Enhancing the EPIC Edge

For Additional Information Or To Order Contact Us at 847-259-0005.
Email EPIC@internalchange.com Or order online at http://www.epiccredits.com .

EPIC 3 Release Highlights

1) The *Login* screen has been redesigned.
   a) The system no longer locks up after 3 failed login attempts.
   b) Retrieve login info two different ways– either by *UserID* or *email address* of the administrator for the account.
   c) Login information will be displayed in the language selected in the *Personal Options* section.
2) The system has a new, crisper look with a redesigned home page.
   a) All key account information is now located in one spot
      i) User ID
      ii) Count down timer on your session
      iii) Credit Balance
3) The *Menu* structure remains the same with the exception of two new menu options under *Manage Reports*.
      i) *Delete Records*
      ii) *Download Respondent Import Template*
4) In all locations where a product list is displayed, it is now broken into *Product Family* and *Product* to reduce the size of the list and eliminate screen scrolling.
5) The following changes apply to *View/Edit Personal Options*:
   a) *Upload Logo* is now integrated into the *View/Edit Personal Options* page, eliminating a multi-step process.
   b) The admin site is now capable of multi-lingual display. Once translation work is completed, you will be able to view the site in a variety of languages.
   c) Ability to set the *Default Language* that will display when *Assigning Access Codes*.
   d) Insert variable fields in the *Custom email Subject Line*.
   e) Set a Global default for *Viewing Reports.*

   f) Select your system timeout option from a range between 20 minutes and 2 hours with a new *Session Timer*. The time display changes to red when you have 5 minutes remaining in your session. Once you time out, a message is displayed informing you that you've timed out and you'll need to sign into the system again.

6) The *Assign Access Code* email now has a plain text and an HTML version. The HTML version uses shading, bolding, etc. to highlight the key information in the email. The text version remains the same.
7) A rich text or HTML editor has been added for creating *Custom Email Messages*.
   a) If the HTML email format is selected on the *View/Edit Account Information* page, the editor is shown and you have a number of formatting features available for the *Custom Email Messages* sent from EPIC.
      i) Bolding
      ii) Indenting
      iii) Font size and color changes
      iv) Embedded links
      v) Images
   b) HTML code can no longer be entered in the text area or imported into the system from an HTML editor (e.g., FrontPage). All existing HTML code will be converted but can only be edited with the rich text editor.
8) The following changes have been made to the basic functions of the *Assign Access Code* process.
   a) The Default Language selected in *View/Edit Account Information* is automatically inserted when assigning a profile.
   b) *Add Respondent* has been modified to reduce timeout issues that occurred for people entering complicated email addresses. Each name is entered individually then added to a list. Each time the *Add Respondent* button is clicked, the timer resets. (Use the enter key as a shortcut method to add names to the list instead of clicking the *Add Respondent* button.)
   c) There is no limit on the number of Access Codes that can be entered on the screen. Enter a name and then click on the *Add Respondent* button to keep adding names to the list.
   d) If the number of email addresses is greater than 25, they will be put in a queue and sent out in 10 minute intervals to help prevent spam issues at the receiving site.
   e) Once a name is added to the list, it can be removed from the list by clicking the "X" in front of the name.
   f) Invalid email addresses are checked when each name is added to the list instead of processing the entire list at one time.
   g) The confirmation screen provides a snapshot of your credit balance before and after the *Assign Access Code* process along with a list of the names and a status of the Assign Access Code email.
9) A new *Import Names* function has been added to the *Assign Access Code* process.

a) A ‘Bulk load’ of names can now be done by the end user using an Excel spreadsheet and the new *Assign Access Code Import* function.
b) The template for the bulk load is located under *Manage Reports >> Download Respondent Import Template*.
c) Once the respondent names are loaded on the spreadsheet, the normal *Assign Access Code* process is followed until you get to the *Add Respondent* portion. Instead of adding respondents one at a time, click on *Import Respondents* to locate your spreadsheet. The list of names will be uploaded to the system.
d) If you try to upload more names then your credit balance will allow, the upload process will stop and no names will be imported.
e) Invalid email addresses will be flagged during the *Import Respondents* process
f) You can use the *Import Respondents* process and still add individual names to the list using the standard *Add Respondent* process.

10) The *Resend Login Info* screen has been redesigned.
    a) *Pending* and *Completed* codes can no longer be combined in the same *Resend* process. This helps the user know what subject line is used on the email message.
    b) The confirmation screen has been simplified so removing a name from the list is no longer a two step process. Simply remove the check mark from the name if you don’t want to resend and then click the *Resend Login Information* button.
    c) You can view the subject line that is used during the *Resend Login Information* process and select either the system standard subject line or a custom subject line.
11) The *Unassign Access Code* screen has been redesigned.
    a) The confirmation screen has been simplified so removing a name from the list is no longer a two step process. You simply remove the check mark from the name if you don’t want to unassign and then click the *Unassign Access Code* button.
    b) You can view the subject line that is used during the unassign process and select either the system standard subject line or a custom subject line.
12) Reports can now be removed from the system using the *Delete Reports* function.
    a) All information on an individual report including name, email, gender, responses, scoring is deleted.
    b) Deleting an individual record also deletes it from a Group Report.
        i) If the individual record is part of a Group Report that has edits remaining, additional individuals can be added.
        ii) If the individual record is part of a Group Report that does not have edits remaining and the minimum number of respondents is no longer met (3 participants for group reports), the report can no longer be run.
    c) Once a report is deleted, it will no longer be shown on the *Account Activity Detail Report*. For accounting purposes, a count of the deleted reports and the credits associated with those reports will be shown on the *Account Activity Summary Report* in a separate section at the bottom of the page.

d) Pending records can also be deleted. Deleting a Pending record returns credits to the account.
e) An option to send an email to the individual when the record is deleted is also available.
f) Deleted records cannot be retrieved.
g) Deleting a Group Report does not delete the individual records.

13) The *Add/Remove Products for Multiple Sub Accounts* has been improved.
    a) The display of account names and the functionality of the *Add/Remove* option have been modified so you can easily see your account list and all of the products.
14) All *Activity Reports* generated by the system are now created as PDF documents so they can be easily printed, downloaded or emailed.
15) *Profile Completion* email messages sent to the EPIC account administrator now contain the folder and sub folder for the access code.
16) The *Search* feature has been modified:
    a) Records can be located by access code
    b) You can search across all your sub accounts (if the Sub Account view is active) and locate a record by name or email address
    c) In all locations where the search criteria page is displayed, you can select the number of records to display on the search results screen. The range is from 10 (default value) to a max of 100
17) To help streamline the process when building Group or Comparison reports, the extra confirmation screen that used to appear after selecting all of the participants has been removed.

For Additional Information Or To Order Contact Us at 847-259-0005.
Email EPIC@internalchange.com Or order online at http://www.epiccredits.com .