

EPIC Sub Account User Guide

Table of Contents

1. Getting Started	1
Welcome to Epic.....	1
System Overview.....	1
Glossary of Terms.....	3
Credits.....	4
Account Status.....	6
Online Help.....	6
Additional Information.....	7
Home.....	7
Technical Support.....	8
2. Creating and Managing Reports	9
Overview of Manage Reports.....	9
Creating New Reports and Issuing Access Codes.....	10
Selecting a Product/Report.....	10
Response Style.....	11
Controlling Online Report Viewing.....	12
Tally Box Scores.....	12
Edit Existing Reports.....	13
Adding Supplemental Reports.....	15
Change Report Content.....	15
Resending Respondent Login Information.....	16
Creating a Group Report.....	16
Adding Participants to a Group Report.....	17
View/Print/Email Completed Reports.....	17
Regenerating Reports.....	18
3. Managing Your Account	21
Overview of Manage Your Account.....	21
Transferring Credits.....	22
Reports.....	24
Account Activity Reports.....	24
Account History Report.....	25
Product Sales Reports.....	26
Pending Credits Report.....	27
Unassign Access Codes/Reclaim Credits.....	28
Credits Charged for Reports.....	29
4. Maintaining Your Personal Options	31
Overview of Personal Options.....	31
View/Edit Account Information.....	31
Company Information.....	32
Contact Information.....	33
Company Logo.....	34
Uploading your Logo.....	34
Company URL.....	35
Custom Email subject line.....	35
Credit Reminder.....	36
Completion Notification.....	37
Changing Your User ID/Password.....	37
Password.....	38

5. General System Information	41
Data Protection Consent Form	41
Data Protection Policy	41
Searching for Records	44
Alternate Name	47
Email Messages	47
Custom Email Messages	48
Custom Email Subject Line - One time change	49
Issue Access Codes	49
Deleting Records/Reports in EPIC	49
Using Folders to Organize your Data	50
Working with Folders	50
Folder Maintenance	52
6. Working with Sub Accounts	53
Sub Accounts.....	53
Multi Level Sub Accounts	53
Manage Individual Sub Accounts	54
Send Sub Account Login Information	56
Sub Account Product List	56
Add/Remove products for Sub Accounts	57
Selecting Products to Add/Remove	58
Sub Account Sales Summary	59
Reset Sub Account Password	59
Viewing Sub Account Records	60
7. Sample Reports	63
Create Sample Reports	63
Sample Reports	63
8. Index	65

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.

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

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.

Click on Overview of Manage Reports for more information.

Manage Your Account

The Manage Your Account section covers activity related to your use of the system, provides you with information about Sub Accounts and gives you the capability to purchase credits online from Inscape.

Click on 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

Click on 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.



Credit Balance: 801

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.

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 when access codes are issued, supplemental reports are added to a report setup using the Edit Existing Reports function and during the initial report generation for dyad and group/comparison reports. 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 the 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.

Additional Information

This area would contain additional Help information on the topic. Click 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 through tally box scores (not available for all reports) or by issuing an online access code. Click on 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 to an existing profile (if available), 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. Click on 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. Click on View/Print/Email Completed Reports for more information.

Creating New Reports and Issuing Access Codes

Menu Location: Manage Reports

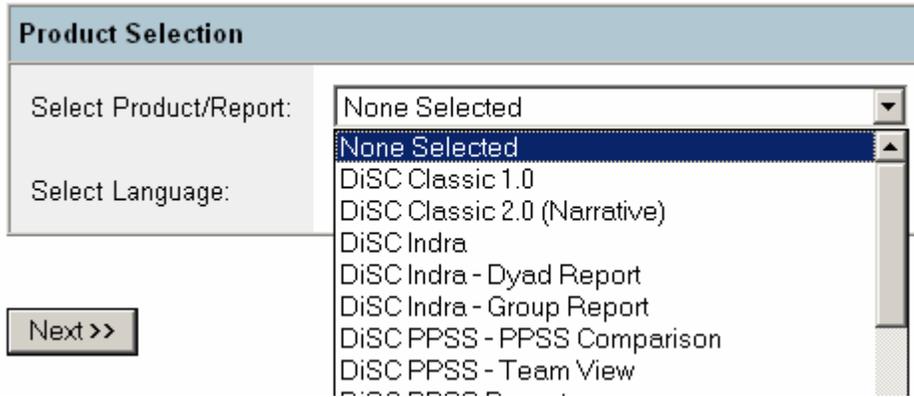
The Create a New Report/Issue Access Code page is the starting point for:

- Selecting the product/profile that you want to use (See Selecting a Product/Report)
- Creating new reports by entering tally box scores (See Tally Box Scores)
- Issuing access codes to respondents so they can take a profile online
- Selecting participants for dyad or comparison/group reports (Note: Participants for all dyad or comparison 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*, 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*, 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*, 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.

The image shows a screenshot of a web interface with a light blue header bar. Below the header, there is a white rectangular area containing two radio button options. The first option is 'Assign Access Code(s) for an Online Product/Report' and the second option is 'Enter Tally Box scores to produce a Report'. Both radio buttons are currently unselected.

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
- The folder or sub folder the records is stored in
- Whether the report can be viewed online
- Add supplemental reports to profiles (when available) See Adding Supplemental Reports for more information.

Tally box scores for completed DiSC family products can be displayed by clicking the Display Tally Box Scores button on Edit Individual Report screen.

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:
 - 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)
- Change the online view for individual participants in a group report
- Add additional report recipients
- Change the storage folder or sub folder

Important notes:

- Each individual respondent record or group report for **completed** reports can be edited twice. The third attempt to edit the respondent record is blocked by EPIC.
- **Pending** report records do not have an edit restriction.
- Adding Supplemental Reports does not count as an edit of the Respondent Record.
- 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.
- 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.

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, (i.e. 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 a respondent 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 sent when you initially assigned the access code.

Resending login information does not incur additional credit charges.

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 add an individual participant by placing a check mark by their name.

	Email: dhudson@inscapepublishing.com	Assigned: 1/29/2003
	Name: Donald D hudson	Completed: 1/29/2003
	Alternate Name: Donald Hudson	Language: English
	Product/Report: DiSC Indra	Folder: Inscape Publishing
	Account: Hudson Training Associates	Sub Folder: Exec

Or, you can also add all participants returned by the search to the report by clicking the  button at the bottom of the screen.

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.

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

Managing Your Account

Overview of Manage Your Account

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

- 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

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 (Sales Summary). See Manage Individual Sub Accounts for additional information.

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 – through Inscape Customer Service
 - When credits were transferred to a Sub Account
 - When credits were received from a Sub Account
- Review Product sales with a detailed or summary analysis of the profiles/reports you've created in your EPIC system. View Product Sales 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.

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.

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.

Parent Accounts

Select the Parent Account to which you would like to transfer credits. Click Next to continue.

Thomas J. Smith Consulting
Company A - Regional HQ

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.

 Company A - South Region HR Department		Account Status: Active
Name: A - South Region HR Department		Credit Balance: 125
User ID: cashrd		Report Cover Footer: No
Email: epicsub3@inscapepublishing.com		
Send Login Information Reset Password Transfer Credits View Products Add/Remove Products Sales Summary		

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 - Sales Summary report that will display the number of reports generated by your Sub Account(s). For more information click on 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 Product Sales 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.

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.

Product Sales Reports

Menu Location: Manage Your Account>>Account Activity Reports

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

Report Criteria	
Start Date:	<input type="text" value="7/1/2004"/>  (MM/DD/YYYY)
End Date:	<input type="text" value="7/14/2004"/>  (MM/DD/YYYY)
Product:	<input type="text" value="None Selected"/>
Language:	<input type="text" value="None Selected"/>
Supplemental Report:	<input type="text" value="None Selected"/>
Folder:	<input type="text" value="None Selected"/>
Sub Folder:	<input type="text" value="None Selected"/>

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 **Product Sales - 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 Product Sales – 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.

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.

When an access code is reclaimed, an email note is sent to the respondent informing them that they no longer have access to the profile. Your credit balance on the EPIC system will be incremented based on the number of credits associated with the report that was unassigned.

An access code can also be unassigned if a respondent starts the profile but never progresses far enough to produce an output report. When unassigning these 'in progress' codes, you will be told that the respondent has started the profile. You can still choose to unassign the code and reclaim the credits by clicking OK in the confirmation box.

Access codes can only be reclaimed one respondent at a time. There is no 'batch or bulk' unassign option.

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.

The administrator uses the **Change User ID/Password** function to change the User ID or password for **their** administrator account. Passwords need to be at least four characters in length and can be any combination of letters, numbers or special characters.

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 the EPIC Account administrator:

- 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)
- 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, and email address for the administrator account.

You can change the Company Name, the Administrator Name and Email fields.

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.

If you need to change your EPIC User ID, you will need to contact your Inscape Publishing Distributor.

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 (;).

Contact Information

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

The information the administrator provides 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.

Note: The EPIC system requires the administrator to supply at least the first line of information.

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.

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.

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

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 Credit Reminder threshold 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.

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.

Changing 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.

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.

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.

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.

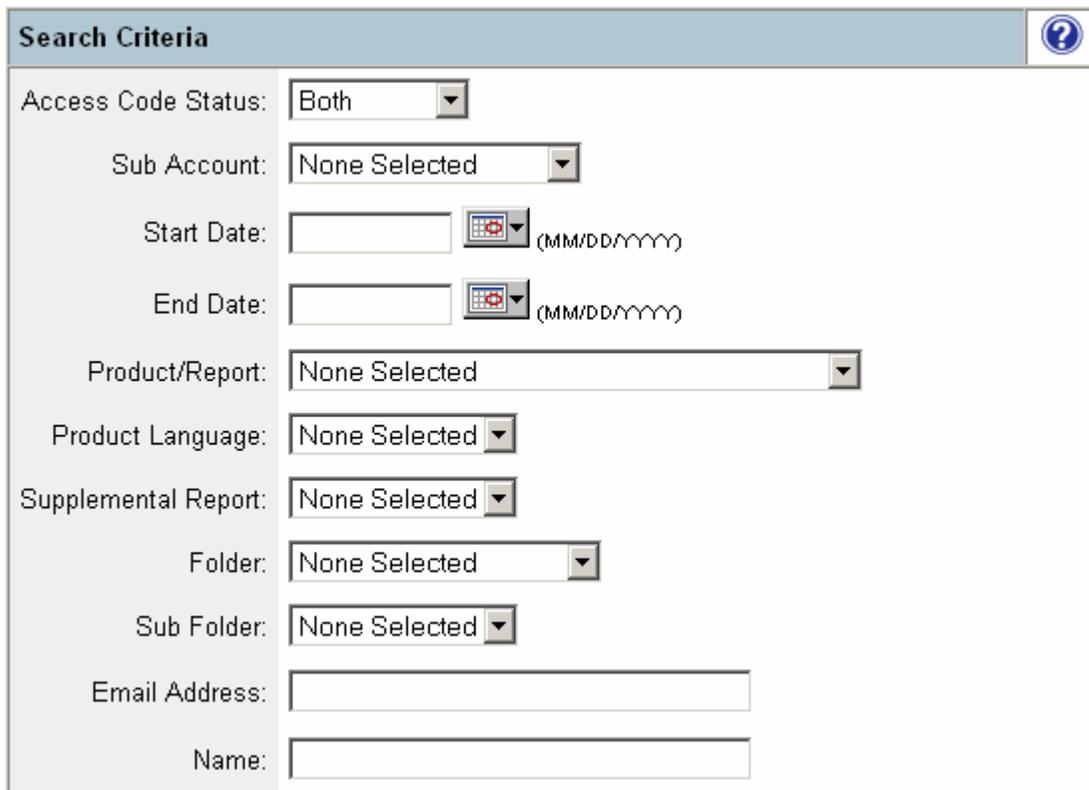
Searching for Records

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 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. If the View all search returns more than 500 records, you will be prompted to refine your search criteria to find your record.

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 than 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. To view the content of the email notes and the description of the event that triggers the note, click on the following link:

Sample EPIC Email

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

EPIC has a standard subject line that is generated when assigning access codes. This system default combines the information in the Administrator name field with the Product that is being assigned.

For example, let's assume that Thomas J. Smith is the EPIC Administrator and he issues an access code for the DiSC Classic profile to Jayne Olsenth out of his EPIC administrator account. The address information on the note would look like the example below:

From: Online Access Code
To: Jayne Olsenth
Subject: Thomas J. Smith has registered you for DiSC Classic

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

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 are not retained in the system.

When assigning access codes through the Creating New Reports feature, the custom email message that you enter is sent to all respondents that are entered on the Assign Access Codes screen.

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.

- North - Information Technology Dept (9) [Rename](#) | [Delete](#) | [Transfer Contents](#) | [Create Sub Folder](#)
 - Programming (14) [Rename](#) | [Delete](#) | [Transfer Contents](#)
 - Network Support (15) [Rename](#) | [Delete](#) | [Transfer Contents](#)
 - Executive (9) [Rename](#) | [Delete](#) | [Transfer Contents](#)
- North - Product Development (37) [Rename](#) | [Delete](#) | [Transfer Contents](#) | [Create Sub Folder](#)
 - Publishing (16) [Rename](#) | [Delete](#) | [Transfer Contents](#)
 - Media Management (6) [Rename](#) | [Delete](#) | [Transfer Contents](#)
 - Production/Graphics (15) [Rename](#) | [Delete](#) | [Transfer Contents](#)

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 that apply to interaction between Sub Account levels:

Transferring Credits allows for bidirectional movement of credits between Sub Accounts.

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

Upper level Sub Accounts or Sub Accounts that have additional Sub Accounts beneath them in the hierarchy can utilize these multi-level features: Transferring Credits and Viewing Sub Account Records.

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 primary 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.

Click on 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
- Sub Account Sales Summary

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.

Company A - North Region Sales

Product List

DiSC Classic 1.0 (English)
DiSC Classic 2.0 (Narrative) (English)
DiSC Indra (English)
DiSC PPSS - Team View (English)
DiSC PPSS Report (English)
Team Dimensions Profile (English)

Close

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

This function is available in the Manage Your Account > Sub Accounts section.

Manage Your Account	
Purchase Credits Online	
Sub Accounts >>	Manage Individual Sub Accounts
Account Activity Reports >>	Add Products - Multiple Sub Accounts
Unassign Access Codes/Reclaim Credits	Remove Products - Multiple Sub Accounts
Folder Maintenance	
Credits Charged For Reports	

You will see the profiles currently assigned to that specific Sub Account when you select the Add/Remove Product option.

 **Company A - Regional HQ**

Name: A - Regional HQ
User ID: carhq
Email: epicsub1@inscapepublishing.com

Account Status: Active
Credit Balance: 90
Report Cover Footer: Yes

[Send Login Information](#) | [Reset Password](#) | [Transfer Credits](#) | [View Products](#) | [Add/Remove Products](#) | [Sales Summary](#)

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.

A confirmation screen will be displayed following the Add/Remove 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.

Profiles currently assigned to a specific Sub Account can be reviewed in the Manage Your Account > Sub Accounts section.

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.

Sub Account Sales Summary

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

This report gives you the ability to review EPIC system activity for your Sub Account(s). The Product Sales – Summary report for your Sub Account shows the number of reports (by profile/product) that have been generated during a specific time period and the number of credits that were used.

The 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.

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 call Inscope Customer service or Technical Support and provide documentation of approval between the accounts where the view will be allowed.

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.

Sub Account: 

- None Selected
- Company A - North Region Field Training
- Company A - North Region Marketing
- Company A - North Region Sales

Sample Reports

Create Sample Reports

You can create generic Sample Reports with EPIC. Click on the underlined link for additional information on this option.

Sample Reports

Generic (non personalized) samples of the reports currently in the EPIC system can be viewed by clicking on the appropriate link below. These samples can be used as a method for you to become familiar with the content of the various profile reports offered by Inscape. These sample reports are not customized with your company logo or contact information.

- [DiSC Classic 1.0 Sample Report](#)**
- [DiSC Classic 2.0 \(Narrative\) Sample Report](#)**
- [DiSC Facilitator Report Sample Report](#)**
- [DiSC Group Culture Report Sample Report](#)**
- [DiSC PPSS – General Characteristics Sample Report](#)**
- [DiSC PPSS – Role Behavioral Analysis \(RBA\) Sample Report](#)**
- [DiSC PPSS – RBA to RBA Comparison Sample Report](#)**
- [DiSC PPSS – PPS to RBA Comparison \(Single\) Sample Report](#)**
- [DiSC PPSS – PPS to RBA Comparison \(Multiple\) Sample Report](#)**
- [DiSC PPSS – PPS to PPS Comparison Sample Report](#)**
- [DiSC Team View Sample Report](#)**
- [DiSC Sales Action Planner Sample Report](#)**
- [DiSC Customer Service Action Planner Sample Report](#)**
- [DiSC Management Action Planner Sample Report](#)**
- [DiSC Managing Performance Action Planner Sample Report](#)**
- [DiSC Indra Sample Report](#)**
- [DiSC Indra – Dyad Report Sample Report](#)**
- [DiSC Indra – Small Group Report Sample Report](#)**
- [DiSC Indra – Large Group Report Sample Report](#)**
- [Team Dimensions Profile Sample Report](#)**
- [Team Dimensions 2.0 Profile Sample Report](#)**
- [Time Mastery Profile Sample Report](#)**
- [Time Mastery Facilitator Report Sample Report](#)**
- [Discovering Diversity Profile Sample Report](#)**
- [Discovering Diversity – Group Report Sample Report](#)**
- [Work Expectations Profile Sample Report](#)**
- [Work Expectations Profile – Group Report Sample Report](#)**
- [Personal Listening Profile Sample Report](#)**
- [Personal Listening Profile – Facilitator Report Sample Report](#)**

Index

A		G	
<i>Account Activity Reports</i>	15	<i>Glossary of Terms</i>	2
<i>Account History Report</i>	15	H	
<i>Account Status</i>	3	<i>Home</i>	4
<i>Activity Reports</i>	15	I	
<i>Add/Remove products for Sub Accounts</i>	35	<i>Issue Access Codes</i>	7, 29
<i>Adding Participants to a Group Report</i>	11	M	
<i>Adding Supplemental Reports</i>	10	<i>Manage Individual Sub Accounts</i>	33
<i>Alternate Name</i>	28	<i>Manage Reports</i>	7
B		<i>Manage Your Account</i>	13
<i>Basic System Navigation</i>	1	<i>Moving Products between columns</i>	36
C		<i>Multi Level Sub Accounts</i>	33
<i>Change Report Content</i>	10	O	
<i>Changing Group Report Participants</i>	9	<i>Online Help</i>	4
<i>Changing Your Password</i>	22	<i>Organizaing your records with folders</i>	30
<i>Changing Your User ID</i>	22	<i>Overview of Manage Reports</i>	7
<i>Company Information</i>	19	<i>Overview of Manage Your Account</i>	13
<i>Company Logo</i>	20	<i>Overview of personal options</i>	19
<i>Company URL</i>	19, 21	P	
<i>Completion Notification</i>	22	<i>Password</i>	23
<i>Contact Information</i>	20	<i>Pending Credits Report</i>	17
<i>Controlling Online Report Viewing</i>	8	<i>Printing Reports</i>	11
<i>Create Sample Reports</i>	39	<i>Printing Selected Sections of a Report</i>	10
<i>Creating a Group Report</i>	11	<i>Product Sales Reports</i>	16
<i>Creating Folders</i>	30	R	
<i>Creating New Reports</i>	7	<i>Regenerating Reports</i>	12
<i>Creating Sub Folders</i>	30	<i>Renaming Folders</i>	30
<i>Credit Reminder</i>	19, 22	<i>Reports</i>	15
<i>Credits</i>	3	<i>Resend Login Information</i>	11
<i>Credits Charged for Reports</i>	18	<i>Reset Sub Account Password</i>	37
<i>Custom Email Messages</i>	29	<i>Response Style</i>	8
<i>Custom Email subject line</i>	21	S	
<i>Custom Email Subject Line - One time change</i>	29	<i>Sales Summary for Sub Accounts</i>	36
D		<i>Sample Reports</i>	39
<i>Data Privacy</i>	25	<i>Searching for Records</i>	26
<i>Data Protection Consent Form</i>	25	<i>Select All</i>	11
<i>Data Protection Policy</i>	25	<i>Selecting a Product/Report</i>	7
<i>Deleting Folders</i>	30	<i>Selecting Products to Add/Remove</i>	36
<i>Deleting Records/Reports in EPIC</i>	29	<i>Send Sub Account Login Information</i>	34
E		<i>Start Here</i>	2
<i>Edit Existing Reports</i>	9	<i>Sub Account Product List</i>	35
<i>Email Messages</i>	28	<i>Sub Account Sales Summary</i>	36
F		<i>Sub Accounts</i>	33
<i>Folder Maintenance</i>	31	<i>System Overview</i>	1
<i>Folders and Sub Folders</i>	30	T	

<i>Tally Box Scores</i>	7, 8	V	
<i>Technical Support</i>	5	<i>View All</i>	26
<i>Transferring Credits</i>	14	<i>View Online</i>	8
<i>Transferring Folder Contents</i>	30	<i>View Sub Account Products</i>	35
U		<i>View/Edit Account Information</i>	19
<i>Unassign Access Codes/Reclaim Credits</i>	17	<i>View/Print/Email Completed Reports</i>	11
<i>Uploading your Logo</i>	21	<i>Viewing Sub Account Records</i>	37
<i>User ID</i>	22	W	
<i>Using Folders to Organize your Data</i>	30	<i>Welcome to Epic</i>	1
<i>Using Sub Account records in Group Reports</i>	37	<i>Working with Folders</i>	30