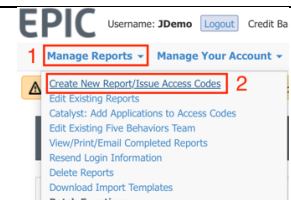


Assigning New Access Codes to Learners

To Begin

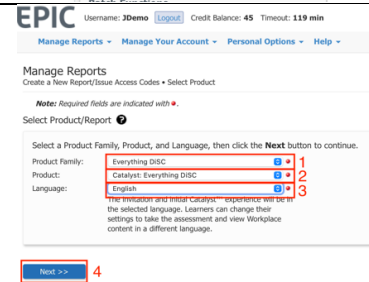
1. Under the Manage Reports Menu
2. Select Create New Report/Issue Access Code



Choose Assessment Selections from 3 drop down menus

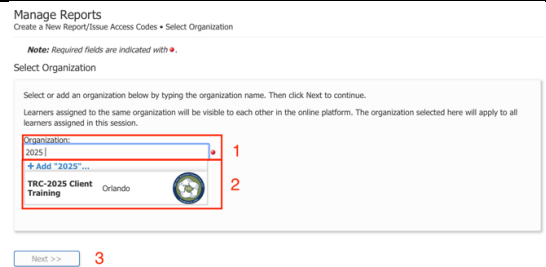
This Example is providing a Everything DiSC® Catalyst Assessment

1. Select Product - Family Everything DiSC
2. Select Product - Catalyst: Everything DiSC
3. Select Language - Defaults to English
4. Click Next>> button



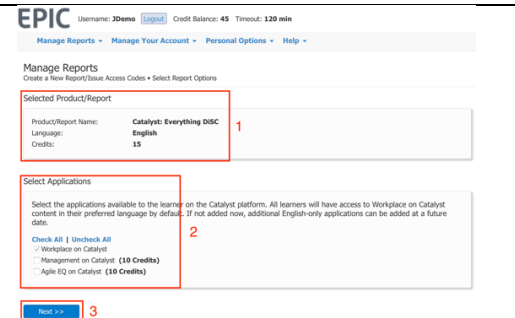
Catalyst Only Selections:

1. Begin typing Organization Name for these Learners
2. Select Add when desired Organization is completed or select from the list an already established Organization in your account
3. Once selected click the Next>> button



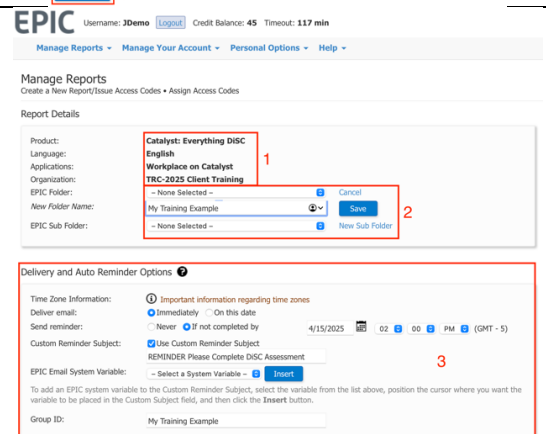
Select Report Options:

1. Note Assessment and Credits being Used
2. Catalyst options shown, select other content if desired
3. Click the Next>> button



Organize your Learner Data (top part of page)

1. Note Selections to this point
2. Create or choose where to file these assessments
3. Set up when to send and any reminders for your Learners



Assigning New Access Codes to Learners

Adding your Learners (bottom part of page)

1. Choose your method to add your learners from the tabbed options.
2. Once added you can review from the list of added learners
3. Catalyst only check the box confirming the organization
4. Click the Assign Access Code(s) button

Add Respondents

Enter Individual Import from Excel Use Existing Report

After entering the Respondent information, click the Add button to add the name to the list. Click the Assign Access Code(s) button when you're finished adding Respondents.

(Note: If you assign more than 10 Access Codes, they will be queued for delivery and sent out in intervals to avoid being marked as "spam" by the Respondent's email server.)

Email: Name: Quantity: View Report: Yes Add

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

Email	Name	Qty/Cr	View
X stevie@resourceconnection.com	Stevie Smith	1 (15cr)	Yes

Total Quantity: 1
Total Credits: 15

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

Assign Access Code(s)

Confirm Credits being used

1. To continue click OK from the popup menu to continue
2. Next popup menu will ask if you want to include a message. Click OK or Cancel

(We clicked Cancel but if OK was selected you will be able to select your message and finish as seen in next step.)

15 credits will be deducted from your Account. Click OK to continue.

Cancel OK

Click OK to include a custom email message or change the subject line. Click Cancel to bypass.

Cancel OK

Process Complete!

1. Summary of assessment sent
2. Summary of Recipients and Credit Balance

EPIC Username: J08moa Logout Credit Balance: 30 Timeout: 120 min

Manage Reports Manage Your Account Personal Options Help

Manage Reports
Create a New Report(Save Access Codes) Report Details

The action you requested has been completed.

Report Details

Product:	Catalyst: Everything DiSC
Language:	English
Applications:	Workplace on Catalyst
Organization:	TRC-2025 Client Training
Folder:	2025 EPIC Training
Sub Folder:	
Deliver email:	Immediately
Send reminder:	Never

1. Summary of Assigned Assessments

Respondents

Show/Hide	Name	View	Status
steve@resourceconnection.com	Stevie Smith	Yes	Access Code created and email sent.

Summary

Total Access Codes Created:	1
Previous Credit Balance:	45
Total Credits Charged:	15
New Credit Balance:	30

2. Summary includes Credit Balance Changes

Create another Report

