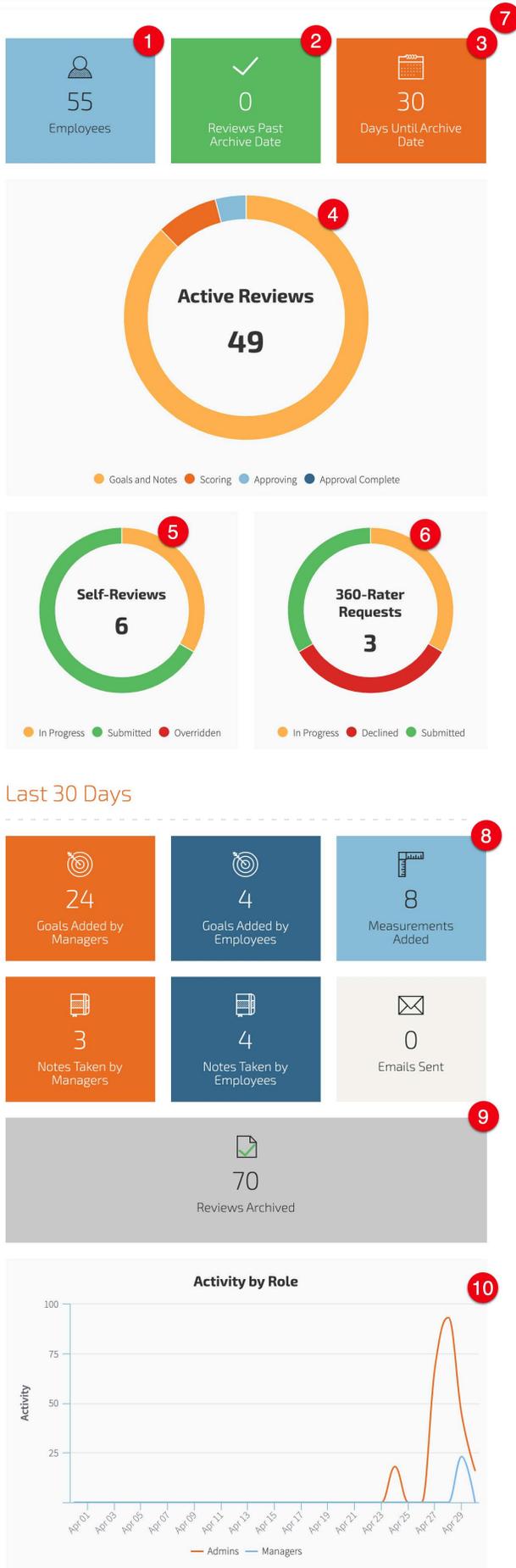


# Admin Guide

Trakstar



# Administrator Dashboard

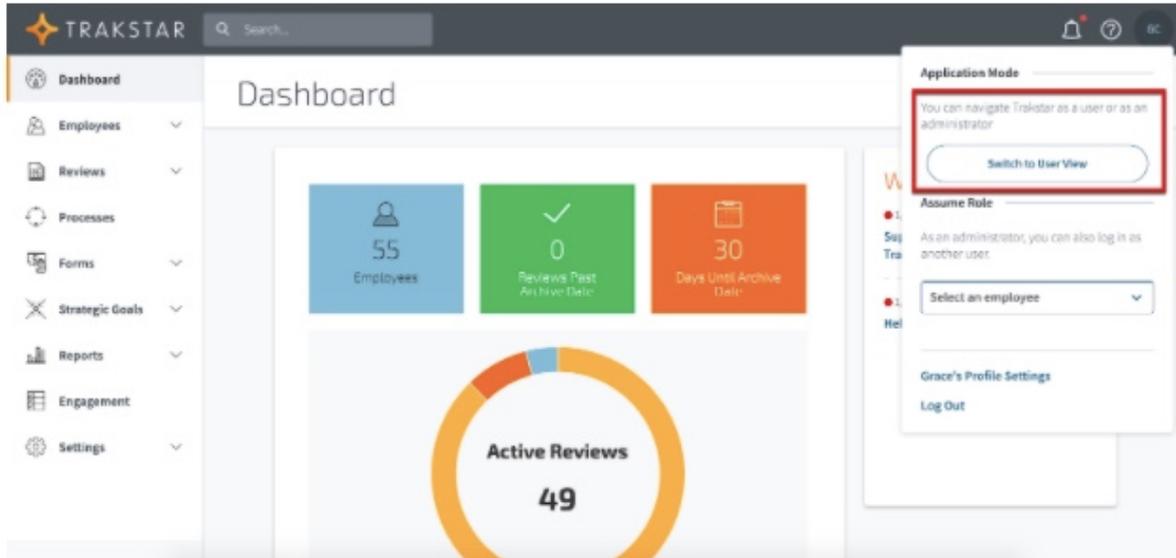


1. Number of Active Employees
2. Number of review past due
3. Number of days until your next due date or number of days since your last due date
4. Active review including review State (Goals & Notes, Scoring, etc.)
5. Active Self-review In Progress, Submitted and Overridden
6. Multi-rater requests In Progress, Declined and Submitted
7. 'What's New' Column includes important Invitations and Updates from Trakstar
8. Statistics about actions your users have taken over the last 30 days.
9. Number of emails sent from Trakstar to users in the last 30 days.
10. Activity (actions) based on user role in Trakstar for the last 30 days.

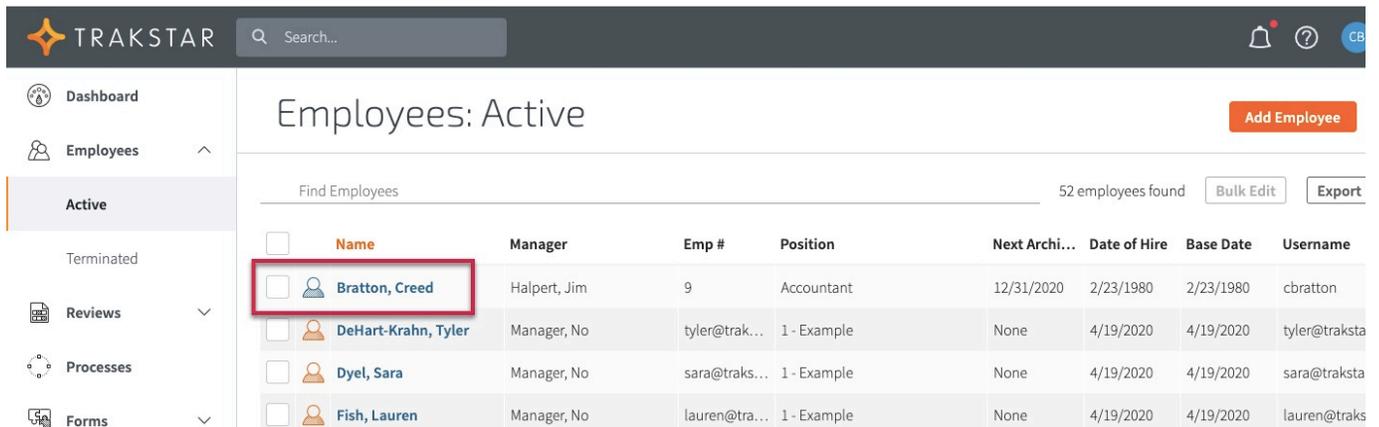
**PLEASE NOTE**  
The look of the Dashboard will vary depending on your site setup.

# Editing Employee Information

1. Ensure you are in your Administrator View.



2. Click on the Employees tab and select an employee



### 3. Click **Edit**

Creed Bratton

Profile Employee Folder Notes



## Creed Bratton

[Edit](#)

<b>EMPLOYEE NUMBER</b> 9	<b>EMAIL ADDRESS</b> nobody@trakstar.com
<b>DATE OF HIRE</b> 2/23/1980	<b>USERNAME</b> cbratton
<b>PASSWORD</b> <a href="#" style="color: #0070c0;">Change</a>	<b>ROLES</b> User
<b>USER TIME ZONE</b> Pacific Time (US & Canada)	
<b>LOCALE</b> United States - 6/18/2013 2:12pm	
<b>LOCATION</b> Scranton	

### 4. Update Employee Information as needed, make sure to **Save**

Here you can edit the employee's name, employee number, email address, login name and reset their password. You can also make them a manager and update the groups (location or department for example).



**FIRST NAME**

**LAST NAME**

**EMPLOYEE NUMBER**

**DATE OF HIRE**

**PASSWORD** [Change](#)

**EMAIL ADDRESS**

**USERNAME**

**ROLES**

- User
- Manager
- Administrator
- Restricted Admin

**USER TIME ZONE**  ▼

**LOCALE**  ▼

**LOCATION**  ▼

Cancel

Save

# Edit Review Information

Here you will update the employee's Manager, Position and Process. Base Date will typically match the employee's Date of Hire unless they have received a new position and this marks their transition date.

## Please Note

When you update the Manager or Position, Trakstar will ask you what you want to do with the current review. You can select to Cancel, which will lose the scoring data that has been entered but will retain goals and notes entered up until that point. You can also choose to "Leave" which will retain the scoring data and move the employee to the new manager or position after this review cycle.

If you are updating the manager you will also have an option to Re-Assign the document which will retain the scoring data and associate it with the new manager.

# Bulk Editing Employee Information

## 1. Select the Employees from the Employee tab to Update and Click Bulk Edit.

Select the employees one at a time by checking the box next to their name.

### Employees: Active

[Add Employee](#)


3 employees selected



<input type="checkbox"/>	Name	Manager	Emp #	Position	Next Archi...	Date of Hire	Base Date	Username
<input type="checkbox"/>	Bernard, Andy	Halpert, Jim	12	Accountant	12/31/2020	5/12/2004	5/12/2004	abernard
<input checked="" type="checkbox"/>	Bratton, Creed	Halpert, Jim	9	Accountant	12/31/2020	2/23/1980	2/23/1980	cbratton
<input checked="" type="checkbox"/>	DeHart-Krahn, Tyler	Manager, No	tyler@trak...	1 - Example	None	4/19/2020	4/19/2020	tyler@trakstar...
<input checked="" type="checkbox"/>	Dyel, Sara	Manager, No	sara@traks...	1 - Example	None	4/19/2020	4/19/2020	sara@trakstar...
<input type="checkbox"/>	Fish, Lauren	Manager, No	lauren@tra...	1 - Example	None	4/19/2020	4/19/2020	lauren@trakst...

## 2. Use the Arrow to Expand each Section, Update the Desired Information, make sure to Save

You will be updating the same information for all employees selected. Select the save option for the section you are working in. This tool also allows you to send Welcome Emails in bulk.

[Back to Employees](#)

Editing 3 Employees

**Groups**

LOCATION

---

**Review Details**

MANAGER

POSITION

PROCESS

NEXT ARCHIVE DATE

**Editing 3 Employees**

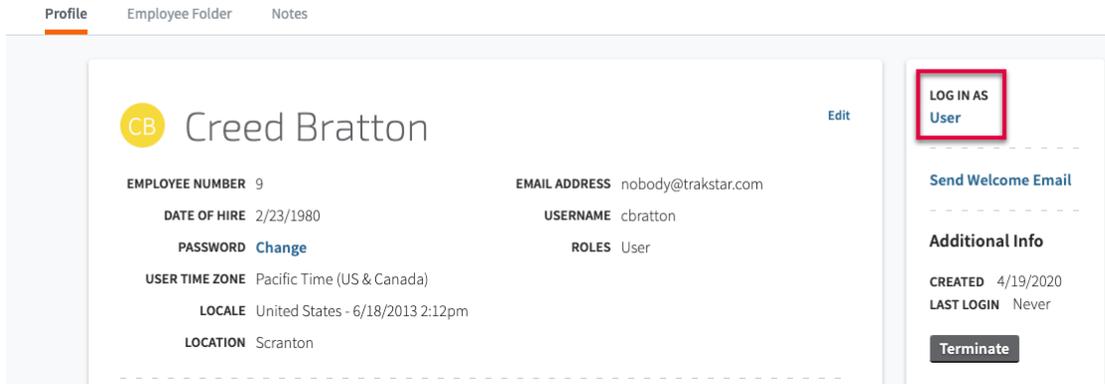
Sara Dyel  
Tyler DeHart-Krahn  
Creed Bratton

# Logging in as an Employee

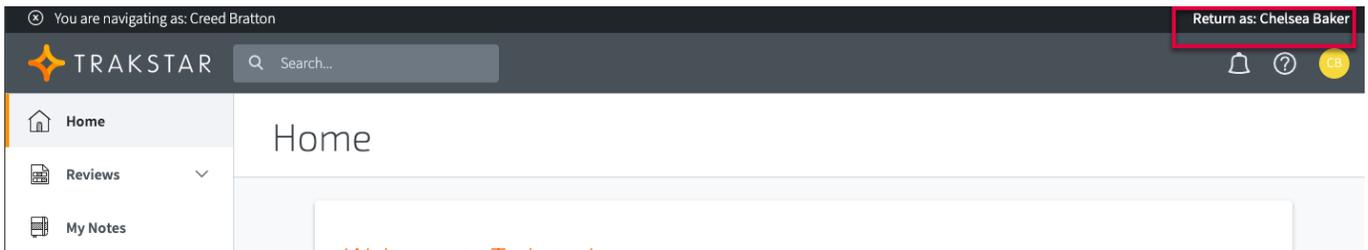
## 1. From an Employee's Profile select 'log in as User'

This allows you to view Trakstar as this user and take actions on their behalf. Trakstar will track that you are taking these actions in the company log, while proxied into their profile.

Creed Bratton



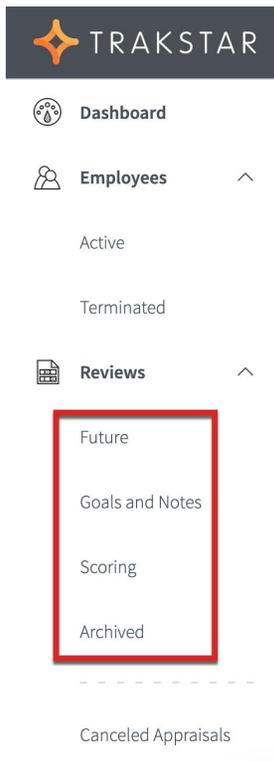
2. To log out of this employee's view "Return" in the upper right corner or click your employee's initials or profile photo to return to your administrator view.



### TRAKSTAR PRO-TIP

This is a great way to trouble-shoot your employee's questions since it gives you a sneak peak into exactly what they are seeing and can help walk them through next steps.

# Review



## Future

A future review is the ability for a manager or employee to set goals in the future while their current review is still open. Future reviews can be created by managers and employees themselves and will appear on their home screen. A list of those reviews will appear here.

## Goals and Notes

This list includes all reviews currently in the Goals and Notes phase of the review life cycle. The reviews cannot be evaluated but the employee and/or manager can take notes and set goals during this period. You can sort by any of the columns including the due date to see whose evaluations are coming up.

## Scoring

This review list shows you all reviews currently open for scoring. This can include past due reviews. This page will also indicate the progress of each step in the Review Process: Employee Self-review, Manager review, and Route for Approval.

## Archived

This list includes all Archived reviews in your Trakstar site. Archived reviews are considered finalized documents in Trakstar. Archived reviews are viewable by the Employee and their manager for reference within their own Trakstar interface. Archived reviews can only be Unarchived by Site Administrators to return them to a state where further edits/ changes can be made

# Scoring review: Status Report/Reset Guide

Emp	Mgr	Apr	What this Means	What you can do
			<ul style="list-style-type: none"> <li>- The employee may not have started their self appraisal, or it may be partially complete.</li> <li>- The manager may have not started the appraisal of the employee, or it may be partially complete.</li> </ul>	<p>Commonly, two in-progress circles indicates this means no work has been done.</p> <p>Commonly, this appraisal date can just be changed to something current or you can cancel the document.</p>
			<ul style="list-style-type: none"> <li>- Employee did not complete his/her self-appraisal.</li> <li>- Manager completed the appraisal of the employee.</li> </ul>	Log in as manager. Override the employee's self appraisal, then archive with no approvals
			<ul style="list-style-type: none"> <li>- Employee finished his/her self-appraisal.</li> <li>- Manager didn't finish appraising the employee. It is unknown if the manager never started or if it's partially complete.</li> </ul> <p><b>**This situation is the most complicated because you have to decide whether to preserve the work done by the employee, or just cancel and start fresh.</b></p>	<p>Log in as manager. Manager partially rated the</p> <p>Make a PDF of the Appraisal in its current state, and attach to the Employee's folder in Trakstar.</p> <p>ask the manager to finish promptly, then ask the manager to route/ archive.</p> <p>If some or no work has been done, rate the employee on behalf of the manager, selecting n/a for each area. This will preserve the employee's work, while allowing this one to be archived.</p> <p>Make a PDF of the Appraisal in its current state, and</p> <p>If only one appraisal is in this condition, you must log in as the approver and approve the appraisal.</p> <p>work done on the appraisal, and start fresh.</p>
			<ul style="list-style-type: none"> <li>-Employee completed his/her self-appraisal.</li> <li>- Manager completed the appraisal of the employee.</li> </ul> <p>Approver has not approved the appraisal.</p>	<p>If there are two or more of these "two green check" appraisals, archive the appraisals from the admin console using bulk edit.</p> <p>If only one appraisal is in this condition, you must log in as the approver and approve the appraisal.</p>
			<ul style="list-style-type: none"> <li>-Employee completed his/her self-appraisal.</li> <li>- Manager completed the appraisal of the employee.</li> <li>- Approver approved the appraisal.</li> </ul>	Archive the appraisal! This is the easiest of all situations.

# Processes

## DEFINING THE PROCESS

Processes are the rules by which each review must follow. The rules outlined here could include the routes for approval, the schedule, or whether or not there is a self-review. Different sets of rules may require different Processes.

## Overview

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Annual

[Overview](#) [Schedule](#) [Signatures](#) [Score Formatting](#)

### Goals

This setting allows the employee to add/edit their own goals. By default, managers can add/edit goals in Trakstar as long as there is a Goals section on their employee's review. This setting allows the employee to do so as well.

### Scoring Review

This setting allows you enable or disable employee self-reviews as well as to control if managers can override employee self-reviews.

### 360-Rater Feedback

This setting turns on and off the ability for managers to request feedback from other users inside and outside the organization. The option to globally anonymize 360-rater feedback here anonymizes this kind of feedback even to Site Administrators, so please use with extreme caution.

### Send for Approval

We have four options for approval workflows - make sure to select the one that will work best for your process.

### Archive Review

Trakstar offers an automatic archive of documents once all required steps are completed.

# Schedule

The dates outlined here will only affect reviews going forward. Adjusting the due date(s) outlined on this page will not change any reviews that are currently assigned to users. You will want to adjust current reviews in the Reviews tab.

## Base Date vs. Specific Date

This type of schedule tells the system to create the next due date relative to an employees Base Date/Date of Hire.

Example: Employees are evaluated every year on the anniversary of their Hire Date. Specific Date: This type of schedule allows you to set a focal point in the year when everyone will be getting their reviews.

Example: Employees will be reviewed quarterly based on the calendar year (March 31, June 30, September 30, and December 31).

## Deadlines

The "Deadlines" settings dictate the number of days before the archive date that managers/employees are allowed to complete, or score, the review. You can choose to have the same deadline for all parties or implement different deadlines for employees and managers.

## One-time vs. Recurring

One-time: These dates will only ever happen once in your schedule. You may choose to include something like a 90 day introductory review here as a one-time occurrence in the schedule.

Recurring: These due dates will continue to occur indefinitely according to the rules you outline.

Overview

Schedule

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Score Formatting

# Signatures

These Signature lines do not require any action in Trakstar. These lines simply create space for wet signatures on a hard copy of the review. If you want to keep your review process all online, you may want to set up the approval routes to include employee acknowledgment and remove all signature lines on this page.

You can customize the description for each signature line as needed for your organization as well as add additional signature lines

## Signatures

**TYPE**[Delete](#)**DESCRIPTION****TYPE**[Delete](#)**DESCRIPTION**[Overview](#)[Schedule](#)[Signatures](#)[Score Formatting](#)

# Score Formatting

The Score Formatting page allows you to set how the overall score will be shown to Employees and Managers. You can choose from the below options.

## Numeric

The overall score is shown as an average on a scale from 1-(chosen number) with a select number of decimal places.

## Reverse:

Similar to Numeric, above, the overall score is shown on a scale displaying '1' as the best option.

## Percent:

The overall score is shown as a percentage with the selected number of decimal places.

## Hidden:

This option hides any overall score calculation. Hidden scores are still calculated so you can draw reports but the score is not shown to the manager or employee.

## Range:

This option tells the the user a word description as an overall score. You can set the ranges and word descriptions here.

Range word descriptions can be used in conjunction with any of the other score formatting options.

Overview

Schedule

Signatures

Score Formatting

## TRAKSTAR PRO-TIP

Your choice for Score Formatting should reflect your rating scales in the Forms tab. If you use a 5 point rating scale you should mirror that in your final score formatting. This could be by selecting a 'numeric' rating out of 5 or selecting 'range' and have the word descriptors match the rating scale.

# Company Settings

**LOGIN NAME**

**FULL NAME**

**Login Name:** This is the unique identifier that associates an employee to your organization when they login to Trakstar. Employees will need to remember this so we recommend keeping it simple!

**Full Name:** This name will appear at the top of the page and in the tab of the user's Web Browser.

**TIME ZONE**

**LOCALE**

**Time Zone and Locale:** This setting outlines the global time zone and format for time and date. This can be adjusted on an individual basis on an employee's profile for remote employees.

**COMPANY LOGO**

Choose New File

**WHITE LABELING**

Use Trakstar logo

**Company Logo and White Labeling:** Here you can upload your organization's logo to be used throughout Trakstar and on PDF versions of review. You can also white label your system and have your logo appear in the top left corner of Trakstar.

**EMAIL NOTIFICATIONS**

**EMAIL NOTIFICATION FROM**

**EMAIL REMINDERS SENT AT**

12

AM

This applies to all email reminders, but does not control event-based emails.

**Email Notifications:** Enable/Disable email notifications for your entire site. This setting controls whether Trakstar can send emails to your users. The only email that will go out when this is Disabled is the 'Welcome Email' that sends a new user their login credentials.