



# Extended DISC® Australasia Ltd

## EDOS Manual for Client Admin

## Quick User Guide

### New EDOS User Account

#### 6.1 Setting up a new Client User in EDOS

A Client Admin can:

- Create / delete users at Client User level.
- Create Personal Analysis Accounts for itself (Client Admin) and Client Users.
- Do operations for itself and on behalf of its sub-users.

To set up a new Client User account choose “EDOS User Accounts” from the main menu and then select “New User”.

“Existing Users” is where existing EDOS user accounts may be reviewed.

#### Online Information

- Within the “User Name” field enter the name in which the user will log in to the EDOS Admin website.
- Within the “Password” field enter a password which the user will log in to the EDOS Admin website.
- “User Level” displays pre-defined level: Client User.
- “Client Admin” displays pre-defined username of the Client Admin.
- “Country Code” displays the pre-defined country code for Extended DISC Australasia.
- Select the default language to be used within the system e.g. English Australasia.

#### Purchase Information

- The “Maximum Counter Balance” defines the maximum amount of points that a user can have on a counter.
- Points to be Added
- Select whom the client may purchase points from. Typically we suggest the following selections:
- This allows the client user to order points both from the Admin as well as Extended DISC Australasia.
- Select the “Currency” in which the price per point will be defined e.g. Australian Dollar
- Purchase options can be defined in two ways:
  - Flexible Amount – by defining up to 4 levels of price ranges
  - Fixed Amount – by defining up to 4 levels of order sizes
  - Fixed – minimum one price range needs to be defined.
  - Flexible – minimum one order size needs to be defined e.g.

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### Contact Information

- Enter the client admin contact person
- Enter the client admin contact email
- Enter the client admin organisation
- Select the client admin country
- Enter the client admin address. This is where invoices and correspondence will be sent.
- Select "Status" as Active
- Click on "Save" at the top of the form

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### How to set up Access Codes

#### 1.1 Define Default settings for Personal Analysis Access Codes

To set up your default settings for all Access Codes go to “Assessment Tools” from the main menu and choose “Personal Analysis” then select “Default settings”:

- Select which country the results will be sent to e.g. Australia or New Zealand
- Do not fill in “Organisation” as this should be completed for each Access Code created
- Under “Access Code” enter AUS- or NZL- for the country you are in and leave the rest blank for completing when you create Access Codes
- Select which “Password” option is your preferred
- “No Password” means the respondent is not asked for a password only an Access Code
- “One Entry” means the respondent is asked for an individual password with the Access Code. This password can only be used once
- “Multi Entry” means the respondent is asked for a multiple use password with the Access Code. This password can be used over and over again

#### Send Method

Select “PDF File” as your default “Send Method”. You can choose your preferred send method each time you create a new Access Code. See “Creating a new Access Code for an explanation on the “Send Methods”

#### 1.2 Creating a Personal Analysis Access Code

- To create a Personal Analysis Access Code go to “Assessment Tools” from the main menu and choose “Personal Analysis” then select “New Account”. As you have set up your default settings for Personal Analysis Access Codes, some of the fields will have been automatically populated.
- “Country” should have been automatically populated.
- In “Organisation” enter in the name of the company you are creating the Access Code for
- Within “Access Code” AUS- or NZL- should automatically appear depending on the country you are in. When choosing the remaining characters of the Access Code you can have up to 11 letters or numbers after the initial AUS- or NZL- with no spaces e.g. NZL-EDTESTDTR. We recommend using a two letter abbreviation of your company name after AUS- or NZL- as this will enable Extended DISC Australasia to assist your respondents or clients if you are not available
- Change the “Password Type” if different from default setting
- Select the number of passwords required if have chosen “One Entry” or “Multi Entries”

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### Send Method

Select the “Send Method” if different from default setting. The different type of “Send Methods” are:

- “Do not sent results” – do not select this option
- “dtr with points taken” – do not select this option
- “dtr no points taken” – select this option if you use EDPS to view your reports
- “pdf file” – select this option if you receive your reports back in PDF format
- Do not change “Send to Respondent” field
- Type in “To email” address and “Bcc Email” address (if required). There must be a “To email” address, but “Bcc Email” can be left blank
- Add a “Customer email message” if needed, however see above notes on this under “Default Settings for Personal Analysis Access Codes for information about this option
- “Person Allowance” should default to unlimited – do not change
- “English Australasia” should be your default in the “Language” field
- If you have chosen “PDF file” as your “Send Method” above all the required pages and the page order you chose in your default settings will automatically appear. If you have chosen “dtr no points taken” as your send method, this information will be blank out as you do not need to select it
- **Additional style pages** can be ordered by ticking the appropriate box. You may select more than one however each page will deduct 7 points each. Each style will compare the profile with pre-set criteria according to the generic role.
  - Customer Service
  - Sales
  - Leadership
  - Management
  - Team
  - Office
  - Entrepreneurial
  - Project
  - IT
  - Trainer
- All remaining fields should not be changed without contacting Extended DISC Australasia
- The Client User receives an email confirming the Access Code has been created

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### 1.3 Modify a Personal Analysis Access Code

To modify a Personal Analysis Access Code from the main menu select “Assessment Tools” then choose “Personal Analysis” and select “Existing Accounts”.

- Within the Search screen click on “Search”, then select the Access Code you would like to modify from the list
- Only some fields are able to be modified after the Access Code was originally created.
- Click “Edit” and edit fields as necessary then click “Save”
- The Owner of the Access Code receives an email confirming the Access Code has been modified
- EDOS will show a confirmation screen when you have saved the modifications to the Access Code.

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### 2. How to Order Reports

#### 2.1 Ordering Personal Analysis Results

To order Personal Analysis Results from EDOS select “Assessment Tools” from the main menu, then select “Personal Analysis” and then select “Order Results”:

- Select the Search criteria. Then select “Search”
- EDOS will display a list of reports generated with that Access Code
- Select the results you want to order and click on “Order Results”
- Define the “Send Method” by choosing either “pdf file” or “dtr no points taken”
- If you are ordering one Personal Analysis Report “Separate PDF Files” should be “No”. If you are ordering multiple Personal Analysis Reports “Separate PDF Files” should be “Yes”. This will ensure you receive each Personal Analysis Report in a separate document.
- Check the language is “English Australasian”
- If you have selected “dtr no points taken” select “Order Results”
- If you have selected “pdf file” as your “Send Method”, ensure the pages you need have been selected. The standard Personal Analysis Report uses:
  - Profile and Diamond, Relationship Roles, Reading Guide, Questions, Cover Page, Text Page, Motivators Page, Graphical Page, Flexibility Zones, Present Situation
- If you require any Additional Style pages (see 2.2 below) select these now from the right hand column by ticking the box needed. Multiple Additional Style pages can be selected
- If you want to change the page order for this particular report, select the page and use the up and down arrows to move the page to where you want to be
- All remaining fields should not be changed
- Now select “Order Results”

#### 2.2 Ordering Additional Pages

It is possible to order additional pages with the Personal Analysis after the initial report has been produced. There are 10 predefined additional style pages available, 7 points will be deducted to order each style.

- Customer Service
- Sales
- Leadership
- Management
- Team
- Office
- Entrepreneurial
- Project
- IT
- Trainer

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Follow steps as for 2.1 above.

- Select the Special Behavioural Style page under “(50+) 7 points page (each)” that corresponds with the Job Comparison required.
- All remaining fields should not be changed
- Select “Order Results”



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### 3. How to Order Passwords

Some client users prefer to have passwords assigned to each report. This provides them with security and/or tracking references.

When creating an account 3 options are made available:

1. No Password
2. One Entry – allows only one questionnaire to be answered per password
3. Multi Entries – allows multiple questionnaires to be answered per password

- To order more passwords:
- Select “Assessment Tools” from the Main Menu
- Select “Personal Analysis”
- Select “Existing Accounts”
- Enter search criteria and click “Search”
- Select required client user account
- Select “Edit”
- Enter in the field “Number of Passwords” the desired amount; typically we suggest 20
- “Save”

An email will come through with notification that the account has been edited. Attached to this email is a .txt document with the available passwords.

It is recommended this is saved into a MS Excel spreadsheet to track and record as each password is used.

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### 4. Keeping Track of Points

The price of Extended DISC tools within the system is indicated by the amount of points. Each tool has its own price indicated by the points required.

Personal Analysis Report = 50 points  
Additional Style pages = 7 points each (10 styles available)  
Team Analysis Report (complete) = 60 points  
Team Analysis Report (maps only) = 20 points  
Work Pair Analysis Report = 10 points

Only Counter 1 is currently used in EDOS

#### 4.1 Requesting Points

- Points can be requested for your own account by selecting “Points” from the Main Menu
- Select “Points Store”
- Select “Order from Franchise Admin” or “Order from Client Admin”
- Select “Counter 1” and the quantity of points required. Please note the minimum and maximum quantities available to purchase. If you want to purchase more than the maximum quantity allows, please contact your Affiliate or Extended DISC Australasia
- Select “Purchase” and then “Confirm” on the next page
- When approval has been given, you will receive a confirmation email advising the points are available
- Should your order be “Denied” please contact your affiliate or Extended DISC Australasia

#### 4.2 Producing a Point Report

- There are 4 different Point reports available through the “Points” > “Reports” menu of EDOS.
- “Point Consumption” report shows all actions of the selected user that has consumed points
- “Point Order” report shows all actions of the selected user that has added, consumed or deleted points
- “Point Usage” report shows the history of all point actions of the selected user
- “Point Store” report shows the history of points added by Extended DISC Australasia to the selected user
- To create one of the above reports, simply choose the report required
- Select Counter 1
- Select User as required
- Define a date range if required
- Select “Search Point Transaction”
- This report can then be downloaded to Excel if required by selecting “Download Excel”