



## SESSION SETUP INSTRUCTIONS FOR MULTI-RATER PROFILES

Log in to [tracommmax.com](http://tracommmax.com)

To add a new Session, go to the Sessions tab on the toolbar and select Add Session:

The screenshot shows the MAX Admin Dashboard with the Sessions tab selected. A dropdown menu is open under the Sessions tab, showing options: Add Session, Manage Session, and Create Session from Auto-Enrollment. An arrow points to the 'Add Session' option. Below the menu is the 'Admin Dashboard' section with a 'DASHBOARD FILTER' area containing fields for Session ID, Filter by Client (All Clients), and/or Admin (Myself Only, All Admins, Admin), and/or Date (From 29 Jul 2021, To 27 Aug 2021). There is also a 'Display Learner Data Status' checkbox. Below the filter is the 'ADMIN TO DO'S' section with a table showing no data. At the bottom is the 'SESSION INFORMATION CENTER' section with an 'Active' table.

Session Name	Session Date or Due Date	Client Name	Learners	Not Started	Started	Sufficient	Generated	Existing
Developing Behavioral EQ (12)	02 Aug 2021	Axtion Toys	25	6	7	0	9	3
Improving Behavioral EQ for Success BEQ (15)	02 Aug 2021	Axtion Toys	19	8	4	1	5	1
Using Adaptive Mindset for Success (22)	02 Aug 2021	Axtion Toys	18	8	4	0	6	0

Choose the correct client for your session:

The screenshot shows the 'Add a New Session' form. It has an 'Instructions' section and a 'CLIENT LIST' section with a dropdown menu for Client (Axtion Toys) and a 'Select' button. Below is the 'CLIENT TREE' section with a 'Search Criteria' field. The 'TREE RESULTS' section shows a tree structure with 'Axtion Toys' as the root, and 'AT Sub-Client' and 'AT Sub-Client\_demo' as children. An arrow points to 'AT Sub-Client\_demo'. To the right of the tree is a 'Products' table.

Item	Active/Remaining Qty
SOCIAL STYLE v3 Multi	100
SOCIAL STYLE v3 Self	50

Choose the correct product for your session, then click Submit.

Client Name Axtion Toys>>AT Sub-Client\_demo

**Session Setup** Instructions: Select the product to be used for this session. Then, select the default language for Learner emails and reports. You will have the ability to change the language choice for each individual on a later screen.

**SESSION INFORMATION**

Product

**SESSION LANGUAGES**

**EMAIL**

Default Language

**LEARNER REPORTS**

Default Language

### **Session Details:**

- Session Name: Enter the name of your session. It should reflect the training materials or team as needed (for example, SOCIAL STYLE UMBD Training). The Session Name will appear on emails, to-do lists, and profile reports.
- Session Start Date: The Session Start Date is the date of your actual training – the date that learners attend an instructor-led training. After this date, no further invitations, reminders, or any other emails will be sent out of the MAX system. Ideally, all work for the session is completed before this date.  
\*\*Learners should begin completing tasks well BEFORE the Session Start Date.
- Session Administrator: This will default to the Client Administrator who is logged in and setting up the session.
- Session Facilitator: The Session Facilitator is an individual who may have limited access to the session, to monitor progress, download and print reports. This person may NOT be an Administrator in the MAX system.

Review the settings for your Session, then click Save.



Client Name Axtion Toys>>AT Sub-Client\_demo



### Session Setup

**Instructions** Please complete the information for this session. Then click the SAVE button.

Save Cancel

Quick Links: [Session Product](#) | [Session Languages](#) | [Session Details](#) | [Session Administrator](#) | [Session Facilitators](#) | [Training Facility](#) |

#### SESSION PRODUCT

Change Product

**Product** Learning Survey>>SOCIAL STYLE v3>>Multi-Rater SOCIAL STYLE Profile v3

**Type:** Normal

#### SESSION LANGUAGES

Change Languages

##### EMAIL

**Default Language** English (US)

##### LEARNER REPORTS

**Default Language** English (US)

#### SESSION DETAILS

**Instructions:** Please complete the information for this session. Remember the session name which will appear on the reports. You must select the date and time of the session and designate an Administrator. Then click the SAVE button.

\* Session Name

\* Session Start Date

#### SESSION ADMINISTRATOR

\* Session Administrator

#### SESSION FACILITATORS

Add Facilitator

Add a facilitator(s) by selecting the ADD FACILITATOR button.

##### Email Address

francesca.fac@axtiontoys.com

##### Name

Francesca Facilitator (苹果 营业额)


##### Phone Number

716-687-1005

Remove

## Session Setup:

To complete setting up the session, the Administrator will need to complete the list of “Start Now” items as shown.

DASHBOARD   CLIENTS   SESSIONS   INDIVIDUALS   REPORTS   MY INFO   LOGOUT

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**Client Name** Axton Toys>>AT Sub-Client\_demo      **Session Name** SOCIAL STYLE UMBD Training (1219)      **Session Date** 23 Sep 2024      **Session Status** Pending

**Session Snapshot**      **Instructions:** Please click the START NOW button or the VIEW/EDIT button for each section listed below to setup or edit the settings for this session.      [Activate Session](#)

[Scheduled Tasks and To Dos](#)      [Copy Session](#)      [Delete Session](#)      [Return to Manage Sessions](#)

Quick Links: [Session Setup](#) | [Invitations](#) | [Reminders](#) | [Learner Reports](#) | [Session Reports](#) | [Learner Enrollment](#)

SESSION SETUP					<a href="#">View/Edit</a>
<b>Session Name</b>	<b>Session Id</b>	<b>Session Start Date</b>	<b>Facilitator</b>	<b>Administrator</b>	
SOCIAL STYLE UMBD Training	1219	23 Sep 2024	Francesca Facilitator (苹果 营业额)	Andrea Admin	
<b>Location Name</b>	<b>Location Address</b>	<b>Location Description</b>	<b>Default Email Language</b>	<b>Default Report Language</b>	
No Location	No Location	No Location	English (US)	English (US)	
<b>Product Name</b>					
SOCIAL STYLE v3>> Universal>> Multi-Rater SOCIAL STYLE Profile v3					

[Start Now](#) [Invitations](#)  
[Start Now](#) [Reminders](#)  
[Start Now](#) [Learner Reports](#)  
[Start Now](#) [Session Reports](#)  
[Start Now](#) [Learner Enrollment](#)

**Invitations:** (Learners are the participants in the training session; Raters are the individuals invited by the learners to provide feedback)

**LEARNER INVITATION DELIVERY -**

- Immediately upon Session Activation (or when a new learner is enrolled in an Active Session). This is typically the best option for Learners. Invitations will NOT be sent after the Session Start Date.
- Send on a specific date – choose a date AFTER session activation to send all Learner invitations.
- Do not send Learner invitations via MAX (they will be handled outside of the system) – the administrator would be responsible for sending the learners invitations, instructions, and the link to TRACOM Learning ([tracomlearning.com](http://tracomlearning.com))

**RATER INVITATION DELIVERY –**


- Immediately each time a Learner invites a rater. This is typically the best option for Multi-Rater sessions. Invitations will NOT be sent after the Session Start Date.
- Send on a specific date – choose a date AFTER session activation and after Learners have been invited. Raters invited after this date will receive their invitation immediately.

## LEARNER INVITATIONS:

You may choose to use the standard Subject Line and Invitation text for all invitations, and certain session details will populate automatically in the invitations.

- For learners, details such as Session Name, Session Date, TRACOM Learning link, and Session Admin name and email address are included in the invitation body and may not be changed. You may change the entire subject of the emails and/or add custom text to appear above the standard text of the email invitations.

\*\*It is often helpful to add session specifics to the custom text of the invitations, such as Report Generation Date or classroom details (see example below).



**Client Name** Axtion Toys>>AT Sub-Client\_demo      **Session Name** SOCIAL STYLE UMBD Training (1036)      **Session Date** 23 Sep 2021      **Session Status** Pending

**Session Invitations**      **Instructions:** Enter the Learner and Rater invitation schedules for this session. Please note that invitations are broken out into two distinct sections to support Learners separately from Raters. You have the option to add a custom subject line and/or custom text to each invitation.      [Save as Partially Complete](#)      [Save as Complete](#)      [Cancel](#)

Learner Email Links: [English \(US\)](#) |  
Rater Email Links: [English \(US\)](#) | [Customize Additional Email Language](#)

**LEARNER INVITATION DELIVERY**

Send immediately when Learner is enrolled  
 Send on a specific date  (at 6:30PM, -7GMT Mountain Time US/Canada)  
 Do not send Learner invitations via MAX (they will be handled outside of the system)

**RATER INVITATION DELIVERY**

Send immediately each time a Learner invites a Rater  
 Send on a specific date  (at 7:30PM, -7GMT Mountain Time US/Canada)

**CUSTOM LEARNER INVITATION TEXT – ENGLISH (US)**

**To:** <Invitee>  
**From:** TRACOM Group  
**Subject:**  Standard Subject      Invitation for <#SESSION\_NAME> on <#SESSION\_DATE>  
 Custom Subject     

**Custom Text (optional):**

Thank you for registering for the SOCIAL STYLE UMBD Training. Venue details will be sent shortly. Please complete your self-assessment and invite a minimum of 5 raters to provide feedback at your earliest convenience. Report will generate on September 18th. You will download your profile and materials for the session during the training on September 23rd.  
If you have questions regarding the training, please contact Andrea at the email below.

<#CUSTOM\_TEXT>

In preparation for your learning event on <#SESSION\_DATE>, please:

- 1) Select this link to go to TRACOM Learning: <#TL\_APP\_LINK>  
Note: This link is unique to you and should be kept private.
- 2) Upon login, follow the instructions for each item in your To-Do List

If you have any questions or have received this email in error, please contact <#SESSION\_ADMIN\_NAME> at <#SESSION\_ADMIN\_EMAIL>.  
Note: This is a system generated email. Do not reply directly to this email.

## RATER INVITATIONS:

You may choose to use the standard Subject Line and Invitation text for all invitations, and certain session details will populate automatically in the invitations.

- For Raters, the name of the Learner requesting feedback will populate in the standard subject line of the email. It is recommended to use this default subject line. You may add custom text to appear above the standard text of the rater email invitations.

When finished, click Save As Complete.

**CUSTOM RATER INVITATION TEXT – ENGLISH (US)**

**To:** <Invitee>  
**From:** TRACOM Group

**Subject:**  Standard Subject Provide feedback for <#FULL\_NAME>  
 Custom Subject

**Custom Text (optional):**

Please complete feedback for your colleague at your earliest convenience. Reports will close on September 18th.

<#CUSTOM\_TEXT>

You have been asked to provide time-sensitive, confidential feedback for <#FULL\_NAME>. Please:

- 1) Select this link to go to TRACOM Learning: <#TL\_APP\_LINK>  
Note: This link is unique to you and should be kept private.
- 2) Upon login, follow the instructions for each item in your To-Do list

If you have any questions or have received this email in error, please contact <#FULL\_NAME> at <#LEARNER\_EMAIL> or <#SESSION\_ADMIN\_NAME> at <#SESSION\_ADMIN\_EMAIL>.

Note: This is a system generated email. Do not reply directly to this email.

## Sample invitations sent from the system:

Sample Learner Invitation	Sample Rater Invitation
<p>From : TRACOM Learning <a href="mailto:admin@maxproddata1.tracom.com">admin@maxproddata1.tracom.com</a></p> <p>Standard Subject Line: <b>Invitation for &lt;#SESSION_NAME&gt; on &lt;#SESSION_DATE&gt;</b></p> <p>&lt;Optional – CUSTOM TEXT APPEARS HERE&gt;</p> <p>In preparation for your learning event on &lt;#SESSION_DATE&gt;, please:</p> <ol style="list-style-type: none"><li>1) Select this link to go to TRACOM Learning: &lt;#TL_APP_LINK&gt;</li></ol> <p>Note: This link is unique to you and should be kept private.</p> <ol style="list-style-type: none"><li>2) Upon login, follow the instructions for each item in your To-Do List</li></ol> <p>If you have any questions or have received this email in error, please contact &lt;#SESSION_ADMIN_NAME&gt; at &lt;#SESSION_ADMIN_EMAIL&gt;.</p> <p>Note: This is a system generated email. Do not reply directly to this email.</p>	<p>From : TRACOM Learning <a href="mailto:admin@maxproddata1.tracom.com">admin@maxproddata1.tracom.com</a></p> <p>Standard Subject Line: <b>Provide feedback for &lt;#FULL_NAME&gt;</b></p> <p>&lt;Optional – CUSTOM TEXT APPEARS HERE&gt;</p> <p>You have been asked to provide time-sensitive, confidential feedback for &lt;#FULL_NAME&gt;. Please:</p> <ol style="list-style-type: none"><li>1) Select this link to go to TRACOM Learning: &lt;#TL_APP_LINK&gt;</li></ol> <p>Note: This link is unique to you and should be kept private.</p> <ol style="list-style-type: none"><li>2) Upon login, follow the instructions for each item in your To-Do list</li></ol> <p>If you have any questions or have received this email in error, please contact &lt;#FULL_NAME&gt; at &lt;#LEARNER_EMAIL&gt;.</p> <p>Note: This is a system generated email. Do not reply directly to this email.</p>

## Reminders:

Reminders will be sent out to all Learners AND Raters with outstanding tasks to complete.

- **REMINDER DELIVERY:** Choose the frequency that MAX will send Reminders – from 0 to every 5 days. A selection of '0' will prevent reminders from being sent from MAX. This setting may be changed during an active session as needed. Reminders will NOT be sent after the Session Start Date.
- **REMINDER EMAIL TEXT:** You may choose to use the standard Subject Line and Reminder text for all reminders, and certain session details will populate automatically in the email. However, keep in mind that the reminder goes to BOTH learners and raters, so any customization must be generic enough to apply to both groups.

When finished, click Save As Complete.

**MAX**

Client Name: Axton Toys > AT Sub-Client\_demo      Session Name: SOCIAL STYLE UMBD Training (1036)      Session Date: 23 Sep 2021      Session Status: Pending

**Session Reminders**      Instructions: Enter the reminder schedule for this session. You can also add a custom subject line and/or custom text to each reminder. Note: This reminder is sent to both Learners and Raters. Create generic text to communicate instructions suitable for both Learner and Raters, as this is a shared reminder. Learner reminders will be sent in the language selected by the session administrator for this Learner. Rater reminders will be sent in the language selected by the Learner for the Rater.

Email Links: [English \(US\)](#) | [Customize Additional Email Language](#)

**REMINDER DELIVERY**      Remind Learners Now      Remind Raters Now

Note: Enter how often reminders are to be sent for this session. If no reminders are to be sent select the "0" option.  
Send Reminders Every  Days After Invitation is Sent

**REMINDER EMAIL TEXT - ENGLISH (US)**

To: <Invitee>  
From: TRACOM Group  
Subject:  Standard Subject      Reminder: Time-sensitive actions pending at TRACOM Learning  
 Custom Subject     

Custom Text (optional):

<#CUSTOM\_TEXT>  
You have the following actions pending. Please:  
1) Select this link to go to TRACOM Learning: <#TL\_APP\_LINK>  
Note: This link is unique to you and should be kept private.  
2) Upon login, follow the instructions for each item in your To-Do list  
<#TO\_DO>  
If you have any questions or have received this email in error, please contact <#SESSION\_ADMIN\_NAME> at <#SESSION\_ADMIN\_EMAIL>.  
Note: This is a system generated email. Do not reply directly to this email.

**Save as Partially Complete** | **Save as Complete** | **Cancel**

### Sample Reminder for Learners and Raters

From : TRACOM Learning [admin@maxproddata1.tracom.com](mailto:admin@maxproddata1.tracom.com)  
Standard Subject Line: Reminder: Time-sensitive actions pending at tracomlearning.com

<Optional - CUSTOM TEXT APPEARS HERE>

You have the following actions pending. Please:

1) Select this link to go to TRACOM Learning: <#TL\_APP\_LINK>  
Note: This link is unique to you and should be kept private.

2) Upon login, follow the instructions for each item in your To-Do list  
<#TO\_DO>

If you have any questions or have received this email in error, please contact <#SESSION\_ADMIN\_NAME> at <#SESSION\_ADMIN\_EMAIL>.  
Note: This is a system generated email. Do not reply directly to this email.



## **Learner Reports:**

### REPORT NORM:

The report norm for the session will default to the product setting for your organization and should most likely remain this default. To learn more about TRACOM's international norms, go to [tracom.com/about-us/global-capability/international-norms](http://tracom.com/about-us/global-capability/international-norms)

REPORT AVAILABLE TO LEARNERS: Learners will be able to download and view their profile reports at [tracomlearning.com](http://tracomlearning.com) according to these settings. The report will be available through TRACOM Learning on the Reports tab.

### 3 availability options:

- Immediately upon generation – Reports will be available for Learners to download at TRACOM Learning as soon as the report generates.
- The day after the session start date – Generated reports will be available for Learners to download at TRACOM Learning one day after the Session Start Date.
- On a specific date – Generated reports will be available for Learners to download at TRACOM Learning at midnight Mountain Time on this date.

(OPTIONAL) MATERIALS AVAILABLE TO LEARNERS: If your organization has rights to electronically download participant materials, this section will be visible on the Learner Reports screen. If enabled, you will have the option to check materials you want to provide to Learners through [tracomlearning.com](http://tracomlearning.com). Check the box beside the materials that will be used in the training. If you'd like to view the materials, click the view button to the right of the material name.

### 2 availability options:

- Match Learner Report Availability – the materials will be available to download at the same time the profile report is made available to the Learner, per above setting.
- On a specific date – you may choose which day the materials are available to the Learners.

\*\*The materials will be available through TRACOM Learning on the Reports tab.



Client Name Axltion Toys>>AT Sub-Client\_demo

Session Name SOCIAL STYLE UMBD Training (1036)

Session Date 23 Sep 2021

Session Status Pending

### Learner Reports

**Instructions:** Enter Learner Report information for this session. If at this time you have some, but not all, of the information required to set up reports, you may enter it and click the SAVE AS PARTIALLY COMPLETE button. This will allow you to complete the setup at a later date.

[Save as Partially Complete](#) [Save as Complete](#) [Cancel](#)

#### REPORT NORM

Norm Global

#### LEARNER PROFILE REPORT AND SOCIAL STYLE PASSPORT AVAILABLE TO LEARNERS

##### Learner Profile Report and SOCIAL STYLE Passport Availability

- Immediately upon generation
- The day after the Session Start Date
- On a specific date:  (example: 31 DEC 2010)

#### MATERIALS AVAILABLE TO LEARNERS

##### Materials Available to Learners

- Match Learner Report Availability
- On a Specific Date:  (example: 31 DEC 2010)

##### Universal Materials Available to Learners

- Improving Personal Effectiveness With Versatility Concepts Guide [view](#)
- Understanding and Managing Behavioral Differences Participant Package [view](#)
- Achieving Higher Versatility Resource Guide [view](#)

##### Managerial Materials Available to Learners

- Improving Managerial Effectiveness With Versatility Concepts Guide [view](#)

##### Sales Materials Available to Learners

- Improving Sales Effectiveness With Versatility Concepts Guide [view](#)

## REPORT GENERATION & NOTIFICATION

### 3 Report Generation Periods:

- **Initial Report Generation** – The default initial report generation date is 5 days before the Session Start Date, but may be changed at setup or during an active session. This setting may be changed only BEFORE reports generate. This initial period allows for the most data collection and we recommend at least 3 weeks lead time from session activation to Session Start Date. When the Report Date is reached, profiles will generate at 6 pm Mountain Time for all Learners with Sufficient Data (self-assessment and at least 3 completed rater surveys). Click boxes to notify Admin, Learner or Facilitator when reports generate.
- **Additional Reports: Pre-Session** – This is the time period AFTER the Initial Report Generation Date but BEFORE the Session Start Date. All reports during this time period will generate immediately when a learner receives Sufficient Data (self-assessment and 3 completed rater surveys). You may select to notify the Learner, Admin or Facilitator when reports generate during this period as well.
- **Late Reports: Post-Session** – This is the final period to generate profile reports for any Learner without sufficient data. This period lasts for 30 days AFTER the Session Start Date and will generate reports immediately when a Learner receives Sufficient Data (self-assessment and 3 completed rater surveys). You may select to notify the Learner, Admin or Facilitator when reports generate during this period as well.

REPORT GENERATION & NOTIFICATION			
	Initial Report Generation	Additional Reports: Pre-Session	Late Reports: Post-Session
	Activation Date -> Report Date	Report Date + 1 -> Start Date - 1	Start Date -> Start Date + 30
	Unknown - 18 Sep 2024	19 Sep 2024 - 22 Sep 2024	23 Sep 2024 - 23 Oct 2024
<b>Who will generate reports?</b>	<input type="text" value="System Will Auto Generate"/>	<input type="text" value="System Will Auto Generate"/>	<input type="text" value="System Will Auto Generate"/>
<b>When should the reports be generated?</b>	<input type="text" value="X Days Before Session Start Date (Enter Below)"/>	<input type="text" value="Immediately"/>	<input type="text" value="Immediately"/>
	<input type="text" value="5"/>		
<b>Who should be notified when reports are generated?</b>	<input checked="" type="checkbox"/> Admin <input type="checkbox"/> Learner <input type="checkbox"/> Facilitator Francesca Facilitator (苹果 营业额)	<input checked="" type="checkbox"/> Admin <input type="checkbox"/> Learner <input type="checkbox"/> Facilitator Francesca Facilitator (苹果 营业额)	<input checked="" type="checkbox"/> Admin <input type="checkbox"/> Learner <input type="checkbox"/> Facilitator Francesca Facilitator (苹果 营业额)

\* Required Field

When finished, click Save As Complete at the top of the screen.

## Session Reports:

SESSION STATUS REPORTS – The system will send periodic updates to the administrator, facilitators, or any other individual specified in this section. These reports show the progress of each learner in the session.

- Check the box next to the individual you want to receive status reports.
- Select the frequency to send Session Status Reports. This can be changed before AND after session activation.
- During the last week before the Session Start Date, you may increase the frequency.

When finished, click Save As Complete.

**MAX**

Client Name: Axtion Toys>>AT Sub-Client\_demo      Session Name: SOCIAL STYLE UMBD Training (1036)      Session Date: 23 Sep 2021      Session Status: Pending

**Session Reports**      Instructions: Enter the Session Status report information for this session.

Save as Partially Complete    Save as Complete    Cancel

### SESSION STATUS REPORTS

Who would you like to receive Session Status Reports via Email?

	* Email Address	* First Name	* Last Name	Localized First Name	Localized Last Name	Phone Number	
<input checked="" type="checkbox"/>	Session Admin	andrea.admin@axtiontoys.com	Andrea	Admin		716-687-1001	
<input checked="" type="checkbox"/>	Facilitator	francesca.fac@axtiontoys.com	Francesca	Facilitator	苹果	营业额	716-687-1005
<input type="checkbox"/>	Client Contact	a@a.com	a				
<input type="checkbox"/>	Other	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

How often do you wish the selected contacts above receive email updates of the Session Status Report?

Deliver report every  days after session is activated

During final week before the session, send Session Status Report according to this schedule:

Same as above     Daily     Every other day

\* Required Field

## Learner Enrollment:

In this final section, you'll add the participants' names and email addresses into the system.

**AVAILABLE QUANTITY** – You will need to have 1 profile for each learner in your session. If you need to purchase more profiles, please contact your TRACOM Sales Representative.

**LEARNERS ENROLLED:** Use one of these 2 options to enroll your learners – either Manual Entry or Excel Upload.

**MAX**

Client Name Axltion Toys>>AT Sub-Client\_demo      Session Name SOCIAL STYLE UMBD Training (1036)      Session Date 23 Sep 2021      Session Status Pending

**Learner Enrollment**      **Instructions:** Select one of the ADD buttons to add a new Learner(s) to the session. To move or remove Learner(s) from the session, select the field in front of the Learner(s) name and click the REMOVE or MOVE button. Click on a first name hyperlink to view the details for that Learner.      [Return to Session Snapshot](#)

**AVAILABLE QUANTITY**  
100 (SOCIAL STYLE v3>> Universal>> Multi-Rater SOCIAL STYLE Profile v3)

**LEARNERS ENROLLED**      [Remove Selected](#)      [Move Selected](#)      [Add via Manual Entry](#)      [Add via Excel Upload](#)

Select All      Total Selected: 0

Select	First Name	Last Name	Email Address	Report Norm	Email Language / Report Language	Data Status	Report Status
No data to display							

Click Add via Manual Entry to add each learner individually.

- Enter the email address and name of the learner, then click Add Learner Now.
- If the learner's email address is already in the MAX system, you may select it from the dropdown list that appears and the First Name and Last Name will populate automatically.
- Email Language, Report Language, and Report Norm will default to the session settings, but may be changed for each individual during enrollment if needed.

**MAX**

Client Name Axltion Toys>>AT Sub-Client\_demo      Session Name SOCIAL STYLE UMBD Training (1036)      Session Date 23 Sep 2021      Session Status Pending

**Add Learners**      **Instructions:** When entering the Learner information, you must first input the email address. Entry of localized name fields is optional, and intended for non-Western/non-Latin alphabet characters. Email language, report language, and profile norm are required. Learner reminders default to Yes, if you wish not to use them, select no. Select the ADD LEARNER NOW button. Repeat for each Learner.      [Return to Learner Enrollment](#)

**NEW LEARNER ENTRY**

* Email Address learner12@axlontoy.com	* First Name Chu	* Last Name Yen	Localized First Name	Localized Last Name
* Email Language English (US)	* Report Language English (US)	* Report Norm Global	Learner Reminders Enabled Yes	

0 New Learners Added      0 Total Learners

**NEW LEARNERS ADDED**

Name	Email Language	Report Language	Report Norm	Report Status
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Click Add via Excel Upload to upload multiple learners at the same time.

**MAX**

Client Name: Axtion Toys>>AT Sub-Client\_demo      Session Name: SOCIAL STYLE UMBD Training (1036)      Session Date: 23 Sep 2021      Session Status: Pending

**Learner Enrollment**      **Instructions:** Select one of the ADD buttons to add a new Learner(s) to the session. To move or remove Learner(s) from the session, select the field in front of the Learner(s) name and click the REMOVE or MOVE button. Click on a first name hyperlink to view the details for that Learner.      [Return to Session Snapshot](#)

**AVAILABLE QUANTITY**  
100 (SOCIAL STYLE v3>> Universal>> Multi-Rater SOCIAL STYLE Profile v3)

**LEARNERS ENROLLED**      [Remove Selected](#)      [Move Selected](#)      [Add via Manual Entry](#)      [Add via Excel Upload](#)

Select All      Total Selected: 0

Select	First Name	Last Name	Email Address	Report Norm	Email Language / Report Language	Data Status	Report Status
No data to display							

LEARNER ENROLLMENT Form		
Do not edit or remove the columns or rows in this spreadsheet.		
Complete Columns A, B, and C, beginning on row 4. (* Required Field)		
Email Address*	First Name*	Last Name*
<a href="mailto:learner30@axtiontoys.com">learner30@axtiontoys.com</a>	Sidney	Jones
<a href="mailto:learner35@axtiontoys.com">learner35@axtiontoys.com</a>	Aidan	Rowe

Learner enrollment\_02 SEP | Excel 97-2003 Workbook (\*.xls) | Save

- Use the [Learner Enrollment Form](#) provided by TRACOM.
- Populate the Excel file with all Learner data and save the file in “.xls” format. Note that only Email Address, First Name and Last name are required.
- Browse your computer to choose the Excel file, then click Upload.
- Review the Learner List, click Save.
- Learners will be enrolled in the Session.

**Learner Enrollment - Excel Upload**

Instructions: Follow the steps stated below to add all of the Learners for this session from an Excel spreadsheet.

**Upload** Cancel

en_GB	English (International)	el	Greek	ro	Romanian	sv	Swedish
en_US	English (US)	it	Italian	ru	Russian	th	Thai
fr_CA	French (Canadian)	ja	Japanese	es_ES	Spanish (European)	tr	Turkish

Column G: Norm Id (optional)  
Choose from the regions listed below. If a Norm Id is not specified, the system will use the session default norm (Global).

173	Africa (Eastern)	182	Canada (French Speaking)	178	Ireland	192	Russia
172	Africa (Southern)	176	China	200	Italy	209	Serbia
174	Africa (Western)	215	Columbia	216	Japan	208	Singapore
162	America (Central) & Mexico	186	Denmark	213	Malaysia	206	South Africa
160	America (North)	163	Europe (Eastern)	212	Mexico	193	South Korea
161	America (South)	164	Europe (Northern)	171	Middle East	205	Spain
201	Argentina	165	Europe (Southern)	199	Netherlands	204	Sweden
168	Asia (East)	166	Europe (Western)	198	New Zealand	203	Switzerland
170	Asia (South Central)	187	Finland	197	Norway	202	Thailand
169	Asia (Southeast)	188	France	167	Oceania	179	United Kingdom
175	Australia	177	Germany	196	Pakistan	180	United States
183	Austria	189	Greece	211	Philippines	207	Vietnam
184	Belgium	190	Hong Kong	195	Poland	159	Global
185	Brazil	191	India	194	Portugal		
181	Canada (English Speaking)	214	Indonesia	210	Romania		

Column H: Report Language (optional)  
The language to be used when generating the learner report. Choose from the languages listed below. If a report language is not specified, the system will use the session default report language (en\_US).

en_US	English (US)	en_GB	English (International)	fr	French (European)
de	German	es_ES	Spanish (European)	zh	Chinese (Simplified)

- Step 2** Save your Excel file. If you are using Excel 2007 or 2010 you must save the file in .XLS format before uploading. The newer .XLSX format is not currently supported.
- Step 3** Locate the Excel file by selecting the BROWSE button: **Choose File** No file chosen
- Step 4** Select the UPLOAD button to import your Learners.

**Verify Learner Upload**

Instructions: Verify Learner information for this session. Select the SAVE button to continue, or CANCEL button to fix any errors in your Excel file.

Save Cancel

**NEW LEARNERS**

Email Address	Name	Email Language	Report Language	Report Norm
learner30@axtiontoys.com	Sidney Jones	English (US)	English (US)	Global
learner35@axtiontoys.com	Aidan Rowe	English (US)	English (US)	Global

**REJECTED LEARNERS (FROM EXCEL FILE)**

Email Address	Name	Email Language	Report Language	Report Norm	Rejection Reason
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## Learner Enrollment Screen:

- Shows learner names and email addresses.
- Shows Norm, Email Language, Data Status (Not Started, Started, Sufficient Data, Generated) and Report Status (Sample, Generated, Downloaded) for each Learner enrolled.
- Learners may be added, removed, or moved from this screen.

When finished, click Return to Session Snapshot.

**MAX**

Client Name: Axtion Toys>>AT Sub-Client\_demo      Session Name: SOCIAL STYLE UMBD Training (1036)      Session Date: 23 Sep 2021      Session Status: Pending

**Learner Enrollment**      **Instructions:** Select one of the ADD buttons to add a new Learner(s) to the session. To move or remove Learner(s) from the session, select the field in front of the Learner(s) name and click the REMOVE or MOVE button. Click on a first name hyperlink to view the details for that Learner.      [Return to Session Snapshot](#)

**AVAILABLE QUANTITY**  
97 (SOCIAL STYLE v3>> Universal>> Multi-Rater SOCIAL STYLE Profile v3)

**LEARNERS ENROLLED**      [Remove Selected](#)      [Move Selected](#)      [Add via Manual Entry](#)      [Add via Excel Upload](#)

Select All      Total Selected: 0

Select	First Name	Last Name	Email Address	Report Norm	Email Language / Report Language	Data Status	Report Status
<input type="checkbox"/>	<a href="#">Sidnev</a>	Jones	learner30@axtiontoys.com	Global	English (US) English (US)	Not Started	Sample
<input type="checkbox"/>	<a href="#">Aidan</a>	Rowe	learner35@axtiontoys.com	Global	English (US) English (US)	Not Started	Sample
<input type="checkbox"/>	<a href="#">Chu</a>	Yen	learner12@axtiontoys.com	Global	English (US) English (US)	Not Started	Sample



## Activate Session:

Return to the Session Snapshot to review the session Settings. If all looks complete and accurate, click Activate Session to start the session workflows.

**MAX** DASHBOARD CLIENTS SESSIONS INDIVIDUALS REPORTS MY INFO LOGOUT

Client Name: Axtion Toys>>AT Sub-Client\_demo      Session Name: SOCIAL STYLE UMBD Training (1219)      Session Date: 23 Sep 2024      Session Status: Pending

**Session Snapshot**      Instructions: Please click the START NOW button or the VIEW/EDIT button for each section listed below to setup or edit the settings for this session.      **Activate Session**

Scheduled Tasks and To Dos      Copy Session      Delete Session      Return to Manage Sessions

Quick Links: [Session Setup](#) | [Invitations](#) | [Reminders](#) | [Learner Reports](#) | [Session Reports](#) | [Learner Enrollment](#)

**SESSION SETUP** View/Edit

Session Name	Session Id	Session Start Date	Facilitator	Administrator
SOCIAL STYLE UMBD Training	1219	23 Sep 2024	Francesca Facilitator (苹果 营业额)	Andrea Admin
Location Name	Location Address	Location Description	Default Email Language	Default Report Language
No Location	No Location	No Location	English (US)	English (US)
Product Name	SOCIAL STYLE v3>> Universal>> Multi-Rater SOCIAL STYLE Profile v3			

**LEARNER ENROLLMENT** View/Edit

Learners Enrolled	Not Started	Generated	Existing
3	3	0	0

**INVITATIONS** View/Edit

Send Learner Invitations	Learner Custom Subject	Learner Custom Text	Send Rater Invitations	Rater Custom Subject	Rater Custom Text
Immediate	No	No	Immediate	No	No

**REMINDERS** View/Edit

Reminder Frequency	Reminder Custom Subject	Reminder Custom Text
3 Days After Invitation is Sent	No	No

**LEARNER REPORTS** Go To Reports View/Edit

Cultural Norm	How to Send	When to Send	Pre-Session Late Reports	Post-Session Late Reports
Global	System Will Auto Generate	18 Sep 2024	System Will Auto Generate	System Will Auto Generate

**SESSION REPORTS** Go To Reports View/Edit

Who Receives Report	Report Delivery	Final Week Report Delivery
Facilitator(s), Session Admin	Every 7 Days After Session Activation	Every other day

**Please Confirm** ✕

Activating this Session will make certain fields no longer editable and will start automated workflows for this session.

**OK**      Cancel

Your Session Setup is now complete and the Session Status is Active.

The screenshot shows the MAX system interface. At the top, there is a navigation bar with the MAX logo and menu items: DASHBOARD, CLIENTS, SESSIONS, INDIVIDUALS, REPORTS, MY INFO, and LOGOUT. Below the navigation bar, the session details are displayed: Client Name: Axtion Toys>>AT Sub-Client\_demo, Session Name: SOCIAL STYLE UMBD Training (1219), Session Date: 23 Sep 2024, and Session Status: Active. An arrow points to the Session Status field. Below the session details is the Session Snapshot section, which includes instructions and buttons for Copy Session, Cancel or Reschedule Session, and Return to Manage Sessions. The Snapshot section is divided into several tabs: Scheduled Tasks and To Dos, and a View/Edit button. Below the Snapshot section are Quick Links for Session Setup, Invitations, Reminders, Learner Reports, Session Reports, and Learner Enrollment. The main content area is titled SESSION SETUP and contains a table with the following data:

Session Name	Session Id	Session Start Date	Facilitator	Administrator
SOCIAL STYLE UMBD Training	1219	23 Sep 2024	Francesca Facilitator (苹果 营业额)	Andrea Admin
Location Name	Location Address	Location Description	Default Email Language	Default Report Language
No Location	No Location	No Location	English (US)	English (US)
Product Name	SOCIAL STYLE v3>> Universal>> Multi-Rater SOCIAL STYLE Profile v3			

## ADDITIONAL INFORMATION TO ASSIST AFTER SESSION ACTIVATION

### Scheduled Tasks and To Dos:

After the Session is activated, you may view the Scheduled System Tasks and Completed System Tasks for the session. This includes Invitations Sent, Reminders Sent and scheduled, Session Status Reports Sent and schedule, and Report Generation timing.

To view this list, click the Scheduled Tasks and To Dos button on the Session Snapshot:

The screenshot shows the MAX system interface. At the top, there is a navigation bar with the MAX logo and menu items: DASHBOARD, CLIENTS, SESSIONS, INDIVIDUALS, REPORTS, MY INFO, and LOGOUT. Below the navigation bar, the session details are displayed: Client Name: Axtion Toys>>AT Sub-Client\_demo, Session Name: SOCIAL STYLE UMBD Training (1036), Session Date: 23 Sep 2021, and Session Status: Active. Below the session details is the Session Snapshot section, which includes instructions and buttons for Copy Session, Cancel or Reschedule Session, and Return to Manage Sessions. The Snapshot section is divided into several tabs: Scheduled Tasks and To Dos, and a View/Edit button. An arrow points to the Scheduled Tasks and To Dos button.

View all Scheduled and Completed Tasks for the session. If you update any settings which generate scheduled tasks, this list will be updated automatically.

MAX		Client Name	Session Name	Session Date	Session Status
		Action Toys >> AT Sub-Client_demo	SOCIAL STYLE UMBD Training (1036)	23 Sep 2021	Active
<b>Scheduled Tasks and To Dos</b>					<a href="#">Return to Session Snapshot</a>
<b>Instructions:</b> Select the Complete box to indicate a task is now complete. Select a Description link to go to the screen associated with that To Do item.					
ADMIN TO DO'S					
Complete	Description	Date Due	Status		
<input checked="" type="checkbox"/>	<a href="#">Complete session setup</a>	29 Jul 2021	Completed		
<input checked="" type="checkbox"/>	<a href="#">Activate session for 23 Sep 2021</a>	23 Sep 2021	Completed		
SCHEDULED SYSTEM TASKS					
Description	Run Date	Status			
Reminders Sent	19 Aug 2021	Scheduled			
Session Status Report Sent	19 Aug 2021	Scheduled			
Reminders Sent	22 Aug 2021	Scheduled			
Reminders Sent	25 Aug 2021	Scheduled			
Session Status Report Sent	26 Aug 2021	Scheduled			
Reminders Sent	28 Aug 2021	Scheduled			
Reminders Sent	31 Aug 2021	Scheduled			
Session Status Report Sent	02 Sep 2021	Scheduled			
Reminders Sent	03 Sep 2021	Scheduled			
Reminders Sent	06 Sep 2021	Scheduled			
Reminders Sent	09 Sep 2021	Scheduled			
Session Status Report Sent	09 Sep 2021	Scheduled			
Reminders Sent	12 Sep 2021	Scheduled			
Reminders Sent	15 Sep 2021	Scheduled			
Session Status Report Sent Final Week	16 Sep 2021	Scheduled			
System Generate Initial Reports	18 Sep 2021	Scheduled			
Reminders Sent	18 Sep 2021	Scheduled			
Session Status Report Sent Final Week	18 Sep 2021	Scheduled			
Session Status Report Sent Final Week	20 Sep 2021	Scheduled			
Reminders Sent	21 Sep 2021	Scheduled			
Session Status Report Sent Final Week	22 Sep 2021	Scheduled			
COMPLETED SYSTEM TASKS					
Description	Run Date	Count			
Learner Invitations Sent	29 Jul 2021	3			

## Session Reports:

Once the session is set up and activated, you may access the Session Reports at any time to check Learner completion status.

Log in to MAX, and go to Sessions >> Manage Session. Then select the session, using the filtering mechanisms at the top of the screen if needed. From the Session Snapshot, click the Go to Reports button from either the Learner Reports or Session Reports sections:

**MAX** DASHBOARD CLIENTS SESSIONS INDIVIDUALS REPORTS MY INFO LOGOUT

**Client Name** Axion Toys>>AT Sub-Client\_demo      **Session Name** SOCIAL STYLE UMBD Training (1219)      **Session Date** 23 Sep 2024      **Session Status** Active

**Session Snapshot**      **Instructions:** Please click the START NOW button or the VIEW/EDIT button for each section listed below to setup or edit the settings for this session.

Scheduled Tasks and To Dos      Copy Session      Cancel or Reschedule Session      Return to Manage Sessions

Quick Links: [Session Setup](#) | [Invitations](#) | [Reminders](#) | [Learner Reports](#) | [Session Reports](#) | [Learner Enrollment](#)

**SESSION SETUP** View/Edit

Session Name	Session Id	Session Start Date	Facilitator	Administrator
SOCIAL STYLE UMBD Training	1219	23 Sep 2024	Francesca Facilitator (苹果 营业额)	Andrea Admin
Location Name	Location Address	Location Description	Default Email Language	Default Report Language
No Location	No Location	No Location	English (US)	English (US)
Product Name	SOCIAL STYLE v3>> Universal>> Multi-Rater SOCIAL STYLE Profile v3			

**LEARNER ENROLLMENT** View/Edit

Learners Enrolled	Not Started	Started	Sufficient Data	Generated	Existing
3	3	0	0	0	0

**INVITATIONS** View/Edit

Send Learner Invitations	Learner Custom Subject	Learner Custom Text	Send Rater Invitations	Rater Custom Subject	Rater Custom Text
Immediate	No	No	Immediate	No	No

**REMINDERS** View/Edit

Reminder Frequency	Reminder Custom Subject	Reminder Custom Text
3 Days After Invitation is Sent	No	No

**LEARNER REPORTS** Go To Reports View/Edit

Cultural Norm	How to Send	When to Send	Pre-Session Late Reports	Post-Session Late Reports
Global	System Will Auto Generate	18 Sep 2024	System Will Auto Generate	System Will Auto Generate

**SESSION REPORTS** Go To Reports View/Edit

Who Receives Report	Report Delivery	Final Week Report Delivery
Facilitator(s), Session Admin	Every 7 Days After Session Activation	Every other day

Click the button for the report which you would like to access:

**MAX**

Client Name Axton Toys >> AT Sub-Client\_demo      Session Name SOCIAL STYLE UMBD Training (1036)      Session Date 23 Sep 2021      Session Status Active

**Session Reports** Return

**SESSION LEARNER SUMMARY**

Learners Enrolled	Not Started	Started	Sufficient Data	Generated	Existing
3	3	0	0	0	0

**DOWNLOAD REPORTS**

**Instructions:** Select the check boxes for the Learner Reports you wish to download. If a report you wish to download is LOCKED, first confirm with the Learner that they have recently reset their security questions and verify that the locked Learner Report belongs to this individual. You may then unlock the Learner Report via the Individual Reports screen at tracommax.com and return to the Session Reports screen to download the report.

Select All    Total Selected: 0

Select	First Name	Last Name	Report Status	PDF File Downloaded?	Generation Date	Report Languages
<input type="checkbox"/>	Sidney	Jones	Sample	No		English (US)
<input type="checkbox"/>	Aidan	Rowe	Sample	No		English (US)
<input type="checkbox"/>	Chu	Yen	Sample	No		English (US)

**Learner Report Options**

- Both SOCIAL STYLE and Versatility Reports
- Only SOCIAL STYLE Reports
- Only Versatility Reports

**Printing Options**

- Single-Sided Printing
- Double-sided Printing (blank pages will be inserted as needed)

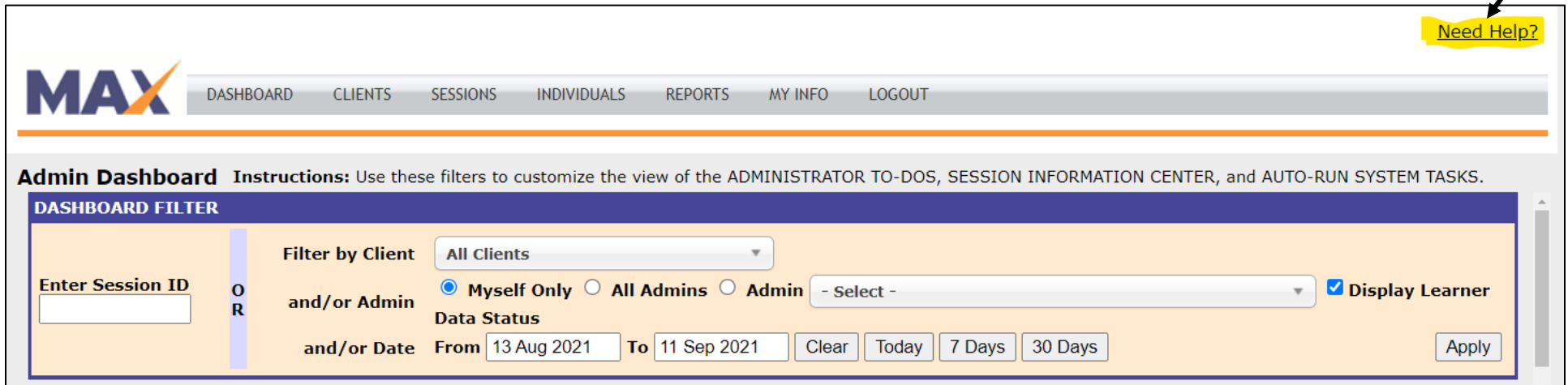
Download Learner Report(s) (PDF)   
 Download Composite Report (PDF)   
 Download Status Report (PDF)   
 Download Raters Enrolled Report (Excel)   
 Download Learner Status (Excel)

Materials Available to Learners Understanding and Managing Behavioral Differences Participant Package Download

\*\*Please note : Composite Reports will not contain learner data until after the reports have generated.

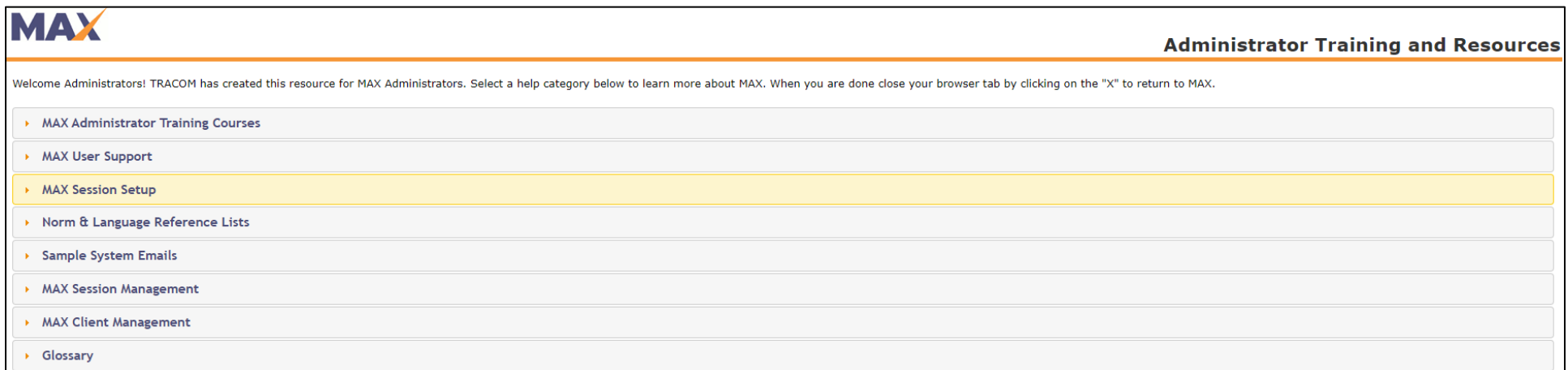
## MAX Help Portal:

TRACOM has created a resource for MAX Administrators that may be accessed at any time by clicking the Need Help? link on any MAX screen:



The screenshot shows the MAX Admin Dashboard interface. At the top right, a yellow button labeled "Need Help?" is highlighted with a yellow box and an arrow pointing to it. The dashboard includes a navigation menu with links for DASHBOARD, CLIENTS, SESSIONS, INDIVIDUALS, REPORTS, MY INFO, and LOGOUT. Below the navigation menu, there is a section titled "Admin Dashboard" with instructions: "Use these filters to customize the view of the ADMINISTRATOR TO-DOS, SESSION INFORMATION CENTER, and AUTO-RUN SYSTEM TASKS." A "DASHBOARD FILTER" section is visible, containing a search box for "Enter Session ID", a "Filter by Client" dropdown menu set to "All Clients", radio buttons for "Myself Only" (selected), "All Admins", and "Admin", a dropdown menu for "and/or Admin" set to "- Select -", a checked checkbox for "Display Learner", a "Data Status" section with "From" and "To" date pickers (13 Aug 2021 and 11 Sep 2021), and buttons for "Clear", "Today", "7 Days", "30 Days", and "Apply".

Here you will find access to Training videos, User Support guidance, assistance for Session Setup and Management, System Email samples, Client Management guidance, and a MAX Glossary.



The screenshot shows the "Administrator Training and Resources" page. The page features a welcome message: "Welcome Administrators! TRACOM has created this resource for MAX Administrators. Select a help category below to learn more about MAX. When you are done close your browser tab by clicking on the 'X' to return to MAX." Below the message is a list of help categories, each with a right-pointing arrow icon: "MAX Administrator Training Courses", "MAX User Support", "MAX Session Setup" (highlighted in yellow), "Norm & Language Reference Lists", "Sample System Emails", "MAX Session Management", "MAX Client Management", and "Glossary".

For further support or information, please use the MAX Help portal or contact [support@tracom.com](mailto:support@tracom.com)