# Creating and Editing a Job Template

# 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"*

# Job Template: Creating a new Job Template

- From main menu click on **Templates** tab then **Job Templates** (from pull-down menu)
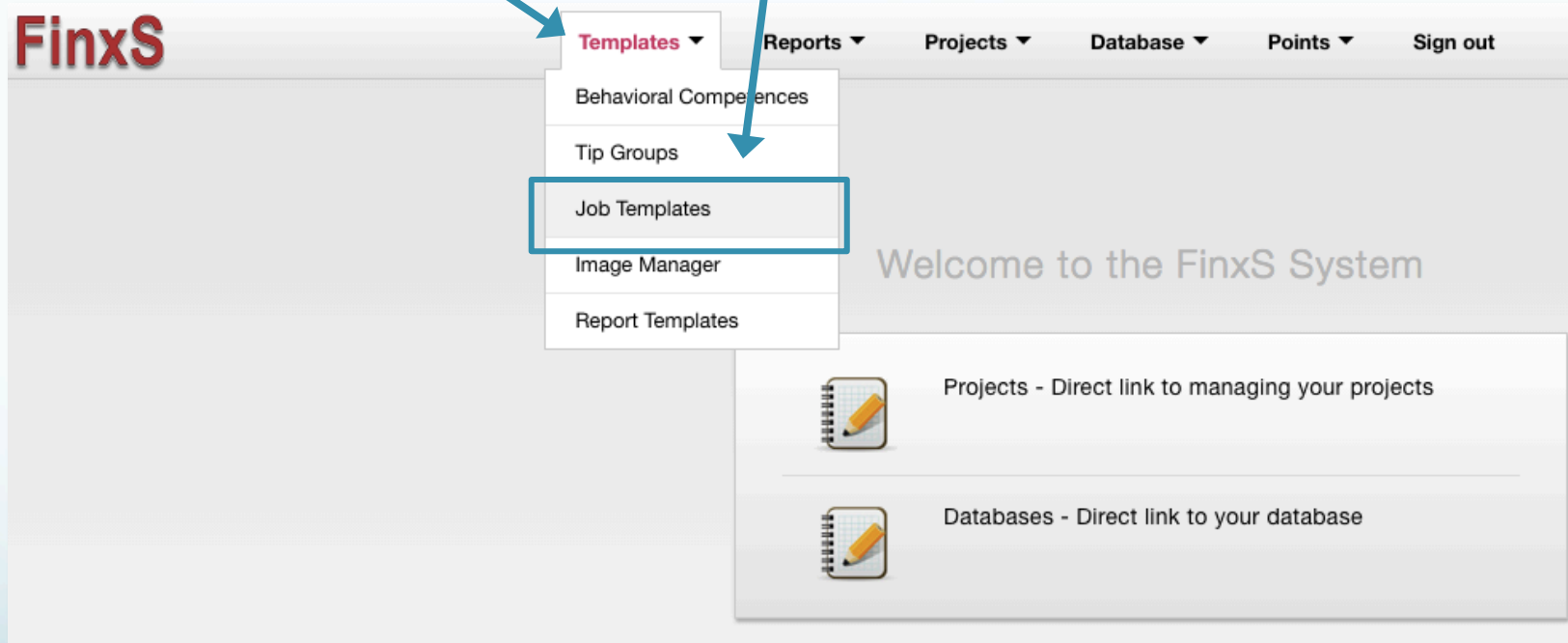
# Job Template: Creating a new Job Template

- Click on the "**+**" in the lower left corner of screen

# Job Template: Creating a new Job Template
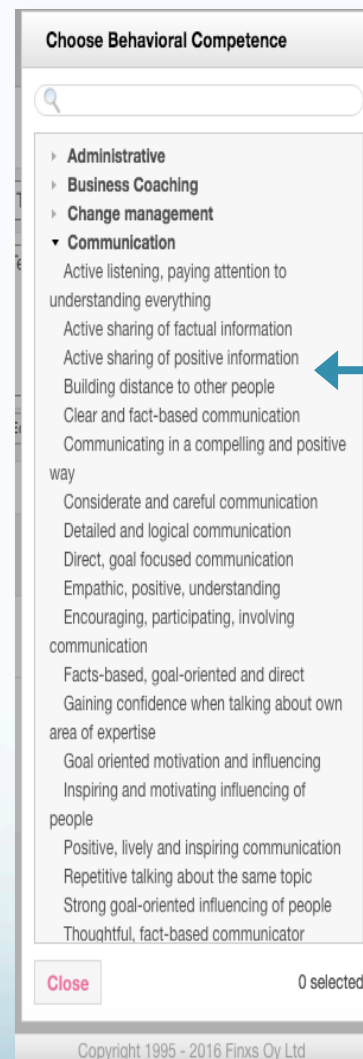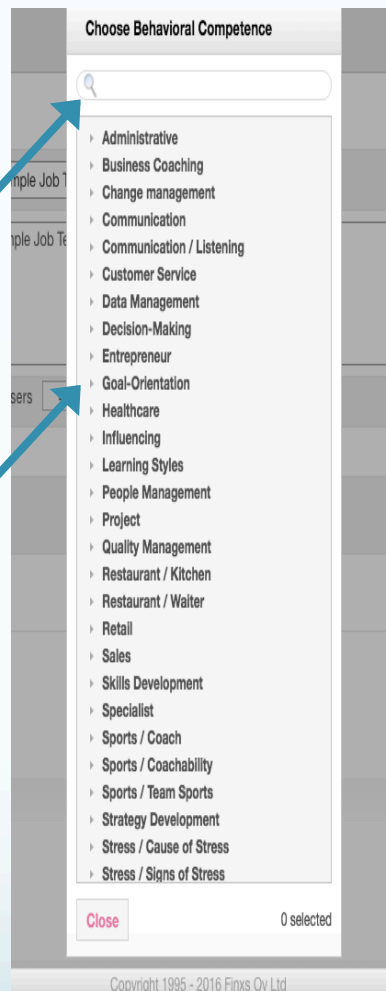
Complete the following fields:
- **Name:** Name the template (the position you are creating it for or the types of behaviors you will be selecting)
- **Description:** (optional) write in description
- Leave other settings blank
- Click on **Add Competence**

# Job 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

**Choose Behavioral Competence**

- ▸ Administrative
- ▸ Business Coaching
- ▸ Change management
- ▸ Communication
- ▸ Communication / Listening
- ▸ Customer Service
- ▸ Data Management
- ▸ Decision-Making
- ▸ Entrepreneur
- ▸ Goal-Orientation
- ▸ Healthcare
- ▸ Influencing
- ▸ Learning Styles
- ▸ People Management
- ▸ Project
- ▸ Quality Management
- ▸ Restaurant / Kitchen
- ▸ Restaurant / Waiter
- ▸ Retail
- ▸ Sales
- ▸ Skills Development
- ▸ Specialist
- ▸ Sports / Coach
- ▸ Sports / Coachability
- ▸ Sports / Team Sports
- ▸ Strategy Development
- ▸ Stress / Cause of Stress
- ▸ Stress / Signs of Stress

Close     0 selected

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**Choose Behavioral Competence**

- ▸ Administrative
- ▸ Business Coaching
- ▸ Change management
- ▾ Communication
  - Active listening, paying attention to understanding everything
  - Active sharing of factual information
  - Active sharing of positive information
  - Building distance to other people
  - Clear and fact-based communication
  - Communicating in a compelling and positive way
  - Considerate and careful communication
  - Detailed and logical communication
  - Direct, goal focused communication
  - Empathic, positive, understanding
  - Encouraging, participating, involving communication
  - Facts-based, goal-oriented and direct
  - Gaining confidence when talking about own area of expertise
  - Goal oriented motivation and influencing
  - Inspiring and motivating influencing of people
  - Positive, lively and inspiring communication
  - Repetitive talking about the same topic
  - Strong goal-oriented influencing of people
  - Thoughtful, fact-based communicator

Close     0 selected

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- 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 | 5 | ✕ |
| ✛ | Engaging the buyer; relationship selling | 5 | ✕ |
| ✛ | Inspired image-selling | 5 | ✕ |
| ✛ | Selling complicated solutions requiring product expertise | 5 | ✕ |
| ✛ | Selling the idea to people that they need a change | 5 | ✕ |
| ✛ | Short-term selling; inspiring and motivating buyers quickly | 5 | ✕ |

Cancel    Add Competence    Save

**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.
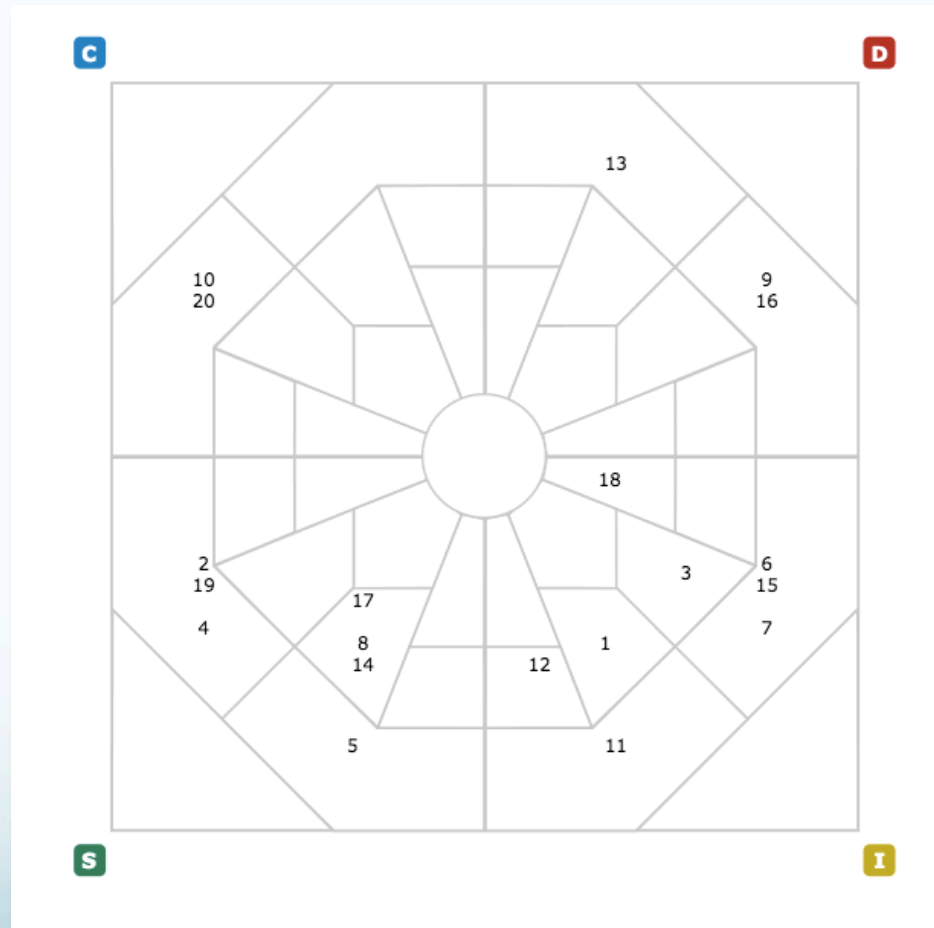
# Job Template: Editing

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

# Job Template: Inserting into Section

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

# Job Template: Inserting into Section

- Rename and press **Save**

# 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**

# 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

# 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



**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.



"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.

# 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.**
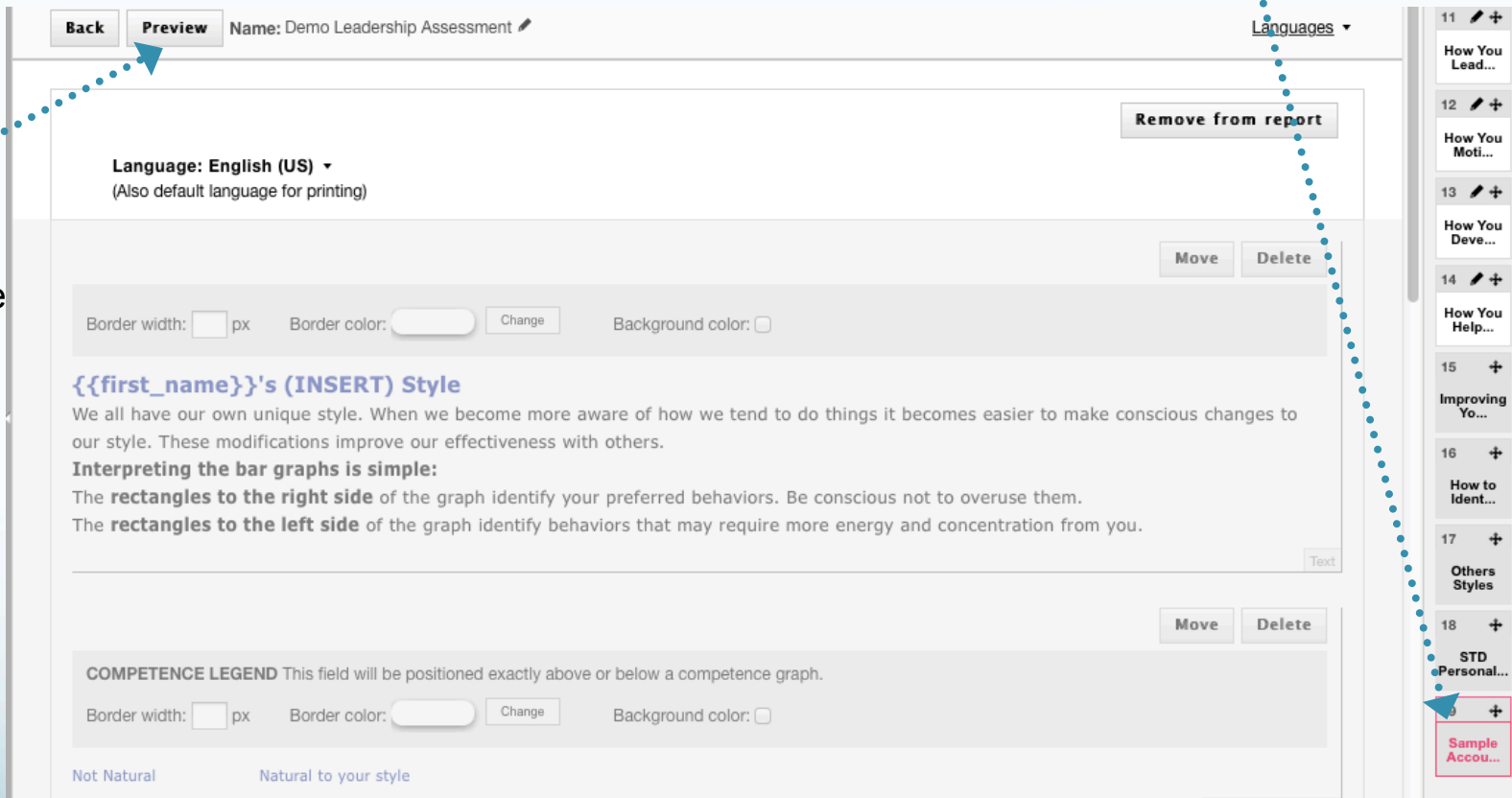
# Job Template: Inserting Section into Reports

- 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.

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