Catalyst EPIC Administration

Contents

Assign Access Codes

Use this process to create a new Everything DiSC on Catalyst report by entering individual names and email addresses, by importing a spreadsheet containing the names and email addresses, or by selecting someone with an existing, completed report in your EPIC account.

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

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

> Select or add an organization below by typing the organization name. Then click Next to continue.
>
> Learners assigned to the same organization will be visible to each other in the online platform. The organization selected here will apply to all learners assigned in this session.
>
> Organization:
>
> [   ] ●

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

> Organization:
>
> ABC capital ●
>
> **+ Add "ABC C"...**
>
> ABC (Always Being Creative) Graphic Greensboro Designs
>
> ABC Armstrong and Bonauer Lengnau **abc** Consulting GmbH

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

> **Add Organization**
>
> Enter the Name and City of the Organization below.
>
> Name:
>
> ABC Company ●
>
> City:
>
> Anywhere ●
>
> Organization Logo:
>
> **Required File Type:** *JPEG, PNG or GIF*
> **Recommended Size:** *750 X 750 pixels*
> **Recommended Resolution:** *300 dpi*
> *The system will automatically size your logo for optimal display in the EPIC system.*
>
> **Upload Logo**
>
> **Add**   **Cancel**

Note: Any organizations that you add can be edited later from the Manage Organizations page. Also, all EPIC primary and sub accounts will see the organization in the dropdown list. When you add an organization, it is visible to all EPIC users that have the Workplace on Catalyst product in their account.

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

> **Select Applications**
>
> Select the applications available to the learner on the Catalyst platform. All learners will have access to Workplace on Catalyst by default. If not added now, additional applications can be added at a future date.
>
> Check All | Uncheck All
> ☑ Workplace on Catalyst
> ☐ Management on Catalyst **(10 Credits)**
> ☐ Agile EQ on Catalyst **(10 Credits)**

5. Choose a folder and/or sub folder in which to create new Access Codes or select the New Folder link to create a new folder.
6. Choose Delivery and Auto Reminder Options.
7. Use one of the three available methods to add learners who will receive a Catalyst Access Code Email to complete their online assessment.

> Enter Individual Respondents: Enter an email address and a name for a learner; then click **Add**. Use this option for learners that have not completed an Everything DiSC assessment in the past.
>
> Import Respondents: Click **Upload** to upload and import a list of learners. The file must be an Excel worksheet (.xls or .xlsx). You can download a template on the Import Respondents tab.
>
> Use Existing Report: Click **Search** to locate and select learners with completed Everything DiSC access codes. When using a completed Everything DiSC respondent to create a new Workplace on Catalyst access code, the learner will not be required to take the DiSC portion of the assessment again. Their previous DiSC style scores will be used in the new report. When using a completed DiSC Classic report to create an Workplace on Catalyst access code, the learner's name and email address are carried forward, and the learner will complete the entire Workplace on Catalyst assessment. Use this option to upgrade existing learners and qualify for applicable discounts.

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

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

9. Click **Assign Access Codes**.
10. Click **OK** to confirm the credit deduction.
11. Click **OK** to customize the email to learners or click **Cancel** to have send the default email message. The confirmation page displays a summary of the product you just created, the learners who will receive an email, and EPIC credit activity associated with this transaction.

Change Learners' Organization

Organizations affect the learner's experience on the Catalyst platform, so it is critical that a learner's Workplace on Catalyst access code is assigned to correct organization. You can edit the access code's organization at any time.

Multiple Access Codes

1. Click **Batch Functions > Catalyst: Edit Organization** from the *Manage Reports* menu.
2. Select or add the new organization. This field works just like the Organization field when assigning a new access code.
3. Click **Add Reports**.
4. Select the search criteria and click **Search**.
5. Select access codes by clicking the box to the left of the name or click **Select All**.
6. Click **Next**.
7. Select the organization confirmation checkbox below the respondent list.

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

8. Click **Update Organization**.

One Access Code

1. Click **Edit Existing Reports** from the *Manage Reports* menu.
2. Search for the record you wish to edit.
3. Click the **Edit** link for the record.
4. Select or add the organization by typing in the Organization field. This field works just like the Organization field when assigning a new access code.
5. Select the organization confirmation checkbox below the respondent list.

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

6. Click **Save Changes**.

Add Applications to a Catalyst Access Code

1. Click **Catalyst: Add Applications to Access Codes** from the *Manage Reports* menu.
2. Use the search criteria to filter your results.
3. Select access codes by clicking the box to the left of the name. Then click **Next** to continue. To select all access codes returned by the search, click **Select All**.

4. Select the applications to add to the listed access codes.

Note the number of credits automatically update in the Catalyst Access Code List as applications are added.

Catalyst Access Code List

Listed below are the reports that will be affected. You can edit the list by using the **Add Reports** button, or clicking ✖ to remove. Click **Save** to complete your action(s).

Email	Name	Status	Catalyst: Workplace Enabled	Catalyst: Management Enabled	Catalyst: Agile EQ Enabled
✖ jaiken@noemail.com	James Aiken	Pending	Yes	No	Yes
✖ matas@noemail.com	Matas Patton	Complete	Yes	No	Yes
✖ celia@noemail.com	Celia Vargas	Pending	Yes	No	Yes
✖ frank@noemail.com	Franklin Duncan	Pending	Yes	No	Yes
✖ janet@noemail.com	Janet Smith	Pending	Yes	No	Yes
✖ smarch@wiley.com	Greg Baldwin	Pending	Yes	No	Yes
✖ sample@noemail.com	Justin Sample	Pending	Yes	No	No

Total Reports: **7**
Total Credits: **70**

5. Click **Next** to add the application(s). A notification email is sent to the learners.

Generate Everything DiSC on Catalyst Profiles

One Profile

Use this function to create one PDF document for viewing, printing or emailing. Each time a report is generated, EPIC grabs the most up-to-date information to pull into the report. Because EPIC does not store individually generated reports, completed reports can be generated for viewing an infinite number of times without credits being charged.

1. Click **View/Print/Email Completed Reports** from the *Manage Reports* menu.
2. Use the Search function to locate a report.
3. Click the **Select** link next to the report.
4. Select the content to include.
5. Click **Next**.
6. Click **View**, **Save**, or **Email** after EPIC generates the report.

Multiple Profiles

1. Click **Generate Reports for Download** from the Batch Functions section of the *Manage Reports* menu.
2. Use the Search function to locate the reports.
3. Click the checkbox next to the reports.
4. Overwrite the default file name if you choose (this can help you locate the .ZIP file later).
5. Select the content to include.
6. Click **Next** to review and edit the list of reports.
7. Click **Generate Batch**. A message appears letting you know the approximate time this batch of reports will take to generate.
8. Click **OK**.

Manage Organizations

Click **Manage My Organizations** from the *Manage Your Account* menu. A list of all organizations associated with Catalyst access codes in your account appears.

Create an Organization

1. Click **Create New Organization** to add an organization that does not already exist in the Organization dropdown list.
2. Enter a name and city. Optionally, click the Upload Logo button to select a logo.

3. Click **Save**. When you add an organization, it is visible in the Organization dropdown list to all EPIC users that have the Workplace on Catalyst product in their account.

Edit an Organization

1. Click the **Edit** link next to an organization to modify the organization name, city, or logo.

Edit Organization

Modify the Name and City of the Organization below.

Name:

ABC Company ●

City:

Anywhere ●

Organization Logo:

Required File Type: JPEG, PNG or GIF
Recommended Size: 750 X 750 pixels
Recommended Resolution: 300 dpi
The system will automatically size your logo for optimal display in the EPIC system.

Upload Logo

Save   Cancel

4. Click **Save**.

Delete an Organization

Organizations that you created and are not associated with any learners may be deleted.

1. Click the **Delete** link to the right of the organization name.

Manage My Organizations

Click the **Create New Organization** button to create a new organization.

Create New Organization

📁 **ABC Company**, Anywhere   Edit | Delete

2. Click **OK** to confirm.

Add Departments

1. Click **Add Department** to the right of the organization. A popup will appear.

2. Enter the department name.
3. Click **Add Department** to save the department. The department will be visible in EPIC and in Catalyst on the registration page and the account settings page.
4. Click **Cancel** to close the window and not create the department.

Rename Departments

1. Click **Edit** to the left of the department.

2. Enter the new department name.
3. Click **Rename Department** to save the new name. The new name will be visible in EPIC and in Catalyst on the registration page and the account settings page.
4. Click **Cancel** to close the window and not rename the department.

![Everything DiSC Workplace / Catalyst logos]

Delete Departments

If a department does not have any learners, the Delete option appears to the right of the department.

1. Click **Delete**. A confirmation message appears.

   Are you sure you want to delete this Organization?

   [OK]   [Cancel]

2. Click **OK** to delete the department.
3. Click **Cancel** to return to the Manage My Organizations page.
   Deleted departments no longer appear for Catalyst learners that belong to the organization. Deleted departments no longer appear on the Manage My Organizations page – for anyone that has access to the organization.