

Report Tailoring - Assign Access Codes

Before assigning codes to a large number of people, it is recommended that you set up an Import Spreadsheet in Excel containing the names, email addresses, and the View Report status of your respondents.

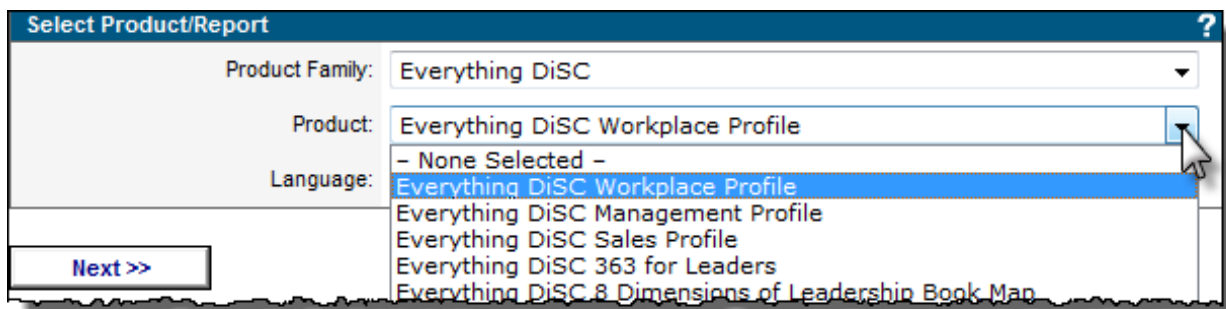
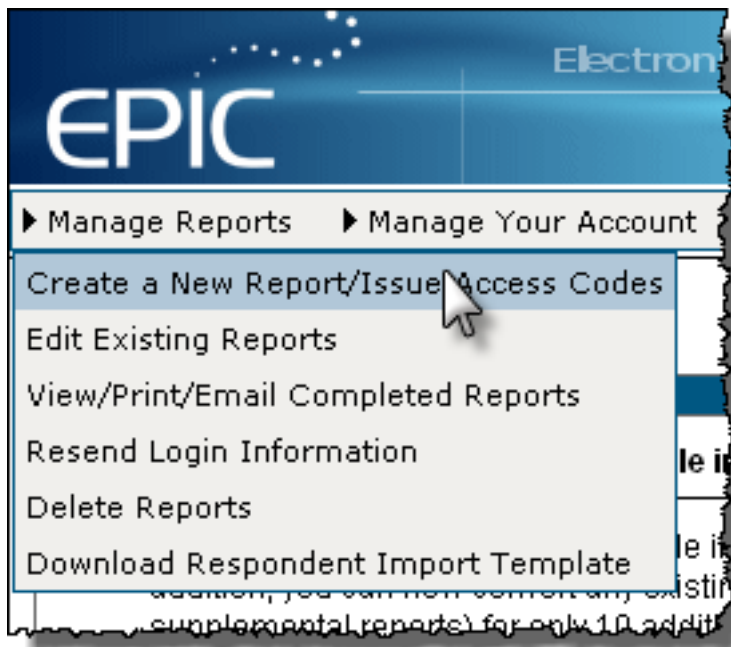
Click on **Help** in the EPIC navigation menu and select **Creating and Managing Reports** for instructions on how to Import Names.

When customizing emails, create and save custom messages to your **Custom Message Library** before assigning access codes. They will then be available for you to insert and edit when using custom email messages.

Click on **Help** in the EPIC navigation menu and select **Maintaining Your Personal Options** for instructions.

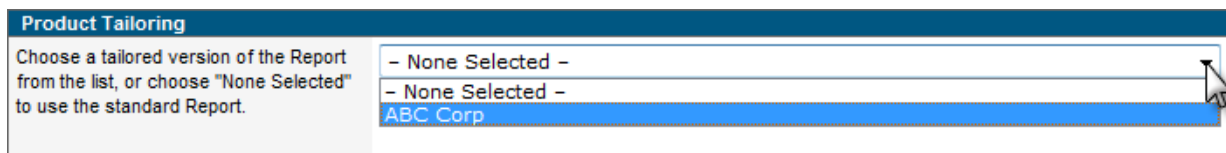
Once a report has been tailored, it can be used during the Assigning Pework Access Codes process. The tailored reports are stored within their original Product Family and Product category.

Select **Create a New Report/Issue Access Codes** from the Manage Reports menu and enter the **Product Family**, **Product**, and **Language** criteria for your tailored report. This example is a search for a tailored Everything DiSC Workplace Profile. Then click **Next**.



Make your selections in the **Report Options** and **Follow-up Activities** sections.

If you have created a tailored version of this report, it will be displayed when you click the down arrow in the **Product Tailoring** section. Select the tailored report you wish to assign, then click **Next** at the bottom of the screen. (If you choose **None Selected**, the standard report will be assigned.)



Note: The Product Tailoring section will only appear on this screen if you have created a tailored version of the product. See Manage Report Tailoring.

Continue with the standard process for assigning access codes.

