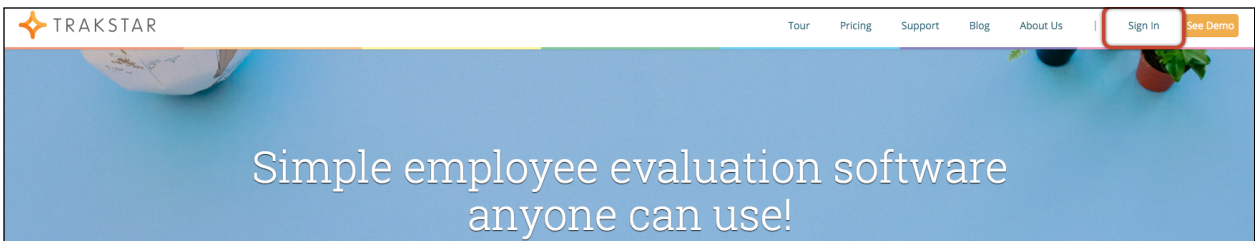


# Employee Guide

# Log In

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

Click **Sign In** on the top right of the screen.



## 2. Input Company Name, Username, and Password.

Passwords are case sensitive.

A screenshot of the Trakstar login form. It features the Trakstar logo at the top. Below it are three input fields labeled 'COMPANY NAME', 'USERNAME', and 'PASSWORD'. The 'PASSWORD' field has a red border. Below the input fields is a 'Stay logged in' checkbox. At the bottom is a large orange 'Log in' button and a smaller 'Help! I can't log in' button.

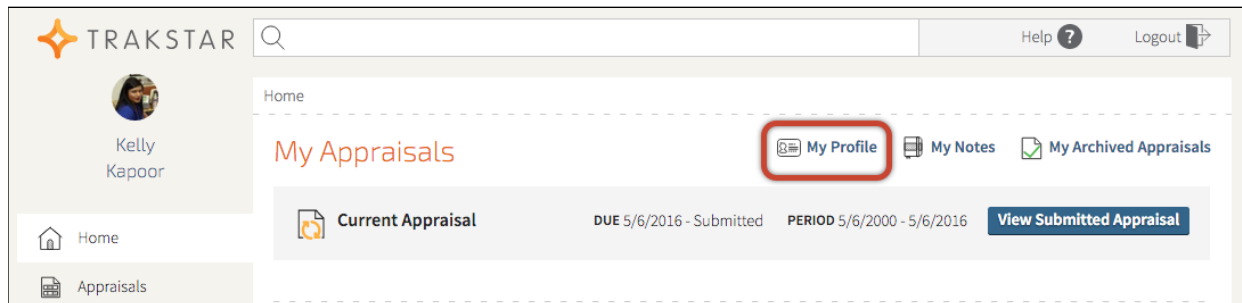
### FORGOT YOUR PASSWORD?

Click the button under the login details: **“Help! I can’t log in”**

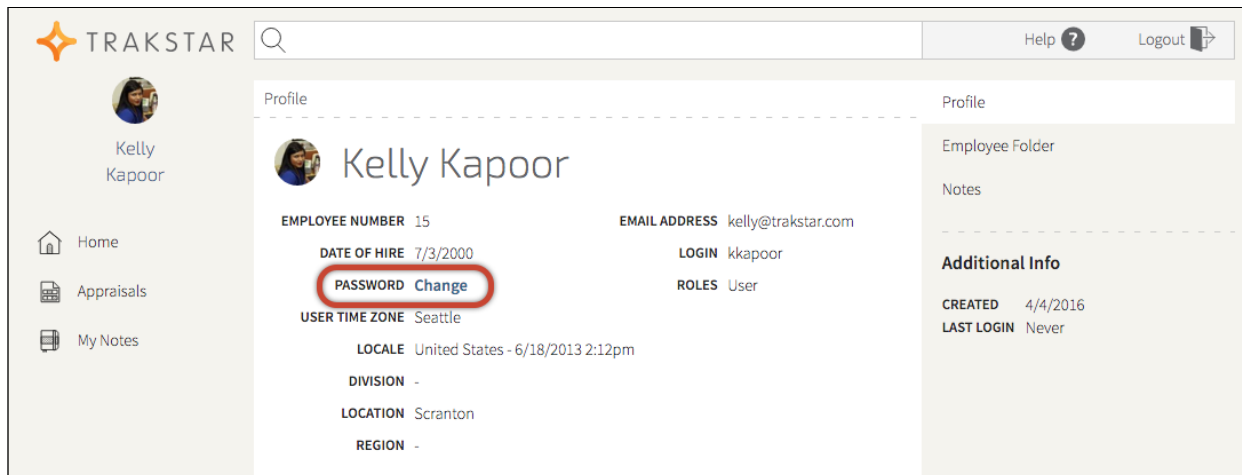
We’ll send you an email that contains a personalized link to reset it.

# Change Your Password

## 1. Click My Profile



## 2. Click Change



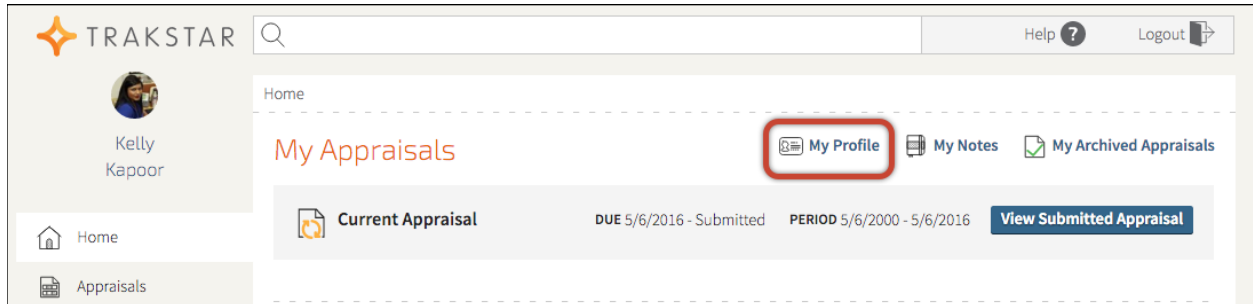
## 3. Type In Information Required

You are required to fill in your old password, new password, and to verify the new password.

The screenshot shows the 'Change Password' form. It contains four input fields: 'OLD PASSWORD', 'NEW PASSWORD', 'VERIFY PASSWORD', and a 'SHOW PASSWORDS' checkbox. At the bottom right, there are two buttons: 'Cancel' and 'Change Password'.

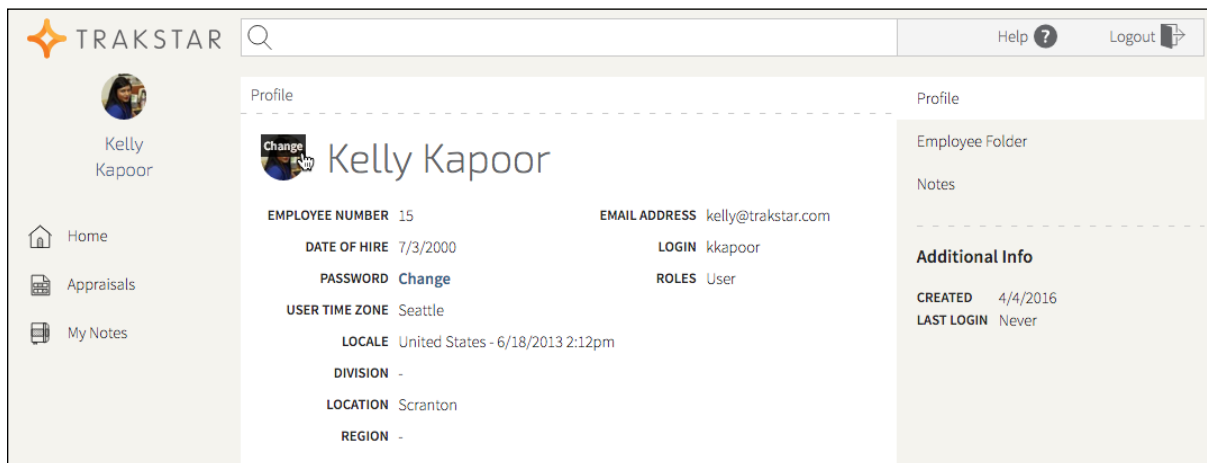
# Upload or Change Your Photo

## 1. Click My Profile



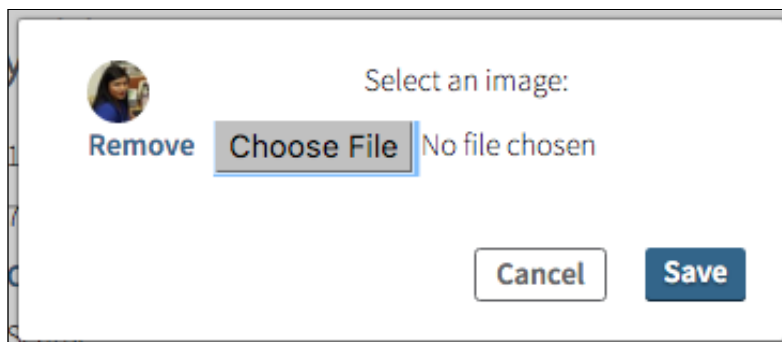
## 2. Hover Over Your Photo

Click on “Change” to change your photo



## 3. Choose an Image From Your Computer

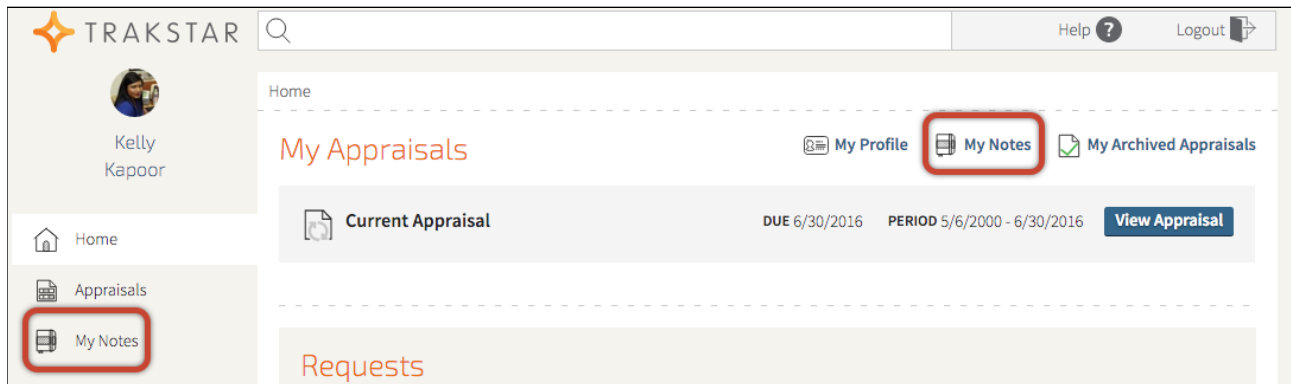
It's a thumbnail - a 16x16 picture works best. Click 'Save' to finalize changes.



# Take a Note on Your Appraisal

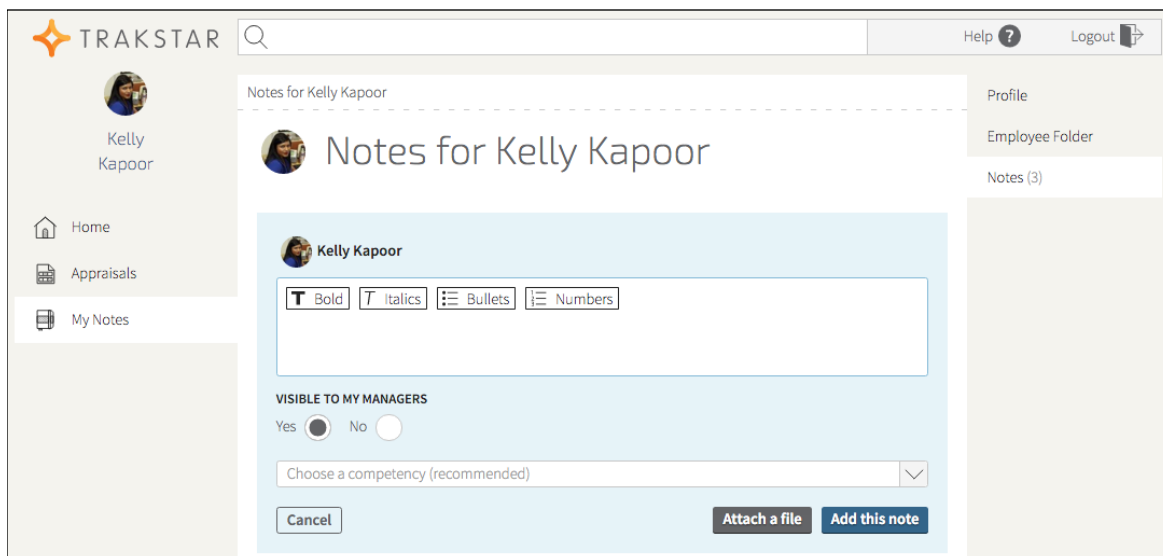
## 1. Select My Notes from the Homepage

You can find 'My Notes' in the navigation bar and above your appraisals.



## 2. Input Your Note

Enter your note in the text box and select a privacy setting to determine if the note will be visible to your manager. Select a competency that this note is related to. If no competency is selected, your text will be placed in the General Notes section. You may also attach a file (Customer Letter, Certificate etc.). Save by clicking **Add This Note**.



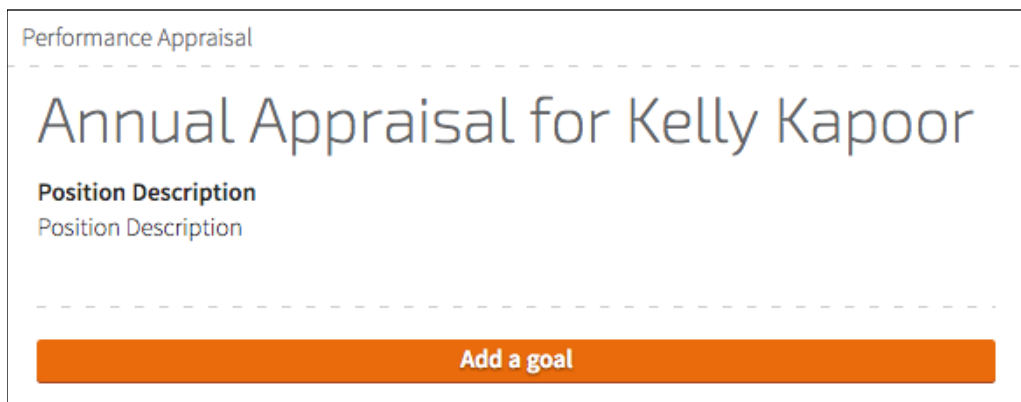
# Add a Goal to Your Appraisal

## 1. Click Set Goals under Current Appraisal

If your Appraisal is in scoring, this button will say “score appraisal”. You will need to click “**manage goals and notes**” on the next page to add goals to your appraisal.



## 2. Click Add a Goal



### HELPFUL INFORMATION

If employee Goal Setting is enabled, you will see an “Add a Goal” button. Managers may have the ability to set goals too.

If not you will be able to add a Measurement which is attached to a competency. Goals are big picture competencies that are set specifically for an individual to focus on.

Goals are eventually scored and can carry weight on the overall appraisal.

### 3. Add an Existing Goal, or Create a New One

Fill in the name of the goal and a description if desired. Select the appropriate rating scale. **Save Goal** when done.

**Add a goal**

☐ Add an existing goal  
☒ Create a new goal

**GOAL NAME**  
Name

**GOAL DESCRIPTION**  
T Bold T Italics ☰ Bullets ☰ Numbers

**Rating Scale**  
Select a Rating Scale  
Select a Rating Scale  
default  
Default Scale

Cancel Save Goal

### 4. Select the Location of the Goal

Select **Insert Goal** once you have selected the section for the Goal. Typically there will only be one option here however, your organization may have multiple goal sections.

**Add a goal**

Implement Trakstar Software

☒ In section: Goals

Cancel Insert Goal



PLEASE NOTE: Now, your new goal shows up as a line item that will be scored during your next evaluation.

# Edit or Remove a Goal

## 1. Hover your mouse Over the Goal

The **Trash Can** icon will remove the goal. The **Edit Pencil** will allow you to make changes.

**Implement Trakstar Software** added by Kelly Kapoor



33.3%

Implement Trakstar Software

Needs Work

Doing Okay

Great Work

Measurements (0)

+ Add Measurement

Notes (0)

Add a note...

## 2. Editing Your Goal

If **Edit** is selected, the content of the goal can be edited and the weight of the goal can be adjusted. Adjusting the weight of the goal will most likely have mathematical consequences on

**Editing: Implement Trakstar Software** WEIGHT (0-100)  33.3%

Implement Trakstar Software

Edit this goal

Cancel

Save



# Add a Measurement to Your Appraisal

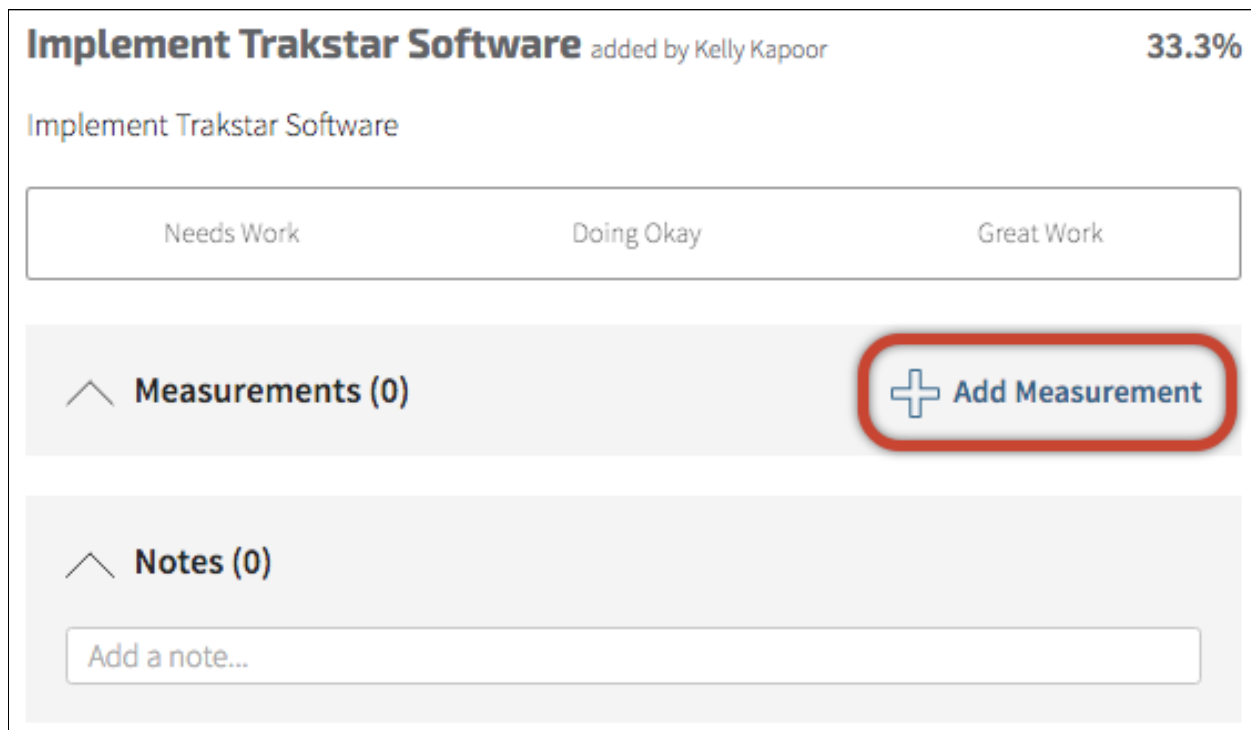
## 1. Click Set Goals or View Appraisal under the Current

If your Appraisal is in scoring, this button will say “score appraisal”. You will need to click “**manage goals and notes**” on the next page to add goals to your appraisal.



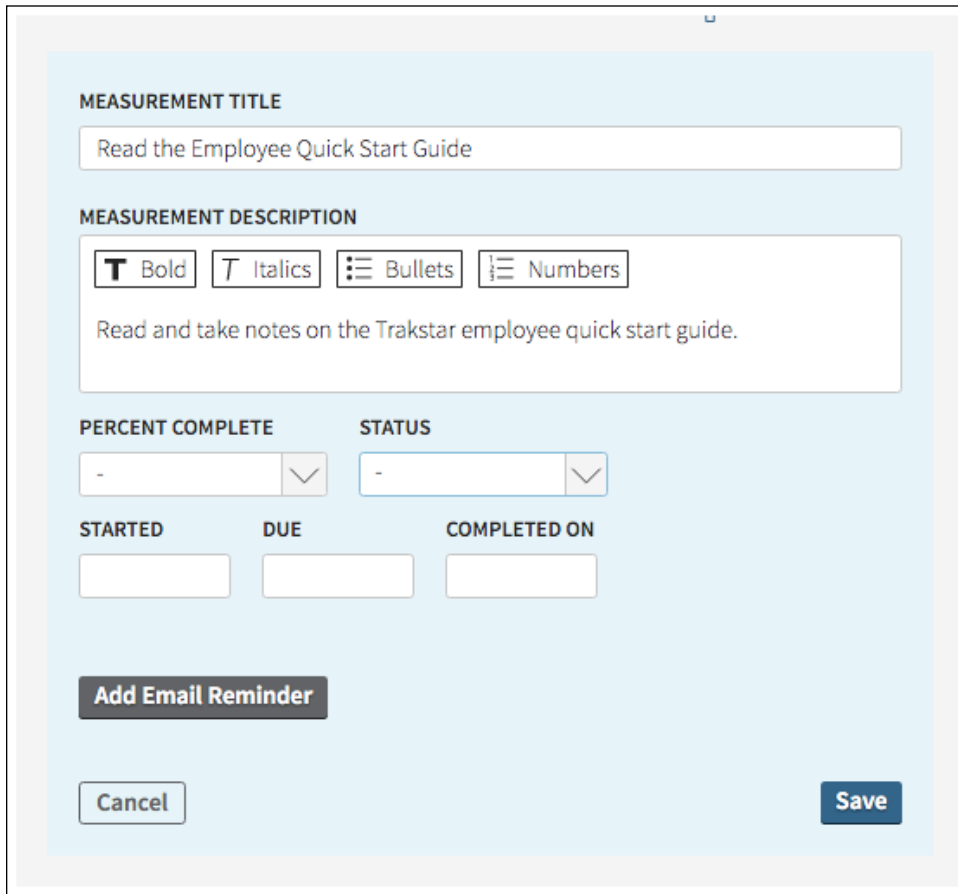
## 2. Locate Where You Want to Add a Measurement

Measurements can be added to a competency or a goal. Click **Add Measurement** when you're ready to add a measurement.



### 3. Fill in the Measurement Fields

Only the 'Measurement Title' is a required field. This is a great place for any SMART details you would like to include. Finish by clicking **Save**.



The screenshot shows a web form for creating a measurement. It has a light blue background with white input fields and buttons. The form is titled 'MEASUREMENT TITLE' and 'MEASUREMENT DESCRIPTION'. The 'MEASUREMENT TITLE' field contains the text 'Read the Employee Quick Start Guide'. The 'MEASUREMENT DESCRIPTION' field has a rich text editor with buttons for Bold, Italic, Bullets, and Numbers, and the text 'Read and take notes on the Trakstar employee quick start guide.' Below these are two dropdown menus for 'PERCENT COMPLETE' and 'STATUS', both set to '-'. There are three date input fields for 'STARTED', 'DUE', and 'COMPLETED ON'. At the bottom, there is a dark grey button 'Add Email Reminder', a light grey button 'Cancel', and a dark blue button 'Save'.

**MEASUREMENT TITLE**

Read the Employee Quick Start Guide

**MEASUREMENT DESCRIPTION**

**B** Bold **I** Italic **B** Bullets **N** Numbers

Read and take notes on the Trakstar employee quick start guide.

**PERCENT COMPLETE** **STATUS**

- -

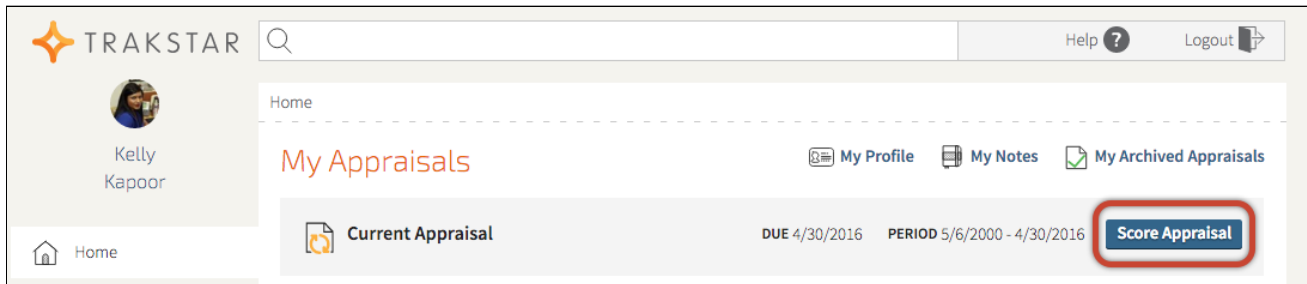
**STARTED** **DUE** **COMPLETED ON**

**Add Email Reminder**

**Cancel** **Save**

# Score Your Self-Appraisal

## 1. Click Score Appraisal on the home page



## 2. Select a Score for each Competency

Use the Rating Scale bar to pick your score.

| Initiative  |                     | 33.3%     |                  |             |
|---|---------------------|-----------|------------------|-------------|
| Identifies opportunities and issues, proactively acts and follows through on work activities to resolve or capitalize on them.  |                     |           |                  |             |
| Not Effective   | Minimally Effective | Effective | Highly Effective | Exceptional |
| Identifies opportunities and issues, proactively acts and follows through on work activities to resolve or capitalize on them. Works independently with little direction. |                     |           |                  |             |

### HELPFUL INFORMATION

Your current appraisal will enter the scoring window at your organization's designated evaluation time. At that time, your current appraisal button will change from "Set Goals" to "Score Appraisal" and you can begin scoring.

### 3. Add Comment if Desired


Save comments by clicking **Add This Comment**. Comments are optional and can include an attachment that will be linked with the appraisal.


**Initiative** 33.3%


Identifies opportunities and issues, proactively acts and follows through on work activities to resolve or capitalize on them.

|               |                     |                  |                  |             |
|---------------|---------------------|------------------|------------------|-------------|
| Not Effective | Minimally Effective | <b>Effective</b> | Highly Effective | Exceptional |
|---------------|---------------------|------------------|------------------|-------------|

Identifies opportunities and issues, proactively acts and follows through on work activities to resolve or capitalize on them. Works independently with little direction.

 **Notes (1)**

 **Comments (1)**

 **Kelly Kapoor**

**T** Bold

*T* Italics

- 

 Bullets

- 

 Numbers

I always take initiative on new projects, volunteering to take on whatever needs to get done. I am highly effective at taking initiative.

Cancel

**Save this comment**

#### HELPFUL INFORMATION

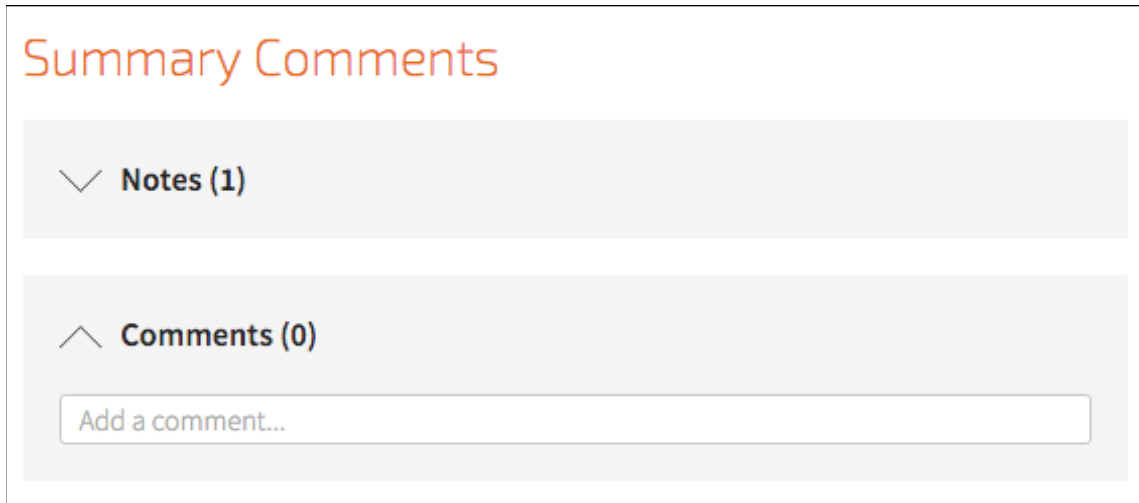
If you have taken notes throughout the 'Goals and Notes' period, you can review your notes within the notes section. You are also able to copy the notes to comments and edit them to be seen with your final, scored appraisal.

### 4. Answer Open-Ended Questions

Trakstar requires an answer to all questions. To save, click **Save This Comment**.

## 5. Use Summary Comments for Final Thoughts

You can provide any attachments with summary comments as well. Summary comments are not required.



The screenshot shows a section titled "Summary Comments" in orange text. Below the title, there are two expandable sections. The first section, "Notes (1)", is collapsed and indicated by a downward arrow. The second section, "Comments (0)", is expanded and indicated by an upward arrow. Below the "Comments (0)" section, there is a text input field with the placeholder text "Add a comment...".

## 6. Send to Manager Upon Completion

Your manager can't see any self-appraisal information until you click **Send to Manager**. Also, the Self-Appraisal can't be edited once it has been sent to your manager.



The screenshot shows the "Kelly Kapoor Self Appraisal Form". The main title is "Annual Appraisal for Kelly Kapoor". Below the title, there is a "Position Description" section with a "Manage Goals and Notes" link. At the bottom, there are two status indicators: "0 Unsourced Competencies" and "0 Unanswered Questions". A red-bordered button labeled "Send to Manager" is highlighted in the bottom right corner.

# Provide Multi-Rater Feedback

## 1. Click Give Multi-Rater Feedback

If you are asked to provide Multi-Rater Feedback, you will receive an email and the request will appear on your **Home** page under **Requests**.

The screenshot shows the Trakstar Home page for user Kelly Kapoor. The page has a sidebar with links to Home, Appraisals, and My Notes. The main content area is titled 'My Appraisals' and includes a 'Current Appraisal' section with a due date of 4/30/2016 and a period of 5/6/2000 - 4/30/2016. Below this, there is a 'Requests' section. A request from Jim Halpert, dated 7 days ago, is shown with a red circle highlighting the 'Give Multi-Rater Feedback' button.

## 2. Complete the Request

Select a rating from the rating scale for each competency listed or you may have N/A as an option/ You can add comments as desired as well. The scores and comments are sent directly back to the requesting manager. You may also be asked to answer some open ended questions.

The screenshot shows the 'Initiative' competency rating scale. The scale has five options: Not Effective, Minimally Effective, Effective, Highly Effective (selected), and Exceptional. The current score is 33.3%. Below the scale, there is a description of the competency: 'Identifies opportunities and issues, proactively acts and follows through on work activities to resolve or capitalize on them.' and 'Actively seeks and identifies opportunities and issues, proactively acts and follows through on work activities to resolve or capitalize on them. Works independently. Maintains energy and focus towards achieving goals.' Below this, there is a 'Comments (1)' section. A comment from Kelly Kapoor, dated 7 days ago, is shown: 'Jim shows great initiative in all projects - he is a real inspiration.' There is an 'Add a comment...' input field at the bottom.

### 3. Click **Send to Manager** when Completed

When all competencies have been scored, and all the questions have been answered, you can click **Send to Manager** to complete Multi-Rater Feedback.

## 6 month interval Appraisal for Jim Halpert

Multi-Rater Feedback From Kelly Kapoor

**Position Description**  
Position Description

---

0 Unscored Competencies

0 Unanswered Questions

Decline Feedback

Send to Manager