



## AIEx™ Online

### Participant Basic Instructions

Welcome to AIEx™ Online, the expectation alignment software by PDS Group LTD that helps you build productive relationships and get aligned on critical strategies, transitions and processes in your organization. As a registered participant in an AIEx™ project, you will be able to update and maintain personal job related information; add, update, and track your expectations of others and their expectations of you; and supplement your personal information with optional demographic information that can help our consultants research critical factors for successful change in organizations.

If you are a new participant in an AIEx™ Project, you already should have received training in AIEx™ concepts and data entry, and specific instruction on the key Components and other fields you will be using to manage your expectations. If you have not yet received instruction, much of the information you will be asked for by AIEx™ Online will be unfamiliar to you and it would be best to wait until after being trained before using AIEx™ Online.

If you need assistance with any AIEx™ Online functions, please contact the AIEx™ Help Desk at [alexhelp@pdsgrp.net](mailto:alexhelp@pdsgrp.net) and leave your phone number and email address where our technician can reach and assist you. AIEx™ Help Desk hours are 8:00 AM to 5:00 PM EST (GMT minus 5 hours) Monday through Friday. We are closed weekends and US holidays.

### Getting Started with AIEx™ Online

If you are a new registered participant, you will have received an email message from [alexadmin@pdsgrp.net](mailto:alexadmin@pdsgrp.net) at your current work address showing the login credentials (ID and password) you will use to access AIEx™ Online. To begin working with AIEx™ Online please open your Internet Browser, preferably Windows Internet Explorer 7, and navigate to <http://alex.pdsgrp.net> where you will see an AIEx™ login screen. Enter your ID and password, click the Login button and you will be taken to the AIEx™ Easy Entry page. If you don't recall receiving your login credentials or cannot locate the email message, go to the same login page, but click the Forgot Password button in the upper right corner of the screen. Enter your current work email address (where you received these instructions), and click Submit. In a few moments you will receive an email message with your password.

If this is your first time accessing AIEx™ Online, please click the My Account tab, select Update My Information, enter all information requested if applicable, and click Update. Note that if you change your email address that will become your new login ID. Then, if you choose to share optional demographic information with us, please select Complete Survey, enter any information you wish to share, and click Update. Any Survey information you choose to share will be used for research purposes only in the aggregate and only in a way that will not be traceable back to you. Finally, if you would like to select a different password, select Change Password, complete the necessary entries and click Submit. At this point you may be automatically logged out and asked to log back in.

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### Entering Expectations in AIEx™ Online

Now you're ready to begin using AIEx™ to get aligned with other participants and manage your expectations. If you're not already at the Expectations page, click the AIEx™ Easy Entry tab and you will be taken to the page where most of your expectation alignment work will be done. You should see your name in the Originator field. If you do not, please contact the AIEx™ Help Desk.

To enter a new expectation, complete the AIEx Project field by choosing from the drop down menu the AIEx™ Project you want to work with (some people are assigned to more than one project). Then continue by completing the Receiver, Type, Tension, Component, Expectation, and Coach Need fields. The Evidence field is completed after you and the Receiver agree on the text of the Expectation and Evidence. All other fields are optional but most should be used to more effectively manage your expectations. When you have completed data entry, click Save and your expectation will be saved to the database.

To create the same expectation of more than one Receiver, find the expectation you wish to copy in the List Window below the entry area, and click Edit. When the data appears in the entry area, click the Copy Current Expectation button. When the dialog box reports the copy has been successful, change the Receiver and other data as desired and click Update.

To edit existing expectations, you can scroll in the List Window to find them, or you can search for them by entering a value in one or more of the boxes in the entry area and clicking Search. Search results will appear in the List Window where you can select the desired expectation for editing. Make the desired changes and click Update.

Within a few days of your original entry of expectations you may notice comments have been added to your expectation text. That means our consultants have been auditing your expectations to assist you in creating clearly worded and S.M.A.R.T. expectations. Please use the suggestions and comments to improve the content of your expectations.

### Getting Reports on Your Expectations

When you are finished working with your expectations you can use the Reports tab to get lists of your expectations and build "Four Blockers" that tell you about your channels (relationships with others). Click on the Reports tab. You will have six reports from which to choose. Reports in the left column are specific to you. Reports in the right column contain information from the entire project in which you are participating. Any of the reports can be filtered to select certain groups of records, displayed on screen, printed, and downloaded in various forms (including Excel spreadsheets) to your own computer.

### Congratulations!

You now have all of the basic instructions needed to create, align and manage expectations; and you're on the way to building and strengthening productive relationships with all of the people participating in your AIEx™ project.

Wishing you much success,

***Your AIEx™ Consulting Partners***