



AIMS VERSION 3.6

aims

advice + information management system

aims
pre-configuration
guide

Document Version 3620
October 2008

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How to Use this Document

The Pre-Configuration guide has been written to help the person responsible for implementing AIMS within the organisation make some of the key decisions concerning its usage and configuration.

The pre-configuration guide asks you to consider the services your organisation offers, and how these are delivered. Your organisations working practices will lead you to make certain choices when configuring AIMS. This document is designed to help you with the thinking that is required before commencing that configuration.

The practical steps required to configure AIMS are covered in the User guide, available on the AIMS CD or download and loaded into the AIMS directory once the software has been installed. You will be referred back to the User guide through-out this document for advice on how to implement the changes you have decided upon.

This document should only be read after you have completed the “AIMS Demonstration Tour”, as you will need some familiarisation with the screens and functions mentioned through-out the discussions. If you have not already completed the AIMS Demonstration Tour, which can be found on the AIMS Demo CD or downloaded from our web site, you should print off the associated Word document and open the AIMS Demonstration now. The tour will give you an overview of the functionality available within AIMS Extra. If you are using the free AIMS Core Access version your system will look different from the Demo as it does not contain the advanced case management features.

Glossary of terms

Classifications:	The grouping into classes with a code list. E.g. B = Black, B1 = Caribbean B2 = African.
Code List:	The drop down list associated with a particular field. These can be amended by the systems Administrator. E.g. A = White, B = Black, C = Asian etc.
Configuration:	Making changes to code lists, switching fields off or creating new fields to make the original data base setting better match your requirements.
Default:	The original settings when you first load AIMS, and the ones that will apply if you do not make any changes. E.g. our age range choices or our description of different work activities.
Navigating:	Moving around the various fields and screens within the database.

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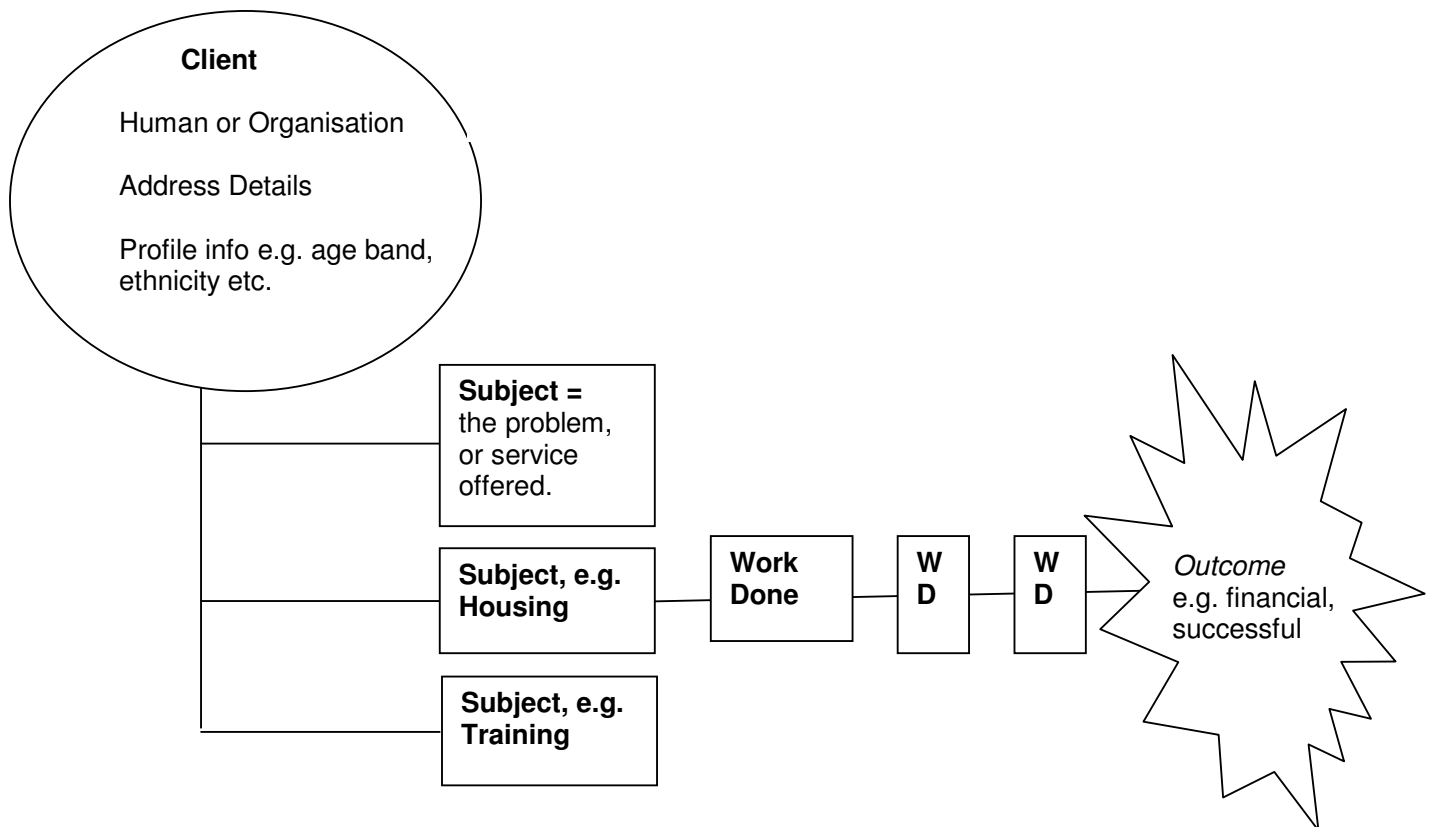
Outline of main AIMS data collecting screens

The figure below shows the four main information gathering parts of the Core system.

Clients who can be individuals or organisations have contact details and profile information. Profile data allows you to report in detail on the demographic make up of your client base.

Subjects are the name we give to describe the matter, issue, or problem you are working on with the client i.e. why they came to see you. The subject may also be the service or product you are providing, e.g. Lunch Club, Gardening Service or English Classes.

Fig A) AIMS Software, key components & structure



Work Done is where you provide details concerning any contacts you have with your clients and the work done on their behalf. In **Work Done** you can record who the worker was, what they did, when they did it, and how long it took them, e.g. Susan made 3 telephone calls lasting a total of 25 minutes.

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Outcomes describe the results associated with a particular Subject for that Client. You can add more than one outcome per subject and you may want to create a list of outcomes that relate to the services you provide. If appropriate you can record financial outcomes, as well as using the Outcomes notes field to describe the qualitative difference your organisation made to the client's life.

To make AIMS more closely match how your organisation works you are able to create new fields, change the lists of client profiles, create your own subjects, work done types and outcomes.

AIMS Core and AIMS Extra

AIMS is available in two versions, AIMS Core, AIMS Extra. AIMS Core contains all the core elements shared by the other versions and is a fully operative database in its own right. AIMS Extra contains additional case management features, providing increased functionality. The various features and functions are detailed in the table below.

AIMS CORE and EXTRA:

Feature / function	Core	Extra
Search	✓	✓
Client Details and Person Profile	✓	✓
Subject and Work Details	✓	✓
QDE	✓	✓
Outcome measures	✓	✓
Reports	✓	✓
Client Mailmerge	✓	✓
Conflict of Interest Search		✓
Diary		✓
Action Manager		✓
Global Address Book		✓
Linked Clients		✓
Third Parties		✓
Conversion Tables		✓
Mailmerge Suite		✓
Batch Add		✓
Service Profiler		✓

Agencies can upgrade from AIMS Core to AIMS Extra at any time. All data will be available within the newly upgraded system. AIMS Free Core users are limited to 5 users at any one time.

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What sort of agency are you?

Who do you work with & how do you deliver your service?

In deciding how to use and configure AIMS you will need to consider how you deliver your service. Do you work primarily on a one to one basis (i.e. a caseworker working with a single client about one or more problems) or do you provide services to several clients all at the same time (i.e. one person running a group counselling session, or toddler's club). You will see below that AIMS can be designed to capture information about both these different types of services, or both types together if you provide a mix within your organisation.

To help you get started we have created a number of Subject classifications that might describe the work you do. These lists can all be amended, either by adding your own additional codes or by altering our descriptions to better match your preferred terms. If none of them quite match your needs, you also have the option to "Create your own" classification. See the User Help Guide for more information.

All kinds of organisations can use AIMS. We have identified a few examples below and suggested which classification schemes might be most suitable. All classification schemes can be viewed as Word documents and can be found in a folder under the AIMS directory once the software is loaded.

Advice & Information to the public;

Your agency will tend to work with individuals who have one or more problems (Subjects) that you are helping them deal with. This may be via face to face support, email or a telephone helpline.

See either the Advice Detailed or Advice Summary classifications for a long/short description of typical advice issues.

See YouthStats for a classification that includes many counselling topics.

See DIAL UK classification where client issues are more health and disability focussed.

The default settings in AIMS will support your style of working. See later sections of this guide to help you make decisions regarding configuration, i.e. fields to switch on or off, using auto generated reference numbers etc.

Development Advice to organisations;

Your agency's work focuses on helping other organisations, i.e. working with them to develop policies, help build capacity etc by training and consultancy support.

See the Organisational Development classification.

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In Work Done; See the “Which Classification scheme” section below for ideas on how to amend the Work Done, How Contacted and Where Contacted code lists.

In Coded Outcomes: View the Coded Outcomes in Code Lists and amend as appropriate. You can have multiple outcomes per subject.

Also see below for discussion on capturing work where a number of people attend the same activity at the same time, e.g. training session or club event.

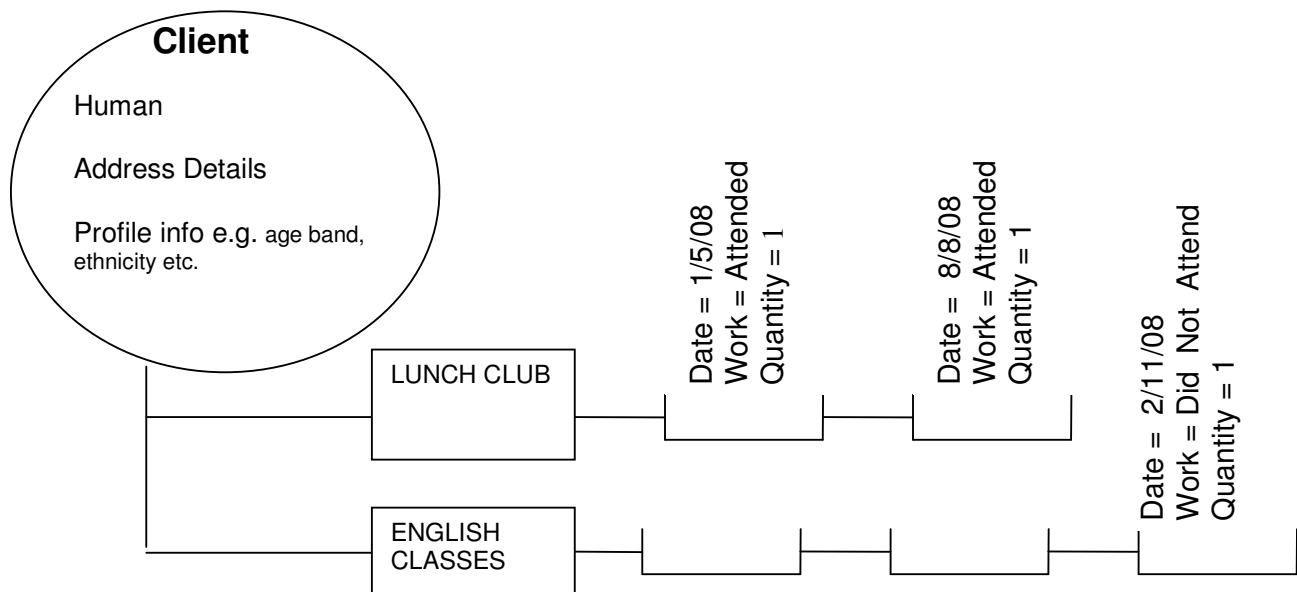
Subject Classifications are available to view in Word format by navigating to the Classification sub directory under AIMS once the software has been installed.

How to record activities involving groups of people

Where agencies provide a service to a number of users all at the same time e.g. a Lunch Club or Language Class or Policy Seminar you have two choices relating to how to capture this information. These are shown in the two Figs B and C below.

In Fig B, each individual who attends the group activity has their personal attendance at that session captured by having the activity named in the Subject classification and that subject is then associated with their client record. Each time they attend the Lunch Club a new work done is created (the contact information in work done tells you the date the activity took place). This enables us to say which Lunch Clubs that particular person attended, and we could also report on how many people in total attended the Lunch Club on any particular occasion.

Fig B) Group Work captured using Subject & individual Client details



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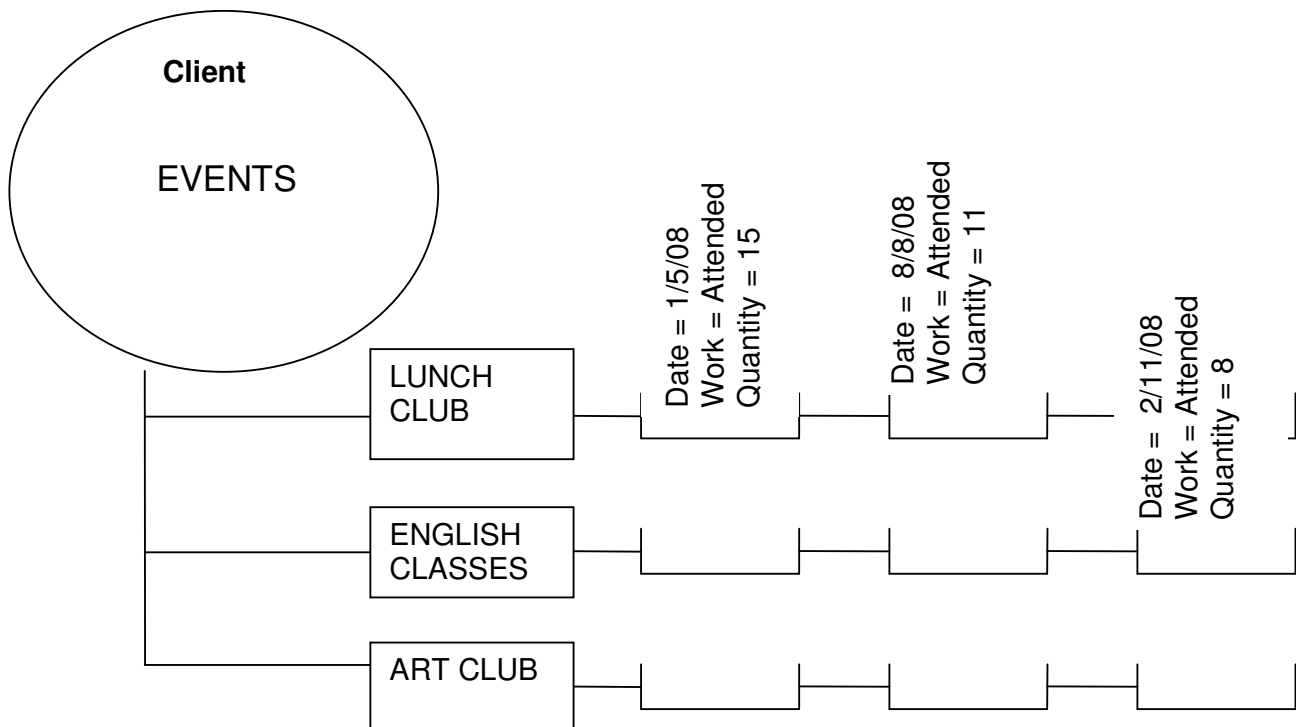
Things to do before you get started

This way of capturing group work activities requires you to add information to each client record for everyone attending. By doing this you gain a lot of information about the profile demographics of who is attending, e.g. 50% of the club users are Asian, 60 % have a disability etc. For some activities such as classes you may have outcomes, it would therefore be possible to say for instance who had completed a course.

Another benefit of this detailed data collection is the ability to record when a client did not attend a particular session. This can be done by using the Attended / Did not attend options in the work done contacts screen. We can see that the client in Fig B) did not attend the English Class on the 2/11/08 but did attend the 2 Lunch Clubs.

An alternative way to capture group work is shown in Fig C. Here a Client has been created called EVENTS. The EVENTS "client" has the various clubs or class activities captured as subjects. Each work done attached to the subject records when the activity took place and the number of people who attended. This method of data collection is much quicker and allows you to record totals of attendees but you do not know who the individuals are and therefore cannot say anything about individual outcomes or provide demographic profile information.

Fig C) Group Work captured by creating the activity as a Client as well as a Subject



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Decisions Affecting Configuration Choices

Classification scheme structure

The structure (or shape) of the classification scheme is very important and will help you describe your work, grouping similar types of work together. You will then find it much easier to report on that work later. Using the Services Provided classification scheme as an example, its structure is AAA.A01 or letter letter letter followed by letter and number.

The first three letters describe the 1st tier of complexity (or most general), the next letter describes a second tier and finally the numbers describe sub sets of the second tier.

For example VOL describes all the volunteering services you are providing, VOL.D describes the volunteer activity of visiting someone and VOL.D01 then breaks these visiting activities into types of visiting. This system would then allow you to report on all your VOL work without needing to see the detail, or all the VOL work broken down to the 2nd tier or finally all your work in detail showing every type of visiting service you provide.

Which Classification scheme?

AIMS contains a number of different classification schemes which can be used to classify the subjects (or client problems) brought to the agency. The system comes with two Advice focused schemes, Advice Detailed (circa 300 topics) Advice General (circa 45 topics) as well as a number of alternative classification schemes e.g. Youth Access, Dial UK, and the old Nacab Social Policy Codes (no longer being used by Citizen's Advice). You can also build your own scheme either from scratch or by adapting one of the pre-existing ones.

You will need to decide on your preferred Subject classification before you start inputting data, as once you enter a record the classification scheme becomes fixed. You cannot then change it for a completely different Subject classification but you are able to add, amend or remove subjects from your chosen scheme.

Although you have a choice of Subject classifications, the code lists associated with all the other fields e.g. Work Done, Age Bands or Outcomes for instance are pre-set. You are likely to want to amend these code lists to match your service users and service delivery (i.e. reflect the age groups you work with or the ethnic mix in your catchment area) to do so you will need to look at the Configuration section of the User Guide for more details.

For instance, agencies offering services such as training courses or running clubs may want to amend the How Contacted code lists and the Work Done code lists to include options such as "Attended" and "Did not attend" (in How Contacted) to help them

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measure where clients participated/did not participate in an event. In the Work Done list they might prefer to use the term "Session" rather than "Interview" to describe their work, and so could delete Interview from the list. In this example we would have a record as follows:

Subject	"English Class"
How Contacted	"Attended "
Where Contacted	"Millennium Centre"
Date	"21/11/08"
Work	"Session"

In the above example because the Subject is an English class we know the session was a training session. If training was run from a number of different sites then you would list each site under the Where Contacted code list. If the subject had been Lunch Club we would know the session referred to someone visiting the centre for that activity.

You can also delete other work types such as "Representation" if you do not undertake this type of work. This will make the code lists easier to use and more applicable to the work of your organisation.

The various Subject Classification schemes are available in Word format on the AIMS CD for viewing.

Who will be inputting the data, who will be viewing the data?

You will need to consider how your organisation currently inputs data when setting up the "Manage Users" function. You will need to identify what permissions level is required for each AIMS user. Permissions are the clearance levels that can be ascribed to each person using AIMS, which allows them to perform only designated functions, such as adding and editing records, deleting records or simply viewing data only. See the Manage Users section of the Users guide for further details.

In addition to setting permissions you should also be aware of the "hide" function, which allows you to remove certain features or functions from the sight and therefore use of certain users. Switching certain functions off for particular users helps provide them with a clearer screen where they only have access to the parts of the system they need to work with. See the Configuration section of the User Guide for more details.

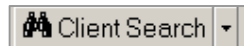
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Screen and Function Issues

You will find it useful to have the AIMS Guided Tour demo up and running so that you can follow the discussions by moving to the various screens or functions being talked about. You can do this by locating the feature/function on the demonstration system that matches the icon along side each section.

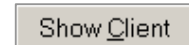
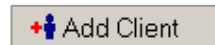
Search Screen



The Client Name/Organisation field in the search screen is fixed and cannot be changed via configuration. All the others (including what to display in the Show field) can be altered from within Configuration.

You should consider your preferred means of finding existing clients in the database, and what details you will use to retrieve them. The Welcome Screen contains a reference number search/find facility that presumes you have those details to hand. The Search Screen allows you to find a client using their client details and profile information, e.g. part of an address or national insurance number.

Client Details



Will you want to find clients once they have been added to the database and add more work detail to their existing subject/s or client record? If so, what will you search on?

On the Welcome Screen there are two Find fields, one for Client data and one for Subject data. The Client Find field will search for a Client Reference or a system generated Client ID Number. The Subject Find field will look for a Subject Reference, the Subject ID Number.

The ID numbers are unique to each client or subject record and are generated by AIMS and cannot be altered, re-used or re-assigned to another client or subject. The other references are input by you each time you create a new client or subject and can be a combination of letters, numbers and slashes.

It is possible to configure "default settings" for all reference fields which can be based on a range of AIMS system data, e.g. Client initials, AIMS ID numbers, User ID. In this way your agency can automate the creation of the reference field.

If you cannot find the Client or Subject from the Welcome Screen you will have to go via the Search Screen. What other information will you use to find the client?

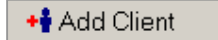
Consider how your current referencing system will work in relation to how AIMS holds the data. How many reference numbers do you want or need? Do you want your paper based case files to share the Subject Reference number or have a different one? When are references generated in your agency and who by? Will automated references be

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possible for all your services, or are some pieces of information not known until after the case has been entered onto the system?

Client Profile Information

 Add Client

Client profile information is entered in the Client Detail screen. You can configure all the profile fields, switching them off, or creating new ones. If you want to create new fields and collect further information at the Client Profile level remember that these details will remain with the client until you change them.

NI Number WK 05 58 86 D	Date of Birth 23/02/1957	Impairment B	No
Age Band E	35-44	Gender B	Male
Ethnicity A	White	Employment Status A	Employed Full-Time
Housing Status		Personal Status	

Each subject you subsequently attach to that particular client will use these details for reporting purposes. Try to capture details that will not change over time, and are not specific to a particular subject or piece of work. Obviously this is difficult, as some statuses do change over time (e.g. housing tenure, disability status) and if the client returns at some point in the future with a new problem then you may wish to update the previously entered profile details. This will have an impact on what the database reports, as all the subjects attached to that client will now be linked to the updated profiles. AIMS does not keep a record of the profile status's as they were at the time of the client contact.

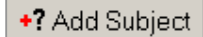
For instance, if the client seeking help with a benefit problem had described themselves as disabled when they first used the agency but returned a year later with a housing problem and this time they say they are not disabled, then updating their client profile will affect the reporting on the earlier subject. The database will report two subjects presented by a client without a disability, not one subject with a disability and one without.

Within the Client Detail screen it is also possible to change the display order of the Person Profile fields. It is important to ensure the display order is correct, as only the first two lines (between four and six person profile fields depending on length of field selected) as seen in the Client Detail screen will appear on the Quick Data Entry screen (QDE). When selecting which fields to display, consider how you might use the QDE screen differently from the Full Client Details screen. QDE might be used more for your telephone advice line where fewer details are captured. If so what client profile information would you get from an advice line call that is different from a face to face interview?

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Subject Details

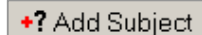
 +? Add Subject



Do you want to collect any further information at this level? Up to six user defined fields can be added to the Subject Details screen. Remember that attached to each subject you can have multiple work done records. The most appropriate type of information to attach to the subject are things that tend to happen once in the life of that subject, i.e. the subject is referred in only once, is opened once. If something happens through-out the life of a subject then the Work Done screen is likely to be the place to capture those details.

The Subject screen has a small notes field included. This is configurable and can be switched off if not wanted. The notes field allows you to include a brief description of the subject matter. The description will appear on the Subject Header in the Client History Screen once you have closed the subject details form. The note will also appear on the case in full report.


QDE

 +? Add Subject

The configuration choices made in the Client Details screen and Subject Detail screen will affect the QDE screen. In the Client half of the QDE only the first two lines (between four and six person profile fields depending on length of fields selected) will appear in the Client Details screen as available for data entry. In the Subject half of the QDE between two and four of the User Defined fields will be visible. Coded choice fields take up half a screen width and date fields take up one quarter. It therefore depends which fields (if any) you have added to the Subject form.

The Subject Note field does not appear on the QDE screen and can only be accessed from the main Subject Screen.

Batch Add

 Post Batch

Only available in EXTRA.

Batch Add allows the easy input of data from all areas of the AIMS database in one single form. Telephone helplines may find this a particularly useful feature for speed of data entry.

In order to make the most effective use of the Add Batch form you should use the configuration wizard to set up the form using the most appropriate fields for your working practices and use of AIMS. Decide what is required on the form and switch on or turn off any fields that may not be used.

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Work Done



Contact information vs. Work Done information

The Work Done screen allows you to capture two different pieces of information within the one screen. They are:

- i) information concerning any contacts with the client and
- ii) information about work undertaken on the case.

The two pieces of information allow you to say two very different things.

The contact details (how and where you made contact) will enable you to say how many times over a given period you had contact with your clients. You may want to change the current list of types of contact so that it only records physical contacts with the client, i.e. remove letters, emails and telephone calls from the possible types of contact.

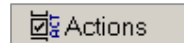
Another configuration option might be to switch off both the How and Where contacted fields but leave the overall No Contact/New Contact choice available. This would give you a count of client contacts without providing the detail of where and how they took place.

If you want to be able to identify the number of clients, the number of contacts with those clients, and the work you did for those clients then you will need to capture contact information.

If you do not need to differentiate between the number of clients and the number of contacts (e.g. I know we had 20 clients last month, but I don't want to say how many times we saw them) then you can switch off the contact information data collection altogether, via the Configuration Wizard.

Work Done allows you to capture details of both the action taken (e.g. letter) the quantity of those actions (3 letters) and the time taken. You are not required to capture time information and this can be switched off if desired. Also it is possible to specify a number of actions and quantities, and then provide an overall summary of the time spent on all the activities, rather than break them down individually.

Action Manager



Only available in EXTRA.

AIMS comes loaded with a small number of example templates that you can use to firstly copy and then amend to meet your particular requirements. Only persons with Administrator level permissions can create or amend the Action Manager templates.

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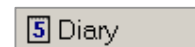
However once an Action Manager template list has been “called down” then every worker is able to add their own actions. This will not affect the original template which remains unchanged and available for use in the future.

Action Manager templates can have documents attached to them to assist in the automation of certain tasks e.g. sending out client letters. You may find it useful to develop your use of both the Action Manager and mailmerge facility over time, by reviewing how different workers have adapted the templates and incorporated them into their working practices.

It is also possible to assign an Action Manager template to a particular Subject or group of Subjects so that each time that Subject is opened the Action Manager is activated automatically.

The Action Manager feature can either be switched off altogether so it is not available, or be hidden from individual user’s views, via the configuration wizard.

Diary



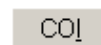
Only available in EXTRA.

It is not possible to link the Diary with other software such as Outlook or other handheld personal organiser systems. Where other systems already exist in your office you need to consider the potential impact of running two systems in parallel. AIMS does have the advantage of having all the client details already available when booking rooms or appointments, and also provides an overview of all workers diary appointments.

Within configuration you can specify the existence of User Groups, and ascribe these groups with different members, e.g. Housing Team, Management Team etc. By inviting the Group to a meeting you will invite all members at once.

The Diary feature can either be switched off altogether so it is not available, or be hidden from individual user’s views, via the configuration wizard.

Conflict of Interest



Only available in EXTRA.

The Conflict of Interest search screen allows you to search for clients and/or organisations that in some way may be associated with the client who is presenting a new problem. Agencies may well have an existing conflict of interest policy and they should identify how this policy can be incorporated into the AIMS search facility.

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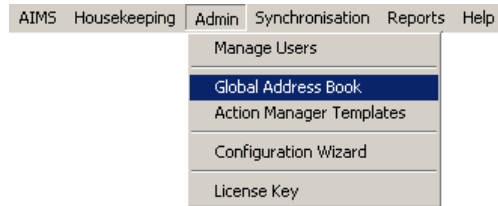
COI can be switched off if not wanted, in which case it will not be available from the welcome screen but will still be available from the Reports drop down menu. Conflict of Interest can also be configured to be hidden for individual AIMS users.

Global Address Book (GAB)

The GAB is a database within the database, providing you with ability to hold up to 250 contact details for organisations or other individuals you work with on a regular basis.

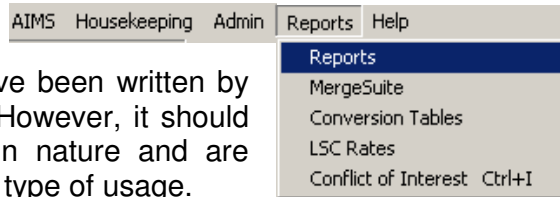
GAB details are available to each Subject and through them to the merge documents facility making it easy to write to your frequently used addresses.

In addition GAB provides you with a way to keep a list of your Referral Agencies, which can be attached to the subject record via the work done referred to field.



Reports

AIMS includes a number of reports that have been written by Lasa and are ready and available for use. However, it should be noted that these reports are general in nature and are based on a guesstimate of configuration and type of usage.



Any changes you make to the database during configuration could have an effect on how these reports run. By switching off a field for instance that has been included in a report layout or adding a new field which has a specific meaning for your agencies data collection.

It is important to keep notes of the changes you make to the system and in conjunction with the Report Layout Wizard and Using Reports sections of the full help guide, check to see that the system reports incorporate any configuration changes where necessary.

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Further help and training

If you require further assistance there are a number of options;

Support:

We offer an annually renewable support service that gives access to our helpline. See our web site for the cost and type of support offered.

Training:

We run regular training sessions, training only 6 people at a time, covering 3 areas, Introduction level, Administration and Report writing. See our web site for next available dates or call to go on our waiting list.

We also offer in-house training.

Consultancy:

We offer a consultancy service to help you with your configuration choices, or assistance designing reports.