



SESSION SETUP INSTRUCTIONS FOR eLEARNING MULTI-RATER PROFILES

Log in to 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 'Sessions', with 'Add Session' highlighted by a black arrow. Below the menu, the 'Admin Dashboard' section includes a 'DASHBOARD FILTER' with fields for 'Enter Session ID', 'Filter by Client' (set to 'All Clients'), 'and/or Admin' (radio buttons for 'Myself Only', 'All Admins', 'Admin'), and 'and/or Date' (date range from 29 Jul 2021 to 27 Aug 2021). There is also a 'Display Learner Data Status' checkbox. Below the filter is an 'ADMIN TO DO'S' table with columns: Done, Description, Date Due, Client Name, Session Name, Session Date or Due Date, and To Do Status. The table currently shows 'No data to display'. Below that is the 'SESSION INFORMATION CENTER' with an 'Active' section containing a table of sessions.

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 includes an 'Instructions' section: 'Please select the client from the tree display to see more details'. The 'CLIENT LIST' section has a 'Client' dropdown set to 'Axtion Toys' and a 'Select' button. The 'CLIENT TREE' section has a 'Search Criteria' input field. The 'TREE RESULTS' section shows a tree structure with 'Axtion Toys' selected, indicated by a black arrow. Below it are 'AT Sub-Client' and 'AT Sub-Client_demo'.

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

Client Name Axtion Toys

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.

Submit Cancel

SESSION INFORMATION

Product [SOCIAL STYLE v3>>Universal>>eLearning >> Introduction to SOCIAL STYLE v3 On Demand - w/Multi-Rater Profile]

SESSION LANGUAGES

EMAIL

Default Language [English (US)]

LEARNER REPORTS

Default Language [English (US)]

Session Details:

- Session Name: Enter the name of your session. It should reflect the training materials or team as needed (for example, SOCIAL STYLE Certification). The Session Name will appear on emails, to-do lists, and profile reports.
- Due Date: The Due Date is the date by which all tasks should be completed. 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 Due 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



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](#) |

SESSION PRODUCT

Change Product

Product Learning Survey>>SOCIAL STYLE v3>>eLearning >> Introduction to SOCIAL STYLE v3 On Demand - w/Multi-Rater Profile

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

* Due Date

SESSION ADMINISTRATOR

* Session Administrator

SESSION FACILITATORS

Add Facilitator

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

Email Address


Name

Phone Number

No facilitator Specified

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

Client Name Action Toys **Session Name** SOCIAL STYLE v3 eLearning (1040) **Due Date** 09 Sep 2021 **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	Due Date	Facilitator	Administrator
SOCIAL STYLE v3 eLearning	1040	09 Sep 2021		Andrea Admin
Default Email Language		Default Report Language		
English (US)		English (US)		
Product Name				
SOCIAL STYLE v3>> Universal>> eLearning >> Introduction to SOCIAL STYLE v3 On Demand - w/Multi-Rater Profile				

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 Due 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 Due 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, Due 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).

MAX

Client Name Axtion Toys Session Name SOCIAL STYLE v3 eLearning (1040) Due Date 09 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> to be completed by <#SESSION_DATE>
 Custom Subject []

Custom Text (optional):

Please complete the tasks requested - self-assessment, invite at least 5 raters, and all of the eLearning modules - at your earliest convenience. The report will generate and be available to download on 04 September. For questions regarding the this request, please contact the administrator at the email address below.

[]

<#CUSTOM_TEXT>

In preparation for your learning event to be completed by <#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 Custom Subject
Provide feedback for <#FULL_NAME>

Custom Text (optional):
Please complete the feedback for your colleague at your earliest convenience.

<#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 - eLearning Standalone Products

From : TRACOM Learning admin@maxproddata1.tracom.com

Standard Subject line: Invitation for <Name of Session> to be completed by <eLearning Due Date>

<Optional – CUSTOM TEXT APPEARS HERE>

In preparation for your learning event to be completed by <#eLearning Due 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

<#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.

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 Due 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: Action Toys | Session Name: SOCIAL STYLE v3 eLearning (1040) | Due Date: 09 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.

Save as Partially Complete | Save as Complete | Cancel

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

REMINDER DELIVERY
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 5 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.

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 Due date – Generated reports will be available for Learners to download at TRACOM Learning one day after the Due 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.

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 Due 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 Participant Package
- Achieving Higher Versatility Resource Guide

view

view

REPORT GENERATION & NOTIFICATION

3 Report Generation Periods:

- **Initial Report Generation** – The default initial report generation date is 5 days before the Session Due 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 Due Date. When the Report Date is reached, profiles will generate at 6 pm Mountain Time for all Learners with Sufficient Data (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 Due Date. All reports during this time period will generate immediately when a learner receives Sufficient Data (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 Due Date and will generate reports immediately when a Learner receives Sufficient Data (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-Due Date	Late Reports:Post-Due Date
	Activation Date -> Report Date	Report Date + 1 -> Due Date - 1	Due Date -> Due Date + 30
	Unknown - 04 Sep 2021	05 Sep 2021 - 08 Sep 2021	09 Sep 2021 - 09 Oct 2021
Who will generate reports?	<input type="text" value="System Will Auto Generate"/>	<input type="text" value="System Will Auto Generate"/>	<input type="text" value="System Will Auto Generate"/>
When should the reports be generated?	<input type="text" value="X Days Before Due Date (Enter Below)"/> <input type="text" value="5"/>	<input type="text" value="Immediately"/>	<input type="text" value="Immediately"/>
Who should be notified when reports are generated?	<input checked="" type="checkbox"/> Admin <input checked="" type="checkbox"/> Learner <input type="checkbox"/> Facilitator Frank Facilitator	<input checked="" type="checkbox"/> Admin <input checked="" type="checkbox"/> Learner <input type="checkbox"/> Facilitator Frank Facilitator	<input checked="" type="checkbox"/> Admin <input checked="" type="checkbox"/> Learner <input type="checkbox"/> Facilitator Frank Facilitator

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 Due Date, you may increase the frequency.

When finished, click Save As Complete.

Client Name AxTion Toys Session Name SOCIAL STYLE v3 eLearning (1040) Due Date 09 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 type="checkbox"/>	Client Contact	Alex.barker@axtiontoys.com	Alex	Barker		716-687-1000
<input type="checkbox"/>	Other	<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

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: Axtion Toys Session Name: SOCIAL STYLE v3 eLearning (1040) Due Date: 09 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
1000 (SOCIAL STYLE v3>> Universal>> eLearning >> Introduction to SOCIAL STYLE v3 On Demand - w/Multi-Rater Profile)

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: Axtion Toys Session Name: SOCIAL STYLE v3 eLearning (1040) Due Date: 09 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 learner23@axtontoy.com	* First Name Jing	* Last Name Liu	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
------	----------------	-----------------	-------------	---------------

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

LEARNER ENROLLMENT Form		
2		
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*
learner30@axtiontoys.com	Sidney	Jones
learner35@axtiontoys.com	Aidan	Rowe

- 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.

Client Name: Axion Toys Session Name: SOCIAL STYLE v3 eLearning (1040) Due Date: 09 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.

Column E: Localized Last Name (optional)

Column F: Email Language. (optional)
The language to use when sending emails to this Learner. Choose from the languages listed below. If an email language is not specified, the system will use the learner's default email language. If that is not specified, the system will use the session default email language (en_US)

bg	Bulgarian	fr	French (European)	ko	Korean	es	Spanish (Latin American)
zh	Chinese (Simplified)	de	German	pt_BR	Portuguese (Brazilian)	es_MX	Spanish (Mexican)
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.

NEW LEARNERS

Email Address	Name	Email Language	Report Language	Report Norm
learner30@axiontoys.com	Sidney Jones	English (US)	English (US)	Global
* The name you entered (Sydney Jones) was changed due to a previous registration.				
learner35@axiontoys.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

MAX Client Name: Axtion Toys Session Name: SOCIAL STYLE v3 eLearning (1040) Due Date: 09 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
997 (SOCIAL STYLE v3>> Universal>> eLearning >> Introduction to SOCIAL STYLE v3 On Demand - w/Multi-Rater Profile)

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"/>	Sidnev	Jones	learner30@axtiontoys.com	Global	English (US) English (US)	Not Started	Sample
<input type="checkbox"/>	Jing	Liu	learner23@axtiontoys.com	Global	English (US) English (US)	Not Started	Sample
<input type="checkbox"/>	Aidan	Rowe	learner35@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 Session Name: SOCIAL STYLE v3 eLearning (1040) Due Date: 09 Sep 2021 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.

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

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

SESSION SETUP View/Edit

Session Name	Session Id	Due Date	Facilitator	Administrator
SOCIAL STYLE v3 eLearning	1040	09 Sep 2021		Andrea Admin
Default Email Language	Default Report Language			
English (US)	English (US)			
Product Name	SOCIAL STYLE v3>> Universal>> eLearning >> Introduction to SOCIAL STYLE v3 On Demand - w/Multi-Rater Profile			

LEARNER ENROLLMENT View/Edit

Learners Enrolled	Not Started	Generated	Existing
3	3	0	0

INVITATIONS View/Edit

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

REMINDERS View/Edit

Reminder Frequency	Reminder Custom Subject	Reminder Custom Text
5 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	04 Sep 2021	System Will Auto Generate	System Will Auto Generate

SESSION REPORTS Go To Reports View/Edit

Who Receives Report	Report Delivery	Final Week Report Delivery
Session Admin	Every 5 Days After Session Activation	Every 5 Days After Session Activation

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

MAX DASHBOARD CLIENTS SESSIONS INDIVIDUALS REPORTS MY INFO TRACOM ADMIN LOGOUT

Client Name: Axtion Toys Session Name: SOCIAL STYLE v3 eLearning (1040) Due Date: 09 Sep 2021 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 Review Session Changes 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	Due Date	Facilitator	Administrator
SOCIAL STYLE v3 eLearning	1040	09 Sep 2021	Frank Facilitator	Andrea Admin

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 links: DASHBOARD, CLIENTS, SESSIONS, INDIVIDUALS, REPORTS, MY INFO, and LOGOUT. Below this, the session details are displayed: Client Name: Axtion Toys, Session Name: SOCIAL STYLE v3 eLearning (1040), Due Date: 09 Sep 2021, and Session Status: Active. A 'Session Snapshot' section contains an arrow pointing to a button labeled 'Scheduled Tasks and To Dos'. Other buttons in this section include 'Copy Session', 'Cancel or Reschedule Session', and 'Return to Manage Sessions'. Instructions for the snapshot are provided: '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.'

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

Client Name	Axtion Toys	Session Name	SOCIAL STYLE v3 eLearning (1040)	Due Date	09 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					
<input checked="" type="checkbox"/>	Complete session setup	13 Aug 2021	Completed					
<input checked="" type="checkbox"/>	Activate session for 09 Sep 2021	09 Sep 2021	Completed					
SCHEDULED SYSTEM TASKS								
Description	Run Date	Status						
Reminders Sent	18 Aug 2021	Scheduled						
Session Status Report Sent	18 Aug 2021	Scheduled						
Reminders Sent	23 Aug 2021	Scheduled						
Session Status Report Sent	23 Aug 2021	Scheduled						
Reminders Sent	28 Aug 2021	Scheduled						
Session Status Report Sent	28 Aug 2021	Scheduled						
Reminders Sent	02 Sep 2021	Scheduled						
Session Status Report Sent Final Week	02 Sep 2021	Scheduled						
System Generate Initial Reports	04 Sep 2021	Scheduled						
Reminders Sent	07 Sep 2021	Scheduled						
Session Status Report Sent Final Week	07 Sep 2021	Scheduled						
COMPLETED SYSTEM TASKS								
Description	Run Date	Count						
Learner Invitations Sent	13 Aug 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 Axton Toys **Session Name** SOCIAL STYLE v3 eLearning (1040) **Due Date** 09 Sep 2021 **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	Due Date	Facilitator	Administrator
SOCIAL STYLE v3 eLearning	1040	09 Sep 2021	Frank Facilitator	Andrea Admin
Default Email Language		Default Report Language		
English (US)		English (US)		
Product Name				
SOCIAL STYLE v3>> Universal>> eLearning >> Introduction to SOCIAL STYLE v3 On Demand - w/Multi-Rater Profile				

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	Yes	Immediate	No	Yes

REMINDERS View/Edit

Reminder Frequency	Reminder Custom Subject	Reminder Custom Text
5 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	04 Sep 2021	System Will Auto Generate	System Will Auto Generate

SESSION REPORTS Go To Reports View/Edit

Who Receives Report	Report Delivery	Final Week Report Delivery
Session Admin	Every 5 Days After Session Activation	Every 5 Days After Session Activation

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

MAX
 Client Name: Axlion Toys Session Name: SOCIAL STYLE v3 eLearning (1040) Due Date: 09 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	eLearning Status	PDF File Downloaded?	Generation Date	Report Languages
<input type="checkbox"/>	Sidney	Jones	Sample	Not Started	No		English (US)
<input type="checkbox"/>	Jing	Liu	Sample	Not Started	No		English (US)
<input type="checkbox"/>	Aidan	Rowe	Sample	Not Started	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)

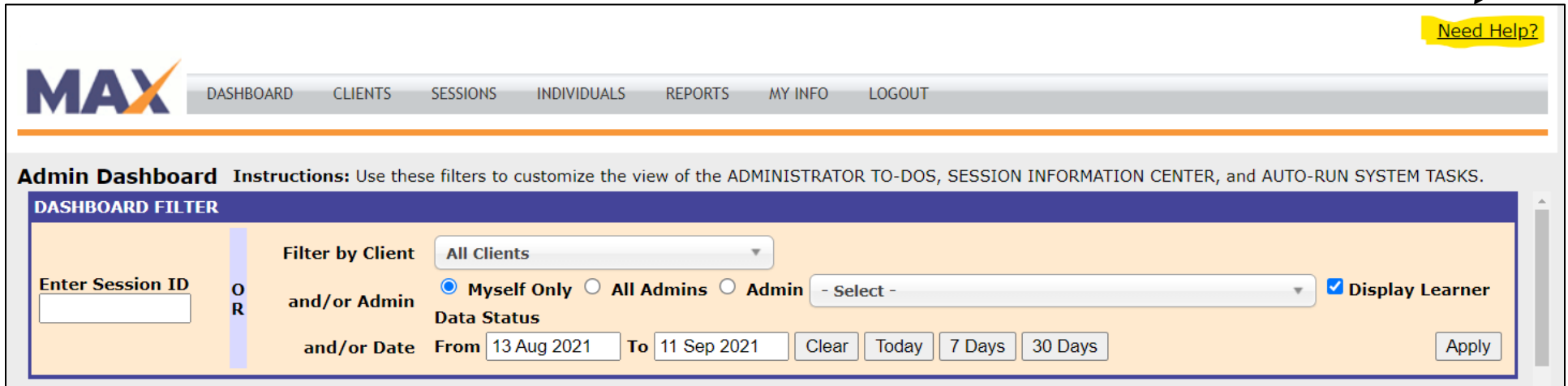
Download Learner Report(s) (PDF) Download Composite Report (PDF) Download Status Report (PDF) Download Raters Enrolled Report (Excel) Download Learner Status (Excel)

Materials Available to Learners: Improving Personal Effectiveness With Versatility Concepts Guide 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:



MAX DASHBOARD CLIENTS SESSIONS INDIVIDUALS REPORTS MY INFO LOGOUT

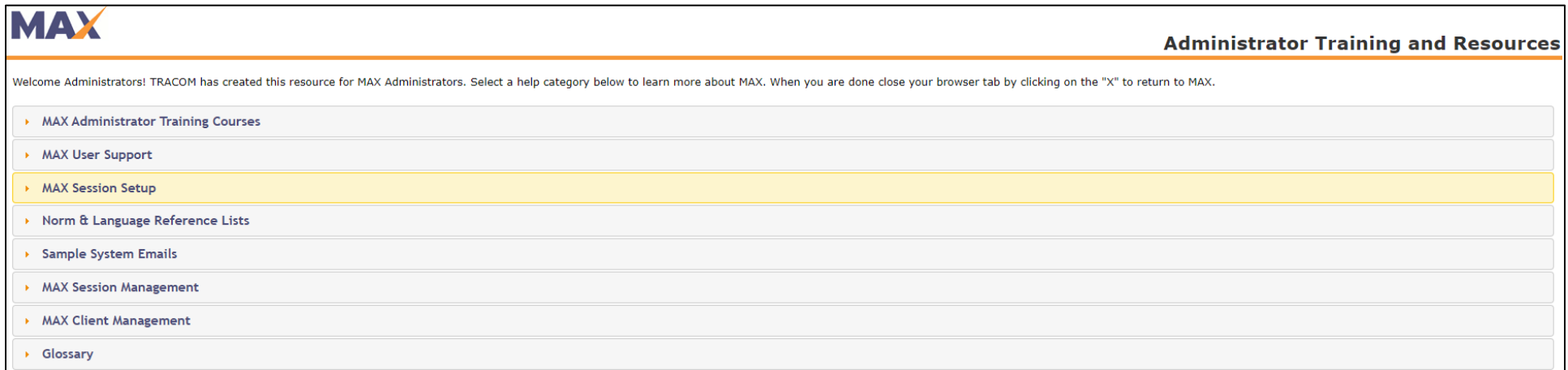
Need Help?

Admin Dashboard Instructions: Use these filters to customize the view of the ADMINISTRATOR TO-DOS, SESSION INFORMATION CENTER, and AUTO-RUN SYSTEM TASKS.

DASHBOARD FILTER

Enter Session ID OR Filter by Client and/or Admin Myself Only All Admins Admin Display Learner Data Status and/or Date From To

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.



MAX Administrator Training and Resources

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.

- MAX Administrator Training Courses
- MAX User Support
- MAX Session Setup
- Norm & Language Reference Lists
- Sample System Emails
- MAX Session Management
- MAX Client Management
- Glossary

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