

Catalyst EPIC Administration

Contents

| | |
|--|---|
| Assign Access Codes..... | 1 |
| Change a Learner’s Organization | 3 |
| Generate Workplace on Catalyst Profiles..... | 3 |
| One Profile..... | 3 |
| Multiple Profiles | 3 |
| Manage Organizations | 4 |

Assign Access Codes

Use this process to create a new Everything DiSC Workplace 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.

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

Product Family:

Product:

Language:

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

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

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

Organization:

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

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

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. 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.
5. Choose Delivery and Auto Reminder Options
6. 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.

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 **Assign Access Codes**.
9. Click **OK** to confirm the credit deduction.
10. 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 a Learner's 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.

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. Click **Save Changes**.

Generate Workplace 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 which 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 which 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

1. Click **Manage My Organizations** from the *Manage Your Account* menu. A list of all organizations created in your EPIC account appears.
2. Click **Create New Organization** to add an organization that does not already exist in the Organization dropdown list.
3. Enter a name and city before clicking **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.

Create Organization

Enter the Name and City of the Organization below.

Name:
 ●

City:
 ●

Save
Cancel

4. Click the **Edit** link next to an organization to modify the organization name or city.

Edit Organization

Modify the Name and City of the Organization below.

Name:
 ●

City:
 ●

Save
Cancel

5. Click **Save**.