

## BASICS

# Create a Project



Click on a question below to skip to the answer.

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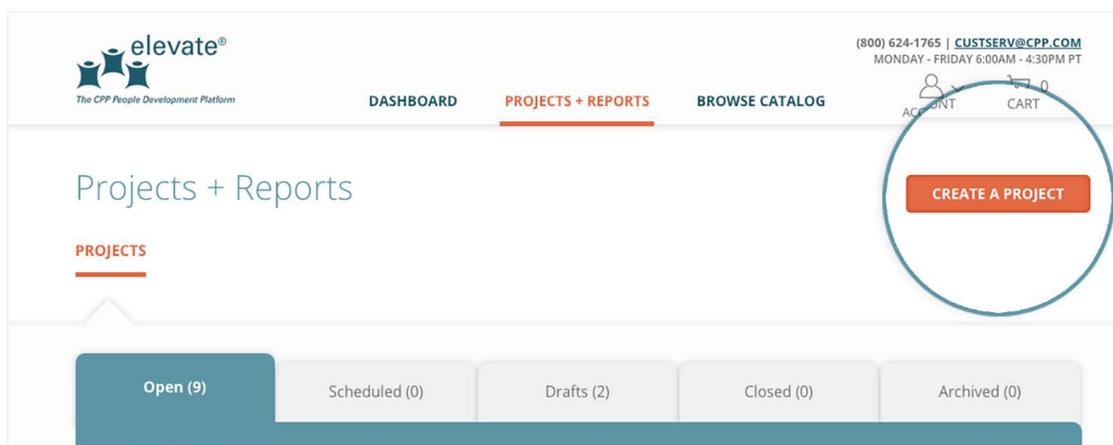
# How do I create a project?

To create a project, follow the steps below.

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



**Step 2.** Click the **Create a Project** button.



**Step 3.** From here you will begin the **Create a Project** workflow. If you need help, click on the question mark icons for more information. The **project name** and **project type** are required fields.

Additionally, you have the option of adding a project description and expiration date. To add a project description or project expiration date, click on the appropriate link.

The screenshot shows a 'Create a Project' dialog box with the following elements: a title 'Create a Project' with a 'New' tag and a close button; a 'PROJECT NAME' section with a text input field containing 'Project name', a note 'Name will be visible to your respondents', and a '110 character limit' indicator; an optional link 'Add a project description (optional)'; a 'PROJECT TYPE' section with two radio button options: 'Invitation-Only' (selected) with the subtext 'Upload respondents' names and email addresses' and 'General Access' with the subtext 'Generate a project link'; another optional link 'Add a project expiration date (optional)'; and a prominent orange 'CREATE' button at the bottom. Red circles highlight the 'PROJECT NAME' label, the description link, the 'Invitation-Only' radio button, and the 'CREATE' button.

When you are finished click **Create** to create your project.

*Note:* For more information on the difference between **Invitation-Only** and **General Access** projects see [question 2](#).

This screenshot is identical to the one above, showing the 'Create a Project' dialog box. In this version, a red circle highlights the orange 'CREATE' button at the bottom of the form.

**Step 4.** Next, you must set up your project. If your project is **Invitation-Only**, you must **add respondents to your project**. You have two options: (1) **add respondents individually** or (2) **upload multiple respondents at once from a CSV file**. Each of these options requires you to know your respondents' first name, last name, and email address. If you don't have all this information, don't worry: you can add respondents to your project later.

*Note:* If your project is **General Access**, you do not need to upload your respondents' full name and email address. [Skip to Step 5](#).

The screenshot displays the Elevate web interface for a project titled "Invitation-Only Project Test". The navigation bar includes the Elevate logo, "DASHBOARD", "PROJECTS + REPORTS" (highlighted), and "BROWSE CATALOG". Contact information and account/cart icons are also present. A progress bar shows four steps: "STEP 1 Add Respondents" (active), "STEP 2 Add Reports", "STEP 3 Set Options", and "STEP 4 Schedule / Send Email Invitations". The main content area is titled "Add Respondents" and features two buttons: "Add Individual" and "Upload From File". Below these are input fields for "FIRST NAME", "LAST NAME", and "EMAIL ADDRESS", along with a "VERIFIED MBTI TYPE (OPTIONAL)" dropdown and an "ADD" button. To the right, a "Respondent List" table is shown, currently empty with the message "You have not yet added any respondents to your project." and a "NEXT" button at the bottom right.

Once you have finished adding respondents to your project, click on the **Next** button in the bottom right of your screen.

LAST NAME  
Respondent last name

EMAIL ADDRESS  
Respondent email address

VERIFIED MBTI TYPE (OPTIONAL) ?  
SELECT A TYPE

ADD

RESPONDENT LIMIT: 5,000 1 - 1 of 1 RESPONDENTS / ROWS

NEXT

SAVE + FINISH LATER NEXT

**Step 5.** Next, you must **add reports to your project** so Elevate® can determine which assessments your respondents must take. You can filter reports by language, product family, and product type. If you know the report you want to add, you can search for it by title or product code in the search box.

elevate®  
The CPP People Development Platform

(800) 624-1765 | [CUSTSERV@CPP.COM](mailto:CUSTSERV@CPP.COM)  
MONDAY - FRIDAY 6:00AM - 4:30PM PT

DASHBOARD **PROJECTS + REPORTS** BROWSE CATALOG

ACCOUNT CART 0

PROJECT DETAILS  
Invitation-Only Project Test.   
● DRAFT Invitation Only

STEP 1 Add Respondents **STEP 2 Add Reports** STEP 3 Set Options STEP 4 Schedule / Send Email Invitations

STEP 2: Add Reports

HELP

All Reports

Your Reports

Search by report name or product code

SHOW FILTER OPTIONS SHOW FILTER OPTIONS 1 - 5 OF 48 REPORTS

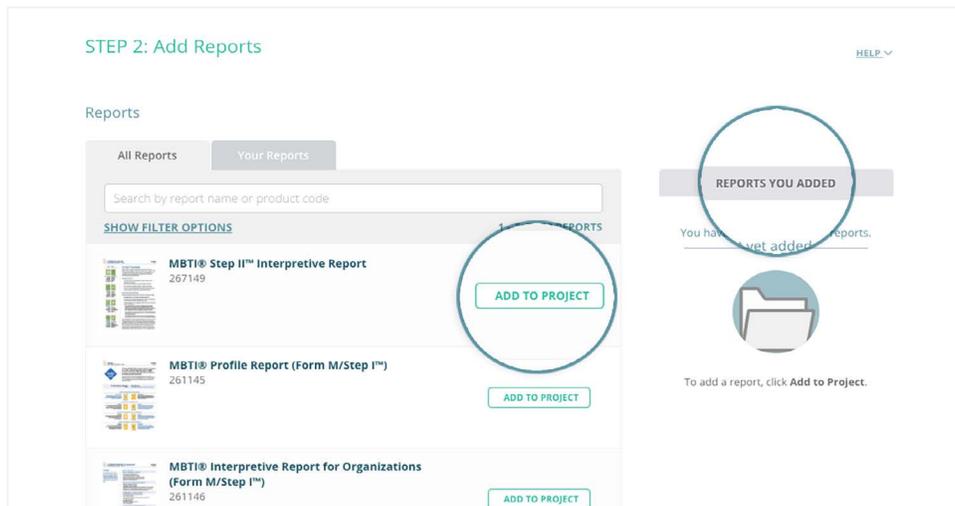
	MBTI® Step II™ In...	267149	ADD TO PROJECT
	MBTI® Profile Report (Form M/Step I™)	261145	ADD TO PROJECT
	MBTI® Interpretive Report for Organizations (Form M/Step I™)	261146	ADD TO PROJECT

REPORTS YOU ADDED

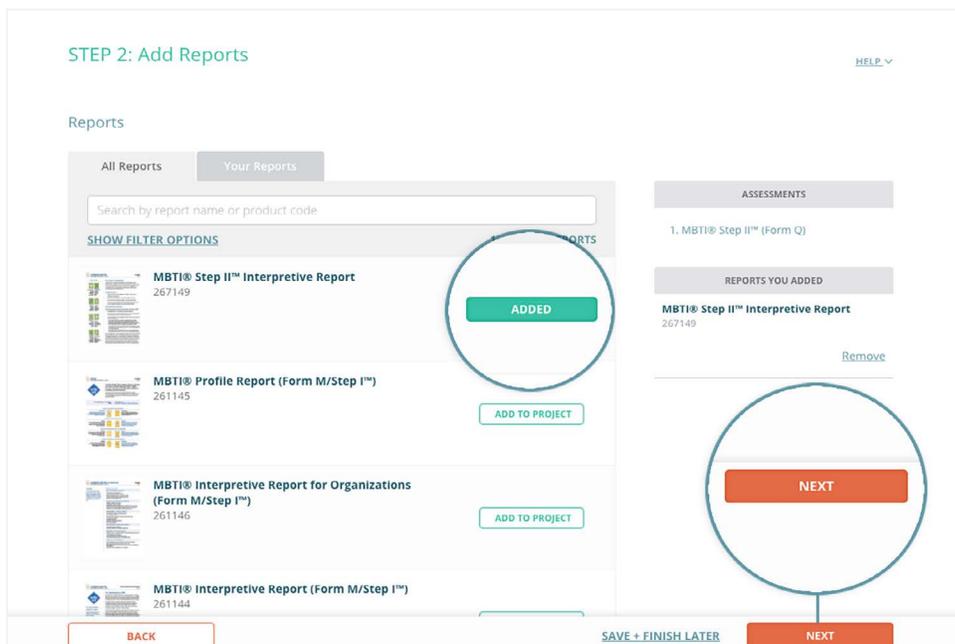
You have not yet added any reports.

To add a report, click Add to Project.

When you have found the product you would like to add to your project, click the **Add to Project** button next to the report name. The report will appear in the **Reports You Added** section on the right.



Once you have added all the reports you need for your project, click the **Next** button.



**Step 6.** Next, you must **edit your project options**. The options are automatically set to the most common options for your project type and the reports you selected. Here you can enable respondents to take a demographic survey, customize report covers, set an assessment completion notification, and auto-generate reports (for Invitation-Only projects only).

To edit an option, click the option row. Once you have finished editing your options, click the **Next** button.

The screenshot shows a project setup interface. At the top, it says 'PROJECT DETAILS' and 'Invitation-Only Project Test' with a 'DRAFT' status and 'Invitation Only' label. A progress bar at the top indicates four steps: STEP 1 (Add Respondents), STEP 2 (Add Reports), STEP 3 (Set Options), and STEP 4 (Schedule / Send Email Invitations). STEP 3 is currently active and highlighted with a blue circle. Below the progress bar, the title 'STEP 3: Set Options' is displayed. Underneath, there is a section titled 'Options' with five toggleable settings: 'Auto-Generate Reports: NO', 'Notify Me of Assessment Completion YES', 'Customize Report Covers: NO', 'Schedule Automated Assessment Reminder: NO', and 'Enable Demographic Survey: YES'. A 'NEXT' button is located at the bottom right of the options section, circled in blue. At the bottom of the page, there are three buttons: 'BACK', 'SAVE + FINISH LATER', and 'NEXT'.

*Note:* Selecting **Yes** to the **Give Respondents Access to Reports** or **Auto-Generate Reports** option requires that you purchase reports immediately after setting up your project. This will avoid delays in generating reports and your respondents having access to them.

**Step 7.** If your project is **Invitation-Only**, you will be prompted to edit your email invitation. The email invitation is the email that will be sent to your respondents letting them know they have assessments to complete. You can edit the email subject, greeting, and message.

Once you have edited the email invitation, review your project details on the right and make any necessary edits. When you're ready, you can choose to schedule your email invitation for a future date by clicking **Schedule Later**, or send your email invitation immediately by clicking **Send Now**. If you are not ready to schedule or send your email invitation, you have the option to **Save + Finish Later**.

PROJECT DETAILS

Invitation-Only Project Test 

● DRAFT Invitation Only

STEP 1 Add Respondents → STEP 2 Add Reports → STEP 3 Set Options → **STEP 4 Schedule / Send Email Invitations**

**STEP 4: Schedule / Send Email Invitation**

Email Invitation

**TO**  
Your respondents who have assessments to complete PREVIEW

**FROM**  
noreply@cpp.com

**SUBJECT**

**MESSAGE**

Dear

As we previously discussed, I have ordered an assessment for you to complete online. This email contains the link for you to begin the assessment along with some tips on how to get the most out of your experience. Be assured that the assessment website you'll be using meets the highest standards of privacy and security—responses and personal information are secure.

[Click here to get started.](#)

Sincerely,  
Ashtine Rodriguez

SAVE + FINISH LATER

Notify me when  my respondents.

**RESPONDENTS**  
0 total EDIT

**REPORTS**  
1. MBTI® Profile Report (Form M/Step 1™) EDIT

**OPTIONS**  
Auto-Generate Reports: NO  
Notify Me of Assessment Completion: YES  
Customize Report Covers: NO

ALL

SCHEDULE LATER SEND NOW

BACK SAVE + FINISH LATER SCHEDULE LATER SEND NOW

If your project is **General Access**, you will be prompted to generate your project link. Review your project details on the right and make any necessary edits. When you're ready, click **Generate Link** to generate your project link.

PROJECT DETAILS

General Access Project Test 

● DRAFT General Access

STEP 1 Add Reports → STEP 2 Set Options → **STEP 3 Generate Project Link**

**STEP 3: Generate Project Link**

Project Link

Your project link has not been generated.



Review your project details on the right and make any necessary edits. Once you are finished, click **Generate Link** to generate your project link.

**REPORTS**  
1. MBTI® Profile Report (Form M/Step 1™) EDIT

**OPTIONS**  
Notify Me of Assessment Completion: YES  
Customize Report Covers: NO  
Schedule Auto:

SHOW ALL

GENERATE LINK

BACK SAVE + FINISH LATER GENERATE LINK

**Step 8.** Once you have scheduled or sent your email invitation, or generated your project link, you will be taken to a confirmation page. From this page you can add reports to your cart and view recommended next steps.

*Note:* If your project is **General Access**, you must copy the project link and email it to your respondents, from your private email address, in order for them to take their assessments.

Your email invitation has been sent.  
Your email invitation was sent on January 10, 2017 to 1 respondent.

### Next Steps

- 1. **Manage Your Project**  
The **Projects Table**, located in the **Projects + Reports** navigation tab, will help you manage your project. From there you can view how many respondents have completed their assessments. **Manage this Project** to view or edit the details of this project.  
[MANAGE THIS PROJECT](#) [GO TO PROJECTS TABLE](#)
- 2. **Add Reports to Your Shopping Cart**  
Once your respondents have completed their assessments, you can add reports to your shopping cart. We recommend that you add reports to your cart more in order to generate them. We recommend that you add reports to your cart later time. Alternatively, you can click on **ADD TO CART + BUY LATER** to be able to edit the quantity of reports.  
[ADD TO CART + BUY LATER](#) [ADD TO CART + BUY LATER](#)

**Your project link has been generated.**  
Copy the link below and email it to your respondents so they can take their assessments.  
<https://pdp-demo.cpp.com/Respondents/ReturningUser?tokenId=2957aa15-462b-46f3-b10c-788bc6b110de> [COPY LINK](#)

### Next Steps

- 1. **Email Project Link**  
Because your project is a **General Access** project, you must copy the project link above and email it to your respondents, from your private email, in order for them to take their assessments. Also, to paste the project link in your email you will right click on your mouse and click paste.  
[COPY PROJECT LINK](#)
- 2. **Manage Your Project**  
The **Projects Table**, located in the **Projects + Reports** navigation tab, will help you manage your project. From there you can view how many respondents have completed their assessments, see if there are new reports to generate, and edit your project details. Click **Manage this Project** to view or edit the details of this project, or click **Go to Projects Table** to view all your projects.  
[MANAGE THIS PROJECT](#) [GO TO PROJECTS TABLE](#)
- 3. **Add Reports to Your Shopping Cart**

Feedback | Terms and License | Terms

Once you navigate away from the project confirmation page, you will find your project in the **Projects** table by clicking on the **Projects + Reports** navigation tab.

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[DASHBOARD](#) [PROJECTS + REPORTS](#) [BROWSE CATALOG](#)

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[ACCOUNT](#) [CART](#)

What is the difference between an Invitation-Only project and a General Access project?

**Invitation-Only** projects require that you upload your respondents' first name, last name, and email address to your project. Only respondents you add to your project will be able to take assessments. Once you have finished creating and setting up your project, an email invitation will be sent from Elevate® to your respondents, notifying them they have assessments to complete.

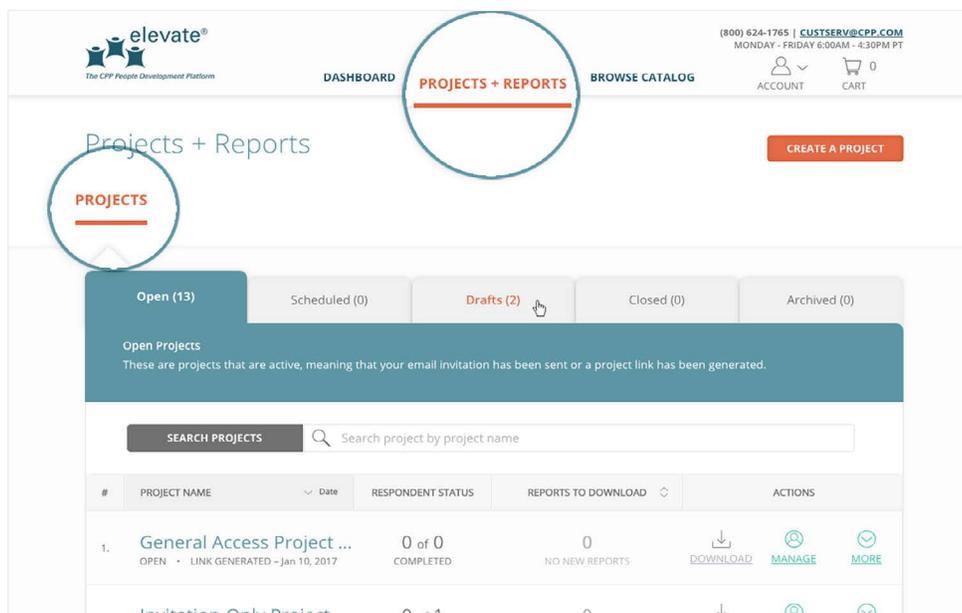
*Note:* Invitation-Only projects give you more control over who takes your assessments.

**General Access** projects do not require you to upload respondents to your project—you simply generate a project link. To enable respondents to complete their assessments, you must email them the project link from your private email address. Anyone who has access to the project link will be able to take an assessment, but you will be charged only for the reports you download.

## Can I delete a project?

Yes. To delete a project, follow the steps below.

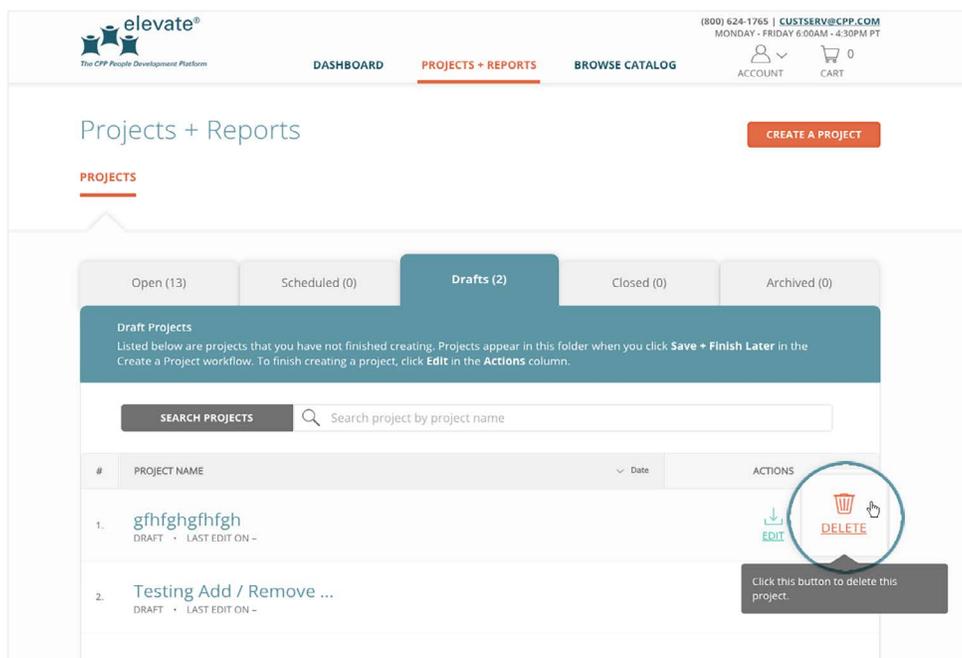
**Step 1.** Go to the **Projects** table, located in the **Projects + Reports** navigation tab, and click on the **Drafts** or **Scheduled** tab.



The screenshot shows the Elevate dashboard interface. At the top, the Elevate logo is on the left, and contact information (800) 624-1765 | CUSTSERV@CPP.COM is on the right. The navigation bar includes 'DASHBOARD', 'PROJECTS + REPORTS' (highlighted with a red circle), and 'BROWSE CATALOG'. Below the navigation bar, the 'Projects + Reports' section is visible, with a 'CREATE A PROJECT' button. The 'PROJECTS' sub-tab is also highlighted with a red circle. Underneath, there are tabs for 'Open (13)', 'Scheduled (0)', 'Drafts (2)' (selected with a mouse cursor), 'Closed (0)', and 'Archived (0)'. A description for 'Open Projects' states: 'These are projects that are active, meaning that your email invitation has been sent or a project link has been generated.' Below this is a search bar for projects. A table lists project details:

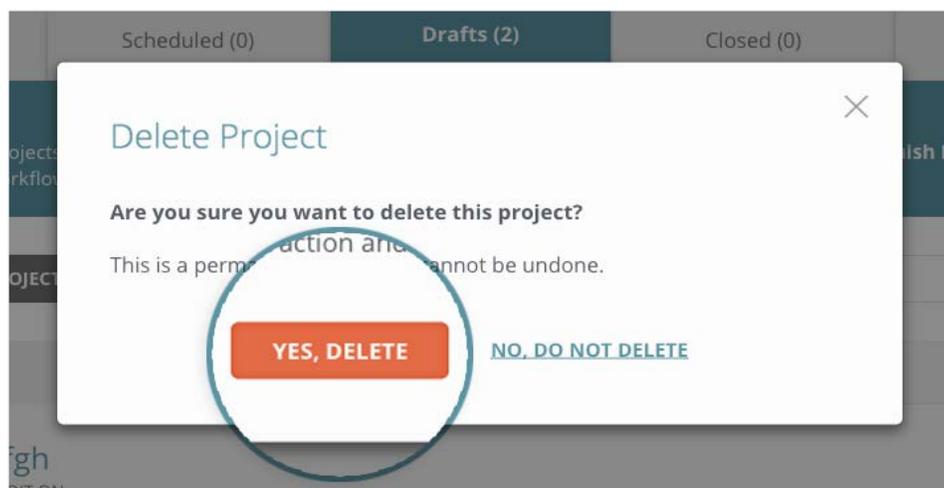
#	PROJECT NAME	Date	RESPONDENT STATUS	REPORTS TO DOWNLOAD	ACTIONS
1.	General Access Project ...	OPEN · LINK GENERATED – Jan 10, 2017	0 of 0 COMPLETED	0 NO NEW REPORTS	DOWNLOAD MANAGE MORE
2.	Invitation-Only Project		0 of 1	0	DOWNLOAD MANAGE MORE

**Step 2.** Once you find the project you want to delete, click on the **Delete** button in the **Actions** column.



**Step 3.** Lastly, you'll confirm that you want to delete your project by clicking **Yes, Delete** in the **Delete Project** pop-up.

*Note:* Deleting a project is a permanent action and cannot be undone.



## How will I get the assessment link to my respondents?

How your respondents get the assessment link depends on whether your project is **Invitation-Only** or **General Access**.

If your project is **Invitation-Only**, an email is sent automatically to your respondents. The email displays the content you provided in the email invitation when creating your project. Remember, Invitation-Only projects give you more control over who takes your assessments than do General Access projects.

If your project is **General Access**, you must copy your project link and manually send it out to your respondents from your private email address. General Access projects allow anyone who has access to the project link to take assessments, but you are charged only for the reports you download.

## How will I know my respondents have completed an assessment?

How you are notified that your respondents have completed an assessment depends on whether or not you selected **Yes** to the **Notify Me of Assessment Completion** option when creating your project.

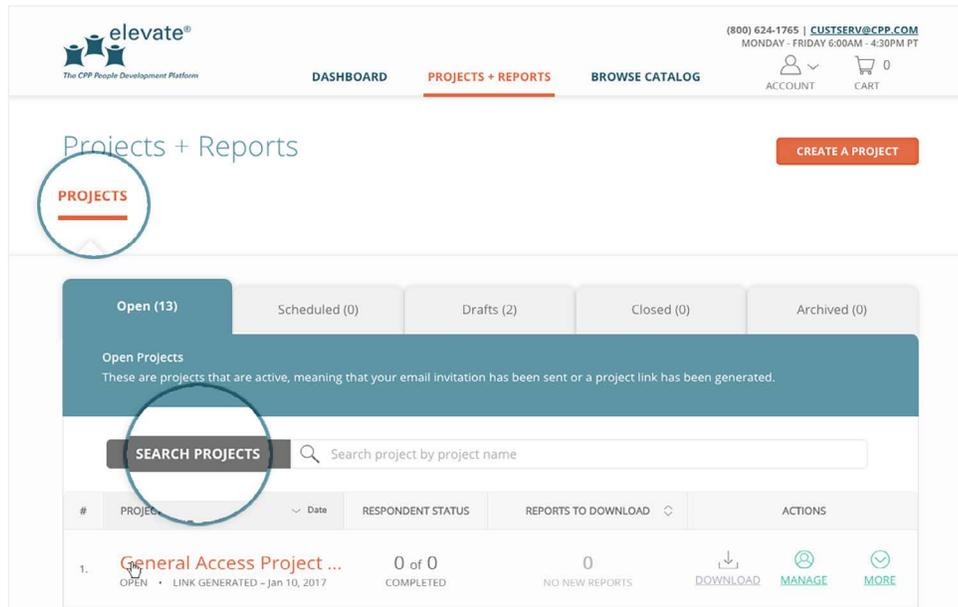
If you selected **Yes**, you will receive an email when a respondent has completed his or her assessment.

If you selected **No**, you must log in to your Elevate® account and manually check on your respondents' status. To manually check your respondents' status, follow the steps below.

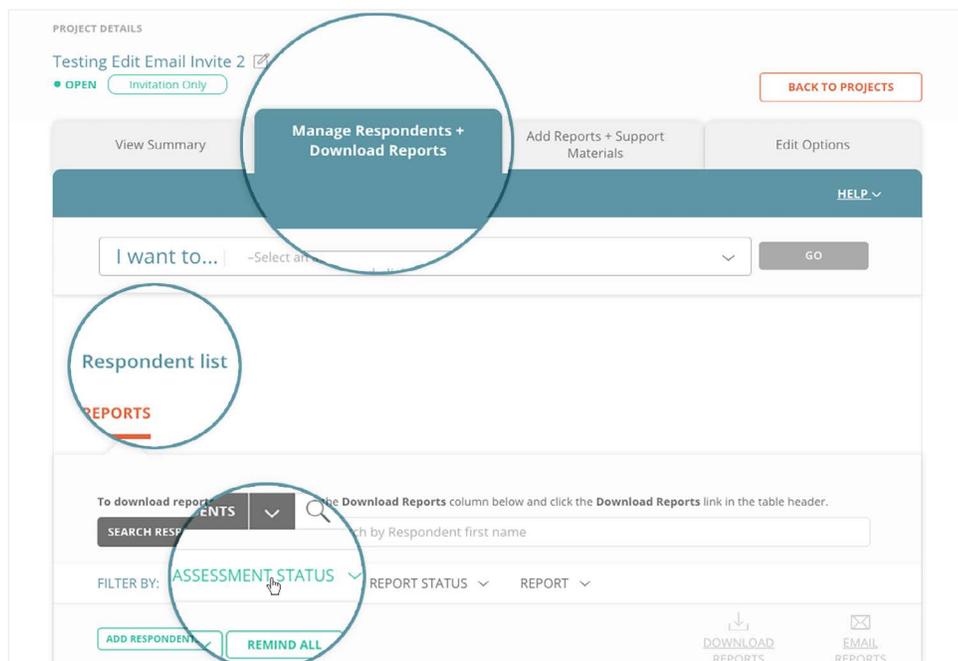
**Step 1.** Click on the **Projects + Reports** navigation tab.



**Step 2.** In the **Projects** table, search for the project you are looking for and click on the **project name**.



**Step 3.** From the **Manage Respondents + Download Reports** tab scroll down to the **Respondent List**, and click on the **Assessment Status** filter.



**Step 4.** Clicking on the **Assessment Status** filter will expand the Assessment Status drop-down menu. Check the box next to **Completed** to filter the table and show only reports for which your respondents have completed assessments.

Click the **X** button to close the Assessment Status drop-down menu.

Respondent list

**REPORTS**

To download reports, check the boxes in the **Download Reports** column below and click the **Download Reports** link in the table header.

SEARCH RESPONDENTS

FILTER BY: ASSESSMENT STATUS ^ REPORT STATUS v REPORT v

Clear All Select All Clear All X

In Progress

Completed

Not Started

ADD RESPONDENT

#	NAME	ASSESSMENT STATUS	DOWNLOAD REPORTS	EMAIL REPORTS
1.	Ashtine Rodri... arodriguez@cpr... Verified MBTI type: INFJ Interpretive Report for Organiza...	Completed	<input type="checkbox"/>	<input type="checkbox"/>

[Edit](#) | [Remind](#) | [Remove](#)