## **Report Tailoring - Getting Started**

Report tailoring can be accessed by selecting **Personal Options** in the EPIC navigation menu and clicking on **Manage Report Tailoring.** 

Electronic Profile Information Cent		
	22	
▶ Personal Options → Go To	Home → L	
View/Edit Account Information	1	
Manage Custom Messages		
Manage Report Tailoring 🔓		
	▶ Personal Options ▶ Go To View/Edit Account Information Manage Custom Messages	

To tailor a report, click the **Create a New Tailored Report** button.

Personal Options Manage Report Tailoring	Ì
Click the Create a New Tailored Report button to add a new Tailored Report.	l
Create a New Tailored Report	

Reports that are eligible for tailoring are displayed in the **Product Family** and **Product**dropdown boxes in the Create Tailored Report section.

Create Tailored Report	?
Product Family:	Everything DiSC
Product:	- None Selected -
Language:	– None Selected – Everything DiSC Sales Profile Everything DiSC Management Profile
File Name:	Everything DISC Workplace Profile

Once a product is selected, the entire Create Tailored Report screen is displayed. The screen is divided into two parts. The top section is used to identify your report and customize the name. The bottom section is used to rearrange and customize the report.

Create Tailored Report		?
Product Family:	Everything DiSC	*
Product:	Everything DiSC Workplace Profile	c
Language:	English	<u> </u>
File Name:	ABC OnBoarding	
OUse default Program Name:	EVERYTHING DISC WORKPLACE®	;
Ouse custom Program Name:	ABC New Hire Orientation	– 'E I
View Report Cover: Description:	<u>Color Report Cover</u>   <u>Black/White Report Cover</u>	Report Identifica
Move Up   Move Down   Remo	/e Page   <u>Reset Pages</u>   <u>Show All</u>   <u>Hide All</u>	?
<ul> <li> <ol> <li>Cover Page (Page 1)</li> <li>Introduction to DiSC<sup>®</sup> (Page 1)</li> <li>Introduction to DiSC<sup>®</sup> (Page 1)</li> <li>Discovering Your DiSC<sup>®</sup> Style</li> <li>Your DiSC<sup>®</sup> Style (Page 1)</li> <li>Your DiSC<sup>®</sup> Style (Page 1)</li></ol></li></ul>	tyle ge 3) vview (Page 4) <sup>®</sup> Priorities (Page 5) tressors (Page 6) <sup>®</sup> Styles (Page 7) les	Report Tailoring