BASICS

Download and Email Reports

Click on a question below to skip to the answer.

How do I download reports?

Can I download a report more than once?

How do I download a different type of report? Do I need to create a new project?

How do I email reports to my respondents?

How do I download reports?

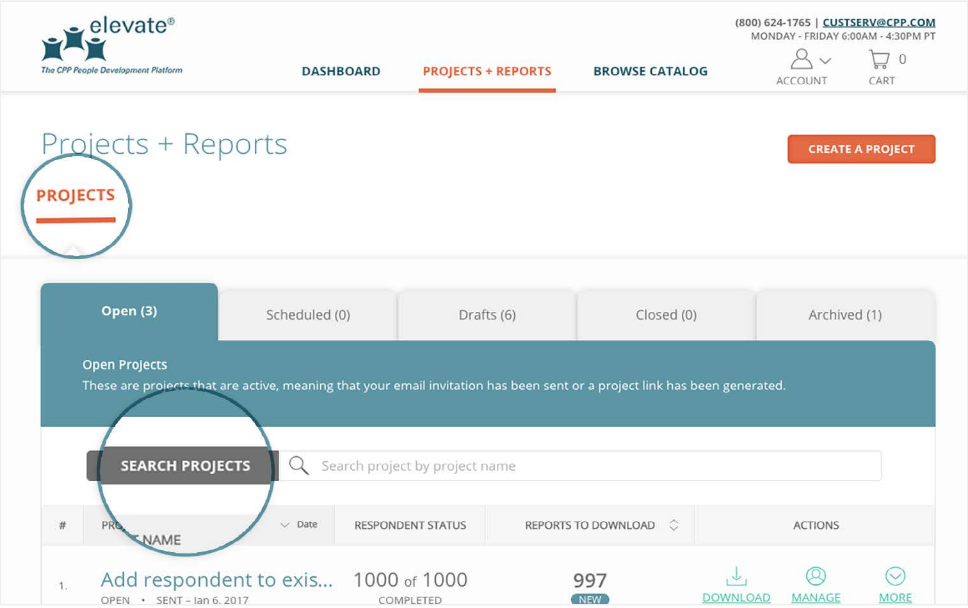
How you download reports will depend on whether you want to download multiple reports at once, or download reports individually.

To download multiple reports at once, follow the steps below.

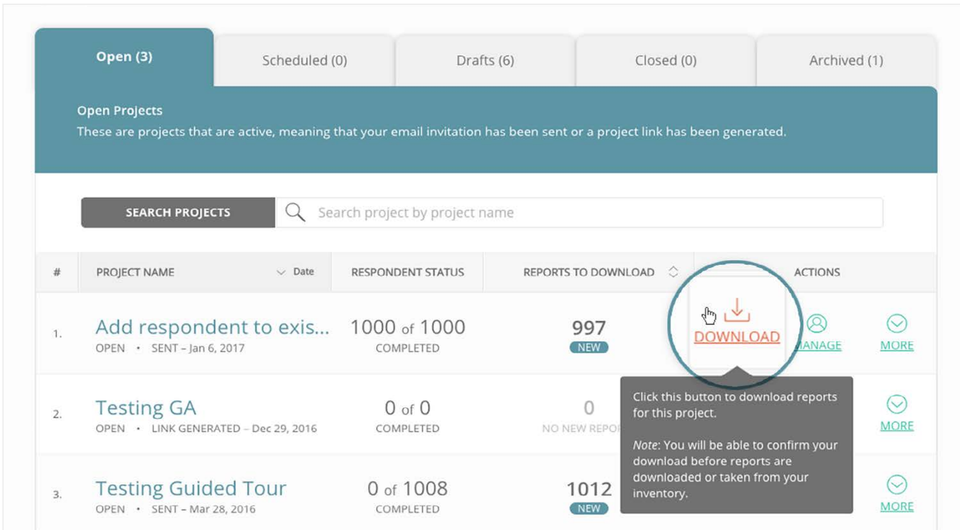
Step 1. Click on the **Projects + Reports** navigation tab.

Step 2. In the **Projects** table, search for the project for which you want to download reports.

> *Note:* The project you are looking for may be in a different tab (e.g. Closed). Click on the tabs in the **Projects** table if you do not see your project in the **Open** tab.

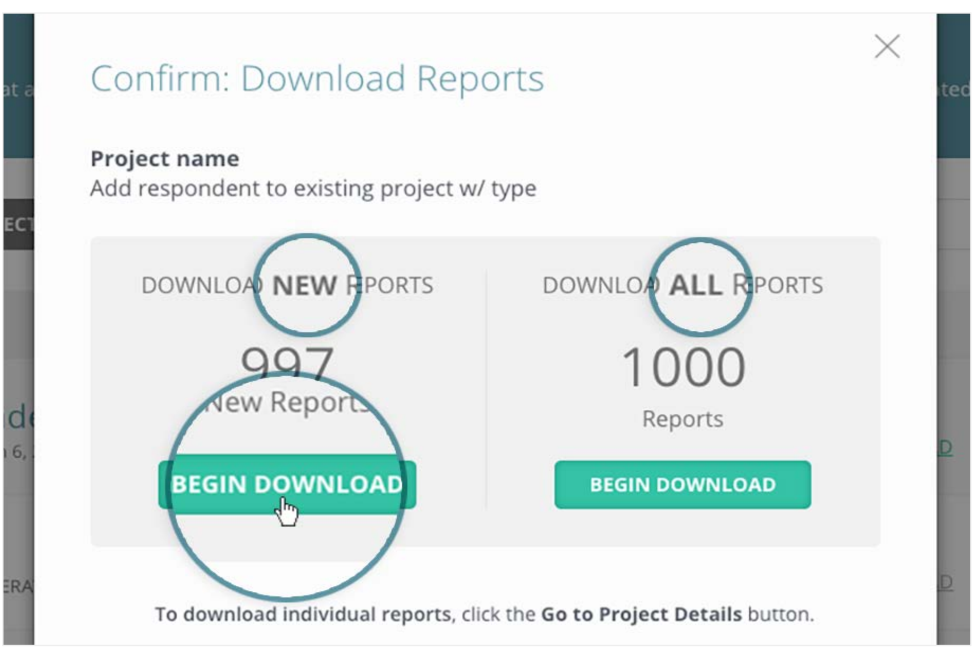


Step 3. Once you've found the project for which you want to download reports, click on the **Download** button in the **Actions** column of the **Projects** table. This will open a **Confirm: Download Reports** pop-up.



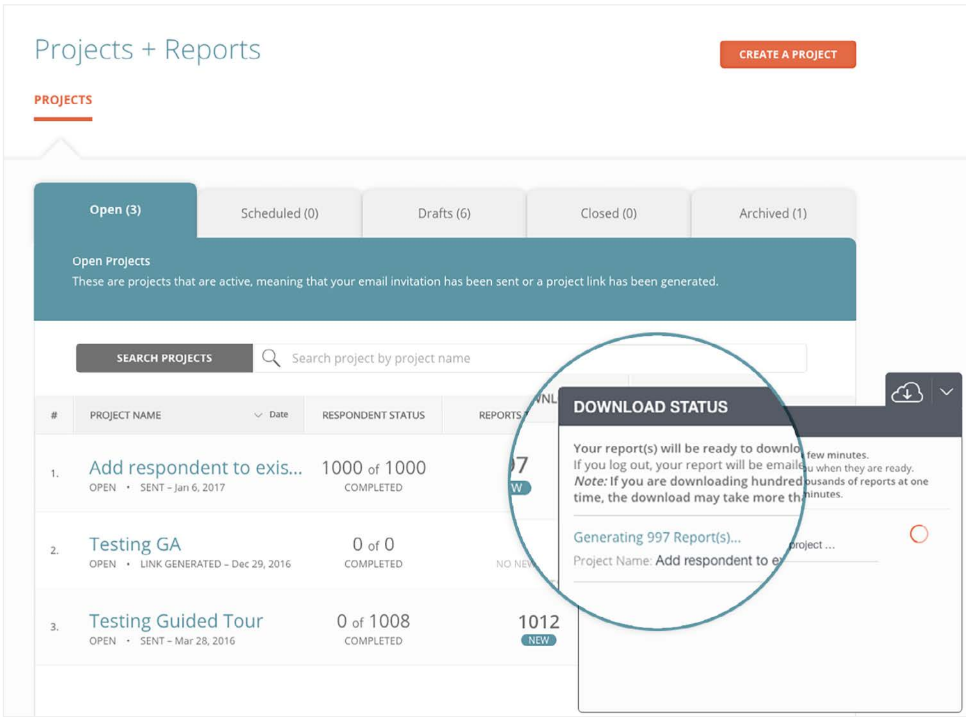
Step 4. From here you have the **choice of downloading only new reports** that you have not yet downloaded, **or all the reports in the project**. Click on **Begin Download** to begin generating your reports for download.

> *Note:* Only **new reports** you have not yet downloaded are taken from your inventory. Re-downloads are always free.



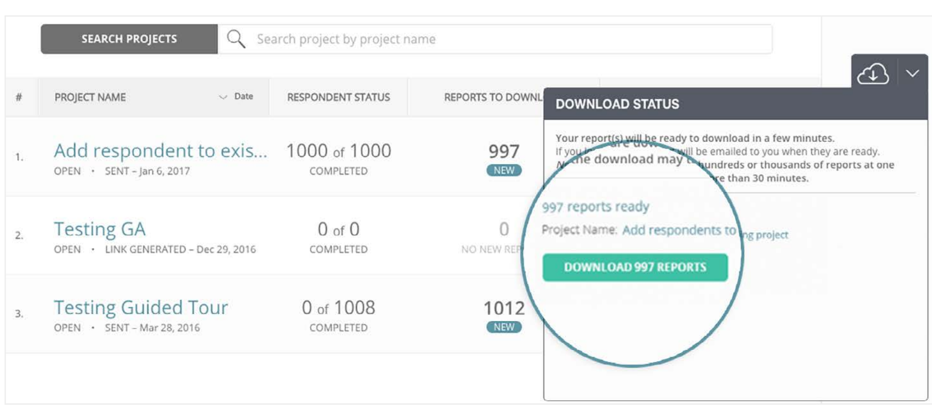
Step 5. When your download begins, a **Download Status** pop-up will appear on your screen. This pop-up lets you know when your reports are ready to download. You can continue using the site while you wait, or choose to log out.

Note: If you log out, your reports will be emailed to you automatically.



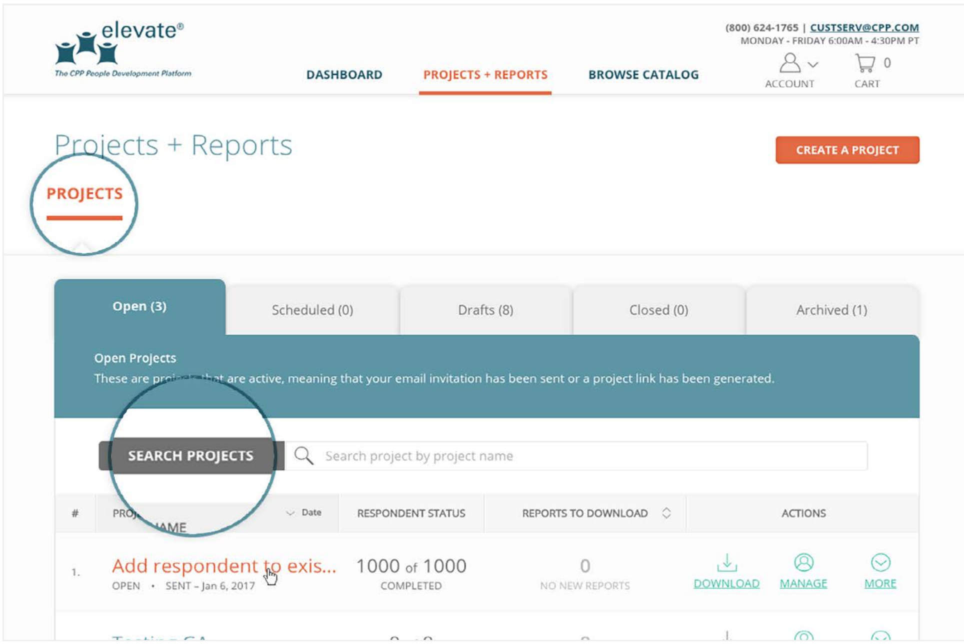
Step 6. When your reports are ready, the **Download Status** pop-up will expand and you will see a **Download Reports** button. Click **Download Reports** to download the reports.

Note: Depending on your browser, the reports will appear at the bottom of your browser window or in a separate pop-up window.

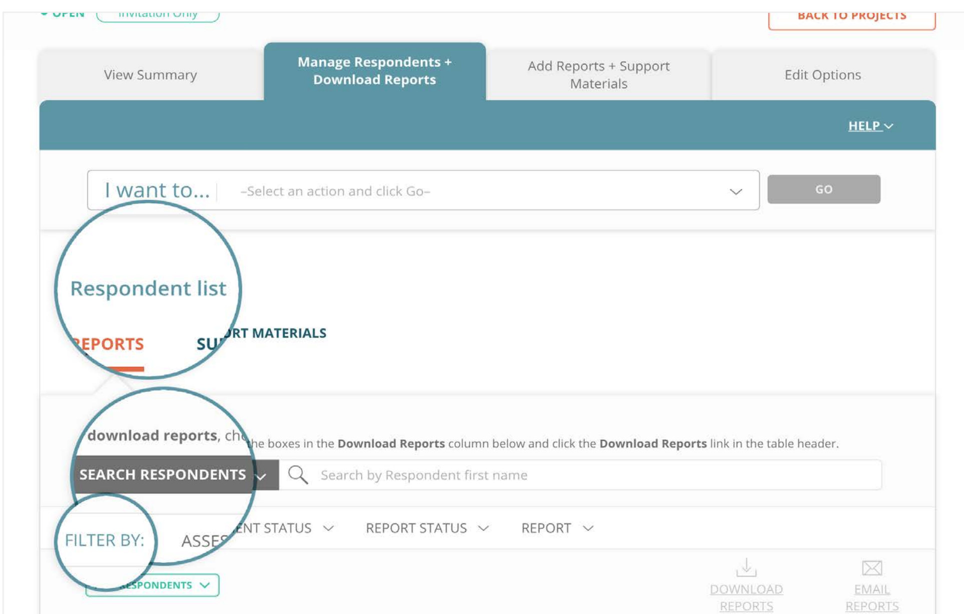


To download reports individually, follow the steps below.

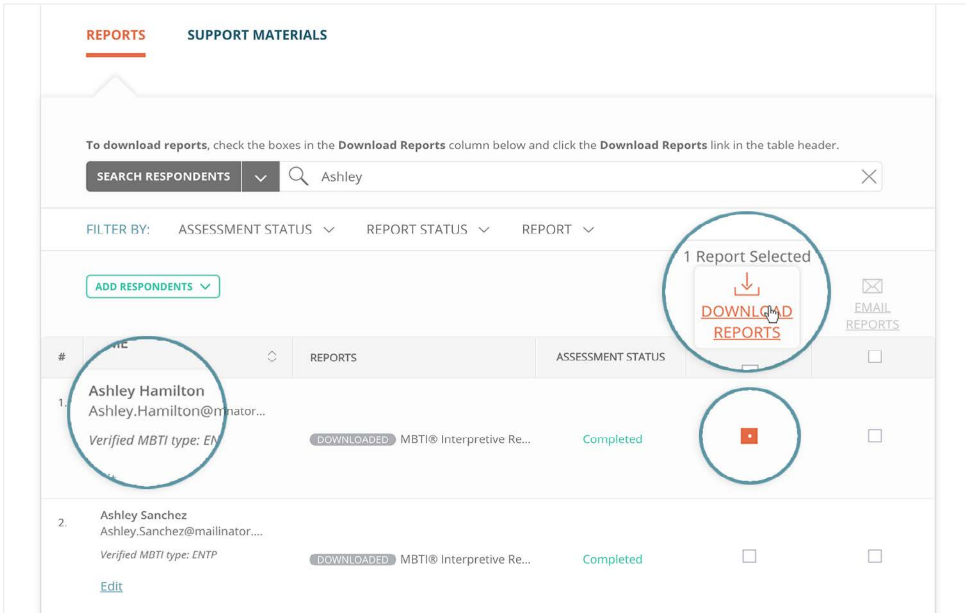
Step 1. In the **Projects** table, search for the project you want to download reports for and click on the **project name**. This will take you to the **Manage Respondents + Download Reports** tab in **Project Details**.



Step 2. From here, scroll down to the **Respondent List**. You can search for the respondent for whom you want to download reports by using the search bar, or filter by assessment status, report status, or report.

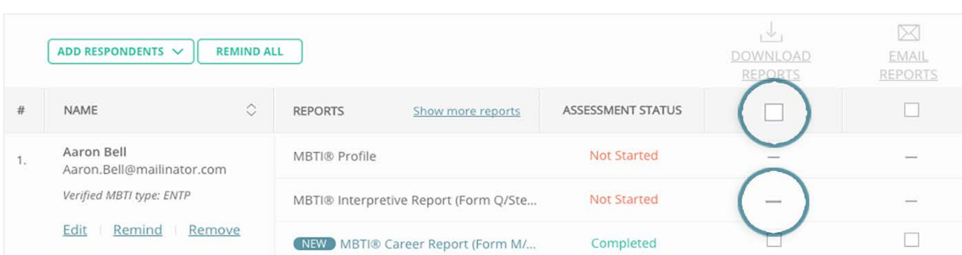


Step 3. Once you find the respondent for whom you want to download reports, check the box in the **Download Reports** column. Then, scroll up to the column header and click the **Download Reports** button.



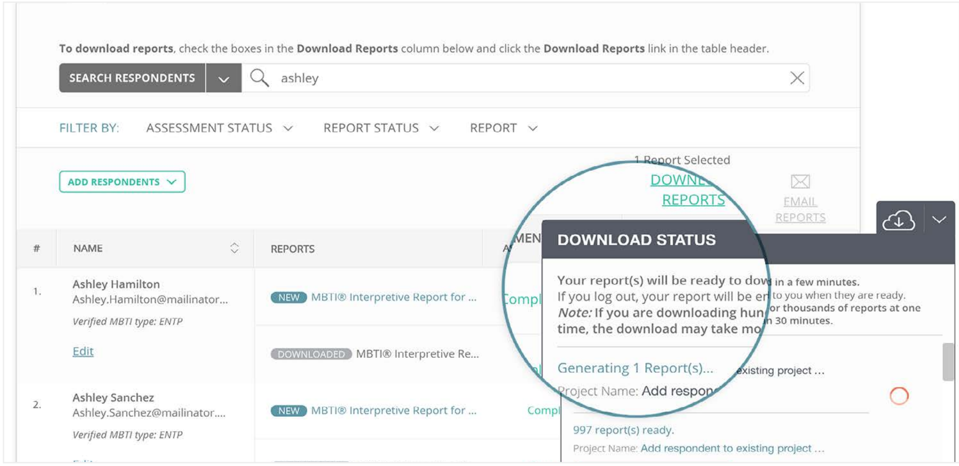
Note: A dash in this column indicates that your respondent has not yet completed the assessment for that particular report. Once your respondent completes the assessment, a checkbox will appear and you will be able to download the report.

Pro tip: Checking the box in the header will select all the reports in the table.



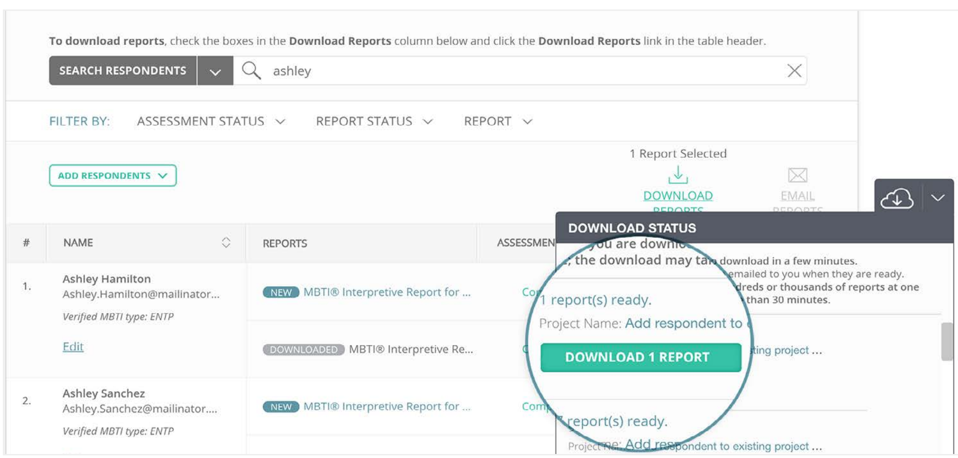
Step 4. When your download begins, a **Download Status** pop-up will appear on your screen. This pop-up lets you know when your reports are ready to download. You can continue using the site while you wait, or choose to log out.

Note: If you log out, your reports will be emailed to you automatically.



Step 5. When your reports are ready, the **Download Status** pop-up will expand and you will see a **Download Reports** button. Click **Download Reports** to download the reports.

> *Note:* Depending on your browser, the reports will appear at the bottom of your browser window or in a separate pop-up window.



Can I download a report more than once?

Yes. You can download reports as many times as you like with no additional charge. See question 1 for a detailed overview on how to download reports.

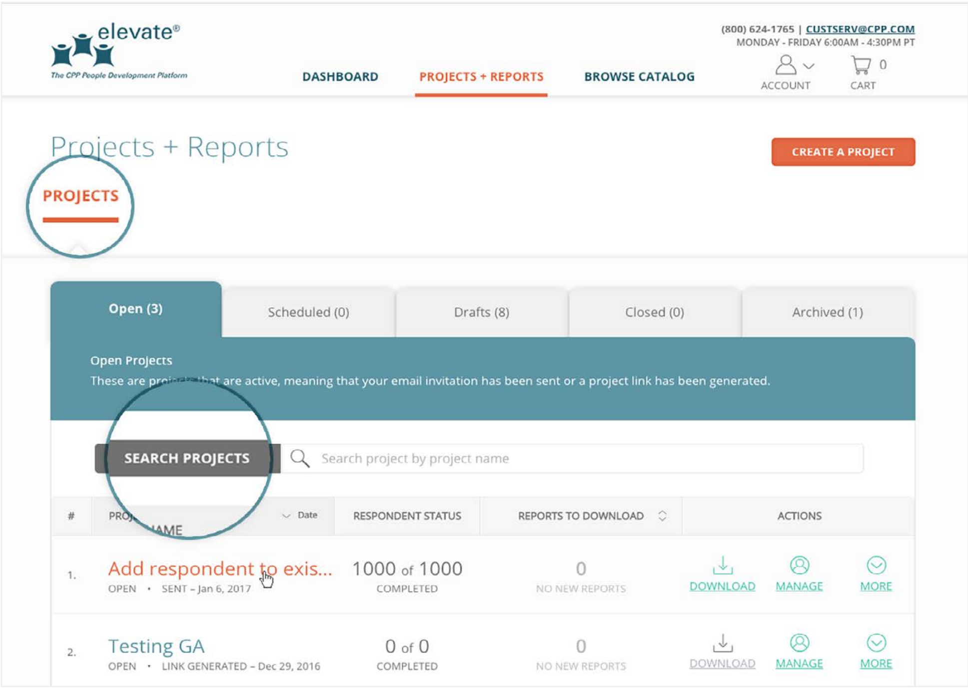
How do I download a different type of report? Do I need to create a new project?

You do not need to create a new project to download a different type of report. To download a different report, simply add it to your existing project.

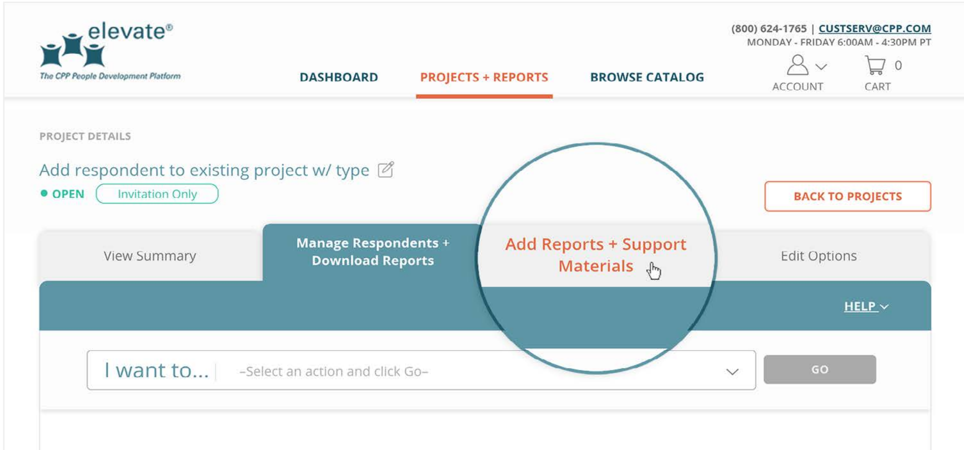
To add a report to an existing project, follow the steps below.

Step 1. Click on the **Projects + Reports** navigation tab.

Step 2. In the **Projects** table, search for the project to which you want to add a report and click on the **project name**. This will take you to the **Manage Respondents + Download Reports** tab in **Project Details**.



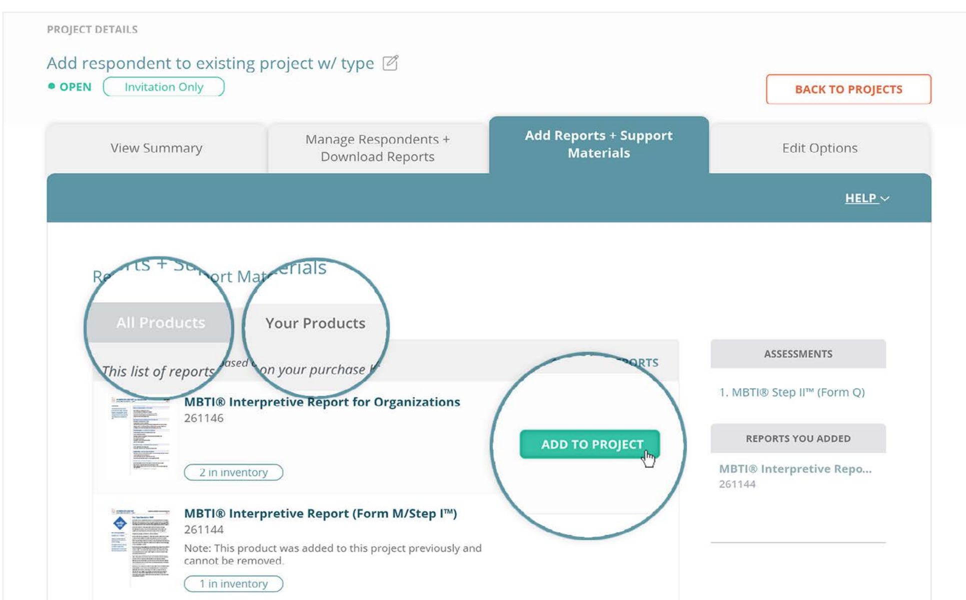
Step 3. Once you are in **Project Details**, click on the **Add Reports + Support Materials** tab.



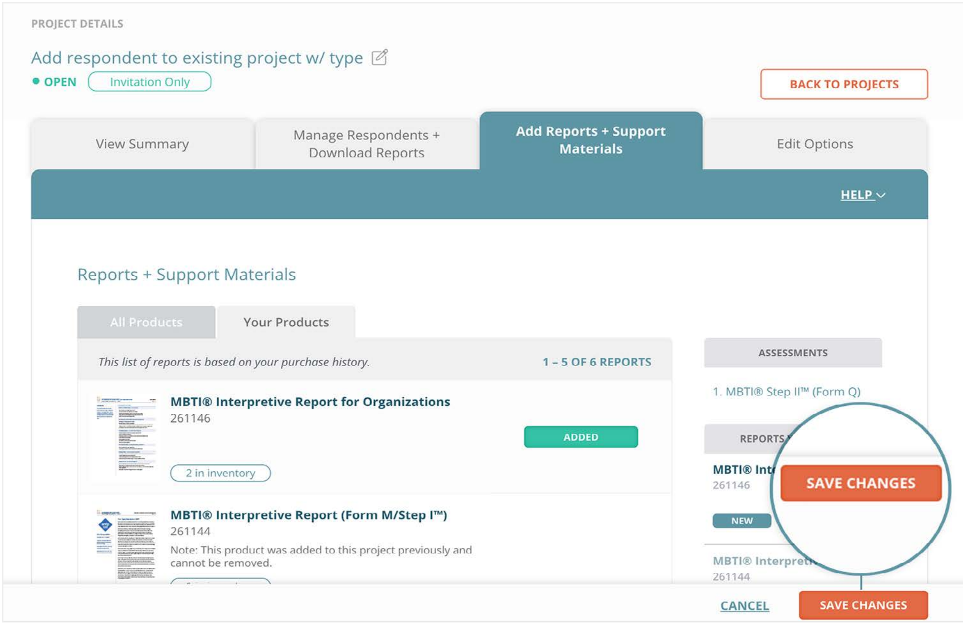
Step 4. From this tab you can add reports to your project. You can either add reports from the **Your Products** tab, which includes reports that you have previously purchased, or you can add reports from the **All Products** tab, which contains all the reports you are eligible to purchase and administer.

Once you have found the report you are looking for, click the **Add to Project** button next to the report name.

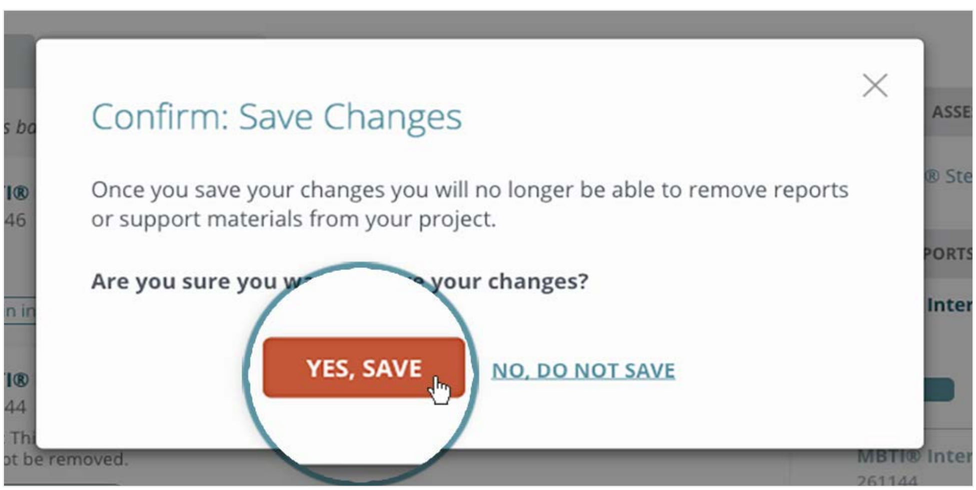
> *Note:* You can add support materials to your project from this tab as well.



Step 5. When you have finished adding reports to your project, click on the **Save Changes** button in the footer.



A pop-up will appear asking you to confirm your changes. Remember, once your changes are saved you will no longer be able to remove this report from your project. Click **Yes, Save** to continue.

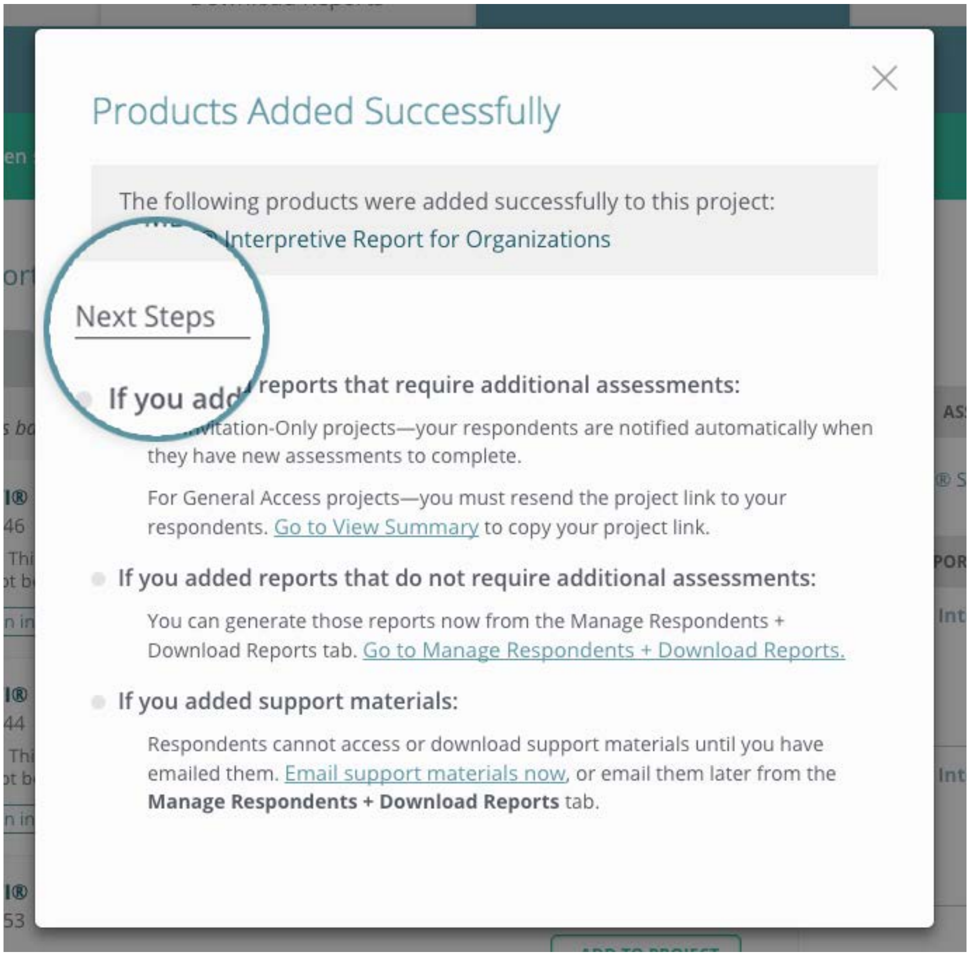


Step 6. Once your changes have been saved, a **Products Added Successfully** pop-up will appear.

If you added a report that requires your respondents to take another assessment, you must first wait for your respondents to complete the additional assessment to download the report.

If you added a report that does not require your respondents to take another assessment, click on the **Go to Manage Respondents + Download Reports** link to download reports for your respondents.

See question 1 for a detailed overview on how to download reports.



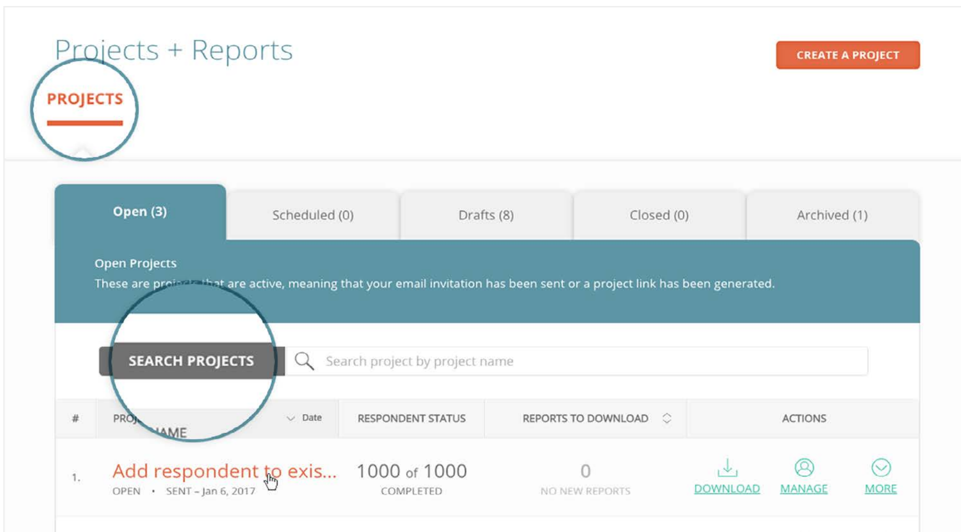
How do I email reports to my respondents?

Emailing reports to your respondents is similar to downloading reports.

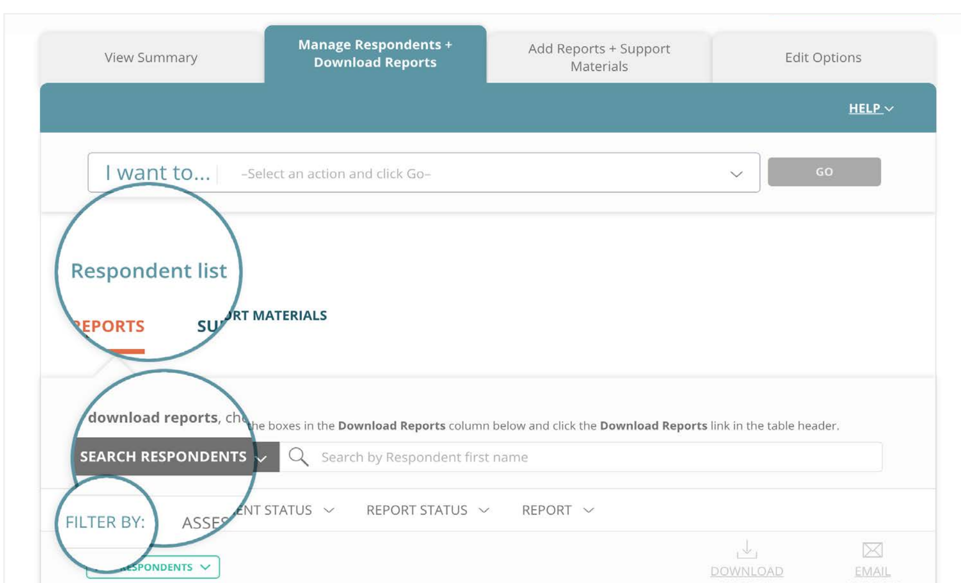
To email reports to your respondents, follow the steps below.

Step 1. Click on the **Projects + Reports** navigation tab.

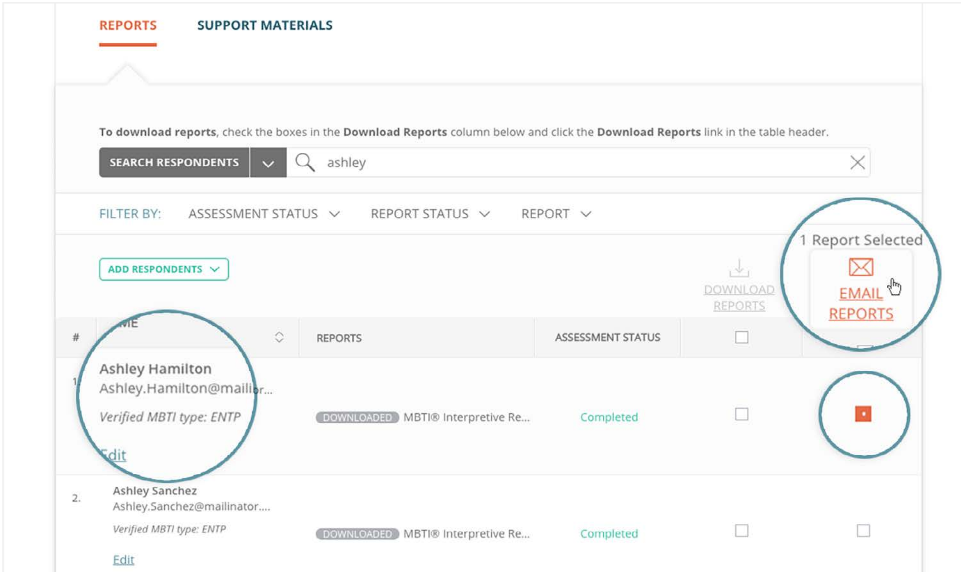
Step 2. In the **Projects** table, search for the project for which you want to email reports and click on the **project name**. This will take you to the **Manage Respondents + Download Reports** tab in **Project Details**.



Step 3. From here, scroll down to the **Respondent List**. You can search for the respondent to whom you want to email reports by using the search bar, or filter by assessment status, report status, or report.

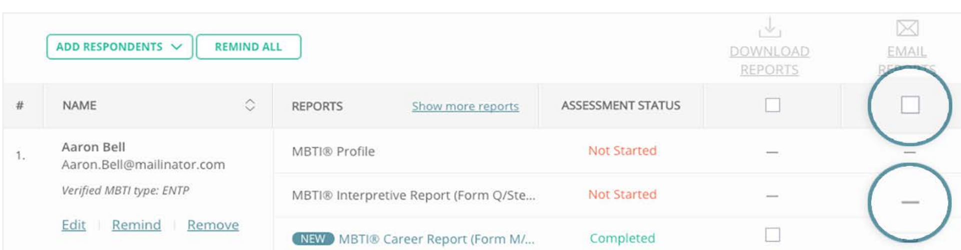


Step 4. Once you find the respondent you want to email reports to, check the box in the **Email Reports** column. Then, scroll up to the column header and click on the **Email Reports** button.



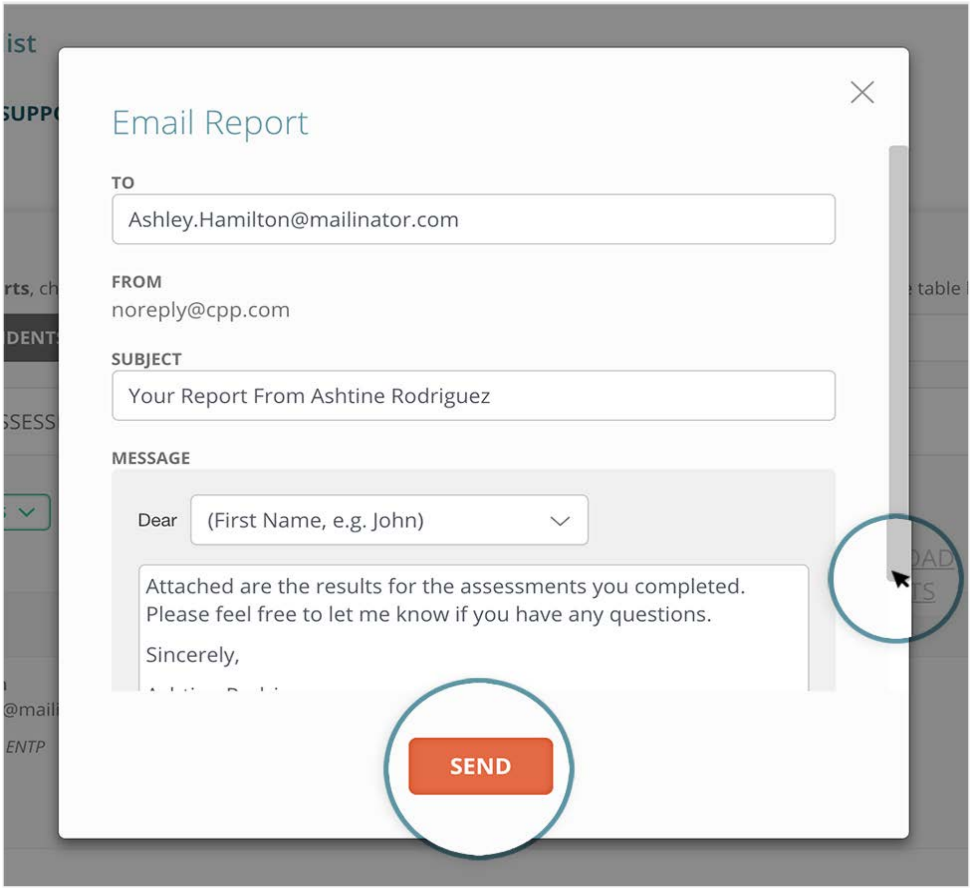
Note: A dash in this column indicates that your respondent has not yet completed the assessment for that particular report. Once your respondent completes the assessment, a checkbox will appear and you will be able to email the report.

Pro tip: Checking the box in the header will select all the reports in the table.



Step 5. Before sending the email you will be able to edit it from the **Email Report** pop-up. You can edit the subject, greeting, and message. Once you have finished editing your email, click **Send** to send it.

Note: You may need to use the scrollbar on the right to view all the content in the pop-up.



Once your email has been sent, a success message will appear on the screen.

> *Note:* Your respondents will receive their emailed reports as attachments, which they can download.