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 as the 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 to do 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 setup. 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 will not 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.
ATDs	Administrator tasks automatically generated by the system to inform the administrator of any activities they need to complete. Also known as Admin To Do's.
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 who have not yet completed their surveys. 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 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 setup. Once the system automatically completes an ART, 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.

Term	Definition
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 on MAX. Tasks involve setting up sessions for TRACOM products, scheduling and sending learner and rater 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 only one TCA assigned to a session.
Client Settings	A portion of the Client Set Up screen where information is displayed in three groups, including Client Information, Contact Information and Function Settings.
Client Snapshot screen	MAX screen that provides a summary of all information entered for a client. Sections on this screen include client settings, authorized products, product pools, client administrators, and session delivery locations.
Company	Organization doing business with TRACOM and using MAX to administer learning events. A company may include more than one client in MAX. See also *client*.
Session Composite Report	Report generated by MAX which aggregates learner profile position data for a given session. Typically used by the session facilitator to quickly review the different SOCIAL STYLE™ positions and Versatility scores of all of learners 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 existing session using the same TRACOM product and the same or similar session settings.
Cultural Norm	For clients with learners outside the U.S., it is important to understand cultural differences and how they can impact perceptions of Style and Versatility. Norms provide a mechanism for people to compare themselves with one another. All of TRACOM's multi-rater profiles use norms for accuracy. In addition to our standard North American norm, TRACOM has developed a variety of international 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. TRACOM's research shows that Style is a global concept; it exists across nationalities. However, every culture is unique, and this is sometimes reflected in the way Style and Versatility are displayed. For this reason, it is important for people to use norms that reflect their specific cultures.
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 administration rights.
End Date (Session)	The last day of a learning event. Inside the MAX system, the End Date is the last day that learners can be added to a session. By default, this is set to 30 days past the Session Start Date.
End Time (Session)	The Start Time and End Time of the session to be chosen from dropdown lists. NOTE: times are noted in both U.S. and military time/continental time, listed in 15 minute increments. Start Time selections range from 06:00AM (0600) to 03:45PM (1545), and End Time selections range from 04:00PM (1600) to 12:15AM (0015)
EXCEL import	Learners can be added to a session via a MS-EXCEL spreadsheet upload.

Term	**Definition**
Facilitator	A specified instructor for a session (NOTE: there may be unlimited instructors setup 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 Reports and Learner Profiles in preparation for delivery.
Determine the Profile position	Survey data gathered from the learner and raters are processed before the Learner Report itself can be created. The Profile position can be determined once at least 3 raters have provided feedback via the survey for a learner. Optionally, the learner can complete his/her own self-survey as well.
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 different screen 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 receives feedback from others.
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-assessment survey and/or invite raters to complete surveys on their behalf. Learner Invitations can be sent automatically through MAX, or administrators may disable Learner Invitations and send the invitations outside of the MAX system.
Learner Data Status	Learner's status related to data collection for a Session. Statuses include Not started, Started, Sufficient, Scored, and Existing.
Learner Profile Report	A report that is generated after the learners and/or raters has provided sufficient feedback via one or more survey(s), depending on the product.
Learner status	Informs the administrator as to whether or not the learner has completed the registration process in MAX. Statuses are either Not Registered or Registered.
Localized Name	The localized names are optional fields for the individual's name in their local language's alphabet, if their local language uses non-western/non-Latin characters. Example: Localized First name - お買 Localized Last name - 回購
Manual entry option (for Learner Enrollment)	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 parent/child relationships: each parent can have many children but each child only has one parent (also known as a one-to-many ratio). In MAX, a company can have one parent client and many sub (child) clients.
Post-Session Period	Report delivery period that ranges from the session start date to 30 days after the session start date. Late Reports are those generated during this timeframe.

Term	Definition
Pre-Session Period	Report delivery period that ranges from the day after the initial Learner Report generation date to the day before the session start date.
Rater	A person invited by a Learner to provide feedback on that Learner using a TRACOM assessment instrument.
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. Statuses include Not started, Started, and Sufficient data.
Rater Status	Informs the administrator as to whether or not the rater has completed the registration process in MAX. Statuses are either Not Registered or Registered. This status is located on the Rater Details page.
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 Report.
Report Norm	For clients with Learners outside the U.S., it is important to understand cultural differences and how they can impact perceptions of 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 multi-rater Profiles use norms for accuracy. In addition to our standard North American norm, TRACOM has developed a variety of international 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. TRACOM's research shows that Style is a global concept; it exists across nationalities. However, every culture is unique, and this is sometimes reflected in the way Style and Versatility are displayed. For this reason it is important for people to use norms that reflect their specific cultures. The Report Norm is the unique norm used to create a Learner Report.
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, Delivered, and Existing.
Self-assessment	Completion of a survey by a learner evaluating the learner's own behavior.
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 of reports.
Session Delivery Location	Session Delivery Location is an optional section, of the of the Session Snapshot screen designed to specify the location details of where the training 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 including setup, invitations, reminders, learner reports, session reports and learner enrollment.

Term	Definition
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 many of 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. Possible statuses include: Active, Pending, Reschedule Pending, Cancelled, Completed, and Closed. • Active Session status: Indicates that the session has been activated; automated workflows and other system tasks are currently running. • Pending Session Status: Indicates that a session has been saved but not yet activated. • Reschedule Pending Session status: Indicates that a session was previously Active but has now been rescheduled. A new Start Date for the session has not yet been determined. • 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 sessions in this state, go to the **Manage Sessions** screen. • Completed Session Status: Indicates that the Session End Date has passed but there are still remaining workflows to be processed. • Closed Session Status: Indicates that the Session End Date has passed and all workflows are now complete. Closed sessions do not appear on the Admin Dashboard screen. To search for sessions in this state, go to the **Manage Sessions** screen.
Security Rights ID	A unique security number assigned automatically to every administrator in the system.
Start Date (Session)	The first day of a learning event.
Session Setup	A screen used to enter basic information about a session. Also refers to the process of entering setup information. Session Setup is one section on the Session Snapshot screen.
Start Time (Session)	The Start Time and End Time of the session to be chosen from dropdown lists. NOTE: times are noted in both U.S. and military time, listed in 15 minute increments. Start Time selections range from 06:00AM (0600) to 03:45PM (1545), and End Time selections range from 04:00PM (1600) to 12:15AM (0015).
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.
Sub-admin	Administrator that has a parent administrator above them.
Survey	The questions used to collect the data for an assessment.
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 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 only one TCA per session.

Term	Definition
TRACOM Client Relations	Staff within TRACOM responsible for setting up new clients and administrators in MAX and for supporting clients with any and all aspects of session setup, administration, delivery and tier 1 support.
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, phone number, address information, 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.