

## **Instructions**

## Setting up Users with Upgrade Permissions

Osnium will push out releases to you as they become available. In order to install the upgrade, at least one user requires Upgrade Permissions. Once an upgrade is completed by that user, automatic upgrades will occur for all other users that login, regardless of their permissions.

Please follow the instructions below to set Upgrade Permissions for your users/staff.



1. Select Other > Staff List from the Navigation Menu

2. Double click on the Staff to open their profile

	b Staff List 🛛 🗙				
	Is Active	First Name	Last Name	User Name	Staff Paper ID
	> 🔽	Administrator		Administrator	
		Derek	Harding	dharding	
	<b>X</b>	Staff	Limited	SLimited	
		Staff	ReadOnly	SReadOnly	
	<b>X</b>			Tharding	
	<b>V</b>	Wendy	Smith	wsmith	
-1					



3. Right click and select Customize Layout

Ċ	Staff List	le Administrator - Staff 🔹 💌		
	☆ Staff			
	Last Name:			Show In Scheduler
	First Name:	Administrator		Allow Edit Own Schedule Only
	User Name:	Administrator		Volunteer
	Program Type:	X •		Is Active
	Full Name:	Administrator	Staff Paper ID:	
		Customize Layout		Change Password On First Logon Account Locked
		G Reset Layout		

4. In the customization window, select Update Permissions and drag and drop it onto the

	Customization
New •     Save     Save and Save and New Close     Delete     Validate     Change My Password     Reset     Cancel     Open Item     Shelter Stats       Records Creation     Save     Edit     Open Related Record     Open Related Reco	View M
🍪 Staff List 🕹 Administrator - Staff 🛛 🗙	Hidden Items Layout Tree View
★ Staff	Enter text to search P
	Empty Space Item
Last Name:	A Label
First Name: Administrator	Separator
Dise Marines Administrator	↓ Splitter
Full Name: Administrator	Account Locked Date Time:
	⊖ Address:
	Allow Remote Connections:
	Dont Save Model On Exit:
	⊖ Last Logoff:
🛞 Activity Session Type Category 🛕 Incidents  (1) Roles 🖂 Legal Service 🕺 (4) Generic Person 💽 🔍 Stay	Password Set Date:
Add & Remove & Filter Al Items	Phone Numbers:
	Sort Order:
raine	Organizate Permissions:
	Add
	Remove

Staff List	land Administrator - Staff 🛛 🗙
<b>☆</b> Staff	
	X ·

5. Exit the Customization Window



6. From the Drop Down, select Allow check and install

☆ Staff		
Last Name:		
First Name:	Administrator	
User Name:	Administrator	
Program Type:	X •	
Full Name:	Administrator	Staf
Update Permissions:	Allow check and install	
	None	
	Allow check and install	

- 7. Save and Close
- 8. This user can now complete the upgrade.

**Note:** You can set the initial field for the Update Permission field as "None" to ensure any new users do not have permission to complete the upgrade.

## **Automatic Update Feature**

Users with the appropriate privileges will see an upgrade tab in the ribbon after closing and re-opening the software. Please select the upgrade tab and perform the software upgrade.

Before upgrading, please ensure the following:

- All users have closed the software prior to performing the update
- A backup is performed of the database by either using the button in the software upgrade, using the Local Backup button, or having IT do a manual backup
- You have enough time to complete the upgrade
- 1. Upon logging into WS you will see Software Updates in orange in the Ribbon.

@ C @ (	•			Software	Updates			
н	ome	View	Tools	Update	s			
	X			7	C	Ê	×	<b>•</b>
New •	Delete	Ope	n Item	Shelter Stats	Refresh	Show Report	Close	Previous Next Person Person
<b>Records Creation</b>	Edit	Open Rela	ated Record		View	1	Close	Records Navigation



2. Select the Updates tab

@ C @ (		Software	Upda	ates				
Ш▼ Н	ome	View	Tools		Updates	s		
	X		Ę		7	C		Ê
New •	Delete	Oj	pen Item		Shelter Stats	Refr	esh	Show Report
Records Creation	Edit	Open R	elated Recor	d			View	

3. Select Upgrade Available

@ (C	9 🕤 🤇	•			Software Up	dates
	Но	me	View	Tools	Updates	
Upda Availa Upgrade A	ate able					

4. Click Perform Backup





5. Upon Backup completion the checkbox "I have performed a backup" will check

x
Update What's New
BACKUP REQUIRED Your software is about to be upgraded. We perform testing on all upgrades before they are released to you however there is a risk, as with any computer software upgrade, of data loss. For this reason we require you to perform a backup before the upgrade is installed.
Perform Backup
☑ I have performed a backup
Download & Install Update
Cancel

6. Select Download & Install Update

	x
Update	What's New
Your softwork on all upg there is a data log	BACKUP REQUIRED ware is about to be upgraded. We perform testing grades before they are released to you however risk, as with any computer software upgrade, of ss. For this reason we require you to perform a backup before the upgrade is installed.
	Perform Backup
	I have performed a backup
	Download & Install Update
	Cancel

7. The download will occur, this could take a few minutes.





8. The WS Setup Wizard will open, click Next



 Select whether the Install is for Everyone, or for Just Me and click Next Selecting Everyone will allow any User logging into this physical PC to run WS. Selecting Just Me will only install WS for the User currently logged into Windows.



il -	WS		-	□ ×						
Select Installation Folder										
The installer will install WS to the following f	The installer will install WS to the following folder.									
To install in this folder, click "Next". To inst	all to a different folder,	enter it belo	w or click "	Browse''.						
Eolder: C:\Program Files (x86)\Osnium Software	Inc\WS\		Brow	ISE						
			Disk (	Cost						
Install WS for yourself, or for anyone who	uses this computer:									
Everyone										
◯ Just me										
	Cancel	< Back		Next >						

10. Click **Next** to start the Installation

ø	WS	×
Confirm Inst	allation	5
The installer is ready	to install WS on your computer.	
Click "Next" to start t	he installation.	
	Cancel	< Back Next >

11. Click Close to complete the installation



₿	WS	-	□ ×
Installation Complete			
WS has been successfully installed.			
Click "Close" to exit.			
Please use Windows Update to check for any critical updates to the .NET Framework.			
	Cancel < E	Back	Close