<u>Traitset™ Interactive Report Tracker FAQ</u>

1) ***What is the new "Metrics" button and how do I use it?***

   A brand new feature in the Traitset™ Interactive Report Tracker, **Metrics** will provide you with continuing information by **Time Period** regarding your employees. Before clicking on the **"Metrics"** button, please select the **Time Period** you wish to view from the Time Period buttons on the left side of the screen. If you are the manager of one location (Client), you will see numbers in the left hand column, then abbreviations and a description. Below the Metrics are instructions for how to use the IRT system to obtain accurate Metrics. If you are a regional manager or corporate with many locations (Clients), your Metrics will be in a matrix with the abbreviations for the type of metric along the top and the locations (Clients) listed in the left-hand column. The Metrics available are Beginning Employees, Ending Employees, Change (Increase/Decrease), Voluntary Terminations, Involuntary Terminations, Turnover, Candidates, Interviews, Hires. These are all computed for the **Time Period** that was selected on the main IRT page and are accurate only if you are using the Traitset™ Interactive Report Tracker system as described in the instructions on the **Metrics** page and in the IRT Advanced/Tracking Guide.

2) ***We use the Individual Report all the time. How do I get that report through this new interface?***

   By simply clicking under the header **"Report"** on the word "Report" opposite the job-seeker's name after you have 1) Opened the appropriate questionnaire (Work Ethic, Customer Service, etc) and 2) Selected their name from the drop down menu by clicking on their name and clicking the "Display Candidate" button. [See "Basics Guide to Using the Interactive Report Tracker".] NOTE: If you have already setup job Positions, click on the job position such as "any position", "cook", etc.

   The Individual Report will open in a new window. You can either read the report online or simply print it. However, it is important to realize that all the information about the job-seeker is available and more easily compared to others through the new Interactive Report Tracker.

3) ***When I click on the Candidate's name to view the Individual Report a new screen comes up and not the Report. What is this?***

   The is a new Advanced/Tracking option called the "**Candidate Manager"**. From this screen you can link in all questionnaires and their reports that a candidate has completed, launch them new questionnaires and note their progress, track them through the hiring process (Screen, Interview, Hire, Terminate) and change their job position. For more information see the “Advanced/Tracking Guide to Using the Interactive Report Tracker”.

4) ***How do I add names to the grid? How do I remove them?***

Select the questionnaire you are interested in working with by clicking the plus sign (+) next to its name. This opens the questionnaire so you can select job seekers and see their overall information, their ACp, and their individual traits as well as viewing their overall score on the grid for that questionnaire.

To add job seekers/names, use the drop down menu to the right of the name of the questionnaire to select the name of a candidate whose information you wish to see and click on the DISPLAY CANDIDATE button. Their name will be moved from the list of names to the list of active names and their scores displayed.

Note: The number next to their name corresponds to the number on the grid and is merely an identifier. It is the same on all scores and traits for that questionnaire. However, if you add a new name, the numbers will likely change because the displayed names are always listed in order of the overall score from highest to lowest (after the BENCHMARK scores, which are numbered separately and are notated with stars).

To remove job seekers/names, click on the minus sign (-) next to a displayed name. The job seeker will be removed from the list and re-added to the list of names available on the drop down menu.

5) ***When I hit the minus sign and remove the name, the grid seems to still have the score. How do I refresh the grid so it matches the list?***

While the grid is usually refreshed as you add and remove names, because browsers do cache data, it is possible for what is displayed on the grid to get out of synch with the list of job-candidates. Simply click on the browser’s refresh button and the grid will instantly match the list of job-seekers displayed for the open questionnaire.

6) ***I displayed some new candidates under a questionnaire but their numbers are not on the GRID. I also hit my browser “refresh” button but nothing happened.***

The easiest thing to do is to “collapse” that questionnaire (by hitting the minus “-“ sign next to the questionnaire name), hit your BROWSER “refresh” icon, and finally re-OPEN the questionnaire by clicking on the plus “+” sign next to the questionnaire name.

If you are still having problems, you might want to clear your browsers cache. In MOST browsers, the Clear Cache option is on the Menu under Tools-Options-Privacy. Clearing your cache will not affect your browser history or bookmarks.

7) ***My drop down box list of candidates has only two (2) Candidates! How do I find others I know have taken Questionnaires?***

When the new **Interactive Report Tracker** appears on the screen, the default **Time Period** selected is **This Week** (calendar week) so if you know that candidates have been completing the Questionnaire over more than this current week, select the appropriate Time Period button from the Left side of the screen such as "This Month" or "Last Month" or "This Quarter.".

8) ***What is the difference between using the browser refresh and the "Reset This Time Period" button at the bottom of the IRT and above the "Time Periods?"***

The browser refresh button simply clears out the cache and fetches the current display from the server. The IRT "**Reset This Time Period**" button checks with the database and adds the latest candidates (in case any have come in while you have been working with the IRT) and returns the IRT to its default/collapsed state (for example, adding back any BENCHMARKS you might have closed) which returns all names displayed except Benchmarks to the drop down boxes. REMEMBER – The "Reset This Time Period" button is looking for NEW questionnaires completed so it would be used in "This Week", "This Month", "All Periods", "Year to Date" but NOT needed for "Last Month".

9) ***Can I get the interview questions within the Interactive Report Tracker (IRT) or do I have to go to back to the basic Individual Report?***

You can conduct the entire interview from the IRT. Just go to each individual trait and click on the trait ranking (i.e., Warmth – Very Low) next to the job-seeker's name. Just above in the window to the left of the grid you will see what their score indicates and an appropriate question to ask that job-seeker. This is the exact same question that is used in their Individual report (which is also available by clicking on the job-seeker's name). If you cannot see that window, you can "collapse" (click on the minus "-" sign) individual traits in order to better view the trait ranking box. You can also make Notes at this time. Use the Basics Guide (http://www.traitset.com/tsirtrackerbasicv1.pdf) if you are unsure how to do that.

10) ***What are the stars on the grids for and why are they in different colors?***

The stars indicate scores for candidates that have been designated as BENCHMARKS. There are two kinds of BENCHMARKS: 1) those set by management for the entire organization and 2) those set by the hiring manager for his or her own use. Corporate and Local BENCHMARKS are indicated with different colors.

11) ***What are BENCHMARKS and what are they for?***

BENCHMARKS are used to compare current job-seekers with others that management has selected as either positive or negative models. That is, a current good employee might be set as a BENCHMARK so hiring managers know which combination of traits might indicate another good employee. A past poor employee might be used as a negative model so hiring mangers know which combination of traits might indicate another poor hiring experience.

12) ***How do I set a BENCHMARK in the Interactive Report Tracker?***

There is a button on the right side of the title bar of the Interactive Report Tracker that says "**Create / Edit Benchmarks**". Click on the button and simply add or remove the names you wish to use as Local BENCHMARKS. The BENCHMARKS are added separately for each questionnaire since it is possible to find different models of desirability in different people. However, you can also pick the same names for each questionnaire, if you wish. You can also make comments about the Benchmark candidates in the text box that opens.

Corporate BENCHMARKS are added through a different interface. However, the local manager may choose to not display them by unchecking boxes at the top of this page and clicking on the **"Update"** button.

13) ***Do the different colors in the bar charts for the Individual Traits have a special significance?***

The differences in the colors in the bars used in the individual traits is to aid in reading the report. However, The BLACK (positive = higher is usually better) and RED (negative = lower is usually better) scores are given different palettes. The BLACK scores are shown in shades of black, blue, and green. The RED scores are shown in shades of red, brown, and purple. Local and Corporate BENCHMARKS are shown in different colors.

It is also important to note that the BLACK scores begin with zero on the left and the RED scores begin with zero on the right. This helps the hiring manager see that with BLACK scores higher is generally better and with RED scores lower is generally better.

The colors used to display the bar indicate nothing about job-seeker's score or desirability.

14) ***The Individual Reports had a link at the end so I could check the definitions of the various traits such as Warmth, Integrity, Organized, Withholding, or Anchor Cherry-picking (ACp). Is there a way to see these definitions from the***

Interactive Report Tracker (IRT)?

You can get to the same link by opening the individual report by clicking on the name of any job-seeker displayed in the Interactive Report Tracker or by going to www.traitset.com and clicking on the questionnaire for which the definitions are desired.

15) ***When I click on the All Periods button there are no names to select from the drop down box. Why? This happens sometimes when I click on the "THIS WEEK" button as well. Again, why is that? Is something not working correctly?***

As a name is displayed it is removed from the list of names available for display. When a name is closed (by clicking on the minus sign ("-") next to the name, it is added back to the list of names available for display. When ALL the names are displayed (whether through "display all" or the "All Periods" button), the list of names available for display will be empty. If you close some names, there will be names available for display.

16) ***Above the drop down box with the names of the candidates there is a little line that says "Order by: Date Name Score Display All". What is this used for and how is this feature used?***

When you look for the name of a job-seeker it is possible to look for them in the drop down menu in different ways. The default is by date – from the most recent to the oldest in the period selected. However, you can also sort the list by name, by score (highest to lowest), or by selecting Display All, put all of the names from the list on display.

All of the names displayed are ranked from highest to lowest by Overall Score. When a new name is added, the list is reordered and the new name is placed in the list according to their Overall Score.

17) ***What else should I know about the Interactive Report Tracker (IRT)?***

The new report will enable managers to more quickly compare candidates for a specific job position(s) by Overall Score, placement on the GRID and Trait Scores. The candidates are ALWAYS listed in the order of Overall Score from highest to lowest within the individual Trait Scores as well. A candidate numbered 5 under Overall Score will be #5 on the GRID and #5 in the individual Trait Scores. The manager can compare two candidates, three or all candidates for a particular questionnaire. The manager can also use the Benchmark scores to see how new candidate compare to successful current employees.

There are also new advanced features that will enable you to view candidates by job position, hiring status and GRID classification.

16) ***I have begun using the new Notes feature available for Overall as well as individual trait rankings. Can I delete a note that I have added?***

Yes, notes can be edited or deleted. Simply click anywhere on the note text and it will appear in a box with an **Update** button next to it. Either edit the text or to DELETE the note entirely, delete all the text by using either CTRL + A and then hit the DELETE button on your computer keyboard or just use the DELETE button to erase all the text. Click on the "Update" button and the note is removed.

17) ***I am using the "New Candidate" button to launch questionnaires to prospective candidates. How can I see if they have completed the questionnaire? How can I find what I sent if I need to change the candidate's email address?***

When you click on the "New Candidate" button, in the area just above where you enter the Candidate's name is a button, View In Process Questionnaires. Click on this button to view questionnaires that have been sent but not completed. As a Candidate completes a questionnaire, they will appear in the main report page for the IRT. When you view your list of "in process" candidates, you will see their name, the name of the questionnaire you launched to them, the email address you launched it to and the date/time it was sent. There are also two buttons next to the date/time: "**Renotify"** and **"Close"**. To correct a wrong email address, click on the "Renotify" button and the sending page will appear as it does when you first create the New Candidate. You can correct the TO, FROM emails as well as add to the body of the email and click on the "Send Email" button to re-send. If this was a Candidate to who you sent the wrong questionnaire, you can use the "Close" button. The "Close" button will remove the Candidate and the questionnaire from the view and close the incomplete questionnaire. You can also close this questionnaire for this candidate if you feel too much time has passed since you launched it.

18) ***What is the difference between the new "Last Quarter" and "This Quarter" Time Period buttons?***

All Time Periods in Traitset™ are based on the Calendar year so the Quarters run January through March, April through June, July through September and October through December. The "Last Quarter" time period is the last COMPLETED quarter. If this is the month of February, the last completed quarter would be October through December. "This Quarter" represents the current ongoing quarter. If this is the month of April, "This Quarter" is the new quarter beginning April 1st. "This Quarter" will represent a completed quarter on the last day of June for the April through June in this example. On July 1st, "Last Quarter" would then be the April through June quarter and "This Quarter" the new quarter started July 1st.