EPIC Help Online
for Sub Accounts

This document is a tangible copy of the online version of EPIC Help, and will be updated to reflect any improvements to the online version.

Always log in to EPIC and check for a newer version before printing or distributing.

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1 | P a g e

Table of Contents

Help Home

Welcome to EPIC Help!

Choose a **Quick Links** topic below, browse through the 📁**Contents** tab, or use 🔍**Search** to find your topic.

Quick Links

Create New Reports

- Create a New Report / Issue Access Codes

Edit Existing Reports

- Edit One Report
- Edit Many Reports at One Time

Print or Email Completed Reports

- View/Print/Email One Report
- View/Print Email Many Reports at One Time

Your EPIC Account

- View/Edit Account Information

Sub Accounts

- Create a New Sub Account
- Manage Individual Sub Accounts
- Sub Account Settings

MyEverythingDiSC.com

- Add MyEverythingDiSC.com to Access Codes
- Add MyEverythingDiSC.com for Sub Accounts

Search for Help

Enter text in the **Search** box in the upper right corner of your screen and press **Go** to open the Search tab and return a list of relevant topics.
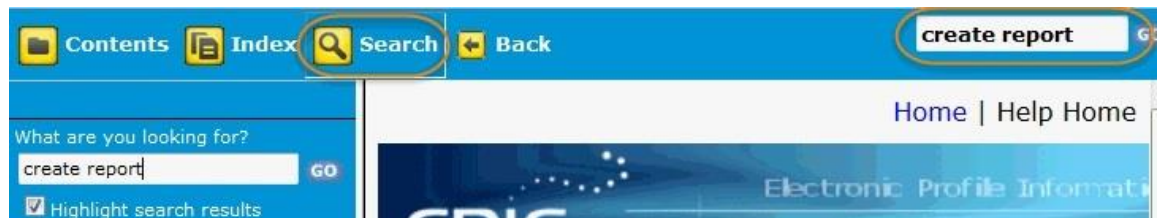
Browse Contents

Use the **Contents** tab to browse topics by EPIC menu order.

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Phone: (877) 311-DISC Email: wiley@internalchange.com
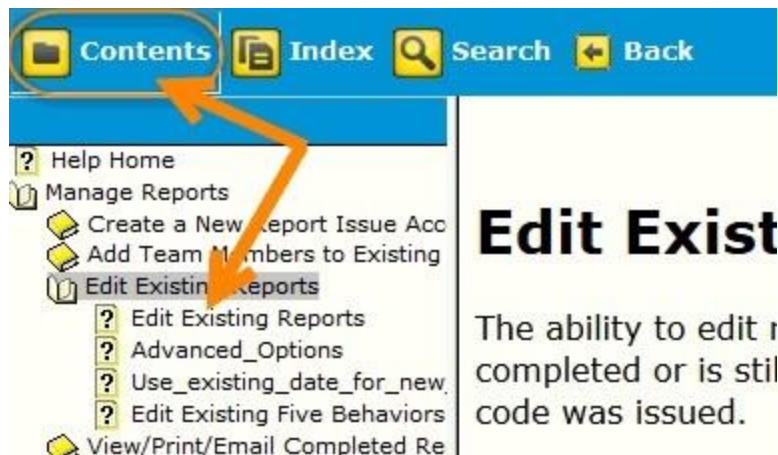
About EPIC

EPIC is a secure website that allows you to easily create and manage custom online profiles. EPIC offers report options to aid in program facilitation and options which offer an expanded user experience. EPIC's growing list of functions offer advantages even our paper instruments can't match.

Access with Options

EPIC is a web-based program you can access at any time—issue Access Codes, monitor report completion, and print reports from anywhere in the world. Once a Respondent completes an assessment, EPIC scores and generates their personalized profile right away. Respondents can view their profile online immediately after they complete an assessment, or you can print them out to provide in-person.

Efficient Administration

Using EPIC helps conserve valuable training time by reducing administrative tasks. Respondents 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.

Customizable Features

You can personalize Everything DiSC reports with your company name, training program, and logo. Your company information also appears on the Respondent Site, and in emailed information from EPIC, providing Respondents with a consistent association with your brand.

You can also tailor Everything DiSC® profiles to incorporate them section-by-section into your facilitation time line. Profile sections and pages can be rearranged and/or removed at any time for both the online profile and printed versions.

Exclusive Extras

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

Terms and Definitions

Access Code: a unique 10 character alpha-numeric code randomly generated by EPIC for each new profile/report created. The Access Code is provided (typically via email) to the Respondent, and ties a Respondent's online assessment responses to a profile/report. Access Codes provide a means for EPIC administrators to determine if and when an online assessment is complete.

Completed: Reports/Profiles and Access Codes have a status of completed in EPIC when minimum requirements are met for report generation. Individual profiles have a completed status when the Respondent has completed an online assessment. Multiple-respondent reports have a completed status when the Leader and a minimum number of required Raters/Observers has been met. Team reports have a completed status when a minimum number of required team members have completed their online assessments.

Credit: the currency used in EPIC; needed to create new Sub Accounts, new reports, issue Access Codes, and add supplemental reports.

EPIC Administrator: an EPIC account holder with either a Primary or Sub Account.

Multiple-respondent report: Products in EPIC which allow for a Leader and Raters/Observers to complete an assessment regarding the Leader are considered multiple-respondent reports. Report generation requirements depend upon Rater/Observer type and the number of any type which have completed the online assessment.

Online Assessment: a series of product-based questions asked of a Respondent via the EPIC Respondent Site, the responses being the data used to create profiles/reports for EPIC products.

Parent Access Code: a unique 10 character alpha-numeric code randomly generated by EPIC for each new team or group profile/report created. Parent Access Codes act as a bond between individual Access Codes, providing a means for EPIC administrators to both create and edit reports, and to determine if and when individual team members have completed their online assessments, including when the minimum number of team members has been met to allow for report generation.

Participant (or Respondent): one who has been given an Access Code allowing access to the EPIC Respondent Site, in order that they may complete an online assessment for a profile.

Pending: Reports/Profiles and Access Codes have a status of pending when either an individual online assessment has not yet been completed, or when a multiple-respondent or team report cannot yet be generated because minimum report generation requirements have not been met.

Primary Account: top level EPIC account created by Partner Care for an Authorized Partner.

Profile (or Report): EPIC products are referred to as profiles or reports.

Respondent (or Participant): one who has been given an Access Code allowing access to the EPIC Respondent Site, in order that they may complete an online assessment for an Inscape profile.

Respondent Site: the online assessment system used to gather Participant responses in order to create profiles.

Report (or Profile): EPIC products are referred to as profiles or reports.

Sub Account: a client account created in EPIC by an Authorized Partner or by Partner Care.

EPIC Functions

Set Up and Manage Your Account

Add your company information, logo and contact information in EPIC in order to add your brand to profile cover pages, to the Respondent Site, and to EPIC Sub Accounts.

Also set up your email format and default email subject line, and choose to have EPIC notify you when Respondents complete their profiles.

Menu Location: **Personal Options** ▸ **View/Edit Account Information**

Create New Reports/Issue Access Codes

Enter Respondent information to send Access Codes and create profiles, or choose completed individual reports to make a new group or team report.

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

Edit Existing Reports

Add or remove members from an existing team or group report, change Respondent information, or add or remove report options for pending and completed reports.

Menu Location: **Manage Reports** ▸ **Edit Existing Reports**

Menu Location: **Manage Reports** ▸ **Edit Existing Five Behaviors Team**

Send a Reminder to Respondents

Send an email to Respondents who have not yet completed their online assessments.

Menu Location: **Manage Reports** ▸ **Resend Login Information**

View/Print/Email Completed Reports

Generate completed reports to print, save, or email to Respondents. Choose specific profile sections to print to match your program facilitation.

Menu Location: **Manage Reports** ▸ **View/Print/Email Completed Reports**

Unassign Access Codes/Reclaim Credits

Unassign pending Access Codes to have credits returned to your EPIC account.

Menu Location: **Manage Your Account** ▸ **Unassign Access Codes/Reclaim Credits**

Manage Reports

Create a New Report Issue Access Codes

Create a New Report/Issue Access Codes
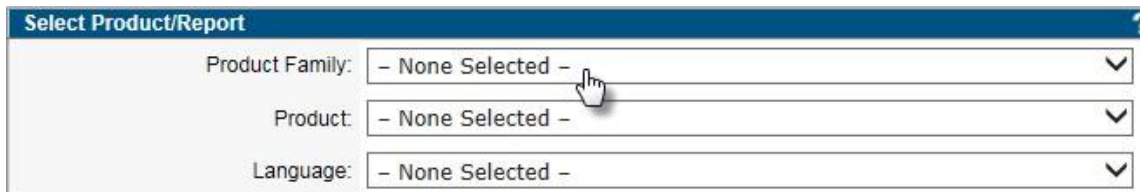
Use this function to create new reports or issue new Access Codes.

- ⏱**Saver** To use an existing Respondent's data to create a new report for them, use the upgrade an existing report to a new report function.

- 🔺To add new team members to an existing Five Behaviors team, use the Edit Existing Five Behaviors Team function.

To Create Your Reports

1. Go to **Select Manage Reports** ▶ **Create a New Report/Issue Access Codes**

2. **Product Family, Product, and Language**

   Product Family, **Product** and **Language** selections are required before you can continue. Make your selections and press **Next**.

Select Product/Report		?
Product Family:	– None Selected –	⌄
Product:	– None Selected –	⌄
Language:	– None Selected –	⌄

   Tip: Set your default language at: *View/Edit Account Information*

3. **Creation Method**

- Choose **Assign Access Code(s) for an Online Product/Report** to send an email to Respondents which includes a link to their online assessment.

- Choose **Enter Tally Box scores to produce a report** (available for DiSC Classic Products) and enter scores from completed 28-box DiSC family profiles to create an electronic report.

- **Create an Access Code Extract File:** EPIC creates an Access Code spreadsheet in your EPIC account. *(See More...)*

4. **Report Options**

Report Options vary by product, and only options which are applicable to the product with which you are working are displayed.

- **Report Options Section:** Choose how the completed profile looks when viewed online or printed from EPIC.

  - Graphs 1 and 2 and Tally Box Scores.

  - Report Sections: displays a list of possible report sections for the chosen product.

- **Response Style:** A phrase version of the online assessment is available for some DiSC Classic products.

- **Product Tailoring:** choose your pre-designed tailoring to apply.

Product Tailoring

Choose a tailored version of the report from the list, or choose "None Selected" to use the standard Report.

Section I Rearranged

- See Manage Report Tailoring to set up or edit product tailoring for a report.

- **MyEverythingDiSC.com Options:** Available for Everything DiSC products.

MyEverythingDiSC.com Options

Check the boxes to enable options for the MyEverythingDiSC.com website.

Check All | Uncheck All

☑ Tell Me More About My Style
☑ Tell Me More About DiSC
☑ Everything DiSC Sales Customer Interaction Maps
☑ Everything DiSC Comparison Reports

- **Supplemental Reports**: Available for DiSC PPSS Products (credit charges apply).

5. **Report Details**

Folders and Subfolders

Choose a folder/subfolder in which to create new Access Codes or select the New Folder link to create a new folder.

Folder: Five Behaviors   New Folder

Sub Folder: Echo Company Tech Team   New Sub Folder

Saver Folders are the recommended way to search for reports. Create your new reports in folders/subfolders to quickly locate them later.

***See Also**: Folder Maintenance*

Report Name

Enter a report name for products with this option. The report name does not appear on the cover of the report, but can be useful when searching for the report.

Report Name: Echo Company Leadership Team

Team Name

A team name is required for The Five Behaviors of a Cohesive Team reports, and appears on the cover of each report. Use a unique name for each team to easily differentiate between teams when searching for similar reports.

Team Name: Hudson IT Group

6. **Delivery and Auto Reminder Options**

Choose a future delivery date for your Access Codes and/or set up an automatic reminder to be sent to pending Access Codes. Enable Future Delivery and Auto Reminder in the Advanced Options section of the View/Edit Account Information function.

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Phone: (877) 311-DISC Email: wiley@internalchange.com

A. To set a future delivery date, select the **On this date** radio button and specify a date and time for Access Code delivery (note your time zone settings).

B. To set up an auto reminder, select the **If not completed by** radio button and specify a date and time to send a reminder to Respondents.

    A. Respondents with **pending** Access Codes receive the reminder.

    B. The auto reminder email uses the same email content (body text) as your original email message. To use a new custom message, do not use the auto reminder option; instead use Resend Login Information.

    C. To specify a one-time custom reminder subject line, first activate the "**Allow me to customize the subject line for the Auto Reminder email**" feature in the Advanced Options section of View/Edit Account Information.

C. EPIC assigns a Group ID for your custom delivery and reminder. Refer to this Group ID when editing delivery and reminder dates/times using the Edit Delivery Options for Access Code Groups function.

7. **Add Respondents, Participants, and Team Members**

The Add Respondents function varies by product:

    Add Individual Respondents

- Enter an email address and a name for a Respondent, then press the **Add**… button (depending on product, button will read Add Respondent, Add Rater, Add Observer, or Add Team Member).

Add Raters/Observers: Although it does not affect the issuing of Access Codes, minimum requirements must be met in order for EPIC to generate a 363® or LPI® report.

- A minimum number of Raters/Observers of any one type must be met before EPIC will generate a completed report. Minimums are:

    - Manager = 1
    - Peer/Coworker = 2
    - Direct Report = 2
    - Other = 2

- **Note**: You do not need to use all of the Rater/Observer types.

- In cases where you want to generate the report and the minimum has not been reached (or may never be reached) you can use the Edit Exiting Reports function to change the Rater/Observers type or use the Include function to temporarily remove any Rater/Observer responses from the report.

- **Quantity:** When quantity is available, you can enter a number to send more than one (1) Access Code to the email address entered.

- **View Report:** Choose **Yes** to allow the Respondent to view their completed report online immediately upon completion. Choose **No** and you have the option of changing to **Yes** at a later date.

- ▲ Five Behaviors reports have a default view of **No.**

- 363® Everything DiSC 363 for Leaders and LPI® LPI: Next Generation reports are not available to be viewed by the Leader.

- **Gender:** Entering a gender for ED 363 for Leaders and LPI: Next Generation report tailors the assessment to properly refer to the Leader as "he" or "she".

Import Respondents ⏱Saver

Press the **Import** link and upload an Excel spreadsheet of Respondents, Raters or Observers.
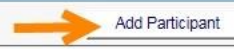
See Download Import Templates for more.

Add Participants

Create a Group Report by adding participants with completed profiles. Press the **Add Participant** button for a product, then use Search to locate and select participants to add to the Group Report.

Add Team Members (▲ The Five Behaviors of a Cohesive Team)

While creating or editing a The Five Behaviors of a Cohesive Team report, EPIC allows you to add individual Respondents, import Respondents from Excel, and use existing, completed Everything DiSC and Five Behaviors reports.

Add Team Members

You can add new team members using any method or combination of methods below.

| Enter Individual | Import from Excel | Use Existing Report |

The **Use Existing Reports** tab allows you to use Respondents who have completed an Everything DiSC or Five Behaviors profile in your new team. These Respondents will not be asked the Everything DiSC questions portion of the assessment again, and will instead complete only the Five Behaviors team assessment.

To Use Existing Reports:

1. On the **Use Existing Reports** tab, press the **Search** button.

2. Search for completed Everything DiSC and Five Behaviors individual reports.

3. Select the reports for the Respondents you wish to add to the new Five Behaviors team.

4. Press the **Next** button to confirm inclusion of the selected Respondents.

5. To edit a Respondent email address, press the **Edit** link, make your changes, then press the **Save** link to save your changes.

Email Address

| ✗ | rami.sivula@inscapepublishing.com | Save Cancel |
| ✗ | julie.hansen@inscapepublishing.com | Edit |

8. **Press Next button or Assign Access Code(s) button**

Button name varies by product. Button is always on the bottom left side of the page.

| Assign Access Code(s) | | Next >> |

9. **Confirm Credits Deduction**

Press the **OK** button to continue to create your Access Code(s).
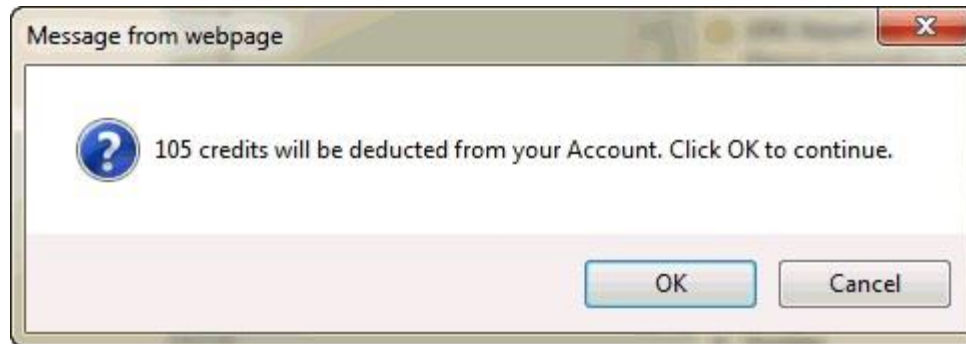
10. **Custom Email Subject/Body Options**

Press the **Cancel** button to send the default email address and subject line. Press **OK** to customize the email message.
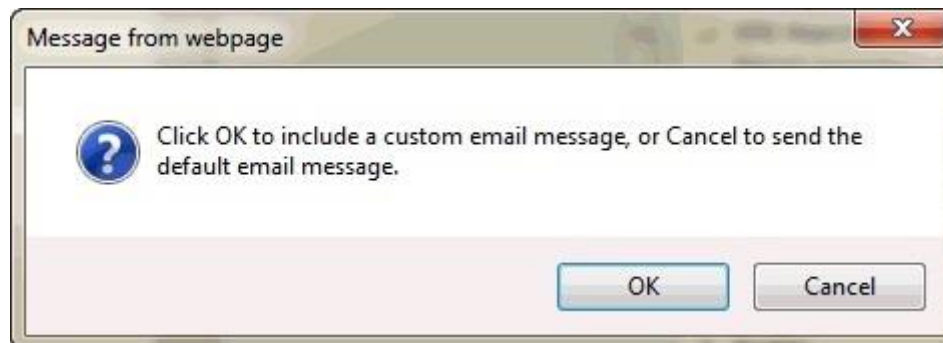
See *Manage Custom Messages* & *Use Custom Messages* for more info.

11. **Your reports have been created - review the confirmation screen**

- The confirmation screen varies by product and displays:

- A **Summary** section of credit activity associated with the transaction.

- Press the plus sign ⊞ to the left of the **Details** link to open the **Details** section and view the list of Respondents. The **Status** column shows Access Code creation and email delivery information.

Respondents				?
⊟ Details				
Email Address	**View Report**	**Name**	**Status**	
epicsub3@inscapepublishing.com	Yes	Geoffery Bault	Access Code created and email sent.	
epicsub2@inscapepublishing.com	Yes	Bridley Maijer	Access Code created and email sent.	
epicsub1@inscapepublishing.com	Yes	Bramford Dominique	Access Code created and email sent.	

Summary

Total Access Codes Created:	3
Previous Credit Balance:	1,029
Total Credits Charged:	75
New Credit Balance:	954

- If you entered more than 10 names on the Assign Access Code Screen or used the Future Delivery option (Delivery Options for Access Codes), the status message will indicate that the Access Code was created and email has been queued for delivery.

Respondents				?
⊟ Details				
Email Address	**View Report**	**Name**	**Status**	
epicsub3@inscapepublishing.com	Yes	Geoffery Bault	Access Code created and email queued for delivery.	
epicsub2@inscapepublishing.com	Yes	Bridley Maijer	Access Code created and email queued for delivery.	
epicsub1@inscapepublishing.com	Yes	Bramford Dominique	Access Code created and email queued for delivery.	

Extract File
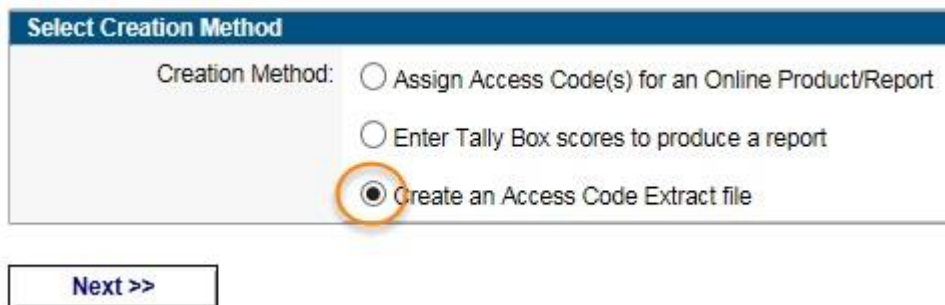
Access Code Extract Files allow you to download Access Codes in an Excel spreadsheet for individual EPIC profiles instead of distributing the Access Codes via individual emails to Respondents. Wiley Partner Care must activate this feature before it is displayed during Access Code creation for applicable products.

⚠ It is critical that you, the administrator, maintain the data privacy requirements of the EPIC system and do not assign the same Access Code to more than one (1) individual. Failure to maintain data privacy requirements causes a serious breach of the Data Protection Policy.

Create an Access Code Extract File

Go to **Manage Reports** ▸ **Create a New Report/Issue Access Codes**, select a Product, Product Family and Language, and press **Next**.

2. Choose **Create an Access Code Extract File** from the **Select Creation Method** section.

3. Select Report Options for the group of Access Codes you wish to create, then press **Next**.

   Report Options vary by product, and only options which are applicable to the product with which you are working are displayed.

   - **Report Options Section:** Choose how the completed profile looks when viewed online or printed from EPIC.

     - Graphs 1 and 2 and Tally Box Scores.

- Report Sections: displays a list of possible report sections for the chosen product.

Report Options

Check a box to display an option in the report.

Check All | Uncheck All

☑ Discovering Your DiSC® Style

☑ Understanding Other Styles

☑ Building More Effective Relationships

☑ Personalized Style Index

- **Response Style:** A phrase version of the online assessment is available for some DiSC Classic products.

- **Product Tailoring:** choose your pre-designed tailoring to apply.

Product Tailoring

Choose a tailored version of the report from the list, or choose "None Selected" to use the standard Report.

Section I Rearranged

- See Manage Report Tailoring to set up or edit product tailoring for a report.

- **MyEverythingDiSC.com Options:** Available for Everything DiSC products.

MyEverythingDiSC.com Options

Check the boxes to enable options for the MyEverythingDiSC.com website.

Check All | Uncheck All

☑ Tell Me More About My Style

☑ Tell Me More About DiSC

☑ Everything DiSC Sales Customer Interaction Maps

☑ Everything DiSC Comparison Reports

- **Supplemental Reports**: Available for DiSC PPSS Products (credit charges apply).

4. Choose a Folder and Subfolder in which to store the Access Codes.

Report Information

Product:	Everything DiSC Sales Profile
Language:	English
Report Options:	Section I: Understanding Your DiSC Style, Section II: Recognizing and Understanding Customer Buying Styles, Section III: Adapting Your Sales Style to Your Customer's Buying Style, Appendix, Require Email Address, Tell Me More About My Style, Tell Me More About DiSC, Everything DiSC Sales Customer Interaction Maps, Everything DiSC Comparison Reports

3 Folder: – None Selected – ☑ New Folder

Sub Folder: – None Selected – ☑ New Sub Folder

Allow Respondent to view Report online?: ● Yes ○ No 4

Credits per report: 25

Report Quantity

Quantity: 12 5

Total Credits: 300

Create Report 6

5. Choose **Yes** to allow the Respondent to view their report online once they complete their assessment.

6. Enter the Report Quantity, and the Total Credits to be charged are automatically calculated.

7. Press the **Create Report** button and confirm the credit deduction.

Download an Access Code Extract File

Immediately following Access Code extract file creation, select the **Download File** button and save the extract file to your computer.

Manage Reports
Create a New Report/Issue Access Codes • Download Access Code Extract File

Your Access Code Extract File has been created. Click the **Download File** button to download the file.

Download File

To download an extract file at any time, choose **Manage Reports** ▸ **Download Access Code Extract File** and press the **Download File** link.

Download Access Code Extract File

To download your Access Codes, click the **Download File** link.

Date	Product	Language	Quantity	Credits	Download
7/21/2014 8:48 AM	DiSC Classic 2.0	English	3	30	Download File
7/17/2014 4:17 PM	Everything DiSC Work of Leaders	English	1	25	Download File
7/10/2014 10:03 AM	Everything DiSC Sales Profile	English	2	50	Download File
5/14/2014 2:29 PM	Everything DiSC Workplace Profile	English	2	30	Download File

Graphs 1 and 2 and Tally Box Scores

Report Options

Check a box to display an option in the report.

Check All | Uncheck All

☑ Graphs 1 and 2

☑ Tally Box Scores

The Scoring and Data Analysis Page that is displayed at the end of DiSC Classic 1.0, DiSC Classic 2, and DiSC Classic 2 Plus reports can be generated in four (4) different configurations:

- **Graph 3 only**
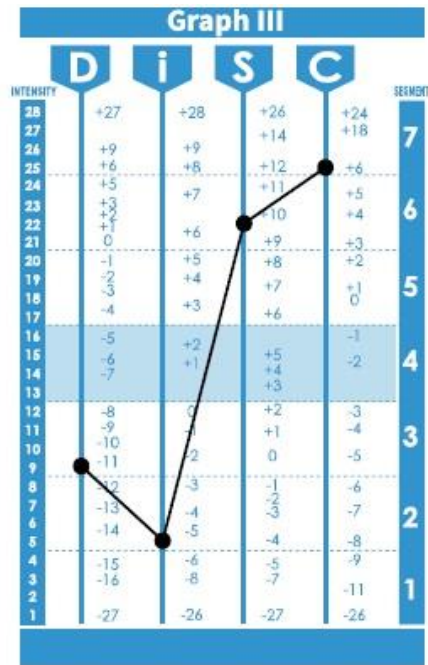
SUMMARY OF INTERPRETATION

Highest DiSC Dimension(s): Conscientiousness (C)

Classical Pattern: Perfectionist Pattern

Segment Numbers: 3267

- **Graph 3 and Tally Box Scores**

Graph III

D i S C

	D	**I**	**S**	**C**	**N**
Most	5	3	4	9	7
Least	16	6	2	4	0
Difference	-11	-3	2	5	

Tally Box

SUMMARY OF INTERPRETATION

Highest DiSC Dimension(s): Conscientiousness (C)

Classical Pattern: Objective Thinker Pattern

Segment Numbers: 3236

- **Graphs 1, 2, and 3**
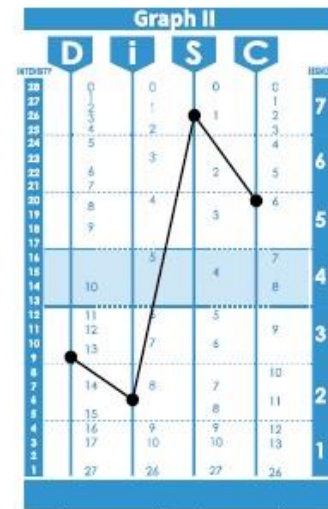
SUMMARY OF INTERPRETATION

Highest DiSC Dimension(s): Conscientiousness (C)

Classical Pattern: Perfectionist Pattern

Segment Numbers: 3267

- **Graphs 1, 2, 3, and Tally Box Scores**

		D	I	S	C	N
Tally Box	Most	5	3	4	9	7
	Least	16	6	2	4	0
	Difference	-11	-3	2	5	

SUMMARY OF INTERPRETATION

Highest DiSC Dimension(s): Conscientiousness (C)

Classical Pattern: Objective Thinker Pattern

Segment Numbers: 3236

Certain Report Options can be applied or removed for a report at any time using one of the following EPIC functions:

- **Edit Existing Reports**: Use the **Change Report Options/Content** button to apply or remove options for a selected report

- **Batch Functions** ▸ **Edit Report Options**: Apply or remove options for many reports

- **View/Print/Email Completed Reports**: Apply or remove options for a selected report

- **Batch Functions** ▸ **Generate Reports for Download**: Apply or remove options for many reports

See Also: *DiSC Classic Graph 1 and 2 Feature in Sub Account Settings.*

Response Style

This option is available for selected languages of DiSC Classic 1.0, DiSC Classic 2.0, DiSC Classic 2 Plus, and DiSC Classic PPSS products. Response style affects the way in which the assessment is presented to the Respondent only; profiles are the same regardless of this setting.

Response Style

Choose the Response Style you would like to use for this report.

◉ Word Version
○ Phrase Version
(?) What's the difference between Word version and Phrase version?

Word Version

> The Respondent is presented with four **words** and chooses one that is "Most Like Me" and one that is "Least Like Me" [Default setting]

Phrase Version

> The Respondent is presented with four **phrases** and chooses one that is "Most Like Me" and one that is "Least Like Me". The phrase response assessment is written at a sixth-grade reading level and allows the use of DiSC across a broader range of Respondents.

Use Existing Respondent's Data to Create a New Report ("Upgrade")

⚠️Note that **Group** and **Team** Reports are not created this way, but are instead created using the Create New Report/Issue Access Code steps. When a group or team report is selected as a product, a section is provided for selecting existing reports to use to create the new group or team report.

- ⏱️**Saver** When you "upgrade" an existing, completed report to a new report, not only is the Respondent's name and email address carried forward, but the Respondent will only be required to answer the product-specific questions for the report and will not have to retake the DiSC Adaptive Testing ("AT") portion of the assessment again. The Respondent's original DiSC AT responses are automatically carried forward to the new report.

- ⏱️**Saver** DiSC Classic products can be upgraded so that Respondent information does not need to be entered into EPIC again; a new assessment will be given to these Respondents.

Upgrade One Individual Report

- Go to **Edit Existing Reports**, locate and select the report you wish to upgrade, then choose the new product/report you wish to create in the **Advanced Options** section. Press the **Use existing data for new report** button to create the new Access Code.

  (See More...)

- 363® Use an existing, completed Everything DiSC 363 for Leaders report to create a NEW EverythingDiSC 363 for Leaders report, and you'll be able to assign all new Raters for a Leader, but the Leader responses will be carried forward to the new report. the Leader will not be required to retake their online assessment.

Upgrade a Group of Reports ("Batch Upgrade")

Upgrade a group of similar products to a new product at **Batch Functions ▸ Use Existing Data for New Report**. Use Search to locate and select the group of reports you wish to use to make new reports, then in the **New Reports** section, choose the new product you wish to create.

Select the new report that will be created. Only eligible products will be displayed.

New Report	
Products:	– Select a Report –
	Everything DiSC Management Profile
	Everything DiSC Sales Profile
	Everything DiSC Work of Leaders

To add additional reports to the list, click the [Everything DiSC Work of Leaders] click the **Next** button to continue. To remove a name from the list, click ✗.

Reports Selected		
Email	Name	Product
✗ epicpub1@inscapepublishing.com	Gail Atright	Everything DiSC Workplace Profile

(See More...)

Edit Existing Reports

Edit Existing Reports

On This Page:

- Edit an Individual Report
- Edit Pending Reports
- Edit Completed Reports
- Advanced Options: Change Report Options/Content button
- Advanced Options: Use Existing Data for New Report

See Also: Batch Edit Report Options

The ability to edit report properties depends on the product type, on whether the assessment has been completed or is still pending, and for some products, on how much time has passed since the Access Code was issued.

See Batch Functions for help on editing multiple reports at one time.

Edit an Individual Report

1. Choose **Manage Reports ▸ Edit Existing Reports**

2. Search for the record you wish to edit.

3. Select the **Edit** link for that record.

   4. To edit the Respondent Information section, change as many fields as you wish and then press the **Save Changes** button. (Note that different changes are allowed for Pending vs. Completed Access Codes.)

OR

4. To edit Advanced Options, press the **Change Report Options/Content** button, choose **OK** to continue to the Advanced Options page, make your desired changes, then press the **Save** button.

5. Use a button at the bottom of the page to edit the same report again, return to your search results, or return to the search criteria page.

Edit this Report Again

Return to Search Results   Return to Search Criteria

Edit this Report Again

Press the **Edit this Report Again** button to make additional edits to the same report.

For completed reports, changes made to the email address or any of the name fields will affect the **Edits remaining for this report** field. To make the maximum use of your remaining edits, you can change both the email address and any number of name fields before you press the **Save Changes** button, which will count as one (1) edit only.

Respondent Information   ?
Access Code: K2E4MH4V7M
Edits remaining for this report: 0
Email Address: epicsub3@inscapepublishing.com
Folder: Mark Hanson   New Folder

Return to Search Results

Press the **Return to Search Results** button to be taken back to the search results from which you chose the previous report you edited.

Return to Search Criteria

> Use the **Return to Search Criteria** to be taken to your initial search page, where you can now make changes to the search fields to run another search.

Edit Pending Reports

Select a field below to see notes specific to editing the field for <u>pending</u> reports.

- Email Address

  There is no limit to the number of changes to email address for pending Access Codes.

  Changing the email address will result in a new email to Respondent.

- Leader Name

  363® ED 363 and **LPI®** LPI: Next Generation Leader names cannot be edited once Access Codes have been created. Unassign pending Access Codes and re-create the report to correct changes.

  The name entered by the Leader while taking the assessment will appear on the completed report cover, and not the name entered by the EPIC administrator during Access Code creation.

- Rater/Observer Info

  363® ED 363 Rater and **LPI®** LPI: Next Generation Observer type, name, email address and their inclusion in the report can be changed at any time for pending Access Codes.

- Gender

  For pending **363®** ED 363 and **LPI®** LPI: Next Generation Access Codes, the gender entered determines how the assessment reads to the Raters/Observers ("He/She" etc.). Any edit made to the gender field for the Leader will be seen immediately by Respondents taking the assessment.

- View Online

Set **View Online** to **Yes** to allow Respondents to view their profile online once it is considered to be complete.

View Online must be set to **No** when Include is set to **No** for an individual record in a Five Behaviors team.

- Name entered by Administrator

There is no limit to the number of changes to the name entered by you, the Administrator, for pending Access Codes.

363® ED 363 and **LPI®** LPI: Next Generation Access Codes do not allow changes to Respondent name for pending or completed Access Codes.

- Add or Remove Team Members

⚠Permanently remove a pending individual team member from a Five Behaviors team using the Unassign Access Codes/Reclaim Credits function or the Delete Reports function.

Edit Completed Reports

Select a field below to see notes specific to editing the field for <u>completed</u> reports.

- Email Address

The Respondent's email address can only be changed a total of 2 times (combined) for completed Access Codes.

An **Edits remaining for this report** field is displayed for these records.

- Leader Name

363 ED 363 **LPI** LPI: Next Generation Leader names cannot be edited once an Access Code has been assigned. Unassign pending Access Codes and re-create the report to correct changes.

⚠The name entered by the Leader while taking the assessment will appear on the completed report cover, and not the incorrectly entered name in EPIC.

- Name entered by Administrator

The **Name entered by Administrator** field can only be changed a total of 2 times (combined) for completed Access Codes.

An **Edits remaining for this report** field is displayed for these records.

- Alternate [First/Last] Name entered by Respondent

Alternate First/Last Name can only be changed a total of 2 times (combined) for completed Access Codes.

An **Edits remaining for this report** field is displayed for these records.

The alternate name field is the name entered by the Respondent when they complete the online profile, and is the name that is displayed on the front cover of the report.

- Allow Respondents to view Report Online?

Changing **View Onlin**e to **Yes** will result in an email to the Respondent including a link to view the report online for completed Access Codes.

⚠️When **Include** is set to **No**, EPIC will not use the individual's assessment data to create any reports, so **View Online** should be set to **No.**

- Include this Team Member in the report?

⚠️Excluded Five Behaviors team members with pending Access Codes will still be able to complete their assessments, but their data will not be used in the generated reports until **Include** is changed back to **Yes** for the excluded team member.

When **Include** is set to **No**, EPIC will not use the individual's assessment data to create any reports, so **View Online** should be set to **No**.

- Add Raters / Add Observers

Add new Raters or Observers to a completed **363®** ED 363 or **LPI®** LPI: Next Generation report using the same methods as those to create the initial Access Codes.

- Add or Remove Participants
  - For group and comparison reports, at least one (1) member of the previous group must be retained and included in the new group.
  - EPIC allows two (2) edits to the members/participants of a group report. An edit consists of removal or addition of participants and pressing the **Next** button, regardless of whether you generate/view the report between changes.
  - An **Edits remaining for this report** field is displayed for these records.

- Add Team Members

- ▲Add additional members to an existing Five Behaviors team by editing the existing team and entering additional Respondent information.

- Permanently remove an individual from a Five Behaviors team using the Delete Reports function.

Advanced Options

Change Report Options/Content button

- Options you can modify after choosing the **Change Report Options/Content** button are similar to those you set up during initial Access Code creation. See Select Report Options to review these options.

- When you make changes which do not automatically generate an email to Respondents, and you wish to notify Respondents of updated report options, use the Resend Login Information function to send an updated email to Respondents. The new link will allow Respondents to view any additional changes you have made to the report options.

Use existing data for new Report button

Choose a report from the list and press the **Use existing data for New Report** button. The Respondent is sent a new Access Code and, for related products, will not be required to answer assessment questions that were used in the original report.

Examples of this "upgrade" function:

- Use a completed DiSC 1.0 report to create a new DiSC 2.0 or DiSC 2.0 Plus.

- Use a completed Everything DiSC Workplace Profile to create a new Everything DiSC Work of Leaders; only the Work of Leaders questions will be asked of the Respondent during the assessment.

- **363®** Use an existing, completed Everything DiSC 363 for Leaders report to create a NEW EverythingDiSC 363 for Leaders report, and you'll be able to assign all new Raters for a Leader, but the Leader responses will be carried forward to the new report. The Leader will not be required to retake their online assessment.

⊕**Saver** Use the Batch Function Use Existing Data for New Report to upgrade a group of reports at one time.

Edit Existing Five Behaviors Reports

Locate the Report You Wish to Edit

From menu **Manage Reports** ▸ **Edit Existing Reports**, locate the Annotated Team Report Access Code, identified by the **Report summary** link in the Participants field as shown below. Press the **Edit** link to edit the team report.

Change Folder or Team Name

Choose or create a folder or subfolder and enter a new team name. Press the **Next** button to save your changes.

Add Team Members

Add additional team members using any of the three tabs: **Enter Individual**, **Import from Exce**l, or **Use Existing Report**.

Edit Individual Team Members

- The Add Team Members section lists the Respondents and includes the status of their report, whether their report can be viewed online and whether they are included when generating reports.

- Click on the **Edit** link for a Respondent, then press the **OK** button to be taken to the page for editing individual Respondent Access Code information and report options.

Team Members					?
Show/Hide Team Members					
Email Address	**Name**	**Status**	**View Report**	**Include**	
epicsub3@inscapepublishing.com	Ben Suezle	Complete	No	No	Edit
epicsub3@inscapepublishing.com	Cole	Complete	No	No	Edit
epicsub2@inscapepublishing.com	Sheila Miller	Complete	No	No	Edit

- Use the **Edit Five Behaviors** button to return to editing the Annotated Team Report once you have completed making edits to an individual.

Edit this Report Again	Edit Five Behaviors
Return to Search Results	Return to Search Criteria

Exclude Team Member from Report

- With the individual team member's information displayed, change **Include** to **No**. Excluded individuals with pending Access Codes will still be able to complete their assessments, but their data will not be used in the team's reports unless Include is changed back to **Yes**.

- When **Include** is set to **No**, EPIC will not use the individual's assessment data to create any reports, so the **View Online** options should be set to **No.**

Remove Team Members

- **Pending Access Codes**: To permanently remove an individual from a Five Behaviors team before the individual has completed their assessment, use the Unassign Access Codes/Reclaim Credits function.

- **Completed Access Codes**: To permanently remove an individual from a Five Behaviors team after their assessment has been completed, use the Delete Reports function.

Edit Existing Five Behaviors Team

Add New Members to an Existing ▲ Five Behaviors Team

1. Go to **Manage Reports ▸ Edit Existing Five Behaviors Team**.

2. Use Search to locate the existing Five Behaviors team that you wish to edit. The Team Name is listed for each record. Press the **Report summary** link for any row to view the team participant list.

3. Select the **Edit** link for the team for which you wish to make changes.

4. **Add Team Members** (▲ The Five Behaviors of a Cohesive Team)

   While creating or editing a The Five Behaviors of a Cohesive Team report, EPIC allows you to add individual Respondents, import Respondents from Excel, and use existing, completed Everything DiSC and Five Behaviors reports.

   The **Use Existing Reports** tab allows you to use Respondents who have completed an Everything DiSC or Five Behaviors profile in your new team. These Respondents will not be asked the Everything DiSC questions portion of the assessment again, and will instead complete only the Five Behaviors team assessment.

To Use Existing Reports:

1. On the **Use Existing Reports** tab, press the **Search** button.

2. Search for completed Everything DiSC and Five Behaviors individual reports.

3. Select the reports for the Respondents you wish to add to the new Five Behaviors team.

4. Press the **Next** button to confirm inclusion of the selected Respondents.

5. To edit a Respondent email address, press the **Edit** link, make your changes, then press the **Save** link to save your changes.

Email Address

✗ | rami.sivula@inscapepublishing.com | Save Cancel

✗ | julie.hansen@inscapepublishing.com | Edit

6. Press **Next** to create the new Access Codes and apply any changes you made.

Exclude Team Members

While editing the **Annotated Team Report** information:

- The Add Team Members section lists the Respondents and includes the status of their report, whether their report can be viewed online and whether they are included when generating reports.

- Click on the **Edit** link for a Respondent, then press the **OK** button to be taken to the page for editing individual Respondent Access Code information and report options.

Team Members					?
Show/Hide Team Members				
Email Address	**Name**	**Status**	**View Report**	**Include**
epicsub3@inscapepublishing.com	Ben Suezle	Complete	No	No	Edit
epicsub3@inscapepublishing.com	Cole	Complete	No	No	Edit
epicsub2@inscapepublishing.com	Sheila Miller	Complete	No	No	Edit

- Use the **Edit Five Behaviors** button to return to editing the Annotated Team Report once you have completed making edits to an individual.

Edit this Report Again	Edit Five Behaviors
Return to Search Results	Return to Search Criteria

While editing an **individual team member's** information:

- With the individual team member's information displayed, change **Include** to **No**. Excluded individuals with pending Access Codes will still be able to complete their assessments, but their data will not be used in the team's reports unless Include is changed back to **Yes**.

- When **Include** is set to **No**, EPIC will not use the individual's assessment data to create any reports, so the **View Online** options should be set to **No.**

Remove Team Members

- **Pending Access Codes**: To permanently remove an individual from a Five Behaviors team before the individual has completed their assessment, use the Unassign Access Codes/Reclaim Credits function.

- **Completed Access Codes**: To permanently remove an individual from a Five Behaviors team after their assessment has been completed, use the Delete Reports function.

View/Print/Email Completed Reports

Each time a report is generated, the most up-to-date information is pulled into the report. Because EPIC does not store individually generated reports, completed reports can be generated for viewing an infinite number of times without credits being charged.

Multi-Respondent reports such as ▲ Five Behaviors, 363® Everything DiSC 363 for Leaders and LPI® LPI: Next Generation have completion requirements that must be met before a report can be generated. (See Multi-Respondent Reports)

Generate and View Multiple Reports ⏱Saver

Use **Batch Functions** ▸ **Generate Reports for Download** to generate reports in the background while you continue working in EPIC or logout of the system.

Generate and View Individual Reports

1. Choose **Manage Reports** ▸ **View/Print/Email Completed Reports**.

2. Use the Search function to locate a report.

3. Press the **Select** link next to the report you wish to generate.

Search Results	Sort by: Assigned Date ⌄	● Ascending ○ Descending	Sort	?
Select	Name: **Garth Knox**	Product: **Everything DiSC**	Assigned: **8/19/2014**	
	Alternate Name: **Garth Knox**	**Management Profile**	Completed: **8/19/2014**	
	Email: **epicsub1@inscapepublishing.com**	Language: **English**	Folder: **ED Management**	
	Access Code: **67Q4ZRQY8W**	Account: **gkrebsbach**	Sub Folder:	
		Last Generated:		

4. Choose Report Features and Content

- Change Report Language: View in U.S. English is available for non-English products. The generated report contains the exact same DiSC scores and basis of feedback.

- Report Version: Full or short reports are available for some products.

- Report Options: Add or remove options that were initially set during report creation.

5. Make a Report Selection: An accompanying report is available for some products; select the **Both** options to generate them at the same time.

6. Press the **Next** button.

- While EPIC is pulling the most recent data into the report for you, the following message appears:

Please wait while your report is generated...
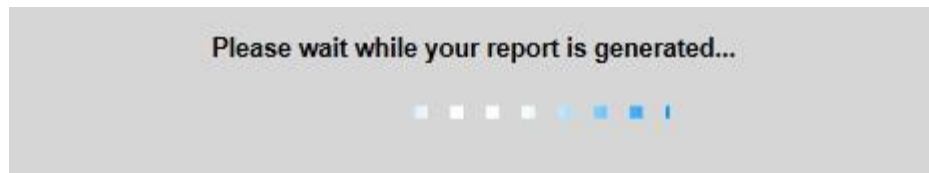
7. Press the **View/Print** button, the **Email** button or the **Save** button.

Manage Reports
View/Print/Email Completed Reports · Report Generated

Your report has been generated. Select one of the Report Options below to View/Email/Save your report.

Everything DiSC Management Profile

View/Print	**View/Print** Select this option to view or print the report.
Email	**Email** Select this option to email the report to one or more email addresses.
Save	**Save** Select this option to download and save the report to your computer.

[Return to Search Results] [Return to Search Criteria]

View/Print Completed Reports

Press the **View/Print** button in Step 7 above to view or print the report as a PDF document.

See Also: *Printing in Greyscale/Black and White*

Email Completed Reports

Press the **Email** button in Step 7 above to have EPIC email the report to recipients of your choosing. You are then presented with a page where you can:

1. Select participants from the report to receive the email (an email address must be entered in EPIC for the participant to be displayed in this list).

2. Add additional report recipients (manually enter email addresses).

3. Add a custom email message to all recipients.

Manage Reports

View/Print/Email Completed Reports • Email Report

Completed reports can be emailed to Report Participants, as well as additional individuals. Use the options below to select email recipients and then click **Send** to email the report.

Email Recipients		
1 Report Participants:	☐ Open the Participant list and select names	
2 Additional Report Recipients:	☐ Add additional Report Recipients	
3 Custom Email:	☐ Add a Custom Email Message	

[Send]   [Cancel]

Save Completed Reports

Press the **Save** button in Step 7 above to save the PDF file to your computer.

Resend Login Information

Use the **Resend Login Information** function to send a reminder to Respondents who have not yet completed their assessment, who have lost their initial message, or for whom you have changed report content. No additional credit charges are incurred.

1. Choose **Manage Reports** ▸ **Resend Login Information**

2. Use the Search function to locate and select the report(s) for which you wish to resend an Access Codes email.

   - Note that the Access Code Status is defaulted to Pending for this search screen; you may change it to completed, but both report types cannot be resent together. This is due to the wide range of uses of the function and allows for custom messaging to be included.

3. Review the confirmation screen and uncheck any reports you do not wish to include.

   - A red circle with a line through it 🚫 will appear for any Access Codes that cannot be viewed online and have no further possible action by the Respondent.

	Stan Kryznski	epicsub1@inscapepublishing.com Discovering Diversity Profile	9/17/2003
	This report cannot be viewed online, and has no	1@inscapepublishing.com Discovering Diversity Profile	9/17/2003
☑	Participant Portal options.	1@inscapepublishing.com Discovering Diversity Profile	9/17/2003
☑	John Grant	epicsub1@inscapepublishing.com Time Mastery Profile	7/30/2003
☑	Kevin Zachary	epicsub1@inscapepublishing.com Time Mastery Profile	7/30/2003
☑	Sam Miller	epicsub1@inscapepublishing.com Time Mastery Profile	7/30/2003
☑	Julie Olson	epicsub1@inscapepublishing.com Time Mastery Profile	7/29/2003
☑	Dennis Davies	epicsub1@inscapepublishing.com Team Dimensions Profile	2/3/2003
☑	Carol More	epicsub1@inscapepublishing.com DiSC Indra	1/31/2003
☑	Anne Pricer	epicsub1@inscapepublishing.com DiSC Indra	1/31/2003
☑	Patrick Fergusson	epicsub1@inscapepublishing.com DiSC Indra	1/29/2003
☑	Paula Prentorio	epicsub1@inscapepublishing.com DiSC Indra	1/29/2003
☑	Cathy Convine	epicsub1@inscapepublishing.com DiSC Indra	1/29/2003

| Resend Login Information | Return to Search Results | Return to Search Criteria |

- For 363® ED 363 and LPI® LPI: Next Generation products, the Raters/Observers will be listed beneath their corresponding Leader in the confirmation screen. Leaders who have completed their assessments will be listed, but not selectable. These Leaders will not receive an email, as no further action is required of them.

- 363® ED 363 Leaders with completed assessments and MyEverythingDiSC.com options will be listed, but unchecked by default. When you select a Leader of this type to be included, the Leader will receive an email informing them of their ability to access MyEverythingDiSC.com.

  ⚠ If you create a custom email message to be sent to Leaders, Leaders with completed assessments and MyEverythingDiSC.com options, who you have selected to receive a reminder email, will also receive your custom message.

4. Press the **Resend Login Information** button.

5. Click **OK** to include a custom email message or change the subject line. Click **Cancel** to bypass.

- 363® ED 363 and LPI® LPI: Next Generation include two separate areas to create different custom messages for both the Leader and the Raters/Observers.

⚠ If you create a custom email message to be sent to Leaders, Leaders with completed assessments and MyEverythingDiSC.com options, whom you have selected to receive a reminder email, will also receive your custom message.

See Also*: Manage Individual Sub Accounts* ▸ *Send Login Information*

Delete Reports

- Deleting a <u>completed</u> report removes the Respondent assessment responses from EPIC, thus the profile can no longer be generated/viewed.

- Deleting <u>pending</u> Access Codes causes the credits to be returned to your account. Note that pending Access Codes can also be unassigned. ***See Also****: Unassign Access Codes/Reclaim Credits*

- 363® ED 363 and LPI® LPI: Next Generation reports include an association between the Raters/Observers and the Leader Access Codes in EPIC. Deleting the Leader Access Codes for one of these products also deletes the associated Rater/Observer Access Codes. ED 363 and LPI: Next Generation reports in pending status will be credited back to your account upon deletion. Conditions for pending status for these reports are:

    - The Leader has not completed the assessment, regardless of whether any Raters/Observers have completed theirs, or

    - The Leader has completed the assessment, but none of the Raters/Observers have completed theirs.

- Deleting an individual Five Behaviors access code removes the team member from the Five Behaviors team and deletes their pending or complete profiles.

- The Annotated Team Report is created automatically when you assign Access Codes for a new Five Behaviors team, and the Annotated Team Report is automatically deleted if/when you delete the Access Codes for all team members. You cannot use the Delete function to delete the Annotated Team Report.

- Deleted reports are also removed from a Respondent's corresponding Participant Portal account.

- ⚠ If you delete an individual report used to create a group or comparison report, the individual is ALSO removed from that group or comparison report in EPIC. Check your edits remaining for these

reports before you delete a required member and render the group or comparison report Access Code unusable.

To Delete a Report

1. Choose **Manage Reports** ▸ **Delete Reports**.

2. Use Search to locate the report you wish to delete.

3. Press the **Delete** link to choose a report.

4. Review your selection and acknowledge any warning messages, then press the **Delete Report** button

5. Press **OK** to continue to delete the code or Cancel to return to step 4.

Message from webpage

? This will permanently delete this report! Click OK to continue.
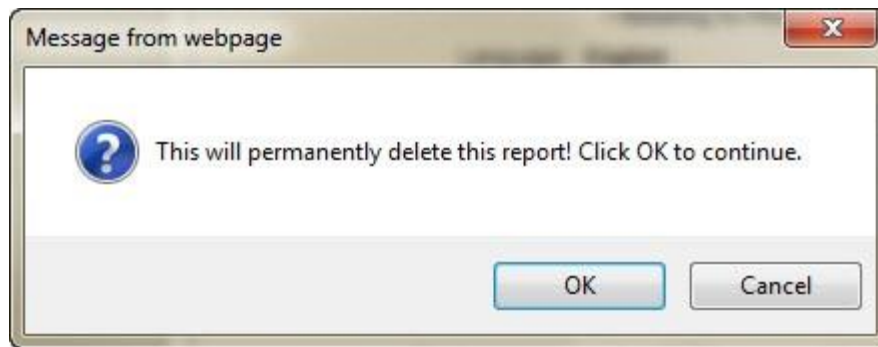
OK   Cancel

6. Press **OK** to send a confirmation email to the Respondent, or click **Cancel** to skip this step.

Message from webpage

? Click OK to send an email confirmation to this Respondent. Click Cancel if you do not wish to send an email notification.
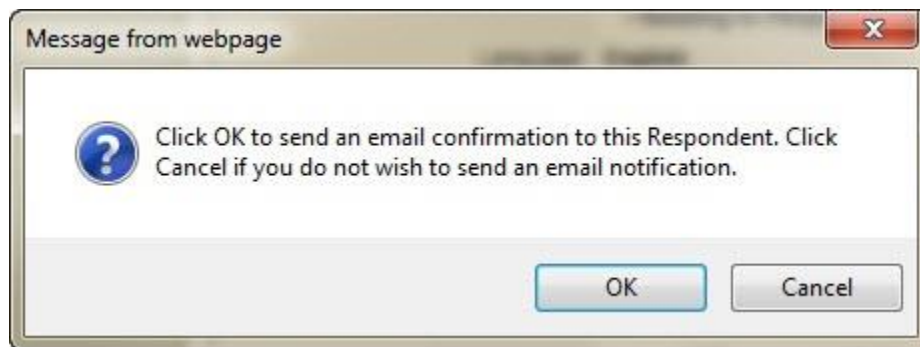
OK   Cancel

7. Press **OK** to include a custom email message or subject line. Press **Cancel** to send the default message.

Message from webpage

? Click OK to include a custom email message or change the subject line. Click Cancel to bypass.

OK   Cancel
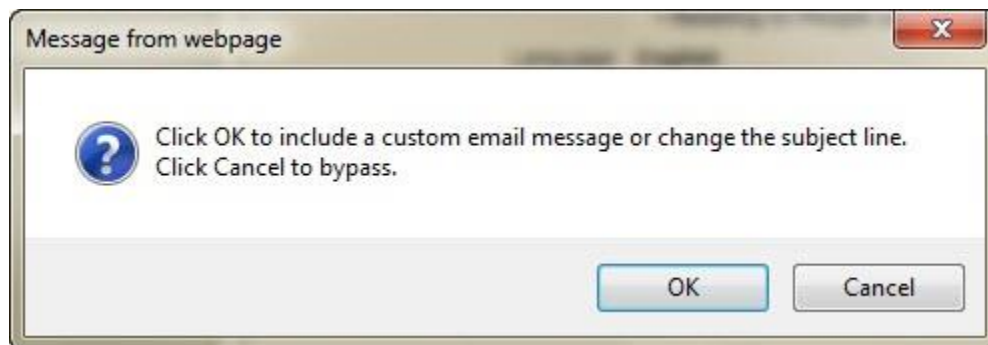
Download Access Code Extract File

Access Code Extract Files allow you to download Access Codes in an Excel spreadsheet for individual EPIC profiles instead of distributing the Access Codes via individual emails to Respondents. Wiley Partner Care must activate this feature before it is displayed during Access Code creation for applicable products.

⚠ It is critical that you, the administrator, maintain the data privacy requirements of the EPIC system and do not assign the same Access Code to more than one (1) individual. Failure to maintain data privacy requirements causes a serious breach of the Data Protection Policy.

Retrieve an Access Code Extract File

To download an extract file at any time, choose **Manage Reports** ▸ **Download Access Code Extract File** and press the **Download File** link.

See Also: *Create an Access Code Extract File*

Download Import Templates

Download Import Templates

![Saver] An import template is an Excel spreadsheet (.xls or .xlsx) you can use to quickly import multiple Respondents or Raters/Observers (available for many EPIC products).

Download a Template

1. Go to **Manage Reports** ▸ **Download Import Templates**

   - The Individual Respondent Template is used for products that allow the Import Respondents feature.
   - The Rater/Observer Template is for creating **363®** ED 363 for Leaders and **LPI®** LPI: Next Generation reports.

2. Press the **Download** button and **Save** the template to your PC.

Enter Respondent Data

Enter your Respondent information in the correct columns on the spreadsheet to populate the template with data.

- ⚠️ Do not change the column headings in row 1.

- Use the columns to the right of column C for your own notes (columns D, E, F, etc.).

- ⚠️ Be careful to (1) enter valid email addresses and (2) leave the last row completely blank, as EPIC will not import incorrect or incomplete information.

- Note the difference between Column C for Individual Respondents and Column C for ED 363 for Leaders and LPI: Next Generation:

  - Individual Respondents require you to enter a "1" or "0" to allow online report viewing by Respondents.

- ED 363 for Leaders/LPI: Next Generation uses Column C to indicate what kind of Rater/Observer you would like to create.

Individual Respondents Template:

	A	B	C
1	Email	Name	View (1=Yes, 0=No)
2	epicsub1@inscapepublishing.com	DeMarcus Roberts	1
3	epicsub2@inscapepublishing.com	Jonas Salk	0
4	epicsub3@inscapepublishing.com	Tiffany Bauchaus	1
5	epicsub4@inscapepublishing.com	Harold Potter	0
6			

Rater/Observer Template:

	A	B	C
1	Email	Name	Rater Relationship: 1 = Manager 2 = Peer 3 = Direct Report 4 = Other
2	epicsub3@inscapepublishing.com	James Crew	2
3	epicsub3@inscapepublishing.com	Jennifer Talbott	2
4	epicsub3@inscapepublishing.com	Tori Thompson	2
5	epicsub3@inscapepublishing.com	Drew Workman	3
6	epicsub3@inscapepublishing.com	Shani Sprenger	3
7	epicsub3@inscapepublishing.com	Denise Lefdahl	3
8	epicsub3@inscapepublishing.com	Monica Lewallen	4
9	epicsub3@inscapepublishing.com	Brit Larson	4
10	epicsub3@inscapepublishing.com	Piper Zeffelmen	4
11	epicsub3@inscapepublishing.com	Dominique McAndrews	1
12	epicsub3@inscapepublishing.com	Nichole Larrabee	1
13			
14			

Use Import Templates to Create Reports

Go to **Manage Reports ▸ Create New Report/Issue Access Codes**

1. Click the **Import Respondents, Import Raters,** or **Import Observers** link to display the File **Browse** and **Upload** buttons.

2. Press the **Browse** button and select the template you have downloaded from EPIC and populated with names and email addresses.

3. Press the **Upload** button to complete the process.

Troubleshoot Failed Import Attempts

Errors result from improperly formatted import templates and an insufficient number of credits to cover all of the imported Respondents. When an error is detected, EPIC abandons the import process and displays an error message.

Manage Reports
Create a New Report/Issue Access Codes • Create a new Report

Error: The import process failed. Please make sure you have selected a properly formatted Excel file.

Manage Reports
Create a New Report/Issue Access Codes • Assign Access Codes

Error: You do not have enough credits to create this report with the imported file.

The following spreadsheet errors will prevent the data from uploading:

- Invalid email address domain (@incorrectEmailAddress.com).

- Improperly formatted data in the spreadsheet such as:

  - Row 1 column headings altered for columns A, B & C (column headings must not be changed).

  - Words in Column C rather than numbers.

  - Last row not completely blank (a partial row of information).

If you receive an import template error message, revise your import template (Excel spreadsheet) and attempt to upload the correctly formatted data.

Use Import Templates to Create Reports

Go to **Manage Reports ▸ Create New Report/Issue Access Codes**

1. Click the **Import Respondents, Import Raters,** or **Import Observers** link to display the File **Browse** and **Upload** buttons.

2. Press the **Browse** button and select the template you have downloaded from EPIC and populated with names and email addresses.

3. Press the **Upload** button to complete the process.

Batch Functions

Batch Functions

Batch Functions allow you to create, edit, or generate a large groups of records at one time.

Edit Report Options

Use this feature to make changes to a group of similar reports. Report Options available to edit will vary depending on which set of records you choose to edit. EPIC sends an email to the Respondent only when an email address has been entered and only when the change results in an available action by the Respondent, such as View Online or added Participant Portal options.

(See More...)

Edit Delivery Options for Access Code Groups

Change a future delivery date or auto reminder date for a group of access codes.

(See More...)

Generate Reports for Download

EPIC will create a .ZIP file for a group of reports you select and notify you via email when your reports are ready to download and print.

(See More...)

Create/Generate Comparison Reports

Use this function to create new Comparison Reports for a group of Respondents with completed Everything DiSC reports.

(See More...)

Manage Existing Download Files

Files created as a result of using the Batch Function to Generate Reports for Download can be managed at this location.

(See More...)

Use Existing Data for New Report Saver

Select a group of similar, completed reports for a set of Respondents and "upgrade" them to a new product.

(See More...)

Batch Edit Report Options

1. Choose **Manage Reports** ▸ **Batch Functions** ▸ **Edit Report Options**

2. Select a Product Family, Product and Language.

3. Press the **Add Reports** button and use Search to locate and select the reports you wish to edit.
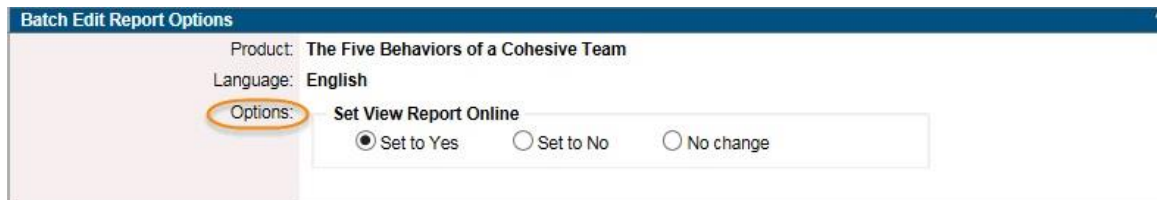
4. Select the options you wish to change.

5. Press the **Update Report Options** button to apply your changes.

6. The View Results page displays all of the reports you selected to edit, and divides them out to show you which were affected by the changes, and also which changes resulted in an email to Respondents.

   • Respondents receive an email when the edits you make benefit them, such as giving them the option to view their completed report online.

Batch Edit Delivery Options for Access Code Groups

1. Go to **Manage Reports ▸ Batch Functions ▸ Edit Delivery Options for Access Code Groups**

2. Press the **Edit** link for the group of reports you wish to edit.

3. Make your desired changes to delivery or reminder date.

4. Press the **Save** button to apply your changes.

Do you need to prevent a set of Access Codes queued for future delivery from ever being sent? Use the Unassign Access Codes/Reclaim Credits function.

Batch Generate Reports for Download

1. Go to **Manage Reports** ▸ **Batch Functions** ▸ **Generate Reports for Download**.

2. Select a Product Family and Product, and use Search to locate and select a set of records (must be a group of like products).

3. Overwrite the default file name if you choose (can help you locate the .ZIP file later).

4. Choose the Report Features and Content you wish to use (varies by product).

5. Select the type of report you wish to create in the Report Options section (varies by product).

Report Options
Select the type of report you would like to create.
○ Everything DiSC Work of Leaders
○ Everything DiSC Supplement for Facilitators
● Both

6. Press the **Next** button.

7. Review the list of reports to be generated, and exclude a report by unchecking the box in the **Include** column. Then press the **Generate Batch** button at the bottom of the page to begin processing the selected reports.

Batch Report Generation   ?

File Name: 20140820_015545.zip

Check All | Uncheck All

Include	Name	Product	Language	Folder	Sub Folder
☑	Donna S. Workplace	Everything DiSC Workplace Profile	English	ED Workplace	
☑	Carl ED Workplace	Everything DiSC Workplace Profile	English	ED Workplace	
☑	English Workplace	Everything DiSC Workplace Profile	English	ED Workplace	

Generate Batch   Return to Search Results   Return to Search Criteria

8. The message below appears letting you know the approximate time this batch of reports will take to generate. Press the **OK** button to continue.

Message from webpage   x

❓ Based on current system usage and the number of profiles in your batch, the estimated time before your batch is available is less than one minute. Click OK to continue.

OK   Cancel
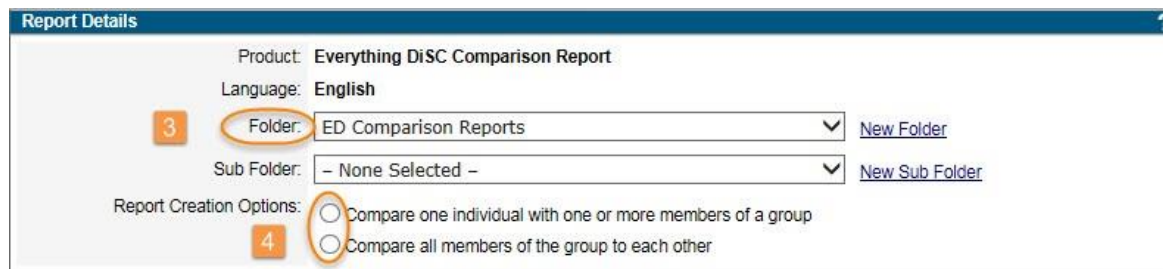
9. The following confirmation message provides a link to the batch download page. At this time you may perform additional functions in EPIC or logout completely, and your reports will continue to generate behind-the-scenes. An email will be sent to the email address associated with your EPIC account when the batch process has completed.

Batch Process Started

The reports you have selected have been queued for generation. When complete you will be notified via email at the following email address(es):

epicsub1@inscapepublishing.com

and a link to download the batch will appear on your EPIC homepage. You can also track the status of the batch generation process by going to the batch download page.
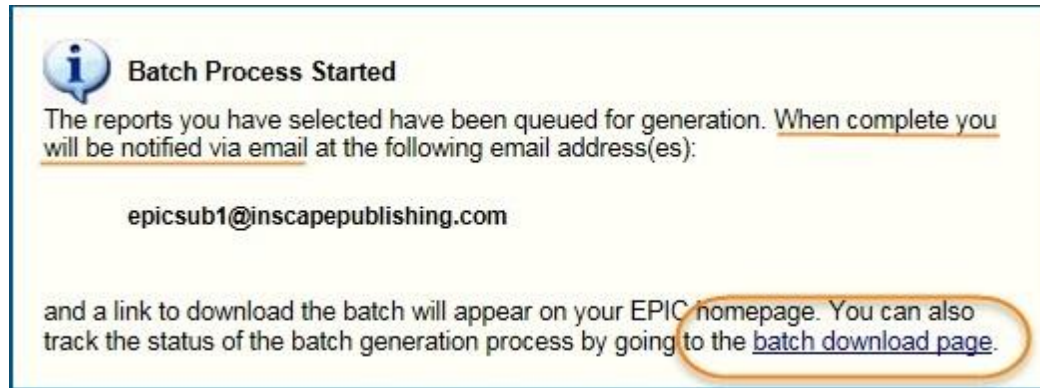
See Also: *Manage Existing Download Files*

Batch Create/Generate Comparison Reports

1. Go to **Manage Reports ▸ Batch Functions ▸ Create/Generate Comparison Reports**.

2. Product Family and Product are pre-selected for you. Select a Language, then press the **Next** button.

3. Select/create a folder in which to have EPIC place the new reports once they are created (Strongly recommended!).

4. Select a **Report Creation Option** from the two (2) listed below:

Step 4 Determines Comparison Pairings:

- Compare one individual with one or more members of a group [One-to-one or One-to-many comparison].

  Use the Participant Set 1 section **Search** button to locate and select the one (1) individual you wish to compare all other selected participants to, then use the Participant Set 2 section to choose all of the other selected participants to compare to the one (1) individual. Press **Next** to continue.

Compare this individual...

Participant Set 1

Click the Search button and select <u>one</u> Participant from the following list of Products:

Everything DiSC Workplace Profile, Everything DiSC Management Profile, Everything DiSC Sales Profile, Everything DiSC Work of Leaders, Everything DiSC 363 for Leaders, The Five Behaviors of a Cohesive Team

Search

...with these individuals

Participant Set 2

Click the Search button and select <u>at least one</u> Participant from the following list of Products:

Everything DiSC Workplace Profile, Everything DiSC Management Profile, Everything DiSC Sales Profile, Everything DiSC Work of Leaders, Everything DiSC 363 for Leaders, The Five Behaviors of a Cohesive Team

Search

- Compare all members of the group to each other [Many-to-many comparison].

   Use the **Search** button to locate the set of participants to compare to one another. Press **Next** to continue.

Compare all of these individuals with each other...

Participants List

Click the Search button and select <u>at least two</u> Participants from the following list of Products:

Everything DiSC Workplace Profile, Everything DiSC Management Profile, Everything DiSC Sales Profile, Everything DiSC Work of Leaders, Everything DiSC 363 for Leaders, The Five Behaviors of a Cohesive Team

Search

5. Once EPIC has completed your pairings (this takes longer for larger groups), review the pairs of reports, uncheck the box for any you wish to omit, then press the **Next** button.

6. EPIC creates the Access Codes for the comparison reports and gives a status of "Success" for those successfully created. Press **Next** to continue.

7. Overwrite the default name for the .ZIP file (optional), and choose whether you want the reports to be in color or optimized for black & white printing. Press **Next** to continue.

8. Review the list of comparison reports to be batch generated, uncheck any you wish to omit, then press **Generate Batch**.

9. A message appears which gives an estimate of the time required for EPIC to generate the reports (varies). Press **OK** to continue.

Message from webpage

Based on current system usage and the number of profiles in your batch, the estimated time before your batch is available is less than one minute. Click OK to continue.

OK   Cancel
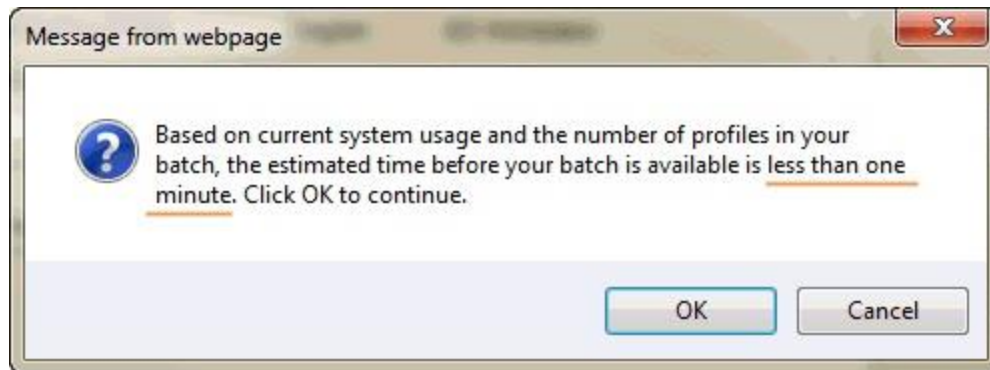
10. A confirmation message provides a link to the batch download page. At this point you may leave this page and continue to use other EPIC functions or log out of the system completely. An email will be sent to the email address associated with your EPIC account when the batch process has completed.

Batch Process Started

The reports you have selected have been queued for generation. When complete you will be notified via email at the following email address(es):

epicsub1@inscapepublishing.com

and a link to download the batch will appear on your EPIC homepage. You can also track the status of the batch generation process by going to the batch download page.
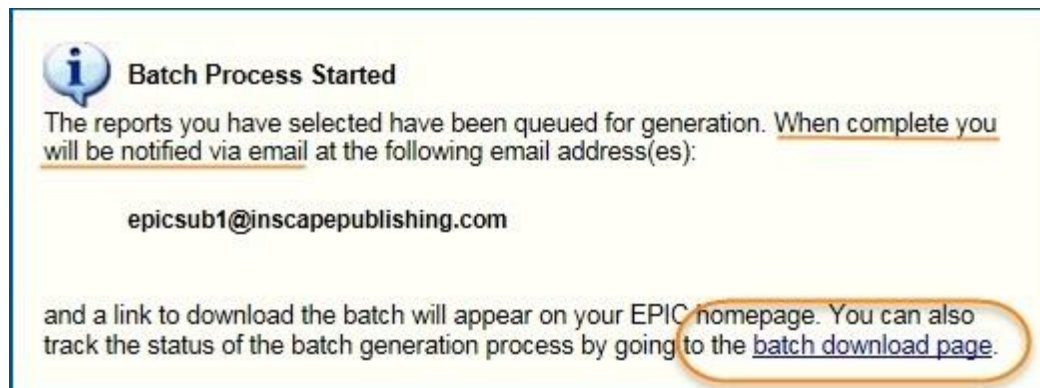
To navigate to your existing batch download files at any time, use the Manage Reports EPIC menu and choose **Batch Functions** ▸ **Manage Existing Download Files**.

Manage Existing Download Files

View Your Batch Download Files

- View your completed, queued, and working download files at **Manage Reports** ▸ **Batch Functions** ▸ **Manage Existing Download Files**.

- Your EPIC home page also displays a message indicating that you have batch files available for download. The message remains on your home page until your files expire or are deleted. Click the provided link to access your files.

Welcome

You currently have 3 Batch Report file(s) available for download. View Batch Report Files here.

File Status

The **File** column contains one of two status indicators during file generation (Queued and Working). Once the file name is displayed, you can click the file name link to download your files.

File	Product	Complete	Expires	Status
20140909_120803.zip	DiSC Classic 1.0 (English)	10(10)	9/16/2014 ✗	
20140909_120815.zip	DiSC Classic 2.0 (English)	10(10)	9/16/2014 ✗	
20140909_120826.zip	DiSC Classic Group Culture Report (English)	4(4)	9/16/2014 ✗	

Once you click on the file name link, the download manager from your Internet browser will provide instructions on saving and opening the file. Since the file is in a compressed format, you will need decompression software on your PC to access the files.

Complete Column

EPIC attempts to generate a report/profile three (3) times. If a report cannot be generated after three (3) attempts, EPIC marks it as failed and continues processing the remaining files in the batch. The **Complete** column indicates the number of successful and failed reports in the batch.

Expires Column

Batch files are retained in EPIC for seven (7) days. EPIC recommends that you save your files to your computer before the expiration date to avoid having to generate the files again after they expire.

Queued Files

The **Status** column indicates an estimate of time, based on the number and size of batch processes currently running in EPIC, before your queued files can be generated. Batch requests are processed in the order in which they are received.

Working...

"Working..." indicates your files are being processed. The progress meter in the **Status** column indicates file generation progress in the system.

See Also: *Batch Functions* ▸ *Generate Reports for Download*

Batch Use Existing Data for New Report

⚠️Note that **Group** and **Team** Reports are not created this way, but are instead created using the Create New Report/Issue Access Code steps. When a group or team report is selected as a product, a section is provided for selecting existing reports to use to create the new group or team report.

- ⏱️**Saver** When you "upgrade" an existing, completed report to a new report, not only is the Respondent's name and email address carried forward, but the Respondent will only be required to answer the product-specific questions for the report and will not have to retake the DiSC Adaptive Testing ("AT") portion of the assessment again. The Respondent's original DiSC AT responses are automatically carried forward to the new report.

- ⏱️**Saver** DiSC Classic products can be upgraded so that Respondent information does not need to be entered into EPIC again; a new assessment will be given to these Respondents.

To Use Existing Data for New Reports

1. Choose the Product Family, Product and Language of the completed profiles you wish to begin with. Enter additional search criteria of your choice, then press the **Search** button.

   - Can't find or choose a report you want to include?

     The following situations can occur during the process and affect whether records can be selected for use. These situations will result in the display of a red circle with a diagonal line through it 🚫 in the Credits column. Placing your cursor over the symbol will provide an explanation for excluding the record.

     - DiSC Classic records that have already been used for upgrade to Everything DiSC can not be used for upgrade to another Everything DiSC Product.

- For reports without an email address in EPIC, you must add a valid email address for all records to be used in the upgrade process using Edit Existing Reports before these reports can be selected in step one (1) above.

- Records that do not have an email address can not be used for profiles that require additional responses or when the view is set to Yes when using DiSC Classic products. The email address will need to be updated using the Edit Existing Reports function before the data can be used in the batch process.

- Everything DiSC profiles that are based on the 79 item responses can only be used once to convert to the same profile using the Adaptive Testing response questions. (e.g. Workplace 79 item response to Workplace Adaptive Testing Items)

2. In the **New Report** section, choose the new product you wish to create. Then press **Next**.

3. Select Report Options for the new set of profiles.

4. Choose a Folder/Subfolder and use the **Yes**/**No** radio buttons to allow the Respondent to view the report online.

5. Remove Respondents from the list of reports to be upgraded by pressing the **X** to the left of their email address.

6. Press **Next**, confirm the credit charges, and then choose to send the default email or include/create a custom email message.

Note: If the report can be immediately generated (e.g. DiSC Classic 1 to DiSC Classic 2) you will be given the opportunity to use the Batch Report Generation option.

Participant Portal Functions

EPIC users with qualifying Everything DiSC products have Participant Portal menu items available. These functions perform similarly to the **Batch Resend Account Information** and **Batch Edit Existing Reports** function, but use preset search criteria to assist users with Participant Portal-specific actions.

Add/Remove Options

Use this function to add or remove Participant Portal options for a group of EverythingDiSC reports.

To begin, go to **Manage Reports** ‣ **Participant Portal Functions** ‣ **Add/Remove Options** and choose an Everything DiSC Product and Language.

1. Use the **Add Reports** button to Search for and select the report(s) for which you wish to change options.

- Note that EPIC remembered which product you selected and that these search criteria are fixed for these fields.

3. Use the radio buttons to select MyEverythingDiSC.com options to set to **Yes** or **No**, then press the **Update Report Options** to apply the changes.

See Also: *Batch Functions* ▸ *Edit Existing Reports*

Resend Account Information

Use this tool to notify Respondents who have an Everything DiSC profile with MyEverythingDiSC.com options added, but who have not yet imported the profile into a MyEverythingDiSC.com account. EPIC search criteria for this function are preset to find this specific set of Everything DiSC profiles.

Go to **Manage Reports** ▸ **Participant Portal Functions** ▸ **Resend Account Information** and use Search to locate and select the profiles for which you wish to resend Access Code emails. Use additional criteria such as **Product** and **Folder** to locate and resend only a certain group of reports.

Your selected profiles are listed for you to review; uncheck the box for any you do not wish to send, then press the **Resend Account Information** button.

See Also: *Manage Reports* ▸ *Resend Login Information*

Managing Your Account

Purchase Credits Online

Primary Accounts can use this feature to immediately add credits to their EPIC account. A $5.00 handling charge is added to each online order.

Go to **Manage Your Account** ▸ **Purchase Credits Online**.

• indicates required field

Purchase Credits Online   **?**

Company Name:	**Nettle Creek Ranch**
Distributor ID:	**7652256**
Credit Balance:	**721**
Account Status:	**Active**
Online Credit Limit:	**1,000**
Credits Currently Available for Purchase:	**1,000**

Number of Credits to Purchase: `5000` • **1**

Confirm Number of Credits to Purchase: `5000` • **2**

Last 4 digits of your credit card: `9999` • **3**

Transaction Description:
(Text entered here is displayed in your
Account History Report)

> Credit purchase for Nettle Creek primary account.
>
> **4**

Comments:
(Text entered here is sent to Inscape
Publishing Customer Service)

> Thank you!
>
> **5**

NOTE: There is a $5.00 handling charge for each online order. Your credit card on file will be charged for the credits purchased. If a billing problem occurs, you will be contacted by Inscape Publishing Customer Service.

Next >> **6**

1. Enter the number of credits you wish to purchase.

2. Confirm the number of credits you wish to purchase by entering the value again.

3. Enter the last four (4) digits of your credit card.

4. Add an optional Transaction Description (text is displayed in your Account History Report for this transaction).

- ⚠️For security purposes, please do not enter credit card information here.

5. Add an optional Comment (this comment is sent to Partner Care).

- ⚠️For security purposes, please do not enter credit card information here.

6. Press **Next**, then **OK** to confirm the purchase. A confirmation page displays summarizing the purchase.

Purchase Credits by Phone

Credits can also be purchased over the phone by calling Wiley Partner Care.

Account History Report

An Account History Report is available, which gives a detailed account of each transaction into and out of your account.

Purchase Credits from Parent Account

This function is available to Sub Accounts when a credit limit has been enabled for the account.

1. Go to **Manage Your Account** ▸ **Purchase Credits from Parent Account**.

2. Choose the EPIC account from which you would like to purchase credits, then press the **Next** button.

Enter the amount of credits you would like to purchase. Click the **Purchase Credits** button to complete the purchase.

● indicates required field

Enter the Number of Credits to Purchase	?
Company:	Nettle Creek Ranch
Credit Limit:	1,000
Credits Available:	759
Enter the Number of Credits to Purchase:	500 ● **3**
Confirm Number of Credits to Purchase:	500 ●
Comments: For security purposes, please do not enter credit card information here.	Purchase Order #: 565874HAS Thank you! **4**

Next >> **5**

3. Enter and verify the number of credits you wish to purchase.

4. Enter an optional message to the Parent Account in the Comments text box.

- ⚠For security purposes, please do not enter credit card information.

5. Press the **Next** button, then confirm the purchase by pressing **OK**.

***See Also**: Process Sub Account Credit Purchases*

Transfer Credits to Parent Account

Sub Accounts have the ability to transfer credits to their Parent Account. This feature is available for all Sub Accounts and does not require activation.

⚠This function does not facilitate a financial transaction; billing and/or payment is not managed by EPIC.

1. Go to **Manage Your Account** ▸ **Transfer Credits to Parent Account**.

2. Select the Parent Account to which you wish to transfer credits, then press the **Next** button.

3. Enter and verify the number of credits to transfer.

4. Enter an optional transaction description; this will appear in the Account History Report for both affected accounts.

   - ⚠For security purposes, please do not enter credit card information.

5. Press the **Next** button, then confirm the transfer by pressing **OK**.

Enter the number of Credits to transfer and click the **Next** button.

Transfer Credits From	
Company Name:	HAS
Account Type:	Sub
Credits Available:	1,868
Account Status:	Active

>>>>

Transfer Credits To	
Company Name:	Nettle Creek Ranch
Account Type:	Primary
Account Status:	Active

● indicates required field

Transfer Details   ?

Number of Credits to Transfer: 325 ● **3**

Confirm Number of Credits to Transfer: 325 ●

Transaction Description:
(Appears in the Account History Report of both accounts)

Return of credits per corrected Purchase Order.

Thank you! **4**

For security purposes, please do not enter credit card information here.

An email will been sent to parent account administrator with a notification of the credit transfer.

Next >> **5**

6. Press **OK** again to create a custom email message, or press **Cancel** to allow EPIC to send the default message.

Unassign Access Codes/Reclaim Credits

Pending Access Codes (those which have been created, but not yet completed by Respondents) can be unassigned, resulting in the credits being returned back to your EPIC account. This includes individual assessments which have been started, but which are not yet complete.

The **Unassign Access Codes/Reclaim Credits** function is also how to reclaim pending credits for Respondents who have declined the Data Protection Consent Policy.

- Due to their multi-Respondent design, **363®** ED 363 for Leaders and **LPI®** LPI: Next Generation Access Codes have specific requirements for a pending status. As soon as the Leader and one Rater/Observer have completed their online assessments, the report is no longer pending and cannot be unassigned.

- ⚠️You can unassign Access Codes for pending individual Five Behaviors team member profiles, even those started by Respondents but not yet completed. Because the Annotated Team Report Access Code consists of data from all of the individual team members, it cannot exist without the individual team members; unassigning all team members deletes the Access Code for the Annotated Team Report.

How To Unassign Access Codes

1. Go to **Manage Your Account ▸ Unassign Access Codes/Reclaim Credits** .

2. Press the **Search** button to return a list of all individual pending Access Codes, or enter search criteria to narrow your results.

- Check the **Data Consent Policy** check box to return a list of Respondents who declined the Data Protection Consent Policy.

3. Select individual Access Codes to unassign and press the **Next** button, or press the **Select All** button to unassign all pending codes returned in the search results.

4. Review the list of Access Codes on the confirmation screen:

A.   Uncheck the **Send a confirmation email**... box if you do not wish to send a confirmation email to Respondents.

- ⚠️Inscape does not recommend removing access to a Respondent profile without notification; it is recommended that you use the confirmation email feature as part of the unassign process.

B.   Use the **Uncheck All** link to deselect all Access Codes in the list.

C.   Check and uncheck individual boxes to select and deselect individual Access Codes.

5. Review any yellow, red or blue shaded rows and uncheck the box for any you wish to exclude:

- Yellow = online assessment has been started by Respondent.

☑	Andy Waffles	The Five Behaviors of a Cohesive Team	English	8/25/2014 5:22 PM	35
☑	Orlando (The Respondent has already begun this profile –	aviors of a Cohesive Team	English	8/25/2014 5:22 PM	35
☑	Lucy Mei unassign with caution!	SC Workplace Profile	English	8/22/2014 12:03 PM	15

- Red = profile is part of an Extract File.

| ☑ | | DiSC Classic 2.0 | English | 7/21/2014 8:48 AM | 10 |
| ☑ | This profile is part of an Extract File – unassign with caution! | | English | 7/21/2014 8:48 AM | 10 |

- Blue = profile has not yet been emailed to Respondent; no email will be sent (profile is part of a future delivery).

Unassign	Name	Product	Language	Assigned	Credits
☑	Janner Pfeifer	Everything DiSC Work of Leaders	English	9/2/2014 3:15 PM	25
☑	This profile has not yet been emailed – no email will be sent	anagement Profile	English	9/2/2014 3:07 PM	25

5. Press the **Unassign Access Codes** button at the bottom of the screen to continue.

Unassign Access Codes

Return to Search Results   Return to Search Criteria

7. Press **OK** to send a custom email message to Respondents, or **Cancel** allow EPIC to send the default email message.

8. The confirmation page displays of summary of Access Codes status and the associated credit transaction:

A. Press the plus sign ⊞ symbol to the left of **Details** to expand the list of affected Access Codes.

B. Total Access Codes unassigned and total credits unassigned values are displayed.

C. 🕐 **Saver** Use the **Return to Search Results** or **Return to Search Criteria** buttons to continue unassigning access codes.

Credits Charged for Reports

Anytime credits are about to be deducted from your account, you will receive a confirmation message asking you to confirm the dedictopm. Credits will never be removed from your account unless you approve the deduction by pressing **OK**:

Each report in the system is assigned a credit value. Credit values assigned to each of the reports can be reviewed at **Manage Your Account** ▸ **Credits Charged for Reports**. Credits are charged when you create reports using the following functions including:

- Entering Tally Box Scores to generate a report (Create a New Report/Issue Access Codes)
- Creating a facilitator or group report (Create a New Report/Issue Access Codes)
- Creating new reports using the **Edit Existing Reports** Advanced Options **Use Existing Data for New Report** button for a selected report
- **Batch Functions** ▸ Use Existing Data for New Report
- Edit Existing Reports: when adding supplemental reports to an existing report
- Creating a new Sub Account

Sub Accounts

Create a New Sub Account

All Distributors are set up in EPIC with Primary Accounts. Primary Accounts have the ability to set up Sub Accounts. Sub Account holders can issue their own Access Codes for online profiles and manage administration of the EPIC platform on their own. Sub Accounts look and function similar to EPIC Primary Accounts, but the Primary Account controls access to products and tools, and can customize EPIC content and product appearance.

Up to five levels of Sub Accounts are allowed underneath each Primary Account. 45 credits are deducted from your account for each Sub Account you create.

How to Create a New Sub Account

Go to **Manage Your Account** ▸ **Sub Accounts** ▸ **Create a New Sub Account**, review the Sub Account overview, and press **Next** to begin.

1. Select the location for the Sub Account in your account structure; the new Sub Account will be created one (1) level underneath the account you select. Press **Next** to continue.

2. Verify the Sub Account hierarchy, then begin to enter the new account information. Required fields are indicated with a red dot ●.

A. **Company Name**: enter the Sub Account's company name
B. **Administrator Name**: this is the "from" name the Sub Account's Respondents see when they receive an Access Codes email from the Sub Account's EPIC account
C. **Site Language**: choose a language from the list
D. **User ID**: the Sub Account uses this **User ID** to log in to EPIC
E. **Email**: emails you send to the Sub Account from within EPIC are sent to the email address you enter here
F. **Initial Credits**: the credit amount you enter will transfer from your EPIC account into the new Sub Account

Once you have entered all of the required (●) information, press **Next** to continue.

3. Select the profiles (products) to be added to the new Sub Account. Press the plus sign ⊞ to the left of a **Product Family** to expand the list, then check the boxes for the products you wish to add to the account. Use the **Show All**/**Hide All** and **Check All**/**Uncheck All** links to view and select many products at one time. Press **Next** to continue.

4. Select Sub Account Settings you wish to turn on or off for the new Sub Account.

- Display your footer information on the Report Cover *(See More...)*
- Display your Custom Home Page Message *(See More...)*
- Display Inscape Publishing Home Page Messages *(See More...)*
- Activate the Graph 1 and 2 option for DiSC Classic reports *(See More...)*

MyEverythingDiSC.com Options: when qualifying Everything DiSC products are selected in step three (3), you are given the opportunity to give the Sub Account the ability to assign any number of MyEverythingDiSC.com options to Respondents.

See Also: MyEverythingDiSC.com

See Sub Account Settings to change settings for an existing Sub Account.

5. Review all fields for accuracy, then press the **Create Sub Account** button. Click **OK** on the confirmation screen to create the account and accept the credit charges, or press **Cancel** and use the **<<Back** button on each screen to make changes.

- Confirmation emails are sent to the parent account's email address on record in EPIC and to the email address you just entered for your new Sub Account. These emails include the Sub Account's EPIC account information and available products. The Sub Account also receives their **User ID** and password.

- ⚠️Verify that the Sub Account received the confirmation email with their EPIC account login information. Contact Wiley Partner Care ASAP to have an incorrect Sub Account email address changed.

Sub Account Settings

Sub Account Settings

On This Page: • Sub Account Report Cover Footer • Inscape Home Page Content • Custom Home Page Content • DiSC Classic Graph 1 and 2 Feature • Comparison Report Groups • MyEverythingDiSC.com Options

Up to six (6) options are available for you to turn on and off for individual Sub Accounts. These options allow you to add your company information to the footer of your Sub Accounts' report covers, to customize what the Sub Account views on their EPIC home page, to turn the Graph 1 and 2 option on or off for the Sub Account's DiSC Classic products, and to control when and how the Sub Accounts can use the MyEverythingDiSC.com Participant Portal.

Sub Account Report Cover Footer

1. Go to **Manage Your Account** ▸ **Sub Accounts** ▸ **Sub Account Settings** and choose **Sub Account Report Cover Footer** from the list.

2. Enter up to five lines of text (each line is limited to 50 characters), then select the Sub Accounts for which you want this footer to appear. Press the **Save Changes** button at the bottom of the page to apply your selections.

3. A confirmation page displays your entered text and a summary of accounts included.

   Footer information page and Sub Account selection:

   Confirmation page: a green check mark ✔ indicates an account will have your custom footer.

Inscape Home Page Content

Inscape posts news, features, upgrades, and system maintenance notices specific to the EPIC application on the home pages of both Primary and Sub Accounts. Messages placed on the home pages of Sub Accounts take into consideration your role as a Distributor; we do not post new product content to Sub Account home pages. Only Primary accounts receive product announcements.

Although we recommend that you leave the home page messages active for all of your Sub Accounts, you are able to turn this feature off. Even with this feature turned off, system maintenance notices will always be displayed to all EPIC users, and be located at the top of the page.

1. Go to **Manage Your Account** ▸ **Sub Accounts** ▸ **Sub Account Settings** and choose **Inscape Home Page Content** from the list.

2. Uncheck the box for Sub Accounts who you do not want to be able to see Inscape Home Page Content, then press the **Save Changes** button at the bottom of the page.

3. A confirmation page displays your Sub Account list with a green check mark ✔ indicating which accounts can still view Inscape Home Page Content.

   Sub Account Deselect Page:

Confirmation page:

Custom Home Page Content

Create your own content to be displayed on the home page of your Sub Accounts.

1. Go to **Manage Your Account** ▸ **Sub Accounts** ▸ **Sub Account Settings** and choose **Custom Home Page Content** from the list.

2. Choose to use text from your Custom Message Library by pressing the **Select text from your Custom Message Library** button.

3. Enter your message in the text area.

⚠The message you enter is displayed exactly as typed on the home page of selected Sub Accounts. The text box does not have a character limit, but keeping messages at a manageable length improves readability.

4. Format your text using the HTML editing tool bar; enable HTML email format in the Email Options section at Personal Options ▸ View/Edit Account Information.

5. Check the box to display your company logo in the top left margin of your message; upload your company logo at View/Edit Account Information. You can also choose to check the box to display your content before Inscape home page content.

☑ Display my company logo
☑ Display my Custom Home Page Content *before* Inscape Home Page Content

A message from Nettle Creek Ranch

I will be holding a **new products seminar** on Frid
Creek Resort. Seminar Reservations can be mad
via my website.

Hope to see you all there!

Alex

6. Check or uncheck boxes to select and deselect Sub Accounts for which you want the custom home page content to appear.

7. Press the **Save Changes** button at the bottom of the page to apply your changes, and review the confirmation page.

DiSC Classic Graph 1 and 2 Feature

Once activated, Sub Accounts have the option to display Graphs 1 and 2 on the Scoring and Data Analysis page displayed at the end of DiSC Classic 1.0, DiSC Classic 2.0, and DiSC Classic 2 Plus profiles.

Name: Respondent Name

Date: 7/18/2007

Graph III

Graph I

These are your "Most" responses for each of the four scales

Graph II

These are your "Least" responses for each of the four scales
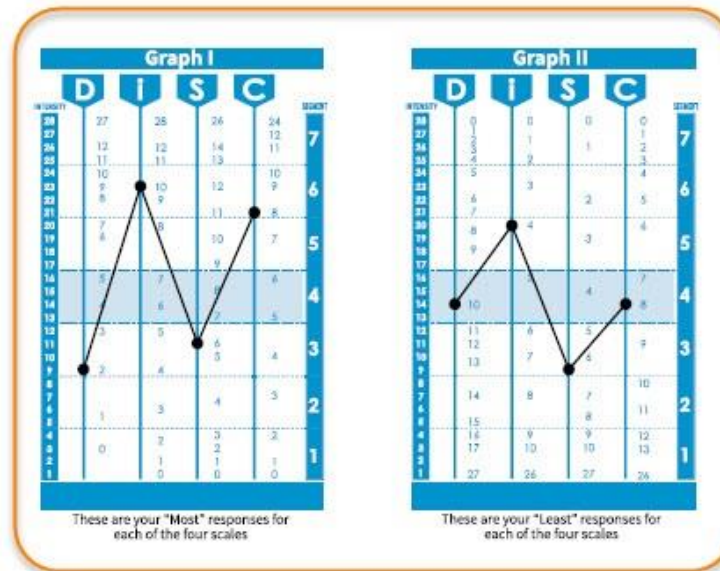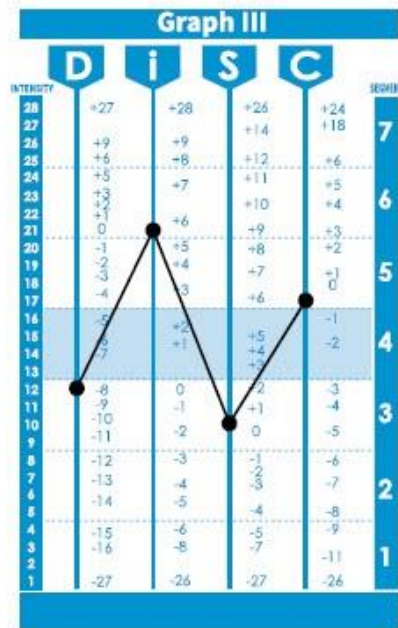
Tally Box		D	I	S	C	N
	Most	2	10	6	8	2
	Least	10	4	6	8	0
	Difference	-8	6	0	0	

SUMMARY OF INTERPRETATION

Highest DiSC Dimension(s): Influence (i)

Classical Pattern: Appraiser Pattern

Segment Numbers: 3635

Respondent Name   **23**

1. Select menu item: **Manage Your Account** ▸ **Sub Accounts** ▸ **Sub Account Settings**, and choose **DiSC Classic Graph 1 and 2 Feature** from the drop-down list.

2. Check and uncheck boxes to add/remove this option for individual Sub Accounts.

3. Press the **Save Changes** button, and a confirmation page will appear. Green check mark symbols ✔ indicate which sub accounts have the Graphs 1 and 2 option, and red X symbols ✖ indicate those who do not have the option. Click on the plus sign next to a sub account to open the accounts beneath it and view these symbols.

Comparison Report Groups

Create relationships between Sub Accounts for purposes of allowing the Sub Account's Respondents the ability to create MyEverythingDiSC.com Comparison Report Invitations with Respondents whose Access Codes were created in your Primary Account and/or in other Sub Accounts.

Create a New Comparison Report Group

1. Go to **Manage Your Account** ▸ **Sub Accounts** ▸ **Sub Account Settings** and choose **Comparison Report Groups** from the list.

2. Press the **New Comparison Report Group** button.

3. Use the check boxes to select Sub Accounts to add to the group, then press the **Save Changes** button to complete the process.

MyEverythingDiSC.com account holders who are Respondents of the accounts you just connected can now send Comparison Report Invitations to one another while this Comparison Report Group exists in EPIC.

Edit or Delete an Existing Group

1. Go to **Manage Your Account** ▸ **Sub Accounts** ▸ **Sub Account Settings** and choose **Comparison Report Groups** from the list.

2. Press the **Edit** link for a group to make changes, then press the **Save Changes** button to apply your changes.

3. Press the **Delete** link to remove the group.

Once a Comparison Report Group has been deleted, MyEverythingDiSC.com account holders will still be able to access and generate their existing Comparison Reports. With the connection between many accounts broken, the Respondents can once again only find the MyEverythingDiSC.com account holders with profiles residing in the exact same EPIC accounts.

MyEverythingDiSC.com Options

This function allows a Primary Account holder to control which Sub Accounts have the ability to provide their Respondents with access to MyEverythingDiSC.com.

1. Go to **Manage Your Account** ▸ **Sub Accounts** ▸ **Sub Account Settings** and choose **MyEverythingDiSC.com Options** from the list.

2. Choose an action: **Add** or **Remove** the options from selected Sub Accounts.

3. Select any number of options to add or remove using the check boxes.

4. Select the Sub Accounts you wish to apply these settings to.

   - Notice that the bullet points beneath each Sub Account list those MyEverythingDiSC.com options that the Sub Accounts already has.

5. Press the **Save Changes** button to apply your changes

Manage Individual Sub Accounts

Manage Individual Sub Accounts

Go to **Manage Your Account** ▸ **Sub Accounts** ▸ **Manage Individual Sub Accounts**, to view a listing of all of your Sub Accounts. Press the plus sign ⊞ to expand an individual row.
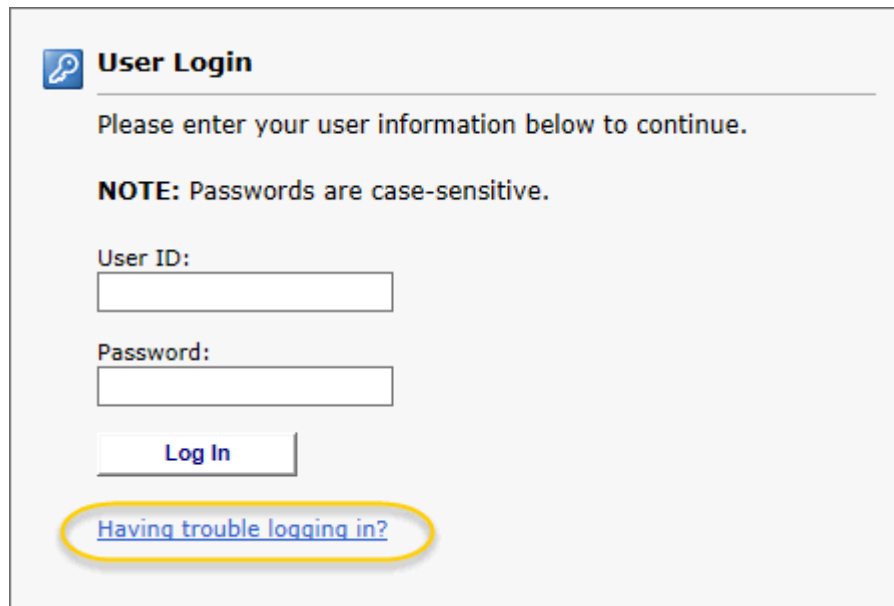
⊘**Saver** Activate the Sub Account Search setting in the Advanced Options section of View/Edit Account Information to use search criteria to find one or more Sub Accounts (the EPIC default is to display them all).

1. Select a Sub Account by pressing the Company Name (Administrator Name) link to the right of the folder icon 📁. Doing so will open up the blue-shaded area which displays the possible functions you can perform for the selected account.

2. Available functions:

- **Send Login Information**: Sends an email containing EPIC login information to the Sub Account administrator (custom messaging available). The email contains the Sub Account's **User ID** and **Password**, along with your contact information.

- **Reset Password**: Makes the password for the account the same as the **User ID** and emails the Sub Account administrator.

  o Sub Account administrators with a unique email address can request this same information on the EPIC login page by selecting the **Having trouble logging in?** link:

- **View Products**: View a list of all products for the selected Sub Account.

- **Add/Remove Products**: Check the corresponding box to add a product/language to the Sub Account, and uncheck the box to remove a product, then press the **Next** button at the bottom of the page to save your changes.

- **Profile Completion Report**: Runs the Sub Account Profile Completion - Summary Report for the selected Sub Account.

- **Transfer Credits**: (1) Enter and confirm the number of credits to transfer out of your EPIC account and into the selected Sub Account, (2) enter an optional transaction description, then (3) press the **Next** button to apply the transfer. An email is sent to the Sub Account with the credit transfer notification.

  - ⚠️This function does not facilitate a financial transaction; billing and/or payment is not managed by EPIC.

  - ⚠️Once credits have been transferred, only the Sub Account can transfer them back to you using the Transfer Credits to Parent Account function.

  - Information entered into the **Transaction Description** field is displayed on the Account History Report of both parties involved in the transaction; the information is not displayed on the transfer credit email note sent to the Sub Account.

- o Your Sub Accounts have the ability to transfer Credits to their Sub Accounts using this same function.

- **Credit Limit**: Enable a credit limit for the selected Sub Account by checking the **Enable Credit Limit** check box. Enter a credit limit and press the **Save** button to apply your changes. No email is sent the Sub Account when you enable or disable this function.

  This function allows Sub Accounts to withdraw credits from your EPIC account for use in their own account.

  - o ⚠️Once a Sub Account has withdrawn credits from your account into their own account, only the Sub Account has the ability to transfer the credits back to your account using the Transfer Credits to Parent Account function.

  - o ⚠️Billing and/or payment is not managed by EPIC.

  - o When this function is enabled, Sub Accounts will have two new menu items available:
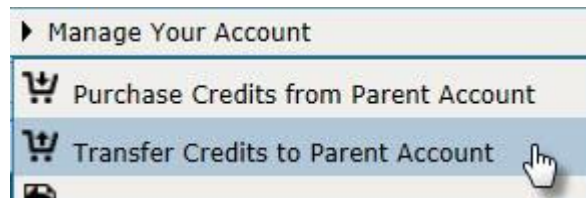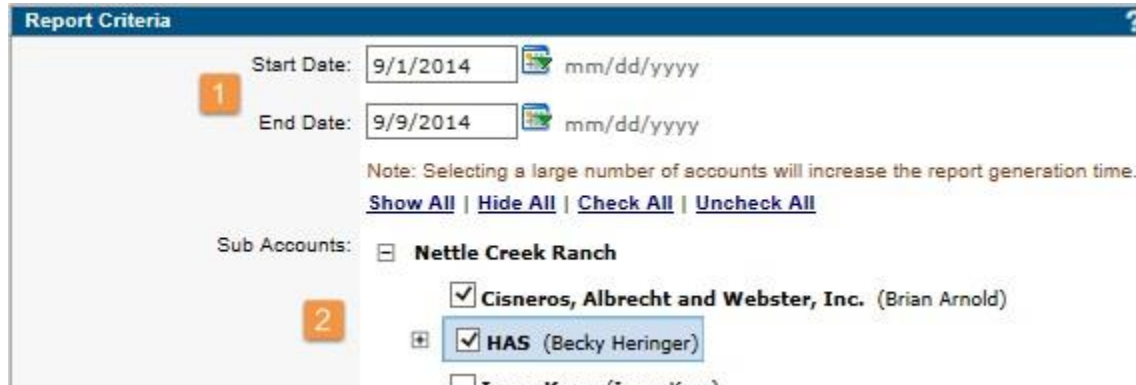
    - **Manage Your Account** ▸ Purchase Credits from Parent Account
    - **Manage Your Account** ▸ Transfer Credits to Parent Account

- **Sub Account Credit Transactions**: Runs the Sub Account Credit Transactions Report for the selected Sub Account.

Sub Account Credit Transactions

Manage Your Account ▸ **Sub Accounts** ▸ **Sub Account Credit Transactions**

1. Choose a date range for the report.

2. Check the box in front of any number of Sub Accounts to select them. Press the plus sign ⊞ to view Sub Accounts that are within other Sub Accounts.

3. Press the **View Report** button once you have chosen a date range and selected Sub Accounts to include in the report.

The Sub Account Credit Transaction Report displays a section for each Sub Account and shows credit activity by date and type, including a credit amount.

See Also: *Sub Account Activity Reports*

Profile Completion - Detail (Sub Accounts)

Manage Your Account ▸ **Sub Accounts** ▸ **Profile Completion - Detail**

1. Choose a date range.

2. Check the box in front of any number of Sub Accounts to select them. Press the plus sign ⊞ to view Sub Accounts that are within Sub Accounts.

3. Press the **View Report** button once you have chosen a date range and selected Sub Accounts to include in the report.

The Sub Account Profile Completion - Detail report lists profiles which were completed within the date range you chose. The report includes a section for each Sub Account, and displays the product type, language, report count, and total credits charged.

See Also: *Sub Account Activity Reports*

Profile Completion - Summary (Sub Accounts)

Manage Your Account ▸ **Sub Accounts** ▸ **Profile Completion - Summary**

1. Choose a date range.

2. To create a report that includes all products and languages, leave the Product, Product Family and Language fields to "None Selected". Narrow your report results by choosing specific products.

3. Check the box in front of any number of Sub Accounts to select them. Press the plus sign ⊞ to view Sub Accounts that are within Sub Accounts.

4. Press the **View Report** button to create the report.

The Sub Account Profile Completion - Summary report lists each Sub Account, the total number of all completed profiles, and the total credits charged for all profiles.

See Also: *Sub Account Activity Reports*

Add Products - Multiple Sub Accounts

Use this function to add products for a group of Sub Accounts. The process for adding products is similar to the process for removing products.

To add products go to **Manage Your Account ▸ Sub Accounts ▸ Add Products - Multiple Sub Accounts**.

1. In the **Sub Account Product List** column, select the product(s) you wish to add to the Sub Accounts. Use the plus symbol ⊞ to expand the list and view/select more products and languages.

2. In the Sub Accounts column, choose the Sub Account(s) for which you would like to add the selected product(s).

3. Press the **Next** button to apply your changes and review the confirmation page. An update and email status is provided.

Added Products
The following products were added:
Show All | Hide All

- Everything DiSC
  - English
    - Everything DiSC Workplace Profile
    - Everything DiSC Management Profile
    - Everything DiSC Sales Profile
    - Everything DiSC Work of Leaders
    - Everything DiSC Work of Leaders Group Report
    - Everything DiSC Work of Leaders Facilitator Report
    - Everything DiSC 363 for Leaders
    - Everything DiSC 363 for Leaders Facilitator Report
    - Everything DiSC 8 Dimensions of Leadership Book Map
    - Everything DiSC Group Culture Report
    - Everything DiSC Facilitator Report
    - Everything DiSC Comparison Report
    - Everything DiSC Team View

The product update was applied to the following Sub Accounts:

Company Name	Status
Cisneros, Albrecht and Webster, Inc.	There was no change needed for this account.
HAS	The Account was updated and email notification sent.

An email is sent to a Sub Account only when the Sub Account's product list has been affected.

See Also: *Add/Remove Products for Individual Sub Accounts.*

Remove Products - Multiple Sub Accounts

Remove products for a group of Sub Accounts at one time. The process for removing products for many Sub Accounts at one time is similar to the process for adding products.

To remove products go to **Manage Your Account** ▸ **Sub Accounts** ▸ **Remove Products - Multiple Sub Accounts**.

1. In the **Sub Account Product List** column, select the product(s) you wish to remove from the Sub Accounts. Use the plus symbol ⊞ to expand the list and view/select more products and languages.

2. In the Sub Accounts column, choose the Sub Account(s) from which you wish to remove the selected product(s).

3. Press the **Next** button to apply your changes and review the confirmation page. An update and email status is provided.

Removed Products

The following products were removed:

Show All | Hide All

- Everything DiSC
  - English
    - Everything DiSC Workplace Profile
    - Everything DiSC Management Profile
    - Everything DiSC Sales Profile
    - Everything DiSC Work of Leaders
    - Everything DiSC Work of Leaders Group Report
    - Everything DiSC Work of Leaders Facilitator Report
    - Everything DiSC 363 for Leaders
    - Everything DiSC 363 for Leaders Facilitator Report
    - Everything DiSC 8 Dimensions of Leadership Book Map
    - Everything DiSC Group Culture Report
    - Everything DiSC Facilitator Report
    - Everything DiSC Comparison Report
    - Everything DiSC Team View

The product update was applied to the following Sub Accounts:

Company Name	Status
Cisneros, Albrecht and Webster, Inc.	The Account was updated and email notification sent.
HAS	There was no change needed for this account.

4. An email is sent to a Sub Account only when the Sub Account's product list has been affected.

See Also: *Add/Remove Products for Individual Sub Accounts*

Move Records to a Sub Account

Completed profiles can be moved to any Sub Account within your hierarchy. Completion status for **363®** ED 363 for Leaders, **LPI®** LPI: Next Generation and ▲ Five Behaviors profiles varies due to the Multi-Respondent design of these products. *(See Multi-Respondent Reports under the Search Results topic.)*

Go to **Manage Your Account** ▸ **Sub Accounts** ▸ **Move Records to a Sub Account** and review the process, then press the **Next** button.

1. Use Search to find and select the completed records you wish to move.

   - From the search results, select records individually and press **Next** to continue, or press **Select All** to select all of your search results.
   - Review the list of selected records and make any necessary changes using the check boxes, then press the **Next** button.

2. Select a Sub Account to which you wish to transfer the selected records. Use the plus sign ⊞ for any row to expand the list if necessary. Press the **Next** button to continue.

3. EPIC has created a folder and subfolder system in which to store the transferred records once they are moved. Rename these folders if you desire, then press then press the **Finish** button.

Step 3
Please review the details below. Click the **Finish** button to complete the transfer, or the **Back** button to make changes.

Review Transfer Details					?
Sub Account:	Cisneros, Albrecht and Webster, Inc.				
Folder:	Records Moved From Nettle Creek Ranch				
Sub Folder:	9/10/2014				

Records to be moved:

Access Code	Name	Product	Language	Assigned
37KP592MM3		Everything DiSC Comparison Report	English	9/9/2014
GV3HA2BT7T		Everything DiSC Comparison Report	English	9/9/2014
X5KYR2SQG5		Everything DiSC Comparison Report	English	9/9/2014
CHK6RWLNMB		Everything DiSC Comparison Report	English	9/9/2014
YT2AM7Q5QF		Everything DiSC Comparison Report	English	9/9/2014
WNZZ5NZ5MP		Everything DiSC Comparison Report	English	9/9/2014
GDGT3QCLW9		Everything DiSC Comparison Report	English	9/9/2014
FLFFDRCME6		Everything DiSC Comparison Report	English	9/9/2014
VTPTJFDR5V		Everything DiSC Comparison Report	English	9/9/2014
6WFWYL838K		Everything DiSC Comparison Report	English	9/9/2014

[<< Back]   [Finish]

See Also: *Records Moved to Sub Accounts Account Activity Report*

Records Moved From a Parent Account

Once the process of moving records to a Sub Account is complete, the Sub Account will see the newly created folder at **Manage Your Account ▸ Folder Maintenance**.

Records moved to a Sub Account can be transferred between the Sub Account's folders using the **Transfer Contents** link. *(See More...)*

⊟ 📁 Records Moved From Nettle Creek Ranch (0)   Rename | Delete | Create Sub Folder
   📁 9/15/2014 (2)   Rename | Delete | Transfer Contents

Process Sub Account Credit Purchases

Sub Account credit purchases awaiting processing can be accessed by selecting the link on your home page or by going to **Manage Your Account** ▸ **Sub Accounts** ▸ **Process Sub Account Credit Purchases**.

This function is available for you to incorporate into your financial transactions process as an order notification.

The **Process Sub Account Credit Purchases** page displays your credit requests. Selecting the **Mark as Paid** link results in a confirmation message. Press the **OK** button to mark the order as paid, or **Cancel** to return back to your pending credit requests.
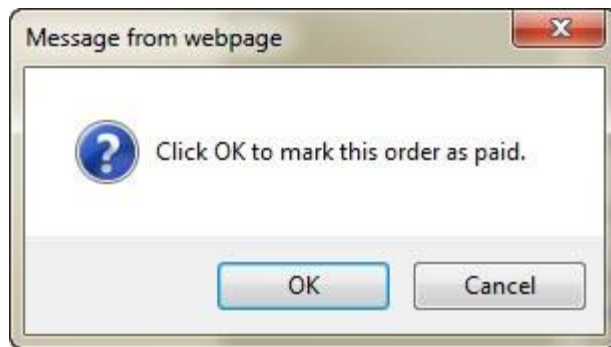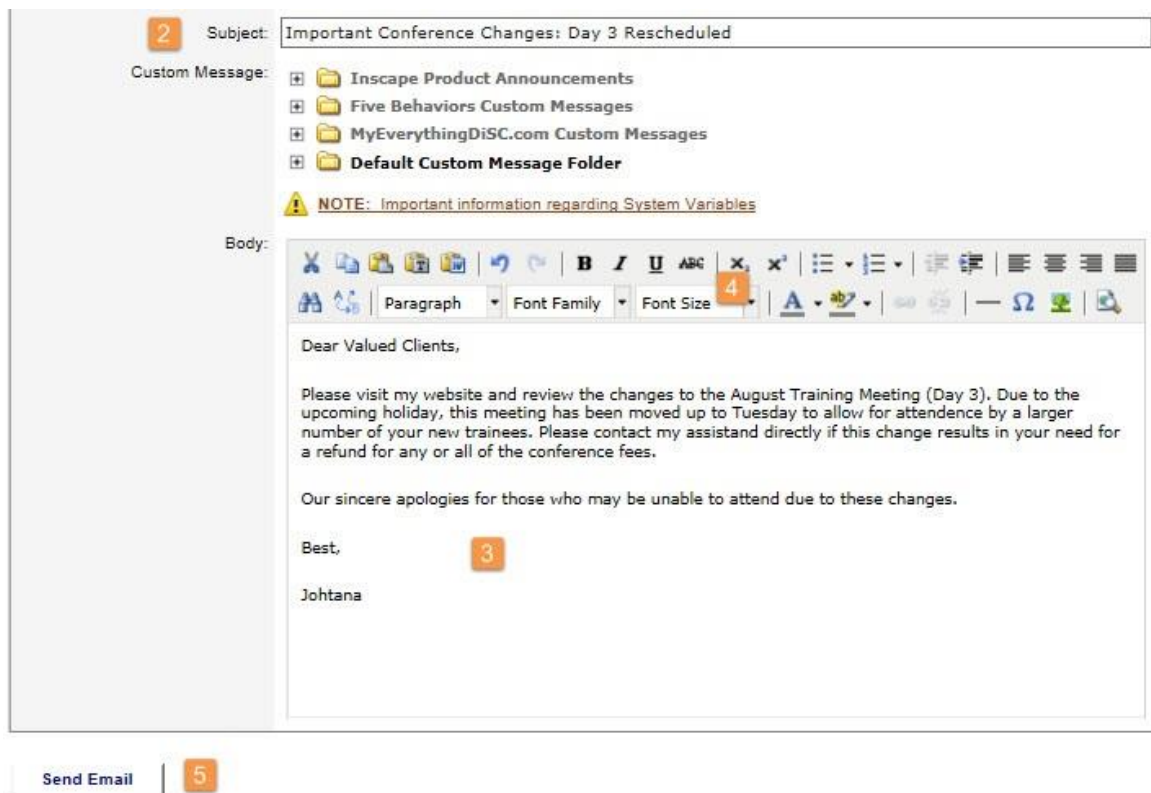
See Also: *Enable Sub Account Credit Limit*

Send Email to Sub Accounts

Select Sub Accounts you wish to be the recipients of the email message, then create and send the message.

Go to **Manage Your Account** ▸ **Sub Accounts** ▸ **Send Email to Sub Accounts**.

1. Select any number of Sub Accounts. Use the plus sign ⊞ for any row to expand the list.

2. Create a subject line.

3. Create a new message, or choose a custom message from your Custom Message Library. ⚠System variables should not be used.

4. Add formatting to your message using the HTML Editor.

5. Press the **Send Email** button to send the text you have entered.

Participant Portal Usage Report (Sub Accounts)

Use this report to view MyEverythingDiSC.com activity by Respondents with Access Codes belonging to your Sub Accounts.

Manage Your Account ▸ Sub Accounts ▸ Participant Portal Usage Report

1. Choose a date range.

2. Check the box in front of any number of Sub Accounts to select them. Press the plus sign ⊞ to view Sub Accounts that are within Sub Accounts.

3. Press the **View Report** button once you have chosen a date range and selected Sub Accounts to include in the report.

The Participant Portal Usage Report displays Sub Accounts for which at least one (1) Access Code has been imported into a MyEverythingDiSC.com account. For each Sub Account listed, the report displays the number of MyEverythingDiSC.com accounts created, and the number of Comparison Reports and Customer Interaction Maps created for the collected group of MyEverythingDiSC.com accounts associated with the Sub Account.

See Also: *Sub Account Activity Reports*

Account Activity Reports

Account Activity Reports

At menu location: **Manage Your Account** ▸ **Account Activity Reports** is a collection of reports on various aspects of your EPIC account, such as credit transactions, profile completion, and Participant Portal usage.

See Also*: Sub Account Activity Reports*

Select a report below to see more:

- **Account History Report**

- **Profile Completion - Detail**

- **Profile Completion - Summary**

- **Pending Credits** Report

- **Unassigned Access Codes**

- **Records Moved to Sub Accounts**

- **363® 363 for Leaders Status Report**

- **LPI® LPI 360 Status Report**

- **Team Status Report**

- **Participant Portal Status Report**

- **Participant Portal Usage Report**

- **Monthly EPIC Credit Activity**

No Records Exist Based on Your Report Criteria

This message is displayed when no activities or reports in your EPIC account meets the search criteria you entered. Broaden your search, when possible, to view more search results.

Message from webpage

⚠ No records exist based on your report criteria.

OK
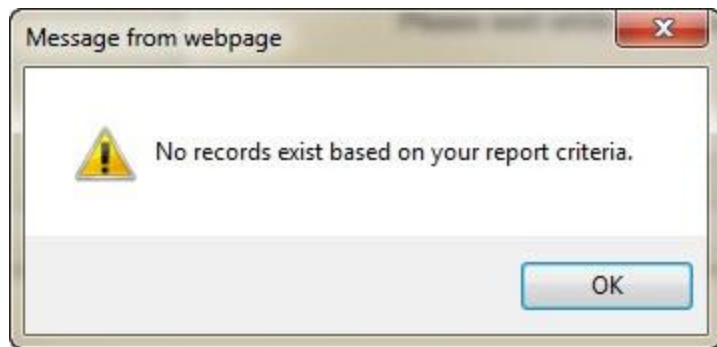
Account History Report

Manage Your Account ▸ **Account Activity Reports** ▸ **Account History**

Enter a date range and press the **View Report** button.

The Account History Report includes information on (1) new Sub Accounts- sorted by date created, including company and administrator name, and (2) Credit Transactions - sorted by date, including transaction type and amount.

- Transaction Types include credits purchased, credits transferred to a Sub Account, and credits transferred from a Sub Account.

Profile Completion - Detail

Manage Your Account ‣ **Account Activity Reports** ‣ **Profile Completion - Detail**

Select a date range and press the **View Report** button. Use the additional report criteria fields to narrow your results.

The Profile Completion - Detail report lists profiles which were completed within the date range you chose. The report includes a section for each product, and displays detailed information on each profile including the Respondent name, date assigned, completion date, View Online setting, and credits charged.

Profile Completion - Summary

Manage Your Account ▸ **Account Activity Reports** ▸ **Profile Completion - Summary**

Select a date range and press the **View Report** button. Use the additional report criteria fields to narrow your results.

The Profile Completion - Summary report lists profiles which were completed within the date range you chose. The report displays a summary on each profile including the product, language, number of reports, and total credits charged.

Pending Credits Report

Manage Your Account ▸ Account Activity Reports ▸ Pending Credits

Press the **View Report** button without entering any report criteria to get a list of all of your pending credits. Use the report criteria fields to narrow your results.

Pending credits are Access Codes that have been issued, but the online assessment is not yet completed. (See Terms & Definitions...)

The Pending Credits report displays your search results by product, and shows the names, email address, date assigned, and pending credits for each individual report.

Unassigned Access Codes

Manage Your Account ‣ **Account Activity Reports** ‣ **Unassigned Access Codes**

Enter a date range and press the **View Report** button.

The Unassigned Access Codes report lists the Access Codes you have unassigned, and displays the name, product, date assigned and date unassigned for each Access Code.

Records Moved to Sub Accounts

Manage Your Account ▸ **Account Activity Reports** ▸ **Records Moved to Sub Accounts**

Enter a date range and press the **View Report** button.

The Records Moved to Sub Accounts report displays all Access Codes you have moved to one of your Sub Accounts. The report lists records by Access Code, and includes the Respondent name, the product and language, date assigned, date completed, the original move date, and the current location (sub account name).

363 for Leaders Status Report

Manage Your Account ▸ **Account Activity Reports** ▸ **363 for Leaders Status Report**

Press the **View Reports** button to view all ED 363 for Leaders Access Codes. Use the additional report criteria fields to narrow your results.

The 363 for Leaders Status Report displays each Leader and the assigned Raters, and includes a profile completion status of pending or complete.

LPI 360 Status Report

Manage Your Account ▸ Account Activity Reports ▸ LPI 360 Status Report

Press the **View Reports** button to view all LPI: Next Generation Access Codes. Use the additional report criteria fields to narrow your results.

The LPI 360 Status Report displays each Leader and the assigned Observers, and includes a profile completion status of pending or complete.

Team Status Report

Manage Your Account ▸ **Account Activity Reports** ▸ **Team Status Report**

Press the **View Reports** button to view all Five Behaviors access codes. Use the additional report criteria fields to narrow your results.

The Team Status Report displays data on each team member, includes a profile completion status of pending or complete, and shows whether the team member is included in report generation.

Participant Portal Status Report

Manage Your Account ▸ **Account Activity Reports** ▸ **Participant Portal Status Report**

Press the **View Report** button to view all Everything DiSC access codes which have at least one (1) MyEverythingDiSC.com option assigned. Choose a folder to narrow your results.

The Participant Portal Status Report includes a **Created** column that indicates if and when the Access Code was imported into a MyEverythingDiSC.com account, and a **Status** column that indicates if the account is Active or Deactivated.

Participant Portal Usage Report

Manage Your Account ▸ **Account Activity Reports** ▸ **Participant Portal Usage Report**

Press the **View Report** button to view all Everything DiSC Access Codes which have been imported into a MyEverythingDiSC.com account, and a summary of Comparison Report and Customer Interaction Map counts associated with the accounts. Use additional search criteria to narrow your search results.

Monthly EPIC Credit Activity

Manage Your Account ▶ **Account Activity Reports** ▶ **Monthly EPIC Credit Activity**

Choose a month from the drop-down list, then press the **View Report** button to view a list of all credit transactions for the month selected.

The Monthly EPIC Credit Activity report lists all transactions sorted by date and includes a description of the activity and the transaction credit amount.

Sub Account Activity Reports

Sub Account Activity Reports

At menu location: **Manage Your Account ▸ Sub Accounts** is a set of activity reports that have to do specifically with Sub Account credit transactions, profile completion and Participant Portal usage.

Select a report below to see more:

- Sub Account Credit Transactions Report
- Profile Completion - Detail Report
- Profile Completion - Summary Report
- Participant Portal Usage Report

No Records Exist Based on Your Report Criteria
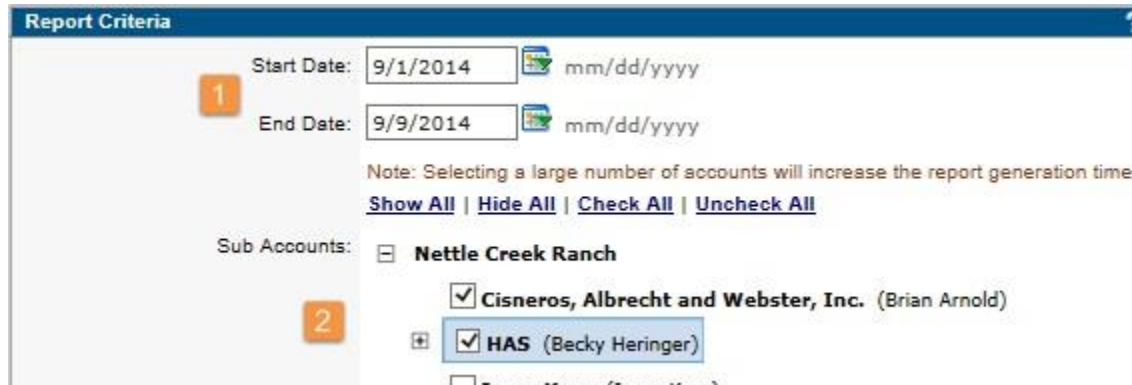
This message is displayed when no activities or reports in the Sub Account meet the search criteria you entered. Broaden your search, when possible, to view more search results.

Sub Account Credit Transactions

Manage Your Account ▸ Sub Accounts ▸ Sub Account Credit Transactions

1. Choose a date range for the report.

2. Check the box in front of any number of Sub Accounts to select them. Press the plus sign ⊞ to view Sub Accounts that are within other Sub Accounts.

3. Press the **View Report** button once you have chosen a date range and selected Sub Accounts to include in the report.

The Sub Account Credit Transaction Report displays a section for each Sub Account and shows credit activity by date and type, including a credit amount.

See Also*: Sub Account Activity Reports*

Profile Completion - Detail (Sub Accounts)

Manage Your Account ▸ Sub Accounts ▸ Profile Completion - Detail

1. Choose a date range.

2. Check the box in front of any number of Sub Accounts to select them. Press the plus sign ⊞ to view Sub Accounts that are within Sub Accounts.

3. Press the **View Report** button once you have chosen a date range and selected Sub Accounts to include in the report.

The Sub Account Profile Completion - Detail report lists profiles which were completed within the date range you chose. The report includes a section for each Sub Account, and displays the product type, language, report count, and total credits charged.

See Also: *Sub Account Activity Reports*

Profile Completion - Summary (Sub Accounts)

Manage Your Account ▸ **Sub Accounts** ▸ **Profile Completion - Summary**

1. Choose a date range.

2. To create a report that includes all products and languages, leave the Product, Product Family and Language fields to "None Selected". Narrow your report results by choosing specific products.

3. Check the box in front of any number of Sub Accounts to select them. Press the plus sign ⊞ to view Sub Accounts that are within Sub Accounts.

4. Press the **View Report** button to create the report.

The Sub Account Profile Completion - Summary report lists each Sub Account, the total number of all completed profiles, and the total credits charged for all profiles.

See Also: *Sub Account Activity Reports*

Participant Portal Usage Report (Sub Accounts)

Use this report to view MyEverythingDiSC.com activity by Respondents with Access Codes belonging to your Sub Accounts.

Manage Your Account ▸ Sub Accounts ▸ Participant Portal Usage Report

1. Choose a date range.

2. Check the box in front of any number of Sub Accounts to select them. Press the plus sign ⊞ to view Sub Accounts that are within Sub Accounts.

3. Press the **View Report** button once you have chosen a date range and selected Sub Accounts to include in the report.

The Participant Portal Usage Report displays Sub Accounts for which at least one (1) Access Code has been imported into a MyEverythingDiSC.com account. For each Sub Account listed, the report displays the number of MyEverythingDiSC.com accounts created, and the number of Comparison Reports and Customer Interaction Maps created for the collected group of MyEverythingDiSC.com accounts associated with the Sub Account.

See Also: *Sub Account Activity Reports*

Folder Maintenance

On This Page:

- Create a New Folder
- Create a Sub Folder
- Rename a Folder
- Delete a Folder
- Transfer Contents
- Find and Organize Unfiled Reports
- Moving a Five Behaviors Report

Organize your records into folders and subfolders to easily locate them using EPIC search functions.

The folder/subfolder structure is displayed in alphabetical order. The number in parenthesis following the folder name indicates the number of records in the folder.

Create a New Folder

Press the **Create New Folder** button. Then enter a folder name and press the **Create Folder** button.

Create a Sub Folder

Press the **Create Sub Folder** link to the right of the parent folder. Your new sub folder will be placed inside of the parent folder. Enter a subfolder name and press the **Create Sub Folder** button.

Rename a Folder

Press the **Rename** link for the folder which you wish to rename. Enter a new folder name, then press the **Rename Folder** button.

Delete a Folder

Delete an empty folder by pressing the **Delete** link, then pressing **OK** to confirm. Since you cannot delete a folder which contains reports, either transfer the contents of the folder to another folder first using the steps below, or use the Delete Reports function to first delete the reports.

Transfer Contents

Move reports between folders and subfolders using the **Transfer Contents** link for the folder in which the reports are presently located.

Check the box for a report in the **Reports to be Moved** column to include it in a transfer. Press the **Check All** and **Uncheck All** link in the **Reports to be Moved** column to select or deselect the entire report set.

Choose a folder or sub folder in the **Destination Folder/Sub Folder** column. To see the sub folders for any single parent folder, press the plus sign ⊞ to the left of the parent folder. Press the **Show All** or **Hide All** to view all sub folders or hide all sub folders.

Press the **Transfer Reports** button to apply the transfer.

Find and Organize Unfiled Reports

At the bottom of the Folder Maintenance page is a **Find and organize unfiled Reports (#)** link. The number in parenthesis is the number of reports in your account which are not currently organized into folders.

Transfer Unfiled Reports into New Folders

First use the Create a New Folder and Create a Sub Folder process to create new folders and subfolders for your unfiled reports. Then press the **Find and organize unfiled Reports (#)** link to be taken to the **Transfer Folder Contents** page.

Check the box for a report in the **Reports to be Moved** column to include it in a transfer. Press the **Check All** and **Uncheck All** link in the **Reports to be Moved** column to select or deselect the entire report set.

Choose a folder or sub folder in the **Destination Folder/Sub Folder** column. To see the sub folders for any single parent folder, press the plus sign ⊞ to the left of the parent folder. Press the **Show All** or **Hide All** to view all sub folders or hide all sub folders.

Transfer Unfiled Reports into Existing Folders

Press the **Find and organize unfiled Reports (#)** link to be taken to the **Transfer Folder Contents** page.

Check the box for a report in the **Reports to be Moved** column to include it in a transfer. Press the **Check All** and **Uncheck All** link in the **Reports to be Moved** column to select or deselect the entire report set.

Choose a folder or sub folder in the **Destination Folder/Sub Folder** column. To see the sub folders for any single parent folder, press the plus sign ⊞ to the left of the parent folder. Press the **Show All** or **Hide All** to view all sub folders or hide all sub folders.

Moving Five Behaviors Reports

The Five Behaviors of a Cohesive Team reports consist of one parent record (the Annotated Team Report) and three or more individual team member reports, which move between folders with the parent record. Move the Annotated Team Report, and the individual team member reports will automatically be moved as well.

Move a Single Record into a Folder or Sub Folder

You can place any single report into a folder or change which folder/subfolder it is organized into using the Edit Existing Reports function.

Personal Options

View/Edit Account Information

The View/Edit Account Information page displays all of your EPIC administrator account information and your default EPIC system settings.

⚠️**Important:** Press the **Save Changes** button after any changes to apply your changes and to be provided with the option to preview your changes in the View Samples section. (See More...)

Your Account Information has been updated.

View Samples		
Sample Report Cover:	View Color	View Black/White
Sample Welcome Page:	View Welcome Page	

- View a sample report cover by pressing the **View Color** or **View Black/White** button.
- View a sample [Respondent Site] welcome page by pressing the **View Welcome Page** button.

Company Information

Company Name:	Required Field. Enter your company name.
Administrator Name:	Required Field. Enter your full name as you wish it to appear to your Respondents. This name is displayed in the default email subject line when assigning online access codes.

Email:	Required Field. EPIC uses this email address to notify you when a process has completed. Add multiple email addresses to this field by separating them with a semi-colon (";").
Email "From" Name:	Optional Field. This name precedes your email address in emails you send via EPIC. A preview of your email address and "From" name is provided in the Email Display field.

Contact Information

- Enter up to seven (7) lines of text. Each line of text is limited to 50 characters. Line #1 is a required field.

- Your Contact Information is displayed in the following locations:

  - The profile report cover
  - The signature block for email messages sent by EPIC to Respondents and Sub Accounts
  - The initial "Splash" page and final "Thank You" page on the Respondents' online assessment website

⚠️**Important:** The information entered into these seven lines of text is displayed exactly as you type it. Please insure that you enter the information correctly.

Menu location: **Personal Options** ▸ **View/Edit Account Information**

Company Logo

Your Company Logo will be displayed on the first page of a Respondent's online assessment and on the front cover of your profiles. Your logo can also be displayed optionally on the home page of your Sub Accounts. Press the **Browse** button to locate and select your logo image file, then press the **Upload Logo** button to upload it to EPIC. Use the **Delete Logo** button to remove it at any time.

- To get the optimal results for your logo, 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

Menu location: **Personal Options ▸ View/Edit Account Information**

Company Website

This URL is displayed to the Respondent upon completion of an online profile with directions to click on the link if they wish to visit the website. If the URL is not entered, only the Contact Information is displayed to the Respondent upon completion.

Menu location: **Personal Options** ▸ **View/Edit Account Information**

Language Options

Set the language used on the EPIC site, as well as the default language for creating products.

Menu location: **Personal Options** ▸ **View/Edit Account Information**

Email Options

Assign Access Code Subject

- Create a Custom Subject for Access Code email to Respondents. Use System Variables to personalize the message.

- Note that you will be able to use the EPIC default subject line and override this custom email subject line during Access Code creation, or make on-the-fly edits later to the custom text you create here.

- ⚠️Only Access Code emails with the default message of, "[ADMIN NAME] has registered you for: [PRODUCT NAME]" will be replaced automatically when you use this setting. Access Code Emails for The Five Behaviors of a Cohesive Team, ED 363 for Leaders, and LPI: Next Generation can be changed by choosing to send a custom subject and email to respondents during Access Code creation. *(See More...)*

Email Format

- Choose to send HTML format emails and have the option to use colorful and accented text, graphics, and links to web pages.

- When you choose to set your account to send HTML messages, the HTML editor will be available to you when you create custom messages.

  Menu location: **Personal Options** ▸ **View/Edit Account Information**

Email Notification

- Receive an email every time a Respondent completes an online assessment by setting your Email Notification to **Yes**. The email is sent to all of the email addresses you have in the Email field for your account.

- The completion notification for **363®** ED 363 and **LPI®** LPI: Next Generation reports will occur only when the Leader and all assigned Raters/Observers have completed their online assessments.

  Menu location: **Personal Options** ▸ **View/Edit Account Information**

Credit Reminder

- The Credit Reminder informs you that your EPIC Credit balance is running low. When the credit balance reaches the number entered into this field, EPIC sends an email reminder to the account administrator that the Credit balance is low. Credits can be purchased by contacting Wiley Partner Care or through the online Credit purchasing option.

- If you have Sub Accounts associated with your EPIC account, you will receive a copy of the email that is sent to the Sub Account administrator when the Sub Account reaches their low Credit reminder.

  Menu location: **Personal Options** ▸ **View/Edit Account Information**

  See Also*: Credits*
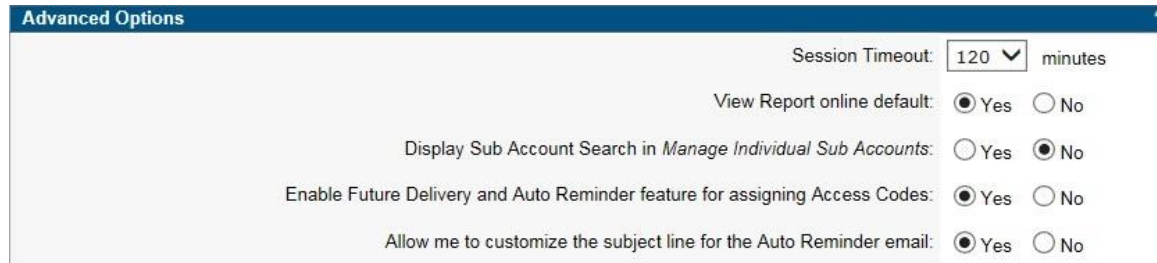
Time Zone Settings

This Required Field allows you to set up a time zone to be used with Future Delivery and Auto Reminder emails.

Menu location: **Personal Options** ▸ **View/Edit Account Information**

Advanced Options

Advanced Options allow you to control EPIC system defaults and settings for your account.

Menu location: **Personal Options** ▸ **View/Edit Account Information**

Session Timeout

As a security feature, EPIC automatically logs you out of the system when no activity is occurring. The default setting is 20 minutes of inactivity, but you can choose to increase this amount up to 120 minutes. A countdown is given in the top right corner of your EPIC account.

View Report online default

Set a default of either **Yes** or **No** to have the **View Report Online** option default to one or the other for Respondents during Access Code creation.

Note that you are able to override this default setting during Access Code creation and to edit and change it at any time thereafter.

Display Sub Account Search in Manage Individual Sub Accounts

- If you have a large number of Sub Accounts, this option allows you to locate an individual sub account by entering a User ID, Administrator Name, Email Address, or Company Name.

- The **Show all Sub Accounts** button on this screen will retrieve the entire sub account list.

See *Manage Individual Sub Accounts* for additional information.

Enable Future Delivery and Auto Reminder

- This feature allows you the ability to delay the delivery of Access Codes and to set up an automatic reminder to Respondents with incomplete assessments.

- When this option is enabled, Access Code creation will include an optional delayed email delivery and/or automatically generated reminder.

- You must set your Time Zone Settings to use this feature.

Allow me to customize the subject line for the Auto Reminder email

Once you've activated the Delivery and Auto Reminder feature, you also have the option to use a Custom Reminder Subject when using the Auto Reminder feature. This allows you to specify a unique email subject line for the Auto Reminder email message.

By default, if you choose not to use a custom reminder subject, the default subject - the same subject initially sent to Respondents - will be used.

⚠️**Important:** Press the **Save Changes** button at the bottom of the page to save any changes you make.

Change User ID/Password

To change your User ID or Password, go to **Personal Options** ▸ **Change User ID/Password**.

In the **Select a function to perform** box, choose to change your Password, your User ID, or both. The page changes to display the correct fields depending on what you choose to change.

Click the **Save** button to update your login information.

Edit Login Information		?
Select a function to perform:	Change my Password only Change my User ID only **Change both my User ID and Password**	
Enter the new User ID:		
Enter your current Password:		

Passwords must be at least **Medium** in strength, and are **case-sensitive**.

Passwords need to be at least 5 characters long, and cannot be the same as your User ID.

To increase the strength of your password you should

- include both lower and upper case letters
- include at least one numeral
- include at least one special character: ! @ # $ % ^ & * ( ) - _
- increase the length beyond the 5 character minimum to 12 or more characters

New Password:	
Strength:	
Confirm New Password:	

Save

Change Your Password

Go to **Personal Options** ▸ **Change User ID/Password**.

Enter a password that meets the required security settings. Press the **Save** button to update your login information.

Your password:

- Must be at least Medium in strength
- Must be at least 5 characters long
- Cannot be the same as your User ID

To increase the strength of your password you should:

- Include both lower and upper case letters
- Include at least one numeral
- Include at least one special character: ! @ # $ % ^ & * ( ) - _
- Increase the length beyond the 5 character minimum to 12 or more characters

Change Your User ID

Go to **Personal Options** ▸ **Change User ID/Password**. Enter a new User ID and your existing Password, then press **Save** to update your account information.

- User IDs in EPIC must be unique; if the User ID you select is already in-use by another EPIC system user, you will need to make another selection.

- Tip: Adding a prefix or suffix to a common User ID (e.g. jsmith01, 1jsmith) will, in most cases, create the unique ID required by the system.

- Your User ID cannot contain blank spaces or use any of the following special symbols: ( ) < > @ , ; : \ " [ ] * / | ?

You can also contact Partner Care for assistance with resetting the password on your accounts. Primary accounts can reset passwords for their Sub Accounts. *See Reset Sub Account Password for more information.*

Manage Custom Messages

Manage Custom Messages

Custom messages can be used in EPIC when:

- Assigning, resending, and unassigning Access Codes
- Transferring credits
- Posting messages on Sub Account home pages (Custom Home Page Content)
- Sending email messages to Sub Account Administrators (Send Email to Sub Accounts)

Your Custom Message Library

Messages are organized into folders. You can create, rename, and delete custom message folders. A single message or groups of messages can also be transferred between folders using the Transfer Contents function.

Go to **Personal Options** ▸ **Manage Custom Messages**:

Create a New Message Folder

Press the **Create a new Message Folder** button to create a new folder. This folder name is available for you to select during functions which include custom email messages.

Create a new Message

Use the **Create a new Message** button to create a new custom message. An option is provided during creation for you to choose the folder in which to store the custom message. *(See More...)*

Manage Existing Message Folders

- Use the **Create a new Message** link to create a new custom message in that particular folder.
- Press the **Rename** link for a folder to edit the folder name.*
- Use the **Delete** link to delete an empty folder.*
- Press the **Transfer Contents** link to move custom messages between folders.
- View the contents of a folder by pressing the ⊞ symbol to its left. **Edit** or **Delete** individual messages by pressing the respective link.

* Folders placed into your account by Wiley Tech Support cannot be deleted or renamed; these are occasionally populated with new custom messages to support product releases.

Create a New Custom Message

To begin, press either the **Create a new Message** button or the **Create a new Message** link for a particular folder. Either way you will be allowed to choose or change the folder location during the new message creation process.

Create a new Message Folder	Create a new Message

Show All | Hide All

⊞ 📁 **Inscape Product Announcements** (25) Create a new Message | Transfer Contents
⊞ 📁 **Five Behaviors Custom Messages** (2) Create a new Message | Transfer Contents
⊞ 📁 **MyEverythingDiSC.com Custom Messages** (2) Create a new Message | Transfer Contents
⊞ 📁 **Default Custom Message Folder** (2) Create a new Message | Rename | Delete | Transfer Contents

1. Give your custom email message a title.

Personal Options
Manage Custom Messages • Create Custom Message

Create Custom Message   **?**

1 Title: Two Weeks Between Access Code Email and Training Session

2 Folder: Default Custom Message Folder

4 EPIC System Variable: – Select a System Variable – | Insert | (i) Where can I use System Variables?

To add an EPIC system variable to the Message, select the variable from the list above, position the cursor where you want the variable to be placed, and then click the **Insert** button.

Message: Type your message below.

5

Good Day, [RESPONDENT NAME], **3**

Below is a link with an access code for your online assessment for [PRODUCT NAME].

Your workgroup's training session is scheduled to begin in just 2 weeks. **Please take 15-20 minutes to completed your assessment before next Tuesday.** Use the link below to access your online assessment and begin.

We look forward to meeting you - thank you and enjoy your day!

[ADMIN NAME]

[ADMIN COMPANY NAME]

6 Save   Cancel

2. Select a folder in which to store the new message (if the correct folder is not already chosen).
3. In the text editing area, enter the text you want to include in your message.
4. Use System Variables to add dynamic fields to your messages, allowing them to be used for various Respondents and products.
5. Use the HTML editor toolbar to add style to your text, images such as your company logo, or hyperlinks to websites you wish to include.
6. Press the **Save** button to complete the process.

Test Your Custom Messages Before Use

To test your messages before using them, create an Access Code and send it to yourself using your new custom message to verify the layout of the message. Once you have received and reviewed your message, Unassign the Access Code to reclaim the credits. (See Use a Custom Email Message)

System Variables (Dynamic Fields)

Personalize your custom email messages using the six (6) EPIC System Variables. Before the email is sent, EPIC replaces the field placeholder with the Respondent Name, Leader Name, Access Code, Your Name, Your Company's Name, or the Product Name.

To use a System Variable, select one from the list, position your cursor where you want it to be placed within the text box, then press the **Insert** button.
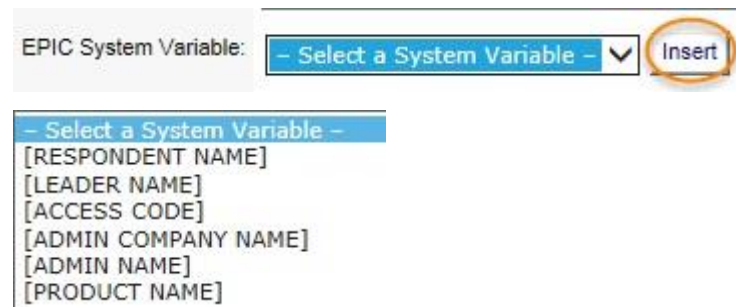
HTML Editor

The HTML editor toolbar is available when your email format is set to HTML in the **Email Options** section at Personal Options ▸ View/Edit Account Information. Add text formatting, graphics and hyperlinks using these HTML editor tools.

Custom Messages to Sub Accounts

When Wiley (formerly "Inscape") creates product announcement messages and loads them into your EPIC account, they are stored in the Inscape Product Announcement folder. This folder is only available on

Primary accounts. The messages within this folder can be customized and sent to your Sub Account for new product notifications as an email, or posted on Sub Account home pages using the Custom Home Page Content feature.

Create a Custom Subject Line

Create/edit your own custom subject line at **Personal Options ▸ View/Edit Account Information**. This custom subject line becomes the default subject line, and will be sent when you choose to send the default email message. Override this custom subject line at any time by choosing to send a custom email message and editing your custom subject line. (See Use a Custom Email Message)

Use a Custom Email Message

When a function in EPIC allows for the use of a custom email message, the following prompt will display. Press the **OK** button to use a custom message, or press **Cancel** to allow EPIC to send the default message and subject line.
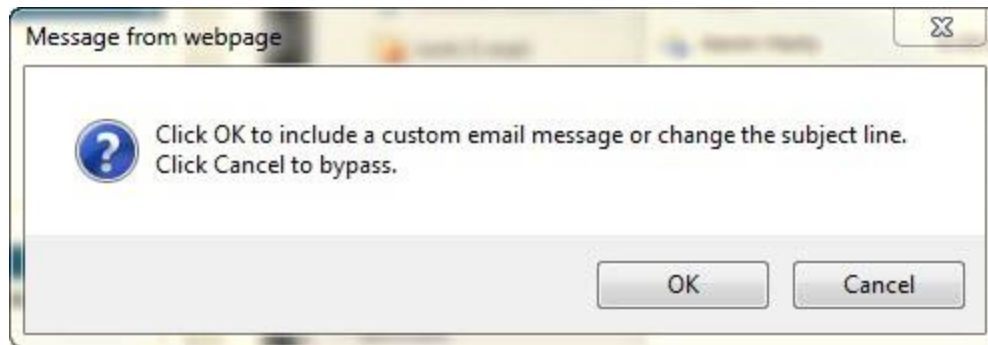
See Also: *Custom Messages for Multi-Respondent Reports*

There are four (4) ways in which you can customize the subject and body text of the email.

1. **Default Email Subject and Default Text**: Select the radio button for **Default Subject** and leave the body text area blank, and EPIC will send the default email to Respondents.

2. **Default Email Subject and Custom Text**: Select the radio button for **Default Subject**, and choose or create custom message text.
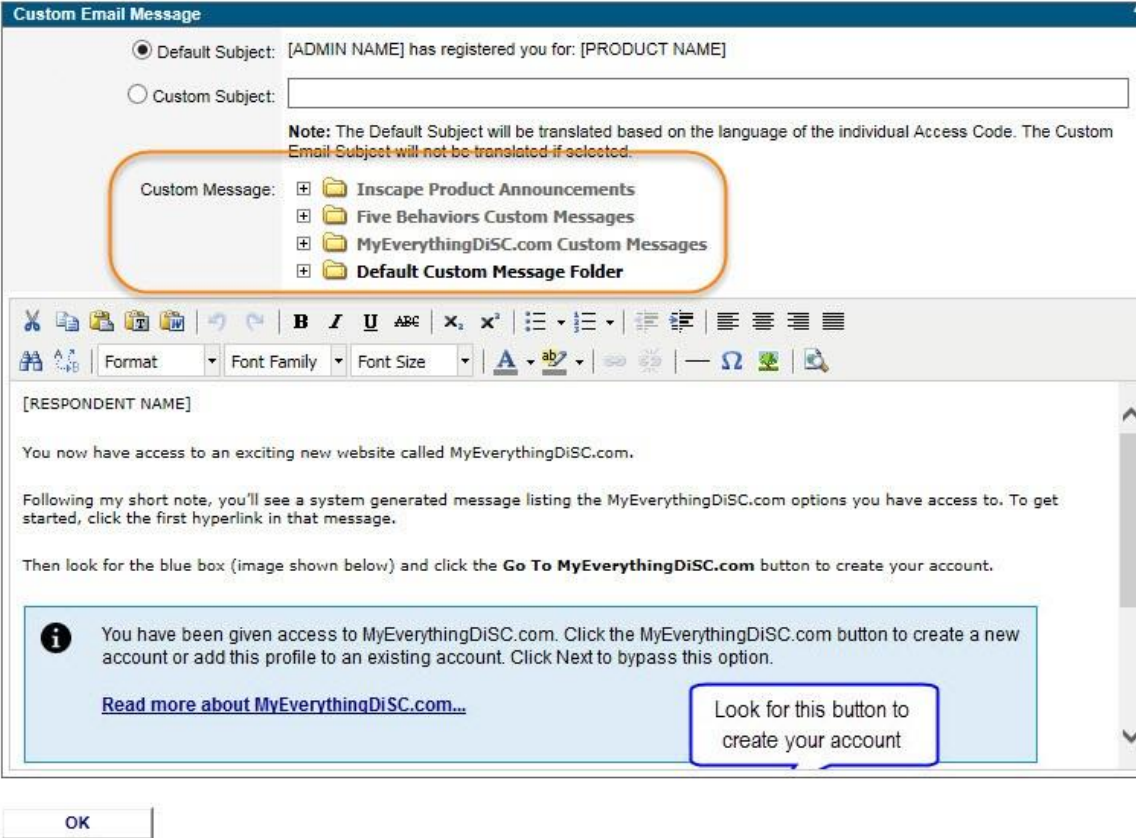
3. **Custom Email Subject and Default Text**: Use your existing custom subject or edit it to create a new one. Leave the body text area blank, and EPIC will send the default body text for the product and function with which you are working.

4. **Custom Email Subject and Custom Text**: Use your existing custom subject or edit it to create a new one, and choose or create custom message text.

Use a Custom Message From Your Library

Press the plus sign ⊞ symbol to the left a folder to display the folder contents, then select a custom message. Your custom message text will populate the body text area, at which time you can make any number of edits before you press the **OK** button to send the message.

363® ED 363 for Leaders and LPI® LPI: Next Generation products feature separate custom messages for the Leader and the Observers/Raters. Separate email subject and body text areas are available for each type of Respondent. (See More...)

Create and Use an "On-the-fly" Custom Email Message

- Simply add and edit text in the text box area to create a one-time unique email message.

- 363® ED 363 for Leaders and LPI® LPI: Next Generation products feature separate custom messages for the Leader and the Observers/Raters. Separate email subject and body text areas are available for each type of Respondent. (See More...)

Manage Report Tailoring

Available for eligible products, product tailoring allows you to customize a report title, report page order, and the inclusion/exclusion of pages.

Create a New Tailored Report

Go to **Personal Options** ▸ **Manage Report Tailoring** and press the **Create a New Tailored Report** button.

1. Select a **Product Family**, **Product**, and **Language**. Enter a **File Name** (this **File Name** appears in EPIC drop-down lists for your tailored reports).

2. Use the default program name, or enter a custom program name (appears on report cover).

3. Add an optional description (used for managing your custom tailoring only - does not appear on report cover).

- View a sample report cover by clicking the **Color Report Cover** link.

4. Using your cursor, select a page to move or delete, then select the action to apply to the selected page.

⚠️Moving and deleting pages is limited in report tailoring. EPIC displays an informative message when an action cannot be performed.

5. Select a Section to move, then select **Move Up** or **Move Down**

⚠️Moving sections is not available for all products. For available products, section moves are not available for all sections of the report. EPIC displays an informative message when an action cannot be performed.

6. Press the **Save** button to save your tailored report.
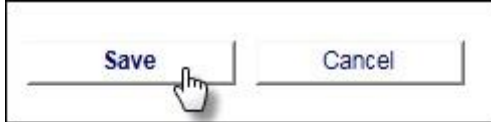
Edit a Tailored Report

1. Select the **Edit** link for the report you wish to edit.

2. Make your changes, then press the **Save** button to save your changes.

Tip: Use the **Reset Pages** link to undo your prior tailoring and apply new/different tailoring.

Delete a Tailored Report

1. Select the **Delete** link for the report you wish to delete.

2. Confirm deletion by pressing the **OK** button.

3. When you delete a tailored report that is currently applied to your Access Codes/reports, a warning message displays. Click **OK** to continue to delete the tailored report and to allow EPIC to revert the affected reports to their default pages.

Apply Product Tailoring to Reports/Access Codes

Product tailoring can be applied or removed for a report at any time:

- **Edit Existing Reports:** Use the Advanced Options **Change Report Options/Content** button to apply or remove product tailoring for a selected report.

- **Batch Functions** ▸ **Edit Report Options**: Apply or remove product tailoring for a selection of reports.

- **View/Print/Email Completed Reports**: apply or remove product tailoring for a selected report before you view/print it.

- **Batch Functions** ▸ **Generate Reports for Download**: apply or remove product tailoring for a selection of reports before you generate them for download.

Create Sample Reports

Use this function to create personalized samples of the profiles in your EPIC account. You can produce a sample report that is personalized with your company logo and contact information, and choose to include or omit report sections, when available.

Go to **Personal Options** ‣ **Create Sample Reports** and choose the **Product Family**, **Product** and **Language** of the report you wish to generate. EPIC generates a PDF version of the report that can be printed, emailed or saved.

View Sample Email Templates

EPIC automatically sends the default email message to Respondents for actions such as report creation, report deletion and changes to report options. Messages that EPIC send to Sub Accounts when you alter their account can also be customized, so a default version of these is available for viewing as well.

See Manage Custom Messages to create and edit custom emails to send in lieu of the default EPIC emails. Also see View/Edit Account Information to change whether a plain text or HTML email is sent.

To View Sample Email Templates

1. View default email messages at **Personal Options ▸ View Sample Email Templates**

2. Select an Email Type:

- Choose **Access Code Related** to view messages sent to Respondents.

- Choose **Account Related** to view messages to Sub Accounts.

3. Select an Email Template and Language to view.

The email message template is displayed with variable fields <mark>highlighted in yellow</mark>. These populate with dynamic text such as [RESPONDENT NAME] when the email message is created in EPIC.

View Sample Email Templates   ?

Email Type:	Access Code Related ⌄
Email Template:	Declined Data Privacy Consent ⌄
Language:	English ⌄

Sample Email

To:	respondent@example.com
From:	Generic Training Administrator<gkrebsbach@inscape-epic.com>
Subject:	Data Protection Consent Notification

[ADMIN COMMENTS]

The following individual did not accept the terms of the Data Protection Consent Policy:

Name: **[RESPONDENT NAME]**

This individual will not be allowed to complete the **[PRODUCT NAME]** (**[PRODUCT LANGUAGE NAME]**) report without accepting the terms of the Data Protection Consent Policy.

You should take one of the following actions:

1. Contact the individual and notify them that they need to read and accept the terms of the Data Protection Consent Policy before they can complete the profile. They can change their choice by clicking on the access code link in the original assign access code email message that you sent them and clicking Accept on the Data Protection Consent Form.

Or

2. Use your EPIC administrator account to reclaim the access code and add the credits back to your account. This function is available in

Manage Your Account >> Unassign Access Codes/Reclaim Credits

Home Page

Your EPIC Home page provides quick links to your pending Sub Account credit purchases, to your available Batch Report Files, and to news and announcements about the EPIC system.

Primary Accounts receive new product announcements via the EPIC home page, and can both choose to allow/disallow Sub Accounts to view these messages and also create custom home page content for their Sub Accounts.

View credit purchases here and **View Batch Report Files here** are links which take you directly into the functions to Process Sub Account Credit Purchases and to Manage Existing Download Files. These links are only available when pending purchases and batch files exist.

For older EPIC accounts, a **View Archives** link is available, which allows you to view past news releases.

MyEverythingDiSC.com

All Primary Account holders and those Sub Account holders who have been given MyEverythingDiSC.com options, have the ability to give MyEverythingDiSC.com options to a Respondent with a qualifying Everything DiSC profile (ED Workplace, ED Management, ED Sales, ED Work of Leaders and ED 363 for Leaders). The interactive MyEverythingDiSC.com site allows participants to:

- Invite colleagues to create Everything DiSC Comparison Reports
- Learn more about DiSC and their personal DiSC style
- Create Customer Interaction Maps (for Everything DiSC Sales Profiles)

Two Help Resources for Respondents

- Go to MyEverythingDiSC.com, press the **Don't have an account?** link on the login page, then press the **How do I create a MyEverythingDiSC.com account?** link to watch a short instructional video.

- While logged in to a MyEverythingDiSC.com account, press the Help link ❓ at any time for help on using the MyEverythingDiSC.com website.

MyEverythingDiSC.com Options for Access Codes

- MyEverythingDiSC.com access can be assigned to a report both while assigning Access Codes and any time afterward, by editing individual reports or giving the options to many reports at one time using the **Participant Portal ▸ Add/Remove Options** function outlined below. A completed profile

can only be uploaded into an activated MyEverythingDiSC.com account when it has at least one (1) MyEverythingDiSC.com option assigned.

- Respondents CAN import a completed profile and use the MyEverythingDiSC.com features even when **View Online** is set to **No**.

- ⚠ 363® Giving just one MyEverythingDiSC.com option to the Leaders profile, will allow the Leader to be able to view their profile inside of MyEverythingDiSC.com, as long as their report meets the completion requirements for report generation.

Turn on MyEverythingDiSC.com Options for New Profiles

When creating a new EverythingDiSC profile, choose which options to make available to your Respondents by checking one (1) or more of the boxes in the **MyEverythingDiSC.com** options section:

- You can still set **View Online** to **No** for profiles with MyEverythingDiSC.com options. Respondents CAN import a completed profile and use the MyEverythingDiSC.com features even when **View Online** is set to **No**.

- ⚠ 363® Giving just one MyEverythingDiSC.com option to the Leaders profile, will allow the Leader to be able to view their profile inside of MyEverythingDiSC.com, as long as their report meets the completion requirements for report generation.

- The Access Code email sent to your Respondents will include a summary of MyEverythingDiSC.com options along with the link to their online assessment.

This Email contains an Access Code for: **Everything DiSC Work of Leaders**

To begin responding, please click on the link below:

https://www.inscape-epic.com/default.aspx?ac=8VGEZ2QMGD

IMPORTANT: This is your personal Access Code. Do not share this note or the Access Code with anyone unless you want them to have access to your Report.

Your Everything DiSC Work of Leaders has also been given access to the MyEverythingDiSC.com site. You will be able to access MyEverythingDiSC.com once you complete the assessment.

You now have access to the following options:
   Tell Me More About My Style
   Tell Me More About DiSC
   Everything DiSC Comparison Reports

If you are having problems with the link, you can access the profile by entering the site address: https://www.inscape-epic.com and supplying the following personalized Access Code:

- The last page of the online assessment will include a link to MyEverythingDiSC.com, where the Respondents can create an account and import their completed profiles.

Edit MyEverythingDiSC.com Options for Existing Profiles

Add/Remove MyEverythingDiSC.com Options for One Access Code/Profile

Go to **Edit Existing Reports** and select a profile to edit. Once the edit page is open for the report, press the **Change Report Options/Content** button in the **Advanced Options** section near the bottom of the page to access the MyEverythingDiSC.com options.

Add/Remove MyEverythingDiSC.com Options for Many Profiles

Use menu location **Participant Portal Options** ▸ **Add/Remove Options**, and select an Everything DiSC product.

1. Press the **Add Reports** button and select the reports for which you wish to change options (repeat this step to select additional reports).

2. The **Report List** section displays the selected reports and the current **View Online** and MyEverythingDiSC.com options assigned to them. Review the list of added reports and delete any by selecting the "X" to the left of the email address.

3. Add MyEverythingDiSC.com options by selecting the radio button in the **Yes** column; remove options by selecting the radio button in the **No** column. The default option is **No Change**.

4. Apply or remove product tailoring for the selected reports or default to **No Change**.

5. Set **View Report Online** to **Yes** or **No** or default to **No Change**.

6. ⚠To apply your selected changes, press the **Update Report Options** button.

7. Press **OK** to include a custom email message, or **Cancel** to send the default message.

   - Two Custom MyEverythingDiSC.com email messages are available for you to include when you press **OK**; select one from the MyEverythingDiSC.com Custom Messages folder, or use your own custom message:

8. Once your changes are applied, the Results screen will display a summary of changes made, including whether or not an email was sent to the individual (**emails are sent when report options are added, but not when they are removed**).

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

Manage Reports
Batch Functions • Edit Report Options • Results

Below are the results of your Batch Edit operation.

Batch Edit Product Details   ?

Product:	Everything DiSC Sales Profile
Language:	English

Report List
Updated Reports

Email	Name	View Online	My Style	About DiSC	Customer Interaction Maps	Comparison Site	Tailoring	Email Sent
rwalbon@inscapepublishing.com	Elvis i. Parks	Yes	Yes	Yes	Yes	Yes	No	Yes
rwalbon@inscapepublishing.com	Amy Di Sandstrom	Yes	Yes	Yes	Yes	Yes	No	Yes
rwalbon@inscapepublishing.com	George C. Karlstad	Yes	Yes	Yes	Yes	Yes	No	Yes

Unaffected Reports

Email	Name	View Online	My Style	About DiSC	Customer Interaction Maps	Comparison Site	Tailoring	Email Sent
dhudson@inscapepublishing.com	Ed Martin	Yes	Yes	Yes	Yes	Yes	No	No

You now have access to **MyEverythingDiSC.com** for the **Everything DiSC Sales Profile.**

You now have access to the following options:
Tell Me More About My Style
Tell Me More About DiSC
Everything DiSC Sales Customer Interaction Maps
Everything DiSC Comparison Reports

Please click on the link below and select the "MyEverythingDiSC.com" button and login or create an account to add this profile to the site.

https://www.inscape-epic.com/default.aspx?ac=LLCHNVB566

If you have problems with the link, you can copy and paste the URL below:

https://www.inscape-epic.com

General Topics

Credits

Credits are the currency used in EPIC, and are needed to create new reports, issue Access Codes, and add supplemental reports.

Credit Balance & Credit Reminder

Your current credit balance is displayed in the upper right portion of your EPIC administrator screen underneath your User ID and the session timer.

When the credit balance font color changes from Black to Red, it is an indication that you have reached your Credit Reminder threshold.

Purchase or Transfer Credits
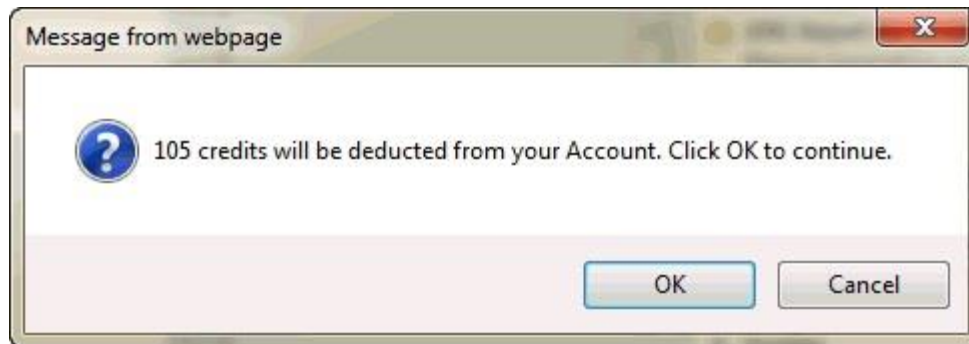
Credits can be:

- Purchased on-line using the Purchase Credits Online function.

- Transferred to a Sub Accounts using the Transfer Credits link for a Sub Account.

- Transferred from a Sub Account back to its Parent Account using the Transfer Credits to Parent Account function.

- Order EPIC Credits at www.EPICCredits.com
  Or call (877) 311-DISC Email: wiley@internalchange.com

Credits Charged for Reports

Anytime credits are about to be deducted from your account, you will receive a confirmation message asking you to confirm the dedictopm. Credits will never be removed from your account unless you approve the deduction by pressing **OK**:

Each report in the system is assigned a credit value. Credit values assigned to each of the reports can be reviewed at **Manage Your Account ▸ Credits Charged for Reports**. Credits are charged when you create reports using the following functions including:

- Entering Tally Box Scores to generate a report (Create a New Report/Issue Access Codes)
- Creating a facilitator or group report (Create a New Report/Issue Access Codes)
- Creating new reports using the **Edit Existing Reports** Advanced Options **Use Existing Data for New Report** button for a selected report
- **Batch Functions ▸** Use Existing Data for New Report
- Edit Existing Reports: when adding supplemental reports to an existing report
- Creating a new Sub Account

Generate and Regenerate Reports at No Additional Charge

Report generation using View/Print/Email Completed Reports does not deduct additional credits from your credit balance.

Data Protection Policy

Inscape's Data Protection Consent Form is designed to meet the conditions outlined by the European Union Directive 95/46 and the UK Data Protection Act of 1998, relating to the protection of individuals with regard to the processing of personal data. The site is also certified compliant with U.S.-EU Safe Harbor and is recertified every year by TRUSTe.

Respondents for all 'non-US English' profiles must accept the policy to begin an online assessment. When a Respondent does not accept the policy, they are not allowed to continue to take the online assessment, and an email is sent to the EPIC administrator for the account.

Inscape Publishing is a licensee of the TRUSTe Privacy Program. TRUSTe is an independent organization whose mission is to build user's trust and confidence in the Internet by promoting the use of fair information practices. This privacy statement covers the Web site www.inscape-epic.com. Because this Web site wants to demonstrate its commitment to your privacy, it has agreed to disclose its information practices and have its privacy practices reviewed for compliance by TRUSTe.

If you have questions or concerns regarding this statement, you should first contact the Rights Department at Inscape Publishing (rights@inscapepublishing.com). If you do not receive acknowledgement of your inquiry or your inquiry has not been satisfactorily addressed, you should contact TRUSTe at http://watchdog.truste.com/pvr.php?page=complaint TRUSTe will then serve as a liaison with us to resolve your concerns.

Inscape Publishing complies with the EU Safe Harbor framework as set forth by the Department of Commerce regarding the collection, use, and retention of data from the European Union.

This Web site is designed to provide you with a personalized Report. 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 personalized report. You will be required to provide your first and last 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 such as age, location, education, and employment that will be used by Inscape Publishing for continued validation of this report. We also collect

your email address to send you your results. This consent form sets out the manner in which your responses will be collected, processed, transferred, used, and stored.

We will not send you any promotional communications. We will only send you service related communications that are necessary to perform the duties of the site. We do not share, sell, rent, or trade personal data collected on this site with third parties for their promotional purposes.

We reserve the right to disclose your personal data as required by law and when we believe that disclosure is necessary to protect our rights and/or comply with a judicial proceeding, court order, or legal process served on our Web site.

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 (if not already in the United States) and stored on Inscape Publishing's secure server located in Minneapolis, Minnesota. Access to your personal data and any demographic information you supplied is restricted to authorized personnel and staff at Inscape Publishing, Inc.

Your personalized report will be provided to you in one of two methods depending upon the option selected by the individual (administrator) who sent you the Access Codes 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.

The administrator who sent you the Access Codes to this report does have access to your personal data, such as your first and last name, and email address. They will only use this third party personal data for the purpose it was intended for.

If you would like access to the personal data we have on file to correct inaccuracies or delete it, please contact us at the information below. We will respond to your request within 30 days.

The administrator who sent you the Access Codes has access to the completed report – not the individual data items and responses provided by you nor 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 nor to 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.

Security

The security of your personal information is important to us. When you enter information on our registration or order forms, we encrypt that information using secure socket layer technology (SSL). Our entire site is SSL encrypted.

We follow generally accepted industry standards to protect the personal information submitted to us, both during transmission and once we receive it. No method of transmission over the Internet, or method of electronic storage, is 100% secure, however. Therefore, while we strive to use commercially acceptable means to protect your personal data, we cannot guarantee its absolute security.

Log Files

As is true of most Web sites, we gather certain information automatically and store it in log files. This information includes internet protocol (IP) addresses, browser type, internet service provider (ISP), referring/exit pages, operating system, date/time stamp, and clickstream data.

We use this information, which does not identify individual users, to analyze trends, to administer the site, to track users' movements around the site and to gather demographic information about our user base as a whole.

We do not link this automatically-collected data to personally identifiable information.

Cookies

A cookie is a small text file that is stored on a user's computer for record-keeping purposes. We use cookies on this site. We do not link the information we store in cookies to any personal data you submit while on our site.

We use session ID cookies. We use session cookies to make it easier for you to navigate our site. A session ID cookie expires when you close your browser. A persistent cookie remains on your hard drive for an extended period of time.

Changes in this Data Privacy Statement

If we decide to change our privacy policy, we will post those changes to this privacy statement, the home page, and other places we deem appropriate so that you are aware of what information we collect, how we use it, and under what circumstances, if any, we disclose it.

We reserve the right to modify this privacy statement at any time, so please review it frequently. If we make material changes to this policy, we will notify you here, by email, or by means of a notice on our home page.

Contact Us

Inscape Publishing

Attn: Rights Department

6465 Wayzata Blvd

Suite 800

St Louis Park, MN 55426

Printing in Greyscale/Black and White

Using your printer settings, you can print a color report in greyscale/black and white.

1. Generate the color report. (See View/Print/Email Completed Reports)

2. Use the **View** option to open the document as a PDF. Locate the File menu and choose **Print**, or (2) press the printer icon:
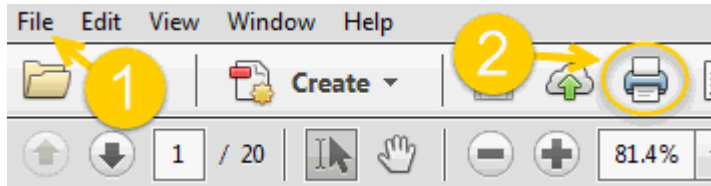
3. Locate the printer setting which allows you to change the color output, and choose to print in greyscale and/or black and white. This step may vary depending on your printer brand/style. One example is shown here:
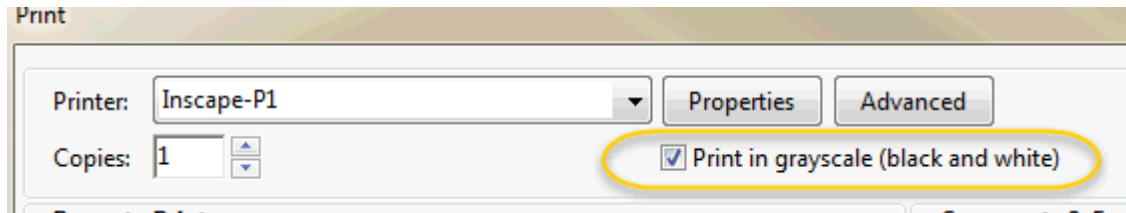
4. Print your document.

Profile Cover Page

Regardless of when you generate/regenerate a report, the date displayed on the cover will always be the date the Respondent completed the assessment.

The Respondent name used in the report is the name entered by the Respondent when they completed the online profile. Use Edit Existing Reports to make changes to the Respondent-entered name.

Personalize the cover page with your company name, contact information and company logo at View/Edit Account Information.

Do you want to change the product name to match your training program? Use Report Tailoring to personalize the cover even further.

Search

Search Tips

- Organize your records into folders to easily locate them using the search function.

- Use partial information to locate records in the folder, subfolder, email address, and name fields. Example: Type **@Wiley.com** in the email field, and your search results will include records with email addresses ending in **@Wiley.com** .

- Search for a **363®** ED 363 for Leaders or **LPI®** LPI: Next Generation report by Leader name (Raters/Observers are not returned separately).

- Search results for ▲ Five Behaviors Products may include the Annotated Team Report and Progress Report along with the

associated individual team member reports, depending on which EPIC function you are using.

- Non-batch search pages allow you to simply leave all search criteria fields blank to return a complete set of records, or use any number of fields to narrow your search.

- Batch Functions require the selection of a Product Family and Product, since these functions are designed to work with a large group of similar products.

Search Criteria

Sub Account:	To view reports created by Sub Accounts in your hierarchy, first provide documentation of approval by involved account holders to EPIC Technical Support.
Name:	Enter text here and EPIC will return records with your text in all name fields including first name, last name, alternate name, team name, ED 363 for Leaders Leader name, LPI: Next Generation Leader name, and group report name. Rater/Observer names cannot be found using the Search function.
Results Per Page:	Increase this value to view multiple results on one page, but note that search results may take longer to display when a large quantity of records are returned.
Folder/Sub Folder:	Select the folder/subfolder you created for your reports to easily locate and work with a group of related records.

Search Results

Sort

By default, search results are returned in descending order by the date the profile was assigned. Modify the order in which results are displayed using the **Sort by** list. Select a new option, choose ascending or descending order, and press the **Sort** button to apply changes.

Report Status and Report Summary

- The **Report Status** link indicates this report has not yet met completion requirements for viewing/printing; select the **Report Status** link to view report completion criteria.

- The **Report summary** link provides a snapshot of profile completion status for all individuals involved in a ED 363 for Leaders profile, an LPI: Next Generation profile, and a Five Behaviors Team.

Multi-Respondent Reports

- 363® ED 363 and LPI® LPI: Next Generation reports are considered in EPIC to be complete when the Leader and 1 Rater/Observer have completed the assessment, and are able to be generated when the Leader and 2 Raters/Observers in any category have completed the assessment. In cases where there is a Manager type of Rater/Observer assigned, the report can be generated when the Leader and 1 Manager have completed the assessment. A Report Status link will indicate those in your search results which cannot yet be generated.

- Two criteria must be met before a ▲ Five Behaviors individual or Annotated Team Report can be generated.

    1. A minimum of three (3) team member profiles must be completed AND

    2. A minimum of three (3) of the completed profiles must be set to Include = Yes.

- If a completed individual report cannot be generated, it will be included in search results but you will not be able to select it. Instead of the Select link, the Report Status link will be displayed.

- The ▲ Five Behaviors Annotated Team Report is displayed in search results once the minimum criteria are met. The Annotated Team Report can be easily identified in the list of individual and team reports by the existence of the **Report summary** link. Use the **Report summary** link for each report to view the progress of the included Respondents.

Group Report Search

Group reports require product-specifc searches. Select the **Add Participant** button to add completed profiles of that section's product type (pending profiles cannot be used to create group reports).

(View/Hide Image)

Selecting Search Results

Check the box beside the individual records to select the records, or press the **Select All** button at the bottom of the page to select all reports returned in your search.

Undeliverable Email

Email messages unable to be delivered to the recipient due to an undeliverable email address will be returned to your EPIC account email address (entered in the Company Information section on the View/Edit Account Information page). To resend the Access Codes, you will need to correct the email address using Edit Existing Reports feature. When the email address is corrected, a new Access Codes email will be sent to the Respondent using the new email address.