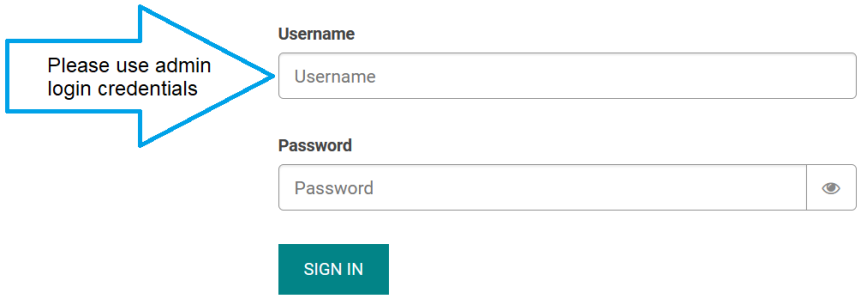
EXCHANGE | ANALYTICS

Branch Administrator Guide

Logging in



To begin, login to your portal (i.e., https://branch.xatraining.com) with the **administrative** credentials we provided. Please note Username and password are case sensitive. Upon initial login, you will immediately be prompted to create a new password. If you have forgotten your username and/or password, please call us at 847-266-7602 or email techsupport@xanalytics.com and we'll send it to you.

Navigating the Menu



To access **Certificates**, click on Certificates icon, and navigate to Users tab:



At the bottom of the page, you can find a filter window and locate the user by first or last name. View the certificate by clicking on Preview icon 👁. You can also download the PDF file for your records.



Reports

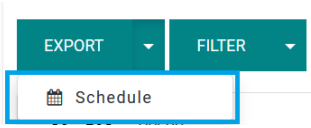
To access **Reports**, click on Reports icon.



Export button allows you to download **general report** that includes information about Users, Training progress, Courses, System log, and much more. Report is in .xlsx format, which allows you to filter and sort data.

User (login)	Course	Status	Completion Date
[redacted]	AML for RMLOs 2026	Completed	10-Nov-2026 11:21
[redacted]	AML for RMLOs 2026	Completed	31-Oct-2026 12:18
[redacted]	AML for RMLOs 2026	Completed	22-Oct-2026 14:44
[redacted]	AML for RMLOs 2026	Completed	03-Nov-2026 09:00
[redacted]	AML for RMLOs 2026	Completed	20-Oct-2026 16:49
[redacted]	AML for RMLOs 2026	Completed	29-Oct-2026 09:50
[redacted]	AML for RMLOs 2026	Completed	28-Oct-2026 16:25

EXCHANGE | ANALYTICS



If you would like the report to be sent to you on a daily/weekly/monthly basis, you can **schedule** it by clicking on drop down arrow next to Export and select a date, frequency, and recipients.



To check user's training progress, click on **Timeline** tab and select desired dates and click on filter to locate the user.



To get access to prior training records and check the progress, click on **Users** tab, find the Filter at the bottom, and locate the user. **Click on the name**, and you will see all prior and current training with its status. You can also download the **certificate** by clicking on the ribbon icon.

If you have any questions, please call us at (847)266-7602 or techsupport@xanalytics.com