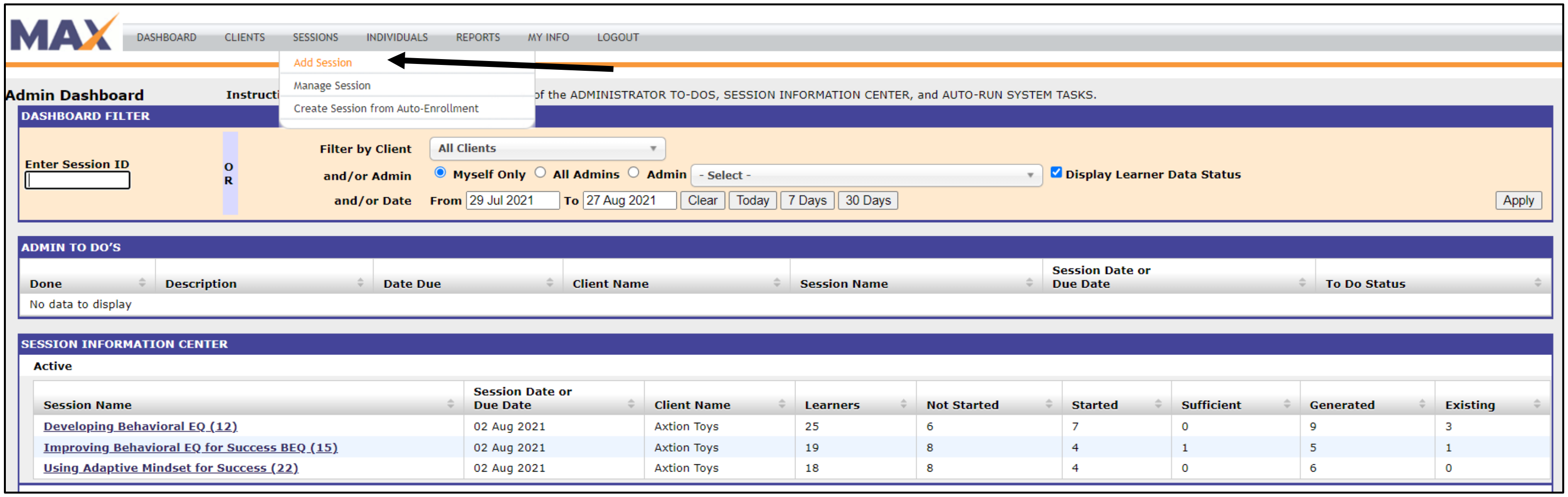
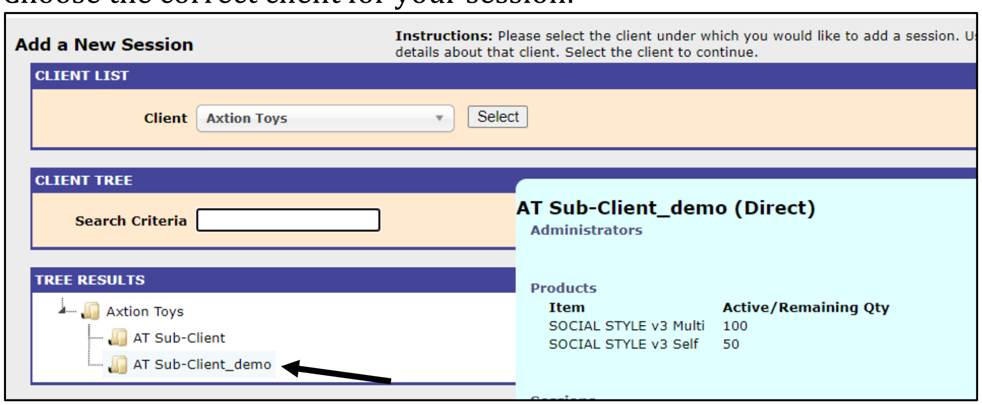
SESSION SETUP INSTRUCTIONS FOR MULTI-RATER PROFILES

Log in to tracommax.com

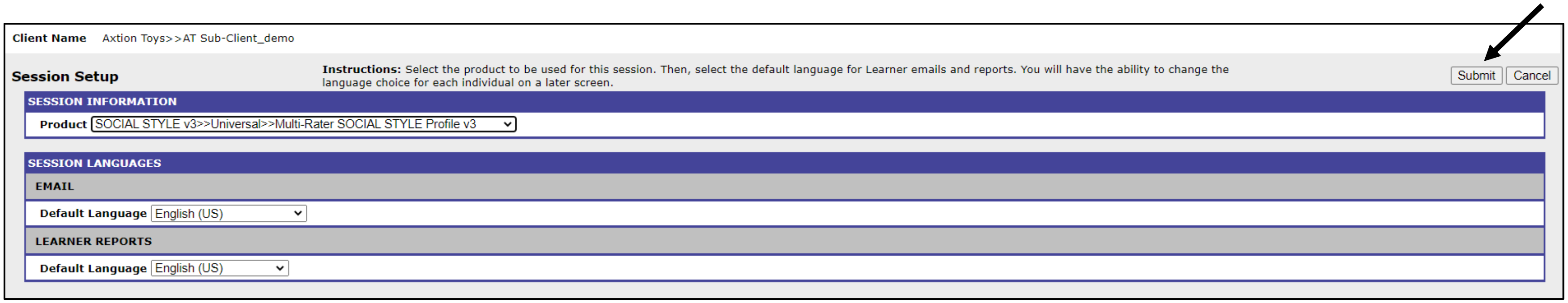
To add a new Session, go to the Sessions tab on the toolbar and select Add Session:



Choose the correct client for your session:



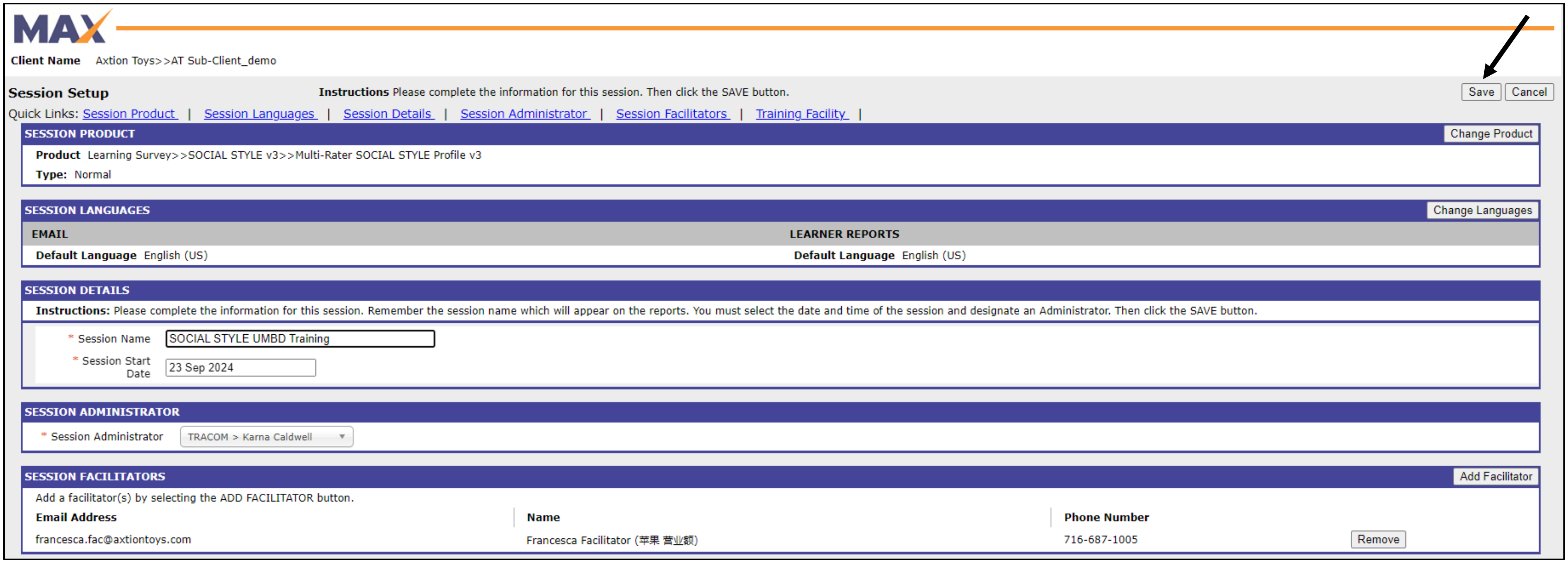
Choose the correct product for your session, then click Submit.



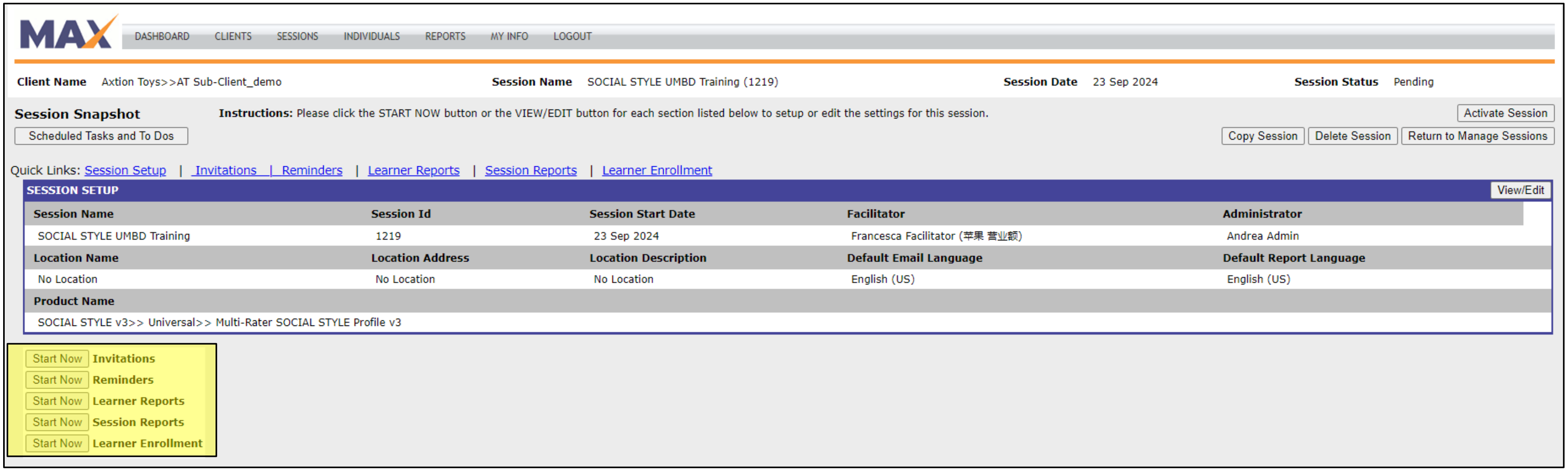
Session Details:

- 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.


MAX
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
LEARNER REPORTS
Default Language English (US)
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
SOCIAL STYLE UMBD Training
* Session Start Date
23 Sep 2024
SESSION ADMINISTRATOR
* Session Administrator
TRACOM > Karna Caldwell
SESSION FACILITATORS
Add Facilitator
Add a facilitator(s) by selecting the ADD FACILITATOR button.
Email Address
Name
Phone Number
francesca.fac@axtiontoys.com
Francesca Facilitator (苹果 营业额)
716-687-1005
Remove

<u>Session Setup</u>:
To complete setting up the session, the Administrator will need to complete the list of "Start Now" items as shown.



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)

RATER INVITATION DELIVERY –

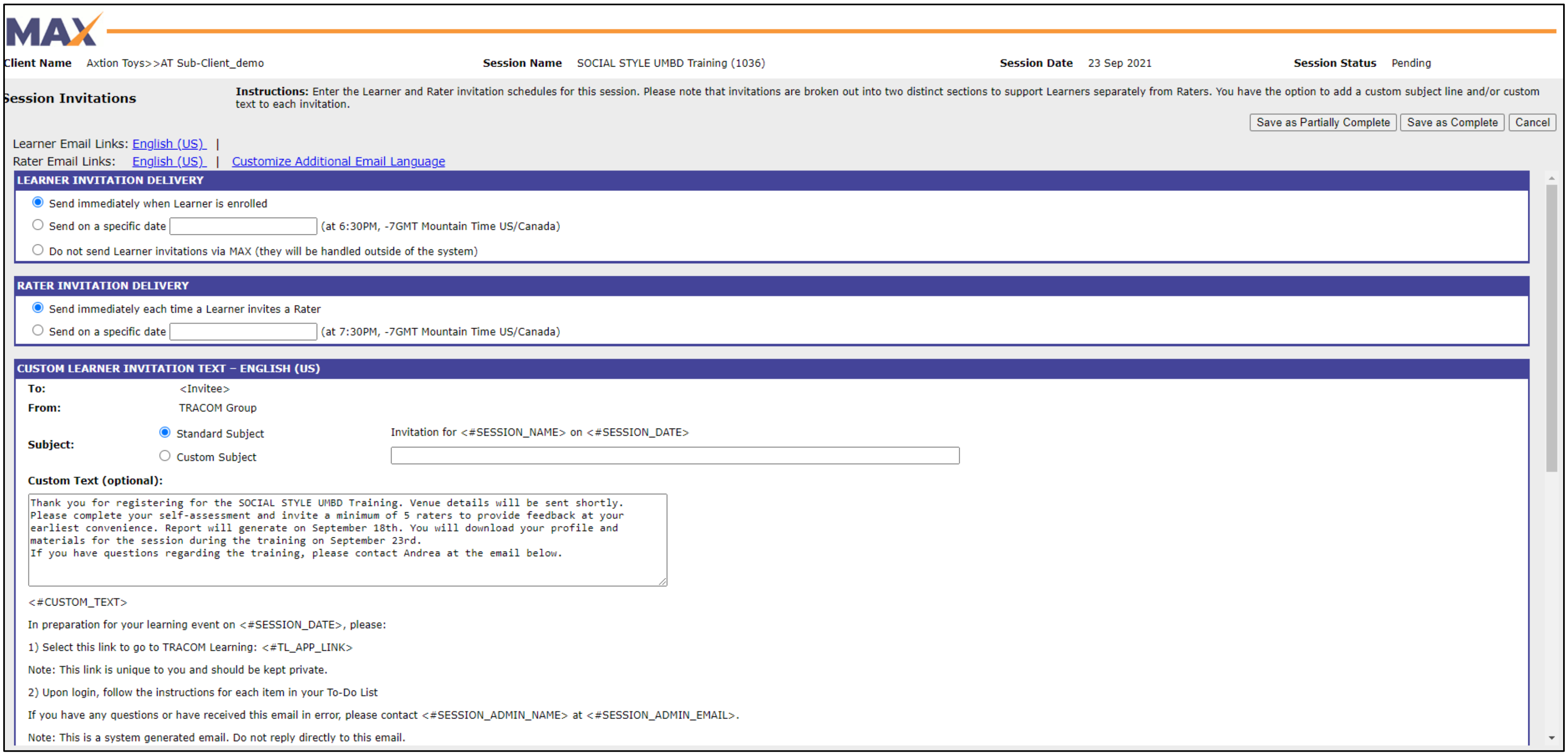
- Immediately each time a Learner invites a rater. This is typically the best option for Multi-Rater sessions. Invitations will NOT be sent after the Session Start Date.
- Send on a specific date – choose a date AFTER session activation and after Learners have been invited. Raters invited after this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

From : TRACOM Learning admin@maxproddata1.tracom.com

Standard Subject Line: **Invitation for <#SESSION_NAME> on <#SESSION_DATE>**

<Optional – CUSTOM TEXT APPEARS HERE>

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.

Sample Rater Invitation

From : TRACOM Learning admin@maxproddata1.tracom.com

Standard Subject Line: **Provide feedback for <#FULL_NAME>**

<Optional – CUSTOM TEXT APPEARS HERE>

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>.

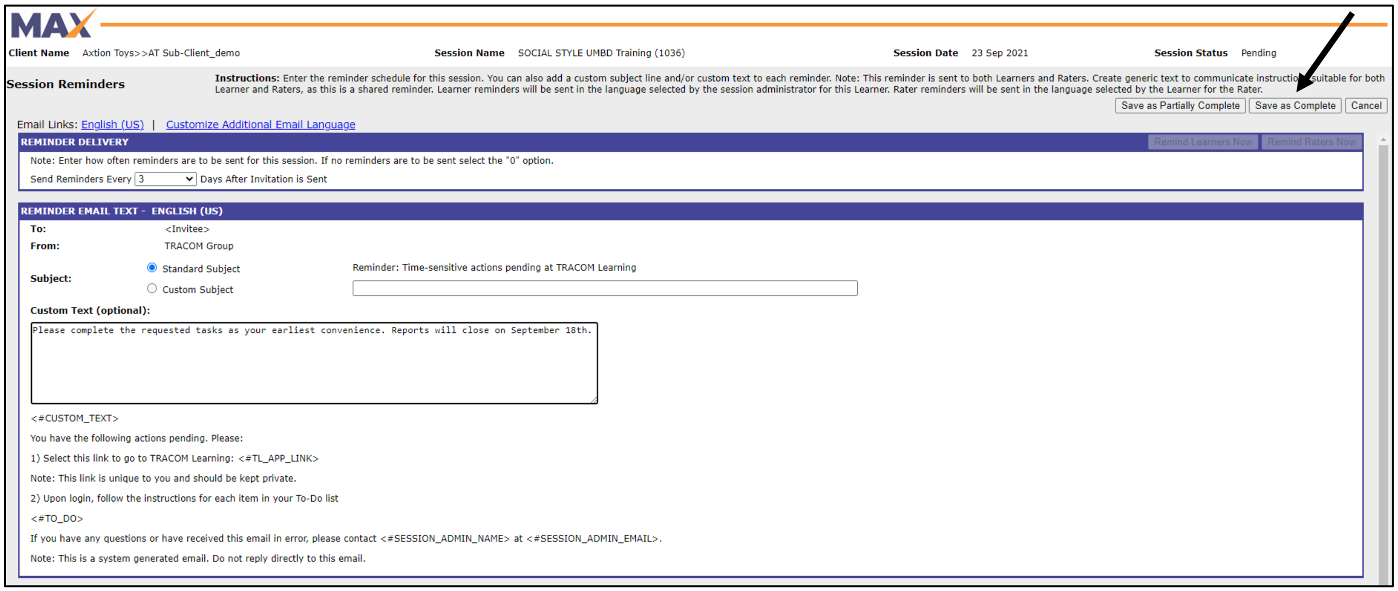
Note: This is a system generated email. Do not reply directly to this email.

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.



Sample Reminder for Learners and Raters

From : TRACOM Learning 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

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

3 availability options:

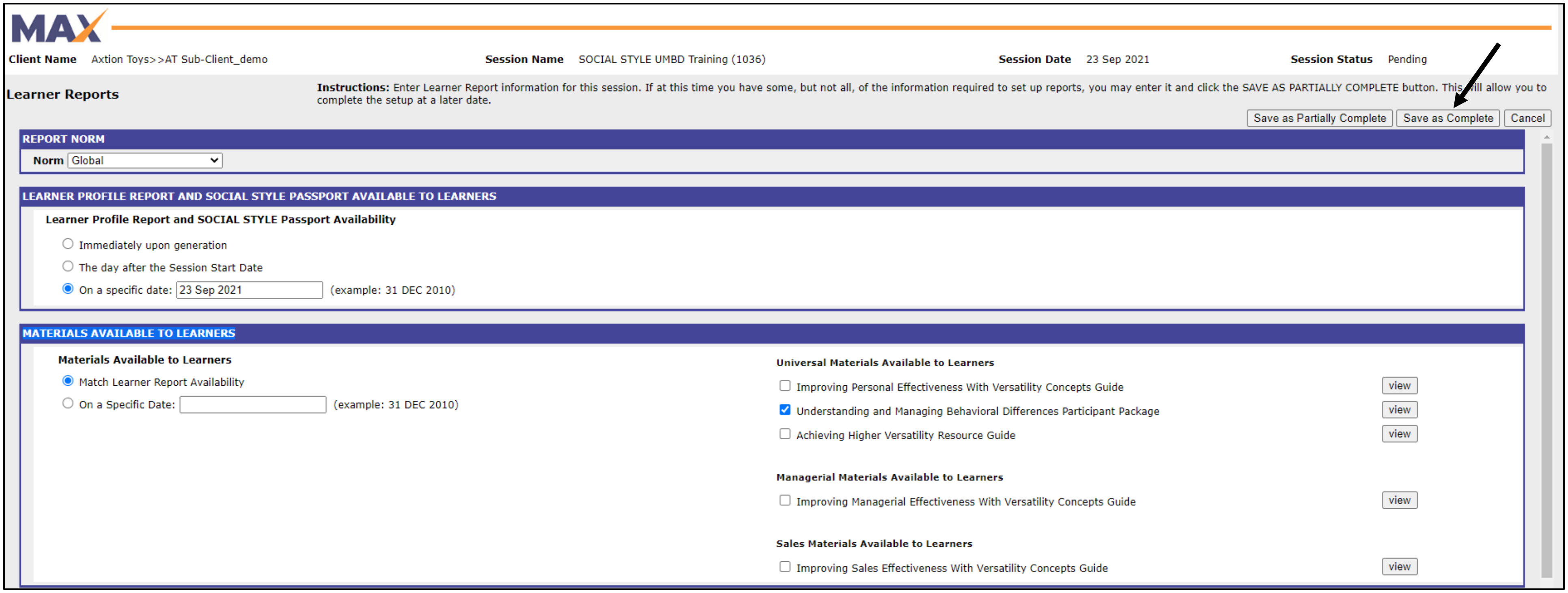
- Immediately upon generation – Reports will be available for Learners to download at TRACOM Learning as soon as the report generates.
- The day after the session start date – Generated reports will be available for Learners to download at TRACOM Learning one day after the Session Start Date.
- On a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


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 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: 23 Sep 2021 (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
Understanding and Managing Behavioral Differences Participant Package
Achieving Higher Versatility Resource Guide
Managerial Materials Available to Learners
Improving Managerial Effectiveness With Versatility Concepts Guide
Sales Materials Available to Learners
Improving Sales Effectiveness With Versatility Concepts Guide
view
view
view
view
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 **Activation Date -> Report Date**	**Additional Reports: Pre-Session** **Report Date + 1 -> Start Date - 1**	**Late Reports: Post-Session** **Start Date -> Start Date + 30**
	Unknown - 18 Sep 2024	19 Sep 2024 - 22 Sep 2024	23 Sep 2024 - 23 Oct 2024
Who will generate reports?	System Will Auto Generate	System Will Auto Generate	System Will Auto Generate
When should the reports be generated?	X Days Before Session Start Date (Enter Below) 5	Immediately	Immediately
Who should be notified when reports are generated?	☑ Admin ☐ Learner ☐ Facilitator Francesca Facilitator (苹果 营业额)	☑ Admin ☐ Learner ☐ Facilitator Francesca Facilitator (苹果 营业额)	☑ Admin ☐ Learner ☐ Facilitator Francesca Facilitator (苹果 营业额)

* Required Field

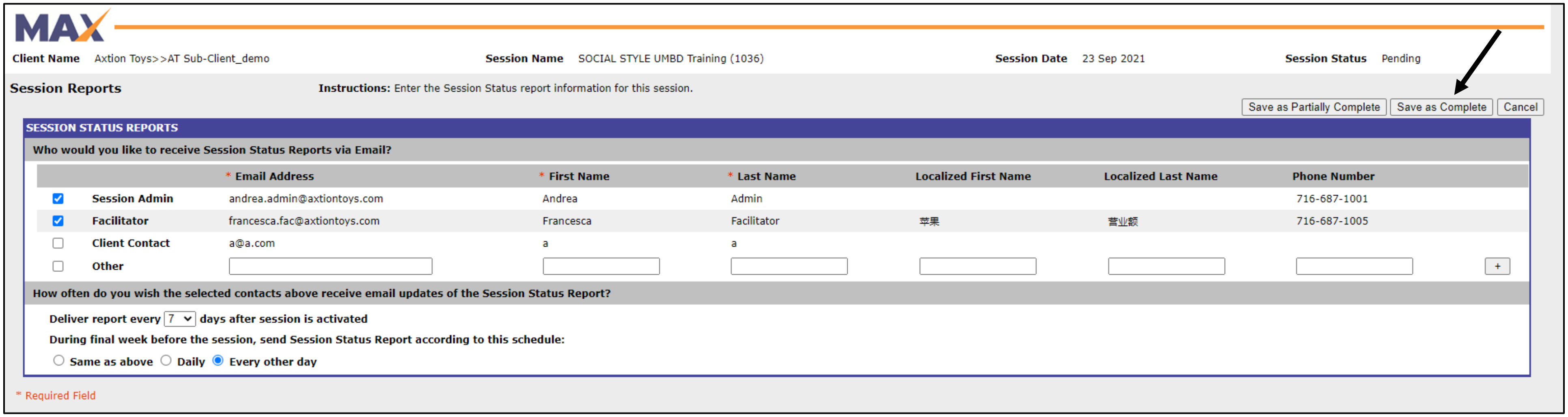
When finished, click Save As Complete at the top of the screen.

<u>Session Reports</u>:

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.

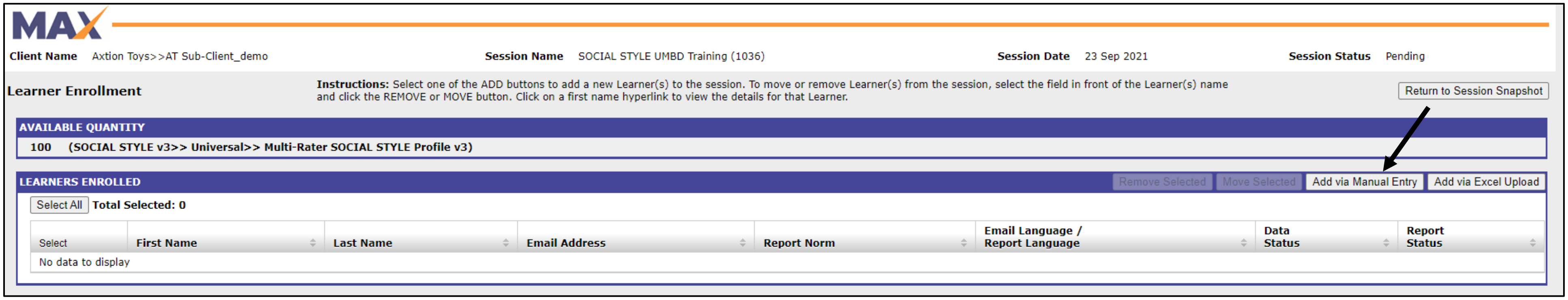
- Check the box next to the individual you want to receive status reports.
- Select the frequency to send Session Status Reports. This can be changed before AND after session activation.
- During the last week before the Session Start Date, you may increase the frequency.

When finished, click Save As Complete.



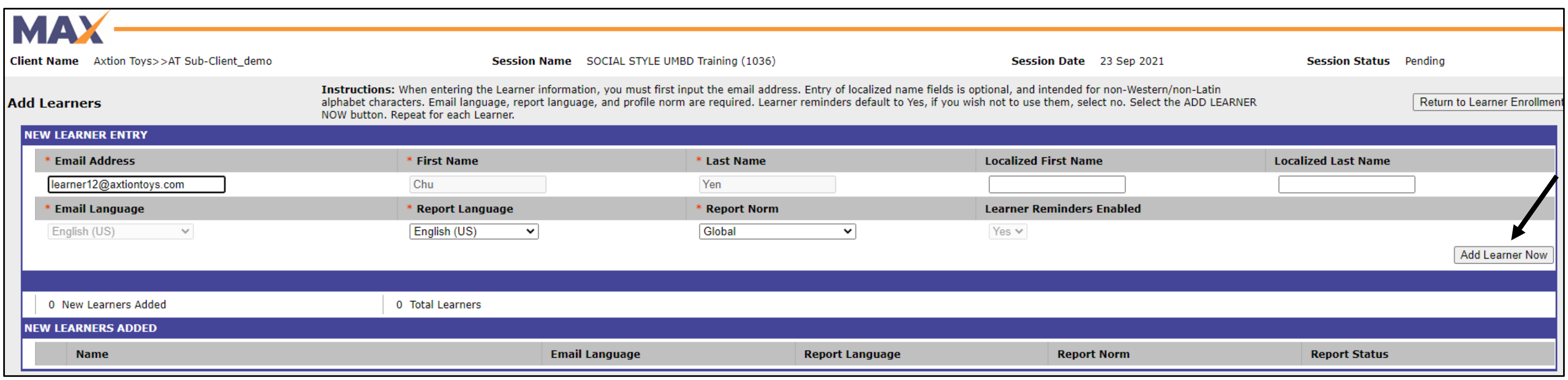
Learner Enrollment:

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.

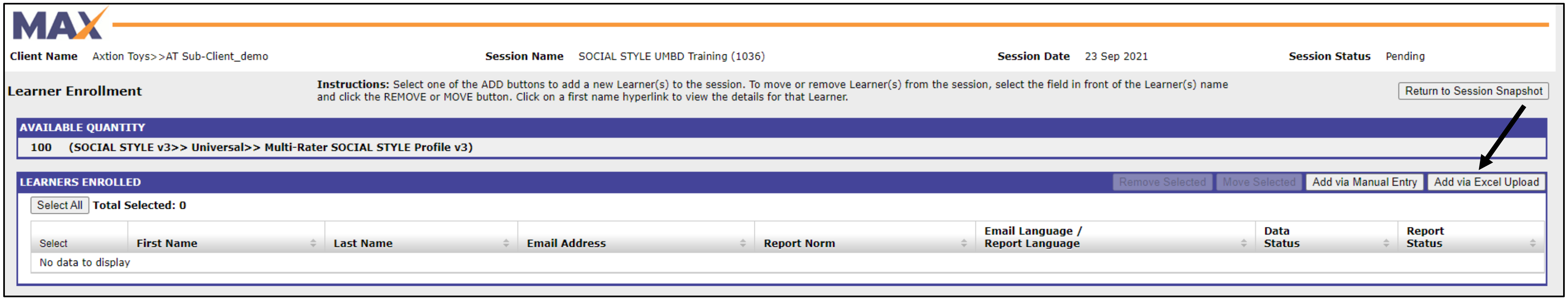


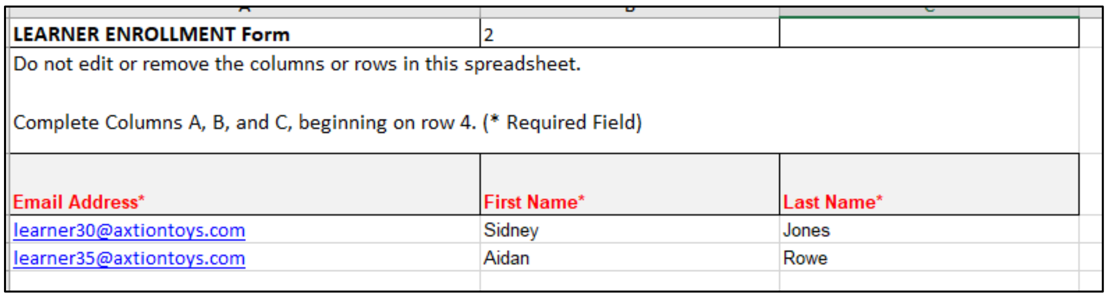
Click Add via Manual Entry to add each learner individually.

- 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.

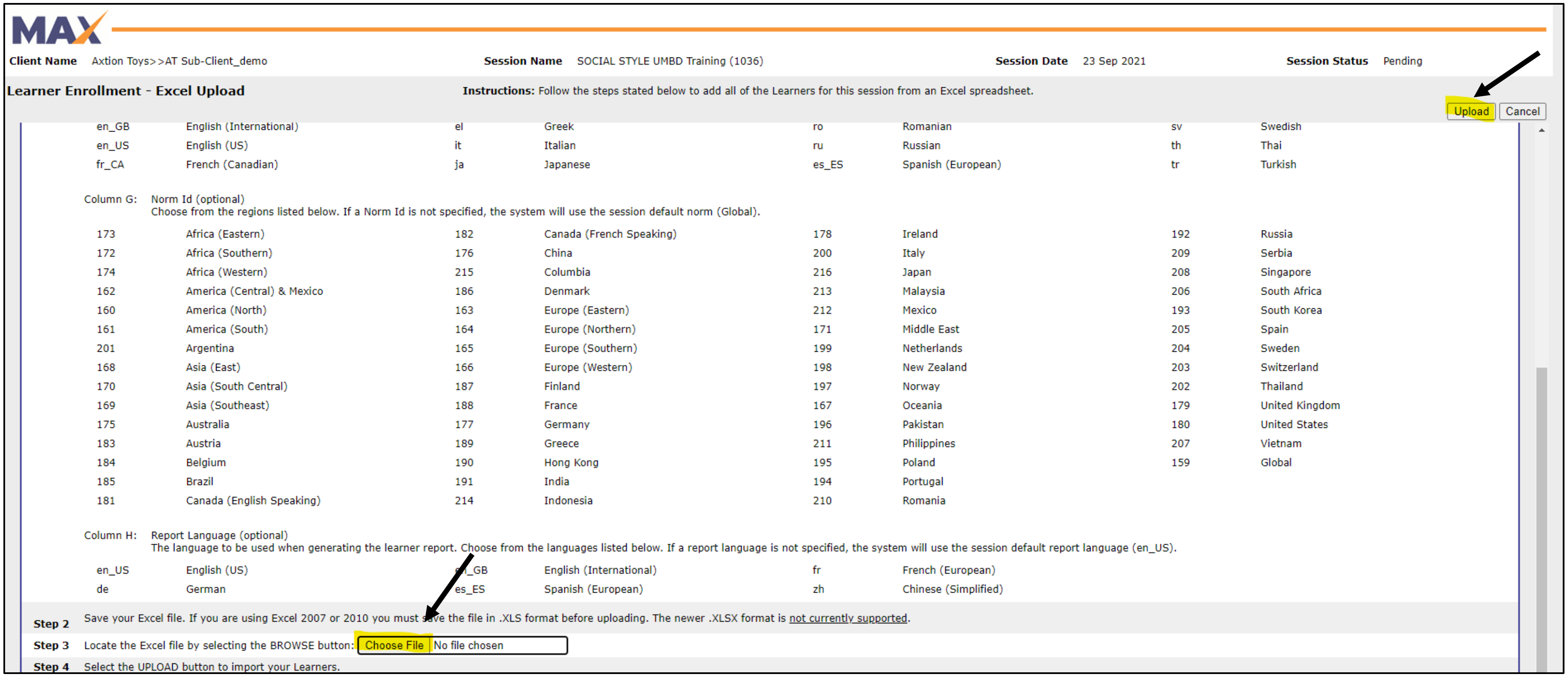


Click Add via Excel Upload to upload multiple learners at the same time.





- 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.



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 - 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		

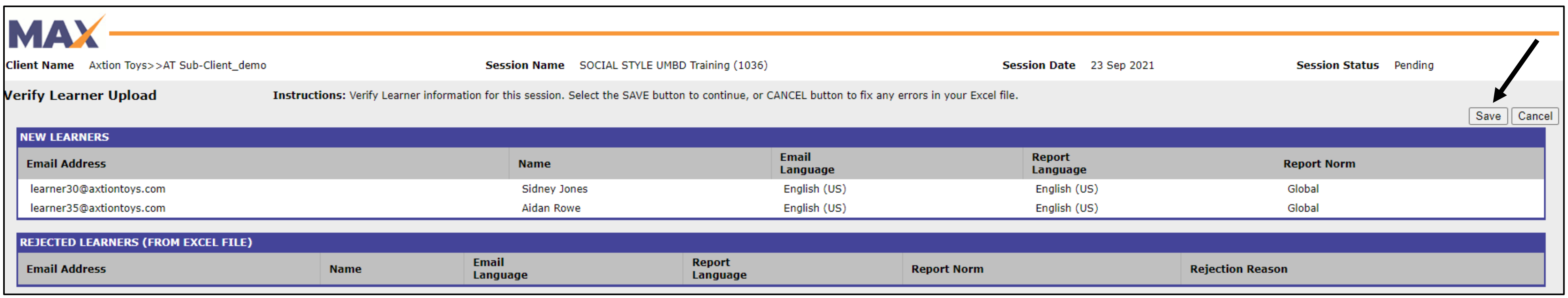
Column H: Report Language (optional)
The language to be used when generating the learner report. Choose from the languages listed below. If a report language is not specified, the system will use the session default report language (en_US).

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.



MAX

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

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

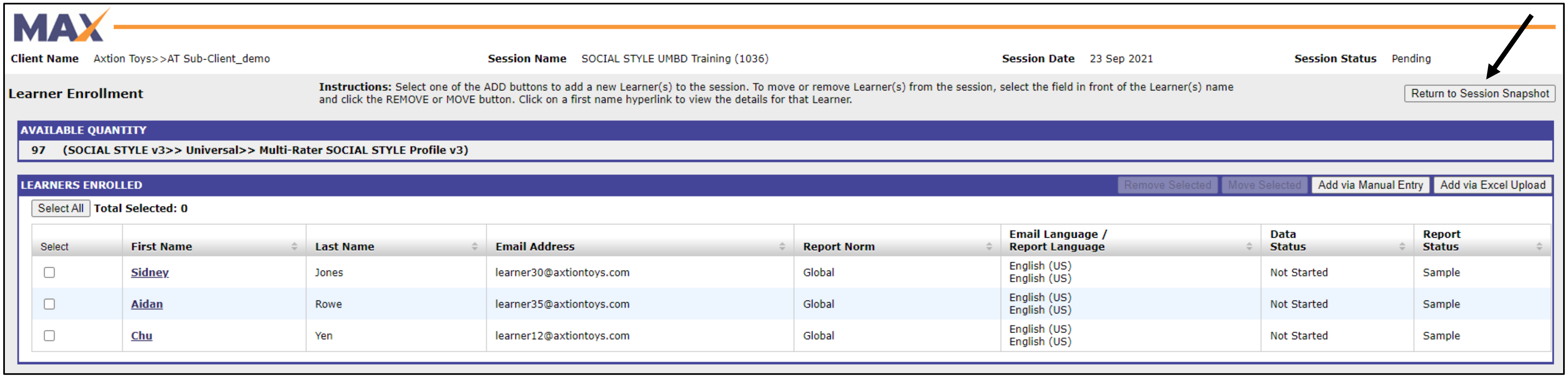
REJECTED LEARNERS (FROM EXCEL FILE)

Email Address	Name	Email Language	Report Language	Report Norm	Rejection Reason

Learner Enrollment Screen:

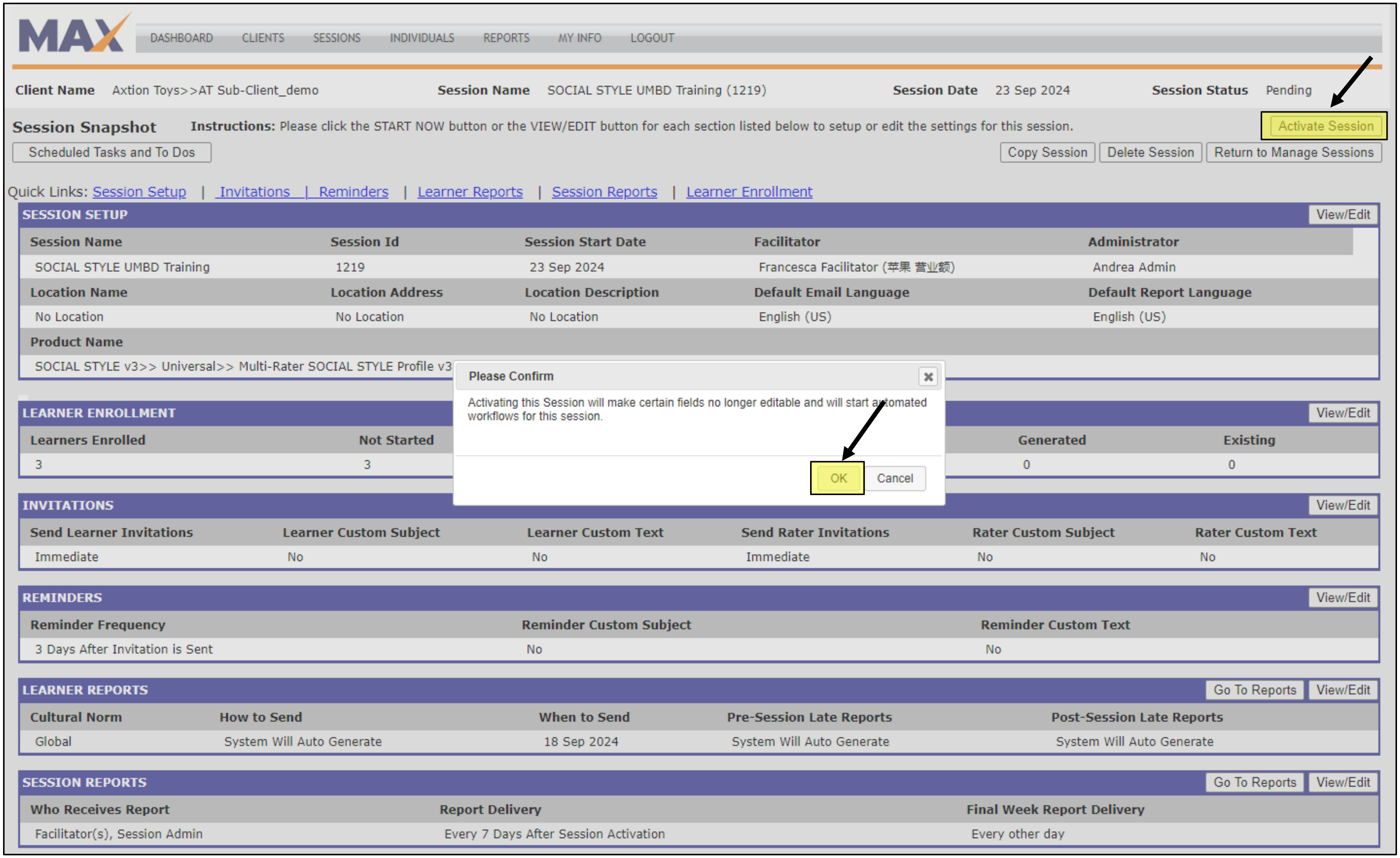
- Shows learner names and email addresses.
- Shows Norm, Email Language, Data Status (Not Started, Started, Sufficient Data, Generated) and Report Status (Sample, Generated, Downloaded) for each Learner enrolled.
- Learners may be added, removed, or moved from this screen.

When finished, click Return to Session Snapshot.

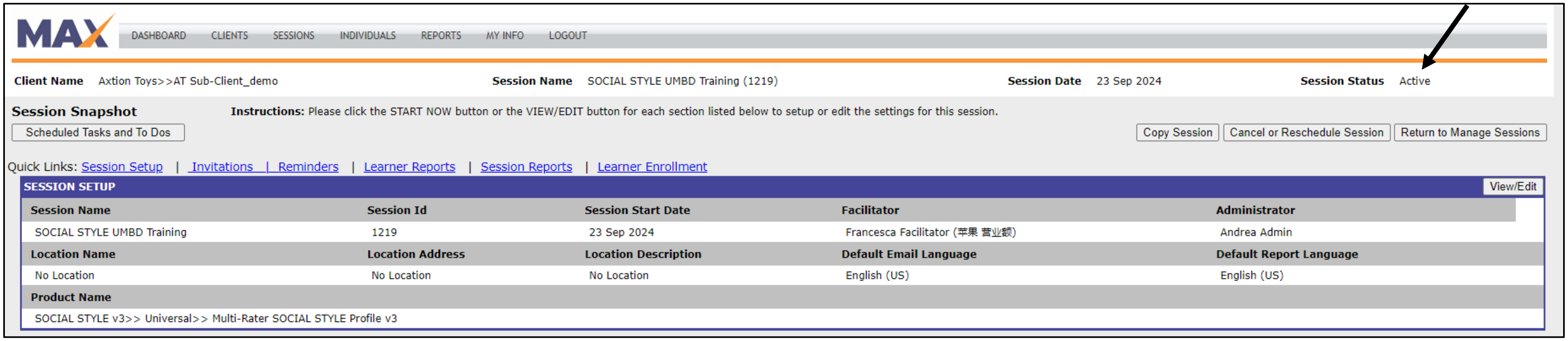


Activate Session:

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



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

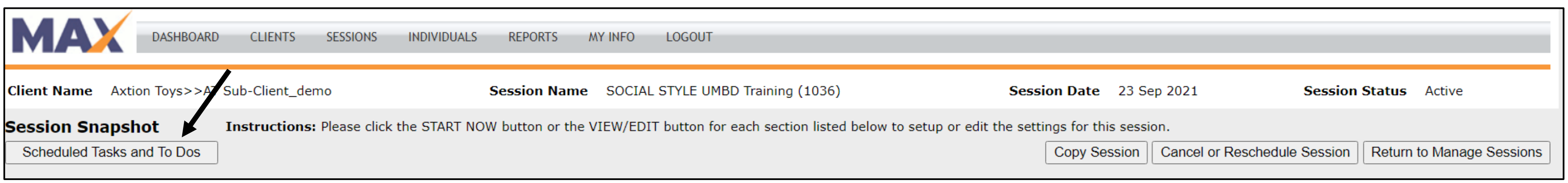


ADDITIONAL INFORMATION TO ASSIST <u>AFTER</u> SESSION ACTIVATION

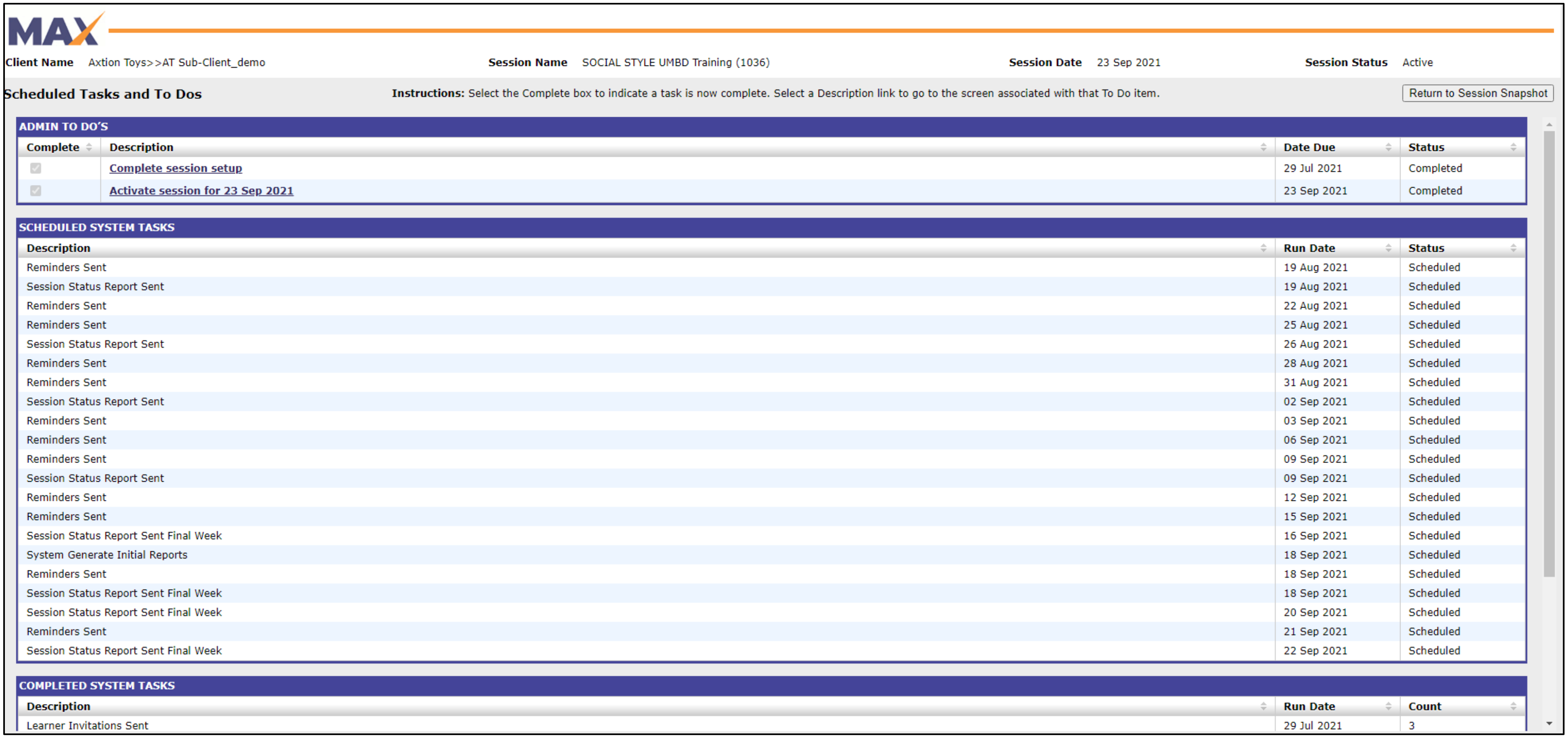
<u>Scheduled Tasks and To Dos</u>:

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:



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 Axtion Toys>>AT Sub-Client_demo **Session Name** SOCIAL STYLE UMBD Training (1036) **Session Date** 23 Sep 2021 **Session Status** Active

Scheduled Tasks and To Dos

Instructions: 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.

Return to Session Snapshot

ADMIN TO DO'S

Complete	Description	Date Due	Status
☑	Complete session setup	29 Jul 2021	Completed
☑	Activate session for 23 Sep 2021	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

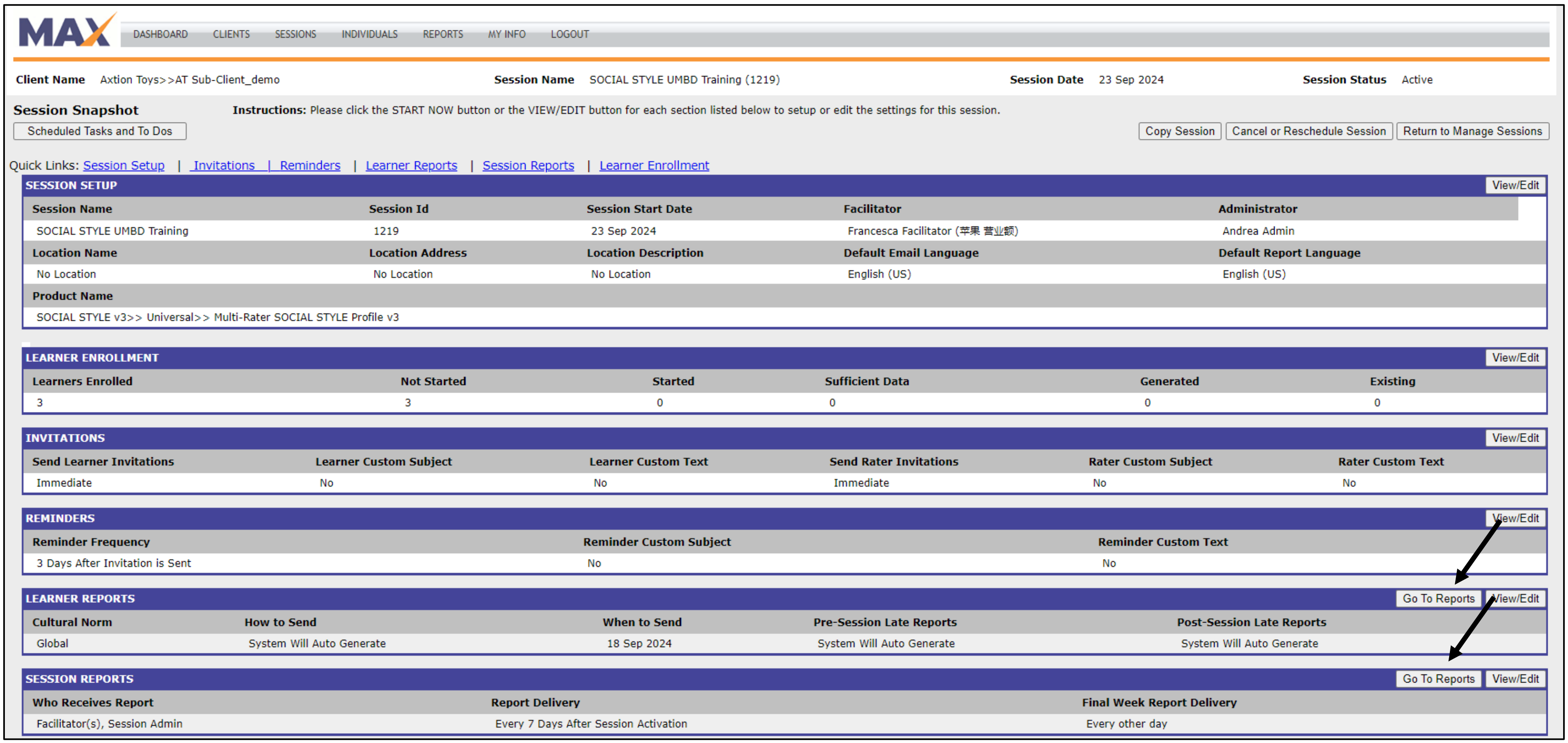
COMPLETED SYSTEM TASKS

Description	Run Date	Count
Learner Invitations Sent	29 Jul 2021	3

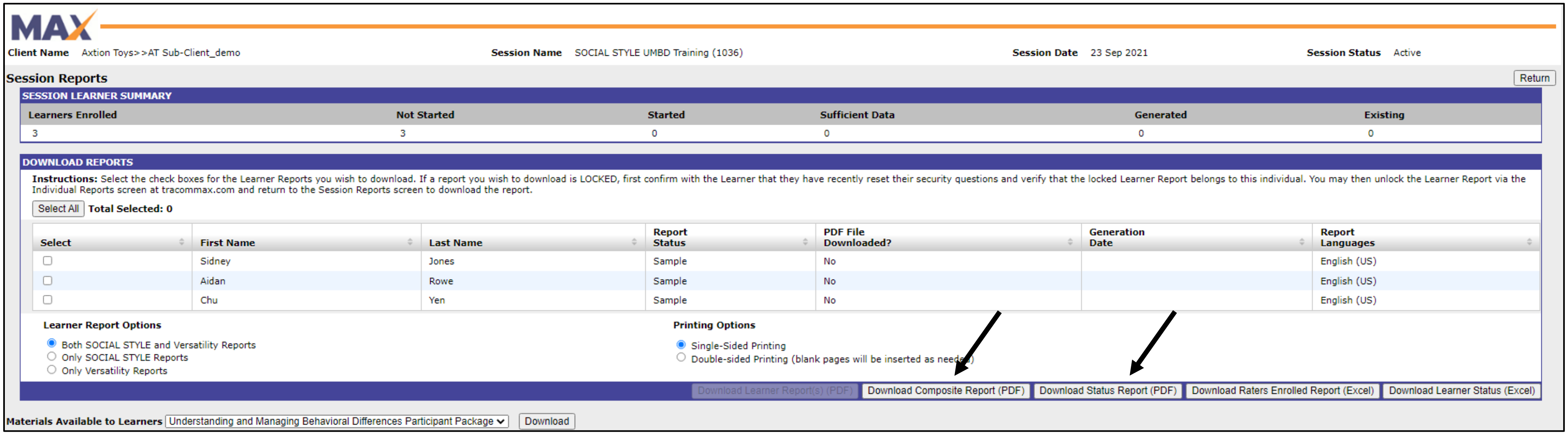
Session Reports:

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:



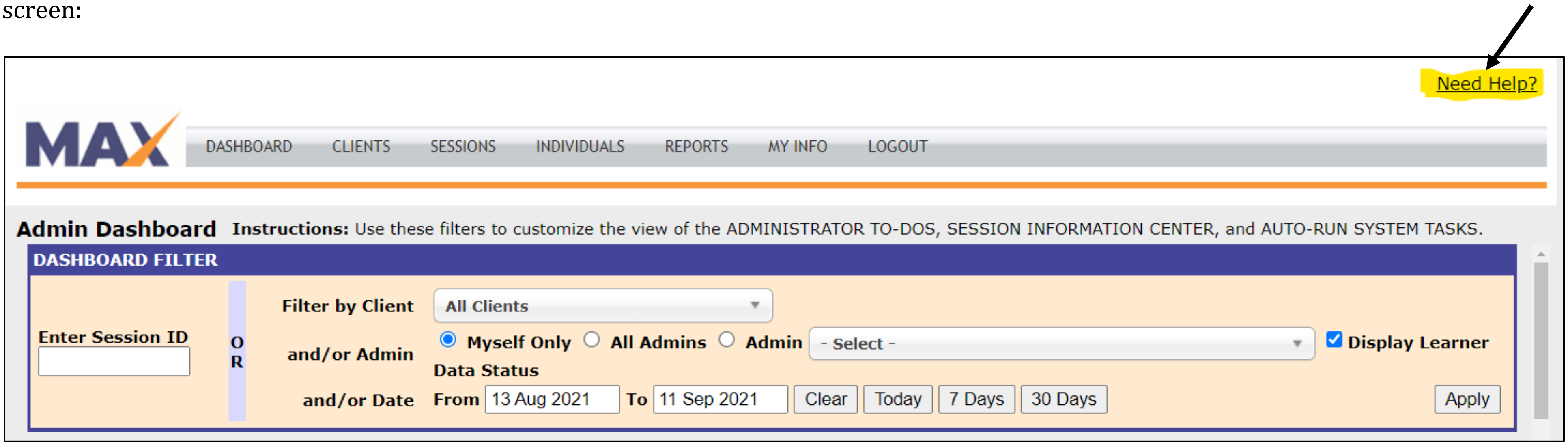
Click the button for the report which you would like to access:



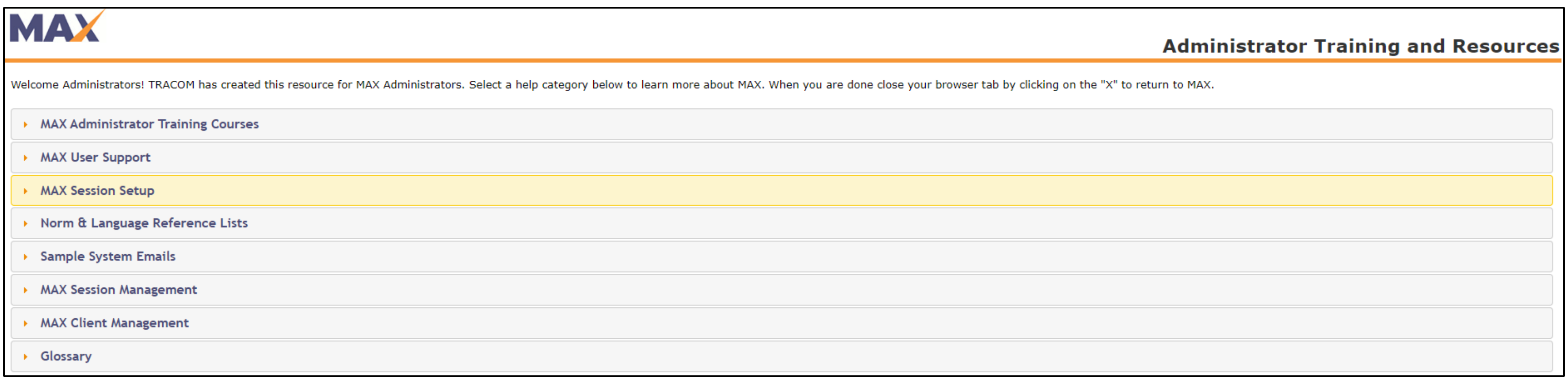
**Please note : Composite Reports will not contain learner data until after the reports have generated.

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:



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.



For further support or information, please use the MAX Help portal or contact support@tracom.com