EPIC: Creating Folders and Sub-folders

Folders and sub-folders are used in EPIC in much the same ways as on your computer. The big convenience of them is to quickly find individual and team assessments.

Programs/websites needed: EPIC

Creating Folders and Sub-folders in EPIC:
1. Outside of organization, the most convenient thing about creating folders and sub-folders in EPIC is the easy searchability of profiles.
2. When creating a folder, consider using broad names. For example, Company Name, Department Name, Team Name. Depending on your organization, you could also use years: 2018, 2019, 2020, etc.
3. Sub-folders are for narrowing your folders even further. Consider more specific titles, such as Department Name, Team Name, or, depending on your organization, assessment type.
4. You can create folders and sub-folders when you assign access codes, OR
5. You can manage them by going to Manage Your Account→Folder Maintenance
6. Here, you can create new folders, new sub folders, rename folders, and delete folders. You can also transfer contents of one folder into a different folder.

Examples of folder organization:
Folder: Atlantic Bottling Company. **Sub-Folders:** Atlantic Branch, Ames Branch, Cedar Rapids Branch, Ottumwa Branch, Des Moines Branch, Mason City Branch, Dubuque Branch, Quad Cities Branch, Spirit Lake Branch.

Folder: Weston Financial. **Sub-Folders:** Insurance, Accounting, Executive Board, Administration, Investments.

Folder: 2018 **Sub-Folders:** DiSC Comparison Reports, DiSC Management, Productive Conflict (recommended only if you use DiSC only for a single organization)

Folder: DiSC Workplace **Sub-folders:** 2017, 2018, 2019

Folder: Hamilton Manufacturing **Sub-folders:** Marketing, New Hires 2019, Floor Managers, Office Managers, Welding, Distribution

Folder: Metro Area Schools **Sub-folders:** Disc Workplace 2016, DiSC Workplace 2017, DiSC Workplace 2018