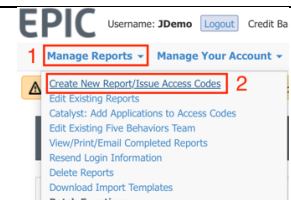


Job Aid Creating Group Reports

To Begin

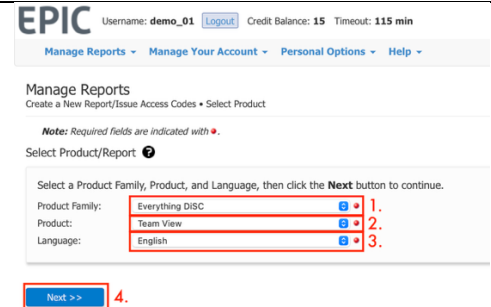
1. Under the Manage Reports Menu
2. Select Create New Report/Issue Access Code



Choose Selections from 3 drop down menus

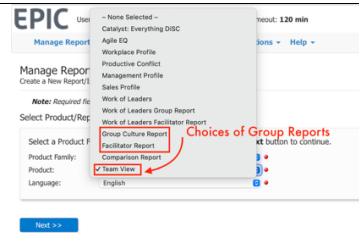
This Example is providing a Everything DiSC® Team View Report

1. Select Product Family - Everything DiSC
2. Select Product - Facilitator, Group Culture or Team View
3. Select Language - Defaults to English
4. Click Next>> button



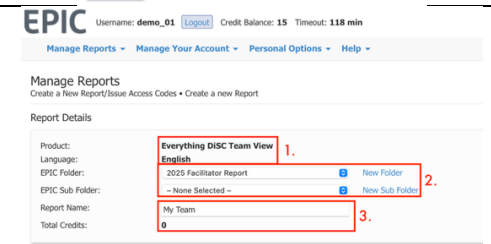
Note the 3 Group Report Options in the Product Drop Down

1. There are 3 Group Report Options
2. 25 Credit Charge for the Facilitator and Group Culture
3. 0 Credit Charge for Team View



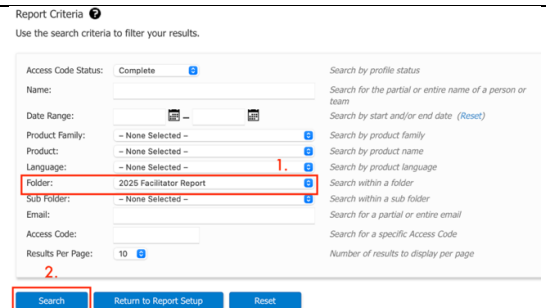
Identify Where Your Report Will Be Filed (top part of page)

1. Note Selections to this point
2. Create or choose where to file the Report
3. Enter a Name for the Report and see Credit Cost for Report



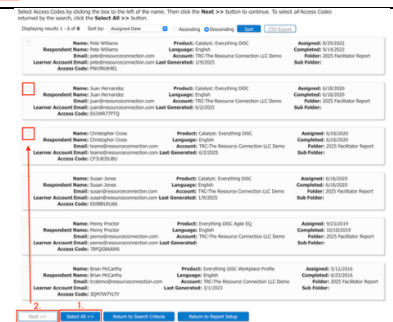
Adding your Learners to include in the Report (bottom part of page)

1. Click the Add button Then Enter Search Criteria (the folder where most are filed is often best)
2. Click Search Button



From the Search Results

1. If your search produced most of your learners use the Select All>> button
2. If not all are required, select the check box next to each needed for the report and click the Next>> button



Job Aid Creating Group Reports

Review

1. Review list of learners added
2. If learners are missing, click Add button and search for additional learners to include in the report.
3. Once your list of learners is complete click the Next>> button

Participants 0

Add 2.

Email	Name	Product
✖ pete@resourceconnection.com	Pete Williams	Catalyst: Everything DiSC (English)
✖ juan@resourceconnection.com	Juan Hernandez	Catalyst: Everything DiSC (English)
✖ teams@resourceconnection.com	Christopher Cross	Catalyst: Everything DiSC (English)
✖ susan@resourceconnection.com	Susan Jones	Catalyst: Everything DiSC (English)
✖ penny@resourceconnection.com	Penny Proctor	Everything DiSC Agile EQ (English)
✖ trodmo@resourceconnection.com	Brian McCarthy	Everything DiSC Workplace Profile (English)

1.

3.

Next >> **Cancel**

Confirmation of Credits used

1. A pop-up window will display with credits being used for this report Click OK

0 credits will be deducted from your Account. Click OK to continue.

Cancel **OK**

Confirmation of Report Generated

1. Your Report is Ready! Click the View Report button

Manage Reports
Create a New Report/Issue Access Codes • Create a new Report

The action you requested has been completed.
Click **Show/Hide Report Participants** to see the report participants.

Report Details

Access Code:	HEANXJ7Q8
Product:	Everything DiSC Team View
Language:	English
Folder:	
Sub Folder:	
Report Name:	
Created:	6/30/2025
Total Credits:	0

Report Participants

☒ Show/Hide Report Participants

1.

View Report **Create another Report**

Access Your Report

1. Use one or any combination of the options available to Access your Report.

Manage Reports
View/Print/Email Completed Reports • Report Generated

Your report has been generated.

Everything DiSC Team View

View **Save** **Email** 1.

