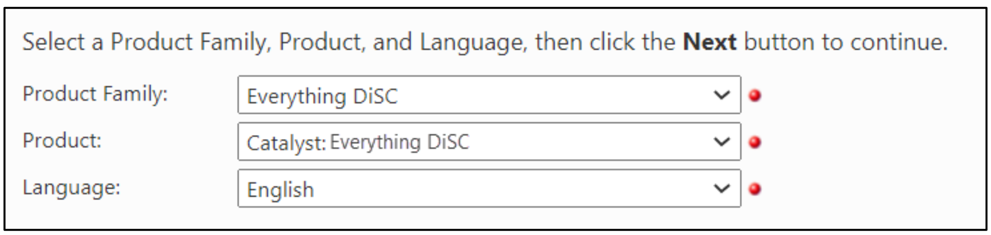
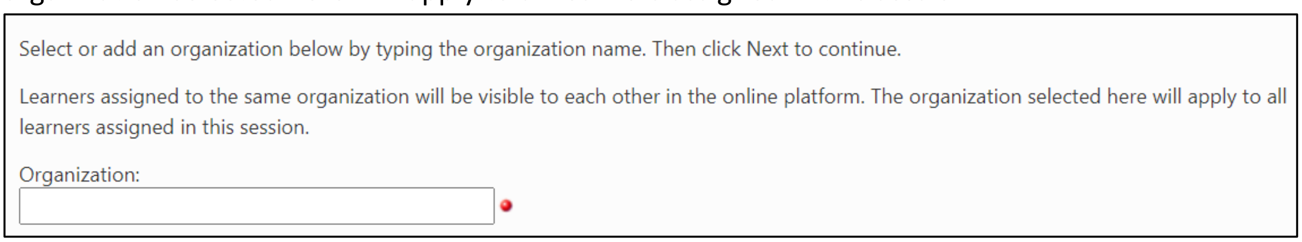
Workplace on Catalyst™ Upgrades in EPIC Admin

Past Everything DiSC and DiSC Classic learners are eligible for a FREE Everything DiSC on Catalyst upgrade. When using existing Everything DiSC data to create a new Everything DiSC 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 Everything DiSC 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**.

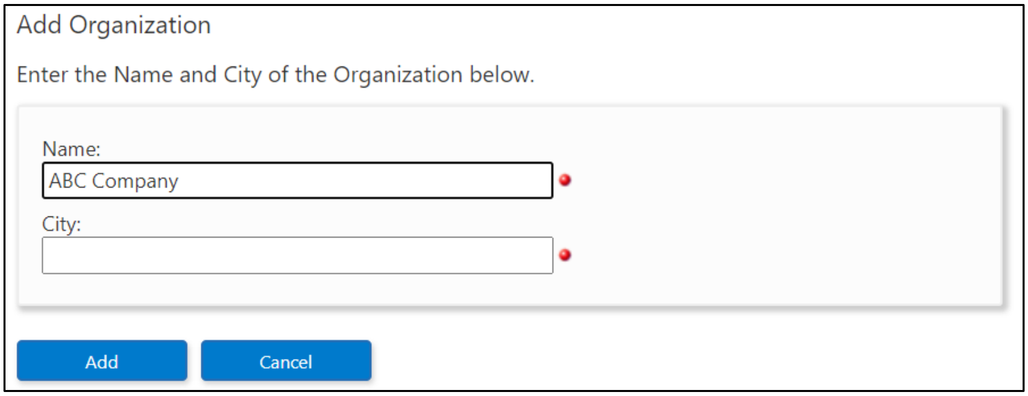


3. Select or add an organization by typing the organization name and click **Next** to continue. Learners assigned to the same organization will be visible to each other in the Catalyst platform. The organization selected here will apply to all learners assigned in this session.

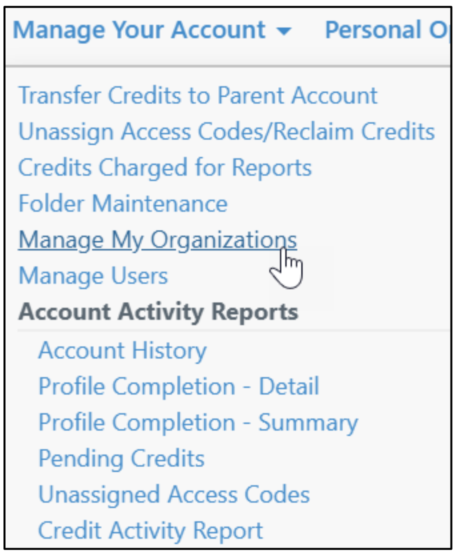


As you begin typing the organization name, organizations that share the same characters appear in the list. If the organization for this set of learners does not appear in the list, just click the **+ Add** option that appears at the top of the list.

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

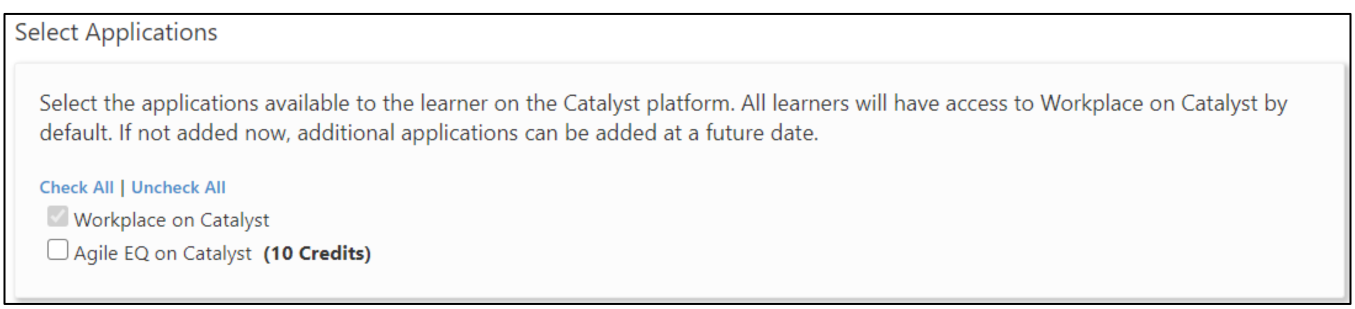


Note: Any organizations that you add can be edited later from the Manage Organizations page.

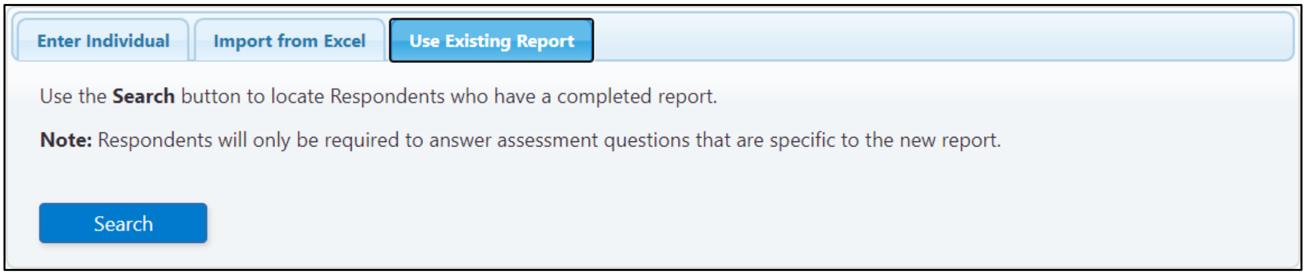


All EPIC primary and sub accounts will see the organization in the dropdown list. When you add an organization, it is visible to all EPIC users that have the Workplace on Catalyst product in their account.

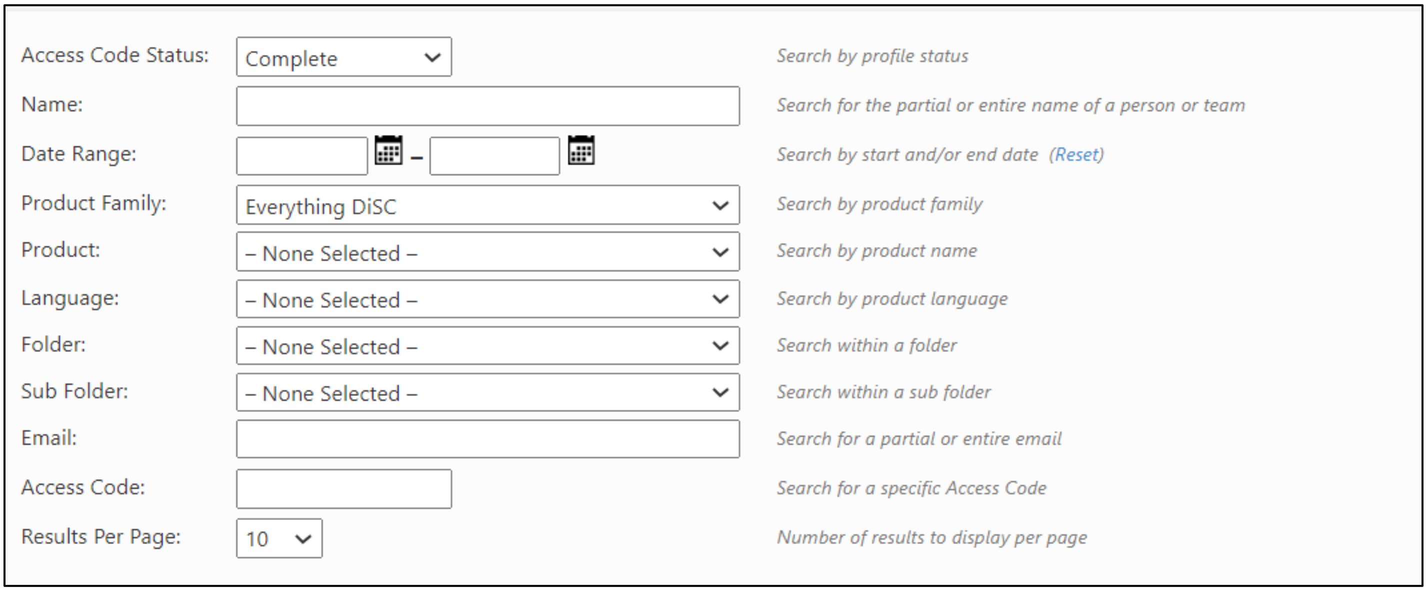
4. Applications: Select the applications available to the learner on the Catalyst platform and click **Next**. All learners will have access to Workplace on Catalyst by default. If not added now, additional applications can be added at a future date.



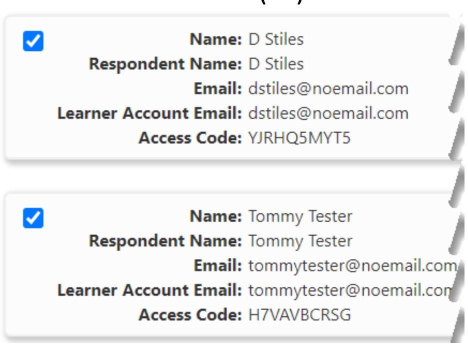
5. Report Details: Choose a folder and/or sub folder in which to create new Access Codes or select the New Folder link to create a new folder.
6. Delivery and Auto Reminder Options: Choose delivery and auto reminder options.
7. Add Respondents: Click the **Use Existing Report** tab and click **Search**.



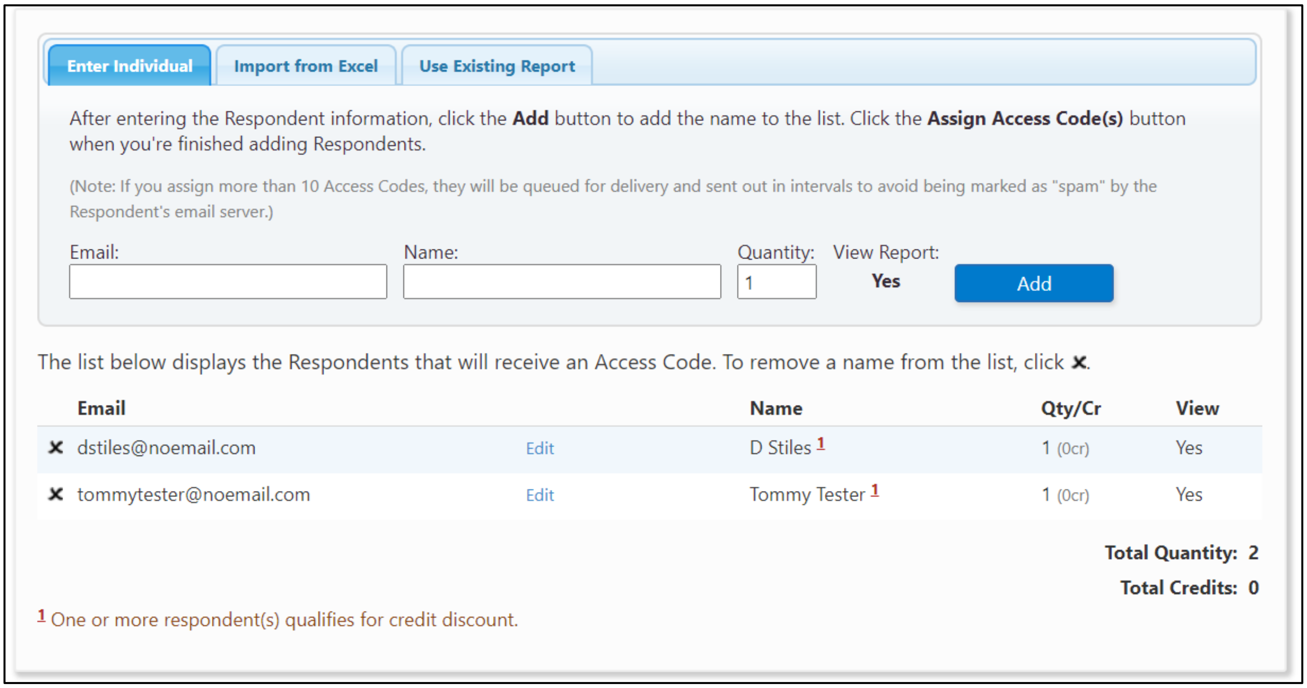
8. Enter your search criteria and click **Search**.



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



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



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

11. Click **Assign Access Codes**.
12. Click **OK** to confirm the credit deduction.
13. 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.