

Getting started with iRatio

Step by step instructions on how to sign up, register your business, add positions and employees, and create performance reviews.

- 1 Fill in your information to create your profile.



The image shows a sign-up form for iRatio. At the top is the iRatio logo, which consists of a stylized 'X' inside a square frame. Below the logo are two links: 'Login' and 'Sign Up', with 'Sign Up' being underlined. The form contains several input fields: 'FIRST NAME' with a text input field, 'LAST NAME' with a text input field, 'DATE OF BIRTH' with three dropdown menus (year, month, and day), and 'PHONE NUMBER (CELL)' with a text input field.

- 2 Check your email to confirm and activate your account.

Account has been created. Check your email inbox for an activation link. You can log into your account to resend the activation email.

Close

3 Once verified, log into your account.



iRatio

[Login](#) [Sign Up](#)

EMAIL

exampleperson@irato.ca

PASSWORD

REMEMBER ME

LOGIN

4 Welcome to iRatio wizard.

Welcome to iRatio

Thank you for signing up!

This wizard will introduce you to iRatio features and functionality and help you setup your business if you're a business owner.

If you don't wish to continue with the wizard, feel free to close it at any time. You can use the menu to come back to the wizard whenever you like.

Cancel

Next

ADDRESS

5 How it works. The basics.

How It Works

Here are the basics:

- Each business is verified before their profile is activated.
- Employer sends an employment request to their employees.
- Employee has the option to:
 - ACCEPT - Confirms your employment at the business and allows your employer access to your iRatio profile.
 - REJECT - If you are not employed by this business you can reject the request.

The employer will only have access to your profile if the employment request is accepted.

[Back](#) [Cancel](#) [Next](#)

6 Business roles

Select Employee Role

Select the access level role that this employee should be assigned to the business account:

Employee

As an *Employee*, they can:

- View their own profile
- View this business profile
- See a list of their co-workers and their positions

They will NOT have access to any co-worker profiles.

As a *Manager*, they can also:

- View and leave reviews for employees (or lower-level managers) below them
- Add or remove employees (or lower-level managers) below them

They will NOT have access to profiles of employees that are outside of their management branch.

As an *Administrator*, they can also:

- Add or remove job positions from the business
- Access past employee records (if available)

As an *Owner*, they can view everything in the business and access all functionality.

[Cancel](#) [Next](#)

Performance Reviews

Once a review is left for an employee:

- The reviewer has 72 hours to edit/delete the review if needed.
- If the employee disagree's with the review, they have 7 days to dispute their review.
- The Account Manager then has 30 days to resolve any disputed reviews.

Back

Cancel

Next

ADDRESS

8

Getting started.

Let's Get Started!

Are you an

Employee

Or

Employer

Back Cancel

ADDRESS

9

Once all your business information is submitted, we will verify it. Only legitimate businesses will be approved.

ADDRESS

123 Example Drive

Suite, Unit, Building (optional)

CO

Ca

ST

Al

CITY

Example Town

POSTAL / ZIP CODE

Your registration has been received and will be reviewed shortly.
Please expect a call and/or an email. Thank you!

Close

10 Business page setup

Setup Business

Thank you for registering your business with iRatio. We look forward to helping you keep track of your employee's work performance, while helping them be the best employee they can be.

While our team reviews and verifies your registration, we encourage you to get the initial business setup complete. Please read and follow each step carefully.

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Cancel

Next

ADDRESS

11

Manager review evaluation configuration. Please contact us to add more review categories.

Evaluation Configuration

Manager evaluations can be submitted by employees to review their managers.

Manager Evaluations Enabled

Select at least 3 categories you want employees to provide ratings on when they leave this evaluation:

- Attendance
- Customer/Client Satisfaction
- Dependability
- Punctuality
- Working with Others
- Confidence
- Multitasking
- Professionalism
- Patience
- Performance

Back Cancel Next

12

Co-worker review evaluation configuration. Please contact us to add more review categories.

Evaluation Configuration

Coworker evaluations can be submitted by employees to review their coworkers.

Coworker Evaluations Enabled

Select at least 3 categories you want employees to provide ratings on when they leave this evaluation:

- Attendance
- Customer/Client Satisfaction
- Dependability
- Punctuality
- Working with Others

Back Cancel Next

Example: Alberta: FOXUMU

- 13 Next step, add the positions in your business.

Add Positions

The next step is to add positions that employees can be assigned to. Employees can be added to your business account without assigning them to a position as well, you just won't be able to leave reviews for them until you assign them a position.

Add Position

You can click 'Next' if you would like to skip adding positions for now.

Back

Cancel

Next

- 14 Write the name of the position and a brief description.

Add Position

Enter the title your company uses for this position:

Position Name

Enter a description, which can contain information such as the responsibilities of the position and can be viewed when leaving reviews:

Position Description (optional)

On the next step you will select the closest matching position type so we can offer appropriate review categories for this position and group rating summaries by the type of position this is.

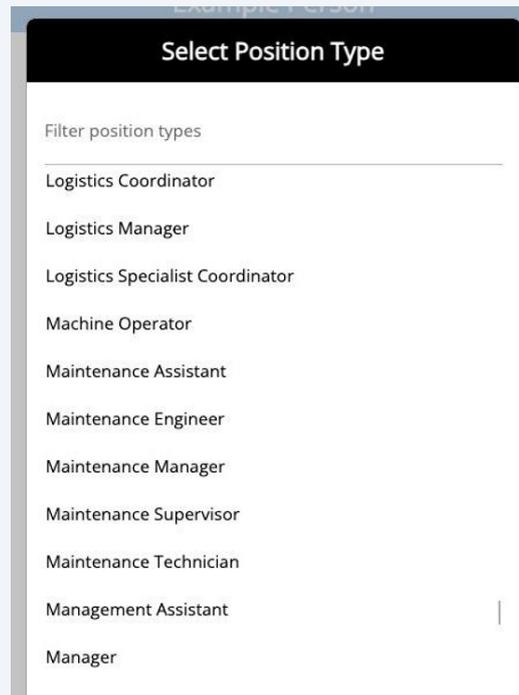
Keep in mind that you can add multiple positions of the same type. For example, if you have a car shop you might have a 'Senior Mechanic' and 'Junior Mechanic' position, both assigned the 'Auto Mechanic' position type. Each position can have different performance review criteria that is appropriate for that position.

Back

Cancel

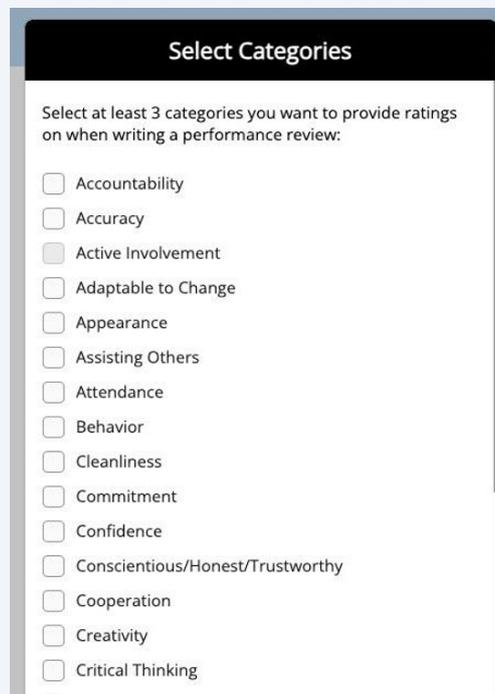
Next

15 Select the position type it apply's to.



The screenshot shows a mobile application interface titled "Select Position Type". At the top, there is a search bar labeled "Filter position types". Below the search bar is a list of position types. The list includes: Logistics Coordinator, Logistics Manager, Logistics Specialist Coordinator, Machine Operator, Maintenance Assistant, Maintenance Engineer, Maintenance Manager, Maintenance Supervisor, Maintenance Technician, Management Assistant, and Manager. A vertical scrollbar is visible on the right side of the list, indicating that there are more options available.

16 Select review categories applicable to that position.



The screenshot shows a mobile application interface titled "Select Categories". Below the title, there is a text prompt: "Select at least 3 categories you want to provide ratings on when writing a performance review:". Below this prompt is a list of categories, each with an unchecked checkbox. The categories listed are: Accountability, Accuracy, Active Involvement, Adaptable to Change, Appearance, Assisting Others, Attendance, Behavior, Cleanliness, Commitment, Confidence, Conscientious/Honest/Trustworthy, Cooperation, Creativity, and Critical Thinking. A vertical scrollbar is visible on the right side of the list, indicating that there are more categories available.

17 Pick the frequency you want the reports due.

Select Review Frequency

Select the frequency that reports are due for this position or 'Unspecified' to disable notifications for due/overdue reports:

- Unspecified
- Monthly (12 per year)
- Bimonthly (6 per year)
- Quarterly (4 per year)
- Triannually (3 per year)
- Semiannually (2 per year)
- Annually (1 per year)

EXAMPLE, ALBERTA, EXCLUSIVE

18 Select the exact frequency date.

Select Review Frequency

Select the frequency that reports are due for this position or 'Unspecified' to disable notifications for due/overdue reports:

Quarterly (4 per year)

First month of each year report is due:

January

Day of the month report is due:

10

Based on your settings, the next 5 reports will be due:

- 2025-04-10
- 2025-07-10
- 2025-10-10
- 2026-01-10
- 2026-04-10

19 Position summary



Info People Reports Positions

Position Summary

Name:

Customer support

Position Type:

Customer Service Representative

Review Categories:

Assisting Others, Customer/Client Service & Support, Friendliness, Knowledge, Patience, Professional Demeanor

Report Frequency:

Quarterly (4 per year) starting on January 10 of each year

Back

Cancel

Save



Important! Make sure to add all the positions in your business before continuing. Only (Administrative Role) will have the ability to add more positions.

Add More Positions

Click the button below if you would like to add another position:

Add Position

Back

Cancel

Next

ADDRESS

20 Next step is to add your employees

Add Employees

Now that you are done creating positions, it is time to add some employees. You will need their email addresses to send them employment requests.

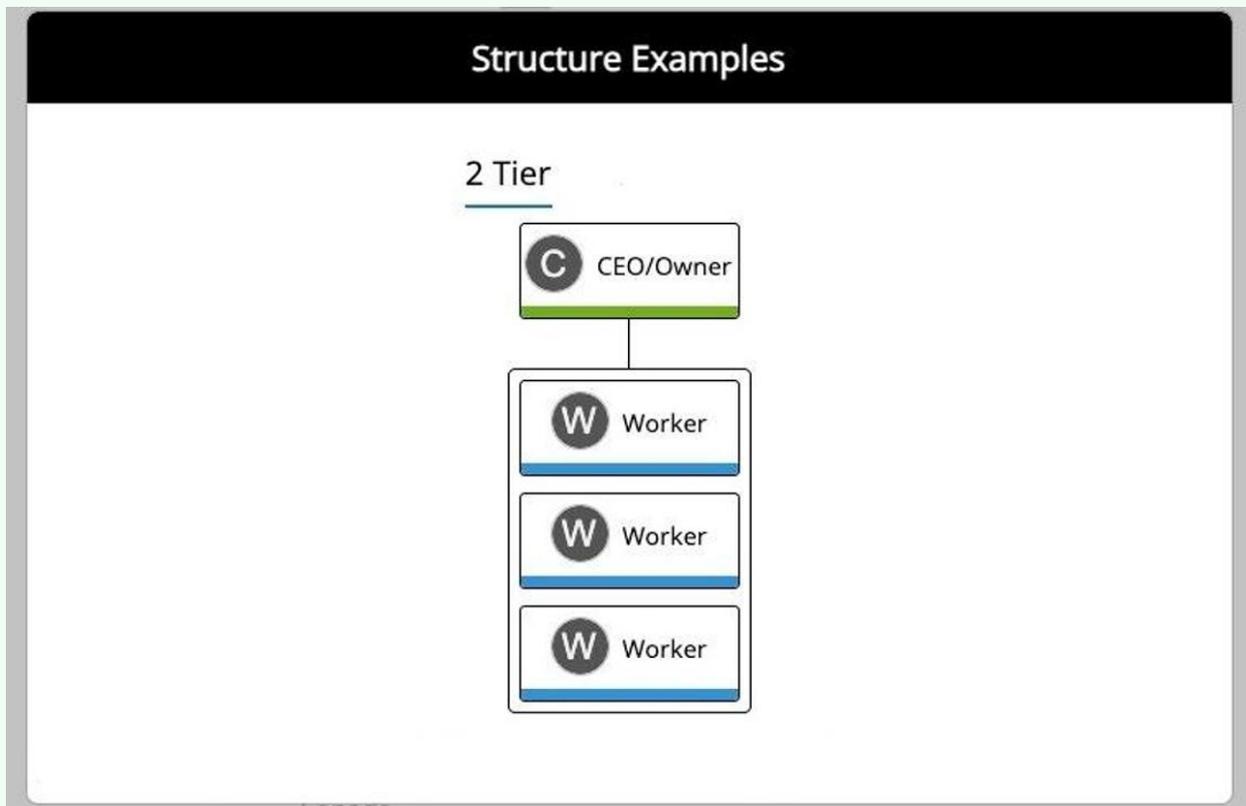
Based on your business structure, first add the employees directly under you. [Click here to see some examples of business tiers.](#)

If you are adding managers that have other employees under them, those employees can be added by the manager (or by you) after the manager accepts their employment invitation to your business.

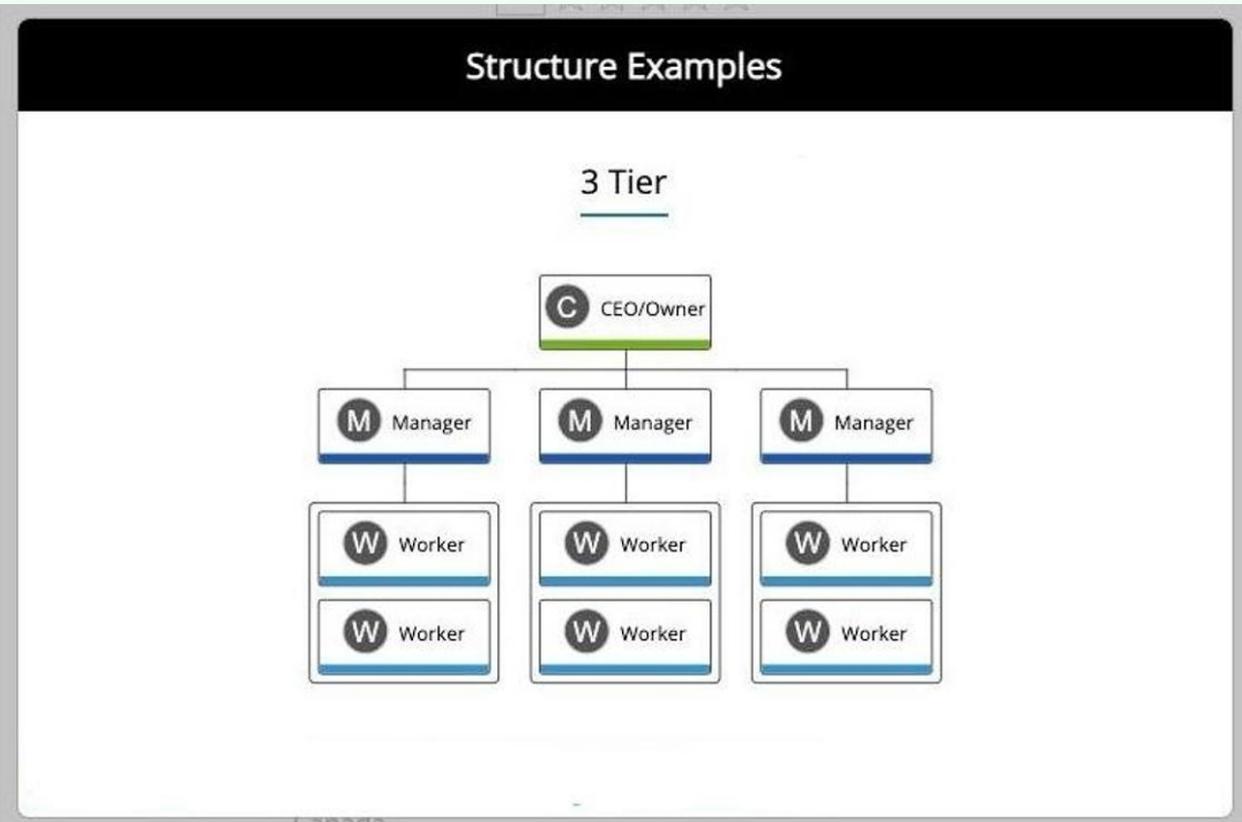
Add Employee

Back Cancel Next

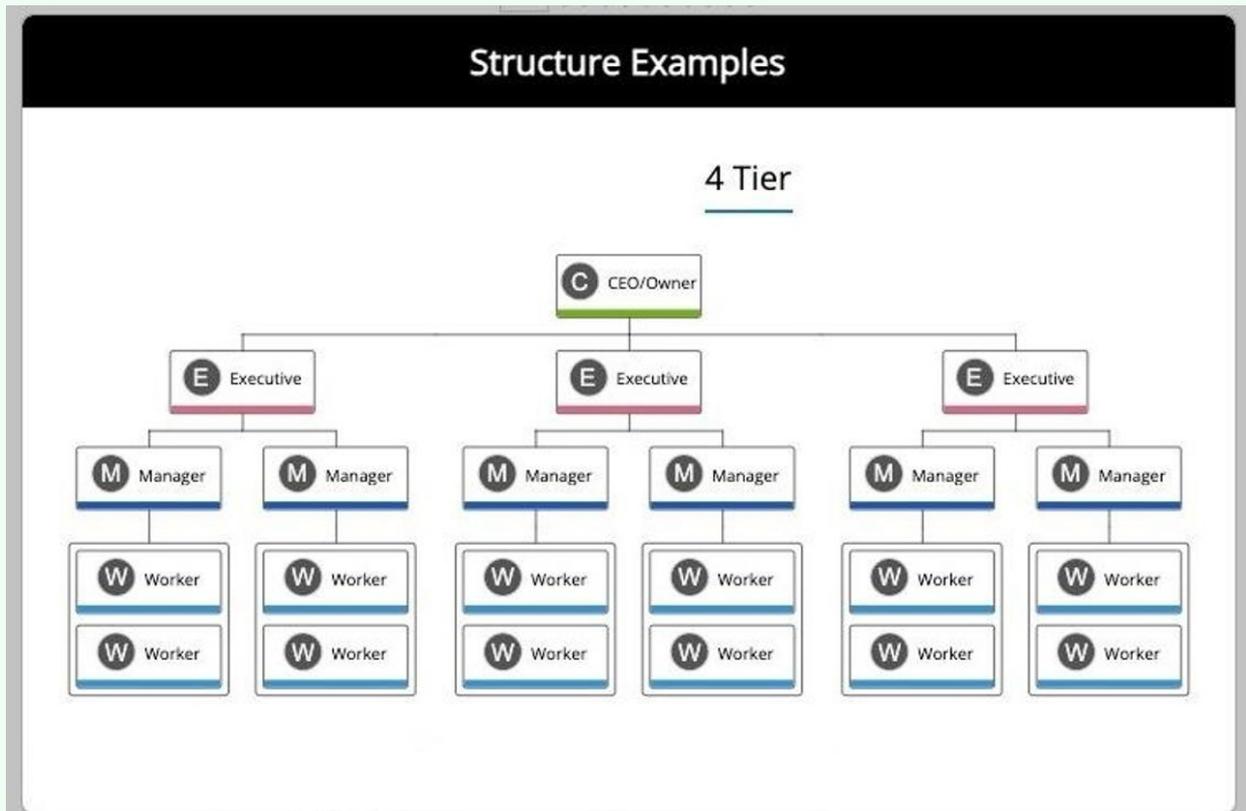
i Example! 2 Tier structure



i Example! 3 Tier structure



i Example! 4 Tier structure



21 Add employees by entering their email

Add Employee

Enter the employee's email address:

exampleperson@iratio.ca

Back Cancel Next

22

Select the employees role

Select Employee Role

Select the access level role that this employee should be assigned to the business account:

▼

As an *Employee*, they can:

- View their own profile
- View this business profile
- See a list of their co-workers and their positions

They will NOT have access to any co-worker profiles.

As a *Manager*, they can also:

- View and leave reviews for employees (or lower-level managers) below them
- Add or remove employees (or lower-level managers) below them

They will NOT have access to profiles of employees that are outside of their management branch.

As an *Administrator*, they can also:

- Add or remove job positions from the business
- Access past employee records (if available)

As an *Owner*, they can view everything in the business and access all functionality.

[Back](#) [Cancel](#) [Next](#)

23 Assign them a position

Select Positions

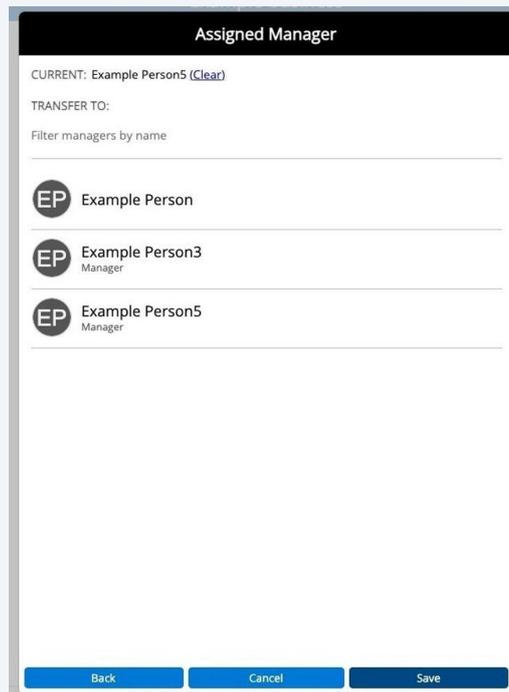
Select the positions that this employee should be assigned:

- Customer support
- Manager
- Marketing promoter
- Sales Rep

You can assign an employee to zero, one, or even multiple positions if they wear many hats. If they are assigned multiple positions then you will be prompted for which position you are leaving a performance review for.

[Back](#) [Cancel](#) [Next](#)

24 Assign them to a manager



The 'Assigned Manager' dialog box has a black header with the title 'Assigned Manager'. Below the header, it shows 'CURRENT: Example Person5 (Clear)'. Underneath is the 'TRANSFER TO:' section with a search prompt 'Filter managers by name' and a text input field. A list of three manager options is displayed, each with a circular 'EP' icon: 'Example Person', 'Example Person3 Manager', and 'Example Person5 Manager'. At the bottom, there are three buttons: 'Back', 'Cancel', and 'Save'.

 Tip! For those who don't yet have an iRatio profile, an email notification to register will be sent out once the business is approved.

An existing user with this email address was not found.
An invitation to join iRatio will be sent to 'exampleperson1@iratio.ca' once this business is approved.
Please check spam folders if the email is not in the inbox.

Close



Tip! For those who already have an iRatio profile, an email notification to join your business will be sent out once the business is approved.

Employment request will be sent to Example Person2 once this business is approved.

Close



Important! Make sure to add all employees that will have an Administrative role.

Add More Employees

Employee added successfully.

Click the button below if you would like to add another employee:

Add Employee

Back

Cancel

Next

ADDRESS

25

Business setup is complete. NOW you can leave initial reviews.

Setup Complete

You are all done setting up your business profile!

You can go to the [Reports tab](#) on your business profile page to leave an initial reviews for employees that you have assigned positions to before they accept the position. The review will be processed and submitted when the employee accepts the position. Once our team has verified your business, your profile will be activated and your employment requests will be sent out.

For more information or to contact us, please visit our website at www.iratio.ca.

Thank you for registering your business.

Back

Finish



Tip! Business will show up at the bottom of your main profile page. Select the business to view the profile page.

The screenshot shows the 'Example Person' profile page. At the top, there's a blue header with the name 'Example Person'. Below it are tabs for 'Info', 'Summary', and 'Reports'. The 'Info' tab is selected. The profile details include: 'ABOUT' with 'Nothing here yet...'; 'PHONE' as '5191234567'; 'EMAIL' as 'exampleperson@iratio.ca'; 'DATE OF BIRTH' as 'April 5, 1992 (age 32)'; and 'ADDRESS' as '123 Example st, Example, Alberta, E0X0M0, Canada'. There is an 'Edit Profile' button. Below the profile details are sections for 'Pending Businesses' (showing 'Example business' at '123 Example Drive, Example Town, AB') and 'Current Employments' (showing 'No employments found.'). At the bottom, there are 'Home' and 'Menu' icons.

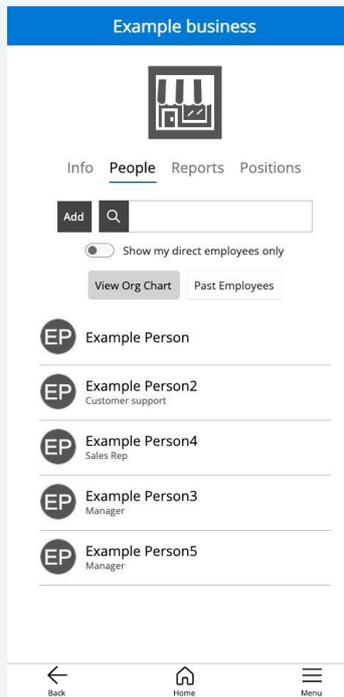
26

Business profile, "Info"

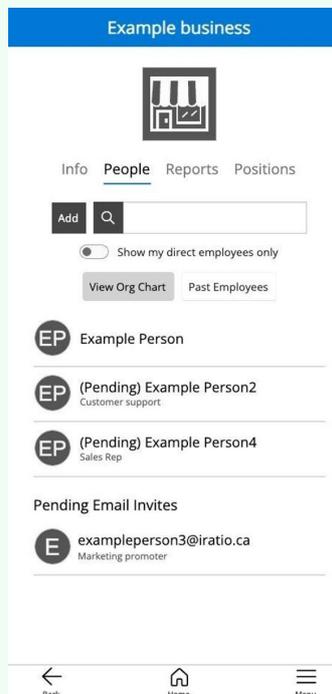
The screenshot shows the 'Example business' profile page. At the top, there's a blue header with the name 'Example business'. Below it is a business icon. There are tabs for 'Info', 'People', 'Reports', and 'Positions'. The 'Info' tab is selected. The business details include: 'TYPE' as 'Marketing'; 'PHONE' as '5191234567'; 'EMAIL' as 'examplebusiness@iratio.ca'; 'WEBSITE' as 'www.examplebusiness.ca'; and 'ADDRESS' as '123 Example Drive, Example Town, Alberta, E0X0M0, Canada'. There are 'EVALUATIONS' for 'Manager Evaluations: Enabled' and 'Coworker Evaluations: Enabled', with a 'Configure' button. At the bottom, there's a question 'Has your business information changed?' with an 'Email us' link. The bottom navigation bar includes 'Back', 'Home', and 'Menu' icons.

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Business profile, "People" (once business is verified and employees accept pending invitations).

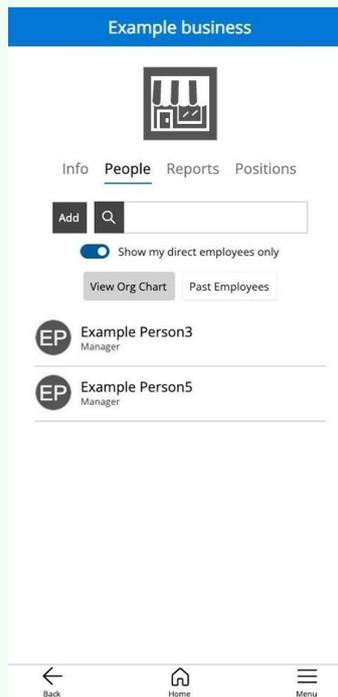


Tip! Business profile, "People". Employees who already have an iRatio profile will appear with (Pending). Those who do not have an iRatio profile will show up under (Pending email invites).

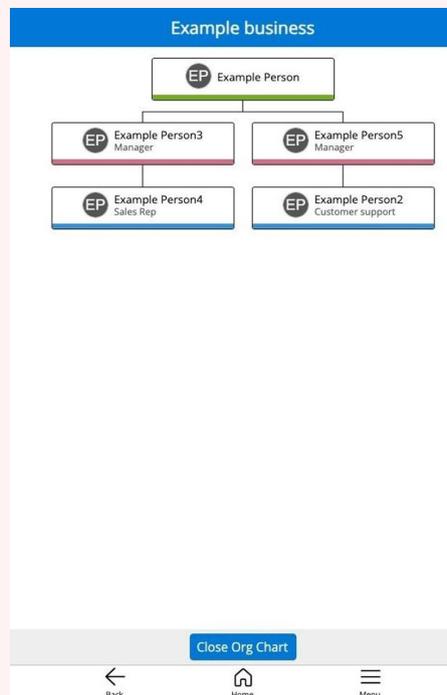




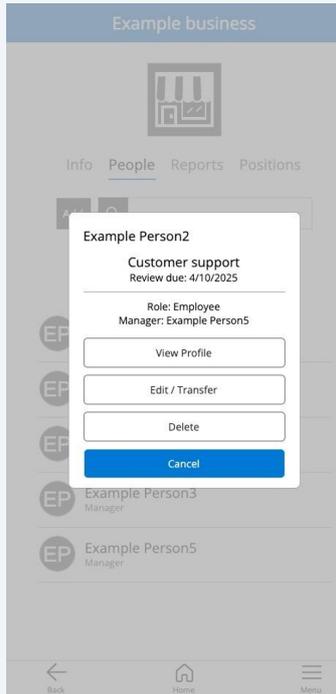
Tip! You have the option to view your direct employees only



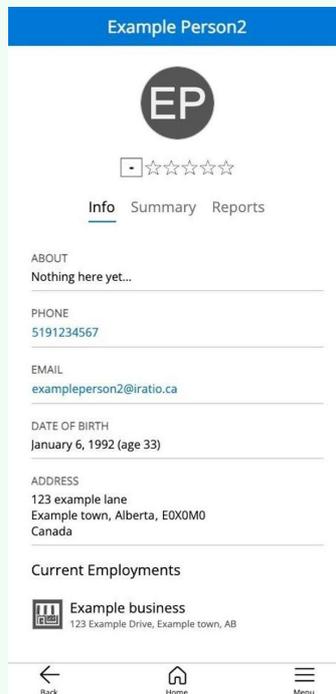
Note! Select "View Org Chart" to see business structure breakdown



28 Select employee to view more options.

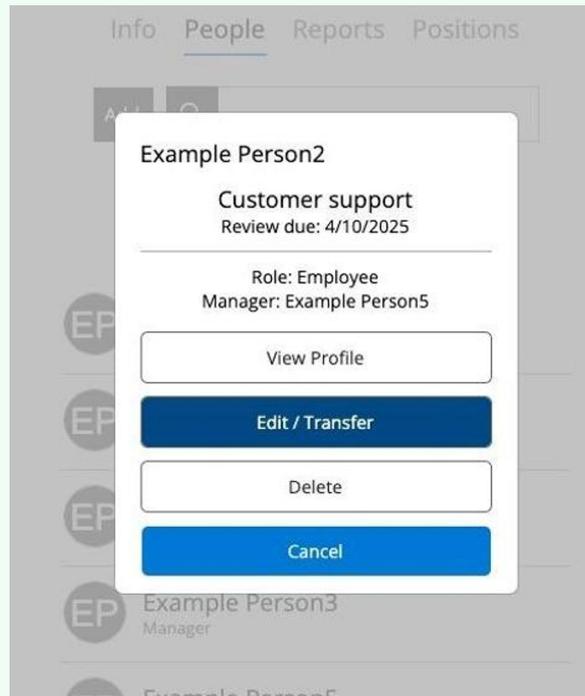


 "View profile" option, will show selected employees profile.



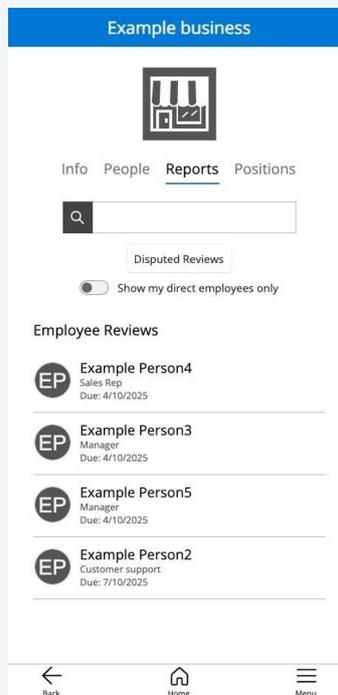


"Edit/Transfer" option, allows you to change their role, position, or assign them a new manager.

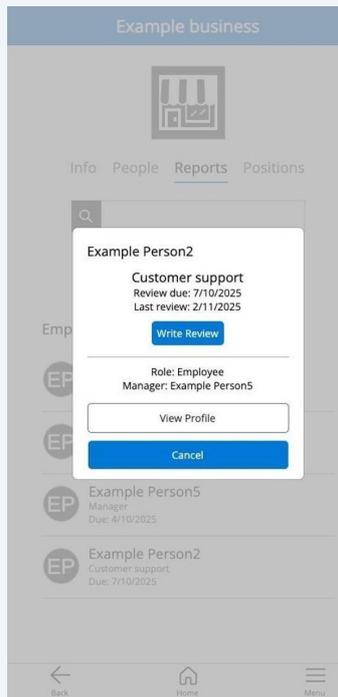


29

Business profile, "Reports"



30 Select employee to write a review, or view their profile

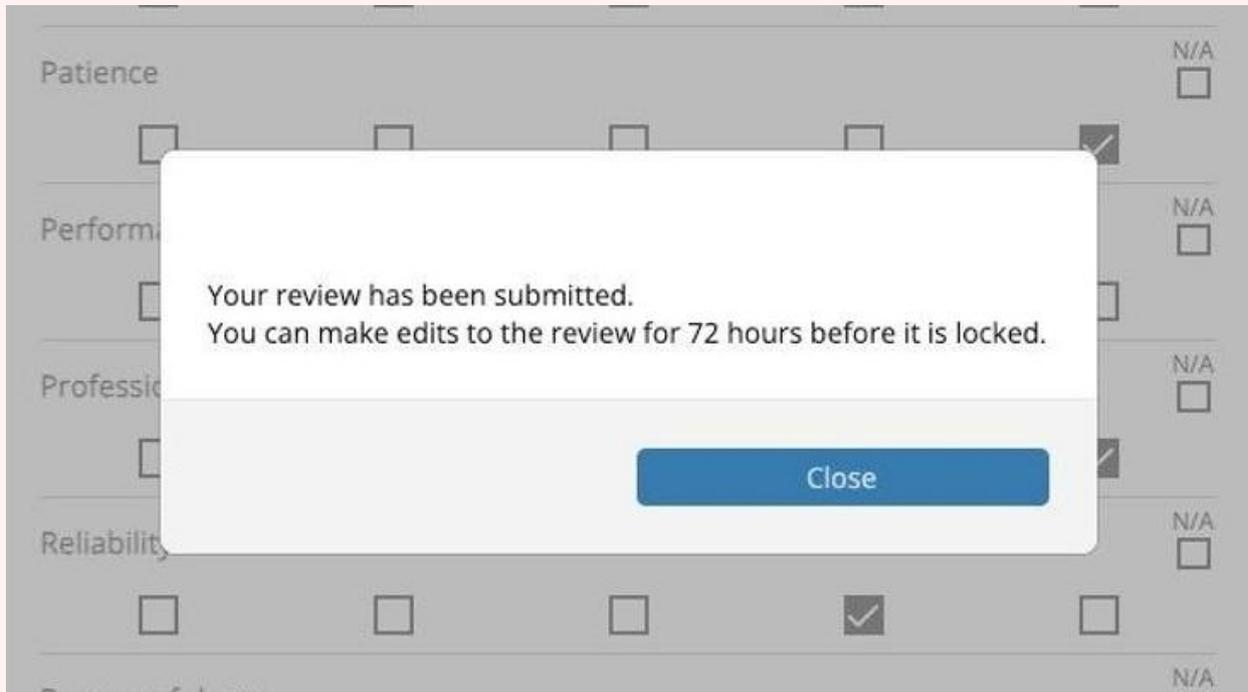


31 Performance review. Rate each category. Overall rating automatically averages out



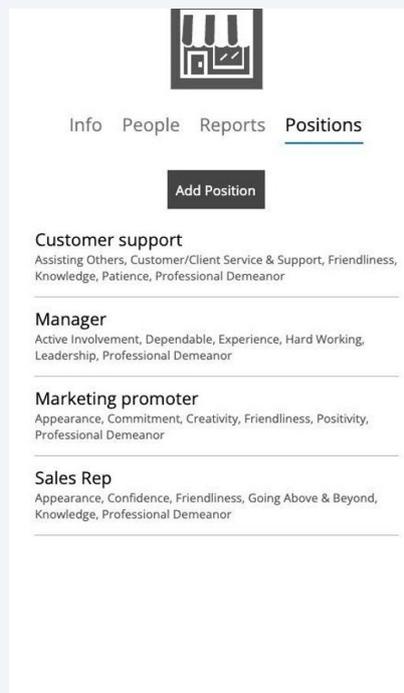


Important! Once a review is left, you have 72 hours to modify or remove it. The employee has 7 days to dispute the review if they disagree. If a review gets disputed, the person in a higher role will have 30 days to resolve the disputed review.



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Business profile, "Positions". You can add more positions at any time.





Tip! Select an existing position, to edit or delete it.

Customer support

Description:

Responsible for assisting customers by answering inquiries, resolving complaints, and providing product or service information. Their duties include handling customer interactions via phone, email, chat,

Edit

Delete

Cancel

Sales Rep

Appearance: Confidence, Friendliness, Going Above & Beyond