EPICTRACK USER GUIDE

12.2024

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Overview

EPIC Track Server is a web-based application that allows for six functions within the EPIC Track program.

Add/ Manage Users
Add/Manage Lists
Create/Manage Events
View Event Status
Run Reports
View Account Status

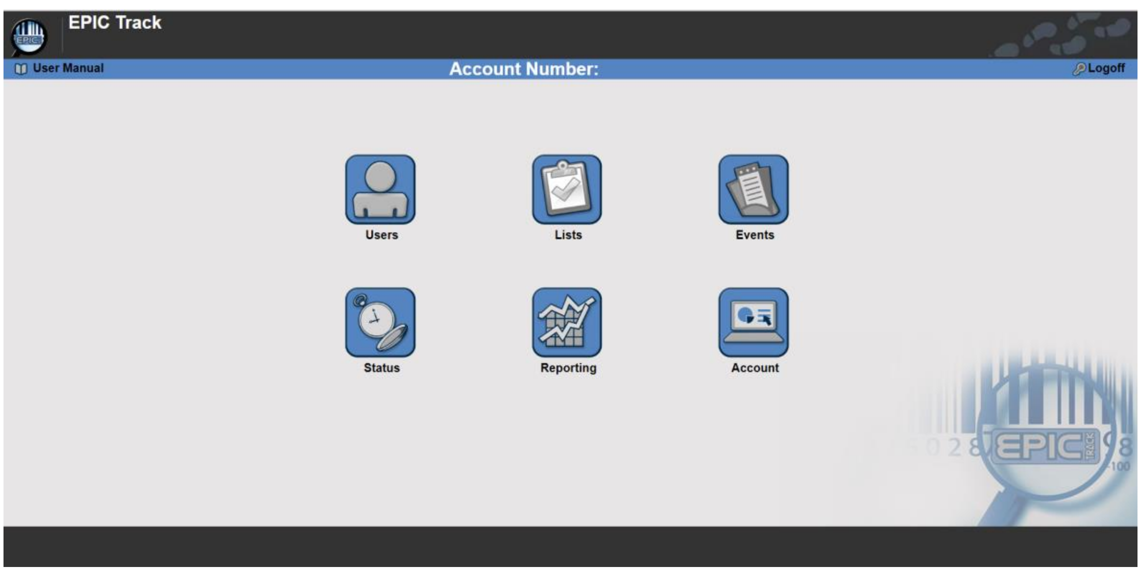
Log-In

1. To access the EPIC Track Server, open your internet browser and type the following URL https://www.epictrackserver.com/ you should now see the screen below.

   Note: Epic Track is generally tested in Internet Explorer, Firefox, Safari and Chrome. Since these change frequently, we may request that you use a particular browser or version from time to time for compatibility reasons.

2. Enter the username and password provided by your account administrator.

3. Once successfully logged in, you will see a screen similar to the one below.

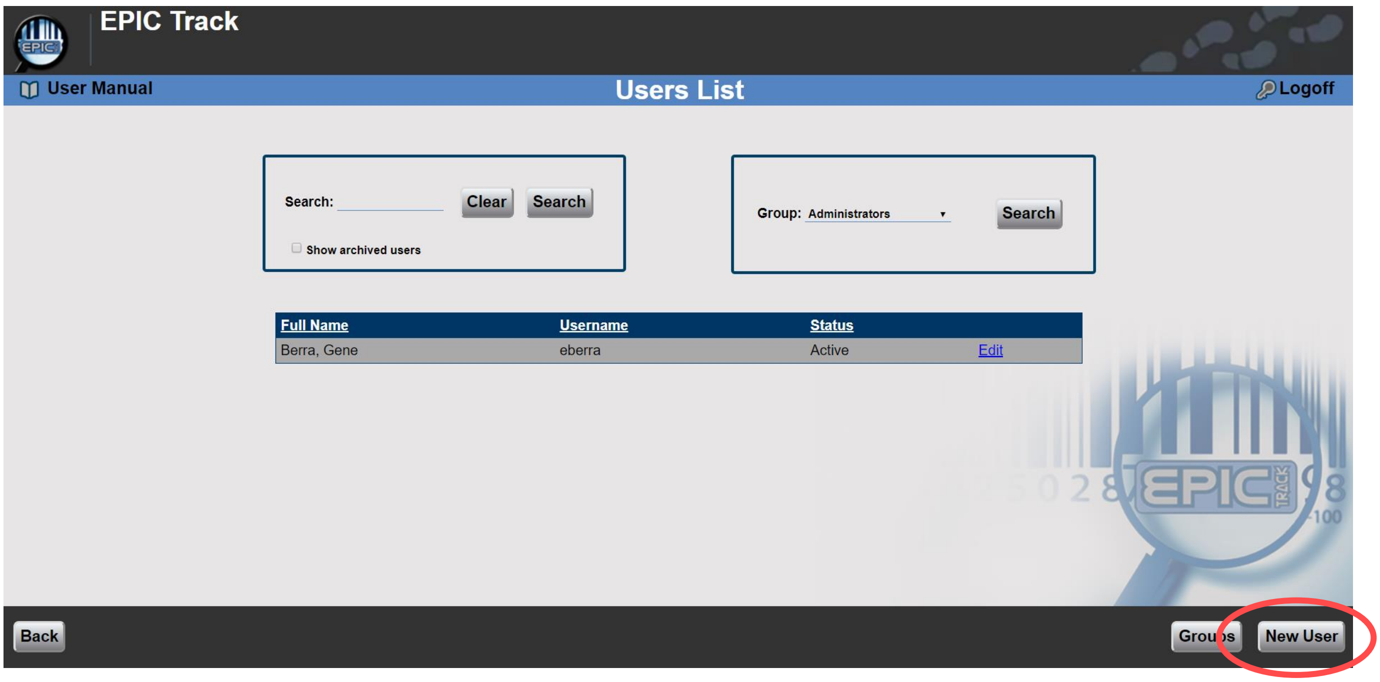


Note: You may not see all six of the icons based upon the account privileges. You will find the link to the User Manual in the upper left corner of the screen. Also, your account number is located in the top middle of the screen.

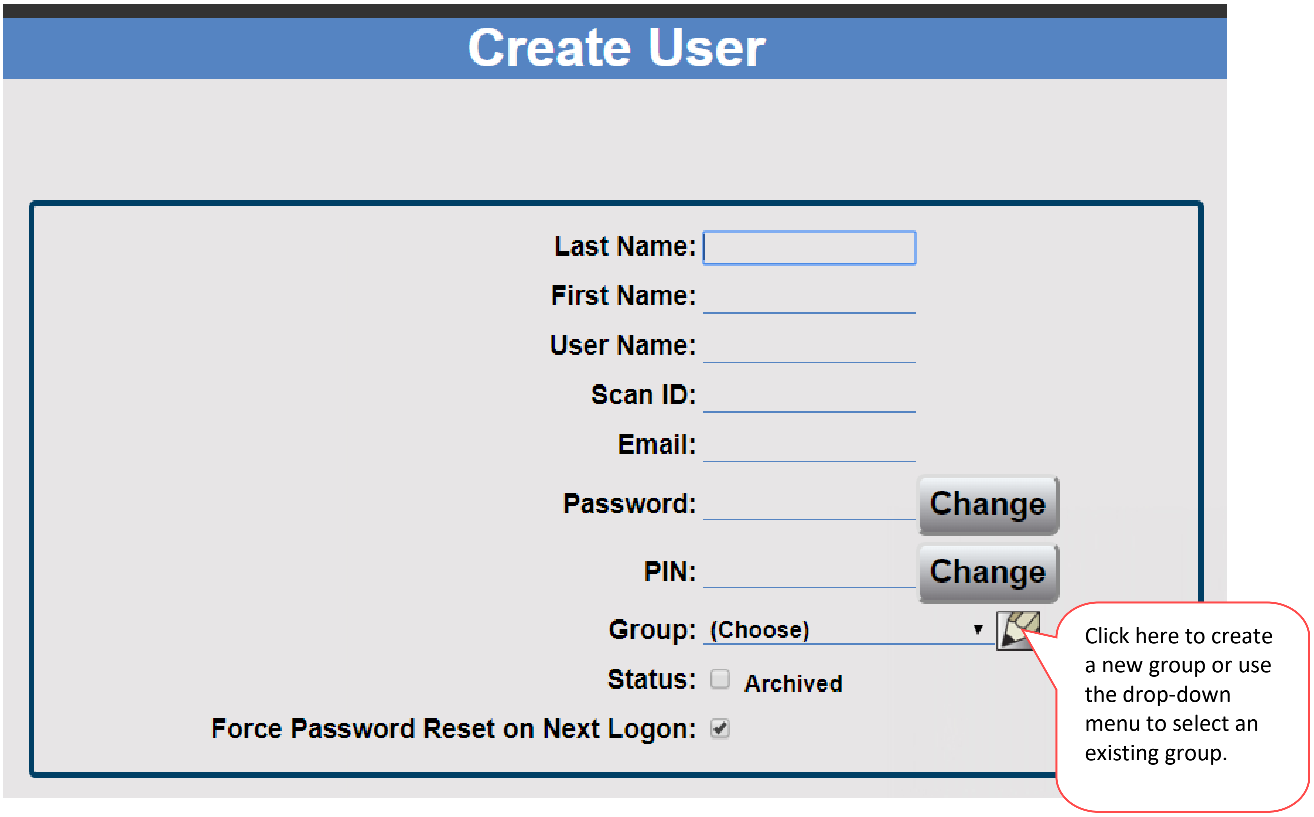
Creating Users/Groups

To create users/groups and assign or modify privileges use the following steps.

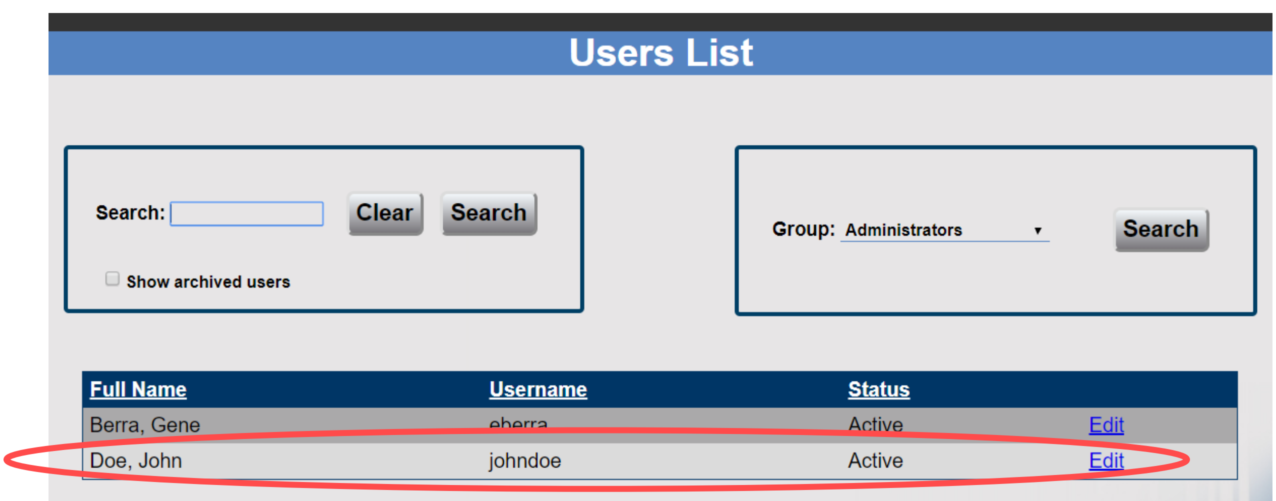
1. After logging into EPIC Track Server, click on the Users icon.
2. To create a new user, click on the New Users button as shown below:



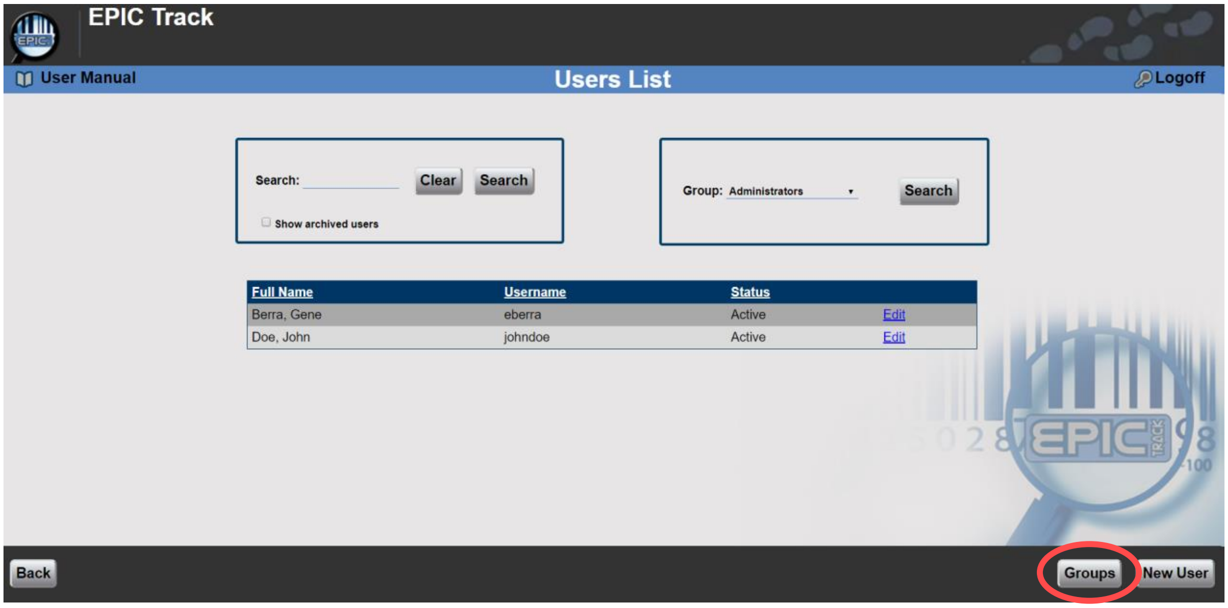
3. Fill in all of the data elements as shown on the screen below.
    a. Scan ID, Email and PIN are not required.



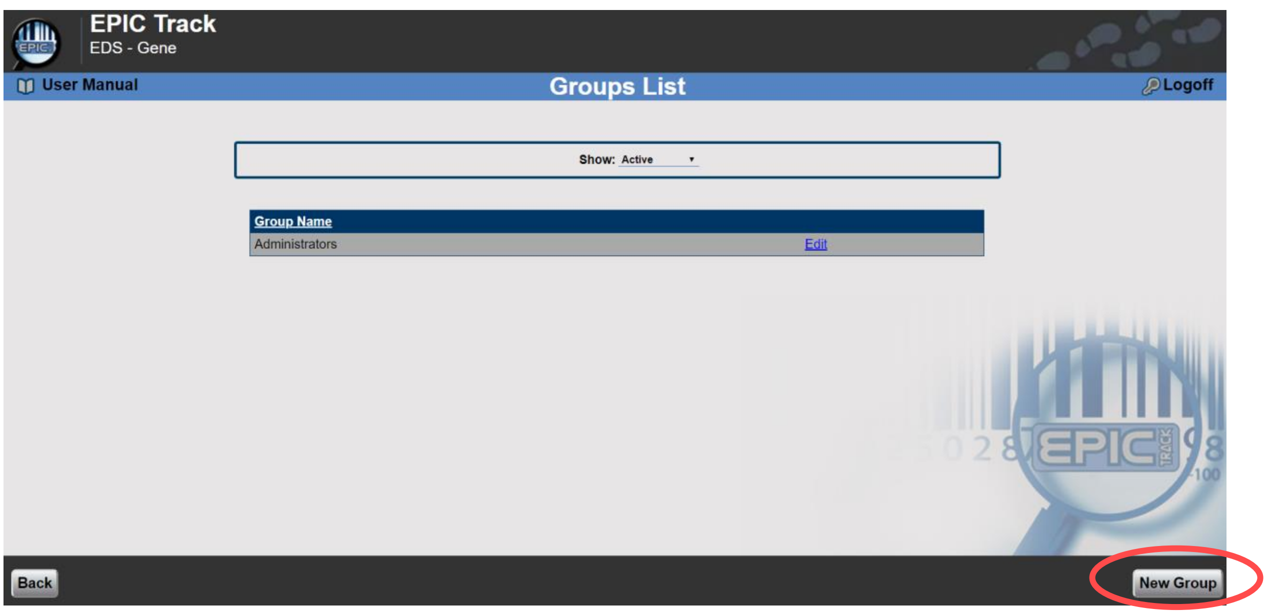
4. Click Save, to save the new user you created. You should now see the new user display on the Users List screen, as illustrated below.



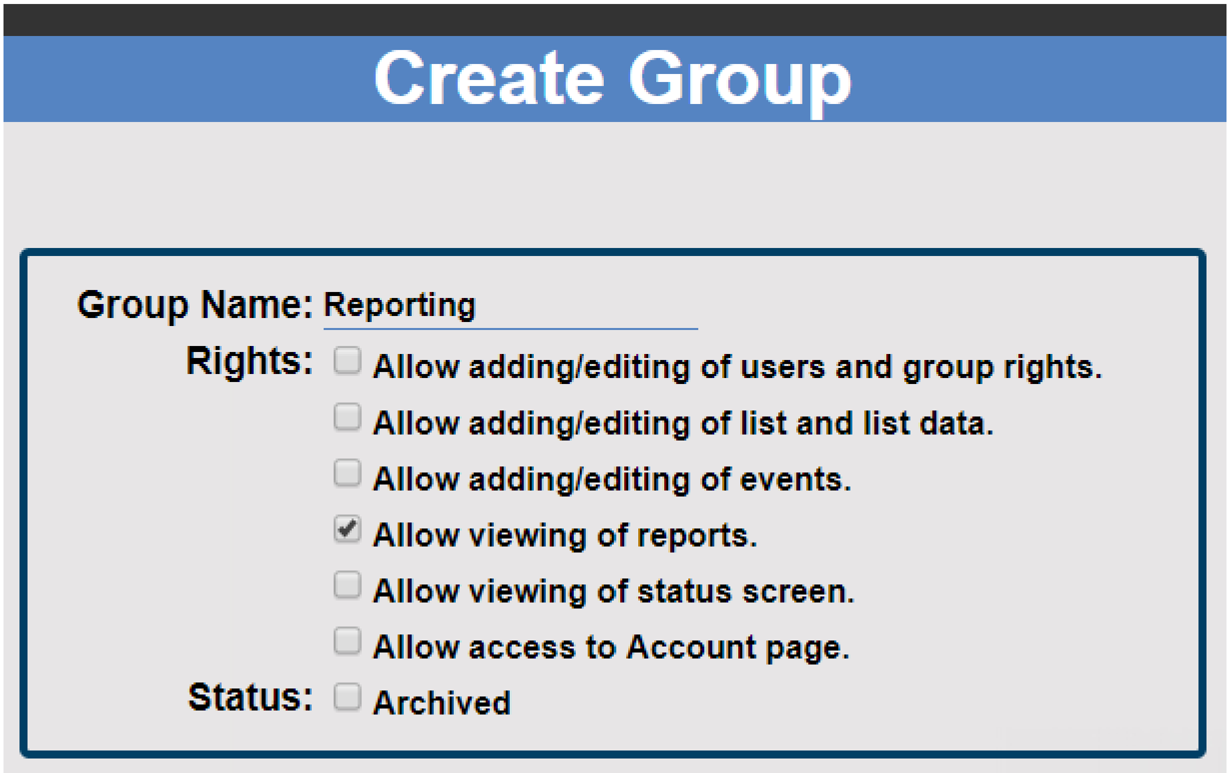
5. To create a new group, click Groups in the Users List screen as shown below.



6. Select New Group.



7. From the Create Group screen, you can name your group and select any rights that you want to assign to this group. Once finished, click Save to save your new group.



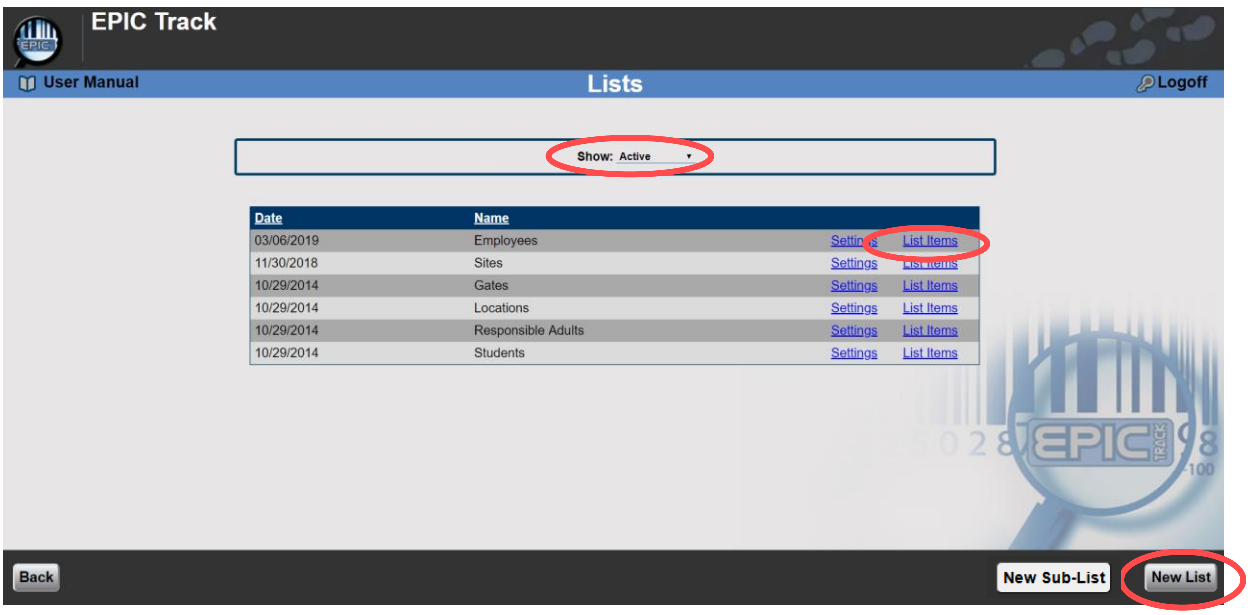
If you no longer have use for a Group, you can Archive that group by checking the Archive button.

Creating Lists

Lists can be created for anything that will be tracked using EPIC Track. Please remember that lists can be people, places or things. Lists can be created manually through the EPIC Server screens, explained in the following steps. Lists can also be generated automatically by using the EPIC Data Connector Tool.

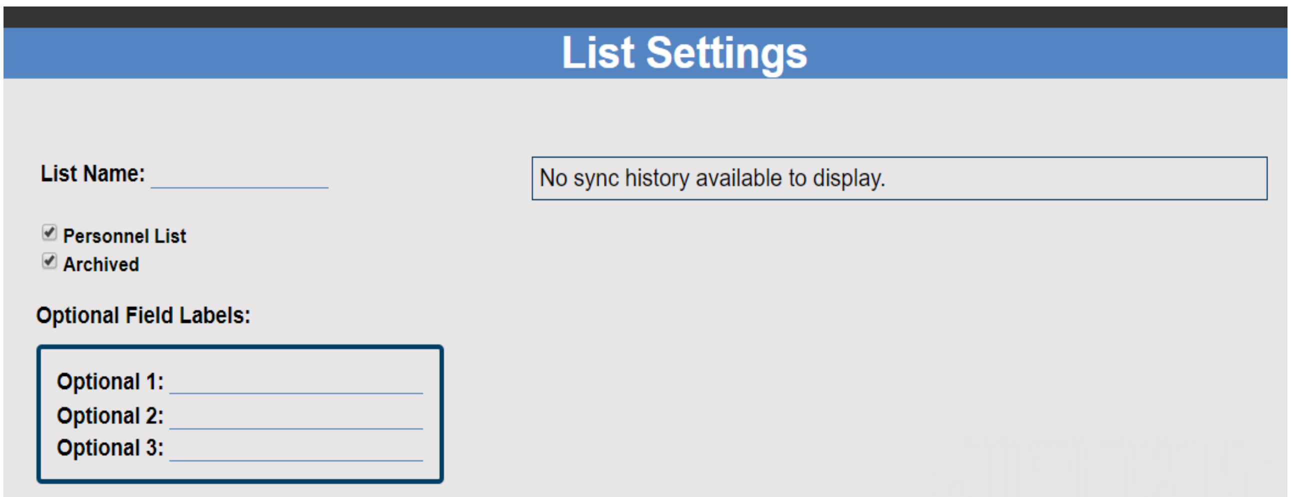
Note: Please see the section on EPIC Data Connector for more information.

1. From the EPIC Track Server screen, click on the Lists button.
2. You should now see the lists screen as shown below.
3. From the screen you can select to "show" Active or Archive lists, click "List Items" to modify an existing list, or click "New List" to create a new list.



4. Click on "New List" to manually create a new list of people, places, or things.

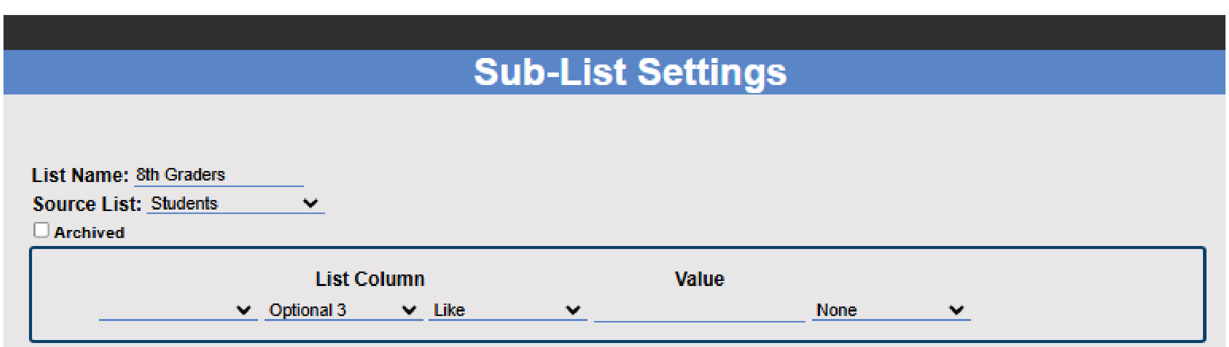
5. You should now see the List Settings screen. From here you can name your list using the List Name Field.
    a. Personnel List - check this box if this will be a list of people with a first and last name.
    b. Archived – Check this box to archive the list.
    c. Optional 1 – Give the additional field a name if you intend to use the optional field (i.e. Company).
    d. Optional 2 – Give the additional field a name if you intend to use the optional field (i.e. Hard Hat #).
    e. Optional 3 – Give the additional field a name if you intend to use the optional field (i.e. Birthday).
6. Once you have entered the necessary information, click Save List.



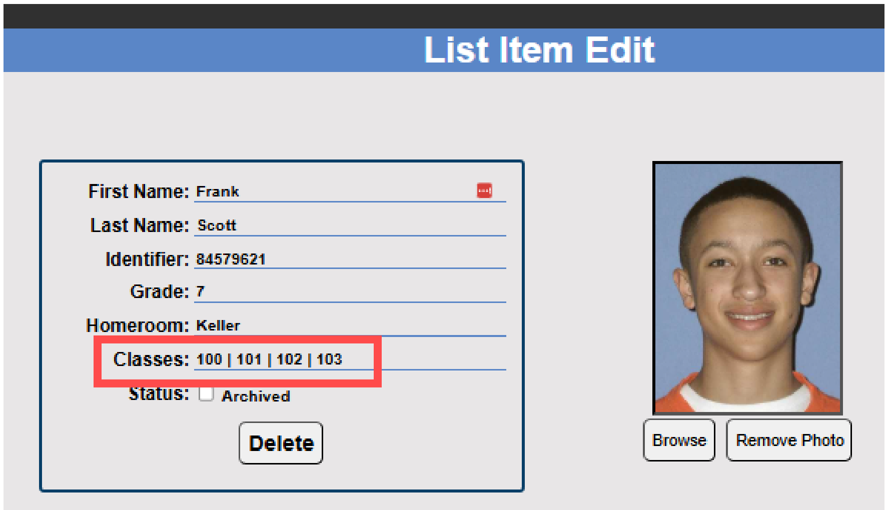
Creating Sub-lists – Simple

Sub-lists can be created from main lists to create unique lists for specific people, groups, categories, etc. The sub-lists utilize the additional text fields for parsing. Sub-lists do not count towards the number of active records you are licensed for.

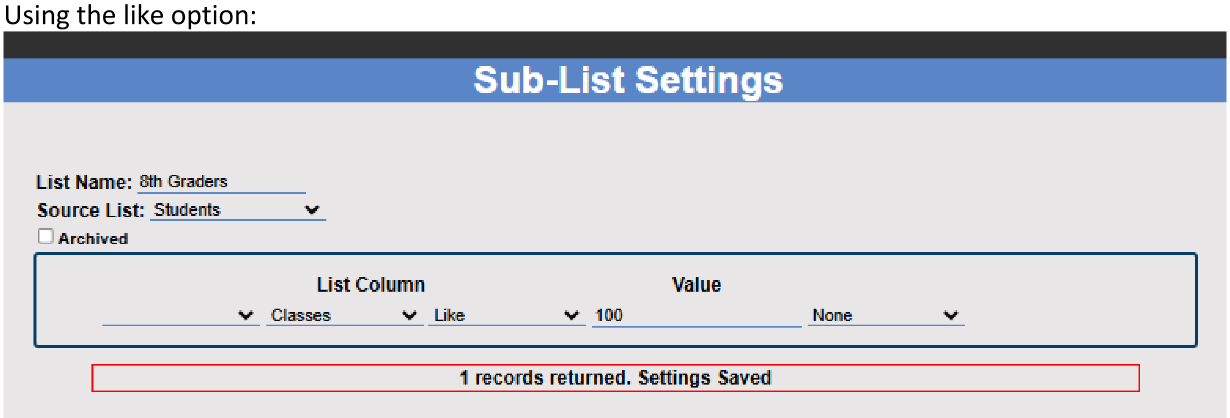
1. Once in the List Section, click on New Sub-List in the bottom right corner.
2. Give your list a name and select the source list to pull from.



3. Under List Column select the field you would like to use to create the sub-list.
    1. Select “like” if you want to grab records that contain any portion of your value.
        i. Example data in text field:

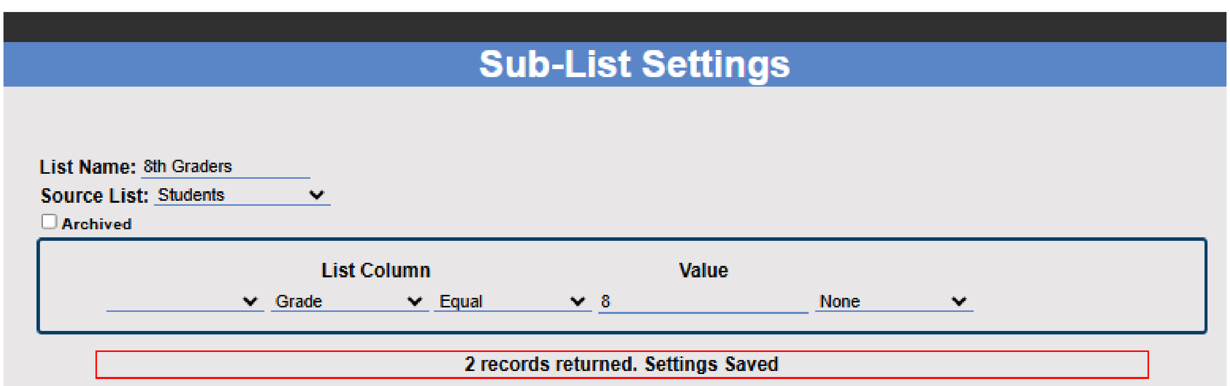


Using the like option:



If the equal option was chosen, it would not find a match because the field contains other values.

2. Select “equal” if you want only those records that match.



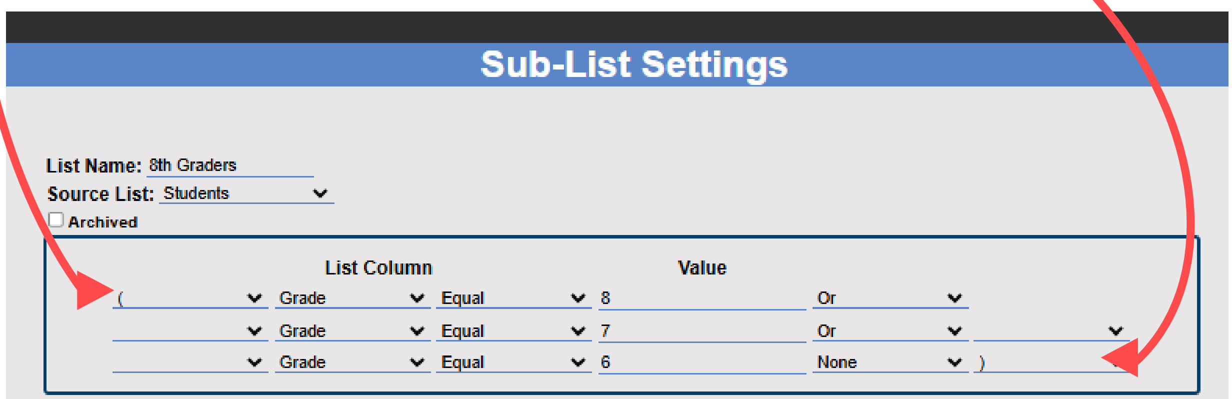
Returns only those records that match the given value.

Creating Sub-lists – Advanced

This section will show how to add multiple lines of criteria for the sub-list.

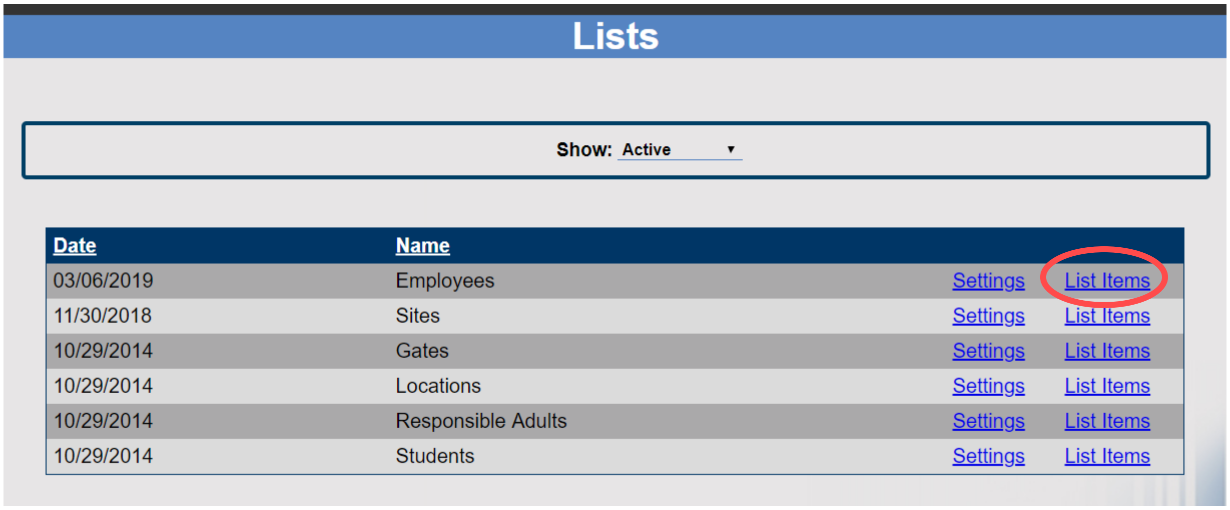
1. Follow the previous steps in Creating a Sub-list – Simple.
2. To add a new line, select "(" in the first dropdown and then select "and" or "or" in the last dropdown.
    a. Selecting "and" will require the record to meet all criteria from each line.
    b. Selecting "or" will return records that meet criteria from only one line.
3. Repeat the process of selecting you field > like/equals and the value.
4. If this is the last row, make sure to select ")" in the last dropdown.

The example below will give you every record in 6th, 7th or 8th grade.

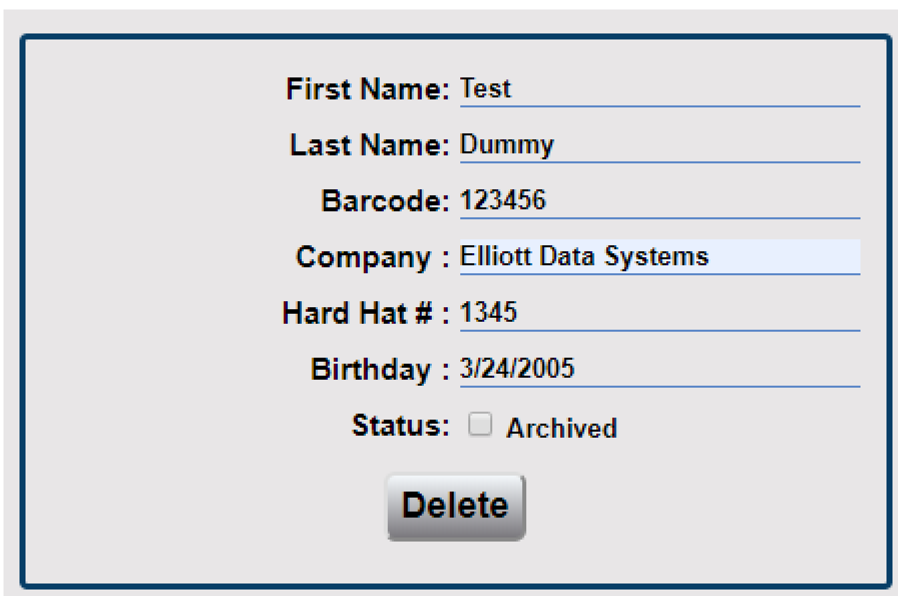


Adding List Items

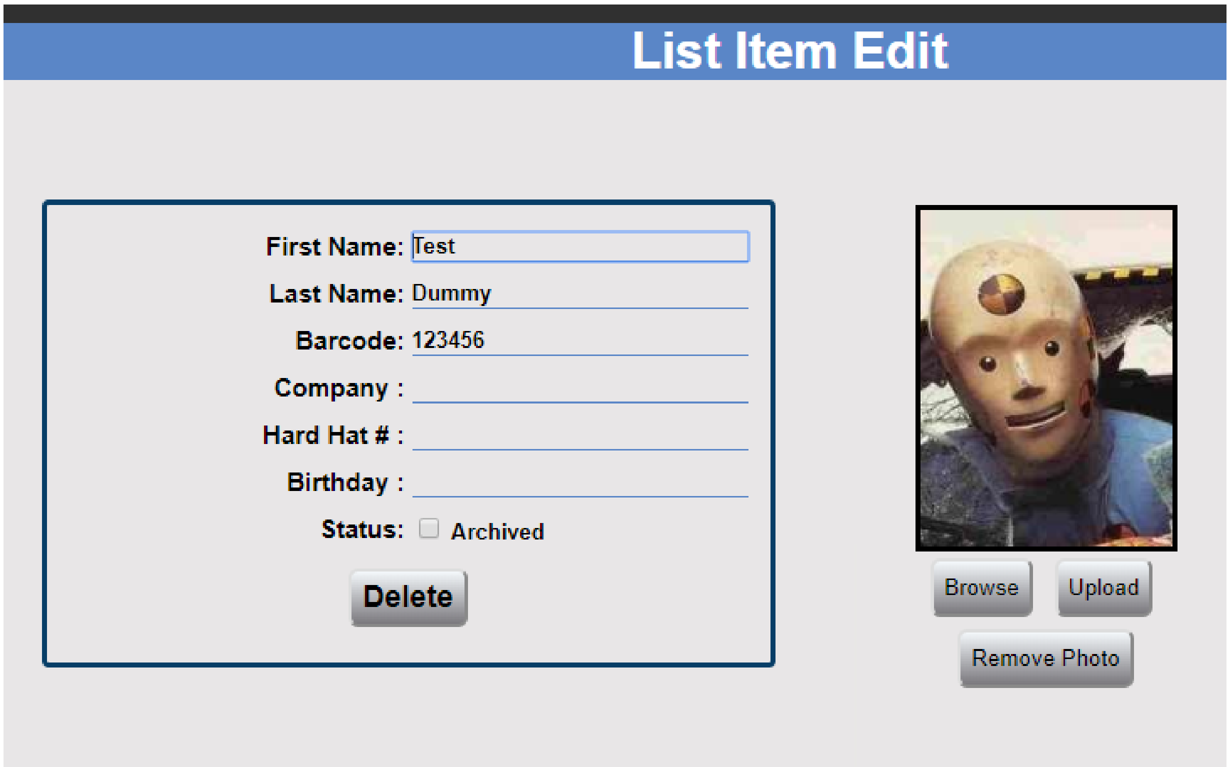
1. Click List Items next to the list you would like to add items.



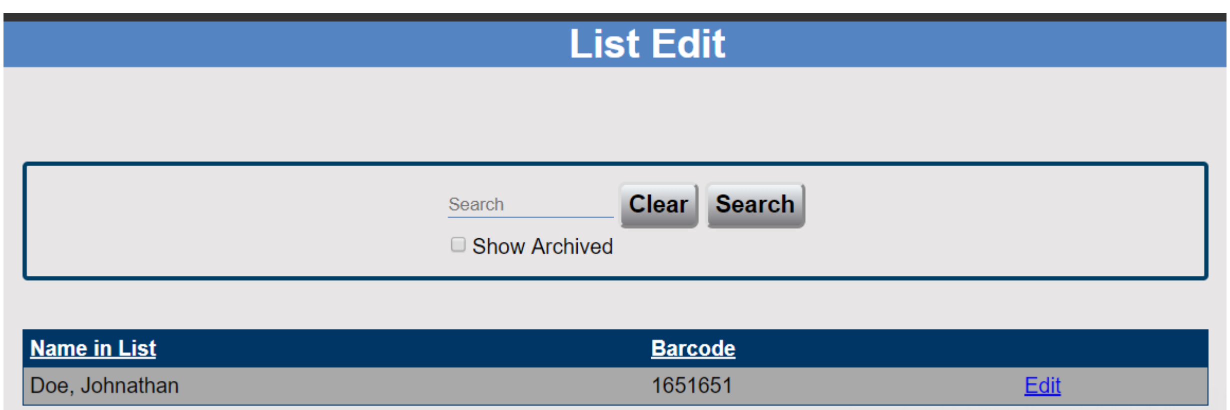
2. Click New List Item in the bottom left hand side.
3. Enter the records First Name, Last Name, Barcode and any additional fields.



4. To add a photo to your list item, click on the Browse button below the photo field. This will allow you to search for photos on any of your accessible drives. Once you select the photo you want, click the Upload button and it should appear in the "List Item Edit" Screen.



5. The last step is to click "Save List Item". You should now see your list item created as shown below.



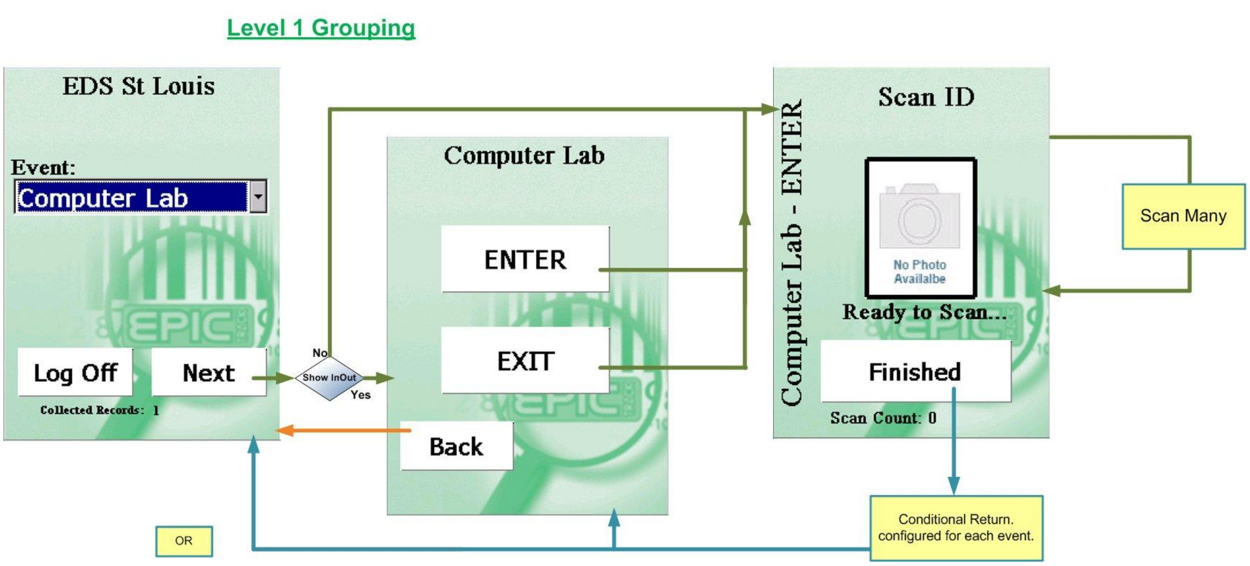
Events

Before going through the steps to create a new event, it is important to have a basic understanding of the logic behind creating events. Events can be configured for almost any tracking scenario. Simple events may only track items from one list, while complex events might track items from several lists that need to be associated together. When designing an event, it is important to understand what the main item you want to track is and set up the event so that item is the last list in the event. It is also helpful to understand the output or reporting that you want to get from a tracking event. By understanding the output, it is easier to design the event appropriately.
Below are some diagrams that show a simple and complex event displayed with all the steps included in the event.

Note: Lists need to be created before creating your events.

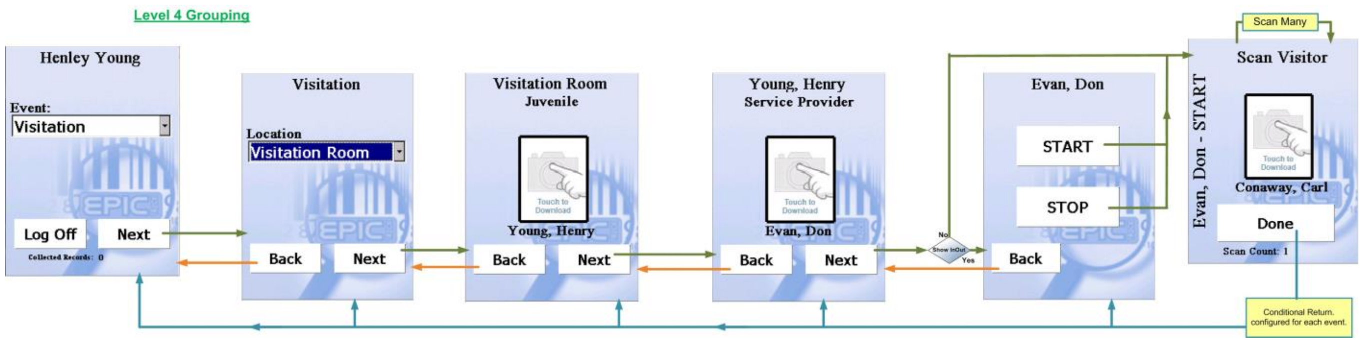
Level 1 Event Example

This is designed to track people or things from only one list. It is important to understand Levels. Level 1 events track one list, Level 2 Events track two lists and so on.



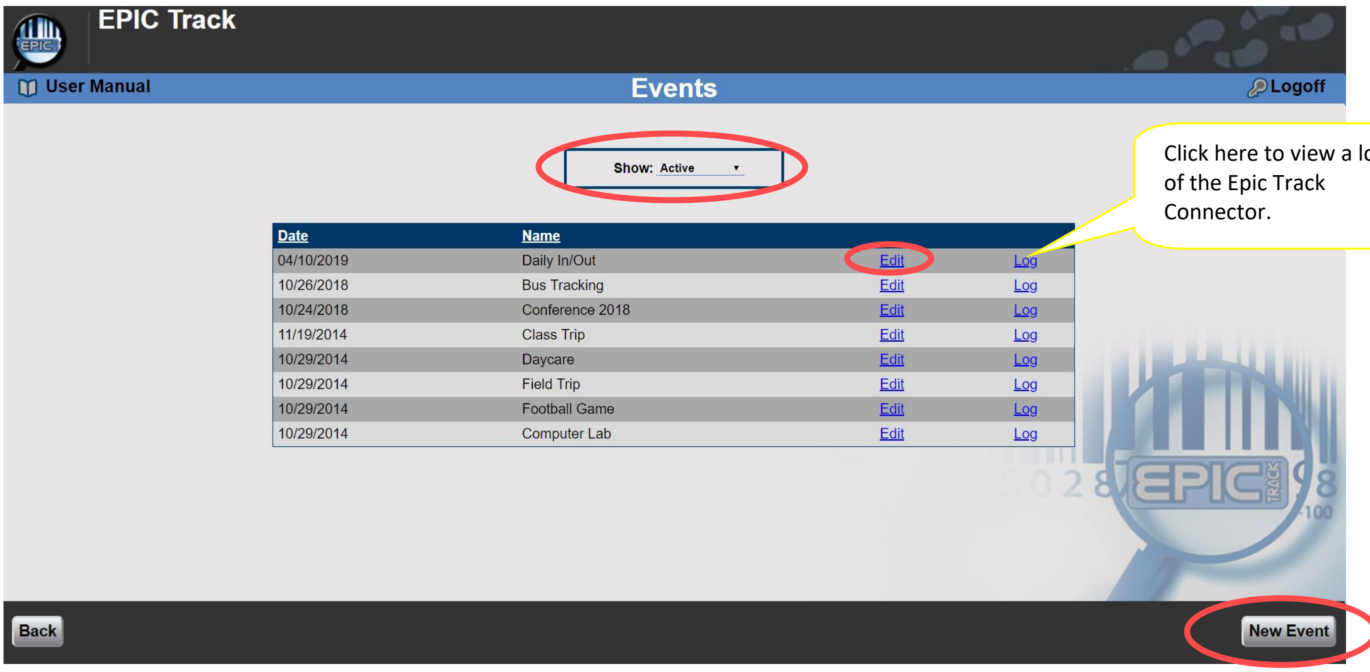
Level 4 Event Example

This is designed to track people or things from four lists. In the example below we are tracking a location, juvenile, service provider, and visitor.



Create Events

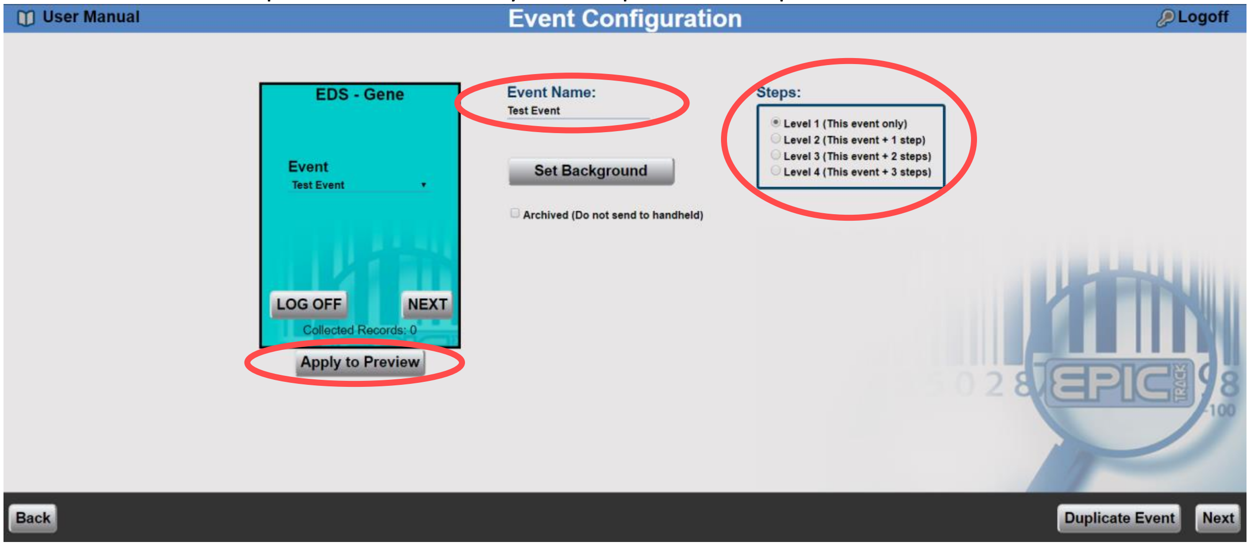
1. From the EPIC Track Server screen, select the "Events" button.
2. From the Events screen shown below, you can either edit an existing event, or create a new event. Please also note, the "Show" drop-down menu can be changed to either show only Active or Archived events.



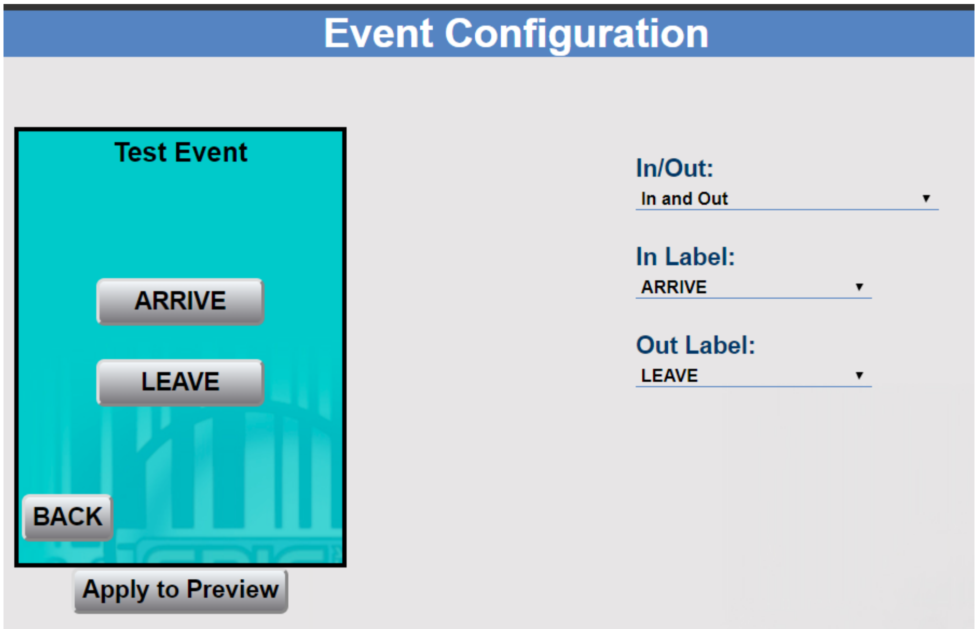
3. To create a new event, click on the New Event button.

4. You should now see the "Event Configuration" screen.

5. Name your event by typing in the Event Name field. Below is a sample event named "Test Event". You can click "Set Background" to change the background color of the event. From the Steps Menu, select the number of levels included in your event. In the sample, Level 1 has been selected. Click the Apply Preview button to preview the settings you have configured so far. Lastly, click "Next" to configure the next step in your event.
    a. Duplicate Event allows you to duplicate all steps and selections into a new event.

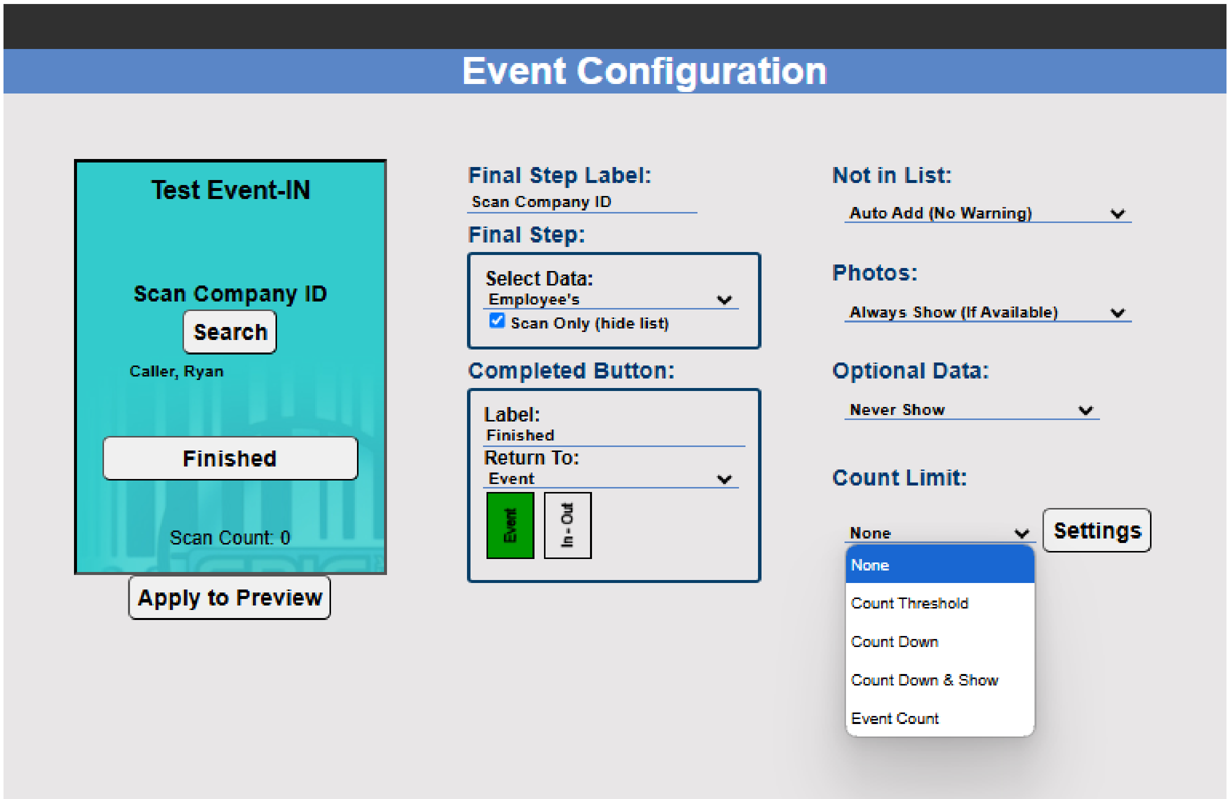


6. We will select In and Out from the In/Out drop-down.
7. We will change the label for In and Out to Arrive and Leave.
8. Click Apply to Preview to view changes.



9. After clicking Next, you should now be on the final step of the event. This is where you will configure tracking for the key item that you want to track.

a. Final Step Label – This will be the label on the scanning screen.
b. Final Step – This will be the list of what you are tracking i.e. Employees.
c. Completed Button – Change the label of the done button and select which screen to return to once you click done. In this example you can go back to the In/Out screen or go back to the events page.
d. Not in List – Decide what happens if the scanned item is not in the list.
    i. Auto Add – automatically adds the barcode to the list.
    ii. Passive – gives you the option to add or not add the barcode to the list.
    iii. Not Allowed – will never add the barcode to list.
e. Photos – show or not show photos.
    i. No Photo – will not show photos.
    ii. Click to Show – manually click to see photo.
    iii. Always Show – will always show photos if available.
f. Optional Data – show or not show the optional data fields.
    i. Auto Show on Scan - will automatically show optional fields on scan for a few seconds.
    ii. Click to Show – manually click to show optional fields.
    iii. Never Show – will not show optional fields.
g. Count Limit – advanced counting features that will produce a warning message when the count has been reached. Please contact your dealer for assistance.
    i. Count Threshold – prevents a predetermined number of scans in a given time period.
        1. i.e. – 1 scan during lunch period (1 hour). Attempts after the 1st scan would be flagged and a custom warning message appears.
    ii. Count Down/Count Down and Show – counts down on a value in the additional text fields in the list section.
        1. i.e. – students get 5 lunches a week. Attempts after the 5th scan within 7 days would be flagged and a custom warning message appears.
            a. The “show” option, shows how many scan remain for that time period.
    iii. Event Count – counts up and displays a custom message when the number of scans is met.
        1. i.e. – students are rewarded for checking into the library 15 times in a month. On the 15th scan, a custom message appears.



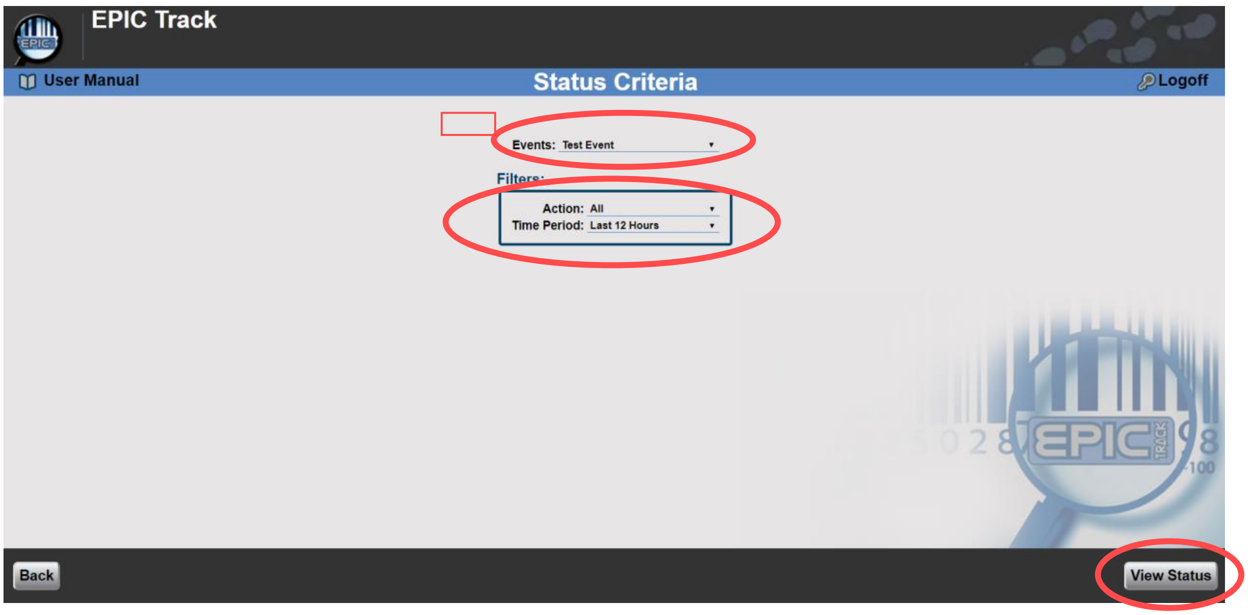
10. After clicking Next, you have completed your event. You should now see your event listed in the Events screen. It is now ready to use.

Date	Name		
07/29/2019	Test Event	Edit	Log
04/10/2019	Daily In/Out	Edit	Log
10/26/2018	Bus Tracking	Edit	Log
10/24/2018	Conference 2018	Edit	Log
11/19/2014	Class Trip	Edit	Log
10/29/2014	Daycare	Edit	Log
10/29/2014	Field Trip	Edit	Log
10/29/2014	Football Game	Edit	Log
10/29/2014	Computer Lab	Edit	Log

Status Functions

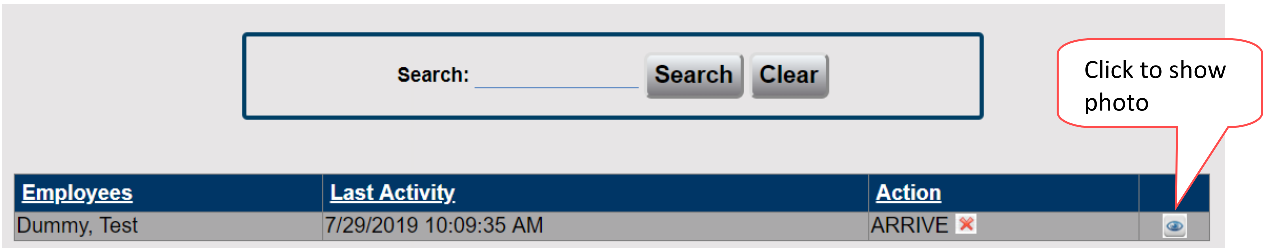
The status function serves two purposes. The first purpose is to monitor status in real time for events you have created. Second, it can be used as a mustering solution by identifying people or items from a list that have not been checked in. This is typically used for evacuation scenarios but could be applied to other applications also.

1. From the EPIC Track Server screen, click on the Status button. You should now see the Status Criteria Screen.

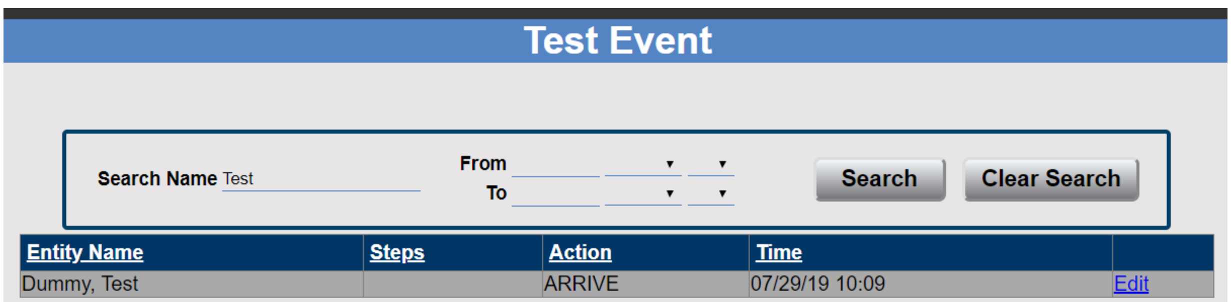


2. From the Event drop down menu, select the event you want to see the status. For status, use the drop-down lists under "Filters" to select the action you want to monitor in the status screen, and the Time Period you want to see the status.
3. Click "View Status"

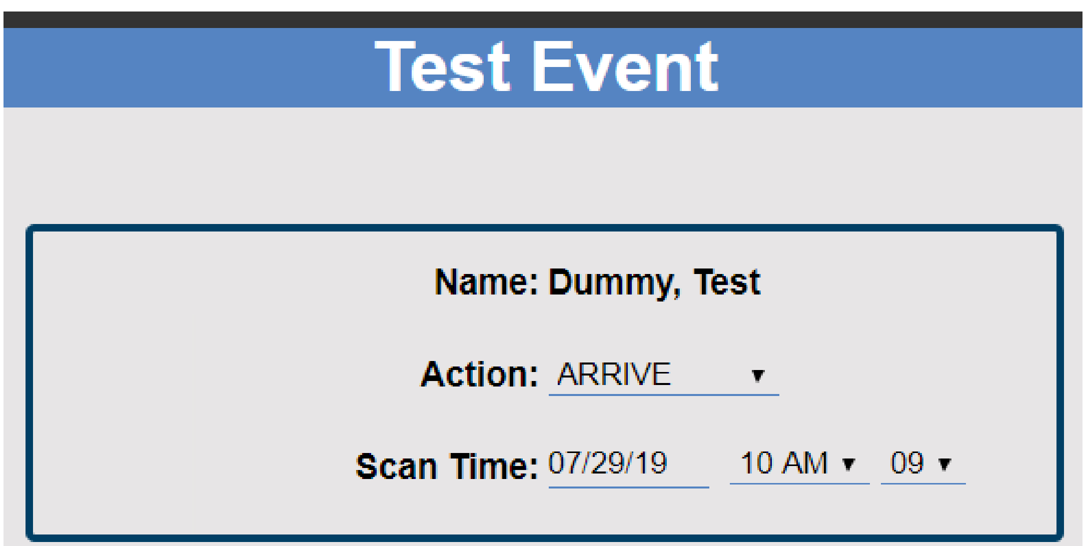
4. You should now see the status for your event. This screen will update in real time as people or things are active in the event. You can also see many pieces of data, including the last activity and action for the event. Clicking the icon on the right-hand side of the line for a particular record, will also display the photo associated with this record.
5. Use the search box to search by name.
6. You can check someone out by click the red X next to the In action.



7. If you need to Modify the transaction, Select Modify Transactions in the bottom right hand corner.
8. Search for the person needing modified, Select Edit.



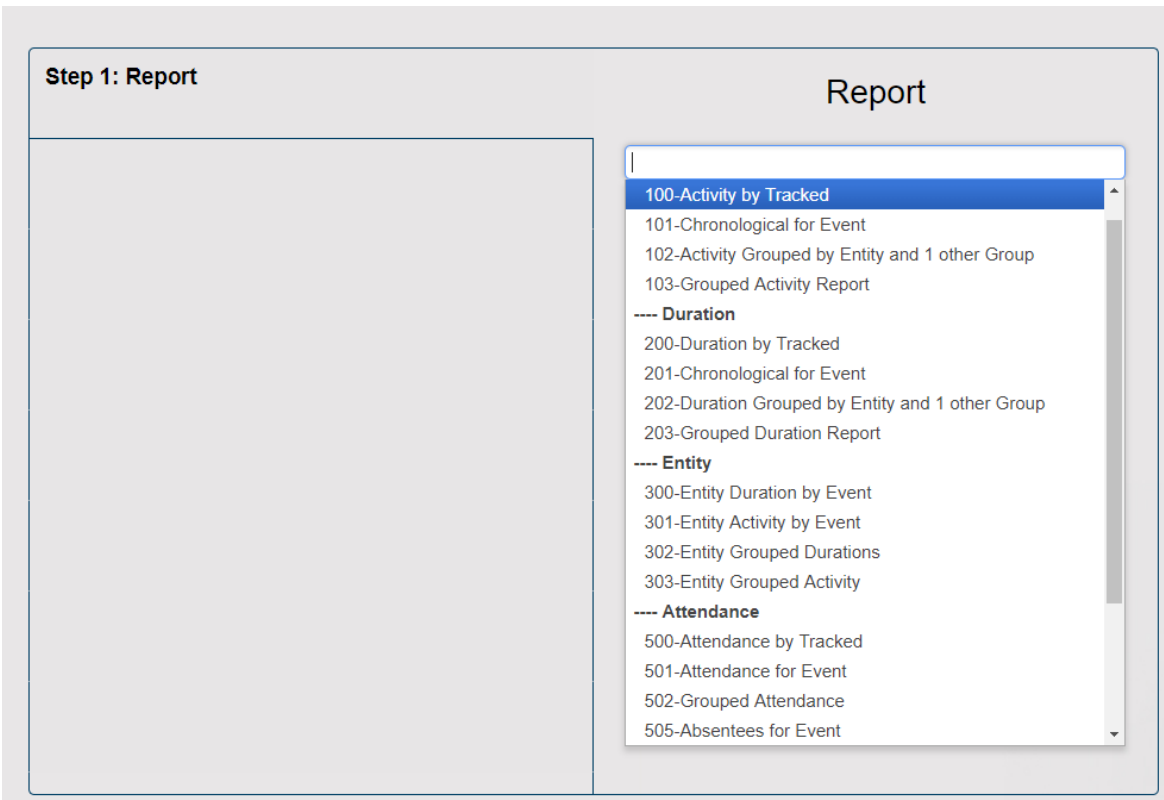
9. Modify the transaction accordingly.



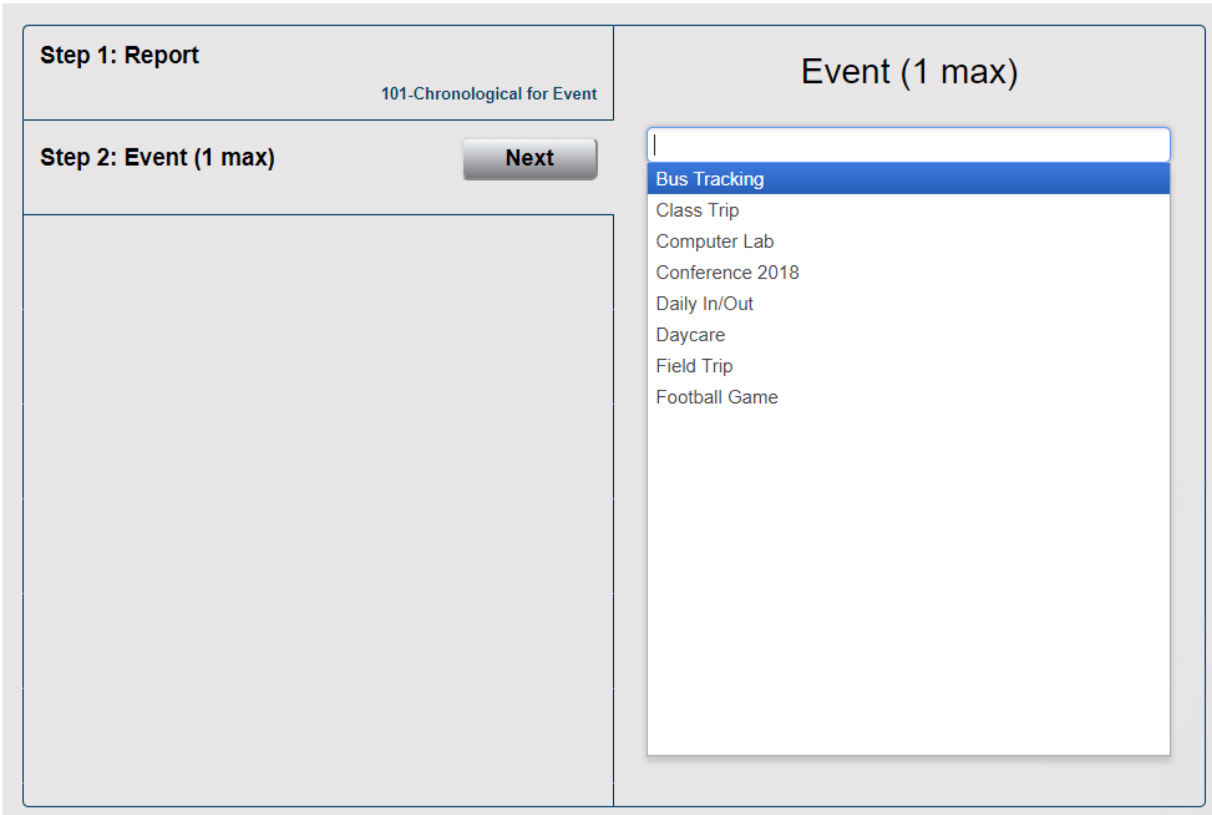
Reporting

The EPIC Track reporting tool provides an easy way to analyze data collected through EPIC Track.

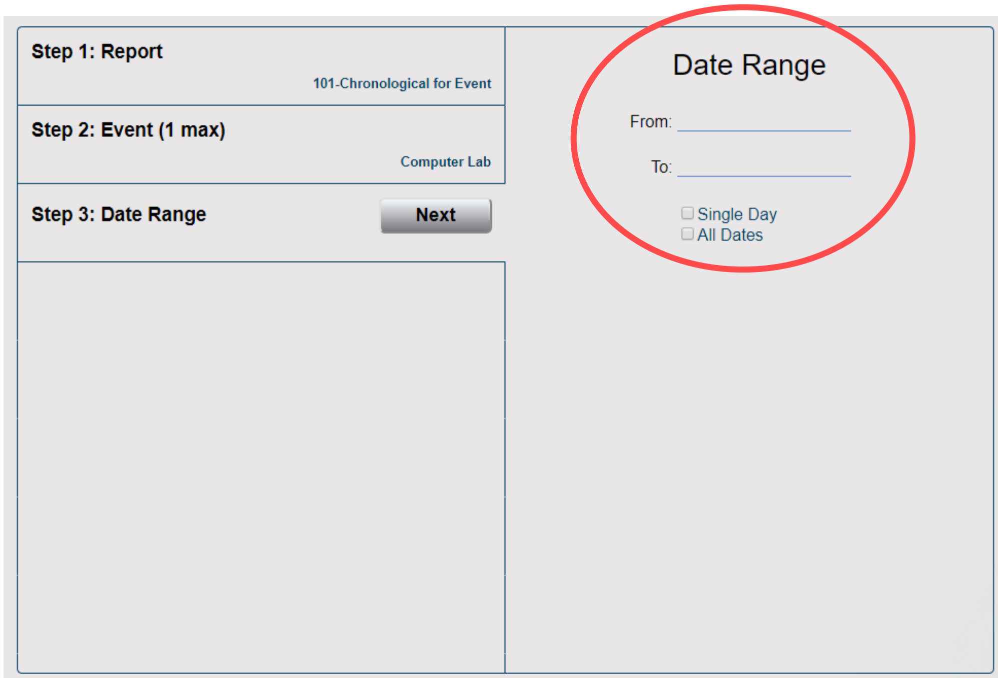
1. From the main EPIC Track Server screen, click on the Reporting icon.
2. From the “Reporting Screen, select the type of report you want to see.
    a. Activity – shows all activity from an event.
    b. Attendance – shows those who attended or did not attend and event.
    c. Duration – duration of list items for an event.
    d. Entity – tracking of one list item through event(s).
    e. Lists – view or export your list into csv format.



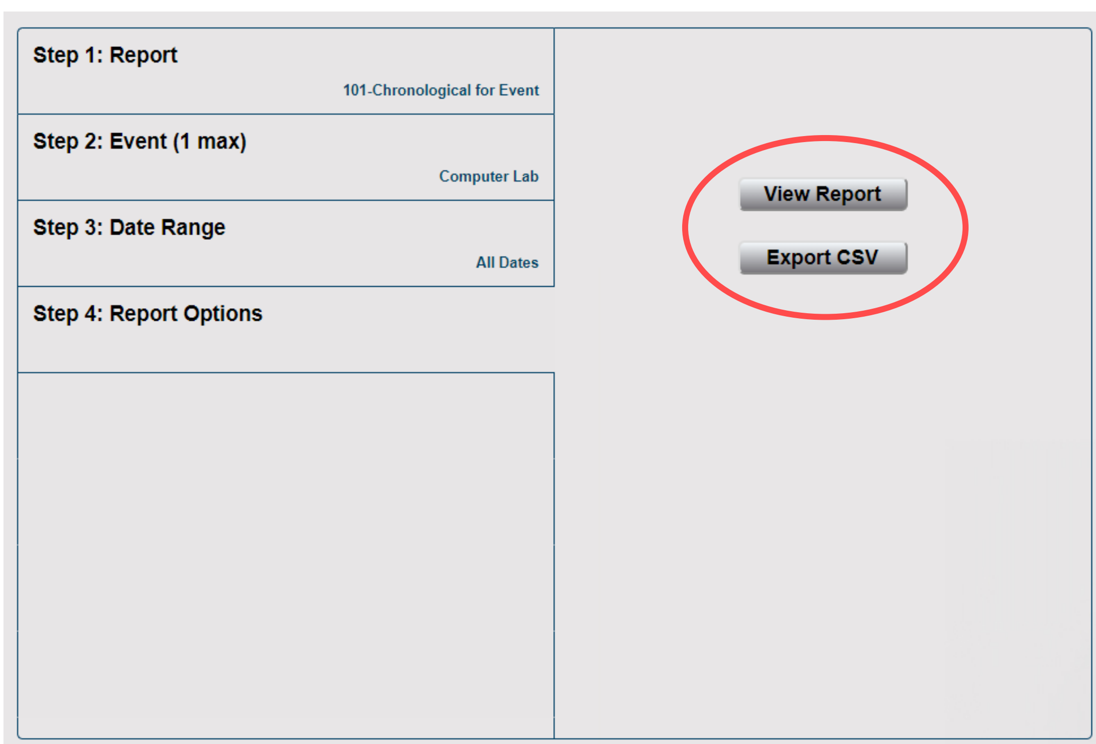
3. Follow the steps on the left-hand side. Some reports may only have a few steps while others will have more.



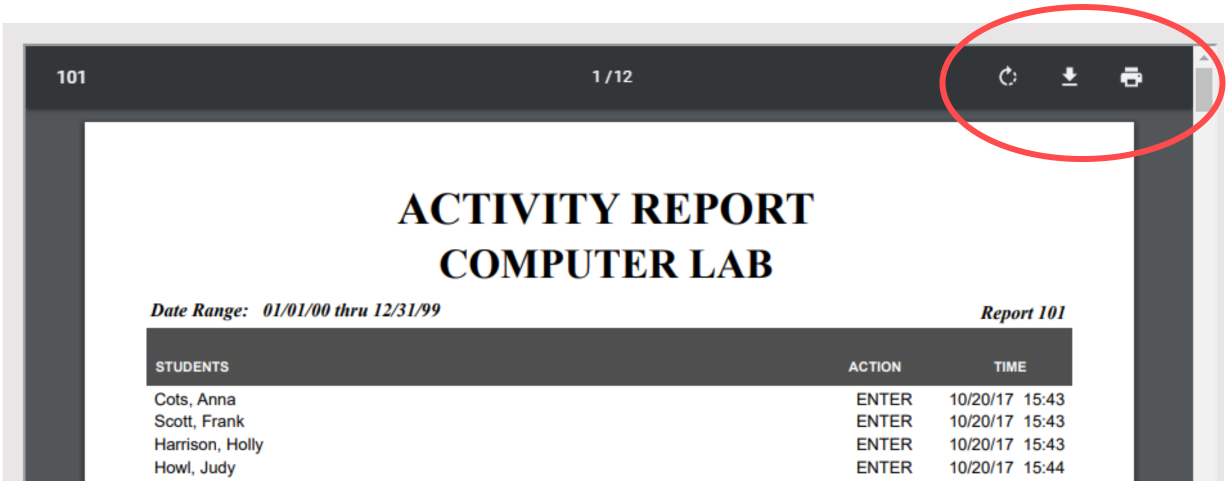
4. Now type in the “From” and “To” date that you would like to see on your report, or you can select the check box for a single day or all dates.



5. Finally, click Preview or Export to view your report.

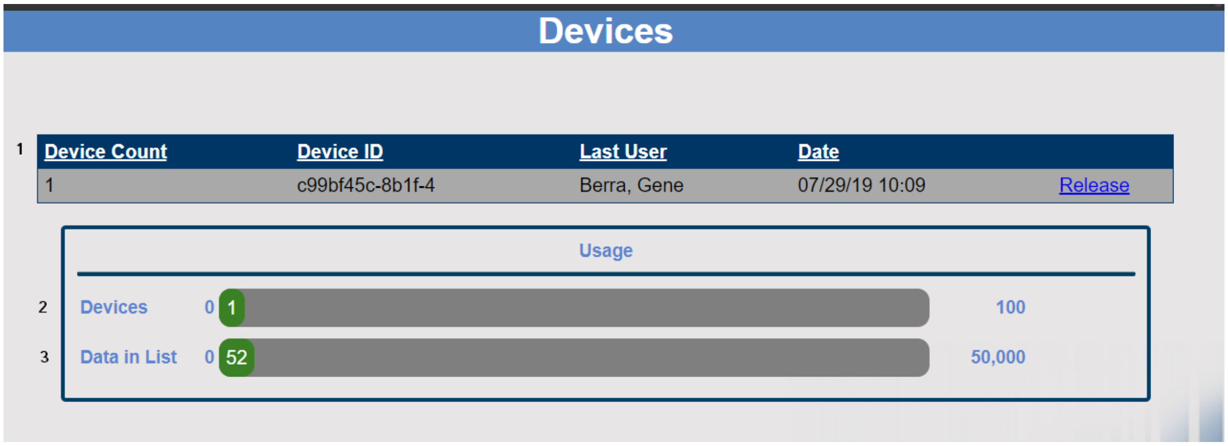


6. From the report preview you can use the toolbar to do several functions such as print, export, and tab through pages in the report, zoom in/out, or view the page in full screen.



View Account Details

The account screen allows you to view account information such as data in your list, devices used and registered devices.

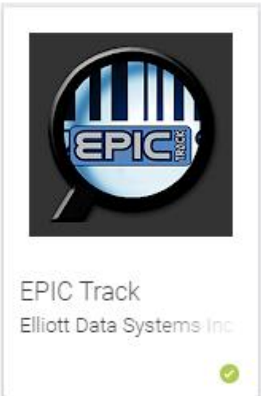


1. Registered Devices – will show any devices that are currently registered. Registration happens when logging in to https://www.epicrtrackweb.com or by logging into the Epic Track mobile app.
    a. Epic Track is based on concurrent licenses and once your limit is hit, no one will be able to login. Please contact your account administrator to add additonal licesnes.
    b. To free up licenses, click Release next to a registered device which will releasae that license.
2. Devices – this will show you how many devices are registered versus how many you are licensed for.
3. Data in List – this will show you how much data is in your list versus how much you are licensed for.

Epic Track App

The Epic Track app opens up infinite more tracking possibilities with the ability to track anywhere with a network connection (via WIFI or mobile network). The Epic Track app is available in the Apple App Store or Google Play. Simply search for Elliott Data Systems and download Epic Track.

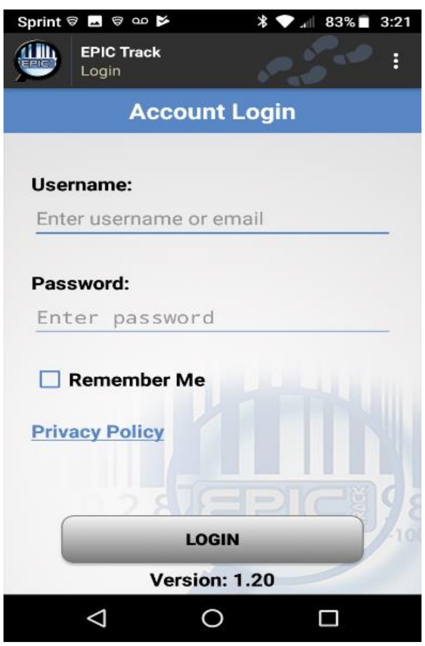
Google Play



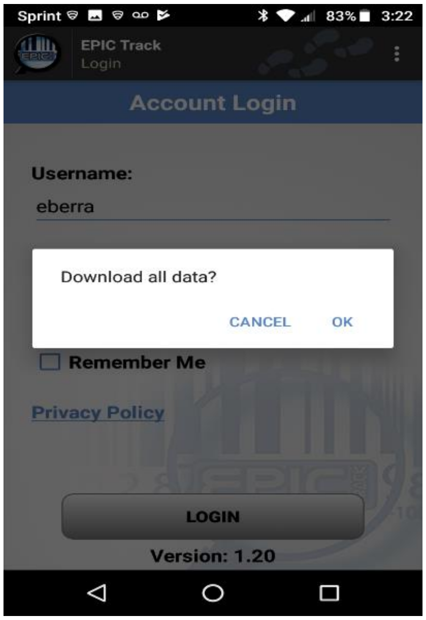
Apple App Store

Using the Epic Track App

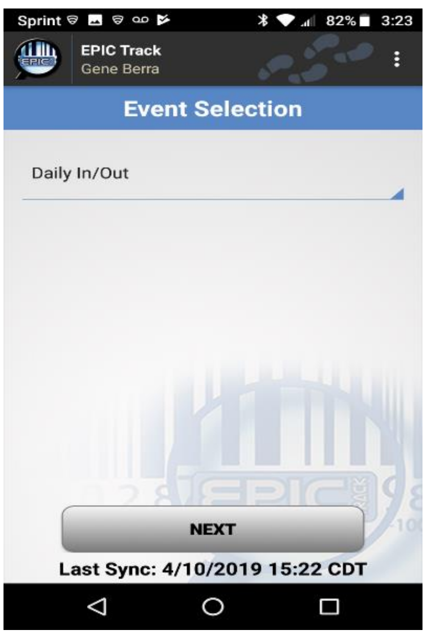
1. Login with supplied credentials.



2. Download all data.

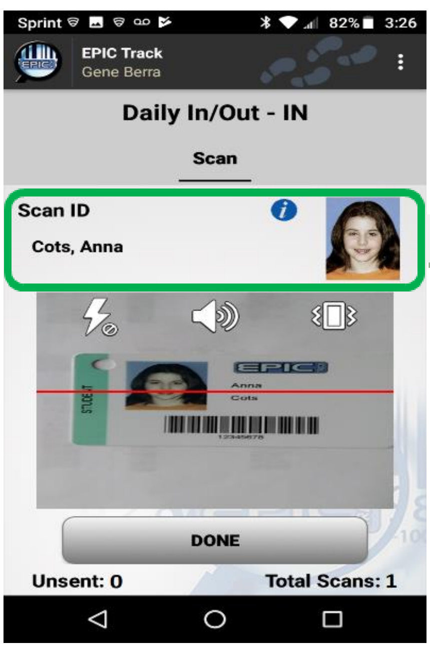


3. Select your event and follow the event steps.



4. Select In or Out.

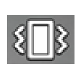
5. Scan ID Card.



Successful scan when name & photo show.

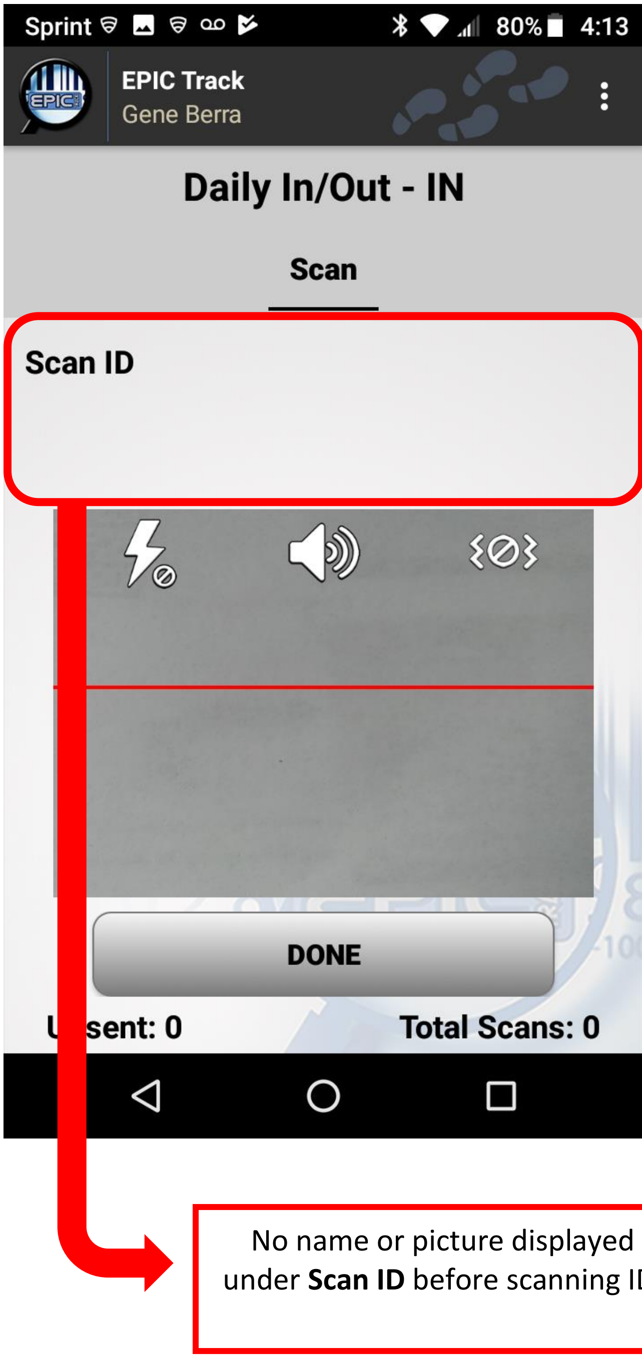
 Enable the flashlight for low light settings.

 Enable beep for audio queue on successful scan.

 Enable vibrate for haptic feedback on successful scan.

Did my ID Scan?

Before Scanning ID



No name or picture displayed under **Scan ID** before scanning ID.

After Scanning ID