Applied Epic® Browser Interface FAQ

It's an exciting time to be an Applied Epic user! The Epic browser interface is available for your organization, and we want you to have the best experience possible.
Below are the most frequent questions we have received about the browser interface of Epic. Please reach out to CustomerSuccess@appliedsystems.com or your Sales Representative if you have further questions.

Functionality in the Browser Interface	
What are the differences between the Epic browser and desktop interfaces?	There are very few differences in clicks or workflows between the two, except on transformed screens. Documentation on the differences is available using this link to the Applied Epic Browser User Guide in Applied Community.
What workflows will be most affected when we shift to using the browser interface?	It is recommended to review workflows regarding bulk scanning without barcodes (this workflow will require barcodes in a browser), attaching items to Epic using the + or New button from the Options Bar (this may change your workflow to drag & drop) and attaching items from Unrouted Attachments to a client account. It is also recommended your organization validate all Epic workflows specific to your organization. In order to assist you with this process, please use the Epic Browser Workflow Validation Spreadsheet available for download.
Do I need to have the Epic desktop interface installed on my computer to use Epic in a browser?	No, you do not need to have Epic desktop interface installed on your desktop to use the Epic browser interface.
Once our users start with the browser, can they keep the desktop icon?	Yes, users can keep the icon after shifting to the Epic browser interface, but it is recommended that the desktop icon be removed within a week or two of the change. The program can remain installed on the machine but removing the icon will ensure users are accessing Epic via the browser interface only. Important: One login session per credential is allowed – users cannot be logged into the browser and desktop interfaces with the same credentials simultaneously.
Are system updates automatic like the desktop interface or does it require manual system updates?	The Epic browser system updates are automatic like the desktop, and releases are monthly.

Can I still drag and drop attachments to Epic from Outlook like I can with the desktop interface?	Yes, with the Epic Connection Suite Package installed, drag-and-drop functionality is available.
Will the Epic desktop interface stop being updated and supported?	There is currently no end date for the support of the desktop interface, and releases will continue. Those releases will typically include security updates and bug fixes, but most new functionality is only available via the Epic browser interface.
Will my organization still have access to our Epic demo database in the browser?	Yes, your organization will still have access to the same databases you have access to in the desktop interface.
Can I still access CSR24 from the browser?	Yes, CSR24 is available in the same place (in Links on the Options Bar). Additionally, all Applied extended solutions that integrate with the desktop will also integrate with the browser.
What if some employees want to use the browser interface, but others want to keep using the desktop interface to login?	This is possible but please use caution going forward. There are screens in the browser interface that are different than the desktop interface as we go through Epic Transformation. For example, in browser the Add Client screen is totally transformed and you will only see this in the browser interface. Some screens and workflows will be different in some areas.
Is there a timeline for retiring the desktop interface?	Currently there is no scheduled retirement date for the desktop interface. Security updates and support for the desktop interface will continue, but new features are being released via the browser only.
How easy is it to use multiple monitors on the browser?	Very easy. Multiple monitors will work seamlessly with the browser interface, the same as other browser programs. You can pull the internet tabs into separate windows by clicking the tab and dragging to another monitor.
Can you use multiple screens in browser like you can in the desktop interface?	Yes! With all components of the Connection Suite installed, you will have multiple tabs within a browser, just like how Epic functions in the desktop interface.
We use Epic Document Writer in the desktop and understand that is going away. What do we use going forward to merge documents together?	Adobe Acrobat can be used to combine PDFs, then drag & drop the file into Epic. Most agencies who have switched to the browser found they can use the free version of Adobe Acrobat to meet their needs.
If you change desired/required fields in the browser interface, will that also change them in the desktop interface of Epic?	Yes, it will. Think of the browser and desktop interfaces as two different methods of accessing the same information. A change in Epic via browser will reflect in the desktop interface, and vice versa.

The workflow for attaching Unrouted Attachments in Epic browser is more clicks than dragging & dropping from the window to the client. Is this going to be fixed?	In a browser environment, you do not have the ability to drag and drop files from one window to another. This is not a limitation in Epic but is a limitation in a browser environment for security reasons. However, our Product Management and Development teams are working to make Unrouted Attachments easier in multiple ways, so stay tuned for updated functionality.

Epic Connection Suite	
What is the Connection Suite?	The Connection Suite is a set of components that enable Epic to work in conjunction with an internet browser and the Windows operating system simultaneously. Typically, web-based products do not seamlessly integrate with Windows for security reasons. Once the components of the Connection Suite are loaded, programs such as Outlook and Microsoft Word integrate in a similar manner to how they functioned with the desktop interface, while also ensuring the security of data.
Does the Connection Suite need to be installed on all Epic browser users' machines?	Yes. To ensure users have the best Epic experience in a browser, all components of the connection suite will need to be installed on each machine.
Can I still use Epic in a browser without the Connection Suite Package?	Applied does not recommend using Epic in a browser without the Connection Suite components installed. Your experience will be less efficient, and you will have less functionality. Additionally, there will likely be workflows you cannot complete. The Connection Suite components add key features to the browser interface and are recommended installs.
Does installing the Connection Suite Package require administrator privileges?	No, it does not. To install the Connection Suite Package, a user must have the necessary Epic Security permissions to access this area (see below for the path in Configure) but does not need to have administrator rights on the workstation. Applied strongly recommends the items in the Connection Suite be managed by your IT provider. Please refer to the Applied Epic Browser User Guide or reach out to Applied Support with questions.
Is there a Security Object in Epic for installing the Connection Suite components?	There is a Security Object for the Connection Suite in Program Access tab, Area: General, Sub-Area: General.

Can I have my IT team push the Connection Suite updates?	Yes, the files in the Connection Suite can be pushed to your users by the IT team. Please refer to the Applied Epic Browser User Guide or reach out to Applied Support with questions.
Is the Connection Suite Package installer silent?	If each person manages the Connection Suite Package individually, it requires manual launch and has a couple clicks to work through.
Can the Office add-ins be pushed via Office365?	No, we cannot push the Outlook/Word add-ins via Office365; however, your IT team should be able to use Microsoft Intune and similar products to push the Connection Suite Package to users.
Is the Connection Suite a one-time installation?	No, there are components of the Connection Suite Package that will need to be updated as technology changes. Please refer to the Epic Browser Release Notes (sign up for Technical Bulletins in Applied Community) for information pertaining to the Connection Suite updates.
Can a user login to the Epic browser interface, without Connection Suite, just by going to the URL and logging in?	Yes, you can log into the browser without the Connection Suite Package installed, however workflows that require the Connection Suite Package will be unavailable until those files are installed.
Are there any hardware requirements?	Any workstation that can run the Epic desktop interface can run the browser interface. Our updated Epic Hardware/Software Configuration Guidelines are available in Applied Community > Product Information > Release Information. From there, choose the latest Product Documentation.
Have you made the connection suite a single file or more automated install? What about being automatic?	The Connection Suite has been updated to be easier to install. There are 3 components: Epic Extension (required), Epic Connection Suite Package – .msi file extension (required) and the Epic Quotes Live Fill Applet (US) or Epic Rating Services Applet (CA). This last component is only required if you use a rating functionality integrated within Epic. We are continuously researching how to make the Connection Suite Package updates better.
How much lead time is there between the technical bulletin delivery and when the update is pushed out to the browser interface?	The Technical Bulletin will be sent 3 business days prior to the browser release. The Technical Bulletin will take you to the release information in Applied Community where you can check for Connection Suite updates. If there are updates, you can log into the browser interface to download the new file(s) and schedule the update push to go out in tandem with the update. The Connection Suite files are also available in Applied Community in Product Information > Applied Epic > Download Product Updates.

How will we know if the Connection Suite Package components are installed on our computer?	When you go to Help > Connection Suite, the components will now show a green “Installed” button (not clickable) in place of the blue button to install updates.
Does our IT Professional need their own Epic license to roll out the Connection Suite updates?	Not necessarily, no. Anyone with an Applied Community login can download the updates (provided this is permitted on their workstation) by going to Product Information > Applied Epic > Download Product Updates. Someone in your organization who has an Epic license can also download the files and send to your IT professional for distribution.

Epic Security	
Will my organization have access to the transformed screens automatically?	The transformed screens are available in the Epic browser interface for all organizations that ***do not*** have Epic Active Directory authentication enabled (that is, the transformed screen is available if you are prompted for a username and password when signing into Epic). An administrator at your organization can confirm your authentication type in ***Configure > Security > Logins***. If an option is selected in the *Single Sign On* section, **Active Directory Authentication** is enabled. If you would like to move from the outdated Active Directory security to a more secure platform, please reach out to Applied Support or visit our Identity Management page (login to Applied Community required). **Please note: the change to Epic will require users to enter a username and password each time they log into the system.**
Is Active Directory Authentication available in the Epic browser interface?	The technology used in *Microsoft Active Directory Authentication* within the Epic desktop interface is outdated and incompatible with the browser interface. Integrating your existing Identity Provider furnishes the modern security you’re looking for to replace Active Directory currently integrated with Epic. Visit our Identity Management page in Applied Community. If you are currently using Epic Active Directory and are going to make a change to Applied Identity Management, please research with your Identity Provider the login changes your users will experience. There may be ways you can add conditional policies to your IdP configuration that will help ease the transition.

Will Applied be offering MFA (multi-factor authentication) soon?	Applied recognizes the need to ensure that client data is secure. Applied Epic integrates with top IDPs (Identity Providers) that meet minimum security standards of OAuth 2.0 w/OIDC or SAML 2.0 standard. For more information and to get started with integrated IdP, please use the link below to login to Applied Community and review the Identity Management page.
Does the Epic browser environment get served from local brokerage servers, Applied servers or from Amazon servers?	A combination of Applied and Google Cloud servers are utilized.

Epic Browser Regional Use	
Is the Epic browser interface available in Canada?	Yes, the browser interface is available in Canada and will soon be available in the UK.
Will my brokerage be able to access Applied Rating Services in the browser interface?	Yes, ARS is available for users in Canada, and the integration is the same. Please note, there is a separate Connection Suite add-in that must be installed prior to using Applied Rating Services. If you have questions about the Connection Suite, please continue reading this FAQ, or contact Applied Support.

Miscellaneous Epic Questions	
Are there Epic Browser Office Hours?	Yes! We have bi-weekly sessions named “Epic Browser: Ask the Experts”. This is designed to be an open Q&A with our Epic browser interface experts in Adoption Services who can answer questions ranging from the differences between the desktop and browser environments, to connection suite questions, to “How do I roll this out to my organization?”. Space will be limited in each session to enable conversation. Log into Applied University and sign up here.
Are there Applied University courses about the browser interface?	Yes! Visit our browser section of the Customer Success Resource Hub. There is also a specific learning track within Applied University for browser.
Are there any documents, resources, or templates to communicate this change to our employees?	There are suggestions for communication on the Epic Browser Resource Hub. Scroll down to “Prepare for Applied Epic Browser” and click Communication Plan.

Can we make use of third-party extensions in Epic?	There are no supported 3rd party apps or add-ins in the browser environment. If you do have apps or add-ins installed in the same browser where you utilize Epic, they may work properly but will not be supported by Applied Systems if you encounter problems.
What internet browser is recommended for Epic in the browser interface?	Epic is supported in Chrome, the Chromium version of Edge and Firefox.
Does my organization need to be using Epic Cloud to use the browser?	Yes, the browser interface is only available for organizations using Epic Cloud. If your organization is still On Premises and you are ready to make the move, please reach out to your Sales Representative.
Is the speed in the browser slower than the desktop?	Applied has taken care to ensure the speed in Epic, regardless of how you login, is the same. However, the more tabs you have open in your internet browser windows, the more bandwidth is being used. That could cause sluggishness in all your browser-based programs. There are also network, security and internet browser settings that can affect performance of Epic in the browser interface. To ensure your organization's settings are reviewed, please refer to the Knowledge Base articles below: Update Network and Firewall Settings (KB 25073) Configure Native Messaging Allow List (KB 25074) Allow Pop-Ups for Applied Epic (KB 25289) Update Browser Cookie Settings (KB 25456) Verify Default PDF Program (KB 25457) Browser Performance Settings (Microsoft Edge) (KB 25082)
How does the data transfer from the Epic desktop to the browser interface?	All data is stored in our data centers. Both the desktop and browser interfaces of Epic access the same data inside our data centers, so there is no additional data transfer involved.
Will Applied make Epic available for a tablet?	Currently Epic is not available for use on tablets or phones. If your organization utilizes Applied Mobile via CSR24, you can use that mobile app to work on a mobile device.
Does Applied support Mac and Apple products like Safari?	Applied does not currently support Epic desktop or browser interfaces on an Apple product, including the Safari browser. The Connection Suite Package components operate using a Windows platform for the best user experience. In the future, this may change. You can also run a Windows Parallel program on your Mac to simulate a Windows desktop environment (and then load Connection Suite Package items), but support is limited at this time.

When will the desktop interface of Epic be sunset?	Currently there are no plans to end support for the desktop interface; however, all new features and functionality in Epic are only available via the browser.
The font in my browser is very small. How do we make it bigger?	The Epic browser interface utilizes the internet browser's zoom capabilities. To do this, hold down the Ctrl key on your keyboard and use your mouse wheel to scroll up or down. This will make the font and all other content on the page bigger.