Assign Profile Access Codes

Log into your EPIC account at http://admin.inscape-epic.com. If you do not have an EPIC account, contact your Inscape Publishing Authorized Distributor for assistance.

Hint:
Before assigning codes to a large number of people, it is recommended that you set up an **import spreadsheet** in Excel containing the names, email addresses, and the View Report status of your respondents.

Click on Help in the EPIC navigation menu and select **Creating and Managing Reports** for instructions on how to **Import Names**.

Hint:
When customizing emails, create and save custom messages to your **Custom Message Library** before assigning access codes. They will then be available to you to insert and edit when using custom email messages.

Click on **Help** in the EPIC navigation menu and select **Maintaining Your Personal Options** for instructions.

Mouse over **Manage Reports** in the navigation toolbar, and select **Create a New Report/Issue Access Codes**.
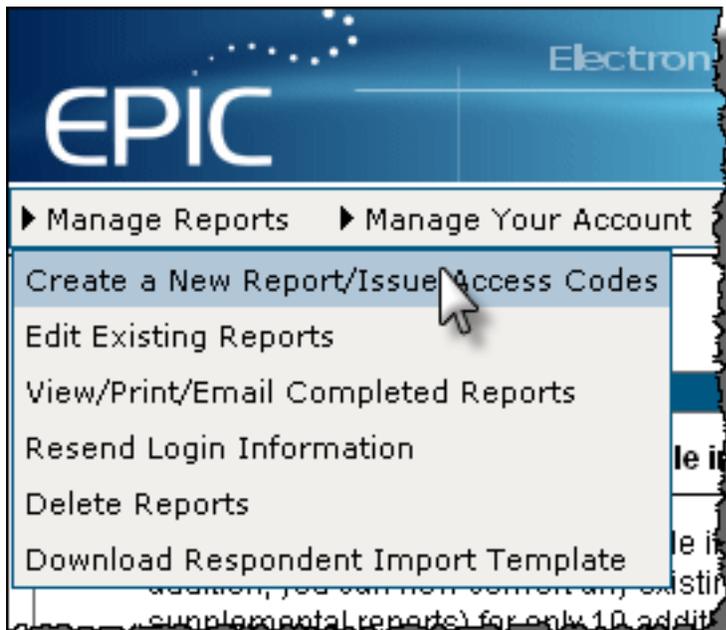
In the **Product Family** field, select Everything DiSC. In the **Product** field, select the report you want to assign. Then click **Next**.

The **Report Options** section appears. You can choose to assign all report sections (the default setting), or only certain sections. You also have the options to enable a follow-up activity and tailor the report below the Report Options field. Make your selections, then click **Next**.

The **Report Details** section will list the product, language, and options you have chosen.

- If you want the respondents' information to be located in an existing folder, click on the drop-down arrow in the **Folder** field and select the name of the folder.
- If you want to create a new folder, click on **New Folder** at the end of the **Folder** field and follow the prompts.
- If you want the respondents' information to be located in a subfolder, click on the drop-down arrow in the **Sub Folder** field and select the name of the subfolder, or click on **New Sub Folder** at the end of the field and follow the prompts to create a new subfolder.

If you set up an import spreadsheet (as recommended in the first Hint above), click on the **Import Respondents** button at the bottom-left corner of the **Add Respondents** section to upload your spreadsheet. Click on [?] to the right of the Import Respondents link for instructions on how to import names.

Add Respondents   ?

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: Quantity: View Report: Name:

    ● Yes   ○ No

Add Respondent

⊞ **Import Respondents**   [?]

If you have not set up an import spreadsheet, enter the necessary information into the following fields:

- **Email Address** of the first respondent.
- **Quantity**
- **View Report:** Determine whether you want the respondent to view the profile immediately upon completing the assessment. (See View Report Recommendation)
- **Name** of the respondent

Click on the **Add Respondent** button to add the information. The information fields will be cleared and the respondent's information will appear below. You may now enter another respondent's information in the fields.

Email Address: Quantity: View Report: Name:

    ● Yes   ○ No

Add Respondent

⊞ **Import Respondents**   [?]

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

|	Email Address	Quantity	View Report	Name	Credits
✖	respondent@location.com	1	No	Respondent Name	15
		Total Quantity: **1**			Total Credits: **15**

Click the **X** to the left of the respondent's information to delete the entry if you entered it in error or need to correct the information.

Hint:
To speed the data-entry process, use the **Tab** key to move from field to field when entering names, then press the **Enter** key to add the name to the list.

When all respondents have been added, click on the **Assign Access Code(s)** button at the bottom-left corner of the section. A confirmation window will be displayed indicating the number of credits that will be deducted from your EPIC account.

Click **OK** to continue.
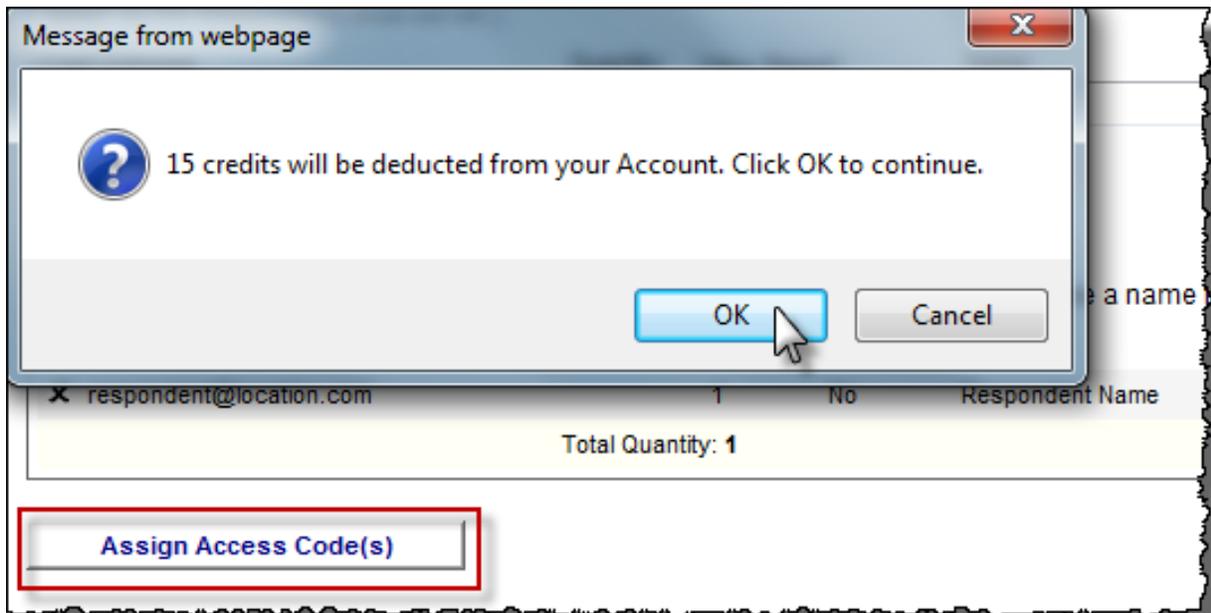
A dialogue window will appear, giving you the option to add a custom message or change the subject line of the default email that will deliver access links to the respondents. Click **OK** to include a custom message that will appear above the EPIC default message. Click **Cancel** if you want to send the EPIC default message and subject line.
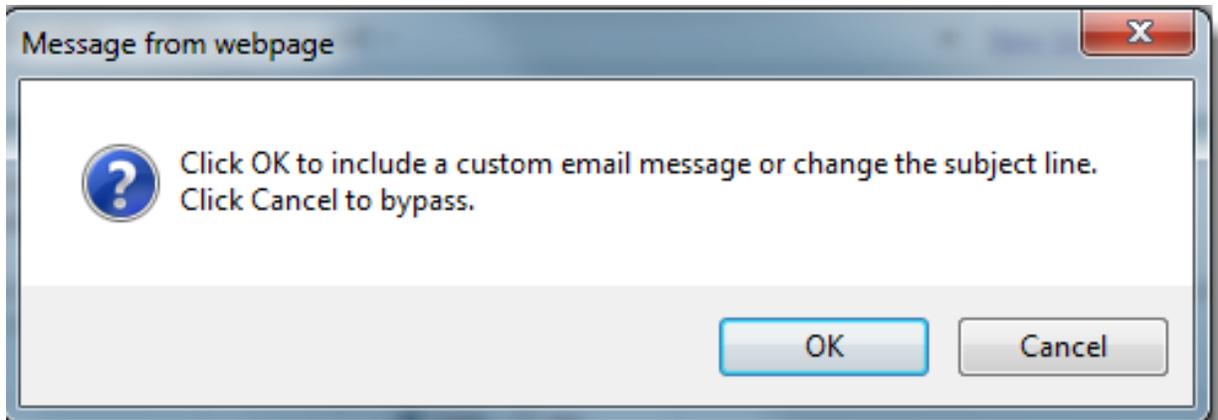
The confirmation screen appears after you have successfully assigned your access codes. To view details of your respondents, click on the blue **Details** link in the **Respondents** section.
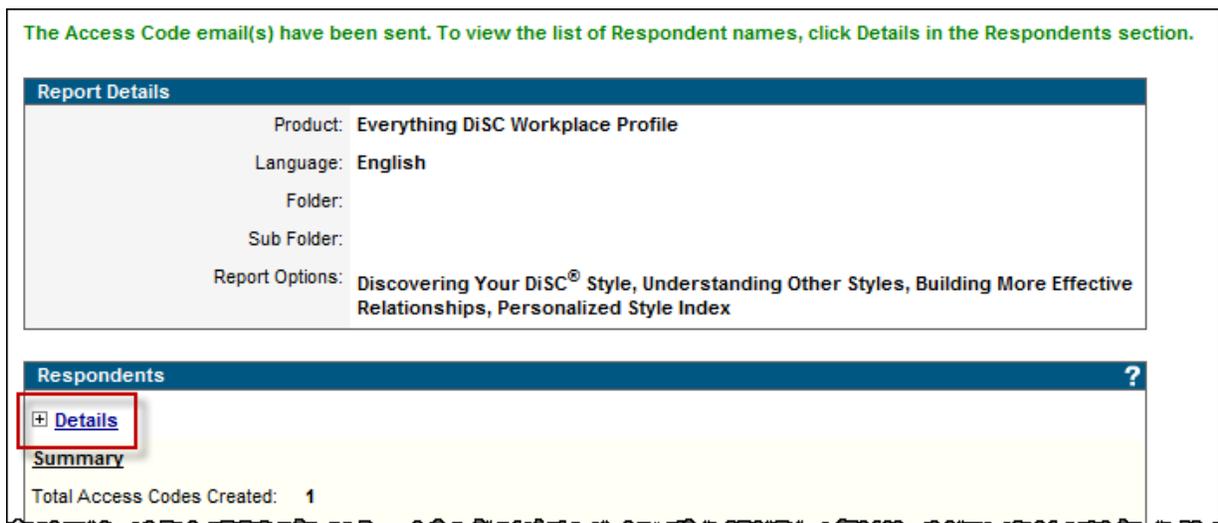
To continue working in EPIC, use the EPIC navigation menu at the top of the page to select your next step.