



# Catalyst Administrator Experience

Managing organizations, learners, departments, and groups

Last updated: August 4, 2025

# Table of Contents

Overview .....	4
Getting Started .....	5
User Synchronization .....	5
Login .....	7
Common Components.....	8
Header and Footer.....	8
Account Settings .....	9
Sidebar .....	11
Accounts.....	12
Organizations .....	13
Create Organizations .....	14
Update Organizations.....	15
Delete Organizations.....	16
Departments .....	17
Create Departments .....	17
View & Update Departments .....	18
Manage Learners .....	19
View Learners in a Department .....	19
Add Learners to a Department .....	19
Remove Learners from a Department .....	23
Transfer Learners Between Departments.....	24
Delete Departments.....	27
Learners.....	28
Assign Catalyst to New Learners.....	28
One-by-One .....	28
Bulk Import .....	31
Manage Scheduled Invitations & Reminders.....	37
Change Invitation Send Date/Time .....	38
Change Reminder Send Date/Time.....	39
Search for Learners & Filter Search Results .....	40
Send Ad Hoc Reminders to Learners.....	42
Generate Reports.....	43
Multiple Learners .....	43
Individual Learner .....	45
Reveal Style .....	46

Multiple Learners .....	46
Individual Learners .....	47
Unlock Additional Content for Existing Learners .....	48
Multiple Learners .....	48
Individual Learner .....	58
Update Learners .....	59
Name and Email .....	59
Department and Groups .....	60
View a Learner's History .....	61
Archive Learners .....	62
Individual Learner .....	62
Multiple Learners .....	63
Reactivate Archived Learners .....	64
Multiple Learners .....	64
Individual Learner .....	64
Unassign Assessments .....	66
Groups .....	67
Create Groups .....	67
Manage Group Members .....	68
Add Group Members Individually .....	68
Bulk Import Group Members .....	69
Download Group Information .....	71
Group Map Image .....	71
Group Map List .....	71
Delete Groups .....	73

## 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*

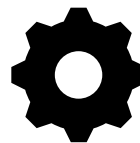


**Users** in Catalyst can have the administrator and/or the learner role. The role determines activities the user can perform. Administrators manage access to an organization's Catalyst data, and a learner consumes the interactive Catalyst learning content. A user can be an administrator in multiple organizations, but their learner role can only be associated with one organization.

Learner

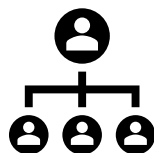


Administrator



**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:

4

Enter your Catalyst Password:

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 [redacted] will be synced with the Catalyst profile [redacted]. 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		
<input checked="" type="checkbox"/> 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			
<input checked="" type="checkbox"/> Send notification email when a respondent completes a profile				
<a href="#">Edit</a>				

## 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**.



Reimagine your world with  
DiSC®

## Sign in

Email

Enter your email address

Continue

New to Catalyst™? [Create an account](#)

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.



Reimagine your world with  
DiSC®

## Enter password

matas@noemail.com [Change email](#)

Password

Enter your password

[Show](#)

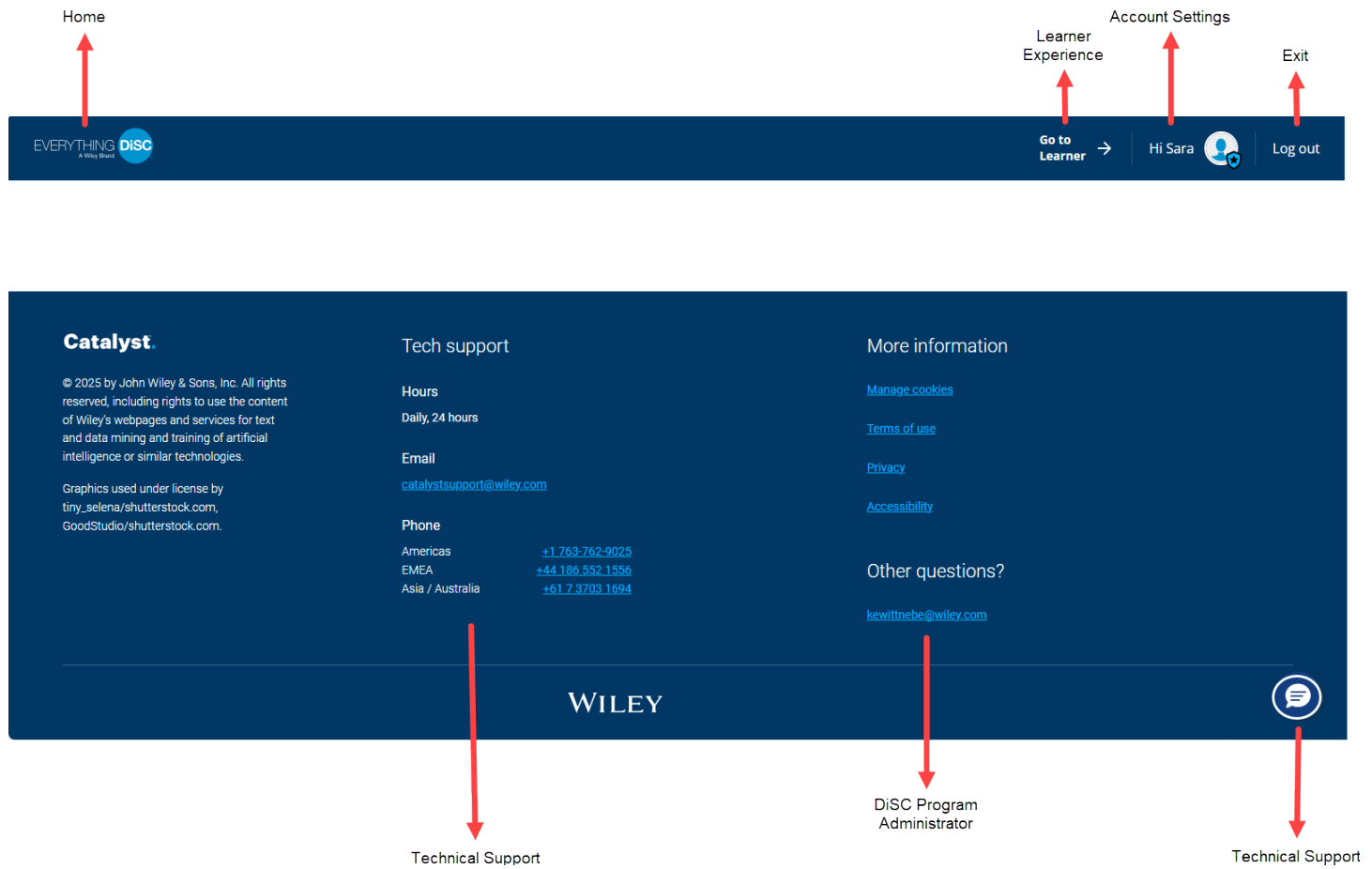
Sign in

[Forgot your password?](#)

## Common Components

### Header and Footer

The persistent Catalyst header provides navigation and 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.

The screenshot shows the 'Your information' page in the Catalyst Administrator. The left sidebar contains navigation links: Home, DiSC style, Colleagues, Groups, Get advice, Level 1, Workplace, Management, Agile EQ, DiSCology, and Account settings (highlighted). The main content area has a breadcrumb trail: Home > Account settings > Your information. The 'Your information' section includes a profile photo placeholder with 'Upload new photo' and 'Remove photo' options. Below this are fields for Name (First name: John, Last name: Doe), Language (English), and Department (Choose your department). Each field has 'CANCEL' and 'SAVE' buttons. A note states: 'Worksmart, Agile EQ™ and Management are only available in English'. At the bottom, there is a link to 'CREATE A DEPARTMENT'.

3. Click the **Login/password** tab to update your email or password.

The screenshot shows the 'Login & password' page in the Catalyst Administrator. The left sidebar is identical to the previous screenshot, with 'Account settings' highlighted. The main content area has a breadcrumb trail: Home > Account settings > Login/password. The 'Login & password' section includes fields for Email (JohnD@wiley.com) and Password (masked with asterisks). Each field has an 'EDIT' button.

4. Click the **Privacy/communication** tab to adjust your sharing and communication preferences.

The screenshot shows the 'Privacy & communication' settings page. The left sidebar contains navigation links: Home, DiSC style, Colleagues, Groups, Get advice, Level 1, Workplace, Management, Agile EQ, DiSCology, and Account settings (highlighted). The main content area has a breadcrumb trail: Home > Account settings > Privacy/communication. The title is 'Privacy & communication'. The text explains that sharing with colleagues allows them to see your DiSC® information and for you to see theirs. It recommends sharing to get the most out of the Everything DiSC® on Catalyst™ experience. There is a link 'Learn more' under 'Curious about what your colleagues can see about you?'. The 'Share with colleagues' section has two radio buttons: 'On' and 'Off' (selected). Below this, there is a section for email preferences: 'We'd love to reach out to you by email to let you know when we add new features to Catalyst. You can set your email preference here or unsubscribe via those emails at any time. Do you want to receive emails with feature updates?'. This section also has 'On' and 'Off' (selected) radio buttons.

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

The screenshot shows the 'Practitioner experience' settings page. The left sidebar is identical to the previous screenshot, with 'Account settings' highlighted. The main content area has a breadcrumb trail: Home > Account settings > Practitioner experience. The title is 'Practitioner experience'. The text explains that adding a serial number below will unlock the facilitator library and Practitioner Experience features. It states that the serial number is part of a Catalyst Practitioner Experience subscription and can be used once. It lists features that will be unlocked: 'Learner view of "What drives you"', 'Group insights', 'Unlimited group reports, including the Facilitation report and the Group Culture report', and 'Learner comparison feature'. There is a link 'onboarding walkthrough'. The 'Serial number and Auto-renewal' section contains a text input field labeled 'Serial number' and a yellow 'Redeem' button.

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.

EVERYTHING DiSC  
A Wiley Brand

Go to Learner → Hi Sheridan Log out

ABC Company  
Current Account

753 EPIC credits

ABC Company  
Current Organization

Learners ▾

Departments

Groups

Learners

Search by either name or email address

+ Add Import

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

Filter

SEND REMINDER EMAIL UNLOCK CONTENT

Email	Status
ida@noemail.com	Complete

1


0 out of 1 learners are selected. Clear all

## 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.

EVERYTHING DiSC  
A Wiley Brand

Go to  
Learner →

Hi Sheridan 

Log out

Welcome!  
The Catalyst™ Administrator  
Experience

Accounts

ABC Company >

XYZ Company >

Page 1 of 1

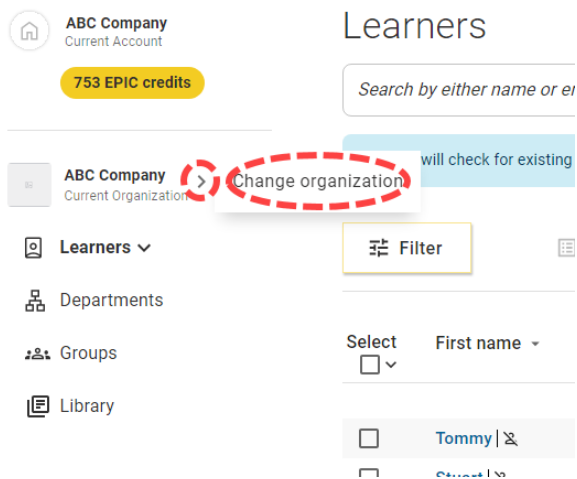
1

# Organizations

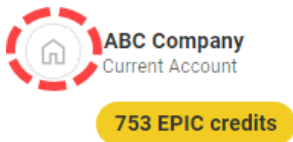
Before you can work with a department, learner, or group, you first must select an organization from the *Organizations* page. This page displays the different organizations associated with your Account; any organizations created on this page will also appear in the associated EPIC account and vice versa.

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.



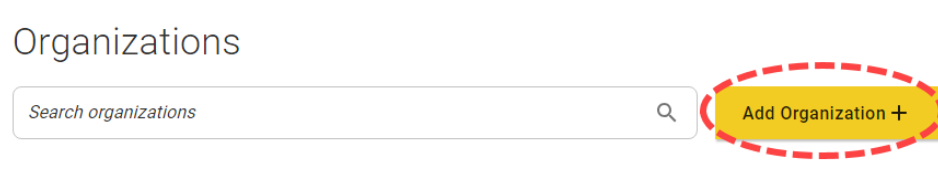
If you synchronized your Catalyst user with multiple EPIC accounts, you might need to change accounts before switching organizations. In that case, first click the “home” link to pick a new account so you can then select a different organization.



## 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 +**.

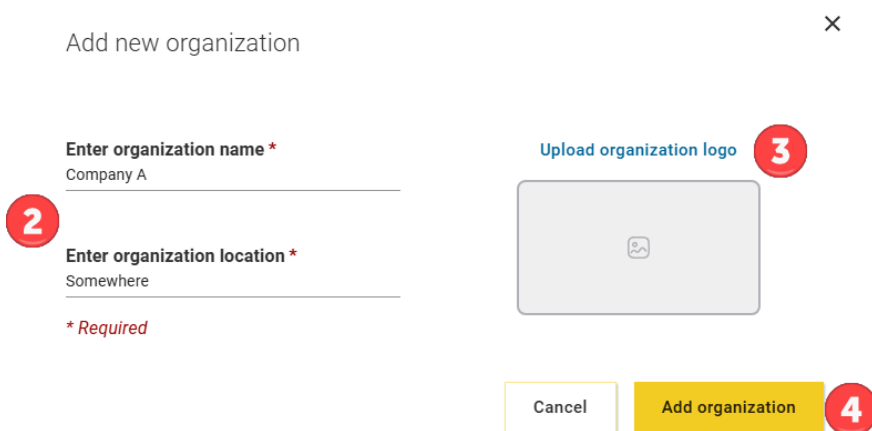


Organizations

Search organizations

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**.



Add new organization

Enter organization name \*

Company A

2

Enter organization location \*

Somewhere

\* Required

Upload organization logo 3

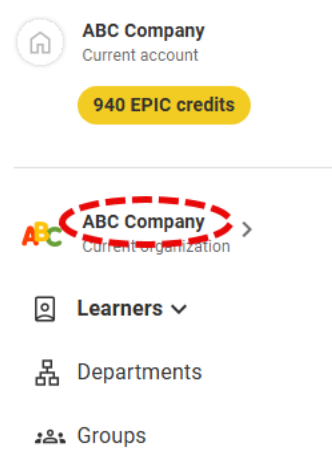
4

Cancel 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.

ABC Company		Delete	Edit
Logo			Edit
Location	Anytown	3	Edit
Organization ID	1000010		Copy
Assigned assessments in organization	2	4	View

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.

2

XYZ Company

>

Current organization

Learners ▾

Departments

Groups

- 3. Click **Delete organization**.

XYZ Company

3DeleteEdit

Logo

Edit

Location

Somewhere

Edit

Organization ID

1000601

Copy

Assigned assessments in organization

0

View



# 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.

Departments

Search departments

Q

Add department +

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

Assign

Department name	Learners in department	
<a href="#">Engineering and Development</a>	1	<div><div>4</div><div>...</div><div>3</div></div>
<a href="#">Customer Service</a>	1	<div><div>5</div><div><div>Edit</div><div>Transfer</div><div>Delete</div></div><div>...</div></div>
<a href="#">Sales</a>	1	<div><div>...</div></div>
<a href="#">Human Resources</a>	0	<div><div>...</div></div>

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.

Sales

Delete

Edit

Learners in department

4

Transfer

Search learners within this department

Q

+ Add

Import

First name ^	Last name 4	Transfer to new department	Remove from department
Ida	Exuberance	↔	×
5  Matas	Patton	↔	×
Sheridan	Murphy	↔	×

Page 1 of 1

1

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.

Departments

Search departments

Q

Add department +

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

3 Assign

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

Assign learners in your organization ×

Search by either name or email address Q

Name ^	Email	Department
Ida Exuberance	ida@noemail.com	<span>Sales</span> <span>×</span>
Jane Doe	janedoe774@gmail.co	<span>4</span> <span>Customer</span> <span>▲</span>
Matas Patton	matas@noemail.com	<span>Customer Service (2 people)</span>

Cancel 5 Done

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**.

Sales Delete Edit

Learners in department 0 Transfer

Search learners within this department Q 4 + Add Import

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

Add learners to Sales ×

ida 2 Q

Ida Exuberance (ida@noemail.com)

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

Add learners to Sales

×

All learners in ABC Company

Name	Email	Department	Select
There are no learners here			

Cancel

3

Add learners to Sales

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.

Assigned department and groups

4

Department

Engineering and Development ( people)

Executive ( people)

Human Resources ( people)

Sales ( people)

Groups

Reclaim unused credits

< Back

Save

5. Click **Save**.

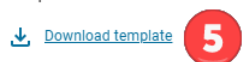
### Bulk Import from the Department


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**.

- Click **Download template** to download an Excel template. Enter the learner's information into the template and save.

Import learners to department



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



Drag & drop files or [Browse](#)

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


Import

Cancel

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

Import learners to department



 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

- The import results are displayed.
- Click the **Download learners with errors** link to download a CSV of the individuals that were not imported.
- Click **Exit** to close the modal.

Import status

8

2 learner(s) imported successfully.

×

1

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

- From the *Organizations* page, click the organization name.
- Click the learner's name.
- 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**.

LEARNER INFO

ASSESSMENT INFO

Learner information

Archive learner

First Name

Marsha

Last Name

Manager

Email

marshamanager@noemail.com

Assigned department and groups

Department

Groups

< Back

Update learner

4

*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.

Sales

Delete Edit

Learners in department2Transfer

Search learners within this department

+

Add

Import

First name	Last name	Transfer to new department	Remove from department
Curt	Cautious		<div>X</div>
Matas	Patton		<div>X</div>

Page 1 of 1

1

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.



- Click the meatball menu '...' to the right of the department.
- Click **Transfer**.

## Departments

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

Department name	Learners in department ▾	
<a href="#">Sales</a>	5	...
<a href="#">Customer Service</a>	2	<div> <div>4</div> <div> <div>Edit</div> <div>Transfer</div> <div>Delete</div> </div> </div>
<a href="#">Technology</a>	0	...
<a href="#">Human Resources</a>	0	...

- Select a department.
- 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.

- From the *Organizations* page, click the organization name.
- Click **Departments** from the sidebar.
- Click the department name from the list.
- Click **Transfer**.

Sales

Delete Edit

Learners in department 5
 


4

Transfer

- Select a department.
- Click **Transfer**.

### One Learner

- From the *Organizations* page, click the organization name.
- Click **Departments** from the sidebar.
- Click the department name from the list.

4. Click  to the right of the learner.








## Sales

Delete Edit

Learners in department

3

Transfer

<input type="text" value="Search learners within this department"/>		<input type="button" value="Add"/>	<input type="button" value="Import"/>
First name ^	Last name	Transfer to new department	Remove from department
Ida	Exuberance		
 Matas	Patton	 <b>4</b>	
Sheridan	Murphy		

Page 1 of 1

1

5. Select the new department.

6. Click **Add to department**.

Transfer department

<input type="text" value="Search by department name"/>		
Name	Number of people in department	Select
Editors	105	<input type="checkbox"/>
Sales	88	<input type="checkbox"/>
Technology	84	<input checked="" type="checkbox"/> <b>5</b>
People Organization	80	<input type="checkbox"/>

**6**

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**.

Departments

Search departments

Q

Add department +

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

Assign

Department name	Learners in department	
<a href="#">Sales</a>	5	...
<a href="#">Customer Service</a>	2	...
<a href="#">Technology</a>	0	...
<a href="#">Human Resources</a>	0	...
<a href="#">Executive</a>	0	...
<a href="#">Engineering and Development</a>	0	<div><div>Edit</div><div>Transfer</div><div>Delete</div></div>

Page 1 of 1

1

# 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.

#### Learners

**2** + Add Import

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

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**.

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

#### Add learners

**3**

Add + **4**

ⓘ Connect to Group: Marketing team ✕ Product Team ✕ **5** 🔍

ⓘ Reveal style 🔴 🔵 **6**

Name	Email	Remove
Jonathan Fisher	JFisher@gmail.com	✕
Izzy Davis	Izzydavis@gmail.com	✕
Leonard Geraldine	LeoG.@wiley.com	✕
Katherine Fogle	KFogle@wiley.com	✕
Leonard Geraldine	LeoG.@wiley.com	✕

< Back

Cancel Add Learner **7**

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

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

Current EPIC credits: 180

Spending credits: 125

Remaining credit: 55

Unlock product content

<div style="text-align: right; font-weight: bold; font-size: 0.8em;">REQUIRED</div> <h2 style="margin: 0;">Workplace</h2> <p style="margin: 0; font-size: 0.8em;">15 CREDITS PER USER</p> <p>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.</p> <p>What's included:</p> <div style="display: flex; flex-wrap: wrap;"><div style="width: 50%;">✓ DiSC assessment</div><div style="width: 50%;">✓ Conversation starters</div><div style="width: 50%;">✓ Colleagues</div><div style="width: 50%;">✓ DiSCology</div><div style="width: 50%;">✓ Groups</div><div style="width: 50%;">✓ Language included: English</div><div style="width: 50%;">✓ Get advice tool</div></div> <div style="margin-top: 10px;"><p style="font-size: 0.8em; margin: 0;">LANGUAGE ADD-ONS</p><div style="display: flex; align-items: center;"><input type="checkbox"/> Danish (+7 credits per user) ⓘ</div></div> <div style="margin-top: 10px;"><p style="font-size: 0.8em; margin: 0;">APPLICATION ADD-ONS (ENGLISH ONLY)</p><div style="display: flex; align-items: center;"><input checked="" type="checkbox"/> Management (+10 credits per user) ⓘ</div><div style="display: flex; align-items: center; margin-top: 5px;"><input type="checkbox"/> Agile EQ (+10 credits per user) ⓘ</div></div>	<div style="text-align: right; font-weight: bold; font-size: 0.8em;">RECOMMENDED</div> <div style="text-align: right; margin-bottom: 10px;"><input type="radio"/></div> <h2 style="margin: 0;">Worksmart</h2> <p style="margin: 0; font-size: 0.8em;">+20 CREDITS PER USER +10 CREDITS PER USER</p> <p>Worksmart is a short-form, facilitated training and action-planning experience that helps <b>people managers</b> apply DiSC® insights to the challenges they face every day.</p> <p>What's included:</p> <div style="margin-top: 10px;"><div style="display: flex; align-items: center;"><div style="margin-right: 10px;">✓</div><div>Action planning tool</div></div><div style="margin-top: 10px;"><div style="display: flex; align-items: center;"><div style="margin-right: 10px;">✓</div><div>5 training modules:</div></div><div style="margin-left: 20px;">Delivering constructive feedback</div><div style="margin-left: 20px;">Empowering your team</div><div style="margin-left: 20px;">Navigating change (Coming soon!)</div><div style="margin-left: 20px;">Managing conflict (Coming soon!)</div><div style="margin-left: 20px;">Motivating your team (Coming soon!)</div></div></div>
-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

< Back

Cancel

Unlock Content

8

9. 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:	<input checked="" type="radio"/> Now	<input type="text" value="02/22/2024"/>	<input type="text" value="10:00 PM"/>
	<input type="radio"/> On selected date		
Send reminder email:	<input checked="" type="radio"/> Never	<input type="text" value="02/22/2024"/>	<input type="text" value="10:00 PM"/>
	<input type="radio"/> 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

4 Summary

Summary

Current EPIC credits: 180

Spending credits: 125

Remaining credit: 55

Learners

EDIT

Total: 25

Groups connected: Marketing team, Product Development

Style: Revealed

Content

EDIT

Product	Learners	Credits
Worksmart	25	500
Add-on: Danish	25	175

Email options

EDIT

Send invitation email: 01/01/25 at 10:00 am

Send reminder email: Never

Email template language: English

< 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**.

### Learners

Search by either name or email address

+ Add

2

Import

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

X

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**.

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

## Upload learners

[Download template](#)

3



Drag & drop files or [browse](#)  
Supported formats: xls,xlsx, csv  
Maximum file size: 5 MB

4

Cancel

Upload learners

5

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**.

1 Add learners
2 Unlock content
3 Email options
4 Summary

### Add learners

First name

Lily

Last name

Pad

Learner email address \*

LilyPad@gmail.com

Add +

Connect to Group:

Marketing team X

Product Team X

7

Reveal style

8

Name	Email	Remove
Jonathan Fisher	JFisher@gmail.com	X
Izzy Davis	Izzydavis@gmail.com	X
Leonard Geraldine	LeoG.@wiley.com	X
Katherine Fogle	KFogle@wiley.com	X
Leonard Geraldine	LeoG.@wiley.com	X

< Back

Cancel

Add Learner 9

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

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

Current EPIC credits: 180

Spending credits: 125

Remaining credit: 55

### Unlock product content

REQUIRED	RECOMMENDED
<div><h4>Workplace</h4><p>15 CREDITS PER USER</p><p>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.</p><p>What's included:</p><ul style="list-style-type: none"><li>✓ DiSC assessment</li><li>✓ Colleagues</li><li>✓ Groups</li><li>✓ Get advice tool</li><li>✓ Conversation starters</li><li>✓ DiSCology</li><li>✓ Language included: English</li></ul><p>LANGUAGE ADD-ONS</p><p><input type="checkbox"/> Danish (+7 credits per user) ⓘ</p><p>APPLICATION ADD-ONS (ENGLISH ONLY)</p><p><input checked="" type="checkbox"/> Management (+10 credits per user) ⓘ</p><p><input type="checkbox"/> Agile EQ (+10 credits per user) ⓘ</p></div>	<div><h4>Worksmart</h4><p>+20 CREDITS PER USER +10 CREDITS PER USER</p><p>Worksmart is a short-form, facilitated training and action-planning experience that helps <b>people managers</b> apply DiSC® insights to the challenges they face every day.</p><p>What's included:</p><ul style="list-style-type: none"><li>✓ Action planning tool</li><li>✓ 5 training modules:<ul style="list-style-type: none"><li>Delivering constructive feedback</li><li>Empowering your team</li><li>Navigating change (Coming soon!)</li><li>Managing conflict (Coming soon!)</li><li>Motivating your team (Coming soon!)</li></ul></li></ul></div>

< 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  
☐ On selected date

02/22/2024

10:00 PM

Send reminder email:

- ☒ Never  
☐ If not completed by

02/22/2024

10:00 PM

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

## Summary

Current EPIC credits: 180  
Spending credits: 125  
Remaining credit: 55

### Learners

EDIT 

Total: 25  
Groups connected: Marketing team, Product Development  
Style:  Revealed

### Content

EDIT 

Product ▾	Learners ▾	Credits ▾
Worksmart	25	500
Add-on: Danish	25	175

### Email options

EDIT 

Send invitation email: 01/01/25 at 10:00 am  
Send reminder email: Never  
Email template language: English

< 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**.

ABC Company  
Current Account

4454 EPIC credits

ABC Company  
Current Organization

2

Learners

Active learners

Archived learners

Generated reports

3

Scheduled invitations

Departments

Groups

Scheduled invitations

(UTC -5:00)

CHANGE SEND DATE/TIME

CHANGE REMINDER DATE/TIME

Select	First name	Last name	Email	Send date	Reminder date
<div>(0/4)</div>					
<input type="checkbox"/>	Learner	Two	ltwo@noemail.com	07/15/24 06:00 AM	07/22/24 06:30 AM
<input type="checkbox"/>	Learner	Four	lfour@noemail.com	07/15/24 06:00 AM	07/22/24 06:30 AM
<input type="checkbox"/>	Learner	Three	lthree@noemail.com	07/15/24 06:00 AM	07/22/24 06:30 AM
<input type="checkbox"/>	Learner	One	lone@noemail.com	07/15/24 06:00 AM	07/22/24 06:30 AM

Page 1 of 1

1

- 4. Click the filter icon to filter by Groups.

Scheduled invitations

(UTC -05:00)

CHANGE SEND DATE/TIME

CHANGE REMINDER DATE/TIME

Select	Send date	Reminder date
<div>(0/4)</div>		

Page 1 of 1

1

Filter

GROUPS

Enter group name to search

Group name

Select

Executives

January 2025 Training Cohort Group

Done

## 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**.

ABC Company  
Current Account

4454 EPIC credits

ABC Company  
Current Organization

**2** Learners ^

Active learners

Archived learners

Generated reports

**3** Scheduled invitations

Departments

Groups

### Scheduled invitations

(UTC -5:00) ⓘ

**5** ➤ CHANGE SEND DATE/TIME ➤ CHANGE REMINDER DATE/TIME

Select (0/4)	First name	Last name	Email	Send date	Reminder date
<b>4</b> <input checked="" type="checkbox"/>	Learner	Two	ltwo@noemail.com	07/15/24 06:00 AM	07/22/24 06:30 AM
<input type="checkbox"/>	Learner	Four	lfour@noemail.com	07/15/24 06:00 AM	07/22/24 06:30 AM
<input type="checkbox"/>	Learner	Three	lthree@noemail.com	07/15/24 06:00 AM	07/22/24 06:30 AM
<input type="checkbox"/>	Learner	One	lone@noemail.com	07/15/24 06:00 AM	07/22/24 06:30 AM

Page 1 of 1

1

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

### Change Send Date

04/17/2022 03:30 PM **6**

First name	Last name	Email	Send date
Learner	Two	ltwo@noemail.com	07/15/24 06:00 AM

Cancel **7** 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**.

**Scheduled invitations** (UTC -5:00) ⓘ

➤ CHANGE SEND DATE/TIME **5** ➤ CHANGE REMINDER DATE/TIME

Select	First name	Last name	Email	Send date	Reminder date
(1/4)					
<input checked="" type="checkbox"/>	Learner	Two	ltwo@noemail.com	07/15/24 06:00 AM	07/22/24 06:30 AM
<input type="checkbox"/>	Learner	Four	lfour@noemail.com	07/15/24 06:00 AM	07/22/24 06:30 AM
<input type="checkbox"/>	Learner	Three	lthree@noemail.com	07/15/24 06:00 AM	07/22/24 06:30 AM
<input type="checkbox"/>	Learner	One	lone@noemail.com	07/15/24 06:00 AM	07/22/24 06:30 AM

Page 1 of 1

1

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

### Change Send Date

04/17/2022 03:30 PM **6**

First name	Last name	Email	Send date
Learner	Two	ltwo@noemail.com	07/15/24 06:00 AM

Cancel **7** 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.

The screenshot shows the 'Learners' section of a software interface. At the top, there is a search bar with the placeholder text 'Search by either name or email address'. A red circle with the number '2' is placed over the search bar. Below the search bar, a dropdown menu is open, displaying two search results: 'Learner Three (lthree@noemail.com)' and 'Learner Two (ltwo@noemail.com)'. A red circle with the number '3' is placed over the first result. To the right of the search bar are two buttons: '+ Add' and 'Import'. Below the search bar and dropdown, there is a light blue notification bar with the text 'Catalyst will check for existing learners on Catalyst and will not duplicate assignment.' and a close button 'x'. At the bottom of the interface, there is a row of buttons: 'Filter', 'GENERATE REPORTS', 'SEND REMINDER EMAIL', and 'UNLOCK CONTENT'.

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**.

This screenshot shows the same 'Learners' interface as the previous one, but with the search bar closed. The red circle with the number '2' is now placed over the 'Filter' button at the bottom left of the interface. The search bar still contains the placeholder text 'Search by either name or email address'. The '+ Add' and 'Import' buttons are still present to the right of the search bar. The light blue notification bar is still visible. The row of buttons at the bottom remains the same: 'Filter', 'GENERATE REPORTS', 'SEND REMINDER EMAIL', and 'UNLOCK CONTENT'.



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**.

×

Filter learners

ASSESSMENT STATUS ^

☐ Complete

☐ Incomplete

STYLE STATUS ^

☐ Revealed

☐ Hidden

PRODUCT CONTENT ^

Locked

Unlocked

☐

☐ Worksmart

☐

☐ Agile EQ

☐

☐ Management

☐

☐ Danish

GROUPS ^

Enter group name to search

Q

DEPARTMENTS ^

Enter department name to search

Q

Clear all

Update

4

## 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**.

Learners

Search by name or email address

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

**3** SEND REMINDER EMAIL UNLOCK CONTENT

Select	First name	Last name	Email	Style
<input checked="" type="checkbox"/>	Ahmad	Babbage	ababbage@noemail.com	Incomplete
<input checked="" type="checkbox"/>	Frank	Beaseley	frank@noemail.com	Incomplete
<input checked="" type="checkbox"/>	Mercy	Bryant	bryant@noemail.com	Incomplete
<b>2</b> <input checked="" type="checkbox"/>	Henry	Cornelius	hcorneilius@noemail.com	Incomplete
<input checked="" type="checkbox"/>	Abigail	Deaver	adeaver@noemail.com	Incomplete
<input checked="" type="checkbox"/>	Marianna	Jennings	mjennings@noemail.com	Incomplete
<input checked="" type="checkbox"/>	David	Langford	dlangford@noemail.com	Incomplete
<input checked="" type="checkbox"/>	Ruby	Law	rlaw@noemail.com	Incomplete

4. Optionally, enter a custom message.
5. Click **Send Reminder**.

Send Reminder

Only learners who have not completed the assessment will receive a reminder email.

**4** Custom message

0/2000

**5**

## 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**.

The screenshot shows the Catalyst interface. On the left, a sidebar lists 'Catalyst Demo' with 75 EPIC credits, 'Practitioner resources', and 'KRT Industries' as the current organization. Under 'KRT Industries', 'Learners' is selected. The main area is titled 'Learners' and includes a search bar, '+ Add' and 'Import' buttons, and a notification: 'Catalyst will check for existing learners and will not duplicate an existing assignment.' Below this is a table of learners with columns for 'Select', 'First name', 'Last name', and 'Email'. Three learners are listed: Rahim Abadi, Elena Ali, and Stephanie Choi, all with checkboxes selected. Above the table are buttons for 'SEND REMINDER EMAIL' and 'UNLOCK CONTENT'. A red circle '2' points to the 'Select' column. A red circle '3' points to the three-dot menu above the table. A red circle '4' points to the 'Generate reports' option in the dropdown menu that appears when the menu is clicked.

Select	First name	Last name	Email
<input checked="" type="checkbox"/>	Rahim	Abadi	rabadi@inscapepublishing.com
<input checked="" type="checkbox"/>	Elena	Ali	eali@inscapepublishing.com
<input checked="" type="checkbox"/>	Stephanie	Choi	schoi@inscapepublishing.com

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

Catalyst™ profile report

5

☒ Workplace☐ Management☐ Agile EQ☐ Supplement for Facilitator report

Learner list

Enter name or email

Name	Email	Remove from report list
Terri Wilson	twilson@inscapepublishing.com	✗
Stephanie Choi	schoi@inscapepublishing.com	✗
Sara Dalton	sdalton@noemail.com	✗
Rahim Abadi	rabadi@inscapepublishing.com	✗
Mateo Vega	mateo@everythingdisc.com	✗
Marge Davies	jdavies@inscapepublishing.com	✗
Lucas de Lugo	ldelugo@inscapepublishing.com	✗
Isla Lewis	ilewis@inscapepublishing.com	✗
Ida Sample	ahansen@inscapepublishing.com	✗

6

Add to batch

Cancel

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	<div>Waiting</div>	- MB	11/19/2024	<div></div>


Page 1 of 1


1


- 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.


**Catalyst Demo**  
Current account


75 EPIC credits

**Practitioner resources**

**KRT Industries**  
Current organization



Learners

Departments

Groups

## Generated reports



Generating reports may take a few minutes. When complete, click the arrow to download each batch. You will find the reports in the downloads folder of your browser.

Report	Generation status	Size	Expires	Download
Report batch #398778	 Report generation complete	10 MB	7/24/2025	 <b>7</b>

Page 1 of 1

1

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

-  **Report generation complete**  
4 items out of 10 failed to generate
-  **Report generation failed**

## Individual Learner

- From the *Organizations* page, click the organization name.
- Enter the learner's name or email to search for their record.
- Click the learner's name from the list.
- Click **Assessment Info**.
- Click **Download Profile**. The file will automatically download to your computer.

LEARNER INFO

**ASSESSMENT INFO** **4**

### History

ASSESSMENT COMPLETED

Download Profile Report **5**

Unlocked Catalyst Content

< Back

## 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.

### Reveal styles

Once learners have completed the assessment and you reveal their styles, they will remain visible; you cannot hide them again



Are you sure you want to reveal the selected learners' styles?

Cancel

Reveal styles

5

## 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**.

Catalyst Demo  
Current account

75 EPIC credits

Practitioner resources

KRT Industries  
Current organization

Learners ^

Active learners

Archived learners

Generated reports

LEARNER INFO

ASSESSMENT INFO 4

Click REVEAL STYLE to allow Adolpho to see the DiSC® style.

REVEAL STYLE 5

History

ASSESSMENT COMPLETED

Download profile report

Workplace + Add-ons

Unlock product content

RECOMMENDED

Worksmart

+20 CREDITS PER USER

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

### Reveal style

Once Georgianna has completed the assessment and you reveal their style, it will remain visible; you cannot hide it again.



Are you sure you want to reveal the selected learners' style?

Cancel

Reveal style

6

## 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**.

**Catalyst Demo**  
Current account  
75 EPIC credits

**Practitioner resources**

**KRT Industries**  
Current organization

**Learners**

**Active learners**

Archived learners

Generated reports

Scheduled invitations

Compare learners

**Departments**

**Groups**

### Learners

Search by name or email address

+ Add

Import

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

SEND REMINDER EMAIL

UNLOCK CONTENT

Select	First name	Last name	Email	Style
<input checked="" type="checkbox"/>	Rahim	Abadi	rabadi@inscapepublishing.com	C
<input checked="" type="checkbox"/>	Elena	Ali	eali@inscapepublishing.com	IS
<input checked="" type="checkbox"/>	Stephanie	Choi	schoi@inscapepublishing.com	D
<input type="checkbox"/>	Sara	Dalton	sdalton@noemail.com	C
<input type="checkbox"/>	Marge	Davies	jdavies@inscapepublishing.com	DC
<input type="checkbox"/>	Lucas	de Lugo	ldelugo@inscapepublishing.com	CD
<input type="checkbox"/>	Dave	Haskell	irubio@inscapepublishing.com	I
<input type="checkbox"/>	Isla	Lewis	ilewis@inscapepublishing.com	ID



#### 4. Click **Add learners**.

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

### Select Learners

*Search by name or email address*

① 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: 75

Spending credits: 21

Remaining credits: 54

## Unlock content

### Workplace

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 ⓘ

### Worksmart

~~+20 CREDITS PER USER~~  
+10 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 (Coming soon!)
  - Motivating your team (Coming soon!)

< Back

Cancel

Unlock content

6

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

1 Select Learners — 2 Unlock content — 3 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**.

1 Select Learners

2 Unlock content

3 Email options

4 Summary

Current EPIC credits: 75

Spending credits: 21

Remaining credits: 54

Summary

Learners

EDIT

Total: 3

Connected groups: —

Content

EDIT

Product ^	Learners	Credits
Danish language pack	3	21

Email options

EDIT

Email template language: Danish

Custom message: —

< Back

Cancel

Confirm transaction

8

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.

Learners

Search by either name or email address

+ Add

2

Import

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

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.



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:  🔍

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

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

## Unlock content

### Workplace

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 ⓘ

### Worksmart

~~+20 CREDITS PER USER~~  
+10 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 (Coming soon!)
  - Motivating your team (Coming soon!)

< 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  
☐ On selected date

07/17/2025

03:27 PM

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

ASSESSMENT COMPLETED

DOWNLOAD PROFILE REPORT

Unlocked Catalyst Content

Unlock product content

Recommended

Worksmart

+20 CREDITS PER USER  
+10 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.

✓ Action planning tool

✓ 5 training modules

Delivering constructive feedback

Empowering your team

Navigating change

Managing conflict

Motivating your team

VIEW LESS

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

**6**

Unlock Add-ons

< Back

## 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

4

First Name

Ahmad

Last Name

Babbage

Email

ababbage@noemail.com

Assigned department and groups

Department

Groups

2 groups X

< 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**.

LEARNER INFO

ASSESSMENT INFO

Learner information

Archive learner

First Name

Sharon

Last Name

Moore

Email

sharon@noemail.com

Assigned department and groups

Department

Sales X

3

Groups

< Back

Update learner

4

## 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** or the **Workplace** accordion arrows in the History section to see a list of associated activities.

### History

ASSESSMENT COMPLETED

[DOWNLOAD PROFILE REPORT](#)

Unlocked Catalyst Content

^ 4

Workplace

• 03/03/2025 Completed Workplace assessment

Worksmart

^ 4

Worksmart

• 04/22/2025 Unlocked Worksmart by Simone Tester

### Unlock product content

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**.

LEARNER INFO

ASSESSMENT INFO

Learner information

First Name

Sharon

Last Name

Moore

Email

sharon@noemail.com

Assigned department and groups

Department

Sales X

Groups

< Back

Update learner

Archive learner

4

5. Click **Archive**.

### Archive learner

Archiving a learner will remove them from their Groups, Department and they will no longer be visible to other learners within the Catalyst organization. **This learner will only be able to view their own profile and style information.**



Do you wish to archive this learner?

Cancel

Archive

5

## 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 learners**.

**Catalyst Demo**  
Current account  
75 EPIC credits

**Practitioner resources**

**KRT Industries**  
Current organization

**Learners** ▾

Departments

Groups

### Learners

Search by name or email address

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

SEND REMINDER EMAIL UNLOCK CONTENT

Select	First name	Last name	Email
<input checked="" type="checkbox"/>	Rahim	Abadi	rabadi@inscapepublishing.com
<input checked="" type="checkbox"/>	Elena	Ali	eali@inscapepublishing.com
<input checked="" type="checkbox"/>	Stephanie	Choi	schoi@inscapepublishing.com

- Generate reports
- Reveal style
- Archive learner

5. 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?

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**.

ABC Company  
Current Account

4204 EPIC credits

ABC Company  
Current Organization

2 Learners ^

Active learners

3 Archived learners

Generated reports

Scheduled invitations

Departments

Groups

### Archived learners

Search by either name or email address

Filter

5 REACTIVATE GENERATE REPORTS

Select	First name	Last name	Email	Style
<input checked="" type="checkbox"/>	Matas	Patton	matas@noemail.com	C
<input type="checkbox"/>	demo	atest	demotest021323@noemail.com	C

Page 1 of 1

1

1 out of 2 learners are selected. [Clear all](#)

### 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 learner

Reactivating a learner will make them visible to other learners in the Catalyst organization.  
You will need to add them to a department and groups, if needed.



Do you wish to activate this learner?

Cancel

Activate

5

## 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**.

LEARNER INFO

ASSESSMENT INFO **3**

History

ASSESSMENT INCOMPLETED

Unassign Assessment **4**

Workplace + Add-ons

Unlock product content

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)

☐ Management (+10 credits per user)

☐ Agile EQ (+10 credits per user)

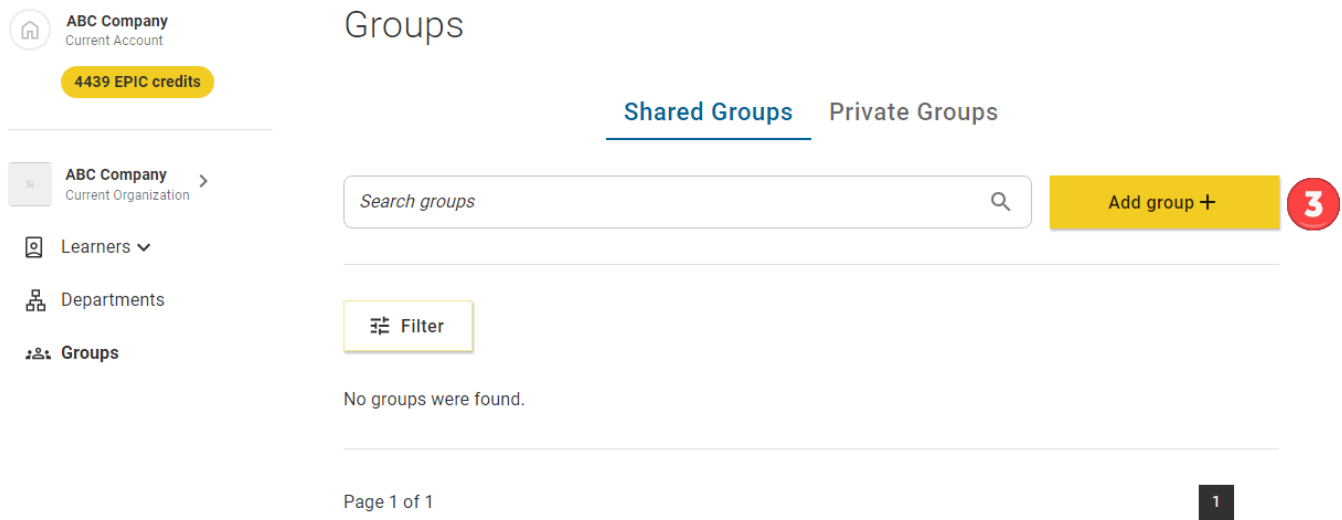
Unlock Add-ons

# Groups

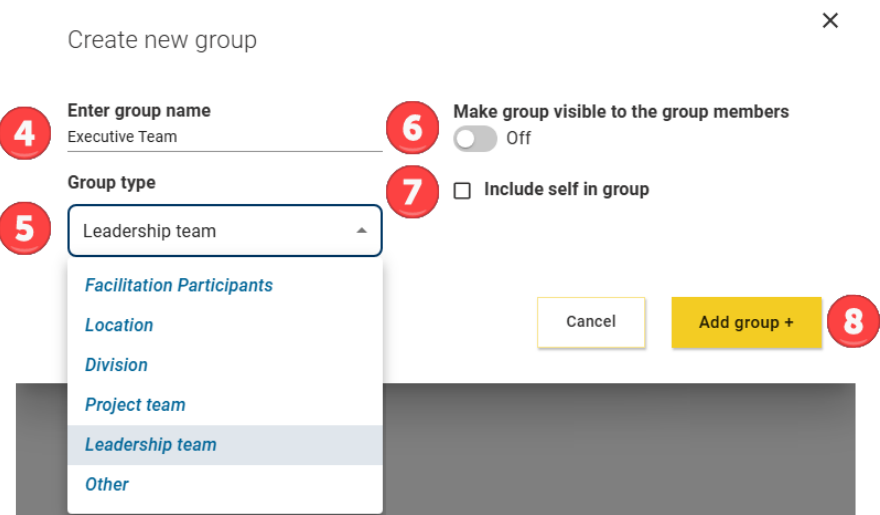
Administrators can create shared groups of learners that allow group members to see each other after completing their assessments. Administrators can also create private groups that are only available in the administrator experience. Private groups allow admins to organize learners for quicker retrieval 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

2

Ida Exuberance (ida@noemail.com)

Name Email Department (Unselect all)

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

Add learners to August 2024 Workplace

Ida Exuberance X

Search

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**.

August 2024 Workplace

Delete Edit

Facilitation Participants

Learners in group

0

Download group map

Download CSV

Search learners within this group



+ Add

1

Import

### 2. Click **Download template**.

Upload group through Excel



2

Download template



Drag & drop files or [Browse](#)

Supported formats: xls, xlsx, CSV

Maximum file size: 5 MB

Please add Email to column A, and Name to column B

Upload file

Back

### 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**.

Upload group through Excel



Download template



4

Drag & drop files or [Browse](#)

Supported formats: xls, xlsx, CSV

Maximum file size: 5 MB

Please add Email to column A, and Name to column B

Upload file

5

Back

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

August 2024 Workplace

Delete

Edit

7

Facilitation Participants

Learners in group3

Download group map

Download CSV

Search learners within this group

+

Add

Import

First name	Last name	Email		Remove from group
Ida	Exuberance	ida@noemail.com		X
Matas	Patton	matas@noemail.com	6	X
Sheridan	Murphy			X

Page 1 of 1

1

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.

Groups

Shared Groups

Private Groups3

Search groups

Q

Add group +

Filter

August 2024 Workplace4

...

Ida Exuberance

Matias Patton

Sheridan Murphy

Page 1 of 1

1

- 5. Click **Download group map**.

August 2024 Workplace

Delete Edit

Facilitation Participants

Learners in group3

5

Download group map

Download CSV

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

[Delete](#) [Edit](#)

Facilitation Participants

Learners in group	3	<a href="#">Download group map</a>
		<div><div>5</div><div>Download CSV</div></div>



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

Q

Add group +

Filter

August 2024 Workplace

Ida Exuberance

Matias Patton

Sheridan Murphy

4

...

5

Edit

Delete

Page 1 of 1

1