

**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 assessments.

Log in at admin.inscape-epic.com.

Intesi! Resources

www.IntesiResources.com

Call Toll Free: 1-866-346-8374

WILEY

Table of Contents

EPIC Introduction	Page 3
EPIC Functions	Page 4
Manage Reports	Pages 5-6
Manage Your Account	Page 7
Personal Options	Pages 8-9
Glossary of Terms	Page 10
Technical Support	Page 11

EPIC Introduction

EPIC is a secure website that gives you a stress-free way to manage your assessments. From customizable features to a growing list of functions, EPIC-based profiles offer advantages even our 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

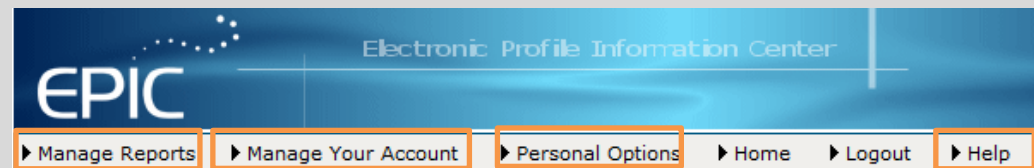
Make training stick with exclusive EPIC follow-up reports! You can build group reports from participant profiles in your EPIC account and easily move people in and out of group reports as teams change.

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

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

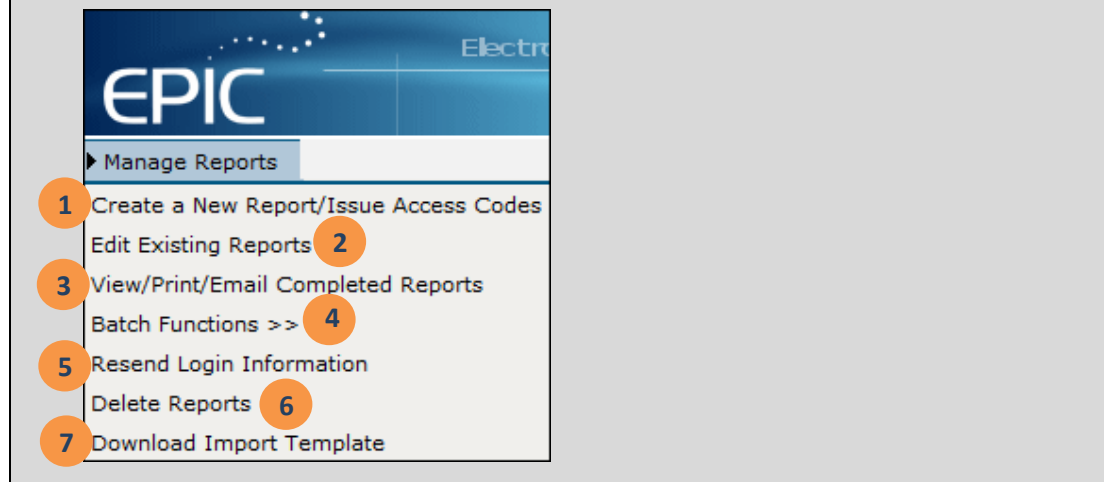
Go to Help:

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

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 base data 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 (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.

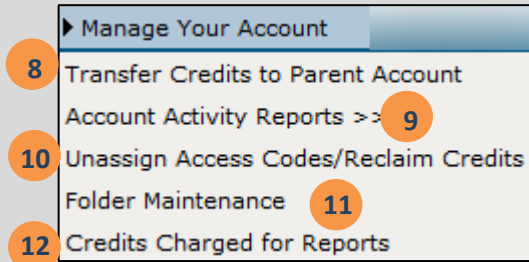
If you're sending requests for rater information to a large group for *Everything DiSC 363® for Leaders*, a special template called *Everything DiSC 363 for Leaders-Rater Template* is available.

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.

The screenshot shows a web form titled "Add Respondents" with a blue header bar containing a question mark icon. Below the header, there is instructional text: "After entering the Respondent information, click the **Add Respondent** button to add the name to the list. Click the **Assign Access Codes** button when you're finished adding Respondents." A note follows: "(Note: If you assign more than 10 Access Codes, they will be queued for delivery and sent out in intervals to avoid being marked as 'spam' by the Respondent's email server.)" The form contains four input fields: "Email Address:" (a text box), "Quantity:" (a numeric box), "View Report:" (radio buttons for "Yes" and "No", with "No" selected), and "Name:" (a text box). Below these fields is a blue "Add Respondent" button. At the bottom left, there is a link labeled "Import Respondents" with a plus sign icon, and a red arrow points to this link. A question mark icon is also present in the bottom right corner of the form area.

Manage Your Account

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



8 Transfer Credits to Parent Account

Please contact your Everything DiSC Authorized Partner 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:

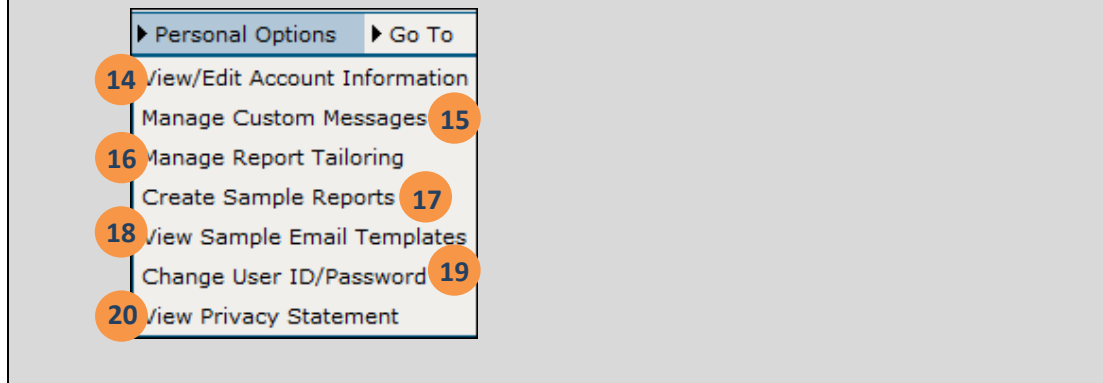
- Create your EPIC filing system, using folders and subfolders
- Rename and delete folders
- Move contents of a folder to a different folder
- Move unfiled profiles into folders

12 Credits Charged for Reports

A list of credits charged for all EPIC reports.

Personal Options

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



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



Personal Options (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

Our policies on storage and security of data gathered in the EPIC system.

Glossary of Terms

Administrator: The person with a unique user ID and password that manages all functions of the EPIC account.

Access Code: An access code is a unique link to an EPIC 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.

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 profile.

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 Everything DiSC[®] Authorized Partner directly.