Catalyst™ Upgrade Tool

Launching December 4, 2023

PROBLEM

Past Everything DiSC® and DiSC® Classic learners are eligible for a FREE Workplace on Catalyst™ upgrade. In addition, Everything DiSC® Management learners can receive the Management on Catalyst application at no charge. Likewise, the same is true for Everything DiSC® Agile EQ™ learners upgrading to Agile EQ on Catalyst. The upgrade process takes place in EPIC.

However, EPIC users have expressed frustration in migrating mass numbers of existing learners to Catalyst. It's cumbersome in EPIC to determine which of a learner's access codes (aka assessments) to select for the greatest savings. Because over the years, a learner might have taken multiple assessments for different DiSC products – Workplace, Agile EQ, Productive Conflict, Management, etc. The goal of this new migration tool is to solve most (if not all) administrator pain points.

Solution

Our solution to this issue is to create a new page in EPIC that will allow administrators to search and select a group of access codes in their EPIC account, and then let the software identify which learners associated with these assessments do not have access to Catalyst. That solves the major pain point of how to identify who does or doesn't have access to Catalyst. Once EPIC identifies these learners, the admin can then quickly assign Catalyst assessments to them all at the same time.

HOW IT WORKS

1. Select **Catalyst: Upgrade from Existing Reports** from the Batch Functions section of the *Manage Reports* menu.

Identify Learners

The first step is to identify the DiSC learners you want to upgrade to Catalyst. There are two options for identifying learners: search and upload. Either method will result in a list of access codes that are eligible for a free upgrade to Catalyst.

Access Code Search
2. Select the search criteria.
3. Click **Search.**

OR

Email Address Upload
4. Download and complete the template.
5. Click **Upload** to import the list of names and email addresses. 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.

Select Learners

Once the search or upload is complete, you must decide which access codes are getting upgraded 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 Catalyst access codes to be created.

Learners

This section of the *Manage Reports* page displays the results of EPIC's calculations to determine the best upgrade option 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 <u>Learners ready for upgrade</u> 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.

Learners already using Catalyst™

If access codes that already belong to learners were selected in the previous "Select Learners" step, the learners will appear on this tab. This will let you know why learners were not added to the <u>Learners ready to upgrade</u> tab.

Click **Download emails** 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 an email address was not found, or
- A learner's completed assessment type is not eligible for Catalyst™ upgrades

Click **Download emails** to generate a list of the ineligible learners.

Sit Back & Relax

After you click the Upgrade button, EPIC begins working to create the Catalyst access codes and send invitation emails to the learners. But this isn't an instantaneous process for a large number of learners.

The more learners and the more batches being processed at the same time, the longer the process will take.

Batch Process Page

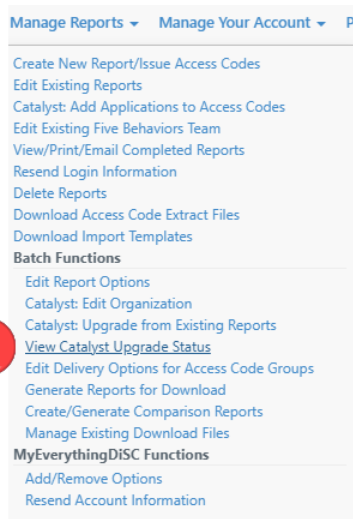There will be a page in EPIC that shows the status of the upgrade process. This page will help confirm that the batch of access codes was successfully requested, and you can status of the process (i.e. "10 of 200 access codes are processed").

1. Select **View Catalyst Upgrade Status** from the Batch Functions section of the *Manage Reports* menu.

2. The *View Catalyst Upgrade Status* page displays all Catalyst upgrade batches created within the last 14 days, and the page automatically refreshes every minute.
3. A status icon to the left of each batch in the list indicates the batch's status.
   a. **Hourglass**: Batch is queued.
   b. **Green Check**: Batch completed successfully.
   c. **Orange Warning**: At least one, but not all, learners had errors in the upgrade process.
   d. **Red Warning**: All learners had errors.
4. Each batch can be expanded to display the learners, applications chosen, and status on the subsequent rows. Pending batches will default to expanded, otherwise collapsed. The page remembers which batches are expanded and collapsed so that when the page automatically refreshes, their states remain the same.
5. Show All and Collapse All links at the top of the list allow you to quickly expand all batches or collapse all batches.

Manage Reports
Batch Functions • View Catalyst Upgrade Status

Catalyst Upgrade Status

Showing batch upgrades from the last 14 days. This page will automatically refresh.

Show All | Hide All

✓ Batch completed 10/13/2023 12:03 PM (1)

1. When a batch is expanded, the organization, folder, subfolder, and learner count are displayed in the last row.

Email

When all the learners in the batch have been assigned a Catalyst™ access code, an email will be sent to the email addresses set up to receive EPIC system notifications. These email addresses are managed by navigating to Personal Options > View/Edit Account Information > EPIC Settings > Email EPIC System Notifications.

From: EPIC <noreply@wileydisc.com>
Sent: Friday, October 13, 2023 12:03 PM
To: Your Name <youremail@noemail.com>;
Subject: Your learners have been upgraded to Catalyst!

Congratulations! Your request from 10/13/2023 12:03:13 PM is completed and your learners have successfully been upgraded to Catalyst.

Created: 10/13/2023 12:03:13 PM

Completed: 10/13/2023 12:53:09 PM

Learner Count: 100