

EPIC: Assigning Catalyst to Existing Workplace

The Catalyst platform houses DiSC Workplace, Agile EQ, and Management. Upgrading existing Workplace reports to Catalyst remains free. Once

Programs/websites needed: EPIC

Assigning Codes in EPIC:

1. Log into EPIC
2. On the left-hand side, drop down the arrow for “Manage Reports.”
3. Click “Create New Report/Issue Access Codes.”
4. In the box under Product Family, select “Everything DiSC.”
5. In the box under Product, select “Catalyst: Everything DiSC.”
6. The language box will automatically change to English.
7. Click NEXT.
8. All participants will need to be assigned an organization. Many organizations are already on the platform, but if one does not automatically come up, you can add it. Also, if you have multiple individuals from different organizations, you need to repeat this process multiple times.
9. Select an organization. Click NEXT.
10. Workplace on Catalyst will be 0 credits for past Workplace users. Adding Agile EQ is an additional 10 credits, if they have not already taken Agile EQ. If they have, upgrading to Agile EQ is also free. The same applies to DiSC Management. Workplace is pre-checked. Check all boxes that apply.
11. Click NEXT.
12. Under “Report Details,” select the correct folder or create a new one. (See EPIC: Assigning and Creating Folders and Sub-Folders.)
13. Select also the correct sub-folder or create a new one. If it makes sense to skip the sub-folder, then skip it.
14. Under “Delivery and Auto Reminder Options,” set “Deliver Email” to immediately, unless you’d like these to go out on a different day.
15. There are three tabs under “Add Respondents.”
 - **Select “Use Existing Report”:** Select all assessments that can be upgraded- Workplace, Agile EQ and Management
16. A small red number 1 will appear after their name, letting you know the individual has special pricing.
17. Check the box to confirm individuals from the selected organization.
18. Once finished adding names, click the bottom button, “Assign Access Codes.”
19. Click SEND.