SESSION SETUP INSTRUCTIONS FOR SELF-PERCEPTION 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 IPEV 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>>Self-Perception 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 IPEV Training`

* Session Start Date   `20 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	
frank.fac@axtiontoys.com	Frank Facilitator	716-687-1006	[Remove]

Session Setup:

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

Invitations:

LEARNER INVITATION DELIVERY - (Learners are the participants in the training session)

- 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 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)

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.

When finished, click Save As Complete.

Reminders:

Reminders will be sent out to all Learners 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. You may also add custom text to the reminder to appear above the standard text.

When finished, click Save As Complete.

<u>Learner Reports</u>:

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: https://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.

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] [Can

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 setting is immediately – as soon as the learner completes the self-assessment survey. This is the recommended setting for self-perception sessions. 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 Date. All reports during this time period will generate immediately when a learner completes the self-assessment survey. 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. This period lasts for 30 days AFTER the Session Start Date and will generate reports immediately when a learner completes the self-assessment survey. You may select to notify the Learner, Admin or Facilitator when reports generate during this period as well.

When finished, click Save As Complete.

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 - Activation Date	Activation Date + 1 - 19 Sep 2024	20 Sep 2024 - 20 Oct 2024
Who will generate reports?	System Will Auto Generate ▾	System Will Auto Generate ▾	System Will Auto Generate ▾
When should the reports be generated?	Immediately ▾	Immediately ▾	Immediately ▾
Who should be notified when reports are generated?	☑ Admin ☐ Learner ☐ Facilitator Frank Facilitator	☑ Admin ☐ Learner ☐ Facilitator Frank Facilitator	☑ Admin ☐ Learner ☐ Facilitator Frank Facilitator

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.

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

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
☐	Session Admin	andrea.admin@axtiontoys.com	Andrea	Admin			716-687-1001
☐	Facilitator	frank.fac@axtiontoys.com	Frank	Facilitator			716-687-1006
☐	Client Contact	a@a.com	a	a			
☐	Other						

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

Deliver report every [7 ▾] 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 Rep.

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, 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.

Click Add via Excel Upload to use the Learner Enrollment Form provided by TRACOM 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.

Client Name Axtion Toys>>AT Sub-Client_demo **Session Name** SOCIAL STYLE IPEV Training (1035) **Session Date** 20 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]

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.

Client Name Axtion Toys>>AT Sub-Client_demo **Session Name** SOCIAL STYLE IPEV Training (1035) **Session Date** 20 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
Allen@testprofile.com	Allen A1WW	English (US)	English (US)	Global

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).
- 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

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:

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

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:

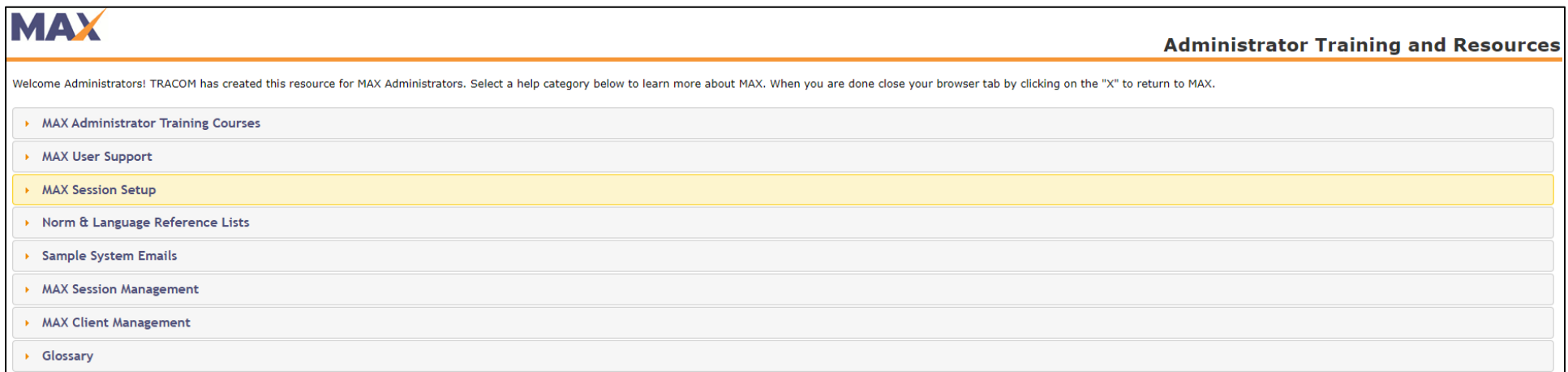**Please note : Composite Reports will not contain learner data until after the reports have generated.

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