



Manager's Reporting

Quick Start Guide



Welcome to XCEL Solutions! This quick start guide is to help new managers successfully oversee and navigate the reporting processes available at XCEL. Here, we'll walk you through the essential steps to make the most of XCEL's robust reporting features and ensure your candidates are on the right track to success.

■ Accessing Your Admin Portal

Your Admin Portal will gain you access to a comprehensive dashboard where you can view your candidates and their progress, manage reporting tools, and much more.

1. Log into your XCEL Admin Portal by navigating to your Partner Site and then clicking **Log in** at the top right corner of the page. Your login credentials have been sent to you via email by your Customer Success Manager upon account creation.
2. Once logged in to your Partner Site, click **My Training** at the top right corner of the page. This will bring you to the Student Portal.
3. For users who have Admin Portal access, an **Admin Portal link** will appear in the top navigation bar. Click on **Admin Portal** to enter the management dashboard.
4. Familiarize yourself with the various features in the Admin Portal so you can effectively manage your candidates' progress and performance. On the left-hand side of the dashboard, you will find sections for **Users** and **Reports**:



Users

This area allows you to view a list of your associated recruits. Features here include the ability to search for users, filter them, send emails to all users, or export a report detailing users and their progress. Additionally, the 3-dots Quick Links feature enables you to send an email, view a user's profile, or view their transcript individually. To view a user's study progress, click View Transcript. Here you'll be able to view if they started or completed a lesson, the time spent in a lesson, exam scores, and more.



Reports

In this section, you can create, view, and share reports. You will have access to two Report Templates to start with, which you can customize via our Report Viewer. This tool enables you to sort and filter data so you can focus on the metrics most important to you to monitor your candidates' progress efficiently. Furthermore, you have the option to save and schedule reports, allowing them to run automatically and receive via email according to your schedule.

Reading Your Daily Progress Report Emails

An automatic email of our Daily Progress Report will hit your inbox each morning before 9:00 AM EST. This report helps you effectively manage your pipeline and maximize conversion rates. It breaks down the candidate's progress in each part of our proven 3-Part Training Program:



'Prepared to Pass' Status

Understand your candidates' 'test readiness' with our Prepared to Pass indicators on your Daily Progress Report email. The Prepared to Pass assessment uses our proprietary algorithm to analyze several key factors. A general guideline in how the indicators is established is below:

Prepared to Pass	Completed 100% of Pre-Licensing Course plus: <ul style="list-style-type: none">• 50% of Prep Review and 100% of Exam Simulators, or• 100% of Prep Review and 67% of Exam Simulators
Almost There	Completed 100% of Pre-Licensing Course plus: <ul style="list-style-type: none">• 100% of Prep Review OR 100% of Exam Simulators, or• 50% of Prep Review and 67% of Exam Simulators
Getting Closer	Completed 100% of Pre-Licensing Course
Not Prepared	Completed less than 100% of Pre-Licensing Course

Tips for Success

- Dedicate time to regularly checking your candidate's progress.
- Use your Daily Progress Report's Prepared to Pass indicators to quickly gauge readiness and intervene when needed.
- Encourage candidates to follow our proven 3-Part Training Program for optimum examination outcomes.
- Schedule periodic reports for consistent oversight and proactive management.
- Be sure to share your Enrollment Guide (featuring your Partner URL and code, and instructions on how to get started) to get your candidates registered, and to begin tracking their progress under your Partner Site.



Maximize your success and the success of your candidates with XCEL Solutions. We are proud to partner with you on this path to unparalleled achievement in exam preparation. If you need any assistance, reach out to XCEL Points of Contact:

- **Managers:** clientservices@xcelsolutions.com
- **Students:** support@xcelsolutions.com

