Hello,

Here are a few simple instructions for the FinxS Admin Platform. The Client Resource Page (members.extendeddisc.org) has full instructions with power points and videos. If you have not registered for the site, please register for access.

Log on to https://www.finxs.com/users/sign_in

You will need your username and password to log on to the admin site. You can reset your password if you do not remember.

This document will assist you in:

1. **Reprinting an Individual Report**
2. **Printing a Work Pair Report**
3. **Printing a Team Report**
4. **Editing an Access Code**
5. **Creating an Access Code**

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If you need any additional help,

please email CustomerService@ExtendedDISC.org

or call 281-298-6073.

Thank you, Extended DISC!

1. <mark>Reprinting an Individual DISC Report</mark>

- From tabs at the top of your page, go to **Database** > **Individuals** <u>or</u> via the FinxS home screen, select **"Databases- Direct link to your database"**

- From here, **click "Behavioral Analysis"** on the left side of the screen
  - o Your database will appear in the middle of your screen.

- Search for the person by name or access code etc. using the search fields
  - o **Place a check mark by the person's/persons' name(s) you wish to reprint.**

- Scroll to the top or bottom of the page and Click on **"Print PDF"**

  - o An Option Box will open.

    <mark style="background-color:#00ff00">*IF SELECTING 1 PERSON:</mark>

    • **Choose Report Tool** as **"Behavioral Analysis Report"**

    <mark style="background-color:#00ff00">*IF SELECTING MULTIPLE PERSONS AT ONCE:</mark>

    • **Choose PDF TYPE** as **"Single person report"** or **"Single person reports – zipped"**

      - o Single person report- will print all results in one PDF file.
      - o Single person reports– zipped- will print each report in separate PDF files, in a zipped folder.

- **Choose Report Type** –
  - o Click the **"Choose Report"** box
  - o Select the report sub-topic to open your dropdown of reports
  - o Select the report needed
  - o Click **"Save"**

- **Choose "Method"** as either download or send email (if you choose download the file is downloaded to your computer, if you choose send email you will be prompted to type an email to send the report.)

*<mark style="background-color:#00ffff">*NOTE: IF SELECTING MULTIPLE PERSONS AT ONCE–</mark> You will be prompted to input Organization and Group Names. <u>This is not required</u> for single reports and will not be printed on the report itself.*

Click "OK" at the bottom and the report will be downloaded or emailed immediately.

2. <mark>Printing a Work Pair Report</mark>

- From tabs at the top of your page, go to **Database** > **Individuals** <u>or</u> via the FinxS home screen, select **"Databases- Direct link to your database"**

- From here, **click "Behavioral Analysis"** on the left side of the screen
  - Your database will appear in the middle of your screen.

- Search for the person by name or access code etc. using the search fields
  - **Place a check mark by each person's names you wish to add**

- After both names are checked, **click "Print PDF"**

  - An Option Box will open.

- **Choose PDF Type** as **"Multiperson Report"**

- **Choose Report Type** –
  - Click the **"Choose Report"** box
  - Select **"Teams/Work Pair"**
  - Select the Work Pair report needed
  - Click **"Save"**

- **Choose "Method"** as either download or send email (if you choose download the file is downloaded to your computer, if you choose send email you will be prompted to type an email to send the report.)

In the **"GROUP NAME"** field, type the name of the team
In the **"ORGANIZATION"** field, type the Organization name

Note: If you leave group name blank, it will not appear on the report. Organization name will always appear.

Click "OK" at the bottom and the report will be downloaded or emailed immediately.

3. <mark>Printing a Team Report</mark>

- From tabs at the top of your page, go to **Database** > **Individuals** <u>or</u> via the FinxS home screen, select **"Databases-Direct link to your database"**

- From here, **click "Behavioral Analysis"** on the left side of the screen
  - Your database will appear in the middle of your screen.

- Search for the person by name or access code etc. using the search fields
  - **Place a check mark by each person's names you wish to add**

- After all names are checked, **click "Print PDF"**
  - An Option Box will open.

- **Choose PDF Type** as **"Multiperson Report"**

- **Choose Report**–
  - Click the **"Choose Report"** box
  - Select **"Teams/Work Pair"**
  - Select the team report needed
  - Click **"Save"**

- **Choose "Method"** as either download or send email (if you choose download the file is downloaded to your computer, if you choose send email you will be prompted to type an email to send the report.)

In the **"GROUP NAME"** field, type the name of the team
In the **"ORGANIZATION"** field, type the Organization name

Note: if you leave group name blank, it will not appear on the report. Organization name will always appear.

Click "OK" at the bottom and the report will be downloaded or emailed immediately.

4. <mark>Editing an Access Code</mark>

- From tabs at the top of your page, go to **Projects** > **Behavioral Analysis** or via the FinxS home screen, select **"Projects- Direct link to managing your projects"**

- On the left-hand side of your screen you will see all of your Project Names listed.
    - You can change the Project Names to access codes by:
        - Clicking on the **"Project Name"** Field (located in the upper-left corner, under the FinxS logo) and changing to **Access Codes.**
        - Now the projects are listed by access codes.

- Click on the **Access Code/Project** you wish to update or change.
    - The details of that **Access Code/Project** will now appear in the middle of your screen.

- Once the appropriate Access Code/Project is selected, **scroll down** until you see an **"EDIT"** button in the lower-right corner.

- Click on **"EDIT"**

- Edit the information accordingly.

- Once the information is edited, **scroll down** until you see a **"SAVE"** button in the lower-right corner.

- Click on **"SAVE"** and the Access Code/Project has been updated.

5. <mark>Creating an Access Code</mark>

- From tabs at the top of your page, go to **Projects** > **Behavioral Analysis** <u>or</u> via the FinxS home screen, select **"Projects- Direct link to managing your projects"**

- In the **lower-left corner, click on the "+"** to create a new access code**.**

- **Complete the Following Fields:**
    - **Country -** Choose Country from Drop Down
    - **Organization -** Input Organization or Department Name
    - **Access Code -** 2 Parts **(ENG-Example)**
        - **Prefix (ENG) -** Select a Country Code, if options available (this should already be defaulted to your country code). Such as ENG, ECA, EUK etc.
        - **Suffix** After the dash in the access code– Up to 12 characters
    - **Name –** Type in the name of the project (this will show in the column on the left). The participant will not see this identifier.
    - **Name shown to respondent –** <mark>Suggest leaving this blank</mark>- whatever you enter here will be shown as the participant completes the questionnaire.
    - **Additional information–** <mark>Suggest leaving this blank</mark>-
    - **Send method** (3 Choices)
        - **None –** nothing sent
        - **Has answered – email -** email sent with no report attached
        - **PDF - Report** – **(Recommended)** Email sent with DISC report attached
    - **Choose Report Type** –
        - Click the **"Choose Report"** box
        - Select the report sub-topic to open your dropdown list of reports
        - Select the report needed
        - Click **"Save"**
    - **Language -** From the drop down choose the language for the report you wish to receive.

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WE SUGGEST YOU SKIP THE BLUE Highlighted Below

- o **Protect PDF attachment -** If you place a check mark, the Pdf will be sent locked and you will need a password to view the PDF.
- o **PDF attachment password** If you choose to protect the Pdf with a password you will need to create a password.
- o **Answering interface** Default Answering Interface
- o **Description** you may enter any notes about the access code or leave blank
- o **Research Module** - SKIP

- o **To:, Cc:, Bcc:** enter emails that you would like the results sent to (separate multiple emails with a **","**)
- o **Send to Respondent:** check box if you want a copy automatically sent to respondent

WE SUGGEST YOU SKIP THE BLUE Highlighted Below AND scroll down and click SAVE in the lower right corner and your access code is ready to be used

- o **Allowance Type** – (2 choices)
  - ▪ **Unlimited** suggested
  - ▪ **Limited** if you choose limited you can insert a number to limit the number of DISC for the access code
- o **Require Password –** (2 choices)
  - ▪ Yes
  - ▪ No
- o **First day open**
- o **Last day open**
- o **Status –** (3 choices)
  - ▪ Closed
  - ▪ Active
  - ▪ Pending

- o Click **"Save"**