



Catalyst Administrator Experience

Managing organizations, learners, departments, and groups

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Overview

The Everything DiSC® on Catalyst™ administrator experience supplies users with a simple method of managing Catalyst for their organization. Catalyst administrators can manage organizations, departments, learners, assignments, and groups directly from the Catalyst platform. All Catalyst-related functionality in EPIC is operational; most changes made in Catalyst are visible in EPIC, and vice versa.

Accounts in Catalyst refer to EPIC primary and sub accounts that store credits. Administrators who have synchronized their single Catalyst user with multiple EPIC administrators have access to an *Accounts* page in Catalyst. The *Accounts* page acts as a home page for administrators with multiple EPIC accounts. So, they must first select an Account before performing any administrative actions.

Organizations are the companies where Catalyst learners work. An Everything DiSC practitioner in a company might only have access to one organization. An Everything DiSC® Authorized Partner servicing multiple companies, however, will have access to multiple organizations.

Everything DiSC® Practitioner
working for one organization



Everything DiSC® Authorized Partner
working with multiple organizations



Users in Catalyst can have the administrator and/or the learner role. The role determines activities the user can perform. Administrators manage access to an organization's Catalyst data, and a learner consumes the interactive Catalyst learning content. A user can be an administrator in multiple organizations, but their learner role can only be associated with one organization.

Learner

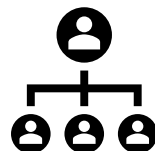


Administrator



Departments and **Groups** offer ways for users to bring meaning to and organize multiple learners. Each organization has its own set of Departments which help find learners on the *Your Colleagues* page. Groups of learners can be created to further represent interdepartmental and cross-functional teams of people within the same organization. And the Catalyst administrator can organize learners into these Departments and Groups.

Departments



Groups



Content refers to the information learners can access after completing their Catalyst assessments: Workplace, Worksmart, Management, and Agile EQ. All learners receive Workplace content. Unlock Worksmart, Management, and Agile EQ content when a learner is created or later. Use credits from the associated EPIC account to unlock Catalyst content.

Getting Started

User Synchronization

To gain access to the Catalyst administrator experience, you must have a Catalyst learner account and an EPIC administrator account. Then you must synchronize your EPIC administrator and Catalyst learner accounts. This synchronization – or user mapping – allows you to access organizations, departments, learners, content, and credits from both platforms. If you are a user in multiple EPIC accounts, then synchronize *each* of your EPIC users with your Catalyst learner by performing the following steps.

1. Log into EPIC at **admin.wiley-epic.com**.
2. Click **Personal Options** and select **My Personal Settings**.
3. Select **Synchronize my EPIC and Catalyst users** from the dropdown.
4. Enter your Catalyst **email address** and **password**.

Note: Your EPIC username and password may automatically appear in the *Catalyst Email* and *Catalyst Password* fields if your browser settings are enabled to “view and autofill passwords and passkeys.” So, verify the correct login credentials before continuing.

5. Click **Sync Users**.

Personal Options

My Personal Settings

What does it mean to sync my EPIC and Catalyst users?

To support administrators in managing Catalyst more efficiently, we've created the Catalyst Administrator Experience that streamlines Catalyst administration, allowing Admins to create & manage organizations, assign Catalyst assessments, and organize learners into departments and groups.

In order to access your Catalyst Administrator Experience, you will need to sync your EPIC Administrator Account with your primary Catalyst Learner account. If you are a user in multiple EPIC accounts, then synchronize *each* of your EPIC users with your Catalyst learner. You can synchronize **all** your EPIC users with the **same** Catalyst user.

Critical steps:

1. **Confirm you're logged into the correct EPIC account.** Verify the current account where you are logged in is your unique EPIC Admin account.
 - o **If you are sharing the same EPIC Admin user ID and password with multiple people:** This is not recommended for data privacy and security reasons. In addition, you will experience problems and will not be able to sync properly. **Before syncing, create a unique EPIC Admin account for yourself.** (If needed, this can be done via *Manage Your Account – Manage Users*.)
2. **Enter your primary Catalyst Learner account email and password.**
 - o **Before clicking the “Sync Users” button,** please be sure that the information in these fields **has not been auto-filled with saved information from your browser.**

Change your personal settings here. Click the **Save** button to update your login information.

NOTE: Passwords are case-sensitive.

Edit User Information ?

Select a function to perform: **3**

Enter your Catalyst Email:

Enter your Catalyst Password: **4**

Sync Users **5**

6. Click **OK** after carefully reading the warning.

We recommend reviewing the critical steps on the previous screen before syncing your accounts.

This EPIC Administrator account user [redacted] will be synced with the Catalyst profile [redacted]. After syncing, you will log into both the EPIC Admin Account and Catalyst with this username and password.

Select Ok to continue or cancel to return to the sync option.

6 OK Cancel

Perform steps 1-5 for each of your EPIC users. You can synchronize all your EPIC users with the same Catalyst user.

Review which administrators in your EPIC account have synchronized their users from the *Manage Your Account > Manage Users* page. An email address in the *Learner Email* field shows a synchronized user. Unlinked users display “Catalyst user is not Synced” in the field.

View All Users ?

| | | | |
|--|-----------------------------|------------|--|
| Name | Francis Jenkins | Username | fjenkins |
| Email | fjenkins@noemail.com | User Level | Super Administrator |
| Learner Email | fjenkins@noemail.com | | |
| <input checked="" type="checkbox"/> Send notification email when a respondent completes a profile | | | |
| | | | |
| Name | Bridget Corruthers | Username | bcorruthers x |
| Email | bcorruthers@noemail.com | User Level | Super Administrator |
| Learner Email | Catalyst user is not Synced | | |
| <input checked="" type="checkbox"/> Send notification email when a respondent completes a profile | | | |
| Edit | | | |

Login

Catalyst learners and administrators log into Catalyst the same way.

1. Navigate to **catalyst.everythingdisc.com**.
2. Enter your email address and click **Continue**.



Reimagine your world with
DiSC®

Sign in

Email

Enter your email address

Continue

New to Catalyst™? [Create an account](#)

3. Enter your password and click **Sign in**. Click **Change email** to change or edit your email address – in case of a typo or wrong address. Click **Forgot your password** to receive a password reset link.



Reimagine your world with
DiSC®

Enter password

matas@noemail.com [Change email](#)

Password

Enter your password

Show

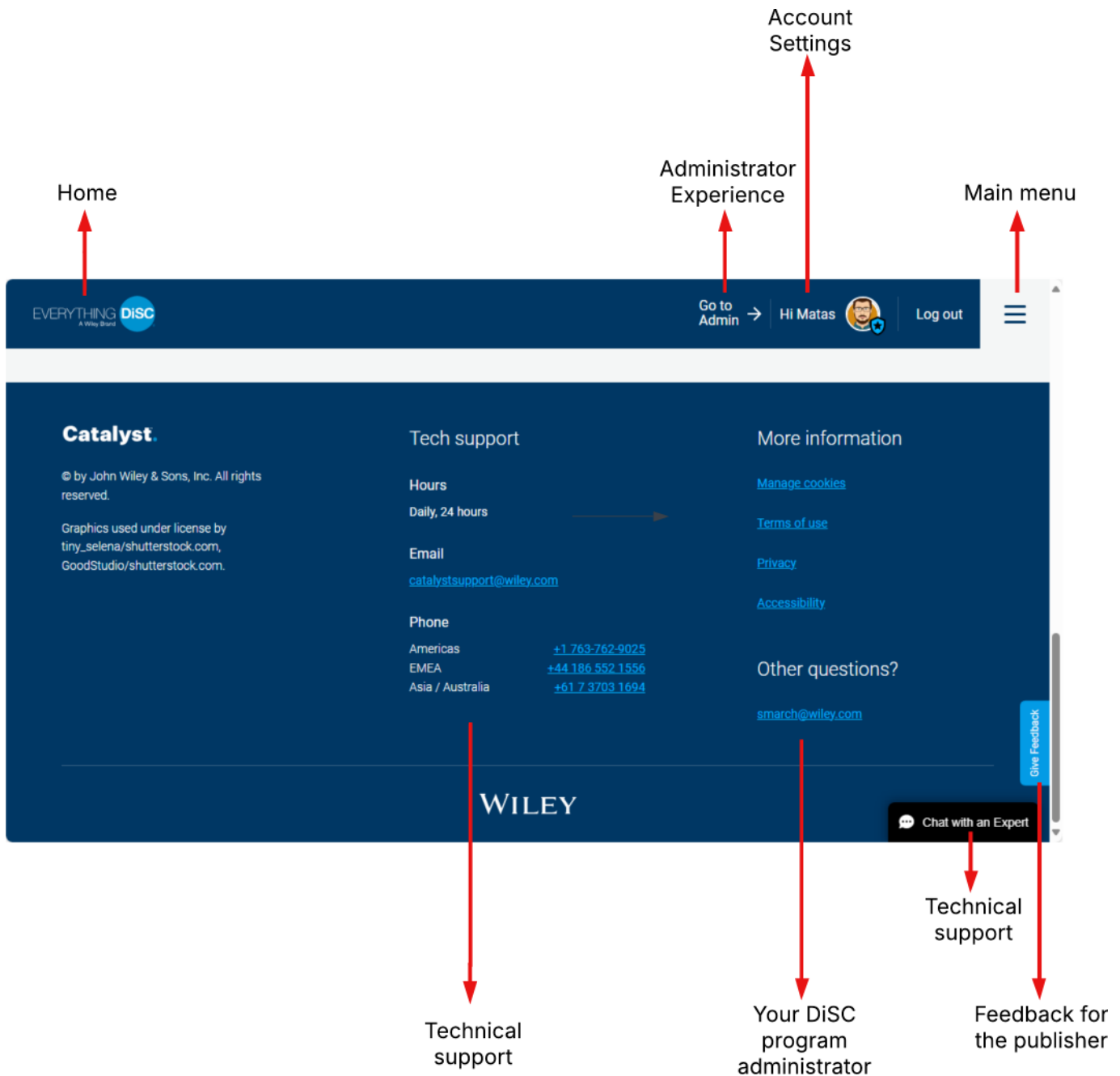
Sign in

[Forgot your password?](#)

Common Components

Header and Footer

The persistent Catalyst header provides navigation and support.



Account Settings

The *Account Settings* page is the same for learners and administrators. It allows users to change their name, department, photo, login credentials, and privacy settings.

1. Click **Hi...** in the header to open your Catalyst user's account information.
2. **Your information** stores your photo, name, language, and department.

The screenshot shows the 'Your information' section of the account settings page. On the left, there is a sidebar with three tabs: 'Your information' (selected), 'Login/password', and 'Privacy/communication'. The main content area is titled 'Your information' and contains the following elements:

- Options to 'Upload new photo', 'Download with style', and 'Remove photo' (in red text). To the right is a circular profile picture of a man with glasses and a beard.
- Form fields for 'First name' (containing 'Matas') and 'Last name' (containing 'Patton').
- A 'Preferred Language' dropdown menu set to 'English'. Below it, a note states: 'Agile EQ™ and Management are only available in English.'
- A 'Your department' dropdown menu set to 'Talent and Development' with a close icon (X). To the right is a link: 'Or create a department'. Below this is a note: 'Can't find it? Check for nicknames and abbreviations.'
- 'Cancel' and 'Save' buttons at the bottom.

3. Click the **Login/password** tab to update your email or password.

The screenshot shows the 'Login/password' section of the account settings page. On the left, the sidebar has three tabs: 'Your information', 'Login/password' (selected), and 'Privacy/communication'. The main content area is titled 'Login/password' and contains the following elements:

- Form fields for 'Email' (containing 'matas@noemail.com'), 'Old password', 'New password', and 'Confirm new password'.
- 'Cancel' and 'Save' buttons at the bottom.
- A password requirements box on the right with the following text:
 - 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
 - Any special characters aside from those specified above
 - Diacritical marks (e.g., é or ã)

4. Click the **Privacy/communication** tab to adjust your sharing and communication preferences.

Your information

Login/password

Privacy/communication

Privacy & communication preferences

Sharing with colleagues allows them to see your DISC® information and for you to see theirs. This enables you to compare DISC styles and explore strategies for working together.

To get the most out of your Everything DiSC® on Catalyst™ experience, we recommend that you share with colleagues.

Curious about what your colleagues can see about you? [Learn more.](#)

Share with colleagues:

On

Off

We'd love to reach out to you by email to let you know when we add new features to Catalyst. You can set your email preference here or unsubscribe via those emails at any time.

Do you want to receive emails with feature updates?

Yes

No

Navigation

Sidebar

When working in an organization, the sidebar displays your EPIC account name and available EPIC credits. Clicking the credit balance opens the EPIC account in a new browser tab. The sidebar also provides access to the organization's Learners, Departments, and Groups.

The screenshot displays the EPIC Catalyst interface. At the top, a dark blue header contains the 'EVERYTHING DiSC' logo on the left, and 'Go to Learner' with a right arrow, 'Hi Sheridan' with a user profile icon, and 'Log out' on the right.

The main content area is titled 'Learners'. It features a search bar with the placeholder text 'Search by either name or email address' and a magnifying glass icon. To the right of the search bar are two buttons: '+ Add' and 'Import'. Below the search bar is a light blue notification bar that reads 'Catalyst will check for existing learners on Catalyst and will not duplicate assignment.' with a close icon.

Below the notification bar are two buttons: 'Filter' and 'SEND REMINDER EMAIL'. To the right of these buttons is a 'UNLOCK CONTENT' button with a lock icon.

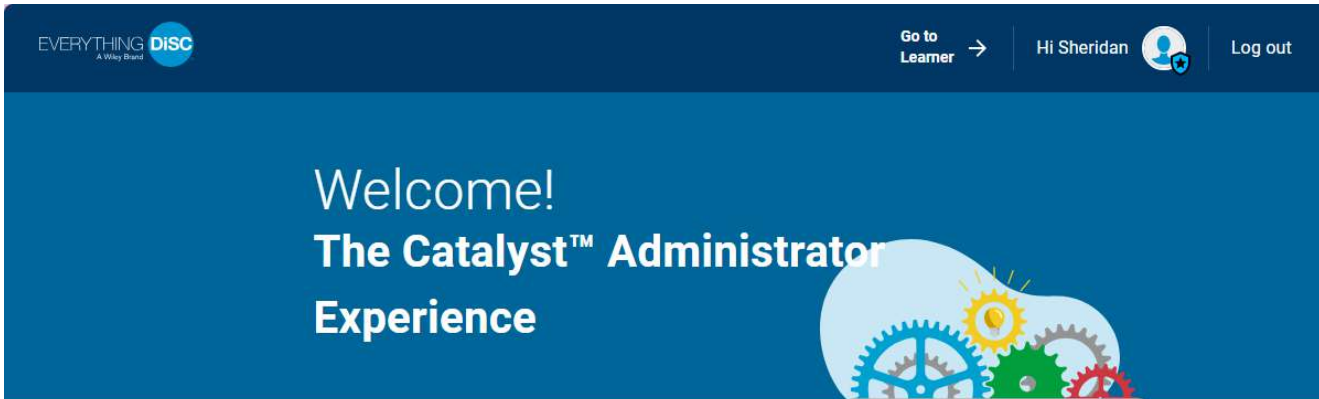
The main content area contains a table with two columns: 'Email' and 'Status'. The table has one row with the email 'ida@noemail.com' and the status 'Complete' with a green checkmark icon. Below the table is a pagination bar showing '1' in a black box.

At the bottom of the page, there is a status bar that reads '0 out of 1 learners are selected. Clear all'.

Two red boxes highlight the sidebar area. The top box highlights the sidebar content, which includes: a home icon, 'ABC Company Current Account', '753 EPIC credits' in a yellow pill, a list icon, 'ABC Company Current Organization', 'Learners' with a dropdown arrow, 'Departments', and 'Groups'. The bottom box highlights a zoomed-in view of the same sidebar content.

Accounts

After clicking the *Go to Admin* link on the header, the *Accounts* page appears for users that synchronized more than one EPIC administrator to their Catalyst Learner. Each EPIC account appears alphabetically, and you must click an account before you can begin working as a Catalyst administrator. If you have only synchronized **one** EPIC user with your Catalyst user, then you will **not** see the *Accounts* page.



Accounts

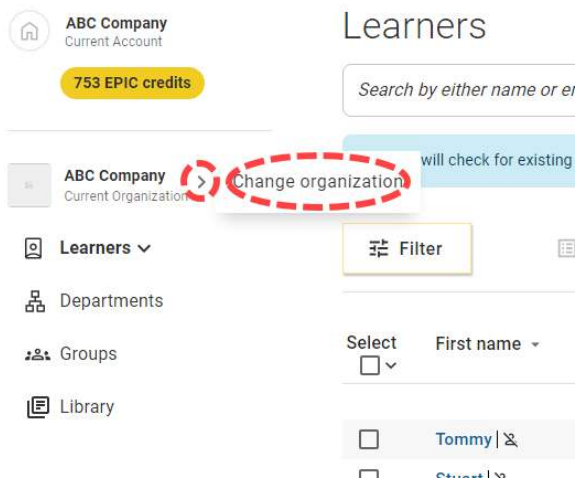
- ABC Company >
- XYZ Company >

Organizations

Before you can work with a department, learner, or group, you first must select an organization from the *Organizations* page. This page displays the different organizations associated with your Account; any organizations created on this page will also appear in the associated EPIC account and vice versa.

If you have synchronized only one EPIC user with your Catalyst user, then after clicking the *Go to Admin* link, you will automatically land on the *Organizations* page. If you manage multiple accounts, then you must first select an Account to see the associated Organizations.

If after selecting an organization you decide you need to switch to a different organization in the same Account, click the right arrow button > to the right of the organization name from the sidebar. Then click **Change organization** to return to the *Organizations* page where you can select a different organization.



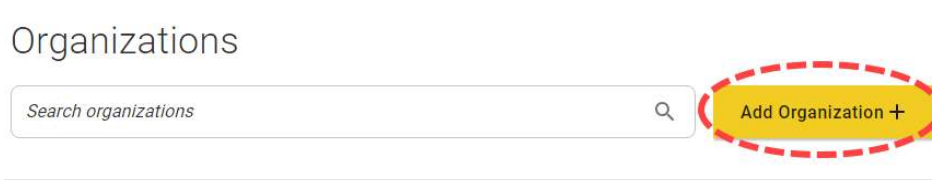
If you synchronized your Catalyst user with multiple EPIC accounts, you might need to change accounts before switching organizations. In that case, first click the “home” link to pick a new account so you can then select a different organization.



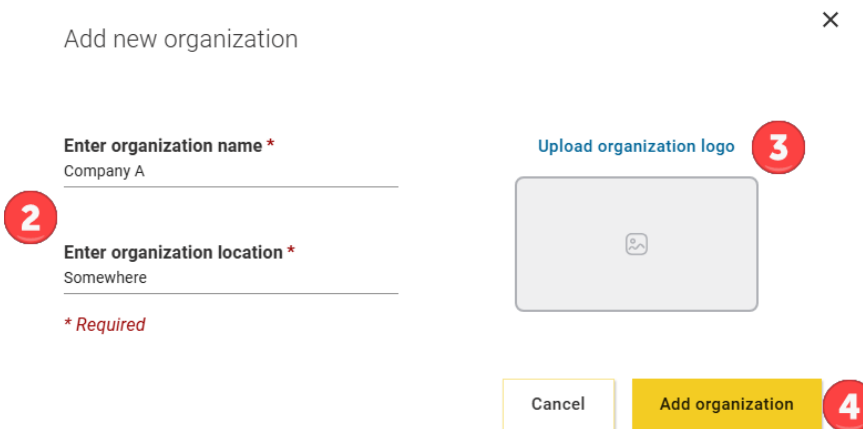
Create Organizations

If the organization you need to work with does not appear on the *Organizations* page, then you must create it.

1. From the *Organizations* page, click **Add Organization +**.



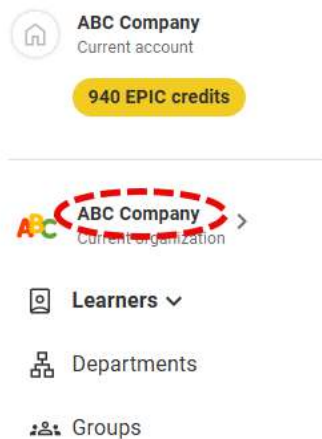
2. Enter the organization's name and location.
3. Click **Upload organization logo** to browse for an image. A logo is not required.
4. Click **Add organization**.



Update Organizations

You may change an organization's name, location, or logo at any time.

1. From the *Organizations* page, click the organization name.
2. Click the organization name from the sidebar.



3. Click the corresponding **Edit** link to update the name, logo, or location.
4. Click the corresponding **View** link to see a list of learners who have completed an assigned assessment.

ABC Company Delete Edit

Logo Edit

Location **Anytown** Edit

Organization ID **1000010** Copy

Assigned assessments in organization **2** View

Delete Organizations

You can only delete organizations if they do not have associated learners.

1. From the *Organizations* page, click the organization name.
2. Click the Organization name from the sidebar.

2 XYZ Company >
Current organization

- Learners v
- Departments
- Groups

3. Click **Delete organization**.

XYZ Company **3** Delete Edit

Logo Edit

Location **Somewhere** Edit

Organization ID **1000601** Copy

Assigned assessments in organization **0** View

Departments

Learners organize themselves into departments, but administrators can create, edit, and remove departments in addition to viewing and managing the learners in each.

Create Departments

1. From the *Organizations* page, click the organization name.
2. Click **Departments** from the sidebar.
3. Click **Add department +**.

Departments

3 Add department +

4. Enter the department name.
5. Click **Add department**.

Add new department ×

Enter department name * 4

Name

** Required*

Cancel 5 Add department

View & Update Departments

1. From the *Organizations* page, click the organization name.
2. Click **Departments** from the sidebar.
3. Click the meatball menu \dots to the right of the department.
4. Click **Edit** to change the department name.
5. Click **Transfer entire department** to move all the associated learners to a new department.

Departments

Add department +

You have 7 learner(s) not assigned to a department. Assign

| Department name | Learners in department | |
|---|------------------------|--|
| Engineering and Development | 1 | 4 3 \dots |
| Customer Service | 1 | 5 \leftarrow Edit \dots |
| Sales | 1 | \leftarrow Transfer \dots |
| Human Resources | 0 | \leftarrow Delete \dots |

Manage Learners

View Learners in a Department

1. From the *Organizations* page, click the organization name.
2. Click **Departments** from the sidebar.
3. Click the department name from the list. Learners are listed in alphabetical order by their first names.
4. To sort by last name, click the **Last name** column header.
5. Learners that are not sharing their information have a symbol to the left of their name.

Sales Delete Edit

Learners in department **4** Transfer

Search learners within this department

| First name ^ | Last name 4 | Transfer to new department | Remove from department |
|----------------|--------------------|----------------------------|------------------------|
| Ida | Exuberance | ↔ | × |
| 5 Matas | Patton | ↔ | × |
| Sheridan | Murphy | ↔ | × |

Page 1 of 1 1

Add Learners to a Department

All Learners without a Department

1. From the *Organizations* page, click the organization name.
2. Click **Departments** from the sidebar.
3. Click **Assign** to see all learners not assigned to a department.

Departments

Search departments

You have 7 learner(s) not assigned to a department. **3** Assign

4. Enter and select the department name for each learner.

Assign learners in your organization ×

Search by either name or email address Q

| Name ^ | Email | Department |
|----------------|---------------------|-----------------------------|
| Ida Exuberance | ida@noemail.com | Sales × |
| Jane Doe | janedoe774@gmail.co | 4 Customer |
| Matas Patton | matas@noemail.com | Customer Service (2 people) |

Cancel 5 Done

5. Click **Done**.

Individually from the Department

1. From the *Organizations* page, click the organization name.
2. Click **Departments** from the sidebar.
3. Click the department name from the list.
4. Click **+ Add**.

Sales Delete Edit

Learners in department 0 Transfer

Search learners within this department Q 4 + Add Import

5. Enter the name or email address of learners to select their names from the dropdown.

Add learners to Sales ×

ida Q 2

Ida Exuberance (ida@noemail.com)

6. Click **Add Learners to [department name]**.

Add learners to Sales ×

Ida Exuberance × Q

All learners in ABC Company

| Name | Email | Department | Select |
|-----------------------------------|-------|------------|--------|
| <i>There are no learners here</i> | | | |

Cancel3Add learners to Sales

7. Click **Confirm**.
8. Click **Okay**.

Individually from the Learner

You can update the department for learners that have already registered their Catalyst users.

1. From the *Organizations* page, click the organization name.
2. Click the learner's name.
3. Click **More Options**.
4. Select the department from the **Department** field.

Assigned department and groups

4

Engineering and Development (people)

Executive (people)

Human Resources (people)

Sales (people)

Groups

Reclaim unused credits

< BackSave

5. Click **Save**.

Bulk Import from the Department


You can update the department in bulk for learners that have already registered their Catalyst users.

1. From the *Organizations* page, click the organization name.
2. Click **Departments** from the sidebar.
3. Click the department name from the list.
4. Click **Import**.

- Click **Download template** to download an Excel template. Enter the learner information into the template and save.

Import learners to department




 Only Catalyst™ learners who have completed their assessment can be imported into departments.



- Drag and drop or browse to find the completed Excel file.
- Click **Import**.

Import learners to department



 Only Catalyst™ learners who have completed their assessment can be imported into departments.



- The import results are displayed.
- Click the **Download learners with errors** link to download a CSV of the individuals that were not imported.
- Click **Exit** to close the modal.

Import status

i 2 learner(s) imported successfully.
×

i 1 learners were not found in Catalyst™ or haven't completed their assessment.
×

Review errors [Download learners with errors](#)

| Email | Status |
|---------------------|---|
| shenson@noemail.com | ⚠ Not found in Catalyst™ |

Exit

Remove Learners from a Department

From the Learner

- From the *Organizations* page, click the organization name.
- Click the learner's name.
- Click the **X** beside the department name to remove the department.

LEARNER INFO
ASSESSMENT INFO

Learner information 🗑 Archive learner

First Name

Last Name

Email

Assigned department and groups

Department 3

Groups

< Back
Update learner

4. Click **Update learner**.

[LEARNER INFO](#) [ASSESSMENT INFO](#)

Learner information Archive learner

First Name: Last Name:

Email:

Assigned department and groups

Department: Groups:

[← Back](#) [Update learner](#) 4

From the Department

1. From the *Organizations* page, click the organization name.
2. Click **Departments** from the sidebar.
3. Click the department name from the list.
4. Click the **X** to remove the learner.

Sales [Delete](#) [Edit](#)

Learners in department: **2** [Transfer](#)

| First name ^ | Last name | Transfer to new department | Remove from department |
|--------------|-----------|----------------------------|--|
| Curt | Cautious | | 4 |
| Matas | Patton | | |

Page 1 of 1 **1**

5. Click **Remove** to confirm.

Transfer Learners Between Departments

All Learners from the Departments Page

Please note that once you make this transfer, you cannot undo it; the learners will be moved to the selected department, and the existing department will be removed.

1. From the *Organizations* page, click the organization name.
2. Click **Departments** from the sidebar.

3. Click the meatball menu '...' to the right of the department.
4. Click **Transfer**.

Departments

Q
Add department +

You have 7 learner(s) not assigned to a department.
Assign

| Department name | Learners in department ▾ | |
|----------------------------------|--------------------------|--|
| Sales | 5 | ... |
| Customer Service | 2 | 4 ✎ Edit ... 3 ↔ Transfer |
| Technology | 0 | 🗑 Delete ... |
| Human Resources | 0 | ... |

5. Select a department.
6. Click **Transfer entire department**.

All Learners from the Individual Department Page

Please note that once you make this transfer, you cannot undo it; the learners will be moved to the selected department, and the existing department will be removed.

1. From the *Organizations* page, click the organization name.
2. Click **Departments** from the sidebar.
3. Click the department name from the list.
4. Click **Transfer**.

Sales

Delete Edit

Learners in department 5


4 Transfer

Q
+ Add
↑ Import

5. Select a department.
6. Click **Transfer entire department**.

One Learner

1. From the *Organizations* page, click the organization name.
2. Click **Departments** from the sidebar.
3. Click the department name from the list.

- Click  to the right of the learner.


Sales

Delete Edit








Learners in department

3

Transfer

Search learners within this department 

[+ Add](#) [Import](#)


| First name | Last name | Transfer to new department | Remove from department |
|---|------------|--|---|
| Ida | Exuberance |  |  |
|  Matas | Patton |  4 |  |
| Sheridan | Murphy |  |  |

Page 1 of 1

1

- Select the new department.
- Click **Add to department**.

Transfer department

Search by department name 

| Name | Number of people in department | Select |
|---------------------|--------------------------------|--|
| Editors | 105 | <input type="checkbox"/> |
| Sales | 88 | <input type="checkbox"/> |
| Technology | 84 | <input checked="" type="checkbox"/> 5 |
| People Organization | 80 | <input type="checkbox"/> |

[Cancel](#) **6** [Add to department](#)

- Click **Transfer** to confirm.

Delete Departments

Departments can only be removed if they do not have learners. You must first transfer learners from a department to remove it.

- From the *Organizations* page, click the organization name.
- Click **Departments** from the sidebar.

3. Click the meatball menu '...' to the right of the department.
4. Click **Delete**.

Departments

[Add department +](#)

You have 7 learner(s) not assigned to a department.

[Assign](#)

| Department name | Learners in department ▾ | |
|---|--------------------------|-----|
| Sales | 5 | ... |
| Customer Service | 2 | ... |
| Technology | 0 | ... |
| Human Resources | 0 | ... |
| Executive | 0 | ... |
| Engineering and Development | 0 | ... |

Edit
Transfer
Delete

4

3

Page 1 of 1

1

Learners

Assign Catalyst to New Learners

Administrators can create Catalyst learners by entering their information one learner at a time or in bulk by uploading a comma-delimited file. All you need is each learner's name and email address. Assign all available content when creating the learner or only assign Workplace and unlock Worksmart, Management, and Agile EQ content later. Once created, the learner receives an email inviting them to complete their Catalyst assessment.

One-by-One

1. From the *Organizations* page, click the organization name.
2. Click **+ Add** from the *Learners* page.

Learners

Search by either name or email address 2

Catalyst will check for existing learners on Catalyst and will not duplicate assignment. ×

3. Enter the learner's name and email address.
4. Click **Add+**. Repeat steps 3 and 4 until all the Learners you want to create appear.
5. Click in the **Connect to Group** field to select one or more existing groups or create a new group to which you want to add the learner(s). This field is optional. However, organizing learners by groups may help you find them later.
6. Click **Add Learner**.

1 Add Learner — 2 Unlock content — 3 Summary — 4 Email Options

Add learners

3 4

5

| Name | Email | Remove |
|-------------------|---------------------|--------|
| Jonathan Fisher | JFisher@gmail.com | X |
| Izzy Davis | Izzydavis@gmail.com | X |
| Leonard Geraldine | LeoG.@wiley.com | X |
| Katherine Fogle | KFogle@wiley.com | X |
| Leonard Geraldine | LeoG.@wiley.com | X |

[← Back](#) 6

7. Select the content to unlock and click **Unlock Content**.

1 Add learners — 2 **Unlock content** — 3 Summary — 4 Email options

Current EPIC credits: 2934
 Spending credits: 75
 Remaining credits: 2859

Unlock content

Workplace REQUIRED

15 CREDITS PER USER

Workplace is the foundational DISC® experience. Through self-discovery, insights about others, and optional facilitated training, learners develop a shared language to build better relationships at work.

What's included:

- ✓ DISC® assessment
- ✓ Colleagues
- ✓ Groups
- ✓ Get advice tool
- ✓ Conversation starters
- ✓ DISCology
- ✓ Languages included: English

LANGUAGE ADD-ONS

Danish +7 credits per user

APPLICATION ADD-ONS (ENGLISH ONLY)

Management +10 credits per user ⓘ

Agile EQ +10 credits per user ⓘ

RECOMMENDED

Worksmart ○

+20 CREDITS PER USER
+10 CREDITS PER USER

Worksmart is a short-form, facilitated training and action-planning experience that helps people managers apply DISC® insights to the challenges they face every day.

What's included:

- ✓ Action planning tool
- ✓ 5 training modules:
 - Delivering constructive feedback
 - Empowering your team
 - Navigating change (Coming soon!)
 - Managing conflict (Coming soon!)
 - Motivating your team (Coming soon!)

< Back
Cancel
Unlock content 7

8. Confirm selections and click **Confirm Content**.

1 Add learners — 2 Unlock content — 3 **Summary** — 4 Email options

Current EPIC credits: 1000
 Spending credits: 75
 Remaining credits: 925

Confirm your selection

Connected group: none

| Name | Email | Workplace 15 credits | Remove |
|-------------------|---------------------|-------------------------|--------|
| Jonathan Fisher | JFisher@gmail.com | + | × |
| Izzy Davis | Izzydavis@gmail.com | + | × |
| Leonard Geraldine | LeoG@wiley.com | + | × |
| Katherine Fogle | KFogle@wiley.com | + | × |
| Mandy McGuire | MMguire@wiley.com | + | × |

< Back
Cancel
Confirm content 8

9. Edit email settings and click **Send assessments**.

1 Add learners — 2 Unlock content — 3 Summary — 4 **Email options**

Email options

Scheduling

Send invitation email: Now On selected date 03/28/2025 03:36 PM

Send reminder email: Never If not completed by

Customize invitation email

Add a custom message

Enter your custom message

0/2000

< Back Cancel Send assessments **9**

Bulk Import

Quickly assign Catalyst to new and existing learners by uploading a list of names and email addresses. Just fill out the template, upload the file, and select the content to unlock. Catalyst does the rest.

1. From the *Organizations* page, click the organization name.
2. Click **Import**.

Learners

Search by either name or email address + Add **2** ↑ Import

Catalyst will check for existing learners on Catalyst and will not duplicate assignment. ×

3. Click **Download template** to enter the learners' names and email addresses.
4. Drag and drop the file you created or click **Browse** to find the file.
5. Click **Upload file**.

1 Add learners — 2 Unlock content — 3 Summary — 4 Email options

Upload learners

[Download template](#)



You selected *Learners.xlsx*
 Supported formats: xls, xlsx, xlt, CSV
 Maximum file size: 5 MB
 File should include First name, Last name and Email in separate columns

Cancel Upload **5**

If any required information missing from the import file is displayed. Correct the errors directly on the import screen before clicking **Continue**.

1 Add learners — 2 Unlock content — 3 Summary — 4 Email options

Learner import status:

ⓘ 3 errors were found regarding learner information. You must correct all errors to continue. ✕

Review errors

| | | |
|---|-----------------------|---------------------------------------|
| First name* Mary | Last name* Rosen | Email* <small>Required</small> |
| First name* | Last name* O'Mally | Email* martin@noemail.com |
| <small>Required</small> First name* Susan | Last name* | Email* susan@noemail.com |

Cancel Continue

- Optionally, add the learners to a group. Begin entering a group name in the Connect to Group field to see the options to select an existing group or add a new group. See the [Groups](#) section of this user guide for more information on creating and using this feature.
- Click **Add Learner**.

1 Add Learner 2 Unlock content 3 Summary 4 Email Options

Add learners

First name Last name Learner email address * Add +

① Connect to Group: 7

| Name | Email | Remove |
|-------------------|--------------------|--------|
| Jonathan Fisher | JFisher@gmail.com | X |
| Izzy Davis | lzydavis@gmail.com | X |
| Leonard Geraldine | LeoG.@wiley.com | X |
| Katherine Fogle | KFogle@wiley.com | X |
| Leonard Geraldine | LeoG.@wiley.com | X |

< Back Add Learner 8

9. Select the content to unlock and click **Unlock Content**

1 Add learners — 2 **Unlock content** — 3 Summary — 4 Email options

Current EPIC credits: 2934
 Spending credits: 75
 Remaining credits: 2859

Unlock content

Workplace REQUIRED

15 CREDITS PER USER

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- ✓ Colleagues
- ✓ Groups
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- ✓ Conversation starters
- ✓ DISCology
- ✓ Languages included: English

LANGUAGE ADD-ONS

Danish +7 credits per user

APPLICATION ADD-ONS (ENGLISH ONLY)

Management +10 credits per user ⓘ

Agile EQ +10 credits per user ⓘ

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Worksmart ○

~~+20 CREDITS PER USER~~
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 - Navigating change (Coming soon!)
 - Managing conflict (Coming soon!)
 - Motivating your team (Coming soon!)

< Back Cancel **Unlock content** 9

10. Confirm selections and click **Confirm Content**.

1 Add learners — 2 Unlock content — 3 **Summary** — 4 Email options

Current EPIC credits 1000
 Spending credits 75
 Remaining credits 925

Confirm your selection

Connected group: none

| Name | Email | Workplace 15 credits | Remove |
|-------------------|---------------------|-------------------------|--------|
| Jonathan Fisher | JFisher@gmail.com | + | × |
| Izzy Davis | Izzydavis@gmail.com | + | × |
| Leonard Geraldine | LeoG.@wiley.com | + | × |
| Katherine Fogle | KFogle@wiley.com | + | × |
| Mandy McGuire | MMguire@wiley.com | + | × |

< Back Cancel **Confirm content** 10

11. Edit email settings and click **Send assessments**.

1 Add learners — 2 Unlock content — 3 Summary — 4 **Email options**

Email options

Scheduling

Send invitation email:

- Now
 On selected date

03/28/2025  03:36 PM 

Send reminder email:

- Never
 If not completed by

Customize invitation email

Add a custom message

Enter your custom message

0/2000

[< Back](#)

Cancel

Send assessments

11

Scheduled Invitations & Reminders

Invitations and reminders scheduled for the future are found on the *Scheduled invitations* page. From here administrators can edit the dates and times for the emails.

1. From the *Organizations* page, click the organization name.
2. Click **Learners** from the sidebar.
3. Click **Scheduled invitations**.

ABC Company
Current Account
4454 EPIC credits

ABC Company
Current Organization

2 Learners ^

Active learners

Archived learners

Generated reports

3 Scheduled invitations

Departments

Groups


Scheduled invitations

(UTC -5:00) ⓘ

CHANGE SEND DATE/TIME CHANGE REMINDER DATE/TIME

| Select | First name | Last name | Email | Send date | Reminder date |
|--------------------------|------------|-----------|--------------------|-------------------|-------------------|
| <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | Learner | Two | ltwo@noemail.com | 07/15/24 06:00 AM | 07/22/24 06:30 AM |
| <input type="checkbox"/> | Learner | Four | lfour@noemail.com | 07/15/24 06:00 AM | 07/22/24 06:30 AM |
| <input type="checkbox"/> | Learner | Three | lthree@noemail.com | 07/15/24 06:00 AM | 07/22/24 06:30 AM |
| <input type="checkbox"/> | Learner | One | lone@noemail.com | 07/15/24 06:00 AM | 07/22/24 06:30 AM |


Page 1 of 1

4. Click the filter icon  to filter by Groups.

Scheduled invitations

(UTC -05:00) ⓘ

CHANGE SEND DATE/TIME CHANGE REMINDER DATE/TIME

4 

Select

Currently n

Page 1 of 1

Filter

GROUPS

Enter group name to search

Group name ^ Select

- Executives
- January 2025 Training Cohort Group

Done

Change Invitation Send Date/Time

1. From the *Organizations* page, click the organization name.
2. Click **Learners** from the sidebar.
3. Click **Scheduled invitations**.
4. Select the invitations to change.
5. Click **CHANGE SEND DATE/TIME**.

ABC Company
Current Account

4454 EPIC credits

ABC Company
Current Organization

2 Learners ^

Active learners

Archived learners

Generated reports

3 Scheduled invitations

Departments

Groups

Scheduled invitations

(UTC -5:00) ⓘ

5 CHANGE SEND DATE/TIME CHANGE REMINDER DATE/TIME

| Select (0/4) | First name | Last name | Email | Send date | Reminder date |
|-------------------------------------|------------|-----------|--------------------|-------------------|-------------------|
| <input checked="" type="checkbox"/> | Learner | Two | ltwo@noemail.com | 07/15/24 06:00 AM | 07/22/24 06:30 AM |
| <input type="checkbox"/> | Learner | Four | lfour@noemail.com | 07/15/24 06:00 AM | 07/22/24 06:30 AM |
| <input type="checkbox"/> | Learner | Three | lthree@noemail.com | 07/15/24 06:00 AM | 07/22/24 06:30 AM |
| <input type="checkbox"/> | Learner | One | lone@noemail.com | 07/15/24 06:00 AM | 07/22/24 06:30 AM |

Page 1 of 1

1

6. Edit the date and/or time.
7. Click **Save Changes**.

Change Send Date

04/17/2022 03:30 PM **6**

| First name | Last name | Email | Send date |
|------------|-----------|------------------|-------------------|
| Learner | Two | ltwo@noemail.com | 07/15/24 06:00 AM |

Cancel **7** Save Changes

Change Reminder Send Date/Time

1. From the *Organizations* page, click the organization name.
2. Click **Learners** from the sidebar.
3. Click **Scheduled invitations**.
4. Select the invitations to change.
5. Click **CHANGE REMINDER DATE/TIME**.

ABC Company
Current Account
4454 EPIC credits

ABC Company
Current Organization

2 Learners ^

Active learners

Archived learners

Generated reports

3 Scheduled invitations

Departments

Groups

Scheduled invitations

(UTC -5:00) ⓘ

CHANGE SEND DATE/TIME **5** CHANGE REMINDER DATE/TIME

| Select (1/4) | First name | Last name | Email | Send date | Reminder date |
|-------------------------------------|------------|-----------|--------------------|-------------------|-------------------|
| <input checked="" type="checkbox"/> | Learner | Two | ltwo@noemail.com | 07/15/24 06:00 AM | 07/22/24 06:30 AM |
| <input type="checkbox"/> | Learner | Four | lfour@noemail.com | 07/15/24 06:00 AM | 07/22/24 06:30 AM |
| <input type="checkbox"/> | Learner | Three | lthree@noemail.com | 07/15/24 06:00 AM | 07/22/24 06:30 AM |
| <input type="checkbox"/> | Learner | One | lone@noemail.com | 07/15/24 06:00 AM | 07/22/24 06:30 AM |

Page 1 of 1

1

6. Edit the date and/or time.
7. Click **Save Changes**.

Change Send Date

04/17/2022 📅 03:30 PM ⌚ **6**

| First name | Last name | Email | Send date |
|------------|-----------|------------------|---------------------|
| Learner | Two | ltwo@noemail.com | 📅 07/15/24 06:00 AM |

Cancel **7** Save Changes

Search for Learners & Filter Search Results

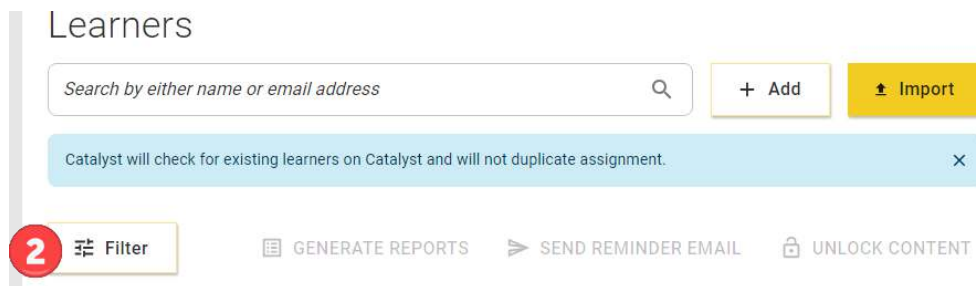
Administrators can search for learners by name or email address.

1. From the *Organizations* page, click the organization name.
2. Begin typing a name or email address to see matching learners appear.
3. Select the name.



But you can also filter your learners by assessment status, product content, groups, and departments.

1. From the *Organizations* page, click the organization name.
2. Click **Filter**.



3. Select filters:
 - a. Assessment Status – Complete or incomplete
 - b. Product Content (Locked or Unlocked) – Worksmart, Agile EQ, Management, and Danish
 - c. Groups – Search by group name
 - d. Departments – Search by department name
4. Click **Update**.

Filter learners 3×

ASSESSMENT STATUS ^

Complete

Incomplete

PRODUCT CONTENT ^

| Locked | Unlocked |
|-----------------------|----------------------------------|
| <input type="radio"/> | <input type="radio"/> Worksmart |
| <input type="radio"/> | <input type="radio"/> Agile EQ |
| <input type="radio"/> | <input type="radio"/> Management |
| <input type="radio"/> | <input type="radio"/> Danish |

GROUPS v

DEPARTMENTS v

Clear all

Update 4

Send Ad Hoc Reminders to Learners

Administrators can send reminders to one or more learners at any time from the *Learners* page.

1. From the *Organizations* page, click the organization name.
2. Search and select learners with incomplete assessments.
3. Click **SEND REMINDER EMAIL**.

Learners

Search by name or email address

🔔 Catalyst will check for existing learners and will not duplicate an existing assignment. ✕

🔍 **3** ⋮

| Select | First name | Last name | Email | Style |
|-------------------------------------|------------|-----------|-------------------------|------------|
| <input checked="" type="checkbox"/> | Ahmad | Babbage | ababbage@noemail.com | Incomplete |
| <input checked="" type="checkbox"/> | Frank | Beaseley | frank@noemail.com | Incomplete |
| <input checked="" type="checkbox"/> | Mercy | Bryant | bryant@noemail.com | Incomplete |
| <input checked="" type="checkbox"/> | Henry | Cornelius | hcorneilius@noemail.com | Incomplete |
| <input checked="" type="checkbox"/> | Abigail | Deaver | adeaver@noemail.com | Incomplete |
| <input checked="" type="checkbox"/> | Marianna | Jennings | mjennings@noemail.com | Incomplete |
| <input checked="" type="checkbox"/> | David | Langford | dlangford@noemail.com | Incomplete |
| <input checked="" type="checkbox"/> | Ruby | Law | rlaw@noemail.com | Incomplete |

4. Optionally, enter a custom message.
5. Click **Send Reminder**.

Send Reminder

Only learners who have not completed the assessment will receive a reminder email.

4 Custom message

0/2000

5

Generate Reports

Administrators can generate reports for any learner with a completed assessment. Reports can be generated from the main Learners page or from individual Learner records. Note, the Supplement for Facilitator Report can only be generated in batch for multiple learners.

Multiple Learners

1. From the *Organizations* page, click the organization name.
2. Search and select learners with completed assessments.
3. Click the meatball '...' menu above the list of learners.
4. Click **Generate reports**.

Learners

Search by name or email address

| Select | First name | Last name | Email | |
|-------------------------------------|------------|-----------|-----------------------|---|
| <input checked="" type="checkbox"/> | John | Doe | scott@noemail.com | S |
| <input checked="" type="checkbox"/> | Sherilyn | Murphy | smooreadams@gmail.com | C |
| <input checked="" type="checkbox"/> | Matas | Patton | matas@noemail.com | C |
| <input checked="" type="checkbox"/> | Simone | Tester | simone@noemail.com | C |

Page 1 of 1

4 out of 4 learners are selected. [Clear all](#)

- Select the content. Note, the Supplement for Facilitator Report can only be generated through this batch method.
- Click **Add to batch**.

×

Catalyst™ profile report

4

Workplace
 Agile EQ
 Management
 Supplement for Facilitator report

Learner list

| Name | Email | Remove from report list |
|-------------------|----------------------------|-------------------------|
| Sheridan Murphy | smooreadams@gmail.com | ✖ |
| Matas Patton | matas@noemail.com | ✖ |
| Laurel Schrementi | lschrement@wiley.com | ✖ |
| demo atest | demotest021323@noemail.com | ✖ |

5

Add to batch

Cancel

The Generated Reports page opens. It may take a few minutes to generate multiple reports.

Generated report batches

We are generating your reports now. This may take a few minutes. When complete, click each report to download to your computer. Then, find your reports in the downloads folder and unzip the file to view your reports. Some items may fail to generate.

| Report | Generation status | Size | Expires | Download |
|----------------------|-------------------|------|------------|----------|
| Report batch #398681 | ⏸ Waiting | - MB | 11/19/2024 | 📄 |

Page 1 of 1

1

- When complete, download the associated ZIP file to your computer. Each batch stays available for download from the *Generated Reports* page for seven days and will disappear after the expiration date.

🏠

ABC Company

Current Account

4439 EPIC credits

≡

ABC Company

Current Organization

👤 Learners

🏢 Departments

👥 Groups

Generated report batches

We are generating your reports now. This may take a few minutes. When complete, click each report to download to your computer. Then, find your reports in the downloads folder and unzip the file to view your reports. Some items may fail to generate.

| Report | Generation status | Size | Expires | Download |
|----------------------|------------------------------|-------|------------|---|
| Report batch #398681 | ✅ Report generation complete | 42 MB | 11/19/2024 | 📄 6 |

Page 1 of 1

1

Note, the *Generation status* column will also show if there were issues generating any reports.

✔ Report generation complete
4 items out of 10 failed to generate

✘ Report generation failed

Individual Learner

1. From the *Organizations* page, click the organization name.
2. Enter the learner's name or email to search for their record.
3. Click the learner's name from the list.
4. Click **Assessment Info**.
5. Click **Download Profile**. The file will automatically download to your computer.

LEARNER INFO ASSESSMENT INFO 4

History DOWNLOAD PROFILE REPORT 5

ASSESSMENT COMPLETED

Unlocked Catalyst Content

< Back

Unlock Additional Content for Existing Learners

Multiple Learners

Manual Method

You can unlock additional content for existing learners from the Learners page.

1. From the *Organizations* page, click the organization name.
2. Search for and select the learners.
3. Click **UNLOCK CONTENT**.

Learners

ⓘ Catalyst will check for existing learners and will not duplicate an existing assignment. ×

3

| Select | First name | Last name | Email | Style |
|-------------------------------------|------------|-----------|-----------------------|------------|
| <input checked="" type="checkbox"/> | John | Doe | scott@noemail.com | S |
| <input checked="" type="checkbox"/> | Ari ✕ | Fadal | arifadal@noemail.com | Incomplete |
| <input checked="" type="checkbox"/> | Pearl ✕ | Moore | pearl@noemail.com | Incomplete |
| <input checked="" type="checkbox"/> | Sherilyn | Murphy | smooreadams@gmail.com | C |
| <input type="checkbox"/> | Matas | Patton | matas@noemail.com | C |
| <input type="checkbox"/> | Martin ✕ | Richards | martin@noemail.com | Incomplete |
| <input type="checkbox"/> | test ✕ | test | test@test.com | Incomplete |
| <input type="checkbox"/> | test ✕ | test | test@asdf.com | Incomplete |
| <input type="checkbox"/> | test ✕ | test | test@noemail.com | Incomplete |
| <input type="checkbox"/> | Simone | Tester | simone@noemail.com | C |

4. Select the product content.
5. Click **Unlock content**.

1 Unlock content 2 Summary 3 Email options

Current EPIC credits: 2934
Spending credits: 80
Remaining credits: 2854

Unlock content

Workplace

REQUIRED

15 CREDITS PER USER

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What's included:

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- ✓ Conversation starters
- ✓ Colleagues
- ✓ DISCology
- ✓ Groups
- ✓ Languages included: English
- ✓ Get advice tool

LANGUAGE ADD-ONS

Danish +7 credits per user

APPLICATION ADD-ONS (ENGLISH ONLY)

Management +10 credits per user ⓘ

Agile EQ +10 credits per user ⓘ

Worksmart

RECOMMENDED

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+10 CREDITS PER USER

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- ✓ 5 training modules:
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 - Empowering your team
 - Navigating change (Coming soon!)
 - Managing conflict (Coming soon!)
 - Motivating your team (Coming soon!)

Cancel **Unlock content**

- A list of the learners from the file and the content you selected appears. The green + indicates the content will be unlocked. Click the red X to remove a learner from the list.
- Click **Confirm content**.

1 Unlock content ————— 2 Summary ————— 3 Email options

Confirm your selection

Current EPIC credits: 2934
 Spending credits: 80
 Remaining credits: 2854

Connected group: none

| Name | Email | Workplace 15 credits | Worksmart 10 credits | Remove |
|------------------|--------------------------|-------------------------|-------------------------|--------|
| Ursula Update | ursulaupdate@noemail.com | ✓ | + | ✗ |
| Stuart Sales | stuartsales@noemail.com | ✓ | + | ✗ |
| Stella McGraw | smcgraw@noemail.com | ✓ | + | ✗ |
| Matas Patton | matas@noemail.com | ✓ | + | ✗ |
| Martin Richards | martin@noemail.com | ✓ | + | ✗ |
| Laurel Schwimmer | laurel@noemail.com | ✓ | + | ✗ |
| Julius Sanchez | jsanchez@noemail.com | ✓ | + | ✗ |
| Emily Moore | emoore@noemail.com | ✓ | + | ✗ |

< Back Cancel Confirm content

- Enter a customer message, if desired, and click **Send**.
- Click **Done**. Emails are sent at once. Existing learners with a pending assessment get a reminder. Learners with a completed assessment receive the “add-on content” email notification.

Import Method

You can also import a list of existing learners and then request to unlock additional content. This method allows you to add a custom message to the invitation in addition to scheduling a future delivery of the invitation and reminder emails.

Warning: Use the import template provided; do not change the column headers. Verify that you have data in both columns A and B for each learner. The template will not upload if any row is missing all three pieces of learner information.

- From the *Organizations* page, click the organization name.
- Click **Import** as if you are importing a file of new learners.

Learners

Search by either name or email address

+ Add Import


Catalyst will check for existing learners on Catalyst and will not duplicate assignment. ×

3. Click **Download template**.

1 Add learners — 2 Unlock content — 3 Summary — 4 Email options

Upload learners

3 [Download template](#)



Drag & drop files or [Browse](#)

Supported formats: xls, xlsx, xltx, CSV
Maximum file size: 5 MB
File should include First name, Last name and Email in separate columns


Cancel Upload

4. Enter the names and email addresses of the **existing** learners and save.
5. Drag and drop the file you created or click **Browse** to find the file.
6. Click **Upload**.

1 Add learners — 2 Unlock content — 3 Summary — 4 Email options

Upload learners

[Download template](#)



You selected **Learners.xlsx**

Supported formats: xls, xlsx, xltx, CSV
Maximum file size: 5 MB
File should include First name, Last name and Email in separate columns

Cancel Upload 6

7. Click **Add learners**.

1 Add learners — 2 Unlock content — 3 Summary — 4 Email options

Add learners

✓ All 3 learners imported successfully. ✕

First name* Last name* Learner email address* Add +

🔍 Connect to group: 🔍

| Name | Email | Remove |
|-----------------|--------------------|--------|
| Martin Richards | martin@noemail.com | ✕ |
| Sarah DiMarco | sarah@noemail.com | ✕ |
| Ari Fadal | ari@noemail.com | ✕ |

Cancel Add learners **7**

8. Select the content to unlock.

9. Click **Unlock content**.

1 Unlock content — 2 Summary — 3 Email options

Current EPIC credits: 2934
 Spending credits: 30
 Remaining credits: 2904

Unlock content

Workplace REQUIRED

15 CREDITS PER USER

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- ✓ DISC® assessment
- ✓ Conversation starters
- ✓ Colleagues
- ✓ DIScology
- ✓ Groups
- ✓ Languages included: English
- ✓ Get advice tool

LANGUAGE ADD-ONS

Danish +7 credits per user **8**

APPLICATION ADD-ONS (ENGLISH ONLY)

Management +10 credits per user ⓘ

Agile EQ +10 credits per user ⓘ

Worksmart RECOMMENDED

✓ **8**

~~+30 CREDITS PER USER~~
 +10 CREDITS PER USER

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- ✓ 5 training modules:
 - Delivering constructive feedback
 - Empowering your team
 - Navigating change (Coming soon!)
 - Managing conflict (Coming soon!)
 - Motivating your team (Coming soon!)

Cancel Unlock content **9**

10. A list of the learners from the file and the content you selected appears. The ✓ indicates the content was previously unlocked. The green + indicates the content will be unlocked. Click the red X to remove a learner from the list.

11. Click **Confirm content**.

1 Unlock content — 2 Summary — 3 Email options

Confirm your selection

Current EPIC credits: 2934
Spending credits: 30
Remaining credits: 2904

Connected group: none

| Name | Email | Workplace 15 credits | Worksmart 10 credits | Remove |
|-----------------|-------------------------|-------------------------|-------------------------|--------|
| Henry Cornelius | hcorneilius@noemail.com | ✓ | + | X |
| Donald Barker | dbarker@noemail.com | ✓ | + | X |
| Curt Cautious | curt@noemail.com | ✓ | + | X |

< Back

Cancel

Confirm content

11

12. Enter a custom message, if desired, and click **Send**.

1 Unlock content — 2 Summary — 3 Email options

Email options

Customize invitation email

Add a custom message

Enter your custom message

0/2000

< Back

Cancel

Send

12

13. Click **Done**.

Individual Learner

1. From the *Organizations* page, click the organization name.
2. Enter the learner's name or email to search for their record.
3. Click the learner's name from the list.
4. Click the **Assessment Info** tab.
5. Click **Unlock Worksmart** to unlock Worksmart content for the learner.
6. Select application or language add-ons and click **Unlock Add-ons**.

The screenshot shows the 'Assessment Info' tab for a learner. At the top, there are two tabs: 'LEARNER INFO' and 'ASSESSMENT INFO', with a red circle containing the number '4' next to 'ASSESSMENT INFO'. Below the tabs, there is a 'History' section with a 'DOWNLOAD PROFILE REPORT' link and a dropdown menu showing 'Unlocked Catalyst Content'. The main content area is titled 'Unlock product content' and contains two sections: 'Recommended' and 'Add-ons'. The 'Recommended' section features a 'Worksmart' card with a description, a list of 5 training modules, and a yellow 'Unlock Worksmart' button with a red circle containing the number '5'. The 'Add-ons' section includes a description of Workplace, two columns of add-ons (Application and Language), and a grey 'Unlock Add-ons' button with a red circle containing the number '6'. A '< Back' link is located at the bottom left of the page.

Update Learners

Name and Email

Administrators can update a learner from the list if the learner has not completed their assessment.

1. From the *Organizations* page, click the organization name.
2. Enter the learner's name or email to search for their record.
3. Click the learner's name from the list.

4. Edit the name or email address.
5. Click **Update learner**.

LEARNER INFO ASSESSMENT INFO

Learner information 🗑️ Archive learner

4 Ahmad Babbage

ababbage@noemail.com

Assigned department and groups

2 groups X

[< Back](#) **Update learner** 5

6. After saving changes, click **Send invitation** to send a new invitation email to the learner. Or click **Not right now** to save changes without sending a new invitation email.

Success!



Learner information has been updated!
Do you want to send a new invitation?

6

Department and Groups

Learners can only be assigned to one department, but they can be a member of multiple groups. Whether or not these fields are editable on the learner's record depends on whether the learner has created their account.

1. From the *Organizations* page, click the organization name.
2. Click the learner's name or email address.
3. If editable, click in either the Department or Group fields to select a department or group. You cannot edit the Department field for Learners that have not completed their assessment.
4. Click **Update learner**.

LEARNER INFO ASSESSMENT INFO

Learner information 🗑️ Archive learner

First Name Last Name

Email

Assigned department and groups

Department **3** Groups

[< Back](#) Update learner **4**

View a Learner's History

Catalyst allows administrators to view the following activity about each learner:

- ❖ Date Catalyst was assigned
- ❖ Who Catalyst was Assigned by
- ❖ Date the assessment was completed
- ❖ Date additional content was unlocked

1. From the *Organizations* page, click the organization name.
2. Click the learner's name.
3. Click **Assessment Info**.
4. Click the **Unlocked Catalyst Content** or the **Workplace** accordion arrows in the History section to see a list of associated activities.

The screenshot shows the 'History' section of the Catalyst interface. At the top, there is a 'History' header and a 'DOWNLOAD PROFILE REPORT' link. Below the header, there is a status indicator 'ASSESSMENT COMPLETED'. The main content is divided into two sections. The first section, 'Unlocked Catalyst Content', is expanded to show 'Workplace' with a list item: '03/03/2025 Completed Workplace assessment'. The second section, 'Worksmart', is also expanded to show 'Worksmart' with a list item: '04/22/2025 Unlocked Worksmart by Simone Tester'. Red circles with the number '4' are placed over the expand/collapse arrows for both sections. Below this, there is a section titled 'Unlock product content' which contains a form with a lock icon and the text 'Add-ons'. The form describes the Workplace experience and lists two categories of add-ons: 'APPLICATION ADD-ONS (ENGLISH ONLY)' and 'LANGUAGE ADD-ONS'. Under 'APPLICATION ADD-ONS', there are two checkboxes: 'Management +10 credits per user' and 'Agile EQ +10 credits per user'. Under 'LANGUAGE ADD-ONS', there is one checkbox: 'Danish +7 credits per user'. An 'Unlock Add-ons' button is located at the bottom right of the form. A '< Back' link is visible at the bottom left of the page.

Archive Learners

Learners that have completed an assessment can be archived. Archiving a learner will remove them from their Groups and Department. Also, they will no longer be visible to other learners within their Catalyst organization. The learner will only be able to view their own profile and style information.

Individual Learner

1. From the *Organizations* page, click the organization name.
2. Enter the learner's name or email to search for their record.
3. Click the learner's name.

4. Click **Archive learner**.

LEARNER INFO ASSESSMENT INFO

Learner information Archive learner **4**

First Name: Sharon

Last Name: Moore

Email: sharon@noemail.com

Assigned department and groups

Department: Sales X

Groups:

[< Back](#) Update learner

5. Click **Archive**.

Archive learner

Archiving a learner will remove them from their Groups, Department and they will no longer be visible to other learners within the Catalyst organization. **This learner will only be able to view their own profile and style information.**



Do you wish to archive this learner?

Cancel Archive **5**

Multiple Learners

1. From the *Organizations* page, click the organization name.
2. Search and select learners with completed assessments.
3. Click the meatball menu '⋮' above the list of learners.
4. Click **Archive learners**.

Learners

Search by name or email address

i Catalyst will check for existing learners and will not duplicate an existing assignment.

3

| Select <input type="checkbox"/> | First name | Last name ^ | Email | Style |
|-------------------------------------|---|-------------|-----------------------|------------|
| <input checked="" type="checkbox"/> | John | Doe | scott@noemail.com | S |
| <input checked="" type="checkbox"/> | Ari <input type="button" value="X"/> | Fadal | arifadal@noemail.com | Incomplete |
| <input checked="" type="checkbox"/> | Pearl <input type="button" value="X"/> | Moore | pearl@noemail.com | Incomplete |
| <input checked="" type="checkbox"/> | Sherilyn | Murphy | smooreadams@gmail.com | C |
| <input type="checkbox"/> | Matas | Patton | matas@noemail.com | C |
| <input type="checkbox"/> | Martin <input type="button" value="X"/> | Richards | martin@noemail.com | Incomplete |
| <input type="checkbox"/> | test <input type="button" value="X"/> | test | test@test.com | Incomplete |
| <input type="checkbox"/> | test <input type="button" value="X"/> | test | test@asdf.com | Incomplete |
| <input type="checkbox"/> | test <input type="button" value="X"/> | test | test@noemail.com | Incomplete |
| <input type="checkbox"/> | Simone | Tester | simone@noemail.com | C |

5. Click **Archive**.

Archive learners

Archiving these learners will remove them from their Groups, Department and they will no longer be visible to other learners within the Catalyst organization.



Do you wish to archive these learners?

5

Reactivate Archived Learners

Archived learners can be reactivated at any time.

Multiple Learners

1. From the *Organizations* page, click the organization name.
2. Click **Learners** from the sidebar.
3. Click **Archived Learners**.
4. Select one or more learners to reactivate.
5. Click **Reactivate**.

ABC Company
Current Account
4204 EPIC credits

ABC Company
Current Organization

2 Learners ^

Active learners

3 Archived learners

Generated reports

Scheduled invitations

Departments

Groups

Archived learners

Search by either name or email address

Filter

5 REACTIVATE GENERATE REPORTS

| Select | First name | Last name | Email | Style |
|-------------------------------------|------------|-----------|----------------------------|-------|
| <input checked="" type="checkbox"/> | Matas ↕ | Patton | matas@noemail.com | C |
| <input type="checkbox"/> | demo | atest | demotest021323@noemail.com | C |

Page 1 of 1

1

1 out of 2 learners are selected. Clear all

Individual Learner

1. From the *Organizations* page, click the organization name.
2. Enter the learner's name or email to search for their record.
3. Click the learner's name.
4. Click **Reactivate learner**.

LEARNER INFO ASSESSMENT INFO

Learner information

Reactivate learner 4

First Name
Sharon

Last Name
Moore

Email
sharon@noemail.com

Assigned department and groups

Department

Groups

< Back

Update learner

14. Click **Activate**.

Reactivate learner

Reactivating a learner will make them visible to other learners in the Catalyst organization.
You will need to add them to a department and groups, if needed.



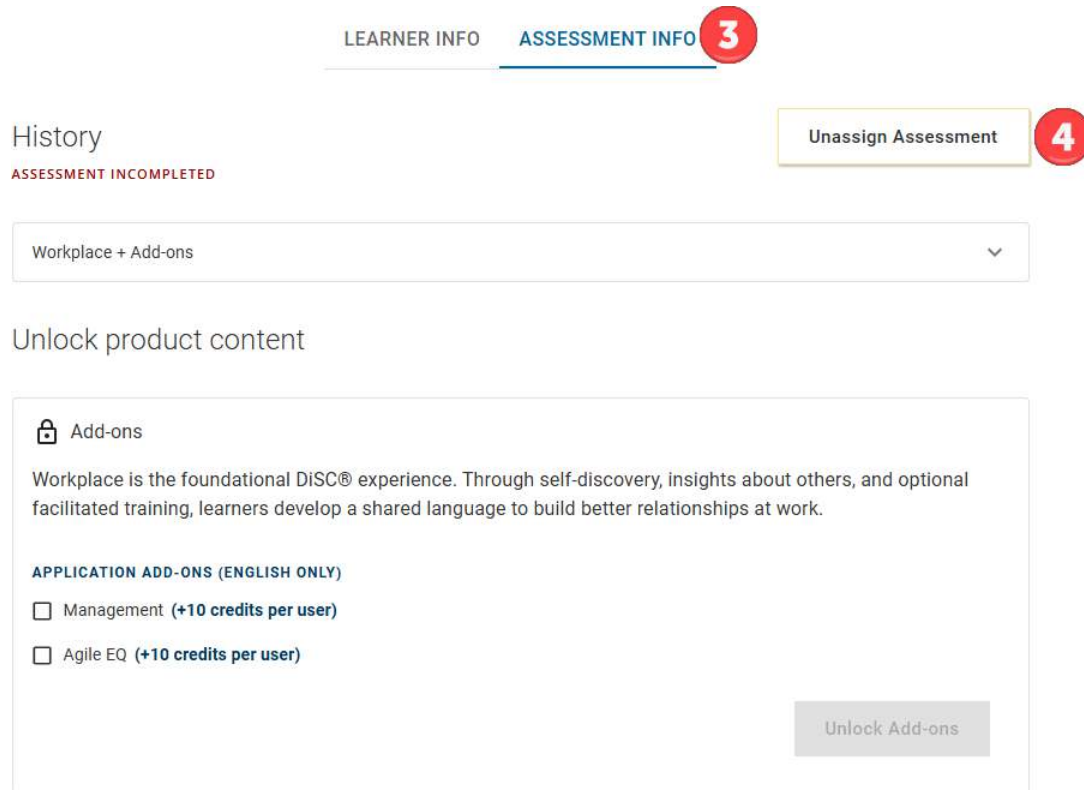
Do you wish to activate this learner?



Unassign Assessments

Administrators can unassign assessments for learners with an incomplete assessment.

1. From the *Organizations* page, click the organization name.
2. Click the learner's name.
3. Click **Assessment Info**.
4. Click **Unassign Assessment**.




LEARNER INFO **ASSESSMENT INFO 3**

History **Unassign Assessment 4**

ASSESSMENT INCOMPLETED

Workplace + Add-ons

Unlock product content

 Add-ons

Workplace is the foundational DISC® experience. Through self-discovery, insights about others, and optional facilitated training, learners develop a shared language to build better relationships at work.

APPLICATION ADD-ONS (ENGLISH ONLY)

Management (+10 credits per user)

Agile EQ (+10 credits per user)

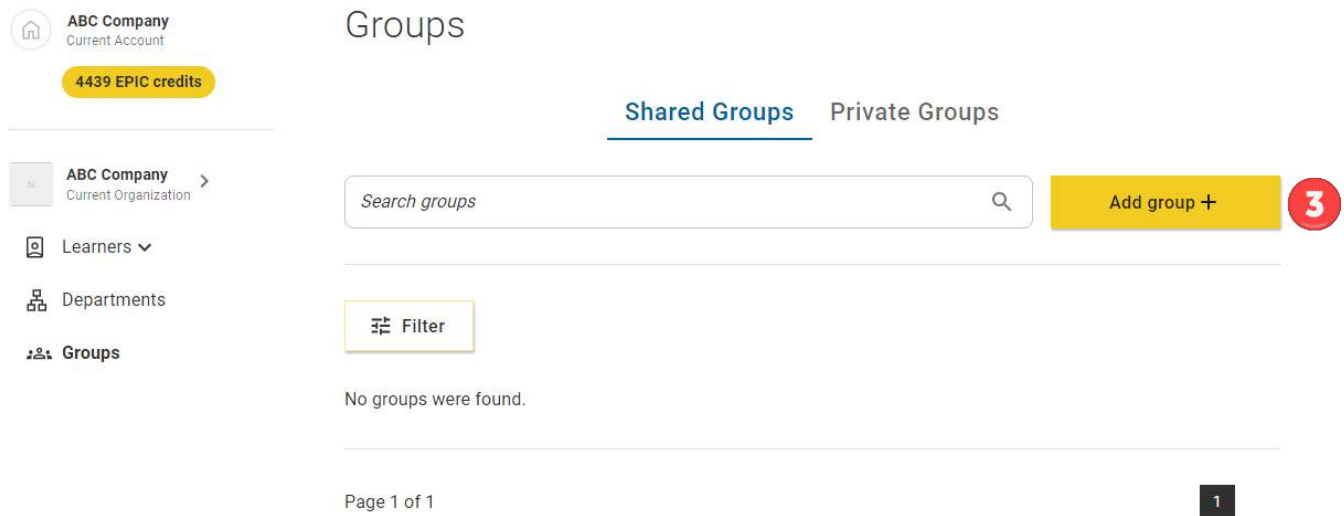
Unlock Add-ons

Groups

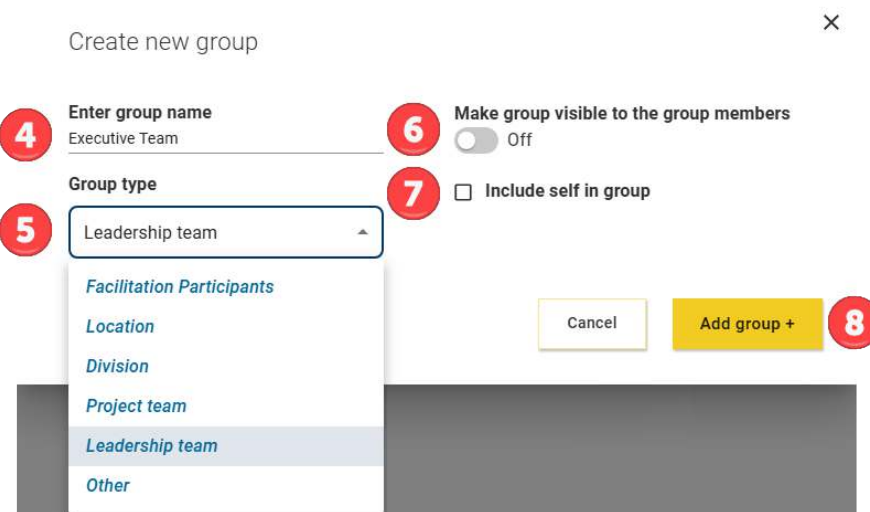
Administrators can create shared groups of learners that allow group members to see each other after completing their assessments. Administrators can also create private groups that are only available in the administrator experience. Private groups allow admins to organize learners for quicker retrieval later.

Create Groups

1. From the *Organizations* page, click the organization name.
2. Click **Groups** from the sidebar.
3. Click **Add group**.



4. Enter the group name.
5. Select the group type.
6. Select the visibility option for individual group members. You can change this setting at any time.
7. Select whether to include yourself in the group.
8. Click **Add group**. The next step is to add group members to the group.



Manage Group Members

You may add up to five hundred people to a group. Note learners set to “Not shared with colleagues” will not appear in groups shared with learners but will remain in the group and visible to admins for this organization.

You can add people to a group one-by-one, in bulk, or you can even upload an import file.

Add People Individually

1. Click **+ Add** to access learners that belong to this organization.

August 2024 Workplace

Delete Edit

Facilitation Participants

Learners in group 0

Download group map

Download CSV

Search learners within this group

1 + Add

Import

2. Enter the name or email address of learners to select their names from the dropdown.

Add learners to August 2024 Workplace

ida

Ida Exuberance (ida@noemail.com) 2

Name Email Department (Unselect all)

3. Click **Add learners to [group name]**.

Add learners to August 2024 Workplace

Ida Exuberance X

Name Email Department Select (Unselect all)

There are no learners here

Cancel 3 Add learners to August 2024 Workplace

4. Click **Okay**.

Bulk Import

If you need to add a large quantity of learners to a group, importing a list of names and email addresses may prove a more efficient process.

1. Click **Import**.

August 2024 Workplace

Delete Edit

Facilitation Participants

Learners in group 0

Download group map

Download CSV

Search learners within this group



+ Add 1

Import

2. Click **Download template**.

Upload group through Excel



2

Download template



Drag & drop files or [Browse](#)

Supported formats: xls,xlsx,CSV
Maximum file size: 5 MB

Please add Email to column A, and Name to column B

Upload file

Back

3. Enter the names and email addresses of the learners to add to the group and save.

4. Drag and drop the file you created or click **Browse** to find the file.

5. Click **Upload file**.

Upload group through Excel



Download template



4

Drag & drop files or [Browse](#)

Supported formats: xls,xlsx,CSV
Maximum file size: 5 MB

Please add Email to column A, and Name to column B

Upload file

5

Back

- Click **X** to remove a learner from the group.
- Click Edit to change the group's visibility, name, or type.

August 2024 Workplace

Delete Edit **7**

Facilitation Participants

Learners in group 3 Download group map

Download CSV

+ Add Import

| First name | Last name | Email | Remove from group |
|------------|------------|-------------------|-------------------|
| Ida | Exuberance | ida@noemail.com | X |
| Matas | Patton | matas@noemail.com | 6 X |
| Sheridan | Murphy | | X |

Page 1 of 1 1

Download Group Information

Group Map Image

You can download a PNG image of the group's DiSC map. All learners with a shared profile will appear on the group map.

- From the *Organizations* page, click the organization name.
- Click **Groups** from the sidebar.
- Select the tab: Shared Groups or Private Groups.
- Click the group name.

Groups

Shared Groups Private Groups **3**

Add group +

Filter

August 2024 Workplace **4**

Page 1 of 1 1

5. Click **Download group map**.

August 2024 Workplace

Delete Edit

Facilitation Participants

Learners in group 3

5 Download group map

Download CSV

Group Map List

You can download a CSV file containing each group member's name, email address, DiSC style, and Workplace Extra Priorities.

1. From the *Organizations* page, click the organization name.
2. Click **Groups** from the sidebar.
3. Select the tab: Shared Groups or Private Groups.
4. Click the group name
5. Click **Download CSV**.

August 2024 Workplace

Delete Edit

Facilitation Participants

Learners in group 3

Download group map

5 Download CSV

Delete Groups

1. From the *Organizations* page, click the organization name.
2. Click **Groups** from the sidebar.
3. Select the tab: Shared Groups or Private Groups.
4. Click the meatball menu '...' to the right of the group.
5. Click **Delete**.

Groups

Shared Groups Private Groups

Search groups

Add group +

Filter

August 2024 Workplace

Ida Exuberance Matias Patton Sheridan Murphy

4 ...

5 Edit Delete