

## Quick Start Guide

### *Welcome to EPIC*

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

EPIC gives you the power and flexibility to:

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

Log in through **[www.inscape-exchange.com](http://www.inscape-exchange.com)** and select **My EPIC** or log in directly at **[admin.inscape-epic.com](http://admin.inscape-epic.com)**



EPIC Electronic Profile Information Center

User ID: tjsc  
Timeout: 60 min  
Credit Balance: 1,398

▶ Manage Reports ▶ Manage Your Account ▶ Personal Options ▶ Go To ▶ Home ▶ Logout ▶ Help

Welcome Thomas J Smith

EPIC News

May 15, 2007

The EPIC **Home** page contains information on new product releases, tips for using the system, and general information from Inscape on how to get the most out of your EPIC virtual warehouse.

**Credits** are the currency used to generate reports in the system. Your current credit balance is shown at the top of the page.

A link to **Inscape Exchange** is provided under the Go To menu item so you can seamlessly move between the two systems.

## System Overview

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

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

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

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

- Contact Information
- Company logo
- Company name

You also can change the default settings for EPIC features such as:

- Credit reminder
- Email subject line
- Completion notification

## **Basic System Navigation**

The options available to you in each of these functional areas can be quickly reviewed by moving your cursor onto the name (e.g., Manage Reports) that appears on the EPIC command line. A sub-menu will appear showing you a list of the features available.

▶ Manage Reports

- Create a New Report/Issue Access Codes
- Edit Existing Reports
- View/Print/Email Completed Reports
- Resend Login Information
- Delete Reports
- Download Respondent Import Template

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

**Edit Existing Records** lets you view and edit information such as name and email address for respondents you have in EPIC. You can also add or change participants in existing Group Reports, add supplemental reports to an existing profile (if

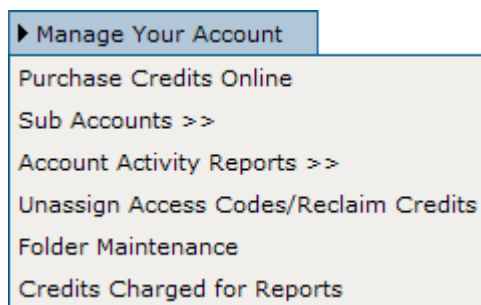
available), and change the storage (folder/sub folder) location where the report is stored.

**View/Print/Email Completed Report** allows you to act on all of the completed reports in your EPIC account and view, print, or email the report to any valid email address.

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

**Delete Reports** lets you permanently remove individual reports or Group Reports from your EPIC system.

**Download Respondent Import Template** provides you with an Excel spreadsheet that can be used to upload large groups of names to the system using the Import Respondent feature.



**Purchase Credits Online** allows you to purchase credits directly from Inscape over the Internet. The maximum number of credits you can purchase is shown in your Online Credit Limit. Charges for the credits will be billed against the credit card you have on file with Inscape Publishing Customer Service.

The **Sub Accounts** section gives you the ability to create new Sub Accounts, establish a line of credit for selected accounts, add or remove products, send login information, reset their password, transfer credits, view their current product list, and see a summary of reports that have been completed. If you do not have any Sub Accounts, this menu item will not be displayed.

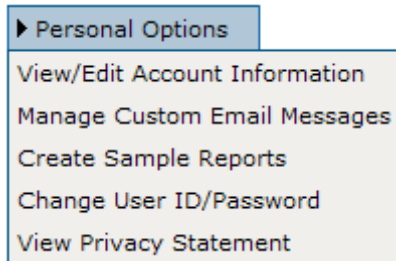
**Account Activity Reports** provides you with reports on your usage of the EPIC system. You can:

- View a history of your account activity
- Review profiles that have been completed in either a detailed or summary analysis
- Retrieve a list of all reports for which access codes have been issued but the report has not been completed

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

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

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



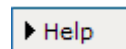
**View/Edit Account Information** is used for viewing and editing information about your Administrator account. You can change your company information (e.g. name, address, phone, etc.), upload your company logo, and set defaults for some of the features of the EPIC system.

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

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

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

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



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



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

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

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

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

## [Technical Support](#)

Inscape Publishing strives to provide state-of-the-art support for its customers. If you have questions about using the EPIC system, and have not found the answers in the online Help, or on the Inscape Publishing distributor website [www.Inscape-Exchange.com](http://www.Inscape-Exchange.com), please contact Inscape Technical Support at 888-322-0917 from 9:00 a.m. - 5:00 p.m. CT Monday - Friday.

## Personalized Output

DISC Classic 2.0

Sarah Johnson  
Tuesday, July 27, 2004

This report is provided by:

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

inscape publishing

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

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

DISC Classic 2.0

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

powered by  
inscape publishing  
©2003 by Inscape Publishing, Inc.

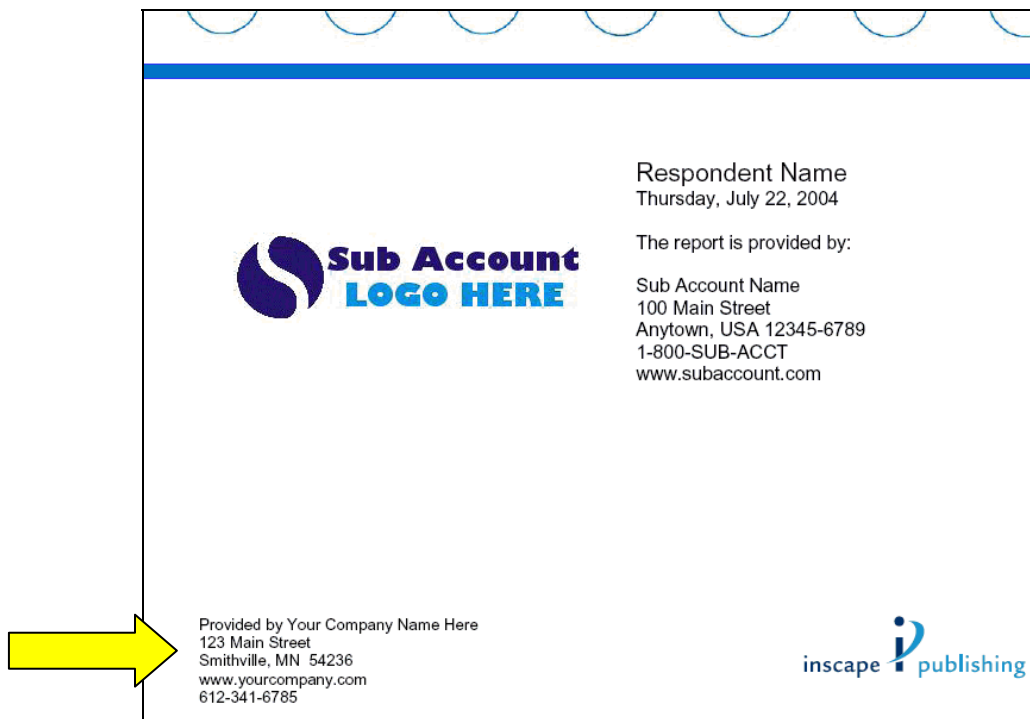
NEXT

## Working with Sub Accounts

All Inscape Distributors are setup in EPIC as Primary Accounts. If you are working with a client who would like to issue their own access codes for online profiles and manage the EPIC administration on their own, you can create a **Sub Account** for them. For large companies or structures that require a hierarchical structure, up to five levels of Sub Accounts are supported by EPIC.

As a Primary Account holder you can:

- Add five lines of contact information for your company on the front cover of all reports generated by your Sub Accounts (see sample below)
- Add personalized messages to the EPIC home page for your Sub Accounts providing them with product information or other news that you feel is important
- Create a line of credit for your Sub Accounts so they can get credits from your account when needed
- Review product usage for each Sub Account to view the products they are using
- Generate Group Reports from **your** EPIC account using records from your Sub Account's EPIC system (Note: Approval by the Sub Account is required to activate this feature)
- Add or remove products/profiles from your Sub Account's EPIC system either individually or as a group



## EPIC System Requirements

- Windows 2000, XP or higher for the PC
- Mac OS 10 or higher for the Apple Computer
- Internet Explorer 6.0, Netscape Navigator 8.0, Firefox 2, Safari 1.4 or higher
- Adobe Acrobat Reader 5.0 or higher
- Cookies need to be enabled on the computer  
(Note: The cookies used by EPIC are not permanent - they expire after 24 hours)