

EPIC: Creating a Facilitator Report

Facilitator reports combine team members into one report that is used to facilitate the session.
Facilitator reports are 25 EPIC credits each.

Programs/websites needed: EPIC

Assigning Codes in EPIC:

1. Log into EPIC
2. On the left-hand side, drop down the arrow for “Manage Reports.”
3. Click “Create New Report/Issue Access Codes.”
4. In the box under Product Family, select “Everything DiSC.”
5. In the box under Product, select “Everything DiSC Facilitator Report.”
6. The language box will automatically change to English.
7. Click NEXT.
8. Under Report Details, select the correct folder or create a new one. (See EPIC: Assigning and Creating Folders and Sub-Folders.)
9. Select also the correct sub-folder or create a new one. If it makes sense to skip the sub-folder, then skip it.
10. Under Report Name, create a name for the report. Generally, it’s the name of the company, team name, and date. For example: DuPont Pioneer Ag Seed Distribution May 2017.
11. Add participants by clicking on the “Add” button.
12. This will bring up a search criteria page. You can search individually by name or by group using folders and sub-folders. If this is an intact team, use folders and sub-folders.
13. Click SEARCH
14. Check the boxes of those you want to include in the report.
15. Click NEXT.
16. Review your selections and/or add more participants if necessary.
17. Once finished adding names, click the bottom button, “NEXT.”
18. A pop-up box will appear to confirm the number of credits being deducted from your account. Click OK.
19. Generating the report may take a minute or two.
20. A green box will appear at the top stating that the action you requested has been completed.
21. Box at the bottom of the page will ask if you want the report, poster, or both. Choose both. (Even if you don’t use the poster, it’s nice to see what it is.)
22. Click VIEW REPORT at the bottom of the page.
23. The next page gives you three options: View, Save, and Email.
 - View Report: This simply allows you to view the report online.
 - Save Report: This will open the report and save a PDF copy to your hard drive.
 - Email Report: This will give you the option to email the report directly to someone.
24. Most often, you will click “Save” to save the documents to your computer.
25. Once on your hard drive, delete all extra letters and numbers, if you want a cleaner look.