EPIC Sub Account User Guide

EPIC
Electronic Profile
Information Center
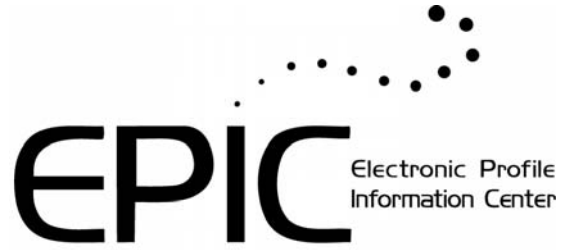
Version 3.1

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Getting Started

Welcome to Epic

Welcome to the Electronic Profile Information Center (EPIC) system developed by Inscape Publishing. This user-friendly and powerful system lets you take control and manage all of your online Inscape products. The EPIC system was developed from the ground up to improve and expedite the way you work with Inscape's online profiles.

The EPIC system gives you the power and flexibility to:

- Effectively manage your electronic profile warehouse
- Deliver multi-lingual assessments to clients around the world
- Easily allow access to Inscape Online profiles and control when the Respondent views the online report
- Personalize the Report Output and the Respondent site splash page with your logo and company information

See Glossary of Terms for a description of terms used in EPIC.

See System Overview for a quick description of the features of the EPIC system.

System Overview

EPIC is divided into three main functional areas to help you easily navigate through the system:

- **Manage Reports**
- **Manage Your Account**
- **Personal Options**

Basic System Navigation

When using EPIC, the features and options available to you in each of these functional areas can be quickly reviewed by moving your cursor onto the name (e.g. Manage Reports) that appears on the EPIC command line. A sub menu will appear showing you a list of the features available.
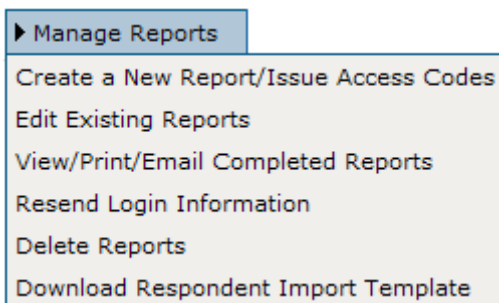
The EPIC Help system utilizes the phrase **Menu Location** to help you quickly find EPIC system features. The menu and sub menu where a feature is located will be identified along with a description of the EPIC feature or capability. For example, features that are located

under the **Manage Reports** main menu and in the **Edit Existing Reports** sub menu would be notated as follows:

Menu Location: Manage Reports>>Edit Existing Reports

For a quick overview of the key areas of EPIC, please read the sections below:

Manage Reports

The Manage Reports section of EPIC gives you the ability to issue access to Inscape's online profiles, create group reports, edit existing reports in the system and delete reports. You also have the ability to print, email, or save completed reports through this section of EPIC.

See Overview of Manage Reports for more information.

Manage Your Account

The Manage Your Account section covers activity related to your use of the system and provides you with management tools to work with your Sub Accounts

See Overview of Manage Your Account for more information.

Personal Options

The Personal Options section is used for viewing and editing the account information for your account. The View/Edit Account Information page lets you change things like:

- Company Information
- Contact Information
- Company Logo
- Company name

You also can change the default settings for EPIC features such as:

- Credit reminder
- Email subject line
- Completion notification
- System timeout
- Email style

See Overview of Personal Options for more information.

Glossary of Terms

Administrator: A user of the EPIC system who has the ability to access system features either as a Primary Account Administrator or a Sub Account Administrator.

Alternate name: The name that the respondent entered in the system at the time he or she completed the profile.

Credits: Usage units (EPIC system currency) needed to issue access codes or create reports on the system.

Pending Report: The access code has been assigned by the EPIC administrator, but the respondent has not completed the profile.

Profile: A profile is the online Inscape Publishing product. (e.g. DiSC Classic)

Primary Account Administrator: An Inscape Distributor who has access to **all** of the EPIC system features as well as all Inscape online products.

Respondent: A respondent is the person responding to the questions and receiving the report for an Inscape profile.

Report (Basic Report): Product specific information and feedback that is personalized and provided to the respondent upon completion of the online question portion of the Inscape profile.

Splash Page: The first page seen by the respondent when they begin taking an online profile. The splash page displays the Contact Information and the Company Logo provided by the administrator.

Sub Account Administrator: A client/customer of an Inscape Distributor who has access to a smaller set of EPIC system features and a limited number of Inscape online profiles. (Note: The Distributor determines the online profiles that are available to the Sub Account at the time the account is setup.)

Sub Account Hierarchy: A group of Sub Accounts that are connected to a single Primary Account in an ordered structure.

Credits

'Credits' is the term used to describe the currency used in the EPIC system. Credits are needed to generate reports and issue access codes. Your current credit balance is displayed in the upper right portion of your EPIC administrator screen along with your UserID and the session timer.
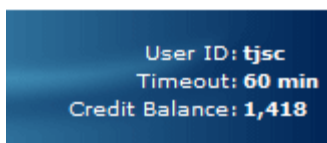
When the credit balance font color changes from Black to Red, it is an indication that you have reached your Credit Reminder threshold.

Anytime credits are deducted from your account, you will receive a confirmation message notifying you of the number of credits that will be removed from your account.
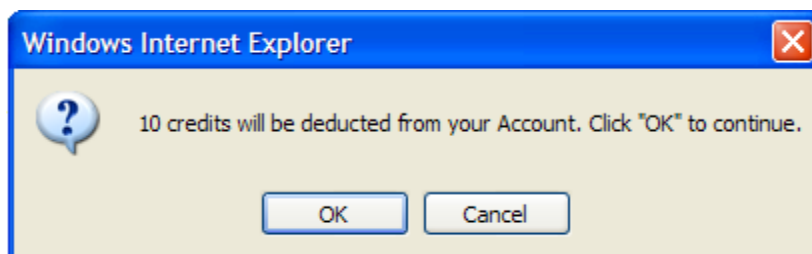
Note: Credits will never be removed from your account unless you see this confirmation message.

Each report in the system is assigned a credit value. For instance, it takes 10 credits to generate the DiSC Classic report. Credits are charged in the following circumstances:

- When access codes are issued
- When a report is generated from tally box scores
- When supplemental reports are added to an existing report setup using the Edit Existing Reports function
- When a dyad, facilitator or group report is generated

Subsequent report generation using View/Print/Email Completed Reports does not deduct additional credits from your credit balance.

Credit values assigned to each of the reports can be reviewed in

> **Menu Location:** Manage Your Account>>Credits Charged for Reports.

Credits can be purchased by contacting your Inscape Publishing Distributor. Credits can also be transferred between Sub Accounts using the Transferring Credits feature.

Account Status

An account will have one of the following account status indicators:

- **Active:** An account in good standing.
- **Expired:** An account where additional credits cannot be added. Any credits that are remaining in the system can still be used but additional credits cannot be added to the account.
- **Locked or Suspended**: A locked or suspended account cannot be used. If an account has a status of locked or suspended, please contact your Inscape Publishing Distributor for assistance.

Online Help

Menu Location: Help

General Tips for Using the Online Help

The Online Help folder gives you three methods for retrieving information about the EPIC system:

- Books where topics are organized in broad categories (Found on the Contents Tab)
- Topic Index where you can see all of the topics in the Help folder (Found on the Index Tab)
- Search screen where you can search for key words (Found on the Search Tab)

Contents | Index | Search

One of the quickest ways to find information in the EPIC system is through the Search capability. The full-text search lets you search every topic in the Help system for a particular word or phrase. The search finds and displays topics containing the actual word or phrase that you entered.

The EPIC Help system utilizes the phrase **Menu Location** to help you quickly find EPIC system features. The menu and sub menu where a feature is located will be identified along with a description of the EPIC feature or capability. For example, features that are located under the **Manage Reports** main menu and in the **Edit Existing Reports** sub menu would be notated as follows:

Menu Location: Manage Reports>>Edit Existing Reports

Some help topics also have additional information available or a link to another topic that might provide additional insight. If you see an underlined word/phrase you can click on that link to get additional information about the topic.

Topic specific or quick help can be found throughout EPIC. Quick help is designated by the symbol. Simply click on the symbol for information on the topic.

Animated tutorials showing key features of EPIC are also available under the Help menu item.

Home

Menu Location: Home

The EPIC Administrator home page contains information on new product releases, tips for using EPIC, and general information from Inscape on how to get the most out of your EPIC account.

Technical Support

Contacting Technical Support

Inscape Publishing strives to provide state-of-the-art support for its customers. If you have questions about using the EPIC system, and have not found the answers in the online Help, the animated tutorials, or by talking to your Inscape Publishing Distributor, please contact Inscape Technical Support at 763-765-2233 from 9:00 a.m. - 5:00 p.m. CT Monday - Friday.

Creating and Managing Reports

Overview of Manage Reports

The Manage Reports function provides the Administrator with the following capabilities:

- Create a New Report/Issue Access Codes
- Edit Existing Reports
- Resend Login Information
- View/Print/Email Completed Reports
- Delete Reports from the System

The **Create a New Report/Issue Access Codes** page gives you the ability to create and generate reports for your respondents by issuing an online access code or through tally box scores (not available for all reports). Group and facilitator reports are also generated using this option. See Creating New Reports for more information.

The **Edit Existing Reports** lets you view and edit information such as name and email address for respondents you have in EPIC. You also can also add or change participants in existing group reports, add supplemental reports (if available) to an existing profile, and change the storage (folder/sub folder) location where the report is stored. See Edit Existing Reports for more information on this feature.

The **Resend Login Information** page lets you resend login information for an online profile to a respondent who may not have received or misplaced the original email. If you resend login information to a respondent, they will receive a copy of the original login information email. Resending login information does not incur credit charges. See Resend Respondent Login Information for more information.

The **View/Print/Email Completed Report** allows you to act on all of the completed reports in the EPIC system and view, print, or email the report. See View/Print/Email Completed Reports for more information.

The **Delete Report** function lets you permanently delete all information for a report stored in your EPIC system. See Deleting Records/Reports in EPIC.

The **Download Respondent Import Template** lets you download an Excel Spreadsheet template that can be used as a starting point for the Import Names function when assigning access codes.

Creating New Reports and Issuing Access Codes

Menu Location: Manage Reports

The Create a New Report/Issue Access Code page is the starting point for:

- Selecting the product/profile that you want to use (See Selecting a Product/Report)
- Selecting Report options such as response style (available on selected reports), report printing options and tailored reports that were created using the Manage Report Tailoring feature.
- Entering respondent email addresses so they can complete an online profile (See Entering Data to Assign Access Codes)
- Creating new reports by entering tally box scores (See Tally Box Scores)

- Using the Import Names function to bring groups of names into the system for assigning access codes
- Creating dyad, facilitator, comparison and group reports (Note: Participants for all of these reports must have completed an individual profile issued from either your EPIC administrator account or from one of your sub accounts before they can be included in a report. See Viewing Sub Account Records for more information on using reports created by your sub accounts as participants in a group report.)

Entering Data to Assign Access Codes

Menu Location: Manage Reports>>Creating a New Report/Issue Access Codes

Once the report/profile is selected and the report options have been determined, you will see the main assign access code screen.

The Report Details section displays the profile and the options you have selected. The folders section allows you to select existing folder/sub folder combinations or create new folders to store your records. It is recommended that you store all access codes that you assign in folders and sub folders so they are easy to find using the Search feature (See Searching for Records).

Once the folders have been chosen, you can begin creating the list of names that will receive an access code for a profile/report.

- Enter the email address for the respondent. Note the email address must be valid or the system will flag it as an error. EPIC checks for the existence of the domain (e.g., inscapepublishing.com), but does not check for the existence of a specific individual (e.g., jsmith@inscapepublishing.com)

- The quantity field allows you to send more than one access code to an individual (the default is 1). If you increase the quantity, individual email notes will be sent to the respondent based on the number in the quantity field.

- View online allows you to control whether the respondent views the report at the completion of the online responses. If the view is set to Yes, the respondent has the option to View, Print, Download or Email the report. If the view is set to No, the respondent sees a screen indicating the report will be delivered by the EPIC account administrator.

- Enter the name for the respondent.

- Once the information is entered, click the Add Respondent button to add the name to the list. (Shortcut: Use the enter key to add a name to the list instead of clicking the Add Respondent button)

- Repeat the process for all of the individuals that will complete the profile/report.

Note: There is no limit to the number of email addresses and names you can enter on the screen, but when the total number exceeds 25, the system will process the mailing of access codes in timed intervals. For these larger groups, EPIC will store the list in a queue. The access code email will be sent out in groups of 25 names every 10 minutes. This batching and time interval process prevents triggering spam problems at a receiving site.

You can remove a name from the list by clicking the X in front of the name.

The list below displays the Respondents that will receive an Access Code. To remove a name from the list, click ✖.

Email Address	Quantity	View Report	Name	Credits
✖ emartin@create-a-roadster.com	1	Yes	Ed Martin	10
✖ djohnson@create-a-roadster.com	1	Yes	Daniela Johnson	10
✖ oaraabi@create-a-roadster.com	1	Yes	Omar Araabi	10
	Total Quantity: 3			Total Credits: 30

After entering all of the names, click the Assign Access codes button at the bottom of the screen. A confirmation window will be displayed indicating the number of credits that will be deducted from your account. Click OK to confirm the credits that will be deducted.

At this point you have the option to add a custom email note to the assign access code email sent by the system and/or customize the email subject line. See Custom Email Messages and Custom Email Subject Line - One time change for additional information.

Once the assign access code process is completed, you will see the Assign Access Code Confirmation screen. Use this screen to review the status of the access codes you sent.

See Import Names for information on using an Excel spreadsheet to import names into the Assign Access code function.

Assign Access Code Confirmation

The last step of the Issue Access Codes process is the display of the Confirmation Screen. This screen provides you with a status of the access code creation and the email process. In the example below, two access codes were sent out and the system indicates that the codes were successfully created and email has been sent.

Email Address	View Report	Name	Status
emartin@create-a-roadster.com	Yes	Ed Martin	Access Code created and email sent.
djohnson@create-a-roadster.com	Yes	Daniela Johnson	Access Code created and email sent.

Summary

Total Access Codes Created:	2
Previous Credit Balance:	878
Total Credits Charged:	20
New Credit Balance:	858

The confirmation screen also provides a before and after snapshot of the credit balance for the EPIC account.

If you entered more than 25 names on the Assign Access Code Screen, the status message will indicate that the access code was created and email has been queued for delivery.

emartin@create-a-roadster.com	No	Ed Martin	Access Code created and email queued for delivery.
djohnson@create-a-roadster.com	Yes	Daniela Johnson	Access Code created and email queued for delivery.
thanson@create-a-roadster.com	No	Terry Hanson	Access Code created and email queued for delivery.
epicprimary@inscapepublishing.com	Yes	Epic Primary	Access Code created and email

Selecting a Product/Report

Menu Location: Manage Reports>>Create a New Report/Issue Access Codes

The Inscape profiles that are available for your use in EPIC are shown in the Product Family and Product drop down boxes. To view the available products/profiles, click the down arrow to the right of the product family box and then review the product list by clicking the arrow to the right of the product box. To select a product family or product, click on the product name in each drop down box.

Some Inscape Profiles are available in other languages. To view availability of a product in another language, click on the arrow to the right of the Language box.   The default product language that you selected when setting up your account using View/Edit Account Information will automatically be filled in for you when selecting products. You can choose a different language by clicking the drop down box

Response Style

Menu Location: Manage Reports>>Create a New Report/Issue Access Codes

There are two response style options for *DiSC Classic 1, DiSC Classic 2.0, DiSC Classic 2 Plus and DiSC PPSS*.

Word Version—The respondent is presented with **four words** from which he/she chooses one that is "Most Like Me" and one that is "Least Like Me"

Phrase Version—The respondent is presented with **four phrases** from which he/she chooses one that is "Most Like Me" and one that is "Least Like Me"

The phrase response option allows you to bring DiSC to a broader range of learners. Written at a sixth-grade reading level, the phrase responses provide an alternative to the traditional word response format.

When assigning access codes for *DiSC Classic 1.0*, *DiSC Classic 2.0*, *DiSC Classic 2 Plus* or *DiSC PPSS*, you'll have an option to "Select a Response Style for the report" on the Select Report Features screen. If you'd like the respondent to have the word version, leave the response style on the default "Word Version." If you want the respondent to have the phrase version, simply select "Phrase Version."

Both the word or phrase response version will produce the same *DiSC Classic 1.0*, *DiSC Classic 2.0*, *DiSC Classic 2 Plus* or *DiSC PPSS* report and both response style reports can be used when generating group or comparison reports.

Controlling Online Report Viewing

Menu Location: Manage Reports>>Create a New Report/Issue Access Codes

EPIC allows you to control whether an individual respondent has the ability to view a report online following completion of the web based question/response section. When an access code is issued for an Inscape profile, you can select either Yes or No for the View Online option. If **Yes** is selected, the respondent will be able to see the report immediately upon completion of the questions. If **No** is selected, the respondent will see a screen indicating that

they have completed the profile and the report will be delivered to them by their EPIC administrator.

The system default for report viewing is set to Yes. The default can be changed in the Advanced Options section in View/Edit Account Information

When building dyad and group reports, you can control the online viewing for each individual participant of the report by using the View Online Option when you're creating the report.

The viewing option (Yes or No) can be changed for a pending or completed report by using the Edit Existing Reports feature.

Tally Box Scores

Menu Location: Manage Reports>>Create a New Report/Issue Access Codes

If a profile has an option to enter tally box scores to create the report (e.g. DiSC Classic), you will have the tally box report creation choice available for selection after clicking the Next button on the Product Selection screen.

If tally box scores are not supported for a particular profile, the only way to generate a report is to issue an access code and have the respondent complete the profile online.

Tally box scores for completed 28 box DiSC family profiles can be displayed in Edit Existing Reports by clicking the Display Tally Box scores button.

Edit Existing Reports

Menu Location: Manage Reports

The Edit Existing Reports page lets you review and edit information about individual respondents in your EPIC system and make changes to Group Report participants.

You can change the following fields for Individual records:

- Respondent's email address
- Respondent's name (entered by the administrator)
- Respondent's name (entered by the respondent when completing the profile) - also referred to as Alternate name
- Respondent's gender
- The folder or sub folder the records is stored in

- Whether the report can be viewed online

Important Notes – Editing Individual Records

- The email address, name and gender fields can only be edited twice once the profile has been completed. The third attempt to edit these fields is blocked by EPIC.

- An 'Edits Remaining' field is displayed on the screen for each record. It lets you know the remaining number of times you can make email address, name and gender field changes to the record.

- If the profile is **pending** (has not been completed) the edits remaining rule does not apply.

- There is no restriction on the number of changes to the Folder and Sub Folder location for the record.

- Adding Supplemental Reports or generating an additional DiSC report from an existing set of DiSC scores does not count as an edit.

- Changes to a respondent's email address for **pending** reports will generate an email to the respondent with login information for the assigned profile.

- Changes to a respondents email address for a **completed** report will not generate an email if the view is set to **No**. If the view is set to **Yes**, an email note will be sent to the respondent

- Changing a respondent's ability to view the report online from **No** to **Yes** will generate an email to the respondent with an access code for viewing the report.

- Name changes cannot be made on Follow-up Activities (e.g. Everything DiSC Sales Customer Interaction Map). A change to the customer name on a completed follow-up activity an only be made by the Respondent by accessing their Follow-up Activity site.

The following Advanced Report Options are also available in the Edit function:

- An additional DiSC report can be generated from an existing DiSC report by using the Create an additional DiSC Report button. For example a DiSC Classic 2.0 report can be generated from an existing DiSC Classic 1.0 report using this feature. See Create an Additional DiSC Report

- The content of the report (e.g. Graph 1 and 2 display) and the addition of supplemental reports (if applicable) can be added to profiles by using the Change Report Content button. See Adding Supplemental Reports and Change Report Content for more information.

- Tally box scores for completed DiSC family products can be displayed by clicking the Display Tally Box Scores button.

Comparison, team view, facilitator, group and Indra Dyad reports that have been entered in the system through the Creating New Reports function can also be edited using this feature. You can:

- Change the participants (add or remove participants) in all types of group, facilitator, or comparison reports
- Change the online view for individual participants in a group report
- Add additional report recipients
- Change the storage folder or sub folder

Important Notes – Editing Group and Comparison Reports

- At least one member of the previous group needs to be retained. EPIC will not allow removal of all group members

- EPIC allows two edits to group membership. (An edit is defined as any combination of **removal or addition** of participants that occurs prior to clicking the Next button or going to another function in the EPIC system.)

- An 'Edits Remaining' field is displayed on the screen for each group report. It lets you know the remaining number of times you can make changes to the participants in the report.

- Removing or adding participants without regeneration of the report still counts as a membership edit and uses one of the two edits that EPIC allows

- There is no restriction on the number of changes to the Folder and Sub Folder location for the group report record.

Advanced Report Options

Menu Location: Manage Reports>>Edit Existing Reports

The following **Advanced Report Options** are available when editing a report:

- An additional DiSC report can be generated from an existing DiSC report by using the Create an additional DiSC Report button. For example a DiSC Classic 2.0 report can be generated from an existing DiSC Classic 1.0 report using this feature.   See Create an Additional DiSC Report

- The content of the report (e.g. Graph 1 and 2 display) and the addition of supplemental reports (if applicable) can be added to profiles by using the Change Report Content button. See Adding Supplemental Reports and Change Report Content for more information.

- Tally box scores for completed DiSC family products can be displayed and printed by clicking the Display Tally Box Scores button.

When a report is in pending status, the only option available in the Advanced Report Options is the Change Report Content button. Once the report is completed, the other options become available.

Create an Additional DiSC Report

Menu Location: Manage Reports>>Edit Existing Reports

Some reports in EPIC can be generated from an existing set of scores in your EPIC account. For example, once a respondent completes one of the DiSC family reports (DiSC Classic 1, DiSC Classic 2, DiSC Classic 2 Plus, or DiSC PPSS) the scores can be used to generate an additional DiSC report in that group. This gives you the ability to generate another report for an individual without having them complete the response section again.

Locate the record that you want to use for creating the additional report by using the Edit Existing Reports function. Then select the Create an Additional DiSC Report button at the

bottom of the page.   The drop down menu that is displayed when you click the Create an Additional Report button shows you all of the reports that can be created from the existing scores.

When this option is selected, the system steps you through the process of creating the new report. You can choose to have the respondent view the new report immediately by selecting the Yes option for View Report Online. You can also print the report yourself at the end of the process. Since you are using existing responses, you do not need to enter tally box scores or assign a new access code to the respondent. Credits required for generating the new report will be charged to your account when the new report is created.

Adding Supplemental Reports to a DiSC PPSS Report

Menu Location: Manage Reports>>Edit Existing Reports

Once a DiSC PPSS report/profile is created using the Creating New Reports function, you can add additional Supplemental reports by using the Edit Existing Reports function and selecting the Change Report Content button. When a Supplemental report is added you will be charged the appropriate number of credits.

If the report is pending, (e.g. the Respondent has not yet completed the profile) they will see the additional Supplemental Report when they complete the profile.

If the report has already been completed, you can make the updated profile with the additional Supplemental Report available to the Respondent immediately by setting the View Online selection to Yes. If you do not want them to see the report, make sure the View Online is set to No. If the Report has already been completed, you will have the option to generate the report with the new supplemental report included when you get to the Add Supplemental report Confirmation screen.

Change Report Content

Menu Location: Manage Reports

Some reports have print options available that allow you to control what sections of the report are printed or displayed when a report is generated. If these report printing options are available for a profile, the controllable sections are displayed during the Creating New Reports process and can be selected at the time the access code is assigned. The sections selected will be displayed to the Respondent upon completion of the online profile.

If you want to change your selections, you can make permanent changes using the Edit Existing Reports option. You can also make temporary changes to the print options by selecting what sections of the report to print when using the View/Print/Email Completed Reports feature.

If a report does not have print options available, the change report content button will not be displayed and you will see the entire report anytime the report is displayed or printed.

Follow-up Activity

The follow-up activities or post training reinforcement available in EPIC lets you assign an additional training experience for the Respondent following the completion of a profile. Follow-up activities, like the Everything DiSC Sales Customer Interaction Map, can be assigned to the Respondent once they complete the Everything DiSC Sales Profile. (Note: Follow-up activities are only available for selected profiles.)

To begin assigning a follow-up activity, start at Manage Reports>>Creating a New Report/Issue Access Codes and then select the follow-up activity from the drop down list. Once the follow-up activity is selected, the normal process for assigning the access codes changes. Since a follow-up activity relies on the completion of a main report (e.g. The Everything DiSC Sales Profile must be completed before you can assign the Everything DiSC Sales Customer Interaction Map), the first step in the process is to locate the main report.

In this example, we will assign an Everything DiSC Sales Customer Interaction Map follow-up activity. Click the Add Profile button to locate the completed Everything DiSC Sales Profiles.
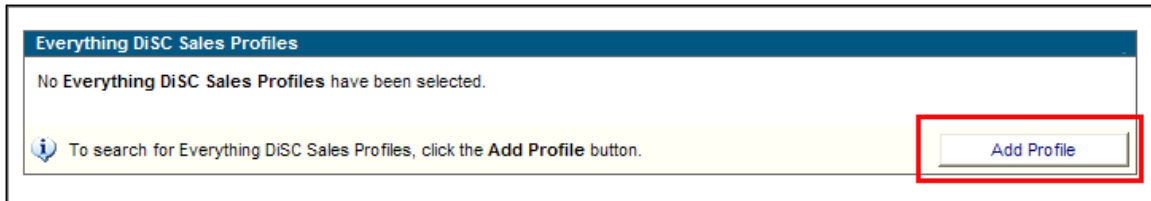
Once the profiles are located using the normal Searching for Records function, you can select the profiles from the Search Results list. Once the records are selected and you return to the setup process, individual records can be removed from the list by using the Remove link next to the name. When the list has been verified, click the next button to move to the next step to determine the number of maps to assign to each individual.

The same number of maps can be assigned to all individuals in the list by entering a quantity and using the Apply button or you can add/change the quantity of maps for each individual by changing the quantity by the individual's name.

16
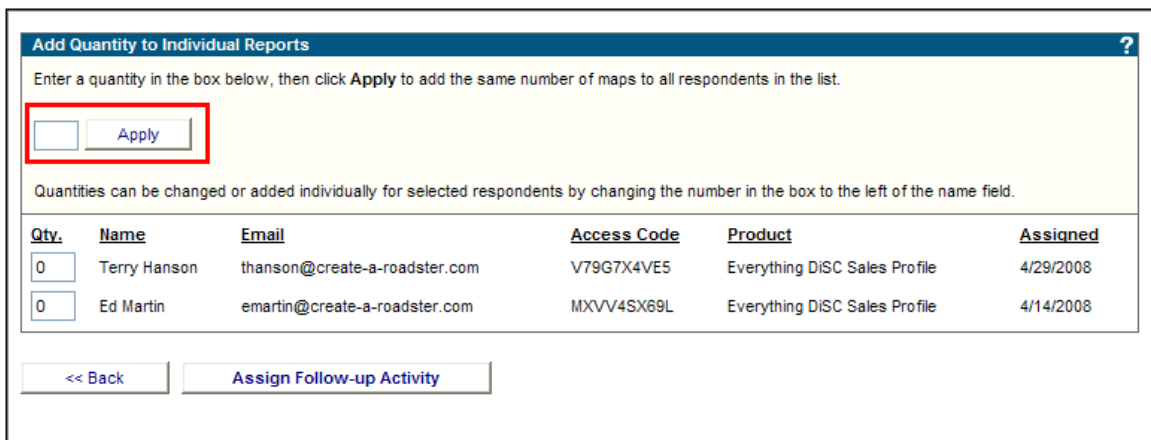
Clicking the Assign Follow-up Activity button at the bottom of the screen will complete the process and send an email note to the respondent with information on accessing the Everything DiSC Sales Customer Interaction Maps. Custom Email Messages can also be included as part of this process.
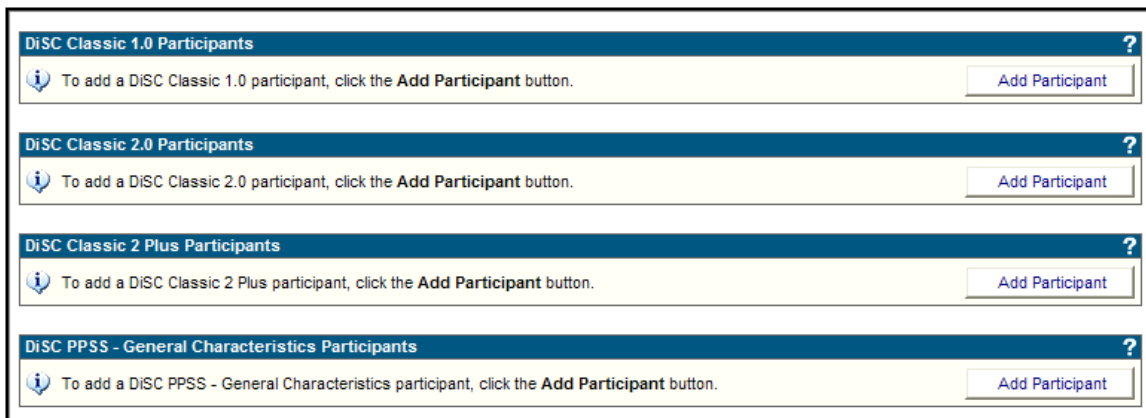
Creating a Group Report

Menu Location: Manage Reports>>Create a New Report/Issue Access Codes

When a Group report is available for a profile, it can be generated using the Creating New Reports feature. The process for building the Group Report allows the EPIC administrator to retrieve completed profiles from their EPIC account and use them as participants in a group report. The minimum number of participants for a group report is 2.

The Report name feature in the Report Details section provides you with an area to enter text that will be displayed on the front cover of the report. This area allows a maximum of 50 characters.

Individual reports that you want to use in a group report must be in a **Completed** status and are selected from the list of eligible products for the group report you are creating. For example, when building a Time Mastery Group Report, the only participants that can be added are those that have completed a Time Mastery Individual Report.

When building a group that allows a variety of individual reports as input (e.g. DiSC Group Culture Report), the add participants area is divided into sections that show the individual reports that are eligible to be used in the creation of the report. Individual reports must be added to the group report one section at a time.

See Adding Participants to a Group Report for additional information on selecting participants from the search results screen.

If you want to remove a participant from your group report during the report creation process, click the **Remove** link by their name. EPIC will ask for confirmation and then delete the record.

See Viewing a Group Report for information on giving individual participants an online view of the group report.

See Viewing Sub Account Records for information on using Sub Account records in a group report.

Viewing a Group Report

Individual reports that are used as participants in a group report can be provided with a link to view a completed group report as long as you have an email address available. During the group report creation process, you can provide the individual with a link to view the completed report by clicking the check box by their name.

If the View Checkbox is not displayed, it indicates that EPIC does not have an email address available for that individual report. See Edit Existing Reports for information on adding an email address.

The View checkbox used during the Group Report creation process **does not correspond** to the View online option that you selected when you assigned an access code for the individual report. Providing a view of the group report (checking the checkbox) for an individual participant provides them with a link to view the completed group report online. It does not send a copy of the group report to the individual but does send an email with information on accessing the report. Checking the View checkbox during the Group Report creation process does not change the View online option for the participant's individual report.

You can also provide a link to view the report to an **Additional Report Recipient**. An Additional Report Recipient is an individual that has a need to see the group report but is not one of the participants that you selected when creating the report.   The only requirement for adding an additional report recipient is a valid email address. Simply enter the email address for an additional recipient in the text box and then click the Add Recipient button. Repeat the process to add additional names to the list. You can remove names that have been added to the list by clicking on the X in front of their email address.

Once the report creation is completed, an email providing a link to access the group report is sent to individual participants with a View checkbox checked and to all additional report recipients.

Adding Participants to a Group Report

Menu Location: Manage Reports>>Create a New Report/Issue Access Codes

The search results screen that is displayed when retrieving participants for a group report allows you to select a participant in two different ways. You can add an individual name by clicking the check box in the left column of the search results screen and then clicking on the Next button at the bottom of the screen

or, you can add all participants returned by the search to the report by clicking the Select All button at the bottom of the screen.

Individual participants can be provided access to the group report you create once they have been added to the participant list. See Viewing a Group Report for additional information.

Removing or Changing Participants in a Group Report

Menu Location: Manage Reports>>Edit Existing Reports

You can change participants in a completed comparison report (group or facilitator) using the Edit Existing Reports function.

The following rules apply to this feature:

- At least one member of the previous group needs to be retained. EPIC will not allow removal of all group members
- EPIC allows two edits to group membership. (**Note:** An edit is defined as any combination of **removal or addition** of participants that occurs prior to clicking the Next button or going to another function in the EPIC system. Removing or adding participants without regeneration of the report still counts as a membership edit and uses up one of the two edits that EPIC allows.)

- An 'Edits Remaining' field displayed on the screen for each group report lets you know the remaining number of times you can make changes to the participants in the report.

See Deleting Records/Reports in EPIC for information on the effect of record deletion on group report participants.

View/Print/Email Completed Reports

Menu Location: Manage Reports

All **completed** reports in your EPIC system can be retrieved using the View/Print/Email Completed reports function. Since the actual PDF (file) of the report is not stored in EPIC, using this feature will regenerate the report each time you want to View/Print/Email. See Regenerating Reports for additional information on report regeneration.

You can choose whether to print the report in color or black and white (B/W) and, for profiles with supplemental reports or report content options, you can choose what supplemental reports to include or which section of the report to print. (Note: Supplemental reports for the DiSC PPSS General Characteristics report will only be available for printing if they were included as part of the initial report creation either via entering Tally Box Scores or assigning an access code via Creating New Reports. If you want to add additional supplemental reports, see Adding Supplemental Reports.)

When you select B/W for the report output, the report is converted to gray scale format and optimized for a B/W printer. The report will also display in Adobe reader in B/W.

You can also use the View/Print/Email feature to download completed reports to your PC or email a completed report to the respondent. The email feature allows you to mail a completed report to anyone with a valid email address and include Custom Email Messages as part of the email sent by EPIC.

Adobe Reader Version 5.0 or higher needs to be installed on your computer to view and print EPIC reports.

View Report in English

Menu Location: Manage Reports>>View/Print/Email Completed Reports

Note: This feature only applies to accounts that have access to multi-lingual profiles through their EPIC account.

If an access code has been assigned for a DiSC profile in another language (e.g. Spanish), you have the capability to generate a U.S. English version of the report during the View/Print/Email Completed Reports process. Simply check the View in U.S. English checkbox in the Report Options section. This feature makes it possible for the respondent to view a report in the language selected at the time the DiSC profile access code was assigned, but also gives the administrator the ability to view the report in English if needed.

Resend Respondent Login Information

Menu Location: Manage Reports

The Resend Login Information page lets you resend access code information. This is useful when an individual respondent or group of respondents lose or misplace the email note with the access code needed to complete a profile. If you resend login information to a respondent, they will receive a copy of the login information email message that was sent when you initially assigned the access code. **Resending login information does not incur additional credit charges.**

Use the search screen to find the access codes that need to be resent. The search results screen allows you to select individuals in two different ways. You can select an individual name by clicking the check box in the left column of the search results screen and then clicking on the Next button at the bottom of the screen
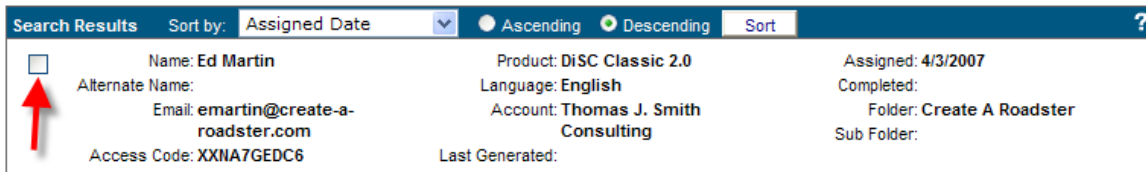
or, you can resend login information to **all** individuals returned by the search by clicking the Select All button at the bottom of the screen.

The confirmation screen shows all of the access codes that have been selected. To remove a name from the list, simply remove the check mark in front of the name.

You also have an option to add Custom Email Messages and customize the email subject line before resending the login information.

Login information can be sent for either pending or completed records but these two report types cannot be mixed in the same resend process. The search criteria screen allows you to select **either** pending or completed reports as one of the search criteria but not both at the same time. This separation of the two types of reports allows you to see the difference in the email subject line that is used for the two types of reports and allows you to customize it as needed.

The Resend login information **does not allow editing** of the respondent record. If you need to resend the login information because you entered the email address incorrectly, you need to use the Edit Existing Reports function to correct the email address. When the email address is changed or corrected using the Edit function, EPIC automatically sends an email note to the respondent with login information.

Regenerating Reports

Menu Location: Manage Reports

EPIC does not store the PDF file for completed reports. The **responses** from the profile are stored in the system so each time you use the View/Print/Email Completed Reports function to retrieve a completed report, EPIC will regenerate the report. Regenerating the report does not incur an additional credit charge. (Note: The regenerated report will display the date the report was initially completed by the respondent on the front cover, not the current date.)

Some possible reasons for regenerating reports:

- A respondent has misspelled their name when they entered it into the system and you need to correct it for him/her and provide them with another copy of the profile (Use Edit Existing Reports to correct the Alternate Name field before regenerating the report)

- A change was made to the profile by Inscape and you want to regenerate reports so you can use the updated profile

- You want to change from Color to B/W or B/W to Color for the report output

- You want to print the report with different options selected. (e.g. display tally box scores on Classic 1 or Classic 2)

Import Names

Menu Location: Manage Reports>>Creating a New Report/Issue Access Codes

EPIC allows you to import a list of names from an Excel spreadsheet into EPIC for the purpose of assigning access codes.

The data on the excel spreadsheet must be properly structured or the import process will fail. A properly formatted template is available for download on the Manage Reports Menu Item.
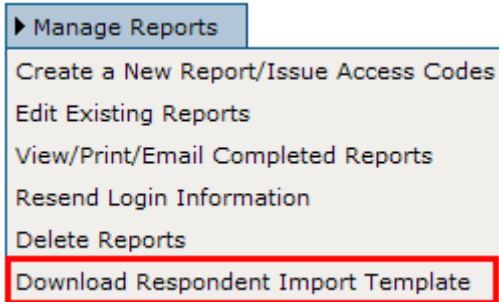
The Excel spreadsheet template contains three columns.

- Column 1 is for the respondents email address
- Column 2 is for the respondents name
- Column 3 is the Yes/No indicator for Viewing the Report (1=view, 0=no view).

Once you have the data loaded into your spreadsheet, follow the normal Create Report/Issue Access Code process by selecting the profile/report, report options, etc. When you get to the screen where you would normally enter the email addresses and names, click the Import Respondents link.
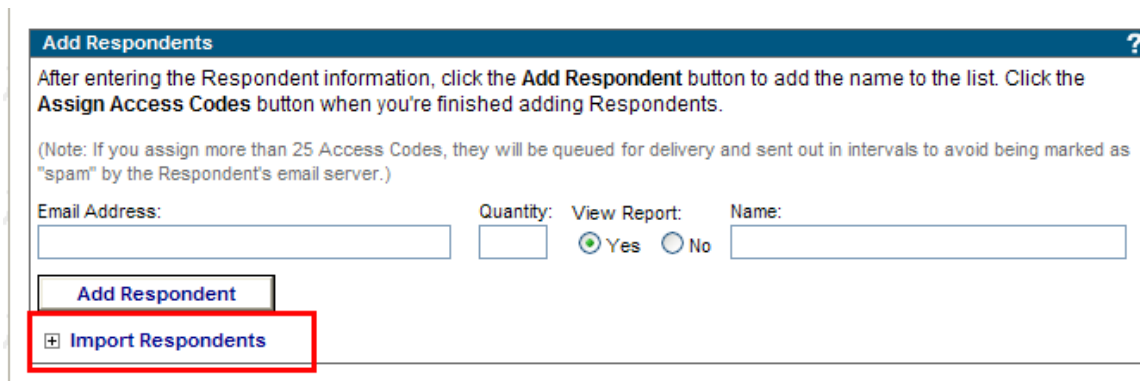
This opens an additional section of the Assign Access Codes screen that allows you to browse for the location of your spreadsheet. Once the spreadsheet has been located, the Upload File button is activated.

The following situations will prevent the spreadsheet from loading:

- Invalid email addresses
- Insufficient number of credits in your EPIC account to assign access codes to the names on your list
- An improperly formatted spreadsheet (e.g., using a Y or N in the view report column instead of a 1 or 0)

If one of these errors is detected, the import processes in stopped. The system **will not import a partial list of names**, so any error that is encountered will stop the process and

names will not be displayed on the Assign Access Codes screen. If this occurs, you need to correct your spreadsheet and retry the import step. Credits are not charged to your account until you finish the import process and click the Assign Access Codes button at the bottom of the screen.

Note: There is no duplicate detection process for the import file. If you upload a file more than once, access codes will be sent again and you will need to use the Unassign Access Codes/Reclaim Credits to remove the access code and add the credits back into your account.

Managing Your Account

Overview of Manage Your Account

The Manage Your Account function provides the Administrator with the following capabilities:

- Online purchase of credits from a Parent Account (if activated)
- Transfer credits to Parent Accounts
- Sub Account Management
- Activity Reports about your use of the EPIC system
- Unassign or Remove Access codes from Respondents
- Make changes to the Folder and Sub Folders you use to store your respondent information

Purchase Credits from a Parent Account allows you to purchase credits directly from an account above you (parent account) in the EPIC account hierarchy. You can purchase up to the maximum number credits shown in your Online Credit Limit. For more information on activating this feature, contact your Inscape Publishing Distributor.

The **Sub Accounts** section gives you the ability to send login information to your Sub Account, reset their password, transfer credits, view their current product list, add/remove products (for an individual account or for all Sub Accounts) and see a summary of reports completed by your Sub Accounts (Profile Completion Reports).

View Sub accounts for more information on working with Sub Accounts.

The **Account Activity Reports** section provides you with a number of different reports on your usage of the EPIC system. You can:

- View an Account History Report for information on:
  - When credits were purchased – both through a line of credit established by your Inscape Publishing distributor or through Inscape Customer Service
  - When credits were transferred to a Sub Account or a Parent Account
  - When credits were received from a Sub Account or a Parent Account
- Review Profile Usage with a detailed or summary analysis of the profiles/reports you've created in your EPIC system. View Profile Completion Reports for more information.
- Get a list of all reports where the access code has been issued but the report has not yet been completed. View Pending Credits Report for more information.

The **Unassign Access Codes/Reclaim Credits** function can return credits to your account by removing or unassigning access codes from Respondents who have not completed a profile that you assigned through EPIC. View Unassign Access Codes/Reclaim Credits for more information.

Folder Maintenance gives you the ability to manage your storage folders. You can rename, delete, transfer contents and create new Folders and Sub Folders. See Using Folders to Organize your Data for more information.

Credits Charged for Reports shows the current credit charge for each of the reports in your EPIC system. View Credits Charged for Reports for additional information.

Purchasing Credits from a Parent Account

Important Note: This feature needs to be activated by your Parent Account before the functionality described below is available.

Menu Location: Manage Your Account

Credits can be immediately added to your account using the Purchase Credits from Parent Account feature. (Note: You can also purchase credits by calling your Inscape Publishing Distributor.) In most cases, the parent account selection list that is displayed will have one name listed. The parent company name is displayed along with the credit limit that they've assigned to your account. If more than one name is listed, it indicates that multiple parent accounts have assigned you a Sub Account Credit Limit and you will need to select the account for the purchase.

The online credit limit is the maximum number of credits you can purchase at any one time through the Purchase credits online feature. The **Credits Currently Available for Purchase** field also affects the amount of credits you can purchase.   This field indicates the number of credits remaining in your online credit limit. If you place an online order for credits and it has not been processed by your parent account, the pending credits amount reduces the number of credits you can buy.

Example:

Online Credit Limit:	300
Credits Currently Available for Purchase:	250

In this example, 50 credits were purchased online and the parent account has not processed the order. You are only able to purchase an additional 250 credits through the online purchase function until the order is processed. Once your Parent Account has processed the order, both the Online Credit Limit and the Credits Currently Available for Purchase would display 300.

A comment field is available for use during the online purchase process. Comments entered in this area will be displayed to your parent account and will also be displayed in your Account Activity Reports

Reports

There are a number of system activity reports available in EPIC that provide you with the capability to track your EPIC system usage and the activity of your Sub Accounts. These reports provide information on the products for which you've issued access codes, reports that are pending, and a history of your account activity. See Account Activity Reports for more information.

There is also a Profile Completion Report that will display the number of reports generated by your Sub Account(s). For more information See Manage Individual Sub Accounts.

Account Activity Reports

Menu Location: Manage Your Account

The **Account Activity Reports** section provides you with a number of different reports on your usage of the EPIC system. You can:

- View an Account History Report for information on:
    - When credits were purchased
    - When credits were transferred to a Parent or Sub Account
    - When credits were received from a Parent or Sub Account
- Review profile completion statistics with a detail or summary analysis of the profiles/reports that have been completed in your EPIC account. See Profile Completion Reports.
- Get a list of all reports where the access code has been issued but the report has not yet been completed. See Pending credit reports.
- Review a listing of all of the profiles/reports that you've Unassigned during a specific time period. See Unassigned Access Codes Report.
- View a list of all records that you've moved from your account to one of your Sub Accounts. See Records Moved to Sub Accounts Report.

All of the account activity reports are in PDF format. You will need Adobe reader 5.0 or higher to view or print the report.

Account History Report

Menu Location: Manage Your Account>>Account Activity Reports

The Account History Report page displays activity for your EPIC account for a selected date range. The history report provides information on:

- Number of Sub Accounts that were added to your account
- Number of credits purchased through your Inscape Publishing Distributor or added directly to your account by Inscape Publishing Customer Service
- Number of credits transferred **from** your Account **to** a Sub Account
- Number of credits transferred **to** your Account **from** your Sub Account
- Number of credits purchased by your Sub Account from your account using the Sub Account Credit Limit feature

The report is in PDF format. You will need Adobe reader 5.0 or higher to view or print the report.

Profile Completion Reports

Menu Location: Manage Your Account>>Account Activity Reports

The Profile Completion Reports (Detail and Summary) allow you to review profile completion activity in your account. The report criteria screen shown below, allows you to select the

criteria for your report. If you want to see all reports completed during a specific time frame, enter data in the start and end dates. Use the other criteria field to customize your report.

Report Criteria	?
Start Date:	5/1/2007
End Date:	5/3/2007
Product Family:	-- None Selected --
Product:	-- None Selected --
Language:	-- None Selected --
Supplemental Report:	-- None Selected --
Folder:	-- None Selected --
Sub Folder:	-- None Selected --

The **Profile Completion - Detail Report** shows all **completed** profiles that meet the selection criteria that you select on the report criteria screen.

The profiles that meet the selection criteria will be displayed and show you the following information:

- Respondent name for individual reports or participant's names for comparison reports
- Respondent email address
- Folder and Sub Folder where the report is stored
- Names of any supplemental reports that were completed (if applicable to the specific profile/product)
- Date the profile was assigned
- Date the profile was completed
- Viewing rights (Is the report available for the respondent to view online)
- Number of credits charged for the report

The **Profile Completion - Summary Report** uses the same report criteria screen but returns a summary view that shows the total number of profiles completed and the number of credits that were used.

Both reports are displayed in PDF format and can be printed or viewed using Adobe Reader 5.0 or higher.

See Profile Completion - Detail and Summary Reports for Sub Accounts for information on generating Profile Completion Reports for your Sub Accounts.

Pending Credits Report

Menu Location: Manage Your Account>>Account Activity Reports

The Pending Credits Report provides you with an easy way to find reports where the access code has been issued, but the respondent has not yet completed the profile.

You can use the Report Criteria screen to narrow your report results or leave all fields with the default 'None Selected' option to return all pending reports in your system.

This report displays the following information on each pending report:
- Name of respondent
- Email address for the respondent
- Folder and sub folder where the respondent information is stored
- Date the profile was assigned
- Number of credits charged for the report

This report can be very useful if you're trying to determine if all participants for a class have completed a profile. (Note: All participants for the class would need to be stored in the same Folder/Sub Folder to facilitate this search.) This report can also be a useful step in determining if there are unused access codes that you can reclaim. See Unassign Access Codes/Reclaim Credits for more information on this topic.

The report is in PDF format. You will need Adobe reader 5.0 or higher to view or print the report.

Unassigned Access Codes Report
Menu Location: Manage Your Account>>Account Activity Reports

The Unassigned Access Codes Report provides you with an easy way to find all reports where you have reclaimed or unassigned the access code.

You can use the Report Criteria screen to select a date range for the report.

This report displays the following information on each unassigned report:
- Name of respondent
- Product Name and Language
- Folder and sub folder where the respondent information is stored
- Date the profile was assigned
- Date the profile was unassigned

See Unassign Access Codes/Reclaim Credits for information on unassigning or removing an access code for a respondent.

The report is in PDF format. You will need Adobe reader 5.0 or higher to view or print the report.

Records Moved to Sub Accounts Report

Menu Location: Manage Your Account>>Account Activity Reports

The Records Moved to Sub Accounts Report provides you with an easy way to find all records that you've moved from your account to one of your Sub Accounts.

You can use the Report Criteria screen to select a date range for the report.

This report displays the following information on each moved report:

- Access Code
- Name of respondent
- Product Name and Language
- Date the profile was assigned
- Date the profile was unassigned
- The date the record was moved
- The account where the record was moved

See Moving Records to Sub Accounts for information on moving records from your account.

The report is in PDF format. You will need Adobe reader 5.0 or higher to view or print the report.

Unassign Access Codes/Reclaim Credits

Menu Location: Manage Your Account

The Unassign Access Codes/Reclaim Credits feature gives you the ability to return credits to your EPIC account for access codes that have been issued and the report has not yet been generated. (Note: This feature does not work for reports that have been completed.) The primary use of this feature is to reclaim credits for access codes that will not be used by the respondent or where the access code might have been sent to an incorrect email address.

Use the search screen to find the access codes that need to be unassigned. The search results screen allows you to select individuals in two different ways. You can select an individual name by clicking the check box in the left column of the search results screen and then clicking on the Next button at the bottom of the screen
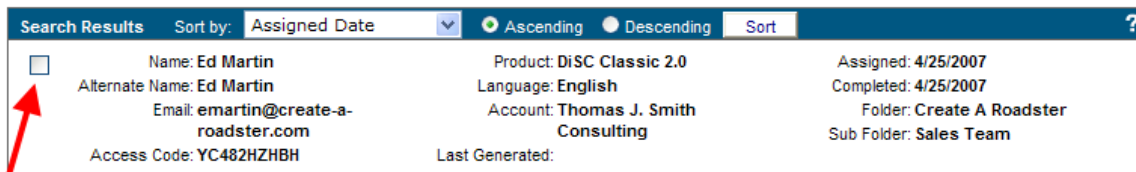
or, you can unassign access codes for **all** individuals returned by the search by clicking the Select All button at the bottom of the screen.

The confirmation screen shows all of the access codes that have been selected. To remove a name from the list, remove the checkmark in the Unassign column.

If a yellow highlight bar appears in the list, it indicates that a profile has already been started by the respondent.   These access codes can also be unassigned but you should review the highlighted entries and make sure that you've selected the proper records.

The unassign process provides you with an option to send an email note notifying the respondent that they no longer have access to the profile. The system default sends the email to the respondent. Remove the checkmark if you do not want to send the confirmation email.

Note: Inscape does not advocate removing a profile from a respondent without prior notification. It is strongly recommended that you use the confirmation email feature as part of the unassign process.

Once the list is correct click the **Unassign Access Codes** button at the bottom of the screen.

If the email option has been selected, you can also add Custom Email Messages to the note that is sent.

Your credit balance on the EPIC system will be incremented based on the number of credits associated with the report(s) that were unassigned.

Credits Charged for Reports
Menu Location: Manage Your Account

The Credits Charged Summary Report shows the current number of credits needed to produce each of the reports installed in your EPIC system.

The report is in PDF format. You will need Adobe reader 5.0 or higher to view or print the report.

Maintaining Your Personal Options

Overview of Personal Options

The Personal Options function is used to maintain or change information about your EPIC account. You can also create personalized sample reports, change your UserID and password, and view the EPIC privacy statement that outlines how the data gathered in EPIC is stored and maintained.

The **View/Edit Account Information** area is used for viewing and editing information pertaining to your administrator account.   You can change your company information (e.g. administrator name, company name, address, phone, etc.), upload your company logo, and set defaults for EPIC system features. To learn more about these features see View/Edit Account Information.

See Create Sample Reports for information on generating EPIC sample reports with your logo and contact information on the front cover of the report.

Use the **Change User ID/Password** function to change the User ID/Password for **your** administrator account. Passwords need to be at least five characters in length and can be any combination of letters, numbers or special characters. See Change Your User ID/Password.

View/Edit Account Information

Menu Location: Personal Options

The View/Edit Account Information page displays all of your personal EPIC administrator account information and your default settings for using the EPIC system. You can use this function to change the following information for your EPIC Account:

- Company Information - Company Name, Administrator Name, Email address and Email 'From' Name
- Contact Information - Five lines of fully customizable text displayed on the report cover for reports generated from your EPIC account
- Company Logo - Image displayed on the report cover for reports generated from your EPIC account
- Company URL - Address for your web site displayed to a Respondent following completion of an online profile
- Language Options - Option for multilingual display of the EPIC administrator site and setting the default language option when assigning profiles
- Custom Email subject line - Used on the assign access codes email
- Credit Reminder - Low balance indicator that reminds you when you're getting low on credits
- Email Format - Choose between HTML or text based style for email notes sent from EPIC
- Completion Notification - Yes or No option that can be used to determine whether you receive email notification when a respondent completes an assessment
- Advanced Options - Allows you to control the EPIC session timer and the default viewing option when assigning access codes for individual reports.

Important Note: The Save Changes button at the bottom of the View/Edit Account Information screen must be clicked to save any changes you make on this page.

Company Information

Menu Location: Personal Options>>View/Edit Account Information

This section displays the Company Name, Administrator Name, the User ID, Email Address and Email 'From' Name for the administrator account.

The **Administrator name** is used in the subject line of all Email notes sent to respondents when using the EPIC system default Email subject line. For example: If the Administrator Name is Thomas J. Smith, the subject line of the Email note providing a respondent with the access code for an online profile will read:

Thomas J. Smith has registered you for [Product Name]

The [Product name] field is variable depending on the profile that is being assigned (e.g. DiSC Classic). Make sure any changes you make to the Administrator Name field work in the context shown above.

EPIC uses the information in the **Email address** field for all communication about your account. This includes confirmation of credit purchases, notice of changes to your account (e.g. addition of new products), and Completion Notification when a respondent completes a profile. You can add more than one email address to this field if you want to have multiple individuals receive these EPIC communications. Just separate each of the Email addresses with a semi-colon (;).

The **Email 'From' name** allows you to select what will be displayed in the **From** area of assign access code email notes sent from the EPIC system. The system default 'From' name is Online Access Code. You may want to insert your name or some other identifying name in this area to give access code recipients an easy way to identify email notes sent from EPIC. See Email Messages for additional information.

Important Note: The Save Changes button at the bottom of the View/Edit Account Information screen needs to be clicked to save any changes you make on this page.

Contact Information

Menu Location: Personal Options>>View/Edit Account Information

The information you provide in the Contact Information text boxes is used in the following locations:

- Report cover for all reports generated by the EPIC system
- Signature block for all email messages sent by the system to Respondents and Sub Accounts

- Initial splash page and final thank you page that the Respondent sees when completing an online profile.

The information entered into these seven lines of text is displayed exactly as you type it. Please insure that you enter the information correctly. Each line of text is limited to 50 characters.

Notes:

- The EPIC system requires you to supply at least the first line of information.
- **Important Note: The Save Changes button at the bottom of the View/Edit Account Information screen needs to be clicked to save any changes you make on this page.**

Company Logo

Menu Location: Personal Options>>View/Edit Account Information

This feature allows the administrator to load a customized company logo into the EPIC system. The logo will be displayed on the welcome (splash) page seen by the respondent as they start taking an online profile and on the cover page of all reports generated by the EPIC system.

If you do not have a logo, you can skip this section. EPIC will automatically adjust the page layout for 'no logo' and will only display the Contact Information (seven lines of text) you entered.

See Uploading your Logo for additional details on this topic.

Important Note: The Save Changes button at the bottom of the View/Edit Account Information screen needs to be clicked to save any changes you make on this page.

Uploading your Logo

Menu Location: Personal Options>>View/Edit Account Information

EPIC supports JPG and GIF file formats for uploading logos. To get the optimal results for your logo, you should use the following criteria:

File Type: JPG or GIF
Size: 750 X 750 pixels
Resolution: 300 DPI

If your logo is smaller or larger than the recommend size, the system will automatically size the logo to fit the available space on the cover of the profile. If your logo is multi-colored, EPIC will upload a color version and create a black and white version for use when you select the B/W print option for printing the report.

Company URL

Menu Location: Personal Options>>View/Edit Account Information

The Company URL (Uniform Resource Location) field allows you to enter an address for **your** website. This URL is displayed to the respondent at the completion of an online profile with directions to click on the link if they want to be transferred to the location/website provided in the Company URL field. If the URL is not entered, the directions for transferring are not displayed to the respondent and only the Contact Information is displayed to the respondent upon completion of the profile.

Important Note: The Save Changes button at the bottom of the View/Edit Account Information screen needs to be clicked to save any changes you make on this page.

Language Options

Menu Location: Personal Options>>View/Edit Account Information

The Site Language option allows you to select the display language for the EPIC administrator site. Once you select the language and click the Save changes button at the bottom of the screen, the EPIC site will be converted to the language selected. The languages currently available are displayed in the drop down box in the Site Language field.

The Default Product Language field allows you to set the default language that will be displayed when assigning access codes or anytime the Search Criteria page is displayed. The languages that are available in your EPIC account are displayed in the drop down box. Information on accessing Inscape's multilingual EPIC profiles is available from your Inscape Publishing Authorized Distributor.

Custom Email subject line

Menu Location: Personal Options >> View/Edit Account Information

A custom email subject line can be created and used when assigning access codes in EPIC. A default email subject line is provided, but there may be cases where you want to personalize or customize the subject line to meet specific requirements.

In the Email Subject Line section, click the Custom Subject button and enter the text that you want to use when assigning access codes.

There are also five dynamic fields (system variables) that can be used in the custom subject line.

These system variable fields are dynamically filled in at the time the access code is sent. If you want to include one of these dynamic fields in your subject line, select the variable from the list and then position the cursor where you want the variable to be placed in the custom subject line. Then click the Insert button. For instance, if you'd like to include the respondent's name and the profile/product name in the custom subject line your email subject line could be set up as follows:

[RESPONDENT NAME], the email contains an access code for the [PRODUCT NAME] profile

Note: Any misspellings, improper structure (removing the brackets around the system variable fields), or incorrect spacing in the subject line will be displayed on all email notes that are sent out when assigning access codes. The Email subject line cannot be left blank.

Once you have created your custom email subject line, click the Save Changes button at the bottom of the View/Edit account information page to save your changes.

Important: Please be sure to check your results before assigning access codes. Scroll down to the Email Subject Line section on the View/Edit Account Information confirmation page and review the changes you made. Your custom text and a sample of how the subject line will look in the email are provided. Please note that the system variable fields are not filled in on the confirmation page. They are only populated when the access code email is sent.

See Custom Email Subject Line - One time change for information on temporarily changing the Email subject line for a select group of access codes.

Manage Report Tailoring

Menu Location: Personal Options>>Manage Report Tailoring

A subset of the reports in EPIC can be tailored or modified to meet your training needs. The tailoring feature lets you reorganize pages in a workbook/report and also delete selected pages. It does not allow changes to the content on a specific page or the import of new pages into the system. If you have tailorable reports loaded in your EPIC account, the **Manage Report Tailoring** menu option will be displayed.

To create a tailored report, select the Create a New Tailored Report button at the bottom of the page.

Once you've created a tailored report, it can be edited or deleted using the appropriate link. The file name, report title, and tailored product name are shown in the tailored product list to help you identify your tailored reports.

If you delete a tailored report that has access codes assigned, a warning message will be displayed indicating that there are access codes associated with the report you are deleting. Deleting a tailored report that has access codes assigned will cause the access codes to revert to the original (default) page order of the report.
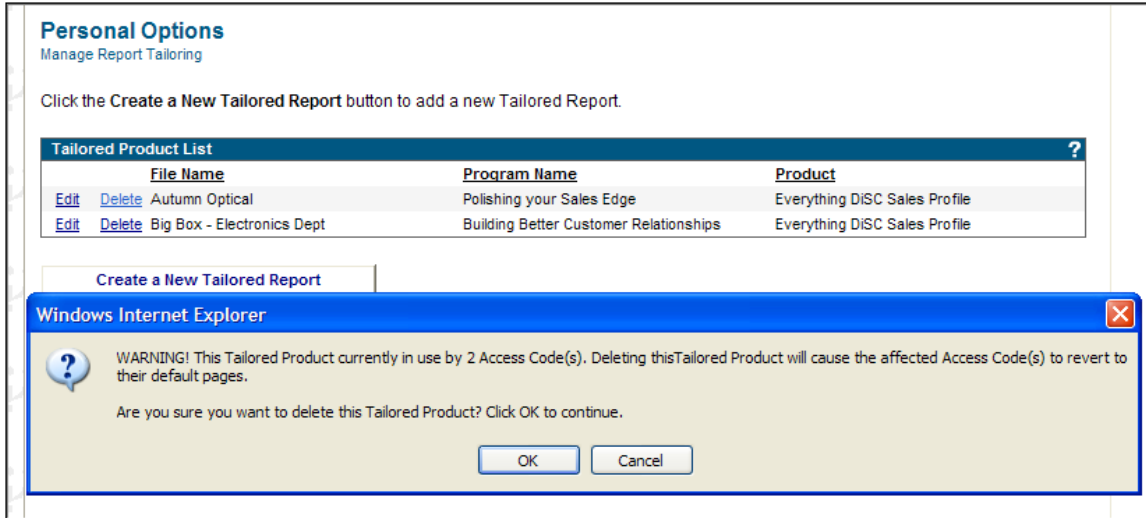
See Report Tailoring - Getting Started for additional information.

Report Tailoring - Getting Started

Menu Location: Personal Options>>Manage Report Tailoring

Reports that are eligible for tailoring are displayed in the Product Family and Product drop down boxes during the tailored report creation process.
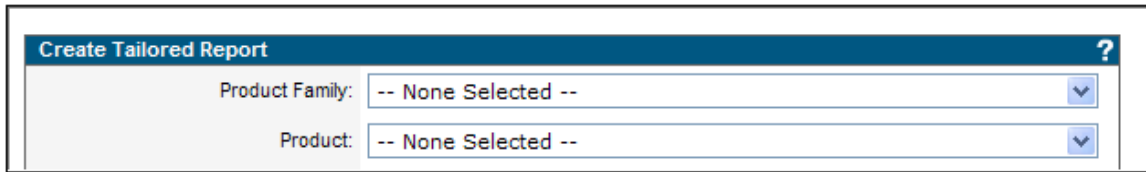
Once a tailorable report is selected, the Create a New tailored Report screen is displayed. The screen is divided into two sections. The top section is used to identify your report and customize the name. The bottom section is used to rearrange and customize the report.

In the top section, the **File Name** area is used to help identify your tailored report in your EPIC account. This field is limited to 45 characters and is only used as an identifier. It is not displayed on the report.

The **Program Name** area lets you use the default program name assigned to the profile or enter your own unique name. If you enter your own program name, it will be used on the report cover and on the splash page that the respondent sees when completing the online responses for the profile. Use the **View the Report Cover** links to determine how the text you entered fits on the report. The program name text box allows you to enter an unlimited number of characters, but 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. View a Sample of the Report cover (either color or black/white) to make sure your text fits.

The **Description** area allows you to enter additional background information on your tailored report. It is not displayed on the report.

See Report Tailoring - Rearranging and Deleting Pages for more information.

See Report Tailoring - Assigning an Access Code for information on assigning an access code for a tailored report.

Report Tailoring - Rearranging and Deleting Pages

Menu Location: Personal Options>>Manage Report Tailoring

Report tailoring lets you rearrange and remove pages from selected reports. Once the report has been selected (see Manage Report Tailoring for additional information), all of the pages of the report are shown in the box on the lower portion of the screen.

The pages can be displayed in different formats using the following controls:

- Click on **Show All** to reveal all levels of the report, including page pictures.
- Click on **Hide All** to collapse the report to the highest level of the outline.
- Click on the "**+**" next to each **Section Title** to expand the list of pages contained in a section. Click on the "**-**" to collapse the section list.
- Click on the "**+**" next to each **Page** to view a picture of that page. Click on the "-" to hide the picture.

To change the order of the pages in the report, click on the page and click **Move Up** or **Move Down** until the page is positioned where you want it.

Note: You cannot move a page outside of its section, nor can you rearrange section order.

To remove a page, click on the page and then click on **Remove Page**. You will be asked if you are sure you want to remove the page. If so, click **OK**. If not, click **Cancel**.

Note: Sections cannot be removed when tailoring a report. You can choose to withhold or 'not display' a section from the report during the assign access code process on the report options page.

Clicking **Reset Pages** will restore the reports original report content and page structure. If you click on this function, you will be given an alert and an opportunity to cancel.

Click the Save button at the bottom of the screen when you complete your report changes.

Important Note: If you've assigned access codes for a tailored report and then make changes to your report structure or use the Reset Pages function to restore the original format, all individuals that have not completed the report will see your updated report when they complete their profile and generate their report. Once access codes have been assigned, the Change Report Content feature can also be used to allow your respondents to see a different tailored report or to have them see the system standard non tailored report

Report Tailoring - Assigning an Access Code

Menu Location: Manage Reports>>Create a New Report/Issue Access Codes

Once a report has been tailored, it can be used during the Creating New Reports process. The tailored reports are stored within their original Product Family and Product category. For instance, to locate a report that you tailored for the Everything DiSC Sales Profile, you would select the Everything DiSC **Product Family** and then the Everything DiSC Sales Profile.

The tailored reports you created are displayed on the Report Options Page during the assign access code process in the Product Tailoring section.

Note: If you choose **None Selected**, the standard report will be assigned.

The product tailoring section will only appear on this screen if you have created a tailored version of the product. See Manage Report Tailoring.

Email Format

Menu Location: Personal Options>>View/Edit Account Information

The EPIC system default for the email message format is **Text**. The text format is one that all e-mail programs understand.   However, the text format doesn't support bold, italic, colored fonts, or other special text formatting.

The **HTML** email format supports text sizing, numbering, bullets, tables, horizontal lines, graphics, and linking to Web pages. Most popular e-mail programs support HTML formatted email. The Custom Email Message Library provides you with an HTML editor that allows you to take advantage of these features. (Note: You will not see the HTML editor in the Custom email message library if the Text format is selected.)

See HTML editor for additional information.

Credit Reminder

Menu Location: Personal Options>>View/Edit Account Information

The Credit Reminder informs you that your credit balance on EPIC is running low. EPIC will automatically send a note to the email address of the administrator when the credit balance in EPIC reaches the number entered into this field. The email note is a reminder to the administrator that the credit balance is low and additional credits should be purchased. Credits can be purchased by contacting your Inscape Publishing Distributor.

When the low credit reminder is reached, the credit balance number displayed in the upper right corner of you EPIC screen will change to a **red** color. This is an additional reminder that your balance is low.

If you have Sub Accounts associated with your EPIC account, you will receive a copy of the Email that is sent to the Sub Account administrator when the Sub Account reaches the low credit reminder.

Important Note: The Save Changes button at the bottom of the View/Edit Account Information screen needs to be clicked to save any changes you make on this page.

Advanced Options

Menu Location: Personal Options>>View/Edit Account Information

The **Session Timeout** option allows you to control the inactivity timer for your EPIC session. As a security feature, the timer automatically logs you off of EPIC when no activity is occurring. The default setting will lock your EPIC session after 20 minutes of inactivity. The range of values for the Session Timeout is 20 – 120 minutes. The number of minutes before your session times out is displayed in the upper right corner of the EPIC administrator site along with your User ID and your current credit balance.
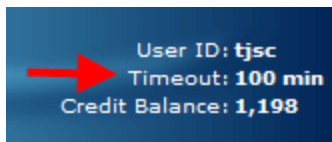
Each time EPIC sees activity from your computer through a mouse click of a menu option or one of the buttons in the system, the timer will start its count down again at the value set in your session timeout option.

The **View Report Online Default** controls the Report Viewing option that is displayed when assigning individual access codes or when entering Tally box scores to create reports.

If the View Report Online default feature is set to Yes, each time you assign access codes, the View will be set to Yes for all respondents. (Yes is the default system value).

Likewise, if the view is set to No, the view will always default to No when assigning access codes. The view can be changed on a case-by-case basis when assigning access codes regardless of the value set in the View Report Online Default.

Completion Notification

Menu Location: Personal Options>>View/Edit Account Information

Completion notification is a **Yes/No** option used to control notification to the EPIC account administrator of completion of an on-line profile by a Respondent. Each time a respondent completes an on-line profile and the flag is set to **Yes**, the administrator will receive an email message from EPIC with completion notification. If the flag is set to **No**, the email message is not sent.

This is a global setting for EPIC and cannot be set for a specific profile or respondent. This means that as long as the flag is set to **Yes,** the administrator will receive notification for all profiles completed by respondents.

If you have more than one email address in the email field in the Company Information section, all of the address listed will receive the completion notification. See Company Information for additional information.

Important Note: The Save Changes button at the bottom of the View/Edit Account Information screen needs to be clicked to save any changes you make on this page.

Custom Email Message Library

Menu Location: Personal Options

The Custom Email Message Library allows you to create and store custom email messages that can be used anytime email messages are sent from EPIC. This includes assigning or resending access codes, unassigning codes, transferring credits, etc.

Click the **Create a New Message** button to create and save a new email message. Click **Edit** to work with an existing message, or **Delete** to remove a message from your library.

Custom Email Messages			?
Message			
Marketing Message	Edit	Delete	
Message from HR Director for Company A	Edit	Delete	
Training reminder - pre work	Edit	Delete	
Versa Company Prework	Edit	Delete	

Create a New Message

Once stored in the library, the messages can be recalled and inserted into email notes anytime EPIC provides you with an option to insert Custom Email Messages .

If you've selected the HTML email message format, you will also be able to customize your custom email messages using the HTML editor.

This editor allows you to improve the look of your custom email message by using formatting features like text sizing, numbering, bullets, tables, horizontal lines, graphics, and linking to Web pages. (See HTML Editor for additional information.)

There are also five dynamic fields (system variables) that can be used in custom messages.

-- Select a System Variable --
-- Select a System Variable --
[RESPONDENT NAME]
[ACCESS CODE]
[ADMIN COMPANY NAME]
[ADMIN NAME]
[PRODUCT NAME]
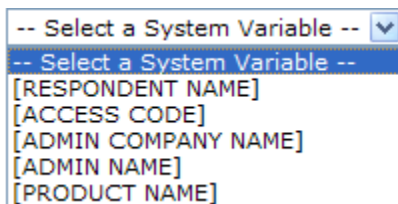
These system variable fields are dynamically filled in at the time the email message is sent. If you want to include one of these dynamic fields in your custom email message, select the variable from the list and then position the cursor where you want the variable to be placed in the message. Then click the Insert button.

To insure that your custom messages are formatted correctly, it is recommended that you create your custom message then assign yourself an access code to verify the layout. The code can be unassigned and the credits returned to your account using the Unassign Access Codes/Reclaim Credits function.

Create Sample Reports

Menu Location: Personal Options

You can create personalized samples for all profiles loaded in your EPIC account. The samples allow you to control report content (when applicable) and produce a report that is personalized with your logo and contact information.

Once the report is generated, it can be printed, emailed with Custom Email Messages, or saved to disk.

Change Your User ID/Password

Menu Location: Personal Options

You can control the log-in process for your EPIC account by changing the User ID and/or the Password fields that control your account access. The selection box lets you change the User ID field, the Password field, or by selecting the combination User ID and Password option, you can change both of your log-in fields at the same time. Once the Next button is clicked at the bottom of the screen, the new User ID and/or Password that you selected are active and will be required the next time you log-in to the system.

Your password must be at least five characters in length and can be any combination of numbers, letters, or special characters.

User ID's in EPIC must be unique. If the User ID you select has already been used by another EPIC system user, you will need to make another selection. Adding a prefix or suffix to a common User ID (e.g. jsmith01, 1jsmith) will in most cases, create the unique ID required by the system. Your User ID cannot contain blank spaces or use any of the following special symbols: ( ) < > @ , ; : \ " [ ] * / | ?

You will receive a confirmation screen when you successfully change either of these fields.

See Password for more information.

Password

Your password should be a combination of letters, numbers, or special characters. Do not select passwords that are easy to break such as your family name, phone numbers, or birth date.

If you cannot remember your password, EPIC allows you to retrieve it by clicking on the **Having Trouble Logging in** link on the sign-in page.
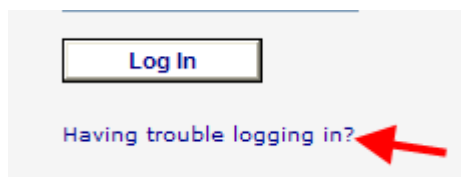
When you click on the link you will be able to retrieve your login information by providing either your EPIC UserID or the email address for your EPIC account. EPIC will send the login information to the email address that is stored in the system.

You can also contact your Inscape Publishing Distributor for assistance with resetting the password on your account.

Parent accounts can reset passwords for all their Sub Accounts. See Reset Sub Account Password for more information.
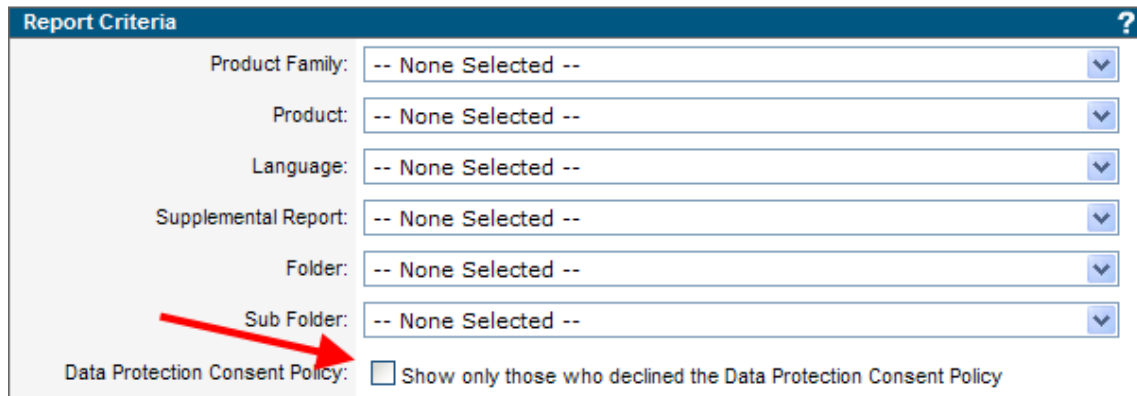
General System Information

Data Protection Consent Form

Multi-lingual versions of EPIC products utilize a Data Protection Consent form to inform the respondent of Inscape's data protection and storage policy. When a respondent to one of Inscape's multi-lingual profiles clicks on the access code link to respond to the on-line profile, they will be presented with a statement of Inscape's Data Protection Policy. The respondent **must Accept** the terms before they can complete the profile. When **Do Not Accept** is clicked, an email note is sent to the administrator advising of the respondent's selection.

The respondent can change his or her Do Not Accept selection by clicking on the access code link again and accepting the terms. Access codes for individuals that do not accept the terms of the Data Protection Policy should be reclaimed using the Unassign Access Codes/Reclaim Credits feature.

Individuals who reject the data privacy policy can be located using the Pending Credits Report and selecting the check box showing respondents who have rejected the data privacy report.

Data Protection Policy

Inscape's Data Protection Consent Form is designed to meet the conditions outlined by the European Union Directive 95/46 and UK Data Protection Act 1998, relating to the protection of individuals with regard to the processing of personal data.

The following statement is presented to a respondent for all 'non-US English' profiles:

> By clicking **Accept**, you agree that Inscape Publishing, Inc. can use the data, including personal data you enter on this web site, for the purpose of generating your [profile name] report. You will be required to provide your name and respond to a series of questions, words, or statements that will be used to create your customized report. Optionally, you can provide demographic information that will be used by Inscape Publishing for continued validation of this report. This consent form sets out the manner in which your responses will be collected, processed, transferred, used, and stored. This consent form will also set out your rights of access and correction to your personal data.

The data, including personal data, you provide to us through this web site will be transferred to the United States and stored on Inscape Publishing's secure server located in Minneapolis, Minnesota. Your [profile name] report will be provided to you in one of two methods depending upon the option selected by the individual (administrator) that sent you the access code for this profile:

1. Immediate availability of the report through this web site. If this option has been selected, you will be presented with choices to View, Print, Save, or Email your report upon completion.
2. Physical delivery of the report by the administrator.

The report delivery option selected by your administrator will be displayed to you upon completion of the response section of this web site.

Access to your personal data and any demographic information you supplied is restricted to authorized personnel and staff at Inscape Publishing, Inc. The administrator that sent you the access code has access to the completed report – not the individual data items and responses provided by you or the optional demographic information.   If you choose to provide additional demographic information, this information, together with your individual responses, is used for research purposes only. It will not be provided to the administrator or any third parties and is not linked to your name or any other identifiable personal information. Inscape Publishing will not transfer your data to any third party or make the data available for use outside of its system.

Your completed report will be stored in an electronic database maintained by Inscape Publishing. The report will be available to the administrator via a web site that is secured by unique user ID and password. The administrator may access your report for the purpose of reprinting or for use in the generation of group reports. These group reports give the administrator the ability to include your individual report information with other individuals for the purpose of generating overview or summary reports for groups of individuals. (e.g. a work team)

You have the right to access your personal data at reasonable intervals. If you consider any of your personal data to be incorrect, you will be able to request that we change it. Please contact:

Inscape Publishing, Inc.

6465 Wayzata Blvd, Suite 800

St Louis Park, MN, USA 55426

After reading the content of this consent form, you must indicate whether or not you consent to its terms.

Clicking **Accept** is confirmation and acknowledgement that you have read the above statements and consent to provide the information required to generate your [profile name] report. You also agree to the data gathering, usage, processing, dissemination, transfer, and storage of your personal data, including the transfer of your personal data

to the USA and the processing and storage of that data in the USA, within the limits set out above.

Clicking **Do Not Accept** will send a message to the administrator and will inform him or her that you do not agree to take part and do not consent to the data storage, transfer, and use terms outlined above. You will not be allowed to complete the profile.

Searching for Records

The EPIC search capability is a very powerful function that allows you to find and retrieve records that are stored on the system.

General Search Tips

There are a number of criteria fields on the search screen (shown below) that allow you to find records. **You do not need to fill in all of the search criteria fields to retrieve a record** but filling in more than one field usually refines the search and returns fewer records. This helps you locate the record you want without having to scroll through a large number of records on the search results screen.

You can use partial information to locate records in the folder, sub folder, email address, and name fields. For example, if you type **art** into the Name field, the system will search for all the names that contain the letters **art** and return results such as **Arthur** and **Martin**. Notice both names contain the letters **art**. This is very helpful when you only remember portions of a name or email address.

Search Criteria	?
Access Code Status:	Both
Access Code:	
Start Date:	
End Date:	
Product Family:	-- None Selected --
Product:	-- None Selected --
Language:	-- None Selected --
Supplemental Report:	-- None Selected --
Folder:	-- None Selected --
Sub Folder:	-- None Selected --
Email Address:	
Name:	
Results Per Page:	10

Search Criteria Fields

Access Code Status: The Access Code Status determines the state of the profile assigned. A profile can be in a pending or completed status. If you only want to retrieve completed reports, you would select the completed option in the Access Code status field. The Both option retrieves pending and completed records.

Begin Date: Starting date for a search.

End Date: Ending date for a search.

Sub Account: If you have established viewing rights for Sub Account records (See Viewing Sub Account Records) you can select the Sub Account to search using this field. Note: You can search all of your viewable sub accounts at the same time to locate a record by selecting the **All** option. When all is selected, only the name and email fields remain active on the search criteria screen. The other fields are no longer available for use.

Product Family: Searches for respondents who have pending or completed reports for a family of products (e.g., DiSC)

Product: Searches for respondents who have pending or completed reports for a specific profile within a family of products (e.g., DiSC Classic 2 within the DiSC Product Family)

Product Language: Selects the desired language (e.g., Spanish, German, etc.) for the product or report.

Supplemental Report: Searches for respondents or reports associated that have a particular supplemental report assigned. (Note: Not all products have supplemental reports available.)

Folder: Searches for records stored within a particular folder.

Sub Folder: Searches for records stored in a sub folder within a folder.

Email Address: Searches for respondents or reports with a particular email address.

Name: Searches the name field, alternate name field, and group report participants for a match.

Results Per Page: Allows you to display between 10 – 100 records per page on the search results screen. The system default for records per page is 10. If you increase the number per page, the search results screen may take longer to display.

The records are returned in descending date order based on the date that the access code was assigned.

If you want to **view all completed or all pending records** in your EPIC account, select the appropriate access code status, and leave the remaining search criteria fields blank. Then click the Search button at the bottom of the screen.

Search Results

Search results are returned in descending order by the date the profile was assigned. The order of the search results can be changed by using the **Sort By** function at the top of search results screen.
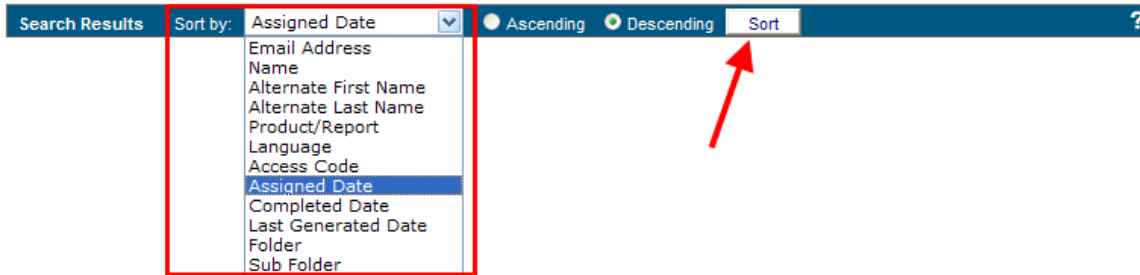
Select your sort criteria and whether you want the list in ascending or descending order. Then click the Sort button.

The search results page shows you the number of records that we're found that met your search criteria.

You can control the number of records that are displayed on the page by setting the Results Per Page option on the Search Criteria screen. See Searching for Records.

Search results that return large numbers of names that span multiple pages use the following page control to facilitate movement to the various pages.
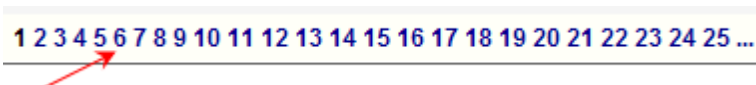
Click on a page number to immediately go to a page of results. The page number selected will change color to indicate your current location. If you select a specific record and then click Return to Search Results after working with the selected record, EPIC remembers your location in the current set of search results and returns you to the same page.

Last Generated Date: The Search Results screen also shows the last date the report was generated by the EPIC account administrator. The date field will be blank unless the report has been generated by the account administrator using the View/Print/Email completed reports feature. Generation of a report by the respondent will not enter a date in the Last Generated Date field.

Not Editable: If the words 'Not Editable' are displayed on the search results screen next to a record or group of records, it indicates that the record is a pending follow-up activity. The record cannot be edited until it changes to a completed status.

Alternate Name

The alternate name field is the name entered by the respondent when they complete the online profile. **The alternate name field is the name that is displayed on the front cover of the report.** This field may be different then the name that you entered when you assigned the online access code. For instance, you may have used a nickname or initials when you assigned the access code but the respondent may enter his or her full name when completing the profile. EPIC displays both fields when viewing respondent records so you can immediately see any difference between the two names.

When you try to locate a record by entering a name in the Search criteria screen, EPIC will search both name and alternate name field to find a match.

If a respondent enters their name incorrectly when taking the online profile, they do not have the capability to change it. As an EPIC administrator, you can change the name the respondent entered (alternate name) through the Edit Existing Reports feature.

Email Messages

EPIC makes extensive use of Email notes to inform administrators and respondents of events that have occurred.

Email notes are automatically generated by EPIC for all major events that occur in the system. An example of an event is issuing an access code.

Email notes that come from EPIC when assigning access codes will be displayed as follows:

From: Online Access Code (or the information in the **Email 'From' Name** field entered in View/Edit Account Information)

> The underlying email address that the system uses is: userID@inscape-epic.com where UserID is the information in your EPIC UserID field. In some cases, you may need to notify companies of the email address access codes are sent from so they can open the firewall or change spam filter settings.

To: Jane Olsen (Name of the respondent you enter during the assign access code function)

Subject: Thomas J. Smith has registered you for DiSC Classic

> EPIC has a standard subject line that is generated when assigning access codes. The system default combines the information in the Administrator name field (Thomas J. Smith) entered in the View/Edit Account Information with the Product (DiSC Classic) that is being assigned.

In the example above, Thomas J. Smith is the EPIC Administrator and he issued an access code for the DiSC Classic profile to Jane Olsen out of his EPIC administrator account.

If you are using the HTML option for sending email (See Email Format), the standard content from the EPIC platform will be in the gray shaded section of the note. This content is not changeable but you can add Custom Email Messages to the email that will appear before the gray shaded section. If you are using the Text option for email, the gray box will not be displayed.

See Custom Email subject line for information on changing the EPIC default subject line for assigning access codes.

A Custom Email message can also be added to many of the standard email notes that EPIC generates. See Custom Email Messages

Undeliverable Email

Any Email notes that are marked as undeliverable due to a bad email address will be returned to your EPIC account email address (entered in the Company Information section on the View/Edit Account Information page). To resend the access code, you will need to correct the email address using Edit Existing Reports feature. When the email address is corrected, the access code will be resent.

Custom Email Messages

The **Custom Email Message** feature allows you to add a personalized message to email notes that are sent by the EPIC system. The custom message is inserted as the first section of the email note that gets sent by EPIC. These custom messages can be retrieved from the Custom Email Message Library or entered on an ad hoc basis using the text box that is displayed when assigning access codes.

When assigning access codes through the Creating New Reports feature, resending login information through the Resend Respondent Login Information feature, or when you Unassign Access Codes/Reclaim Credits, the custom email message that you enter is sent to all respondents.

Custom Email Subject Line - One time change

You can override either the System email subject line default or your Custom email subject line default by selecting the '**Click OK to include a custom email message or change the subject line'**. The changes made to the email subject line using this process are only applied to the current process (e.g., assigning access codes, resending login information, etc.) It does not permanently change the Email subject lines (Default or Custom) that are created using the Custom Email subject line function.

Note: You can make a change to the email subject line without adding a custom email message. If you leave the custom email message section blank, nothing will be added to the email sent to the Respondent but they will see any changes that were made to the subject line.

If you get to this screen and decide that you do not want to make any changes, just click the OK button at the bottom of the screen. The Email subject line cannot be left blank.

HTML Editor

The HTML editor allows you to easily add special features such as images and website links as well as text features like bolding, italics, and font changes to EPIC email notes.   Note: The HTML editor will not be displayed unless the HTML option has been selected for EPIC email. See Email Format for additional information.

The HTML editor in EPIC contains many of the functions that are available in commercial word processing packages. Some of these features may require some experimentation to insure that your custom message is formatted correctly. The text area will display the features as you create them (WYSIWYG – What You See is What You Get) so you will be able to review your content. When you're through with your design, you should assign yourself an access code with your new custom message. This will allow you to review your content and insure that all of the features you've utilized are displaying properly. Once your test is complete, use the Unassign Access Codes/Reclaim Credits function to return the credits to your account.

Issue Access Codes

See Creating New Reports.

Deleting Records/Reports in EPIC

 Menu Location: Manage Reports

Respondent records for pending and completed reports can be deleted from the EPIC system using the Delete Report function.

When a completed report is deleted, all identifying information associated with the record is permanently deleted from the EPIC database. The only indicator that the report existed can be found when you run the Profile Completion Summary Report. (See Profile Completion Reports) If a deleted report falls within the date range for your summary report, it will show up in the deleted reports section at the bottom of the report. This allows you to maintain an accurate audit between credits added to your account and credits used.

Totals	
Total Reports	17
Total Credits	180
Deleted Records	
Total Reports	3
Total Credits	30

If a pending report is deleted, the credits will be returned to your account. Respondent records for **pending reports** can also be deleted by using the Unassign Access Codes/Reclaim Credits function but you will still be able to see the individuals name and email address in the Unassigned Access Codes Report. Pending reports that are deleted will be displayed in the Unassigned Access codes Report as shown below:

Individual respondent records will also be deleted from group and comparison reports as part of the delete process. If an individual record is deleted from a group or comparison report where there are only two participants and there are no edits remaining to add new participants, (Edits remaining = 0) the group report will become invalid and you will no longer be able to view or print the report through EPIC.

The delete process provides the ability to send a confirmation email to the individual letting them know that their record has been deleted from your EPIC account. The email is optional.

Using Folders to Organize your Data

Creating and using folders and subfolders within the EPIC system lets you keep track of respondents that you have entered into the system. All of your respondents can be stored in this way to help you organize records for easy retrieval.

For example, you can create a folder for each company you do business with and then create subfolders for each of the departments within a company. You could store information about the Marketing department for The Big Company in the following way:

Folder: The Big Company
Sub Folder: Marketing

Organizing your records by folder and sub folder when you enter them in the system makes finding specific individuals or groups of individuals much easier in the future. See Searching for Records.

For information on Folder management, see Working with Folders.

Working with Folders

Menu Location: Manage Your Account

The Folder Maintenance feature provides you with the ability to efficiently manage your storage folders. When you click on this option, the current folder/sub folder structure for your EPIC account will be displayed in alphabetic order. In the example below, there are two folders: North – Information Technology Dept and North – Product Development. There are

also three sub folders in the North – Information Technology Department folder (Programming, Network Support, and Executive) and three in the North - Product Development folder (Publishing, Media Management, and Production/Graphics. The numbers in parenthesis following the folder name indicate the number of records in each Folder/Sub Folder.

To use a function for a particular folder, click on the underlined folder function following the folder name.

The **Rename** function can be used to change folder or sub folder names. This is helpful if you've misspelled a folder/sub folder name or when a change occurs that requires an update to the name you assigned. The rename can be completed on a folder/sub folder whether it's empty or has records in it.

The **Delete** function is used to delete **empty** folders or sub folders. If a folder/sub folder contains respondent information, the system will not allow you to delete it. The respondent information would need to be moved to another folder/sub folder using the Transfer option or the record would need to be deleted from the system using the delete record function before the folder can be deleted (See Deleting Records/Reports in EPIC).

The **Transfer** command allows you to move all or selected records between folders and sub folders. On the left side of the screen, you can select all or selected records to be moved. On the right side of the screen, you select the folder or sub folder that will receive the records. Once those selections are made, click Transfer Reports at the bottom of the screen to complete the transfer.

The **Create Sub Folder** option is available following a folder name. It will create a sub folder within the folder grouping.

The **Create New Folder** command at the top of the page allows you to create a new folder. It will be added into your folder structure in alphabetical order.

Working With Sub Accounts

Sub Accounts

Important Note: If you do not have sub accounts associated with your EPIC account, the Sub Account menu option under Manage Your Account will not be displayed and the information contained in this section will not be applicable.

For large companies or structures that require a hierarchical structure, up to five levels of Sub Accounts are supported by EPIC. See Multi Level Sub Accounts for more information. (Contact your Inscape Publishing Distributor for assistance establishing Sub Accounts.)

All EPIC Sub Accounts have similar functionality but upper level Sub Accounts have additional capability available by using the Manage Individual Sub Accounts feature. As an upper level Sub Account, you can monitor the activity of your Sub Account(s), transfer credits, add/remove products, and do some basic account management (e.g. reset password, etc.) through the Manage Your Account>>Sub Account Selection.

Multi Level Sub Accounts

EPIC supports up to five levels of Sub Accounts in a hierarchical structure.   In the example below, **Company A – Regional HQ** has established six Sub Accounts beneath their account. **Company A – North Region** and **Company A – South Region** are level 2 Sub Accounts. (Company A – Regional HQ is the Level 1 Sub Account in the structure.) Both North Region and South Region have 1 additional Sub Account level below their accounts.

There are two features controlled by Inscape Publishing that apply to interaction between Sub Account levels:

Transferring Credits allows for **bidirectional movement of credits between Sub Accounts that are more than one level apart**. By default, when accounts are created, transfer of credits is automatically established between accounts that are one level apart in the hierarchy.

Viewing Sub Account Records allows an upper level Sub Account to see reports that have been completed by Sub Accounts beneath it in the account hierarchy.

(Note: Contact your Inscape Publishing distributor for information on activating the features controlled by Inscape.)

Manage Individual Sub Accounts
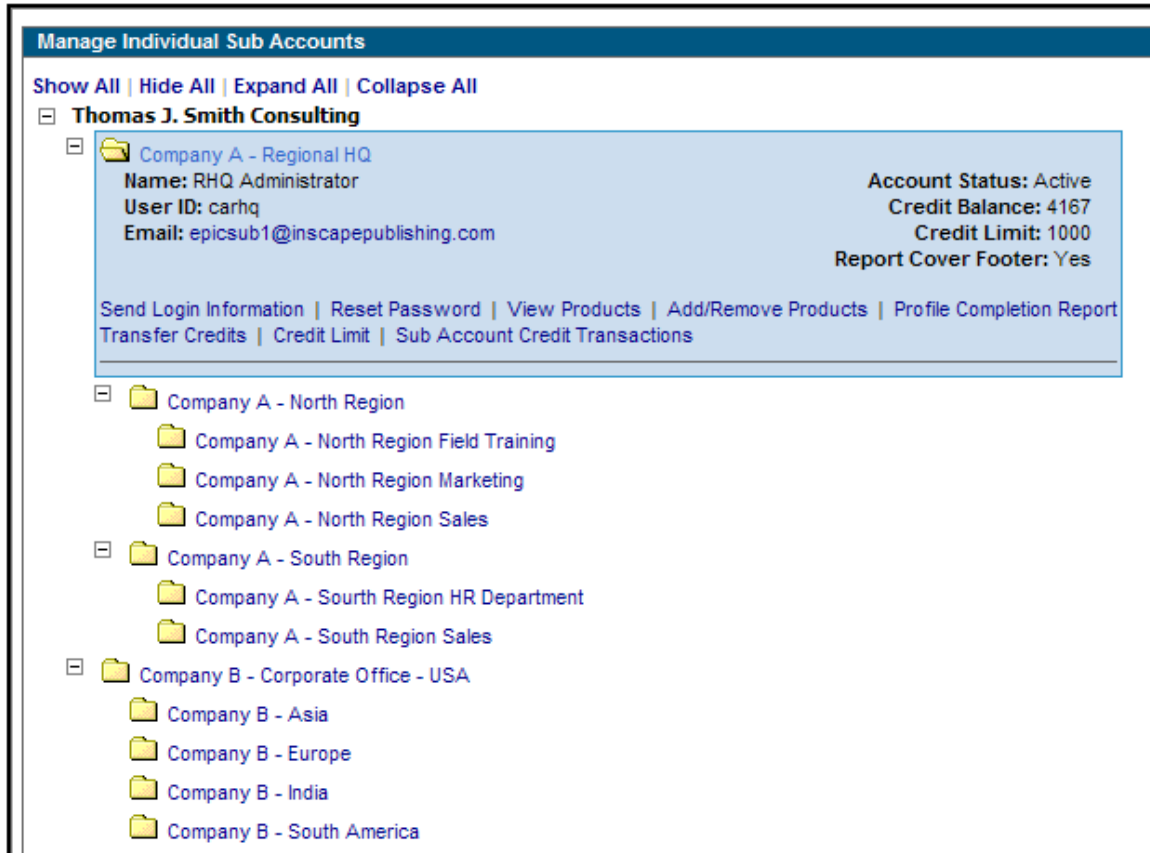
Menu Location: Manage Your Account>>Sub Accounts

This feature displays a list of all Sub Accounts attached to your EPIC account and provides a set of management options for working with your accounts. The list is initially displayed in a collapsed mode and only shows your first level of Sub Accounts. You can display your full list of Sub Accounts by clicking the **Show All** link.

The full list of your Sub Accounts provides you with the names of the Sub Account and displays the hierarchical structure. In this example, Company A – North Region is a Sub Account of Company A – Regional HQ. Company A – North Region Sales is a Sub Account of Company A – North Region.

To access the management options for a Sub Account, you need to click on the Sub Account name. The options available for the account are displayed and the account is highlighted in a blue shaded box. The information for an individual account can be expanded or collapsed by clicking on the account name.

To see the management options for all sub accounts that are displayed on the screen, click the **Expand All** link.

See the following topics for additional information on the management options and features available for Sub Accounts:

Send Sub Account Login Information

Reset Sub Account Password

Transferring Credits

Sub Account Credit Limit

Sub Account Credit Transactions Report

Sub Account Product List

Add/Remove products for Sub Accounts

Profile Completion - Detail and Summary Reports for Sub Accounts

Sub Account Credit Limit

Menu Location: Manage Your Account>>Sub Accounts>>Manage Individual Sub Accounts

Upper level accounts can establish a line of credit or credit limit for subordinate Sub Accounts. Establishing a line of credit allows the Sub Account to immediately withdraw credits from the upper level account up to the credit limit that was established. The credit limit is established on **an individual account basis** and is activated using the Credit Limit link in the expanded view for the Sub Account.

The EPIC system does not facilitate the collection of money from the Sub Account or give you the ability to reclaim credits should there be difficulty completing the financial transaction with the Sub Account.

To establish, remove, or change the credit limit for an Sub Account, click on the credit limit link. The credit limit option box is displayed.

Click on the Enable Credit Limit check box and enter the number of credits you want to establish for the credit limit. Click save and click OK on the confirmation screen to activate the credit limit. To remove a credit limit that has been established for an account, remove the check mark in the Enable Credit Limit check box. **Note: The EPIC system does not send any communication to the Sub Account when this feature is activated, removed, or changed.**

The credit limit changes will be shown in the expanded view of the Sub Account.

If the credit limit feature has not been activated, it will display N/A.

See Processing Sub Account Credit Purchases for more information.

Important Notes:

1. Once you've set the credit limit, the Sub Account has immediate access to the feature. You should communicate the addition of this feature to your Sub Account before activation.

2. You need to maintain a credit balance in your account sufficient to cover the number of accounts where a line of credit has been established. If you establish a line of credit for an account of 100 credits, but only have 50 credits in your account, the Sub Account will only be able to withdraw 50 credits. Once your account reaches a zero balance, Sub Accounts will not be able to obtain credits even though they have a credit limit established.

Processing Sub Account Credit Purchases
Menu Location: Home Page

When a Sub Account requests credits from your account through the Purchase Credits from Parent Account feature, they initiate the transaction and are able to immediately add credits to their account. This is different than the Transferring Credits to Sub Account feature where the transaction is initiated by the account sending the credits.

Since the Sub Account initiates the transaction, you need to know when these purchases have been made and you will need to process the request to restore the Credit limit for your Sub Account.

When a request has been made for credits you will receive an email note letting you know that a purchase has been made and an indicator will be shown on your EPIC home page:
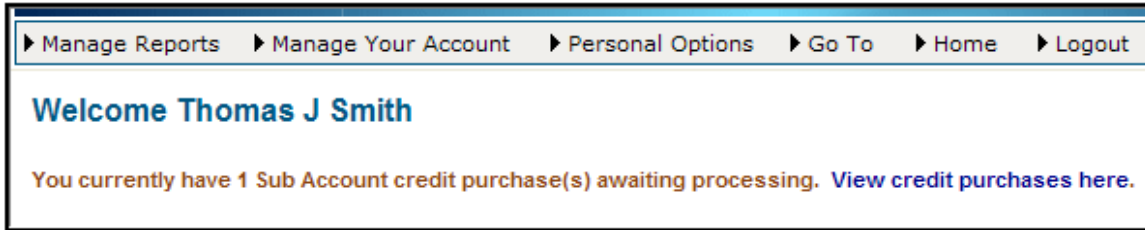
Click on the **View Credit Purchases Here** Link to see all pending requests. You will see a list of all Sub Accounts and the credits that have been removed from your account and added to their account.
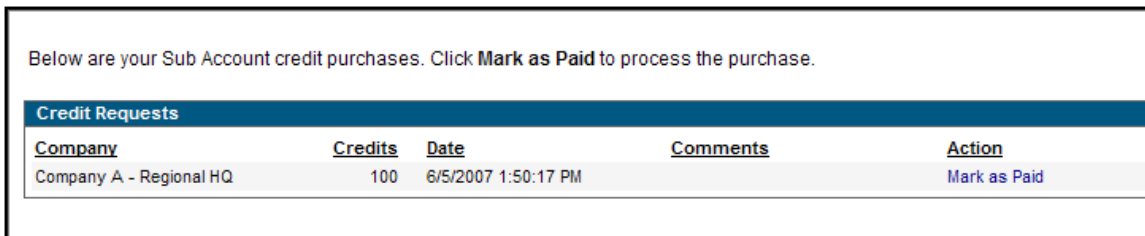
Click the **Mark as Paid** link once you have completed the financial transaction with the Sub Account. Once the Mark as Paid link is clicked, you will restore the full Credit Limit to the Sub Account.

Note: The EPIC system does not facilitate the collection of money from the Sub Account or reclaiming credits should there be difficulty completing the financial transaction with the Sub Account.

Transferring Credits
Menu Location: Manage Your Account>>Sub Accounts>>Manage Individual Sub Accounts

If a Sub Account below you in the account hierarchy needs additional credits in their EPIC account, you can Transfer Credits from your EPIC account to their account using this feature. You can also contact your Inscape Publishing Distributor for assistance in adding credits to your account or other Sub Accounts in your hierarchy. See setting Sub Account Credit Limit for an automated method for providing credits.

The Transfer Credits function does not facilitate any financial activity between accounts. The amount charged for the Credits and the collection of the money needs to occur outside of the EPIC system.

Sub Accounts can also transfer credits to a parent or primary account under Manage your Account >> Transfer Credits to Parent Account . This feature gives the upper level account the ability to buy back unused credits from Sub Accounts or to reverse a transaction between accounts that may have occurred in error.

Sub Accounts can also transfer credits to other Sub Accounts within their account hierarchy. In a multi-level sub account structure, the EPIC system default allows for credits to be transferred between accounts that are one level apart in the structure. (See Multi Level Sub Accounts for information on Sub Account structure.)

If a transfer of credits to an account is not active the function will not be available and it will be indicated as shown below (not an active link) when viewing the Sub Account through the Manage Individual Sub Accounts function.

The Transaction Description field that is displayed during the transfer credit function allows you to enter information relevant to the transfer activity (e.g. P.O. number, Project identifier, etc.) This information will be displayed on your Account Activity Reports and on the Account Activity report for the account receiving the credits. The information is not displayed in the transfer credit email note sent to the Sub Account. The Transaction Description field can be left blank.

Sub Account Credit Transactions Report

Menu Location: Manage Your Account>>Sub Accounts

The Credit Transactions report gives you the ability to review all of the credit purchases and transfers between your account and one or all of your Sub Account(s). The report displays the following information:

- Total credits transferred to accounts
- Total credits received from accounts
- Total credits received from Inscape Customer Service
- Total credits removed by Inscape Customer Service
- Total credits adjusted by Inscape Customer Service

To select multiple Sub Accounts, click the **Show All** link and put check marks by the accounts that you want to include in the report. All accounts can be included in the report by clicking the **Check All** link. If multiple accounts are selected the report will provide a summary by account and then a grand total summary for all accounts selected.

This report can also be generated for individual Sub Accounts by clicking the Sub Account Credit Transactions link in the expanded view for the Sub Account in Manage Individual Sub Accounts.

Profile Completion - Detail and Summary Reports for Sub Accounts

Menu Location: Manage Your Account>>Sub Accounts

The Profile Completion Detail and Summary reports provides you will the ability to review EPIC system activity for one or all of your Sub Accounts. The **Detail report** shows the number of reports (by profile/product) that have been generated during a specific time period and the number of credits that were used. The **Summary report** only shows the number of credits that were used during the time period.

To select multiple Sub Accounts, click the **Show All** link and put check marks by the accounts that you want to include in the report. All accounts can be included in the report by clicking the **Check All** link.

The report will be displayed in a PDF format and can be printed or saved using the features of Adobe Reader.

The Profile Completion detail report can also be generated for individual Sub Accounts by clicking the Profile Completion Report link in the expanded view for the Sub Account in Manage Individual Sub Accounts

Send Sub Account Login Information

Menu Location: Manage Your Account>>Sub Accounts>>Manage Individual Sub Accounts

The Send Login Information page lets you resend login information to a Sub Account administrator who has lost or misplaced the information that they need to access their EPIC Account. Selecting this option will generate an email message to the Sub Account administrator that contains the User ID and Password needed to access the account.

If the Sub Account administrator has lost their password, you can use the Reset Sub Account Password feature to reset their password so it is the same as their User ID.

Sub Account Product List

Menu Location: Manage Your Account>>Sub Accounts

The products/profiles available for your Sub Account's use are displayed using this feature. Click on the View Products link to display the current product listing.

The products available can be modified using the Add/Remove products for Sub Accounts features.

Add/Remove products for Sub Accounts

Menu Location: Manage Your Account>>Sub Accounts

You can Add or Remove profiles for all of your Sub Accounts or for individual Sub Accounts. If you want to work with all of your accounts, use the Add or Remove Products for Multiple Accounts menu items on the Sub Account menu
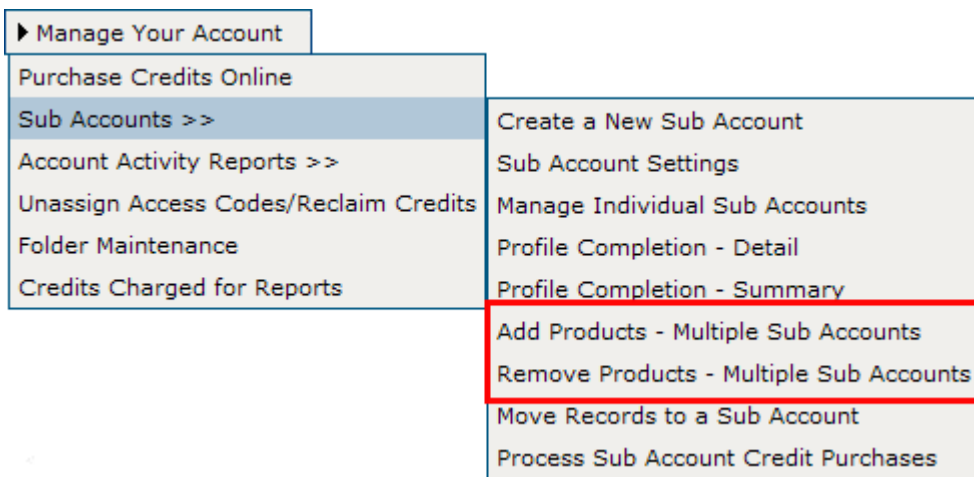
If you want to work with an individual sub account, select Manage Individual Sub Accounts, and select the Add/Remove Products option.
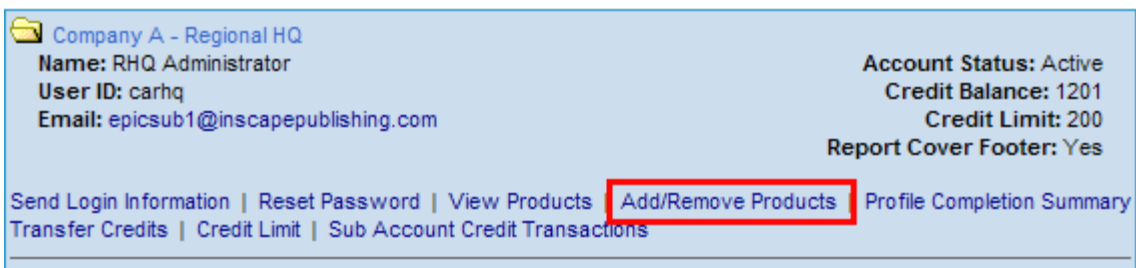
You can then select the product that you want to add or remove from the account.

See Selecting Products to Add/Remove for additional information on adding or removing products from the list.

If you use the **Multiple Accounts** option, **you will not see the profile mix** that your sub accounts currently have in their account because the mix of products may be different for each account and the display would not provide meaningful information.

Notes on Multiple Account functionality: When adding products using the **Multiple Accounts** option, products will be added to **all** of your Sub Accounts at the same time. When a product is added or removed, an Email message will be generated and sent to each of the Sub Account administrators, indicating that their account has been updated.

> In an **Add** situation, if a Sub Account already has a profile, the product will not be added again and email will not be sent.

> In a **Remove** situation, if the account does not have the product, no changes will be made and email will be sent.

A confirmation screen will be displayed following the Add/Remove activity for both multiple account and Individual account changes. If you're updating an individual account, the current mix of products will be displayed. If you're updating multiple accounts, a status of the change will be displayed.   Use the information to verify that the changes you made have been properly applied to your Sub Accounts.

Selecting Products to Add/Remove

The product list that is displayed when adding or removing products is organized by Product Family.
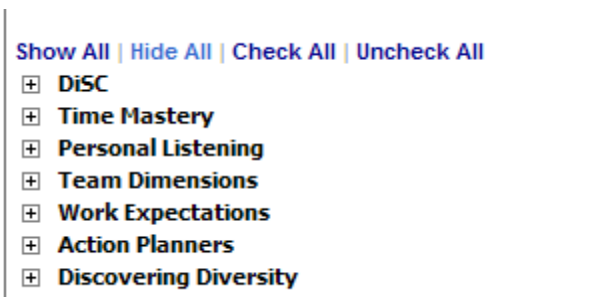
The list can be fully expanded by using the **Show All** link or collapsed using the **Hide All** link. Individual product families can be expanded by clicking on the **+** symbol or collapsed by clicking on the **-** symbol.

Use the **Check All** link to select all products and add all available products to the account. Then click Next at the bottom of the screen to update the account

To remove a large number of products from an account, click the **Uncheck All** link and then individually select the products that will remain in the account. (Note: At least one product must be in each EPIC account.)   Then click Next at the bottom of the screen to complete the update process.

Be sure to click the Next button to save your changes.

Reset Sub Account Password

Menu Location: Manage Your Account>>Sub Accounts>>Manage Individual Sub Accounts

Use the Reset Password option in the Manage Individual Sub Accounts feature to reset a Sub Account's EPIC password. The password is reset to the Sub Account's User ID and an email is sent to the Sub Account administrator with information on regaining access to the EPIC system.

The Sub Account can also request their EPIC account password by clicking on the **Having Trouble Logging In link** that is shown on the EPIC login page. The user can supply either the UserID for the account or the email address for the account to retrieve the information.

Viewing Sub Account Records

Menu Location: Manage Reports

Completed profiles/reports that are created in EPIC Sub Accounts in **your** account hierarchy can be viewed, printed, and used in Group reports **from within your EPIC account**. By **default**, this Sub Account view of records is **not active.** To activate the Sub Account view, you will need to contact your Inscape Publishing Distributor.

A view of records between levels of Sub Accounts within a Sub Account hierarchy can also be established. In the example below, Company A – North Region has requested viewing rights for all Sub Accounts in the North Region hierarchy. When the feature is activated, Company A – North Region would be able to view records in North Region Field Training, North Region Marketing, and North Region Sales. Company A – North Region would not be able to see any records in Company A – South Region.

When the Sub Account view is active, the search criteria screen will display a drop down box showing all Sub Accounts where records can be viewed.
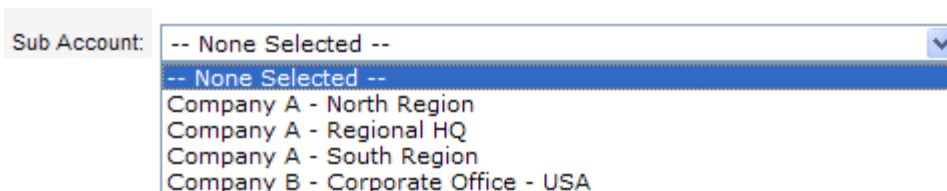
Moving Records to Sub Accounts

Menu Location: Manage Your Account>>Sub Accounts

You can move records from your EPIC account to any EPIC Sub account in your account hierarchy. (See Multi Level Sub Accounts for information on account hierarchy.) The move records feature is a 3 step process.

1. Find the record(s) you would like to move from your account.

    Use the search feature to locate a record or a group of records that you would like to move. The search results screen allows you to select records in two different ways. You can select an individual name by clicking the check box in the left column of the search results screen and then clicking the Next button at the bottom of the screen or you can move all of the records returned by the search by clicking the Select All button at the bottom of the screen.

2. Select the Sub Account where the record(s) will be moved. From your account hierarchy, select the sub account that will receive the records. Use the Show All link to expand your sub account list.
3. Review the record(s) to be moved - make any necessary changes and complete the process. Use the back button to make changes.

Records that you move are stored in a unique folder – sub folder combination. For example, the Thomas J. Smith Consulting company transferred 1 record on 6/6/07 to Company A – Regional Headquarters. Company A will find the transferred record in the following folder location.

The folder name is built using the Company Name field of the sending account and adding it to the phrase: Records Moved from [Company Name]. The sub folder name is the date of the transfer.

You can move records from one of your Sub Accounts to another Sub Account in your hierarchy if you having viewing rights turned on for the 'sending' sub account. You do not need to have viewing rights turned on for the 'receiving' sub account. See Viewing Sub Account Records for more information on viewing rights.

Only completed profiles can be moved. You can not move pending profiles from your account to another account.

Send Email to Sub Accounts

Menu Location: Manage Your Account>>Sub Accounts

This feature lets you send an email message to all or selected sub accounts that are associated with your EPIC account. The controls at the top of the page allow you to display or hide all of your accounts. You can also use the Check all control to quickly select all of the accounts to receive the message.

If you are sending an email note to individual accounts, they need to be selected one at a time.

If you've selected HTML as your email format, (See Email Format) you will have access to the features in the HTML Editor when you are creating your note. If you've selected the plain text format, the HTML editor will not be displayed.

You also have access to your Custom Email Message Library if you want to create a reusable message that can be recalled during this process.

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