



Basics Guide to Using the Interactive Report Tracker (IRT)

Basic Features:

- **Viewing Reports:** View by questionnaire all Candidates who have completed a questionnaire by Time Period.
- **Narrowing Report by Category:** Design your reports and screen to see only the Candidates with scores that you select from the new **Select Candidates** button.
- **Viewing Individual Candidate Reports:** Click under the new “**Report**” header on the **Report** link next to Candidate’s name to view the Report
- **Using the “Notes” Feature:** Adding notes to a Candidate’s Online Report in the IRT while viewing the Report, phone or in-person interviewing.
- **Extra Help:** New easy to read headers and “click over” pop-ups for ease in navigation. Two new Online Help Guides (Basics and Advanced/Tracking)
- **Metrics:** New feature to track turnover, terminations, hires, interviews. Benefits include measuring number of interviews to number of hires, types of terminations (voluntary or involuntary) and percentage of turnover. Requires use of **Candidate Manager** for Tracking a Candidate’s interview, hire, terminations dates. Refer to **Advanced Tracking Guide** for instructions.

Current Users of Traitset™: You will notice some new buttons: At the top in the title bar – **Create/Edit Positions** (above the “Periods” buttons) – **New Candidate** and **Select Candidates**. You will also notice a new column header, **Report** – under which you can click on the word “Report” to see the Individual Reports that you used to see by clicking on the Candidate’s name. A NEW feature is that by clicking on the Candidate’s name you will go to a “Candidate Manager” where you can link and view all questionnaires completed by this candidate. This topic is covered in the **Advanced Guide**. All other features of the former “Interactive Report” still function as before. Please read the steps below to become completely familiar with the new features of our exciting new **Interactive Report Tracker!**





[Create/Edit Benchmarks](#)
[Create/Edit Positions](#)

TraitSet™ Central: Dan's Demonstration Site
This Week:

New Candidate **NOTICE:** We've upgraded! Many new features are available. Nevertheless, you can continue to use this report like before with the following minor change:

Select Candidates To view a Candidate's Individual Report, click on the word "Report" under the column to the right of the Candidate's name labeled "Report" or click on the job position in that column such as "Any Position", "Cook", etc.

Periods For HELP or more information on the new features, click on the "?s Help Page" button on the left side of the screen below the Time Period buttons or email your account representative or traitset@hrgems.com.

[All Periods](#)
[Year to Date](#)
[This Quarter](#)
[Last Month](#)
[This Month](#)
[This Week](#)

Reset This Time Period

?s Help Page

	Order by : Date	Name	Score	Display All	
IFE & WE	<input type="text"/>			Display All	<input type="button" value="Display Candidate"/>
+ Inquiry for Employment (v.1)					
+ Questionnaire WE (4.0)	<input type="text"/>			Display All	<input type="button" value="Display Candidate"/>
+ Work Ethic/Integrity (4.0)	<input type="text"/>			Display All	<input type="button" value="Display Candidate"/>
+ Customer Service (4.0)	<input type="text"/>			Display All	<input type="button" value="Display Candidate"/>
+ Leadership/Management Aptitude (4.0)	<input type="text"/>			Display All	<input type="button" value="Display Candidate"/>
+ Sales Potential (4.0)	<input type="text"/>			Display All	<input type="button" value="Display Candidate"/>





Basic Steps

Viewing Reports:

- 1) When you first log into the Interactive Report, the screen will be in “collapsed” mode showing a list of all questionnaires you have on your TraitSet™ site. The Time Period selected will be **This Week** and will include all questionnaires taken so far this calendar week.
- 2) Select the **Time Period** you wish to view: from All Periods, Year-to-date, This Quarter, Last Quarter (**NEW!**), Last Month, This Month, This Week from the time period buttons on the left side of the screen.
- 3) You will note the “+” (**plus**) sign to the left of each questionnaire name. Click the + next to the questionnaire you wish to view. You will see this questionnaire expand into Overall score, a grid, and the “Trait” category scores. The “+” **plus sign** will **expand** a questionnaire or Trait Score category.
- 4) When you expand a Questionnaire, the **Candidate** who appears below the Questionnaire (if not a benchmark) will be the MOST RECENT to have completed that questionnaire.
- 5) From the drop down box next to the questionnaire name you will see a list of all candidates from the time period selected who have taken that questionnaire. To view the list in the drop down box by Date, Name or Score (Overall), click on the **blue underlined** term above the box To add candidates to the report, select them one at a time in the drop down box and click on the “**Display Candidate**” button to the right. You may add as many as you want. If you wish to display **all** of the candidates in the list at once, click on the blue underlined “**Display All**” above the drop down box.

	Order by : Date	Name	Score	Display All	
Eric K Schichl 9/8/2005	<input type="text"/>			Display All	<input type="button" value="Display Candidate"/>



- 7) When you add and remove candidates you may need to use your browser's **“Refresh” button** to see the changes reflected on the Grid plot. Click on  for Internet Explorer (IE),  for Netscape, or  for Mozilla/Firefox. If the numbers on the grid do not match up with the list of Candidates, close or collapse the Questionnaire by clicking on the **“-” minus sign**, hit your browser's “Refresh” icon, and re-open the Questionnaire by clicking on the **“+” plus sign**.
- 8) After you add all by **“Display All”**, the candidates will be listed by Overall Score for the questionnaire in descending order. You can find a candidate on the grid below the Overall Scores by the number next to the candidate's name. There is also a column showing the ACp (Anchor Cherry Picking which is the only percentage score. This shows the percentage of “socially desirable” answers (1's or 8's) chosen by that candidate for a given questionnaire.
- 9) You may **“collapse”** any of the Trait Scores, by clicking on the **“-” sign** next to the Trait name. This will enable you to better see descriptions of the trait ranking as you scroll down. REMEMBER – If you click on the **“-” sign** next to a Candidate's name and number, it will remove that candidate from the display and return them to the drop down box..
- 10) To view other questionnaires, start again at Step #3. ONLY if new candidates have completed questionnaires and are not appearing on the report, click on the **“Reset This Time Period”** button on the left below the Time Period buttons. The **Reset This Time Period** button will return the page to its default/collapsed state and add any **NEW** candidates who have completed questionnaires. 

Narrowing Report by Category:

- 11) The new **“Select Candidates”** button at the top left margin of your screen allows you to view Candidates by **position** (Not used or setup by BASIC users); by **status** (Not used or setup by BASIC users. All Candidates default status is “S” or screening pool – just taken questionnaires.); by **GRID classification per questionnaire** (see only those whose WE Grid score is in the green/strongest style, for example). See **“Select Candidates”** screen shown



below. NOTE: Please select the **Time Period** you wish to view BEFORE going to the “Select Candidates” screen.

Narrow candidate field by GRID classification (check all you wish to display)

IFE & WE	
<input checked="" type="checkbox"/>	(1) Strongest Style
<input type="checkbox"/>	(2) Clever Style
<input type="checkbox"/>	(3) Cautious Style
<input type="checkbox"/>	(4) Weakest Style
<input type="button" value="Update"/>	
Work Ethic/Integrity (4.0)	
<input type="checkbox"/>	(4) Weakest Style
<input type="checkbox"/>	(2) Clever Style
<input type="checkbox"/>	(3) Cautious Style
<input type="checkbox"/>	(1) Strongest Style
<input type="button" value="Update"/>	
Customer Service (4.0)	
<input type="checkbox"/>	(1) Sociable Style
<input type="checkbox"/>	(2) Efficient Style
<input type="checkbox"/>	(3) Caution Area-S
<input type="checkbox"/>	(4) Caution Area-E
<input type="checkbox"/>	(5) Weakest Style
<input type="button" value="Update"/>	
Leadership/Management Aptitude (4.0)	
<input type="checkbox"/>	(1) Supportive Style
<input type="checkbox"/>	(2) Directive Style
<input type="checkbox"/>	(3) Caution Area-S
<input type="checkbox"/>	(4) Caution Area-D
<input type="checkbox"/>	(5) Weakest Style

- To see the “**GRID Classification**” option, SCROLL or PAGEDN the screen. Each Questionnaire may be sorted by GRID Classification. Using the “**Select Candidates**” button you can view Candidates who have completed a questionnaire by where they appear in the Scoring Grid by one choice, such as “Strongest Style” or by several choices. Be sure to always click the “**Update**” button below the Questionnaire categories for each on the **Select Candidates** screen before clicking on the **Return** button to go back to viewing the report.

Viewing Individual Candidate Reports:

- Next to the Candidate’s name will be either the word “**Report**” if you do not have any job positions setup or the Job Position such as “cook”, “server”, etc. The header for this column is **REPORT**.
- To view a Candidate’s **Individual TraitSet™ Report**, click on either the word “Report” next to their name or click on the Job Position. A separate window will open that you can view, email or print and close to return to the



IRT. See sample screen below:

- Customer Service (4.0)					Order by : Date	Name	Score	Display All	Display Cal
- Overall Customer Service		Report	Overall	ACp	0%				
-	Jobb Seeker 2/9/2006	Report	54	19					
-	Jeremiah R Bergman 11/10/2005	Report	95	55					
-	kathy w graham 1/23/2006	Report	78	0					
- 1	Jeremiah R Bergman 11/10/2005	Report	95	55					
- 2	Keith W Cronebach 9/3/2005	Report	85	62					
- 3	Lori L DeKett 9/10/2005	Report	83	38					
- 4	J C 6/8/2006	Report	81	36					
- 5	Len Way 9/8/2005	Report	77	7					
- 6	Homer Contopidis 6/21/2006	Report	72	7					
- 7 S	sher brown 9/12/2005	Any Position	65	40					
- 8	Arnold P Ziffell 4/19/2006	Report	57	5					
- 9 S	Jobb Seeker 2/9/2006	Any Position	54	19					

15) Below the Grid are listed the **Trait scores** with the positive (higher is generally better) traits first and least desirable or inverted (lower is usually better) traits last. Some questionnaires do not have any inverted scores. The candidates are still listed in order of the Overall score and not their score in this particular trait.

16) As you look at the Trait scores and bar graphs to the right of the scores, you can also click on the description (**Transportation – Very High**, for example) and see above the candidate’s name, a description of what that trait ranking means, and possible interview question.

The screenshot shows the TraitSet interface for a candidate named Jeremiah R Bergman. At the top, there is a browser window showing the URL: http://www.traitset.com/course/course_tsview.aspx?book=78&group=8&course=1440&span=-1&action=... Below the browser window, there is a table of trait scores for the candidate. The table has columns for Position, Name, Report, Overall, and ACp. Below the table, there is a section for the candidate's name, Jeremiah R Bergman, with a status of 'Completed' and a launch date of '11/10/2005 11:14:38 AM'. There are two text boxes with 'Add' buttons for notes. Below the notes, there is a section for the trait 'Warmth - Very High' with a description: 'Person has too much of an interest in others (naive). Question: How do you control your tendency to be overly supportive and nice?'. Below the question, there is another text box with an 'Add' button. To the right of the text boxes, there is a bar chart for 'Overall Customer Service' with a scale from 0% to 100%. The bar chart shows a score of 55% for Jeremiah R Bergman. Below the bar chart, there is a table of trait scores for the trait 'Warmth'.

	Report	Score	Ranking	0%	100%
-	Jobb Seeker	14	Warmth - Very Low		
-	Jeremiah R Bergman	92	Warmth - Very High		
-	kathy w graham	77	Warmth - Very High		
- 1	Jeremiah R Bergman 11/10/2005	92	Warmth - Very High		
- 2	Keith W Cronebach 9/3/2005	86	Warmth - Very High		
- 3	Lori L DeKett 9/10/2005	89	Warmth - Very High		
- 4	J C 6/8/2006	66	Warmth - High		
- 5	Len Way 9/8/2005	72	Warmth - High		

Using the “Notes” feature:

17) You will notice the two (2) text boxes with the “Add” buttons below the Candidate’s name opposite the Grid and below the Traitset™ Ranking score. This is a **Notes** feature. The hiring manager can interview the Candidate and add any notes either about an overall impression (the top text box) or about the Candidate’s comments/answers to interview questions specific to that Traitset™ ranking (the text box below the Trait ranking). The example above



TraitSet™ Interactive Report Tracker

shows the individual trait ranking for Candidate **Jeremiah R. Bergman** for the trait Warmth. His ranking is “Very High”. After comments have been typed in, the manager would click on the **“Add” button** and that text would become part of the record on the IRT for that individual Candidate. The **Notes** can be **edited** by simply clicking on them with the mouse. The **“Add”** button would now say **“Update”**. To edit or delete a Note, simply delete the text in the box and click on the **“Update” button**. If there is no text in the box, the Note will be deleted.

- 18) To view an Individual Feedback Report for a particular candidate, simply **click on the link under the “Report” heading** either under the Overall score or under any Trait score. A separate window will open that you can view, email or print and close to return to the Interactive Report.

Using the “Metrics” button:

- 19) If you are currently using the Advanced Tracking features of the IRT which include changing a Candidate’s status from “S” – screened to “H” – hired and to “T” – terminated, you can click on the Metrics button to view statistics.
 - a. First, select the Time Period you wish to view Metrics for.
 - b. Click on the **Metrics** button in green in the upper left.
 - c. If your statistics are not complete or accurate, follow the instructions on the Metrics screen or use the Advanced Tracking Guide (found by clicking on the “Help” button on the IRT or at www.traitset.com).