This System Guide is designed to show you how to use the online Performance and Development Review (PDR) tool.

- This Guide covers instructions for Employee and managers to complete goal setting in PDR.

**The Process**

**Employee or Manager can initiate drafting goals and adding job knowledge & skills to the form.**

**Employee and Manager discuss goal setting**

**When the process is complete, the Manager selects “Goal Setting Finished”**

**To Logon**

- Go to the page [http://hrweb.mit.edu/performance/pdr](http://hrweb.mit.edu/performance/pdr) then click the button for PDR. Login with your Kerberos username and password.

- For helpful information see MIT’s Knowledge Base (kb.mit.edu). Search for **PDR Help** and click **Performance and Development Review tool - Help Resources**
1. This is the Home screen. From here you will locate the form.

2. On the Performance & Development screen locate and open the PDR form.

- Only forms awaiting action by you are displayed when Inbox is selected. To see other forms, click All Forms (or other display filters) in box on left.
- Click Display Options to hide or show column selection check-boxes.
3. Add, edit, and delete Work goals in the PDR form.

Click the Add Goal text and click this Add Goal button when it pops open.
Caution: Be sure to click the appropriate "Add Goal" button at the *top* of the section you’re currently working in -- either Work Goals or Development Goals. Otherwise, you could accidentally create a Development Goal when you intended a Work Goal.

- Repeat this process to add, edit, or delete more Work Goals.
- Your work will be saved when you click the save Icon at the top of the form.
Special Note

Copy-pasting text directly from Microsoft Word into a PDR form will usually work fine, but it brings some risk of corrupting the form. Those who would like to bring text from MS Word into PDR can do so safely by taking intermediate steps:

1. Select and copy the desired text from MS Word.
2. Paste the text into a text-editor program (Notepad on Windows; TextEdit on Mac).
3. In the text editor, re-select and copy the text.
4. Paste the text into the PDR form.
5. Use the PDR system’s built-in formatting tools as needed.

If a form becomes corrupted (strange formatting, puzzling error messages, or other odd behavior), you may be able to fix it:

- Delete any entries that were pasted from Word
- Reenter the text, either by typing or copy-pasting from a text editor (see above).

However, some forms may have become so corrupted that only starting from a fresh form will enable you to work with the form. If this happens, please report it to your local PDR contacts (http://hrweb.mit.edu/performance/pdr/local).

4. Repeat the process in Step 3 for Development goals.

- Use the same process to add Development goals that you used to enter Work goals.
5. Add Specific Job Knowledge and Skills

- Please note the issue which may arise when copying and pasting directly from Microsoft Word (see the Special Note on page 6)
6. Save, print, or create a PDF copy of the form. (Optional)

- Scroll to the top of the form for access to these options.
- Choosing the “Save” icon saves the form so you can continue working.
- It’s best to use the print icon at the top right of the form rather than your browser’s print function.
- Click on Actions to spell check the form.
- Click on History → Performance form history to view prior years’ forms.

7. Employees select “Save and Close”

Select the Save and Close link to allow your manager access or for you to make later edits or additions.

What Happens Next?

1. Both Employee and Manager can continue to add, modify, and delete goals.
2. While your form is being edited by either employee or manager there is an option to view, print, or save the form as a PDF.
3. When your manager has finalized your goals, the form will move to the mid-year phase. Check with your manager to find out when your mid-year update will take place.
8. Managers select the “Save and close” link or “Goal Setting Finished” button

- Selecting the “Save and Close” link allows the other party access to the form or you may return later.
- Remember to Click “Goal Setting Finished” a second time on the notification page.
- When Goal Setting Finished is clicked, the form moves to the Mid-Year phase. You and your employee can still find the form in your inbox on the Performance & Development Review page.

The form is now available to manager and employee for the Mid-Year Update, which can be schedule in the future. The goal-setting process is now complete.