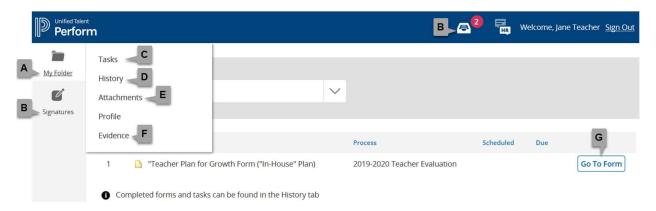


# Direct Report Quick Start Guide

**Unified Talent Perform** 

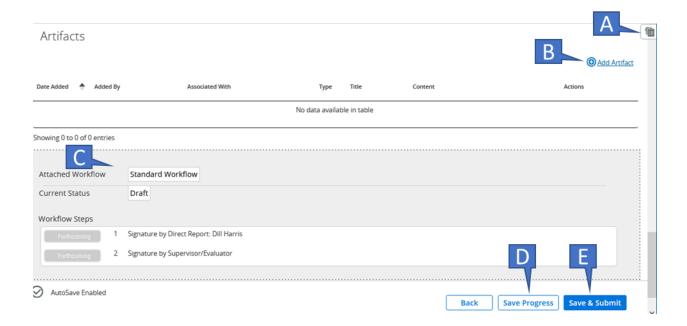
## **Direct Report**

## My Folder



- A. My Folder: View your tasks and evidence here.
- **B. Signatures**: Electronically review, sign, or approve forms.
- **C. Tasks**: Review the tasks assigned to you that need to be completed.
- **D. History**: Review your completed tasks and forms.
- **E. Attachments**: View documents shared by supervisors.
- **F. Evidence**: Access the list of artifacts that you have attached to your forms, as well as notes shared with you by supervisors.
- **G. Go To Form**: Click to open and complete the form.

#### **Forms**



- A. Form Review Tool: Access a slide-out tool to view any completed forms in the process.
- **B.** Artifacts: Add any number of artifacts/attachments up to 10mb in size. May not be present on all forms. See next page for more details on adding artifacts.
- **C. Workflow:** View the signature, approval, or review steps that must be completed once the form is submitted. May not be present on all forms.
- **D. Save Progress:** While the form does auto-save, it is always a good idea to Save Progress prior to exiting the form to be sure your changes are saved.
- **E. Save & Submit:** Save the form, lock it from further edits, and begin the workflow defined for the form. Click this only when you have completed all of your edits.

#### Evidence

#### Add an Artifact



- 1. Click Add Artifact at the bottom of the form.
- 2. Enter the Title.
- 3. Select File to Upload or URL.
- 4. Click Save Artifact.

### Signatures and Approvals



- A. Signatures: Review and electronically sign or approve forms.
- **B.** View and Sign: This button name changes depending on whether you are signing, approving, or reviewing a form. Click to view the completed form, then scroll to the bottom to complete the assigned step.