HOW TO: Create and Edit a Behavioural Analysis Project

VERSION | Date

Projects

8.1. Definition of a Project in FinxS

When you create a 'Project' in your FinxS account, you are required to create an 'access code'. This access code is unique to your account and it links all the results completed by using it to your account.

The project and associated access code specify:

- The type of assessment the candidate is going to complete (i.e. Behavioural Analysis, Reasoning, Open 360, etc.),
- How the results of the assessment will be sent,
- The type of answering interface that will be used,
- Whether passwords have been allocated or not.

Please note: HR Profiling Solutions has already created a "Project" for you in your account.

Instances when you might need to create a new project:

- When you are doing assessments on a large scale for a particular organisation. (You might like to create a project/access code specifically to use with them).
- If there are multiple users of your account and each user has their own client(s). In this case, each user might like to have their own project/access code to use.

8.2. Creating a Project for a Behavioural Assessment (when you intend to manually send the access code to your candidate by email).

NB: This is the first of two options. The other option is explained in 8.4

- Log into your account.
- Select "Projects" from the tabs along the top of the screen.
- Then select "Behavioural Analysis" from the dropdown menu.
- Look down to the bottom left-hand side of the screen and click on the + sign.
- A new screen will appear, with the heading "General".
- Complete the following fields:
    - Organisation
    - Access Code – type in an access code of your choice with report notation at the end, e.g. BA (for Behavioural Analysis).
    - Name = name of the report, e.g. Recruitment Report. (This will appear in the column on the left).
    - Name shown to respondent = what the individual taking the assessment will see.
    - Send method – select "PDF - Report" from the dropdown box if you want the report to be generated and emailed automatically.
    - Report – select the report you want to be associated with this project.
    - Answering Interface – select one from the dropdown box.
    - Description – leave blank.
    - Questionnaire – leave blank.
    - Input your email address and that of anyone else whom you want to receive a copy of the report.
    - Send to respondent – this is your choice, but it's not usually ticked.
    - Allowance Type – always choose 'Unlimited'.
    - Require Password – select "Yes" if required or "No" if not.
    - If passwords wanted, generate the selected number, copy and save elsewhere.
    - Make the opening date the day before to cover the time difference between here and Finland, where the platform is run from.
    - Closing date – leave blank.

- Status – leave as "Active."

- Click "Save" at the top or bottom right of the screen.
- The next step requires adding instructions to the project for when the candidate logs-on to complete the assessment.
- Select the tab along the top of the screen called 'Project Instructions'.
- Click on the blue 'Edit' button on the right-hand side of the screen.
- Copy and paste the following into the 'Header' box:
  Extended DISC Candidate Instructions

- Then copy and paste the following into the 'Project Instructions' box:

  You are about to complete an Extended DISC Behavioural Assessment.
  This is an online, self-assessed behavioural analysis that describes a person's natural and learned behavioural styles.
  It is not a 'personality' test. The assessment does not give high or low scores or in any other way classify people into 'better' or 'worse' categories or measure intelligence, professional skills or attitudes.

  Instead, it gives accurate data on the behavioural styles that someone consciously and unconsciously displays. It does not limit a person's ability to develop and change.

  It is based on the Extended DISC model which has a proven statistical reliability and validity and has been successfully used in hundreds of organisations worldwide since 1994.

  To achieve reliable results:
  - Complete the questionnaire with your current role in mind.
  - Answer the question as you see yourself – not as you wish to be seen.
  - Select the answer that first feels right. There are no "right/wrong/good/bad" answers.
  - Answer the questions in order.

- Do not return to a previously answered question.

- Always answer both components (‘What describes you the best?’ and ‘What describes you the least?’) before moving to the next question.

- Complete the questionnaire without interruptions. Do not do anything else or talk with anyone during the process.

- Complete the questionnaire quickly, but not hastily. Don’t ponder the questions too much. Answering the whole questionnaire should take only 7 to 10 minutes.

- Do not attempt to influence the results; you will only confuse yourself and invalidate the results.

* Select “Save” at the bottom right of the screen.

8.3. Create new passwords and check passwords for Behavioural Analysis Projects (in which you send the access code and password to the candidate manually by email)

- Select 'Projects' from the tabs along the top of the screen and then 'Behavioural Analysis' from the drop-down menu.
- Select 'Behavioural Analysis' in the column on the left-hand side of the screen.
- Highlight the Project name you wish to check or add passwords to.
- Select the tab along the top of the new screen that has come up called 'Allowance.'
- Click on the blue 'Edit' button on the far right of the screen.
- If passwords are not used in this project, the 'No' circle will be marked; if they are the 'Yes' circle will be marked.
- If passwords are used, the screen will show a box of used and unused passwords.
- To generate new passwords, go to the field called 'Number of passwords' and enter the number of passwords required in the empty box beside it.
- Click on 'Generate Passwords'.
- Passwords will appear in the 'Unused Passwords' field.
- Copy and paste them to another document for easy record keeping.
- Click 'Save' on the right-hand side of the screen.
- If you do not wish to use passwords anymore, select the "No" circle to make this change and then "Save".
- NOTE: Passwords can only be used once.

8.4. Creating a Project for a Behavioural Assessment (when you want the system to send an invitation directly to your candidate(s))

- Log into your FinxS account.
- Go to the ‘Projects’ tab and select ‘Behavioural Analysis’ from the dropdown menu.
- Click on the + button in the bottom lefthand corner.
- Complete the fields with a red asterisk alongside them, including creating an access code for your candidates. Nb: ‘Name’ is the name of the test and this name will appear in the lefthand column after you click SAVE. ‘Send Method’ would normally be ‘PDF Report’.
- Where it says ‘Require Password’ – you must click ‘YES’ to enable the invitation process.
- The words ‘Known Respondents’ will appear on the next line. Click YES.
- There is no need to give a number of passwords or click the ‘Generate Passwords’ button. (The system will give you one when you enter the candidate’s details a little later.)
- There is no need to enter an Opening or Closing Date.
- Do not click ‘Send to respondent’ unless you want your candidate to be automatically sent a copy of their report upon completing the questionnaire.
- Click ‘Save’.
- Click on the ‘Allowance’ tab above the project details (There are 5 tabs: General, Allowance, Thank You! Page, Project Instructions, Emails, Summary. Click on the ‘Allowance’ one).

- Click on the box containing the words ‘Add Respondent’.

- Boxes to enter your candidate’s first name, last name and email address will appear. Enter their details.

- You will see that a password is also produced.

- Click ‘Save’.

- The word ‘Action’ will appear beneath the words ‘Known Respondents’ in the top field, along with two boxes containing the words ‘Send invitations: 1’ and ‘Send reminders: 1’. If you are ready to send the invitation to your candidate, click the ‘Send invitations’ box. Or, you may want to add more respondents and then click this box.

- You can choose to ‘Send reminders’ at an appropriate time in the future, if you wish.
- The final step is to add instructions to the project for the candidate to read when they log on to complete the assessment.
- Select the tab along the top of the screen called ‘Project Instructions’.
- Click on the blue ‘Edit’ button on the right-hand side of the screen.
- Copy and paste the following into the ‘Header’ box:

  Extended DISC Candidate Instructions

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- Answer the questions in order.
- Do not return to a previously answered question.
- Always answer both components ('What describes you the best?' and 'What describes you the least?') before moving to the next question.
- Complete the questionnaire without interruptions. Do not do anything else or talk with anyone during the process.
- Complete the questionnaire quickly, but not hastily. Don't ponder the questions too much. Answering the whole questionnaire should take only 7 to 10 minutes.
- Do not attempt to influence the results; you will only confuse yourself and invalidate the results.

- Click 'Save' at the bottom right of the screen.