

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.

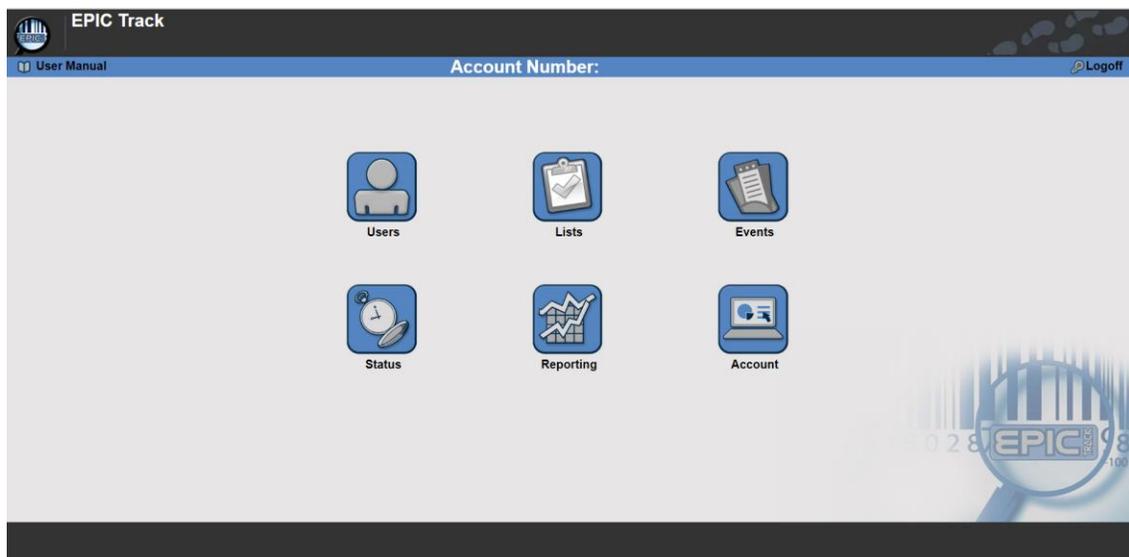
Add/ Manage Users
Add/Manage Lists
Create/Manage Events
View Event Status
Run Reports
View Account Status

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.

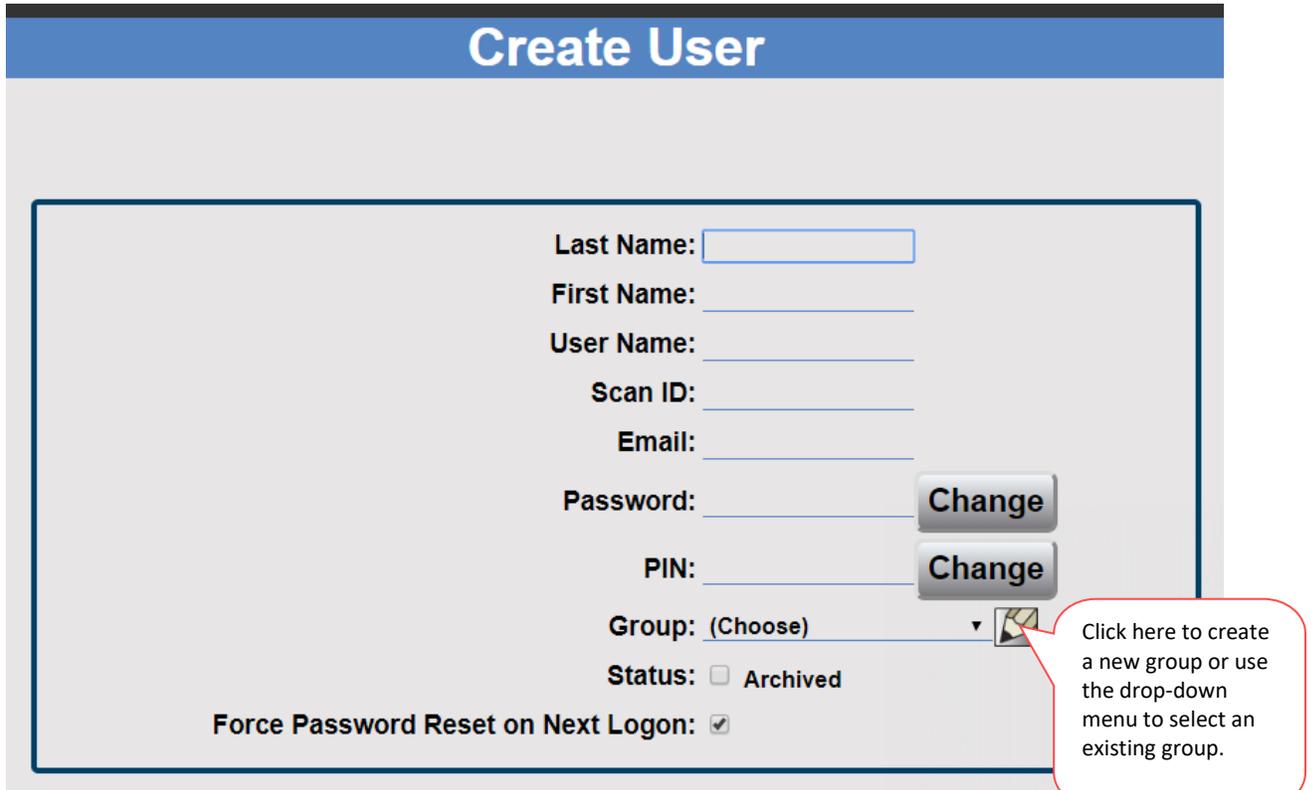
1. After logging into EPIC Track Server, click on the Users icon.
2. To create a new user, click on the New Users button as shown below:

The screenshot shows the EPIC Track interface for managing users. At the top, there is a navigation bar with 'EPIC Track' and 'Users List'. Below this, there are search filters: a 'Search' field with 'Clear' and 'Search' buttons, and a 'Group' dropdown menu set to 'Administrators' with a 'Search' button. A checkbox for 'Show archived users' is also present. Below the filters is a table with the following data:

Full Name	Username	Status	
Berra, Gene	eberra	Active	Edit

At the bottom of the page, there are buttons for 'Back', 'Groups', and 'New User'. The 'New User' button is circled in red.

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



Create User

Last Name:

First Name:

User Name:

Scan ID:

Email:

Password: **Change**

PIN: **Change**

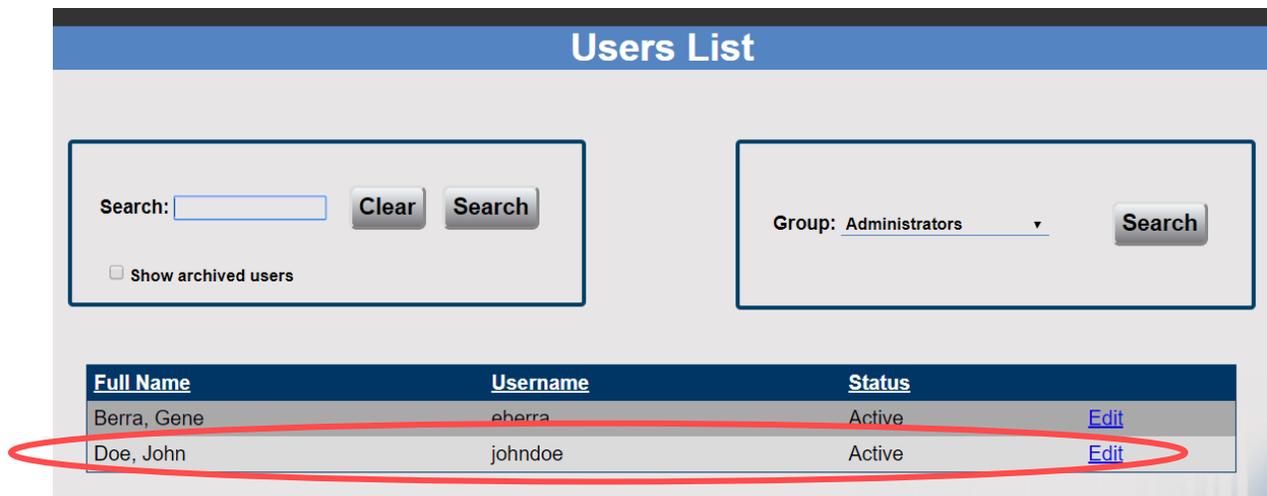
Group: (Choose) 

Status: Archived

Force Password Reset on Next Logon:

Click here to create a new group or use the drop-down menu to select an existing group.

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.



Users List

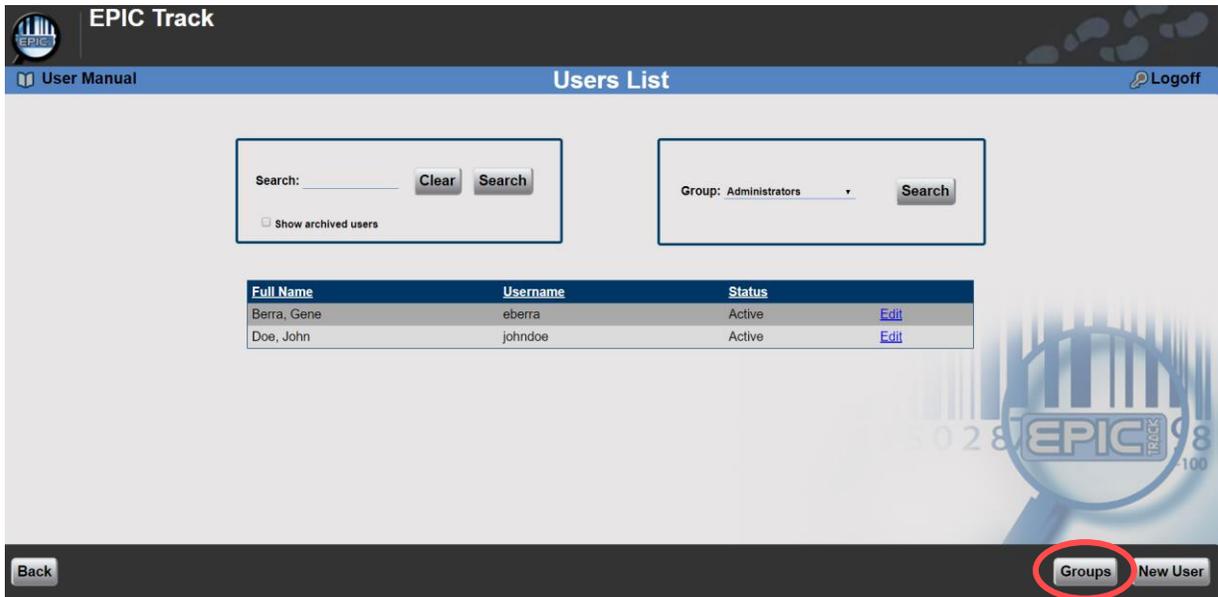
Search: **Clear** **Search**

Show archived users

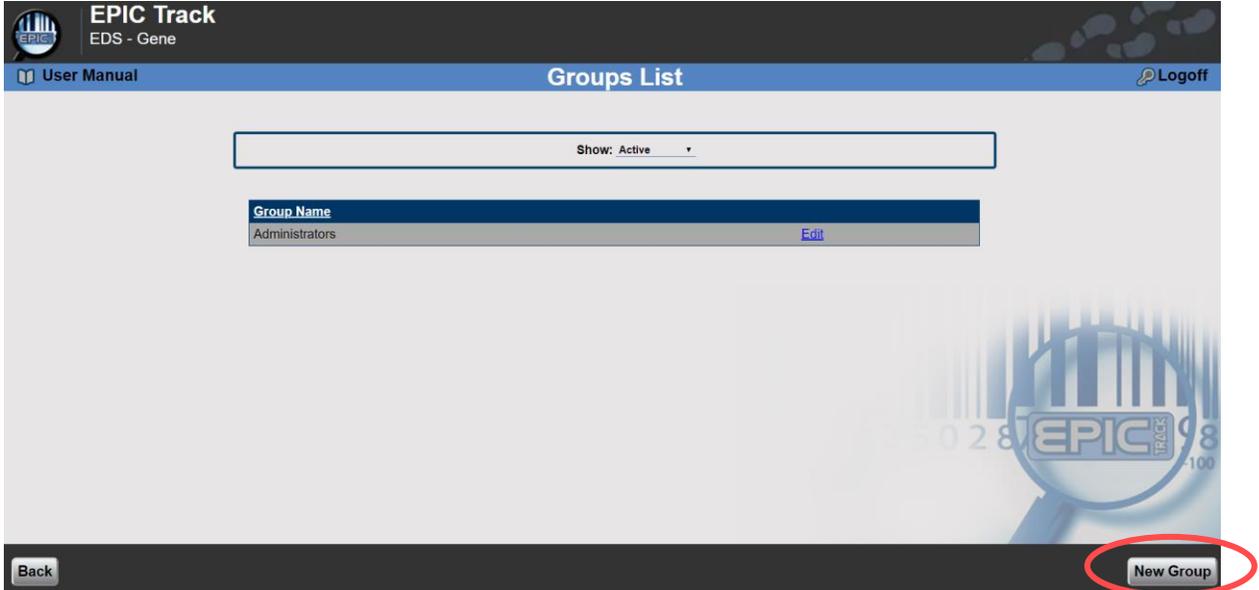
Group: Administrators **Search**

Full Name	Username	Status	
Berra, Gene	eberra	Active	Edit
Doe, John	johndoe	Active	Edit

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



- 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.

Create Group

Group Name: Reporting

Rights:

- Allow adding/editing of users and group rights.
- Allow adding/editing of list and list data.
- Allow adding/editing of events.
- Allow viewing of reports.
- Allow viewing of status screen.
- Allow access to Account page.

Status: Archived

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.

The screenshot displays the EPIC Track Lists management interface. At the top, there is a navigation bar with the EPIC Track logo, a 'User Manual' link, and a 'Logoff' button. The main content area is titled 'Lists' and features a dropdown menu set to 'Show: Active'. Below this is a table of existing lists:

Date	Name	Settings	List Items
03/06/2019	Employees	Settings	List Items
11/30/2018	Sites	Settings	List Items
10/29/2014	Gates	Settings	List Items
10/29/2014	Locations	Settings	List Items
10/29/2014	Responsible Adults	Settings	List Items
10/29/2014	Students	Settings	List Items

At the bottom of the screen, there are three buttons: 'Back', 'New Sub-List', and 'New List'. The 'New List' button is circled in red, indicating the next step in the process.

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.

List Settings

List Name: _____

No sync history available to display.

Personnel List

Archived

Optional Field Labels:

Optional 1: _____

Optional 2: _____

Optional 3: _____

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.

Sub-List Settings

List Name: 8th Graders

Source List: Students ▼

Archived

List Column	Value
Optional 3 ▼	Like ▼ None ▼

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:

List Item Edit

First Name: Frank
Last Name: Scott
Identifier: 84579621
Grade: 7
Homeroom: Keller
Classes: 100 | 101 | 102 | 103
Status: Archived
Delete

Browse Remove Photo

Using the like option:

Sub-List Settings

List Name: 8th Graders
Source List: Students
 Archived

List Column	Value
Classes	100

Like

1 records returned. Settings Saved

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.

Sub-List Settings

List Name: 8th Graders
Source List: Students
 Archived

List Column	Value
Grade	8

Equal

2 records returned. Settings Saved

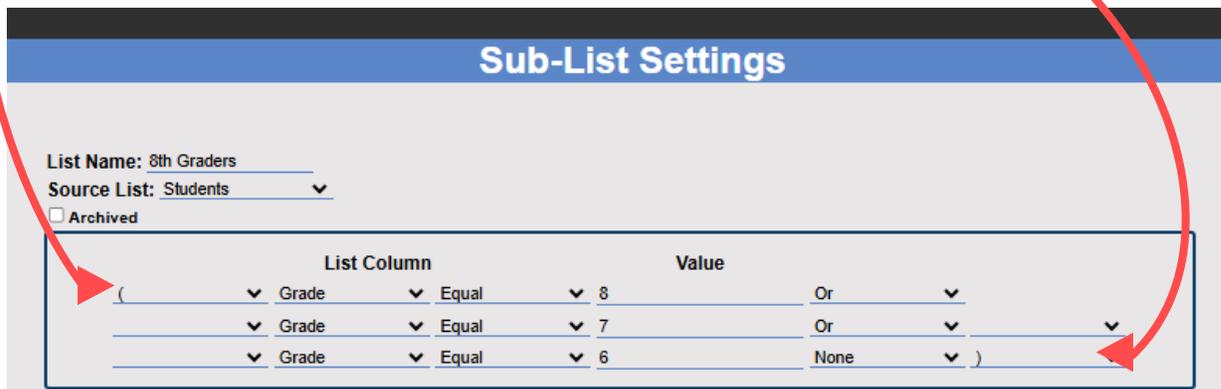
Returns only those records that match the given value.

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.

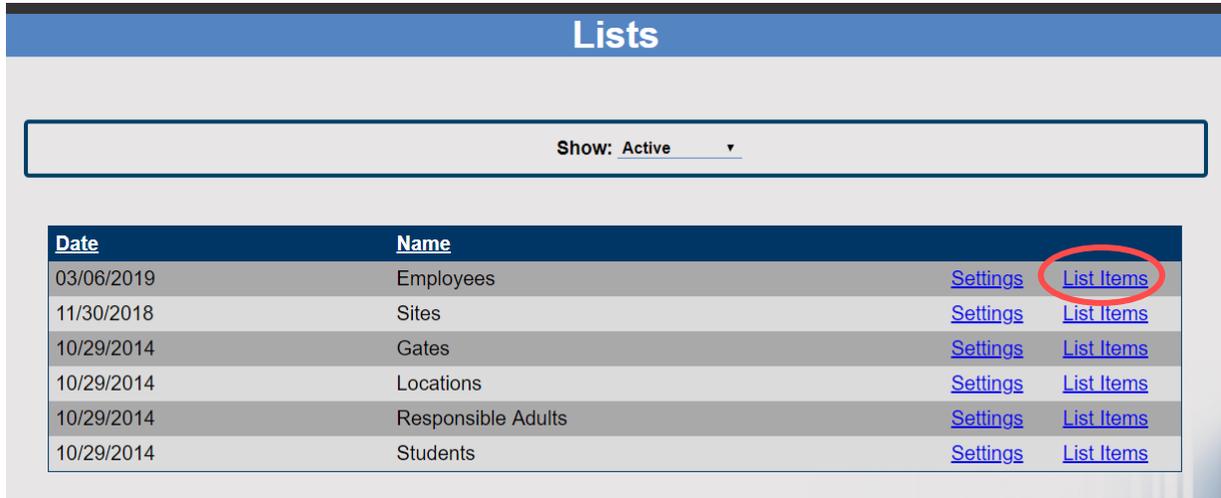


The screenshot shows the 'Sub-List Settings' interface. At the top, there is a blue header with the text 'Sub-List Settings'. Below the header, the 'List Name' is set to '8th Graders' and the 'Source List' is set to 'Students'. There is an unchecked checkbox for 'Archived'. The main part of the interface is a table with two columns: 'List Column' and 'Value'. The table contains three rows of criteria, each starting with a dropdown menu containing a left parenthesis '('. The first row has 'Grade', 'Equal', '8', 'Or', and a dropdown menu. The second row has 'Grade', 'Equal', '7', 'Or', and a dropdown menu. The third row has 'Grade', 'Equal', '6', 'None', and a dropdown menu containing a right parenthesis ')'. Red arrows point from the list items to the corresponding dropdown menus in the screenshot.

List Column	Value
(Grade Equal 8 Or	
(Grade Equal 7 Or	
(Grade Equal 6 None)	

Adding List Items

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

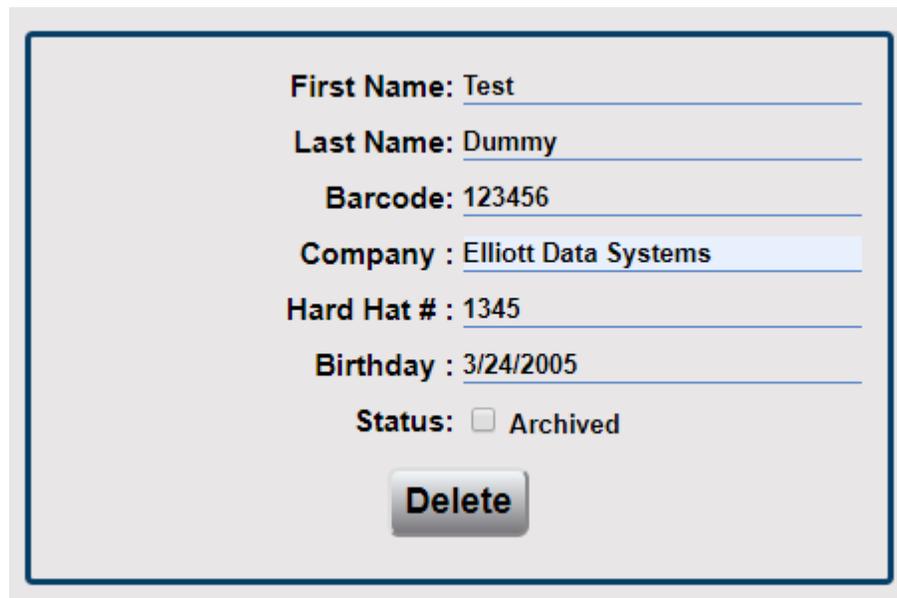


The screenshot shows a web interface titled "Lists". At the top, there is a blue header with the word "Lists" in white. Below the header is a search bar containing the text "Show: Active" and a dropdown arrow. The main content is a table with the following data:

Date	Name	Settings	List Items
03/06/2019	Employees	Settings	List Items
11/30/2018	Sites	Settings	List Items
10/29/2014	Gates	Settings	List Items
10/29/2014	Locations	Settings	List Items
10/29/2014	Responsible Adults	Settings	List Items
10/29/2014	Students	Settings	List Items

In the first row, the "List Items" link is circled in red.

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



The screenshot shows a form for adding a new list item. The fields are as follows:

- First Name:**
- Last Name:**
- Barcode:**
- Company :**
- Hard Hat # :**
- Birthday :**
- Status:** Archived

At the bottom of the form is a **Delete** button.

- 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.

List Item Edit

First Name:

Last Name:

Barcode:

Company :

Hard Hat # :

Birthday :

Status: Archived

Delete



Browse **Upload**

Remove Photo

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

List Edit

Search **Clear** **Search**

Show Archived

<u>Name in List</u>	<u>Barcode</u>	
Doe, Johnathan	1651651	Edit

Events

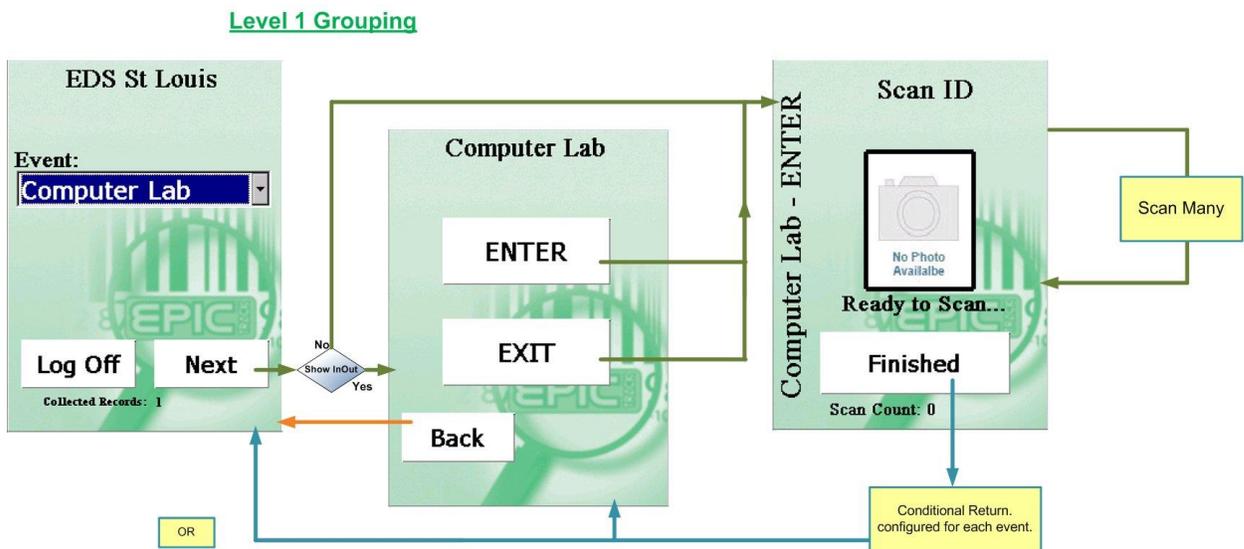
Before going through the steps to create a new event, it is important to have a basic understanding of the logic behind creating events. Events can be configured for almost any tracking scenario. Simple events may only track items from one list, while complex events might track items from several lists 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.

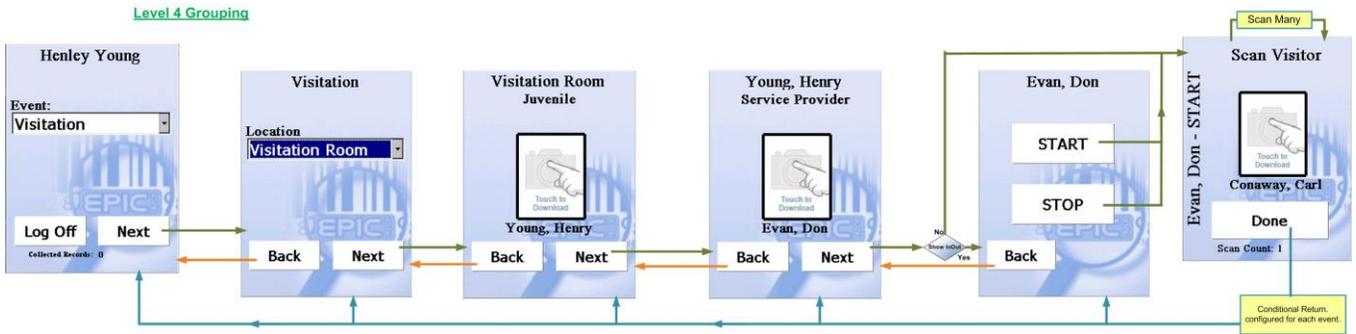
Level 1 Event Example

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.

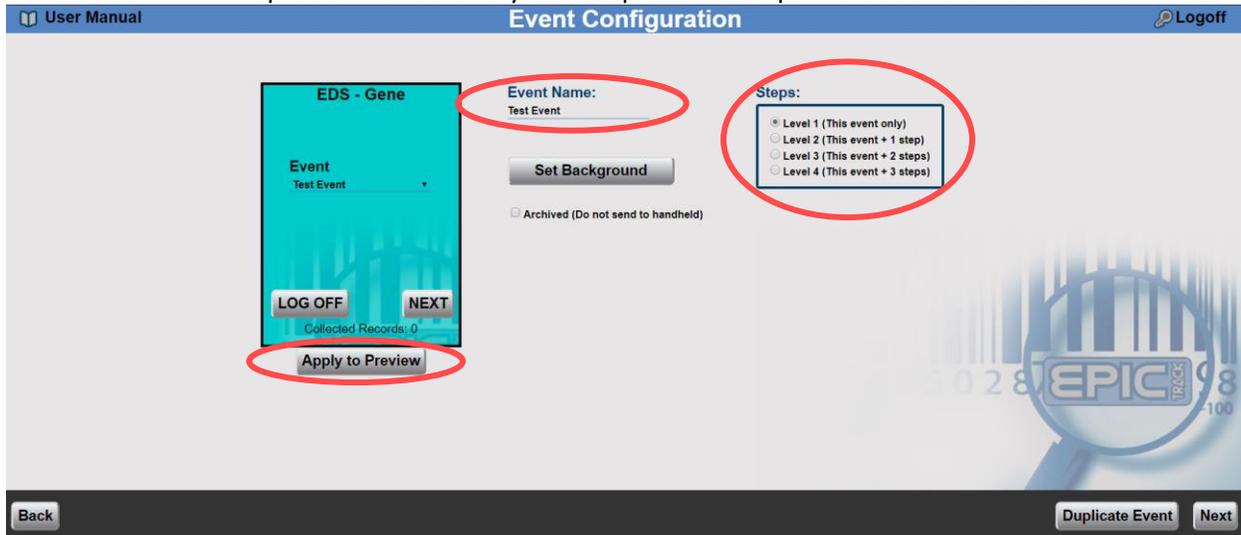
The screenshot shows the EPIC Track Events screen. At the top left is the EPIC Track logo. To its right is the text 'EPIC Track'. Below the logo is a 'User Manual' link. In the center of the top bar is the word 'Events'. To the right of 'Events' is a 'Logoff' button. Below the top bar is a 'Show: Active' dropdown menu. Below the dropdown menu is a table with the following data:

Date	Name	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

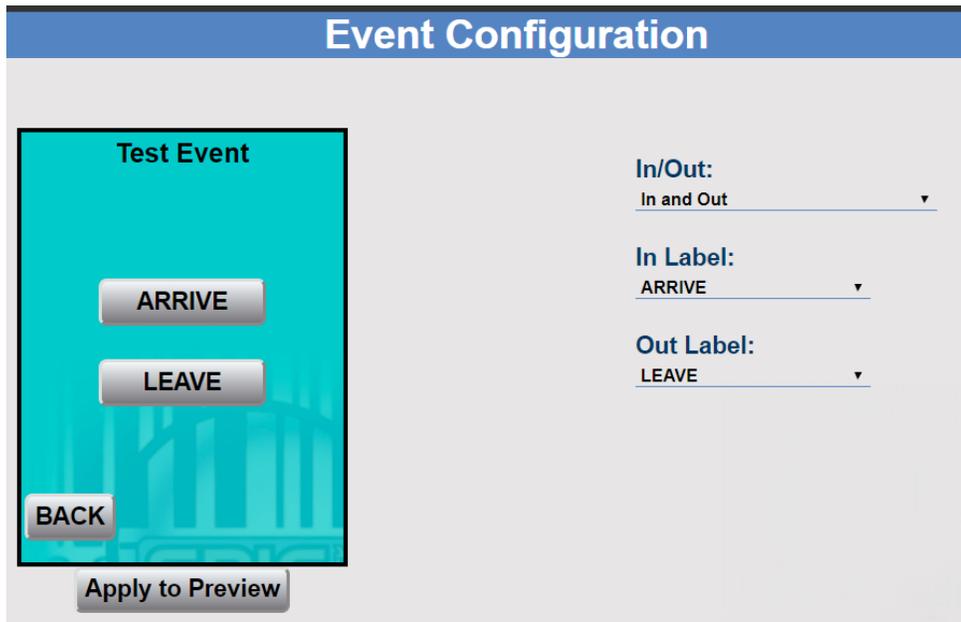
At the bottom of the screen, there is a 'Back' button on the left and a 'New Event' button on the right. A yellow callout bubble points to the 'Log' link for the first event, containing the text: 'Click here to view a log of the Epic Track Connector.'

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.

Event Configuration

Test Event-IN

Scan Company ID

Search

Caller, Ryan

Finished

Scan Count: 0

Apply to Preview

Final Step Label:
Scan Company ID

Final Step:

Select Data: Employee's ▼

Scan Only (hide list)

Completed Button:

Label: Finished

Return To: Event ▼

Event

In - Out

Not in List:
Auto Add (No Warning) ▼

Photos:
Always Show (If Available) ▼

Optional Data:
Never Show ▼

Count Limit:

None ▼

Settings

None

Count Threshold

Count Down

Count Down & Show

Event Count

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.

Events

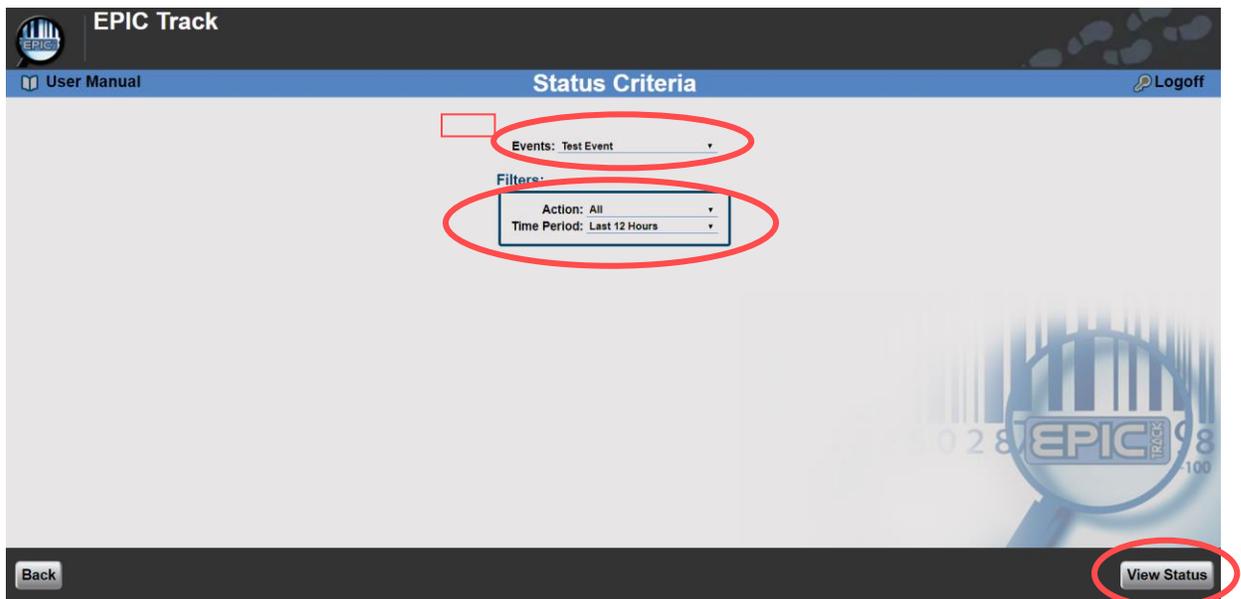
Show: Active ▼

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.

Search:

Click to show photo

Employees	Last Activity	Action	
Dummy, Test	7/29/2019 10:09:35 AM	ARRIVE <input type="checkbox"/>	

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.

Test Event

Search Name From To

Entity Name	Steps	Action	Time	
Dummy, Test		ARRIVE	07/29/19 10:09	Edit

9. Modify the transaction accordingly.

Test Event

Name: Dummy, Test

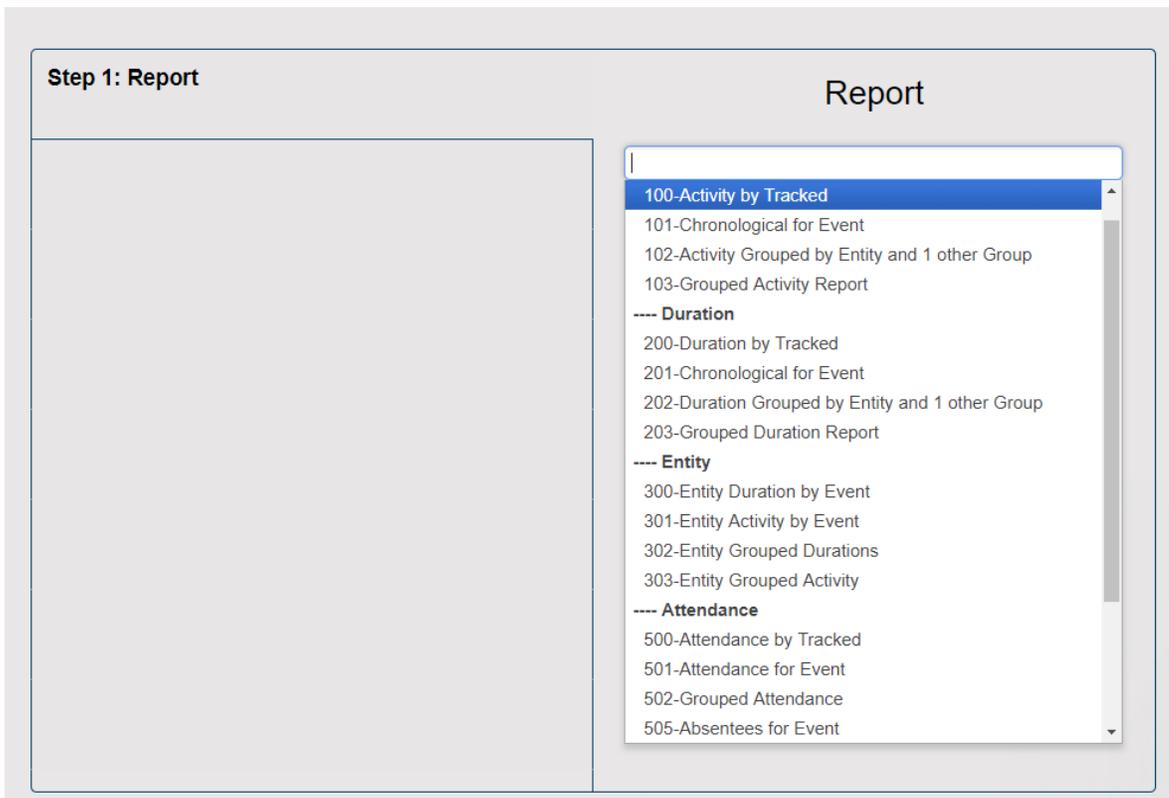
Action: ARRIVE ▼

Scan Time: 07/29/19 10 AM ▼ 09 ▼

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.

The screenshot displays a user interface for selecting a report and an event. It is divided into two main sections: Step 1 and Step 2.

Step 1: Report
This section contains a dropdown menu with the selected option "101-Chronological for Event".

Step 2: Event (1 max)
This section features a "Next" button and a list of event types. The list includes: Bus Tracking (highlighted), Class Trip, Computer Lab, Conference 2018, Daily In/Out, Daycare, Field Trip, and Football Game.

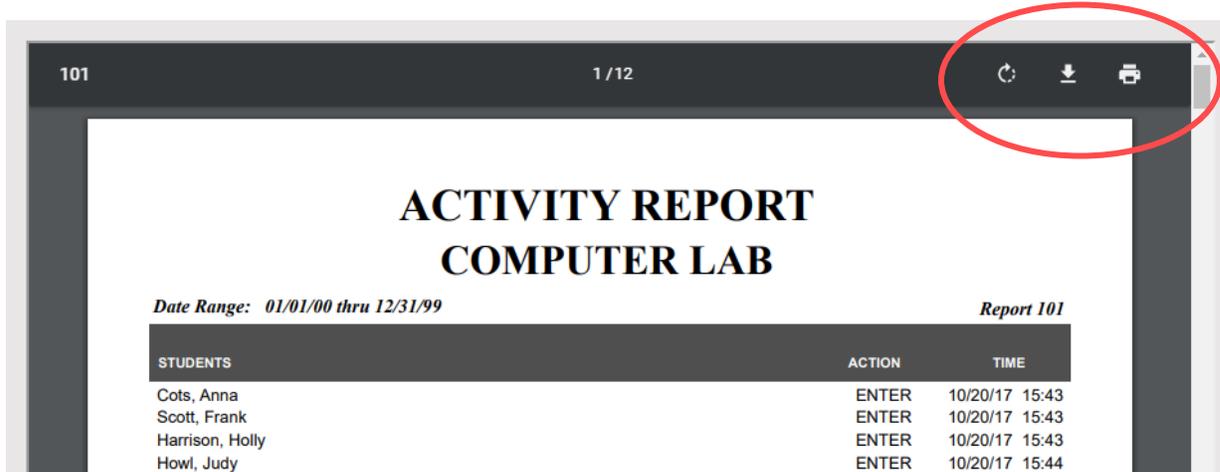
- Now type in the “From” and “To” date that you would like to see on your report, or you can select the check box for a single day or all dates.

The screenshot shows a multi-step report generation interface. On the left, a vertical sidebar contains three steps: 'Step 1: Report' with the value '101-Chronological for Event', 'Step 2: Event (1 max)' with the value 'Computer Lab', and 'Step 3: Date Range' with a 'Next' button. The main area on the right is titled 'Date Range' and contains two input fields labeled 'From:' and 'To:'. Below these fields are two checkboxes: 'Single Day' and 'All Dates'. A red circle highlights the 'Date Range' section.

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

The screenshot shows the same report generation interface, but now at 'Step 4: Report Options'. The sidebar on the left has updated to include 'Step 4: Report Options' and the value for 'Step 3: Date Range' is now 'All Dates'. The main area on the right contains two buttons: 'View Report' and 'Export CSV'. A red circle highlights these two buttons.

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.



101 1 / 12

**ACTIVITY REPORT
COMPUTER LAB**

Date Range: 01/01/00 thru 12/31/99 *Report 101*

STUDENTS	ACTION	TIME
Cots, Anna	ENTER	10/20/17 15:43
Scott, Frank	ENTER	10/20/17 15:43
Harrison, Holly	ENTER	10/20/17 15:43
Howl, Judy	ENTER	10/20/17 15:44

View Account Details

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

The screenshot shows the 'Devices' section of an account. At the top, there is a blue header with the word 'Devices'. Below this is a table with the following columns: 'Device Count', 'Device ID', 'Last User', and 'Date'. The table contains one row with the following data: Device Count: 1, Device ID: c99bf45c-8b1f-4, Last User: Berra, Gene, Date: 07/29/19 10:09. To the right of the date is a blue link labeled 'Release'. Below the table is a 'Usage' section with a bar chart. The chart has two bars: 'Devices' with a value of 1 (out of a limit of 100) and 'Data in List' with a value of 52 (out of a limit of 50,000). The numbers 1 and 52 are highlighted in green circles.

Device Count	Device ID	Last User	Date
1	c99bf45c-8b1f-4	Berra, Gene	07/29/19 10:09 Release

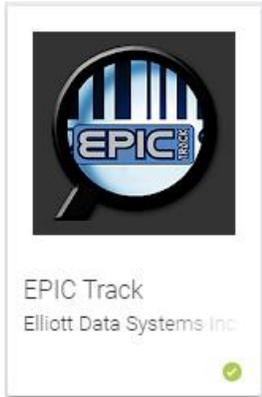
Usage	
2	Devices 0 1 100
3	Data in List 0 52 50,000

1. Registered Devices – will show any devices that are currently registered. Registration happens when logging in to <https://www.epictrackweb.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 additional licenses.
 - b. To free up licenses, click Release next to a registered device which will release 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

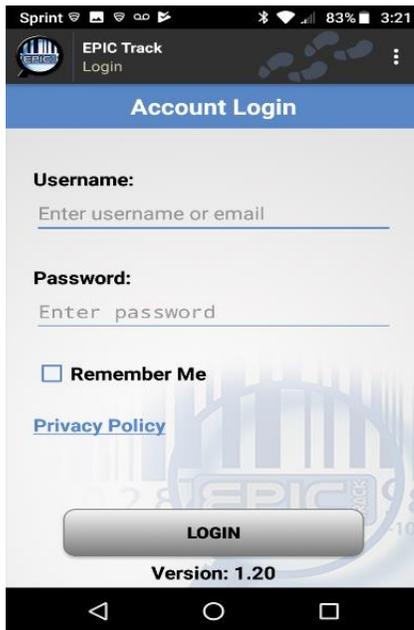


Apple App Store

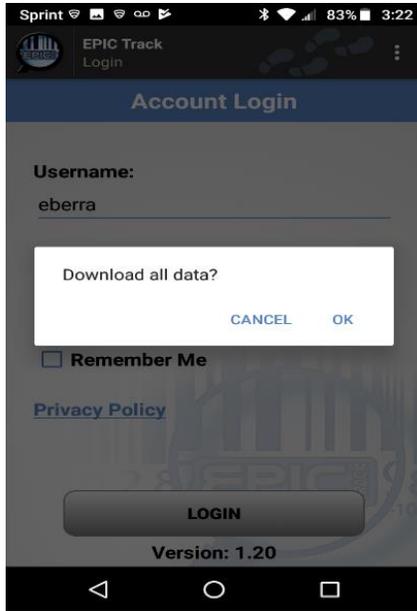


Using the Epic Track App

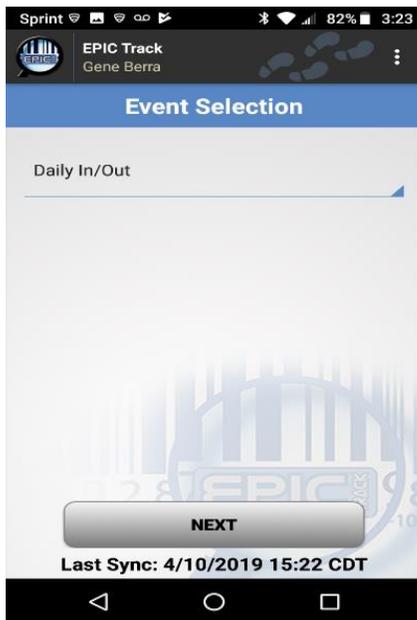
1. Login with supplied credentials.



2. Download all data.



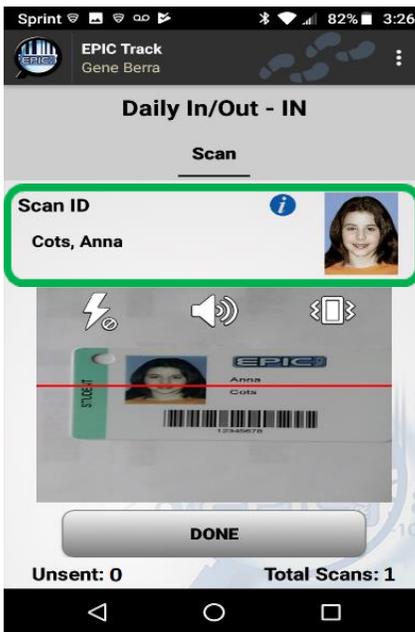
3. Select your event and follow the event steps.



4. Select In or Out.



5. Scan ID Card.



Successful scan when
name & photo show.



Enable the flashlight for low light settings.



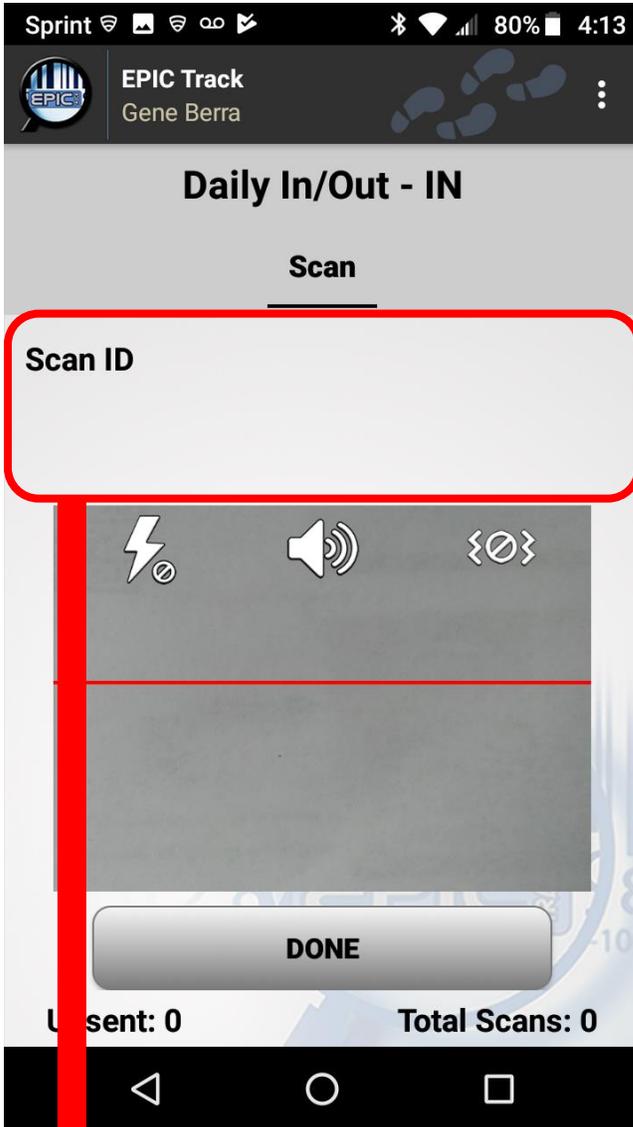
Enable beep for audio queue on successful scan.



Enable vibrate for haptic feedback on successful scan.

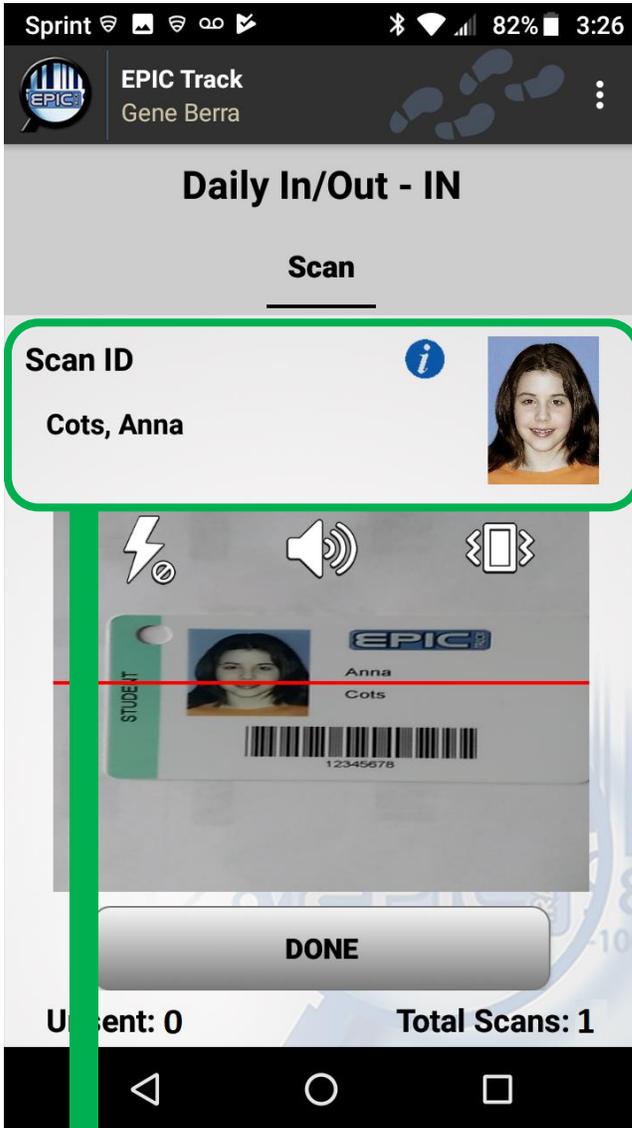
Did my ID Scan?

Before Scanning ID



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

After Scanning ID



Name and picture show after successful ID scan.