

Assigning Worksmart to Catalyst Learners

Directions for assigning Everything DiSC® Worksmart to Learners
using the Catalyst Administrator Experience.

Catalyst's newest innovation, Everything DiSC Worksmart, is a research-backed collection of five, one-hour modules that apply DiSC® to common interpersonal challenges faced by today's people managers. By combining DiSC with short-format training and high-impact action plans, Worksmart helps managers master critical skills—all within their daily flow of work. The result is an effective management culture—equipped to improve engagement, productivity, and performance throughout the organization.

*Note: Administrators can only assign Worksmart to learners through the **Catalyst Administrator Experience**; Worksmart is not available in **EPIC**.*



This document explains how to assign Worksmart to:

- **New Catalyst Learners**
- **Existing Catalyst Learners**
- **Past DiSC Learners**

ASSIGN WORKSMART TO NEW CATALYST LEARNERS

1. Log in at <https://catalyst.everythingdisc.com/>.
2. Click **Go to Admin** from the top of the page.
3. If prompted, select an **Account**.
4. Click the appropriate **Organization**.
5. Click **Add** to enter learners' names and email addresses one learner at a time or click **Import** to upload multiple learners from a spreadsheet.
6. Optionally, select an existing group or create a new group for these colleagues by entering a name for the group in *Connect to group* field and clicking **Add group**.
7. Click **Add learners**.

1 Add learners
2 Unlock content
3 Summary
4 Email options

Add learners

Connect to group:

Name	Email	Remove
Shane Forrester	shane@noemail.com	<input type="button" value="X"/>

8. Select **Worksmart**. Note, the base Workplace experience is a requirement for all Catalyst learners, and administrators cannot disable it.
9. Click **Unlock content**.

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

Current EPIC credits: 3096

Spending credits: 25

Remaining credits: 3071

Unlock content

Workplace REQUIRED

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** ⓘ

RECOMMENDED

Worksmart 8 ✓

~~+20 CREDITS PER USER~~
+10 CREDITS PER USER

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What's included:

- ✓ Action planning tool
- ✓ 5 training modules:

- Delivering constructive feedback
- Empowering your team
- Navigating change
- Managing conflict
- Motivating your team

< Back

Cancel

Unlock content

9

10. Click **Confirm content**.

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

Confirm your selection

Connected group: none

Name	Email	Workplace 15 credits	Worksmart 10 credits	Remove
Shane Forrester	shane@noemail.com	+	+	×

< Back

Cancel

Confirm content 10

Current EPIC credits: 3096

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11. Adjust email options and custom messaging, as necessary.
12. Click **Send assessments**. Catalyst sends invitation emails to the learners.

1 Add learners
2 Unlock content
3 Summary
4 Email options

Email options

Scheduling

Send invitation email:

☒ Now
☐ On selected date

04/09/2025
04:19 PM

Send reminder email:

☒ Never
☐ If not completed by

Customize invitation email

Add a custom message

Enter your custom message

0/2000

< Back

Cancel

Send assessments

ASSIGN WORKSMART TO EXISTING CATALYST LEARNERS

1. Log in at <https://catalyst.everythingdisc.com/>.
2. Click **Go to Admin** from the top of the page.
3. If prompted, select an **Account**.
4. Click the appropriate **Organization**.
5. Select one or more learners from the *Active Learners* list. To quickly select all learners that do not have Worksmart enabled, use the filter to find learners that have “Worksmart” content “Locked.”
6. Click **UNLOCK CONTENT**.

Learners

1

6

Select	First name	Last name	Email	Style
<input checked="" type="checkbox"/>	Stella	McGraw	smcgraw@noemail.com	Incomplete
<input checked="" type="checkbox"/>	Emily	Moore	emoore@noemail.com	Incomplete
<i>5</i> <input checked="" type="checkbox"/>	Sheridan	Murphy	smooreadams@gmail.com	Incomplete
<input checked="" type="checkbox"/>	Learner	One	lone@noemail.com	Incomplete
<input checked="" type="checkbox"/>	Matas	Patton	matas@noemail.com	Incomplete

7. Select **Worksmart**.
8. Click **Unlock content**.

1 Unlock content
2 Summary
3 Email options

Unlock content

Workplace

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- ✓ DiSCology
- ✓ Languages included: English

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- ✓ 5 training modules:
 - Delivering constructive feedback
 - Empowering your team
 - Navigating change
 - Managing conflict
 - Motivating your team

Current EPIC credits: 3081

Spending credits: 50

Remaining credits: 3031

Cancel

Unlock content 8

9. Click **Confirm content**.

1 Unlock content
2 **Summary**
3 Email options

Confirm your selection

Connected group: none

Name	Email	Workplace 15 credits	Worksmart 10 credits	Remove
Stella McGraw	smcgraw@noemail.com	✓	+	×
Sheridan Murphy	smooreadams@gmail.com	✓	+	×
Matas Patton	matas@noemail.com	✓	+	×
Learner One	lone@noemail.com	✓	+	×
Emily Moore	emoore@noemail.com	✓	+	×

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Cancel

Confirm content 9

10. Adjust custom messaging, as necessary.
11. Click **Send**. Catalyst sends notifications to the learners.

1 Unlock content

2 Summary

3 Email options

Email options

Customize invitation email

Add a custom message

Enter your custom message 10

0/2000

[< Back](#)

Cancel

Send 11

UPGRADE PAST DISC LEARNERS TO WORKSMART

Upgrade Learners to Catalyst

1. Login at **admin.wiley-epic.com**.
2. Select **Catalyst: Upgrade from Existing Reports** from the *Batch Functions* section of the *Manage Reports* menu.

Access Code Search

3. Select the search criteria.
4. Click **Search**.

OR

Email Address Upload


5. Download and complete the template.
6. Click **Upload** to import the list of names and email addresses. EPIC will find any learners associated with the email addresses and determine which EPIC can upgrade to Catalyst. A limit of 150 emails is set for this feature.



Manage Reports

Batch Functions • Catalyst: Upgrade from Existing Reports • Search Criteria

Search Criteria

Use the search criteria to filter your results.

This Catalyst Upgrade tool is designed to search all existing **learner accounts**. As a result, this tool will not find any assessments assigned before November 8th, 2018 that have not been connected to a learner account. 

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

4

Search

Reset

Or...

Find Learners by email address importing an Excel file.

Click the **Upload** button to upload and import the email address list. The file must be an Excel worksheet (.xls or .xlsx) type file. [Download the import template here.](#)

EPIC will find any Learners associated with the email addresses and determine which can be upgraded to Catalyst. A limit of 150 emails is set for this feature.

6

Upload

5

Select Learners

Once the search or upload is complete, you must decide which access codes EPIC will upgrade and with which Catalyst™ applications. Note that access codes without a learner account will not be migrated.

1. Select access codes by clicking the box to the left of the name or click **Select All** to upgrade everyone in the search results.
2. Click **Next**.

1

☒

Name: Celia Vargas
Respondent Name: Celia Vargas
Email: celia@noemail.com
Learner Account Email: celia@noemail.com
Access Code: USLNDSDUPS

Product: Everything DiSC Agile EQ
Language: English
Account: Wiley WLS
Last Generated:

Assigned: 11/5/2020
Completed: 11/5/2020
Folder:
Sub Folder:

2

☒

Name: Janet Smith
Respondent Name: Janet Smith
Email: janet@noemail.com
Learner Account Email: janet@noemail.com
Access Code: JBACBE84Q6

Product: Everything DiSC Sales Profile
Language: English
Account: Wiley WLS
Last Generated:

Assigned: 11/5/2020
Completed: 11/5/2020
Folder:
Sub Folder:

1

☒

Name: Franklin Duncan
Respondent Name: Franklin Duncan
Email: frank@noemail.com
Learner Account Email: frank@noemail.com
Access Code: CWWML2DCD7

Product: Everything DiSC Workplace Profile
Language: English
Account: Wiley WLS
Last Generated: 10/11/2022

Assigned: 11/5/2020
Completed: 11/5/2020
Folder:
Sub Folder:

2

1

1 2 3 4 5

Next >>

Select All >>

Return to Search Criteria

Upgrade Learners

Learner Account Details

Select an Organization, Folder, and Sub Folder for the access codes.

Learner Account Details

Select an Organization, Folder, and Sub Folder for the Catalyst profiles to be created. **Note:** Required fields are indicated with ●.

Product:	Catalyst: Everything DiSC
Language:	English
Organization:	<input style="width: 90%;" type="text"/>
EPIC Folder:	<div style="border: 1px solid #ccc; padding: 2px;">- None Selected -</div>
EPIC Sub Folder:	<div style="border: 1px solid #ccc; padding: 2px;">- None Selected -</div>

Learners

The *Learners* section of the *Manage Reports* page displays the results of EPIC's calculations to determine the best upgrade choice for your selected learners.

Learners ready to upgrade

1. Use the checkboxes to select or deselect applications. Click the **X** to remove a learner from the list.
2. Select the **organization** confirmation checkbox below the respondent list.
3. Click **Add Reports** to add more people to the Learners ready for upgrade tab by returning to the *Search Criteria* page, where you can perform another search. Note you cannot upload a spreadsheet when you return to the search criteria.
4. Click **Upgrade** when your list of learners is complete.

The learners below will be upgraded to Catalyst. You can add more using the **Add Reports** button, or remove from the existing list by clicking **X**. Click **Upgrade** to complete your action(s).

Email	Name	Workplace	Management	Agile EQ
X frank@noemail.com	Franklin Duncan	<input checked="" type="checkbox"/> 0 credits	<input type="checkbox"/> 10 credits	<input type="checkbox"/> 10 credits
X celia@noemail.com	Celia Vargas	<input checked="" type="checkbox"/> 0 credits	<input type="checkbox"/> 10 credits	<input checked="" type="checkbox"/> 0 credits

1

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

2

4 Upgrade **3** Add Reports

Learners 2
Total Credits: 0

Learners already using Catalyst

If you selected access codes that already belong to Catalyst learners, the learners will appear on this tab. This will let you know why EPIC did add the learners to the Learners ready to upgrade tab. Click **Download emails** before you click the Upgrade button to generate a list of the learners that already have access to Catalyst™.

Learners Not Eligible

This tab appears if you searched for learners using an import file and EPIC could not find an email address, or a learner's completed assessment type is not eligible for Catalyst™ upgrades. Click **Download emails** before you click the Upgrade button to generate a list of the ineligible learners.

After you click the Upgrade button, EPIC begins working to create the Catalyst access codes and send invitation emails to the learners. But this is not an instantaneous process for a large number of learners. Processing time increases with more learners and batches.

Assign Worksmart to Learners

Once the batch has processed, the learners appear in Catalyst, and you can assign the learners Worksmart.

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4. Click the appropriate **Organization**.
5. Select one or more learners from the Active Learners list. To quickly select all learners that do not have Worksmart enabled, use the filter to find learners that have “Worksmart” content “Locked.”
6. Click **Unlock Content**.

Learners

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

Select	First name	Last name	Email	Style
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<input checked="" type="checkbox"/>	Emily	Moore	emoore@noemail.com	Incomplete
<input checked="" type="checkbox"/>	Sheridan	Murphy	smooreadams@gmail.com	Incomplete
<input checked="" type="checkbox"/>	Learner	One	lone@noemail.com	Incomplete
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7. Select **Worksmart**.
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Connected group: none

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0/2000

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