Overview of the FinxS Main Menu

1. FinxS Admin Main Menu – Overview

| Users ▾ | Templates ▾ | Reports ▾ | Projects ▾ | Database ▾ | Points ▾ | Sign out |
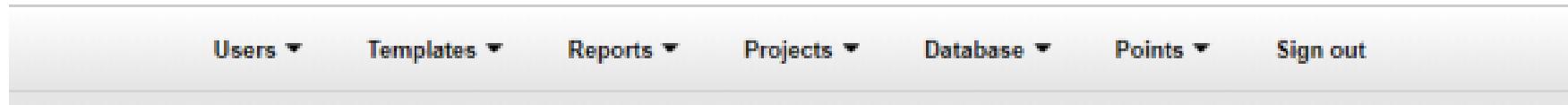
Below is a brief description of all the tabs found within FinxS.

1.1. Users tab

Users ▲

Activity Log

Admin users

User Summary
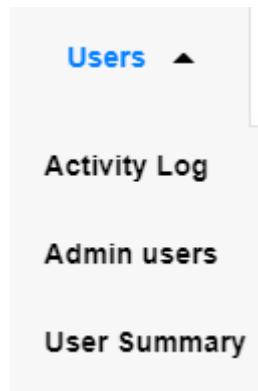
- Activity Log: This shows the activity in your account, e.g. the date and times someone has logged into it.
- Admin Users: Here you can see and edit your account details, create new FinxS admin accounts and view current admin users and account information.
- User Summary: This provides basic details about the user(s) and the account.

1.2. Templates tab

Templates ▲   **Reports**

Behavioural Competences

Ideal Jobs

Styles

Tips

Answering Interfaces

Job Templates

Image Manager

Report Templates

Open Questionnaires
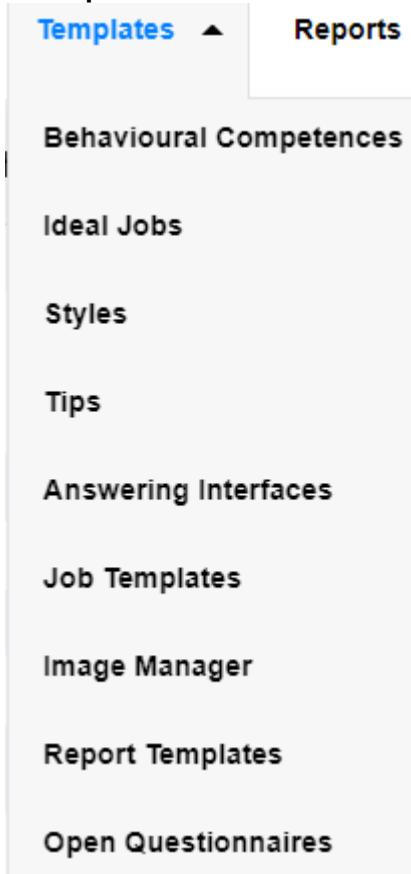
- Answering Interfaces: This gives details of the current interface that is set up for your candidate reports. Nb: the interface can be changed to feature your logo, images etc. so the testing process looks like your own.
- Job Templates: You can create job templates using behavioural competencies to view against a candidate's results.
- Image Manager: You can store images here. There is a limit of 50 images and each image must be less than 900 kb.
- Report Templates: Here you can create branded report templates (cover and content page 'look and feel').
- Open questionnaires: Here you can create Open 360 questionnaires, Surveys and Research Module questions.

1.3. Reports

Reports ▲

Reports
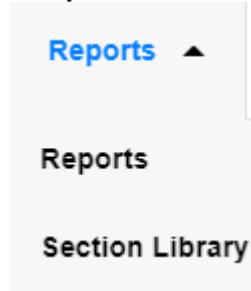
Section Library

- Report: Create and view the content of reports in the Report Designer.
- Section Library: Here you can create, design and store sections to include in reports.

1.4. Projects
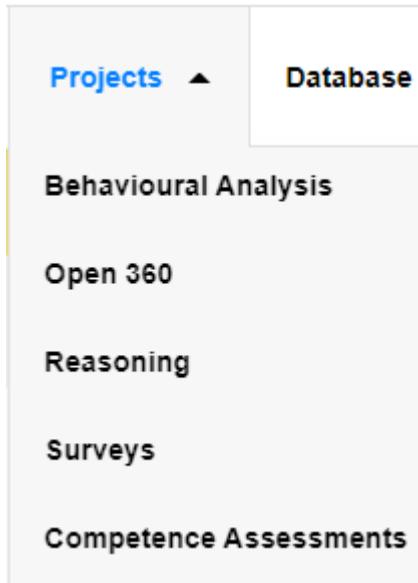
- Behavioural Analysis: Create a Project for an Extended DISC Assessment.
- Open 360: Create a Project for an Open 360.
- Reasoning: Create a Project for a Reasoning Analysis Report.
- Surveys: Create a Project for a Survey.
- Competence Assessments: Create a Project for a competence-based assessment.

1.5. Database

- Benchmarks: Create and update reasoning analysis benchmarks.
- Individuals: Here you will find a database containing individual results for Behavioural Analysis, Competency Assessments, Open 360 and Reasoning Analysis Reports. You can download individuals' reports, check out single behavioural competencies and numerous graphics relating to your candidates' results, view results against any job templates you've created and preview sections of individual candidates' reports.
- Surveys: The database for Surveys.
- Teams: The database for Team Reports.

1.6. Points
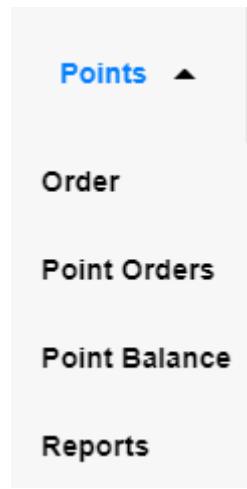
- Order: Order points through FinxS for approval by your provider.
- Point Orders: Approve or deny point orders from any user below you.
- Point Balance: Shows the available points in your FinxS account, including any points in your clients' accounts.
- Reports: Create Point Action, Point Consumption, and Point Store reports for you and any users below you.
- Transfer: Transfer points between Admin users accounts, if you have other accounts set up.

1.7. Sign out

- Sign out of your FinxS account.