

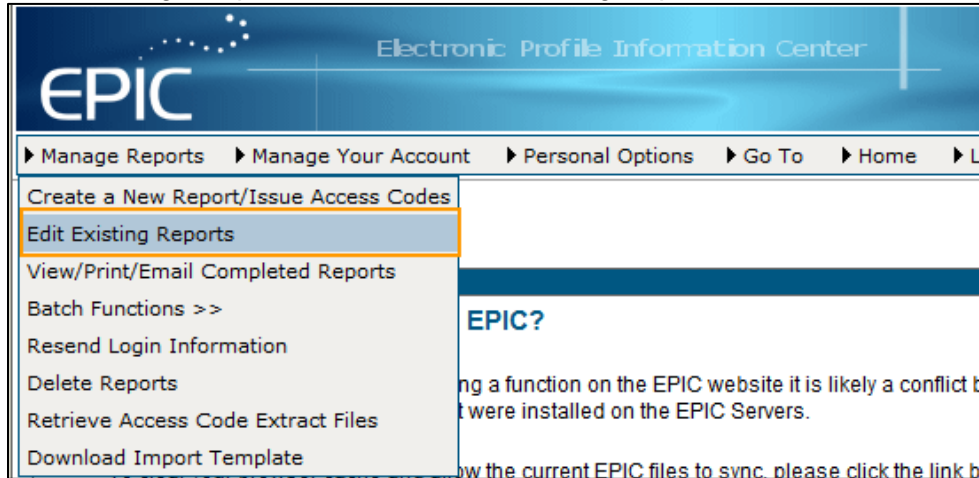
Instructions for upgrading 79-item Everything DiSC® Profiles to AT Everything DiSC Profiles

(Option to update *Workplace* begins 10/18/12, *Work of Leaders* on 1/3/13, *Management* on 10/31/13)

Use this process to work with one *Everything DiSC Profile* at a time.
(See page 6 for instructions when working with many records.)

This process must be followed to receive FREE upgrades to *Everything DiSC AT* version.

1. Go to Manage Reports and select Edit Existing Reports



2. Search for record:

- Select completed access codes
- Select Everything DiSC as the product family
- Select the *Everything DiSC Profile* type you'd like to upgrade
- Click Search

A screenshot of the EPIC "Manage Reports" search interface. The page title is "Manage Reports" with sub-links "Edit Existing Reports" and "Search". Below the title is a search instruction: "Enter data in one or more of the Search Criteria fields, then click the Search button. To clear all Search Criteria fields, click the Reset button." The search criteria form includes:

- a** Access Code Status: Complete (dropdown)
- Access Code: (text input)
- Start Date: (calendar icon) mm/dd/yyyy
- End Date: (calendar icon) mm/dd/yyyy
- b** Product Family: Everything DiSC (dropdown)
- c** Product: Everything DiSC Workplace Profile (dropdown)
- Language: English (dropdown)
- Folder: - None Selected - (dropdown)
- Sub Folder: - None Selected - (dropdown)
- Email: (text input)
- Name: (text input)
- Results Per Page: 10 (dropdown)

At the bottom are "Search" and "Reset" buttons. A small "d" is placed near the bottom left of the form area.

3. Once you've found the record, select Edit

Manage Reports Manage Your Account Personal Options Go To Home Logout Help

Manage Reports

Edit Existing Reports • Search Results Displaying results 1 - 4 of 4

Your search results are listed below. Click **Edit** to edit a profile.

Search Results	Sort by: Assigned Date	Ascending	Descending	Sort	?
Edit	Name: Daniela Johnson Alternate Name: Daniela Johnson Email: djohnson@create-a-roadster.com Access Code: XUEALWHF5L	Product: Everything DiSC Workplace Profile Language: English Account: Thomas J. Smith Consulting Last Generated: 3/4/2011	Assigned: 3/3/2011 Completed: 3/3/2011 Folder: Sub Folder:		
Edit	Name: Ed Martin Alternate Name: Ed Martin Email: emartin@create-a-roadster.com Access Code: YJC9LXN6R3	Product: Everything DiSC Workplace Profile Language: English Account: Thomas J. Smith Consulting	Assigned: 3/3/2011 Completed: 3/3/2011 Folder: Sub Folder:		

4. Scroll down to the bottom of the page. From the dropdown menu that says "Select a Report," choose *Everything DiSC _____ Profile (AT)*.
5. Click Use existing data for new Report.

Manage Reports Manage Your Account Personal Options Go To Home Logout Help

Manage Reports

Edit Existing Reports • Edit Respondent Information

Update the respondent information, then click the **Save Changes** button to save your changes.

Respondent Information

Access Code: YJC9LXN6R3

Edits remaining for this Report: 2

Email Address:

Folder: [New Folder](#)

Sub Folder: [New Sub Folder](#)

Product: Everything DiSC Workplace Profile

Language: English

Name entered by Administrator:

Alternate First Name entered by Respondent:

Alternate Last Name entered by Respondent:

Gender:

Date Assigned: 3/3/2011

Date Completed: 3/3/2011

Total Credits: 15

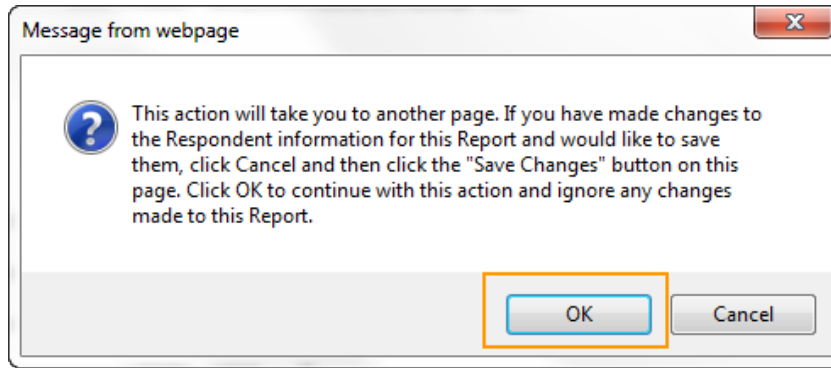
Allow Respondent to view Report online?: Yes No

Access Code Status: Complete

Advanced Options

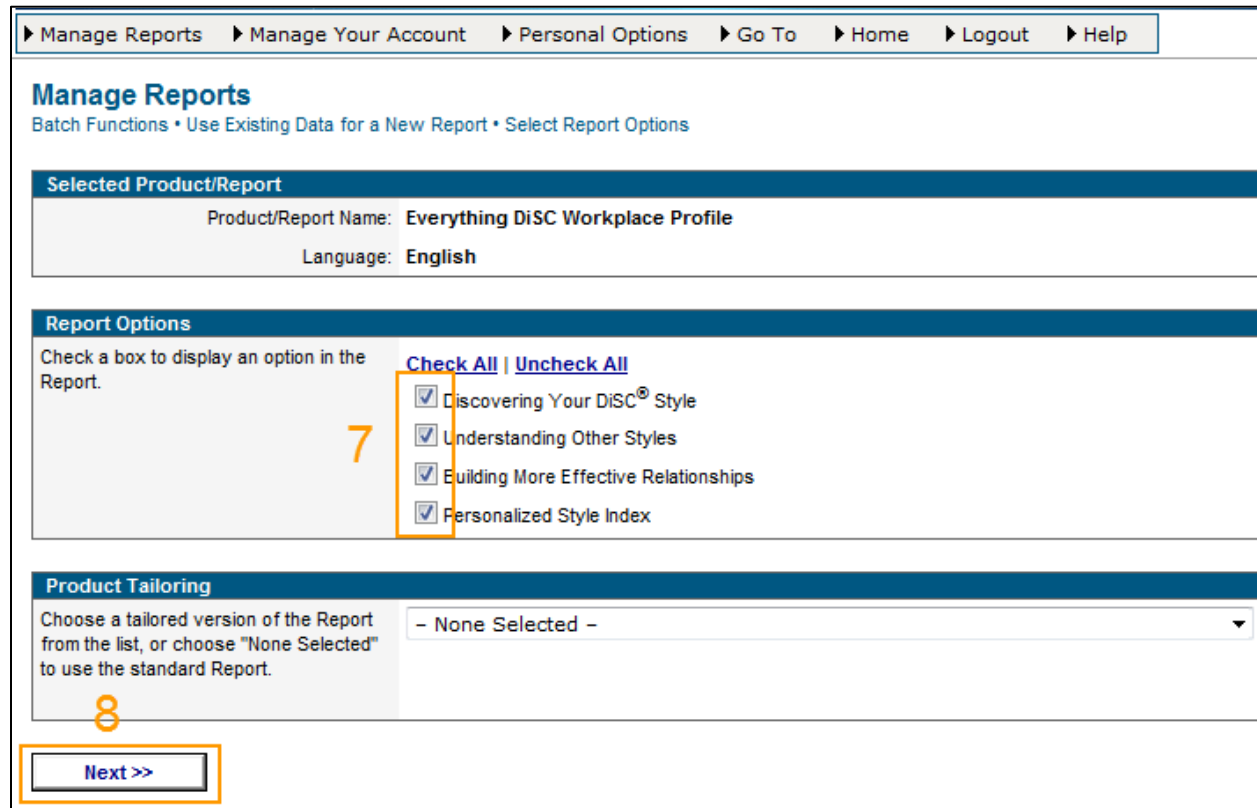
Use existing data for new Report Everything DiSC Workplace Profile (AT)

6. Click OK to go to the assign access code page



7. Select your Report Options (these options will be different for each *Everything DiSC Profile*)

8. Click Next



9. Assign Folder/Sub Folder (Optional)
10. Choose Viewing Option
11. Select Create Report

► Manage Reports ► Manage Your Account ► Personal Options ► Go To ► Home ► Logout ► Help

Manage Reports

Create a New Report/Issue Access Codes • Create a New Report

Review the Report information below. Click **Create Report** to create the Report.

Report Information

Product: **Everything DiSC Workplace Profile**
Language: **English**
Report Options: **Discovering Your DiSC® Style, Understanding Other Styles, Building More Effective Relationships, Personalized Style Index**

9 Folder: - None Selected - [New Folder](#)
Sub Folder: - None Selected - [New Sub Folder](#)

First Name: **Ed**
Last Name: **Martin**
Gender: **Male**

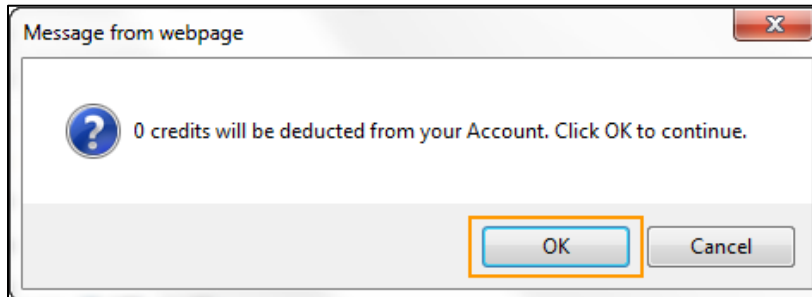
10 Email Address:

Allow Respondent to view Report online?: Yes No

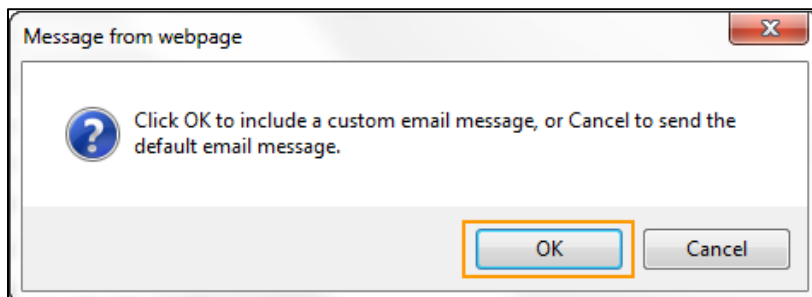
11 Credits: **0**

[Create Report](#)

12. Click OK to accept the EPIC credit charge. (Zero credits)



13. Choose OK to include a Custom Message



14. Choose Subject Line if creating Custom Subject Line (Optional)
15. Create Email Message or select from library
16. Click OK

Manage Reports

Create Custom Email

You can change the Subject and/or add a Custom Message to the email in the area below. When finished with your updates, click **OK** to continue and complete the process.

Custom Email Message

14

Default Subject: [ADMIN NAME] has registered you for: [PRODUCT NAME]

Custom Subject: [RESPONDENT NAME], your access code for [PRODUCT NAME] is now available

Note: The Default Subject will be translated based on the language of the individual Access Code. The Custom Email Subject will not be translated if selected.

15

Custom Message Folder: - None Selected -

Custom Message: - None Selected -

Font [] Size []

16

OK

Instructions for upgrading 79-item Everything DiSC® Profiles to AT Everything DiSC Profiles

(Option to update *Workplace* begins 10/18/12, *Work of Leaders* on 1/3/13, *Management* on 10/31/13)

Use this process to work with many *Everything DiSC Profiles* at one time. (Batch)
(See page 1 for instructions when working with one record at a time.)

This process must be followed to receive FREE upgrades to *Everything DiSC AT* version.

1. Go to Manage Reports and select Batch Functions>>Use Existing Data for New Report.

The screenshot shows a navigation menu with the following items: Manage Reports, Manage Your Account, Personal Options, Go To, and Home. A dropdown menu is open under 'Manage Reports', listing: Create a New Report/Issue Access Codes, Edit Existing Reports, View/Print/Email Completed Reports, Batch Functions >>, Resend Login Information, Delete Reports, Retrieve Access Code Extract Files, and Download Import Template. A second dropdown menu is open under 'Batch Functions >>', listing: Edit Report Options, Edit Delivery Options for Access Code Groups, Generate Reports for Download, Create/Generate Comparison Reports, Manage Existing Download Files, and Use Existing Data for New Report. Both 'Batch Functions >>' and 'Use Existing Data for New Report' are highlighted with orange boxes. The word 'browser.' is visible at the bottom left of the menu area.

2. Search for records:
 - a. Select Everything DiSC as the product family
 - b. Select the *Everything DiSC Profile* type you'd like to upgrade
 - c. Click Search

The screenshot shows the 'Manage Reports' page with the breadcrumb 'Batch Functions > Use Existing Data for a New Report > Select Reports'. Below the breadcrumb is a search instruction: 'Enter data in one or more of the Search Criteria fields, then click the Search button. To clear all Search Criteria fields, click the Reset button.' The 'Search Criteria' form contains the following fields: Access Code Status (Complete), Start Date (mm/dd/yyyy), End Date (mm/dd/yyyy), Product Family (Everything DiSC), Product (Everything DiSC Workplace Profile), Language (English), Folder (- None Selected -), Sub Folder (- None Selected -), Email, Name, and Results Per Page (10). The 'Product Family' and 'Product' dropdown menus are highlighted with orange boxes and labeled with 'a' and 'b' respectively. The 'Search' button is highlighted with an orange box and labeled with 'c'. A 'Reset' button is also visible.

3. Select the records you'd like and click Next.

Manage Reports
 Batch Functions • Use Existing Data for a New Report • Search Results Displaying results

Select Access Codes by clicking the box to the left of the name. Then click the **Next >>** button to continue. To select *all* Access Codes returned by the search, click the **Select All >>** button at the bottom of the page.

Search Results	Sort by: Assigned Date	Ascending	Descending	Sort
<input checked="" type="checkbox"/>	Name: Daniela Johnson Alternate Name: Daniela Johnson Email: djohnson@create-a-roadster.com Access Code: XUEALWHF5L	Product: Everything DiSC Workplace Profile Language: English Account: Thomas J. Smith Consulting Last Generated: 3/4/2011	Assigned: 3/3/2011 Completed: 3/3/2011 Folder: Sub Folder:	
<input checked="" type="checkbox"/>	Name: Ed Martin Alternate Name: Ed Martin Email: emartin@create-a-roadster.com Access Code: YJC9LXN6R3	Product: Everything DiSC Workplace Profile Language: English Account: Thomas J. Smith Consulting Last Generated: 3/4/2011	Assigned: 3/3/2011 Completed: 3/3/2011 Folder: Sub Folder:	
<input checked="" type="checkbox"/>	Name: Karen Smith Alternate Name: Karen Smith Email: ksmith@create-a-roadster.com Access Code: QYFRFDPTVE	Product: Everything DiSC Workplace Profile Language: English Account: Thomas J. Smith Consulting Last Generated: 3/4/2011	Assigned: 3/3/2011 Completed: 3/3/2011 Folder: Sub Folder:	
<input checked="" type="checkbox"/>	Name: Terry Hanson Alternate Name: Terry Hanson Email: thanson@create-a-roadster.com Access Code: L2XEQ3T6LB	Product: Everything DiSC Workplace Profile Language: English Account: Thomas J. Smith Consulting Last Generated: 3/4/2011	Assigned: 3/3/2011 Completed: 3/3/2011 Folder: Sub Folder:	

Next >> **Select All >>** **Return to Search Criteria**

4. Choose *Everything DiSC* _____ *Profile* (AT) from the dropdown menu and click Next.

Manage Reports
 Batch Functions • Use Existing Data for a New Report • Select New Report

Select the new report that will be created. Only eligible products will be displayed.

New Report

Products: Everything DiSC Workplace Profile (AT)

To add additional Reports to the list, click the **Add Reports** button. Once all of the Rep have been added, click the **Next** button to continue. To remove a name from the list, click **X**.

Reports Selected			
Email	Name	Product	Credits
X djohnson@create-a-roadster.com	Daniela Johnson	Everything DiSC Workplace Profile	0
X emartin@create-a-roadster.com	Ed Martin	Everything DiSC Workplace Profile	0
X ksmith@create-a-roadster.com	Karen Smith	Everything DiSC Workplace Profile	0
X thanson@create-a-roadster.com	Terry Hanson	Everything DiSC Workplace Profile	0
Total:			0

Next >> **Add Reports**

5. Select your Report Options (these options will be different for each *Everything DiSC Profile*)

Manage Reports

Batch Functions • Use Existing Data for a New Report • Select Report Options

Selected Product/Report

Product/Report Name: **Everything DiSC Workplace Profile**

Language: **English**

Report Options

Check a box to display an option in the Report. [Check All](#) | [Uncheck All](#)

- Discovering Your DiSC® Style
- Understanding Other Styles
- Building More Effective Relationships
- Personalized Style Index

Product Tailoring

Choose a tailored version of the Report from the list, or choose "None Selected" to use the standard Report.

- None Selected -

[Next >>](#)

6. Assign Folder/Sub Folder (Optional)

7. Choose Viewing Option

8. Click Next

▶ Manage Reports ▶ Manage Your Account ▶ Personal Options ▶ Go To ▶ Home ▶ Logout ▶ Help

Manage Reports

Batch Functions • Use Existing Data for a New Report • Create New Reports

Report Details

Product: **Everything DiSC Workplace Profile**

Language: **English**

Report Options: **Discovering Your DiSC® Style, Understanding Other Styles, Building More Effective Relationships, Personalized Style Index**

Product Tailoring:

Folder: - None Selected - [New Folder](#)

Sub Folder: - None Selected - [New Sub Folder](#)

Allow Respondent to view Report online?: Yes No

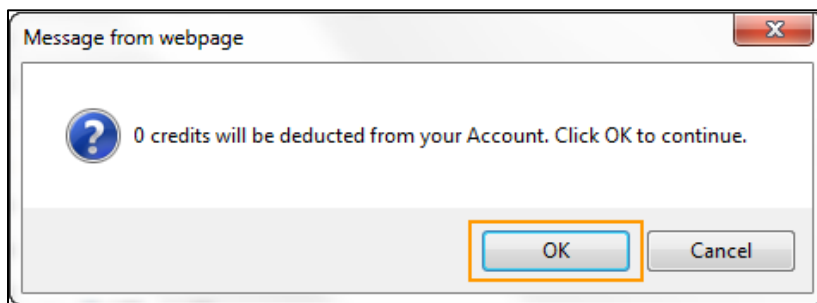
To remove a name from the list, click ✕. After selecting a Folder/Sub Folder to store your reports, and a View Report Online option, click the **Next** button to continue.

Reports Selected

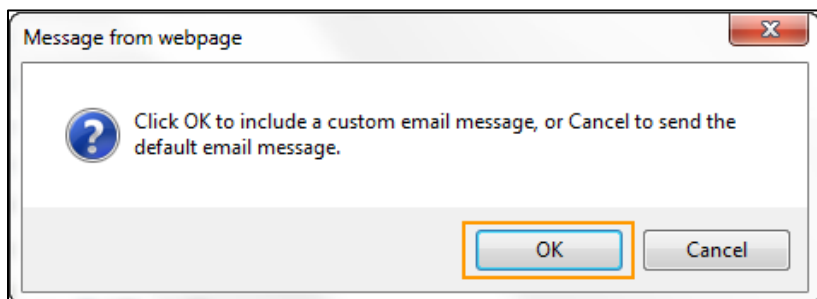
Email	Name	Product	Credits
✕ djohnson@create-a-roadster.com	Daniela J	Everything DiSC Workplace Profile	0
✕ emartin@create-a-roadster.com	Ed Martin	Everything DiSC Workplace Profile	0
✕ ksmith@create-a-roadster.com	Karen Smith	Everything DiSC Workplace Profile	0
✕ thanson@create-a-roadster.com	Terry Hanson	Everything DiSC Workplace Profile	0
Total:			0

[Next >>](#)

9. Click OK to accept the EPIC credit charge. (Zero credits)



10. Choose OK to include a Custom Message



11. Choose Subject Line if creating Custom Subject Line (Optional)

12. Create Email Message or select from library

13. Click OK

