EPIC
Electronic Profile Information Center

Quick Start Guide

for Sub Accounts

Welcome to EPIC
Electronic Profile Information Center

EPIC is a secure website that gives you a stress-free
way to manage your Inscape assessments.

Log in at admin.inscape-epic.com.

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EPIC: Overview

EPIC is a secure website that gives you a stress-free way to manage your Inscape assessments. From customizable features to a growing list of functions, EPIC-based profiles offer advantages even Inscape's paper instruments can't match.

Increased Productivity
Using EPIC helps conserve valuable training time. Employees complete assessments online before training sessions, so you can use every minute of classroom time to its full advantage. Plus, EPIC takes care of scoring participant profiles behind the scenes, saving time and increasing accuracy.

Enhanced Administrative Access
As an EPIC account administrator, you control access to the profiles in your EPIC account. Since it's all online, you can access EPIC at any time—issue access codes, monitor report completion, and print reports from anywhere in the world. Once a person completes an assessment, EPIC scores and generates their personalized profile right away. People can view their profile immediately after they complete an assessment, or you can hand them out later at your training session.

Refined Report Options
Make training stick with exclusive EPIC follow-up reports! You can build group reports from participant profiles in your EPIC account and easily move people in and out of group reports as teams change.

Customizable Features
And, you can tailor Everything DiSC® profiles to meet your training timeframe. Profile sections can be rearranged or even removed to fit your needs. You can even personalize Everything DiSC reports with your company name, training program, and logo.

EPIC Functions: High-Level Overview

EPIC is divided into four main functions: Manage Reports, Manage Your Account, Personal Options, and Help. Here's an overview of what you can do with these four functions.

Go to Manage Reports to:
- Email access codes to participants for EPIC profiles
- Send reminders to participants who haven't completed their profiles
- Create group reports
- Edit or delete profiles
- Print, email, or save completed profiles
- Work with a group of reports at once (versus one report at a time)

Go to Manage Your Account to:
- View reports about your EPIC account usage
- Use folders to organize and manage all profiles in your account

Go to Personal Options to:
- Set or change your EPIC account information
- Create free sample reports for any EPIC profile
- Create, save, or manage custom email messages
- View the default email messages generated by EPIC

Go to Help:
Whenever you need help! You can search and access detailed EPIC information 24 hours a day, 7 days a week. It's the quickest way to search for anything EPIC-related. Several animated tutorials are also available.

A quick overview of these key EPIC features can be found on the following pages.
Detailed help on all EPIC features can be found by logging onto EPIC and selecting Help.

Manage Reports: Overview

Just move your cursor over Manage Reports and a drop-down menu will appear.
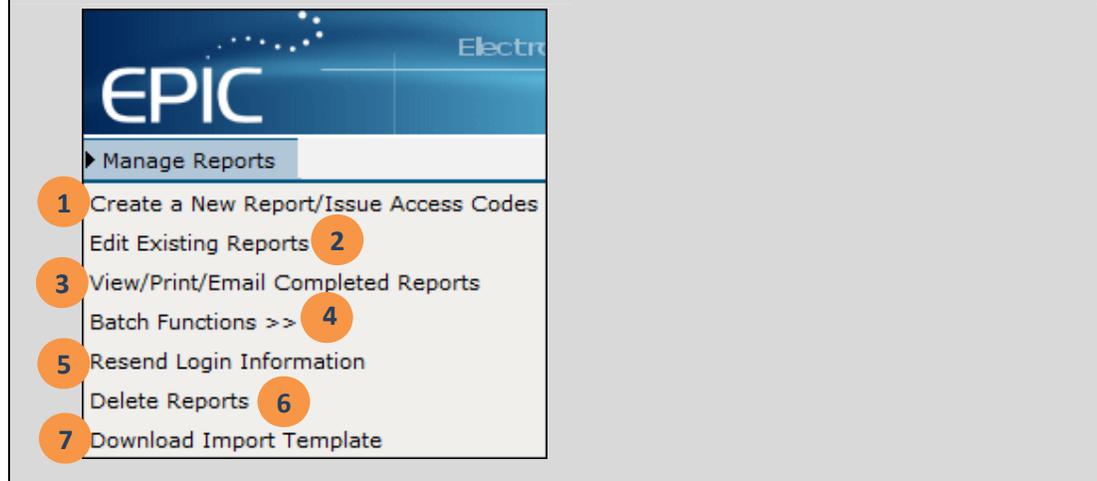
1 Create a New Report/Issue Access Codes

When you need to send an access code, go here to**:**
- Email access codes to participants for EPIC profiles
- Create a group report with people who have completed their profile

2 Edit Existing Reports

If you've sent an access code and need to make a change, go here to:
- Edit a participant's name or email address
- Change the participants in group reports
- Change the ability for a participant to view or not view their profile
- Move a profile into a different folder
- Use the basedata from an *Everything DiSC®* profile to create a different *Everything DiSC* profile

3 View/Print/Email Completed Reports

When participants have completed their access codes, go here to:
- View, print, or email completed profiles

4 Batch Functions

Work with a group of reports instead of one report at a time. Here you can:
- Generate a group of profiles at once, rather than one at a time—this function creates a compressed file to download to your computer. After extracting the files, you can print the reports individually or all at once, depending on your printer capabilities
- Change a group of profiles viewing ability from YES to NO, or from NO to YES
- Apply a customized version of an *Everything DiSC®* profile to a group of reports

Manage Reports: Overview (con't)

5 **Resend Login Information**

Resend an access code to a participant who didn't receive the original access code email or deleted the email.

- Doing this will send the participant a copy of the original access code. You do not incur additional charges by resending the access code.

6 **Delete Reports**

Permanently delete reports from your EPIC account. Once you delete a report, you can never get it back.

7 **Download Import Template**

Sending access codes to a big group? The *Individual Respondent Template* lets you upload multiple participant names and email addresses at once, instead of entering information one person at a time.

If you're sending requests for rater information to a large group for *Everything DiSC 363® for Leaders,* a special template called *Everything DiSC 363 for Leaders-Rater Template* is available.

The templates are Excel spreadsheets that can be used in conjunction with the *Import Respondents* feature on the *Create a New Report/Issue Access Codes* page.

Manage Your Account: Overview

Just move your cursor over Manage Your Account and a drop-down menu will appear.

Manage Your Account
8 Transfer Credits to Parent Account
Account Activity Reports >> **9**
10 Unassign Access Codes/Reclaim Credits
Folder Maintenance **11**
12 Credits Charged for Reports

8 **Transfer Credits to Parent Account**

Please contact your Inscape Publishing Authorized Distributor to discuss EPIC credits.

9 **Account Activity Reports**

Reports to help you analyze your EPIC system usage.

Here you can:
- View your EPIC account activity
- See a list of completed profiles
- Retrieve a list of unassigned access codes
- See which leaders and raters still need to complete *Everything DiSC 363® for Leaders* feedback

10 **Unassign Access Codes/Reclaim Credits**

When you send an access code to a participant and they don't complete their profile, you can unassign the access code and return the EPIC credits used to send the profile to your account. You can even send a note to the participant to let them know the access code has been deactivated.

11 **Folder Maintenance**

Organize completed EPIC reports in a folder system.
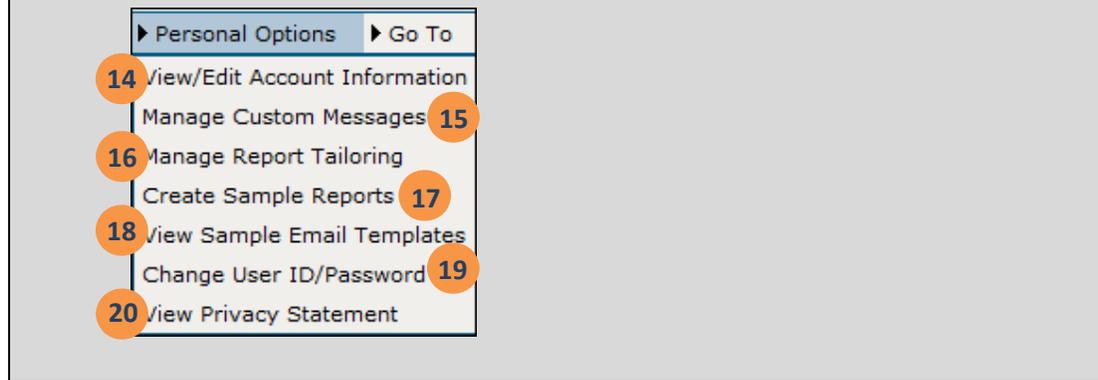
Here you can:
- Create your EPIC filing system, using folders and subfolders
- Rename and delete folders
- Move contents of a folder to a different folder
- Move unfiled profiles into folders

12 **Credits Charged for Reports**

A list of credits charged for all EPIC reports.

Personal Options: Overview

Just move your cursor over Personal Options and a drop-down menu will appear.

▶ Personal Options   ▶ Go To
14 View/Edit Account Information
Manage Custom Messages **15**
16 Manage Report Tailoring
Create Sample Reports **17**
18 View Sample Email Templates
Change User ID/Password **19**
20 View Privacy Statement

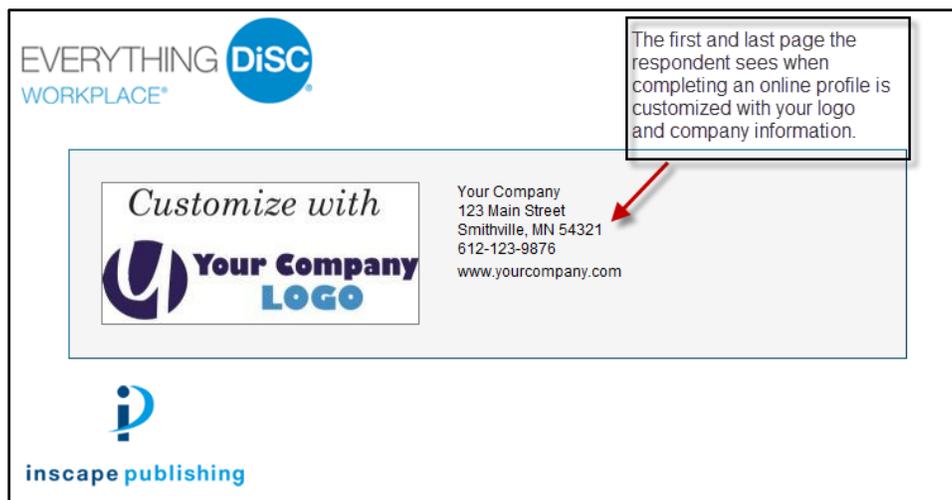**14** **View/Edit Account Information**

Edit the information that appears on the cover of all your EPIC profiles and change many default settings of your EPIC account.

You can personalize your company details and logo on:
- Participant's report covers
- The screen they first see when they click on their access code link
- The screen they see when they're done completing their access code

You can also set several default settings for EPIC features:
- Report viewing capability: choose whether a participant can see their profile
- Enable the access code future delivery and auto reminder features
- Credit balance reminder: get an email when you are low on credits
- Default time zone settings
- Customize your access code email subject line
- Profile completion notification: get an email when a profile has been completed

EVERYTHING DiSC
WORKPLACE®

Customize with
U Your Company
LOGO

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

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

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Personal Options: Overview (con't)

15 **Manage Custom Messages**
You can create custom email messages to use when sending out access codes. You'll save time and make sure your messaging is consistent.

16 **Manage Report Tailoring**
Everything DiSC® profiles can be tailored to fit your needs. Create a tailored version of a profile to reorganize pages, delete selected pages, or change the report title. Plus, you can save the tailored version so you don't have to do it again!

17 **Create Sample Reports**
Create free sample reports for any EPIC profile**.** The personalized information you entered in View/Edit Account Information will appear on the cover of the profiles, which makes them great marketing tools. Sample reports can be viewed, printed, downloaded, or emailed.

18 **View Sample Email Templates**
View the default email messages generated by EPIC. These messages are automatically sent when you use EPIC functions. Email templates are divided into two categories:

- Access Code Related: messages sent when you assign, unassign, delete, or resend access codes
- Account Related: messages sent when working with your Sub Accounts when you create an account, add or remove profiles, or transfer credits

19 **Change User ID/Password**
Change your EPIC user ID and password. Passwords must be at least four characters and can be any combination of letters, numbers, or special characters.

20 **View Privacy Statement**
Inscape's policies on storage and security of data gathered in the EPIC system.

Glossary of Terms

Access Code: An access code is a unique link to an Inscape assessment. Access codes are sent via email to participants.

Batch Functions: Batch functions allow you to work with a group of profiles at one time rather than one profile at a time.

Credit: Credits are the currency of the EPIC system. They are used to issue access codes or create reports.

Group report: A group report is a compilation of participant assessment data. Group reports include:

- **Facilitator Reports:** For facilitators to use when preparing for a session. Includes participant names, so it is not intended for distribution.
- **Group Reports:** For facilitators to use when preparing for a session. Does not include participant names, so it can be distributed.
- **Team View Reports:** An at-a-glance look of participant names and data. Not intended for distribution.

Primary Account: A Primary Account is an EPIC account held by an Inscape Publishing Authorized Distributor. Only Primary Accounts can purchase EPIC credits from Inscape.

Profile: A profile is a completed access code. The completed profile is often given to participants when the classroom training session begins.

Participant: A participant is the person who responds to an assessment and receives the Inscape profile.

Sub Account: A Sub Account is a client that is set up to handle their own EPIC account but still purchases credits from the Primary Account.

Supplemental Report: A Supplemental Report is a report that is an add-on report. Supplemental Reports cannot be generated unless an access code has been completed.

Tailored Profile: *Everything DiSC®* profiles can be tailored to fit your needs. Create a tailored version of a profile to reorganize pages, delete selected pages, or change the report title.

Technical Support

You'll find answers to most of your questions about EPIC on EPIC in the Help section. If you can't find what you need, contact your Inscape Publishing Authorized Distributor directly.