

# Printing Team Reports

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# Team Reports: 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?](#)

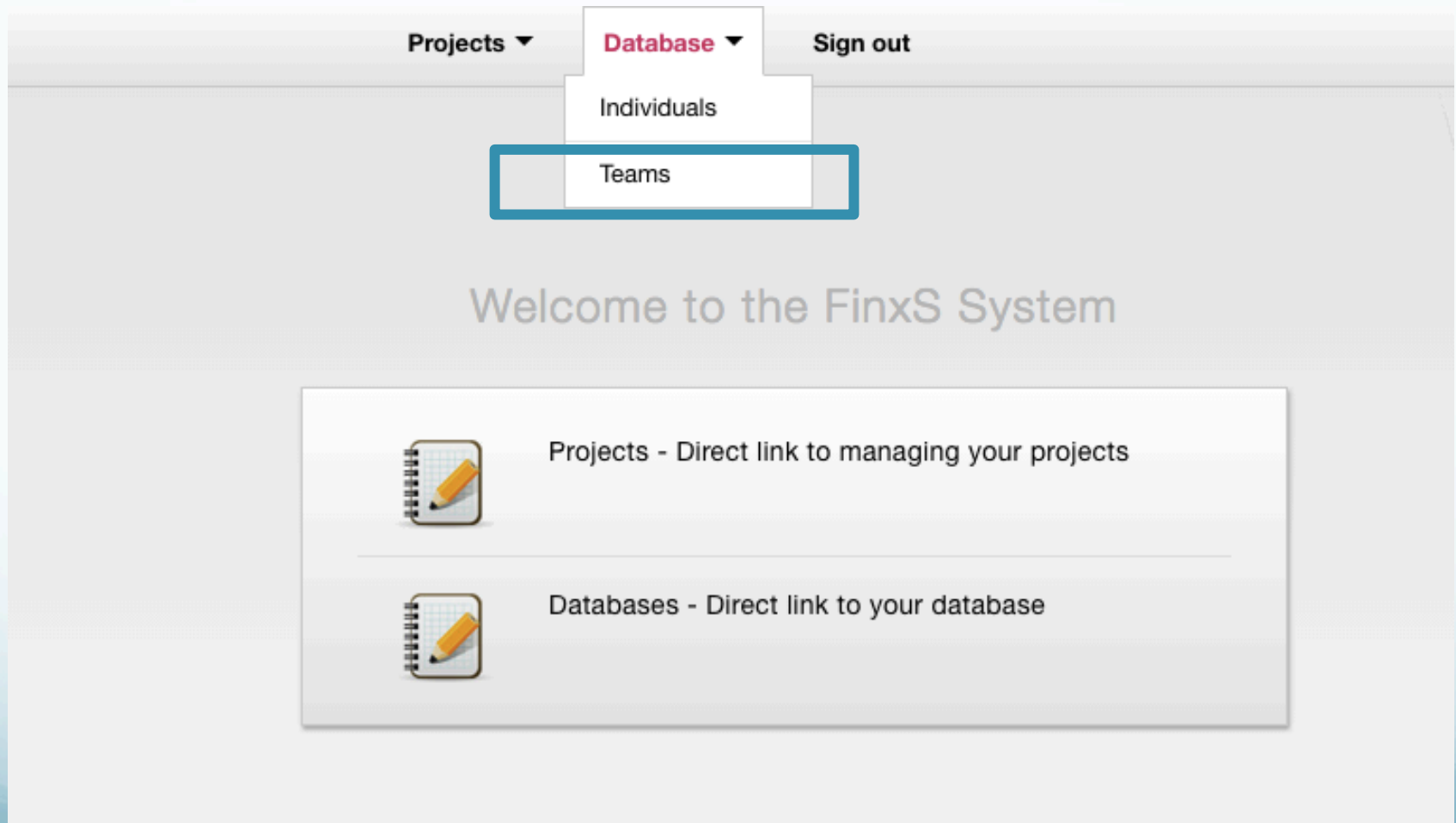
Submit

*\*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

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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 <button>Edit</button>
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
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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
------	---

# Team Database: New Team



## Team Database Confirmation

Team was created successfully



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

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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**

Projects ▾ Database ▾ Sign out

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 / 07.26.2016 18:01:31

# Team Database: Selecting Team Members



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

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Projects ▼ Database ▼ Sign out Language ▼ Prospect De

All Results

Teams Organization Chart Team Manager - Individuals Team Manager - Surveys

TEAMS

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

Select All / Deselect All Total results: 8 / 8

30 50 100

F: [ ] T: [ ]

			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 ☐

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Projects ▼ Database ▼ Sign out Language ▼ Prospect Demo

Teams Organization Chart Team Manager - Individuals Team Manager - Surveys

Clear the team (Team members: 8)

Select All / Deselect All Total results: 16 / 16

30 50 100 500

F:  T:

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

Team Sample

# Team Database: Ordering and Printing



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

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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.”**

Projects ▼ Database ▼ Sign out Language ▼ Prospect Demo ▼

Email has been sent x

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



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