



# Configured for Success: Unlocking Automation and Efficiency in Epic

June 2026

Confidential



# Presenter Introduction



**Amanda Recchia**  
Director, Product Management, Applied Systems

# Agenda

1. Accounts
2. Activities
3. Attachments
4. Email Templates
5. Epic Bridge

Epic Configured for Success

# Account



# Home Screen – Sticky Notes



File Edit Areas Locate Actions On Demand Access Links myEpic SMS Help

APPLIED Epic Home Locate Actions On Demand Access Links myEpic Appetite IVANS SMS New Print Refresh Notifications Resource Center 1 Logout

Accounts  
General Ledger  
Dashboards  
Reports/Marketing  
Procedures  
Configure  
Utilities  
Email  
Renewals Manager  
Marketing Automation  
Leads Inbox  
Book Builder

Activities - All Open Activities Customize View Select Columns

Follow Up/Start	Code	Description	Account Name	Who/Owner Name	Who/Owner Code
2/12/2026	AMMK	Added master marketing submission for Blue Sky Trucking	Blue Sky Trucking	Catherine Sherten	SHECA1
2/12/2026	CALL	Call requesting a copy of their policies	Palm Beach Gardens Law Partners	Catherine Sherten	SHECA1
1/7/2026	CALL	Call	Baldwin Art & Photography Studio	Catherine Sherten	SHECA1
2/12/2026	CALL	Call	Shert & Company Manufacturing	Catherine Sherten	SHECA1
2/1/2026	NBCL	New commercial opportunity - Group Medical - Franky & Martha Milldu	Franky & Martha Milldu	Abby Bilderman	ABBEM1
12/20/2025	PAYT	Applied Pay Payment Received	Rose Enterprises	Applied Pay Default W...	@APPAY
1/22/2026	PAYT	Applied Pay Payment Received	2 Dog Restaurant	Applied Pay Default W...	@APPAY

Activity at a Glance

Association **Master Marketing Submission - Trucking**

Attachments **No**

Issuing company

Premium payable

SMS **No**

Service contacts

Activity - Last Note Entered

Entered on \_\_\_\_\_ Entered by \_\_\_\_\_

Report Quick View

- ISA - Income Statement
- ISA - Income Statement - Rolling 12 Months ISA
- ISA - Income Statement - Trailing
- ISA - Income Statement Comparison - Actual to Budget
- Cash Balance Report / Trial Balance Report
- Balance Sheet

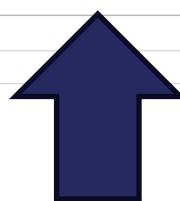
New/Waiting

- General unrouted faxes 0 new items
- Unrouted attachments 0 new items
- Unrouted emails 0 new items
- Unrouted faxes 0 new items
- Unrouted SMS 11 new items

Don't forget to wear a suit tomorrow! Cap is going to be in the office!

Make sure you wish Charles a Happy Birthday on Friday!

1 of 1



You are the only one that can see this!

# Configure - Account



The screenshot shows the 'Configure Home' menu on the left with 'Account' selected. Under 'Account', 'Compliance Indicators' is highlighted. The main content area is titled 'Compliance Indicators' and contains a section for 'FATCA'. Two radio buttons are visible: 'Disable FATCA compliance indicators' (which is selected) and 'Enable FATCA compliance indicators'.



Do you have  
**RED** carriers?

# Configure - Account



File Edit Areas Home Locate Actions On Demand Access Links myEpic SMS

APPLIED Epic Home Locate Actions On Demand Access

Configure Home

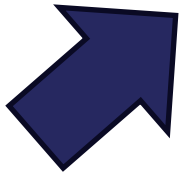
- Account
- Agency Defined Categories
- Auto Capitalization
- Compliance Indicators
- Contact Classifications**
- Contact Descriptions
- Contact Languages
- Accounting

### Contact Classifications

Q

- + Description
- Accounting & Finance
- Benefits**

Contact Demographics	Business	Account	Policy/Line	Premium/Commission	Opportunity
Primary Contacts Only	<input type="checkbox"/>				
Has Primary Email	<input type="checkbox"/>				
Client Portal Account					
Contact Type	Equals	Business			
Name	Contains				
Description	Contains				
City	Equals				
State/Province	Equals				
Zip/Postal Code	Contains				
Preferred Contact Language	Equals				
Email Address	Contains				
Contact Classification	Equals	Benefits			



## Contact Classifications

File Edit Areas Home Locate Actions On Demand Access Links

APPLIED Epic Home Locate Actions On Demand Access

My Reports

- \*Cross-sell - Commer...
- Modify Criteria
- Layouts
- Delivery Options

Account

Activity

Applications

Claim

Client Contracts

General Ledger

Interface

Management

Opportunities

Policy

Transaction

Marketing Preview

### Report Recipients

Acct Type Name

<Current User>

### Email/Fax Detail

Subject

Message

### Marketing Options

- Generate letter
- Send email template
- Add activity
- Add sticky note
- Send SMS
- Preview/Edit results before processing
- Attach copy to account
- Attach copy to account
- Cross-sell employee benefits can
- Green, Normal, Ask them about
- Life Insurance Cross-sell
- Include "Do Not Market"

### Email/Fax Options

From email

Signature

Cover page

Language

### Scheduling

Now

Schedule **10/8/2019 5:30 am**

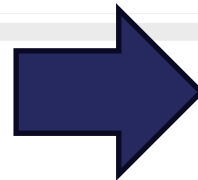
Recurrence **Daily**

### Marketing Distribution Contact

Use primary contact

Use specified contact classification

Benefits



# Configure - Account



File Edit Areas Home Locate Actions On Demand Access Links myEpic SMS Help

**APPLIED**  
Epic

Home Locate Actions On Demand Access Links myEpic IVANS SMS New Print

Configure Home

- Account
  - DNC Subscription Inform...
  - DNC Update Schedule
  - Duplicate Account Check**
  - Employee Benefits
  - Identification Codes
  - Import/Export Contacts
- Accounting
- Activity
- Attachment
- Auditing

## Duplicate Account Check

Entity

Broker

**Client**

Company

Employee

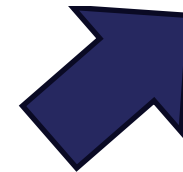
Finance Company

### Detail

Do not perform duplicate account checks  Perform duplicate account checks

### Perform Duplicate Checks By

Account Name  Account name plus ZIP/postal code  Phone number



Duplicate  
Account Check  
By...

Epic Configured for Success

# Activities



# Activity Categories



- Configure – Activity - Categories

**Categories**

Search:  Include Inactive

Description	Status
Accounting Workflows	Active
Benefits Department	Active
Claims Workflows	Active
Commercial Lines Department	Active
Company / Underwriter Workflows	Active
Human Resources Workflows	Active
New Business Workflows	Active
Personal Lines Department	Active
<b>Producer</b>	Active
Referral Source	Active
Renewal Workflows - Priority 1	Active
Renewal Workflows - Priority 2	Active
Renewal Workflows - Priority 3	Active
Sales-Marketing Workflows	Active
Service Center Workflows	Active
Servicing Workflows	Active

16 Items

**Descriptions**

Language: English (United States of America) | Description: Producer

Update matching descriptions in other languages

Language	Description
English (Canada)	Producer
English (United Kingdom)	Producer
<b>English (United States of America)</b>	Producer
French (Canada)	Producer

**Codes Assigned to this Category**

Search:

Code	Description
<b>APPO</b>	Appointment with &AcctName&
CALL	Call
MEET	Meeting
PNOT	Policy Notes

# Activity Categories



- Configure – User Options – Field Defaults – Attachment/Add Activity Workflow – Activity Tab

The screenshot displays the Applied Epic user interface. At the top, a navigation bar includes menu items: File, Edit, Areas, Home, Locate, Actions, On Demand, Access, Links, myEpic, SMS, and Help. Below this is a dark blue header with the Applied Epic logo and icons for Home, Locate, Actions, On Demand, Access, Links, and myEpic. A left-hand sidebar lists various system areas, with 'Attachment' highlighted by a blue arrow. The main content area is titled 'User Field Defaults' and shows 'Employee to edit' as SHECA1. A 'Detail' section contains a list of workflow options, with 'Attachment/Activity Add Workflow' selected and indicated by a blue arrow. This selection opens a modal window titled 'Attachment/Activity Add Workflow'. The modal has two tabs: 'Attachment' and 'Activity', with 'Activity' selected. The 'Add Activity' section contains the following fields:

- Category: Producer (dropdown)
- Code: (dropdown)
- Owner type: (dropdown)
- Specific person: (dropdown)
- Status: Not Started (dropdown)

The 'Add Notes' section contains:

- Access level: Public (dropdown)

# Activity Categories



- Add Activity

File Edit Areas Home Locate Actions Real-Time On Demand Access Links myEpic SMS Help

APPLIED Epic Home Locate Actions

Account Detail  
Benefits Overview  
Contacts  
Opportunities  
Client Contracts  
Quotes  
Tarmika  
Benefits Designer  
Policies  
Proofs of Insurance  
Transactions  
Attachments  
Claims  
Activities  
Add an Activity  
SMS History

Primary Additional

### Add Activity

#### Activity Information

Activity Association \*  
Policy - AUTO - NY - 434110987 [Change Association](#)

Activity Category  
Producer

Activity Code \* Description \*

Code	Description
APPO	Appointment with &AcctName&
CALL	Call
MEET	Meeting
PNOT	Policy Notes

Activity Status:  Open  Closed

Follow Up/Start \*  
MM/DD/YYYY

#### Note

[Go to Full Screen Add](#) Cancel [Save & Go to Detail](#) [Save Activity](#)

# Activities – Outlook Calendar Appointments & Tasks



File Edit Areas Home Locate Actions Real-Time On Demand Access Links myEpic SMS Help

**APPLIED**  
Epic

Home Locate Actions Real-Time On Demand Access Links myEp

- Account Detail
- Benefits Overview
- Contacts
- Opportunities
- Client Contracts
- Quotes
- Tarmika
- Benefits Designer
- Policies
- Proofs of Insurance
- Transactions
- Attachments
- Claims
- Activities**
- Add an Activity
- SMS History

**Activity Code \***  
APPO

**Description \***  
Appointment with Jason & Jackie Myers

**Priority**  
Urgent

**Owner Name \***  
Catherine Sherten

**Status**

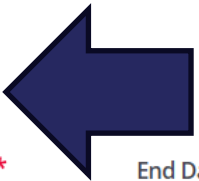
**Activity Status**  
 Open  Closed

**Follow Up**

**Update**  
Update Email Calendar

**Start Date \*** 02/26/2026 **Start Time \*** 8:00 am **End Date \*** 02/26/2026 **End Time \*** 9:00 AM

**Reminder Date** MM/DD/YYYY **Reminder Time**



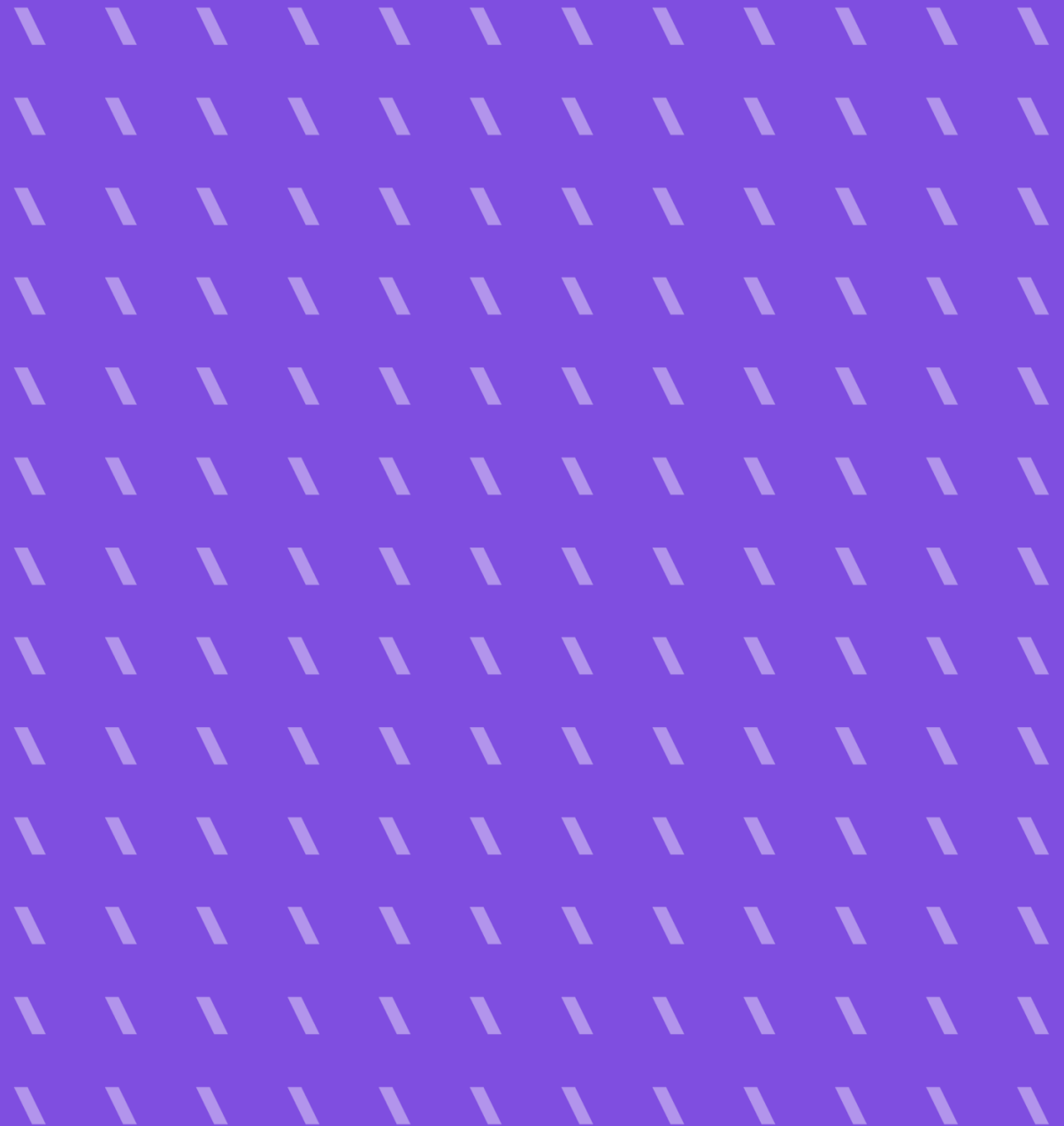


# Activity Codes – Under the Hood

- Hidden (code) vs. Background (event)
- Owner – Specific Person, Role or Workgroup
- Further Actions:
  - > Generate a Letter or Email
    - Email is generated by a template and can be the body of the email or the attachment or both
  - > Generate an SMS
  - > Generate ANOTHER Activity
  - > Close – as Unsuccessful or Auto-Close by the Download
- Tasks
  - > Tasks can all populate at once or they can populate as follows:
    - # of Days After/Before Activity Entered On or Activity Follow Up/Start Date
    - Or # of Days After/Before Previous Task Due Date or Previous Task Start Date

Epic Configured for Success

# Attachments



# Attachments



- Default Attachment Folders – User Options – Field Defaults

The screenshot displays the Applied Epic software interface. The main window is titled 'User Field Defaults' and shows configuration for employee Catherine Sherten (Employee ID: SHECA1). A modal dialog box, 'Attachment/Activity Add Workflow', is open. The dialog has two tabs: 'Attachment' (selected) and 'Activity'. Under the 'Attachment' tab, there are radio buttons for 'Acquire and attach image', 'Document' (selected), 'Existing file', and 'eForm'. Below this is a 'Document' section with a 'Template folder' dropdown menu. The 'Detail' section includes 'Attach to' dropdown, 'Folder path' (set to '\\Commercial Lines\'), 'Security access' (set to 'Public'), and 'Client accessible' checkbox. 'Finish' and 'Cancel' buttons are at the bottom right. A large blue arrow points to the right side of the dialog.

# Attachments



- System Generated Attachments

File Edit Areas Home Locate Actions On Demand Access Links myEpic SMS Help

**APPLIED**  
Epic

Home Locate Actions On Demand Access Links myEpic IVANS SMS New Print

Max Search for an

Configure Home  
Account  
Accounting  
Activity  
**Attachment**  
Access Levels  
Attachment Folders  
Monitor Emails  
Scanned Documents  
System Generated Attach...  
Custom Settings  
Auditing  
Email  
Interface  
International  
Job Management  
Leads Inbox  
Links

### System Generated Attachments

Q

	System Event	↑	Attachment
	Issue Certificate		Certificate of Insurance
	Issue Evidence of Insurance		Evidence of Property
	Issue Loss Notice		Loss Notice
	Issue Motor Vehicle Liability Insurance Cards		Motor Vehicle Liability Insurance Card
	Policy Checking Results		Policy Checking Results
	Print Cancellation		Cancellation Request
	<b>Print Checks</b>		<b>Check</b>
	Print Deposit Slip		Deposit Slip
	Renew Policy		Bulk Renew Log

### Detail

System Event  
Print Checks

Attachment  
Check

Applies to  
Broker, Client, Company, Employee, Finance Company, Other Interest, Vendor

### Attachment Folders

Path  
\\Accounting\Checks\

# Attachments



- System Generated Attachments

The screenshot shows the Applied Epic web interface. On the left is a navigation menu with 'Attachment' selected. The main area displays a list of system-generated attachments, with 'Issue Certificate' highlighted. To the right, the configuration page for 'Certificate of Insurance' is visible, showing settings for 'Attachment Folders' and 'Security & Retention'. A large blue arrow points to the 'Expires after' field in the 'Client Access' section, which is set to 30 days.

Attachment Name	Attachment Type
Generate Updated Invoice	Invoice
Import Direct Bill Transactions	Log
Import Receipts	Log
Import Reconciliations	Log
Issue Auto ID Card	Auto ID Card
Issue Binder	Binder
<b>Issue Certificate</b>	<b>Certificate of Insurance</b>
Issue Evidence of Insurance	Evidence of Property
Issue Loss Notice	Loss Notice
Issue Motor Vehicle Liability Insurance Cards	Motor Vehicle Liability Insurance Card
Policy Checking Results	Policy Checking Results
Print Cancellation	Cancellation Request

41 Items

**Certificate of Insurance**

Applies to  
Client

**Attachment Folders**

Path  
\\Commercial Lines\Proofs\Certificates\

**Security & Retention**

Access  
Public

Expires after  
 Do not purge

**Client Access**

Client accessible Expires after 30 Days

# Attachments



- Send via Email converts Word to PDF

File Edit Areas Home Locate Actions On Demand Access Links myEpic SMS Help

**APPLIED**  
Epic

Home Locate Actions On Demand Access Links myEpic IVANS SMS New Print

Max

Configure Home  
Account  
Accounting  
Activity  
**Attachment**  
Monitor Emails  
Scanned Documents  
System Generated Attach...  
System Settings  
Templates  
Template Folders

### System Settings

Setting	Selection
Access Policy Attachments Behavior	Show all documents attached to the polic...
Client Access	Client access checkbox is displayed
<b>Document Email Format</b>	<b>Send as PDF</b>
Important Policy Documents Defaults	Always default the "Mark as an Important...
Unrouted Attachment Activity Event	Add Attachment

### Document Format When Sending Via Email

Send as PDF  Send in original format

# Attachments



- Naming Downloaded eDoc Attachments by Agency, Branch, Dept, Profit Center

The screenshot displays the Applied Epic software interface. The top navigation bar includes menus for File, Edit, Areas, Home, Locate, Actions, On Demand, Access, Links, myEpic, SMS, and Help. The main content area is titled "Interface Setup - All" and contains a table of Lookup Codes and Account Names. Below this, the "eDocs & Messages Download" section is active, showing options to accept eDocs and messages, and a default who/owner selection for Kara Harrison. The "eDocs and Attachments" section features a search bar and a table of attachments with columns for Code, Agency, Branch, Dept, Prft Cntr, Description, Accept, Activity Code, and Activity Status. An "Attachment Custom Description" dialog box is open, showing a list of descriptions for various languages. A blue arrow points to the "Description" field in the dialog, which contains the text: "Endorsement eff: &ServSumEffDate& on &LineDesc& Policy #: &Pr".

Lookup Code	Account Name	Type
21SCE1	21st Century Insurance	Issuing/Billing Company
ACEIN1	Ace Insurance	Issuing/Billing Company
ACUIN1	Acuty Insurance	Issuing/Billing Company
AETNA1	Aetna Life & Casualty	Issuing/Billing Company
AIG001	AIG	Issuing/Billing Company
ALEXINS-01	Alexandria Prudhomme Insurance	Broker

Code	Agency	Branch	Dept	Prft Cntr	Description	Accept	Activity Code	Activity Status
SYR	<ALL>	<ALL>	<ALL>	<ALL>	Synchronization Request	Accept		Default
TRA	<ALL>	<ALL>	<ALL>	<ALL>	Transfer All (screens and edits)	Accept	RTAL	Default
TRE	<ALL>	<ALL>	<ALL>	<ALL>	Transfer Edits	Accept	RTAL	Default
TRS	<ALL>	<ALL>	<ALL>	<ALL>	Transfer Screens	Accept	RTAL	Default
VIEW	<ALL>	<ALL>	<ALL>	<ALL>	Real-Time Inquiry Performed	Accept	RTAL	Default
XLC	<ALL>	<ALL>	<ALL>	<ALL>	Cancellation Confirmation	Accept	RTAL	Default
XLN	<ALL>	<ALL>	<ALL>	<ALL>	Cancellation Request	Accept	RTAL	Default
XLP	<ALL>	<ALL>	<ALL>	<ALL>	Cancellation Pending	Accept	RTAL	Default
BPR	ISA	ATL	BN	BN-L	Benefit Proposal Information	Accept	PNOT	Default
PCH	<ALL>	<ALL>	<ALL>	<ALL>	Policy Change	Accept	EDEN	Default

Language	Description
English (United States of America)	Endorsement eff: &ServSumEffDate& on &LineDesc& Policy #: &Pr
English (Canada)	Endorsement eff: &ServSumEffDate& on &LineDesc& ...
English (United Kingdom)	Endorsement eff: &ServSumEffDate& on &LineDesc& ...
English (United States of America)	Endorsement eff: &ServSumEffDate& on &LineDesc& ...
French (Canada)	Endorsement eff: &ServSumEffDate& on &LineDesc& ...

Epic Configured for Success

# Email Templates



# Attachments



## ■ Creating Email Templates

The screenshot displays the 'Email Templates' configuration page in the Applied Epic system. The interface includes a top navigation bar with the Applied Epic logo and various utility icons. A left-hand navigation menu lists various system areas, with 'Email Templates' highlighted and a blue arrow pointing to it. The main content area is divided into several sections:

- Email Templates Table:** A table listing existing templates with columns for 'Description' and 'Status'. The 'Renewal Premium Increase' template is selected.
- Descriptions:** A section for configuring the template's descriptions, including a language dropdown (set to 'English (United States of America)') and a description text box containing 'Renewal Premium Increase'. A checkbox for 'Update matching descriptions in other languages' is checked.
- Language/Description Table:** A table showing the template's descriptions for different languages: English (United Kingdom), English (United States of America), and French (Canada), all with the description 'Renewal Premium Increase'.
- Template Details / Attachment Settings:** A section for configuring the template's body and subject. The 'Subject' is set to 'Renewal Premium Review'. A 'Pull user's email signature' checkbox is present.
- Template Body:** A rich text editor containing the following text:

{Contact Name},

We are in receipt of your renewal for {Policy Description}, with an expiration date of {Policy Expiration Date}. We are reviewing this policy and will be contacting your soon.

If you have any questions, please reach out to our office.
- Field Selection List:** A list of fields available for insertion into the template body, including 'A/R Due Date', 'Account Name', 'Agency Name', 'Balance Due', 'Branch Name', 'Cancellation Date', 'Claim Description', 'Company Claim Number', 'Contact Formal Name', 'Contact Informal Name', 'Contact Name', 'CPA Card Number', 'Date of Loss', and 'Invoice Amount'.

# Attachments



## ■ Creating Email Templates

File Edit Areas Home Locate Actions On Demand Access Links myEpic SMS Help

**APPLIED**  
Epic

Home Locate Actions On Demand Access Links myEpic IVANS SMS New Print

Configure Home  
Account  
Accounting  
Activity  
Attachment  
Auditing  
**Email**  
System Settings  
Branding Profiles  
Email Events  
Email Templates  
Applied Pay Email  
Interface  
International  
Job Management  
Leads Inbox

### Email Templates

Description	Status
Auto ID Card Sent to Insur...	Active
Benefits Commission Disc...	Active
Bind order to Carrier	Active
Binding Instructions - Bro...	Active
Cancellation for Non-pay...	Active
Certificate - New	Active
Certificate - Renewal	Active
Change Request Confirm...	Active
Change Request to Carrier	Active
Collections -Outstanding ...	Active
Invoice	Active
Receipt for Payment	Active
Renewal Premium Increase	Active
Renewal with Indio & App...	Active
Submission to Carrier	Active
Summarized Quote to Cli...	Active

### Descriptions

Language: English (United States of America) ▼  
Description: **Renewal Premium Increase**  
 Update matching descriptions in other languages

Language	Description
English (United Kingdom)	Renewal Premium Increase
English (United States of America)	Renewal Premium Increase
French (Canada)	Renewal Premium Increase

Template Details | Attachment Settings

### Attachment Defaults

Folder path: \Commercial Lines\  
Security access: Public  
 Mark as an Important Policy Document  
 Do not purge Expires after [ ] days  
 Client accessible Expires after [ ] days

# Attachments



- Default Templates for Email Events

File Edit Areas Home Locate Actions On Demand Access Links myEpic SMS Help

**APPLIED**  
Epic

Home Locate Actions On Demand Access Links myEpic IVANS SMS New Print

Configure Home  
Account  
Accounting  
Activity  
Attachment  
Auditing  
**Email**  
System Settings  
Branding Profiles  
Email Events  
Email Templates  
Applied Pay Email  
Interface  
International

### Email Events

Q

Event	↑	Status
Agent/Broker Record of Change		All
Custom Form Export		All
Distribute Attachment		All
Distribute File		All
Export Holders		All
Issue Auto ID Cards		Selected

### Email Templates

Templates available for this event:

All  Selected

+ Template Name

x Auto ID Card Sent to Insured

Print

Epic Configured for Success

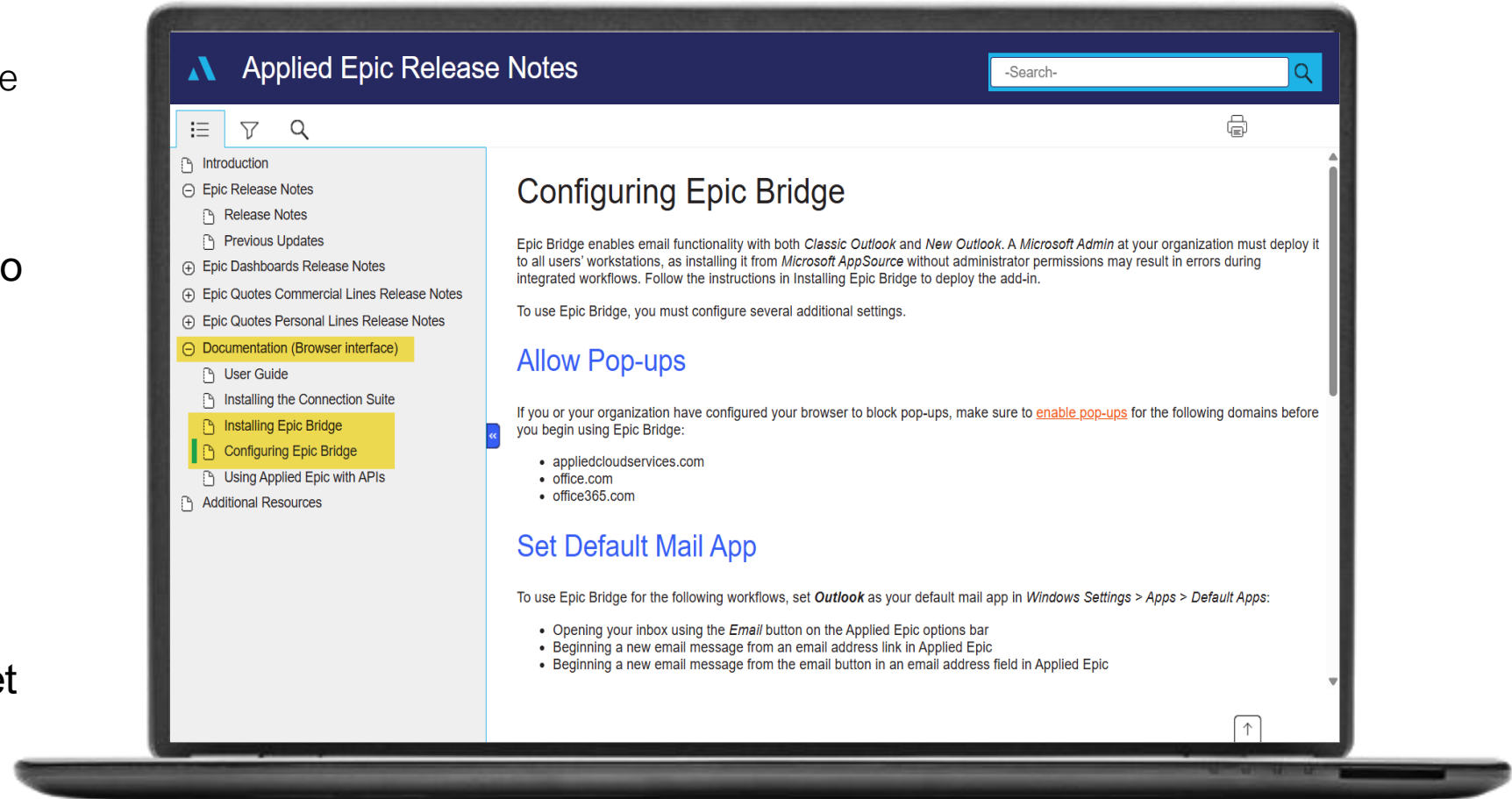
# Epic Bridge





# Install and Prerequisites

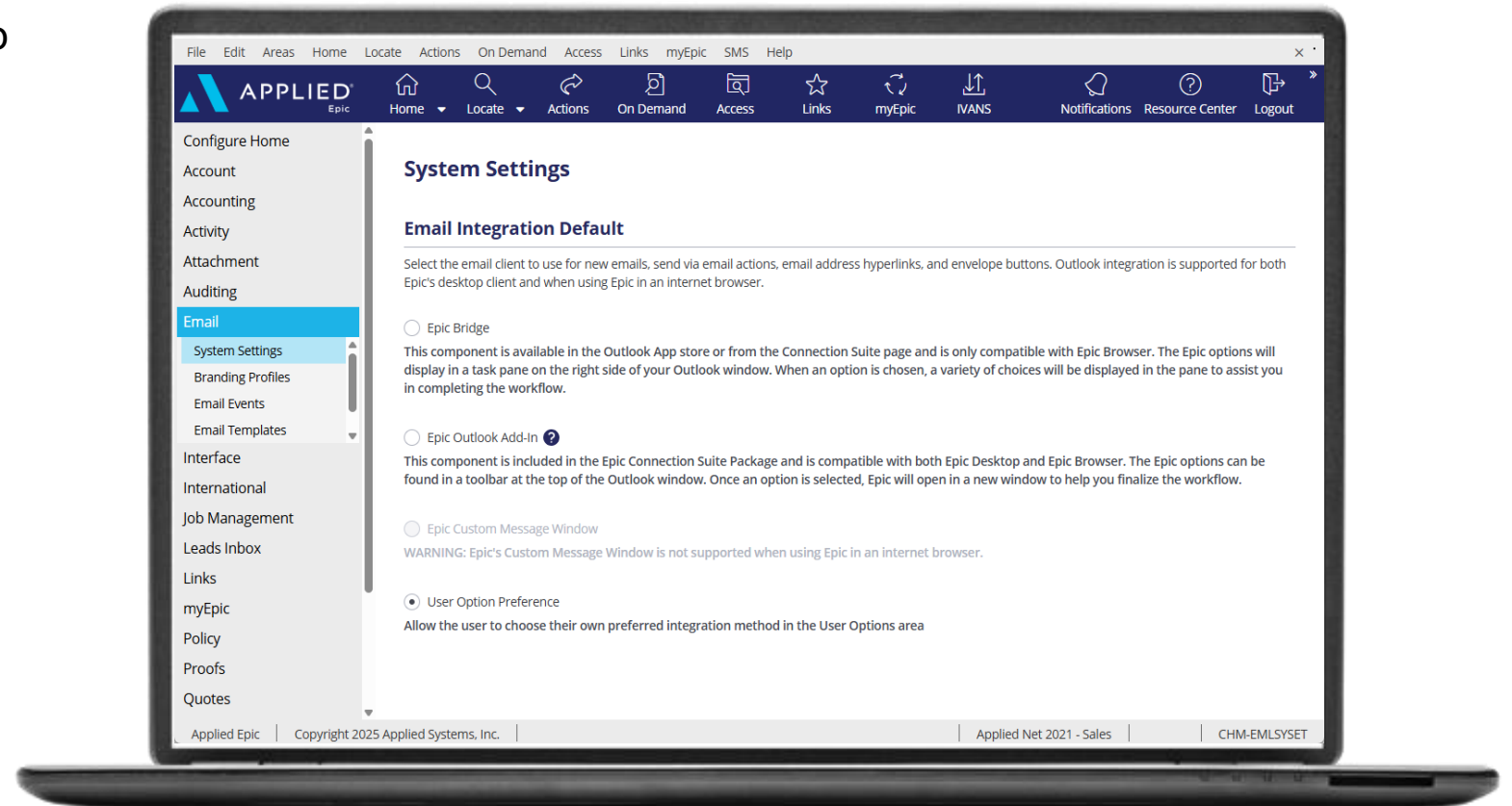
- Install by Microsoft Admin
  - > Not part of Connection Suite Package
  - > Auto-updates after install
- Additional domains to add to pop-up blocker
  - > appliedcloudservices.com
  - > office.com
  - > office365.com
  - > cloud.Microsoft
  - > outlook.cloud.microsoft
- Default Mail apps can be set to add support for New Outlook or Outlook on the web





# Configuration

- **System and User Email settings set to Epic Bridge**
  - > Controls workflows that start in Epic, primarily for New Outlook support
- **Epic Security Permissions are used by Bridge**
  - > No new security permission
  - > Access to accounts, attachments, activity, etc. all look at existing permissions
  - > Existing Email Summarization permission is checked
- **User Defaults are respected**
  - > Attachment Defaults
  - > Activity Defaults
  - > Region & Language





# Activity System Event

- Epic Bridge Email Attached
  - > @OUT code by default
- Can only be background or off
  - > Will not display or be editable in Epic Bridge
- Customize default options like closing by default by configuring with your own custom code
  - > Be sure to mark it as default on the System event

**System Events**

Q Bridge

Description

Epic Bridge Email Attached

**Detail**

Generate activity for event automatically

Required

Not required

Background

Activity code	Description	Default
OUT	Epic Bridge Email Attached	Yes

Search Results: 1 of 202

1 Items

Default

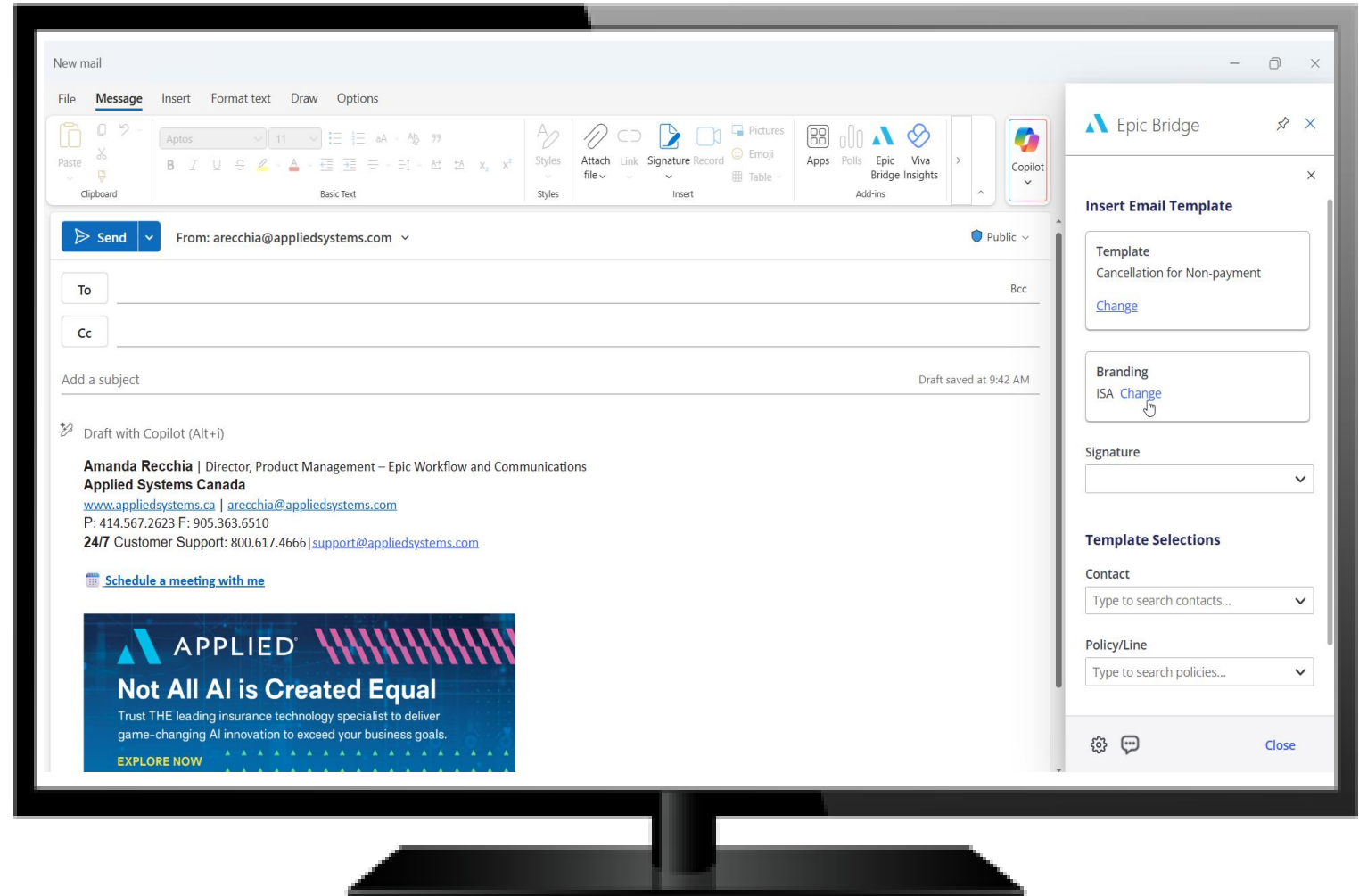
Cancel Save

Applied Epic | Copyright 2025 Applied Systems, Inc. | Applied Net 2021 - Sales | CHM-ACTEVENT



# Email Templates

- Any configured template in Epic is available within Bridge
- One or more can be used when writing a new email or replying to an existing email
- Can use email signature from Epic, or choose to keep your signature from Outlook



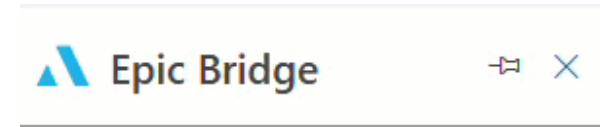


# Best Practices



## Pin Epic Bridge for Easy Access

- > Always pin Epic Bridge in both Inbox and Compose modes to keep it visible while reading or drafting emails.
- > This ensures smooth workflows, especially when initiating tasks from Epic.



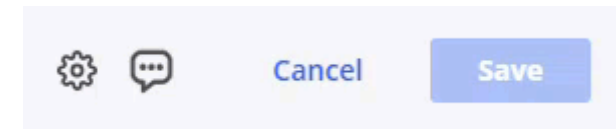
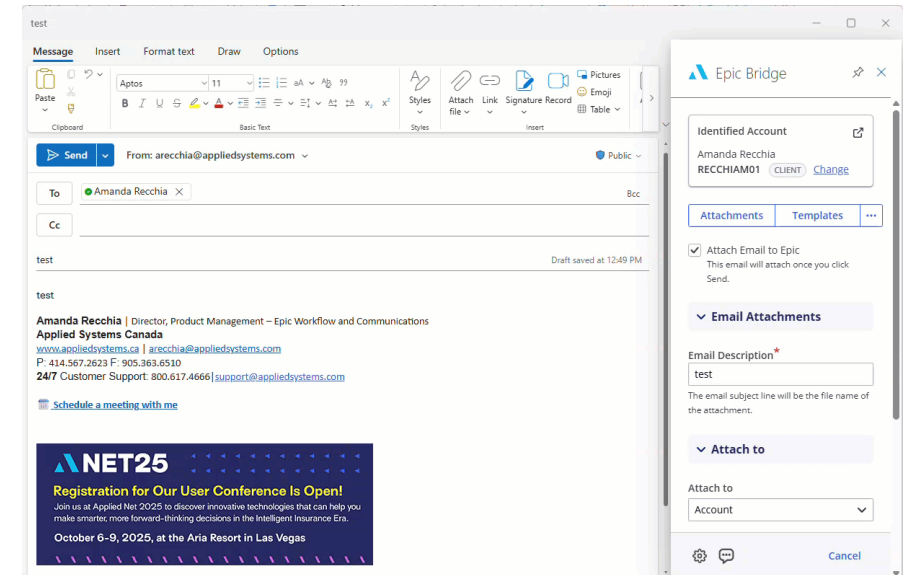
## Attach After Sending Pop-up

- > Do not close the pop-up window that appears after sending an email with an Epic attachment.
- > This window allows Outlook to download a copy and send it to Epic—it will close automatically once complete.



## Built-in Defaults

- > Consider enabling these Epic Bridge-specific settings:
  - Attach Email to Epic
  - Delete Email(s) After Attaching
  - Add Attachments to Epic Separately





## Additional Resources

- Epic Bridge Webinar on Demand –
  - > <https://www1.appliedsystems.com/en-us/resources/webinars-on-demand/epic-bridge-the-new-outlook-add-in/>
  
- Applied University
  - > [https://community.appliedsystems.com/AppliedUniversity/s/learning-plan-detail-standard?ltui\\_urlRecordId=a7UPI000000SYBdMAO&ltui\\_urlRedirect=learning-plan-detail-standard](https://community.appliedsystems.com/AppliedUniversity/s/learning-plan-detail-standard?ltui_urlRecordId=a7UPI000000SYBdMAO&ltui_urlRedirect=learning-plan-detail-standard)
  
- Epic Release Notes
  - > Full note with November Release
  - > Documentation section has install and configuration
  
- Epic Help File
  - > Email section in navigation