

EPIC Help Online

for Sub Accounts

Version 2018.08.03

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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Help Home

Welcome to EPIC Help

-  Check out **MyEverythingDiSC!**
-  New to EPIC? Begin with the **Getting Started Guide**.
-  Need to add someone to an existing **Five Behaviors** team or **Five Behaviors Progress Report**? Click **here** to see how.
-  **Leap Forward Program**: a cost-effective way to migrate your clients from DiSC Classic to Everything DiSC!

Quick Links

Create New Reports

- [Create a New Report / Issue Access Codes](#)

Your EPIC Account

- [View/Edit Account Information](#)

Edit Existing Reports

- [Edit One Report](#)
- [Edit Many Reports at One Time](#)
-  [Edit a Five Behaviors Team or Progress Report](#)

Sub Accounts

- [Manage Individual Sub Accounts](#)

Print or Email Completed Reports

- [View/Print/Email One Report](#)
- [View/Print Email Many Reports at One Time](#)



MyEverythingDiSC

- [Add MyEverythingDiSC to Access Codes](#)



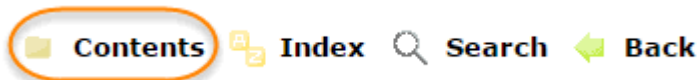
Search for Help

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.



About EPIC



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.

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 their personalized profile right away. Give your respondents access to view their profile online, or choose to print the reports to provide during training facilitation.

Customizable Features

You can personalize reports with your company name, training program, and logo. Your company information also appears on the online assessment site and in emailed information from EPIC, providing Respondents with a consistent association with your brand. (See [More...](#))

You can tailor  Everything DiSC® and  The Five Behaviors of a Cohesive Team® 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. ([See More...](#))

Exclusive Extras

Make training stick with exclusive supplemental reports and MyEverythingDiSC! Supplemental reports allow you to build group reports from participant profiles in your EPIC account, and easily move people in and out of them as work groups change. MyEverythingDiSC is a bonus feature of Everything DiSC profiles that provides a platform for

insights and interactions based on a Respondent's DiSC style. ([Go to MyEverythingDiSC Help](#))

Getting Started Guide

Use the links below for help on setting up your new EPIC account and creating new reports.

Terms and Definitions

Before you get started, check out the meanings of some commonly used terms, such as "credit" and "access code". ([Go to Terms and Definitions](#))

Set Up Your Account & Add Your Brand

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

Enter your contact information, company information and logo to add your brand to EPIC assessments and profiles. You can also use this function to set your default account settings in EPIC; these settings can be used to save you time and activate administrative features for your account.

([Go to the View/Edit Account Information help topic](#))

Create New Reports & Email Online Assessments to Your Participants

Choose **Manage Reports** ▶ **Create a New Report/Issue Access Codes** from the EPIC menu.

Select one of your available products, and then add the names and email addresses of your participants (EPIC Respondents). EPIC creates a unique Access Code for each Respondent's report. The Respondents receive an email containing a link to an online assessment, and their responses are used to create their completed report.

([Go to the Create a New Report/Issue Access Codes help topic](#))

Resend the Assessment Email to Your Participants

Choose **Manage Reports** ▶ **Resend Login Information** from the EPIC menu.

Search for the pending assessments using the Search function, select the report Access Codes you wish to have resent (via email) to your participants, and optionally, create a custom email message to include.

([Go to the Resend Login Information help topic](#))

Edit Existing Reports

Choose **Manage Reports** ▶ **Edit Existing Reports** from the EPIC menu.

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.

(Go to the [Edit Existing Reports](#) help topic)

(Go to the [Edit Existing Five Behaviors Team](#) help topic)

Print a Set of Completed Reports to Take to Training

Choose **Manage Reports** ▶ **Batch Functions** ▶ **Generate Reports for Download** from the EPIC menu.

Search for the group of reports you wish to print, and EPIC generates the reports all at one time. (EPIC "generates" a report by pulling in the online assessment responses for the participant.) EPIC will create a zip file containing the entire set of generated reports for you. You can quickly save these PDF formatted files to your computer to print all at one time.

(Go to the [Batch Generate Reports for Download](#) help topic)

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.

Annotated Team Report: ▲ The Five Behaviors of a Cohesive Team and Five Behaviors Progress Reports include an individual report for each team member, and an Annotated Team Report for facilitation. EPIC automatically creates the Annotated Team Report (ATR) when you create Access Codes for the individual team members; the Annotated Team Report is the Parent Access Code under which the individual team member Access Codes are created. The Annotated Team Report will appear in EPIC search results along side the individual team member reports. The ATR will display **Participants** and "**Report summary...**" rather than Name, Respondent Name, and Email.

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 (such as Everything DiSC 363 for Leaders) have a completed status when the Leader and a minimum number of required Raters 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. (*Go to EPIC Help topic: [Credits](#)*)

EPIC User Level: There are two levels of users in EPIC. Users can be assigned as either a **Super Administrator** (Super Admin) or an **Administrator** (Admin). Each account must have at least one Super Admin but can have multiple. An account can also have multiple Admins, or none at all.

EPIC Super Administrator: an EPIC Primary or Sub account user with full access to all EPIC functionality. The first user created in an EPIC account is a Super Administrator. The **Super Admin** can do everything in EPIC, including adding, deleting, and editing user information for other Super Admins and Admins. Only Super Admins can change the company's information under **Personal Options** ▶ [View/Edit Account Information](#).

EPIC Administrator: an EPIC Primary or Sub account user with fewer account permissions than a Super Administrator. Administrator users can do

everything that the Super Administrator can do except purchase credits, edit the company's personal options, and manage users.

Multiple-respondent report: Products in EPIC, such as Everything DiSC 363 for Leaders, which allow for a Leader and Raters to complete an assessment regarding the Leader are considered multiple-respondent reports. Report generation requirements depend upon Rater type and the number of any type which have completed the online assessment.

Five Behaviors of a Cohesive Team and Five Behaviors Progress Reports are also considered multiple-respondent reports. A minimum of three respondents must complete the assessment before either can be generated.

MyEverythingDiSC: An interactive site that allows participants to invite colleagues to create Everything DiSC Comparison Reports, to learn more about their personal DiSC style, and to create Customer Interaction Maps (for Everything DiSC Sales Profiles).

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 (1) an individual online assessment has not yet been completed, or (2) 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 a product profile/report.

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

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

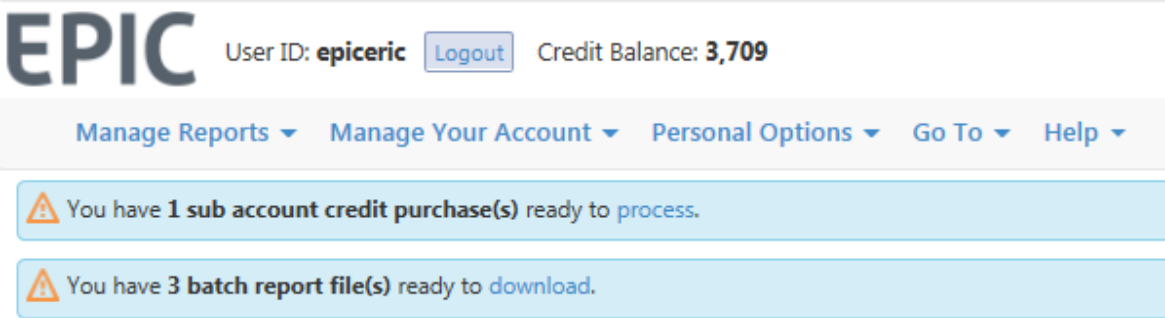
Sub Account: a client account created in EPIC by an Authorized Partner or by Partner Care.

EPIC Home Page

Your EPIC Home page provides quick access to some of EPIC’s most popular features, including recent transactions, report tools, and news and announcements.

Banner Messages

Banner messages appear when certain activities have been completed within the EPIC system and are ready for further action or review.

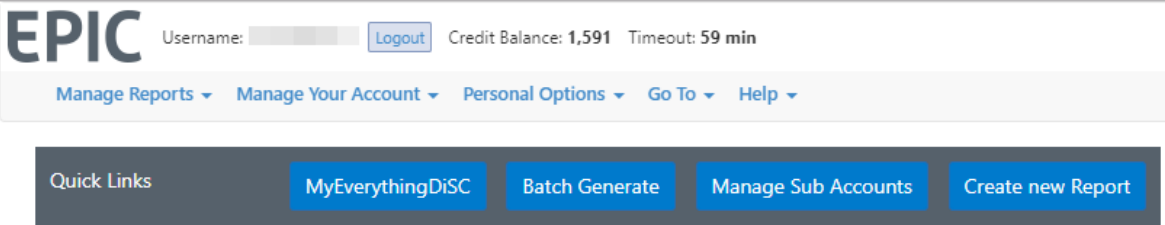


- The Sub Account credit purchase banner links to the Process Sub Account Credit Purchases tool.
- The batch report banner links to the [Manage Existing Download Files](#) tool.

Banner messages only appear when pending purchases or new batch files exist. The banners cannot be disabled or customized.

Quick Links

Use the Quick Links bar at the top of the home page to jump directly to some of the most commonly-used pages on the EPIC site.



The links that appear vary by user type, but include four of the following:

- Create New Report – links to [Create a New Report](#) tool
- Manage Sub Accounts – links to [Manage Individual Sub Accounts](#) tool (only available to users who have at least one subaccount)
- Purchase Credits (within Sub Accounts) – links to [Purchase Credits from Parent Account](#) page (only available to sub account users)
- Batch Generate – links to Batch Function [Generate Reports for Download](#) tool
- MyEverythingDiSC – links to [MyEverythingDiSC Add/Remove Options](#) batch tool
- Custom Messages – links to [Manage Custom Messages](#) tool

The Quick Links bar appears at the top of the home page and cannot be moved or customized.

Home Page Widgets

[Customize Your Home Page](#)

[Message from your Authorized Partner](#)

[EPIC News](#)

[Access Code Status](#)

[Sub Account Tracking](#)

[Credit Balance History](#)

The Sub Account Message and Sub Account Tracking widgets will only be available to accounts that have at least one Sub Account.

Customize Your Home Page

Use the Customize Your Home Page tool to choose which widgets you'd like to display on the home page.

Customize your Homepage Save & Close

Choose which widgets you'd like displayed:

<input checked="" type="checkbox"/> Access Code Status	<input checked="" type="checkbox"/> Sub Account Tracking
<input checked="" type="checkbox"/> EPIC Credit Balance History	


[Reset to Default](#)

Click "Customize..."

Uncheck any widgets that you no longer wish to see on your home page.

Click "Save & Close" to finalize your changes. The customizations will remain in place when you log in to EPIC in the future.

Tips:

- If you do not see the option to uncheck a particular widget, then it cannot be removed from the home page.
- To optimize your home page view, you can also move widgets to different locations on the page. Click the  icon in the upper left corner of any widget to drag the box to a new position on the page. These changes will remain in place when you log in to EPIC in the future.
- You can select "Restore to Default" at any time to restore default home page settings.
- Sub account widgets are only available within accounts that have at least one Sub Account.

Message from "*Your Authorized Partner*"

Sub Accounts can view the customized content provided by their Authorized Partner. This widget will be available to sub accounts whose Partner has activated it.

- This widget cannot be removed from the home page.
- Click the icon in the upper left corner to drag the box to a different place on the page.
- To temporarily collapse the widget, click the icon in the upper right corner. It will be restored to its normal size the next time you view or refresh the page.

EPIC News

Discover the latest news and tips related to your EPIC account. We post news, features, upgrades, and system maintenance notices specific to the EPIC application in the **EPIC News** home page widget. (Available to Sub Accounts only.)

1. Select any headline to read a brief description.
2. Choose "Read more..." to access the full article.
3. Select "View Archives" to access older news releases going back 18 months.

Tips:

- This widget cannot be removed from the home page.
- Click the icon in the upper left corner to drag the box to a different place on the page.
- To temporarily collapse the widget, click the icon in the upper right corner. It will be restored to its normal size the next time you view or refresh the page.

Access Code Status

View a month-by-month summary of access codes that have been sent to users from this account.

1. Use the arrows on either side of the month/year to navigate between different months. The last 12 months of access codes are available to view.
2. Select "Pending" in the lower left corner to view all access codes sent out in the specified month that have not yet been completed.
 - Choose "Resend Login Info" to go to the [Resend Login Information](#) tool.
3. Select "Date Emailed" to view all access codes sent in the specified month and their current status.
 - Choose "Batch Edit" to go to the [Batch Edit Report Options](#) tool.
 - Choose "Edit Report" to go to the [Edit Existing Report](#) tool.
4. Select "Completed" to view all assessments completed in the specified month.

- Choose "View/Print/Email Report" to go to the [View Completed Reports](#) tool.

Tips:

- Access Codes default to sorting by date. Select "Name," "Folder" or "Status" to re-sort by these categories.
- To remove this widget from the home page, use the [Customize Your Home Page](#) tool.
- Click the icon in the upper left corner to drag the box to a different place on the page.
- To temporarily collapse the widget, click the icon in the upper right corner. It will be restored to its normal size the next time you view or refresh the page.

Sub Account Tracking

Manage and view the recent activity of up to 25 Sub Accounts.

✦ Sub Account Tracking
—

Tracking 4 sub accounts

Sort by: Company name

<div style="background-color: #27ae60; color: white; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin: 0 auto;">BB</div> <p>Big Box Company</p>	Credit balance 100 Credits used (30 days) 400 Reports assigned (30 days) 24 Last EPIC login 4/9/2018	Manage
<div style="background-color: #2980b9; color: white; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin: 0 auto;">CA</div> <p>Company A - Regional HQ</p>	Credit balance 5,197 Credits used (30 days) 1,780 Reports assigned (30 days) 96 Last EPIC login 4/11/2018	Manage
<div style="background-color: #2980b9; color: white; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin: 0 auto;">CA</div> <p>Create a Roadster</p>	Credit balance 2,515 Credits used (30 days) 175 Reports assigned (30 days) 5 Last EPIC login 3/30/2018	Manage
<div style="background-color: #34495e; color: white; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin: 0 auto;">HL</div> <p>Hoffmann</p>	Credit balance 500 Credits used (30 days) 0 Reports assigned (30 days) 0	Manage

* Not since 11/17/2016

✉ Send Email
Manage Sub Account Tracking

1. Review each Sub Account entry for the current credit balance, a summary of credits used and reports assigned within the last 30 days, and the date of the Sub Account user's last EPIC login.
2. Select "Manage" next to any sub account entry to go to the [Manage Individual Sub Accounts](#) tool.
3. Select "Send Email" in the lower left corner to send a batch email to various sub accounts using the Send Email to Sub Accounts tool.
4. Select "Manage Sub Account Tracking" in the lower right corner to access the Sub Account Tracking tool. This allows you to choose which Sub Accounts you want to see in the Sub Account Tracking widget. You can track the activity of up to 25 Sub Accounts.

Tips:

- Use the "Sort by" dropdown to reorder the sub accounts by name, last login, low credit balance, credits used, or reports assigned.
- To remove this widget from the home page, use the [Customize Your Home Page](#) tool.
- Click the icon in the upper left corner to drag the box to a different place on the page.
- To temporarily collapse the widget, click the icon in the upper right corner. It will be restored to its normal size the next time you view or refresh the page.

Credit Balance History

View a month-by-month summary of credit usage in your account.

1. Use the arrows on either side of the month/year to navigate between different months. The last 12 months of credit usage is available to view.
2. Toggle between "Totals" and "Details" in the lower left corner of the widget.
 - "Totals" shows the account starting balance, ending balance, and monthly totals for various transaction types including credits purchased, access codes assigned, and transfers between parent and sub accounts.
 - "Details" shows the individual transactions listed in chronological order.

3. Select “Monthly Credit Activity” in the lower right corner to run the [Monthly EPIC Credit Activity Report](#)


Tips:

- To remove this widget from the home page, use the [Customize Your Home Page](#) tool.
- Click the icon in the upper left corner to drag the box to a different place on the page.
- To temporarily collapse the widget, click the icon in the upper right corner. It will be restored to its normal size the next time you view or refresh the page.

Manage Reports

Create a New Report Issue Access Codes

Use the **Create a New Report/Issue Access Codes** function to create new reports and send emails containing access codes for online assessments. Choose a link below for help specific to the product.

 To add people to an existing Five Behaviors team or Progress Report, instead use the [Edit Existing Five Behaviors Team](#) function.

[Create Everything DiSC Reports](#)


[Create Five Behaviors Reports](#)

[Create DiSC Classic Reports](#)

[Create Access Code Extract Files](#)

Create Five Behaviors Reports

Choose a product below to see instructions for creating a specific Five Behaviors product.

 Do not use these instructions to add someone to an existing Five Behaviors team. Instead, [Edit the Existing Five Behaviors Team](#) and add individuals to the existing team.

[Five Behaviors Powered by DiSC: Individual](#)

[Five Behaviors Powered by DiSC: Progress](#)

[Five Behaviors Powered by DiSC: Demo Experience](#)

[Five Behaviors of a Cohesive Team Comparison Report](#)

[Five Behaviors Powered by All Types: Individual](#)

[Five Behaviors Powered by All Types: Progress](#)

[Five Behaviors Powered by All Types: Demo Experience](#)

Creation of Five Behaviors Annotated Team Reports

When you create a Five Behaviors team, EPIC creates an Access Code for each individual team member. EPIC also automatically creates an Annotated Team Report for use by the facilitator. This Annotated Team Report has its own Access Code, and is displayed in the same [search results](#) with the

individual team member reports. This Annotated Team Report includes the same team information displayed in the reports of the individuals, but also includes valuable facilitation information in the margins of the report.

Create a Five Behaviors of a Cohesive Team: Team Report

Use this process to create a new Five Behaviors Powered by DiSC or a Five Behaviors Powered by All Types report by entering individual names and email addresses, by importing a spreadsheet containing the names and email addresses, or by selecting someone with an existing, completed report in your EPIC account.


1. To begin, choose **Manage Reports** ▶ **Create a New Report/Issue Access Codes**
2. **Product Family**, **Product** and **Language** selections are required before you can continue. Make your selections and press **Next**.

Select a Product Family, Product, and Language, then click the **Next** button to continue.


Product Family:	<input type="text" value="- None Selected -"/>	▼
Product:	<input type="text" value="- None Selected -"/>	▼
Language:	<input type="text" value="- None Selected -"/>	▼

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

EPIC displays a message to let you know that this is not the correct way to add someone to an existing team and offers you a link to begin adding a team member:

 **Caution:** You are about to create an entirely new team report. If you are trying to add new team members to an existing team, [click here](#) to find that team's report and then click **Edit**.

3. In the **Report Options** section, you can uncheck boxes if you would like EPIC to exclude sections of the report in the generated version. You can easily include and exclude report sections each time you generate the report, so there is no wrong choice.

 *This image is an example only - Report Options vary by product.*

Report Options


Check a box to display an option in the report.

[Check All](#) | [Uncheck All](#)

- Introduction
- Building Trust
- Mastering Conflict
- Achieving Commitment
- Embracing Accountability
- Focusing on Results
- Strengths and Challenges


4. Press the **Next** button.
5. **Choose a folder** and/or sub folder in which to create new Access Codes or select the **New Folder** link to create a new folder.

Folder:	<input type="text" value="- None Selected -"/>	New Folder
Sub Folder:	<input type="text" value="- None Selected -"/>	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](#)

6. Team Name

 A team name is required for Five Behaviors 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:	<input type="text" value="Best Workgroup Ever"/>
------------	--

7. Select **Delivery and Auto Reminder Options**
8. Use one of the three available methods to add Respondents who will receive an Access Code Email to complete their online assessment.

Enter Individual Respondents

Enter an email address and a name for a Respondent, then press the **Add...** button.

After entering the Respondent information, click the **Add Respondent** button to add the name to the list. Click the **Assign Access Codes** button when you're finished adding Respondents.

(Note: If you assign more than 10 Access Codes, they will be queued for delivery and sent out in intervals to avoid being marked as "spam" by the Respondent's email server.)

Email Address:
 Name:
 Quantity:
 View Report: Yes No

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


Import Respondents Saver

Select the **Import from Excel** tab and upload an Excel spreadsheet of Respondents.

See [Download Import Templates](#) for complete instructions.

Click the **Upload** button to upload and import the Respondents. The file must be an Excel worksheet (.xls or .xlsx) type file. Download the import template [here](#).

Use Existing Report

 Saver When available, select the **Use Existing Report** tab, then use the **Search** button to search for and select Respondents with completed profiles.

Use the **Search** button to locate existing respondents who have already taken a report.


Note: Depending on the report, respondents may still need to answer additional questions.

- When using one completed Everything DiSC Respondent to create a new Everything DiSC or Five Behaviors report, Respondents will not be required to take the DiSC portion of the

assessment again. Their previous DiSC style scores will be used in the new report, and only the report-specific questions will be asked.

9. Respondent List

As you add Respondents using each of the possible ways, EPIC builds a Respondent List.

 *This image is an example only - credit charges vary by product.*

The list below displays the Respondents that will receive an Access Code. To remove a name from the list, click **X**.


Email Address		Name	Quantity	View Report
X bob@wiley.com	Edit	Bob	1	Yes
X chris@wiley.com	Edit	Chris	1	Yes
X leah@wiley.com	Edit	Leah	1	Yes

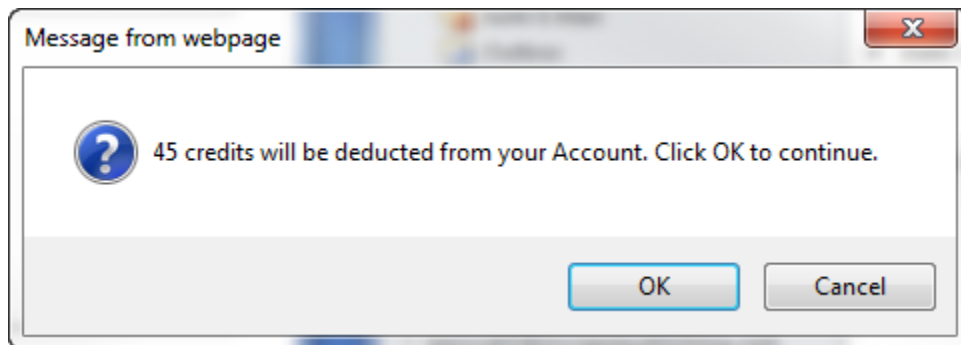
Total Quantity: 3
Total Credits: 45

Press the "**X**" at the beginning of a row to delete the Respondent from the list. Press the **Edit** link for a row to edit the email address, then press **Save** to save your changes.

EPIC displays the **Total Quantity** of access codes about to be created, and the **Total Credits** that will be charged during this transaction in EPIC.

10. Press the **Next** button to continue.
11. **Confirm the credit deduction** by pressing the **OK** button, or press **Cancel** to return to the page you were just on.


 *This image is an example only - credit charges vary by product.*




12. Create a [custom email subject line and/or message](#) for this set of Access Code emails by pressing **OK**, or press cancel to have EPIC

send the default email message. Once you are done creating your custom message, or after you have pressed the **Cancel** button, EPIC displays a confirmation page.

The **confirmation page** displays a summary of the product you just created, the Respondents who will receive an Access Code email, and EPIC credit activity associated with this transaction.

 *This image is an example only - credit charges vary by product.*


Respondents 




The screenshot shows a table with columns: Email, Name, View, and Status. A 'Show/Hide' button is highlighted in the top left. Below the table is a 'Summary' section with two rows of data.

Email	Name	View	Status
bob@wiley.com	Bob	Yes	Access Code created and email sent.
chris@wiley.com	Chris	Yes	Access Code created and email sent.
leah@wiley.com	Leah	Yes	Access Code created and email sent.

Summary	
Total Access Codes Created:	3
Previous Credit Balance:	1,790

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.

NOTE: If you added more than 10 Respondents or used the Future Delivery option (Delivery Options for Access Codes), the status column will indicate that the Access Code was created and email has been queued for delivery.

Respondents 




The screenshot shows a table with columns: Email, Name, View, and Status. A 'Show/Hide' button is highlighted in the top left. The 'Status' column for all three respondents is highlighted with a yellow box.

Email	Name	View	Status
bob@wiley.com	Bob	Yes	Access Code created and email queued for delivery.
chris@wiley.com	Chris	Yes	Access Code created and email queued for delivery.
leah@wiley.com	Leah	Yes	Access Code created and email queued for delivery.

Create a Five Behaviors Comparison Report

Use the steps below to create a comparison between two (2) individuals.

 **Saver** If you wish to create many comparison reports between many individuals at one time, do not use the steps below, but instead use the tool

under Manage Reports ▶ Batch Functions called **Create/Generate Comparison Reports**.

Steps for creating a Comparison Report between two (2) individuals:

1. To begin, choose **Manage Reports ▶ Create a New Report/Issue Access Codes**
2. **Product Family, Product** and **Language** selections are required before you can continue. Make your selections and press **Next**.

Select a Product Family, Product, and Language, then click the **Next** button to continue.

Product Family:	<input type="text" value="- None Selected -"/>	▼
Product:	<input type="text" value="- None Selected -"/>	▼
Language:	<input type="text" value="- None Selected -"/>	▼

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

3. Press the **Add** button to begin adding participants to the report.

Participants

Use the **Search** function to locate and select people to add to the report.

As you select participants, EPIC creates a list in the Participants section. You can continue to use the **Add** button to add participants, and you can press the "X" for any participant to remove them from the list.

Participants ?

Email	Name
<input type="checkbox"/> epicsub4@inscapepublishing.com	Joan Avery
<input type="checkbox"/> epicsub1@inscapepublishing.com	Bob McMater
<input type="checkbox"/> epicsub3@inscapepublishing.com	Annie Gould

4. Press the **Next** button.
5. EPIC charges zero (0) credits for this report. Press the **OK** button to continue.

The **confirmation screen** displays a summary of the product you just created and EPIC credits charged for creation of the report.

Press the plus sign **+** to the left of the **Show/Hide Report Participants** link to view the list of Participants included in the report.

Report Participants

<input type="checkbox"/> Show/Hide Report Participants		
Email	Name	Product
epicsub3@inscapepublishing.com	Annie Gshould	Everything DiSC Wc
epicsub1@inscapepublishing.com	Bob McMater	Everything DiSC Wc
epicsub4@inscapepublishing.com	Joan Avery	Everything DiSC Wc



Press the **View/Print/Email Report** button to generate a PDF version of the report, or press the **Edit this report again** button to make changes to this report.

Create a Five Behaviors of a Cohesive Team Progress Report

Use this process to create a new Five Behaviors of a Cohesive Team Progress report by selecting your initial Five Behaviors Team. You can remove team members or add additional team members by entering individual names and email addresses, by importing a spreadsheet containing the names and email addresses, or by selecting someone with an existing, completed report in your EPIC account.


1. To begin, choose **Manage Reports** **▶ Create a New Report/Issue Access Codes**
2. **Product Family, Product** and **Language** selections are required before you can continue. Make your selections and press **Next**.

Select a Product Family, Product, and Language, then click the **Next** button to continue.


Product Family:	<input type="text" value="- None Selected -"/>
Product:	<input type="text" value="- None Selected -"/>
Language:	<input type="text" value="- None Selected -"/>

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

EPIC displays a message to let you know that this is not the correct way to add someone to an existing team and offers you a link to begin adding a team member:

 **Caution:** You are about to create an entirely new team report. If you are trying to add new team members to an existing team, [click here](#) to find that team's report and then click **Edit**.

3. In the **Report Options** section, you can uncheck boxes if you would like EPIC to exclude sections of the report in the generated version. You can easily include and exclude report sections each time you generate the report, so there is no wrong choice.

 *This image is an example only - Report Options vary by product.*

Report Options

Check a box to display an option in the report.


[Check All](#) | [Uncheck All](#)

- Introduction
- Building Trust
- Mastering Conflict
- Achieving Commitment
- Embracing Accountability
- Focusing on Results
- Strengths and Challenges

4. Since you are creating a report on the progress of an existing team, you must now search for and select that existing team. You are able to choose Five Behaviors teams and previously completed Progress Reports in this step. In order for either of these reports to be available for you to choose, they must be a completed state; there must be at least three (3) team members with completed assessments and those three (3) team members must be included in the report. [Edit the original team](#) if you need to change the include/exclude option for any


of the team members before creating a Progress Report using the team.

5. **Choose a folder** and/or sub folder in which to create new Access Codes or select the **New Folder** link to create a new 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](#)

6. Team Name

 A team name is required for Five Behaviors 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:

Each time you create a new Progress Report for a team, you could include a month and year at the end to differentiate between similarly named team reports in EPIC. This will allow you to more easily search for and select the team later when you print the completed reports.

7. Choose **Delivery and Auto Reminder Options**
8. Use one of the three available methods to add new team members who will receive an Access Code Email to complete their online assessment. These added team members will be asked the Five Behaviors team-related assessment questions, but will be asked to clarify whether or not they participated in the last team assessment, and then will be opted out of any questions related to the team's progress.


1. Enter Individual Respondents

Enter an email address and a name for a Respondent, then press the **Add...** button.

Enter Individual | Import from Excel | Use Existing Report

After entering the Respondent information, click the **Add Respondent** button to add the name to the list. Click the **Assign Access Codes** button when you're finished adding Respondents.

(Note: If you assign more than 10 Access Codes, they will be queued for delivery and sent out in intervals to avoid being marked as "spam" by the Respondent's email server.)

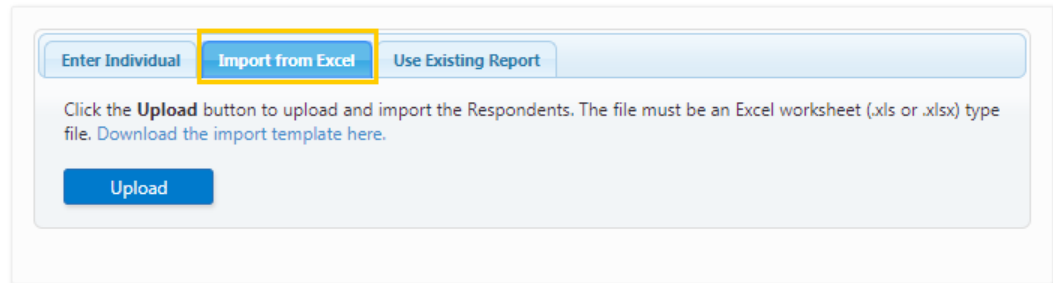
Email Address: Name: Quantity: View Report: Yes No **Add** 

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

2. Import Respondents


Select the **Import from Excel** tab and upload an Excel spreadsheet of Respondents.

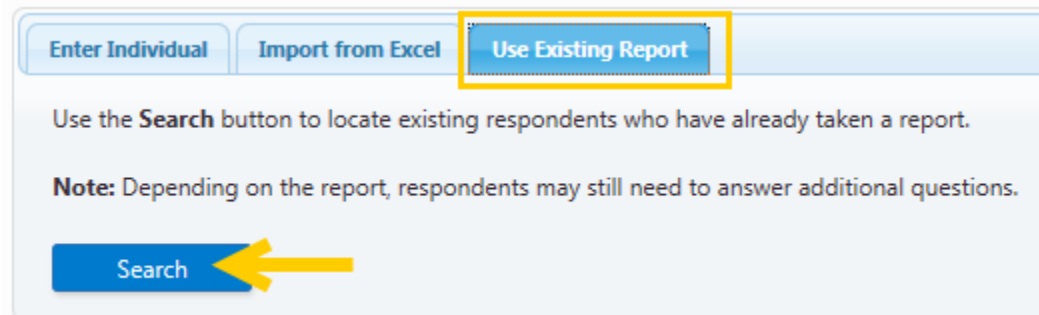
See [Download Import Templates](#) for complete instructions.



The screenshot shows a software interface with three tabs: "Enter Individual", "Import from Excel", and "Use Existing Report". The "Import from Excel" tab is highlighted with a yellow border. Below the tabs, there is a text instruction: "Click the **Upload** button to upload and import the Respondents. The file must be an Excel worksheet (.xls or .xlsx) type file. Download the import template here." Below this text is a blue "Upload" button.

3. Use Existing Report


 When available, select the **Use Existing Report** tab, then use the **Search** button to search for and select Respondents with completed profiles.







The screenshot shows a software interface with three tabs: "Enter Individual", "Import from Excel", and "Use Existing Report". The "Use Existing Report" tab is highlighted with a yellow border. Below the tabs, there is a text instruction: "Use the **Search** button to locate existing respondents who have already taken a report." Below this text is a **Note:** "Depending on the report, respondents may still need to answer additional questions." Below the note is a blue "Search" button with a yellow arrow pointing to it from the right.


- When using one completed Everything DiSC Respondent to create a new Everything DiSC or Five Behaviors report, Respondents will not be required to take the DiSC portion of the assessment again. Their previous DiSC style scores will be used in the new report, and only the report-specific questions will be asked.
- When using a completed DiSC Classic report to create an Everything DiSC report, the Respondent name and email address are carried forward, and the Respondent will be able to take the complete Everything DiSC assessment.

EPIC displays a message when one or more of your Respondents qualifies for the Leap Forward credit discount, and the credit deduction is automatically applied:

 *This image is an example only - credit charges vary by product.*


Email		Name	Qty/Cr	View
<input checked="" type="checkbox"/> epicsub1@inscapepublishing.com	Edit	john lyons 	1 (5cr)	No <input type="checkbox"/>
<input checked="" type="checkbox"/> epicsub1@inscapepublishing.com	Edit	Patrick McGivern 	1 (5cr)	Yes <input type="checkbox"/>
<input checked="" type="checkbox"/> epicsub1@inscapepublishing.com	Edit	Sam Telcar 	1 (5cr)	No <input type="checkbox"/>
<input checked="" type="checkbox"/> epicsub1@inscapepublishing.com	Edit	Matt McClure 	1 (5cr)	Yes <input type="checkbox"/>

Total Quantity: 4
Total Credits: 20

 One or more respondent(s) qualifies for credit discount.

9. Respondent List

As you add Respondents using each of the possible ways, EPIC builds a Respondent List.

 *This image is an example only - credit charges vary by product.*

The list below displays the Respondents that will receive an Access Code. To remove a name from the list, click **X**.

Email Address		Name	Quantity	View Report
<input checked="" type="checkbox"/> bob@wiley.com	Edit	Bob	1	Yes
<input checked="" type="checkbox"/> chris@wiley.com	Edit	Chris	1	Yes
<input checked="" type="checkbox"/> leah@wiley.com	Edit	Leah	1	Yes


Total Quantity: 3
Total Credits: 45


Press the "X" at the beginning of a row to delete the Respondent from the list. Press the **Edit** link for a row to edit the email address, then press **Save** to save your changes.

EPIC displays the **Total Quantity** of access codes about to be created, and the **Total Credits** that will be charged during this transaction in EPIC.

10. Press the **Next** button to continue.
11. Create a [custom email subject line and/or message](#) for this set of Access Code emails by pressing **OK**, or press cancel to have EPIC send the default email message. Once you are done creating your custom message, or after you have pressed the **Cancel** button, EPIC displays a confirmation page.

The **confirmation page** displays a summary of the product you just created, the Respondents who will receive an Access Code email, and EPIC credit activity associated with this transaction.

 *This image is an example only - credit charges vary by product.*

Respondents 




The screenshot shows a 'Respondents' section with a 'Show/Hide' toggle and a table of respondents. Below the table is a 'Summary' section.

Email	Name	View	Status
bob@wiley.com	Bob	Yes	Access Code created and email sent.
chris@wiley.com	Chris	Yes	Access Code created and email sent.
leah@wiley.com	Leah	Yes	Access Code created and email sent.

Summary

Total Access Codes Created: **3**

Previous Credit Balance: **1,790**

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.

NOTE: If you added more than 10 Respondents or used the Future Delivery option (Delivery Options for Access Codes), the status column will indicate that the Access Code was created and email has been queued for delivery.

Respondents 



The screenshot shows the 'Respondents' section with a 'Show/Hide' toggle and a table of respondents. The status column now indicates that the access code and email are queued for delivery.

Email	Name	View	Status
bob@wiley.com	Bob	Yes	Access Code created and email queued for delivery.
chris@wiley.com	Chris	Yes	Access Code created and email queued for delivery.
leah@wiley.com	Leah	Yes	Access Code created and email queued for delivery.

Create a Five Behaviors of a Cohesive Team: Demo Experience Report

Use this process to create a new Five Behaviors Powered by DiSC or a Five Behaviors Powered by All Types Demo Experience report.

1. To begin, choose **Manage Reports** ▶ **Create a New Report/Issue Access Codes**


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

Select a Product Family, Product, and Language, then click the **Next** button to continue.

Product Family:	<input type="text" value="- None Selected -"/>
Product:	<input type="text" value="- None Selected -"/>
Language:	<input type="text" value="- None Selected -"/>

Tip: Set your default language at: [View/Edit Account Information](#)

3. Press the **Next** button.
4. **Choose a folder** and/or sub folder in which to create new Access Codes or select the **New Folder** link to create a new 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](#)

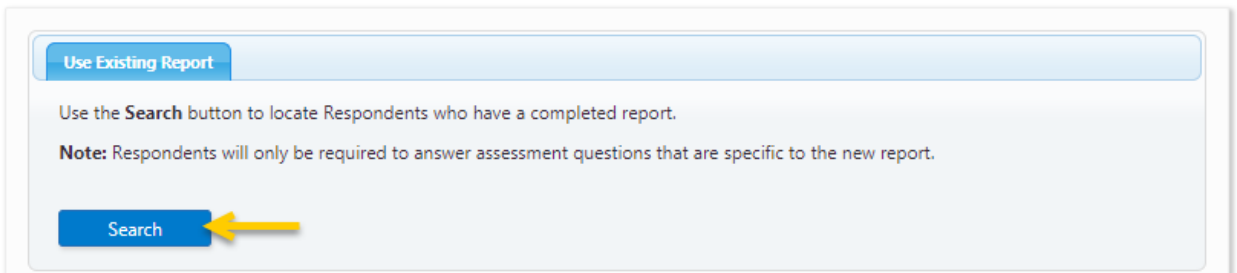
5. Select **Delivery and Auto Reminder Options**
6. **Add Respondents:**

To create a **Five Behaviors Powered by DiSC Demo Experience** report you must select an existing Everything DiSC or existing Five Behaviors Powered by DiSC Individual or Progress report.

Use Existing Report

From the **Use Existing Report** tab, use the **Search** button to search for and select Respondents with completed profiles.

Add Respondents 



Use Existing Report

Use the **Search** button to locate Respondents who have a completed report.

Note: Respondents will only be required to answer assessment questions that are specific to the new report.

Search

- When using a completed Everything DiSC or Five Behaviors report, Respondents will not be required to take the DiSC portion

of the assessment again. Their previous DiSC style scores will be used in the new report, and only the report-specific questions will be asked.

To create a **Five Behaviors Powered by All Types Demo Experience** report you can enter respondents individually or by importing an Excel spreadsheet.

Enter Individual Import from Excel


After entering the Respondent information, click the **Add** button to add the name to the list. Click the **Assign Access Code(s)** button when you're finished adding Respondents.

(Note: If you assign more than 10 Access Codes, they will be queued for delivery and sent out in intervals to avoid being marked as "spam" by the Respondent's email server.)

Email: Name: Quantity: View Report: Yes No

7. Respondent List

As you add Respondents using each of the possible ways, EPIC builds a Respondent List.

 *This image is an example only - credit charges vary by product.*

The list below displays the Respondents that will receive an Access Code. To remove a name from the list, click **X**.


Email		Name	View
X Adam@wiley.com	Edit	Adam Calhoun	Yes ▾
X Claire@wiley.com	Edit	Claire Braxfield	Yes ▾
X Roberta@wiley.com	Edit	Roberta Juarez	Yes ▾

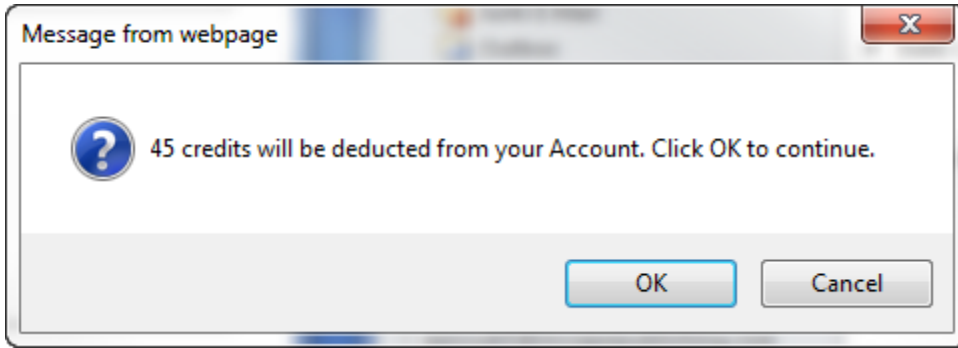
Total Quantity: 3

Press the **"X"** at the beginning of a row to delete the Respondent from the list. Press the **Edit** link for a row to edit the email address, then press **Save** to save your changes.


EPIC displays the **Total Quantity** of access codes about to be created, and the **Total Credits** that will be charged during this transaction in EPIC.


8. **Confirm the credit deduction** by pressing the **OK** button, or press **Cancel** to return to the page you were just on.

 *This image is an example only - credit charges vary by product.*




9. Create a [custom email subject line and/or message](#) for this set of Access Code emails by pressing **OK**, or press cancel to have EPIC send the default email message. Once you are done creating your custom message, or after you have pressed the **Cancel** button, EPIC displays a confirmation page.
10. The **confirmation page** displays a summary of the product you just created, the Respondents who will receive an Access Code email, and EPIC credit activity associated with this transaction.

 *This image is an example only - credit charges vary by product.*

Respondents 

 Show/Hide				
Email	Name	View	Status	
bob@wiley.com	Bob	Yes	Access Code created and email sent.	
chris@wiley.com	Chris	Yes	Access Code created and email sent.	
leah@wiley.com	Leah	Yes	Access Code created and email sent.	

Summary	
Total Access Codes Created:	3
Previous Credit Balance:	1,790

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.

NOTE: If you added more than 10 Respondents or used the Future Delivery option (Delivery Options for Access Codes), the status column will indicate that the Access Code was created and email has been queued for delivery.

Respondents 

 Show/Hide

Email	Name	View	Status
bob@wiley.com	Bob	Yes	Access Code created and email queued for delivery.
chris@wiley.com	Chris	Yes	Access Code created and email queued for delivery.
leah@wiley.com	Leah	Yes	Access Code created and email queued for delivery.

Create Everything DiSC Reports

Choose a product below to see instructions for creating a specific Everything DiSC (ED) product.

Individual Reports

Individual reports are those which are unique to the person completing the assessment. A unique access code is created for each report created, and one person's online assessment responses are used to create the report content.

[ED Workplace](#)

[ED Sales](#)

[ED Management](#)

[ED Work of Leaders](#)

[ED 363 for Leaders](#)

[Productive Conflict](#)

Group, Facilitator and Team Reports

EPIC creates a unique access code for each new group report you create. Group reports are created by adding people with a completed individual report (from those listed above) to a group. These reports can be used to compare different combinations of individuals, and as a group overview.

[ED Work of Leaders Group Report](#)

[ED Work of Leaders Facilitator Report](#)

[ED 363 for Leaders Facilitator Report](#)

[ED Group Culture Report](#)

[ED Facilitator Report](#)

[ED Comparison Report](#)

[ED Team View](#)

Create an Everything DiSC Workplace, Sales, Management, Work of Leaders, or Productive Conflict Report

Use this process to create a new Everything DiSC Workplace, Sales, Management, Work of Leaders or Productive Conflict report by entering individual names and email addresses, by importing a spreadsheet containing the names and email addresses, or by selecting someone with an existing, completed report in your EPIC account.

1. To begin, choose **Manage Reports** ▶ **Create a New Report/Issue Access Codes**
2. **Product Family, Product** and **Language** selections are required before you can continue. Make your selections and press **Next**.

Select a Product Family, Product, and Language, then click the **Next** button to continue.

Product Family:	<input type="text" value="- None Selected -"/>
Product:	<input type="text" value="- None Selected -"/>
Language:	<input type="text" value="- None Selected -"/>

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

3. Choose a **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. **Select Options** for your report(s). 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.
 - Report Sections: displays a list of possible report sections for the chosen product. The example below shows the report sections for ED Workplace:

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

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


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

No page 7 - Overview of DiSC Styles ▼

- See [Manage Report Tailoring](#) to set up or edit product tailoring for a report.
 - **MyEverythingDiSC Options:** Available for Everything DiSC products, with the exception of 363 for Leaders, group and comparison reports.
5. **Choose a folder** and/or sub folder in which to create new Access Codes or select the **New Folder** link to create a new folder.

Folder: [New Folder](#)

Sub Folder: [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](#)

6. Choose **Delivery and Auto Reminder Options**
7. Use one of the three available methods to add Respondents who will receive an Access Code Email to complete their online assessment.
- 8.

1. Enter Individual Respondents

Enter an email address and a name for a Respondent, then press the **Add...** button.

Enter Individual Import from Excel Use Existing Report

After entering the Respondent information, click the **Add Respondent** button to add the name to the list. Click the **Assign Access Codes** button when you're finished adding Respondents.

(Note: If you assign more than 10 Access Codes, they will be queued for delivery and sent out in intervals to avoid being marked as "spam" by the Respondent's email server.)

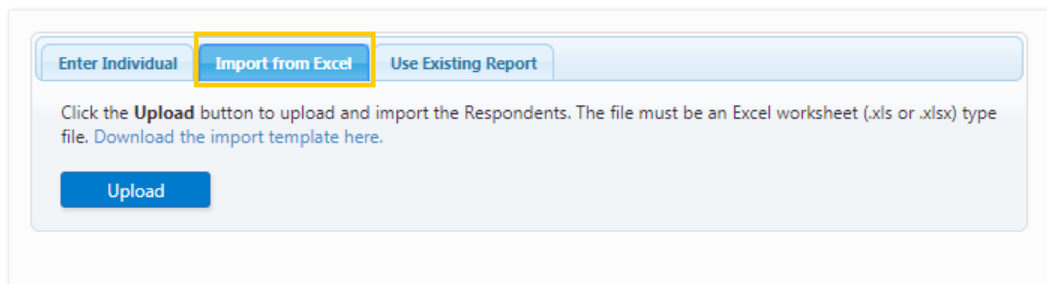
Email Address: Name: Quantity: View Report: Yes No

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


2. Import Respondents **Saver**

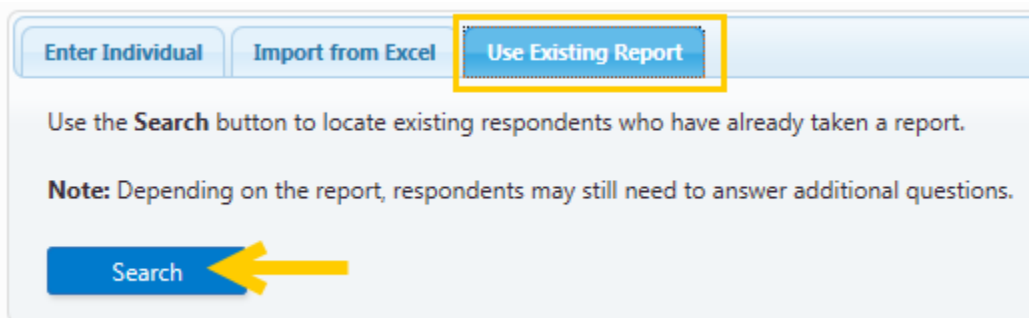
Select the **Import from Excel** tab and upload an Excel spreadsheet of Respondents.

See [Download Import Templates](#) for complete instructions.




3. Use Existing Report

 **Saver** When available, select the **Use Existing Report** tab, then use the **Search** button to search for and select Respondents with completed profiles.



- When using one completed Everything DiSC Respondent to create a new Everything DiSC or Five Behaviors report, Respondents will not be required to take the DiSC portion of the assessment again. Their previous DiSC style scores will be used in the new report, and only the report-specific questions will be asked.
- When using a completed DiSC Classic report to create an Everything DiSC report, the Respondent name and email address are carried forward, and the Respondent will be able to take the complete Everything DiSC assessment.

EPIC displays a message when one or more of your Respondents qualifies for the Leap Forward credit discount, and the credit deduction is automatically applied:

 *This image is an example only - credit charges vary by product.*


Email		Name	Qty/Cr	View
✘ epicsub1@inscapepublishing.com	Edit	John Lyons [!]	1 (5cr)	No <input type="checkbox"/>
✘ epicsub1@inscapepublishing.com	Edit	Patrick McGivern [!]	1 (5cr)	Yes <input type="checkbox"/>
✘ epicsub1@inscapepublishing.com	Edit	Sam Telcar [!]	1 (5cr)	No <input type="checkbox"/>
✘ epicsub1@inscapepublishing.com	Edit	Matt McClure [!]	1 (5cr)	Yes <input type="checkbox"/>

Total Quantity: 4
Total Credits: 20

[!] One or more respondent(s) qualifies for credit discount.

9. Respondent List

As you add Respondents using each of the possible ways, EPIC builds a Respondent List.

 *This image is an example only - credit charges vary by product.*

The list below displays the Respondents that will receive an Access Code. To remove a name from the list, click ✘.


Email Address		Name	Quantity	View Report
✘ bob@wiley.com	Edit	Bob	1	Yes
✘ chris@wiley.com	Edit	Chris	1	Yes
✘ leah@wiley.com	Edit	Leah	1	Yes

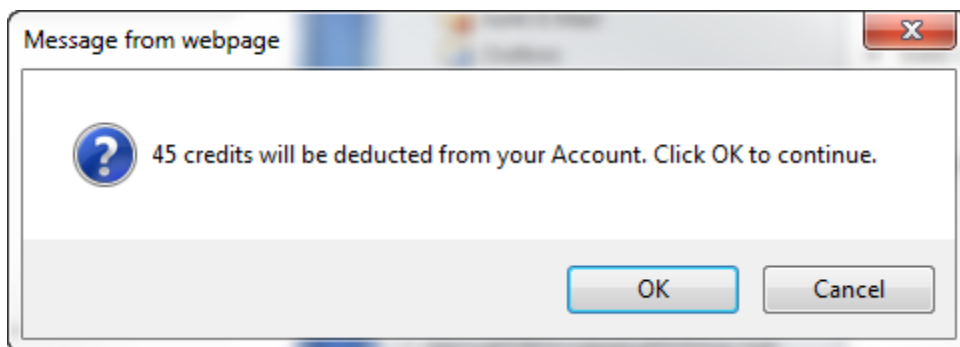
Total Quantity: 3
Total Credits: 45

Press the "✘" at the beginning of a row to delete the Respondent from the list. Press the **Edit** link for a row to edit the email address, then press **Save** to save your changes.

EPIC displays the **Total Quantity** of access codes about to be created, and the **Total Credits** that will be charged during this transaction in EPIC.


10. Press the **Assign Access Codes** button to continue.
11. **Confirm the credit deduction** by pressing the **OK** button, or press **Cancel** to return to the page you were just on.


 *This image is an example only - credit charges vary by product.*




12. Create a [custom email subject line and/or message](#) for this set of Access Code emails by pressing **OK**, or press cancel to have EPIC send the default email message. Once you are done creating your custom message, or after you have pressed the **Cancel** button, EPIC displays a confirmation page.

The **confirmation page** displays a summary of the product you just created, the Respondents who will receive an Access Code email, and EPIC credit activity associated with this transaction.


 *This image is an example only - credit charges vary by product.*

Respondents 

Show/Hide		Name	View	Status
Email				
	bob@wiley.com	Bob	Yes	Access Code created and email sent.
	chris@wiley.com	Chris	Yes	Access Code created and email sent.
	leah@wiley.com	Leah	Yes	Access Code created and email sent.
Summary				
Total Access Codes Created:	3			
Previous Credit Balance:	1,790			

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.

NOTE: If you added more than 10 Respondents or used the Future Delivery option (Delivery Options for Access Codes), the status column will indicate that the Access Code was created and email has been queued for delivery.

Respondents 

 Show/Hide

Email	Name	View	Status
bob@wiley.com	Bob	Yes	Access Code created and email queued for delivery.
chris@wiley.com	Chris	Yes	Access Code created and email queued for delivery.
leah@wiley.com	Leah	Yes	Access Code created and email queued for delivery.




Create a Group, Team or Facilitator Report

Use the steps below to create any of the following reports in EPIC.

Everything DiSC Reports:	DiSC Classic Reports:
<ul style="list-style-type: none">• ED Work of Leaders Group Report• ED Work of Leaders Facilitator Report• ED Group Culture Report• ED Facilitator Report• ED Team View	<ul style="list-style-type: none">• DiSC Classic Group Culture Report• DiSC Classic Facilitator Report• DiSC Classic Team View

1. To begin, choose **Manage Reports** ▶ **Create a New Report/Issue Access Codes**
2. **Product Family**, **Product** and **Language** selections are required before you can continue. Make your selections and press **Next**.

Select a Product Family, Product, and Language, then click the **Next** button to continue.


Product Family:	<input type="text" value="- None Selected -"/>	
Product:	<input type="text" value="- None Selected -"/>	
Language:	<input type="text" value="- None Selected -"/>	

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

3. **Choose a folder** and/or sub folder in which to create new Access Codes or select the **New Folder** link to create a new folder.

Folder: [New Folder](#)

Sub Folder: [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](#)

4. Enter a **Report Name** for products with this option. The report name does not appear on the cover of the report, but can be very useful to you later if you want to search for the report to edit or print it. Report Names can be changed in EPIC while editing the report.

Report Name:

5. Press the **Add** button to begin adding participants to the report.

Participants

Use the **Search** function to locate and select people to add to the report.


As you select participants, EPIC creates a list in the Participants section. You can continue to use the **Add** button to add participants, and you can press the "X" for any participant to remove them from the list.

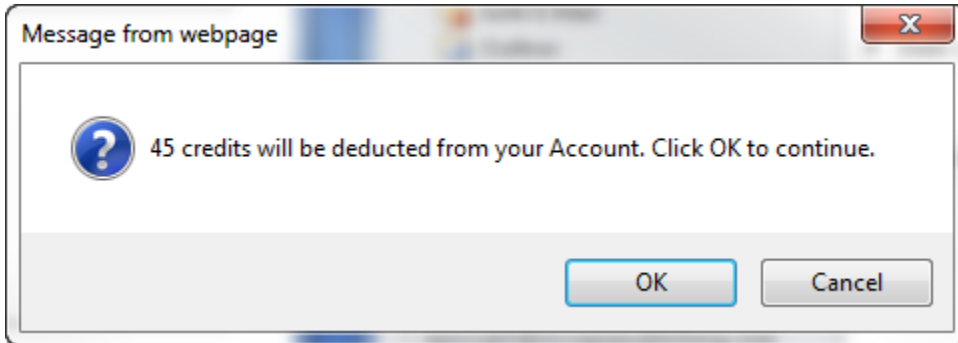
Participants 

Email	Name
<input type="checkbox"/> epicsub4@inscapepublishing.com	Joan Avery
<input type="checkbox"/> epicsub1@inscapepublishing.com	Bob McMater
<input type="checkbox"/> epicsub3@inscapepublishing.com	Annie Ghound


6. Press the **Next** button.

7. **Confirm the credit deduction** by pressing the **OK** button, or press **Cancel** to return to the page you were just on.

 *This image is an example only - credit charges vary by product.*



The **confirmation screen** displays a summary of the product you just created and EPIC credits charged for creation of the report.

Press the plus sign  to the left of the **Show/Hide Report Participants** link to view the list of Participants included in the report.

Report Participants

Email	Name	Product
epicsub3@inscapepublishing.com	Annie Gshould	Everything DiSC Wc
epicsub1@inscapepublishing.com	Bob McMater	Everything DiSC Wc
epicsub4@inscapepublishing.com	Joan Avery	Everything DiSC Wc



Press the **View/Print/Email Report** button to generate a PDF version of the report, or press the **Edit this report again** button to make changes to this report.

Create an Everything DiSC 363 for Leaders Report

Use this process to create a new Everything DiSC 363 for Leaders report for either a new Leader or one who has already completed a profile in your EPIC account. You can add Raters for a leader by entering individual names and

email addresses or by importing a spreadsheet containing the names and email addresses.

1. To begin, choose **Manage Reports** ▶ **Create a New Report/Issue Access Codes**
2. **Product Family, Product** and **Language** selections are required before you can continue. Make your selections and press **Next**.

Select a Product Family, Product, and Language, then click the **Next** button to continue.

Product Family:	<input type="text" value="- None Selected -"/>
Product:	<input type="text" value="- None Selected -"/>
Language:	<input type="text" value="- None Selected -"/>

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

3. Choose a **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. **Select Options** for your report(s). 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.
 - Report Sections: displays a list of possible report sections for the chosen product. The example below shows the report sections for ED Workplace:

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

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

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


No page 7 - Overview of DiSC Styles 

- See [Manage Report Tailoring](#) to set up or edit product tailoring for a report.
- **MyEverythingDiSC Options:** Available for Everything DiSC products, with the exception of 363 for Leaders, group and comparison reports.

5. **Choose a folder** and/or sub folder in which to create new Access Codes or select the **New Folder** link to create a new folder.


Folder:  [New Folder](#)


Sub Folder:  [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](#)

6. Choose **Delivery and Auto Reminder Options**
7. Use one of two methods to add the Leader for this report. You can (1) Enter a name and email address for the Leader, or (2) press the **Use an existing report as the Leader** link to search for and select a person with a completed Everything DiSC report in your EPIC account.

Add Leader 

Email: Name: Gender: 

 [Use an existing report as the Leader](#)

8. **Add Raters** by either entering information for individual Raters, or by using the **Import from Excel** tab to import a spreadsheet of raters.

What are the Rules for Adding Raters?

The Everything DiSC 363 for Leaders profile divides raters into 4 categories: **Manager**, **Peer/Coworker**, **Direct Report**, and **Other**. If you use one of these categories when assigning access codes, a minimum number of Raters in the category need to respond before the

report can be generated. You do not need to have the minimum number in each category to assign the access codes since Raters can be added at a later date using the Edit function. The current minimums are:

- Manager: 1
- Peer: 2
- Direct Report: 2
- Other: 2

(Note: You do not need to use all of the rater categories)

When you retrieve a report for printing (View/Print/Email), EPIC checks the minimum rater requirements. If the minimum number of Raters have not completed responding, the Report Status icon will be displayed. Click on the Report Status link to determine why the report cannot be generated.




[Report Status](#)

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 function to change the rater category for a rater or use the Include function to temporarily remove the rater's response from the report.

Import Raters  **Saver**

Press the **Import from Excel** tab and upload an Excel spreadsheet of Respondents.

See [Download Import Templates](#) for complete instructions.

Add Raters 

Enter Individual **Import from Excel**

Click the **Browse** button to locate your import file. The file must be an Excel worksheet (.xls or .xlsx) type file. After selecting the file, click the **Upload** button to upload and import the Raters. [Download the import template here.](#)

Rater List

As you add Raters using each of the possible ways, EPIC builds a Rater List.

The list below displays the Raters that will receive an Access Code. To remove a name from the list, click ✕.


Email		Name	Rater Type
✕ bob@wiley.com	Edit	Bob	Direct Report
✕ chris@wiley.com	Edit	Chris	Direct Report
✕ leah@wiley.com	Edit	Leah	Manager

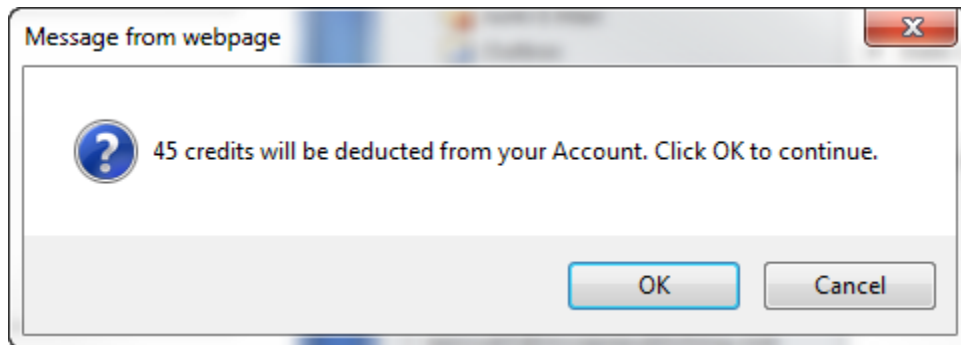
Total Rater Quantity: 3

Press the "X" at the beginning of a row to delete the Rater from the list. Press the **Edit** link for a row to edit the email address, then press **Save** to save your changes.

EPIC displays the **Total Rater Quantity** at the bottom of the list.


9. Press the **Next** button to continue.
10. **Confirm the credit deduction** by pressing the **OK** button, or press **Cancel** to return to the page you were just on.

 *This image is an example only - credit charges vary by product.*



11. Create a [custom email subject line and/or message](#) for this set of Access Code emails by pressing **OK**, or press cancel to have EPIC send the default email message. Once you are done creating your custom message, or after you have pressed the **Cancel** button, EPIC displays a confirmation page.


The **confirmation page** displays a summary of the product you just created, the Leader and Raters who will receive an Access Code email, and EPIC credit activity associated with this transaction.

Leader 

Email	Name	Gender	Assigned	Status
joseph@wiley.com	Joseph	Male	11/5/2015	Access Code created and email sent.

In the **Added Raters** section, press the plus sign \boxplus to the left of the **Show/Hide** link to open the section and view the list of Raters. The **Status** column shows Access Code creation and email delivery information.

Added Raters 

 Show/Hide			
Email	Name	Rater Type	Status
bob@wiley.com	Bob	Direct Report	Access Code created and email sent.
chris@wiley.com	Chris	Direct Report	Access Code created and email sent.
leah@wiley.com	Leah	Manager	Access Code created and email sent.

Raters

Total Rater Access Codes Created: 3

Previous Credit Balance: 965

Total Credits Charged: 50

New Credit Balance: 865

NOTE: If you added more than 9 Raters or used the Future Delivery option (Delivery Options for Access Codes), the status column will indicate that the Access Code was created and email has been queued for delivery.

Create an Everything DiSC 363 for Leaders Facilitator Report

1. To begin, choose **Manage Reports** \triangleright **Create a New Report/Issue Access Codes**
2. In the **Report Options** section, choose which sections of the report you wish to exclude by unchecking

Report Options

Check a box to display an option in the report.


[Check All](#) | [Uncheck All](#)

- Introduction
- Group Summary
- Strengths & Challenges
- Data by Rater
- Data by Item
- Leader Snapshots

boxes.

3. **Choose a folder** and/or sub folder in which to create new Access Codes or select the **New Folder** link to create a new folder.

Folder:	<input type="text" value="- None Selected -"/>	New Folder
Sub Folder:	<input type="text" value="- None Selected -"/>	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](#)

4. Enter a **Report Name** for products with this option. The report name does not appear on the cover of the report, but can be very useful to you later if you want to search for the report to edit or print it. Report Names can be changed in EPIC while editing the report.

Report Name:	<input type="text" value="HR Workgroup"/>
--------------	---

5. Add a minimum of two (2) completed ED 363 Leader reports to create the ED 363 for Leaders Facilitator report.

Press the **Add** button to begin adding participants to the report.

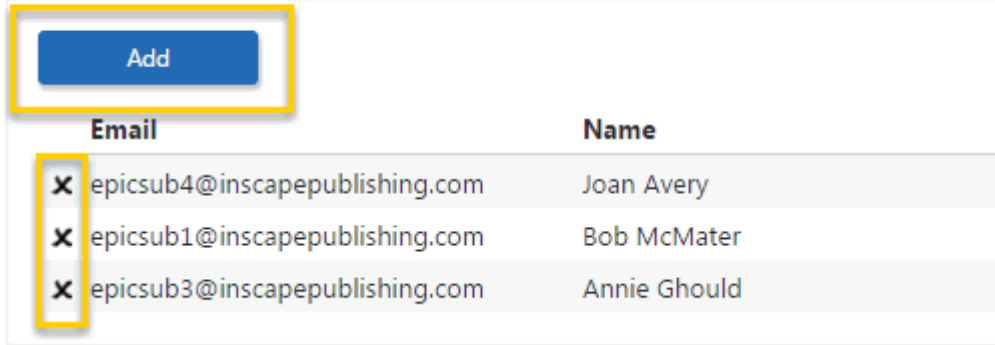
Participants

<input type="button" value="Add"/>

Use the **Search** function to locate and select people to add to the report.


As you select participants, EPIC creates a list in the Participants section. You can continue to use the **Add** button to add participants, and you can press the "X" for any participant to remove them from the list.

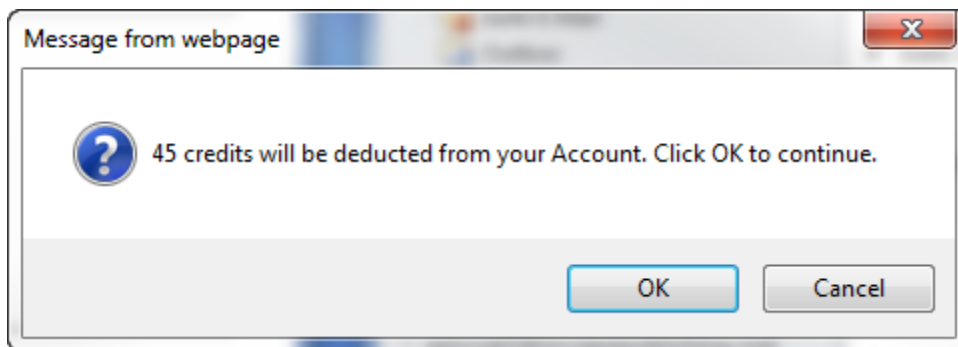
Participants ?




	Email	Name
X	epicsub4@inscapepublishing.com	Joan Avery
X	epicsub1@inscapepublishing.com	Bob McMater
X	epicsub3@inscapepublishing.com	Annie Gshould

6. Press the **Next** button.
7. **Confirm the credit deduction** by pressing the **OK** button, or press **Cancel** to return to the page you were just on.

 *This image is an example only - credit charges vary by product.*



The **confirmation screen** displays a summary of the product you just created and EPIC credits charged for creation of the report.

Press the plus sign  to the left of the **Show/Hide Report Participants** link to view the list of Participants included in the report.

Report Participants


Email	Name	Product
epicsub3@inscapepublishing.com	Annie Gshould	Everything DiSC Wc
epicsub1@inscapepublishing.com	Bob McMater	Everything DiSC Wc
epicsub4@inscapepublishing.com	Joan Avery	Everything DiSC Wc



Press the **View/Print/Email Report** button to generate a PDF version of the report, or press the **Edit this report again** button to make changes to this report.

Create an Everything DiSC Comparison Report

Use the steps below to create a comparison between two (2) individuals.

 **Saver** If you wish to create many comparison reports between many individuals at one time, do not use the steps below, but instead use the tool under Manage Reports ▶ Batch Functions called **Create/Generate Comparison Reports**.

Steps for creating a Comparison Report between two (2) individuals:

1. To begin, choose **Manage Reports ▶ Create a New Report/Issue Access Codes**
2. **Product Family, Product** and **Language** selections are required before you can continue. Make your selections and press **Next**.

Select a Product Family, Product, and Language, then click the **Next** button to continue.

Product Family:	<input type="text" value="- None Selected -"/>
Product:	<input type="text" value="- None Selected -"/>
Language:	<input type="text" value="- None Selected -"/>

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

3. Press the **Add** button to begin adding participants to the report.

Participants



Use the **Search** function to locate and select people to add to the report.

As you select participants, EPIC creates a list in the Participants section. You can continue to use the **Add** button to add participants, and you can press the "X" for any participant to remove them from the list.

Participants ?



4. Press the **Next** button.
5. EPIC charges zero (0) credits for this report. Press the **OK** button to continue.

The **confirmation screen** displays a summary of the product you just created and EPIC credits charged for creation of the report.

Press the plus sign \oplus to the left of the **Show/Hide Report Participants** link to view the list of Participants included in the report.

Report Participants

Email	Name	Product
epicsub3@inscapepublishing.com	Annie Gshould	Everything DiSC Wc
epicsub1@inscapepublishing.com	Bob McMater	Everything DiSC Wc
epicsub4@inscapepublishing.com	Joan Avery	Everything DiSC Wc

[View/Print/Email Report](#) [Edit this report again](#)

Press the **View/Print/Email Report** button to generate a PDF version of the report, or press the **Edit this report again** button to make changes to this report.

Create DiSC Classic Reports

Choose a product below to see instructions for creating a specific DiSC Classic product.

Individual Reports

Individual reports are those which are unique to the person completing the assessment. A unique access code is created for each report created, and one person's online assessment responses or Tally Box Scores are used to create the report content.

[DiSC Classic 1.0](#)

[DiSC Classic 2.0](#)

[DiSC Classic 2 Plus](#)

[DiSC PPSS General Characteristics](#)

Group, Facilitator and Team Reports

EPIC creates a unique access code for each new group report you create. Group reports are created by adding people with a completed individual report (from those listed above) to a group. These reports can be used to compare different combinations of individuals, and as a group overview.

[DiSC Classic Group Culture Report](#)

[DiSC Classic Facilitator Report](#)

[DiSC Classic Team View](#)

Create DiSC Classic 1.0 and DiSC Classic 2.0 Reports

You can create new reports by entering individual names and email addresses, by importing a spreadsheet containing the names and email addresses, or by selecting someone with an existing, completed report in your EPIC account. This set of steps results in an Access Code email to the Respondents containing a link to an online assessment.

To see instruction for creating DiSC Classic reports by entering Tally Box Scores, click [here](#).

Create New Reports and Send Online Assessment Emails to Respondents

1. To begin, choose **Manage Reports** ▶ **Create a New Report/Issue Access Codes**

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

Select a Product Family, Product, and Language, then click the **Next** button to continue.

Product Family:	<input type="text" value="- None Selected -"/>
Product:	<input type="text" value="- None Selected -"/>
Language:	<input type="text" value="- None Selected -"/>

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

3. Choose a **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. Select **Report Options, Report Version** (when available), and **Response Style** for this set of reports.

In the **Report Options** section, you can include [Graphs 1 and 2 and Tally Box Scores](#) when this feature has been enabled by your Authorized Partner.

For some DiSC Classic reports, you will see the **Report Version** section, where you can choose to have EPIC default to the Full Report or a Short version of the Report when you generate the report for viewing/printing. You are able to override this default setting each time you generate the report, so there is no wrong choice.

Report Options

Check a box to display an option in the report.

[Check All](#) | [Uncheck All](#)

- Graphs 1 and 2
- Tally Box Scores

Report Version

Choose the Report Version you would like to use when the report generates.

- Full Report
- Short Report

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?](#)

In the **Response Style** section, you can choose to present the Respondents with either a Word Version or Phrase Version of the online assessment.

What's the difference between Word version and Phrase version?

There are two response style options for DiSC Classic 1, DiSC Classic 2.0, DiSC Classic 2 Plus and DiSC PPSS.

Word Version - The respondent is presented with four words from which he/she chooses one that is "Most Like Me" and one that is "Least Like Me"

Phrase Version - The respondent is presented with four phrases from which he/she chooses one that is "Most Like Me" and one that is "Least Like Me"


The phrase response option allows you to bring DiSC to a broader range of learners. Written at a sixth-grade reading level, the phrase responses provide an alternative to the traditional word response format.

When assigning access codes for *DiSC Classic 1.0*, *DiSC Classic 2.0*, *DiSC Classic 2 Plus* or *DiSC PPSS*, you'll have an option to "Select a Response Style for the report" on the Select Report Features screen. If you'd like the respondent to have the word version, leave the response style on the default "Word Version." If you want the respondent to have the phrase version, simply select "Phrase Version."

Both the word or phrase response version will produce the same *DiSC Classic 1.0*, *DiSC Classic 2.0*, *DiSC Classic 2 Plus* or *DiSC PPSS* report and both response style reports can be used when generating group or comparison reports.

5. **Choose a folder** and/or sub folder in which to create new Access Codes or select the **New Folder** link to create a new folder.

Folder:	<input type="text" value="- None Selected -"/>	New Folder
Sub Folder:	<input type="text" value="- None Selected -"/>	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](#)

6. Select **Delivery and Auto Reminder Options**
7. Use one of the three available methods to add Respondents who will receive an Access Code Email to complete their online assessment.


Enter Individual Respondents

Enter an email address and a name for a Respondent, then press the **Add...** button.

[Enter Individual](#) [Import from Excel](#) [Use Existing Report](#)

After entering the Respondent information, click the **Add Respondent** button to add the name to the list. Click the **Assign Access Codes** button when you're finished adding Respondents.

(Note: If you assign more than 10 Access Codes, they will be queued for delivery and sent out in intervals to avoid being marked as "spam" by the Respondent's email server.)

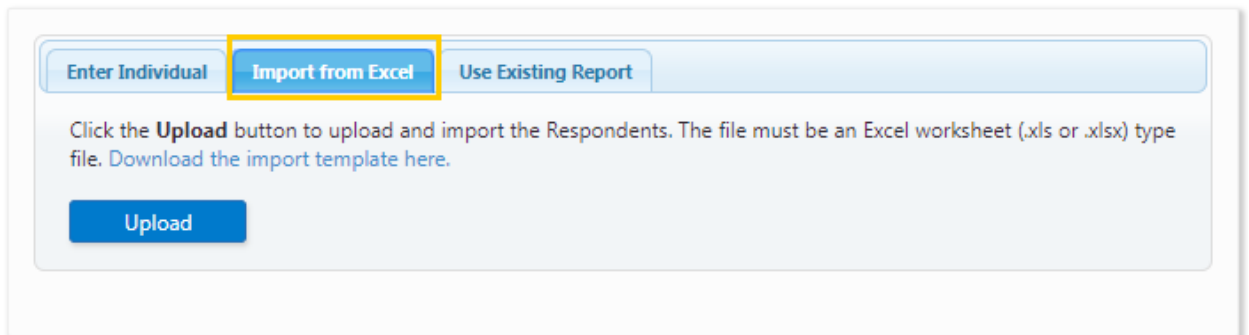
Email Address: Name: Quantity: View Report: Yes No [Add](#) 

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

Import Respondents Saver


Select the **Import from Excel** tab and upload an Excel spreadsheet of Respondents.

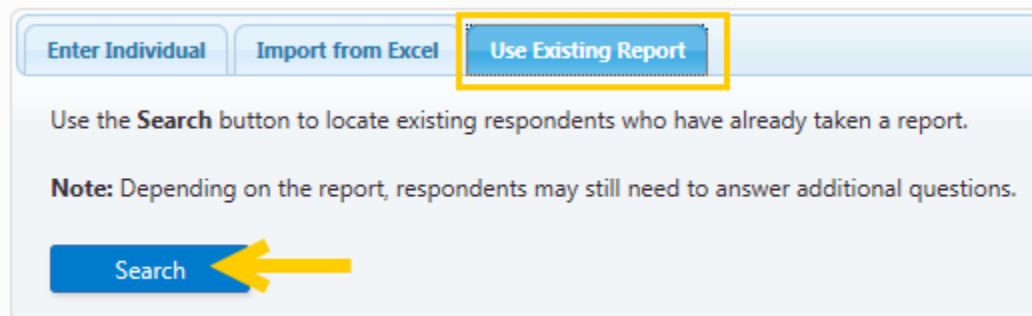
See [Download Import Templates](#) for complete instructions.



The screenshot shows a web interface with three tabs: "Enter Individual", "Import from Excel", and "Use Existing Report". The "Import from Excel" tab is selected and highlighted with a yellow border. Below the tabs, there is a text instruction: "Click the **Upload** button to upload and import the Respondents. The file must be an Excel worksheet (.xls or .xlsx) type file. Download the import template here." Below this text is a blue "Upload" button.

Use Existing Report

 Saver When available, select the **Use Existing Report** tab, then use the **Search** button to search for and select Respondents with completed profiles.




The screenshot shows a web interface with three tabs: "Enter Individual", "Import from Excel", and "Use Existing Report". The "Use Existing Report" tab is selected and highlighted with a yellow border. Below the tabs, there is a text instruction: "Use the **Search** button to locate existing respondents who have already taken a report." Below this text is a "Note": "Note: Depending on the report, respondents may still need to answer additional questions." Below the note is a blue "Search" button with a yellow arrow pointing to it from the right.

- When using a completed DiSC Classic report to create an Everything DiSC report, the Respondent name and email address are carried forward, and the Respondent will be able to take the complete Everything DiSC assessment.

Respondent List

As you add Respondents using each of the possible ways, EPIC builds a Respondent List.

 *This image is an example only - credit charges vary by product.*

The list below displays the Respondents that will receive an Access Code. To remove a name from the list, click **X**.


Email Address		Name	Quantity	View Report
X bob@wiley.com	Edit	Bob	1	Yes
X chris@wiley.com	Edit	Chris	1	Yes
X leah@wiley.com	Edit	Leah	1	Yes

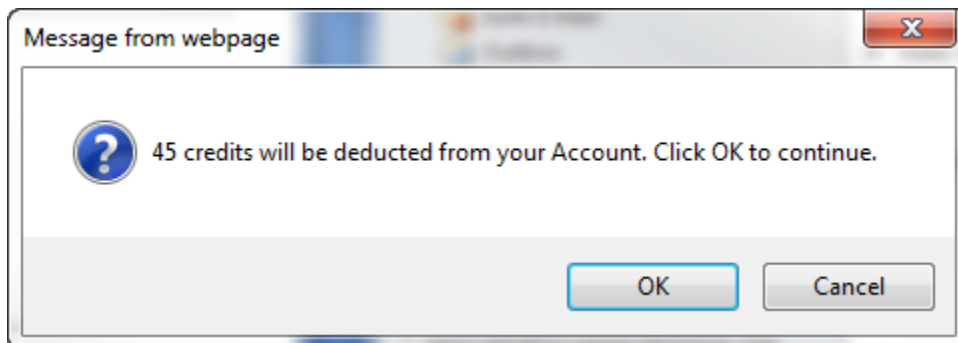
Total Quantity: 3
Total Credits: 45

Press the "**X**" at the beginning of a row to delete the Respondent from the list. Press the **Edit** link for a row to edit the email address, then press **Save** to save your changes.

EPIC displays the **Total Quantity** of access codes about to be created, and the **Total Credits** that will be charged during this transaction in EPIC.


8. Press the **Assign Access Code(s)** button.
9. **Confirm the credit deduction** by pressing the **OK** button, or press **Cancel** to return to the page you were just on.

 *This image is an example only - credit charges vary by product.*



10. Create a **custom email subject line and/or message** for this set of Access Code emails by pressing **OK**, or press cancel to have EPIC send the default email message. Once you are done creating your custom message, or after you have pressed the **Cancel** button, EPIC displays a confirmation page.

The **confirmation page** displays a summary of the product you just created, the Respondents who will receive an Access Code email, and EPIC credit activity associated with this transaction.

 *This image is an example only - credit charges vary by product.*

Respondents ?

Show/Hide				
Email	Name	View	Status	
bob@wiley.com	Bob	Yes	Access Code created and email sent.	
chris@wiley.com	Chris	Yes	Access Code created and email sent.	
leah@wiley.com	Leah	Yes	Access Code created and email sent.	

Summary	
Total Access Codes Created:	3
Previous Credit Balance:	1,790

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.

NOTE: If you added more than 10 Respondents or used the Future Delivery option (Delivery Options for Access Codes), the status column will indicate that the Access Code was created and email has been queued for delivery.

Respondents ?

Show/Hide				
Email	Name	View	Status	
bob@wiley.com	Bob	Yes	Access Code created and email queued for delivery.	
chris@wiley.com	Chris	Yes	Access Code created and email queued for delivery.	
leah@wiley.com	Leah	Yes	Access Code created and email queued for delivery.	

Create DiSC Classic 2 Plus Reports

You can create new reports by entering individual names and email addresses, by importing a spreadsheet containing the names and email addresses, or by selecting someone with an existing, completed report in your EPIC account. This set of steps results in an Access Code email to the Respondents containing a link to an online assessment.

To see instruction for creating DiSC Classic reports by entering Tally Box Scores, click here.

Create New Reports and Send Online Assessment Emails to Respondents

1. To begin, choose **Manage Reports** ▶ **Create a New Report/Issue Access Codes**
2. **Product Family**, **Product** and **Language** selections are required before you can continue. Make your selections and press **Next**.

Select a Product Family, Product, and Language, then click the **Next** button to continue.

Product Family:	<input type="text" value="- None Selected -"/>
Product:	<input type="text" value="- None Selected -"/>
Language:	<input type="text" value="- None Selected -"/>

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

3. Choose a **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. Select **Report Options**, **Response Style**, and **Supplemental Reports** for the reports you are creating.

In the **Report Options** section, check the boxes for the sections of the report you would like to be included in generated reports by default. You are able to override this default setting each time you generate the report, so there is no wrong choice.

In the **Response Style** section, you can choose to present the Respondents with either a Word Version or Phrase Version of the online assessment.

What's the difference between Word version and Phrase version?

There are two response style options for DiSC Classic 1, DiSC Classic 2.0, DiSC Classic 2 Plus and DiSC PPSS.

Word Version - The respondent is presented with four words from which he/she chooses one that is "Most Like Me" and one that is "Least Like Me"

Phrase Version - The respondent is presented with four phrases from which he/she chooses one that is "Most Like Me" and one that is "Least Like Me"

The phrase response option allows you to bring DiSC to a broader range of learners. Written at a sixth-grade reading level, the phrase responses provide an alternative to the traditional word response format.

When assigning access codes for *DiSC Classic 1.0*, *DiSC Classic 2.0*, *DiSC Classic 2 Plus* or *DiSC PPSS*, you'll have an option to "Select a Response Style for the report" on the Select Report Features screen. If you'd like the respondent to have the word version, leave the response style on the default "Word Version." If you want the respondent to have the phrase version, simply select "Phrase Version."

Both the word or phrase response version will produce the same *DiSC Classic 1.0*, *DiSC Classic 2.0*, *DiSC Classic 2 Plus* or *DiSC PPSS* report and both response style reports can be used when generating group or comparison reports.

Report Options

Check a box to display an option in the report.

[Check All](#) | [Uncheck All](#)

- DiSC Classic 2 Report
- Graphs 1 and 2
- Tally Box Scores
- Worksheets (if supplemental reports are included)

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?](#)

Supplemental Reports for DiSC Classic 2 Plus will be added to the end of the report. You are able to add additional reports at any time, so if you are going to allow this set of Respondents to view their report online once they complete the assessment, be sure to only include the Supplemental Reports you wish them to see at this time.

Supplemental Reports

Check a box to include a Supplemental Report.

Note: You can add additional Supplemental Reports at any time without incurring additional costs, so be sure to select only those Supplemental Reports that will be meaningful to this individual.


[Check All](#) | [Uncheck All](#)

- Strategies for Creating a Positive Relationship
- Relating to People and the Environment
- Strategies for Managing
- Approach to Managing Others
- Strategies for Sales Management
- Approach to Selling

5. **Choose a folder** and/or sub folder in which to create new Access Codes or select the **New Folder** link to create a new folder.

Folder: [New Folder](#)

Sub Folder: [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](#)

6. Select **Delivery and Auto Reminder Options**
7. Use one of the three available methods to add Respondents who will receive an Access Code Email to complete their online assessment.


Enter Individual Respondents

Enter an email address and a name for a Respondent, then press the **Add...** button.

Enter Individual | [Import from Excel](#) | [Use Existing Report](#)

After entering the Respondent information, click the **Add Respondent** button to add the name to the list. Click the **Assign Access Codes** button when you're finished adding Respondents.

(Note: If you assign more than 10 Access Codes, they will be queued for delivery and sent out in intervals to avoid being marked as "spam" by the Respondent's email server.)

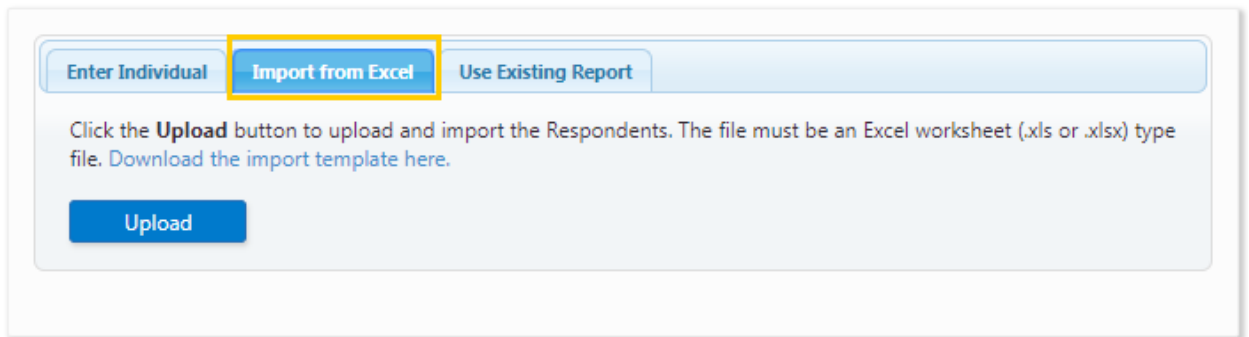
Email Address: Name: Quantity: View Report: Yes No [Add](#) 

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

Import Respondents Saver

Select the **Import from Excel** tab and upload an Excel spreadsheet of Respondents.

See [Download Import Templates](#) for complete instructions.




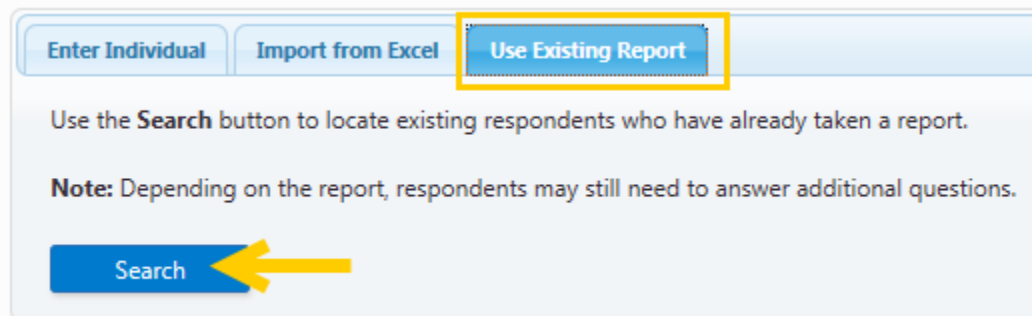
Enter Individual **Import from Excel** Use Existing Report

Click the **Upload** button to upload and import the Respondents. The file must be an Excel worksheet (.xls or .xlsx) type file. Download the import template here.

Upload

Use Existing Report

 Saver When available, select the **Use Existing Report** tab, then use the **Search** button to search for and select Respondents with completed profiles.



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

Use the **Search** button to locate existing respondents who have already taken a report.


Note: Depending on the report, respondents may still need to answer additional questions.

Search

- When using a completed DiSC Classic report to create an Everything DiSC report, the Respondent name and email address are carried forward, and the Respondent will be able to take the complete Everything DiSC assessment.

Respondent List

As you add Respondents using each of the possible ways, EPIC builds a Respondent List.

 *This image is an example only - credit charges vary by product.*

The list below displays the Respondents that will receive an Access Code. To remove a name from the list, click **X**.


Email Address		Name	Quantity	View Report
X bob@wiley.com	Edit	Bob	1	Yes
X chris@wiley.com	Edit	Chris	1	Yes
X leah@wiley.com	Edit	Leah	1	Yes

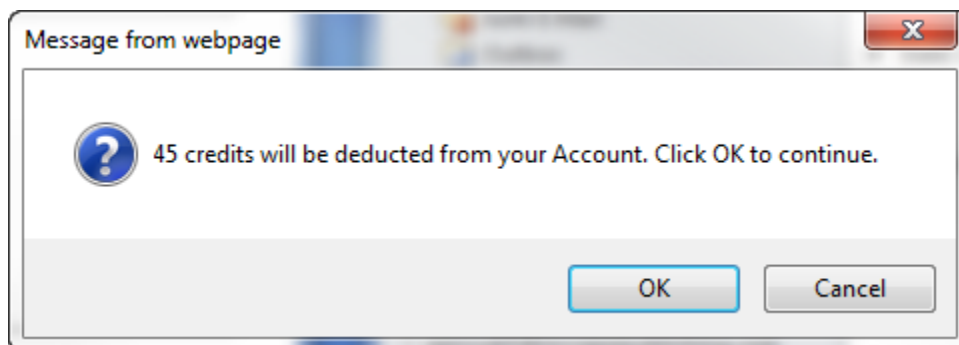
Total Quantity: 3
Total Credits: 45

Press the "**X**" at the beginning of a row to delete the Respondent from the list. Press the **Edit** link for a row to edit the email address, then press **Save** to save your changes.

EPIC displays the **Total Quantity** of access codes about to be created, and the **Total Credits** that will be charged during this transaction in EPIC.


8. Press the **Assign Access Code(s)** button.
9. **Confirm the credit deduction** by pressing the **OK** button, or press **Cancel** to return to the page you were just on.


 *This image is an example only - credit charges vary by product.*

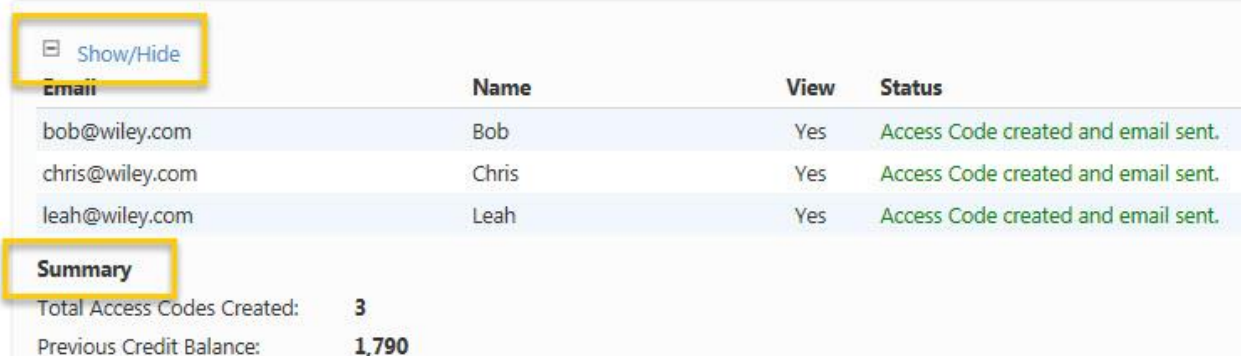


10. Create a **custom email subject line and/or message** for this set of Access Code emails by pressing **OK**, or press cancel to have EPIC send the default email message. Once you are done creating your custom message, or after you have pressed the **Cancel** button, EPIC displays a confirmation page.

The **confirmation page** displays a summary of the product you just created, the Respondents who will receive an Access Code email, and EPIC credit activity associated with this transaction.

 *This image is an example only - credit charges vary by product.*

Respondents 




Email	Name	View	Status
bob@wiley.com	Bob	Yes	Access Code created and email sent.
chris@wiley.com	Chris	Yes	Access Code created and email sent.
leah@wiley.com	Leah	Yes	Access Code created and email sent.


Summary

Total Access Codes Created: 3

Previous Credit Balance: 1,790

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.

NOTE: If you added more than 10 Respondents or used the Future Delivery option (Delivery Options for Access Codes), the status column will indicate that the Access Code was created and email has been queued for delivery.

Respondents 



Email	Name	View	Status
bob@wiley.com	Bob	Yes	Access Code created and email queued for delivery.
chris@wiley.com	Chris	Yes	Access Code created and email queued for delivery.
leah@wiley.com	Leah	Yes	Access Code created and email queued for delivery.

Create DiSC PPSS General Characteristics Reports

You can create new reports by entering individual names and email addresses, by importing a spreadsheet containing the names and email addresses, or by selecting someone with an existing, completed report in your EPIC account. This set of steps results in an Access Code email to the Respondents containing a link to an online assessment.

To see instruction for creating DiSC Classic reports by entering Tally Box Scores, click [here](#).

Create New Reports and Send Online Assessment Emails to Respondents

1. To begin, choose **Manage Reports** ▶ **Create a New Report/Issue Access Codes**
2. **Product Family, Product** and **Language** selections are required before you can continue. Make your selections and press **Next**.

Select a Product Family, Product, and Language, then click the **Next** button to continue.

Product Family:	<input type="text" value="- None Selected -"/>	▼
Product:	<input type="text" value="- None Selected -"/>	▼
Language:	<input type="text" value="- None Selected -"/>	▼

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

3. Choose a **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. Select **Report Options, Graph Style, Response Style,** and **Supplemental Reports** for the reports you are creating.

In the **Report Options** section, check the boxes for the sections of the report you would like to be included in generated reports by default. You are able to override this default setting each time you generate the report, so there is no wrong choice.

In the **Graph Style** section, choose which style of chart/graph you would like to include.

In the **Response Style** section, you can choose to present the Respondents with either a Word Version or Phrase Version of the online assessment.

What's the difference between Word version and Phrase version?

There are two response style options for DiSC Classic 1, DiSC Classic 2.0, DiSC Classic 2 Plus and DiSC PPSS.

Word Version - The respondent is presented with four words from which he/she chooses one that is "Most Like Me" and one that is "Least Like Me"

Phrase Version - The respondent is presented with four phrases from which he/she chooses one that is "Most Like Me" and one that is "Least Like Me"

The phrase response option allows you to bring DiSC to a broader range of learners. Written at a sixth-grade reading level, the phrase responses provide an alternative to the traditional word response format.

When assigning access codes for *DiSC Classic 1.0*, *DiSC Classic 2.0*, *DiSC Classic 2 Plus* or *DiSC PPSS*, you'll have an option to "Select a Response Style for the report" on the Select Report Features screen. If you'd like the respondent to have the word version, leave the response style on the default "Word Version." If you want the respondent to have the phrase version, simply select "Phrase Version."

Both the word or phrase response version will produce the same *DiSC Classic 1.0*, *DiSC Classic 2.0*, *DiSC Classic 2 Plus* or *DiSC PPSS* report and both response style reports can be used when generating group or comparison reports.

Report Options

Check a box to display an option in the report.

[Check All](#) | [Uncheck All](#)

- Highlights
- Graphs 1 and 2
- Graph 3
- Narrative
- Tendencies
- Continuum
- Worksheets (if supplemental reports are included)

Graph Style

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

- Line Chart
- 2D Bar Graph
- 3D Bar Graph

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?](#)

Supplemental Reports for DiSC PPSS General Characteristics will be added to the end of the report. You are able to add additional reports at any time, so if you are going to allow this set of Respondents to view their report online once they complete the assessment, be sure to only include the Supplemental Reports you wish them to see at this time. Note that four (4) credits are charged per Supplemental Report added, and that this credit charge is per Respondent or person.

Supplemental Reports


Choose which Supplemental Reports to include.

- Strategies for Creating a Positive Relationship (5 Credits)
- Relating to People and the Environment (5 Credits)
- Strategies for Managing (5 Credits)
- Approach to Managing Others (5 Credits)
- Strategies for Sales Management (5 Credits)
- Approach to Selling (5 Credits)

5. **Choose a folder** and/or sub folder in which to create new Access Codes or select the **New Folder** link to create a new folder.

Folder: [New Folder](#)

Sub Folder: [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](#)

6. Select **Delivery and Auto Reminder Options**
7. Use one of the three available methods to add Respondents who will receive an Access Code Email to complete their online assessment.


Enter Individual Respondents

Enter an email address and a name for a Respondent, then press the **Add...** button.

Enter Individual | [Import from Excel](#) | [Use Existing Report](#)

After entering the Respondent information, click the **Add Respondent** button to add the name to the list. Click the **Assign Access Codes** button when you're finished adding Respondents.

(Note: If you assign more than 10 Access Codes, they will be queued for delivery and sent out in intervals to avoid being marked as "spam" by the Respondent's email server.)

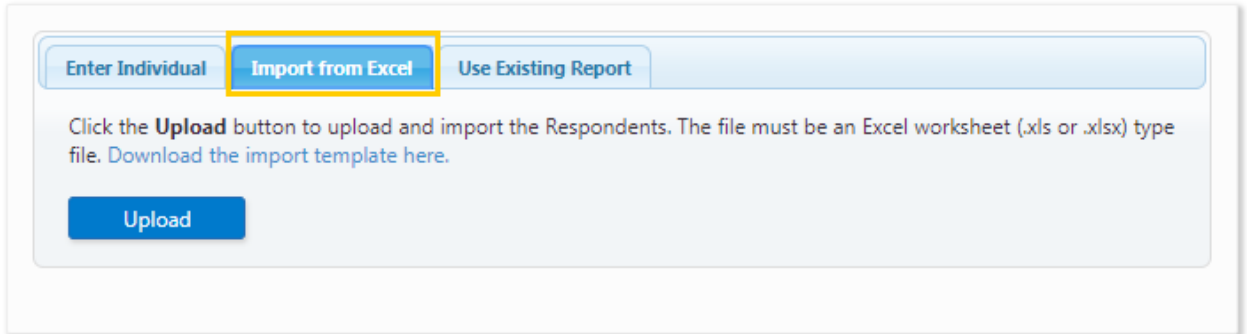
Email Address: Name: Quantity: View Report: Yes No [Add](#) 

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


Import Respondents  **Saver**

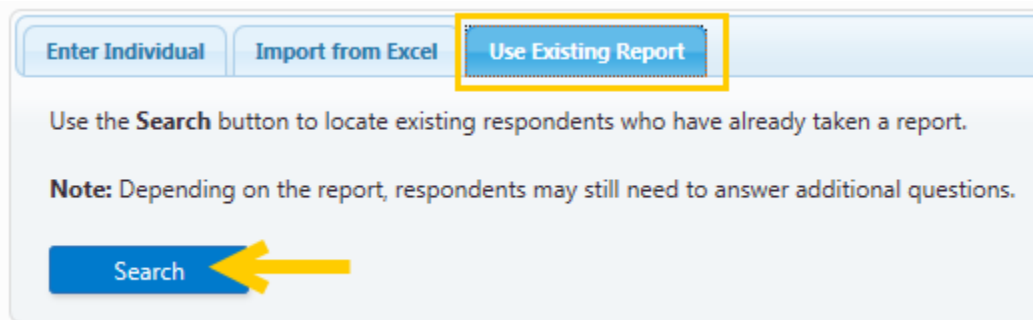
Select the **Import from Excel** tab and upload an Excel spreadsheet of Respondents.

See [Download Import Templates](#) for complete instructions.



Use Existing Report


 **Saver** When available, select the **Use Existing Report** tab, then use the **Search** button to search for and select Respondents with completed profiles.



- When using one completed Everything DiSC Respondent to create a new Everything DiSC or Five Behaviors report, Respondents will not be required to take the DiSC portion of the assessment again. Their previous DiSC style scores will be used in the new report, and only the report-specific questions will be asked.

Respondent List

As you add Respondents using each of the possible ways, EPIC builds a Respondent List.

 *This image is an example only - credit charges vary by product.*

The list below displays the Respondents that will receive an Access Code. To remove a name from the list, click **X**.


Email Address		Name	Quantity	View Report
X bob@wiley.com	Edit	Bob	1	Yes
X chris@wiley.com	Edit	Chris	1	Yes
X leah@wiley.com	Edit	Leah	1	Yes

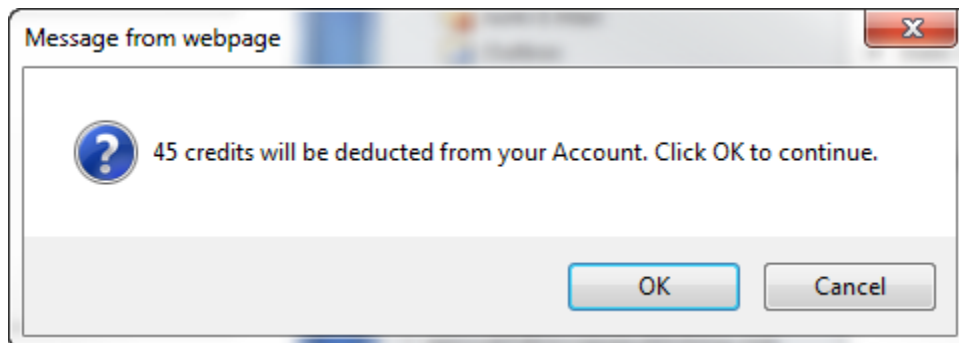
Total Quantity: 3
Total Credits: 45

Press the "**X**" at the beginning of a row to delete the Respondent from the list. Press the **Edit** link for a row to edit the email address, then press **Save** to save your changes.

EPIC displays the **Total Quantity** of access codes about to be created, and the **Total Credits** that will be charged during this transaction in EPIC.


8. Press the **Assign Access Code(s)** button.
9. **Confirm the credit deduction** by pressing the **OK** button, or press **Cancel** to return to the page you were just on.

 *This image is an example only - credit charges vary by product.*



10. Create a **custom email subject line and/or message** for this set of Access Code emails by pressing **OK**, or press cancel to have EPIC send the default email message. Once you are done creating your custom message, or after you have pressed the **Cancel** button, EPIC displays a confirmation page.

The **confirmation page** displays a summary of the product you just created, the Respondents who will receive an Access Code email, and EPIC credit activity associated with this transaction.

 *This image is an example only - credit charges vary by product.*

Respondents ?

Show/Hide				
Email	Name	View	Status	
bob@wiley.com	Bob	Yes	Access Code created and email sent.	
chris@wiley.com	Chris	Yes	Access Code created and email sent.	
leah@wiley.com	Leah	Yes	Access Code created and email sent.	
Summary				
Total Access Codes Created:	3			
Previous Credit Balance:	1,790			

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.

NOTE: If you added more than 10 Respondents or used the Future Delivery option (Delivery Options for Access Codes), the status column will indicate that the Access Code was created and email has been queued for delivery.

Respondents ?

Show/Hide				
Email	Name	View	Status	
bob@wiley.com	Bob	Yes	Access Code created and email queued for delivery.	
chris@wiley.com	Chris	Yes	Access Code created and email queued for delivery.	
leah@wiley.com	Leah	Yes	Access Code created and email queued for delivery.	

Graphs 1 and 2 and Tally Box Scores

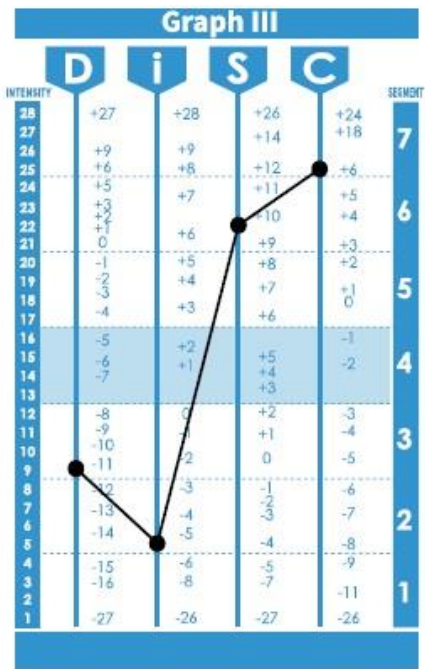
Check a box to display an option in the report.

[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



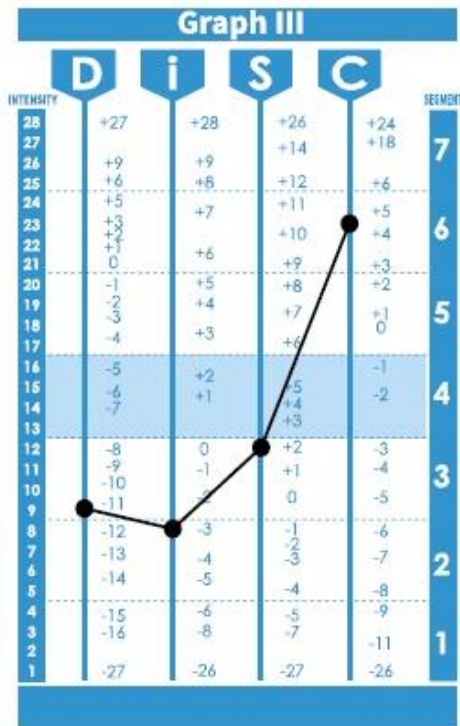
SUMMARY OF INTERPRETATION

Highest DiSC Dimension(s): Conscientiousness (C)

Classical Pattern: Perfectionist Pattern

Segment Numbers: 3267

Graph 3 and Tally Box Scores



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

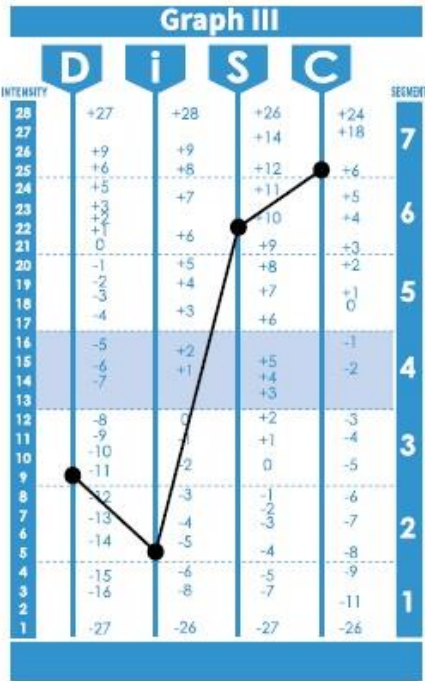
SUMMARY OF INTERPRETATION

Highest DiSC Dimension(s): Conscientiousness (C)

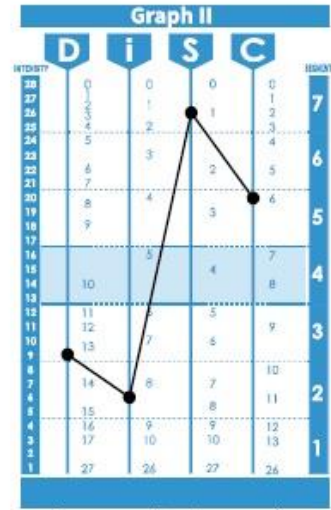
Classical Pattern: Objective Thinker Pattern

Segment Numbers: 3236

Graphs 1, 2, and 3



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



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

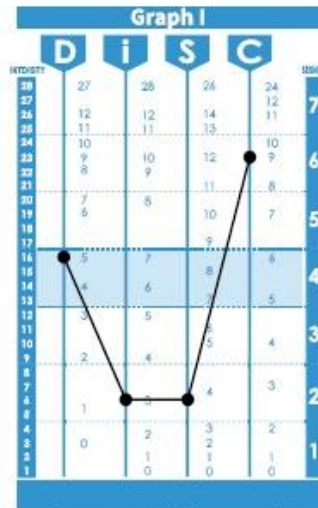
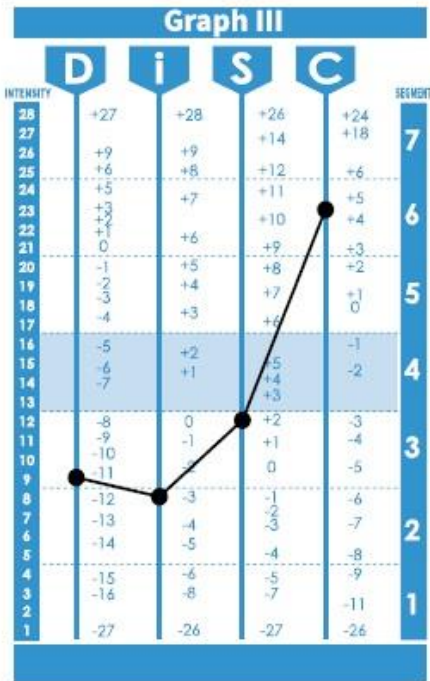
SUMMARY OF INTERPRETATION

Highest DiSC Dimension(s): Conscientiousness (C)

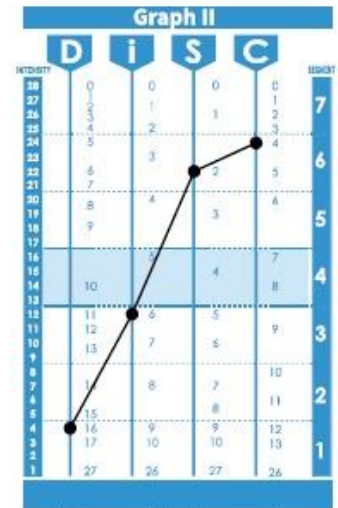
Classical Pattern: Perfectionist Pattern

Segment Numbers: 3267

Graphs 1, 2, 3, and Tally Box Scores



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



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

		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. The report will retain these settings.
- **Batch Functions** ▶ **Edit Report Options:** Apply or remove options for many reports. The affected reports will retain these settings.

- **View/Print/Email Completed Reports:** Apply or remove options for a selected report. These settings are retained for this round of report generation.
- **Batch Functions ▶ Generate Reports for Download:** Apply or remove options for many reports. These settings are retained for this round of report generation.

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

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 in your EPIC account 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 Privacy 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**.

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

Select Creation Method 

Select a method for creating the report and then click the **Next** button below.

- Assign Access Code(s) for an Online Product/Report
- Create an Access Code Extract file

Select Report Options for the group of Access Codes you wish to create, then press **Next**. [More on This Topic](#)

Select Options for your report(s). 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.

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.

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

No page 7 - Overview of DiSC Styles ▼

- See [Manage Report Tailoring](#) to set up or edit product tailoring for a report.
- **MyEverythingDiSC Options:** Available for Everything DiSC products.
- **Supplemental Reports:** Available for DiSC PPSS Products (credit charges apply).

Note: For Extract Files Access Codes, you have the option to require that the Respondent enter an email address. In the **Respondent Site Options** section, check the **Require Email Address** box to enable this option.

Respondent Site Options

These options apply to the EPIC Respondent Site.

[Check All](#) | [Uncheck All](#)

- Require Email Address

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

Folder:	- None Selected -	New Folder
Sub Folder:	- None Selected -	New Sub Folder

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

Enter the Report Quantity. The Total Credits to be charged are automatically calculated.

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.

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** link for any row.

Date	Product	Language	Quantity	Credits	
10/14/2015 3:28 PM	Everything DiSC Workplace Profile	English	3	45	Download
8/31/2015 9:47 AM	Everything DiSC Workplace Profile	English	1	15	Download
4/22/2015 3:46 PM	Everything DiSC Sales Profile	English	10	250	Download
1/22/2015 12:56 PM	Everything DiSC Workplace Profile	Danish	1	30	Download
6/3/2014 8:59 AM	Everything DiSC Sales Profile	English	2	50	Download

Use Existing Respondent's Data to Create a New Report

While creating new reports/Access Codes, you can select a Respondent with an existing, completed report and use their information to create a new report and send them a new online assessment. Go to the [Create A New Report Issue Access Codes](#) help page and choose a product to see help specific to your needs.


-  Check out the **Leap Forward Program**: a cost-effective way to migrate your clients from DiSC Classic to Everything DiSC Workplace!
-  **Saver** When you select a Respondent with an existing, completed DiSC Classic report using the **Use Existing Report** tab, you will not need to enter the Respondent's information into EPIC again, and the Respondent will be given a entirely new assessment.

Use an Existing Report to Create a New Report

Start with the [Create a New Report Issue Access Codes](#) function. During the step in this process where you select Respondents to add to this set of new Access Codes, select the **Use Existing Report** tab to search for and select Respondents with completed reports.

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.

Start with the [Create a New Report Issue Access Codes](#) function, and instead of entering the email address and name of the new Leader, use the link just below the email address to search for and select an existing, completed ED 363 Leader profile.

Add Leader 



Email: Name: Gender:


[Use an existing report as the Leader](#) 

Use an existing Group, Team or Facilitator Report to create a new Group, Team or Facilitator Report

To take an Everything DiSC or DiSC Classic Group, Team, or Facilitator Report and use its Respondents to create a new Group, Team or Facilitator Report containing the same group of Respondents, start with the **Edit Existing Reports** function, choose the report you wish to edit, then use the **Advanced Options** section to select the report and press the **Use existing data for new report button**. On the final page displayed after you have created the new report, you can press the **Edit this report again** button to add or remove report Participants. [Go to](#) the help for this function.

Edit Existing Reports

Choose a product below for instructions on editing the family of related reports using EPIC's **Edit Existing Reports** function.

 **Saver** Note that these instructions are for editing reports one at a time, but that you can use [Batch Edit Report Options](#) to select a group of reports and apply similar changes to the whole group at one time.

Everything DiSC Reports

[ED Workplace, Sales, Management and Work of Leaders Reports](#)

[ED 363 for Leaders Reports](#)

[ED Group, Team and Facilitator Reports](#)

[ED Comparison Reports](#)

Five Behaviors Reports

[Five Behaviors of a Cohesive Team](#)

[Five Behaviors Progress Reports](#)

[Five Behaviors Comparison Reports](#)

[Five Behaviors Powered by All Types](#)

DiSC Classic Reports

[DiSC Classic 1.0, 2.0, and 2 Plus](#)

[DISC PPSS General Characteristics](#)

[DiSC Classic Group, Team and Facilitator Reports](#)

Edit Five Behaviors Reports

Edit Existing Five Behaviors Team and Progress Reports

[Add Team Members](#)

[Include or Exclude Team Members](#)

[Change an Individual's Name or Email Address](#)

[Permanently Remove Team Members from EPIC](#)

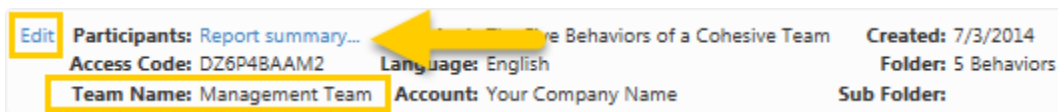
Edit the Annotated Team Report

For each Five Behaviors product you create, EPIC automatically creates a parent record, the Annotated Team Report (ATR), which both acts as the program facilitator's overview of the team's collective data, and ties all of the team member records together in EPIC. You can search for and select the Annotated Team Report to make changes to the parent record, and also use this parent record as a quick and easy link to the individual team member reports.

To make changes to the entire team, edit this parent record using the following process.

Locate the Annotated Team 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.



Edit	Participants: Report summary...	Behaviors of a Cohesive Team	Created: 7/3/2014
	Access Code: DZ6P48AAM2	Language: English	Folder: 5 Behaviors
	Team Name: Management Team	Account: Your Company Name	Sub Folder:

Change Folder or Team Name

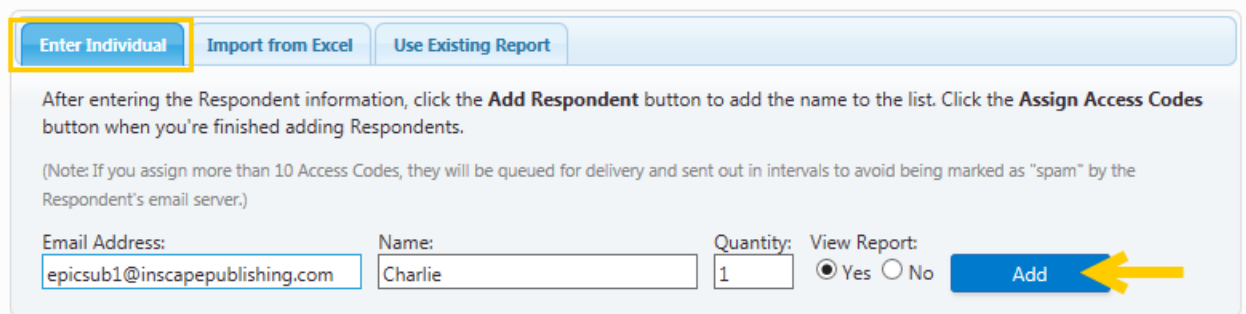
Choose or create a folder or subfolder and/or enter a new name for the existing Five Behaviors Team. Press the **Next** button to save your changes.

Add Team Members

Add Team Members using one of the three methods:

Enter Individual Respondents

Enter an email address and a name for a Respondent, then press the **Add...** button.



Enter Individual | Import from Excel | Use Existing Report

After entering the Respondent information, click the **Add Respondent** button to add the name to the list. Click the **Assign Access Codes** button when you're finished adding Respondents.

(Note: If you assign more than 10 Access Codes, they will be queued for delivery and sent out in intervals to avoid being marked as "spam" by the Respondent's email server.)

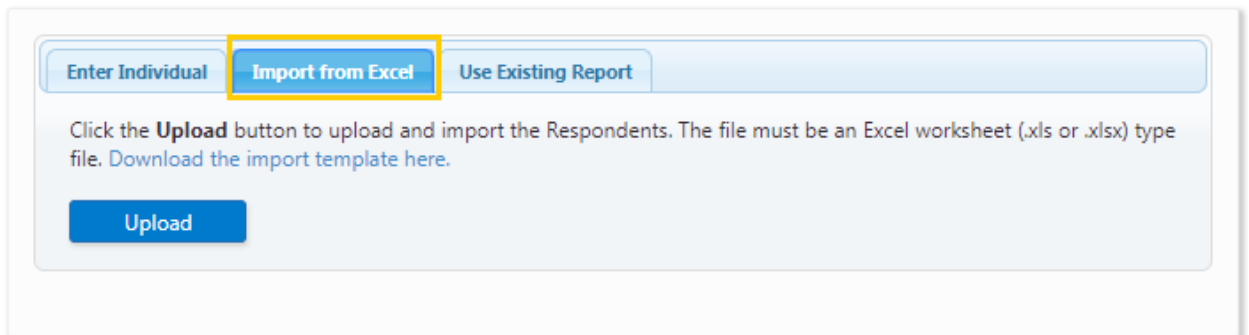
Email Address: Name: Quantity: View Report: Yes No **Add**

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

Import Respondents Saver


Select the **Import from Excel** tab and upload an Excel spreadsheet of Respondents.

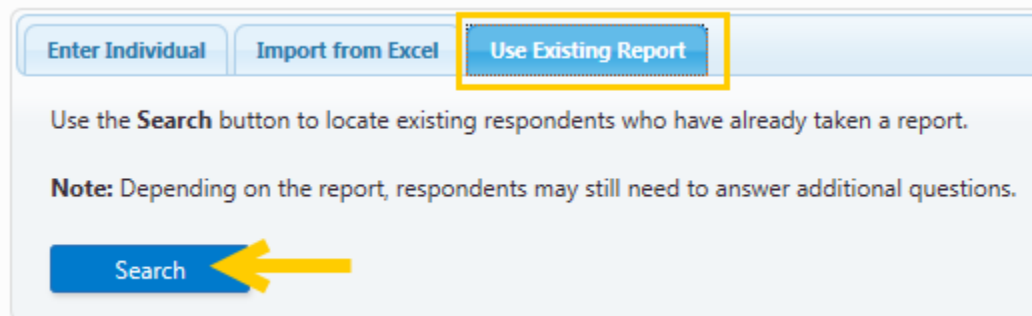
See [Download Import Templates](#) for complete instructions.



The screenshot shows a web interface with three tabs: "Enter Individual", "Import from Excel", and "Use Existing Report". The "Import from Excel" tab is selected and highlighted with a yellow border. Below the tabs, there is a text instruction: "Click the **Upload** button to upload and import the Respondents. The file must be an Excel worksheet (.xls or .xlsx) type file. Download the import template here." Below this text is a blue "Upload" button.

Use Existing Report


 Saver When available, select the **Use Existing Report** tab, then use the **Search** button to search for and select Respondents with completed profiles.











The screenshot shows a web interface with three tabs: "Enter Individual", "Import from Excel", and "Use Existing Report". The "Use Existing Report" tab is selected and highlighted with a yellow border. Below the tabs, there is a text instruction: "Use the **Search** button to locate existing respondents who have already taken a report." Below this text is a "Note": "Note: Depending on the report, respondents may still need to answer additional questions." At the bottom, there is a blue "Search" button with a yellow arrow pointing to it from the right.


- When using one completed Everything DiSC Respondent to create a new Everything DiSC or Five Behaviors report, Respondents will not be required to take the DiSC portion of the assessment again. Their previous DiSC style scores will be used in the new report, and only the report-specific questions will be asked.
- When using a completed DiSC Classic report to create an Everything DiSC report, the Respondent name and email address are carried forward, and the Respondent will be able to take the complete Everything DiSC assessment.

EPIC displays a message when one or more of your Respondents qualifies for the Leap Forward credit discount, and the credit deduction is automatically applied:

 *This image is an example only - credit charges vary by product.*


Email		Name	Qty/Cr	View
 epicsub1@inscapepublishing.com	Edit	john lyons 	1 (5cr)	No <input type="checkbox"/>
 epicsub1@inscapepublishing.com	Edit	Patrick McGivern 	1 (5cr)	Yes <input type="checkbox"/>
 epicsub1@inscapepublishing.com	Edit	Sam Telcar 	1 (5cr)	No <input type="checkbox"/>
 epicsub1@inscapepublishing.com	Edit	Matt McClure 	1 (5cr)	Yes <input type="checkbox"/>

Total Quantity: 4
Total Credits: 20




 One or more respondent(s) qualifies for credit discount.

Respondent List

As you add Respondents using each of the possible ways, EPIC builds a Respondent List.

 *This image is an example only - credit charges vary by product.*

The list below displays the Respondents that will receive an Access Code. To remove a name from the list, click **X**.

Email Address		Name	Quantity	View Report
 bob@wiley.com	Edit	Bob	1	Yes
 chris@wiley.com	Edit	Chris	1	Yes
 leah@wiley.com	Edit	Leah	1	Yes

Total Quantity: 3
Total Credits: 45

Press the "**X**" at the beginning of a row to delete the Respondent from the list. Press the **Edit** link for a row to edit the email address, then press **Save** to save your changes.

EPIC displays the **Total Quantity** of access codes about to be created, and the **Total Credits** that will be charged during this transaction in EPIC.

Once you have populated the Respondent List with all of the team members you wish to add, press the **Next** button. You will be given the option to include a custom email message or subject line, and will then be taken to the confirmation page summarizing your credit transaction. The confirmation page will give you a status of the emails sent to the Respondents (team members) you added.

Edit Individual Team Member Reports

You can search for and select individual team members in one of two (2) ways. Either search for and select the Annotated Team Report using the steps at the top of this page and then edit one of the individual team members listed, or use the [Edit Existing Reports](#) function to locate just the report belonging to the individual team member.

Locate and Edit a Team Member from the Annotated Team Report

With the Annotated Team Report displayed, 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.

Email	Name	View Report	Include	Status	
epicsub3@inscapepublishing.com	Amy 1	Yes	Yes	Complete	Edit

With the individual team member's information displayed, you can make changes to their name, email address, and gender. You can also choose to include or exclude this member from the generated reports, and change whether the Respondent is able to view their report online.

You can also use the **Change Report Options/Content** button to change which sections of the report the team member is able to see online.

Once you are finished editing the individual team member, you can use the **Edit Five Behaviors** button to return to editing the Annotated Team Report.



Locate and Edit a Team Member from their Individual Report

Use the [Edit Existing Reports](#) function to search for and select the individual's Five Behaviors report. Press the **Edit** link, make the necessary changes to their report, then press **Save Changes**.

Exclude a Team Member's Data from All Generated Reports

Using either of the methods above to locate and edit an individual team member's report, change the **Include this Team Member in the report?** field.

- 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** at the same time. EPIC displays a message to ensure these two settings match up.

Remove Team Members from the Annotated Team Report

- **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 to locate the individual's Five Behaviors report and unassign the Access Code.
- **Completed Access Codes:** To permanently remove an individual from a Five Behaviors team after their assessment has been completed, use the [Delete Reports](#) function to locate the individual's Five Behaviors report and delete their record from EPIC.

Edit Comparison Reports


Use the steps below to edit both  Five Behaviors and  Everything DiSC Comparison Reports.

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. Make changes to either the folder and sub folder or to the report Participants:

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

Folder: [New Folder](#)

Sub Folder: [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](#)

To begin editing Participants for the Comparison Report, you must first delete one of the Participants by pressing the "X" for that row.


Participants


You cannot add any more participants. 

Email	Name	Product
 epicsub2@inscapepublishing.com	Sara King	Everything DiSC Sales Profile (English)
 epicsub3@inscapepublishing.com	Ethan Jackson	Everything DiSC Work of Leaders (English)

With one of the Participants deleted from the original report, the **Add** button is now available. Press the **Add** button to locate and select a second Participant for this report.

Participants



Email	Name	Product
 epicsub2@inscapepublishing.com	Sara King	Everything DiSC Sales Profile (English)

You cannot remove both Participants from the report at the same time. To replace both of the Participants, remove one at a time and add their replacement using the steps above.

- Once you have made your changes, press the **Next** button.

Your changes have been saved. Press the plus sign  to the left of the **Show/Hide Report Participants** link to view the list of Participants included in the report.

Report Participants

Show/Hide Report Participants

Email	Name	Product
epicsub1@inscapepublishing.com	Ethan Jackson	Everything DiSC Work of Leaders (English)
epicsub1@inscapepublishing.com	Nick Lee	Everything DiSC Work of Leaders (Finnish)

View/Print/Email Report Edit this report again

Press the **View/Print/Email Report** button to generate a PDF version of the report, or press the **Edit this report again** button to make changes to this report.

Edit Everything DiSC Reports

Edit Everything DiSC Workplace, Sales, Management, Work of Leaders Reports and Productive Conflict

See the information below on editing [Pending](#) and [Completed](#) reports, or use the following steps to begin editing an Everything DiSC 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** button, choose **OK** to continue to the Advanced Options page, make your desired changes, then press the **Save** button.

Note that 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.

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 Criteria

Return to Search Results

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.

Access Code:	XXXXXXXXXX
Access Code Status:	Complete
Edits remaining for this report:	2
Product:	Everything DiSC Workplace Profile
Language:	English
Report Options:	Discovering Your DiSC® Style, Understanding Other Styles, Building More Effective Relationships, Personalized Style Index

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 pending 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 sending a new email to Respondent containing a new access code. The original access code will no longer be valid.

- **Gender**

For pending ³⁶³ ED 363 Access Codes, the gender entered determines how the assessment reads to the Raters ("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.

- **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 Access Codes do not allow changes to Leader name for pending or completed Access Codes.

Edit Completed Reports

Select a field below to see notes specific to editing the field for completed 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.

Respondent Information

Access Code:	AGXXHTZGSE
Access Code Status:	Pending
Edits remaining for this report:	2
Product:	Everything DiSC Workplace Profile
Language:	English

- 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.

Respondent Information

Access Code:	AGXXHTZGSE
Access Code Status:	Pending
Edits remaining for this report:	2
Product:	Everything DiSC Workplace Profile
Language:	English

- 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.


Respondent Information

Access Code:	AGXXHTZGSE
Access Code Status:	Pending
Edits remaining for this report:	2
Product:	Everything DiSC Workplace Profile
Language:	English

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 Online** 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**.

Edit an Everything DiSC 363 for Leaders Report

The ability to edit report properties depends on whether the report is considered to be completed or pending, and on how much time has passed since the Access Code was issued.


 ED 363 for Leaders reports are considered to be completed when the Leader and one Rater have completed the online assessment. Completed ED 363 for Leaders reports can be edited for 150 days after they achieve a status of completed. During the 150 day limit, the Leader email address and gender can be changed, and Raters can be added or removed from the report.


Use the following steps to begin editing an Everything DiSC 363 for Leaders 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. Make changes to your report in one of the following areas:

Folder & Sub Folder

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

Folder:	<input type="text" value="- None Selected -"/>		New Folder
Sub Folder:	<input type="text" value="- None Selected -"/>		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](#)

Leader

Press the Edit link for the Leader to be taken to a page where you can edit the Leader's information. See the help section below regarding [Pending](#) and [Completed](#) records, as some information cannot be edited for completed records.

Raters

Press the Edit link for any rater to be taken to a page where you can edit the Rater information. See the help section below regarding [Pending](#) and [Completed](#) records, as some information cannot be edited for completed records.

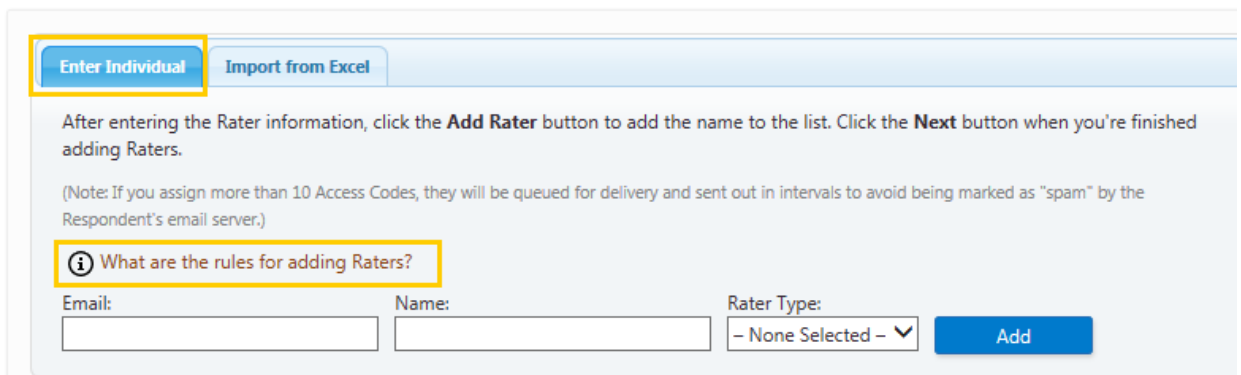
Add Raters

Use either of the two available methods to add Raters to this ED 363 for Leaders report.

Enter Individual Raters

Enter a name, email address and Rater type for each of the people who should receive an emailed link to the online assessment questions regarding the Leader.


Add Raters 



Enter Individual Import from Excel

After entering the Rater information, click the **Add Rater** button to add the name to the list. Click the **Next** button when you're finished adding Raters.

(Note: If you assign more than 10 Access Codes, they will be queued for delivery and sent out in intervals to avoid being marked as "spam" by the Respondent's email server.)

 What are the rules for adding Raters?

Email: Name: Rater Type:

What are the Rules for Adding Raters?

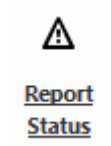
The Everything DiSC 363 for Leaders profile divides raters into 4 categories: **Manager**, **Peer/Coworker**, **Direct Report**, and **Other**. If you use one of these categories when assigning access codes, a

minimum number of Raters in the category need to respond before the report can be generated. You do not need to have the minimum number in each category to assign the access codes since Raters can be added at a later date using the Edit function. The current minimums are:

- Manager: 1
- Peer: 2
- Direct Report: 2
- Other: 2

(Note: You do not need to use all of the rater categories)

When you retrieve a report for printing (View/Print/Email), EPIC checks the minimum rater requirements. If the minimum number of Raters have not completed responding, the Report Status icon will be displayed. Click on the Report Status link to determine why the report cannot be generated.



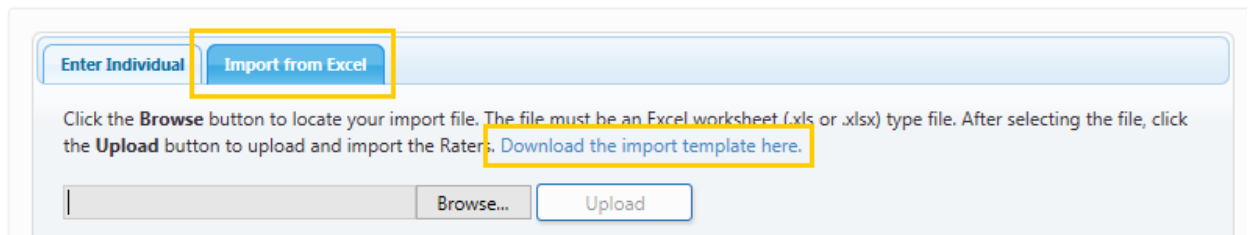
In cases where you want to generate the report and the minimum has not been reached (or may never be reached) you can use the Edit function to change the rater category for a rater or use the Include function to temporarily remove the rater’s response from the report.

Import Raters  **Saver**

Press the **Import from Excel** tab and upload an Excel spreadsheet of Respondents.

See [Download Import Templates](#) for complete instructions.

Add Raters 



Rater List

As you add Raters using each of the possible ways, EPIC builds a Rater List.

The list below displays the Raters that will receive an Access Code. To remove a name from the list, click ✕.

Email		Name	Rater Type
✕ bob@wiley.com	Edit	Bob	Direct Report
✕ chris@wiley.com	Edit	Chris	Direct Report
✕ leah@wiley.com	Edit	Leah	Manager

Total Rater Quantity: 3

Press the "X" at the beginning of a row to delete the Rater from the list. Press the **Edit** link for a row to edit the email address, then press **Save** to save your changes.

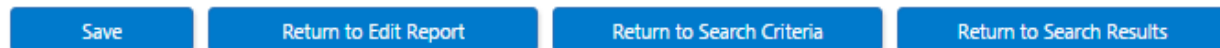
EPIC displays the **Total Rater Quantity** at the bottom of the list.

5. Press the **Next** button to save any changes you made in the areas above. If you added Raters, you will have the option of sending a custom email message, and will end up on the confirmation page which indicates the status of emails sent to any added Raters.

Advanced Options

Make your desired changes to the Report Content or Production Tailoring.

Press the **Save** button to save your changes. Press the **Return to Edit Report** button to return to the main edit page for this report. You can also return to your search criteria or search results pages.



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 **Days remaining to edit this report** field.

Report Details

Access Code:	Y2JATNY2TE
Access Code Status:	Complete
Days remaining to edit this report:	30
Product:	Everything DiSC 363 for Leaders
Language:	English
Report Options:	Introduction, Big-Picture Feedback, Detailed

Edit Pending Reports


Select a field below to see notes specific to editing the field for pending Everything DiSC 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 sending a new email to Respondent containing a new access code. The original access code will no longer be valid.

- [Leader Name](#)

 ED 363 Leader names cannot be edited once Access Codes have been created. Unassign pending Access Codes and re-create the report to correct the leader name. (This will be the leader name as seen by the raters, but will not be the name on the completed report.)

Note that 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 Info](#)

 ED 363 Rater 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 Access Codes, the gender entered determines how the assessment reads to the Raters ("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 Access Codes do not allow changes to Respondent name for pending or completed Access Codes.

Edit Completed Reports

Select a field below to see notes specific to editing the field for completed Everything DiSC 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.

Respondent Information

Access Code:	AGXXHTZGSE
Access Code Status:	Pending
Edits remaining for this report:	2
Product:	Everything DiSC Workplace Profile
Language:	English

- **Leader Name**

363 ED 363 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.

Respondent Information **?**

Access Code:	AGXXHTZGSE
Access Code Status:	Pending
Edits remaining for this report:	2
Product:	Everything DiSC Workplace Profile
Language:	English

- **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.

Respondent Information **?**

Access Code:	AGXXHTZGSE
Access Code Status:	Pending
Edits remaining for this report:	2
Product:	Everything DiSC Workplace Profile
Language:	English

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 Online** 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**.

- **Add Raters**

Add new Raters to a completed  ED 363 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.

Edit Comparison Reports


Use the steps below to edit both ▲ Five Behaviors and  Everything DiSC Comparison Reports.

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. Make changes to either the folder and sub folder or to the report Participants:

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

Folder: [New Folder](#)

Sub Folder: [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](#)

To begin editing Participants for the Comparison Report, you must first delete one of the Participants by pressing the "X" for that row.

Participants

You cannot add any more participants. ✕

Email	Name	Product
✕ epicsub2@inscapepublishing.com	Sara King	Everything DiSC Sales Profile (English)
✕ epicsub3@inscapepublishing.com	Ethan Jackson	Everything DiSC Work of Leaders (English)

With one of the Participants deleted from the original report, the **Add** button is now available. Press the **Add** button to locate and select a second Participant for this report.

Participants

Add

Email	Name	Product
✕ epicsub2@inscapepublishing.com	Sara King	Everything DiSC Sales Profile (English)

You cannot remove both Participants from the report at the same time. To replace both of the Participants, remove one at a time and add their replacement using the steps above.

5. Once you have made your changes, press the **Next** button.

Your changes have been saved. Press the plus sign  to the left of the **Show/Hide Report Participants** link to view the list of Participants included in the report.

Report Participants

Show/Hide Report Participants

Email	Name	Product
epicsub1@inscapepublishing.com	Ethan Jackson	Everything DiSC Work of Leaders (English)
epicsub1@inscapepublishing.com	Nick Lee	Everything DiSC Work of Leaders (Finnish)

View/Print/Email Report Edit this report again

Press the **View/Print/Email Report** button to generate a PDF version of the report, or press the **Edit this report again** button to make changes to this report.

Edit Group, Team and Facilitator Reports

Use the steps below to edit the following EPIC report types:

<p>Everything DiSC Reports:</p> <ul style="list-style-type: none">• ED Work of Leaders Group Report• ED Work of Leaders Facilitator Report• ED Group Culture Report• ED Facilitator Report• ED Team View	<p>DiSC Classic Reports:</p> <ul style="list-style-type: none">• DiSC Classic Group Culture Report• DiSC Classic Facilitator Report• DiSC Classic Team View
--	---


To create a Group, Team or Facilitator Report from an existing one, jump down to the help for the **Advanced Options**.

To make general edits to a Group, Team or Facilitator Report, follow these steps:

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. Make changes to your report in one of the following areas:

Report Details

Choose a folder and/or sub folder in which to create new Access Codes or select the **New Folder** link to create a new 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](#)

Enter a **Report Name** for products with this option. The report name does not appear on the cover of the report, but can be very useful to you later if you want to search for the report to edit or print it. Report Names can be changed in EPIC while editing the report.

Report Name:

Participants

Press the **Add** button to begin adding participants to the report.

Participants

Use the **Search** function to locate and select people to add to the report.

As you select participants, EPIC creates a list in the Participants section. You can continue to use the **Add** button to add participants, and you can press the "X" for any participant to remove them from the list.

Participants ?

Add	
Email	Name
<input type="checkbox"/> epicsub4@inscapepublishing.com	Joan Avery
<input type="checkbox"/> epicsub1@inscapepublishing.com	Bob McMater
<input type="checkbox"/> epicsub3@inscapepublishing.com	Annie Gshould

5. Press the **Next** button once you have made your changes.

The **confirmation screen** displays a summary of the product you just created and EPIC credits charged for creation of the report.

Press the plus sign \oplus to the left of the **Show/Hide Report Participants** link to view the list of Participants included in the report.

Report Participants

<input type="checkbox"/> Show/Hide Report Participants		
Email	Name	Product
epicsub3@inscapepublishing.com	Annie Gshould	Everything DiSC Wc
epicsub1@inscapepublishing.com	Bob McMater	Everything DiSC Wc
epicsub4@inscapepublishing.com	Joan Avery	Everything DiSC Wc




Press the **View/Print/Email Report** button to generate a PDF version of the report, or press the **Edit this report again** button to make changes to this report.

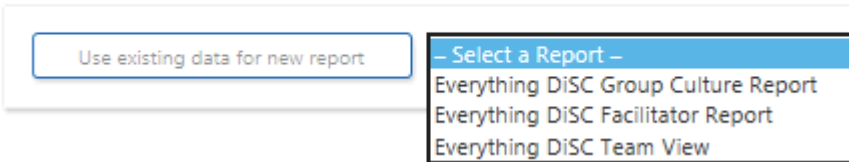
Advanced Options

Use Existing Data for New Report button

While editing an existing group, team or facilitator report, you have the option to use all of the Participants to create a group report of a different type. In the **Advanced Options** section, first select a report from the drop-

down list, then press the **Use existing data for new report** button and then follow the steps for [creating a group, team or facilitator report](#).

Advanced Options 



The screenshot shows a user interface element with a button and a dropdown menu. The button is labeled "Use existing data for new report". To its right is a dropdown menu with a blue header that says "- Select a Report -". The menu is open, showing three options: "Everything DiSC Group Culture Report", "Everything DiSC Facilitator Report", and "Everything DiSC Team View".

Edit DiSC Classic Reports


Edit DiSC Classic and DiSC PPSS General Characteristics Reports

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.)

Press the **View Tally Box Scores** button to expand an area displaying the scores for this report.

OR

4. Press the **Change Report Options/Content** button, choose **OK** to continue to the Advanced Options page, and make your desired changes.

 For the PPSS General Characteristics product, four (4) credits are charged for each supplemental report. Adding reports during this process will result in credit charges for each report added.

Note that 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.

Press the **Save** button to apply any changes to report options or content.

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 Criteria

Return to Search Results

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.

Access Code Status:	Complete
Edits remaining for this report:	2
Product:	Everything DiSC Workplace Profile
Language:	English
Report Options:	Discovering Your DiSC® Style, Understanding Other Styles, Building More Effective Relationships, Personalized Style Index

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 Group, Team and Facilitator Reports

Use the steps below to edit the following EPIC report types:

<p>Everything DiSC Reports:</p> <ul style="list-style-type: none"> • ED Work of Leaders Group Report • ED Work of Leaders Facilitator Report • ED Group Culture Report • ED Facilitator Report • ED Team View 	<p>DiSC Classic Reports:</p> <ul style="list-style-type: none"> • DiSC Classic Group Culture Report • DiSC Classic Facilitator Report • DiSC Classic Team View
--	---

To create a Group, Team or Facilitator Report from an existing one, jump down to the help for the **Advanced Options**.


To make general edits to a Group, Team or Facilitator Report, follow these steps:

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. Make changes to your report in one of the following areas:

Report Details

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

Folder:	<input type="text" value="- None Selected -"/>	New Folder
Sub Folder:	<input type="text" value="- None Selected -"/>	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](#)

Enter a **Report Name** for products with this option. The report name does not appear on the cover of the report, but can be very useful to you later if you want to search for the report to edit or print it. Report Names can be changed in EPIC while editing the report.

Report Name:	<input type="text" value="HR Workgroup"/>
--------------	---

Participants

Press the **Add** button to begin adding participants to the report.

Participants

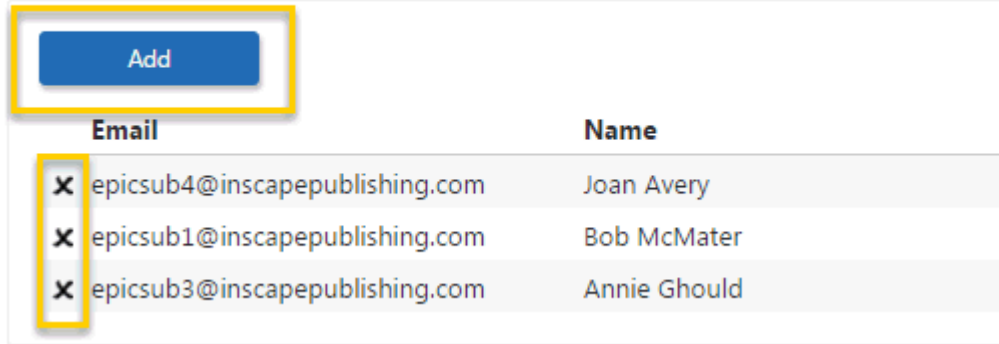
<input type="button" value="Add"/>

Use the **Search** function to locate and select people to add to the report.




As you select participants, EPIC creates a list in the Participants section. You can continue to use the **Add** button to add

participants, and you can press the "X" for any participant to remove them from the list.

Participants




The screenshot shows a blue button labeled "Add" at the top left. Below it is a table with two columns: "Email" and "Name". There are three rows of data, each with a small "X" icon in the "Email" column.

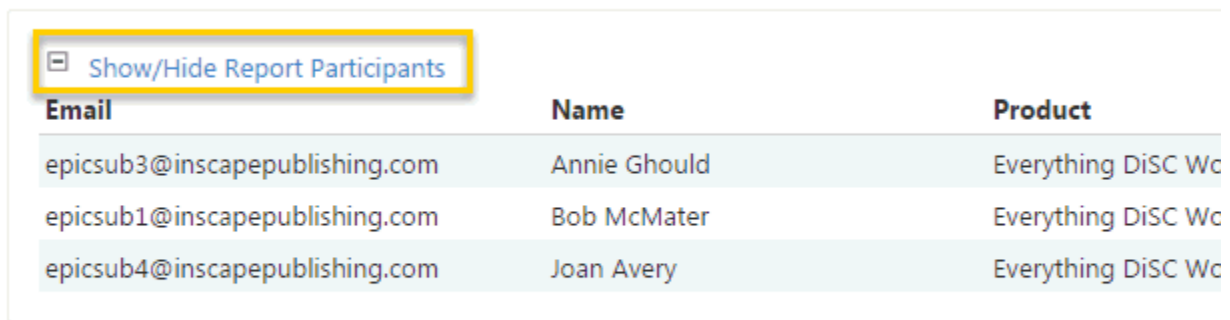
Email	Name
 epicsub4@inscapepublishing.com	Joan Avery
 epicsub1@inscapepublishing.com	Bob McMater
 epicsub3@inscapepublishing.com	Annie Gshould

5. Press the **Next** button once you have made your changes.

The **confirmation screen** displays a summary of the product you just created and EPIC credits charged for creation of the report.

Press the plus sign  to the left of the **Show/Hide Report Participants** link to view the list of Participants included in the report.

Report Participants



The screenshot shows a blue link labeled "Show/Hide Report Participants" with a plus icon to its left. Below it is a table with three columns: "Email", "Name", and "Product".

Email	Name	Product
epicsub3@inscapepublishing.com	Annie Gshould	Everything DiSC Wc
epicsub1@inscapepublishing.com	Bob McMater	Everything DiSC Wc
epicsub4@inscapepublishing.com	Joan Avery	Everything DiSC Wc



Two blue buttons are shown side-by-side. The left button is labeled "View/Print/Email Report" and the right button is labeled "Edit this report again".

Press the **View/Print/Email Report** button to generate a PDF version of the report, or press the **Edit this report again** button to make changes to this report.

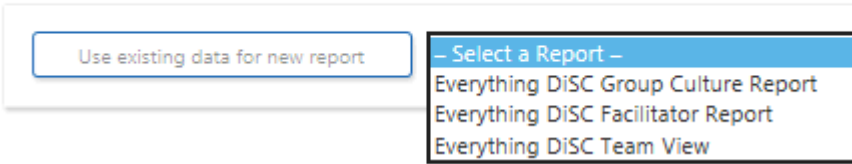
Advanced Options

Use Existing Data for New Report button

While editing an existing group, team or facilitator report, you have the option to use all of the Participants to create a group report of a different


type. In the **Advanced Options** section, first select a report from the drop-down list, then press the **Use existing data for new report** button and then follow the steps for [creating a group, team or facilitator report](#).



Advanced Options



View/Print/Email Completed Reports

Use this function to create one (1) PDF document for viewing, printing or emailing. Each time a report is generated, EPIC grabs the most up-to-date information to pull 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.

 **Saver** Use **Batch Functions** ▶ **Generate Reports for Download** to generate many reports at one time. These reports will generate in the background while you continue working in EPIC or logout of the system.

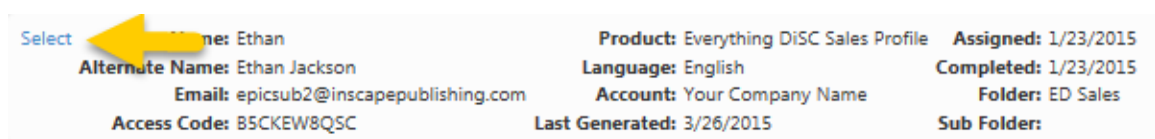
Multi-Respondent reports such as  Five Behaviors and  Everything DiSC 363 for Leaders products have completion requirements that must be met before a report can be generated. (See [Search Results section for Multi-Respondent Reports](#))

Generate Individual Reports

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

Use the [Search](#) function to locate a report.

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



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

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

Press the **Next** button.

2. While EPIC is pulling the most recent data into the report for you, the following message appears, though it may vary in appearance depending on what internet browser you are using:



Please wait while your report is generated...

3. Press the **View** button, the **Save** button, or the **Email** button.

Your report has been generated.

Everything DiSC Sales Profile

View Save Email

Everything DiSC Supplement for Facilitators

View Save Email

[Return to Search Criteria](#) [Return to Search Results](#)

View (& Print) Completed Reports

Press the **View** 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 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


Email Recipients

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.


Report Participants

Open the Participant list and select names 

Additional Report Recipients

Add additional Report Recipients 

Custom Email

Add a Custom Email Message 

Save Completed Reports

Press the **Save** button 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.

Choose **Manage Reports** ▶ **Resend Login Information**

Use the [Search](#) function to locate and select the report(s) for which you wish to resend an Access Code 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.

Manage Reports


Resend Login Information • Search Results


Select Access Codes by clicking the box to the left of the name. Then click the **Next >>** button to continue. To select *all* Access Codes returned by the search, click the **Select All >>** button at the bottom of the page.


Displaying results 1 - 3 of 3 Sort by: Ascending Descending

<input checked="" type="checkbox"/>	Leader Name: Vaughn Respondent Name: Vaughn Magnussen Participants: Report summary... Access Code: 4JHEEWR3GM	Product: Everything DiSC 363 for Leaders Language: English Account: Co-Work-R.S.	Created: 1/4/2016 Folder: Brannick HR Sub Folder:
<input checked="" type="checkbox"/>	Leader Name: Tessa Respondent Name: Participants: Report summary... Access Code: HYPNZBL4A	Product: Everything DiSC 363 for Leaders Language: English Account: Co-Work-R.S.	Created: 1/4/2016 Folder: Brannick HR Sub Folder:
<input type="checkbox"/>	Leader Name: Mike Respondent Name: Participants: Report summary... Access Code: 27YEDFKJ7Q	Product: Everything DiSC 363 for Leaders Language: English Account: Co-Work-R.S.	Created: 1/4/2016 Folder: Brannick HR Sub Folder:

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 are completed, cannot be viewed online, and have no further possible action by the Respondent.

 For ED 363 products, the Raters 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.

 If you create a custom email message to be sent to Leaders, all of the Leaders you select will receive the same custom message.

Access Codes will be resent to the names shown below. To exclude a name, remove the checkmark in the Resend column. Once you have verified the list, click the **Resend Login Information** button at the bottom of the screen to complete the resend process.

Leaders and Raters/Observers ⓘ

This list contains all of the **Leader** and **Rater/Observer** Access Codes to be resent. To exclude a name, remove the checkmark.

Show All | Hide All | Check All | Uncheck All

- Tessa** (Leader, Pending) • epicsub3@inscapepublishing.com
 - Lew (Manager, Pending) • epicprimary@inscapepublishing.com
 - Nora (Peer/Coworker, Pending) • epicsub2@inscapepublishing.com
 - Will (Peer/Coworker, Pending) • epicprimary@inscapepublishing.com
- Vaughn Magnussen** (Leader, Complete) • epicsub2@inscapepublishing.com
 - Adam (Direct Report, Pending) • epicsub1@inscapepublishing.com
 - Lee (Direct Report, Pending) • epicsub1@inscapepublishing.com
 - Victoria (Manager, Pending) • epicsub2@inscapepublishing.com

[Resend Login Information](#) [Return to Search Criteria](#) [Return to Search Results](#)

Press the **Resend Login Information** button.

Click **OK** to include a [custom email message](#) or change the subject line.
Click **Cancel** to bypass.

363 ED 363 products include two (2) separate areas to create different custom messages for both the Leader and the Raters.





! If you create a custom email message to be sent to Leaders, all of the Leaders you select will receive the same custom message.

See Also: [Manage Individual Sub Accounts](#) ▶ [Send Login Information](#)

Delete Reports

- Deleting a completed report removes the Respondent assessment responses from EPIC, thus the profile can no longer be generated/viewed.
- Deleting pending 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 reports include an association between the Raters and the Leader Access Codes in EPIC. Deleting the Leader Access Codes for one of these products also deletes the associated Rater Access Codes. ED 363 reports in pending status will be credited back to your account

upon deletion. A 363 for Leaders report is considered to be completed when the Leader and at least one (1) Rater have completed the online assessment. To be considered pending, these report conditions must met:

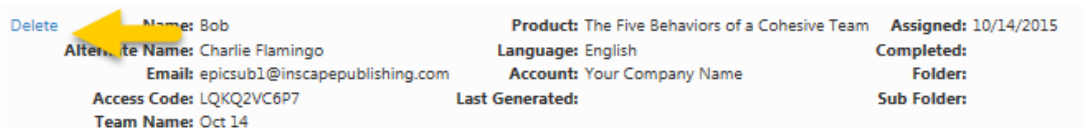
- The Leader has not completed the assessment, regardless of whether any Raters have completed their assessments, or
 - The Leader has completed the assessment, but none of the Raters have completed their assessments.
-  Deleting an individual Five Behaviors access code removes the team member from the Five Behaviors or Progress Report 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 or Five Behaviors Progress Report 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 [MyEverythingDiSC](#) account.
 -  If you delete an individual report for a Respondent, and that Respondent's report was 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 the last remaining member of the group and thus render the group or comparison report Access Code unusable.

To Delete a Report

Choose **Manage Reports** ▶ **Delete Reports**.

Use [Search](#) to locate the report you wish to delete.

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



The screenshot shows a report card with the following details:

Delete	Name: Bob	Product: The Five Behaviors of a Cohesive Team	Assigned: 10/14/2015
Alter...	Alternate Name: Charlie Flamingo	Language: English	Completed:
	Email: epicsub1@inscapepublishing.com	Account: Your Company Name	Folder:
	Access Code: LQXQ2VC6P7	Last Generated:	Sub Folder:
	Team Name: Oct 14		

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



Warning! This action will **permanently delete** this report. Click the **Delete Report** button if you are sure you want to proceed.
Note: If this report is part of a Comparison Report (e.g., Group Report, Facilitator Report, Dyad Report, etc.), deleting this report may cause the Comparison Report to become invalid.

[Delete Report](#) [Return to Search Criteria](#) [Return to Search Results](#)


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

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

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

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 in your EPIC account 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 Privacy 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** link for any row.

Date	Product	Language	Quantity	Credits	
10/14/2015 3:28 PM	Everything DiSC Workplace Profile	English	3	45	Download
8/31/2015 9:47 AM	Everything DiSC Workplace Profile	English	1	15	Download
4/22/2015 3:46 PM	Everything DiSC Sales Profile	English	10	250	Download
1/22/2015 12:56 PM	Everything DiSC Workplace Profile	Danish	1	30	Download
6/3/2014 8:59 AM	Everything DiSC Sales Profile	English	2	50	Download

See Also: [Create an Access Code Extract File](#)

Download Import Templates

An import template is an Excel spreadsheet (.xls or .xlsx) you can use to quickly import multiple Respondents.

Download an Template



Go to **Manage Reports** ▶ **Download Import Templates**

- The Individual Respondent Template is used for all products except for ED 363 for Leaders.
- The Rater Template is for importing ³⁶³ ED 363 Raters.

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:
 - Individual Respondents require you to enter a "1" or "0" to allow online report viewing by Respondents.
 - ³⁶³ ED 363 for Leaders uses Column C to indicate what kind of Rater 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 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**

Click the **Import from Excel** tab to display the File **Upload** button.

The screenshot shows a web interface with three tabs: "Enter Individual", "Import from Excel" (which is highlighted with a yellow box), and "Use Existing Report". Below the tabs, there is a text instruction: "Click the **Upload** button to upload and import the Respondents. The file must be an Excel worksheet (.xls or .xlsx) type file. [Download the import template here.](#)" At the bottom of this section, there is a blue button labeled "Upload".

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

Your imported names and email addresses will be displayed in the list of Respondents who will receive an Access Code email.

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.

The following spreadsheet errors will prevent the data from uploading:

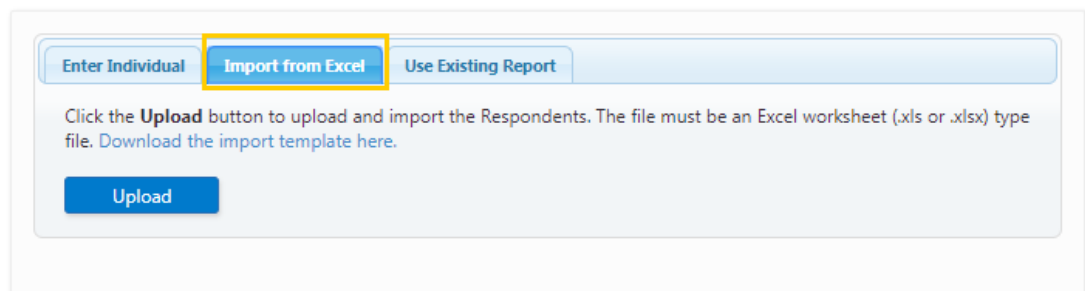
- Invalid email address domain (@incorrectEmailAddress.com).
- Improperly formatted data in the spreadsheet such as:
 - Row 1 column headings altered for columns A, B & C (column headings must not be changed).
 - Words in Column C rather than numbers.
 - Last row not completely blank (a partial row of 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**

Click the **Import from Excel** tab to display the File **Upload** button.



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

Your imported names and email addresses will be displayed in the list of Respondents who will receive an Access Code email.

Batch Functions

Batch Functions allow you to create, edit, or generate a large group 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. This function also generates a PDF of the report for download/printing.

([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...](#))

Batch Edit Report Options

Choose **Manage Reports** ▶ **Batch Functions** ▶ **Edit Report Options**

Select a Product Family, Product and Language.

Press the **Add Reports** button and use [Search](#) to locate and select the reports you wish to edit.

Select the options you wish to change. These depend on the product chosen and can include View Report Online, [Product Tailoring](#), and [MyEverythingDiSC](#) Options.

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

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 in some way; such as giving them the option to view their completed report online, or adding MyEverythingDiSC options.

Report List

Updated Reports								
Email	Name	View Online	Access Enabled	My Comparisons	My Style	My Customers	Tailoring	Email Sent
epicsub2@inscapepublishing.com	Ben Hanna	Yes	Yes	Yes	Yes	No	No	No
epicsub3@inscapepublishing.com	Tiffany Bauchaus	Yes	Yes	Yes	Yes	No	No	No
epicsub4@inscapepublishing.com	Harold Potter	Yes	Yes	Yes	Yes	No	No	No
Unaffected Reports								
None								

Add/Remove MyEverythingDiSC Report Options

Go to **MyEverythingDiSC Functions** ▶ **Add/Remove Options** and select an Everything DiSC product.

The Batch Edit Report Options page is displayed, showing the options associated with the product you chose.

Set **View Report Online** to **Yes** or **No** or default to **No Change** (setting does not affect access to MyEverythingDiSC).

Add or Remove Options

MyEverythingDiSC Options [What is this?](#)

Access to MyEverythingDiSC [Tell me more...](#)

Enable Remove No change

My Comparisons

Enable Remove No change

My Style

Enable Remove No change

My Customers


Enable Remove No change

To Add: First select the **Enable** button for **Access to MyEverythingDiSC**, and then select the individual **Enable** buttons for the options you wish to enable for the Respondent (My Style, My Comparisons, My Customers).

To Remove: Select the radio button in the **Remove** column for the listed option, or select the **Remove** button beneath **Access to MyEverythingDiSC** to quickly remove access to the site as well as all available options.

Press the **Add Reports** button to search for and select the reports for which you wish to add or remove MyEverythingDiSC options (repeat this step to select additional reports).

The **Report List** section displays the selected reports and the current **View Report Online** and **MyEverythingDiSC** options assigned to them. Review the list of added reports and delete any by selecting the "X" to the left of the email address.

 To apply your selected changes, press the **Update Report Options** button.

Press **OK** to include a custom email message, or **Cancel** to send the default message.

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**).

Report List

Updated Reports								
Email	Name	View Online	Access Enabled	My Comparisons	My Style	My Customers	Tailoring	Email Sent
epicsub2@inscapepublishing.com	Ben Hanna	Yes	Yes	Yes	Yes	No	No	No
epicsub3@inscapepublishing.com	Tiffany Bauchaus	Yes	Yes	Yes	Yes	No	No	No
epicsub4@inscapepublishing.com	Harold Potter	Yes	Yes	Yes	Yes	No	No	No

Unaffected Reports
None

Batch Edit Delivery Options for Access Code Groups


Go to **Manage Reports** ▶ **Batch Functions** ▶ **Edit Delivery Options for Access Code Groups**

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

Access Code Groups

Group ID	Send Date	Resend Date	
Everything DiSC Workplace Profile (English) 1/4/2016 3:55 PM	1/4/2019 6:00 PM		Edit
Team Dimensions Profile (English) 1/12/2015 9:03 AM	1/12/2017 11:45 AM		Edit
Everything DiSC 363 for Leaders (English) 12/22/2015 11:10 AM	5/26/2016 1:15 PM	3/9/2017 1:15 PM	Edit
Everything DiSC Management Profile (English) 12/22/2015 11:07 AM	12/22/2015 11:07 AM	4/20/2017 1:15 PM	Edit

Make your desired changes to delivery or reminder date.

Deliver email: Immediately On this date  (GMT - 6)

Send reminder: Never If not completed by

Respondents

Name	Name	Folder	Sub Folder	Sent Date
epicsub2@inscapepublishing.com	Kyle K.			
epicsub5@inscapepublishing.com	Belle Jackson			

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

Go to **Manage Reports** ▶ **Batch Functions** ▶ **Generate Reports for Download**.

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

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

Product:	Everything DiSC Work of Leaders
Language:	English
Report Count:	3
File Name:	<input type="text" value="20160105_092914"/> <small>50 char. max</small>
	 Customizing Batch File Names

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

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

[Next >>](#) [Return to Search Criteria](#) [Return to Search Results](#)

Press the **Next** button.

Review the list of reports that will be generated, and uncheck the box for any that you do not wish to include, then press the **Generate Batch** button.

The list below contains all of the reports that will be included in the Batch Report Generation. To exclude a report, remove the checkmark in the **Include** column. Once you have verified the list, click the **Generate Batch** button at the bottom of the screen to start batch processing.

Batch Report Generation 

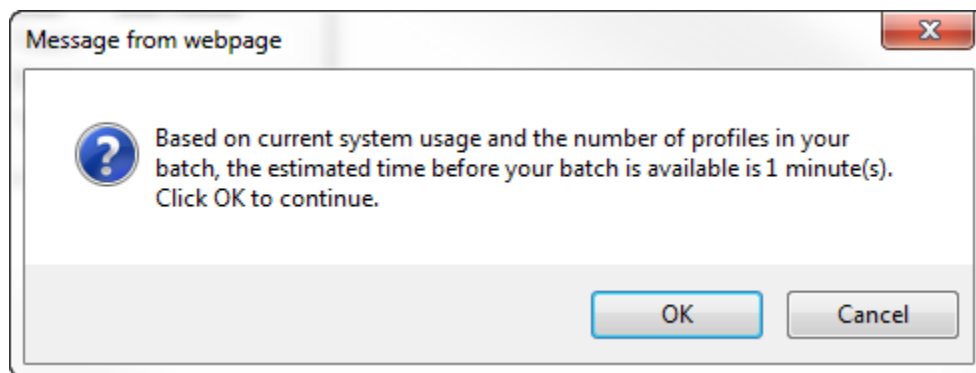
File Name: 20160105_092914.zip

[Check All](#) | [Uncheck All](#)


Include	Name	Product	Language	Folder	Sub Folder
<input checked="" type="checkbox"/>	Access Code 3.5 Created	Everything DiSC Work of Leaders	English	IT Team	
<input checked="" type="checkbox"/>	Bob2 3.5 Created	Everything DiSC Work of Leaders	English	IT Team	
<input checked="" type="checkbox"/>	3.5 Training Test	Everything DiSC Work of Leaders	English	IT Team	

[Generate Batch](#) [Return to Search Criteria](#) [Return to Search Results](#)

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



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):

`epicsub2@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

Menu location: **Manage Reports** ▶ **Batch Functions** ▶ **Create/Generate Comparison Reports**.

EPIC lets you know that this process will both CREATE the comparison reports (create new access codes) and then batch generate them for viewing/printing/download once the reports are created. This process should not be used to batch generate reports you have already created, as this will result in duplicate reports in EPIC. To generate comparison reports you have already created, use **Batch Functions** ▶ **Generate Reports for Download**.



IMPORTANT NOTICE

This EPIC feature **creates and batch generates** Everything DiSC Comparison reports. Each time you run this feature, new comparison reports are created.

If a Comparison Report for two individuals already exists in your EPIC account, use the Batch function "**Generate Reports for Download**" instead of "**Create/Generate Comparison Reports**" to create the zip file and download to your computer.

Do not display this message again

OK

To begin, go to **Manage Reports** ▶ **Batch Functions** ▶ **Create/Generate Comparison Reports**.

Step 1: Product Family and Product are pre-selected for you. Select a Language, then press the **Next** button.

Step 2: Select/create a folder in which to have EPIC place the new reports once they are created (Strongly recommended!).

Step 3: Select a **Report Creation Option** from the two (2) listed below:

Report Creation Options:

- Compare one individual with one or more members of a group
- Compare all members of the group to each other

Step 3 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.

Compare this individual...

Participant Set 1

Click the Search button and select one 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, The Five Behaviors Progress Report

Email	Name	Product	
epicsub3@inscapepublishing.com	Freddy Kulmbey	Everything DiSC Workplace Profile	X

Search

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.

...with these individuals

Participant Set 2

Click the Search button and select at least one 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, The Five Behaviors Progress Report

Email	Name	Product	
	Jill Macha	Everything DiSC Sales Profile	X
epicsub1@inscapepublishing.com	Jill Hauerbach	Everything DiSC Management Profile	X

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 at least two 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, The Five Behaviors Progress Report

Email	Name	Product	
	Jill Macha	Everything DiSC Sales Profile	X
epicsub3@inscapepublishing.com	Freddy Kulmbey	Everything DiSC Workplace Profile	X
epicsub1@inscapepublishing.com	Jill Hauerbach	Everything DiSC Management Profile	X

Search

Next >>

Step 4: 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.

Reports 


The following **Everything DiSC Comparison Report** Report(s) will be created. Unchecked Reports will not be created. Click the **Next** button to start the batch creation process.

[Check All](#) | [Uncheck All](#)

Report 1	Report 2
<input checked="" type="checkbox"/> Freddy Kulmbey working with Jill Macha	Jill Macha working with Freddy Kulmbey
<input checked="" type="checkbox"/> Freddy Kulmbey working with Jill Hauerbach	Jill Hauerbach working with Freddy Kulmbey

<< Back Next >>


Step 5: EPIC creates the Access Codes for the comparison reports and gives a status of "Success" for those successfully created. Press **Next** to continue.

Reports 

An information summary and status for each comparison report created is shown below.


Access Code	Participants	Product	Status
ZDSR88XNWC	Freddy Kulmbey, Jill Macha	Everything DiSC Comparison Report	Success
XVXP86W997	Freddy Kulmbey, Jill Hauerbach	Everything DiSC Comparison Report	Success

Next >>

 At this point, EPIC has created your comparison reports. The next steps in the process are for creating a batch download file of the reports for viewing/printing/download.

Step 6: EPIC displays the default file name, which you can choose to overwrite. Press the Customizing Batch File Names link for help naming your file. Press **Next** to continue.

File Name: 50 char. max

 [Customizing Batch File Names](#)

Step 7: Review the list of comparison reports to be batch generated, uncheck any you wish to omit, then press **Generate Batch**.

Batch Report Generation

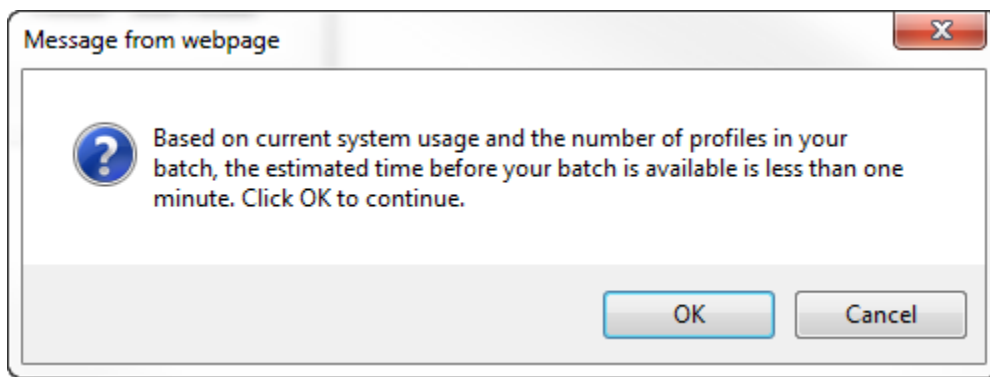
File Name: 20160105_094823.zip

[Check All](#) | [Uncheck All](#)

Include	Name	Product	Language	Folder	Sub Folder
<input checked="" type="checkbox"/>	Freddy Kulmbey, Jill Macha	Everything DiSC Comparison Report	English		
<input checked="" type="checkbox"/>	Freddy Kulmbey, Jill Hauerbach	Everything DiSC Comparison Report	English		

[Generate Batch](#)

Step 8: A message appears which gives an estimate of the time required for EPIC to generate the reports (varies). Press **OK** to continue.




Step 9: 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):

epicsub2@inscapepublishing.com

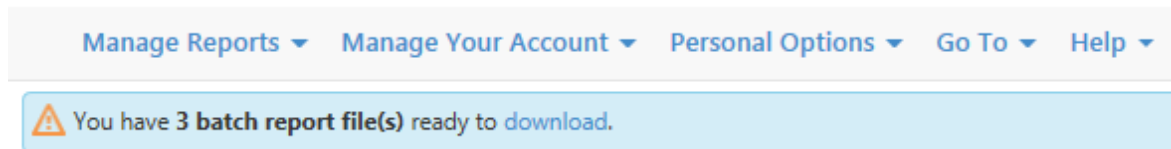
and a link to download the batch will appear on your EPIC homepage. You can also track the status of the batch generation process by going to the [batch download page](#).

 To navigate to your existing batch download files at any time, use the **Manage Reports** 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.






- The Manage Existing Download Files page displays information regarding zipped files, and links for downloading third-party software applications that will allow you to view your files.

Click on the **Download** link to open/save your **zipped*** batch file(s).


NOTE: This page is set to auto-refresh every 60 seconds.


Batch Downloads 

File	Product	Complete	Expires	
 20160105_092914.zip	Everything DiSC Work of Leaders (English)	3(3)	1/12/2016	✕
 20160105_094823.zip	Everything DiSC Comparison Report (English)	2(2)	1/12/2016	✕
 20160105_100250.zip	Everything DiSC Workplace Profile (English)	5(5)	1/12/2016	✕

***NOTE:** Zip files require an archive utility to extract the PDF files.
Windows users can either use the built-in Microsoft applications **Cabinet File Viewer** (Windows 95/98/NT) or **Compressed (zipped) Folders** (Windows 2000/XP/Vista/7) to access the zip file. Mac OS also has a built-in Compress/Expand utility.

In addition, the following third-party applications can be used to access the file:


WinZip • WinRAR • Stuffit for Windows


Stuffit for Mac

File Column

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.

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.

File	Product	Complete	Expires	Status
20160105_092914.zip	Everything DiSC Work of Leaders (English)	3(3)	1/12/2016	✘
20160105_094823.zip	Everything DiSC Comparison Report (English)	2(2)	1/12/2016	✘
Queued	Everything DiSC Workplace Profile (English)	—	—	✘ Starts in < 1m

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. The Status column displays an "X" that you can press to delete a set of batch files.

File	Product	Complete	Expires	Status
20160105_092914.zip	Everything DiSC Work of Leaders (English)	3(3)	1/12/2016	✘
20160105_094823.zip	Everything DiSC Comparison Report (English)	2(2)	1/12/2016	✘
Queued	Everything DiSC Workplace Profile (English)	—	—	✘ Starts in < 1m

Working...

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

File	Product	Complete	Expires	Status
20160105_092914.zip	Everything DiSC Work of Leaders (English)	3(3)	1/12/2016	✘
20160105_094823.zip	Everything DiSC Comparison Report (English)	2(2)	1/12/2016	✘
Working...	Everything DiSC Workplace Profile (English)	1	—	<div style="width: 20%; height: 10px; background-color: #007bff; border: 1px solid #007bff;"></div> 20%


See Also: [Batch Functions](#) ▶ [Generate Reports for Download](#)

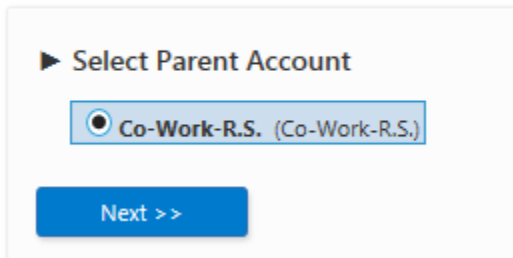
Managing Your Account


Purchase Credits from Parent Account

This function is available to Sub Account Super Administrator users when a credit limit has been enabled for the account.

1. Go to **Manage Your Account** ▶ **Purchase Credits from Parent Account**.
2. Select the Parent Account: choose the EPIC account from which you would like to purchase credits, then press the **Next** button.

Purchase Credits 




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**.

On the final page, a summary of the transaction is displayed.

See Also: *Process Sub Account Credit Purchases*


Transfer Credits to Parent Account

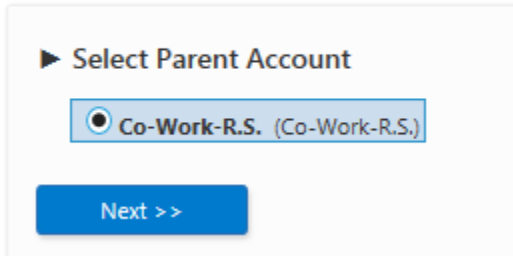
Sub Accounts have the ability to transfer credits to their Parent Account. This feature is available for all Sub Accounts and does not require activation.

 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.


Purchase Credits 



▶ Select Parent Account


Co-Work-R.S. (Co-Work-R.S.)


Next >>

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**.
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 (the online assessment has not yet been completed) can be unassigned, resulting in the credits being returned back to your EPIC account. The **Unassign Access Codes/Reclaim Credits** function is also how to reclaim pending credits for Respondents who have declined the [Data Privacy Consent Policy](#). EPIC has a couple of restrictions to protect the integrity multi-respondent and team reports:

 ED 363 for Leaders Access Codes have specific requirements for a pending status; as soon as the Leader and one Rater 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, but not completed team member profiles. Because the Annotated Team Report Access Code (the facilitator report) 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 automatically.

How To Unassign Access Codes

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


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 Privacy Consent Policy](#).

Data Protection Consent Policy: Show only those who declined the Data Protection Consent Policy

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.

Review the list of Access Codes on the confirmation screen:

- Uncheck the **Send a confirmation email...** box if you do not wish to send a confirmation email to Respondents.
-  Wiley 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.
- Use the **Uncheck All** link to deselect all Access Codes in the list.
- Check and uncheck individual boxes to select and deselect individual Access Codes.

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.

<input checked="" type="checkbox"/>	Everything DiSC Work of Leaders (Danish)	12/28/2015 11:47 AM	40
<input checked="" type="checkbox"/>	Bob3	The respondent has already begun this profile – unassign with caution!	12/28/2015 10:47 AM 10

Red = profile is part of an [Extract File](#).

<input checked="" type="checkbox"/>	Everything DiSC Management Profile (English)	12/24/2015 11:13 AM	25
<input checked="" type="checkbox"/>		This profile is part of an Extract File – unassign with caution!	12/24/2015 11:13 AM 25

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

<input checked="" type="checkbox"/>	Kyle K.	Everything DiSC Workplace Profile (English)	1/4/2016 3:55 PM	15
<input checked="" type="checkbox"/>	Lauren Hope	This profile has not yet been emailed – no email will be sent	1/4/2016 3:55 PM	15
<input checked="" type="checkbox"/>	J. Anders III	Everything DiSC Workplace Profile (English)	1/4/2016 3:55 PM	15

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

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

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

Press the plus sign **+** symbol to the left of **Details** to expand the list of affected Access Codes. Total Access Codes Unassigned and total credits unassigned values are displayed.

The pending Access Codes have been unassigned, and your credits have been reclaimed.

Details

Email Address	Name	Status
epicsub3@inscapepublishing.com	Lauren Hope	Access Code unassigned but no email was sent; the original email had not yet been sent.
epicsub4@inscapepublishing.com	J. Anders III	Access Code unassigned but no email was sent; the original email had not yet been sent.


Total Access Codes Unassigned: **2**

Previous Credit Balance: **3,854**

Total Credits Unassigned: **30**

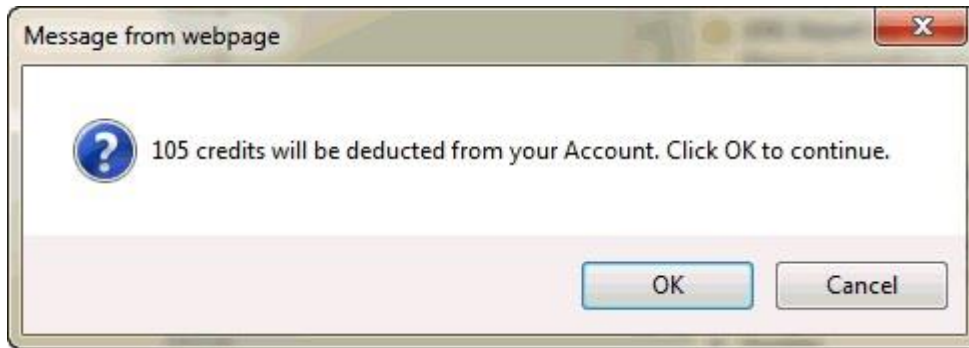
New Credit Balance: **3,884**

1.

6.  **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 deduction. 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

Folder Maintenance

- [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](#)
- [Records Moved from a Parent Account](#)

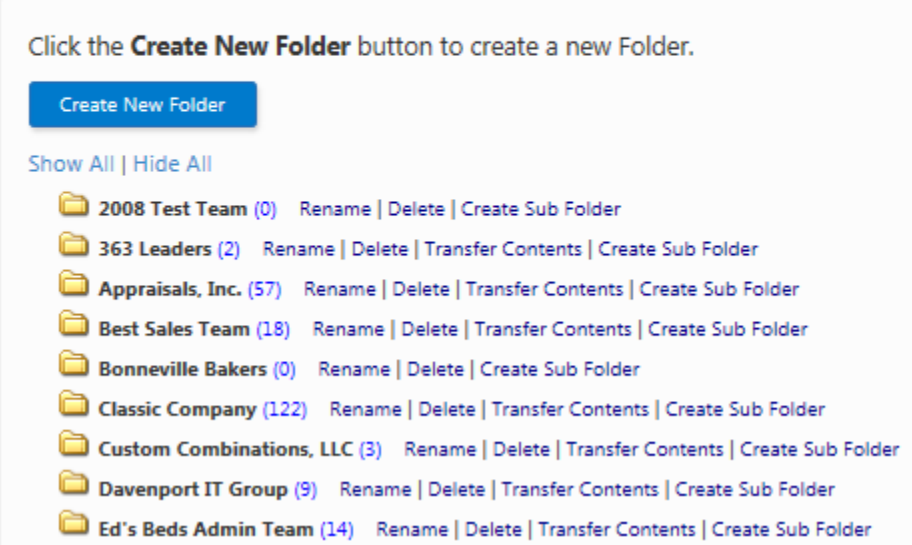
Organize your records into folders and subfolders to easily locate them using EPIC [search](#) functions.

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.

Manage Your Account

Folder Maintenance










Folder Options



Click the **Create New Folder** button to create a new Folder.

[Create New Folder](#)

[Show All](#) | [Hide All](#)

-  **2008 Test Team** (0) [Rename](#) | [Delete](#) | [Create Sub Folder](#)
-  **363 Leaders** (2) [Rename](#) | [Delete](#) | [Transfer Contents](#) | [Create Sub Folder](#)
-  **Appraisals, Inc.** (57) [Rename](#) | [Delete](#) | [Transfer Contents](#) | [Create Sub Folder](#)
-  **Best Sales Team** (18) [Rename](#) | [Delete](#) | [Transfer Contents](#) | [Create Sub Folder](#)
-  **Bonneville Bakers** (0) [Rename](#) | [Delete](#) | [Create Sub Folder](#)
-  **Classic Company** (122) [Rename](#) | [Delete](#) | [Transfer Contents](#) | [Create Sub Folder](#)
-  **Custom Combinations, LLC** (3) [Rename](#) | [Delete](#) | [Transfer Contents](#) | [Create Sub Folder](#)
-  **Davenport IT Group** (9) [Rename](#) | [Delete](#) | [Transfer Contents](#) | [Create Sub Folder](#)
-  **Ed's Beds Admin Team** (14) [Rename](#) | [Delete](#) | [Transfer Contents](#) | [Create Sub 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.

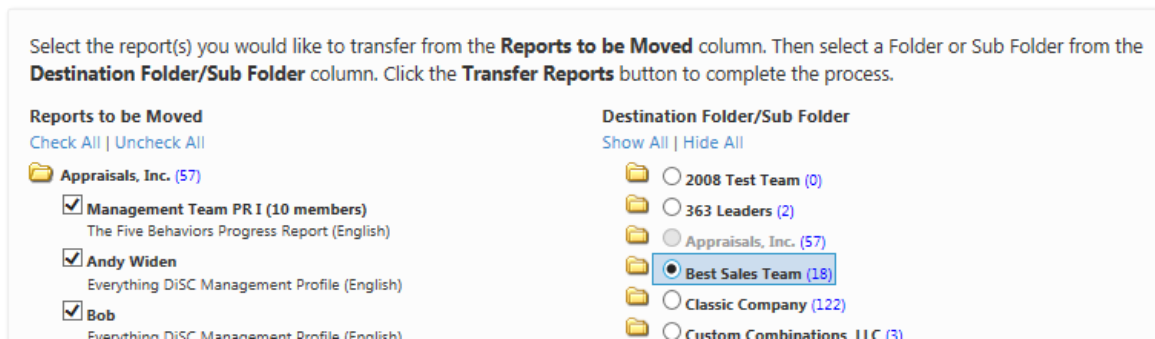
Check the box for a report in the **Reports to be Moved** column to include it in a transfer. Press the **Check All** and **Uncheck All** link in the **Reports to be Moved** column to select or deselect the entire report set.

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.








Manage Your Account

Transfer Folder Contents

Transfer Folder Contents 



Select the report(s) you would like to transfer from the **Reports to be Moved** column. Then select a Folder or Sub Folder from the **Destination Folder/Sub Folder** column. Click the **Transfer Reports** button to complete the process.

Reports to be Moved	Destination Folder/Sub Folder
Check All Uncheck All	Show All Hide All
 Appraisals, Inc. (57)	 2008 Test Team (0)
<input checked="" type="checkbox"/> Management Team PRI (10 members) The Five Behaviors Progress Report (English)	 363 Leaders (2)
<input checked="" type="checkbox"/> Andy Widen Everything DISC Management Profile (English)	 Appraisals, Inc. (57)
<input checked="" type="checkbox"/> Bob Everything DISC Management Profile (English)	 Best Sales Team (18)
	 Classic Company (122)
	 Custom Combinations 11C (3)

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.

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 in their EPIC account at **Manage Your Account** ▶ **Folder Maintenance**.

Once located in their own EPIC account, records moved to the Sub Account can be organized into the Sub Account's folder structure of choice using the **Transfer Contents** link. ([See More...](#))

Manage Users

Super Administrators can use the **Manage Your Account** ▶ **Manage Users** function to add new EPIC users to your EPIC account and to edit existing user's information. This menu item will not be visible to Administrators.

EPIC User Levels

There are two levels of users in EPIC. Users can be assigned as either a **Super Administrator** (Super Admin) or an **Administrator** (Admin). Each account must have at least one Super Admin but can have multiple. An account can also have multiple Admins, or none at all.

EPIC Super Administrator: an EPIC Primary or Sub account user with full access to all EPIC functionality. The first user created in an EPIC account is a Super Administrator. The **Super Admin** can do everything in EPIC, including adding, deleting, and editing user information for other Super Admins and Admins. Only Super Admins can change the company's information under [Personal Options](#) ▶ [View/Edit Account Information](#).

EPIC Administrator: an EPIC Primary or Sub account user with fewer account permissions than a Super Administrator. Administrator users can do everything that the Super Administrator can do except purchase credits, edit the company's personal options, and manage users.

Add Users

To create a new EPIC user, enter the user's name, choose a unique username for the individual, enter the user's email address, and select the user level (Super Administrator or Administrator) from the drop down menu. You will also need to determine whether they will receive [email notifications](#) when profiles are completed.

Manage Your Account
Manage Users

Add Users

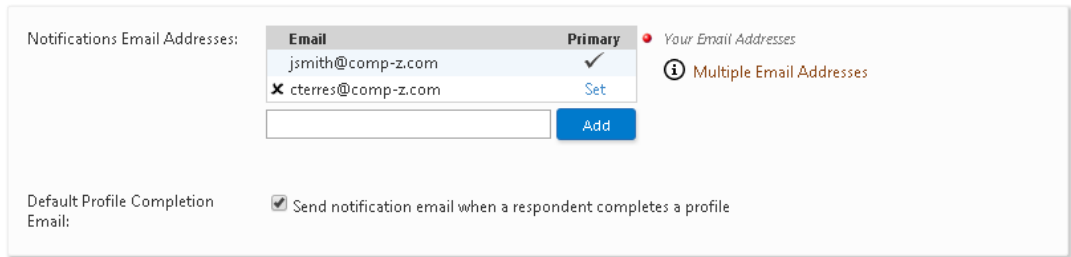
Name	<input type="text"/>	<i>Enter user's full name</i>
Username	<input type="text"/>	<i>Choose a unique username</i>
Email	<input type="text"/>	<i>Enter the user's email address</i>
User Level	<input type="text" value="Super Administrator"/>	<i>Choose a level for the user</i>
<input checked="" type="checkbox"/> Send notification email when a respondent completes a profile		
<input type="button" value="Add User"/>		

Click the **Add User** button to complete

The email address entered for a new user will be used for password creation and password reset email notifications.

The email address entered for a new user is automatically added to the Notifications Email Addresses list in **System Notifications**.

System Notifications



Notifications Email Addresses:

Email	Primary
jsmith@comp-z.com	✓
✗ cterres@comp-z.com	Set

Default Profile Completion Email: Send notification email when a respondent completes a profile

Your Email Addresses
Multiple Email Addresses

Users whose email address is in the notification list will also receive the system notifications such as low credit balance reminders, Sub Account creation notifications, etc.

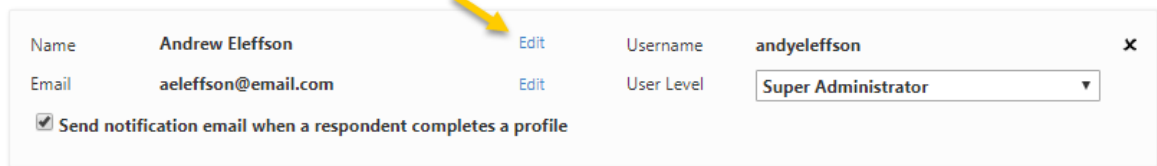
If an Administrator level user does not want to receive these additional email notifications, they will need to ask a Super Administrator to remove their email address from the Notification Email Addresses list, which is pictured above.

View All Users

Super Administrators are able to view and edit user information for the other users in their EPIC account. When a change is made to a user's personal information through **Manage Your Account** ▶ **Manage Users**, a notification email will be sent to that user, so they are aware of the change.

To edit a user's Name or Email, click the **Edit** link to its right.

View All Users



Name	Andrew Eleffson	Edit	Username	andyeleffson	✗
Email	aeleffson@email.com	Edit	User Level	Super Administrator	▼

Send notification email when a respondent completes a profile

Enter the correct information in the text box provided and click **Save** to accept the changes or **Cancel** to discard them.

View All Users

Name	<input type="text" value="Andrew Eleffson"/>	Save Cancel	Username	andyeleffson	✕
Email	aeleffson@email.com	Edit	User Level	<input type="text" value="Super Administrator"/>	
<input checked="" type="checkbox"/> Send notification email when a respondent completes a profile					

The User Level can be edited through the drop down menu.

View All Users

Name	Andrew Eleffson	Edit	Username	andyeleffson	✕
Email	aeleffson@email.com	Edit	User Level	<input type="text" value="Super Administrator"/>	
<input checked="" type="checkbox"/> Send notification email when a respondent completes a profile					

Super Administrator


Administrator


All users, Super Administrators and Administrators, can edit their own user information through **Personal Options** ▶ **My Personal Settings**.




Menu location: **Manage Your Account** ▶ **Manage Users**

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:
 - **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.
 - **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.
 - 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.

-  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.
-  Billing and/or payment is not managed by EPIC.
- 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](#)
- **Profile Completion Report:** Runs the [Sub Account Profile Completion - Summary Report](#) for the selected Sub Account.
- **Credit Transactions Report:** Runs the [Sub Account Credit Transactions Report](#) for the selected Sub Account.
- **Close/Activate Account:** Close inactive Sub Accounts to hide them from view. Closed Sub Accounts can be viewed under **Manage Your Account** ▶ [Manage Individual Sub Accounts](#) by checking the **Include Closed Accounts** check box. Closed accounts can be activated again from this function if desired.

Add/Remove Products

Use this function to add or remove products for multiple Sub Accounts at the same time.

To begin, go to **Manage Your Account** ▶ **Sub Accounts** ▶ **Add/Remove Products**.

1. Select either the **Add** or the **Remove** button.

▶ Select the action you would like to perform.

Add to selected sub accounts **Remove** from selected sub accounts

- From the column on the left, check the boxes for the products you wish to add or remove. Use the plus symbol next to a product family to expand the list and view/select more products and languages.

► Check the products which will be added or removed.

Show All | Hide All | Check All | Uncheck All

- Personal Listening
- Team Dimensions
- Time Mastery
- 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

- In the column on the right, choose the Sub Account(s) for which you would like to add or remove the selected products.

► Check the sub accounts which will be affected.



Show All | Hide All | Check All | Uncheck All

- Co-Work-R.S.
 - Anthony's Amazing Training Company (August)
 - Champion Atmosphere (Charlie Moore)
- Dashinn Deliverv (Dash & Deliver)

- At the bottom of the page, press the **Next** button to apply your changes and review the confirmation page. A summary of products and Sub Accounts affected is displayed. 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

Profiles can be moved down a level to any Sub Account within your hierarchy, but they must be completed in order to be moved. Completion status for  ED 363 for Leaders 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**. A brief overview of the 3 step process is provided. 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 \oplus 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.

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 in their EPIC account at **Manage Your Account** ▶ **Folder Maintenance**.

Once located in their own EPIC account, records moved to the Sub Account can be organized into the Sub Account's folder structure of choice using the **Transfer Contents** link. ([See More...](#))

Move Records Between Your Sub Accounts

To move records between your Sub Accounts, contact Partner Care to have this feature enabled. Please be prepared to provide written evidence that an agreement has been made between you and the Sub Account who's records you wish to move.

Once the feature is enabled, the record moving process is the same as that listed above, but you will have the added option to search for and move records which exist within the Sub Accounts Partner Care has enabled.

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 MyEverythingDiSC usage.

Select a report below to see more:

- [Sub Account Credit Transactions Report](#)
- [Profile Completion - Detail Report](#)
- [Profile Completion - Summary Report](#)
- [MyEverythingDiSC 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 \oplus 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 \oplus 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](#)

MyEverythingDiSC Usage Report (Sub Accounts)

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

MyEverythingDiSC

See Also: [Sub 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 MyEverythingDiSC 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 for Leaders Status Report**
-  **Team Status Report**
- **MyEverythingDiSC Status Report**
- **MyEverythingDiSC 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.

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.

Team Status Report

Manage Your Account ▶ Account Activity Reports ▶ Team Status Report

Choose a Five Behaviors product from the Product drop-down list, then press the **View Reports** button to view all of the Five Behaviors access codes for that product. 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.

MyEverythingDiSC Status Report

MyEverythingDiSC

MyEverythingDiSC Usage Report

MyEverythingDiSC

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.

Personal Options

View/Edit Account Information

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

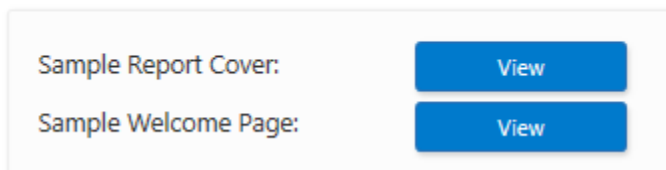
Super Administrator users are able to edit all of the **EPIC Account Information**. Administrator level users are able to view the **EPIC Account Information** in view only mode.

See Also: [User Level](#)

 **Important:** Press the **Save Changes** button after any changes to apply your changes.

View Samples

View Samples



- 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.
- 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.


Report Cover 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
- The "Provided By" branding on [MyEverythingDiSC](#) accounts created by your Respondents

 **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.

Company Information

Account ID:

Your Account ID is system generated, when your account is created. It is your unique account identifier and cannot be changed.

Company Name

Required Field. Enter your company name.

The company name entered here is used to identify your company within EPIC activities such as Activity Reports and Manage Individual Sub Accounts.

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 on the website where they complete the online assessment.

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. Press the **Upload Logo** button to locate, select and upload your logo to EPIC. Use the **Delete Logo** link 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

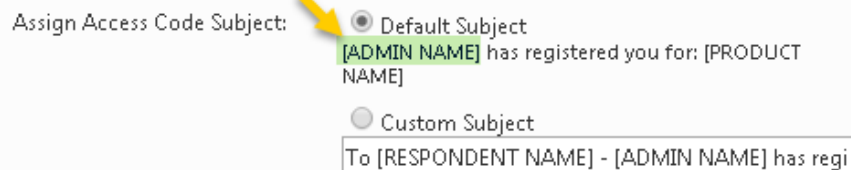
If your logo is smaller or larger than the recommend size, the system will automatically size the logo to fit the available space on the cover of the profile.

Emails Sent From My EPIC Account

Each EPIC account will have one shared **Outgoing "From" Name** and one shared **Outgoing Email Username**. Designating these names essentially creates the account's outgoing email address. This is the email address that people will see when they receive an email sent from your EPIC account.

Administrator Name

Required Field. Enter the name of the primary contact for your account. 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.



Assign Access Code Subject:

Default Subject
[ADMIN NAME] has registered you for: [PRODUCT NAME]

Custom Subject
To [RESPONDENT NAME] - [ADMIN NAME] has regi

Outgoing "From" Name

This is the "Friendly" name that appears before the bracketed email address. This field is optional and does not need to be unique. **Your HR Team** is used in the example below.

Outgoing Email Username

The Outgoing Email Username is displayed before @inscape-epic.com. This does need to be unique. It is recommended that you select something that represents your account or company for this username. The example uses **company-z** as the outgoing email username.

Email Display

A preview of your email address and "From" name is provided in the Email Display field.

Based on a the from name **Your HR Team** and the outgoing email username **company-z**, emails for this sample account would come from

Your HR Team<**company-z**@inscape-epic.com.


Email Options

Outgoing "From" Name:	<input type="text" value="Your HR Team"/>	<small>"Friendly" name which appears to email recipients</small>
Outgoing Email Username:	<input type="text" value="company-z"/> <input type="button" value="Add"/>	<small>Appears before the @ in the system email address. Must be unique.</small>
Email Display:	Your HR Team <company-z@inscape-epic.com>	

Assign Access Code Subject

Create a Custom Subject for Access Code emails 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, and ED 363 for Leaders can be changed by choosing to send a custom subject and email to respondents during Access Code creation. ([See More...](#))

EPIC Email System Variable

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.

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](#).

Email EPIC System Notifications to:

Use the [System Notifications](#) section to determine who will receive system notification emails. EPIC uses email to notify you when a process has completed, to send low credit reminders, Sub Account creation notices, and etc. Each email address in the [Notification Email Addresses](#) list will receive these.

Notifications Email Addresses

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**.

If multiple email addresses exist, one must be designated as the primary. Bounce-back messages will only be sent to the primary email address, which is jsmith@comp-z.com in this example.

Designate a new primary address by clicking **Set**. (**Multiple Email Addresses**)

EPIC uses these email addresses to notify you when a process has completed, to send password reset messages, and to auto-forward undeliverable bounce-back notifications. You can 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. This is because some email servers require a 1:1 relationship between the sender address and the auto-forward address. These servers will flag multiple auto-forward addresses as abnormal or suspicious behavior. The result would be that no bounce-back email is sent to any of the email addresses, thus you wouldn't be notified if you'd assigned an Access Code to an invalid address.

System Notifications

Notifications Email Addresses:

Email	Primary
jsmith@comp-z.com	✓
csterres@comp-z.com	Set

Default Profile Completion Email: Send notification email when a respondent completes a profile


Your Email Addresses Multiple Email Addresses

Changing a user's email address (either by the user through **Personal Options** ▶ **My Personal Settings** or by a Super Administrator through the **Manage Your Account** ▶ **Manage Users** function) will also replace that user's email address in the Notification Email Addresses list, pictured above.

Also note, the same email address cannot be used for more than one user in the same account.

Default Profile Completion Email

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**.

Note: The completion notification for  ED 363 reports will occur only when the Leader and all assigned Raters have completed their online assessments.

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(s) that the Credit balance has reached this threshold.

See Also: [Credits](#)

Language Options

Site Language

Set the language used on the EPIC site.

Default Product Language

The language you choose will be used as your default product language whenever you use the search criteria fields. EPIC will automatically chose this language to save you a step, but you are able to override this choice at any time.

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

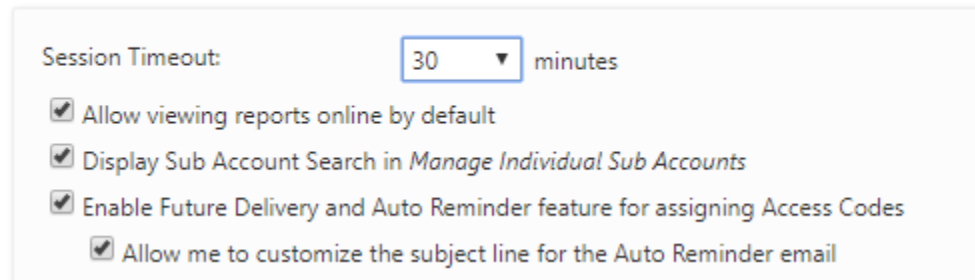
Time Zone Settings

This required Field allows you to set up a time zone to be used with [Future Delivery and Auto Reminder](#) emails.

Advanced Account Options

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

Advanced Options



Session Timeout: minutes

- Allow viewing reports online by default
- Display Sub Account Search in *Manage Individual Sub Accounts*
- Enable Future Delivery and Auto Reminder feature for assigning Access Codes
- Allow me to customize the subject line for the Auto Reminder email

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.

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 Username, 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.

Delivery and Auto Reminder Options

Time Zone Information:	 Important information regarding time zones
Deliver email:	<input checked="" type="radio"/> Immediately <input type="radio"/> On this date
Send reminder:	<input checked="" type="radio"/> Never <input type="radio"/> If not completed by



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.

Delivery and Auto Reminder Options

Time Zone Information:	 Important information regarding time zones
Deliver email:	<input checked="" type="radio"/> Immediately <input type="radio"/> On this date
Send reminder:	<input type="radio"/> Never <input checked="" type="radio"/> If not completed by <input type="text" value="11/10/2015"/>  <input type="text" value="12"/> <input type="text" value="45"/> <input type="text" value="PM"/> (GMT - 6)
Custom Reminder Subject:	<input checked="" type="checkbox"/> Use Custom Reminder Subject <input type="text" value="[RESPONDENT], please complete your [PRODUCT X"/>
EPIC Email System Variable:	<input type="text" value="- Select a System Variable -"/> <input type="button" value="Insert"/>
To add an EPIC system variable to the Custom Reminder 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.	
Group ID:	<input type="text" value="Everything DiSC Workplace Profile (English) 10/27/2"/>

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

My Personal Settings

To change your personal user information, go to **Personal Options** ▶ **My Personal Settings**.

In the **Select a function to perform** box, choose to change your Password, your Username, both your Password and Username, or Name and/or Email Settings. The page changes to display the correct fields depending on what you choose to change.

Change Your Password

Go to **Personal Options** ▶ **My Personal Settings**.

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 9 characters long
- Cannot be the same as your Username

To increase the strength of your password you should:

- Include both lower and upper case letters
- Include at least one number
- Include at least one symbol: ! @ # \$ % ^ & * () - _
- Increase the length beyond the 9 character minimum to 12 or more characters

Change Your Username

Go to **Personal Options** ▶ **My Personal Settings**. Enter a new Username and your existing Password, then press **Save** to update your account information.

- Usernames in EPIC must be unique; if the Username 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 Username (e.g. jsmith01, 1jsmith) will, in most cases, create the unique ID required by the system.

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

Change Your Name and/or Email Settings

Go to **Personal Options** ▶ **My Personal Settings** and select **Change Name/Email Settings** from the drop down menu. Edit your Name and/or Email Address in the text boxes provided.

Check or uncheck the **Notify me via email when a respondent completes a profile** box if you wish to change this option. When checked, an email will be sent to your email address every time a Respondent completes an online assessment. Changing this setting in **My Personal Settings** will only apply to your email address and will not affect other users.

Press **Save** to update your account information. A notification email will be sent to the Super Administrator(s) informing them of your changes.

Menu location: **Personal Options** ▶ **My Personal Settings**

Manage Custom Messages

On This Page:

- [Your Custom Message Library](#)
- [Create a New Custom Message](#)
- [Test Your Custom Messages Before Use](#)
- [System Variables \(Dynamic Fields\)](#)
- [HTML Editor](#)
- [Create a Custom Subject Line](#)

See Also: [Use a Custom Email Message](#)

See Also: [MyEverythingDiSC Custom Messages](#)

Custom messages can be used in EPIC when:

- Assigning, resending, and unassigning Access Codes
- Transferring credits

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.

1. Give your custom email message a title.
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

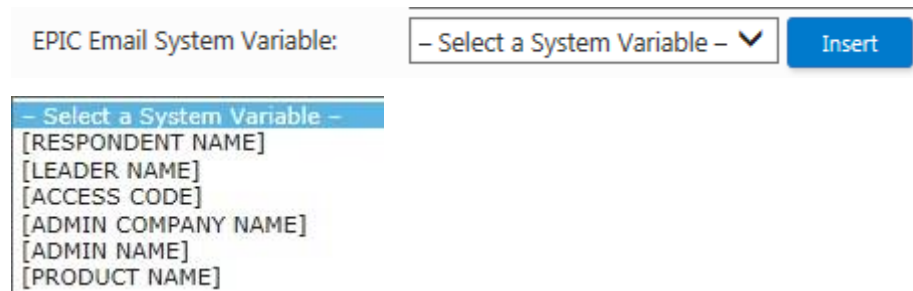
To test your messages before using them, create an Access Code and send it to yourself using your new custom message to verify the layout of the message. Once you have received and reviewed your message, Unassign the Access Code to reclaim the credits. (See [Use a Custom Email Message](#))

System Variables (Dynamic Fields)

Personalize your custom email messages using the six (6) EPIC System Variables: [RESPONDENT NAME], [LEADER NAME], [ACCESS CODE], [ADMIN COMPANY NAME], [ADMIN NAME], and [PRODUCT NAME].

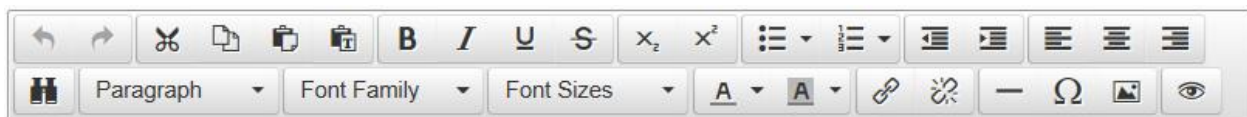
Before the email is sent, EPIC replaces the field placeholder with the actual Respondent Name, Leader Name, etc.

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.



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.



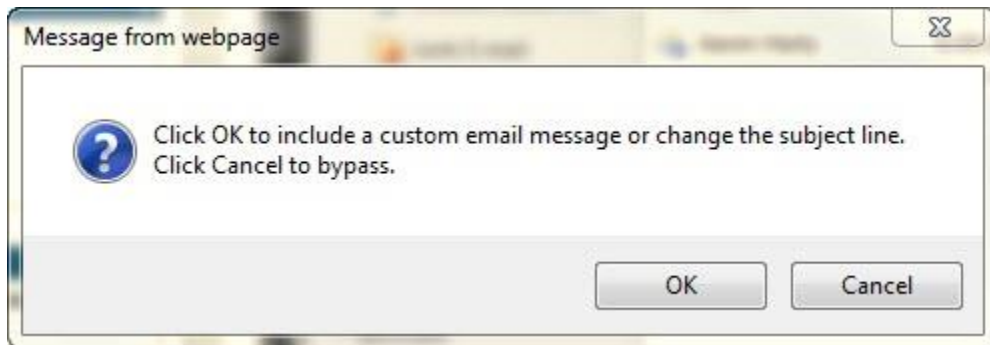
Create a Custom Subject Line

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 is displayed. Press the **OK** button to use a custom message, or press **Cancel** to allow EPIC to send the default message and subject line.



[363](#) See Also: [Custom Messages for ED 363 for Leaders 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. [Example](#)

Custom Email Message

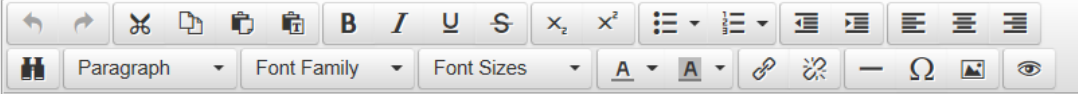
Default Subject: [ADMIN NAME] has registered you for: [PRODUCT NAME]

Custom Subject:

Note: The Default Subject will be translated based on the language of the individual Access Code. The Custom Email Subject will not be translated if selected.

Custom Message:

- Inscapc Product Announcements
- Five Behaviors Custom Messages
- MyEverythingDiSC.com Custom Messages
- Misc Test Folder
- Dev 2008 Folder



- Default Email Subject and Custom Text:** Select the radio button for **Default Subject**, and choose or create custom message text.
Example

Custom Email Message

Default Subject: [ADMIN NAME] has registered you for: [PRODUCT NAME]

Custom Subject:

Note: The Default Subject will be translated based on the language of the individual Access Code. The Custom Email Subject will not be translated if selected.

Custom Message:


- Inscape Product Announcements
- Five Behaviors Custom Messages
- MyEverythingDiSC.com Custom Messages
- Misc Test Folder
- Dev 2008 Folder

[RESPONDENT NAME],

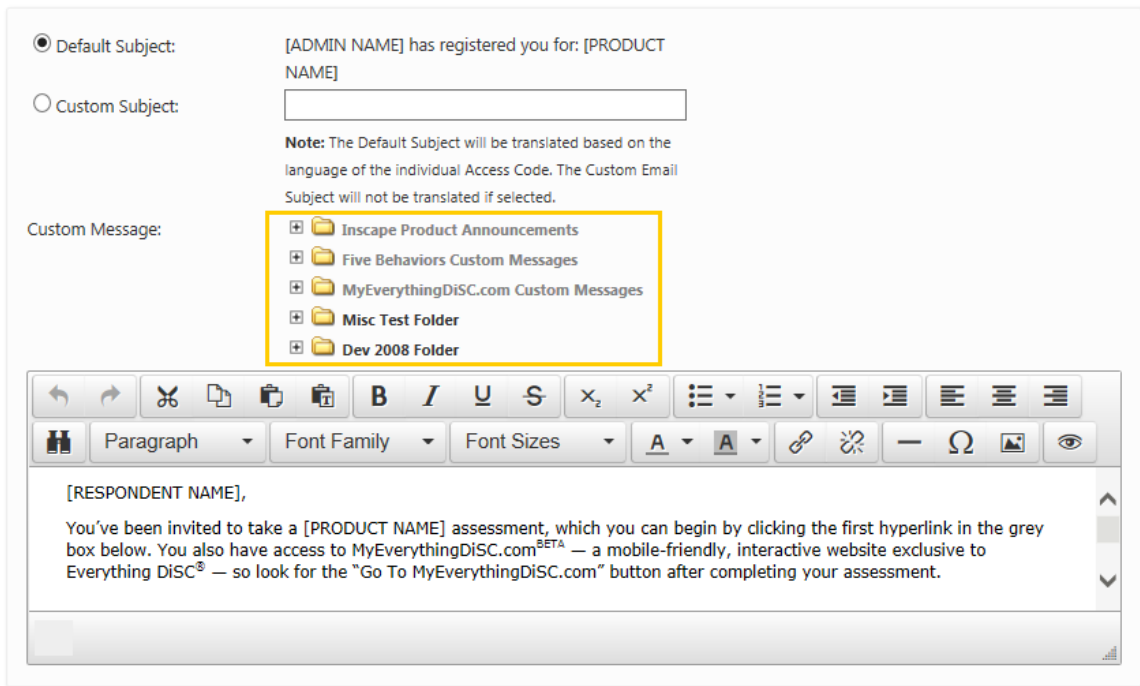
You've been invited to take a [PRODUCT NAME] assessment, which you can begin by clicking the first hyperlink in the grey box below. You also have access to MyEverythingDiSC.com^{BETA} — a mobile-friendly, interactive website exclusive to Everything DiSC[®] — so look for the "Go To MyEverythingDiSC.com" button after completing your assessment.

- 3. Custom Email Subject and Default Text:** Use your custom subject. 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 custom subject, 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. [Related Image](#)

Custom Email Message



OK


Create and Use an "On-the-fly" Custom Email Message

- Add and edit text in the text box area to create a one-time unique email message.

MyEverythingDiSC Custom Messages

MyEverythingDiSC

Custom Messages for ED 363 for Leaders Reports

 Everything DiSC 363 for Leaders reports allow you to send a unique message to the Leader and a separate unique message to the Raters.

Default Subject

Select the Default Subject option and the following email subjects will be sent:

- The default Leader subject is "Your leadership program - Action Requested"
- The default Rater subject is "Request for your input on [LEADER NAME], where the Leader's name is automatically populated for you.

Custom Subject

Simply enter text to send the same message to each recipient.

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].

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.

EPIC Email System Variable:

- Select a System Variable -

[RESPONDENT NAME]


[LEADER NAME]

[ACCESS CODE]

[ADMIN COMPANY NAME]

[ADMIN NAME]

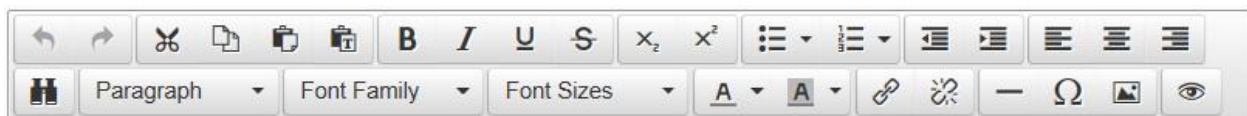
[PRODUCT NAME]

 Note that default email subjects are translated based on the product language, but custom subjects are not translated.

Custom Message

Choose a pre-designed custom message from your [Custom Message Library](#), or create a new message to recipients.

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.



Review and Send

Your email subject line and message text will be sent exactly as you enter it. Review the text carefully, and press the **OK** button to send your messages.

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. This option will be available to you during report creation and editing when you have created at least one (1) tailored report of the similar product type.

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.

Select Product/Report 

Select a Product Family, Product, and Language, then click the **Next** button to continue.

Product Family:	<input type="text" value="Everything DiSC"/>
Product:	<input type="text" value="Everything DiSC Sales Profile"/>
Language:	<input type="text" value="English"/>

[Next >>](#)

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 **highlighted in yellow**. These populate with dynamic text such as [RESPONDENT NAME] when the email message is created in EPIC.

MyEverythingDiSC Functions

EPIC users with qualifying Everything DiSC products (Workplace, Sales, Management, and Work of Leaders) have two (2) [MyEverythingDiSC](#) menu items available: **Add/Remove Options** and **Resend Account Information**.

These functions perform the same as [Resend Login Information](#) and [Batch Edit Report Options](#), but use preset search criteria to help you quickly locate only reports with MyEverythingDiSC options.

Add/Remove Options

MyEverythingDiSC

See Also: [Batch Functions](#) ▶ [Edit Existing Reports](#)

Resend Account Information

Use this function to send a reminder email to Respondents who have an Everything DiSC profile with MyEverythingDiSC options, but who have not yet created/activated a MyEverythingDiSC account. EPIC search criteria for this function are preset to find this specific set of Everything DiSC profiles.

Go to **Manage Reports** ▶ **MyEverythingDiSC Functions** ▶ **Resend Account Information** and use [Search](#) to locate and select the profiles for which you wish to send reminder 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](#)



MyEverythingDiSC is a mobile-friendly, interactive learning portal that is exclusive to the Everything DiSC® solutions. An important capstone to any learning program, this follow-up site cements the lessons that Respondents are introduced to in their Everything DiSC profiles and classroom experiences, extending their learning into the future. MyEverythingDiSC enables your EPIC Respondents to actively incorporate their new DiSC® knowledge into their daily work. It offers them insights into their own DiSC style and strategies for working and communicating with others.

[Read more about how it works and Respondent takeaways...](#)

How it Works

Use of the MyEverythingDiSC website requires Respondents to create an account and import their completed Everything DiSC profile. You, their EPIC administrator, can turn on access to all or part of MyEverythingDiSC at any point of the assessment process, or as a follow-up after their classroom training. Importing a profile is easy to do – see our step-by-step instructions for importing a profile into MyEverythingDiSC.

Your Respondents are able to access their profile, discover more about their style, gain insights to working with customers through Customer Interaction Maps (exclusive to the Everything DiSC® Sales profile), and view Comparisons with other MyEverythingDiSC site users. Both individual and group comparisons can be created, and both offer content exclusive to MyEverythingDiSC.

Respondent Takeaways

- Access profiles anytime, on any device
- Deepen understanding of the theory and research behind Everything DiSC®
- Learn more about how their DiSC styles impact workplace preferences
- Invite others to compare DiSC styles—and accept invites to compare from others
- Create Customer Interaction Maps for improving sales relationships (Exclusive to Everything DiSC® Sales)

What are the MyEverythingDiSC options in EPIC?

Once an EPIC account holder has this feature enabled, there are 4 MyEverythingDiSC options that can be added to Everything DiSC reports:

Option 1: Access to the MyEverythingDiSC site

This basic access to the site allows your EPIC Respondents to create and activate an account. An activated account results in their Everything DiSC report being automatically uploaded - no extra steps required.

Option 2: My Style

The My Style page in MyEverythingDiSC is personalized to the Respondent's DiSC style. The interactive DiSC map provides insight regarding their interaction, environment, and communication preferences for each of the behaviors displayed around the DiSC map. Respondents also find out how aligned they are to their style; what their most and least expected assessment answers are for a person with their particular DiSC style.

Option 3: My Comparisons

- Respondents can create 1:1 Comparisons and Group Comparisons with up to nine (9) other people.
- Site-exclusive content available through My Comparisons provides Respondents with useful tips on interacting with their coworkers based on their DiSC styles. These insights include managing tension, presenting information, getting buy-in, providing/receiving feedback, and getting to know each other.
- Respondents choose which Comparisons they are included in by accepting invitations, and can choose to exclude their name and email address from the search results of other MyEverythingDiSC participants.
- Your Respondents can download and print an EverythingDiSC Comparison Report (just like those generated in EPIC) for any of their 1:1 Comparisons.

Option 4: My Customers

- My Customers is available only to Respondents with an Everything DiSC Sales profile.
- Respondents use this valuable tool to create Customer Interaction Maps, which help them understand important

similarities and differences between their selling style and their customer's buying style in order to adapt to that customer's needs.

- Respondents have the ability to create and access an endless number of Customer Interaction Maps on MyEverythingDiSC - from anywhere, anytime.


Give MyEverythingDiSC Options to Your New & Existing Respondents

You have the ability to create new Everything DiSC profiles that give your Respondents access to MyEverythingDiSC, which will be communicated to them on the last page of the online assessment. You can also add and remove general access and any of the options at any time - for both completed and pending reports. EPIC provides you the flexibility to turn MyEverythingDiSC options, as well as the ability to view their EverythingDiSC report, on and off in any combination of ways - you get to decide the implementation that works best for you and your client.

Determine Which Options to Give Respondents

Depending on your training facilitation style, you may choose give Respondents basic access to MyEverythingDiSC and add the *My Style*, *My Comparisons*, and *My Customers* options at a later date. Or maybe you would like to showcase MyEverythingDiSC during training and wait to give your Respondents access until after the classroom? EPIC sends an email each time you add an option to a Respondent's completed report that benefits them in some way. This can include a change which allows them to view their report online or one which gives them additional access in MyEverythingDiSC - making it easy to incorporate MyEverythingDiSC into any part of your training program.

Note that the **View Report** option does not affect your Respondents' ability to access MyEverythingDiSC. When **View Report** is set to **No**, Respondents will still be able to create a MyEverythingDiSC account and access any features you have enabled, but they will not be able to generate their full report inside of the site.

 Also note that giving your Respondents the My Style option will allow them to see their DiSC style even if **View Report** is set to No.

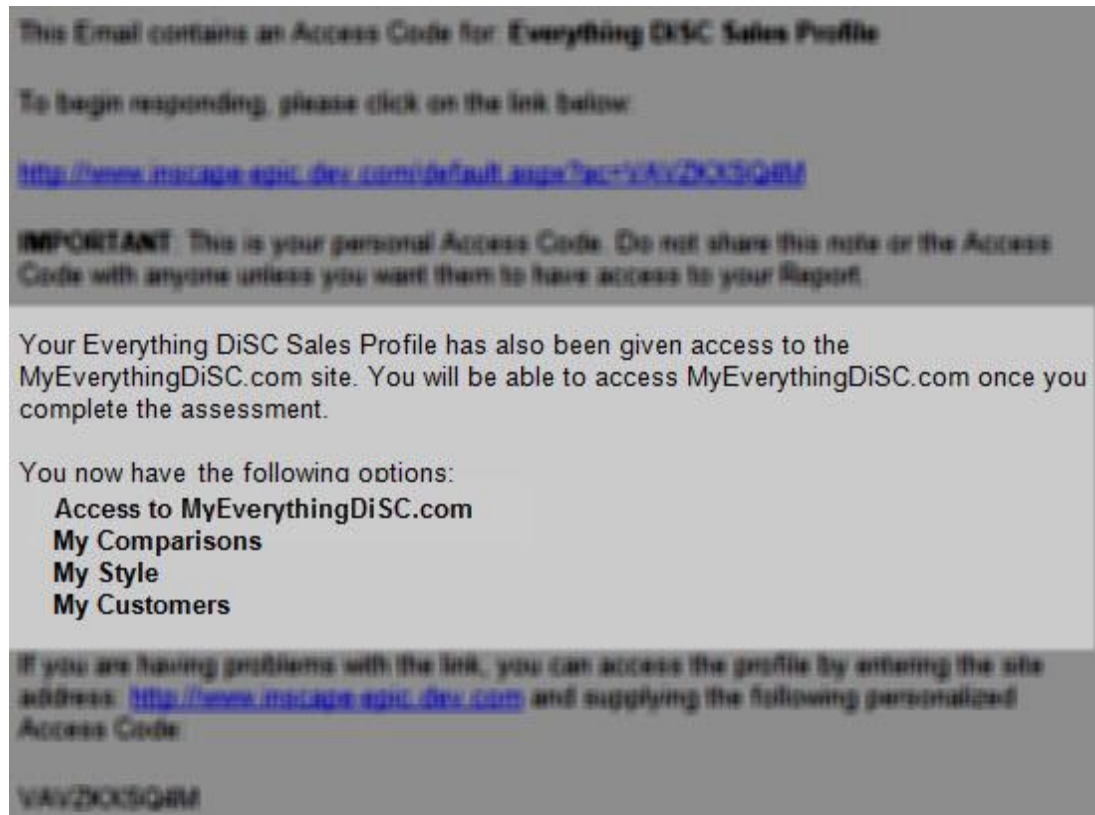
Create new Profiles with MyEverythingDiSC Options

When the MyEverythingDiSC features have been enabled for your EPIC account, they are displayed as Report Options while you are creating new reports. You can choose to give Respondents just basic access to the site, or basic access plus any combination of available options.

To create new reports with MyEverythingDiSC options, go to **Manage Reports** ▶ **Create a New Report/Issue Access Codes** and choose one of the qualifying Everything DiSC products (Workplace, Sales, Management, Work of Leaders, and 363 for Leaders). Continue through the steps for [new report creation](#), which ends in an email to Respondents.

What does the Respondent see?

The Access Code email sent to your Respondents includes a summary of MyEverythingDiSC options along with the link to their online assessment as shown here:



The last page of the online assessment includes a link to MyEverythingDiSC, where Respondents create an account. MyEverythingDiSC sends them an account activation email to verify their email address. When the Respondent clicks on the link in the

account activation email, they are automatically logged into the new account with their report already uploaded.

Add or Remove Options for Many Reports

Go to **MyEverythingDiSC Functions** ▶ **Add/Remove Options** and select an Everything DiSC product.

The Batch Edit Report Options page is displayed, showing the options associated with the product you chose.

Set **View Report Online** to **Yes** or **No** or default to **No Change** (setting does not affect access to MyEverythingDiSC).

Add or Remove Options

MyEverythingDiSC Options [What is this?](#)

Access to MyEverythingDiSC [Tell me more...](#)

Enable Remove No change

My Comparisons

Enable Remove No change

My Style

Enable Remove No change

My Customers


Enable Remove No change

To Add: First select the **Enable** button for **Access to MyEverythingDiSC**, and then select the individual **Enable** buttons for the options you wish to enable for the Respondent (My Style, My Comparisons, My Customers).

To Remove: Select the radio button in the **Remove** column for the listed option, or select the **Remove** button beneath **Access to MyEverythingDiSC** to quickly remove access to the site as well as all available options.

Press the **Add Reports** button to search for and select the reports for which you wish to add or remove MyEverythingDiSC options (repeat this step to select additional reports).

The **Report List** section displays the selected reports and the current **View Report Online** and **MyEverythingDiSC** options assigned to them. Review the list of added reports and delete any by selecting the "X" to the left of the email address.

 To apply your selected changes, press the **Update Report Options** button.

Press **OK** to include a custom email message, or **Cancel** to send the default message.

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**).

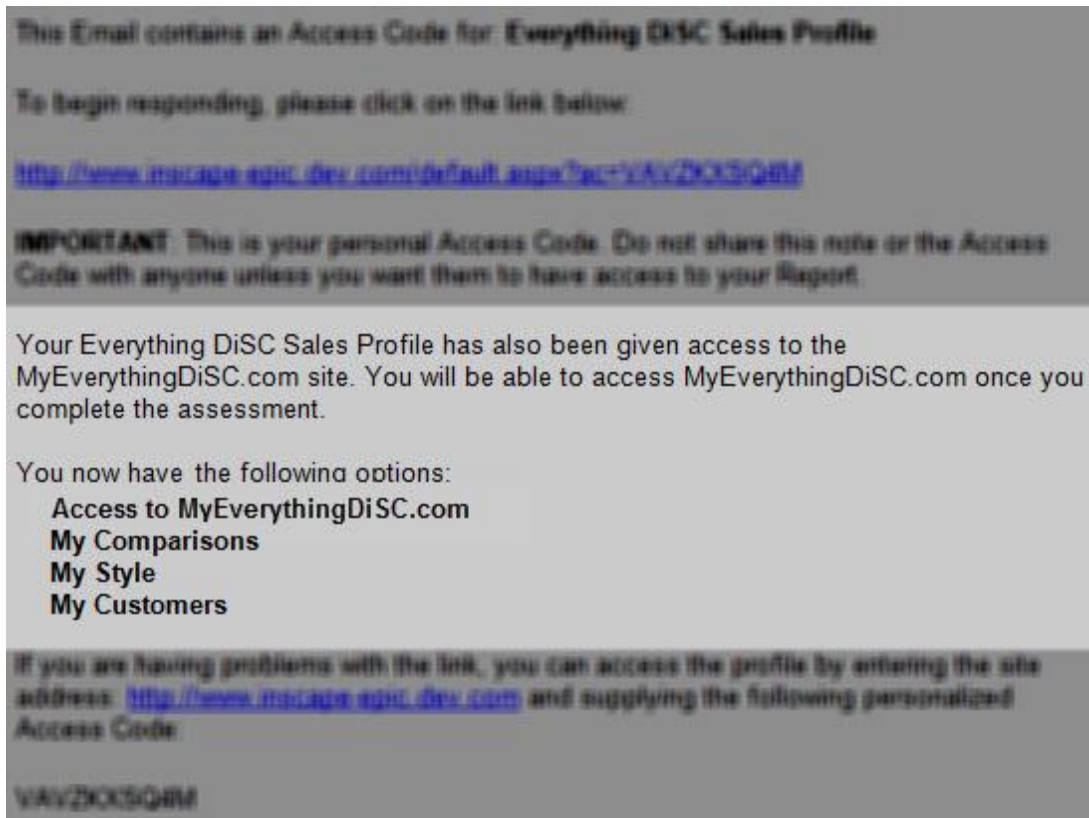
Report List

Updated Reports								
Email	Name	View Online	Access Enabled	My Comparisons	My Style	My Customers	Tailoring	Email Sent
epicsub2@inscapepublishing.com	Ben Hanna	Yes	Yes	Yes	Yes	No	No	No
epicsub3@inscapepublishing.com	Tiffany Bauchaus	Yes	Yes	Yes	Yes	No	No	No
epicsub4@inscapepublishing.com	Harold Potter	Yes	Yes	Yes	Yes	No	No	No
Unaffected Reports								
None								

Add or Remove Options for an Individual Report

1. Go to **Manage Reports** ▶ **Edit Existing Reports**.
2. Search for and select a profile to edit.
3. Once the report info is displayed on the page before you, press the **Change Report Options/Content** button in the **Advanced Options** section near the bottom of the page.
4. A pop-up message will appear; press the **OK** button.
5. Make changes in the MyEverythingDiSC Options section shown in the image below, then press the **Save** button at the bottom of the page to apply your changes.

EPIC sends an email to Respondents when you add MyEverythingDiSC options, and gives you the chance to add a custom message. A sample email is shown here:



MyEverythingDiSC Custom Messages

Use one of the custom email messages provided for you in EPIC. [See more...](#)

Run the Numbers for MyEverythingDiSC in EPIC

Run an EPIC activity report to find out who's using MyEverythingDiSC.

- [MyEverythingDiSC Status Report](#)
- [MyEverythingDiSC Usage Report](#)

How to Create A MyEverythingDiSC Account

To view additional MyEverythingDiSC help resources, [click here](#).

General Topics

Leap Forward Program

Anyone who has completed a DiSC Classic profile (1.0, 2.0, 2 Plus, or PPSS) in your EPIC account can take an *Everything DiSC Workplace* profile at a special reduced cost - 10 credits off!

! This discount **is automatically applied** when using the **Create a New Report/Issue Access Codes** function.


Everything DiSC Profile	Normal Price	Special Migration Price*
Everything DiSC Workplace	15 Credits	5 Credits

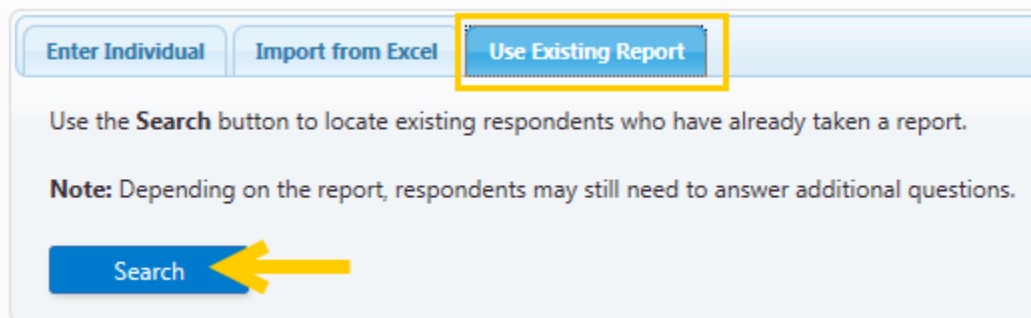
*These reflect the prices for English language products. Other language credit prices may differ based on the language. Any available language will offer a 10 credit discount through this program.

Create Discounted Reports

Use the **Create a New Report/Issue Access Codes** function to create a new report. While adding Respondents, instead of entering the person's name and email address, use the **Use Existing Report** function below. The EPIC credit discount will automatically be applied for eligible DiSC Classic to Everything DiSC migrations.

Use Existing Report

 **Saver** When available, select the **Use Existing Report** tab, then use the **Search** button to search for and select Respondents with completed profiles.












- When using one completed Everything DiSC Respondent to create a new Everything DiSC or Five Behaviors report, Respondents will

not be required to take the DiSC portion of the assessment again. Their previous DiSC style scores will be used in the new report, and only the report-specific questions will be asked.


- When using a completed DiSC Classic report to create an Everything DiSC report, the Respondent name and email address are carried forward, and the Respondent will be able to take the complete Everything DiSC assessment.

EPIC displays a message when one or more of your Respondents qualifies for the Leap Forward credit discount, and the credit deduction is automatically applied:

 *This image is an example only - credit charges vary by product.*

Email	Name	Qty/Cr	View
 epicsub1@inscapepublishing.com Edit	john lyons 	1 (5cr)	No <input type="checkbox"/>
 epicsub1@inscapepublishing.com Edit	Patrick McGivern 	1 (5cr)	Yes <input type="checkbox"/>
 epicsub1@inscapepublishing.com Edit	Sam Telcar 	1 (5cr)	No <input type="checkbox"/>
 epicsub1@inscapepublishing.com Edit	Matt McClure 	1 (5cr)	Yes <input type="checkbox"/>


Total Quantity: 4
Total Credits: 20



 One or more respondent(s) qualifies for credit discount.

Add Report Participants

Press the **Add** button, then use [Search](#) to locate and select people to add to the report. As Participants are selected, the list grows to display a complete list of selected Participants.

Participants

Add 

Email	Name	Product
 epicsub1@inscapepublishing.com	Andy Widen	Everything DiSC Management Profile (English)
 epicsub1@inscapepublishing.com	Bob Marcado	Everything DiSC Management Profile (English)

Keep using the **Add** button to add as many Participants as you wish; EPIC prevents you from selecting duplicates by letting you know when you've already selected someone.

Already Selected	Name: Bob	Product: Everything DISC Management Profile	Assigned: 8/28/2015
	Alternate Name: Bob Marcado	Language: English	Completed: 8/28/2015
	Email: epicsub1@inscapepublishing.com	Account: Your Company Name	Folder: ED Mgmt - New Respondent Site
	Access Code: 6BBDJZDSL	Last Generated:	Sub Folder:

See Also: [Create a New Report/Issue Access Codes](#)

Add Raters


Either use the **Enter Individual** tab to enter an email address, name and rater type for each of your raters, or use the **Import from Excel** tab to import a rater list. See [Download Import Templates](#) for additional information.

Add Raters 


Enter Individual
Import from Excel

After entering the Rater information, click the **Add Rater** button to add the name to the list. Click the **Next** button when you're finished adding Raters.

(Note: If you assign more than 10 Access Codes, they will be queued for delivery and sent out in intervals to avoid being marked as "spam" by the Respondent's email server.)


 What are the rules for adding Raters?

Email: Name: Rater Type: - None Selected - Add

Be aware of the number of each Rater type you plan to use to create the report. Although it does not affect the issuing of Access Codes, minimum requirements must be met in order for EPIC to generate an ED 363  report.

- The Leader must have completed their assessments in order for a report to be generated.
- A minimum number of Raters of any type who have completed their online assessments must be met before EPIC will generate a completed report. Minimums are:

- **Manager = 1**

 If a manager is included in the report, the report can be generated and viewed once the Leader and one (1) manager has completed the online assessment, regardless of the number or type of Raters who have not yet completed their assessments.

- **Peer** = 2
- **Direct Report** = 2
- **Other** = 2

You do not need to use all of the Rater types.

Example: *If you have three (3) Peers and (3) Direct Reports in a report, the report can be generated once the Leader and any two (2) of the same Rater type have completed the online assessment.*

- 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 type or use the Include function to temporarily remove any Rater responses from the report.

See Also: [Create a New Report/Issue Access Codes](#)

Add Respondents

Enter Individual Respondents

- Select the **Enter Individual** tab and 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, or Add Team Member).

- **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 reports cannot be set up to be viewed online by the Leader.

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

Add Raters: Although it does not affect the issuing of Access Codes, minimum requirements must be met in order for EPIC to generate a

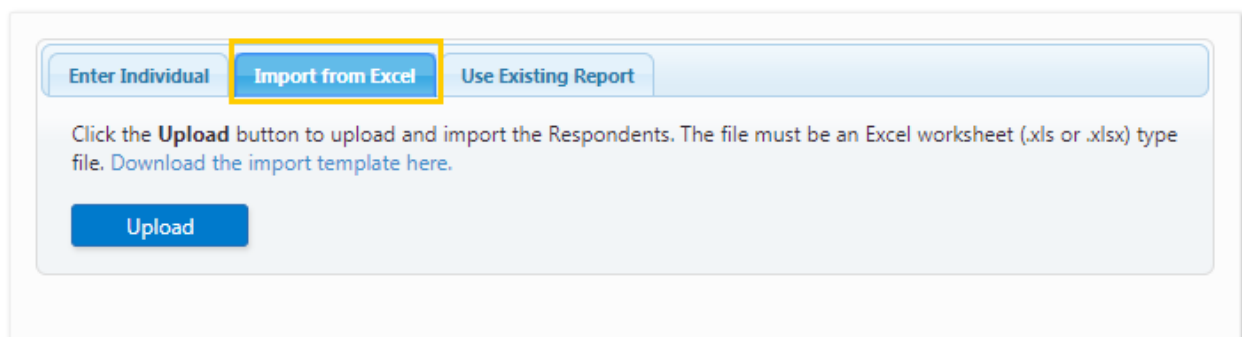
 report.

- A minimum number of Raters of any one type must be met before EPIC will generate a completed report. Minimums are:
 - Manager = 1
 - Peer = 2
 - Direct Report = 2
 - Other = 2
- **Note:** You do not need to use all of the Rater 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 Existing Reports](#) function to change the Rater type or use the Include function to temporarily remove any Rater responses from the report.

Import Respondents Saver

Select the **Import from Excel** tab and upload an Excel spreadsheet of Respondents.

See [Download Import Templates](#) for complete instructions.



The screenshot shows a web interface with three tabs: "Enter Individual", "Import from Excel", and "Use Existing Report". The "Import from Excel" tab is highlighted with a yellow border. Below the tabs, there is a text instruction: "Click the **Upload** button to upload and import the Respondents. The file must be an Excel worksheet (.xls or .xlsx) type file. Download the import template here." Below this text is a blue button labeled "Upload".


Use Existing Report

 Saver When available, select the **Use Existing Report** tab, then use the **Search** button to search for and select Respondents with completed profiles.

[Enter Individual](#)
[Import from Excel](#)
[Use Existing Report](#)


Use the **Search** button to locate existing respondents who have already taken a report.





Note: Depending on the report, respondents may still need to answer additional questions.

Search 


- When using one completed Everything DiSC Respondent to create a new Everything DiSC or Five Behaviors report, Respondents will not be required to take the DiSC portion of the assessment again. Their previous DiSC style scores will be used in the new report, and only the report-specific questions will be asked.
- When using a completed DiSC Classic report to create an Everything DiSC report, the Respondent name and email address are carried forward, and the Respondent will be able to take the complete Everything DiSC assessment.

EPIC displays a message when one or more of your Respondents qualifies for the Leap Forward credit discount, and the credit deduction is automatically applied:

 *This image is an example only - credit charges vary by product.*

Email	Name	Qty/Cr	View
✘ epicsub1@inscapepublishing.com Edit	john lyons 	1 (5cr)	No <input type="checkbox"/>
✘ epicsub1@inscapepublishing.com Edit	Patrick McGivern 	1 (5cr)	Yes <input type="checkbox"/>
✘ epicsub1@inscapepublishing.com Edit	Sam Telcar 	1 (5cr)	No <input type="checkbox"/>
✘ epicsub1@inscapepublishing.com Edit	Matt McClure 	1 (5cr)	Yes <input type="checkbox"/>

Total Quantity: 4
Total Credits: 20

 One or more respondent(s) qualifies for credit discount.

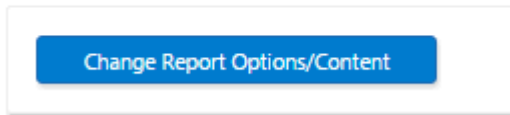
Advanced Report Options

Depending on the report type you are editing, the Advanced Options can vary. The topics below include help for both the **Use existing data for new report** button and the **Change Report Options/Content** button.

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.

Advanced Options ?

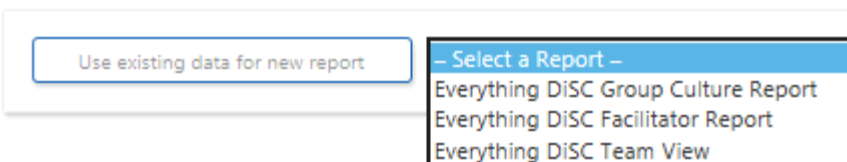


- When you make changes which do not automatically generate an email to Respondents, and you wish to notify Respondents of updated report options, use the [Resend Login Information](#) function to send an updated email to Respondents. The new link will allow Respondents to view any additional changes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

Use Existing Data for New Report button

While editing an existing group, team or facilitator report, you have the option to use all of the Participants to create a group report of a different type. In the **Advanced Options** section, first select a report from the drop-down list, then press the **Use existing data for new report** button and then follow the steps for [creating a group, team or facilitator report](#).

Advanced Options ?



See Also: [Edit Existing Reports](#) or [Batch Edit Report Options](#)

Advanced Account Options

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

Advanced Options

Session Timeout: minutes

- Allow viewing reports online by default
- Display Sub Account Search in *Manage Individual Sub Accounts*
- Enable Future Delivery and Auto Reminder feature for assigning Access Codes
 - Allow me to customize the subject line for the Auto Reminder email

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.

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 Username, 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.

Delivery and Auto Reminder Options

Time Zone Information:	 Important information regarding time zones
Deliver email:	<input checked="" type="radio"/> Immediately <input type="radio"/> On this date
Send reminder:	<input checked="" type="radio"/> Never <input type="radio"/> If not completed by



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.

Delivery and Auto Reminder Options

Time Zone Information:	 Important information regarding time zones
Deliver email:	<input checked="" type="radio"/> Immediately <input type="radio"/> On this date
Send reminder:	<input type="radio"/> Never <input checked="" type="radio"/> If not completed by <input type="text" value="11/10/2015"/>  <input type="text" value="12"/> <input type="text" value="45"/> <input type="text" value="PM"/> (GMT - 6)
Custom Reminder Subject:	<input checked="" type="checkbox"/> Use Custom Reminder Subject <input type="text" value="[RESPONDENT], please complete your [PRODUCT] x"/>
EPIC Email System Variable:	<input type="text" value="- Select a System Variable -"/> <input type="button" value="Insert"/>
To add an EPIC system variable to the Custom Reminder 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.	
Group ID:	<input type="text" value="Everything DiSC Workplace Profile (English) 10/27/2"/>

See Also: [View/Edit Account Information](#)

Create or Edit a Custom Message

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.

1. Give your custom email message a title.
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.

Edit an Existing Message

Press the **Edit** link for the message you wish to edit. Make your changes, then press the **Save** button to apply your changes.

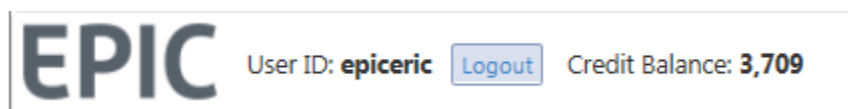
See Also: [Manage Custom Messages](#)

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 left portion of your EPIC administrator screen along with your Username.



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

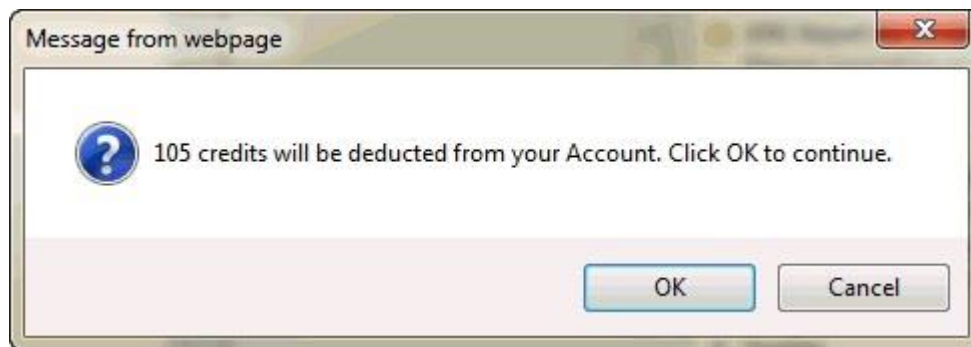
Credits can be:

- 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.
- Purchased by phone from Partner Care.

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 deduction. 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

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.

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(s) that the Credit balance has reached this threshold.

See Also: [Credits](#)

Data Privacy Policy

Wiley participates in and has certified its compliance with the EU-U.S. Privacy Shield Framework and the Swiss-U.S. Privacy Shield Framework and is recertified every year by TRUSTe.

Respondents for all 'non-US English' profiles and English profiles assigned by Accounts located outside of the United States 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's Data Privacy Policy

Data Privacy Policy

Inscape Publishing, LLC, a subsidiary of John Wiley & Sons, Inc (Wiley)

Last Updated May 24, 2018

This privacy policy applies to www.inscape-epic.com, <https://myeverythingdisc.com> or www.wiley-epic.com owned and operated by John Wiley & Sons, Inc (Wiley). All references to "Wiley" in this privacy policy are to Inscape Publishing, LLC. This privacy policy describes how Wiley collects and uses the personal information you provide on our web sites, www.inscape-epic.com or www.wiley-epic.com and our service platforms <https://admin.inscape-epic.com> and <https://myeverythingdisc.com>. It also describes the choices available to you regarding our use of your personal information and how you can access and update this information.

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If you have an unresolved privacy or data use concern that we have not addressed satisfactorily, please contact our U.S.-based third party dispute resolution provider (free of charge) at <https://feedback-form.truste.com/watchdog/request>.

Under certain conditions, more fully described on the Privacy Shield

website <https://www.privacyshield.gov/article?id=How-to-Submit-a-Complaint>, you may invoke binding arbitration when other dispute resolution procedures have been exhausted.

The use of information collected through our Service shall be limited to the purpose of providing the service for which our Client has engaged Wiley.

This Web site is designed to provide you with a personalized Report. By clicking Accept, you agree that Wiley 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, photo, and employment that will be used by Wiley for continued validation of this report but not linked to your profile. We also collect your email address to send you your results. This privacy policy 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 will share your personal data with third parties only in the ways that are described in this privacy policy.

In certain situations, Wiley may be required to disclose personal data in response to lawful requests by public authorities, including to meet national security or law enforcement requirements.

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.

If Wiley is involved in a merger, acquisition, or sale of all or a portion of its assets, you will be notified via email and/or a prominent notice will be displayed on our Web site of any change in uses of your personal data, as well as any choices you may have regarding your personal data.

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 Wiley'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 Wiley.

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 code 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 code 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 code 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 or to any third parties, and is not linked to your name or any other identifiable personal information. Wiley will not transfer your data to any third party or make the data available for use outside of its system.

We will retain your information as long as needed to provide you access to your completed profile. We will retain and use your information as necessary to comply with our legal obligations, resolve disputes, and enforce our agreements.

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 (such as login credentials) 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 websites, 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/Tracking Technologies

As is true of most websites, we gather certain information automatically. This information may include Internet protocol (IP) addresses, browser type, Internet service provider (ISP), referring/exit pages, the files viewed on our site (e.g., HTML pages, graphics, etc.), operating system, date/time stamp, and/or clickstream data to analyze trends in the aggregate and administer the site.

Wiley and its partners use cookies or similar technologies to analyze trends, administer the website, track users' movements around the website, and to gather demographic information about our user base as a whole. You can control the use of cookies at the individual browser level, but if you choose to disable cookies, it may limit your use of certain features or functions on our website or service.

Cookie Policy

Your Rights

You have the right to make a written request to be informed whether or not we hold or process any of your personal information (by emailing rights@everythingdisc.com). In your written request, you may:

- Request that we provide you with details of your personal information that we process, the purpose for which it is processed, the recipients of such information, the existence of any automated decision making involving your personal information, and what transfer safeguards we have in place;
- Request that we rectify any errors in your personal information;
- Request that we delete your personal information if our continued processing of such information is not justified;
- Request that we transfer your personal information to a third party;
- Object to automated decision-making and profiling based on legitimate interests or the performance of a task in the public interest (in which event the processing will cease except where there are compelling legitimate grounds, such as when the processing is necessary for the performance of a contract between us);
- Object to direct marketing from us; and
- Object to processing for purposes of scientific, historical research and statistics.

Changes in this Data Privacy Statement

If we decide to change our privacy policy, we will post those changes to this privacy policy, 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 policy 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 prior to the changes becoming effective.

Contact Us

Wiley
Data Protection Officer
privacy.epic@wiley.com
400 Highway 169 South
Suite 300
Minneapolis, MN
55426-1111

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.

Time Zone Information: Important information regarding time zones

Deliver email: **1** Immediately On this date 10/13/2015 06 45 PM (GMT - 6)

Send reminder: **2** Never If not completed by 10/27/2015 06 45 PM (GMT - 6)

Custom Reminder Subject: Use Custom Reminder Subject

EPIC Email System Variable:

To add an EPIC system variable to the Custom Reminder 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.

Group ID: **3**

Deliver email (image label 1): 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).

Send Reminder (image label 2): 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.

- Respondents with **pending** Access Codes receive the reminder.
- 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](#).
- 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.

Group ID (image label 3): 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.

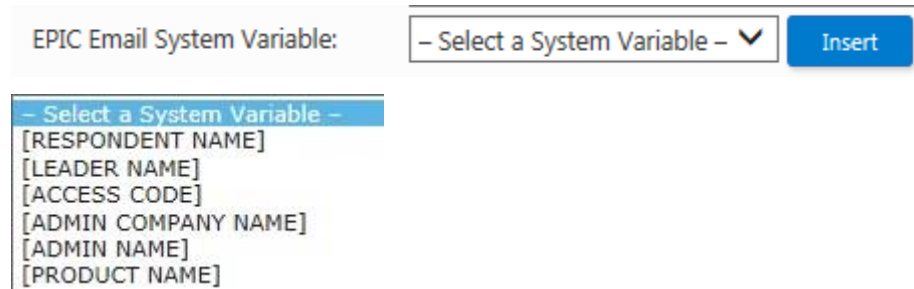
Edit Custom Message

System Variables

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].

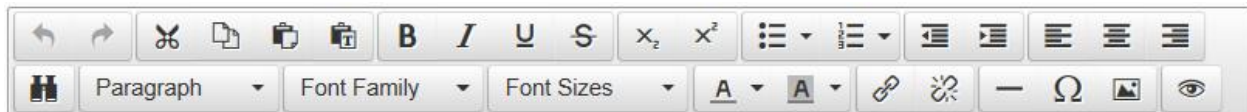
Before the email is sent, EPIC replaces the field placeholder with the actual Respondent Name, Leader Name, etc.

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.



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.



Getting Started Guide

Use the links below for help on setting up your new EPIC account and creating new reports.

Terms and Definitions

Before you get started, check out the meanings of some commonly used terms, such as "credit" and "access code". (Go to [Terms and Definitions](#))

Set Up Your Account & Add Your Brand

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

Enter your contact information, company information and logo to add your brand to EPIC assessments and profiles. You can also use this function to set your default account settings in EPIC; these settings can be used to save you time and activate administrative features for your account.

(Go to the [View/Edit Account Information help topic](#))

Create New Reports & Email Online Assessments to Your Participants

Choose **Manage Reports** ▶ **Create a New Report/Issue Access Codes** from the EPIC menu.

Select one of your available products, and then add the names and email addresses of your participants (EPIC Respondents). EPIC creates a unique Access Code for each Respondent's report. The Respondents receive an email containing a link to an online assessment, and their responses are used to create their completed report.

(Go to the [Create a New Report/Issue Access Codes help topic](#))

Resend the Assessment Email to Your Participants

Choose **Manage Reports** ▶ **Resend Login Information** from the EPIC menu.

Search for the pending assessments using the Search function, select the report Access Codes you wish to have resent (via email) to your participants, and optionally, create a custom email message to include.

(Go to the [Resend Login Information help topic](#))

Edit Existing Reports

Choose **Manage Reports** ▶ **Edit Existing Reports** from the EPIC menu.

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.

(Go to the [Edit Existing Reports help topic](#))

(Go to the [Edit Existing Five Behaviors Team help topic](#))

Print a Set of Completed Reports to Take to Training

Choose **Manage Reports** ▶ **Batch Functions** ▶ **Generate Reports for Download** from the EPIC menu.

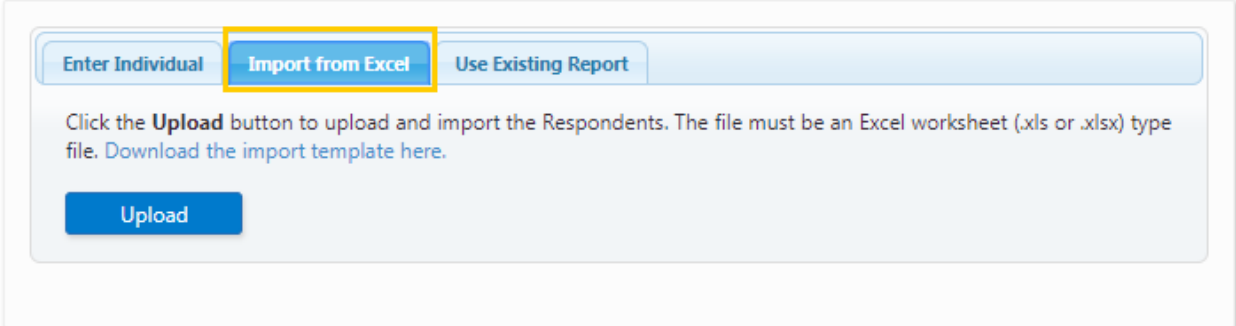
Search for the group of reports you wish to print, and EPIC generates the reports all at one time. (EPIC "generates" a report by pulling in the online assessment responses for the participant.) EPIC will create a zip file containing the entire set of generated reports for you. You can quickly save these PDF formatted files to your computer to print all at one time.

(Go to the [Batch Generate Reports for Download](#) help topic)

Import Respondents Saver


Select the **Import from Excel** tab and upload an Excel spreadsheet of Respondents.

See [Download Import Templates](#) for complete instructions.




The screenshot shows a web interface with three tabs: "Enter Individual", "Import from Excel", and "Use Existing Report". The "Import from Excel" tab is selected and highlighted with a yellow border. Below the tabs, there is a text instruction: "Click the **Upload** button to upload and import the Respondents. The file must be an Excel worksheet (.xls or .xlsx) type file. Download the import template here." Below this text is a blue "Upload" button.

ED 363 Leader Name and Gender

 ED 363 Leader names cannot be edited once Access Codes have been created. Unassign pending Access Codes and re-create the report to correct the leader name. (This will be the leader name as seen by the raters, but will not be the name on the completed report.)

Note that 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.

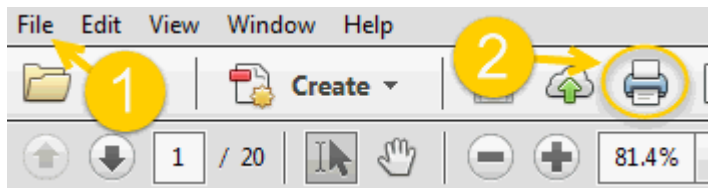
For pending  ED 363 Access Codes, the gender entered determines how the assessment reads to the Raters ("He/She" etc.). Any edit made to the gender field for the Leader will be seen immediately by Respondents taking the assessment.

Printing in Greyscale/Black and White

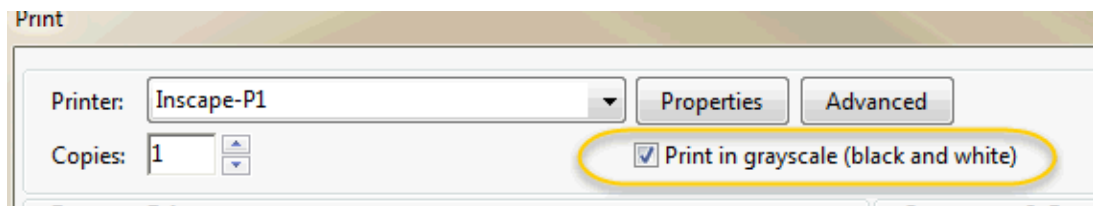
Using your printer settings, you can print a color report in greyscale/black and white.

Generate the color report. (See [View/Print/Email Completed Reports](#))

Use the **View** option to open the document as a PDF. Locate the File menu and choose **Print**, or (2) press the printer icon:



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:



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.

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.

 **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:

Team Name

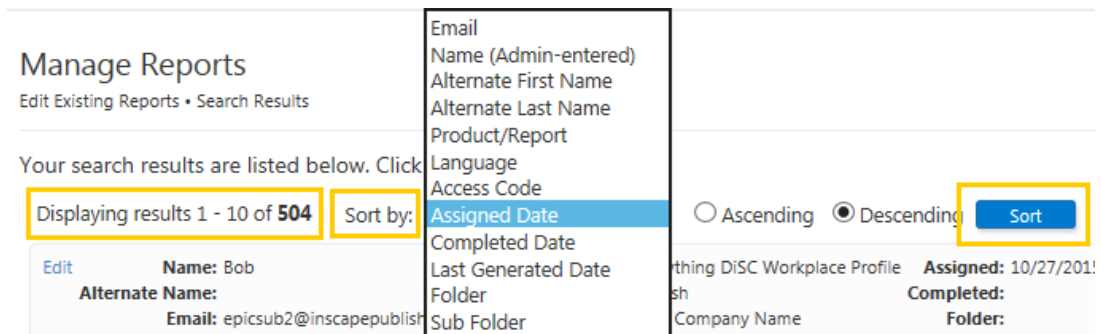
 A team name is required for Five Behaviors reports, and appears on the cover of each report. Use a unique name for each team to easily differentiate between teams when searching for similar reports.

Team Name:

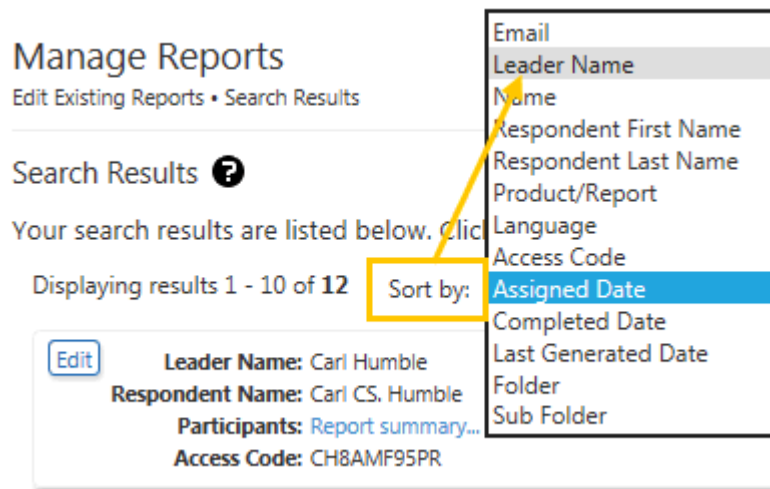
Search Results

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.




- **Leader Name** will be available as a sort criterion if an *Everything DiSC 363® for Leaders* report is in the search results. When **Leader Name** is selected to **Sort by**, all of the *Everything DiSC 363® for Leaders* reports will be listed first.






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 an ED 363 for Leaders profile or a Five Behaviors Team.

Multi-Respondent Reports

-  ED 363 reports are considered complete in EPIC when the Leader and one (1) Rater have completed the assessment, and are able to be generated (and viewed) when the Leader and two (2) Raters in any category have completed the assessment. In cases where there is a Manager type of Rater assigned, the

report can be generated when the Leader and one (1) Manager have completed the assessment. A **Report Status** link will indicate those in your search results which cannot yet be generated.



-  When you create a Five Behaviors team, EPIC creates an Access Code for each individual team member. EPIC also creates an Annotated Team Report for use by the facilitator. This Annotated Team Report has its own Access Code, and is displayed in the same search results with the individual reports. This Annotated Team Report includes the same team information displayed in the reports of the individuals, but also includes valuable facilitation information in the margins of the report.
 - 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.

Search

On this page:

- [Search Tips](#)
- [Search Criteria](#)
- [Search Results](#)
- [Multi-Respondent Reports](#)
- [Selecting Search Results](#)

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 an  ED 363 for Leaders report by Leader name (Raters are not returned separately).
- Search results for  Five Behaviors Products may include the Annotated Team Report and Annotated Progress Report along with the associated individual team member reports, depending on which EPIC function you are using.
- 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, and group report name. Rater 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.

See Also: [Folder Maintenance](#)

Search Results

Sort

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Manage Reports
Edit Existing Reports • Search Results

Your search results are listed below. Click

Displaying results 1 - 10 of 504 Sort by:

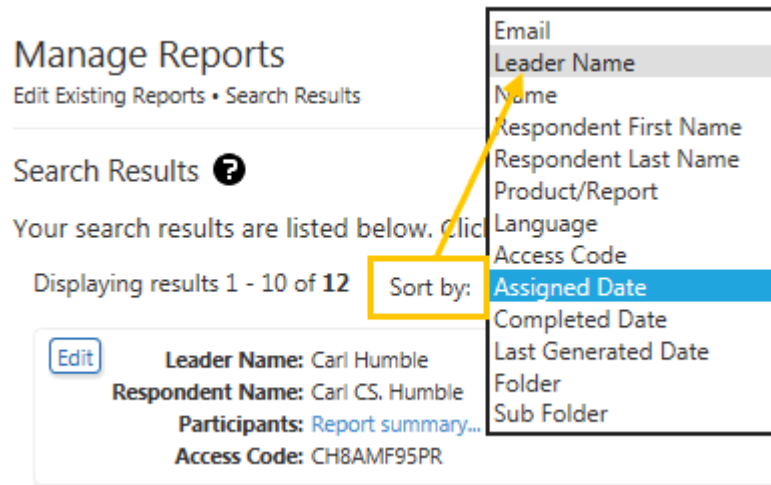
- Email
- Name (Admin-entered)
- Alternate First Name
- Alternate Last Name
- Product/Report
- Language
- Access Code
- Assigned Date
- Completed Date
- Last Generated Date
- Folder
- Sub Folder

Ascending Descending

Edit Name: Bob
Alternate Name:
Email: epicsub2@inscapepublish

Everything DiSC Workplace Profile Assigned: 10/27/2011
sh Completed:
Company Name Folder:



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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.

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

Select a Product Family, Product, and Language, then click the **Next** button to continue.

Product Family:	<input type="text" value="- None Selected -"/>	▼
Product:	<input type="text" value="- None Selected -"/>	▼
Language:	<input type="text" value="- None Selected -"/>	▼

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

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 Code(s) returned as undeliverable, you will need to correct the email address using [Edit Existing Reports](#) feature. During the process in EPIC where you enter the correct email address, a new Access Codes email is be sent to the Respondent using the new email address.