

# Employee Guide

# Log In

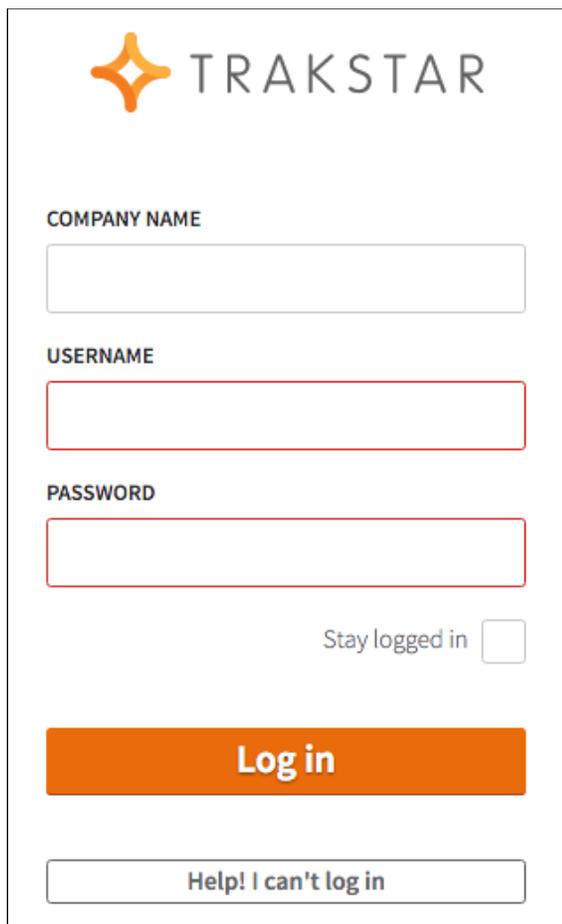
## 1. Navigate to [www.trakstar.com](http://www.trakstar.com)

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. At the top left is the Trakstar logo (an orange starburst) and the text "TRAKSTAR". Below the logo are three input fields: "COMPANY NAME", "USERNAME", and "PASSWORD". The "COMPANY NAME" field is empty. The "USERNAME" and "PASSWORD" fields have red borders. Below the "PASSWORD" field is a checkbox labeled "Stay logged in". At the bottom of the form is a large orange button labeled "Log in" and a smaller button labeled "Help! I can't log in".

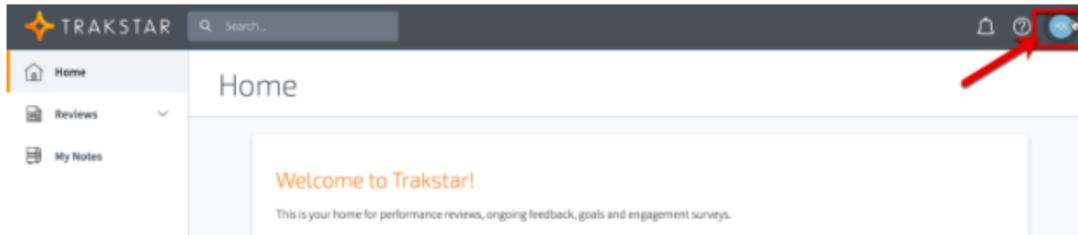
### FORGOT YOUR PASSWORD?

Click the button under the login details: "Help! I can't log in"

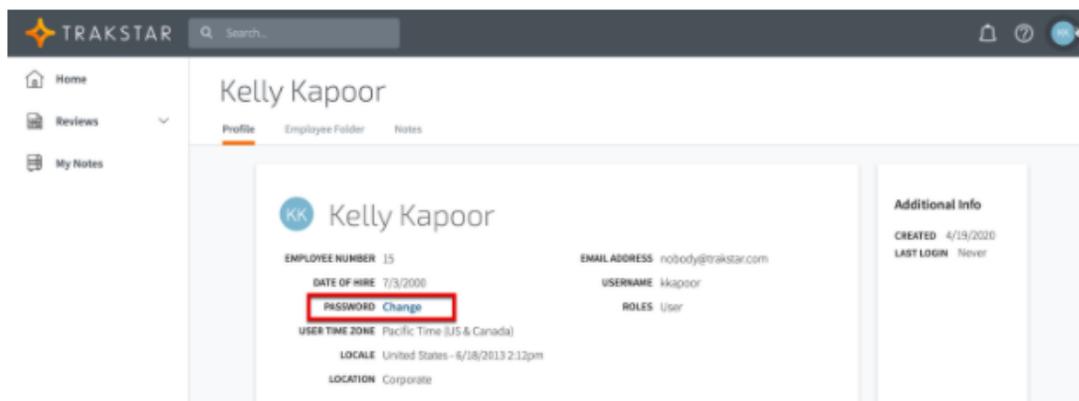
We'll send you an email that contains a personalized link to reset it.

# Change Your Password

## 1. Click on your initials or profile photo in the upper right corner



## 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.

### Change Password

CURRENT PASSWORD

NEW PASSWORD

VERIFY PASSWORD

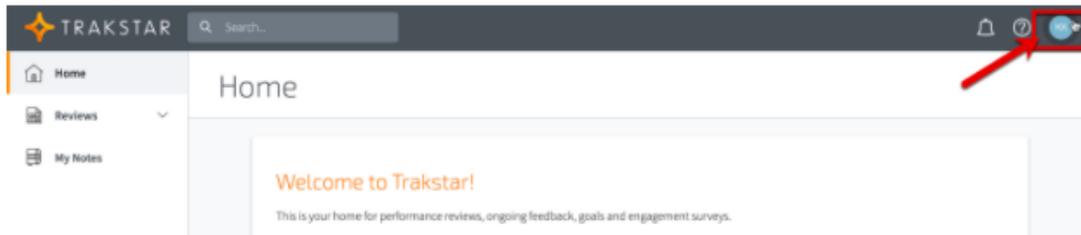
Show Passwords

Cancel

Change Password

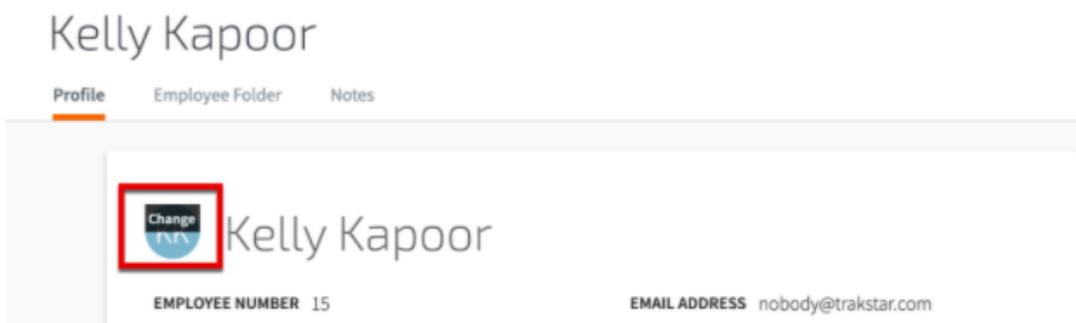
# Upload or Change Your Photo

1. Click your initials in the right-hand corner. Click on the 'Profile Settings' link from the dropdown.



## 2. Hover Over Your Photo or Initials

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.

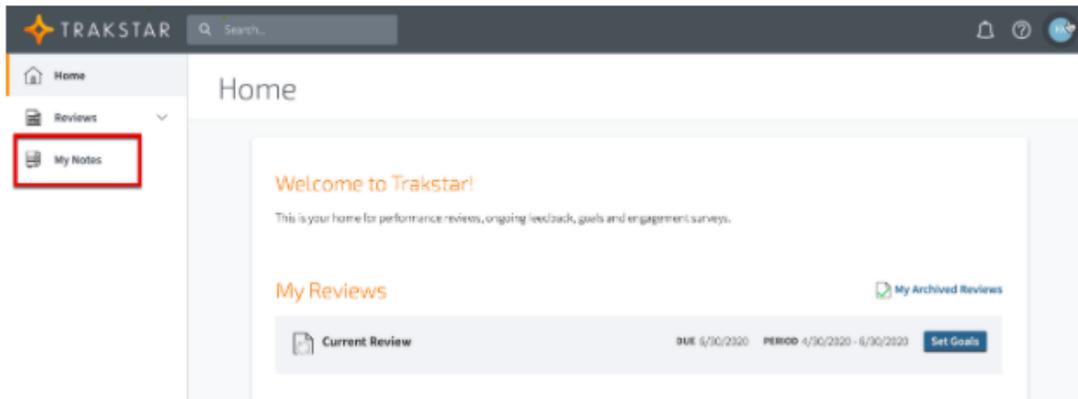
### Profile Image



# Take a Note on Your Review

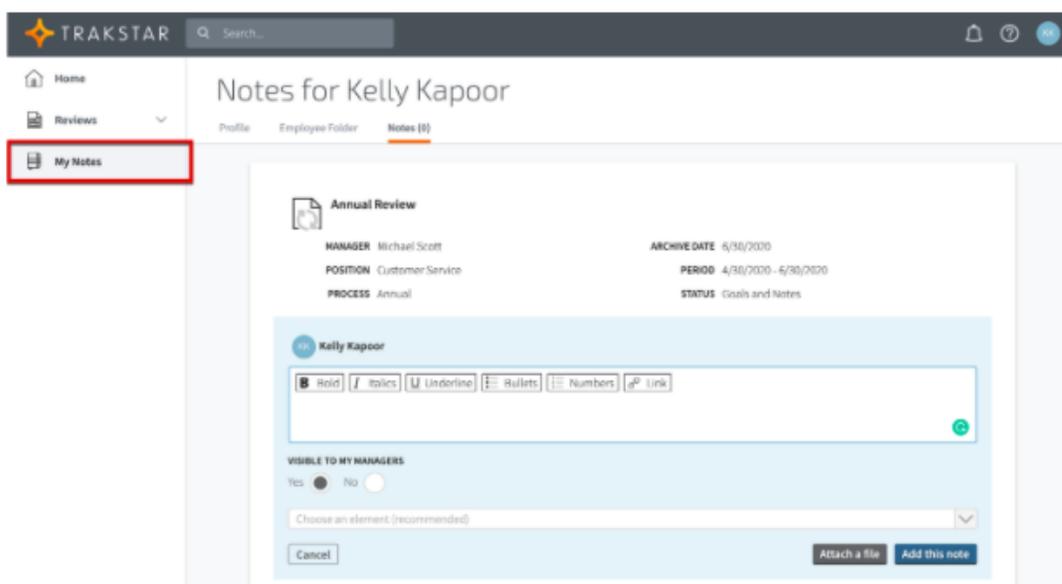
## 1. Select My Notes from the Homepage

You can find 'My Notes' tab on the left-hand side of your screen.



## 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.



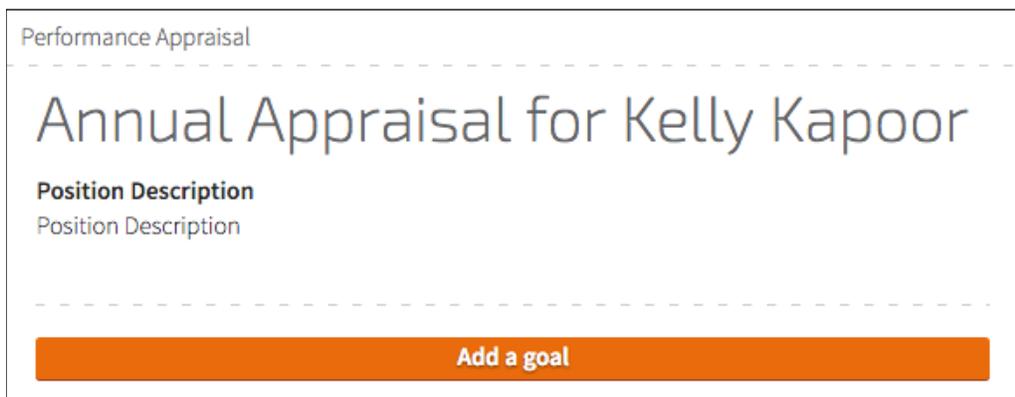
# Add a Goal to Your review

## 1. Click Set Goals under Current Review

If your Review is in scoring, this button will say "Score Review". Once inside your review hub, click on the "Goals and Notes" tab in the timeline.



## 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 (No goals found)  
 Create a new goal

##### GOAL NAME

##### GOAL DESCRIPTION

##### Rating Scale

### 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

##### Where would you like to insert this goal?

Project Management Certification

- In section: Goals

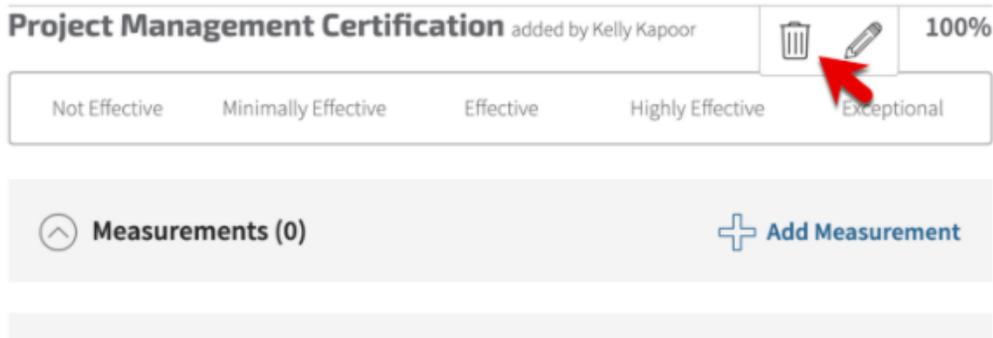


PLEASE NOTE: Now, your new goal shows up as a line item that will be scored during your next evaluation.

# 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.



## 2. Editing Your Goal

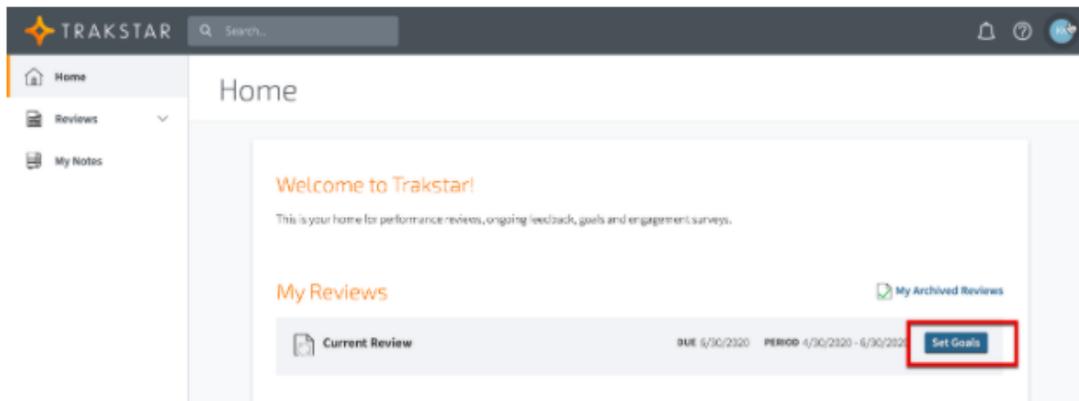
If Edit is selected, the content of the goal can be edited and the weight of the goal can be adjusted. Adjusting the weight of the goal will most likely have mathematical consequences on the score.



# Add a Measurement to Your review

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

If your Review is in scoring, this button will say "Score Review". Once inside your review hub, click on the "Goals and Notes" tab in the timeline.



## 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**.

**Project Management Certification** added by Kelly Kapoor 100%

Not Effective   Minimally Effective   Effective   Highly Effective   Exceptional

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Measurements (0) + Add Measurement

**MEASUREMENT TITLE**

**MEASUREMENT DESCRIPTION**

**B** Bold   ***I*** Italics   U Underline   

- Bullets

- Numbers

[Link](#)

**PERCENT COMPLETE**   **STATUS**

-      -  

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

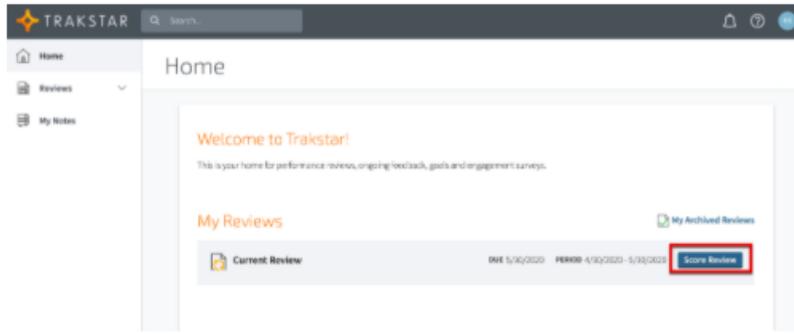
    

 **ALIGN TO STRATEGIC GOAL**   Choose a strategic goal to align to

**Add Email Reminder**

# Score Your Self-Review

## 1. Click Score Review on the home page



## 2. Select a Score for each Competency

Use the Rating Scale bar to pick your score.

### Initiative

20%

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



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 review will enter the scoring window at your organization's designated evaluation time. At that time, your current review button will change from "Set Goals" to "Score Review" 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 review.

**Initiative** 20%

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

 **Comments (0)**

KK

**Kelly Kapoor**

**B** Bold
*I* Italics
U Underline
 Bullets
 Numbers
 Link

I take initiative with projects. ↻

Cancel
Attach a file
Add 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 review.

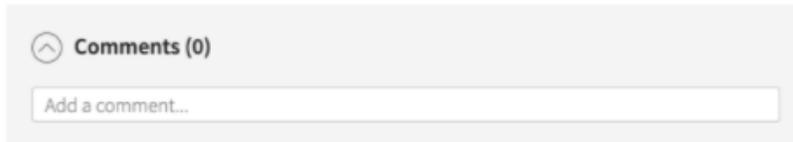
### 4. Answer Open-Ended Questions

Trakstar requires an answer to all questions. To save, click Add this Answer.

## 5. Use Summary Comments for Final Thoughts

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

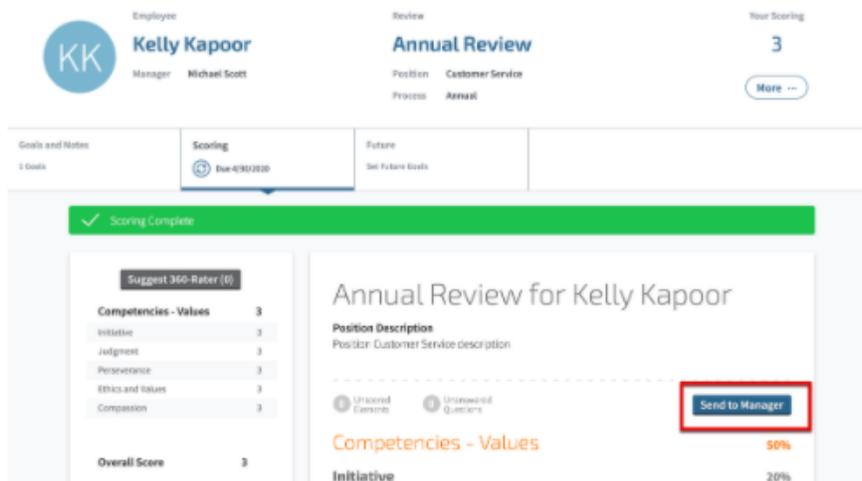
### Summary Comments



The screenshot shows a section titled "Comments (0)" with a small upward arrow icon to the left. Below the title 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-review information until you click **Send to Manager**. Also, the Self-Review can't be edited once it has been sent to your manager.

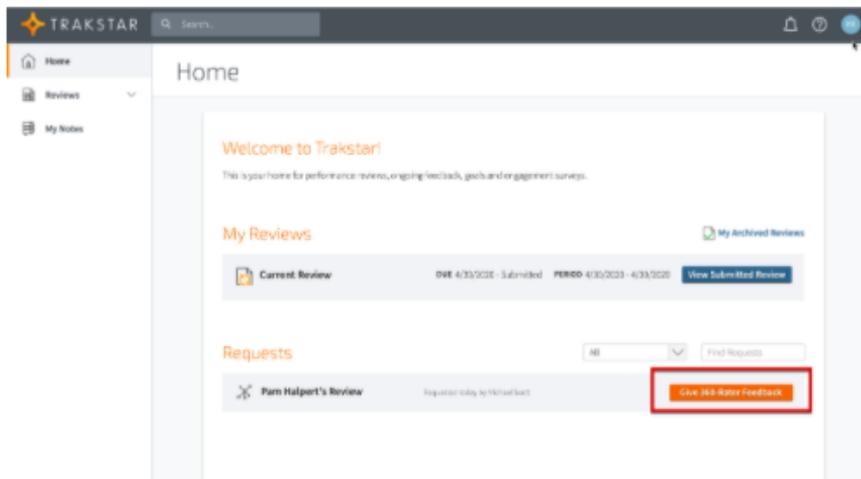


The screenshot displays the "Annual Review" interface for Kelly Kapoor. At the top, the employee's name "Kelly Kapoor" and manager "Michael Scott" are shown. The review title is "Annual Review" for the position "Customer Service" and process "Annual". A "Your Scoring" section shows a score of 3 and a "More" button. Below this, there are tabs for "Goals and Notes", "Scoring" (selected), and "Future". The "Scoring" tab shows a score of 3 and a date "Due 4/30/2020". A green banner at the top of the main content area indicates "Scoring Complete". On the left, a "Suggest 360-Rater (0)" section lists competencies: Initiative (3), Judgment (3), Persistence (3), Ethics and Values (3), and Compassion (3), with an "Overall Score" of 3. The main content area is titled "Annual Review for Kelly Kapoor" and includes a "Position Description" for "Customer Service description". It shows two "Unscored Competencies" and a "Send to Manager" button highlighted with a red box. Below this, a progress bar shows "Competencies - Values" at 50% and "Initiative" at 20%.

# 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**.



## 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.

**Initiative** 100%

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
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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.

Comments (0)

**KK Kelly Kapoor**

**B** Bold *I* Italics U Underline 

- 

 Bullets 

- 1

 Numbers [Link](#)

Pam shows great initiative!

Cancel Attach a file Add this comment

### 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.

## Annual Review for Pam Halpert

360-Rater Feedback From Kelly Kapoor

### Position Description

Position Human Resources description

0 Unscored Elements

0 Unanswered Questions

Decline Feedback

Send to Manager