

HOW TO: Use Open Preview

Open Preview

Open Preview allows you to view Graphics, Job Templates and single Behavioural Competences on-screen:

- Behavioural Competences – there are over 1600 available.
- Job Templates (if you've created some). If not, go to the 'Templates' tab, select 'Job Templates' and click the + button in the bottom left corner to get started.
- Graphics – Profiles, Diamonds, Flexibility Zones, Pie Charts, etc.

To use Open Preview, go to the "Database" tab and select "Individuals" from the dropdown menu. Expand the Behavioural Analysis heading in the left-hand column. Select a project. Click in the boxes beside the names of the people you would like to preview from the list that comes up. (Multiple people can be selected to view in Open Preview at the same time).

- Select "Open Preview" from the four boxes that appear above the names of your selected candidates.
- Three tabs will appear on a new screen: Behavioural Competences, Job Templates and Graphics.
- If you select "Behavioural Competences", you'll then need to click on the name/s of the individuals you'd like to preview from the list on the far right of the screen to highlight them. Then select from the list of competences on the left-hand side. Note: you can only view one competence at a time. However, multiple people can be selected.
- If you select "Job Templates", choose the job template you require from the list on the top left of the screen (i.e. your own pre-built job templates), then the name/s of the people you would like to view from the list on the top right of the screen. Each person's results will be put against each of the competences that make up the job template. Percentage matches of each competence with each person will show, if you selected an ideal score when building the template, and an overall percentage match for each candidate will be shown at the bottom of the job template.
- If you select "Graphics", choose the graphic you would like to view from the list on the left-hand side of the screen. Note: there are single person graphics to select at the top and multiple person graphics beneath them. You will also need to select which candidates to display from the list on the top right of the screen.

Open Preview – Behavioural Competences: an example.

BEHAVIOURAL COMPETENCES

▼ Administration

- Attempting to exceed previous quality standards
- Communicating own special knowledge to others
- Consistently developing processes
- Creating administrative systems
- Criticising existing systems
- Developing administrative routines for oneself and others
- Developing new procedures
- Diverse project planning duties
- Diverse, task-focused interactions with others
- Familiarising and guiding others
- Handling many tasks that require contact with people
- Organising and completing daily activities
- Participating in projects requiring accuracy
- Persistent solving of difficult logical problems
- Providing guidance in complicated matters
- Repetitive duties requiring accuracy

Repetitive duties that require concentration and accuracy

Repetitive duties that require contact with people

Repetitive, detailed tasks

Selling administrative solutions to others

► Business Coaching

► Change Management

► Customer Service

► Data Management

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Behavioural Competences Job Templates Graphics

Select All Deselect All

Susan Brown (26.10.2016)

Denise Jackson (26.10.2016)

Mary Jones (26.10.2016)

Repetitive duties that require concentration and accuracy

Susan Brown:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Denise Jackson:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Mary Jones:	-5	-4	-3	-2	-1	0	1	2	3	4	5

Open Preview – Job Template: an example.

The screenshot shows a software interface for managing team members and their performance. On the left, a sidebar lists various competencies and roles, with 'Sales Manager Management' highlighted in blue. The main content area has tabs for 'Behavioural Competences', 'Job Templates' (which is selected and highlighted with a red box), and 'Graphics'. Below these tabs, there are buttons for 'Print all' and 'Print Xls' and 'Print PDF'. On the right, there are buttons for 'Select All' and 'Deselect All', and a list of selected team members: Susan Brown (26.10.2016), Denise Jackson (26.10.2016), and Mary Jones (26.10.2016). The main content area displays three sections of data for each team member, each with a title and a 5-point scale from -5 to 5. The first section is 'Maximum utilisation of the skills of each team member'. The second is 'Inspiring the team to achieve challenging goals'. The third is 'Influencing team performance by focusing on goals'. Each section shows the person's score, the expectation score, and a percentage value.

Competency	Susan Brown	Denise Jackson	Mary Jones	Expectation	Percentage
Maximum utilisation of the skills of each team member	-5 -4 -3 -2 -1 0 1 2 3 4 5	-5 -4 -3 -2 -1 0 1 2 3 4 5	-5 -4 -3 -2 -1 0 1 2 3 4 5	100% 25% 35%	100% 25% 35%
Inspiring the team to achieve challenging goals	-5 -4 -3 -2 -1 0 1 2 3 4 5	-5 -4 -3 -2 -1 0 1 2 3 4 5	-5 -4 -3 -2 -1 0 1 2 3 4 5	80% 20% 100%	80% 20% 100%
Influencing team performance by focusing on goals	-5 -4 -3 -2 -1 0 1 2 3 4 5	-5 -4 -3 -2 -1 0 1 2 3 4 5	-5 -4 -3 -2 -1 0 1 2 3 4 5	65% 25% 90%	65% 25% 90%

Find instructions to create your own job template [HERE](#).

Open Preview – Graphics: an example.

SINGLE PERSON GRAPHICS

Profiles

- Profiles adjusted
- Diamond
- Diamond with arrow
- Flexibility Zones
- Flexibility Zones with arrow
- Diamond with text
- Diamond with text and arrow
- 4Q Standard
- 4Q Sales
- 4Q Leadership
- 4Q Management
- 4Q Customer Service
- 4Q Motivation
- 4Q Team Member
- 4Q Overused Styles
- 4Q Job Content
- 4Q Employee
- DISC Pie
- DISC Pie with percentages
- DISC Pie II
- DISC Pie II with Percentages

MULTIPLE PERSONS GRAPHICS

- Shotgun map
- Shotgun map with text
- Name map
- Name map with text
- Arrow map
- Arrow map with text
- Team Flexibility Zones
- Team Flexibility Zones with text
- 4Q Team - Standard
- Team Pie - Both Profiles
- Team Pie - Profile II

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Select All Deselect All

Susan Brown (26.10.2016)
Denise Jackson (26.10.2016)
Mary Jones (26.10.2016)

Use the slider to adjust the image height in the report

400

Susan Brown (26.10.2016)

	D	I	S	C
Left Graph	70	30	0	0
Right Graph	100	0	35	45