

# Administrator Experience Quick Reference Guide

Last Updated: June 25, 2025

Action	EPIC	Catalyst
<b>Assessments and Upgrades</b>		
Assign Catalyst assessment to new learner	Manage Reports > Create new report/Issue access code	Account <sup>1</sup> > Organization > Learners > Click the + Add button.
Bulk assign Catalyst assessments to new learners	Manage Reports > Create new report/Issue access code	Account <sup>1</sup> > Organization > Learners > Click the Import button.
Upgrade existing learners to Catalyst	Manage Reports > Batch Functions > Catalyst: Upgrade from Existing Reports	<i>Not applicable; upgrades are only available in EPIC.</i>
Identify incomplete assessments for an organization	Manage Reports > Edit Existing Reports > Select 'Pending' access code status and relevant folders before entering the Organization name	Account <sup>1</sup> > Organization > Learners > Click Filter and select Incomplete
Send unscheduled ("on-the-fly") assessment reminder(s)	Manage Reports > Resend Login Info	Account <sup>1</sup> > Organization > Learners > Select learner(s) and click Send Reminder.
View and/or edit pending invitations and reminders	Manage Reports > Batch Functions > Edit Delivery Options for Access Code Groups	Account <sup>1</sup> > Organization > Learners > Scheduled Invitations
<b>Applications/Content</b>		
Add Agile EQ and/or Management content to existing Catalyst learner(s)	Manage Reports > Catalyst: Add Applications to Access Codes	Account <sup>1</sup> > Organization > Learners > Select learner(s) and click Unlock Content.
Add Worksmart to existing Catalyst learner(s)	<i>Not applicable; Worksmart assignments are only available in the Catalyst Administrator Experience.</i>	Account <sup>1</sup> > Organization > Learners > Select learner(s) and click Unlock Content.
<b>Reports</b>		
Generate PDF report (i.e., "profile") for Catalyst learner(s)	Manage Reports > View/Print/Email Completed Reports	Account <sup>1</sup> > Organization > Learners > Select learner(s) and click Generate Reports.
Generate activity reports	Manage Your Account > Account Activity Reports	Not available at this time.
Create a downloadable DiSC map for a group of learners	Manage Reports > Create new report/Issue access code > Everything DiSC Group Culture Report	Account <sup>1</sup> > Organization > Groups > Add Group > Download Group Map
<b>Learner, Organization, and Department Maintenance</b>		
Search for a learner by name or email address when you do not know their organization	Manage Reports > Edit Existing Reports	Not available at this time.
Edit the name or email address associated with a Catalyst assessment	Manage Reports > Edit Existing Reports	Account <sup>1</sup> > Organization > Learners > Click learner's name or email address.
Move a learner to a different organization	Manage Reports > Edit Existing Reports > Search and select the access code to edit the Organization.	Not available at this time.
Reclaim unused credits / Unassign an assessment	Manage Your Account > Unassign Access Codes/Reclaim Credits > Search > Select access codes > Click the Unassign Access Codes button	Account <sup>1</sup> > Organization > Learners > Click learner's name or email address > Click the Unassign assessment button
Archive a Catalyst learner	<i>Not applicable; archiving a learner is only available in the Catalyst Administrator Experience.</i>	Account <sup>1</sup> > Organization > Learners > Click learner's name or email address > Click the meatball menu > Click Archive Learner
Edit organization name, location, and/or logo	Manage Your Account > Manage My Organizations	Account <sup>1</sup> > Organization > Click the organization's name from the left sidebar.
Manage Catalyst departments	Manage Your Account > Manage My Organizations	Account <sup>1</sup> > Organization > Departments

<sup>1</sup> Only Administrators that have synced more than one EPIC user with their Catalyst user must select an Account before selecting an Organization.