Technical and Troubleshooting Guide for Everything DiSC Workplace® on Catalyst™

Everything DiSC Workplace® on Catalyst™ takes the best-selling *Everything DiSC Workplace* experience to a new level. Designed to engage every individual—regardless of title or function—in building more effective relationships at work, *Workplace on Catalyst* helps people adapt to others in real time, unlocking engagement and inspiring more effective collaboration.

By combining the proprietary Everything DiSC® assessment, the all-new Catalyst platform, and virtual facilitation, learners will…

- Discover their DiSC® style for deepened self-understanding
- Gain insight into and appreciation for other work styles
- Learn how to adapt to others to help build better relationships
- Access real-time tips for more effective interactions with their colleagues
- Build the foundation for future social and emotional skills training—personalized to their DiSC style!

The result is a more engaged, collaborative culture that improves the overall quality of your workplace.

BEFORE YOU GET STARTED

This document is designed to assist EPIC administrators and/or facilitators with the Catalyst platform. If you need further assistance, please contact your Authorized Partner.

To set yourself up for success and ensure that learners receive assessment and EPIC admin emails for *Workplace on Catalyst,* we recommend the organization whitelists Wiley email addresses. For more information, review the Email Troubleshooting document here: https://admin.wiley-epic.com/help/en/docs/EPIC_Email_Troubleshooting.pdf

For the Best Experience on Catalyst

To maximize the full potential of the Catalyst platform and its features, we recommend you encourage your learners to do the following:

- **Favorite the Catalyst platform** – this way they can easily return to the platform to dig in deeper or learn more about how to work effectively with their colleagues
- **Add a picture to their account** – this will help colleagues recognize and find one another
- **Indicate their department within their organization** – this feature helps to filter and sort colleagues within the People feature on Catalyst; it assists with finding relevant colleagues

Browsers We Support

- The latest version of **Chrome**
- The latest version of **Microsoft Edge** for Windows
- **Safari** version 10 or later

BASIC TROUBLESHOOTING TIPS

If at any point learners report difficulty completing the assessment, accessing the platform, using features within the platform, or if something just doesn't look right, we recommend they try these things first to resolve the issue:

- Our recommended browser is Google Chrome; switching to Chrome or a different browser such as Microsoft Edge, Safari, or Mozilla Firefox may resolve the issue. We advise against Internet Explorer.
- Log out of the platform and log back in.
- Close the entire browser and reopen a new session.
- Clear the cache.
- Adjust the screen size or resize screen for desktop.
- If experiencing difficulties accessing the platform on a mobile device, switch to a desktop or laptop if available.
- Ensure the browser's zoom setting is 100% or less

The Assessment

1. **I can't move forward in the assessment; there is nowhere to click to progress.**

   This is often related to the size of the screen. Try the following:

   - Adjust your screen size.
   - If that doesn't work, we recommend switching to one of our supported browsers (Chrome, Microsoft Edge, or Safari).

2. **I took the assessment for Catalyst™ and my style was different than the last time (or previous times) I took it.**

   DiSC® styles can change from one assessment to the next for a number of reasons, including life changes, job changes, or taking the assessment in a completely different environment (i.e., stressed, tired, etc.). Even over a very short period of time, a small but not insignificant percentage of people can see change in results not because their personality has changed but because of factors like mood or simply interpreting the questions differently than they did on the original assessment. On average, we see a 12-degree shift in someone's dot placement when they take the assessment a second time. Because the Everything DiSC® style can shift between two assessments, we highly encourage the "use existing report" feature when issuing access codes.

Following this process ensures that the DiSC style stays exactly the same from one assessment to the next. For information on how to use this feature in EPIC, see question 26.

Everything DiSC® is a highly validated and reliable assessment. To ensure the stability of the assessment, we used test-retest reliability across a large sample. It's important to remember that it is almost impossible to obtain perfect test-retest reliability for any sophisticated psychological test, DiSC® included. That being said, stability is measured by how closely correlated those test-retest scores are; correlations range from 0 to +1. The closer the correlation coefficient score is to +1, the more stable the tool is. Researchers tend to deem correlation coefficients above .70 as acceptable and coefficients above .80 as very good. The correlation coefficient on all eight DiSC scales is .85 or above. You can find more information about reliability in the *Everything DiSC Research Report* or the *Everything DiSC Manual*.

3. **I've already taken an Everything DiSC assessment, so why was I forced to take the whole assessment again?**

    There are a few reasons why a learner may have taken the entire assessment:

    - Existing data was not used when the *Workplace on Catalyst™* access code was assigned.
    - The assessment the learner previously completed was taken prior to 2012 when adaptive testing was introduced.

4. **Why am I being asked all these questions about conflict, emotional intelligence, or management when my content is not related to those topics?**

    The future vision of Everything DiSC on Catalyst transitions the learning experience from a once-and-done event to a return-and-learn, ongoing process. Making that transition requires we remove barriers that currently stand in the way of learners continuing their DiSC journey after that initial experience. One of those barriers is asking a learner to take an additional assessment each time a new experience is offered.

    The *Workplace on Catalyst* assessment integrates questions from *Everything DiSC Agile EQ™, Everything DiSC Management,* and *Everything DiSC Productive Conflict* right away at the beginning of the learner's DiSC journey. As a result, learners will not have to take a new assessment when they are given access to future Everything DiSC content on Catalyst (when additional content becomes available), greatly reducing complexity in their DiSC journey.

Catalyst™ Account Creation

5.   It says I already have a learner account, but I don't remember my password.

Reset your password by clicking "Forgot password?" If you don't receive your password reset email, see question 7.
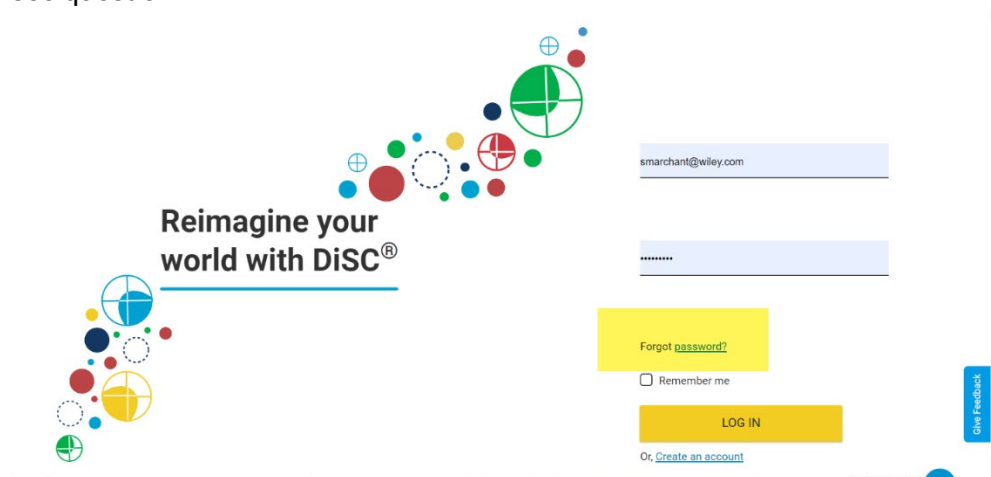
6. What are the password requirements?

Your password must be:
- 8-30 characters

And must include 3 of these:
- Uppercase character
- Lowercase character
- Number
- Special character: ~!@#$%^&*()-_+{}|[]\:;"'?,./

Don't use:
- Spaces
- Your email address

7. I didn't get my password reset email. What do I do?

There are a few things that may be going on.

- Sometimes, emails can get trapped in spam filters. Check your spam or junk folder in your inbox. You can also work with your IT department to make sure you've whitelisted Wiley sites. EPIC administrators can find an email troubleshooting document here: https://admin.wiley-epic.com/help/en/docs/EPIC_Email_Troubleshooting.pdf
- You may not have an existing account. If you entered an email address that is not associated with an Everything DiSC® learner account, you won't receive a reset password email. Try creating an account with that email to confirm whether or not you have an account.

8. **It's prompting me for an access code; where do I find it?**

   Your access code should be in the initial email invitation you received. Copy and paste the access code where prompted, making sure there are no extra spaces.

9. **If I have multiple email addresses, which one should I use?**

   We recommend using the email associated with your organization or the email that you are directed to use by your organization. Remember, the email you choose will be associated with your Catalyst™ account and will be where you receive your password reset emails.

10. **How do learners change or update their email address connected with their Catalyst™ account?**

    Learners can change or update their email address for their Catalyst account by going to "Account Settings" in the menu structure or clicking the avatar or photo image by their name.

The Catalyst™ Platform

11. **I'm trying to log into the platform, but it won't load.**

    If learners are having trouble logging into the platform or getting knocked off, we recommend switching to one of our supported browsers (Chrome, Microsoft Edge, or Safari).

12. **What is the URL of the platform?**

    We would recommend instructing your learners to favorite the platform in their browser. The website URL is https://catalyst.everythingdisc.com/.

The People Section

13. **Am I visible to everybody?**

    No, the Catalyst platform limits information sharing so that only individuals within an organization have access to one another. This feature allows learners to take advantage of the power of DiSC® immediately by finding their colleagues and gaining actionable tips for improved interactions.

    At this time, there is not a feature to allow privacy for a specific individual. If there is a learner who is very uncomfortable with this level of sharing, then *Workplace on Catalyst* might not be the best choice for them.

14. **Can I set it up so that members of certain departments can't see members of other departments?**

At this time, the Catalyst™ platform is set up so all individuals within an organization have access to one another. This enables learners to take advantage of the power of DiSC® immediately by finding their colleagues and gaining actionable tips for improved interactions.

15. **What are filters and how do learners use them?**

Filters can be used in the People section of the Catalyst platform to help learners find others. Learners set their own filters based on who they're looking for or DiSC styles they're interested in learning more about. Learners can also filter by department. Department is filled in individually by each learner. They can create their own or select from departments already entered. Any department entered by a learner will show as an option for future learners in that same organization. For the best experience, we recommend that learners fill in the department information, as well as uploading a photo.

16. **Why can't I see my colleagues?**

There are a few possibilities:

- If a learner is the first person to complete the assessment in their organization, they will not see colleagues in the People section.
- If the learner is in the wrong organization, they may not recognize the people they see. The EPIC admin can change the organization someone is assigned to. See question 23 for instructions on how to change the organization.
- Filters may have been selected. Filters can be cleared by clicking "Reset filters" at the bottom of the filter list.

17. **Can I see people outside of my organization?**

No, you will only see people who are in your same organization and have completed a Catalyst assessment. If you are part of a large organization, this may mean that you see some people who are not familiar to you or whom you've never met before.

18. **I see people but don't recognize their names.**

There are a few things that may be happening here:

- Learners see people depending on the organization they are assigned to. It may be that the organization is very large, and therefore learners don't recognize some colleagues. Learners can filter by department to find people most relevant to them.
- If the learner is in the wrong organization, they may not recognize the people they see. The EPIC admin can change the organization learners are assigned to. See question 23 for instructions on how to change the organization.
- Filters may have been selected. Filters can be cleared by clicking "Reset filters" at the bottom of the filter list.

Account Settings

19. **How do learners add or change their department within their organization?**

Learners can add a department or change the department they are currently in by going to "Account Settings" in the menu structure or clicking the avatar or photo image by their name.

20. **How do learners add or remove a photo?**

Learners can add or remove a photo on their account by going to "Account Settings" in the menu structure or clicking the avatar or photo image by their name.

EPIC Administration of Workplace on Catalyst™

21. **How do you set up people in organizations?**

When you assign access codes in EPIC, you will be required to enter an organization. All people who are assigned to that organization and have completed their assessment will be visible to one another and be able to view one another's styles.

22. **What if the organization isn't listed in the drop-down menu in EPIC?**

You can manually create and add an organization within EPIC. Click the "+Add" option at the top of the drop-down menu after typing in the organization. Please note, once you create an organization, it will be visible globally in EPIC in the organization drop-down menu.

23. **How do I change a learner's organization?**

EPIC administrators are able to change a learner's organization by following the steps below:
1. Go to Manage Reports > Edit Existing Reports
2. Enter the necessary search criteria to find the learner
3. When you locate the learner, click "Edit"
4. Update the "Organization" field

24. I made a typo when I created a new organization; how do I fix it?

To correct a typo in an organization you created, do the following:
1. In EPIC, go to Manage Your Account > Manage My Organizations
2. Next to the organization, click "Edit"
3. This will open a window that allows you to edit the organization's name and city

25. There are multiple organizations with the same name as mine; how do I know which one to select?

EPIC administrators will see the organization's name, city, and logo in the Organization drop-down when assigning a new access code or editing an existing access code. This should help you select the correct company.

Upgrading to Everything DiSC® Workplace on Catalyst™

26. How do I receive the upgrade discount?

Everything DiSC® profiles that qualify for a free upgrade are *Everything DiSC Workplace®* and DiSC® Classic. To ensure you receive the upgrade discount, you must use existing data from one of those two profiles when assigning *Workplace on Catalyst™* access codes. To use existing data, you will need to use the "Use Existing Report" tab when assigning access codes:

27. Why didn't I get my upgrade discount?

There are a few reasons why you may have not received the discount:

- You did not use existing data when assigning the *Workplace on Catalyst™* access code (see question 26).
- You used existing data from a profile that is not part of the upgrade program. *Everything DiSC Workplace®* and DiSC® Classic are the only profiles that qualify for a free upgrade.

28. Which DiSC Classic products can I upgrade to *Workplace on Catalyst* for free?

All DiSC Classic products are part of the free upgrade program to *Workplace on Catalyst*. To ensure you receive the free upgrade, just make sure to use existing data when assigning the access code (see question 26).

29. What if learners don't have email addresses?

Catalyst is a digital platform that requires a learner to have an email address. Unfortunately, learners without an email address will be unable to use the Catalyst platform but could explore options with other Everything DiSC® solutions.

30. Why can't I see other Everything DiSC profiles in Catalyst?

Everything DiSC Workplace on Catalyst is currently the only profile available for use on the Catalyst platform.

31. Why can't I add my Catalyst profile to MyEverythingDiSC?

Workplace on Catalyst is not available for use on MyEverythingDiSC.