

Trakstar Manager Glossary



All Subordinates	All employees below a manager in the company hierarchy.
Appraisal	A document, specific to an employee, which contains sections, competencies, goals and notes for a specific period. The appraisal document may be in one of several states (Future, Goal and Notes, Scoring, Archived, Unarchived).
Appraisal Due Date	The target date by which the Appraisal should be Archived by the manager. Prior to the Appraisal Due Date, self-appraisals (optional) and all approvals (optional) should be completed. *Note: Trakstar uses the Appraisal Due Date to calculate when an Appraisal is overdue. Appraisals not Archived by the Appraisal Due Date will be considered past due and Trakstar email notifications of delinquency may be sent.
Approve Appraisal	Ability of a Manager, Human Resources or other employee to view an appraisal completed by a manager and determine if it is ready to be presented to an employee. If an Appraisal is approved, it may be sent back to a Manager to Print or Archive. It is also possible that an Approved Appraisal can require additional approvals.
Approver	A person who Approves an Appraisal
Archive	Action taken by a manager to close an Appraisal that has been completed. The act of clicking "Archive" reveals the scored version of the Appraisal to the Employee.
Archived Appraisal	A past Appraisal that has been archived by a manager. The Appraisal is viewable by an Employee, Manager, and Administrator that has privileges to see it. If an Archived Appraisal needs to be edited for any reason, only the Trakstar Administrator may re-open the Appraisal for editing. At that time, it is considered an "Unarchived Appraisal".
Coaching Tips	Stock language to assist managers in providing feedback to employees on a Competency during the Scoring phase.
Competency	Performance indicator towards which an Employee strives to perform, e.g. Attendance, Leadership or Problem Solving. All Competencies must be rated for an evaluation to be considered complete.
Direct Reports	Employees that report directly to a Manager. In contrast, All Subordinates are employee that report directly or indirectly to a Manager.
Future Appraisal	An Appraisal document created in preparation for the next Appraisal Period. It is created by the Manager in order to set goals for the next appraisal period while the Employee is still in the current Period and has yet to Archive the current Appraisal.
Goal	A custom competency that a Manager (and sometimes an Employee) has the ability to add to an Appraisal Document. Goals are added on a specific Employee's form but can be Cascaded to other employees' Appraisal Documents. Goals will be scored once the appraisal enters the Scoring phase and can carry weight on the Overall Score.
Goals and Notes	An Appraisal state in which employees and manager may annotate the Appraisal Document with goals, measurements, and notes.

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Measurement	A custom description of a project, certification, or specific goal the Employee is to complete that a Manager and Employee have the ability to add to an Appraisal Document. Measurements are attached to an existing Competency or Goal on the form and are not scored and do not carry weight.
Multi-Rater	A peer (outside of the traditional Manager/Employee relationship) that provides feedback on the performance of a colleague.
Multi-Rater Feedback	The actual feedback provided by a peer on the performance of a colleague, requested and collected by the Manager. Multi-Rater feedback may be anonymous or not. Multi-Rater feedback is shared with an employee at the discretion of the manager but is not shared unless a manager deliberately takes action to share the feedback.
Navigation Bar	The set of icons across the top of the user interface presented to users upon log in.
Notes	The ability of Managers and Employees to take notes on accomplishments throughout the year on the Appraisal Document. Managers may take notes on Employees and Employees may take notes on themselves. Optionally, the Trakstar Administrator may enable the ability for all employees to take notes on one another.
Overall Appraisal Score	The final score that is associated with an Appraisal. Only the Manager score is used to determine Overall Score.
Period	The window of time on which an Appraisal is rated. The period can vary in time, depending on the needs of the organization and different employees can have different appraisal period lengths as needed.
Route for Approval	The digital path taken by an Appraisal after having been scored by the Manager to grander additional approvals inside an organization prior to the appraisal being Archived. Route for Approval settings are set by the Trakstar Administrator.
Scoring Appraisal	An Appraisal Document that is in the organization's designated Scoring window. During the time, the Manager and Employee are given the opportunity to score the appraisal and leave comments. (Some other features that may be utilized during the Scoring phase are Multi-Rater Feedback and Route for Approval)
Self-Appraisal	An appraisal that the employee conducts on him/herself in order to reflect upon job performance during the Appraisal period.
Unarchived Appraisal	An appraisal that was archived by the manager and was re-opened for editing by the Administrator. Ratings, comments and over-all scores may be modified but only after the Route for Approval has been Canceled (if it was approved by any approvers).