

Technical and Troubleshooting Guide for Everything DiSC[®] on Catalyst[™]

Everything DiSC[®] on Catalyst[™] is a personal development learning experience that equips people with the social and emotional know-how for more effective interactions at work—no matter who or where they are.

By combining a proven solution with instructor-led training and a powerful learning platform, Everything DiSC[®] helps people:

- Better understand themselves
- Appreciate and value difference in perspective and approach
- Readily and consistently adapt to the unique needs of each person or situation they encounter

The result is lasting impact. For your learners, *Everything DiSC on Catalyst* makes the hard work of lasting behavior change possible... even fun. For your organization, *Everything DiSC on Catalyst* helps foster an engaged, collaborative, and adaptive culture that drives results.

Before You Get Started

This document is designed to assist EPIC administrators and/or facilitators with the Catalyst[™] platform. If you need further assistance, please contact your Authorized Partner.

To set yourself up for success and ensure that learners receive assessment and EPIC Admin emails for *Everything DiSC on Catalyst*, we recommend the organization whitelists Wiley email addresses. For more information, review the Email Troubleshooting document here:

https://admin.wiley-epic.com/help/en/docs/EPIC_Email_Troubleshooting.pdf

For the Best Experience on Catalyst[™]

To maximize the full potential of the Catalyst platform and its features, we recommend you encourage your learners to do the following:

- **Bookmark the Catalyst platform** – this way they can easily return to the platform to dig in deeper or learn more about how to work effectively with their colleagues
- **Add a picture to their account** – this will help colleagues recognize and find one another
- **Indicate their department within their organization** – this feature helps to filter and sort colleagues within the Your Colleagues feature on Catalyst; it assists with finding relevant colleagues.

Browsers We Support

Use one of the recommended browsers to ensure the Catalyst features are fully accessible:

- The latest version of **Chrome**
- The latest version of **Microsoft Edge** for Windows
- **Safari** version 10 or later

Basic Troubleshooting Tips

If at any point learners report difficulty completing the assessment, accessing the platform, using features within the platform, or if something just doesn't look right, we recommend they try these things first to resolve the issue:

- Our recommended browser is Google Chrome; switching to Chrome or a different browser such as Microsoft Edge or Safari may resolve the issue. We advise against Internet Explorer.
- Log out of the platform and log back in.
- Close the entire browser and reopen a new session.
- Clear the cache.
- Adjust the screen size or resize screen for desktop.
- If experiencing difficulties accessing the platform on a mobile device, switch to a desktop or laptop if available.
- Ensure the browser's zoom setting is 100% or less.

The Assessment

1. I can't move forward in the assessment; there is nowhere to click to progress.

This is often related to the size of the screen. Try the following:

- Adjust your screen size to make it smaller.
- If that doesn't work, we recommend switching to one of our supported browsers (Chrome, Microsoft Edge, or Safari).

2. I took the assessment for Catalyst™ and my style was different than the last time (or previous times) I took it.

DiSC® styles can change from one assessment to the next for a number of reasons, including life changes, job changes, or taking the assessment in a completely different environment (i.e., stressed, tired, etc.). Even over a very short period of time, a small but not insignificant percentage of people can see change in results not because their personality has changed but because of factors like mood or simply interpreting the questions differently than they did on the original assessment. On average, we see a 12-degree shift in someone's dot placement when they take the assessment a second time. Because the Everything DiSC® style can shift between two assessments, we highly encourage the "use existing report" feature when issuing access codes.

Following this process ensures that the DiSC style stays exactly the same from one assessment to the next. For information on how to use this feature in EPIC, see question 28.

Everything DiSC is a highly validated and reliable assessment. To ensure the stability of the assessment, we used test-retest reliability across a large sample. It's important to remember that it is almost impossible to obtain perfect test-retest reliability for any sophisticated psychological test, DiSC included. That being said, stability is measured by how closely correlated those test-retest scores are; correlations range from 0 to +1. The closer the correlation coefficient score is to +1, the more stable the tool is. Researchers tend to deem correlation coefficients above .70 as acceptable and coefficients above .80 as very good. The correlation coefficient on all eight DiSC scales is .85 or above. You can find more information about reliability in the *Everything DiSC Research Report* or the *Everything DiSC Manual*.

3. I've already taken an Everything DiSC® assessment, so why was I forced to take the whole assessment again?

There are a few reasons why a learner may have taken the entire assessment:

- Existing data was not used when the *Everything DiSC® on Catalyst™* access code was assigned.
- The assessment the learner previously completed was taken prior to 2012 when adaptive testing was introduced.

4. Why am I being asked all these questions about conflict, emotional intelligence, or management when my content is not related to those topics?

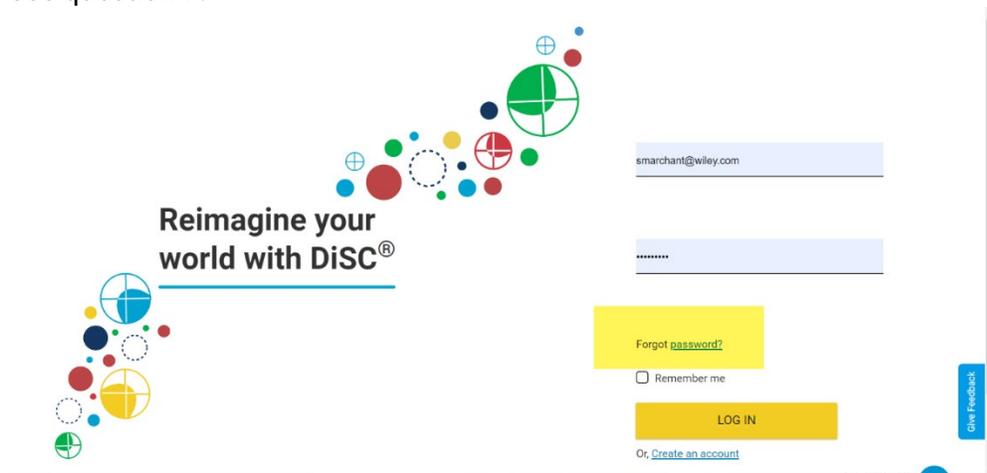
The future vision of *Everything DiSC on Catalyst* transitions the learning experience from a once-and-done event to a return-and-learn, ongoing process. Making that transition requires we remove barriers that currently stand in the way of learners continuing their DiSC journey after that initial experience. One of those barriers is asking a learner to take an additional assessment each time a new experience is offered.

The *Everything DiSC on Catalyst* assessment integrates questions from *Everything DiSC Workplace®*, *Everything DiSC® Agile EQ™*, *Everything DiSC® Management*, and *Everything DiSC® Productive Conflict* right away at the beginning of the learner's DiSC journey. As a result, learners will not have to take a new assessment when they are given access to future Everything DiSC content on Catalyst (when additional content becomes available), greatly reducing complexity in their DiSC journey.

Catalyst™ Account Creation

5. It says I already have a learner account, but I don't remember my password.

Reset your password by clicking "Forgot password?" If you don't receive your password reset email, see question 7.



6. What are the password requirements?

Your password must be:

- 8-30 characters

And must include 3 of these:

- Uppercase character
- Lowercase character
- Number
- Special character: ~!@#\$%^&*()-_+{}|[]\.;:","?.,/

Don't use:

- Spaces
- Your email address

7. I didn't get my password reset email. What do I do?

There are a few things that may be going on.

- Sometimes, emails can get trapped in spam filters. Check your spam or junk folder in your inbox. You can also work with your IT department to make sure you've whitelisted Wiley sites. EPIC administrators can find an email troubleshooting document here: https://admin.wiley-epic.com/help/en/docs/EPIC_Email_Troubleshooting.pdf
- You may not have an existing account. If you entered an email address that is not associated with an Everything DiSC® learner account, you won't receive a reset password email. Try creating an account with that email to confirm whether or not you have an account.

8. It's prompting me for an access code. Where do I find it?

Your access code should be in the initial email invitation you received. Copy and paste the access code where prompted, making sure there are no extra spaces.

9. If I have multiple email addresses, which one should I use?

We recommend using the email associated with your organization or the email that you are directed to use by your organization. Remember, the email you choose will be associated with your Catalyst™ account and will be where you receive your password reset emails.

10. How do learners change or update their email address connected with their Catalyst account?

Learners can change or update their email address for their Catalyst account by going to “Account Settings” in the menu structure or clicking the avatar or photo image by their name.

The Catalyst™ Platform

11. I’m trying to log into the platform, but it won’t load.

If learners are having trouble logging into the platform or getting knocked off, we recommend switching to one of our supported browsers (Chrome, Microsoft Edge, or Safari).

12. What is the URL of the platform?

We would recommend instructing your learners to favorite the platform in their browser. The website URL is <https://catalyst.everythingdisc.com/>.

The Colleagues Section

13. I’m not comfortable sharing with colleagues. Can I keep my DiSC® information private?

Yes. Learners who wish to remain private can opt out of sharing, though they’ll miss out on valuable tips and insights on working with their colleagues. To opt out, they should go to their “Account Settings” in the menu structure, choose the “Privacy” tab, and select “Off” under “Share with colleagues.”

These learners will be hidden from others in the Colleagues section, and will also be unable to see the DiSC information of others in the organization. Any time they return to the Colleagues section, they’ll have the option to turn sharing back on to take advantage of this feature.

14. Am I visible to everybody?

No, the Catalyst platform limits information sharing so that only individuals within an organization have access to one another. This feature allows learners to take advantage of the power of DiSC immediately by finding their colleagues and gaining actionable tips for improved interactions.

Note, too, that any learner who has opted out of sharing, as described in question 13, will not be visible to anyone in the Colleagues section.

15. Can I set it up so that members of certain departments can't see members of other departments?

At this time, the Catalyst™ platform is set up so all individuals within an organization have access to one another (aside from those individuals who have opted out of sharing, as described in question 13). This enables learners to take advantage of the power of DiSC® immediately by finding their colleagues and gaining actionable tips for improved interactions.

16. What are filters and how do learners use them?

Filters can be used in the Your Colleagues page of the Catalyst platform to help learners find others. Learners set their own filters based on who they're looking for or DiSC styles they're interested in learning more about. Learners can also filter by department. Department is filled in individually by each learner. They can create their own or select from departments already entered. Any department entered by a learner will show as an option for future learners in that same organization. For the best experience, we recommend that learners fill in the department information, as well as uploading a photo.

17. Why can't I see my colleagues?

There are a few possibilities:

- If a learner is the first person to complete the assessment in their organization, they will not see colleagues in the Colleagues section.
- If a learner has opted out of sharing (as described in question 13), they will not be visible to others in the Colleagues section.
- If the learner is in the wrong organization, they may not recognize the people they see. The EPIC admin can change the organization someone is assigned to. See question 24 for instructions on how to change the organization.
- Filters may have been selected. Filters can be cleared by clicking "Reset all filters" at the top of the filter list.

18. Can I see people outside of my organization?

No, you will only see people who are in your same organization and have completed a Catalyst assessment. If you are part of a large organization, this may mean that you see some people who are not familiar to you or whom you've never met before.

19. I see people but don't recognize their names.

There are a few things that may be happening here:

- Learners see people depending on the organization they are assigned to. It may be that the organization is very large, and therefore learners don't recognize some colleagues. Learners can filter by department to find people most relevant to them.
- If the learner is in the wrong organization, they may not recognize the people they see. The EPIC admin can change the organization learners are assigned to. See question 24 for instructions on how to change the organization.
- Filters may have been selected. Filters can be cleared by clicking "Reset all filters" at the top of the filter list.

Account Settings

20. How do learners add or change their department within their organization?

Learners can add a department or change the department they are currently in by going to “Account Settings” in the menu structure or clicking the avatar or photo image by their name.

21. How do learners add or remove a photo?

Learners can add or remove a photo on their account by going to “Account Settings” in the menu structure or clicking the avatar or photo image by their name.

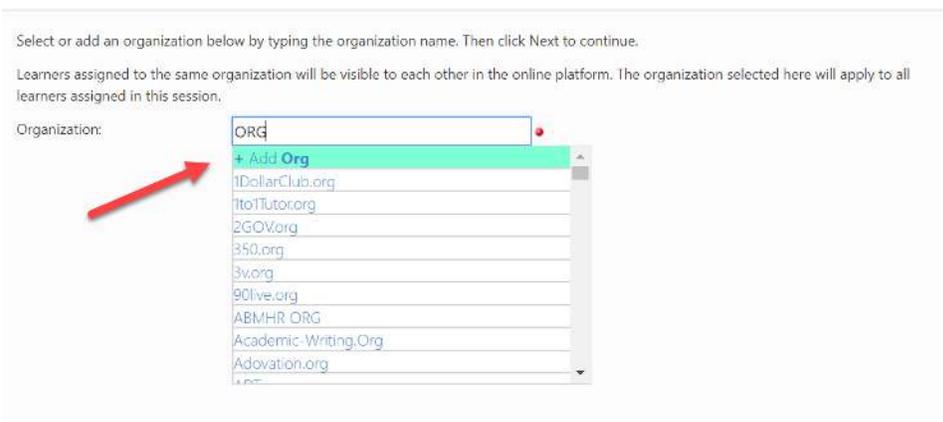
EPIC Administration of Everything DiSC® on Catalyst™

22. How do you set up people in organizations?

When you assign access codes in EPIC, you will be required to enter an organization. All people who are assigned to that organization and have completed their assessment will be visible to one another and be able to view one another’s styles.

23. What if the organization isn’t listed in the drop-down menu in EPIC?

You can manually create and add an organization within EPIC. Click the “+Add” option at the top of the drop-down menu after typing in the organization. Please note, once you create an organization, it will be visible globally in EPIC in the organization drop-down menu.



24. How do I change a learner's organization?

EPIC administrators are able to change a learner's organization by following the steps below:

1. Go to Manage Reports > Edit Existing Reports.
2. Enter the necessary search criteria to find the learner.
3. When you locate the learner, click "Edit."
4. Update the "Organization" field.
5. Click "Save."

EPIC administrators can also change the organization for multiple learners at the same time.

1. Go to Manage Reports > Catalyst: Edit Organizations under "Batch Functions."
2. Select the organization you would like to update for your reports.
3. Enter the necessary search criteria to find the learners.
4. Select the learners you want to move to the selected organization.
5. Click "Next."
6. Click "Update Organization."

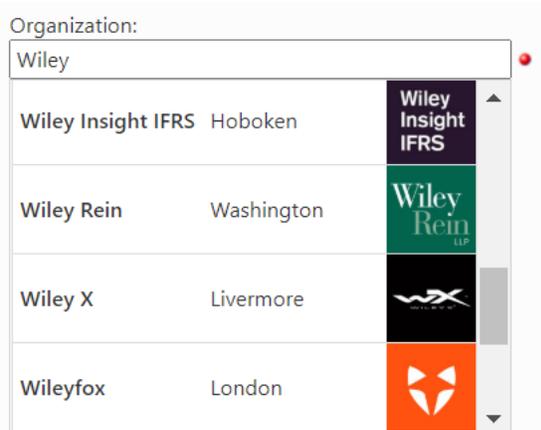
25. I made a typo when I created a new organization; how do I fix it?

To correct a typo in an organization you created, do the following:

1. In EPIC, go to Manage Your Account > Manage My Organizations
2. Next to the organization, click "Edit"
3. This will open a window that allows you to edit the organization's name and city

26. There are multiple organizations with the same name as mine; how do I know which one to select?

EPIC administrators will see the organization's name, city, and logo in the Organization drop-down when assigning a new access code or editing an existing access code. This should help you select the correct company.



27. What if a learner needs to belong to more than one organization?

Individual Catalyst™ accounts can only belong to one organization. For situations in which learners need to be in two organizations, learners will need to complete a second Catalyst assessment and create a new learner account with a different email address. If a learner adds a new Catalyst report to their existing Catalyst account, the newer access code will override the original and the learner will only see the organization that was assigned to the new access code.

Upgrading to Everything DiSC® on Catalyst™

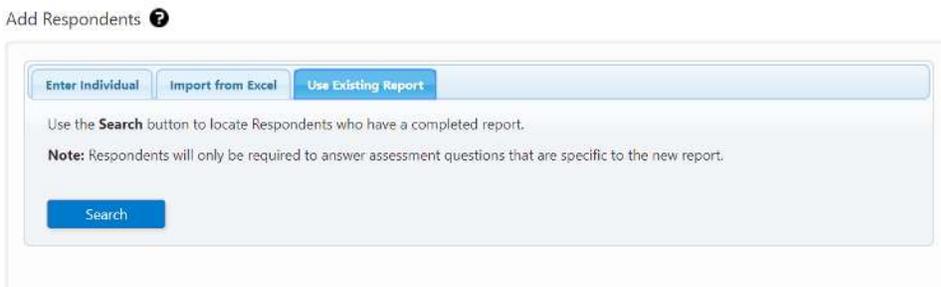
28. How do I receive the upgrade discount?

The following Everything DiSC® profiles qualify for a free upgrade through December 31, 2021:

- Everything DiSC Workplace®
- Everything DiSC® Agile EQ™
- Everything DiSC® Productive Conflict
- Everything DiSC® Management
- Everything DiSC® Sales
- Everything DiSC Work of Leaders®
- Everything DiSC 363® for Leaders
- DiSC® Classic

To ensure you receive the upgrade discount, you must use existing data from one of those profiles when assigning *Everything DiSC® on Catalyst™* access codes. To use existing data, you will need to use the “Use Existing Report” tab when assigning access codes:

Add Respondents ⓘ



Enter Individual Import from Excel Use Existing Report

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.

Search

29. Why didn't I get my upgrade discount?

There are a few reasons why you may have not received the discount:

- You did not use existing data when assigning the *Everything DiSC on Catalyst* access code (see question 28).
- You used existing data from a profile that is not part of the upgrade program.

30. Which DiSC Classic products can I upgrade to *Everything DiSC on Catalyst* for free?

All DiSC Classic products are part of the free upgrade program to *Everything DiSC on Catalyst*. To ensure you receive the free upgrade, just make sure to use existing data when assigning the access code (see question 28).

31. What if learners don't have email addresses?

Catalyst™ is a digital platform that requires a learner to have an email address. Unfortunately, learners without an email address will be unable to use the Catalyst platform but could explore options with other Everything DiSC solutions.

32. Why can't I see other Everything DiSC profiles in Catalyst?

Everything DiSC Workplace® on Catalyst™ and *Everything DiSC® Agile EQ™ on Catalyst* are currently the only profiles available for use on the Catalyst platform.

33. My Everything DiSC® Agile EQ™ content is not appearing on the Catalyst™ platform. What do I do?

Learners should contact their EPIC Administrator for assistance. Administrators should enable the Agile EQ application through EPIC Admin as described in the [Catalyst EPIC Administration.pdf](#) file.

34. Why can't I add my Catalyst profile to MyEverythingDiSC?

Everything DiSC® on Catalyst™ is not available for use on MyEverythingDiSC.