Advanced/Tracking Guide to Using the IRT

INTRODUCTION: ***This Guide assumes that you already know the basics of navigating in the new IRT and would now like to use the Create/Edit Positions, New Candidate and Candidate Manager features to add the Tracking features to your TraitSet™ Interactive Report Tracker. (If you do NOT already know the basics, click on link to the Basic Guide.)***

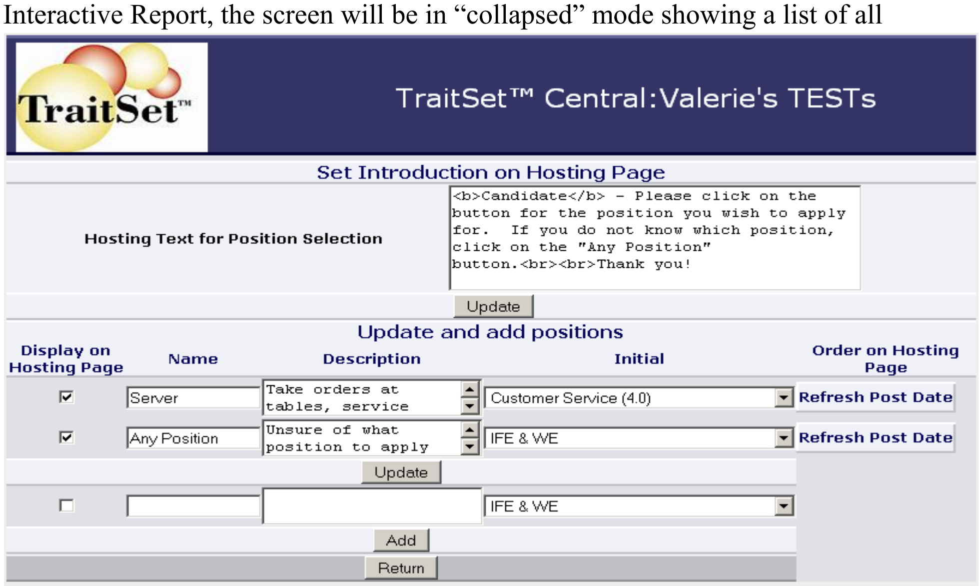
<u>Advanced/Tracking Features:</u>

- ***Create/Edit Positions:*** *Create job positions for your individual location or company and set descriptions and initial questionnaire from the new* ***Create/Edit Positions*** *button.*
- ***Candidate Manager:*** *Link all of a Candidate's questionnaire reports to one (1)* ***Candidate Manager*** *screen and:*
    - *Use the new* ***Candidate Manager*** *screen to set Candidate's status (screening, interview, hired, etc.).*
    - *Use the new* ***Candidate Manager*** *screen to launch additional questionnaires to the Candidate and view status of those questionnaires.*
    - *Use the new* ***Candidate Manager*** *screen to set interview, hire and termination dates with notes for each step in the hiring process.*
- ***New Candidate:*** *Launch/email initial or other questionnaires to new Candidates by using the* ***New Candidate*** *button. Using the* ***New Candidate*** *button, view "in-process" questionnaires.*
- ***Advanced Selecting/Narrowing Candidates to View:*** *Design your reports and screen to see only the Candidates with hiring status or job positions that you select from the new* ***Select Candidates*** *button.*
- ***Metrics:*** *Select a Time Period and see Turnover, Hires, Interviews and Terminations.*

Advanced/Tracking Steps

<u>*Create/Edit Positions:*</u>

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. You will also see at the top left of the screen the "**Create/Edit Positions"** button.



2) Click on the **Create/Edit Positions** button. The top box is the "**Set**

Introduction on Hosting Page". If you are going to use the "button" method and have a link on your web site to your TraitSet™ customized web page, you would type in any explanation you feel a Candidate might need before they choose a job position button. For example, "*Please apply for only one (1) job position!*" or you might say *"If you do not know which position to apply for, click on the* ***Any Position*** *button."*

3) The "default" position is "**Any Position**". You can now create as many job positions as you like. You can combine positions (such as "busser/expeditor", "host/hostess" or "cook/asst cook") if you often have candidates who might apply for both or either position.

4) Each position can also be assigned/linked to one (1) initial questionnaire(s), an Inquiry for Employment (IFE) or your customized application. The drop down box will show the applications/questionnaires that you have available on your TraitSet™ site. [NOTE: If you do not currently have your employment application available on TraitSet™ and wish to do so, contact your sales account rep or email sales@hrgems.com.

5) For each position, you can also write a description. This description will be available in the **Candidate Manager** page described below and also if you have a web button entry page linked to your company website. NOTE: If you need to change the ORDER of the positions on your web page, use the **"Refresh Post Date"** button and begin with the Position you wish to be at the bottom/last in the list and continue in order to the topmost or first position.

6) CAUTION: If you edit/change the name of a position, all previous candidates under that position will now have the name of that edited position. EXAMPLE #1: You change the position "Waiter/Waitress" to "Server". That would be fine as they are the same job just a different title. EXAMPLE #2: You change the position "Grill Cook" to "Pastry Chef". This would be incorrect as candidates who had applied for "Grill Cook" would not be most likely applying to be the "Pasty Chef". Those are two entirely different jobs.

Candidate Manager:

1) With the new **Interactive Report Tracker**, you can track your Candidates from the start of the **Screening** process, to **Interview**, to **Hire** and to **Termination** all on one screen! You can also change their job position as they are promoted or make lateral moves and launch additional questionnaires that may be appropriate for their new job position. All this is done from the new feature, **Candidate Manager**. Follow the steps below to setup the **Candidate Manager** for each of your applicants.

2) *Current Users of TraitSet™:* Begin with the first questionnaire (usually "Questionnaire (WE)" or "IFE & WE") and click on the Candidate's name. You are now in the Candidate Manager screen as shown below:

3) You will see the Candidate's **Name, Email** (if collected)**, Position** and **Status**. All Candidates who have completed the initial questionnaire or application are in the **"Screening Pool"** status.

4) Next to the Status are buttons to continue or end the hiring process. These buttons will be discussed in detail below.

5) Below the Status are a list of the Questionnaires available on your site. If a questionnaire listed has a button marked **"Report"**, the Candidate has completed that questionnaire and you may view their Individual Report by clicking on the "Report" button. If a questionnaire has two buttons marked **"Launch"** and **"Link"**, you have two choices:

   a. If this Candidate has already completed other questionnaires such as "Questionnaire (CS)", you may click on the "Link" button and all candidates that have completed the "Questionnaire (CS)" with the same or similar name will be shown. Click on the correct name and that questionnaire's report will be added to this Candidate's screen. Continue for any other questionnaires already completed by this Candidate.

b. If you would like this Candidate to complete additional questionnaires, click on the **"Launch"** button next to the questionnaire and as in the **"New Candidate"** screen (Step #8 below) you have two options for launching: Copy/paste the link into your own email or send an email directly to the Candidate. When you do this, the words "**In Process"** will appear next to that questionnaire.

c. Once this Candidate has completed the new questionnaire the **"Report"** button will appear.

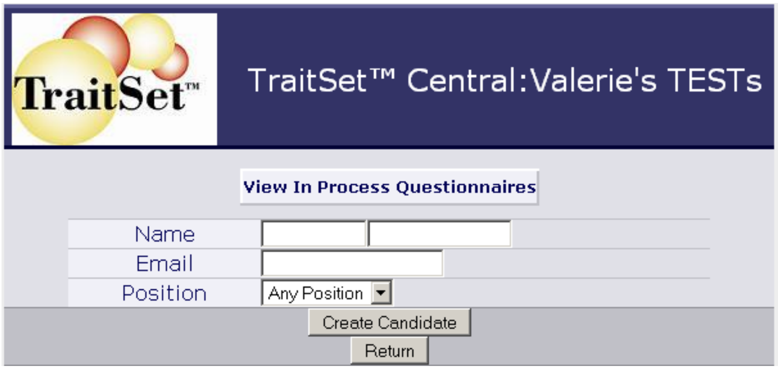
6) **Changing the Job Position:** If a Candidate has applied for the "cook" position but are more qualified, for example, for the "assistant cook" position, use the **"Change Position"** button at the lower right of the screen to select the new Position. This feature can be used for current employees that are promoting or moving laterally as well. The Positions screen will appear with additional radio buttons opposite each position. The Candidate's current position will already be selected. To change the position, click on the radio button opposite the new position and then click on the **"Update"** button at the bottom of the screen. If required by your company policy, additional questionnaires from the list can be launched as well.

7) **Tracking the Candidate:** The Status buttons (such as **Interview, End Process, Hire, Terminate**) can be used to move the Candidate along in the Hiring Process or to end the hiring process for that Candidate. The **Interview** button, for example, will bring up a calendar where the Interview Date can be set by clicking on the appropriate date. There is also a text box for notes such as the time of the Interview or notes you might making during the Interview. Just type in your notes and click on "Update Note". The following are the Hiring Process Statuses, Descriptions and Choices for you when the Candidate is in that status:

   a. **Screening Pool** – Candidate has taken at least one questionnaire
      i. **Interview** button: Click on this button to set Interview and Candidate will now be in Interview Pool
      ii. **End Process** button: Click on this button if Candidate is not going to be interviewed at this time. Candidate will be in "Not Interviewed" status. There will also appear a **Reconsider** button if at some point you wish to put the Candidate back in the Screening Pool.
   b. **Interview Pool** – Candidate has been scheduled for an Interview
      i. **Hire** button: Click on this button and select the Candidate's Start date from the Calendar. Candidate will show "Hired" status (H) in the IRT.
      ii. **End Process** button: Click on this button to defer hiring this Candidate at this time and the Candidate's status will be "Not Hired". There will also appear a **Reconsider** button if at some point you wish to put the Candidate back in the Interview Pool.
   c. **Hired** – Candidate shows Hired (H) on the IRT
      i. **Terminate – Voluntary** button: Click on this button if Candidate resigns/quits voluntarily. Candidate status will be Terminated – Voluntary. There is a place for notes as well. The Candidate will have a black "T" on the main IRT screen. There will also appear a **Rehire** button for if at some time this Candidate is rehired.
      ii. **Terminate – Involuntary** button: Click on this button if Candidate is being laid off or let go and, if desired, type in text as to reasons in the Notes section. Candidate status will show a "T" with color being red. There will also appear a **Rehire** button for if at some time this Candidate is rehired.
   d. **End Process** – At any stage of using the "End Process" button, the Candidate can be reconsidered and put back into either the Screening Pool or Interview Pool as desired. Candidate can also be "rehired" after either Termination process as well.

New Candidate:

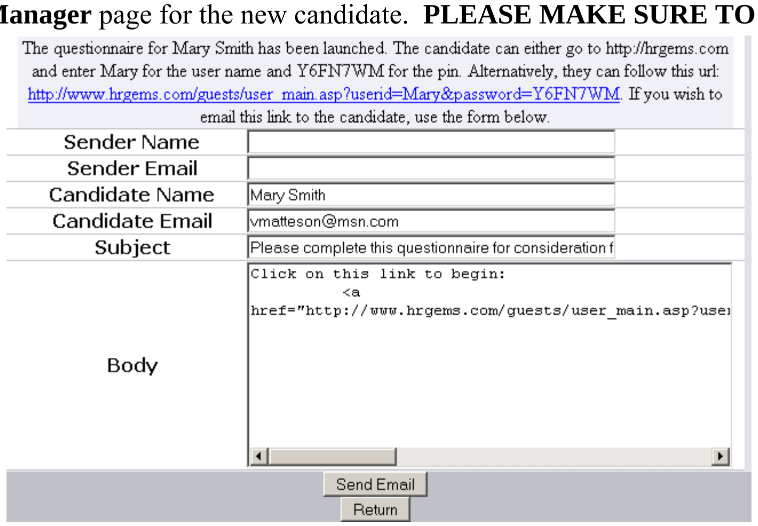
8) The next button you can use to send links/emails to new candidates is the "**New Candidate**" button, which is green.



Enter the person's name (First name in the first box and Last name in the last box), email address and select from the drop down the Position they are applying for.

9) You can also check on any other **New Candidates** to whom you have sent questionnaires by clicking on the **"View In Process Questionnaires"** button. From this view you can "close" or delete any old questionnaires of candidates that will not be applying or completing the questionnaire. For example, you have sent a questionnaire to a candidate on January 15, 2007 and on February 15, 2007 you "renotified" the candidate and the questionnaire is still not completed so you may assume the candidate is no longer interested and wish to delete this from the view. Simply click on the **"Close"** button in line with their name and questionnaire and that incomplete questionnaire will be removed from the view. If, however, you wish to re-send a link or correct a wrong email address, click on the **"Renotify"** button in line with the Candidate's name and the appropriate questionnaire and the "send" screen will appear as below when you click on "Create Candidate." You can then make the corrections to the email address as needed.

10) When you click on the "**Create Candidate**" button, a screen will appear with the option to either copy/paste a link into your own email or to add your **Sender Name** and **Sender Email** to the boxes provided and to edit the **Subject** line of the email and type in additional instructions besides the link that will be in the **Body** of the email. If you are just copying the link into your own email message, you may click on the **Return** button to go to the **Candidate Manager** page for the new candidate. **PLEASE MAKE SURE TO COMPLETE THE SENDER NAME AND EMAIL IF YOU ARE EMAILING THE LINK!!**

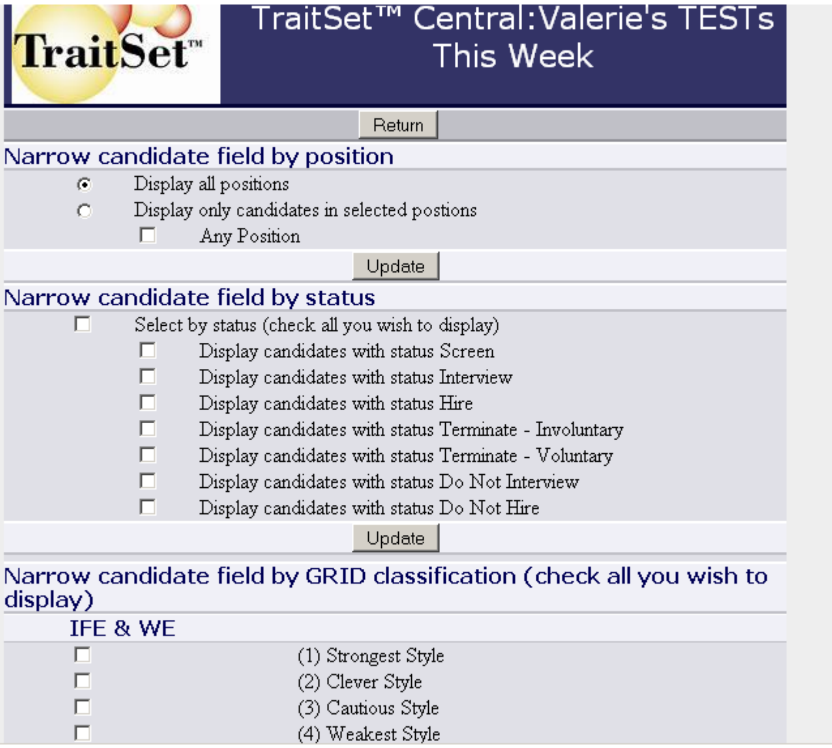


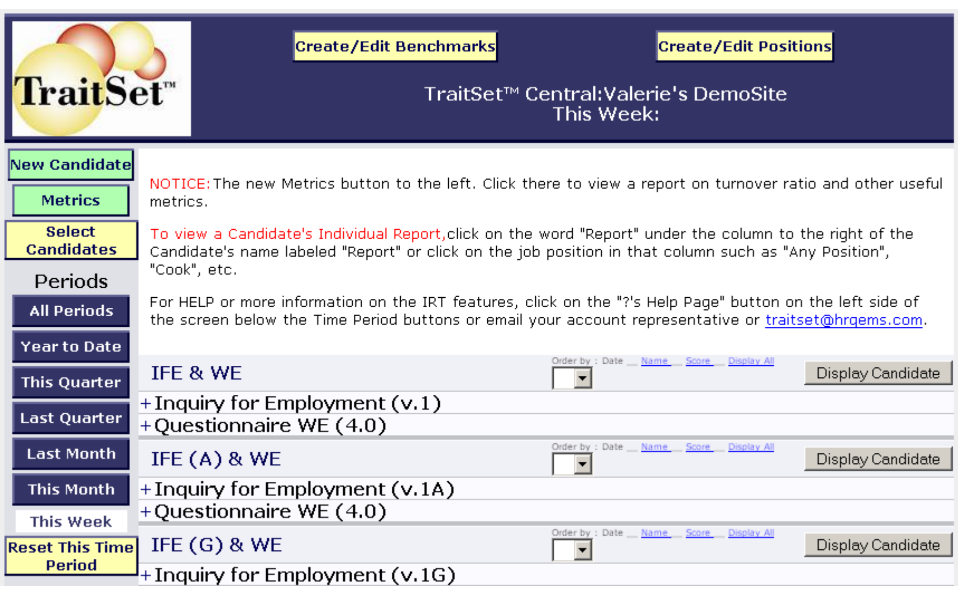
Narrowing Report by Category:

11) The new **"Select Candidates"** button at the top left margin of your screen allows you to view Candidates by **position** and by **status** as well as 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 on the next page. NOTE: Please select the **Time Period** you wish to view BEFORE going to the "Select Candidates" screen.

12) Using the "**Select Candidates"** button you can view Candidates who have completed a questionnaire by all **positions** (default) or by one or more specific positions if you have created them from the **Create/Edit Positions** button. You can also choose the hiring status. The default **status** for candidates is **S or Screening Pool**. From the

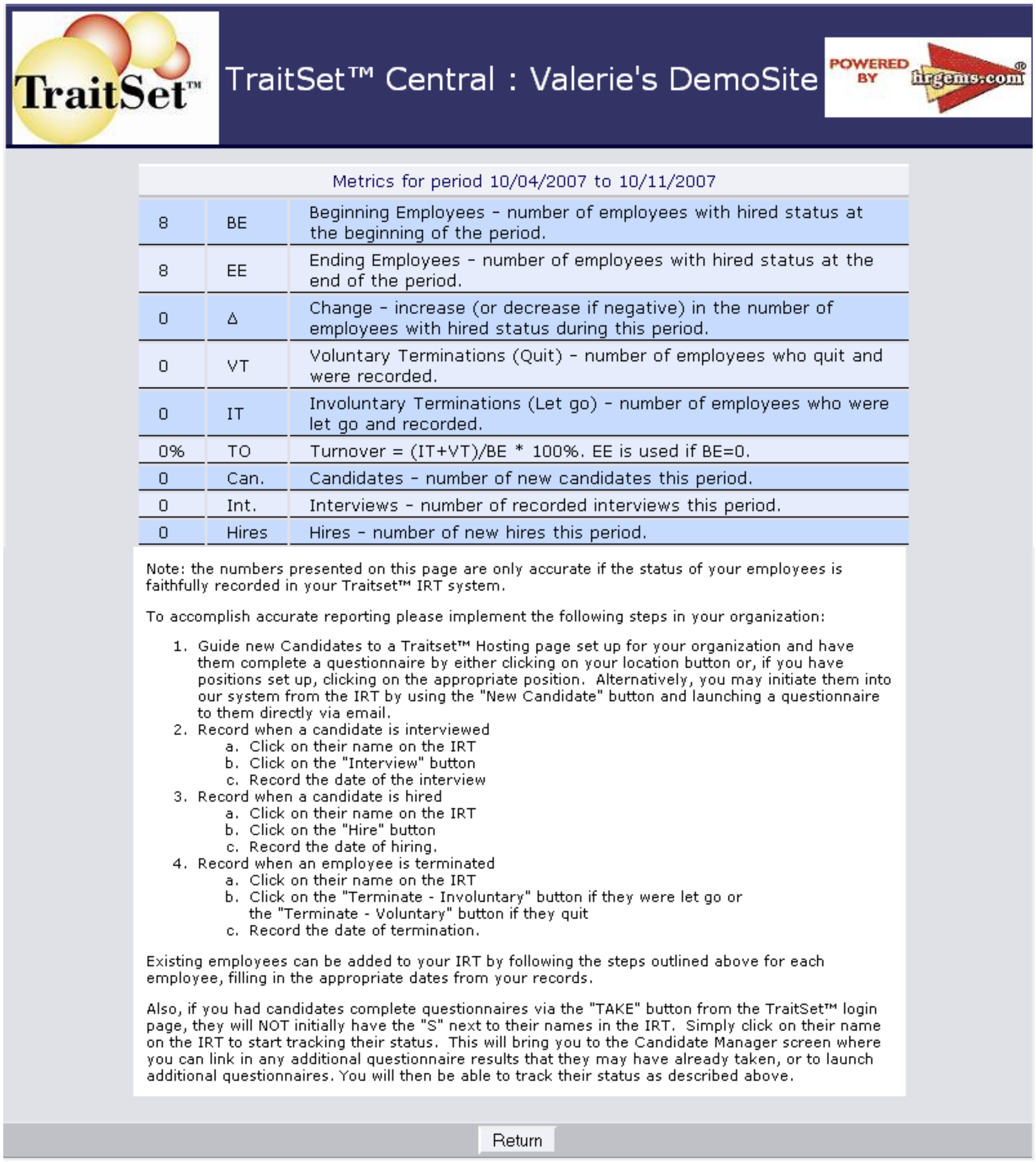
selections shown you can see all statuses (default) or just choose to viewing **Screening Pool, Interviewing Pool, Hired** or **Terminated** as shown on the screen print above. You can also use the GRID classification as well or all three selection types together such as set **Position = Server**. Set **Status = Screening Pool**. Set **Grid Classification = Strongest Style for WE**.. Be sure to ALWAYS click the "**Úpdate"** button on the **Select Candidates** screen before clicking on the **Return** button to go back to viewing the report.





Metrics

13) To view and use the new **Metrics** feature, click on the green **"Metrics"** button shown above that is below the **"New Candidate"** button. The following screen will appear if you are a manager of one (1) location:



TraitSet™ Central : Valerie's DemoSite

Metrics for period 10/04/2007 to 10/11/2007

8	BE	Beginning Employees - number of employees with hired status at the beginning of the period.
8	EE	Ending Employees - number of employees with hired status at the end of the period.
0	Δ	Change - increase (or decrease if negative) in the number of employees with hired status during this period.
0	VT	Voluntary Terminations (Quit) - number of employees who quit and were recorded.
0	IT	Involuntary Terminations (Let go) - number of employees who were let go and recorded.
0%	TO	Turnover = (IT+VT)/BE * 100%. EE is used if BE=0.
0	Can.	Candidates - number of new candidates this period.
0	Int.	Interviews - number of recorded interviews this period.
0	Hires	Hires - number of new hires this period.

Note: the numbers presented on this page are only accurate if the status of your employees is faithfully recorded in your Traitset™ IRT system.

To accomplish accurate reporting please implement the following steps in your organization:

1. Guide new Candidates to a Traitset™ Hosting page set up for your organization and have them complete a questionnaire by either clicking on your location button or, if you have positions set up, clicking on the appropriate position. Alternatively, you may initiate them into our system from the IRT by using the "New Candidate" button and launching a questionnaire to them directly via email.
2. Record when a candidate is interviewed
   a. Click on their name on the IRT
   b. Click on the "Interview" button
   c. Record the date of the interview
3. Record when a candidate is hired
   a. Click on their name on the IRT
   b. Click on the "Hire" button
   c. Record the date of hiring.
4. Record when an employee is terminated
   a. Click on their name on the IRT
   b. Click on the "Terminate - Involuntary" button if they were let go or the "Terminate - Voluntary" button if they quit
   c. Record the date of termination.

Existing employees can be added to your IRT by following the steps outlined above for each employee, filling in the appropriate dates from your records.

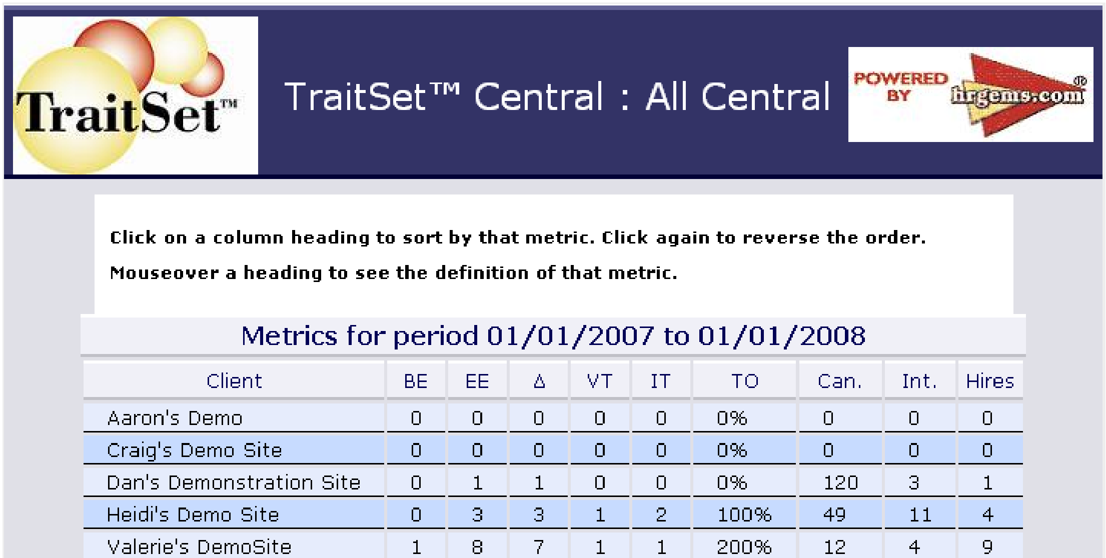
Also, if you had candidates complete questionnaires via the "TAKE" button from the TraitSet™ login page, they will NOT initially have the "S" next to their names in the IRT. Simply click on their name on the IRT to start tracking their status. This will bring you to the Candidate Manager screen where you can link in any additional questionnaire results that they may have already taken, or to launch additional questionnaires. You will then be able to track their status as described above.

Return

14) The top of the screen are your Metrics listed for the Time Period you had selected in the IRT, if this is NOT the Time Period you wish to view, simply scroll to the bottom of the screen and click on **"Return".** The Metrics available are: Beginning Employees, Ending Employees, Change (Increase/Decrease in Employees), Voluntary Terminations, Involuntary Terminations, Turnover (TO) as a %, # of Candidates during this time period, # of Interviews during this time period and # of Hires during this time period.

15) If you wish to use this for ALL employees, follow the instructions listed below the Metrics. If you are not using the Traitset™ IRT system as noted in the above instructions, your Metrics will not be accurate.

16) If you are a regional or corporate CRM/Summary report, your **Metrics** screen will have a matrix at the top as shown below. In this case, the type of Metric is shown across the top and the Client or Location is shown along the side. These can be sorted by ANY of the columns by clicking on the header (Client, BE, EE, Δ, VT, IT, TO, Can., Int., Hires). As with the one location instructions, ALL locations (Clients) MUST be using the Traitset™ IRT system as described in the instructions below the Metrics matrix.



Client	BE	EE	Δ	VT	IT	TO	Can.	Int.	Hires
Aaron's Demo	0	0	0	0	0	0%	0	0	0
Craig's Demo Site	0	0	0	0	0	0%	0	0	0
Dan's Demonstration Site	0	1	1	0	0	0%	120	3	1
Heidi's Demo Site	0	3	3	1	2	100%	49	11	4
Valerie's DemoSite	1	8	7	1	1	200%	12	4	9

17) If you have any questions on using the Traitset™ IRT system as described in the **Metrics** instructions, please contact your Traitset™ Account Representative or email traitset@hrgems.com