TOP TIPS FOR THE PROJECT CENTER

1. To find your Active Projects and view progress, send reminders: click the Active Projects in the top menu bar

2. When extending out your Completion Date or Run Report Date you need to select both the DATE and TIME. Watch out for the green "Data Saved." message in the bottom right hand corner of the screen.

3. To find your Reports, click My Reports in the top menu bar. Reports now run automatically on the date and time that you set in your Project. If your "Download Reports (ZIP)" button is not blue, then either

   a) Your participant has not completed their Self Survey; or the

   b) Minimum completed evaluator survey number has not been reached (you set this number when you create the Project, the default number is 5)

   Check the Order Summary screen to ensure that all the Participants in your Project did run.

4. You can now upload multiple participants and their evaluators - there is a Template CSV that you can download to ensure that you get the correct format.

5. To quickly see the evaluator progress for a Participant, hover your mouse over the Participant name and a pop up will occur. To get the full version, click the Download CSV button found in either the Participant or Evaluator Tab.

6. Make sure you select the right Time Zone when Adding your Project. This determines the exact time of when emails are sent, the Completion Date and Run Report Date.

7. You can now edit the Invitation and Reminder emails for Participants and Evaluators. You can also schedule the date and time of when to send emails - this applies to both the Initial Invitation email and any emails that you wish to send during the Project.

8. To order your Group Report, when you are in your Project, click More Actions and select Create Group Report. You need to do this at the end of a Project, as you need the Participant's self survey to be completed to include them in the Group Report. Reports may take 3-5 minutes to process once the Order is placed.

*It's a good idea to send your evaluators a personal note in advance asking them to help with your growth as a leader, and letting them know they will receive an email from **notifications@theleadershipcircle.com** that will include instructions on how to participate.*

9. Watch the short "How To" Videos that are available in TLCGo!

10. To ensure that system emails get through please ensure that your clients White Listing TLC emails: emails are from **notifications@theleadershipcircle.com**; the domain we email from is **@MandrillApp.com**; the sending IP address is **205.201.137.6**.