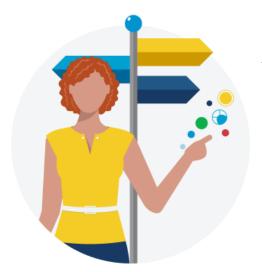


# **Assigning Worksmart to Catalyst Learners**

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 though the <u>Catalyst Administrator</u> <u>Experience</u>; Worksmart is not available in <u>EPIC</u>.



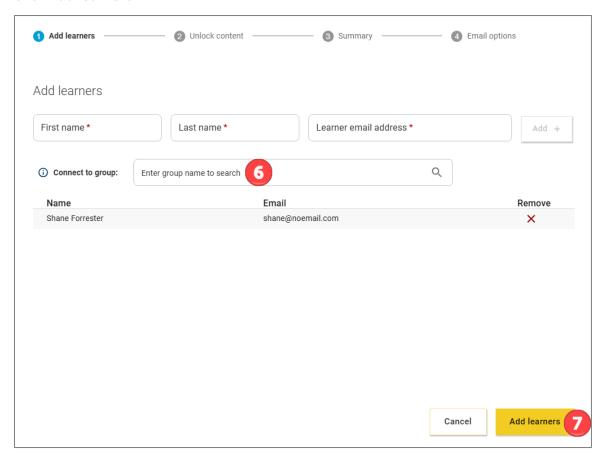
This document explains how to assign Worksmart to:

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



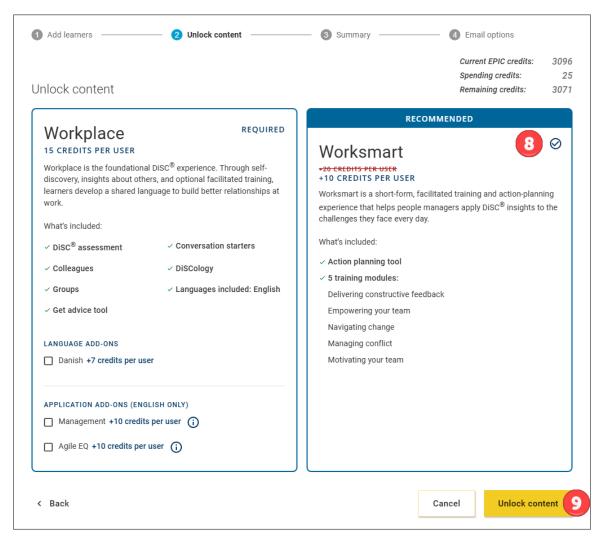
# ASSIGN WORKSMART TO NEW CATALYST LEARNERS

- 1. Log in at <a href="https://catalyst.everythingdisc.com/">https://catalyst.everythingdisc.com/</a>.
- 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.



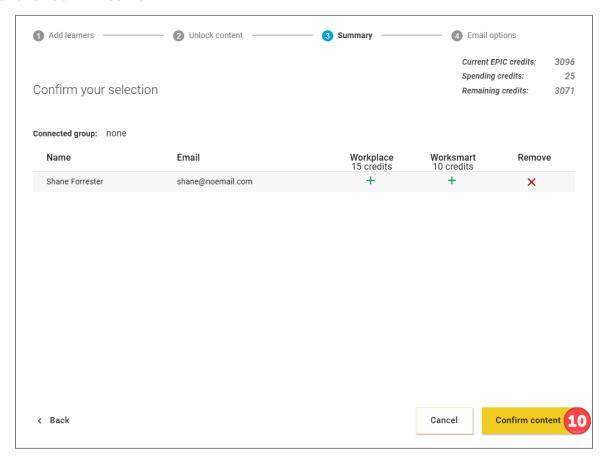


- 8. Select **Worksmart**. Note, the base Workplace experience is a requirement for all Catalyst learners, and administrators cannot disable it.
- 9. Click Unlock content.



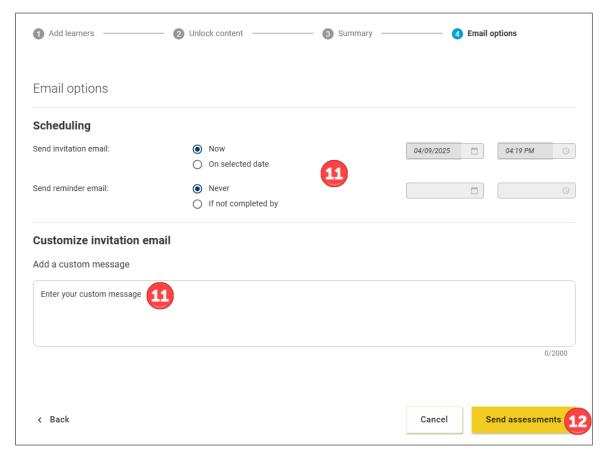


# 10. Click Confirm content.





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

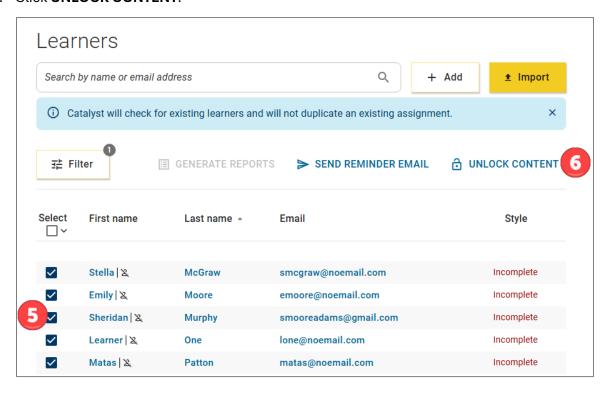




# ASSIGN WORKSMART TO EXISTING CATALYST LEARNERS

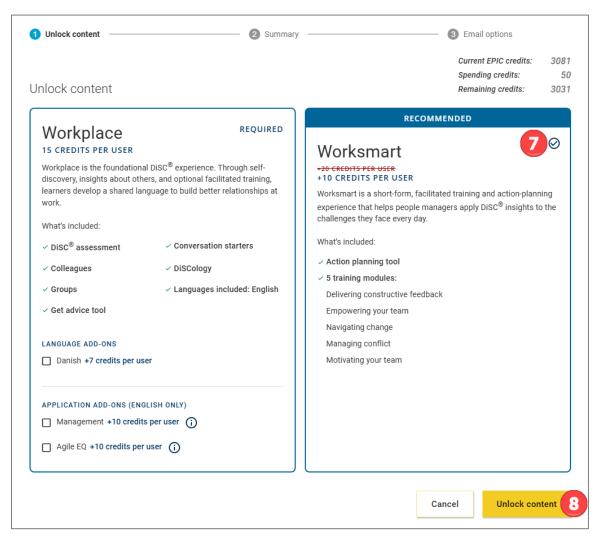
- 1. Log in at <a href="https://catalyst.everythingdisc.com/">https://catalyst.everythingdisc.com/</a>.
- 2. Click **Go to Admin** from the top of the page.
- 3. If prompted, select an Account.
- 4. Click the appropriate **Organization**.
- 5. Select one or more learners from the *Active Learners* list. 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.



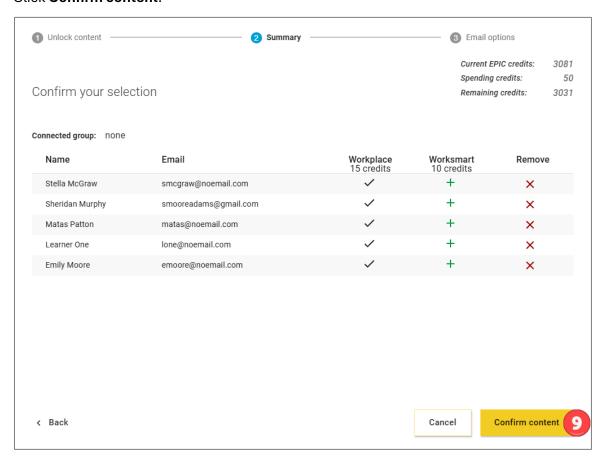


- 7. Select Worksmart.
- 8. Click Unlock content.



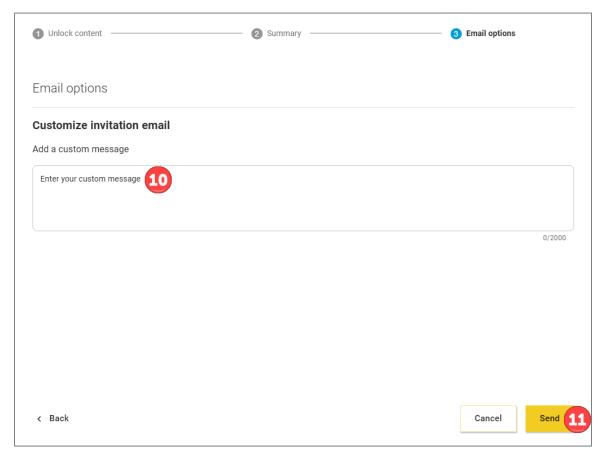


## 9. Click Confirm content.





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





# **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.

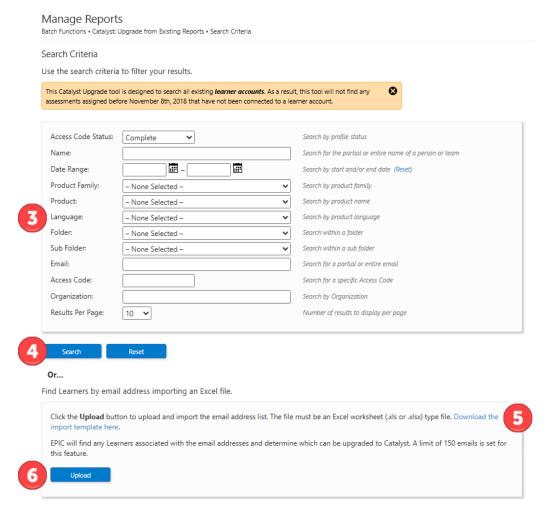
## Access Code Search

- 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.

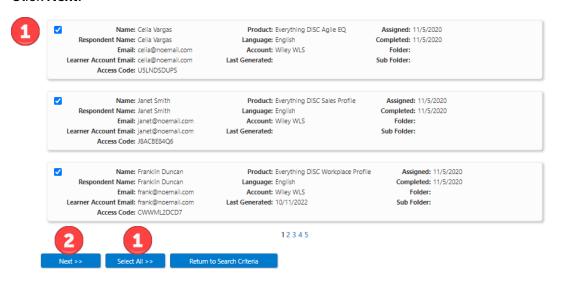




#### Select Learners

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.

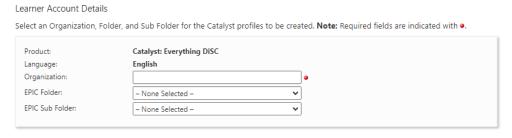
- 1. Select access codes by clicking the box to the left of the name or click **Select All** to upgrade everyone in the search results.
- 2. Click Next.



# **Upgrade Learners**

# Learner Account Details

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



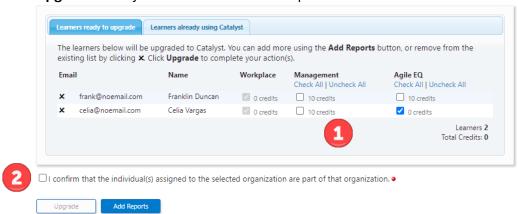


#### Learners

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

- 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 <u>Learners ready for upgrade</u> tab by returning to the <u>Search Criteria</u> 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.



## 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 <u>Learners ready</u> to <u>upgrade</u> tab. Click **Download emails** before you click the Upgrade button to generate a list of the learners that already have access to Catalyst $^{\mathsf{m}}$ .

#### **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.

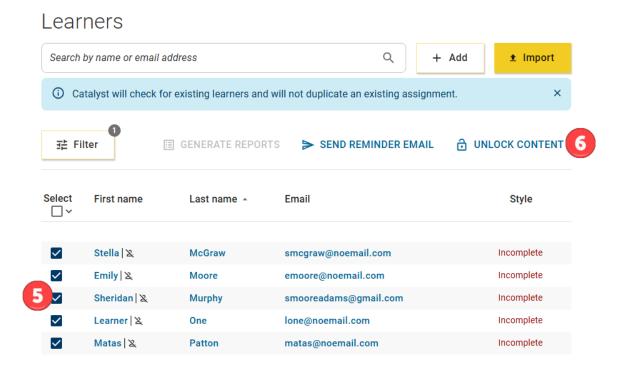
After you click the Upgrade button, EPIC begins working to create the Catalyst access codes and send invitation emails to the learners. But this is not an instantaneous process for a large number of learners. Processing time increases with more learners and batches.



# **Assign Worksmart to Learners**

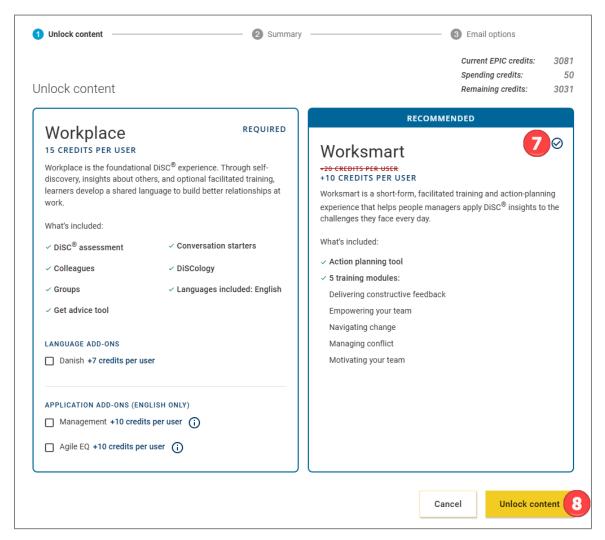
Once the batch has processed, the learners appear in Catalyst, and you can assign the learners Worksmart.

- 1. Log in at <a href="https://catalyst.everythingdisc.com/">https://catalyst.everythingdisc.com/</a>.
- 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.



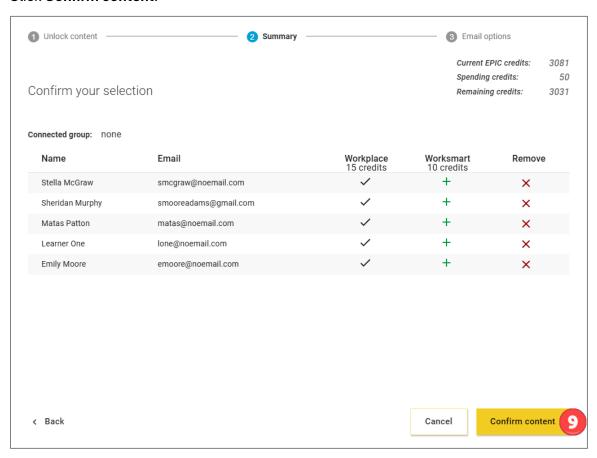


- 7. Select Worksmart.
- 8. Click Unlock content.





## 9. Click Confirm content.





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

