# Navigating the System OSOS Guide

Contents

PURPOSE

This guide is intended to familiarize users of the One-Stop Operating System (OSOS) with the structural layout of OSOS, as well as explain how to navigate between the various screens. It is intended for new staff or users with little to no experience using OSOS.

OSOS STRUCTURE

OSOS is organized by a structure of modules, windows and tabs – similar to a series of folders and subfolders. Each module contains a set of windows, and each window has a corresponding row of tabs. Screens you view in OSOS are displayed on the tab of a window in a module. In the screenshot example below, the information displayed is from the **Gen. Info** tab of the **Customer Detail** window in the **Customer** module.
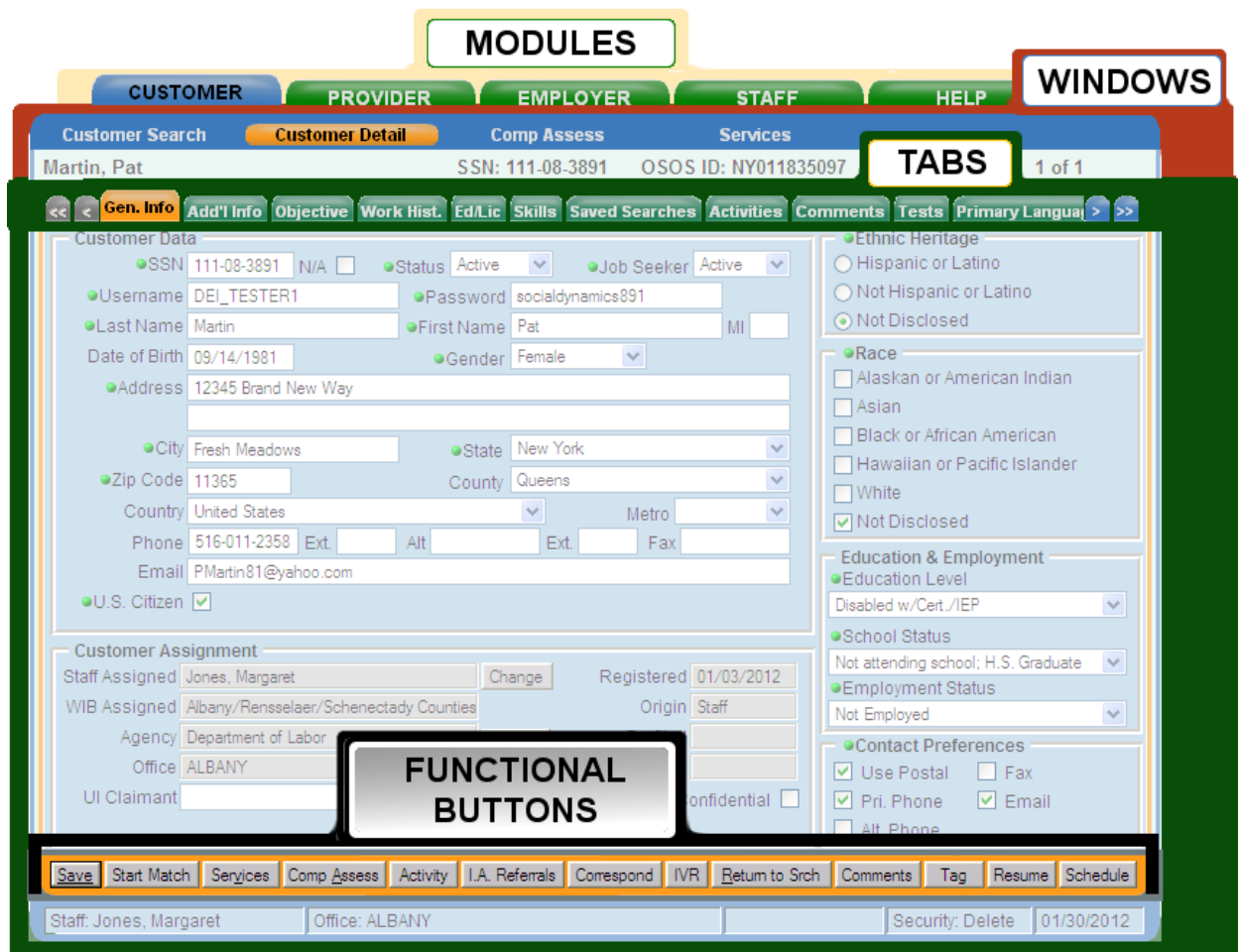
This section of the guide will go over each of these features and review the information in the OSOS status bar. It will also explain the different ways of navigating between windows in OSOS.

MODULES

| CUSTOMER | PROVIDER | EMPLOYER | STAFF | HELP |

OSOS is organized into five separate modules: **Customer**, **Provider**, **Employer**, **Staff** and **Help**. You can navigate between modules by clicking on the module headers at the top of the screen, and the currently selected module displays in blue with black text. In this example, the **Customer** module is selected.

WINDOWS

| Customer Search | Customer Detail | Comp Assess | Services | Links | JobZone |
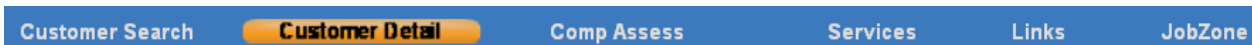
Within a selected module, there are various windows which display in the window bar beneath the module headers. In the example above, the **Customer** module has been selected and the window bar displays the six windows in this module: **Customer Search**, **Customer Detail**, **Comp Assess**, **Services, Links** and **JobZone**. The currently selected window is highlighted in orange with black text. In this example, the **Customer Detail** window is selected.

TABS

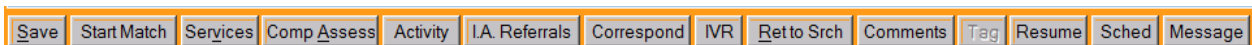| << | < | Gen. Info | Add1 Info | Pgms/PA | Objective | Work Hist. | Ed/Lic | Skills | Saved Searches | Activities | Comments | Tests | Pr | > | >> |

Each window contains multiple tabs. The currently selected tab is also highlighted in orange with black text. When a tab is selected, data can be entered into its active fields. In this example, the **Gen. Info** tab is selected.

Use the arrows at the ends of the bars to access additional tabs that are not currently visible. The single arrow navigates one tab at a time, while the double arrow jumps to the end.
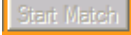
If a tab is grayed out, this means that you do not have the required OSOS permission level to view that tab. You will need to speak with your supervisor to see if your job requires added permissions to your OSOS account.

FUNCTIONAL BUTTONS

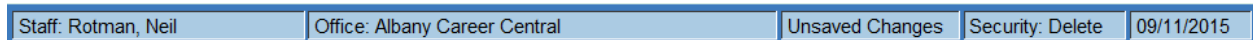| Save | Start Match | Services | Comp Assess | Activity | I.A. Referrals | Correspond | IVR | Ret to Srch | Comments | Tag | Resume | Sched | Message |

At the bottom of the screen, there is a row of buttons, which can be used to perform various functions in OSOS, including navigating to other screens, scheduling customer appointments and recording activities and comments.

If any buttons in OSOS appear grayed out like this, you [Start Match] *cannot perform the related function. Possible reasons for this include the following: you do not have the required permission; data on the screen or record inactivates the button; or other data must be entered on the screen or record to activate the button.*

STATUS BAR

Beneath the row of buttons, there is a status bar at the bottom of the screen.

| Staff: Rotman, Neil	Office: Albany Career Central	Unsaved Changes	Security: Delete	09/11/2015

From left to right, it displays the following information:

- **Staff:** Displays the name of the staff person logged in to OSOS
- **Office:** The name of the office where the staff person is assigned or has logged into
- **Record changes:** Will display the text *Unsaved Changes* if any unsaved changes were made to the record. If no unsaved changes have been made, this will be blank
- **Security:** Displays the OSOS Permission (security) level of the logged in staff person
- **Date:** Displays the current date

OSOS DATA ENTRY

NAVIGATING BETWEEN WINDOWS
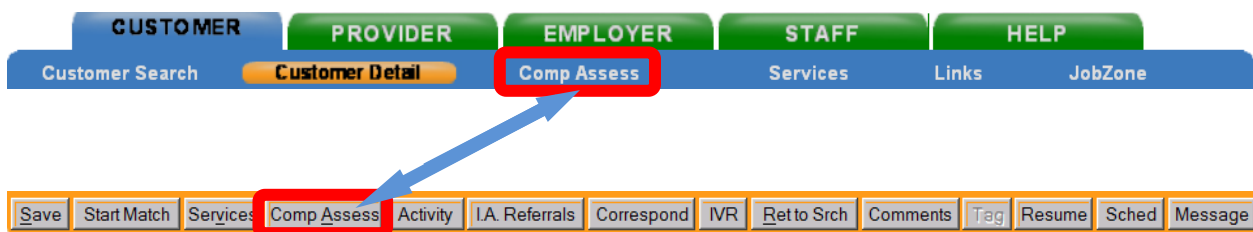
While you are in the **Customer Detail**, **Comp Assess** or **Services** windows, you will see that you have the option to navigate to the other windows by clicking on the window name in the window bar or on the corresponding functional button at the bottom of the screen. In the above example, the **Customer Detail** window is the current active window, and you can navigate to the **Comp Assess** and **Services** windows by clicking on either name in the window bar or the corresponding button.

It is usually recommended that you use the buttons to navigate between windows. This is because OSOS will refresh the record by resending data to the server and you will be able to see the most current changes made on the record.

Clicking the window names on the window bar will not refresh any data, but will retain the unsaved data temporarily. This method may be preferable if you are only checking information in another window before saving or viewing records that will not need any data entry changes.
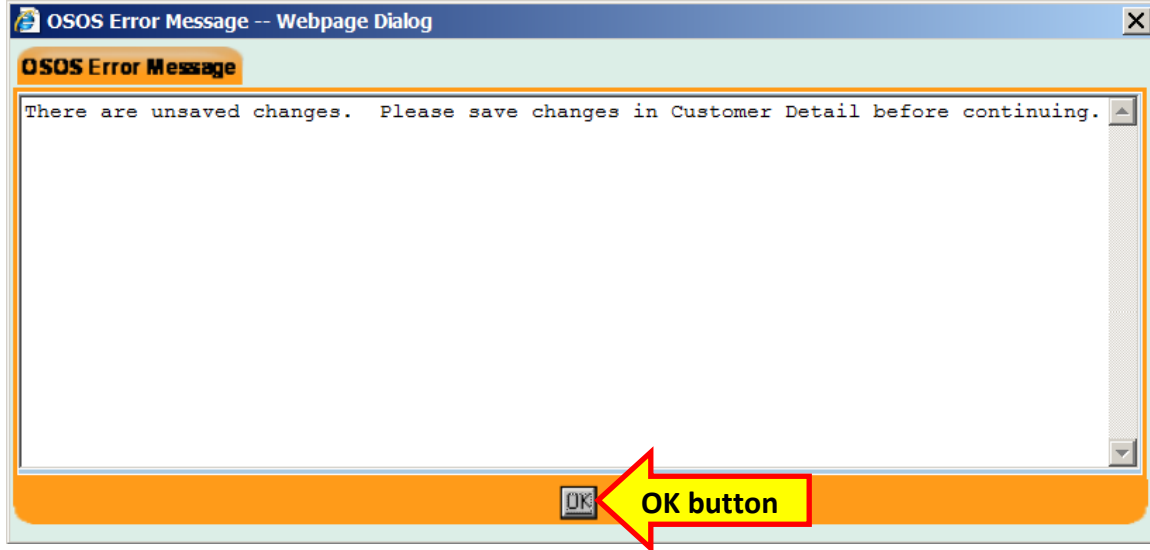
UNSAVED CHANGES

It is recommended that you remember to save any changes you make to a customer record as often as possible. Again, you can see if there are any unsaved changes on the record by checking this on the status bar.

| Staff: Rotman, Neil | Office: Albany Caree | **Record Change** | Unsaved Changes | Security: Delete | 09/11/2015 |

As an additional precaution, anytime you attempt to navigate from one window to another without saving your changes, you will receive a pop-up message indicating that there are unsaved changes. However, this message will be different depending on whether you navigate by clicking on the window names in the window bar or if you use the buttons at the bottom of the screen.

If you use the buttons to navigate to a different window, the pop-up message will indicate that there are unsaved changes and will prompt you to save the changes in the current window before continuing. Click **OK** to dismiss the message.

Save your changes by clicking on the **Save** button.

| Save | Rt Match | Services | Comp Assess | Activity | I.A. Referrals | Correspond | IVR | Return to Srch | Comments | Tag | Resume | Schedule |

Navigating via the buttons will not allow you to move to another window without saving your changes.

If you click on the window names on the window bar to navigate to a different window, the pop-up message will again indicate that there are unsaved changes, but it will give you the option to exit the current window without saving your changes.

To navigate to the new window without saving any changes in the current window, click **OK**.

To save your current changes before navigating to the new window, click **Cancel** and then save your changes by clicking on the **Save** button.
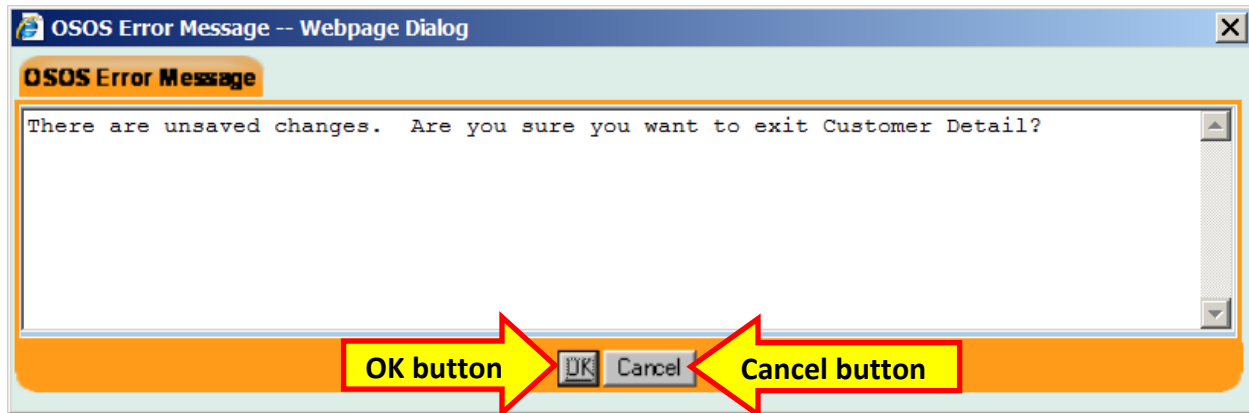
RESOURCES AND ASSISTANCE

Additional program information, OSOS guides and other resources can be found at:
http://labor.ny.gov/workforcenypartners/osos.shtm

For further assistance, please contact the OSOS Help Desk:
By phone: (518) 457-6586
By email: help.osos@labor.ny.gov