Logging on

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| 1 | Using either Microsoft Internet Explorer or Google Chrome, go to <https://xxxx>xxxxxxxxx |
| 2 | Enter your User ID (email address) and Password. For URC employees the password is your regular network password |

Adding an Activity

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| 1 | Click on **Request** link in upper left side of screen. In the prompting dropdown, select **Add Activity** |
| 2 | Enter prompted activity information in the **Activity** area and click on the Save button |
| 3 | Once initial data entry is saved, additional areas are available to edit for **Aims & Indicators**, **Sites, and Notes.** |
| 4 | All **Activity** new entries will be assigned a **Pending** status until an IID Administrator reviews and approves the entry. |

Adding an Aim

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| 1 | On the Activity screen, in the **Aims & Indicators**, click on the Add Aim button |
| 2 | Enter name of Aim you want to add and click on the Save button |
| 3 | All **Aim** new entries will be assigned a **Pending** status until an IID Administrator reviews and approves the entry. |

Adding an Indicator

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| 1 | On the Activity screen, in the **Aims & Indicators**, click on the Add Indicator button |
| 2 | Enter prompted Indicator information in the Indicator area and click on the Save button |
| 3 | Once added, the Indicator screen will show all sites assigned to the indicator’s parent activity in the **Sites** area and will display all other Indicators for the parent activity in the **Other Indicators** area. |
| 4 | All **Indicator** new entries will be assigned a **Pending** status until an IID Administrator reviews and approves the entry. |

Adding a Site

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| 1 | Click on **Request** link in upper left side of screen. In the prompting dropdown, select **Add Site.** (Note: you can also add a site from the Site Search results grid by clicking the Add button ). |
| 2 | Enter prompted information in the Site area and click on the Save button |
| 3 | Once added, the Site screen will show the **Activities** the site is assigned to (initially new sites will not belong to any Activity) and also a **Notes** section to attach any further details about a site. Click the **Notes** Add button  present a popup screen to add a new note. |
| 4 | All **Site** new entries will be assigned a **Pending** status until an IID Administrator reviews and approves the entry. |

Adding a User

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| 1 | Click on **Request** link in upper left side of screen. In the prompting dropdown, select **Add User** |
| 2 | Enter prompted Indicator information in the User area and click on the Save button |
| 3 | Once added, the User screen will show **User Access** setting grids for all **Activities, Countries, Regions, and Sites.** Clicking on the Add button  in any grid will present a popup screen to assign an specific setting and a corresponding Access Type (View or Update). To assign select a setting and a type and click the Save button.  Users can have as many **User Access** as appropriate. |
| 4 | All **User** new entries will be assigned a **Pending** status until an IID Administrator reviews and approves the entry. |

Viewing request status

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| 1 | The status of any requests for **Aims, Activities, Indicators, Sites, and Users** can be viewed at any time. To do so, click on the **Requests** link in the upper left side of screen. In the prompting dropdown, select **My Requests** |
| 2 | All of your requests are displayed, grouped by **Aims, Activities, Indicators, Sites, and Users.** You can filter the display based on status by selecting/deselecting **Pending, Approved,** or **Denied** in the **Statuses** box |

Searching for activities or sites

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| 1 | Click on **Search** link in upper left side of screen. In the prompting dropdown, select either **Activity** or **Site** |
| 2 | Enter desired search criteria in the **Search options** and click the Search button |
| 3 | The search results will be displayed – clicking on individual item will take you to the detail screen for that entry |

Viewing Rank By Improvement for an activity

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| 1 | Go to the IID Home Page (click on **Home** link in upper left side of screen) |
| 2 | Find the Activity entry in the **Assigned Activities** or in **My Activities** and click on the Rank By Improvement icon |

Viewing Coach’s Report for an activity

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| 1 | Go to the IID Home Page (click on **Home** link in upper left side of screen) |
| 2 | Find the Activity entry in the **Assigned Activities** and click on the Coach’s Report icon |

Navigating to Chart Screen for an activity

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| 1 | Go to the IID Home Page (click on **Home** link in upper left side of screen) |
| 2 | Find the Activity entry in the **Assigned Activities** and click on the Chart icon |
| 3 | Select the desired **Chart Options** entry |

Working with charts

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| 1 | Select the desired **Chart Options** values for the initial line (Line 1) |
| 2 | Indicate whether or not Chart Rules should be applied via the **Run Chart Rules** checkbox |
| 3 | If additional lines are desired, click the Add Line icon  for a set of **Chart Options** for the new line |
| 4 | Click the Chart button to draw the chart line(s) as requested |
| 5 | To save the chart as defined, click on the Save icon . Once saved, the chart will appear in your **My Charts** grid on the Home page |
| 6 | To create and export an image of the chart, click the Export button |