



discus[®]

quick start guide

Introducing Discus

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Guides to key features

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Signing in

Before you can use your Discus Online account, you'll first need to sign in.

- ▶ Go to www.discusonline.com.
- ▶ Enter your account number and password.
- ▶ Click 'Sign In'.



Finding your way around



This is your Discus tab bar, giving you instant access to all the most important features of Discus.

The tab bar always appears, wherever you are within the Discus profiler.

We've highlighted a few of the most important options here. We'll look at other features of the tab bar in more detail elsewhere in this guide.

- 1 Whenever you want to start a DISC test, just click this green 'Start Testing' tab.
- 2 To view results and reports, click 'Results' here (if you have any results on file, those will appear automatically when you log in).
- 3 This 'Messages' tab contains important news and notifications. It will highlight with a red figure to show you how many unread messages you have waiting.
- 4 Remember, wherever you are in Discus Online, just click the Help button and choose 'About this page' for complete information about the current page.

Help

Profile credits

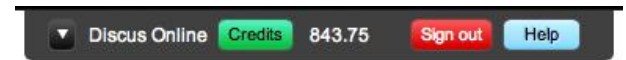
Whenever you create a profile, Discus Online will make a charge on your account using *profile credits*. You can see exactly how many credits you have on your account by checking the summary bar at the top of any page in Discus Online.


Credits

Click the green Credits button in the summary bar to jump straight to the Profile Credits

page. This explains how different profile types are charged, and gives you the option to add more credits at any time.

If you have no credits on your account, you can still create profiles, but in this case Discus Online will charge your account directly. It's usually a good idea to ensure that you keep your account topped up with credits (and it's also cheaper, since blocks of credits are available at discounted rates).

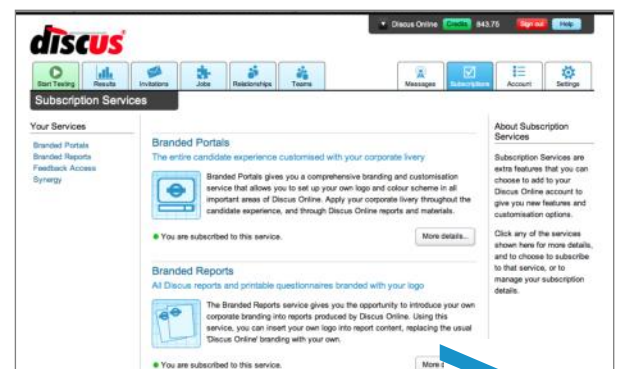


You can set up Discus Online to automatically remind you when your credit level drops below a certain amount. Click  the 'Account' tab, then choose 'Account details', and you'll find a 'Low Credit Warnings' section that allows you to set up a warning threshold.

Subscription services

Generally, creating DISC profiles is the only thing that your account will be charged for - almost all of Discus Online's other features are completely free and unlimited to use.

The main exceptions are *subscription services* that provide optional value-added features to your account. For example, you can use these services to brand your candidate experience with your own logo and colour scheme, create branded questionnaires, or unlock other features.

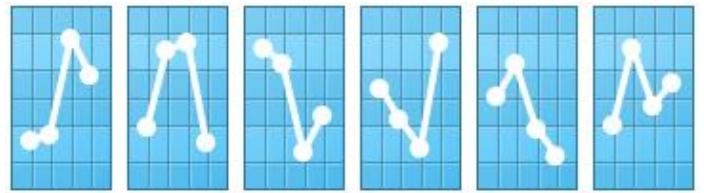


To explore Discus Online's subscription services, just click the green 'Subscriptions' icon on the tab bar.



Creating a DISC profile

The 'DISC Profile' is the basis of the way Discus Online analyses human behaviour. It's an assessment of four factors in an individual style - Dominance, Influence, Steadiness and Compliance, hence the name 'DISC'. These four factors in a personality are shown on a 'DISC graph', and you can see some example graphs opposite.

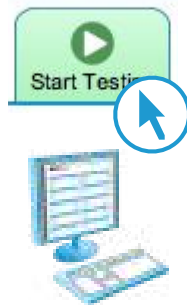


This Quick Start Guide doesn't go into detail about DISC theory, but plenty of reference information is available from Discus Online's Help menu.

1

Click the green 'Start Testing' tab, then the 'Begin Questionnaire' button.

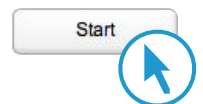
Depending on your settings, you may see a page of options at this point. If so, just click 'Begin' to move on.



2

The next step is to complete a selection of Candidate Details. Only a few of the items shown need to be entered, and they are labelled in **bold** text.

When the form is complete, click 'Start' to move on.



3

Next, you'll see a brief set of guidelines, and it's important that the person completing the questionnaire understands these before continuing.

Click 'OK' to move on to the DISC questionnaire itself.

4

The questionnaire consists of twenty-four questions like this one. To answer each question, click once in the 'Most' column and once in the 'Least' column.

After answering each question, click the 'Next' button to move on.



What happens after a questionnaire depends on your settings. If you don't see a report immediately, just go to your Homepage: you'll find a link to the report you just created in the middle of the page.



Inviting a candidate

As well as creating a DISC profile directly, as we saw on the previous page, Discus Online can also provide questionnaires across the Internet for candidates to complete remotely.

To do this, it will create a unique account number and password that a candidate can use to sign in to a questionnaire on the separate site remote.discusonline.com.

There is no charge for setting up invitations.

Your Discus Online account will only be charged when, or if, the candidate responds to your invitation and actually completes the questionnaire.

1

Click the 'Start Testing' tab to begin the Invitation process.

Click the 'Invite Candidate(s)' button, and Discus Online will open a new 'Invite a Candidate' page so that you can set up the invitation.



2

Choose the report level you want to create from the questionnaire, and also whether you want the candidate to be able to view their own report.



There are plenty more Optional Settings on the page, too - see the Help for full details.

3

Discus will automatically send a notification of the invitation to the candidate. You just need to enter the candidate's name and e-mail address.

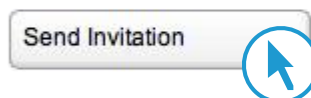
Candidate name

Candidate e-mail address or addresses

For multiple e-mail addresses, enter each address on a new line, or separate them with commas.

4

Click 'Create' to set up the invitation, and to send an e-mail.



When you create the invitation, you'll be shown the account number, password, and other details the candidate will need to open their questionnaire.

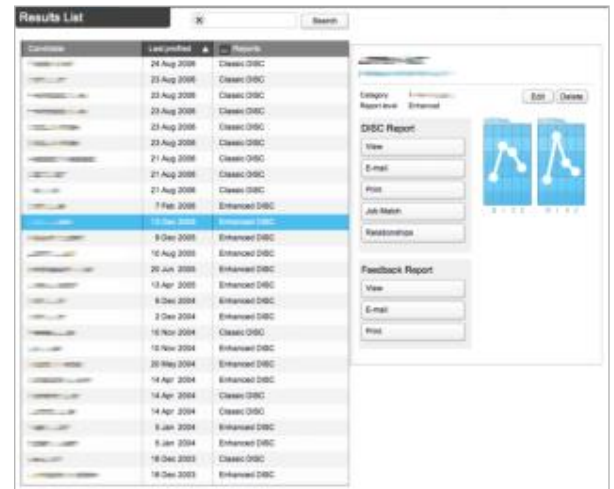
When an invited profile is complete, the results will appear immediately in Discus Online, just as if the questionnaire had been completed directly through the site.

Finding results

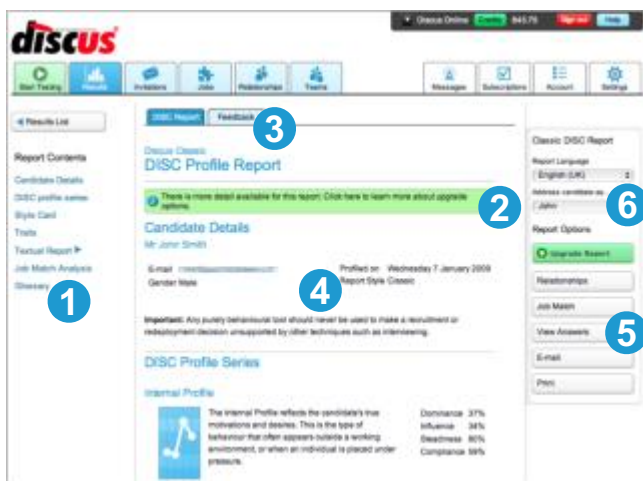
Each DISC profile you create is stored in your own online database, and you can open that database by clicking the Results tab.

You can search or sort the list to find results you want, and click individual entries in the list to see a summary of their profile information.

To open a full report, either double-click the candidate in the list, or choose 'DISC Report' from the menu on the right.



Inside a Discus Online report



If you're unsure about any of the terms used in the report, click 'Glossary' in the Report Contents. This will open a customised glossary explaining all the technical or specialised terms used.

Remember that you can also choose 'About this page' from the Help menu for an explanation of all the report's contents.

- 1 Use these Report Navigation links to move directly to different parts of the report.
- 2 If your report is below Enhanced level, you can use this 'Upgrade' button to add more content to the report.
- 3 A Feedback Report is a special report designed to give feedback to a candidate. Feedback reports are free in Enhanced reports, but otherwise need to be unlocked.
- 4 This is the main report area; scroll through this content or use Report Navigation to see the report's contents.
- 5 These Selected Profile Options are commands used to work with the report or the candidate. For instance, you can create a printable PDF from here.
- 6 Use these Report Display Options to change the report's language, or the way it addresses the candidate.

Discus Online gives you the ability to compare a candidate's style against the ideal for any role or job. To do this, you will need a Job Profile (a DISC-based description of the ideal personality style for a job).

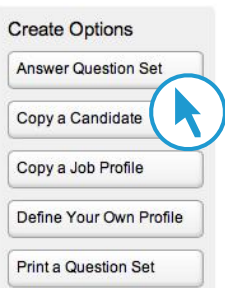
Discus Online provides a library of basic Job Profile templates, but it is recommended that you use the 'Jobs' tab to design a new Job Profile for each role you want to assess.

Job Profiling and Job Matching are both free and unlimited in Discus Online. You can create as many new Job Profiles as you like, and match as many candidates as you need at no extra charge.

1

We'll concentrate here on creating a profile through a simple Job Profile Question Set.

To get started, go to the Jobs tab, choose 'Answer Question Set' in the Create Options.



2

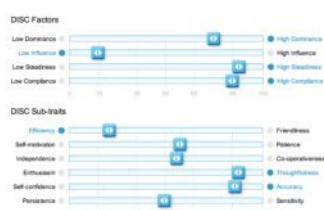
Discus Online will move on to show you a set of twenty-four questions. These work just like those in a normal DISC test, except that they ask you to describe the most important (and least important) aspects of the job you are profiling.

When you answer the final question, Discus Online will use your selections to create a new Job Profile.

3

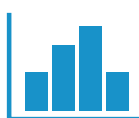
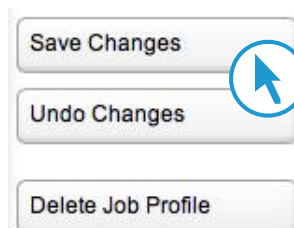
When you complete the final question, you'll need to give the Job Profile a name and a category so that it can be saved.

If you're an experienced DISC user, you can also choose to fine-tune your profile by adjusting its factors and traits using the interactive sliding controls provided.



4

When you're satisfied with your Job Profile's settings, click 'Save Job Profile' in the Options menu to store it in the library.



To use your new Job Profile, go to the 'Results' tab, choose a candidate and open their report.. Select 'Job Matches' in the Selected Profile Options, and find your new Job Profile in the list. Discus Online will create an assessment of the candidate's suitability - specifically in terms of personality - for the job you described in that Job Profile.



Discus Online can create a Relationship Assessment report for almost any pair of profiles on your database through the 'Relationships' tab.

As long as you have at least two profiles on your database, Discus Online will select the most recently created to produce an initial report. From there, you can view relationship reports for any combination of candidates.

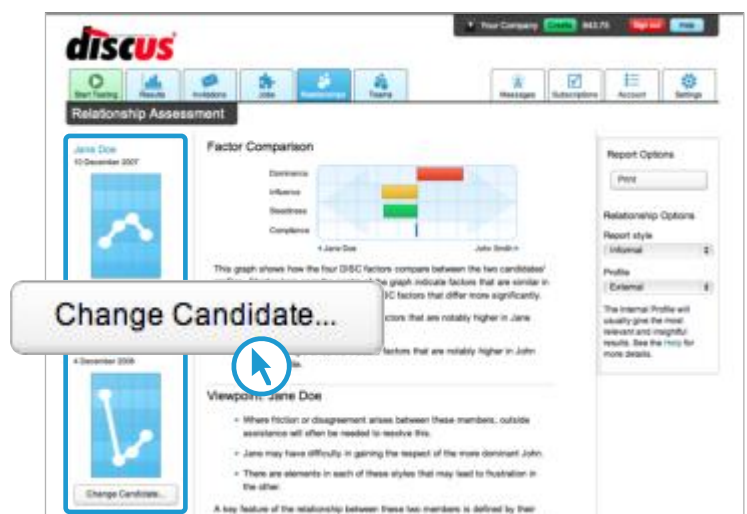
Relationship assessment is free and unlimited for profiles at the Classic level or higher.

Naturally, you'll need at least two suitable profiles in your database before you can create a relationship report.

Choosing candidates

On each side of the Relationships page, you'll see a panel describing one of the two candidates concerned. Under each is a button labelled 'Change candidate...'

Click that button for a searchable list of all the candidates in your database. Choose any candidate from that list, and Discus Online will recreate the relationship assessment using your new selection.



Inside a relationship assessment



The Factor Comparison shows how the two DISC profiles compare with one another. Longer bars shown greater differences, and the direction of each bar shows which candidate has the higher value for that DISC factor.

The rest of the assessment report is broken down into two 'Viewpoint' sections, relating to each of the two candidates.

In most cases, a working relationship will be view differently by the two personalities involved - sometimes in radical ways - and so the assessment report looks at the working relationship from the perspective of each of the individuals involved.

Discus Online can go beyond looking at working relationships to assess entire teams of candidates. If you want to explore the ways a group of different people will work together as a team, click Discus Online's 'Teams' tab.

There's no charge for using the Team Assessment service, but of course you will need a DISC profile for each of the members you want to include in a team.

Building your first team

1

Choose the 'Teams' tab and click 'New Team' in the Team Options menu.

Choose a suitable name for your new team, then click 'OK' to create a new, blank team with that name, ready for you to add a profile for each member.

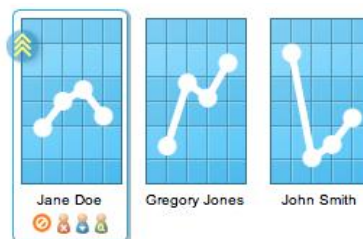
2

For each member you want to add to the team, click 'Add member' to choose a candidate from your database. Be sure to add at least two members to your team.

+ Add member

3

If your team has a leader, click that leader's profile to select it, then click the 🟡 icon to mark that profile as the team's leader.



Inside a team report

Members Report



As long as you have at least two members in your team, you can see a team report at any time. Just click the 'Report' tab to the top right of your team members.

After taking a moment to compile the results, Discus Online will display a detailed team report covering all the different aspects of the team.

A Discus Online team report covers all of these topics:



- Team Structure
- Team Keynotes
- Team Profile
- Key Team Dynamics
- Team Subfactors
- General Leadership Style
- Leadership Demands
- Emergent Leadership Candidates
- Team Role Breakdown