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HOW TO: Use the Team Database for Behavioural Analysis

Set Up a Team and View it in Open Preview

Set up a team, view and print the team's results against Behavioural Competences, Job Templates and Graphics. Set up and save your team in the FinxS system. Team Members can be easily added and deleted.

To set up a team:

- Log into your account.
- Select the "Database" tab along the top of your dashboard screen.
- Select "Teams" from the dropdown menu.
- Select the  symbol in the lower left corner of the screen.
- Enter a unique name for your team. This will appear in the column on the left-hand side of the screen.
- Optional: choose a full name.
- Enter the organisation name.
- Optional: grant usage rights. Click 'edit' and put a ☒ in the box next to any user account you wish to give access to.
- Optional: select a Job Template, if appropriate; otherwise leave blank.
- No of people: you can't enter information here. (The FinxS system will enter the number of team members).
- No of surveys: you can't enter information here.
- Select "Static" if you would like to add team members manually. Click 'save' and proceed to the next heading below: "To select team members".
- Select "Dynamic" if you want to add everybody from a specific project. Then select "Project" and choose one of your projects/access codes from the list that appears. Click 'save'. (You will not need to complete the next step (below), which involves manually selecting team members).

To select team members manually: (if you selected "Static" above)

- Stay on the same screen and select the "Team Database - Individuals" tab at the top.
- Click on the "All Results" button at the top left-hand side.
- Select the team's name you've just created – you'll find it under the heading "My Teams" in the column on the left-hand side.
- Select the team members by putting a tick in the box next to their names; once chosen a circle will appear.
- Select a team leader (if needed) by clicking on the circle beside their name. No need to save.

To view Behavioural Competencies, Job Templates or Graphics for a team:

- Return to the "Teams" tab at the top.
- Select the desired team name under the "My Teams" heading in the left-hand column.
- Click on the "Open Preview" button.
- Team members' names will appear on the right-hand side.
- Click on any or all of the names to highlight them or click on "Select All" to select all team members.
- Select either the Behavioural Competencies, Job Templates or Graphics tab to view the selected individuals' results against these.
- You'll find specific options for Behavioural Competencies and Graphics in the column on the left-hand side.