

How to Run Reports in EPIC Hyperspace: Create and Download a Team View Report

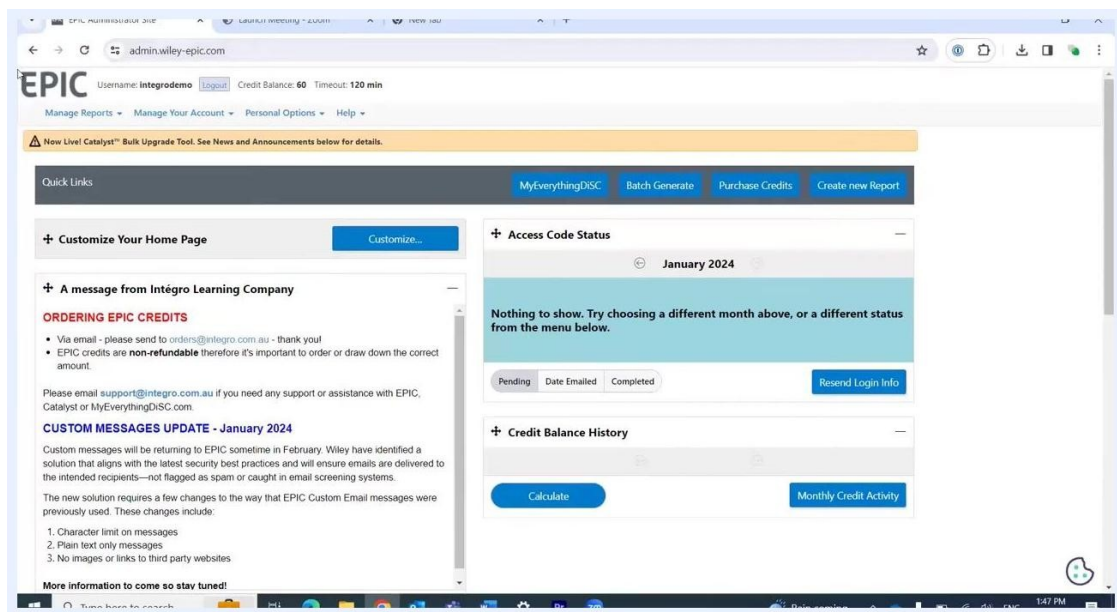
This guide shows you how to run reports in EPIC Hyperspace by walking through the full process of creating a Team View report, adding participants, and downloading the finished report from your EPIC Administrator account.

Prerequisites

- An active EPIC Administrator account.
- Access to admin.wiley-epic.com.
- Your administrator login credentials.

Step 1: Access the EPIC Administrator site

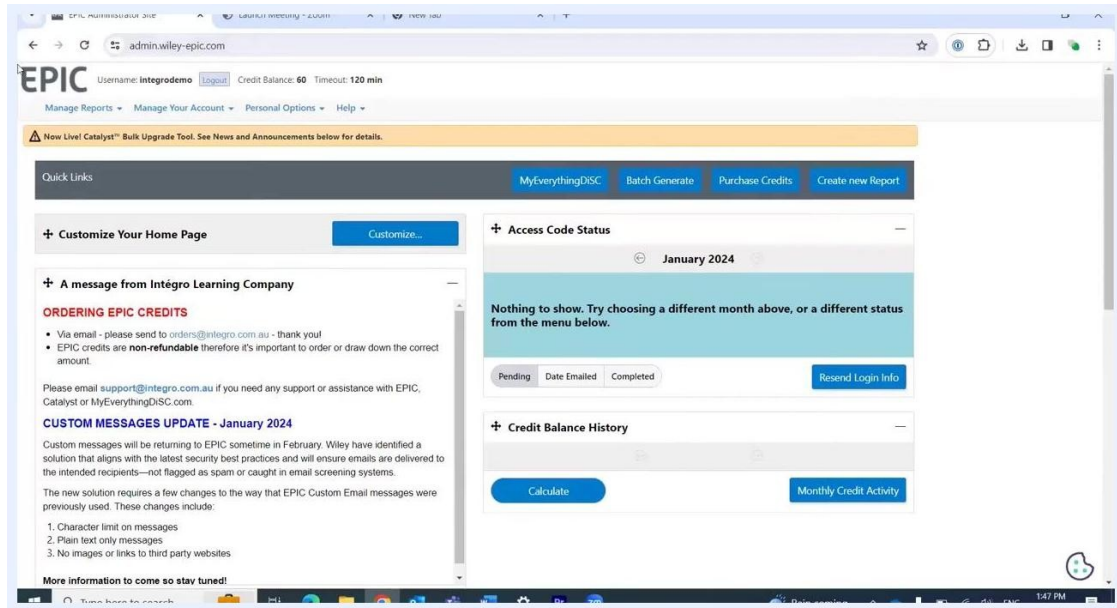
Open your web browser and navigate to admin.wiley-epic.com, then log in with your administrator credentials. Once logged in, confirm you are on the EPIC dashboard, where you can see your username, credit balance, and menu options.



EPIC dashboard showing username, credit balance, menu bar with "Manage Reports," "Manage Your Account," "Personal Options," and "Help." Quick links, access code status, and credit balance history are visible.

Step 2: Navigate to create new report

Hover over the Manage Reports menu at the top of the page. In the dropdown that appears, click Create New Report/Issue Access Codes to begin setting up your report.



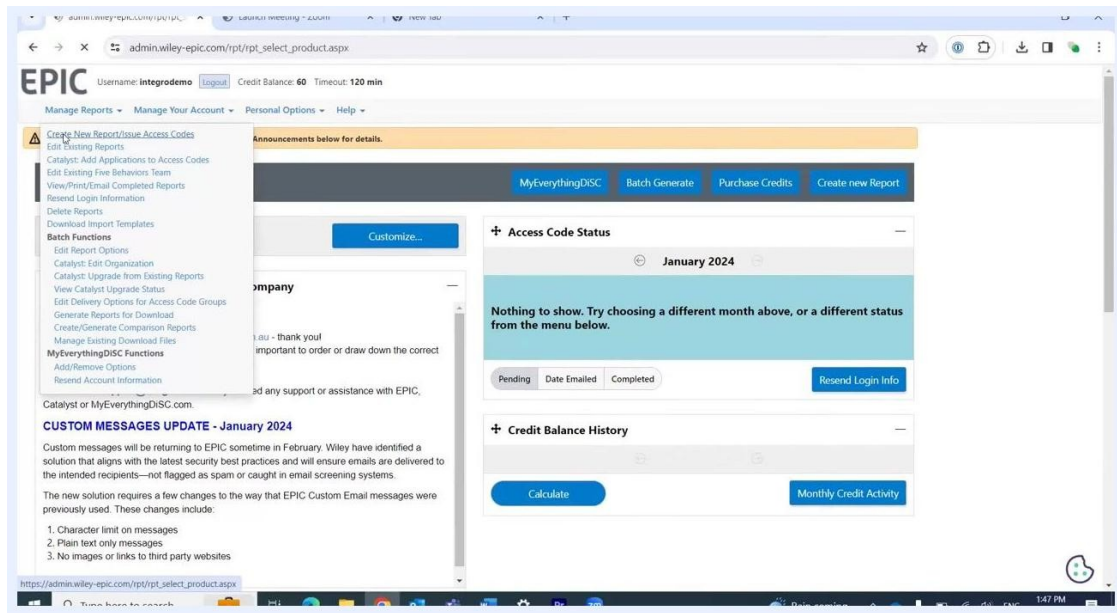
Dropdown menu under "Manage Reports" with "Create New Report/Issue Access Codes" highlighted.

Step 3: Select the product family and report type

On the Manage Reports page, locate the section for selecting a Product Family, Product, and Language.

- Set Product Family to [Everything DiSC](#).
- In the Product dropdown, scroll past the profile options and select a report type. For this guide, choose [Team View](#).

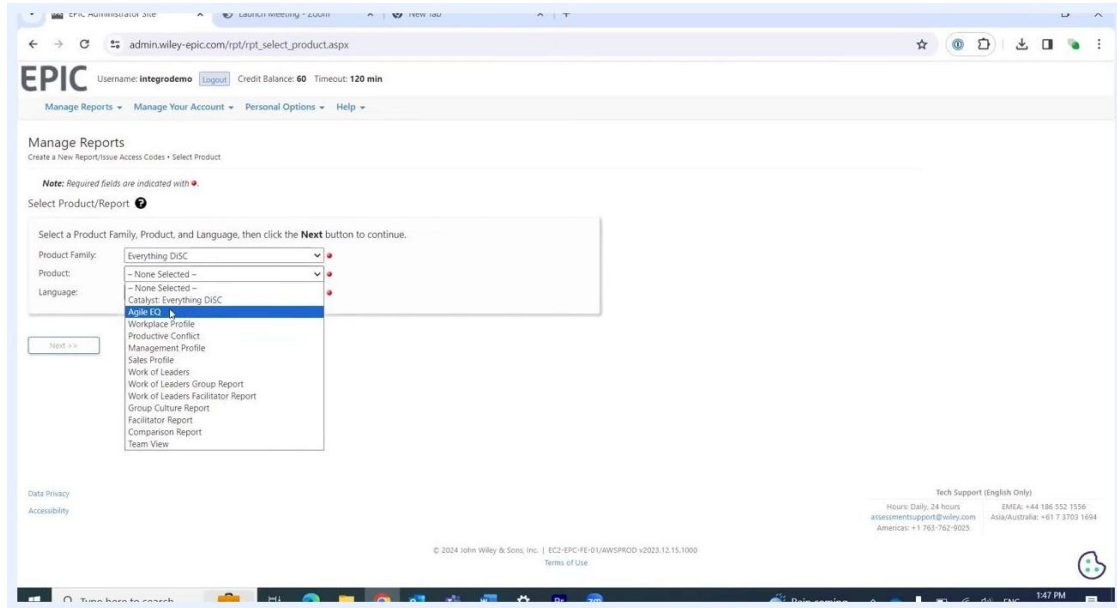
- Leave Language as required (for example, English).



Manage Reports screen with "Everything DiSC" selected as Product Family and the Product dropdown open, showing report options like Group Culture Report, Facilitator Report, Comparison Report, and Team View.

Step 4: Proceed to the next step

After selecting **Team View** as the product, click the Next button to continue to the report details.

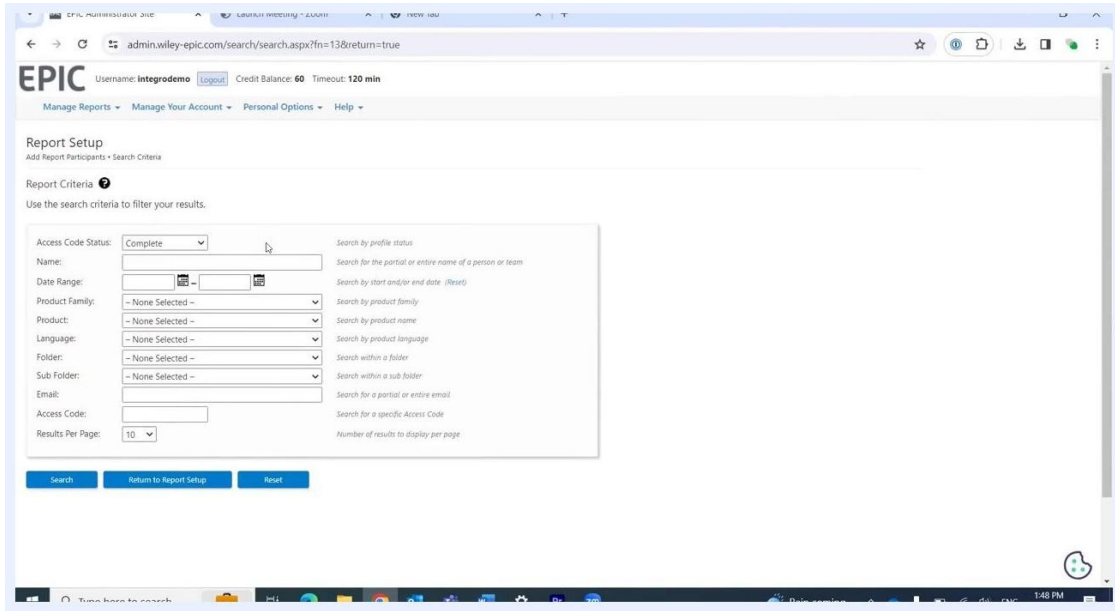


The screenshot shows the EPIC web application interface. At the top, the user is logged in as 'integrodemo' with a credit balance of 60 and a timeout of 120 minutes. The main heading is 'Manage Reports' with a sub-link 'Create a New Report/Issue Access Codes • Select Product'. A note states: 'Note: Required fields are indicated with *'. Below this, the 'Select Product/Report' section contains three dropdown menus: 'Product Family' (set to 'Everything DiSC'), 'Product' (set to '- None Selected -'), and 'Language' (set to '- None Selected -'). A 'Next >>' button is located below the dropdowns. The 'Product' dropdown menu is open, displaying a list of options: 'Everything DiSC', 'Workplace Profile', 'Productive Conflict', 'Management Profile', 'Sales Profile', 'Work of Leaders', 'Work of Leaders Group Report', 'Work of Leaders Facilitator Report', 'Group Culture Report', 'Facilitator Report', 'Comparison Report', and 'Team View'. The 'Team View' option is highlighted. At the bottom of the page, there is a footer with copyright information and contact details for Tech Support.

Manage Reports screen with Product Family set to "Everything DiSC," Product set to "Team View," and Language not yet selected.

Step 5: Assign folders and name the report

On the Report Details screen, select an EPIC Folder (for example, [Integro Demonstration](#)) and an EPIC Sub Folder (for example, [2012 Participants](#)). You can also create a new folder or subfolder if needed. This organization helps you easily find and download reports in the future.



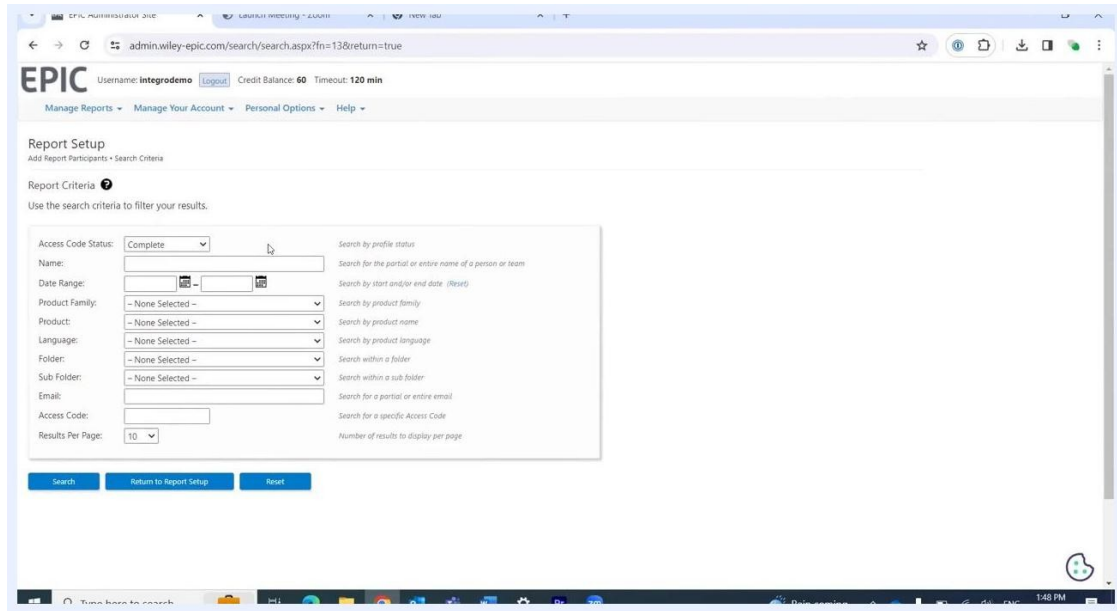
The screenshot shows the EPIC web application interface. The browser address bar displays `admin.wiley-epic.com/search/search.aspx?fn=13&return=true`. The page header includes the EPIC logo, a username of `integrodemo`, a credit balance of `60`, and a timeout of `120 min`. Below the header is a navigation bar with links for `Manage Reports`, `Manage Your Account`, `Personal Options`, and `Help`. The main content area is titled `Report Setup` and includes a sub-header `Add Report Participants • Search Criteria`. A section titled `Report Criteria` with a help icon contains the instruction `Use the search criteria to filter your results.` Below this is a search form with the following fields and options:

- `Access Code Status:` A dropdown menu set to `Complete`.
- `Name:` A text input field.
- `Date Range:` Two date pickers.
- `Product Family:` A dropdown menu set to `None Selected`.
- `Product:` A dropdown menu set to `None Selected`.
- `Language:` A dropdown menu set to `None Selected`.
- `Folder:` A dropdown menu set to `None Selected`.
- `Sub Folder:` A dropdown menu set to `None Selected`.
- `Email:` A text input field.
- `Access Code:` A text input field.
- `Results Per Page:` A dropdown menu set to `10`.

To the right of the form, there are search filters with labels: `Search by profile status`, `Search for the partial or entire name of a person or team`, `Search by start and/or end date (Reset)`, `Search by product family`, `Search by product name`, `Search by product language`, `Search within a folder`, `Search within a sub folder`, `Search for a partial or entire email`, and `Search for a specific Access Code`. At the bottom of the form is a label `Number of results to display per page`. Below the form are three buttons: `Search`, `Return to Report Setup`, and `Save`. The bottom of the page shows a Windows taskbar with the time `1:48 PM`.

Report Details screen with Product set to "Everything DiSC Team View," Language "English," EPIC Folder "Integro Demonstration," EPIC Sub Folder "2012 Participants," and Report Name field ready for input.

Next, enter a Report Name in the provided field (for example, [Integrity](#)). Note that the main title "Team View" is added automatically to the finished report, so you don't need to repeat it in your custom name — choose something that helps you identify the team or department instead.

The screenshot shows the EPIC web application interface. At the top, the user is logged in as 'IntegroDemo' with a credit balance of 60 and a timeout of 120 minutes. The main section is titled 'Report Setup' with a sub-link 'Add Report Participants > Search Criteria'. Below this, a message states 'Use the search criteria to filter your results.' A search criteria form is displayed with various fields: 'Access Code Status' (set to 'Complete'), 'Name' (empty), 'Date Range' (empty), 'Product Family' (set to 'None Selected'), 'Product' (set to 'None Selected'), 'Language' (set to 'None Selected'), 'Folder' (set to 'None Selected'), 'Sub Folder' (set to 'None Selected'), 'Email' (empty), 'Access Code' (empty), and 'Results Per Page' (set to 10). To the right of these fields are search tips: 'Search by profile status', 'Search for the partial or entire name of a person or team', 'Search by start and/or end date. (Revs)', 'Search by product family', 'Search by product name', 'Search by product language', 'Search within a folder', 'Search within a sub folder', 'Search for a partial or entire email', and 'Search for a specific Access Code'. At the bottom of the form are three buttons: 'Search', 'Return to Report Setup', and 'Reset'.

Report Details screen with "Integrity" being typed into the Report Name field.

Step 6: Add participants to the report

Click the Add button under the Participants section to open the search window, where you can find people to include in your report.

Step 7: Set search criteria for participants

In the Report Setup window, use the search criteria to filter participants:

- Set Access Code Status to [Complete](#).
- Optionally enter a Name, or leave the field blank for a broader search.
- For a wide search, set the Date Range from a past date (for example, 14 years ago) to today.
- Filter further by Product Family, Product, Language, Folder, Sub Folder, Email, or Access Code as needed.

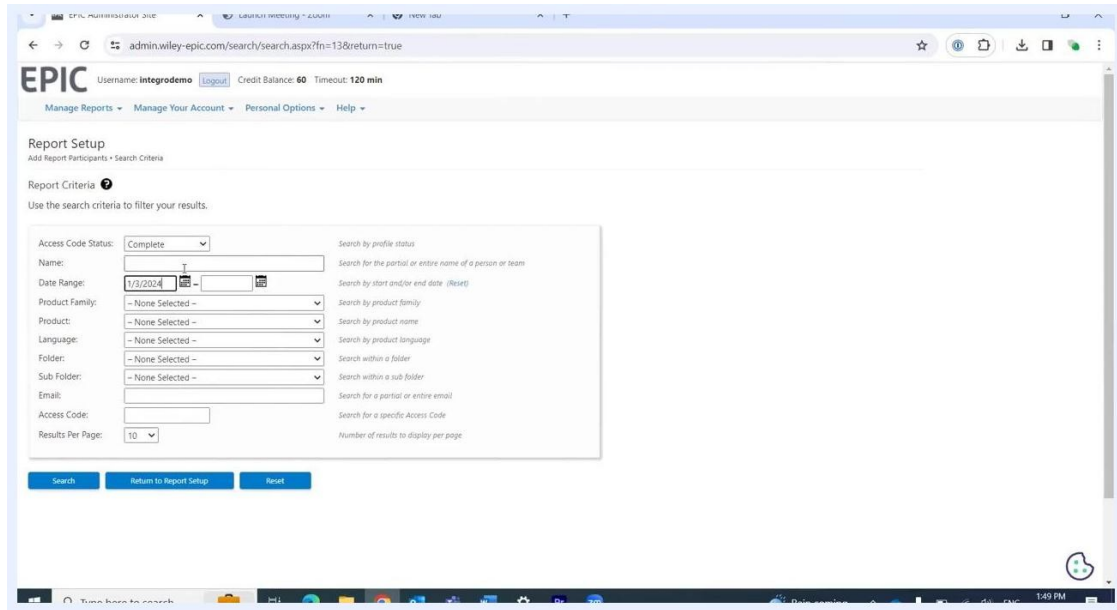
- Set Results Per Page as desired (the default is 10).

The screenshot shows the EPIC web application interface. At the top, the user is logged in as 'integrodemo' with a credit balance of 60 and a timeout of 120 minutes. The main heading is 'Report Setup' with a sub-link 'Add Report Participants > Search Criteria'. Below this, a section titled 'Report Criteria' instructs the user to 'Use the search criteria to filter your results.' A search criteria form is displayed with the following fields: 'Access Code Status' (set to 'Complete'), 'Name' (text input), 'Date Range' (calendar pickers), 'Product Family' (dropdown), 'Product' (dropdown), 'Language' (dropdown), 'Folder' (dropdown), 'Sub Folder' (dropdown), 'Email' (text input), 'Access Code' (text input), and 'Results Per Page' (set to 10). To the right of each field is a search scope hint, such as 'Search by profile status' for Access Code Status and 'Search for the partial or entire name of a person or team' for Name. At the bottom of the form are three buttons: 'Search', 'Return to Report Setup', and 'Reset'.

Report Setup screen with search criteria fields: Access Code Status set to "Complete," Date Range field being filled, and other filters available.

Step 8: Enter a date range for a wide search

In the Date Range field, enter a start date (for example, [1/3/2010](#)) and an end date (for example, today's date) to include all relevant participants from the past 14 years.

The screenshot shows the EPIC web application interface. At the top, the URL is 'admin.wiley-epic.com/search/search.aspx?fn=13&return=true'. The user is logged in as 'Integrodemo' with a credit balance of 60 and a timeout of 120 minutes. The 'Report Setup' section is active, showing 'Add Report Participants > Search Criteria'. The 'Report Criteria' section includes a dropdown for 'Access Code Status' set to 'Complete'. The 'Date Range' field is filled with '1/3/2024' as the start date and an empty field as the end date. Other fields like 'Name', 'Product Family', 'Product', 'Language', 'Folder', 'Sub Folder', 'Email', and 'Access Code' are all set to 'None Selected'. The 'Results Per Page' is set to 10. At the bottom, there are buttons for 'Search', 'Return to Report Setup', and 'Reset'.

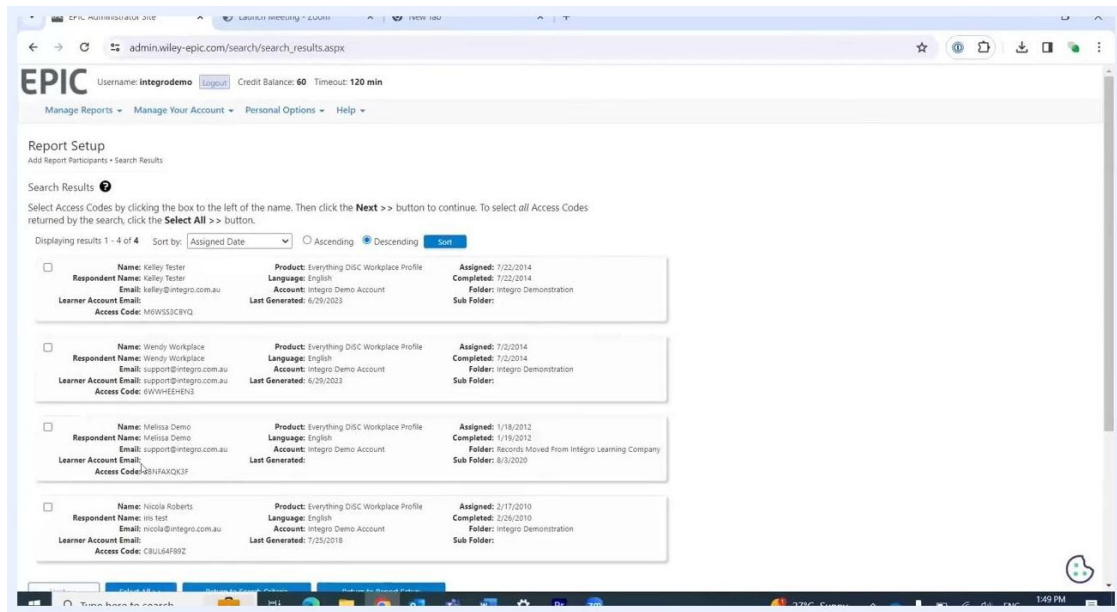
Report Setup screen with Date Range field being filled for a wide search, Access Code Status set to "Complete."

Step 9: Filter participants by product

In the Product dropdown, select [Workplace Profile](#) if you only want participants who completed this specific profile within your chosen date range. Confirm your search criteria are set as follows:

- Access Code Status: Complete
- Date Range: 1/3/2010 – 1/3/2024
- Product Family: Everything DiSC
- Product: Workplace Profile

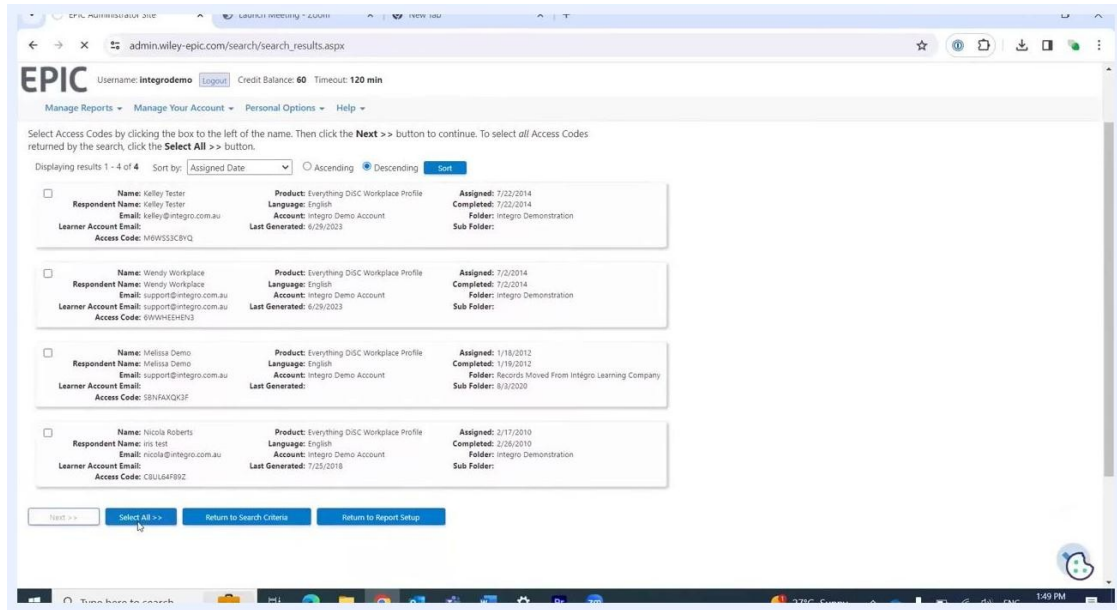
Other fields, such as Language, Folder, Sub Folder, Email, and Access Code, can remain blank unless further filtering is needed. Click the Search button to display matching participants.



Report Setup screen with Product set to "Workplace Profile," Access Code Status "Complete," Date Range "1/3/2010 – 1/3/2024," and other filters available.

Step 10: Select participants for the report

Review the list of participants returned by your search. You can select participants individually by checking the box next to each name, or click Select All >> to include everyone listed.



Search Results screen showing four participants with checkboxes, "Select All >>" button highlighted.

Step 11: Add selected participants to the report

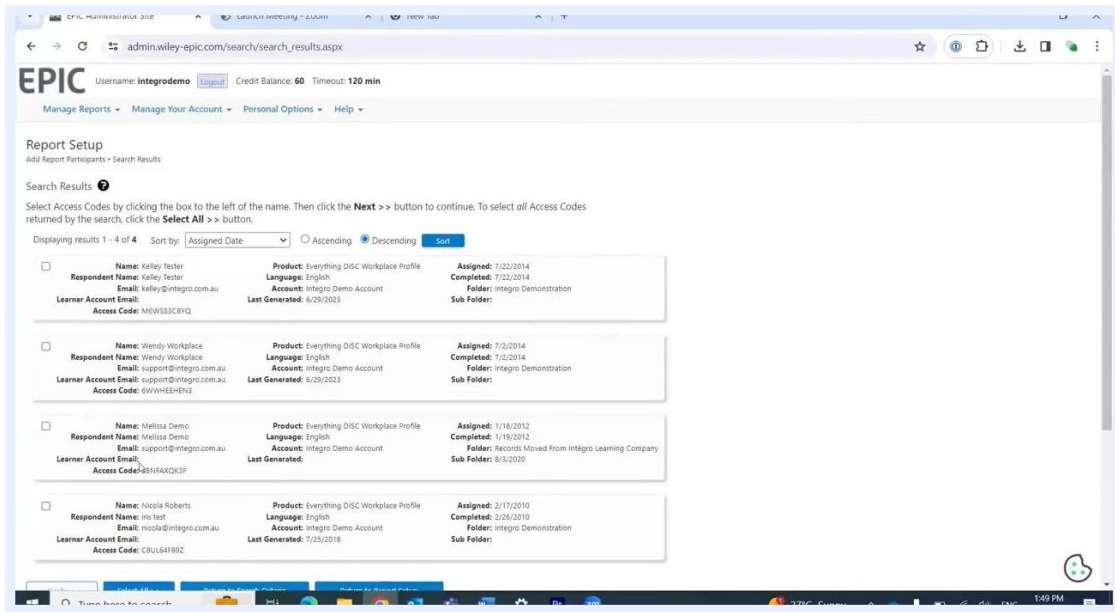
After selecting the desired participants, click the Next >> button to add them to your report.

Step 12: Review and edit the participant list

On the report setup screen, review the list of participants you have added.

- If you included someone by mistake, remove them by clicking the X next to their email address.

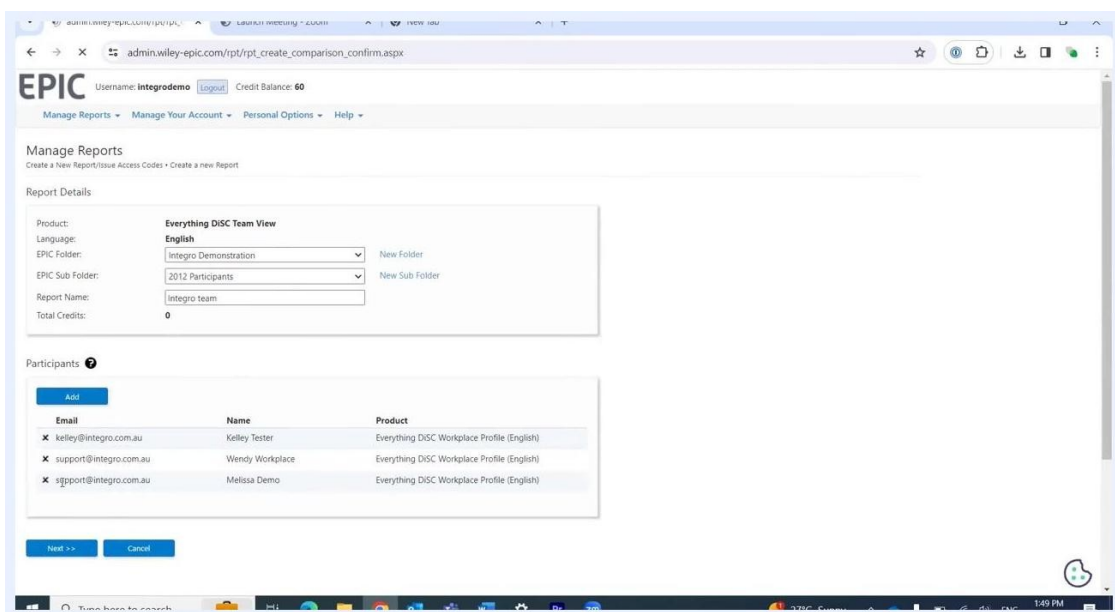
- If you forgot to add someone, click the Add button to return to the search and include additional participants.



Report Details screen showing participant list with option to remove (X) or add participants.

Step 13: Finalize the participant list

Once your participant list is accurate and complete, click the Next >> button to proceed.



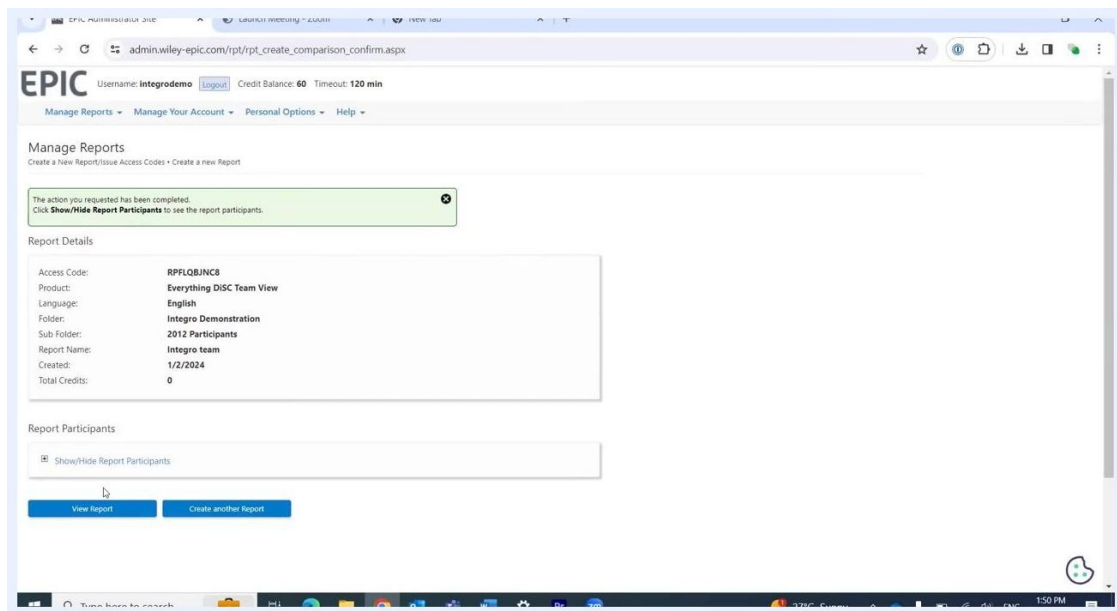
Report Details screen with finalized participant list and "Next >>" button.

Step 14: Review the report summary

Review the summary of your report, including:

- Access Code
- Product: Everything DiSC Team View
- Language: English
- Folder: Integro Demonstration
- Sub Folder: 2012 Participants
- Report Name: Integro team
- Created: 1/2/2024
- Total Credits: 0 (Team View reports do not use credits)

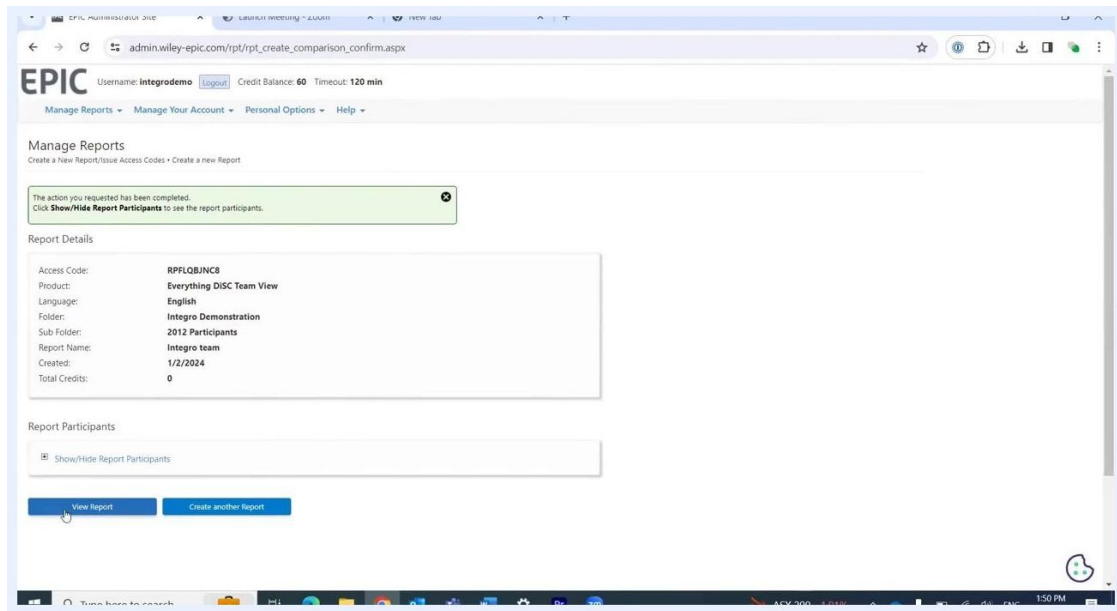
If you were generating a Facilitator or Group Culture report instead, a pop-up would appear to confirm the use of 25 credits before you reach this screen.



Report summary screen showing report details, access code, and total credits used (0).

Step 15: View or download the report

Click View Report to open the Team View report. You will have the option to view the report online, save it to your computer, or print it.



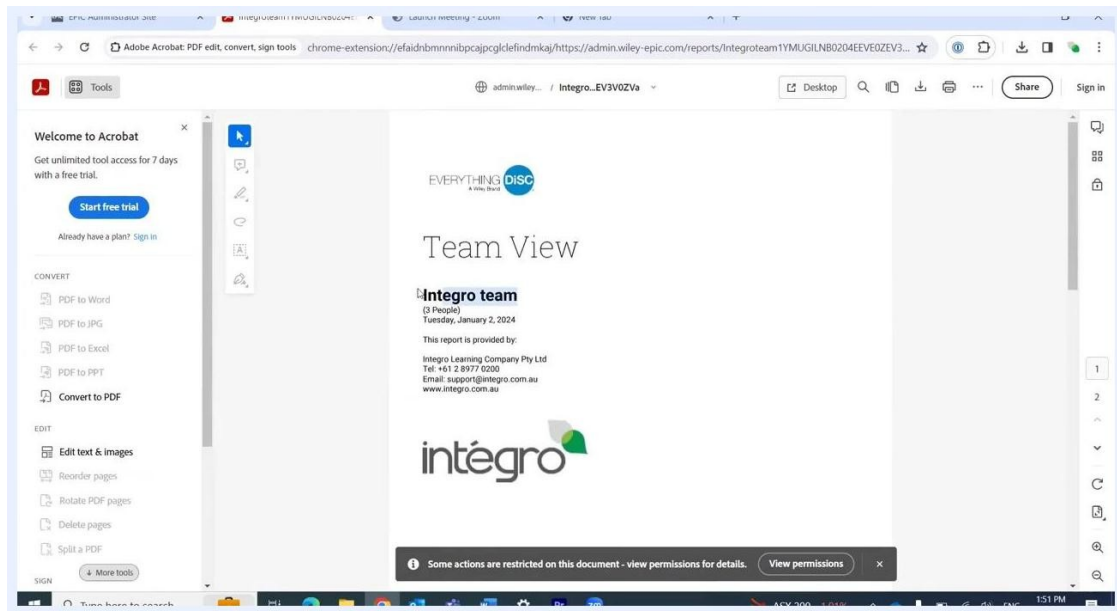
Report summary screen with "View Report" button highlighted.

Step 16: Open the generated report

After clicking View Report, a new browser tab or window opens displaying your completed Team View report as a PDF. You will see three main options for your report:

- View: Opens the report in your browser.
- Save: Downloads the report to your computer.
- Email: Sends the report via email.

Click View to open the report online.



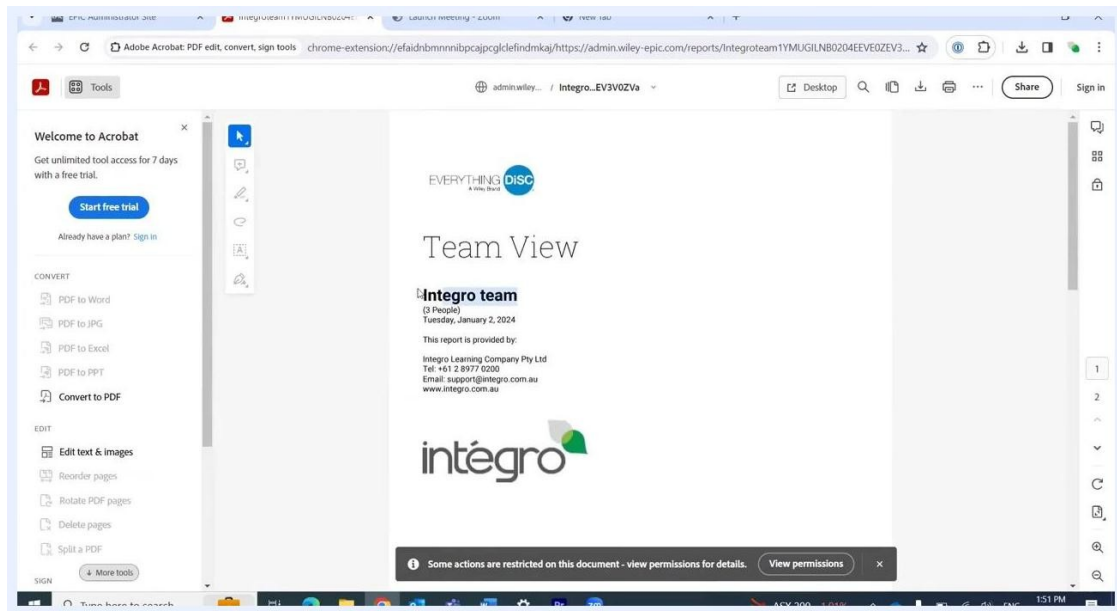
Manage Reports screen in EPIC showing Everything DiSC Team View report with options to View, Save, or Email. The cursor is clicking "View."

Step 17: Review the report title and details

In the new tab, review the cover page of your Team View report and confirm the following details:

- The main title reads Team View.
- Your assigned report name (for example, Integro team) appears under the title.
- The number of people included (for example, 3 People).
- The report creation date (for example, Tuesday, January 2, 2024).
- Provider information, including company name, phone number, email, and website.

- The company logo (for example, integro).



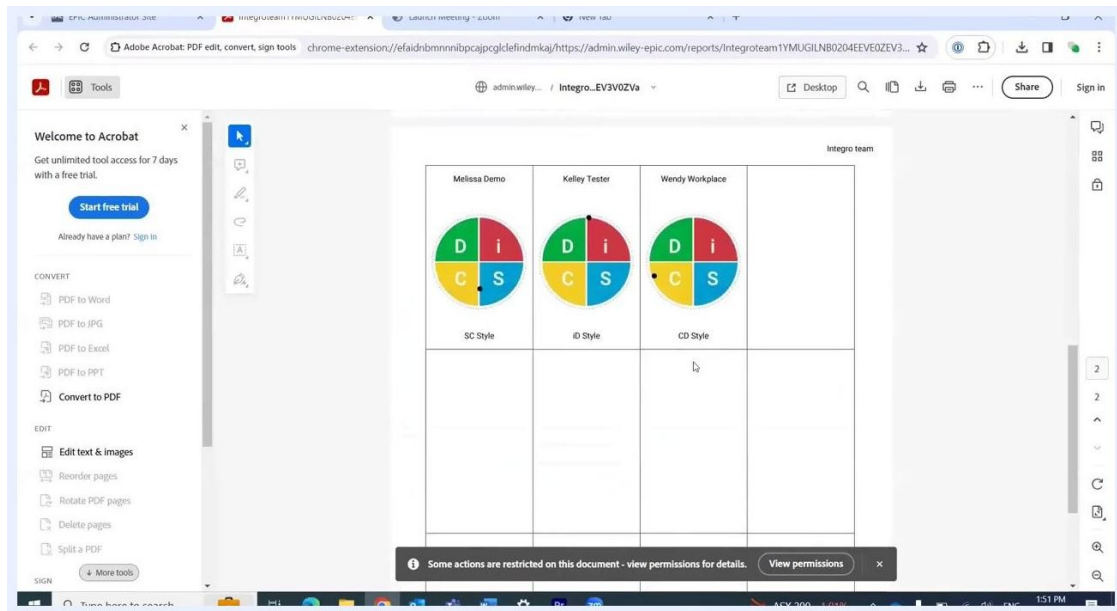
Adobe Acrobat online viewer displaying the Team View report cover page with report name, date, provider details, and logo.

Step 18: View team member DiSC styles

Scroll to the next page of the report to see a summary of the included team members and their DiSC styles. Each participant is listed with:

- Their name (for example, Melissa Demo, Kelley Tester, Wendy Workplace).
- Their DiSC style (for example, SC Style, iD Style, CD Style).
- A visual representation of their DiSC profile.

Use this summary to quickly understand the composition of your team.



Team View report page showing participant names, DiSC style wheels, and style labels for each team member.

What's next

You now know how to run reports in EPIC Hyperspace, from creating a Team View report and adding participants to reviewing and downloading the finished PDF. You can save, print, or email the report as needed, and use the included DiSC style information to support your team's or department's development.