Catalyst Administrator Experience

Managing organizations, learners, departments, and groups

Last updated: September 15, 2025

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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. Create groups of interdepartmental and cross-functional teams within the same organization. And the Catalyst administrator can organize learners into these Departments and Groups.
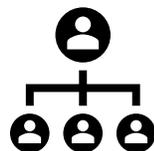
Departments   Groups

Content refers to the DiSC-related information and insights made available to learners following completion of their assessments. As part of the core Catalyst experience, all learners are granted access to Workplace content. Administrators have discretion over when, or if, additional content—such as Worksmart, Management, and Agile EQ—is made accessible to learners. Unlocking Catalyst content requires credits from the designated EPIC account.

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.
   - **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.**
   - **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:	Synchronize my EPIC and Catalyst users ⌄	**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 ░░░░░░░ will be synced with the Catalyst profile ░░░░░░░. 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		

☑ Send notification email when a respondent completes a profile

Name	Bridget Corruthers	Username	bcorruthers	✖
Email	bcorruthers@noemail.com	User Level	Super Administrator
Learner Email	**Catalyst user is not Synced**		

☑ 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**.

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.

Home

Learner
Experience

Account Settings

Exit

EVERYTHING DiSC
A Wiley Brand

Go to
Learner →

Hi Sara

Log out

Catalyst.

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GoodStudio/shutterstock.com.

Tech support

Hours
Daily, 24 hours

Email
catalystsupport@wiley.com

Phone

Americas	+1 763-762-9025
EMEA	+44 186 552 1556
Asia / Australia	+61 7 3703 1694

More information

Manage cookies

Terms of use

Privacy

Accessibility

Other questions?

kewittnebe@wiley.com

WILEY

Technical Support

DiSC Program
Administrator

Technical 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 Catalyst Administrator header to open your user 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.

5. Click the **Practitioner experience** tab to enter your serial number to unlock the facilitator library and Practitioner Experience features.

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 synchronize 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.
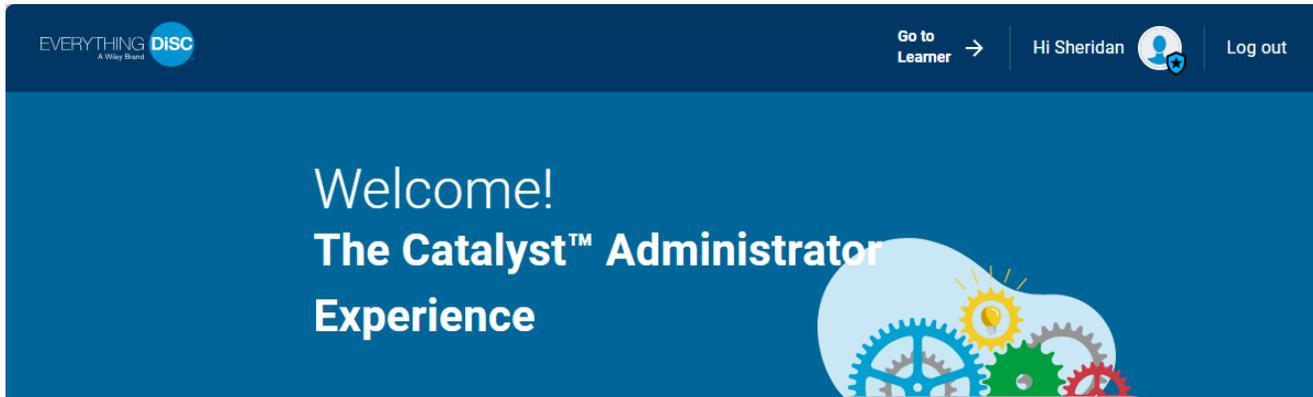
Organizations

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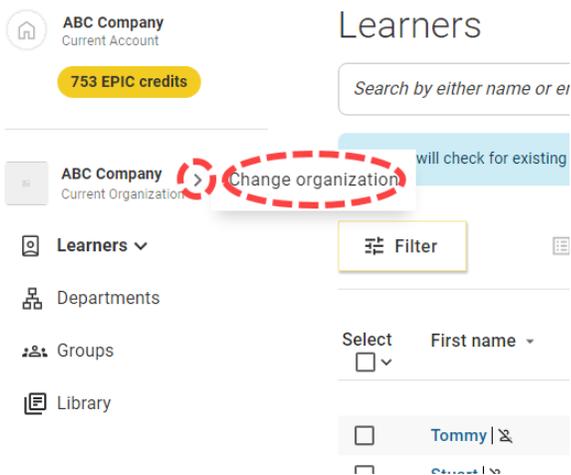
If you synchronized your Catalyst user with multiple EPIC accounts, you might need to change accounts before switching organizations. In that case, first click the "home" link to pick a new account so you can then select a different organization.
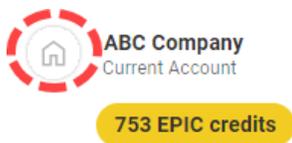
Create Organizations

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**.
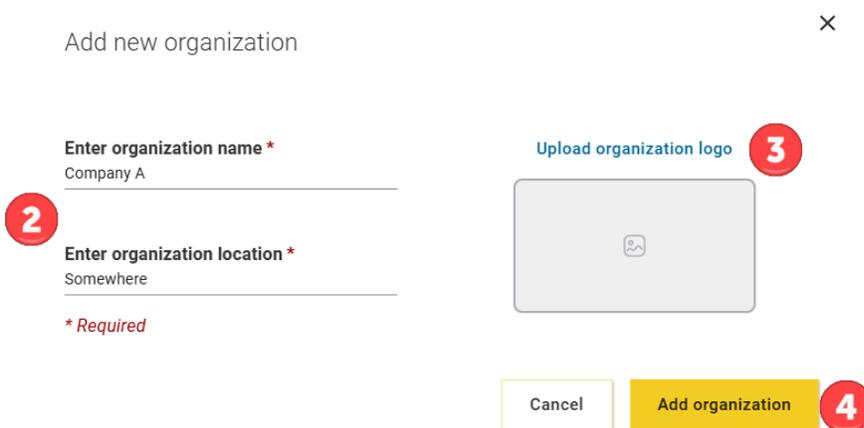
Update Organizations

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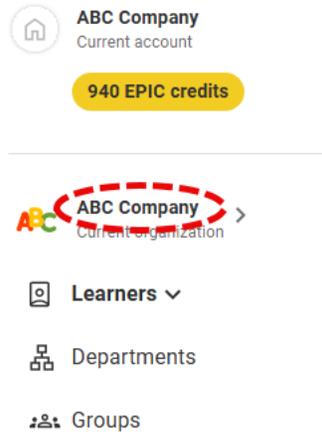
3. Click the corresponding **Edit** link to update the name, logo, or location.
4. Click the corresponding **View** link to see a list of learners who have completed an assigned assessment.
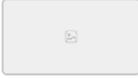
Delete Organizations

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.
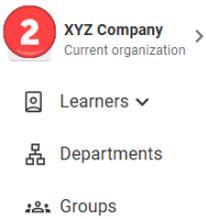
3. Click **Delete organization**.
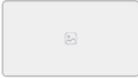
Departments

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 +**.

Departments

Search departments   **3**   Add department +

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

Add new department   ×

Enter department name *
Name   **4**

* 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 ⋯ to the right of the department.
4. Click **Edit** to change the department name.
5. Click **Transfer** 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 it by the 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. Or select their name from the list of learners without departments.

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

8. Click **Confirm**.
9. 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's information into the template and save.

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

Import learners to department

⬇ Download template

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

You selected *Sales Dept Upload.xlsx*
Supported formats: xls, xlsx, CSV
Maximum file size: 5 MB

7 Import   Cancel

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.

Import status

(i) 2 learner(s) imported successfully.   ✕

8

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

Review errors   Download learners with errors **9**

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

Exit **10**

Remove Learners from a Department

From the Learner Record

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.

LEARNER INFO   ASSESSMENT INFO

Learner information   ⬆ Archive learner

First Name
Marsha

Last Name
Manager

Email
marshamanager@noemail.com

Assigned department and groups

Department
Sales ✕ **3**

Groups

‹ Back   Update learner

4. Click **Update learner**.

From the Department Record
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**.

Departments

Department name	Learners in department ▾	
Sales	5	⋯
Customer Service	2	⋯
Technology	0	⋯
Human Resources	0	⋯

Search departments 🔍   Add department +

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

Edit
Transfer
Delete

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

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   Transfer

Search learners within this department 🔍   + Add   ⬆ Import

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

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.

Sales

| 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

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

Transfer department

Search by department name 🔍

Name	Number of people in department ▾	Select
Editors	105	☐
Sales	88	☐
Technology	84	☑ **5**
People Organization	80	☐

Cancel **6**   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. Adjust the **Reveal style** slider to determine if the Learners should see content related to their DiSC style immediately after completing their assessment.
7. Click **Add Learner**.

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

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

Current EPIC credits: 260
Spending credits: 70
Remaining credits: 190

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

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:
  - Giving constructive feedback
  - Managing conflict
  - Empowering your team
  - Helping your team navigate change
  - Motivating your team

‹ Back

Cancel   **Unlock content** ⑧

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

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

Email options

Scheduling

Send invitation email:　　　　● Now
　　　　　　　　　　　　　　○ On selected date　　　　08/27/2025 📅　　04:38 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

10. Click **Confirm transaction**.

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

Current EPIC credits: 260
Spending credits: 70
Remaining credits: 190

Summary

Learners　　　　　　　　　　　　　　　　　　　　　　EDIT ✏

Total:　　　　　　　　2
Connected groups:　　—
Reveal style:　　　　👁 Revealed

Content　　　　　　　　　　　　　　　　　　　　　　EDIT ✏

Product ▲	Learners	Credits
Workplace	2	30
Worksmart	2	40

Email options　　　　　　　　　　　　　　　　　　　EDIT ✏

Send invitation email:　　　08/27/25 at 04:39 pm
Send reminder email:　　　　Never
Email template language:　　English
Custom message:　　　　　　—

‹ Back　　　　　　　　　　　　　　　　　　　Cancel　　Confirm transaction ⑩

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**.

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

Learner Import status:

⊘ 10 errors were found regarding learner information. You must correct all errors to continue. ✕

Review errors

First name
Lily

Last name
Pad

Email

Email is a required field.

First name

Last name
Davis

Email

First name is a required field.

Email is a required field.

First name
Jonathan

Last name
Fisher

Email

Email is a required field.

First name

Last name

Learner email address *

< Back

Cancel

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. Adjust the **Reveal style** slider to determine if the Learners should see content related to their DiSC style immediately after completing their assessment.
9. Click **Add Learner**.

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

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

Current EPIC credits: 260
Spending credits: 210
Remaining credits: 50

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

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:

  Giving constructive feedback

  Managing conflict

  Empowering your team

  Helping your team navigate change

  Motivating your team

‹ Back   Cancel   Unlock content **10**

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

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

Email options

Scheduling

Send invitation email: ● Now   02/22/2024 🗓   10:00 PM 🕐
○ On selected date

Send reminder email: ● Never   02/22/2024 🗓   10:00 PM 🕐
○ If not completed by

Customize invitation email

Add a custom message

    Enter your custom message

0/2000

‹ Back   Cancel   Send assessments 11

12. Click **Confirm transaction**.

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

Current EPIC credits: 260
Spending credits: 210
Remaining credits: 50

Summary

Learners   EDIT ✏

Total:	6
Connected groups:	—
Reveal style:	👁 Revealed

Content   EDIT ✏

Product ▲	Learners	Credits
Workplace	6	90
Worksmart	6	120

Email options   EDIT ✏

Send invitation email:	08/27/25 at 04:43 pm
Send reminder email:	Never
Email template language:	English
Custom message:	—

‹ Back   Cancel   **Confirm transaction** 🔴12

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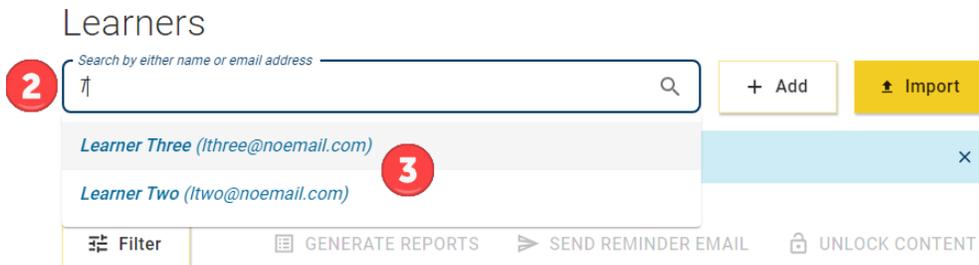
But you can also filter your learners by assessment status, product content, groups, and departments.

1. From the _Organizations_ page, click the organization name.
2. Click **Filter**.
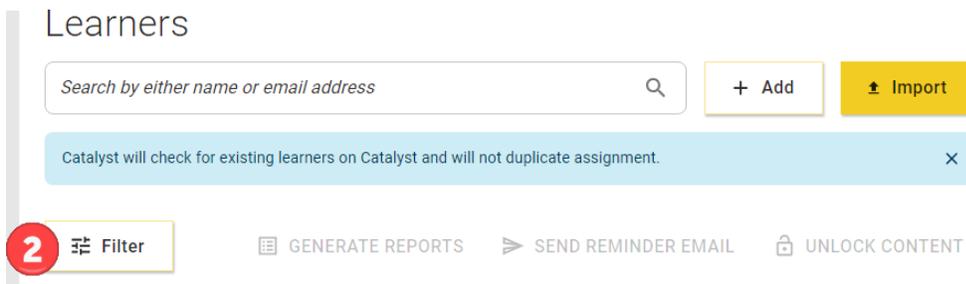
3. Select filters:
    a. Assessment Status – Complete or incomplete
    b. Style Status – Revealed or hidden
    c. Product Content (Locked or Unlocked) – Worksmart, Agile EQ, Management, and Danish
    d. Groups – Search by group name
    e. Departments – Search by department name
4. Click **Update**.

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.

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**

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.

Reveal Style

When assigning Catalyst to new learners, their DiSC style is shown by default after they complete the assessment. Administrators can choose to hide this information initially and reveal it later, such as after training.

Multiple Learners

Reveal DiSC styles for multiple learners at the same time.

1. From the _Organizations_ page, click the organization name.
2. Select one or more learners.
3. Click the meatball ⋯ menu above the list of learners.
4. Click **Reveal style**.

5. Click **Reveal styles** to confirm.

Individual Learners

You can reveal an individual learner's DiSC style directly from their learner record.

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 **Reveal Style**.

6. Click **Reveal style** to confirm.

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. Click **Add learners**.

① Select Learners ————— ② Unlock content ————— ③ Email options ————— ④ Summary

Select Learners

Search by name or email address

ⓘ **Connect to group:** Enter group name to search 🔍

Name	Email	Remove
Stephanie Choi	schoi@inscapepublishing.com	✕
Rahim Abadi	rabadi@inscapepublishing.com	✕
Elena Ali	eali@inscapepublishing.com	✕

Cancel   Add learners **4**

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

① Select Learners ─────── ② Unlock content ─────── ③ Email options ─────── ④ Summary

Current EPIC credits: 260
Spending credits: 21
Remaining credits: 239

Unlock content

RECOMMENDED

Worksmart ○

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:**
    Giving constructive feedback
    Managing conflict
    Empowering your team
    Helping your team navigate change
    Motivating your team

⑤

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)   **LANGUAGE ADD-ONS**

☐ Management +10 credits per user ⓘ   ☑ Danish +7 credits per user

☐ Agile EQ +10 credits per user ⓘ

‹ Back   Cancel   Unlock content **⑥**

7. Enter a customer message, if desired, and click **Send**.

① Select Learners ——— ② Unlock content ——— **❸ Email options** ——— ④ Summary

Email options

Customize invitation email

Email template language
Danish ▾

Add a custom message
Note: custom message will not be translated.

Enter your custom message

0/2000

‹ Back   Cancel   **Send** 🔴7

8. Click **Confirm transaction**.

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 columns A, B and C for each learner.

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 **Import**.

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

Upload learners   *Current EPIC credits:* 75

3 ⬇ Download template

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

CSV **5**

You selected *CatalystLearnersTemplate2.xlsx*
Supported formats: xls, xlsx, CSV
Maximum file size: 5 MB

Cancel   Import **6**

7. Click **Add learners**.

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

Add learners

⊘ All 2 learners imported successfully. ✕

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

ⓘ **Connect to group:** Enter group name to search 🔍

Name	Email	Remove
Antonne Paddock	apaddock@inscapepublishing.com	✕
Elena Ali	eali@inscapepublishing.com	✕

Cancel   **Add learners** **7**

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

① Select Learners   ② **Unlock content**   ③ Email options   ④ Summary

Current EPIC credits: 260
Spending credits: 14
Remaining credits: 246

Unlock content

RECOMMENDED

Worksmart

○

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:**

Giving constructive feedback

Managing conflict

Empowering your team

Helping your team navigate change

Motiv⑧ur team

Add-ons

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APPLICATION ADD-ONS (ENGLISH ONLY)   **LANGUAGE ADD-ONS**

☐ Management +10 credits per user ⓘ   ☑ Danish +7 credits per user

☐ Agile EQ +10 credits per user ⓘ

‹ Back   [Cancel]   [**Unlock content**] ⑨

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

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

Email options

Scheduling

Send invitation email: ● Now   07/17/2025 📅   03:27 PM ⊙
                          ○ On selected date

Send reminder email: ● Never   📅   ⊙
                          ○ If not completed by

Customize invitation email

Email template language
Danish ▾

Add a custom message
Note: custom message will not be translated.

Enter your custom message

0/2000

‹ Back   Cancel   **Send assessments**   🔴10

11. Click **Confirm transaction**.

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

Current EPIC credits: *75*
Spending credits: *14*
Remaining credits: *61*

Summary

⚠ 2 learners already have access to some of the selected content. You won't be charged for duplicates. **SHOW DUPLICATES** ✕

Learners   EDIT ✎

Total: 2
Connected groups: —

Content   EDIT ✎

Product ^	Learners	Credits
Danish language pack	2	14
Workplace	0	0

Email options   EDIT ✎

Send invitation email: 07/17/25 at 03:28 pm
Send reminder email: Never
Email template language: English
Custom message: —

‹ Back   Cancel   **Confirm transaction** ⑪

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 **Unlock Worksmart** to unlock Worksmart content for the learner.
6. Select application or language add-ons and click **Unlock Add-ons**.

LEARNER INFO   ASSESSMENT INFO **4**

History

DOWNLOAD PROFILE REPORT

ASSESSMENT COMPLETED

Unlocked Catalyst Content   ⌄

Unlock product content

Recommended

🔒 Worksmart   +20 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.

⌄ VIEW MORE

Unlock Worksmart **5**

🔒 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)   LANGUAGE ADD-ONS

☑ Management +10 credits per user   ☑ Danish +7 credits per user

☑ Agile EQ +10 credits per user

Unlock Add-ons **6**

Update Learners

Name and Email

Administrators can update a learner from the list if the learner has _not completed their assessment_.

7. From the _Organizations_ page, click the organization name.
8. Enter the learner's name or email to search for their record.
9. Click the learner's name from the list.
10. Edit the name or email address.
11. Click **Update learner**.

LEARNER INFO   ASSESSMENT INFO

Learner information   ☐ Archive learner

First Name
Ahmad

Last Name
Babbage

4

Email
ababbage@noemail.com

Assigned department and groups

Department

Groups
2 groups ✕

‹ 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?

Not right now   Send 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**.

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
- ❖ If their DiSC style was revealed
- ❖ 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** accordion arrow to see a list of associated activities.

LEARNER INFO   ASSESSMENT INFO **3**

History   DOWNLOAD PROFILE REPORT
ASSESSMENT COMPLETED

Unlocked Catalyst Content   ^   **4**

Workplace
- **04/02/2020** Completed Workplace assessment

Agile EQ
- **09/10/2020** Unlocked AgileEQ product

Management
- **12/08/2021** Unlocked Management content

Unlock product content

Recommended

🔒 **Worksmart**   +20 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.

⌄ VIEW MORE

Unlock Worksmart

🔒 **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) LANGUAGE ADD-ONS

☑ Management +10 credits per user   ☑ Danish +7 credits per user

☑ Agile EQ +10 credits per user

Unlock Add-ons

‹ Back

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**.

5. Click **Continue**.

6.   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?

‹ Back   Cancel   Archive   **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**.

6. Click **Continue**.

7. Click **Activate**.

Reactivate learners

Reactivating these learners will make them visible to other colleagues in your Catalyst organization. Do you wish to reactivate these learners?

If needed, you will want to re-assign these learners to their department and/or groups.

‹ Back   Cancel   Activate   **7**

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

13. Click **Activate**.

Reactivate learners

Reactivating these learners will make them visible to other colleagues in your Catalyst organization. Do you wish to reactivate these learners?

If needed, you will want to re-assign these learners to their department and/or groups.

‹ Back   Cancel   Activate **13**

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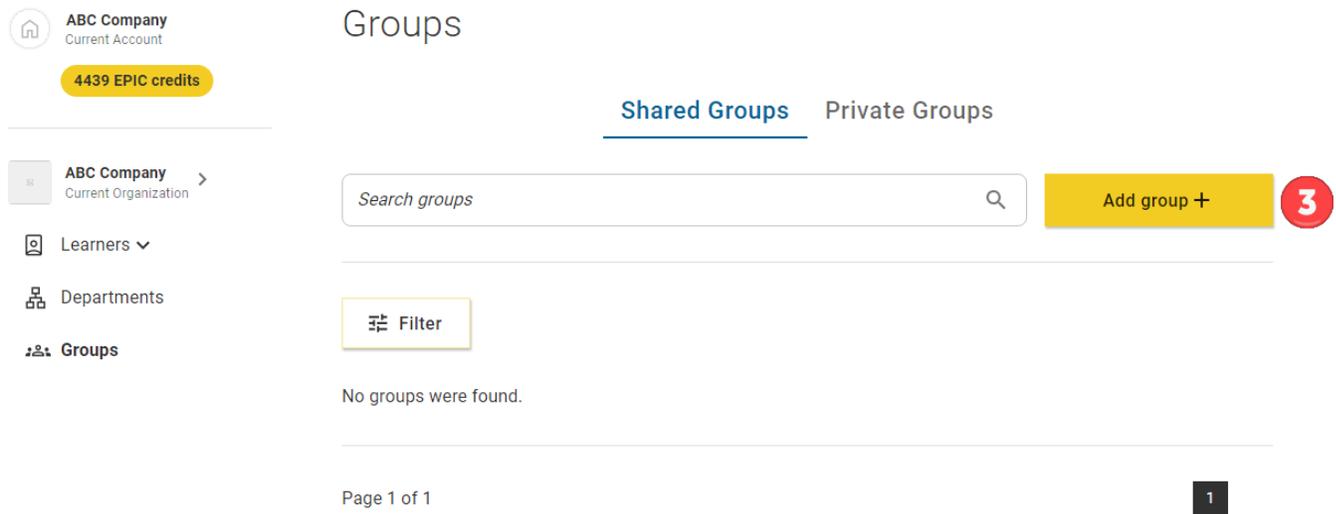
4. Enter the group name.
5. Select the group type.
6. Select the visibility option for individual group members. You can change this setting at any time.
7. Select whether to include yourself in the group.
8. Click **Add group**. The next step is to add group members to the group.
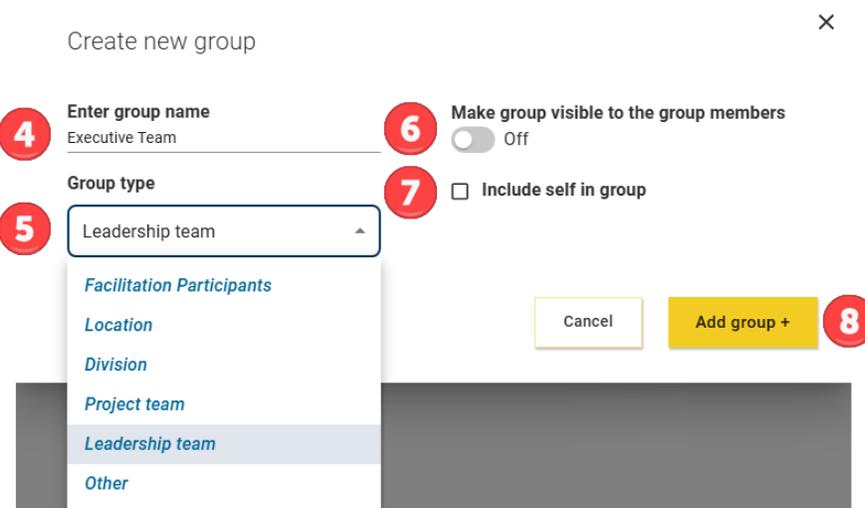
Manage Group Members

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 Group Members 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 ✗

| Name | Email | Department | Select
(Unselect all) |

There are no learners here

Cancel ③ Add learners to August 2024 Workplace

4. Click **Okay**.

Bulk Import Group Members

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.**

October 20 Training

Delete   Edit

Facilitation Participants

Search learners within this group   🔍   + Add   ⬆ Import   **1**

Download ▾

First name   Last name ▲   Email   Style   Remove

This group is empty.

Page 1 of 1

0/500 learners in this group

2. Click **Download template**.

Import learners to group

2   ⬇ Download template

You can import up to 500 learners at a time using an Excel or CSV file. Please ensure the file is formatted correctly.

CSV

Drag & drop files or browse

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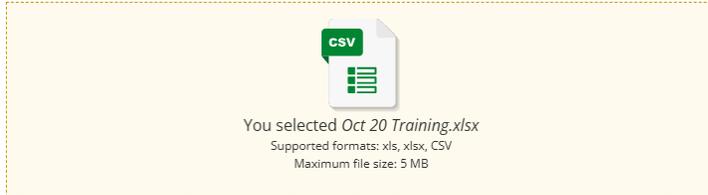
Cancel   Import

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 **Import** to add the learners to the group.

Import learners to group

⤓ Download template

You can import up to 500 learners at a time using an Excel or CSV file. Please ensure the file is formatted correctly.

You selected *Oct 20 Training.xlsx*
Supported formats: xls, xlsx, CSV
Maximum file size: 5 MB

Cancel   Import   **5**

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

October 20 Training   Delete   Edit **7**

[Facilitation Participants]

GROUP INFO   GROUP INSIGHTS

✓ All 15 learners imported successfully.   ✕

| Search learners within this group   🔍 | + Add | ⬆ Import |

Download ▾

First name	Last name ▲	Email	Style	Remove
Rahim	Abadi	rabadi@inscapepublishing.com	C	✕
Elena	Ali	eali@inscapepublishing.com	iS	✕
Stephanie	Choi	schoi@inscapepublishing.com	D	✕
Sara ⌖	Dalton	sdalton@noemail.com	C	✕ **6**
Marge	Davies	jdavies@inscapepublishing.com	DC	✕
Lucas	de Lugo	ldelugo@inscapepublishing.com	CD	✕

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 that has 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

(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

   (4) ···

Ida Exuberance   Matas Patton   Sheridan Murphy

✏ Edit
(5) 🗑 Delete

Page 1 of 1   1