

Managing Your Account Settings

To Begin

1. Under the Personal Options Menu
2. Select View/Edit Account information

EPIC Username: demo_01 Logout Credit Balance: 15 Timeout: 120 min

Manage Reports Manage Your Account **Personal Options** Help

NEW! Everything DiSC® Worksmart is now available on C... View/Edit Account Information

Quick Links

+ Customize Your Home Page Customize

My Personal Settings
Manage Custom Messages
Manage Report Tailoring
Create Sample Reports
View Sample Email Templates
View Privacy Statement

First Area to Complete / Update

1. This Area allows for your Company Branding on Assessment Report Covers
2. These fields are Mandatory
3. Other examples of data you might want to include

Report Cover Contact Information 1.

Your respondent will receive a notice to complete the assessment at the following locations:

1. All emails sent from this account
2. The profile report cover
3. The initial "Splash" page and final "Thank You" page on the Respondent's online assessment website
4. The "Provided By" branding on "MyEverythingDiSC" accounts created by your Respondents

Company Name: TRC-The Resource Connection LLC 2.

Contact Email Address: info@resourceconnection.com 3.

Phone Number: 1059 Edgewater Drive 509-555-5555

Contact Line 4: Orlando, Florida 32804 509-555-5555

Contact Line 5: 407-426-0511 Toll Free 888-426-0511 509-555-5555

Contact Line 6: Website: www.resourceconnection.com 509-555-5555

Contact Line 7:

Next area to review is your Company Information

1. Enter or Edit your Company Name (this is a mandatory field)
2. Add your logo! (this will print on Assessment Report Covers)

Company Information 1.

Account ID: 16033

Company Name: TRC-The Resource Connection LLC Demo 1.

Company Website: 2.

Company Logo: 2.

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

Upload Logo

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

Emails Sent from My EPIC Account Section

1. Administrator Name (can be used as part of email subject line, use a recognizable Name or Area of your Company for your Learners)
2. This is the Email Address your learners receive to take their Assessment (Best Practice, share this ahead of time for learners to know what to look for)
3. Email Subject Lines, can be customizable
4. Email addresses here receive notification if checked, the primary email is the only one to receive any bounce back notifications

Emails Sent From My EPIC Account 1.

Administrator Name: Penny Proctor 1.

Outgoing "From" Name: TRC EPIC Training 2.

Email Display: TRC EPIC Training <penny@wiley-epic.com>

Assign Access Code Subject: 3.

EPIC Email System Variable: 3.

Email Format: HTML Plain Text

Email EPIC System Notifications to: 4.

Notifications Email Addresses: 4.

Default Profile Completion Email: Send notification email when a respondent completes a profile

Last Section of Account Setup Page

1. These settings are quite self-explanatory and usually require little updating.
2. Know your Time Zone especially if your company has multiple locations
3. Be sure to scroll all the way down and click Save whenever any changes are made

Credit Reminder 1.

Credit Balance Reminder: 5

Language Options 1.

Site Language: English

Default Product Language: English

Time Zone Settings 2.

Time Zone: Eastern Time (US & Canada), Bogota, Lima (GMT-5) 2.

Advanced Options 3.

Session Timeout: 120 minutes

Allow viewing reports online by default

Enable Future Delivery and Auto Reminder feature for assigning Access Codes

Allow me to customize the subject line for the Auto Reminder email

Save 3.

