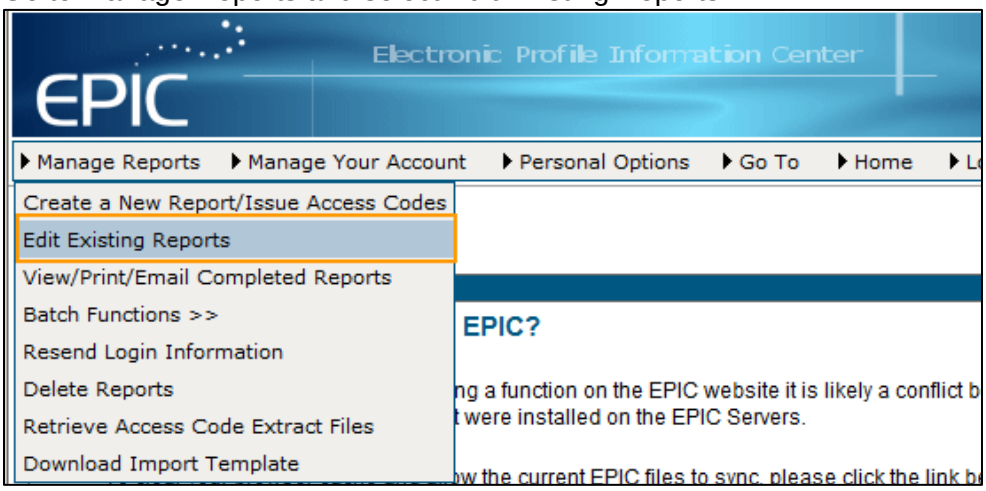
Instructions for upgrading 79-item Everything DiSC® Profiles to AT Everything DiSC Profiles
(Option to update *Workplace* begins 10/18/12, *Work of Leaders* on 1/3/13, *Management* on 10/31/13)

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

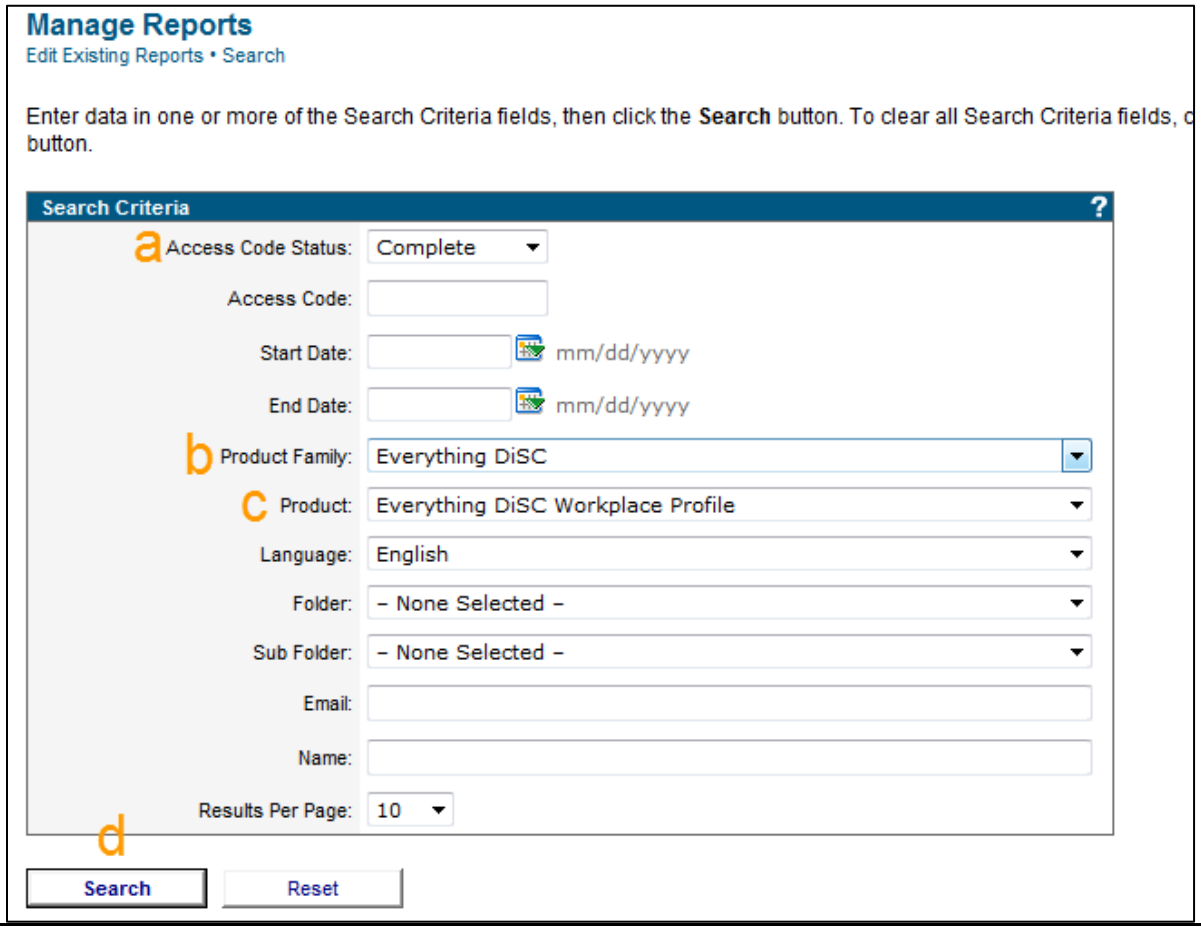
This process must be followed to receive FREE upgrades to *Everything DiSC* AT version.

1. Go to Manage Reports and select Edit Existing Reports



2. Search for record:

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



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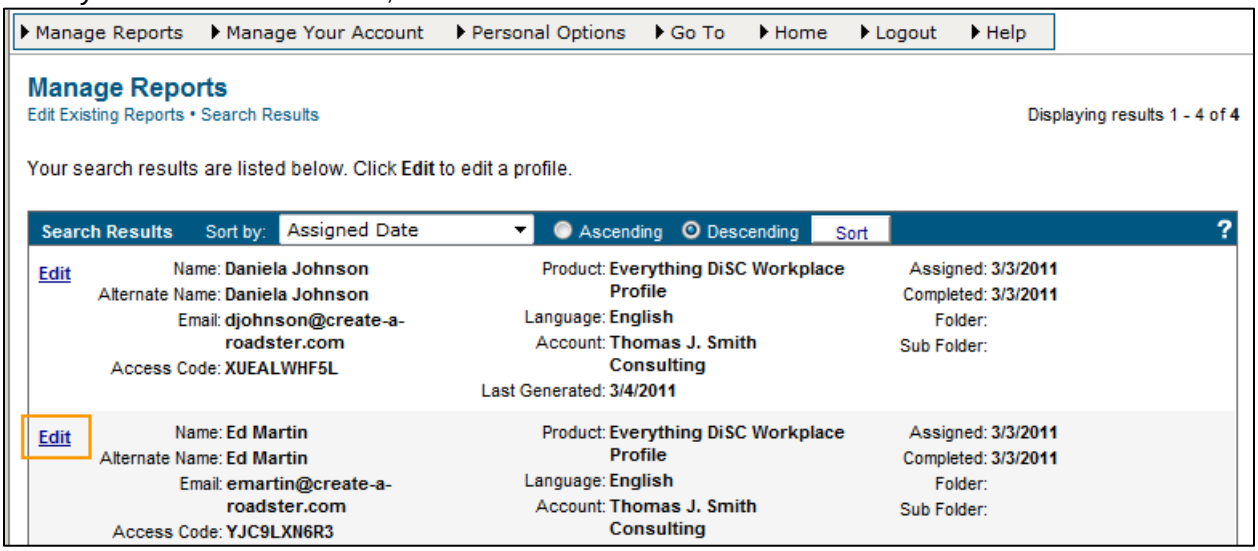
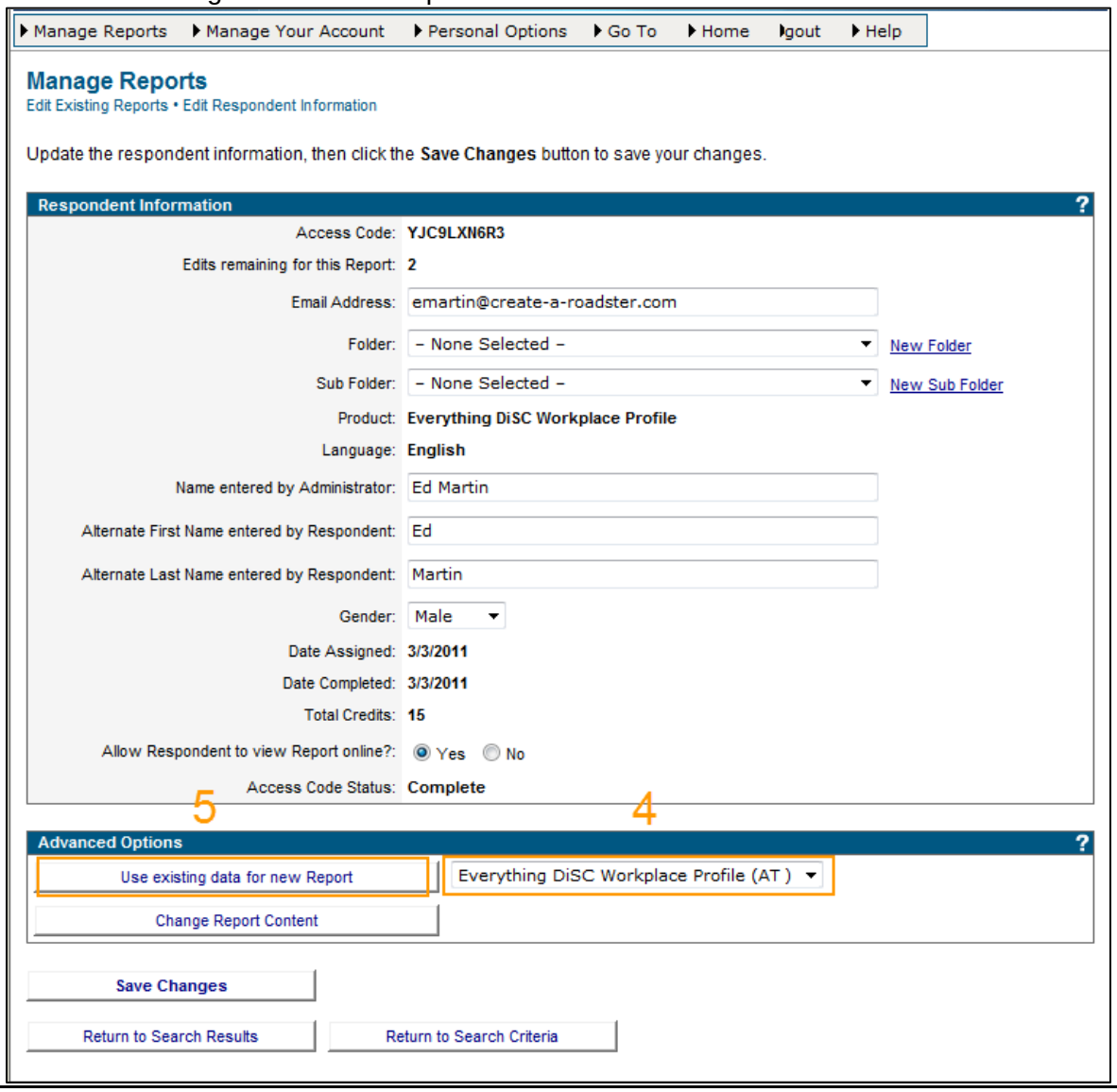
3. Once you've found the record, select Edit



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.



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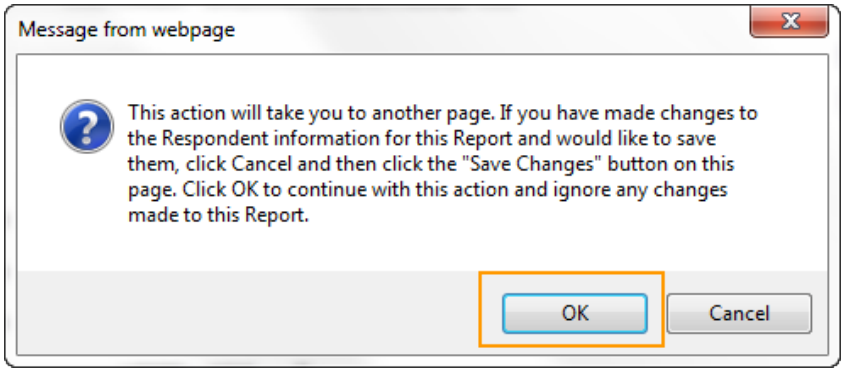
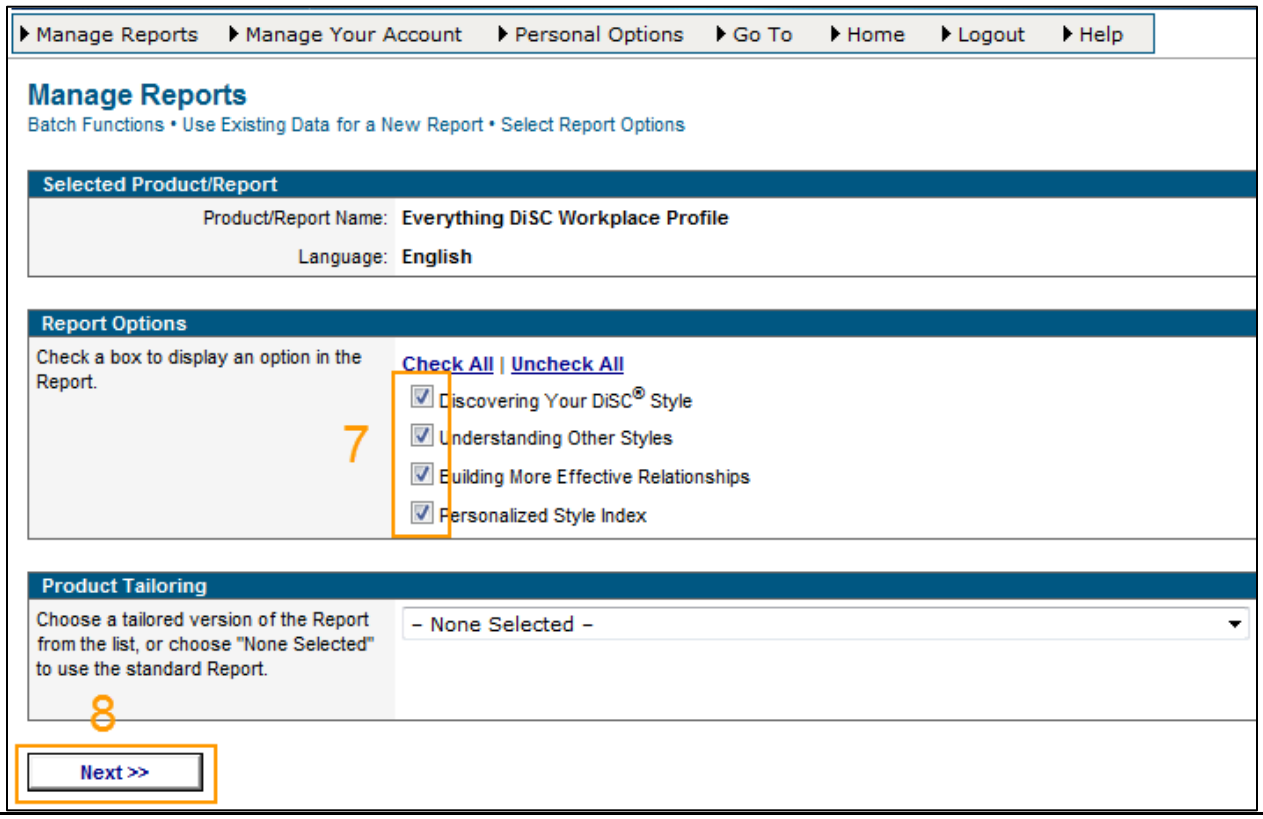
6. Click OK to go to the assign access code page



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



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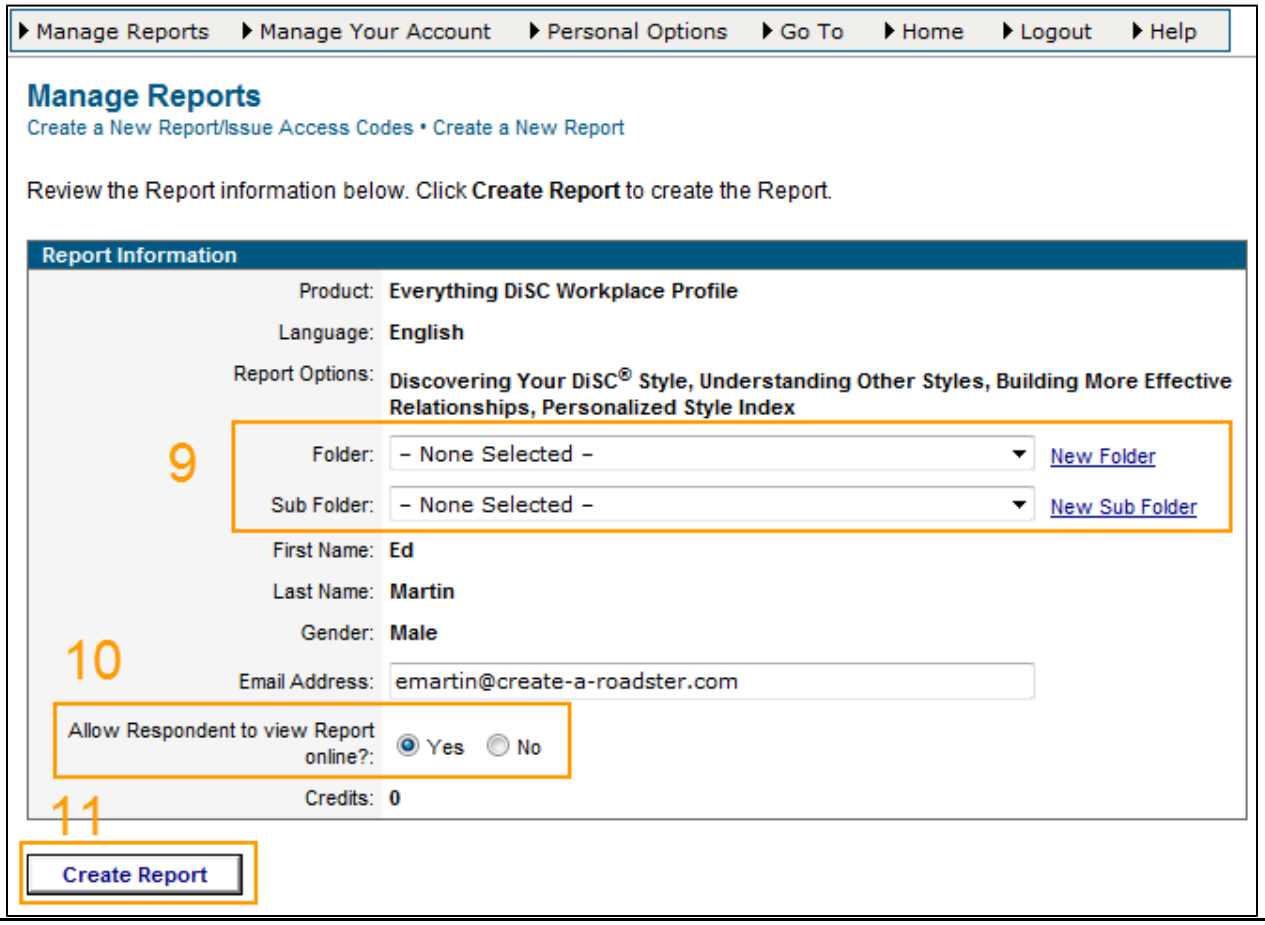
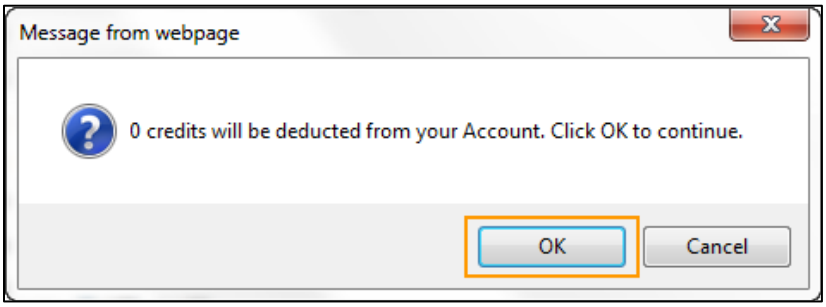
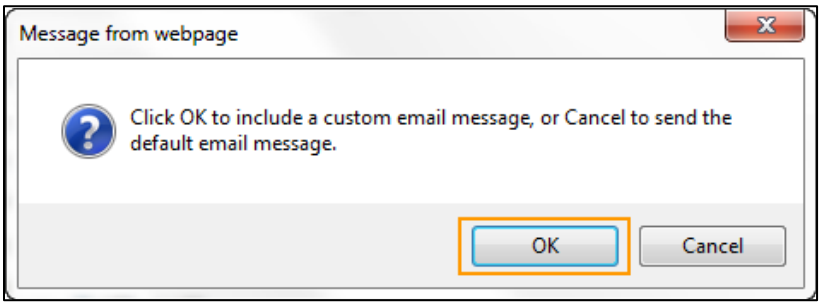
9. Assign Folder/Sub Folder (Optional)
10. Choose Viewing Option
11. Select Create Report



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



13. Choose OK to include a Custom Message



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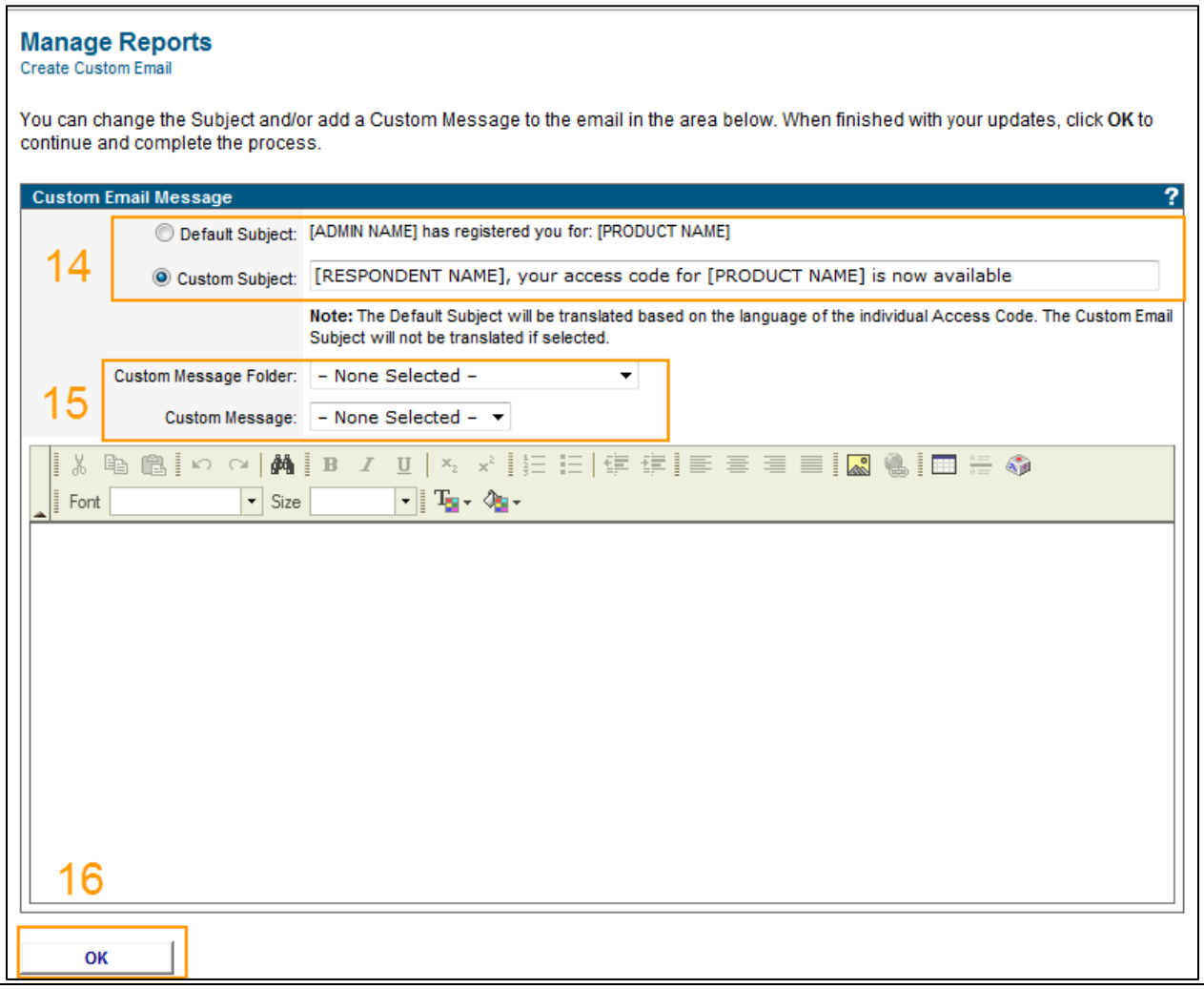
14. Choose Subject Line if creating Custom Subject Line (Optional)
15. Create Email Message or select from library
16. Click OK



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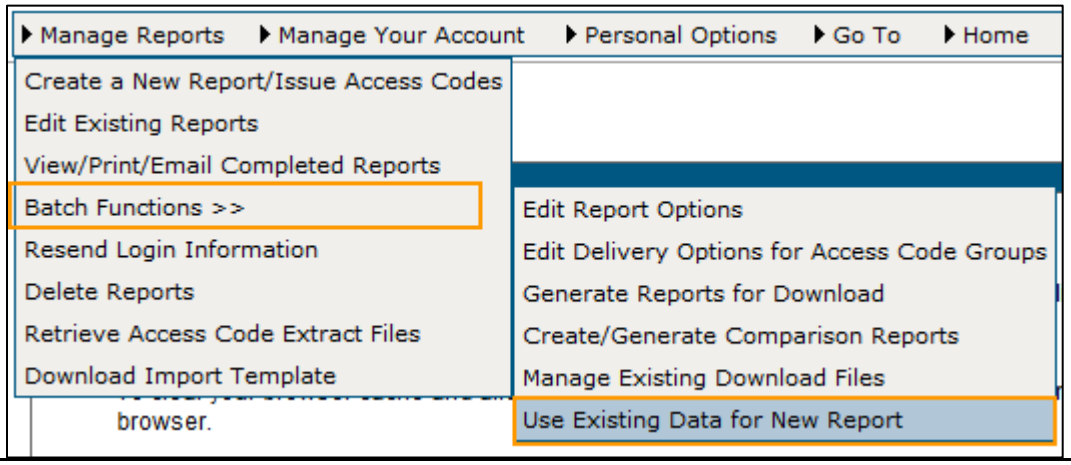
Instructions for upgrading 79-item Everything DiSC® Profiles to AT Everything DiSC Profiles
(Option to update *Workplace* begins 10/18/12, *Work of Leaders* on 1/3/13, *Management* on 10/31/13)

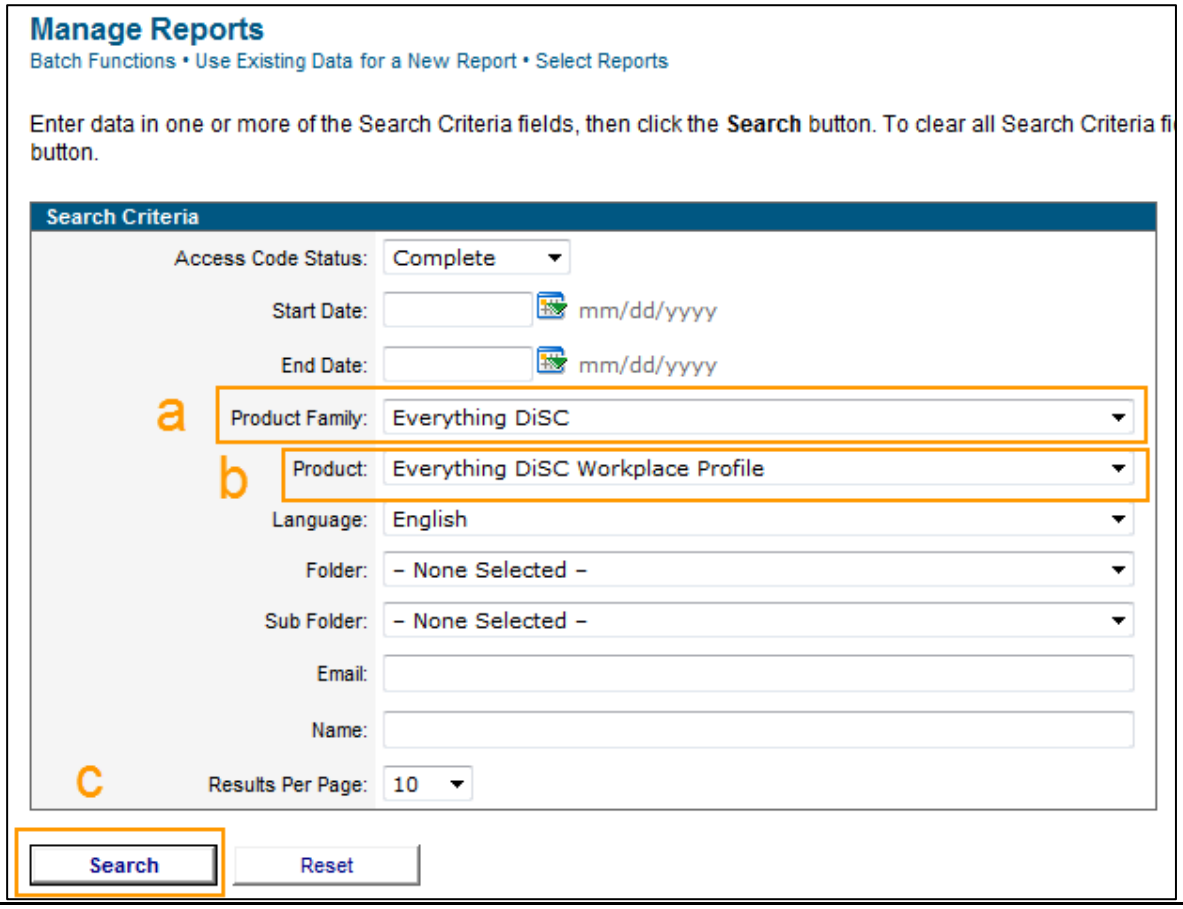
Use this process to work with many *Everything DiSC Profiles* at one time. (Batch)
(See page 1 for instructions when working with one record at a time.)

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.



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



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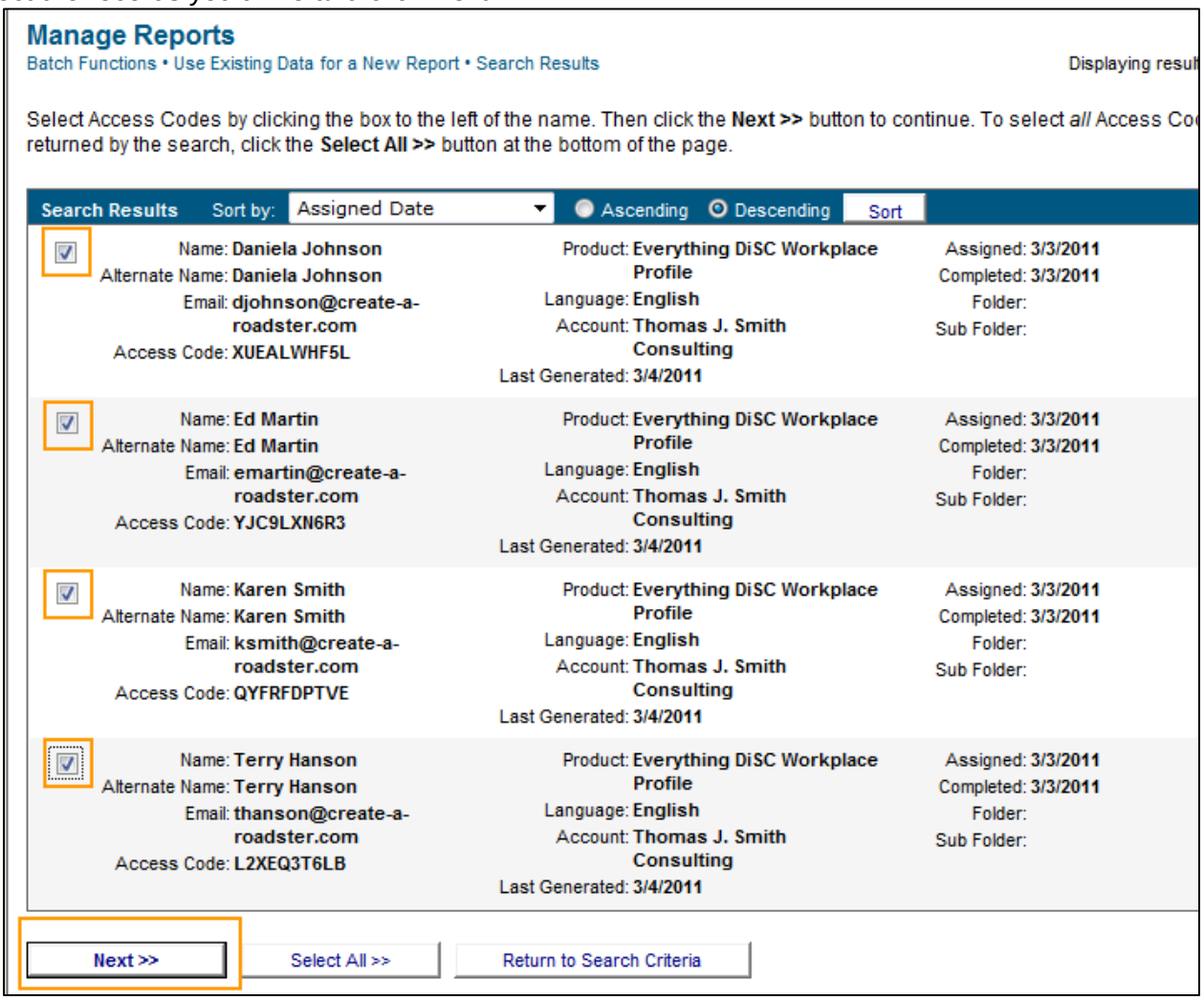
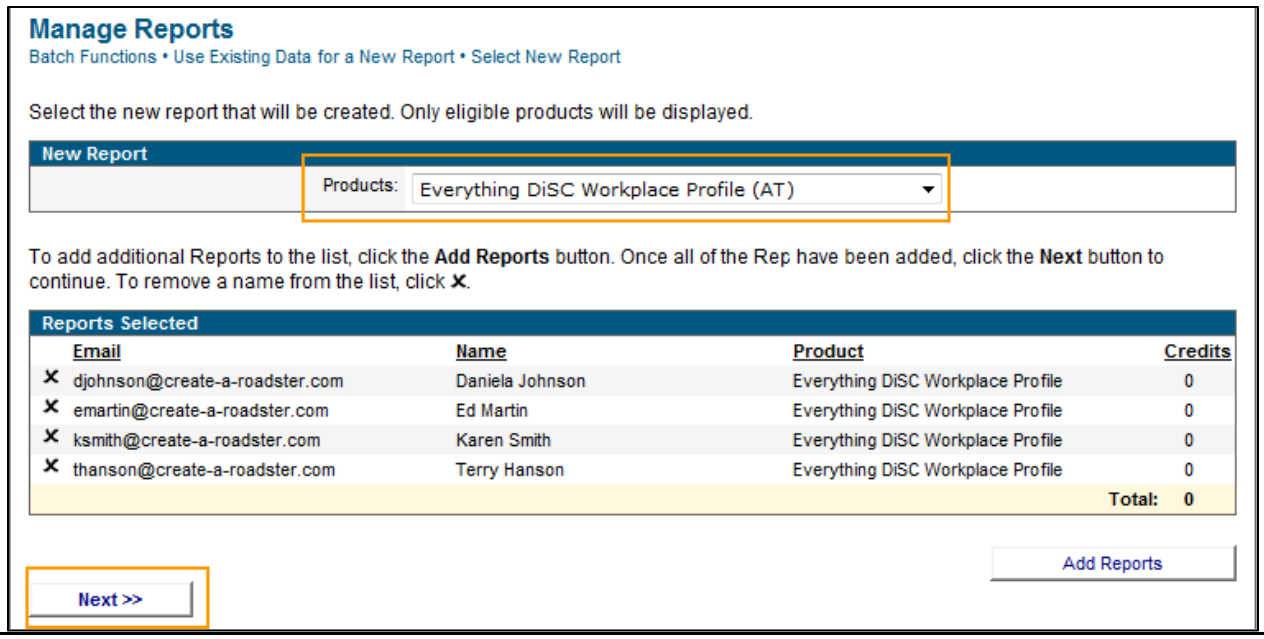
3. Select the records you'd like and click Next.



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



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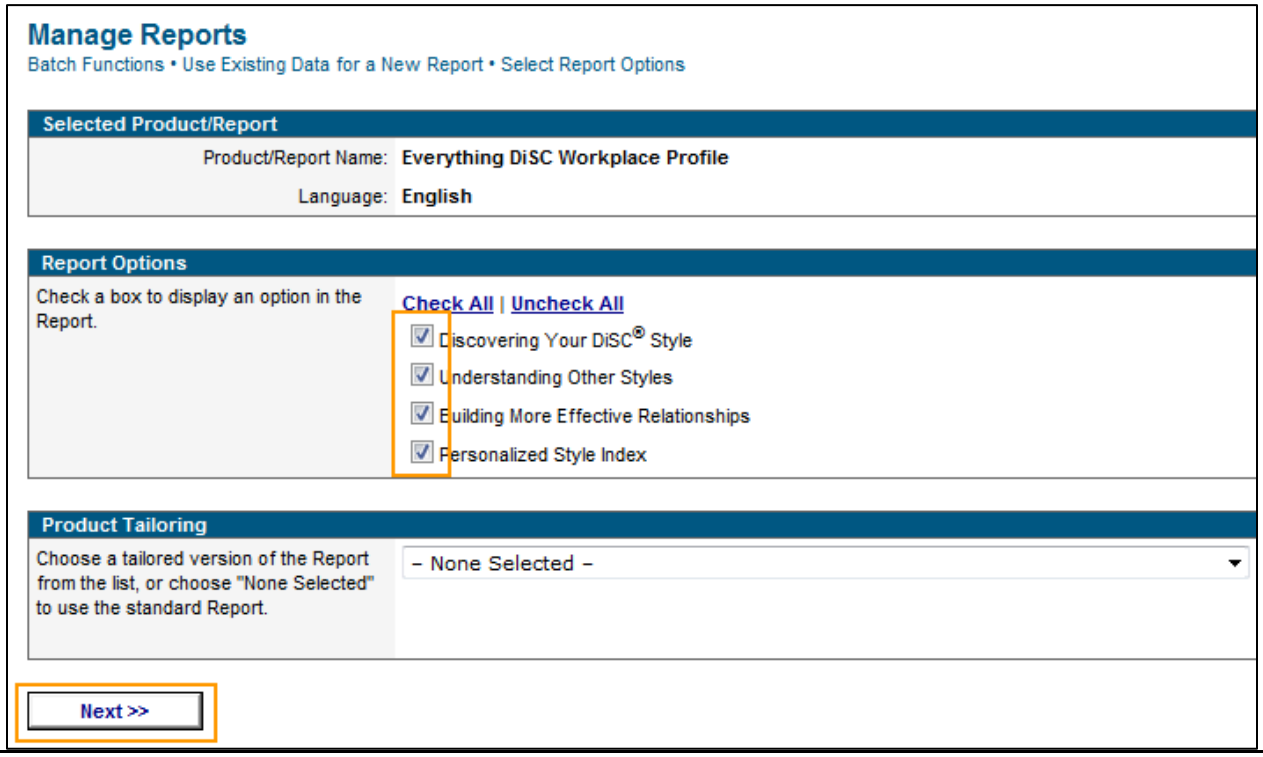
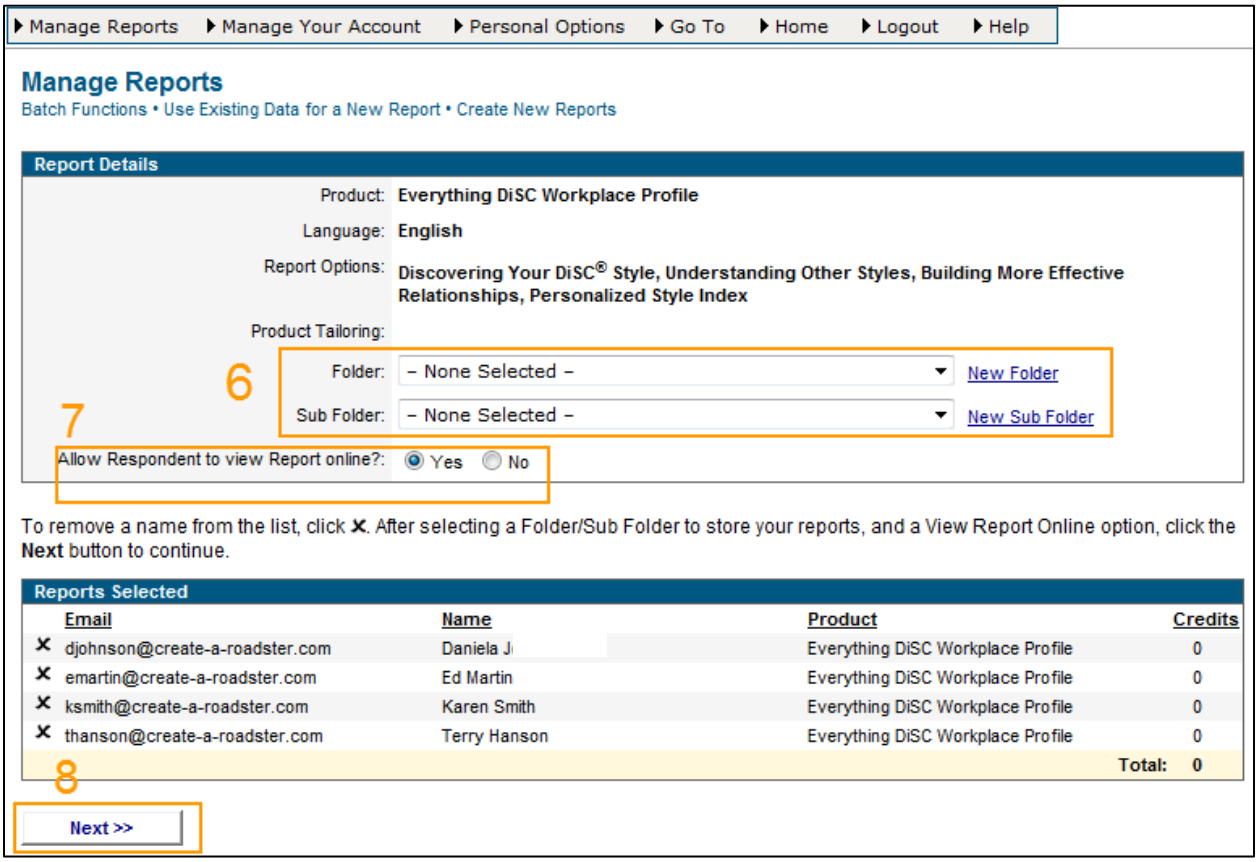
5. Select your Report Options (these options will be different for each *Everything DiSC Profile*)



6. Assign Folder/Sub Folder (Optional)
7. Choose Viewing Option
8. Click Next



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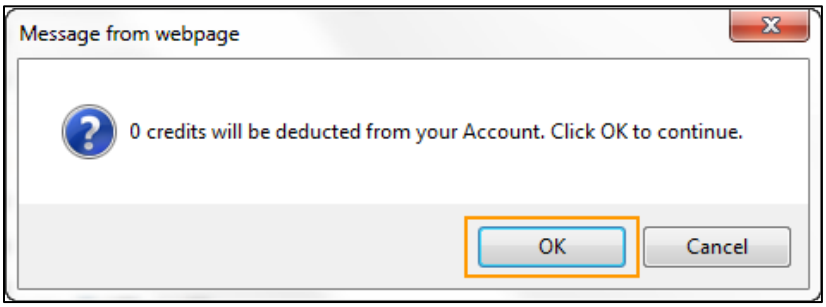
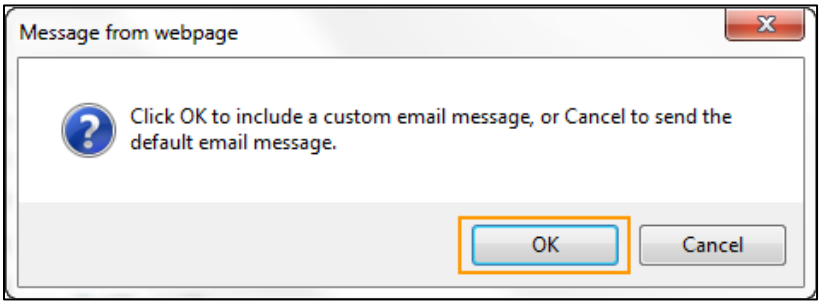
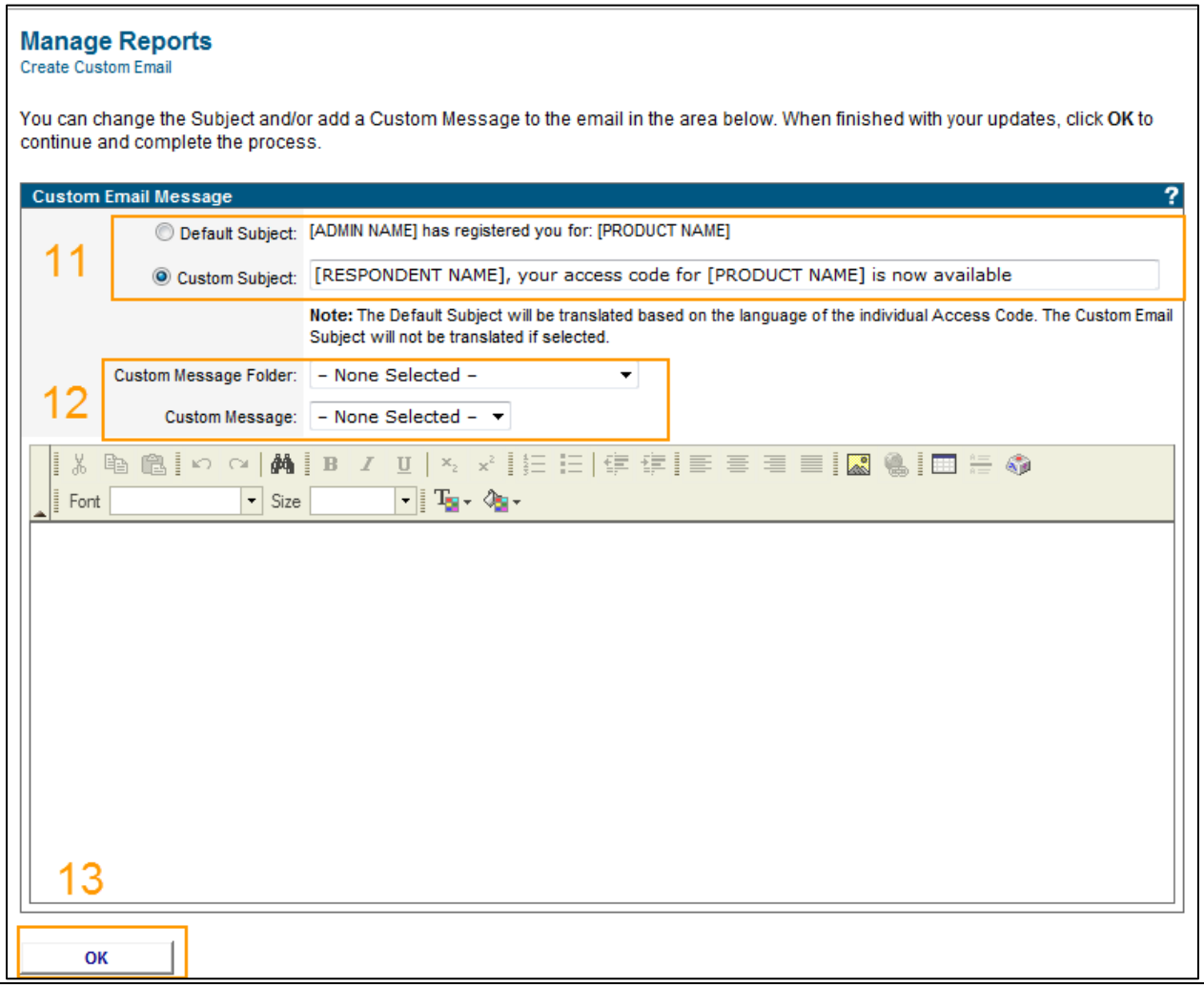
9. Click OK to accept the EPIC credit charge. (Zero credits)



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



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