os-soft

Quick Start Guide

OSNIUM SOFTWARE

Contents

Navigating WS

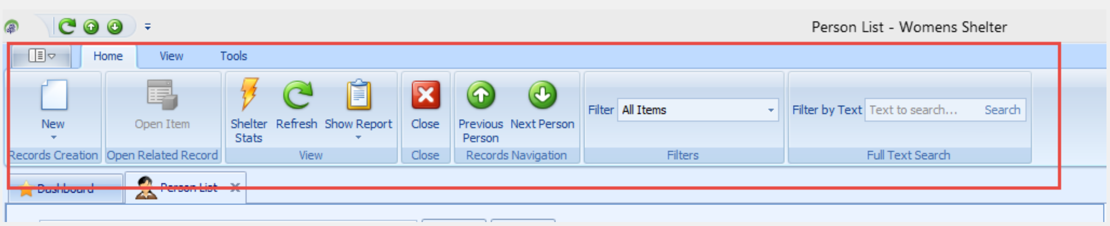
Navigating through WS can be done using the **Navigation Button** located in the top left corner of the main window. Clicking on this button will show a navigation menu with multiple Navigation Items.

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

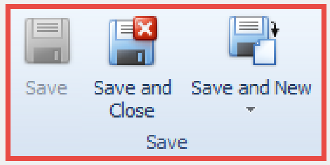
The Ribbon is located at the top of the WS Software. The Ribbon contains the commands and tools that you need to work in WS.



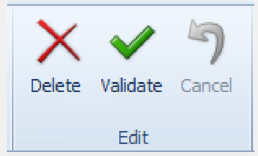
Home

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.

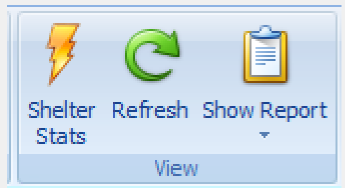


SAVE: Save has three options, **Save**, **Save and Close, and Save and New**. All options save your current work. **Save**, saves your work and keeps the current window open. **Save and close** will save your work and then close the current window. **Save and New** will save your current work, close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

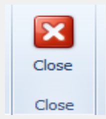


Edit: In the Edit section you will find three options, **Delete, Cancel,** and **Validate**. **Delete** will **erase** the record from the application. **Cancel** will **remove any changes** you made in the fields (cancel will not work when you delete records by mistake). **Validate** is used to ensure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

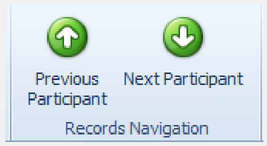
Open Related Record: **Open Item** is used to open a drop down value. Once open, you can then edit the drop down.



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)

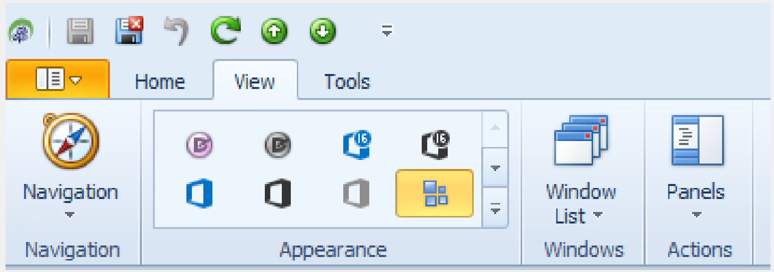
Filters and **Full Text Search**: These areas are discussed in greater details in the section **Filtering in a List View**

View

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

Changing the Theme of the Software

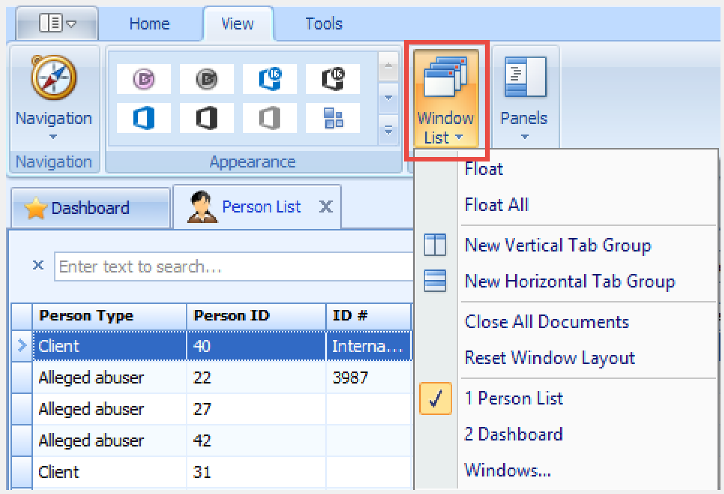
1. Select a Theme from the various options listed under appearance



Window List

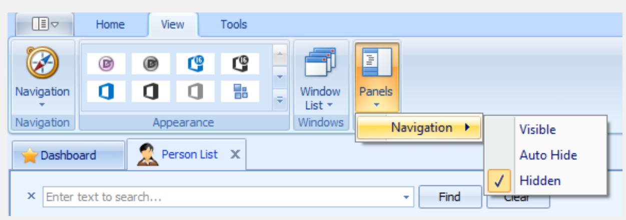
Window List is used to navigate through the software. A list of open windows can be seen at the bottom of the list. Select a window to navigate to it.

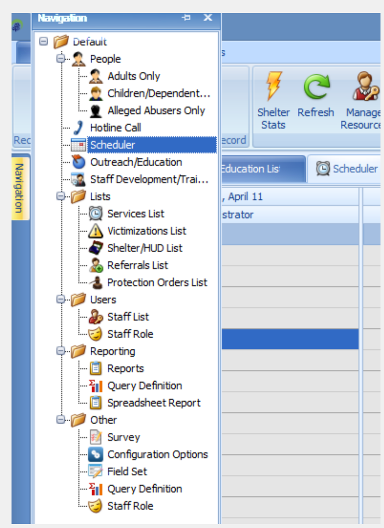
Window list allows you to create new vertical and horizontal tabs, as well as float current tabs.



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.





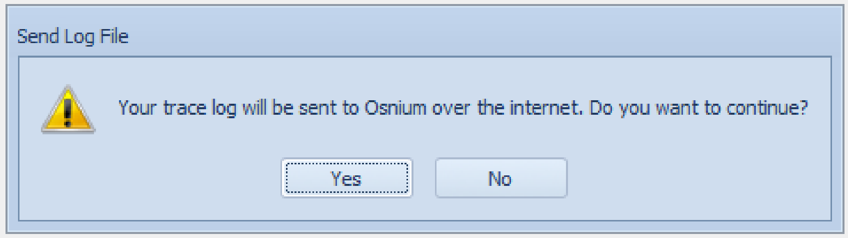
Tools

Send and Show Log File

Send Log File

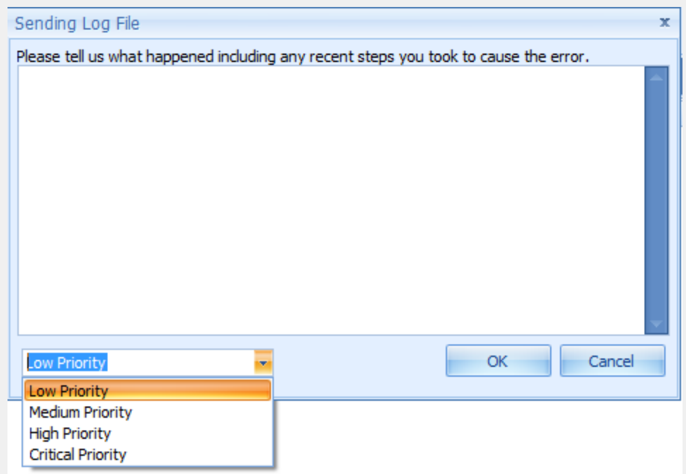
Send log File is used to send your log file to Osnium's technical support team. If an error occurs, it is used to diagnose what occurred in the system before the error occurred.

1. Click Send Log File
2. Select Yes



3. Include as much detail as possible regarding the steps leading up to the error.

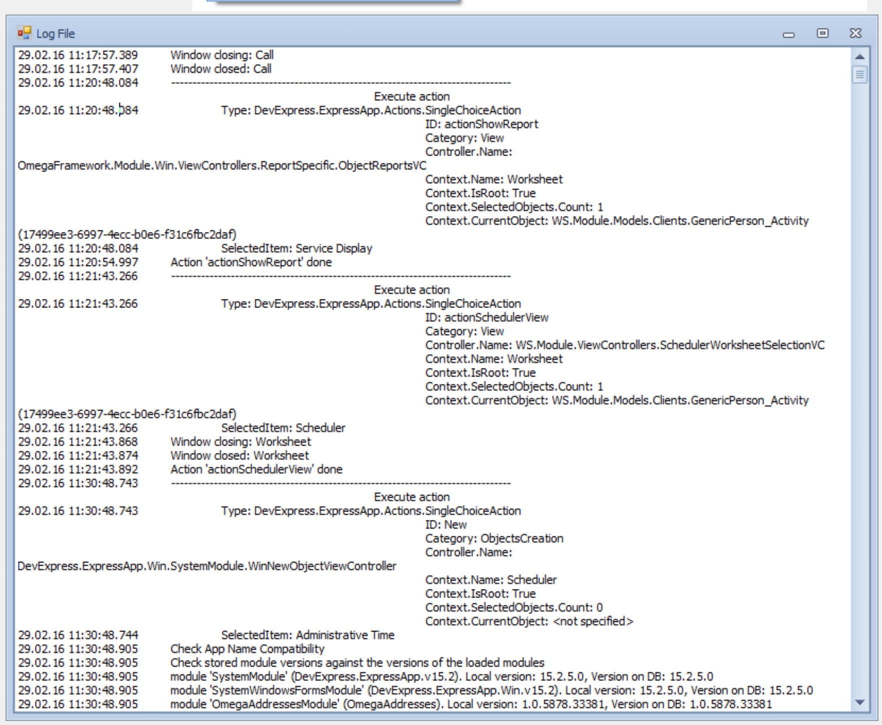
4. Finally, use the dropdown to select the priority level of the issue. For example:
    a. Low – happened once, did not impact the functionality of WS
    b. Medium – occurs infrequently, and can continue to work around the error
    c. High – frequently occurs, causes loss of work or impairs ability 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



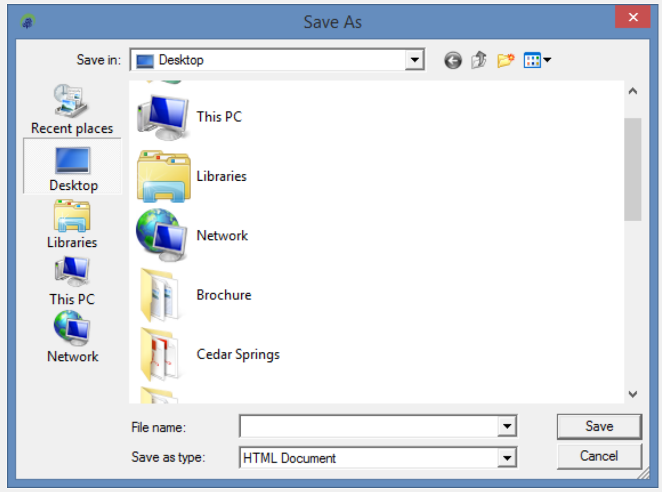
Save Customization Summary

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

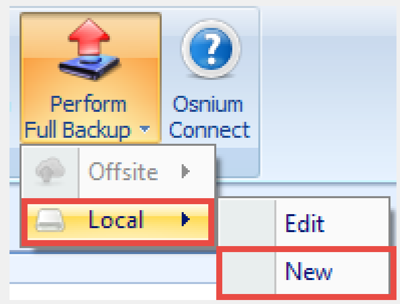
Note: It may take a few minutes for the file to save.



Perform Full Backup

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

Creating a New Backup

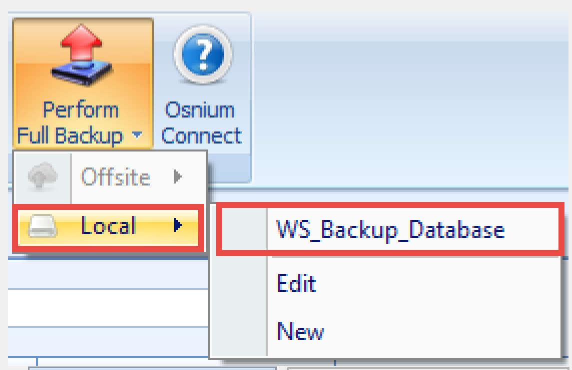


1. Click Perform Full Backup, select Local > New

2. Name the backup file (For Example: WS_Backup_Database)

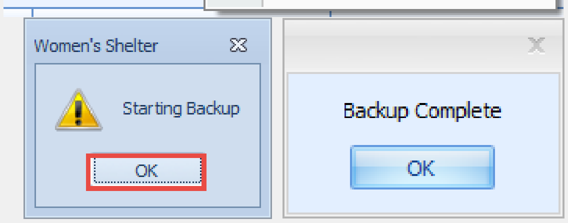
3. Choose a location for the backup (For example: C:\Backups)

Performing the Backup



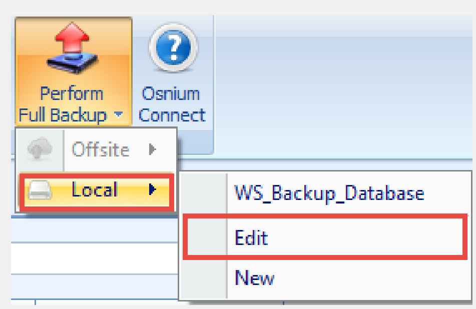
1. Click Perform Full Backup, select Local, and click the desired backup

2. Click OK



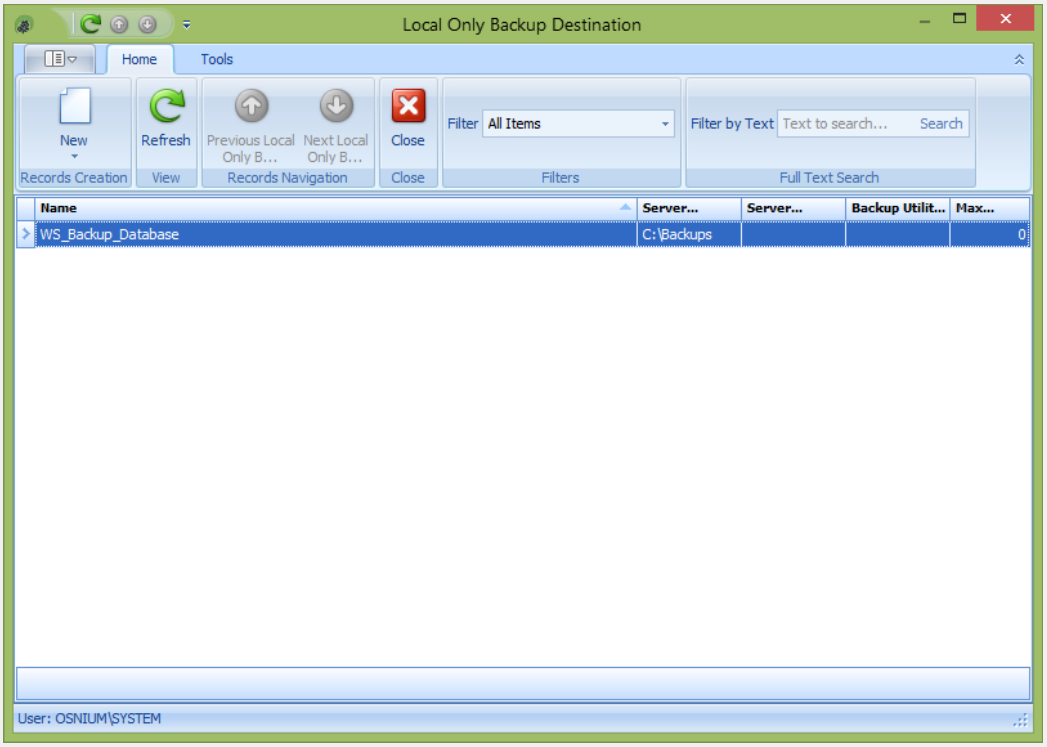
3. WS will notify you when the backup is complete. The backup file can now be found in the desired location.

Edit/Delete Backup Location

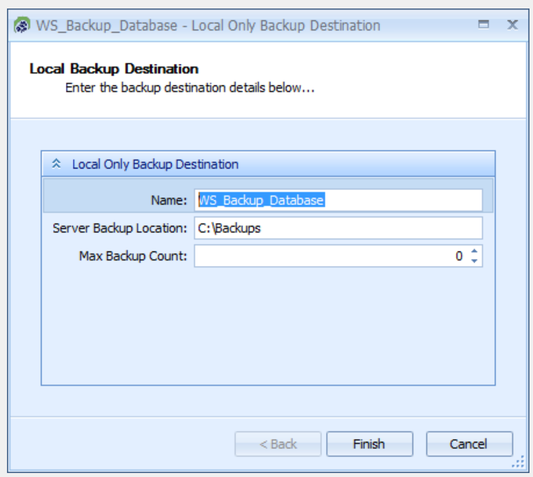


1. Click Perform Full Backup, select Edit

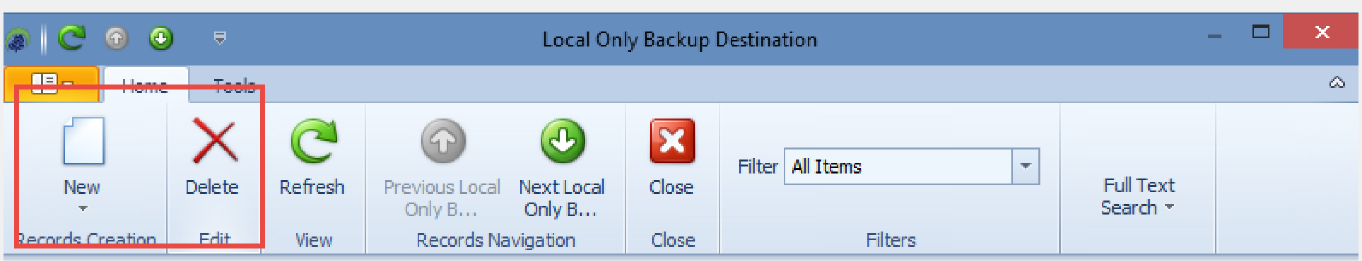
2. The window below will open



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



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



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

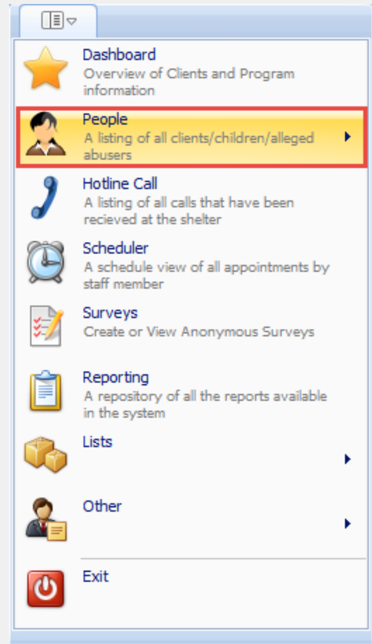
This is used by Osnium Staff members to determine what fields were originally named. This is not generally used by Clients.

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.

People

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



List Views

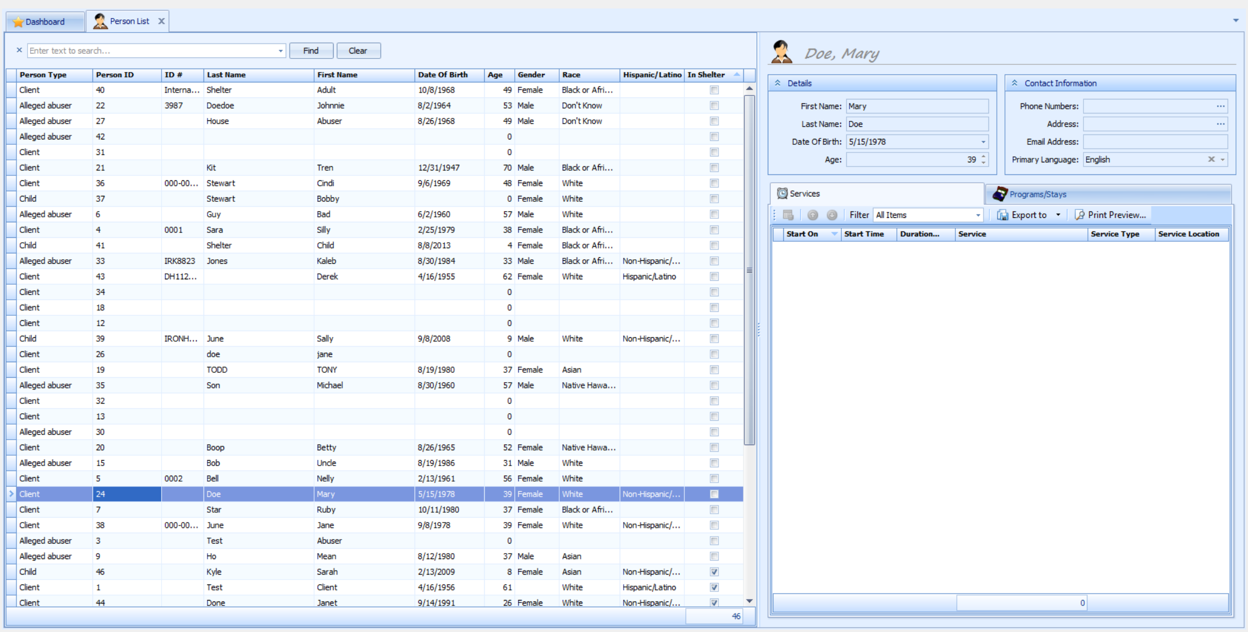
People List View

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.

2. 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.



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:

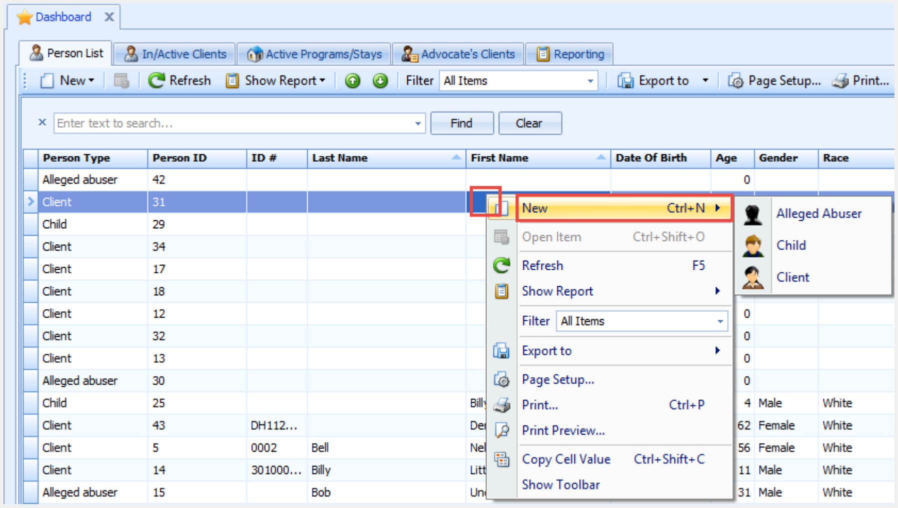
1. Click New from the Dashboard Ribbon

2. Select Client, Child or Alleged Abuser as desired.

Option 2:

1. Right click on the list on the left half of the screen

2. Hover over New and select Client, Child or Alleged Abuser as desired

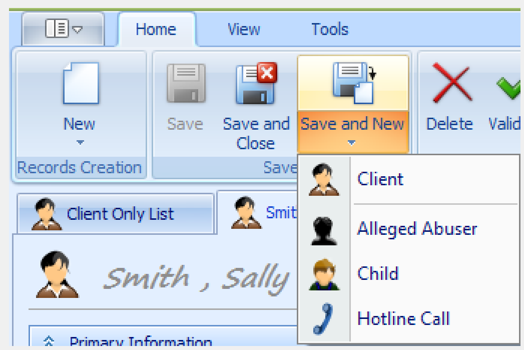


Creating a Client/Child/Abuser/Hotline Call from a person detail view

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

Option 1:

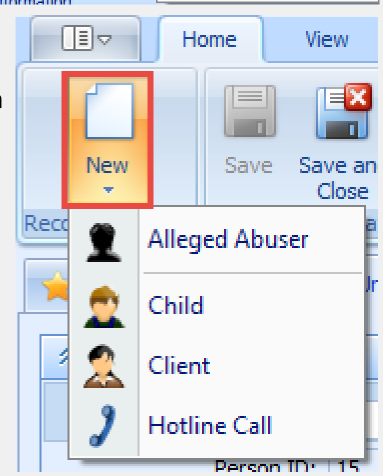
1. From a client/child/abuser/hotline call detail view select Save and New from the Ribbon



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

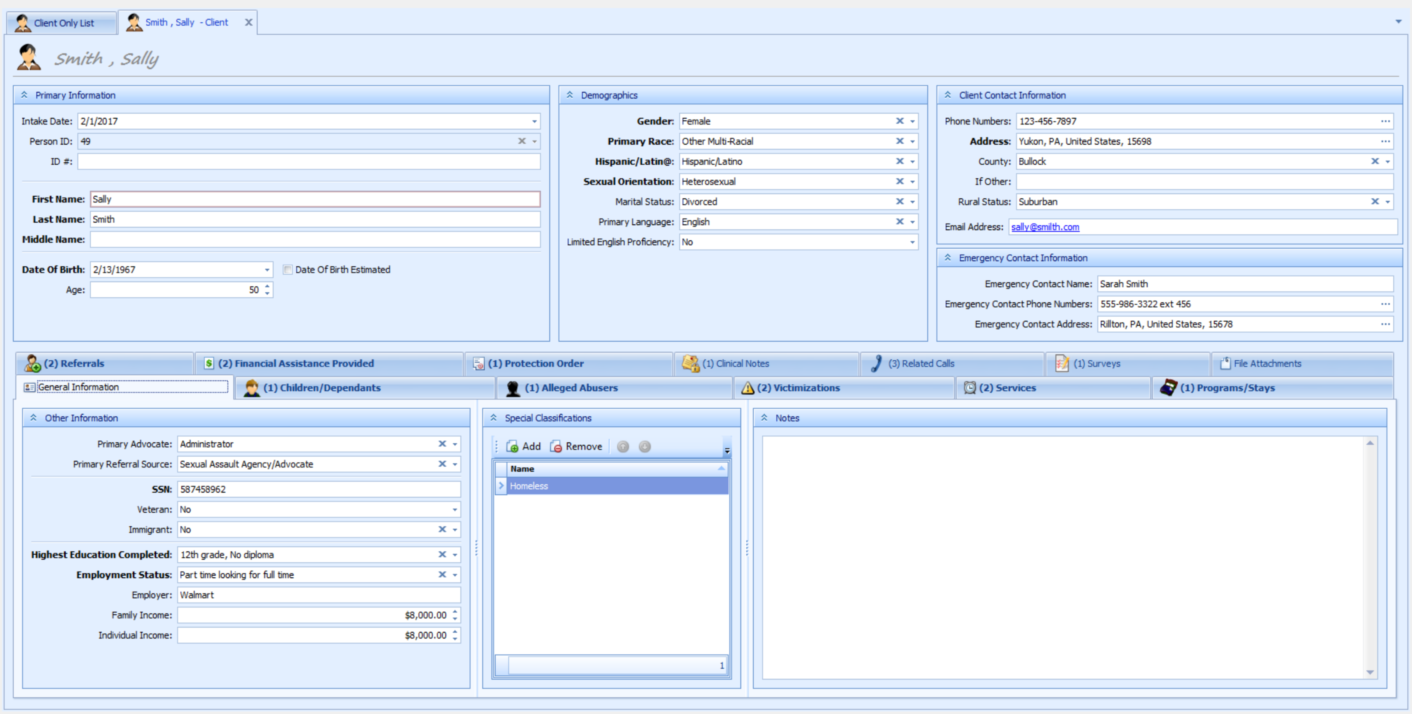
Double click on a Client from the list to see a detail view.

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.

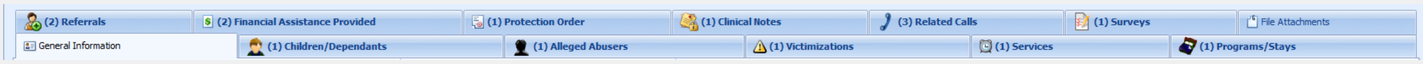
Please note instructions for the following fields:

- **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
  - The selected Primary number will appear on the client profile
- **Address**
  - Select … to open the address fields
  - Inputting the zip code will auto-populate the city, province and country



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:

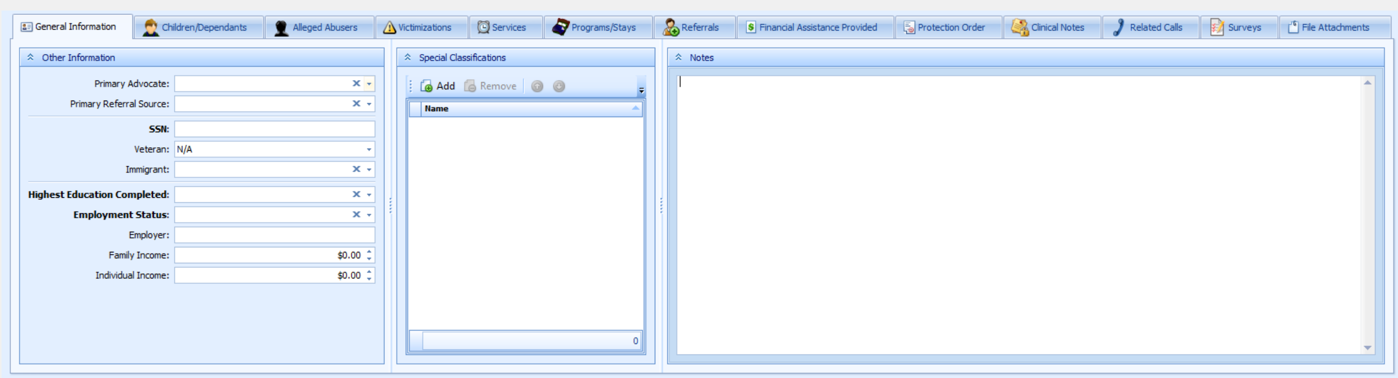


- General/Employment/Income Information
- Children/Dependents
- Alleged Abuser
- Victimizations
- Services
- Programs/Stays
- Referrals
- Financial Assistant Provided
- Protection Order
- Clinical Notes
- Related Calls
- Surveys
- File Attachments

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)



Children/Dependents

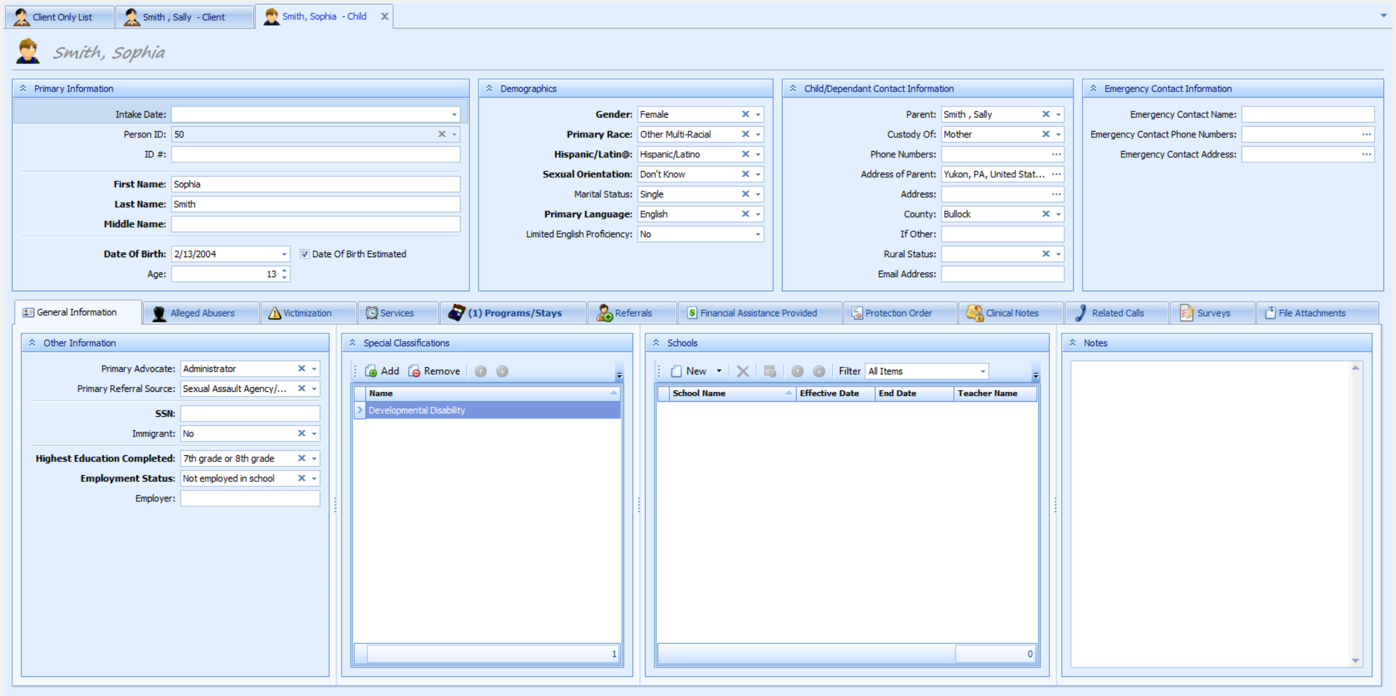
The Children/Dependents tab contains a list of all children/dependents associated with the client.

Linking the Children/Dependents

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

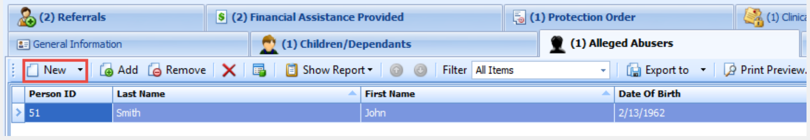


Note: This linkage works both ways. You can add a Parent to the Child's profile by selecting a client from the drop down list and the Child will populate onto the Parent's profile.

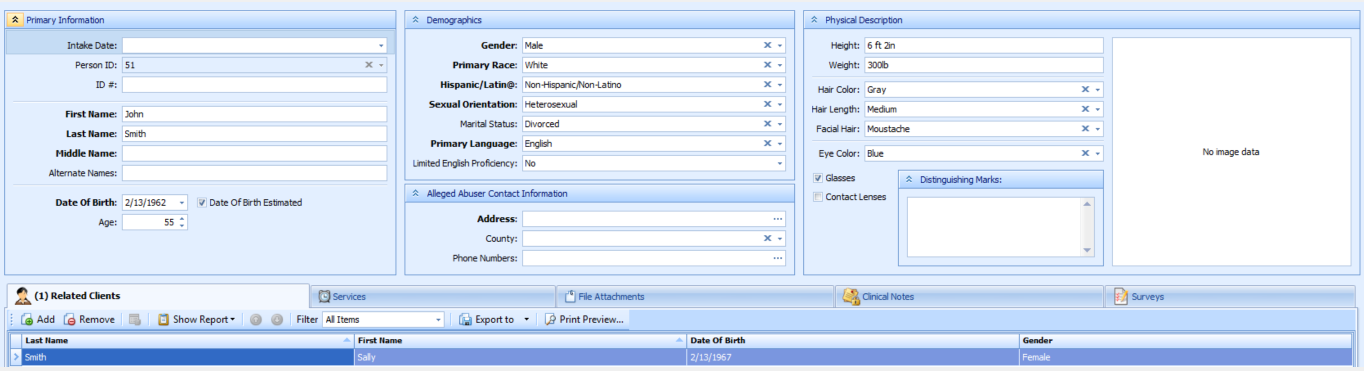
Alleged Abuser Link

Creating a New Alleged Abuser

1. Select New in the Alleged Abuser Link tab



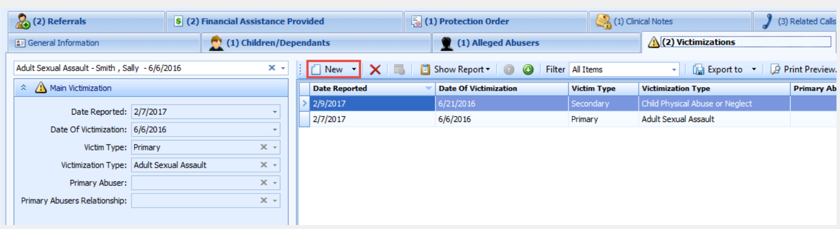
2. Fill in the details related to the abuser



Victimizations Link

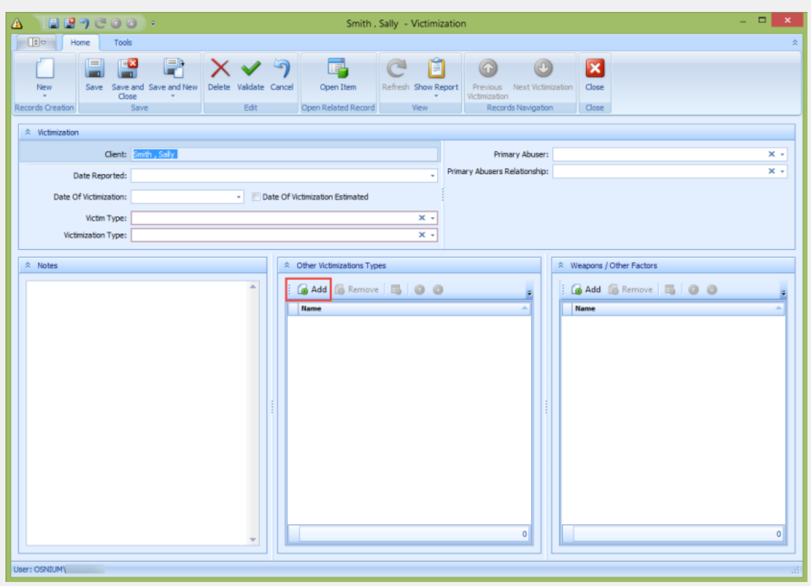
Creating a New Victimization for more detailed information see Victimizations – Create a New Victimization

3. Select New in the Victimizations Link tab



4. Fill in the details related to the victimization

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

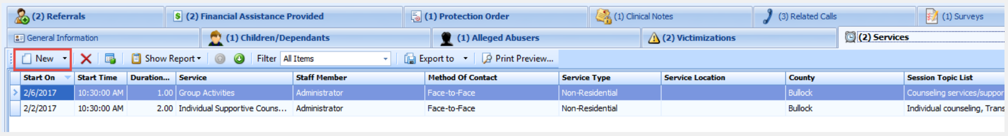
Note: hold CTRL down to add more than one

Services

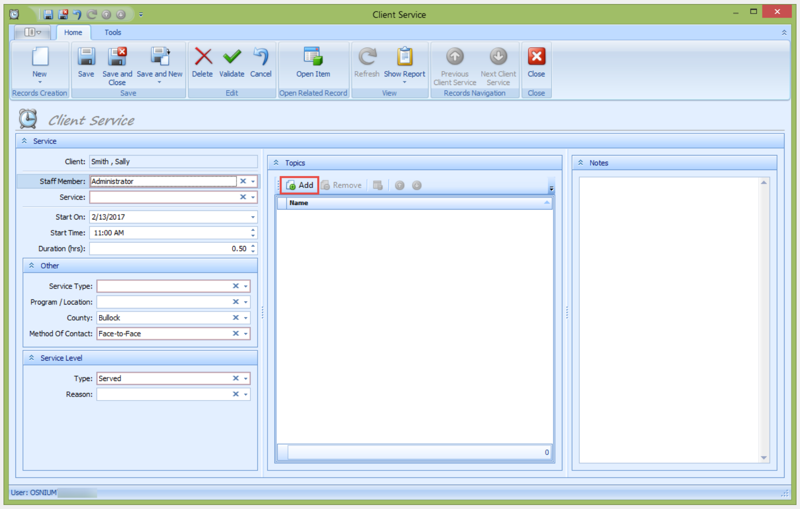
The **Services** section contains a list of services related to the Client. Double click on a service to view a detailed view of the record. For more detailed information please see Service - Creating a New Service Record

To create **New Service**

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



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

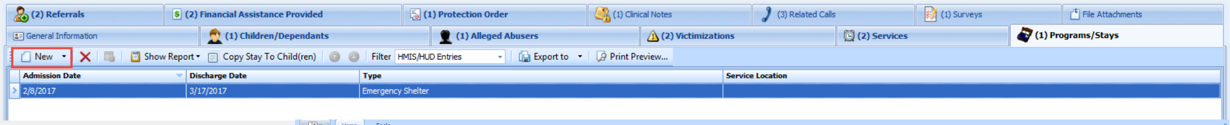


Program/Stays

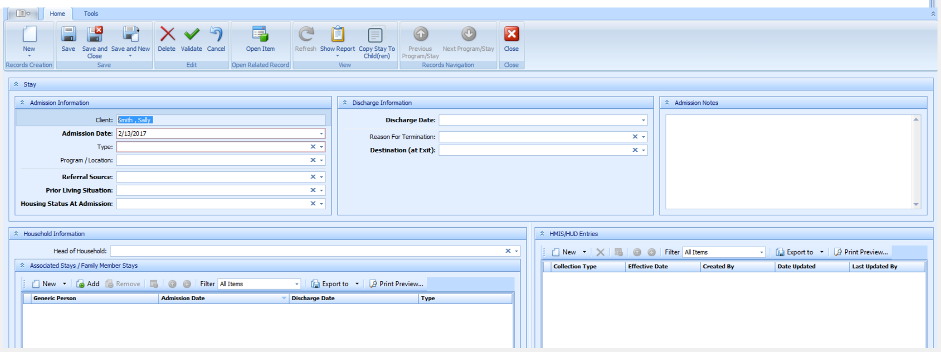
The **Programs/Stays** section contains a list of stays related to the Client. Double click on a stay to view a detailed view of the record. For more detailed information as well as information relating to HUD please see Shelter Stays - Creating a New Stay Record

To create **New Stay**

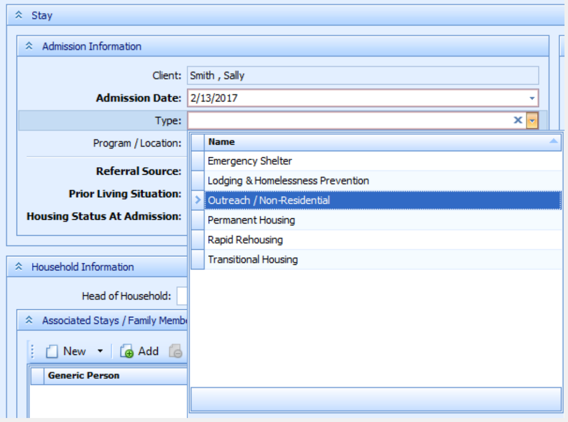
1. Click the **New** button in the upper left hand corner of the Shelter section in the Program/Stays Tab



2. Select the type of stay, from here you can also add children if they stay with the parent



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

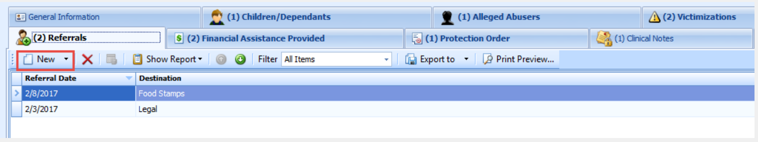


1. In the **Type** drop down select Outreach / Non-Residential
2. In the **Program / Location** dropdown select the program

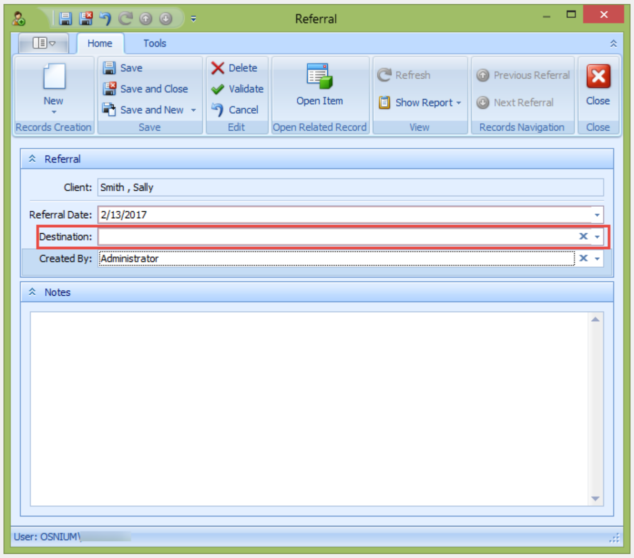
Referrals

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



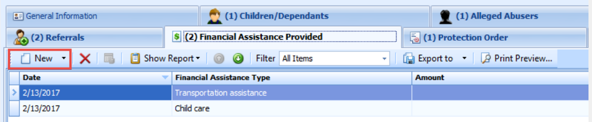
1. Click **New** in the upper left hand corner of the Referrals tab



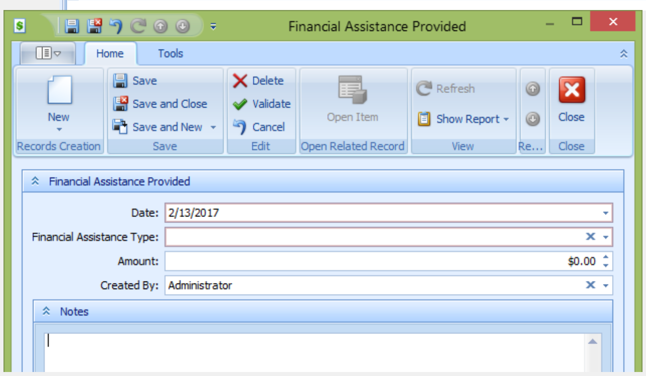
2. In the pop up select the Destination of the referral
3. Any notes associated with the referral
4. Save and Close

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.



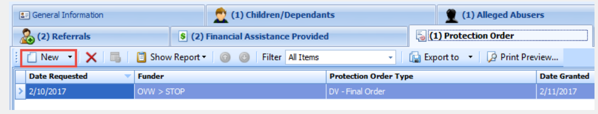
Creating a new Financial Assistance



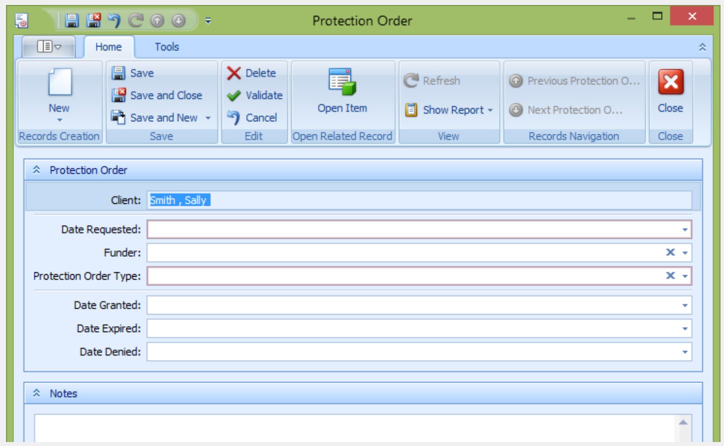
1. Click the New button in the top left hand corner of the **Financial Assistant Provided** tab.
2. Complete the pop up select a Financial Assistance Type from the dropdown list
3. Save and Close

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.



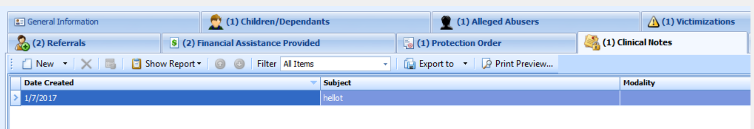
Creating a New Protection Order



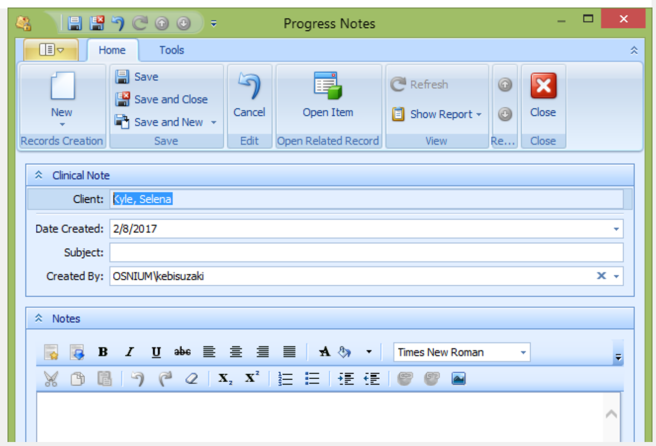
1. Click **New** in the upper left hand corner of the Protection Order tab
2. Fill in the details for the protection order
3. Save and Close

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.



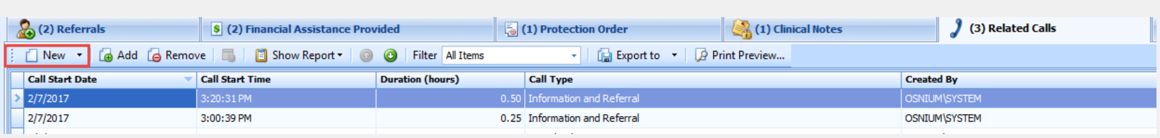
To create a new Clinical Note



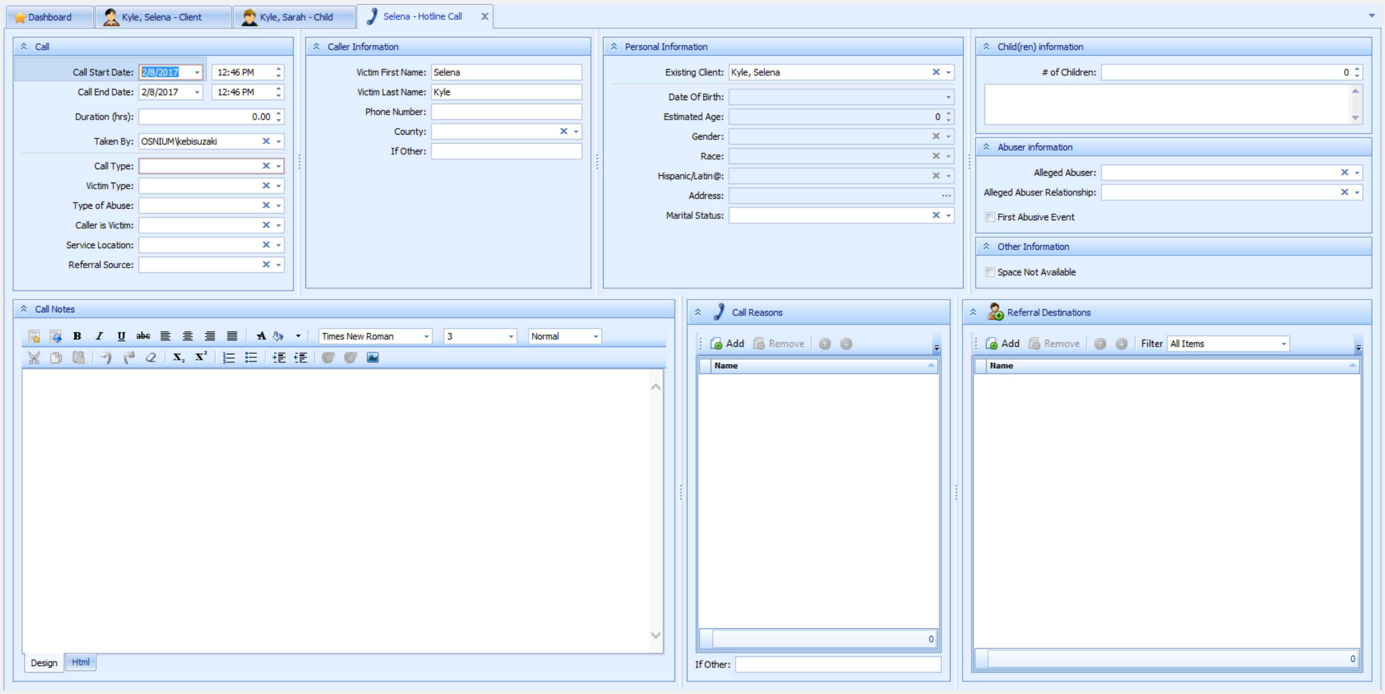
1. Click New in the upper left hand corner of the Clinical Note Tab
2. Enter the Date, Subject and Notes associated
3. Save and Close

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.



1. **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.



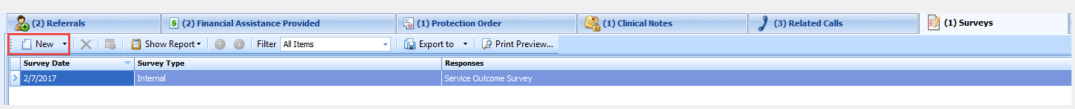
2. Add in the Call Type, Hotline or Information / Referral and any other relevant information

3. Save and Close

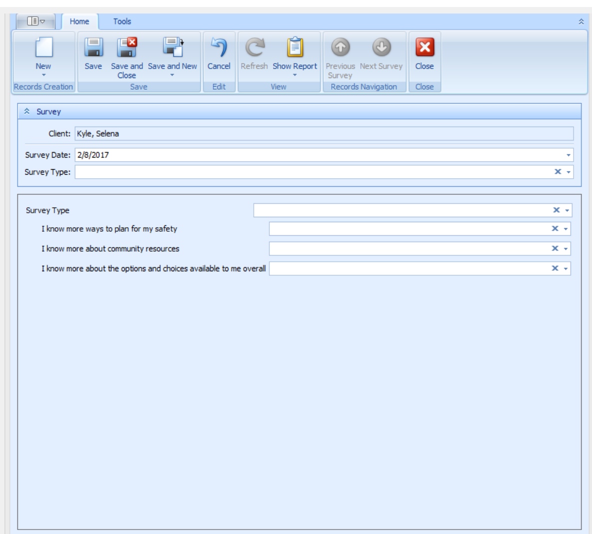
Surveys

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**



1. Click **New** in the upper left hand corner of the Surveys Tab



2. Select they type of survey by double clicking it

3. Complete the Survey

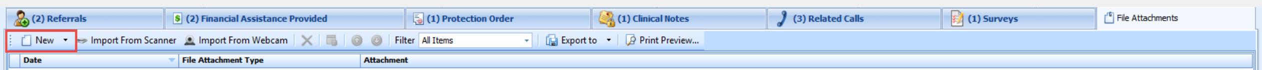
4. Save and Close

File Attachments Tab

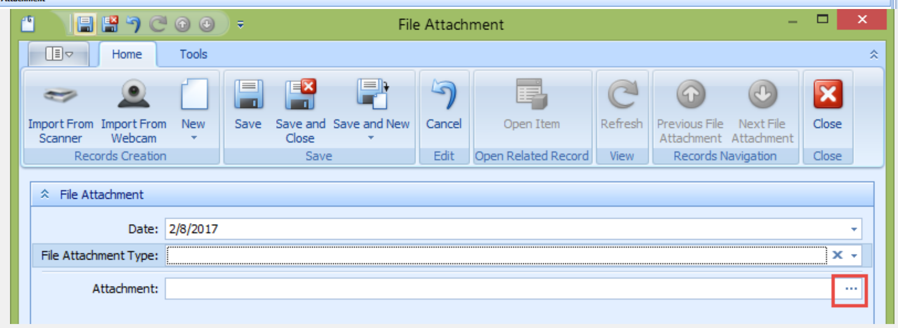
Contains a list of all **File Attachments** associated with the Client. The File Attachments are embedded into the software.

To add a New File Attachment:

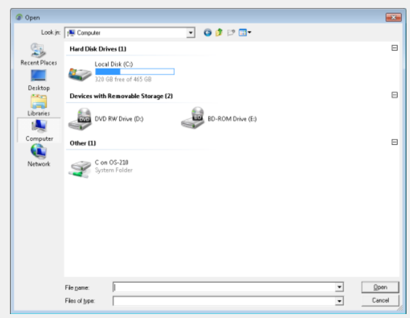
1. Click on the **New** button in the upper left hand corner on the File attachments tab.



2. Click the "dot dot dot"



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:



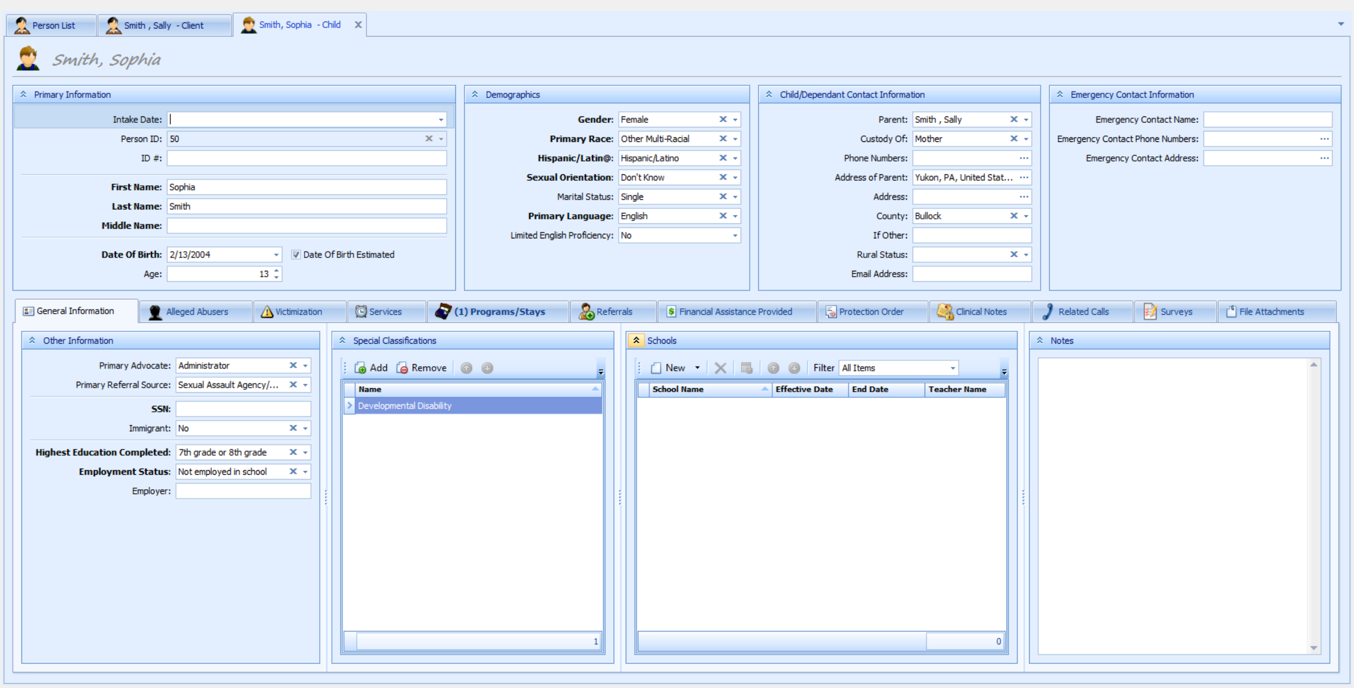
4. Save and Close the attachment window

Child Detail View

Opening a Child profile will result in the screen below.

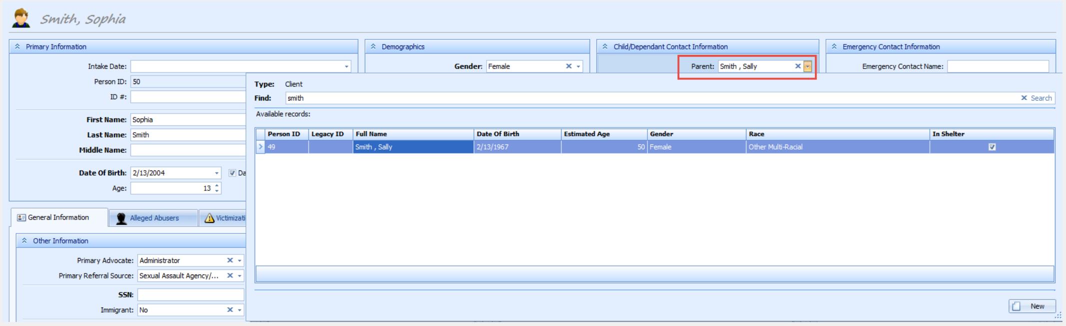
The Child Detail View contains information regarding the child. The data collected is very similar to a Client.

Please note instructions for the following fields:



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.



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:

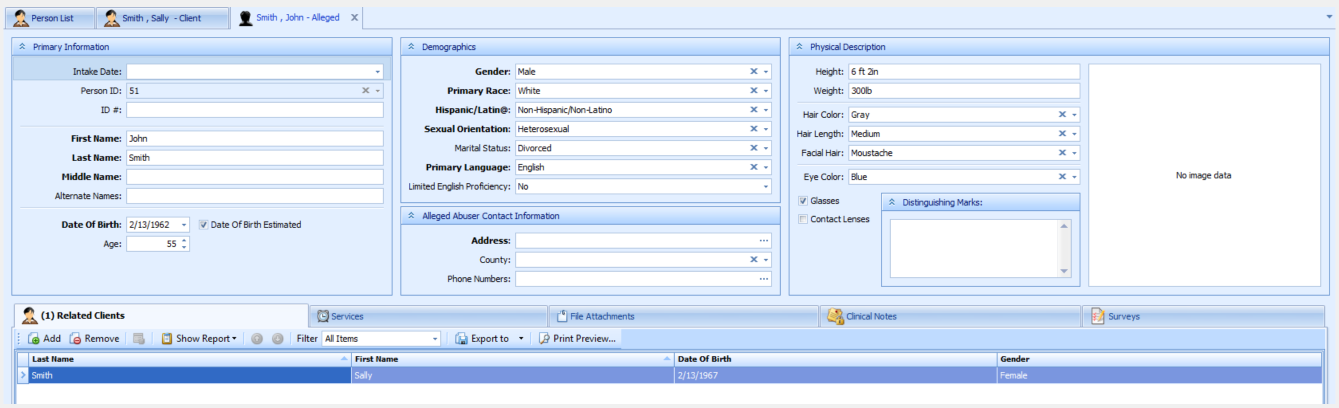


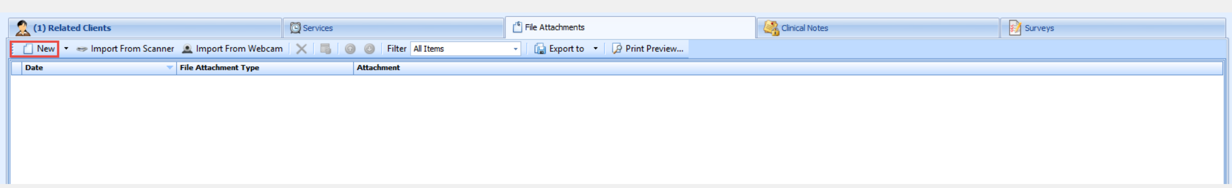
Photo:

- 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

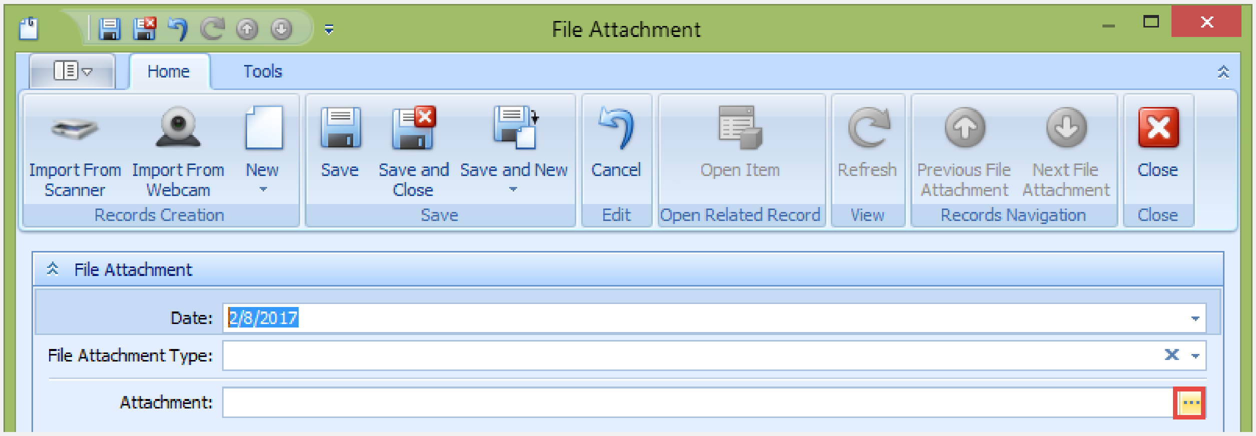
File Attachments

To add a New File Attachment:

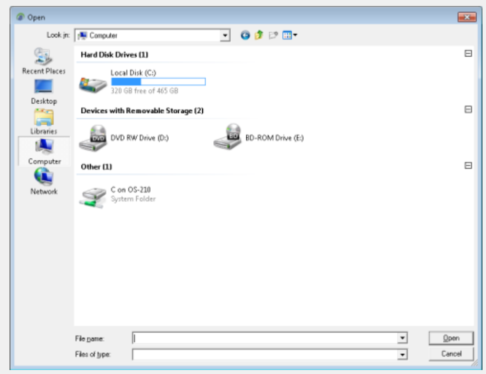
1. Click on the **New** button in the upper left hand corner on the File attachments tab.



2. Click the “dot dot dot”



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

Shelter/Stays

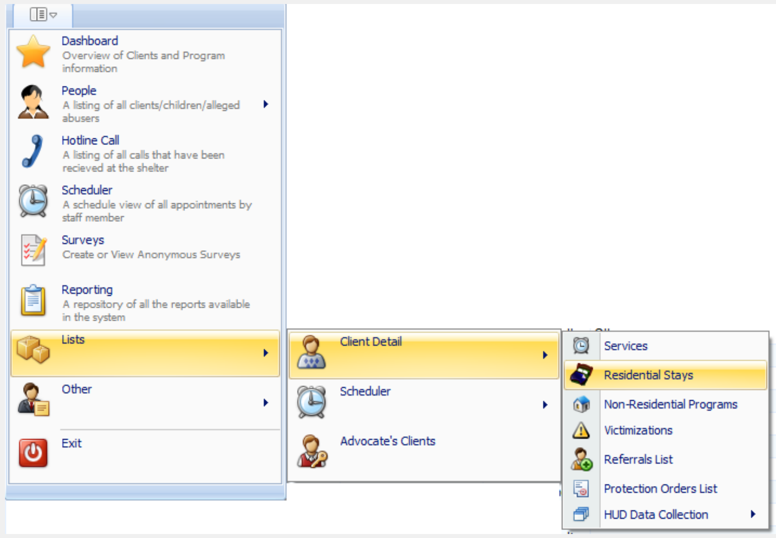
What is a Stay

Stays are used to track occupancy and bed night statistics.

Stays List View

Opening a list view

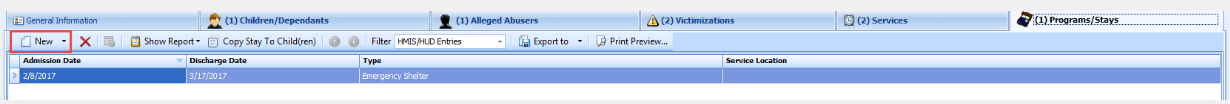
1. Select Residential Stays List from Lists in the Navigation menu



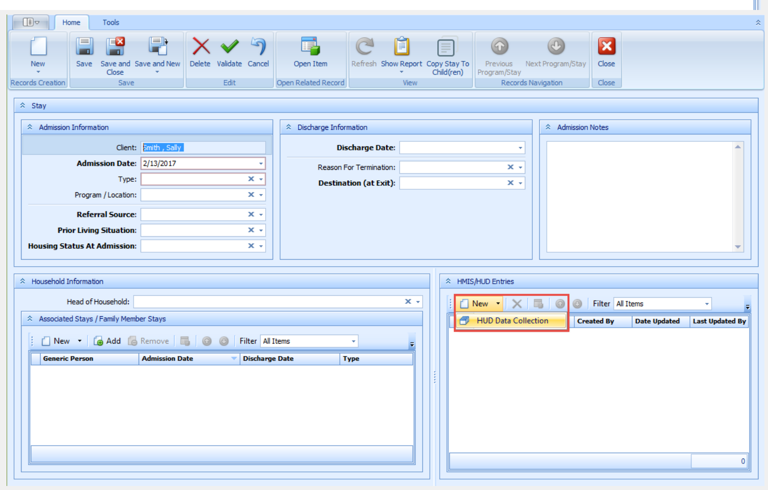
2. A list view of all the Stays in the system will open.

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



HUD Entries

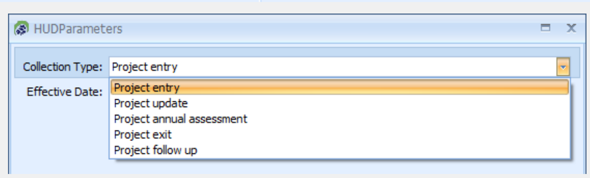


This module is used to collect HUD specific data elements for Project Entry, Project Update, Project Annual Assessment, Project Exit and Project Follow-up.

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

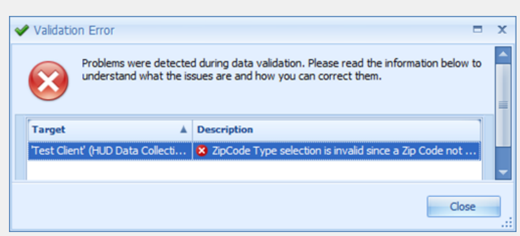
Select the Collection Type

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

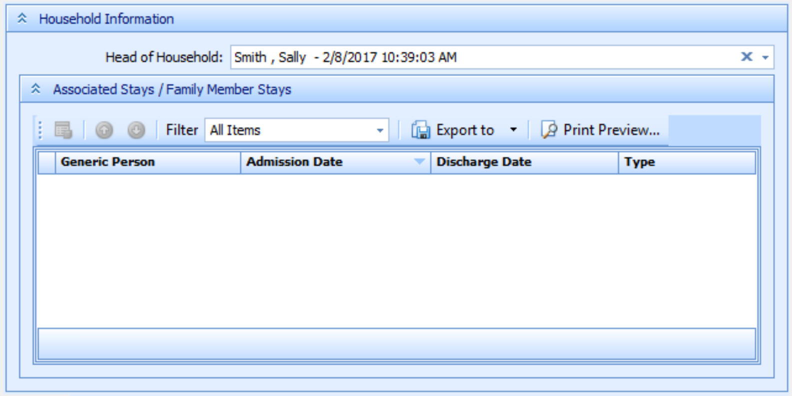


A field that has not validated successfully will be highlighted with the  icon

Household Information/ Associated Stays

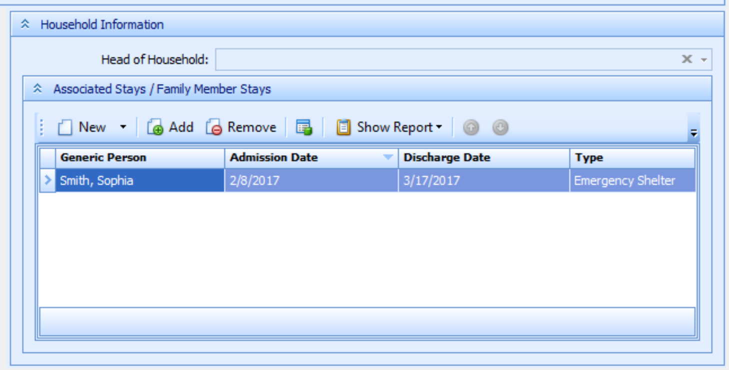
This section can be used to associate multiple Participants to a Stay. There are **three** ways to link multiple participants.

Option 1: Choose a Head of Household



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

1. 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

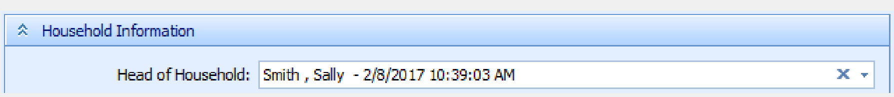
1. Create the Minor(s) stay record(s)
2. Create the Adult/Family Member's stay record
3. Click Add and select desired Participants on the Adult's Stay record

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.



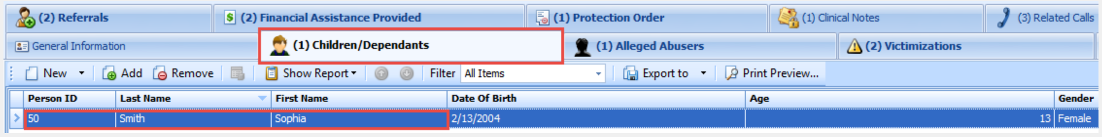
Option 3: Copy Stay to Child(ren)

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

<u>Add the Child as a Children/Dependent</u>

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

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



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

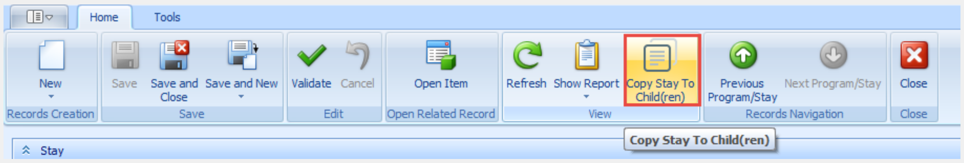
1. Open the Child record by double clicking on the Child from a person list view

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

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

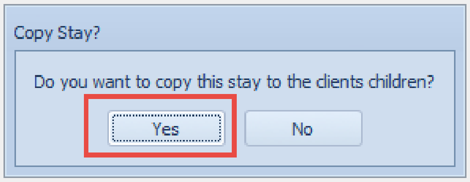
There are three ways to copy a stay to the child(ren).

Option 1:



1. Create a New Stay record for the Client

2. Enter data for the Stay record

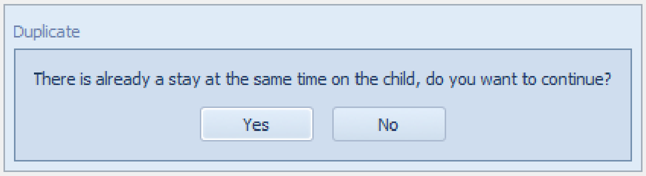


3. From the Stay record Click Copy Stay to Child(ren) in the ribbon

4. Click Yes on the pop up window

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.



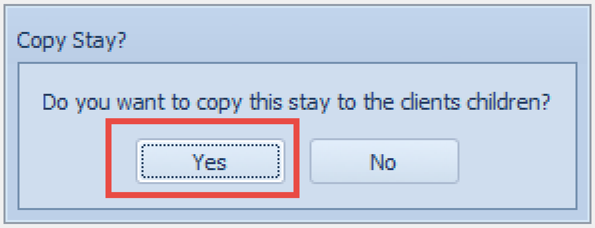
6. Save the Client record

Option 2:

1. Create a New Stay record for the Client

2. Enter data for the Stay record

3. From the Stay record, click Save and Close. A window will automatically pop up asking if you want to copy this stay to the Client's children.



4. Click Yes

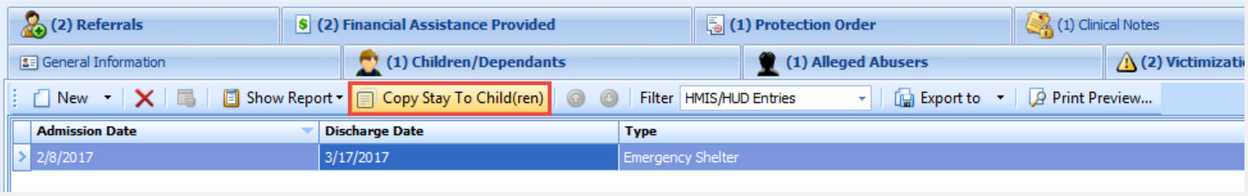
5. Click Save and Close again

6. Save the Client record

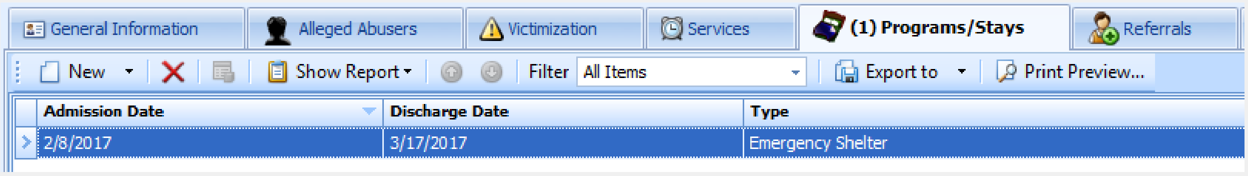
Option 3:

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)



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



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.

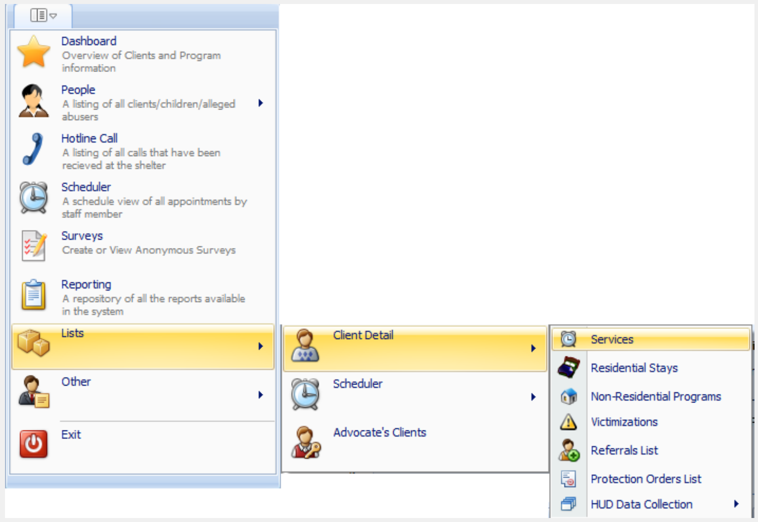
Services

What is a Service

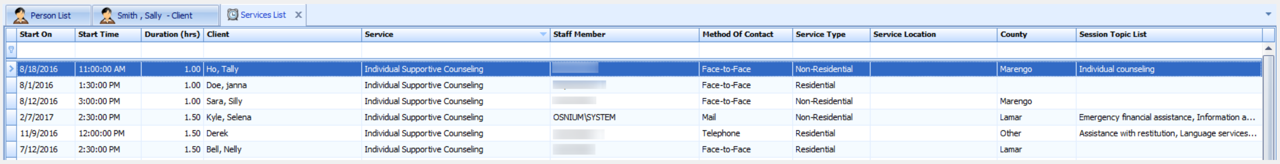
Services is used to track any services provided to the Participant. Each service provided can be associated to one or many Persons, as well as one Staff Member.

List View of Services

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

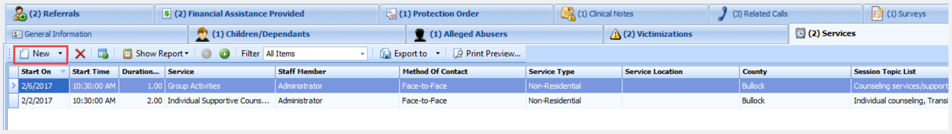


2. A full list of Services will open

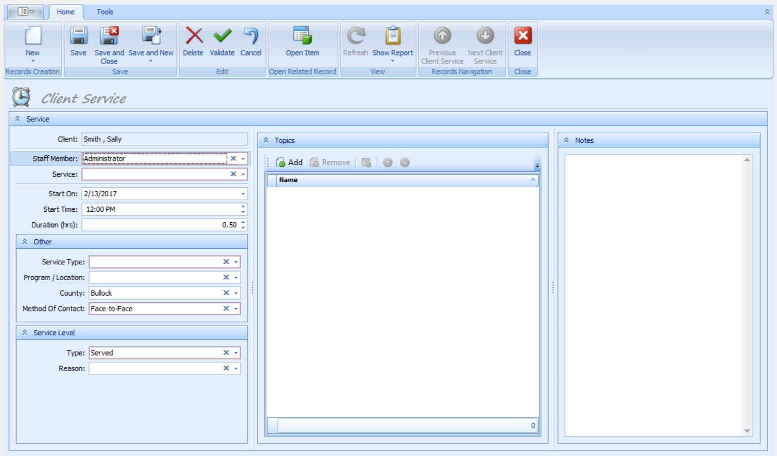


Creating a New Service

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



1. Open a Client or Child profile
2. 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

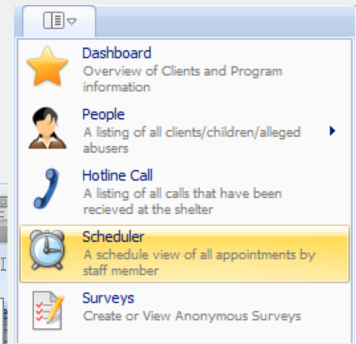
- **Full Name:** Client or Child receiving the Service provided is automatically populated

- **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
    - Click the + to expand the list
    - Hold Ctrl to select multiple items

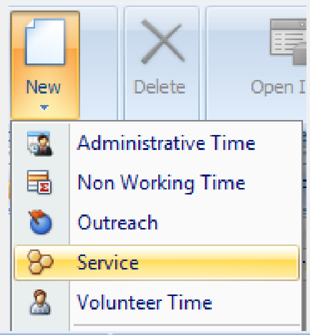
Creating a Group Service

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

1. Open the Scheduler



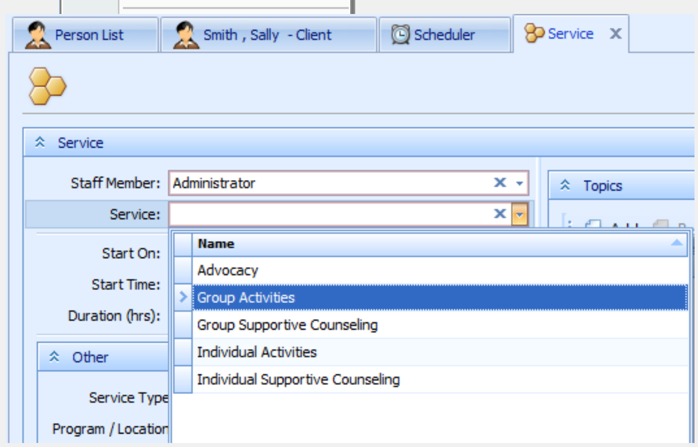
2. There are two options to create a New Group Service



Option 1.

Click New in the Ribbon and select Service

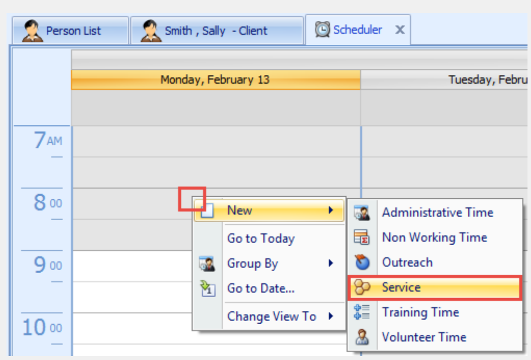
Select Group Service from Service drop down



Option 2.

Right click on the Scheduler and Select New → Service

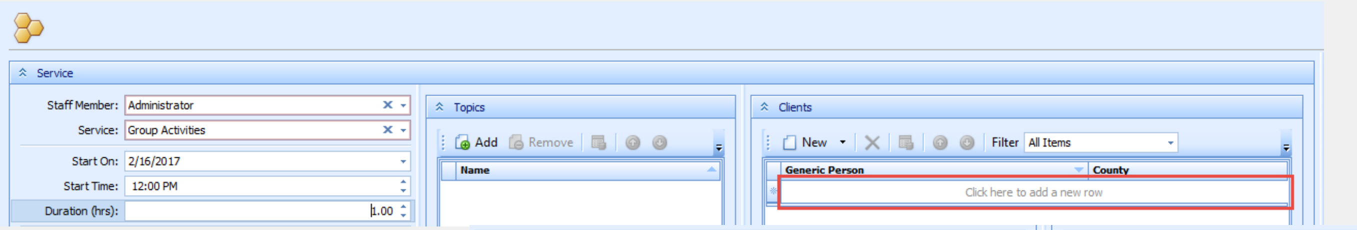
Select Group Service from Service drop down



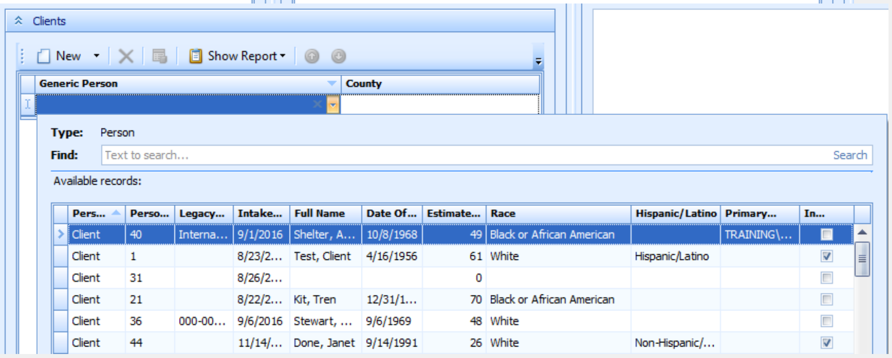
Inputting Details for the Group Service

1. Add details (date, time, program, service, etc.) for the Service.

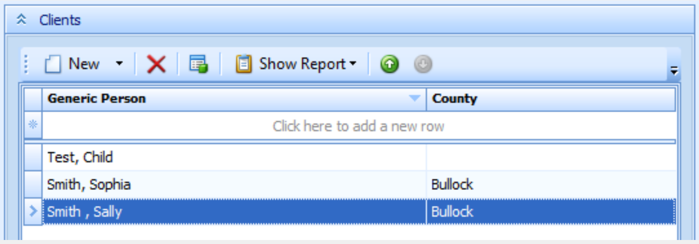
2. Click "Click here to add a new row" to add multiple Clients to the record.



3. A drop down list will appear. To find a client, type their name in the Find box and hit enter.



4. A list of selected clients will appear in the Batch Entry section.

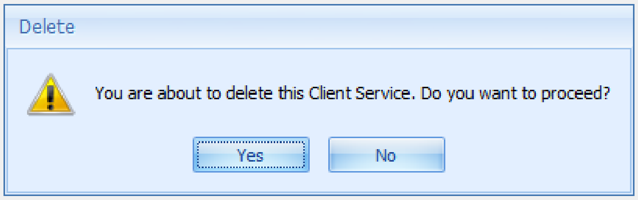


Removing a Client from a Group Service

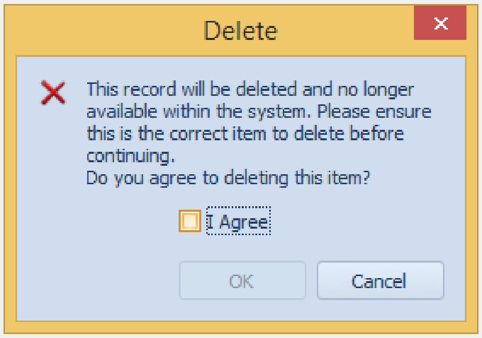
To delete a client from the Group Service

1. Select the client and click 

2. 2. Select Yes.



3. Click I Agree and click OK.



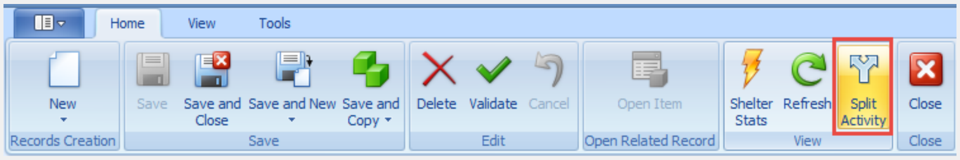
On the **Client Detail View**, the **Service will show up on all Client profiles listed**. If you edit the Service details on one client profile, it will edit the service details for all Clients. You must split the group service if you wish to edit the services separately.

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.

Splitting a Group Service

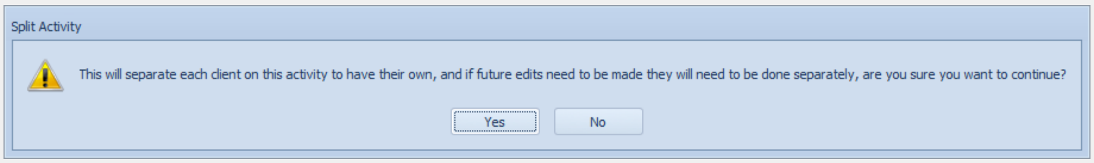
Splitting an Activity is used to **split a singular batch entry record into multiple records.**

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
4. Click Split Activity
5. Select Yes

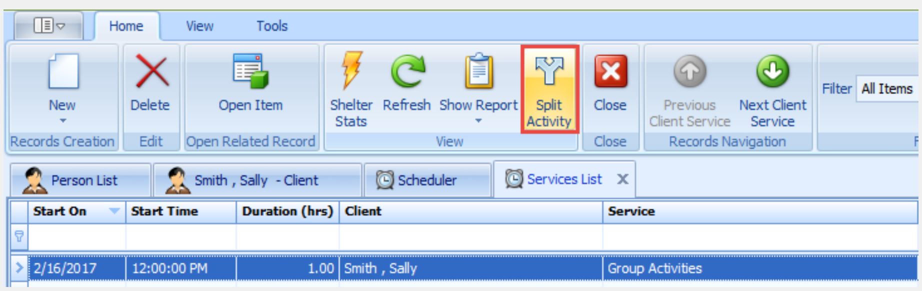


6. Save the Case Management

IF Service already exists in the system

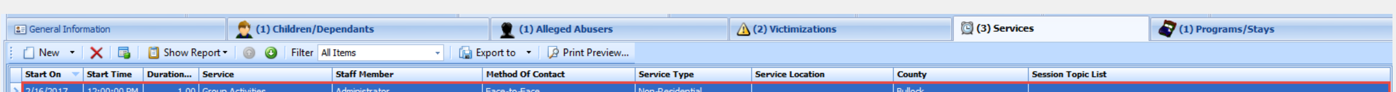
Option 1: Split Activity from Service List View

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

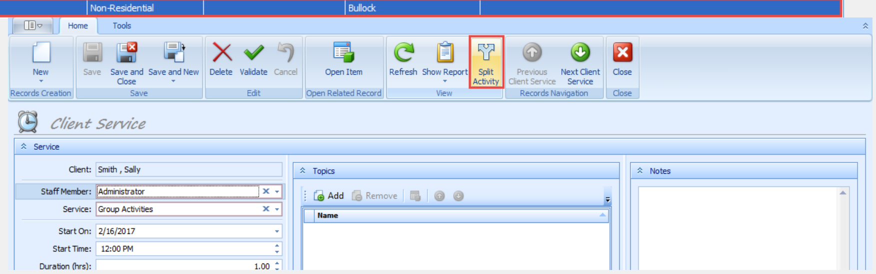


Option 2: Split Activity from Client Profile

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



4. Select Split Activity from the Ribbon
5. Select Yes
6. Save or Save and Close



*****Once the Activity is split, future edits need to be done separately*****

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

Victimizations

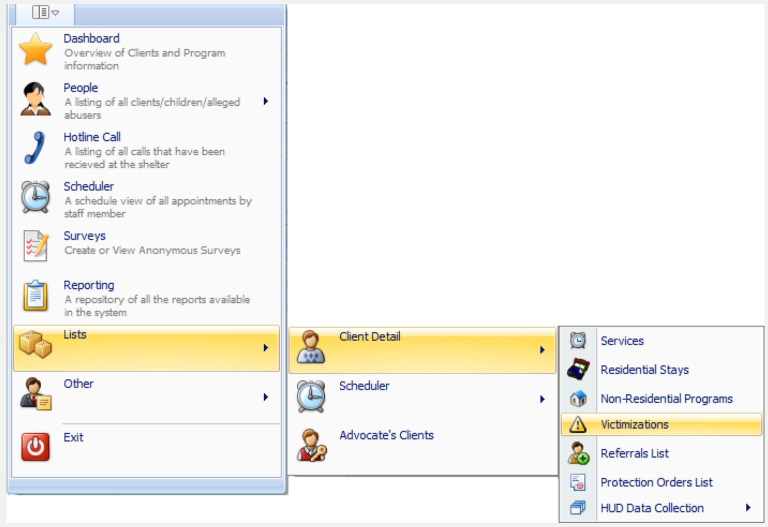
What is a Victimization

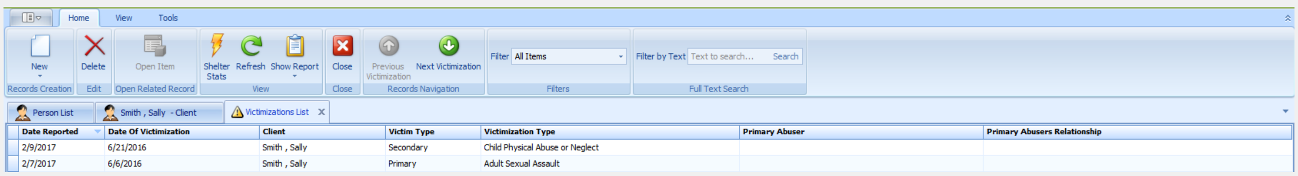
A **Victimization** is a date and time record linked to a Client that is used to record victimization type and victimization details.

Victimization List View

Opening the Victimization List View

1. 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

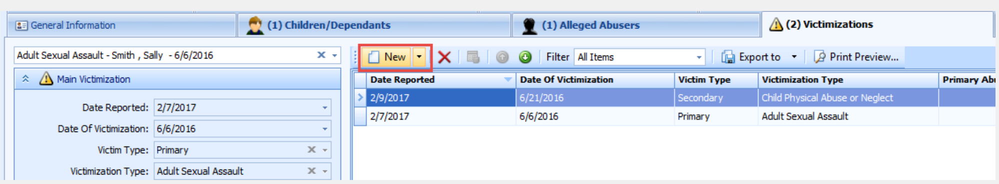




Creating a New Victimization

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

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

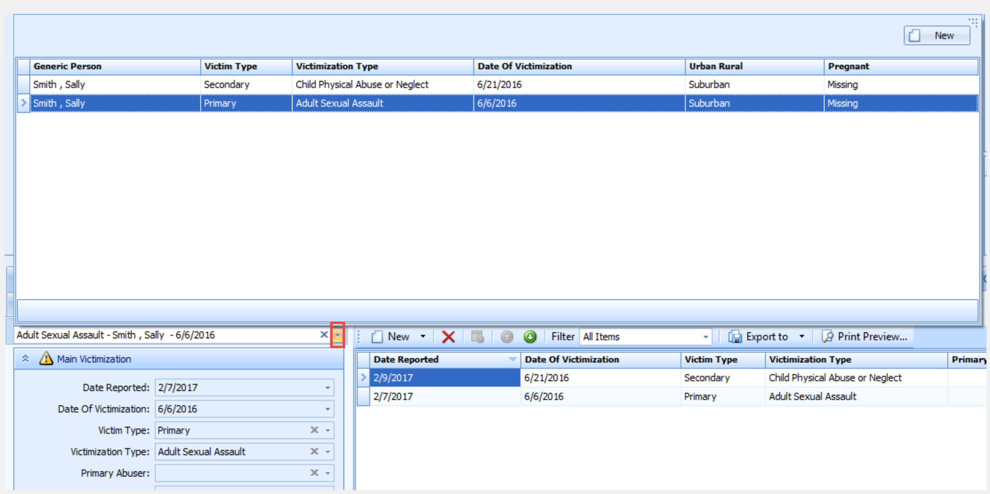


Selecting a Main Victimization

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
3. Click Main Victimization and select a Victimization from the list

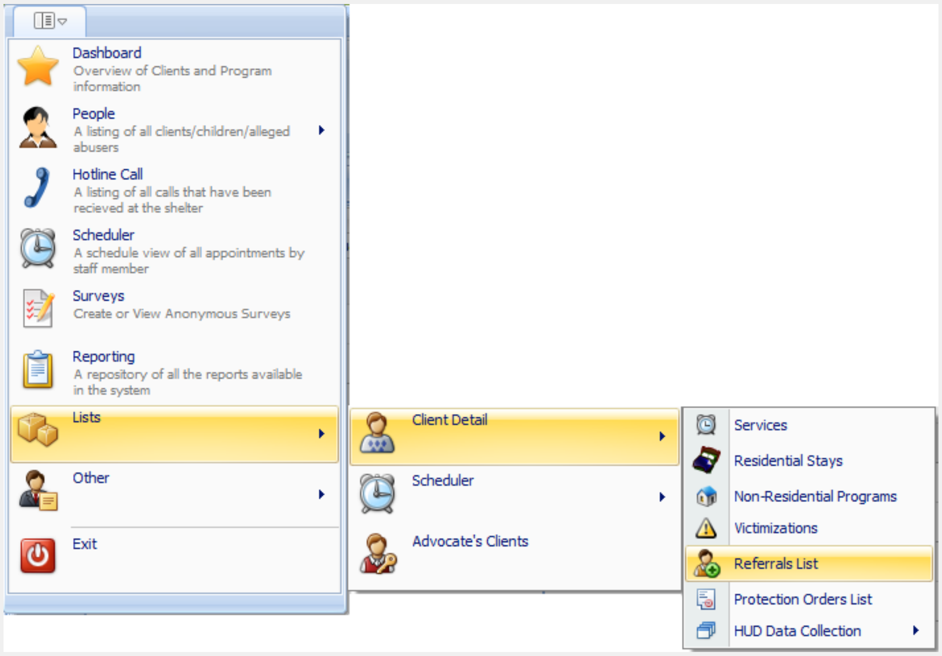


Referrals

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

1. Select Lists → Client Detail → Referrals List from the Navigation Menu

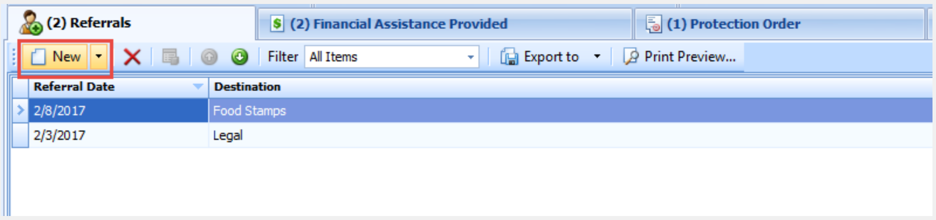
2. A list view of all the Referrals will open

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



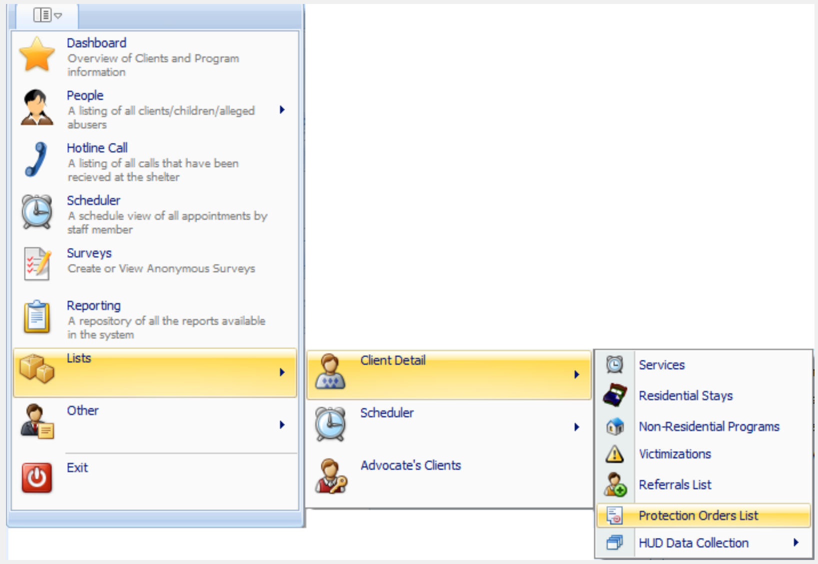
3. Enter the Referrals Details

4. Save and Close

Protection Orders

What is a Protection Order

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



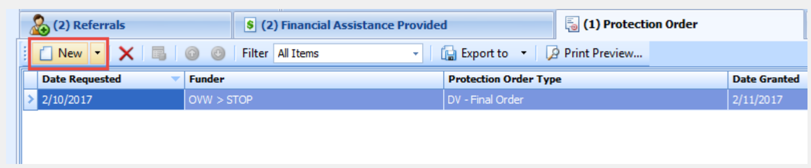
Protection Order List View

Opening a Protection Order List View

1. 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**

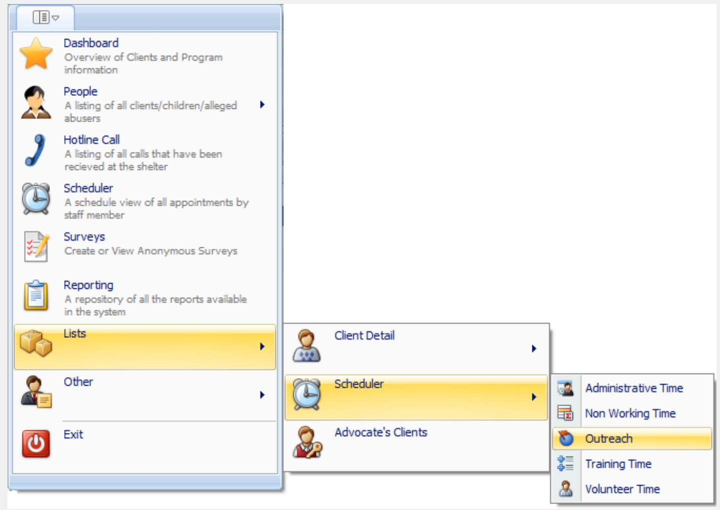


1. Open a Client Detail View
2. Click New in the Protection Order tab
3. Enter Details
4. Save and Close

Outreach Event

What is an Outreach Event

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

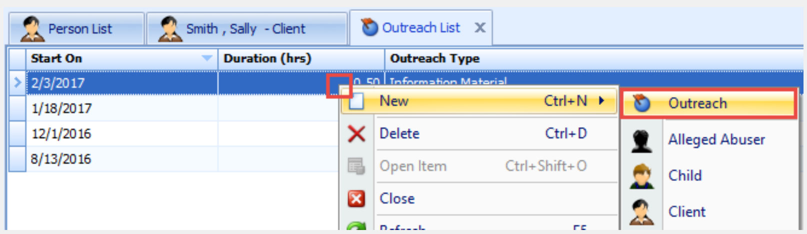
Opening the Outreach/Education List View

1. Select Outreach/Education from the Navigation Menu

Creating a New Outreach Event

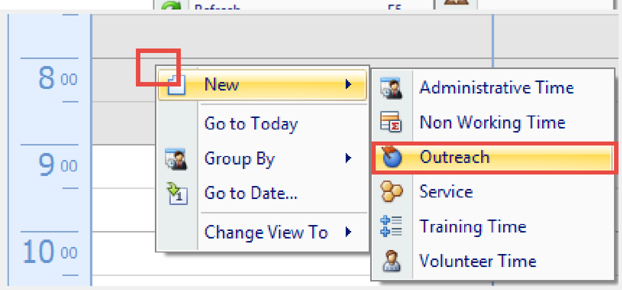
Creating an Outreach Event from the List View

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

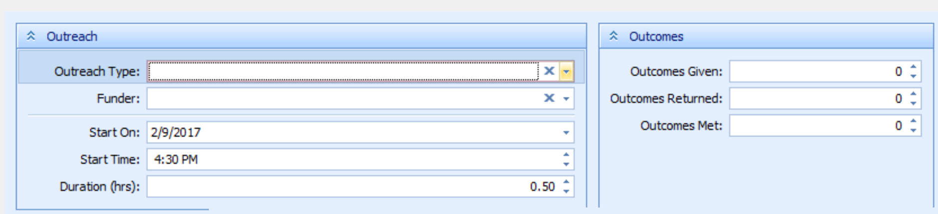


Creating an Outreach from the Scheduler

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



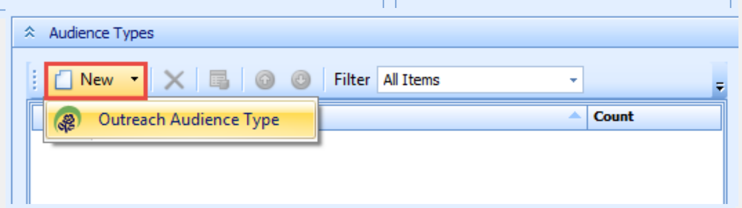
Inputting Data for the Outreach



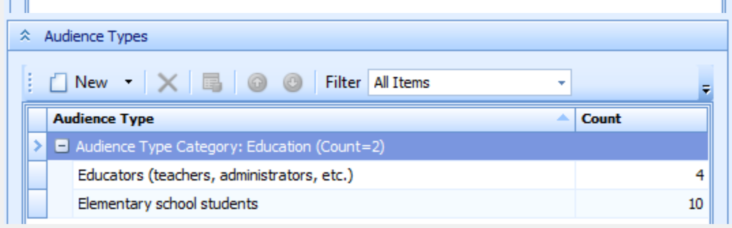
Audience Type: Which Audience type attended the Outreach/Education and how many of each type attended. You can enter multiple types.

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**.

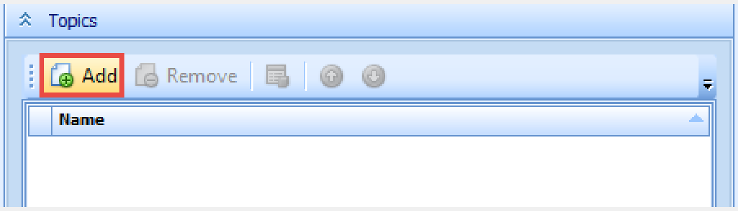


For Example:



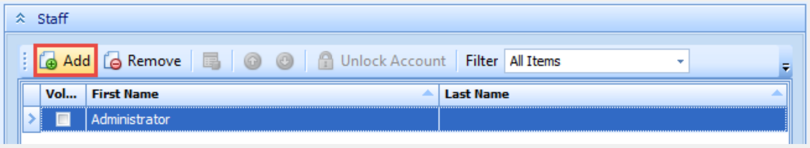
Topic: Topics covered during the outreach event

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)



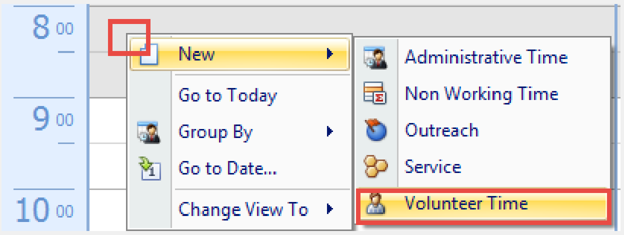
Volunteer Time

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

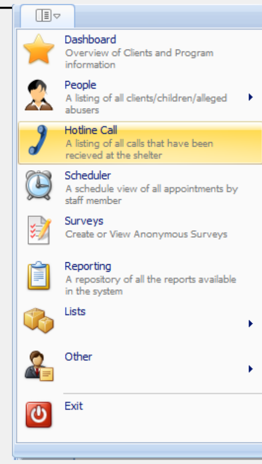


1. Open the Scheduler
2. Right click on the scheduler, hover over New then click Volunteer Time

Hotline Call

What is Hotline Call

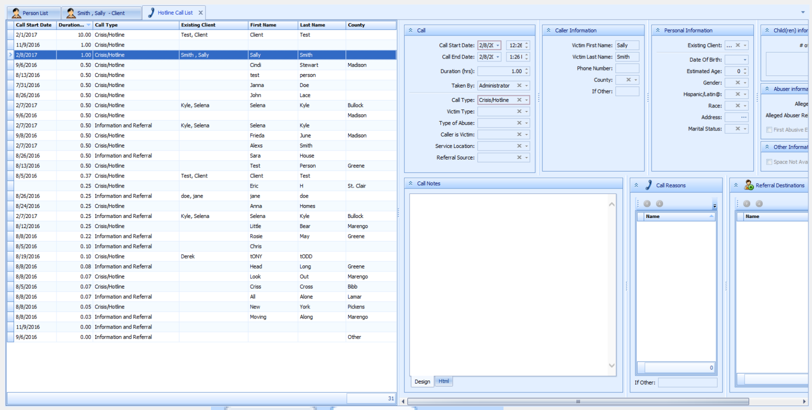
Hotline Call is used to view existing call records and create new calls



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

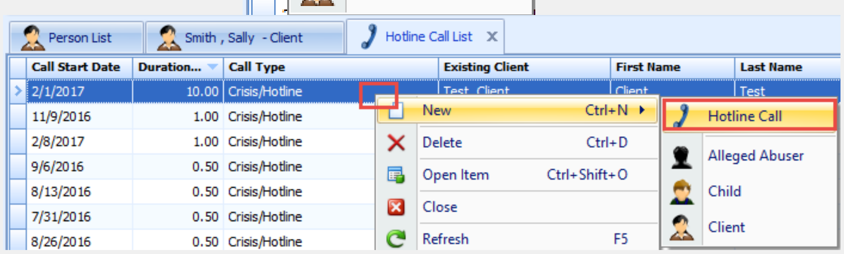
1. Click New on ribbon and select Hotline Call

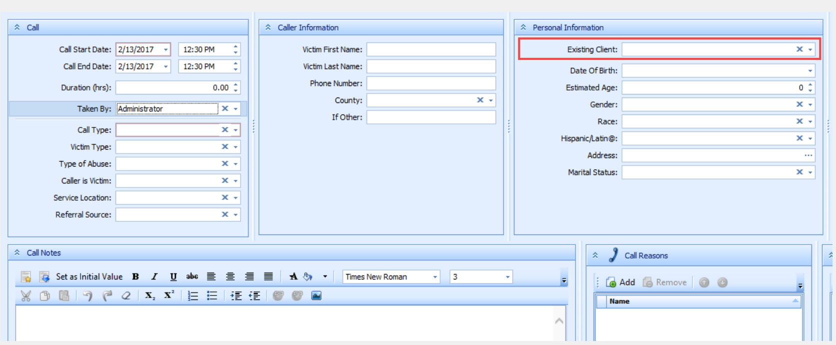
2. A New Hotline Call will automatically open

Option 2

1. Right click on a call

2. Select New → Hotline Call



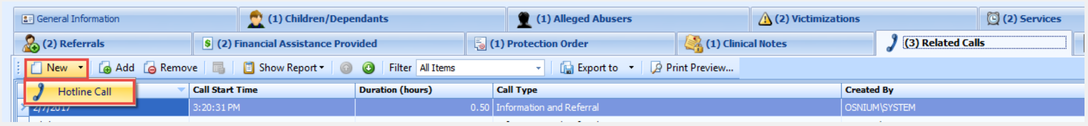


If Existing Client:

1. Select the Client from "Existing Direct Service Client List"

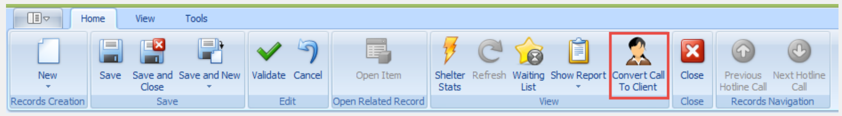
Creating a Hotline Call from the Client Detail View

1. Open a Client Detail View

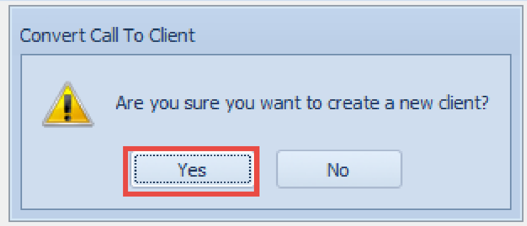


2. Select the Calls Tab
3. Select New in the upper left hand corner of the Calls Tab

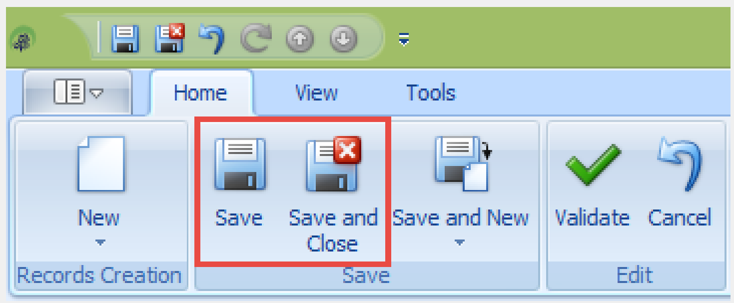
Converting Call to Client



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

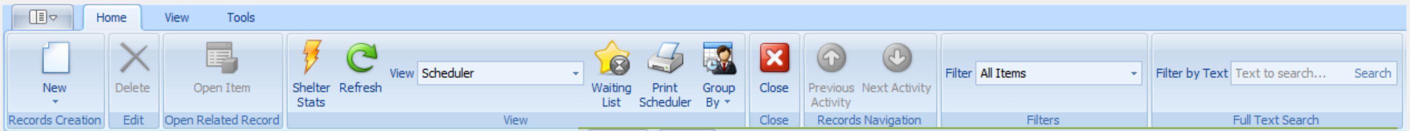


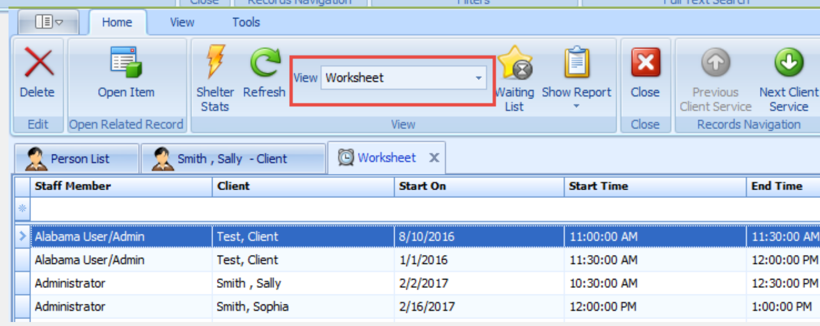
5. Save the Hotline Call
6. A new Client is now created and the current Hotline Call will be added to their Client record

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





Staff Member	Client	Start On	Start Time	End Time
Alabama User/Admin	Test, Client	8/10/2016	11:00:00 AM	11:30:00 AM
Alabama User/Admin	Test, Client	1/1/2016	11:30:00 AM	12:00:00 PM
Administrator	Smith , Sally	2/2/2017	10:30:00 AM	12:30:00 PM
Administrator	Smith, Sophia	2/16/2017	12:00:00 PM	1:00:00 PM

View

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

Group By

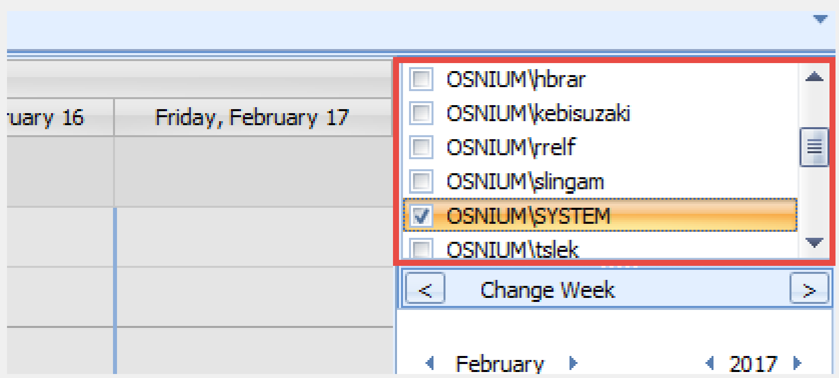
Group By is a view variant of the scheduler. Users can see the Scheduler in Groups by Date or Resource Please discover this feature yourself to see what works best for your day to day entry of information.

Scheduler features

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

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.



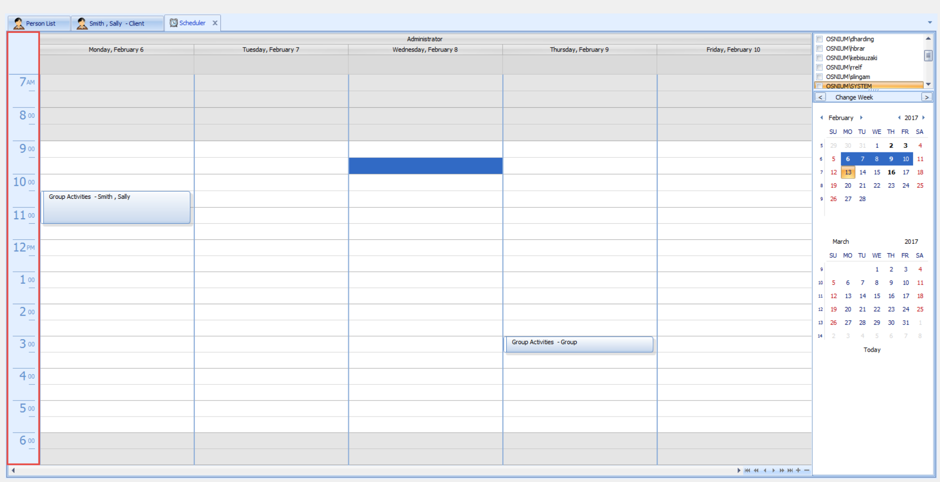
Time Increments

The Scheduler can display Activities by various time increments.

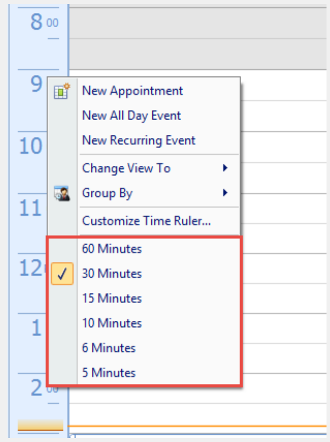
Increments Area (highlighted in red)

Accessing the Increments

1. Right click on the Increments Area



2. Select an appropriate increment



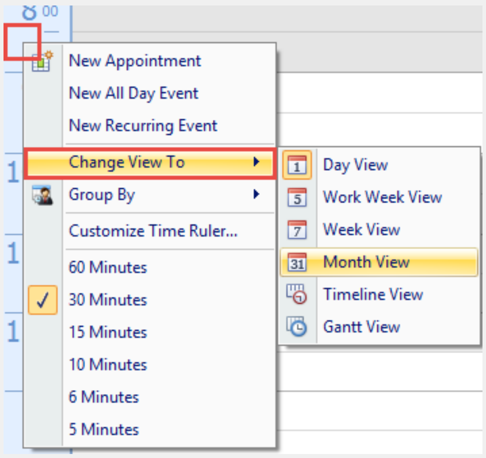
3. The current increment will be displayed with a check mark to the left of the increment 

Alternate Views

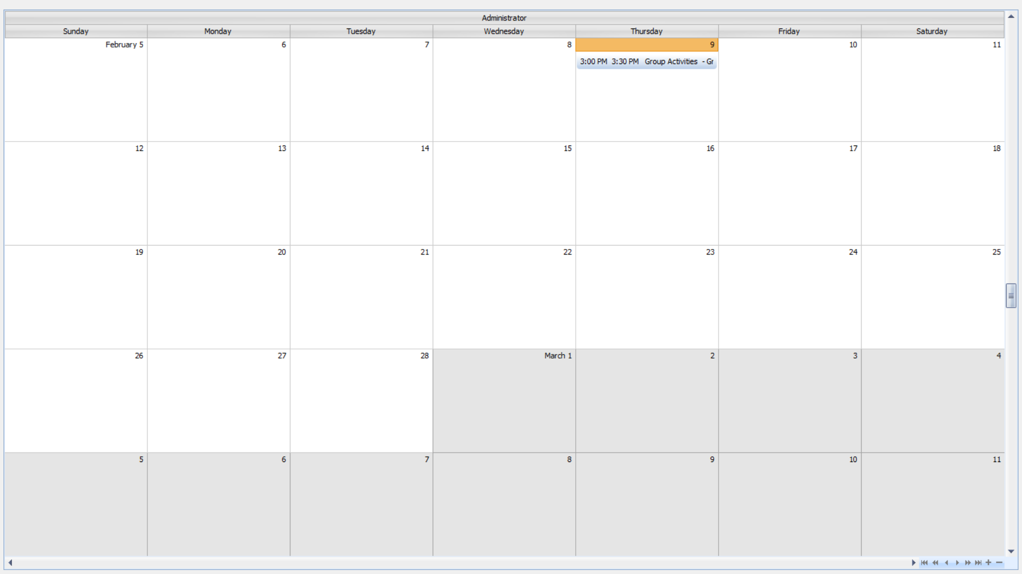
1. Right click on the Increments Area

2. Hover over Change View To >

3. Select a view

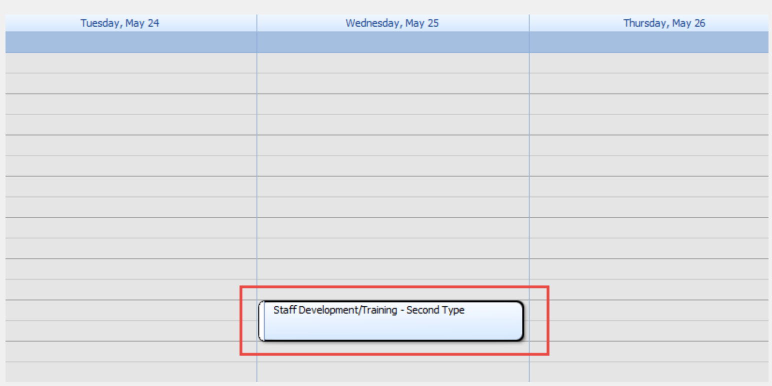


Monthly view can be seen below



Copy and Pasting Events within the Scheduler

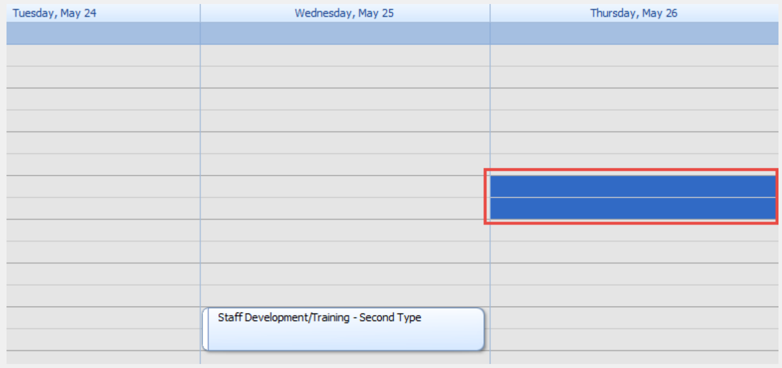
Events such as volunteer time, group service, etc. can be copied and pasted within the scheduler if they occur more than once.



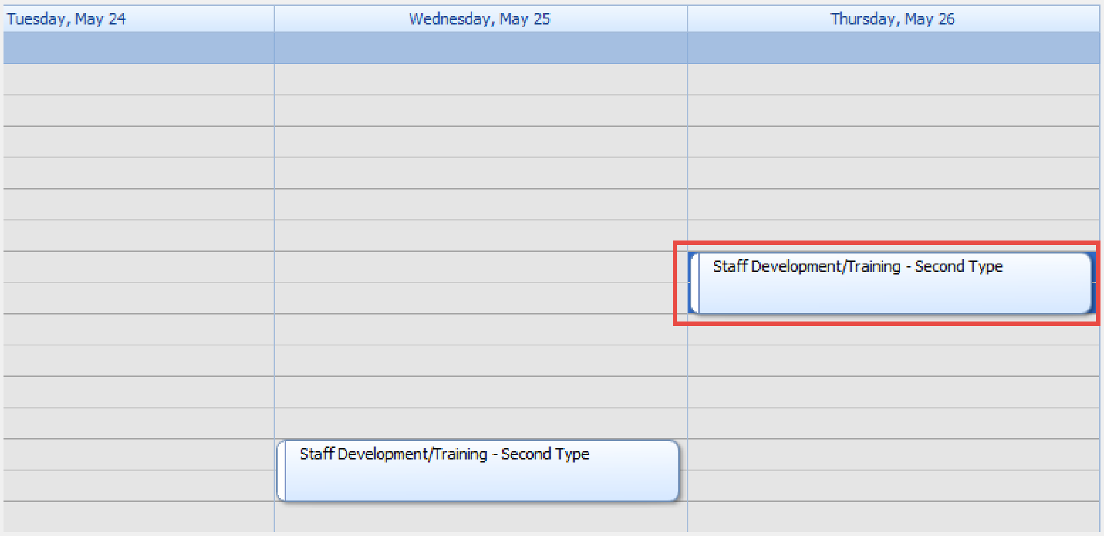
1. Create an Event (Ex. Staff Development)

2. Click on the event in the scheduler

3. Hit CTRL + C on your keyboard
4. Click the desired time frame for the new event (it will be highlighted with blue)



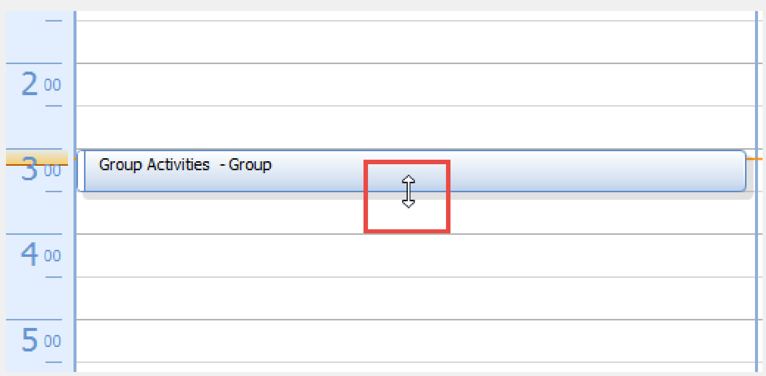
5. Hit CTRL + V on your keyboard
6. The event will be created for the highlighted time frame



Editing Events from the Scheduler

Extending and Shortening an Event from the Scheduler

1. 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. Drag and drop the event in the desired time frame

Shortcuts

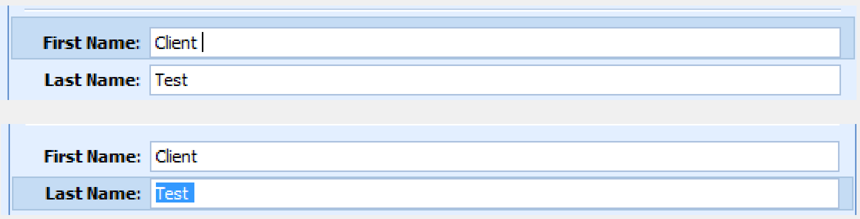
Here are a few tips, tricks and shortcuts to navigate the software.

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**
2. Clicking the **Tab** button on the keyboard will move the cursor the First Name (next field in the list) and highlight the text

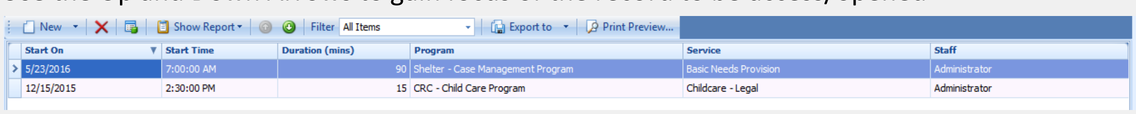
Additional note, holding the **Shift** button and clicking **Tab** will bring the cursor to the previous field.

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



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:

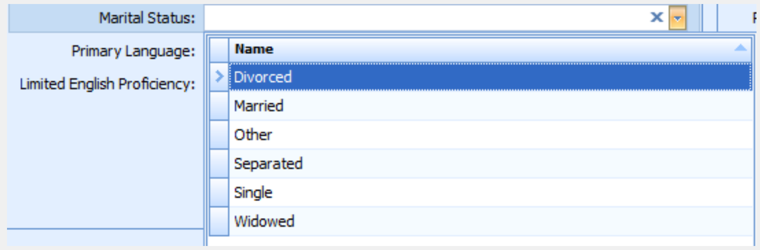
1. Gain focus of the Address field
2. Press the **Space Bar**
3. Returning back to the previous screen by hitting **Enter**, or by clicking the **Ok** button.

Drop Downs

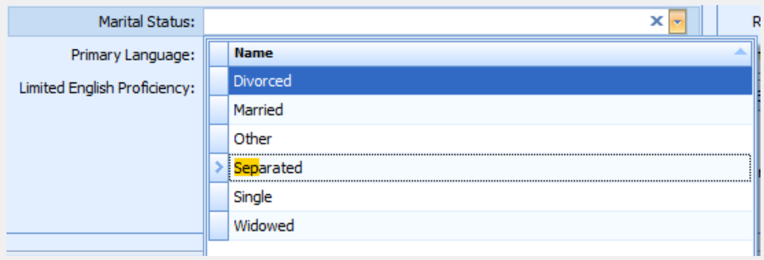
Selecting a value from a drop down doesn't require the use of a mouse.

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

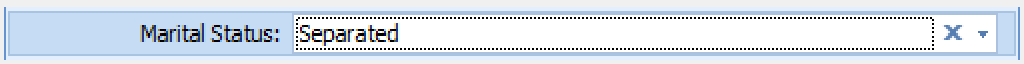
2. To select a value there are two options:
    a. Click the **Space bar** to open the drop down



    b. Type the first few letters of the value you are looking for



3. Navigate through the list of drop downs using the **up and down arrows** on your keyboard. Clicking **Enter** will select the value.

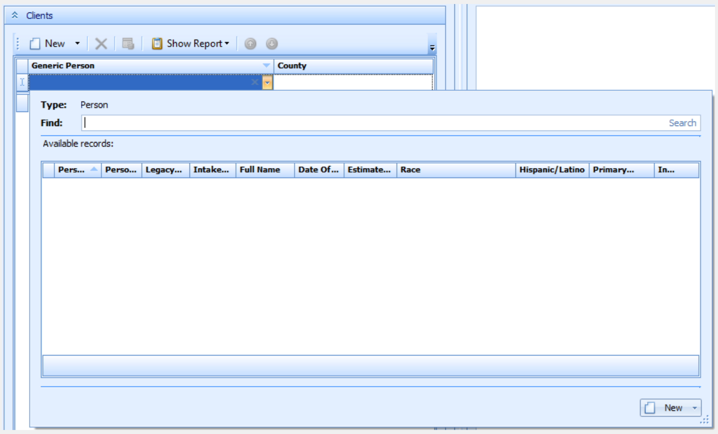


Additional note: clicking **ESC** while the drop down list is open will cancel the current select and revert to the value before this process. If the value was blank before this process the **ESC** button will leave it blank.

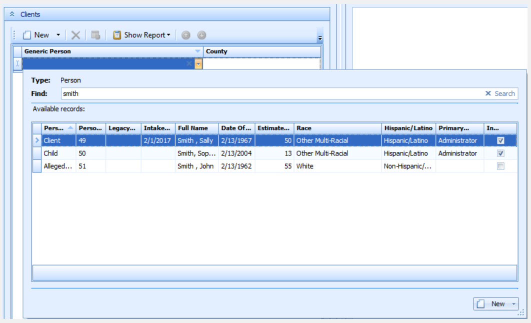
Drop downs and Searching

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

1. 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

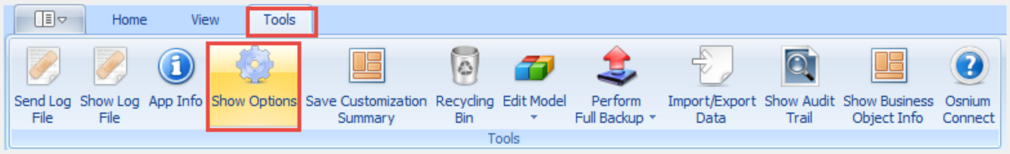
Setup Agency-Shelter information

Accessing Program Options

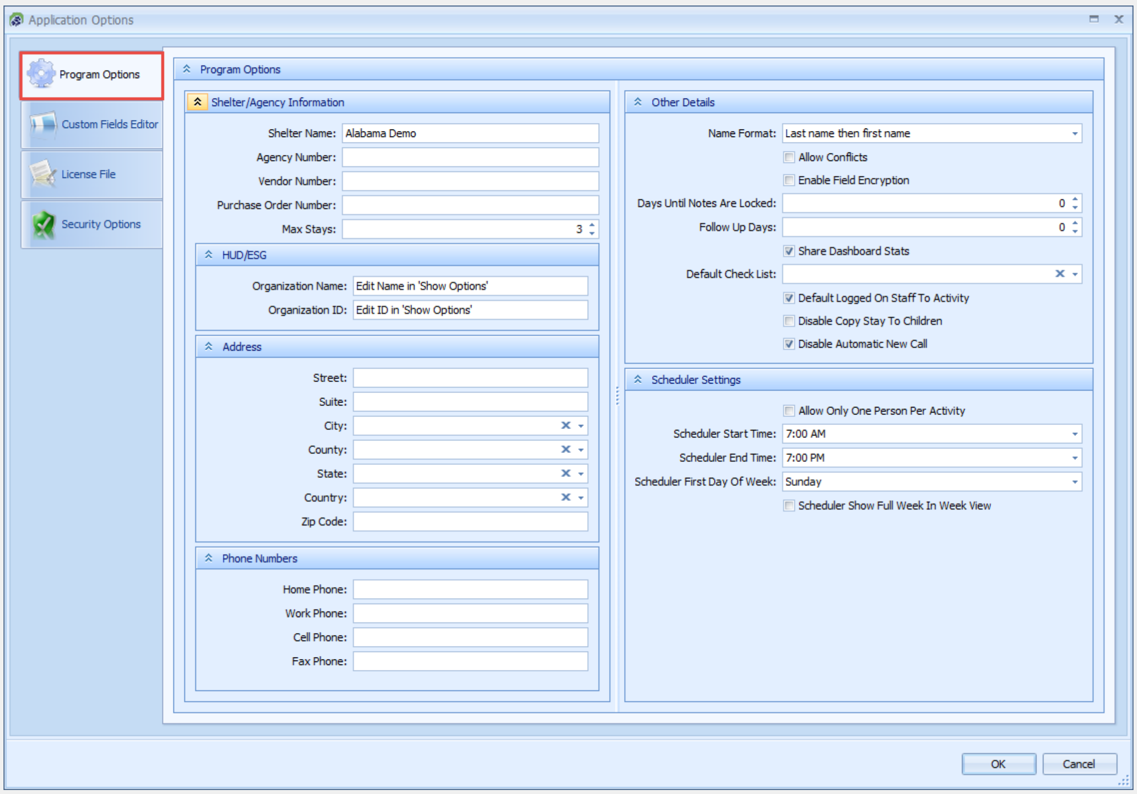
Please login as an Administrator (Primary User) to access and modify Program Options

To open the Program Options (or Show Options)

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



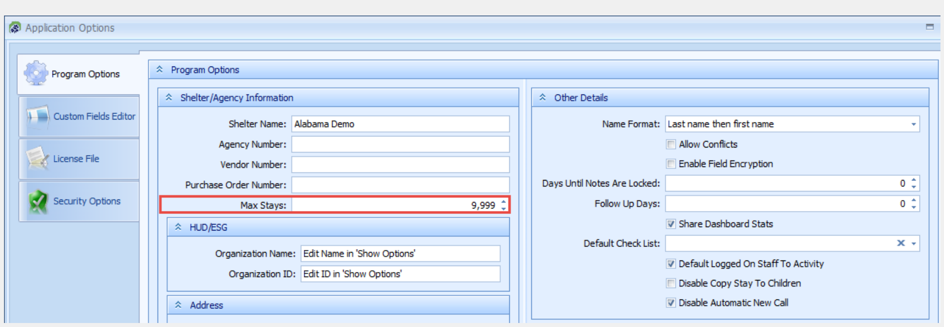
3. On the **Program Options** tab, enter any of the required information, click Ok when ready to Save



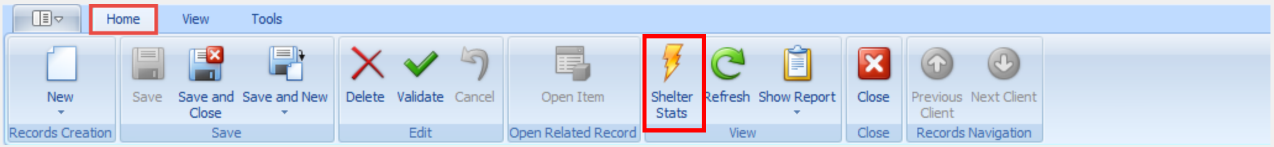
Setup Shelter Beds/Max Stays

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

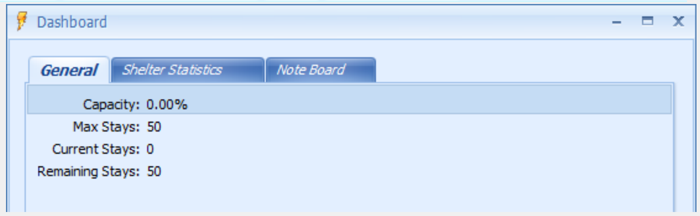
   Click on the **Home** tab



Click on **Shelter Stats**



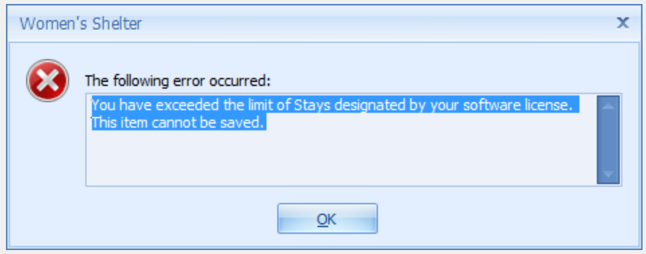
Max Stays is now showing 50 because the Program Options were updated:



Exceeded Stay Limit Message

Software License has exceeded the limit of Stays

Typical Error Message when there are too many Stays:

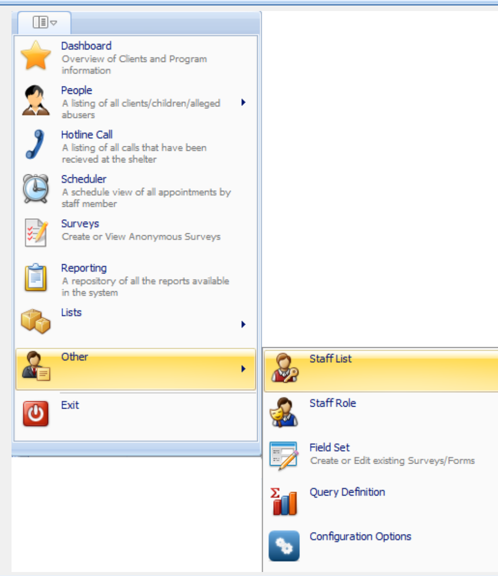


This message means that there are too many Stays (with no Discharge Date), exceeding the Max Stays in Program Options.

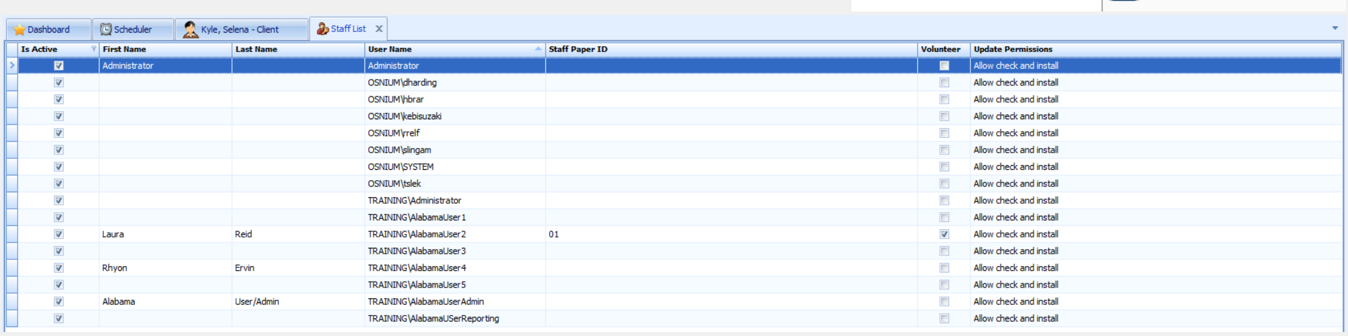
Creating Staff/Users to login to WS

Navigating to Staff List View

1. Open the **Navigation Menu**
2. Select Users > Staff List



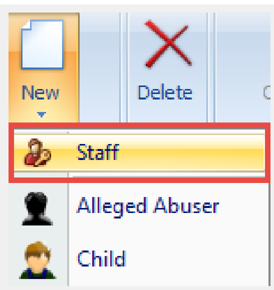
3. A list of all of your Staff members will open



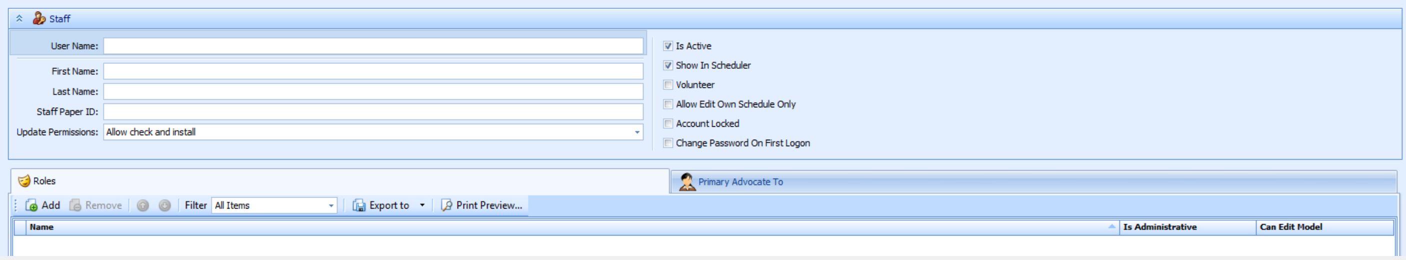
Is Active	First Name	Last Name	User Name	Staff Paper ID	Volunteer	Update Permissions
✓	Administrator		Administrator			Allow check and install
✓			OSNIUM\dharding			Allow check and install
✓			OSNIUM\hbrar			Allow check and install
✓			OSNIUM\kebisuzaki			Allow check and install
✓			OSNIUM\rrelf			Allow check and install
✓			OSNIUM\slingam			Allow check and install
✓			OSNIUM\SYSTEM			Allow check and install
✓			OSNIUM\tslek			Allow check and install
✓			TRAINING\Administrator			Allow check and install
✓			TRAINING\AlabamaUser1			Allow check and install
✓	Laura	Reid	TRAINING\AlabamaUser2	01	✓	Allow check and install
✓			TRAINING\AlabamaUser3			Allow check and install
✓	Rhyon	Ervin	TRAINING\AlabamaUser4			Allow check and install
✓			TRAINING\AlabamaUser5			Allow check and install
✓	Alabama	User/Admin	TRAINING\AlabamaUserAdmin			Allow check and install
✓			TRAINING\AlabamaUSerReporting			Allow check and install

Creating a New Staff Member

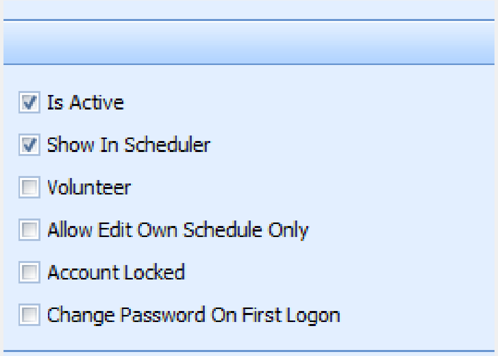
1. Click **New** > **Staff** in the Ribbon



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



4. Select Appropriate check boxes



Is Active: The Staff member is a current Staff member

Show in scheduler: The Staff member's activities will show in the scheduler

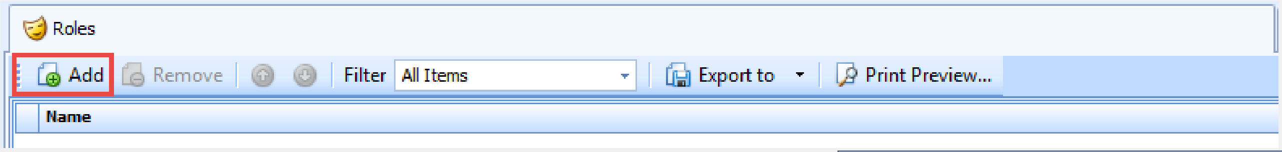
Volunteer: The Staff member is a volunteer

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

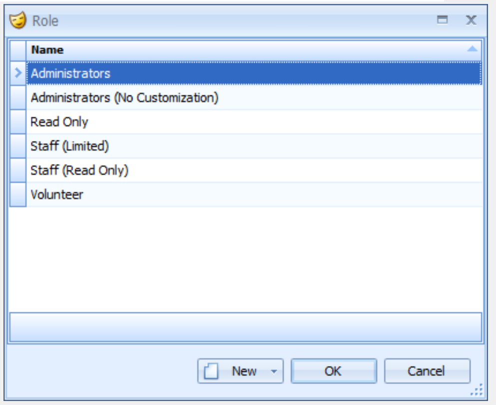
Account Locked: The Staff member is unable to login

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

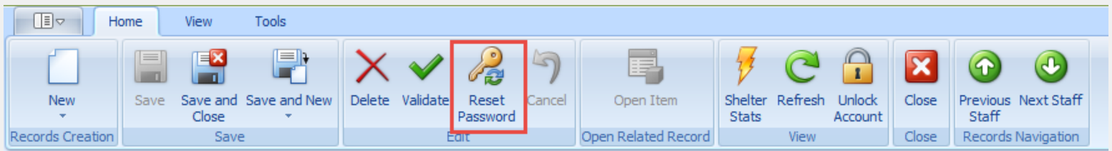


6. select desired role(s) and click OK

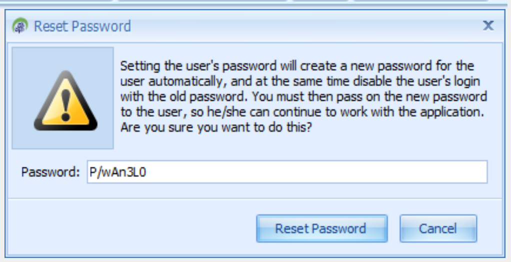


7. Click Save.

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**



9. Either record the predefined password OR clear the existing password and enter a desired password. Click **Reset Password**.



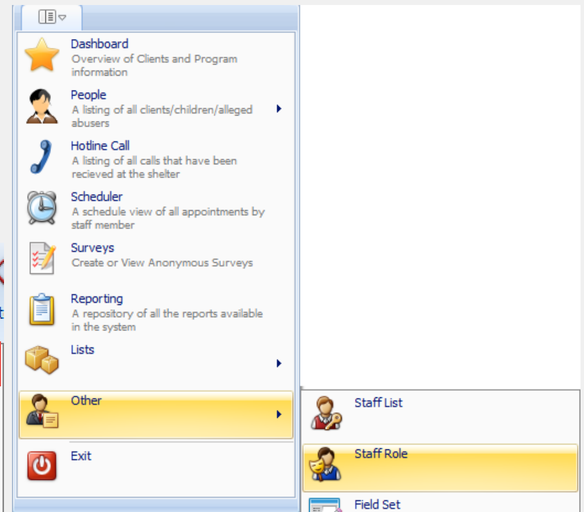
10. Now that the Reset Password has been performed, the software will automatically check **Change Password On First Login**. Save and Close to complete the new Staff Member.

    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.

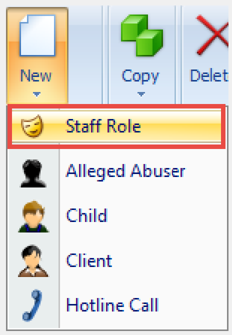
Note: This created a Staff member with the default Model File (customization look and feel). Please see how to **Pull or Push Model File** if the first login of this Staff DOES NOT look like the Administrator Model File.

Creating a New Staff Role

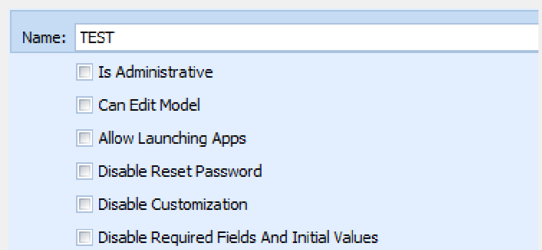
1. From the Navigation menu select **Staff > Staff Role**



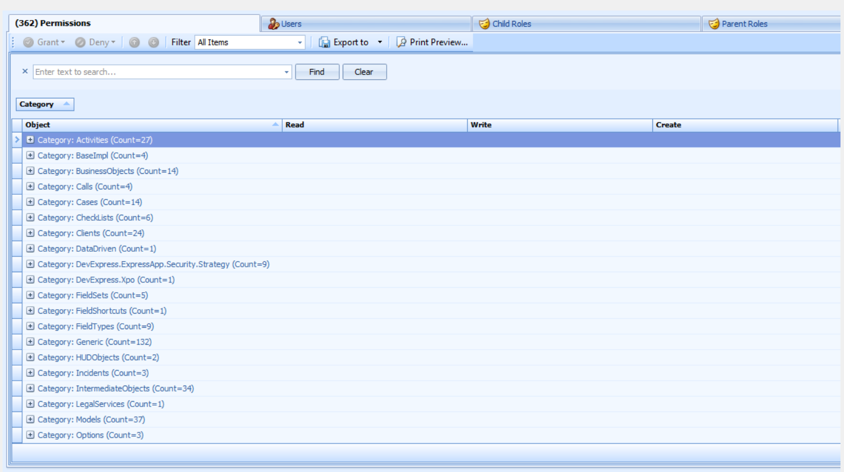
2. In the Ribbon select **New > Staff Role**



3. **Name** the Role
4. Select the appropriate **check boxes**



5. Select the desired **Permissions**



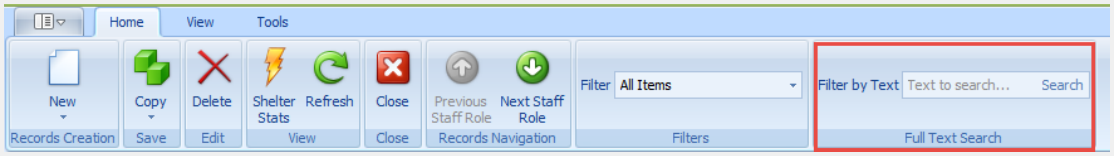
6. **Save and Close**

Filtering in a List View

Within the software, there are many ways to filter information on List View (grid of information). These types of filtering will allow the user to quickly filter the information as the fly or setup permanent filters that can be applied as needed. Please review the various ways of filter to determine the best solution for various situations.

Full Text Search (Ribbon)

The **Full Text Search** is available in the Ribbon on List Views.



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)

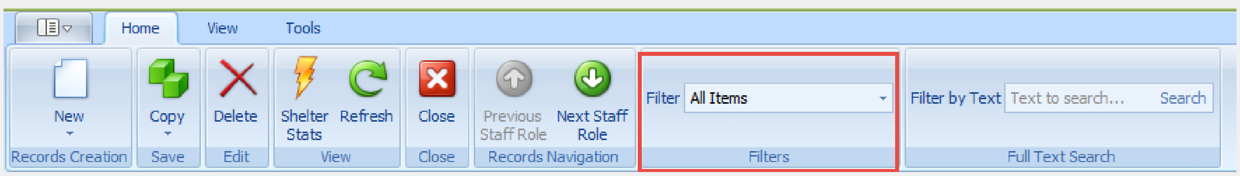
Searching

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

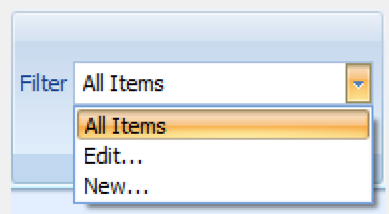
Removing/Clearing search

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.

Filtering



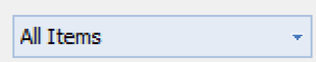
Filtering from the drop down is one of the more advanced areas for filtering. In this area, users are able to create **New** and **Edit** existing filters.



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.

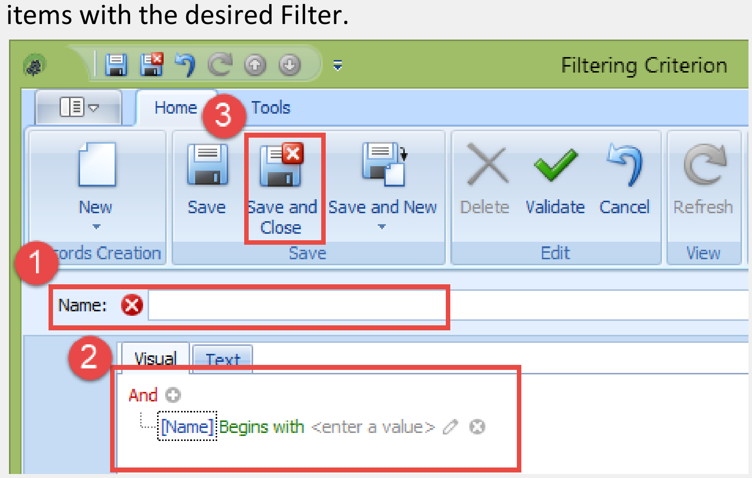


Remove applied Filter

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

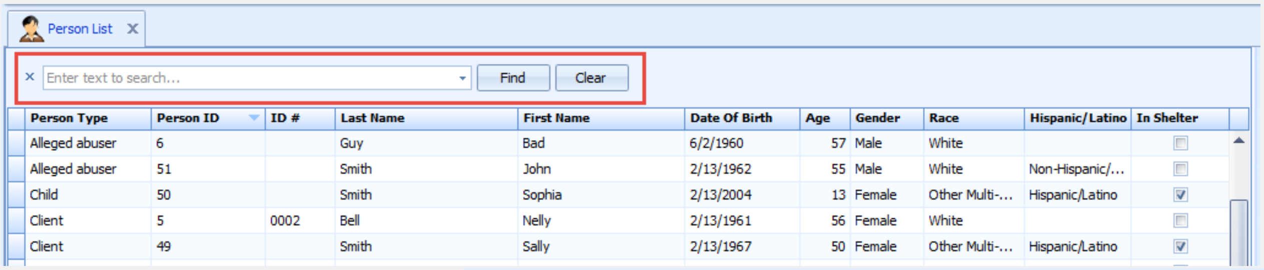
Creating a New Filter

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



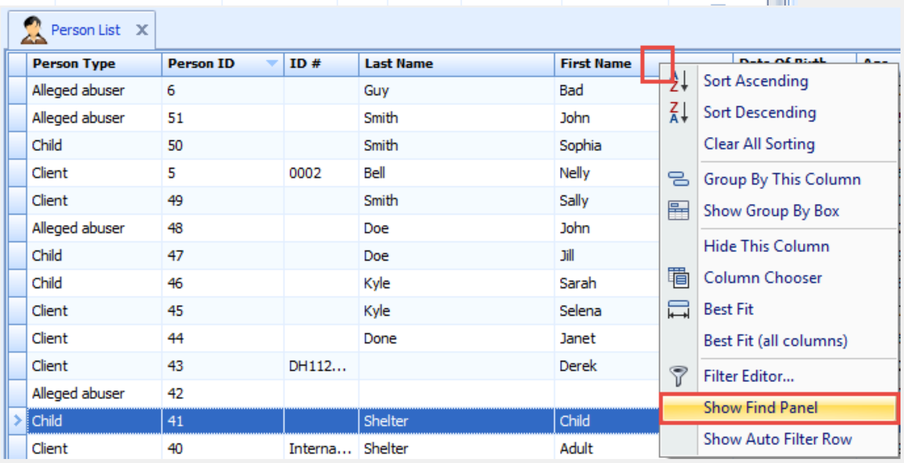
Find Panel

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



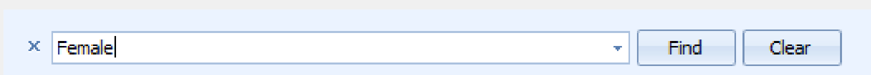
Showing the Find Panel

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



Searching the Find Panel

To search with the Find Panel, enter the de-sire text into the text box.

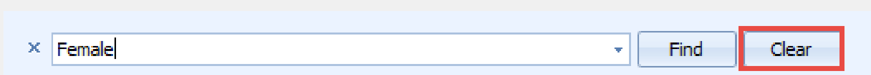


In the example we are searching for "Female"

Removing/Clearing the Find Panel Text

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

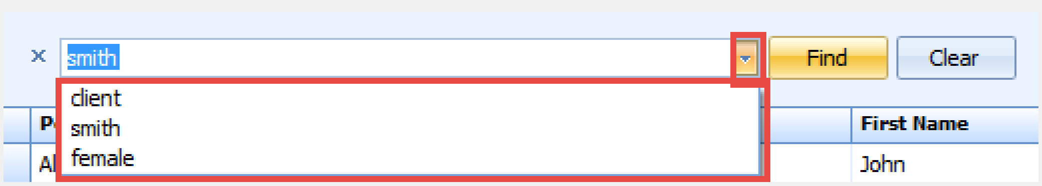
1. Click the **Clear** button on the **Find Panel**, this will remove the text and clear the search



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

Searching with the history in the Find Panel

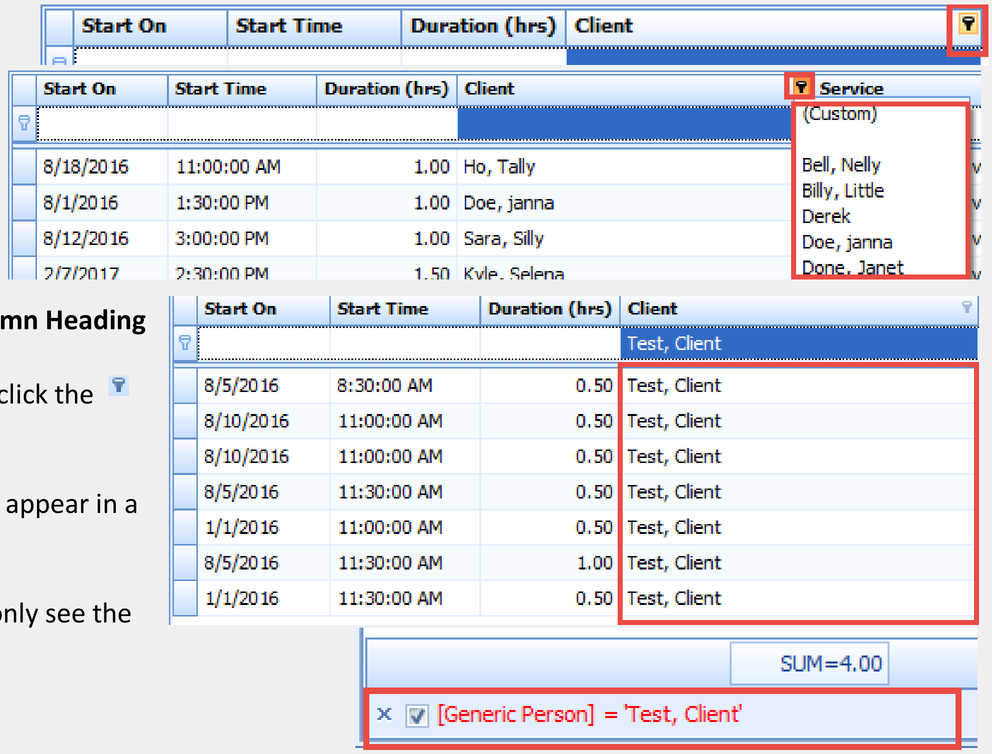
Each search performed with the **Find Panel** will added to a temporary history list that is cleared when the tab is closed



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.



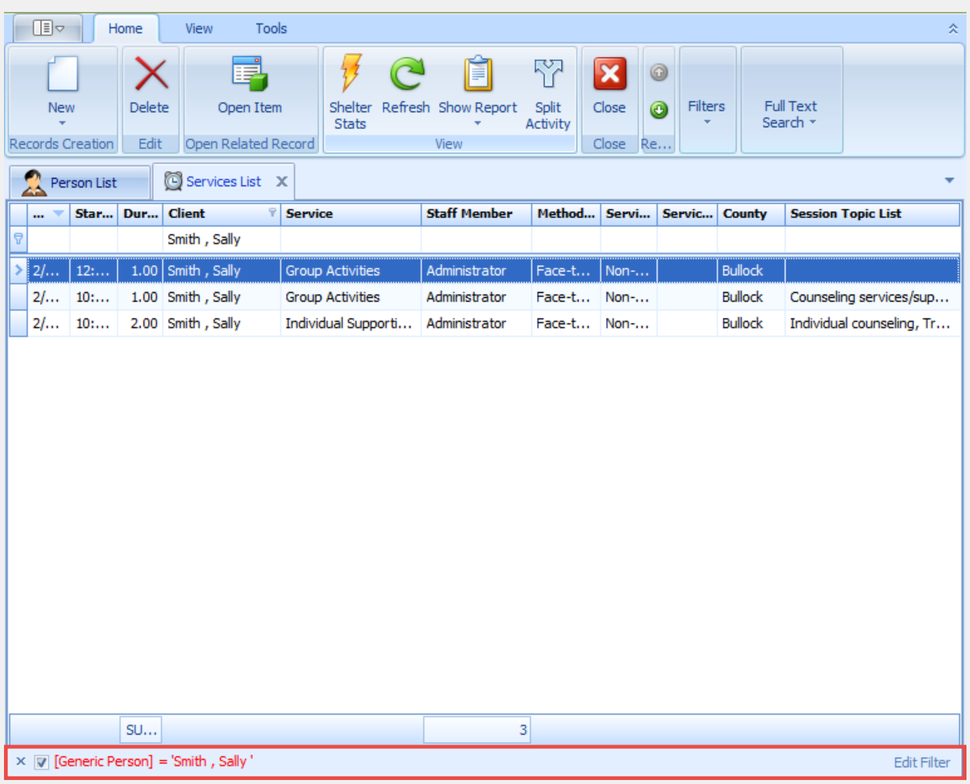
1. Hover the mouse over a **Column Heading**
2. Within the Column Heading, click the (filter icon)
3. The filtering options will now appear in a drop down like control
4. Select one of the options to only see the selected option

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

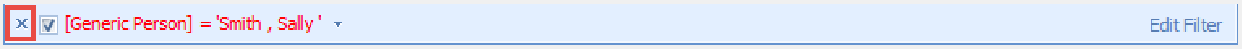
Filtering Summary

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

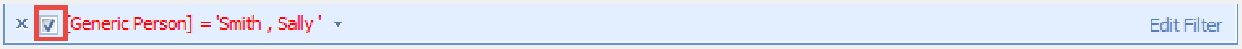
Filtering Summary can be found at the bottom of the screen.



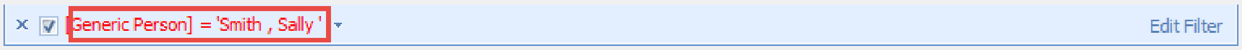
Remove/Delete filtering



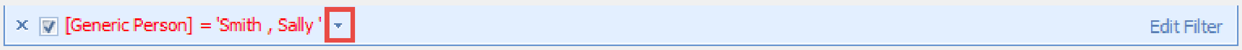
Temporarily Enable or Disable filtering string



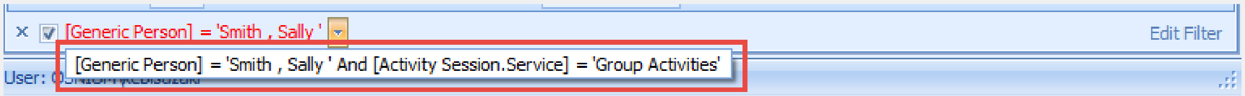
Current Filter (enabled or disabled)



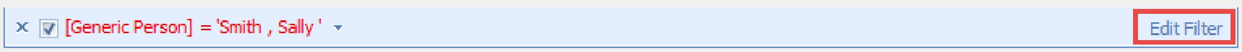
Access Filter history list



Filter history list (from arrow in example above)



Advanced Edit Filter



Initial Value on a Field

What is an Initial Value

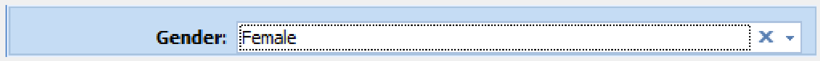
An Initial Value is data that will be automatically entered when creating a new entry

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.

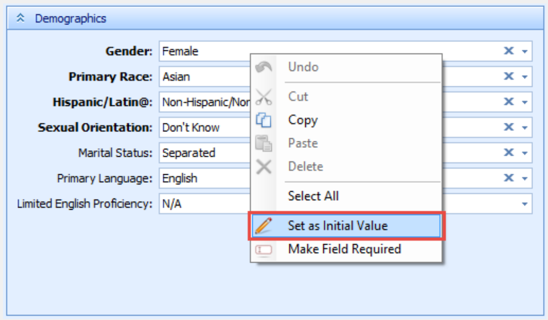
Set Initial Value

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**

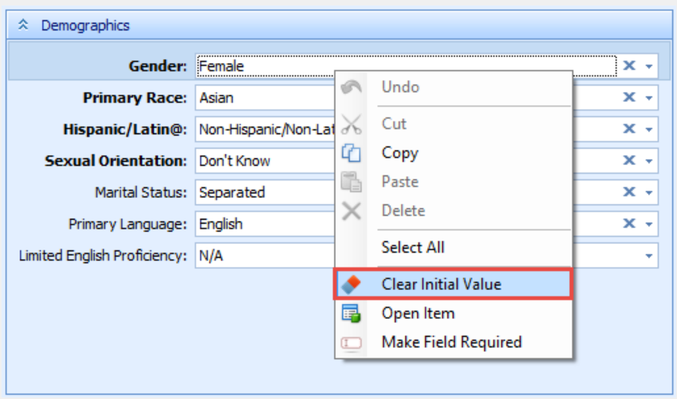


6. Close the Detail View (Save as needed), create a new record to confirm **Set As Initial Value**

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**

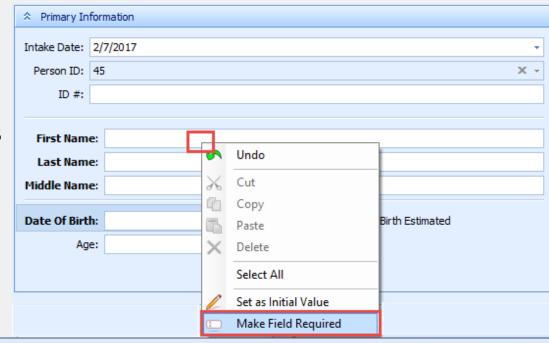


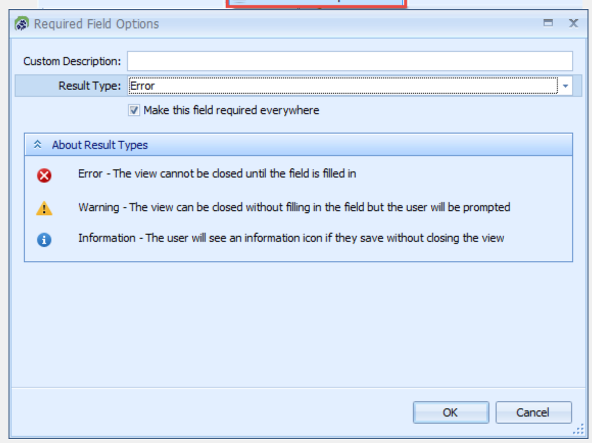
Required Fields

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).



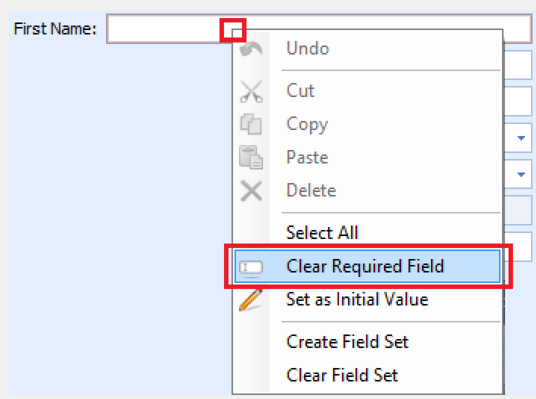


Make a Required Field

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
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)

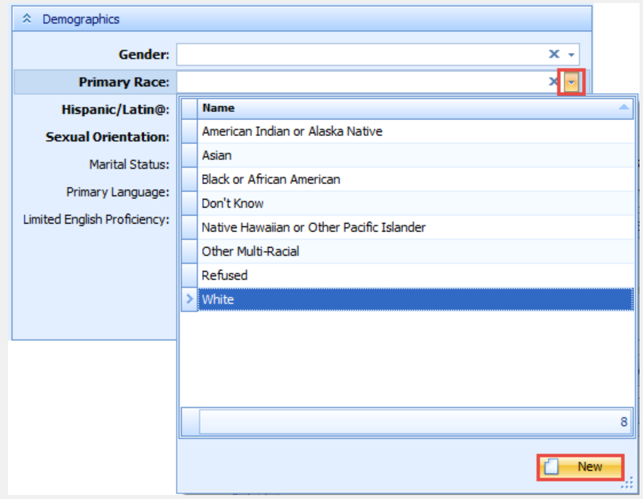


Clear Required Field

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**

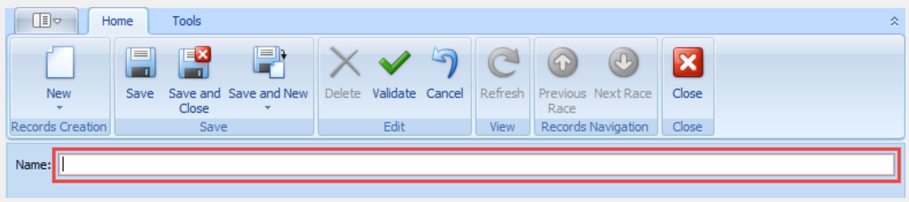
Modifying/Adding drop down options

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

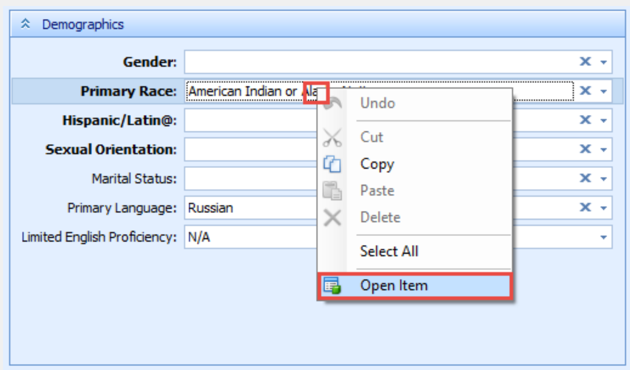


Adding a New Drop Down Value

1. Select the arrow next to the desired drop down and Click New
2. Enter Name for New drop down

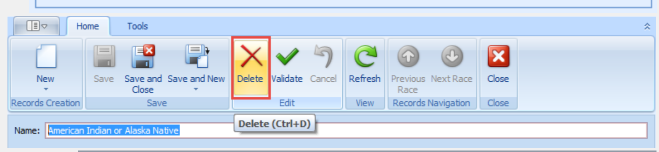


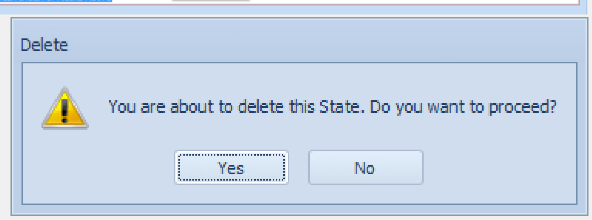
3. Save and Close



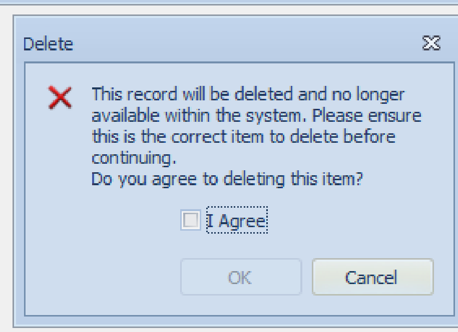
Deleting a Drop Down Value

1. Select the desired drop down that you wish to delete
2. Right Click on the field and select Open Item
3. Click Delete
4. Click Yes





5. Select I Agree and Click OK



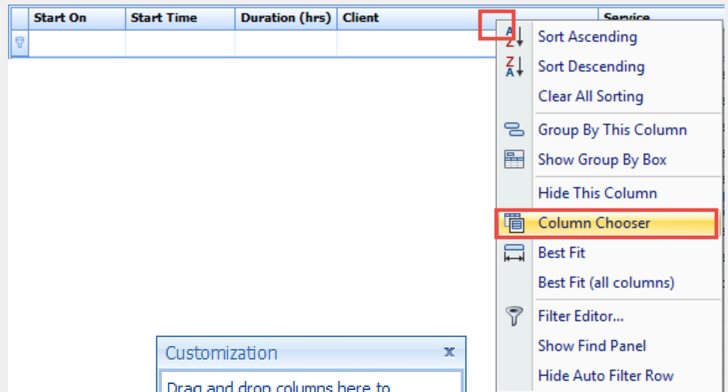
6. Save the entire Record to update the changes.

Column Chooser

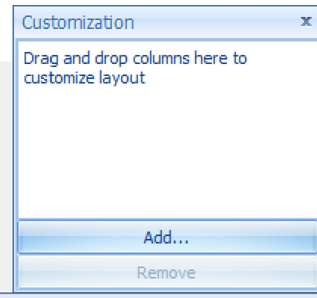
The Column Chooser allows you to choose which columns you would like in a table in a list view.

Adding Columns to a List View

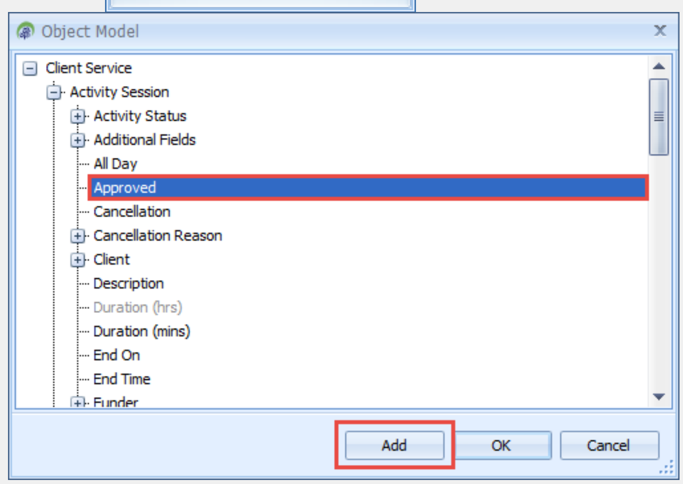
1. Right Click on a header in a list view and select Column Chooser



2. This will make the **Customization** window visible for the List View

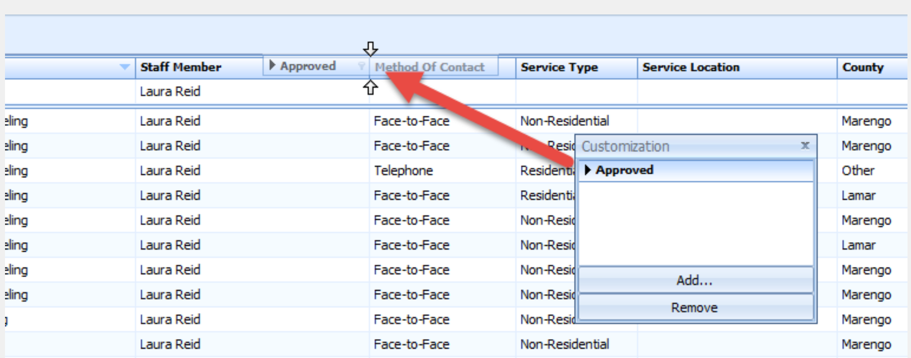


3. **Select Add**
   The **Add** button is where you can access the Object Model; to add fields into the **Fields ready to be added to Form**.
4. Click the + to see a full list of options
5. Select the desired value and select Add

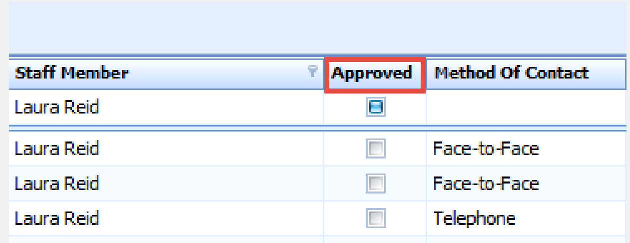


6. Select the desired value with your mouse and hold the mouse down while you drag the value to the correct spot in the column header. Release the mouse to drop the value into the header. The two arrows on the List View Columns will show where the field will be placed when the mouse button is released.

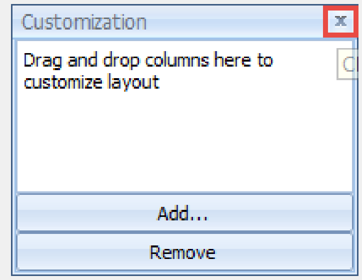
   Alternatively, double click the value and it will be automatically added to the end of the list.



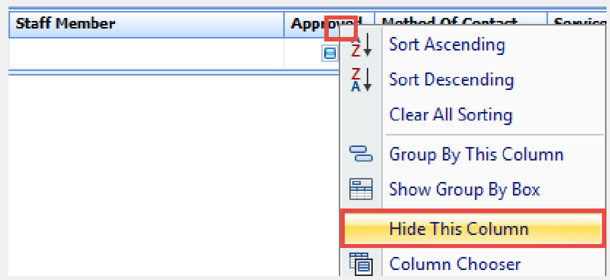
7. The value will now be present as a column



8. Click the X to exit the Customization Window. Your changes will be saved automatically.



Repeat the above steps until all the desired fields are customized onto the List View.

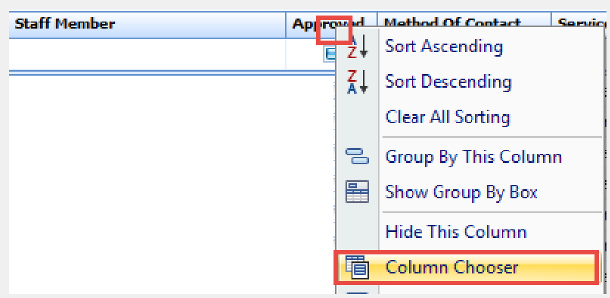


Hiding Columns from a List View

There are two options to remove a column from a List View

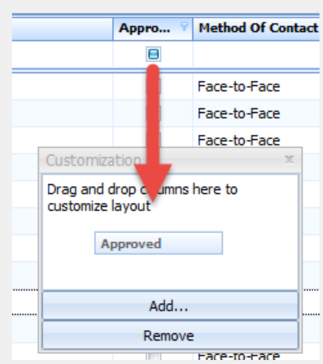
Option 1

1. Right click on the **Column Heading**
2. Select **Hide This Column**
   The Customization window does not need to be visible/enabled for this task

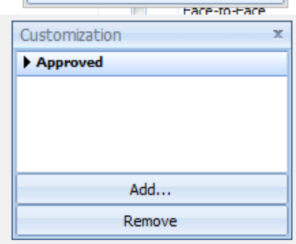


Option 2

1. Right click on the Column Heading
2. Select Column Chooser



3. Click and hold the column you wish to remove, drag it to the Customization window
4. Click X to exit the Customization Window. Your changes will be saved automatically.



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
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/...	☑
Client	1		Test	Client	4/16/1956	61		White	Hispanic/Latino	☑
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/...	☑
Child	50		Smith	Sophia	2/13/2004	13	Female	Other Multi-...	Hispanic/Latino	☑

First Name Sorted Ascending (A-Z)

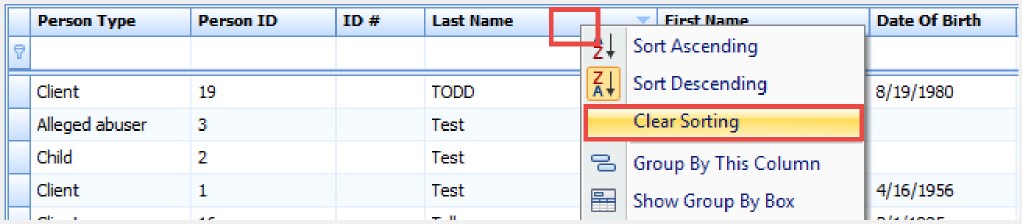
Person Type	Person ID	ID #	Last Name	First Name	Date Of Birth	Age	Gender	Race	Hispanic/Latino	In Shelter
Alleged abuser	27		House	Abuser	8/26/1968	49	Male	Don't Know		☐
Alleged abuser	3		Test	Abuser		0				☐
Client	40	Interna...	Shelter	Adult	10/8/1968	49	Female	Black or Afri...		☐
Alleged abuser	6		Guy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

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
Client	19		TODD	TONY	8/19/1980	37	Female	Asian		☐
Alleged abuser	3		Test	Abuser		0				☐
Child	2		Test	Child		0				☑
Client	1		Test	Client	4/16/1956	61		White	Hispanic/Latino	☑
Client	16		Tall	Walking	2/1/1985	32	Female	American In...		☑
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	☑
Child	50		Smith	Sophia	2/13/2004	13	Female	Other Multi-...	Hispanic/Latino	☑
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**

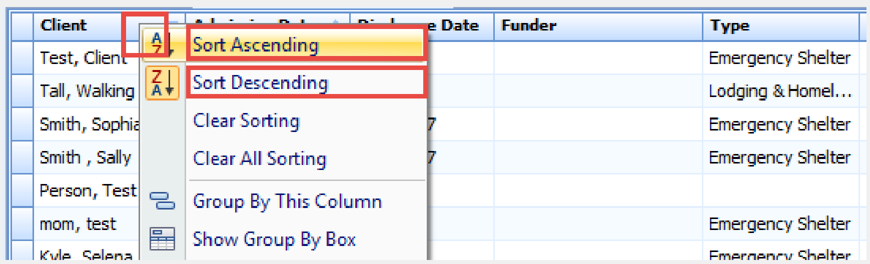


Sort by one Field

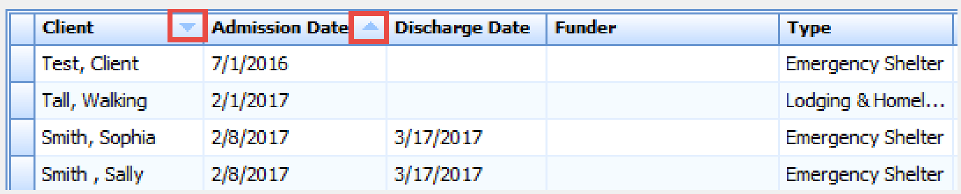
To sort by one field (and remove all previous sorting), locate and **click** on an existing **Column Heading Click one time** to sort Ascending (A-Z); **click a second time** on the same column heading to reverse the sort order to Descending (Z-A).

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.



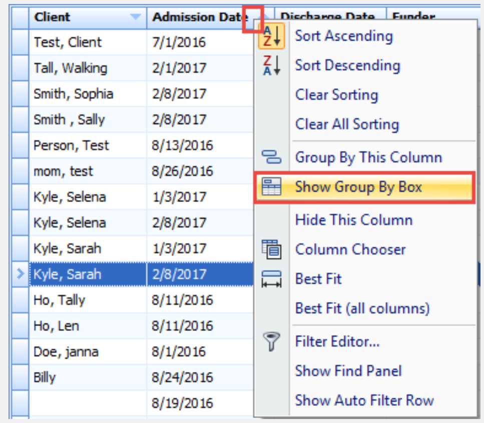
Client	Admission Date	Discharge Date	Funder	Type
Test, Client	7/1/2016			Emergency Shelter
Tall, Walking	2/1/2017			Lodging & Homel...
Smith, Sophia	2/8/2017	3/17/2017		Emergency Shelter
Smith , Sally	2/8/2017	3/17/2017		Emergency Shelter

Group by Box

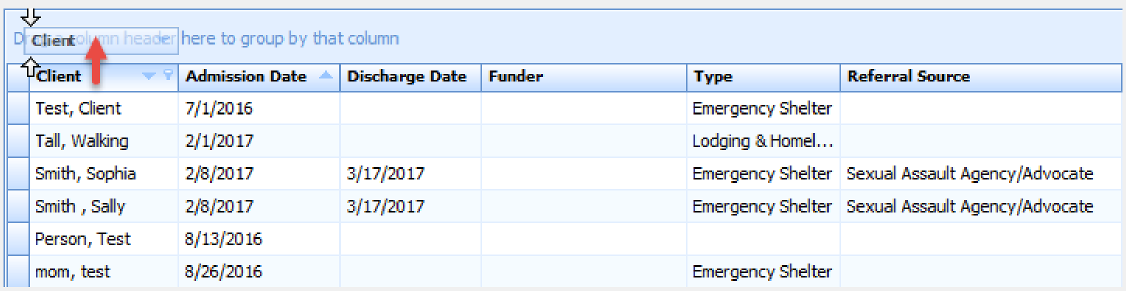
Grouping is a feature in the software where the user can group common information, allowing an enhanced visual understanding of the information

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

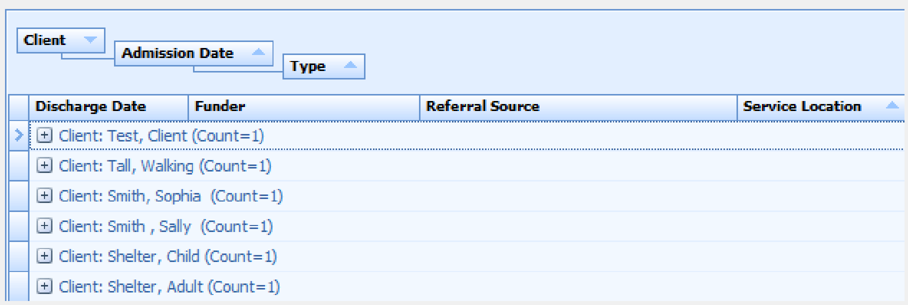
1. Right click on a **Column Heading**
2. Select **Show Group By Box**,



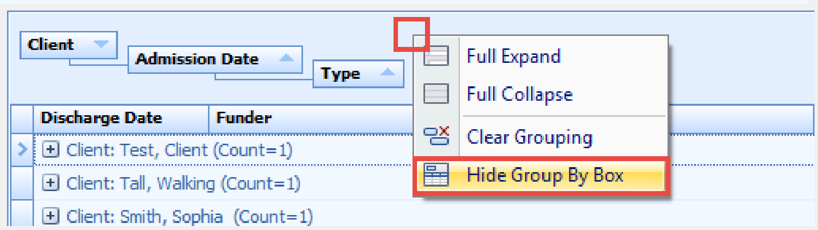
3. Now that the **Group By Box** is visible, drag and drop the heading column into the group by box area



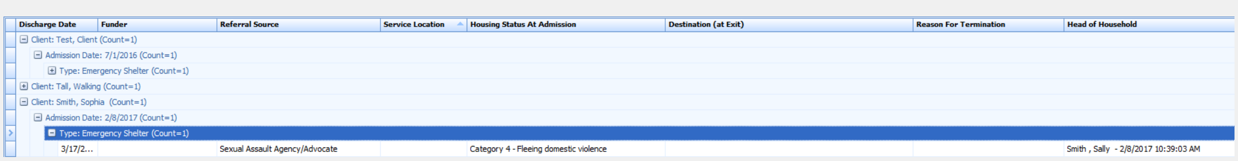
4. Drag and drop various headers as needed. The Group by Box area will show a waterfall type display of groupings that are applied



5. 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

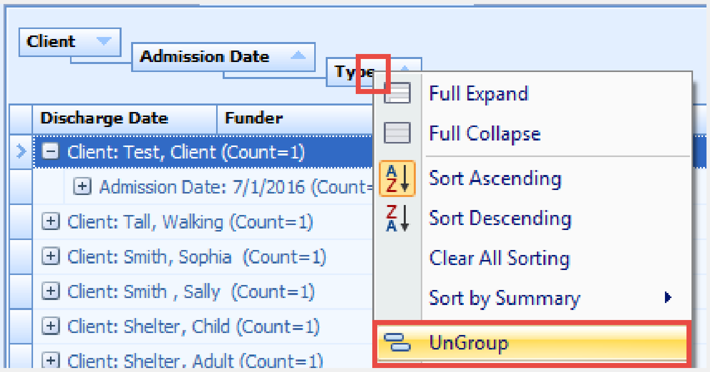


6. The list view will now show the desired grouping



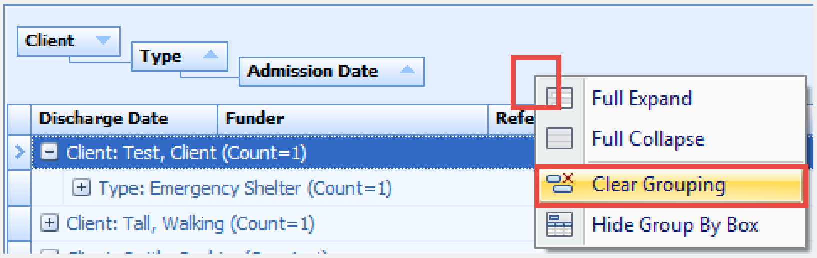
Ungroup specific field

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



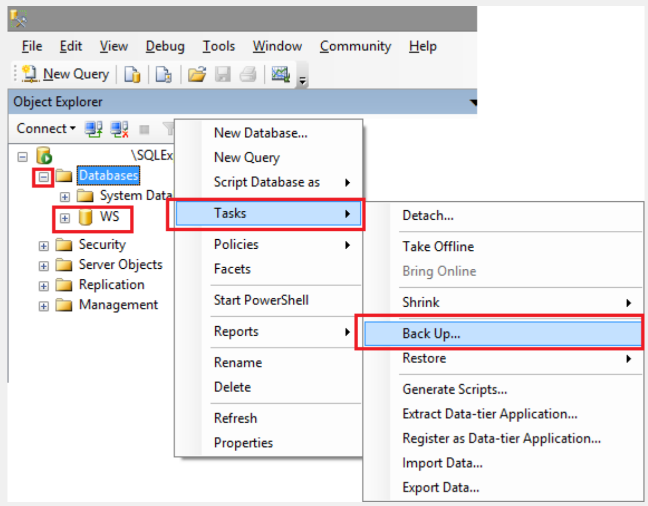
Backup a SQL Database to a file

1. Open Start Menu > Microsoft SQL Server 2008 R2 > SQL Server Management Studio

2. Connect to the appropriate instance of the Microsoft SQL Server Database Engine, in Object Explorer; click the server name to expand the server tree.

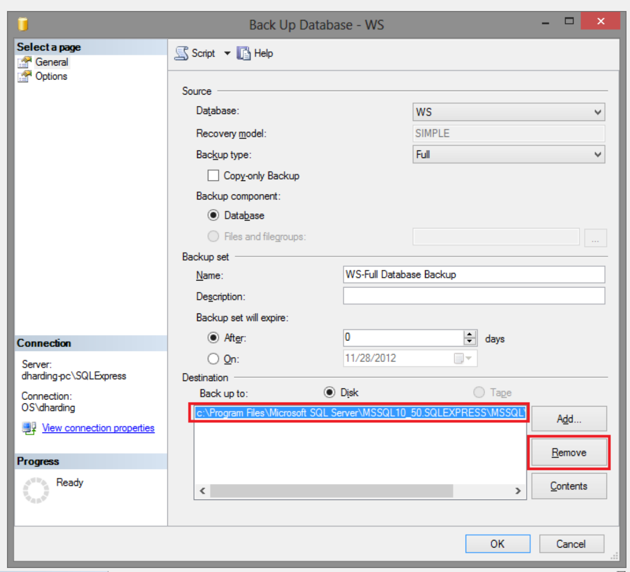
3. Connect to the Server

   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**)

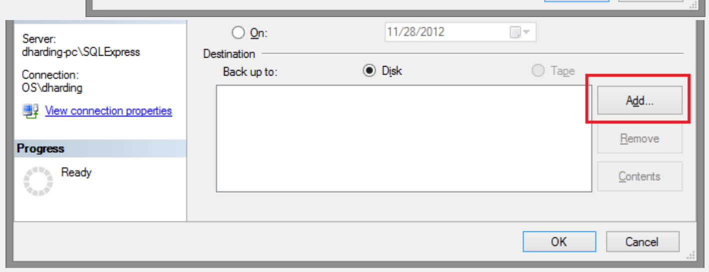


4. Expand Databases

5. Right Click on the database to backup, Tasks > Back Up…



6. Remove any existing backups path (as they are not needed or would “double” backup if using the same one over and over)
   (before)
   (after)

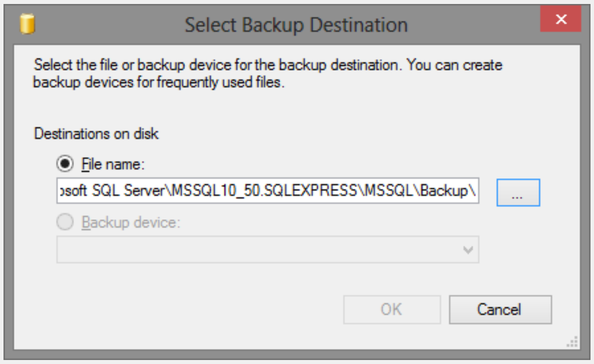


7. Select the Disk option and then Click Add (to create a database *.bak file in a specific location)

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



   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

2. Open Start Menu > Microsoft SQL Server 2008 R2 > SQL Server Management Studio

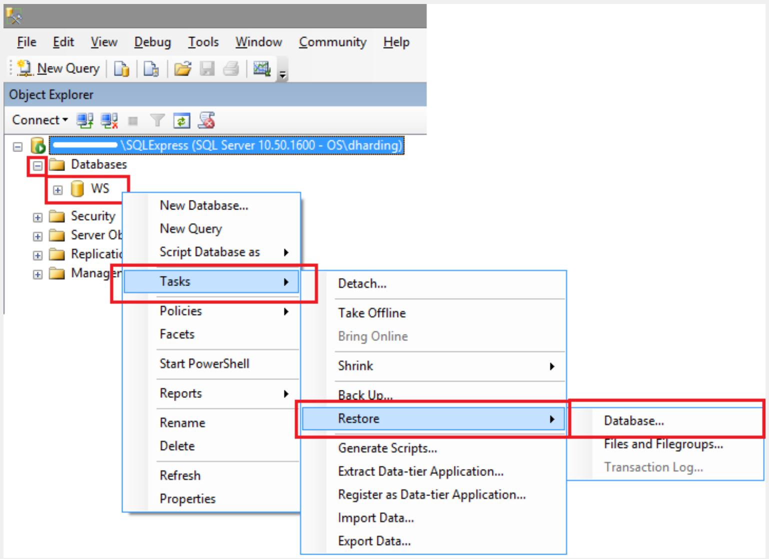
3. Connect to the appropriate instance of the Microsoft SQL Server Database Engine, in Object Explorer; click the server name to expand the server tree.

4. Connect to the Server

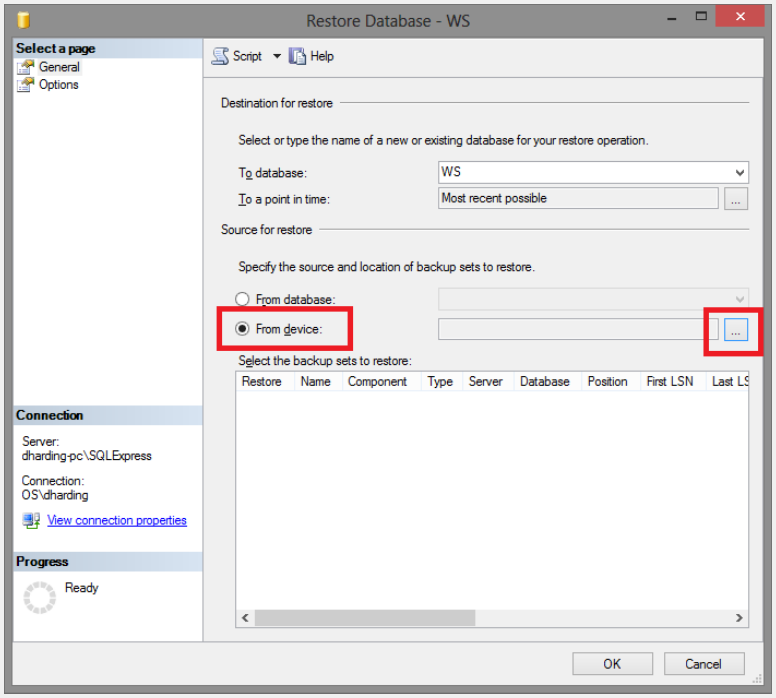
   Note: You may need to select Authentication: **SQL Server Authentication** and the Enter your username and password (This was created when you installed SQL Server. It may be User name**: SA** and password**: osniumws**)

5. Expand Databases

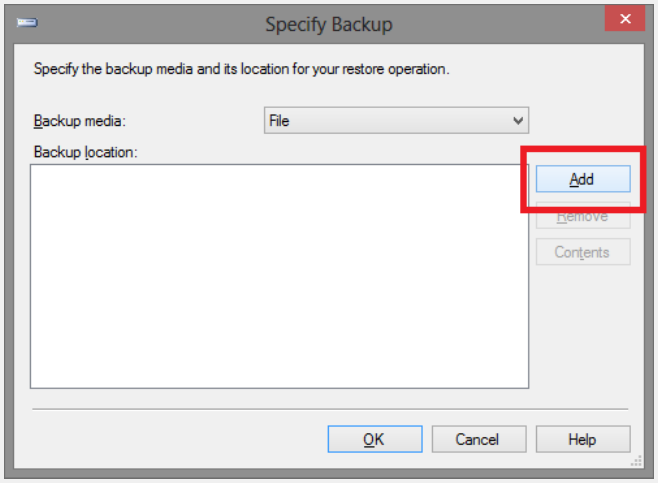
6. Right-click the database (if already exists), Tasks > Restore > Database…



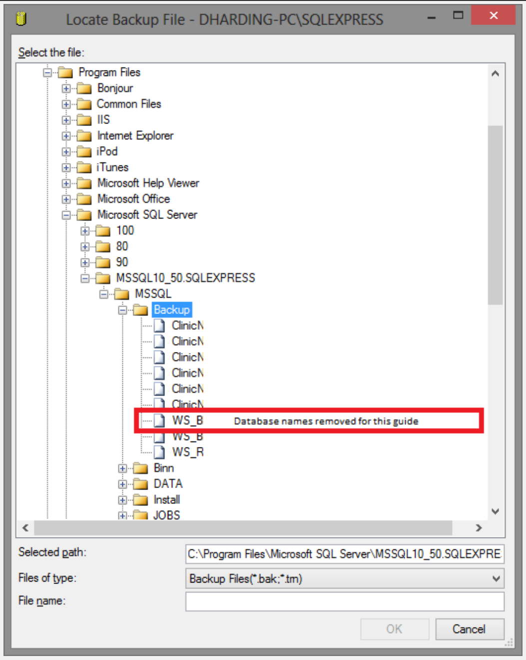
7. On the General page, select From device: Click the browse button (ie …)



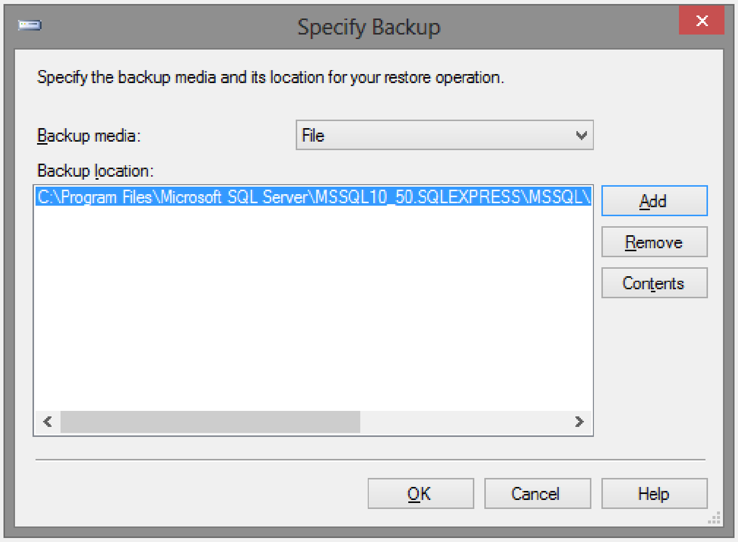
8. Now the Specify Backup dialog box is visible. Click Add



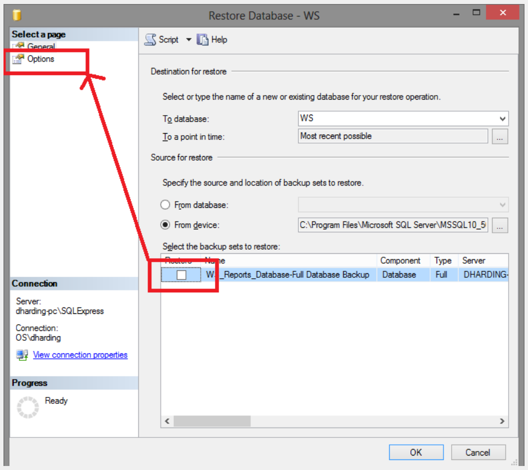
9. After you add the downloaded database to the list (extract if needed), click OK to return to the General page



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

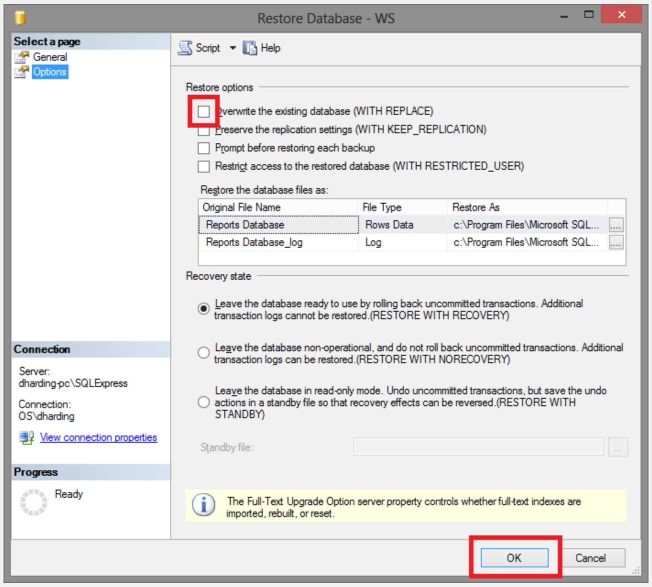


10. In the Select the backup sets to restore grid, select the backups to restore by the check box beside it (this should only be one). This grid displays the backups available for the specified location.

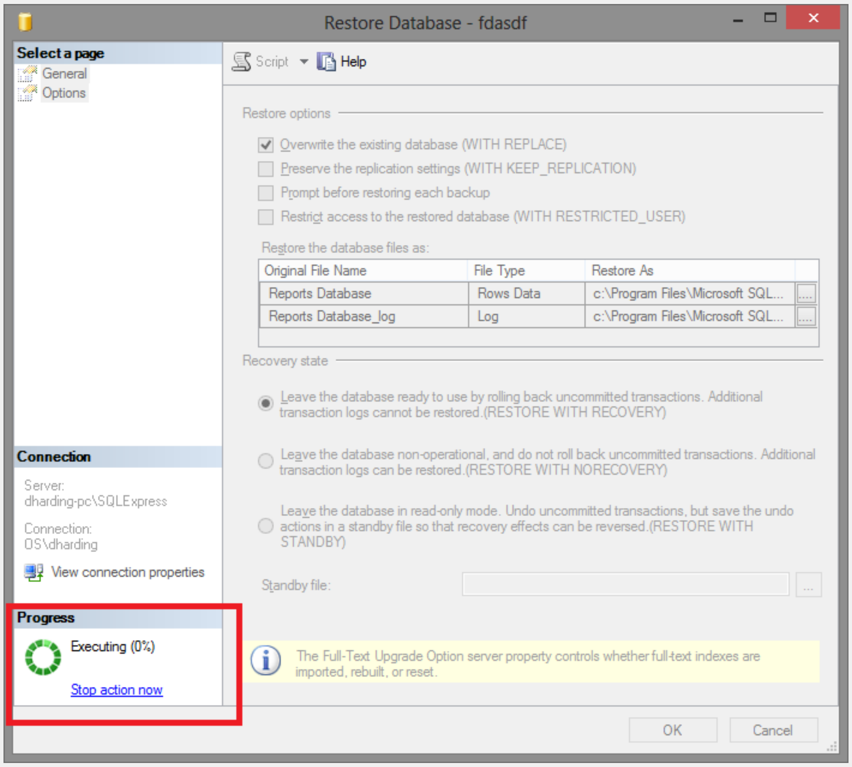


11. Click Options in the Select a page pane

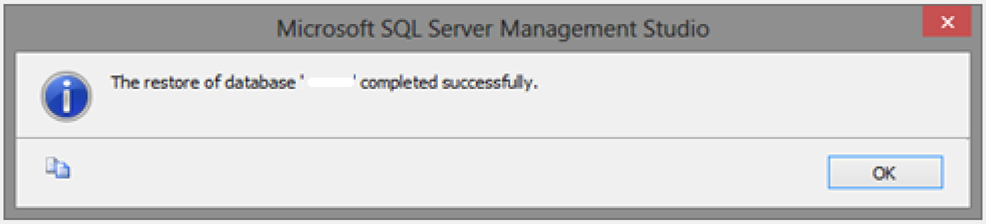
12. In the Restore options panel, you can choose any of the following options, if appropriate (for your situation and most other situations): Check **Overwrite the existing database**



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

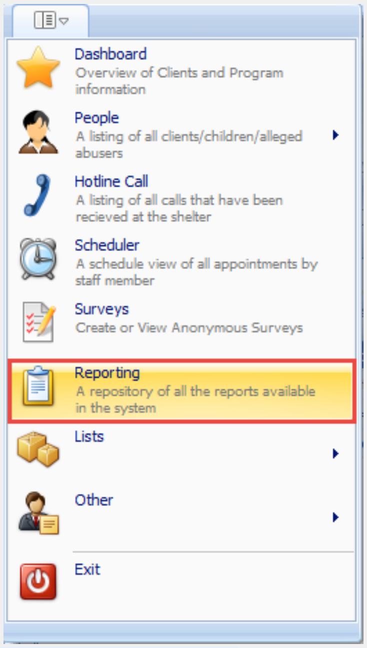
Generic Reports display data related to various administrative tasks, as well as data not directly associated with a specific database object. For example, the Service Report can gather all the details of the Services during a given date range, then it can be filtered by the various parameters in the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

Funder Reports

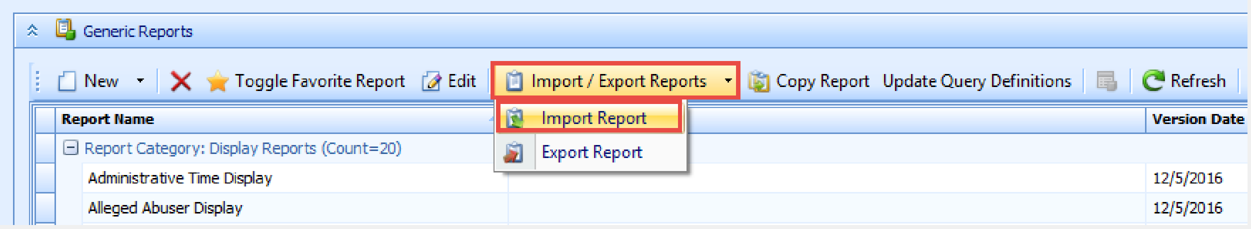
Funder Reports display data in a format similar to the state or federal Funder reports.

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.



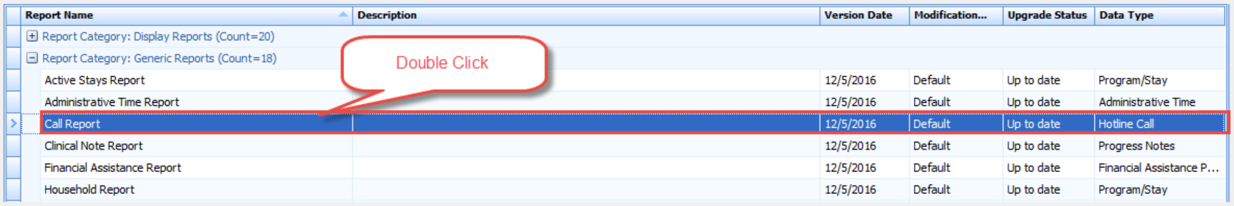
3. Locate the reports that you wish to import and select them. If you're importing one report, you can click on it then hit the "Open" button. If you're importing multiple reports, you can press and hold the left mouse button to select multiple reports, then hit the "Open" button.

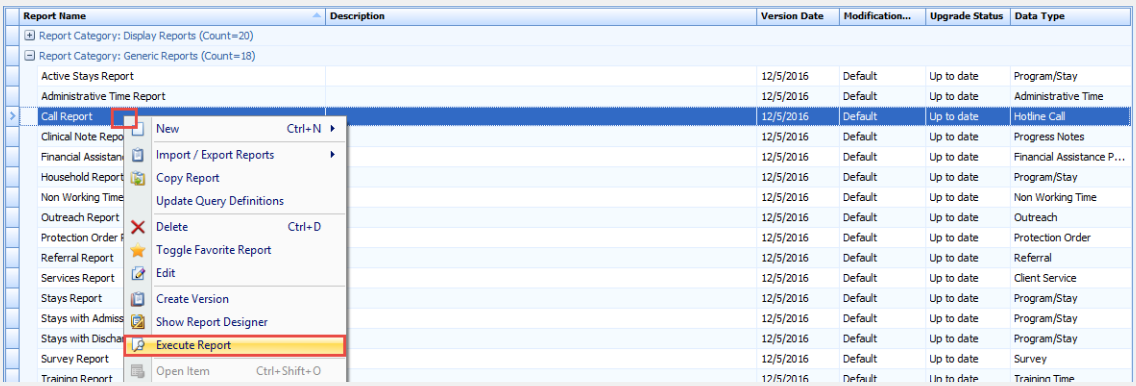
Please Note: only *.repx files can be imported

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

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.





Filtering Reports

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

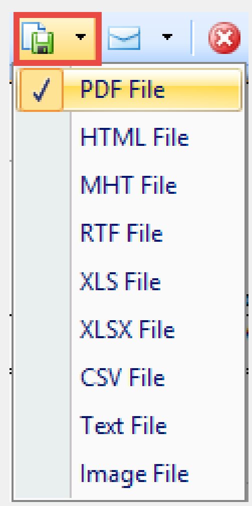
Use the drop-downs to adjust the filters in the Parameters section to highlight the information desired. The filters available will vary depending on the type of report being accessed.

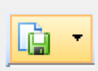
Click **Submit** to run the report with the selected filters.

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

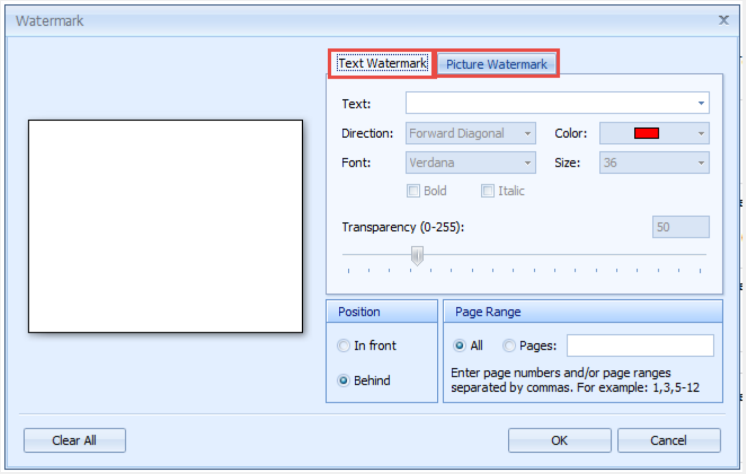
After running a report, click the email icon . This will take you through the steps of saving the report as a PDF.

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.



To add a watermark after running a report, click the watermark icon to open the Watermark 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

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

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

Click the Page Setup icon to access options for adjusting the report’s layout (paper size, orientation, margins).