Basics Guide to Using the Interactive Report Tracker (IRT)

<u>**Basic Features:**</u>

➢ *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*!

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.

6) The **"-" minus signs are tools to reduce the information displayed and** will **collapse a** Questionnaires or Trait Score category.   To remove a candidate from the report, click on the **"-" (minus) sign** just before the candidate's name and number.

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 [icon] for Internet Explorer (IE), [icon] for Netscape, or [icon] for Mozilla/Firefox. If the numbers are 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. **Reset This Time Period**

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

☑ (1) Strongest Style
☐ (2) Clever Style
☐ (3) Cautious Style
☐ (4) Weakest Style
[Update]

Work Ethic/Integrity (4.0)

☐ (4) Weakest Style
☐ (2) Clever Style
☐ (3) Cautious Style
☐ (1) Strongest Style
[Update]

Customer Service (4.0)

☐ (1) Sociable Style
☐ (2) Efficient Style
☐ (3)Caution Area-S
☐ (4)Caution Area-E
☐ (5) Weakest Style
[Update]

Leadership/Management Aptitude (4.0)

☐ (1)Supportive Style
☐ (2)Directive Style
☐ (3)Caution Area-S
☐ (4)Caution Area-D
☐ (5) Weakest Style

12) 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 "**Úpdate"** 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:

13) 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.**

14) 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:

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.

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

10/11/2007   5

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).