



Creating and Editing Projects (Access Codes)

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Getting Started



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

Enter your information:

- Username:
- Password:
- Click “Submit”

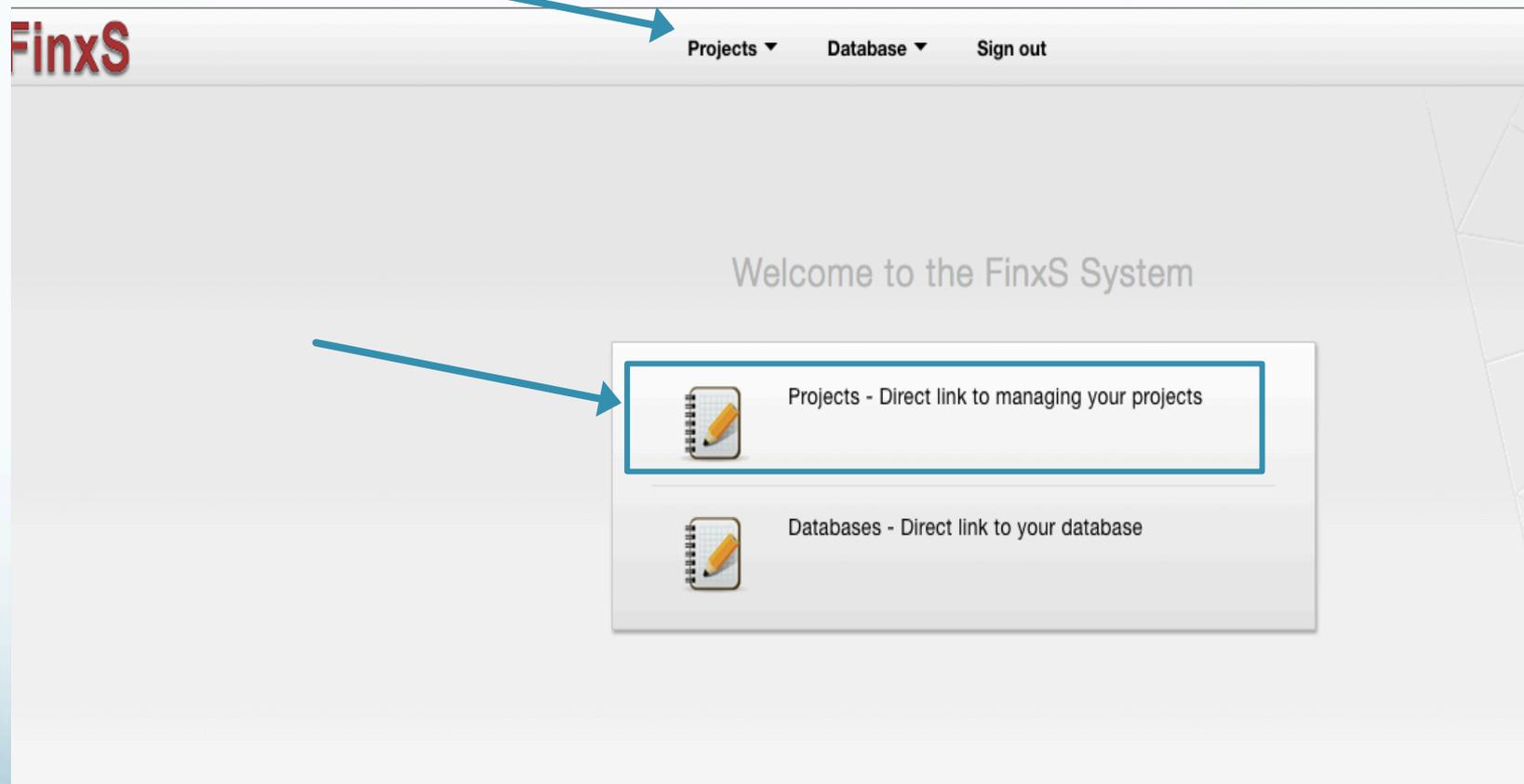
A screenshot of a web login interface. At the top, the text "Log In" is displayed in a light gray font. Below it, a white box contains the instruction "Enter your username and password below". There are two input fields: the first is labeled "Username" and has a person icon to its right; the second is labeled "Password" and has a padlock icon to its right. Below the fields, there is a link that says "Forgot password?". To the right of the fields is a red, rounded rectangular button with the word "Submit" and a right-pointing arrow.

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

Project/Access Code



- From main menu click on **Projects** or **Projects** tab at top (from pull down choose **Behavioral Analysis**)



Project/Access Code: Creating a new Access Code



- Click on the “+” in the lower left corner of screen

The screenshot displays the 'General' tab of a project configuration page. The left sidebar lists various project names, with 'ABC INC PLAYGROUND' highlighted in red. The main content area shows a table of project details:

Owner	Prospect Demo <input type="button" value="Change"/>
Country	United Kingdom
Organization	ABC Inc
Access Code	EUK-PLAYGROUND
Name	ABC INC PLAYGROUND
Name shown to respondent	EUK-PLAYGROUND
Send method	PDF - Report
Report	Demo Leadership Assessment
Language	English (US)
Protect PDF attachment	No
Answering interface	Default Answering Interface
Description	
Visibility Rights	1 user <input type="button" value="Edit"/>
Created / Updated	12.10.2013 14:30:35 / 04.16.2018 15:50:08
Research Module	TEST SURVEY 03.12.2015

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Project/Access Code: Creating a new Access Code



Complete the following fields:

- **Organization:** your organization
- **Access Code:**
 - First field with three letters (e.g., ENG-) should remain unchanged.
 - Type code in blank field (no more than 12 characters – no symbols) e.g., EUK-Acmelnc16
 - New Access Code must be unique from any existing code in our FinxS System
- **Name:** Type the Name of the Project/Access Code (e.g., Acme Inc Sales Dept) – Appears in left column
- **Name shown to respondent:** OPTIONAL, anything you enter here will appear above every question on the questionnaire

Country	<input type="text" value="United Kingdom"/>	*
Organization	<input type="text"/>	*
Access Code	<input type="text" value="ENG"/> - <input type="text"/>	*
Name	<input type="text"/>	*
Name shown to respondent	<input type="text"/>	
Send method	<input type="text" value="None"/>	*
Answering interface	<input type="text" value="Default Answering Interface"/>	*
Description	<input type="text"/>	
Research Module	<input type="text"/>	
Allowance Type	<input checked="" type="radio"/> Unlimited <input type="radio"/> Limited	
Require Password	<input type="radio"/> Yes <input checked="" type="radio"/> No	
First day open	<input type="text"/>	<input type="text"/>
Last day open	<input type="text"/>	<input type="text"/>
Status	<input type="text" value="Active"/>	*

Project/Access Code: Creating a new Access Code



- **Send Method:** Select “**PDF - report**”
- **Report:** Choose report you want linked to this Access Code (e.g., ABC Inc Sales Report)
- **Protect PDF attachment:** Optional, Check box if you would like additional security. Will require a password to open the respondents report from the email.
- **PDF attachment password:** If you chose to Protect PDF attachment, enter password needed to open report
- **Answering Interface:** “**Default Answering Interface**”
- **Description:** Optional, enter your details about the access code (e.g., Acme Inc Training 04/02/2014 or leave blank)
- **Research Module:** leave blank

Send method	PDF - Report *
Report	Demo Leadership Assessment *
Language	English (US) *
Protect PDF attachment	<input type="checkbox"/>
PDF attachment password	<input type="text"/>
Answering interface	Default Answering Interface *
Description	<input type="text"/>
Research Module	<input type="text"/>

Project/Access Code: Creating a new Access Code



- **To:, Cc:, Bcc:** enter emails that you would like the results sent to (separate multiple emails with a “,”)
- **Send to Respondent:** check box if you want a copy automatically sent to respondent
- **Allowance Type:** select “**Unlimited**” or “**Limited**” to limit number of assessments
- **Requires Passwords:** Recommend “**No.**” If “**Yes**” then type in # of passwords” you require
- **First day open:** enter date or leave blank and will today’s date be auto-filled when saved
- **Last day open:** enter closing date or leave blank
- Status: “**Active**”
- Click “**Save**”

To	<input type="text"/> *
Cc	<input type="text"/>
Bcc	<input type="text"/>
Send to respondent	<input type="checkbox"/>

Allowance Type	<input checked="" type="radio"/> Unlimited <input type="radio"/> Limited
Require Password	<input type="radio"/> Yes <input checked="" type="radio"/> No

First day open	<input type="text"/> <small>1/21</small>
Last day open	<input type="text"/> <small>1/21</small>
Status	Active <input type="text"/> *

Project/Access Code: Editing



- From column on the left, click on the Project/Access Code you want to edit
- You can view by **Project name** or **Access code** by selecting the pull down menu directly below the FinxS logo in upper left.
- Click on **"Edit"** in lower right corner

The screenshot shows the FinxS web interface. On the left, a sidebar lists project names under 'BEHAVIORAL ANALYSIS', with 'Candidates Report' selected. The main content area displays details for the 'Prospect Demo' project. The details are organized into sections: Owner, Country, Organization, Access Code, Name, Name shown to respondent, Send method, Report, Language, Answering interface, Description, Visibility Rights, Created / Updated, Research Module, To, Cc, Bcc, Send to respondent, First day open, Last day open, and Status. An 'Edit' button is located in the bottom right corner of the details table.

Owner	Prospect Demo	Change
Country	United Kingdom	
Organization	EDNA	
Access Code	ENG-DemCandidate	
Name	Candidates Report	
Name shown to respondent		
Send method	PDF - Report	
Report	Prospect Demo Candidate w/Questions	
Language	English (US)	
Answering interface	Default Answering Interface	
Description		
Visibility Rights	1 user Edit	
Created / Updated	06.10.2015 15:50:07 / 11.10.2015 17:59:22	
Research Module	None	
To	Margie.roesner@extendeddisc.org	
Cc	christina.bowser@extendeddisc.org	
Bcc		
Send to respondent	No	
First day open	06.10.2015	
Last day open	11.09.2015	
Status	Closed	

[View results in Database](#) [Edit](#)

Project/Access Code: Editing



- To change the **Report** linked to the Project/Access Code click on the pull-down menu and select the new report
- To update who the reports are emailed to, type in the email(s) in the appropriate field (e.g., “**To**” “**Cc**” and “**Bcc**”)
- When edits are completed click on “**Save**” in the lower right corner.

The screenshot shows the FinxS web application interface for editing a Project/Access Code. The interface includes a sidebar with a list of project names, a main form area, and a bottom navigation bar. A dotted line with arrows points from the list items to the corresponding fields in the form.

Project names: BEHAVIORAL ANALYSIS, Candidates Report, Christina Sample, DEMOTara, EUK-PLAYGROUND, Individual Report, New Mangers October 2015

Form Fields:

- Country: United Kingdom
- Access Code: ENG-DemCandidate
- Name: Candidates Report
- Name shown to respondent: [Empty]
- Send method: PDF - Report
- Report: Prospect Demo Candidate w/Quest
- Language: English (US)
- Answering interface: Default Answering Interface
- Description: [Empty text area]
- Research Module: [Empty]
- To: Margie.roesner@extendeddisc.org
- Cc: christina.bowser@extendeddisc.org
- Bcc: [Empty]
- Send to respondent: [Unchecked]
- First day open: 06.10.2015
- Last day open: 11.09.2015
- Status: Closed

Buttons: Cancel, Save

Project/Access Code: Test it



TIP: After you have created or edited an Access Code test it.

Enter your Access Code

[Change Language](#)

To complete FinxS Online analyses you need to have an Access Code. If you do not have an Access Code, please contact your local FinxS representative.

Access Code:

OK

Go to <https://www.finxs.com>. Type in newly edited/created Project/Access Code.

If it goes to the instructions page then you have an active Access Code.

[Change Language](#)

Taking the FinxS Behavioral Analysis will take about 10-15 minutes. Please ensure that you have that amount of time now to concentrate without interruptions. If not, please take the analysis later.

I will do it later

I will do it now



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+1.281.298.6073

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