



SESSION SETUP INSTRUCTIONS FOR eLEARNING 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:

The screenshot shows the MAX Admin Dashboard. The top navigation bar includes 'DASHBOARD', 'CLIENTS', 'SESSIONS', 'INDIVIDUALS', 'REPORTS', 'MY INFO', and 'LOGOUT'. The 'SESSIONS' tab is selected. Below the navigation bar, there is a 'Dashboard Filter' section with fields for 'Enter Session ID', 'Filter by Client' (set to 'All Clients'), 'and/or Admin' (with radio buttons for 'Myself Only', 'All Admins', and 'Admin'), and 'and/or Date' (with a date range from '23 Mar 2020' to '21 Apr 2020'). An arrow points to the 'Add Session' button in the top right corner of the dashboard.

Choose the correct client for your session:

The screenshot shows the 'Add a New Session' page. It includes instructions: 'Please select the client under which you would like to add a session. Use either the dropdown list or tree display to find the desired client. Move your mouse over a client name in the tree display to see more details about that client. Select the client to continue.' The 'CLIENT LIST' section has a dropdown menu for 'Client' set to 'Action Toys' and a 'Select' button. The 'CLIENT TREE' section has a 'Search Criteria' input field. The 'TREE RESULTS' section shows a tree structure with 'Action Toys' as the root, and 'AT Sub-Client' and 'AT Sub-Client_demo' as sub-clients. An arrow points to the 'AT Sub-Client_demo' sub-client.

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

MAX
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.

SESSION INFORMATION
Product [SOCIAL STYLE v3>>Universal>>eLearning >> Improving Personal Effectiveness with Versatility v3 On Demand - w/Self-Perception Profile ▼]

SESSION LANGUAGES

EMAIL
Default Language [English (US) ▼]

LEARNER REPORTS
Default Language [English (US) ▼]

Submit Cancel

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 eLearning). 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 >> Improving Personal Effectiveness with Versatility v3 On Demand – w/Self-Perception Profile

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

* 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		

* Required Field

Session Setup:

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

MAX DASHBOARD CLIENTS SESSIONS INDIVIDUALS REPORTS MY INFO LOGOUT

Client Name Axtion Toys **Session Name** SOCIAL STYLE IPEV eLearning (1041) **Due Date** 11 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.

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

SESSION SETUP <input type="button" value="View/Edit"/>				
Session Name	Session Id	Due Date	Facilitator	Administrator
SOCIAL STYLE IPEV eLearning	1041	11 Sep 2021		Andrea Admin
Default Email Language		Default Report Language		
English (US)		English (US)		
Product Name				
SOCIAL STYLE v3>> Universal>> eLearning >> Improving Personal Effectiveness with Versatility v3 On Demand - w/Self-Perception Profile				

Invitations

Reminders

Learner Reports

Session Reports

Learner Enrollment

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 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

LEARNER INVITATION TEXT:

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.

When finished, click Save As Complete.

MAX

Client Name Axion Toys Session Name SOCIAL STYLE IPEV eLearning (1041) Due Date 11 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.

Learner Email Links: [English \(US\)](#) | [Customize Additional Email Language](#) Save as Partially Complete Save as Complete Cancel

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)

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 your self-assessment and all eLearning modules at your earliest convenience.

<#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.

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.

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 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. You may also add custom text to the reminder to appear above the standard text.

When finished, click Save As Complete.

MAX

Client Name Axion Toys Session Name SOCIAL STYLE IPEV eLearning (1041) Due Date 11 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 Learner for the Rater.

Save as Partially Complete Save as Complete Cancel

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

REMINDER DELIVERY Remind Learners 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.

Sample Reminder for Learners

From : TRACOM Learning admin@maxproddata1.tracom.com

Standard Subject Line: **Reminder: Time-sensitive actions pending at TRACOM Learning**

<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: <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 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 Complete Cancel

REPORT NORM

Norm

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

<p>Materials Available to Learners</p> <p> <input checked="" type="radio"/> Match Learner Report Availability <input type="radio"/> On a Specific Date: <input type="text"/> (example: 31 DEC 2010) </p>	<p>Universal Materials Available to Learners</p> <p> <input type="checkbox"/> Improving Personal Effectiveness With Versatility Participant Package <input type="button" value="view"/> <input type="checkbox"/> Achieving Higher Versatility Resource Guide <input type="button" value="view"/> </p>
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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 Due 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 Due 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	Additional Reports: Pre-Session	Late Reports: Post-Session
	Activation Date -> Report Date	Report Date + 1 -> Start Date - 1	Start Date -> End Date + 30
Who will generate reports?	Unknown - Activation Date <input type="text" value="System Will Auto Generate"/>	Activation Date + 1 - 19 Sep 2021 <input type="text" value="System Will Auto Generate"/>	20 Sep 2021 - 20 Oct 2021 <input type="text" value="System Will Auto Generate"/>
When should the reports be generated?	<input type="text" value="Immediately"/>	<input type="text" value="Immediately"/>	<input type="text" value="Immediately"/>
Who should be notified when reports are generated?	<input checked="" type="checkbox"/> Admin <input type="checkbox"/> Learner <input checked="" type="checkbox"/> Facilitator Frank Facilitator	<input checked="" type="checkbox"/> Admin <input type="checkbox"/> Learner <input type="checkbox"/> Facilitator Frank Facilitator	<input checked="" type="checkbox"/> Admin <input type="checkbox"/> Learner <input type="checkbox"/> 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.

MAX

Client Name Axtion Toys Session Name SOCIAL STYLE IPEV eLearning (1041) Due Date 11 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 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

* 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.

MAX

Client Name Axtion Toys Session Name SOCIAL STYLE IPEV eLearning (1041) Due Date 11 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
4000 (SOCIAL STYLE v3>> Universal>> eLearning >> Improving Personal Effectiveness with Versatility v3 On Demand - w/Self-Perception 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, 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.

MAX

Client Name Axtion Toys Session Name SOCIAL STYLE IPEV eLearning (1041) Due Date 11 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	* First Name	* Last Name	Localized First Name	Localized Last Name
learner25@axtiontoys.com	Jack	Shen		
* Email Language	* Report Language	* Report Norm	Learner Reminders Enabled	
English (US)	English (US)	Global	Yes	

[Add Learner Now](#)

0 New Learners Added 0 Total Learners

NEW LEARNERS ADDED

Name	Email Language	Report Language	Report Norm	Report Status
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* Required Field

Click Add via Excel Upload to use the [Learner Enrollment Form](#) provided by TRACOM to upload multiple learners at the same time.

MAX
 Client Name: Axtion Toys Session Name: SOCIAL STYLE IPEV eLearning (1041) Due Date: 11 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
 3997 (SOCIAL STYLE v3>> Universal>> eLearning >> Improving Personal Effectiveness with Versatility v3 On Demand - w/Self-Perception Profile)

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

[Select All](#) Total Selected: 0

A	B	C
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*
learner30@axtiontoys.com	Sidney	Jones
learner35@axtiontoys.com	Aidan	Rowe

Learner enrollment_02 SEP | [Save](#)

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.

MAX Client Name Axtion Toys Session Name SOCIAL STYLE IPEV eLearning (1041) Due Date 11 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.

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. No file chosen

Step 4 Select the UPLOAD button to import your Learners.

MAX Client Name Axtion Toys Session Name SOCIAL STYLE IPEV eLearning (1041) Due Date 11 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.

NEW LEARNERS				
Email Address	Name	Email Language	Report Language	Report Norm
learner30@axtiontoys.com	Sidney Jones	English (US)	English (US)	Global
* The name you entered (Sydney Jones) was changed due to a previous registration.				
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).
- Learners may be added, removed, or moved from this screen.



Client Name Axtion Toys **Session Name** SOCIAL STYLE IPEV eLearning (1041) **Due Date** 11 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
3997 (SOCIAL STYLE v3>> Universal>> eLearning >> Improving Personal Effectiveness with Versatility v3 On Demand – w/Self-Perception Profile)

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

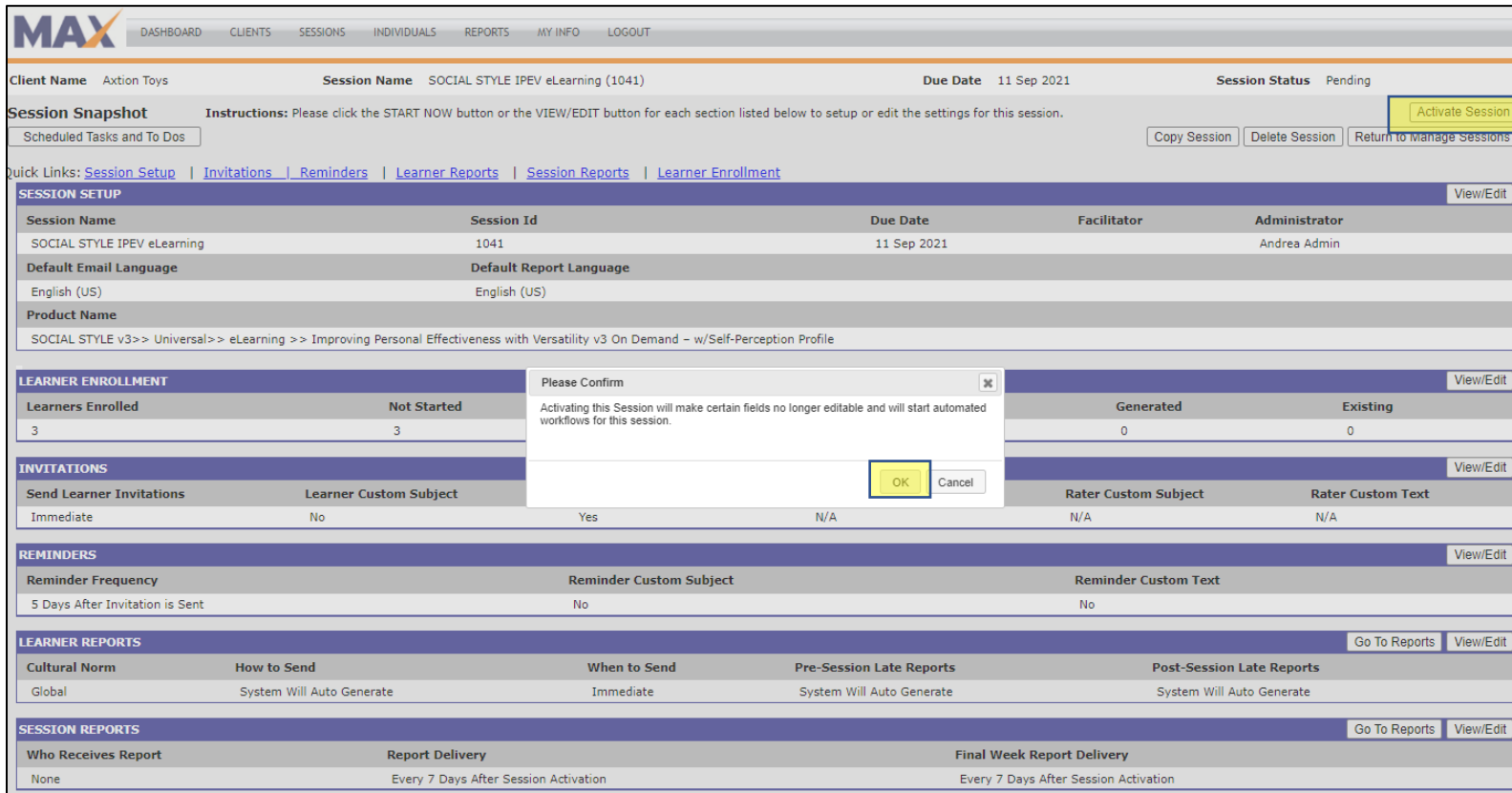
[Select All](#) **Total Selected: 0**

Select	First Name	Last Name	Email Address	Report Norm	Email Language / Report Language	Data Status	Report Status
<input type="checkbox"/>	Sidney	Jones	learner30@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
<input type="checkbox"/>	Jack	Shen	learner25@axtiontoys.com	Global	English (US) English (US)	Not Started	Sample

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.



The screenshot shows the MAX eLearning interface with the session status set to 'Pending'. A yellow box highlights the 'Activate Session' button. A dialog box titled 'Please Confirm' is open, asking for confirmation to activate the session. The dialog box contains the following text: 'Activating this Session will make certain fields no longer editable and will start automated workflows for this session.' The dialog box has 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a yellow box.

Client Name: Axton Toys
Session Name: SOCIAL STYLE IPEV eLearning (1041)
Due Date: 11 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 IPEV eLearning	1041	11 Sep 2021		Andrea Admin
Default Email Language	Default Report Language			
English (US)	English (US)			
Product Name	SOCIAL STYLE v3>> Universal>> eLearning >> Improving Personal Effectiveness with Versatility v3 On Demand - w/Self-Perception 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	N/A	N/A

REMINDERS View/Edit

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

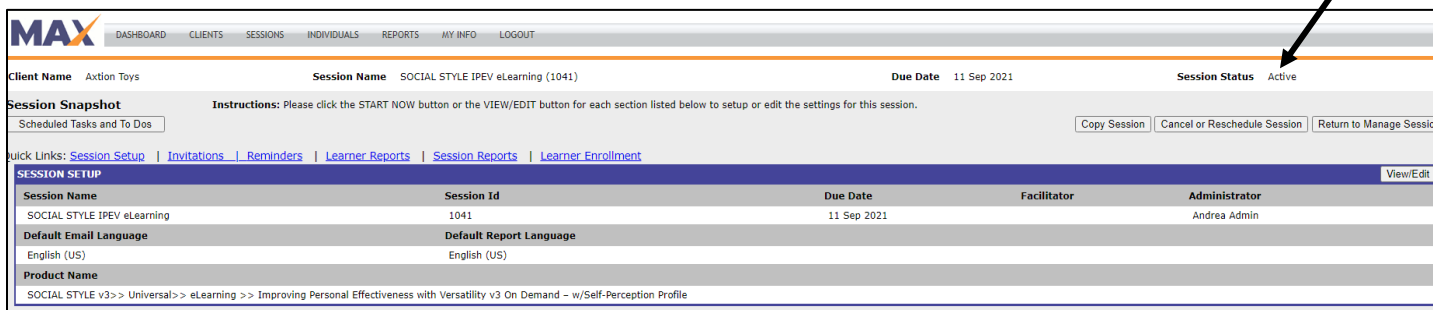
LEARNER REPORTS Go To Reports View/Edit

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

SESSION REPORTS Go To Reports View/Edit

Who Receives Report	Report Delivery	Final Week Report Delivery
None	Every 7 Days After Session Activation	Every 7 Days After Session Activation

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



The screenshot shows the MAX eLearning interface with the session status updated to 'Active'. An arrow points to the 'Active' status. The 'Activate Session' button is no longer visible, and the 'Cancel or Reschedule Session' button is now present.

Client Name: Axton Toys
Session Name: SOCIAL STYLE IPEV eLearning (1041)
Due Date: 11 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 IPEV eLearning	1041	11 Sep 2021		Andrea Admin
Default Email Language	Default Report Language			
English (US)	English (US)			
Product Name	SOCIAL STYLE v3>> Universal>> eLearning >> Improving Personal Effectiveness with Versatility v3 On Demand - w/Self-Perception Profile			

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:

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

Complete	Description	Date Due	Status
<input checked="" type="checkbox"/>	Complete session setup	12 Aug 2021	Completed
<input checked="" type="checkbox"/>	Activate session for 11 Sep 2021	11 Sep 2021	Completed

Description	Run Date	Status
Reminders Sent	21 Aug 2021	Scheduled
Session Status Report Sent	23 Aug 2021	Scheduled
Reminders Sent	26 Aug 2021	Scheduled
Session Status Report Sent	30 Aug 2021	Scheduled
Reminders Sent	31 Aug 2021	Scheduled
Reminders Sent	05 Sep 2021	Scheduled
Session Status Report Sent Final Week	06 Sep 2021	Scheduled
Reminders Sent	10 Sep 2021	Scheduled

Description	Run Date	Count
Learner Invitations Sent	16 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 Action Toys Session Name SOCIAL STYLE IPEV eLearning (1041) Due Date 11 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 IPEV eLearning	1041	11 Sep 2021		Andrea Admin
Default Email Language	Default Report Language			
English (US)	English (US)			
Product Name	SOCIAL STYLE v3>> Universal>> eLearning >> Improving Personal Effectiveness with Versatility v3 On Demand - w/Self-Perception 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	N/A	N/A	N/A

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	Immediate	System Will Auto Generate	System Will Auto Generate

SESSION REPORTS [Go To Reports](#) [View/Edit](#)

Who Receives Report	Report Delivery	Final Week Report Delivery
None	Every 7 Days After Session Activation	Every 7 Days After Session Activation

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

MAX

Client Name: Axion Toys Session Name: SOCIAL STYLE IPEV eLearning (1041) Due Date: 11 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"/>	Aidan	Rowe	Sample	Not Started	No		English (US)
<input type="checkbox"/>	Jack	Shen	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)

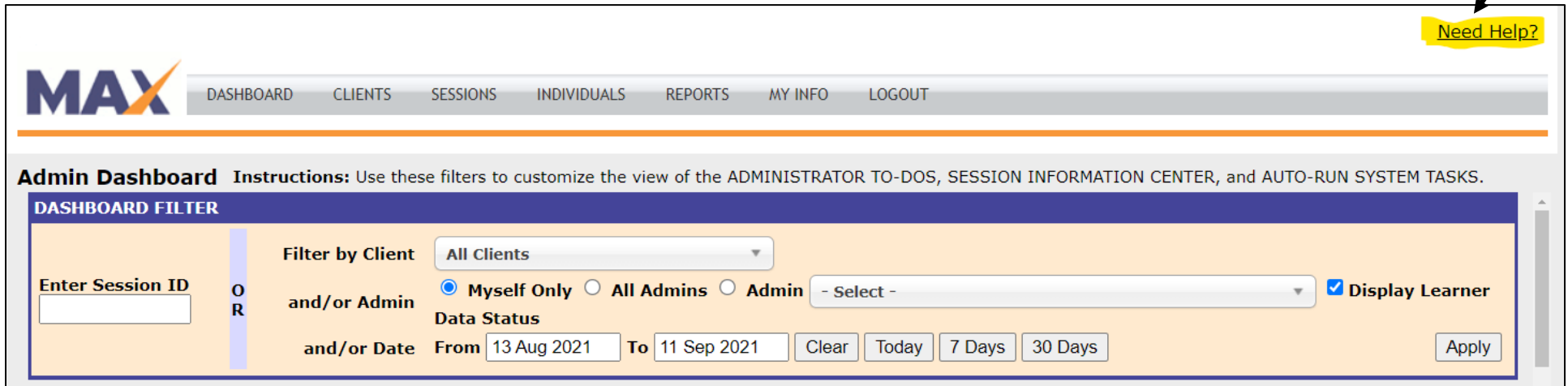
Download Learner Report(s) (PDF)
 Download Composite Report (PDF)
 Download Status Report (PDF)
 Download Learner Status (Excel)

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.

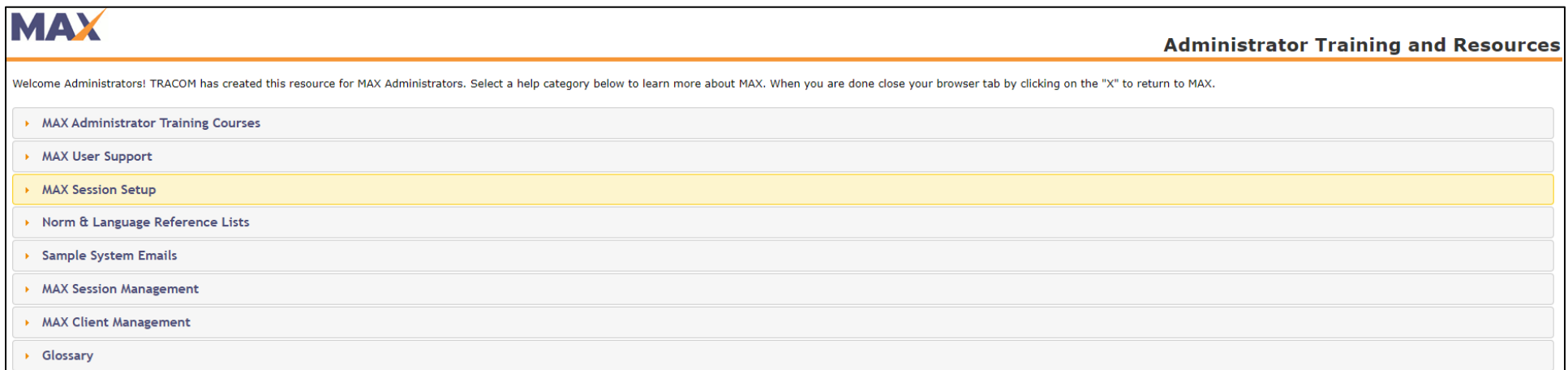
DASHBOARD FILTER

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