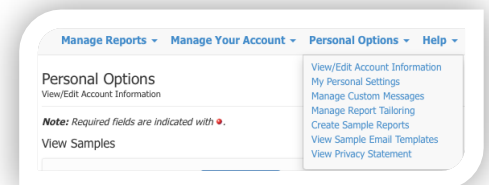


Getting Started Guide

Setting Up Your EPIC Account & Adding Your Brand to DiSC Reports



This visual shows **GENERALLY** what you will see within EPIC's setting **PERSONAL OPTIONS**.

Inside this booklet, you will find explanations and instructions for the fields your need to complete.

Note the ? symbols throughout EPIC. Click on these for more information.

2 ways to access the EPIC site:

- 1) Click on the link within the email that initiated your EPIC account
- 2) Go to: <https://admin.inscape-epic.com>
 - > You will be prompted for your USERID (usually your first initial and last name in lowercase, no spaces).
 - > You will be prompted to recognize privacy setting and to set your new password.
 - > Once within the EPIC system: select **PERSONAL OPTIONS** from the top menu, and **View/Edit Account Information** from the pull-down options.

Personal Options
View/Edit Account Information

Note: Required fields are indicated with *.

Company Information

Company Name: The name of your company
Administrator Name: Your name is displayed in the default email subject line when assigning Access Codes

Username: Your Username
Email: Your email addresses **Primary** Multiple Email Addresses

Email "From" Name: "Friendly" name which appears to email recipients

Email Display:

Contact Information

Contact Line 1: <input type="text" value="Sally Seppanen"/>	<small>Ex: Contact Name</small>
Contact Line 2: <input type="text" value="Sepp6 Leadership Coaching & Con"/>	<small>Ex: Company Name</small>
Contact Line 3: <input type="text" value="Washington, DC"/>	<small>Ex: Contact Address 1</small>
Contact Line 4: <input type="text" value="202.607.4828"/>	<small>Ex: Contact Address 2</small>
Contact Line 5: <input type="text" value="www.sepp6.com"/>	<small>Ex: Contact Phone</small>
Contact Line 6: <input type="text" value="sally@sepp6.com"/>	<small>Ex: Company Website</small>
Contact Line 7: <input type="text"/>	<small>Ex: Contact Email</small>

Company Logo

Your Company Logo will be displayed on the front cover of your profiles.

Required File Type: JPEG, PNG or GIF
Recommended Size: 750 X 750 pixels
Recommended Resolution: 300 dpi
The system will automatically size your logo for optimal display in the EPIC system.

Company Website

Company URL: (Example: www.wiley.com)

Language Options

Site Language: The language this site displays
Default Product Language: Preselected when creating profiles

Email Options

Assign Access Code Subject: Default Subject
Custom Subject:

EPIC Email System Variable: To add an EPIC system variable to the Custom Subject, select the variable from the list above, position the cursor where you want the variable to be placed in the Custom Subject field, and then click the Insert button.

Email Format: HTML Plain Text
Profile Completion Email: Notify me via email when a respondent completes a profile

Credit Reminder

Credit Reminder Balance: +

Time Zone Settings

Time Zone: Your local time zone

Advanced Options

Session Timeout: minutes
Allow viewing reports online by default:
Enable Future Delivery and Auto Reminder feature for assigning Access Codes:
Allow me to customize the subject line for the Auto Reminder email:


EPIC Getting Started Guide

Log into your EPIC account

Choose Personal Options ▶ View/Edit Account Information from the EPIC menu.

<p>Report Cover Contact Information</p>	<p>Enter up to seven (7) lines of text. Each line of text is limited to 50 characters. Line #1 is a required field.</p> <p>Your Contact Information is displayed in the following locations:</p> <ul style="list-style-type: none"> > 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 > The "Provided By" branding on MyEverythingDiSC.com accounts created by your Respondents 	
<p>Company Information</p>	<p>Company Name</p>	<p>Enter your company name</p>
	<p>Company Website</p>	<p>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 on the website where they complete the online assessment.</p>
	<p>Company Logo</p>	<p>Upload your Company Logo to be displayed on the first page of a Respondent's online assessment and on the front cover of your profiles.</p> <ul style="list-style-type: none"> > Press the Upload Logo button to locate and upload your logo to EPIC. Use the Delete Logo button to remove it at any time. <ul style="list-style-type: none"> ▪ <u>Optimal file type:</u> JPG or GIF, 750 X 750 pixels, Resolution of 300 DPI. <p>Note: 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 when you select the B/W print option for printing reports.</p>
	<p>Email</p>	<p>EPIC uses email to notify you when a process has completed, to send password reset messages, and to auto-forward undeliverable bounce-back notifications. To include more than one administrator, click Add and designated one as the primary and click Set.</p>
	<p>Email "From" Name</p>	<p>This name precedes your email address in emails you send via EPIC.</p>
	<p>Email Display</p>	<p>A preview of your email address and "From" name – from designation in Email "From" Name field (above).</p>
<p>Emails Sent From My EPIC Account</p>	<p>Administrator Name</p>	<p>Enter the name of the primary contact for your account. This is a required field to complete. This name is displayed in the default email subject line when assigning online access codes, so enter the name as you wish it to appear to your Respondents. A full name is recommended.</p>
	<p>Outgoing "From" Name</p>	<p>This is the "Friendly" name that appears before the bracketed email address, e.g., <i>Your HR Team</i>. This field is optional.</p>
	<p>Outgoing Email Username</p>	<p>The Outgoing Email Username is displayed before @inscape-epic.com in the email that accompanies any access code you issue. It is recommended that you select something that represents your account or company for this username; e.g., this can be your company or department name, such as ABC.</p>
	<p>Email Display</p>	<p>This is based on your "From" name – from designation in Email "From" Name field and your Outgoing Email Username (both above); e.g., Your HR Team<ABC@inscape-epic.com></p>

<p>(continued) Emails Sent From My EPIC Account</p>	<p>Assign Access Code Subject</p>	<p>The Default subject is: [ADMIN NAME] has registered you for: [PRODUCT NAME]. System variables are used in the default to personalize items in the subject line, as noted within brackets.</p> <ul style="list-style-type: none"> > You can change the default by creating a Custom Subject for Access Code email to Respondents; e.g., Action Requested: Please complete DiSC report (You are able to change either subject line you choose when issuing reports. This option establishes your default subject line.)
	<p>EPIC Email system variable</p> <p>NOTE: NOT CRITICAL – I usually never use system variables</p>	<p>You can personalize your custom email messages using the six (6) EPIC System Variables: [RESPONDENT NAME], [LEADER NAME], [ACCESS CODE], [ADMIN COMPANY NAME], [ADMIN NAME], and [PRODUCT NAME].</p> <p>To add an EPIC system variable to the Custom Subject, select the variable from the drop-down list, position the cursor where you want the variable to be placed in the Custom Subject field and then click the Insert button.</p> <ul style="list-style-type: none"> > Before the email is sent, EPIC replaces the field placeholder with the actual Respondent Name, Leader Name, etc. > To use a System Variable, either (1) enter it into the subject line or body text within the brackets, and using all capital letters (example: [LEADER NAME]), or (2) select one from the list, position your cursor where you want it to be placed within the text box, then press the Insert button.
	<p>Email Format</p>	<p>Choose to send HTML format emails and have the option to use colorful and accented text, graphics, and links to web pages.</p> <p>When you choose to set your account to send HTML messages, the HTML editor will be available to you when you create custom messages.</p>
<p>Email EPIC System Notifications to:</p>	<p>Notifications Email Addresses</p>	<p>At least one Email address is required for each EPIC account. To have identical messages sent to more than one administrator, enter each email address in the text box and click Add.</p> <p>If multiple email addresses exist, one must be designated as the primary. Bounce-back messages will only be sent to the primary email address. Designate a new primary address by clicking Set.</p> <p>You can choose to add multiple email addresses to have identical messages sent to additional administrators. Note that bounce-back messages will only be sent to the primary email address.</p>
	<p>Default Profile Completion Email</p>	<p>Set the default for Profile Completion Email messages by checking or unchecking the box. When checked, an email will be sent to the addresses in the Notifications Email Addresses list every time a Respondent completes an online assessment. Individual users can override this default by changing their setting under Personal Options > My Personal Settings.</p>
<p>Credit Reminder</p>		<p>When the credit balance reaches the number entered into this field, EPIC sends an email reminder to the account administrator that the Credit balance has reached this threshold.</p>
<p>Language Options</p>	<p>Site Language</p>	<p>Set the language used on the EPIC site (e.g., English)</p>
	<p>Default Product Language</p>	<p>The language you choose will be used as your default product language whenever you use the search criteria fields. EPIC will automatically choose this language to save you a step, but you are able to override this choice at any time. For language other than English, contact me.</p>
<p>Time Zone Settings</p>		<p>This required Field allows you to set up a time zone. This is mostly used with Future Delivery and Auto Reminder emails.</p>

Advanced Options	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.	
	Allow viewing Reports online by 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.	
	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.	
	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. E.g., Immediate Action Requested: Complete DiSC Report > 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.	
Save	 Important: Press the Save button at to bottom of the page to apply the changes.	After saving, Use the options at top of the page to:	
		VIEW Sample Report Cover Press the View button for the Sample Report Cover for an example of how your company branding and contact information will appear on report covers.	VIEW Sample Welcome Page Press the View button for the Sample Welcome Page to see an example of how your company branding and contact information will appear to Respondents who are taking the online assessment.
<p>EPIC HELP: Be sure to see the robust and extensive menu in EPIC HELP, with written and video instructions. You can find most everything within EPIC HELP You can also download EPIC HELP Instructions from the EPIC HELP menu.</p>			

You're Ready to Go!

Any questions, contact sally@sepp6.com
<https://sepp6.com/disc>

Note: EPIC is a platform of John Wiley & Sons. Sepp6 has established your sub-account.