



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”

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: the first is labeled 'Username' with a person icon, and the second is labeled 'Password' with a padlock icon. Below the password field is a link that says 'Forgot password?'. To the right of the input fields is a red button with the word 'Submit' and a right-pointing arrow.

**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.



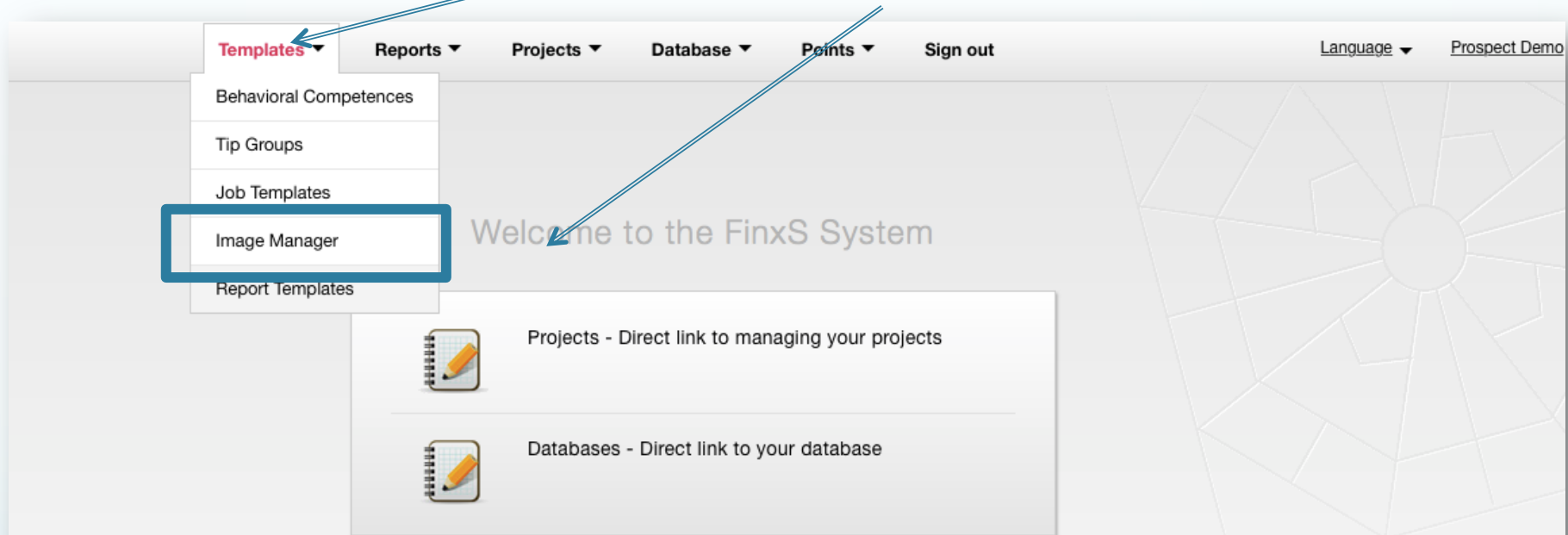
Image Manager

Adding images to a report

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="text" value="All languages"/>

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

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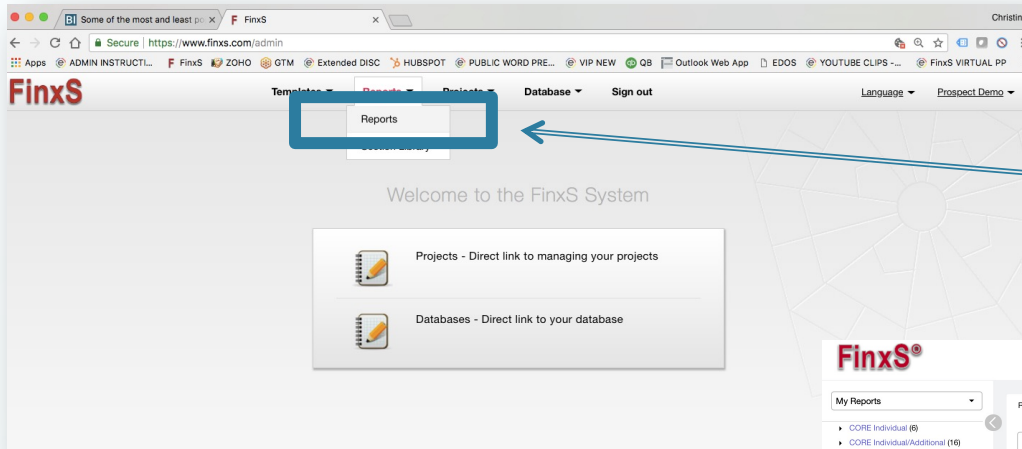
Report Designer

Editing a Report

Report Designer – to Edit a report

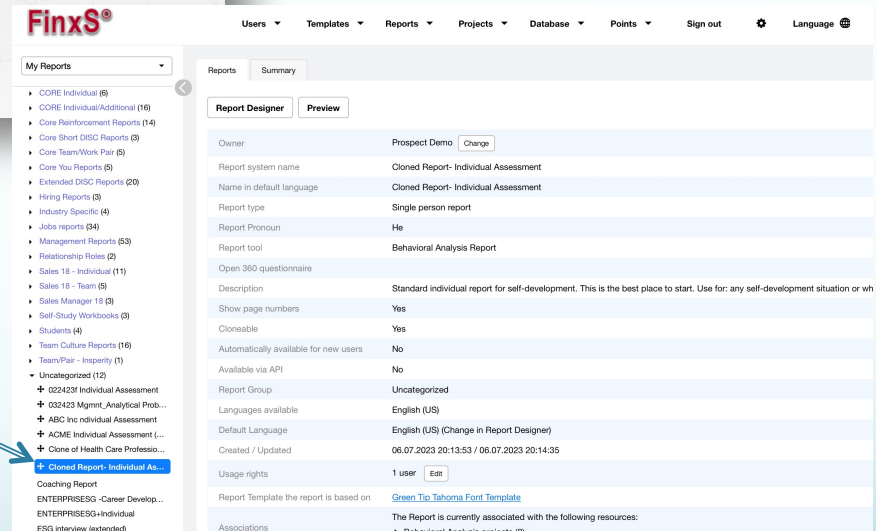


- The Report Designer is the place to customize your report; it places a specific field in the Report (e.g., text, image, space) by drag-and-dropping it to appropriate place.



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

- Select and highlight the report from “My Reports” (left-hand column) to edit



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 – to Edit a report



Users ▾ Templates ▾ Reports ▾ Projects ▾ Database ▾ Points ▾ Sign out ⚙ Language 🌐 F (

My Reports ▾

- ▶ CORE Individual (6)
- ▶ CORE Individual/Additional (16)
- ▶ Core Reinforcement Reports (14)
- ▶ Core Short DISC Reports (3)
- ▶ Core Team/Work Pair (5)
- ▶ Core You Reports (5)
- ▶ Extended DISC Reports (20)
- ▶ Hiring Reports (3)
- ▶ Industry Specific (4)
- ▶ Jobs reports (34)
- ▶ Management Reports (53)
- ▶ Relationship Roles (2)
- ▶ Sales 18 - Individual (11)
- ▶ Sales 18 - Team (5)
- ▶ Sales Manager 18 (3)
- ▶ Self-Study Workbooks (3)
- ▶ Students (4)
- ▶ Team Culture Reports (16)
- ▶ Team/Pair - Insperty (1)
- ▼ Uncategorized (12)
 - + 022423f Individual Assessment
 - + 032423 Mgmt_Analytical Prob...
 - + ABC Inc individual Assessment
 - + ACME Individual Assessment (...)
 - + Clone of Health Care Professo...
 - + Cloned Report- Individual As...
 - Coaching Report
 - ENTERPRISESG -Career Develop...
 - ENTERPRISESG+Individual
 - ESG interview (extended)
 - + My Individual Assessment - ED...
 - + My Sample Individual Assessm...

Report Designer Preview

Owner	Prospect Demo Change
Report system name	Cloned Report- Individual Assessment
Name in default language	Cloned Report- Individual Assessment
Report type	Single person report
Report Pronoun	He
Report tool	Behavioral Analysis Report
Open 360 questionnaire	
Description	Standard individual report for self-development. This is the best place to start. Use for: any self-development situation or wh
Show page numbers	Yes
Cloneable	Yes
Automatically available for new users	No
Available via API	No
Report Group	Uncategorized
Languages available	English (US)
Default Language	English (US) (Change in Report Designer)
Created / Updated	06.07.2023 20:13:53 / 06.07.2023 20:14:35
Usage rights	1 user Edit
Report Template the report is based on	Green Tip Taberna Font Template
Associations	The Report is currently associated with the following resources: <ul style="list-style-type: none">▶ Behavioral Analysis projects (0)
Print type	Cover Page & Content Pages

Report Designer Preview

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- Once the report is selected, click “Report Designer”

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.)

The screenshot displays the Report Designer interface. At the top, there are buttons for 'Create Library Section', 'Preview this section', 'Copy this section', and 'Delete this section'. Below these is a language dropdown set to 'English (US)'. The main area shows a section editor with a 'Text' field and 'Move' and 'Delete' buttons. A section library on the right lists sections: 'INTRO' (highlighted in red), 'PROFILES', 'Comfort Areas', 'You at a Glance', 'Your Motivators', 'Demotivators', and 'STRENGTH PR...'. The 'INTRO' section is highlighted in red, indicating it is selected for editing.

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.

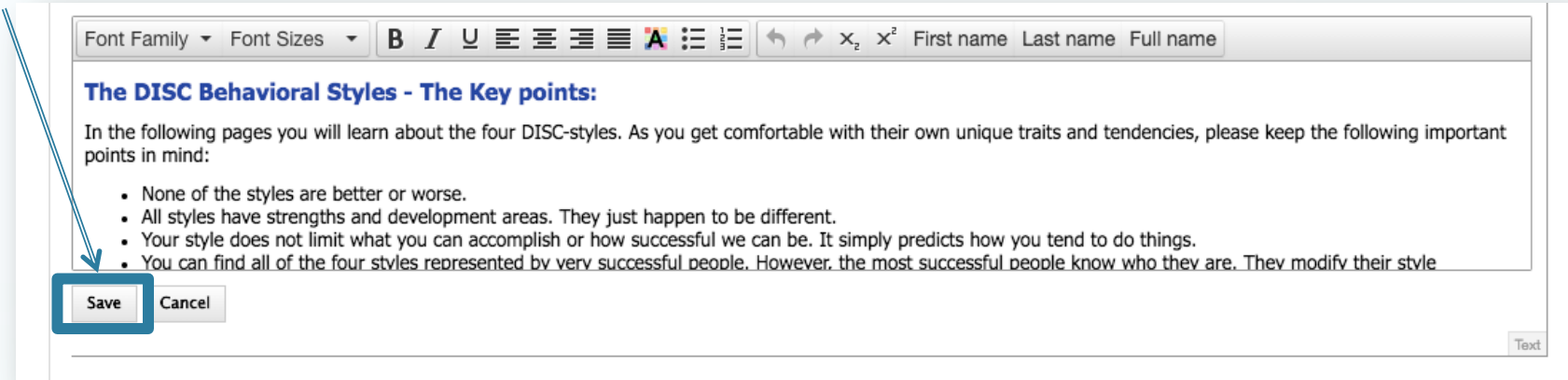
A screenshot of the Report Designer interface. At the top, there are four buttons: "Create Library Section", "Preview this section", "Copy this section", and "Delete this section". The "Delete this section" button is highlighted with a blue box. Below these buttons, there is a dropdown menu for "Language: English (US)". The main area shows a preview of a report section with a "Move" and "Delete" button. On the right side, there is a "Template section" panel with a list of sections: "1 INTRO", "2 PROFILES", "3 Comfort Areas", "4 You at a Glance", "5 Your Motivators", "6 Demotivate", and "7 STRENGTH PR...". Each section in the list has a pencil icon and a plus sign. Arrows from the text above point to the "Delete this section" button and the plus sign on the "INTRO" section in the template list.

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

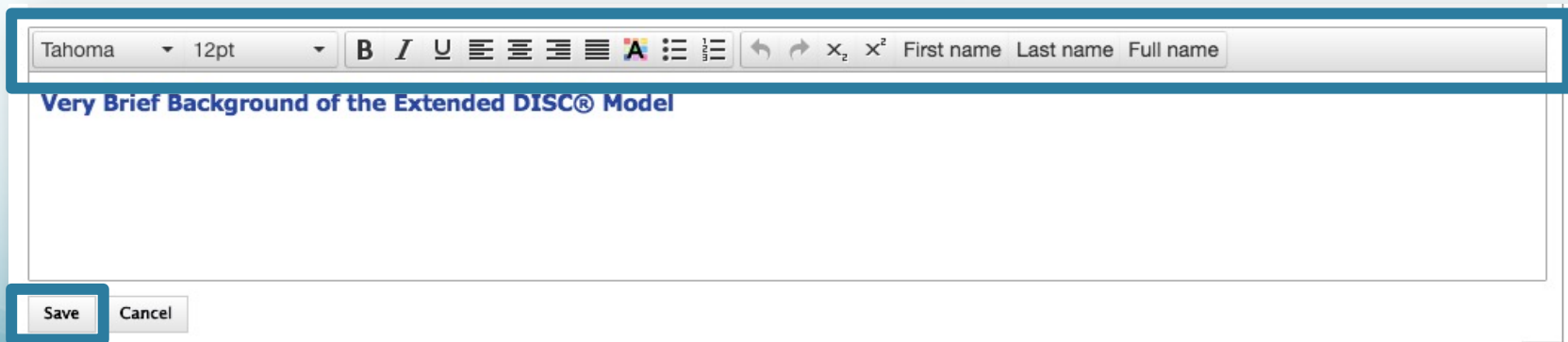
Report Designer – to Edit Text



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



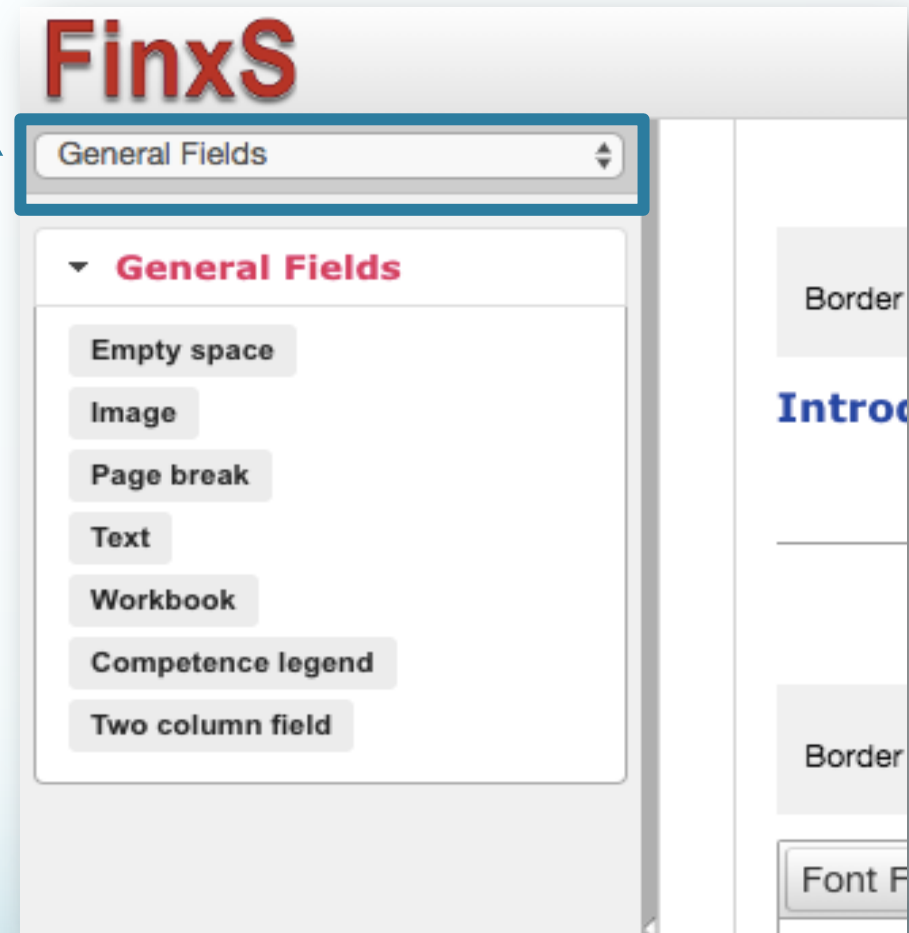
- Use the tool bar to edit font, font size, color, alignment etc.
- You can insert name field into text; system will automatically insert individual’s name



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. At the top, there's a navigation bar with 'Templates', 'Reports', 'Projects', 'Database', and 'Sign out'. Below that, a 'Preview' button is visible. The main area displays a report preview for 'TW Testing Standard individual-no sections'. The report content includes a 'Cover section header title' field with the text 'Individual Assessment', a 'Cover section header text' field with a paragraph about the assessment, and a 'Content page header title' field with the text 'Individual Assessment'. On the right side, there's a 'Template section' dropdown menu with a list of sections: 'INTRO', 'PROFILES', 'Comfort Areas', 'Your Motivators', and 'Demotivate'. A blue box highlights the 'Template section' dropdown, and arrows point from the instructions to the 'Cover section header title', 'Cover section header text', and 'Content page header title' fields. A 'Preview cover page' button is also visible.

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

Template section

+

Add section from library

1 INTRO

2 **PROFILES**

3 Comfort Areas

4

NO COLOR

Include percentages Profiles With Colors

Use the slider to adjust image height in the report:

348

Profile I - Perceived Need to Adjust

D	I	S	C
60	40	0	0
0	0	45	55

Profile II - Natural Style

D	I	S	C
35	40	25	0
0	0	0	100

Include percentages Profiles With Colors

Use the slider to adjust image height in the report:

348

Profile I - Perceived Need to Adjust

D	I	S	C
60	40	0	0
0	0	45	55

Profile II - Natural Style

D	I	S	C
35	40	25	0
0	0	0	100

COLOR

Adding DISC Colors Report Profiles



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

Template section

+

Add section from library

1 INTRO

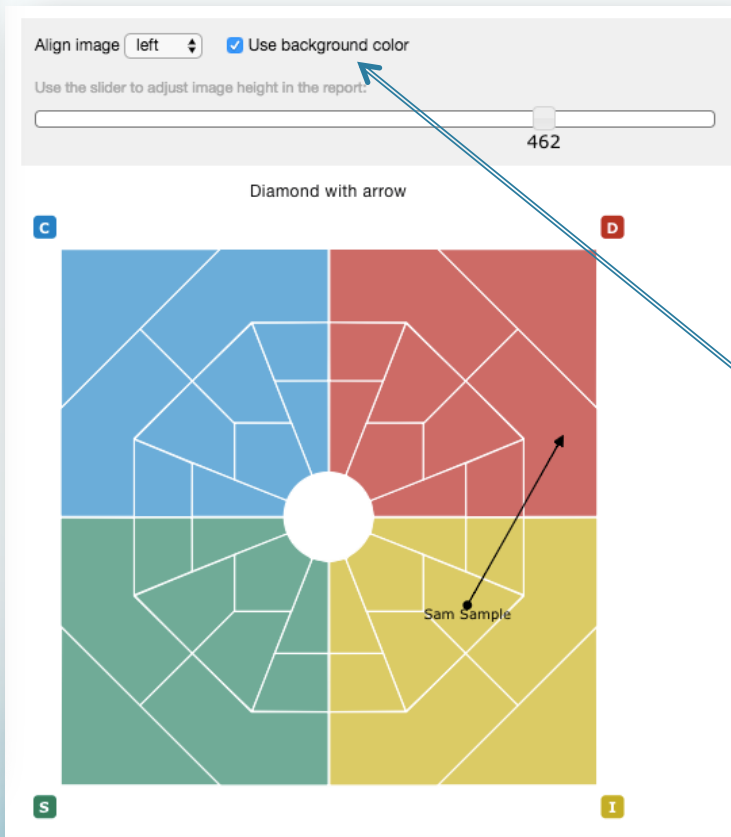
2 **PROFILES**

3

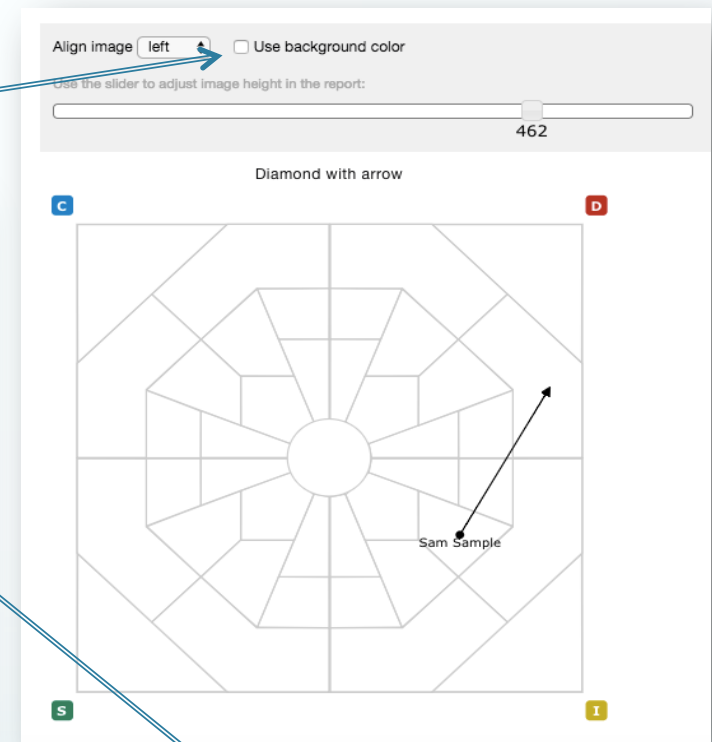
4

Comfort Areas

NO COLOR



COLOR





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For questions and additional tips:

Extended DISC VIP Client Resource Site

Sign up or login in for articles, admin instructions, recorded webinars, sample reports, training resources and updates.