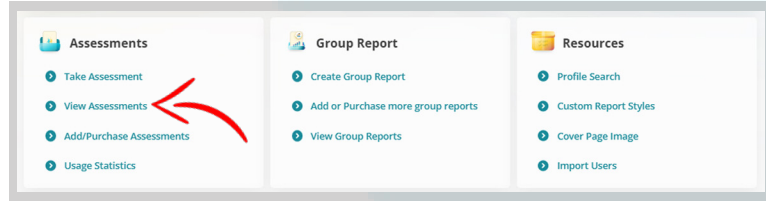


CREATE GROUP REPORT FROM KEYCODE

1. From the home page locate the Assessments box and click **View Assessments**.



2. From the View Assessments page, find the right keycode, and click **View Participants**.

The screenshot shows a table with columns: Keycode, Assessment, Purchased, Product Name, Available, Complete, Incomplete, Invitation, and View Participants. A red arrow points to the 'View Participants' link for the assessment with Keycode 59390-1EDF00.

Keycode	Assessment	Purchased	Product Name	Available	Complete	Incomplete	Invitation	View Participants
64204-ASB787	Perceptual & Cognitive	02/09/2021	Perceptual and Cognitive	0	1	0	✉ Invitation	👤 View Participants
59390-1EDF00	4D-DISC, TEAMS, VALUES with BAI	06/29/2020	4D - DISC, TEAMS, Values & BAI	17	2	1	✉ Invitation	👤 View Participants
58857-B7EF40	Comprehensive DISC Report	06/03/2020	Comprehensive DISC Report	2	3	1	✉ Invitation	👤 View Participants
58525-C40289	858 - The DISC Personality Style Report	05/22/2020	The DISC Personality Style Report	2	1	0	✉ Invitation	👤 View Participants

3. From the list, select the participants you want to include by placing a check in the box provided, or you can use the drop-down window in the header to select all.
4. When all of your participants have been selected, click the **Create Group Report** link located in the header.

The screenshot shows the 'Assessment Participants' page. At the top, there are tabs for 'Assessment Details', 'Assessment Participants', and 'Single-Use Keycodes'. Below the tabs, there is a search bar and a 'Benchmarking' section with a 'Save Benchmark' button. A toolbar contains several actions: 'Download Reports', 'Print Sections', 'Send Reminder', 'Recycle Incomplete Assess...', 'Create benchmark', 'Graph Comparison', 'Radar Graph', and 'Create Group Report'. A dropdown menu is set to 'Selected'. The main table lists participants with columns for Assessment Date, First Name, Last Name, Email, Status, Benchmark alignment, and D T V B. Red arrows point to the checkboxes for the first four participants and the 'Create Group Report' button.

Assessment Date	First Name	Last Name	Email	Status	Benchmark alignment	D T V B	
<input checked="" type="checkbox"/>	08/07/2025	Sample	User	john.schindell+44@peoplekeys.com	Completed	● 3/12	📄 View Report PDF
<input type="checkbox"/>	05/29/2025	Bruce	Banner	thehulk@avengers.com	Completed	● 7/12	📄 View Report PDF
<input checked="" type="checkbox"/>	04/22/2025	Samuel	Sample	test22@peoplekeys.com	Completed	● 12/12	📄 View Report PDF
<input checked="" type="checkbox"/>	12/05/2023	Tabitha	Tally	tab@tally.com	Completed	● 7/12	📄 View Report PDF
<input type="checkbox"/>	03/10/2023	Working	Demo	working@demo.com	Completed	● 12/12	📄 View Report PDF

Create Group Report



Instructions

To create a new group, select a group product and give the group a unique name. Then, using the table and user filters, select no more than fifty-five (55) user assessments to apply to your group. For each user added, check the box to the left of their name in the table and click the link "Add to Group". You'll see your list populate under "Selected Users". When your group is complete, you can generate your group report by clicking the "Create Group Report" button. Groups cannot be edited once the report has been generated.

[Go back](#)

Name Your Group

Select Product

Group Name

Presented By

Filter Users

By Search

By User Type

Include All Subaccounts

Show Results

First Name	Last Name	Email	Date Completed		
Sally	Sample	sample@pk.com	03/20/2020 12:42:41 PM UTC -04:00	View Report PDF	Add to Group
Sample	Sales	sample@pk.com	05/01/2020 6:33:51 AM UTC -04:00	View Report PDF	Add to Group
Sample	User	sample@pk.com	06/03/2020 12:31:58 PM UTC -04:00	View Report PDF	Add to Group
Tabitha	Tally	tab@tally.com	12/05/2023 12:01:38 PM UTC -04:00	View Report PDF	Add to Group
Samuel	Sample	test21@peoplekeys.com	04/10/2025 4:14:08 PM UTC -04:00	View Report PDF	Add to Group
Samuel	Sample	test22@peoplekeys.com	04/22/2025 2:51:12 PM UTC -04:00	View Report PDF	Add to Group
Steve	Sample	fakeoutss@testingonceagain.org	08/03/2020 5:30:09 AM UTC -04:00	View Report PDF	Add to Group
Sally	Sample	sample@pk.com	08/06/2020 8:03:39 AM UTC -04:00	View Report PDF	Add to Group
Steve	Sample	sc@fake.com	08/06/2020 8:05:10 AM UTC -04:00	View Report PDF	Add to Group
Samuel	Sample	test22@peoplekeys.com	04/22/2025 3:53:09 PM UTC -04:00	View Report PDF	Add to Group

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Selected Users

 [Search](#)

First Name	Last Name	Email	Date Completed		
Sally	Sample	sample@pk.com	03/20/2020 12:42:41 PM UTC -04:00	View Report PDF	Remove from group
Steve	Sample	fakeoutss@testingonceagain.org	08/03/2020 5:30:09 AM UTC -04:00	View Report PDF	Remove from group
Samuel	Sample	test22@peoplekeys.com	04/22/2025 2:51:12 PM UTC -04:00	View Report PDF	Remove from group
Steve	Sample	sc@fake.com	08/06/2020 8:05:10 AM UTC -04:00	View Report PDF	Remove from group

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[Save Changes](#)

[Create Group Report](#)

[Abandon Group](#)

5. Your product will automatically default to Group Dynamics Report. You will be asked to complete the **Name**, and **Presented by** fields.

6. You will see a list of everyone who has completed an assessment in your account. If you would like to add a participant from a different keycode, you can select the user by clicking **Add to Group**.

7. At the bottom of the page, you will see your previously compiled list. You can remove participants from this list by clicking **Remove from Group**.

8. **Save Changes** allows you to continue working on the list.

9. The **CREATE GROUP REPORT** button will generate and save your report in your account. (Once a report has been created, it cannot be altered or changed in any way.)

10. **ABANDON GROUP** allows you to erase all progress and create a new report. Note that once a report has been created it cannot be abandoned.