



## Customization Tips for Your Extended DISC Reports

- Adding images to account
- Report Designer
  - Sections
  - Categories
  - Report title
  - Graphs

### Creating and Editing a Job Template

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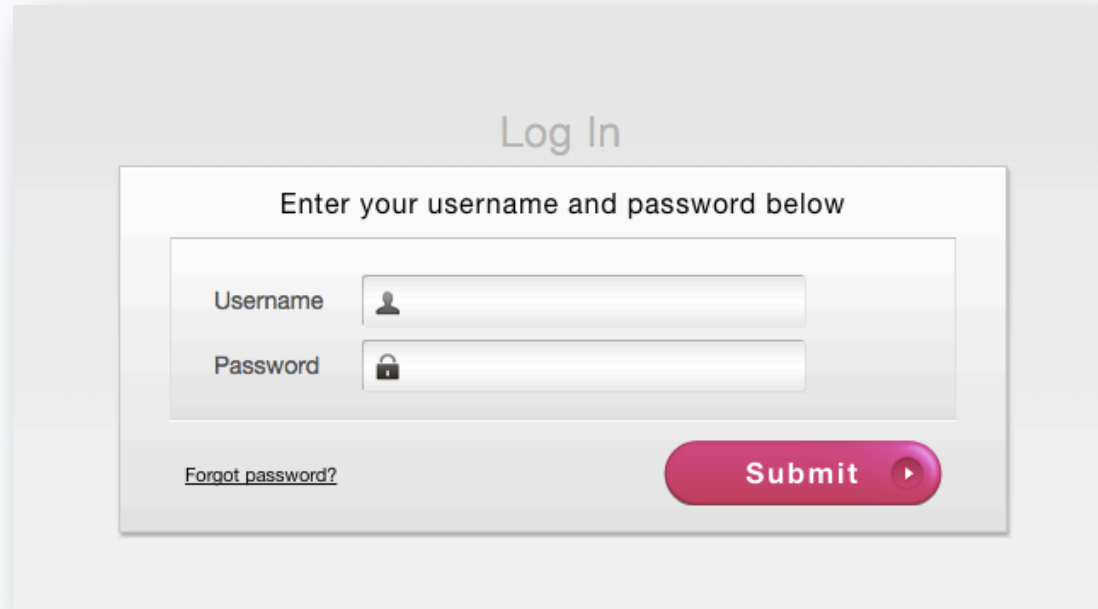
# Customization Tips: Getting Started



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

Enter your information:

- Username:
- Password:
- Click “Submit”



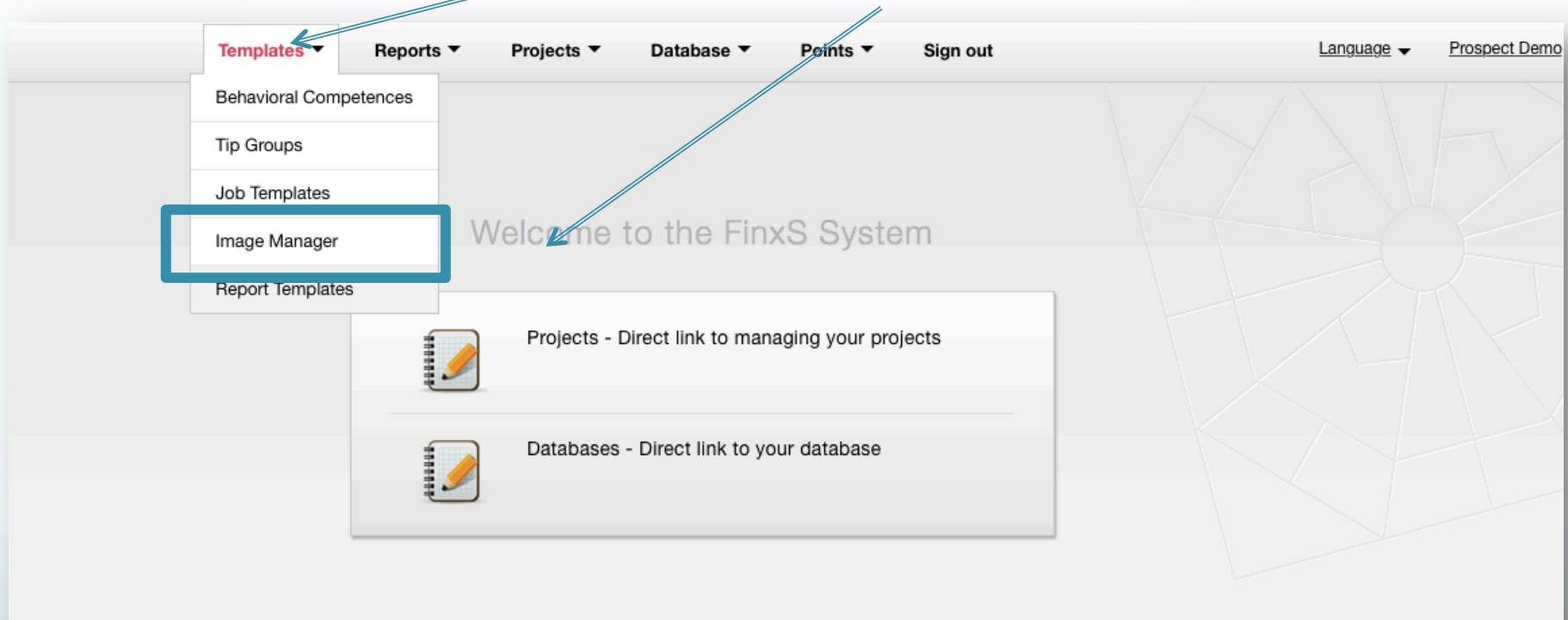
*\*If this is your first time to your user account you will need to accept the “Conditions for Use”*

Additional customization tips can be found in the **How to Add a Logo to your report** and **How to Create a Job Template** tutorials on our VIP Client Resource Site.

# Image Manager: Adding images to reports



- Upload an image into the system to insert into report. To do this, from main menu tabs click on **Templates** and choose **Image Manager**



**Note:** Contact us if you need access to Image Manager

# Image Manager: Adding images to reports



- To upload a new image, click on the “+” sign in the bottom left corner
- Fill in the **Name** (required) of the image and **Description** (optional)
- Click on **Choose File** and select the image to upload
- Press **Save** to add to your Image Manager Library. Use the Report Designer to insert image into report or Report Template to insert onto a report cover

IMAGE MANAGER

Bigstock-portrait-of-dentist-and-dent  
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"/>

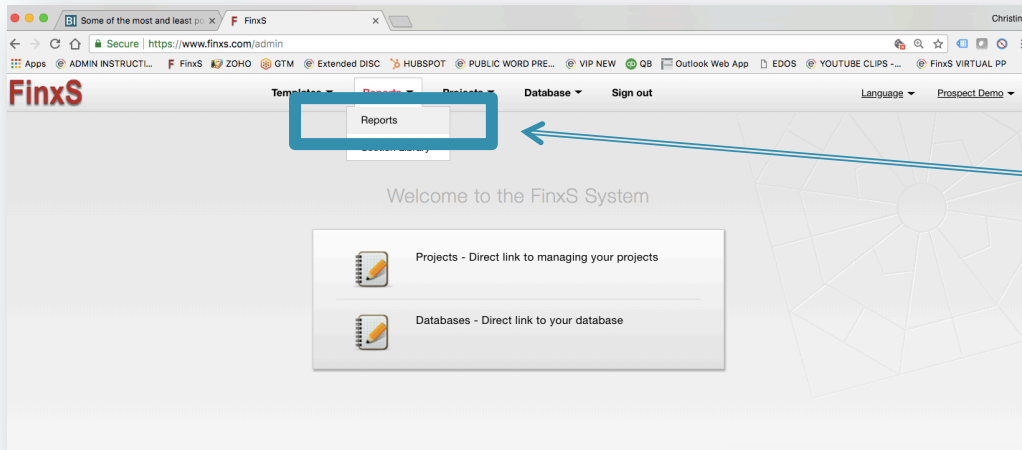
**Note:** Image must be 900Kb or smaller and in .png or .jpeg format

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# Report Designer – to Edit a report

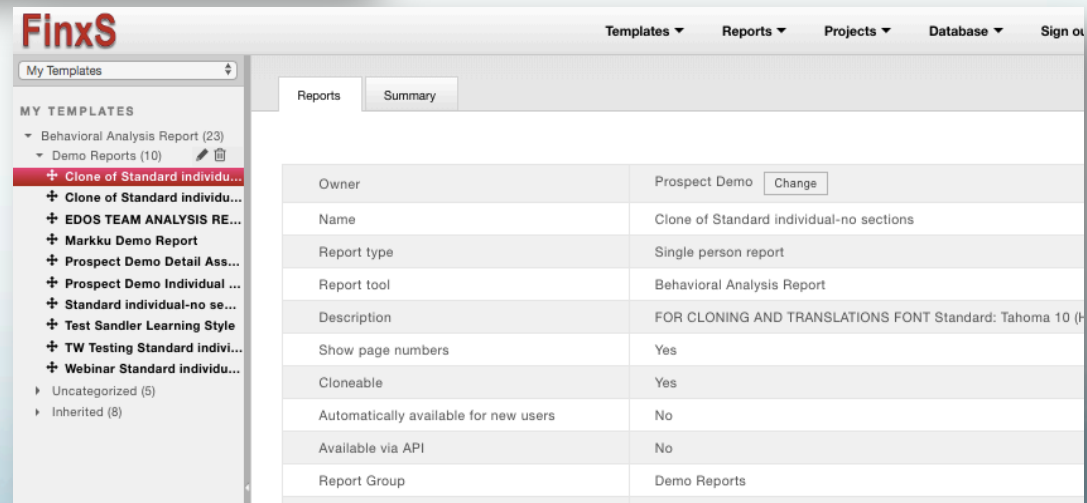


- The Report Designer is the place to customize your report; it places a specific field in the Report (e.g., text, image, space) by drag-and-dropping it to appropriate place.



- From top menu tabs click on **Reports** and choose **Reports** from pull down menu

- Select and highlight the report from “My Template” to edit



# Report Designer – to Edit a report



FinxS

Templates ▼ Reports ▼ Projects ▼ Database ▼ Sign out

Language ▼ Prospect Demo ▼

My Templates

MY TEMPLATES

- Behavioral Analysis Report (23)
- Demo Reports (10)
- + Clone of Standard individual...
- + Clone of Standard individual...
- + EDOS TEAM ANALYSIS RE...
- + Markku Demo Report
- + Prospect Demo Detail Ass...
- + Prospect Demo Individual ...
- + Standard individual-no se...
- + Test Sandler Learning Style
- + TW Testing Standard indivi...
- + Webinar Standard indivi...
- Uncategorized (5)
- Inherited (8)

Reports Summary

Owner	Prospect Demo <a href="#">Change</a>
Name	Clone of Standard individual-no sections
Report type	Single person report
Report tool	Behavioral Analysis Report
Description	FOR CLONING AND TRANSLATIONS FONT Standard: Tahoma 10 (Headings Blue 12) NO SECTIONS
Show page numbers	Yes
Cloneable	Yes
Automatically available for new users	No
Available via API	No
Report Group	Demo Reports
Languages available	English (US), Spanish (Latin America)
Default Language	English (US) (Change in Report Designer)
Created / Updated	04.13.2017 16:21:58 / 05.30.2018 16:17:12
Usage rights	1 user <a href="#">Edit</a>
Report Template the report is based on	<a href="#">Green Tip Tahoma Font Template</a>
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>
	Cover Page & Content Pages

[Report Designer](#) [Review](#) [Edit](#) [Clone](#)

• Select report from “My Templates” then “Report Designer”



**Tip:** Clone the original report you want to make edits to; many of the changes/edit you make in Report Designer **CANNOT** be undone.

# Report Designer – Sections



- The reports are divided into different sections. It can be one or multiple pages in length. In multi person reports you may not know the exact length of a section because it depends on the number of people in the Report. A section is always followed by page break.
- Click on the Section you want to edit from right column (e.g., INTRO, PROFILES, etc.)

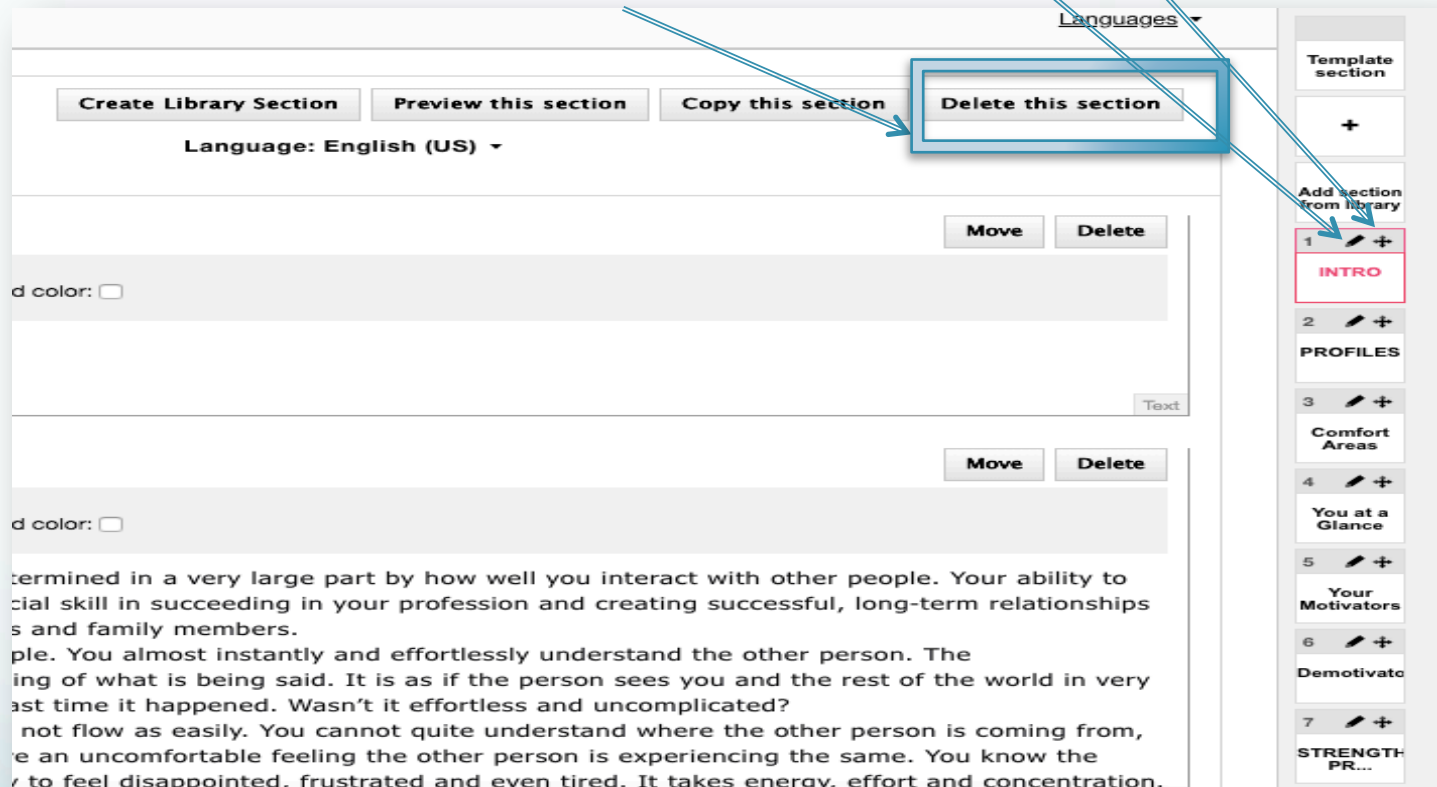


Grayed out Sections are section templates and cannot be directly edited. You will need to make edits in your Section Library or contact us to request no sections report.



## Report Designer: Moving and deleting a Section

- To move a section click and drag the “+” on the Section up or down.
- To edit the Section title, click on the pencil icon on the Section.
- To delete an entire section click on “Delete this section”. It CANNOT be undone.



**TIP:** Use **Preview** or **Preview this section** after any edits to clearly see final report appearance.



# Report Designer – to Edit Text



- To edit text, click on Text Box and edit text box field will appear. Make edits and click “Save”

Font Family ▾ Font Sizes ▾ **B** *I* U [List Icons] [Color Icon] [Bullet Icon] [Numbered Icon] [Undo] [Redo]  $\times_2$   $\times^2$  First name Last name Full name

**The DISC Behavioral Styles - The Key points:**

In the following pages you will learn about the four DISC-styles. As you get comfortable with their own unique traits and tendencies, please keep the following important points in mind:

- None of the styles are better or worse.
- All styles have strengths and development areas. They just happen to be different.
- Your style does not limit what you can accomplish or how successful we can be. It simply predicts how you tend to do things.
- You can find all of the four styles represented by very successful people. However, the most successful people know who they are. They modify their style

**Save** **Cancel**

Text

- Use the tool bar to edit font, font size, color, alignment etc.
- You can insert name field into text; system will automatically insert individual's name

Tahoma ▾ 12pt ▾ **B** *I* U [List Icons] [Color Icon] [Bullet Icon] [Numbered Icon] [Undo] [Redo]  $\times_2$   $\times^2$  First name Last name Full name

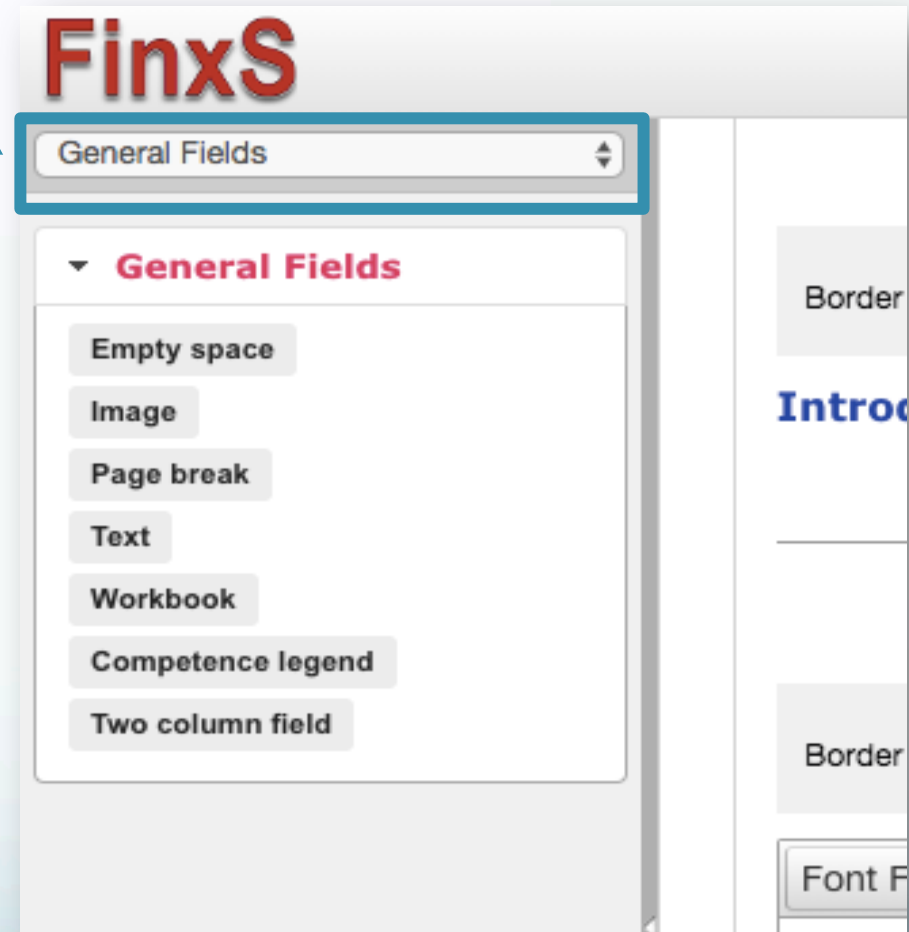
**Very Brief Background of the Extended DISC® Model**

**Save** **Cancel**

# Report Designer – Categories



- Report Designer categories can be chosen from the pull down menu in the upper left corner. They are used to add additional content and data to a report.
- Categories include:
  - General Fields (e.g., spacing, image, text, etc.)
  - Behavioral Descriptors
  - Graphics (e.g., profile and Diamonds)
  - Behavioral Competences
  - DISC (non-graphical)





# Report Designer: Changing Title of Report

- In Report Designer, click on “Template section” from Sections (right column)
  - Click on **Cover section header title** to edit title of cover page
  - Click on over **Cover section header text** to edit text of the cover page below the title.
  - Click on **Content page header title** to edit title of content pages.
- Press **Save** and **Preview**

The screenshot shows the FinxS Report Designer interface. The top navigation bar includes 'Templates', 'Reports', 'Projects', 'Database', and 'Sign out'. The right sidebar shows the 'Template section' selected, with a list of sections: 'INTRO', 'PROFILES', 'Comfort Areas', 'Your Motivators', and 'Demotivate'. The main preview area shows the report content. Arrows from the instructions point to the following fields:

- Cover section header title:** Individual Assessment
- Cover section header text:** This assessment is based on the responses given in the Extended DISC® Individual Assessment Questionnaire. This assessment should not be the sole criterion for making decisions about oneself. The purpose of this assessment is to provide supporting information for the respondent in self-development
- Content page header title:** Individual Assessment

**TIP: Use **Preview** after saving any edits to see final report appearance**

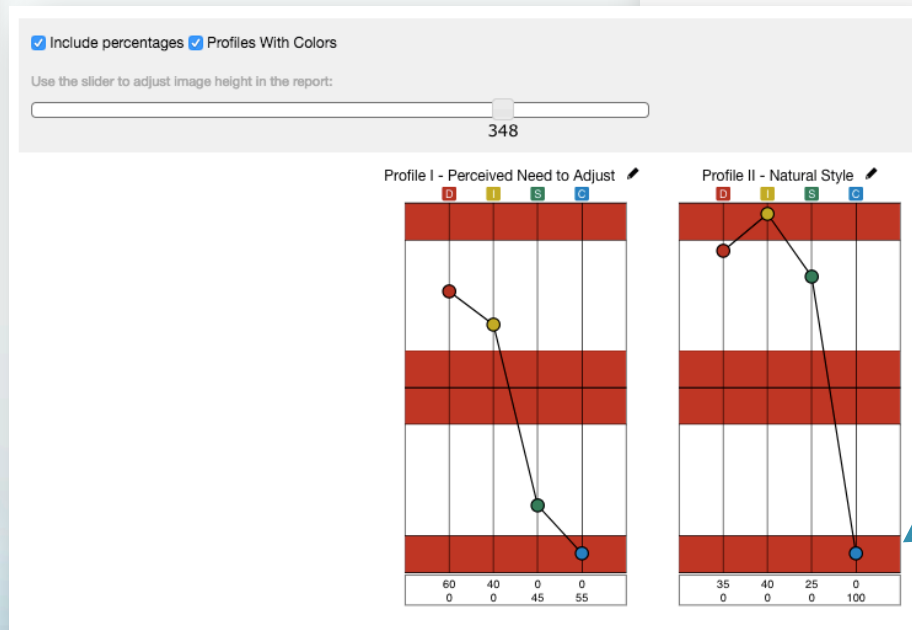
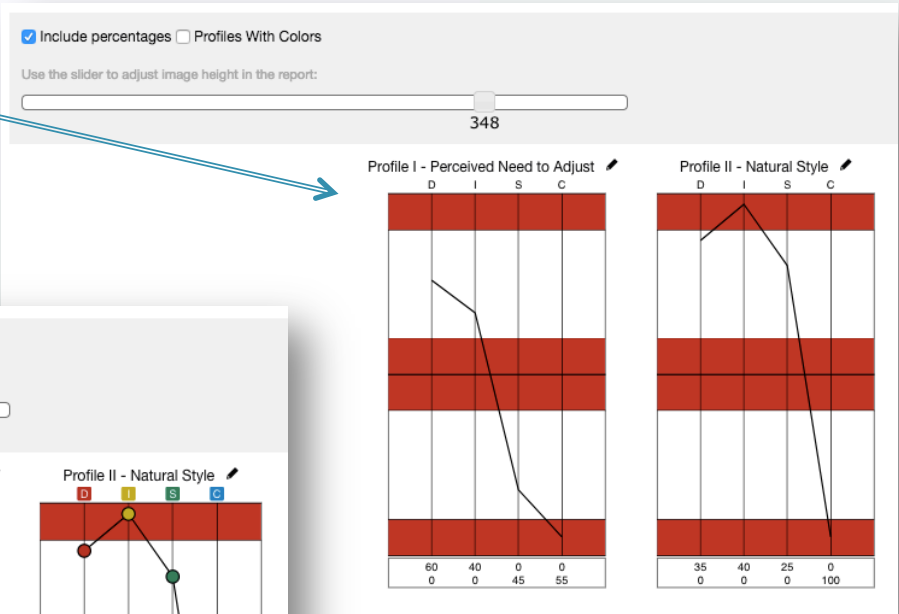
# Report Designer: Adding DISC Colors to Profiles



- Click on **Profiles** section from right column
- Check **Profiles with Colors** to add color or uncheck to remove colors



NO COLOR



COLOR

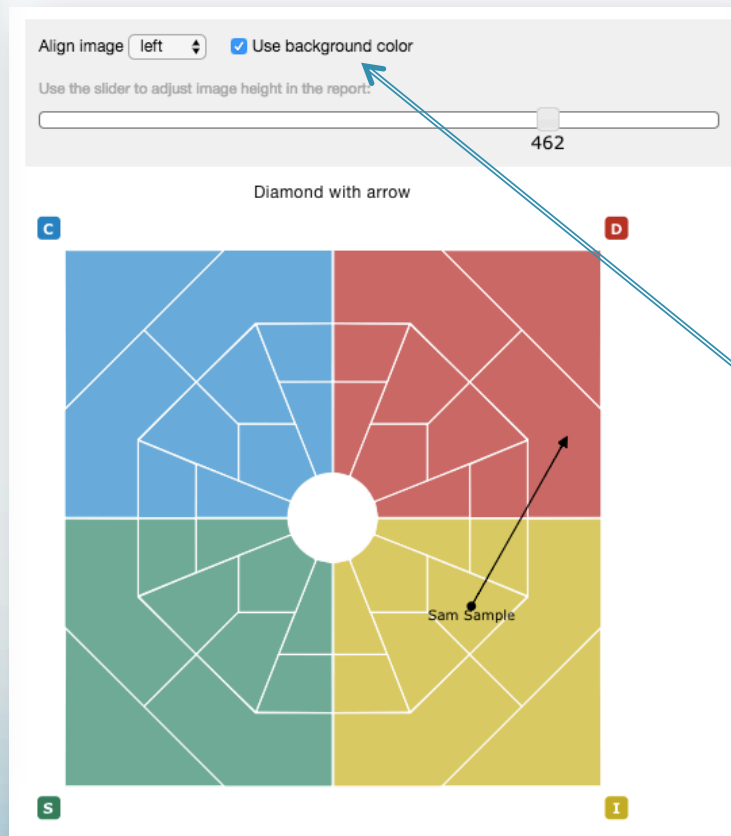
# Adding DISC Colors Report Profiles



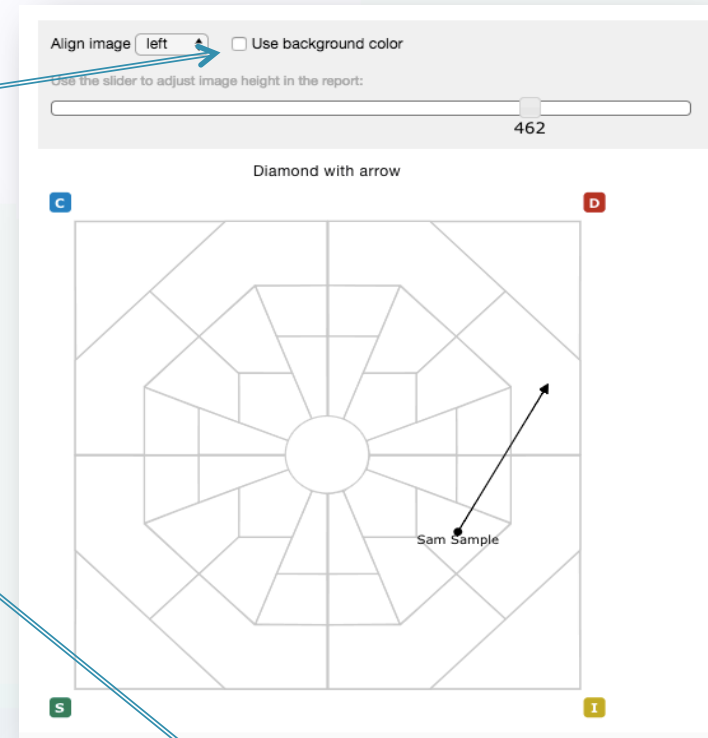
- Click on Comfort Areas or Section with Diamond
- Check or uncheck **Use Background Color**



NO COLOR



COLOR





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

For questions and additional tips:

### **Extended DISC VIP Client Resource Site**

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