|  |
| --- |
| **AIMS User Manual** |
| aims.im4hc.com |
|  |
| AIMS enhance organizational working efficiency in collaborative environment. This document is to facilitate you to use AIMS easily. AIMS is an easy-to-use assessment tool builder geared towards the specific needs of the humanitarian sector. |
|  |
| **AIMS powered by CARD©** |
| **9/18/2012** |
|  |

Table of Contents

[1. Getting Started/Start with AIMS 6](#_Toc336522316)

[i. How to get AIMS account 6](#_Toc336522317)

[ii. Payment Methods 6](#_Toc336522318)

[2. Create an Assessment 6](#_Toc336522319)

[i. Create a new Assessment 6](#_Toc336522320)

[1. Where to begin 6](#_Toc336522321)

[2. How to Add Questions 6](#_Toc336522322)

[3. How Section Works 7](#_Toc336522323)

[4. Preview Assessment 7](#_Toc336522324)

[5. Print Assessment 7](#_Toc336522325)

[ii. Create Assessment from Templates 7](#_Toc336522326)

[1. Search a Template from AIMS collection 7](#_Toc336522327)

[2. How to Import a Template 7](#_Toc336522328)

[3. How to Edit Template 8](#_Toc336522329)

[4. Delete a template 8](#_Toc336522330)

[iii. Question types and Properties 8](#_Toc336522331)

[1. Question Types 8](#_Toc336522332)

[2. Properties 9](#_Toc336522333)

[3. Delete Question 10](#_Toc336522334)

[4. Duplicate [copy] Question 10](#_Toc336522335)

[5. Edit Question 10](#_Toc336522336)

[6. Comment a Question 10](#_Toc336522337)

[7. Mark Question as Required Field 10](#_Toc336522338)

[iv. Section types and their features 11](#_Toc336522339)

[1. Section Types 11](#_Toc336522340)

[2. Properties 11](#_Toc336522341)

[v. Form (Assessment) Properties 11](#_Toc336522342)

[1. Assessment Theme 11](#_Toc336522343)

[2. Question numbering 11](#_Toc336522344)

[3. Option Style (Only for radio button and check box) 11](#_Toc336522345)

[4. Form Image (Banner) 12](#_Toc336522346)

[5. Welcome Message 12](#_Toc336522347)

[6. Close Message 12](#_Toc336522348)

[7. Survey Identifier 1 12](#_Toc336522349)

[8. Survey Identifier 2 13](#_Toc336522350)

[9. Survey Identifier 3 13](#_Toc336522351)

[vi. Search and Import Questions and Sections 13](#_Toc336522352)

[1. Search & Import Question from AIMS collection 13](#_Toc336522353)

[2. Search & Import Section from AIMS collection 13](#_Toc336522354)

[3. Search & Import Assessment from AIMS collection 13](#_Toc336522355)

[vii. Tag Your Question, Sections and Assessments 13](#_Toc336522356)

[1. Tag Question 13](#_Toc336522357)

[2. Tag Section 13](#_Toc336522358)

[3. Tag Assessment (form) 14](#_Toc336522359)

[4. Search Assessment by Tags 14](#_Toc336522360)

[viii. Apply Rules and Logics 14](#_Toc336522361)

[1. How to apply Rules and Logic 14](#_Toc336522362)

[ix. Mark your Assessment a Template 14](#_Toc336522363)

[1. How to Mark Assessment a Template 14](#_Toc336522364)

[x. Save Assessment 15](#_Toc336522365)

[2. How to Save Assessment 15](#_Toc336522366)

[xi. Edit Saved Assessment 15](#_Toc336522367)

[3. Collaborate with Members 15](#_Toc336522368)

[i. Simple and advanced Search Draft Assessment 16](#_Toc336522369)

[ii. Share Assessment within Organization 16](#_Toc336522370)

[iii. Share Assessment with anonymous user 16](#_Toc336522371)

[iv. Share Assessment inter Organizations 16](#_Toc336522372)

[v. Add more users for Collaboration 16](#_Toc336522373)

[vi. Assign Edit Rights to a user 16](#_Toc336522374)

[vii. Add Comments on shared Draft Assessment 17](#_Toc336522375)

[viii. View other members/users Comments on shared Assessment 17](#_Toc336522376)

[ix. Edit Draft Assessment 17](#_Toc336522377)

[x. Preview &Print Draft Assessment 17](#_Toc336522378)

[xi. Duplicate Draft Assessment 18](#_Toc336522379)

[xii. Delete Drat Assessment 18](#_Toc336522380)

[xiii. Publish a Draft Assessment 18](#_Toc336522381)

[4. Collect Responses 18](#_Toc336522382)

[i. How to Publish an Assessment 18](#_Toc336522383)

[ii. Simple and Advanced Search Published Assessment 19](#_Toc336522384)

[iii. Support for Manual Data Entry 19](#_Toc336522385)

[iv. Collect Responses online 19](#_Toc336522386)

[v. Collect via PDA (android) 19](#_Toc336522387)

[vi. Create Duplicate of Published Assessment 19](#_Toc336522388)

[vii. Allow Specific users to collect response 20](#_Toc336522389)

[viii. Allow specific users for Data Cleaning 20](#_Toc336522390)

[ix. Allow Smart phone Collection 20](#_Toc336522391)

[x. Add more users for data Collection from Collect 20](#_Toc336522392)

[xi. Send Assessment to anonymous user to collect response 21](#_Toc336522393)

[xii. Attach Assessment web link on your website 21](#_Toc336522394)

[xiii. Delete Assessment 21](#_Toc336522395)

[5. Data Cleaning 21](#_Toc336522396)

[i. Search assessment for Cleaning 21](#_Toc336522397)

[ii. Verify Response 22](#_Toc336522398)

[iii. Approve Response 22](#_Toc336522399)

[6. Analyze results 22](#_Toc336522400)

[i. Search an Assessment Report Analysis 23](#_Toc336522401)

[ii. Report Summary 23](#_Toc336522402)

[1. Summary Report Options 23](#_Toc336522403)

[*2.* Report Summary Filter 23](#_Toc336522404)

[3. Create Custom Report 24](#_Toc336522405)

[iii. Detailed Analysis Report 24](#_Toc336522406)

[1. Apply Filters 24](#_Toc336522407)

[2. Summarized by: Count, Sum, Average, Count Percentage, Sum Percentage 25](#_Toc336522408)

[3. Create Custom Reports 25](#_Toc336522409)

[iv. Share Reports with Users 26](#_Toc336522410)

[v. Share Reports with anonymous Users 26](#_Toc336522411)

[vi. Attach Web-Link of Analysis Report on web site 26](#_Toc336522412)

[vii. Add more users for Assessment result analysis 26](#_Toc336522413)

[7. Reports 27](#_Toc336522414)

[i. Search an Assessment Report 27](#_Toc336522415)

[ii. Refresh Reports Page 27](#_Toc336522416)

[iii. Share Report with user of the organization 27](#_Toc336522417)

[iv. Share Report with anonymous user 28](#_Toc336522418)

[v. Add more users for Assessment Reports 28](#_Toc336522419)

[vi. Edit Report 28](#_Toc336522420)

[vii. Delete Reports 29](#_Toc336522421)

[8. Export Data 29](#_Toc336522422)

[i. Export all responses of Assessment to MS Excel Sheet 29](#_Toc336522423)

[9. Manage Users 29](#_Toc336522424)

[i. Create user/Add User 29](#_Toc336522425)

[ii. Assign Tasks 30](#_Toc336522426)

[iii. Edit User Tasks 30](#_Toc336522427)

[iv. View User Profile 30](#_Toc336522428)

[v. Delete User 30](#_Toc336522429)

[vi. Manage Groups 30](#_Toc336522430)

[10. My Profile 31](#_Toc336522431)

[i. How to create profile 31](#_Toc336522432)

[ii. Update Profile 31](#_Toc336522433)

[11. Other Options 31](#_Toc336522434)

[i. Resize 31](#_Toc336522435)

[ii. Remove Theme 31](#_Toc336522436)

[iii. Change Password 31](#_Toc336522437)

[iv. Help 32](#_Toc336522438)

[v. Sign-Out 32](#_Toc336522439)

[12. Apply a Theme 32](#_Toc336522440)

[13. Conclusion 32](#_Toc336522441)

# Getting Started/Start with AIMS

## How to get AIMS account

Send Your Account request to [info@im4hc.org](mailto:info@im4hc.org) to get your AIMS account. Our Team will create your account and will inform you back on your E-mail address.

## Payment Methods

# Create an Assessment

Using AIMS, you use a simple and intuitive web browser interface to quickly and effortlessly create assessments. You can do drag-and-drop questions onto you assessment without the need for any specialist support. A process that takes less than 2 minutes to master – the drag-and-drop approach to making assessments automatically creates a database of assessment questions that can range from simple to highly complex.

AIMS managed assessment can vary from simple textual answers to answers using images, multi-choice answers and a lot more. A rich set of question types comes ready-made with AIMS, so you can easily create an assessment that matches field requirements and needs.

## Create a new Assessment

You can create an assessment by via methods first is to create an assessment from scratch and other is to create Assessment by using AIMS template.

### Where to begin

*Please follow these steps to start creating an assessment with AIMS from scratch.*

* Click create
* Select Create New Assessment

### How to Add Questions

*Please follow these steps to add Questions to an assessment*

* Click Standard Tools
* Drag and drop Question to the form builder Default Section
* Click on Question Default Statement to Edit it, Edit it and Press enter to save the question

### How Section Works

*Please follow these steps to add Section to an assessment*

* Click Create New assessment
* Click *“Add New Section”* at top Left corner of form builder, Type Section name and its description and press Save.

OR

* Click At the name of Section*(Default section)* and edit section name and press Save

### Preview Assessment

*Please follow these steps to add Section to an assessment*

* Click “Print Preview” at the top of the form builder
* Click print to take print of the newly created Assessment.

### Print Assessment

*Please follow these steps to print an assessment*

* Once you create an Assessment take preview of it and press Print button to take hard copy of it.

## Create Assessment from Templates

You can create an Assessment by using AIMS Templates according to your requirement

### Search a Template from AIMS collection

*Please follow these steps to search an assessment from AIMS Templates collection*

* Click Create from Template
* Click Template from everything, Templates, Forms and Tags at the top of the templates page.
* Type the Name of the Assessment in the search Bar and press Enter
* Click At the name of the Assessment to preview it

### How to Import a Template

*Please follow these steps to Import an AIMS Template*

* Click Create from Template
* Click Template from everything, Templates, Forms and Tags at the top of the templates page.
* Type the Name of the Assessment in the search Bar and press Enter
* Click At the name of the Assessment to preview it
* Click Import button at the right side of the Template Name to Import it

### How to Edit Template

*Please follow these steps to Edit an AIMS Template*

* Once you Import a Template it will be opened in the Form builder Add, edit or delete Questions, Add, edit or delete Sections or change Question properties.

### Delete a template

*Please follow these steps to Delete an AIMS Template*

* Search a Template by using the above mentioned method
* Press Delete (Cross) button at right side of the template name

## Question types and Properties

AIMS categorize Questions [tools] into three groups Standard Tools, Quick Tools and Power Tools. Where *Standard Tools* are Header, Single Line Text, Multi Line Text, Number, Radio Button, Check Box, Date and Drop Down List. Quick Tools are True/False, Yes/No, Address, Phone and Administrative Area. Power Tools are star Rating, Scale Rating, Attach File, Matrix, Capture Image and Capture Location.

### Question Types

*Following are the Questions in the Standard Tools*

* Header: To Make a note
* Single Line Text : To take one line text response
* Multi Line Text: To take paragraph
* Number: To take numerical value
* Radio Button: Select only One Option
* Check Box: Select Multiple options as Response
* Date: Calendar Tool
* Drop Down List: Select One option From list of Options

*Following are the Question Types in the Quick Tools*

* True/False:
* Yes/No:
* Address:
* Phone:
* Administrative Area:

*Following are the Questions in the Power Tools*

* Star Rating:
* Scale Rating:
* Attach File:
* Matrix:
* Capture Image:
* Capture Location:

### Properties

*Following are the Questions Properties in the Standard Tools*

* **Header:** Header Font Size
* **Single Line Text:** Maximum Length, Data Type, Default Value and Help Text
* **Multi Line Text:** Maximum Length, Data Type, Default Value, Help Text
* **Number:** Minimum Length, Maximum Length, Default Value and Help Text
* **Radio Button:** Enable Other Text Field, Help Text
* **Check Box:** Enable Other Text Field, Maximum number of options selection and Help Text
* **Date:** Date Format, Default Value and Help Text
* **Drop Down List:** Options

*Following are the Question properties in the Quick Tools*

* **True/False:**
* **Yes/No:**
* **Address:**
* **Phone:**
* **Administrative Area:**

*Following are the Questions in the Power Tools*

* **Star Rating:**
* **Scale Rating:**
* **Attach File:**
* **Matrix:**
* **Capture Image:**
* **Capture Location:**

### Delete Question

*Please follow these steps to Delete a Questions.*

* Start an Assessment
* Add a question
* At most right side of the question there is a delete(Cross) button
* Press cross button

### Duplicate [copy] Question

*Please follow these steps to Duplicate a Questions.*

* Start an Assessment
* Add a question
* At right side of the question there is a duplicate(Copy) button
* Press ***Copy*** button

### Edit Question

*Please follow these steps to Edit a Questions (Not applicable for Quick Tools and Capture Image)*

* Start an Assessment
* Add a question
* At right side of the question there is a Edit(Pencil) button
* Press ***Edit*** button
* Select Properties
* Press Save button

### Comment a Question

*Please follow these steps to Comment a Questions*

* Start an Assessment
* Add a question
* At right side of the question there is a Comment button
* Press ***Comment*** button
* Add a comment
* Press *Publish*

### Mark Question as Required Field

*Please follow these steps to Mark a Question as required field (not applicable for Matrix Question)*

* Start an Assessment
* Drag and drop a question on Assessment
* At right side of the question there is a Required field (Star) button
* Press *Required field* button

## Section types and their features

### Section Types

*Following are the Questions in the Power Tools*

* Default Section
* Matrix Section

### Properties

*Following are the Questions in the Power Tools*

* Edit Section name and Description
* Delete Section
* Make Section A Matrix

## Form (Assessment) Properties

### Assessment Theme

### Question numbering

AIMS user can number questions of Assessment and also can disable numbering of Question

*To Disable Question numbering please follow these steps*

* Click Create
* Select Create New Assessment
* Click Form Properties
* Select No From Question Numbering
* Press OK

### Option Style (Only for radio button and check box)

AIMS facilitates you to choose option style of your choice

*Please follow these steps to change option style (radio button and check boxes)*

* Click Create
* Select Create New Assessment
* Click Form Properties
* Select one style from **Option Style** Drop Down
* Press OK

### Form Image (Banner)

There is facility in AIMS to Apply Banner on your assessment.

*Please follow these steps to Apply Banner to your Assessment*

* Click Create
* Select Create New Assessment
* Click Form Properties
* Select Banner Image From Your Computer
* Press OK

### Welcome Message

You can write your own type welcome message to your collector at start of each response

*Please follow these steps to change option style (radio button and check boxes)*

* Click Create
* Select Create New Assessment
* Click Form Properties
* Enter Welcome Message in Welcome Message Box
* Press OK

### Close Message

You can write your own type Close message to your collector at End of each response

*Please follow these steps to change option style (radio button and check boxes)*

* Click Create
* Select Create New Assessment
* Click Form Properties
* Enter Close Message in Close Message Box
* Press OK

### Survey Identifier 1

### Survey Identifier 2

### Survey Identifier 3

## Search and Import Questions and Sections

You can Search and import Questions and section From AIMS collection.

### Search & Import Question from AIMS collection

### Search & Import Section from AIMS collection

*Please Follow these steps to Import Section from AIMS Collection*

* Start an Assessment
* Click on Search and import
* Select Sections
* Click on the name of the Assessment section to preview it
* Press Import to import the Complete section for your Assessment

### Search & Import Assessment from AIMS collection

## Tag Your Question, Sections and Assessments

### Tag Question

*Please follow these steps to Tag a Question of your Assessment*

* Start a new Assessment
* Drag and drop a Question
* Press View/Add Tags
* Click on blue Book Mark Icon on the left side of the Question
* Add Tag
* Press Submit Query

### Tag Section

*Please follow these steps to Tag a Section of your Assessment*

* Start a new Assessment
* Press View/Add Tags
* Click on blue Book Mark Icon on the left side of the Section Name
* Add Tag
* Press Submit Query

### Tag Assessment (form)

*Please follow these steps to Tag your Assessment*

* Start a new Assessment
* Press View/Add Tags
* Click on blue Book Mark Icon on the left side of the Assessment Name
* Add Tag
* Press Submit Query

### Search Assessment by Tags

## Apply Rules and Logics

### How to apply Rules and Logic

*Please follow these steps to Apply Rules and Logics on your Assessment*

* Start an Assessment
* Drag and drop Two Question
* Click Rules and Logic
* Select one question from if drop down
* Select Condition
* Select value
* Select Jump From Then Drop Down
* Select other Question to jump on
* Press Add new Rule
* Press Save

## Mark your Assessment a Template

AIMS lets you optionally use questions from templates and past assessments to quickly build a relevant and effective assessment. To use questions from past assessments conducted by your own organization as well as other NGOs, simply add an existing question using an intuitive user interface for finding relevant questions.

### How to Mark Assessment a Template

*Please follow these steps to Mark your Assessment as Template*

* Start an Assessment
* Drag and drop Questions
* Click Mark As Template
* Enter its Name
* Enter its Category
* Press Save

## Save Assessment

### How to Save Assessment

*Please follow these steps to Save your Assessment*

* Start an Assessment
* Drag and drop Questions
* Click Save/Close
* Enter its Name
* Click Save/Close
* Press Save or Discard if you don’t want to save it.

## Edit Saved Assessment

*Once you saved your Assessment Please follow these steps to Edit Saved Assessment*

* Select Collaborate
* Select your Assessment to view it
* Click Edit(Pencil) button below to Assessment name
* Edit Assessment by adding, Deleting, updating Questions and Sections etc.
* Click Save/Close to save Assessment again.
* Press Save or Discard if you don’t want to save it.

# Collaborate with Members

AIMS solved problems by allowing your assessment partners and collaborators to join you right on the assessment draft in AIMS and give feedback in one central location: The assessment draft itself. You can easily share your draft assessment link with your assessment collaborators who can provide suggestions and feedback against each question you’ve drafted. By bringing all parties to the same virtual table, you can finalize an assessment draft in hours instead of weeks!

## Simple and advanced Search Draft Assessment

## Share Assessment within Organization

*Once you saved your Assessment Please follow these steps to Share Saved Assessment with users (within organization)*

* Select Collaborate
* Click Settings of your Assessment
* Check the Users to Collaborate
* Press OK button

## Share Assessment with anonymous user

*Please follow these steps to Share Saved Assessment with Anonymous users (within organization)*

* Select Collaborate
* Click Settings of your Assessment
* Enter valid email address of anonymous user(who is not AIMS user)
* Press OK

## Share Assessment inter Organizations

You can invite your partners and collaborators to any assessment created in AIMS. You can use the collaboration feature to gather feedback on your assessments from your assessment partners.

To enable collaboration with partners, you simply send a web link to your assessment. Your assessment partners can then view the draft assessment and give their feedback on each question contained in the assessment. This allows you to quickly finalize an assessment draft without having to manually gather feedback from each assessment partner.

## Add more users for Collaboration

*Please follow these steps to Add new user to collaborate with you*

* Select Collaborate
* Click Settings of your Assessment
* Click Add New user
* Click Add or create new user
* Click Add new user from new window
* Press Add

## Assign Edit Rights to a user

*Please follow these steps to allow edit rights to user (within organization)*

* Select Collaborate
* Click Settings of your Assessment
* Select one user by selecting radio button at the right side of user name
* Press OK button

## Add Comments on shared Draft Assessment

*Please follow these steps to add comments on shared Assessment*

* Select Collaborate
* Click at the name of your Assessment in third pane Assessment will be displayed
* Click Expand(aero) Button From Third pane
* Click Comment Button
* Add Comment
* Press POST button to post it

## View other members/users Comments on shared Assessment

*Please follow these steps to add comments on shared Assessment*

* Select Collaborate
* Click at the name of your Assessment, it will be displayed in third pane
* Click Expand(aero) Button From Third pane [placed at top]
* Click Comment Button

## Edit Draft Assessment

*Once you saved your Assessment Please follow these steps to Edit Saved Assessment*

* Select Collaborate
* Select your Assessment to view it
* Click Edit(Pencil) button below to Assessment name
* Edit Assessment by adding, Deleting, updating Questions and Sections etc.
* Click Save/Close to save Assessment again.
* Press Discard if you don’t want to save it.

## Preview &Print Draft Assessment

*Please follow these steps to add Preview and Print Draft Assessment*

* Select Collaborate
* Click at the name of your Assessment, it will be displayed in third pane
* Click Expand(aero) Button From Third pane [placed at top]
* Click Print page Button

## Duplicate Draft Assessment

*Please follow these steps to Duplicate Draft Assessment*

* Select Collaborate
* Click Duplicate Button Below to the Assessment name
* Enter New name
* Press OK

## Delete Drat Assessment

*Please follow these steps to Delete Draft Assessment*

* Select Collaborate
* Click Delete(Cross) Button Below to the Assessment name
* Press Delete

## Publish a Draft Assessment

*Please follow these steps to Publish Draft Assessment*

* Select Collaborate
* Click Edit Button which available below to the name of the Assessment
* Press Collect (Globe) Button
* Enter/Select Expiry Date
* Press OK

# Collect Responses

AIMS offers fast, efficient data gathering using smart phones. The AIMS mobile component sits on an agent’s mobile phone and gives her the ability to collect data quickly and efficiently – thus reducing the time and cost involved in data gathering – as well as improving the integrity and accuracy of the data collected.

Where using smart phones to collect assessment data is not feasible, AIMS also supports gathering assessment data through traditional paper-based forms. The agents can collect data in the field and the data can be entered into the AIMS system through a traditional PC.

## How to Publish an Assessment

*Please follow these steps to Publish Assessment*

* Start an Assessment
* Create an Assessment/Add Questions and Section
* Press Collect (Globe) Button
* Enter Expiry Date
* Press OK

## Simple and Advanced Search Published Assessment

## Support for Manual Data Entry

Where conducting mobile phone based assessments is not an option, AIMS also supports gathering assessment data using traditional paper-based assessments. You can subsequently enter the data into the AIMS by using convenient browser-based pages for inputting data.

## Collect Responses online

*Once you published an Assessment Please follow these steps to Collect Response Online*

* Create an Assessment
* Select Collect
* Click at the name of the Assessment
* Add response
* Press Save and Close

## Collect via PDA (android)

Once an assessment has been approved in AIMS, agents in the field can use mobile phones to gather assessment data. Using mobile phones to gather is both faster and less error-prone – especially in high sensitivity areas and populations. Data gathered in the field can then be imported into the AIMS system by means of a PC.

*Please follow these steps to collect response via Smart phone*

* Download AIMS apk from AIMS website (aim.im4hc.org) [AIMS Android Application](http://aims.im4hc.com/Files/AIMS.apk)
* Install Application
* Open Aims Collect
* Login
* Press Get from Server
* Start Survey
* Add all Responses
* Send to server

## Create Duplicate of Published Assessment

*Please follow these steps to Duplicate Published Assessment*

* Select Create
* Click Duplicate Button Below to the Assessment name
* Enter New name
* Press OK

## Allow Specific users to collect response

*Once you published your Assessment please follow these steps to Share Assessment with users (within organization)*

* Select Collect
* Click Settings of your Assessment
* Check the Users to Collect
* Press OK button

## Allow specific users for Data Cleaning

*Once you published your Assessment please follow these steps to Share Assessment with users (within organization)*

* Select Collect
* Click Settings of your Assessment
* Select ***Clean*** tab
* Check Users for Data cleaning
* Press OK

## Allow Smart phone Collection

*Once you published your Assessment please follow these steps to Share Assessment with users (within organization)*

* Select Collect
* Click ***smart phone*** button available below to the assessment name
* Click Settings
* Check Users for collection
* Press OK

## Add more users for data Collection from Collect

*Please follow these steps to add New User to AIMS directory*

* Select Collect
* Click Settings of your Assessment
* Click add new user
* Press Create or Add New User
* Enter Email Id of user to search user in AIMS directory
* Press Not in Directory? Add New User
* Enter Full User Name
* Enter User Valid Email ID
* Press Add
* Click Add/view roles
* Check Collect From List
* Press Close of list

## Send Assessment to anonymous user to collect response

*Please follow these steps to send Assessment to anonymous user to collect response*

* Select Collect
* Click Settings of your Assessment
* Enter Email ID of Anonymous user in anonymous user ID box
* Press OK

## Attach Assessment web link on your website

*Please follow these steps to send Assessment to Attach Assessment Web-Link on your website*

* Select Collect
* Click Settings of your Assessment
* Copy web-Link and paste it on your website
* Press OK

## Delete Assessment

*Please follow these steps to send Assessment to Delete Assessment*

* Select Collect
* Click Delete Button
* Press Delete for Dialogue box

# Data Cleaning

AIMS supports integrated data cleaning, validation and integrity verification processes that streamline the process of validating field data. Using AIMS, you can not only reduce the time and effort involved in data validation but improve the workflow of these processes to ensure high data integrity.

## Search assessment for Cleaning

*Please follow these steps to search assessment for Cleaning*

* Select Clean
* Enter name of Assessment in Search Bar and Press Enter

AND

* Select ***For Approval*** from Select drop down list to search Assessments responses for Approval by Default it search responses for verification

*Please follow these steps to Advance search assessment for Cleaning*

* Create an Assessment
* Add Response for it
* Select Clean
* Press advance search button at most right side of the search Bar
* Press ***Title*** to sort Assessments in alphabetical order
* To sort Assessments by Create Date press ***Create Date***

## Verify Response

*Please follow these steps to Verify Responses*

* Create an Assessment
* Publish it
* Collect response for it
* Select Clean
* Click Assessment name
* Write Comment
* Press ***Verified*** if response is fine otherwise close the Tab

## Approve Response

*Please follow these steps to Approve a Responses*

* Create an Assessment
* Publish it
* Collect response for it
* Select Clean
* Select ***For Approval*** From –Select—Drop Down
* Click Assessment name
* Write Comment
* Press ***Approved*** if response is fine otherwise Press ***Return***

# Analyze results

AIMS offers rich reporting and analysis tools to help you accomplish this task. With its rich visualization of data points using geographical and political maps, you can quickly identify areas most in need of immediate assistance as well as use the data to gain insight into the specific problems being faced by the affected populations.

The primary goal of reporting and analysis functionality in AIMS is to help you formulate intelligent work plans for the target areas where the assessment was conducted.

## Search an Assessment Report Analysis

## Report Summary

AIMS supports integrated data cleaning, validation and integrity verification processes that streamline the process of validating field data. Using AIMS, you can not only reduce the time and effort involved in data validation but improve the workflow of these processes to ensure high data integrity.

*Please follow these steps to View Report Summary*

* Create an Assessment
* Publish it
* Collect response for it
* Select Analyze
* Click Assessment name
* Expand Third Pane

### Summary Report Options

AIMS facilitates you to show user as much data that you want, it could be either only cleaned data or all data, if you Select Cleaned Data then All users of your organization [those have rights of Report summary] will view All cleaned data Summary Report. AIMS By Default shows all data in Summary Report.

*Please follow these steps to View Only Cleaned Data in Summary Report*

* Create an Assessment
* Publish it
* Collect response for it
* Select Analyze
* Click Summary Report Below to the Assessment Name
* Click ***Options***
* Select Cleaned Data
* Press OK

### Report Summary Filter

*Please follow these steps to Apply Filter on AIMS Summary Report*

* Create an Assessment
* Publish it
* Collect response for it
* Select Analyze
* Click Summary Report Below to the Assessment Name
* Expand Report
* Click ***Filter***
* Select a ***Question*** From Question Drop down
* Select One From AND and OR
* Select Condition from Equal to, less than, greater than etc
* Select ***Option*** if the selected question was check box, radio button or drop down list Otherwise Select ***Value***
* Enter ***Value*** if you Select value
* Press Add

### Create Custom Report

*Please follow these steps to Create Custom Report from Summary Report*

* Create an Assessment
* Publish it
* Collect response for it
* Select Analyze
* Click Summary Report Below to the Assessment Name
* Expand Report
* Click ***Create Report***
* Enter Report Title & Description
* Edit Report If needed By just click and type
* Press ***Save*** Otherwise Press ***Back***

## Detailed Analysis Report

*Please follow these steps to View Detailed Analysis Report*

* Create an Assessment
* Publish it
* Collect response for it
* Select Analyze
* Click ***Detailed analysis Report***
* Expand Third Pane

### Apply Filters

*Please follow these steps to Apply filter on Detailed Analysis Report*

* Create an Assessment
* Publish it
* Collect response for it
* Select Analyze
* Click ***Detailed analysis Report***
* Expand Third Pane
* Select Question From ***Column*** Drop down
* Select Question From ***Row*** Drop down
* Press Add
* Press Remove if you add wrong row or column
* Select Question From ***Value*** Drop down
* Press Show

### Summarized by: Count, Sum, Average, Count Percentage, Sum Percentage

*Please follow these steps to Apply filter on Detailed Analysis Report*

* Create an Assessment
* Publish it
* Collect response for it
* Select Analyze
* Click ***Detailed analysis Report***
* Expand Third Pane
* Select Question From ***Column*** Drop down
* Select Question From ***Row*** Drop down
* Press Add
* Press Remove if you add wrong row or column
* Select Question From ***Value*** Drop down
* Select SUM
* Press ***Show***

### Create Custom Reports

*Please follow these steps to Apply filter on Detailed Analysis Report*

* Create an Assessment
* Publish it
* Collect response for it
* Select Analyze
* Click ***Detailed analysis Report***
* Expand Third Pane
* Select Question From ***Column*** Drop down
* Select Question From ***Row*** Drop down
* Press Add
* Press Remove if you add wrong row or column
* Select Question From ***Value*** Drop down
* Press ***Show***
* Press Create Report
* Enter Report Title
* Enter Description
* Enter Report Header
* Enter Report Footer
* Press ***View*** to preview Custom Report
* Press ***Save*** To save Report in Reports

## Share Reports with Users

*Please follow these steps to Share Reports with Users*

* Create an Assessment
* Publish it
* Collect response for it
* Select Analyze
* Click ***Settings***
* Expand Check names of the users
* Press OK

## Share Reports with anonymous Users

*Please follow these steps to Share Reports with Anonymous User*

* Create an Assessment
* Publish it
* Collect response for it
* Select Analyze
* Click ***Settings***
* Enter Valid E-Mail Id of anonymous user in anonymous user box
* Press OK

## Attach Web-Link of Analysis Report on web site

*Please follow these steps to Attach Report Web-Link to a Website*

* Create an Assessment
* Publish it
* Collect response for it
* Select Analyze
* Click ***Settings***
* Copy the Web-Link and attach it to web-site
* Press OK

## Add more users for Assessment result analysis

*Please follow these steps to add more users to Share Reports with them*

* Create an Assessment
* Publish it
* Collect response for it
* Select Analyze
* Click ***Settings***
* Click Add New User
* Press Add or Create New User
* Press Not in Directory? Add New User
* Enter Full name of the User
* Enter Valid Email Address(Login)
* Press Add

# Reports

## Search an Assessment Report

*Please follow these steps to Search an Assessment Custom Report*

* Create an Assessment
* Publish it
* Collect response for it
* Select Reports
* Enter name of the Report in search Bar
* Press Enter

*Please follow these steps to Search an Assessment Custom Report by title and Creating Date*

* Create an Assessment
* Publish it
* Collect response for it
* Select Reports
* Click Advance Search button placed at right side of the search bar
* Press Title

Reports will be sort in alphabetical order in response

OR

* Press Create Date

Reports will be sort By Creation Date in response

## Refresh Reports Page

## Share Report with user of the organization

*Please follow these steps to Share Reports with Users*

* Create an Assessment
* Publish it
* Collect response for it
* Select Reports
* Click ***Settings***
* Expand Check names of the users
* Press OK

## Share Report with anonymous user

*Please follow these steps to Share Reports with Anonymous User*

* Create an Assessment
* Publish it
* Collect response for it
* Select Reports
* Click ***Settings***
* Enter Valid E-Mail Id of anonymous user in anonymous user box
* Press OK

## Add more users for Assessment Reports

*Please follow these steps to add more add new user to view reports*

* Create an Assessment
* Publish it
* Collect response for it
* Select Reports
* Click ***Settings***
* Click Add New User
* Press Add or Create New User
* Press Not in Directory? Add New User
* Enter Full name of the User
* Enter Valid Email Address(Login)
* Press Add

## Edit Report

*Please follow these steps to Edit Custom report*

* Create an Assessment
* Publish it
* Collect response for it
* Select Reports
* Click Edit button below to the report name
* Edit Report
* Press Save

## Delete Reports

*Please follow these steps to Delete Custom report*

* Create an Assessment
* Publish it
* Collect response for it
* Select Reports
* Click Delete Button
* Press Delete

# Export Data

To address this need AIMS allows easy export of assessment data to SPSS as well as a spreadsheet. Support for spreadsheets means that the data can be quickly imported into external systems with only minimal tweaking required.

## Export all responses of Assessment to MS Excel Sheet

*Please follow these steps to Export Data of Assessment*

* Create an Assessment
* Publish it
* Collect responses for it
* Select Data
* Select Export
* Click at the name of Assessment you want to export
* Click Export in MS Excel

# Manage Users

## Create user/Add User

*Please follow these steps to Export Data of Assessment*

* After Log-in select Data
* Select Users
* Press Add or Create New User
* Press Not in Directory? Add New User
* Enter Full name of the User
* Enter Valid Email Address(Login)
* Press Add

## Assign Tasks

*Please follow these steps to assign Tasks to Use*

* After Log-in select Data
* Select Users
* Press Add or Create New User
* Press Not in Directory? Add New User
* Enter Full name of the User
* Enter Valid Email Address(Login)
* Press Add
* Press add / view rules
* Check roles you want to assign to this user

## Edit User Tasks

*Please follow these steps to Edit Assigned Tasks*

* Select Users
* Press add / view rules below to the user name and roles
* Check or uncheck roles assigned to the user
* Close the tasks list

## View User Profile

*Please follow these steps to Edit Assigned Tasks*

* Select Users
* Click at the name of the user

User profile will be opened in third pane

## Delete User

*Please follow these steps to Edit Assigned Tasks*

* Select Users
* Click at Delete (cross) button
* Press Delete

## Manage Groups

*Please follow these steps to Edit Assigned Tasks*

* Select Users
* Click Manage Groups
* In Front of each Task name there is “Rename” button Press **Rename**
* Enter New name
* Press Update

OR

* Press **Cancel** to stop Update

# My Profile

## How to create profile

*Please follow these steps to Create Profile*

* Log-in with valid user name and password
* There is an **Options** Drop Down at Top hover your mouse over **Options**
* Select My Profile
* Fill all field
* Press Update Profile

## Update Profile

*Please follow these steps to Update Profile*

* Log-in with valid user name and password
* There is an **Options** Drop Down at Top hover your mouse over **Options**
* Select My Profile
* Update required field
* Press Update Profile

# Other Options

## Resize

## Remove Theme

*Please follow these steps to Remove a Theme*

* Log-in with valid user name and password
* There is an **Options** Drop Down at Top hover your mouse over **Options**
* Select Remove Theme

## Change Password

*Please follow these steps to your Change Password*

* Log-in with valid user name and password
* There is an **Options** Drop Down at Top hover your mouse over **Options**
* Select Change Password
* Enter Old Password
* Enter New Password
* Enter again New password to Confirm it
* Press **Update**

## Help

## Sign-Out

*Please follow these steps to sign-out*

* Log-in with valid user name and password
* There is an **Options** Drop Down at Top hover your mouse over **Options**
* Select Sign-Out

# Apply a Theme

AIMS provides you a list of Themes You can apply a theme of your choice

*Please follow these steps to Apply Theme*

* Log-in with valid user name and password
* There is Themes Drop Down next to the Options Drop down
* Select a Theme

# Conclusion