

Report Tailoring - Change Report Cover

Once a product is selected for tailoring, the entire Create Tailored Report screen is displayed. The screen is divided into two parts. The top section is used to identify your report and customize the name that appears on the cover.

The screenshot shows the 'Create Tailored Report' interface. It features a blue header bar with the text 'Create Tailored Report' and a question mark icon. Below the header, there are several input fields and options:

- Product Family:** A dropdown menu showing 'Everything DiSC'.
- Product:** A dropdown menu showing 'Everything DiSC Workplace Profile'.
- Language:** A dropdown menu showing 'English'.
- File Name:** A text input field containing 'ABC OnBoarding'.
- Program Name Options:** Two radio button options. The first is 'Use default Program Name: WORKPLACE PROFILE'. The second is 'Use custom Program Name: ABC New Hire Orientation', which is selected.
- View Report Cover:** Two links: 'Color Report Cover' and 'Black/White Report Cover'.
- Description:** A text input field at the bottom.

Assign a **File Name** to the profile. The File Name is used to help identify your tailored report in your EPIC account. **Note:** This field is limited to 45 characters and is not displayed on the report.

The system defaults to using the Program Name (in this case: Workplace Profile.) Click on the **custom Program Name** circle to create a customized title. Respondents will see the program name on the splash page when completing online responses **and** on the front page of their personal profiles.

Use the **Custom Program Name** text box to enter your new program name.

Note: Although the space in this text box allows for an unlimited number of characters, the space allocated on the report cover for your title is limited to 100 characters. If you enter a long name, it may be truncated on the report cover.

Click on one of the **View Report Cover** links to determine how the text you entered fits on the report.

Use the **Description** area to enter additional background information on your tailored profile. This information is **not** displayed on the profile.

If you only intend to change the report cover, then click **Save** at the bottom of the screen. Otherwise, continue to Report Tailoring - Rearrange and Delete Pages.