EVERYTHING DiSC A Wiley Brand | Catalyst

Catalyst Administrator Experience

Managing organizations, learners, departments, and groups

Contents

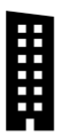
Overview

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; changes made in Catalyst are visible in EPIC, and vice versa.

Accounts in Catalyst refer to EPIC primary and sub accounts where credits are stored. 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 client's company might only have access to one organization. A 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

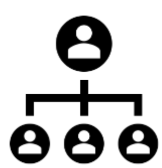
Users in Catalyst can have the administrator and/or the learner role. The role determines activities the user can perform. Administrators manage access to an organization's Catalyst data, and a learner consumes the interactive Catalyst learning content. A user can be an administrator in multiple organizations, 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 identify 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. This content is divided into Workplace, Management, and Agile EQ. All learners receive Workplace content. Management and Agile EQ content can be unlocked for a learner upon creation or added at any time later. The Catalyst content is unlocked for learners using credits from the associated EPIC account.

Workplace* — Build Better Relationships

Management* — Inspire Great Managers

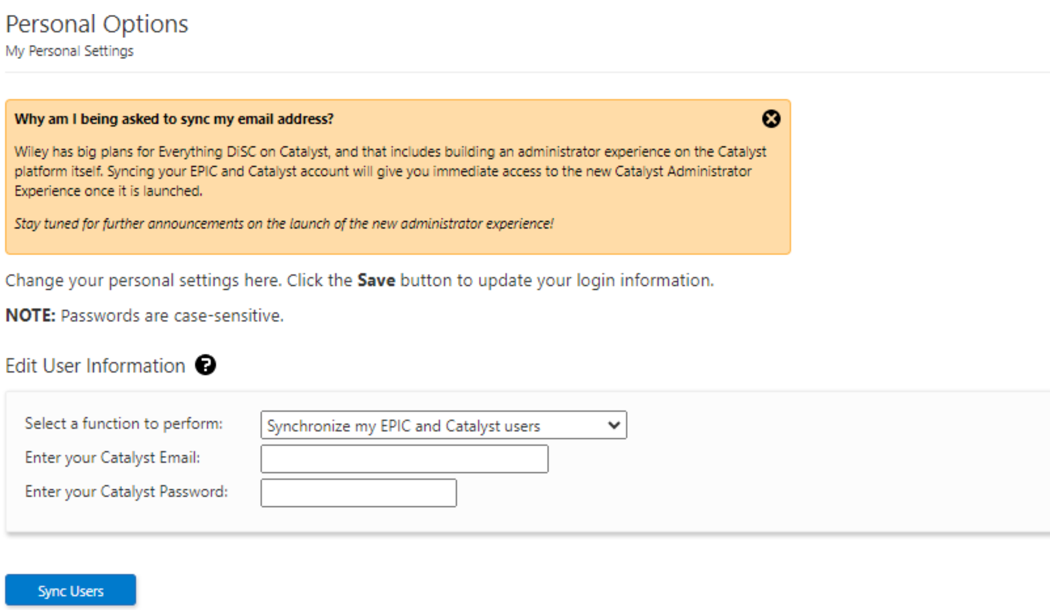
Agile EQ* — Increase Workforce Agility

Getting Started

User Synchronization

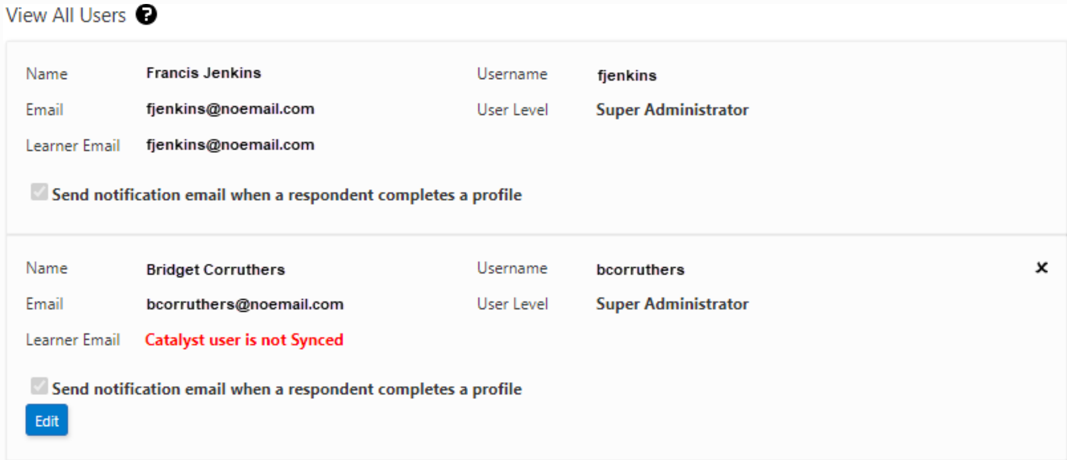
To gain access to the Catalyst administrator experience, you must have a Catalyst learner account and an EPIC administrator account. Then you must synchronize your EPIC administrator and Catalyst learner accounts. This synchronization – or user mapping – allows you to access organizations, departments, 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**.
5. Click **Sync Users**.



6. Perform steps 1-5 for each of your EPIC users. All EPIC users can be synchronized with the same Catalyst user.

You can review which administrators in your EPIC account have synchronized their users from the *Manage Your Account* > *Manage Users* page. If an email address appears in the *Learner Email* field, then the user's accounts are synchronized. "Catalyst user is not Synced" appears in the field if the accounts have not been linked.



Login

Catalyst learners and administrators log into Catalyst the same way.

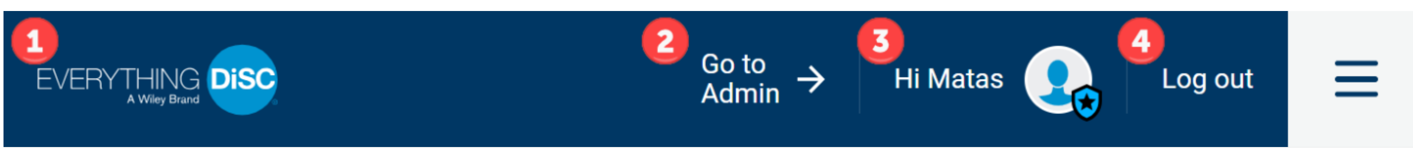
1. Navigate to **catalyst.everythingdisc.com**.
2. Enter your email address and click **Continue**.
3. Enter your password.
4. Click **Sign in**.

Common Components

Header

The persistent Catalyst header allows users to:

1. Return to the *Home* page by clicking the logo,
2. Toggle in between the administrator and learner experiences by clicking the *Go to…* link,
3. Access the user account settings, and
4. Logout.



Note the avatar's blue badge denotes the user is an administrator.

Footer

Find copyright and support information along with links to legal documents in the administrator footer.

Account Settings

The *Account Settings* page is the same for learners and administrators. It allows users to modify their name, department, photo, login credentials, and privacy settings.

1. Click **Hi [Name]** in the header to open your Catalyst user's account information.
2. The **Your information** tab allows you to update your photo, name, and department.
3. Click the **Login/password** tab to update your email or password.
4. Click the **Privacy/communication** tab to stop sharing your DiSC information with your colleagues or to update your communication preferences.
5. Click **Save**.

Navigation

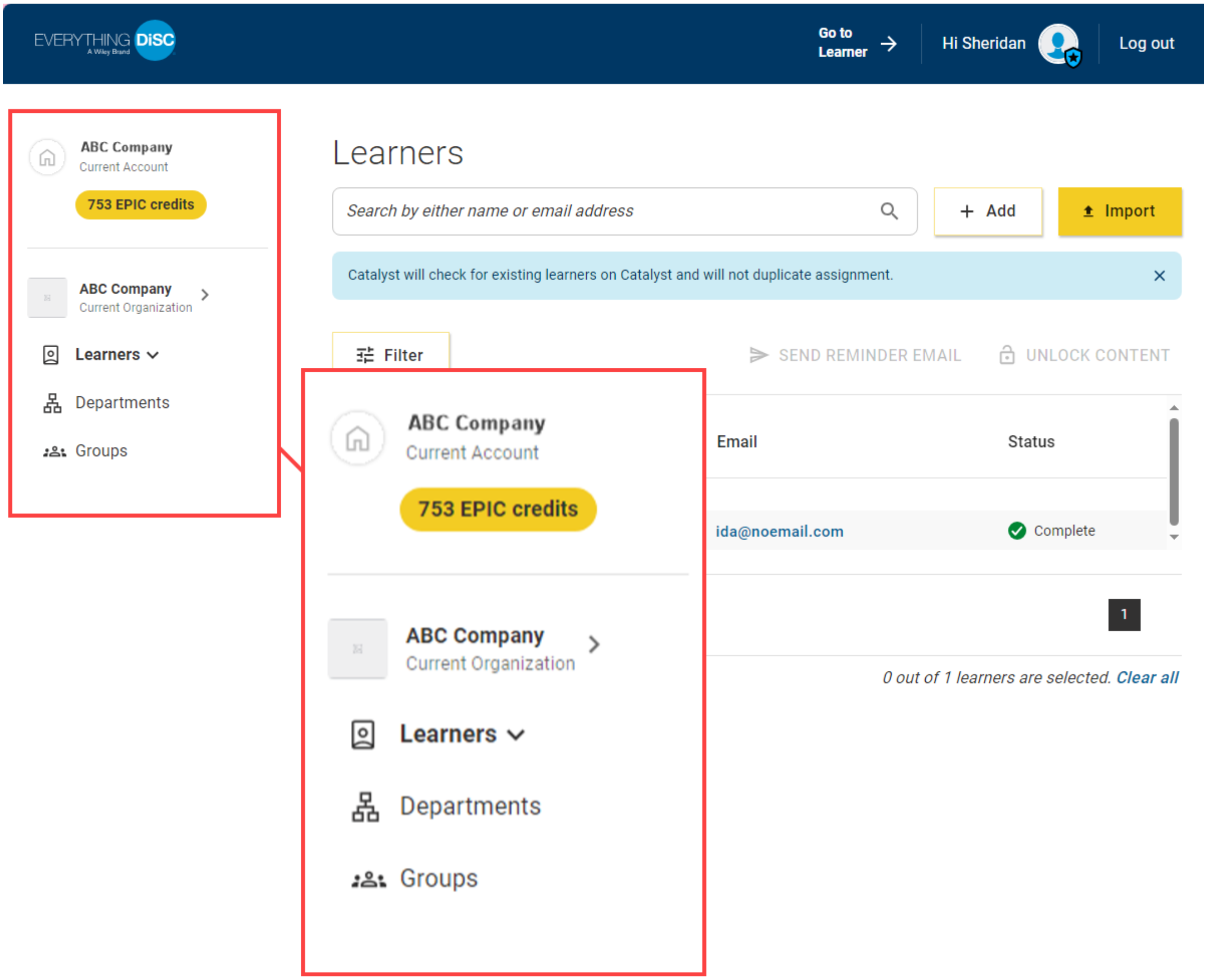
Header Link

Clicking **Go to Admin** in the header takes learners to their administrator home page.

When working as an administrator, clicking **Go to Learner** returns the administrator to their learner home page.

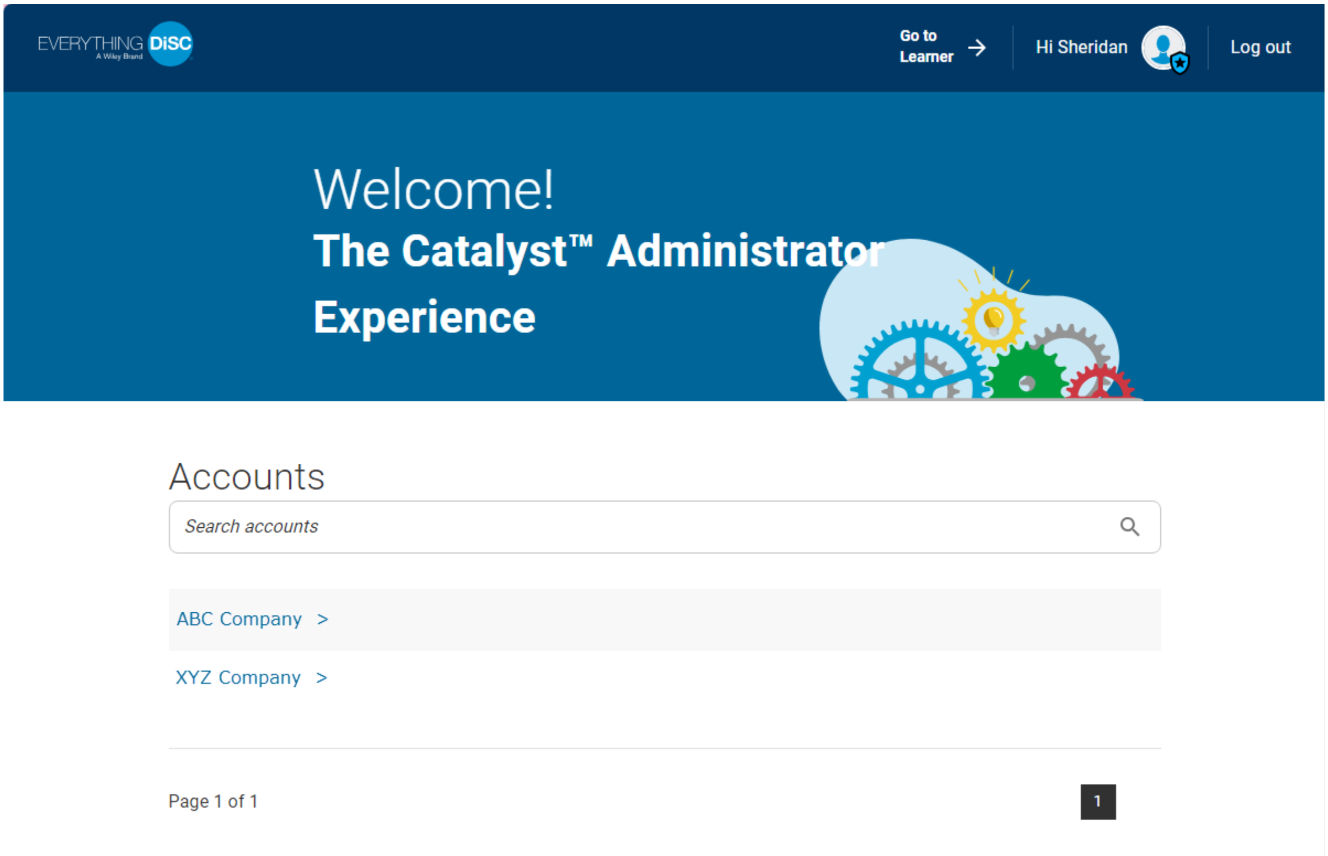
Sidebar

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   see the *Accounts* page.

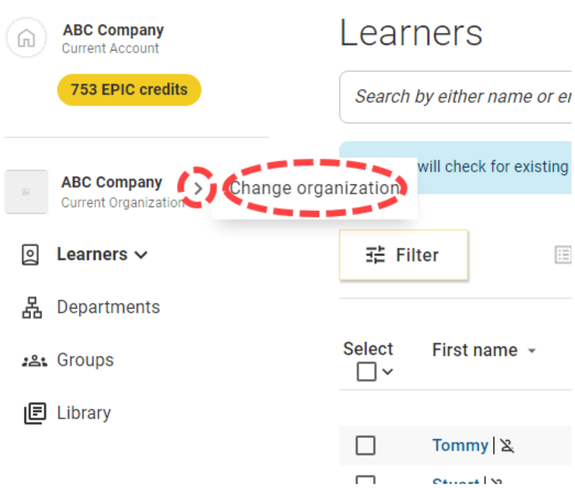


Organizations

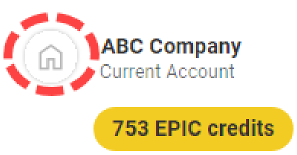
Before you can work with a department, learner, or group, you first must select an organization from the *Organizations* page. This page displays the different organizations associated with your Account; any organizations created on this page will also appear in EPIC and vice versa.

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 Organizations.

If after selecting an organization you decide you need to switch to another organization in the same Account, you can hover over the **>** 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.

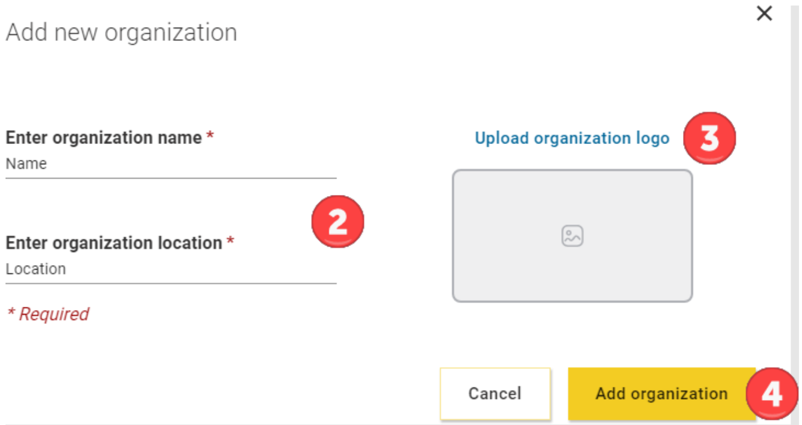


Create Organizations

If the organization you need to work with does not appear on the *Organizations* page, then you must create it.

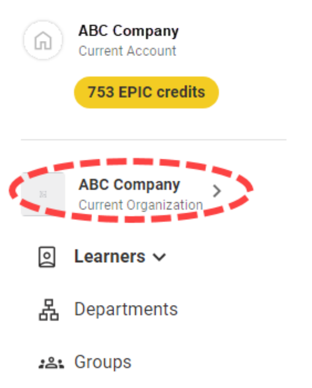
1. From the *Organizations* page, click **Add Organization +**.

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**.

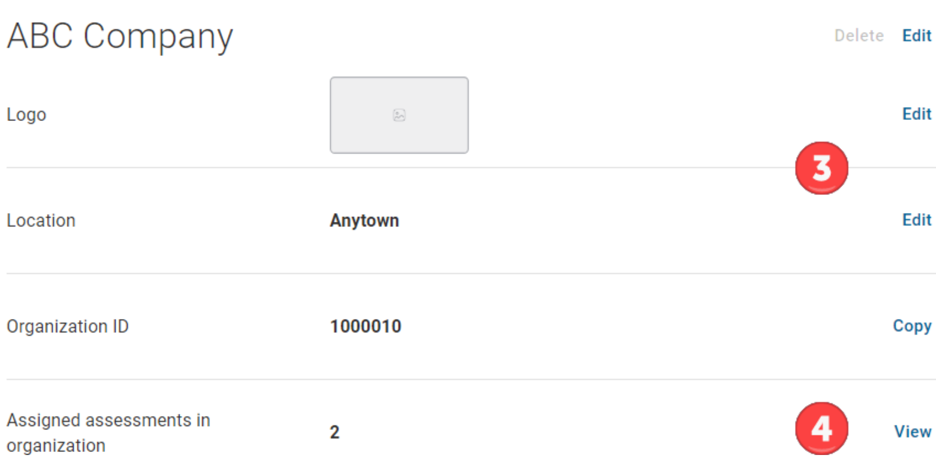


Update Organizations

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



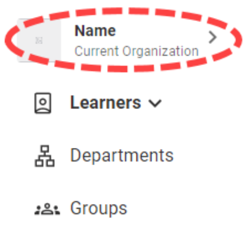
3. Click the corresponding **Edit** link to update the name, logo, or location.
4. Click the corresponding **View** link to see a list of learners who have completed an assigned assessment.



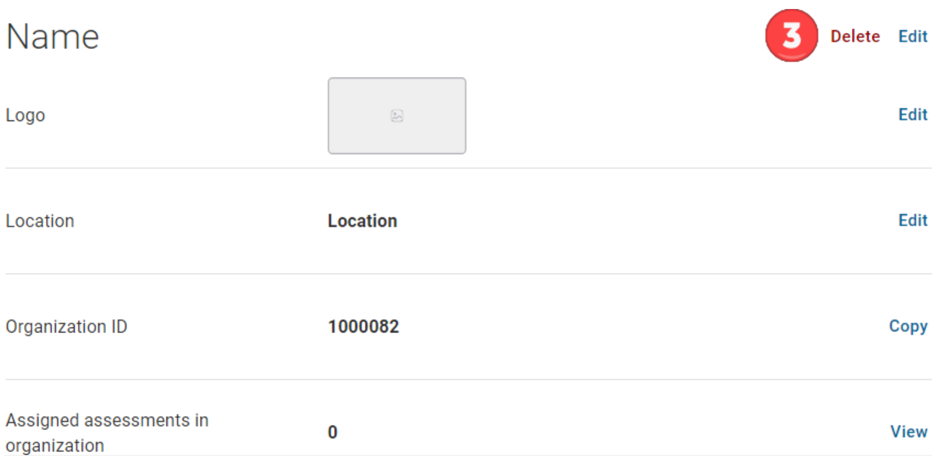
Delete Organizations

Organizations can only be deleted if they do not have learners.

1. From the *Organizations* page, click the organization name.
2. Click the Organization name from the sidebar.



3. Click **Delete organization**.

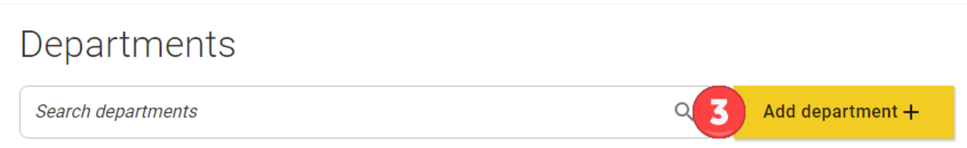


Departments

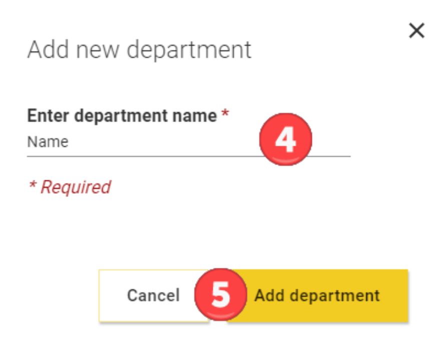
Learners organize themselves into departments, but administrators can create, edit, and delete departments in addition to viewing and managing the learners in each.

Create Departments

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

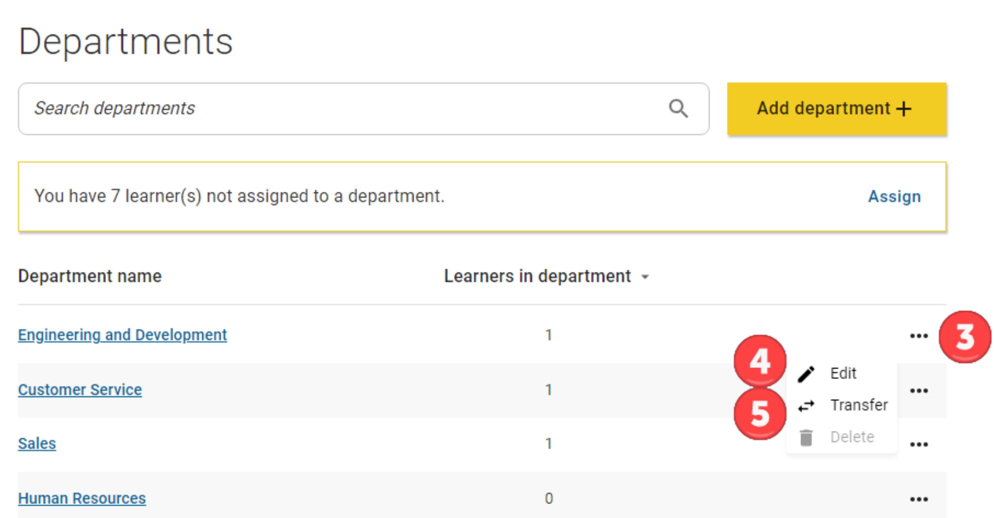


4. Enter the department name.
5. Click **Add department**.



View & Update Departments

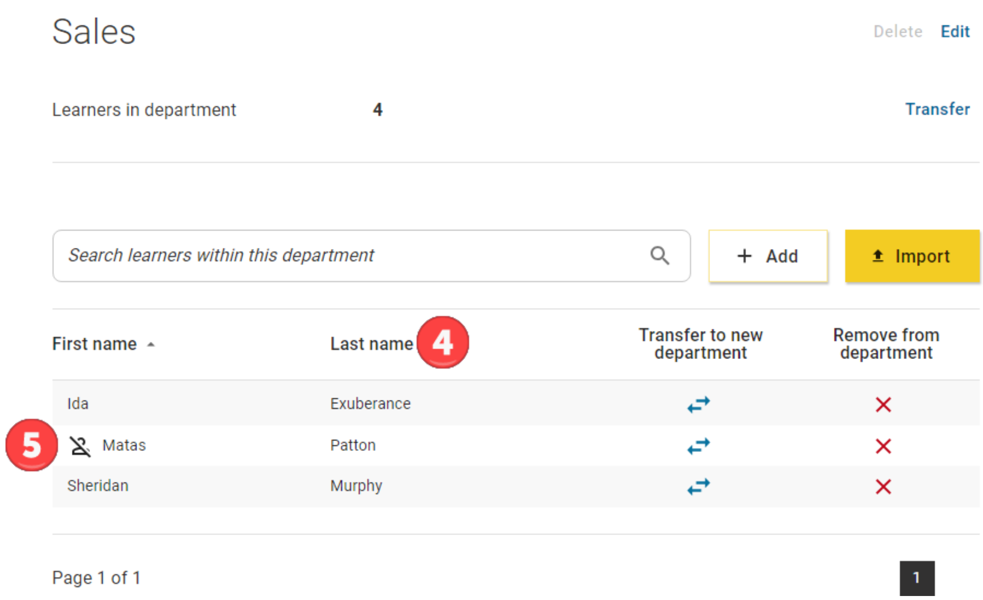
1. From the *Organizations* page, click the organization name.
2. Click **Departments** from the sidebar.
3. Click the meatball menu to the right of the department.
4. Click **Edit** to change the department name.
5. Click **Transfer entire department** to move all the associated learners to a new department.



Manage Learners

View Learners in a Department

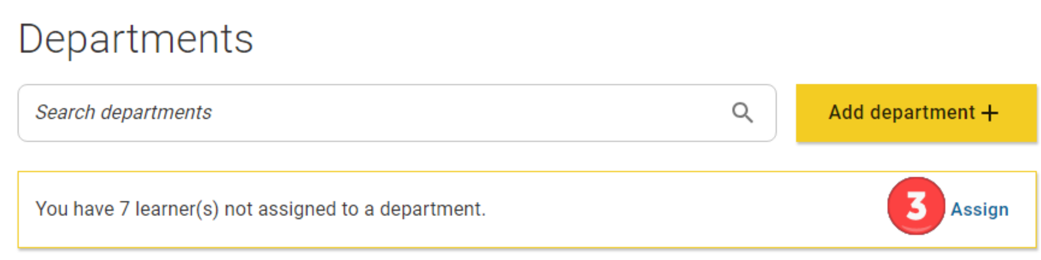
1. From the *Organizations* page, click the organization name.
2. Click **Departments** from the sidebar.
3. Click the department name from the list. The learners are alphabetically displayed by first name.
4. To sort by last name, click the **Last name** column header.
5. Learners that are not sharing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



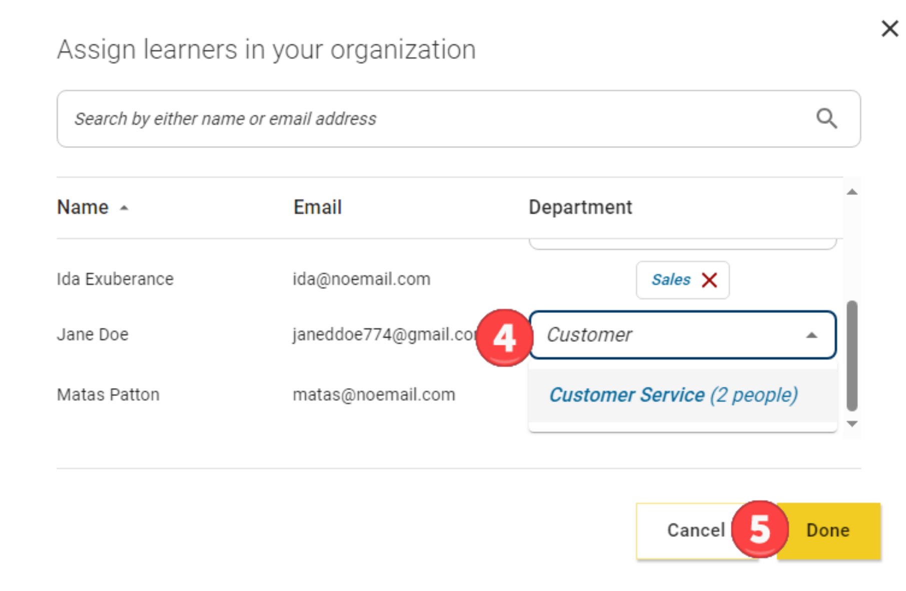
Add Learners to a Department

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.



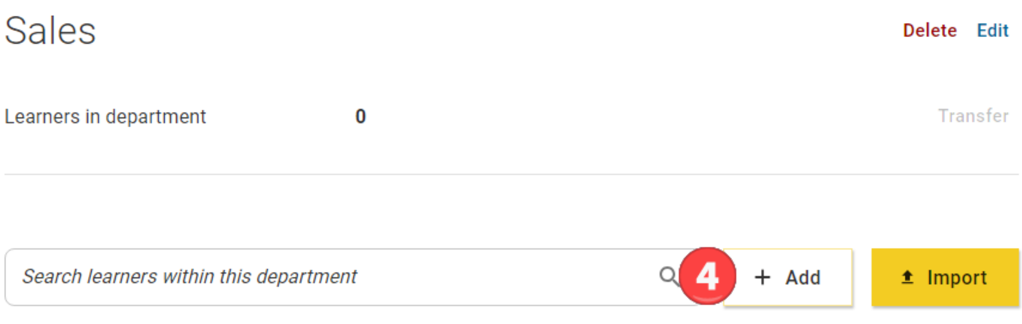
4. Enter and select the department name for each learner.



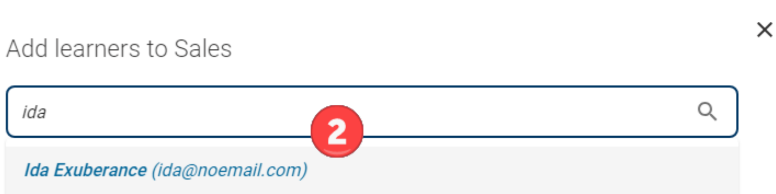
5. Click **Done**.

Individually from the Department

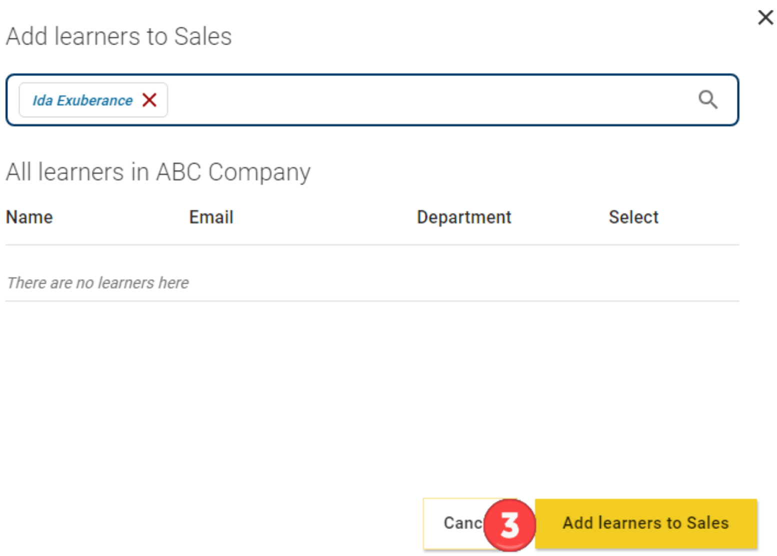
1. From the *Organizations* page, click the organization name.
2. Click **Departments** from the sidebar.
3. Click the department name from the list.
4. Click **+ Add**.



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



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

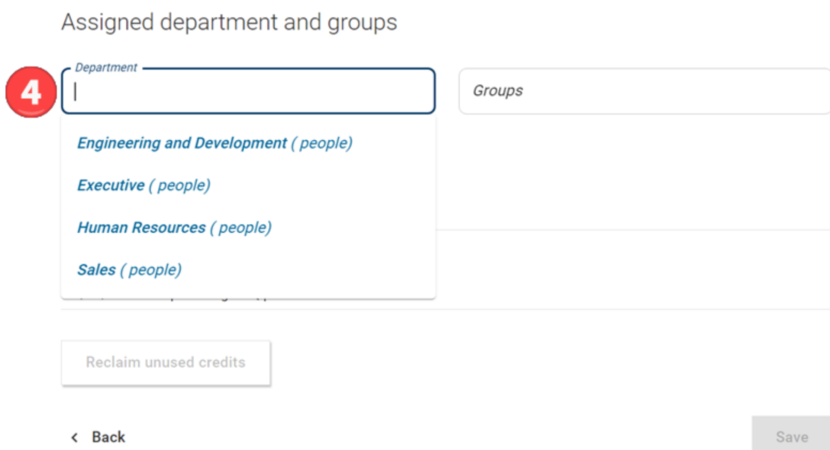


7. Click **Confirm**.
8. Click **Okay**.

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.



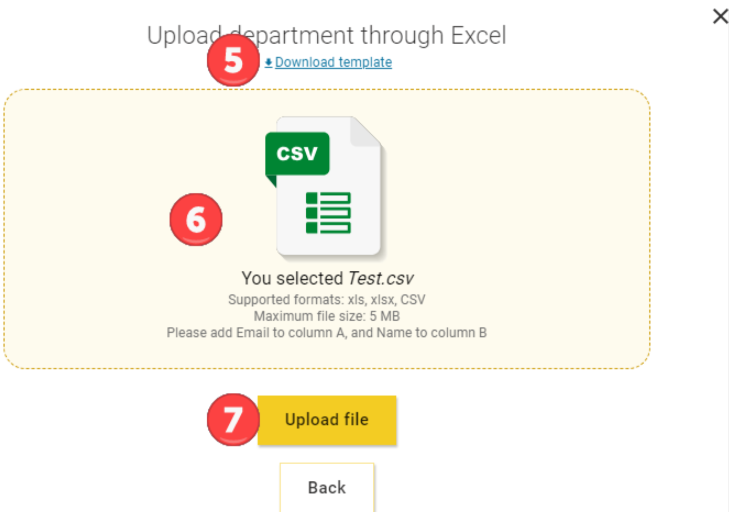
5. Click **Save**.

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**.

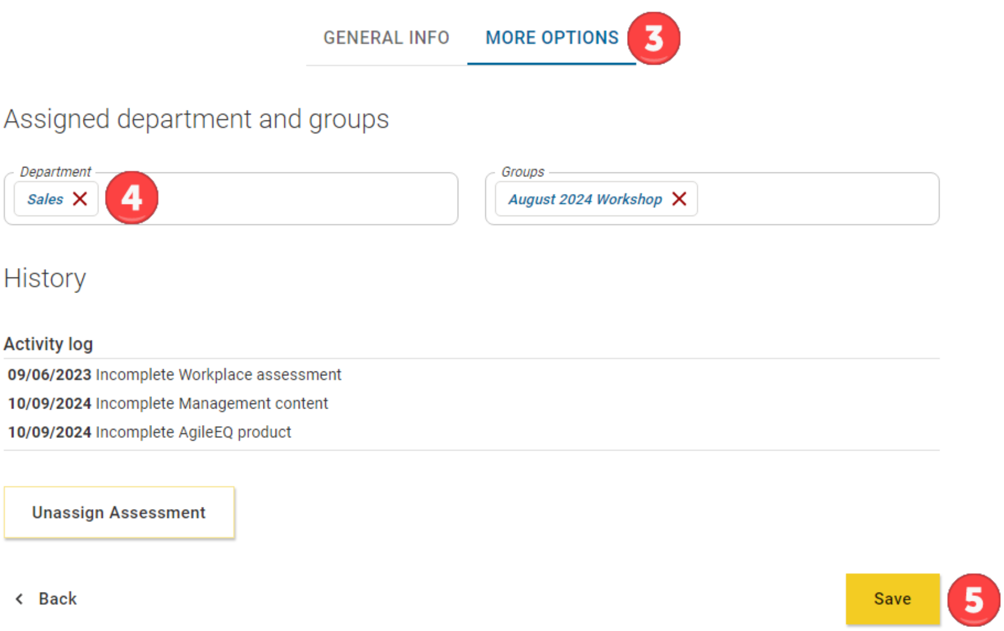
5. Click **Download template** to download an Excel template.
6. Drag and drop or browse to find the completed Excel file.
7. Click **Upload file**.



Remove Learners from a Department

From the Learner

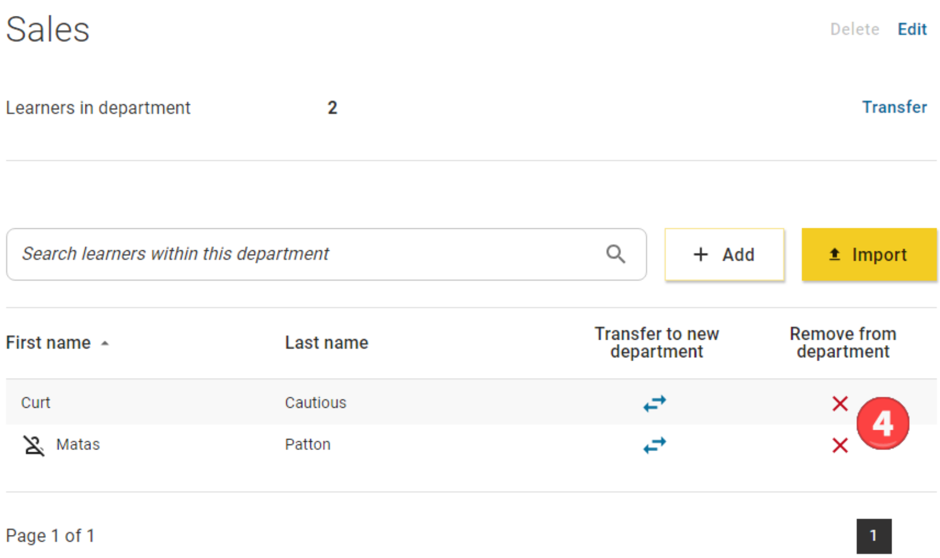
1. From the *Organizations* page, click the organization name.
2. Click the learner's name.
3. Click **More Options**.
4. Click the **X** to remove the department.
5. Click **Save**.



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.



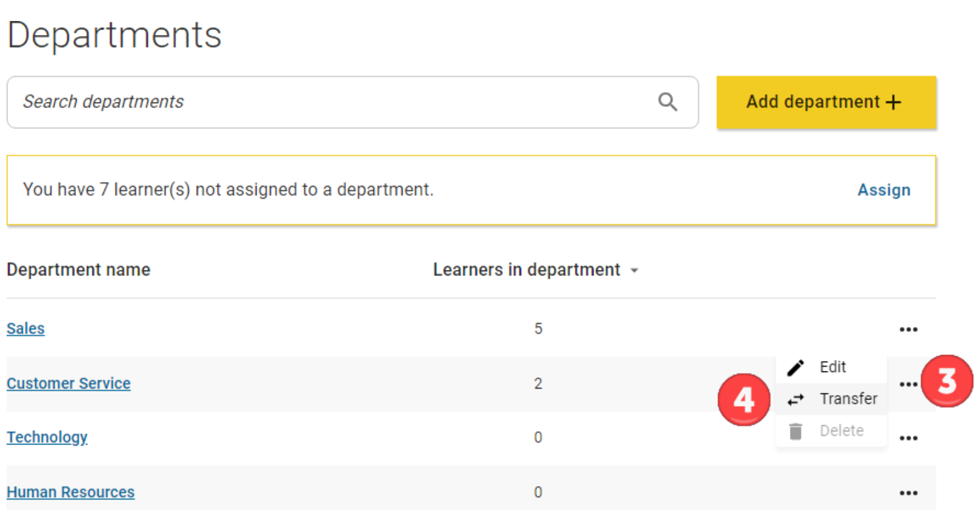
5. Click **Remove** to confirm.

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 deleted.

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**.

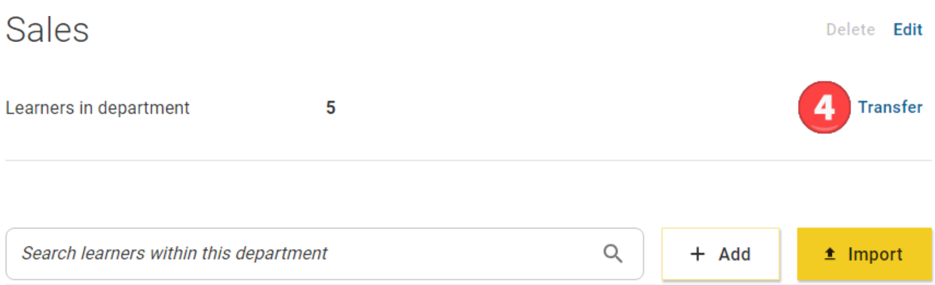


5. Select a department.
6. Click **Transfer entire department**.

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 deleted.

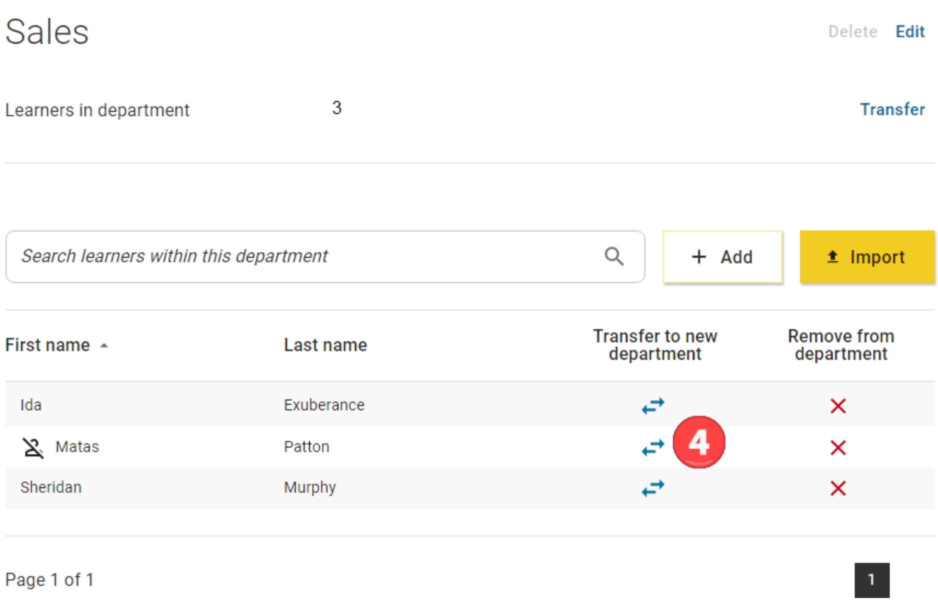
1. From the *Organizations* page, click the organization name.
2. Click **Departments** from the sidebar.
3. Click the department name from the list.
4. Click **Transfer**.



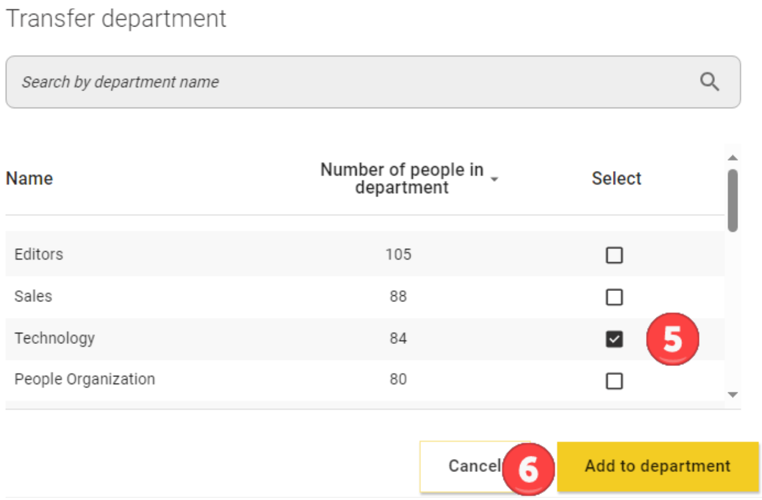
5. Select a department.
6. Click **Transfer entire department**.

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**.

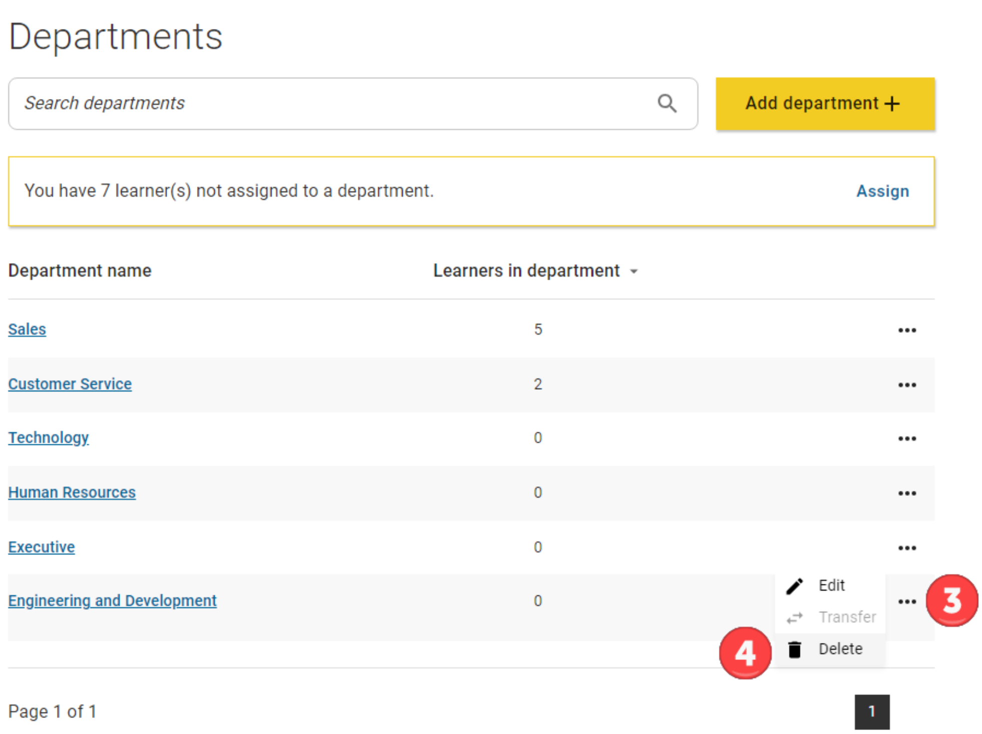


7. Click **Transfer** to confirm.

Delete Departments

Departments can only be deleted if they do not have learners. You must first transfer learners from a department to delete 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**.



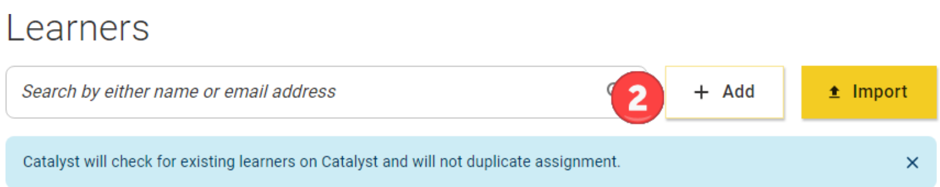
Learners

Assign Catalyst to New Learners

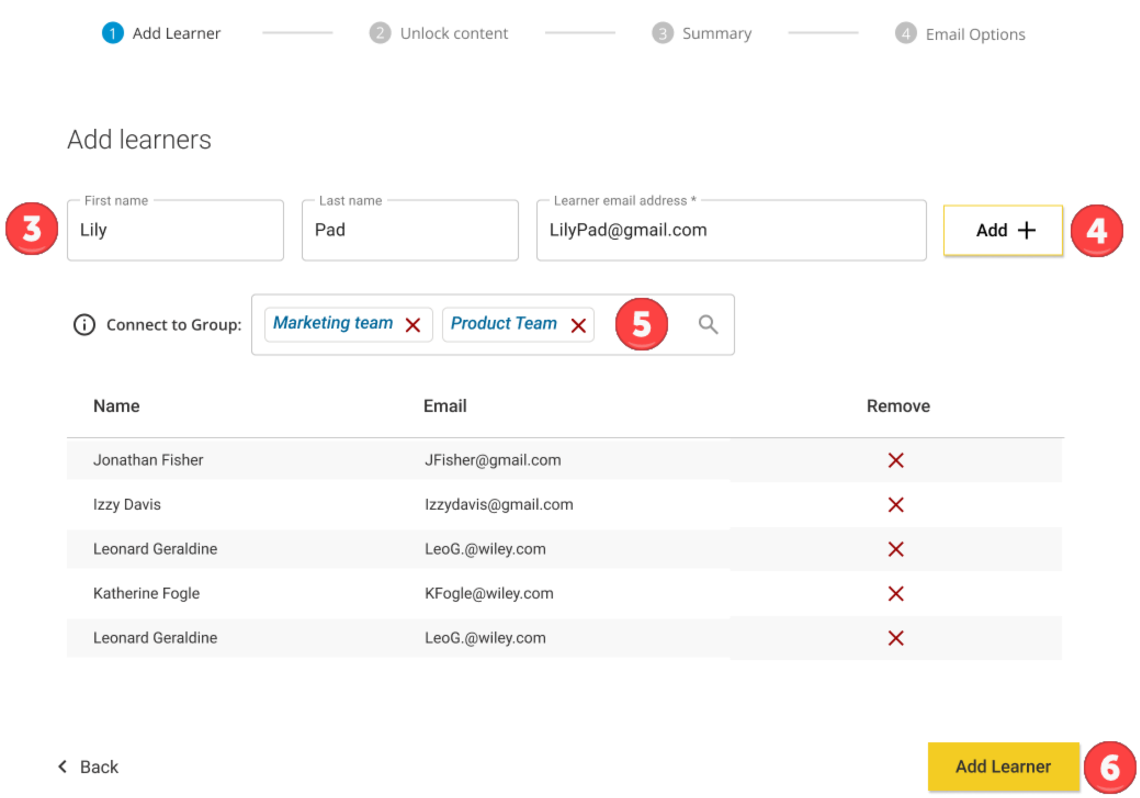
Administrators can create Catalyst learners by entering their information one learner at a time or in bulk by uploading a comma-delimited file. The only required information is each learner's name and email address. All available content can be assigned when the learner is created, or applications like Management and Agile EQ can be unlocked later. After the learner is created, an email inviting the learner to complete an Everything DiSC assessment.

One-by-One

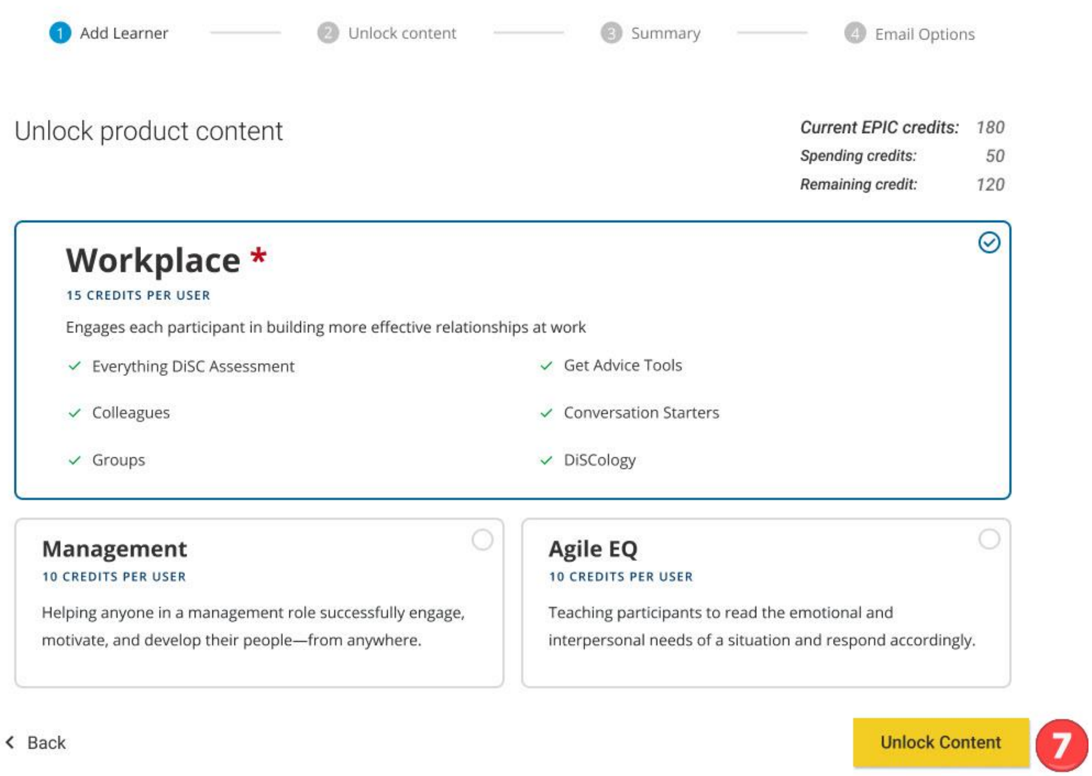
1. From the *Organizations* page, click the organization name.
2. Click **+ Add** from the *Learners* page.



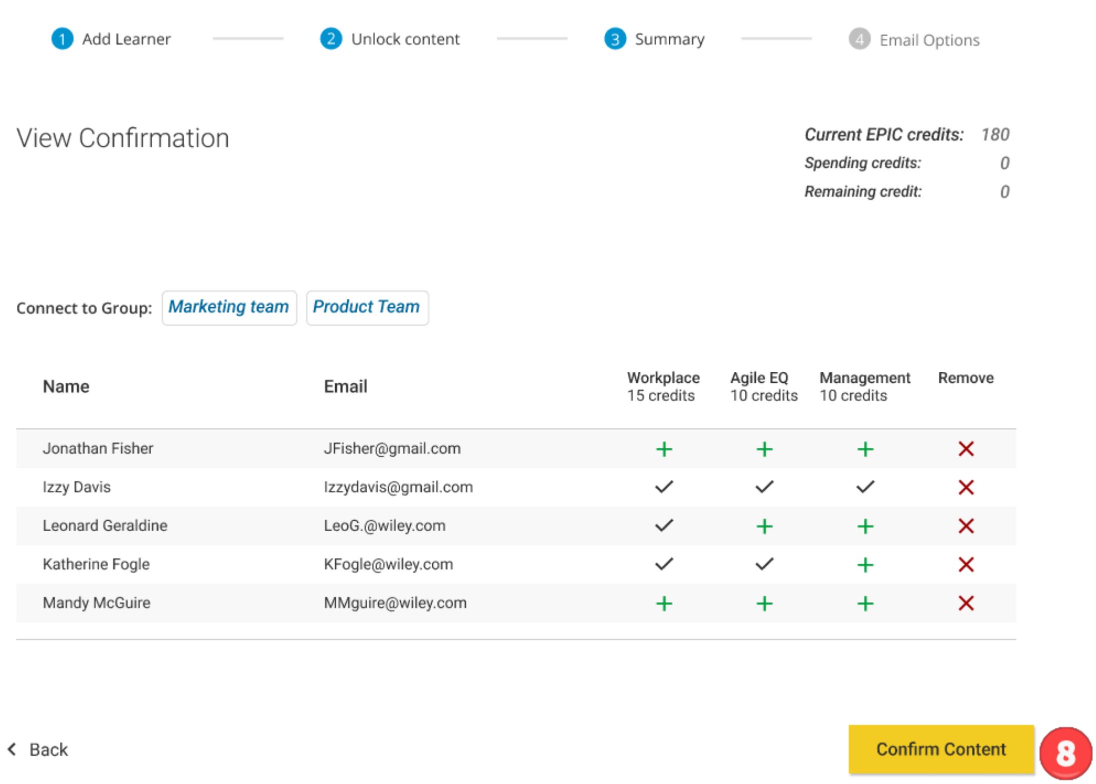
3. Enter the learner's name and email address. These fields are required.
4. Click **Add+**. Repeat steps 3 and 4 until all the Learners you want to create appear.
5. Click in the **Connect to Group** field to select one or more existing groups or create a new group to which you want to add the learner(s). This field is optional; learners do not have to be added to groups. However, organizing learners by groups may help you find them later.
6. Click **Add Learner**.



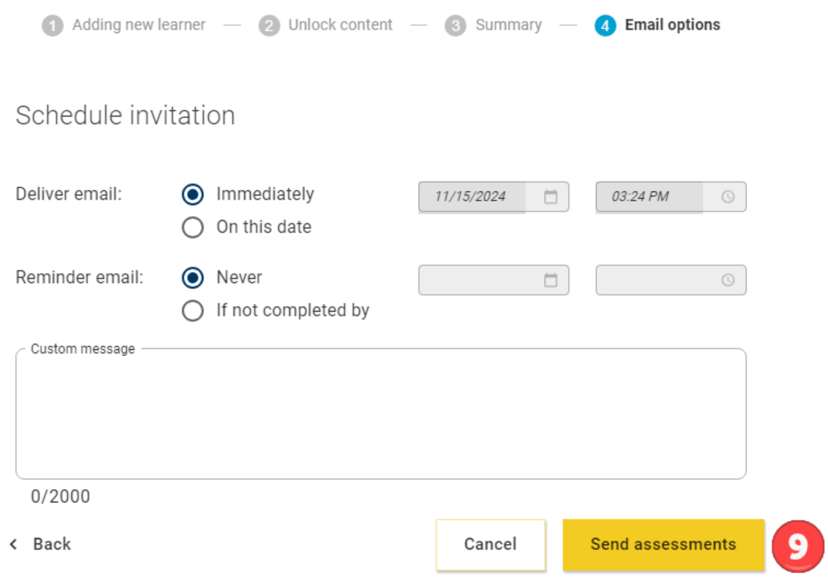
7. Select the content to unlock and click **Unlock Content**.



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



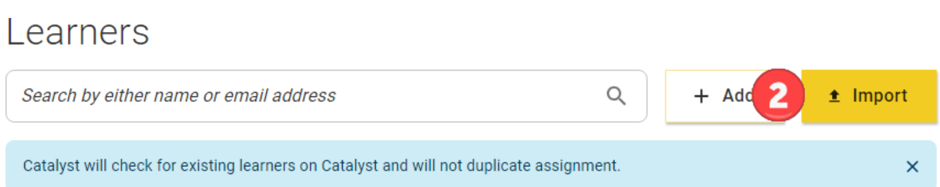
9. Edit email settings and click **Send assessments**.



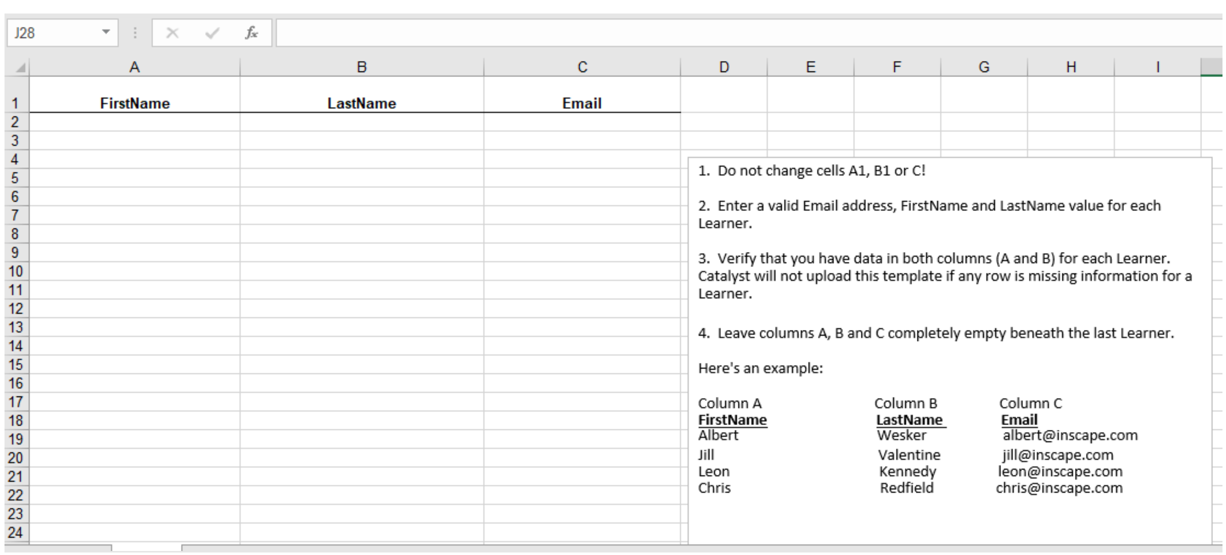
Bulk Import

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.

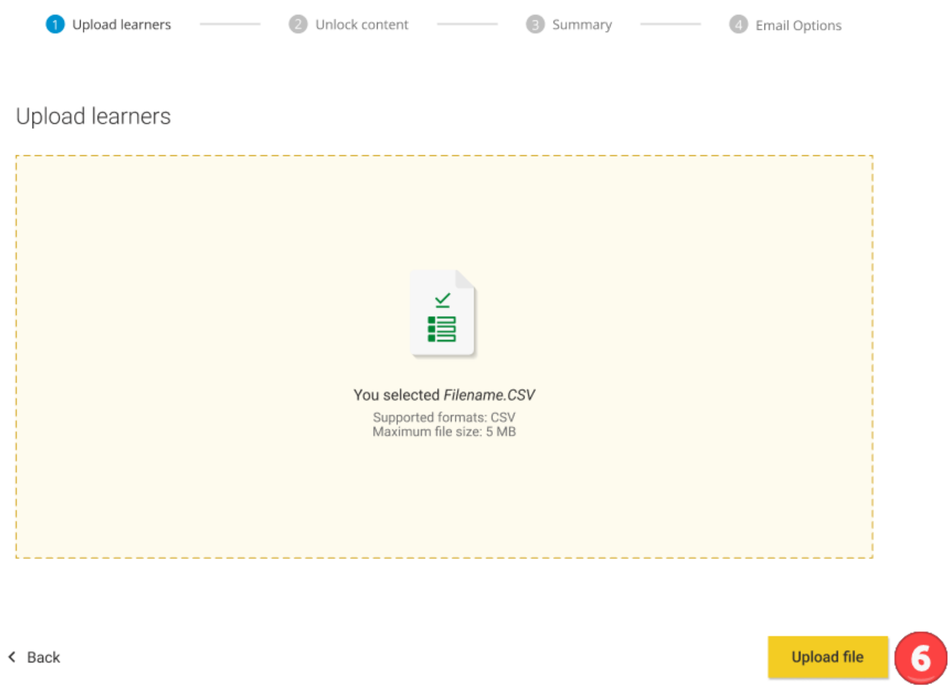
1. From the *Organizations* page, click the organization name.
2. Click **Import**.



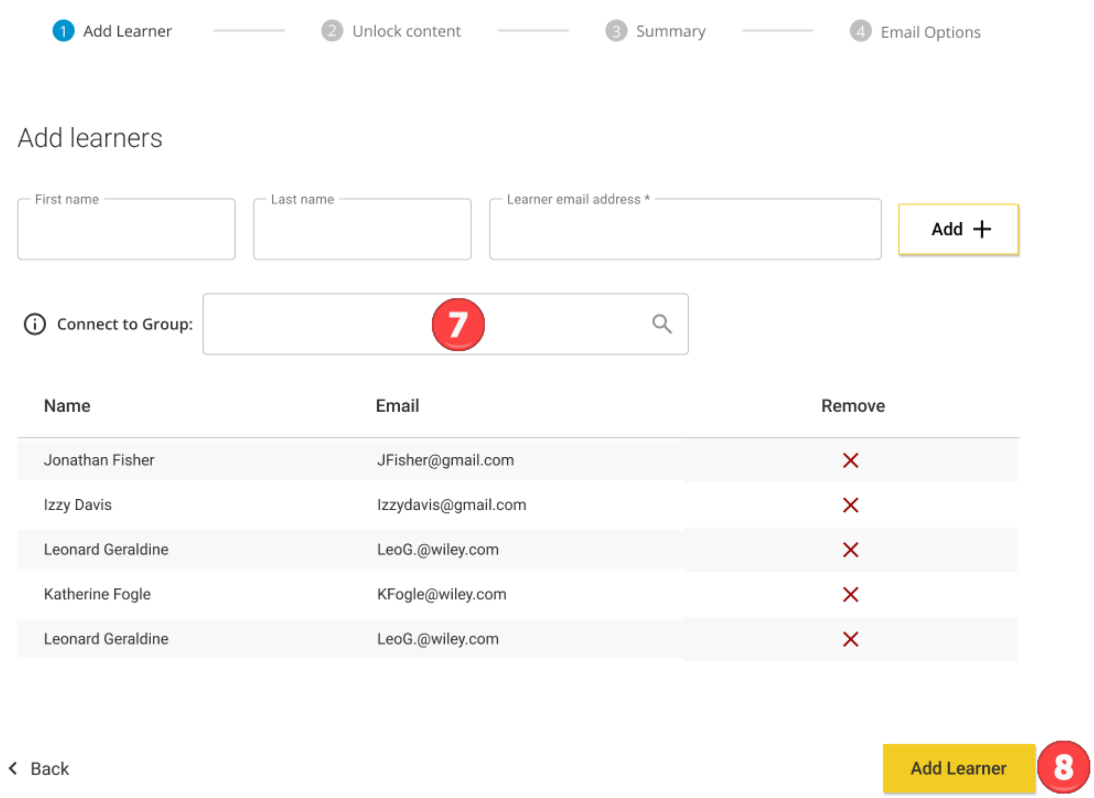
3. Click **Download template**.
4. Enter the names and email addresses of the learners.



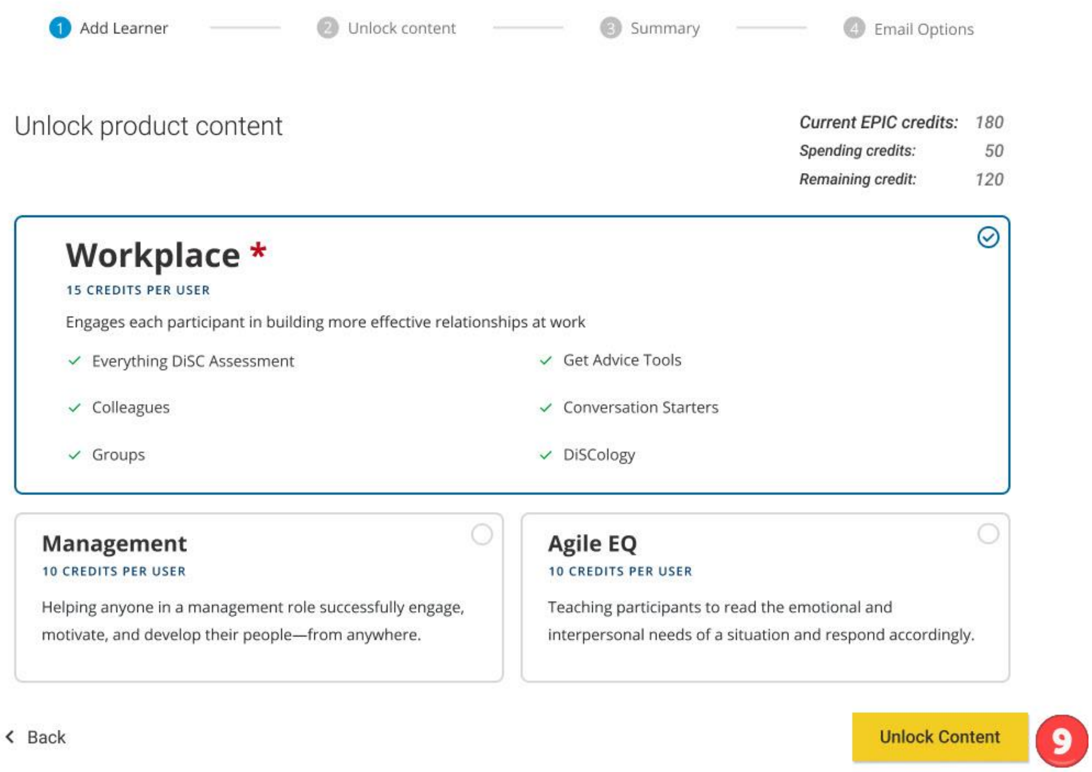
5. Drag and drop the file you created or click **Browse** to find the file.
6. Click **Upload file**.



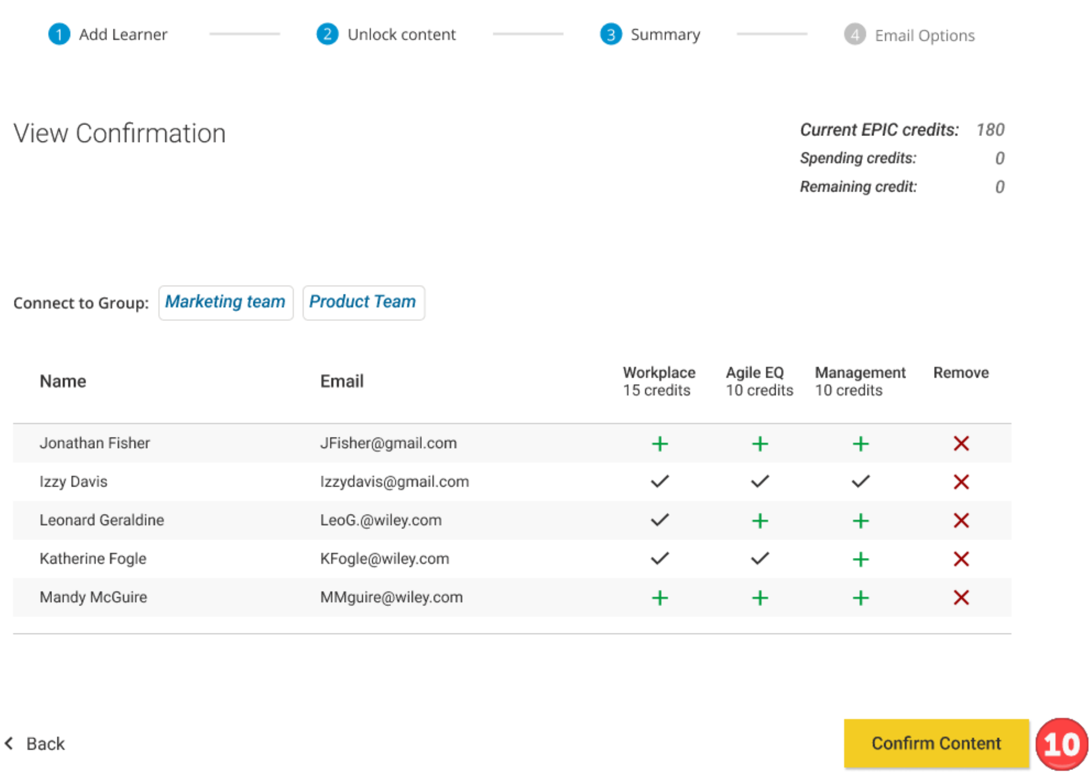
7. Optionally, add the learners to a group.
8. Click **Add Learner**.



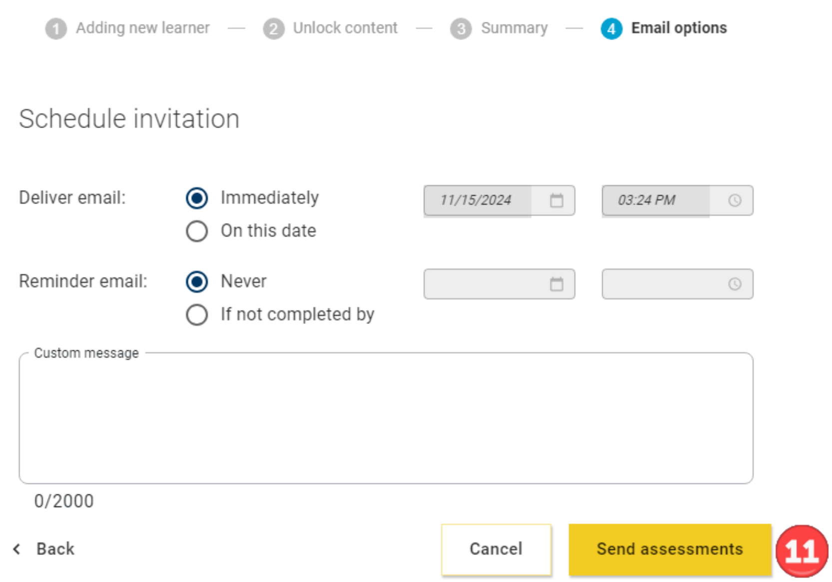
9. Select the content to unlock and click **Unlock Content**



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



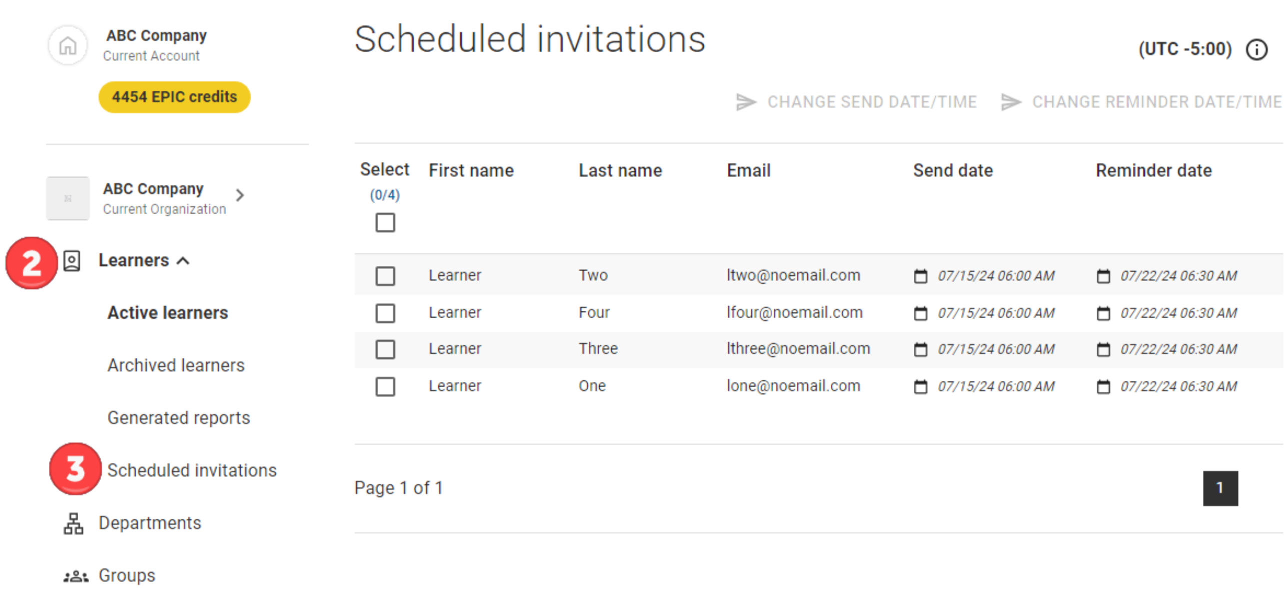
11. Edit email settings and click **Send assessments**.



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.

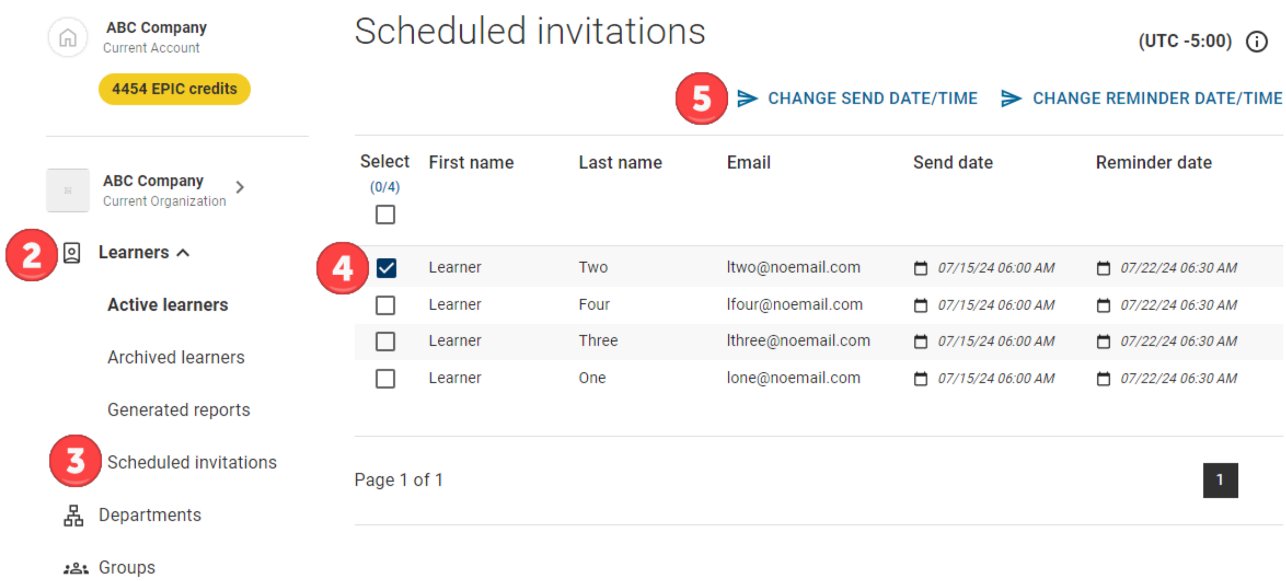
1. From the *Organizations* page, click the organization name.
2. Click **Learners** from the sidebar.
3. Click **Scheduled invitations**.



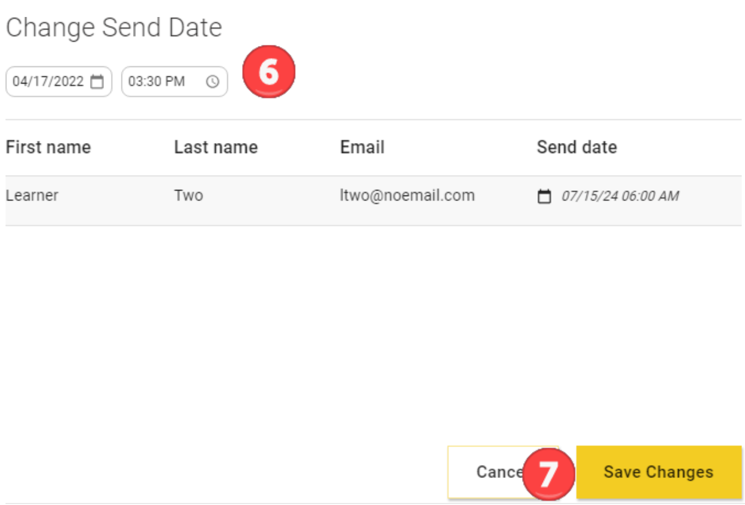
Change Invitation Send Date/Time

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**.

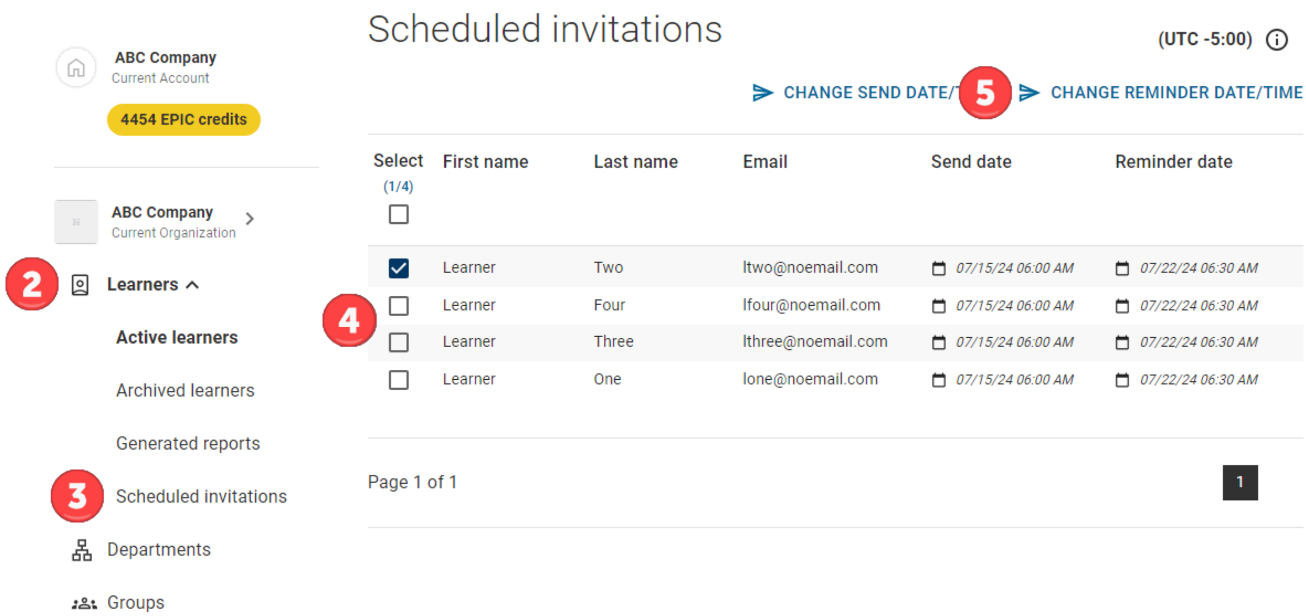


6. Edit the date and/or time.
7. Click **Save Changes**.

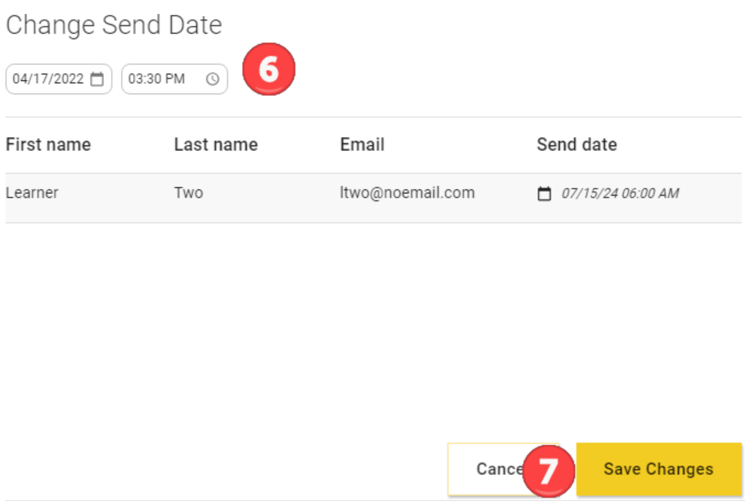


Change Reminder Send Date/Time

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**.



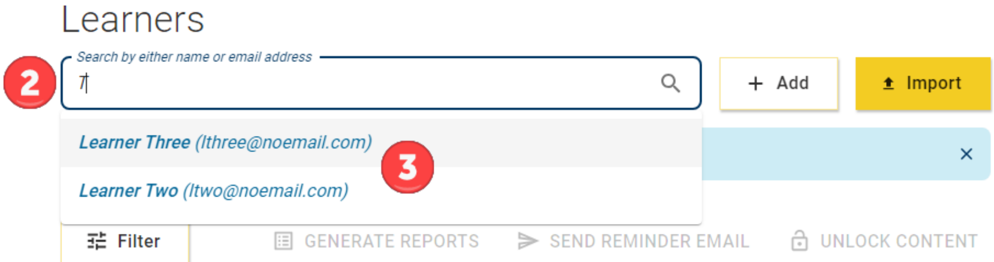
6. Edit the date and/or time.
7. Click **Save Changes**.



Search for Learners & Filter Search Results

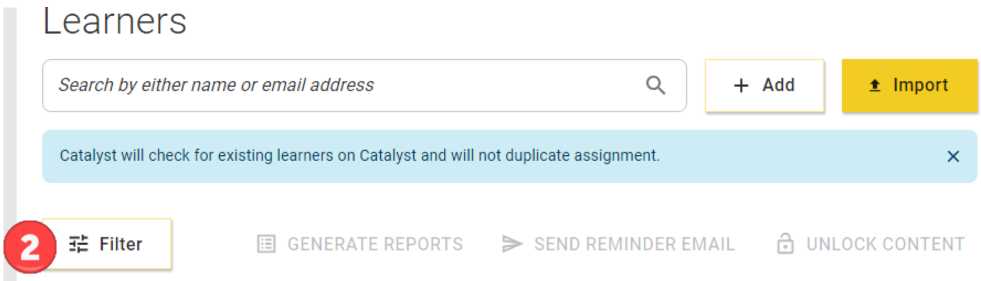
Administrators can search for learners by name or email address.

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.

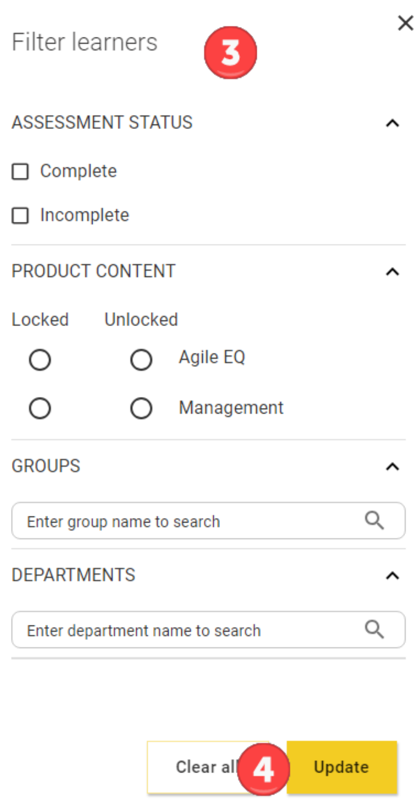


But you can also filter your learners by assessment status, product content, groups, and departments.

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



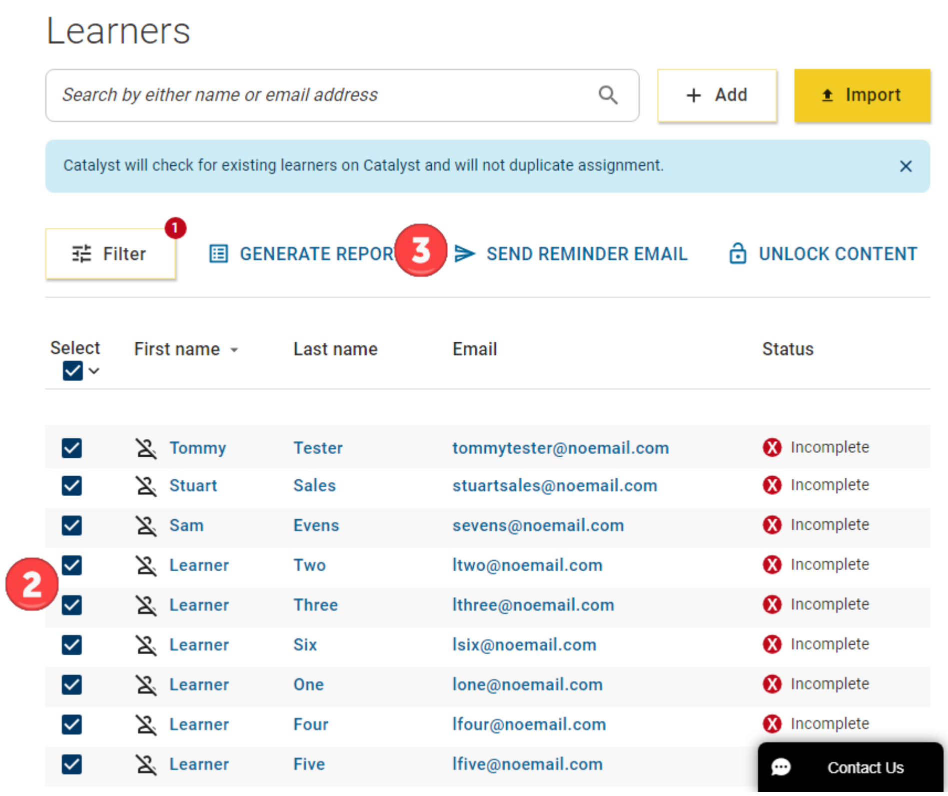
3. Select filters:
    a. Assessment Status – Complete or incomplete
    b. Product Content – Agile EQ and Management, Locked and Unlocked
    c. Groups – Search by group name
    d. Departments – Search by department name
4. Click **Update**.



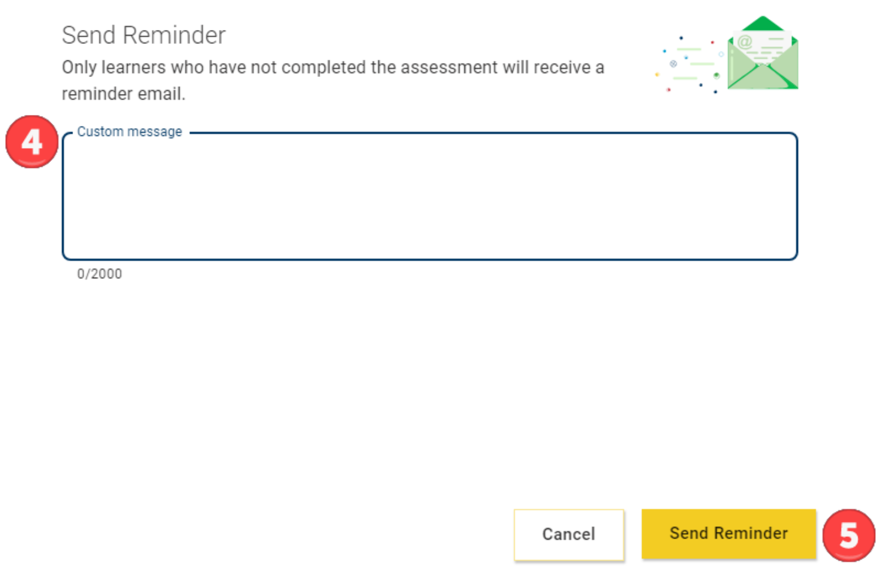
Send Ad Hoc Reminders to Learners

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**.

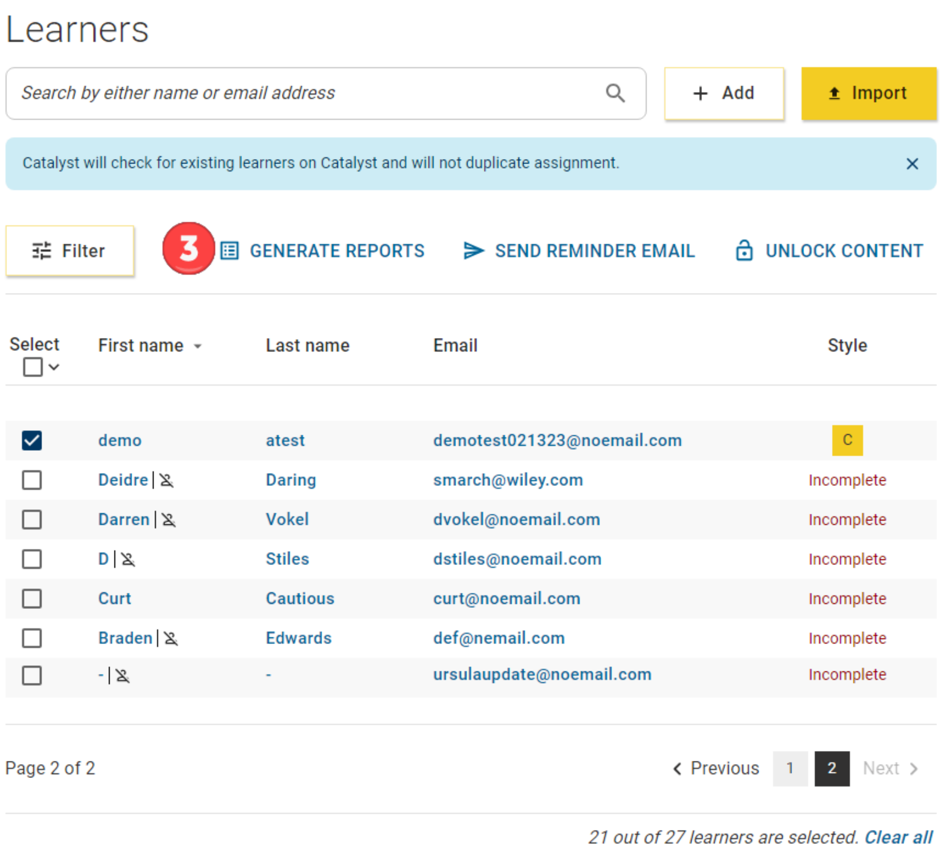


Generate Reports

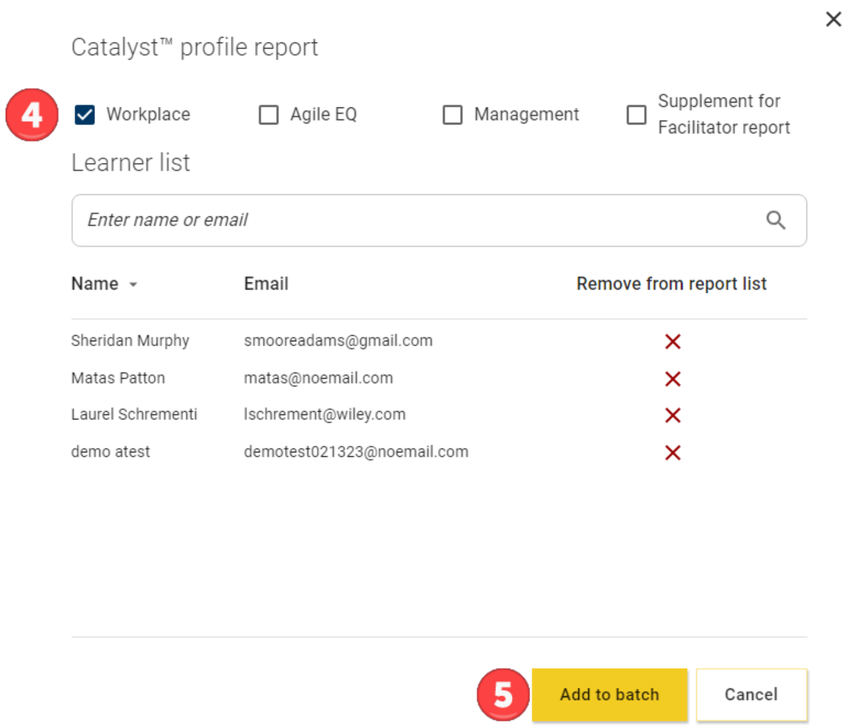
Administrators can generate reports for any learner with a completed assessment. Reports can be generated from the main Learners page or from individual Learner records. Note, the Supplement for Facilitator Report can only be generated in batch for multiple learners.

Multiple Learners

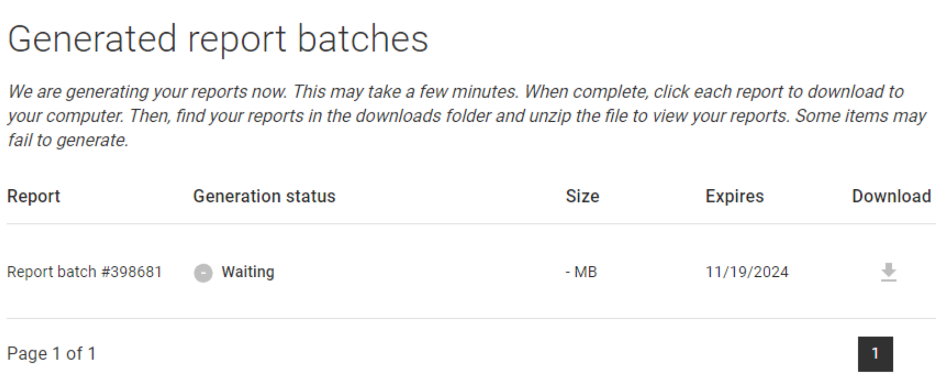
1. From the *Organizations* page, click the organization name.
2. Search and select learners with incomplete assessments.
3. Click **GENERATE REPORTS**.



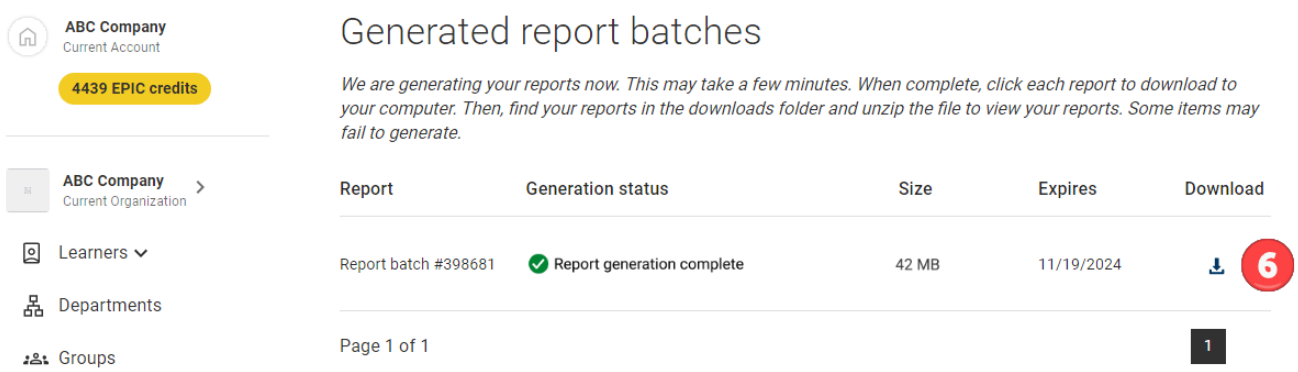
4. Select the content. Note, the Supplement for Facilitator Report can only be generated through this batch method.
5. Click **Add to batch**.



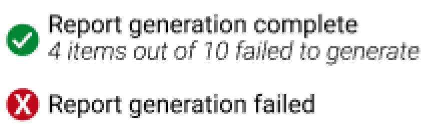
The Generated Reports page opens. It may take a few minutes to generate multiple reports.



6. 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.

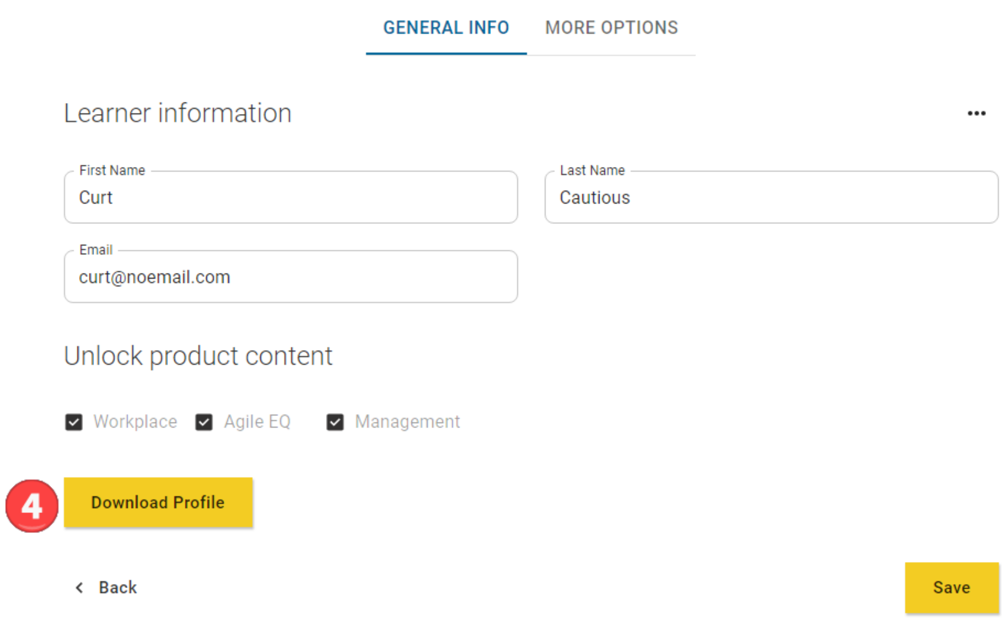


Note, the *Generation status* column will also show if there were issues generating any reports.



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 **Download Profile**. The file will automatically download to your computer.



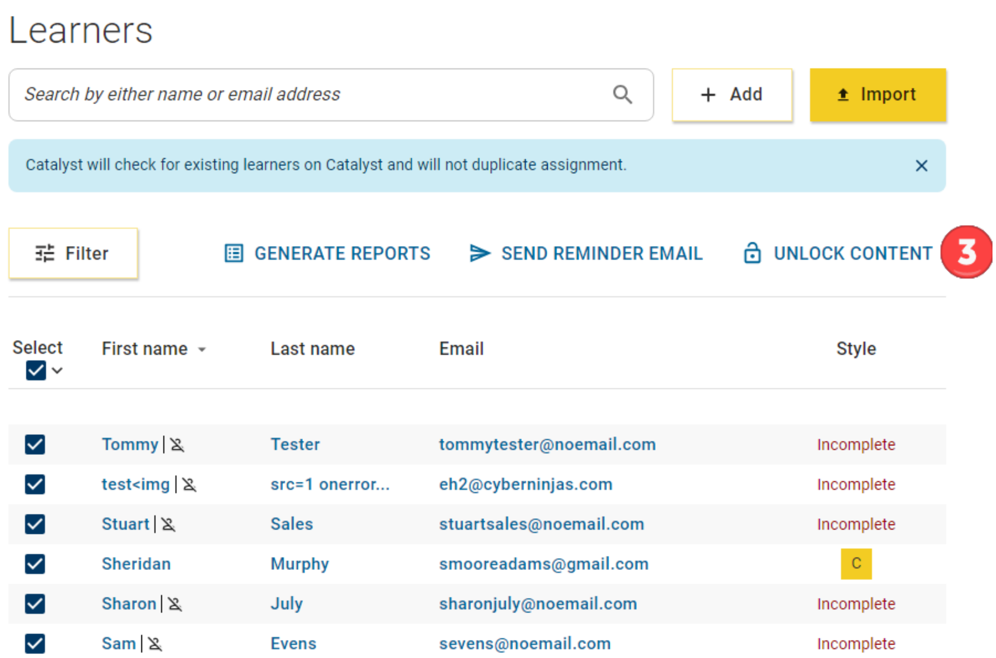
Unlock Additional Content for Existing Learners

Multiple Learners

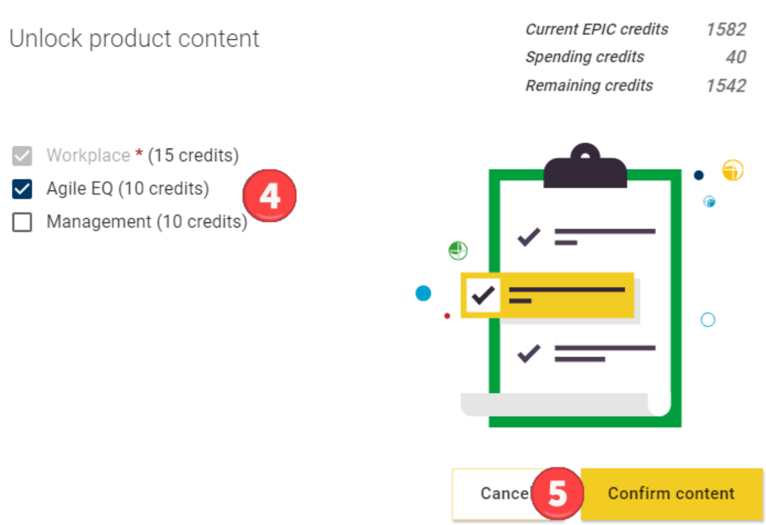
Manual Method

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

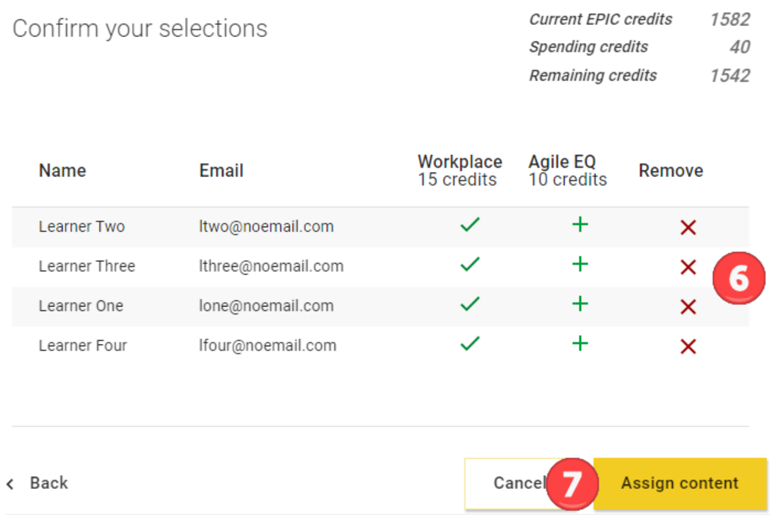
1. From the *Organizations* page, click the organization name.
2. Search for and select the learners.
3. Click **UNLOCK CONTENT**.



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

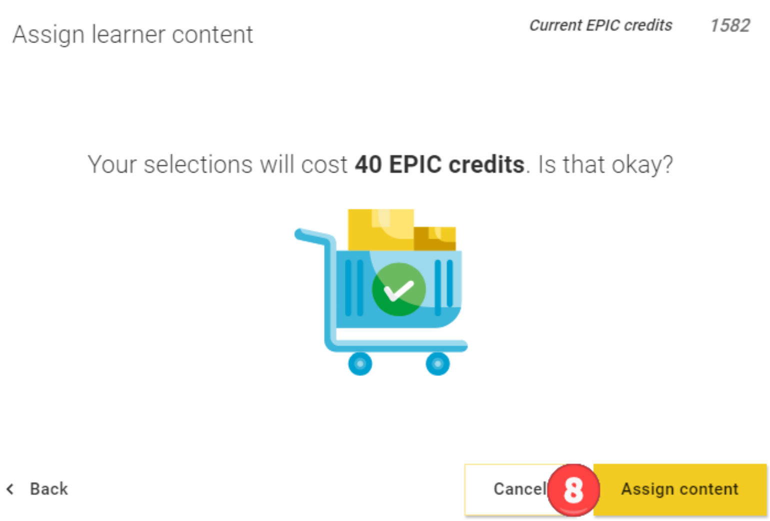


6. A list of the learners from the file and the content you selected appears. The green **+** indicates the content will be unlocked. Click the red **X** to remove a learner from the list.
7. Click **Assign content**.



Name	Email	Workplace 15 credits	Agile EQ 10 credits	Remove
Learner Two	ltwo@noemail.com	✓	+	×
Learner Three	lthree@noemail.com	✓	+	×
Learner One	lone@noemail.com	✓	+	×
Learner Four	lfour@noemail.com	✓	+	×

8. Click **Assign content**.



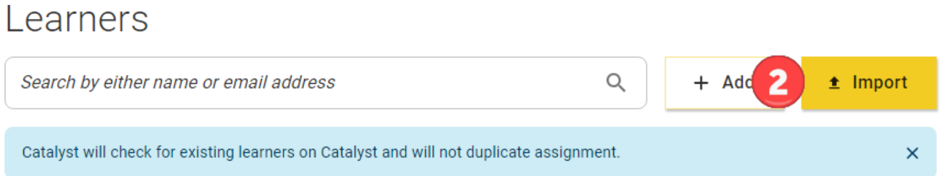
9. Click **Done**. Emails are sent at once. Existing learners with a pending assessment get a reminder. Learners with a complete assessment receive the “add-on content” email notification.

Import Method

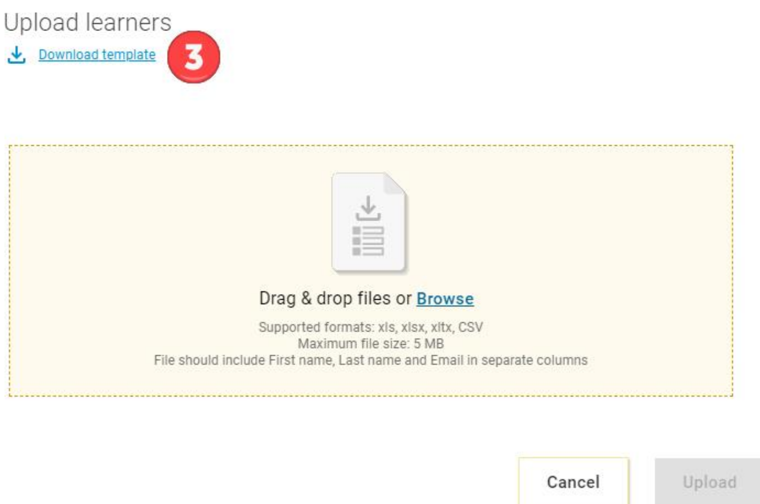
You can also import a list of existing learners and then request to unlock additional content. This method allows you to add a custom message to the invitation in addition to scheduling a future delivery of the invitation and reminder emails.

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.

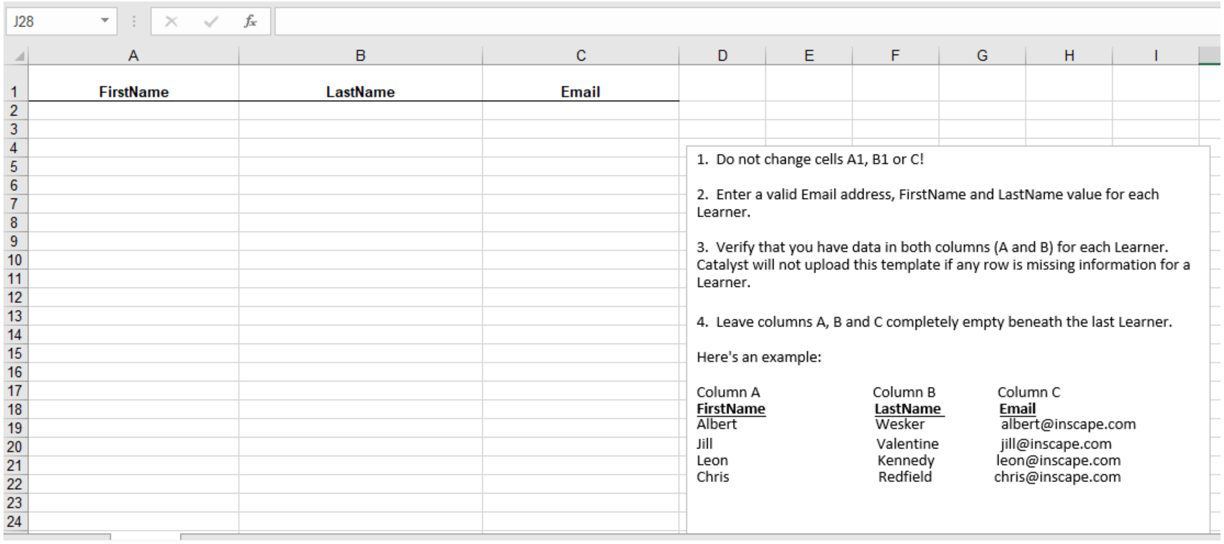
1. From the *Organizations* page, click the organization name.
2. Click **Import** as if you are importing a file of new learners.



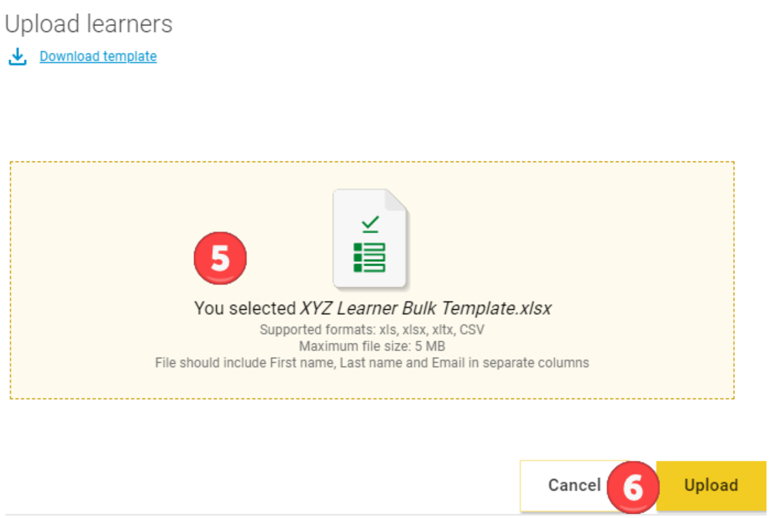
3. Click **Download template**.



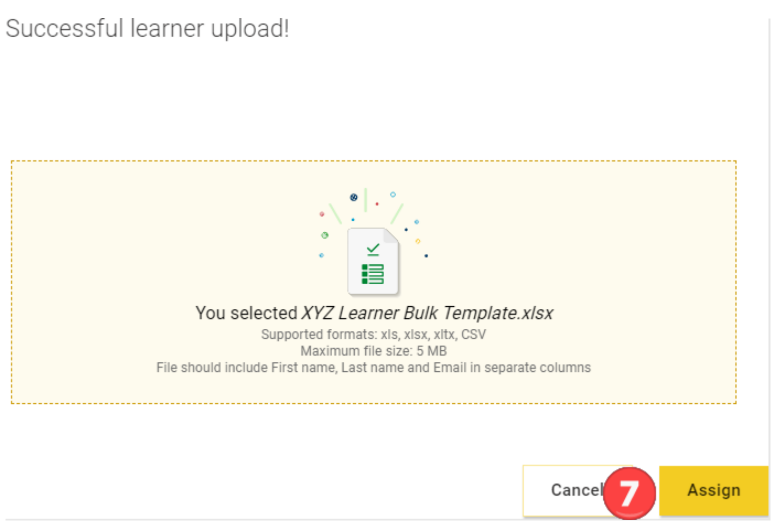
4. Enter the names and email addresses of the **existing** learners and save.



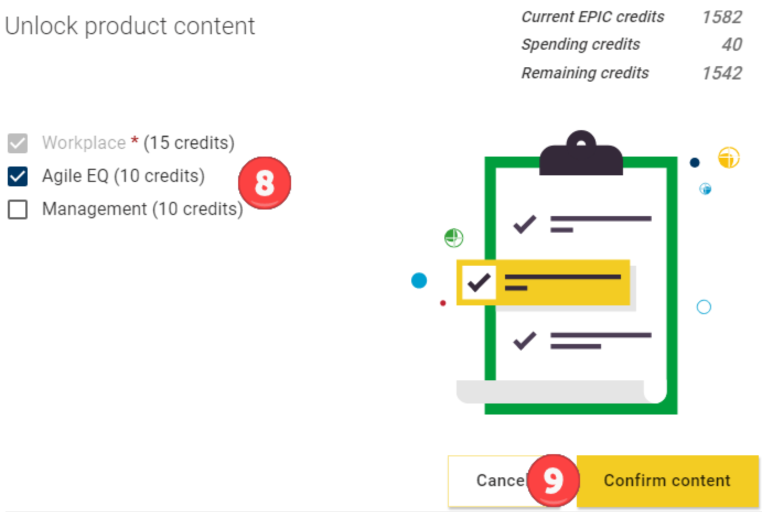
5. Drag and drop the file you created or click **Browse** to find the file.
6. Click **Upload**.



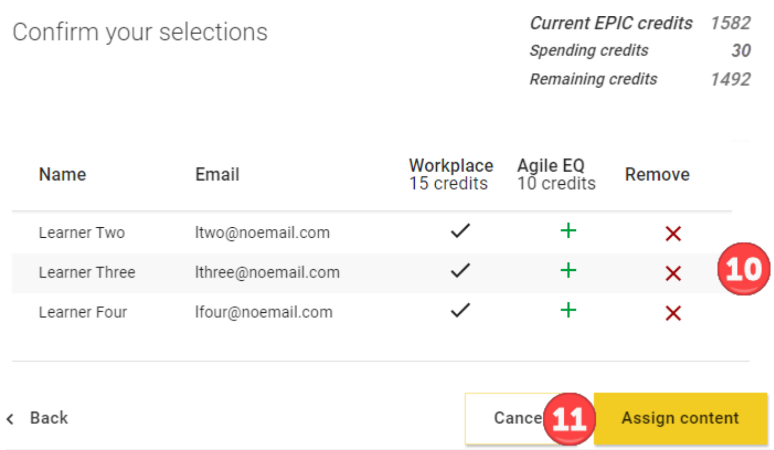
7. Click **Assign**.



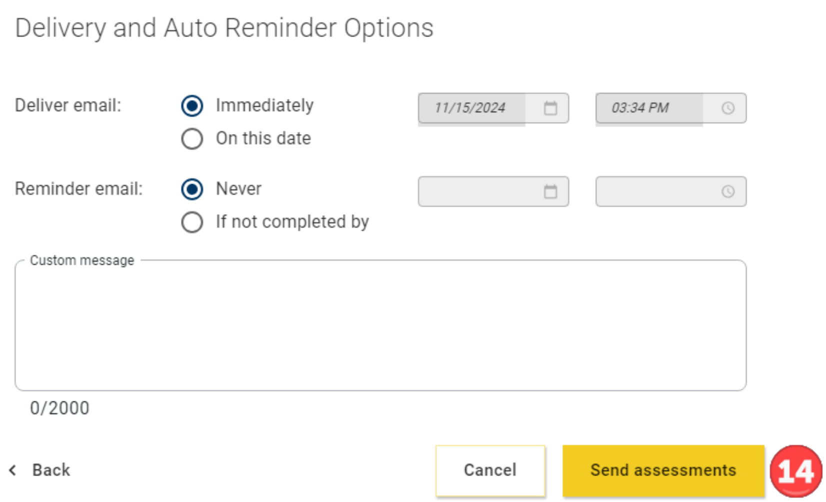
8. Select the content to unlock.
9. Click **Confirm content**.



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 **Assign content**.



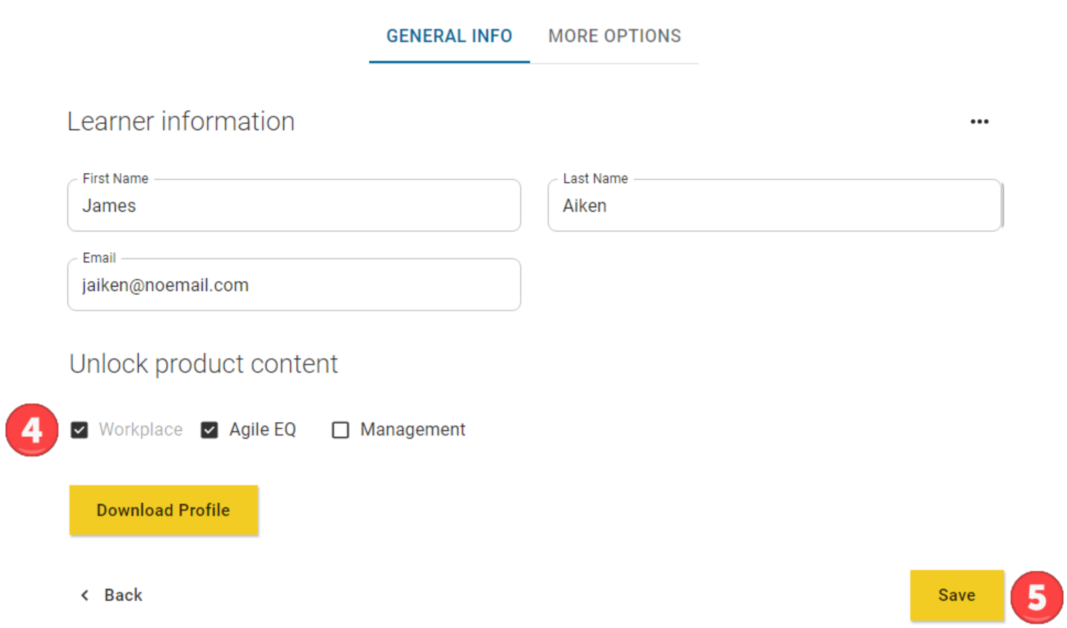
12. Adjust invitation delivery and reminder options, as necessary.
13. Optionally, enter comments.
14. Click **Schedule Assessments**.



15. 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. Select the content.
5. Click **Save**.

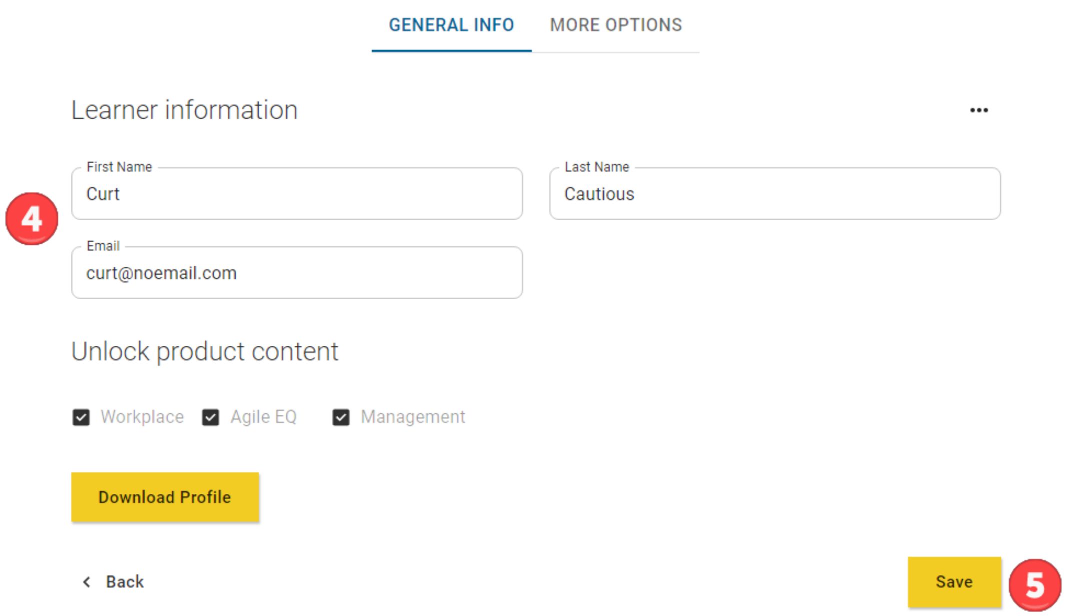


Update Learners

Name and Email

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

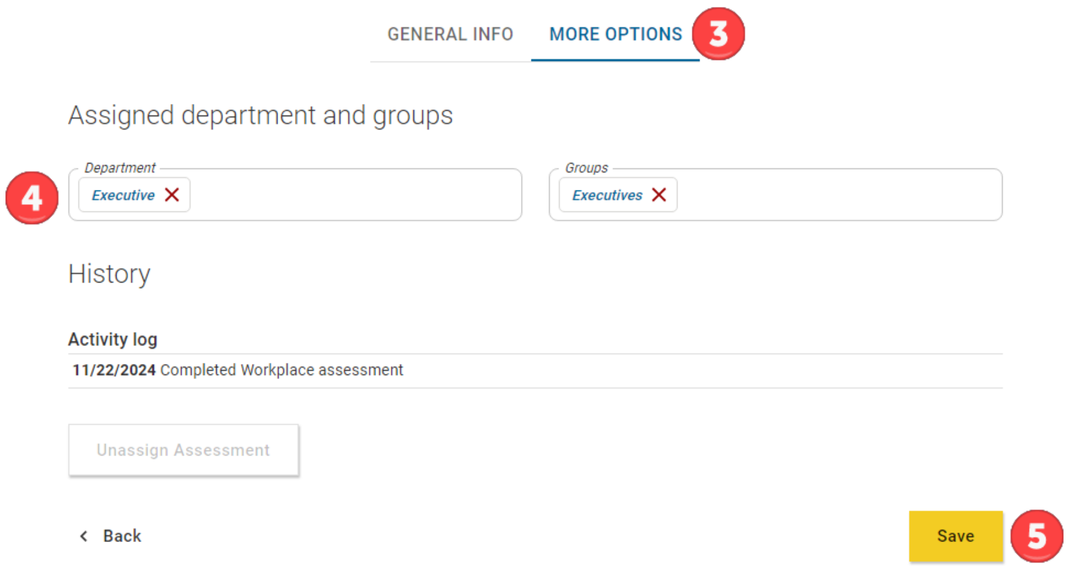
1. From the *Organizations* page, click the organization name.
2. Enter the learner's name or email to search for their record.
3. Click the learner's name from the list.
4. Edit the name or email address.
5. Click **Save**.



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 is depends on whether the learner has created their account.

1. From the *Organizations* page, click the organization name.
2. Click the learner's name.
3. Click **More Options** to view the learner's Department and Groups.
4. If editable, click in either the Department or Group fields to select a department or group.
5. Click **Save**.

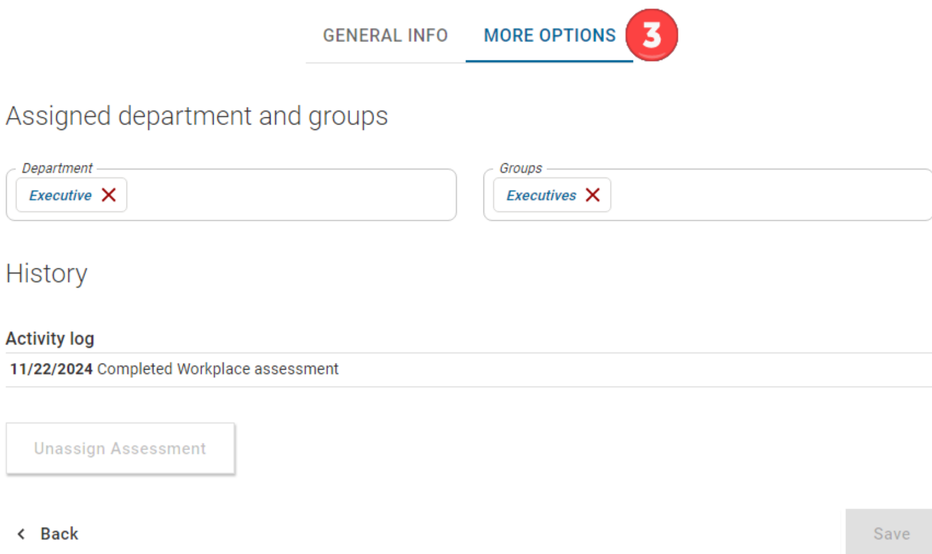


View a Learner's History

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 products were unlocked

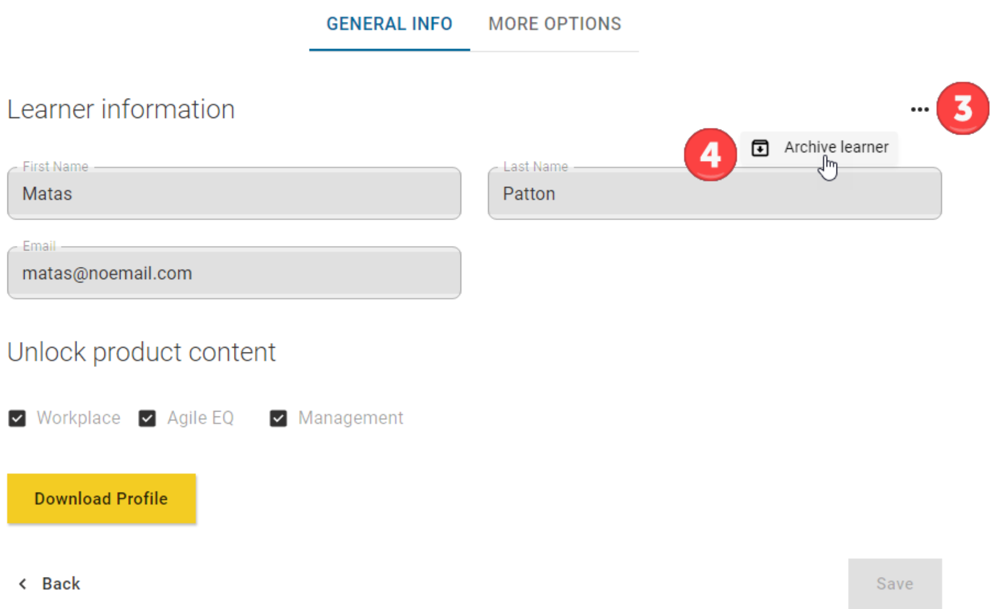
1. From the *Organizations* page, click the organization name.
2. Click the learner's name.
3. Click **More Options**. A list of activities associated with the learner are displayed.



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.

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 the meatball menu.
5. Click **Archive learner**.



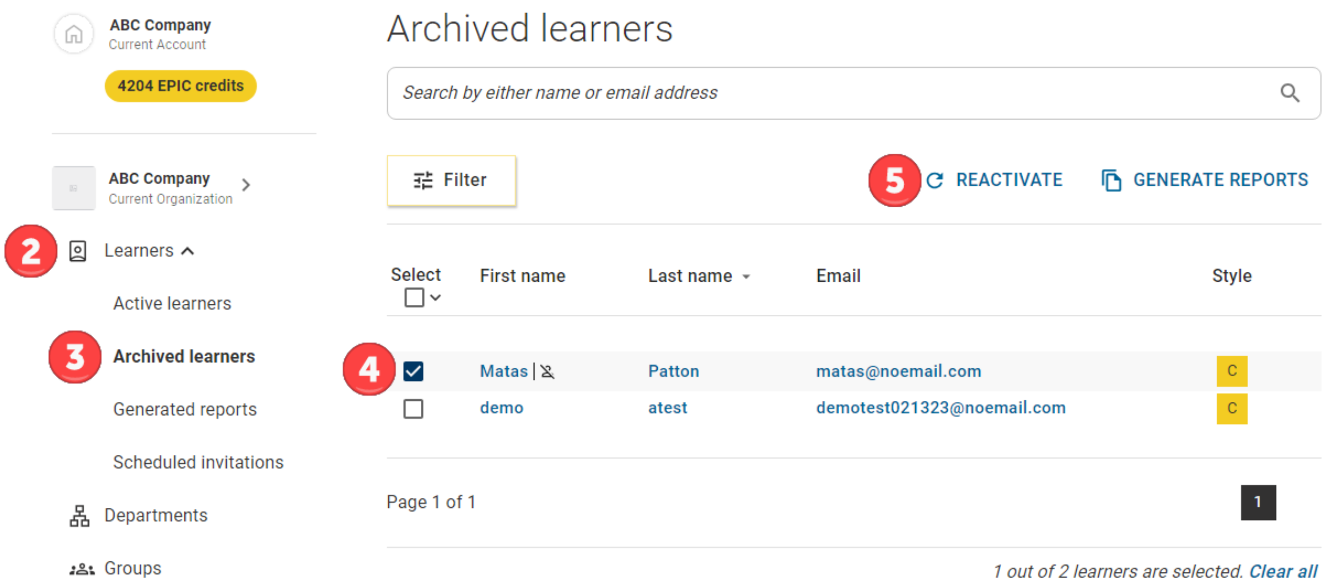
6. Click **Archive**.

Reactivate Learners

Archived learners can be reactivated at any time.

Multiple Learners

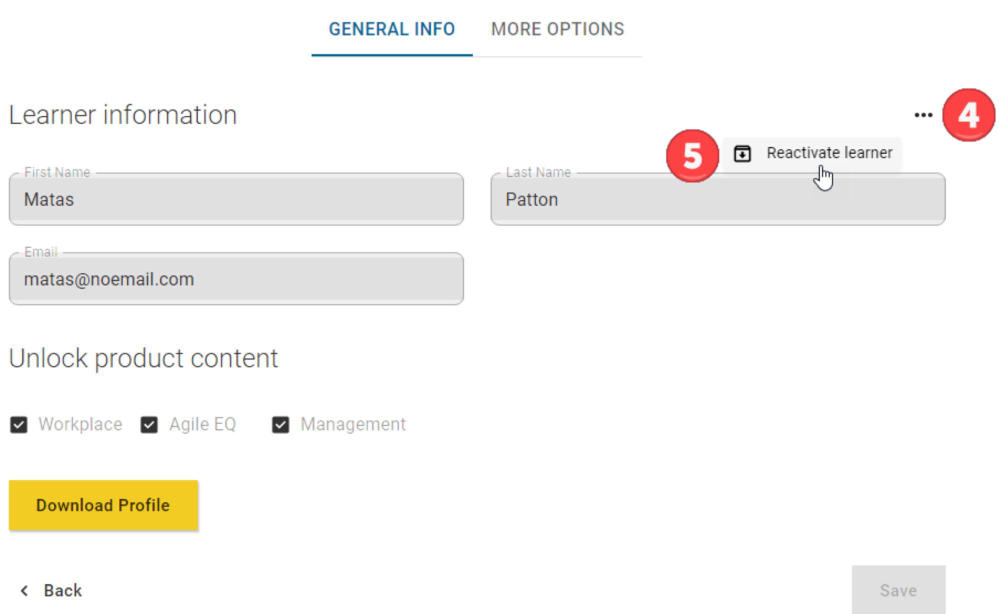
1. From the *Organizations* page, click the organization name.
2. Click **Learners** from the sidebar.
3. Click **Archived Learners**.
4. Select one or more learners to reactivate.
5. Click **REACTIVATE**.



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.

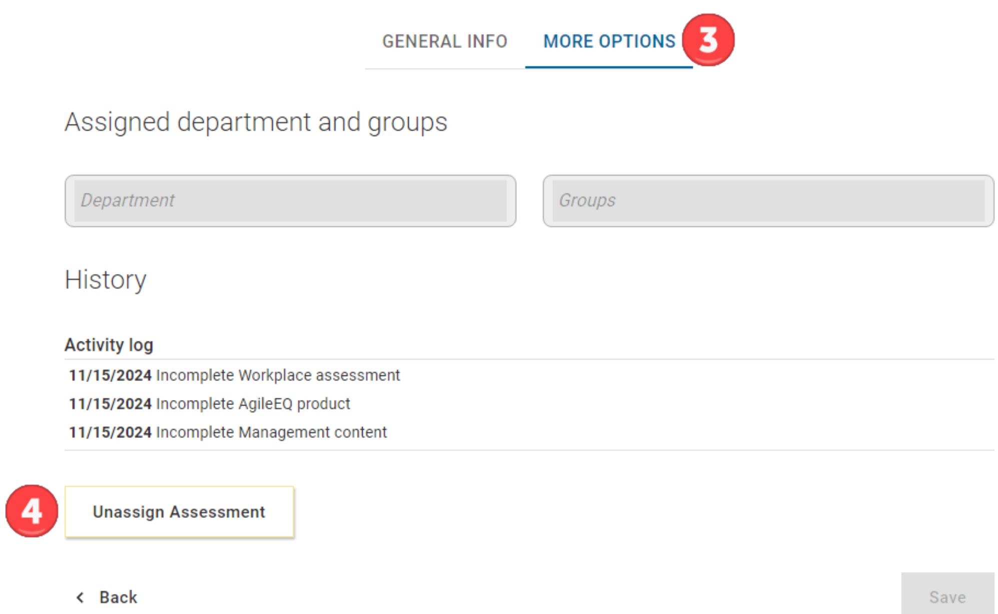
4. Click the meatball menu.
5. Click **Reactivate learner**.



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 **More Options**.
4. Click **Unassign Assessment**.

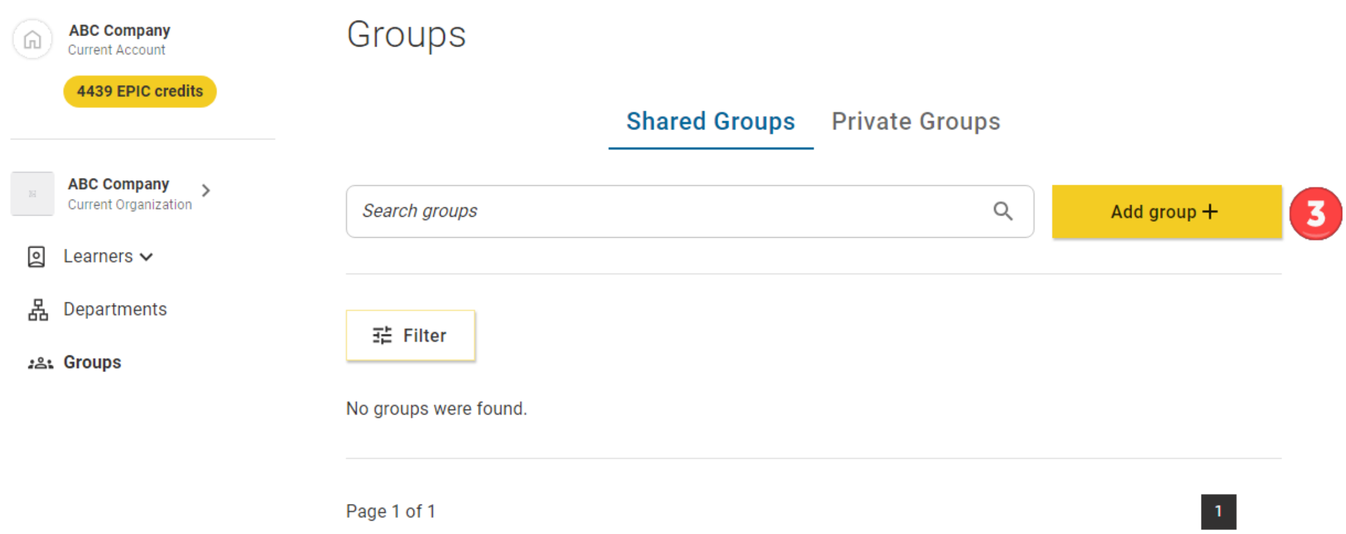


Groups

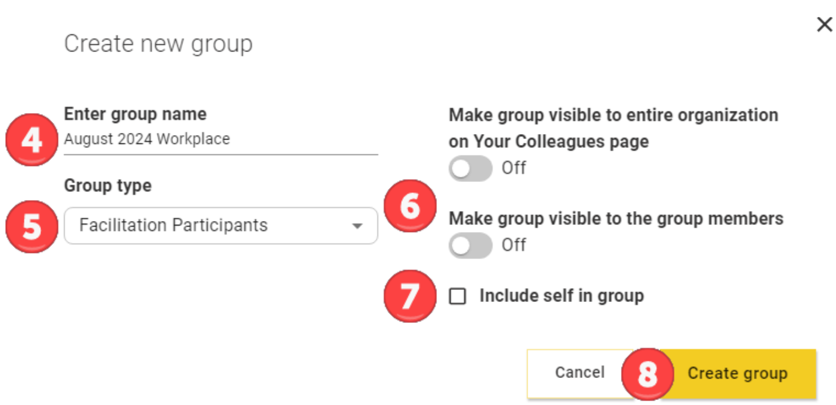
Administrators can create shared groups of learners that allow group members to see each other after completing their assessments. Administrators can also create private groups that are only available in the administrator experience. Private groups allow admins to organize learners for quicker retrieval 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 visibility options for the *Your colleagues* page and individual group members. You can change these settings at any time.
7. Select whether to include yourself in the group.
8. Click **Create group**. The next step is to add group members to the group.



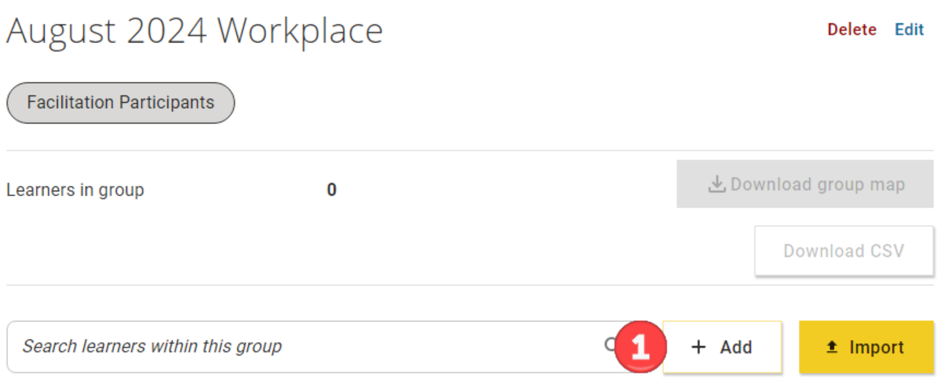
Manage Group Members

You may add up to 500 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.

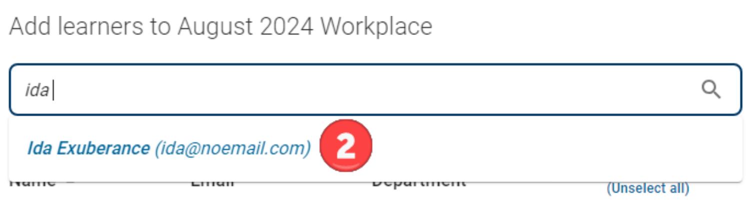
You can add people to a group one-by-one, in bulk, or you can even upload an import file.

Add People Individually

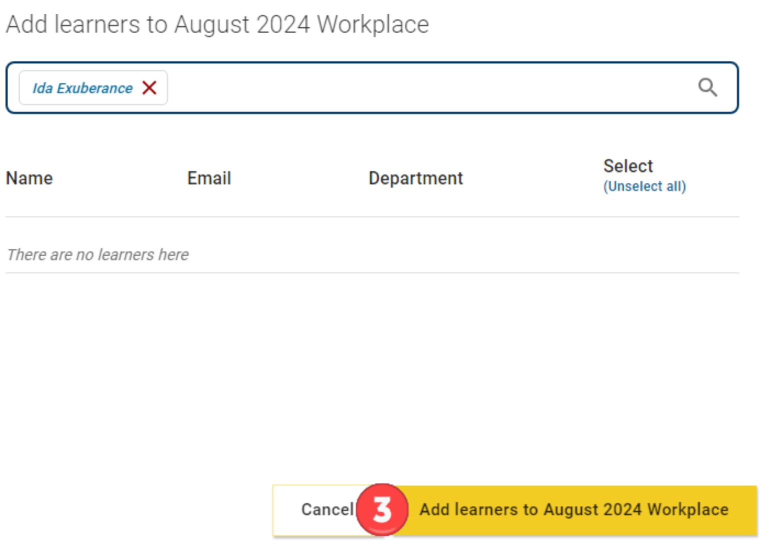
1. Click **+ Add** to access learners that belong to this organization.



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



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

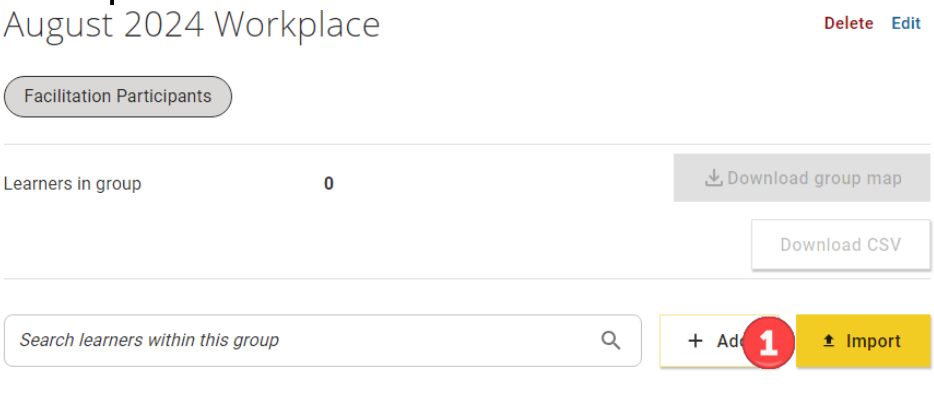


4. Click **Okay**.

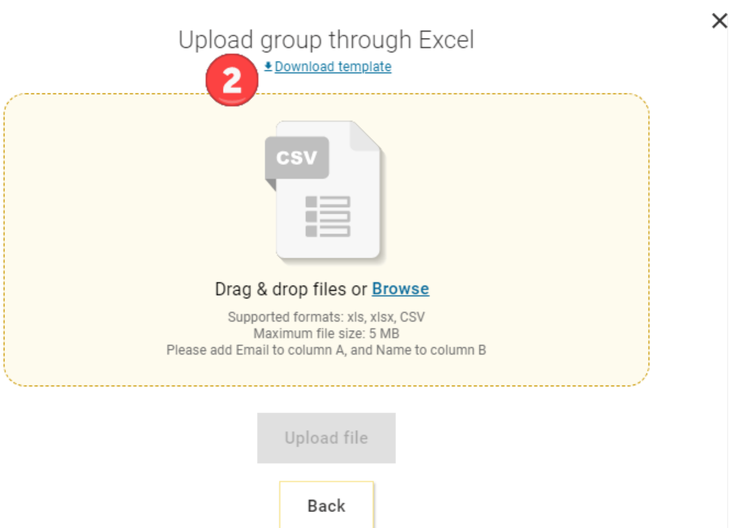
Bulk Import

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.

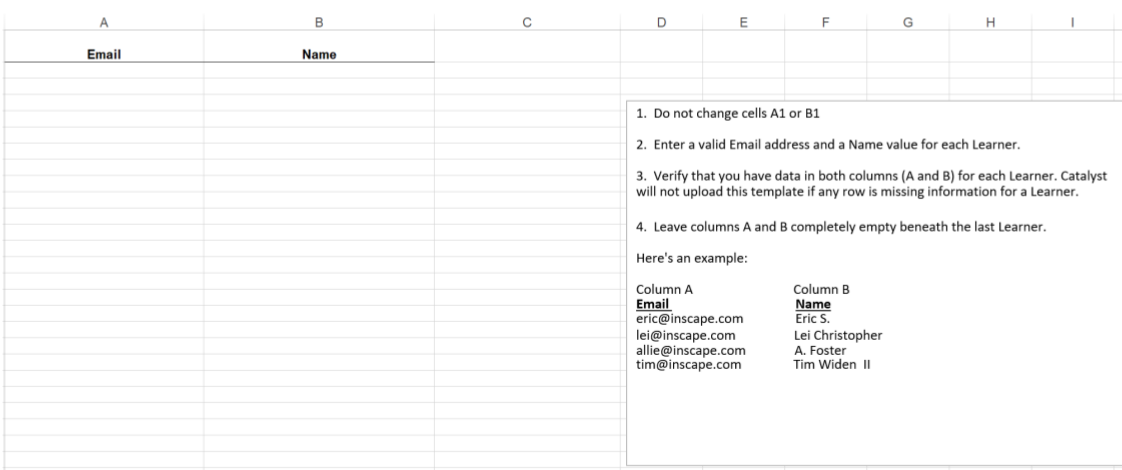
1. Click **Import.**



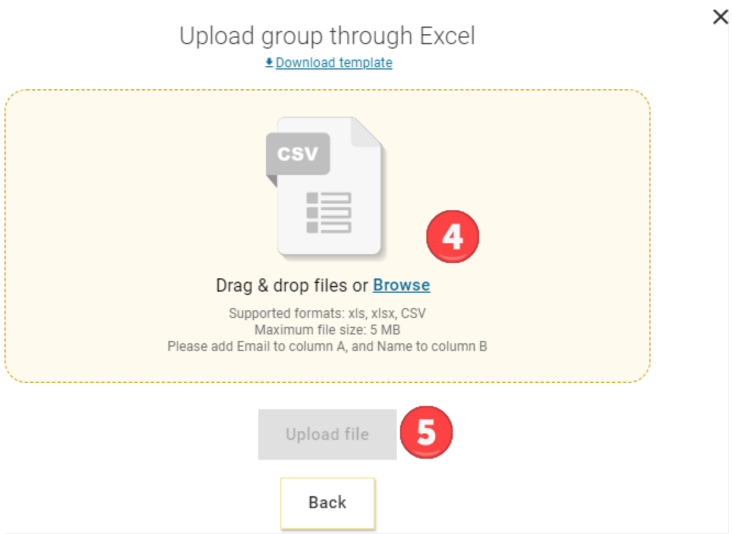
2. Click **Download template**.



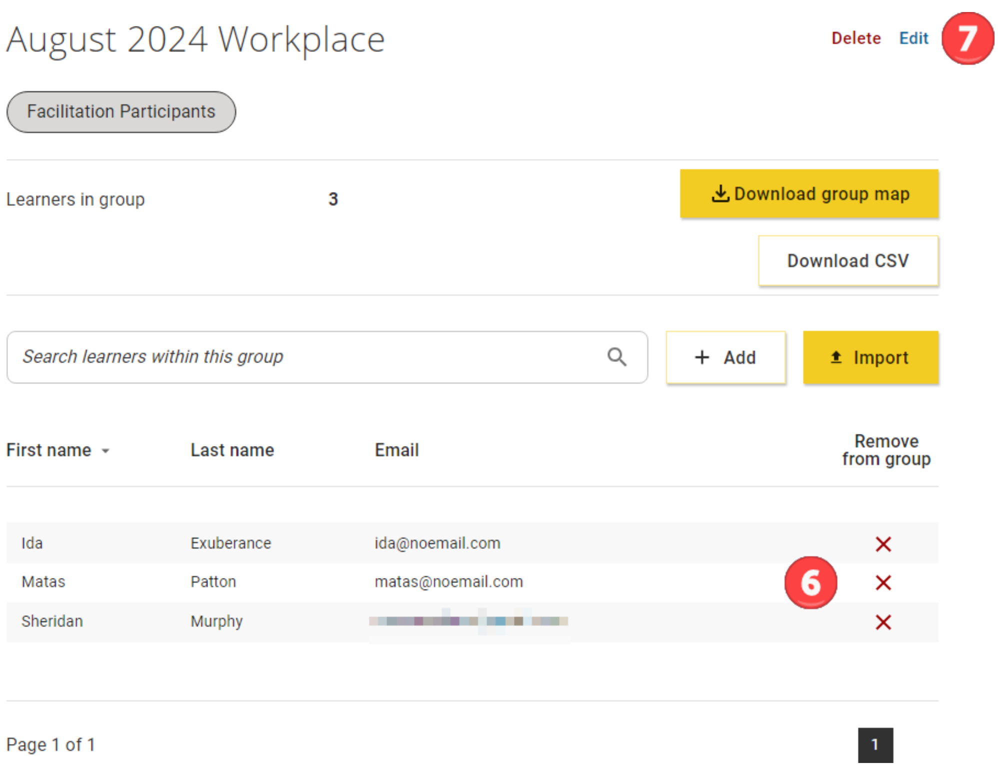
3. Enter the names and email addresses of the learners to add to the group and save.



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.



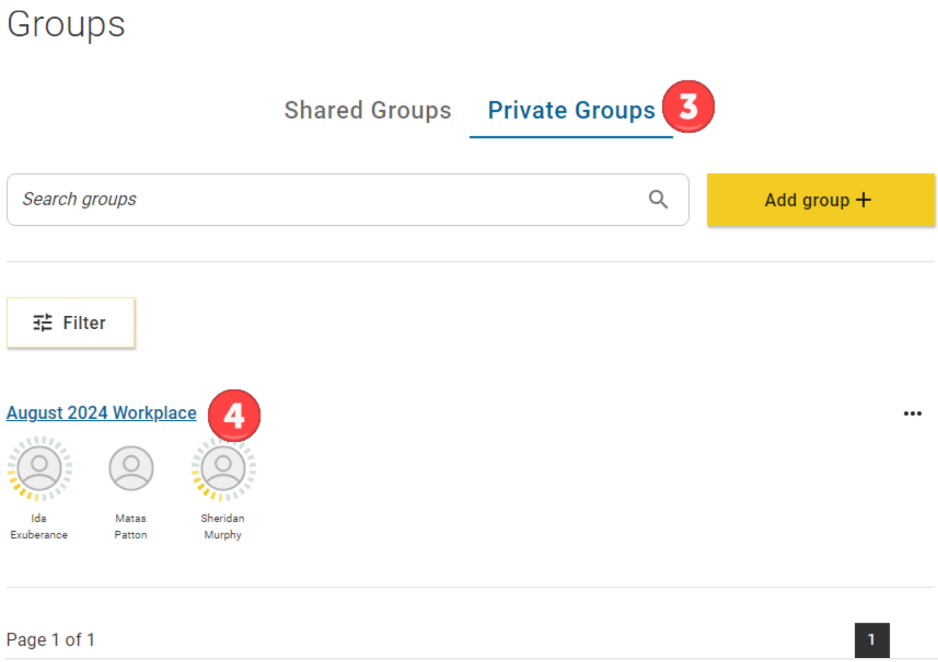
Download Group Information

Group Map Image

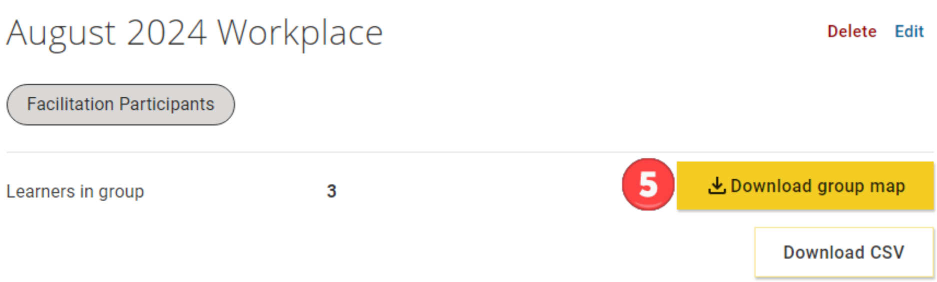
You can download a PNG image of the group's DiSC map. All learners with a shared profile will appear on the group map.

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.



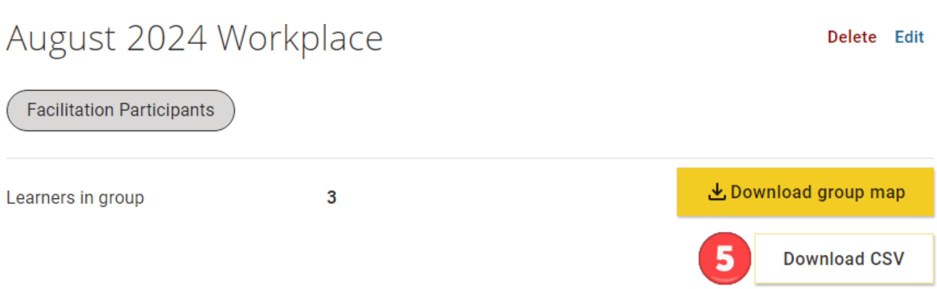
5. Click **Download group map**.



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 the right of the group.
5. Click **Delete**.