Creating and Editing Projects (Access Codes)

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"

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

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.
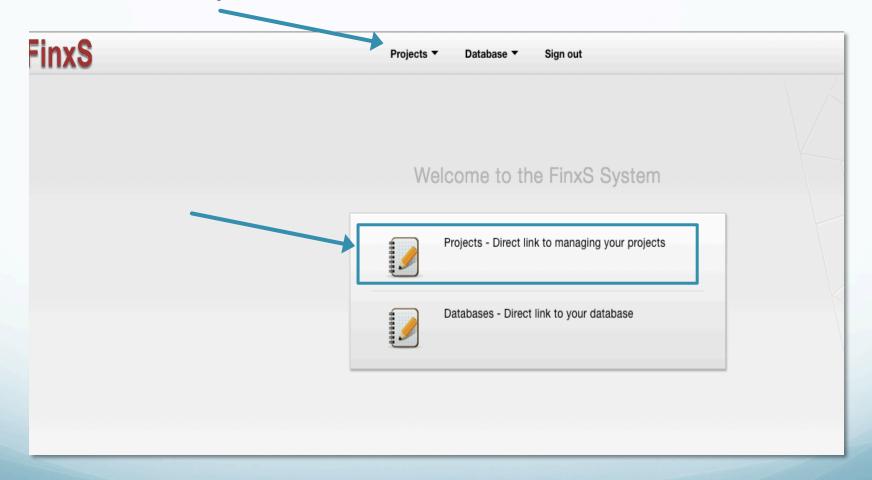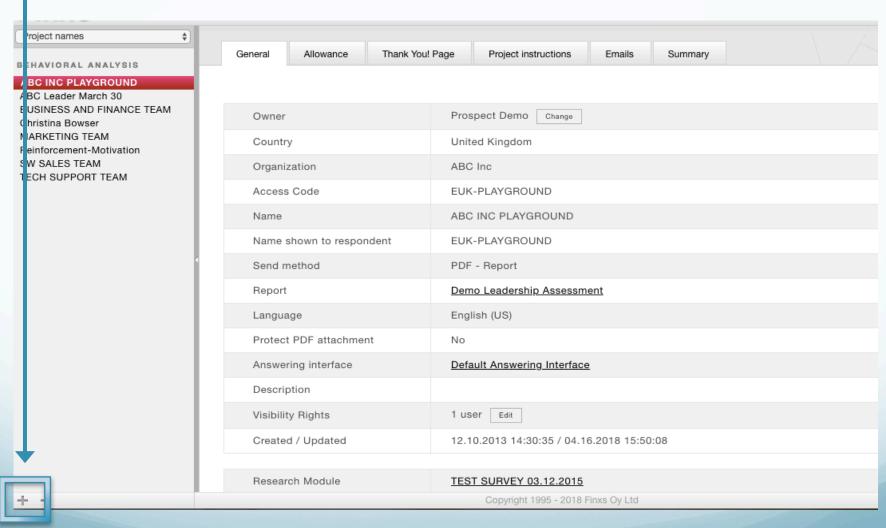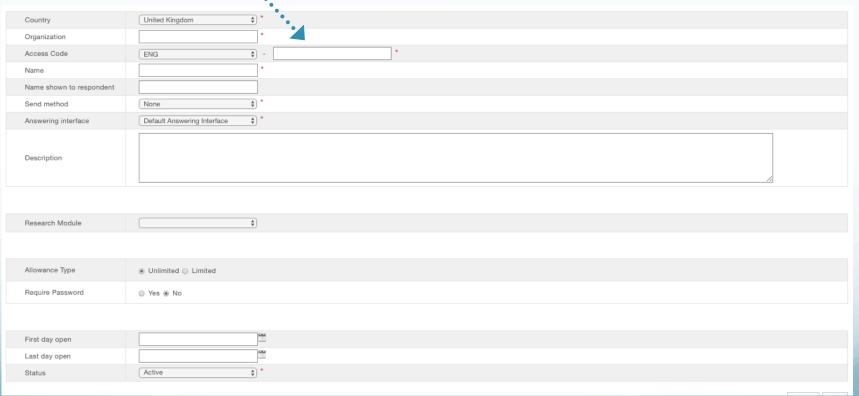 - Type code in blank field (no more than 12 characters – no symbols) e.g., EUK-AcmeInc16
  - New Access Code must be unique from any existing code in our FinxS System
- **Name:** Type the Name of the Project/Access Code (e.g., Acme Inc Sales Dept) – Appears in left column
- **Name shown to respondent:** OPTIONAL, anything you enter here will appear above every question on the questionnaire

Country	United Kingdom
Organization	
Access Code	ENG -
Name	
Name shown to respondent	
Send method	None
Answering interface	Default Answering Interface
Description	
Research Module	
Allowance Type	⦿ Unlimited ○ Limited
Require Password	○ Yes ⦿ No
First day open	
Last day open	
Status	Active

Project/Access Code: Creating a new Access Code

- **Send Method**: Select **"PDF - report"**
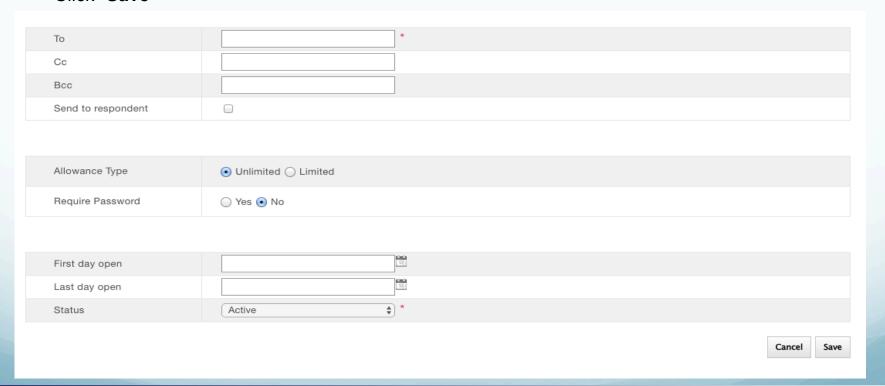- **Report:** Choose report you want linked to this Access Code (e.g., ABC Inc Sales Report)
- **Protect PDF attachment:** Optional, Check box if you would like additional security. Will require a password to open the respondents report from the email.
- **PDF attachment password:** If you chose to Protect 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	☐	
PDF attachment password		
Answering interface	Default Answering Interface	*
Description		
Research Module		

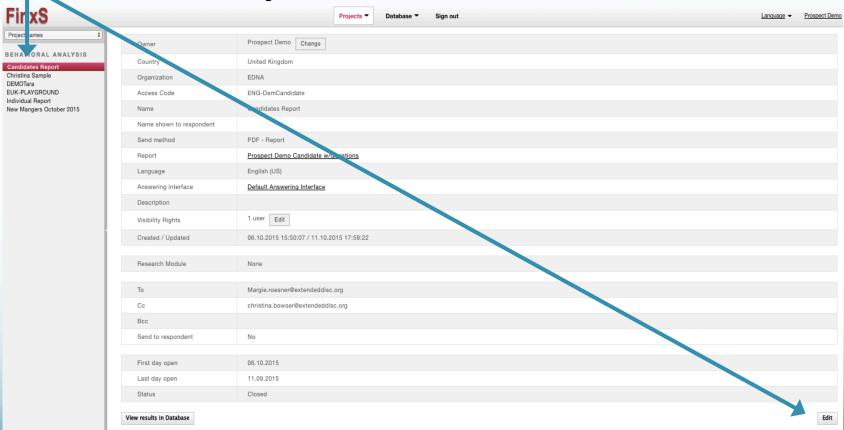# Project/Access Code: Creating a new Access Code

- **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		*
Cc		
Bcc		
Send to respondent	☐	

| Allowance Type | ● Unlimited ○ Limited |
| Require Password | ○ Yes ● No |

First day open		
Last day open		
Status	Active ▲▼	*

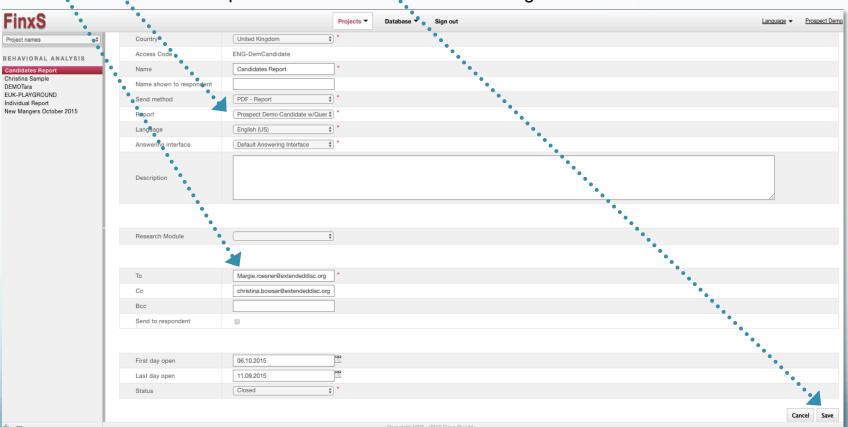Cancel   Save

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

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"**)
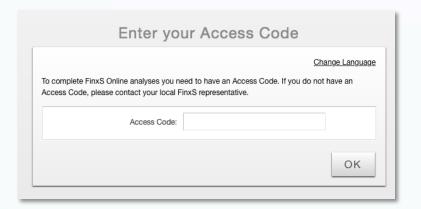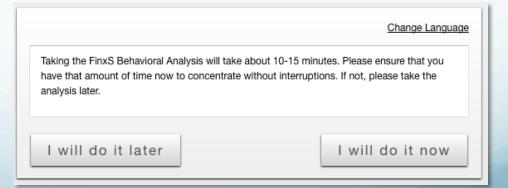- When edits are completed click on "**Save**" in the lower right corner.

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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