EPIC: Editing an Existing Individual Report

Reasons an individual report may need to be edited include: folder or sub-folder change, name change either by the Administrator or respondent, email address change, the option to view the report online.

Programs/websites needed: EPIC

Editing an Existing Individual Report:
1. Log into EPIC
2. On the left-hand side, drop down the arrow for "Manage Reports."
3. Click "Edit Existing Reports."
4. In the Search Criteria box, search by individual's name.
5. Click SEARCH
6. Click the EDIT button beside the report you wish to edit.
7. In the "Respondent Information" box, change the field(s) that require it.
8. For "Advanced Options," see below.
9. Once you are finished, click SAVE CHANGES.
10. A green ribbon will appear at the top confirming your changes have been saved.
11. You may now either exit, view the report, edit the report again, or return to search criteria.

Advanced Options:
1. This will take you to a different screen, so first, make sure all changes have been made and saved in the previous screen. (If they have not, you will need to do the above first. Save and go back into the "Edit Existing Reports.")
2. This screen allows you to change any of the report content by checking or unchecking content boxes. (This is rarely done at Group Dynamic.)
3. Advanced Options also allows you to edit the individual's options for MyEverythingDiSC, by adding or deleting access, or by adding or deleting My Comparisons or My Style. (See Also "Adding MyEverythingDiSC Options."
4. Click SAVE.
5. A green ribbon will appear at the top confirming your changes have been saved.
6. You may now either exit, view the report, edit the report again, or return to the search criteria.