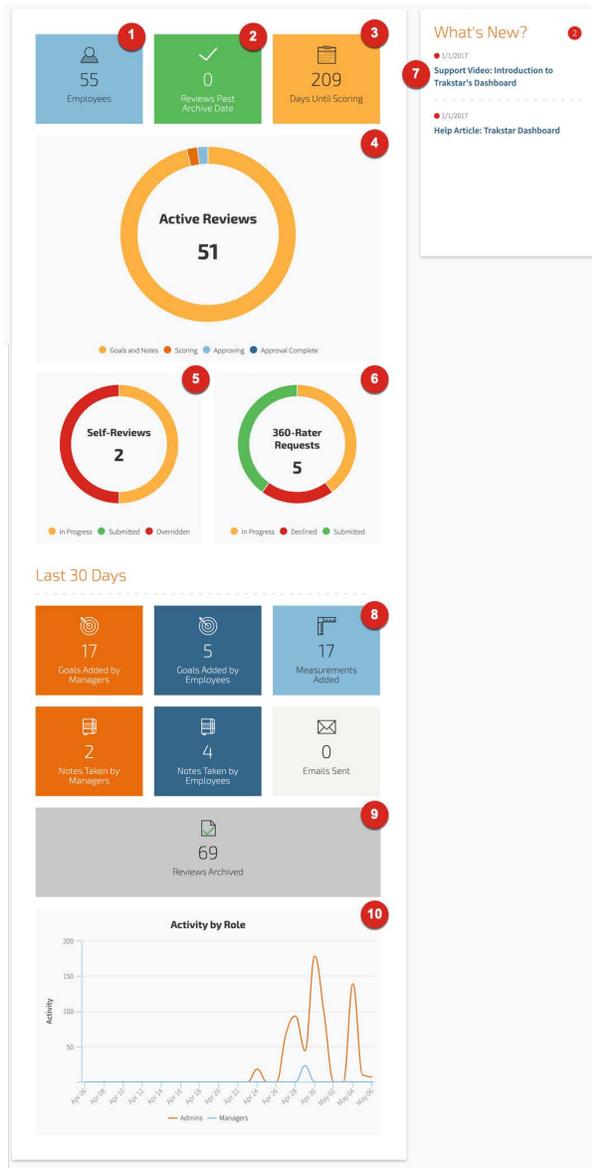


# **Restricted Admin Guide**

Trakstar

# Administrator Dashboard



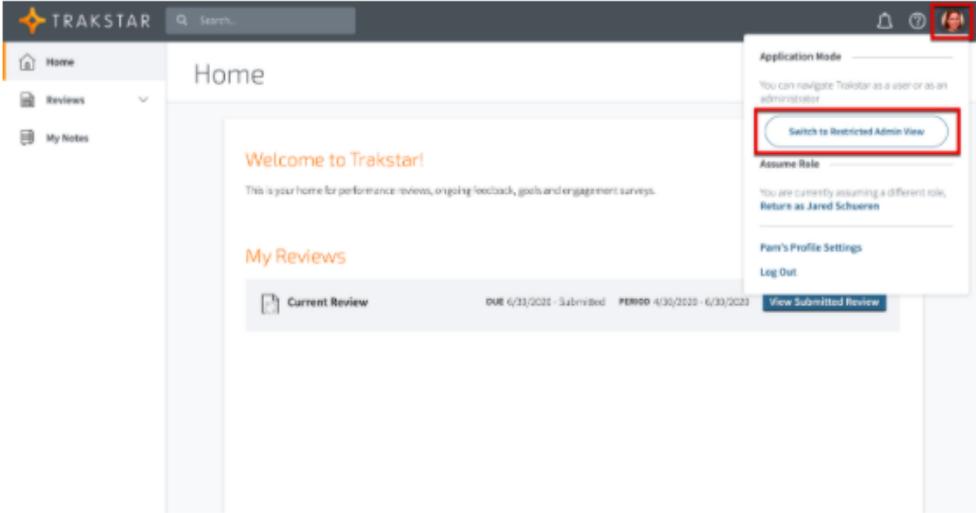
1. Number of Active Employees
2. Number of Reviews past due
3. Number of days until your next due date or number of days since your last due date
4. Active Reviews including Review State (Goals & Notes, Scoring, etc.)
5. Active Self-Reviews In Progress, Submitted and Overridden
6. 360-rater requests 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

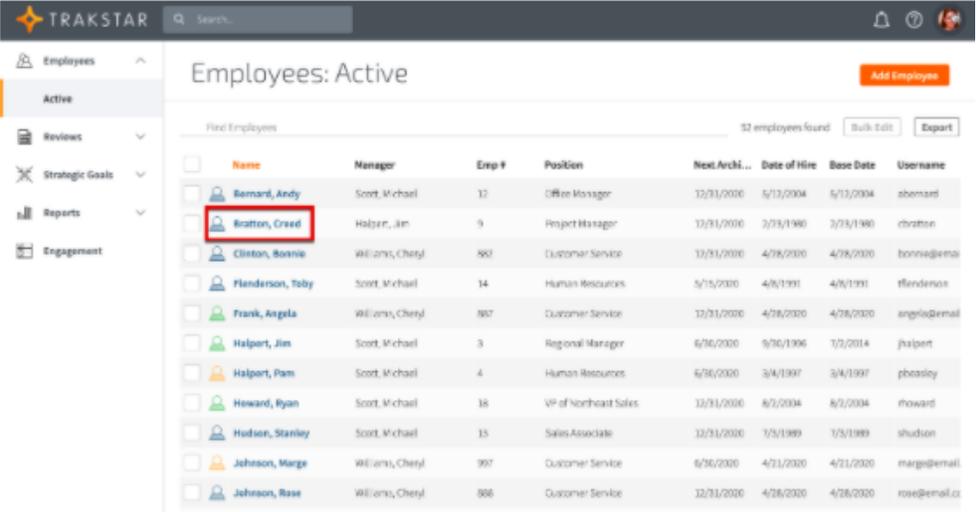
The look of the Dashboard will vary depending on your site setup.

# Editing Employee Information

## 1. Switch to your Administrator View



## 2. Select an Employee



### 3. Click **Edit**

Creed Bratton

[Profile](#) [Employee Folder](#) [Notes](#)

**CB** 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="#">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).

[Back to Employees](#)

Creed Bratton

[Profile](#) [Employee Folder](#) [Notes](#)

**CB**

|                        |  |                      |  |
|------------------------|--|----------------------|--|
| <b>FIRST NAME</b>      | <input type="text" value="Creed"/>                                       | <b>LAST NAME</b>     | <input type="text" value="Bratton"/>   |
| <b>EMPLOYEE NUMBER</b> | <input type="text" value="9"/>   | <b>EMAIL ADDRESS</b> | <input type="text" value="nobody@trakstar.com"/>                             |
| <b>DATE OF HIRE</b>    | <input type="text" value="2/23/1980"/>                                   | <b>USERNAME</b>      | <input type="text" value="cbratton"/>  |
| <b>PASSWORD</b>        | <a href="#">Change</a>   | <b>ROLES</b>         | <input checked="" type="checkbox"/> User<br><input type="checkbox"/> Manager |
| <b>USER TIME ZONE</b>  | <input type="text" value="Default: Pacific Time (US &amp; Canada)"/> ▾   |                      |  |
| <b>LOCALE</b>          | <input type="text" value="Default: United States - 6/18/2013 2:12pm"/> ▾ |                      |  |
| <b>LOCATION</b>        | <input type="text" value="Scranton"/> ▾                                  |                      |  |

# 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.

## Review Sets

Create ▾

Edit

**MANAGER** Jim Halpert  
**POSITION** Project Manager

**PROCESS** Annual  
**BASE DATE** 2/23/1980

+ Create Future Review

 **Annual Review** Cancel Review · Edit

**MANAGER** Jim Halpert      **ARCHIVE DATE** 12/31/2020

**POSITION** Project Manager      **PERIOD** 4/30/2020 - 12/31/2020

**PROCESS** Annual      **STATUS** Goals and Notes

## PLEASE NOTE WHEN CHANGING MANAGERS AND/OR POSITIONS

When you update the manager or position, Trakstar will ask you what you want to do with the current review. You can select Cancel, which will delete the review and all scored data will be lost that has been entered. (Goals and Notes will be retained up until that point.) The other option is to Leave the review with the previous manager or position. This option will retain scored data and will move the employee to the new manager or position after the current review cycle is completed and archived.

If you are updating the manager, you will also have the option to Re-assign the document which will retain the scoring data and associate it to 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.

| Name  | Manager          | Emp # | Position              | Next Archi... | Date of Hire | Base Date | Username    |
|---|------------------|-------|-----------------------|---------------|--------------|-----------|-------------|
| <input checked="" type="checkbox"/> Bernard, Andy   | Scott, Michael   | 11    | Office Manager        | 12/31/2020    | 5/11/2004    | 5/11/2004 | abernard    |
| <input checked="" type="checkbox"/> Bratton, Creed  | Halper, Jim      | 9     | Project Manager       | 12/31/2020    | 2/23/1990    | 2/23/1990 | cbratton    |
| <input checked="" type="checkbox"/> Clinton, Bonnie | Williams, Cheryl | 862   | Customer Service      | 12/31/2020    | 4/28/2020    | 4/28/2020 | bonnie@ema  |
| <input type="checkbox"/> Flenderson, Toby           | Scott, Michael   | 14    | Human Resources       | 5/15/2020     | 4/8/1991     | 4/8/1991  | tflenderson |
| <input type="checkbox"/> Frank, Angela              | Williams, Cheryl | 867   | Customer Service      | 12/31/2020    | 4/28/2020    | 4/28/2020 | angela@ema  |
| <input type="checkbox"/> Halper, Jim                | Scott, Michael   | 3     | Regional Manager      | 6/30/2020     | 9/26/1996    | 7/2/2014  | jhalper     |
| <input type="checkbox"/> Halper, Pam                | Scott, Michael   | 4     | Human Resources       | 6/30/2020     | 3/4/1997     | 3/4/1997  | pbeasley    |
| <input type="checkbox"/> Howard, Ryan               | Scott, Michael   | 18    | VP of Northeast Sales | 12/31/2020    | 8/2/2004     | 8/2/2004  | rhoward     |
| <input type="checkbox"/> Hudson, Stanley            | Scott, Michael   | 15    | Sales Associate       | 12/31/2020    | 7/5/1989     | 7/5/1989  | shudson     |
| <input type="checkbox"/> Johnson, Marge             | Williams, Cheryl | 997   | Customer Service      | 6/30/2020     | 4/21/2020    | 4/21/2020 | marge@ema   |
| <input type="checkbox"/> Johnson, Rose              | Williams, Cheryl | 866   | Customer Service      | 12/31/2020    | 4/28/2020    | 4/28/2020 | rose@ema    |

## 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

Editing 3 Employees

Groups

LOCATION

Cancel Save

Review Details

MANAGER

POSITION

PROCESS

NEXT ARCHIVE DATE

Create Ad Hoc Reviews

Create one time, Ad Hoc reviews for all selected users.

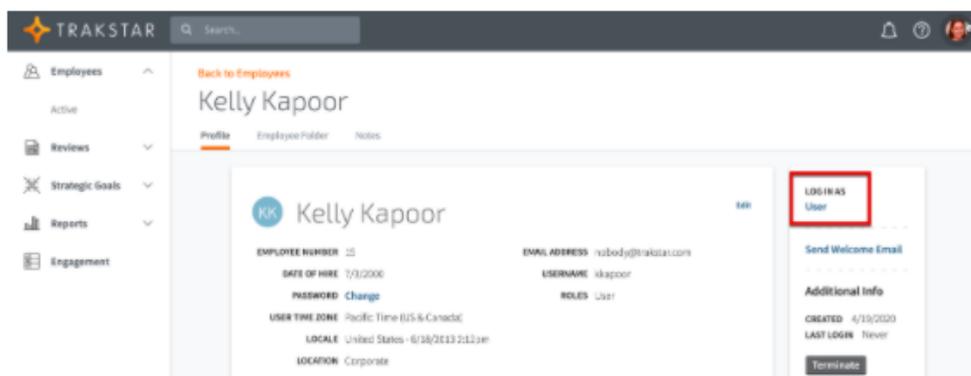
Editing 3 Employees

Andy Bernard  
Creed Bratton  
Bonnie Clinton

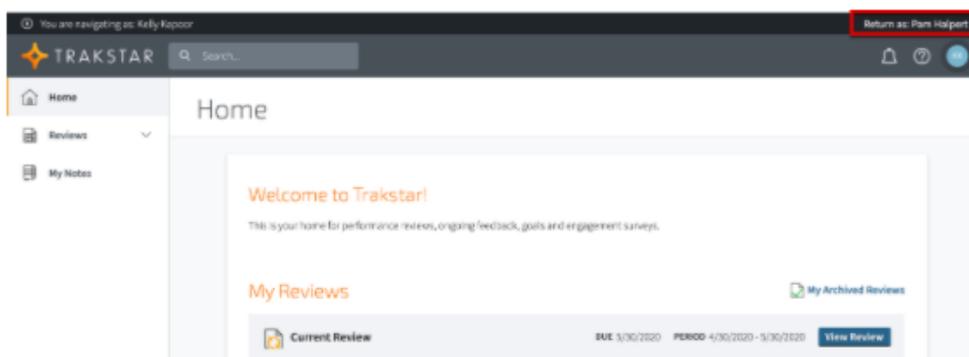
# Logging in as an Employee

## 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



## 2. To log out of this employee's view select Return as Administrator in the upper right corner.



### 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.