



## Adding a Logo To a Report

# Adding a Logo: Getting Started



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

Enter your information:

- Username:
- Password:
- Click “Submit”

Log In

Enter your username and password below

Username

Password

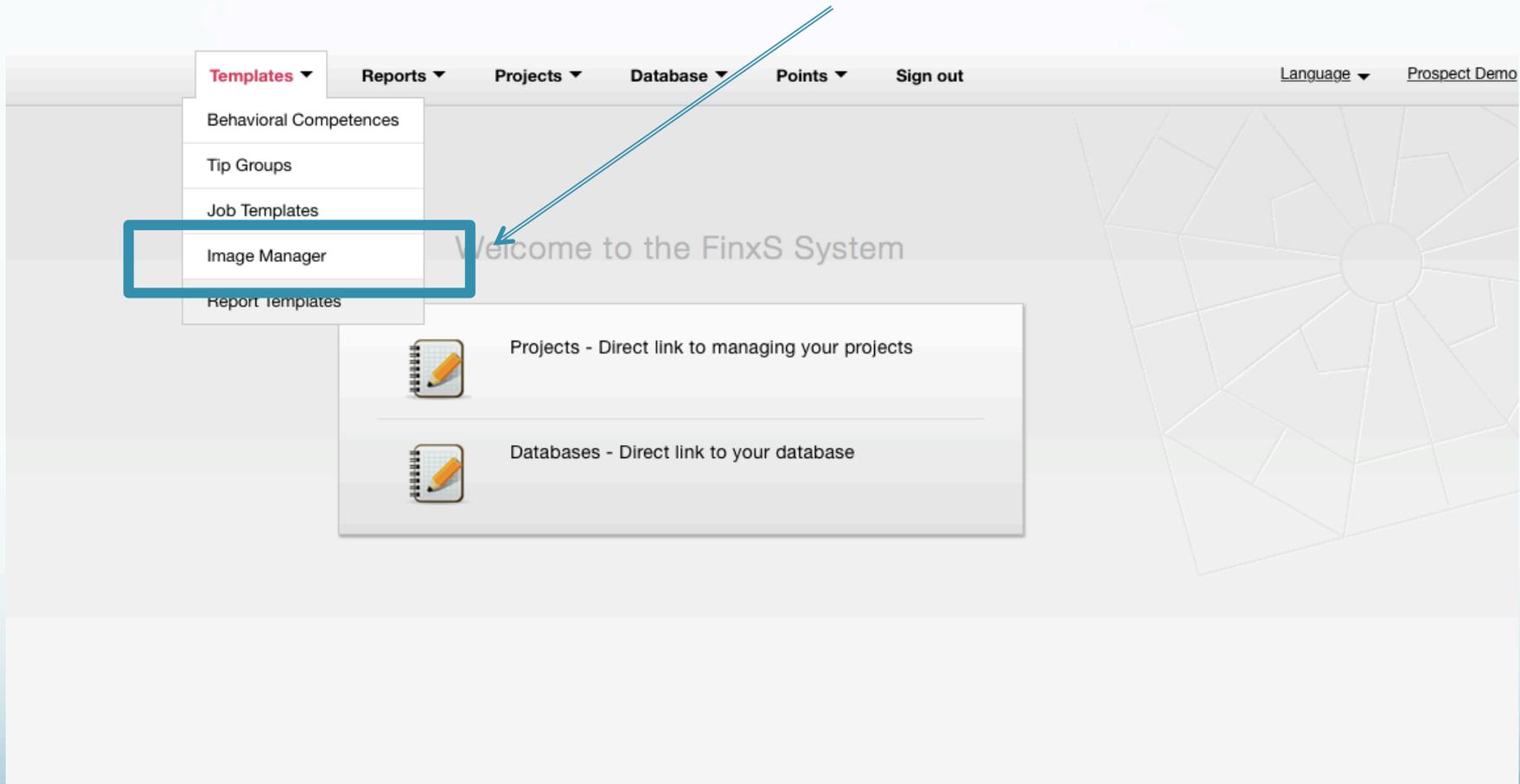
[Forgot password?](#)

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

# Adding a Logo: Image Manager



- First we need to upload your logo into the system. To do this, from main menu tabs click on **Templates** and choose **Image Manager**



# Adding a Logo: Image Manager



- To upload a new image, click on the “+” sign in the bottom left corner
- Fill in the **Name** of the image and **Description** (optional)
- Click on **Choose File** and select the image
- Press **Save**

## IMAGE MANAGER

Bigstock-portrait-of-dentist-and-dentist  
Extended-disc-horizontal

I confirm that I have the copyright for this image, and I am not going to include the image in anything that would be illegal, unethical or violate someone's copyright, and that the image itself does not contain anything unethical or illegal. I will be responsible for any consequences from using this image or allowing other users to use it.

Owner	Prospect Demo
Name	<input type="text"/>
Description	<input type="text"/>
Image file	<input type="button" value="Choose File"/> no file selected
Primary language	<input type="button" value="All languages"/>

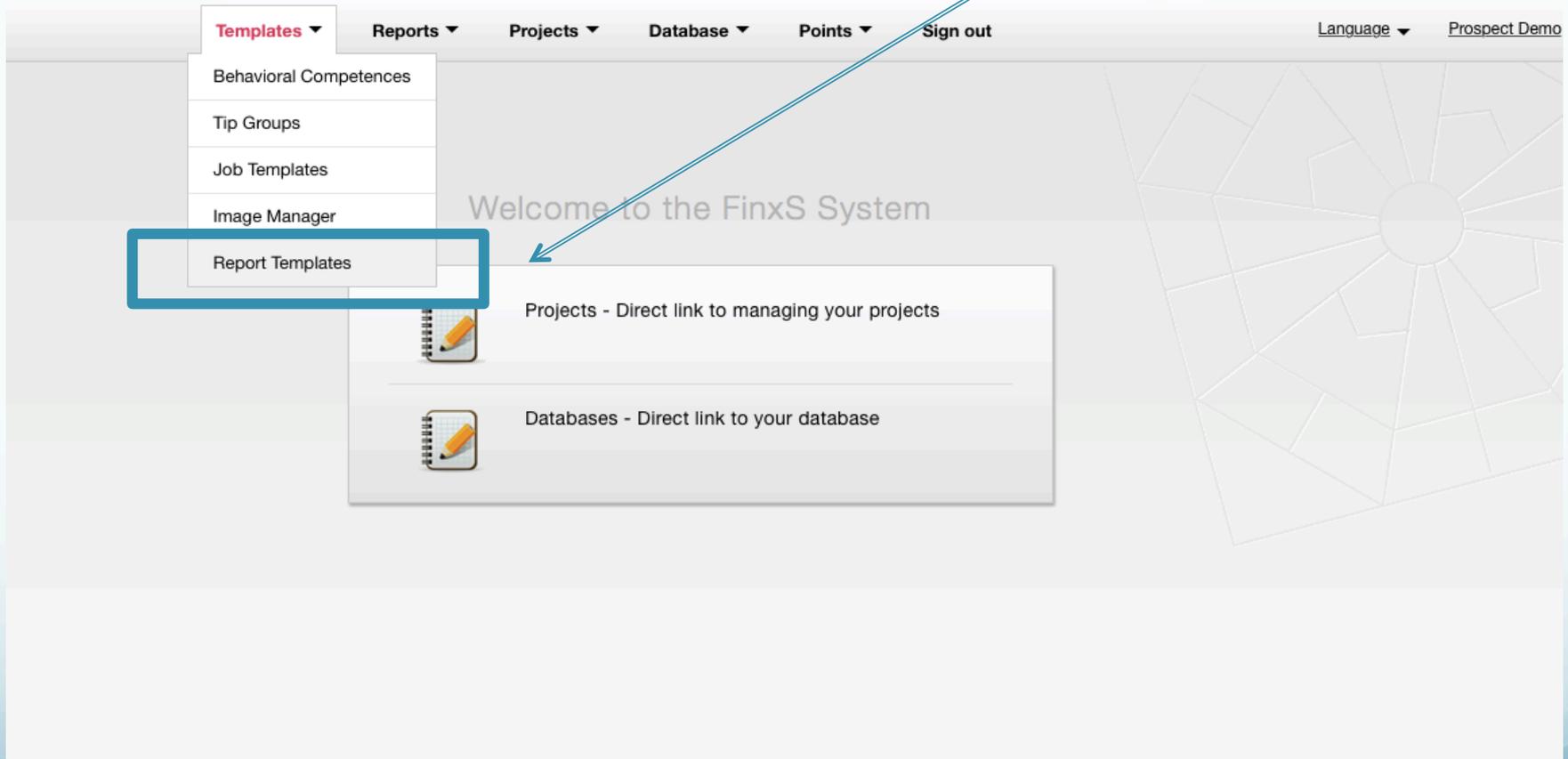
**Note:** Image must be 900Kb or smaller and in .png or .jpeg format

Copyright 1995 - 2017 Finxs Oy Ltd

# Adding a Logo: Report Templates



- From top menu tabs click on **Templates** and choose **Report Templates**



# Adding a Logo: Report Templates



- From the left column, choose the template you would like to add the logo to, scroll down and click **Clone**
- Rename the template and press **Save**

My Templates

MY TEMPLATES

- Church Template - no color band
- Comcast Coaching Team
- Comcast Individual
- EDNA Leadership Template
- Financial Advisor Assessment Te...
- Financial Advisor Template Grey
- Green Tip Tahoma Font Template**
- NACPA Template - no color band
- Open 360 for Non reports
- Orange Sales Assessment Tahom...
- Sample 5 Guys
- Team Template
- YourDISCStyle
- YourDISCStyle DMO

Report Template | Cover Page | Content Page | Instructions | Summary

Owner	United Kingdom
Name	Green Tip Tahoma Font Template
Description	Tahoma 10 Font
Usage_Rights	674 users <input type="button" value="Edit"/>
Cloneable	Yes
Automatically available for new users	Yes
Default	No <input type="button" value="Make default"/>
Created / Updated	02.06.2015 22:54:32 / 06.25.2015 15:13:14
Associations	The Report Template is currently associated with the following resources: <ul style="list-style-type: none"><li>▶ Reports (9)</li><li>▶ Reasoning projects (0)</li></ul>

# Adding a Logo: Report Templates

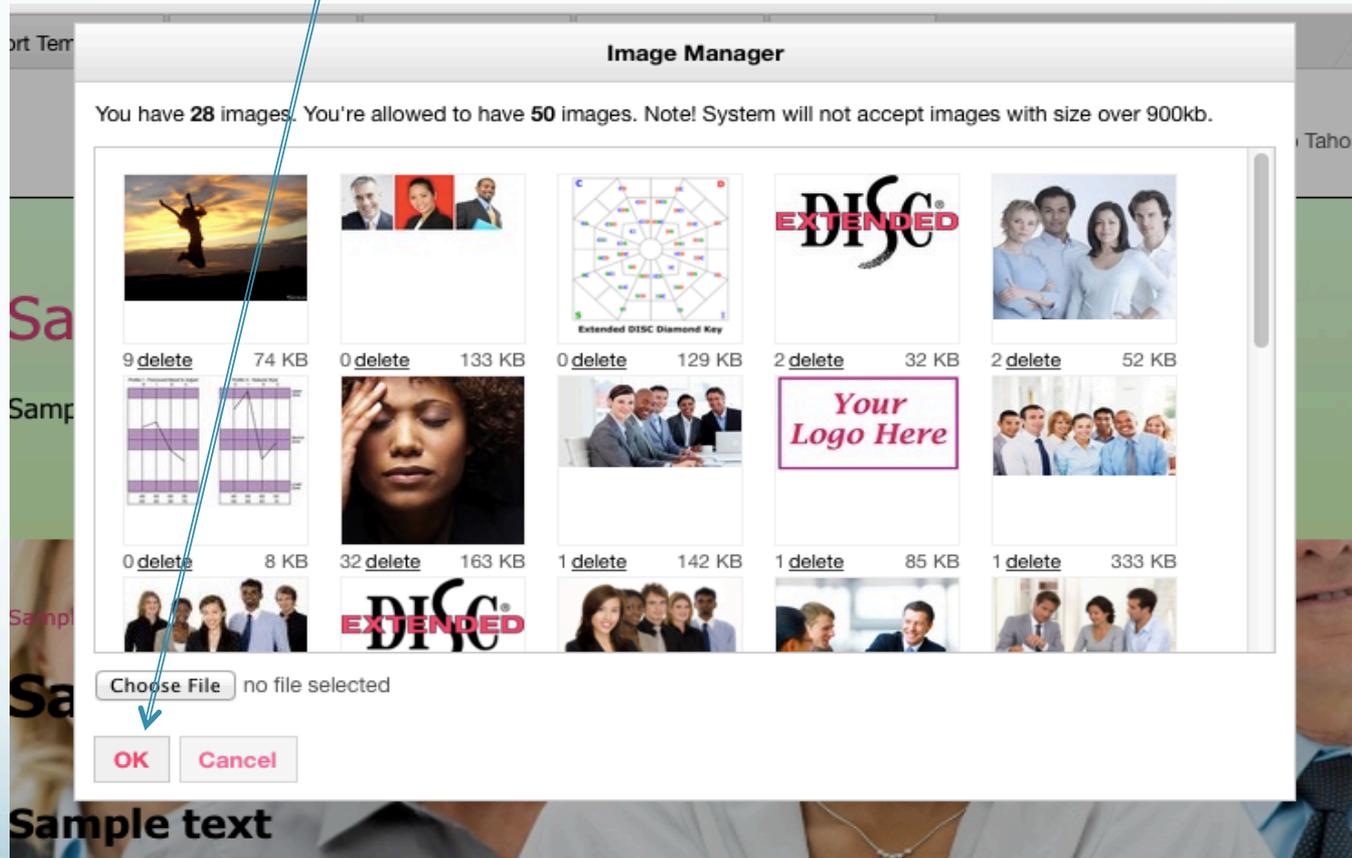


- Click on the **Cover Page** tab, and press **Edit**
- On the Left, the page is divided into 3 sections, Header, Middle, Footer
- To add to logo to the top corner, click on **Upload** under the Header - Logo section

# Adding a Logo: Report Template



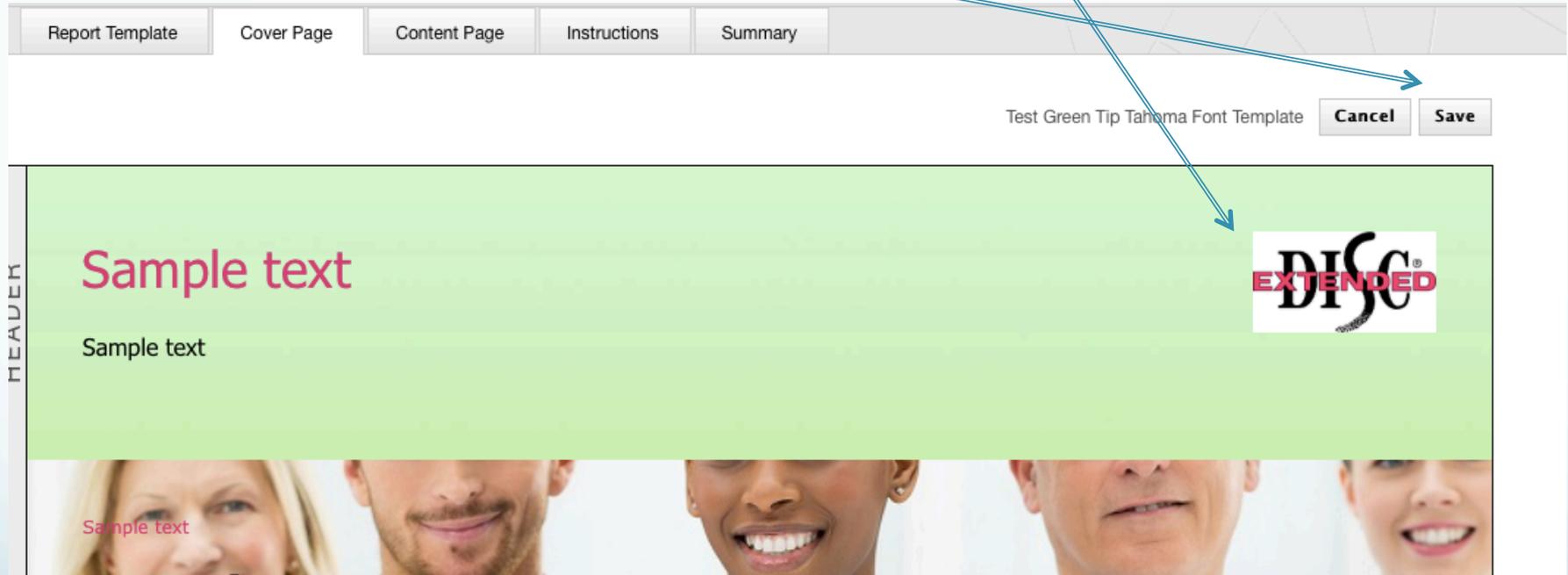
- The Image Manager will appear
- Select **your logo** to upload and press **OK**.



# Adding a Logo: Report Template



- Your logo should now appear in the top right corner of the report
- Click on **Save**



Report Template | Cover Page | Content Page | Instructions | Summary

Test Green Tip Tahoma Font Template | Cancel | Save

HEADER

Sample text

Sample text

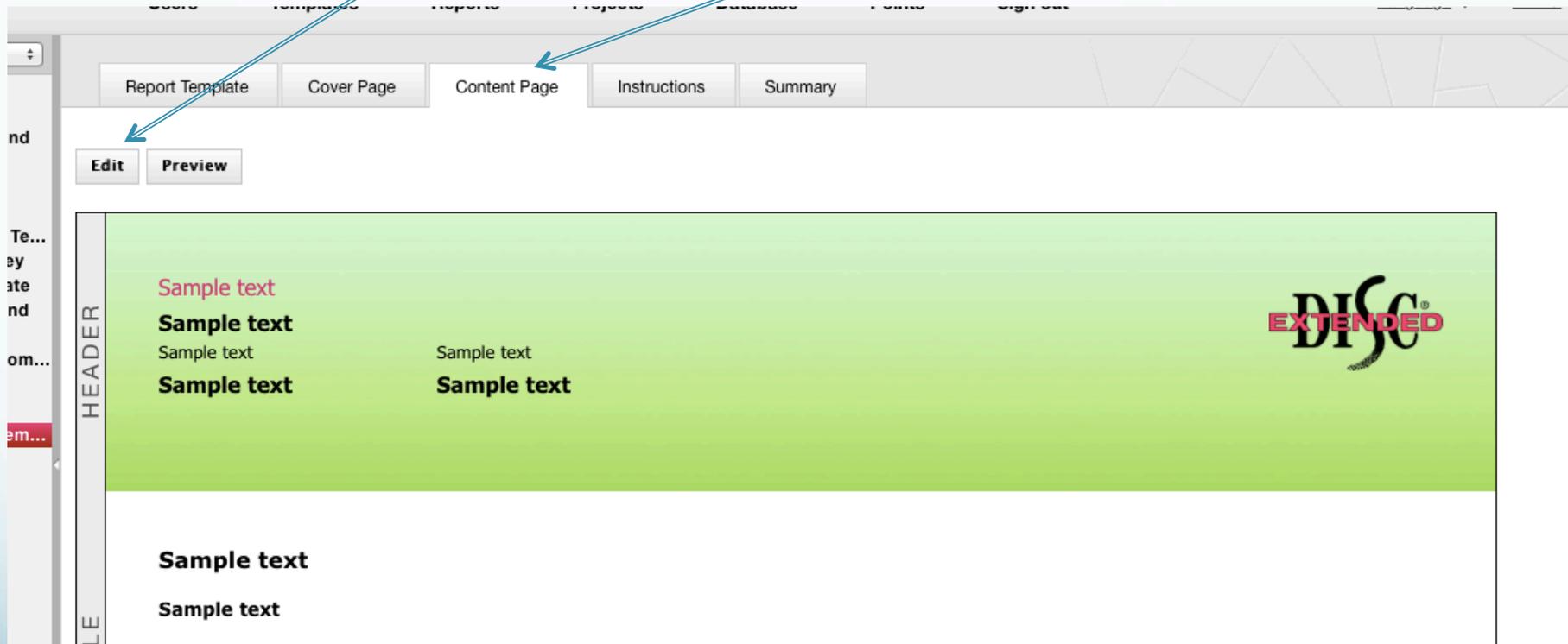
DISC<sup>®</sup>  
EXTENDED

Sample text

# Adding a Logo: Report Template



- This added the logo to the Cover Page only, to have logo on each of the content pages of the report, click on the tab, **Content Page**
- Click on **Edit**



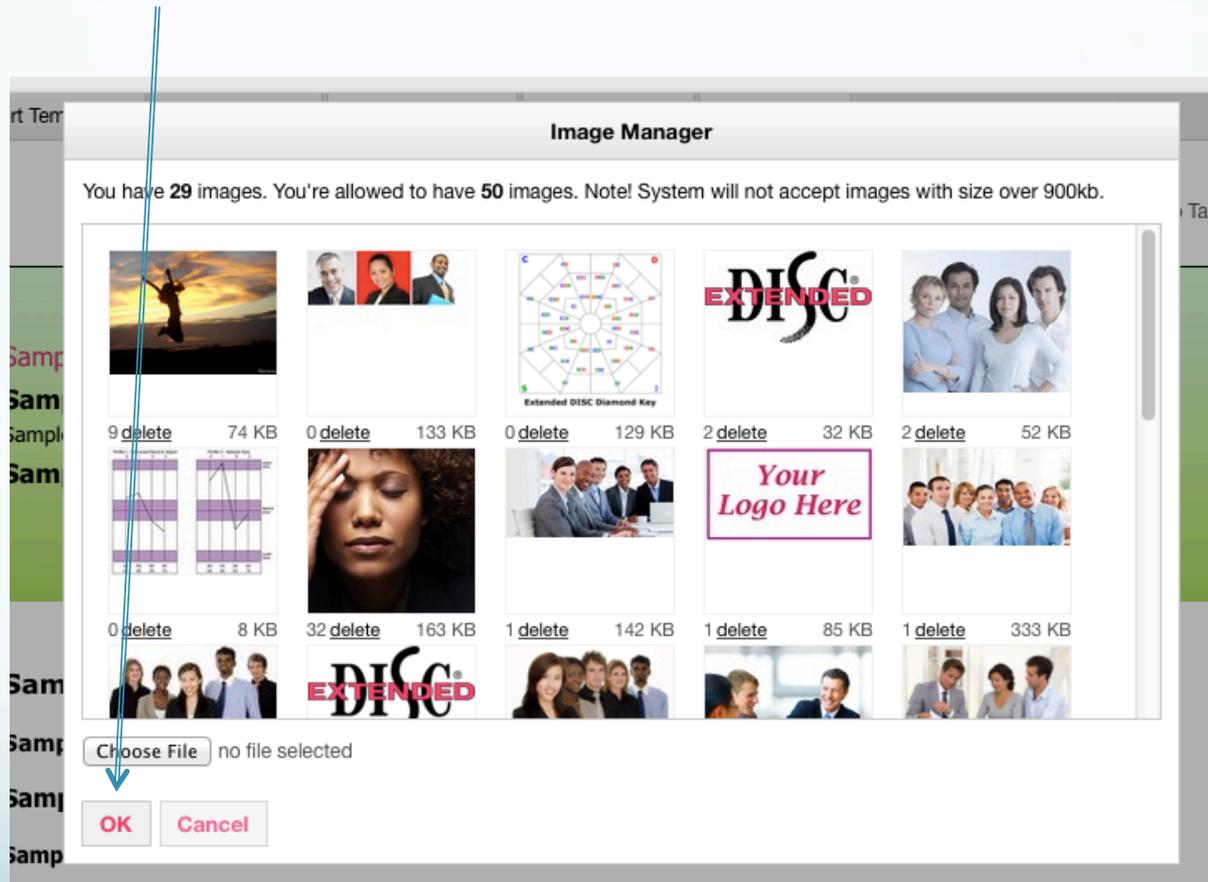
The screenshot shows a software interface for editing report templates. At the top, there are several tabs: 'Report Template', 'Cover Page', 'Content Page', 'Instructions', and 'Summary'. The 'Content Page' tab is currently selected. Below the tabs, there are two buttons: 'Edit' and 'Preview'. The 'Edit' button is highlighted with a red box. The main area of the interface displays a preview of a report page with a green header and white body. The header contains the text 'Sample text', 'Sample text', 'Sample text', and 'Sample text'. The body contains the text 'Sample text' and 'Sample text'. The 'EXTENDED DISC' logo is visible in the top right corner of the header area.



# Adding a Logo: Report Template



- Select your logo again and click **OK**



# Adding a Logo: Report Template



- Press **Save**

A screenshot of a web-based report template editor. At the top, there is a navigation menu with items: Users, Templates, Reports, Projects, Database, Points, Sign out, Language, and DEMO. Below the menu is a tabbed interface with tabs for Report Template, Cover Page, Content Page, Instructions, and Summary. The 'Report Template' tab is active. In the top right corner of the editor area, there is a preview of the template with the text 'Test Green Tip Tahoma Font Template' and two buttons: 'Cancel' and 'Save'. A blue arrow points from the 'Save' button in the list above to the 'Save' button in the interface. The main content area shows a green gradient background with a vertical 'HEADER' label on the left. The header contains several lines of 'Sample text' in different colors and weights, and the 'DISC EXTENDED' logo on the right. Below the header, there is more 'Sample text' on a white background.

# Adding a Logo: Linking Template to Report



- If this Report Template is not already linked to the report, go to the report under **"Reports"** tab at top of page
- Click on the arrow next to Behavioral Analysis Report until you see your reports

A screenshot of the FinxS web application interface. The top navigation bar includes 'Users', 'Templates', 'Reports', 'Projects', 'Database', 'Points', and 'Sign out'. The 'Reports' tab is selected and highlighted with a blue box. Below the navigation bar, there are two tabs: 'Reports' and 'Summary'. The 'Reports' tab is active, showing a list of report templates. On the left side, there is a sidebar titled 'MY TEMPLATES' with a search box and a list of templates. The first template, 'Behavioral Analysis Report (43)', is expanded, showing a list of sub-templates. A blue arrow points from the 'Behavioral Analysis Report (43)' in the sidebar to the 'Reports' tab in the main content area. Another blue arrow points from the 'Behavioral Analysis Report (43)' in the sidebar to the 'Reports' dropdown menu in the top navigation bar.

# Adding a Logo: Linking Template to Report



- Select the report you would like the report template tied to, scroll down and press **Edit**

The screenshot shows a web interface for managing reports. On the left is a sidebar with a list of reports, including 'Church Individual Asses...', 'Clone of Sales Job Profile', 'Clone of Virtual Employ...', 'Corbran Individual Asse...', 'Halle Test Report', 'Individual Assessment ...', 'INDIVIDUAL ASSESSME...', 'INDIVIDUAL ASSESSME...', 'NACPA Assessment', 'Sales Professional Asse...', 'Sample Individual Candi...', 'Summary of Individual A...', 'Test Individual Assessm...', 'test Sandler', 'Verizon LHPT', 'Verizon Test', and 'Your DISC Assessment ...'. The 'Individual Assessment ...' report is highlighted in red. On the right is a detailed view of the selected report, 'Behavioral Analysis report'. The table below shows the report's details:

report tool	Behavioral Analysis report
Description	DEMO Newest 02/20/2104
Show page numbers	Yes
Cloneable	Yes
Automatically available for new users	Yes
Report Group	
Languages available	English (Australasia), English (UK), English (US)
Default Language	English (US) (Change in Report Designer)
Created / Updated	02.20.2014 15:22:07 / 02.20.2014 15:22:47
Usage rights	3 users <input type="button" value="Edit"/>
Report Template the report is based on	<u>YourDISCStyle DMO</u>
Associations	The Report is currently associated with the following resources: <ul style="list-style-type: none"><li>Behavioral Analysis projects (0)</li><li>Reasoning projects (0)</li></ul>
Print type	Cover Page & Content Pages

At the bottom of the interface, there are buttons for 'Report Designer', 'Preview', 'Edit', and 'Clone'. A blue arrow points from the 'Edit' button in the bottom right corner to the 'Edit' button in the 'Usage rights' row of the table.

# Adding a Logo: Linking Template to Report



- Click on the drop-down for **Report Template the report is based on** and select your template
- Press **Save**

The screenshot shows a configuration page for a report. On the left is a sidebar with a list of report categories, including 'Individual Assessment DMO' which is highlighted. The main area contains a table with various settings:

Description	DEMO Newest 02/20/2104
Show page numbers	<input checked="" type="checkbox"/>
Cloneable	<input checked="" type="checkbox"/>
Automatically available for new users	<input checked="" type="checkbox"/>
Make available for all users	<input type="checkbox"/>
Report Group	Favorites
Usage Rights	
Print type	
Report Template the report is based on	EDNA Leadership Template Team Template YourDISCStyle Open 360 for Non reports Financial Advisor Assessment Template ✓ YourDISCStyle DMO Green Tip Tahoma Font Template Orange Sales Assessment Tahoma Font Template Comcast Coaching Team Comcast Individual Financial Advisor Template Grey Sample 5 Guys NACPA Template - color band Church Template - no color band Test Green Tip Tahoma Font Template

At the bottom right, there are 'Cancel' and 'Save' buttons. A blue arrow points from the 'Save' button in the list to the 'Save' button on the page.

# Adding a Logo: Linking Template to Report



- Click on **Preview** to download a sample report

Description	DEMO Newest 02/20/2104
Show page numbers	Yes
Cloneable	Yes
Automatically available for new users	Yes
Report Group	Favorites
Languages available	English (Australasia), English (UK), English (US)
Default Language	English (US) (Change in Report Designer)
Created / Updated	02.20.2014 15:22:07 / 09.01.2016 16:50:13
Usage rights	3 users <input type="button" value="Edit"/>
Report Template the report is based on	<u>YourDISCStyle DMO</u>
Associations	The Report is currently associated with the following resources: <ul style="list-style-type: none"><li>▶ Behavioral Analysis projects (0)</li><li>▶ Reasoning projects (0)</li></ul>
Print type	Cover Page & Content Pages



[www.ExtendedDISC.org](http://www.ExtendedDISC.org)  
+1.281.298.6073

### Extended DISC VIP Client Resource Site

Sign up or login in often for articles, recorded webinars, sample reports, training resources and updates.