

EPIC for Windows v4.x to v5.x Upgrade Instructions

Introduction

If you are currently using a version of EPIC that is prior to 5.00 then the software has been updated and you should download and install the new version of EPIC. The new version of EPIC provides access to new data sets and new features to help you get the most out of your existing data.

The following instructions provide a guide to downloading and upgrading EPIC for Windows from version 4.x to version 5.x.

Support

Ford Equity Research has a dedicated Technical Support department that is able to help you with any technical issues that may arise when installing or using our products. The Technical Support department can be contacted by using one of the following methods:

Telephone: (800) 842-0207

Email: techsupport@fordequity.com

Single Station Upgrade

Note EPIC Directory Locations

EPIC can be customized to have user files in alternate locations. So that these user files are not lost during the upgrade process it is important to correctly identify their locations.

1. Click on **Start, All Programs, Ford Investor Services, EPIC for Windows** to start the application.
2. In EPIC click on **Options, User Directory**. Make a note of the directories for *Location for User Files* and *Location for Spare Variable Database* then click **OK** to close.
3. In EPIC click on **Options, Database Update**. Make a note of the directory for *Location for Database* then click **OK** to close.
4. Close EPIC.

Installing the Software

The latest version of EPIC is available for download from the Ford Update web site. Before installing the latest version of EPIC please verify with Ford Equity Research Technical Support that a security profile has been activated for you.

EPIC Download URL: <http://www.fordupdate.com/epic.htm>

1. In Internet Explorer navigate to the link above.

2. Click on the **EPIC for Windows Program** (Version 5.00) link to download the software.
3. Enter your Ford user name and password.
4. If you get a *File Download – Security Warning* prompting to run or save the file, choose **Run**.
5. If you get a *File Download – Security Warning* stating that the publisher could not be verified, choose **Run**.
6. You will be presented with the *EPIC for Windows Setup Program*. Click **Next** to start the installation.
7. You will be prompted to select an installation folder. C:\EPICWIN is the default. Click **Next**.
8. Click **Install** to start the installation. When the installation is complete click **Finish**.

Upgrading Epic

Once the new version of EPIC is installed the settings and user files need to be transferred from the previous version of EPIC.

1. Click on **Start, All Programs, Ford Investor Services, EPIC 4 to 5 Upgrade** to start the upgrade application.
2. The default location for your EPIC installation will be displayed as *C:\epicwin*. If your EPIC installation is located somewhere else use the **Browse** button to select the location. Click **Next**.
3. The locations of the files for EPIC version 4 will be displayed. Confirm that these locations are correct by referring to the notes you made earlier. Use the **Browse** to change any locations if necessary.
4. Click **Update** to update the software. When the update is complete click **Close**.

Opening EPIC for the First Time

5. Click on **Start, All Programs, Ford Investor Services, EPIC for Windows** to start the application.
6. The first time that EPIC launches a *Ford FTP* dialogue box will be shown. Enter your Ford User ID and Password then click **OK**.
7. Your security token will be retrieved and a *Successful Download* message will be displayed. Click **OK**.
8. A warning message may be displayed stating that an EPIC database can not be found. This is normal.

You are now ready to use EPIC.

Database Updates

The value of the EPIC application comes from the data provided from Ford Equity Research on a daily basis. Therefore it is important that the user is able to download the data from Ford's internet site to update EPIC.

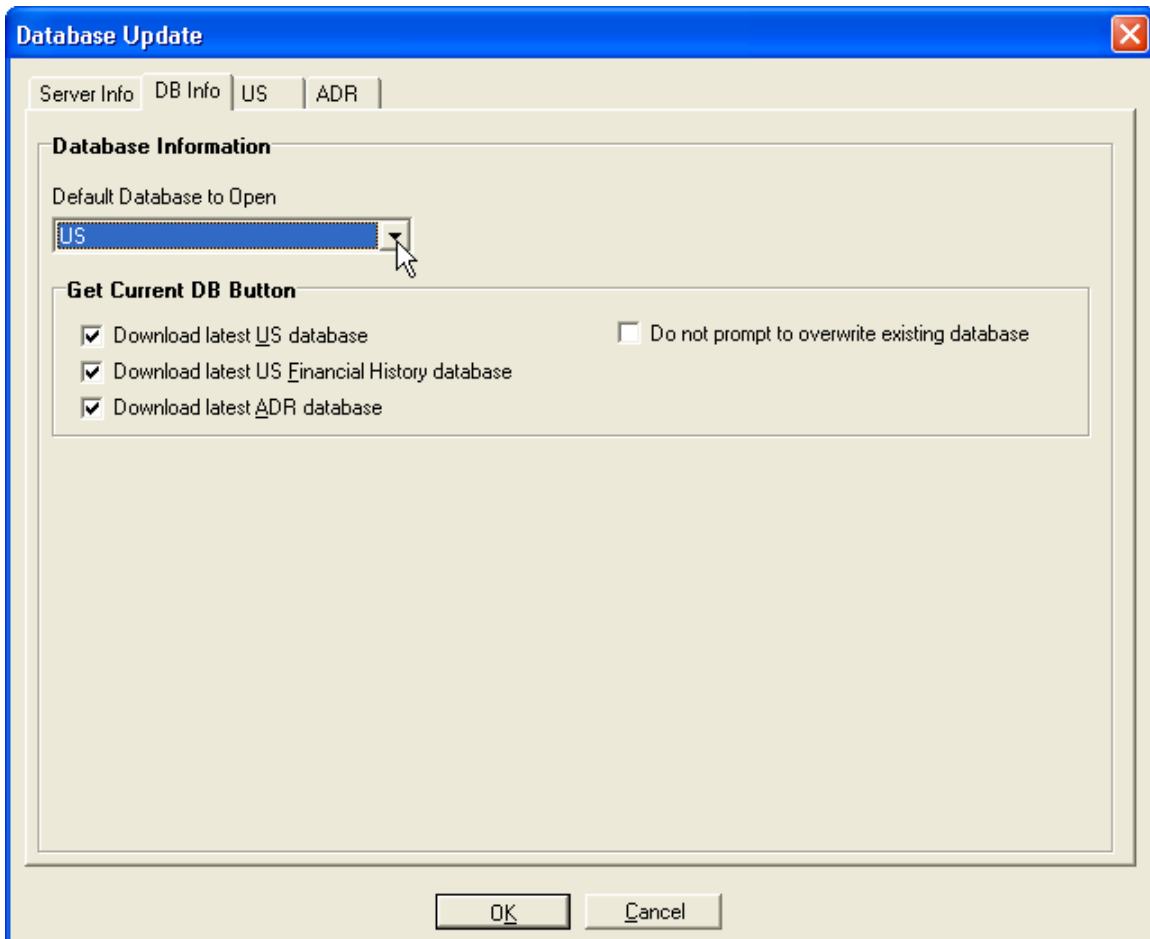
The data is available from <http://www.fordupdate.com> and EPIC can be configured to automatically download the data.

The following steps discuss using EPIC to update the data:

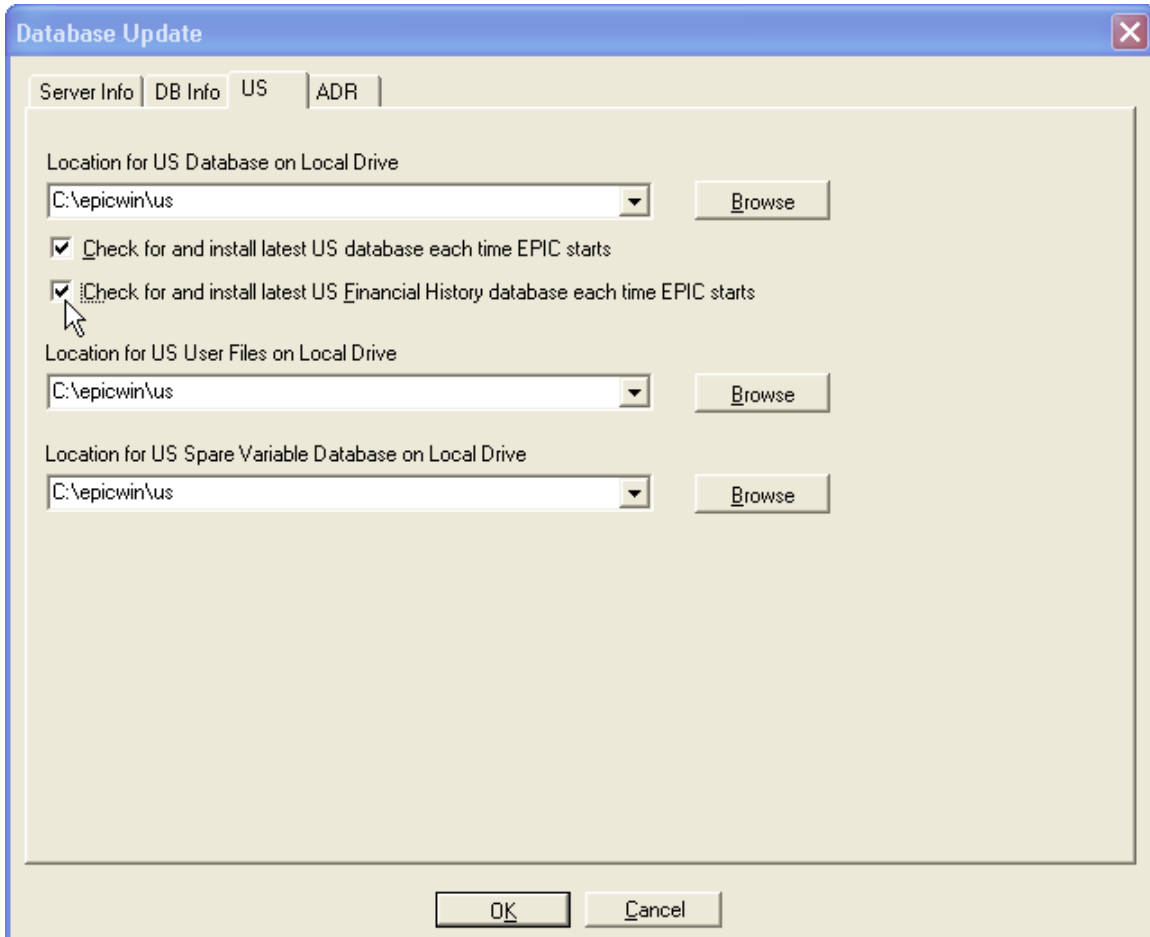
Configuring the Update

Before the database can be updated the *Database Update Information* needs to be configured in EPIC.

1. From the Windows **Start** menu click on **All Programs, Ford Investor Services, EPIC for Windows**.
2. From the menu at the top of the EPIC screen select **Options, Database Update**. The *Database Update Information* dialogue box will be displayed.
3. The *Location of Ford Server and Database File* should be left as default unless instructed by Ford Technical Support.
4. The Username and Password fields should be filled in with the account information provided to you by Technical Support.
5. Click on the **DB Info** tab.



6. If you are subscribed to more than one database type, eg ADR and US, you can select the database that you want to open when you launch EPIC from the *Default Database to Open* drop-down list.
7. The download process is configured in the *Get Current DB Button* section. Put a check mark against the databases that you wish to download by clicking in the box to the left.
8. Click on a Database tab, eg US. The database configuration will be displayed.

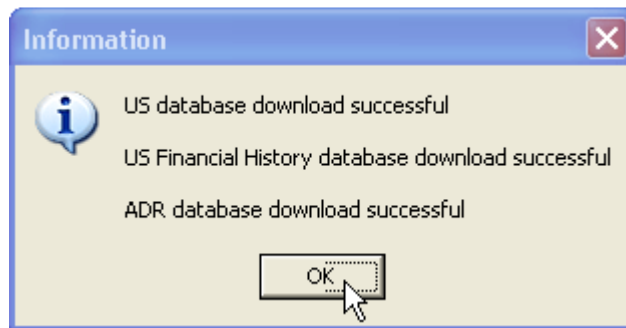


9. If you wish EPIC to check for an updated database automatically every time it starts check the **Check for and install latest US database each time EPIC starts** box. Repeat this step for each database that you wish to update automatically.
10. The *Location for Database* should be left as default unless instructed by Technical Support.
11. Once the information has been changed click **OK** to save your changes.

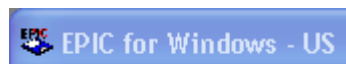
Updating the Data

Once the *Database Update Information* is configured the data can be updated.

1. Click on the **Get Current DB** button. A progress dialogue will be displayed for each database that is downloaded. When the download is complete an information box will be displayed with the results.



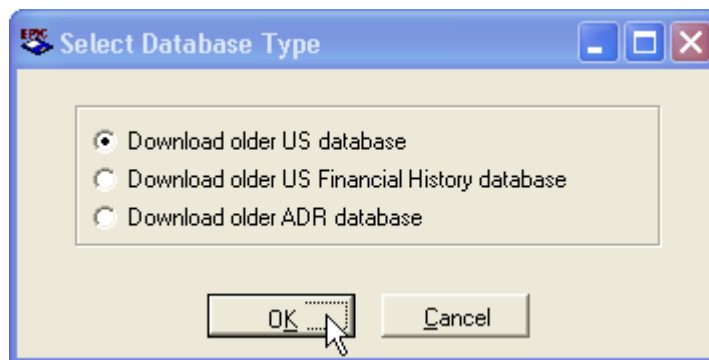
2. Click **OK** to close the *Information* box. The default database will be opened. The database type will be displayed in the window title and the database type will be displayed in the bottom, right hand corner.



Downloading a Previous Database

Version 5 of Epic introduces the ability to retrieve past databases. The following steps discuss downloading past databases into EPIC:

3. Click the **Get Older DB** button.
4. The *Select Database Type* dialogue will be displayed. Chose the type of database you wish to download and click **OK**.

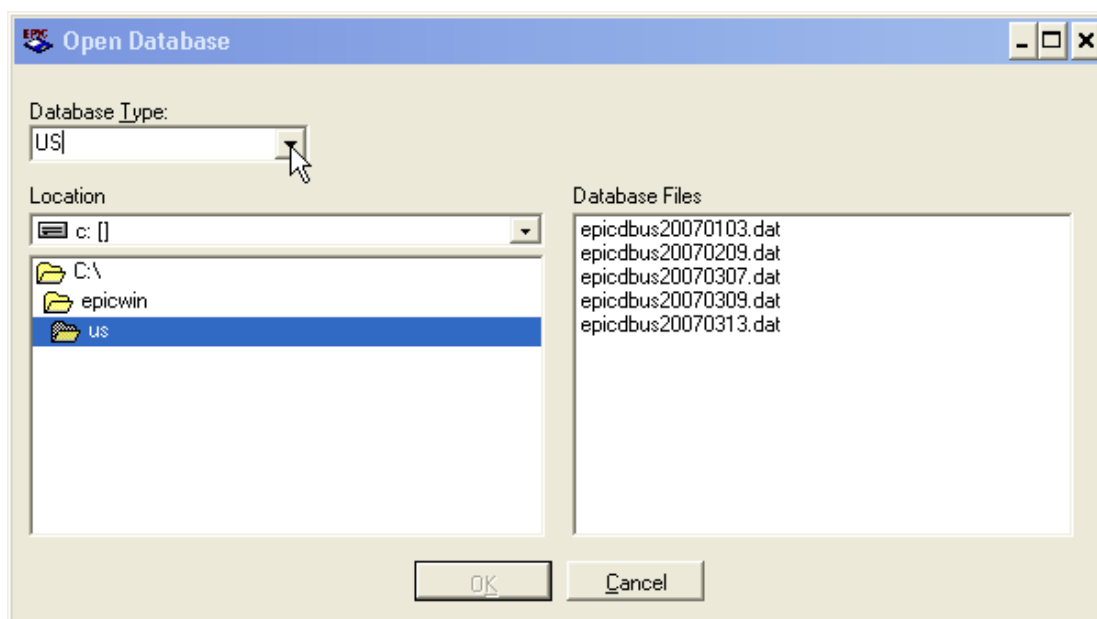


5. A list of previous databases will be displayed. Highlight the database type you want to download and click **Download**.
6. When the download is complete a *Successful Download* message will be displayed. Click **OK**. The downloaded database will be opened.

Switching Database

If you are subscribed to more than one database type, for instance the US and ADR databases, it is possible to switch from one database to another. The following steps discuss how to switch database type:

1. Click on the *Open Database* icon . The *Open Database* dialogue will be displayed.



2. Select the database type that you wish to open from the *Database Type* drop-down list.
3. A list of available databases for that database type will be displayed on the right.
4. Select the database that you wish to open from the list on the right and click **OK**.