EPIC Sub Account User Guide

Version 2.51

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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

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

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

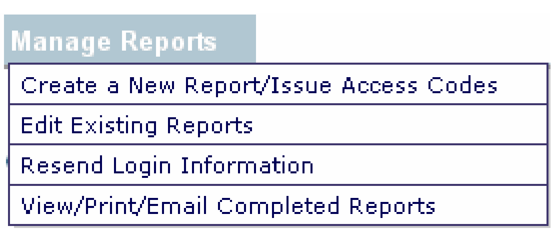
System Overview

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, and edit existing reports in the system. 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 Edit Profile 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

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.

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.

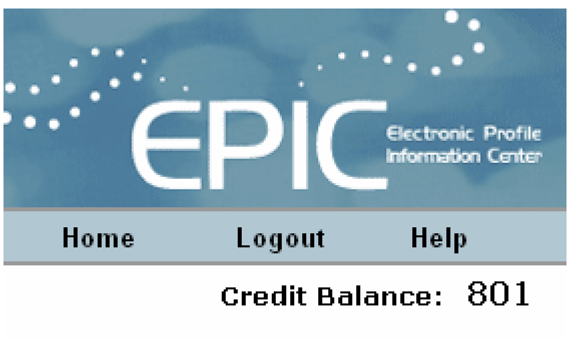
Splash Page: The first page seen by the respondent when they begin taking an online profile. The splash page displays the Contact Information and the Company Logo provided by the administrator.

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.

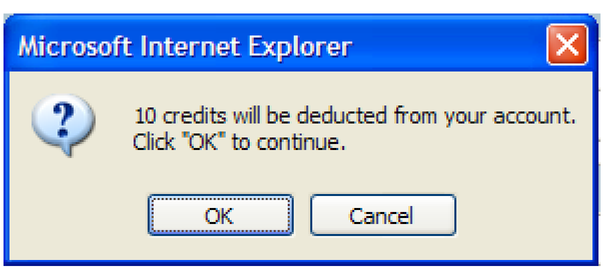
Credits

'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.



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 screen 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 a report setup using the Edit Existing Reports function
- When a dyad and group/comparison 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 page.

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 an account status of one of the following:

- **Active:** An account in good standing.
- **Expired:** An account where your Inscape distributor did not renew his/her membership with Inscape. Any credits that are remaining in the system can still be used but additional credits cannot be added to the account.
- **Locked**: An account that is locked and cannot be used. An account is automatically locked when the user enters the incorrect password three consecutive times.
- **Suspended:** A suspended account cannot be used. If an account has a status of suspended, please contact your Inscape Publishing Distributor.

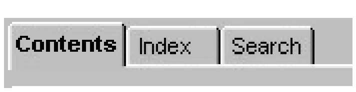
Online Help

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)



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 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 have additional information available or a link to another topic that might provide additional insight. If you see an underlined word/phrase (e.g. Additional Information) 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 tutorial showing key features of EPIC are also available under the Help menu item.

Additional Information

This area would contain additional Help information on the topic. Click on Online Help to go back.

Home

Menu Location: Help

The 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 virtual warehouse.

Messages from your Inscape Publishing Distributor will also be displayed on the home page.

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

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 Adding Supplemental 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 have not received 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 any credit charges. See Resend 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 to someone. See View/Print/Email Completed Reports for more information.

Creating New Reports and Issuing Access Codes

Menu Location: Manage Reports

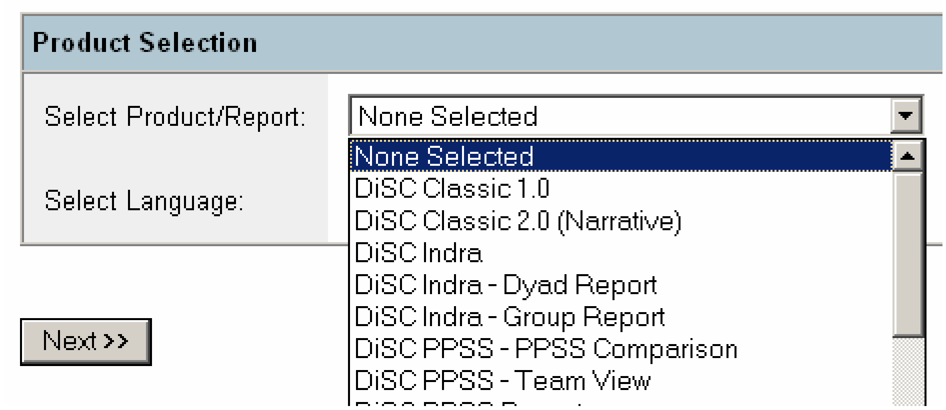
The Create a New Report/Issue Access Code page is the starting point for:

- Selecting the product/profile that you want to use (See Selecting a Product/Report)
- Issuing access codes to respondents so they can take a profile online
- Creating new reports by entering tally box scores (See Tally Box Scores)
- Creating dyad, facilitator, comparison and group reports (Note: Participants for all these reports must have completed an individual profile issued from either your EPIC administrator account or from one of your sub accounts). See Viewing Sub Account Records for more information on using reports created by your sub accounts as participants in a group report.

Selecting a Product/Report

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

The Inscape profiles that are available for you to use online are shown in the Select Product drop down box. To view all of the available products, click the down arrow to the right of the box. To select a product, click on the product name.



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 Select Language box.

Response Style

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

The phrase response option for *DiSC Classic 1.0*, *DiSC Classic 2.0*, *DiSC Classic 2 Plus* and *DiSC PPSS* allows you to bring DiSC learning 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 you assign 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.

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 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 sees a screen informing them that they have completed the profile and the report will be delivered to them by the EPIC administrator.

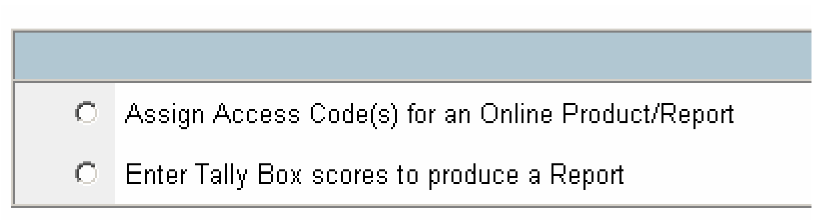
When building dyad and group reports, you can control the online viewing for each individual participant of the report by using the View Online Option.

The viewing option (Yes or No) can be changed for an individual or a member of a group report after the access code has been issued 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 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 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.

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. Display tally box scores) 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 with the following provisions:
- 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 up one of the two edits that EPIC allows)

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. Tally box score 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

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. Locate the record using the Edit Existing Reports function and then select the Create an Additional DiSC Report button at the bottom of the page.

EPIC will use the existing DiSC results to generate the new DiSC report. This feature eliminates the need to enter tally box scores or the need to assign a new access code to the respondent. Credits required for generating the new report will be charged to your account.

Adding Supplemental Reports

Menu Location: Manage Reports>>Edit Existing Reports

Once a report/profile that has supplemental reports available (e.g. DiSC PPSS) 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, 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.

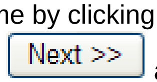
If you want to change your selections, you can make permanent changes using the Edit Existing Reports option. You can also make temporary changes to the print options by selecting what sections of the report to print when using the View/Print/Email Completed Reports feature.

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.

Resending Respondent Login Information

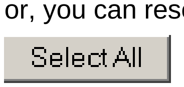
Menu Location: Manage Reports

The Resend Login Information page lets you resend login information to an individual respondent or a group or respondents should they lose or misplace the original 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 send 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 the 

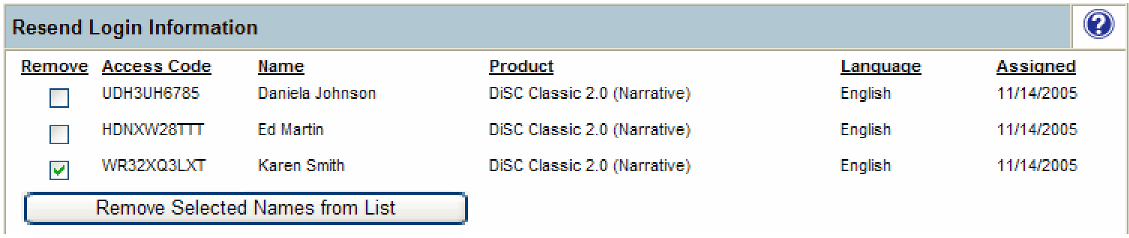
at the bottom of the screen

or, you can resend login information to **all** individuals returned by the search by clicking the



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, click the check box in the left column and click the **Remove Selected Names from List** button.



You also have an option to add Custom Email Messages before resending the login information.

The Resend login information **does not allow any 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, EPIC automatically sends an email note to the respondent with login information.

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 in their EPIC account and use them as participants in a group report.

See Adding Participants to a Group Report

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

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 select an individual participant by clicking the check box in the left column of the search results screen and then clicking the Next >> at the bottom of the screen

Or, you can also add all participants returned by the search to the report by clicking the

button at the bottom of the screen.

Removing or Changing Participants in a Group Report

Menu Location: Manage Reports>>Edit Existing Reports

You can change participants in a completed group/facilitator report 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 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.

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 under the Manage Reports command. 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 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 that is sent by EPIC.

Adobe Reader Version 4.0 or higher needs to be installed on your computer to view and print reports.

View Report in English

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

Note: This feature only applies if you have access to multi-lingual profiles in your 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 was assigned, but also gives the administrator the ability to view the report in English if needed.

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 any additional credit charges. (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)

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.

Transfer Credits to Parent Accounts allows you to move credits from your account to accounts above you in the account hierarchy.

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 - Summary). View Sub accounts for general information on 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 new Sub Accounts were created
    - When credits were purchased – both online and through Inscape Customer Service
    - When credits were transferred to a Sub Account
    - When credits were received from a Sub 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 Folder Maintenance for more information.

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

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 Sub Account – Profile Completion summary 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 new Sub Accounts were created
  - 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 Product sales with a detail or summary analysis of the profiles/reports you've used in the system. View Profile Completion Reports for more information.
- Get a list of all reports that have an access code issued but the report has not yet been completed. View Pending credit reports for more information.
- Review a listing of all of the profiles you've unassigned during a specific time period. See Unassigned Access Code Report.
- View a list of all records that you've moved from your account to one of your Sub Accounts. See link to Records moved report link…..

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:

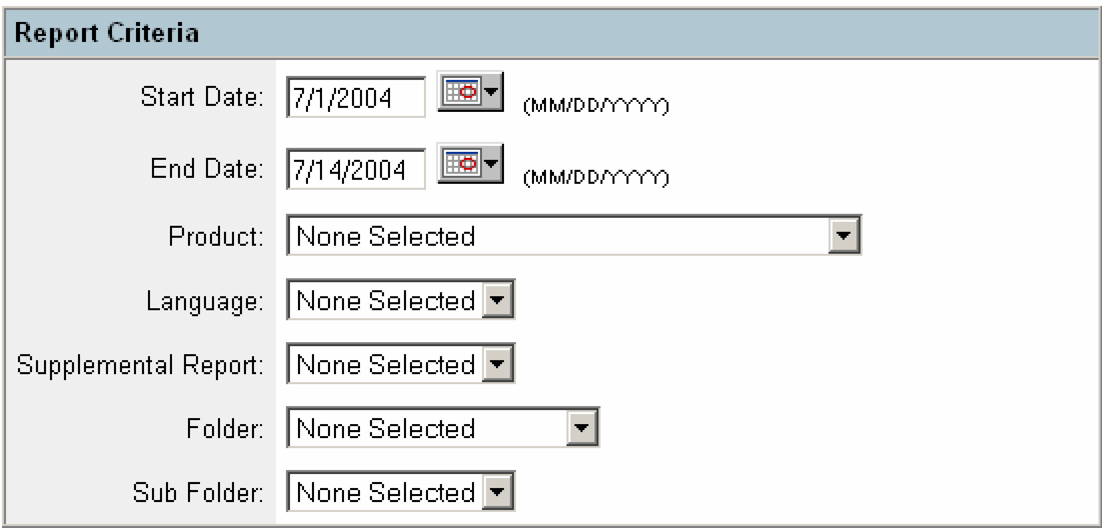
- Number of Sub Accounts that were added to your account
- Number of credits purchased through Inscape Customer Service
- Number of credits transferred **from** your Primary Account **to** a Sub Account
- Number of credits transferred **to** your Primary Account **from** your Sub Account

The report can be converted to a printable format by clicking the Printable Version link of the report output page and then using your Internet Browser print button to send the report to your printer.

Profile Completion Reports

Menu Location: Manage Your Account>>Account Activity Reports

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



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 can be converted to a printable format by clicking the Printable Version link of the report output page and then using your Internet Browser print button to send the report to your printer.

See Manage Individual Sub Accounts for information on generating a Profile Completion – Summary Report 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 all reports where an 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.

This report can be converted to a printable format by clicking the Printable Version link of the report output page and then using your Internet Browser print button to send the report to your printer.

Unassigned Access Code 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.

This report can be converted to a printable format by clicking the Printable Version link of the report output page and then using your Internet Browser print button to send the report to your printer.

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.

This report can be converted to a printable format by clicking the Printable Version link of the report output page and then using your Internet Browser print button to send the report to your printer.

Unassign Access Codes/Reclaim Credits

Menu Location: Manage Your Account

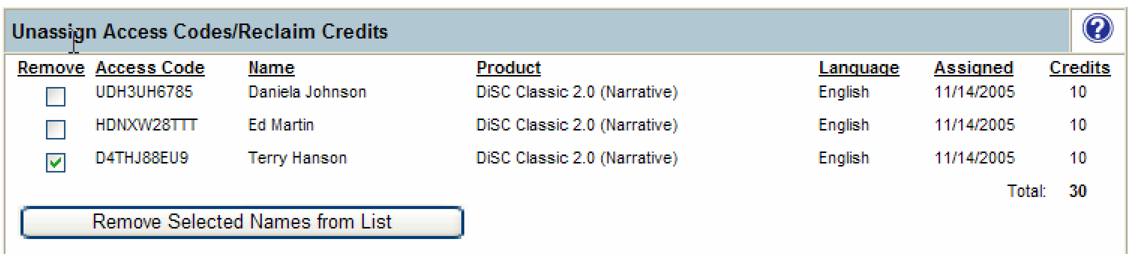
The Unassign Access Codes/Reclaim Credits feature gives you the ability to return credits to your EPIC account for access codes that have been issued and the report has not yet been generated. (Note: This feature does not work for reports that have been completed.) The primary use of this feature is 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 the Next >> at the bottom of the screen

Name: Ed martin	**Access Code:** KP64JWBDFY
Email: emartin@create-a-roadster.com	**Assigned:** 3/24/2005
Product/Report: DiSC Classic 1.0	**Account:** Hudson Training Associates
Language: English	**Folder:** Test
Last Generated:	**Sub Folder:** Classic

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, click the check box in the left column and click the **Remove Selected Names from List** button.

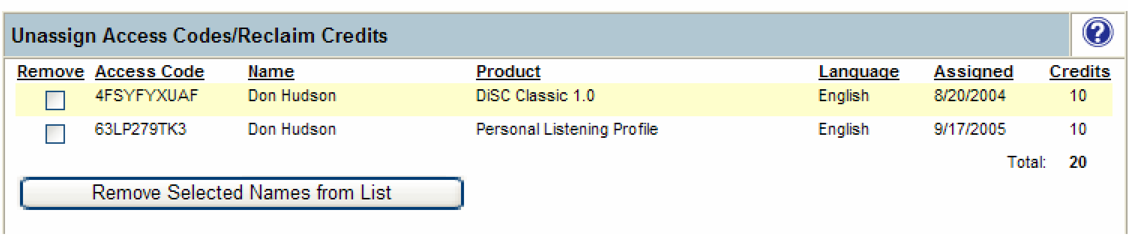


Unassign Access Codes/Reclaim Credits

Remove	Access Code	Name	Product	Language	Assigned	Credits
	UDH3UH6785	Daniela Johnson	DiSC Classic 2.0 (Narrative)	English	11/14/2005	10
	HDNXW28TTT	Ed Martin	DiSC Classic 2.0 (Narrative)	English	11/14/2005	10
✓	D4THJ88EU9	Terry Hanson	DiSC Classic 2.0 (Narrative)	English	11/14/2005	10
					Total:	30

Remove Selected Names from List

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.



Unassign Access Codes/Reclaim Credits

Remove	Access Code	Name	Product	Language	Assigned	Credits
	4FSYFYXUAF	Don Hudson	DiSC Classic 1.0	English	8/20/2004	10
	63LP279TK3	Don Hudson	Personal Listening Profile	English	9/17/2005	10
					Total:	20

Remove Selected Names from List

The confirmation screen provides you with an option to send an email note notifying the respondent that they no longer have access to the profile. You can also add Custom Email Messages to the email that is sent.

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.

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 a specific report in the EPIC system.

The Credits Charged Summary Report can be converted to a printable format by clicking the Printable Version link of the report output page and then using your Internet Browser print button to send the report to your printer.

Maintaining Your Personal Options

Overview of Personal Options

The Personal Options section is used to maintain or change information about your EPIC account. The primary function is: View/Edit Account Information. You can also change your EPIC Password and view the EPIC privacy statement that outlines how the data gathered in EPIC is stored and maintained.

The **View/Edit Account Information** function 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 all of these features click 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 or password for **your** administrator account. Passwords need to be at least four 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, and Email address)
- Contact Information (Five lines of fully customizable text that is 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 that is displayed to a Respondent following completion of an online profile)
- 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)

Important Note: The NEXT button at the bottom of the Personal Options screen needs to 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, name of the administrator, 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 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 codes recipients an easy way to identify email notes sent from EPIC. See Email Messages for additional information.

Important Note: The NEXT 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 on the report covers and the email notes exactly as you type it. Please insure that you enter the information correctly. Each line of text is limited to 50 characters.

Important Notes:

- The EPIC system requires you to supply at least the first line of information.
- **The NEXT 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 upload 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 NEXT 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 no URL is 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.

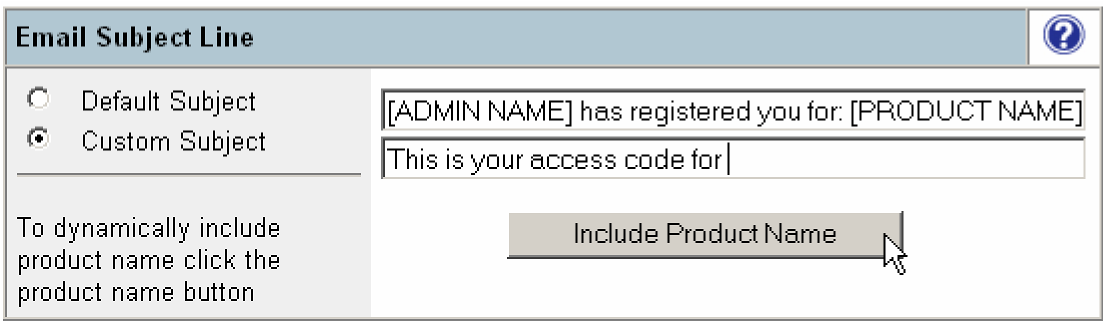
Important Note: The NEXT button at the bottom of the View/Edit Account Information screen needs to be clicked to save any changes you make on this page.

Custom Email subject line

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

You have the capability to create a new **default** Email subject line for assigning access codes.

In the Email Subject Line section, Click the Custom subject button and enter the text that you want to use when assigning access codes. If you want to dynamically include the name of the profile (e.g. DiSC Classic 1.0, Time Mastery) in your custom Email subject line, place your cursor in the Custom Subject box at the point where you want the Product name inserted and click the Include Product Name button. The proper code for dynamically inserting the Product name will be added to the subject line.



Note: Any misspellings, improper structure (removing the brackets around the Product Name), 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 next 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.

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

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 hand 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 NEXT button at the bottom of the View/Edit Account Information screen needs to be clicked to save any changes you make on this page.

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** format supports text formatting, numbering, bullets, alignment, horizontal lines, and linking to Web pages. Most popular e-mail programs use HTML. To utilize the power of HTML email notes, you will need to know basic HTML code to create the special formatting for your note. The HTML code would be included in notes you generate in your Custom Email Message Library . If you are not familiar with HTML, it is the recommended that you leave the email format set to Text.

Completion Notification

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

Completion notification is **Yes/No** indicator (flag) 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.

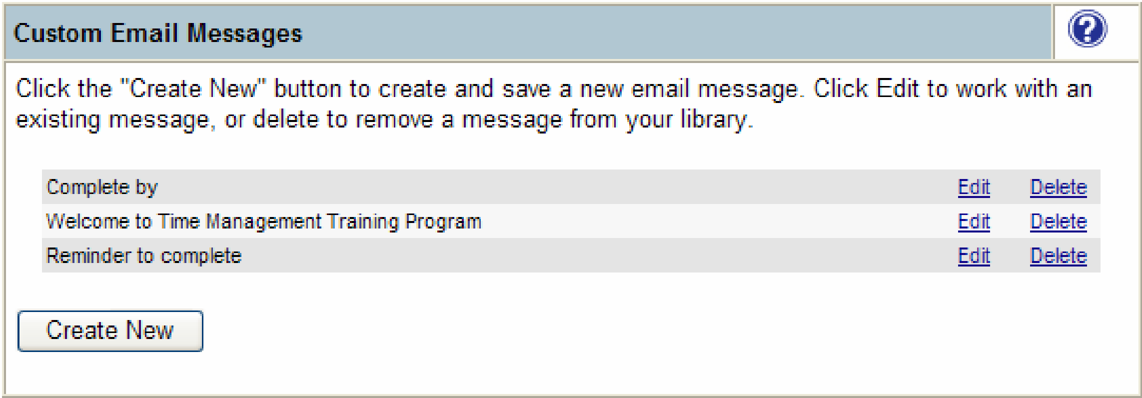
This is a global setting for EPIC and cannot be set for a specific profile or respondent. This means that as long as the flag is set to **Yes,** the administrator will receive notification for all profiles completed by respondents.

Important Note: The NEXT 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.



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.

Note: The custom library does not support bolding, italics, bulleted lists, font size changes, or other special text characteristics.

Create Sample Reports

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 four 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 family name, phone numbers, or birth date.

If you enter your password incorrectly three times in succession when signing onto the system, your EPIC administrator account will be temporarily locked and access will not be allowed. You have two options to regain access to your account:

- You can contact your Inscape Publishing Distributor to have your password reset and account unlocked or
- You can click the Request Password button that appears on the screen after the third failed password attempt. Clicking the Request Password button will send the current password to the email address of the account administrator and unlock the account

Primary accounts or upper level Sub Accounts can reset passwords for all their Subordinate Accounts. See Reset Sub Account Password for more information. Sub Accounts can also take advantage of the Request Password feature outlined above and reset their own account.

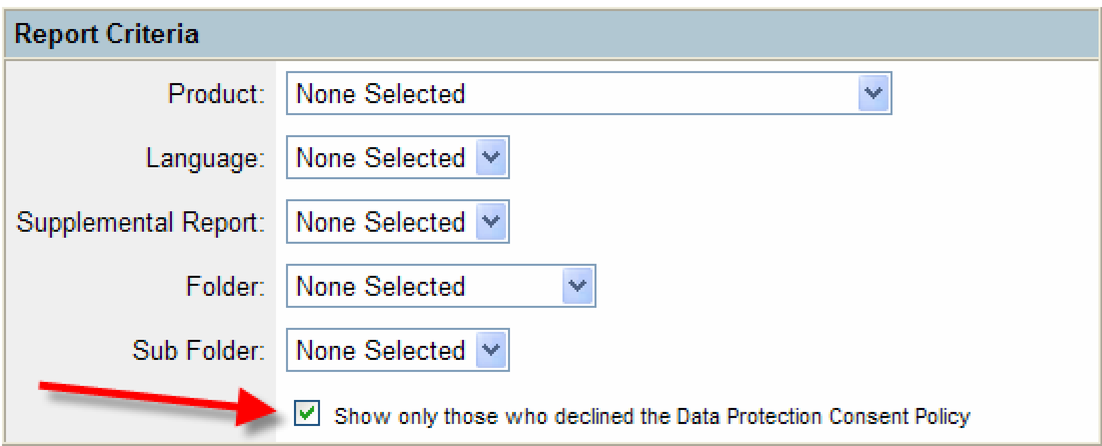
General System Information

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 him or her 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.

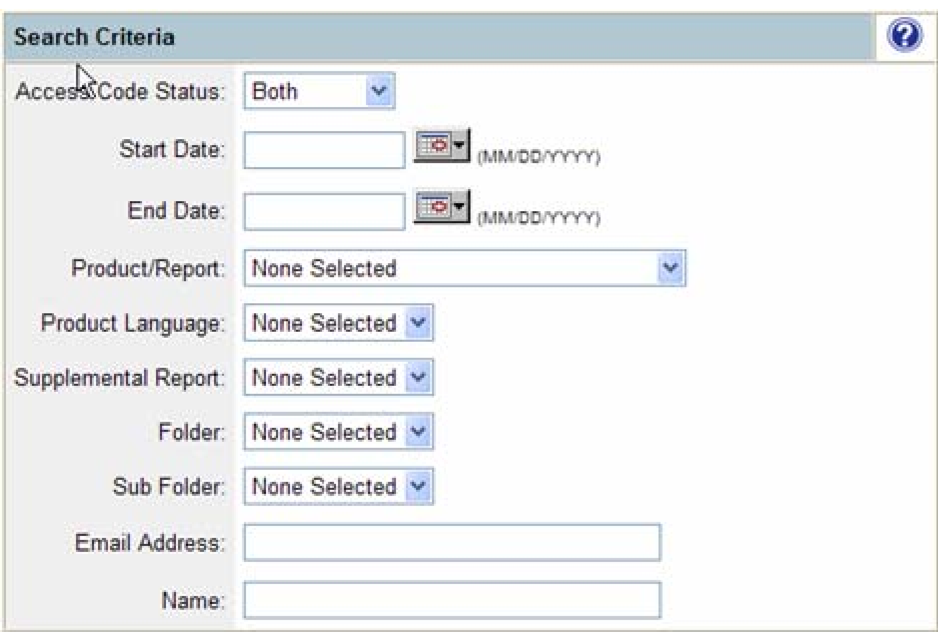
Searching for Records

The EPIC search capability is a very powerful function that allows you to find and retrieve records that you have 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. 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 Fields

Access Code Status: The Access Code Status determines the state of the profile assigned. A profile can be pending or completed. 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.

Product/Report: Searches for respondents who have pending or completed reports for the Inscape Profile you select from the list.

Product Language: Selects the desired language (for example, 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.

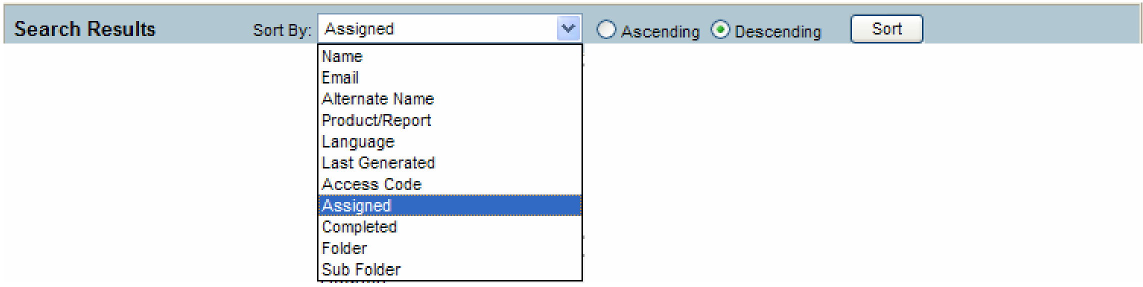
Name: Searches the name field and the alternate name field for a match.

The **View Since Last Log-in** allows you to easily find records that were assigned or completed since the last time you logged into EPIC. This feature is very useful in keeping track of completion status of reports for groups of individuals. This View Since Last Log-in is available anytime you see the search criteria screen. The date and time of your last log-in to EPIC is also shown to help you identify the time period that the search will include.

The **View all** option at the bottom of the page retrieves all records in your system up to a maximum of 500 records. The records are returned in date order based on the date that the access code was assigned or the date that a report was created. If the View All button is selected, search criteria entered in the Search Criteria area above is ignored. The View all search will only return 500 records.

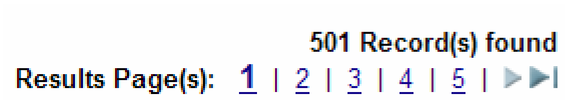
Search Results

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.



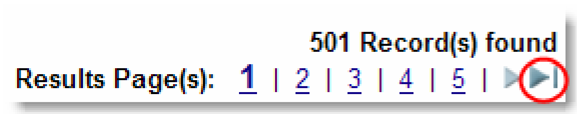
Select your sort criteria and whether you want the list in ascending or descending order. Then click the Sort button.

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 or hit the next arrow to move to the next page.

Click the Last arrow to go to the last page of results



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.

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 inView/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 firewall or 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 issues an access code for the DiSC Classic profile to Jane Olsen out of his EPIC administrator account.

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

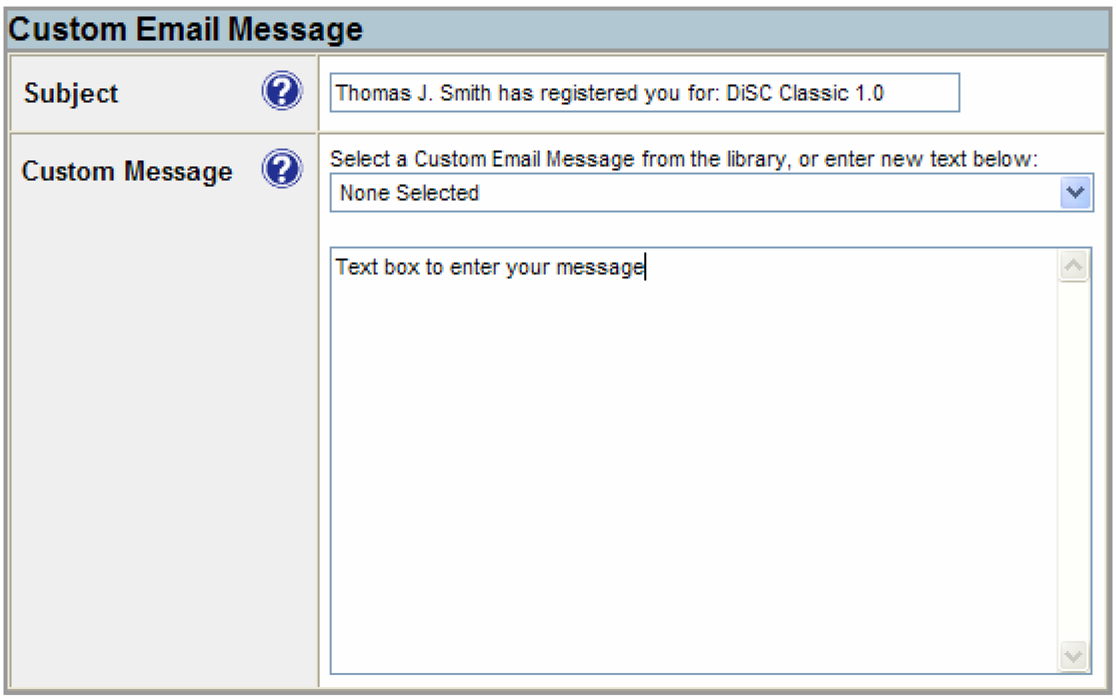
Undeliverable Email

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

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

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.



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

When assigning access codes, the Email Subject line can also be customized. See Custom Email subject line for information.

Custom Email Subject Line - One time change

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

You can override either the System email subject line default or your Custom email subject line default at the time the access codes are assigned, by selecting the '**Click OK to include a custom email message or change the subject line'** option during the assign access codes process. (This option appears after the Credit charge notification is displayed.) The changes made to the email subject line using this process are only applied to the access codes that are currently being sent out. 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 changes, hit the skip button. The system default or your custom default email subject line will be used. The Email subject line cannot be left blank.

Issue Access Codes

See Creating New Reports.

Deleting Records/Reports in EPIC

Respondent records for completed reports cannot be deleted from EPIC. Respondent records for pending reports can be deleted by using the Unassign Access Codes/Reclaim Credits function.

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 before the folder can be deleted.

The **Transfer** command allows you to move records between folders and sub folders. The screen will display a **from** and **to** selection for you to use to choose the sending and receiving folder/sub folder. Records can be moved from a sub folder to a folder level and vice versa. The transfer command moves all of the records in the folder. If you need to change folders for a specific report/record, you would use the Edit Existing Reports function to change the folder assignment.

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

The **Create 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.

NOTE: Respondent records for completed reports cannot be deleted from EPIC. Respondent records for pending reports can be deleted by using the Unassign Access Codes/Reclaim Credits function.

Folder Maintenance

Menu Location: Manage Your Account

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 folders and sub folders to help you organize records for easy retrieval.

You can use the Folder Maintenance function for renaming and deleting folders. You can also transfer content between folders and create new folders and sub folders using this feature. See Working with Folders for additional information.

Working with Sub Accounts

Sub Accounts

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 records for 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 provides you with a list of all Sub Accounts attached to your EPIC account and a set of management options for working with your accounts. The list can be displayed in an Expanded or Collapsed mode.

The Collapsed mode 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.

Collapsed Mode

The Expanded mode shows a detailed view of each account and provides you with options to manage your Sub Accounts.

Expanded Mode

Use the  button to provide detailed information for all Sub Accounts.

Use the  button to return to the list mode.

An individual account can also be expanded or collapsed by clicking on the account name.

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

Send Sub Account Login Information

Reset Sub Account Password

Transferring Credits

Sub Account Product List

Add/Remove products for Sub Accounts

Profile Completion - Summary for Sub Accounts

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

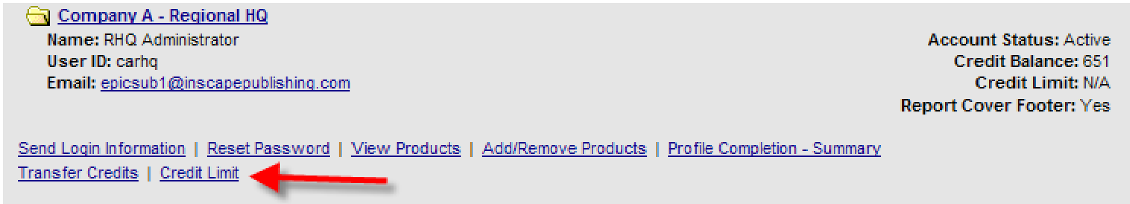
In this example, 50 credits were purchased online and the parent account has not process the order. You are only able to purchase an additional 250 credits through the online purchase function until the order is processed. Once your Inscape Publishing distributor has processed the order, both the Online 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

Sub Account Credit Limit

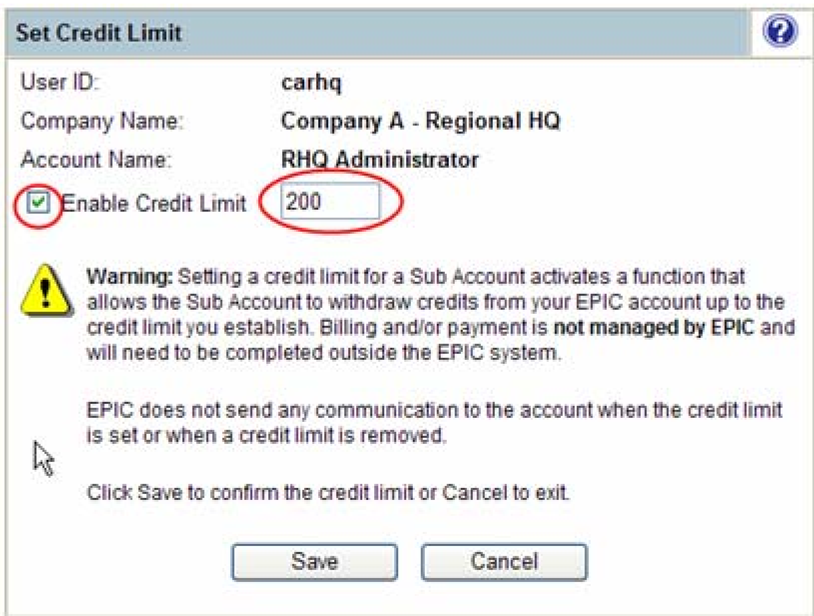
Menu Location: Manage Your Account>>Sub Accounts>>Manage Individual Sub Accounts

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.



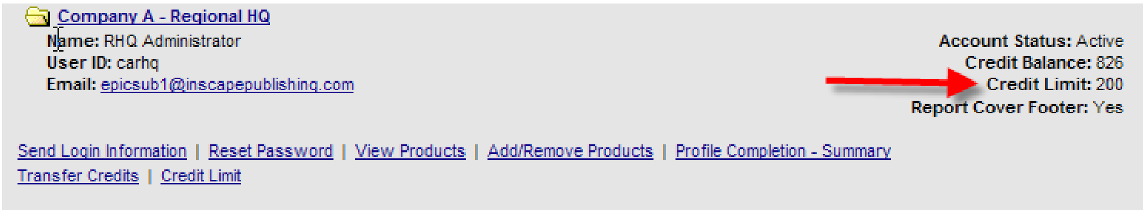
This feature was designed to facilitate an automated request to obtain credits from an upper level account. The EPIC system does not facilitate the collection of money from the Sub Account or give you the ability to reclaim credits should there be difficulty completing the financial transaction with 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.

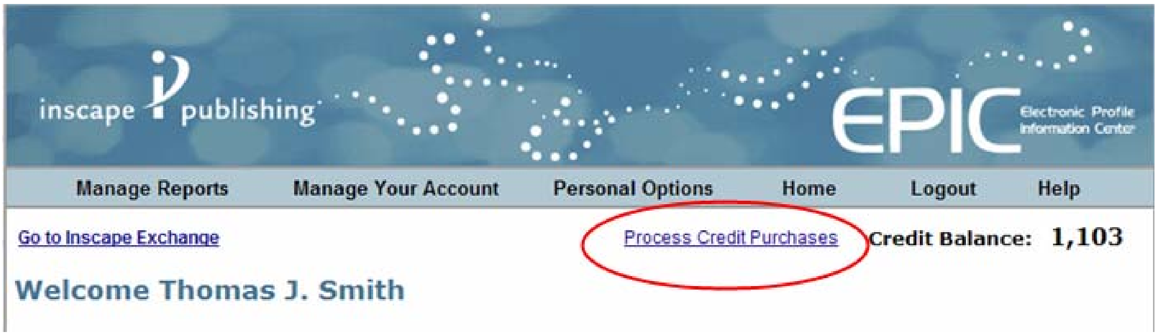
Processing Sub Account Credit Purchases

Menu Location: Home Page

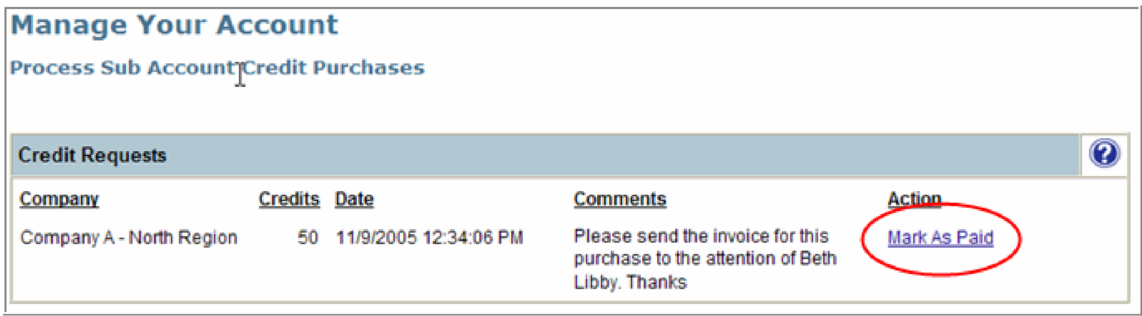
When a Sub Account requests credits from your account through the Purchase Credits from Parent Account feature, they initiate the transaction and are able to immediately add credits to their account. This is different than the Transferring Credits to Sub Account feature where the transaction is initiated 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 from your account, you will receive an email note from the system and an indicator will be shown on your EPIC home page:



Click on the **Process Credit Purchases** 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

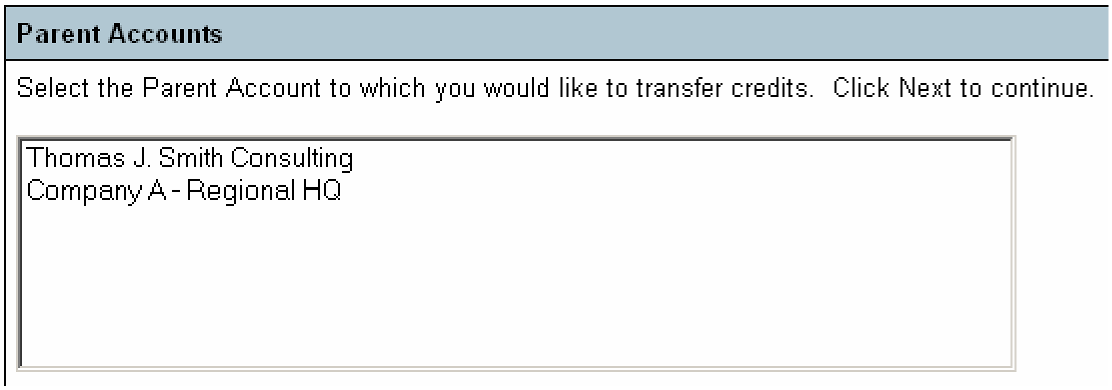
Transferring Credits

Menu Location: Manage Your Account

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 Parent Accounts above them in the hierarch using the Transfer credits to Parent Account feature.



The combination of the Transfer to Parent and the Transfer to Sub Account features provides you with the capability to easily move credits through your Sub 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.) In the example below, **Company A – Regional HQ** can transfer credits to **Company A – North Region** and also to **Company A – South Region**. Transfers to Sub Accounts within North Region or South Region are not allowed in the system default setup. If transfer of credits is required to additional levels in the structure, please contact your Inscape Publishing Distributor for assistance in enabling this feature.

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 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 in your Account Activity Reports and in 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.

Send Sub Account Login Information

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

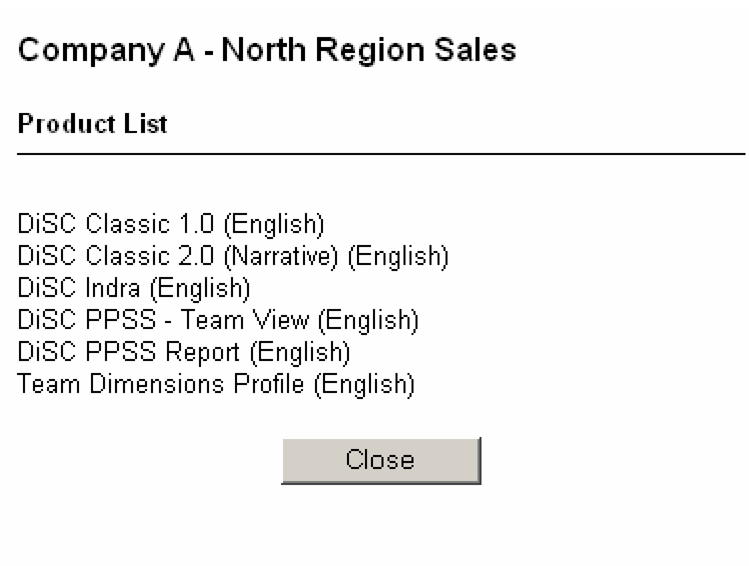
The Send Login Information page lets you resend Sub Account login information to a particular Sub Account administrator who has lost or misplaced the information that they need to access their Sub Account. Selecting this option will generate an email message to the Sub Account administrator that contains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

If the Sub Account administrator has locked their account due to three invalid password entries, you use the Reset Sub Account Password feature to unlock their account and reset their password. The Send Sub Account Login Information feature is not available until the Sub Account is unlocked.

Sub Account Product List

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

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

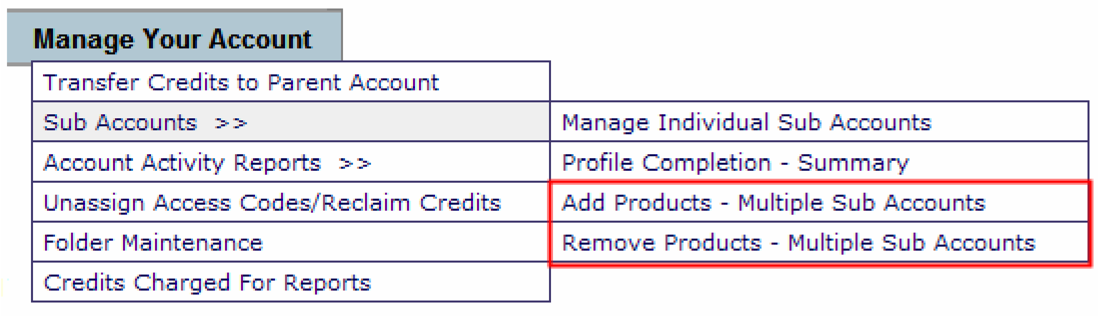


The products available can be modified using the Add/Remove products for Sub Accounts features.

Add/Remove products for Sub Accounts

Menu Location: Manage Your Account>>Sub Accounts

You can Add or Remove profiles for all of you Sub Accounts or for individual Sub Accounts. If you want to work with all of your accounts, use the Multiple Account menu items on the Sub Account menu.



If you want to work with an individual sub account, select Manage Individual Sub Accounts and then 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 using the buttons on the screen to add or remove products from the list.

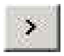
If you use the **Multiple Accounts** option, **you will not see the profile mix** that your sub accounts currently have in their account because the mix of products may be different for each account and the display would not provide meaningful information.

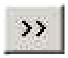
Notes on Multiple Account functionality: When adding products using the **Multiple Accounts** option, products will be added to **all** of your Sub Accounts at the same time. When a product is added or removed, an Email message will be generated and sent to each of the Sub Account administrators, indicating 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 no email will be generated. In a **Remove** situation, if the account does not have the product, no changes will be made and no email will be generated. If **all of your Sub Accounts already have a product**, that product will not be displayed on the screen as a profile that can be added to the Account.

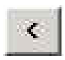
A confirmation screen will be displayed following the Add/Remove activity for both Multiple Account and Individual Account activity. It will display the current mix of profiles after the update. Use it to verify that the changes you made have been properly applied to your Sub Accounts.

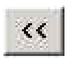
Selecting Products to Add/Remove

To move Products between columns:

 Moves the product you select from the left column to the right column

 Moves all the products from the left column to the right column

 Moves the product you select from the right column to the left column

 Moves all the products from the right column to the left column

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

Profile Completion - Summary for Sub Accounts

Menu Location: Manage Your Account>>Sub Accounts

This Profile Completion – Summary report gives you the ability to review EPIC system activity for one or all of your Sub Account(s). It 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.

To select multiple Sub Accounts from the list, hold down the Ctrl key while clicking the account name.

The report can be converted to a printable format by clicking the Printable Version link of the report output page and then using your Internet Browser print button to send the report to your printer.

This report can also be generated for individual Sub Accounts by clicking the Profile Completion – Summary link in the expanded view for the Sub Account in Manage Individual Sub Accounts

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 EPIC administrator password. The password is reset to the Sub Account administrator'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 use the Request Password button that appears on the screen after the third failed password attempt. Clicking the Request Password button will send the current password to the email address of the account administrator and unlock the account

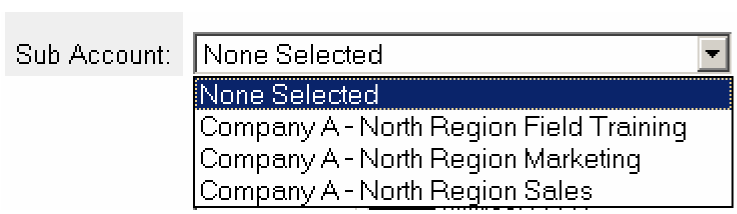
Viewing Sub Account Records

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 function 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. For 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.

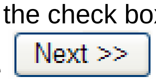


Moving Records to Sub Accounts

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 on the 

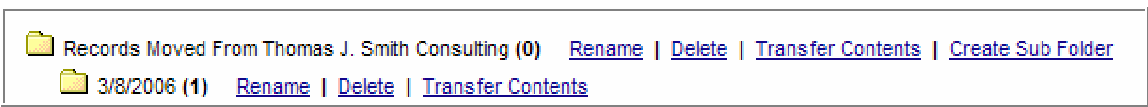
 button at the bottom of the screen

or, you can move all of the records returned by the search by clicking the 

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.
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 3/8/06 to one of their sub accounts. The account that receives the record will find it in the following folder location.



The folder name is built using the Company Name field from EPIC 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.

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