

Quick Start Guide





Contents

| Navigating WS | 6 |
|--|----|
| Ribbon in WS | 6 |
| Home | 7 |
| View | 8 |
| Changing the Theme of the Software | 8 |
| Window List | 8 |
| Navigation Panel | 8 |
| Tools | 9 |
| Send and Show Log File | 9 |
| Save Customization Summary | |
| Perform Full Backup | |
| Import/Export Data | |
| Show Audit Trail | |
| Show Business Object Info | |
| Osnium Connect | |
| People | |
| List Views | |
| Creating New Clients, Children and Alleged Abusers | |
| Client/Adult Detail View | |
| Child Detail View | 23 |
| Alleged Abuser Detail View | 24 |
| Shelter/Stays | 26 |
| What is a Stay | 26 |
| Stays List View | 26 |
| Creating a New Stay Record | 26 |
| HUD Entries | 26 |
| Household Information/ Associated Stays | 27 |
| Services | |
| What is a Service | |
| List View of Services | |
| Creating a New Service | |
| Creating a Group Service | |
| | |





| Inputting Details for the Group Service | |
|--|----|
| Removing a Client from a Group Service | 32 |
| Splitting a Group Service | 33 |
| Victimizations | |
| What is a Victimization | |
| Victimization List View | 34 |
| Creating a New Victimization | 34 |
| Selecting a Main Victimization | 34 |
| Referrals | 35 |
| What is a Referral | 35 |
| Referrals List View | 35 |
| Creating a New Referral | 35 |
| Protection Orders | 36 |
| What is a Protection Order | 36 |
| Protection Order List View | 36 |
| Creating a New Protection Order | 36 |
| Outreach Event | 37 |
| What is an Outreach Event | 37 |
| Outreach/Education List View | |
| Creating a New Outreach Event | |
| Inputting Data for the Outreach | |
| Volunteer Time | |
| What is Volunteer Time | 59 |
| How to create a Volunteer Time | |
| Hotline Call | 40 |
| What is Hotline Call | 40 |
| How to Create a New Hotline Call | 40 |
| Converting Call to Client | 40 |
| About the Scheduler | 42 |
| What's in the Ribbon | 42 |
| Scheduler features | 42 |
| Copy and Pasting Events within the Scheduler | 43 |
| Editing Events from the Scheduler | 44 |





| Extending and Shortening an Event from the Scheduler | |
|--|----|
| Moving an Event in the Scheduler | |
| Shortcuts | 45 |
| Entering Data | 45 |
| More Info fields/items | 45 |
| Drop Downs | 45 |
| Setup Agency-Shelter information | 47 |
| Accessing Program Options | 47 |
| Setup Shelter Beds/Max Stays | 47 |
| Exceeded Stay Limit Message | 48 |
| Creating Staff/Users to login to WS | 48 |
| Navigating to Staff List View | 48 |
| Creating a New Staff Member | 48 |
| Creating a New Staff Role | 50 |
| Filtering in a List View | 50 |
| Full Text Search (Ribbon) | 51 |
| Filtering | 51 |
| Find Panel | 52 |
| Quick Auto Filtering | 53 |
| Initial Value on a Field | 55 |
| What is an Initial Value | 55 |
| Set Initial Value | 55 |
| Clear Initial Value | 55 |
| Required Fields | 56 |
| What is a Required Field | 56 |
| Make a Required Field | 56 |
| Clear Required Field | 56 |
| Modifying/Adding drop down options | 57 |
| Column Chooser | 58 |
| Adding Columns to a List View | |
| Hiding Columns from a List View | |
| Quick Tips when customizing | 60 |
| Sorting a List View by various fields | 61 |





| Sorting views | 61 |
|---|----|
| Clear All Existing Soring | 61 |
| Sort by one Field | 61 |
| Sort by one or More Fields | 61 |
| Group by Box | 63 |
| Ungroup specific field | 63 |
| Clear Grouping(s) | 63 |
| Backup a SQL Database to a file | 65 |
| Restoring a database file to SQL Server | 66 |
| Running Reports | 70 |
| Types of Reports | 70 |
| Display Reports | 70 |
| Generic Reports | 70 |
| Funder Reports | 70 |
| Importing a Report | 70 |
| Generating/Running a Report | 71 |
| Filtering Reports | 71 |
| Exporting Reports | 71 |
| Using the Email Report Function | 72 |
| Adding a Watermark | 72 |
| Thumbnails | 72 |
| Saving Reports | 72 |
| Printing Reports | 72 |
| Page Setup | 72 |
| | |



Navigating WS

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Navigating through WS can be done using the **Navigation Button** located in the top left corner of the main window. Clicking on this button will show a navigation menu with multiple Navigation Items.

- 1. Click the Navigation Button
- 2. Locate desired section and click

When clicking on a navigation item, the view for that item will normally appear as a tab. The tabs make it easy to navigate back and forth between modules. If a tab is already open, clicking on the respective item in the Navigation Menu will cause the existing tab to appear.



Ribbon in WS

The Ribbon is located at the top of the WS Software. The Ribbon contains the commands and tools that you need to work in WS.

| @ C 0 | () = | | | | | Person List - Womens Shelter | | |
|------------------------|---------------------|-----------------------------|-------|--------------------------------|--------------------|--------------------------------------|--|--|
| Home View Tools | | | | | | | | |
| New | Open Item | Shelter Refresh Show Report | Close | Previous Next Person Person | Filter All Items * | Filter by Text Text to search Search | | |
| Records Creation | Open Related Record | View | Close | Records Navigation | Filters | Full Text Search | | |
| Daviduard Reconstant × | | | | | | | | |
| | | | | | | | | |



Quick Start Guide

Home

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The Home Ribbon varies slightly depending on which tab you have open.

NEW: New is used to create new Clients, Hotline Calls, Incidents, etc. The drop down for New will change depending on what window you have open.

SAVE: Save has three options, **Save**, **Save and Close**, **and Save and New**. All options save your current work. **Save**, saves your work and keeps the current window open. **Save and close** will save your work and then close the current window. **Save and New** will save your current work, close the current record and then create a new record.

Edit: In the Edit section you will find three options, **Delete**, **Cancel**, and **Validate**. **Delete** will **erase** the record from the application. **Cancel** will **remove any changes** you made in the fields (cancel will not work when you delete records by mistake). **Validate** is used to ensure all information is entered, and no rules are broken before attempting to save your work.

Open Related Record: Open Item is used to open a drop down value. Once open, you can then edit the drop down.

View: View has three options, **Shelter Stats**, **Refresh**, **and Show Report**. **Shelter Stats** shows stats related to your shelter data, such as current stays. **Refresh** is used to refresh changes in an open tab when you make and save changes in another tab. (For Example you add an incident to a Client and Save the changes, if you have the Incident List open, you must click Refresh on the tab for the incident to show up in the list). **Show Report** allows you to quickly run a report related to the open or highlighted record.

Close. Close will close the current tab that is open, if information in unsaved, WS will ask the user if they would like to Save, in most cases Yes is desired.

Records Navigation. It is used to move up or down in the list of Objects. (For example a Client is open; clicking Next will show the Next Client in the List of Clients)

Filters and Full Text Search: These areas are discussed in greater details in the section Filtering in a List View







Validate

Edit

Cancel

Delete







View

The View tab is used to change the display of the software. Please see explanations below.

Changing the Theme of the Software

 Select a Theme from the various options listed under appearance



Window List

Window List is used to navigate through the software. A list of open windows can be seen at the bottom of the list. Select a window to navigate to it.

Window list allows you to create new vertical and horizontal tabs, as well as float current tabs.

Navigation Panel

Use Panels to set the Navigation panel as Visible, Hidden or Auto hide. If you make the Navigation Panel visible it will appear on the left side of your screen. It allows you to easily navigate through the database.









Tools

Send and Show Log File

Send Log File

Send log File is used to send your log file to Osnium's technical support team. If an error occurs, it is used to diagnose what occurred in the system before the error occurred.

- 1. Click Send Log File
- 2. Select Yes

| Send L | Log File |
|--------|---|
| 4 | Your trace log will be sent to Osnium over the internet. Do you want to continue? |
| | Yes No |

- 3. Include as much detail as possible regarding the steps leading up to the error.
- 4. Finally, use the dropdown to select the priority level of the issue. For example:
 - a. Low happened once, did not impact the functionality of WS
 - b. Medium occurs infrequently, and can continue to work around the error
 - c. High frequently occurs, causes loss of work or impairs ability of WS to function
 - d. Critical cannot continue to use WS

Show Log File

Show Log File load a window that shows you what has occurred in the system.

- 1. Click Show Log File
- 2. A new window will appear with the log file



| 🖳 Log File | | | • | 23 |
|--|--|---|-----|----|
| 29.02.16 11:17:57.389 29.02.16 11:17:57.407 | Window dosing: Call Window dosed: Call | | | |
| 29.02.16 11:20:46.084 | | | | |
| 29.02.16 11:20:48.084 | Type: DevExpress.ExpressApp.Actions.SingleChoice | Action | | |
| | ID: actionSh | owReport | | |
| | Category: \ | iew | | |
| | Controller.N | ame: | | |
| OmegaFramework.Module.W | /in.ViewControllers.ReportSpecific.ObjectReportsVC | | | |
| | Context.Na | ne: Worksheet | | |
| | Context.Isk | .oot: Irue | | |
| | Context.Se | screatObjects.Count: 1 rreatObjects.WS Module Models Clients CenericPerson Activity | , | |
| (17499ee3-6997-4ecc-b0e6- | -f31c6fbc2daf) | rencobject. Wolfiodale.hodels.clients.denenciferson_Acovity | | |
| 29.02.16 11:20:48.084 | SelectedItem: Service Display | | | |
| 29.02.16 11:20:54.997 | Action 'actionShowReport' done | | | |
| 29.02.16 11:21:43.266 | | | | |
| | Execute action | | | |
| 29.02.16 11:21:43.266 | Type: DevExpress.ExpressApp.Actions.SingleChoice | Action | | |
| | ID: actionSc | hedulerView | | |
| | Category: V | iew | | |
| | Controller.N | ame: WS.Module.viewControllers.SchedulerWorksheetSelection | IVC | |
| | Context.Na Context Inf | ne: worksneet | | |
| | Context Sel | ectedObjects Count: 1 | | |
| | Context.Se | rrentObject: WS Module Models Clients GenericPerson, Activity | , | |
| (17499ee3-6997-4ecc-b0e6- | -f31c6fbc2daf) | ·····,,,,,,,,,, | | |
| 29.02.16 11:21:43.266 | SelectedItem: Scheduler | | | |
| 29.02.16 11:21:43.868 | Window closing: Worksheet | | | |
| 29.02.16 11:21:43.874 | Window closed: Worksheet | | | |
| 29.02.16 11:21:43.892 | Action 'actionSchedulerView' done | | | |
| 29.02.16 11:30:48.743 | | | | |
| 20.02.16.11.20.40.742 | Execute action | A - H | | |
| 29.02.16 11:30:46.743 | Type: Devexpress.expressApp.Actions.SingleChoice | Action | | |
| | D: New Category: (| hierteCreation | | |
| | Controller N | ame. | | |
| DevExpress,ExpressApp,Wir | n.SystemModule.WinNewObjectViewController | | | |
| | Context.Na | me: Scheduler | | |
| | Context.IsF | .oot: True | | |
| | Context.Sel | ectedObjects.Count: 0 | | |
| | Context.Cu | rentObject: <not specified=""></not> | | |
| 29.02.16 11:30:48.744 | SelectedItem: Administrative Time | | | |
| 29.02.16 11:30:48.905 | Check App Name Compatibility | land an add data | | |
| 29.02.16 11:30:48.905 | Check stored module versions against the versions of the load medule "SystemMedule" (DevEverses Everses App v15-2) Loss | ed modules | | |
| 29.02.10 11:30:48.905 | module SystemMindowsFormsModule' (DevExpressApp.v15.2). Loca module 'SystemMindowsFormsModule' (DevExpress ExpressA | n Version: 15.2.5.0, version on DB: 15.2.5.0 on Win v 15.2) Local version: 15.2.5.0 Version on DB: 15.2.5. | 0 | |
| 29.02.16 11:30:48.905 | module 'OmenaAddressesModule' (OmenaAddresses). Local va | rsion: 1.0.5878.33381. Version on DB: 1.0.5878.33381 | × | - |
| 25102110 11:00. 10:000 | module omeganida esses i sadie (offieganda esses), estar vi | | | |
| | | | | |
| | | | | 9 |





Save Customization Summary

Save Customization Summary creates a document outlining all customizations for the database.

- 1. Click Save Customization Summary
- 2. Select a location to save the file, enter a File name and click Save

Note: It may take a few minutes for the file to save.

Perform Full Backup

The Perform Full Backup button is a quick way to backup your database.

Creating a New Backup

- 1. Click Perform Full Backup, select Local > New
- 2. Name the backup file (For Example: WS_Backup_Database)
- 3. Choose a location for the backup (For example: C:\Backups)

Performing the Backup

- 1. Click Perform Full Backup, select Local, and click the desired backup
- 2. Click OK
- 3. WS will notify you when the backup is complete. The backup file can now be found in the desired location.

Edit/Delete Backup Location

1. Click Perform Full Backup, select Edit







New





2. The window below will open

| @ C | • • | | Loca | I Only Backup Destinatio | n | | | - | | × |
|------------------|----------|--|-------|--------------------------|--------|-----------|------------------------|---------------|-----|---|
| | Home | Tools | | | | | | | | * |
| New | Refresh | Previous Local Next Local Only B Only B | Close | Filter All Items | * | Filter by | Text Text to se | arch Sear | ch | |
| Records Creation | View | Records Navigation | Close | Filters | | | Full Text S | Gearch | | |
| Name | | | | | Serve | r | Server | Backup Utilit | Max | |
| > WS_Backup_[| Database | | | | C:\Bac | :kups | | | | 0 |
| | | | | | | | | | | |
| User: OSNIUM\S | (STEM | | | | | | | | | |

3. Double Click on a Backup to edit the name or location of the backup

| ş) \ | NS_Backup_Database - | Local Only Backup Destination | | х |
|------|---|-------------------------------|-----|------|
| Lo | cal Backup Destination Enter the backup destin | nation details below | | |
| | ☆ Local Only Backup De: | stination | | |
| | Name: | WS_Backup_Database | | |
| | Server Backup Location: | C:\Backups | | |
| | Max Backup Count: | 0 | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | < Back Finish Can | cel |),;; |

4. The Delete and New button can be used to Delete Existing backups or Create New backups.

| |) C 🖸 | e 🕑 | | Local Only Backup Destination | | | | | | | × |
|---|-----------------|--------|--------------|-------------------------------|----------------------|-------|------------------|-----------------------|--|--|---|
| ١ | | ne Too | 9 | | | | | | | | ۵ |
| | New | Delete | C Refresh | Previous Local Only B | Next Local Only B | Close | Filter All Items | Full Text Search 👻 | | | |
| | Records Creatio | n Edit | View | Records Na | vigation | Close | Filters | | | | |





Import/Export Data

The Import/Export Data button is used by Osnium Staff to import data into your database. It is not generally used by Clients.

Show Audit Trail

Show Audit Trail is visible on detail views and shows changes made to the open record. It shows the User Name that made the change, the date, the operation type and a description of the change.

Show Business Object Info

This is used by Osnium Staff members to determine what fields were originally named. This is not generally used by Clients.

Osnium Connect

Osnium Connect will link you to the webpage connect.osnium.com. Osnium Connect is used to connect remotely with Osnium's staff when you require technical assistance.





Quick Start Guide

People

People/Clients include any Adult, Child or Alleged Abuser in the database.

List Views

People List View

People List view shows you a list of all Adults, Children/Dependents and Alleged Abusers

To open the person list view

- 1. Click the Navigation Button and click on People from the drop down. A list of all persons in the system will open.
- The person list view can be seen below. A full list of persons can be seen on the left side of the screen. The right side of the screen shows a preview of the selected participant.

| | Dashboard Overview of Clients and Program information |
|------------|--|
| | People A listing of all clients/children/alleged abusers |
| 2 | Hotline Call A listing of all calls that have been recieved at the shelter |
| Q | Scheduler A schedule view of all appointments by staff member |
| ;] | Surveys Create or View Anonymous Surveys |
| Ê | Reporting A repository of all the reports available in the system |
| | Lists |
| 2 | Other 🕨 |
| C | Exit |

| Dashboard | Rerson List | × | | | | | | | | |
|--------------------|-------------|---------|-----------|---|---------------|------------|---------------|-----------------|--------------|--|
| × Enter text to se | sarch | | | Find Clear | | | | | | 🧟 Doe, Mary |
| Person Type | Person ID | ID # | Last Name | First Name | Date Of Birth | Age Gender | Race | Hispanic/Latino | In Shelter 🔺 | |
| Client | 40 | Interna | Shelter | Adult | 10/8/1968 | 49 Female | Black or Afri | | | Details Contact Information |
| Alleged abuser | 22 | 3987 | Doedoe | Johnnie | 8/2/1964 | 53 Male | Don't Know | | | First Name: Mary Phone Numbers: ···· |
| Alleged abuser | 27 | | House | Abuser | 8/26/1968 | 49 Male | Don't Know | | | Last Name: Doe Address: ···· |
| Alleged abuser | 42 | | | | | 0 | | | | Date Of Rittly 5/15/1978 Final Address: |
| Client | 31 | | | | | 0 | | | | Annu 20 1 Drimmulaneuran Endish V - |
| Client | 21 | | Kit | Tren | 12/31/1947 | 70 Male | Black or Afri | | | Age: 39 v Primary canguage: English |
| Client | 36 | 000-00 | Stewart | Cindi | 9/6/1969 | 48 Female | White | | | |
| Child | 37 | | Stewart | Bobby | | 0 Female | White | | | Services Programs/Stays |
| Alleged abuser | 6 | | Guy | Bad | 6/2/1960 | 57 Male | White | | | 📲 💿 💿 Filter Al Items 👻 🕼 Export to 💌 🖉 Print Preview |
| Client | 4 | 0001 | Sara | Silly | 2/25/1979 | 38 Female | Black or Afri | | m | Start On V Start Time Duration Service Service Type Service Location |
| Child | 41 | | Shelter | Child | 8/8/2013 | 4 Female | Black or Afri | | | |
| Alleged abuser | 33 | IRK8823 | Jones | Kaleb | 8/30/1984 | 33 Male | Black or Afri | Non-Hispanic/ | | |
| Client | 43 | DH112 | | Derek | 4/16/1955 | 62 Female | White | Hispanic/Latino | | |
| Client | 34 | | | | | 0 | | | | |
| Client | 18 | | | | | 0 | | | | |
| Client | 12 | | | | | 0 | | | | |
| Child | 39 | IRONH | June | Sally | 9/8/2008 | 9 Male | White | Non-Hispanic/ | | |
| Client | 26 | | doe | jane | | 0 | | | | |
| Client | 19 | | TODD | TONY | 8/19/1980 | 37 Female | Asian | | | |
| Alleged abuser | 35 | | Son | Michael | 8/30/1960 | 57 Male | Native Hawa | | | |
| Client | 32 | | | | | 0 | | | | |
| Client | 13 | | | | | 0 | | | | |
| Alleged abuser | 30 | | | | | 0 | | | | |
| Client | 20 | | Boop | Betty | 8/26/1965 | 52 Female | Native Hawa | | m | |
| Alleged abuser | 15 | | Bob | Unde | 8/19/1986 | 31 Male | White | | | |
| Client | 5 | 0002 | Bell | Nelly | 2/13/1961 | 56 Female | White | | | |
| > Cient | 24 | | Doe | Mary | | 39 Female | White | Non+Ispanic/ | <u> </u> | |
| Client | 7 | | Star | Ruby | 10/11/1980 | 37 Female | Black or Afri | | | |
| Client | 38 | 000-00 | June | Jane | 9/8/1978 | 39 Female | White | Non-Hispanic/ | | |
| Alleged abuser | 3 | | Test | Abuser | | 0 | | | | |
| Alleged abuser | 9 | | Ho | Mean | 8/12/1980 | 37 Male | Asian | | | |
| Child | 46 | | Kyle | Sarah | 2/13/2009 | 8 Female | Asian | Non-Hispanic/ | V | |
| Client | 1 | | Test | Client | 4/16/1956 | 61 | White | Hispanic/Latino | V | |
| Client | 44 | | Done | Janet | 9/14/1991 | 26 Female | White | Non-Hispanic/ | V | v 0 |
| | | | | | | | | | 46 | 16 |

Creating New Clients, Children and Alleged Abusers

Creating a Client/Child/Abuser from a List View

There are two options for creating a new person from a list view

Option 1:

- 1. Click New from the Dashboard Ribbon
- 2. Select Client, Child or Alleged Abuser as desired.







Option 2:

- 1. Right click on the list on the left half of the screen
- Hover over New and select Client, Child or Alleged Abuser as desired

| 0 | Dashboard X | n/Active Clients | Active F | Programs/Stavs | vocate | 's Clie | nts 🖪 Renor | tina | | | | | |
|---|---------------------|------------------|-----------|------------------|------------|---------|--------------|------|------------------|----------|-----|-----------|----------|
| | New • | C Refresh | Show Repo | ort • 🗿 🥝 Filter | All Ite | ems | | - | 🔓 Export to 🔹 | | o P | age Setup | . ᢖ Prir |
| | × Enter text to sea | rch | | • | Find | 1 | Clear | | | | | | |
| | Person Type | Person ID | ID # | Last Name | - ^ | First | Name | - | Date Of Birth | Age | e | Gender | Race |
| | Alleged abuser | 42 | | | | _ | | | | | 0 | | |
| · | Client | 31 | | | | | New | | Ctrl+N | • | | Allogod | Abusor |
| | Child | 29 | | | | E | | _ | Chilly Chiffy, O | | 1 | Alleged | Abuser |
| | Client | 34 | | | | | Open item | | Ctrl+Shift+O | | 5 | Child | |
| | Client | 17 | | | | | Refresh | | F5 | | | Client | |
| | Client | 18 | | | | (| Show Report | rt | | • | 4 | | |
| | Client | 12 | | | | | Filter All I | ems | | + | 0 | | |
| | Client | 32 | | | | | | | | | 0 | | |
| | Client | 13 | | | | Q | Export to | | | <u>*</u> | 0 | | |
| | Alleged abuser | 30 | | | | d | 👌 Page Setup | | | | 0 | | |
| | Child | 25 | | | E | Bill | 3 Print | | Ctrl+P | | 4 | Male | White |
| | Client | 43 | DH112 | | (| Der | Print Previe | | | | 62 | Female | White |
| | Client | 5 | 0002 | Bell | 1 | Nel | | | | | 56 | Female | White |
| | Client | 14 | 301000 | Billy | l | Litt | Copy Cell V | alue | Ctrl+Shift+C | | 11 | Male | White |
| 1 | Alleged abuser | 15 | | Bob | | Un | Show Tool | bar | | | 31 | Male | White |

Creating a Client/Child/Abuser/Hotline Call from a person detail view

There are two options for creating a new person from a client/child/ abuser detail view.

Option 1:

- 1. From a client/child/abuser/hotline call detail view select Save and New from the Ribbon
- Home View Tools New Save Save and Save and New Close Delete Valid Records Creation Sav Client 2.5 0 🙎 Client Only List Smit 2 Alleged Abuser . Child Smith , Sally 9 Hotline Call ☆ Primary Information Home View Ξ New Save Save an Close Rec Alleged Abuser Child Client Hotline Call Person ID:

2. Select Client, Child or Alleged Abuser as desired

Option 2:

- 1. From a client/child/abuse/hotline call detail view select New from the Ribbon
- 2. Select Client, Child or Alleged Abuser as desired





Client/Adult Detail View

Double click on a Client from the list to see a detail view.

Opening a Client from the Client list will result in the details below:

The Client Detail View contains information regarding the client. Most fields are drop downs, or text boxes.

Please note instructions for the following fields:

- Estimated Age
 - If you enter the Client's estimated age, the date of birth estimated checkbox will be automatically selected.
- Phone Numbers
 - Select ... to open the phone number fields
 - o The selected Primary number will appear on the client profile
- Address
 - o Select ... to open the address fields
 - o Inputting the zip code will auto-populate the city, province and country

| | Saly - Clent X | | | | | | | |
|--|---|--|---|---------------------|-------------|-----------------------------------|---|-----|
| 🧟 Smith , Sally | | | | | | | | |
| Primary Information | | | Demographics | | | ☆ Client Contact Information | | |
| Intake Date: 2/1/2017 | | - | Gender: | Female | х • | Phone Numbers: 123-456-7897 | | |
| Person ID: 49 | | х • | Primary Race: | Other Multi-Racial | х . | Address: Yukon, PA, United Sta | ates, 15698 | |
| ID #: | | | Hispanic/Latin@: | Hispanic/Latino | х . | County: Bullock | | х • |
| | | | Sexual Orientation: | Heterosexual | х - | If Other: | | |
| First Name: Sally | | | Marital Status: | Divorced | Х т | Rural Status: Suburban | | х - |
| Last Name: Smith | | | Primary Language: | English | X + | Email Address: sally@smith.com | | |
| Middle Name: | | | Limited English Proficiency: | No | * | Emergency Contact Information | | |
| Date Of Birth: 2/13/1967 | Date Of Birth Estimated | | | | | | | |
| Age: | 50 \$ | | | | | Emergency Contact Name: 5 | aran Smith | |
| | | | | | | Emergency Contact Address: B | Rillon, PA, United States, 15678 | |
| | | | | | | End gency contact roatcost | | |
| 🚴 (2) Referrals | (2) Financial Assistance Provided | (1) Destantion | - Orden | (1) Chained Markers | 9 (2) Dalah | | after and a second | |
| | | (1) Protection | li Order | (1) Clinical Notes | (5) Kelau | ed Calls 🔰 (1) SURV | /eys Tile Attachments | |
| E General Information | (1) Children/Dependants | (1) Protection | lleged Abusers | (1) Cirrical Notes | a (5) KBab | (1) Survices | Pie Attachments | |
| E General Information | (1) Children/Dependants | (1) Protection | lleged Abusers | (1) Clinical Votes | (5) Kelab | (1) Survices | reys Pie Attachments | |
| General Information Other Information | (1) Children/Dependants | (1) Protection | Ileged Abusers ssifications | (1) Cirical Hotes | J (3) Keau | (i) Survices | reys Fie Attachments | |
| General Information Other Information Primary Advocate: | Administrator x + | (1) Protection (1) All Special Class G Add | Ileged Abusers ssifications | (1) United Holes | J (3) Kelau | eo cais | Pie Attachments | |
| General Information Other Information Primary Advocate: Primary Referral Source: | Administrator X + Sexual Assoult Agency/Advocate X + | (1) Protection ① ① (1) All > Special Class : : : : : : : : : : : : : : : : : : : : : | Ileged Abusers ssifications | (2) Victimizations | J (3) Keau | eo cais 🛐 (1) suin | Pie Attachments | |
| Conternation Conternation Other Information Primary Advocate: Primary Referral Source: SSN: | Administrator × - Sexual Assault Agency/Advocate × - Sa7459962 | (1) Protection (1) All Special Class (a) Add Name Homeless | Ileged Abusers ssifications | (1) Cerica roles | (3) Kelau | eo cars 👘 (1) sun (2) Services | Pie Attachments | • |
| General Information Other Information Primary Advocate: Primary Referral Source: SSR: Veteran: Terrinary Referral Source: | Administrator X - Sexual Assault Agency/Advocate X - 587458962 | (1) Protection (1) All ≈ Special Class i | Ileged Abusers ssificatons | (1) Celica noises | (() Keat | es cars 🥂 (i) survices | Pie Attachments | • |
| General Information Other Information Primary Reformation Primary Referral Source: Stilt Veteran: Immigrant: | Administrator X - Sexual Assoult Agency/Advocate X - Ssx458962 No - No X - | (1) Protection (1) Al Special Class (6) Add Name Homeless | Illeged Abusers ssfications | (1) Celica noises | () (S) Kedu | eo cara | Pie Attachments | • |
| General Information Other Information Primary Advocate: Primary Referral Source Ssite Veteran: Immigrant: Highest Education Completed: | Administrator × - Sexual Assoult Agency/Advocate × - Sexual Assoult Agency/Advocate × - 12th grade, No dploma × - 12th grade, No dploma × - | (1) Protection (1) Al Special Class (6) Add Name Homeless | lleged Abusers ssfications | (1) Cerica noises | (3) Kedu | eo cara (2) Services | Pie Attachments | |
| Gildeneral Information Collect Information Primary Advocate: Primary Referral Source: SSI: Veteran: Immigrant: Highest Education Completed: Employment Status: | Administrator X Sexual Assault Agency/Advocate X SarJassault Agency/Advocate X No X 12th grade, No dploma X Part the looking for full time X | (1) Protection (1) AI Special Class (6) Add Name Homeless | lleged Abusers ssfications (g Remove) @ @ | (1) Cerica noises | | e cais 🥂 (i) Survices | Pie Attachments | • |
| General Information Collect Information Primary Advocate: Primary Referral Source: Solic Veteran: Imingrant: Highest Education Completed: Employment Status: Employment Factor Income | Administrator × - Sexual Assault Agency/Advocate × - Sa7459962 No × - Izib grade, No diploma × - Part time looking for full time × - Walnart | (1) Protection (1) Al | Ileged Abusers ssfications | (1) Cerica noises | | e cais 🥂 (i) survices | Pie Attachments (1) Programs/Stays | • |
| General Information Other Information Primary Advocate: Primary Referal Source: Stil: Veteran: Immigrant: Highest Education Completed: Employment Status: Employer: Family Income: Individual Income: Individual Income: Individual Income: Income: Indindividual Income: | Administrator × - Sexual Assault Agency/Advocate × - Sexual Assault Agency/Advocate × - Sa7458962 No • - No × - 12th grade, No dploma × - Part time looking for full time × - Walmart S8,000.00 ↓ S8,000.00 ↓ | (1) Protection (1) Ald Special Class (1) Ald Mame Homeless | Illeged Abusers sofications | (1) Celica noises | | es cara | Fie Attachments Image: Programs/Stays | • |
| General Information Other Information Other Information Primary Advocate: Primary Referral Source: Site Veteran: Information Employment Status: Employment Status: | Administrator × - Sexual Assault Agency/Advocate × - Sexual Assault Agency/Advocate × - Sa7458962 No · · No × - 12th grade, No diploma × - Part time looking for full time × - Walmart \$8,000.00 € | (1) Protection (1) (1) All All Special Class (1) Ald Name > Homeless | Illeged Abusers ssfications (2) Remove 2) 2) 2) | (1) Celica noise | | eo cara | Pie Attachments | • |
| General Information Other Information Primary Advocate: Primary Referral Source Stile Veteran: Immigrant: Highest Education Completed: Employment Status: Employment | Administrator × - Sexual Assault Agency/Advocate × - Sexual Assault Agency/Advocate × - Safetse × - 12th grade, No dploma × - Part time looking for full time × - Wahart \$8,000.00 ; \$8,000.00 ; \$8,000.00 ; | (1) Protection (2) Protection Special Class (2) Add Name > Homeless | Illeged Abusers ssfications | (1) Celica noises | (3) Acat | i (2) Services | Pie Attachments (1) Programs/Stays | 4 |





Tabs within a Client Detail View

Clients have a variety of historical information and associated records included in tabs at the bottom of their Client record. These tabs include:

| (2) Referrals (2) Financial Assistance Provided | | 🚡 (1) Protection Order | (1) Clinical | al Notes 🧳 (3) Related Call | | ills 🚺 (1) Surveys | | | File Attachments | |
|---|--|---------------------------|---------------------|-----------------------------|--------------------|--------------------|--------------|--|------------------|-------------|
| E General Information | | 👮 (1) Children/Dependants | (1) Alleged Abusers | | (1) Victimizations | | (1) Services | | 🔊 (1) Prop | grams/Stays |

- General/Employment/Income Information
- Children/Dependents
- Alleged Abuser
- Victimizations
- Services
- Programs/Stays
- Referrals
- Financial Assistant Provided
- Protection Order
- Clinical Notes
- Related Calls
- Surveys
- File Attachments

General/Employment/Income Information Tab

General/Employment/Income Information contains additional relevant information for the Client.

- Employment/Income
- Special Classifications
 - Click Add to select a classification
 - Select all that apply (hold Ctrl to select multiple options)

| E General Information | hildren/Dependants 🖉 Alleged Abusers | ≙ | victimizations | Services | Programs/Stays | 🗞 Referrals | S Financial Assistance Provided | Protection Order | Clinical Notes | 2 Related Calls | Surveys | File Attachments |
|-----------------------------|--------------------------------------|---|--------------------|----------|----------------|-------------|---------------------------------|------------------|----------------|-----------------|---------|------------------|
| ☆ Other Information | | | ☆ Special Classifi | ications | | Notes | | | | | | |
| Primary Advocate | × | | 🕴 🐻 Add 🐻 | Remove 6 | | 1 | | | | | | - |
| Primary Referral Source | X • | | Name | | ~ | | | | | | | |
| SSN | | | | | | | | | | | | |
| Veteran | N/A - | | | | | | | | | | | |
| Immigrant | × - | | | | | | | | | | | |
| Highest Education Completed | × • | | | | | | | | | | | |
| Employment Status | × • | | | | | | | | | | | |
| Employer | | | | | | | | | | | | |
| Family Income | \$0.00 \$ | | | | | | | | | | | |
| Individual Income | \$0.00 0 | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | 0 | | | | | | | - |





Children/Dependents

The Children/Dependents tab contains a list of all children/dependents associated with the client.

Linking the Children/Dependents

- There are two options to link Children to a Client
 - \circ $\,$ 1. Click Add and select one or multiple preexisting Children from the list
 - o 2. Create a New Child, add the child details to the profile, then Save and Close
- To remove a Child/Dependent from the list
 - o Select the Child from the list and click Remove

Viewing the Children/Dependents

- Double click on the Child to open a detail view.
- The parent will be automatically populated into the Child's profile



Note: This linkage works both ways. You can add a Parent to the Child's profile by selecting a client from the drop down list and the Child will populate onto the Parent's profile.





Alleged Abuser Link

Creating a New Alleged Abuser

- 1. Select New in the Alleged Abuser Link tab
- 2. Fill in the details related to the abuser

| | 🗞 (2) Referrals | S (2) | Financial Assistance | Provided | 🔒 (1 |) Protection Order | (1) Clinica |
|---|---------------------|----------------|----------------------|--------------------------|------|-----------------------------------|------------------|
| 1 | 📰 General Informati | on | 👲 (1) Children/De | ependants | | (1) Alleged Abusers | |
| ÷ | 🗌 New 🔻 🕻 | Add 👩 Remove 🗙 | 📑 📔 Show Repo | rt 🕶 💿 💿 Filter All Iter | ms | - Export to - | 🖉 Print Preview. |
| Ī | Person ID | Last Name | ▲ | First Name | | Date Of Birth | |
| | 51 | Smith | | John | | 2/13/1962 | |

| Primary Information | | Demographics | | | A Physical D | escription | 1 | |
|-----------------------|--|------------------------------|-----------------------------------|---------------|--------------|------------|-----------------------|---------------|
| Intake Date: | • | Gender: | Male | х • | Height: | 6 ft 2in | | |
| Person ID: | 51 × - | Primary Race: | White | × * | Weight: | 300lb | | |
| ID #: | | Hispanic/Latin@: | Non-Hispanic/Non-Latino | × • | Hair Color: | Gray | × - | |
| E-18 | 1.4- | Sexual Orientation: | Heterosexual | X * | Hair Length: | Medium | × • | |
| First Name: | John | Marital Status: | Divorced | × * | Facial Hair: | Moustad | he X - | |
| Last Name: | Smith | Primary Language: | English | × • | Euro Colori | DL.e | × | No image data |
| Pilodie Name: | | Limited English Proficiency: | No | - | Eye Color: | Diue | ~ * * | No mage data |
| Alternate Names: | | | | | Glasses | | Distinguishing Marks: | |
| Date Of Birth: | 2/13/1962 V Date Of Birth Estimated | Alleged Abuser Contact | Information | | Contact Le | enses | A | |
| Age: | 55 \$ | Address: | | | | | | |
| | | County: | | × • | | | | |
| | | Phone Numbers: | | | | | T | |
| | | | | | | | | |
| 2 (1) Related Clients | C Services | | File Attachments | | | Dinical No | ites | Surveys |
| 🕴 🝙 Add 🛛 🍙 Remove | 👼 📔 Show Report 🗝 💿 💿 Filter 🛛 All Items | 👻 🛛 🔚 Export to | Print Preview | | | | | |
| Last Name | First Nac | ie | | Date Of Birth | | | Gender | |
| > Smith | Saly | | | | | | | |

Victimizations Link

Creating a New Victimization for more detailed information see Victimizations - Create a New Victimization

- 3. Select New in the Victimizations Link tab
- 4. Fill in the details related to the victimization

| 🔏 (2) Referrals | <mark>\$</mark> (2) I | inancial Assistance P | rovided | 🗟 (1) Protection Order | 🦓 (1) Ci | nical Notes |) (3) Related Calls |
|-----------------------------------|-----------------------|-----------------------|---------------|------------------------|------------------|----------------------|---------------------|
| 27 General Information | | 👲 (1) Children/De | pendants | 🚊 (1) Alleged Abu | sers | (2) Victimizations | |
| Adult Sexual Assault - Smith , Se | ally - 6/6/2016 | × • | 🗌 New 🔹 🗙 | 📑 📋 Show Report 🔹 💿 | Filter All Items | - 👔 Export to | 🔹 🕼 Print Preview. |
| A Main Victimization | | | Date Reported | Date Of Victimization | Victim Type | Victimization Type | Primary Ab |
| Data Departude | 2/7/2017 | | > 2/9/2017 | 6/21/2016 | | | |
| Date Reported. | 2///2017 | | 2/7/2017 | 6/6/2016 | Primary | Adult Sexual Assault | |
| Date Of Victimization: | 6/6/2016 | * | | | | | |
| Victim Type: | Primary | х - | | | | | |
| Victimization Type: | Adult Sexual Assaul | t × - | | | | | |
| Primary Abuser: | | х - | | | | | |
| Primary Abusers Relationship: | | X • | | | | | |
| | | | | | | | |

- 5. Select the Victim Type and Victimization Type. If known, the Primary Abuser from a list of Abusers in the database, OR create a New Abuser
- 6. Save and Close

Other Victimization Types

1. Choose another Victimization from the list by clicking the Add button

Note: hold CTRL down to add more than one







Services

The **Services** section contains a list of services related to the Client. Double click on a service to view a detailed view of the record. For more detailed information please see Service - Creating a New Service Record

To create New Service

 Click the New button in the upper left hand corner of the Services Tab

| (2) Referrals (2) Financial Assistance Provid | ded 🔁 (1) Protection Order | (1) Clinical Not | tes 🤰 | (3) Related Calls | (1) Surveys |
|---|------------------------------------|------------------------|--------------------|-------------------|--------------------|
| E: General Information | ants 🚊 (1) Alleged Abusers | | (2) Victimizations | | (2) Services |
| 📋 New 🔹 🗙 📑 📋 Show Report 🔹 💿 🕝 Filter All Items | s 🔹 🚽 🔚 Export to 👻 💋 Print Previe | N | | | |
| Start On V Start Time Duration Service Staff | f Member Method Of Contact | Service Type | Service Location | County | Session Topic List |
| > 2/6/2017 10:30:00 AM 1.00 Group Activities Admi | | | | | |
| | | and the set of the set | | | - 1 - 1 |

 Fill in details add Topics by clicking Add under the Topics tab hold CTRL to add more than one



Program/Stays

The **Programs/Stays** section contains a list of stays related to the Client. Double click on a stay to view a detailed view of the record. For more detailed information as well as information relating to HUD please see Shelter Stays - Creating a New Stay Record

To create New Stay

2.

1. Click the New button in the upper left hand corner of the Shelter section in the Program/Stays Tab

| | (2) Referrals | 8 (2) Financial Assistance Press | ovided | (1) Protection Order | (1) Cir | ical Notes | (3) Related Ca | ls 🗄 | (1) Surveys | File Attachments | |
|------------|------------------------|------------------------------------|--|---------------------------------------|------------------|--|-------------------------|----------------------|-----------------------|------------------------|-----------------|
| | EF General Information | 👥 (1) Children/Dep | endants | (1) Alleged Abusers | | (2) Victimizations | | (2) Services | | (1) Programs/Stays | |
| | 📋 New 🔹 🗙 📑 Ӗ | Show Report 👻 📄 Copy Stay To Child | l(ren) 💿 💿 Filter HMIS/H | UD Entries 🔹 👻 🙀 Export to | 🔹 💋 Print P | review | | | | | |
| | Admission Date | Discharge Date | Туре | | | Sen | vice Location | | | | l. |
| | > 2/8/2017 | 3/17/2017 | Emergency Shelte | f | | | | | | | |
| | | | | | | | | | | | |
| | | | Home Tools | | | | | | | | * |
| | hatuna af | tou from | | Y 🗙 🗸 🤊 📑 | C 🗎 | | O X | | | | |
| Select t | ne type of s | stay, mom | New Save Save and Save and Close | d New Delete Valdate Cancel Open Item | Refresh Show Re | port Copy Stay To Previous Ne Child(ren) Program/Stay | ext Program/Stary Close | | | | |
| | | | Records Creation Save | Edit Open Related R | ecord Vi | ew Records N | lavigation Close | | | | |
| here vo | u can also a | add children | Stay | | | | | | | | |
| / - | | | * Admission Information | | | Coscharge Information | | | * Admission Notes | | |
| if they a | tay with th | e narent | Clent: Clent: | , Sely | | Discharge Date: | | | | | * |
| ii tiicy s | stay with th | c parent | Admission Date: 2/13 | 2017 | | Reason For Termination: | | × | | | |
| | | | Type: | | × • | Destination (at Exit): | | × | | | |
| | | | Referral Source: | | × • | | | | | | |
| | | | Prior Living Situation: | | × - | | | | | | |
| | | | Housing Status At Admission: | | × × | | | | | | ¥ |
| | | | | | | | | | | | |
| | | | A Household Information | | | | | HMIS/MUD Entries | | | |
| | | | Head of Household: | | | | × - | ○ New • × ■ 0 |) (i) Filter Al Items | - 🕼 Export to 🔹 🕼 Prin | nt Preview |
| | | | × Associated stays / Parily Hember sta | | 11.0.4 | 1.7.1.1.1 | | Collection Type Ette | ctive Date Creat | ted By Date Updated I | Last Updated By |
| | | | ; C New * Ca Add Co Remo | Advantation Date | - Discharge Date | xo • 1/2 Print Preview | | | | | |
| | | | dinin. Pirmi | | Circuitge Date | 1994 | | | | | |
| | | | | | | | | | | | |
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Quick Start Guide

Program/Location contains a list of program enrollments for the Client.

- 1. In the Type drop down select Outreach / Non-Residential
- 2. In the **Program / Location** dropdown select the program

Referrals

Referrals contains a list of services you have referred the client to. Double click a referral to see a detailed view of the record.

To create a new Referral

- Click New in the upper left hand corner of the Referrals tab
- 2. In the pop up select the Destination of the referral
- 3. Any notes associated with the referral
- 4. Save and Close

| | | (1) Children/Dependant | s | 1) Alleg | ed Abusers | (2) Victin | nizations |
|-----|---|---|----------|---------------------------------------|---------------|--------------------|------------|
| | 🔅 (2) Finar | ncial Assistance Provided | | (1) Protection O | rder | (1) Clinical Notes | |
| 📋 s | how Report - | Filter Al Items | v | 🕞 Export to 🔹 😡 | Print Preview | | |
| De | stination | | | · · · · · · · · · · · · · · · · · · · | | | |
| Foo | od Stamps | | | | | | |
| Leg | al | | | | | | |
| | | | | | | | |
| 2 | | 健 ⊚ ⊘ ∓ | | Referral | | | × |
| | | ome Tools | | | | | \$ |
| Ċ | - | Save | X Delete | _ | and | | |
| | | Save and Close | Validate | L= | C Refresh | Previous Referral | |
| | New | Save and New - | Cancel | Open Item | Show Report + | O Next Referral | Close |
| Re | cords Creation | Save | Edit | Open Related Record | View | Records Navigation | Close |
| | | | | | | | |
| | ☆ Referral | | | | | | |
| | Client: | Smith , Sally | | | | | |
| | 0.6.10.1 | | | | | | |
| | | | | | | | |
| | Referral Date: | 2/13/2017 | | | | | × - |
| | Destination: | 2/13/2017 | | | | | x • |
| | Destination: Created By: | 2/13/2017 Administrator | | | | | x • x • |
| | Created By: | 2/13/2017 Administrator | | | | | x • x • |
| | Created By: | 2/13/2017 Administrator | | | |] | × • × • |
| | Created By: | 2/13/2017 Administrator | | | |] | x • x • |
| | Created By: | Administrator | | | |] | X • X • |
| | Created By: | 2/13/2017 Administrator | | | | | x • x • |
| | Created By: | 2/13/2017 Administrator | | | |] | × • |
| | Created By: | 2/13/2017 Administrator | | | | | X • X • |
| | Destination: Created By: | [Administrator | | | | | X • X • |
| | Created By: Notes | 2/13/2017 Administrator | | | | | X • X • |
| | Referal Date: Destination: Created By: Notes | 2/13/2017 Administrator | | | |) | X • X • |
| | Referral Date: Destination: Created By: Notes | [2] (2] (2] (2] (2] (2] (2] (2] (2) (2) (2) (2) (2) (2) (2) (2) (2) (2) | | | | | X • X • |

☆ Stay

Admission Information

Client: Smith , Sally

Name Emergency Shelte

Lodging & Homelessness Pre

Outreach / Non-Re

Permanent Housing Rapid Rehousing Transitional Housing

Admission Date: 2/13/2017 Type: Program / Location: Name

Referral Source:

r Living Situation:

g Status At Admis

🚺 New 🔹 🚺 Add 🐻

hold Information Head of Household: ociated Stays / Family Me

Financial Assistance Provided Tab

Contains a list of all **Financial Assistance** that has been provided to this client. Double click the an assistance note to see a detailed view of the record.

General Inform
 General Inform
 (2) Referra
 New

Creating a new Financial Assistance

- Click the New button in the top left hand corner of the Financial Assistant Provided tab.
- 2. Complete the pop up select a Financial Assistance Type from the dropdown list
- 3. Save and Close







Protection Order

The Protection Order tab contains a list of protection orders associated with the client. Double click an order to see a detailed view of the record.

Creating a New Protection Order

- 1. Click New in the upper left hand corner of the Protection Order tab
- 2. Fill in the details for the protection order
- 3. Save and Close

Clinical Notes

The Clinical Notes tab contains a list of notes associated with a client. Double click on a note to see a detailed view of the record.

To create a new Clinical Note

- 1. Click New in the upper left hand corner of the Clinical Note Tab
- 2. Enter the Date, Subject and Notes associated
- 3. Save and Close

Related Calls Tab

Contains a list of all Calls associated with the Client including hotline calls. Double click on a call to see the detailed view.

🔏 (2) Ref

Date Cres

| 🔬 (2) Referrals | (2) Financial Assistance Prov | rided 🚦 | (1) Protection Order | (1) Clinical Notes | 3) (3) Related Calls |
|----------------------|-------------------------------|------------------|--------------------------|--------------------|----------------------|
| 🗌 New 🝷 🝺 Add 🍃 Remo | ve 🛛 📑 🛛 🚺 Show Report 🕶 🗌 🌀 | Filter All Items | 👻 🛛 🔂 Export to 🔹 🖉 Pri | int Preview | |
| Call Start Date 🗸 | Call Start Time | Duration (hours) | Call Type | | Created By |
| 2/7/2017 | | | | | |
| 2/7/2017 | 3:00:39 PM | 0.25 | Information and Referral | | OSNIUM\SYSTEM |
| | | | | | |



| | a: General Informati | on | 👮 (1) Childre | en/Dependants | (1) Alleged A | busers |
|------------------------|----------------------|------------|----------------------------------|---------------|------------------------|--------------|
| | 🚴 (2) Referrals | | § (2) Financial Assista | ance Provided | (1) Protection Order |) |
| | i 🗌 New 🔹 🗙 | 🚺 📑 🚺 Sho | w Report 🕶 🦳 🎯 👘 Fil | ter All Items | 👻 🕼 Export to 🔹 😡 Prim | t Preview |
| | Date Requested | - Funder | | Protection G | Irder Type | Date Granted |
| | > 2/10/2017 | OVW > | STOP | DV - Final On | der | 2/11/2017 |
| | 1 | | | | | |
| 5 🔪 🗄 🛱 🤊 (| • • • • | | Protection Ord | ler | - | |
| Home | Tools | | | | | * |
| 🗍 🗎 S | ave | 🗙 Delete | | C Refresh | Previous Protection O | |
| 💷 🔛 🔛 🔛 | ave and Close | 🖋 Validate | | | | |
| New 🖷 s | ave and New 👻 |) Cancel | Open Item | Show Report + | Wext Protection O | Close |
| Records Creation | Save | Edit | Open Related Record | View | Records Navigation | Close |
| Protection Order | | | | | | |
| A Protection order | | | | | | |
| Client | Smith , Sally | | | | | |
| Date Requested | : | | | | | - |
| Funder | | | | | | X v |
| Destanting Order Trees | | | | | | |
| Protection Order Type | : | | | | | |
| Date Granted | : | | | | | - |
| Date Expired | : | | | | | |
| Date Denied | : | | | | | * |
| | | | | | | |
| ☆ Notes | | | | | | |
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| | | | | | | ^ |





 New is used to create a Hotline or Related Call for the selected Client, click the New button in the top left hand corner of the Related Calls Tab. It will automatically fill in the Client's First Name and Last Name in the new call. Fill out the remainder of the information.

| | | | * | Caller Information | | Personal Inform | nation | | | Child(ren) information | |
|-------------------|---|----------|-------|--------------------|------------|-----------------|------------------|------------|------------|----------------------------------|---|
| Call Start Date: | 2/8/2017 - | 12:46 PM | | Victim First Name: | Selena | Exist | ng Client: Kyle, | Selena | × • | # of Children: | |
| Call End Date: | 2/8/2017 🔹 | 12:46 PM | | Victim Last Name: | Kyle | Date | Of Birth: | | * | | |
| Duration (hrs): | | 0.00 | | Phone Number: | | Estim | ated Age: | | 0 🗘 | | |
| Taken By: | OSNIUM/kebisuza | ki X. | | County: | x - | | Gender: | | х • | A Alward Information | |
| Cal Type: | | Χ. | | If Other: | | | Race: | | х • | Aduser information | |
| Victim Type: | | x - | | | | Hispan | c/Latin@: | | × • | Alleged Abuser: | |
| Type of Abuse: | | x • | | | | | Address: | | | Alleged Abuser Relationship: | |
| Caller is Victim: | | x · | | | | Marit | al Status: | | × • | First Abusive Event | |
| Service Location: | | х - | | | | | | | | | |
| Referral Source: | | х - | | | | | | | | The case was to stabile | |
| | | | | | | | | | | - space not Available | |
| 5 6 7 6 | $Q \mid \mathbf{X}_2 \mid \mathbf{X}^2$ | | • T | Times New Roman 🔹 | 3 • Normal | ~ | i 🕝 Add | Remove 🗿 🕲 | - | G Add Remove O Filter Al Items | * |
| B B 7 (* | $Q \mid \mathbf{x}_2 \mid \mathbf{x}^2$ | | | imes New Roman • | 3 - Normal | • | Name | Remove 🖉 🖉 | - 1 | G Add G Remove O Filter Allterns | • |

2. Add in the Call Type, Hotline or Information / Referral and any other relevant information

S (2) Fi

🗋 New 🔹 🗙 📑 🛅 Show Report •

3. Save and Close

Surveys

The **Surveys Tab** contains a list of surveys completed by the Client. Double Click on a Survey to see a detailed view.

To create a New Survey

- Click New in the upper left hand corner of the Surveys Tab
- 2. Select they type of survey by double clicking it

🔏 (2) Ref

- 3. Complete the Survey
- 4. Save and Close







2.

File Attachments Tab

Contains a list of all **File Attachments** associated with the Client. The File Attachments are embedded into the software.

To add a New File Attachment:

1. Click on the **New** button in the upper left hand corner on the File attachments tab.

| (2) Referrals (2) Financial Assistance Provided | 딇 (1) Protection Order | (1) | Clinical Notes |) (3) Relate | ed Calls |) (1) Surveys | 🖆 File Att | achments |
|--|---|-----------------|----------------------------------|--------------|---------------------|---------------|--|----------|
| 📋 New 🔹 🖙 Import From Scanner 🛕 Import From Webcam 🛛 🗙 📑 | G G Filter All Items ~ | 🔚 Export to 🔹 😡 | Print Preview | | | | | |
| Date File Attachment Type | Attachment | | | | | | | |
| | 🖆 📄 🖶 🥱 C | 🕤 🕗 🔻 | File | Attach | ment | | | – 🗆 🗙 |
| | Home | Tools | | | | | | \$ |
| | 🤝 🧕 | | | 5 | | C | • | × |
| ick the "dot dot dot" | Import From Import From Scanner Webcam | New Save | Save and Save and New Close * | Cancel | Open Item | Refresh F | Previous File Next File Attachment Attachme | e Close |
| | Records Creation | | Save | Edit | Open Related Record | View | Records Navigation | Close |
| | ☆ File Attachment | | | | | | | |
| | Date: | 2/8/2017 | | | | | | • |
| | File Attachment Type: | | | | | | | × - |
| | Attachment: | | | | | | | |
| | | | | | | | | |

3. This will open a dialog box that will allow the user to locate the file, click Open to add to the File Attachment record:

| @ Open | | | |
|---------------|------------------------------------|------------------|----------------|
| Look je: | 1 Computer | 💌 🕒 🦻 🗈 🖽 • | |
| 9 | Hard Disk Drives (1) | | Β |
| Recent Places | Local Disk (C) | | |
| Desktop | Devices with Removable Storage (2) | | 8 |
| Libraries | DVD RW Drive (D:) | BD-ROM Drive (E) | |
| Computer | Other [1] | | 8 |
| Network | Con 05-28 Syntem Fadder | | |
| | File pame: | × _ | Qpen Cancel |

4. Save and Close the attachment window

Child Detail View

Opening a Child profile will result in the screen below.

The Child Detail View contains information regarding the child. The data collected is very similar to a Client.

Please note instructions for the following fields:

| mary priormation | | Demographics | | | Child/Dependant Contact Information | ion | Emergency Contact Information | |
|---|--------------------|------------------------------|--------------------|-----|-------------------------------------|------------------------|----------------------------------|--|
| Intake Date: | • | Gender: | Female | х - | Parent: | Smith , Sally 🗙 👻 | Emergency Contact Name: | |
| Person ID: 50 | X * | Primary Race: | Other Multi-Racial | х • | Custody Of: | Mother × - | Emergency Contact Phone Numbers: | |
| ID #: | | Hispanic/Latin@: | Hispanic/Latino | х • | Phone Numbers: | | Emergency Contact Address: | |
| First Name: Sophia | | Sexual Orientation: | Don't Know | х - | Address of Parent: | Yukon, PA, United Stat | | |
| Last Name: Smith | | Marital Status: | Single | х • | Address: | | | |
| Middle Name: | | Primary Language: | English | х • | County: | Bullock × • | | |
| | | Limited English Proficiency: | No | - | If Other: | | | |
| Date of Birth: 2/13/2004 V Date | Of Birth Estimated | | | | Rural Status: | X * | | |
| interest Information Other Information Primary Advocate: Add @ Remove @ @ # Information Primary Advocate: Seture is definition information Primary Advocate: Seture is definition information Primary Advocate: Seture is definition information Imply and Assault As | | | | | | | | |





Parent/Guardian Information:

Click the drop down, and select an existing Client profile OR create a New Client profile to link a Client to the Child.

| A Smith, Sopria | | | | | | | | | | | | | | |
|-------------------------|----------------------------|---------|------------------|-----------|----------------|---------------|----------|------------|------------|-----------------------|------------------|----------------------------|------------|----------|
| Primary Information | Primary Information | | | | * Demographics | | | Child/Depr | endant Cor | ntact Information | | Emergency Contact Informat | ion | |
| Intake Date | | | | | Gen | der: Fenale | х - | | | Parent: Smith , Sally | × | Emergency Contact Na | me: | |
| Person ID | 50 | т | Type: Client | | | | | | | L | | | | |
| ID # | | F | ind: smith | | | | | | | | | | | × Search |
| First Name | Sophia | 1 | Available record | ls: | | | | | | | | | | |
| Last Name | Smith | | Person ID | Legacy ID | Full Name | Date Of Birth | Estimate | d Age | Gender | Ra | ce | | In Shelter | |
| Middle Name | | | > 49 | | Smith , Sally | 2/13/1967 | | 50 | Female | Ot | her Multi-Racial | | | V |
| Date Of Birth | 2/13/2004 - | V De | | | | | | | | | | | | |
| Age | 13 🗘 | | | | | | | | | | | | | |
| E: General Information | Alleged Abusers | imizati | | | | | | | | | | | | |
| Cother Information | | | | | | | | | | | | | | |
| Primary Advoca | te: Administrator | x • | | | | | | | | | | | | |
| Primary Referral Source | ce: Sexual Assault Agency/ | х • | | | | | | | | | | | | |
| 55 | in: | | | | | | | | | | | | | |
| Immigra | nt: No | × • | | | | | | | | | | | | New New |

Alleged Abuser Detail View

Opening an Alleged Abuser Profile will result in the screen below.

The Abuser profile contains significantly less information than a Client or Child profile. Most fields are drop downs, text boxes or check boxes.

Please note instructions for the following fields:

| Rerson List | mith , Sally - Client 👤 Smith , John - Alleged 🗙 | | | | | | |
|---------------------|--|------------------------------|-----------------------------------|--------------|----------------------|-----------------------|---------------|
| Primary Information | | Demographics | | | Physical Description | n | |
| Intake Date: | • | Gender: | Male | × • | Height: 6 ft 2in | | |
| Person ID: | 51 × - | Primary Race: | White | × • | Weight: 300lb | | |
| ID #: | | Hispanic/Latin@: | Non-Hispanic/Non-Latino | × - | Hair Color: Gray | x • | |
| First Name: | John | Sexual Orientation: | Heterosexual | × • | Hair Length: Medium | 1 X - | |
| Last Name: | Smith | Marital Status: | Divorced | × • | Facial Hair: Mousta | iche 🗙 👻 | |
| Middle Name: | | Primary Language: | English | X • | Eye Color: Blue | x - | No image data |
| Alternate Names: | | Limited English Proficiency: | No | · · | ✓ Glasses | Distinguishing Marks: | |
| Data Of Birth: | 2/12/1062 - IZ Date Of Birth Estimated | Alleged Abuser Contact | Information | | Contact Lenses | | |
| Ade: | 55 * | Address: | | | | ^ | |
| | | County: | | × - | | | |
| | | Phone Numbers: | | | | • | |
| | | | | | | | |
| (1) Related Clients | Services | | File Attachments | | Clinical N | lotes | Surveys |
| 🛛 🙆 Add 🛛 🙆 Remove | 📑 📔 Show Report 🕶 💿 💿 Filter 🛛 All Items | 👻 🔓 Export to | Print Preview | | | | |
| Last Name | First Nam | • | A Da | ate Of Birth | | Gender | |
| > Smith | Sally | | | | | | |
| | | | | | | | |

Photo:

- To upload a new photo: Double click on No image data to add an image
- To change an existing photo: Right click on an existing photo and select load
- To delete an existing photo: Right click on the existing photo and select delete

File Attachments

To add a New File Attachment:

1. Click on the **New** button in the upper left hand corner on the File attachments tab.

| 2 (1) Related Clients | Services | [^{16]} File Attachments | Cinical Notes | Surveys |
|--|----------------|---|---------------|---------|
| 🗌 New 🝷 🤝 Import From Scanner 🚊 Import From Webcam | 🗙 🖳 🗿 🕘 Filter | All Items - 🛛 🙀 Export to 🔹 💭 Print Preview | | |
| Date Vile Attachment Type | Attachment | | | |
| | | | | |
| | | | | |
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2. Click the "dot dot dot"

| - □ × | | | | | | | | |
|---|--|--------|---------------------|---------|---|------------|---|--|
| Home Tools | | | | | | | | |
| 🤝 🚨 📋 | | 5 | | C | • | × | | |
| Import From Import From New Scanner Webcam * | Save Save and Save and New Close 👻 | Cancel | Open Item | Refresh | Previous File Next File Attachment Attachmen | Close t | | |
| Records Creation | Save | Edit | Open Related Record | View | Records Navigation | Close | | |
| ☆ File Attachment Date: 2/8/2017 | ☆ File Attachment Date: 2/8/2017 | | | | | | | |
| File Attachment Type: | | | | | | × | • | |
| Attachment: | | | | | | Ŀ | 3 | |

- 3. This will open a dialog box that will allow the user to locate the file, click Open to add to the File Attachment record:
- 4. Save and Close

| Open | | |
|---------------|-------------------------------------|----------------------------|
| Look jn: | r Computer 💿 🥵 🤔 😳 📰 🕶 | |
| 9 | Hard Disk Drives (1) | |
| lecent Places | Local Disk (C:) | |
| | 320 GB free of 465 GB | |
| Desktop | Devices with Removable Storage (2) | |
| Libraria | A A | |
| 1 | DVD RW Drive (D:) ED-ROM Drive (E:) | |
| Computer | 4 | |
| | Other (1) | |
| Network | C on 05-210 | |
| | System Polder | |
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| | | |
| | | |
| | | |
| | | _ |
| | File pane: | • Open |
| | Files of type: | Cancel |





Shelter/Stays What is a Stay

Stays are used to track occupancy and bed night statistics.

Stays List View

Opening a list view

1. Select Residential Stays List from Lists in the Navigation menu

| \bigstar | Dashboard Overview of Clients and Program information | | | | | |
|------------|--|---|--------------------|---|-----------|--------------------------|
| \square | People A listing of all clients/children/alleged abusers | | | | | |
| ູງ | Hotline Call A listing of all calls that have been recieved at the shelter | | | | | |
| Þ | Scheduler A schedule view of all appointments by staff member | | | | | |
| *) | Surveys Create or View Anonymous Surveys | | | | | |
| Ê | Reporting A repository of all the reports available in the system | | | | | |
| h | Lists | 2 | Client Detail | • | Ö | Services |
| ~ | | | | | 2 | Residential Stays |
| 8 | Other | | Scheduler | • | () | Non-Residential Programs |
| _ | - | | Advocato's Clients | | ≙ | Victimizations |
| ٢ | Exit | 1 | Auvocate's clients | | 2 | Referrals List |
| | | | | | - | Protection Orders List |
| | | - | | | | HUD Data Collection |

2. A list view of all the Stays in the system will open.

Creating a New Stay Record

A Stay can **ONLY** be created from a Client Detail View see People/Client - Client/Adult Detail View -Programs/Stays for instruction on how to do this

| 1 | General Information | (1) Children/Dependants | (1) Alleged Abusers | (2) Victimizations | (2) Services | (1) Programs/Stays | | | | |
|---|---|-------------------------|---------------------|--------------------|--------------|--------------------|--|--|--|--|
| |] New 🔹 🗙 🔚 📋 Show Report - 🖸 Copy Stay To Child(ren) 🕘 💿 Filter (#45/ALD Entries) 🕼 Export to - 1 🕖 Print Preview | | | | | | | | | |
| | Admission Date 🗸 | Discharge Date | Туре | Service Location | | | | | | |
| > | 2/3/2017 3/17/2017 Emerge | | | | | | | | | |

HUD Entries

This module is used to collect HUD specific data elements for Project Entry, Project Update, Project Annual Assessment, Project Exit and Project Follow-up.

Press the "New" button in the HUD entry module to add a new HUD Entry.

Select the Collection Type

The HUD Collection window contains a field for Notes related to this entry, as well as three tabs for:

- 1. Person Details
- 2. Health Information
- 3. Income Sources, Benefits and Health

When Saving, validation errors may occur if required field are not filled or if fields are not filled in properly

A field that has not validated successfully will be highlighted with the

| | | Servi | ice Location | | | | | |
|------------------------------|---|--------------------------------------|--|--|--|--|--|--|
| alter | | | | | | | | |
| - | Bar Tools Reg Same Same Records Creation Same Same Additional Information Centre (Same)(Same) Centre (Same)(Same) | Delete Validate Cancel Edit | Coren Item Refersh Store Report Corg Story To Vere Vere | | | | | |
|) | Admission Date 2/13/2017 Type: Program / Locaton: Referral Source: Prior Living Situation: Housing Status At Admission: | * * * * * * * * * * * | Reason For Terminator: X - Destination (at Exit): X - | | | | | |
| es | touchoid Information Head of Household: Associated Stays (Flamity Member Stays Associated Stays As | 5 0 Filter Al II ale V Discharge | Hell ALD Entries K Hell ALD Entries Hull Data Collection Created By Date Updated Last Updated By O | | | | | |
| | | @ | | | | | | |
| | | Collection Type: Effective Date: | ters Project entry Project entry Project norby Project annual assessment Project ranual assessment Project follow up | | | | | |
| d field are not filled or if | | | | | | | | |
| ted w | ith the 😣 ico | n | Close .:: | | | | | |





Household Information/ Associated Stays

This section can be used to associate multiple Participants to a Stay. There are **three** ways to link multiple participants.

Option 1: Choose a Head of Household

If a Participant is a Minor and their Stay was associated with an Adult/Family Member

- First create a stay record for the Adult and a then create stay record for the minor.
- 2. On the minor's stay record click the appropriate Adult from the drop down list as the head of household.
- 3. Save and Close the stay record.
- 4. Save the Participant record itself

If you open the Adult's Stay record the minor will now be listed as an associated stay. Family member

Option 2: Add Associated Stays

If multiple Participants are Minors and their stay was associated with an Adult/Family member

- 1. Create the Minor(s) stay record(s)
- 2. Create the Adult/Family Member's stay record
- Click Add and select desired Participants on the Adult's Stay record
- 4. Select the desired Participant(s) and click OK
- 5. Select Save and Close on the Stay record
- 6. Select Save on the Participant record

The Participant(s) will now be added to the Associated Stays/Family members List for the Adult

The Stay record associated with the minor will be updated to include the Adult as the Head of Household.

Note: You may need to refresh the minor's participant record to see the update.

| Household Information | | |
|-----------------------|--------------------------------------|-----|
| | | |
| Head of Household: | Smith , Sally - 2/8/2017 10:39:03 AM | х - |

📋 New 🚽 👩 Add 👩 Remove 👘 🕗

Option 3: Copy Stay to Child(ren)

To copy a stay to a Child, the Client must have the Child listed as a Children/Dependent

Add the Child as a Children/Dependent

1. Open the Client record by double clicking on the Client from a person list view

| | seho | ld I | informat | ion | | | | | | | | |
|------|--|------|----------|-----------|------------|----------------------|----------------|----------------|---|-------------|--------|--|
| | | ł | Head of | Househo | old: Smi | ith , Sally - 2/8/20 | 17 10:39:03 AN | | | | х - | |
| ☆ As | ssoc | iate | d Stays | / Family | Member | Stays | | | | | | |
| : | 🗄 🐻 🚳 Filter All Items 🔹 🕞 Export to 👻 📝 Print Preview | | | | | | | | | | | |
| | Gene | eric | Person | | A | dmission Date | → Dis | charge Date | Т | ype | | |
| | | | | | | | | | I | | | |
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| | | | | | | | | | | | | |
| | 1 | ÷ ۱ | Househol | d Informa | ation | | | | | | | |
| | | | | Head of | f Househ | old: | | | | | х - | |
| | | * | Associa | ted Stay | s / Family | Member Stays | | | | | | |
| | | : | 📋 Ne | w • | 👍 Ado | d 👩 Remove | 📑 📋 Show | Report 🕶 🚳 | • | | ÷ | |
| | | | Gener | ric Perso | n | Admission D |)ate | Discharge Date | | Туре | | |
| | | Ľ | > Smith, | Sophia | | 2/8/2017 | | 3/17/2017 | | Emergency S | helter | |
| be | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |





record

2. Add the Child by clicking Add and selecting the child from the list of existing Children OR create a New Child

| 4 | 🍰 (2) Referrals 🚺 (2) | | S (2) | Financial Assistance Provided | 5. (| 1) Protection Order | (1) Clini |) (3) Related Calls | |
|--------------------------------|-----------------------|-----------|--|-------------------------------|-----------------------------------|---------------------|-----------|---------------------|-----------|
| 2 | 🗉 General Informati | n | | 👮 (1) Children/Dependants | | (1) Alleged Abusers | | (2) Victimizations | |
| 🕴 📋 New 💌 🐻 Add 🏾 🍙 Remove 🛛 📑 | | 6 | 📋 Show Report 🔻 💿 💿 Filter 🛛 All Items | | 👻 🛛 🔂 Export to 👻 🖓 Print Preview | | | | |
| | Person ID | Last Name | | First Name | Date Of Birth | A | ge | | Gender |
| > | 50 | Smith | | Sophia | 2/13/2004 | | | | 13 Female |

Add the Client as the Child(ren)'s Parent/Guardian:

1. Open the Child record by double clicking on the Child from a person list view

Home

ecords Crea

Tools

2. Select the desired Client as the Parent/Guardian.

You can now Copy a Stay to the Child(ren)!

There are three ways to copy a stay to the child(ren).

Option 1:

Option 2:

- 1. Create a New Stay record for the Client
- 2. Enter data for the Stay record
- 3. From the Stay record Click Copy Stay to Child(ren) in the ribbon
- 4. Click Yes on the pop up window

Create a New Stay record for the Client

2. Enter data for the Stay record

5. When you Save and Close the Stay Record, it will once again ask you "Do you want to copy this stay to the clients children. Click No.

If you click Yes, the following message will pop up. Select No.

matically pop up asking if you want to copy this stay to the

| Duplicate | | | |
|-------------------------|-----------------|--------------------|-----------------------|
| There is already a stay | at the same tim | e on the child, do | you want to continue? |
| | Yes | No | |
| | | | |

Yes

Copy Stay To Child(ren)

Do you want to copy this stay to the clients children?

No

Refresh Show Re

Copy Stay?



| 1 | Copy Stay? | |
|---|-------------------------------|--------------------------|
| | Do you want to copy this stay | to the clients children? |
| | Yes | No |
| l | | |

- 4. Click Yes
- Click Save and Close again 5.
- 6. Save the Client record

Client's children.

6. Save the Client record





Option 3:

If the Stay record already exists.

- 1. Open the Stays List View
- 2. Highlight the desired stay record from the list
- 3. Select Copy Stay To Child(ren)

| 🔏 (2) Referrals | <mark>\$</mark> (2) | Financial Assistance Provided | | (1) Protection | (1) Clinical Notes | | | | |
|-----------------------|---------------------|-------------------------------|---------------|-------------------|--------------------|----------------|-------------------|--|--|
| E General Information | | (1) Children/Dependants | | 1) Alle | ged Abusers | | 🛕 (2) Victimizati | | |
| 📋 New 🔹 🗙 🛛 📑 🛛 Show | Report | Copy Stay To Child(ren) | Filter HMIS/H | UD Entries | - 🕞 Export to | r 🛛 🔎 Print Pr | eview | | |
| Admission Date | 🔻 Di | scharge Date | Туре | | | | | | |
| > 2/8/2017 3/17/2017 | | | | Emergency Shelter | | | | | |

The Child will now appear as an Associated Stay/Family Members on the Stay record.

| 📰 General Information 👚 🔶 Alleged Ab | users 🛆 Victimization | Services (1) Programs/Stays | | | | | | | | | |
|--------------------------------------|--|-----------------------------|--|--|--|--|--|--|--|--|--|
| 🕴 📋 New 👻 🗙 📑 🚺 Show Rep | 🗋 New 🔻 🔀 📑 Show Report 🕶 💿 💿 Filter All Items 🔹 🖬 Export to 👻 😡 Print Preview | | | | | | | | | | |
| Admission Date 🔻 | Discharge Date | Туре | | | | | | | | | |
| > 2/8/2017 | 3/17/2017 | Emergency Shelter | | | | | | | | | |

Note: If a Child's profile is open while copying the stay, you will need to refresh the Child's profile to view the recently saved Stay.





Services What is a Service

Services is used to track any services provided to the Participant. Each service provided can be associated to one or many Persons, as well as one Staff Member.

List View of Services

 To access the list of services, click the Navigation button and select Lists → Client Detail → Services



2. A full list of Services will open

| 2 | g Person List 🕺 Smith , Sally - Client 🛛 🔯 Services List X | | | | | | | | | | |
|---|--|-------------|----------------|--------------|----------------------------------|---------------|-------------------|-----------------|------------------|---------|--|
| | Start On | Start Time | Duration (hrs) | Client | Service 🗸 | Staff Member | Method Of Contact | Service Type | Service Location | County | Session Topic List |
| | | | | | | | | | | | |
| > | 8/18/2016 | 11:00:00 AM | 1.00 | Ho, Tally | Individual Supportive Counseling | | Face-to-Face | Non-Residential | | Marengo | Individual counseling |
| | 8/1/2016 | 1:30:00 PM | 1.00 | Doe, janna | Individual Supportive Counseling | | Face-to-Face | Residential | | | |
| | 8/12/2016 | 3:00:00 PM | 1.00 | Sara, Sily | Individual Supportive Counseling | | Face-to-Face | Non-Residential | | Marengo | |
| | 2/7/2017 | 2:30:00 PM | 1.50 | Kyle, Selena | Individual Supportive Counseling | OSNIUM\SYSTEM | Mail | Non-Residential | | Lamar | Emergency financial assistance, Information a |
| | 11/9/2016 | 12:00:00 PM | 1.50 | Derek | Individual Supportive Counseling | | Telephone | Residential | | Other | Assistance with restitution, Language services |
| | 7/12/2016 | 2:30:00 PM | 1.50 | Bell, Nelly | Individual Supportive Counseling | | Face-to-Face | Residential | | Lamar | |

Creating a New Service

A single service can **only** be created from a **Client Detail View**.

- 1. Open a Client or Child profile
- Select the Shelter/Program/ Services Tab
- 3. Click New in the upper left hand corner under services
- 4. Enter the details for the service
- 5. Save and Close

Inputting data for a Service record

• Full Name: Client or Child receiving the Service provided is automatically populated

🚴 (2) Re





- Staff Member: Agency Member providing the service, the list is populated from the list of staff in the system
- Topics: Select all Topics covered during service
 - 0 Click the + to expand the list
 - Hold Ctrl to select multiple items 0

Creating a Group Service

A Batch Service can **only** be created from the **scheduler**.

- 1. Open the Scheduler
- 2. There are two options to create a New Group Service

Option 1.

Click New in the Ribbon and select Service

Select Group Service from Service drop down

| 3 | Session Topic |
|---|--|
| | × Enter text to search • Find Clear |
| | Name 🔺 |
| > | Category: OVW > SASP (Count=10) |
| | Category: OVW > STOP (Count=10) |
| | Category: VOCA > Criminal/Civil Justice System Assistance (Count=11) |
| | Category: VOCA > Emotional Support or Safety Services (Count=7) |
| | Category: VOCA > Information & Referral (Count=4) |
| | Category: VOCA > Personal Advocacy/Accompaniment (Count=10) |
| | |
| | |

New

2

8

80

8

🙎 Person List

☆ Service

80

Delete

Administrative Time

Non Working Time

Volunteer Time

🕵 Smith , Sally - Client

Outreach

Service

Staff Member: Administrator

Name

Advocacy

Group Activiti

Group Supportive Counseling

Service:

Start On:

Start Time:

Duration (hrs):

☆ Other

44 abuse

Open I

Dashboard

Hotline Call

Scheduler

Surveys

🔁 Scheduler

A schedule vie staff member

People

Overview of Clients and Program information

A listing of all clients/children/alleged

A listing of all calls that have been recieved at the shelter

w of all app

Service X

☆ Topics

A ...

х -

X

Create or View Anonymous Surveys



Option 2.

Right click on the Scheduler and Select New \rightarrow Service

Select Group Service from Service drop down





Inputting Details for the Group Service

- 1. Add details (date, time, program, service, etc.) for the Service.
- 2. Click "Click here to add a new row" to add multiple Clients to the record.

| | > | | | | | | | | | | |
|---------|-----------------|------------------------------|----------|----------------|---------------|------------|--------------|-----------|--------------------------------------|-----------------------|---------------|
| | ☆ Service | | | | | | | | | | |
| | Staff Member: | Administrator × - | ☆ Topics | | | | ☆ Clients | | | | |
| | Service: | Group Activities × - | E e . | | | | E en N | | | | |
| | Start On: | 2/16/2017 - | E Ac | dd 🕼 Remove | 600 | - | : New | • X | Filter All Items | · · | |
| | Start Time: | 12:00 PM \$ | Name | 2 | | | Generic | Person | Click here to add a n | PW FOW | |
| | Duration (hrs): | þ.oo ¢ | | | | | | | | | |
| | | | - | ☆ Clients | | | | | | | |
| | | | | New 🝷 | 🗙 📑 🚺 Sh | ow Report | 00 | | _ | | |
| | | | | Generic Person | 1 | | - Ca | ounty | | | |
| 2 | A drop d | lown list will appear. To fi | nd | I | | | × 🚽 | | | | |
| 5. | A drop d | iowithst will appear. To h | nu | Type: Per | rson | | | | | | |
| | a client, | type their name in the Fir | nd | Find: Te | ext to search | | | | | | Seard |
| | hox and | hit enter | | Available rec | ords: | | | | | | |
| | box and | Int chief. | | Pers 4 | Perso Legacy | . Intake | Full Name | Date Of | Estimate Race | Hispanic/Latino Prima | ITNC In |
| | | | | Client | 1 interna. | 8/23/2 | Test, Client | 4/16/1956 | 61 White | Hispanic/Latino | |
| | | | | Client | 31 | 8/26/2 | | | 0 | | |
| | | | | Client | 21 | 8/22/2 | Kit, Tren | 12/31/1 | 70 Black or African Ameri | can | |
| | | | | Client | 44 | . 9/6/2016 | Done, Janet | 9/6/1969 | 48 White | Non-Hispanic/ | |
| 4. | A list of s | selected clients will appea | ar | | | | | | | | |
| | in the De | tch Entry caction | | | * (| Clients | | | | | |
| | in the Ba | atch Entry section. | | | | New | - X | | Show Report 🕶 🛛 🙆 | 9 | _ |
| | | | | | | Gonoric I | lowron | | | County | |
| | | | | | | delierici | rerson | | Click here to add a new | County | |
| | | | | | | Test Chi | | | Click Here to add a Hew | 1000 | |
| | | | | | | Conith Co | a obio | | | Pullack | |
| _ | | | - | _ | 5 | Smith S | priia | | | Bullock | |
| Remo | oving a | Client from a Group |) Ser | vice | | oniur, o | any | | | Dullock | |
| To dolo | to a client : | from the Group Service | | | | | | | | | |
| to dele | le a chefit | from the Group Service | | | | De | elete | | | | |
| | | | | | | | | | | | |
| | 1 Sele | ct the client and click $^{$ | | | | | A | | where deletes the object | C | |
| | 1. 5010 | et the cheft and chek | | | | | 10 IN | u are abi | but to delete this client | Service. Do you wan | t to proceed? |
| | | | | | | | | | ······ | | |
| | 2. 2. 3 | Select Yes. | | | | | | | Yes | No | |
| | | | | | | | | | | | |
| | | | | | | | | | | | ~ |
| | 2 Click | A groo and click OK | | | | | | | | Delete | <u>^</u> |
| | S. CIICK | TAgree and click OK. | | | | | | | | | |
| | | | | | | | | | X This record wi available within | I be deleted and no | longer |
| | | | | | | | | | this is the corr | ect item to delete b | pefore |
| | | | | | | | | | continuing. | | |
| | | | | | | | | | Do you agree | to deleting this iten | n? |
| | | | | | | | | | | T Agree | |
| | | | | | | | | | | a Agree | |
| | | | | | | | | | | | |
| | | | | | | | | | | OK (| Cancel |

On the Client Detail View, the Service will show up on all Client profiles listed. If you edit the Service details on one client profile, it will edit the service details for all Clients. You must split the group service if you wish to edit the services separately.

On the Services list view, the Service will be listed for each Client. For example, if there are two Clients associated with the group service, then the list view will show the service twice.





Shelter Stats

n Related Record

X

Clos

Splitting a Group Service

Splitting an Activity is used to split a singular batch entry record into multiple records.

Nev

ords Crea

Home

How to Split an Activity

IF creating a New Service

- 1. Create a New Service
- 2. Enter information and select Clients for Batch Entry
- 3. Once multiple Clients are selected for the Batch Entry, the Split Activity button will appear in the ribbon

View

Save an Close

Tools

- 4. Click Split Activity
- 5. Select Yes



Copy

6. Save the Case Management

IF Service already exists in the system

Option 1: Split Activity from Service List View

- 1. Open the Service List View
- 2. Select the desired Service from the list
- 3. Select Split Activity from the Ribbon
- 4. Select Yes when pop-up appears
- 5. Save or Save and Close

Option 2: Split Activity from Client Profile

- 1. Open the Client Profile with the Service
- 2. Select the desired service from the Services tab
- 3. Double click on the Service to see a detailed view

| Seneral Int | formation | 👥 (1) Children/De | ependants | 🚊 (1) Allege | d Abusers | (2) Victimiz | ations | 🔯 (3) Service | 15 | (1) Programs/Stays | |
|-------------|-------------|--------------------------------|----------------|-------------------|---|----------------------------|----------------------|---------------------|----------------------------|--------------------|---|
| i 🗋 New 🔹 | · 🗙 🗟 | 📋 Show Report 🔹 🌀 🗿 🛛 Filter 🔺 | Al Items 🔹 🗌 🔒 | Export to 🔹 😡 P | rint Preview | | | | | | |
| Start On | Start Time | Duration Service | Staff Member | Method Of Contact | Service Type | Service Loca | ation Count | tγ | Session Topic List | | |
| > 2/16/2017 | 12:00:00 PM | 1.00 Group Activities | Administrator | Face-to-Face | Non-Resident | ial | Bulloc | k | | | |
| | | | | | Home Tools | | | | | | 1 |
| 4. | Sele | ect Split Activity | from the Rib | bon | New Save Save and Close | Save and New Delete Valida | ate Cancel Open Item | Refresh Show Report | Splt Clent Service Service | Close | |
| 5. | Sele | ect Yes | | Re | cords Creation Sav | Edi | t Open Related Reco | View | Records Navigation | Close | |
| 6. | Sav | e or Save and Cl | ose | | Service Client: Smith , Sally Staff Member: Administrator | | A Topics | 1210.0 | | × Notes | |
| ***Or | nce th | e Activity is spli | t, future edit | ts | Service: Group Activit Start On: 2/16/2017 | | Add C R | emove 📺 😡 🕲 | | | |
| need t | to be | done separately | /*** | | Start Time: 12:00 PM Duration (hrs): | 1 | 00 0 | | | | |

The services are no longer linked. Any edits must be completed on each client profile.



| Hα | ome | View Tools | | | | | | | | | | |
|------------------|--|---------------------|-----------------|-------------|-------------------|-------|--|------------------|--|--|--|--|
| New | X Delete | Open Item | Shelter Refresh | Show Report | Split Activity | Close | Previous Next Client Client Service Service | Filter All Items | | | | |
| Records Creation | Edit | Open Related Record | | View | | Close | Records Navigation | F | | | | |
| Rerson List | Person List Smith , Sally - Client O Scheduler O Services List X | | | | | | | | | | | |
| Start On 🔍 | Start Ti | me Duration (hr | s) Client | | | Serv | ice | | | | | |
| 7 | | | | | | | | | | | | |
| > 2/16/2017 | 12.00.0 | 0.014 | a | | | L | | | | | | |



Victimizations

What is a Victimization

A **Victimization** is a date and time record linked to a Client that is used to record victimization type and victimization details.

Victimization List View

Opening the Victimization List View

- Select Lists > Victimization List from the Navigation Menu
- 2. A full list of Victimizations will open. Double Click on an Incident to see a Detail View



| | Home | View Tools | | | | | | | | | | * |
|---------------|---|----------------------------------|---------------|----------------|-------------|-----------------------------|---------------------------------|-----------------------------|----------|------------------------------|--|---|
| New | Delete | Open Item | Shelter Refre | sh Show Report | Close | Previous Next Victimization | Filter All Items * | Filter by Text Text to sear | h Search | | | |
| Records Creat | on Edit | Open Related Record | V | liew | Close | Records Navigation | Filters | Full Text Sea | rch | | | |
| 2 Person | 🔝 Person List 🛛 🔬 Safy - Clerit 🏠 Hotmizationa List X | | | | | | | | | | | |
| Date Reported | | Date Of Victimization Client | | | Victim Type | Victimization Type | | Primary Abuser | , | Primary Abusers Relationship | | |
| 2/9/2017 | 6 | 5/21/2016 | | Smith , Sally | | Secondary | Child Physical Abuse or Neglect | | | | | |
| 2/7/2017 | 6 | 5/6/2016 | | Smith , Sally | | Primary | Adult Sexual Assault | | | | | |

Creating a New Victimization

A Victimization can only be created from a **Client Detail View**

- 1. Open a Client Detail View
- Select New in the Victimization tab
- 3. Enter the Victimization Details
- 4. Save and Close

Selecting a Main Victimization

A main victimization should be chosen on the Client profile. If there is only one victimization it will automatically default as the Main Victimization

To select a Main Victimization:

- 1. Open a Client Detail view
- 2. Select the Victimization tab
- Click Main Victimization and select a Victimization from the list

| \frown | | |
|----------|--------|--|
| | | |
| | | |
| | ······ | |

| E General Information | 👥 (1) Children/D | ependants | 1 | (1) Alleged Abusers | | (2) Victimizations | |
|-----------------------------------|----------------------------|--------------|---------|---------------------|-------------|--------------------------|------------|
| Adult Sexual Assault - Smith , Sa | ally - 6/6/2016 🗙 🗸 | New 🔹 | X 🗟 💿 📀 | Filter All Items | - 📄 Expo | ort to 🔹 😡 Print Preview | |
| A Main Victimization | | Date Reporte | d 🔻 Dai | te Of Victimization | Victim Type | Victimization Type | Primary Ab |
| | 0/7/0047 | > 2/9/2017 | 6/2 | | | | |
| Date Reported: | 2///201/ 👻 | 2/7/2017 | 6/6 | 5/2016 | Primary | Adult Sexual Assault | |
| Date Of Victimization: | 6/6/2016 - | | | | | | |
| Victim Type: | Primary X - | | | | | | |
| Victimization Type: | Adult Sexual Assault 🛛 🗶 👻 | | | | | | |





Referrals What is a Referral

A Referral is a date record used to track Referrals given by Staff to Clients.

Referrals List View

Opening the Referrals List View

- Select Lists → Client Detail → Referrals List from the Navigation Menu
- 2. A list view of all the Referrals will open

| | , | | | | | |
|------------|--|---|--------------------|---|---|--------------------------|
| * | Dashboard Overview of Clients and Program information | | | | | |
| | People A listing of all clients/children/alleged abusers | | | | | |
| 2 | Hotline Call A listing of all calls that have been recieved at the shelter | | | | | |
| E | Scheduler A schedule view of all appointments by staff member | | | | | |
| ;] | Surveys Create or View Anonymous Surveys | | | | | |
| Ê | Reporting A repository of all the reports available in the system | | | | | |
| | Lists | 2 | Client Detail | • | Q | Services |
| | - 1 | | | | 2 | Residential Stays |
| | Other • | | Scheduler | • | 1 | Non-Residential Programs |
| _ | | | Advocate's Clients | | ⚠ | Victimizations |
| C | EXIL | 1 | Autocate a cilenta | | 2 | Referrals List |
| | | - | | | 5 | Protection Orders List |
| | | - | | | Ð | HUD Data Collection |

Creating a New Referral

A Referral can only be created from a Client Detail View

- 1. Open a Client Detail View
- 2. Select New in the Referrals tab
- 3. Enter the Referrals Details
- 4. Save and Close

| 🚴 (2) Referrals | (2) Financial Assistance Provided | 🐌 (1) Protection Order |
|-------------------------|-----------------------------------|---------------------------|
| 📋 New 🔹 🗙 🛯 😡 🕑 | Filter All Items 👻 🗋 Exp | port to 🔻 📝 Print Preview |
| Referral Date 💎 Destina | ation | |
| > 2/8/2017 Food St | | |
| 2/3/2017 Legal | | |
| | | |
| | | |





Protection Orders What is a Protection Order

A Protection Order is a client linked record used to track the status of Protection Orders.

Protection Order List View

Opening a Protection Order List View

- Click Lists > Protection Order List in the Navigation Menu
- 2. A list of all Protection Orders will Open

Creating a New Protection Order

A New Protection Order must be made from the Client Detail View

- 1. Open a Client Detail View
- 2. Click New in the Protection Order tab
- 3. Enter Details
- 4. Save and Close

| | · | | | | | |
|------------|--|---|--------------------|---|---|--------------------------|
| \bigstar | Dashboard Overview of Clients and Program information | | | | | |
| | People A listing of all clients/children/alleged abusers | | | | | |
| 1 | Hotline Call A listing of all calls that have been recieved at the shelter | | | | | |
| Þ | Scheduler A schedule view of all appointments by staff member | | | | | |
| €] | Surveys Create or View Anonymous Surveys | | | | | |
| Ê | Reporting A repository of all the reports available in the system | | | | | |
| | Lists | 2 | Client Detail | | | Services |
| ~~ | | | | | 2 | Residential Stays |
| | Other 🕨 | | Scheduler | • | | Non-Residential Programs |
| | | ~ | | | | Victimizations |
| ల | Exit | 2 | Advocate's Clients | | 2 | Referrals List |
| | | | | | - | Protection Orders List |
| | | - | | | 7 | HUD Data Collection |

| | 🔬 (2) Referrals | (2) Financial Assistance Provided | 🔚 (1) Protection Order | | | |
|---|----------------------------|--|------------------------|----------------------|--|--|
| | New ▼ X ■ 0 0 | Filter All Items 🔹 👘 Export to 👻 🖗 Print Preview | | | | |
| ſ | Date Requested View Funder | | Protection Order Typ | rotection Order Type | | |
| | > 2/10/2017 OVW > | | | 2/11/2017 | | |
| | | | | | | |




os-soft

An Outreach event is a Date based record for the Staff to track Education / Training provided out to others. Each Outreach event can be associated to zero, one or many Staff Members. However, it is not advised to have zero Staff Members.

Outreach/Education List View

Opening the Outreach/Education List View

1. Select Outreach/Education from the Navigation Menu

Creating a New Outreach Event

Creating an Outreach Event from the List View

- 1. Open the Outreach List View
- Right-Click on the list view and Select New → Outreach/Education

Creating an Outreach from the Scheduler

- 1. Open the Scheduler using the Navigation menu
- 2. Right click on the scheduler, Select New > Outreach

Inputting Data for the Outreach

Audience Type: Which Audience type attended the Outreach/Education and how many of each type attended. You can enter multiple types.

Select New under Outreach/Education

Select an Audience Type from the drop down list(or create a New drop down) and enter a Count for the number of attendees of that type. Click Save and Close.

For Example:

| | , | 1 | | | | |
|------------|--|---|--------------------|---|----------|---------------------|
| * | Dashboard Overview of Clients and Program information | | | | | |
| | People A listing of all clients/children/alleged abusers | | | | | |
| J | Hotline Call A listing of all calls that have been recieved at the shelter | | | | | |
| | Scheduler A schedule view of all appointments by staff member | | | | | |
| ;] | Surveys Create or View Anonymous Surveys | | | | | |
| Ê | Reporting A repository of all the reports available in the system | | | | | |
| 6 | Lists | | Client Detail | • | | |
| 2 | Other + | | Scheduler | • | 3 | Administrative Time |
| ம | Exit | 2 | Advocate's Clients | | 30 | Outreach |
| | | | | | \$= | Training Time |
| | | | | | 2 | Volunteer Time |



Outcomes







Topic: Topics covered during the outreach event

Click **Add** to select one or multiple topics

Staff: Staff Member who attended the Outreach/ Education event

Click Add to Select one or multiple Staff Member(s)

| | ^ | : 1 | Topics | | | | | | | | | | | | | | | | | | |
|---------|----|-------|---------------|---|-----|-----|------|-----|------------|------|------|------|-----|-----|-------|----------|----|--|---|---|---|
| | | : | 🔂 Ad | d | 6 F | Rem | nove | e | | 3 | | Ð | 0 |) | | | | | | - | |
| | | | Name | | | | | | | | | | | | | | | | | - | |
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| ☆ Staff | | | | | | | | | | | | | | | | | | | | | |
| : 🔂 A | dd | 6 | Remove | 2 | 5 | • | ٢ | 1 (| <u>n</u> u | Jnlo | ck / | Acco | unt | Fi | ilter | All Iten | ns | | Ŧ | | ę |
| Vol. | F | First | Name | | | | | | | | | | - L | ast | Name | e | | | | 4 | |
| > 🗉 | A | ٩dmir | nistrator | | | | | | | | | | | | | | | | | | |





Volunteer Time What is Volunteer Time

Volunteer Time is a date and time based record for the Volunteer Staff. Each Volunteer Time can be associated with one or many Staff Members.

How to create a Volunteer Time

Creating Volunteer time from the Scheduler

- 1. Open the Scheduler
- 2. Right click on the scheduler, hover over New then click Volunteer Time

| 8 00 | | | | | |
|-------|----------|----------------|---|----------|---------------------|
| - | | New | • | <u>.</u> | Administrative Time |
| | | Go to Today | | B | Non Working Time |
| 9 | <u>.</u> | Group By | × | 3 | Outreach |
| | ≥₁ | Go to Date | | 82 | Service |
| 10 00 | | Change View To | × | 2 | Volunteer Time |
| | | - | | _ | |





Quick Start Guide

Hotline Call What is Hotline Call

Hotline Call is used to view existing call records and create new calls

List View of Calls

- 1. Select Hotline Call from the Navigation menu
- 2. A List of all calls will appear on the left side of the screen. A detailed preview of the selected call is seen on the right. Double click on a call to open a detail view.

How to Create a New Hotline Call

Creating a Hotline Call from the Call List View

Option 1

- 1. Click New on ribbon and select Hotline Call
- 2. A New Hotline Call will automatically open

Option 2

- 1. Right click on a call
- 2. Select New \rightarrow Hotline Call

If Existing Client:

 Select the Client from "Existing Direct Service Client List"









Creating a Hotline Call from the Client Detail View

1. Open a Client Detail View

| | | Seneral Information | 1) Children/Depe | ndants | (1) Alleged Abusers | (2) Victimizati | ons | (2) Services |
|----|------------------------|---------------------|-------------------------------|-------------------|--------------------------|--------------------|-------------------|--------------|
| | view | 🔬 (2) Referrals | (2) Financial Assistance Prov | rided 😽 🐻 | 1) Protection Order | (1) Clinical Notes |) (3) Related Cal | 5 |
| | | New 🔹 🕞 Add 🌘 Remov | ve 🛛 📑 🗧 🚺 Show Report 🕶 🏾 🎯 | O Filter Al Items | 👻 🕼 Export to 🔹 🕼 P | rint Preview | | |
| 2 | Cale at the Calls Tale | 2 Hotline Call | Call Start Time | Duration (hours) | Call Type | | Created By | |
| Ζ. | Select the Calls Tab | 2///2017 | 3:20:31 PM | 0.50 | Information and Referral | | OSNIUM\SYSTEM | |

Tool

3. Select New in the upper left hand corner of the Calls Tab

Converting Call to Client

- 1. Create a New Call from the Call List View
- 2. Select Convert Call to Client in the ribbon
- 3. Select Yes
- 4. Fill in the remainder of the information regarding the Client and hit Enter on your keyboard or click OK
- 5. Save the Hotline Call



6. A new Client is now created and the current Hotline Call will be added to their Client record





Next Clie Service

End Time

11:30:00 AI

12:00:00 PM

12:30:00 PM

1:00:00 PM

rde Navigat

aiting Show Repo

Start Time

11:00:00 AN

11:30:00 AM

10:30:00 AM

12:00:00 PM

Worksheet X

Start On

1/1/2016

2/2/2017

2/16/2017

About the Scheduler

The Scheduler is a MS Outlook style Calendar for the software. Activities such as Community Education, Training Time and Volunteer Time can be seen from and created within this view.

What's in the Ribbon



Open Ite

🕵 Smith , Sally - Client

Client

Test, Client

Smith , Sally

Smith, Sophia

🙎 Person List

Alabama User/Admi

Administrator

Administrator

Staff Me

View allows you to select the view in which you would like to display the information. There is a worksheet and scheduler view.

Group Bv

Group By is a view variant of the scheduler.

Users can see the Scheduler in Groups by Date

or Resource Please discover this feature yourself to see what works best for your day to day entry of information.

Scheduler features

The Scheduler has many options to customize the viewing experience and limit clutter as needed.

90

3.00

4.00

60

Staff View

A list of staff can be seen in the top right hand corner of the scheduler. Each staff has a check box "Show In Scheduler". By simply clicking the check box it will make that Staff Member will be visible in the list of Resources in the Scheduler. Unchecking Staff Member will remove them from the Scheduler. Each Staff Member has the ability to be temporarily hidden on the Scheduler; this allows quick viewing of one or two Staff Members.

Time Increments

The Scheduler can display Activities by various time increments.

Increments Area (highlighted in red)

Accessing the Increments

1. Right click on the Increments Area







- 2. Select an appropriate increment
- The current increment will be displayed with a check mark to the left of the increment

Alternate Views

- 1. Right click on the Increments Area
- 2. Hover over Change View To >
- 3. Select a view





Monthly view can be seen below



Copy and Pasting Events within the Scheduler

Events such as volunteer time, group service, etc. can be copied and pasted within the scheduler if they occur more than once.

- 1. Create an Event (Ex. Staff Development)
- 2. Click on the event in the scheduler

| | Tuesday, May 24 | Wednesday, May 25 | Thursday, May 26 |
|---|-----------------|--|------------------|
| | | | |
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| r | | | |
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| | | Staff Development/Training - Second Type | |
| | | | |
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- 3. Hit CTRL + C on your keyboard
- Click the desired time frame for the new event (it will be highlighted with blue)
- 5. Hit CTRL + V on your keyboard
- 6. The event will be created for the highlighted time frame

| Tuesday, May 24 | Wednesday, May 25 | Thursday, May 26 |
|-----------------|--|------------------|
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| | | |
| | Staff Development/Training - Second Type | |
| | | |

| Tuesday, May 24 | Wednesday, May 25 | Thursday, May 26 |
|-----------------|--|--|
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| | | Staff Development/Training - Second Type |
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| | Staff Development/Training - Second Type | |
| | | |
| | | |

Editing Events from the Scheduler

Extending and Shortening an Event from the Scheduler

- Hover over the edge of the event, until the double arrow appears
- 2. Drag the Event to make the Event shorter or longer

Moving an Event in the Scheduler

1. Left click and hold the Event

- 2 00 3 00 4 00 5 00
- 2. Drag and drop the event in the desired time frame





Shortcuts

Here are a few tips, tricks and shortcuts to navigate the software.

Entering Data

When entering data like a Client profile, many users need to switch from the keyboard to the mouse over and over again. Here are a few keyboard shortcuts that will limit the use of the mice.

Tab

Clicking the **Tab** button will move the focus of the cursor from one field to the next

- 1. Cursor is on the field Last Name
- Clicking the Tab button on the keyboard will move the cursor the First Name (next field in the list) and highlight the text

| First Name: | Client |
|-------------|--------|
| Last Name: | Test |
| | |
| First Name: | Client |
| Last Name: | Test |
| | |

Additional note, holding the **Shift** button and clicking **Tab** will bring the cursor to the previous field.

Tabbing between Tab

CTRL + Tab will move between the software tabs.

Navigating a List

- 1. Gain focus of the Tab
- 2. Use the Up and Down Arrows to gain focus of the record to be access/opened

| - | 🗋 New 🔹 🗙 📑 | 📋 Show Report 🔹 🌀 | Filter All Items | 🔹 🛛 🕞 Export to 🔹 🖓 Print Preview | | |
|---|-------------|-------------------|------------------|-----------------------------------|-------------------|---------------|
| ſ | Start On 🔻 | Start Time | Duration (mins) | Program | Service | Staff |
| 2 | 5/23/2016 | | | Shelter - Case Management Program | | |
| | 12/15/2015 | 2:30:00 PM | 15 | CRC - Child Care Program | Childcare - Legal | Administrator |
| | 12/15/2015 | 2:30:00 PM | 15 | CRC - Child Care Program | Childcare - Legal | Administrator |

3. Click Enter to open the highlighted record

More Info fields/items

When entering data for a "more info" fields like Phone Numbers or Address, there is a "dot dot dot" button

The user can move the mouse to the button and click; however, clicking the **Space bar** will achieve the same function:

- 1. Gain focus of the Address field
- 2. Press the **Space Bar**
- 3. Returning back to the previous screen by hitting **Enter**, or by clicking the **Ok** button.

Address:

Drop Downs

Selecting a value from a drop down doesn't require the use of a mouse.

Gain focus of the drop down (sometimes referred as a Lookup)

| Marital Status: X 👻 |
|---------------------|
|---------------------|



....



- 2. To select a value there are two options:
 - a. Click the **Space bar** to open the drop down
 - b. Type the first few letters of the value you are looking for
- Navigate through the list of drop downs using the up and down arrows on your keyboard. Clicking Enter will select the value.

Marital Status: Separated

| Marital Status: | | x 🚽 | |
|------------------------------|---|-------------------------|---|
| Primary Language: | | Name | |
| Limited English Proficiency: | > | Divorced | |
| | | Married | |
| | | Other | |
| | | Separated | |
| | | Single | |
| | | Widowed | |
| | | | |
| Marital Status: | | x 💌 | |
| Primary Language: | | Name | - |
| Limited English Proficiency: | | Divorced | |
| - / | | Married | |
| | | Other | |
| | > | Sep <mark>arated</mark> | |
| | | Single | |
| | | Widowed | |
| | _ | | |

х -

Additional note: clicking **ESC** while the drop down list is open will cancel the current select and revert to the value before this process. If the value was blank before this process the **ESC** button will leave it blank.

Drop downs and Searching

A drop down can have many options, when 25 or more, the drop down will default to a Search (unless modified through the advanced Model File Editor), navigating the Search can be achieved by only using the keyboard

- Gain focus of the drop down and open by either typing for search or clicking the Space bar
- 2. The cursor will be defaulted to **Find**. The user has two options:
 - a. Click Enter to see values
 - b. Type or modify the value of the text you wish to find, then click **Enter**
 - c. If more than 1 option is available, the user can use the Up and Down Arrow keys to select the desired value
- 3. To go back to the **Find**, **Shift + Tab** will focus the cursor on the **Find** text









Setup Agency-Shelter information Accessing Program Options

Please login as an Administrator (Primary User) to access and modify Program Options

To open the Program Options (or Show Options)

- 1. Click on the **Tools** tab
- 2. Click Show Options



3. On the Program Options

tab, enter any of the required information, click Ok when ready to Save

| | Shelter/Agency Information | | ☆ Other Details | |
|----------------------|----------------------------|-----------------------------|------------------------------|---------------------------------------|
| Custom Fields Editor | Shelter Name: Al | abama Demo | Name Format: | Last name then first name |
| | Agency Number: | | | Allow Conflicts |
| License File | Vendor Number: | | | Enable Field Encryption |
| | Purchase Order Number: | | Days Until Notes Are Locked: | 0 🗘 |
| Security Options | Max Stays: | 3 | \$ Follow Up Days: | 0 \$ |
| ~ | | | | ✓ Share Dashboard Stats |
| | Oranging Key Manual | Edit Nama in 'Shaw Onlines' | Default Check List: | × • |
| | Organization Name: | Edit ID in 'Shaw Ontions' | | Default Logged On Staff To Activity |
| | Organization 10: | Edit 10 in Show Options | | 🔟 Disable Copy Stay To Children |
| | | | | ☑ Disable Automatic New Call |
| | Street: | | ☆ Scheduler Settings | |
| | Suite: | | | Allow Only One Person Per Activity |
| | City: | × • | Scheduler Start Time: | 7:00 AM |
| | County: | × • | Scheduler End Time: | 7:00 PM - |
| | State: | × • | Scheduler First Day Of Week: | Sunday + |
| | Country: | × • | | Scheduler Show Full Week In Week View |
| | Zip Code: | | | |
| | A Phone Numbers | | | |
| | Home Phone: | | | |
| | Work Phone: | | | |
| | Cell Phone: | | | |
| | Fax Phone: | | | |
| | | | | |

Setup Shelter Beds/Max Stays

- 1. Locate Max Stays field and enter the numeric value of the Maximum amount of beds that the Shelter can support (ie: 50 beds = 50, 100 rooms with 150 beds = 150 beds), click OK when setup
- 2. This will update your Shelter Stats

| | Program Options | ☆ Program Options | | | | | | | |
|---|----------------------|----------------------------|-----------------------------|---------|------------------------------|-------------------------------------|---|--|--|
| | | Shelter/Agency Information | I | | Other Details | | | | |
| - | Custom Fields Editor | Shelter Name: | Alabama Demo | | Name Format: | Last name then first name | | | |
| | | Agency Number: | | | | Allow Conflicts | | | |
| | License File | Vendor Number: | | | | Enable Field Encryption | | | |
| | | Purchase Order Number: | | | Days Until Notes Are Locked: | | 0 | | |
| | Security Options | Max Stays: | | 9,999 🗘 | Follow Up Days: | | 0 | | |
| | | | | | | V Share Dashboard Stats | | | |
| | | Organization Name | Edit Nama in 'Show Ontions' | | Default Check List: | | × | | |
| | | Organization wante | currialitie in snow opports | | | Default Logged On Staff To Activity | | | |
| | | Organization ID | Edit ID in 'Show Options' | | | Disable Copy Stay To Children | | | |

Click on the Home tab





| S | | | | | | |
|---|---------------------------------------|--|---|------------------------------|--|--|
| Click on Shelter Stats | | | | | | |
| Home View Tools | | | | | | |
| New Save and Save and New Delete Validate Cancel Records Creation Save Edit Open Related Record | Shelter Stats | W Report Close Close | Previous Next Clien Client Records Navigation | it | | |
| Max Stays is now showing 50 because the Pro- | shboard | | | - = x | | |
| gram Options were updated: | General Shelter Statistics Note Board | | | | | |
| | Capacity: 0.00% Max Stays: 50 | | | | | |
| Re | Ourrent Stays: 0 maining Stays: 50 | | | | | |
| Exceeded Stay Limit Message | | | | | | |
| | Women's Shelter | | | x | | |
| Software License has exceeded the limit of Stays | The faller | ing other accurre | | | | |
| Typical Error Message when there are too many Stays: | You have This item | ing error occurred e exceeded the lim cannot be saved. | it of Stays designate | ed by your software license. | | |
| This message means that there are too many Stays (with no | | | <u>O</u> K | | | |
| Discharge Date), exceeding the Max Stays in Program Options. | | | | | | |
| Creating Staff / Leave to login to WC | | Dashboard Overview of Clie | nts and Program | | | |
| creating stail/ users to login to ws | | A listing of all clie | nts/children/alleged | | | |
| Navigating to Staff List View | | Hotine Call A listing of all cal recieved at the si | is that have been helter | | | |
| 1. Open the Navigation Menu | | A scheduler A schedule view staff member | of all appointments by | | | |
| | | Surveys Create or View A | nonymous Surveys | | | |
| 2. Select Users > Staff List | | A repository of a in the system | II the reports available | | | |
| | | Lists | • | | | |
| | | Other | • | Staff List | | |

3. A list of all of your Staff members will open

| 🚖 Dashboard | 🔯 Scheduler 🛛 🧟 Kyle | e, Selena - Cient 🕹 St | taff List 🗙 | | | |
|-------------|----------------------|-------------------------|-------------------------------|----------------|-----------|-------------------------|
| Is Active | ♀ First Name | Last Name | User Name | Staff Paper ID | Volunteer | Update Permissions |
| > 🔽 | Administrator | | Administrator | | | Allow check and install |
| V | | | OSNIUM\dharding | | | Allow check and install |
| 7 | | | OSNIUM\/hbrar | | | Allow check and install |
| v | | | OSNIUM/kebisuzaki | | | Allow check and install |
| V | | | OSNIUM\relf | | | Allow check and install |
| v | | | OSNIUM\slingam | | | Allow check and install |
| V | | | OSNIUM\SYSTEM | | | Allow check and install |
| V | | | OSNIUM\tslek | | | Allow check and install |
| V | | | TRAINING\Administrator | | | Allow check and install |
| V | | | TRAINING\AlabamaUser 1 | | | Allow check and install |
| v | Laura | Reid | TRAINING\AlabamaUser2 | 01 | V | Allow check and install |
| ¥ | | | TRAINING\AlabamaUser3 | | | Allow check and install |
| V | Rhyon | Ervin | TRAINING\AlabamaUser4 | | | Allow check and install |
| V | | | TRAINING\AlabamaUser5 | | | Allow check and install |
| V | Alabama | User/Admin | TRAINING\AlabamaUserAdmin | | | Allow check and install |
| V | | | TRAINING\AlabamaUSerReporting | | | Allow check and install |
| <u> </u> | | | | | | |

Exit

Creating a New Staff Member

1. Click **New > Staff** in the Ribbon



R

Σ

•

Field Set Create or

Configuration Option

Ouery Definition





3. Input First Name, Last Name, User Name (please note that User Name MUST be unique)

| × 🔑 Staff | |
|---|--|
| User Name: First Name: Last Name: Staff Paper ID: Update Permissions: Allow check and install | ID Active ID Show In Scheduler Volunteer Volunteer Account Lodied Change Password On First Logon |
| | Rimary Advocate To |
| | Is Administrative Can Edit Hodel |

4. Select Appropriate check boxes

Is Active: The Staff member is a current Staff member



Volunteer: The Staff member is a volunteer

- Is Active
- Show In Scheduler
- Volunteer
- Allow Edit Own Schedule Only
- Account Locked
- Change Password On First Logon

Allow Edit own Schedule only: The Staff member can edit only their own schedule

Account Locked: The Staff member is unable to login

Change Password on First Logon: The Staff member will have to change their password when they first login

5. Choose Role(s) by Clicking Add in the Roles tab

| | 🤯 Roles | |
|----|--|--|
| | 🚺 🙆 Add 🕼 Remove 🛛 🚳 🔘 Filter 🛛 All Items 🕞 👘 Export to 💌 | 🖉 Print Preview |
| | Name | |
| 6. | select desired role(s) and click OK | Sele Sele |
| 7. | Click Save. | Name > Administrators Administrators (No Customization) Read Only Staff (Limited) Staff (Read Only) Volunteer |
| 8. | Now that the new Staff is Saved with a Username and at least one Role , a Password must be generated for the Staff member to login for the first time, click Reset Password | New - OK Cancel |
| | Home View Tools | |
| | New Save and Save and New Delete Validate Password Records Creation Save Save Concel Password Concel | Open Item Refresh Unlock Stats New New New New New New New New |
| 9 | Fither record the predefined password OR clear the existing pass- | Reset Password × |
| 5. | word and enter a desired password. Click Reset Password . | Setting the user's password will create a new password for the user automatically, and at the same time disable the user's login with the old password. You must then pass on the new password to the user, so he/she can continue to work with the application. Are you sure you want to do this? |
| | | Password: P/wAn3L0 |
| | | Reset Password Cancel |





10. Now that the Reset Password has been performed, the software will automatically check **Change Password On First Login**. Save and Close to complete the new Staff Member.

If this new Staff **does not want to change their password** on first login (or the Administrator would like to keep a record of each password) then uncheck **Change Password On First Login** allowing the Staff to simply login.

Note: This created a Staff member with the default Model File (customization look and feel). Please see how to **Pull or Push Model File** if the first login of this Staff DOES NOT look like the Administrator Model File.







Full Text Search (Ribbon)

The Full Text Search available in the Ribbo on List Views.

| | • | | | | | | | | | | |
|----|------------------|------|--------|--------------------------|-------|------------------------|--------------------|-----------------|---|-------------------------------------|--|
| ic | H | ome | View | Tools | | | | | | | |
| 15 | | - | X | 7 C | X | | | | | | |
| Л | New | Сору | Delete | Shelter Refresh Stats | Close | Previous Staff Role | Next Staff Role | Hiter All Items | * | Hiter by lext lext to search Search | |
| | Records Creation | Save | Edit | View | Close | Records N | lavigation | Filters | | Full Text Search | |

The Full Text Search will search the main fields on that Object, it will not search major module or tab related information.

For example, if searching the Client List for "female", this will return Clients that have the word "female" in the Gender section on their main profile of information. The search will produce results even if the information is not displayed on the screen (either List View or Detail View)

Searching

Full Text Search is a simple text box, enter the word, words or phrase, click Search or hit the [Enter] button on the keyboard.

Removing/Clearing search

When a search has already been applied, removing or clearing the search can be accomplished by clicking the X next to the searched word, or by deleting the text in the text box and hitting the [Enter] button on the keyboard.

F

| Filtoring | Hα Hα | ome | View Tools | | | | | | | |
|----------------|------------------|------|------------|--------------------------|-------|--|--------------------|--------------------------------------|--|--|
| Filtering | | | X | 7 | | | | | | |
| Filtering from | New | Сору | Delete | Shelter Refresh Stats | Close | Previous Next Staff Staff Role Role | Filter All Items - | Filter by Text Text to search Search | | |
| the drop down | Records Creation | Save | Edit | View | Close | Records Navigation | Filters | Full Text Search | | |

is one of the more advanced areas for filtering. In this area, users are able to create **New** and **Edit** existing filters.

Filtering Drop Downs are quite powerful and useful, if used properly. If a user was to apply a filter, then close the software, the next time the user logs in the filter will still be applied. Remember to set the Filter back to All Items to see a full list of items.

Applying an existing Filter

- 1. Click the arrow near the right side of the drop down
- 2. Scroll (if necessary) to find your desired filter, then click on the selection
- 3. With the Filter applied, the List View shows only items with the desired Filter.

Remove applied Filter

- 1. Locate the filtering drop down
- 2. Select All Items

Creating a New Filter

- 1. Click the Filter drop down arrow
- 2. Select New...
- Name the Filter, enter the proper conditions, click Save and Close



| Filter | All Items 📃 |
|--------|-------------|
| | All Items |
| | Edit |
| | New |





Find

-

Clear

Find Panel

The Find Panel is a simple tool that only searches columns that are visible on the List View

| 🙎 Person List | : X | | | | | | | | | | |
|---------------|-----------|------|-----------|------------|---------------|-----|--------|-------------|-----------------|------------|---|
| × Enter text | to search | | • | Find Clear | | | | | | | |
| Person Type | Person ID | ID # | Last Name | First Name | Date Of Birth | Age | Gender | Race | Hispanic/Latino | In Shelter | |
| Alleged abuse | r 6 | | Guy | Bad | 6/2/1960 | 57 | Male | White | | | - |
| Alleged abuse | r 51 | | Smith | John | 2/13/1962 | 55 | Male | White | Non-Hispanic/ | | |
| Child | 50 | | Smith | Sophia | 2/13/2004 | 13 | Female | Other Multi | Hispanic/Latino | 1 | |
| Client | 5 | 0002 | Bell | Nelly | 2/13/1961 | 56 | Female | White | | | |
| Client | 49 | | Smith | Sally | 2/13/1967 | 50 | Female | Other Multi | Hispanic/Latino | 1 | |

Showing the Find Panel

- 1. Right click on a **Column Heading**
- 2. Select Show Find Panel

| | Sally | 2/13/196 | 7 | 50 Female | Other Multi | Hispanic/Latino | | | | |
|---|-----------------|---------------|---------|-----------|-------------|-----------------|-------------------|------------------------|--|--|
| | 👷 Person List 🗙 | | | | | | | | | |
| | Person Type | Person ID 🛛 🤜 | ID # | Last Name | | First Name | | D-1- Of B:-1- A | | |
| | Alleged abuser | 6 | | Guy | | Bad | ź∔ | Sort Ascending | | |
| | Alleged abuser | 51 | | Smith | | John | Ă↑ | Sort Descending | | |
| | Child | 50 | | Smith | | Sophia | | Clear All Sorting | | |
| | Client | 5 | 0002 | Bell | | Nelly | 2 | Group By This Column | | |
| | Client | 49 | | Smith | | Sally John | Show Group By Box | | | |
| | Alleged abuser | 48 | | Doe | | | | | | |
| | Child | 47 | | Doe | | Dill | | Hide This Column | | |
| | Child | 46 | | Kyle | | Sarah | Ē | Column Chooser | | |
| | Client | 45 | | Kyle | | Selena | H | Best Fit | | |
| | Client | 44 | | Done | | Janet | | Best Fit (all columns) | | |
| | Client | 43 | | | | Derek | 7 | Filter Editor | | |
| | Alleged abuser | 42 | | | | | U | Show Find Danel | | |
| > | Child | 41 | | Shelter | | Child | | Show Find Parlet | | |
| | Client | 40 | Interna | Shelter | | Adult | | Show Auto Filter Row | | |

Searching the Find Panel

To search with the Find Panel, enter the de-

sire text into the text box.

In the example we are searching for "Female"

Removing/Clearing the Find Panel Text

Removing or clearing the text on the Find Panel can be accomplished two ways

× Female

 Click the Clear button on the Find Panel, this will remove the text and clear the search



2. Delete the existing text and press Enter on the keyboard

Searching with the history in the Find Panel

Each search performed with

the **Find Panel** will added to a temporary history list that is cleared when the tab is closed

 ×
 smith
 Find
 Clear

 dient

 P
 smith

 Al
 female
 John

To access the history, click on

the drop down arrow to the right of the Text Box and select an entry from the search history list





Quick Auto Filtering

This technique can be used to quickly filter out a specific column of data, much like the **Auto Filter Row**. Note: more than 1 column can be filtered, simply repeat the steps below.

| 1. | Hover the | mouse over | а | Column | Heading |
|----|-----------|------------|---|--------|---------|
| | | | | | |

Start

Start On

8/18/2016

8/1/2016

8/12/2016

2/7/2017

- Within the Column Heading, click the (filter icon)
- 3. The filtering options will now appear in a drop down like control
- 4. Select one of the options to only see the selected option

| On | | S | tart Ti | me | Dura | itic | on (hrs) | Client | | | | | |
|----|------------|---------|---------------------|----------|----------------|------------|------------|------------|--------------|-------------|---------------|-----|--|
| | | | | | | | | | | | | | |
| | Sta | art Tin | ne | Duration | (hrs) | Cl | ient | | | L | Service | | |
| | | | | | | | | | | | (Custom) | | |
| | 11 | :00:00 | AM | | 1.00 Ho, Tally | | | | | Bell, Nelly | v | | |
| | 1:30:00 PM | | | | 1.00 | Doe, janna | | | | | Billy, Little | v | |
| | 3:0 | 00:00 F | PM 1.00 Sara, Silly | | | | | Doe, janna | v | | | | |
| | 2:3 | 30:00 F | м | | 1.50 | Κv | le. Selena | | | | Done, Jane | t v | |
| , | | Start | On | Start Ti | me | | Duration | (hrs) | Client | | | ٩ | |
| • | 9 | | | | | | | | Test, Client | | | | |
| | | 8/5/2 | 016 | 8:30:00 | AM | | | 0.50 | Test, Client | | | | |
| | | 8/10/ | 2016 | 11:00:0 | 0 AM | | | 0.50 | Test, Client | | | | |
| | | 8/10/ | 2016 | 11:00:0 | 0 AM | | | 0.50 | Test, Client | | | | |
| | | 8/5/2 | 016 | 11:30:0 | 0 AM | | | 0.50 | Test, Client | | | | |
| | | 1/1/2 | 016 | 11:00:0 | 0 AM | | | 0.50 | Test, Client | | | | |
| | | 8/5/2 | 016 | 11:30:0 | 0 AM | | | 1.00 | Test, Client | | | | |
| | | 1/1/2 | 016 | 11:30:0 | 0 AM | | | 0.50 | Test, Client | | | | |
| | 1 | | | | | | | _ | | S | GUM=4.00 | | |
| | | | | | | | | - | he i ch | .1 | | _ | |
| | | | | Ľ | ₩ [G | en | eric Pers | onj = | Test, Clien | t | | | |

Note, at the bottom of the List View, there is now a **Filtering Summary** that can be used to enable or disable the applied filter in this example

Filtering Summary

The Filtering Summary is a control panel for **Auto Filtering Row** and **Quick Auto Filtering**, but it does not have any relation with the **Filtering (Drop Down in Ribbon)** in the Ribbon. Please be aware that the user may need to remove a Filtering (Drop Down in Ribbon) in order to use **Auto Filtering Row** and/or **Quick Auto Filtering** and vice-versa

Filtering Summary can be found at the bottom of the screen.

| New Delete Open Item Selter Refresh Show Report Split Cose Cose Cose Full Text Cose Edt Open Related Record Vev Cose Cose Filters Full Text Person List Services List X Yev Cose Filters Full Text V Services List X Yev Cose Filters Full Text V Services List X Yev Cose Full Text Service V Services List X Yev Cose Full Text Service | | | н | ome | | View | Tool | s | | | | | | | | | | | \$ |
|---|----|---------|-----------|-------|-----|-------------|----------|--------|------------------|--------|-------------|--------|-------------------|---------|--------|--------|-------------|-------------------|-------------------|
| New Records Creation Edit Open Related Record Provide and the second of the secon | | ~ | | | , | F | - | | | 6 | | | EV. | | | | | | |
| New Records Creation Delete Edit Open Related Record Stats Yew Close Pitters Full rext Search * Image: Services Creation Edit Open Related Record View Close Re * Service Service Statif Member Method Servic County Session Topic List Image: Service Staff Member Method Servic Servic County Session Topic List Image: Service Staff Member Method Servic County Session Topic List Image: Service Service Service Service Non Bullock County Session Topic List Image: Service 1.00 Smith , Sally Group Activities Administrator Face-t Non Bullock Counseling services/sup Image: Z/ 1.00. Smith , Sally Individual Supporti Administrator Face-t Non Bullock Individual counseling, Tr Image: Superior Superior Superior Superior Superior Superior Superior Superior | | | | X | × | L | | | 7 | C | · 🗉 | | Y | | 1 | | | | |
| Records Creation Edit Open Related Record View Close Re Person List Services List X Service Staff Member Method Servic County Session Topic List V Smith , Saly South , Saly Group Activities Administrator Face-t Non Bullock 2/ 10: 1.00 Smith , Saly Group Activities Administrator Face-t Non Bullock 2/ 10: 2.00 Smith , Saly Group Activities Administrator Face-t Non Bullock Counseling services/sup 2/ 10: 2.00 Smith , Saly Individual Supporti Administrator Face-t Non Bullock Individual counseling, Tr | | Ner | w | Delet | e | Ope | en Item | | Shelter Stats | Refres | h Show Rep | port / | Split Activity | Close | • | Filter | s Fu Sei | II Text arch ≭ | |
| Person List Services List X •••••••••••••••••••••••••••••••••••• | Re | cords (| Creation | Edit | : | Open Rel | lated Re | ecord | | | View | | | Close R | .e | | | | |
| Image: Star Dur Client V Service Staff Member Method Servic County Session Topic List V Smith , Sally Smith , Sally Group Activities Administrator Face-t Non Bullock 2/ 10: 1.00 Smith , Sally Group Activities Administrator Face-t Non Bullock 2/ 10: 1.00 Smith , Sally Group Activities Administrator Face-t Non Bullock Counseling services/sup 2/ 10: 2.00 Smith , Sally Individual Supporti Administrator Face-t Non Bullock Individual counseling, Tr | | 🔔 Pe | rson List | | Q | Services | List 🔾 | < | | | | | | | | | | | - |
| V Smith , Sally 2 2/ 12: 1.00 Smith , Sally Group Activities Administrator Face-t Non Bullock 2/ 10: 1.00 Smith , Sally Group Activities Administrator Face-t Non Bullock 2/ 10: 2.00 Smith , Sally Group Activities Administrator Face-t Non Bullock Counseling services/sup 2/ 10: 2.00 Smith , Sally Individual Supporti Administrator Face-t Non Bullock Individual counseling, Tr | | 🔻 | Star | Dur | Cli | ent | ٧ | Servi | ce | | Staff Memb | ber | Method | Servi | . Serv | vic | County | Session | Topic List |
| 2/ 12 1.00 Smith , Sally Group Activities Administrator Face-t Non Bullock 2/ 10: 1.00 Smith , Sally Group Activities Administrator Face-t Non Bullock 2/ 10: 2.00 Smith , Sally Group Activities Administrator Face-t Non Bullock Counseling services/sup 2/ 10: 2.00 Smith , Sally Individual Supporti Administrator Face-t Non Bullock Individual counseling, Tr | 9 | | | | Sm | ith , Sally | | | | | | | | | | | | | |
| 2/ 10: 1.00 Smith , Sally Group Activities Administrator Face-t Non Bullock Counseling services/sup 2/ 10: 2.00 Smith , Sally Individual Supporti Administrator Face-t Non Bullock Individual counseling, Tr | > | 2/ | 12: | 1.00 | Sm | ith , Sally | | Group | Activities | ; | Administrat | or | Face-t | . Non | | | Bullock | | |
| 2/ 10: 2.00 Smith , Sally Individual Supporti Administrator Face-t Non Bullock Individual counseling, Tr | | 2/ | 10: | 1.00 | Sm | ith , Sally | | Group | Activities | ; | Administrat | or | Face-t | . Non | | | Bullock | Counseli | ng services/sup |
| SU 3 | | 2/ | 10: | 2.00 | Smi | ith , Sally | | Indivi | dual Supp | orti | Administrat | or | Face-t | . Non | | | Bullock | Individua | al counseling, Tr |
| SU 3 | | | | | | | | | | | | | | | | | | | |
| | | | | SU | | | | | | | | 3 | | | | | | | |
| | | | | SU |] | | | | | | | 3 | | | | | | | |





Remove/Delete filtering

| × ▼ [Generic Person] = 'Smith , Sally ' ・ | Edit Filter |
|--|-------------|
| Temporarily Enable or Disable filtering string | |
| × 💽 [Generic Person] = 'Smith , Sally' 👻 | Edit Filter |
| Current Filter (enabled or disabled) | |
| × 🗑 [Seneric Person] = 'Smith , Sally ' + | Edit Filter |
| Access Filter history list | |
| × ☞ [Generic Person] = 'Smith , Sally ' | Edit Filter |
| Filter history list (from arrow in example above) | |
| X V [Generic Person] = 'Smith , Sally ' User: Generic Person] = 'Smith , Sally ' And [Activity Session.Service] = 'Group Activities' | Edit Filter |
| Advanced Edit Filter | |
| × 👿 [Generic Person] = 'Smith , Sally' → | Edit Filter |





Initial Value on a Field

What is an Initial Value

An Initial Value is data that will be automatically entered when creating a new entry

For Example: An Initial Value for Gender could be set to Unknown. The new Client's Gender would automatically be Female. If Female is incorrect, then the user would simply change the Gender.

Set Initial Value

Note: Only Staff with Agency Administrators roles can set Initial Values

- 1. Open the Detail View where the Initial Value is requested
- 2. Locate the **field** on the Detail View
- 3. Click the field until the field is highlighted
- 4. Select the value desired for the Initial Field
- 5. Right Click on the field then select Set As Initial Value
- 6. Close the Detail View (Save as needed), create a new record to confirm **Set As Initial Value**

Note: Initial Value can be set on the following types of Fields: Text Box, Long Text Box, Drop Down, Number, Number with Decimals and Dates.

Clear Initial Value

- 1. Open the Detail View that the Initial Value is applied
- 2. Locate the **field** on the Detail View
- 3. Click the field until the field is highlighted
- 4. Right click on the field and Select Clear Initial Value

| Demographics | | | | |
|------------------------------|----------------------|---|---------------------|-----|
| Gender: | Female | | | × - |
| Primary Race: | Asian | 5 | Undo | х - |
| Hispanic/Latin@: | Non-Hispanic/Non-Lat | X | Cut | х • |
| Sexual Orientation: | Don't Know | 6 | Сору | х - |
| Marital Status: | Separated | | Paste | х • |
| Primary Language: | English | × | Delete | х - |
| Limited English Proficiency: | N/A | | Select All | - |
| | | ٠ | Clear Initial Value | |
| | | 5 | Open Item | |
| | | | Make Field Required | |
| | | _ | | |



| Gender: Fem | ale | | | | x - |
|-------------|---|------------------|--------|---|------------|
| | ☆ Demographics | | | | |
| | Gender: Fe Primary Race: As | Female | 2 | Undo | x • x • |
| | Hispanic/Latin@: Sexual Orientation: | Non-Hispanic/Nor | ж Ф | Cut Copy | × • |
| Ie | Marital Status: | Separated | | Paste Delete | X • |
| | Primary Language: Limited English Proficiency: | English N/A | | Select All | × * |
| | | | | Set as Initial Value Make Field Required | |
| w record to | | | _ | | |
| | | | | | |



Required Fields What is a Required Field

A **Required Field** is a Rule that can setup on specific Detail Views so that Staff is informed on Save if one or many fields that are missing values.

Reporting is the number one reason to have Required Fields setup, this will allow a more accurate reporting period because some field (ie: Gender) default to blank/empty, but many Staff require this data even if it is not known (ie: Unknown).

Make a Required Field

Note: Only Staff with Agency Administrators roles can set Required Fields

- 1. Open the **Detail View** that the Required Field is to be setup
- 2. Locate the **field** on the Detail View
- 3. Right Click on the field then select Make Field Required
- 4. A Required Field Options box will appear. Enter a Custom Description that will appear when a user attempts to save their work without filling in the required field. Choose the result type from the drop down
 - a. Error: Cannot save without entering a value
 - **b.** Warning: Can Save without entering a value but the user is prompted
 - c. Information: The user will see an information icon next to the required field if they save without closing the window

| | ☆ Primary In | form | nation | | | | | | |
|--|-----------------|-------|----------------------------|-------------------------------------|-----------------------|--|--|--|--|
| | Intake Date: | 2/7 | /2017 | | | | | | |
| | Person ID: | 45 | | | X • | | | | |
| | ID #: | | | | | | | | |
| _ | | | | | | | | | |
| 5 | First Nam | e: | | | | | | | |
| | Last Nam | e: | ` | Undo | | | | | |
| | Middle Nam | e: | X | Cut | | | | | |
| | Date Of Birt | b. | | Сору | Birth Estimated | | | | |
| | Sace of birt | ••• | | Paste | on or coulidico | | | | |
| | Ag | e. [| × | Delete | | | | | |
| | | | | Select All | | | | | |
| | | | 1 | Set as Initial Value | | | | | |
| | | | | Make Field Required | | | | | |
| 🔊 R | equired Field | Opt | tions | | □ X | | | | |
| | | | | | | | | | |
| Cus | tom Description | 1: | | | | | | | |
| | Result Type | : E | Error | | • | | | | |
| | | 8 | 7 Make this field required | d everywhere | | | | | |
| \$ | About Result | TVC | Des | | | | | | |
| | | | | مناعد والعانية والعانية | | | | | |
| l ' | S Error - | me | view cannot be closed un | tui ute tielu is tileu itt | | | | | |
| | Warning | g - T | he view can be closed wi | ithout filling in the field but the | user will be prompted | | | | |
| Information - The user will see an information icon if they save without dosing the view | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | OK Cancel | | | | |
| | | | | | Cancer | | | | |

5. Now that the field is Required, the field will show a Red border around the field. This is used to visually indicate that this is Required

|--|

6. If the required field is empty, the system will now prompt users that the field is required depending on which level of requirement you chose (ie. Error, Warning, Information)

First Name:

Clear Required Field

- 1. Open the **Detail View** that the Required Field is to be setup
- 2. Locate the field on the Detail View (ie: First Name)
 - a. If the field is NOT visible on the Detail View the Staff member will need to customize the Detail View to have the field, close the Detail View and reopen. Right clicking on the newly added field will not work until reopening of Detail View.
- 3. Right Click on the field then select Clear Field Required







Modifying/Adding drop down options

Drop Down values can only be added to a limited number of drop downs in the system.

Adding a New Drop Down Value

2. Enter Name for New drop down

1. Select the arrow next to the desired drop down and Click New



☆ Demographics

Gender:

Hispanic/Latin@

Marital Status:

Primary Language: Russian

Sexual Orientation:

Limited English Proficiency: N/A

Primary Race: American Indian or Na

3. Save and Close

Deleting a Drop Down Value

1. Select the desired drop down that you wish to delete

New

lecords Crea

- 2. Right Click on the field and select Open Item
- 3. Click Delete
- 4. Click Yes

| Home Tools | | * | | | | | | | | | | | |
|----------------------------------|---|-------------------------|--|--|--|--|--|--|--|--|--|--|--|
| w Save Save and Save and Close | New Delete Validate Cancel Refresh Previous Next Race Cancel Race | | | | | | | | | | | | |
| Creation Save | Edit View Records Navigation Close | | | | | | | | | | | | |
| American Indian or Alaska Native | Delete (Ctri+D) | | | | | | | | | | | | |
| Delete | | | | | | | | | | | | | |
| Delete | | | | | | | | | | | | | |
| You | You are about to delete this State. Do you want to proceed? | | | | | | | | | | | | |
| | Delete | 23 | | | | | | | | | | | |
| | This record will be deleted and no l available within the system. Please this is the correct item to delete be continuing. | onger ensure fore | | | | | | | | | | | |

Undo

Cut

Select All 📑 🛛 Open Item

6 Сору

Paste

× Delete

- 5. Select I Agree and Click OK
- 6. Save the entire Record to update the changes.



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Column Chooser

The Column Chooser allows you to choose which columns you would like in a table in a list view.



6. Select the desired value with your mouse and hold the mouse down while you drag the value to the correct spot in the column header. Release the mouse to drop the value into the header. The two arrows on the List View Columns will show where the field will be placed when the mouse button is released.

| Alternatively, double click the | | | | | | | |
|------------------------------------|-------|-----------------|-------------|-------------------|--------------------|------------------|---------|
| value and it will be automatically | | | Ł | J | | | |
| added to the end of the list | • | Staff Member Ap | oproved 💎 🤊 | Method Of Contact | Service Type | Service Location | County |
| | | Laura Reid | 1 | | | | |
| | eling | Laura Reid | | Face-to-Face | Non-Residential | | Marengo |
| | aling | Laura Reid | | Face-to-Face | N Resid Customiz | ration x | Marengo |
| | eling | Laura Reid | | Telephone | Residenti 🌔 Approv | ved | Other |
| | eling | Laura Reid | | Face-to-Face | Residenti | | Lamar |
| | aling | Laura Reid | | Face-to-Face | Non-Resid | | Marengo |
| | aling | Laura Reid | | Face-to-Face | Non-Resid | | Lamar |
| | eling | Laura Reid | | Face-to-Face | Non-Resid | Add | Marengo |
| | eling | Laura Reid | | Face-to-Face | Non-Resid | Remove | Marengo |
| | 1 | Laura Reid | | Face-to-Face | Non-Resid | Nemove . | Marengo |
| | | Laura Reid | | Face-to-Face | Non-Residential | | Marengo |
| | | Laura Reid | | Face-to-Face | Non-Residential | | Marendo |





| | | Staff Member | ₽ A | pproved | Method Of Conta | ct |
|---------|--|-------------------------|-------------|-------------|-----------------------------|-----|
| 7. | The value will now be present as a column | Laura Reid | | B | | |
| | | Laura Reid | | | Face-to-Face | |
| | | Laura Reid | | | Face-to-Face | |
| | | Laura Reid | | | Telephone | |
| | | | Customiza | tion | ns here to | < |
| 8. | Click the X to exit the Customization Window. Your change matically. | es will be saved auto- | customize l | ayout | | |
| | | | | Add | | |
| Jonani | the above stone until all the desired fields are sustamized | | | Rem | ove | 1 |
| Repear | the above steps until all the desired helds are customized | | | | - | |
| onto th | ie List View. | Staff Member | Approved | Sort A | of Contact Some scending | - |
| | | | | Sort D | escending | |
| | | | | Clear 4 | All Sorting | |
| Hidir | g Columns from a List View | | - | S Group | By This Column | |
| Thoro ' | are two options to remove a column from a List View | | | Show | Group By Box | |
| inere d | | | - F | Hide T | his Column | |
| Option | 1 | | Ę | 🖥 Colum | nn Chooser | |
| 1 | Right click on the Column Heading | | | | | |
| 1. | hight check on the column neading | | | | | _ |
| 2. | Select Hide This Column | Staff Member | Approved | , Sort As | Cending | 1 |
| | The Customization window does not need to be visible/ | | Z | Sort De | scending | |
| | anabled for this task | | | Clear Al | ll Sorting | |
| | | | 2 | Group F | By This Column | |
| Option | 2 | | - | Show G | roup By Box | |
| | - | | | Hide Th | nis Column | |
| 1. | Right click on the Column Heading | | Ē | Colum | n Chooser | |
| 2 | Calent Calence Changes | | | | | 1 |
| Ζ. | Select Column Chooser | | _ | Appro | Method Of Contac | ct |
| | | | | Ĩ | Face-to-Face | = |
| | | | | | Face-to-Face | |
| | | | Cust | omization | Face-to-Face | |
| 3. | Click and hold the column you wish to remove, drag it to the | he Customization win- | Drag | and drop c | umns here to | |
| | dow | | custo | mize layout | | |
| | | | _ | Approved | d | |
| | | | | A | | |
| | | | | Re | emove | |
| | | | Custo | mization | Face-to-Face | |
| | | | ▶ Арр | roved | | |
| 4. | Click X to exit the Customization Window. Your changes w | Ill be saved automatica | al- | | | Iy. |
| | | | | | | |
| | | | | | 44 | |
| | | | | Re | move | |
| | | | | | | |





Quick Tips when customizing

- 1. Never customize a List View (ie: Person Activity) when you have 2 or more of the same List Views open. This may cause an issue when you close out of the software and log back in because the software will select the other List View as the customization, thus losing the work the Staff member attempted to complete.
- 2. Never customize when the Staff member is logged in on another Workstation (two logins in use of the same username), this may cause and issue when you close the software (as well as the other workstation), the software will select one of the two to save, thus losing the work the Staff member(s) attempted to complete.





Sorting a List View by various fields

List Views can be sorted by not only 1 field but as many as needed. By default, most List Views will not be sorted; this can be determined by looking for an arrow in each Column in the List View

Sorting views

No Sorting

| | Person Type | Person ID | ID # | Last Name | First Name | Date Of Birth | Age | Gender | Race | Hispanic/Latino | In Shelter |
|---|----------------|-----------|---------|-----------|------------|---------------|-----|--------|---------------|-----------------|------------|
| 5 | | | | | | | | | | | |
| | Client | 40 | Interna | Shelter | Adult | 10/8/1968 | 49 | Female | Black or Afri | | |
| | Alleged abuser | 22 | 3987 | Doedoe | Johnnie | 8/2/1964 | 53 | Male | Don't Know | | |
| | Alleged abuser | 27 | | House | Abuser | 8/26/1968 | 49 | Male | Don't Know | | |
| | Alleged abuser | 42 | | | | | 0 | | | | |
| | Child | 46 | | Kyle | Sarah | 2/13/2009 | 8 | Female | Asian | Non-Hispanic/ | 1 |
| | Client | 1 | | Test | Client | 4/16/1956 | 61 | | White | Hispanic/Latino | V |
| | Client | 31 | | | | | 0 | | | | |
| | Client | 21 | | Kit | Tren | 12/31/1947 | 70 | Male | Black or Afri | | |
| | Client | 36 | 000-00 | Stewart | Cindi | 9/6/1969 | 48 | Female | White | | |
| | Client | 44 | | Done | Janet | 9/14/1991 | 26 | Female | White | Non-Hispanic/ | V |
| | Child | 50 | | Smith | Sophia | 2/13/2004 | 13 | Female | Other Multi | Hispanic/Latino | V |

First Name Sorted Ascending (A-Z)

| | Person Type | Person ID | ID # | Last Name | First Name 🔺 | Date Of Birth | Age | Gender | Race | Hispanic/Latino | In Shelter | |
|---|----------------|-----------|---------|-----------|--------------|---------------|-----|--------|---------------|-----------------|--------------|---|
| 7 | | | | | | | | | | | | • |
| | Alleged abuser | 27 | | House | Abuser | 8/26/1968 | 49 | Male | Don't Know | | | - |
| | Alleged abuser | 3 | | Test | Abuser | | 0 | | | | | |
| | Client | 40 | Interna | Shelter | Adult | 10/8/1968 | 49 | Female | Black or Afri | | | |
| | Alleged abuser | 6 | | Guy | Bad | 6/2/1960 | 57 | Male | White | | | |
| | Client | 20 | | Воор | Betty | 8/26/1965 | 52 | Female | Native Hawa | | | |
| | Child | 25 | | | Billy | 8/24/2013 | 4 | Male | White | Don't Know | \checkmark | |
| | Child | 37 | | Stewart | Bobby | | 0 | Female | White | | | |
| | Child | 2 | | Test | Child | | 0 | | | | \checkmark | |

Last Name Sorted Descending (Z-A)

| | Person Type | Person ID | ID # | Last Name 🔍 | First Name | Date Of Birth | Age | Gender | Race | Hispanic/Latino | In Shelter | |
|---|----------------|-----------|--------|-------------|------------|---------------|-----|--------|---------------|-----------------|--------------|---|
| 7 | | | | | | | | | | | | - |
| | Client | 19 | | TODD | TONY | 8/19/1980 | 37 | Female | Asian | | | |
| | Alleged abuser | 3 | | Test | Abuser | | 0 | | | | | |
| | Child | 2 | | Test | Child | | 0 | | | | V | |
| | Client | 1 | | Test | Client | 4/16/1956 | 61 | | White | Hispanic/Latino | \checkmark | |
| | Client | 16 | | Tall | Walking | 2/1/1985 | 32 | Female | American In | | \checkmark | |
| | Child | 37 | | Stewart | Bobby | | 0 | Female | White | | | |
| | Client | 36 | 000-00 | Stewart | Cindi | 9/6/1969 | 48 | Female | White | | | |
| | Client | 7 | | Star | Ruby | 10/11/1980 | 37 | Female | Black or Afri | | | |
| | Alleged abuser | 35 | | Son | Michael | 8/30/1960 | 57 | Male | Native Hawa | | | |
| | Alleged abuser | 51 | | Smith | John | 2/13/1962 | 55 | Male | White | Non-Hispanic/ | | |
| | Client | 49 | | Smith | Sally | 2/13/1967 | 50 | Female | Other Multi | Hispanic/Latino | V | |
| | Child | 50 | | Smith | Sophia | 2/13/2004 | 13 | Female | Other Multi | Hispanic/Latino | \checkmark | |
| | Child | 41 | | Shelter | Child | 8/8/2013 | 4 | Female | Black or Afri | | | |





Clear All Existing Soring

To **Clear Sorting** for all Columns, right click on a Column and select **Clear Sorting**

| | | Person Type | Person ID | ID # | Last Name | | First Name | Date Of Birth |
|---|---|----------------|-----------|------|-----------|----|----------------------|---------------|
| 6 | 7 | | | | | Ź↓ | Sort Ascending | |
| ſ | | Client | 19 | | TODD | Z↓ | Sort Descending | 8/19/1980 |
| | | Alleged abuser | 3 | | Test | | Clear Sorting | |
| | | Child | 2 | | Test | 8 | Group By This Column | |
| | | Client | 1 | | Test | - | Show Group By Box | 4/16/1956 |
| | | ale i | | | ÷ 0 | | Short Group by box | ali kaar |

Sort by one Field

To sort by one field (and remove all previous sorting), locate and **click** on an existing **Column Heading Click one time** to sort Ascending (A-Z); **click a second time** on the same column heading to reverse the sort order to Descending (Z-A).

Sort by one or More Fields

- 1. Right click on an existing **Column** Heading
- 2. Select Sort Ascending or Sort Descending
- 3. Repeat on another **Column Heading** to further sort.

| Client | | | e Date | Funder | Туре | |
|---------------|---|-------------------|-------------------|----------------------|-------------------|-------------------|
| Test, Client | 2 | Sort Ascending | | | Emergency Shelter | |
| Tall, Walking | Z↓ A↓ | Sort Descending | | | Lodging & Homel | |
| Smith, Sophia | | Clear Sorting | 7 | | Emergency Shelter | |
| Smith , Sally | Clear All Sorting Group By This Column | 0 | Clear All Sorting | 7 | | Emergency Shelter |
| Person, Test | | | t 👝 | Group By This Column | | |
| mom, test | | Show Group Py Poy | | | Emergency Shelter | |
| Kyle Selena | | зном бгоир ву вох | | | Emergency Shelter | |

| Client | 🔨 Admission Date 🔺 | Discharge Date | Funder | Туре |
|---------------|--------------------|----------------|--------|-------------------|
| Test, Client | 7/1/2016 | | | Emergency Shelter |
| Tall, Walking | 2/1/2017 | | | Lodging & Homel |
| Smith, Sophia | 2/8/2017 | 3/17/2017 | | Emergency Shelter |
| Smith , Sally | 2/8/2017 | 3/17/2017 | | Emergency Shelter |





Group by Box

Grouping is a feature in the software where the user can group common information, allowing an enhanced visual understanding of the information

To sort a Grouping, the Group By Box must be visible

- 1. Right click on a Column Heading
- 2. Select Show Group By Box,

| | Client 🔍 | Admission Dat | | ischarne Date Funder |
|---|---------------|---------------|----|------------------------|
| | Test, Client | 7/1/2016 | Ź↓ | Sort Ascending |
| | Tall, Walking | 2/1/2017 | Z↓ | Sort Descending |
| | Smith, Sophia | 2/8/2017 | | Clear Sorting |
| | Smith , Sally | 2/8/2017 | | Clear All Sorting |
| | Person, Test | 8/13/2016 | _ | Group By This Column |
| | mom, test | 8/26/2016 | | |
| | Kyle, Selena | 1/3/2017 | | Show Group By Box |
| | Kyle, Selena | 2/8/2017 | | Hide This Column |
| | Kyle, Sarah | 1/3/2017 | ē | Column Chooser |
| > | Kyle, Sarah | 2/8/2017 | | Best Fit |
| | Ho, Tally | 8/11/2016 | | Best Fit (all columns) |
| | Ho, Len | 8/11/2016 | | |
| | Doe, janna | 8/1/2016 | V | Filter Editor |
| | Billy | 8/24/2016 | | Show Find Panel |
| | | 8/19/2016 | | Show Auto Filter Row |

 Now that the Group By Box is visible, drag and drop the heading column into the group by box area

| (| Client olympheader here to group by that column | | | | | | | | | | |
|---|---|------------------|----------------|--------|-------------------|--------------------------------|--|--|--|--|--|
| | VClient 🛛 🔍 🤋 | Admission Date 🔺 | Discharge Date | Funder | Туре | Referral Source | | | | | |
| | Test, Client | 7/1/2016 | | | Emergency Shelter | | | | | | |
| | Tall, Walking | 2/1/2017 | | | Lodging & Homel | | | | | | |
| | Smith, Sophia | 2/8/2017 | 3/17/2017 | | Emergency Shelter | Sexual Assault Agency/Advocate | | | | | |
| | Smith , Sally | 2/8/2017 | 3/17/2017 | | Emergency Shelter | Sexual Assault Agency/Advocate | | | | | |
| | Person, Test | 8/13/2016 | | | | | | | | | |
| | mom, test | 8/26/2016 | | | Emergency Shelter | | | | | | |

- Drag and drop various headers as needed. The Group by Box area will show a waterfall type display of groupings that are applied
- Right click on the Group By Box area and select Hide Group By Box. It is recommend to close the Group By Box once Sorting is complete

| (| Client | Admissio | n Date 🔺 Ty | /pe 🔺 | | | | |
|----------|-----------|---------------|---------------|----------|--------------|------|------------------------------|--------------------|
| | Discharge | Date | Funder | | Referral Sou | Irce | | Service Location A |
| > | 🛨 Client: | Test, Client | (Count=1) | | | | | |
| | 🛨 Client: | Tall, Walking | g (Count=1) | | | | | |
| | 🛨 Client: | Smith, Soph | ia (Count=1) | | | | | |
| | 🛨 Client: | Smith , Sally | (Count=1) | | | | | |
| | 🛨 Client: | Shelter, Chi | ld (Count=1) | | | | | |
| | 🛨 Client: | Shelter, Ad | ult (Count=1) | | | | | |
| a a | and | Client | Admissio | n Date 🔺 | Туре 🔺 | | Full Expand Full Collapse | |
| ווו ס | - | Discha | rge Date | Funder | | ex | Clear Grouping | |

-

Hide Group By Box

6. The list view will now show the desired grouping

| - | | | | | | | | |
|---|-----------------------------------|---------------------------|--------------------------------|------------------|--|-----------------------|------------------------|--------------------------------------|
| Г | Discharge Date | Funder | Referral Source | Service Location | Housing Status At Admission | Destination (at Exit) | Reason For Termination | Head of Household |
| Г | Client: Test, Clien | t (Count=1) | | | | | | |
| Г | Admission Dat | e: 7/1/2016 (Count=1) | | | | | | |
| Г | Type: Emr | ergency Shelter (Count=1) | | | | | | |
| | 🛨 Client: Tall, Walkir | ig (Count=1) | | | | | | |
| Г | 🖃 Client: Smith, Sop | hia (Count=1) | | | | | | |
| | Admission Dat | e: 2/8/2017 (Count=1) | | | | | | |
| > | Type: Em | ergency Shelter (Count=1) | | | | | | |
| Г | 3/17/2 | | Sexual Assault Agency/Advocate | | Category 4 - Fleeing domestic violence | | | Smith , Sally - 2/8/2017 10:39:03 AM |

+ Client: Tall, Walking (Count=1)

+ Client: Smith, Sophia (Count=1)





Ungroup specific field

- 1. Show Group By Box
- 2. Right click on a grouping field and Select UnGroup



Clear Grouping(s)

- 1. Right click inside the Group by Box area and click Clear Grouping
- 2. Right click inside the Group by Box area and click Hide Group by box to exit grouping

| Client Type Admission Date | | |
|-----------------------------------|---|-------------------|
| Distance Data | | Full Expand |
| Discharge Date Funder Refer | | Full Collapse |
| Type: Emergency Shelter (Count=1) | 암 | Clear Grouping |
| Client: Tall, Walking (Count=1) | | Hide Group By Box |
| I I make a second a second second | _ | |





Backup a SQL Database to a file

- Open Start Menu > Microsoft SQL Server 2008 R2 > SQL Server er Management Studio
- Connect to the appropriate instance of the Microsoft SQL Server Database Engine, in Object Explorer; click the server name to expand the server tree.
- 3. Connect to the Server

Note: You may need to select Authentication: SQL Server Authentication and then Enter your username and password (This was created when you installed SQL Server. It may be User name: SA and password: osniumws)

- 4. Expand Databases
- 5. Right Click on the database to backup, Tasks > Back Up...





Remove any existing backups path (as they are not needed or would "double" backup if using the same one over and over)

 (before)
 (after)

7. Select the Disk option and then Click Add (to create a database *.bak file in a specific location)

| . | I | | Ba | ack Up Databa | se - WS | | | × |
|----------------|--------------------|--------------|-----------------|--------------------|---------------|--------------|---------|--------------|
| - | Select a page | | 📓 Script 💌 🚺 H | lelp | | | | |
| - | Poptions | | Source | | | | | |
| | | | Database: | | | WS | | ~ |
| | | | Recovery mode | el: | | SIMPLE | | |
| | | | Backup type: | | | Full | | ~ |
| | | | Copy-oni | v Backup | | | | |
| | | | Backup compo | nent: | | | | |
| | | | Databas | e | | | | |
| | | | Files and | filearoups: | | | | |
| | | | Backup set | | | | | |
| | | | Name: | | WS-Full Datab | ase Backup | | |
| | | | Description: | | | | | |
| | | | Backup set will | expire: | | | | |
| | c | | After: | | 0 | ÷ | davs | |
| | Connection | | 0 On: | | 11/28/2012 | | ,- | |
| | dharding-pc\SQLExp | iress | Destination | | | | | |
| | Connection: | | Back up to: | ۲ | Dijsk | (|) Tage | |
| | OS\dharding | | c:\Program File | s\Microsoft SQL Se | erver\MSSQL10 | 50.SQLEXPRES | SVMSSQL | Add |
| | View connection | n properties | | | | | | |
| - | Progress | | | | | | | Remove |
| | Beady | | | | | | | Contrate |
| | | | ۲ | | | | > | Contents |
| | | | | | | | | |
| | | | | | | | ОК | Cancel |
| | | 0 | 00: | 11/28 | /2012 | | | |
| r: ing-nc\9 | OI Express | Destinatio | <u>o</u> n. | 11720 | 2012 | | | |
| ndion. | | Back | up to: | Disk | | OT | ape | |
| harding | | | | · · | | | | |
| /iew con | nection properties | | | | | | | A <u>d</u> d |
| | | | | | | | | - |
| BSS | | | | | | | | Kemove |
| Read | y | | | | | | | Contents |
| 2 | | | | | | | | Contenta |
| | | | | | | | | |
| | | | | | | | | Connel |
| | | | | | | C | /K | Cancel |
| | | | | | | | | |





8. Selecting a **Backup Destination**, click the ... at the end of File Name, then provide the file name of the backup that is being created.

Osnium would suggest to prefix the software name (ie: WS) then an underscore (ie: _) followed by a standard date format (ie: 20150107), and lastly .bak

Example File Name: WS_20160107.bak

| Ū | Select Backup Destination | × |
|------------|--|-----|
| Sel bac | ect the file or backup device for the backup destination. You can create kup devices for frequently used files. | |
| De | stinations on disk | _ |
| | <u>Fi</u> le name: | - 1 |
| | >soft SQL Server\MSSQL10_50.SQLEXPRESS\MSSQL\Backup\ | - 1 |
| | Backup device: | - 1 |
| | × | - 1 |
| | OK Cancel | ı İ |
| _ | | : |

Note, default backup folder depends on the version of Windows and SQL Server, however a typical folder path is as follows:

C:\Program Files\Microsoft SQL Server\MSSQL10_50.SQLEXPRESS\MSSQL\Backup

9. Final step is to verify or transfer the file to another media type other than the Server's hard drive. Osnium would suggest copying the *.bak file to another PC or USB Key with sufficient space in case of any major disaster at the location of the server.

Note, keep in mind that the database backup may contain confidential information and should not be shared over the internet without secure password or transfer of the file.

Restoring a database file to SQL Server

- 1. Close all connections to the database about to be restored
- Open Start Menu > Microsoft SQL Server 2008 R2 > SQL Server Management Studio
- 3. Connect to the appropriate instance of the Microsoft SQL Server Database Engine, in Object Explorer; click the server name to expand the server tree.



4. Connect to the Server

Note: You may need to select Authentication: SQL Server Authentication and the Enter your username and password (This was created when you installed SQL Server. It may be User name: SA and password: osniumws)

5. Expand Databases





- 6. Right-click the database (if already exists), Tasks> Restore > Database...
- <u>File Edit View Debug Tools Window Community H</u>elp <u>0</u> New Query | 🔓 | 🔓 | 🗃 🗐 🗸 👼 Object Explorer Connect 🕶 📑 📑 🛒 🔳 🏹 🛃 - 6 😑 🚞 Databases 🗄 间 WS 🔒 New Database... 🗉 🚞 Security New Query 🗄 🚞 Server Ot Script Database as 🕀 🧰 Replicatio • 🗄 🧰 Manager Tasks • Detach... Policies Take Offline Facets Bring Online Start PowerShell Shrink ۲ Reports Back Up Restore ۲ Database... Rename Files and Filegroups.. Delete Generate Scripts.. Transaction Log.. Extract Data-tier Application... Refresh Register as Data-tier Application... Properties Import Data... Export Data...
- On the General page, select From device: Click the browse button (ie ...)



8. Now the Specify Backup dialog box is visible. Click Add

| - | Specify Backup | × |
|-----------------------------|-------------------------------------|----------------|
| Specify the backup media ar | nd its location for your restore op | peration. |
| Backup media: | File | * |
| Backup location: | | |
| | | Add |
| | | <u>H</u> emove |
| | | Contents |
| | | |
| | | |
| | | |
| | | |
| | <u>0</u> K | Cancel Help |





Quick Start Guide

9. After you add the downloaded database to the list (extract if needed), click OK to return to the General page

After selecting screen should look similar to below screen shot, if so, click Ok:

| - | Specify Backup | × |
|------------------------------------|-------------------------------------|----|
| Specify the backup media and its l | ocation for your restore operation. | |
| <u>B</u> ackup media: | File 🗸 | |
| Backup location: | | |
| C:\Program Files\Microsoft SQL Se | erver\MSSQL10_50.SQLEXPRESS\MSSQL\ | |
| | Remov | e |
| | Conten | ts |
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| | OK Cancel Help | |

| Select the file: | | | | | |
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| Program Files | | | | | |
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| WS_B Database names removed for this guide | | | | | |
| WS_B | | | | | |
|] WS_R | | | | | |
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| | | ~ | | | |
| < | 60 | > | | | |
| Selected path: | C:\Program Files\Microsoft SQL Server\MSSQL10_50.SQLE | XPRE | | | |
| Files of type: | Backup Files(*.bak;*.tm) | ~ | | | |
| File name: | | | | | |
| | | | | | |

- 🔄 Script 👻 🚺 Help Destination for restore Select or type the na me of a new or existing data To database ws Most recent To a point in time Source for restor Specify the source and loc of backup sets to rea From database From device: C:\Program Files\Microsoft SQL Server\MSSQL10_5 Select the back W Coll Detail Server: dharding-pc\SQLExp Connection: OS\dharding 📑 <u>View o</u> Ready OK Cancel ore Data Select a page of the second se 🔄 Script 🔻 🚺 Help envrite the existing database (WITH REPLACE) serve the replication settings (WITH KEEP REPLICATION) Prompt before restoring each backup Restrict access to the restored database (WITH RESTRICTED_USER) Restore the database files as: Original File Name File Type Restore As Rows Data c:\Program Files\Microsoft SQL... Reports Database Reports Database log Log c:\Program Files\Microsoft SQL... verv state Leave the database ready to use by rolling back uncommitted transactions. Additional transaction logs cannot be restored.(RESTORE WITH RECOVERY) Leave the database non-operational, and do not roll back uncommitt transaction logs can be restored. (RESTORE WITH NORECOVERY) Server: dharding-pc\SQLExpress Leave the database in read-only mode. Undo uncommitted transactions, but save the O actions in a standby file so that recovery effects can be reversed. (RESTORE WITH STANDBY) Connection: OS\dharding I View conr Ready The Full-Text Upgrade Option server property controls whether full-text indexes are imported, rebuilt, or reset. ОК Cancel
- In the Select the backup sets to restore grid, select the backups to restore by the check box beside it (this should only be one). This grid displays the backups available for the specified location.
- 11. Click Options in the Select a page pane
- In the Restore options panel, you can choose any of the following options, if appropriate (for your situation and most other situations): Check Overwrite the existing database





| 1 | Restore Datab | ase - fdasdf | - 🗆 🗙 | | | | |
|---|--|--|---|--|--|--|--|
| Select a page | Restore Dutable Script Restore options Peserve the replication sett Prompt before restoring each Restore database files as: Original File Name Reports Database Reports Database Jog | ase (WITH REPLACE ings (WITH KEEP_RE h backup red database (WITH F File Type Rows Data Log | PLICATION) PESTRICTED_USER) Restore As c:\Program Files\Microsoft SQL c:\Program Files\Microsoft SQL | | | | |
| Connection | Recovery state Leave the database ready to use by rolling back uncommitted transactions. Additional transaction logs cannot be restored.(RESTORE WITH RECOVERY) Leave the database non-operational, and do not roll back uncommitted transactions. Additional | | | | | | |
| Server: dharding-pc\SQLExpress Connection: OS\dharding | transaction logs can be restored (RESTORE WITH NORECOVERY) Leave the database in read-only mode. Undo uncommitted transactions, but save the undo actions in a standby file so that recovery effects can be reversed (RESTORE WITH STANDBY) | | | | | | |
| Progress Executing (0%) Stop action now | Standby file: The Full-Text Upgrade O imported, rebuilt, or reset. | Standby file: The Full-Text Upgrade Option server property control imported, rebuilt, or reset. | | | | | |
| | | | OK Cancel | | | | |

13. Once Ok is clicked the Restore of the database will begin (ie: 0 to 100%)

14. Successful Restore of a database



15. Test for successful login to software to complete, using the Administrator login.



Running Reports Types of Reports

Display Reports

Display Reports display data related to various object records in the database and are useful for printing out Client/ Child/Abuser details. Each of the Client/Child/Abuser tabs can be printed using the display report.

Generic Reports

Generic Reports display data related to various administrative tasks, as well as data not directly associated with a specific database object. For example, the Service Report can gather all the details of the Services during a given date range, then it can be filtered by the various parameters in the report.

Funder Reports

Funder Reports display data in a format similar to the state or federal Funder reports.

Importing a Report

- 1. Navigate to the reports section by click on the navigation button > Reports
- 2. Then click on the "Import / Export Reports" button and select the "Import Report" option.

| 1 | A Carlo Generic Reports | | | | | | | |
|---|---|---|-----------------------------|---------------|--------|--|--------------|--|
| | 📋 🗋 New 👻 🗙 🚖 Toggle Favorite Report 📝 Edit | | 📋 Import / Export Reports 🔹 | | orts 🔻 | 🔯 Copy Report Update Query Definitions 🛛 📑 🚺 | C Refresh | |
| | | Report Name | B | Import Report | | | Version Date | |
| | | Report Category: Display Reports (Count=20) | | Export Report | | | | |
| | | Administrative Time Display | _ | | | | 12/5/2016 | |
| | | Alleged Abuser Display | | | | | 12/5/2016 | |

3. Locate the reports that you wish to import and select them. If you're importing one report, you can click on it then hit the "Open" button. If you're importing multiple reports, you can press and hold the left mouse button to select multiple reports, then hit the "Open" button.

Please Note: only *.repx files can be imported

When the reports have been imported, you will see a verification window.



 $\Delta \Delta$

Dashboard

information

staff membe

People

abusers Hotline Call

Overview of Clients and Program

A listing of all clients/children/alleged

A listing of all calls that have been recieved at the shelter Scheduler

A schedule view of all appointments by



Generating/Running a Report

To generate a report, double click on the desired report OR right-click on the report that you wish to run, and click execute report.

| • Report Category: Display Reports (Count=20) • Report Category: Generic Reports (Count=18) • Active Stays Report • Administrative Time Report | ate Program/Stay ate Administrative Tim |
|--|--|
| Report Category: Generic Reports (Count = 18) Double Click Active Stays Report 12/5/2016 Default Up to dat 12/5/2016 Default Up to dat 12/5/2016 Default Up to dat | ate Program/Stay ate Administrative Tim |
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| Administrative Time Report 12/5/2016 Default Up to dat | ate Administrative Tin |
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| Call Report 12/5/2016 Default Up to da | ate Hotline Call |
| Clinical Note Report 12/5/2016 Default Up to dat | te Progress Notes |
| Financial Assistance Report 12/5/2016 Default Up to dat | te Financial Assistan |
| Household Report 12/5/2016 Default Up to day | te Program/Stay |
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| Report Hame | Туре |
| Report Category: Display Reports (Count=20) | |
| Report Category: Generic Reports (Count=18) | |
| Active Stays Report 12/5/2016 Default Up to date Progr | ram/Stay |
| Administrative Time Report 12/5/2016 Default Up to date Admin | nistrative Time |
| Call Report 12/5/2016 Default Up to date Hotlin | ne Call |
| Clinical Note Report | ress Notes |
| Finandal Assistan 📋 Import / Export Reports 🔸 12/5/2016 Default Up to date Finance | ncial Assistance P |
| Household Report 👔 Copy Report Up to date Progra | ram/Stay |
| Non Working Time Update Query Definitions 12/5/2016 Default Up to date Non V | Working Time |
| Outreach Report 2/5/2016 Default Up to date Outre | each |
| Protection Order Togale Favorite Report 12/5/2016 Default Up to date Protection | ection Order |
| Referral Report 12/5/2016 Default Up to date Refer | rral |
| Services Report 12/5/2016 Default Up to date Client | t Service |
| Stays Report Create Version 12/s/2016 Default Up to date Progr. | ram/Stay |
| Show Report Designer 12/2/2/16 Default Up to date Progr | ram/Stav |
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| Training Benerit Li to date all the to date Training Ctri-Shift+O | -7 |

Filtering Reports

Use the drop-downs to select a start and end date for the report.

Use the drop-downs to adjust the filters in the Parameters section to highlight the information desired. The filters available will vary depending on the type of report being accessed.

Click **Submit** to run the report with the selected filters.

Click Reset to clear the applied filters.

After running the report, icons in the ribbon will be active. Options include saving the report, printing, adjusting the report view, exporting to a different file format, emailing the report and closing the report.

Exporting Reports

To Export the report to a different file format, select the and choose the format to export the report to (PDF, HTML, MHT, RTF, XLS, XLSX, CSV, Text, Image).

Select OK on the Export Options window.

Give the report a name and choose a file location.

Click Save.







Using the Email Report Function

After running a report, click the email icon



. This will take you through the steps of saving the report as a PDF.

After naming the report and choosing a file location, click Save.

This will open Microsoft Outlook with the report attached to an outgoing email.

Adding a Watermark

Including a watermark is a useful way to indicate the status of a report (ie. draft, final) or instructions on use, confidentiality and ownership. Watermark

To add a watermark after running a report, click

watermark icon to open the Waterthe mark options window.

For a text watermark: complete the form choosing the text, direction, transparency, font, color, size position and page location.

For an image watermark: click on the Picture Watermark tab in the Watermark options window. Click browse to find and select the image. Adjust size, alignment, transparency, position and page range.

> The image on the left will preview the watermark with the selected options.

Click OK to apply the watermark to the report.

Thumbnails

to show thumbnails of pages in the report. Click the Thumbnails icon

Saving Reports

Click on the Save icon to save the report. Users will be promoted to choose a location to save the file.

Printing Reports

Click the printer icon to print the report directly from os-soft.



Page Setup

to access options for adjusting the report's layout (paper size, orientation, mar-Click the Page Setup icon gins).

