

Workplace on Catalyst™ Upgrades in EPIC Admin

Past Everything DiSC and DiSC Classic learners are eligible for a **FREE** Everything DiSC on Catalyst upgrade. When using existing Everything DiSC data to create a new Everything DiSC on Catalyst access code, the learner will not be required to take the DiSC portion of the assessment again. Their previous DiSC style scores will be used in the new report. However, when using a DiSC Classic report to create a Workplace on Catalyst access code, the learner’s name and email address are carried forward, but the learner will complete the entire Everything DiSC on Catalyst assessment.

1. Select **Create a New Report/Issue Access Codes** from the *Manage Reports* menu.
2. Product Family, Product and Language selections are required before you can continue. Make your selections and click **Next**.

Select a Product Family, Product, and Language, then click the **Next** button to continue.

Product Family: ▼ ●

Product: ▼ ●

Language: ▼ ●

3. Select or add an organization by typing the organization name and click **Next** to continue. Learners assigned to the same organization will be visible to each other in the Catalyst platform. The organization selected here will apply to all learners assigned in this session.

Select or add an organization below by typing the organization name. Then click Next to continue.

Learners assigned to the same organization will be visible to each other in the online platform. The organization selected here will apply to all learners assigned in this session.

Organization: ●

As you begin typing the organization name, organizations that share the same characters appear in the list. If the organization for this set of learners does not appear in the list, just click the **+ Add** option that appears at the top of the list.

Organization: ●

- [+ Add "ABC C"...](#)
- ABC (Always Being Creative) Graphic Greensboro Designs
- ABC Armstrong and Bonauer Lengenau 
- Consulting GmbH

You will be prompted to enter the organization’s name and city. Then click **Add** to save the organization.

Add Organization

Enter the Name and City of the Organization below.

Name:

City:

Note: Any organizations that you add can be edited later from the Manage Organizations page.

Manage Your Account ▾ Personal O

- [Transfer Credits to Parent Account](#)
- [Unassign Access Codes/Reclaim Credits](#)
- [Credits Charged for Reports](#)
- [Folder Maintenance](#)
- [Manage My Organizations](#)
- [Manage Users](#)
- Account Activity Reports**
- [Account History](#)
- [Profile Completion - Detail](#)
- [Profile Completion - Summary](#)
- [Pending Credits](#)
- [Unassigned Access Codes](#)
- [Credit Activity Report](#)

All EPIC primary and sub accounts will see the organization in the dropdown list. When you add an organization, it is visible to all EPIC users that have the Workplace on Catalyst product in their account.

4. Applications: Select the applications available to the learner on the Catalyst platform and click **Next**. All learners will have access to Workplace on Catalyst by default. If not added now, additional applications can be added at a future date.

Select Applications

Select the applications available to the learner on the Catalyst platform. All learners will have access to Workplace on Catalyst by default. If not added now, additional applications can be added at a future date.

[Check All](#) | [Uncheck All](#)

Workplace on Catalyst

Agile EQ on Catalyst (10 Credits)

5. Report Details: Choose a folder and/or sub folder in which to create new Access Codes or select the New Folder link to create a new folder.
6. Delivery and Auto Reminder Options: Choose delivery and auto reminder options.
7. Add Respondents: Click the **Use Existing Report** tab and click **Search**.

Use the **Search** button to locate Respondents who have a completed report.

Note: Respondents will only be required to answer assessment questions that are specific to the new report.

8. Enter your search criteria and click **Search**.

Access Code Status:	<input type="text" value="Complete"/>	<i>Search by profile status</i>
Name:	<input type="text"/>	<i>Search for the partial or entire name of a person or team</i>
Date Range:	<input type="text"/> - <input type="text"/>	<i>Search by start and/or end date (Reset)</i>
Product Family:	<input type="text" value="Everything DiSC"/>	<i>Search by product family</i>
Product:	<input type="text" value="- None Selected -"/>	<i>Search by product name</i>
Language:	<input type="text" value="- None Selected -"/>	<i>Search by product language</i>
Folder:	<input type="text" value="- None Selected -"/>	<i>Search within a folder</i>
Sub Folder:	<input type="text" value="- None Selected -"/>	<i>Search within a sub folder</i>
Email:	<input type="text"/>	<i>Search for a partial or entire email</i>
Access Code:	<input type="text"/>	<i>Search for a specific Access Code</i>
Results Per Page:	<input type="text" value="10"/>	<i>Number of results to display per page</i>

9. Select the checkbox(es) to the left of the existing reports that you want to upgrade and click **Next**.

<input checked="" type="checkbox"/>	<p>Name: D Stiles</p> <p>Respondent Name: D Stiles</p> <p>Email: dstiles@noemail.com</p> <p>Learner Account Email: dstiles@noemail.com</p> <p>Access Code: YJRHQ5MYT5</p>
<input checked="" type="checkbox"/>	<p>Name: Tommy Tester</p> <p>Respondent Name: Tommy Tester</p> <p>Email: tommytester@noemail.com</p> <p>Learner Account Email: tommytester@noemail.com</p> <p>Access Code: H7VAVBBCRSG</p>

The learners will appear in the list of respondents that will receive an access code. Discounts are reflected in the “Qty/Cr” column.

Enter Individual
Import from Excel
Use Existing Report

After entering the Respondent information, click the **Add** button to add the name to the list. Click the **Assign Access Code(s)** button when you're finished adding Respondents.

(Note: If you assign more than 10 Access Codes, they will be queued for delivery and sent out in intervals to avoid being marked as "spam" by the Respondent's email server.)

Email: Name: Quantity: View Report: **Yes** Add

The list below displays the Respondents that will receive an Access Code. To remove a name from the list, click ✕.

Email	Name	Qty/Cr	View
✕ dstiles@noemail.com Edit	D Stiles ¹	1 (0cr)	Yes
✕ tommytester@noemail.com Edit	Tommy Tester ¹	1 (0cr)	Yes

Total Quantity: 2
Total Credits: 0

¹ One or more respondent(s) qualifies for credit discount.

10. Select the organization confirmation checkbox below the respondent list.

I confirm that the individual(s) assigned to the selected organization are part of that organization. ●

11. Click **Assign Access Codes**.

12. Click **OK** to confirm the credit deduction.

13. Click **OK** to customize the email to learners or click **Cancel** to send the default email message. The confirmation page displays a summary of the product, learners, and EPIC credit activity associated with this transaction.