

# Administrator Experience Quick Reference Guide

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Action	EPIC	Catalyst™
<b>Assessments and Upgrades</b>		
Assign Catalyst™ assessment to new learner	Manage Reports > Create new report/issue access code	Account <sup>1</sup> > Organization > Learners > Click the + Add button
Bulk assign Catalyst assessments to new learners	Manage Reports > Create new report/issue access code	Account <sup>1</sup> > Organization > Learners > Click the Import button
Upgrade existing learners to Catalyst	Manage Reports > Batch Functions > Catalyst: Upgrade from Existing Reports	Not applicable; upgrades are only available in EPIC
Identify incomplete assessments for an organization	Manage Reports > Edit Existing Reports > Select 'Pending' access code status and relevant folders before entering the Organization name	Account <sup>1</sup> > Organization > Learners > Click Filter and select Incomplete
Send unscheduled ("on-the-fly") assessment reminder(s)	Manage Reports > Resend Login Info	Account <sup>1</sup> > Organization > Learners > Select learner(s) and click Send Reminder
View and/or edit pending invitations and reminders	Manage Reports > Batch Functions > Edit Delivery Options for Access Code Groups	Account <sup>1</sup> > Organization > Learners > Scheduled Invitations
<b>Applications/Content</b>		
Add Agile EQ™ and/or Management content to existing Catalyst learner(s)	Manage Reports > Catalyst: Add Applications to Access Codes	Account <sup>1</sup> > Organization > Learners > Select learner(s) and click Unlock Content
<b>Reports</b>		
Generate PDF report (i.e. "profile") for Catalyst learner(s)	Manage Reports > View/Print/Email Completed Reports	Account <sup>1</sup> > Organization > Learners > Select learner(s) and click Generate Reports
Generate activity reports	Manage Your Account > Account Activity Reports	Not available at this time
Create a downloadable DiSC® map for a group of learners	Manage Reports > Create new report/Issue access code > Everything DiSC® Group Culture Report	Account <sup>1</sup> > Organization > Groups > Add Group > Download Group Map
<b>Learner, Organization, and Department Maintenance</b>		
Search for a learner by name or email address when you do not know their organization	Manage Reports > Edit Existing Reports	Not available at this time
Edit the name or email address associated with a Catalyst assessment	Manage Reports > Edit Existing Reports	Account <sup>1</sup> > Organization > Learners > Click learner's name or email address
Move a learner to a different organization	Manage Reports > Edit Existing Reports > Search and select the access code to edit the Organization	Not available at this time
Reclaim unused credits	Manage Your Account > Unassign Access Codes/Reclaim Credits > Search > Select access codes > Click the Unassign Access Codes button	Account <sup>1</sup> > Organization > Learners > Click learner's name or email address > Click the Reclaim credits button
Archive a Catalyst learner	Not applicable; archiving a learner is only available in the Catalyst Administrator Experience	Account <sup>1</sup> > Organization > Learners > Click learner's name or email address > Click the meatball menu > Click Archive Learner
Edit organization name, location, and/or logo	Manage Your Account > Manage My Organizations	Account <sup>1</sup> > Organization > Click the organization's name from the left sidebar
Manage Catalyst departments	Manage Your Account > Manage My Organizations	Account <sup>1</sup> > Organization > Departments

<sup>1</sup> Only Administrators that have synced more than one EPIC user with their Catalyst user must select an Account before selecting an Organization.