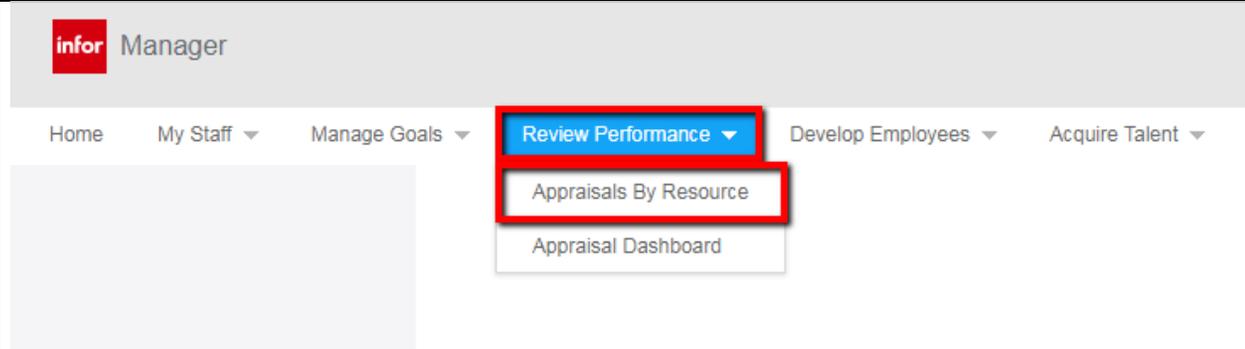


## How to Add an Attachment to a Manager Appraisal

The purpose of this document is to show managers how to attach a document to the manager appraisal. This document will also show how to view the attachment once the appraisal has been finalized. Please note: you can only add attachments if the appraisal is in Draft or In Progress status. You cannot add attachments once the appraisal has been finalized.

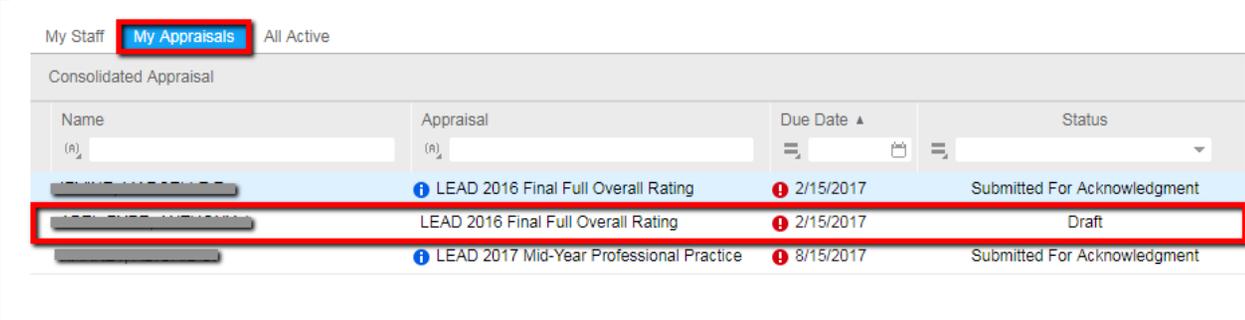
Step	Screenshot
1. Log into <a href="#">Infor HR</a>	
2. Navigate to Manager Space	

3. Click **Review Performance** and select **Appraisals By Resource** from the menu options



The screenshot shows the Infor Manager interface. The navigation bar includes 'Home', 'My Staff', 'Manage Goals', 'Review Performance', 'Develop Employees', and 'Acquire Talent'. The 'Review Performance' dropdown menu is open, showing 'Appraisals By Resource' and 'Appraisal Dashboard' options. Red boxes highlight the 'Review Performance' dropdown and the 'Appraisals By Resource' option.

4. Click on the **My Appraisals** tab and double click on the appraisal that you wish to add the attachment to



The screenshot shows the 'My Appraisals' tab in the Infor Manager interface. A table titled 'Consolidated Appraisal' is displayed with columns for Name, Appraisal, Due Date, and Status. The 'My Appraisals' tab is highlighted with a red box. The table contains three rows of appraisal data, with the second row highlighted by a red box.

Name	Appraisal	Due Date	Status
[REDACTED]	LEAD 2016 Final Full Overall Rating	2/15/2017	Submitted For Acknowledgment
[REDACTED]	LEAD 2016 Final Full Overall Rating	2/15/2017	Draft
[REDACTED]	LEAD 2017 Mid-Year Professional Practice	8/15/2017	Submitted For Acknowledgment

5. Click on the manager appraisal then click attachments

Performance Appraisal: LEAD 2016 Final Full Overall Rating

Start Appraisal | Notify Resource | Update Overall Rating | Consolidated Appraisal

 - 47513  
 Performance Review Period: 1/1/2016 - 12/31/2016  
 Please Complete By: 2/15/2017  
 Estimated % Complete: 0 %  
 Appraisal Owner: 100019934 PETER CASTILLO

Welcome to the LEAD 2016 Final Full Overall Rating. **The employee is receiving the Final Full Overall Ratings because they were in February 2016. The employee will receive an overall rating this performance cycle.** Please refer to the step-by-step in resources on the Principal Portal (click here: <http://tinyurl.com/h4s3zab>) for additional information. To begin the appraisal, please click on the "Appraisal" above.

Mission | Instructions | **Attachments** | Take Notes | Self Appraisal | Historical Appraisals

Appraisal Status

Document Type	Appraisal Owner	Supervisor	Status
<b>Manager</b>	[Redacted]	[Redacted]	Draft
Employee	[Redacted]	[Redacted]	Draft

Records Per Page: 10

6. A new window will open, click the create icon by clicking on the paper with the plus symbol, or actions → Create

### Attachments

    | Actions ▾ Options ▾ Drill Around® ▾

File Name

7. Click the **folder** icon to browse for the file

### Manage Attachment



#### Attachment Information

\*  

8. Once the file is selected, click the **save** icon, or go to actions → save

### Manage Attachment



#### Attachment Information

\* C:\fakepath\235-DAY-3 

9. The file will then appear under **Manage attachments**

### Manage Attachment





 | Actions ▾ Options ▾ Drill Around® ▾

#### Attachment Information

235-DAY-3.pdf 

10. To view the attachment once the appraisal has been finalized, navigate back to the appraisal dashboard and filter by the employees name under the **historical** section. Click on the appraisal and an **attachments** button should appear at the top

### Historical

Consolidated Appraisal		Attachments		Export to CSV	
Name	Appraisal	Period B...	Period E...	Document Type	
(A) Anthony	(A) [Redacted]	[Icons]	[Icons]	(A) [Redacted]	
[Redacted]	LEAP Final Score 2013-2014	9/1/2013	8/31/2014	Manager	(C)
[Redacted]	LEAP Final Scores	9/1/2014	8/31/2015	Manager	(C)
[Redacted]	LEAP Final Score	9/1/2015	8/31/2016	Manager	(C)
[Redacted]	LEAP Final Score	9/1/2016	8/31/2017	Manager	(C)
[Redacted]	LEAD 2017 Final Overall Ratin	1/1/2017	12/31/2017	Manager	(C)
[Redacted]	LEAD 2017 Final Overall Ratin	1/1/2017	12/31/2017	Employee	(C)

11. The **attachment** appears under that attachments button

#### Attachments

File Name	Date Uploaded
235-Day Admin ProTech 17-18.pdf	3/2/2018