

Workplace on Catalyst™ Upgrades in EPIC Admin

Past Everything DiSC Workplace and DiSC Classic learners are eligible for a **FREE** Everything DiSC Workplace on Catalyst upgrade through December 31, 2020. As of January 1, 2021, the cost of an upgrade to Catalyst from a past Workplace or Classic experience is 5 credits. Everything DiSC learners who have experienced any other product can migrate to Everything DiSC Workplace on Catalyst using existing data in EPIC for 15 credits.

When using existing data to create a new Workplace on Catalyst access code, the learner will not be required to take the DiSC portion of the assessment again. Their previous DiSC style scores will be used in the new report. However, when using a DiSC Classic report to create a Workplace on Catalyst access code, the learner's name and email address are carried forward, but the learner will complete the entire Workplace on Catalyst assessment.

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

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

Product Family:	<input type="text" value="Everything DiSC"/>	▼	●
Product:	<input type="text" value="Catalyst: Workplace"/>	▼	●
Language:	<input type="text" value="English"/>	▼	●

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

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

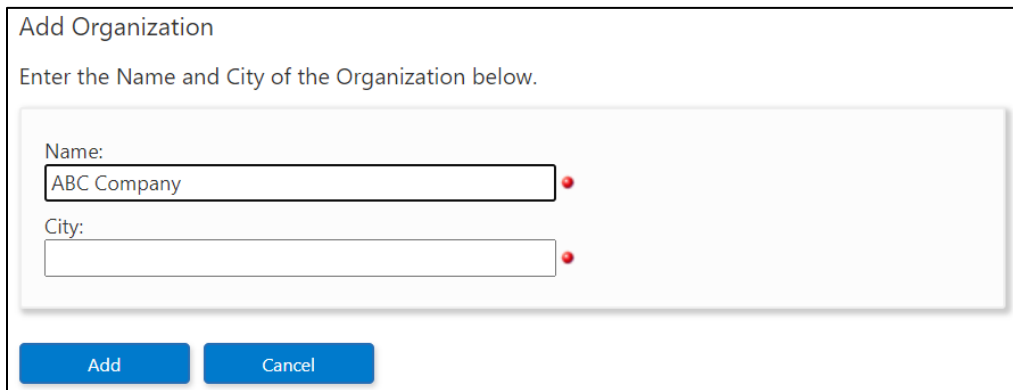
Learners assigned to the same organization will be visible to each other in the online platform. The organization selected here will apply to all learners assigned in this session.

Organization:

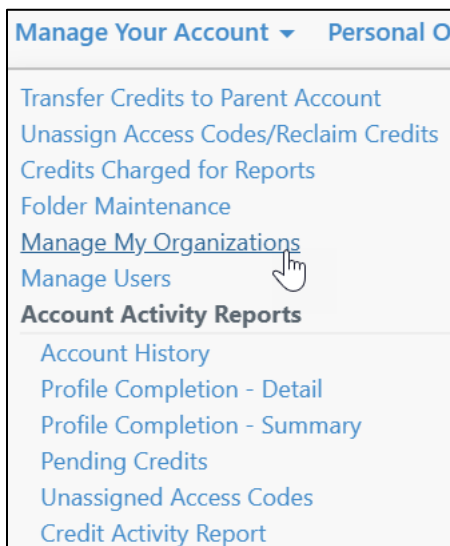
As you begin typing the organization name, organizations that share the same characters appear in the list. If the organization for this set of learners does not appear in the list, just click the **+ Add** option that appears at the top of the list.



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



Note: Any organizations that you add can be edited later from the Manage Organizations page.



All EPIC primary and sub accounts will see the organization in the dropdown list. When you add an organization, it is visible to all EPIC users that have the Workplace on Catalyst product in their account.

- Report Details: Choose a folder and/or sub folder in which to create new Access Codes or select the New Folder link to create a new folder.
- Delivery and Auto Reminder Options: Choose Delivery and Auto Reminder Options.
- Add Respondents: Click the **Use Existing Report** tab and click **Search**.

Enter Individual
Import from Excel
Use Existing Report

Use the **Search** button to locate Respondents who have a completed report.

Note: Respondents will only be required to answer assessment questions that are specific to the new report.

Search

- Enter your search criteria and click **Search**.

Search Criteria

Use the search criteria to filter your results.

Access Code Status: <input type="text" value="Complete"/>	<i>Search by profile status</i>
Name: <input type="text"/>	<i>Search for the partial or entire name of a person or team</i>
Date Range: <input type="text"/> - <input type="text"/>	<i>Search by start and/or end date (Reset)</i>
Product Family: <input type="text" value="Everything DiSC"/>	<i>Search by product family</i>
Product: <input type="text" value="Workplace Profile"/>	<i>Search by product name</i>
Language: <input type="text" value="English"/>	<i>Search by product language</i>
Folder: <input type="text" value="- None Selected -"/>	<i>Search within a folder</i>
Sub Folder: <input type="text" value="- None Selected -"/>	<i>Search within a sub folder</i>
Email: <input type="text"/>	<i>Search for a partial or entire email</i>
Access Code: <input type="text"/>	<i>Search for a specific Access Code</i>
Results Per Page: <input type="text" value="10"/>	<i>Number of results to display per page</i>

Search
Return to Report Setup
Reset

- Select the checkbox(es) to the left of the existing reports that you want to upgrade and click **Next**.

Name: D Stiles

Respondent Name: D Stiles

Email: dstiles@noemail.com

Learner Account Email: dstiles@noemail.com

Access Code: YJRHQ5MYT5

Name: Tommy Tester

Respondent Name: Tommy Tester

Email: tommytester@noemail.com

Learner Account Email: tommytester@noemail.com

Access Code: H7VAVBCRSG

The learners will appear in the list of respondents that will receive an access code. Discounts are reflected in the “Qty/Cr” column.

Enter Individual
Import from Excel
Use Existing Report

After entering the Respondent information, click the **Add** button to add the name to the list. Click the **Assign Access Code(s)** button when you're finished adding Respondents.

(Note: If you assign more than 10 Access Codes, they will be queued for delivery and sent out in intervals to avoid being marked as "spam" by the Respondent's email server.)

Email: Name: Quantity: View Report: **Yes** Add

The list below displays the Respondents that will receive an Access Code. To remove a name from the list, click ✕.

Email	Name	Qty/Cr	View
✕ dstiles@noemail.com Edit	D Stiles ¹	1 (0cr)	Yes
✕ tommytester@noemail.com Edit	Tommy Tester ¹	1 (0cr)	Yes

Total Quantity: 2
Total Credits: 0

¹ One or more respondent(s) qualifies for credit discount.

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

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

10. Click **Assign Access Codes**.

11. Click **OK** to confirm the credit deduction.

12. Click **OK** to customize the email to learners or click **Cancel** to send the default email message. The confirmation page displays a summary of the product, learners, and EPIC credit activity associated with this transaction.