

# manager

TRAKSTAR  
QUICK  
GUIDE

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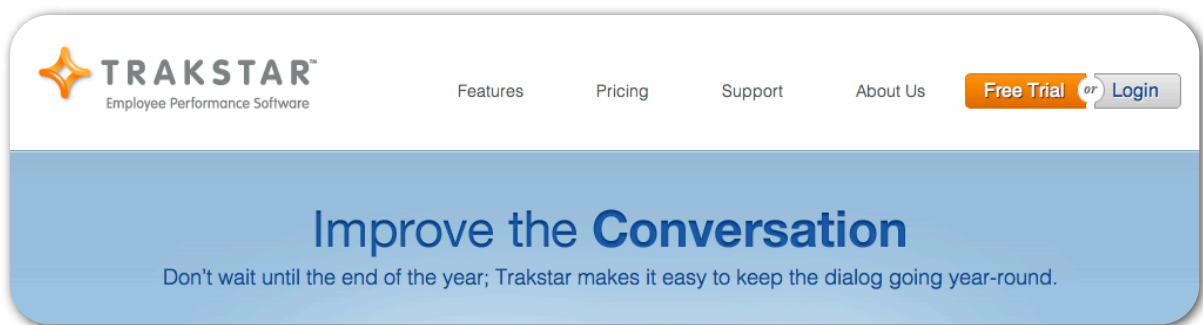


## Log-in to Trakstar

① [www.trakstar.com](http://www.trakstar.com)

②

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



③

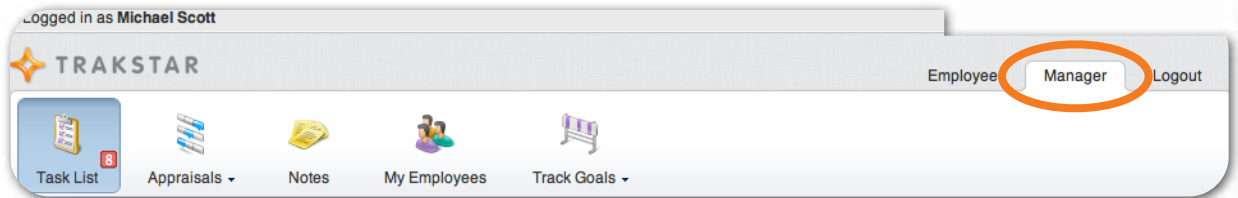
The Company Name, Username, and Password are all case-sensitive.

A screenshot of the Trakstar login form. At the top is the Trakstar logo (an orange star) and the text "TRAKSTAR™". Below the logo 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 eye icon to its right. At the bottom of the form is a link that says "Help: [I can't sign in or I forgot my username/password](#)".

## Switching Roles

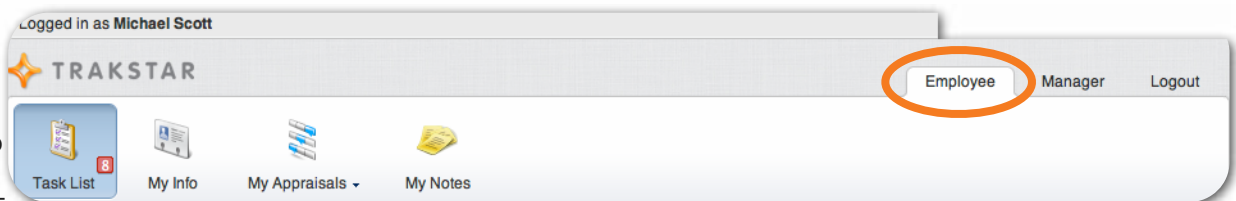
1

Use the Manager tab to conduct employee Appraisals and take notes on employees.



2

Use the Employee tab to conduct your own self-appraisal, and change your password.



## Change Your Password or Picture

1

Select My Info from the Navigation Bar.


(Employee Role)

Logged in as Michael Scott

**TRAKSTAR**

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

My Info

 **Michael Scott**

Employee #	1002	Email Address	nobody@prom
Date of Hire	8/2/2007	Login ID	msscott
	<a href="#">Change Password</a>	Roles	Manager Employee
Department	Management		
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 Michael Scott

**TRAKSTAR**

Task List **My Info** My Appraisals

My Info


[Change](#)  **Michael Scott**

Employee #	1002
Date of Hire	8/2/2007

[Change Password](#)

4

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

 Select an image:

[Remove](#) [Choose File](#) no file selected

[Cancel](#) [Save](#)

## Score your own Self-Appraisal

1

Find your Self-Appraisal in the Task List.

As a manager, you may see multiple tasks in the Task List,

(Employee Role)

Logged in as Michael Scott

TRAKSTAR

Task List My Info My Appraisals My Notes

Task List Search task list...

Employee	Due	
<b>Appraisals (5)</b>		
Eyre, Jane	8/27/2012	<a href="#">Score Appraisal</a>
Halpert, Jim	7/26/2012	<a href="#">Score Appraisal</a>
Kapoor, Kelly	7/26/2012	<a href="#">Score Appraisal</a>
Philbin, Darryl	7/26/2012	<a href="#">Score Appraisal</a>
Schrute, Dwight	8/21/2012	<a href="#">Score Appraisal</a>
<b>Approve Appraisals (1)</b>		
Kapoor, Kelly	7/26/2012	<a href="#">Approve or Reject</a>
<b>Self-Appraisal (1)</b>		
Scott, Michael	7/26/2012	<a href="#">Score Appraisal</a>
<b>Set Goals and Add Notes (1)</b>		
Gale, Dorothy	3/4/2013	<a href="#">Set Goals and Take Notes</a>

### 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.*

2

View your Appraisal.

TRAKSTAR

Employee Manager Logout

Task List My Info My Appraisals My Notes

Michael Scott Self Appraisal Form

Switched to the Employee role.

### Annual Appraisal for Michael Scott

Position Description Regional Manager [Manage Goals and Notes](#)

Period: 8/2/2007 - 7/26/2012  
Employee Score: 3.24  
Appraisal Due Date: 7/26/2012 [more](#)

#### Core Values Section

Core Values for all Dundermifflin employees

#### Integrity and Trust

50%  
Widely trusted and seen as a direct, truthful individual. Able to present the truth in an appropriate and helpful manner. Keep confidences and does not misrepresent for personal gain.

Unsatisfactory Needs Improvement Meets Requirements Highly Effective Exceptional

Shows some inconsistency in demonstrating the ability to be trusted. There may be evidence of occasionally revealing personal confidences or blaming others for their mistakes.

Measurements (0)

Comments (0)

**Bold** *Italic*

The one true rumor--and this is going to ruin this person's life--is that--

Attach a file

Coaching Tips

Cancel [Add this comment](#)

#### Performance Appraisal

	Rating
Core Values Section	2.4
Integrity and Trust	ME
Humor	-
Management Section	3.6
Continuous Learning	E
Building Teams	-
Areas for Improvement	
Strengths	
Summary Comments	
Overall Score	3.24

[Send to Manager](#)

## Score your own Self-Appraisal, continued

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

**TRAKSTAR** Employee Manager Logout

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

Michael Scott Self Appraisal Form

Switched to the Employee role.

### Annual Appraisal for Michael Scott

**Position Description**  
Regional Manager Manage Goals and Notes

**Core Values Section** 30%  
Core Values for all Dundermifflin employees

**Integrity and Trust** 1 2 50%  
Widely trusted and seen as a direct, truthful individual. Able to present the truth in an appropriate and helpful manner. Keep confidences and does not misrepresent for personal gain.

3 Needs Improvement Meets Requirements Highly Effective Exceptional

Shows some inconsistency in demonstrating the ability to be trusted. There may be evidence of occasionally revealing personal confidences or blaming others for their mistakes.

► **Measurements (0)**  
▼ **Comments (0)**

4 5

**Performance Appraisal** 6

Period: 8/2/2007 - 7/26/2012  
Employee Score: 3.24  
Appraisal Due Date: 7/26/2012 more

Performance Appraisal	Rating
Core Values Section	2.4
Integrity and Trust	ME
Humor	-
Management Section	3.6
Continuous Learning	E
Building Teams	-
Areas for Improvement	✓
Strengths	✓
Summary Comments	✓
<b>Overall Score</b>	<b>3.24</b>

7 8 Send to Manager

Cancel Add this comment

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.**

## Score a Subordinate's Appraisal

1

Select the Employee's Appraisal that you wish to score.

Logged in as **Michael Scott** Return

**TRAKSTAR** Employee Manager

Task List 8 Appraisals ▼ Notes ▼ My Employees ▼ Track Goals ▼

Task List

Employee <span>▲</span>	Due	
<b>Appraisals (5)</b>		
Eyre, Jane	8/27/2012	<a href="#">Score Appraisal</a>
Halpert, Jim	7/26/2012	<a href="#">Score Appraisal</a>
Kapoor, Kelly	7/26/2012	<a href="#">Score Appraisal</a>
Philbin, Darryl	7/26/2012	<a href="#">Score Appraisal</a>
Schrute, Dwight	8/21/2012	<a href="#">Score Appraisal</a>
<b>Approve Appraisals (1)</b>		
Kapoor, Kelly	7/26/2012	<a href="#">Approve or Reject</a>
<b>Self-Appraisal (1)</b>		
Scott, Michael	7/26/2012	<a href="#">Score Appraisal</a>
<b>Set Goals and Add Notes (1)</b>		
Gale, Dorothy	3/4/2013	<a href="#">Set Goals and Take Notes</a>

**Scott, Michael**

2

Score the Appraisal. Here, you can see if the employee has completed his/her self-Appraisal.

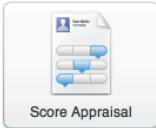
Logged in as **Michael Scott** Return as Administrator: Michael Scott

**TRAKSTAR** Employee Manager Administrator Logout

Task List 8 Appraisals ▼ Notes ▼ My Employees ▼ Track Goals ▼

Appraisal Workshop

### Appraisal for Jane Eyre



Score Appraisal

**Score Appraisal**

Your Status

Self-Appraisal  [Override](#)

**Eyre, Jane**

Period: 12/8/2010 - 8/27/2012

Score: -

Appraisal Due Date: 8/27/2012 [► more](#)

[Manage Goals and Notes](#)



## Score a Subordinate's Appraisal, continued

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

**TRAKSTAR** Employee Manager Administrator Logout


Task List Appraisals Notes My Employees Track Goals

Appraisal Workshop

### Appraisal for Jane Eyre



**Score Appraisal**

Your Status 0% complete

Self-Appraisal 0% complete  [Override](#)

**Eyre, Jane**

Period: 12/8/2010 - 8/27/2012  
Score: -  
Appraisal Due Date: 8/27/2012 ▶ more

  [Manage Goals and Notes](#)

## What if...?

☺ The Employee has not turned in his her self-Appraisal, and you need to move forward anyway.

Solution: *Override the Self-Appraisal.*

☺ ☺ You meant to add some Goals and/or notes to the Appraisal, but time got away from you. You want to add these before doing the Appraisal (hopefully these are goals that have been discussed with the employee prior to the Appraisal.)

Solution: Manage Goals and Notes. (see page -----)

## Score a Subordinate's Appraisal, continued

### Appraisal for Jane Eyre

**Position Description**  
Responsible for Customer Service

[Read More](#) Understand the impact of customer expectations on your business and what it takes to make customers your

### Customer Service

33.3%

Refers to the ability to satisfy the expectations and requirements of customers, both internal and external. Displays courtesy and sensitivity and responds promptly to service requests. Identifies customer needs and explains services clearly.

Jane Eyre

Unsatisfactory Needs Improvement Meets Requirements Highly Effective Exceptional

Gets first-hand information and uses it to improve services. Acts with customers in mind and establishes and maintains positive relationships, earning customers' trust and respect. Provides the highest level of customer service even in difficult situations by prioritizing the needs. Presents self and organization policies in a manner that consistently reflect well on the organization.

Measurements (1)

**Respond to RFP's**  
Plan and design RFP responses for customers to include market research, economic impact information and basic design consultation.

Percent Complete	Status	Started	Due
<div><div></div></div> 20%	In Progress	6/1/2012	8/27/2012

**Tasks**

Add Task

Edit • Delete

Comments (1)

Jane Eyre 5 minutes ago  
I have worked hard on multiple RFP's this year and we've won several of them.

Add a comment...

Attach a file

Coaching Tips

Cancel Add this comment

**Eyre, Jane**

Period: 12/8/2010 - 8/27/2012  
Score: 6  
Appraisal Due Date: 8/27/2012 ▶ more

Performance Appraisal	Rating
Customer Service	EX
Job Knowledge	-
Work Quantity & Productivity	-
Summary Comments	
Overall Score	6

Return to Workshop

① Toggle button. Add Goals/Measurements if you have forgotten to so prior to the Appraisal, and use the same button to Score Appraisal after adding goals.

② Reveal the position description.

③ Hover to see the employee's rating selection. Select your rating for the employee.

④ Use the down arrow to reveal Measurements, if a measurement has been set.

⑤ Use the down arrow to reveal notes and comments from the employee.

⑥ Add your own comments, if desired.

⑦ Attach a file (Customer letter, etc.) if desired.

⑧ Reveal Coaching Tips, copy to comments if desired.

⑨ Appraisal Summary with short ratings and scores.

⑩ Return to Workshop to Route for Approval.

## Take a Note on Yourself

1

Find your Appraisal under the My Notes tab.

Click on the document icon.

(Employee Role)


Logged in as **Michael Scott**

**TRAKSTAR**

Task List **8** My Info My Appraisals **▼** **My Notes**

**Notes**

**CURRENT APPRAISAL**

 **Period:** 8/2/2007 - 7/26/2012  
**Appraisal Due Date:** 7/26/2012  
**Manager:** Ryan Howard [► 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 **8** My Info **My Appraisals ▼** My Notes

**Performance Appraisal**

**Annual Appraisal for Michael Scott**

**Position Description**  
Regional Manager

[+ Add a goal](#)

**Core Values Section** 30%  
Core Values for all Dundermifflin employees

**Integrity and Trust** 50%  
Widely trusted and seen as a direct, truthful individual. Able to present the truth in an appropriate and helpful manner. Keep confidences and does not misrepresent for personal gain.

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

**▼ Notes (0)**

Add a note...

## Take a Note on Yourself, continued

### Core Values Section

30%

Core Values for all Dundermifflin employees

### Integrity and Trust

50%

Widely trusted and seen as a direct, truthful individual. Able to present the truth in an appropriate and helpful manner. Keep confidences and does not misrepresent for personal gain.

▼ Measurements (0)

[+ Add Measurement](#)

▼ Notes (0)



**Bold**

*Italic*

☰ Bullets

☰ Numbers

③

So I was in the office. And I look over, to our accounting division and there is Kevin Malone. Kevin is wearing, a jacket that I've never seen before. And, I call over to Kevin, Kevin! Is that a tweed jacket. And he looks at me and he says Michael yes it is a tweed jacket. And I look back at him and I say, I feel the NEED! The need for tweed.

④

Attach a file

Keep Private Yes ☐ No ☒

⑤

✕ Cancel

✓ Add this note

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.

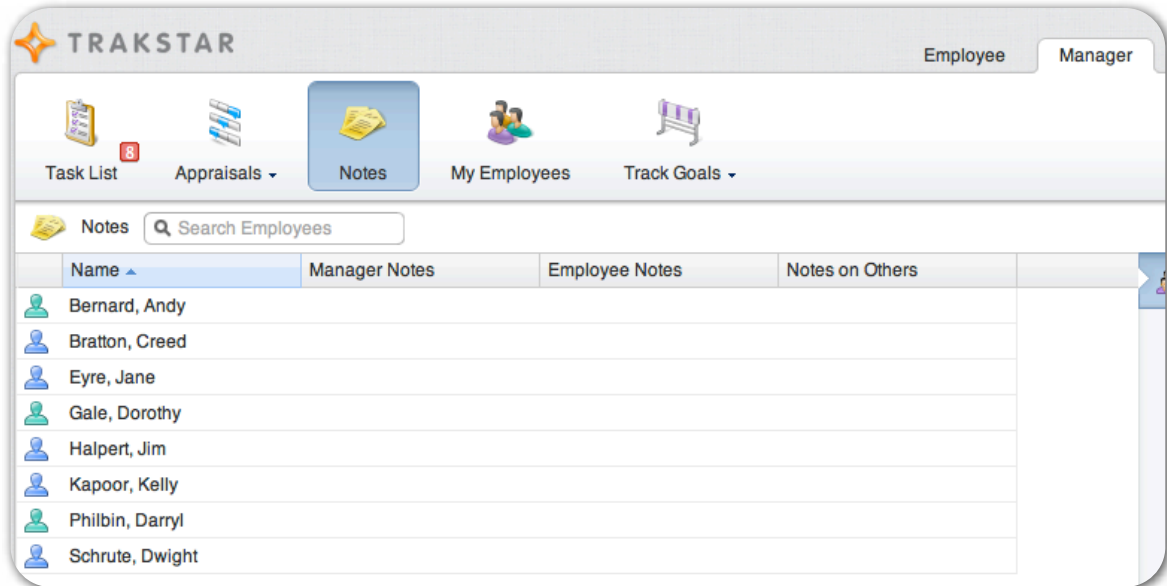
## Take a Note on a Subordinate

1

Select the Notes tab from the Navigation Bar.

Select the employee on whom you wish to take a note.

(Manager Role)



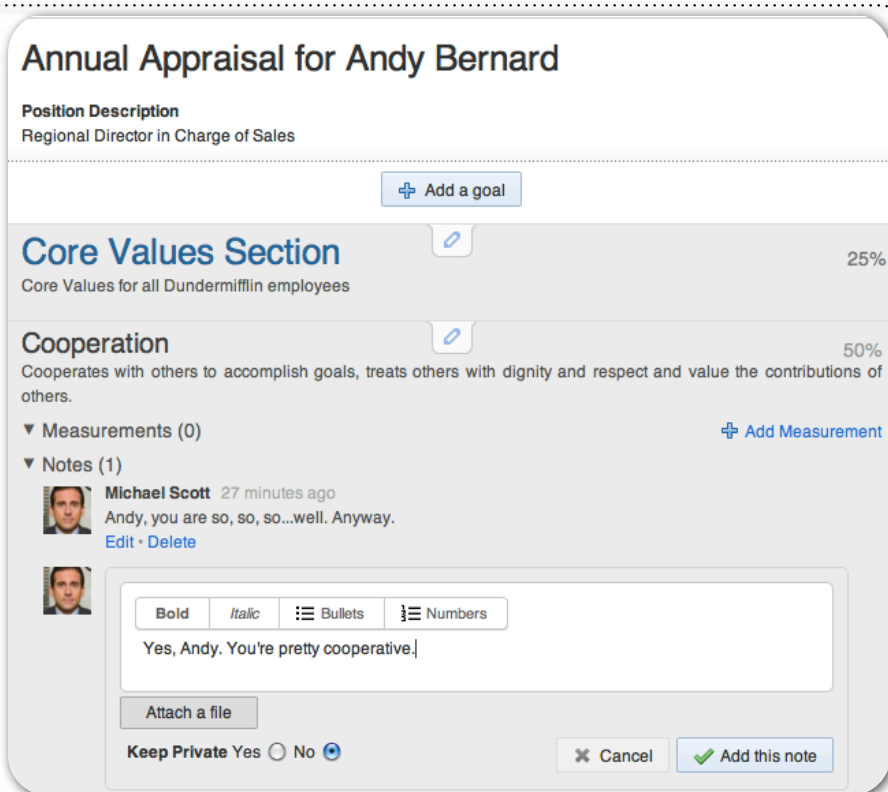
2

Turn down the Notes arrow to reveal a notes field.

Attach a file if desired to document the note.

Decide if you wish to keep the note private or share it with the Employee.

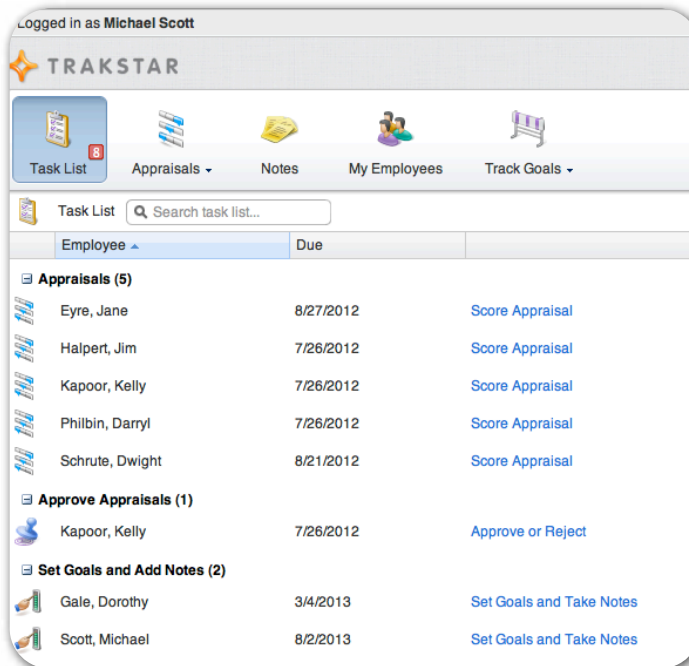
Add the Note.



## Add a Goal to your own Appraisal

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.

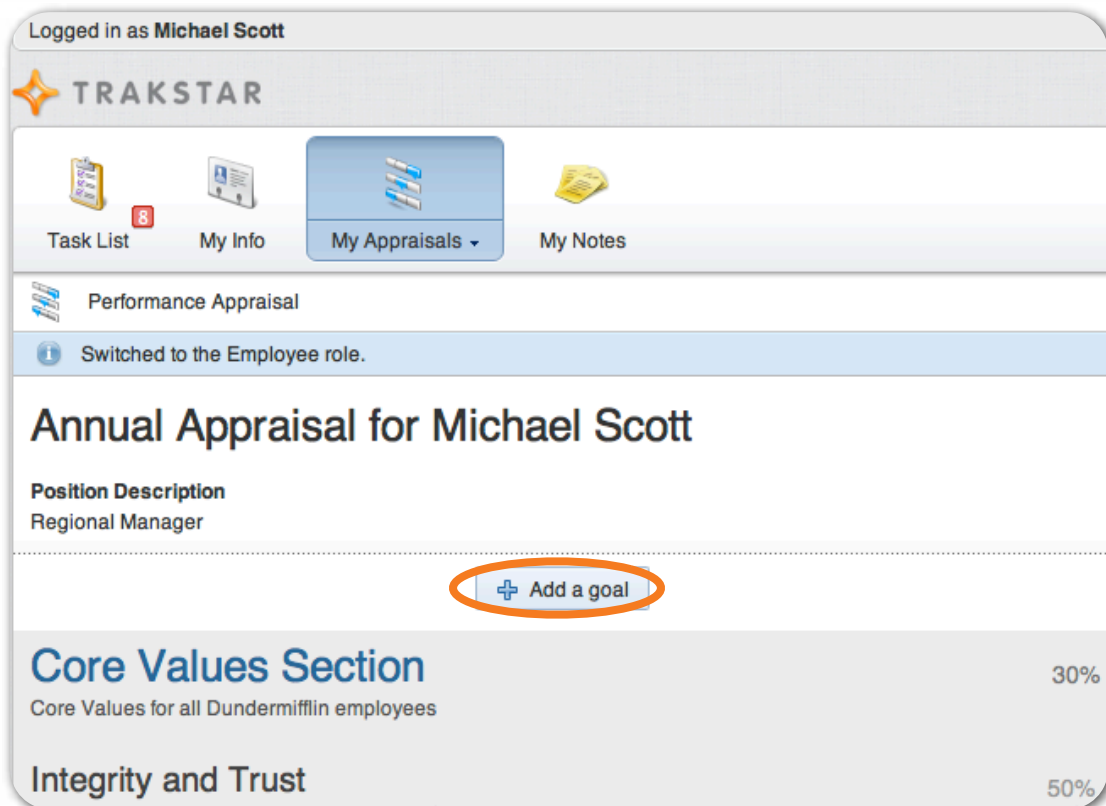
Goals are used by organizations where the expectations in a position change from year to year in size and importance.

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 to your own Appraisal, 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.

### 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.

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.



## Add a Goal to your own Appraisal, continued

6

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

**Annual Appraisal for Michael Scott**

Position Description  
Regional Manager

[+ Add goal](#) [Edit](#)

**Manage the ABC customer relationship** added by Michael Scott 4.8%  
Be the single point of contact for ABC customer. Direct the workload to the appropriate team members.

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

▼ Notes (0)  
Add a note...

### 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 Appraisal elements, giving them more or less weight accordingly.

**TRAKSTAR**

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

Performance Appraisal

Switched to the Employee role.

**Annual Appraisal for Michael Scott**

Position Description  
Regional Manager

[+ Add a goal](#)

**Editing : Manage the ABC customer relationship** [Cancel](#) [Save](#)

**Manage the ABC customer relationship** Weight (0-100)  4.8%  
Be the single point of contact for ABC customer. Direct the workload to the appropriate team members.

**Core Values Section** [Edit](#) 30%  
Core Values for all Dundermifflin employees



## Add a Goal to a Subordinate's Appraisal

1

For 3 weeks following an Appraisal, an Employee's Appraisal Document will be in the "Set Goals and Take Notes" phase (see Dorothy Gale here.)

(Manager Role)

Employee	Due	Action
<b>Appraisals (5)</b>		
Eyre, Jane	8/27/2012	Score Appraisal
Halpert, Jim	7/26/2012	Score Appraisal
Kapoor, Kelly	7/26/2012	Score Appraisal
Philbin, Darryl	7/26/2012	Score Appraisal
Schrute, Dwight	8/21/2012	Score Appraisal
<b>Approve Appraisals (1)</b>		
Kapoor, Kelly	7/26/2012	Approve or Reject
<b>Self-Appraisal (1)</b>		
Scott, Michael	7/26/2012	Score Appraisal
<b>Set Goals and Add Notes (1)</b>		
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

Select an Employee for whom you wish to add a goal from the My Employees tab on the Navigation Bar.

(Manager Role)

Name	Manager	Employee #	Position	Next Appraisal...	Date of Hire
Bernard, Andy	Scott, Michael	1007	Regional Director in Ch...	12/13/2012	12/13/2012
Bratton, Creed	Scott, Michael	1006	Quality Assurance	1/1/2013	1/1/2011
Eyre, Jane	Scott, Michael	1003	Customer Service Repr...	8/27/2012	12/8/2011
Gale, Dorothy	Scott, Michael	1008	Account Executive	3/4/2013	3/4/2012
Halpert, Jim	Scott, Michael	1005	Assistant Regional Man...	7/26/2012	2/21/2011
Kapoor, Kelly	Scott, Michael	1009	Customer Service Rep	7/26/2012	4/10/2011
Philbin, Darryl	Scott, Michael	1010	Warehouse Foreman	7/26/2012	9/28/2009
Schrute, Dwight	Scott, Michael	1004	Test Position	8/21/2012	4/2/2009

## Add Goal to a Subordinate's Appraisal, continued

3

You will be taken to the employee record if Goal Setting takes place more than 3 weeks after the last Appraisal.

Select the Current Appraisal Document icon from the gutter (right hand sidebar)

Logged in as Michael Scott

Return as Administrator: Michael Scott

Employee Manager Administrator Logout

Task List Appraisals Notes My Employees Track Goals

My Employees Andy Bernard

**Andy Bernard**

Employee #	1007	Email Address	nobody@promantek.com
Date of Hire	12/13/2011	Login ID	abernard
Password	*****	Roles	Manager Employee

Employee Data

CURRENT APPRAISAL

Period: 7/26/2012 - 12/13/2012  
Appraisal Due Date: 12/13/2012  
Manager: Michael Scott

DRAFT APPRAISAL

4

Select "Add a Goal" on the Appraisal.

(Manager Role)

Logged in as Michael Scott

Return as Administrator: Michael Scott

Employee Manager Administrator Logout

Task List Appraisals Notes My Employees Track Goals

Performance Appraisal

**Annual Appraisal for Andy Bernard**

Position Description  
Regional Director in Charge of Sales

**Add a goal**

**Core Values Section** 25%  
Core Values for all Dundermifflin employees

**Cooperation** 50%  
Cooperates with others to accomplish goals, treats others with dignity and respect and value the contributions of others.

Measurements (0) Add Measurement

Notes (1)  
Michael Scott 42 minutes ago  
Andy, you are so, so, so...well. Anyway.  
Edit Delete

Bernard, Andy

Period: 7/26/2012 - 12/13/2012  
Appraisal Due Date: 12/13/2012  
Manager: Michael Scott

**Performance Appraisal**

- Core Values Section
- Cooperation
- Conflict Management
- Sales Section
- Manager Relationships
- Flexibility
- Areas for Improvement
- Strengths
- General Notes

## Add Goal to a Subordinate's Appraisal, continued

5

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.

6

Select the location of the goal on the Appraisal form.

**Add a goal**

Where would you like to insert this goal?  
 Lead Project ABC

☐ Top of appraisal  
☐ In section: Core Values Section  
☐ In section: Sales Section  
☒ Bottom of appraisal

7

Now, the Employee's 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.

**Flexibility** 16.7%

Open to change and new information. Able to adapt behavior and work methods in response to changing conditions.

Measurements (0) [Add Measurement](#)

Notes (0)

**Areas for Improvement**

List areas for improvement.

Notes (0)

**Strengths**

List strengths.

Notes (0)

**Lead Project ABC** added by Michael Scott 4%

Be the project lead for Project ABC and see it through to completion.

Measurements (0) [Add Measurement](#)

Notes (0)

**Performance Appraisal**

- Core Values Section
- Cooperation
- Conflict Management
- Sales Section
- Manager Relationships
- Flexibility
- Areas for Improvement
- Strengths
- Lead Project ABC
- General Notes

## Add Measurement to your own Appraisal

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><b>In Progress</b></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 to your own Appraisal, 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  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.

## Add Measurement to a Subordinate's Appraisal

1

For 3 weeks following an Appraisal, an Employee's Appraisal Document will be in the "Set Goals and Take Notes" phase (see Dorothy Gale here.)

(Manager Role)

Employee	Due	Action
<b>Appraisals (5)</b>		
Eyre, Jane	8/27/2012	Score Appraisal
Halpert, Jim	7/26/2012	Score Appraisal
Kapoor, Kelly	7/26/2012	Score Appraisal
Philbin, Darryl	7/26/2012	Score Appraisal
Schrute, Dwight	8/21/2012	Score Appraisal
<b>Approve Appraisals (1)</b>		
Kapoor, Kelly	7/26/2012	Approve or Reject
<b>Self-Appraisal (1)</b>		
Scott, Michael	7/26/2012	Score Appraisal
<b>Set Goals and Add Notes (1)</b>		
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

Select an Employee for whom you wish to add a measurement from the My Employees tab on the Navigation Bar, if the Employee is not in the Goals and Notes phase in the Task List.

(Manager Role)

Name	Manager	Employee #	Position	Next Appraisal	Date of Birth
Bernard, Andy	Scott, Michael	1007	Regional Director in Ch...	12/13/2012	12/13/20...
Bratton, Creed	Scott, Michael	1006	Quality Assurance	1/1/2013	1/1/2011
Eyre, Jane	Scott, Michael	1003	Customer Service Repr...	8/27/2012	12/8/201
Gale, Dorothy	Scott, Michael	1008	Account Executive	3/4/2013	3/4/2012
Halpert, Jim	Scott, Michael	1005	Assistant Regional Man...	7/26/2012	2/21/201
Kapoor, Kelly	Scott, Michael	1009	Customer Service Rep	7/26/2012	4/10/201
Philbin, Darryl	Scott, Michael	1010	Warehouse Foreman	7/26/2012	9/28/200
Schrute, Dwight	Scott, Michael	1004	Test Position	8/21/2012	4/2/2009

## Add Measurement to a Subordinate's Appraisal, continued

3

You will be taken to the employee record if you are adding a Measurement more than 3 weeks after the last Appraisal.

Select the Current Appraisal Document icon from the gutter (right hand sidebar)

Logged in as Michael Scott Return as Administrator: Michael Scott

TRAKSTAR

Employee Manager Administrator Logout

Task List Appraisals Notes My Employees Track Goals

My Employees Andy Bernard

Andy Bernard

Employee #	1007	Email Address	nobody@promantek.com
Date of Hire	12/13/2011	Login ID	abernard
Password	*****	Roles	Manager Employee

Employee Data

CURRENT APPRAISAL

Period: 7/26/2012 - 12/13/2012  
Appraisal Due Date: 12/13/2012  
Manager: Michael Scott

DRAFT APPRAISAL

4

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.



## Add Measurement to a Subordinate's Appraisal, continued

5

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

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

▼ Notes (0)

Add a note...

6

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: 1 Days before Due Date [X](#) [+](#)

To: C

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.



## Create a Draft Appraisal for a Subordinate

1

Select the employee for whom you wish to create a Draft Appraisal from the Navigation Bar.

Find the "Create Draft Appraisal" button in the gutter (right hand sidebar.)

Logged in as Michael Scott

TRAKSTAR

Employee Manager Logout

Task List Appraisals Notes My Employees Track Goals

My Employees Jane Eyre

**Jane Eyre**

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

Manager Scott, Michael Appraisal Process default

Position Customer Service Representative Base Date 12/8/2010

Next Appraisal Due 8/27/2012

Employee Data

CURRENT APPRAISAL

Period: 12/8/2010 - 8/27/2012  
Score: 5.2  
Appraisal Due Date: 8/27/2012 ▶ more

DRAFT APPRAISAL

[+ Create Draft Appraisal](#)

Additional Info

Created July 26 at 11:00pm

2

A Draft Appraisal is created under the current Appraisal.

Select the Draft Appraisal.

Employee Manager Logout

My Employees Track Goals

**Jane Eyre**

Email Address	nobody@promantek.com
Login ID	jeyre
Roles	Employee

Appraisal Process default

Base Date 12/8/2010

Employee Data

CURRENT APPRAISAL

Period: 12/8/2010 - 8/27/2012  
Score: 5.2  
Appraisal Due Date: 8/27/2012 ▶ more

DRAFT APPRAISAL

Period: 8/27/2012 - 12/8/2012  
Appraisal Due Date: 12/8/2012  
Manager: Michael Scott ▶ more

### Helpful Information

Draft Appraisals are perfect when you are already thinking about next year's Appraisal, but you haven't yet completed the current Appraisal cycle.

If you would like to get ahead of the curve, create a draft Appraisal with future goals. The Draft Appraisal will take effect immediately upon archive of the current Appraisal.

## Create a Draft Appraisal for a Subordinate, continued

③

You'll see a familiar form.

It will be blank.

Add goals and measurements as desired.

The Draft Appraisal will sit in limbo until the current Appraisal is archived.

Upon archive, the Draft Appraisal will become the Current Appraisal.

Trakstar Manager interface showing the 'Performance Appraisal' form for Jane Eyre. The user is logged in as Michael Scott. The form includes a 'Task List' with 'Appraisals' selected, and tabs for 'Notes', 'My Employees', and 'Track Goals'. The appraisal is for Jane Eyre, with a position description of 'Responsible for Customer Service'. It shows a 'Customer Service' goal with a score of 33.3%. The form is currently blank, with buttons to 'Add goal' and 'Add Measurement'. A sidebar on the right shows the employee's name, period (8/27/2012 - 12/8/2012), due date (12/8/2012), and manager (Michael Scott).

②

For the Draft Appraisal to become the current Appraisal, you must archive the current Appraisal.

(In order to Archive, you must Route for Approval if necessary.)

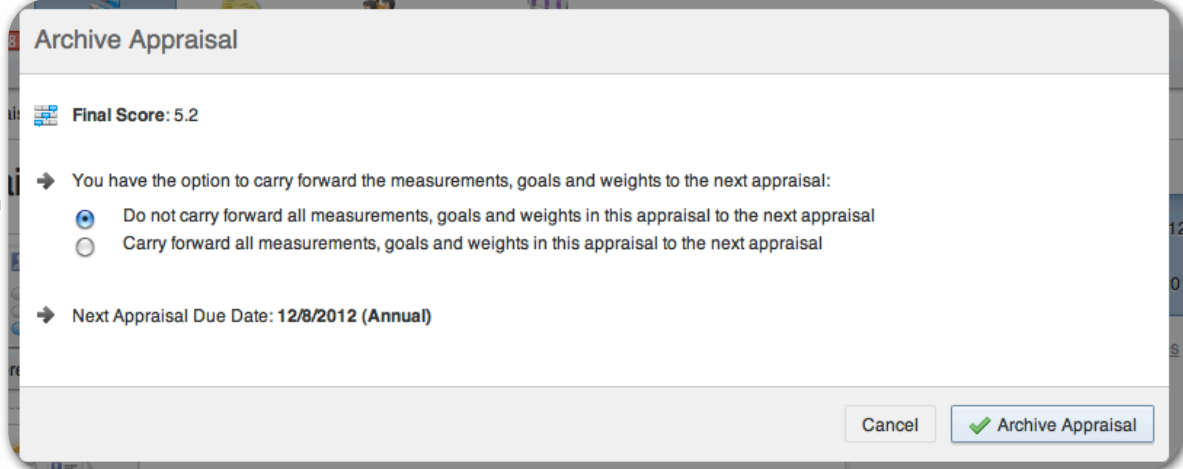
Trakstar Manager interface showing the 'Appraisal Workshop' for Jane Eyre. The user is logged in as Michael Scott. The workshop includes sections for 'Score Appraisal' (100% complete, 5.2 score), 'Compare Appraisal Scores Report' (Coming soon...), 'Route For Approval' (Progress: Not yet started), and 'Archive Appraisal' (Print Appraisal button). A 'Show Appraisal Workshop Logs' link is at the bottom.

## Create a Draft Appraisal for a Subordinate, continued


3

While Archiving, you will be presented with two choices.

If you have created a Draft, choose the top radio button, "Do not carry forward..."



**Archive Appraisal**

 **Final Score: 5.2**

→ You have the option to carry forward the measurements, goals and weights to the next appraisal:

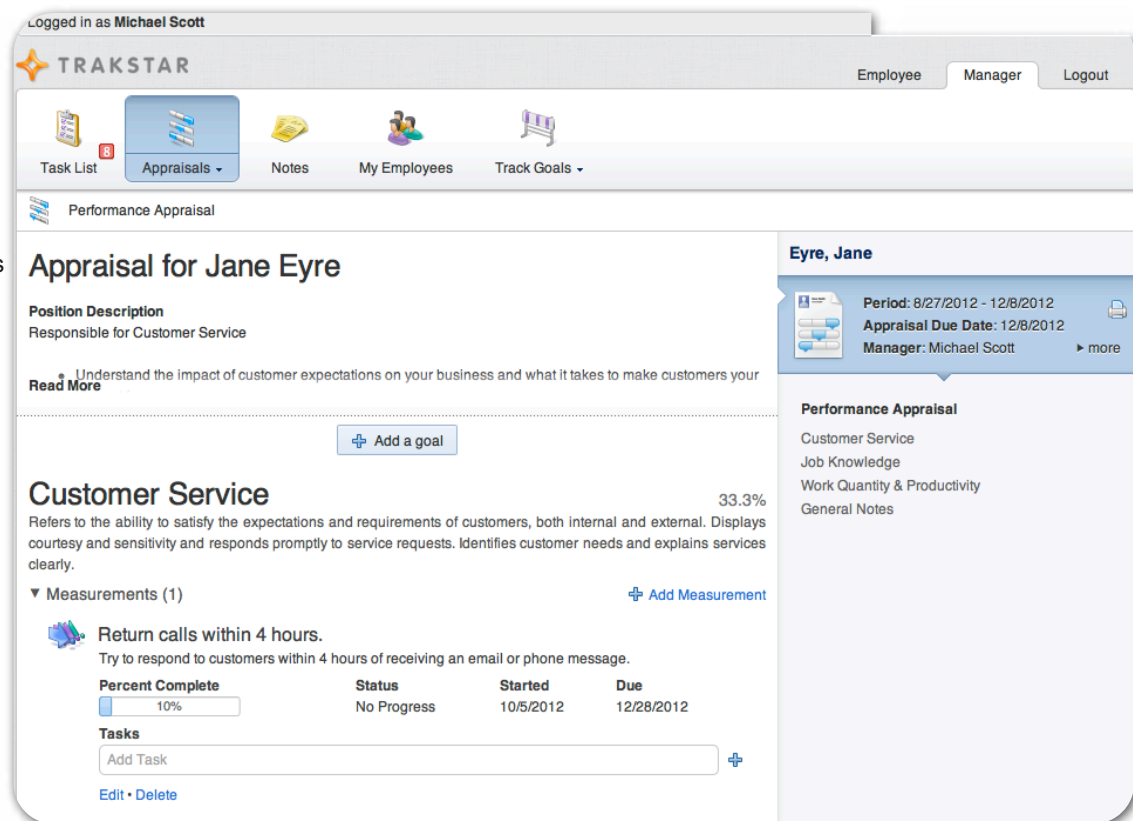
- ☒ Do not carry forward all measurements, goals and weights in this appraisal to the next appraisal
- ☐ Carry forward all measurements, goals and weights in this appraisal to the next appraisal

→ Next Appraisal Due Date: **12/8/2012 (Annual)**

[Cancel](#) [✓ Archive Appraisal](#)

4

The Draft Appraisal with the new goals and measurements you have set will now become the current Appraisal document.



Logged in as Michael Scott

**TRAKSTAR** Employee Manager Logout

Task List Appraisals Notes My Employees Track Goals

Performance Appraisal

### Appraisal for Jane Eyre

**Position Description**  
Responsible for Customer Service

[Read More](#) Understand the impact of customer expectations on your business and what it takes to make customers your


[Add a goal](#)

### Customer Service

33.3%

Refers to the ability to satisfy the expectations and requirements of customers, both internal and external. Displays courtesy and sensitivity and responds promptly to service requests. Identifies customer needs and explains services clearly.

▼ Measurements (1) [Add Measurement](#)

 **Return calls within 4 hours.**  
Try to respond to customers within 4 hours of receiving an email or phone message.

Percent Complete	Status	Started	Due
<input type="text" value="10%"/>	No Progress	10/5/2012	12/28/2012

**Tasks**  
 [Add](#)

[Edit](#) [Delete](#)

**Eyre, Jane**

**Period:** 8/27/2012 - 12/8/2012  
**Appraisal Due Date:** 12/8/2012  
**Manager:** Michael Scott [more](#)

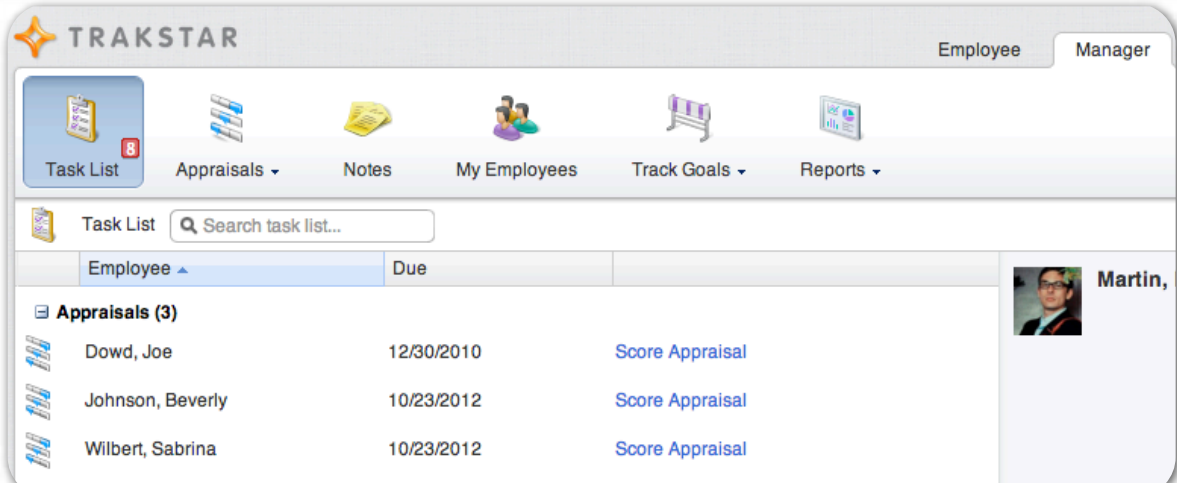
**Performance Appraisal**  
Customer Service  
Job Knowledge  
Work Quantity & Productivity  
General Notes

## Invite Multi-Raters to provide Feedback on a Employee

1

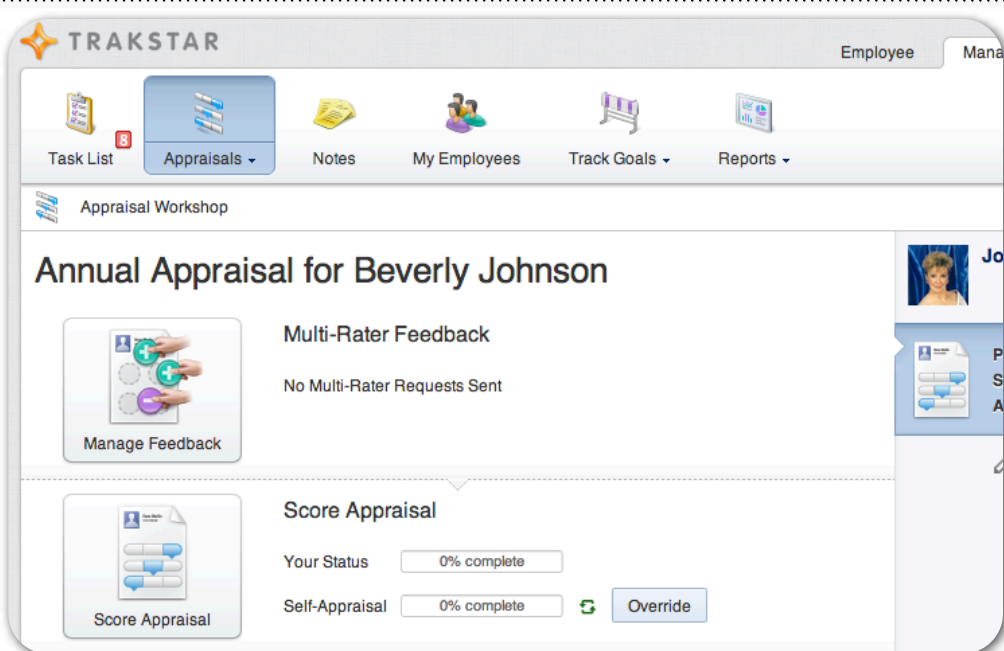
Log in as a Manager.

Locate the Appraisal (Appraisal must be inside the scoring window) for which you wish to request Multi-Rater feedback.



2

Select the Manage Feedback button.



## Invite Multi-Raters to provide Feedback on a Employee, continued

3

Select the name of a Multi-rater.

Select additional names if desired.

Determine the elements on which you would like Multi-Rater feedback.

If you wish for the feedback you receive to be anonymous, click the checkbox at the bottom.\*

Save Multi-Raters when done.

\*Feedback is ALWAYS anonymous to the employee.

**TRAKSTAR**

Employee

Task List Appraisals Notes My Employees Track Goals Reports

Appraisal Workshop Multi-Rater

**Multi-Rater Feedback**

Select a Multi-Rater

Select name

Select additional names

Choose elements to include in Multi-Rater reviews.

- ☒ Core Values Section
  - ☒ Respect for Others
  - ☒ Attendance
- ☒ Management Section
  - ☒ Accuracy
  - ☒ Efficiency
- ☒ Customers First
- ☒ Areas for Improvement
- ☒ Strengths

Select the elements on which a Multi-Rater may provide feedback

☐ Check to make all feedback anonymous

If you wish for feedback to be anonymous, click here.

Save when done

Save Multi-Raters

4

Add special instructions to the Multi-Raters if desired.

**Multi-Rater Instructions**

Text entered here will be added to the email instructions received by each Multi-Rater (optional).

Cancel Save Multi-Raters

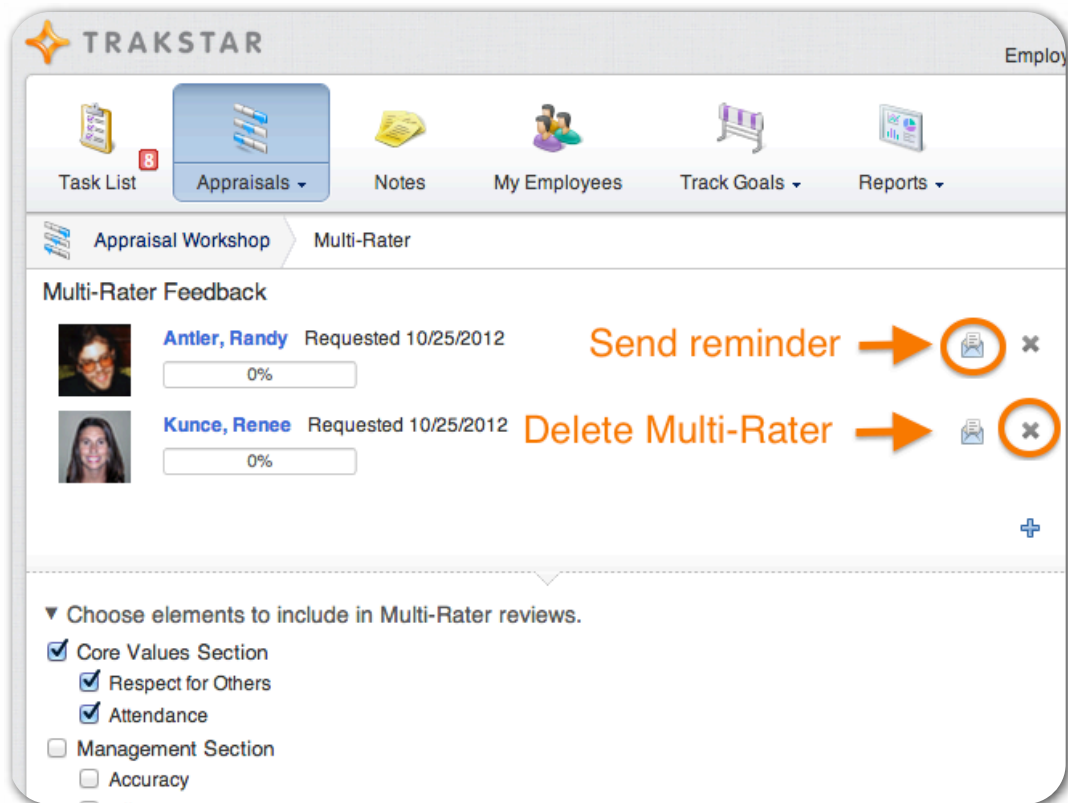
## Invite Multi-Raters to provide Feedback on a Employee, continued

5

Status indicators will show the progress of Multi-Raters that have been invited to provide feedback.

Send a reminder to a Multi-Rater if the request was issued, but the Multi-Rater has not responded.

Delete a Multi-Rater if desired.





TRAKSTAR



Employ

Task List Appraisals Notes My Employees Track Goals Reports

Appraisal Workshop Multi-Rater

Multi-Rater Feedback

 **Antler, Randy** Requested 10/25/2012 0% **Send reminder** →  ×

 **Kunc, Renee** Requested 10/25/2012 0% **Delete Multi-Rater** →  ×

+

▼ Choose elements to include in Multi-Rater reviews.

- ☒ Core Values Section
  - ☒ Respect for Others
  - ☒ Attendance
- ☐ Management Section
  - ☐ Accuracy

## View Multi-Rater Feedback

1

Log in as a Manager.

Locate the Appraisal for which you wish to view incoming Multi-Rater feedback.

The screenshot shows the Trakstar Manager interface. At the top, there's a navigation bar with the Trakstar logo and tabs for Employee and Manager. Below this is a menu bar with icons for Task List, Appraisals, Notes, My Employees, Track Goals, and Reports. The Appraisals section is active, showing a search bar and a table of appraisals. The table has columns for Employee, Due date, and a link to Score Appraisal. Three appraisals are listed: Dowd, Joe (12/30/2010), Johnson, Beverly (10/23/2012), and Wilbert, Sabrina (10/23/2012). A profile picture of Martin is visible on the right.

Employee	Due	
<b>Appraisals (3)</b>		
Dowd, Joe	12/30/2010	<a href="#">Score Appraisal</a>
Johnson, Beverly	10/23/2012	<a href="#">Score Appraisal</a>
Wilbert, Sabrina	10/23/2012	<a href="#">Score Appraisal</a>

2

You'll see a quick status update on the Multi-Rater feedback next to the Manage Feedback button.

Select Manage Feedback.

The screenshot shows the Trakstar Manager interface with the Appraisals section active. A message indicates 'Switched to the Manager role.' Below this, the 'Annual Appraisal for Joe Dowd' is displayed. A 'Manage Feedback' button is shown with a status update: 'Multi-Rater Feedback' and '2 Multi-Rater Requests Sent'. A progress bar indicates '50% Responded'.

**Annual Appraisal for Joe Dowd**

**Multi-Rater Feedback**

2 Multi-Rater Requests Sent

50% Responded



## View Multi-Rater Feedback, continued

3

Responders and their status is revealed.

View the feedback of a responder in isolation by clicking view feedback.

4

You may wish to view the View the Multi-Rater feedback on the actual Appraisal form. Click Score Appraisal.



## View Multi-Rater Feedback, continued

5

Hover on the Rating Bar to reveal the Multi-Rater feedback on the Actual Appraisal form. Comments from Multi-Raters are revealed below in the comments section.

### Core Values Section

Core Values for all Dundermifflin employees

24%

### Respect for Others

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

50%

Randy Antler

Not Effective	Minimally Effective	Effective	Highly Effective	Exceptional
---------------	---------------------	-----------	------------------	-------------

Satisfactorily meets job requirements.

► Measurements (10)

▼ Comments (1)



**Randy Antler** 4 minutes ago  
Joe is great to work with.

## Helpful Information

Multi-Rater Feedback is always anonymous to the employee. The feedback provided by colleagues is not visible to the employee, unless a manager *deliberately* shares the information. This is by design. Multi-Raters are provided with a safe place to provide honest, thoughtful opinions.

Additionally, Multi-Rater feedback does not affect the overall Appraisal score of an employee. Ratings from Multi-Raters are not calculated in the final Appraisal score.

Organizations may, at the Administrative level of Trakstar, decide that all Multi-Rater feedback will be anonymous. Or, organizations may elect to leave the choice of anonymity in the hands of the manager. If a manager chooses to make Multi-Rater feedback anonymous, it means that the manager will not be able to associate names with ratings or comments.

Again, Multi-Rater feedback never visible to the employee.