

Everything DiSC[®] on Catalyst[™] Bulk Upgrades

in EPIC

EPIC Admin users can now upgrade up to 150 existing respondents to Catalyst[™] using the new file upload feature on the *Use Existing Report* tab when creating Catalyst access codes.

Download Import Template

Before using the new feature, users must first download and complete the template.

1. Select **Download Import Templates** from the *Manage Reports* menu.
2. Click **Download** to the right of “Catalyst Use Existing Data Templates” and save the template to your PC.

Manage Reports
Download Import Templates

Download File ?

Select the language for the import template and click **Download** to download the file.

Respondent Templates:	English	Download
Rater Templates:	English	Download
Catalyst Use Existing Data Templates:	English	Download

3. Enter up to 150 names and emails of respondents that qualify or might qualify for an upgrade. Then save the file.

Import Respondents to Upgrade to Catalyst

Once you have created your file, you can import it – allowing EPIC to do all the work of finding the appropriate access code.

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**.

Select a Product Family, Product, and Language, then click the **Next** button to continue.

Product Family:	Everything DiSC	•
Product:	Catalyst: Everything DiSC	•
Language:	English	•

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.

Select or add an organization below by typing the organization name. Then click Next to continue.

Learners assigned to the same organization will be visible to each other in the online platform. The organization selected here will apply to all learners assigned in this session.

Organization:

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, click the **+ Add** option at the top.

Organization:

- + Add "ABC C"...
- ABC (Always Being Creative) Graphic Designs Greensboro
- ABC Armstrong and Bonauer Consulting GmbH Lengnau 

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

Add Organization

Enter the Name and City of the Organization below.

Name:

City:

Add **Cancel**

Note: Any organizations added can be edited later from the Manage Organizations page.

Manage Your Account ▾ Personal O

- Transfer Credits to Parent Account
- Unassign Access Codes/Reclaim Credits
- Credits Charged for Reports
- Folder Maintenance
- Manage My Organizations
- Manage Users
- Account Activity Reports**
- Account History
- Profile Completion - Detail
- Profile Completion - Summary
- Pending Credits
- Unassigned Access Codes
- Credit Activity Report

All EPIC primary and sub accounts will see the organization in the dropdown list. When adding an organization, it is visible to all EPIC users with the Everything DiSC® 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.

Select Applications

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

[Check All](#) | [Uncheck All](#)

Workplace on Catalyst

Management on Catalyst (10 Credits)

Agile EQ on Catalyst (10 Credits)

5. **Report Details:** Choose a folder or a subfolder 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. Click the **Upload** button to upload and import up to 150 respondents.

Add Respondents ?

Enter Individual
Import from Excel
Use Existing Report

Use the **Search** button to locate Respondents who have a completed report.

Note: Respondents will only be required to answer assessment questions that are specific to the new report.

Search

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

EPIC will check to see if the Respondents have completed reports. If a completed report is found, the Respondent's previous DiSC style scores will be used in the new report, and only the report-specific questions will be asked. A limit of 150 Respondents is set for this feature.

Upload

EPIC will check to see if the respondents have completed reports, and if a completed report is found, the respondent's previous DiSC style scores will be used in the new report. The existing report's product and completion date are displayed along with applicable discounts. If a completed access code was not found for a respondent, the respondent will still appear on the list but can be removed by clicking the **x**.

Enter Individual
Import from Excel
Use Existing Report

Use the **Search** button to locate Respondents who have a completed report.

Note: Respondents will only be required to answer assessment questions that are specific to the new report.

Search

The list below displays the Respondents that will receive an Access Code. To remove a name from the list, click **X**.

Email	Name	Existing Report Product	Existing Report Qty/Cr Completed	View
X matas@noemail.com	Edit Matas Patton ¹	Everything DiSC Work of Leaders	2021-06-09 1 (0cr)	Yes
X bobby@noemail.com	Edit Bobby Brady ¹	Everything DiSC Management Profile	2021-06-01 1 (0cr)	Yes
X celia@noemail.com	Edit Celia Vargas ¹	Everything DiSC Agile EQ	2020-11-05 1 (0cr)	Yes
X tommytester@noemail.com	Edit Tommy Tester ¹	Everything DiSC Workplace Profile	2019-07-24 1 (0cr)	Yes
X doug@noemail.com	Edit Doug Crawford ²		1 (15cr)	Yes
			Total Quantity: 5	
			Total Credits: 15	

¹ One or more respondent(s) qualifies for credit discount.
² Respondent was on the import file but not found in EPIC

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

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

9. Click **Assign Access Codes**.

10. Click **OK** to confirm the credit deduction.

11. Click **OK** to customize the email to learners or click **Cancel** to send the default email message. The confirmation page summarizes the product, learners, and EPIC credit activity associated with this transaction.

12. Click **Download Respondents** to create a CSV file that contains the details of who was sent a Catalyst access code.

Respondents ?

Show/Hide

Email	Name	View	Status
matas@noemail.com	Matas Patton	Yes	Access Code created and email sent.
bobby@noemail.com	Bobby Brady	Yes	Access Code created and email sent.
celia@noemail.com	Celia Vargas	Yes	Access Code created and email sent.
tommytester@noemail.com	Tommy Tester	Yes	Access Code created and email sent.
doug@noemail.com	Doug Crawford	Yes	Access Code created and email sent.

Summary

Total Access Codes Created:	5
Previous Credit Balance:	6,398
Total Credits Charged:	15
New Credit Balance:	6,383

Create another Report Download Respondent List

	A	B	C	D	E	F	G	H
1	Access Code	Email	Name	Existing Report Product	Existing Report Completed Date	Discount Used	Quantity	Credits
2		matas@noemail.com	Matas Patton	Everything DiSC Work of Leaders	6/9/2021	True	1	0
3		bobby@noemail.com	Bobby Brady	Everything DiSC Management Profile	6/1/2021	True	1	0
4		celia@noemail.com	Celia Vargas	Everything DiSC Agile EQ	11/5/2020	True	1	0
5		tommytester@noemail.com	Tommy Tester	Everything DiSC Workplace Profile	7/24/2019	True	1	0
6		doug@noemail.com	Doug Crawford			False	1	15