



employee

TRAKSTAR
QUICK
GUIDE

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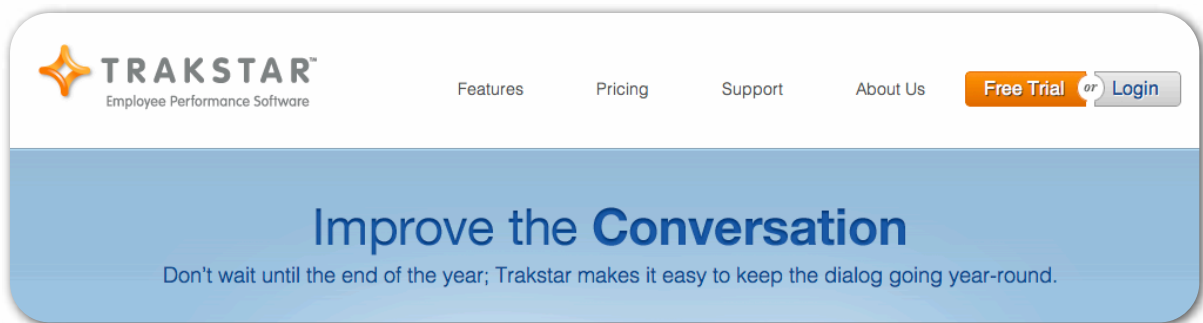


Log-in to Trakstar

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 and the text "TRAKSTAR™". Below this is a lock icon and the text "Please provide your organization name, username and password to sign in". There are three input fields: "Company Name", "Username", and "Password". The "Password" field has a small icon of a right-pointing arrow inside a circle. At the bottom of the form, there is a "Help:" link followed by the text "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

 Cancel  Change 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

 **Jane Eyre**


  Change Password

Employee #	1003	Email	
Date of Hire	12/8/2010	Login	
		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:

 Remove no file selected

Self-Appraisal

1

Find your Appraisal in the Task List.

Logged in as Jane Eyre

TRAKSTAR

Task List My Info My Appraisals My Notes

Task List Search task list...

Employee	Due	
Self-Appraisal (1)		
Eyre, Jane	7/26/2012	Score Appraisal

Select Score Appraisal

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.

Logged in as Jane Eyre Return as Administrator: Michael Scot Logout

TRAKSTAR

Task List My Info My Appraisals My Notes

Jane Eyre Self Appraisal Form

Scoring Complete

Annual Appraisal for Jane Eyre

[Manage Goals and Notes](#)

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

Dependability 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.
 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)
 I come to work on time everyday.
 Attach a file
 ▶ Coaching Tips
 Cancel Add this comment

Performance Appraisal

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

[Send to Manager](#)

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

Score your Self-Appraisal

Logged in as **Jane Eyre** Return as Administrator: **Michael Scott**

TRAKSTAR Logout

Task List 1 My Info My Appraisals ▼ 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 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

4 I come to work on time everyday.

5 Attach a file

► Coaching Tips

✕ Cancel Add this comment

Eyre, Jane

6 Period: 12/8/2010 - 7/26/2012 📄

Employee Score: 3.51

Appraisal Due Date: 7/26/2012 ► more

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

8 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.)

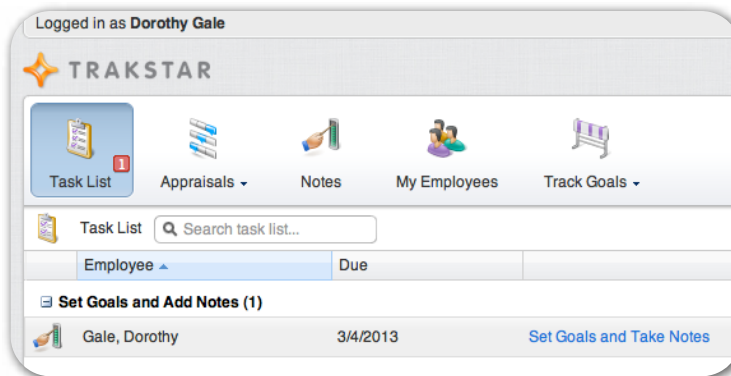
⑤ Decide if you wish to keep your note private, or share it with your manager.

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."



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.

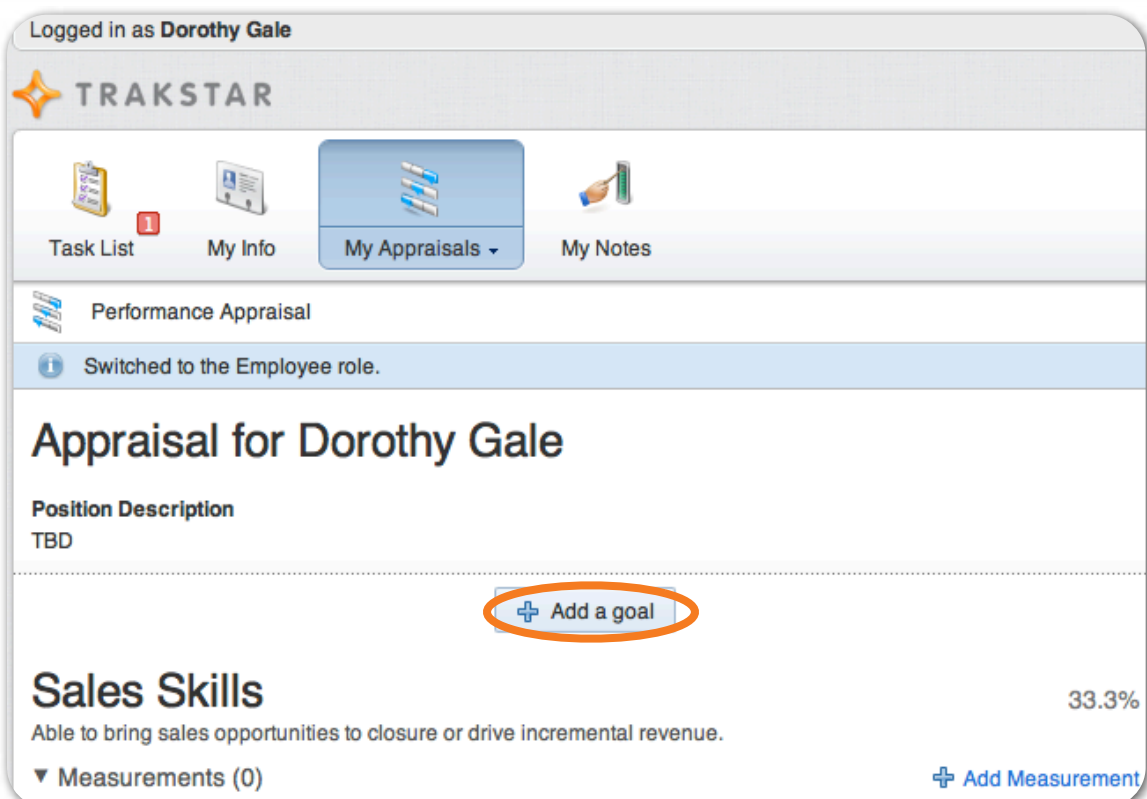
Goals are used by organizations where the expectations in a position change from year to year in size and importance.

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."



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 an 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.

Logged in as Dorothy Gale

TRAKSTAR

Task List My Info My Appraisals My Notes

Performance Appraisal

Appraisal for Dorothy Gale

Position Description
TBD

+ Add a goal Edit

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

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

Task List My Info My Appraisals My Notes

Performance Appraisal

Appraisal for Dorothy Gale

Position Description
TBD

+ Add a goal

Editing : Manage the ABC customer relationship. [X Cancel] [✓ Save]

Manage the ABC customer relationship. Weight (0-100) 5 25%
Be the single point of contact for ABC customer. Direct the workload to the appropriate team members.

Sales Skills 25%
Able to bring sales opportunities to closure or drive incremental revenue.

▼ Measurements (0) + Add Measurement

Add Measurement

1

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

Sales Skills

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

33.3%

▼ 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

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

33.3%

▼ 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%	<div> <div>✓ -</div> <div>Canceled</div> <div>Behind Target</div> <div>No Progress</div> <div>In Progress</div> <div>On Target</div> <div>Ahead of Target</div> <div>Completed</div> </div>	08/01/2012	10/31/2012	

[Add Email Reminder](#) [Cancel](#) [Save](#)

▼ Notes (0)

Add a note...

Add Measurement, continued


3

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



Sales Skills

Able to bring sales opportunities to closure or drive incremental revenue. 33.3%



▼ 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  before  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.

TRAKSTAR

Task List My Info My Appraisals My Notes

Task List Search task list...

Employee	Due	
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.

Core Values Section 54.5%

Respect for Others 50%


Shows respect and appreciation for the ideas and contributions of others. Thoughtfully considers the opinions of others

Not Effective Minimally Effective Effective Highly Effective **Exceptional**

Substantially exceeds job requirements.

Measurements (10)

Comments (0)

 **Joe is great to work with.**

Coaching Tips

Attach a file Cancel Add this comment

3

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

Task List My Info My Appraisals My Notes

Multi-Rater Feedback

Annual Appraisal

Position Description
EVP

Click here when complete

Click the button below to Send this Appraisal to your Manager once you've complete scoring.

OK

Send to Manager →