

EPIC Account Batch Report Generation

Menu Location: Manage Reports>>Batch Functions>>Generate Reports for Download

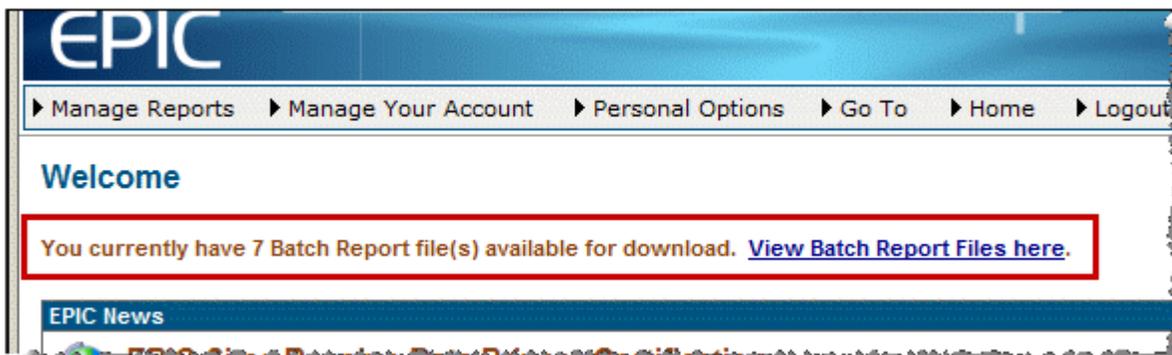
The Batch Report Generation functions allows you to generate a group of records in a single process and be notified via email when the batch is ready for download. This function does not print a batch of reports but does create a compressed or zipped file that can be downloaded to your PC. Once the file is downloaded, you can use the printing functions on your PC to print individual profiles or a group of profiles at one time.

Steps for Creating a Batch of Reports

1. Under Manage Reports>>Batch Functions, select Generate Reports for Download
2. From the Search screen, select the Product Family and Product for the report and enter other search criteria to help you locate the reports. Note: You can only select one type of Product/Profile in each batch. You cannot mix different products even though they are for the same person since the report options are different for each profile.
3. From the Search Results screen, select the profiles that you want to include in the batch.
4. Next, select the options that you want to use for the report generation. For instance if you want certain sections of the report to be omitted, you would select them at this time. Note: The options selected apply to all the reports generated in the batch.
5. Confirm that you have the proper records selected using the confirmation screen. To exclude a record, remove the checkmark in the Include column.
6. Submit the batch for generation.

When you submit the batch for generation, EPIC will provide you with an expected completion time for your batch. You have the option of 'not continuing' with the batch processing if the completion time does not meet your requirements. Completion time estimates are based on other batches that are currently in the system and the number of profiles in your batch.

Once the batch has completed processing, EPIC will send an email note to the account administrator email address(es) stored in the Personal Options section for your account. The EPIC home page will also display a message indicating that you have batch files available for download:

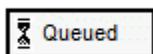


The Batch download message will remain on your EPIC home page until you have deleted all of your batch files or the expiration date for deleting the file has occurred and the system has automatically deleted your batch files.

In addition, the batch file download screen will provide you with a status of your batch. There are three status indicators:

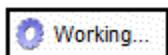
Queued:

The batch has been submitted and is waiting to be processed. Depending on the number and size of batches in the system, you could remain in this status for a period of time. The last column has a countdown timer that indicates the expected start time for processing your batch. The EPIC platform utilizes two servers to manage batch requests and processes them in a First In – First Out priority. The Queued status is represented by an hour glass on the batch download screen.



Working:

Your batch is now processing in the system. The progress meter in the far right column provides the status of your batch and the remaining time until completion. The batch completion time may fluctuate during this phase of the process based on the volume of activity in the system. **The batch processor does not speed up the processing of the reports**, but does immediately submit another report from your batch for processing as soon as the previous report is completed. For instance, if a DiSC Classic 2 took 30 seconds to process when you were generating the reports one at a time using the [View/Print/Email Completed Reports](#) function, it will still take 30 seconds and could even take slightly longer based on other activity on the batch processing servers. Your batch will process in its entirety once it has been submitted for processing. The Working status is represented by a gear.



If a problem occurs during this phase, EPIC will attempt to generate a report/profile three times. If it still cannot be generated, EPIC will mark it as failed and will continue processing the remaining profiles in your batch. The report download page will indicate the number of successful and failed reports in the batch.

File	Date	Product	Language	Complete	Failed	Expires	
 Download	4/21/2010	DiSC Classic 1.0	English	101	0	4/28/2010	Delete

Download:

Your batch file has completed processing and is available for download. The file has been stored in a compressed format to minimize its size and to speed the download process to your PC. Once you click on the download link, the download manager from your Internet browser will provide help accessing or saving the file to your PC. Since the file is in a compressed format, you will need decompression software on your PC to access the files. Download status is represented by a file folder and a clamp.



See the EPIC Help Section in your EPIC Account [Decompressing Batch Files](#) for additional information on working with compressed files.

Batch files will be retained on the system for 7 days. To conserve space for your account, it is advisable to delete the batch file from your EPIC account once you download it to your PC. An expiration date field is displayed after the batch file name indicating the date the file will be deleted from the system.