# TRACOM MAX GLOSSARY

| Term | Definition |
|---|---|
| Activate Session | Action taken when all required session setup is complete on the Session Snapshot screen. Select the Activate Session button to initiate automated workflows (e.g., send Learner and rater invitations)NOTE: activation will make certain fields no longer editable. |
| Admin Dashboard | A MAX screen that is displayed immediately after login that serves asthe administrator's control panel. Using filters, the administrator can display as much system information as desired. Sections on this screen include Session Information, Admin To Do's, and Auto-Run System Tasks. |
| Admin To-Do's (ATDs) | Task list automatically generated by the system and displayed on the Admin Dashboard for all sessions assigned to an administrator, and on the Session Snapshot Scheduled Tasks/To Dos screen for a specific session to inform administrators of any activities they need todo at any given time. Examples of ATDs include "Complete session setup" and "Activate session by (specific date)." The tasks are displayed on the Admin Dashboard for all sessions for which the administrator has the rights to view and on the Session Snapshot Scheduled Tasks/To Dos screen for a specific session. These tasks reflect the options selected by the administrator when the session was set up. Once the system automatically completes an ATD, the Task Status is changed from *Open* to *Completed,* and it is removed from the Admin To Do's section. Note: There are a few ATD's that willnot be automatically updated and these will need to be manually checked as completed. |
| ART Run Date | The date an Auto-Run System Task (ART) will be executed by the system. Some ART descriptions are followed by a number in parenthesis. This number indicates how many items were executed for the task. |
| Automated workflows | Tasks performed automatically by the MAX system once a session is activated by the administrator. See Auto-Run System Tasks. |
| Auto Reminders | Reminder emails automatically sent **only** to Learners and raters whohave not yet completed their To Do List tasks in TRACOM Learning. Reminders are sent according to the frequency set by the administrator during session setup. |
| Auto-Run System Tasks (ARTs) | Tasks automatically generated by the system when a session is activated to control session workflows. Examples of ARTs include "System Send Status Report" and "System Create Initial Reports." The tasks are displayed on the Admin Dashboard for all sessions forwhich the administrator has the rights to view and on the Session Snapshot Scheduled Tasks/To Dos screen for a specific session. These tasks reflect the options selected by the administrator when the session was set up. Once the system automatically completes anART, the ART's Task Status is changed from *Scheduled to Completed*. |
| Auto-Run System Task (ART) Status | ARTs that have not yet been executed have the status of *Scheduled*.Once ARTs have been executed, the status changes to *Completed*. |
| Client | Organization doing business with TRACOM and using MAX to administer learning events. Also referred to as *company*. Organizational designation under which learning events in MAX are grouped. A client can be an entire company or organization, or a subdivision of a company such as a division or department. |
| Client administrator | Also known as a TRACOM Client Administrator (TCA). Persons assigned/ designated by their company and set up by TRACOM to perform administrative tasks in MAX. Tasks involve setting up sessions for TRACOM products, scheduling and sending Learner andrater invitations and reminders, generating and delivering Learner Reports, Session Status Reports, and Composite Reports, and managing sessions. Tasks TCAs can perform depend on the rights they are given. There can be more than one TCA per client, but onlyone TCA assigned to a session. |

| Term | Definition |
|---|---|
| Client Settings | A portion of the Client Set Up screen where information is displayed in three groups, including Client Information, Contact Information andFunction Settings. |
| Client Snapshot screen | MAX screen that provides a summary of all information entered for aclient. Sections on this screen include client settings, authorized products, product pools, client administrators, and session delivery locations. |
| Session Composite Report | Report generated by MAX which aggregates Learner profile positiondata for a given session. Typically used by the session facilitator to quickly review the different Learner results in a session. |
| Copy Session | Time-saving feature available on the Session Snapshot screen that allows administrators to create a new session by copying an existingsession using the same TRACOM product and the same or similar session settings. |
| Cultural Norm | It is important to understand cultural differences and how they can impact perceptions of Style andVersatility. Norms provide a mechanism for people to compare themselves with one another. All of TRACOM's profiles use norms for accuracy. TRACOM has developed a variety of global, regional, and country norms to reflect the culture and behavioral standards of individual countries and geographic regions. In doing so, people receive profiles that are most meaningful for them. |
| Dashboard filter | A set of fields at the top of the Admin Dashboard screen that, when completed, allows the administrator to search for specific Sessions and session-related information for which they have administrationrights. |
| Due Date (Session) | For eLearning sessions, the due date is the date by which tasks are requested to be completed.  Learners still have 30 days after the Due Date to complete tasks. |
| Determine the Profile position | Survey data gathered from the Learner and raters are processed before the Learner Profile itself can be created. |
| Excel import | Learners can be added to a session via an Excel upload spreadsheet to efficiently enroll multiple Learners in a session at the same time. |
| Facilitator | A specified instructor for a session. Adding the facilitator information to a session in MAX helps to automate some communication to the facilitator(s) and allows facilitators the ability to log into MAX and review, download, or print Session Status and Composite Reportsand Learner Profiles in preparation for delivery. |
| Hyperlink | One or more underlined words on a screen that, when selected, allow the user to go to another location on the same screen, or a differentscreen entirely. |
| Initial Report Period | Report delivery period that ranges from the date the session is activated to the date the Learner Reports are initially generated. |
| Late Report Period | See Post Session period. |
| Learner | Person associated with a client that participates in a TRACOM learning event. The Learner is the person who is enrolled in a session. |
| Learner invitation | Initial email message sent to a Learner enrolled in a session. The invitation instructs the Learner to register for the session and, subsequently, access a To-Do List to complete a self-assessmentsurvey and, if multi-rater, invite raters to complete surveys on their behalf. Learner Invitations can be sent automatically through MAX recommended), or administrators may disable Learner Invitations and send theinvitations outside of the MAX system. |

| Term | Definition |
|---|---|
| Learner Data Status | Learner's status related to data collection for a Session. Statuses include Not Started, Started, Sufficient, Generated, and Existing. |
| Learner Profile Report | A report that is generated after the Learners and/or raters have provided sufficient feedback via one or more survey(s), depending on the product. |
| Localized Name | The localized names are optional fields for the individual's name in non-western/non-Latin characters.<br>Example: Localized First name - お買<br>Localized Last name - 回購 |
| Manual entry option (for LearnerEnrollment) | Method by which Learners are added individually to a session via the manual entry option on the Add Learners screen. |
| Master Rights | An administrator with Master Rights has access to all other administrators within their company at their same level and below. If an administrator does not have Master Rights, they have access only to administrators within their company who are below them. |
| Parent client | The MAX client structure is based on a hierarchical data model, which means the data is organized into a tree-like structure. The structure allows the system to represent information using client/ sub-client relationships: a company can have one main parent client with many sub-clients. |
| Post-Session Period | Report delivery period that ranges from the session start date to 30days after the session start date. Late Reports are those generated during this timeframe. |
| Pre-Session Period | Report delivery period that ranges from the day after the initial Learner Report generation date to the day before the session startdate. |
| Rater | A person invited by a Learner to provide feedback on that Learner using a TRACOM assessment. |
| Rater invitation | Email invitation sent automatically by the system to any raters invited by Learners. Rater invitations include a standard message and may include custom messages from administrators and Learners. |
| Rater Data Status | The state of a Rater related to data collection for a session. Rater data statuses include Not Started, Started, and Completed. |
| Reminders | Email messages sent to Learners and Raters who have not yet completed their surveys. Reminders can be automatically or manually generated. |
| Report Language | Primary language that will be used for each Learner Profile. |
| Report Norm | It is important to understand cultural differences and how they can impact perceptionsof Style and Versatility. Norms, or normative comparisons as they are technically called, provide a mechanism for people to compare themselves with one another. All of TRACOM's Profiles use norms for accuracy. TRACOM has developed a variety of global, regional, and country norms to reflect the culture and behavioral standards of individual countries and geographic regions. In doing so, people receive Profiles that are most meaningful for them. |
| Report Status | Report status depends on the number of assessments completed for a Learner and administrator decisions regarding report generation and delivery. Statuses include Sample, Available, Generated, and Existing. |
| Self-assessment | Completion of a survey by a Learner evaluating the Learner's own behavior. |

| Term | Definition |
|---|---|
| Session | A collective term that represents a learning event for one or more Learners. Sessions are comprised of many options and settings used to properly conduct and manage the session and create a variety ofreports. |
| Session Delivery Location | Session Delivery Location is an optional section, of the SessionSnapshot screen designed to specify the location details of where thetraining session will take place. |
| Session ID | A unique code assigned to a session automatically by MAX. (See also *session*.) Useful when performing a search for a specific session. |
| Session Snapshot screen | Provides a summary of information for a specific session includingsetup, invitations, reminders, Learner reports, session reports and Learner enrollment. |
| Session Status Report | Used by the session administrator, facilitator(s), or others to get a quick overview of how many Learners are in a session, and how manyof the Learner and rater surveys are not started, started, have sufficient data, are completed, or were existing previous to this session. |
| Session Status | The administrative state of a session. Statuses are: Active, Pending, Reschedule Pending, Cancelled, Completed, or Closed.<br>• Active Session status: Indicates that the session has been activated; automated workflows and other system tasks are currently running.<br>• Pending Session Status: Indicates that a session has been savedbut not yet activated.<br>• Reschedule Pending Session status: Indicates that a sessionwas previously Active but is now waiting to be rescheduled. A newStart Date for the session has not yet been determined.<br>• Cancelled Session Status: Indicates the session has been terminated and will not be held. Cancelled Sessions do not appear on the Admin Dashboard screen. To search for sessionsin this state, go to the **Manage Sessions** screen.<br>• Completed Session Status: Indicates that the Session Start Date has passed but the session is not yet Closed. Learners and Raters can still complete surveys during this time.<br>• Closed Session Status: Indicates that the Post-Session Period has passed and no additional tasks can be completed. Closed sessions do not appear on the Admin Dashboard screen. To search for sessions in this state, go to the **Manage Sessions** screen. |
| Session Start Date | The first day of a learning event. |
| Session Setup | A screen used to enter basic information about a session. Also refersto the process of entering setup information. Session Setup is one section on the Session Snapshot screen. |
| Sub-client | The MAX client structure is based on a hierarchical data model, which means the data is organized into a tree-like structure. The structure allows the system to represent information using parent/child relationships: each parent can have many children but each child only has one parent (also known as a 1: many ratios). In MAX, a Company can have one Parent Client and many sub (child)clients. |
| Survey | The questions used to collect the data for an assessment. |

| Term | Definition |
|---|---|
| TRACOM Client Administrator(TCA) | Person assigned/designated by their company and set up by TRACOM to perform administrative tasks on MAX. Tasks involve setting up sessions for TRACOM products, scheduling and sending Learner and rater invitations and reminders, generating and deliveringLearner reports, Session Status reports, and Composite reports, andmanaging sessions. Tasks TCAs can perform depend on the rights they are given. There can be more than one TCA per client, but only one TCA per session. |
| MAX registration | Before an administrator can enter or edit session information in MAX,they must complete the MAX Registration screen by supplying basic information about themselves such as first name, last name, and security information. When a new administrator is created in the MAX system, the administrator will be sent an email that includes a link to the MAX Registration screen. |
| Verify Identity | Option used when the administrator wishes to verify that an individual contacting them is who they say they are. This process protects the privacy of individuals in the MAX system through unique security question responses from the Learner. |