



Quick Start Guide

Sub Account
Version

Welcome to EPIC

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

EPIC gives you the power and flexibility to:

- Manage your electronic profile warehouse
- Deliver assessments to clients around the world
- Control when the respondent views the online report
- Personalize the report and the online welcome page with your logo and company information

Log in at <http://admin.inscape-epic.com>





System Overview

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

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

Manage Your Account covers activity related to your use of the system and provides you with information and Management Tools for your Sub Accounts.

The **Personal Options** section is used for viewing and editing your EPIC account information. The Edit Profile page lets you change:

- 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

Basic System Navigation

The 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.

Manage Reports

| |
|--|
| Create a New Report/Issue Access Codes |
| Edit Existing Reports |
| Resend Login Information |
| View/Print/Email Completed Reports |

Create a New Report/Issue Access Codes gives you the ability to create and generate reports for your respondents by issuing an online access code or through tally box score entry.

Edit Existing Records lets you view and edit information such as name and email address for respondents you have in EPIC. You can also

add or change participants in existing group reports, add supplemental reports to an existing profile (if available), and change the storage (folder/sub folder) location where the report is stored.

Resend Login Information lets you resend the login information to a respondent who may have lost or not received the original email note. When you resend login information to a respondent, they will receive a copy of the original login information by email. Resending login information does not incur additional credit charges.

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 to any valid email address.

Manage Your Account

| |
|---|
| Transfer Credits to Parent Account |
| Manage Individual Sub Accounts |
| Account Activity Reports >> |
| Unassign Access Codes/Reclaim Credits |
| Folder Maintenance |
| Credits Charged For Reports |

Transfer Credits to Parent Account allows you to move credits from your account to an account above you in the account structure within EPIC.

The **Sub Accounts** section gives you the ability to manage any Sub Accounts associated with your account. You can send login information, reset their password, transfer credits, view their current product list, and see a summary of reports

completed by your Sub Accounts. You can also add additional products to your Sub Accounts from the list of products currently available in your account.

Account Activity Reports provides you with reports on your usage of the EPIC system. You can:

- View a history of your account activity
- Review product sales with a detailed or summary analysis of the profiles/reports you've generated
- Retrieve a list of all reports for which access codes have been issued but the report has not been completed

Unassign Access Codes/Reclaim Credits returns credits to your account by removing or unassigning access codes from respondents who have not completed a profile that you assigned through EPIC.

Folder Maintenance gives you the ability to manage your storage folders. You can rename, delete, transfer contents and create new Folders and Sub Folders.

Credits Charged for Reports lets you review the credits charged for each of the reports in the EPIC system.

| |
|-------------------------------|
| Personal Options |
| View/Edit Account Information |
| Manage Custom Email Messages |
| Create Sample Reports |
| Change User ID/Password |
| View Privacy Statement |

View/Edit Account Information is used for viewing and editing information about your Administrator account. You can change your company information (e.g. name, address, phone, etc.), upload your company logo, and set defaults for some of the features of the EPIC system.

Manage Custom Email Messages allows creation and storage of custom email messages that can be used when sending out access codes.

Create Sample Reports provides samples of all reports currently in the EPIC system. The reports will be personalized with your contact information and logo and can be viewed, printed, downloaded or sent via email.

Change User ID/Password is used to change the login information for your EPIC account. Both the User ID and Password can be changed. Passwords need to be at least four characters in length and can be any combination of letters, numbers or special characters.

View Privacy Statement provides you with information on Inscape’s policies on storage and security of data gathered in the EPIC system.

Help

With **Online Help**, you can retrieve information about EPIC in three ways:

| | | |
|----------|-------|--------|
| Contents | Index | Search |
|----------|-------|--------|

- Contents: Topics are organized in broad categories to provide you with a basic overview of the system
- Index: A complete listing of all topics in the Help system sorted in alphabetic order by topic heading
- Search: Keyword or phrase search that allows you to search the entire Help system for key words and phrases

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

Some Help topics have additional information available or a link to another topic that might provide more insight. If you see an underlined word or phrase (e.g., [Additional Information](#)), you can click on that link to get additional information about the topic.

Animated tutorials are also available to help you master the key features of EPIC.

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, or by contacting 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.

Personalized Output

DISC Classic 2.0

Sarah Johnson
Tuesday, July 27, 2004

This report is provided by:

Your Company
123 Main Street
Smithville, MN 54321
612-123-9876
www.yourcompany.com

inscape publishing

EPIC generates customized output that displays your logo and company information on the front cover of the report.

The first and last page the respondent sees when completing the online profile is customized with your logo and company information.

DISC Classic 2.0

Your Company
123 Main Street
Smithville, MN 54321
612-123-9876
www.yourcompany.com

powered by
inscape publishing
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NEXT

Establishing additional Sub Accounts

If you are working in a company structure where it would be beneficial to have additional EPIC administrators handling the assignment of access codes, the EPIC system will support the addition of Sub Accounts below your account in a hierarchical structure.

In the example below, Company A has established six additional Sub Accounts and utilizes three of the five Sub Account levels available in the EPIC system.

Company A – Regional HQ

Company A – North Region

Company A – North Region Sales

Company A – North Region Field Training

Company A – North Region Marketing

Company A – South Region

Company A – South Region HR Department

As an upper level Sub Account holder you can:

- Transfer credits to your Sub Accounts
- Review system usage and reports generated by each Sub Account
- Generate Group Reports from **your** EPIC account using records from lower level Sub Account in your account hierarchy. (Note: Approval by the Sub Account is required to activate this feature.)
- Add or remove products/profiles from your Sub Account's EPIC system either individually or as a group

EPIC System Requirements

- PC and Mac compatible
- Internet Access with a Microsoft Internet Explorer 5.0 or higher browser or a Netscape 5.0 or higher browser
- Adobe Acrobat Reader version 4.0 or higher
- Cookies need to be enabled