

# Generate a Birkman Report

## Purpose:

Use these steps to generate an individual or group report. Review list of reports available in each Birkman Package [here](#).

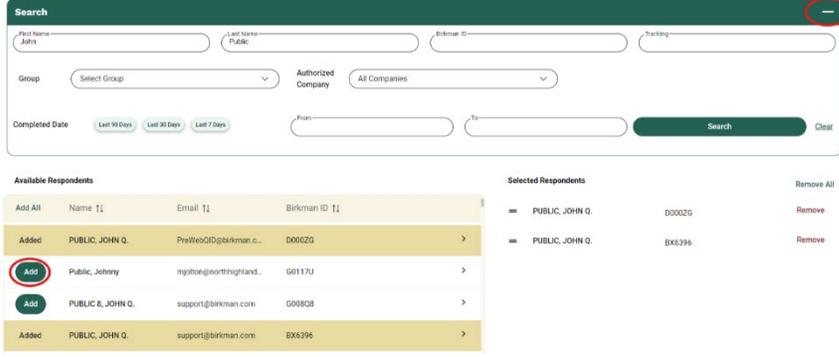
Types of reports include:

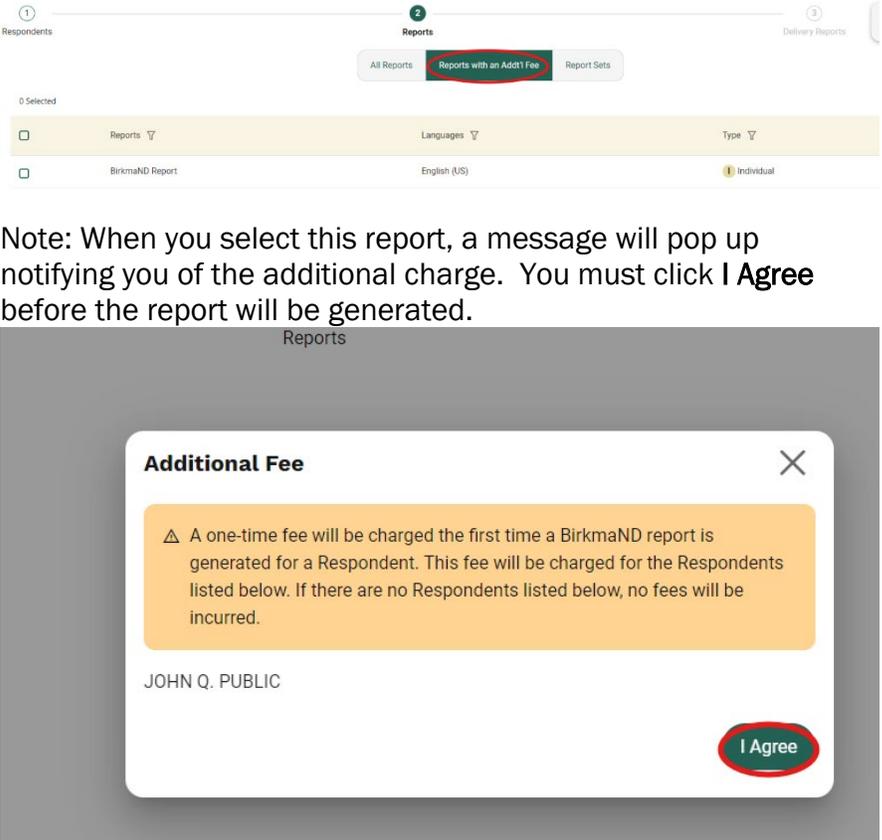
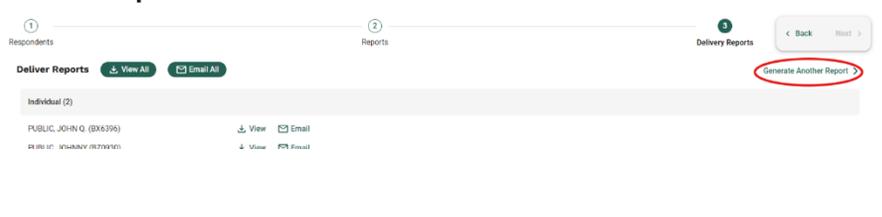
- **Individual:** Report with one respondent's data.
- **Group:** Report with multiple respondents' data.
- **Comparative:** Report that compares two respondents' data.
- **BirkmanND Report** is available for an Additional Fee. Learn more about this report [here](#).

## Need help?

- For technical assistance with BirkmanDirect or MyBirkman - [support@birkman.com](mailto:support@birkman.com)
- For strategy and implementation assistance – your Birkman Account Manager.

Step	Action	Result
1	Log in to BirkmanDirect <a href="http://direct.birkman.com">direct.birkman.com</a> .  Note: To reset your password, click <b>Forgot Your Password?</b>	
2	Click <b>Generate Reports</b> along the top of the Home screen or the green button.	
3	Search for the Respondent or Respondents.	<ul style="list-style-type: none"> <li>• Click the + in the green Search box to open more search fields</li> <li>• Your search results will appear in <b>Available Respondents</b></li> </ul>

Step	Action	Result
4	<p>Click <b>Add</b> to move the respondent into <b>Selected Respondents</b>.</p> <p><b>Note:</b> There is no limit to how many you add.</p>	 <p><b>Note:</b> If you add someone in error, click <b>Remove</b> next to the name under Selected Respondents.</p>
5	Click <b>Next</b> .	
6	<p>The Report list will show reports available in English (US). To change the language, click the <b>filter icon</b> next to <b>Languages</b> and select the languages you prefer.</p> <p><b>Note:</b> All reports are not available in all languages.</p>	
7	Select Reports.	<p>Click the <b>check box</b> next to report name.</p> <p><b>Tips:</b></p> <ul style="list-style-type: none"> <li>• Some reports have <b>Report Options</b> available that will allow you to modify the report. You will need to update these options prior to moving to the next page.</li> <li>• When you click <b>Report Options</b> a side bar will appear to allow you to make your choices. When done click <b>X</b> to return to the Report screen.</li> <li>• <b>Type</b> indicates the following categories of reports: <ul style="list-style-type: none"> <li>▪ <b>Individual:</b> Report with one respondent's data</li> <li>▪ <b>Group:</b> Report with multiple respondents' data. Requires you select multiple respondents on Respondents page.</li> <li>▪ <b>Comparative:</b> Report that compares two respondents' data. Requires you select two respondents on Respondents page.</li> </ul> </li> </ul>

Step	Action	Result
8	Click <b>Reports with an Add'l Fee</b> to generate the BirkmanND Report.	 <p>The screenshot shows a progress bar with three steps: 1 Respondents, 2 Reports, and 3 Delivery Reports. Under 'Reports', 'Reports with an Add'l Fee' is selected and circled in red. Below, a table lists 'BirkmanND Report' with language 'English (US)' and type 'Individual'. A modal dialog titled 'Additional Fee' is displayed, containing a warning message: 'A one-time fee will be charged the first time a BirkmanND report is generated for a Respondent. This fee will be charged for the Respondents listed below. If there are no Respondents listed below, no fees will be incurred.' The name 'JOHN Q. PUBLIC' is listed, and an 'I Agree' button is circled in red.</p> <p>Note: When you select this report, a message will pop up notifying you of the additional charge. You must click <b>I Agree</b> before the report will be generated.</p>
9	Click <b>Generate Another Report</b> for more reports.	 <p>The screenshot shows the 'Generate Reports' screen with the same progress bar. Under 'Delivery Reports', there are buttons for 'View All' and 'Email All'. A list shows 'Individual (2)' with details for 'PUBLIC, JOHN Q. (BX6396)'. A 'Generate Another Report' button is circled in red.</p>