



Creating and Editing a Job Template

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Getting Started



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

Enter your information:

- Username:
- Password:
- Click “Submit”

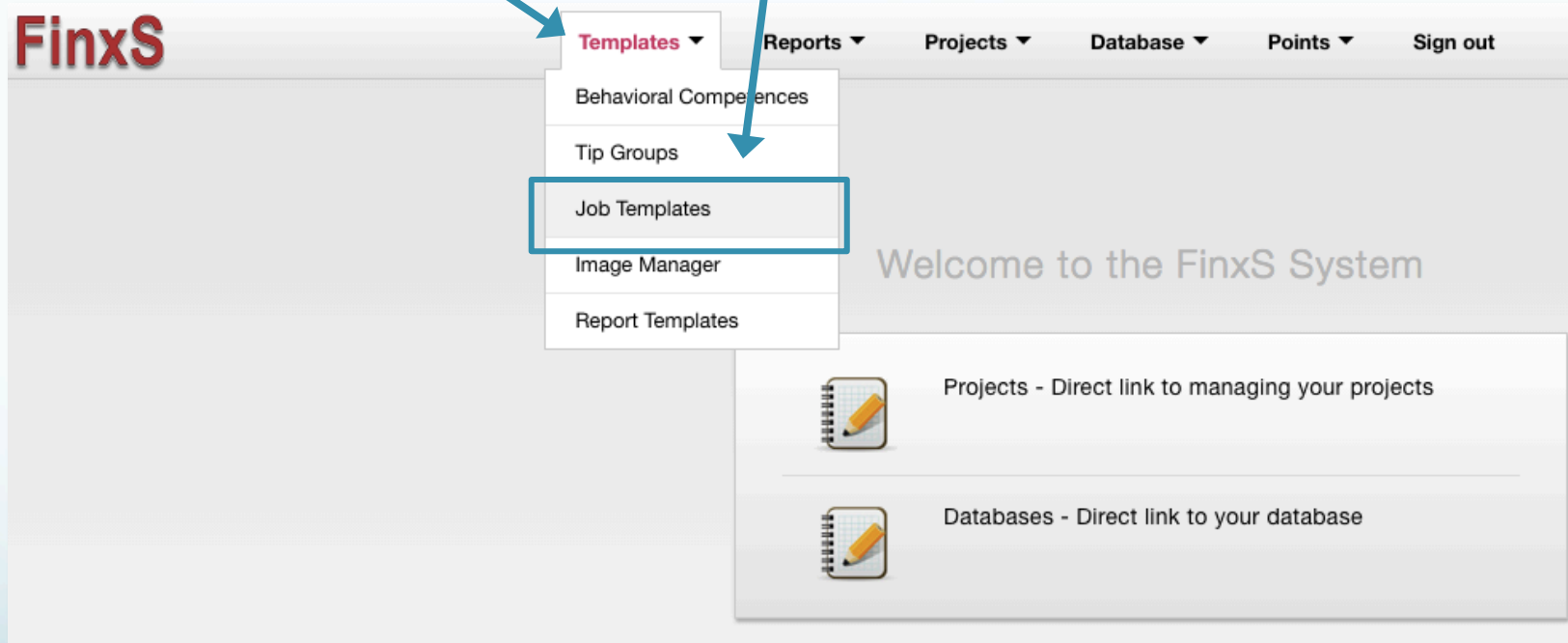
A screenshot of a web login interface. At the top, the text 'Log In' is displayed in a light gray font. Below it, a white box contains the instruction 'Enter your username and password below'. There are two input fields: 'Username' with a person icon and 'Password' with a lock icon. A link for 'Forgot password?' is located below the password field. A red 'Submit' button with a right-pointing arrow is positioned at the bottom right of the form.

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

Job Template: Creating a new Job Template



- From main menu click on **Templates** tab then **Job Templates** (from pull-down menu)



Job Template: Creating a new Job Template



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

The screenshot shows the FinxS web application interface. At the top, there is a navigation bar with the FinxS logo and menu items: Templates, Reports, Projects, Database, Points, Sign out, and Language. Below the navigation bar, there is a search bar and a sidebar with a list of templates. The main content area displays the configuration for a job template named "ABC Inc Problem Solvers".

Job Template Configuration:

Owner	Prospect Demo <input type="button" value="Change"/>
Name	ABC Inc Problem Solvers
Description	ABC Inc Problem Solvers
Cloneable	No
Automatically available for new users	No
Usage rights	1 user <input type="button" value="Edit"/>
Created / Updated	07.27.2016 17:25:49 / 07.27.2016 17:25:49
Associations	The Job Template is currently associated with the following resources: ▶ Reports (0)

Competence Name	Expected value
Persistent solving of difficult logical problems	5
Analyzing strong and weak approaches to a problem	5
Coming up with new solutions to technical problems	5

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Job Template: Creating a new Job Template



Complete the following fields:

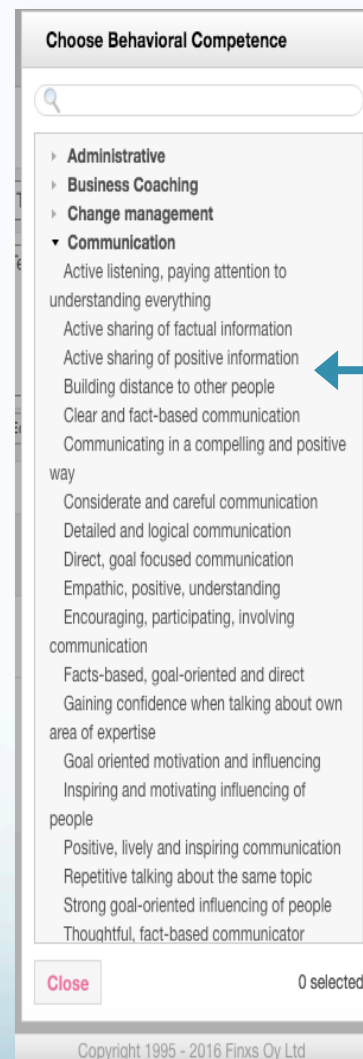
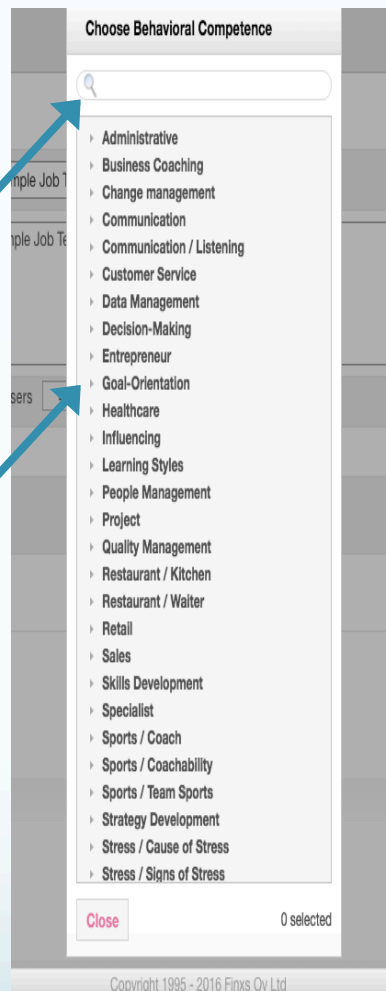
- **Name:** Name the template (the position you are creating it for or the types of behaviors you will be selecting)
- **Description:** (optional) write in description
- Leave other settings blank
- Click on **Add Competence**

Job Templates	
Name	<input type="text"/>
Description	<input type="text"/>
Usage rights	0 users <input type="button" value="Edit"/>
Cloneable	<input type="checkbox"/>
Automatically available for new users	<input type="checkbox"/>
Make available for all users	<input type="checkbox"/>
<input type="button" value="Cancel"/> <input type="button" value="Add Competence"/> <input type="button" value="Save"/>	

Job Template: Creating a new Job Template



- **Choose Behavioral Competences** pop up screen will appear with the lists of categories
 - Type in a key word in the search box above to search through all categories
 - Click the Arrow next to the category to view the behaviors



- Select the behaviors you would like added to your job template by just clicking on the behavior
- A “√” will appear next to selected behavior(s)
- Once you have selected all of the behaviors, click on **Close**
- Click on **Save**



Job Template: Creating a new Job Template



- All behavioral competence selected are now listed. Press “Save”.
- **OPTIONAL:** To create a job analysis, you can insert an Expected Value for each behavioral competence. Insert numbers between -5 to 5 to view the match percentage of your Expected Value to the participants value.

	Competence Name	Expected value
+	Complex selling that requires custom product solution	<input type="text" value="5"/> ×
+	Engaging the buyer; relationship selling	<input type="text" value="5"/> ×
+	Inspired image-selling	<input type="text" value="5"/> ×
+	Selling complicated solutions requiring product expertise	<input type="text" value="5"/> ×
+	Selling the idea to people that they need a change	<input type="text" value="5"/> ×
+	Short-term selling; inspiring and motivating buyers quickly	<input type="text" value="5"/> ×

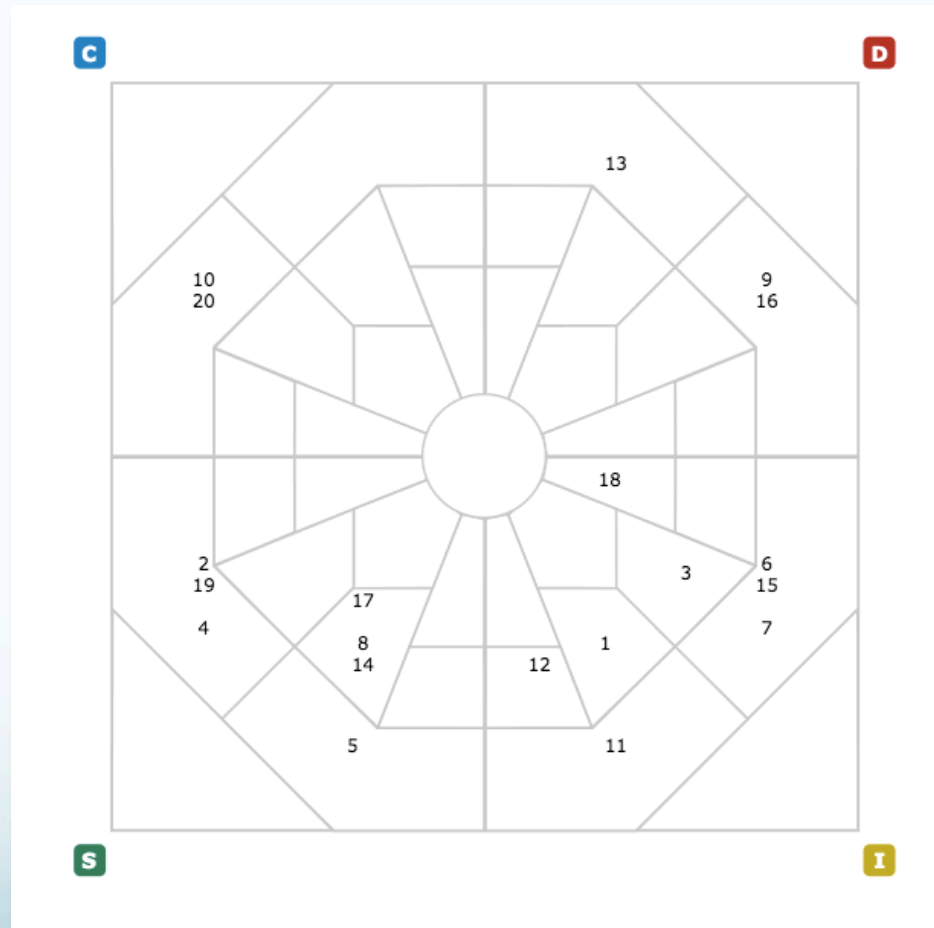


TIP: Expected Values should most likely be +5 since these are the competences that you selected as important.

Job Template: Creating a new Job Template



- Once you hit “Save” an Extended DISC Diamond will identify the location for each behavioral competence chosen.



Job Template: Editing



- To insert into a new report section, click on **Reports** tab – **Section Library** (from pull-down menu)

The screenshot shows the FinxS web application interface. The top navigation bar includes 'Templates', 'Reports', 'Projects', 'Database', 'Points', and 'Sign out'. The 'Reports' dropdown menu is open, showing 'Section Library' as the selected option. The main content area displays details for a 'Sample Job Template'.

Owner	Prospect Demo <input type="button" value="Change"/>
Name	Sample Job Template
Description	Sample Job Template for User Manual
Cloneable	No
Automatically available for new users	No
Usage rights	1 user <input type="button" value="Edit"/>
Created / Updated	08.17.2016 19:27:14 / 08.17.2016 19:27:14
Associations	The Job Template is currently associated with the following resources: ▶ Reports (0)

Competence Name	Expected value
Clear and fact-based communication	0
Direct, goal focused communication	0
Encouraging, participating, involving communication	0
Being a catalyst for thoughtful and appropriate change	0

Job Template: Inserting into Section



- Click on **My Sections** and change to **System Sections**
- Select the section titled, **BEHAVIORAL COMPETENCIES TEMPLATE** and press **Clone** at the bottom

The screenshot shows the FinxS web application interface. The top navigation bar includes 'Users', 'Templates', 'Reports', 'Projects', 'Database', 'Points', 'Sign out', 'Language', and 'Prospect Demo'. The left sidebar shows a tree view of 'System Templates' with 'BEHAVIORAL COMPETENCIES ...' selected. The main content area displays the details of the selected template in a table format.

Owner	United Kingdom
Name	BEHAVIORAL COMPETENCIES TEMPLATE
Description	Tahoma 10 Blue Tahoma 12 Headers
Report type	Single person report
Report tool	Behavioral Analysis Report
Languages available	English (UK), English (US)
Cloneable	Yes
Usage Rights	1218 users
Automatically available for new users	Yes
Created / Updated	10.14.2016 15:07:37 / 10.17.2016 20:38:42
Associations	The Report Section is currently associated with the following resources: ▶ Reports (0)

At the bottom right of the table, there are two buttons: 'Clone' and 'Inherit'. A dotted blue arrow points from the 'Clone' button back to the 'BEHAVIORAL COMPETENCIES TEMPLATE' entry in the table.

Job Template: Inserting into Section



- Rename and press **Save**

The screenshot shows the 'Section' configuration page in the FinxS system. The page has a navigation bar with 'Users', 'Templates', 'Reports', 'Projects', 'Database', 'Points', and 'Sign out'. The 'Section' page includes a sidebar with 'System Sections' and a list of sections. The main content area shows the configuration for a section named 'Clone of BEHAVIORAL COMPETEN'. The configuration includes fields for Owner, Name, Description, Report type, Report tool, Cloneable, Automatically available for new users, Make available for all users, and Usage Rights. The 'Save' button is located at the bottom right of the configuration area.

Owner	Prospect Demo
Name	Clone of BEHAVIORAL COMPETEN *
Description	Tahoma 10 Blue Tahoma 12 Headers *
Report type	Single person report ▾
Report tool	Behavioral Analysis Report ▾
Cloneable	<input checked="" type="checkbox"/>
Automatically available for new users	<input checked="" type="checkbox"/>
Make available for all users	<input type="checkbox"/>
Usage Rights	0 users <input type="button" value="Edit"/>

Job Template: Inserting into Section



- Go back from **System Templates** to **My Templates** (under FinxS Logo)
- Select the section you just created on the left-hand column and press **Section Designer**

The screenshot shows the FinxS web application interface. The top navigation bar includes 'Users', 'Templates', 'Reports', 'Projects', 'Database', 'Points', 'Sign out', 'Language', and 'Prospect Demo'. The left-hand column shows 'MY SECTIONS' with 'Job Behavioral Competencies' and 'Sample Accounting Behavioral C...' selected. The main content area displays the 'Section Designer' for a job template. The table below shows the details of the section.

Section	Summary
Owner	Prospect Demo <input type="button" value="Change"/>
Name	Sample Accounting Behavioral Competencies
Description	Tahoma 10 Blue Tahoma 12 Headers
Report type	Single person report
Report tool	Behavioral Analysis Report
Languages available	English (UK), English (US)
Cloneable	Yes
Usage Rights	1 user <input type="button" value="Edit"/>
Automatically available for new users	Yes
Created / Updated	10.17.2016 21:45:40 / 10.17.2016 21:45:40
Associations	The Report Section is currently associated with the following resources: ▶ Reports (0)

At the bottom of the section designer, there are buttons for 'Section Designer', 'Preview', 'Edit', and 'Clone'.

Job Template: Inserting into Section



- Click on the drop-down, and select **Job Templates**
- Click on the Job Template you just created and drag and drop it right below the Competence Legend Section

The screenshot shows the FinxS web application interface. At the top, there is a navigation bar with dropdown menus for Users, Templates, Reports, Projects, Database, Points, and Sign out. On the right side of the navigation bar, there are options for Language and Prospect Demo. A left-hand sidebar contains a menu with the following items: General Fields, Behavioral Descriptors, Graphics, DISC, Behavioral Competences, Job Templates (highlighted in blue), Tip Groups, Benchmarks, and Validity Fields. Below this menu are sections for Text, Workbook, Competence legend, and Two column field. The main content area displays a template editor. It features two language selection dropdowns, both set to 'English (US)'. Below these are 'Move' and 'Delete' buttons. A text input field is visible with 'Border width: [] px', 'Border color: []', and 'Background color: []'. The main text area contains a blue heading: **{{first_name}}'s (INSERT) Style**. The text below reads: 'We all have our own unique style. When we become more aware of how we tend to do things it becomes easier to make conscious changes to our style. These modifications improve our effectiveness with others.' This is followed by a bolded section: **Interpreting the bar graphs is simple:**. The text continues: 'The **rectangles to the right side** of the graph identify your preferred behaviors. Be conscious not to overuse them. The **rectangles to the left side** of the graph identify behaviors that may require more energy and concentration from you.' Below this text is another 'Text' label. Further down, there is a 'COMPETENCE LEGEND' section with a description: 'This field will be positioned exactly above or below a competence graph.' It also includes 'Border width: [] px', 'Border color: []', and 'Background color: []' fields. At the bottom, there are two lines of text: 'Not Natural' and 'Natural to your style'. A 'Competence legend' label is at the bottom right. A blue dotted arrow starts from the 'Job Templates' menu item and points down to the 'COMPETENCE LEGEND' section.

Job Template: Inserting into Section



OPTIONAL: You can choose to “Print all”, “Print top”, or “Print bottom”. “Print top” will show the top behavioral competences in the Job Template that are the most comfortable for the individual. “Print bottom” will show the behavioral competence that are the least comfortable for the individual

Print all behavioral competences with match percentages between [] and [] .

- Print all
- Print top
- Print bottom

Complex selling that requires custom product solution:	-5	-4	-3	-2	-1	0	1	2	3	4	5	80%
Engaging the buyer; relationship selling:	-5	-4	-3	-2	-1	0	1	2	3	4	5	80%
Inspired image-selling:	-5	-4	-3	-2	-1	0	1	2	3	4	5	80%

OPTIONAL: If expected values are being used, you can choose to view behavioral competences “with all match percentages” or “with match percentage between”. If the latter is chosen, insert a number, 0-100, in the two blanks to only view the behavioral competences that has a match percentage between those two numbers.

Print all behavioral competences with match percentages between [] and [] .

Selling BC

Complex selling that requires custom product solution:	-5	-4	-3	-2	-1	0	1	2	3	4	5	80%
Engaging the buyer; relationship selling:	-5	-4	-3	-2	-1	0	1	2	3	4	5	80%
Inspired image-selling:	-5	-4	-3	-2	-1	0	1	2	3	4	5	80%

“Match Percentages” identify behavioral competences that fall within a pre-selected range (between 0 – 100%)

Job Template: Inserting into Section



- Be sure to update the title of this page in the first section! Remove “(Insert)” and add the title of the job template. (Font of title should be Tahoma, 12pt, Bold and dark blue to match other titles in reports)
- Click on “Save” under the text box after you make you changes.
- This is now a new section that can be added to any of your reports.

Move Delete

Border width: px Border color: Change Background color:

{{first_name}}'s (INSERT) Style

We all have our own unique style. When we become more aware of how we tend to do things it becomes easier to make conscious changes to our style. These modifications improve our effectiveness with others.

Interpreting the bar graphs is simple:

The **rectangles to the right side** of the graph identify your preferred behaviors. Be conscious not to overuse them.

The **rectangles to the left side** of the graph identify behaviors that may require more energy and concentration from you.

Text

Move Delete

COMPETENCE LEGEND This field will be positioned exactly above or below a competence graph.

Move Delete

Job Template: Inserting Section into Reports



- To pull your reports up, go to **Reports** tab – **Reports** (from pull-down menu)
- Click on the arrow next to **Behavioral Analysis** and select the report you would like to insert the Job Template section. Click on **Report Designer**.

The screenshot shows the FinxS web application interface. The top navigation bar includes 'Users', 'Templates', 'Reports', 'Projects', 'Database', 'Points', and 'Sign out'. The 'Reports' dropdown menu is open, showing 'Reports' and 'Section Library'. The main content area displays a report configuration page for 'Demo Leadership Assessment'. The page includes a table with the following rows:

Description	Personal Assessment with Tips FONT Standard: Tahoma 10 (Headings Blue 12) 29 pages *Intro to Your Assessment (Section Library (SL) *Profiles (SL) *Comfort Areas *You at a Glance (SL) *Your Motivators (SL) *Demotivators (SL) *Communication Style *Decision Making *Relationship Roles (SL) *TIPS: Identifying others' styles (SL) *TIPS: Other's Styles (SL) *Personal Action Plan (SL)
Show page numbers	Yes
Cloneable	Yes
Automatically available for new users	No
Report Group	
Languages available	English (US)
Default Language	English (US) (Change in Report Designer)
Created / Updated	01.22.2016 20:25:22 / 10.14.2016 14:20:30
Usage rights	0 users <input type="button" value="Edit"/>
Report Template the report is based on	Blue Leadership Assessment Tahoma Font Template
Associations	The Report is currently associated with the following resources: <ul style="list-style-type: none">▶ Behavioral Analysis projects (2)▶ Reasoning projects (0)
Print type	Cover Page & Content Pages

At the bottom of the page, there are buttons for 'Report Designer', 'Preview', 'Edit', and 'Clone'. A dotted line with arrows points from the 'Report Designer' button in the bottom left to the 'Reports' dropdown menu in the top center, and from the 'Section Library' option in the dropdown to the 'Associations' section in the table.

Job Template: Inserting Section into Reports



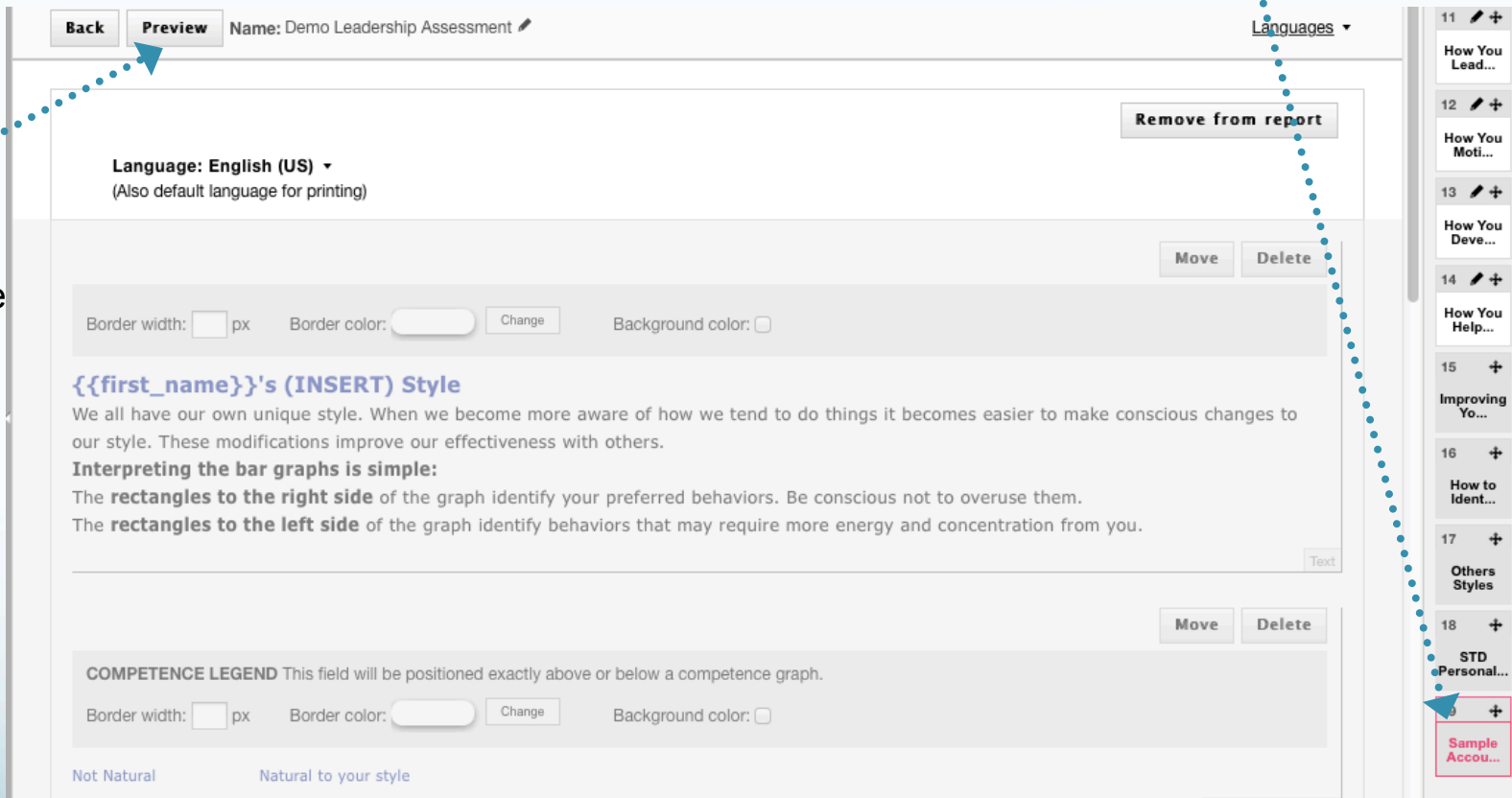
- To add the section, click on **“Add section from library”** towards the top of the right hand column.
- Select the section, you just created

Job Template: Inserting Section into Reports



- Your Job Template section has now been added to the bottom of your report. Scroll down to view the last section of the report on the right-hand side Sections Column.
- If you would like to move the section up in the report, click on the **+** button and drag it to where you would like it located in the report.

 **Tip:**
Click on the **Preview** button to download a sample of the updated report.



Back Preview Name: Demo Leadership Assessment Languages

Remove from report

Language: English (US) (Also default language for printing)

Move Delete

Border width: px Border color: Change Background color:

{{first_name}}'s (INSERT) Style

We all have our own unique style. When we become more aware of how we tend to do things it becomes easier to make conscious changes to our style. These modifications improve our effectiveness with others.

Interpreting the bar graphs is simple:

The **rectangles to the right side** of the graph identify your preferred behaviors. Be conscious not to overuse them.

The **rectangles to the left side** of the graph identify behaviors that may require more energy and concentration from you.

Text

Move Delete

COMPETENCE LEGEND This field will be positioned exactly above or below a competence graph.

Border width: px Border color: Change Background color:

Not Natural Natural to your style

11 + How You Lead...
12 + How You Moti...
13 + How You Deve...
14 + How You Help...
15 + Improving Yo...
16 + How to Ident...
17 + Others Styles
18 + STD Personal...
+ Sample Accou...



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