

## Team Assessment



The Extended DISC® Team Assessment is based on the responses given in the Extended DISC® Individual Assessment. This multi-person report should not be the sole criterion for making for making decisions about this team. The purpose of this report is to provide supporting information for the team and management.

## Sample Team

Organization:  
ABC Inc.

Date:  
06.10.2013



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# Printing Team Reports

# Team Reports: Getting Started



WEBSITE: <https://www.FinxS.com/admin>

Enter your information:

- Username:
- Password:
- Click “Submit”

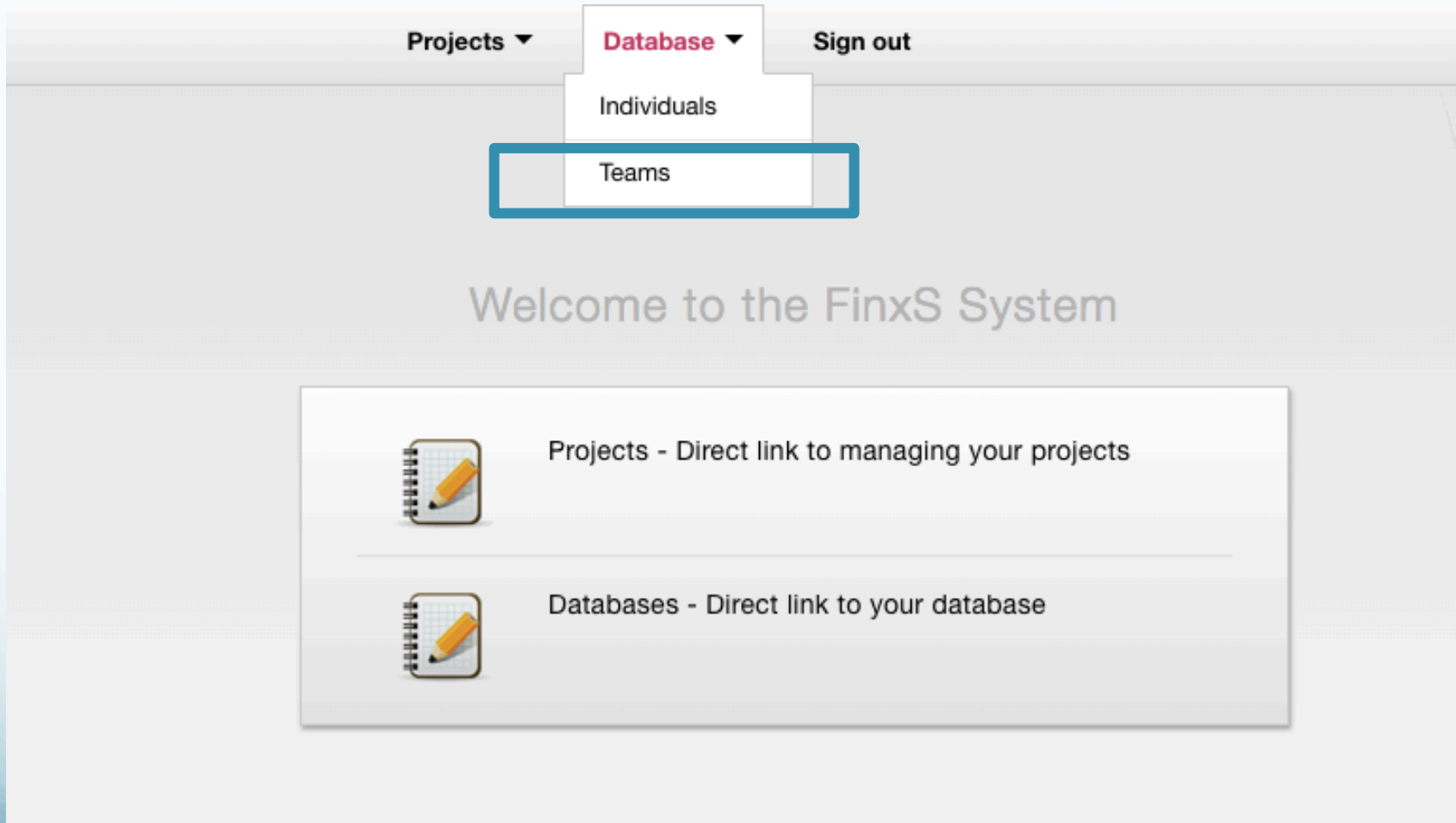
A screenshot of a web login form. The form is titled "Log In" and contains the instruction "Enter your username and password below". It features two input fields: "Username" with a person icon and "Password" with a lock icon. Below the fields is a link for "Forgot password?" and a red "Submit" button with a right-pointing arrow.

*\*If this is your first time to your user account you will need to accept the “Conditions for Use”*

# Team Reports: Creating the Team Database



- Team Database allows you to save Team data
- From main menu tabs click on **Database** and choose **Teams**



# Team Database: New Team

- The left column contains all teams that are created in your user account
- To create a new team, choose “+” from lower left corner

## FinxS

Projects ▾ Database ▾ Sign out

My Teams

MY TEAMS

abc inc  
Project Sample  
SMPL Super Team  
Super P Team  
Super S Team  
Super Team  
Taylors Sample  
Taylors Team  
Team Report Demo  
Team Sample

Teams

Organization Chart

Team Manager - Individuals

Team Manager - Surveys

Owner	Prospect Demo
Name	abc inc
Full name	
Organization	abc inc
Type	Static
Usage Rights	1 user <input type="button" value="Edit"/>
Job Template	
No. of people	4
No. of surveys	0
Created / Updated	12.15.2015 17:11:42 / 01.08.2016 17:09:08

Print PDF

FinxS Playground



# Team Database: New Team



Complete the following fields (“\*” denotes required field):

1. **Name** of the team (16 characters maximum) this is what shows up on the table of content column/screen
2. **Full name** – (optional) this is what overrides “Name” on the report cover. Complete if name of team is longer than 16 characters otherwise, “Name” in the above field will show up on report cover.
3. **Organization**
4. Leave all other fields blank
5. Choose “**Static**” to manually enter team members. If “**Dynamic**” is chosen it allows you to choose a **Project** (Access Code) or **User** instead of having to select each individual team member. All individuals under a specified **Project** (Access Code) or everyone under a **User** will be automatically added to this team.
6. Click on “**Save**” in lower right

Teams	Organization Chart	Team Manager - Individuals	Team Manager - Surveys
Owner	United Kingdom		
Name	<input type="text"/> *		
Full name	<input type="text"/>		
Organization	<input type="text"/> *		
Usage rights	0 users <input type="button" value="Edit"/>		
Job Template	<input type="text"/>		
No. of people	0		
No. of surveys	0		
Type	<input checked="" type="radio"/> Static <input type="radio"/> Dynamic		
<input type="button" value="Cancel"/> <input type="button" value="Save"/>			

# Team Database: New Team



## Team Database Confirmation

Team was created successfully

x

Owner	United Kingdom
Name	2016 SAMPLE TEAM
Full name	
Organization	SAMPLE TEAM INC
Type	Static
Usage Rights	1 user <input type="button" value="Edit"/>
Job Template	
No. of people	0
No. of surveys	0
Created / Updated	04.19.2016 12:25:48 / 04.19.2016 12:25:48

# Team Database: Selecting Team Members

1. Select the newly created Team from left column
2. Select **Team Manager - Individuals** tab

The screenshot shows the FinxS web application interface. On the left, a sidebar titled 'MY TEAMS' lists several teams, with 'Team Sample' highlighted in a red box. A blue arrow points from this box to the 'Team Manager - Individuals' tab in the main content area. The main content area has a top navigation bar with 'Projects', 'Database', and 'Sign out' options. Below this, there are four tabs: 'Teams', 'Organization Chart', 'Team Manager - Individuals' (highlighted with a blue box), and 'Team Manager - Surveys'. The 'Team Manager - Individuals' tab displays a table with the following data:

Owner	Prospect Demo
Name	Team Sample
Full name	
Organization	ABC Inc
Type	Static
Usage Rights	1 user <input type="button" value="Edit"/>
Job Template	
No. of people	8
No. of surveys	0
Created / Updated	09.30.2015 16:53:37 / 07.26.2016 18:01:31

At the bottom of the main content area, there are two buttons: 'Print PDF' and 'FinxS Playground'.

# Team Database: Selecting Team Members



- Select **All Results** from left
- Make sure your team is highlighted (e.g. 2016 Sample Team, Sales Leaders, etc)

The screenshot shows the FinxS web application interface. The top navigation bar includes 'Projects', 'Database', and 'Sign out'. The left sidebar contains a list of teams, with 'All Results' and 'Team Sample' highlighted. The main content area shows a table of team members with columns for Last name, First name, Organization, Date, and Tool. The table is filtered to show 8 results.

		Last name	First name	Organization	Date	Tool
1	<input type="checkbox"/>	Lee	David	FinxS	11.21.2013	Behavioral Analysis
2	<input type="checkbox"/>	Martin	Monica	FinxS	11.21.2013	Behavioral Analysis
3	<input type="checkbox"/>	McSample	Andy	Acme, Inc.	08.22.2014	Behavioral Analysis
4	<input type="checkbox"/>	Ringwald	Molly	ACME	08.22.2014	Behavioral Analysis
5	<input type="checkbox"/>	Sample	Person2	FinxS	04.23.2011	Behavioral Analysis
6	<input type="checkbox"/>	Sample	Cindy	ABC Inc	04.28.2015	Behavioral Analysis
7	<input type="checkbox"/>	Sample	Person3	FinxS	04.24.2011	Behavioral Analysis
8	<input type="checkbox"/>	Williams	Margaret	FinxS	11.21.2013	Behavioral Analysis



# Team Database: Selecting Team Members

- Make sure your active team is highlight in left column
- Chose individuals you want to add to the team by  checking the box next to the last name
- You can also designate the team leader by clicking

The screenshot shows the 'Team Manager - Individuals' page in the FinxS system. On the left, a sidebar lists various teams, with 'Team Sample' highlighted in red. The main area displays a table of team members with columns for selection, last name, first name, organization, date, and tool. Several members have their selection checkboxes checked. A red box highlights the 'Team Sample' in the sidebar, and a blue box highlights the selection column in the table. Arrows point from the text instructions to these elements.

	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Last name	First name	Organization	Date	Tool
1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Lee	David	FinxS	11.21.2013	Behavioral Analysis
2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Martin	Monica	FinxS	11.21.2013	Behavioral Analysis
3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	McSample	Andy	Acme, Inc.	08.22.2014	Behavioral Analysis
4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Ringwald	Molly	ACME	08.22.2014	Behavioral Analysis
5	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	Sample	Cindy	ABC Inc	04.28.2015	Behavioral Analysis
6	<input type="checkbox"/>	<input type="checkbox"/>	Sample	Sam	EDNA	06.04.2013	Behavioral Analysis
7	<input type="checkbox"/>	<input type="checkbox"/>	Sample	Person1	FinxS	04.23.2011	Behavioral Analysis
8	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sample	Person3	FinxS	04.24.2011	Behavioral Analysis
9	<input type="checkbox"/>	<input type="checkbox"/>	Sample	Edna	ABC Inc	12.09.2013	Behavioral Analysis
10	<input type="checkbox"/>	<input type="checkbox"/>	Sample	Suzanne	Widgets Inc.	08.21.2013	Behavioral Analysis
11	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sample	Person2	FinxS	04.23.2011	Behavioral Analysis
12	<input type="checkbox"/>	<input type="checkbox"/>	Smith	Andy	Acme, Inc.	08.26.2013	Behavioral Analysis
13	<input type="checkbox"/>	<input type="checkbox"/>	Taylor	James	FinxS	11.21.2013	Behavioral Analysis
14	<input type="checkbox"/>	<input type="checkbox"/>	Taylor	Brian	FinxS	11.21.2013	Behavioral Analysis
15	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Williams	Margaret	FinxS	11.21.2013	Behavioral Analysis
16	<input type="checkbox"/>	<input type="checkbox"/>	Williams	Eric	FinxS	11.21.2013	Behavioral Analysis

# Team Database: Ordering and Printing



- Click back on **Teams** tab
- Make sure your team is highlight from left column
- Click **Print PDF**

**FinxS** Projects Database Sign out

My Teams

MY TEAMS

- abc inc
- Project Sample
- SMPL Super Team
- Super F Team
- Super S Team
- Super Team
- Taylor's Sample
- Taylor's Team
- Team Report Demo
- Team Sample**

Teams Organization Chart Team Manager - Individuals Team Manager - Surveys

Owner	Prospect Demo
Name	Team Sample
Full name	
Organization	ABC Inc
Type	Static
Usage Rights	1 user <input type="button" value="Edit"/>
Job Template	
No. of people	8
No. of surveys	0
Created / Updated	09.30.2015 16:53:37 / 07.27.2016 18:40:33

# Team Database: Print Options



1. PDF Type: **Multiperson report**
2. Report: eg. "Demo STANDARD TEAM"
3. Method: **Download PDF** or **Send Email**
  - a. If you chose "Download PDF" – system will download the file directly to your computer
  - b. If you chose "Send Email" – type in email address in "To" field, "cc" field etc.
4. **Group Name**
5. **Organization**
6. Click **OK**

**Options**

PDF TYPE:  
Multiperson report

REPORT:  
Demo STANDARD TEAM ASSESSMENT

LANGUAGE:  
English (US)

METHOD:  
Send Email

GROUP NAME:  
Team Sample

ORGANIZATION:  
ABC Inc

TO:  
christina.bowser@extendeddisc.org

CC:

BCC:

POINTS:

Behavioral Analysis:	0
Reasoning:	0
Surveys:	0
Open 360:	0
Total cost:	0

SELECTED PERSONS (8):  
David Lee (11.21.2013)

OK Close

# Team Database: Confirmation



- After choosing a send method system will show “Email has been sent.”

The screenshot shows a web application interface. At the top, there is a navigation bar with 'Projects', 'Database', and 'Sign out' dropdown menus, and 'Language' and 'Prospect Demo' dropdown menus. A green notification banner at the top left contains the text 'Email has been sent' and a close button 'x'. Below the notification is a table with the following data:

Owner	Prospect Demo
Name	Team Sample
Full name	
Organization	ABC Inc
Type	Static
Usage Rights	1 user <input type="button" value="Edit"/>
Job Template	
No. of people	8
No. of surveys	0
Created / Updated	09.30.2015 16:53:37 / 07.27.2016 18:40:33

At the bottom of the table, there are three buttons: 'Print PDF', 'FinxS Playground', and 'Edit'.

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+1.281.298.6073

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