

employee

TRAKSTAR
QUICK
GUIDE



Contents

Log in	2
Change Password/Picture	3
Self-Appraisal	4
Take a note	6
Add a Goal	8
Add a Measurement	11
Provide Multi-Rater Feedback	14

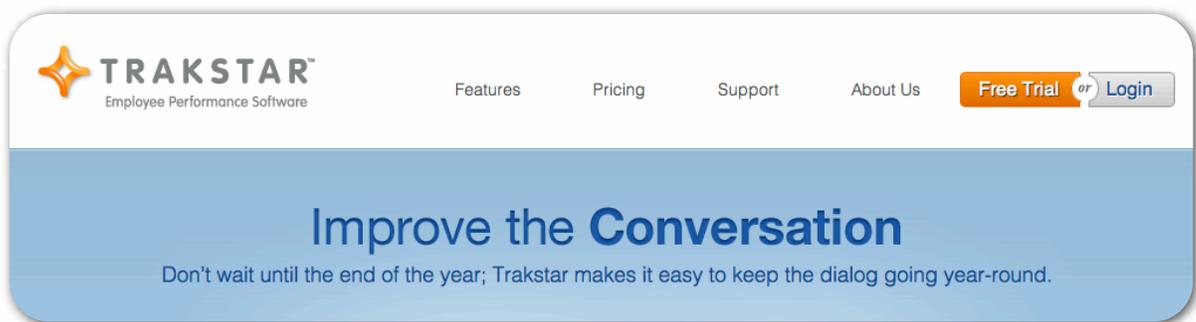


Log-in to Trakstar

① www.trakstar.com

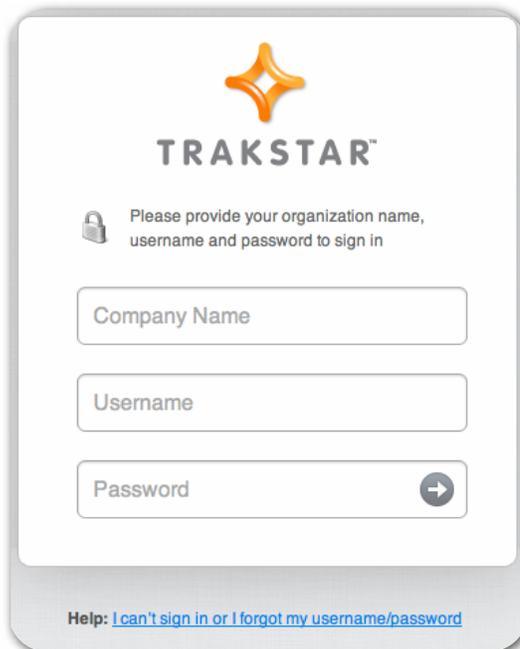
②

Locate the Login button at the top right of the screen.



③

The Company Name, Username, and Password are all case-sensitive.

A screenshot of the Trakstar login form. At the top is the Trakstar logo. Below it is the text "Please provide your organization name, username and password to sign in" with a lock icon. There are three input fields: "Company Name", "Username", and "Password". The "Password" field has a right-pointing arrow icon. At the bottom, there is a "Help" link: "Help: [I can't sign in or I forgot my username/password](#)".

Change Password or Picture

1

Select My Info from the Navigation Bar.

Logged in as Jane Eyre

TRAKSTAR

Task List **1** My Info My Appraisals My Notes

My Info

Jane Eyre

Employee #	1003	Email Address	nobody@promantek.
Date of Hire	12/8/2010	Login ID	jeyre
	Change Password	Roles	Employee
Department	Reception		
Committee	None		

2

Type in your old password, and the new one. Verify it.

Change Password

Old Password

New Password

Verify Password

3

Hover on the picture to change it.

Logged in as Jane Eyre

TRAKSTAR

Task List **1** My Info My Appraisals My Notes

My Info

Change **Jane Eyre**

Employee #	1003	Email	
Date of Hire	12/8/2010	Login	
	Change Password	Roles	
Department	Reception		
Committee	None		

4

Choose an image from your hard drive. It's a thumbnail, a 16x16 picture works best.

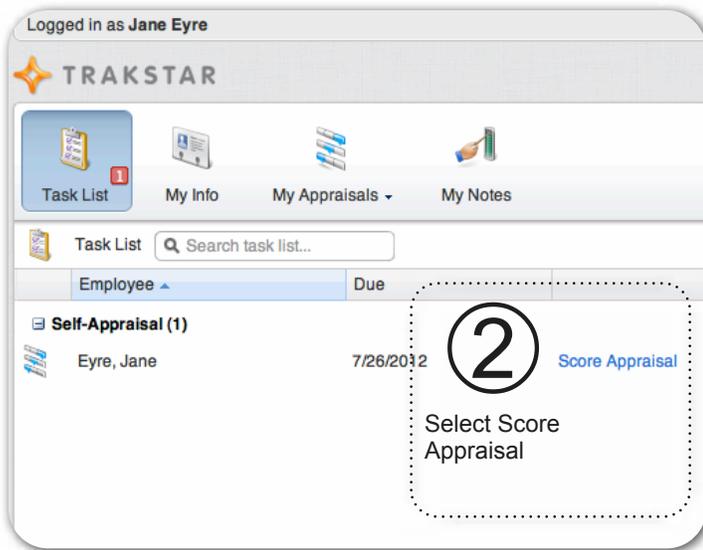
Select an image:

no file selected

Self-Appraisal

1

Find your Appraisal in the Task List.



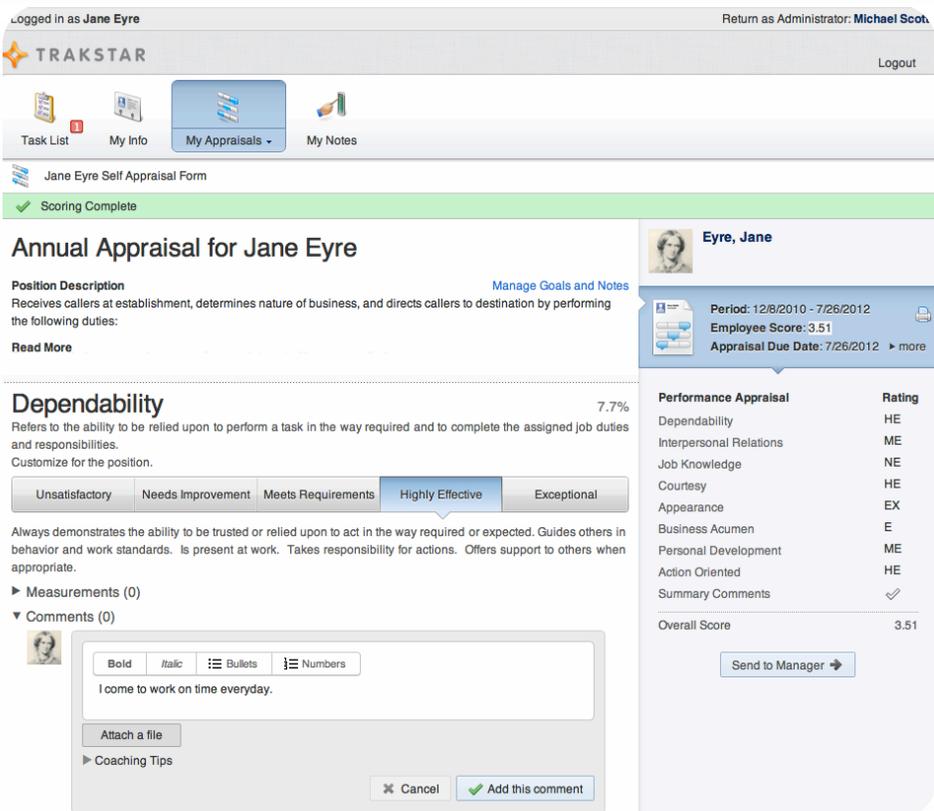
Helpful Information

Your Self-Appraisal will be in the Task List when you are within 30 days* of the Appraisal Due Date. So, if your Appraisal is due on 7/26/2012, the Self-Appraisal window opens on 6/26/2012.

*Your organization may provide more or less than 30 days in which to complete your Appraisal.

3

View your Appraisal.



Score your Self-Appraisal

Logged in as Jane Eyre Return as Administrator: Michael Scott

TRAKSTAR Logout

Task List 1 My Info My Appraisals 2 My Notes

Jane Eyre Self Appraisal Form

✔ Scoring Complete

Annual Appraisal for Jane Eyre

Position Description Manage Goals and Notes
 Receives callers at establishment, determines nature of business, and directs callers to destination by performing the following duties:
[Read More](#)

Dependability 1 2 7.7%

Refers to the ability to be relied upon to perform a task in the way required and to complete the assigned job duties and responsibilities.
 Customize for the position.

3 Unsatisfactory Needs Improvement Meets Requirements **Highly Effective** Exceptional

Always demonstrates the ability to be trusted or relied upon to act in the way required or expected. Guides others in behavior and work standards. Is present at work. Takes responsibility for actions. Offers support to others when appropriate.

► Measurements (0)
 ▼ Comments (0)

4 5

Performance Appraisal Rating

Dependability	HE
Interpersonal Relations	ME
Job Knowledge	NE
Courtesy	HE
Appearance	EX
Business Acumen	E
Personal Development	ME
Action Oriented	HE
Summary Comments	✔
Overall Score	3.51

7 8

Period: 12/8/2010 - 7/26/2012 Employee Score: 3.51 Appraisal Due Date: 7/26/2012 ▶ more

Send to Manager →

① Competency - this is an expectation associated with a position.

② Weight associated with an element that will be scored.

③ Select your rating.

④ Add comments if desired.

⑤ Attach a file if desired (Customer letter, Certificate, etc.)

⑥ Period (beginning/end date for the Appraisal)

⑦ Appraisal document summary outline, which contains the overall score.

⑧ Send to Manager upon completion of your self-appraisal. *NOTE: The Self-Appraisal cannot be edited once it has been sent to your manager.*

Take a Note

1

Find your Appraisal under the My Notes tab.

Logged in as Dorothy Gale

TRAKSTAR

Task List **1** My Info My Appraisals My Notes

Notes

CURRENT APPRAISAL

Period: 7/26/2012 - 3/4/2013
Appraisal Due Date: 3/4/2013
Manager: Michael Scott [▶ more](#)

Take notes on your active appraisal and view notes your manager may have taken.

2

Select the competency or goal on which you wish to take a note. Turn down the arrow.

TRAKSTAR

Task List **1** My Info My Appraisals My Notes

Performance Appraisal

Switched to the Employee role.

Appraisal for Dorothy Gale

Position Description
TBD

[+ Add a goal](#)

Manage the ABC customer relationship.
Be the single point of contact for ABC customer. Direct the workload to the appropriate person.

▼ Measurements (0)
▶ Notes (0)

Take a Note, continued

Manage the ABC customer relationship. added by Dorothy Gale 25%

Be the single point of contact for ABC customer. Direct the workload to the appropriate team members.

▼ Measurements (0)

[+ Add Measurement](#)

▼ Notes (0)



Bold *Italic* Bullets Numbers

③ I have scheduled weekly meetings with ABC customer and we use online tools to track issues and projects.

④

Keep Private Yes No ⑤

⑥

③ Type your note in the field.

④ Attach a file if desired (Customer Letter, Certificate, etc.)

⑤ Decide if you wish to keep your note private, or share it with your manager.

⑥ Add your note.

Add a Goal

1

Find your Appraisal in the Task List or in the Appraisal tab. Select "Set Goals and Take Notes."

Logged in as Dorothy Gale

TRAKSTAR

Task List Appraisals Notes My Employees Track Goals

Task List Search task list...

Employee	Due
Set Goals and Add Notes (1)	
Gale, Dorothy	3/4/2013

Set Goals and Take Notes

Helpful Information

Goals are specific tasks for which an employee is held accountable. Goals are entered as unique line items on an Appraisal form.

Goals *usually* (but not always) have mathematical consequence on the outcome of a Final Appraisal Score, because they are rated independently.

Goals are used by organizations where the expectations in a position change from year to year in size and importance.

If Goal Setting is enabled, you will see the "Add a Goal" button.

If not, you will be able to add a Measurement which is attached to a competency. Measurements are covered on Page 11.

2

Click "Add a Goal."

Logged in as Dorothy Gale

TRAKSTAR

Task List My Info My Appraisals My Notes

Performance Appraisal

Switched to the Employee role.

Appraisal for Dorothy Gale

Position Description
TBD

+ Add a goal

Sales Skills 33.3%

Able to bring sales opportunities to closure or drive incremental revenue.

Measurements (0) **+ Add Measurement**

Add a Goal, continued

3

Add an existing goal or create a new one. Fill in the name of the goal and a description. Select the appropriate rating scale. Save Goal when done.

Add a goal

Add an existing goal
 Create a new goal

Name:

Description:

Rating Scale:

Exceptional: Substantially exceeds job requirements. Override and Edit Description

Highly Effective: Clearly exceeds job requirements. Override and Edit Description

Meets Requirements: Satisfactorily meets job requirements. Override and Edit Description

Needs Improvement: Barely meets job requirements. Override and Edit Description

Unsatisfactory: Below minimum job requirements. Override and Edit Description

Helpful Information

If you wish to be even more specific with your goal, attach a Measurement to it. Measurements allow dates, times, and progress bars to be used.

4

Select the location of the goal on the Appraisal form.

Add a goal

Where would you like to insert this goal?
Manage the ABC customer relationship.

Top of appraisal
 Bottom of appraisal

5

Now, your new goal shows up as a line item to be rated by itself, both on the form and on the Summary Outline in the gutter.

Performance Appraisal

Appraisal for Dorothy Gale

Position Description: TBD

Manage the ABC customer relationship. added by Dorothy Gale 25%
Be the single point of contact for ABC customer. Direct the workload to the appropriate team members.

▼ Measurements (0)

▼ Notes (1)

Dorothy Gale about an hour ago
I have scheduled weekly meetings with ABC customer and we use online tools to track issues and projects.
[Edit](#) [Delete](#)

Gale, Dorothy

Period: 7/26/2012 - 3/4/2013
Appraisal Due Date: 3/4/2013
Manager: Michael Scott [more](#)

Performance Appraisal

- Manage the ABC customer relationship.
- Sales Skills
- Presentation Skills
- Customer Focus
- General Notes

Add a Goal, continued

6

Hover above the title of the goal to reveal the edit pencil.

Trakstar interface showing a performance appraisal for Dorothy Gale. The goal 'Manage the ABC customer relationship' is highlighted, and an 'Edit' pencil icon is visible above it. The goal description is 'Be the single point of contact for ABC customer. Direct the workload to the appropriate team members.' and it is currently set to 25% weight.

Helpful Information

Editing weights is OPTIONAL. When adding a new line item to the overall Appraisal, you may wish to adjust the mathematical consequence assigned to the new line item.

Is the goal very important? Give it more weight.

Is the goal less important than other things? Give it less weight.

Is the goal equal to all other elements on which you will be rated at the time of the Appraisal? Do nothing.

7

Adjust the weight of the goal. This will affect the weight of other competencies, giving them more or less weight accordingly.

Trakstar interface showing the 'Edit' screen for the goal 'Manage the ABC customer relationship'. The weight is being adjusted from 25% to 5% in the 'Weight (0-100)' field. The 'Save' button is highlighted in green. Below this, another goal 'Sales Skills' is visible with a weight of 25%.

Add Measurement

1

Select the competency or goal to which you wish to add a measurement. Click "Add Measurement."

Sales Skills 33.3%

Able to bring sales opportunities to closure or drive incremental revenue.

▼ Measurements (0) [+ Add Measurement](#)

▼ Notes (0)

Add a note...

Helpful Information

At the time of the Appraisal, the competency to which the measurement is attached is rated-taking the measurement into account for a blended rating of competency/measurement.

More than one measurement may be attached to a competency.

2

Fill in the boxes.

Sales Skills 33.3%

Able to bring sales opportunities to closure or drive incremental revenue.

▼ Measurements (0) [+ Add Measurement](#)

Measurement Description

Bold *Italic* Bullets Numbers

Percent Complete	Status	Started	Due	Completed On
<input type="text" value="50%"/>	<ul style="list-style-type: none">✓ -CanceledBehind TargetNo ProgressIn ProgressOn TargetAhead of TargetCompleted	<input type="text" value="08/01/2012"/>	<input type="text" value="10/31/2012"/>	<input type="text"/>

Add Email Reminder

▼ Notes (0)

Add a note...

Add Measurement, continued

3

Add an email reminder if desired. Fill in the boxes.

Sales Skills

33.3%

Able to bring sales opportunities to closure or drive incremental revenue.

▼ Measurements (0) [+ Add Measurement](#)

 **Attend the Dale Carnegie sales skills course**

Measurement Description

Bold *Italic*  Bullets  Numbers

Attend the Dale Carnegie sales skills course and implement some new techniques.

Percent Complete	Status	Started	Due	Completed On
50% 	In Progress 	08/01/2012	10/31/2012	

Send this email: Days Due Date  

To:

Subject:

 Cancel

Helpful Information

Measurements are specific objectives for which an employee is held accountable.

Unlike goals, Measurements piggyback on a competency and do not stand alone on a form.

Why would an organization choose one over the other?

Sometimes it is important to have consistency on an Appraisal form, with all employees having the same weight associated with competencies. In this case, measurements make sense.

Sometimes, managers and employees need mathematical flexibility on a form, with the ability to assign more or less weight to ever-changing components. In this case, goals make sense.

Provide Multi-Rater Feedback

1

If you are asked to provide Multi-Rater Feedback, you will receive an email and the task will appear in your Task List.

The screenshot shows the TRAKSTAR interface with a navigation bar containing 'Task List', 'My Info', 'My Appraisals', and 'My Notes'. Below the navigation bar is a search box for the task list. The main content area displays a table of tasks:

Employee	Due	Action
Multi-rater Feedback Requests (2)		
Dowd, Joe	12/30/2010	Give Feedback
Johnson, Beverly	10/23/2012	Give Feedback
Self-Appraisal (1)		
Antler, Randy	10/24/2012	Score Appraisal

Helpful Information

If you are asked to provide Multi-Rater feedback on a colleague, your feedback is only visible to the manager requesting your input, not to your colleague.

This is by design. Trakstar provides a safe place for you to provide feedback.

Your feedback will not affect the overall Appraisal score for your colleague. It will only add an additional perspective for your colleague's manager as he/she completes your colleague's Appraisal.

2

Rate your colleague, and add comments if desired.

Your comments and ratings are visible only to the manager.

The screenshot shows the 'Core Values Section' for 'Respect for Others' with a progress indicator of 50%. The description reads: 'Shows respect and appreciation for the ideas and contributions of others. Thoughtfully considers the opinions of others'. Below the description is a rating scale with five options: 'Not Effective', 'Minimally Effective', 'Effective', 'Highly Effective', and 'Exceptional'. The 'Exceptional' option is selected. Below the scale, there is a text box for comments with a rich text editor toolbar (Bold, Italic, Bullets, Numbers) and the text 'Joe is great to work with'. At the bottom, there are buttons for 'Attach a file', 'Cancel', and 'Add this comment'.

3

When you have finished and all elements have been scored and all questions have been answered, Send to Manager.

The screenshot shows the 'Annual Appraisal' interface. The navigation bar includes 'Task List', 'My Info', 'My Appraisals', and 'My Notes'. Below the navigation bar is a 'Multi-Rater Feedback' section. The main content area displays 'Annual Appraisals' for 'Position Description' 'EVP'. A callout box with an orange border highlights the 'Send to Manager' button and contains the text: 'Click here when complete' and 'Click the button below to Send this Appraisal to your Manager once you've complete scoring.' Below the callout box is an 'OK' button. At the bottom of the interface is a 'Send to Manager' button with a right-pointing arrow.