

AIMS VERSION 3.6.1.2

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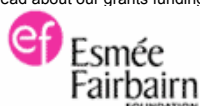


# aims full help guide

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## CONTENTS PAGE

Welcome to AIMS.....	3
Adding a Client.....	4
Editing, Deleting and Merging Clients .....	11
Adding a Subject in the Quick Data Entry screen .....	13
Adding Batches Using the Add Batch Function.....	17
Work Done .....	24
Formatting Notes.....	29
Linking Documents.....	31
Outcomes and Closing a Case.....	32
Using The Quick Data Entry Screen .....	34
Searching .....	36
Conflict of Interest .....	39
The Diary.....	44
Adding, Editing, Deleting and Viewing Diary Appointments .....	46
Action Manager .....	52
Action Manager Templates .....	57
Services Used Monitor .....	64
Global Address Book.....	66
Linked Third Parties .....	69
Linked Clients.....	73
Grouping of Subjects.....	76
Setting up Mail Merges.....	79
Running Previously Created Reports.....	87
Adding, Editing, Copying and Deleting Reports .....	93
Using The Report Layout Wizard .....	105
Using The Merge Suite.....	130
Mail Merge to Email.....	139
Conversion Tables .....	141
Managing Users .....	145
Configuration .....	150
Backing Up, Restoring Data and Compacting – AIMS Access Version only.....	171
Backing Up, Restoring Data – AIMS Firebird .....	172
Backing Up, Restoring Data – AIMS MS SQL.....	173

## Welcome to AIMS

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Once you have successfully installed AIMS and double clicked on the AIMS Icon to load the software, you will be prompted to login. The default login for a fresh AIMS installation is:

**User ID: admin**

**Password: password**

Neither the user ID nor password is case sensitive.

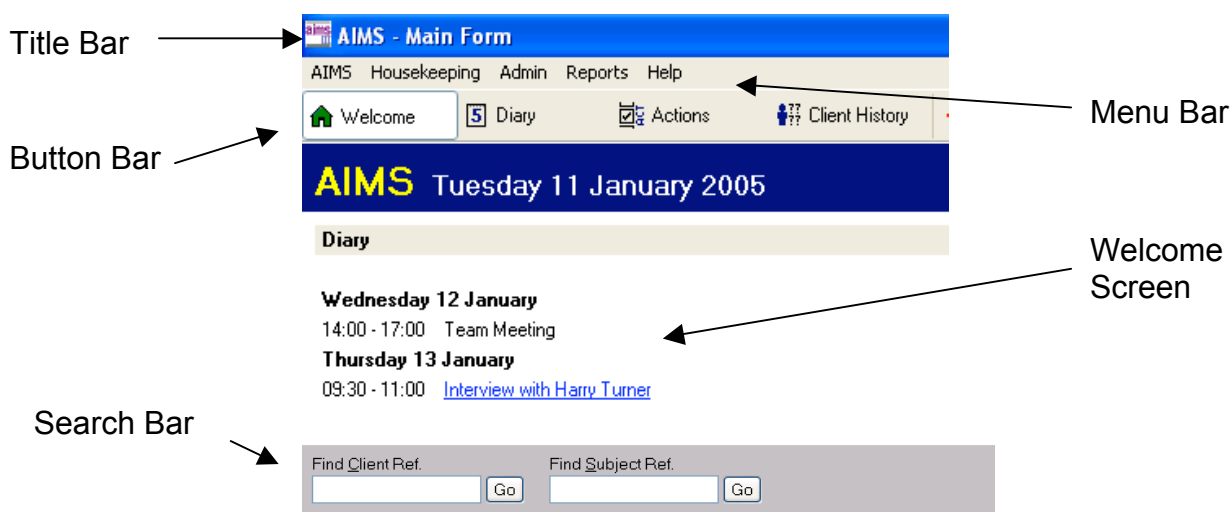
When you login for the first time, you will be asked to provide a 12 character Licence Key to activate AIMS. This switches AIMS on and allows you to start configuration.

Please read the Pre-configuration Guide carefully as certain choices cannot be changed once any data is entered. **Do not** add any data until you have read the Pre-configuration Guide.

Full details of how to enter the subscription key are in the Installation Guide.

### The Welcome Screen

When you login to AIMS for the first time you will see the welcome screen. The AIMS main screen consists of five main elements as shown in the diagram below:



**Menu Bar:** Where the “behind the scenes” functions (e.g. setting up system users, configuration, etc) can be accessed.

**Button Bar:** By clicking on any of the Button Bar buttons you can move to that feature.

**Welcome Screen:** on the left hand side you can see the information relating to the next 7 days Diary appointments, and opposite are the Action Manager “to do” list activities.

**Search Bar:** At the bottom of the Welcome Screen are two blank fields with Go buttons next to them. These enable you to find an existing client or subject record already in the system where you know the reference number. This is a very specific way of finding a record.

## Adding a Client

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### Where should I add a Client's Details?

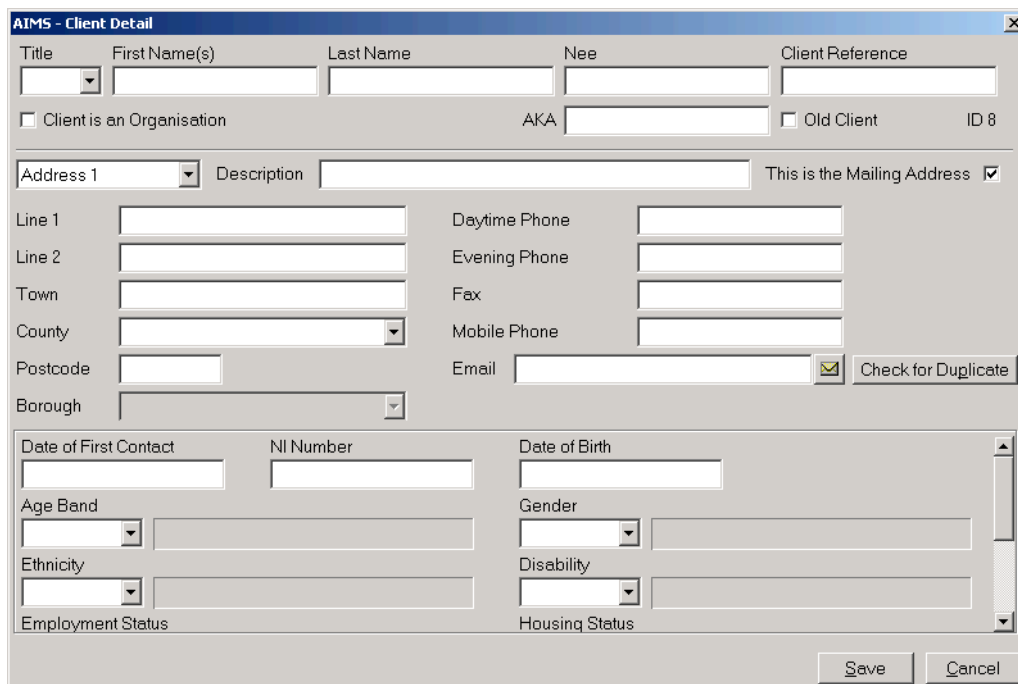
There are two areas within AIMS where you can add a client's contact and profile details. These are the 'AIMS – Client Detail' screen and the 'Quick Data Entry' screen.

The 'Client Detail' screen gives full access to all the contact and profile details. This is the screen described below.

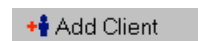
The 'Quick Data Entry' screen combines the ability to add new Client and Subject details as well as offering access to Work Done and Outcomes. This screen is described in the Help Guide section, '[Using the Quick Data Entry](#)' screen.

### The Client Detail Screen

The Client Detail screen is where all data relating to the contact or profile details of an individual or organisation are added, amended, merged or deleted.



1. Clicking on the 'Add Client' button on the top navigation



bar opens

The screen is divided into four parts:

- The top area contains fields for the Name, Reference, whether the Client is an Organisation and Old Client.
- The middle area contains fields relating to the Client Address including the Description and Mailing details. The 'Duplicate Search' is also started here.

- The lower scrollable area contains fields that can be used for Client Profiling and any user defined fields that have been configured by your agency.
- At the bottom of the screen there are the Save and Cancel buttons and the Notes Icon. Once a client has been saved there will also be Print, Delete, and Merge buttons available

## How to Add a Client

1. Open the Client Details window by clicking the Add Client button on the top button bar.
2. Before entering any information decide whether the client to be added is an individual or an Organisation.

### Note

If the field 'Client is an Organisation' is ticked a window will open asking you whether you want to 'Change Client into an Organisation?' If you answer 'OK' all information already entered that captures the name of the client will be lost and fields relating to Organisations will appear (see screenshot below).

The screenshot shows the 'AIMS - Client Detail' window. At the top, there are fields for 'Organisation', 'Type of Organisation' (a dropdown), and 'Client Reference'. Below these is a checked checkbox for 'Client is an Organisation', a 'Contacts' field with a dropdown and an ellipsis button, and an unchecked checkbox for 'Old Client' with 'ID 11' next to it. The main section contains address fields: 'Address 1' (dropdown), 'Description', and 'This is the Mailing Address' (checked). Below are rows for 'Line 1', 'Line 2', 'Town', 'County' (dropdown), and 'Postcode'. To the right are phone number fields: 'Daytime Phone', 'Evening Phone', 'Fax', and 'Mobile Phone'. There is an 'Email' field with an envelope icon and a 'Check for Duplicate' button. At the bottom, there are 'Date of First Contact', 'Main Client Group' (dropdown), 'Subject Area' (dropdown), and 'Catchment Area' (dropdown). 'Save' and 'Cancel' buttons are at the bottom right.

### If the client is an Organisation

3. Type in the name of the Organisation.

AIMS can be configured to default to individual or organisational clients. See the Configuration section for further details.

4. Enter the 'Type of Organisation'.

This field is used to codify which types or organisations are using your services. Typical values might be: Voluntary, Commercial, Public. This field should be configured by your agency to suit your specific needs.

5. Enter the name of any Contacts at that organisation. This is done by clicking the button which brings up the contacts window where new contacts can be added.



Title	First Name(s)	Last Name	Daytime Phone	Evening Phone	Mob

A Contact at an organisation is the person at that organisation who has contacted you about a particular subject. Once you have entered their details here you will be able to select them when adding subjects.

6. Each Organisation Contact can have their own contact details including separate telephone and email addresses.

### Roles and Organisation Contacts

7. Each Organisation Contact can be ascribed a role, by ticking one or more of the roles listed. Alternatively you can leave the contact with no roles. Roles can be defined via configuration of the Code List called “Org Contact role”.

You can use Roles to identify and then select groups of specific contacts across all of your Organisational clients, e.g. write to all those with the role “Training Officer”, or write to All Chief Executive’s of organisations that had subjects opened this year.

## If the client is an Individual

8. Type in the name(s) of the client.

## Client References

9. The Client Reference field can have a range of configuration choices associated with it. It is possible to generate automatic reference numbering “Field Defaults”, to require the Client Reference field to be unique and/or to require data to be entered. For further details see the Configuration section.

## Adding Address details

Address 1	Description	Business	This is the Mailing Address <input checked="" type="checkbox"/>
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- It is possible to add up to three address details for each client or organisation.
  - The different addresses are selected by using the Address field. Each address should be identified by a different description.
  - The ‘This is the Mailing Address’ tick box allows the address to be used for mail merges when it is ticked. ‘Address 1’ is the default mailing address. If no address is designated as the mailing address, it will not be possible to do mail merges automatically. It is **not** possible to identify more than one address as a mailing address.
10. Choose whether you want to enter Address 1, Address 2 or, Address 3.
11. Enter an appropriate description.
12. Decide if this is a mailing address.
13. Enter the Address, Postcode, phone numbers etc as appropriate.

## London Addresses

### Note

The London Borough field will need to be switched on in configuration if you wish to use it. For details on how to do this, please see the section [Configuration](#).

Line 1	88-94 Wentworth Street
Line 2	
Town	
County	London
Postcode	E1 7SA
Borough	Tower Hamlets

## **Duplicate Search**

The Duplicate Search facility can be used while entering the name and address details of the client to see if an earlier record for that client exists in AIMS. This search is not the same as the 'Client Search' which is more flexible and allows you to go and examine the identified client's details. The Duplicate Search only identifies possible duplicates; it does not allow you to move to their Client History Screen.

The fields that the Duplicate Search uses to compare records are: All the Name fields, Address lines 1 and 2, Town, and Post Code.

The fields used in the Duplicate Search process slightly differently from how they are used in a conventional Client Search in the Search screen.

### **Name Fields**

All the name fields, First Name, Last Name, Organisation Name are examined in the same way. When you run a Duplicate Search, the search uses the contents of each name field as a 'starts with' search of the records in the database. The Organisation Name field is only searched in the duplicate search when the 'Client is an Organisation' tick box has been ticked.

For example:

If you entered 'T' in the First Name field and 'Roberts' in the Last Name field, the Duplicate Search would identify 'T. Roberts', 'Tony Roberts', 'Timothy Robertson' and such like who already existed in the database. If you have also entered some address details then the system would only show names who matched both the name and supplied address details.

### **Address Lines 1 and 2**

When you run a Duplicate Search based on the address lines the search ignores any numbers or road types (including abbreviations).

For example:

If Line 1 of the address is entered as '30 Hillside Rd.' then the Duplicate Search uses only the 'Hillside' element to identify any other records that had 'Hillside' as part of Line 1 of their address: '15 Hillside Road', 'The Arches, Hillside Rd.', '23 Hillside Avenue', etc. These addresses would only be offered if the name or postcode also matched the requested Duplicate Search.

### **Post Code**

The Post Code search is similar to the Name search. When you run a Duplicate Search, the search uses the contents of the Post Code field as a 'starts with' search of the records in the database.

For example:

If the Post Code is entered as 'L18' then a Duplicate Search would identify 'L18', 'L18 2ED', 'L18 3EJ', etc.

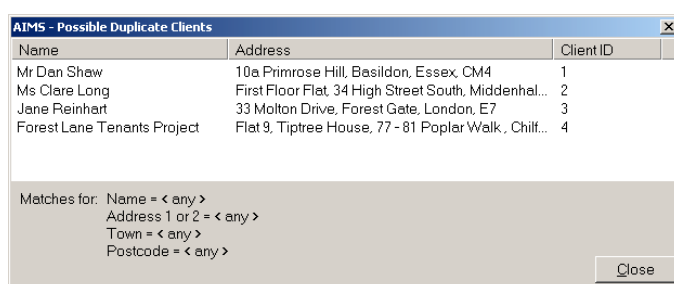
## Running a Duplicate search

Clicking the 'Duplicate Search' button starts a search using the contents of the Name, Address Line 1 & 2, and Post Code fields. The more details that are entered, the more restricted will be the search results.

1. Click the 'Duplicate Search' button. This will run the search and identify possible duplicate clients.



2. Use the 'AIMS – Possible Duplicate Clients' window to decide if the client you are adding is a duplicate. If so, note down their Client ID so that you can examine their details later.



Name	Address	Client ID
Mr Dan Shaw	10a Primrose Hill, Basildon, Essex, CM4	1
Ms Clare Long	First Floor Flat, 34 High Street South, Middenhal...	2
Jane Reinhart	33 Molton Drive, Forest Gate, London, E7	3
Forest Lane Tenants Project	Flat 9, Tiptree House, 77 - 81 Poplar Walk, Chilf...	4

Matches for: Name = < any >  
Address 1 or 2 = < any >  
Town = < any >  
Postcode = < any >

Close

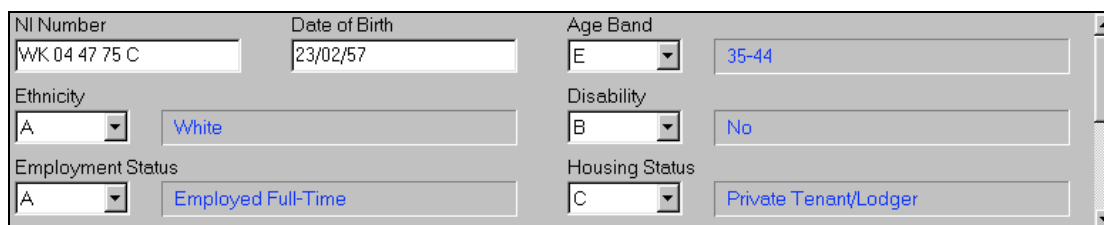
3. Click the 'Close' button. This will return you to the 'Client detail' window.

## Client Profile & User Defined Fields

Client Profile and User Defined fields are available both when the client is an individual and when the client is an organisation.

### Client is an individual

In the bottom third of the client details screen you are able to capture profile information about the client e.g. their ethnicity, age band, employment status etc. These fields can be configured by your agency to suit your specific needs.



NI Number Wk 04 47 75 C	Date of Birth 23/02/57	Age Band E	35-44
Ethnicity A	White	Disability B	No
Employment Status A	Employed Full-Time	Housing Status C	Private Tenant/Lodger

Client Profile and User Defined fields where client is an individual

### Client is an organisation


In the bottom third of the client details screen you are able to capture profile information about the organisation e.g. main client group, subject area, and catchment area. These fields can be configured by your agency to suit your specific needs.

Date of First Contact	Main Client Group
15/07/2004	A <input type="button" value="Generalist"/>
Subject Area	Catchment Area
B <input type="button" value="Welfare Rights"/>	W <input type="button" value="OTHER"/>

Client Profile and User Defined fields where the client is an organisation

## Client Notes

At the bottom of the Client form you are able to add notes that relate to the client (i.e. are specific to the client, not to the subject or work areas of the system).

Click on the  symbol to open the notes field.

Hover over the notes field to see if the notes field is empty or see the first few lines of any note if one is present. Use the Print button to see the note in the Client in Full report.

## Editing, Deleting and Merging Clients

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To Edit, Merge or Delete the contact details of an individual or organisation that already exists in AIMS you must go to the Client Detail screen of the particular client.

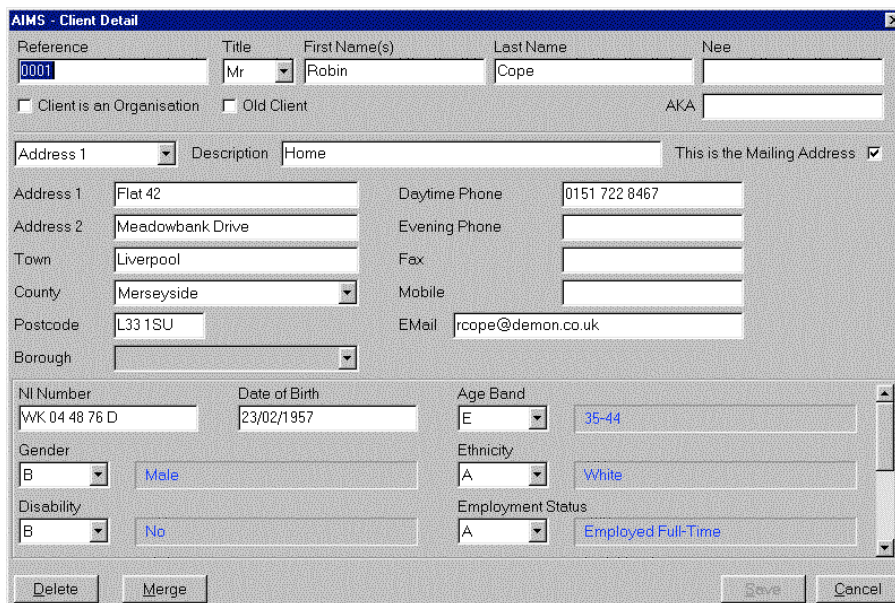
### How to open the Client Detail screen of an existing client

1. Use the Client Search screen to locate the required client record. Double-clicking that record will take you to that client's Client History screen.

2. On the Client History screen, click the Show Client button at the bottom right of the screen.



3. This will open the Client Detail screen.



The screenshot shows the 'AIMS - Client Detail' window. It contains various fields for client information:


- Reference: 0001
- Title: Mr
- First Name(s): Robin
- Last Name: Cope
- Client is an Organisation:
- Old Client:
- AKA: [empty]
- Address 1: Flat 42
- Description: Home
- This is the Mailing Address:
- Daytime Phone: 0151 722 8467
- Address 2: Meadowbank Drive
- Evening Phone: [empty]
- Town: Liverpool
- Fax: [empty]
- County: Merseyside
- Mobile: [empty]
- Postcode: L33 1SU
- E-Mail: rcope@demon.co.uk
- Borough: [empty]
- NI Number: WK 04 48 76 D
- Date of Birth: 23/02/1957
- Age Band: E (35-44)
- Gender: B (Male)
- Ethnicity: A (White)
- Disability: B (No)
- Employment Status: A (Employed Full-Time)

Buttons at the bottom: Delete, Merge, Save, Cancel.

### Editing a Client's details

1. Once you have opened the Client Detail screen, move to whichever field(s) you wish to update and edit/enter the new details.

2. When you have completed editing the client's details the Save button to make the changes permanent.



you must click

3. Clicking the Save button will return you to the Client History screen.

## Deleting a Client's details

Deleting clients is only possible if you have sufficient access rights.

1. Once you have opened the Client Detail screen, click the Delete button.



2. A dialogue box will open asking you 'Delete this client? Are you sure?' Only click OK if you are sure that you wish to remove the client from AIMS. ***It is not possible to recover a client's details once they have been removed.***

### Note:

A client can only be deleted if there are no subjects listed in the client's Client History Screen i.e. there are no subjects linked to the client.

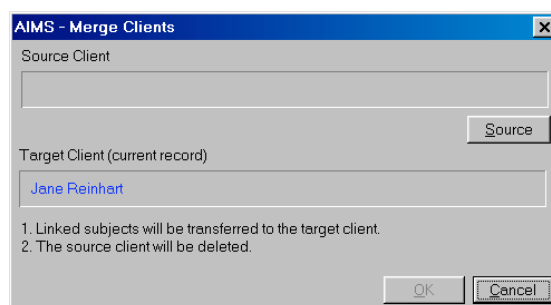
## Merging a Client's details

Merging clients is only possible if you have sufficient access rights.

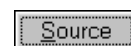
Where there are two client records for the same client it is possible to merge the two sets of records. Merging will move all the subjects from one client record (the 'source' or duplicate client record) to that of another client record (the 'target' or correct client record).

The client details attached to the source (duplicate) record will not be transferred to the target (correct) client's records i.e. the different address, phone number and profile information held in the source client will be deleted.

1. Go to the Client detail screen of the 'Target' client record (i.e. the client whose details you want to keep).
2. Click the Merge button.
3. A 'Merge Clients' dialogue box will open with the name of the target client displayed in the 'Source Client (current record)' field.



4. Click the 'Source' button. The 'Search for Client' window will open.
5. Use the search screen to select the client whose subject details you want to Merge with the target client. Double-clicking their record will enter their name in the 'Source Client' field.
6. Click 'OK' if you are certain that you wish to merge the source client's subjects with the target client's subjects. You will be warned that 'That this will result in the current client being deleted.' Again click 'OK' only if you are sure that you wish to proceed.



7. The target client's Client History screen will then be shown with the subjects from the duplicate source client displayed.

## Adding a Subject in the Quick Data Entry screen

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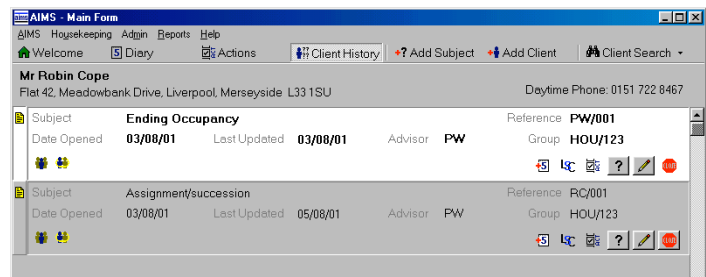
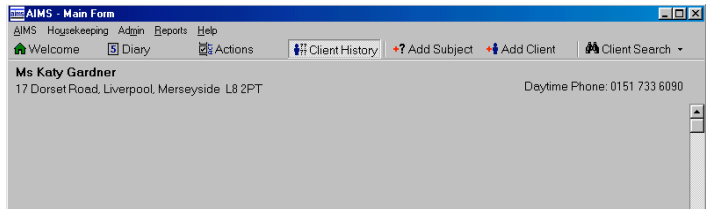
### What is a Subject?

Different agencies use different methods for collecting and describing the work they do. In AIMS the term Subject refers to the subject matter or issue raised by the client that caused them to come for advice or seek information

### The different types of Client

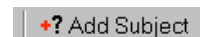
When you add a subject in AIMS you are required to add that subject to someone, a client. There are two main options as to who that client might be:

1. The client may be a new client whom you have just created who has no existing subjects attached. In this image of the Client History screen there are no subjects attached.
2. They may be a client who already exists in the database and who is returning with a new problem.




### Where to Add a Subject

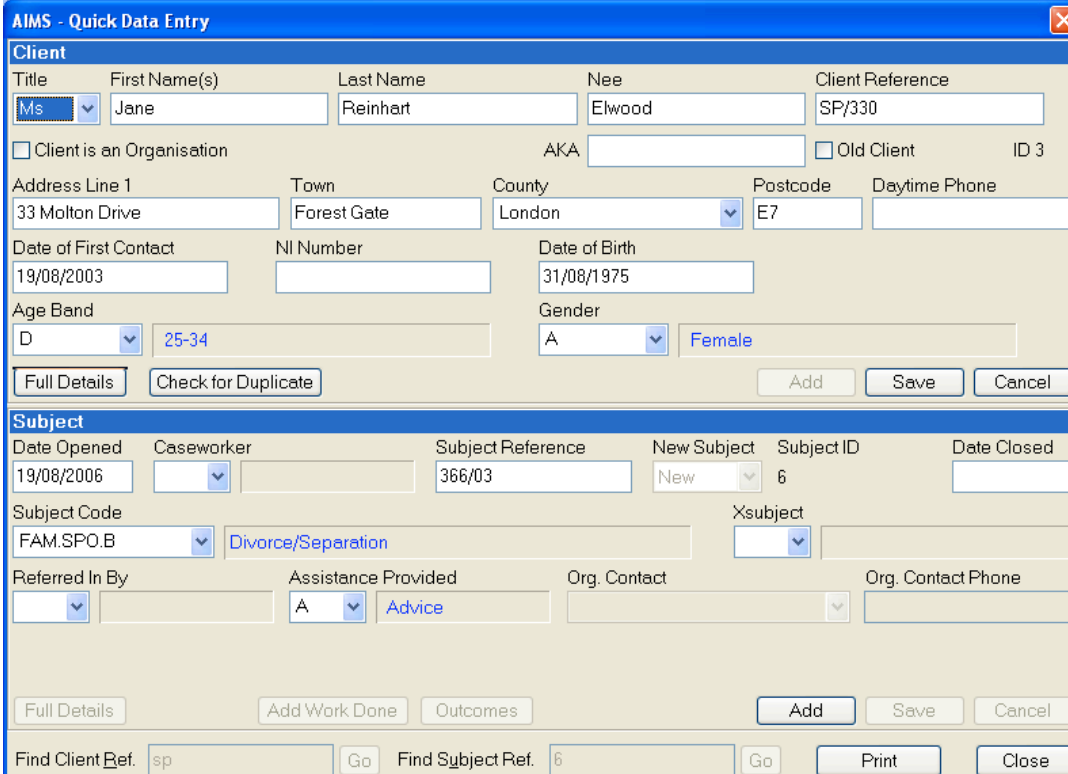
Subjects can be added to a client using the 'Add Subject' button on the menu bar at the top of the screen and also using the Add Batch feature. Please see the Add Batch section for further details.



## Adding a Subject

1. Click the Add Subject button or use the keystroke alternative 'Ctrl + Q'. This will open the Quick Data Entry (QDE) screen.

 Add Subject



The QDE screen is divided into two halves. The top half shows the client details of the 'active' client, the bottom half contains information related to a subject that the client has previously had entered onto AIMS. If the client is a new client then the 'Subject' sub-form will be empty.

## Selecting a Client before Adding a Subject

AIMS will assume that you wish to add a subject to the client you have currently selected – this client is known as the active client.

- If you know that the client you wish to add a subject to is already in the AIMS database, find the client and make them the active client.
- If the client is a new client use the **Add Client** button to create a new client with address and profile details.
- It is also possible to create a new client in the **Quick Data Entry** (QDE) screen, please see the section of the Help Guide [Using the Quick Data Entry Screen](#).

## The Client information

For information on how to use the 'Client' form to add or edit client information, please see the previous section of the Help Guide [Adding a Client](#).

## The Subject information

1. Check the information displayed in the 'Client' sub-form to ensure that you have the correct client displayed.
2. If there are no subject details currently displayed in the 'Subject' sub form then you are now ready to start inputting data. If there are subject details already displayed then click the 'Add' button that is on the Subject sub-form. This will clear any displayed subject information. The Subject sub-form should now look similar to the one below.

The screenshot shows a web form titled "Subject". It contains several input fields and buttons. The fields are: "Date Opened" (with a date picker showing 15/07/2004), "Caseworker" (a dropdown menu), "Subject Reference" (a text input field), "New Subject" (a dropdown menu showing "New"), "Subject ID" (a text input field with "24"), and "Date Closed" (a date picker). Below these are "Subject Code" (a dropdown menu), "Xsubject" (a dropdown menu), "Referred In By" (a dropdown menu), "Assistance Provided" (a dropdown menu), "Org. Contact" (a dropdown menu), and "Org. Contact Phone" (a text input field). At the bottom of the form are several buttons: "Full Details", "LSC Details", "Add Work Done", "Outcomes", "Add", "Save", and "Cancel".

### Note



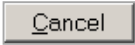
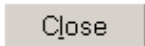
Your version of the Subject sub-form may look different as many of the options displayed above are configurable and may not be being used by your organisation.

3. The Date opened field will default to today's date. You can change this by typing over the information. A date can be typed in using short format, typing '15/7' or '15/07' or '15/7/9' will all give '15/07/2009' in the date field.
4. Select a Caseworker from the dropdown list in the field. The Caseworker will be displayed on the Subject Header in the Client History Screen (CHS).
5. Provide a reference number. It is possible to generate automatic reference numbering, see "Field Defaults" in the Configuration section. Remember this is the reference for the subject not the client. As clients remain in the database over long periods of time their reference number will not change but the subject reference will be different every time they present with a new problem. (See 7 below on using the Subject ID.)

### Note

AIMS does not require unique reference numbers, however see the Search support notes and design your reference number for ease of searching.

6. New/Repeat Subject field will only be active if the Old Client field is ticked i.e. if new client information has been entered and the 'Old Client' field has then been ticked.

7. The 'Subject ID' is a unique reference number given to each subject automatically by AIMS. Some agencies may choose to use the ID number to generate their Subject References or else rely on the Subject ID to identify the subject in their records. The ID number can be used to search for a particular subject from the Welcome or QDE screen.
8. The Subject Reference field can have a range of configuration choices associated with it. It is possible to generate automatic reference numbering "Field Defaults", to require the Subject Reference field to be unique and/or to require data to be entered. For further details see the Configuration section.
9. The Date Closed field is the date on which the Subject was closed.
10. Complete the other drop down combo select fields as required. Only the Subject Code Caseworker and Date Opened fields are mandatory.
11. If the client was an individual then the Organisation contact and phone details will be unavailable (greyed out). If they are available select the person who is at the organisation who is dealing with this case and enter their contact number.
12. If you wish to add additional information into fields not displayed in the Quick Data Entry Subject form you can press the "Full Details" button to move to the main Subject form. From here you are able to complete any additional fields, e.g. the Subject Note field, before Saving and returning to the Quick Data Entry form. 
13. When you have added all the required details, use the 'Save' button on the Subject sub-form to confirm the new information and add it to the database. 
14. Using the 'Cancel' button at this point will remove any changes that you have made and return you to an empty Subject sub-form. 
15. Having saved the new Subject details it is now possible to add Work Done details and Outcome details to the case. For details on how to do so, please see the sections of the Help Guide, Work Done, Outcomes and Closing Cases.
16. To leave the Quick Data Entry screen and return to the Client History screen, click the 'Close' button at the bottom right of the QDE screen. 

## Adding Batches Using the Add Batch Function

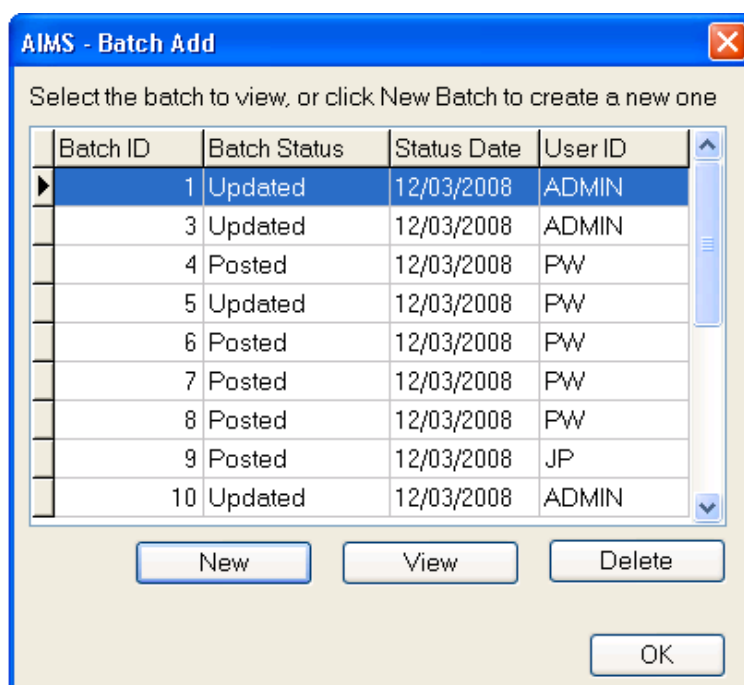
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This feature is only available in AIMS Extra.

The Add Batch feature allows you to input data rapidly from a single form. You have full configuration access to the form and can decide which AIMS fields appear on the form. Fields can be chosen from all the main areas of AIMS (Client, Subject, Work Done and Outcomes). The Add Batch form works by allowing the creation of AIMS data in a separate table before this data is posted into the main AIMS database. Batches can be created and saved without being posted and can then be updated as required. Once a batch has been posted the data within that batch will be recorded in the main AIMS database.

### The Batch Add Screen

1. To access the Add Batch form either click on the *AIMS* menu and select *Add Batch* or use the Ctrl + B keyboard shortcut. This will open the Batch Add screen showing all current batches and four columns of information about that batch.



The four columns are:


- Batch ID
  - Each batch that is created will get a unique Batch ID number. This is assigned by the system and cannot be changed. If you start to create a batch and subsequently abandon it, the Batch ID number that is assigned to that batch is lost forever and the next sequential number will be applied to the next batch.
- Batch Status
  - When you create a new batch and save it, the status of the batch will show as Created. If you then add new information to the batch, the status will be Updated. Once you have completed work on the batch and posted it into the main AIMS database, the status will be Posted. This is designed to allow you to easily see the status of all batches on the system.

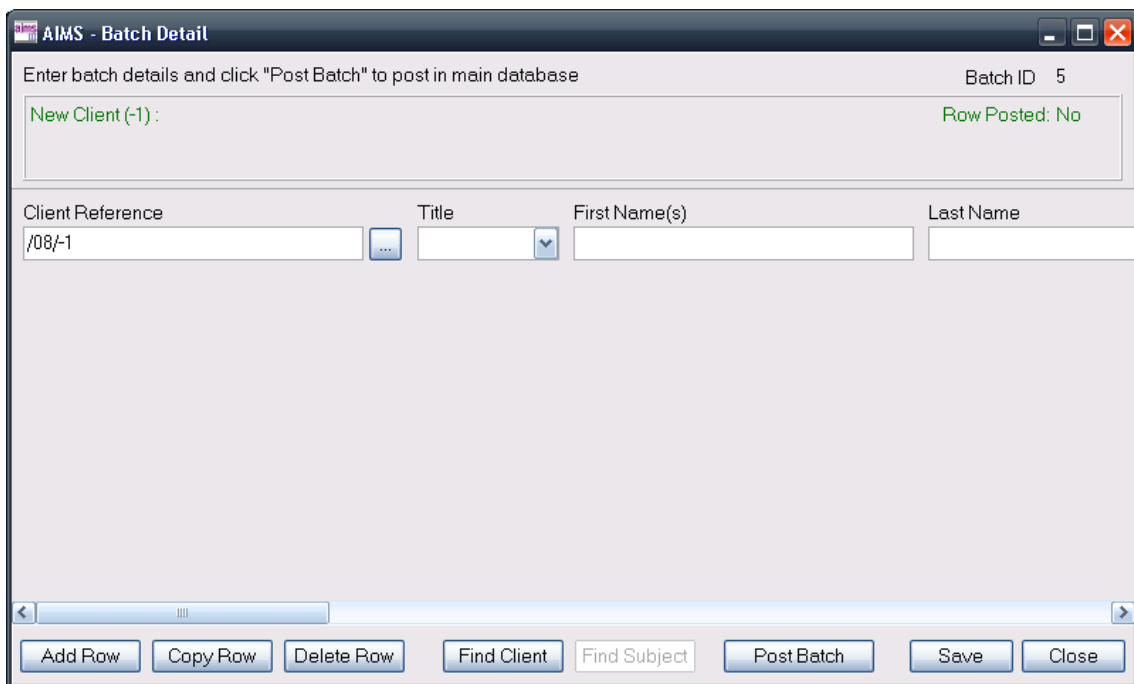
- Status Date
  - This is the date that the batch was either created, updated or posted into the database. As you update batches this date will change to reflect the last change.
- User ID
  - This is the ID of the AIMS user who created the batch and will remain for the life of the batch.

The Batch Add screen has four buttons:

- New
  - Click this to create a brand new batch of data
- View
  - Select a batch from the main list and click this button to open the batch ready for editing or posting
- Delete
  - Batches from the main list can be deleted if they are no longer required. To delete a batch, highlight it in the list and click delete. You will be asked if you would like to delete the batch and all of its records, click Yes. If the batch contains un-posted rows AIMS will ask if you want to delete this batch.
- OK
  - This will close the Batch Add screen and return you to the main AIMS screen

### Adding New Batches

1. If you would like to create a new batch, click the  button from the Batch Add screen. This will take you into the Add Batch Detail screen similar to the one below:



The screenshot shows a software window titled "AIMS - Batch Detail". At the top, it says "Enter batch details and click 'Post Batch' to post in main database" and "Batch ID 5". Below that is a text area containing "New Client (-1):" and "Row Posted: No". The main part of the window is a form with four columns: "Client Reference" (with the value "/08/-1" and a search icon), "Title" (with a dropdown arrow), "First Name(s)", and "Last Name". At the bottom of the window is a button bar with the following buttons: "Add Row", "Copy Row", "Delete Row", "Find Client", "Find Subject", "Post Batch", "Save", and "Close".

The form is split into three main areas, the batch information box (top), the actual form containing the fields that you have chosen when Add Batch was configured (middle) and the button bar (bottom).

Text in the batch information box will change as you move through the form and data is added. This part of the screen will tell you the status of individual rows within the batch, it will also tell you if the row has been posted or not (top right). Because a batch can contain both posted and un-posted rows of data, you will be able to work through the rows and see their status.

The paragraphs below explain the functions of the buttons on the Add Batch button bar:



Clicking on Add Row will insert a new empty row at the bottom of the form so that you can begin entering a new line of data.



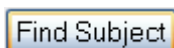
Copy Row will take the data from the selected row and copy it into a new row at the bottom of the form so that you can add more data to that line (e.g., add another subject to the same client or add additional work done to the same subject).



Clicking Delete Row will erase the currently highlighted row from the list. Any data held in this row will be deleted from the batch. However, if the deleted row has already been posted then the information has already been entered into the main AIMS database.



The Find Client button allows you to search the main database for an existing client. You can search for existing clients using the Client Reference, First Name and Last Name fields. This button will only be available when the cursor is in one of those fields. Finding clients and subjects is covered in more detail later.



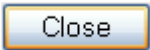
The Find Subject button works in a similar way to the Find Client button but will search the database for existing Subject References. This button will only be available when the cursor is in the Subject Reference field. Finding clients and subjects is covered in more detail later.



Once you have completed all the rows for this particular batch, you can post the batch to the main database. Clicking the Post Batch button will do this. If any compulsory fields have not been completed you will be prompted and taken to the field that needs to be completed. After completing or amending data in the fields, you can then click Post Batch again and the data within the batch will be posted into the main AIMS database. You could continue to update the batch and new rows can be added at any time. If you do not want to continue working with this batch you would click the Close button after you had posted the batch.



The Save button allows you to save a batch which you could come back to later. By doing this you can add rows of data to the batch without them going into the main database until you are certain that the data is correct before posting the batch. If you wanted to return to the batch without posting it at a later date, clicking the Save button will save any changes you have made and then you would be able to click the View button from the Batch Add screen to continue using this batch. No data has been added to the AIMS database if you click Save.






The Close button will close the currently opened batch. If you have not saved the rows within that batch you will be asked whether you would like to discard the changes. If you click yes, any changes made since you opened this batch will be lost. Click Cancel to return to the batch and click Save if this is not what you meant to do.

### Building Rows of Data in a Batch


The main data form in the Add Batch details screen will show only fields which have been selected using the Configuration Wizard. As the Add Batch form has been designed to speed up adding data, we recommend that you use the tab key to move through the fields within the rows. This will make data input quicker but also it will validate fields as you tab through them.

### Add and New

1. Once you have completed a row of data you have the option to add more data to the previous row of client and subject data. When you click on the  button at the end of the row the client and subject details from the previous row are copied and placed into a new row ready for you to add more work done data to that subject.
2. If you click the  button at the end of a row a completely new blank row is created ready to add new client data or find an existing client or subject to add work done to.

N.B. If you have Contacts information switched on for the Add Batch screen (How and Where contacted) and you complete these fields, the  button will be unavailable. Only one piece of Work can be added when you use contact information.

### Posting Batches

Once you have completed all the data required for your batch click on the  button. As mentioned earlier, if compulsory fields have not been completed, you will be taken to that field to complete it. After posting the batch AIMS will give you a message saying that the batch was posted successfully. You can then click on the close button to return to the main AIMS screen. It is possible to post the work in the batch and then continue to add more data to the batch but in general you would close this batch and start a new one.

### Mandatory fields

1. Just like in the main AIMS screens, some fields are required on the form to maintain the internal integrity of the database although you do not need to add data to them all. These are:

- Client Section
  - Client Reference
  - First Name
  - Last Name
- Subject Section
  - Subject Reference
  - Date Opened
  - Subject Code
  - Caseworker
- Work Done Section
  - Date
  - Work
  - Quantity
  - Time Spent

2. If you have any default settings for any fields they will be populated automatically as you tab through the fields. If defaults are set up on Client and Subject References they will start out with a temporary reference (e.g. /08/-1). Once the row has been posted to the database, this will become a complete client reference which has been extracted from the database.

## Field Rules



Certain fields will default to today's date. If you wanted to change this you can just overwrite it.

When you post a batch, where information is compulsory in a field and the field has been left blank, you will receive a warning message and then the focus will move to the field that requires attention. If there is more than one you will be taken to the next one when you try to post the batch again. When all compulsory fields have been completed you will receive a message saying that the batch has been posted.

## Finding Existing Clients and Subjects



Although you can use Add Batch to post completely new clients, subjects and work done into the database, you can also search the database for clients and subjects that already exist in AIMS so that you can add additional subjects or work done.

## Search Rules


Using the  and  buttons at the bottom of the Add Batch screen will allow you to search the database for any piece of information that is stored in either the Client Reference or the Subject Reference respectively.

For both fields you can use search rules of Starts With (i.e. the first few character of a reference) or Wildcards (i.e. \*07\* = all references where 07 appears anywhere within the reference)


## How to Retrieve Client Details

1. In the Client Reference field type either the full reference of an existing client or use the search rules (begins with or the wildcard character \*) with some data from the reference. You can also use the same rules to search in the First Name or Last Name field
2. Either click on the  button on the Client Reference field (for reference searches) or click  on the button bar (for First/Last Name searches) to see the Matching Clients window.
3. For example, bb (or bb\*) would return all client references in the database that begin with bb whereas \*07\* would return all references that contain the numbers 07 anywhere within the reference (see below)

Client Reference

bb 

Client Reference

\*07\* 

Matching Clients

Reference	Client	Postcode
JB/08/21	Joe Bloggs	E4 5RT
BB/08/22	Bernard Bobson	

OK Cancel



Matching Clients

Reference	Client	Postcode
BG/07/2	Ms Barbara Guest	CR23 8FT
SG/07/11	Mr Simon Green	E7 5TG
SD/07/19	Mr Stephen Davenport	M6 7RG
CK/07/20	Ms Claire Kong	E1 7BD

OK Cancel

4. Select the required client from the list and then click OK (or double click the client)
5. The client details fields in the row will be populated with the data held for that client in the main database and your cursor will move into the Subject Reference field ready to add data

## How to Retrieve Subject Details

1. You can search for subjects using either the subject ID, reference or use the search rules (begins with or the wildcard character \*) with some data from the reference
2. Click the  button on the Subject Reference field or click  on the button bar to see the Matching Subjects window. If you have previously searched and selected a client as above then the subject search will only look for subjects that belong to that client.
3. For example JP (or JP\*) will return all subject references that begin with JP whereas \*07\* will return all references that contain the numbers 07 anywhere within the Subject Reference (see below)

Subject Reference

Client	Client Ref.	Subject Ref.	Subject Code	Date Opened
Mr Stephen Davenport	SD/07/19	JP/28/07	ACC.END.C	07/03/2007
Ms Claire Kong	CK/07/20	JP/29/07	ACC.END.F	09/05/2007
L Williams	WL/05/12	JP/30/07	ACC.SEE.F	09/05/2007
Ms Barbara Guest	BG/07/2	JP/31/07	EMP.END.B2	22/05/2007
Mr Stephen Davenport	SD/07/19	JP/32/08	WEL.CON.C	06/03/2007
Ms Claire Kong	CK/07/20	JP/33/08	ACC.END	08/05/2007
Joe Bloggs	JB/08/21	JP/34/08	WEL.CON.B	17/03/2008

Subject Reference

Client	Client Ref.	Subject Ref.	Subject Code	Date Opened
Ms Sonya Smith	SS/06/9	SL/9/07	FAM.CH.I.A	06/05/2006
Ms Sonya Smith	SS/06/9	RC/10/07	WEL.CON.B	03/05/2007
Mr Simon Green	SG/07/11	PW/12/07	ACC.SEE.H	22/01/2007
Dr J Lock	JL/06/17	RC/23/07	FAM.CH.H	12/05/2007
Mr Stephen Davenport	SD/07/19	JP/28/07	ACC.END.C	07/03/2007
Ms Claire Kong	CK/07/20	JP/29/07	ACC.END.F	09/05/2007
L Williams	WL/05/12	JP/30/07	ACC.SEE.F	09/05/2007
Ms Barbara Guest	BG/07/2	JP/31/07	EMP.END.B2	22/05/2007

4. Select the subject required from the list and click OK (or double click a subject)
5. The subject details will be retrieved from the main database and the client and subject fields will be populated with the correct data

## Work Done

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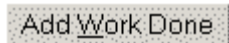
The work done screen is where you add details of work done relating to a specific subject.

### Opening the Work Detail screen

1. The Work Done screen can be accessed from the Work Done button on the Subject Header in the Client History screen,



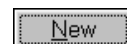
or from the Add Work Done button in the Quick Data Entry Screen.



Every subject has its own button which will only take you to the Work Done screen for that subject.

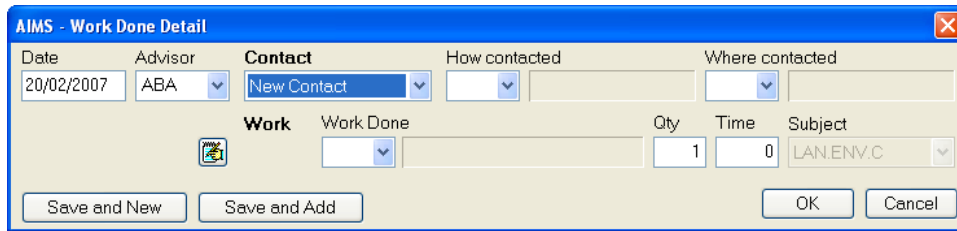
Clicking on the pencil icon in the Client History screen, or clicking on the Add Work Done button in the Quick Data Entry screen opens the Work Done window:

2. By clicking on the 'New' button you can open a Work Done Detail screen. This screen sits on top of the Work Done screen and lets you see what is being filled out on the Work Done screen displayed behind it.



## Adding Work as the result of a Contact with the Client


The Work Done Details screen allows you to add information about both the work you did for the client and the contacts you had with them.




1. The date field will default to today's date. You can change this if required.
2. The Advisor field should be set as required from the drop down combo box. Once selected, it will remain as selected till the Work Detail form is closed.
3. Select "New Contact" from the Contact field drop down combo, this will activate the 'How Contacted' and 'Where Contacted' fields.

### Note

Contacts can be hidden completely, or the How and Where contacted fields can be configured to be on or off and/or compulsory so your particular screen may look different from the one shown here.

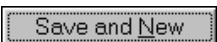
4. The Work Done field is a drop down combo field – select the appropriate entry. Every Contact must have at least one piece of Work attached.
5. The  icon opens the Notes Field. A free text field will appear where you can enter any notes you want to be associated with the work done record. The note will be available within the Work Done screen, but you will not be able to view the note from within the Quick Data Entry screen. It is possible to configure this icon not to appear on the Work Detail form
6. Fill in the other fields as appropriate.
7. When you have completed the Work Done Detail, click the 'OK' button to close the Work Done Detail screen and post the details to the Work Done screen.

## Adding further work to a Contact

1. If you wish to record more than one piece of work against a particular contact you can continue to add more Work against the Contact by clicking the 'Save and Add' button. This will leave the top line Contact Details (Date, Adviser, How and Where contacted) unchanged and make the active field the Work Done field ready for you to specify. 

## Adding a new contact detail


1. If you wish to add a new contact detail, for instance an interview in the

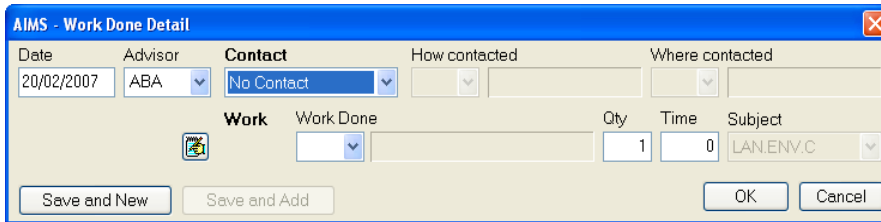



morning with the client and a telephone conversation in the afternoon, you should use the 'Save and New' button.

This would then save the Work Details that you had previously selected against the top line Contact Details (Date, Adviser, How and Where contacted) and place you back in a fresh Work Detail screen where you could specify the new contact information.

### Adding Work where there has been no contact with the client

1. Open the Work Done screen and click the 'New' button. 
2. The date field will default to today's date. You can change this if required.



3. The Adviser field defaults to the logged on adviser and can be changed from the drop down combo box.
4. Select "No Contact" from the drop down combo box. The How and Where contacted fields will be greyed out.
5. Move to Work Done combo box and fill in the rest of the screen as required.
6. If you wish to add more work details click the 'Save and New' button.  You can now either accept the same Date and Adviser settings as the previous entry and add more work details or select a new date and/or adviser.

## The Work Done Screen

1. All Work Done details where there has been no contact with the client recorded against the same date will appear within their own area. A purple divider line separates one date from another.

The screenshot shows a software window titled "AIMS - Work Done". At the top, it displays "Subject: Housing Benefit" and "Reference: 03/2008". In the top right corner, it says "Total Time 3h 55". Below this is a table with the following columns: Date, Advisor, How Contacted, Location, Work Done, Qty, Time, Subject, Ref., Note, U/D, and Doc. The table contains several rows of data, with a purple horizontal line separating entries for different dates. The first entry is for 12/02/2007, involving JS, a Personal Visit in agency, with tasks like Form Filling and Interview. A "Total" row for this date shows 1h 00. Subsequent entries are for 04/02/2007, 09/01/2007, 06/01/2007, and 14/11/2006, each with different advisors and tasks. At the bottom of the window, there is a "Last Reviewed" field set to 06/01/2007, and buttons for "New", "Add", "Edit", "Delete", "Print", and "OK".

Date	Advisor	How Contacted	Location	Work Done	Qty	Time	Subject	Ref.	Note	U/D	Doc
12/02/2007	JS	Personal Visit	In agency	Form Filling	1	0h 30	WELMEAD				
				Interview	1	0h 30	WELMEAD				
						Total	1h 00				
04/02/2007	JS			General Case Work	1	0h 15	WELMEAD				
	JS			Telephone	1	0h 15	WELMEAD		Called		
09/01/2007	JS			General Case Work	1	1h 00	WELMEAD				
06/01/2007	ABA			File / Case Review	1	0h 00	WELMEAD		Review		
14/11/2006	JS			Correspondence	2	0h 40	WELMEAD				

2. Where the Work Done involved contact with the client, the time spent is always totalled and displayed beneath the details of the contact. Each new contact is separated by a purple divide line. An overall total of the time spent on a case is displayed in the top right corner of the Work Done form.

## Time summaries on the Work Done screen

The time display will show the actual amount of time as it was recorded against a work done detail. Where the Work Done Detail was part of a New Contact a sub total will also be displayed of the total time associated with that contact.

## Editing a work detail

1. You can edit any Work Detail after it has been saved by either double-clicking on the particular line in question or highlighting the line on the screen and clicking the 'Edit' button.
2. The Work Details screen that was used to add the original data will appear and all information in it can be altered.

## Note

Changing the date of an entry may move it to a different place on the Work Done screen, as will changing the status of a contact record into a work details only record.

## Deleting a work detail

1. Once a Work Detail has been saved, you can delete it by highlighting the line on the screen and clicking the 'Delete' button.
2. A pop-up screen will ask you to confirm your request to delete the record. Press 'OK' if you are sure.

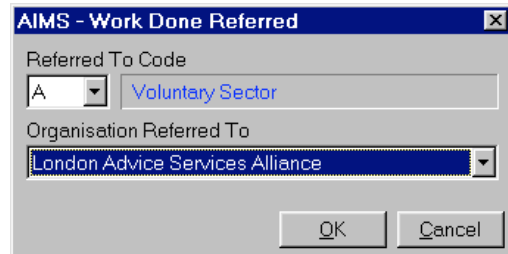
## Note

This will delete the individual line not any other Work Details that form part of the Contact. Any time recorded against that work detail will also be removed from the total time spent on the case.

### Referred to, Notes field, User Defined fields and Document Linking

Every line of Work Done can have further information attached to it. Four types of data can be held.

1. By double clicking on the Ref. (Referred To) field a drop down combo box will appear. From here you can specify the type of agency you have referred the client to and if you have configured the system to hold the data you could also display the agencies name.



### Note

Which Organisations can be referred to is defined in the Global Address Book for further details please see the section of the guide, [The Global Address Book](#).

2. By double clicking on the 'Note' field of the line of work details a drop down free text field will appear. When a note has been entered, the first hundred letters will appear in a pop-up box if you place the mouse cursor over the Notes column. See below for more details.
3. By double clicking on the U/D (User Defined) field of the line of work details, any fields that have been specially configured by your organisation will appear in a pop-up window.
4. By double clicking on the 'Doc' field on the line of work details you can attach a link to a document held either on your computer or on the network. See below for more details.


## Formatting Notes

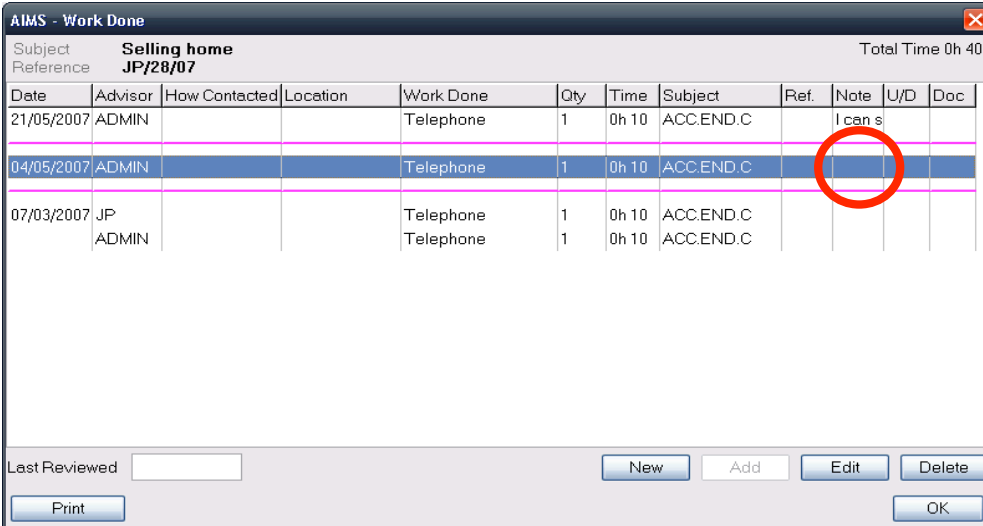
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Certain AIMS notes fields can contain formatted notes which can also be spell checked. This means that using a familiar interface, you can add word processor style fonts and formatting to text which is placed in the following AIMS notes fields:

- Diary Notes
- Work Done Notes
- Outcome Notes

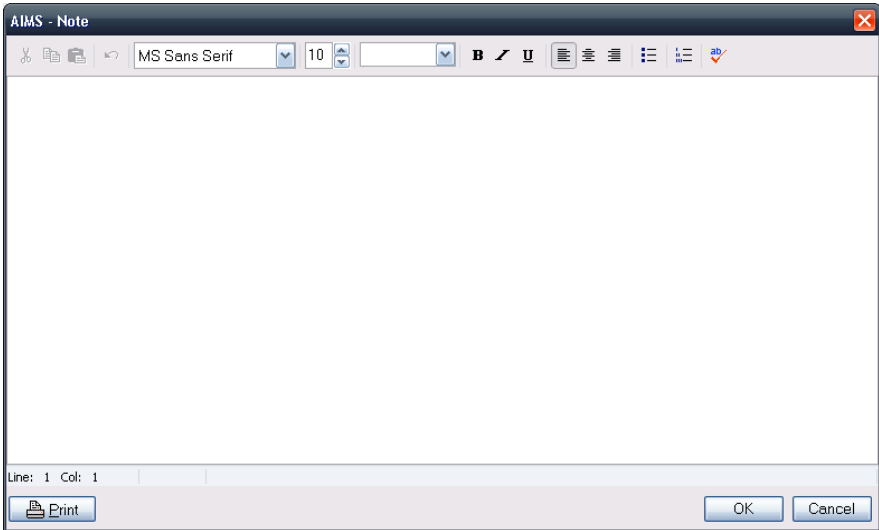
### Adding Formatted Notes

1. When you are on a screen that allows notes to be added, the Add Note button (right) will appear. This button appears in the AIMS – Diary Entry, Work Done Detail and Outcome screens. 
2. In the Work Done screen you can also add notes by double clicking in the notes column adjacent to the line of work that you would like to add a Work Done note (circled below).

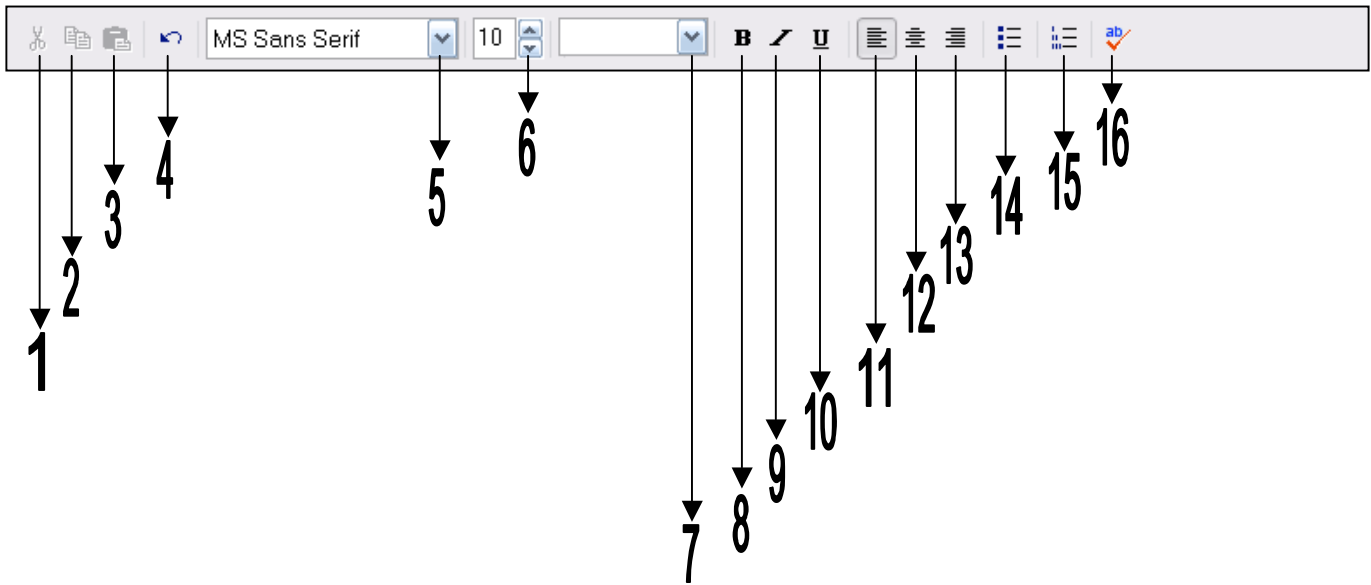


Date	Advisor	How Contacted	Location	Work Done	Qty	Time	Subject	Ref.	Note	U/D	Doc
21/05/2007	ADMIN			Telephone	1	0h 10	ACC.END.C		l can s		
04/05/2007	ADMIN			Telephone	1	0h 10	ACC.END.C				
07/03/2007	JP ADMIN			Telephone Telephone	1 1	0h 10 0h 10	ACC.END.C ACC.END.C				

3. When you click on the Add Note button, the AIMS – Note window will appear.



4. The AIMS – Note screens have a tool bar from which you can select the different formatting options. This toolbar uses standard windows icons to symbolise the options. The diagram and table below explain what these are.



Key to Icons	
Number	Function
1	Cut
2	Copy
3	Paste
4	Undo Last Change (will only undo one change, click again to revert)
5	Select Font Drop Down
6	Font Size Spinner
7	Select Font Colour Drop Down
8	Bold Text
9	Italics
10	Underlined Text
11	Left Justified text
12	Centred Text
13	Right Justified Text
14	Switch on/off Bullets
15	Select Bullet Style (press repeatedly to cycle)
16	Spell Check entire note (can be switched off in configuration)

5. You can also use standard Windows keyboard shortcuts, such as CTRL-B for bold in the formatted notes screens. A full list of these shortcuts can be found in the Windows help files.
6. When you have finished inputting your note, click OK and the note will be saved. All other functionality for notes remains the same.



N.B. The Subject Note field is character limited and does not therefore have the new formatting functionality.

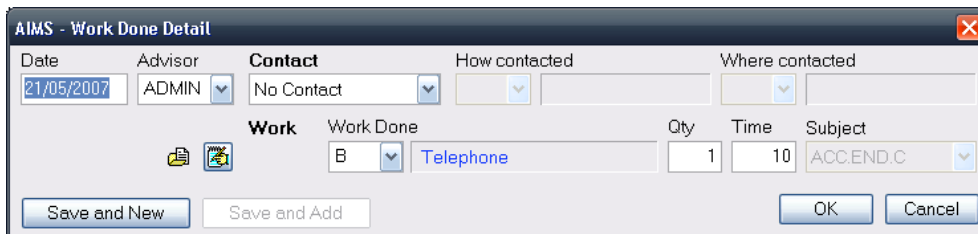
## Linking Documents

Another new feature in AIMS allows you to link a document to a Work Done entry. This means that extended notes, letters or any other related document can have a clickable link attached to the Work Done entry. This does not mean that the documents are stored inside of the AIMS database. All documents remain in the place they are stored on your computer or server but a shortcut link to that location is included within the Work Done entry.

### Adding Links

You can add a link to a Work Done entry in two ways:

1. From the Add Work Detail screen, click on the  button. This will open a standard Windows select file screen allowing you to browse to your document. When you have highlighted the required document click the  button. The document is now attached to the Work Done entry.




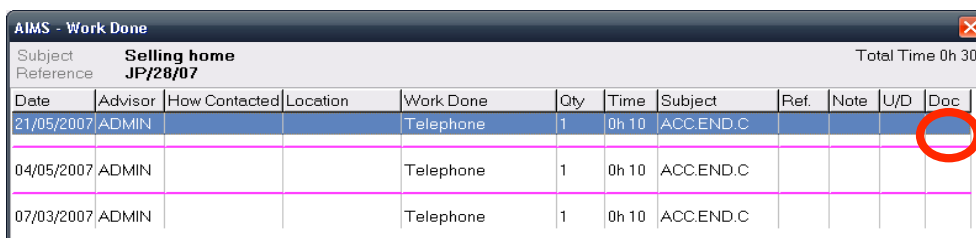
AIMS - Work Done Detail

Date	Advisor	Contact	How contacted	Where contacted
21/05/2007	ADMIN	No Contact		

Work Done: B Telephone Qty: 1 Time: 10 Subject: ACC.END.C


Buttons: Save and New, Save and Add, OK, Cancel

2. You can also add a link by double clicking on the Doc column while in the main Work Done screen (circled below), this will take you directly to the Windows select file screen. Highlight the file and click the  as above to create the link.




AIMS - Work Done

Subject: Selling home Reference: JP/28/07 Total Time: 0h 30



Date	Advisor	How Contacted	Location	Work Done	Qty	Time	Subject	Ref.	Note	U/D	Doc
21/05/2007	ADMIN			Telephone	1	0h 10	ACC.END.C				
04/05/2007	ADMIN			Telephone	1	0h 10	ACC.END.C				
07/03/2007	ADMIN			Telephone	1	0h 10	ACC.END.C				

### Viewing Link Documents

To view a document that has been linked to a Work Done entry, either click on the link details shown in the Doc column of the Work Done screen or while in the Edit screen (Work Done Detail) for the entry, click on the document link icon . This will directly open the linked document. Holding your mouse cursor over the Doc column will show you the first 100 characters of the link location.

### Deleting a Document Link

If you want to remove or change the link in a Work Done entry:

1. Highlight the Work Done entry and click 
2. Right mouse click the  button and select Clear Document Link
3. You will be asked to confirm the deletion, click Yes
4. Click OK to close the Work Done detail screen

To change the link to another document, delete the link and then add another as per the instructions above.

## Outcomes and Closing a Case

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The Outcomes screen is where information relating to what happened as a result of the advice or information given to the client can be recorded. Two different types of outcome can be recorded, one is descriptive and the other is financial. Each subject can have several outcomes attached.

The screen is divided in three parts:

Coded Outcomes		Financial Outcomes			
Outcome		Outcome	Date	Amount	Frequency
A - Success		B - Additional Benefit	25/12/01	£68.30	per 4 Weeks

- The left hand side contains the Coded Outcomes box which is accessed from its own set of Add, Edit and Delete buttons underneath the Coded Outcomes pane.
- The right hand side contains the Financial Outcomes box which also has its own set of Add, Edit and Delete buttons.

Financial outcomes require you to complete a coded description (of the nature of the financial detail being recorded), the date the money became available, the amount of money and finally the frequency with which the client will receive that money.


From this information you will be able to calculate how much income has been raised on behalf of clients over any given period.

- The lower part of the screen contains a notes field where you can record any free text comments e.g. quotes from the client concerning the quality of the service. It also includes the field where you enter the date the case was closed.

In addition there is a field which shows the total time spent working on the Subject to date.

### Adding Outcomes

The Outcome screen is accessed from within a Subject, and relates only to that subject. To open the Outcome screen:

1. Click on the red "Outcome" button situated on the Subject Header  in the Client History screen.

2. Outcomes can also be added from the subject area of the Entry screen by clicking on the Outcomes button



Quick Data

3. Select either the Coded Outcome field or the Financial Outcome field using the Add button or keystroke alternative (Tab through form and use return key when button is activated).
4. Open the drop down combo box and select entry. For Financial Outcomes all the fields must be completed.

### **Editing Outcomes**

1. Go to the Outcome screen and select the outcome that you wish to edit.
2. Either click the Edit button linked to that type of outcome or, using the mouse, double-click the particular outcome you wish to edit.
3. Once you have edited the outcome, click OK to save your changes or Cancel if you wish to leave it the same.

### **Deleting Outcomes**

Go to the Outcome screen and select the outcome that you wish to delete.

Click the Delete button linked to that type of outcome.

1. A dialogue box will open asking 'Delete this Coded (or Financial) Outcome?' Click 'OK' to confirm your action.

### **Closing a Case from the Outcomes screen**

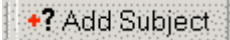
1. To close a case, enter the appropriate date into the Date Closed field. This field appears here in the Outcome screen and also on the Subject Detail screen.

#### **Note**

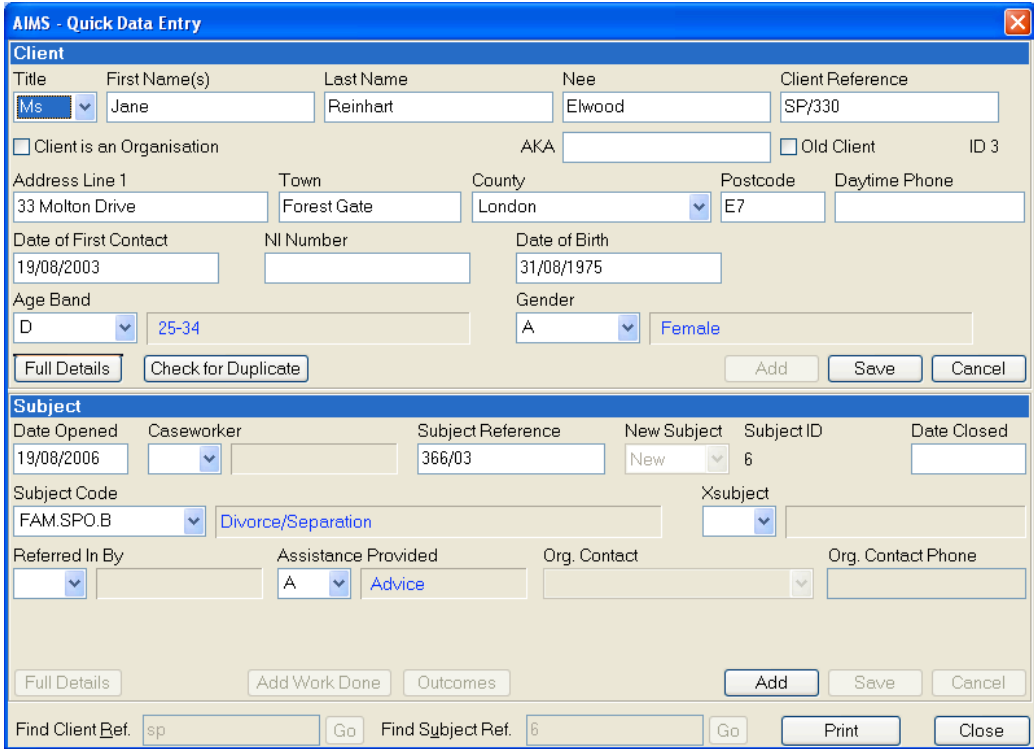
- When the Closed Date field is completed, it will "post" the closed date to the Subject Header in the Client History screen.
- Once a case has been closed it is still possible to open the case to view case notes etc. A warning will appear saying 'This subject has been closed.' will appear when you do so.

## Using The Quick Data Entry Screen

The Quick Data Entry (QDE) screen combines elements of both the Client Details and Subject Details screens, and allows access to all other parts of AIMS. You can add clients, subjects, work done, outcomes etc. from this screen.

The QDE screen is accessed by clicking on the Add Subject button at the top of the Aims Main Form, or by using the keyboard alternative Ctrl + Q 


The QDE screen is divided into 2 halves. The top half shows a shortened version of the Client screen **for whichever client is active on the Client History Screen**. The bottom half of the QDE allows you to add Subject details.



The screenshot shows the 'AIMS - Quick Data Entry' window. It is divided into two main sections: 'Client' and 'Subject'.  
**Client Section:**  
- Title: Ms (dropdown)  
- First Name(s): Jane  
- Last Name: Reinhart  
- Nee: Elwood  
- Client Reference: SP/330  
- Client is an Organisation:   
- AKA:   
- Old Client:   
- ID 3:   
- Address Line 1: 33 Molton Drive  
- Town: Forest Gate  
- County: London (dropdown)  
- Postcode: E7  
- Daytime Phone:   
- Date of First Contact: 19/08/2003  
- NI Number:   
- Date of Birth: 31/08/1975  
- Age Band: D (dropdown), 25-34  
- Gender: A (dropdown), Female  
- Buttons: Full Details, Check for Duplicate, Add, Save, Cancel  
**Subject Section:**  
- Date Opened: 19/08/2006  
- Caseworker:   
- Subject Reference: 366/03  
- New Subject: New (dropdown)  
- Subject ID: 6  
- Date Closed:   
- Subject Code: FAM.SPO.B (dropdown), Divorce/Separation  
- Xsubject:   
- Referred In By:   
- Assistance Provided: A (dropdown), Advice  
- Org. Contact:   
- Org. Contact Phone:   
- Buttons: Full Details, Add Work Done, Outcomes, Add, Save, Cancel  
- Find Client Ref: sp (text), Go (button)  
- Find Subject Ref: 6 (text), Go (button)  
- Print (button), Close (button)

### Adding Client Details via the QDE screen

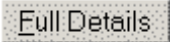
Clicking on the 'Add' button in the client half of the screen clears the previously active client and allows entry of new client details into the now blank client screen.

Clicking on the 'Check for Duplicate' button allows you to search for potential duplicate clients in your database. 

For more information see the [Duplicate Search](#) section of this guide. Once you have entered some client information and are ready to save click on the 'Save' button which will become available.

You can then go on to add subjects to the client you have just created by entering subject information in the bottom half of the screen. For more information see the section of the guide on [Adding a Subject in the Quick Data Entry Screen](#).

## Note

Only the first four to six fields of the client profile information will be available when adding clients through the QDE screen. To access all fields on the client screen, click  on the 'Full Details' button.

This will open the Client Detail screen. See the section on [Adding a Client](#) for information on adding client details.

## Accessing Subject full details, Work done, Outcomes from the QDE Screen

Once a Subject has been saved it then becomes possible to access other functions from within the QDE screen. The buttons at the bottom of the screen allow the relevant details to be added to the Subject selected, e.g. Full Details, Add Work Done, and Outcomes.



In addition to adding new Subjects to an existing Client record it is possible to use the "Find Subject Ref" field to input the reference or Subject ID number of an existing subject. This will then be displayed in the Quick Data Entry screen showing the client and subject details of the selected record. Once this record is displayed users have access to the Full Details, Add Work Done, and Outcome Screen for that particular record.

Once you have completed updating that particular record you can then use the Find Ref field to find and update another record without leaving the QDE screen.



## Note

Detailed information about adding subjects, work done, outcomes, searching on Client Reference or Client ID, Searching on Subject Reference or Subject ID can be found in the relevant sections of this guide:

[Adding a Subject in the Quick Data Entry Screen.](#)

[Work Done](#)

[Outcomes and Closing a Case](#)

[Searching by Client Reference or Client ID](#)

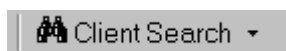
[Searching by Subject Reference or Subject ID](#)

## Searching

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### Searching for a Client

Clicking on the client search button in the AIMS



main screen will

open the screen below:

A dialog box titled 'Search for Client' with a close button (X) in the top right corner. It contains a table with five columns: 'Client/Org. Name', 'Client Reference', 'Address Line 1', 'Postcode', and 'Show'. The 'Show' column has a dropdown menu with 'Date of Birth' selected. Below the table are buttons for 'Search', 'Clear', 'OK', and 'Cancel'. A message at the bottom reads 'Double-click row, or press OK to select.'

Client/Org. Name	Client Reference	Address Line 1	Postcode	Show
				Date of Birth

This screen is used to search for a particular client or set of clients that exist within the AIMS database.

1. Using the four fields at the top of the form you can enter the various values by which you wish to search. It is best to start most searches by using only one of the search fields. You can enter values in more than one field but this can give rise to very limited results.

#### Example searches:

“Space” (single carriage return on space bar) when in the Client/Org Name field stands for “Any first name”.

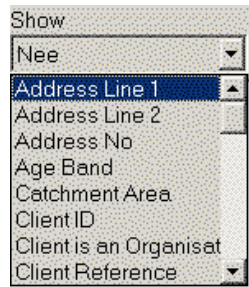
‘ R’ = “Space R” all entries where the second name begins with R (there is a space at the beginning before the R)

“Rob” = (No Space but including the \* wildcard symbol) all first names beginning with Rob, e.g Rob, Robin or Robert.

#### Refining the results of a search

2. The results of a search will be displayed one record to a row in the search window. If you need more information about a particular record before you can decide which is the required one you can either redefine your search by using a second search criterion or use the Show field to reveal particular information relating to each record.

- Once a record is identified, double-clicking the record or clicking the OK button will take you to the Client History screen for that client or organisation.
- If you find that this is the wrong record or wish to view other records that appeared in the earlier search, clicking the 'Client Search' button on the top menu will take you back to the Search screen. This screen will still display the results of the earlier search as well as the search criteria.
- Should you need to clear the existing search criteria use the 'Clear' button at the bottom of the screen. This clears the search criteria not the list of clients.



### Searching for a recently accessed Client

To the right of the Client Search button is a small arrow. Clicking this will show a drop down list of clients recently accessed in your current AIMS session. Selecting one of these with your mouse will make that client the active client.



### Searching by Client Reference or Client ID

The Find Client Ref. field appears on the Welcome screen and on the Quick Data Entry (QDE) screen.



You can enter either a Client Reference or a Client ID into the field. If the Client Reference or ID is sufficiently accurate, clicking the 'Go' button will take you directly to the Client History screen for that Client, otherwise a 'Matching Clients' screen will open.

Reference	Client	Subject	Opened	Closed
JS/99/0134	Mr Dan Shaw	Housing Benefit	11/11/01	
JS/99/0134	Mr Dan Shaw	Pay & conditions	30/08/99	

Double-clicking a client and their Subject will take you to their Client History screen with the Subject highlighted.

If when entering a Client reference or ID into the field you only enter a part of the Reference or ID the search looks for all References or ID's that begin with that sequence.

## Searching by Subject Reference or Subject ID

The Find Subject Ref. field appears on the Welcome screen and on the Quick Data Entry screen.

A screenshot of a software interface showing a search field. The field is labeled "Find Subject Ref." and contains a white input box. To the right of the input box is a grey button with the text "Go" in white.

You can enter a Subject Reference or Subject ID into this field. If the References or ID is unique, clicking the 'Go' button will take you directly to the Client History screen for that Client with the Subject highlighted. Otherwise a 'Matching Clients' screen will open where you can double-click the particular Subject you require.

## Duplicate Search

The Duplicate Search facility is described in the section, [Duplicate Search](#) which is part of the section [Adding a Client](#).

## Using Wildcards

Wildcards \* and ? may be used when defining search criteria for any of the above searches.

- \* represents any sequence of either alpha or numeric characters (a string)
- ? represents any single alpha numeric character

## Conflict of Interest

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The COI function is only available in AIMS Extra.

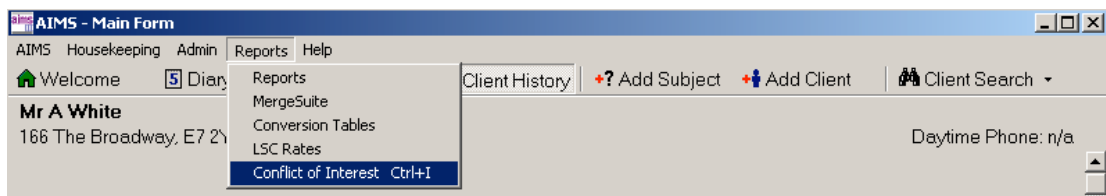
The Conflict of Interest (COI) function allows you to search for clients and/or organisations that in some way may be associated with another client or organisation in the database.

Agencies that undertake COI searches in relation to their casework should have their own procedures for when to undertake COI searches and what to do when they discover a conflict of interest.

The AIMS COI module allows for very wide ranging searches that may assist agencies with these procedures by helping to identifying potential conflicts.

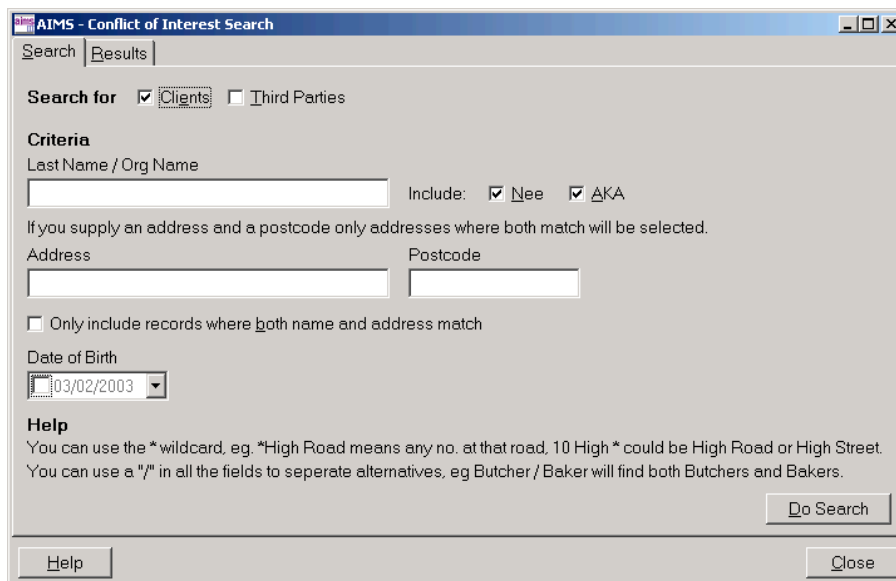
### Opening the COI Search window

COI can be opened via the button at the bottom right of the Welcome Screen or from the drop down menu under Reports.



The COI function is configurable and can be switched off. If switched off the button will disappear from the Welcome screen, but the drop down menu option will remain available.

The COI window is divided into two sections (described below), either of which can be accessed via the 'Tabs' at the top of the window.



## The Search Screen

The Search screen allows you to search for Clients (including Organisational clients) and/or Third Parties, using combinations of Name, Address and Post Code information.

Searches can be constructed to include combinations of any or all of these details. See the section 'Multiple search criteria within a single field' below for details on how to do this.

Example 1:

Last name equals "Black / Brown / Green" AND Address equals "\*\*Broadway\* / \*Highfields\*" AND Post Code is "E7\* / E8\* / MK10\*".

It is possible to narrow or widen your search by requiring AIMS to either match all fields (narrowing) or display matches from any of the fields selected (widen). To narrow the search tick the "Only include records where both name and address match" before doing the search.

Only include records where both name and address match

When constructing a search, you should ensure you have used the appropriate search rules and field selection to identify the potential conflict.

Example 2:

Neighbour disputes may not be with next door neighbour but with the person backing onto the property. Therefore ensure the correct road name and post code have been entered, not the prospective clients.

When searching for a Client the search matches not only the Last Name or Organisation Name, but it will also look at Nee Name and AKA field last names if those boxes are ticked.

**Criteria**  
Last Name / Org Name  
  
Include:  Nee  AKA

The Address field will search all three of the possible addresses attached to the client record, and if specified will also look at third party address details.

The Post Code field will search all post code fields attached to the each of the three possible client addresses, and if specified will also look at third party post code details.

**Search for**  Clients  Third Parties

The Date of Birth search criteria can be specified in addition to all the above search fields and will identify anyone who matches that exact date, regardless of whether they match any other criteria. This field is only visible if the Date of Birth field has been configured to appear on the Client screen.

**Date of Birth**  
 03/02/2003

## Multiple search criteria within a single field

To facilitate searching for a single client who might be known by several names or who has lived at several addresses it is possible to have multiple searches within the same field.

By separating each searched for item by a front slash “/” a list can be built up. This can be done in more than one field if required.

Example 3:

AIMS - Conflict of Interest Search

Search Results

Search for  Clients  Third Parties

Criteria

Last Name / Org Name  
Black/Brown/White

Include:  Nee  AKA

If you supply an address and a postcode only addresses where both match will be selected.

Address Postcode  
\*Broadway\* / \*Highfields\* E7\* / E8\*

Only include records where both name and address match

Date of Birth  
03/02/2003

Help  
You can use the \* wildcard, eg. \*High Road means any no. at that road, 10 High \* could be High Road or High Street.  
You can use a "/" in all the fields to separate alternatives, eg Butcher / Baker will find both Butchers and Bakers.

Do Search

Help Close

Last name equals “Black / Brown / White”  
Address equals “\*Broadway\* / \*Highfields”  
Post Code is “E7\* / E8\*”.

## Search rules: “Contains the value” & Wildcards

The Last Name/Organisation name field within COI uses a “contains the value” type search which will return results (or hits) of any record that includes that sequence of letters.

Example 4:

Searching for “house” will return both Whitehouse and Houseman. It would also return any organisational clients who had that word in their name, e.g. the “House Jack Built” housing co-op.

In the Address and Post Code fields a wildcard character can be inserted into the search which can stand in for any sequence of either alpha or numeric characters.

Example 5:

“\*high road” will find any number house on that high road.

Using the “\*” wildcard when searching for postcodes; Entering “IG10” on its own will not find an address “IG10 1DS”, but “IG10\*” will find all the postcodes in the IG10 area.

Once the various search criteria have been entered clicking on the button will move you to the Results screen.

Do Search

## Search Results

The Search Results screen lists all those records that have in some way matched the criteria.

Name	Address	Match
Brown, Mr B	12 The View, Brighton, BN2 5ES	Client Last Name
C, Ms Green	Flat 15, Highfields Gdns, London, E8 7NT	Client Address 1
Smith, Mrs Freda	16a Simpson Street, Hackney, London, E8 6FY	Client Address 1
White, Mr A	166 The Broadway, E7 2YB	Client Last Name, Client Address 1

In the above example which represents possible results from the search in Example 3, various clients have been returned:

Mr Brown	Matched on Client last Name
Ms Green	Matched on Client Address Line 1
Mr White	Matched on Client Address Line 1
Mrs Smith	Matched on Client Last Name, Client Address Line 1

The reason for the match is listed on the right of the display.

Double clicking on a match will take you to the Client History Screen or subject header of the record that has the matching details. As you do this, the COI module minimises so that you can move around the client’s record to view whether there is a conflict of interest.

## Returning to the COI Screen

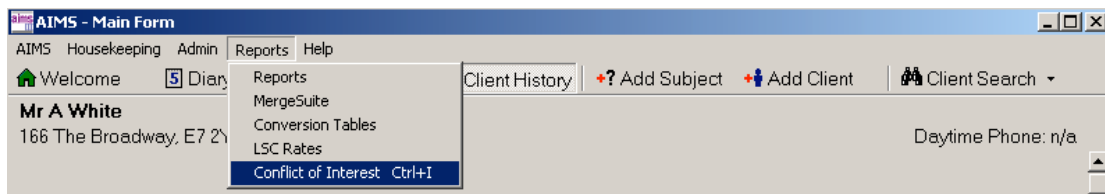
When you have looked at the client’s record you can return to the COI screen. The COI Search Results are retained until a new search is undertaken. This allows you to move back and forth through several possible matches to investigate more fully whether they are potential conflicts of interest. There are three ways in which you can re-open the screen.

If you have moved to a client record and the COI module can be re-opened by clicking on the re-store feature of the minimised window at the bottom of your screen.



Alternatively you can type “Control+I” (hold down the ‘Ctrl’ button and then push the ‘I’ button) to return the COI Results screen.

Finally you can activate COI from the drop down menu under Reports in the top menu bar.



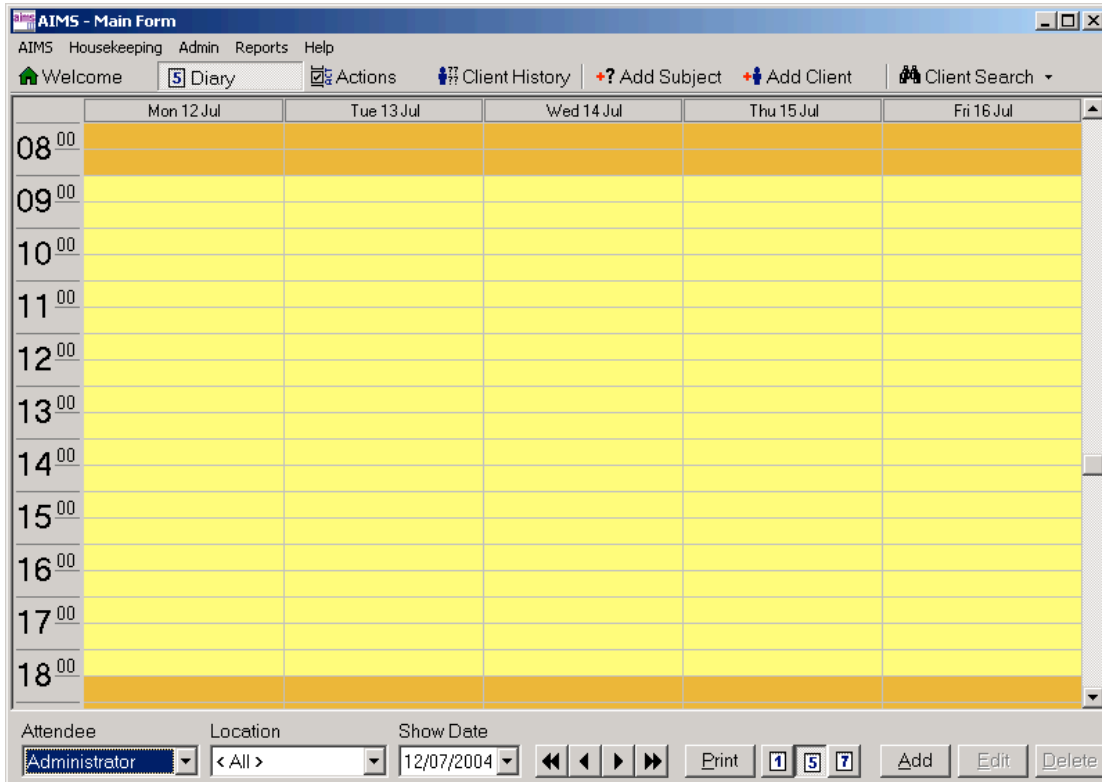
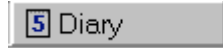
The Search results, including the search criteria used, can be displayed on screen and then printed out for a file record if required. Click the ‘Print’ button.



## The Diary

The Diary in AIMS is designed as a centralised diary that allows your agency to keep track of appointments within your agency for all users and clients.

The main diary screen is opened by using the Diary button which is found on the top menu bar.

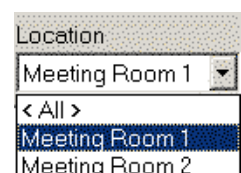


The main areas of the diary screen are:

- The diary view area which shows you what appointments have been entered for the period being viewed. In the above example it is set to show five days at a time.
- The Attendee field. This field allows you to view the diary for individual users. To use this field you click the scroll arrow to the right of the field and select the required view. In the example on the right it is set to show the diary for the user John Smith. By selecting the <All> option you can display the diaries of all users on the same diary view.



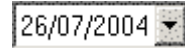
- The Location field allows you to view the diary for individual locations for example meeting rooms. In this example it is set to show the diary for the location meeting room 1. By using the <All> options you can display the diary for all locations on the same diary view.



- By combining both the Location and Attendee fields selections together you can identify who is where at any time.

- The 'Show Date' area. There are two ways of selecting the date:

- By clicking the scroll arrow to the right of the Show Date field and selecting the date required from the pop-up calendar.



- By using the diary view keys to move through the calendar view.



- The single arrow keys move you one day at a time through the diary '1 Day per page' view and one week at a time through the '5 Days per page' and '7 Days per page' views
- The double arrow keys will move you four weeks at a time if you are in the '5 Days per page' or '7 Days per page' view.
- The double arrow keys will move you one week at a time if you are in the '1 Day per page' view.



- The 'Days to a Page' selectors. It is possible to view diary appointments in three different views: one day to a page, five days to a page and, seven days to a page. The different views are selected by choosing the appropriate days per page button.



- If you are in the '5 Days per page' or '7 Days per page' view and select a particular day using the mouse then, when you select the '1 Day per page' view, the day selected will be the day viewed.

- The Add, Edit and Delete buttons. These buttons allow you to add, edit and, delete diary appointments.

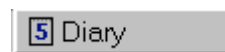
## Adding a Diary Appointment

There are several places within AIMS from which you can add a diary appointment. These are:

- From the main Diary screen.
- From a Subject Header in the Client History screen
- From the Action Manager screen

### Adding an appointment from the main Diary screen

1. Use the Diary button on the top menu bar to open the Diary screen.

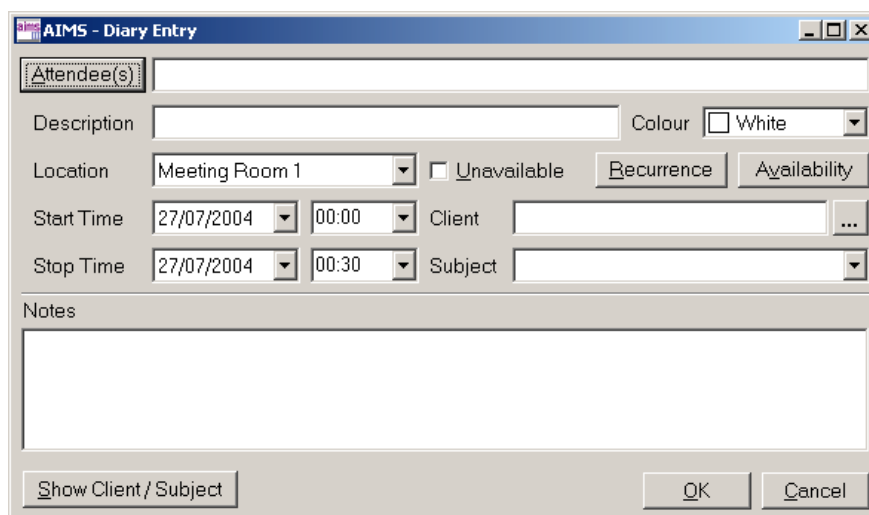


2. There are now two ways you can open the Diary Entry form.

a. Click the 'Add' button on the Diary screen.

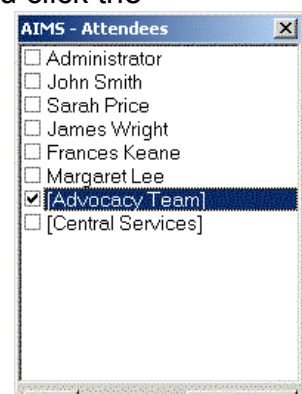
Or

b. Double-click with the mouse in the Diary view the particular date and time you want to create the appointment. This will open the Diary Entry form with the date and start time of the appointment already filled in.

A screenshot of a software window titled 'AIMS - Diary Entry'. The window contains several input fields: 'Attendee(s)' (a text box with a dropdown arrow), 'Description' (a text box), 'Colour' (a dropdown menu with 'White' selected), 'Location' (a dropdown menu with 'Meeting Room 1' selected), 'Unavailable' (a checkbox), 'Recurrence' (a button), 'Availability' (a button), 'Start Time' (two dropdown menus for date and time, showing '27/07/2004' and '00:00'), 'Client' (a text box with a dropdown arrow), 'Stop Time' (two dropdown menus for date and time, showing '27/07/2004' and '00:30'), and 'Subject' (a text box with a dropdown arrow). Below these fields is a 'Notes' section with a large empty text area. At the bottom of the window are three buttons: 'Show Client / Subject', 'OK', and 'Cancel'.

3. Select who will attend the meeting from your organisation. If you click the 'Attendee(s)' button an Attendees selection window will open offering you a list of all the people who are set up as users of AIMS. Click the tick box by the side of those people you wish to invite to AIMS.

Clicking on the "All" button allow you to invite all AIMS users to a meeting without having to click on each name separately.

A screenshot of a software window titled 'AIMS - Attendees'. The window displays a list of names with checkboxes next to them. The names are: Administrator, John Smith, Sarah Price, James Wright, Frances Keane, Margaret Lee, [Advocacy Team], and [Central Services]. The checkbox for '[Advocacy Team]' is checked. The window has a standard Windows-style title bar and a close button in the top right corner.

You can also invite groups of people (for example everyone in a particular team) to a meeting by setting up a group containing the relevant individuals (see the configuration section). Clicking in the box for the relevant group invites all members of the group to the meeting.

## Notes

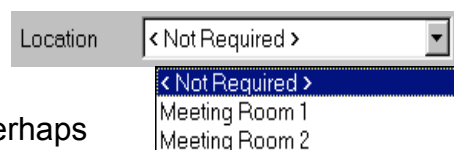
- The user making the appointment will automatically be invited to the meeting.
- It is not possible for someone to be invited to attend more than one meeting at the same time i.e. if they are already attending a meeting at the same time that you wish to organise your meeting it will be impossible to organise your meeting. You will get the message 'Attendees/Location not available ...'

4. Enter a short meaningful description of the meeting's purpose. The Description field is a mandatory field which is displayed both in the main Diary screen and in the diary listing on the Welcome screen.

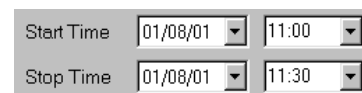
5. It is possible to highlight an appointment in the main diary screen by using colour. Click the arrow at the side of the Colour field and select the required colour.



6. Select the Location for your meeting using the arrow to the right of the Location field - a drop down list will appear offering you a choice of rooms to book. If you are meeting at a different location, perhaps one outside of your organisation, or if you do not require a location, select the 'Not Required' option.



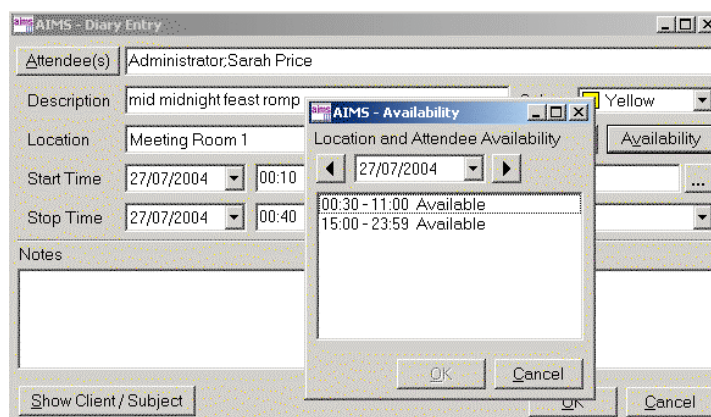
7. Now select the Start Time and Stop Time for the appointment.



8. If you are not sure whether the location or attendees are available for the times you require you can check their availability by clicking the Availability button.



9. This will open the Availability window which will show you which times are available given the combination of Attendees, Location and Start/Stop Time you have selected.

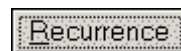


10. Check whether the time you have selected for your appointment is one of those which are shown as available in the Availability window. If not you have three options:

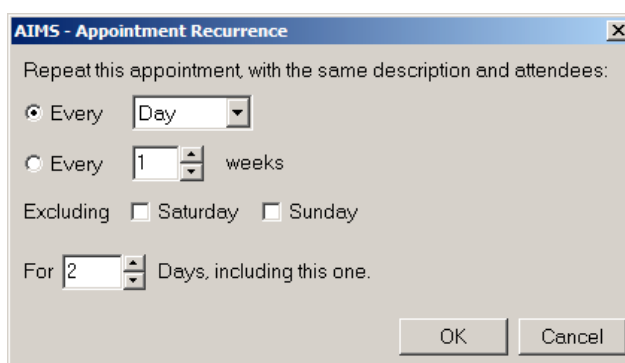
- Note which times are available on that day, close the Availability window and then re-enter those available times in the Start Time and Stop Time fields.

- b. Use the arrow keys at the top of the Availability window to select another day and when you have found a suitable time close the Availability window and re-enter those available times in the Diary Entry form.
- c. Close the availability window and select another location or select different attendees for the meeting. Having done this you would then need to check their availability again.

11. If your appointment is a recurring appointment (e.g. a team meeting that takes place every week), clicking on the recurrence button opens the appointment recurrence window.



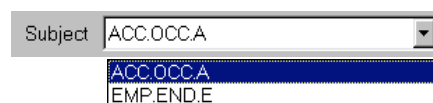
12. This allows you to block out appointments for the specified attendees at the same time each day, week, month or year for a specified period (e.g. 6 weeks, 6 months etc.).



13. If your appointment is with or is concerning a client you can link that client to the appointment. This is done by clicking the '...' button. This will open the 'Search for Client' window. Having found the client, double-clicking their entry in the 'Search for Client' window will enter their name in the Client field. The client's name will also appear in the appointment header in the main Diary view and in the diary listing in the Welcome screen for the relevant AIMS user.

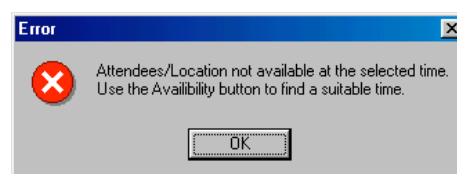


14. Having linked a client to an appointment it is then possible to select one of the client's subjects as the topic of the appointment. This is done by clicking the arrow to the right of the Subject field and then selecting the required choice from the drop down list.



15. Having created the appointment and entered all the details that you require you should now close the Diary Entry form. There are two ways to do this. Whichever method you choose checks that the details that you have entered are correct and then posts the appointment to the main Diary screen.

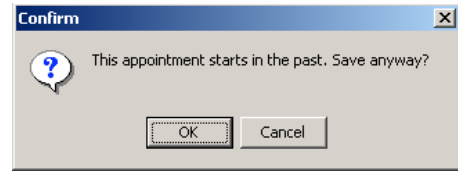
- a. Click the 'OK' button. This checks the appointment and returns you to the main Diary screen where you will see the appointment displayed.
- b. Click the 'Show Client/Subject' button. This checks the appointment and if Client/Subject have been linked to the appointment takes you to the subject's Subject Header in the Client History screen.



**Note**

If when closing the appointment the following message appears you should re-read numbers 9 and 10 above.

If you try to create an appointment that occurs in the past, you will get a message “This appointment occurs in the past. Save anyway?” Click cancel to return to the diary entry screen and select another date / time or OK to accept.



**Adding a Diary appointment from the Client History screen**

On each of the Subject Headers in the Client History screen there is a diary button.




1. Clicking the diary button on a Subject Header will open the Diary Entry form with the Client and Subject fields filled in. The information in the Subject field will be specific to whichever Subject Header you have selected.
2. The Diary Entry form should be filled in as in the section ‘Adding an appointment from the main Diary screen’.
3. When you have completed the form, clicking the ‘OK’ button will check the details you have entered and return you to the Client History screen.
4. It is also possible to use the Client Diary button at the bottom of the screen to open the Client Diary window. There you can open a Diary Entry form with only the Client field filled in.



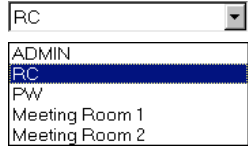
## Adding a Diary appointment from the Action Manager

If you are working in Action Manager and you wish to create an appointment you can do so by:



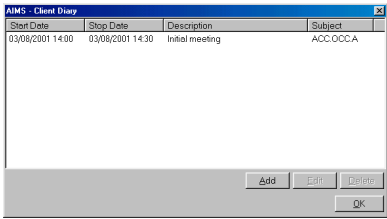
1. Clicking on the Add Appointment button. 
2. This will open the Diary Entry form with the Client and Subject fields filled in.
3. The Diary Entry form should be filled in as in the section 'Adding an appointment from the main Diary screen'.
4. When you have completed the form, clicking the 'OK' button will check the details you have entered and return you to Action Manager.

## Viewing a Diary Appointment

### Viewing an appointment where you know which Advisor is attending

1. Go to the main Diary screen
2. Set the 'Show Diary for...' field to show the diary for the advisor. 
3. Using the 'Show Date' fields move through diary looking for the appointment.
4. When you find the correct appointment, double-clicking the appointment will open the Diary Entry form with all the details displayed


### Viewing an appointment where you know which Client is attending

1. Use the Client Search button to open the 'Search for Client' screen, locate the client and then go to their Client History screen 
2. Or, if you know their Client or Subject reference or their Client or Subject ID use the 'Find Client/Subject Ref' fields on the front screen to go directly to their Client History screen. 
3. On the Client History screen, clicking the Client Diary button at the bottom right of the screen will display all of that client's appointments in the Client Diary window. 


## Editing a Diary Appointment

In order to edit a diary appointment you must first find the diary appointment you wish to edit and then open the appointment using the Diary Entry form. Finding the diary appointment uses the same procedure as 'Viewing a Diary Appointment' described above.


### Editing an appointment where you know which Advisor is attending

1. Follow steps 1 to 3 of 'Viewing a Diary Appointment ... which Advisor is attending' described above.
2. When you find the correct appointment single click the appointment with the mouse.
3. Now click the Edit button at the bottom of the main Diary window. This will open Diary Entry form as an editable form. 
4. Click the 'OK' or 'Show Client/Subject' button to save your changes.

### Editing an appointment where you know which Client is attending

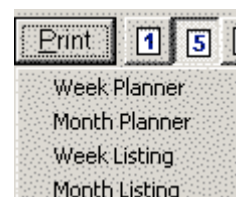
1. Follow steps 1 to 3 of 'Viewing a Diary Appointment ... which Client is attending' described above.
2. In the Client Diary window select which appointment you wish to edit.
3. Now click the Edit button at the bottom of the main Diary window. This will open Diary Entry form as an editable form. 
4. Click the 'OK' or 'Show Client/Subject' button to save your changes.

## Deleting a Diary Appointment

1. To Delete an appointment follow the same procedures as described in 'Editing a Diary Appointment' above except that instead of clicking the Edit button, click the Delete button when you have found the appointment you wish to edit. 
2. A box will open asking you 'Delete this appointment?' Clicking 'OK' will delete the appointment.

## Printing Diary Reports

The Print button at the bottom of the diary screen allows you to print a visual monthly or weekly planner, or a monthly or weekly listing of all appointments in the diary for a particular user or users.



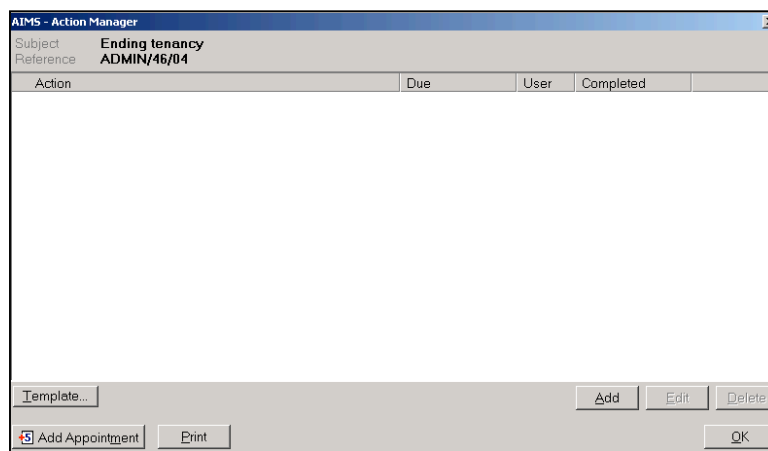
The Action Manager screen is where you can find or create a list of actions that can help you automate some of the actions associated with a case or subject (e.g. sending letters, completing pro forma's, reminding you of deadlines).

## Creating an Action Manager List

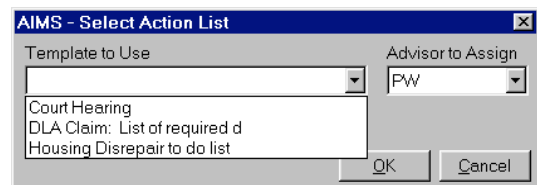
1. The Action Manager screen can be accessed from the Subject Header in the Client History screen.



2. When you first open the Action Manager the central screen area will be blank. You can choose either to add your own action list or go to the template and select one of the pre-defined lists.



3. When you click on the Template button the Select Action List box appears. This allows you to choose the template that will help with the subject you are in.

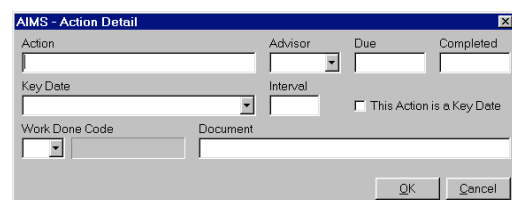


4. Select the template you require using either the mouse or your keyboard arrow keys and the Return key. The Advisor assigned to do the tasks will see any dates or action list reminders appear in their Diary or Action Manager listing on the Welcome screen.

### Note

Which template you will need to select will depend on how your agency has designed its templates.

5. If you do not use a Template list you can create your own "to do" action list to help you with your work. If you click the 'Add' button an Action Detail box will appear which will enable you to specify future actions or reminder lists.



6. The only required field is an Action. Make the description meaningful so when it is reported in the task list you know what needs to be done.

- Any Action that is ticked as a Key Date will become available in the Key Date field as a drop down list for subsequent action details.

If this Key Date is selected when creating a subsequent Action Detail you can specify the interval between the Key Date and the new Action. The interval can be either a whole number to be added to the Key Date or a minus number to be subtracted from the Key Date.

This results in a date either before or after the Key Date which will be displayed in Action Manager and in the Action Manager listing on the Welcome screen.

**Note**

An action can be ticked as a Key date even when no due date has yet been assigned to it and subsequent actions can be related to this key date. When a date is subsequently added to the key date, all actions that have been based upon this key date (via specification of an interval) will automatically calculate their appropriate display dates.

- You can also add your own actions to a pre-existing template using the Add button once the template has been selected.
- Work Done allows you to specify the type of work associated with the action. Only actions with work done entered will be reported to the work done screen when the action is completed.


**Note** - Actions with no work attached are more like reminder lists.

- Once actions have been added they will appear in the Action Manager list attached to the current subject. Items which are Key Dates are indicated by a blue key icon to the left of the description.

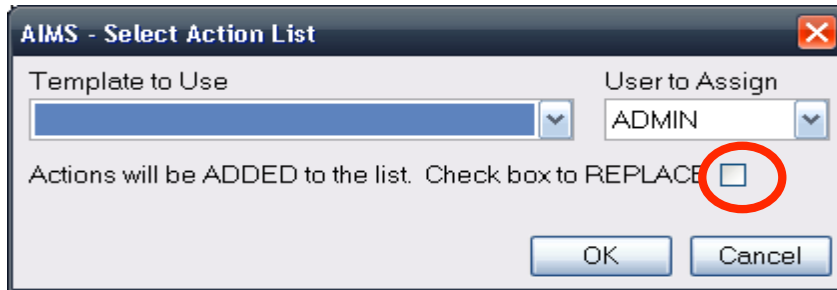
Action	Due	Advisor	Completed
<input type="checkbox"/> Post hearing interview, review options	inactive	ADMIN	
<input type="checkbox"/> Defence submission	inactive	ADMIN	
<input checked="" type="checkbox"/> Court Hearing Date	inactive	ADMIN	
<input type="checkbox"/> Customer Care Letter	inactive	ADMIN	
<input type="checkbox"/> Start Date	inactive	ADMIN	

## Adding Multiple Templates

AIMS allows you to add multiple templates to a subject so that you can build more complex Action Lists as a case progresses.

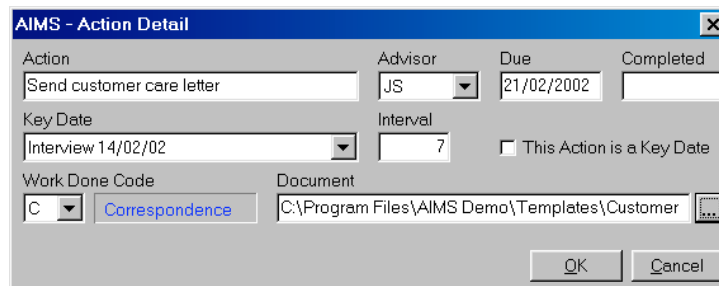
To add another template simply open Action Manager from the subject header by clicking the  icon and then select the **Template...** button. You can now select a template from your pre prepared list which will be added to the existing actions.


If you would like to replace the existing list of actions with a new template then you should check the box on the Select Action List screen (circled below).



## Creating an Action that will Merge a Document

An Action detail can have a mail merge Word document attached to it. Once attached, the letter will be run when the action is marked as completed. A mail merge document is created by your organisation and is based upon the fields within AIMS. For further details on setting up Mail Merge, please see the section [Setting up Mail Merges](#).



1. To create an Action that will open a Mail Merge document, click the '...' button. This will open the windows 'Select Document' window. 
2. Navigate to the Template directory and select the template that you require. In the AIMS installation this is 'C:\Program Files\AIMS\Templates' but this may have been changed by your organisation.
3. Clicking the 'Open' button will return you to the 'AIMS – Action Detail' form.
4. Selecting a Work Done Code will mean that when the action has been completed and the document merged, the Work Done Detail form will open and you will be able to record how much time you spent on the task.

## Updating Actions

During the course of the case work certain key dates which can not be known at the start of a case will need to be updated when they become available e.g. the date of a court hearing or a tribunal.

1. The AM screen can be accessed from the Subject Header in the Client History screen via the Action Manager button.
2. Select the action that needs to be updated.



3. Enter the date of the specified action in the Due field then click 'OK'. This will update all Actions associated with that Key Date.

## Completing Actions

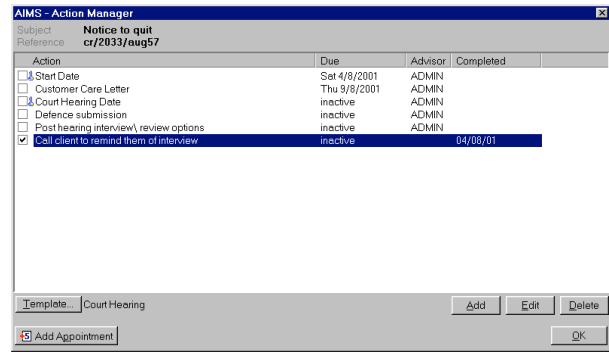
1. For Actions that have been completed, the Action List will most frequently be accessed from the Action Manager section of the Welcome screen. Double-clicking on an Action in the Action Manager listing will display the associated Action List.

Start Date	Advisor	ACCEND
Saturday 04 August	Prof. P Lum	ACCEND
Thursday 09 August	Prof. P Lum	ACCEND

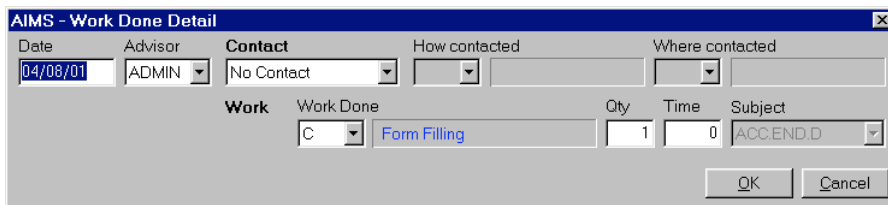
2. The Action List can also be accessed from the Subject Header in the Client History screen via the Action Manager button.

Action	Due	Advisor	Completed
<input checked="" type="checkbox"/> Start Date	Set 4/8/2001	ADMIN	
<input type="checkbox"/> Customer Care Letter	Thu 9/8/2001	ADMIN	
<input checked="" type="checkbox"/> Court Hearing Date	inactive	ADMIN	
<input type="checkbox"/> Defence submission	inactive	ADMIN	
<input type="checkbox"/> Post hearing interview\ review options	inactive	ADMIN	
<input type="checkbox"/> Call client to remind them of interview	inactive	ADMIN	

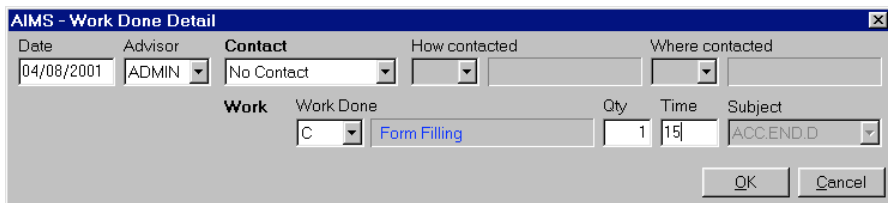
- For actions that have been completed but have no Work Done associated with them, click on the tick box to the left of the screen for the appropriate action. A tick will be displayed next to the action to indicate it has been completed and a date will appear in the completed column. The item will no longer appear in the Action Manager listing on the Welcome screen.



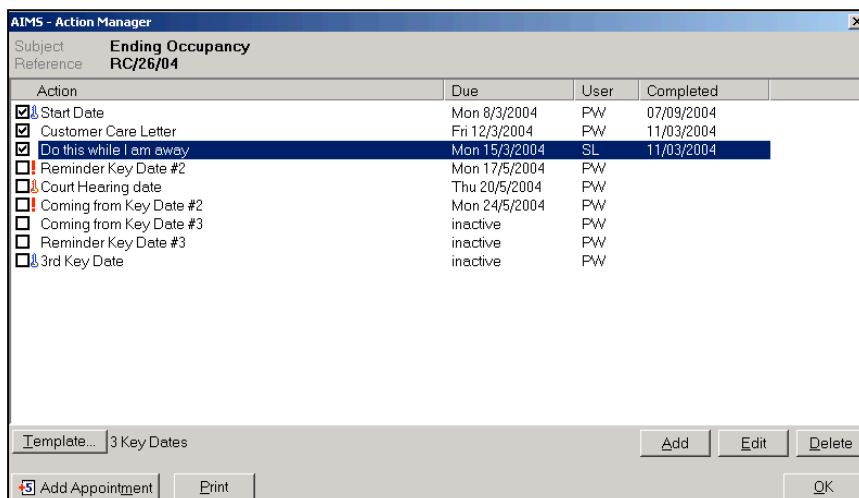
- For actions that have been completed and that have work done associated with them, click on the tick box to the left of the screen for the appropriate action. The Work done detail screen will be displayed.



- You can enter the amount of time it took to complete this work in the time field and press 'OK'.



A tick will be displayed next to the action in the Action List to indicate it has been completed and a date will appear in the completed column. The item will no longer appear in the Action Manager listing on the Welcome screen.



## Action Manager Templates

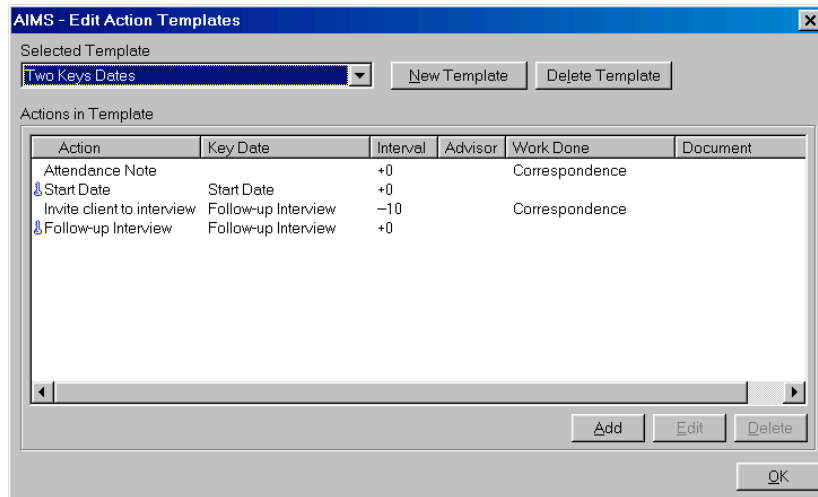
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This function is only available in AIMS Extra. A user will need to have administrative access rights to work in this area of AIMS (see [Managing Users](#)).

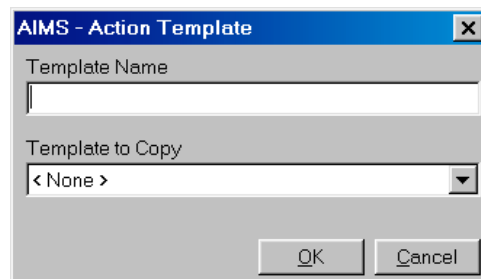
Action Manager Templates are pre-defined lists of actions that can be used to automate some of the actions associated with a case or subject. Once created the templates are used in the **Action Manager** where they are attached to a particular subject and at this point they can be adapted by the user to their specific requirements.

### Creating an Action Manager Template from New

1. New Action Manager Templates are created in the Edit Action Templates form which is accessed by selecting "Admin" on the Menu Bar. Then from the drop down list select "Action Manager Templates". You can also use the 'Alt M' keystroke followed by a 'T' keystroke to alter this form. A window similar to the one below will appear.



2. To Create a New Template click the New Template button. The Action Template form will then open.

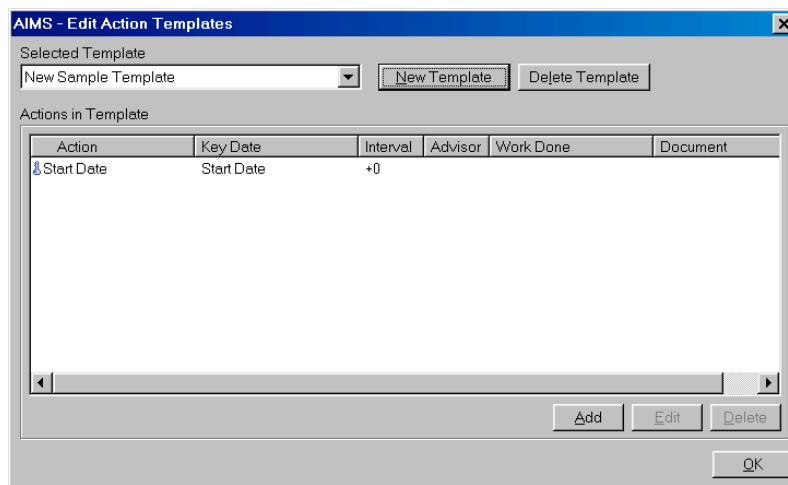


3. Each new template must be given a unique name. It is also advisable that the name is sensible and gives a clear sense of the templates function. For example: Housing Repossession or DLA Case Referred to SS Commissioners.

## Note

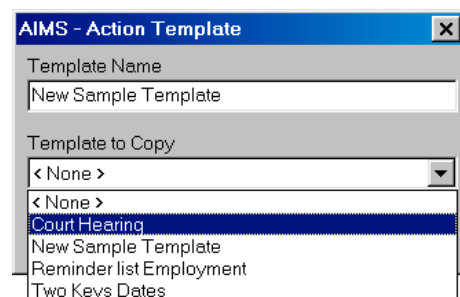
A new template can either be constructed entirely from new or it can be based on an existing template. If you want to base your template on an existing template then see the following section [Creating a New Template that is based on an Existing Template](#).

- As you are creating a template completely from new, click the 'OK' button without selecting a 'Template to Copy'. This will return you to the Edit Action Templates form with the newly named template displayed. What you can now see is a new template that has only one action in it, the Start Date. This is only activated when the template is attached to a Subject using the Action Manager. For the template to be of any practical use you will need to add further actions to the Template. Please see the section below [Adding Actions to a Template](#).

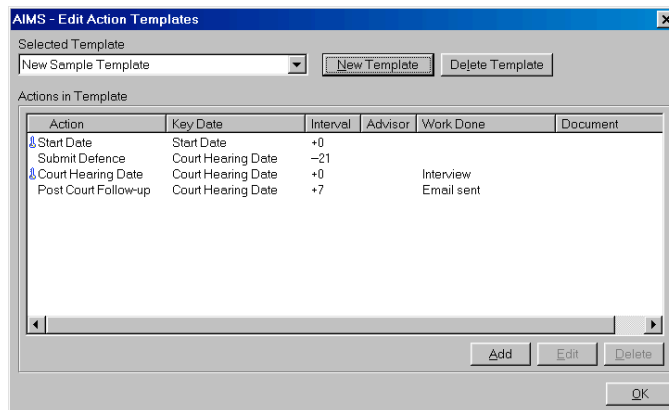


## Creating a New Template that is based on an Existing Template

- Follow the instructions in points 1 to 3 in the above section. You should have the Action Template form open with a newly named template displayed. Use the arrow at the right of the 'Template to Copy' field to display a drop down menu of your existing templates. Select the one you want to base your new template. When ready to confirm your choices, click the 'OK' button.



- This will return you to the Edit Action Templates form with the newly named template displayed. What you can now see is the new template with the actions from the copied template displayed.



- At this point you have three alternatives.
  - You might not want to make any alterations to the template (i.e. the template is finished). In this case click the 'OK' button.
  - You might want to add new actions to the template. See the section [Adding Actions to a Template](#).
  - You might want to edit some of the actions that already exist in the template. See the section 'Editing Actions in a Template'.

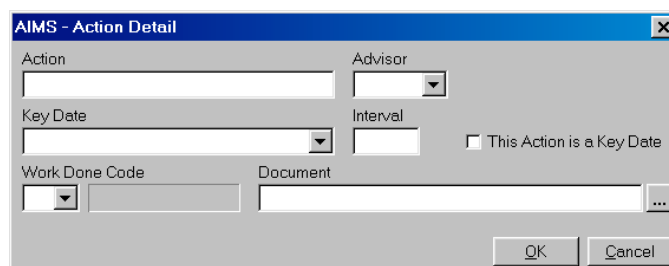
### Adding Actions to a Template

- Before adding an action to a template, check that the correct template is displayed in the 'Selected Template' field. If you have just created a new template then that template should be the one displayed.

#### Note

New actions can be added to any Template using this screen. Select the Template you want to add actions to in the 'Selected Template' field and then proceed as described below.

- Now click the 'Add' button, an Action Detail box will appear which will enable you to specify future actions or reminder lists.



3. The only required field is an Action. Make the description meaningful so that when it is used in the template users will know what action it is describing.



4. The Advisor field should be used to indicate whether an action is the responsibility of a particular person. For example the customer care letter shown above might be the responsibility of an administration worker. Selecting that worker's initials in the adviser field means that when they log on any actions that need to be undertaken will appear in the **Action Manager** section of their Welcome Screen.

5. Next you need to decide whether an Action:

- is a key date (e.g. the start date, a court hearing) about which other actions can be based.
- is an action that needs to be associated with a key date (e.g. a customer care letter going out 4 days after the Start date, or a request to come in for interview shortly before a Court Hearing).




- or an action that stands alone from other actions in the template (e.g. part of a list of things that need to be done) and has no association to other actions.
6. If the Key Date is selected when creating a subsequent Action Detail you can specify the interval between the Key Date and the new Action. The interval can be either a whole number to be added to the Key Date or a minus number to be subtracted from the Key Date. This results in a date either before or after the Key Date which will be displayed in Action Manager and in the Action Manager listing on the Welcome screen.


When a date is subsequently added to the key date, all actions that have been based upon this key date (via specification of an interval) will automatically calculate their appropriate display dates.

7. The Work Done field allows you to specify the type of work associated with the action. Only actions with work done entered will be reported to the work done screen when the action is completed.

### Note

Actions with no work attached are more like reminder lists.

8. An Action detail can have a mail merge Word document attached to it.  Once attached, the letter will be run when the action is marked as completed. A mail merge document is created by your organisation and is based upon the fields within AIMS. Use the '...' to link a mail merge template to your action. See Error! Reference source not found. for further information.

9. Once actions have been added they will appear in the Action Manager list attached to the current subject. Items which are Key Dates are indicated by a blue key icon to the left of the description.  Court Hearing

## 10. Action Manager Assigner

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This feature is only available in AIMS Extra.

AIMS has the ability to assign Action Manager templates to any subject code or group of codes and have this open automatically with the subject. Action Manager templates are pre-defined lists of actions which can be used to automate some of the actions associated with a subject. This means that you could for instance add a template to all housing codes so that a customer care letter could be sent out when a housing subject is created. It is very important to think about how you use Action Manager Assigner as you may not want every new subject to have an Action Manager template added to it.

### **Understanding Exact Match and Begins With**

1. Templates can be assigned to subject codes either as an Exact Match (i.e. only that exact subject code) or by using the begins with concept , e.g. all subject codes beginning WEL for welfare issues based on the tiers within your classification scheme.

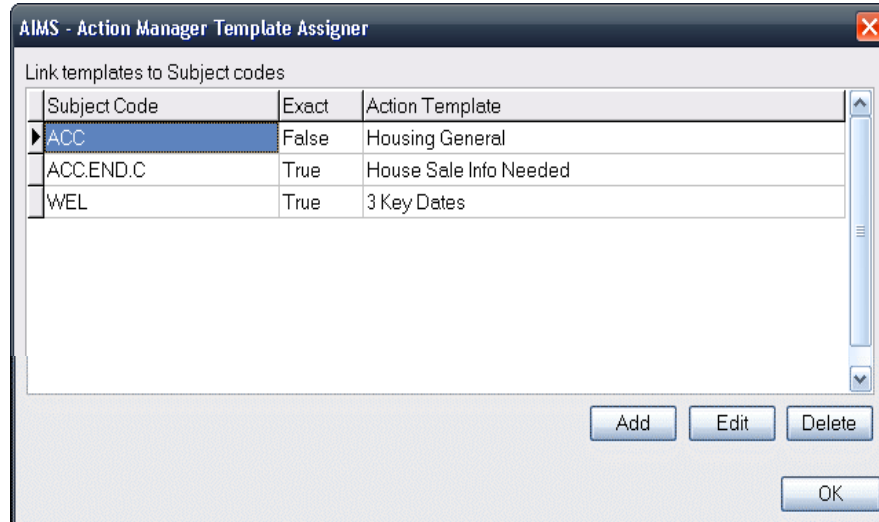
N.B. We use the STATS classification in the following examples. Your system may be different.

2. For instance, if you wanted all clients who have a newly created housing subject to receive a customer care letter you could assign a template (which includes an action to produce a customer care letter) to all ACC codes without selecting the Exact Match option. This would mean that every new subject that was created in AIMS with a code beginning with ACC would automatically have this template applied to it.
3. You should be careful assigning templates to entire groups of codes in this way as you could end up with actions assigned to every subject created. In reality it is more likely that you will only assign templates to specific codes using the Exact Match option.
4. Using the Exact Match option allows you to have precise control over which codes have a template assigned to them. For example, if you had a set list of things to do to help someone with the sale of a house this list might only apply to the ACC.END.C (Selling House) subject code. Using the Exact Match option would only apply the template to subjects that used this particular subject code and would not apply to any others on the ACC group or anywhere else within the classification scheme.

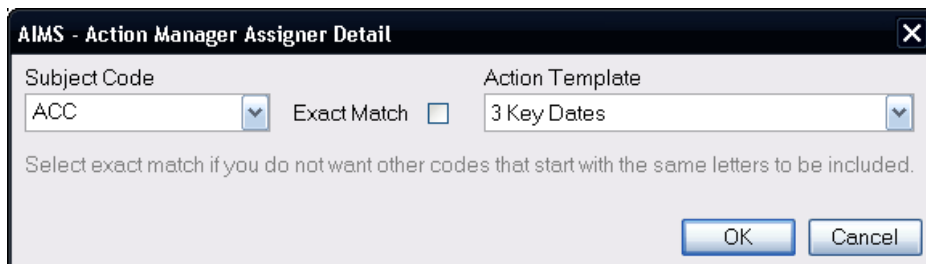
If you regularly use the same subject codes and then add templates or individual actions to them, using Action Manager Assigner in conjunction with Action Manager templates could save a lot of time.

## Opening the Action Manager Assigner

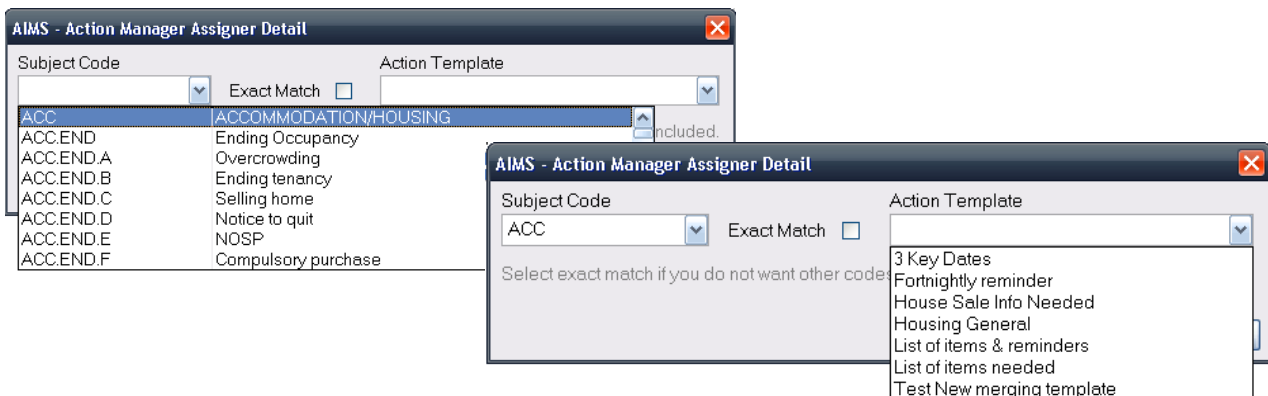
1. Templates are assigned to subject codes using the Action Manager Assigner. You can access this by selecting “Admin” from the menu bar and then selecting Action Manager Assigner from the drop down list. You can also use the ‘Alt M’ keystroke followed by an ‘M’ keystroke to select this form. A window similar to the one below will appear.



2. To assign a template to a subject code, click the **Add** button which will open the AIMS – Action Manager Assigner Detail form (below). You can also edit and delete existing assignments from this screen by selecting the relevant line and clicking Edit or Delete.



3. To assign a template to a subject code, first select the code that you wish to add the template to from the Subject Code drop down, then select the template that you want to assign to the code from the Action Template drop down. Remember to select exact match if you would like the template to apply only to that code.



- Once you have added a template and you then create a subject using that code, the subject header will show a raised Action Manager icon (highlighted with a circle below).

Subject **WELFARE RIGHTS** Reference **ADMIN/52/08**  
 Date Opened **26/02/2008** Last Updated **26/02/2008** Caseworker **ADMIN**



- When you click on the button, the action manager template opens and is ready to use by adding key dates or other modifications. Note that start date is picked up from the subject date opened on templates that have a start date and also the user for the template is taken from the caseworker that the subject was assigned to when it was opened. Where a user is not defined in the template, it will default to the caseworker assigned to the subject.

**AIMS - Action Manager**

Subject **WELFARE RIGHTS**  
 Reference **ADMIN/52/08**

Action	Due	User	Completed
<input checked="" type="checkbox"/> Start Date	Tue 26/2/2008	ADMIN	
<input type="checkbox"/> Customer Care Le...	Sat 1/3/2008	ADMIN	
<input type="checkbox"/> Coming from Key ...	inactive	ADMIN	
<input type="checkbox"/> Coming from Key ...	inactive	ADMIN	
<input type="checkbox"/> Reminder Key Da...	inactive	ADMIN	
<input type="checkbox"/> Reminder Key Da...	inactive	ADMIN	
<input type="checkbox"/> 3rd Key Date	inactive	ADMIN	
<input type="checkbox"/> 2nd Key Date	inactive	ADMIN	

This feature is only available in AIMS Extra.


The Services Used monitor allows you to specify any additional services your organisation is providing over and above the main areas of work already captured by creating Subjects. The monitor will be of use in organisations that offer a range of services and want to keep detailed information on some elements (i.e. using Subject > work done > outcomes) but would also like to see what other services the client is accessing, but without that level of detail.

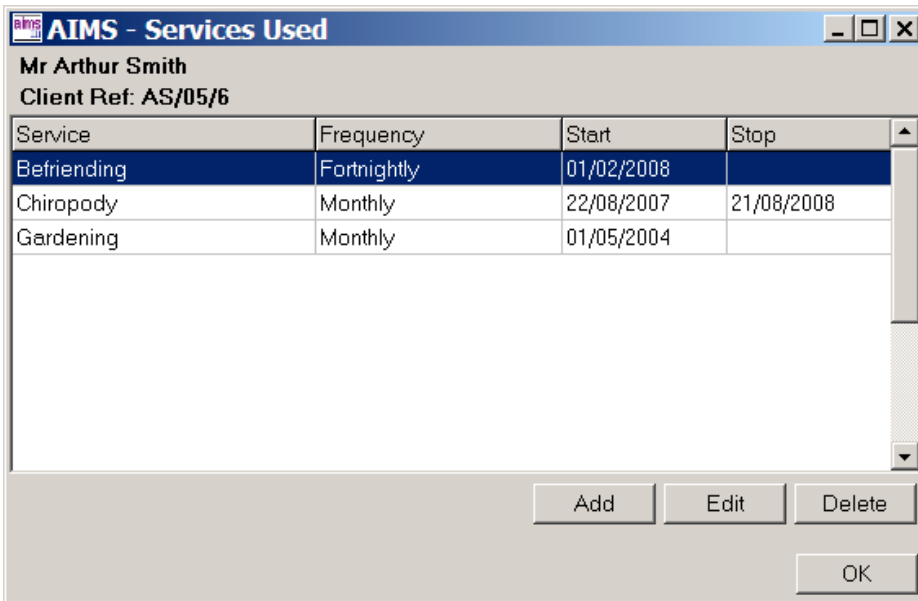
For instance, you may offer clients a gardening service, befriending, lunch club etc. By inputting this information into the Services Used monitor you will be able to see at a glance the full range of services any one client is using, as well as monitoring the profile of all those using the services, e.g. 70% of the clients using our Gardening service are Disabled and of these 40% are retired.

### Adding services via configuration wizard


1. When creating the Services Used monitor the upgrade will create a single example service called "Gardening". To add your own list of services and amend our example entry you will need to have AIMS Administrator rights and go to Configuration > Coded Fields and then Code Lists. Then select the Services Used code list to amend the classification.
2. If you do not want the new Services Used button to appear in the Client History Screen you can choose to "Hide" it by going to the Client History Screen section in the Configuration wizard.

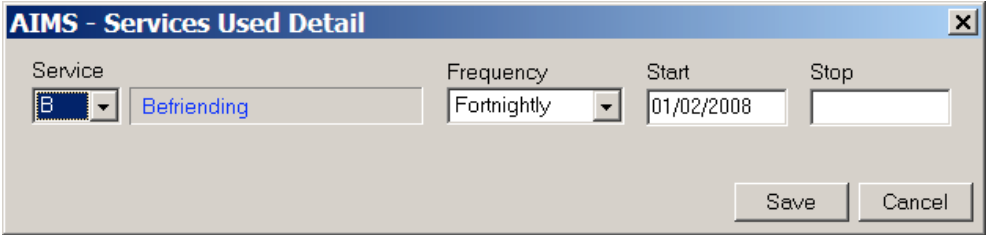
### Creating new service used records

1. The Services Used monitor can be found at the bottom of the Client History Screen, and accessed by clicking on the  button or alternatively using Alt S on the keyboard. A screen similar to the one below will appear.



Service	Frequency	Start	Stop
Befriending	Fortnightly	01/02/2008	
Chiroprody	Monthly	22/08/2007	21/08/2008
Gardening	Monthly	01/05/2004	

2. Clicking on the  button will open the Services Used details box that then allows you to select the Service from the drop down list, choose a frequency and add a start date for the service. See below.



Service	Frequency	Start	Stop
B Befriending	Fortnightly	01/02/2008	

Leaving the Stop date blank indicates that the Service is on-going.

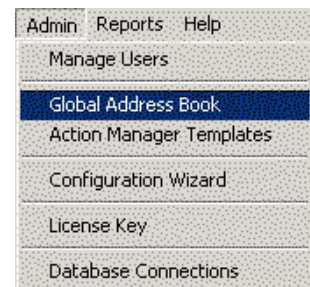
## Global Address Book (GAB)

The GAB is a database within the AIMS database providing you with the ability to hold up to 250 contact details for organisations 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.

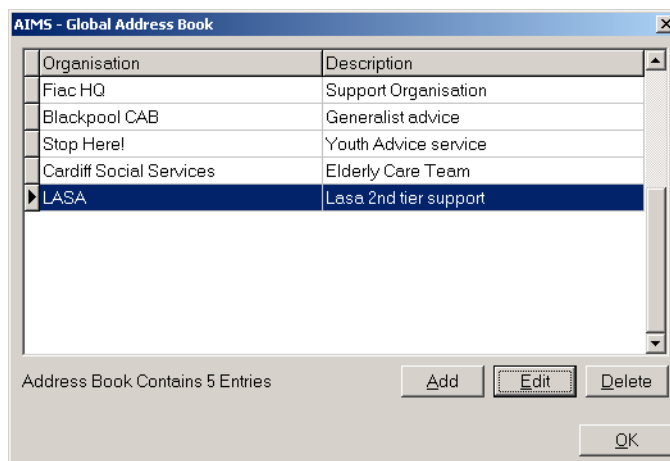
In addition GAB provides you with a way to keep a list of your Referral Agencies which can be attached to the Subject record via the work done “referred to” field.

### Editing the GAB.

Only Users with the appropriate access rights will be able to access the functions described below. To edit the GAB choose Admin → Global Address Book from the menu.



This will bring up the Global Address Book Screen. To add a new entry, click on the “Add” button.



This will bring up the AIMS address book detail screen. From here you can add information about the organisation, including a short description and address information. You are also able to specify the **Referred To Organisation Type**, whether the organisation is one that **Can be Referred to**, and **Default relationship to Third Party**. More information on these options is given below

**Note:** No details of personnel at the organisation are captured at this time, as these can change very quickly. Details of individuals working at an organisation can be added in third party information at the time of creating a linked third party record (see the section of the guide on linked third parties for more information).

### Referred To Organisation Type

Clicking on the drop down arrow under Referred To Organisation Type displays a list of organisation types. This list is configurable by your organisation (see under code lists in the configuration section of this guide). AIMS comes with a default list of organisation types which can be changed if you wish. Any configuration changes you make to the list will be reflected in the GAB.

This allows for reporting on types of organisation referred to over time. For example how many referrals you have made to Youth Access agencies or Law Centres etc.

### Can be Referred to

Ticking this option allows you to flag a GAB entry as an organisation that your organisation can make referrals to. Only entries which have “can be referred to” ticked will appear in the Work Done Screen “Ref.” Field (see the section of the guide on Work Done, under Referred to, Notes and User Defined fields for more information).

### Default relationship to Third Party

Selecting one of the options from the drop down list allows you to set the default relationship for the organisation with a third party (see under linked third parties in this guide for more information on third parties). For example the default relationship with an advice agency you make regularly work with might be “Advisor”. You can change the relationship with the third party if you need to by overwriting the default relationship when creating a link to a third party.

GAB details can form the basis of your third party entries, which are used when creating a mail merge from AIMS. If you wish, you can send a courtesy copy of a letter to your client and to any organisation that you have entered in the third party information, that also works with your client (for more information on this see the [Setting up Mail Merges](#) section of this guide).

AIMS - Mailmerge

Merge Template  
customer care

Principal Addressee  
Client Mailing Address - 22 Green Road, Forest Gate, London, E7 9LD

Courtesy Copy

Client Mailing Address - 22 Green Road, Forest Gate, London, E7 9LD  
 Third Party Address, LASA - Universal House, 88-94 Wentworth Street, London  
 Other / Enter Address Manually

Merge

Close

## Linked Third Parties

---

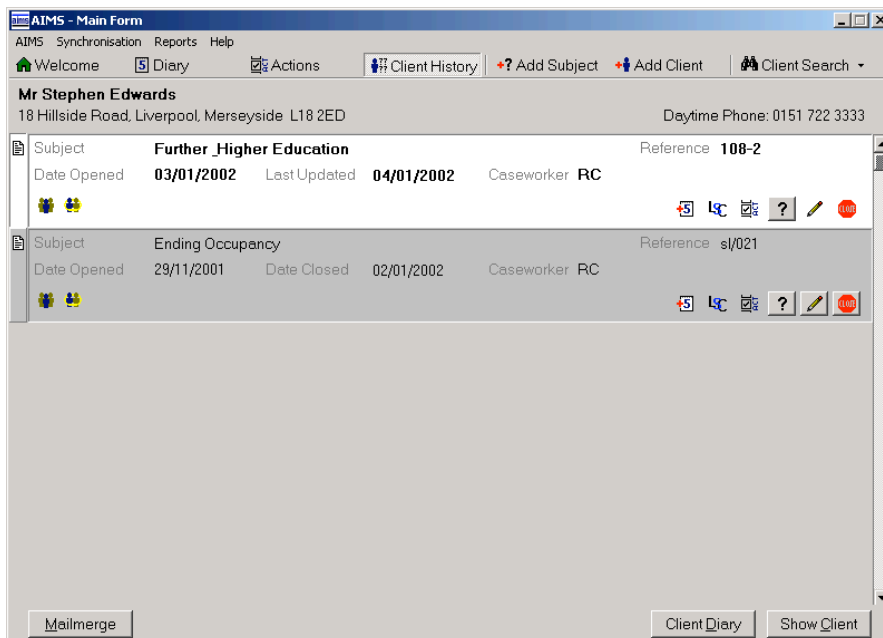
This function is only available in AIMS Extra.

### What is a Third Party?

Within AIMS it is possible to capture the details of additional people or organisations that are associated with a particular subject or matter that you are working on with a client. All Third Party linkages are made with an individual subject and can be used for creating mail merge letters connected with that subject. An example of someone you might want to link might be the client's social worker, solicitor or carer. It is possible to link more than one Third Party to any subject.

### How to Link a Third Party

To link a third party to a client's subject, you must be in the Client History screen of that client.



### Opening the Linked Third Party Form

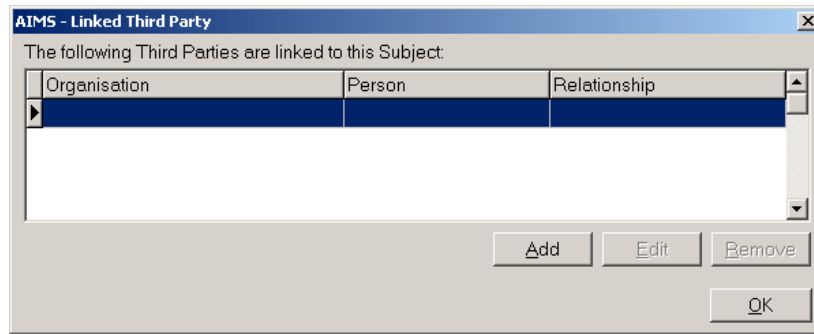
1. In the Client History screen select the Subject Header of the subject you want to link a Third Party to.



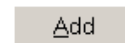
2. Identify the Third Party button and click with the mouse.



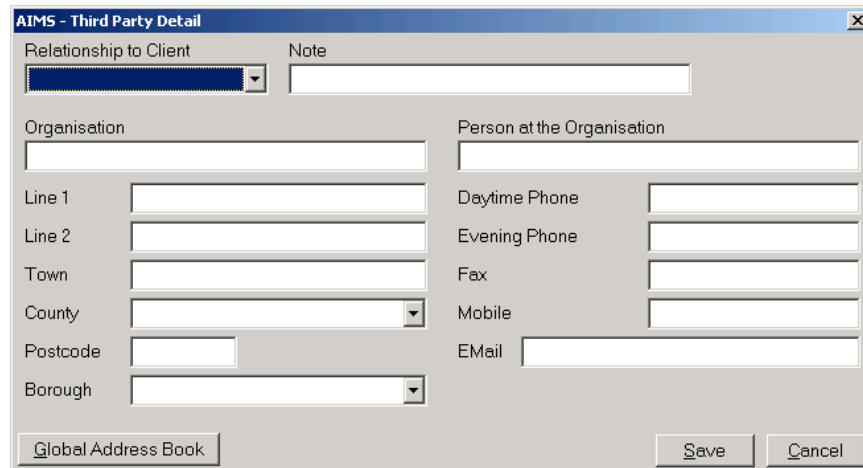
- This will open the Linked Third Party form.



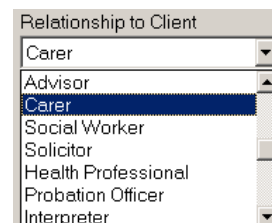
### Adding a Linked Third Party



- On the Linked Third Party form, click the Add button. This will open the Third Party Detail Form.



- Every Third Party must have their relationship with the client entered. Click the arrow to the right of the 'Relationship to Client' field and select the appropriate choice.



**Note**

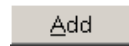
The 'Relationship to Client' field is a coded field whose options can be configured by your system administrator. For instructions on how to configure the 'Relationship to Client' field, please see [How to Edit an Existing Code List](#) in the configuration section of this help guide.

- The other information that you wish to record about your Third Party should be entered into the various fields as required and the information then saved. The address information will then be available for mail merging. For more information please see the section of the Help Guide, '[Merging Address details into a Merge Document](#)'.

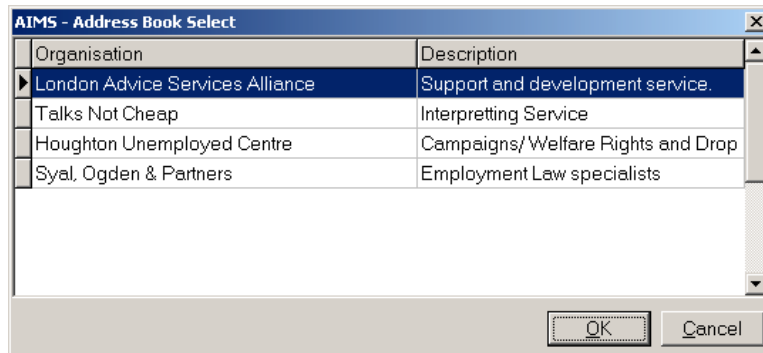
## Using the Global Address Book to add a Linked Third Party

The Global Address Book is a contact database within AIMS that holds the details of people or organisations that your organisation regularly uses. The information within the GAB is available to all users and can be used to fill in some of the details in the Third Party Detail form. For more information on the GAB please see the section '[The Global Address Book](#)'.

1. From the Linked Third Party form, click the 'Add' button. This will open the Third Party Detail form.



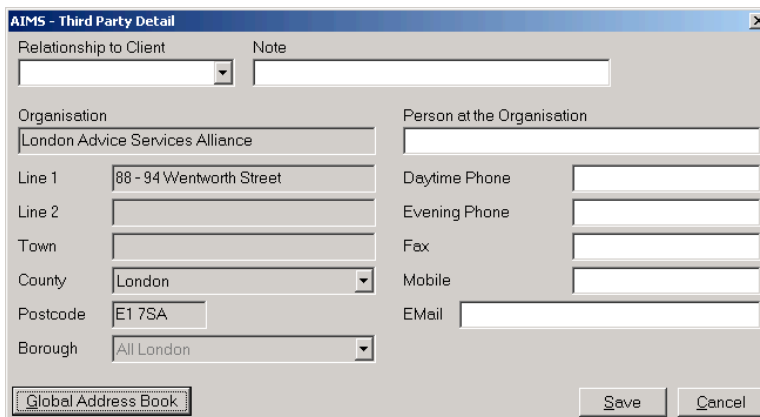
2. Click the 'Global Address Book' button on the Third Party Detail form. This will open the 'Address Book Select' form where the name and description of the contacts in the Global Address Book are displayed.



Organisation	Description
London Advice Services Alliance	Support and development service.
Talks Not Cheap	Interpreting Service
Houghton Unemployed Centre	Campaigns/ Welfare Rights and Drop
Syal, Ogden & Partners	Employment Law specialists

OK Cancel

3. Highlight the contact whose details you want to enter as a linked third party and click the 'OK' button. The address information will be automatically entered into the Third Party Detail form.



Relationship to Client: [dropdown] Note: [text field]

Organisation: London Advice Services Alliance

Person at the Organisation: [text field]

Line 1: 88 - 94 Wentworth Street

Line 2: [text field]

Town: [text field]

County: London

Postcode: E1 7SA

Borough: All London

Daytime Phone: [text field]

Evening Phone: [text field]

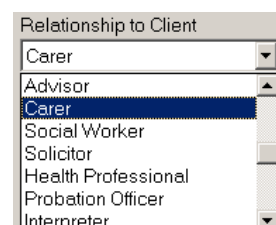
Fax: [text field]

Mobile: [text field]

E-Mail: [text field]

Global Address Book Save Cancel

4. Every Third Party must have their relationship with the client entered. Click the arrow to the right of the 'Relationship to Client' field and select the appropriate choice.



Relationship to Client

- Carer
- Advisor
- Carer
- Social Worker
- Solicitor
- Health Professional
- Probation Officer
- Interpreter

## Note

The 'Relationship to Client' field is a coded field whose options can be configured by your system administrator. For instructions on how to configure the 'Relationship to Client' field please see [How to Edit an Existing Code List](#) in the configuration section of the Help Guide.

5. The other information that you wish to record about your Third Party should be entered into the various fields as required and the information then saved. The address information will then be available for mail merging. For more information please see the section of the Help Guide, '[Merging Address details into a Merge Document](#)'.

This function is only available in AIMS Extra.

### What is a Linked Client?

Where two or more people come to the agency together about a shared problem, this feature allows you to link them to the same subject. Clients are only linked through the shared Subject. Any other matters they have will remain confidential and can only be viewed through their respective Client History screens. When running reports on a subject where there are linked clients, AIMS reports that one subject helped however many people are linked to the subject.

For example, Mr and Mrs K come about their housing problem. Using the Linked Client function, you can enter both sets of Client Details and then 'link' the subject. AIMS reports on one housing matter that has helped two people.

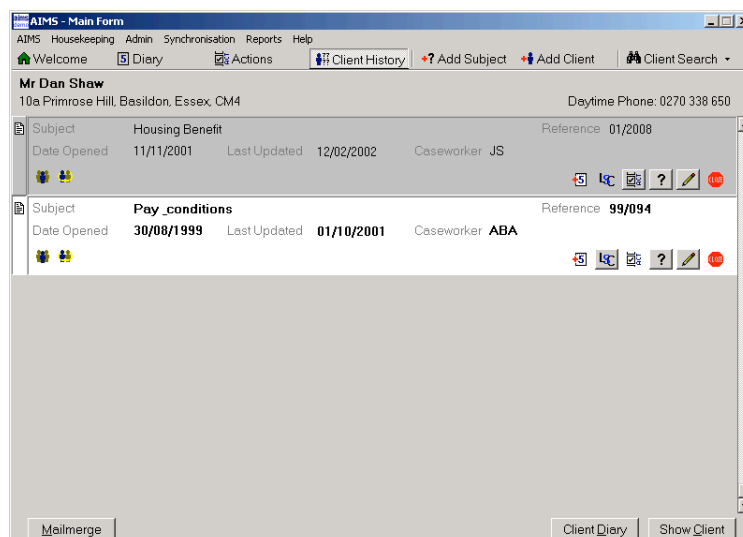
### Note

If Linked Clients are given a financial outcome any report that includes client information will count this money twice, once against each linked client. If the layout only reports using subject information then no multiplier effect will occur.

### How to Create a Linked Client

To create a link between two or more clients, you must be in the Client History screen of the client where you have created the original subject that you want to share.


1. The linking process described below assumes that the Client Details of the clients who you wish to link have already been entered into AIMS. Enter their details now.
2. Go to the Client History Screen of the client with the problem you want to share. If the details of the Subject have not already been entered into AIMS do so now.

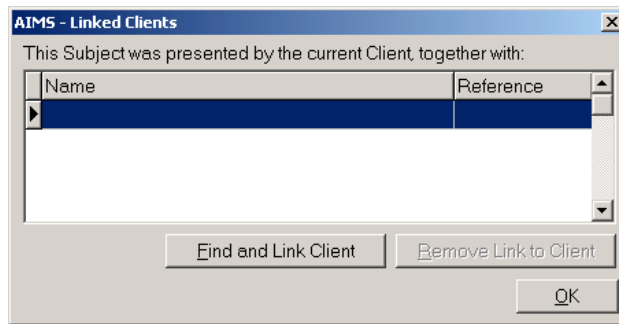


3. In the CHS select the Subject Header of the subject that you want to share so that it becomes highlighted (white).

Subject	<b>Pay_conditions</b>	Reference	<b>99/094</b>
Date Opened	<b>30/08/1999</b>	Last Updated	<b>01/10/2001</b>
	Caseworker	<b>ABA</b>	

4. Identify the Linked Client button and click with the mouse. This will open the 'AIMS – Linked Client' form which shows any clients that are linked to this subject. 

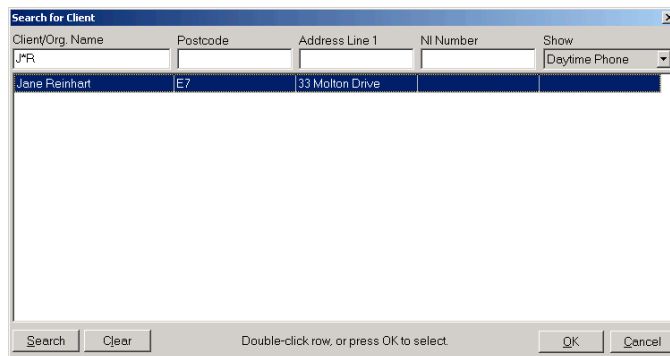


AIMS - Linked Clients

This Subject was presented by the current Client, together with:

Name	Reference

5. To add the client that you wish to link to this subject, click the 'Find and Link Client' button. This will open the 'Search for Client' screen where you can search for the client that you wish to link.

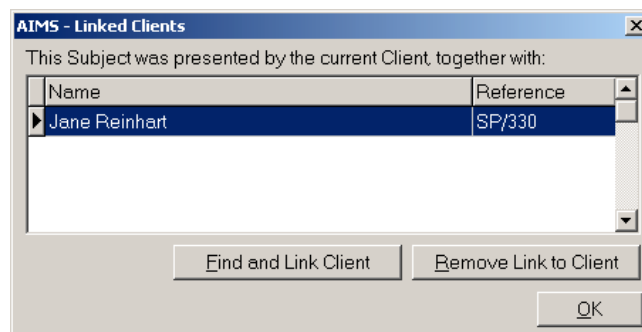


Search for Client

Client/Org. Name	Postcode	Address Line 1	NI Number	Show
J*R				Daytime Phone
Jane Reinhart	E7	33 Molton Drive		

Double-click row, or press OK to select.

6. Once you have identified the correct client, highlight the selection and click the 'OK' button. This will return you to the 'AIMS – Linked Clients' form where their name and reference is displayed.



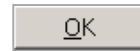
AIMS - Linked Clients

This Subject was presented by the current Client, together with:

Name	Reference
Jane Reinhart	SP/330

7. From this form you can add more linked clients to the subject if required.


- Click the 'OK' button when you have finished linking clients.

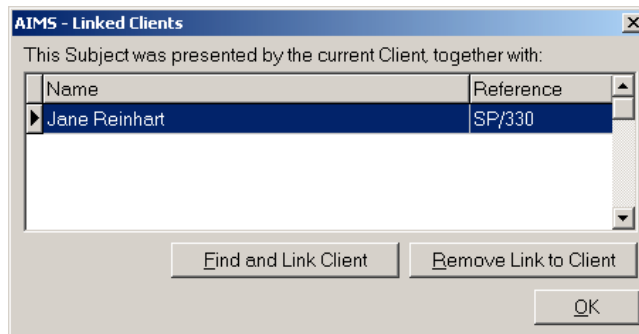




You will notice that the 'Linked Client' button on the Subject Header is now slightly raised. This is to show that the subject is linked to another client.

### Removing a Linked Client

If you need to remove a linked client from a subject, you must be in the Client History Screen of the client who is going to keep the subject once the link is removed.

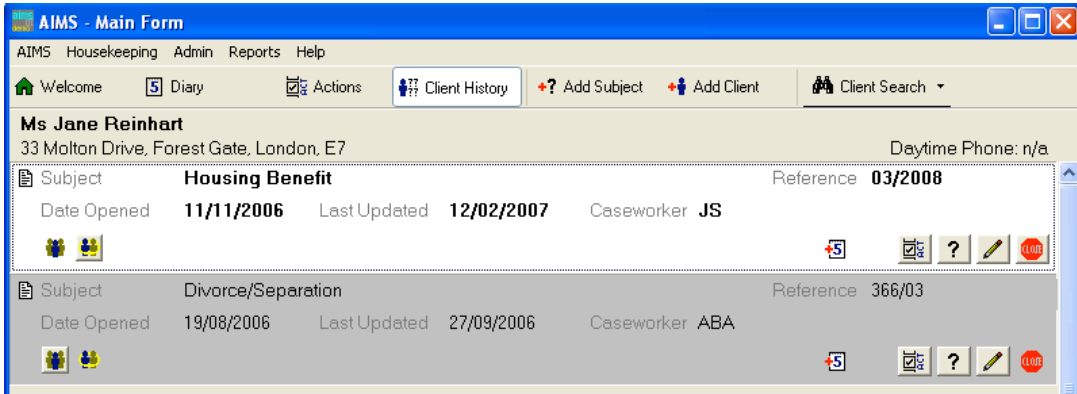
- Go to the Client History Screen of the client who is going to keep the subject.
- Select the Subject Header of the subject that is linked.
- Click the 'Linked Client' button. This will open the 'AIMS – Linked Client' form. 
- Highlight the Client that you want to unlink from the subject.



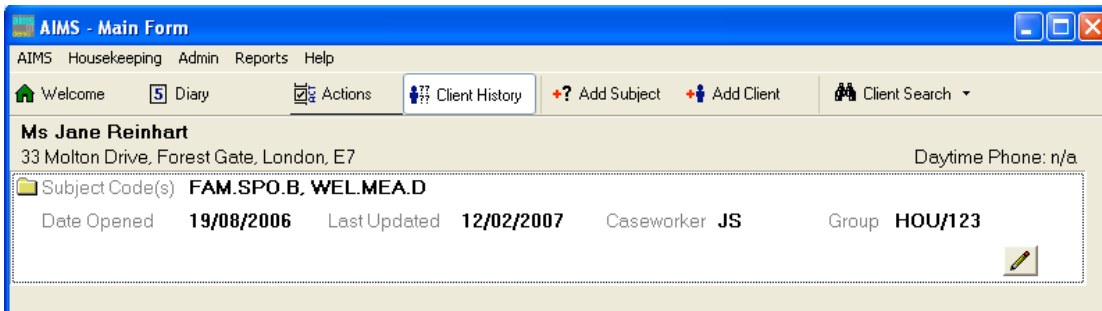
- Click the 'Remove Link to Client' button. As this will immediately remove the link and there is no way to undo this action, please check carefully that you have selected the correct Linked Client before removing them. 
- Click the 'OK' button to return to the Client History Screen. If you have removed the last link to this subject you will notice that the 'Linked Client' button is no longer raised. 

### The Subject in AIMS

Different agencies use different methods for collecting and describing the work they do. In AIMS the term Subject refers to the subject matter or issue raised by the client that caused them to come for advice or seek information. In the example below the client has two subjects open in the Client History screen.



Each subject within the Client History screen represents a specific problem you are dealing with on behalf of the client. Some agencies may treat each aspect of the client's problem as a separate enquiry and want to record a number of different subjects in the Client History screen. Others may feel the problems are essentially elements of a larger issue and want to group these problems together so that the total amount of work undertaken on each constituent problem is added together. AIMS facilitates the collection of data using either approach or a mixture of both through a facility called 'Grouping'.



### Grouping


If you enter all the constituent elements that comprise the client's problem (your agency may call this a Case or Matter) as individual subjects in AIMS, you can then 'Group' the subjects as belonging to each other.

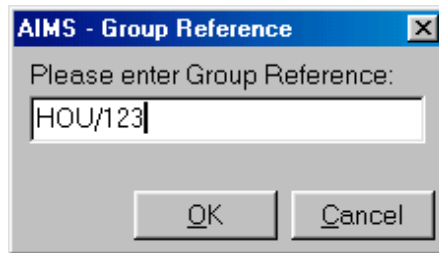
In the example above the two separate subjects from the top screen have been grouped into a single housing case 'HOU/123'.

All work done on the two individual subjects that make up the group will be linked to each particular subject but will also be recorded against the group.

### How to create a Group



1. Right-click the mouse on the file symbol at the top left of the Subject Header of the subject you wish to group.
2. A box will open asking you if you want to add the  subject to a new group.
3. Click Ok and then fill in the group reference name in the dialogue box.



4. Having given the first subject in the group a name you can now right click on the other subjects you want to add to that group and a new dialogue box will open. Chose the option which suits your needs.



## Notes

A subject can only belong to one group at a time. You can remove subjects from a group at any time and all the work associated with that subject will be taken with it.


The subjects within a group can start and finish at different times and can have different outcomes.

Group References must be unique for any one client but can be re-used elsewhere in the system.

## Expanding or Renaming a Group

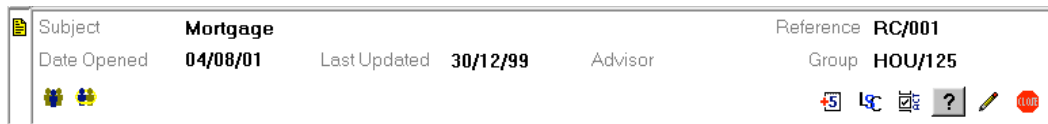
Once you have created a Group it is displayed in the Client History screen as a Group Header. This header has a Group Reference, the Subject Codes of the subjects that compose the group and to the left of the header, a folder symbol.




1. To expand or rename a group, right-click the mouse on the folder symbol  at the top left of the Group Header.
2. A box will open asking you whether you wish to Expand or Rename the group. Select the required option.
3. If you have selected to Expand the group, the subjects that comprise the group will appear as Subject Headers in the Client History screen.

### Notes

A Subject Header that is part of a group will have a yellow file symbol to the left of the header and will also have a group reference displayed.



You can Expand a group by double-clicking with the mouse on the folder symbol at the top left of the group.

You can Collapse a group by double-clicking on the yellow file symbol at  the top left of the Subject Header of a subject in an expanded group.

When you leave the Client History screen all expanded groups are automatically collapsed.

## Removing a Subject from a Group

1. To remove a subject from a group, right-click on the yellow file symbol at the top left of the Subject Header in an expanded group.
2. A box will open asking you whether you wish to Remove, Collapse or Rename the group. Select the required option.

### Notes

When a subject is removed from a group, the Work Done on that subject remains with that subject.

This section of the guide describes how to set up AIMS so that pre-defined mail merge documents can then be created using Microsoft Word. Each version of Word processes the mail merge function in slightly different ways and you will need to be familiar with how your version works..

**It is not possible to use AIMS with other word processing packages.**

The mail merge documents will need to be created by someone who is an advanced Microsoft Word user with experience of creating mail merge documents.

### **Note**

**Mail Merge can only be configured by users with Administrative access to AIMS.**

**The process described here will work for both Access and SQL users of the database.**


### **Creating a Template directory for the mail merge templates**

When mail merge is used within AIMS a pre-defined mail merge document is selected as a template and the merge fields within the document are populated with the data selected from within AIMS. These pre-defined templates can be stored in the default directory called "Templates" created by AIMS or any other location selected by the person creating the merge document.

If you are working on a network you will need the correct network access rights before you can create the templates directory.

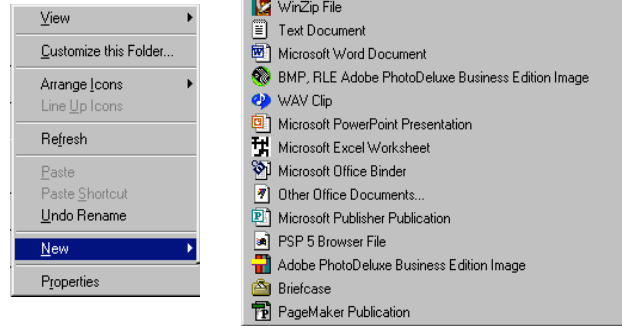
### **Note**

When AIMS is installed a Templates directory is automatically formed at 'c:\program files\aims\templates' or an equivalent sub-folder for network versions. There is no need to do the following procedure if the directory already exists.

1. First open Windows Explorer. There are a number of ways of opening Windows Explorer – an easy way is to right click on the Start button on the Taskbar and select Explore. Navigate to the drive on which AIMS has been created. In the case of a network the drive will probably be on a shared drive on the network server.
2. Once you have located the correct drive, in the left pane of Windows Explorer select the AIMS directory in the directory tree. When you click the directory the current directory structure will look as in the image to the right.  


hand  
AIMS
3. Left click with the mouse the AIMS folder in the above image. The contents of the AIMS directory will be shown in the right-hand pane of Windows Explorer.

4. In the right-hand pane, right click the mouse in an empty area of screen and a grey selection box will appear. Near the bottom of this box you will see the entry 'New'.



5. Click 'New' and another selection box will open. At the top of this box is the entry 'Folder'.

6. Click 'Folder' and a new folder will appear in the directory tree entitled 'New Folder'.



7. Using the mouse, click 'New Folder' in the left-hand pane and a grey selection box will open. Click the entry 'Rename'. The text 'New Folder' will be selected and can then be overwritten.

8. Type in the name 'Templates' and then click enter. The directory structure should look like this.




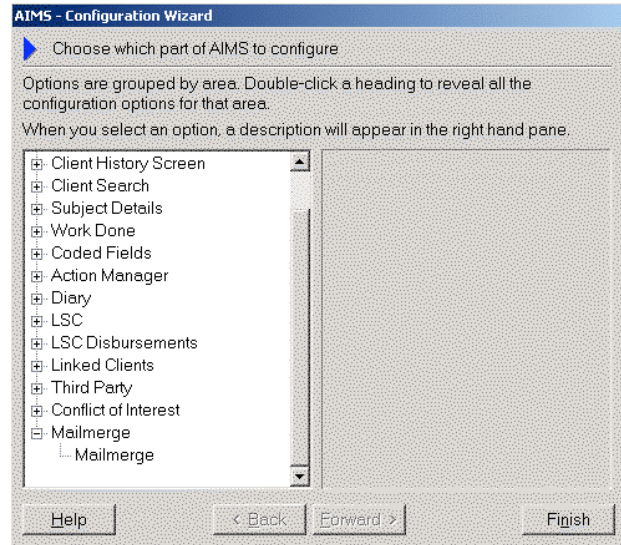
9. Close Windows Explorer and then open AIMS. Log on as a user with administrative rights.


## Configuring the Mail Merge options within AIMS

Now that you have created the 'Templates' directory the next stage is to configure AIMS to use mail merge templates.

## Defining the Mail Merge Template Directory

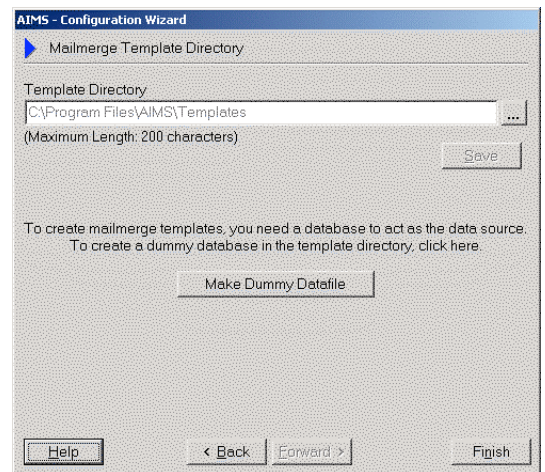
1. Select 'Admin' from the top menu bar.
2. The select 'Configuration Wizard'. The wizard will then open.
3. In the left-hand pane select 'Mailmerge' and double click it or click the  sign to its left. Below the function there will now appear another line titled 'Mailmerge'. Select this second 'Mailmerge' entry.



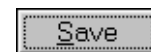
4. Once selected, click the 'Forward' button. The Mailmerge Template Directory window will then open.
5. AIMS needs to know where the mail merge templates will be kept. This is in the directory that we created earlier. Click the  button.

A dialogue box will open asking you to select the 'Templates' directory.

6. Navigate to where you created the 'Templates' directory and select it. Then click 'OK'. You will see that the selected directory appears in the 'Template Directory' field.



7. You must now click the 'Save' button. This will ensure that when AIMS needs to access a mail merge document, it will know where to look.



## Creating a Dummy Datafile

Having defined the Template directory, you must now create a copy of the database that you are currently using. This is known as a 'Dummy Datafile'. Ideally, this should be done after all other configuration changes have been made to the AIMS database.

### Note

In order to create a mail merge template document, you need to have a database selected in order to first place the merge fields in the mail merge documents.

If you make changes to your configuration after you have defined your dummy datafile these new or altered fields will not be available within the old dummy datafile.

A mail merge document based on the old dummy datafile will not work properly unless an up-to-date copy of the AIMS database is created and the existing mail merge document is re-defined using this new dummy database.

1. To create a dummy datafile, click the 'Make Dummy Datafile' button. The dummy datafile is created in the 'Templates' directory and is named merge.dat.



2. If you have altered your configuration of AIMS and wish to create a new dummy datafile, click the 'Make Dummy Datafile' button again. This will automatically overwrite the previous version.

## Procedures for creating a Mail Merge document in Microsoft Word

Having created a directory for your mail merge templates and having then configured AIMS to use mail merge templates you are now ready to create mail merge source documents.

Mail merge documents are created within Microsoft Word **not** AIMS. In order to help identify which field in AIMS a mail merge field in Microsoft Word refers to you may find it useful to have AIMS open while you are creating your mail merge document.

The following procedures explain how to use Mail Merge within Microsoft Word to create a mail merge source document. As there are differences between the way in which different versions of Word manage the merge process, this section has been split into two – the first part deals with Word 6.0 – 2000 and the second Word 2002(XP) and 2003.

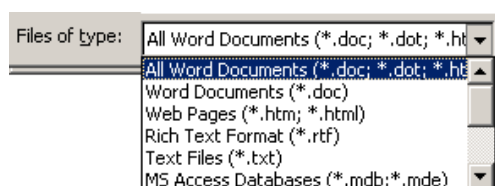
### Note

You will only be able to use Mail Merge within Word if your version of Word was originally installed with the mail merge options enabled.

## Mail merging with Word 6.0, 97 and 2000

1. Open Microsoft Word.
2. Open the Word document to which you wish to add mail merge fields. This can either be a completely blank document or a letter that you have previously prepared/used and into which you now want to add merge fields such as the Client Name or Address.
3. Select 'Mail Merge ...' from the Tools menu. This will open the 'Mail Merge Helper'. Click 'Create', select 'Form Letters' and then select 'Active Window'.
4. At stage 2 'Data Source', click 'Get data' and select the option 'Open Data Source' from the drop down menu. The database source that you select must be the Dummy Datafile that you created earlier in the 'Templates' directory.
5. Navigate to the 'Templates' directory that you created earlier.

6. To see the Dummy Datafile you need alter the 'Files of type:' field in the 'Open Data Source' window so that it displays 'All files'. Once selected this will reveal the 'Merge.dat' file.



to

7. Select this file and press 'Open'.
8. You may get the following message "Word could not merge the main document with the data source because the data records were empty or no data record matched your query options". This message appears because the Dummy Datafile does not contain any client records. Click 'OK'. If you do not get this message, proceed to step 9.
9. If you are creating a new mail merge document another message will now appear "Word found no merge fields in your main document. Choose the Edit Main Document button to insert merge fields into your main document." Click 'Edit Main document'.
10. You are now ready to insert mail merge fields.
11. You can add merge fields from various parts of the AIMS database by clicking the 'Insert Merge Field' button on the mail merge toolbar. You will see a long list of all the field names in the AIMS database including:
  - Client Details fields: all fields including any User Defined Fields created in the Client Details window (for how to insert Address details please see below).
  - Subject Details fields: all fields including and User Defined Fields created in the Subject Details window.
  - Work Done fields: the most recent Case Note written in the work details can be selected as a merge field.
  - Outcomes: the Outcome Notes field is available.
  - Linked Third Parties: it is possible to merge the name and address details of any linked third party into a document.

- Diary: there are merge fields for the Last Diary Appointment and the Next Diary Appointment.
12. Once you have added the merge fields you require, save the document into the Templates folder and give it a meaningful name e.g. 'Client appointment letter.doc'
  13. Having created your merge document you can now return to the AIMS database.

### **Mail merging with Word 2002(XP) and 2003**

1. Open Microsoft Word.
2. Open the Word document to which you wish to add mail merge fields. This can either be a completely blank document or a letter that you have previously prepared/used and into which you now want to add merge fields such as the Client Name or Address.
3. Under 'Select 'Letters and Mailings' from the Tools menu then 'Mail Merge...'. This will open a wizard in the right hand side pane.
4. Under 'Select document type' – choose the type of document you wish to create, in this instance 'Letters' then click the blue text at the bottom of the pane 'Next: Starting document'
5. Under 'Select starting document' – choose 'Use the current document', then click the blue text at the bottom of the pane 'Next: Select recipients'
6. Select recipients – click 'Use an existing list'. The database source that you select must be the Dummy Datafile that you created earlier in the 'Templates' directory.
7. Click Browse and in the Select Data Source window navigate to the 'Templates' directory that you created earlier and select All Files (\*.\*) in the Files of type box. Select Merge.dat and click 'Open'. A Mail Merge Recipients window will open which displays the AIMS field names. Click 'OK' then click the text at the bottom of the pane 'Next: Write your letter'
8. At this point, if you haven't written your letter, do so. You can add merge fields from various parts of the AIMS database by clicking 'More items...' . You will see a long list of all the field names in the AIMS database including:
  - Client Details fields: all fields including any User Defined Fields created in the Client Details window (for how to insert Address details please see below).  
  
N.b. If you want to send Courtesy Copies make sure you select the "Courtesy Copy" field and also use the "Addressee Name" and "Addressee Address" fields when constructing the template letter.
  - Subject Details fields: all fields including and User Defined Fields created in the Subject Details window.
  - Work Done fields: the most recent Case Note written in the work details can be selected as a merge field.

- Outcomes: the Outcome Notes field is available.
- Linked Third Parties: it is possible to merge the name and address details of any linked third party into a document.
- Diary: there are merge fields for the Last Diary Appointment and the Next Diary Appointment.

9. Select the fields and click 'Insert'. Click 'Close' once you have selected all the fields you require.

10. Now save the document into the Templates folder and close the document.

11. Having created your merge document you can now return to the AIMS database.

## Notes


Merge fields in a merge document can only refer to the Client and Subject details selected at the point of merging within AIMS. This means that you cannot refer to more than one client or subject in a merge document.

If you chose to merge date fields into a mail merge document these will be imported in the format '21/09/2001 12:00:00 AM'. To change the format you will need to apply a 'General Switch' to the merge field in the merge document. Details of General Switches can be found in Microsoft Word help.

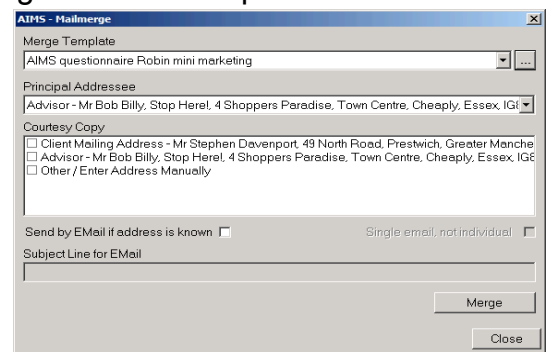
## AIMS Mail Merge Example - Merging Address details into a Merge Document

The merging of address details is done in two stages in AIMS. The address fields are placed in your merge document in the merge field positions selected when creating the mail merge source document in Word.

1. Search for client and click  in the bottom left hand corner.

2. Select the merge template by clicking  and navigate to the Templates folder. Select your merge document and click 'Open'.

3. From this window you are able to select the addresses you want to use in your merge document. In the example (right) you can choose to write to the client, or one of the 3<sup>rd</sup> parties. One is the principle addressee and the others can be sent courtesy copies of the principles letter.



4. It is also possible that the subject on which the mail merge document is based has a Linked Third Party or Linked Client Address that is available for mail merge. If so, this

also is selected from the 'AIMS – Mailmerge' window. For Linked Third Parties and Linked Clients the letter would need to have been written appropriately and may need editing before it can be sent.

5. If required you can create a 'Courtesy Copy' (CC) letter. Check the box next to the address which you want the copy to be sent to.

TIP > Ensure you have created the template letter correctly by including the "Courtesy Copy", "Addressee Name" and "Addressee Address" fields when constructing the template letter.

6. Click 'Merge'. A Word document will be created which can now be edited if necessary, saved, printed and so on. Remember that any editing you do will not be saved to the template.
7. By ticking the "Send by Email if address know" tick box, AIMS will create an email putting the body text into the email and placing it in the Draft folder in Outlook.

### User Permissions

There are three levels of access that a user may have to the reports module within AIMS.

- Users who can only run reports that have been previously created within AIMS. This is the minimum level of access and is available to any user.
- Users who are 'Able to add, edit, and delete reports' as well as run existing reports. This level of access is selected by choosing the permission 'Report Edit' (Able to add, edit, and delete reports') in the [Managing Users / User Detail Screen](#).
- Users who are 'Able to add, edit and delete report *layouts*' as well as run existing reports. This level of access is selected by choosing the permission 'Layout Edit' ('Able to add, edit, and delete report layouts') in the [Managing Users / User Detail Screen](#).

### Note

All users who are 'Administrators' have full access to all areas of the reports module automatically.

All 'enabled' users are allowed to run reports that have been created within AIMS.

### Who should read this section

This section of the guide explains how to run previously created reports.

If you want to know how to apply report layouts to create or modify reports, please read the section [Adding Editing, Copying and Deleting Reports](#). If you want to know how to create or modify report layouts, please read the section [Using the Report Layout Wizard](#).

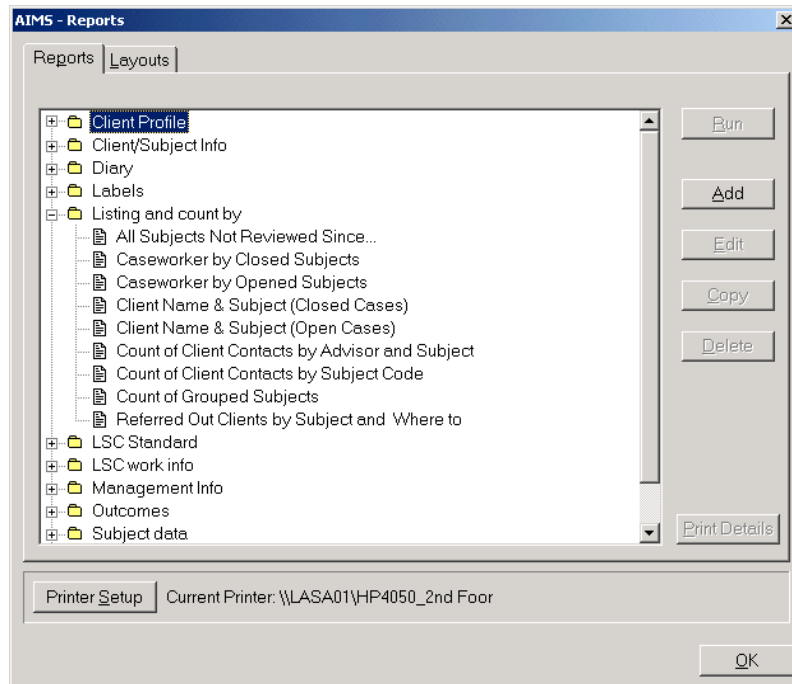
### Opening the Report Module



1. From the Menu Bar select "Reports" and then from the drop down list that appears, select "Reports". A display like the one below will appear.

### Note

- The screens displayed in this section of the guide assume that you do not have any user 'permissions' allowing you to see additional features of the Reports module.

- If you are opening the 'Reports' module for the first time there will only be the 'AIMS Standard' directory displayed within the reports window.



2. In the image above the reports window displays the report directories created within AIMS in the form of a tree directory. By clicking on the  sign to the left of the report directory you can view any reports that have been previously created and placed in that directory. The tree directory can be expanded to include one further sub-directory. The AIMS "Listing and Count by" directory has been expanded and now displays a  against the directory name.
3. Check that there is a printer selected in the 'Printer Setup' details. If no printer is currently selected click 'Printer Setup' button and select a printer.



**Note**

The 'Printer Setup' details are based on your default Windows settings. The Quick Reports module uses these settings to generate the report. If no printer is selected the report module will not work.

## Running a Report

1. Expand the directories in the Reports window until you can see the report that you wish to run.
2. The report can be run in two ways:
  - i) Double clicking on the required report using the mouse.
  - ii) Highlighting the report and clicking the 'Run' button.

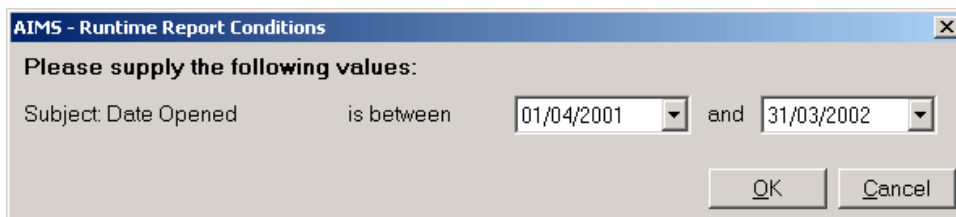


### Note

There are also keyboard alternatives for the above. A report can be highlighted using the 'Tab' and 'Arrow' keys and it can be run using the 'ALT + R' keys.

## 'Runtime' Conditions

Some reports are created using 'Runtime' conditions. If a report has a runtime condition, this means that each time the report is run, the user will be asked to make some kind of choice before running the report.

A dialog box titled "AIMS - Runtime Report Conditions" with a close button (X) in the top right corner. The text inside reads "Please supply the following values:". Below this, there is a label "Subject: Date Opened" followed by "is between". To the right of "is between" are two date input fields. The first field contains "01/04/2001" and the second field contains "31/03/2002". Between the two date fields is the word "and". At the bottom right of the dialog box are two buttons: "OK" and "Cancel".

3. In the above Runtime Report Condition form, the user is asked to fill in a range of dates. These define a condition for the report such that the report will only report data about subjects that were opened between the 1/4/2001 and 31/3/2002.

### Note

A report can have more than one runtime condition.

4. Once you have selected the appropriate values for the runtime condition, click the 'OK' button.



The chosen report will now appear on screen in a 'Print Preview' window displaying the data associated with the report.

## The Print Preview Screen

While viewing a report in the print preview screen it is possible to undertake several different actions. These are accessed using the menu at the top of the Print Preview screen.






Each of the icons in the menu bar has a 'Tool Tip'. If you move the mouse over the icon, a message will appear on the screen telling you the function of the icon.

## The Different Views



1. Click each icon to display a different view of the report.

- i. 'Zoom to fit' – this displays the whole page in the available window space 
- ii. '100%' – this displays the page at the same scale as it would print out 
- iii. "Zoom to width" – this displays the full width of the page in the available window 

## Moving through a report



1. When a report has more than one page, these icons allow you to move through the report. From left to right they are: First page, Previous page, Next page, Last page.

## Printing a Report

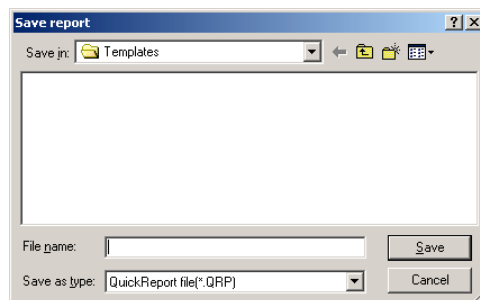


1. The left hand icon allows you to change the printer, the printer properties, the print range and the number of copies.
2. The right hand icon sends the report straight to the printer without allowing you to make any changes in your printing requirements.

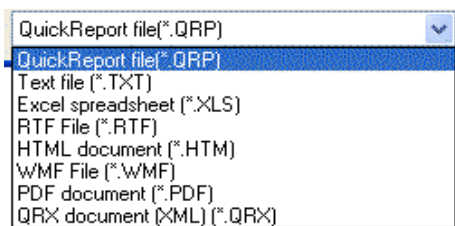
## Saving and Exporting a Report



1. Clicking this icon opens a window 'Save reports'. This box is similar in layout and operation to similar Windows screens.



2. It is possible at this stage to save the currently displayed on your screen in a variety of formats. If you select the field 'Save as type:' you will see the options that are available. A brief description of what each format can be used for is given below.



report that is a variety of formats. will see the options what each format

Quick Report file (*.QRP)	Quick Reports is the name of the module used within AIMS to generate the reports. If a report is saved in Quick report format then it can only be viewed within AIMS. See below <a href="#">Opening a Previously Saved Report</a> for further details.
Comma Separated (*.CSV)	This is a standard file format that can be opened by most spreadsheet and word processing programs. Each item of information is contained in rows in the file separated by commas. Any formatting is lost.
HTML document (*.HTM)	This saves the report in HTML which means that the report can be displayed in a web browser. Due to the way in which the formatting is transferred the report may need editing before it can be displayed.
WMF File (*.WMF)	This saves the report as a Windows Metafile. This is a form of graphic. The information in the report cannot be altered in a metafile. This format can be used to drop copies of reports into word, excel or outlook.
RTF (*.RTF)	Rich Text Format is a standard file format that can be read by most word processing programs. When opened, the information appears as presented in the report and can be easily edited.
Excel spreadsheet (*.XLS)	This saves the report as an Excel spreadsheet. Each item of data is presented in a separate cell and can easily be edited or used in another report.
Text file (*.TXT)	This saves the report as ASCII text. The file can be opened by any program but, as the information in the report is separated only by spaces and has no formatting, it may require considerable editing.
Portable Document Format (*.PDF)	PDF is a universal file format that preserves the fonts, images, graphics, and layout of any source document, regardless of the application and platform used to create it.

3. Once you have selected the format in which you want to save your report, report a name and select where you want to save it.



give your

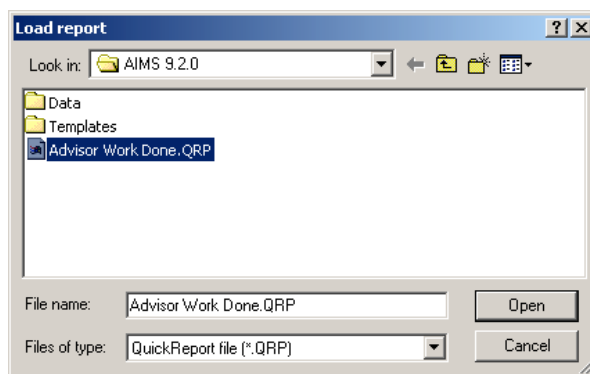
4. Click the 'Save' button when you are satisfied with your choices. This will take you back to the Print Preview screen.

### Opening a Previously Saved Report

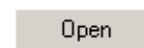


If you have previously saved a report in Quick Report Format (see [Saving and Exporting a Report](#) above) it is possible to load that report and display it in the Print Preview window. (N.B. To gain access to the Load Report icon you will need to have run a report, and not closed that report window).

1. Clicking this icon opens a window 'Load report'.



2. Navigate to where you have saved the previously saved report and highlight it so that it appears in the 'File name:' field.
3. Click the 'Open' button. The saved report will be displayed in the Print window.



Preview

### Closing the Print Preview Window

1. To close the Print Preview window, click the 'Close' button on the menu. This will return you to the Reports window.



will return you

### User Permissions

There are three levels of access that a user may have to the reports module within AIMS.

- Users who can only run reports that have been previously created within AIMS. This is the minimum level of access and is available to any user.
- Users who are 'Able to add, edit, and delete reports' as well as run existing reports. This level of access is selected by choosing the permission 'Able to add, edit, and delete reports' in the [Managing Users / User Detail Screen](#).
- Users who are 'Able to add, edit and delete report layouts' as well as run existing reports. This level of access is selected by choosing the permission 'Able to add, edit, and delete report layouts' in the [Managing Users / User Detail Screen](#).

#### Note

All users who are 'Administrators' have full access to all areas of the reports module automatically.

To use this section of AIMS you will need to have 'Report Edit', or 'Administrator' enabled in your user permissions.

### Who should read this section

This section of the guide explains how to work within the Reports module to create new reports or to edit, copy or delete previously created reports.



If you want to know how to create or modify report layouts, please read the chapter '[Using the Report Layout Wizard](#)'. If you want to know how to run reports, please go to the section '[Running Previously Created Reports](#)'.

## Opening the Report Module

1. From the Menu Bar select “Reports” and then from the drop down list that appears, select “Reports”. A display like the one below will appear.

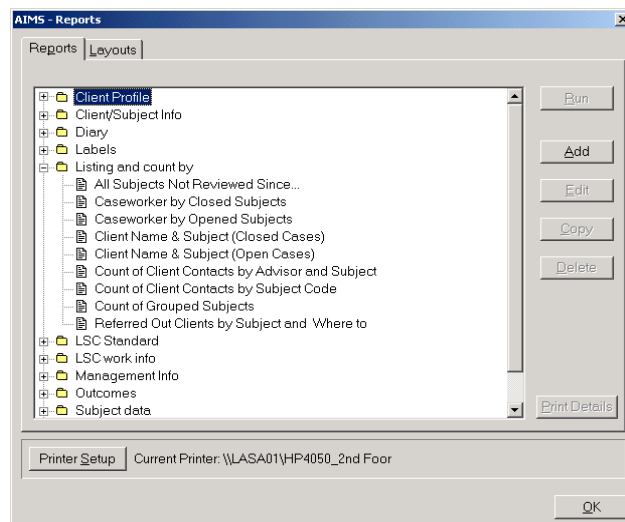
### Note

If you are opening the ‘Reports’ module for the first time there will only be the ‘AIMS Standard’ directory displayed within the reports window.

2. In the image below, the reports window displays the report directories created within AIMS in the form of a tree directory. By clicking on the  sign to the left of the report directory you can view any reports that have been previously created and placed in that directory. The AIMS “Listing and Count by” directory has been expanded and now displays a  against the directory name.

### Note

- The screens displayed in this section of the guide assume that you have user permissions allowing you to ‘Add, edit, and delete reports’ but not the user permission ‘Able to add, edit, and delete report layouts’.
- The AIMS Standard directory is where reports that have been created by the AIMS team and which are distributed with AIMS are kept.



3. Check that there is a printer selected in the ‘Printer Setup’ details. printer is currently selected click ‘Printer Setup’ button and select a printer.



If no

### Note

The ‘Printer Setup’ details are based on your default Windows settings. The Quick Reports module uses these settings to generate the report. If no printer is selected the report module will not work.

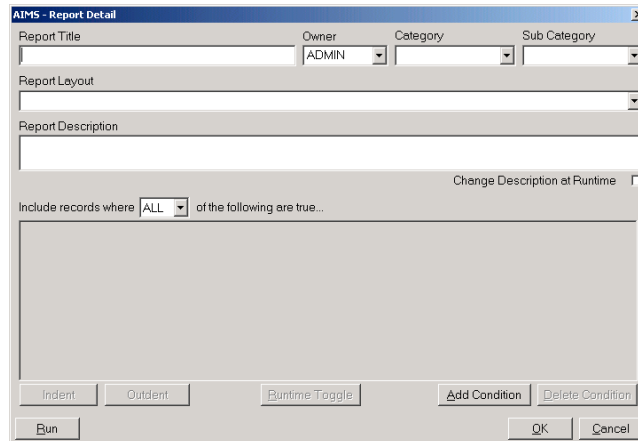
## Using the Report Module

How to run a Report is described in the section [‘Running Previously Created Reports’](#).

### Adding a Report

‘Adding a Report’ describes the process by which new reports are added in the Reports window.

1. Click the ‘Add’ button in the Reports window or alternatively use the keyboard alternative ‘Alt + A’. This will open an empty ‘AIMS – Report Detail’ window.



### Naming Reports

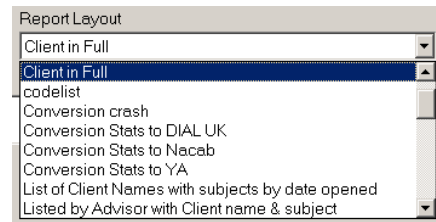
It is important that the titles of reports are thought through as the name a report is given is used by AIMS in several ways:

- a. For identification within AIMS each report must have a unique name.
  - b. The title of the report appears inside the finished report as a heading.
  - c. For identification by users the name must describe clearly what the report’s function is so that users who haven’t helped create the report will understand its function when they read the title.
2. When you have decided on a suitable title enter it in the field ‘Report Title’.

### Choosing a Report Layout

All reports are based on a report layout. Some of the layouts come with AIMS and some are created by your organisation. For details on how to create a report layout, please see the section [Using the Report Layout Wizard](#).

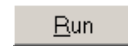
- In the 'Report Layout' field use the drop down menu to select the report layout on which you wish to base your new report.



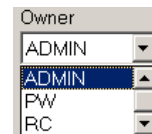
**Note**

If you are not sure of how a particular report layout will look, it is possible to run the layout from the 'AIMS – Report Detail' window. Select the report layout that you want to check in the 'Report Layout' field and then click the 'Run' button. The layout will be displayed in the Print Preview window. Closing the Print Preview window will return you to the 'AIMS – Report Detail' window where you can change your layout selection if you so require.

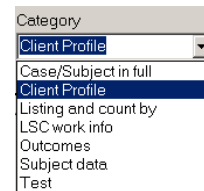
- Any information entered into the 'Report Description' field will appear at the top of the page under the Report Title. A report description is not compulsory but may be useful if you want to add more detail e.g. who the report was run for or a more detailed description of the report.



- Each report has an 'Owner', the person who has created the report or someone who should be asked before a report is altered in any way. Use the drop down list of AIMS users to select an owner for the report – the default selection is that of the logged on user.



- In the 'Category' field you can choose where the report will be stored. You can either select a choice from the drop down menu or create a new category by typing directly into the field. The different categories are used to generate the directory tree in the Reports window.



**Note**

There is no category 'AIMS Standard' despite there being such a directory in the 'Report' window. This is because the 'AIMS Standard' directory can only contain reports that are issued with AIMS.

## Report Conditions

Using conditions in a report allows you to decide what information is going to be displayed in the report. The exact effects of a particular condition may not appear as you intended and it is important that when using conditions you build them up slowly, using the 'Run' button to test the reports as you add each condition.

The screenshot shows the 'AIMS - Report Detail' dialog box. It has several sections: 'Report Title' and 'Report Layout' both set to 'Client in Full'; 'Report Description' is empty; 'Owner' is 'RC' and 'Category' is 'Client Profile'. Below this is a section 'Include records where ALL of the following are true...'. It contains a table with one row for condition 1. The first column of the table is a dropdown menu currently showing '< Select Field >', with a list of fields including 'Client: First Name(s)', 'Client: Gender', 'Client: Housing Status', 'Client: Impairment', 'Client: Language of First Choice', 'Client: Last Name', 'Client: Nee', and 'Client: NI Number'. The second column is a dropdown menu currently showing '< Select One >', with a list of operators including 'is equal to', 'is NOT equal to', 'starts with', 'does NOT start', 'contains', 'does NOT contain', 'matches', and 'is blank'. At the bottom of the dialog are buttons for 'Indent', 'Outdent', 'Runtime Toggle', 'Add Condition', 'Delete Condition', 'Run', 'OK', and 'Cancel'.

1. To add a condition to a report, click the 'Add Condition' button. The first, empty condition will appear showing two fields. One saying '<Select Field>', the other '<Select One>'.
2. In the field that says '<Select Field>', use the drop down box to select the field within AIMS that you wish to base your condition on.

### Note

What you choose here will depend upon the purpose of your report. Some examples of the fields you may choose and why are listed below but essentially what a condition is doing to a report is saying "Only show me information in the report where the following condition is true". A key point to bear in mind is that a condition does not have to be based on a field that is in the report e.g. a condition could be added to a report that shows subjects that have been closed in the past month, such that it would only show the results for a particular caseworker rather than the whole organisation.

## Some Useful Report Conditions:

Selected Field	Select One	Result
Subject: Date Closed	“is blank”	Only open cases.
Subject: Date Opened	“is between”	Shows results for all cases opened in a defined period.
Subject: Caseworker	“is equal to”	Show results that are linked to a particular caseworker.
Subject: Subject ID	“is equal to”	Shows results for a particular case or subject.
Client: Client ID	“is equal to”	Shows results for a particular client.

- When you have selected from the '<Select One>' field, another field will open where you should enter the value(s) that is (are) appropriate to the options you have chosen.
- To add another report condition, click the 'Add Condition' button and proceed as from 1. above.

## Runtime Toggle

Some reports are created using 'Runtime' conditions. If a report has a runtime condition, this means that each time the report is run, the user will be asked to make some kind of choice before running the report. Any condition can be made into a runtime condition.

- Select the condition that you have created that you wish to make a runtime condition by clicking the number button of that condition. In the example below the second condition has been selected.

- Clicking the 'Runtime Toggle' button will add the words '\*Runtime Condition\*' after the condition. (Should you need to remove an existing runtime condition's status, you can do so by selecting the condition by clicking on the number button on the left hand side, and then clicking the 'Runtime Toggle' button.)

- When the report is Run, the runtime conditions will appear in the 'Runtime Report Condition' form and the user will be asked to fill in a range of dates. In the example below, these define a condition for the report such that the report will only report on Work Done dated between the 1/4/2001 and 31/3/2002.

**Note**

A report can have as many runtime conditions as you require.

**ALL or ANY Conditions**

When you create the conditions for a report you can decide whether you want 'ALL' the conditions to apply or 'ANY' of the conditions to apply.

- The 'ALL' choice means that 'Condition 1' AND 'Condition 2' etc. must both be true for the information produced in the report. In the example below we would be asking to see information in the report where Time had been captured for Work Done in the period selected when the report was run.

- The 'ANY' choice means that 'Condition 1' OR 'Condition 2' etc. must be true for the information produced in the report. In the example below we would be asking to see information where the Caseworker was 'Robin' or 'Phil'.

## Indent or Outdent Condition

Indent

Outdent

The Indent function allows you to 'nest' or bracket a condition or series of conditions. When an Indent begins you have the choice to decide whether 'All' or 'Any' of the indented conditions should apply. It is only possible to indent to one level.

Using the Indent/Outdent facility allows you to combine the 'All' and 'Any' qualities in a series of conditions on a report. Possible uses and descriptions of their effect are given in the two examples below. When using this aspect of the reporting module it is best to first practice with small sets of data where you know what results to expect. You should only use Indent/Outdent and All/Any options of the reporting module in your standard reports after you become familiar with their effects.

It is important to remember that the sequence of conditions is applied to each record that will appear in the report i.e. if you select 'All', then all of the following conditions must be true for each record or line of information that appears in the report.

### Examples:

1. If your users are broken up into groups who work in teams, you might want to run reports that view the records associated with those caseworkers. Suitable conditions might be as in the following example where the 'All/Any' option is used:

The conditions in the Report Detail screen below would show you any of the records where 'Eileen Racher' was caseworker **and** any of the records where 'Kera Buhtan' was caseworker **and** any of the records where 'John Ferdinand' was caseworker.

The screenshot shows the 'AIMS - Report Detail' window. It contains the following fields and controls:

- Report Title: Welfare Benefits team - Open Cases
- Report Layout: Open Casework in a Period
- Report Description: (Empty text area)
- Owner: ADMIN
- Category: Welfare Benefits Rep
- Include records where: ANY of the following are true...
- Condition 1: Subject: Caseworker is equal to ER Eileen Racher
- Condition 2: Subject: Caseworker is equal to KB Kera Buhtan
- Condition 3: Subject: Caseworker is equal to JF John Ferdinand
- Buttons: Indent, Outdent, Runtime Toggle, Add Condition, Delete Condition, Run, OK, Cancel

## Note

If instead of 'Any' the 'All' option had been selected, the conditions in the Report Detail would not have shown any records at all. The conditions would have been asking for single records where the caseworker was 'Eileen Racher', 'Kera Buhtan' and 'John Ferdinand' – this is impossible as there is only one caseworker attached to each case in AIMS so no records would be selected.

2. In the following report we are still looking at the casework undertaken by the Welfare Benefits team but this time we want to look at their casework that has been closed in a period. One way to consider the conditions necessary to select the contents of the report is to say that '**All**' following two conditions need to be true for a record to be selected:

a. That the records are those of team members.

and,

b. That they were closed in a defined date range which is set entered each time the report is run.

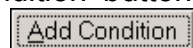
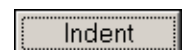
The first condition a) is the same as the list of conditions in example 1 but this time the list needs to be 'indented'. When conditions are indented they all start with the same

Condition ID	Field	Operator	Value	Label
1	Where ANY of the following are true...			
1.1	Subject: Caseworker	is equal to	ER	Eileen Racher
1.2	Subject: Caseworker	is equal to	KB	Kera Buhtan
1.3	Subject: Caseworker	is equal to	JF	John Ferdinand
2	Subject: Date Closed	is between		* Runtime Condition *

number i.e. 1.1, 1.2, 1.3, 1.4, etc..

## Note

1. When creating an 'Indented' list of conditions, use the 'Indent' button to enter the first indented condition and then use the 'Add Condition' button to add further indented conditions.



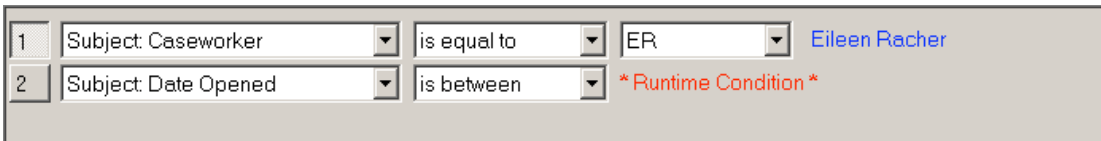
To add a non-indented condition after you have completed your listing of indented conditions, click the 'Add Condition' button and then click the 'Outdent' button – this will create another whole number condition.



2. The 'All/Any' option at the top of the conditions pane refers to all the whole number conditions in the conditions pane. The 'All/Any' option at the top of an indented list within the conditions pane refers only to the indented list of conditions.

## Deleting Conditions

To delete a condition in a Report Detail, select the condition that you want to delete by clicking on the number at the beginning of the condition to make it the active condition. When the condition is selected the number will look as if it is depressed or greyed.



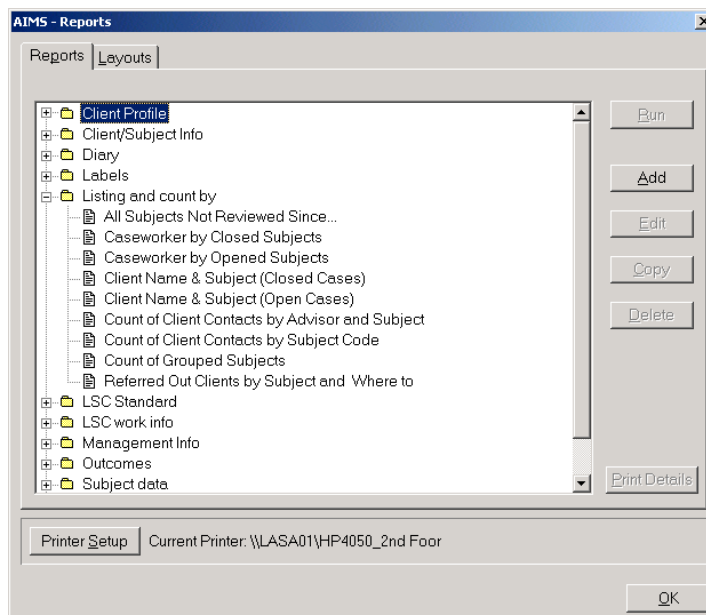
In the above example, condition '1' is the active condition. Once the condition is selected it can be deleted by clicking the 'Delete Condition' button.



Once the Condition'

## Editing Reports

This facility is only available to Administrators or to users who have been given the 'Report Edit' permission which allows users to either Add, Edit, Copy or Delete reports. If you have been given this permission you will be able to see the Add, Edit, Copy and Delete buttons that are shown in the example below. If not, you will need to contact your system administrator to have a report edited.




From the Reports window select the report that you wish to edit. Once selected, click the 'Edit' button and the Report detail window will open. The report can then be edited.

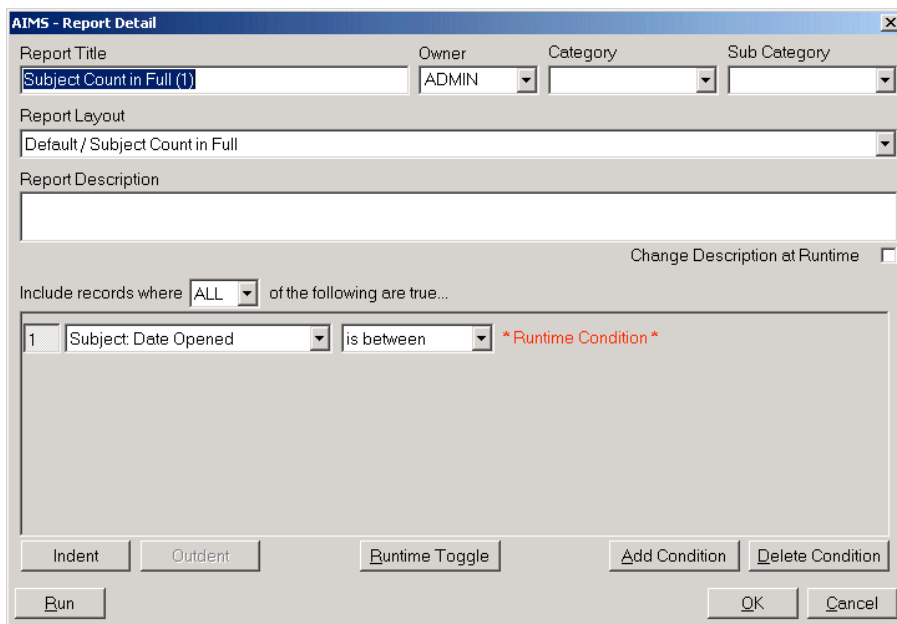
**Note** Editing a Report Detail permanently changes that report. If the original report is likely to be needed again by some users within your agency then you should 'Copy' a report first and then edit the copy that you have created.

## Copying Reports

This facility is only available to Administrators or to users who have been given the 'Report Edit' permission which allows users to either Add, Edit, Copy or Delete reports. If you have been given this permission you will be able to see the Add, Edit, Copy and Delete buttons that are shown in the example in 'Editing Reports' above. If not, you will need to contact your system administrator to have a report copied.

To copy a report, select the report the report that you wish to copy in the  Reports

This will open a Report Detail based on the selected report but with a 'new' name and with the 'Category' empty.



This report can now be Edited as required without affecting the report which it was based on. The name displayed in this Report Detail is the name of the report the copy was based on plus '(1)' – this is because in AIMS, all the reports must have a unique name. Your first action should be to give the report another name which describes what this report is to be used for.

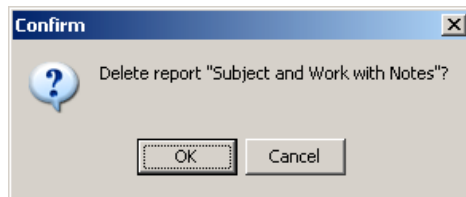
## Deleting Reports

This facility is only available to Administrators or to users who have been given the 'Report Edit' permission which allows users to either Add, Edit, Copy or Delete reports. If you have been given this permission you will be able to see the Add, Edit, Copy and Delete buttons that are shown in the example in 'Editing Reports' above. If not, you will need to contact your system administrator to have a report deleted.

To delete a report, select the report that you wish to delete in the Reports window and then click the 'Delete' button.



This will open a Dialogue box asking you to confirm whether you want to delete that report.



### Note

Once a report has been deleted there is no way to undo the deletion.

This section of the guide explains how to use the report Layout Wizard to create or modify the report layouts that are used as the basis of all the reports within AIMS. To use this section of AIMS you will need to be logged on as a user with 'Layout Edit', or 'Administrator' permissions.

### User Permissions

There are three levels of access that a user may have to the reports module within AIMS.

- Users who can only run reports that have been previously created within AIMS. This is the minimum level of access and is available to any user.
- Users who are 'Able to add, edit, and delete reports' as well as run existing reports. This level of access is selected by choosing the permission 'Report Edit' in the [Managing Users / User Detail Screen](#).
- Users who are 'Able to add, edit and delete report *layouts*' as well as run existing reports. This level of access is selected by choosing the permission 'Layout Edit' in the [Managing Users / User Detail Screen](#).

### Note

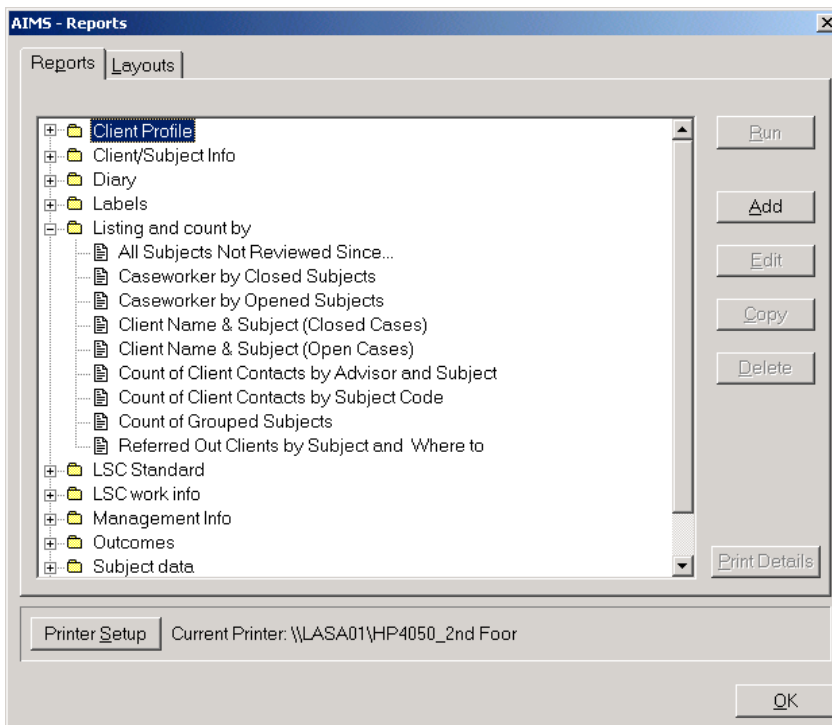
All users who are 'Administrators' have full access to all areas of the reports module automatically.

### Who should read this chapter

You only need to read this section of the User Guide if you want to create or modify report layouts. If you want to know how to apply report layouts to create or modify reports, please read the chapter '[Adding, Editing, Copying and Deleting Reports](#)'. If you want to know how to run existing reports, please go to the section '[Running Previously Created Reports](#)'.




## Opening the Report Module

1. From the Menu Bar select “Reports” and then from the drop down list that appears, select “Reports”. A screen similar to the one below will appear.



### Note

If you are opening the ‘Reports’ module for the first time there may well be fewer directories displayed within the reports window.


2. In the image above the reports window displays the report directories created within AIMS in the form of a tree directory. By clicking on the  sign to the left of the report directory you can view any reports that have been previously created and placed in that directory. The AIMS “Listing & Count by” directory has been expanded and now displays a  against the directory name. Clicking on the  sign collapses the tree.

## Opening the Report Layout Screen

Report Layouts are the underlying designs on which all reports are based. One layout can be used as the basis for several reports or as the basis for another report layout.

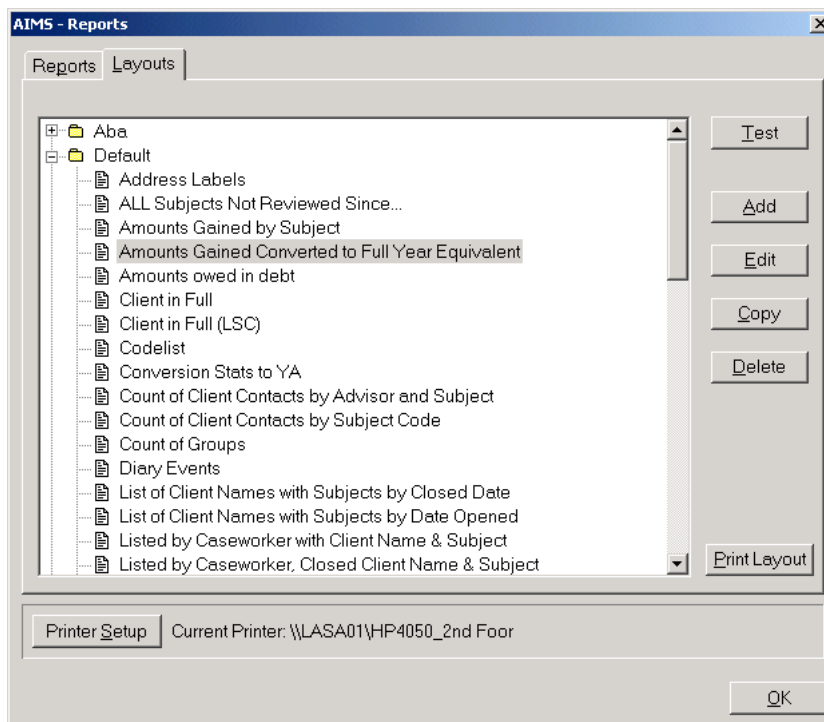
1. On the ‘AIMS – Reports’ window, click the tab at the top of the Reports window marked ‘Layouts’.



This will switch you to the Layouts section of the Report window. This displays report layout directories that have been created in AIMS. By clicking on the  sign to the left of the report layout directory you can view any layouts that have been previously created and placed in that directory. Each report layout has an owner who is the person who created the report and who is entitled to alter its layout.

## Note

Any alterations to a report layout will affect all reports that are based on that report layout. You should not alter an existing report layout unless you are sure what effect this will have. If you need to use an existing report layout as the basis for a new report use the 'Copy' function and work with that 'new' report layout.



## Testing a Report Layout

If you are not sure whether an existing report layout may suit your needs you can test layouts from the Reports Layouts screen by using the 'Test' button. This will help you to decide whether you already have an existing report layout that does what you want or can be easily modified or whether you need to create a new layout. For further details on how to modify an existing report layout see the section '[Editing, Copying and Deleting Report Layouts](#)' at the end of this section.

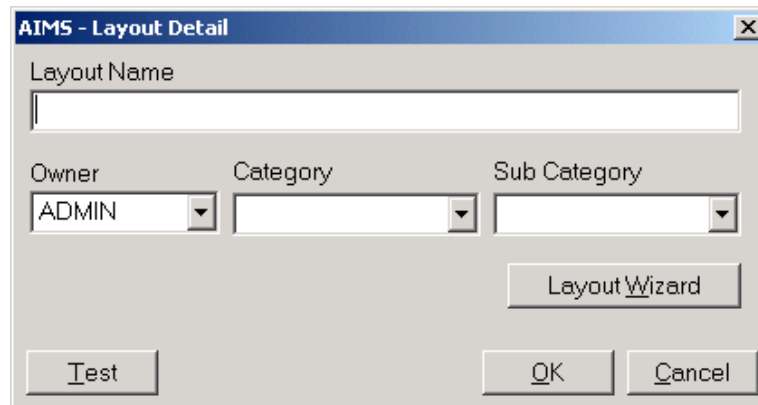
## Adding a New Report Layout

Before you can create a report layout you must first of all decide how you want your report to look. One way of approaching this is to write a description of what you want the report to show, the information you want displayed and the way you want this information grouped and/or sorted. You will also need to think about whether you want to count or sub-total this information.

A possible description of a report might be: All Work Done, grouped by Subject, displaying Date Opened, Date Closed, Time and Subject Reference for each Client; showing a count of Time with sub-totals by Subject.

### Report Layout Detail Screen

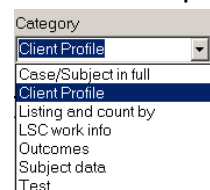
1. Having considered the purpose and structure of your report you are now ready to add a new report layout. On the 'AIMS – Report Layout' window, click the button marked 'Add'. This will open the form 'AIMS – Layout Detail'.

A dialog box titled "AIMS - Layout Detail" with a close button (X) in the top right corner. It contains a text field for "Layout Name", three dropdown menus for "Owner" (set to "ADMIN"), "Category", and "Sub Category", a "Layout Wizard" button, and "Test", "OK", and "Cancel" buttons at the bottom.

#### Note

If you have copied an existing Report Layout to use as a template then you will need to amend the choices already made in that layout. This section only describes the process where no layout currently exists for further details on modifying an existing report layout please see the section ['Editing, Copying and Deleting Report Layouts'](#).

2. Complete the information required in the "AIMS Layout Details" box. Every report layout needs a different name and it is best to give each report a name that describes as exactly as possible the data fields contained in the report and their relationship. Remember that other people coming to use these report layouts in the future will need this description to understand the purpose of the layout you have created. If you were planning to create the report described earlier above, a good description would be 'Work Done by Subject'.
3. The 'Owner' field tells you who has created the report and who should alter the report. Used properly this should enable users to avoid making changes to other users reports.
4. In the "Category" field you can choose where the report will be stored. You can either select a choice from the drop down menu or create a new category by typing directly into the field. The different categories are used to generate the directory tree in the Reports window.



- The “Sub Category” field is optional and if used would create a sub-directory in the tree structure, where the report would be located.

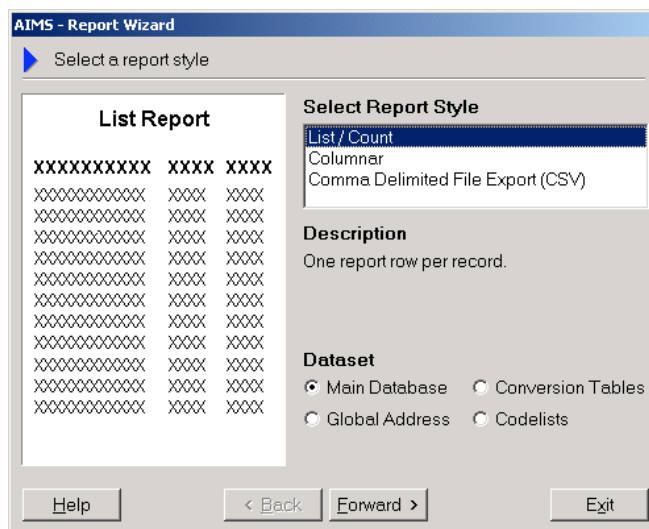
## Selecting a Report Style & dataset

- Once you have defined the name, ownership and category of the report click the ‘Layout Wizard’ button. This will open the ‘AIMS – Report Wizard’ that will guide you through the creation of a new Report Layout.

Layout Wizard

### Note

If you have chosen to copy an existing Report Layout to use as a template then you will be amending the choices already made. This section describes the process where no layout choices currently exist.



- The first screen asks you to select a ‘Report Style’. There are three choices: List / Count, Columnar, and Comma Delimited File Exports (CVS) style reports.
  - The ‘List Count’ is the most commonly used where information needs to be displayed in rows or per record e.g. List of Client names by caseworker with Subject Reference, Date Opened and Date Closed.
  - The ‘Columnar’ report style allows you to create a report where several rows of information can be displayed for each record. It is not possible to Group, Summarise or Count results in a columnar report e.g. .
  - The “Comma Delimited File Exports (CVS)” will place all report information into a format that is ready for importing into other third party applications that can read “CVS” reports, e.g. spreadsheets or merge documents.
- The screen also allows you to select a dataset. AIMS has four different datasets available to choose from, the default choice is always the main data table, i.e. the data relating to your clients and their subjects. There are four choices: Main Database, Conversion Tables, Global Address and Code Lists.
  - The Main Database contains information relating to clients, subjects work done outcomes etc.
  - The Conversion Tables contains information relating to the different values held in the various conversion tables defined within AIMS. (See the Conversion Tables section of the Help Guide for further details.) Select this dataset when you wish to print out or review the contents of a conversion table.

- The Global Address Book (GAB) contains information relating to the Organisations and addresses that have been input into the Global Address Book (See GAB section of the Help Guide for further details). Select this dataset if you wish to print out and review the contents of the GAB.
- The 'Code List' contains information relating to the various code lists and associated descriptions used throughout the database in the drop down lists attached to fields. Select this dataset if you wish to print out and review the contents of the Code Lists used throughout AIMS.

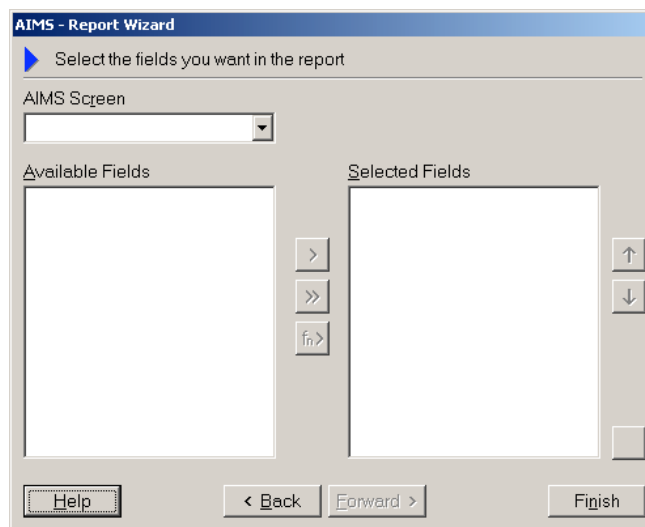
4. Once you have selected a style and dataset, click the 'Forward' button.



**Note**

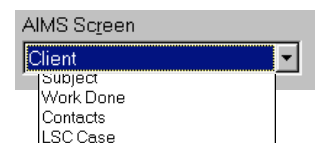
In the following sections the descriptions of what can be done and how to do it are based on a List Count style report using the Main database. The principles behind how the various screens work in the Report Wizard are the same for all styles of report but some screens may not be available and options may be more limited for certain report styles.

**Selecting the Fields you want in the Report**



1. This screen lets you select the fields that will be used by the Layout Wizard to produce the report layout. This screen is divided into three areas: the 'AIMS Screen' field, an area showing the 'Available Fields', and an area showing the 'Selected Fields'.

2. Start by selecting an AIMS screen that contains some of the fields you require for your report. Clicking the arrow to the right of the 'AIMS Screen' field will show the available fields.

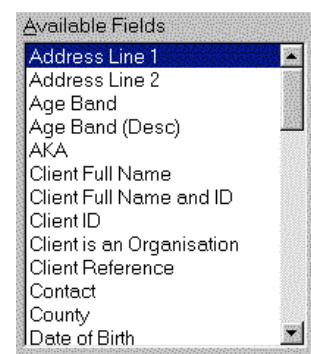




**Note**

For datasets other than Main, AIMS will automatically display the fields relevant to that dataset. Fields can be de-selected from these lists but no additional fields can be added.

- When you select a Screen from the dropdown list you will then see all the fields on that AIMS screen displayed in the Available Fields box. This includes any user defined fields that you may have created.

The picture to the right shows some of the fields that could be displayed if the 'Client Screen' had been selected in the AIMS Screen field when creating a List Count or Columnar report.



- Within each of the AIMS screens in addition to the fields that actually exist within AIMS, will be a "Count of..." field, e.g. "Count of Clients" or "Count of Subjects". Count of fields all start with the "#" symbol. If your report is intended to count some aspect of that screens data then you will need to also include the "Count of..." field from that screen . E.g. If you want to count the number of clients from different ethnic backgrounds referred in this month, then in addition to the Ethnicity Field you should also include the Count of Clients field.
- In report layouts AIMS screens you will see a "#" symbol followed by the name of the thing being counted, e.g. **# Client** is counting clients, and **# Subjects** is a count of subjects. It is possible to combine two or more counts in the same report. The hash symbol "#" will appear in the column heading.
- You can now select which fields you want from the screen you have chosen in the Available fields window. This is done either by double-clicking an entry or by using the two buttons in the middle of the Layout Wizard screen. The top button enters a single field that has been selected with the mouse, the lower button enters all the fields displayed in the Available Fields window.
 
- If a field is selected in error it can be removed from the 'Selected Fields' window by highlighting the required field and then using the delete button, or by highlighting and double clicking on the selected field.
 

Once you have selected the required fields, chose another screen from the list under the AIMS screen section and continue doing so until you have selected all the fields required for your report.

### Note

In the description of the sample report given above at the start of the section on Adding a New Report Layout (All Work Done, grouped by Subject, displaying Date Opened, Date Closed, Time and Subject Reference for each Client, showing a count of Time with sub-totals by Subject) the fields described come from the following screens.

Client screen

Client Full Name and ID

Subject screen	Code – the name of the field used to classify Subjects Count of Subjects – this will enable the counting of how many subjects are in the final report Caseworker
Work Done screen	Date - date the Work Done was carried out Work (Desc) – the description of the Work Done Work – the code for that type of work Time Spent - the number of minutes recorded

## Changing Field Order

8. If you need to change the order of the fields in the Selected Fields window you can do this by using the two buttons to the right of Selected Fields window.



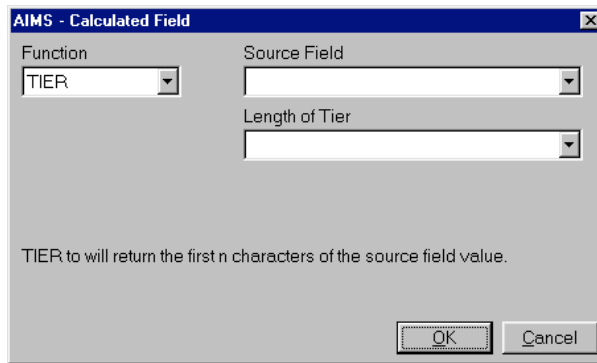
Select the field that you want to move in the Selected Fields window and use the appropriate button to either raise or lower that field's position.

## Using a Calculated Field

**Note: Using calculated fields is complex and those new to report design may wish to return to it later, and move on the “Grouping” section of the guide.**

9. It is possible to use various forms of calculated fields in your report. These are:
- TIER Described below
  - PERIOD Described below
  - ADJUST Described below
  - SUBSTR Described below
  - CONVERT This function should only be used after reading the chapter on Conversion Tables.
10. To use one of the above calculated fields, using the 'AIMS Screen' field, select the screen that contains the field that you wish to use as the basis for the calculated field.
11. Then click the 'fn' key which will open the 'AIMS – Calculated Field' window.





12. Select the function you require using the 'Function' field. Each function selected generates a slightly different form.

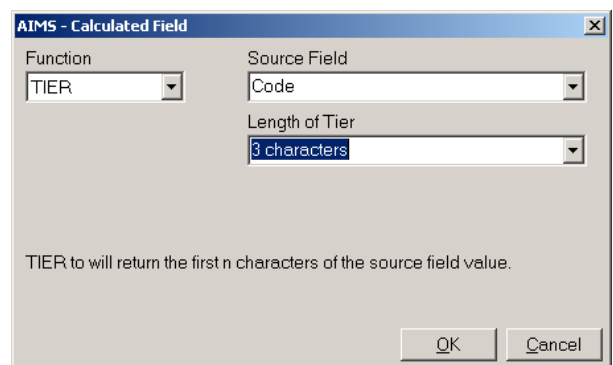
### The TIER Function

The term 'Tier' refers to the structure of the classification system used in a coded field. If a coded field has a 'tiered' structure for example, AAAA.BBBB.CCCC.DDDD where the dots represent the beginning of a new level or tier then the TIER function allows you to select the first 'n' characters of the selected coded field.

An example of a coded field whose classification system is tiered is the Detailed Advice classification (see the AIMS directory sub folder "Classifications". Examples of some of the Detailed Advice codes are:

Code	Description
ACC	ACCOMMODATION/HOUSING
ACC.END.A	Overcrowding
ACC.END.B	Ending Tenancy
ACC.END.C	Selling Home
WEL	WELFARE RIGHTS
WEL.CON	Contributory Benefit
WEL.CON.A	SMP
WEL.CON.B	SSP

Using the above example, if you were to select the first three characters of the 'Code' field using the TIER function, this would mean that the tiered field could be used to group the above codes into groups in a report that began with the same three characters. The results would be as below:



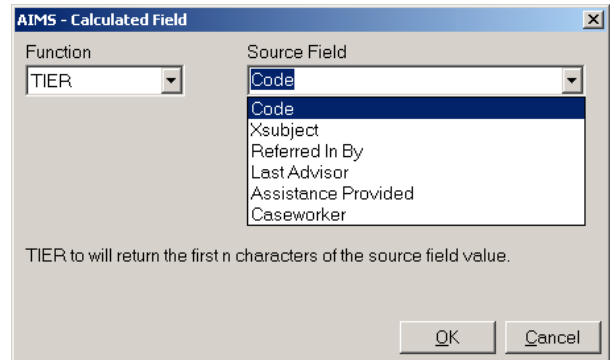
Code	Description
<b>Code (Tier 3)</b>	<b>ACC – ACCOMMODATION/HOUSING</b>
ACC	ACCOMMODATION/HOUSING
ACC.END.A	Overcrowding
ACC.END.B	Ending Tenancy
ACC.END.C	Selling Home

## Code (Tier 3)      WEL – WELFARE RIGHTS

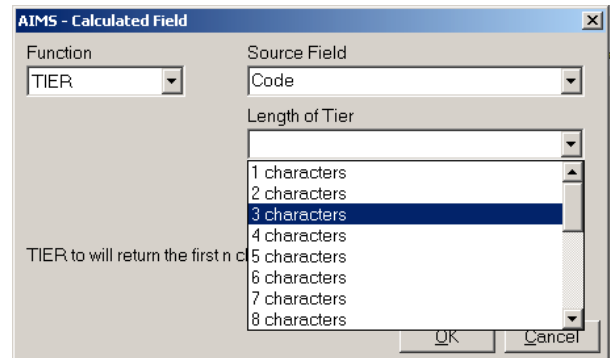
WEL            WELFARE RIGHTS  
WEL.CON    Contributory Benefit  
WEL.CON.A SMP  
WEL.CON.B SSP

### Creating a TIER Calculated Field

13. Select a coded field using the 'Source Field' field's dropdown box (remember that the coded fields being offered are based on the AIMS Screen selection in the previous screen).



14. Now decide on what level you wish to tier to. If you are unsure of the structure of the coded field you are trying to tier you can check this by observing the code in the Coded Fields section of the Configuration module.

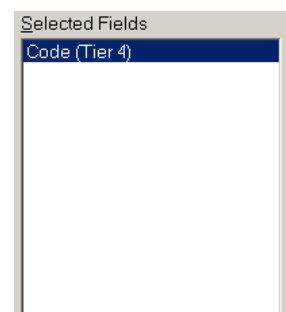


### Note

It is only possible to TIER a coded field and use the results meaningfully if all the codes in the coded field have been created consistently using the same structure.

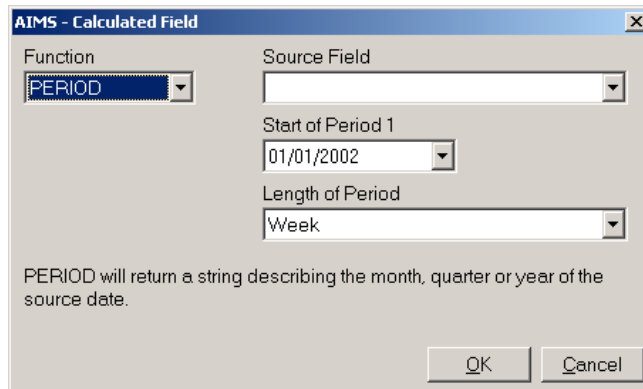
15. Click 'OK' when you have finished defining the function.

16. The new calculated field will appear in the 'Selected Fields' pane of the 'Select the fields you want in your report' window. These fields can be used within your report as you require.



## The PERIOD Function

The PERIOD function allows you to group your report into periods of various lengths: Week, Month, Quarter, Year. Each report layout that uses the PERIOD function needs to have defined within the report layout the date on which the first period begins. The PERIOD function can be based upon any date field held within AIMS.



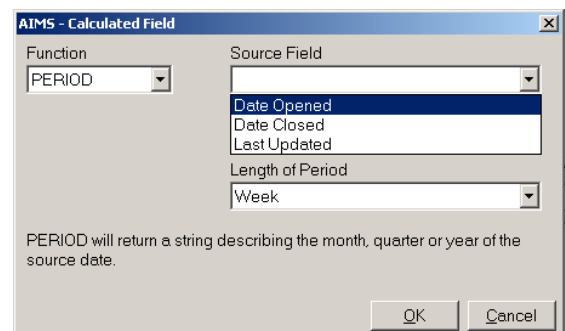
### Note

The selection of which date field to base the PERIOD function on should be considered carefully. The data in the report will be grouped according to the date field you have selected for the period function. If the date field is blank or not yet entered in some of the date fields you want to report on, the associated data rows will not be reported on.

An example of this might be choosing Date Closed from the Subject Screen. Not all subjects will have a Date Closed so the only subjects that will appear in the report grouped by periods would be those with a Date Closed entry. If one had chosen Date Opened all subjects would have appeared in the report as every Subject must have a date on which it was opened.

## Creating a PERIOD Calculated Field

17. Select a date field using the 'Source Field' field's dropdown box (remember that the date fields being offered are based on the AIMS Screen selection in the previous screen).

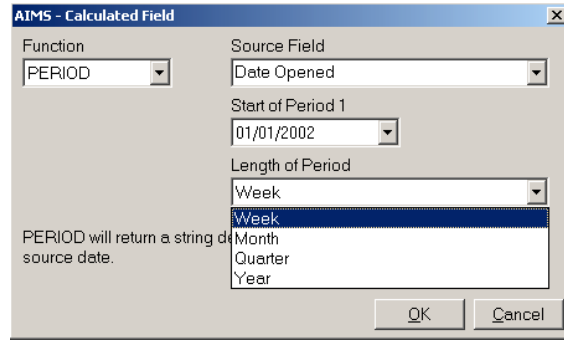


18. Now enter which date you want the first period of the report to start on.

### Note

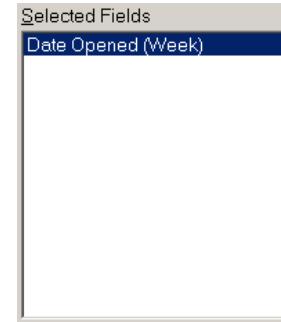
As this date cannot be changed except by editing the report layout it is a good idea to make some reference to this date in the report title.

19. Now enter which length of period you want to report on.



20. Click 'OK' when you have finished defining the function.

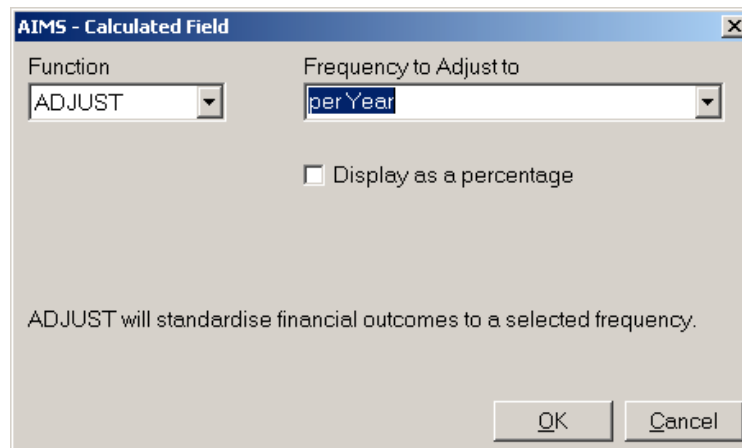
21. The new calculated field will appear in the 'Selected Fields' pane of the 'Select the fields you want in your report' window. These fields can be used within your report as you require.



### The ADJUST function

The ADJUST function allows you to take financial information that has been collected using different frequencies (e.g. financial outcomes captured using a range of weekly, monthly or annually figures) and to display the results in one format. E.g. Per Quarter costs can be displayed as an Annual equivalent as the ADJUST function will multiply the quarterly figure by four to give the Annual figure.

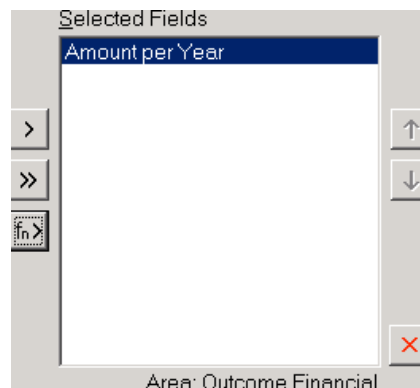
The ADJUST function can only operate when a financial field has been included in the "selected fields" report pane.



22. Having selected Adjust from the function drop down, select the frequency (i.e. weekly, monthly quarterly or yearly) that you wish to see presented in the final report.

**Note** Unlike other calculated fields AIMS does not need to be told which field to complete this operation on and will adjust any field containing financial information that is contained in the report layout.

23. Click “OK” when you have selected the adjusted frequency you wish to appear in the report.
24. The new “Amount per ...” field will appear in the ‘Selected Fields’ pane of the ‘Select the fields you want in your report’ window. These fields can be used within your report as you require.
25. It is possible to select more than one adjusted frequency per report but to do so you must return to the function field by clicking the “Fn” function key again and repeating the process.



### The CONVERT function

The CONVERT function is used along with the Conversion Tables to create reports, which though the original data was gathered using one set of values, can be reported on using another.

For example:

Data may have been collected using the Ethnicity codes that come with AIMS.

Code	Description	Code	Description
A	White		
A1	English		
A2	Scottish		
A3	Welsh		
A4	Irish		
A5	Other White (non British)		
B	Black or Black British		
B1	Caribbean		
B2	African		
B3	Other Black		
Etc.			

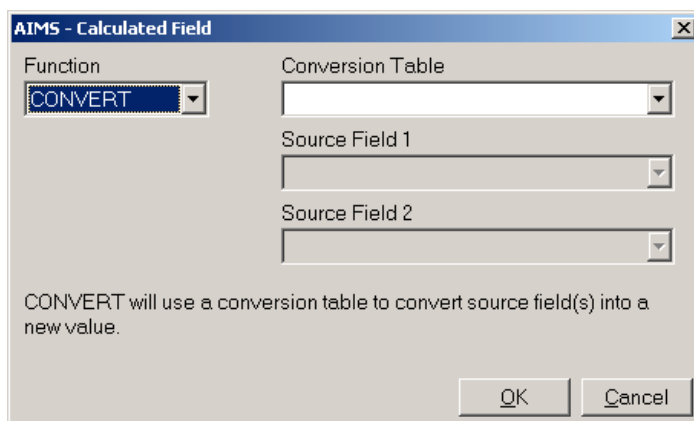
For your report for your funder though you need to report on the data you gathered under the following headings (Legal Services Commission):

Code	Description	Code	Description
00	Other		
01	White British		
02	White Irish		
03	Black/Black British African		
04	Black/Black British Caribbean		
05	Black/Black British Other		

- 06 Asian/Asian British Indian
- 07 Asian/Asian British Pakistani
- 08 Asian/Asian British Bangladeshi
- 09 Chinese
- Etc.

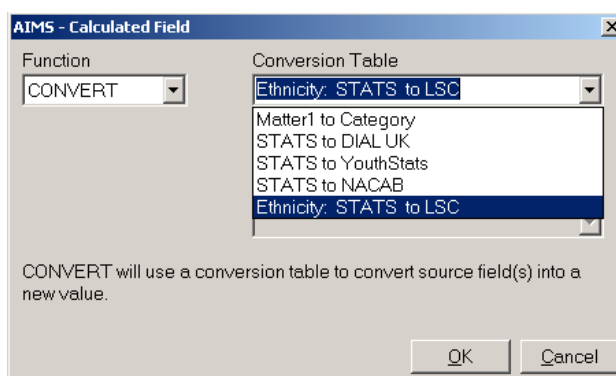
To do this you must first have created a Conversion Table that defines which values (A1, A2, etc.) are mapped to which of the new headings (Other, White, Irish, etc). Please see the section [Conversion Tables](#) for details on how to do this.

When you are creating the report layout, you then need to create a CONVERT calculated field which is used in your report to display the original Ethnicity data under the new LSC headings.



### Creating a CONVERT Calculated Field

26. As described above in **Selecting the Fields you want in the Report**, using the 'AIMS Screen' field select the screen that contains the field that you wish to use as the basis for the calculated field. Then, select CONVERT in the 'Function' field on the calculated field form.

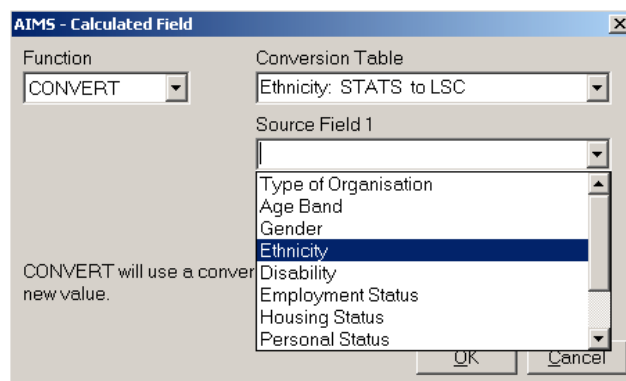


27. Select a Conversion Table using the 'Conversion Table' field's dropdown box (see Conversion Tables for how to create a conversion table).

### Note

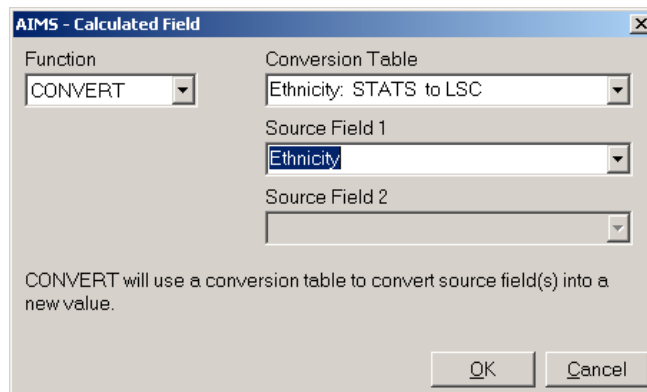
Having selected a Conversion Table you will find that the 'Source Fields' become active. Some conversion tables use only one source field in which case you will find that only 'Source Field 1' is active.

28. Now select the 'Source Fields' which you wish to convert using the Conversion Table. The chosen Source Field must be a coded field which is based on the same set of codes that the Conversion Table is based on.



In the example shown above, the selected Conversion Table converts STATS ethnicity codes to LSC ethnicity codes. The table has only one Source Field (the STATS ethnicity code) and any Source Field chosen for the CONVERT calculated field must be based on the STATS ethnicity code.

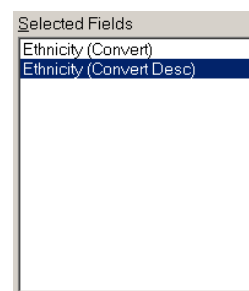
29. Where the Conversion Table selected is based on two Source Fields, 'Source Field 2' must also be chosen as a coded field based on the same set of codes that the Conversion Table's second source field is based on.



In the example shown there is no 'Source Field 2'.

30. When you have completed the Calculated Field form click the 'OK' button.

31. The new calculated field will appear in the 'Selected Fields' pane of the 'Select the fields you want in your report' window. The 'Ethnicity (Convert)' field is a coded field based on the result of the Conversion Table. The 'Ethnicity (Convert Desc)' is the description that relates to that result. These fields can be used within your report as you require.

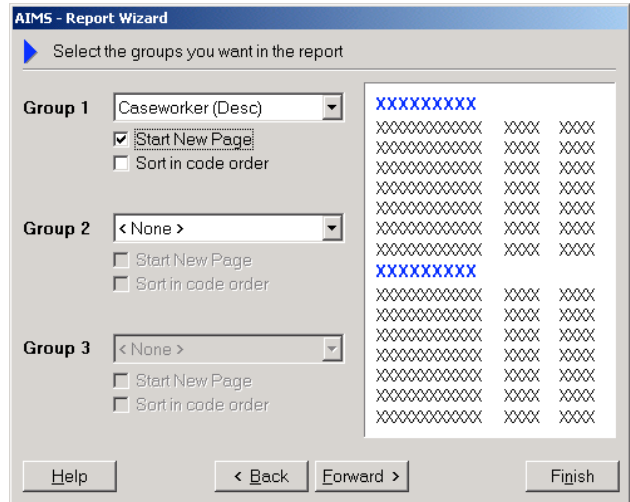


## Grouping

1. When you have finished Selecting Fields, click 'Forward' and the 'Select the groups you want in your report' window will open.

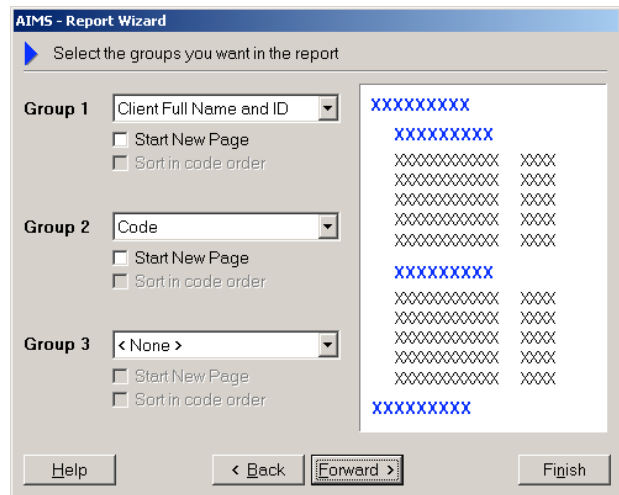
**Note**

This window is only available when you are creating reports in the List/Count report style.



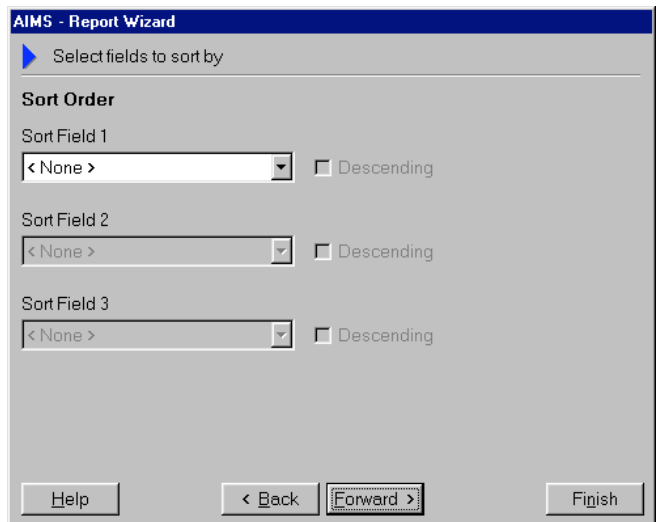
2. The grouping function allows you to group the data in the report. It is possible to create up to three levels of grouping.

In the example shown to the right, the information in the report is first grouped by the Client Full Name and ID. The information that appears within the Client Name group is then itself grouped by Code (this is the Subject Code).



**Sorting**

1. When you have selected the levels of grouping that you require, click 'Forward'. The 'Select fields to sort by' window will appear.
2. The sorting function allows you to decide which order the rows of data in the report are displayed. If you have created grouping levels the sort order will be applied within each group.
3. It is possible to have up to three levels of sorting in a report.



4. When you have selected the various sort orders you require, click 'Forward'. The 'Select summary options' window will appear.

## Summation

Summary options allow you to decide what totals or sub-totals to display in your report. These options relate to the "Count of..." fields that have been included in the report layout. If Grouping has been used in the report then the sub-total option will apply to any grouped information.

If you have included a time or numeric based field e.g. Work Done Time or Quantity, then the additional summation options for calculating and displaying the time information will also be available.

## Counts options

1. Where a "Count of ..." field has been included it is possible to select by ticking the appropriate boxes whether a value is displayed for each row, sub-total or overall total. If no "Count of ..." field has been included in the layout then the show options will be greyed out.
2. If more than one "Count of ..." field has been included in the Layout then the summation count options selected will apply to every "Count of ..." field, i.e. it is not possible for one "Count of ..." field to be sub-totalled while another one only has an overall count.

The screenshot shows the 'AIMS - Report Wizard' dialog box with the 'Select summary options' step selected. The 'Summation' section is active, showing options for 'Counts' and 'Row Count'. Under 'Counts', three options are checked: 'count on each row', 'sub-total for group(s)', and 'overall count'. Under 'Row Count', 'show the number of rows' is unchecked. The 'Calculate total for:' section has a list box containing 'Time Spent', which is checked. Below this, 'Hide:' has 'values making up total(s)' checked. 'Show:' has 'sub-total for group(s)' checked, while 'grand total' and 'average for each total' are unchecked. The 'Time:' section has three radio buttons: 'Show as minutes' (selected), 'Show as HH:MM', and 'Show as decimal'. At the bottom, there are buttons for 'Help', '< Back', 'Forward >', and 'Finish'.

3. Depending on the design of the report and which "Count of ..." fields have been included it is possible that the various sub-totals do not add up to the over-all total. For instance, where a report asks for Ethnicity grouped by Subject, and one client has several subjects, the clients ethnicity will appear as a single count under each subject, but for the purpose of the Overall Client total will only be counted once.

E.g.

One White Client has two subjects open, a Welfare Subject and an Immigration Subject.  
One Black client has one subject open, a Welfare Subject.

Subject	Ethnicity	Count of Clients	Count of Subjects
WELFARE			
	Black	1	1
	White	1	1
		<hr/>	<hr/>
	Sub Total	<b>2</b>	<b>2</b>
IMMIGRATION			
	White	1	1
		<hr/>	<hr/>
	Sub Total	<b>1</b>	<b>1</b>
		<hr/>	<hr/>
Overall Total		<b>2</b>	<b>3</b>

I.e. Although the sub-totals for the client count show 2 clients had a Welfare subject and 1 client had an Immigration subject the overall total is only 2 clients. This is the correct answer given it was the same client presenting with two different subjects.

4. A “Row Count” will tell you how many rows (that is the number of summed instances of a particular field) are contained in a report. For instance in the example ethnicity count above, there are 3 rows: Welfare Black; Welfare White and Immigration White.

### Calculate total for

5. Where a numeric or time field has been included in the report layout then the additional calculate total for options in the right hand pane will be available. If no numeric or time fields are included in the layout then no options will be displayed.
6. Each numeric or time field included in the layout can be ticked if you wish to see the information calculated. The subsequent hide or show choices will apply to every field ticked.

### “Hide” values

7. The “Hide” tick box if checked will collapse the rows of data that have been used to generate the group totals e.g. if work done time spent is not hidden then you will see all the individual time totals for each letter or interview, if hidden then only the total work done time will be displayed.

### “Show” values

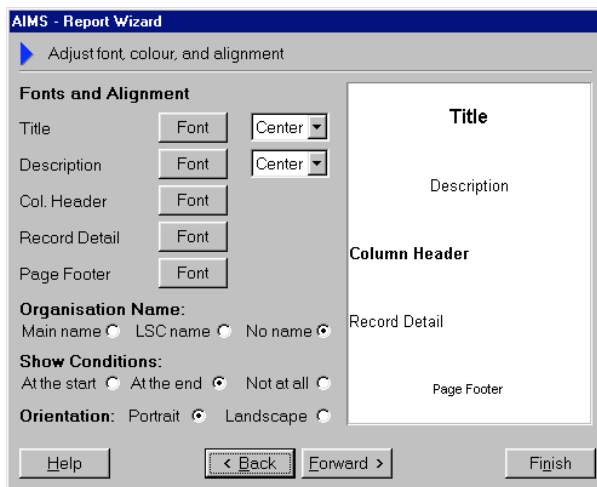
8. It is possible to select whether the report displays sub-totals, grand totals or averages for each total by ticking the respective boxes.

### “Time” values

9. Where a time field has been included in the layout you are able to select whether the information is displayed as minutes, hours and minutes, or decimal. Decimal converts the minutes into a fraction and is appropriate for export to excel spreadsheets.

## Adjust Font, Colour and Alignment

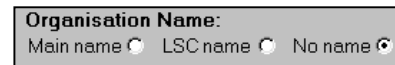
1. Clicking on a 'Font' button will allow you to adjust the Font, Font Style, Size, Effects, Colour and Script for all the styles of text in your report.



### Note

Changing the font selection for the 'Record Detail' will affect how much space will be taken by the rows of data displayed in your report.

2. Changing the orientation of the report from 'Portrait' to 'Landscape' will allow more columns to be displayed.
3. In the section "Organisation Name:":
  - The "Main name" is the name entered in the "Global Settings" option in the Configuration Wizard.



4. Show Conditions will display the conditions that have been used at the time the report is run, e.g. the date range used to select data, and will provide a permanent reminder attached to the main body of reported data as to the selection criteria.

### Note

All work in the Report Wizard must be completed and the reports module closed before it is possible to open the Configuration Wizard to create an organisation name.

## Adjust Field Widths and Headings

From this screen it is possible to change the field widths of each column in the report. It is also possible to rename the column heading so that its contents make more sense to the reader of the finished report.

## Changing the Field Width of a Column

Based on the choices you have made earlier in the Report Layout Wizard, AIMS calculates how much of the available paper width will be used by the report layout you have created.

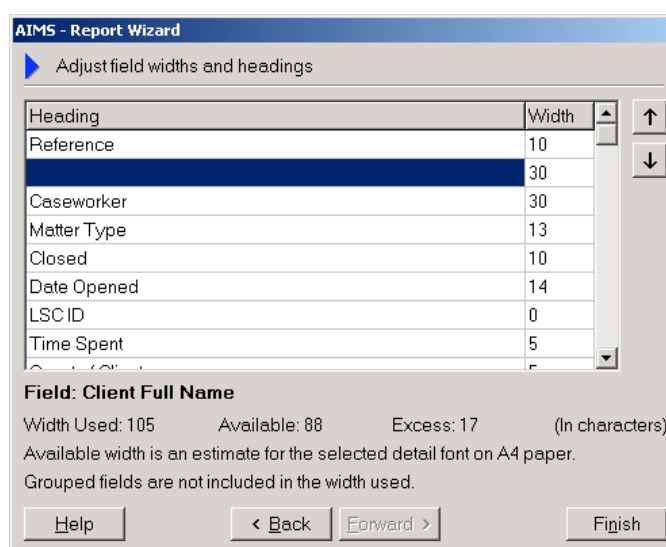
This information is displayed in the 'Width Used', 'Available' and 'Spare' fields that can be seen just below the main pane area. In the above example, the 'Width Used' is less than the amount 'Available' so all the columns in the report will be printed. If the 'Width Used' is greater than the amount 'Available' then you will need to change some of the column widths, or change the orientation of the report from Portrait to Landscape (see above), or change the font that the report is to be printed in (see above).

To alter the column headings or widths, follow the instructions below.

1. Under the "Headings" column select the field settings that you wish to alter by selecting with the mouse or using the arrow keys and return button. The 'Heading' is the heading of the column as it will be displayed in the report and the 'Width' is the width of that column.

### Note

Sometimes when creating reports it is necessary to include a field which is used in the report purely for Sorting the data i.e. you do not want the field displayed in the report. An example of this might be sorting by the Age Band Code list but only wanting to display by the Age Band description. To enable you to do this, the default value for the 'Age band code list' field can be set to zero.



2. Type in a revised heading name and/or column width.
3. As you tab out of the field having made any alterations the changes are saved automatically, and if you have changed the field width then the width used, available and displayed information will also have been updated.
4. It is possible to change the order in which the fields display by highlighting any part of the heading or width column of the required field and then using the up and down arrows on the right hand side of the window pane.

### Note

If the field you are moving up or down is the field that information is being grouped by then it will not be affected by its position in the order. Neither will changing the width of that field affect the overall amount of space available on the page.

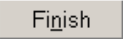
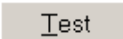
5. When you have finished using the Layout Wizard, click the 'Finish' button. This will return you to the 'AIMS – Layout Detail' form.



6. Clicking the 'OK' button on the 'AIMS – Layout detail' form will return you to the 'Reports Layout' screen. However you may wish to test your Layout and make some alterations before returning to the Reports screen, see below.

## Testing a Report Layout

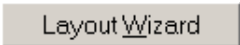

When you have completed your first pass through the Report Layout, it is likely that you will want to test the way it works/looks.

1. Progress through the various Report Layout Wizard design screens until you have completed your first pass through the wizard.
2. Click the 'Finish' button on the final Layout Wizard screen. 
3. Click the 'Test' button on the 'AIMS – Layout Detail' form. This will run the report layout but will only generate the first 100 records or the first 10 pages of the report. 

### Note

To speed up the creation of these 'Test' reports, the reports are based on only a sample of your data.

Also the test report is testing the layout and design of the report not the content. The layout will only be complete once you have added conditions in the main report window, so the data being present now may not reflect your final required selection.

1. Closing the report window will return you to the 'AIMS – Layout Detail' form. From here, clicking the 'Layout Wizard' button will return you to the Layout Wizard. 
2. Move through the screen using the 'Forward' button until you are back to the screen where you want to make further changes. 


### Note

In general, it is best to build up a report layout gradually testing it at various stages to see what impact the changes you are making are having within the layout and on the way your report will look.

## Editing, Copying and Deleting Report Layouts

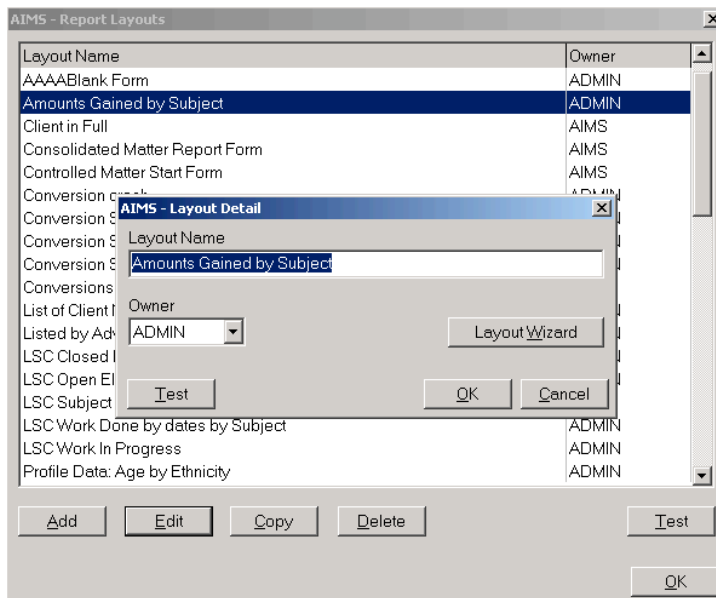
As well as Adding (see [Adding a New Report Layout](#) above) and Testing (see [Testing a Report Layout](#) above) from the Report Layout screen you can also Edit, Copy and delete existing report layouts.

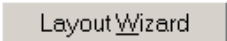
### Editing a Report Layout

1. Before editing an existing report layout there are some questions you should consider first:
  - Is the report layout being used as the basis for any existing reports? If so, are you sure what the effect of changing the underlying report layout will be on these reports?
  - Is the report layout you are considering altering yours to alter? If not, why are you altering someone else's report layout rather than creating one of your own?
  - Would it be better to create a Copy of the report layout and work with that rather than the original?
2. If you decide that you want to Edit a report layout, in the Report Layout screen select the report layout that you want to Edit either by highlighting the report with the mouse or using the tab and arrow keys.
3. Click the 'Edit' button. This will open the 'AIMS – Layout Detail'  form with the Layout Name and Owner details entered.

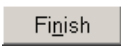
### Note

It is not possible to edit a report layout if the owner of the layout is 'AIMS'.

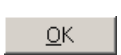


4. Clicking the 'Layout Wizard' button will take you to the Layout Wizard  where you can alter any of the elements of the report layout. For detail on how to work in the Layout Wizard see the section Adding a New Report Layout above.

5. When you have finished working in the Layout Wizard, click the 'Finish' button.



6. Click the 'OK' button to return to the Report Layouts screen if you are happy with the changes that you have made.



### Canceling any changes you make while Editing

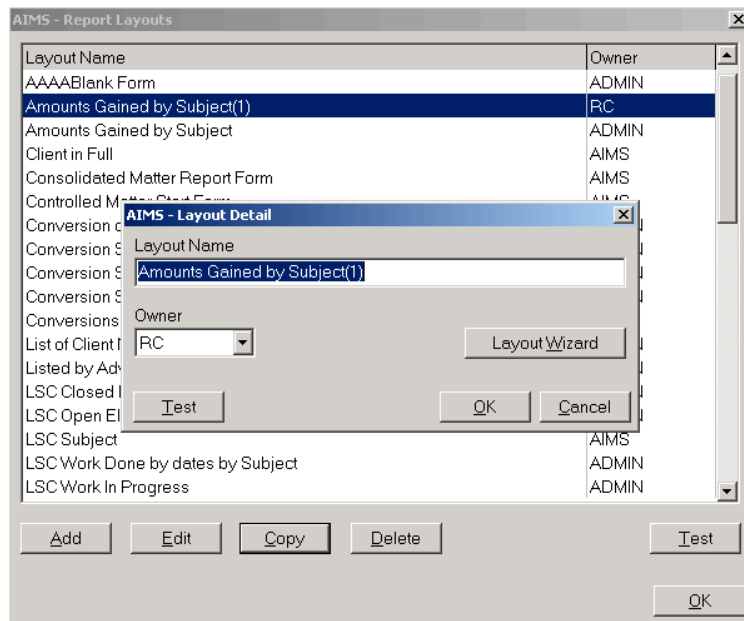
7. It is only possible to cancel any changes you have made to a report layout when you first leave the Layout Wizard and return to the 'AIMS – Layout detail' form. If at this point you click the 'Cancel' button then all the changes you have made to the report layout will be cancelled. Once you have clicked the 'OK' button it is not possible to undo your changes later on.



### Copying a Report Layout

You should copy a report layout when you want to make changes to an existing report layout that is either being used as the basis for existing reports or is the property of someone else and may have been designed with a specific purpose in mind.

1. In the Report Layouts screen select the report that you want to copy.
2. Click the 'Copy' button. This will open the 'AIMS – Layout Detail' form with the new Layout Name and previous Owner details entered.



3. Change the Layout Name and Owner Details as required.

4. To edit the details of this copied report layout, click the 'Layout Wizard' button. This will take you to where you can make any alterations that you require using the directions given above in the section 'Editing a Report Layout'.



## Deleting a Report Layout

You should only delete a report layout when you are certain that it is not going to be used as the basis for any reports that are needed within AIMS and that it does not belong to anyone who might have created it and still have use for it.

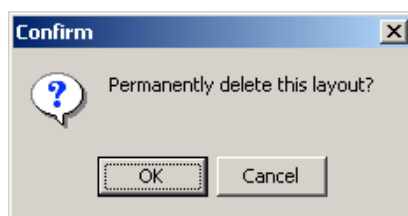
### Note

- It is not possible to recover a report layout once it has been deleted.
- It is not possible to delete a report layout that is used in one or more reports.

1. In the Report Layouts screen select the report that you want to delete.

2. Click the 'Delete' button.

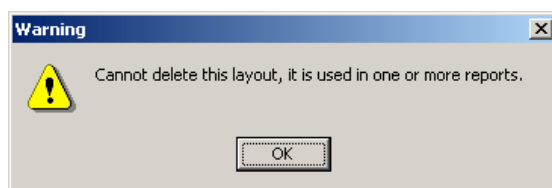
- If the Layout can be deleted, you will get the message:



3. If you wish to cancel, click the 'Cancel' button now as it will not be possible to recover the report layout after you have clicked the 'OK' button.

### Note

If you are trying to delete a report layout that is used in a report layout, you will get the message:



4. Click the 'OK' button. This will take you back to the Report Layouts screen.

## Report Layout Details Print Option

When the Layout is complete and you are satisfied with the design and field choices it may be useful to take a paper copy of all the configuration layout choices. If anyone accidentally alters your report you would have a paper copy to help you with the re-design.

1. In the Reports Layout screen highlight the Layout you wish to print.

2. Click the “Print Layout” button.



3. The information contained within the Print Layout report contains all the information and choices made at each stage of designing the Report layout.
4. The Report layout will be displayed in an on screen report style which can now be printed to paper or saved as a Word or Quick Reports document. See the “Printing Reports” section for further details of how to save reports in various formats.

### General Purpose

The Merge Suite is designed to enable the creation of mailing lists that can be used to write to the selected clients on mass. Each merge “query” leads to the creation of a “Tag List” or mailing list, these can then be either merged immediately with a mail merge template letter, or saved as a list of names and addresses for subsequent use.

This very powerful facility will enable users to write on mass to groups of clients, e.g. “All of John’s Cases opened this month”, or “All the Women over 60 with Housing Problems seen this quarter”. This would enable you to alert your clients to new services opening in the area, to mount a take up campaign, or communicate with one caseworkers clients about changes in their particular contact arrangements.

### User Permissions

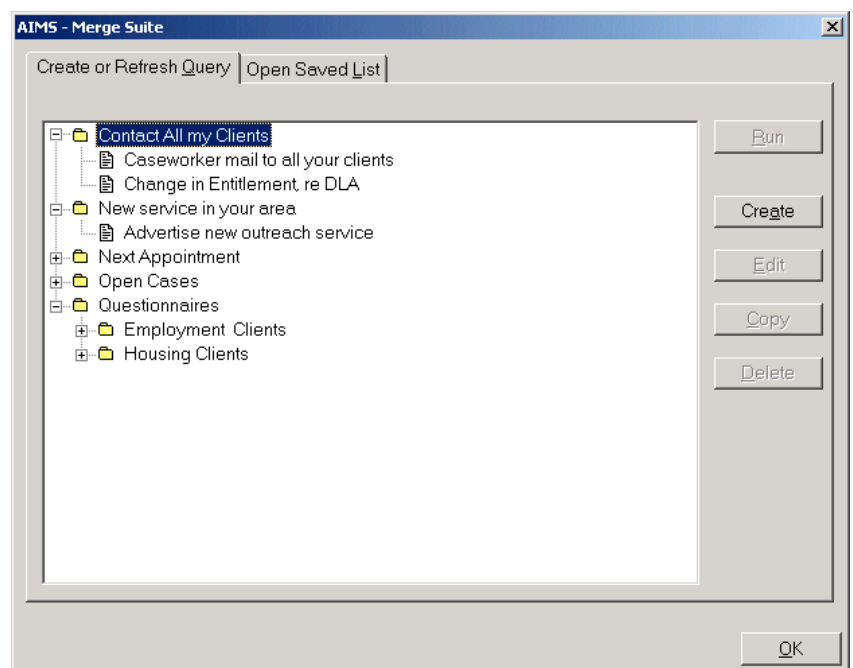
Access to the Mail Merge suite is not solely determined via Manage User permissions levels, but instead is based on who is the “owner” of the Query or saved query. If you are the owner then you are able to edit or delete your own queries. If you are not the owner then you are only able to run someone else’s query (but not edit it) or copy their query and make yourself the owner. This would then enable you to edit the copied query without altering the original.



In addition to the above permissions, anyone with Administrator level permissions in Manage Users has full access rights regardless of who the original owner of the query was.

### Opening the Merge Suite Module

From the Menu Bar select “Reports” and then from the drop down list that appears, select “MergeSuite” option.

**Note:** If you are opening the Merge Suite for the first time it will not look the same as the image displayed above, as it only includes a limited number of example “Queries”.



In the image above the Merge Suite window displays the “Create or Refresh Query” tab, showing directories created within AIMS in the form of a tree directory. By clicking on the  sign to the left of the query directory you can view any queries that have been previously created and placed in that directory. The “Contact All My Clients” directory has been expanded and now displays a  against the directory name.

The Merge Suite opens into the “Create or Refresh Query” screen. To view any previously saved lists click on the “Open Saved List” tab at the top of the screen. Saving a query is dealt with later.

## Re-using an existing query

### When to Refresh or Create a query and when to go to a previously Saved Tag List.

Previously created queries can run again (in AIMS this is referred to as being “refreshed”) at any time. The query contains a number of conditions that look for data that meet those conditions. As the information in the database changes over time (i.e. subjects are opened and closed) the mailing tag list produced by running the same query at different times will also change. The word “Refresh” relates to the list produced by the query, as the query itself has not been altered.

You would need to Create a new query if the mailing list you required had not been created yet as a query (See Creating a new query). Well designed queries, (e.g. using “runtime conditions”) will enable one query to be refreshed to produce several different mailing lists. For instance, “All subjects closed between [Run time condition] where the Caseworker equals [Run time condition]” would enable each caseworker to produce a list of their own clients closed that month. Each caseworker does not need their own query.

Sometimes, instead of refreshing a query which would generate a new mailing list you may want to return to a previously created and saved list. Saving a mailing list provides you with a snapshot of who met the query conditions at the time it was run and enables you to write to exactly the same people on multiple occasions.

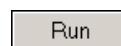
## Refreshing a query

Expand the directories in the Merge Suite window until you can see the query that you wish to run.

The query can be run in two ways:

Double clicking on the required query using the mouse.

Highlighting the query and clicking the ‘Run’ button.

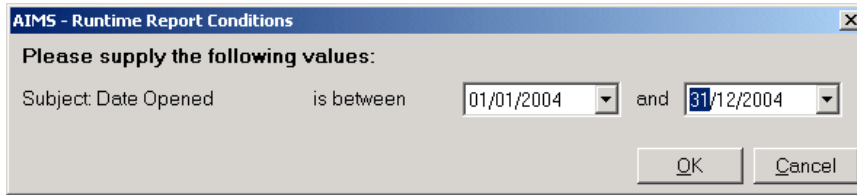


### Note

There are also keyboard alternatives for the above. A query can be highlighted using the ‘Tab’ and ‘Arrow’ keys and it can be run using the ‘ALT + R’ keys.

## Runtime conditions

Some queries are created using 'Runtime' conditions. If a query has a runtime condition, this means that each time it is run, the user will be asked to make some kind of choice before running the query.



In the above query the Runtime Condition is asking the user to fill in a range of dates.

## Note

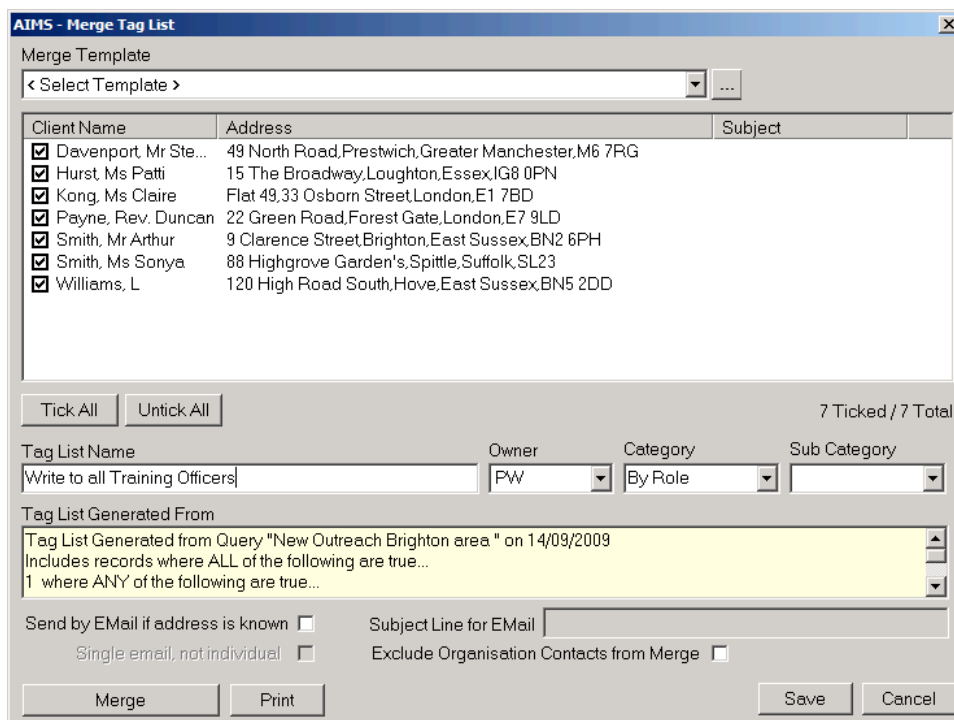
A report can have more than one runtime condition.

Once you have selected the appropriate values for the runtime condition, click the 'OK' button.




## The Merge Tag List

Once the query has been run a Merge Tag List window will open like the one below. This displays the list of those clients who met the conditions attached to the query. The window is displaying the result of the query, it is not the query itself. At this stage you can either select the merge letter from the Merge Letter Template drop down and then click on "merge", or save the merge list for later use.



## Merging the Tag List


To merge the tag list first select the correct letter from the Merge Template drop down menu. The drop down displays previously defined merge template letters, see Mail Merge configuration for further details.

It is also possible to use the  button to navigate to a template merge letter if it is not saved in the default directory.

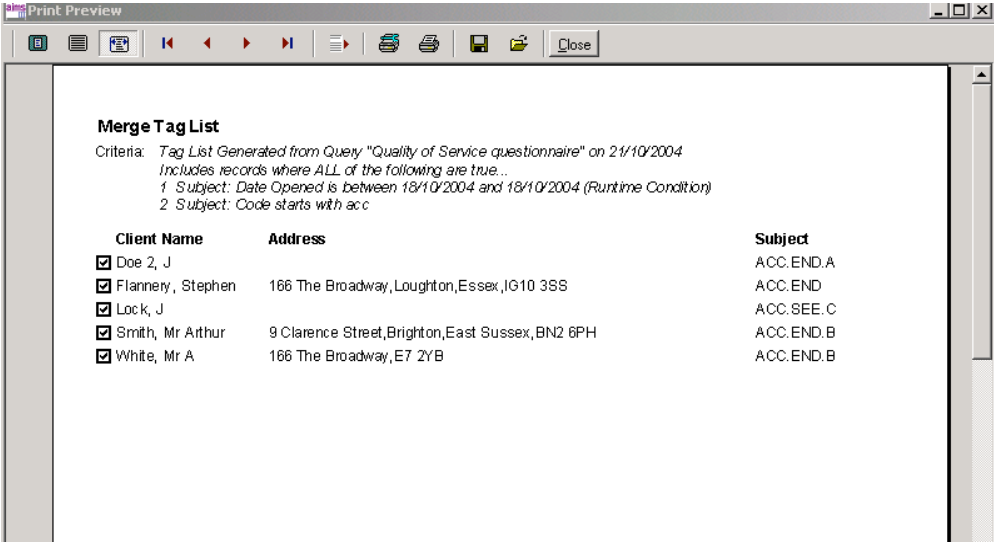
All the names on the list are “ticked” by default, which means they are all selected for merging. It is possible to “untick” individual names (select by clicking with the mouse in the tick box or using a combination of Tab Key, arrows and space bar) if you wish to de-select certain people or use the “Untick All” button.

At this stage you can create the merge letters by clicking the “merge” button. Once merged the letters will be available in your Word processing package and can be saved and printed as normal. AIMS will create a page break between each record, so it will only create one file regardless of how many clients were attached to the Tag list.

**Note:** You are not required to save the Tag List in order to generate merged letters. Lists should only be saved where you know there is a future need to return to that list.

The “Print”  Button allows you to produce a list of the records that were

selected at the time of running the query. This report can be printed and kept as a record of who was contacted and when.



The screenshot shows a 'Print Preview' window with a toolbar at the top containing icons for back, forward, search, print, save, and close. The main content area displays a report titled 'Merge Tag List' with the following details:

**Merge Tag List**  
Criteria: *Tag List Generated from Query "Quality of Service questionnaire" on 21/10/2004*  
*Includes records where ALL of the following are true...*  
1 *Subject: Date Opened is between 18/10/2004 and 18/10/2004 (Runtime Condition)*  
2 *Subject: Code starts with acc*

Client Name	Address	Subject
<input checked="" type="checkbox"/> Doe 2, J		ACC.END.A
<input checked="" type="checkbox"/> Flannery, Stephen	166 The Broadway, Loughton, Essex, IG10 3SS	ACC.END
<input checked="" type="checkbox"/> Lock, J		ACC.SEE.C
<input checked="" type="checkbox"/> Smith, Mr Arthur	9 Clarence Street, Brighton, East Sussex, BN2 6PH	ACC.END.B
<input checked="" type="checkbox"/> White, Mr A	166 The Broadway, E7 2YB	ACC.END.B

## Saving a Tag List

To save a Tag List you will need to complete some of the remaining fields.

“Tag List Name”: For identification by users. The name should identify the purpose or content of mailing list.

Each query has an ‘Owner’. This person retains the user permissions described above. Use the drop down list to select an owner for the report – the default selection is that of the logged on user.



Category (compulsory) and Sub-category (optional) are used to determine the location of the query in the tree directory after it is saved. You can either select a choice from the drop down menu or create a new category by typing directly into the field.

## Editing and deleting existing queries.

### Editing Queries.

This facility is only available to Administrators, or to the Owner of the particular query (see Permissions above).

If you have the correct permission the Edit and Delete buttons will be available otherwise they will be greyed out. All users are able to Copy a query which then makes them the Owner and they then have Edit control over that copied version of the query.

From the Merge Suite window select the query you wish to edit. Once selected, click the ‘Edit’ button and the Merge Query Detail window will open. The Query can then be edited. See “Creating a new query” for details of how to amend the query.

### Deleting Queries.

This facility is only available to Administrators, or to the Owner of the particular query (see Permissions above).

To delete a query, select the query that you wish to delete in the Merge Suite window and then click the ‘Delete’ button.



This will open a Dialogue box asking you to confirm whether you want to delete that query.

**Note:** Once a query has been deleted there is no way to undo the deletion.

## Copying Queries

Anyone can copy an existing query. To copy a query, select the query you wish to copy in the Merge Suite window by highlighting it, and then click the 'Copy' button.

Copy

This will open the Merge Query Detail window based on the selected query. The Owner of the query will be changed to the identity of the person who has copied it.

The screenshot shows the 'Merge Query Detail' window. The 'Query Name' field contains 'Change in Entitlement re DLA(1)'. The 'Owner' dropdown is set to 'ADMIN'. The 'Category' dropdown is set to 'Contact All my Cl'. The 'Sub Category' dropdown is empty. Under 'Selection', the radio button for 'Remove Duplicated Clients' is selected. The 'Include records where' dropdown is set to 'ALL'. There are two conditions listed: 1. 'Subject: Date Closed' is between '\* Runtime Condition \*'. 2. 'Subject: Code' is equal to 'WEL.NON.C' with a link 'Disability Living Allowance'. At the bottom, there are buttons for 'Indent', 'Outdent', 'Runtime Toggle', 'Add Condition', 'Delete Condition', 'Merge', 'Save', and 'Cancel'.

The name displayed in the Query Name field is the name of the query that was copied, but now has a '(1)' at the end – this is because in AIMS, all the queries must have a unique name. You are able to change the query name, and you may also wish to change the category listing so the query is saved in a different location.

## Creating a new query

From the "Create or Refresh" screen click on the "Create" button or use the keyboard alternative "Alt + A". This will open the "Merge Query Detail" window.

Query name: For identification by users if the query is to be saved for subsequent use.

The screenshot shows the 'Merge Query Detail' window with an empty 'Query Name' field. The 'Owner' dropdown is set to 'ADMIN'. The 'Category' and 'Sub Category' dropdowns are empty. Under 'Selection', the radio button for 'Allow Multiple Subjects per Client' is selected. The 'Include records where' dropdown is set to 'ALL'. The condition list is empty. At the bottom, there are buttons for 'Indent', 'Outdent', 'Runtime Toggle', 'Add Condition', 'Delete Condition', 'Merge', 'Save', and 'Cancel'.

A close-up of the 'Owner' dropdown menu showing the following options: ADMIN (selected), ADMIN, PW, and RC.

Each query has an 'Owner'. This person retains the user permissions described above. Use the drop down list to select an owner for the report – the default selection is that of the logged on user.

Category (compulsory) and Sub-category (optional) are used to determine the location of the query in the tree directory after it is saved. You can either select a choice from the drop down menu or create a new category by typing directly into the field.

Select between: Remove Duplicate Clients or Allow Multiple Subjects per Client.

The default setting is to "Allow Multiple Subjects per Client". You change to "Remove Duplicate Clients" by clicking in the radio button or alternatively use the arrow keys to switch between them.

If "Remove Duplicate Clients" is selected an information box will appear with the message "No subject or work done information (e.g. caseworker, diary appointments etc) will be available to the merge letters". Because one client can have more than one subject attached to their client record, they could appear in the mailing list several times, e.g. where the query is based on the condition "show all open subjects". By selecting "Remove Duplicate Clients" the client will appear only once in the mailing list. The message serves as a reminder of this.

The warning is given at the point of creating the mailing list, but its effect will only be noticed when attempting to merge a letter with that list. Any merge letters that contain fields requiring subject information (e.g. the caseworker or date of next appointment) will be unable to complete the merge process and a message will appear saying the field is not available.

Allowing Multiple Subjects per client means that the merge letter can distinguish between the various subjects, and it would be possible to generate letters that included subject specific data. However if using this option it is possible that one client could receive multiple letters in the mail merge if they have more than one subject meeting the query conditions.

Select the conditions required to identify the client and/or subject information you want in the query. Conditions in the Merge Suite work in exactly the same way as Report Conditions in the Reporting module. See "**Report Conditions**" section of the help guide for a full explanation.

### **Saving a query**

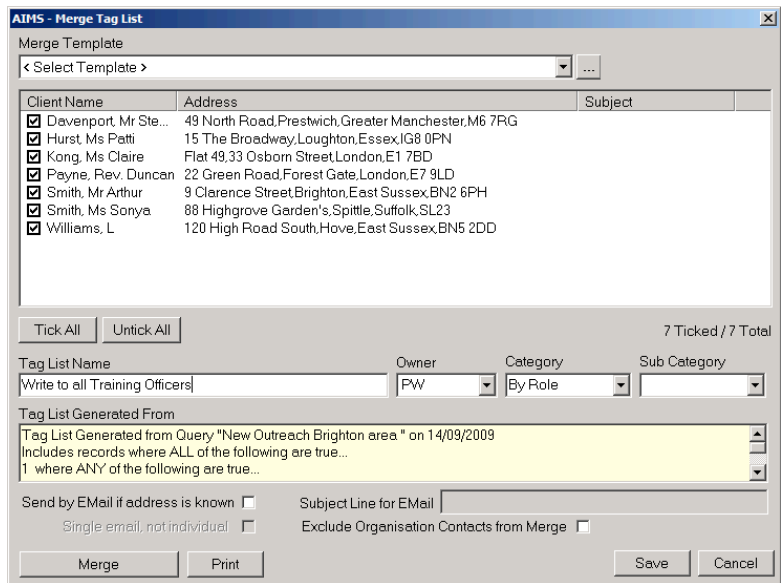
Once the conditions have been set you can save the query in which case the query will close and you will be returned to the "Create or Refresh" screen where the saved query will be available for use at any time.

To run a saved query (i.e. generate a Tag List) either highlight the required query and click the "Run" button or double click the query.

### **Running a query**

Clicking on the "RUN" button will generate the merge list which will be displayed in the "Merge Tag List" window.

The “Merge Tag List” is the result of having run the query, and is a distinct and separate item from the query used to produce it.



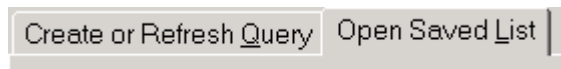
It is now possible to either save the list or merge the list with a letter. See the earlier entries in this section.


### Returning to a saved list

A saved Mail Merge list contains a snap shot of who was selected at the time the query was run. If the original query was run again, even after a short period had elapsed, it is probable that a different set of clients would be selected, i.e. as dates and other information would have changed over time.

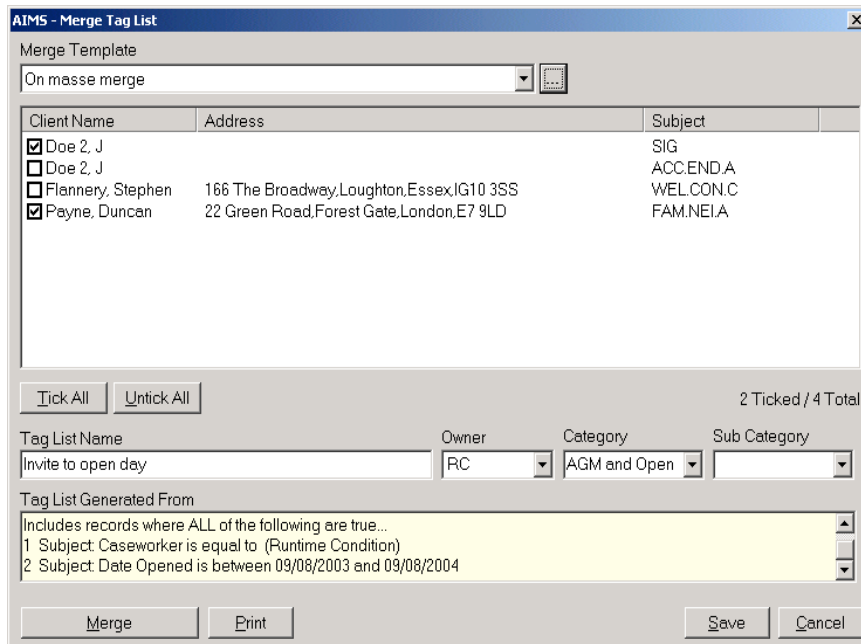
Returning to a saved list enables you to do more work with the original selection of people, e.g. write them a follow up letter, or tick off those names that replied to the first letter.

Click on the “Open Saved List” tab at the top of the screen. Click on the Open a saved list tab at the top of the screen or use the Alt + L keyboard shortcut.



Queries are saved under their category name which is displayed in a tree directory format. By clicking on the  sign to the left of the name of the category you can view any queries that have been previously created and saved in that directory. The tree directory can be expanded to include one further sub-directory.

Highlight the query of your choice by clicking with the mouse or using the arrow keys to open and close the tree directory. Once the query is selected the Edit, Copy and Delete buttons become available.



Edit allows you to make various alterations within the Tag List. Names can be ticked (will be available to be merged) or un-ticked (not available to be merged). A new Merge Template letter can be selected. The list name and category can be amended.

Copy will take a copy of the Tag List. The Owner of the Tag List will be changed to the identity of the person who copied it. The name of the Tag List will be appended by a (1) – this is because AIMS requires all names in the list to be unique. You may wish to change the name and location at this time.

Delete will permanently delete the Tag List. It is not possible to retrieve a Tag List once deleted.

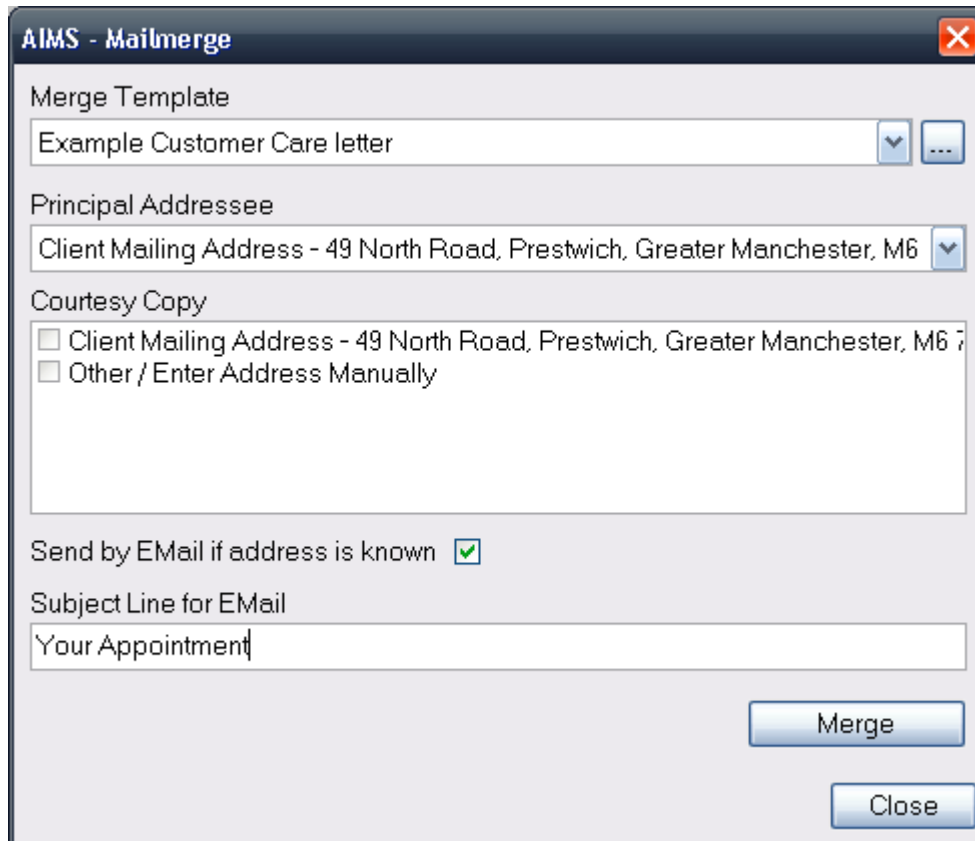
This feature requires MS Outlook to be installed on your computer.

The Mail Merge option in AIMS will allow you to send your merge documents via email when the client has an email address. When you select the merge to email option, if an email address exists for the client in the database, an email containing all the details of the merge template will be created in the drafts folder in Outlook. You can then open these emails and edit them before sending.

AIMS Mail Merge can be used in two areas, individual mail merge (from the Client History Screen) and also through the MergeSuite (which is only available in AIMS Extra).


### Individual Merge to email

1. To send an individual email to a client using one of your merge templates, click on the mailmerge button in the bottom left corner of the Client History Screen (CHS). You will see a screen similar to the one below.



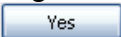
The screenshot shows a dialog box titled "AIMS - Mailmerge". It contains the following fields and options:

- Merge Template:** A dropdown menu showing "Example Customer Care letter" with a downward arrow and a three-dot menu icon.
- Principal Addressee:** A dropdown menu showing "Client Mailing Address - 49 North Road, Prestwich, Greater Manchester, M6" with a downward arrow.
- Courtesy Copy:** A section with two checkboxes:
  - Client Mailing Address - 49 North Road, Prestwich, Greater Manchester, M6
  - Other / Enter Address Manually
- Send by EMail if address is known:** A checkbox that is checked.
- Subject Line for EMail:** A text input field containing "Your Appointment".
- Buttons:** "Merge" and "Close" buttons are located at the bottom right.

2. You will see that there is a checkbox labelled "Send by Email if address is known". When you check this box, the "Subject Line for Email" field will become available. Type a subject message for your email. Now click the  button.

- Depending upon how your version of Outlook is setup, the following message box may appear:



- You should tick the box to allow access and select an amount of time in the drop down. If you think you may be doing a lot of merge to email it might be worth selecting the maximum (10 minutes) so that the message does not appear again. Click  to continue. If you click no to this message AIMS will show an error message saying that the operation was aborted and the merge will fail.
- If the client has an email address in their client details an email will be created in the Drafts folder in Outlook. You can then open and edit this in Outlook if required and then send it to the client. If the client does not have an email address, a standard Word merge document will be created.

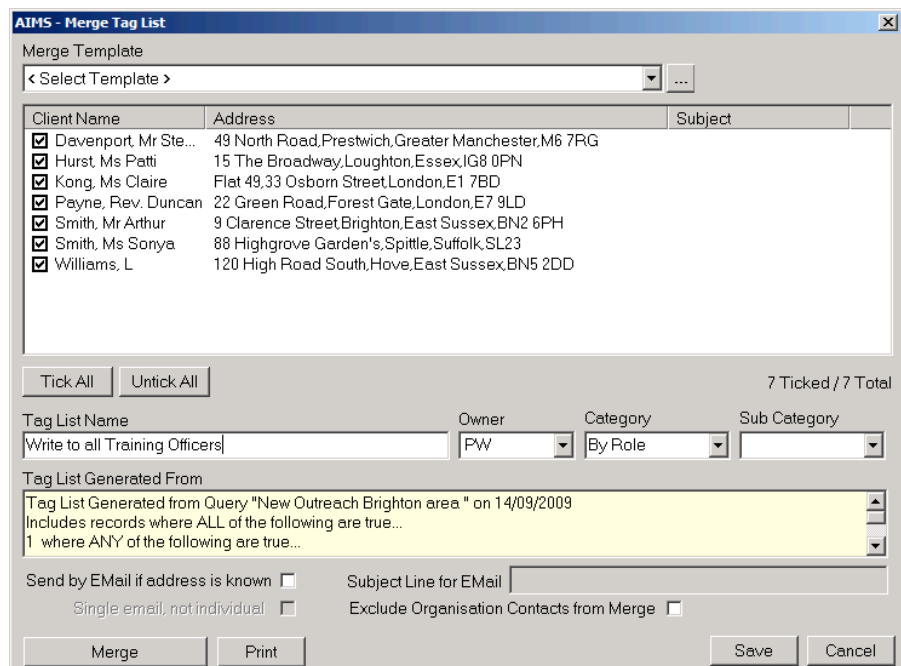
## Merge to Email in MergeSuite

This feature is only available in AIMS Extra.

- Using MergeSuite you can send emails en masse to groups of clients in your database. This works in a similar way to the individual mailmerge with the same check box option to “Send by Email if address is known” and a “Subject Line for Email” field.

**Note:** If your MergeSuite query is set to Allow Multiple Subjects Per Client and you do not untick the duplicates, an email will be created for each of the clients subjects.

- Once you click the Merge button, the function will work in the same way as above and emails will then be created in the Outlook Drafts folder.



3. If your tagged merge list contains Organisational records and those organisations have multiple Contacts, these contact will all appear in the list. You may wish to amend your selection criteria to only display certain contacts with specific roles. Alternatively you could select the “Exclude Organisation Contacts from the Merge” by ticking the appropriate box at the bottom of the screen. This will leave you with only the Organisations and no personalised contact details i.e the organisation address only.

## Conversion Tables

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### **Purpose of Conversion Table function**

Agencies are sometimes required to report to different bodies (e.g. a project funder or their network headquarters) using a different classification scheme than the one they normally use. The AIMS Conversion tool will enable agencies to continue collecting data using their main classification scheme, and at the same time set up reports that converts that data into the format required by someone else.

### **Opening the Conversion Table**

N.b. From Version 3600 released in September 2008 the conversion tables mentioned below no longer work. The STATS codes mentioned in this section have been renamed in the database and are now called Advice Detailed. In all other respects they are the same as the STATS codes. You can however still create your own new tables.

From the top menu bar go to Reports and then Conversion Table, a form will appear like the one below. This is an existing conversion table which has already been configured in the system. Several such conversions exist and you can view them by clicking on the “Conversion Table” drop down box.

The conversions that have been pre-configured are as follows:

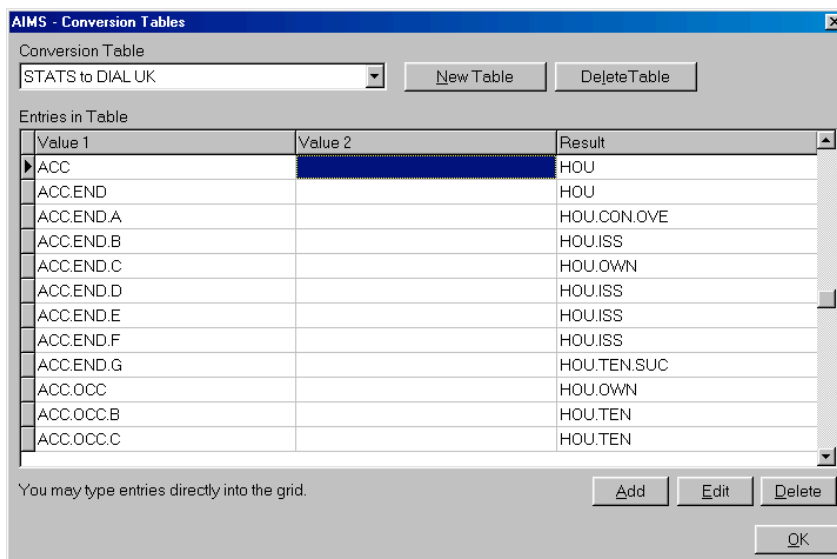
Lasa STATS Subject Codes	>	DIAL UK Codes
Lasa STATS Subject Codes	>	YOUTHStats
Lasa STATS Subject Codes	>	NACAB Social Policy Codes

You can edit any of the existing Conversion Tables should you need to. For instance, as you add, edit or change the contents of your main classification scheme by adding a new classification term, (in the Configuration > Coded Fields screen) you might also then want to make an adjustment in one of the pre-configured conversion tables.

### **Understanding how the Conversion Tables work**

By selecting a coded table that already exists in the database it is possible to “map” one or more codes from one table to another classification scheme. In the example below, STATS codes are shown in the Value 1 column and the result column comprises DIAL UK classification terms.

Wherever ACC (Accommodation) appears in the STATS classification within the AIMS database it will report as HOU (Housing) if you were required to produce a report using the DIAL UK terminology.



Not all codes need to be matched or mapped. In a tiered classification scheme the lower tiers will report upwards unless otherwise instructed.

E.g.

ACC Accommodation

OCC Occupancy

A Mortgage

As an example:

The STATS Code “ACC.OCC.A” which stands for Mortgage Problems has no direct equivalent in the DIAL UK scheme. Instead the ACC.OCC.A code will report upwards to the tier above it ACC.OCC which is mapped to an equivalent code in the DIAL UK system, that of HOU.OWN Housing Ownership problems.

In this example if two Stats codes one ACC.OCC and one ACC.OCC.A existed in the STATS classification they would report as 2 HOU.OWN problems in the DIAL UK Scheme.

### The STATS classification and the Value 2 column

Because the STATS classification uses a second coded field called the Cross Subject (or X Subject) to identify certain types of problems e.g. Debt, it is necessary when mapping codes between STATS and any other classification scheme to sometimes add a Value 2 (the X Subject) to make an accurate match.

E.g. With an attached Cross Subject code

Value 1	Value 2	Result
ACC.OCC	B	DEB.HOU
(Housing Occupancy)	Debt	(Debt Housing)

E.g. Without an attached cross subject code

Value 1	Value 2	Result
ACC.OCC (Housing Occupancy)		HOU.OWN (Housing Ownership)

Where a classification scheme does not make use of the additional cross subject code you will not need to complete the Value 2 section of the form when building a new conversion table. See below.

### **Building a new conversion table**

You may need to build new conversion tables to meet specific local requirements. For instance if you want to use your main classification scheme to report to a new funder who uses a different breakdown of Ethnicity.

Click on the “New Table” button on the Conversion table’s main screen. The New Conversion table pop up box will appear.

Give the new conversion table a name that you will be able to identify later. This name will appear in the reporting module when you are constructing the layout of the report which will convert the main classification into the one being generated.

Conversions can be based on either “codelists” or “strings”.

- 1.1. A codelist is an existing coded table within the AIMS database. Both the original code and the one you want to map to may already exist in the AIMS database. If so select Value 1 as classification code list you are using to currently collect data by, and select the code list you wish it to be converted to as the Output Type.

Please note, the classification scheme codes attached to the records in your database are not altered by this process. The information is only altered when running reports based upon fields that have been converted and where the “convert” function has been selected. See the report Writing guide.

- 1.2. A String is not based on an existing coded table within the database. Instead it is created by you writing the output you wish to see directly into the Output Value field at the time you create the conversion table. In this way, existing coded fields can be converted to “string” values that do not need to be coded fields in their own right.

Select Value 1 Type (either Codelist or String) select Value 2 type (see discussion above) or leave blank if no value is required, and then select Output Value (either string or Codelist). Then Go OK.

You will now be able to create your conversion table based on the value types you have selected using the Add button.

**AIMS - New Conversion Table**

Conversion Table Name

Value 1 Type:  Value 1 Codelist:

Value 2 Type:  Value 2 Codelist:

Output Type:  Output Codelist:

A conversion table takes one or two values as input and, using the entries in the table, converts the input values to a single output value.

Use this form to specify the type of fields that will be used for input and output. If the fields are coded, select the name of the codelist to assist data entry later.

## Adding or Editing Codes

You can add new codes or edit existing codes by selecting the Conversion table from the drop down selection.

To add or edit a new code click on the ADD button or Edit button having highlighted the line you wish to select, and a pop up table will appear like the one below.

Where the Output Value is a "string" the Result box will be blank and you will be able to write directly into it.

**AIMS - Conversion Table Detail**

Value 1:  Value 2:

Result:

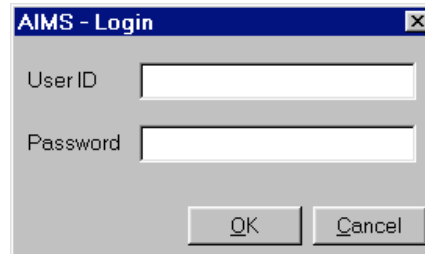
## Managing Users

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Only Users with Admin level user permissions will be able to access the functions described below.

### The Purpose of the Log In User ID

Within the AIMS database system users identified via their log in User ID. AIMS will information to designate ownership of events to that individual. For instance, the be used by the system to identify who appointment, which advisor last worked on case, and who will be assigned the next the Action Manager lists.



The image shows a dialog box titled "AIMS - Login". It contains two input fields: "User ID" and "Password". Below the fields are two buttons: "OK" and "Cancel".

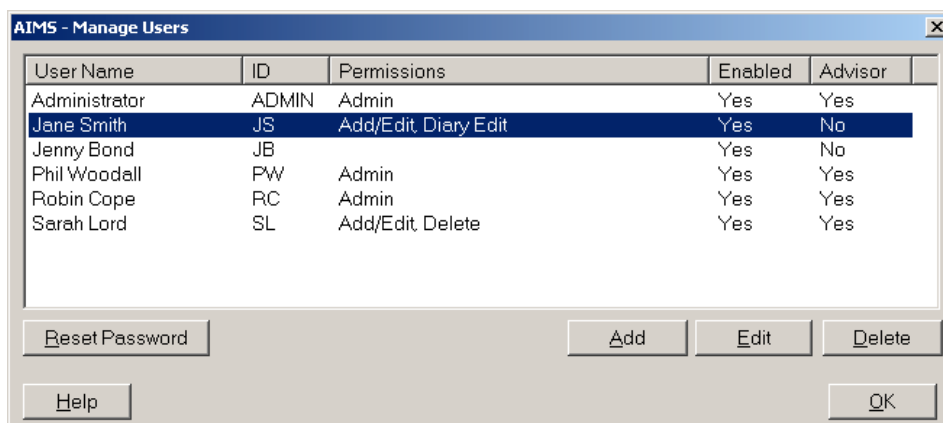
will be use the certain key User ID will made a Diary the client's action from

When you log into AIMS only those Action Manager tasks and Diary appointments associated with that Users log in details will be displayed on the Welcome screen.

Anyone wishing to identify their work separately from other people in the organisation should have their own User ID. If you do not need to do this then it is possible for several people to log on using the same identifier, e.g. ADMIN. This does mean however that everyone logged in as ADMIN will see all the tasks associated with the ADMIN team.

### Adding new users to AIMS - (AIMS Access & AIMS Firebird only. AIMS MS SQL users see relevant section below).

1. From the Menu bar select "Admin" and then select "Manage Users". **The first time you do this the only system user will be ADMIN.** The window shown below will appear:



The image shows a dialog box titled "AIMS - Manage Users". It contains a table with the following data:

User Name	ID	Permissions	Enabled	Advisor
Administrator	ADMIN	Admin	Yes	Yes
Jane Smith	JS	Add/Edit, Diary Edit	Yes	No
Jenny Bond	JB		Yes	No
Phil Woodall	PW	Admin	Yes	Yes
Robin Cope	RC	Admin	Yes	Yes
Sarah Lord	SL	Add/Edit, Delete	Yes	Yes

Below the table are several buttons: "Reset Password", "Add", "Edit", "Delete", "Help", and "OK".

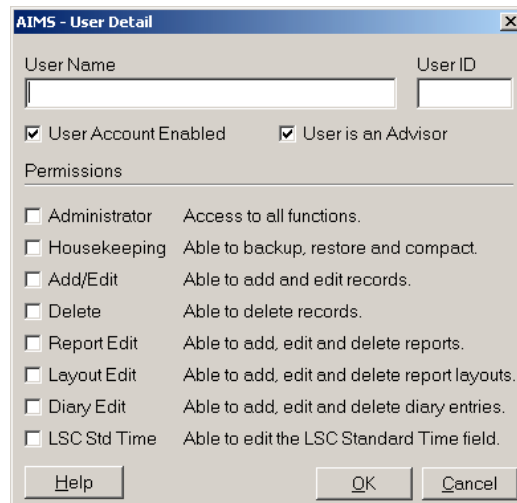
## Note

It is possible to differentiate between people who are logged on as Advisors / Caseworkers and others who need access to the system for administration or other non-casework activities. For AIMS Extra users, if the person logged on is not an Advisor / Caseworker, they can still be associated with Diary appointments or be included in the Action Manager, but will not be available for inclusion under subject or work done entries.

2. Click on the Add button or use the Alt A keystroke to start adding new users. This box will appear.

## Note:

Firebird system users will be asked for their Firebird Server administrator log in details. Organisations are responsible for their own Firebird Server administration (including back up procedures), but if the password has not been altered the log in will be Sysdba and the password is Masterkey.



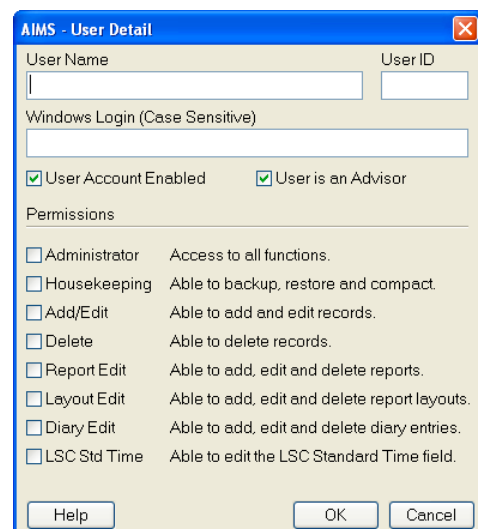
The screenshot shows the 'AIMS - User Detail' dialog box. It has two input fields: 'User Name' and 'User ID'. Below these are two checked checkboxes: 'User Account Enabled' and 'User is an Advisor'. A section titled 'Permissions' lists several options, each with a description and an unchecked checkbox: Administrator (Access to all functions.), Housekeeping (Able to backup, restore and compact.), Add/Edit (Able to add and edit records.), Delete (Able to delete records.), Report Edit (Able to add, edit and delete reports.), Layout Edit (Able to add, edit and delete report layouts.), Diary Edit (Able to add, edit and delete diary entries.), and LSC Std Time (Able to edit the LSC Standard Time field.). At the bottom are buttons for 'Help', 'OK', and 'Cancel'.

## Adding new users to AIMS - AIMS MS SQL

In **AIMS MS SQL**, the User Detail screen or procedure for adding users is slightly different depending on whether you opted to use Windows authentication or not when AIMS was installed.

### AIMS installed WITH Windows Authentication

Where AIMS MS SQL was installed with Windows Authentication (recommended option), **the AIMS administrator will need to know the Windows Login for all the users that need to be added to AIMS.** Please note that Windows Logins are **Case Sensitive**.



This screenshot shows the 'AIMS - User Detail' dialog box with Windows authentication options. It includes the 'User Name' and 'User ID' fields, plus a 'Windows Login (Case Sensitive)' field. The 'User Account Enabled' and 'User is an Advisor' checkboxes are checked. The 'Permissions' section is identical to the previous screenshot, listing Administrator, Housekeeping, Add/Edit, Delete, Report Edit, Layout Edit, Diary Edit, and LSC Std Time. Buttons for 'Help', 'OK', and 'Cancel' are at the bottom.

When a Windows user that AIMS *does not* recognise tries to log in, then the user is asked for their AIMS user id and password. This means that when AIMS is first installed people can log in with the ADMIN + Password combination. They must have been given access to the AIMS database in Microsoft SQL Server first, though.

When a Windows user that AIMS recognise tries to log in, they are logged in automatically without having to enter their password. If they choose to log in again from the menu, however, then they have to enter their AIMS ID and password. It also means that someone can log in as another user once the first connection is made, if they know or guess the password. For this reason it is still important that people change their passwords from the default "PASSWORD".

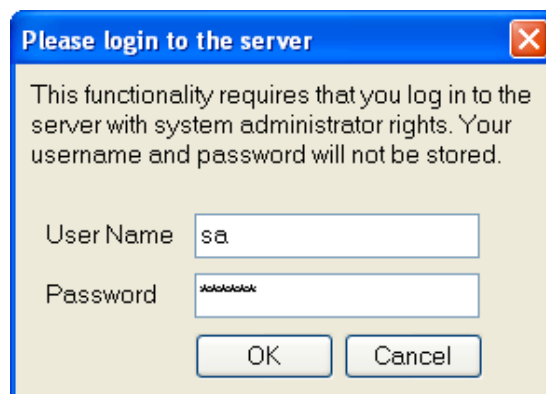
In order for AIMS to recognise someone from their Windows Login, that login must be added to the user table in Manage Users. When Windows authentication is turned on an extra field is visible where you can type in the windows login (the user name you use when you start windows, e.g. jsmith). If this field is not filled in then the user will always be prompted for a login.

E.g.   AIMS User Name   =   John Smith  
      AIMS User ID       =   JS  
      Windows login     =   jsmith

### **AIMS installed WITHOUT Windows Authentication**

If you chose **not** to use Windows authentication when installing AIMS (not recommended), the AIMS user detail screen will **not** have a Windows Login field (i.e. it is identical to the User Detail screen in AIMS Access).

When adding a new AIMS User you will be asked to login to the Microsoft SQL server with system administrator rights each time you wish to add a new user in AIMS. **This requires that you know the User Name and password for the Microsoft SQL server on which the AIMS database resides.** This information will not be stored in AIMS. However AIMS will manage Microsoft SQL Server Logins for you, so that users added to AIMS will also be able to connect to the Microsoft SQL server on which the AIMS database resides.



## Granting Users security rights.

3. First complete the new users User Name. The User Name should be the user's normal name. This will be used by AIMS for generating reports, mail merges, attendees at a meeting, etc.
4. Now select a User ID. This is what will appear in the database against records that display who owns the action or undertook the task.
5. Select the User ID carefully, so that you can be sure of identifying who the worker is at a later time from the User ID alone. It is not possible to have two User ID's which are the same.

### Note

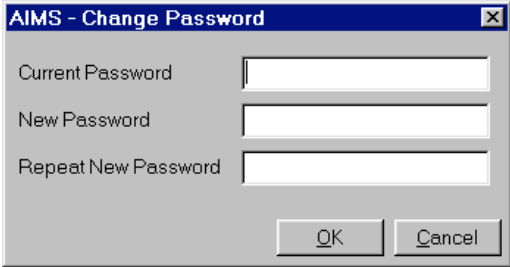
Once you have completed a User Detail form and clicked 'OK' you will be able to edit all the details with the exception of the User ID which cannot now be changed.

6. The User Account is by default set to "Enabled". If at some point in the future an adviser leaves the organisation you should edit the account so that no new actions can be entered against that User ID. This is done by un-checking the User Account Enabled tick box.
7. Tick the appropriate permissions required for that system user. The Administrator function has access to all rights. For users with fewer rights not only will they not have access to those functions, but buttons or screens where they have no permissions will be unavailable or not visible (e.g. the delete button is not available on the client screen for users who do not have delete permissions).

## Changing the password

When first activated the password for ADMIN is PASSWORD, for all new users added to the system the initial password is PASSWORD.

1. To change a password you must be logged in as the user you want to change.
2. Go to the Menu bar select "AIMS" and then select "Change Password". This box will appear.



The image shows a standard Windows-style dialog box titled "AIMS - Change Password". It features three text input fields stacked vertically, labeled "Current Password", "New Password", and "Repeat New Password". At the bottom of the dialog, there are two buttons: "OK" and "Cancel". The dialog box has a blue title bar and a close button (X) in the top right corner.

3. First type in the old password, then on the next two lines below type in your new password. The password and User ID are not case sensitive.

4. A dialogue box will inform you that you have been successful in changing your password.

### **Resetting a User's password**

1. If a user forgets their password it is possible for another user with Administrative access to reset that user's password to PASSWORD.
2. From the Menu bar select "Admin" and then select "Manage Users".
3. When the Manage Users window opens, select the user who has forgotten their password and click Reset Password button.
4. A pop-up box will open asking you to confirm that you want to reset the user's password to Password. Click the 'Yes' button if you wish to do so.
5. The user can then change their password by following the procedure described under the section "changing the password" above.

## Changing Configuration settings in AIMS.

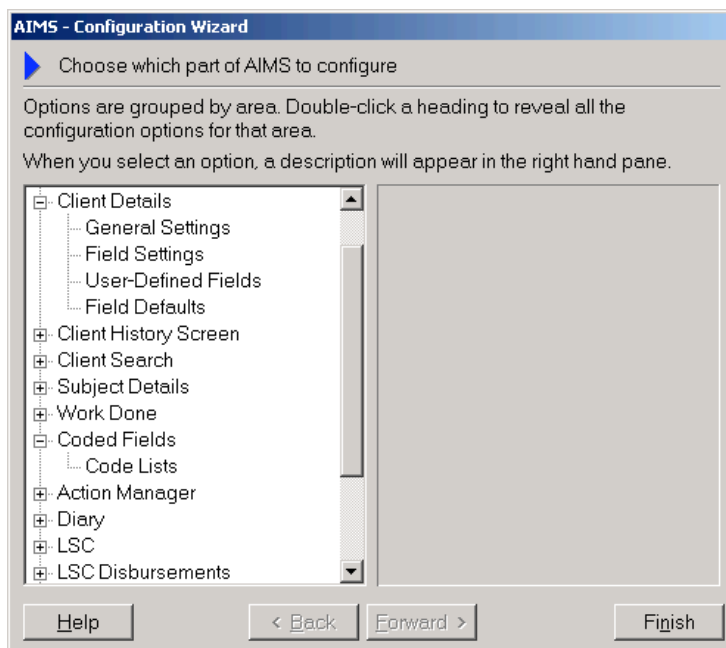
Only Users with the appropriate access rights will be able to access the functions described below. Configuration enables Systems Administrators to make alterations to the AIMS data tables. Great care should be taken before commencing Configuration and you are advised to take a back-up copy of the data file, aims.mdb before you make any changes.


### Overview


Within AIMS it is possible to alter the initial configuration set up to better meet the particular needs of your agency. Each screen or function will have some element of configurability. How much can be configured depends on the individual function. When proceeding through the Configuration Wizard you will see that certain options “grey out” or disappear altogether. This means that for that particular field or function the greyed out option is not available.

### How to open the Configuration Wizard

1. From the Menu Bar select “Admin” and then from the drop down list select “Configuration Wizard”. You can also use the Alt M keystroke. A screen like the one below will appear.



2. The Configuration Wizard displays the screens and functions in the form of a tree directory. By clicking on the  sign to the left of the screen or function description, you can view additional details related to that screen or function.

In the example above the Client Details screen has been opened and now displays a  against the screen descriptor and also shows the additional information of “Field Settings” and “User-Defined Fields”.

This means that for the Client Details screen three types of configuration are possible:

- i) Field Settings (the properties that can be related to a field, see later), ii) User-Defined Fields (the ability to create your own fields to add to that particular screen) and iii) Field Defaults (the ability to automate certain data entering fields).

Note that the exact choice of what can be undertaken will vary for each screen or feature. For example, the Coded Fields function slightly lower down the Tree Directory has a different set of choices available to it.

## Global Settings

The Global settings screen is where you enter your organisation name and select the Principle Classification Scheme that you will be using within AIMS. For a discussion of the issues behind selecting a principle classification scheme please see the Pre-Configuration Guide. This should be available in the directory where the AIMS software is installed in a subfolder called “documentation”.

The screenshot shows a dialog box titled "AIMS - Configuration Wizard" with a sub-header "Change global settings". It contains the following elements:

- Organisation Name:** A text input field containing the text "Lasa".
- Principal Classification Scheme:** A group of radio buttons with the following options:
  - Stats Codes
  - Advice NI
  - Span Codes
  - Nacab Classification
  - Youth Access Codes
  - Create Own Classification
  - Dial UK
- Notes:** A text label stating "NB You can only change scheme when the database is empty."
- Buttons:** A "Save" button is located to the right of the radio button group. At the bottom of the dialog are four buttons: "Help", "< Back", "Forward >", and "Finish".

## Creating your own Classification Scheme

AIMS comes with a choice of five preset classification schemes from which you can select one, or you can opt to create your own or you can modify one of the existing schemes.

If you wish to create your own classification scheme, when configuring global settings, (see above), select the option “Create Own Classification”.

Whether you choose to modify an existing scheme or create your own classification you will need to create or edit a coded list.

To do this, open the configuration wizard and select “code lists” from coded lists in the left hand pane. Then either create a new code list, or edit an existing code list for your chosen classification scheme. More information on creating and modifying code lists is given in the sections How to Create a Code List and How to Edit an Existing Code List below.

### **Note**

When creating your own classification schemes or amending an existing classification within AIMS it is important to bear in mind some basic rules. Below is a guide to things to consider:

#### ***Ensure data is Reportable***

All topics being identified should have one and only one logical place where they are to be recorded or live within your classification scheme.

The classification scheme should facilitate the easy reporting of the information, by ensuring that fields are created and placed in the correct part of the system, and by not confusing different types of information within the same field.

E.g. Going to a Tribunal is a description of the work you did not the problem the client brought to the agency.

Using numbers at the start of your code can cause trouble later on when trying to report on your data, as a computer will see the list order as “One Ten Eleven Two” and not 1, 2, 10, 11.

See the section on tiering below for further explanation of how to ensure information can be reported.

#### ***Is the classification Scalable?***

The classification should be able to grow over time, or adapt to changes in circumstances.

As new benefits are brought in will your scheme be able to fit them in, or have you used a classification that cannot be expanded without breaking the logic inherent in your scheme.

E.g. If you use the first letters of the alphabet make sure that only 26 categories of what you are describing exist.

#### ***Are the codes Easy to use?***

The code should be easy to remember. But just using the first few letters of the thing you are describing does not always work (see tiering, as well as the example below).

Do you want the most frequent answer to be first in the list? Is this possible without breaking the coding logic?

Try to avoid codes that are easily confused with each other e.g. IO and I0 (One and zero and Letter I and letter O).

E.g. 7 out of 10 of your users are Male. What code list might you use?

Example 1  
M = Male  
F = Female

Example 2  
A = Male  
B = Female

Example 3  
1 = Male  
2 = Female

The codes in example 1 are memorable, but the “F” for Female will appear first in the alphabetical listing and will require users to make an extra key stroke to select the most common answer. Examples 2 and 3 are less memorable but would display in the more useful order.

### ***Tiering***

The term ‘Tier’ refers to the structure of the classification system used in a coded field. If a coded field has a ‘tiered’ structure, for example B = Black and B1 = Caribbean B2 = African, then the tier is comprised of sub-sets of the higher level data. In our example Caribbean and African are both components of the overall category B = Black.

The benefit of tiering is when you report on the data it is possible to select either all the categories that start with “B” (i.e. all Black clients regardless of the more detailed information), or alternatively to report on the full list in detail showing the constituent parts of the Black client group.

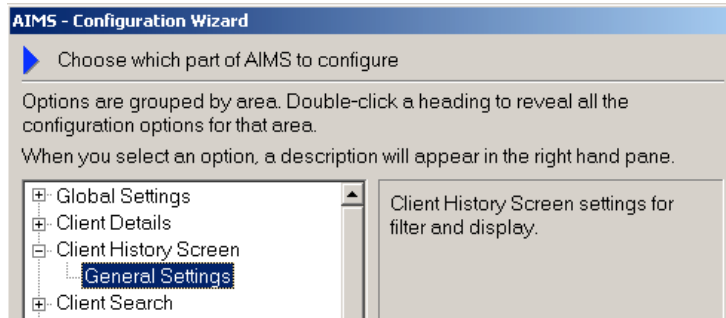
To make tiering work it is important that the scheme maintains its integrity by keeping the length of the tier the same within that category. In the example below “B” equals a single letter tier for Black but White is using a 2 letter tier “WH”. This mix of tiering would make reporting across the classification impossible.

E.g. B = Black  
B1 = Caribbean  
WH = White  
WHEN = White English

## Configuring the Client History Screen

The Configuration Wizard allows you to configure options available to users on the Client History Screen.

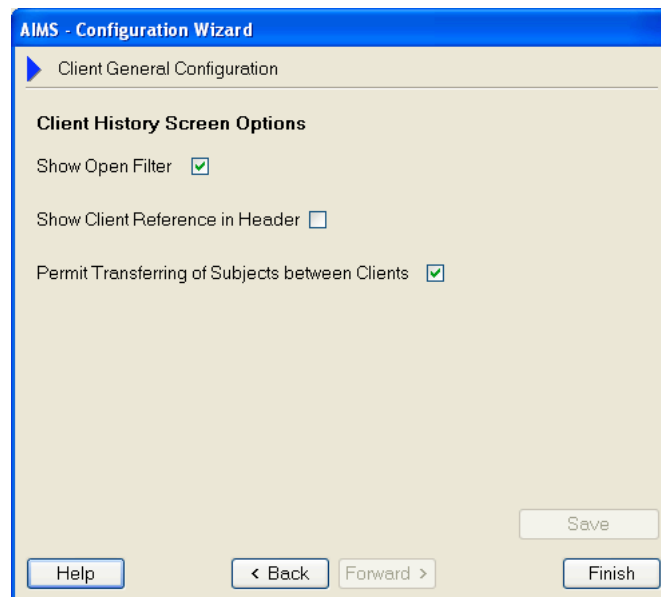
To access the Client Configuration Screen from the Configuration Wizard, click on the  sign next to Client History Screen and select General Settings.



Then click on the Forward button.



This will open the Client General Configuration screen shown below



Depending on which options are ticked in the client General Configuration Screen, various buttons and filter options will be available in the Client History Screen.

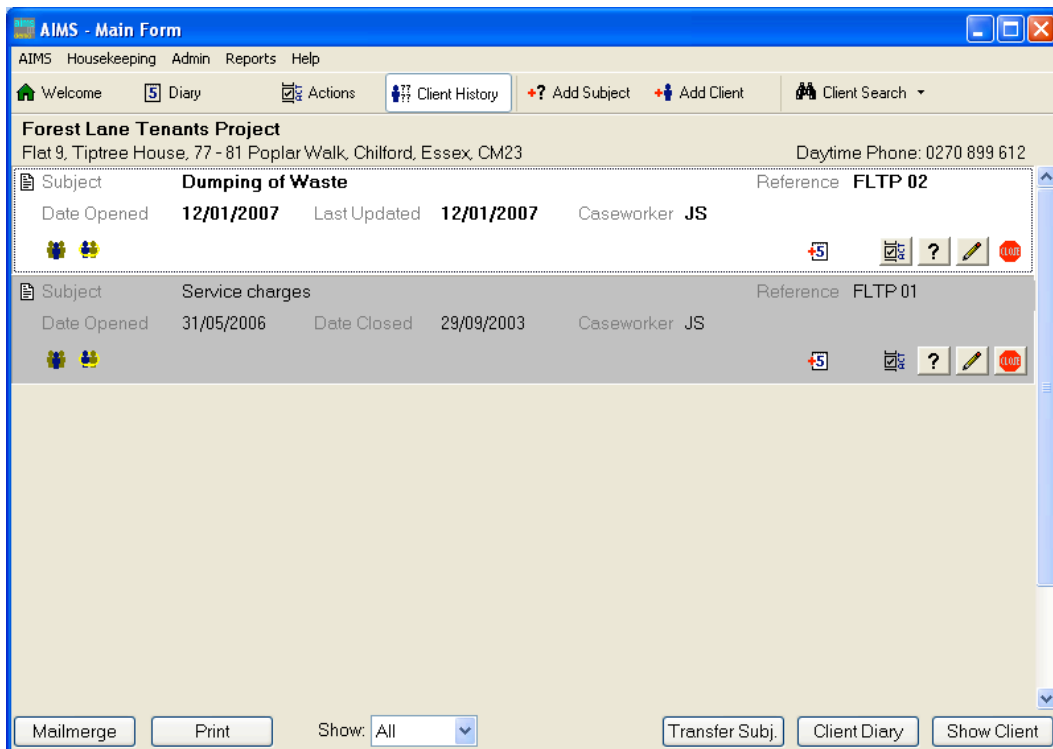
- **Show Open Filter** – when ticked you can elect to show only open subjects in a particular client's client history screen

- **Show Client Reference in Header** – when ticked the client’s reference number will be displayed in the subject header (i.e. you do not have to go into the client’s record via the “show client” button to see this information)
- **Permit Transferring of Subjects between Clients** – This is an administrator level permission which gives users with admin permissions access to the Transfer Subj. button on the client history screen



Once relevant options have been selected, click on the Save button to save any changes. Click on the Finish button to leave the Configuration Wizard or the Back button to return to the main Configuration Wizard screen and configure more options.

An example of the Client History Screen configured with all options ticked is shown below.



## Using the Configuration Wizard.

1. Advice and guidance is available within the Configuration Wizard, and will give you clues as to what changes are permitted. Permitted changes can alter both between different screens and functions and also within the same screen or function. For instance, in the Client Details field settings screen shown below, although both 'Title' and 'Post Code' are fields in the same list, one can be turned off and the other cannot.
2. At the bottom of the Wizard you will see four buttons. The middle two buttons 'Back' and 'Forward' will move you through the configuration wizard.



You can only use the Back and Forward buttons when you have highlighted one of the configuration options associated with the screen or function description. i.e. highlight "Field Settings" to activate buttons not 'Client Details'.

3. The 'Finish' button will take you out of the Configuration Wizard altogether.

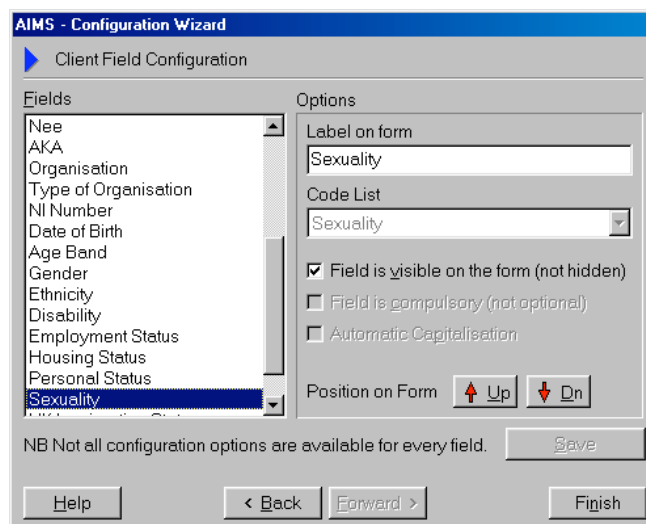



It is important to remember to go 'Back' when you want to make further changes, rather than finish making the changes and exit instead by accident.



## Understanding the right hand "Options" pane.

1. As you progress through the Configuration Wizard and select different screen or function settings, you will be offered different choices in the right hand options pane. The particular configuration options associated with that field or function are stated in the right hand pane and can be read before you decide to click the 'Forward' button.



2. The heading next to the arrow in the top left hand corner tells you which field set you are looking at (Client Field in the image on the next page). The right hand pane contains a number of its own fields, tick boxes and Up and Down arrow buttons. This is where you can change settings such as 'Visible' and 'Label' for the fields in the left hand pane.
3. It is very important to 'Save' every time you make an alteration.  Each field within the Client screen configuration needs to be saved before moving on to configure the next client screen field.

### Note



If you go 'Back' to the Fields list before having saved the changes you made they will not take effect.

### Specific types of configurability.

1. **Labels** (i.e. field names) can be altered. Where the original label is not greyed out in the 'Label on form' field, users can change the field name by placing their cursor in the active field and overwriting the entry. Any replacement entry will appear on the appropriate AIMS screen in place of the original.
2. **Code Lists** are attached to a coded field. They are the list of drop down choices that will be available to that particular field. How these are altered or selected will be dealt with below. Where the Code List is greyed out, you cannot undo the connection between that field and the associated Code List. In the example above, 'Sexuality' allows only the label to be changed not the code list attached to the 'Sexuality' field.
3. **Field is visible on the form** (not hidden). Ticking this box keeps the field visible.

### Note

If a field is un-ticked (i.e. a field that was visible is hidden) all the information that has been previously entered into that field is still saved within AIMS.

4. **Field is compulsory** (not optional). If the field is visible then for some fields you have the additional option of making it compulsory. Consider carefully before making a field compulsory as a record will not be able to be closed until all compulsory fields have been completed and required information may not always be available at the point of first capturing the data.
5. **Automatic Capitalisation**. Ticking the box will ensure the field corrects data so that words are capitalised, e.g. will not permit the entry "LASA" for instance, but return "Lasa" instead.
6. **Field value must be unique**. Ticking this box will prevent users from creating a duplicate entry, e.g. giving two clients the same reference number.
7. **Position on Form**. In some of the screens certain fields   can be displayed in different orders i.e. by moving the field position up and down the list they will appear higher or lower on the associated page. You may wish to display those fields you capture information on most frequently higher up the list and demote

or even switch off (hide) the ones you don't use. Use the Up and Down arrows to change the position of the fields in the left-hand pane.

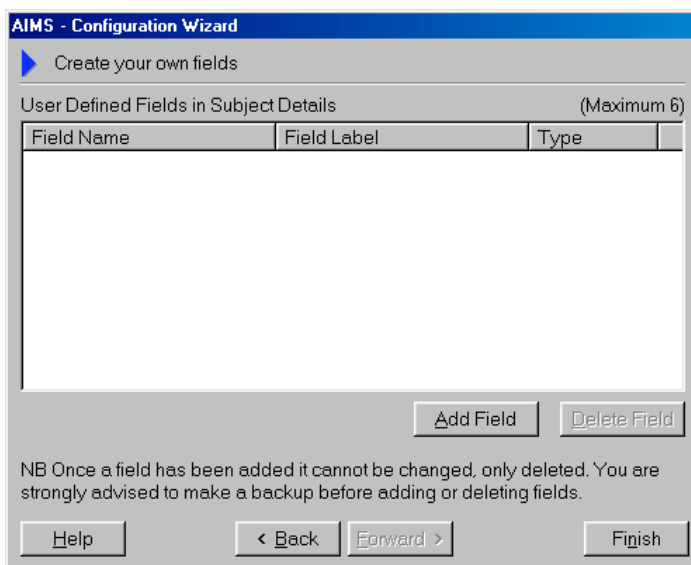
## How to create a User-Defined Field

1. User-Defined Fields are blank fields that have no function ascribed to them, and they do not appear in the database until they have been configured. It is possible to add user defined fields at four different locations within AIMS (**Client Details, Subject Details, Work Done** screen) but each location is limited by a fixed number of new blank fields that can be added.
2. It is important to ensure that the nature of the information being captured by the new user defined field corresponds to the location it has been added to e.g. only add further client data collection fields to the client details screen. Any Subject information captured here would not be able to report against the appropriate data set.
3. When you open the User-Defined Field the pop up box above will appear. The location of the new fields and the maximum number that can be created is shown in the header information. Once new fields are created they will appear in a list format in the blank area of the screen and you will be able to select them subsequently for editing or deleting purposes.

4. Click 'Add Field' or use the Alt A keystroke and the pop up box below will appear. From here you can Name the field (the label which will

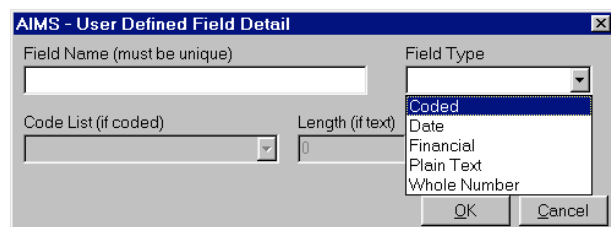


appear on the AIMS data entry screen), specify what type of field (e.g. coded, date etc.), attach a Code List to that field, either one you will write yourself or an existing

A screenshot of the "AIMS - Configuration Wizard" dialog box. The title bar reads "AIMS - Configuration Wizard". Below the title bar is a blue bar with a right-pointing arrow and the text "Create your own fields". The main area is titled "User Defined Fields in Subject Details (Maximum 6)". It contains a table with three columns: "Field Name", "Field Label", and "Type". The table is currently empty. Below the table are two buttons: "Add Field" and "Delete Field". At the bottom of the dialog are four buttons: "Help", "< Back", "Forward >", and "Finish". A note at the bottom reads: "NB Once a field has been added it cannot be changed, only deleted. You are strongly advised to make a backup before adding or deleting fields."

code list. If you have chosen the user defined field to be a text field you can specify how many characters will be allowed in that field up to a maximum of 100.

5. Every field you create must be given a Field Type characteristic, i.e. only that type of data will be accepted by that field for data entry purposes. Coded fields will appear as drop down combo choice fields for data entry purposes when they appear on your system.

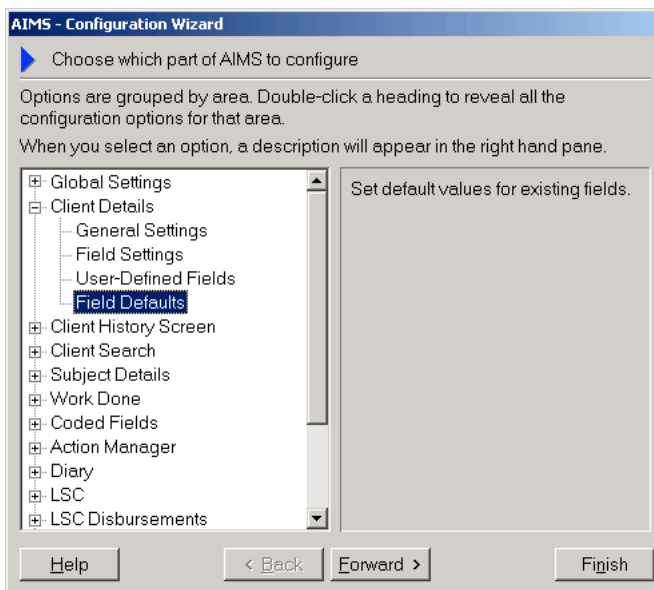
A screenshot of the "AIMS - User Defined Field Detail" dialog box. The title bar reads "AIMS - User Defined Field Detail". It has several input fields: "Field Name (must be unique)" with an empty text box; "Field Type" with a dropdown menu showing "Coded" selected; "Code List (if coded)" with a dropdown menu; and "Length (if text)" with a text box containing "0". At the bottom right are "OK" and "Cancel" buttons.

6. If you create a Coded user defined field before having created the correct Code List that corresponds to the new field you will have to select an existing Code List in order to be able to save and close this screen. You will be able to attach the correct Code List later but where possible it is better to create the new code list first.
7. Sometimes you may want to use a Code List that already exists in the database, e.g. re-using the referred in agency list for the referred to field choices. This same Code List will be available within different fields, but that does not mean the data captured by each field will be shared. When reporting each field will report only on the data it captured. However you should be careful not to change the coding choices without first considering the impact on any other field that shares the Code List.

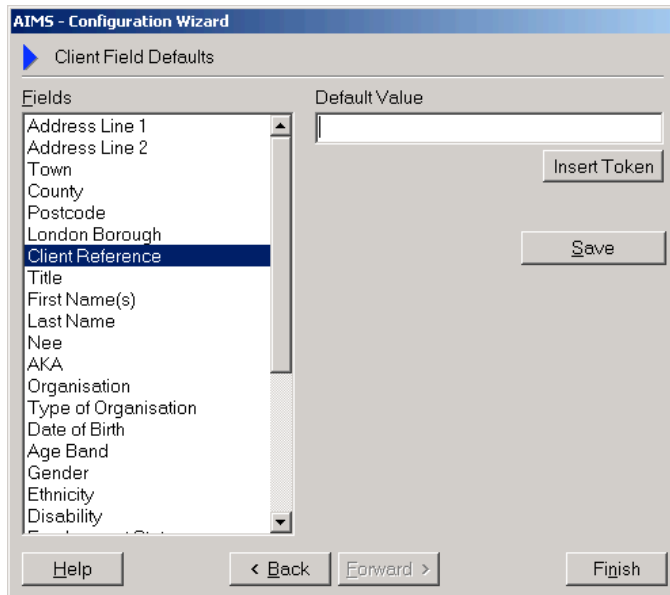
## Using Field Defaults

It is possible to create default entries for various fields within AIMS. This is done in the Field Defaults window of the section of the Configuration Wizard that relates to the screen where you want to create the default value.

In the example below the Client Details, Field Defaults option is selected.



Clicking the 'Forward' button will then open the Client Field Defaults window.



In this window you can see the fields which exist on the Client screen that can have default values applied. All of these fields are plain text fields; it is not possible to create default values for coded, numerical, financial or whole number fields.

## Default Values

There are two types of default values that can be created for a field.

Free text default values where the default value is a character, word or phrase entered by you which appears in a field when the form is opened and which can then be overwritten or edited.

Calculated default values where the default for a field is created by AIMS from information that is either already available to the system or that is entered at the time the screen is opened. This field can also be overwritten or edited.

Both types of values can be used to create a field default.

Each calculated default value is called a 'token'. The possible tokens are as follows:

<b>Token</b>	<b>Name</b>	<b>Description</b>
<b>&lt;UI&gt;</b>	User ID	Inserts the ID of the person logged on.
<b>&lt;CI&gt;</b>	Client Initials	Inserts the initials of the client i.e. if the client was 'John Smith' the initials 'JS' would be inserted.
<b>&lt;CW&gt;</b>	Caseworker ID	Inserts the ID of the Caseworker who is responsible for the subject. (This token will not work if selected for a default setting for a field in the Client form.)
<b>&lt;Cn&gt;</b>	First n letters from the client's name	Inserts the first n letters of the client's last name where 'n' can equal any whole number between 1 and 20. All the letters selected appear in upper case characters.
<b>&lt;D2&gt;</b>	Today's day	Inserts the day of the month as a two digit number i.e. if today's date were '1/8/03', the numbers '01' would be inserted.
<b>&lt;M2&gt;</b>	Today's month	Inserts the month of the year as a two digit number i.e. if today's date were '1/8/03', the numbers '08' would be inserted.
<b>&lt;Y2&gt;</b>	Today's year (2 digits)	Inserts the year as a two digit number i.e. if today's date were '1/8/03', the numbers '03' would be inserted.
<b>&lt;Y4&gt;</b>	Today's year (4 digits)	Inserts the year as a four digit number i.e. if today's date were '1/8/03', the numbers '2003' would be inserted.
<b>&lt;idC&gt;</b>	Client ID	Inserts the unique ID number that AIMS generates for each client entered into AIMS.
<b>&lt;idS&gt;</b>	Subject ID	Inserts the unique ID number that AIMS generates for each subject entered into AIMS.

#### .Creating a Default Value for a field

The procedure for creating a default value for a field is the same whichever screen it is created on and for whatever field.

The following description is for creating a default value that is a mix of free text characters and tokens. Remember when creating a default value, the maximum length that it can have

is defined by the maximum length that the field can contain. If the default value is longer, it will not be shown in the field and the excess data will be permanently lost. The Client, Subject and Subject reference fields are all 20 characters long.

1. Plan out on paper the field default that you want.

#### Examples

A possible Client Reference default value might be:


'Client's Initials', '/', 'Client ID', '/', 'Today's year (2 digits)'

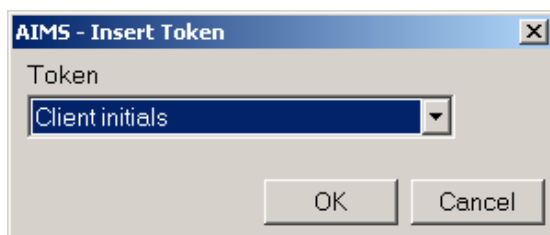
E.g. Client Ref: JS/112/03

A possible Subject Reference default value might be:

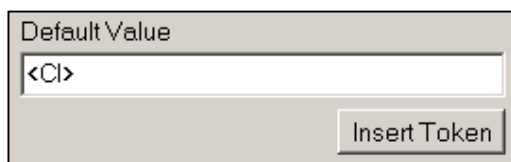
'Caseworker ID', '/', 'Client ID', ':', 'Subject ID', '/', Today's year (2 digits)'

E.g. Subject Ref: ADMIN/112/3071/03

2. Now open the Configuration Wizard and navigate to the screen where you want to create the default value.
3. Now select the Field Defaults form for that screen and click the 'Forward' button.
4. If you were creating the Client Reference field from the example above you would now be in the Client Field Defaults window.
5. Now select the field that you want to create the default for and click the button.  value



6. This will open the 'AIMS – Insert Token' window below.
7. Using the dropdown, select the first token that you want to insert and then click the 'OK' button. For the Client Reference default value you would have added the token '<CI>' and this would have been inserted into the Default Value field.



8. It is now possible to type in any free text character or symbols that you require after the token by positioning the cursor in the Default Value field and typing. For the

Client Reference default value example given above you would now type in a forward slash '/'.

9. To complete the required default value, continue to use the Insert Token button and type in free text characters and symbols as required.
10. When you have finished you must click the Save button before selecting another field or screen, or the new settings that you have entered will be lost.

## How to Create a Code List

**Code Lists** are where you can either edit existing field code choices, or create your own new ones. The screen below allows you to do both operations. Before starting on this operation you should already know what codes you wish to create and how you intend to report on them.

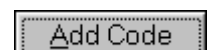
The screenshot shows the 'AIMS - Configuration Wizard' dialog box, specifically the 'Configure Code Lists' step. It features a 'Select a Code List' dropdown menu, 'New List' and 'Delete List' buttons, and a table with columns 'Code', 'Description', and 'Disabled'. At the bottom, there are buttons for 'Add Code', 'Edit Code', 'Delete Code', 'Enable/Disable', 'Help', '< Back', 'Forward >', and 'Finish'.

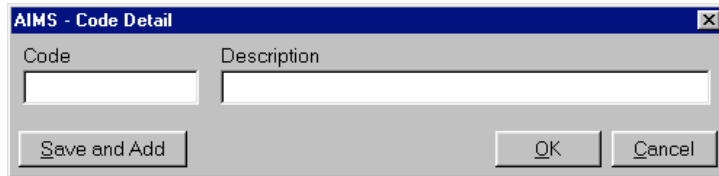
1. By clicking on the New List button you can create a new Code List. Once created this list will be available to be added to any new fields you have created in the system.

The screenshot shows the 'AIMS - Code List Detail' dialog box. It has a 'Code List Name' text field containing 'New List Just Created' and a 'Code List to copy' dropdown menu set to '< none >'. 'OK' and 'Cancel' buttons are at the bottom.

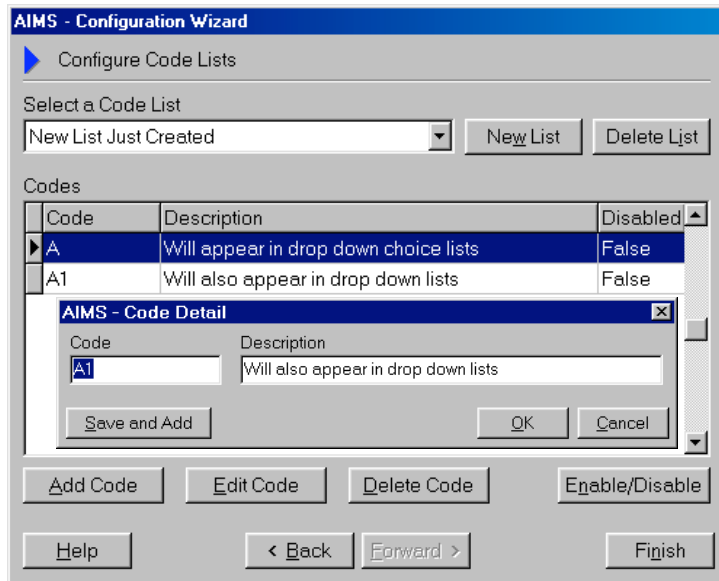
2. Make the Code List name meaningful so it can be easily identified later when you want to attach that list to the correct field. It is possible to use an existing list as a template to save you the time of entering details twice. By using the 'Code List to Copy' function you are able to copy exactly another classification list which you can then either edit or accept unchanged.

3. You can now add contents to the list by clicking on the 'Add Code' button at the bottom of the screen. A new pop up box will appear which will allow you to enter the code and then the description.

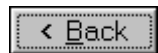




- As you complete the Code Detail the information is displayed in the main Code List window above it. Entries in this window can be edited or deleted once the Code Detail window is closed. To edit or delete an existing code see section below.

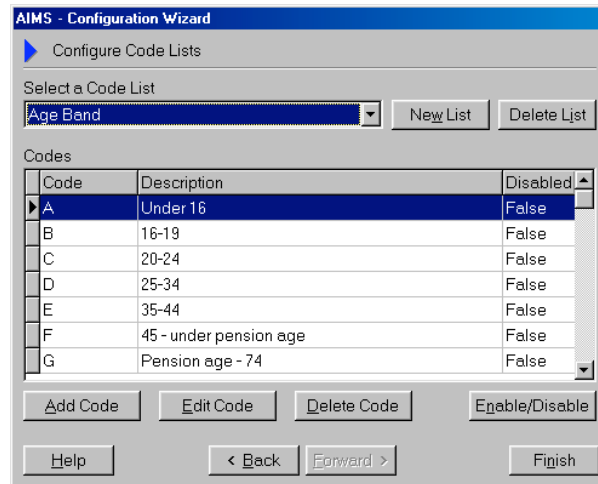


- When you add new codes to the system they are automatically “Enabled” i.e. switched on and available for selecting and reporting. In the screen below this is being described by the statement “Disabled” which equals “False”. If the statement were to read “Disabled” equals “True” then the code would be switched off within the database.
- When you have finished adding the code list use the ‘Back’ button to return to the main configuration screen. The new list you have written will now be visible in the main Code List and you can confirm this by opening the Code List screen and finding the appropriate entry.



## How to Edit an existing Code list

1. By using the drop down select a code list box you can select any coded field that you wish to edit.



2. All codes can be edited. Making an alteration to codes that already exist in the system will change that codes meaning throughout the database. You cannot delete a code that is in use in the system. You can however “switch” the code on or off for recording and reporting purposes which means it is no longer available to be selected. (See ‘How to Create a Code List – No. 5 for “Disabled equals False” discussion).
3. When you edit a code that is already in use in the system, all codes already present in the system will be updated to reflect the changes you make.

### Note

This will alter historic data and the affect of any changes should be considered carefully before progressing.

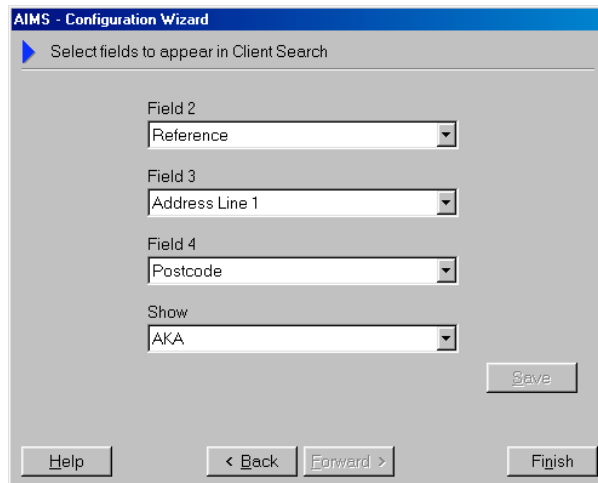
## Changing the Client Search field display

1. The Search screen offers three configurable search boxes and one configurable Show box. The first field in the search window is always Client/Org Name. You can select what the other fields are by using the drop down combo box shown against each field.

2. The Show field sets the default field name that will be displayed when the system is first used. This field can also be changed during the search process.

### Note

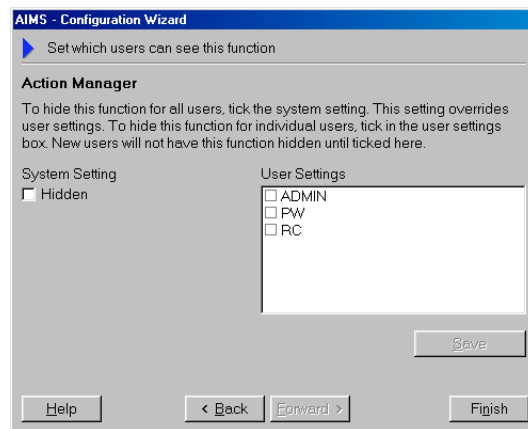
Only the Client Details fields will be available for selection in the drop down combo boxes. No information relating to subjects can be searched on through this function.



### How to hide / turn off certain functions

1. If you wish certain users not to see certain functions you can turn off or remove their access to those functions. Only AIMS Extra Users will see all of the functions listed below.
2. Various screens or functions can be switched off or hidden from view. These are Action Manager, Diary, Linked Clients button and 3<sup>rd</sup> Party button, Conflict of Interest, and Spell Checker. Before switching off or hiding the function you should consider carefully whether the system user might need to view the information even if they do not want to input data themselves, e.g. the Dairy.
3. By ticking the left hand System Setting Hidden check box the screen or feature is switched off throughout the whole database and is available to no-one. If at a later time you want to regain access to that feature or screen then simply reverse the action and it will be available.

- Individual users can have the screen or function hidden. By ticking one or more of the named users in the User Setting right hand pane they will have that function hidden from view. If at a later time you want them to regain access to that feature or screen then simply reverse the action and it will be available.

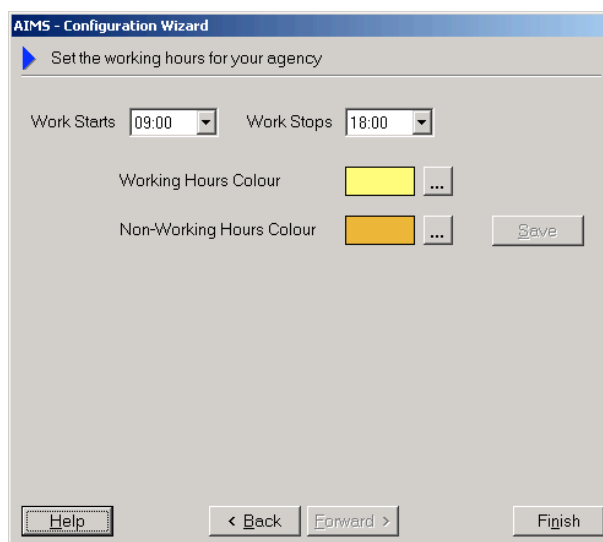


## Diary Configuration Options

As well as allowing you to hide the diary function from some or all users, Diary Configuration allows you to set two other options, Working Hours and User Groups.

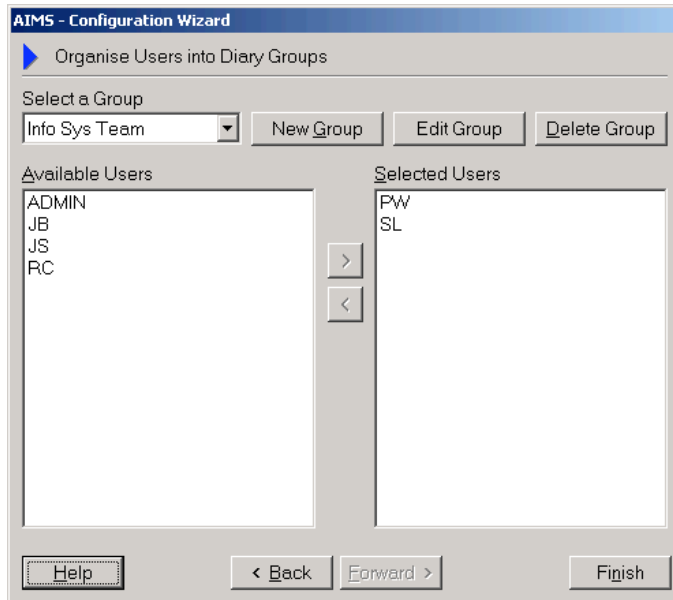


By configuring Working Hours, you can set your agencies working hours. You can also choose to display working hours and non working hours in different colours in the diary.

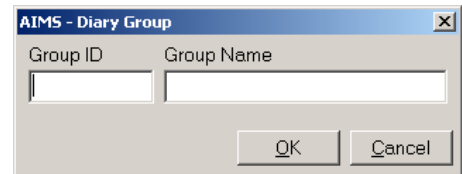


Configuring User Groups allows you to organise users into different diary groups. This enables you to select a group of users for a meeting or appointment without having to click on each user individually.

In the Configuration Wizard, select User Groups and click on the Forward Button. This will bring up the “Organise Users Into Diary Groups” Window:



To create a new group, click on the New Group button. This will bring up the Diary Group pop up window. In the Group ID box, enter a unique Group ID which can be up to five characters in length and then enter a description for the group in the Group Name box and click OK.

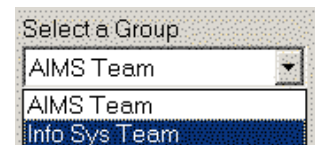


Once the group has been set up, you can begin adding relevant available users from the left hand pane of the “Organise Users Into Diary Groups” Window. Highlight the user(s) you want to add to the group and click on the right arrow button.



To remove a user from a group, highlight the user under “Selected Users” in the right hand pane and click on the left arrow button.

You can change the group description at any time by selecting the group from the Select A Group drop down box, highlighting the group you wish to edit and clicking on the Edit Group button.



Should you wish to delete a group, select and highlight the group and click on the delete group button.



**Note**

Deleting a group will not remove any existing appointments made for the group, however the group will not be available for selection for any diary appointments made after the group has been deleted.

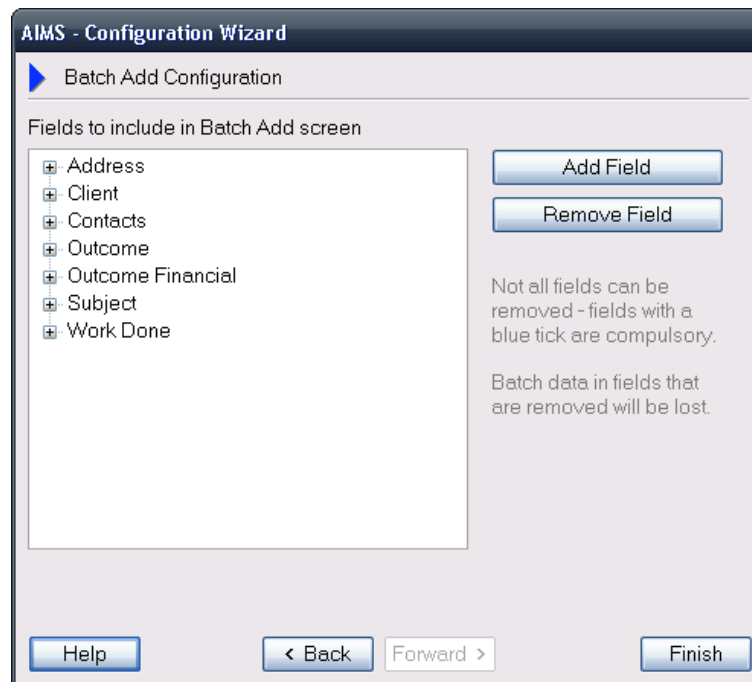
## Mail Merge

Mail merge configuration options are discussed in the section on [Setting up Mail Merges](#).

### Add Batch Configuration

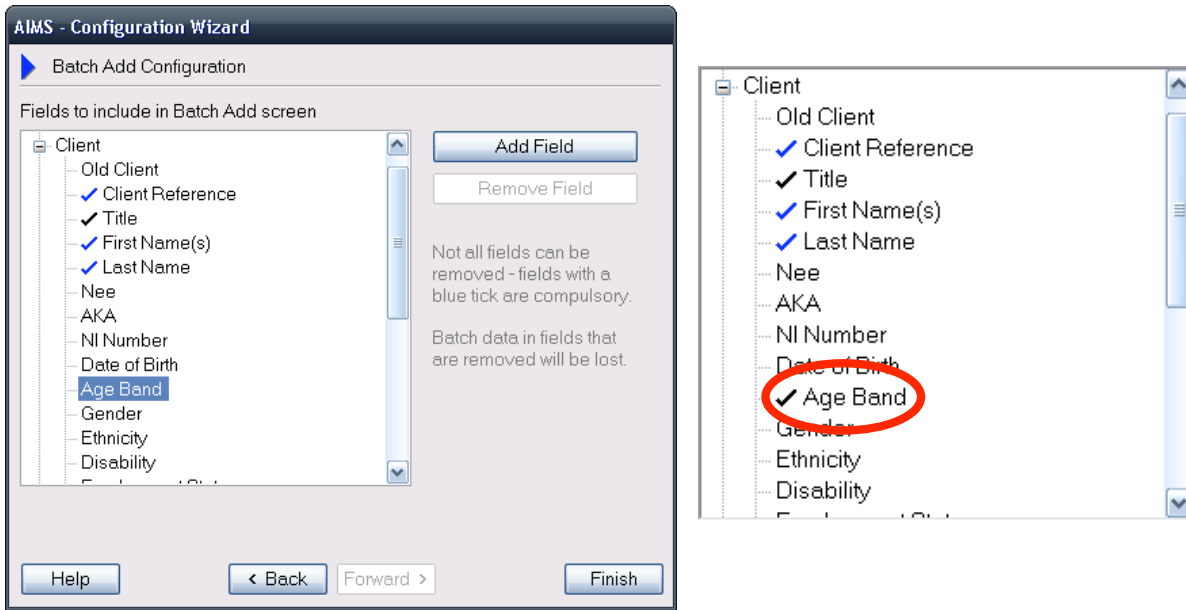
In order to make the most effective use of the Add Batch form you should use the configuration wizard to set up the form using the most appropriate fields for your working practices and use of AIMS. Think about what is actually required on the form and turn off any fields that may not be used.

To configure the Add Batch form, make sure you are logged in as an Administrator and that no one else is logged in, then click on the *ADMIN* menu and select *Configuration Wizard*. Scroll down to the bottom and double click on the *Add Batch* section to expand it and then click the *Forward* button. You will see a screen similar to the one below:

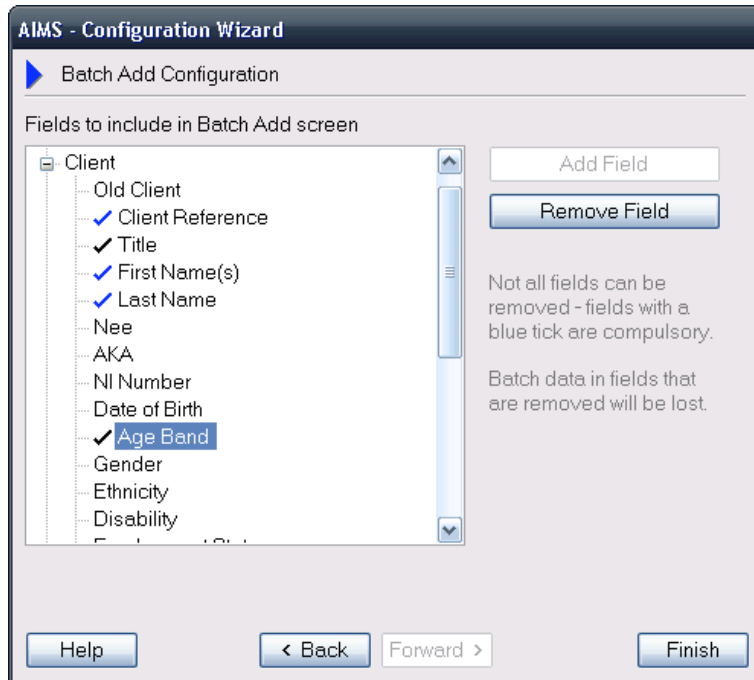


Each section of AIMS is represented by a folder name which can be expanded by either double clicking the name or clicking on the + sign next to each one. For instance, if you wanted to add the Age Band field to the Add Batch form, you would expand the *Client* section and then highlight the Age Band field. As you do this, the *Add Field* button becomes available (see image below). Simply click on this button and the field would be added to the form.

A black tick will be placed alongside the field in the list to indicate that this field is visible on the form (circled below). To add more fields you would continue to expand the sections required, highlight the field and click the *Add Field* button.



To remove fields, select a field from the list which has a black tick alongside it. The *Remove Field* button now becomes available. Clicking this button will remove the field from the Add Batch form. Note that there are certain fields that are required to maintain the integrity of the tables within the database and these cannot be removed. They are highlighted by a blue tick.



Any field defaults that are currently applied or set at a later date in configuration wizard will also apply to the fields selected to appear in Add Batch.

When you are happy with the field options selected, click the *Finish* button to exit the Configuration Wizard.

All of these functions can be found from the Housekeeping drop down list on the top menu bar (AIMS Access version only). There are two main ways in which the data in AIMS can be backed up or restored. The first is from within AIMS using the internal housekeeping functions. The second way is by using an external backup procedure such as a tape drive. This second way is more common on networked systems where there may already be a backup procedure in place.

### **Backing Up Data from within AIMS**

The Backup function in AIMS can only be applied when the machine from which you are running this function is the only one open on your network.

You can use Backup to save a copy of your client database either internally on your hard drive or on removable media such as zip, tape or floppy drives. Backups should be made on a regular basis, ideally daily. A new Backup should not overwrite the previous backup.

If you are working on a network please check whether your data is already being backed up. If you are unsure please check with your network administrator before attempting to backup your data.

### **Backup Procedure**

1. Select Housekeeping from the top menu bar then, from the drop down menu, click Backup.
2. A dialogue box 'Select Directory for Backup' will open asking you where you want to save a file named 'AIMS Backup.mdb' You can either accept the default name or enter a name of your choice. It is advisable to give each backup a unique name – you can do this by overtyping in the 'File name' field.
3. The dialogue box also asks you to enter a name for the directory/drive where you want to save AIMS. The default for this is the AIMS data directory.
4. It is advisable to save a copy of the backup onto removable media (zip drive, tape drive, floppy disk, etc) rather than onto your hard drive in order to protect against your computer being stolen.
5. Backing Up should be done on a regular basis. It is a good practice not to overwrite previous backups but to have several available, say 1 to 5 or Monday to Friday, in sequence. This means that if records are lost/damaged you will have a chance to look back over several backups to see when the damage occurred.

### **External Backing Up and Restoring**

Due to the variety of external backup procedures we are unable to give advice on how these might work. **However, creating external backup of the AIMS.mdb file (e.g. to Zip Disk, CD ROM, Tape etc.) is strongly recommended.**

## Backing Up

It is very important that any backup procedure is only run when all AIMS users have been logged out of the system. Failure to do so may result in damage to your client data. Should this happen, you can restore the AIMS.mdb from an earlier backup. The default location of the AIMS.mdb is in the directory '..\AIMS SA\data' or 'AIMS NS\data' depending upon your installation type.

## Restoring data

Once you have located the file that you wish to restore you will need to ensure it is called AIMS.mdb. If you are not displaying file extensions please ensure that the file is not renamed Aims.mdb.mdb. by accident. If you are unsure about the validity of the data being restored contact the AIMS team for further advice.

## Compacting

The Compaction function in AIMS can only be applied when the machine from which you are applying these functions is the only one open on your network.

The Compact function will improve the performance of the database and will happen automatically when the database opens for the first time.

Lasa may suggest you undertake a Compaction to help with database performance. To use the Compact function, select Housekeeping and then click Compact. A dialogue box will open explaining what is about to happen.

## Backing Up, Restoring Data – AIMS Firebird

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AIMS Firebird runs on version 1.5.1 of the open source Firebird client / server relational database management system.

For detailed information about backing up Firebird databases, please refer to the Firebird documentation at <http://firebird.sourceforge.net/>, including the Firebird 1.5 Quick Start Guide available at <http://firebird.sourceforge.net/pdfmanual/Firebird-1.5-QuickStart.pdf>.

It is strongly recommended that you read the "Backup" section of the Firebird Quick Start Guide as this contains important information.

As a minimum, AIMS Firebird users should ensure the AIMS.fdb file is backed up to an external medium using your normal external backup procedure. **Restoring the AIMS.fdb file should NOT be carried out while the database is running as this can cause corruption.**

Regular backups and ideally occasional restores using the Firebird command line back up utility gbak (see Firebird Documentation) should be scheduled as part of your database management activity. Alternatively you can use one of the more user friendly third party utilities available such as those described below. **However, external backup utilities or file copying tools should not be used on a running database as this can cause corruption.**

**Please note the AIMS Team is unable to support the Firebird Server software.**

## Firebird Server Backup Utilities

Examples include:

- FlameRobin available from [www.flamerobin.org/](http://www.flamerobin.org/) (Open Source Software) or
- FIBS - Firebird-Interbase Backup Scheduler (Free, see website for licensing information) available from [www.talatdogan.com/fibs.htm](http://www.talatdogan.com/fibs.htm)

Further examples are given at

[www.ibphoenix.com/main.nfs?a=ibphoenix&page=ibp\\_contrib\\_download](http://www.ibphoenix.com/main.nfs?a=ibphoenix&page=ibp_contrib_download)

**Please note the AIMS Team is unable to support any of this third party software so you will need to contact the suppliers directly.**

Backing Up, Restoring Data – AIMS MS SQL

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AIMS MS SQL runs on the Microsoft SQL Server client / server relational database management system. Please refer to your Microsoft SQL Server documentation for information on general server administration, backups and restoring data.

**Please note the AIMS Team is unable to support Microsoft SQL Server software.**