

EPIC

EPIC Multi-User Functionality

Primary and Sub Accounts can now create any number of EPIC users, each with their own username and password.

If you have multiple people who work in your EPIC account, each person can create a unique username and password. Newly created users must accept the Terms of Use the first time they log in.

Creating multiple users is optional. This new functionality does not change how you currently use EPIC.

Creating a New User

EPIC Administrator Roles and Permissions

EPIC users can be assigned one of two roles —either a Super Administrator (**Super Admin**) or an Administrator (**Admin**).

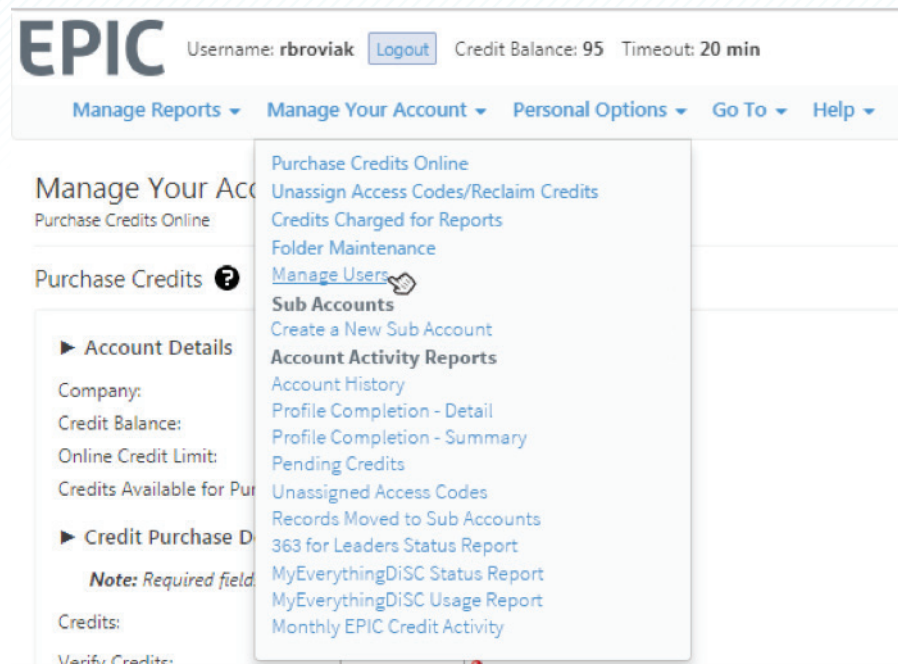
- Each account must have at least one **Super Admin**. By default, your original EPIC username has Super Admin capabilities.
- An account can have multiple **Admins**, or none at all.

A **Super Admin** can do everything in EPIC, including the new ability to add, delete, and edit user information for other Super Admins and Admins. Only Super Admins can change the company's information under *[Personal Options • View/Edit Account Information](#)*.

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

To create a new user in your EPIC account, go to *[Manage Your Account • Manage Users](#)*. A new menu item called *[Manage Users](#)* is now available to Super Admins from the *[Manage Your Account](#)* menu. Click on *[Manage Users](#)* to add a new user.

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Enter the user's name, choose a unique username for the individual, enter the user's email address, select the user level (Super Admin or Admin) and determine whether the user should receive email notifications when profiles are completed.

The screenshot shows the 'Manage Your Account' page with the 'Manage Users' section active. The 'Add Users' form is displayed, featuring input fields for 'Name', 'Username', and 'Email', and a dropdown for 'User Level'. The 'User Level' is currently set to 'Super Admin'. A checkbox labeled 'Send notification email when a respondent completes a profile' is checked. An 'Add User' button is at the bottom of the form. Below the form, the 'View All Users' section displays a table of existing users:

Name	Username	Email	User Level
Alice Bixby	abixby1	abixby@email.com	Super Administrator

A checkbox labeled 'Send notification email when a respondent completes a profile' is also present below the table.

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The email address entered for a new user will be used for password creation and password reset email notifications. It will also be automatically added to the Notifications Email Addresses list. (See the [System Notifications](#) section under **Personal Options • View/Edit Account Information**.)

The screenshot shows the 'System Notifications' section. It features a table titled 'Notifications Email Addresses:' with columns for 'Email' and 'Primary'. The first row shows 'abixby@email.com' as the primary address. The second row shows 'aeleffson@email.com' with a checkmark in the 'Primary' column and a 'Set' button. Below the table is an input field and an 'Add' button. To the right, there is a red dot icon and the text 'Your Email Addresses' and 'Multiple Email Addresses'. At the bottom, there is a checkbox labeled 'Send notification email when a respondent completes a profile' which is checked.

- 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 a user does not want to receive these additional email notifications, a Super Admin must remove the email address from the [Notification Email Addresses](#) list.

Users can also be edited through the [Manage Users](#) page as pictured below. Clicking Edit will open the text box. The user level can be edited through the dropdown menu.

The screenshot shows the 'View All Users' section. It displays a table with user information. The first row shows 'Andrew Eleffson' as the name, 'aeleffson@email.com' as the email, and 'andyeleffson' as the username. The 'User Level' is set to 'Super Administrator'. There is an 'Edit' button next to the name and email. A checkbox labeled 'Send notification email when a respondent completes a profile' is checked. A dropdown menu is open next to the 'User Level', showing options: 'Super Administrator', 'Super Administrator', and 'Administrator'.

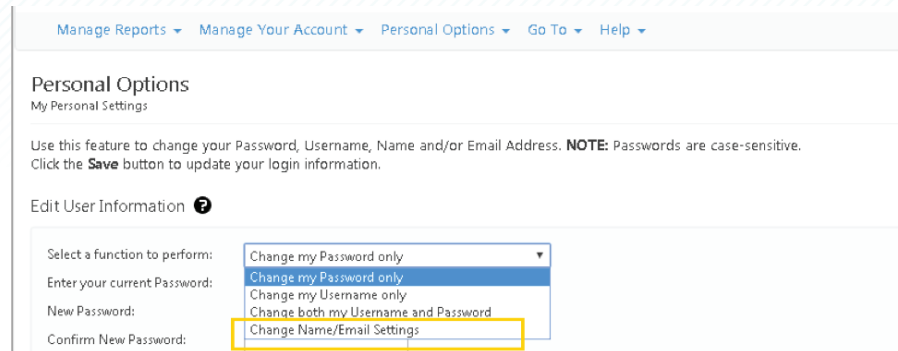
When a Super Admin changes the name, email address, and/or user level of another user, a notification email will be sent to the user whose information was changed.

Personal Options • My Personal Settings

The **Personal Options • Change Username/Password** menu option has been changed to **Personal Options • My Personal Settings**.

An additional option called [Change Name/Email Settings](#) has been added to the dropdown menu. This option allows each user to change their Name and/or Email Address.

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Manage Reports ▾ Manage Your Account ▾ Personal Options ▾ Go To ▾ Help ▾

Personal Options

My Personal Settings

Use this feature to change your Password, Username, Name and/or Email Address. **NOTE:** Passwords are case-sensitive. Click the **Save** button to update your login information.

Edit User Information ?

Select a function to perform: Change my Password only ▾

Enter your current Password: Change my Password only

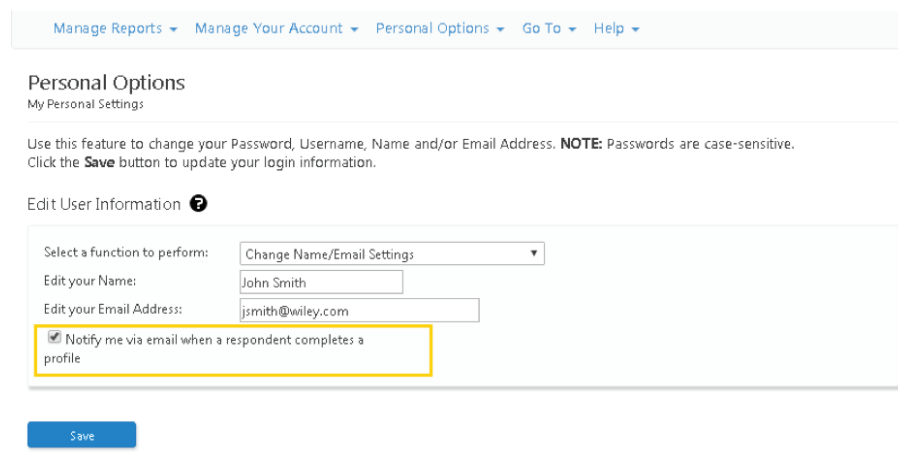
New Password: Change my Username only

Confirm New Password: Change both my Username and Password

Change Name/Email Settings

Note: A notification email will be sent to the Super Admin(s) any time a user changes their Name and/or Email Address.

Each user can choose to receive Profile Completion notifications.



Manage Reports ▾ Manage Your Account ▾ Personal Options ▾ Go To ▾ Help ▾

Personal Options

My Personal Settings

Use this feature to change your Password, Username, Name and/or Email Address. **NOTE:** Passwords are case-sensitive. Click the **Save** button to update your login information.

Edit User Information ?

Select a function to perform: Change Name/Email Settings ▾

Edit your Name: John Smith

Edit your Email Address: jsmith@wiley.com

☒ Notify me via email when a respondent completes a profile

Save

Personal Options • View/Edit Account Information

Super Admins can edit account information. Admins are only able to view the account's information.

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Company Information

The new [Company Information](#) Section now contains the Account ID. This is a system generated, unique account identifier that cannot be changed. If an account has Sub Accounts, users can see those Account IDs as well. (See [Manage Individual Sub Accounts](#) for more information regarding this.)

The screenshot shows the 'Personal Options' page with a navigation bar at the top containing 'Manage Reports', 'Manage Your Account', 'Personal Options', 'Go To', and 'Help'. The main heading is 'Personal Options' with a sub-link 'View/Edit Account Information'. A note states: 'Note: Required fields are indicated with *'. The 'Company Information' section includes the following fields:

- Account ID:** 13689
- Company Name:** A text input field containing 'Your Company'. A red asterisk and note indicate: 'The name of your company'.
- Administrator Name:** A text input field containing 'John Smith'. A red asterisk and note indicate: 'This is the primary contact and is displayed in the default email subject line when assigning Access Codes'.
- Company Logo:** A section with a logo placeholder showing a stylized 'X' and the text 'COMPANY NAME'. To the right, it specifies: 'Required File Type: JPEG, PNG or GIF', 'Recommended Size: 750 X 750 pixels', and 'Recommended Resolution: 300 dpi'. Below the logo are 'Delete Logo' and 'Upload Logo' buttons. A note states: 'Your Company Logo will be displayed on the front cover of your profiles'.
- Company Website:** A text input field with a placeholder '(Example: www.wiley.com)'.

Your company logo and company website can also be uploaded and entered in the [Company Information](#) section.

Each account has a primary contact, designated as the **Administrator Name** in the [Company Information](#) section. This name is displayed in the default email subject line when assigning access codes.

The screenshot shows the 'Assign Access Code Subject' section with two radio button options:

- Default Subject:** Selected. The subject line is '[ADMIN NAME] has registered you for: [PRODUCT NAME]'. A yellow arrow points to this option.
- Custom Subject:** Unselected. The subject line is 'To [RESPONDENT NAME] - [ADMIN NAME] has regi'.

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System Notifications

The [System Notifications](#) section allows you to determine who will receive system notification emails, such as low credit reminders, Sub Account creation notices, etc. Each email address in the Notification Email Addresses list will receive these.

System Notifications

Notifications Email Addresses:

Email	Primary
jsmith@comp-z.com	<input checked="" type="checkbox"/>
✗ cterres@comp-z.com	<input type="checkbox"/>

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 (when done either by the user through [My Personal Settings](#) or by a Super Admin through the [Manage Users](#) screen) replaces that email address in the [Notification Email Addresses](#) list.

Note: An email address cannot be used for more than one user in the same account.

Email Options

The Email Options section has been changed to accommodate multiple users.

Email Options ?

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

Outgoing Email Username: Appears before the @ in the system email address. Must be unique.

Email Display: **Your HR Team <company-z@inscape-epic.com>**

Assign Access Code Subject: ☒ Default Subject
[ADMIN NAME] has registered you for: [PRODUCT NAME]
☐ Custom Subject

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

Email Format: ☒ HTML ☐ Plain Text

Each EPIC account shares an [Outgoing "From" Name](#) and one shared [Outgoing Email Username](#).

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Users can designate a new *Outgoing “From” Name* and a new *Outgoing Email Username* of their choice. This essentially creates the account’s outgoing email address. This is the email address that people see when they receive an email sent from your EPIC account.

The *Outgoing “From” Name* is the “friendly” name that appears before the bracketed email address. This does not need to be unique.

The *Outgoing Email Username*, which is displayed before “@inscape-epic.com” in the example below, can be changed, but it does need to be unique. It is recommended that you select something that represents your account or company for the *Outgoing Email Username*.

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>	

Manage Individual Sub Accounts (if your account has Sub Accounts)
Manage Your Account • Sub Accounts • Manage Individual Sub Accounts has also been updated to accommodate multiple administrative users in a single account.

You can now search for Sub Accounts by **Account ID**.

Manage Reports ▾ Manage Your Account ▾ Personal Options ▾ Go To ▾ Help ▾

Manage Your Account
Sub Accounts • Manage Individual Sub Accounts

Search Criteria ☐ Include Closed Accounts

Enter search criteria and click **Search** to locate a specific Sub Account, or click **Show All** to retrieve all Sub Accounts.

Username:	<input type="text"/>
Administrator Name:	<input type="text"/>
Email Address:	<input type="text"/>
Company Name:	<input type="text"/>
Account ID:	<input type="text"/>

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If you don't see the option to search for Sub Accounts, enable the *Display Sub Account Search in Manage Individual Accounts* option in the *Advanced Options* under **Personal Options • View/Edit Account Information**.

Advanced Options ?

Session Timeout: 90 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

You also have the ability to see if a Sub Account has access to **MyEverythingDiSC®** and whether the Sub Account has been enabled to create Extract Files.

Finally, each user's name and email address is displayed. Super Admins are designated with an *.

[-] **New Sub-Sub Account** (Janet Simms)

Account ID: 31162	Credit Balance: 285
Account Status: Active	Credit Limit: N/A
User's Name (Super*) / Email Address:	Report Cover Footer: Yes
Janet Simms* rwalbon@inscapepublishing.com	MyEverythingDiSC Access: No
JJ Kramer* jrawlins@comp-z.com	Extract Files: Yes

[Add/Remove Products](#) | [Transfer Credits](#) | [Credit Limit](#) | [Profile Completion Report](#) | [Credit Transactions Report](#) | [Close Account](#)

[-] **Home For Good** (Karen Petersen)