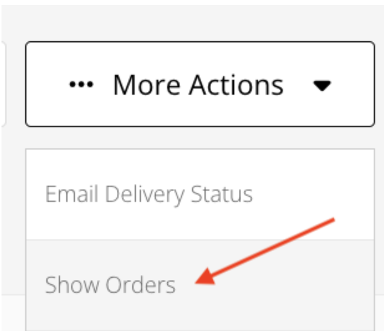
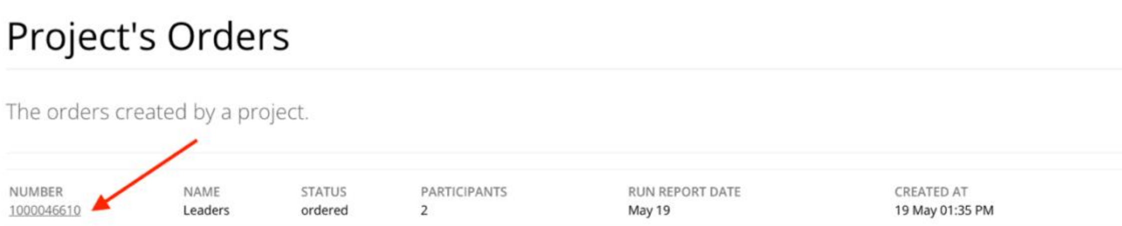
HOW TO ACCESS AND SHARE INTERACTIVE LCP REPORTS FOR PRACTITIONERS AND PROJECT MANAGERS

Practitioners and project managers access reports in the same way.

First, go to the project. On the project page, find “More Actions” and select “Show Orders.”

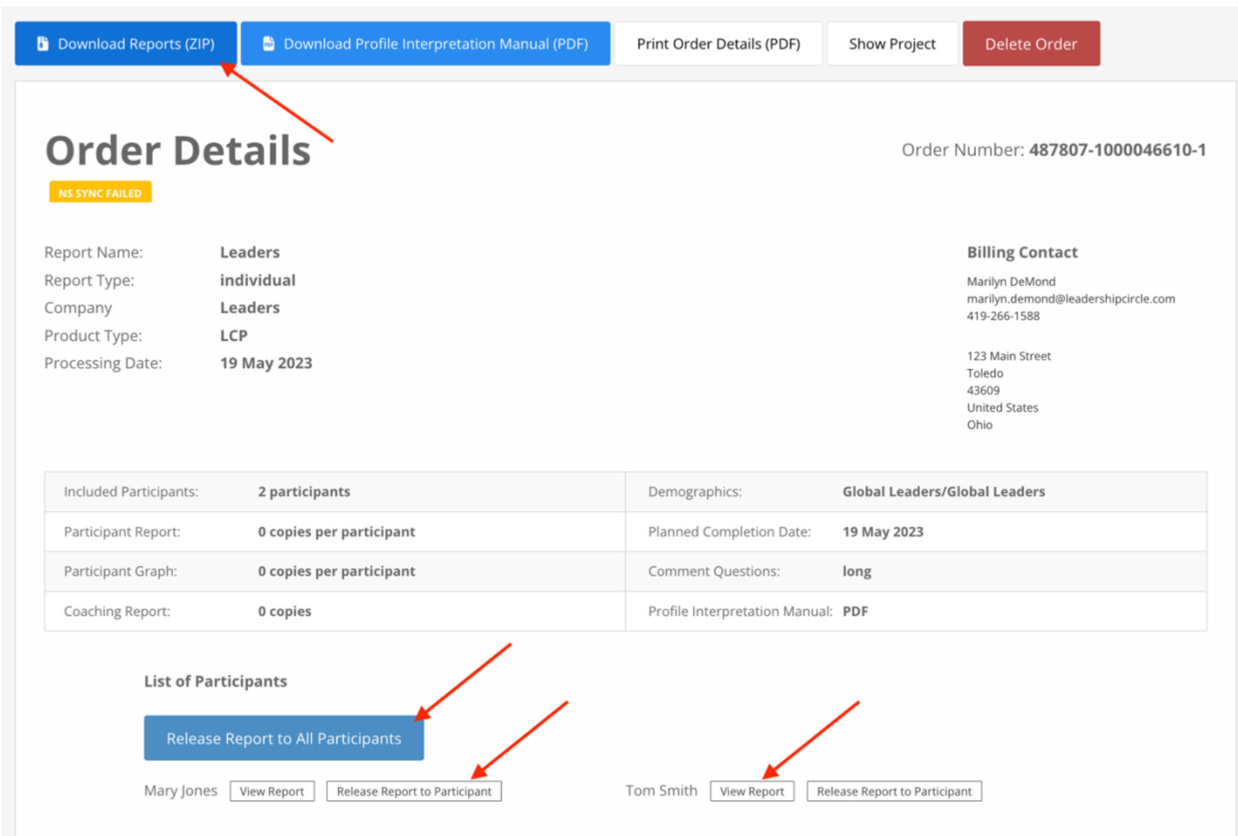


Next, click on the “Number” link to open the Order Details page.



On the Order Details page, locate the “Download Reports (ZIP)” button. Clicking this button will download the following:

- Legacy Coach Report
- Legacy Graph
- Legacy Participant Report
- Participant Report (from interactive report)

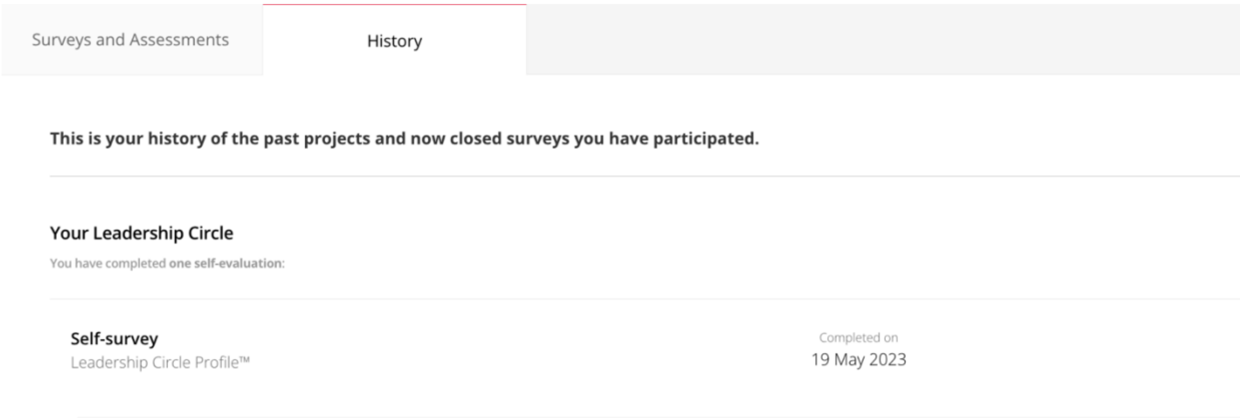


Now, find the List of Participants. You’ll see a button that reads “Make All Reports Available.” Clicking this button will make it possible for each participant to view their own report from their My Survey History page.

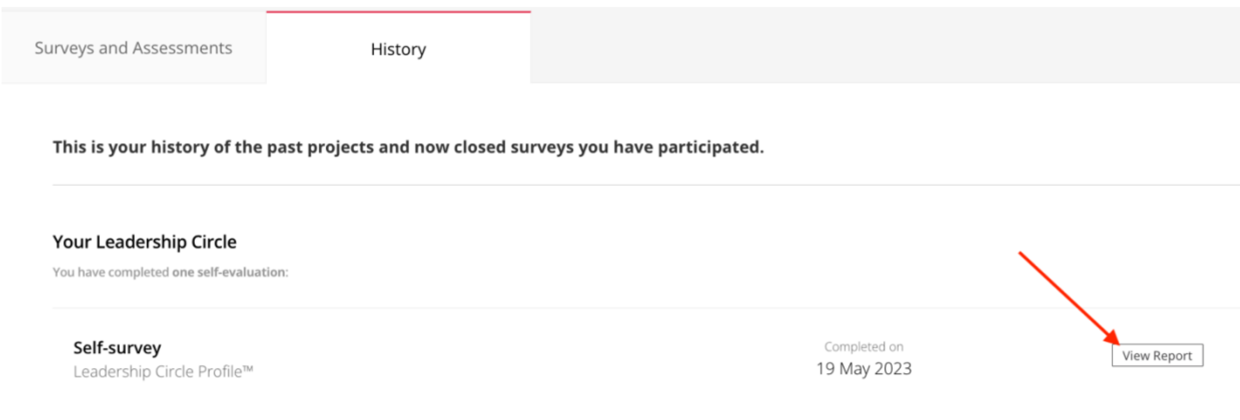
Next to each participant’s name are two buttons: “View Interactive Report” and “Make Report Available to Participant.” Selecting “View Interactive Report” will open the report for you. Selecting “Make Report Available to Participant” will make it possible for that participant to view their report from their My Survey History page.

Reports are not viewable to participants on their My Survey History pages until the “Make All Reports Available” button or “Make Report Available to Participant” button is clicked.

Participant's view of My Survey History page **before** their report is made available.

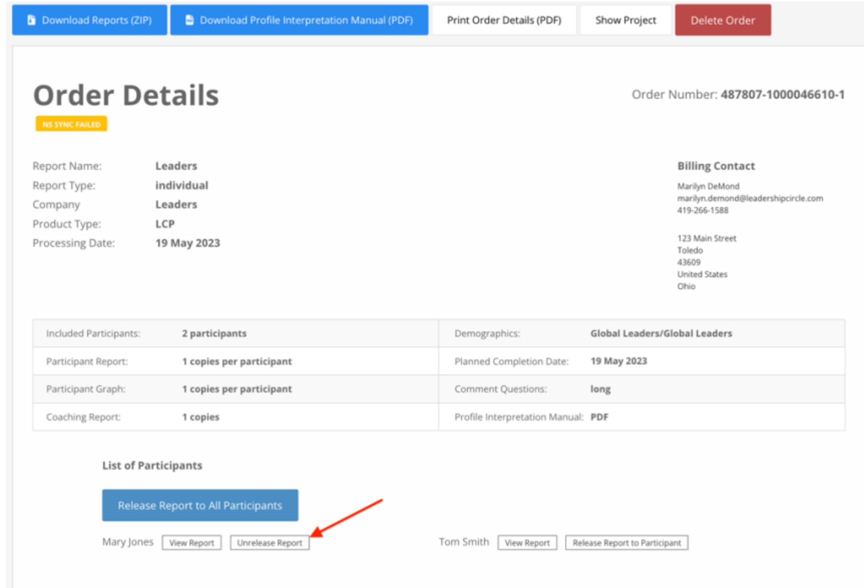


Participant's view of My Survey History page after their report is made available. Note the "View Interactive Report" button.



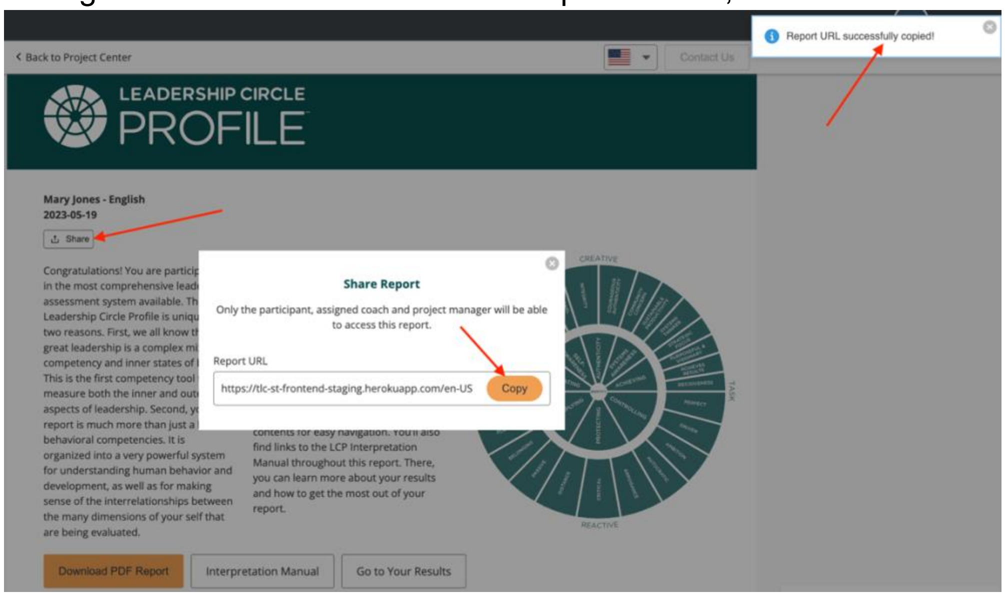
Once a report is made available to a participant, the button changes to "Undo 'Make Report Available.'"

Did you make the report available by mistake? Did the date of your debrief change, and you don't want the participant to have access to their report just yet? Click "Undo 'Make Report Available'" to reverse the action and make the report unavailable until you're ready to release it.



When a practitioner or project manager clicks the "View Interactive Report" button, the participant's interactive LCP report will open.

1. To share the report link with the participant, click "Share."
2. The Share Report window will open and display the report URL.
3. Click "Copy."
4. The message "Report URL successfully copied" will appear.
5. Email the report URL to the participant.



When the participant clicks on the URL link within the email, they will be taken to Project Center to log in.

After the participant logs in, the interactive report will open.

If the report doesn't open, the participant can click on the "History" tab then "View Report" button.