

EPIC: Editing Batch Report Options

Editing Batch Reports are for the editing of multiple reports that need the exact same edits. Reasons to edit batch reports: setting reports to view online, product tailoring, adding/deleting MyEverythingDiSC options.

Programs/websites needed: EPIC

Editing an Existing Batch Reports:

1. Log into EPIC
2. On the left-hand side, drop down the arrow for "Manage Reports."
3. Click "Edit Report Options." (This is under sub-heading "Batch Functions.")
4. Select the product family, product, and language of the group's reports you'd like to edit.
5. Click NEXT.
6. You will have several options of edits here.
 - a. "Set View Report Online" – Set to Yes
 - b. "Apply Product Tailoring" – No change
 - c. "MyEverythingDiSC Options" – Enable
 - i. "My Comparisons" – Enable
 - ii. "My Style" – Enable
7. Click ADD REPORTS
8. On the Search Criteria page, select the folder/sub-folder containing the profiles you'd like to edit. Click SEARCH.
9. Check the boxes to the left of the profiles you'd like to edit. Then click NEXT. If you'd like to add them all, simply click SELECT ALL.
10. Scroll down and review the selected reports. To add more, click ADD REPORTS. If you are finished, click UPDATE REPORT OPTIONS.
11. A pop-up box will appear asking if you'd like to include a custom message. Clicking OK will allow you to send a custom message. Clicking CANCEL will send a default message. Click OK or CANCEL.
12. If you clicked CANCEL, emails will be sent.
13. If you clicked OK, choose either the Default Subject or create a custom subject.
14. Enter in your custom email in the Message box.
15. Click OK.