EVERYTHING DiSC
A Wiley Brand

Catalyst™

Catalyst Administrator Experience

Managing organizations, learners, departments, and groups

Last updated: May 28, 2025

INTEGRIS
PERFORMANCE ADVISORS

Contents

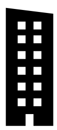
Overview

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.

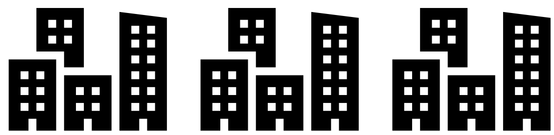
Accounts in Catalyst refer to EPIC primary and sub accounts that store credits. Administrators who have synchronized their single Catalyst user with multiple EPIC administrators have access to an *Accounts* page in Catalyst. The *Accounts* page acts as a home page for administrators with multiple EPIC 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



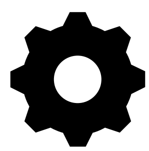
Everything DiSC® Authorized Partner
working with multiple organizations



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.

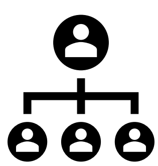
Learner

Administrator

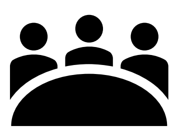


Departments and **Groups** offer ways for users to bring meaning to and organize multiple learners. Each organization has its own set of Departments which help find learners on the *Your Colleagues* page. Groups of learners can be created to further represent interdepartmental and cross-functional teams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

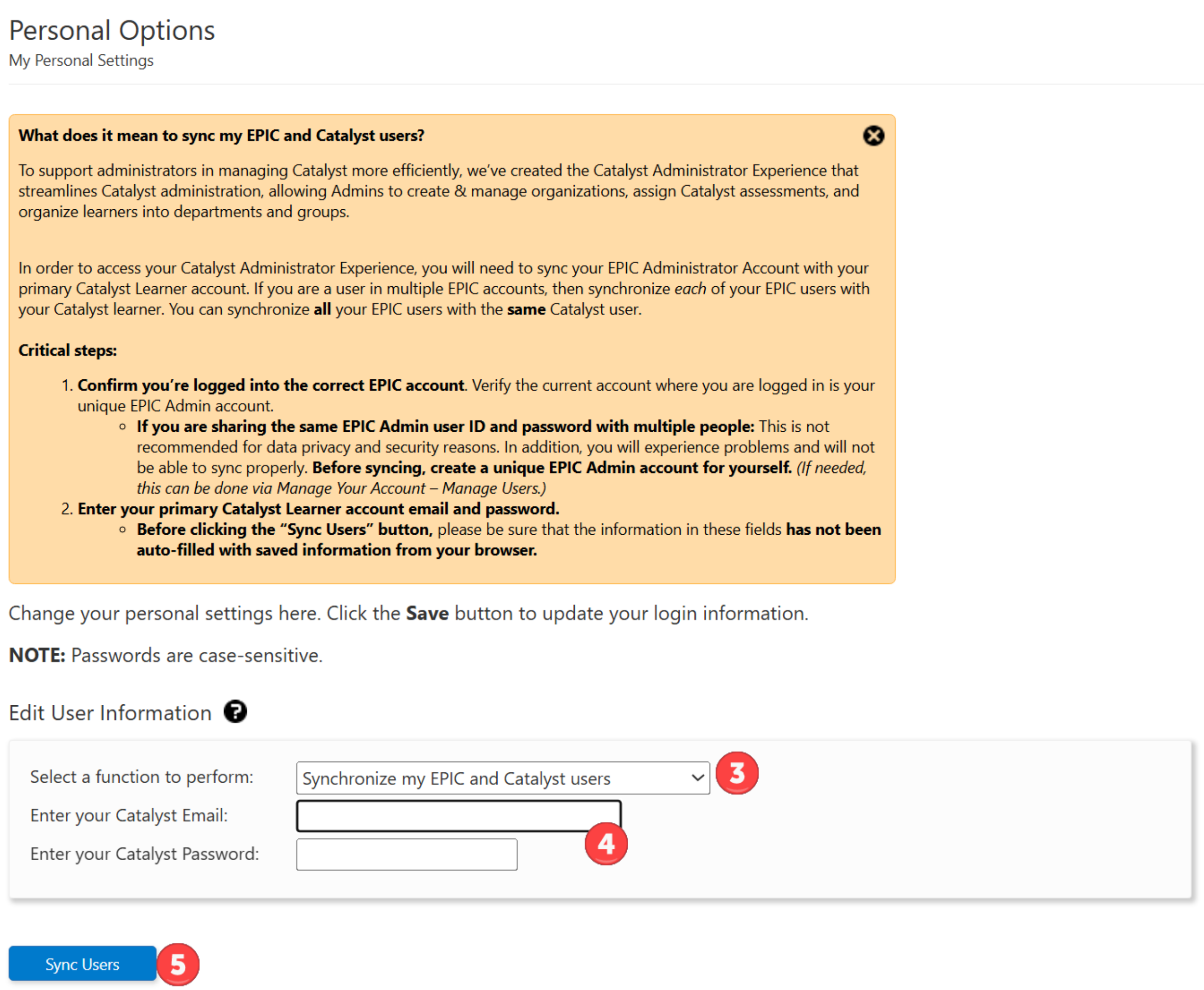
User Synchronization

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.

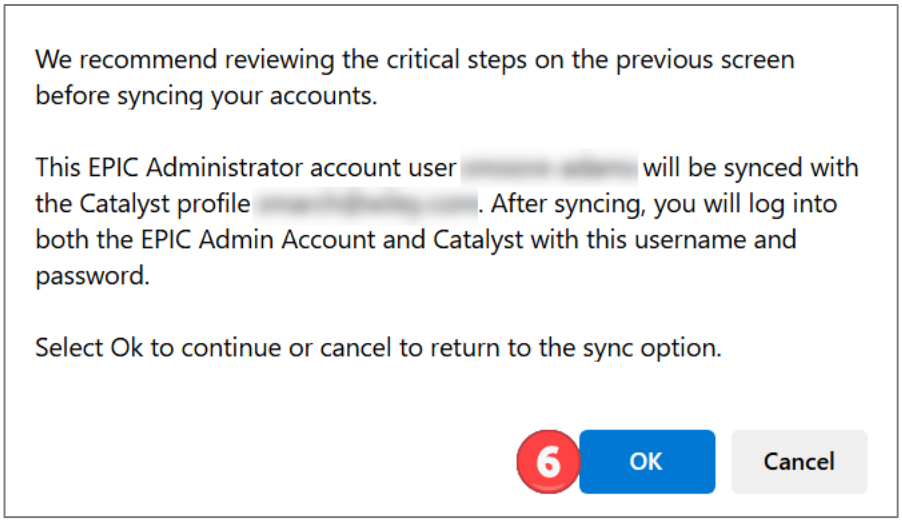
1. Log into EPIC at **admin.wiley-epic.com**.
2. Click **Personal Options** and select **My Personal Settings**.
3. Select **Synchronize my EPIC and Catalyst users** from the dropdown.
4. Enter your Catalyst **email address** and **password**.

   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**.

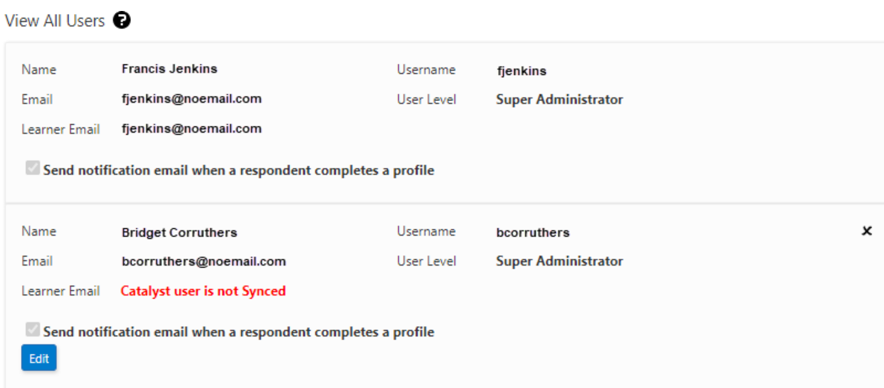


6. Click **OK** after carefully reading the warning.



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

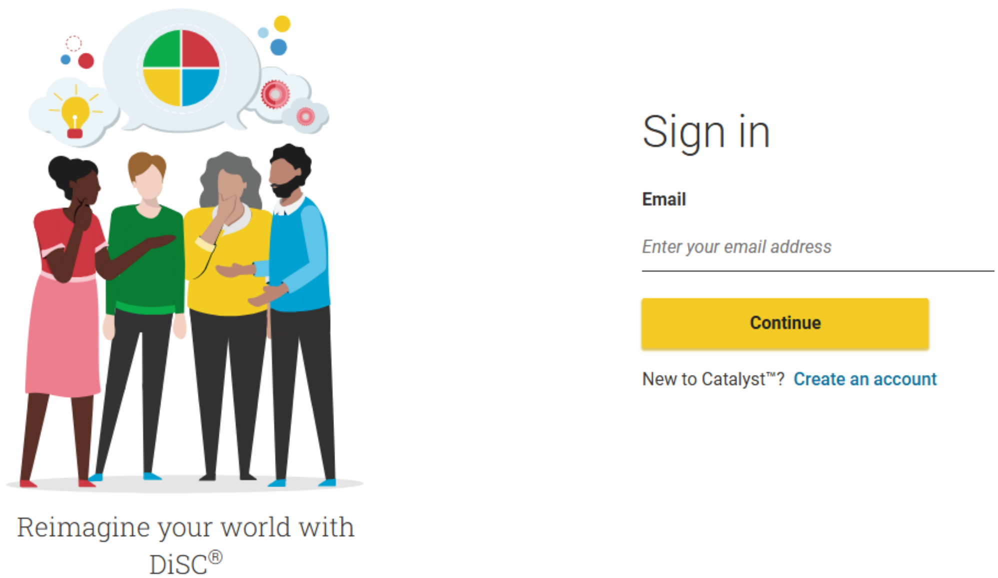
Review which administrators in your EPIC account have synchronized their users from the *Manage Your Account* > *Manage Users* page. An email address in the *Learner Email* field shows a synchronized user. Unlinked users display "Catalyst user is not Synced" in the field.



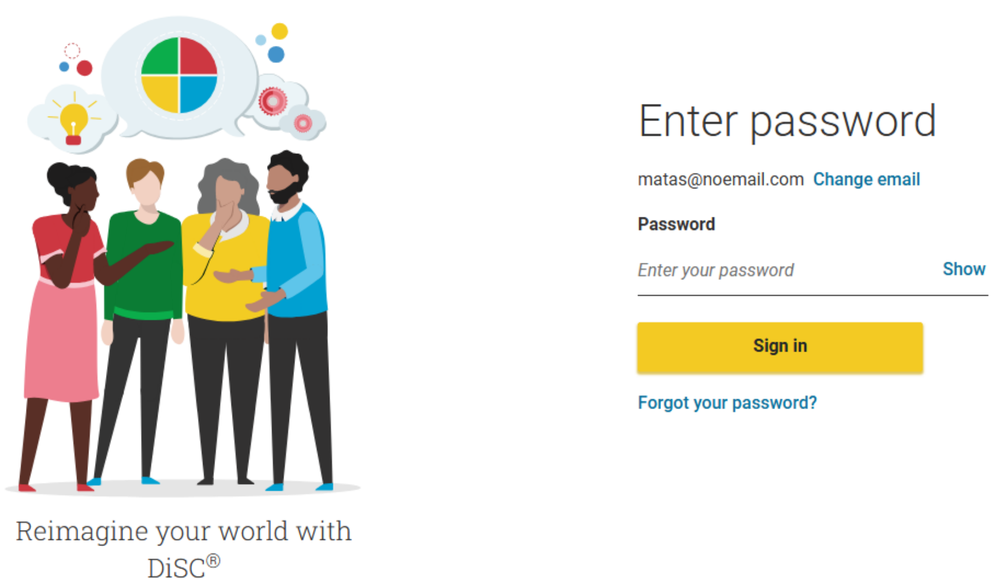
Login

Catalyst learners and administrators log into Catalyst the same way.

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



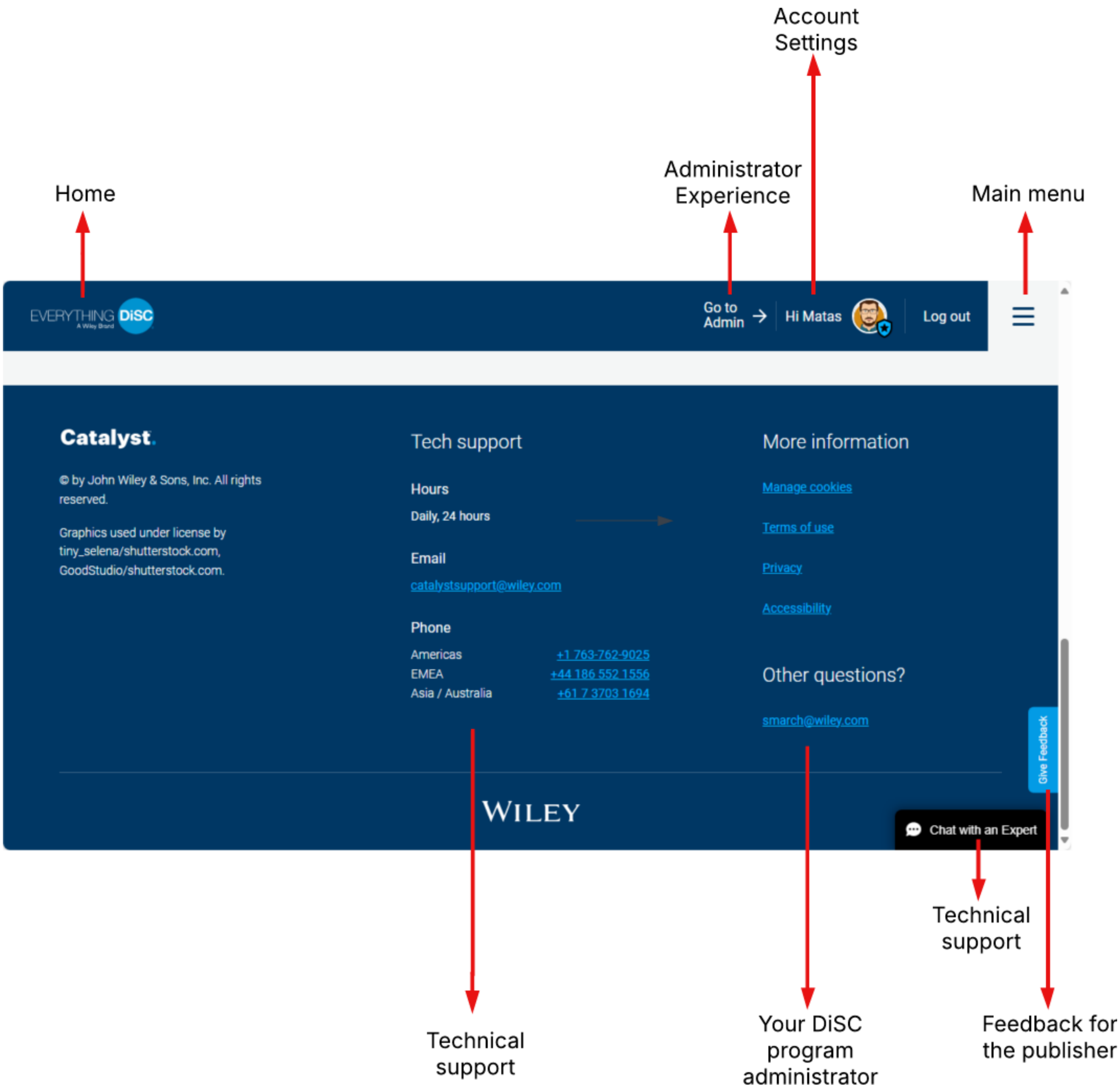
3. Enter your password and click **Sign in**. Click **Change email** to change or edit your email address – in case of a typo or wrong address. Click **Forgot your password** to receive a password reset link.



Common Components

Header and Footer

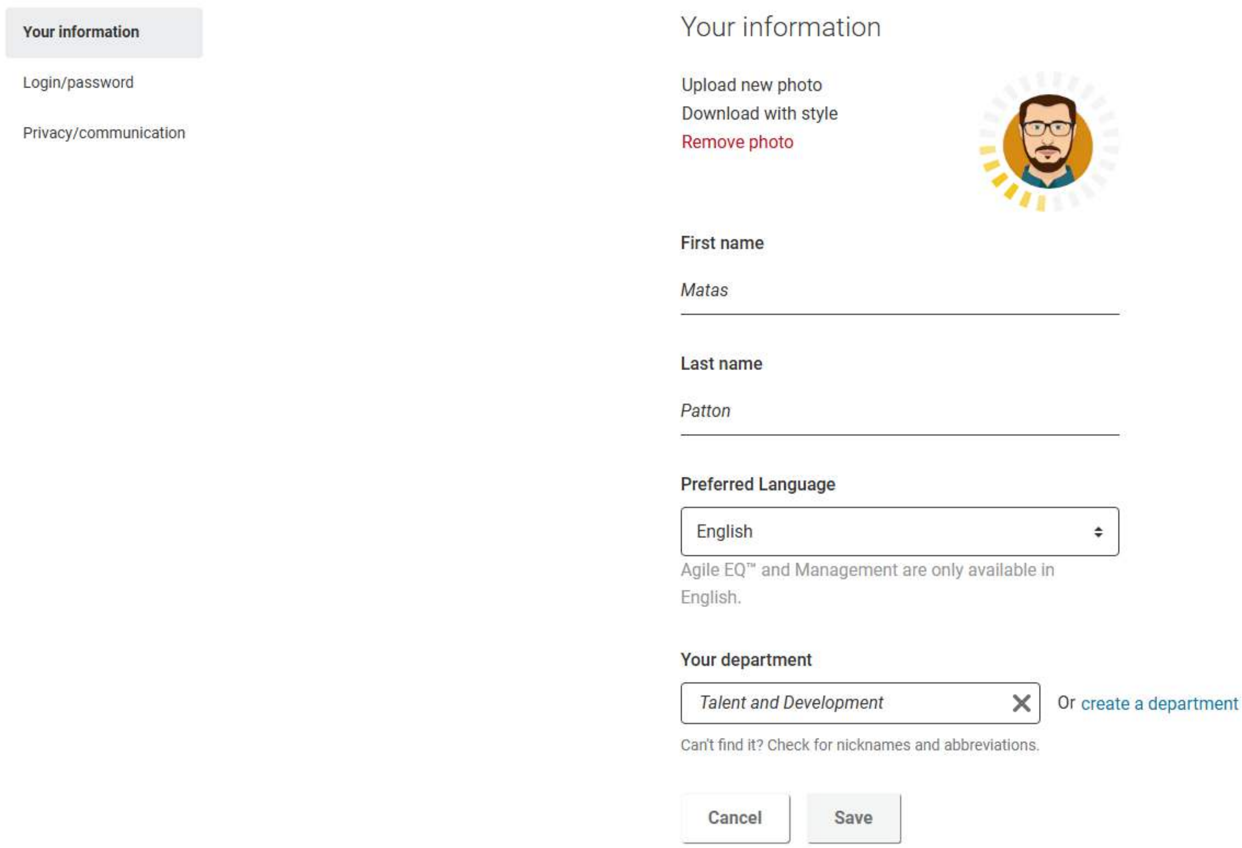
The persistent Catalyst header provides navigation and support.



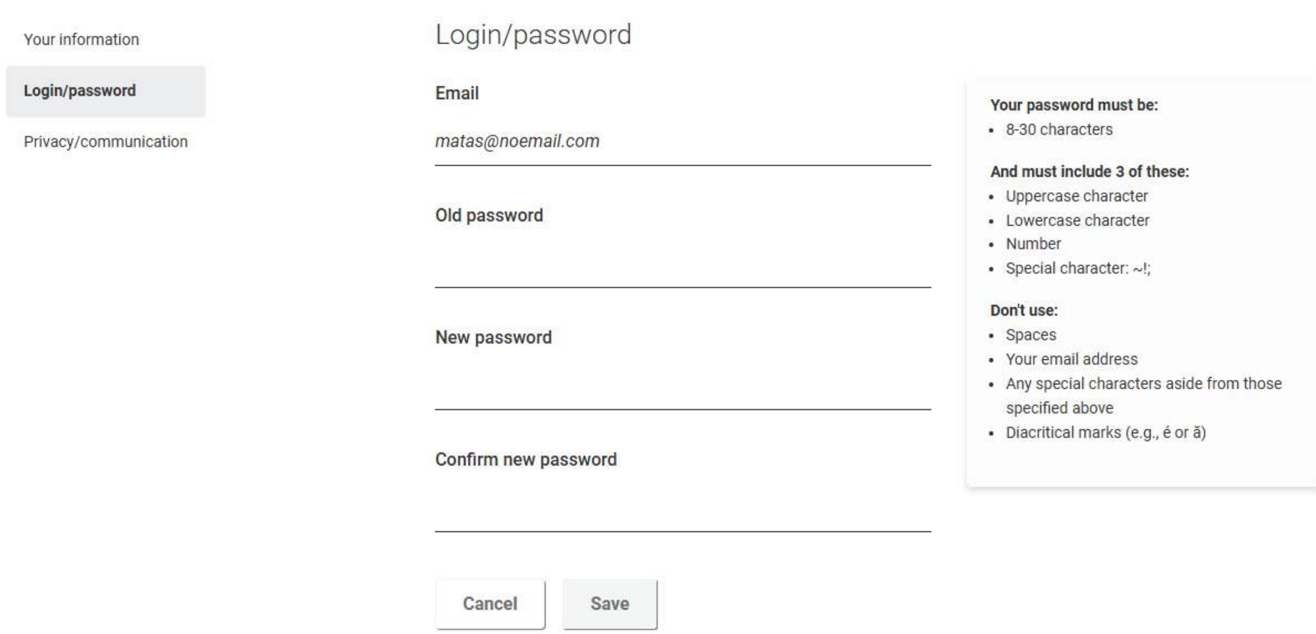
Account Settings

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.

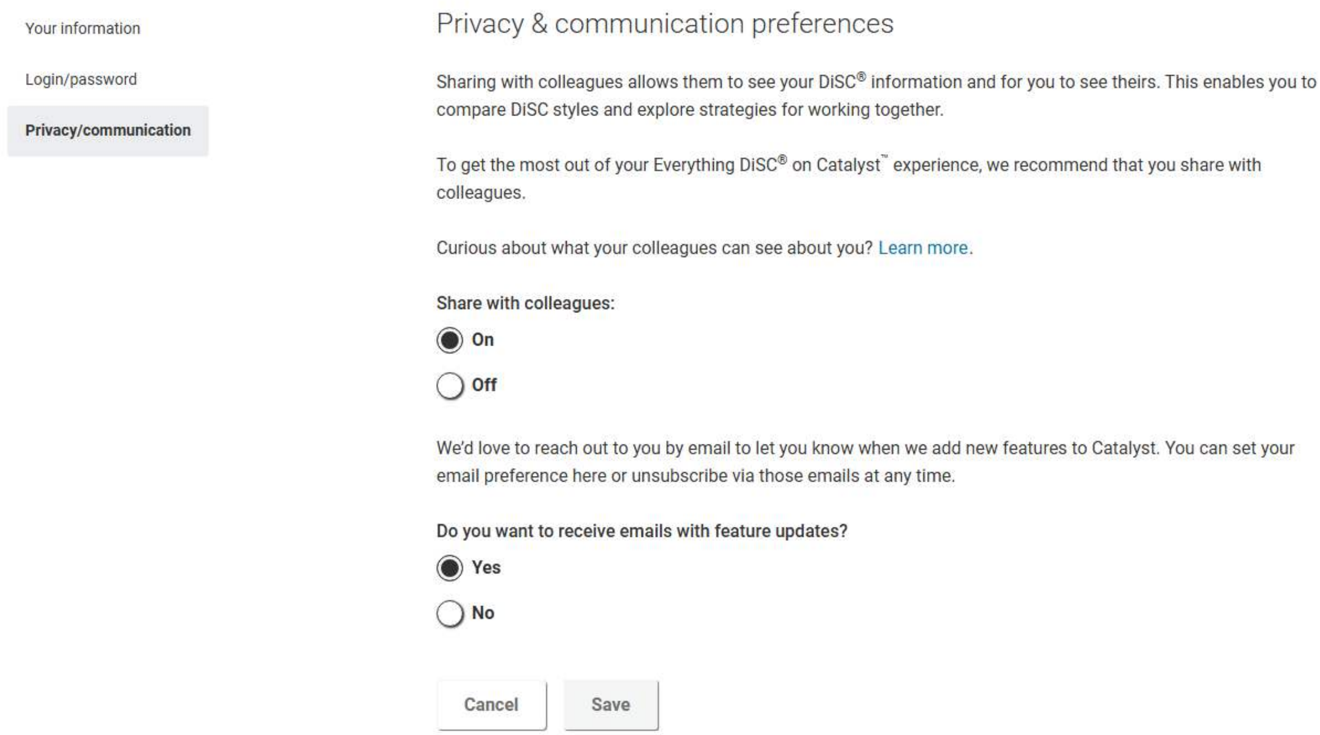
1. Click **Hi...** in the header to open your Catalyst user's account information.
2. **Your information** stores your photo, name, language, and department.



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



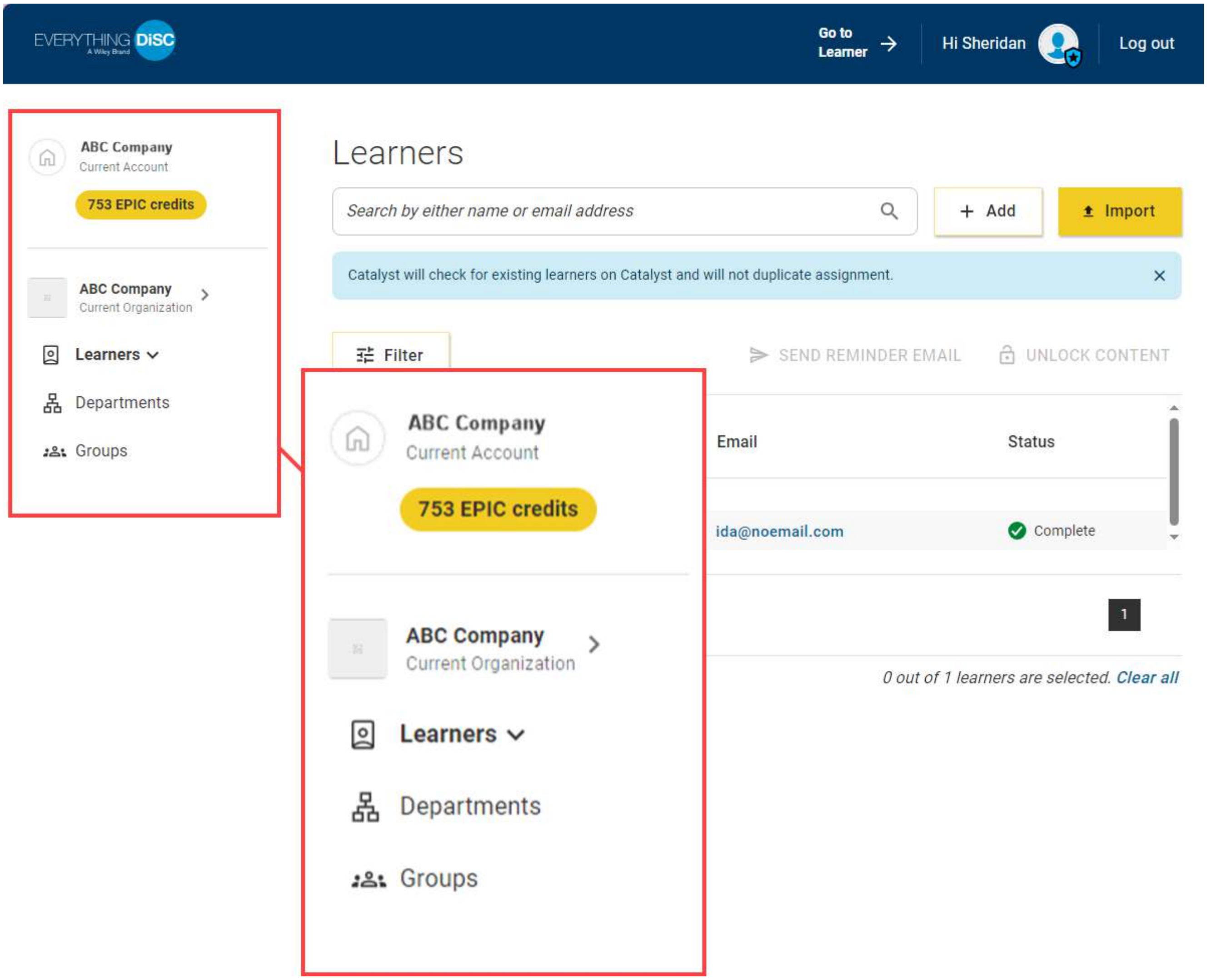
4. Click the **Privacy/communication** tab to adjust your sharing and communication preferences.



Navigation

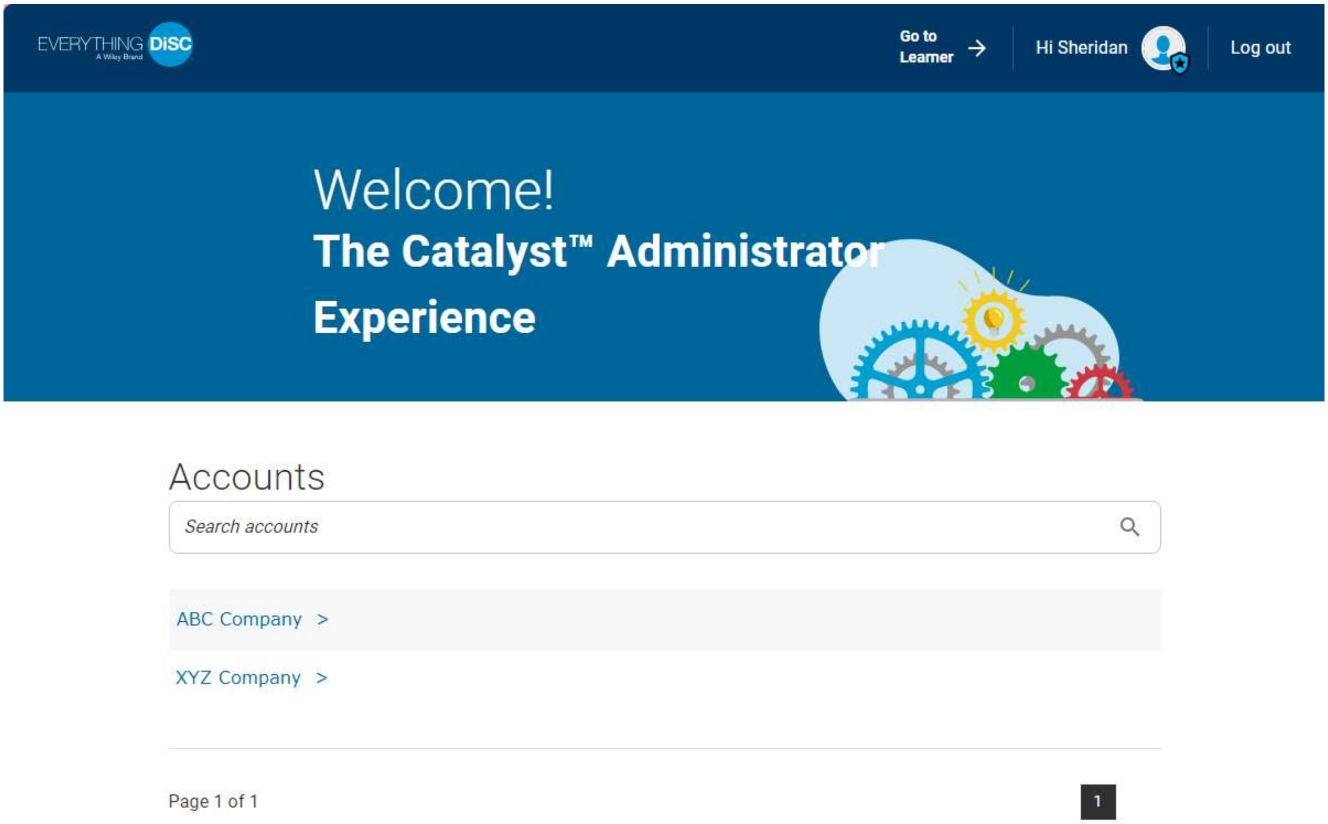
Sidebar

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.



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.

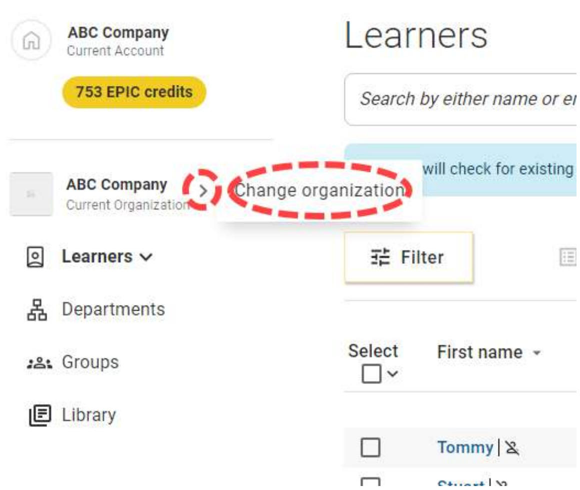


Organizations

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.

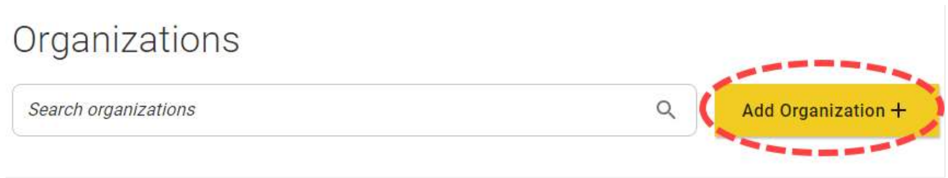


If you synchronized your Catalyst user with multiple EPIC accounts, you might need to change accounts before switching organizations. In that case, first click the “home” link to pick a new account so you can then select a different organization.

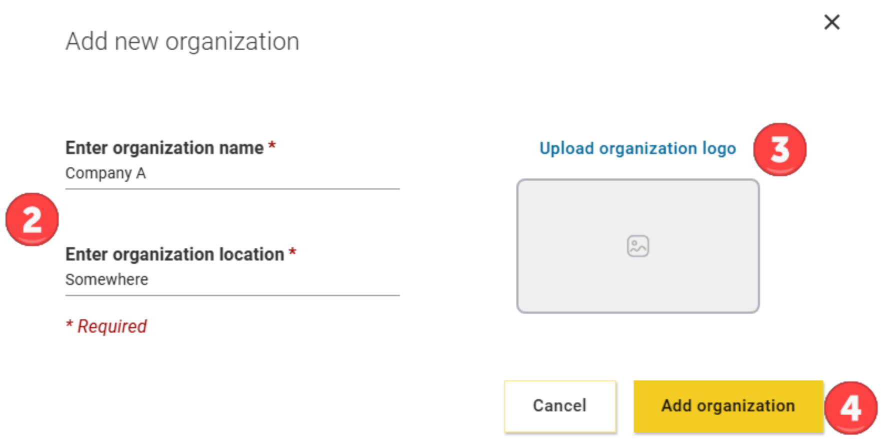
Create Organizations

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 +**.



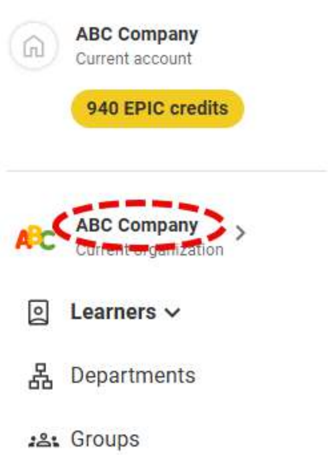
2. Enter the organization's name and location.
3. Click **Upload organization logo** to browse for an image. A logo is not required.
4. Click **Add organization**.



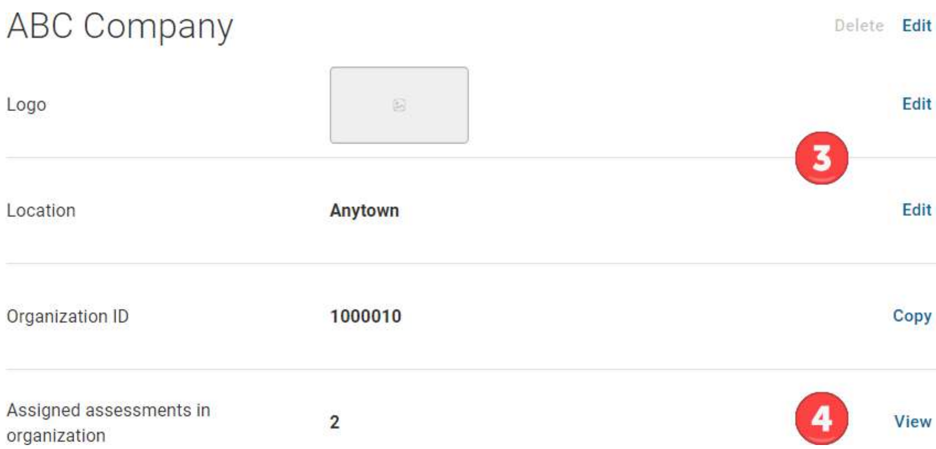
Update Organizations

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.



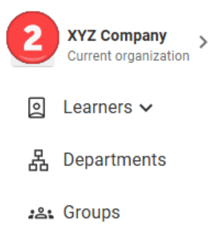
3. Click the corresponding **Edit** link to update the name, logo, or location.
4. Click the corresponding **View** link to see a list of learners who have completed an assigned assessment.



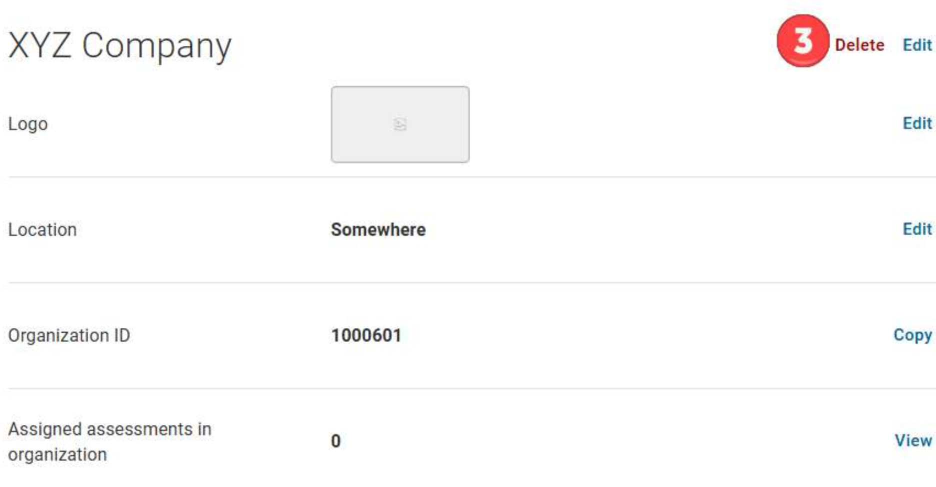
Delete Organizations

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.



3. Click **Delete organization**.



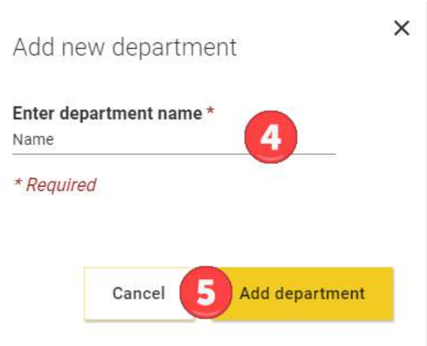
Departments

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

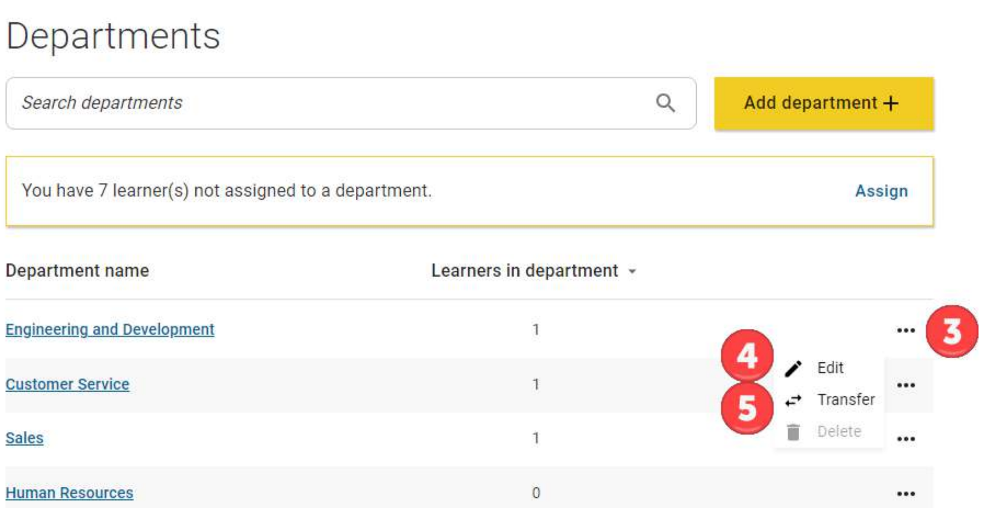
1. From the *Organizations* page, click the organization name.
2. Click **Departments** from the sidebar.
3. Click **Add department +**.

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



View & Update Departments

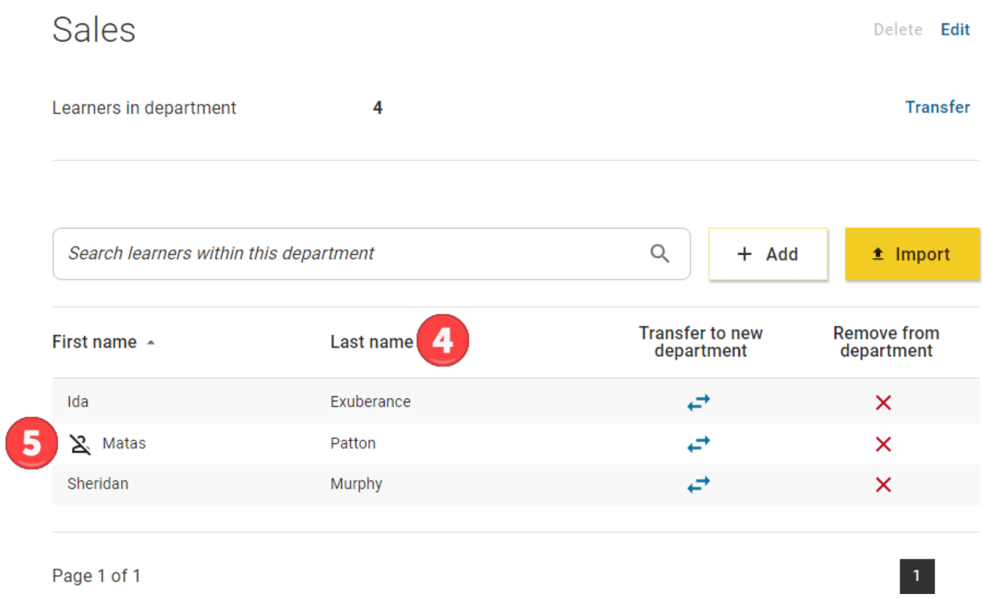
1. From the *Organizations* page, click the organization name.
2. Click **Departments** from the sidebar.
3. Click the meatball menu ··· to the right of the department.
4. Click **Edit** to change the department name.
5. Click **Transfer entire department** to move all the associated learners to a new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



Manage Learners

View Learners in a Department

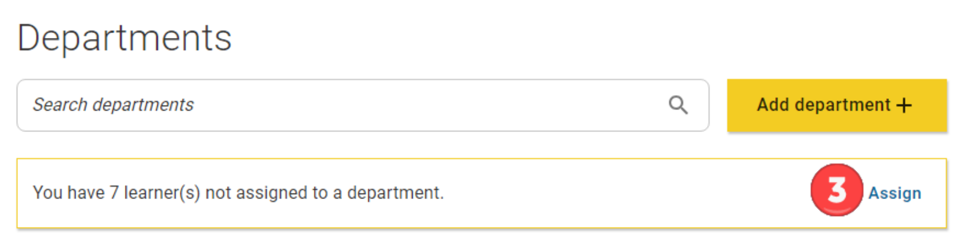
1. From the *Organizations* page, click the organization name.
2. Click **Departments** from the sidebar.
3. Click the department name from the list. Learners are listed in alphabetical order by their first names.
4. To sort by last name, click the **Last name** column header.
5. Learners that are not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



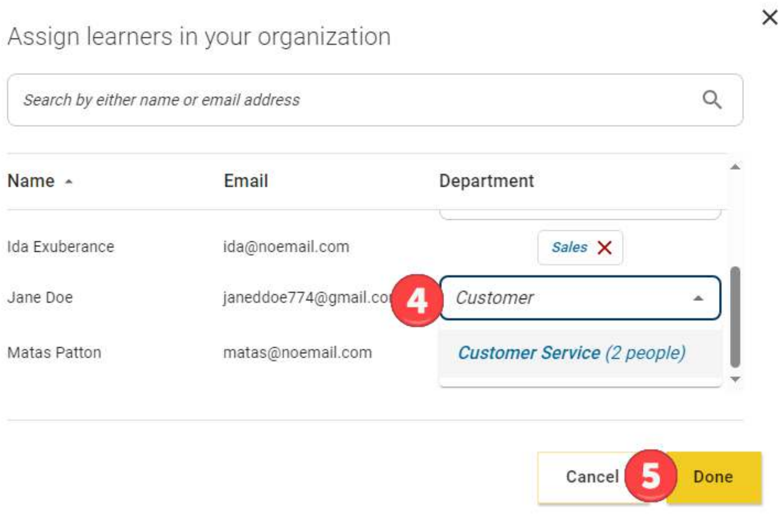
Add Learners to a Department

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.



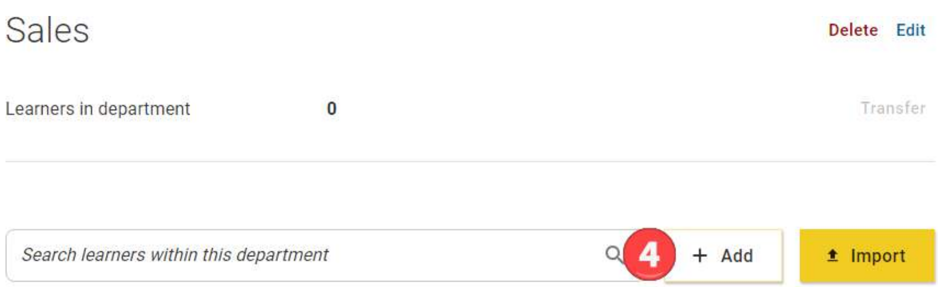
4. Enter and select the department name for each learner.



5. Click **Done**.

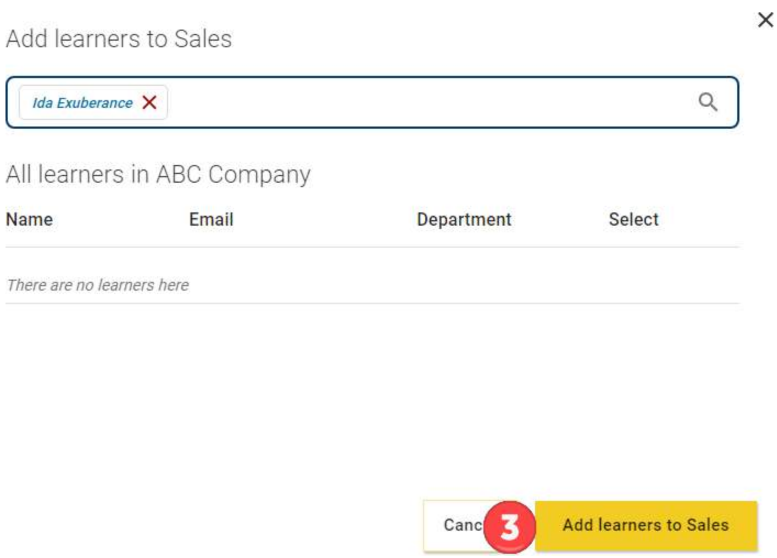
Individually from the Department

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**.



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

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

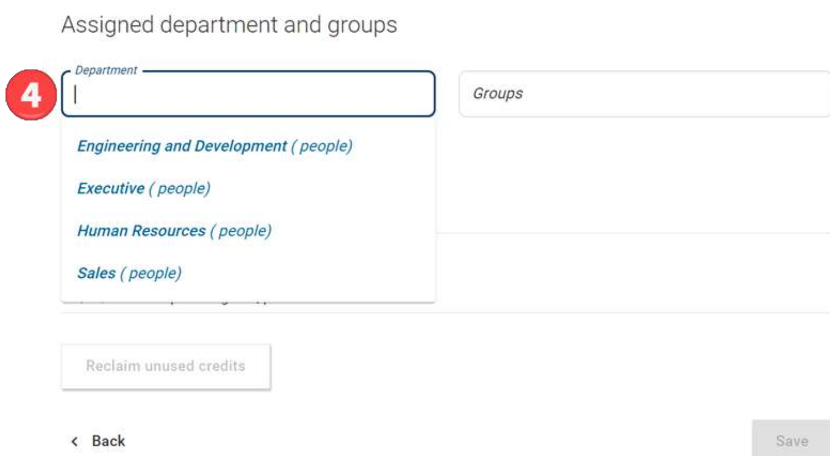


7. Click **Confirm**.
8. Click **Okay**.

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.



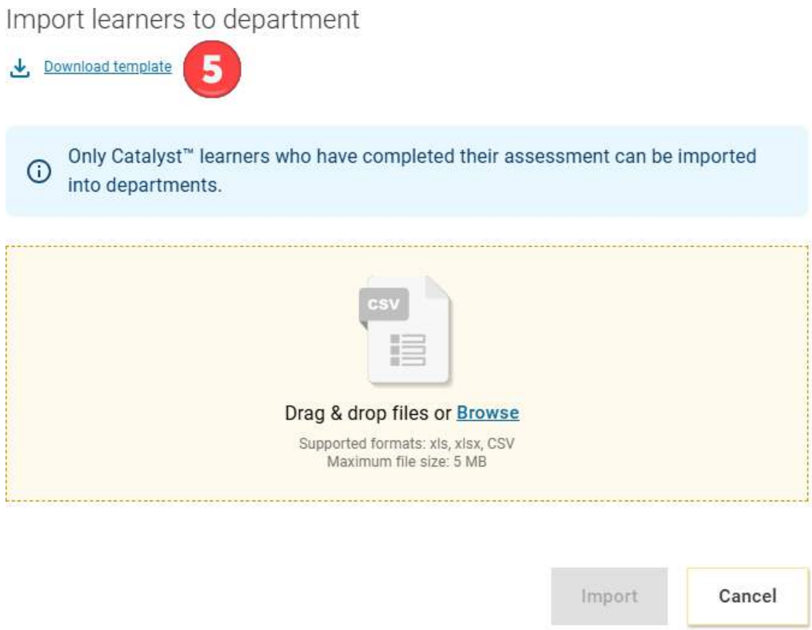
5. Click **Save**.

Bulk Import from the Department

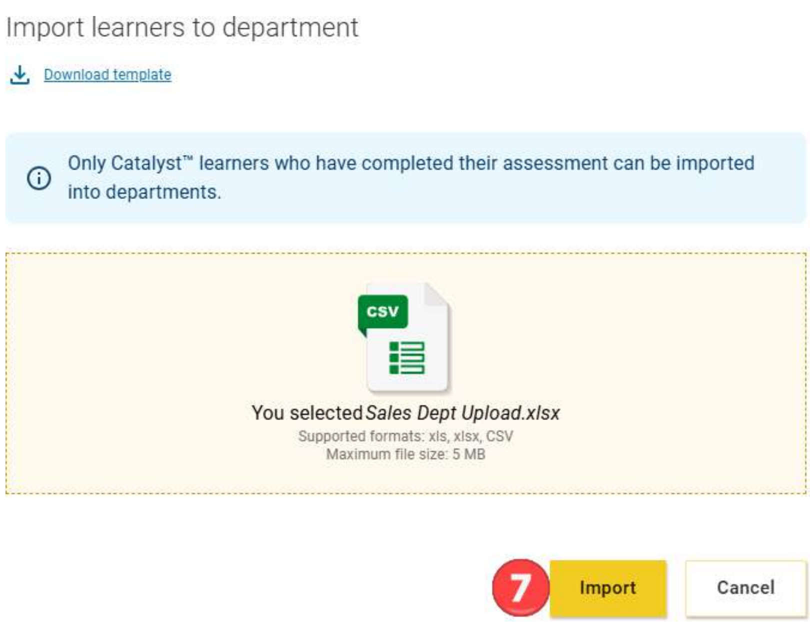
You can update the department in bulk for learners that have already registered their Catalyst users.

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**.

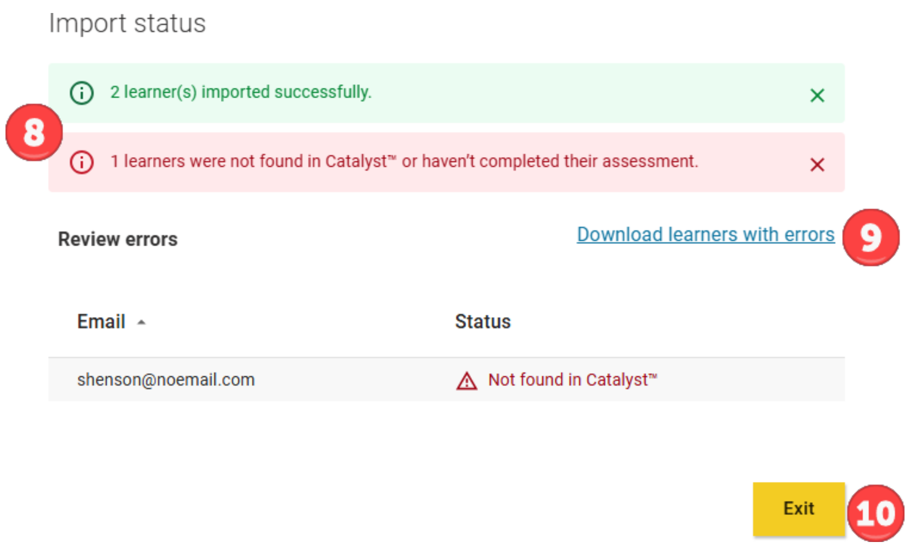
5. Click **Download template** to download an Excel template. Enter the learner information into the template and save.



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



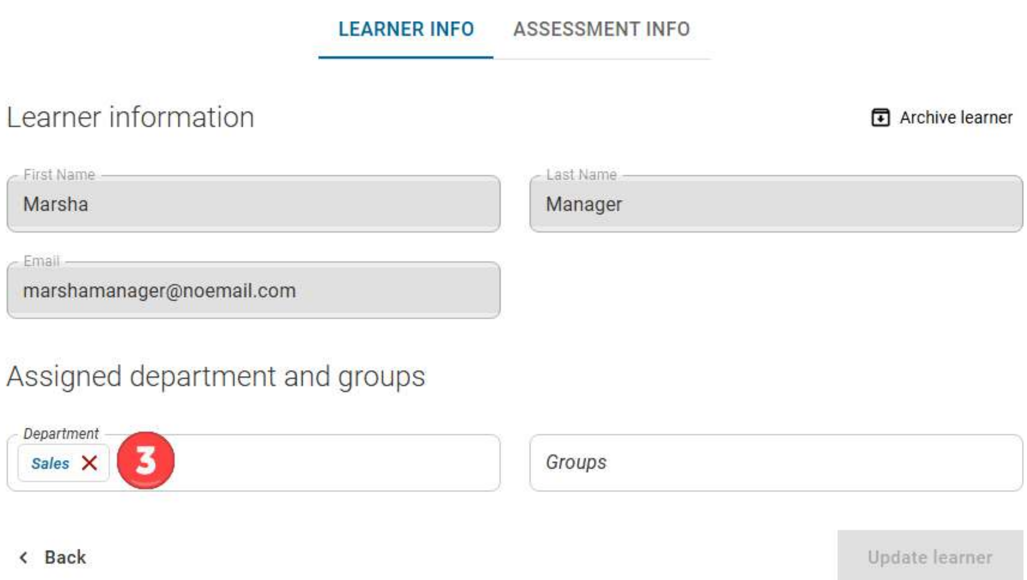
8. The import results are displayed.
9. Click the **Download learners with errors** link to download a CSV of the individuals that were not imported.
10. Click **Exit** to close the modal.



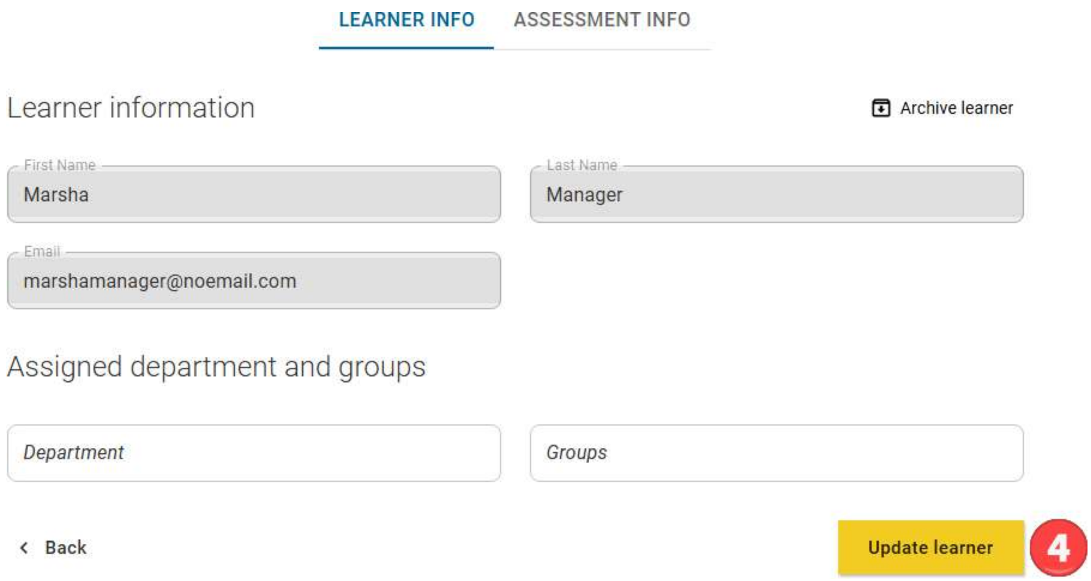
Remove Learners from a Department

From the Learner

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

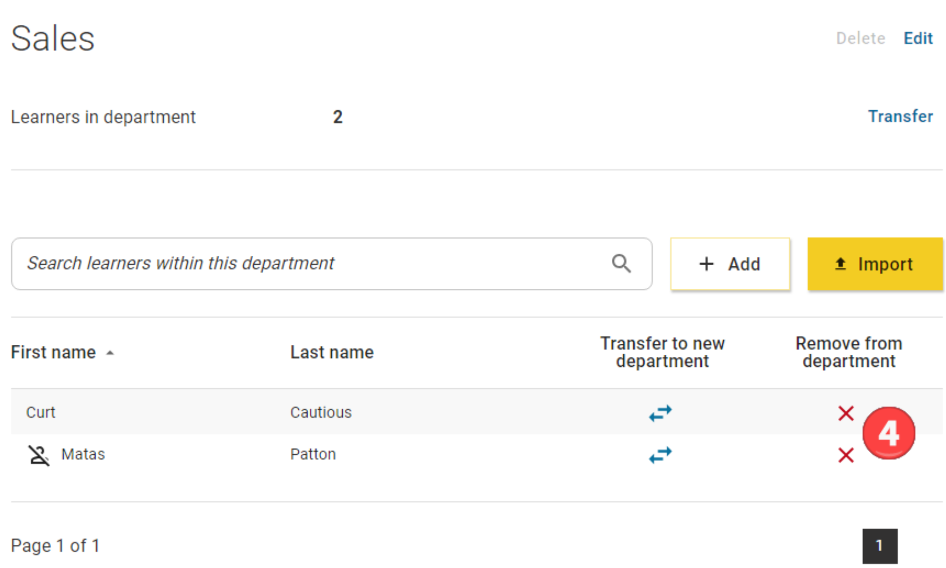


4. Click **Update learner**.



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.



5. Click **Remove** to confirm.

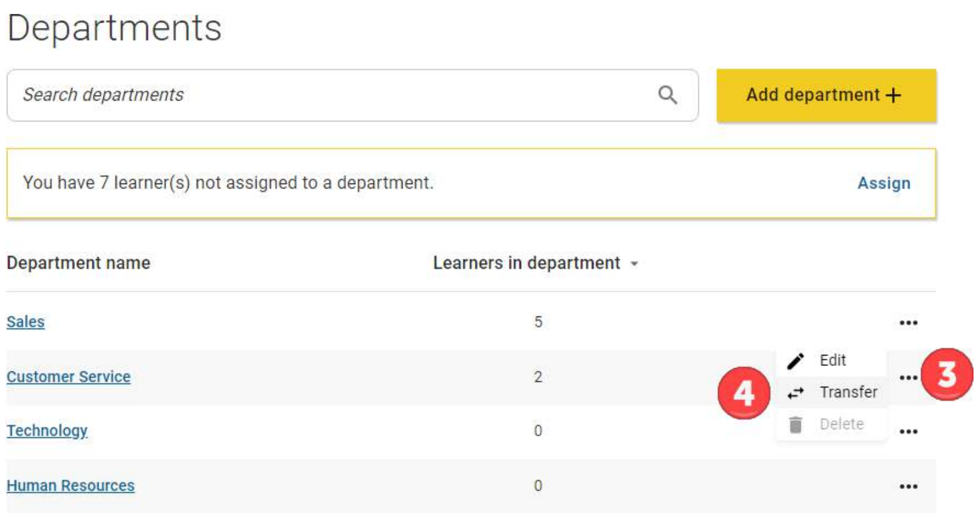
Transfer Learners Between Departments

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**.

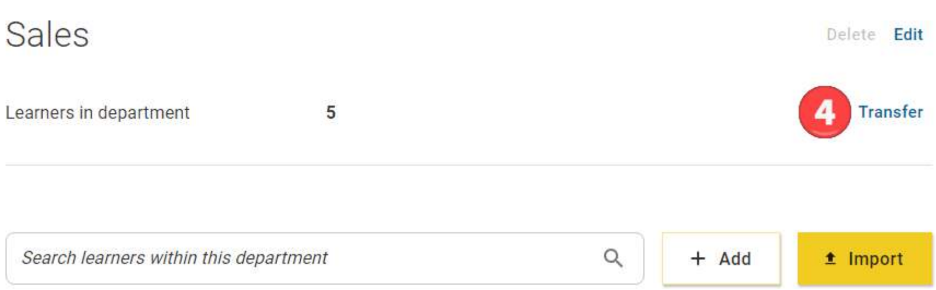


5. Select a department.
6. Click **Transfer entire department**.

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**.

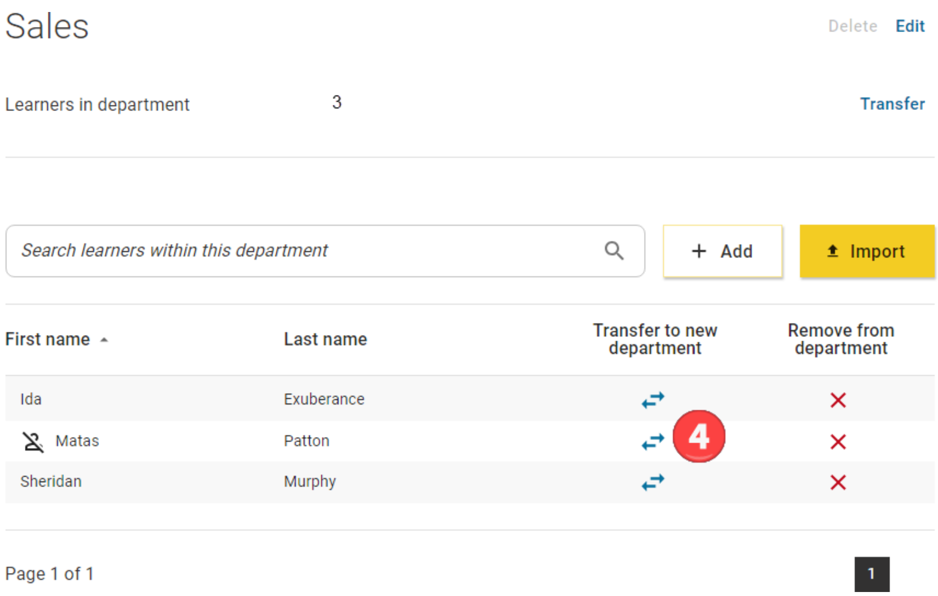


5. Select a department.
6. Click **Transfer entire department**.

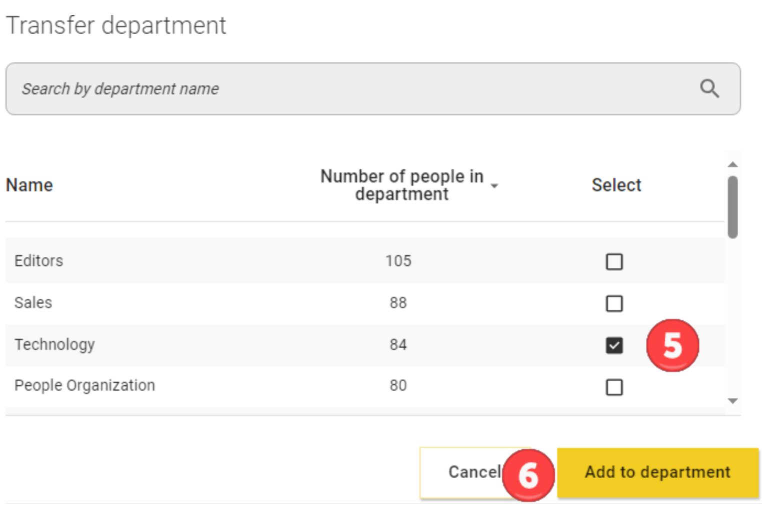
One Learner

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

4. Click ⇆ to the right of the learner.



5. Select the new department.
6. Click **Add to department**.



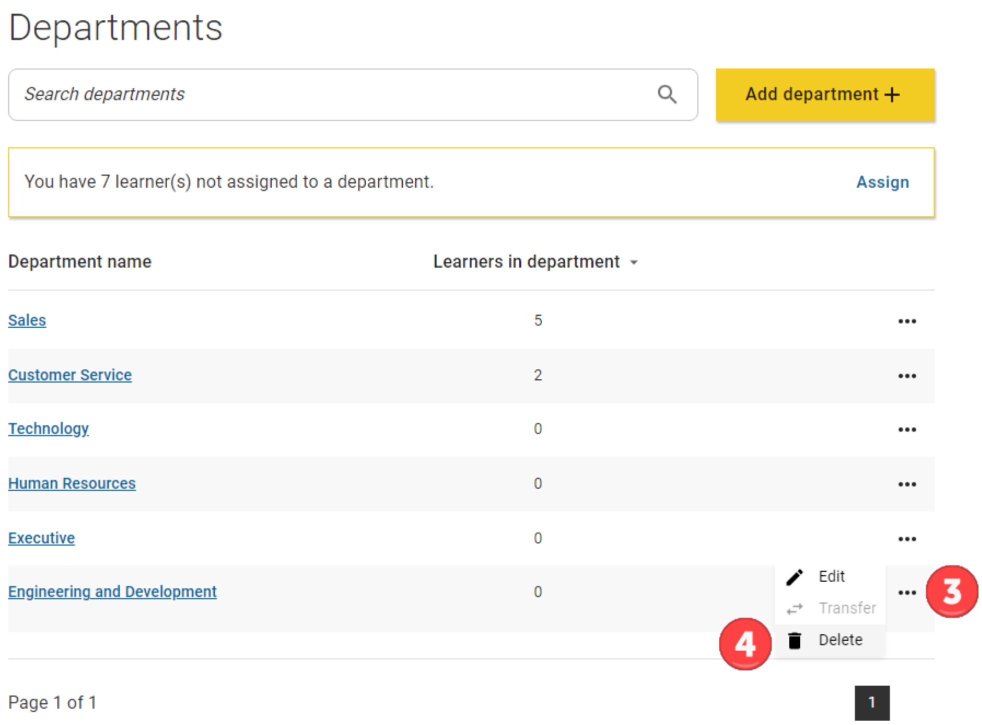
7. Click **Transfer** to confirm.

Delete Departments

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

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 **Delete**.



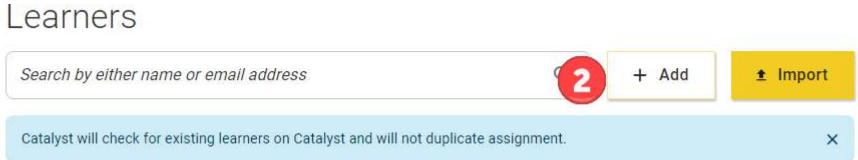
Learners

Assign Catalyst to New Learners

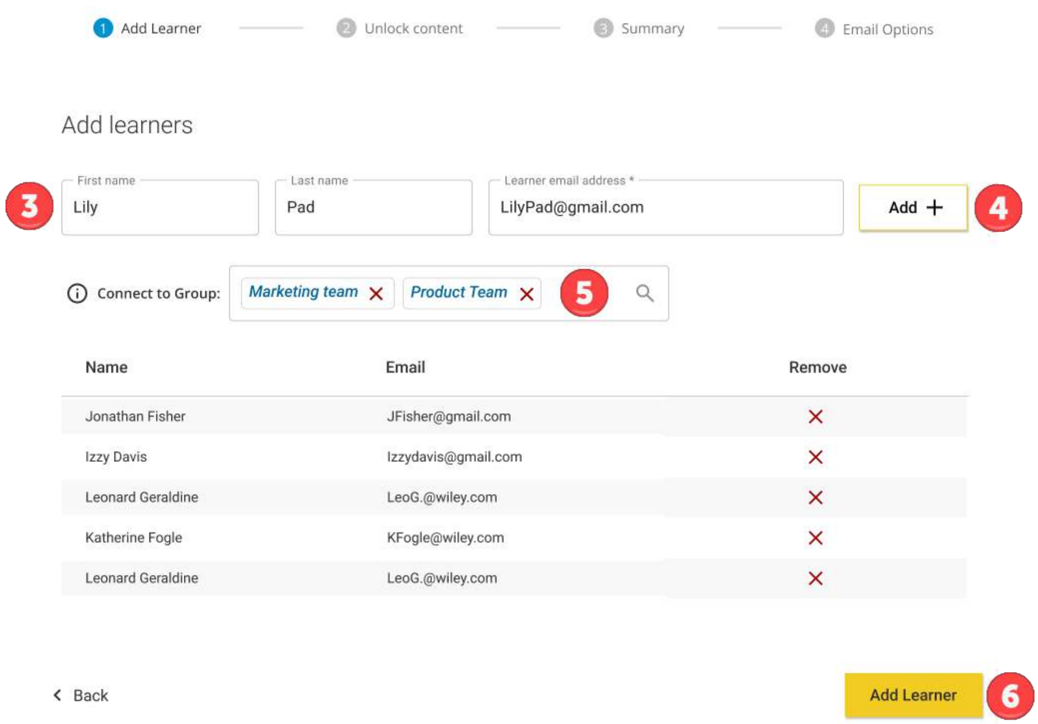
Administrators can create Catalyst learners by entering their information one learner at a time or in bulk by uploading a comma-delimited file. All you need is each learner’s name and email address. Assign all available content when creating the learner or only assign Workplace and unlock Worksmart,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

One-by-One

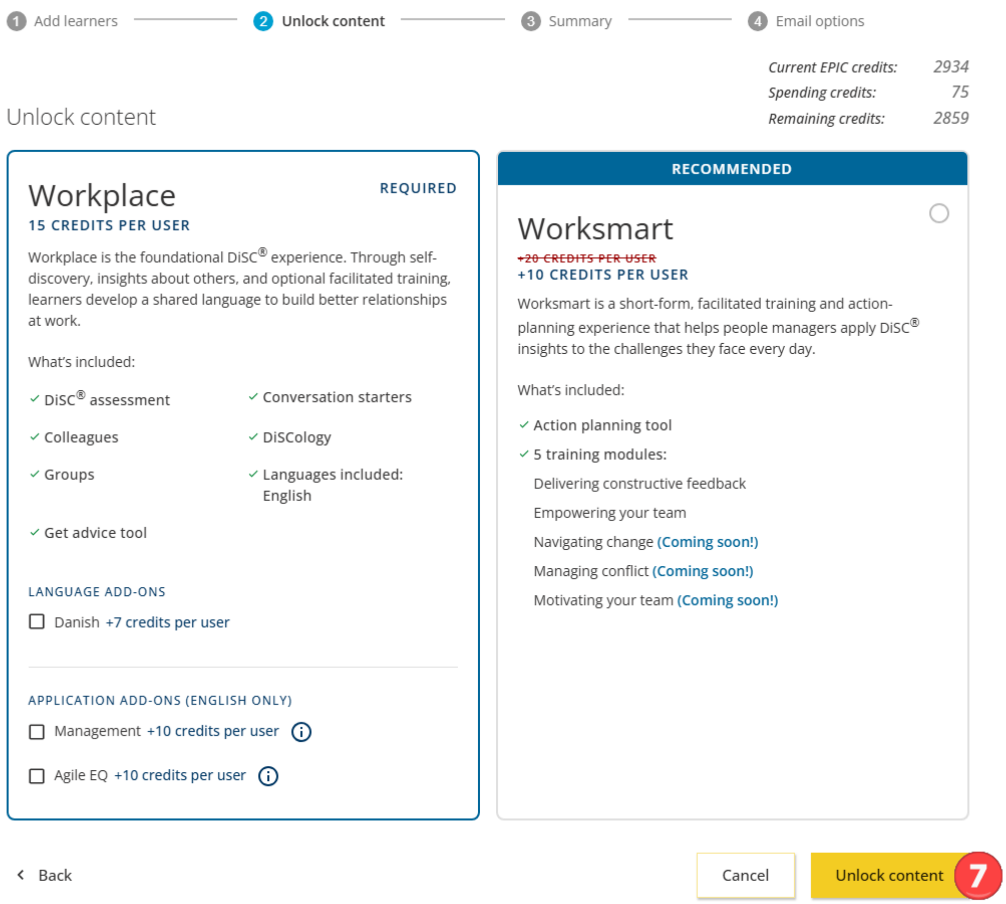
1. From the *Organizations* page, click the organization name.
2. Click **+ Add** from the *Learners* page.



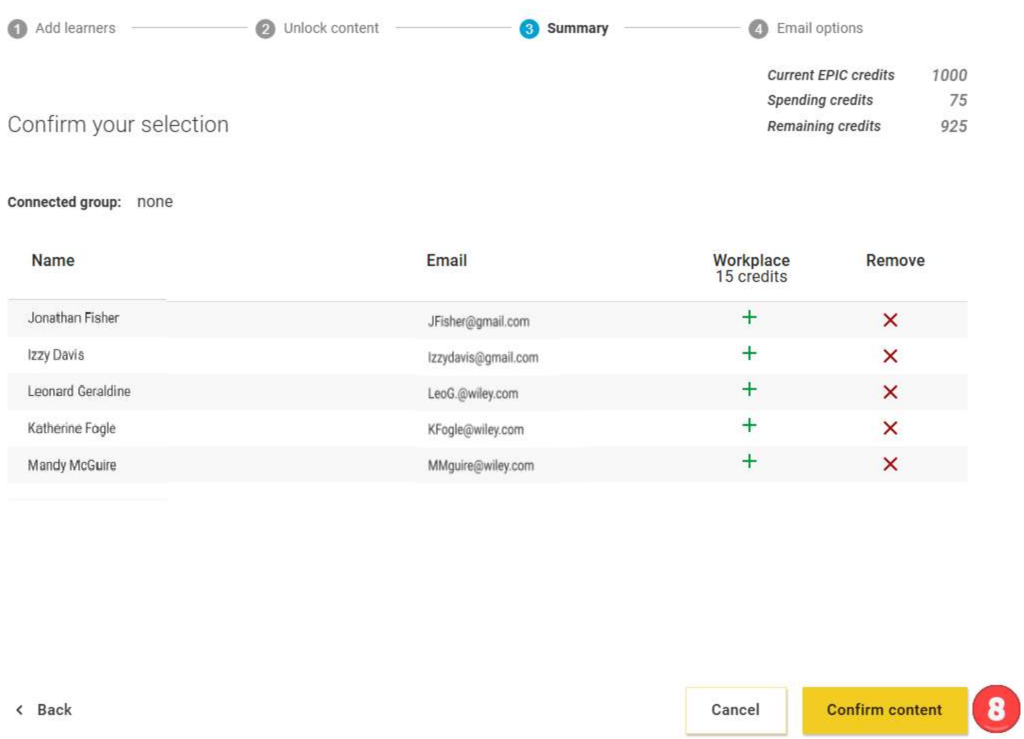
3. Enter the learner’s name and email address.
4. Click **Add+**. Repeat steps 3 and 4 until all the Learners you want to create appear.
5. Click in the **Connect to Group** field to select one or more existing groups or create a new group to which you want to add the learner(s). This field is optional.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



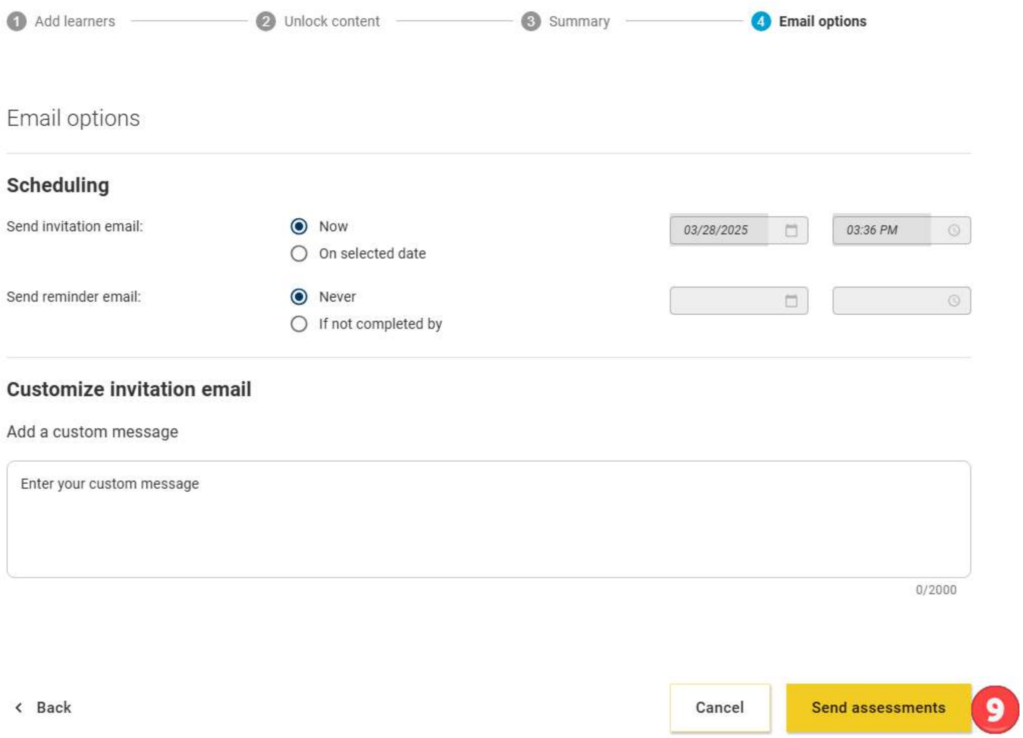
7. Select the content to unlock and click **Unlock Content**.



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



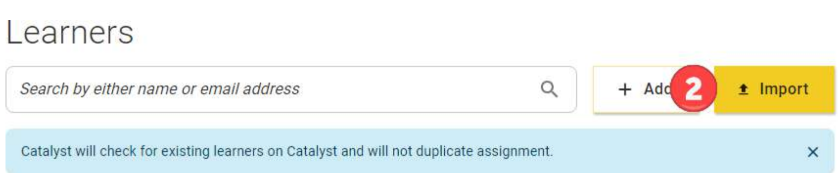
9. Edit email settings and click **Send assessments**.



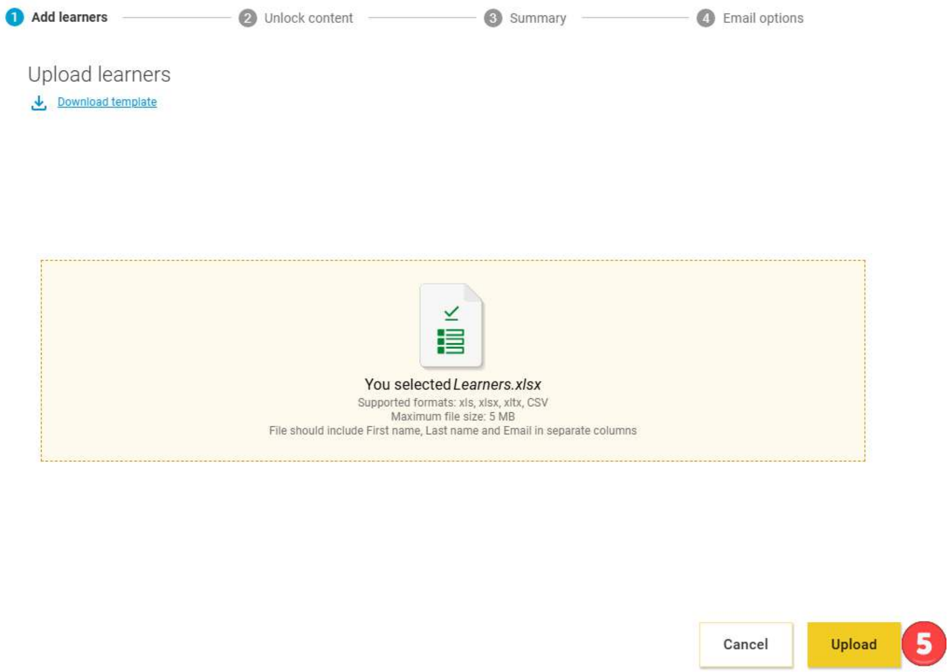
Bulk Import

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.

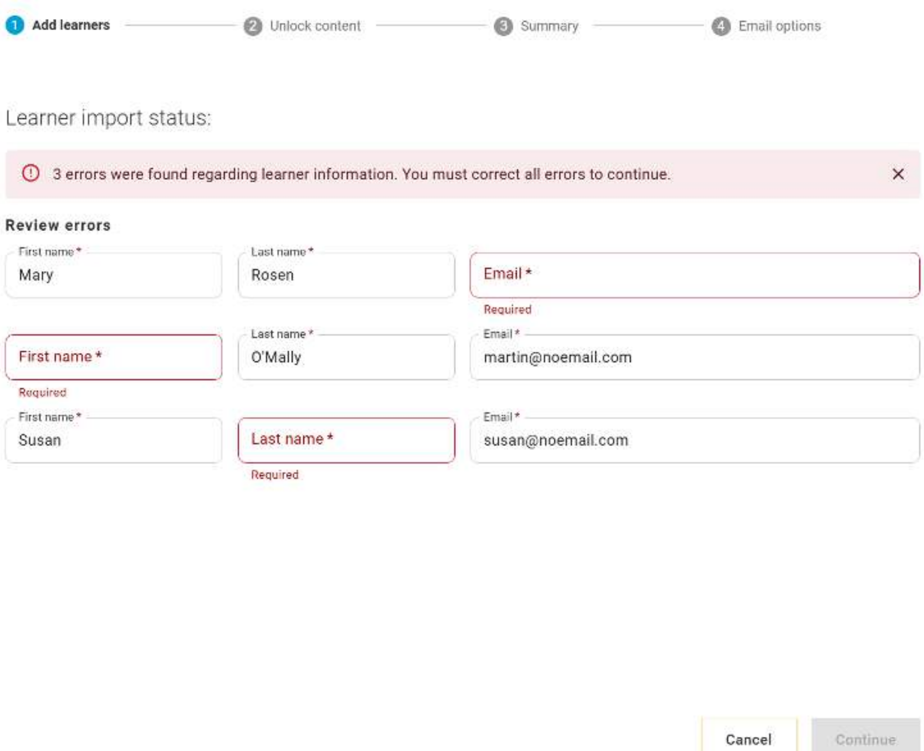
1. From the *Organizations* page, click the organization name.
2. Click **Import**.



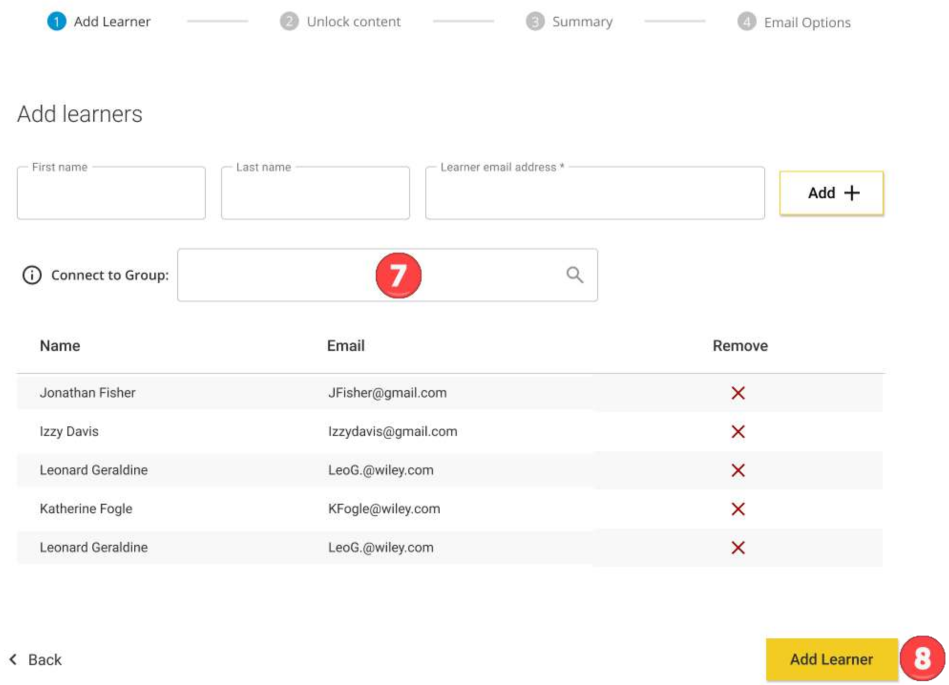
3. Click **Download template** to enter the learners’ names and email addresses.
4. Drag and drop the file you created or click **Browse** to find the file.
5. Click **Upload file**.



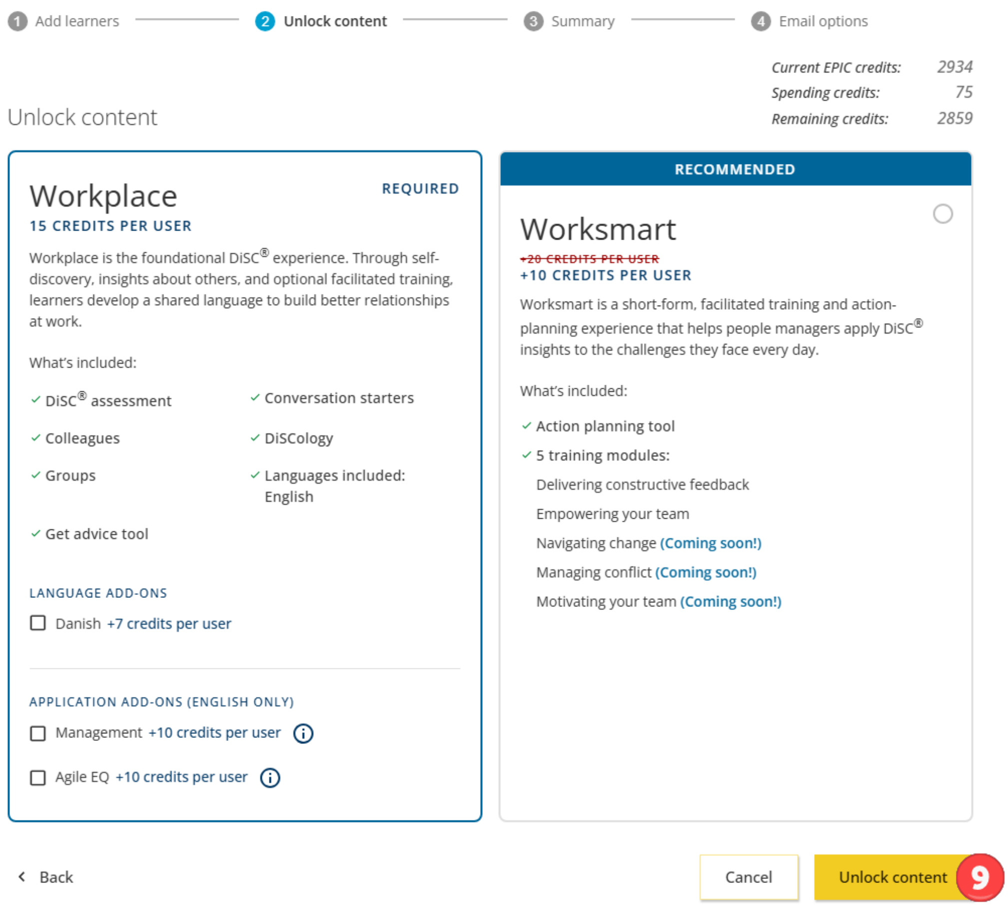
If any required information missing from the import file is displayed. Correct the errors directly on the import screen before clicking **Continue**.



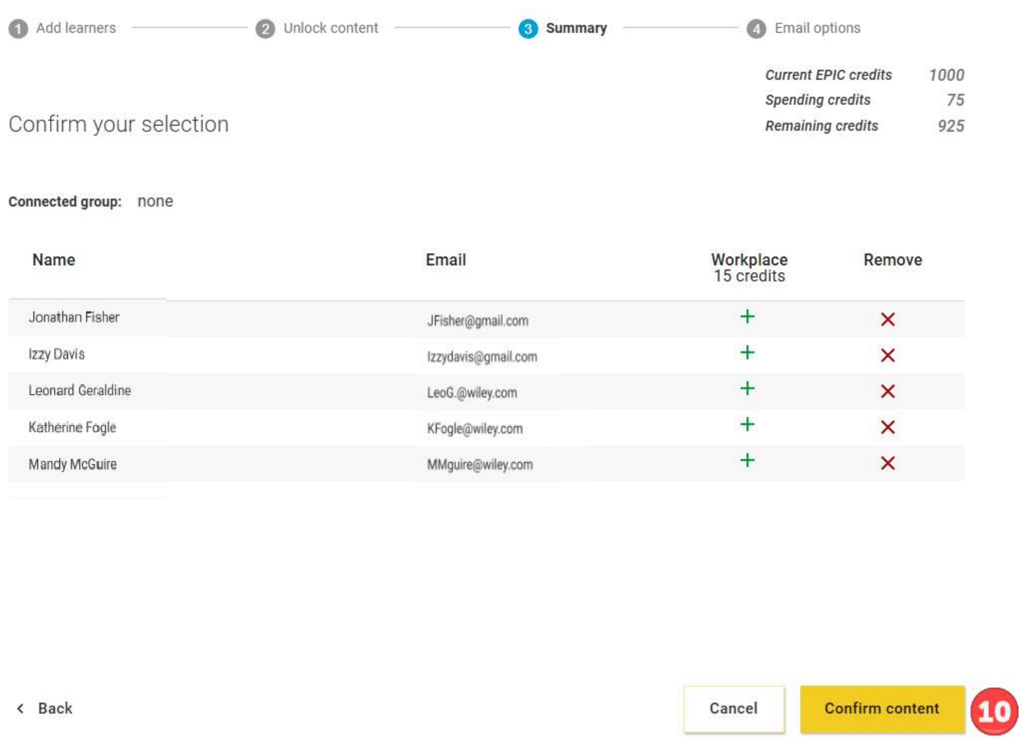
7. Optionally, add the learners to a group. Begin entering a group name in the Connect to Group field to see the options to select an existing group or add a new group. See the Groups section of this user guide for more information on creating and using this feature.
8. Click **Add Learner**.



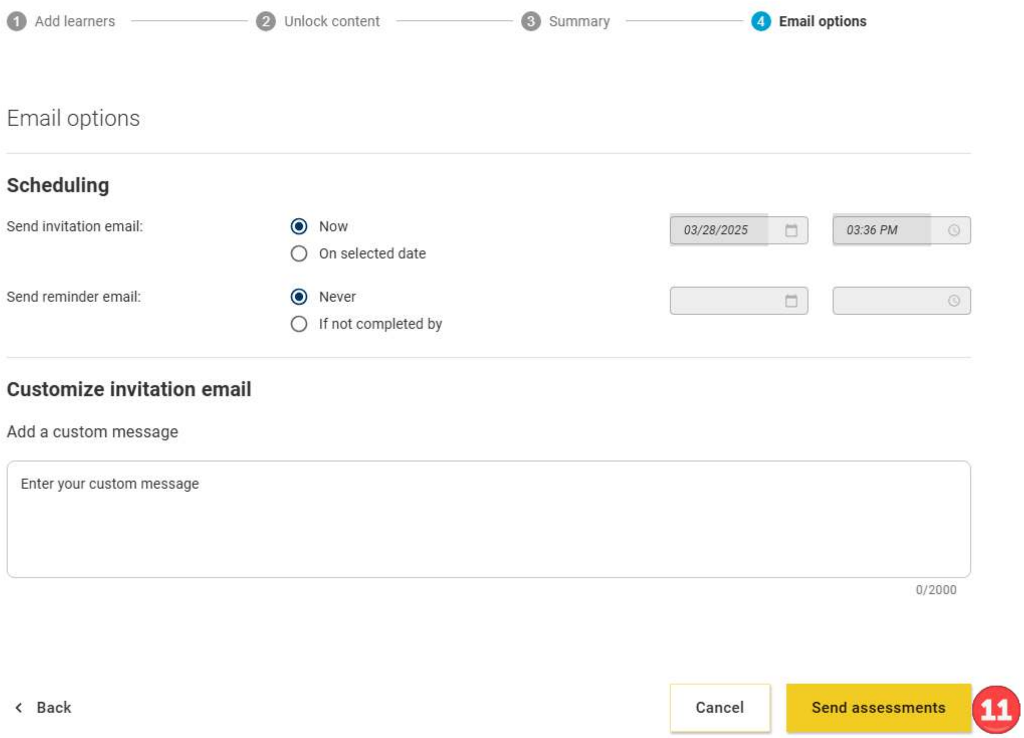
9. Select the content to unlock and click **Unlock Content**



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



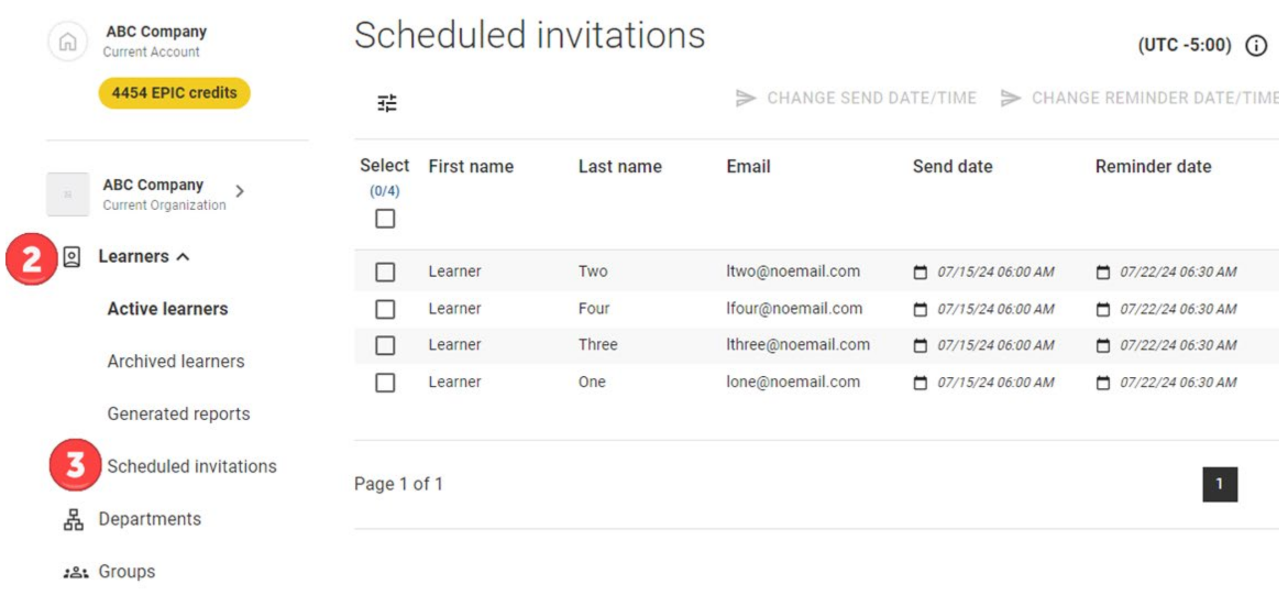
11. Edit email settings and click **Send assessments**.



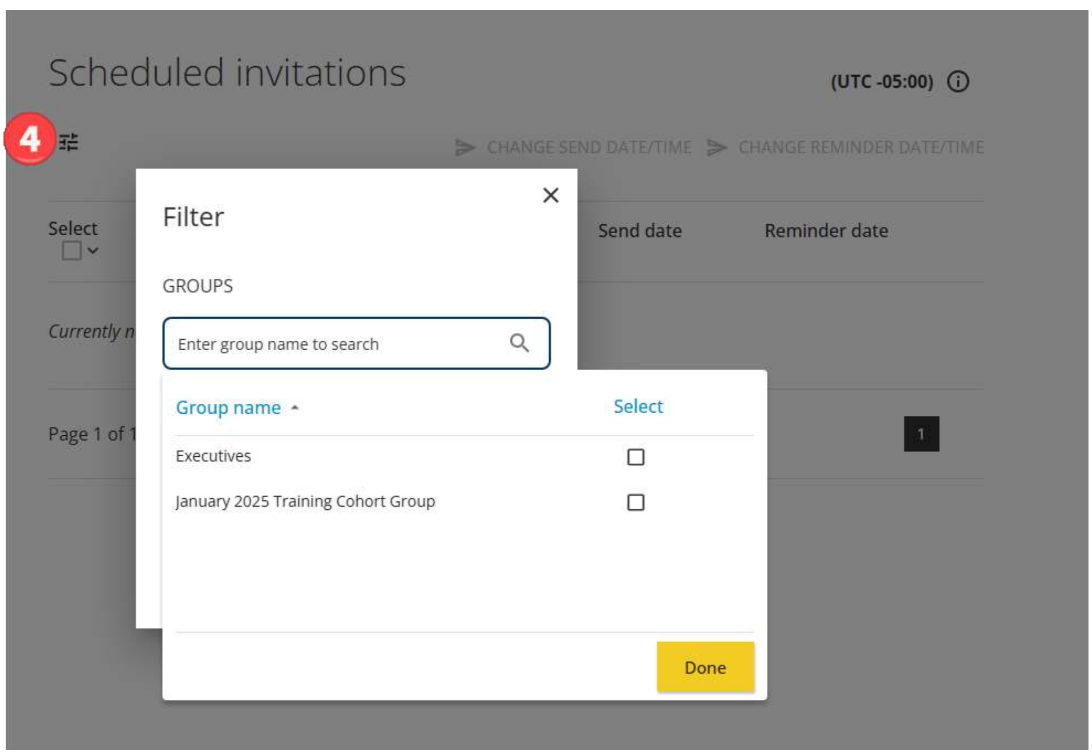
Scheduled Invitations & Reminders

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**.

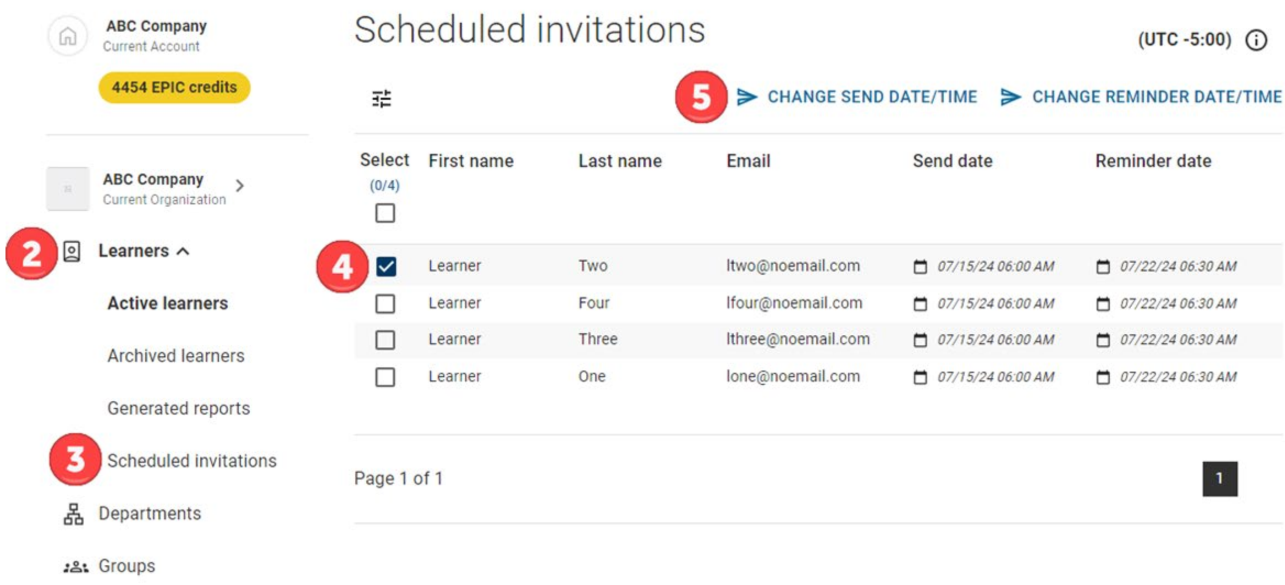


4. Click the filter icon to filter by Groups.

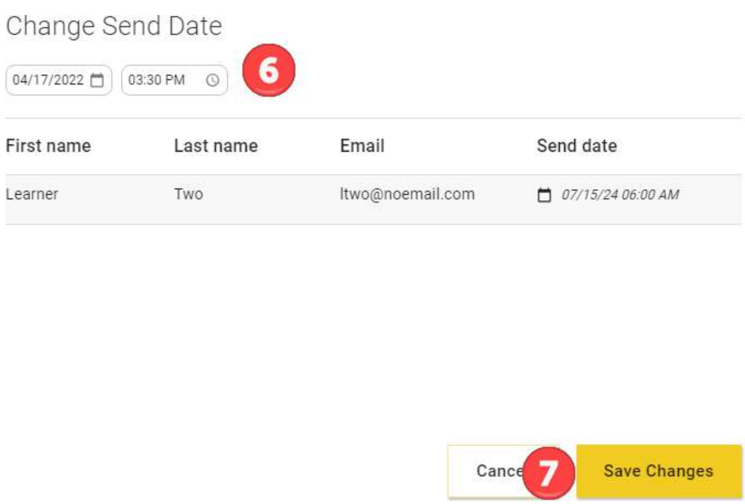


Change Invitation Send Date/Time

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**.

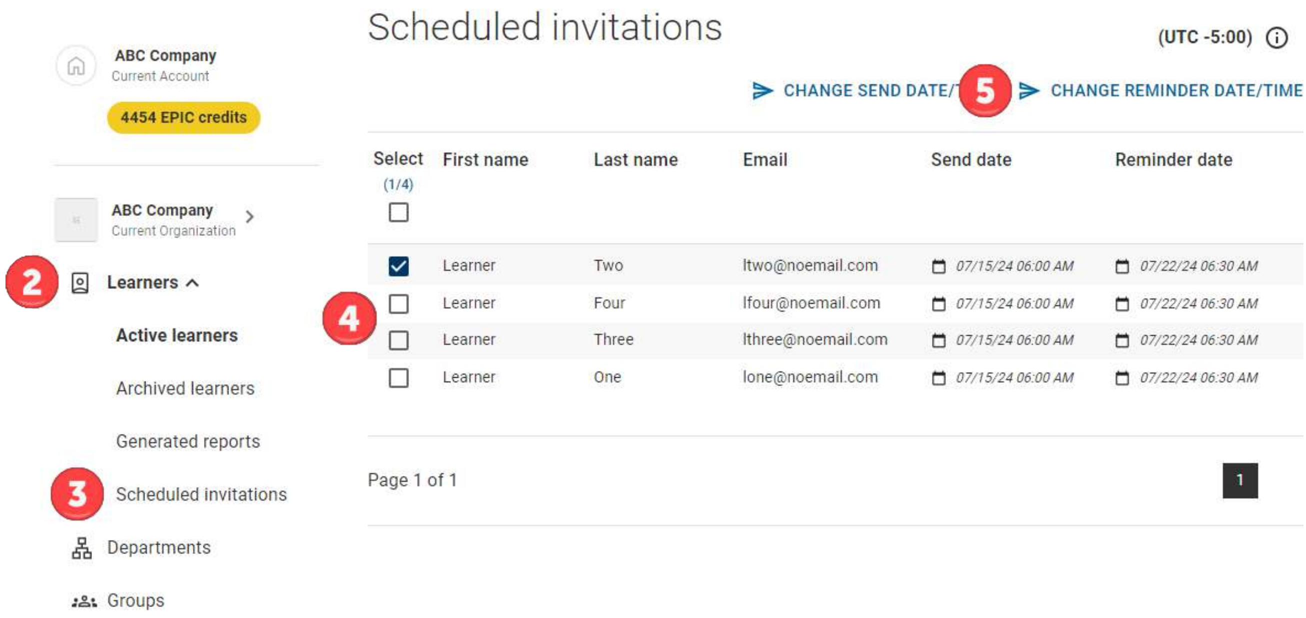


6. Edit the date and/or time.
7. Click **Save Changes**.

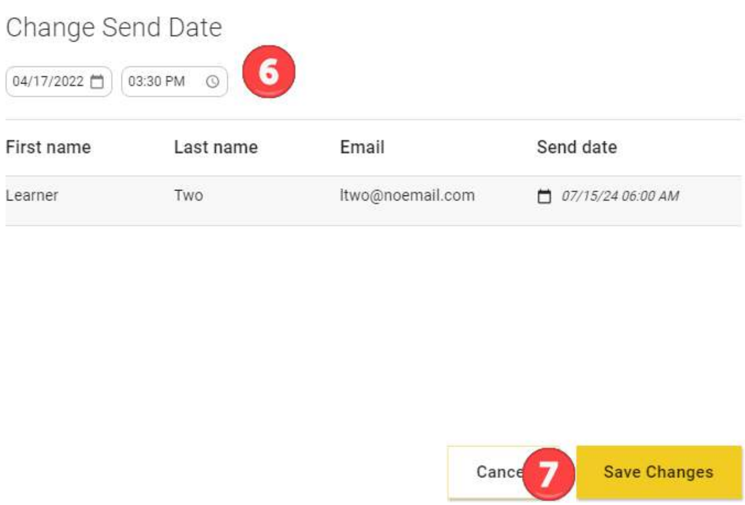


Change Reminder Send Date/Time

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**.



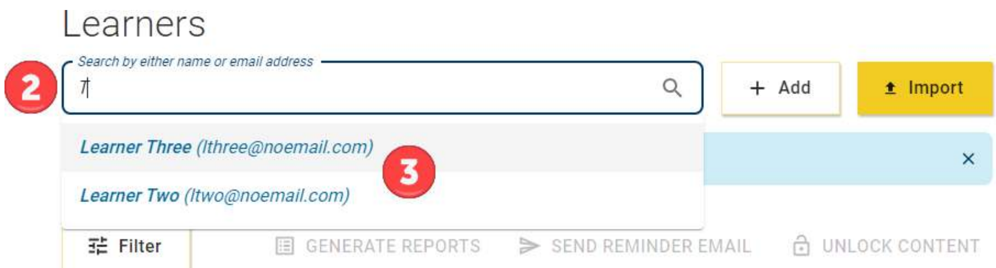
6. Edit the date and/or time.
7. Click **Save Changes**.



Search for Learners & Filter Search Results

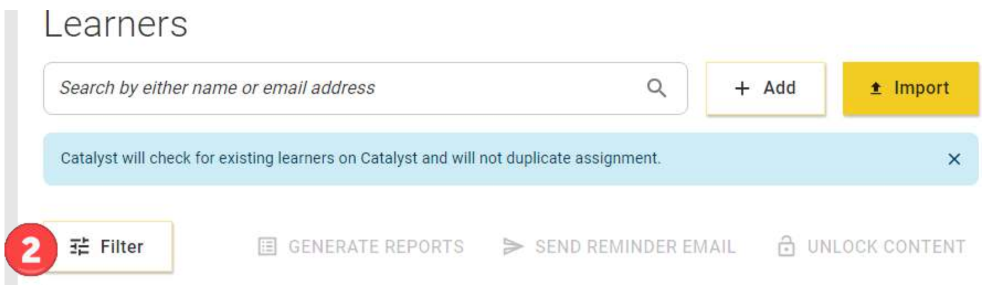
Administrators can search for learners by name or email address.

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.

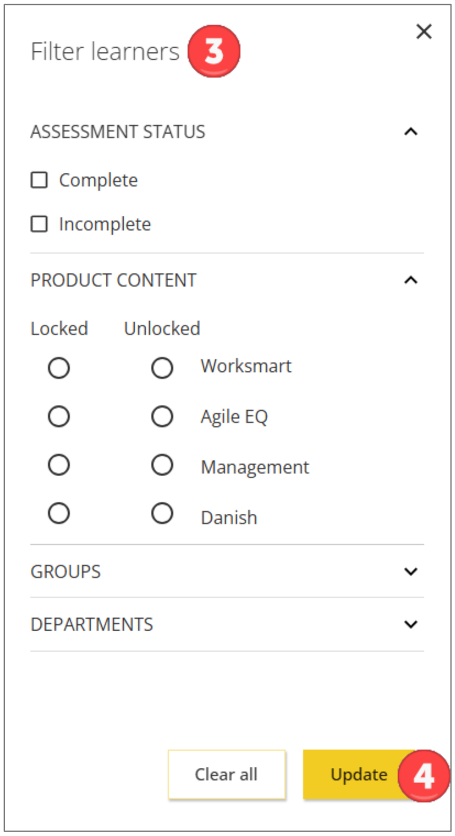


But you can also filter your learners by assessment status, product content, groups, and departments.

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



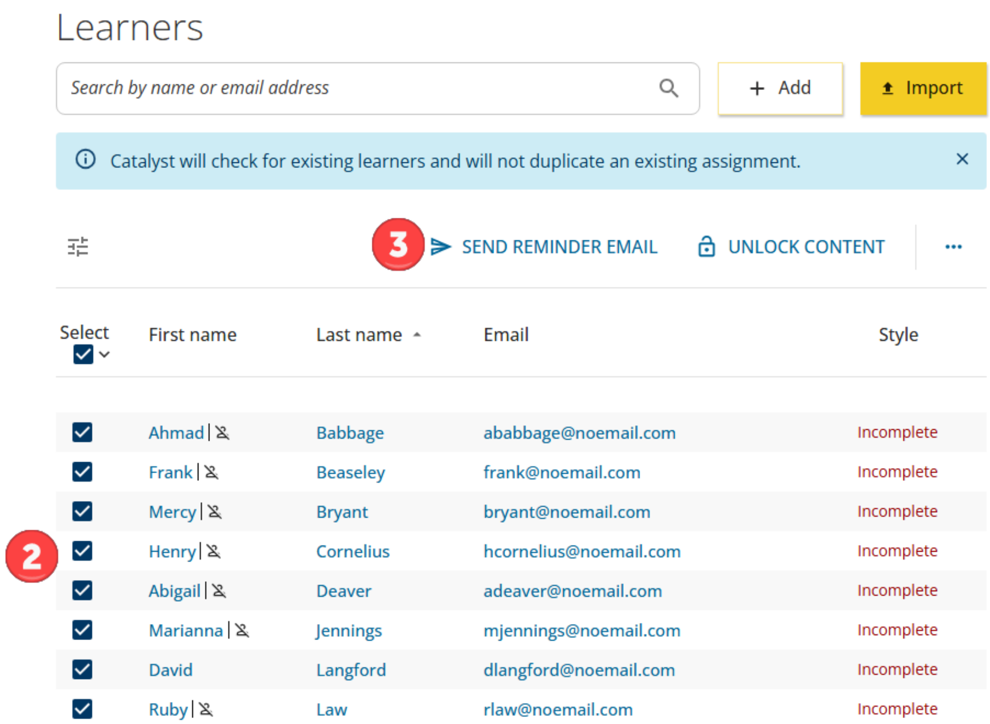
3. Select filters:
    a. Assessment Status – Complete or incomplete
    b. Product Content (Locked or Unlocked) – Worksmart, Agile EQ, Management, and Danish
    c. Groups – Search by group name
    d. Departments – Search by department name
4. Click **Update**.



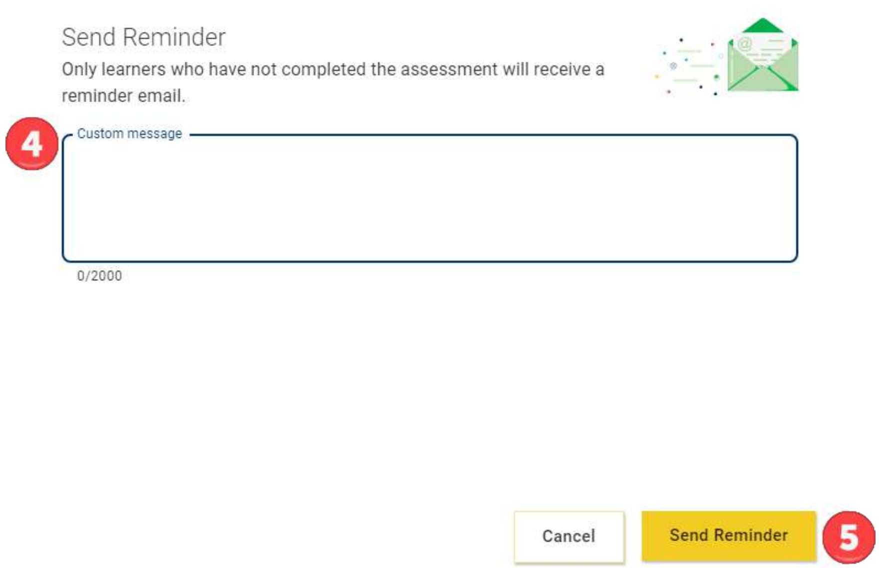
Send Ad Hoc Reminders to Learners

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**.



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

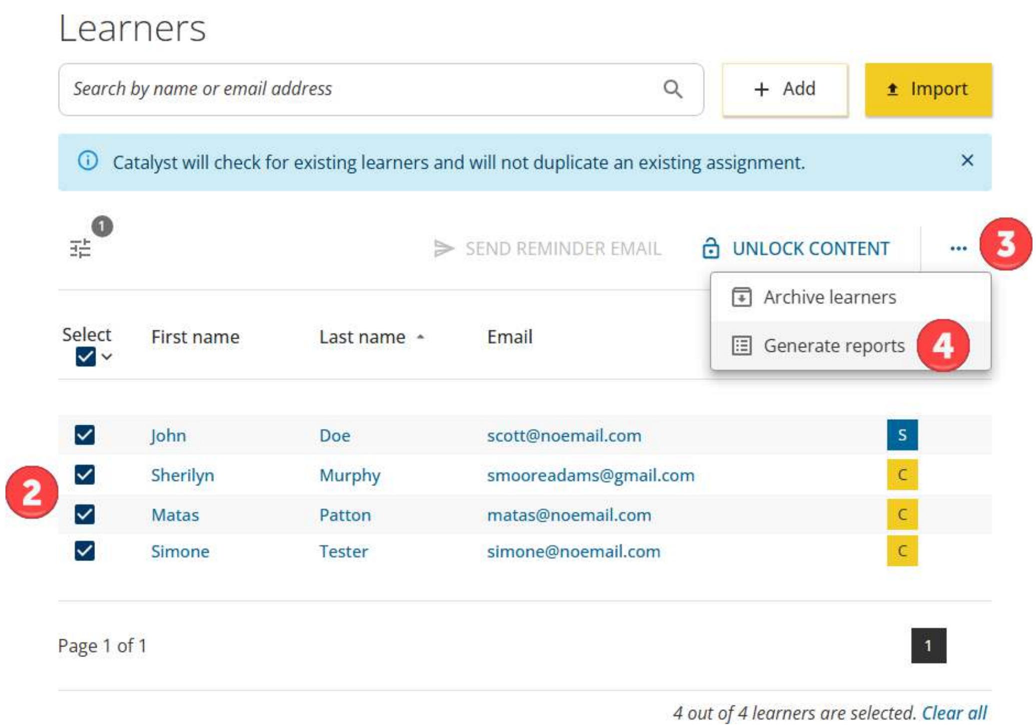


Generate Reports

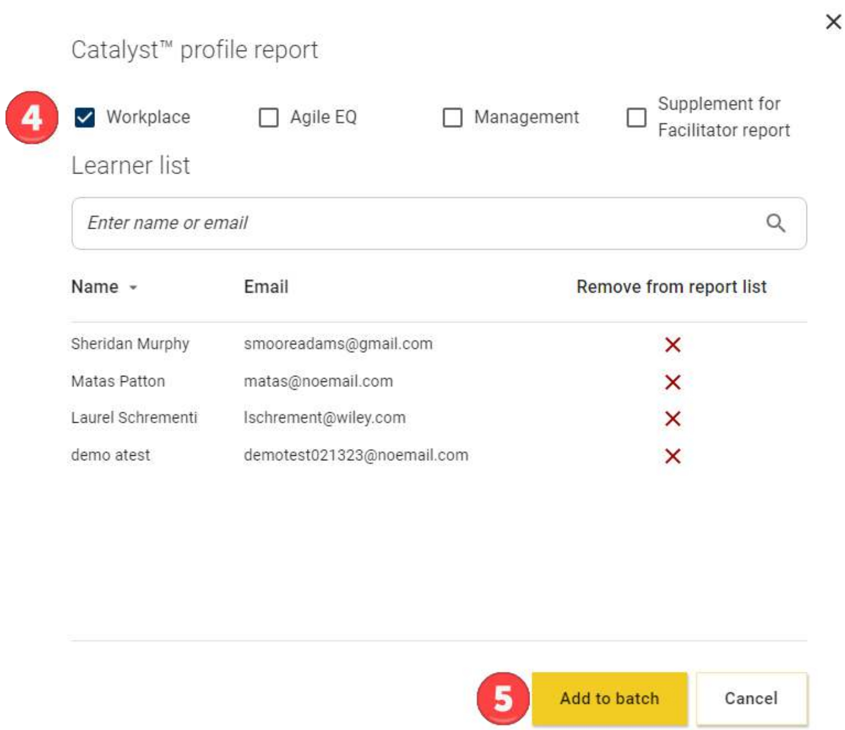
Administrators can generate reports for any learner with a completed assessment. Reports can be generated from the main Learners page or from individual Learner records. Note, the Supplement for Facilitator Report can only be generated in batch for multiple learners.

Multiple Learners

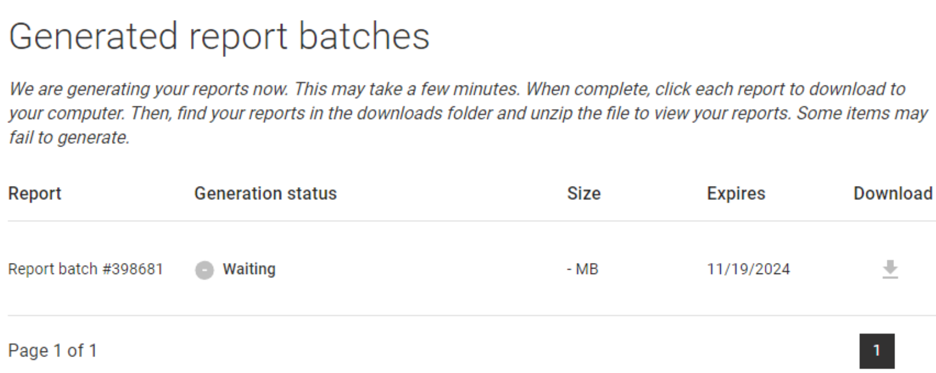
1. From the *Organizations* page, click the organization name.
2. Search and select learners with completed assessments.
3. Click the meatball ··· menu above the list of learners.
4. Click **Generate reports**.



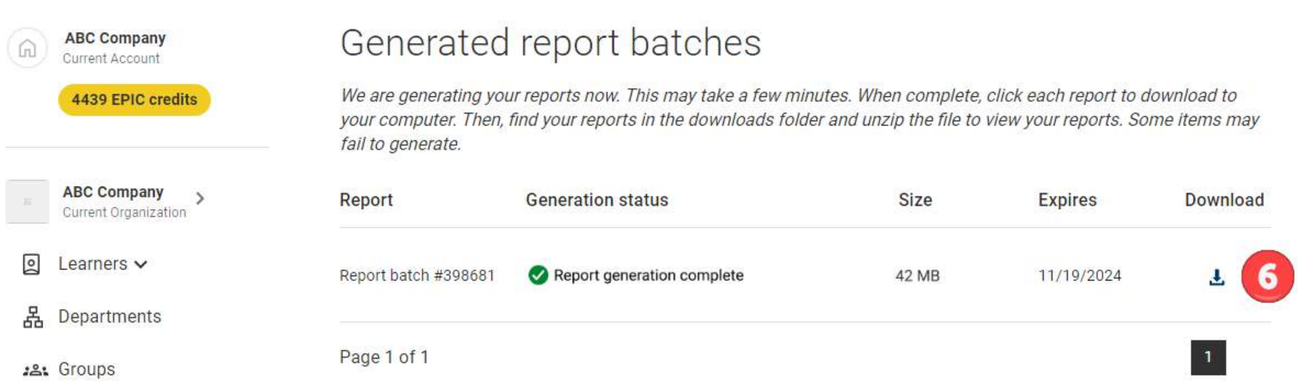
5. Select the content. Note, the Supplement for Facilitator Report can only be generated through this batch method.
6. Click **Add to batch**.



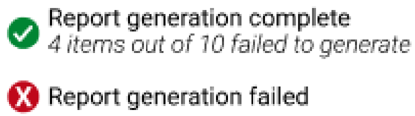
The Generated Reports page opens. It may take a few minutes to generate multiple reports.



7. 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.

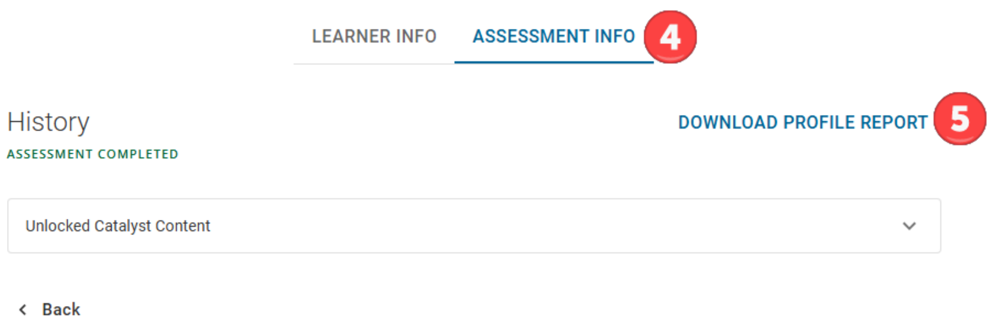


Note, the *Generation status* column will also show if there were issues generating any reports.



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.



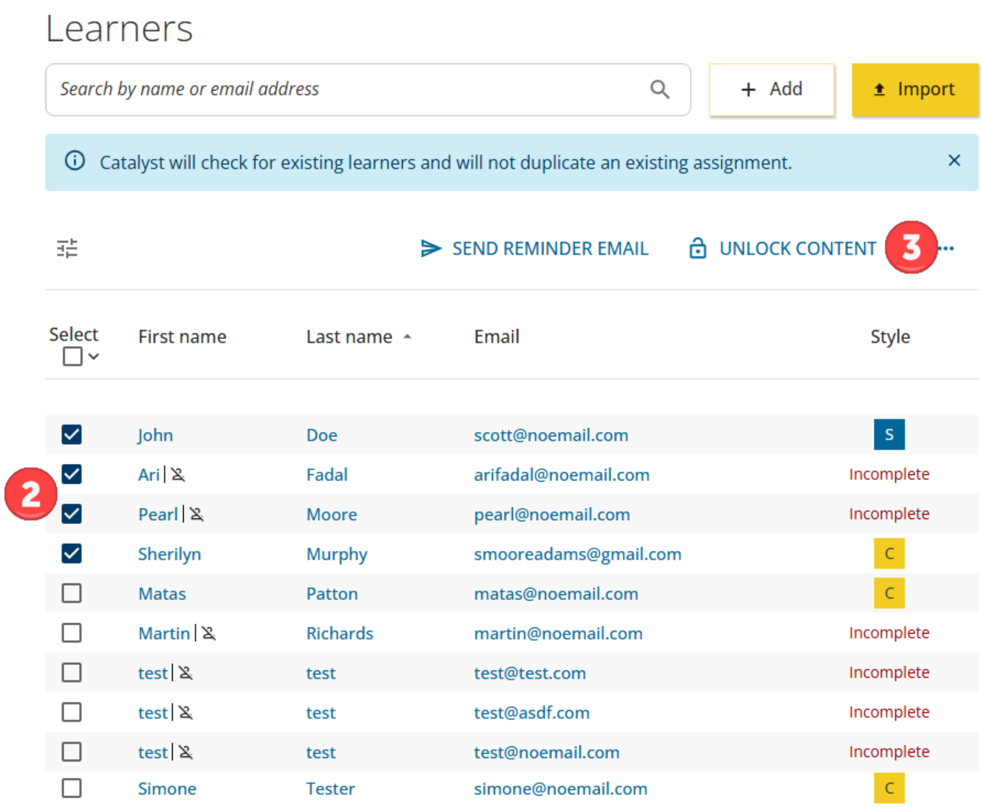
Unlock Additional Content for Existing Learners

Multiple Learners

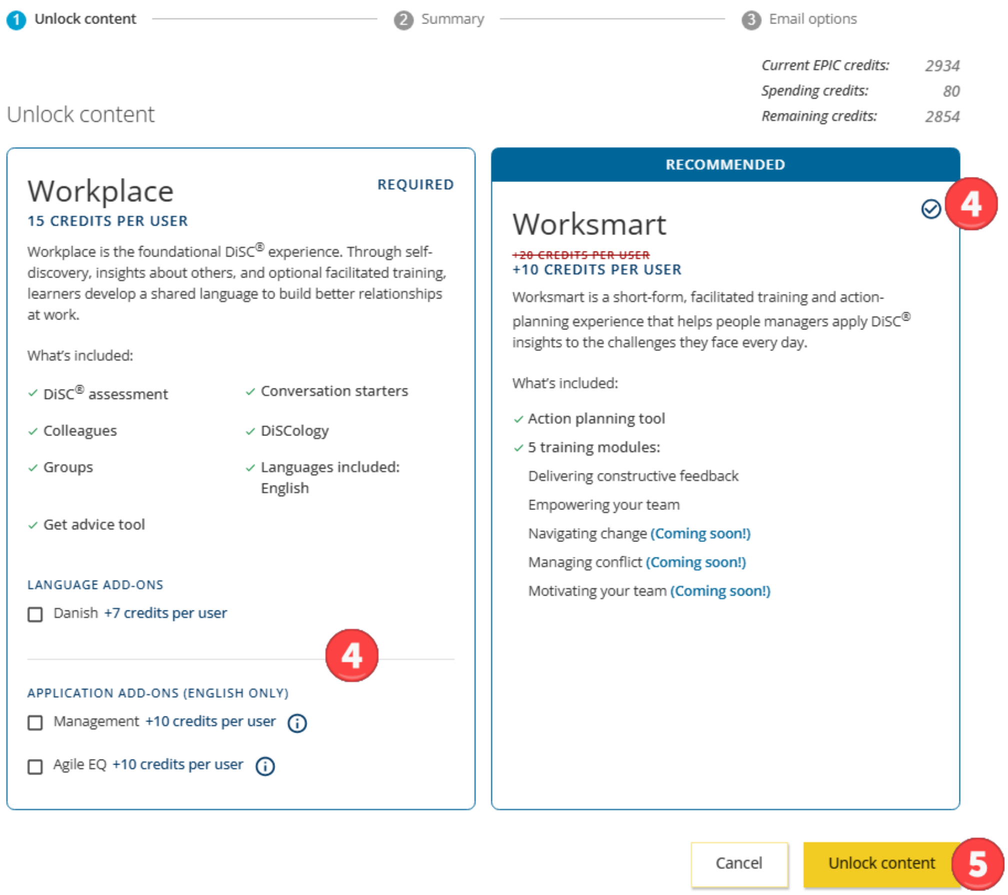
Manual Method

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

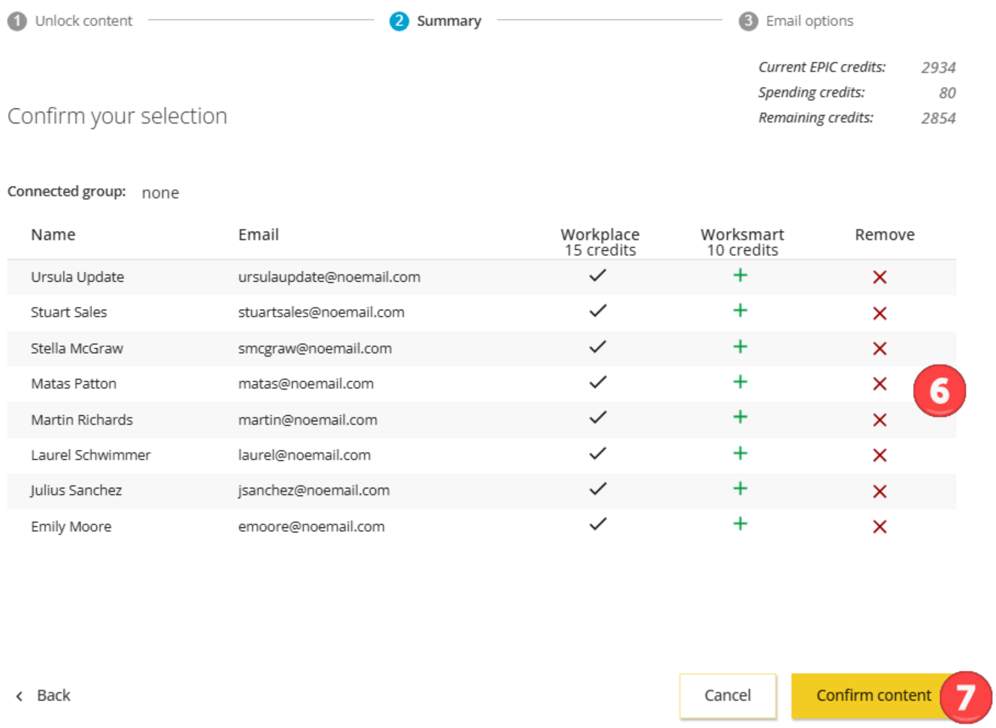
1. From the *Organizations* page, click the organization name.
2. Search for and select the learners.
3. Click **UNLOCK CONTENT**.



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



6. 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.
7. Click **Confirm content**.



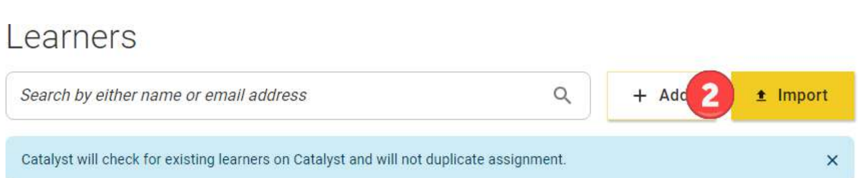
8. Enter a customer message, if desired, and click **Send**.
9. Click **Done**. Emails are sent at once. Existing learners with a pending assessment get a reminder. Learners with a completed assessment receive the “add-on content” email notification.

Import Method

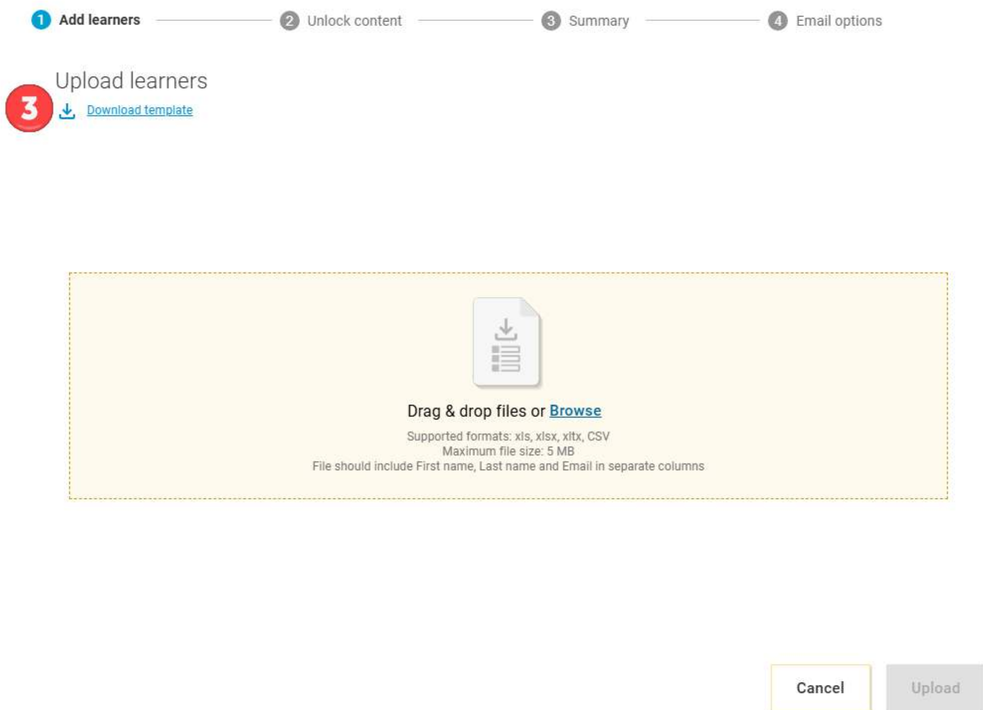
You can also import a list of existing learners and then request to unlock additional content. This method allows you to add a custom message to the invitation in addition to scheduling a future delivery of the invitation and reminder emails.

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.

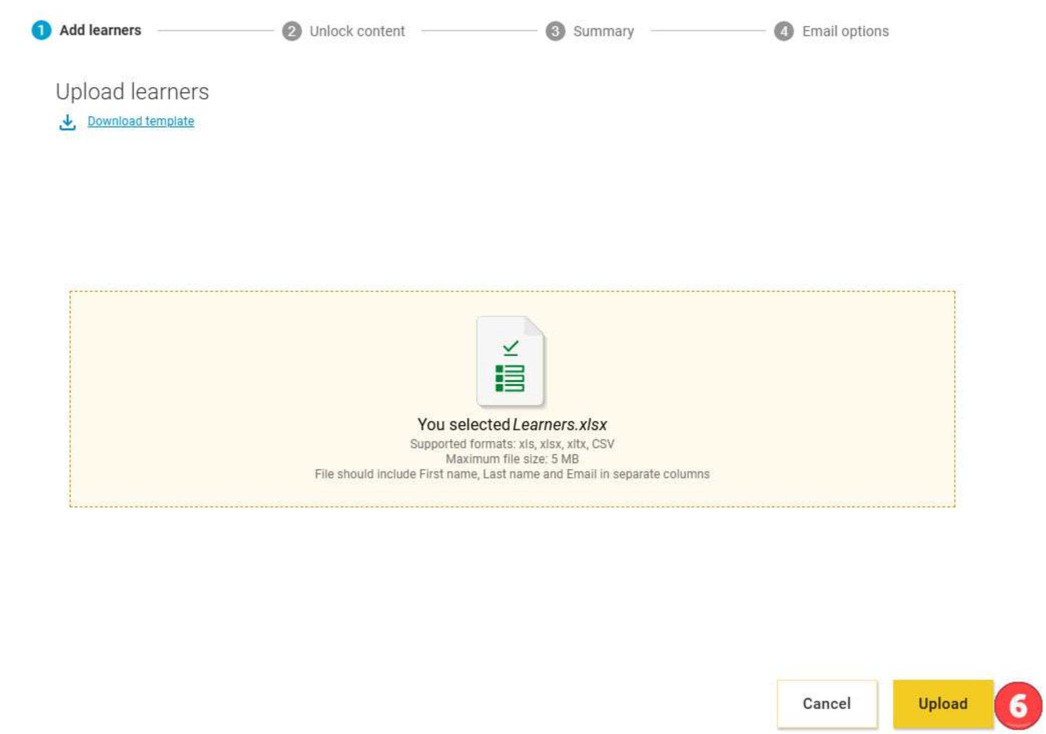
1. From the *Organizations* page, click the organization name.
2. Click **Import** as if you are importing a file of new learners.



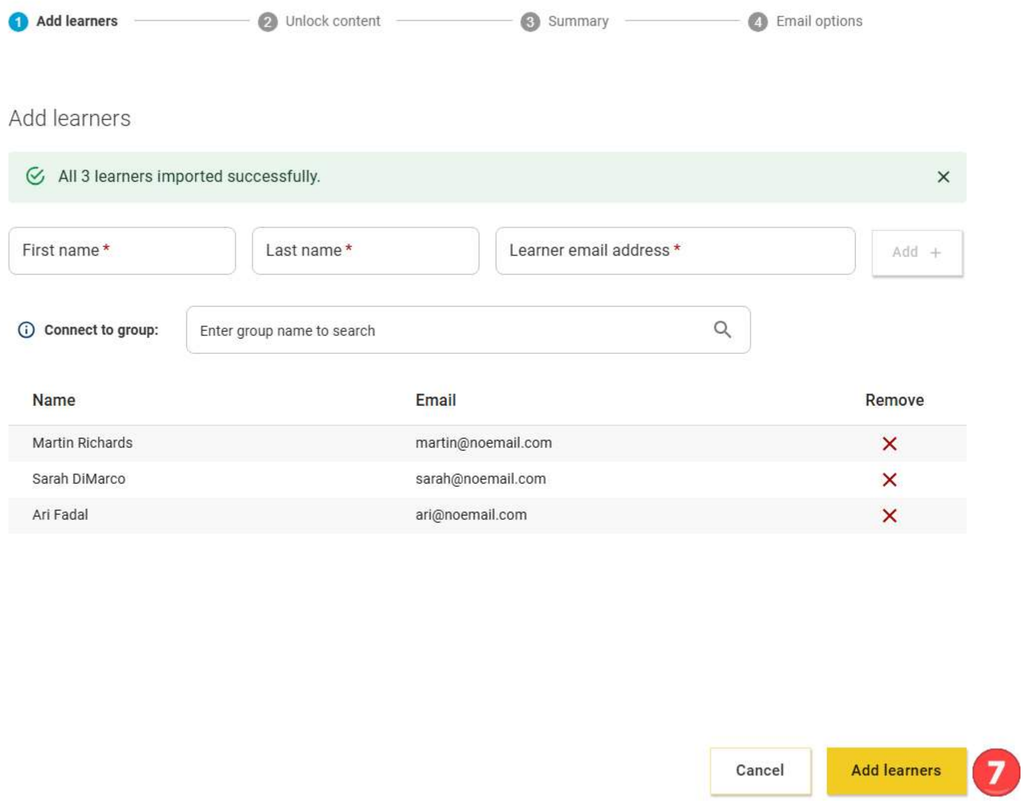
3. Click **Download template**.



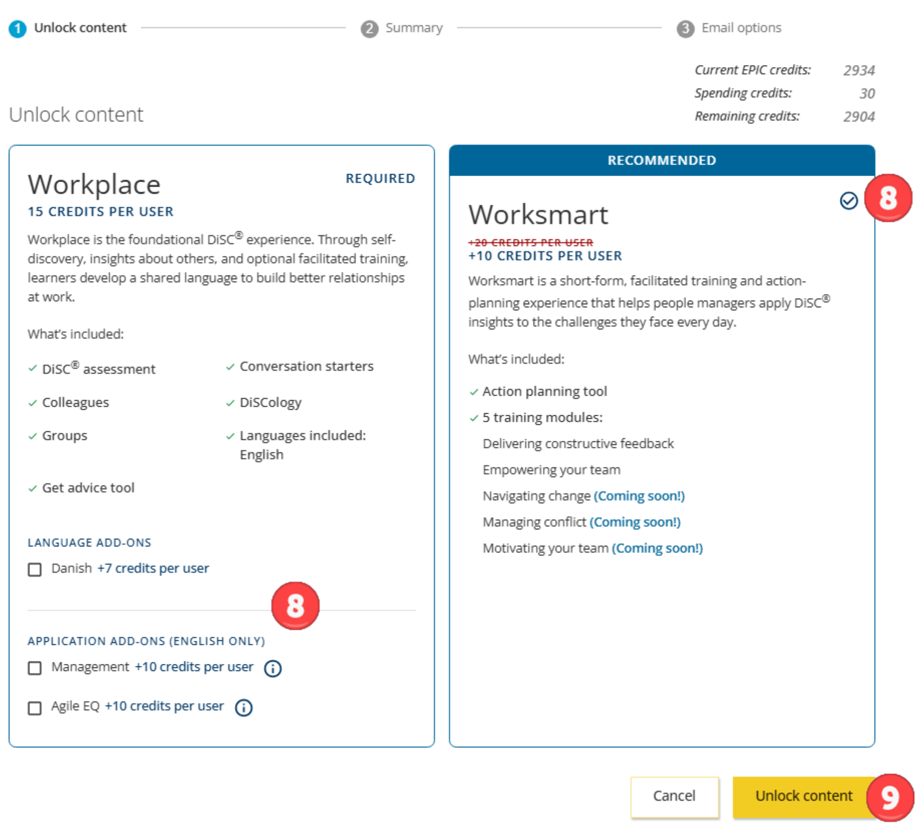
4. Enter the names and email addresses of the **existing** learners and save.
5. Drag and drop the file you created or click **Browse** to find the file.
6. Click **Upload**.



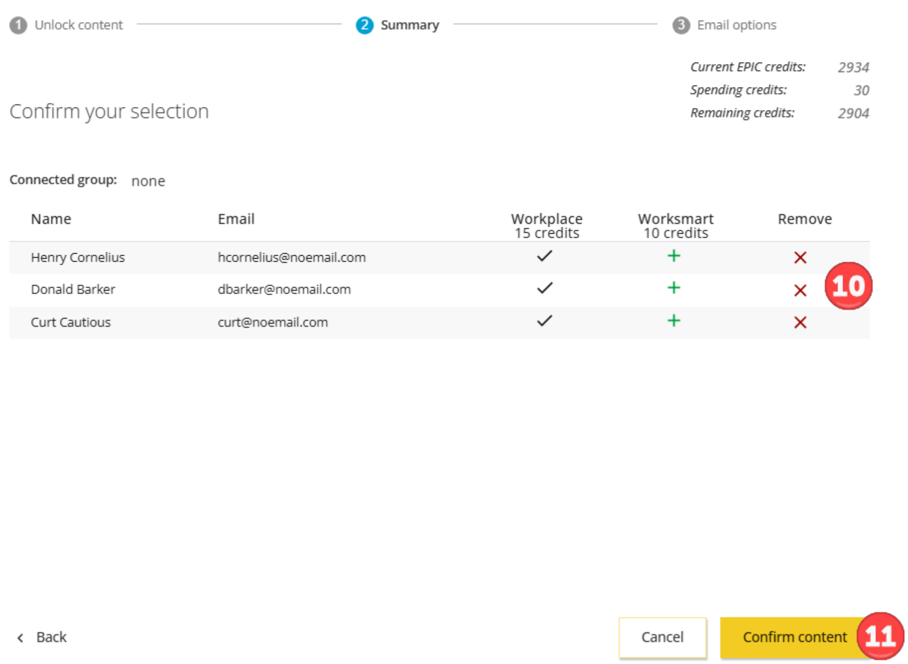
7. Click **Add learners**.



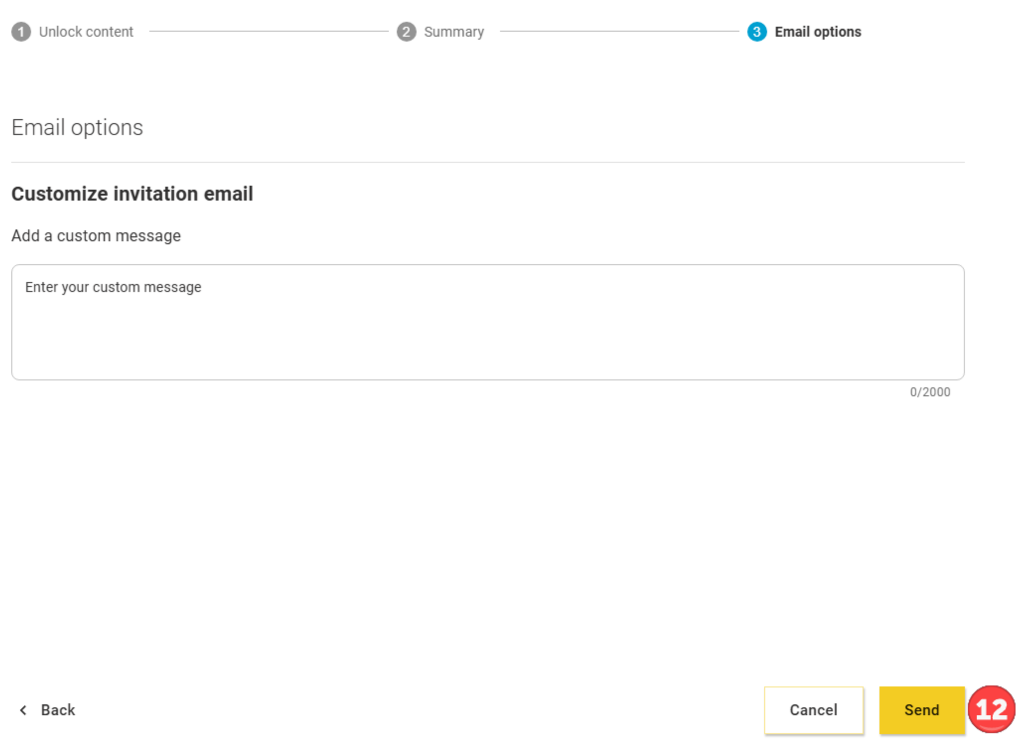
8. Select the content to unlock.
9. Click **Unlock content**.



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**.



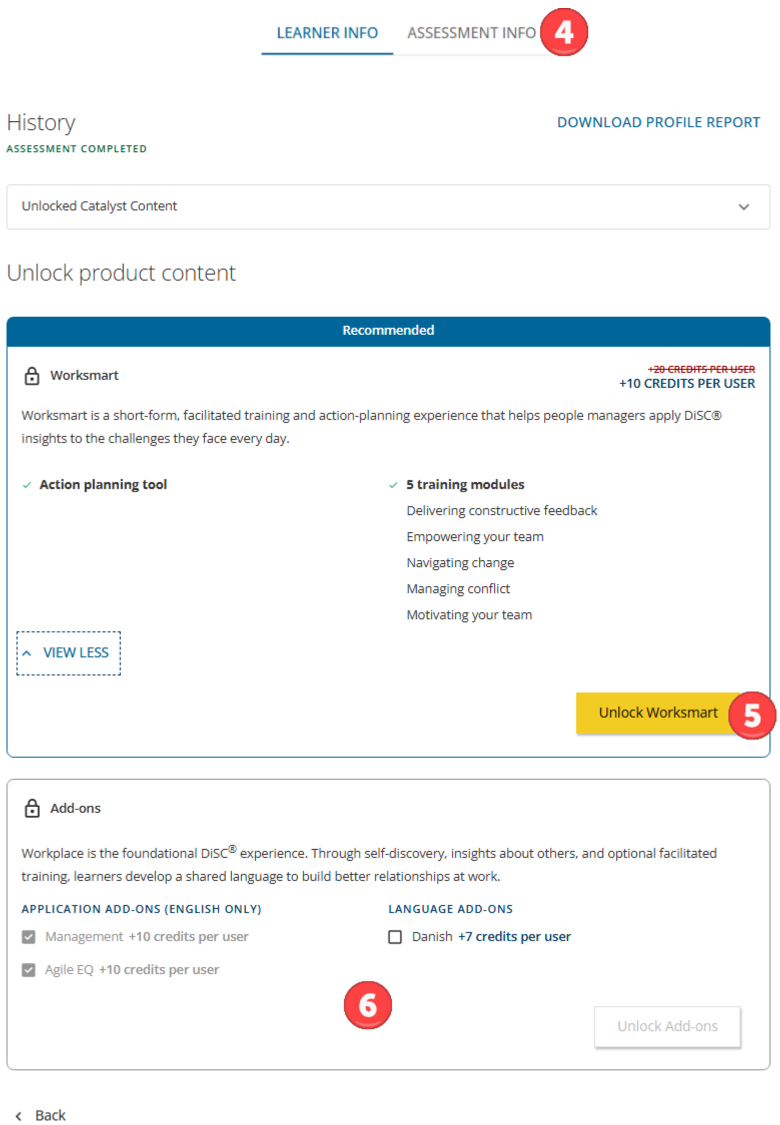
12. Enter a custom message, if desired, and click **Send**.



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**.



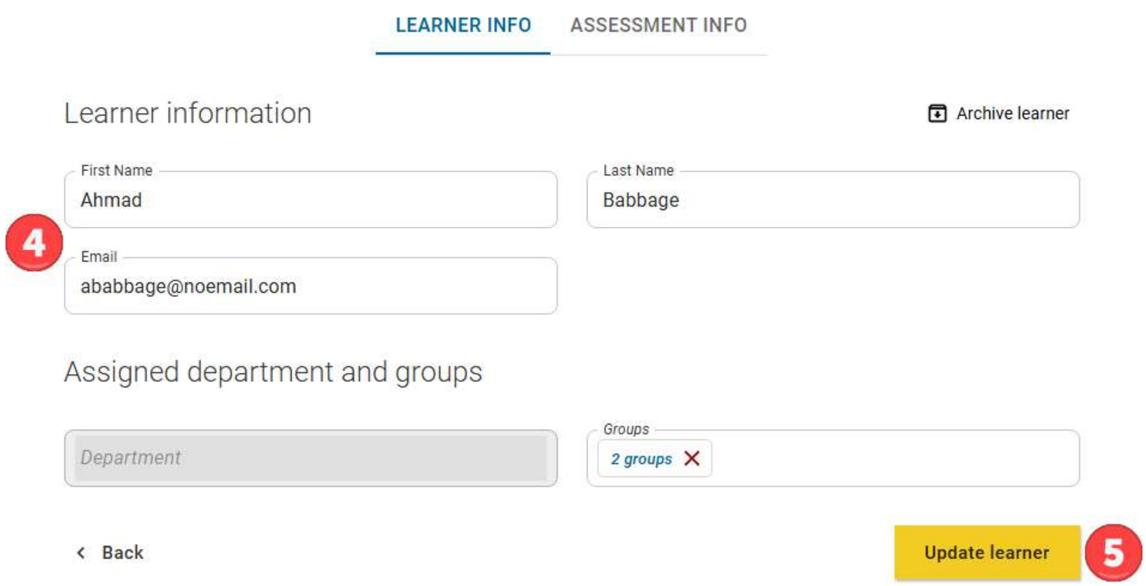
Update Learners

Name and Email

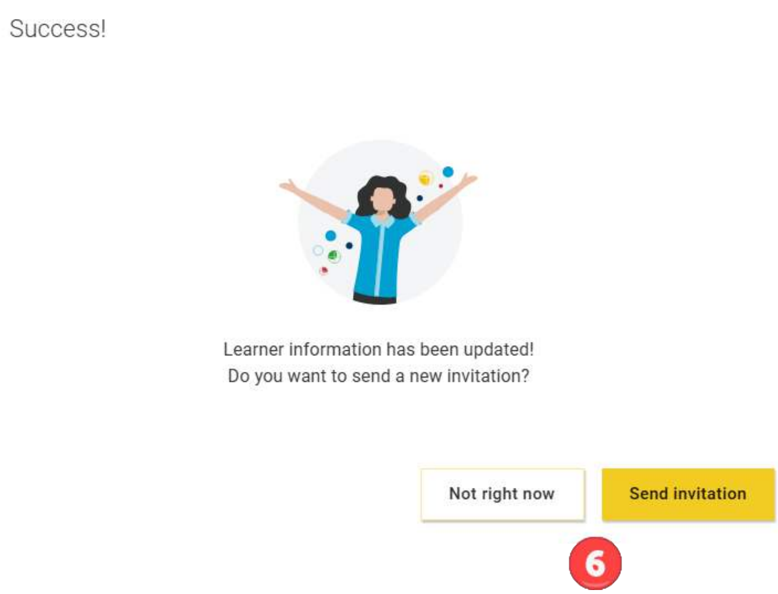
Administrators can update a learner from the list if the learner has not completed their assessment.

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**.



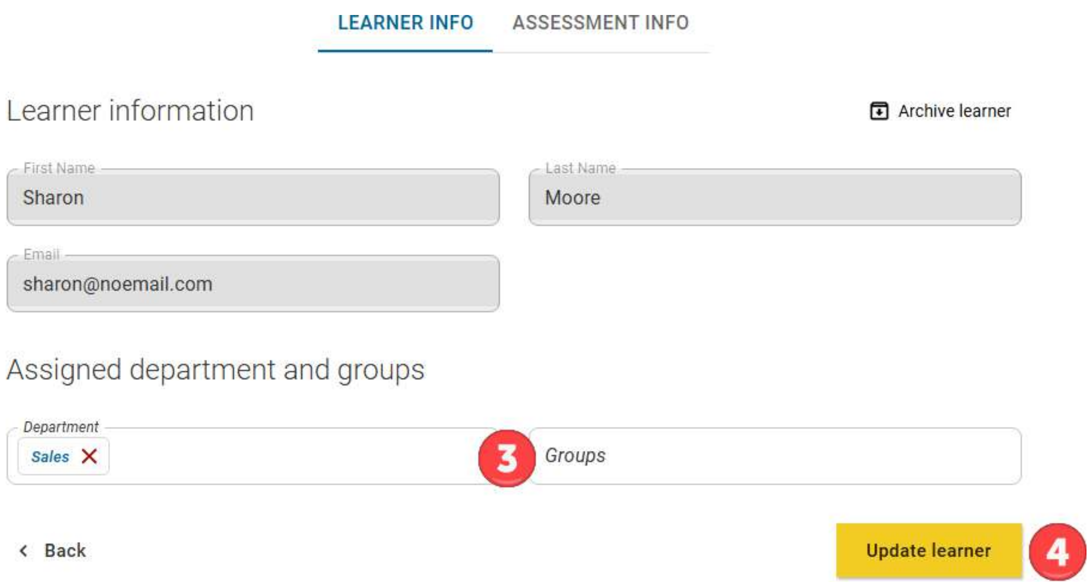
6. After saving changes, click **Send invitation** to send a new invitation email to the learner. Or click **Not right now** to save changes without sending a new invitation email.



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**.

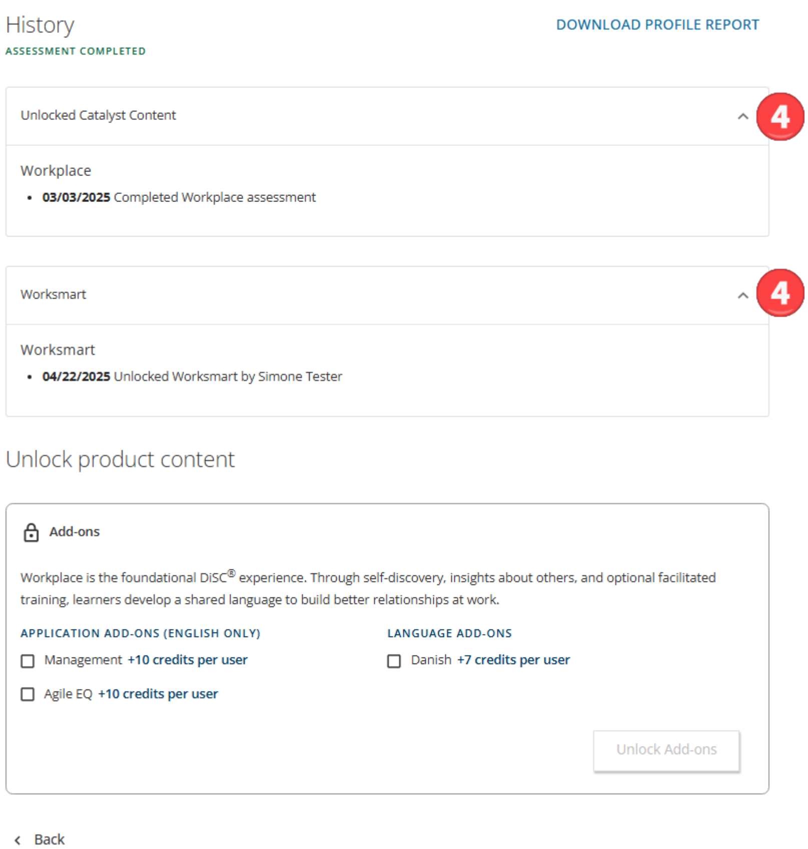


View a Learner's History

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.



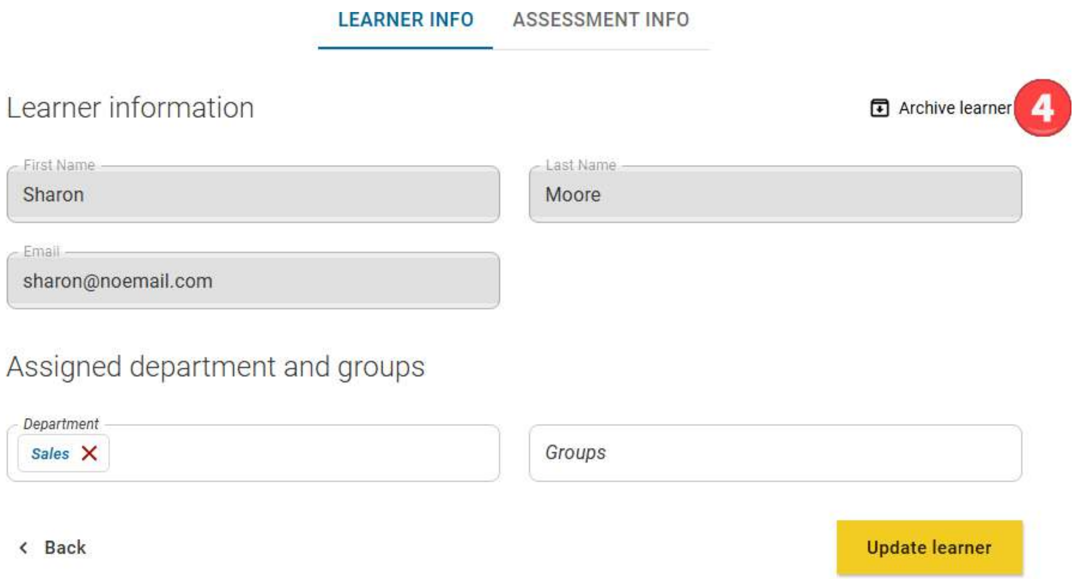
Archive Learners

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.

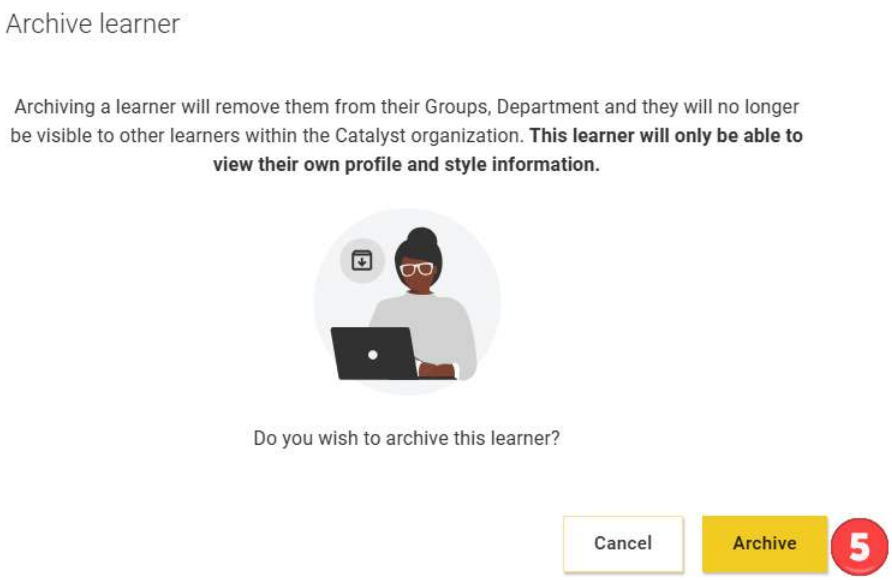
Individual Learner

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**.

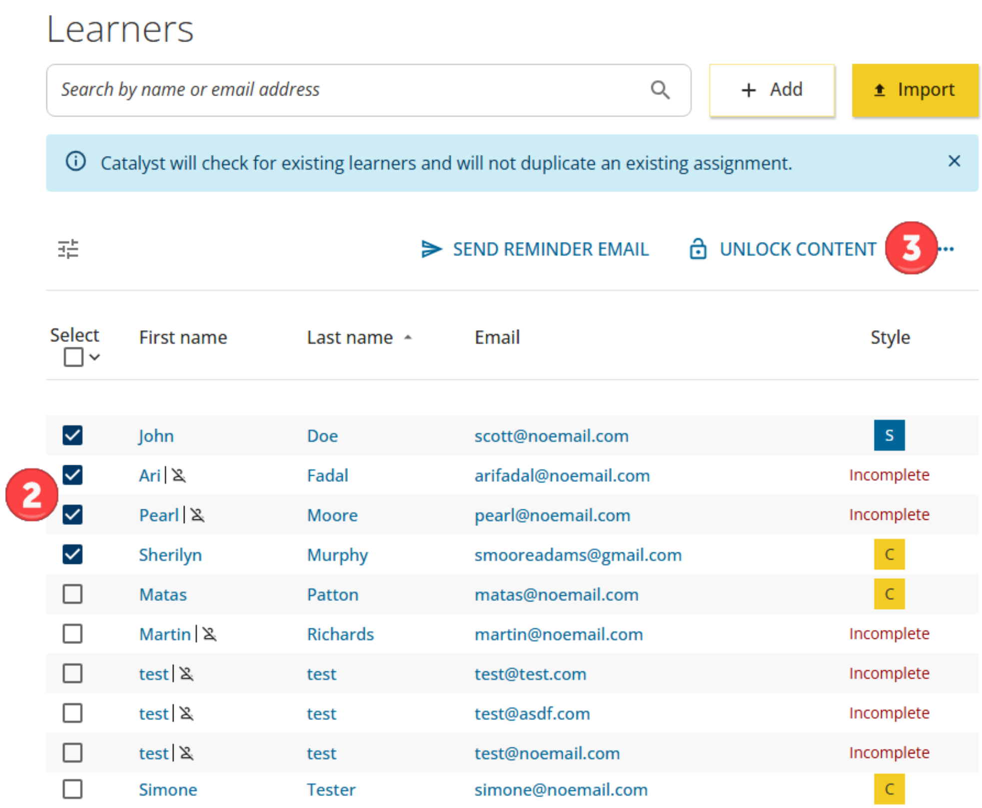


5. Click **Archive**.

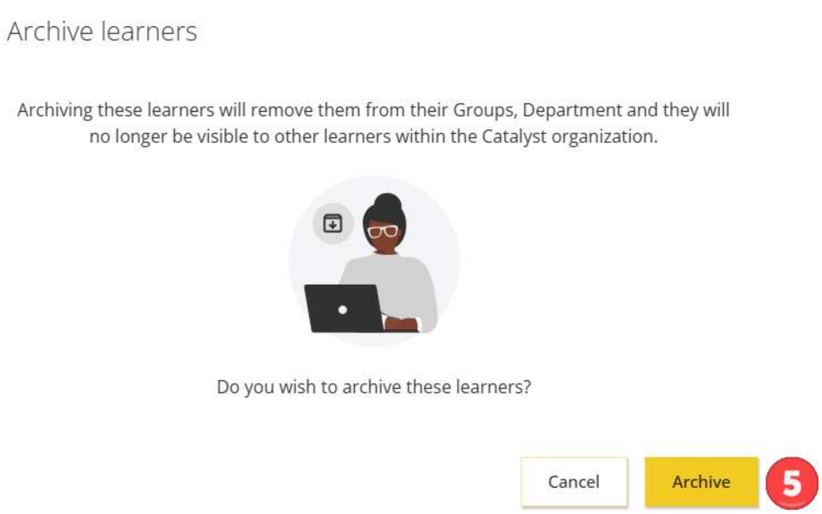


Multiple Learners

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**.



5. Click **Archive**.

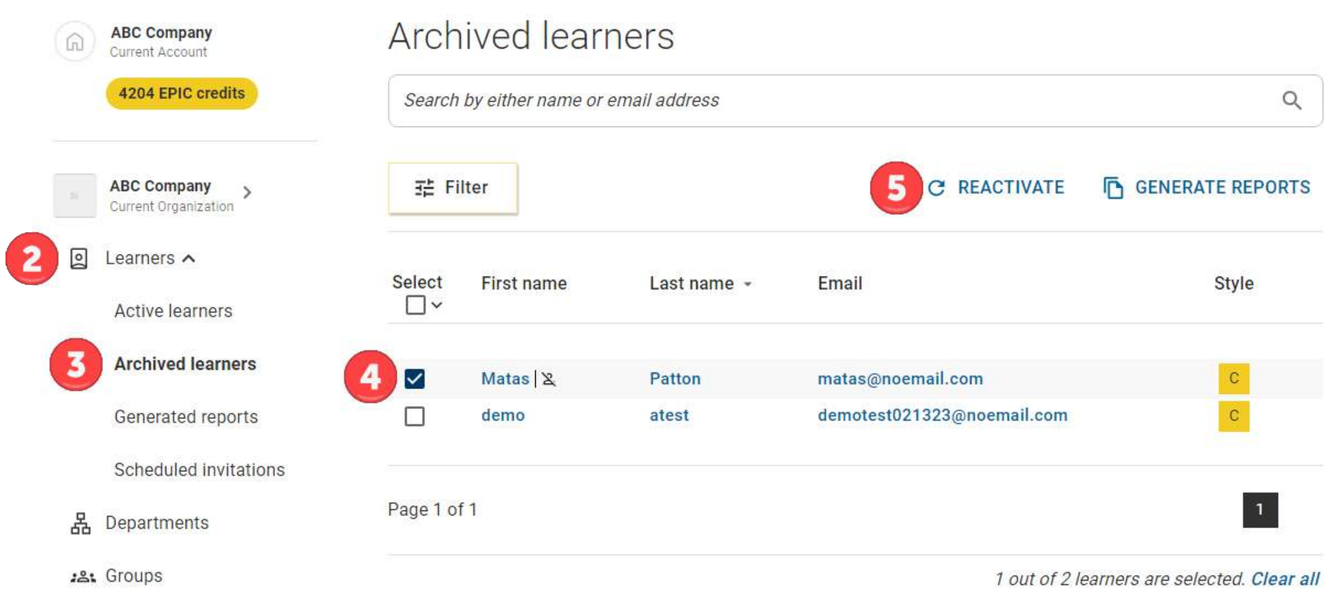


Reactivate Archived Learners

Archived learners can be reactivated at any time.

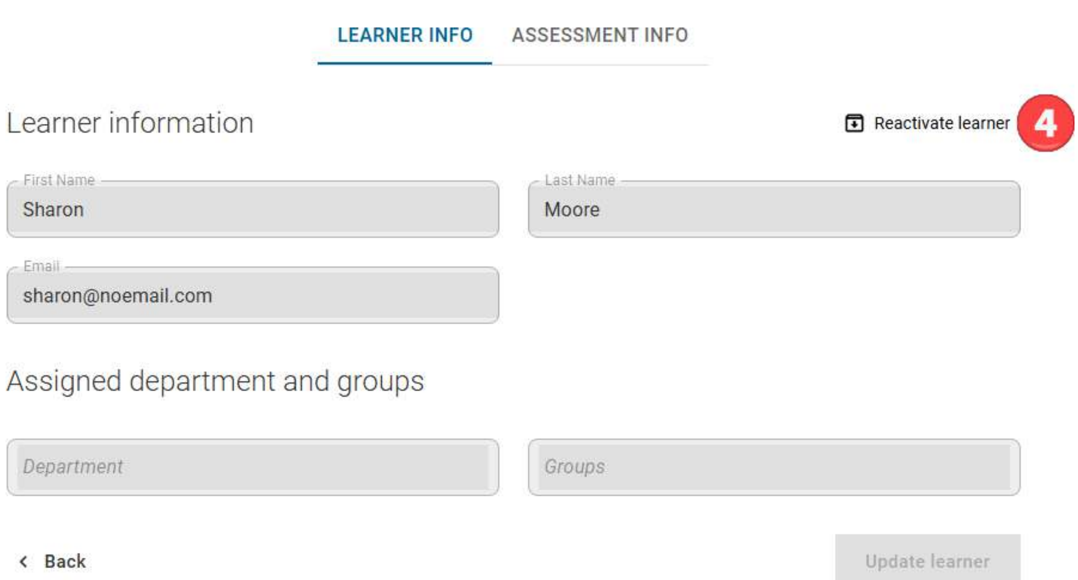
Multiple Learners

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**.

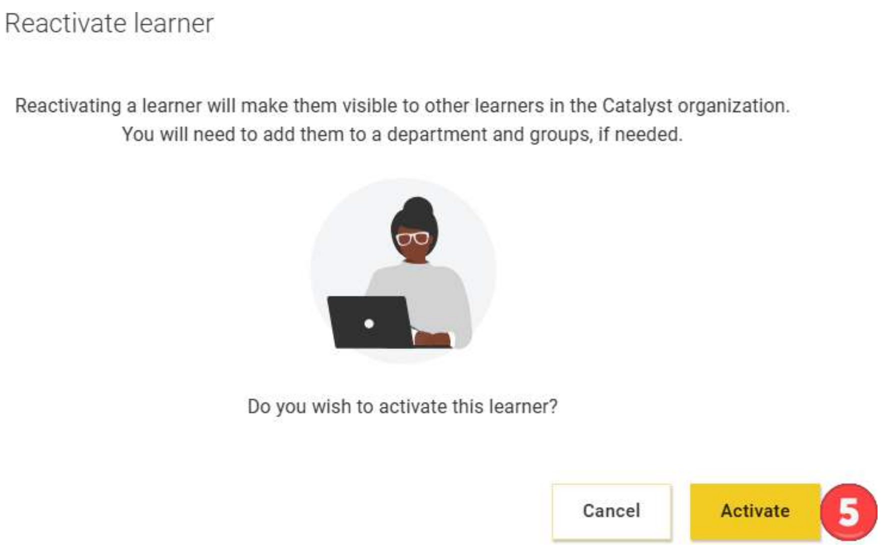


Individual Learner

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**.



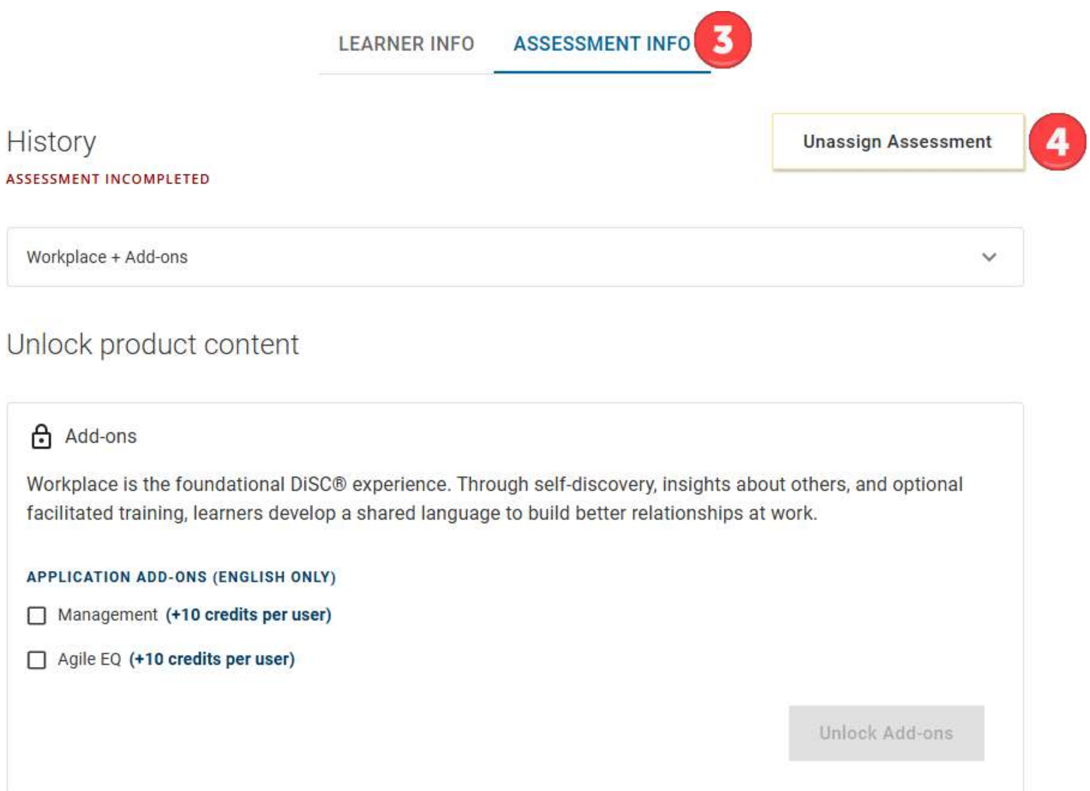
14. Click **Activate**.



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**.

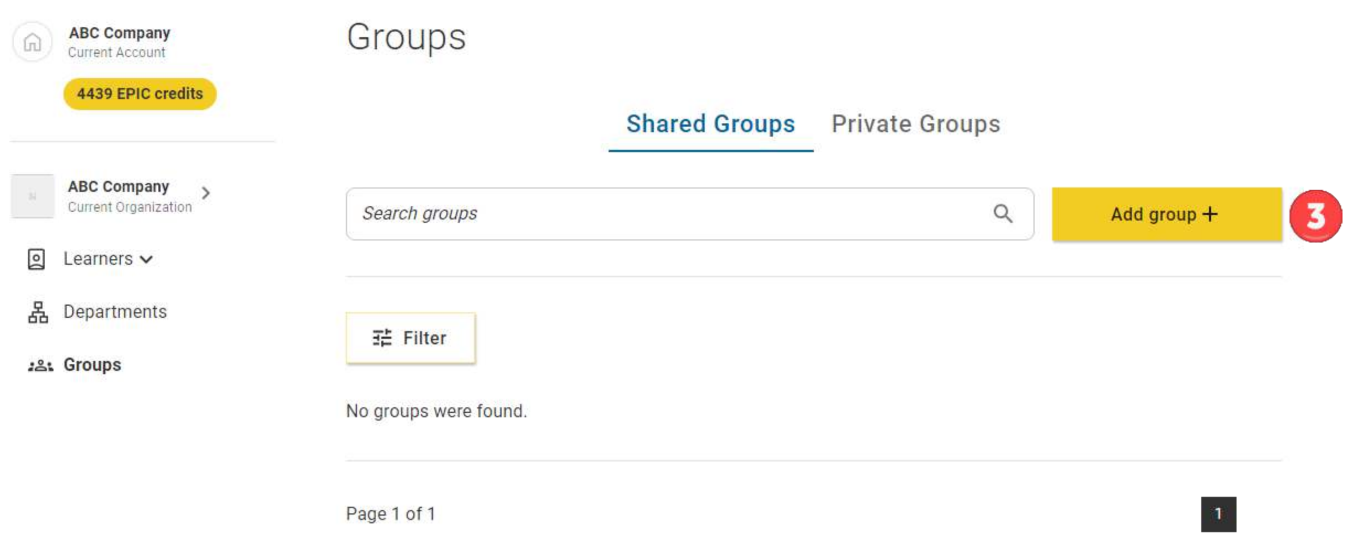


Groups

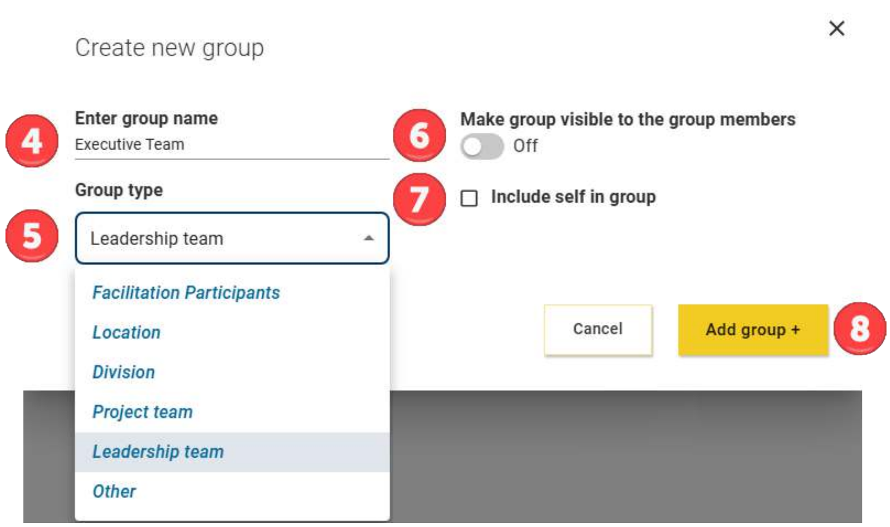
Administrators can create shared groups of learners that allow group members to see each other after completing their assessments. Administrators can also create private groups that are only available in the administrator experience. Private groups allow admins to organize learners for quicker retrieval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



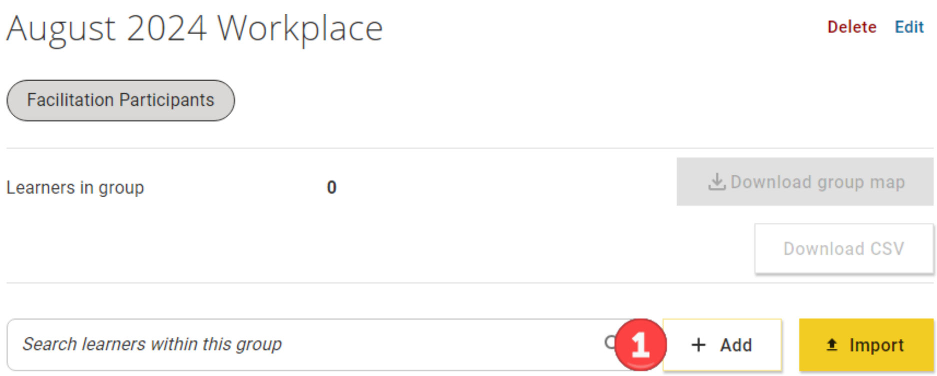
Manage Group Members

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.

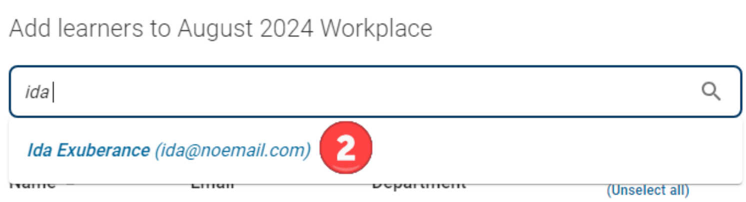
You can add people to a group one-by-one, in bulk, or you can even upload an import file.

Add People Individually

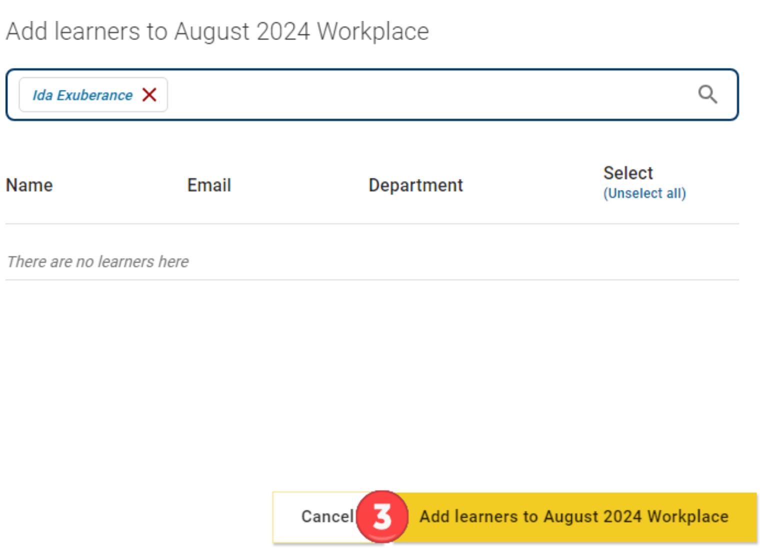
1. Click **+ Add** to access learners that belong to this organization.



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



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

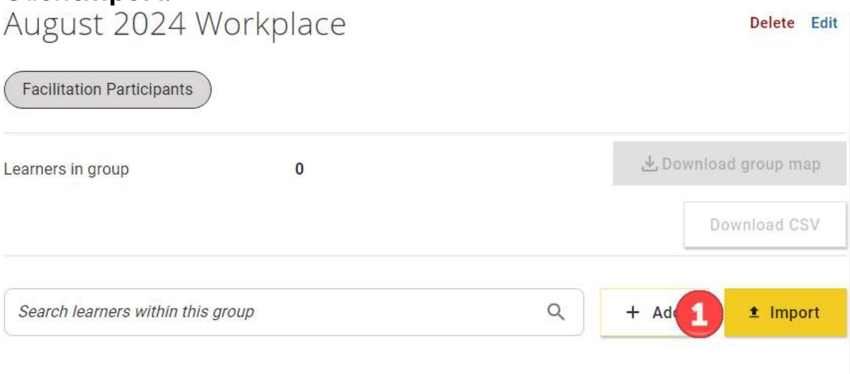


4. Click **Okay**.

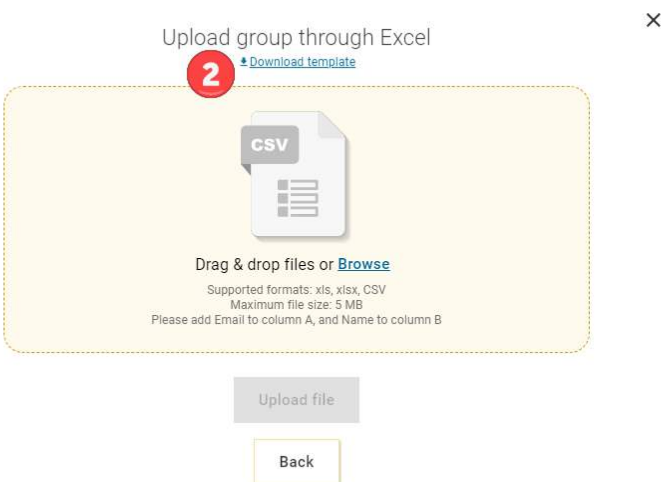
Bulk Import

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.

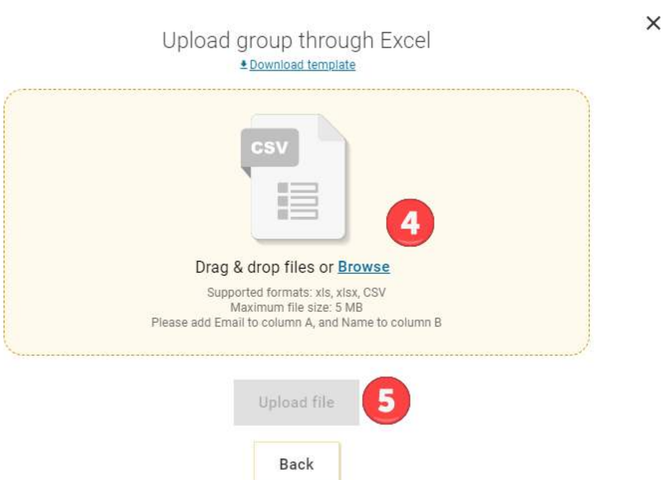
1. Click **Import.**



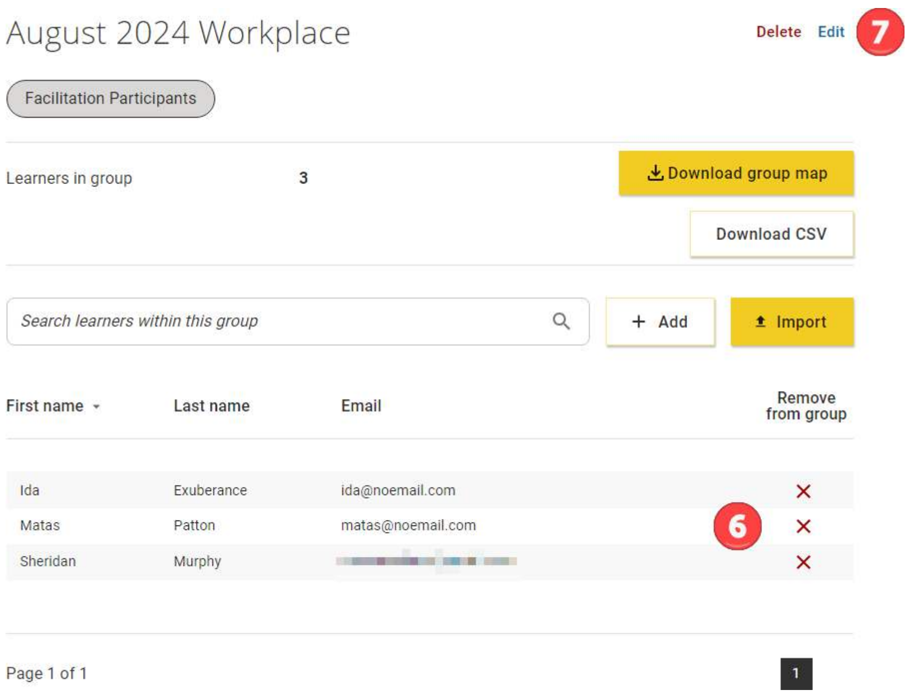
2. Click **Download template**.



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**.



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

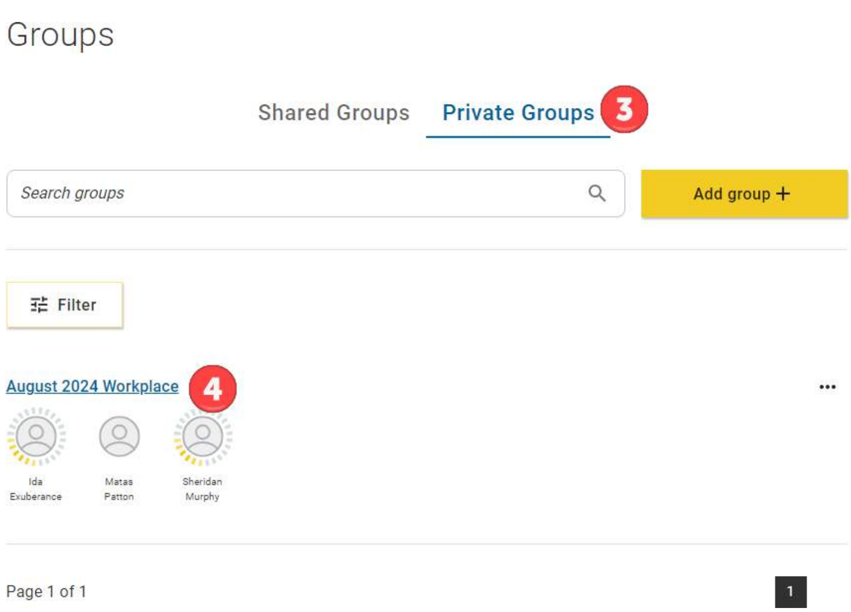


Download Group Information

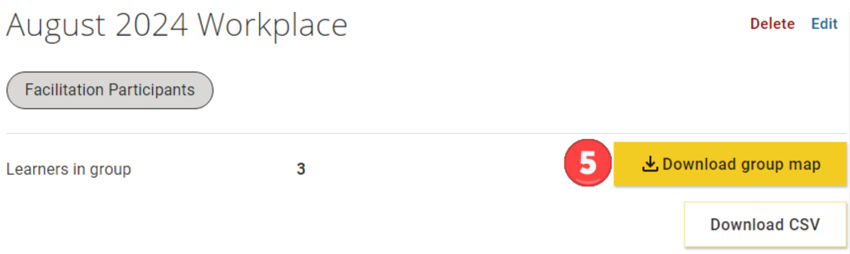
Group Map Image

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

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.



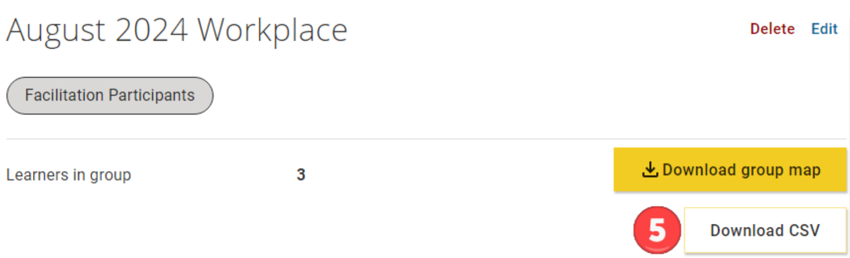
5. Click **Download group map**.



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**.



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**.