Scan. Store. Shred.™

O’Neil Order
Client User Guide

O'Neil Software, Inc.

February 2021

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Navigating O’Neil Order

Overview

Welcome to O’Neil Order, which gives you access and control over your own stored records from any web browser, any time day or night, from anywhere in the world. O’Neil Order allows you to access your record center's database and perform many tasks yourself, eliminating telephone calls and miscommunications.

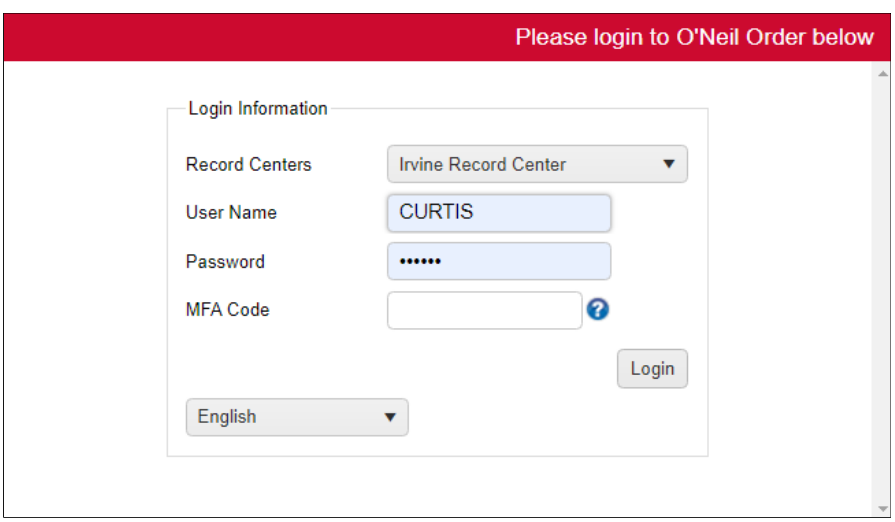
Through O’Neil Order and your Internet connection, you can query the record center database, request pickups or deliveries, check the status of your orders, and update the information associated with your stored items. O’Neil Order’s modern interface provides full text search functionality, robust filtering options, and easy access to critical business information all in real-time.

Access O’Neil Order

O’Neil Order is accessed through your web browser using the URL provided to you by your record center. It is supported in Internet Explorer, Firefox, Chrome, Safari, and Microsoft Edge. Standard browser functions apply while using O’Neil Order.

Log In

Security is important to you and your records. O’Neil Order respects that and requires that everyone who logs in have a current User Name and Password. These names and passwords are set up through your record center.



Record Centers: If you access to more than one database, you can select one here.

User Name/Password: Enter your User Name and Password in the appropriate fields.

Language: If your record center has set up more than one language, you can select one here.

MFA Code: If your record center has set up multi-factor authentication, you will be required to enter an MFA Code. Multi-factor authentication (MFA) is a method of access control in which you are only granted access after presenting two or more different types of authentication. This adds an extra layer of protection on top of your User Name and Password.

O'Neil Order uses the most common type of MFA, which involves generating a verification code (on your smart phone) that you need to input along with your User Name and Password. This requires the use of an authenticating app on your phone.

Google Authenticator

An authenticator app is used on your smart phone to generate the MFA verification code. O'Neil recommends Google Authenticator, although different apps may be used.

Google Authenticator provides a six digit one-time verification code that you need to enter in the O'Neil Order Login screen.

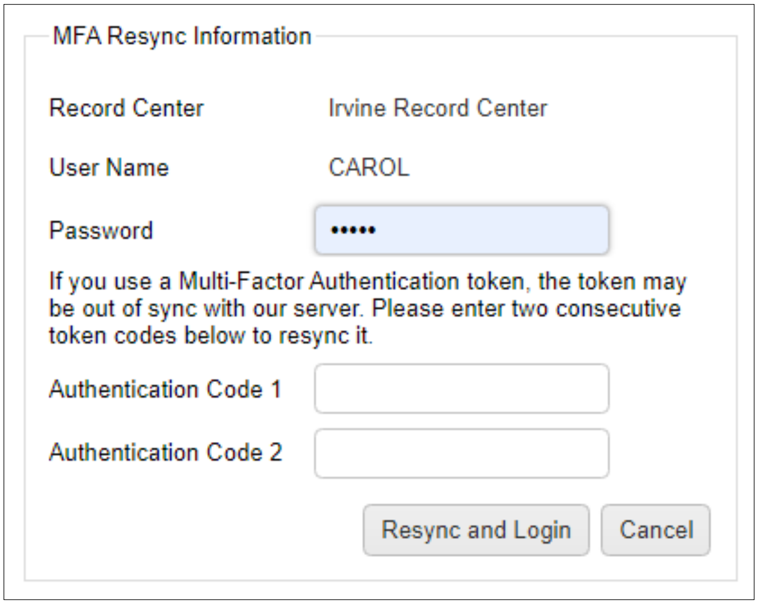
For this to work, a set-up operation has to be performed the first time you log in after enabling MFA. O'Neil Order provides a shared secret key over a secure channel, which is to be stored by the Authenticator app. This secret key will be used for all future logins to O'Neil Order.

In order to break into your account, someone would need to know your User Name and Password and also your shared secret key, or have access to the physical device running the Authenticator app.

The Authenticator app generates a Time-Based One-Time Password (TOTP) every 30 seconds. This code is then entered on the O'Neil Order Login screen. As long as the app is open, it will continue generating these codes, so if you mis-type one, you can wait 30 seconds for the next one to be generated. However, you must log in while the code is still showing. If you type in a code and wait too long before you log in, the login will fail.

Login

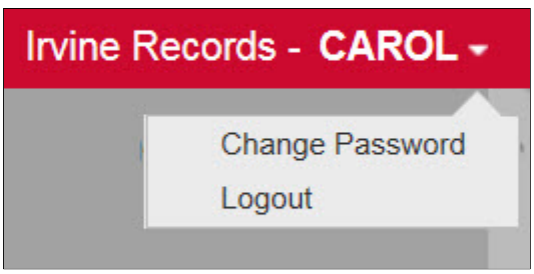
Once MFA has been enabled for your database, if you fail to log in twice for any reason, you will be presented with a **Resync** screen. For Time-Based One-Time Password (TOTP) authentication to function correctly, the time on the O'Neil Order server and the time on the smart phone running the Authenticator app must stay in sync relative to each other. For this reason, if you fail to log in twice, the **Resync** screen is displayed and requires two consecutive codes so the time difference between the server and the phone can be determined. You may click **Cancel** and return to the **Login** screen to try to log in again, but if you fail to log in twice because your phone is out of sync, you will once again be returned to the **Resync** screen.



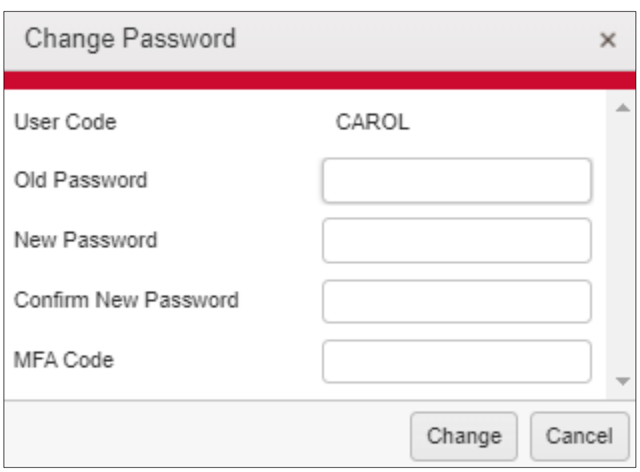
Enter your password and two consecutive Authentication Codes. Click **Resync and Login**.

Change Password

To change your password at any time, click the down arrow next to your user name in the top right corner of the screen and select **Change Password**.



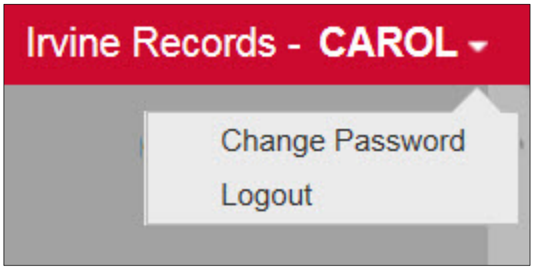
The **Change Password** dialog box appears.



Complete the fields and click **Change**.

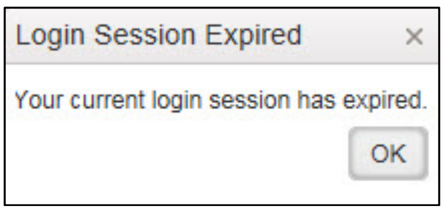
Log Out

When you have finished using O'Neil Order, you should always log out. Click the drop down arrow next to your user name in the top right corner of the screen and select **Logout**.



Time Out

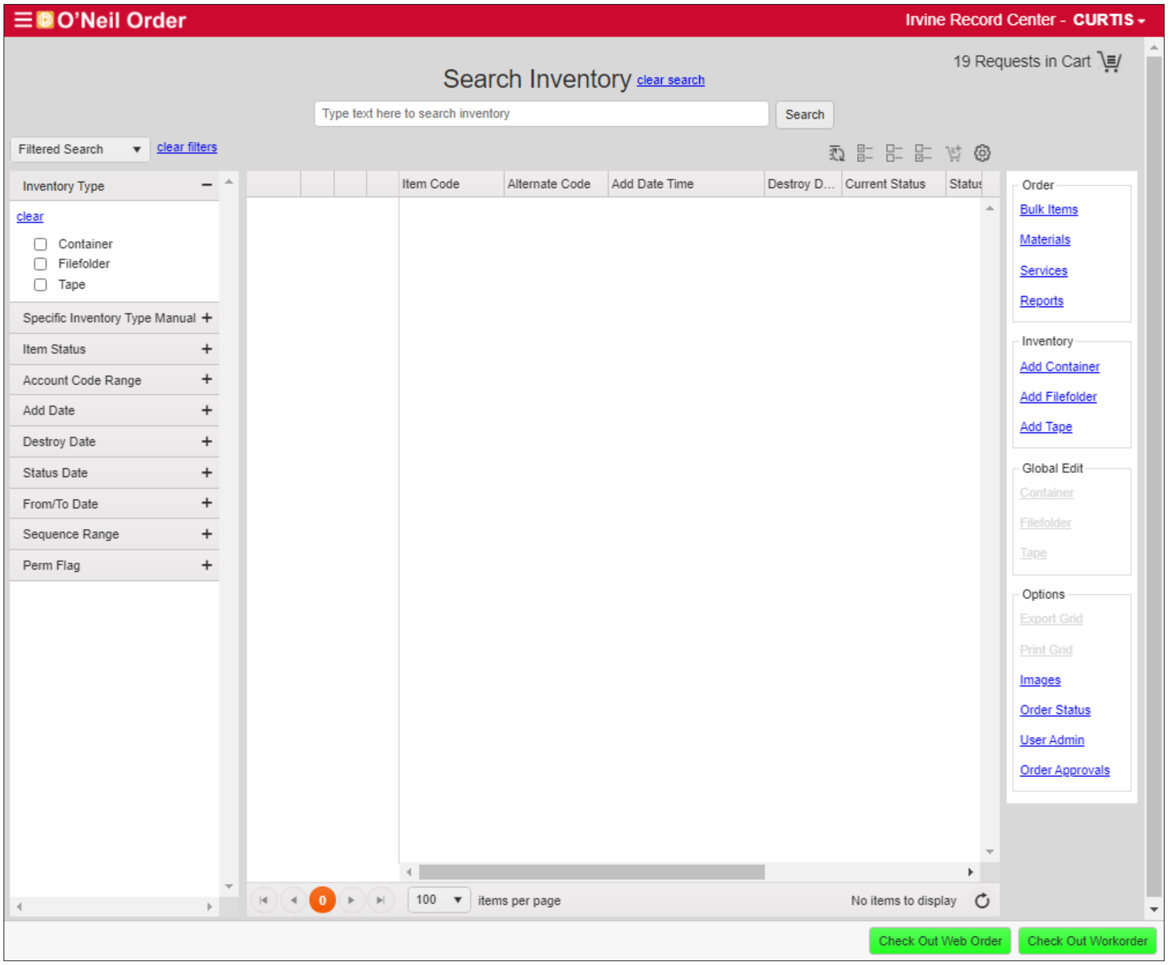
O'Neil Order has a built-in time out feature. After a certain period of inactivity, you will be logged out.



You will be required to log in again in order to continue working.

Grids

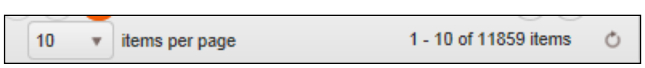
O'Neil Order opens to the **Search Inventory** screen.



At the top of the screen is a search field. Search filters display on the left side of the screen. Links to specific grids display on the right side of the screen.

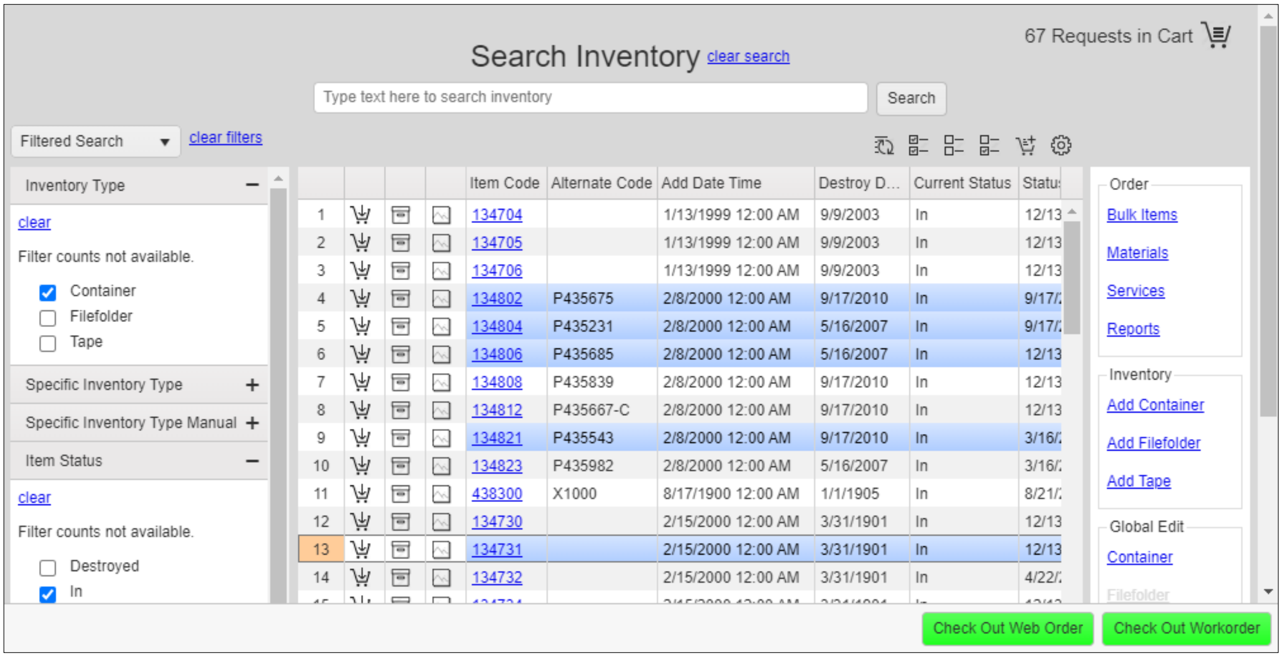
Page numbers display at the bottom of the grid. Click a number to go directly to that page. You can also use the arrow icons to move one page at a time, or go to the first or last page.

Next to the page numbers you can select the number of items you want to display on each page. Click the drop down arrow to select a number. The right side of the screen displays the total number of items on the grid, as well as which ones are on the current page.



Select/Unselect Rows

An item in the grid must be selected before any action can be taken for that item. When an item is selected, the row is blue. The current row has a line around it and the row number is highlighted whether it is a selected row or not.



NOTE: It is possible to change the default colors in the system, so your colors may be different.

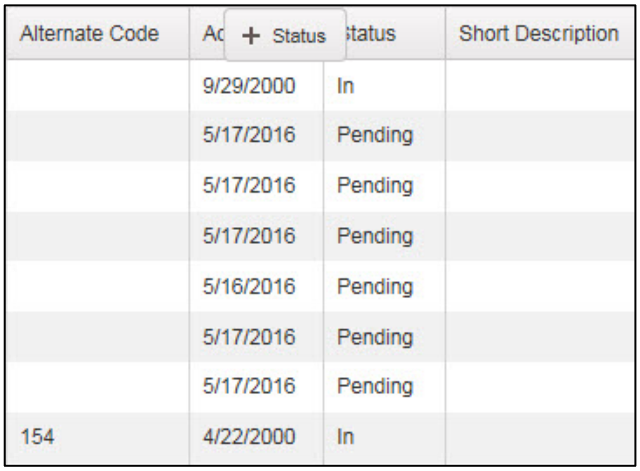
Whenever rows are added to any grid, they are automatically selected.

Columns

Data in a grid can be sorted by column in ascending or descending order. To sort on a column, click in the column heading field. An up or down arrow displays to let you know whether it is sorting in ascending or descending order. Click the heading again to reverse the sort order. Click again to return to the default sort order.

Account ↑	Item Code ↓	Alternate Code
1001	438305	
1001	438304	
1001	438303	
1001	438302	142
1001	438300	X1000
2000	568234	
2000	134647	
2000	134646	
2000	134645	
2000	134644	
2000	134643	
2000	134642	
2000	134641	
2000	134640	
2000	134639	

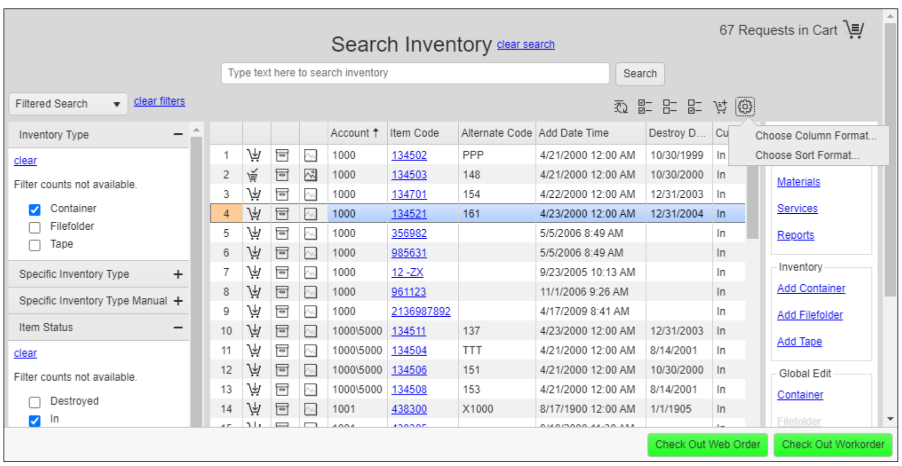
Columns cannot be removed from a grid; however, the order they appear in the grid can be changed. To move a column, click on the column heading and drag to the new location.



The **+** in the column heading indicates that it is being moved.

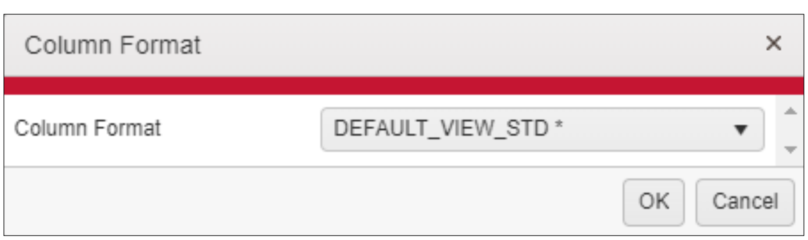
Column Format/Sort Format

If your record center has set up Column and Sort Formats for you, they will be available in grids from the **Settings** menu. Click the **Settings** icon and select the option you want.



Choose Column Format

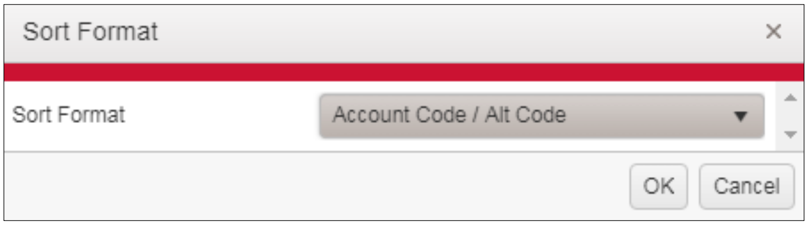
The Column Format determines which columns appear in the grid.



Click the drop down list to display all of the column formats that have assigned to you. They are sorted by name in ascending order. The default column format has an asterisk next to it. Select the one you want, and click **OK**. The columns in the grid are updated and the grid is refreshed with the new data. Your selection is saved until you change it.

Choose Sort Format

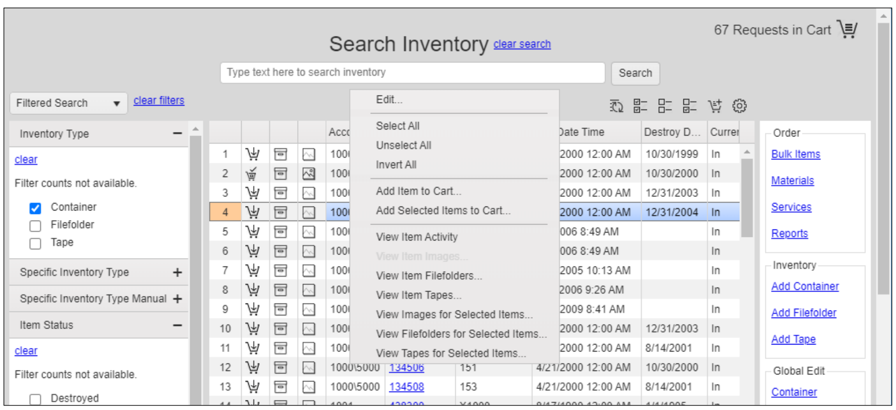
The Sort Format determines the order in which data is sorted in the grid.



Click the drop down list to display all of the sort formats that have been assigned to you. They are sorted by name in ascending order. Select the one you want, and click **OK**. The grid is re-sorted and refreshed. Your selection is saved until you change it.

Context Menu

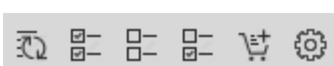
Right click on a row to bring up a context menu.



You can edit the record for that item or select from other menu options. Some of the options in this menu are also available elsewhere on the screen.

Icons

Most grids contain the following icons.



Reload Results: Recomputes the data associated with the grid and displays the first page of the grid.

Select All: Selects all items that are displayed in the grid.

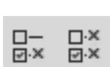
Unselect All: Unselects all items that are displayed in the grid.

Invert All: Changes all selected items to unselected and all unselected items to selected.

Add Selected Items to Cart: Adds all selected items in the grid to the cart.

Settings: Displays the Settings menu items.

When you select **Advanced Search** in the **Inventory** grid, two additional icons are available.

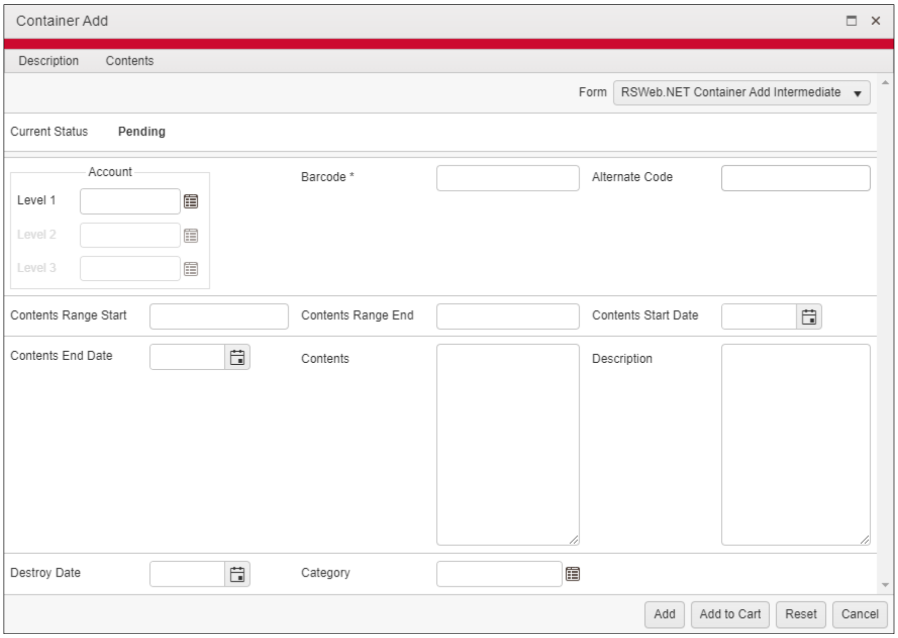


Clear Selected: Clears all selected items from the grid.

Clear All: Clears all items from the grid, whether they are selected or not.

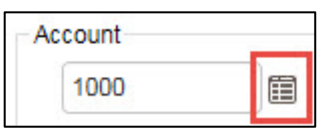
Dialog Boxes

Dialog boxes display to request needed information. Within the dialog boxes there are different types of fields.

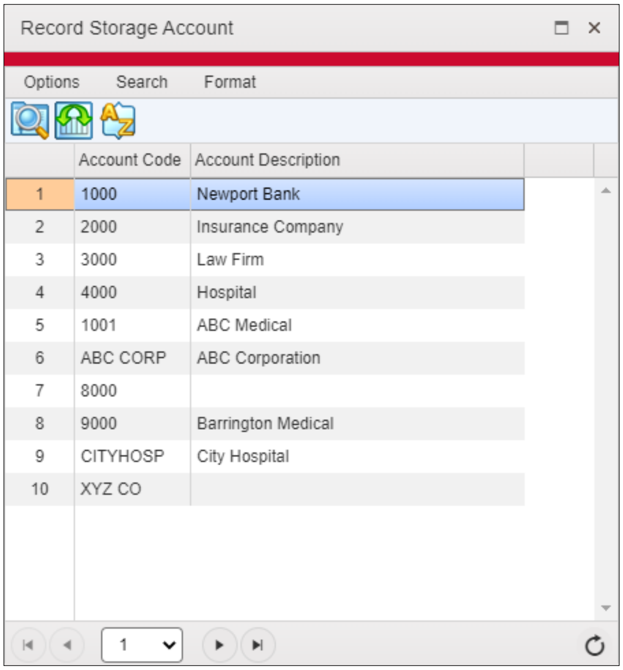


Grid Picker

Some fields require an entry from pre-determined data. In this case a grid picker is available. For the field below, to bring up a list of available accounts, click the grid picker.

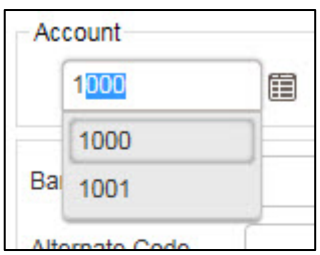


The **Account** grid appears.



Right click on the account you want and select **OK**. The grid closes and your selection displays in the Account field.

You can also manually type in the data. As you start typing, the field autopopulates. If more than one item fits the first few numbers you typed, a list appears with all matching accounts beginning with the numbers you entered. You can select from the list or continue typing.

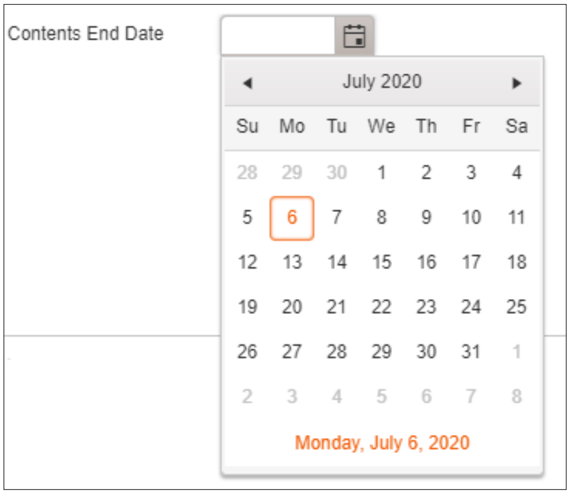


Date/Time Fields

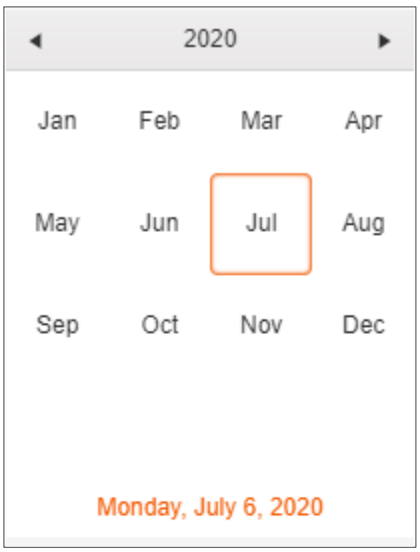
Date and Time fields default to the current date at 12:00 AM. You can enter the date and time, or click the date or time picker.

Date Picker

The date picker brings up a calendar for you to make your selection.



Click the left and right arrows at the top to move to the next or previous month. Click on the month/year to bring up a list of all months.



Click the left and right arrows at the top to move to the next or previous year. Once you make your selection, you are instantly returned to the previous screen.

You can also use the following keyboard shortcuts to select dates.

Keys	**Action**
Left arrow	Highlights the previous day
Right arrow	Highlights the next day
Up arrow	Highlights the same day from the previous week
Down arrow	Highlights the same day from the next week
Ctrl + left arrow	Navigates to the previous month
Ctrl + right arrow	Navigates to the next month
Ctl + up arrow	Navigates to the next view
Ctrl + down arrow	Navigates to the previous view

Home	Highlights the first day of the month
End	Highlights the last day of the month
Enter	If in “month” view, selects the highlighted day. In other views, navigates to a lower view.

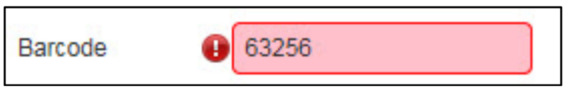
Date/Time Picker

There is also a date/time picker that combines both date and time in the same field.

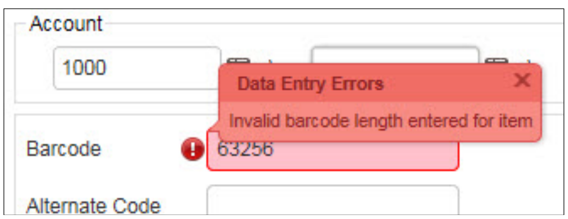
The date and time pickers are side by side. Click them individually to make your selections.

Errors/Warnings

If an invalid entry is made in a field, the field is highlighted in red with an error/warning icon.

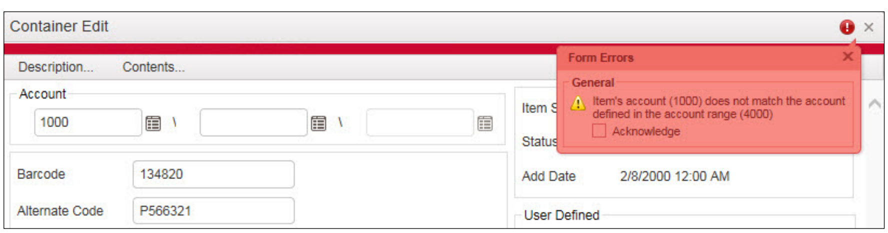


Click the icon to view the message.



Click the **X** to close the message. You cannot save the dialog box until the error is corrected.

Errors/Warnings that relate to the entire dialog box display in the top right corner. Click the red icon to display the message.

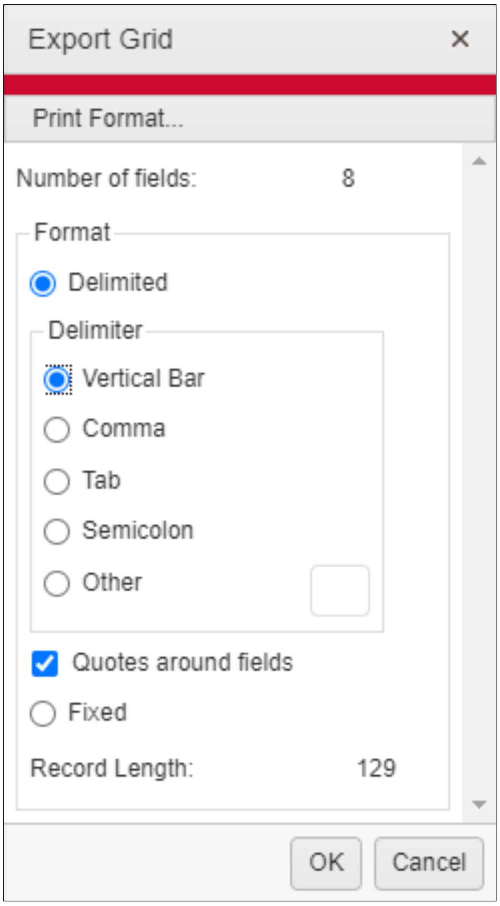


Errors need to be corrected. Warnings do not require action, they just need to be acknowledged. Select the check box to acknowledge the error. Click the **X** in the top right corner to close the message. You cannot save your change until the error has been corrected or the warning has been acknowledged.

Export Grid

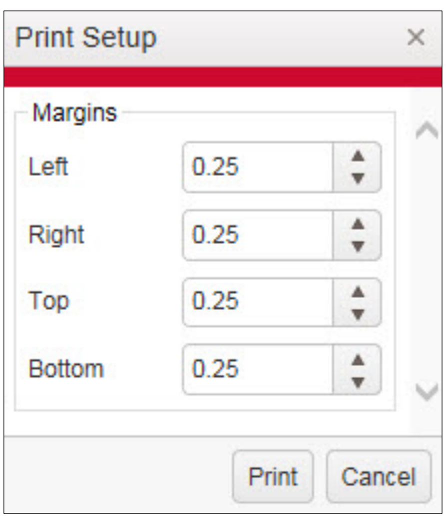
All grids in O’Neil Order have an Export feature. This allows you to export data to a text file that can be viewed in other programs.

Load the data you want to export onto the grid. Click the **Export Grid** link in the **Tasks** section on the right side of the screen. The **Export Grid** dialog box appears.



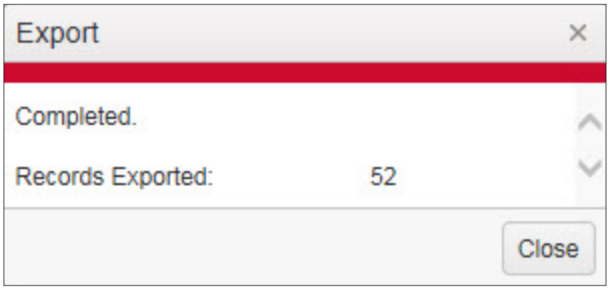
By default, the Delimiter is a vertical bar (|) and the *Quotes around fields* check box is selected. Both settings can be changed.

To change the margins, click **Print Format**.



Adjust your margins as necessary and click **Print** to return to the **Export Grid** dialog box. Click **OK** to begin the export.

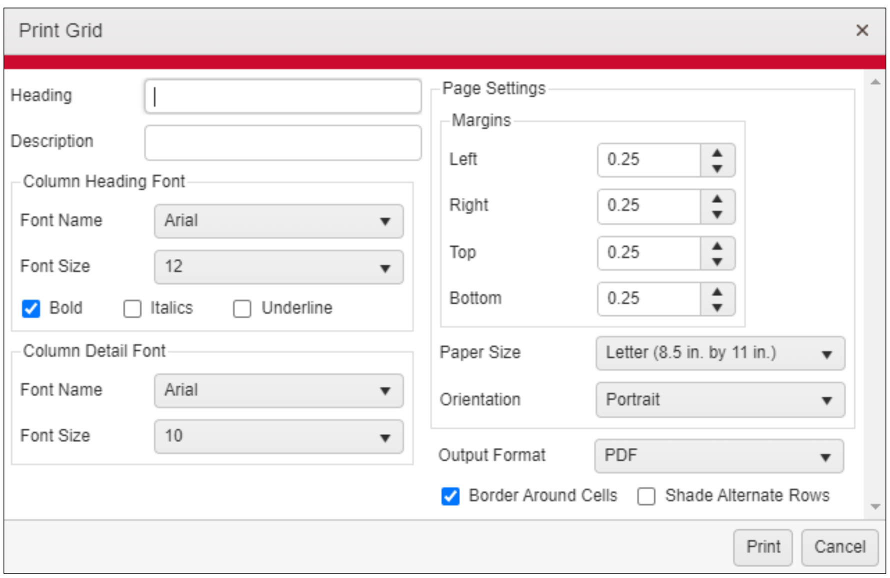
When the export has completed, you are notified of the number of records exported.



Click **Close**, and you can choose to open or save the file.

Print Grid

This option is used to print the data displayed on a grid. The data in the grid is formatted into a printable black and white table.



Enter a Heading and Description for the report that will print from the grid.

Column Heading Font

This section applies to the column heading text only. Click the drop down arrow next to Font Name to select from the available fonts. Click the drop down arrow next to Font Size to select a font size. You can also select Bold, Italics, or Underline.

Column Detail Font

Select the Font Name and Font Size for the text in the columns.

Page Settings

You can adjust the margins, select a paper size, and select the page orientation (portrait/landscape).

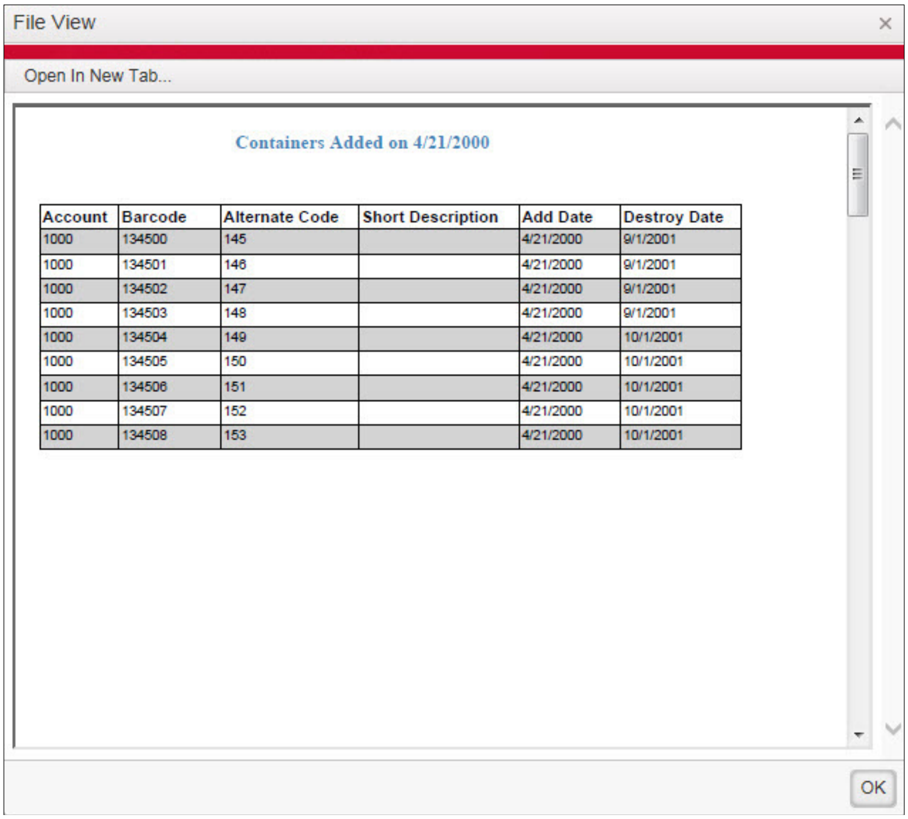
Next, select the Output Format. You can save the grid as a PDF, Microsoft Excel spreadsheet, or Microsoft Word document.

Finally, you can choose to print a border around the cells, and/or shade alternate rows to make the report easier to read.

When you have completed all fields, click **Print** to save the report.

NOTE: When you print a grid, remember that only selected rows on the grid will print. If the marked row count exceeds the maximum rows that can be printed, you are notified and given the option to continue or cancel.

The **File View** dialog box displays your report.



Containers Added on 4/21/2000

Account	Barcode	Alternate Code	Short Description	Add Date	Destroy Date
1000	134500	145		4/21/2000	9/1/2001
1000	134501	146		4/21/2000	9/1/2001
1000	134502	147		4/21/2000	9/1/2001
1000	134503	148		4/21/2000	9/1/2001
1000	134504	149		4/21/2000	10/1/2001
1000	134505	150		4/21/2000	10/1/2001
1000	134506	151		4/21/2000	10/1/2001
1000	134507	152		4/21/2000	10/1/2001
1000	134508	153		4/21/2000	10/1/2001

Click **Open in New Tab** to view your report in full screen.

Web User Admin

Overview

User Admin allows an administrator (set up by your record center) to do the following:

- add/modify users
- add/assign model users
- deactivate users
- delete users with no activity
- modify function access
- modify account access

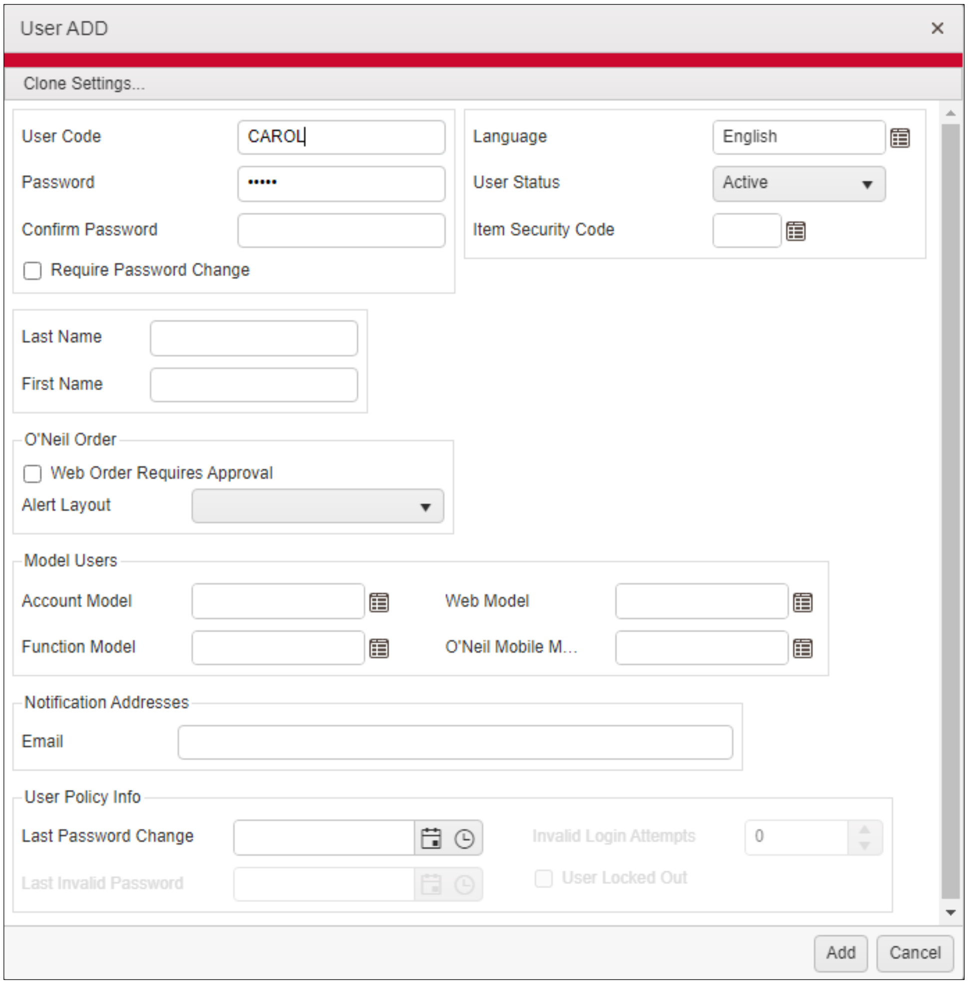
When other web users are assigned to a Web User Admin, the Web User Admin can view orders submitted by those users.

If the Web User Admin has also been given permission to modify the cart for other users, they will be able to delete or check out items placed in the cart by those users. In this case, the cart will display Placed in Cart By and Placed in Cart Date Time columns rather than the Add Date column

Add a User

To add a new user, right click anywhere in the grid and select **Add**.

NOTE: Only a User Admin can add new users.



User Information

User Code: Enter a code that the system will use to identify the user. It must be unique in the record center's O'Neil Stratus/RS-SQL database. This is what the user will type when logging into the system. This is a required field.

Password: Enter the password the user will type to log in. This is a required field.

Confirm New Password: This field allows you to re-type the password to make sure you didn't inadvertently type a wrong character. If you enter different characters in the Password and Confirm New Password fields, the system warns you. This is a required field when the Password field has been changed.

Require Password Change: If selected, the next time the user logs into O'Neil Order, they will be prompted to change their password. They must change their password to continue. When selected, any existing password policies are ignored for the password entered by the Administrator. However, the new password entered by the user will need to comply with the password policies.

Last Name: Enter the last name of the user. This is a required field.

First Name: Enter the first name of the user. This is a required field.

Language: Select a language for the user. Depending on what your record center has set up, there may be only one language available.

User Status: Select whether the user is Active or Inactive. This is set to Active by default when adding a new user.

Item Security: Select the item security code to assign to the user. To access an item, the user's item security code must match or exceed the code assigned to the item. The Administrator can only select item security codes that are equal to or lower than what they themselves have.

O'Neil Order

Web Order Requires Approval: Select this check box if the user requires approval for web orders they create. When selected, the text on the **Submit** button in the **Checkout** dialog box is changed to **Place Web Order for Approval**, and the web order is created with a status of Awaiting Approval.

Alert Layout: Alerts display at the top right corner of the O'Neil Order screen. There are three alert layouts available.

Order Approvals: Displays the number of web orders that have been submitted for approval. This alert is assigned to users doing approvals.

Order Rejections: Displays the number of Web Orders that have been rejected by an approver and need further action. This alert is assigned to users who need approval.

Order Approval And Order Rejections: Displays both alerts. This alert is assigned to users that approve other's orders, but also need approval for their own orders.

If you do not want to display alerts for the user, leave the field blank.

Model Users: To have this user reference a model user, click the grid picker and select a model user. Referencing a model user means the attributes of the model user will apply to this user. Three separate categories are available for referencing. This allows you to assign a different model user to each category, or to assign a model user to some but not all of the categories.

Account Model: includes account access, which determines what accounts the user will have access to.

Function Model: includes function access, which determines what features of O'Neil Order the user will have access to.

Web Model: includes forms, column format groups, sort format groups, web query groups. If a user is assigned a Web Model User, both Web Order Requires Approval and Alert Layout will be overridden.

O'Neil Mobile Model: includes function access for features in O'Neil Mobile.

Unlike cloning, which copies this information from one user to another, referencing a model user means if a change is made to the model user, it is automatically made to any user that references that model user.

Email: Enter an email address for the user (optional).

User Policy Info: This section displays information that is specific to password policies. If the User Policy setting is disabled by your record center, this section will be grayed out and you cannot edit it.

Last Password Change: Displays the last time the user's password was changed.

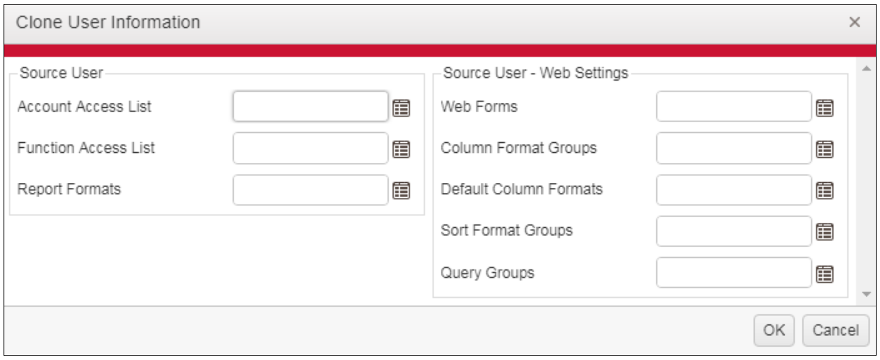
Last Invalid Password: Displays the most recent date/time that an invalid password was entered by the user.

Invalid Login Attempts: Displays the number of consecutive invalid login attempts. It is set to zero if the most recent login attempt was successful.

User Locked Out: This is automatically set if the user violated the Lockout Policies set by the Record Center. If a user is locked out, clear this check box to unlock them.

Clone User Information: This section allows you to clone user access information from another user. This can save you a tremendous amount of time. Even if the access you want to give a user is slightly different, it may still be faster to clone from another user, and then make your changes.

NOTE: If information is originally cloned and then a model user is selected, the cloned information is saved. It is ignored, but saved so that if the model user is ever unselected, the user then reverts back to the cloned settings.



Account Access List: Account Access determines what accounts the user will have access to. Click the grid picker to select a user to clone account access from. Only users the Administrator has access to appear in the list. If none is selected, the new user will not have access to any accounts.

Function Access List: Function Access determines which features of O'Neil Order the user will have access to. Click the grid picker to select a user to clone function access from. Only users the Administrator has access to appear in the list. If none is selected, function access is set to No for all functions.

Report Formats: Report Formats include all the information that is determined when you print a report, such as Sort Order and Column Format. Click the grid picker to select a user to clone report formats from. Only users the Administrator has access to appear in the list. If none is selected the new user will not have access to any reports.

Web Forms: Web Forms are all the custom data entry forms available to the Web user. Click the grid picker to select a user to clone Web forms from. Only users the Administrator has access to appear in the list. If none is selected the new user will not have access to any forms.

Column Format Groups: Column Formats determines which columns appear in grids. Click the grid picker to select a user to clone column format groups from. Only users the Administrator has access to appear in the list. If none is selected the new user will only have access to the default column format.

Default Column Formats: Default Column Formats determines which column format to use as the default if more than one format exists. Click the grid picker to select a user to clone default column formats from. Only users the Administrator has access to appear in the list. If none is selected the new user will only have access to the default column format.

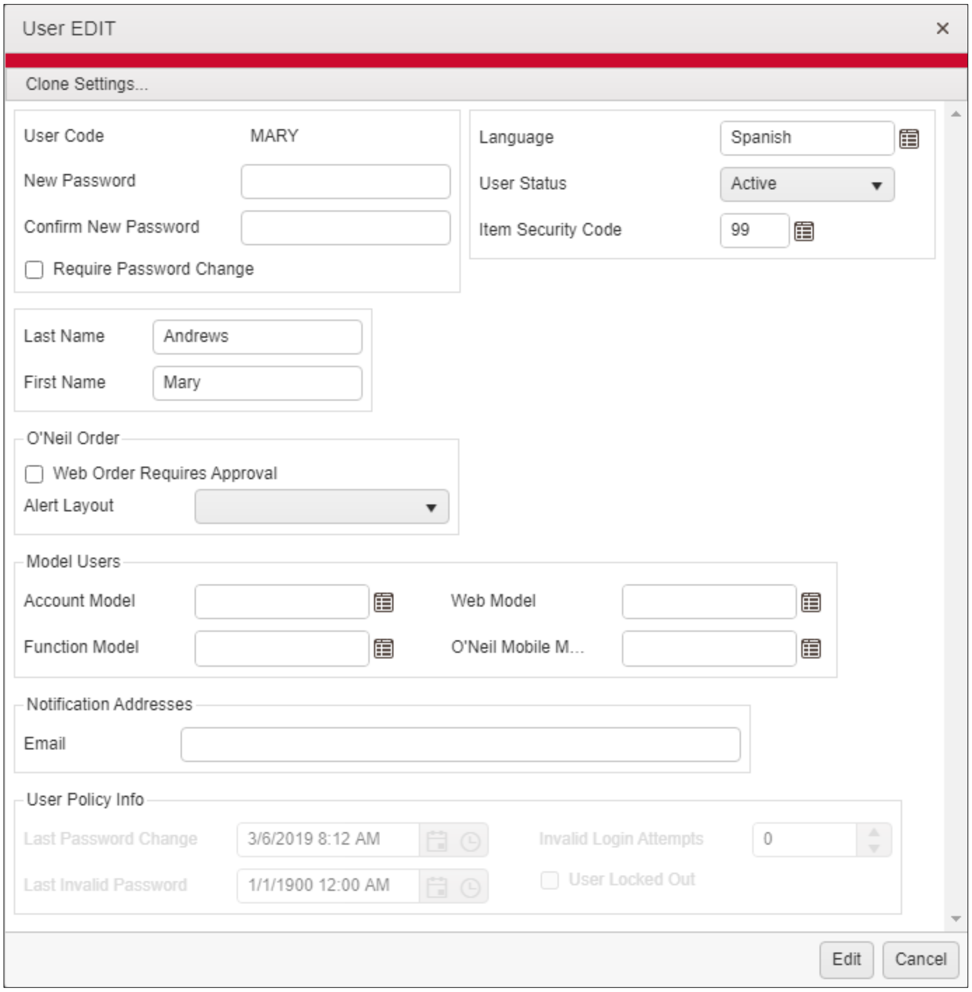
Sort Format Groups: Sort Format determines the order in which data is sorted in grids. Click the grid picker to select a user to clone sort format groups from. Only users the Administrator has access to appear in the list. If none is selected the new user will only have access to the default sort format.

Query Groups: Query determines which search queries are available to the Web user in each grid. Click the grid picker to select a user to clone query groups from. Only users the Administrator has access to appear in the list. If none is selected the new user will not have access to any queries.

Once all fields are completed, click **Add** to save the new user.

Edit an Existing User

To edit an existing user, load the user onto the grid and click the **Edit User** icon, or right click on the user and select **Edit**.

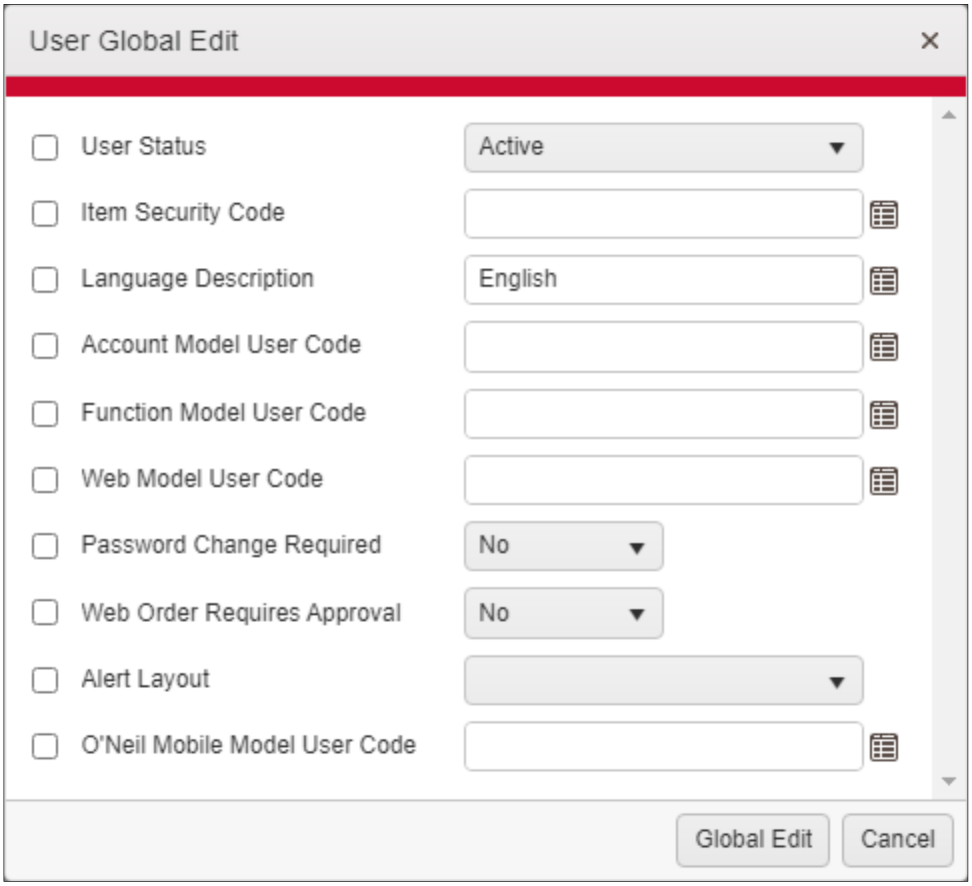


Make the desired changes and click **Edit**.

NOTE: A limited number of fields are available when an administrator is editing their own User information.

Global Edit Existing Users

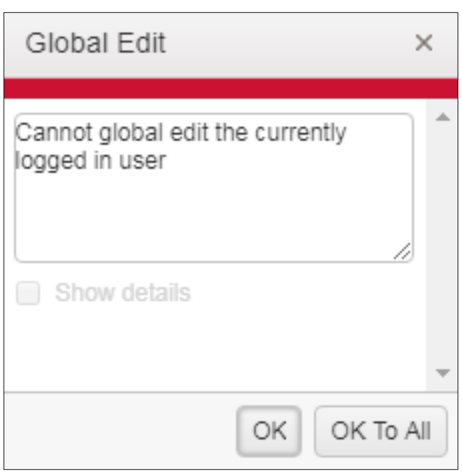
To edit several existing users at once, load the users onto the grid and from the **Options** menu, select **Global Edit**. The **User Global Edit** dialog box appears.



NOTE: A limited number of fields are available for global edit.

Make the desired changes and click **Global Edit** to save.

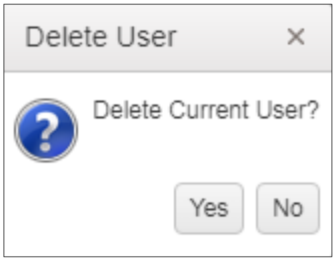
The user logged in cannot include themselves in a global edit. If the Administrator is selected in the **User Admin** grid, when **Global Edit** is clicked the following message appears.



Click **OK** and the changes are applied to all selected users except the user logged in.

Delete an Existing User

To delete an existing user, load the user onto the grid. Right click on the user and select **Delete User**. The following message displays.

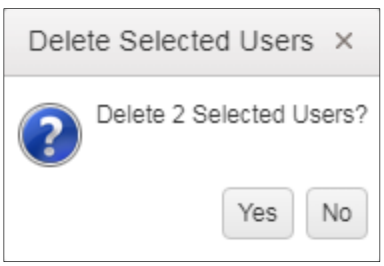


Click **Yes** to delete the user.

NOTE: The Administrator cannot delete themselves from the O'Neil Order database, and they can only delete other users that have not yet performed any work. Users that have performed work cannot be deleted. To ensure these users cannot log in to O'Neil Order, they should be set to Inactive in the **User Edit** dialog box.

Delete Selected Users

To delete multiple users at once, load them onto the grid and mark them. Right click anywhere in the grid and select **Delete Selected Users**.



Add a Model User

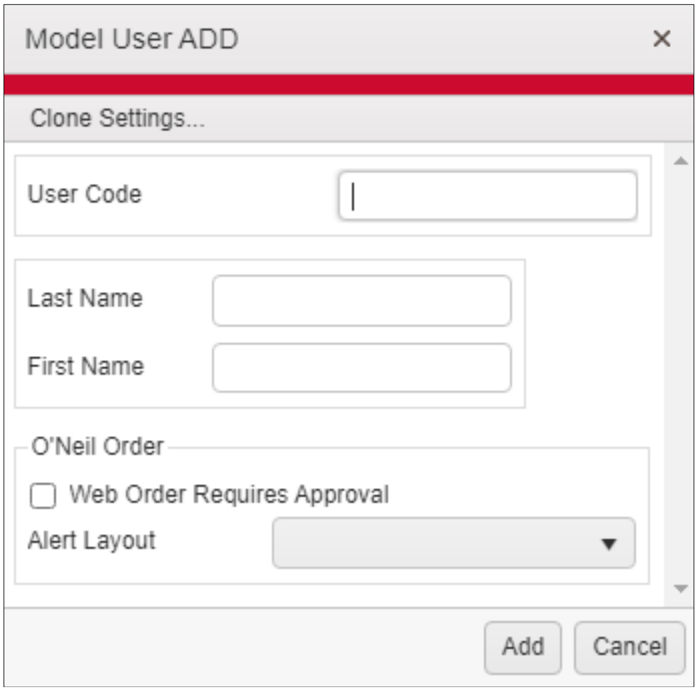
The Model User feature was designed to allow you to create a model user that other users can then reference for the following attributes.

- account access
- function access
- forms
- column format groups
- sort format groups
- query groups

This works similar to cloning; however, when changes are made to the model user, they are automatically made to all users that reference the model user.

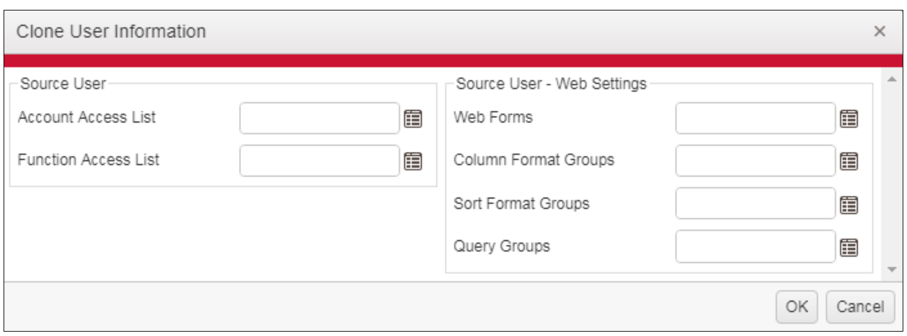
NOTE: When a user references a model user, the attributes inherited from the model user cannot be modified for the user. Changes can only be made to the model user.

To create a model user, from the **User Admin** grid, right click anywhere in the grid and select **Add Model User**.



Enter a User Code, Last Name, and First Name that will help you easily identify this as a model user. You can also indicate that the user requires web order approval and select an Alert Layout.

Under **Clone Settings**, use the grid pickers to select which user you want to clone from for each of the attributes.



Click **OK** to return to the **Model User Add** dialog box and then click **Add** to save the Model User.

NOTE: Model users cannot log in to O'Neil Order.

Function Access

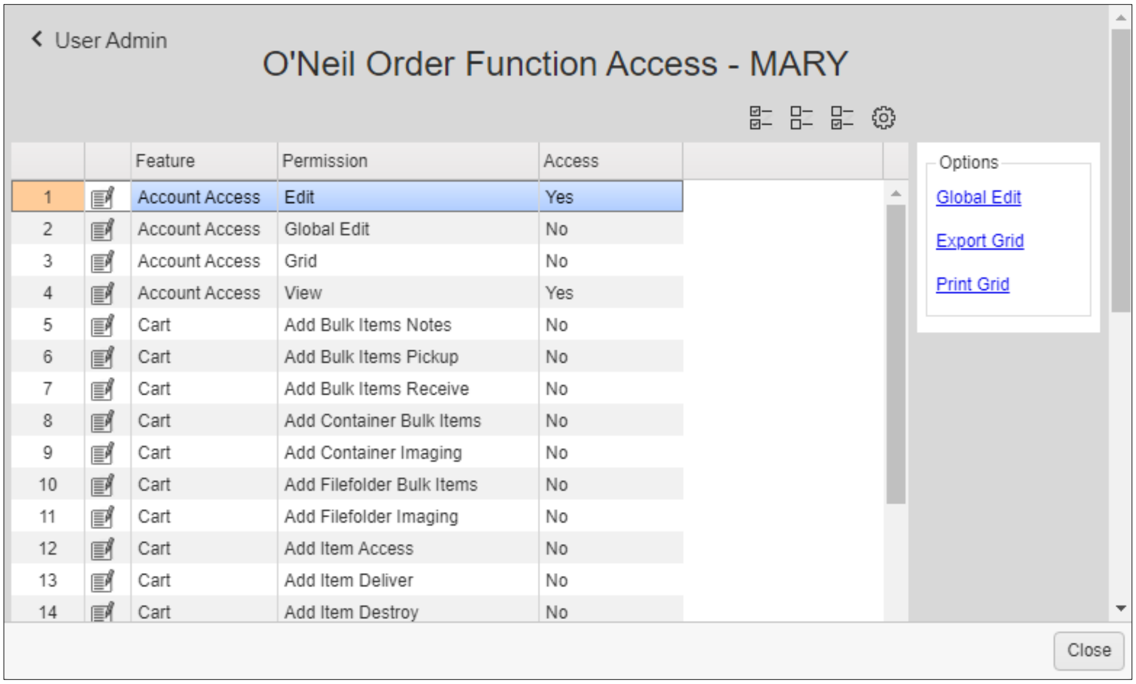
This option is used by the Administrator to edit function access for users. This determines which features the user will have access to. The only function access records that appear are the ones that the Administrator has access to.

NOTE: The **Web Function Access** menu option is only for record centers that are also using RSWeb.NET. If you are only using O'Neil Order, you will not need to use that menu option.

Edit

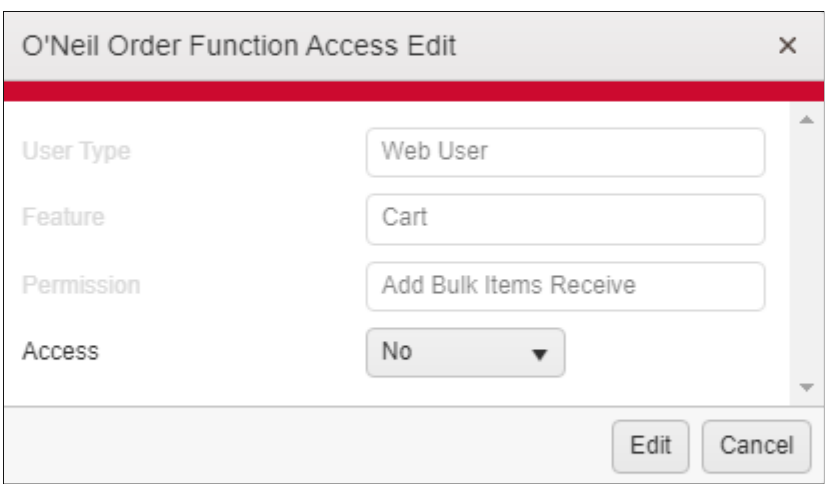
To edit function access for a user, load the user onto the grid. Right click on the user and select **O'Neil Order Function Access**.

NOTE: The Administrator can view his own function access but cannot change it.



All available functions appear. Right click on the function access you want to change, and select **Edit**.

NOTE: When accessing O'Neil Order Function Access for the user currently logged in, the **Edit/View** menu option is not available.



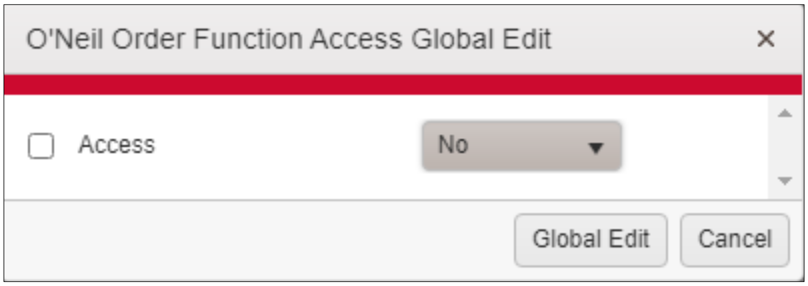
Use the drop down arrow to change the Access field and click **Edit**. Access for the selected function is changed.

NOTE: If a user references a model user, you cannot edit function access for that user. You can, however, edit function access for the model user and all changes will be applied to users referencing the model user.

Global Edit

To edit more than one function access at a time, select the functions you want to edit. From the **Options** menu, select **Global Edit**.

NOTE: When accessing O'Neil Order Function Access for the user currently logged in, the **Global Edit** link is not available.



Use the drop down arrow to change the Access field and click **Global Edit**. Access for all selected functions is changed.

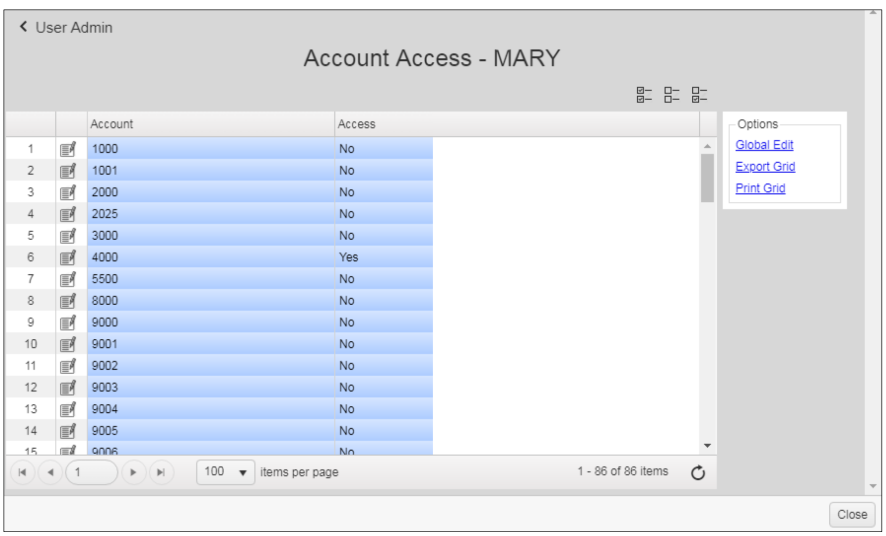
Account Access

The Administrator can use this menu option to edit account access for users. The only accounts that appear are the ones that the Administrator has access to.

NOTE: The Administrator can view his own account access but cannot change it.

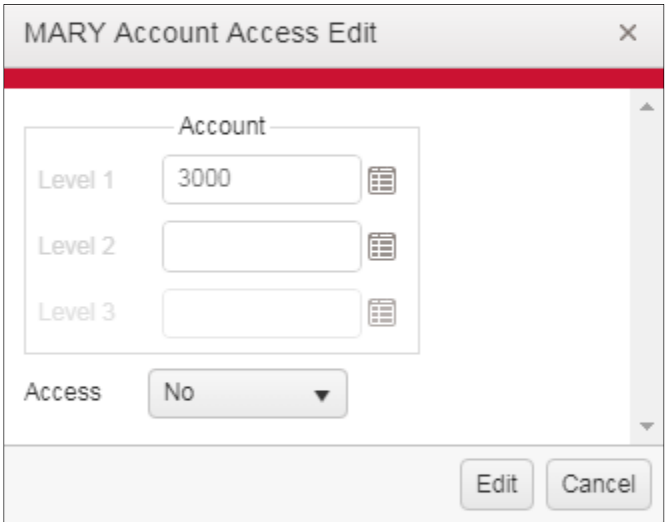
Edit

To edit account access for a user, load the user onto the grid. Right click on the user and select **Account Access.**



Select the account access you want to edit and click the **Edit** icon, or right click on it and select **Edit**.

NOTE: When accessing Account Access for the user currently logged in, the **Edit/View** menu option is not available.

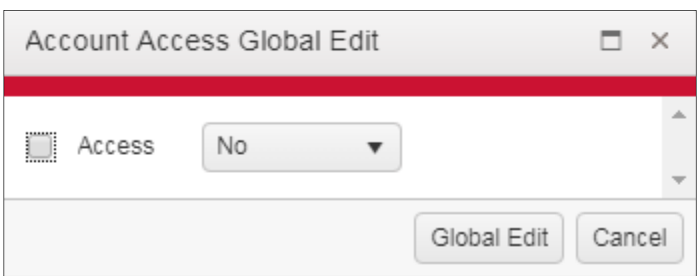


Use the drop down arrow to change the Access field and click **Edit**. The selected account access is changed.

Global Edit

To edit more than one account access at a time, select the accounts you want to edit. From the **Options** menu, select **Global Edit**.

NOTE: When accessing Account Access for the user currently logged in, the **Global Edit** link is not available.



Use the drop down arrow to change the Access field and click **Global Edit**. Access for all selected accounts is changed.

View

The **Account Access View** dialog box is identical to the **Account Access Edit** dialog box, except that no changes are allowed. It is read-only.

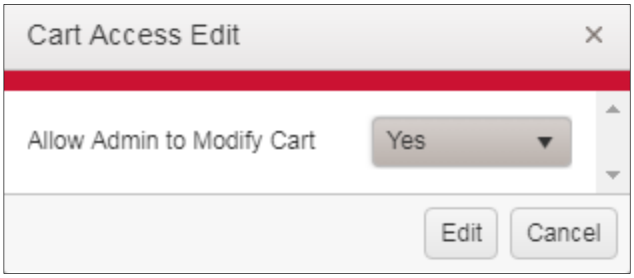
Function Access

The following function access relates to the **Account Access** grid.

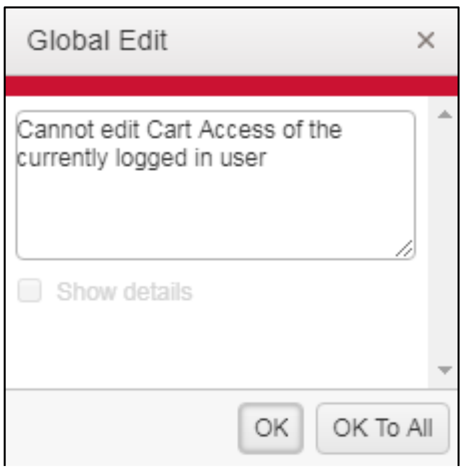
Feature	Permission	Access
Account Access	Edit	No
Account Access	Global Edit	No
Account Access	Grid	No
Account Access	View	No

Cart Access/Cart Access Selected Users

Cart Access allows the administrator to edit or global edit *Allow Admin to Modify Cart* for users. When set to Yes, the administrator can delete or check out items from the user's cart. The administrator can also view orders submitted by the user.



The user logged in cannot edit their own cart access, or include themselves in a global edit. If the administrator is selected in the **User Admin** grid, when **Cart Access Global Edit** is selected, the following message appears.



Save List/Load List

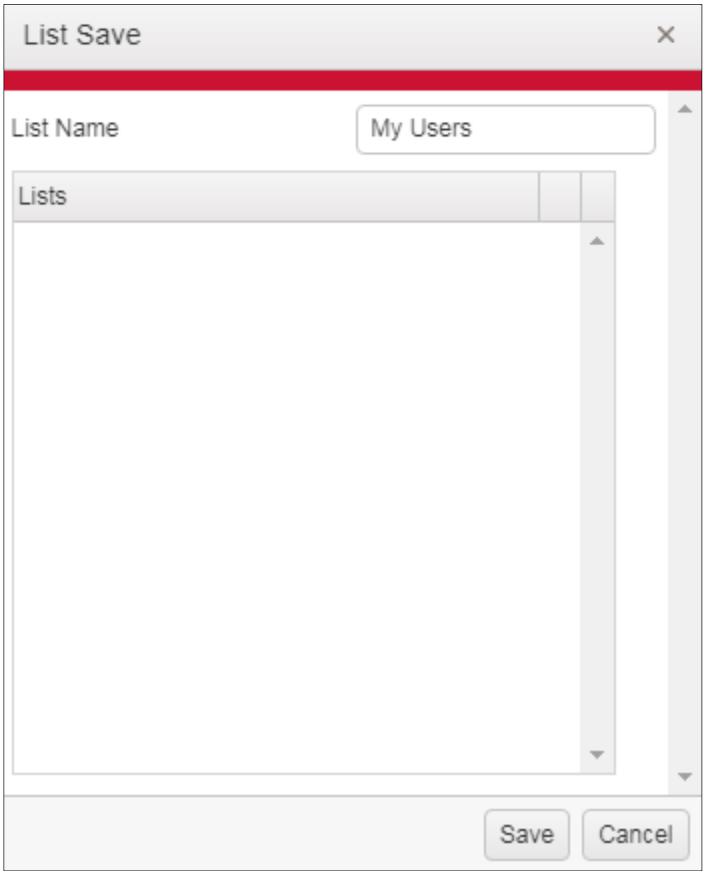
In the **User Admin** grid, you can save and load a list.

NOTE: The **Load List** and **Save List** links are only available when you are in the Advanced Search mode.

Save List

This option is used to save a list of items that have been loaded onto a grid. You can then use the **Load List** menu option to quickly load that same list of items any time you need it.

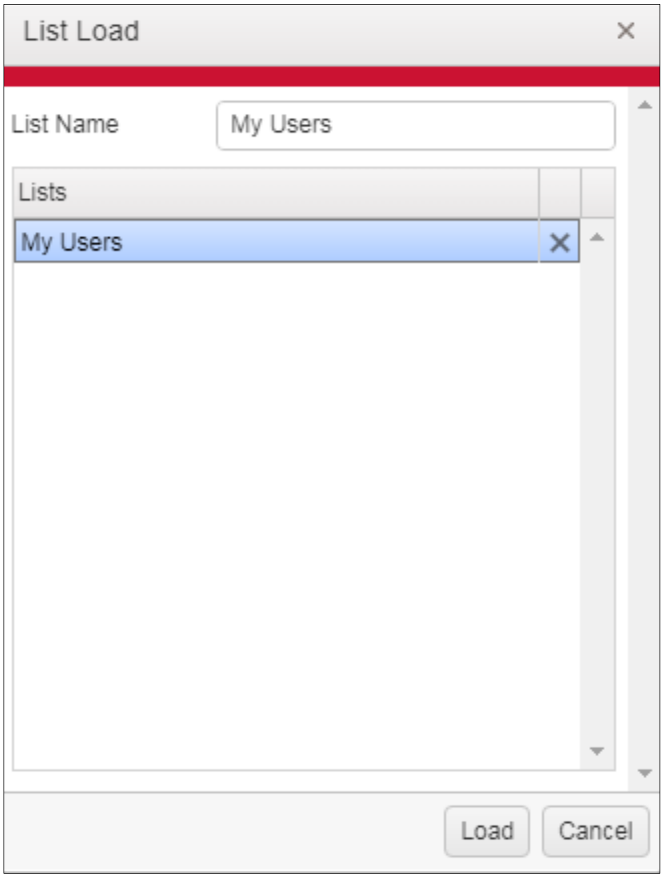
Load all the items you want to appear in your list. Make sure they are selected. Then from the **Options** menu, select **Save List**.



Enter a name for the list (maximum of 24 characters) and click **Save**. The list is saved and can now be used again. Click **Cancel** to return to the grid.

Load List

Once a list of items has been saved, it can be loaded again. From the **Options** menu, select **Load List**.



Select the list you want to load and click **Load**. The list of items is loaded onto the grid.

To delete lists from this dialog box, click the **X** next to the list name.

Function Access

The **Load List** and **Save List** links are only available if the following Function Access is set to Yes.

Feature	Permission	Access
Item	Load List	Yes
Item	Save List	Yes

Print / Export

You can print or export from the **User Admin** grid, the same as all other grids in O'Neil Order.

Inventory

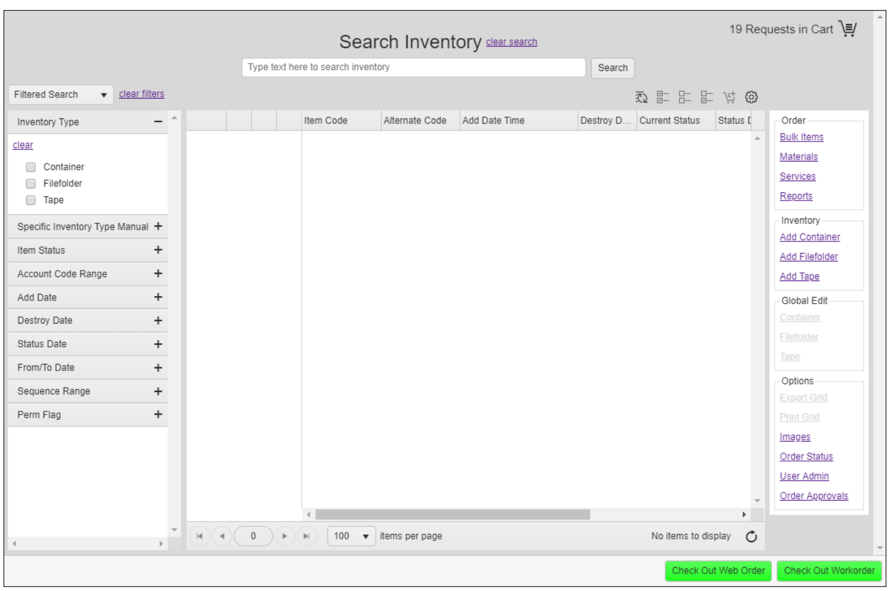
Introduction

O'Neil Order and its connection with your record center's database means that you can access your stored items and actually update the information associated with them. You can also add new items. This makes data entry easier, eliminates duplicating labor, and ensures accuracy.

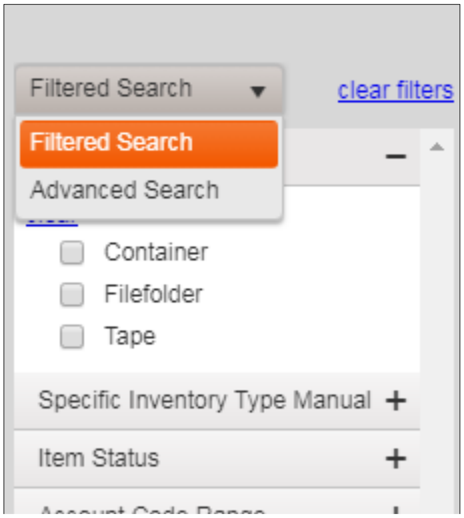
You can add new items at the click of a button, or search for all the existing items that you want to edit. The database at the record center will be searched, and the items that meet your criteria will be loaded onto your screen. Once the items are loaded, you can view and edit fields for an item, or add the item to your cart.

Search Inventory

O'Neil Order opens to the **Search Inventory** screen.



There are two different search modes available, Filtered Search and Advanced Search.



Filtered Search

At the top of the screen is a search field. Search filters display on the left side of the screen. Additional options display on the right side of the screen.

Search Text Field

To initiate a search, enter text into the Search text field and click **Search** or press the **Enter** key. To clear the results of a previous search, click Clear Search. This clears all results and all filters. You can also clear the contents of the Search text field (which will revert to the hint) and click **Search** or press **Enter**. Merely tabbing out of the field will not initiate (or clear) a search.

The search will be completed on all items in the database. To limit the search, filters can be applied.

Columns Searched

The text search searches across all of the text columns relating to items. The following columns are included:

- Item Code
- Short Description
- Alternate Code
- User Defined Field 1
- User Defined Field 2
- User Defined Field 3
- User Defined Field 4
- Item Set Name
- Sequence Begin
- Sequence End
- Contents
- Long Description

- Item Code Alias
- Item Keyword

Supported Searches

Below are some examples of searches that are supported in O'Neil Order.

- If you enter a single word (e.g. *smith*), that word must appear in at least one of the indexed fields above to return that item.
- If you enter two or more words separated by spaces (e.g. *john smith*), all of those words must appear in at least one of the indexed fields above to return that item. The order of those words does not matter.
- If you enter text surrounded by double quotes (e.g. *"smith john"*), the whole string must appear in at least one of the indexed fields above to return that item.
- Quoted text and non quoted text can be mixed. e.g. *"smith john" medical* means the string *smith john* and the word *medical* must appear in at least one of the indexed fields above to return that item. The order of the two does not matter.
- If you put an asterisk (*) at the end of a word, the asterisk matches zero, one, or more characters following the word. e.g. *jo** would match "john", "joe", "josh" etc. *jo* smith* would match "john smith", "smith joe" etc.
- Searches are not case sensitive.

Searches not Supported

The following searches are not supported.

- *john AND smith* - The "AND" keyword is not supported. However, words are automatically "AND-ed" together.
- *john OR smith* - The "OR" keyword is not supported.

There are also some words and characters that will not be matched:

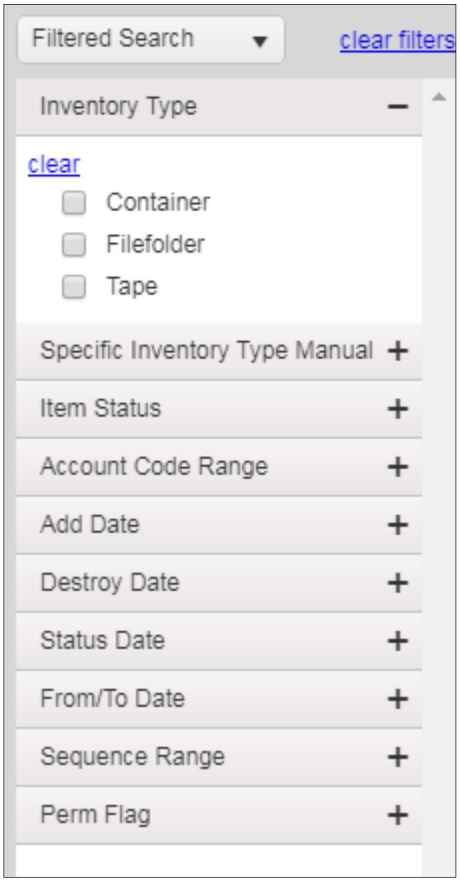
- Searching for individual numbers or characters. These are not indexed by SQL Server's Full Text Search. So searching for *A* will not match items with an "A" in them.
- Searching for one of 116 words that SQL Server's Full Text Search does not index because they are considered too commonly used. These words are as follows: about, after, all, also, an, and, another, any, are, as, at, be, because, been, before, being, between, both, but, by, came, can, come, could, did, do, does, each, else, for, from, get, got, had, has, have, he, her, here, him, himself, his, how, if, in, into, is, it, its, just, like, make, many, me, might, more, most, much, must, my, never, no, now, of, on, only, or, other, our, out, over, re, said, same, see, should, since, so, some, still, such, take, than, that, the, their, them, then, there, these, they, this, those, through, to, too, under, up, use, very, want, was, way, we, well, were, what, when, where, which, while, who, will, with, would, you, your.

NOTE: These words are language dependent so the words above are for the English language which would be the default Full Text Search language for most databases.

- Leading zeros on strings may be ignored when doing a partial match. For example, *0000123** will match "0000123" but it will also match "0123" or "123".

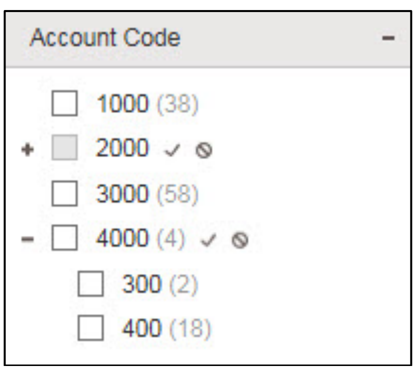
Search Filters

Search filters are used to narrow down your search.



Click the **+** to expand a section. Click the **–** to close a section.

Filters such as accounts that contain sub accounts are displayed in a tree view.

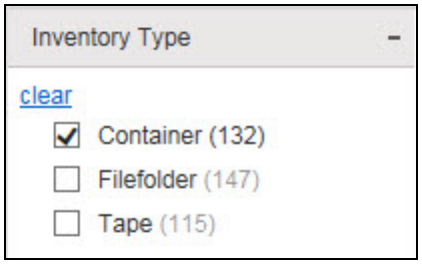


Once a filter is selected, the filter count appears next to each selection. This is the number of items that match the criteria and are included in your results. The **+** and **–** icons can be used to expand or collapse the accounts.

The **Check all** and **Uncheck all** icons can be used to select or unselect all subaccounts under the main account.

Inventory Type

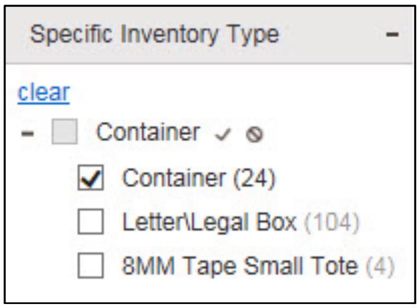
Select the check box for the type of item you want.



Specific Inventory Type

This filter displays all available sub-types of the Inventory Type selected. If Container is the only Inventory Type selected, then only Container sub-types will be displayed here.

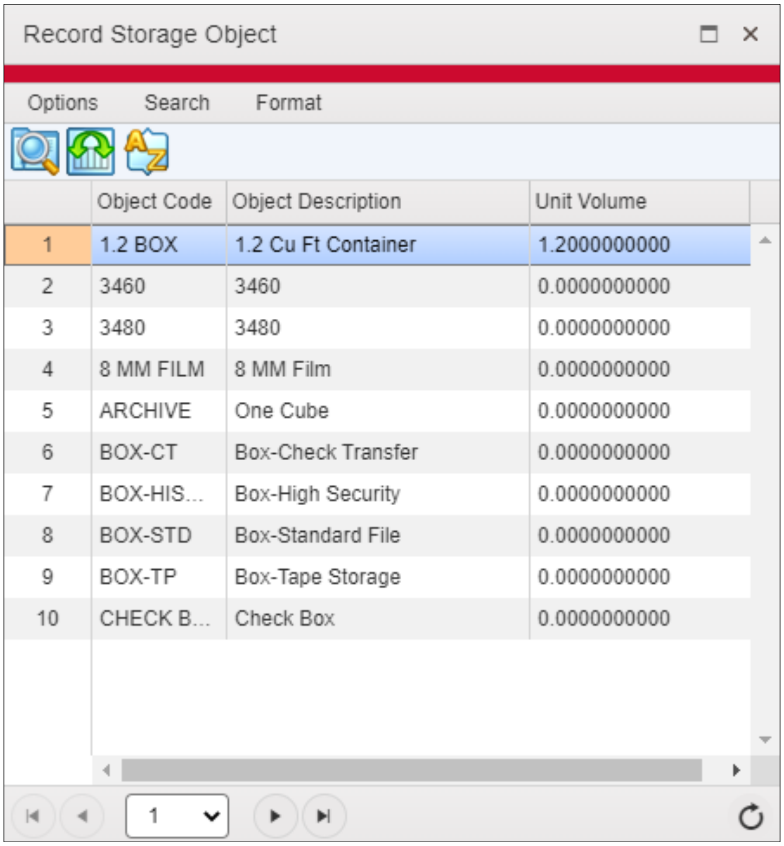
When no filters have been selected and no search text has been entered, this panel will not display.



Specific Inventory Type Manual

This filter lets you manually select the Specific Inventory Type you want.

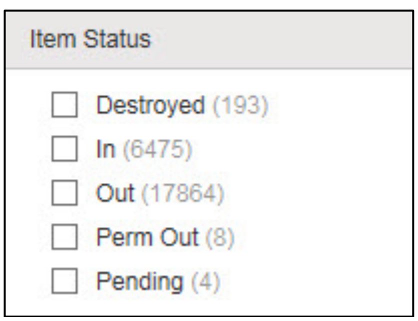
Click the grid picker to display the **Object** grid.



Right click on the object type you want and click **OK**.

Item Status

Select from the available item statuses.



Destroyed: A status of Destroyed means the item has been destroyed and no longer exists.

In: A status of In means the item is at the record center.

Out: A status of Out means the item is at the customer site.

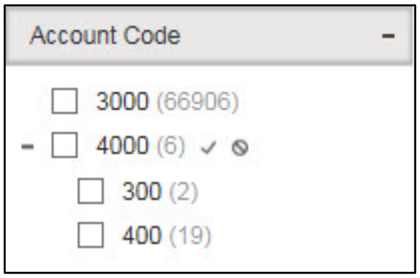
Perm Out: A status of Perm Out means the item was returned to the customer and will not be coming back to the record center.

Pending: A status of Pending means the item was added by the customer via O'Neil Order, but has not yet been accepted by the record center.

Account Code

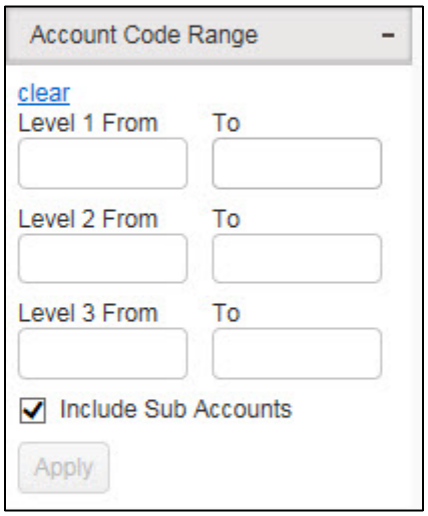
Select from the available accounts/sub accounts. Only accounts that you have access to are displayed.

When no filters have been selected and no search text has been entered, this panel will not display.



Account Code Range

To search for items belonging to more than one account at a time, you can enter a range of accounts.

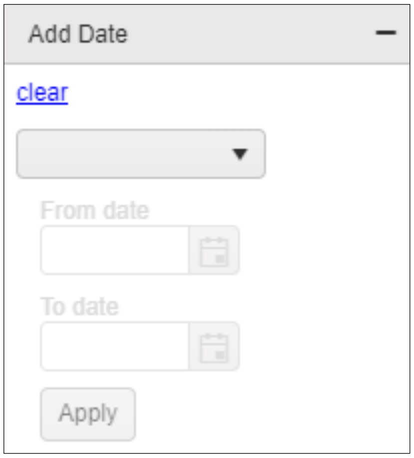


Select the *Include Sub Accounts* check box if you want to include all sub accounts for the account range you entered.

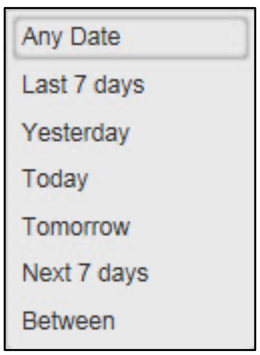
Click **Apply** to include the account code range in your search.

Add Date

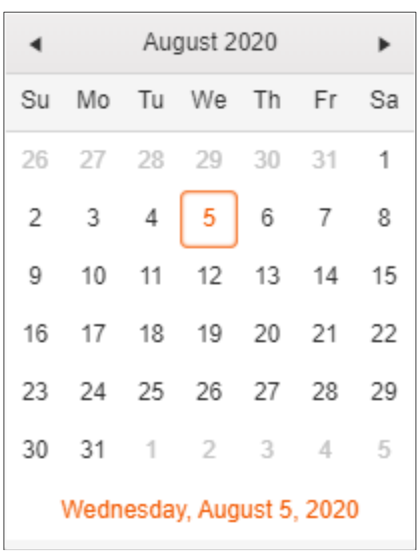
Add date is the date an item was added to the database. To include an Add Date in your search, click the drop down arrow in the top field.



Select from the available options.



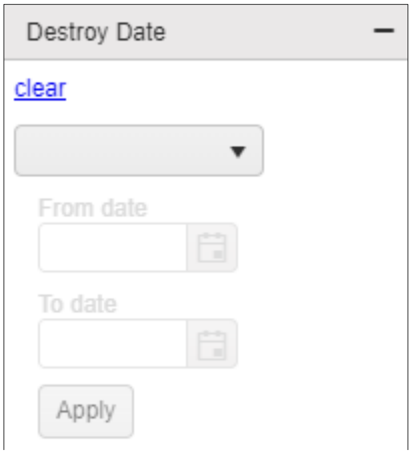
If you select Between, you will need to enter a From/To date. Type in a date, or click the grid picker next to the field to select a date. You can select just a From date or just a To date. It is not necessary to enter both.



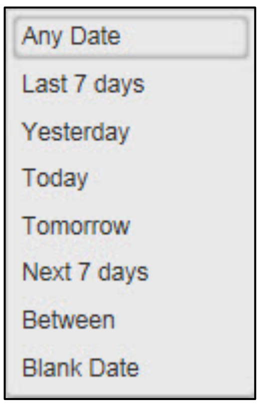
Once you have entered your dates, click **Apply**.

Destroy Date

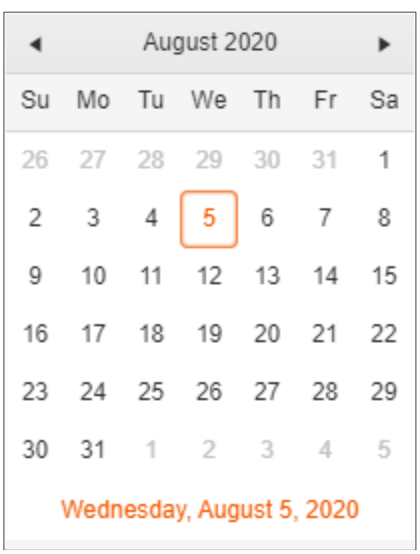
Destroy date is the date an item is scheduled to be destroyed, or was already destroyed. To include a Destroy Date in your search, click the drop down arrow in the top field.



Select from the available options.



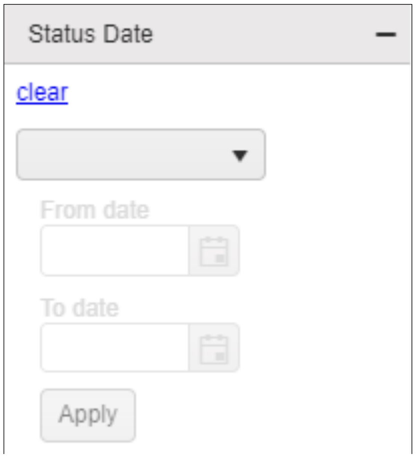
If you select Between, you will need to enter a From/To date. Type in a date, or click the grid picker next to the field to select a date. You can select just a From date or just a To date. It is not necessary to enter both.



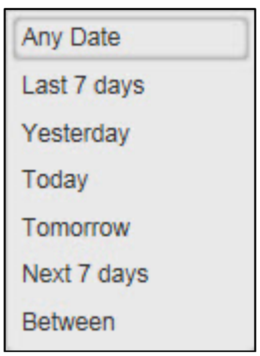
Once you have entered your dates, click **Apply**.

Status Date

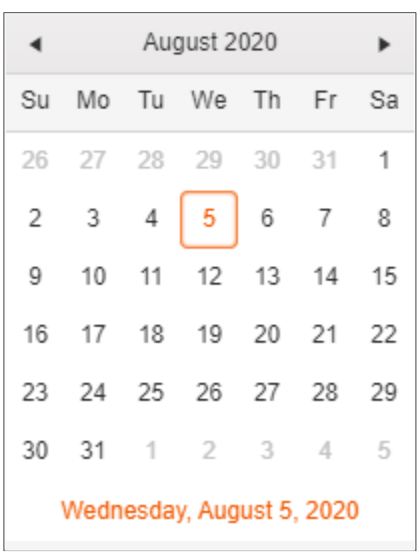
Status date is the date the last action took place for the item. For example, it could be when the item was scanned into the record center, or scanned out to a customer. To include a Status Date in your search, click the drop down arrow in the top field.



Select from the available options.



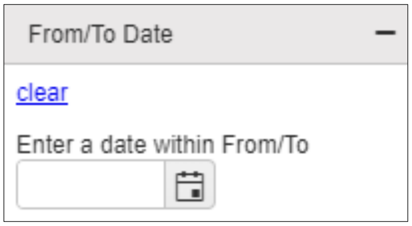
If you select Between, you will need to enter a From/To date. Type in a date, or click the grid picker next to the field to select a date. You can select just a From date or just a To date. It is not necessary to enter both.



Once you have entered your dates, click **Apply**.

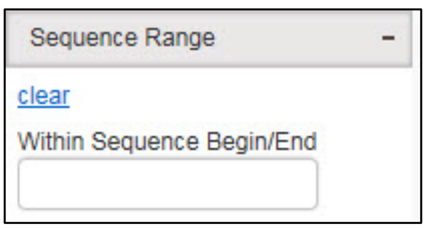
From/To Date

The From/To Date is information you provided to the record center to help identify an item. For example, if you have a container of medical records for 2013, the From/To Date might be " From:1/1/13 To 12/31/13" To enter a date that falls within the From/To Date Range for an item, type a date or click the grid picker to select a date.



Sequence Range

The Sequence Range is information you provided to the record center to help identify an item. For example, if you have a container of personnel files, the sequence might be "From: ABERCROMBIE To: CRAWFORD. You can enter text that falls within the Sequence Begin/End range for the item. So for the example given, if you were looking for a personnel file for BROWN, you can type that here and the container listed above would be included in the results.



Perm Flag

Perm Flag is a field that indicates whether an item is to exist indefinitely and should never be destroyed. Select whether you want to search for items with a Perm Flag of No or Yes.

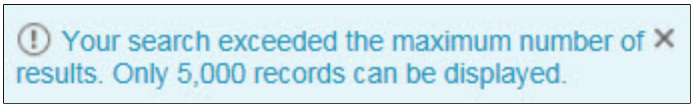
Clear Filters

Each filter section has a **Clear** link that clears that specific filter. The results in the grid will be updated to reflect the cleared filter.

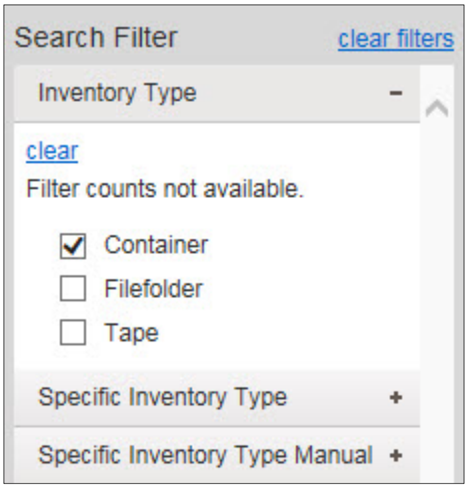
At the top of the Search Filter section is a **Clear Filters** link that clears all filters. All results displayed in the grid that are based on the filters will be cleared.

Result Limit Exceeded

A maximum of 5,000 items can be displayed in the results grid. If your search returns more than 5,000 items, you are informed and only the first 5,000 records are added to the grid. To close the message, click the **X** in the corner.



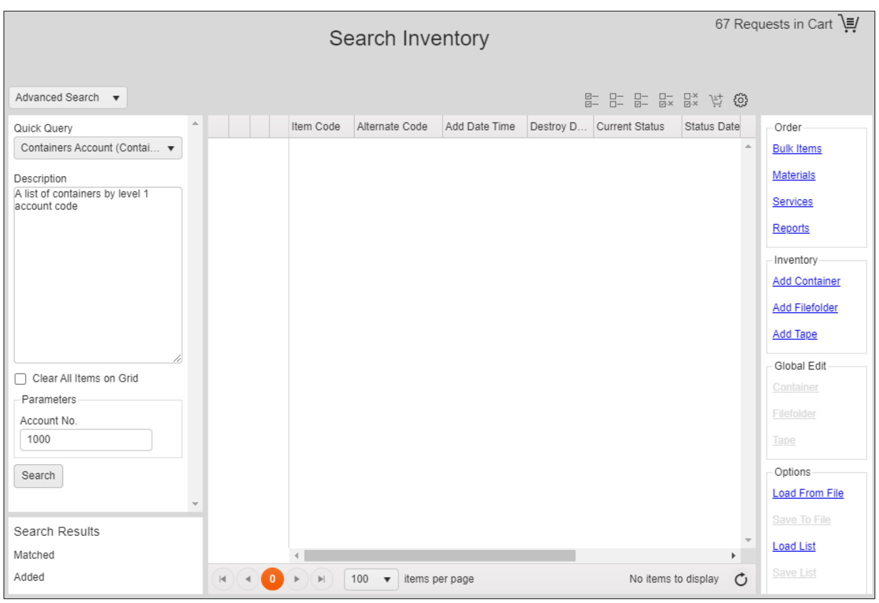
Filter counts will not be available until you apply additional filters to narrow the results. Any time filter counts are not available, a note is included in the Search Filter section.



Advanced Search

Advanced Search displays the Quick Query panel.

NOTE: Quick queries are set up by your record center and then assigned to you. If no quick queries have been assigned, the Quick Query panel does not display.



Quick Query: The drop down list displays the name of all quick queries that have been assigned to you by the record center. The list is sorted by the quick query name in ascending order. The last used quick query is selected by default. If the quick query was created specifically for the container, filefolder or tape grids, that is specified in parenthesis after the quick query name. That means that quick query will only returns items of that type. If there are no parenthesis, the query will return all item types you have access to.

Description: This is the short description your record center has given the quick query.

Clear All Items on Grid: When selected, the grid is cleared before the quick query is executed. When not selected, new items are appended to the grid, which allows you to accumulate results using multiple quick queries.

Parameters: If the quick query has parameters, there will be a field for you to enter them. This may be a text box, date/time picker, etc. The last used parameters are populated by default.

Click **Search** to run the query.

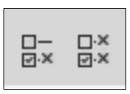
NOTE: If you add a container, filefolder, or tape while in the Advanced Search mode, the row is added to the grid.

Search Results

A search results panel displays the number of records that were matched and added by the last quick query search. Any modification to the results will clear these numbers until the next quick query search is run.

Icons

Two additional icons are displayed in the Advanced Search mode.

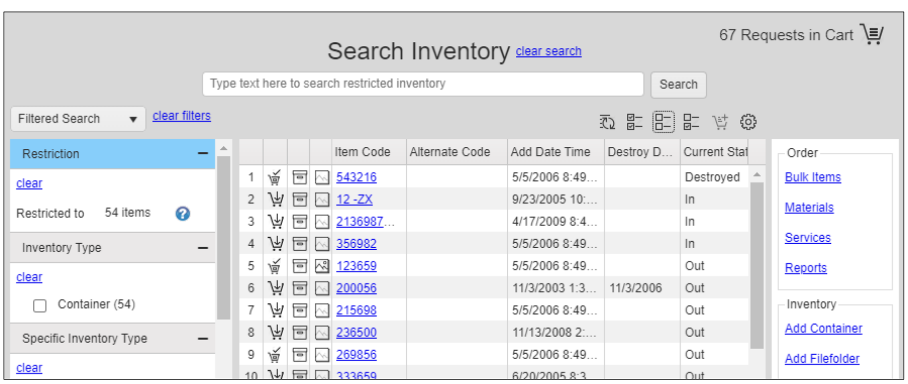


Clear Selected: removes all selected items from the grid.

Clear All: removes all items from the grid.

Switch from Advanced to Filtered Mode

If you run a quick query under Advanced Search, and then switch to Filtered Search, the grid remains populated with the results. The Filtered Search mode is restricted to consider only the items that were identified by the Advanced Search mode. That means any additional filters chosen, including a text search, will be applied to the restricted set of items.



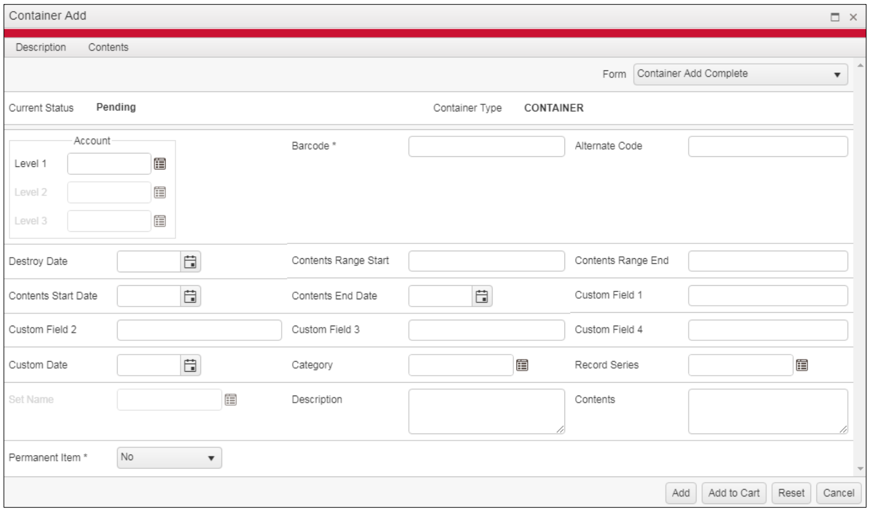
A Restriction panel is displayed at the top of the Search Filters panel. It indicates the number of items from the last Advanced Search that the results are restricted to. The panel title is blue to bring attention to it. A **Help** icon is also included. Hover over the icon to display a message explaining the restriction.

The **Search** button next to the full text search box also indicates that the search is restricted.

Add Container

New containers can be added to your account using O'Neil Order. Once information is entered and submitted, it is added to the database at the record center.

To add a new container, click **Add Container** under Tasks on the right side of the screen. You can also right click on the grid and from the context menu, select **Add Container**.

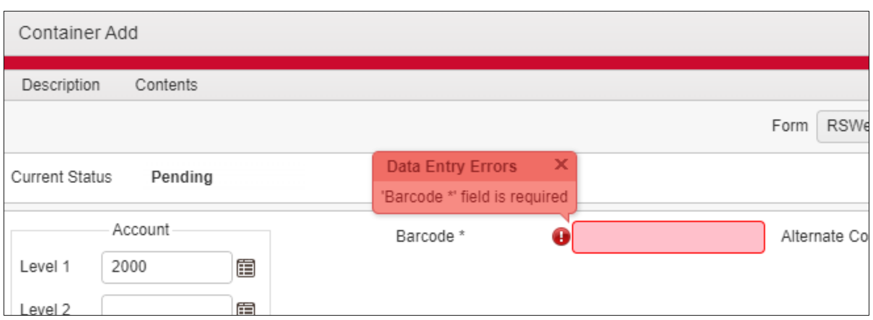


Your record center may have created custom data entry forms for you. To view available forms, click the Form drop down list and make your selection. The default is automatically set to the last form you opened.

Enter your data in the appropriate fields. Click the grid picker next to a field to display a list of available options. Right click on your selection in the grid and select **OK**.

Click the date picker next to date fields to display a calendar from which you can select a date.

Some fields are required. If you try to add the record without completing a required field, the field is displayed in red. Click the exclamation point icon for an explanation.



Click the **X** to close the message.

Once you have completed all fields, click **Add** to add the container to the database. If you want to add the container and immediately place it in your cart, click **Add to Cart**.

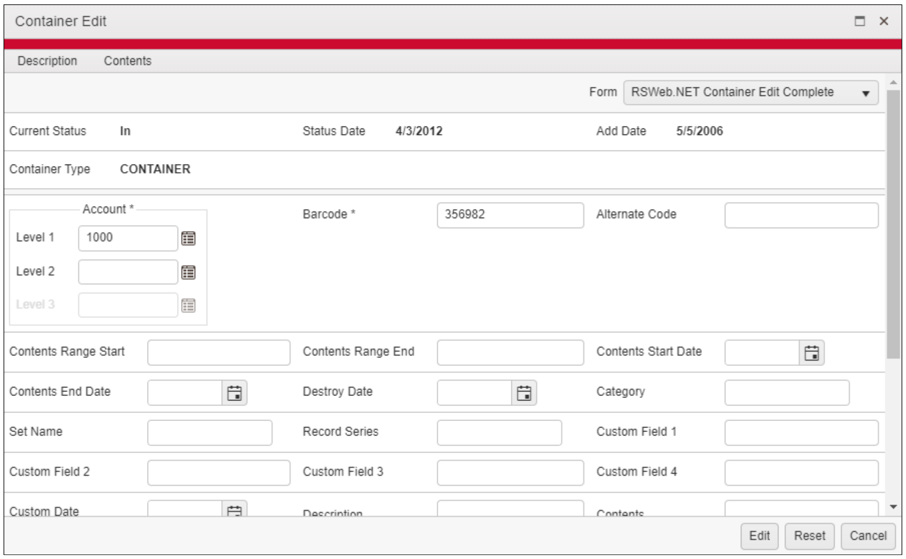
Continue adding any additional containers. When you have finished entering data, click **Cancel** to return to the **Results** grid.

Edit Existing Containers

Data for existing containers can be edited using O'Neil Order. Once data is edited or added and submitted, it is changed in the database at the record center.

To edit data for a container, you must first load the container onto the grid. Once the container is loaded, right click on it and from the context menu, select **Edit**.

NOTE: You can also bring up the **Edit** form by clicking on the item's barcode link in the grid.



Make your changes or enter new data in the appropriate fields. Click the grid picker next to a field to display a list of available options. Right click on your selection in the grid and select **OK**.

Click the date picker next to date fields to display a calendar from which you can select a date.

Some fields are required. If you try to edit the record without completing a required field, the field is displayed in red. Click the exclamation point icon for an explanation.

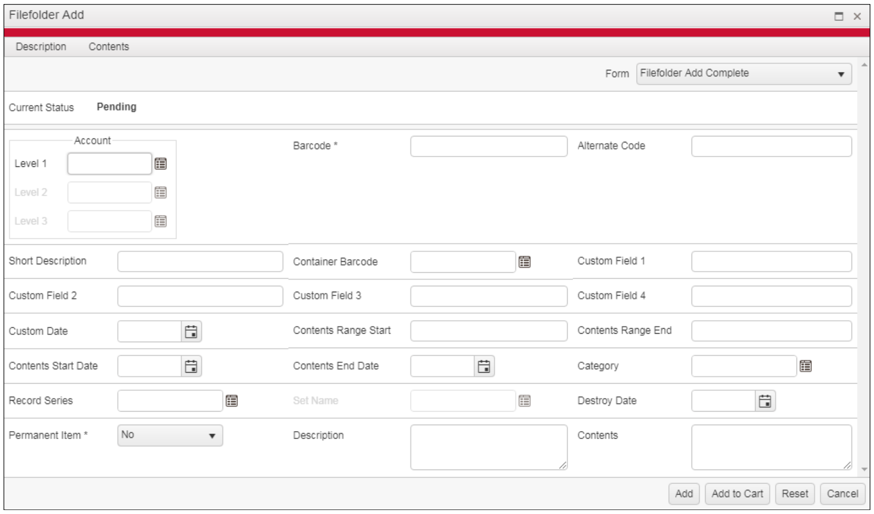
Once you have completed the fields, click **Edit**.

Continue making necessary changes to any other containers. The changes you have entered are sent to the database at the record center.

Add Filefolder

New filefolders can be added to your account using O'Neil Order. Once information is entered and submitted, it is added to the database at the record center.

To add a new filefolder, click **Add Filefolder** under Tasks on the right side of the screen.

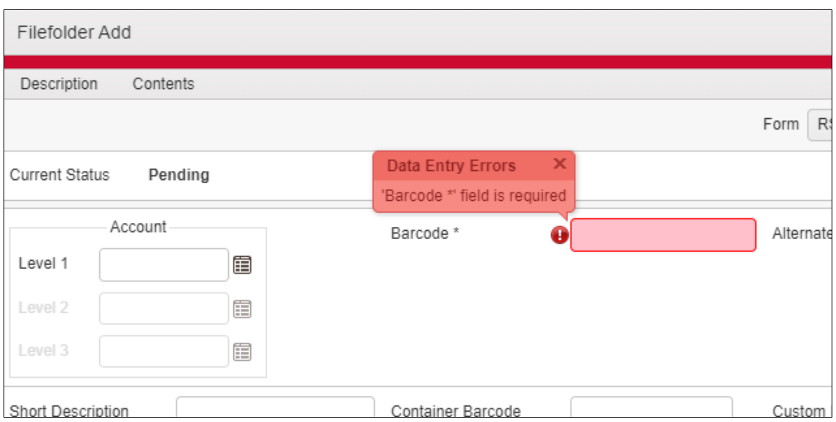


Your record center may have created custom data entry forms for you. To view available forms, click the Form drop down list and make your selection. The default is automatically set to the last form you opened.

Enter your data in the appropriate fields. Click the grid picker next to a field to display a list of available options. Right click on your selection in the grid and select **OK**.

Click the date picker next to date fields to display a calendar from which you can select a date.

Some fields are required. If you try to add the record without completing a required field, the field is displayed in red. Click the exclamation point icon for an explanation.



Once you have completed all fields, click **Add** to add the filefolder to the database. If you want to add the filefolder and immediately place it in your cart, click **Add to Cart**.

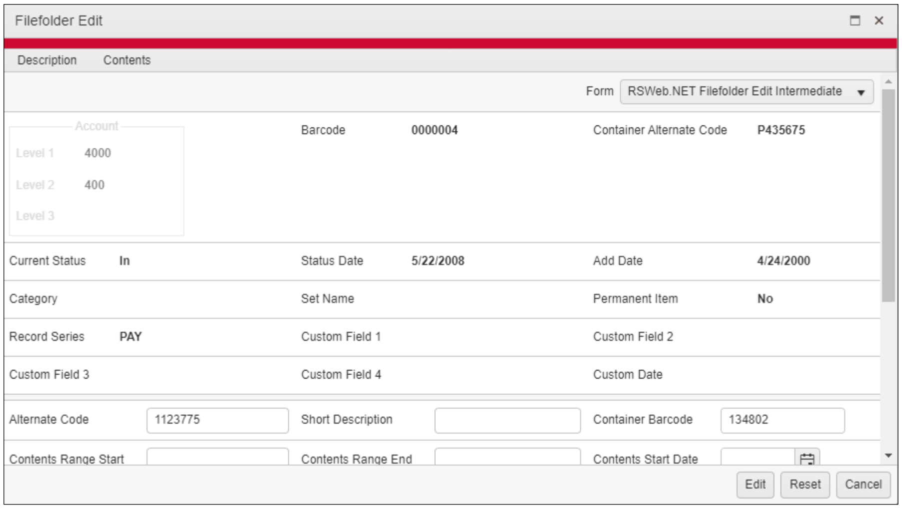
Continue adding any additional filefolders. When you have finished entering data, click **Cancel** to return to the **Inventory** grid.

Edit Existing Filefolders

Data for existing filefolders can be edited using O'Neil Order. Once data is edited or added and submitted, it is changed in the database at the record center.

To edit data for a filefolder, you must first load the filefolder onto the grid. Once the filefolder is loaded, right click on it and from the context menu, select **Edit**.

NOTE: You can also bring up the **Edit** form by clicking on the item's barcode link in the grid.



Make your changes or enter new data in the appropriate fields. Click the grid picker next to a field to display a list of available options. Right click on your selection in the grid and select **OK**.

Click the date picker next to date fields to display a calendar from which you can select a date.

Some fields are required. If you try to edit the record without completing a required field, the field is displayed in red. Click the exclamation point icon for an explanation.

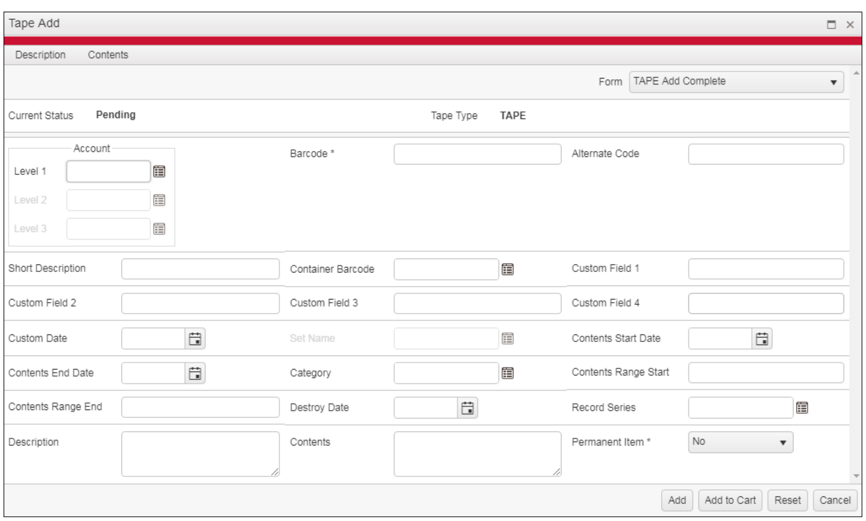
Once you have completed the fields, click **Edit**.

Continue making necessary changes to any other filefolders. The changes you have entered are sent to the database at the record center.

Add Tape

New tapes can be added to your account using O'Neil Order. Once information is entered and submitted, it is added to the database at the record center.

To add a new tape, click **Add Tape** under Tasks on the right side of the screen.

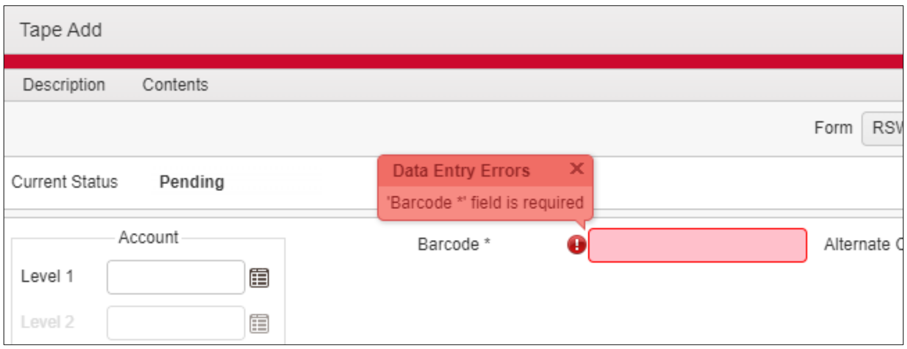


Your record center may have created custom data entry forms for you. To view available forms, click the Form drop down list and make your selection. The default is automatically set to the last form you opened.

Enter your data in the appropriate fields. Click the grid picker next to a field to display a list of available options. Right click on your selection in the grid and select **OK**.

Click the date picker next to date fields to display a calendar from which you can select a date.

Some fields are required. If you try to add the record without completing a required field, the field is displayed in red. Click the exclamation point icon for an explanation.



Once you have completed all fields, click **Add** to add the tape to the database. If you want to add the tape and immediately place it in your cart, click **Add to Cart**.

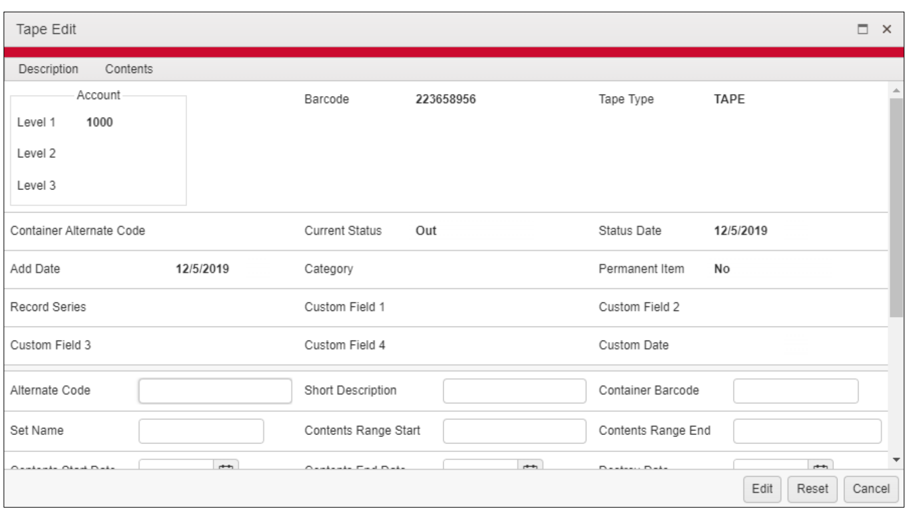
Continue adding any additional tapes. When you have finished entering data, click **Cancel** to return to the **Inventory** grid.

Edit Existing Tapes

Data for existing tapes can be edited using O'Neil Order. Once data is edited or added and submitted, it is changed in the database at the record center.

To edit data for a tape, you must first load the tape onto the grid. Once the tape is loaded, right click on it and from the context menu, select **Edit**.

NOTE: You can also bring up the **Edit** form by clicking on the item's barcode link in the grid.



Make your changes or enter new data in the appropriate fields. Click the grid picker next to a field to display a list of available options. Right click on your selection in the grid and select **OK**.

Click the date picker next to date fields to display a calendar from which you can select a date.

Some fields are required. If you try to edit the record without completing a required field, the field is displayed in red. Click the exclamation point icon for an explanation.

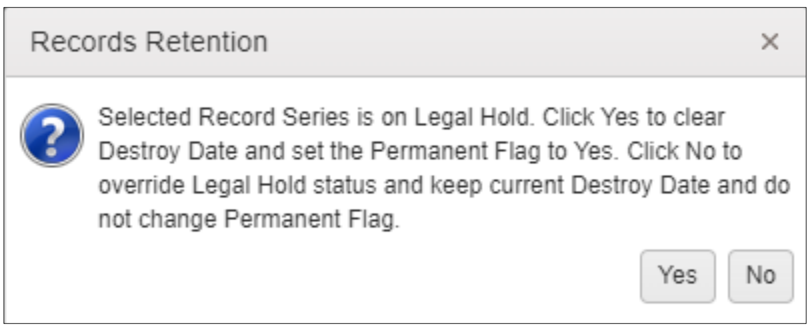
Once you have completed the fields, click **Edit**.

Continue making necessary changes to any other tapes. The changes you have entered are sent to the database at the record center.

Retention Information

When adding/editing an item, after the **Add/Edit** button has been clicked, the retention information related fields are checked to see if the calculated destroy date has changed and whether the record series is on Legal Hold.

If the record series is on Legal Hold and the current Destroy Date is blank and the Permanent Flag is set to Yes, the item is saved without prompting you because nothing changed. If the Destroy Date is not blank or the Permanent Flag is set to No, you receive the following prompt.



Select **Yes** to clear the Destroy Date field and set the Permanent Flag to Yes. The Legal Hold status remains in place.

Select **No**, to keep the Destroy Date and Permanent Flag setting as you entered them for the item. This overrides the Legal Hold status.

If the current Destroy Date is blank and a new Destroy Date has been calculated, the Destroy Date will automatically be updated with the calculated Destroy Date and the record will be saved without prompting you.

If the current Destroy Date is not blank and the calculated Destroy Date is different from the current one, or if the current Permanent Flag is Yes, you receive the following prompt.

If you select **Yes**, the Destroy Date will be set with the calculated date, and the Permanent Flag will be set to No if necessary.

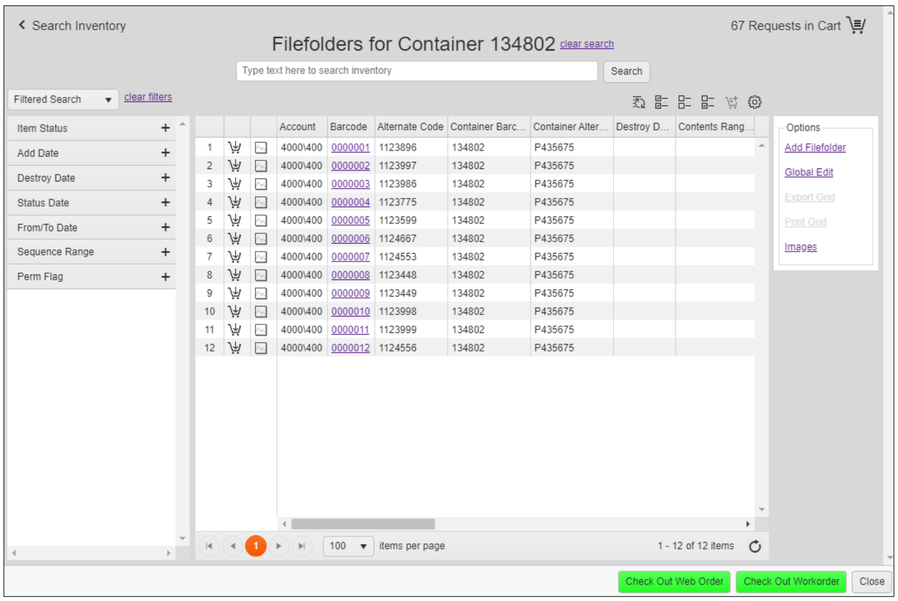
If you select **No**, the record will be saved with the current Destroy Date and Permanent Flag setting.

Filefolders/Tapes in Container

A **Filefolders** or **Tapes** grid is available through context menu options in the **Inventory** grid. This allows you to view the filefolders or tapes in a container on the grid. Right click on an item in the **Inventory** grid and select one of the following:

- View Item Filefolders
- View Item Tapes
- View Filefolders for Selected Items
- View Tapes for Selected Items

These grids have all of the same features as the **Inventory** grid but will only show the filefolders or tapes that are in either the current container or selected containers in the **Inventory** grid.

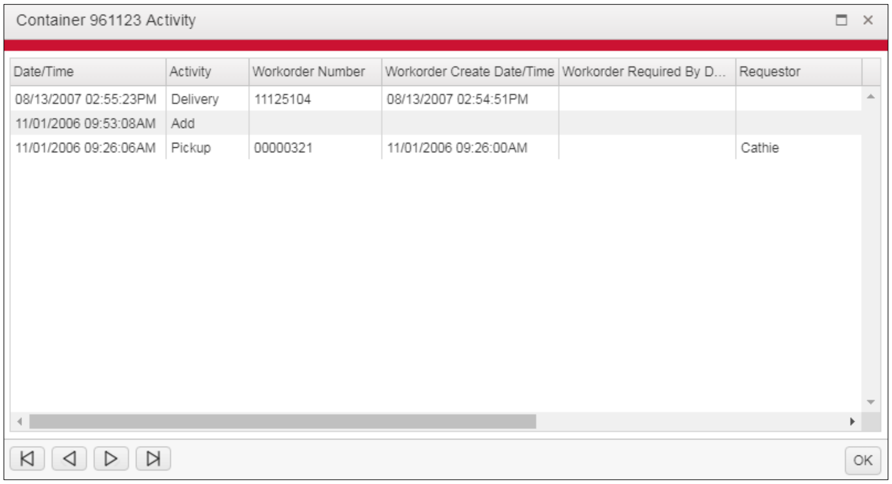


When viewing filefolders/tapes for a single container, you cannot edit the contained-in container. The Container and Account fields are populated and grayed out when the dialog box opens. When adding, you can only add to the container you are viewing the filefolders/tapes for.

When viewing filefolders/tapes for multiple containers, you can Add/Edit/Global Edit the Contained In, Account, and Location fields to any of the containers that were selected in the **Inventory** grid.

View Item Activity

You can view all activity for an item from the **Inventory** grid. Right click on an item in the grid and select **View Item Activity**.



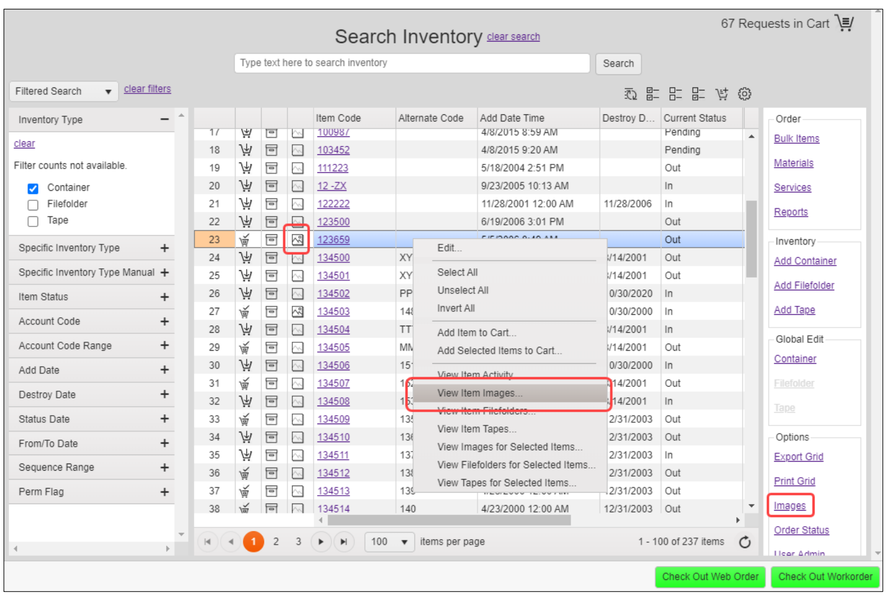
NOTE: Item activity is sorted by Date/Time in descending order and up to 20 records of activity are displayed.

The arrows at the bottom left of the grid navigate through additional items on the **Inventory** grid.

To close the **Activity** grid, click **OK**.

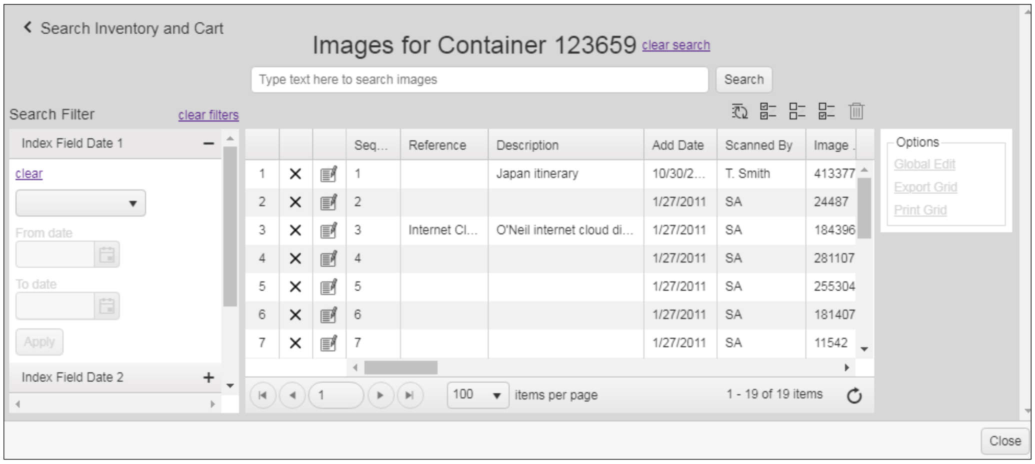
Images

An image of the contents of a container or filefolder can be scanned and stored in the database for viewing in O'Neil Order. Images can be viewed from the **Search Inventory** grid or by using the **Images** option.



View Images from Search Inventory Grid

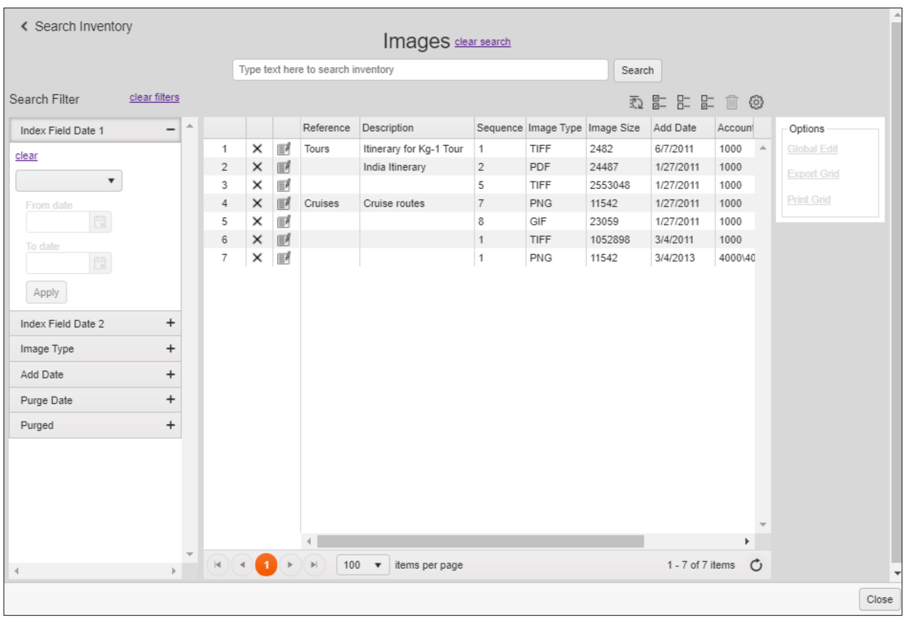
To view all images related to a container or filefolder that has been loaded into the **Search Inventory** grid, click the View Item Images icon, or right click on the item and from the context menu select **View Item Images**.



All images for the container or filefolder are listed. To view the image or edit the image record, click the Edit Image icon or right click on the image and from the context menu, select **Edit**. See *Edit/View* section below for more information.

View Images from Images Option

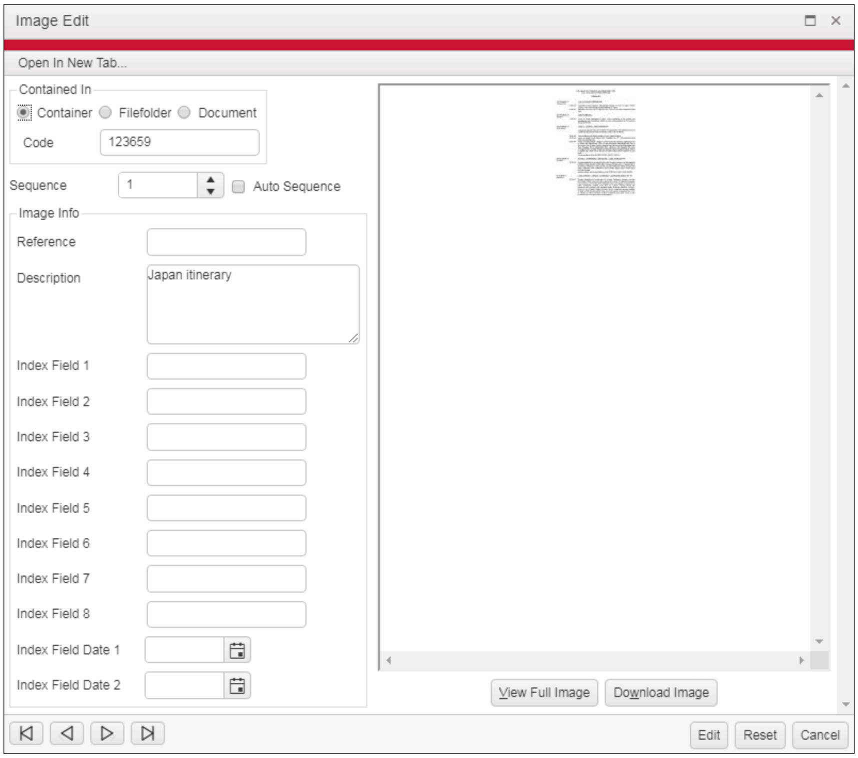
The **Images** grid allows you to view images for multiple containers or filefolders. To view an existing image, click **Images** in the **Options** section on the right side of the screen.



Search for the images you want to view. To view the image or edit the image record, click the Edit Image icon or right click on the image and from the context menu, select **Edit**. See *Edit/View* section below for more information.

Edit/View

The **Edit** menu allows you to view an image and edit certain information regarding the image. You cannot, however, edit the image itself. Right click on the image you want to view or edit and from the context menu, select **Edit**. You can also click the **Edit** icon in the grid.



Contained-in: You can change the contained-in location of an image. Select Container, Filefolder, or Document (the document must be in a valid container or filefolder) and enter the Code.

Sequence: Sequence is used to identify what order multiple images appear in.

Auto Sequence: Select this check box if you want the system to automatically increment the sequence as images are added.

Reference: This field allows you to type some sort of identifier that can help group a set of images together.

Description: This is a description of the image.

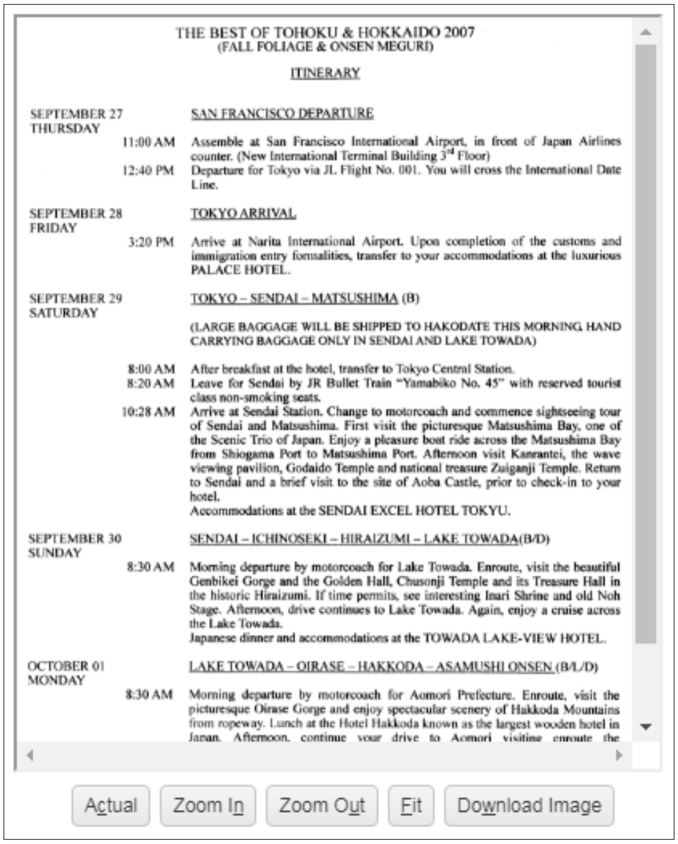
User Defined Fields: Text of your choice can be entered in the user defined fields. There are eight text fields and two date fields available.

Click **Reset** to reset the displayed data back to its original value before any editing was done. Or click **Edit** to save your changes.

View Images

A thumbnail of the image is displayed in the **Image Edit** dialog box. To view the image, click **View Full Image**.

NOTE: You can also open the image in a new tab. To do so, click **Open in New Tab** at the top of the **Image Edit** dialog box.


THE BEST OF TOHOKU & HOKKAIDO 2007
(FALL FOLIAGE & ONSEN MEGURI)

ITINERARY

SEPTEMBER 27 THURSDAY — SAN FRANCISCO DEPARTURE

11:00 AM Assemble at San Francisco International Airport, in front of Japan Airlines counter. (New International Terminal Building 3rd Floor)

12:40 PM Departure for Tokyo via JL Flight No. 001. You will cross the International Date Line.

SEPTEMBER 28 FRIDAY — TOKYO ARRIVAL

3:20 PM Arrive at Narita International Airport. Upon completion of the customs and immigration entry formalities, transfer to your accommodations at the luxurious PALACE HOTEL.

SEPTEMBER 29 SATURDAY — TOKYO – SENDAI – MATSUSHIMA (B)

(LARGE BAGGAGE WILL BE SHIPPED TO HAKODATE THIS MORNING. HAND CARRYING BAGGAGE ONLY IN SENDAI AND LAKE TOWADA)

8:00 AM After breakfast at the hotel, transfer to Tokyo Central Station.

8:20 AM Leave for Sendai by JR Bullet Train "Yamabiko No. 45" with reserved tourist class non-smoking seats.

10:28 AM Arrive at Sendai Station. Change to motorcoach and commence sightseeing tour of Sendai and Matsushima. First visit the picturesque Matsushima Bay, one of the Scenic Trio of Japan. Enjoy a pleasure boat ride across the Matsushima Bay from Shiogama Port to Matsushima Port. Afternoon visit Kanrantei, the wave viewing pavilion, Godaido Temple and national treasure Zuiganji Temple. Return to Sendai and a brief visit to the site of Aoba Castle, prior to check-in to your hotel.
Accommodations at the SENDAI EXCEL HOTEL TOKYU.

SEPTEMBER 30 SUNDAY — SENDAI – ICHINOSEKI – HIRAIZUMI – LAKE TOWADA(B/D)

8:30 AM Morning departure by motorcoach for Lake Towada. Enroute, visit the beautiful Genbikei Gorge and the Golden Hall, Chusonji Temple and its Treasure Hall in the historic Hiraizumi. If time permits, see interesting Inari Shrine and old Noh Stage. Afternoon, drive continues to Lake Towada. Again, enjoy a cruise across the Lake Towada.
Japanese dinner and accommodations at the TOWADA LAKE-VIEW HOTEL.

OCTOBER 01 MONDAY — LAKE TOWADA – OIRASE – HAKKODA – ASAMUSHI ONSEN (B/L/D)

8:30 AM Morning departure by motorcoach for Aomori Prefecture. Enroute, visit the picturesque Oirase Gorge and enjoy spectacular scenery of Hakkoda Mountains from ropeway. Lunch at the Hotel Hakkoda known as the largest wooden hotel in Japan. Afternoon, continue your drive to Aomori visiting enroute the

You can then view the image in its actual size, zoom in or out, or resize it to fit in the window. If you prefer, you can use the **Download Image** button to download the image (the context menu in the **Images** grid also includes a **Download Image** option).

The arrow buttons at the bottom of the **Image Edit** dialog box can be used to scroll through all images in the grid.

Keyboard shortcuts

Below are keyboard shortcuts for the buttons in the **Image Edit** dialog box.

Keys	Action
Alt + Shift + v	simulate "View Full Image" button click
Alt + Shift + w	simulate "Download Image" button click
Alt + Shift + c	simulate "Actual" button click
Alt + Shift + n	simulate "Zoom In" button click
Alt + Shift + u	simulate "Zoom Out" button click
Alt + Shift + f	simulate "Fit" button click

Below are keyboard shortcuts for the navigation buttons in the **Image Edit** dialog box.

Keys	Action
Alt + Shift + 7	simulate "Move First" button click

Alt + Shift + 8	simulate "Move Previous" button click
Alt + Shift + 9	simulate "Move Next" button click
Alt + Shift + 0	simulate "Move Last" button click

View a PDF File

If the image is a PDF, there will not be a preview of the image. A PDF icon appears instead.

Click **View Full Image** to open the image. Click **Download Image** to download the image to your computer.

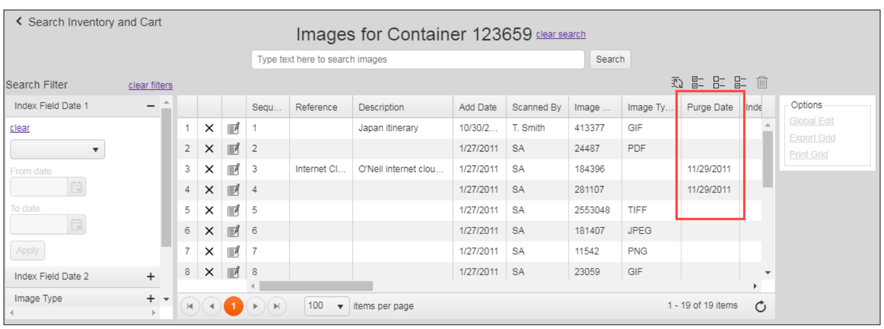
NOTE: You must have Adobe Reader installed to view the image.

View a TIFF File

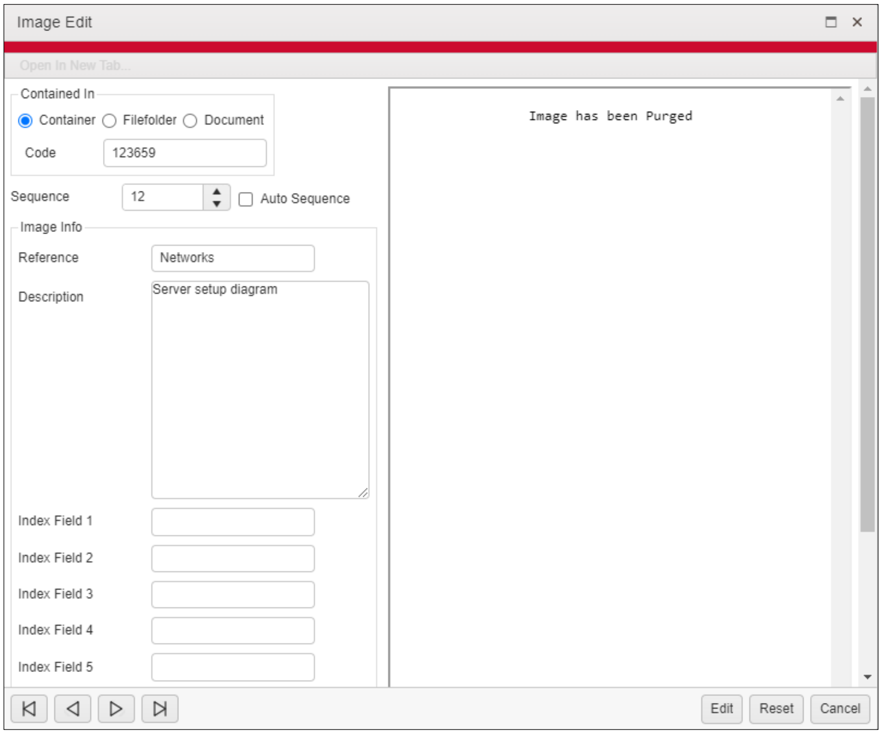
If the image is a TIFF file you will see a preview of the image. You cannot view the image, you can only download it.

View a Purged Image

Purged image records are included when viewing the list of images for a container or filefolder. The Purge Date column is populated.



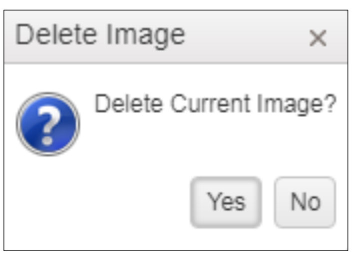
Purged image records can be viewed using **View Image**. You can view information regarding the purged image, but not the image itself.



Click **Cancel** to close the **Image Edit** dialog box.

Delete

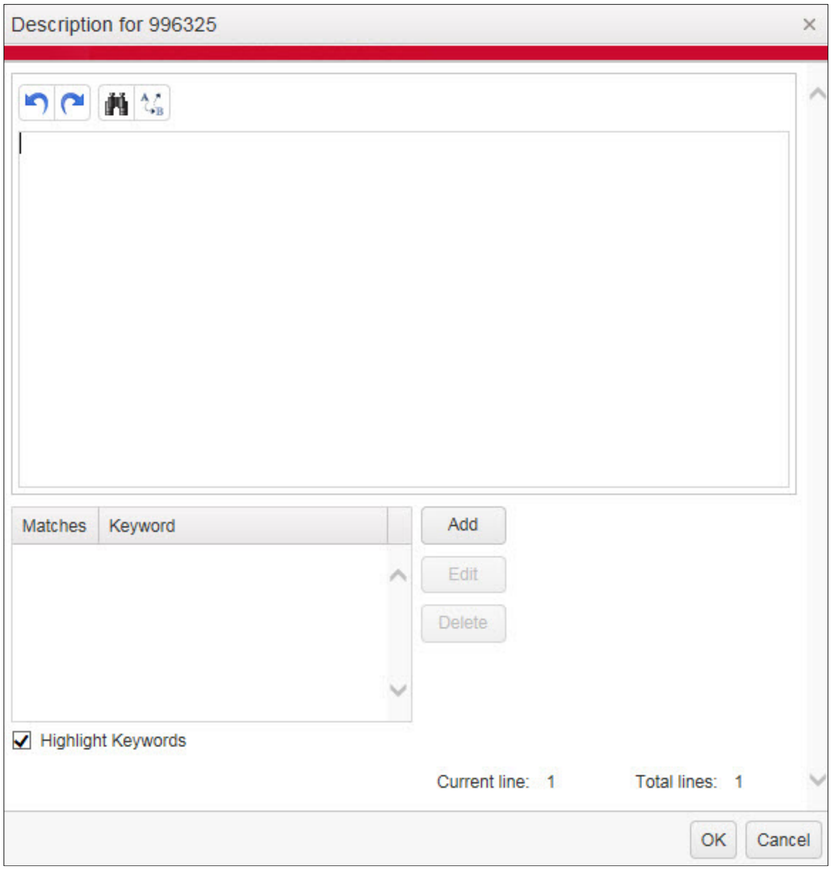
To delete an image, click the Delete Image icon or right click on the image and from the context menu, select **Delete Image**. The following prompt appears.



Click **Yes** to delete the image.

Description

Each item in the system can be given a unique description. To enter the description, in the item's **Add** or **Edit** dialog box, click **Description**.

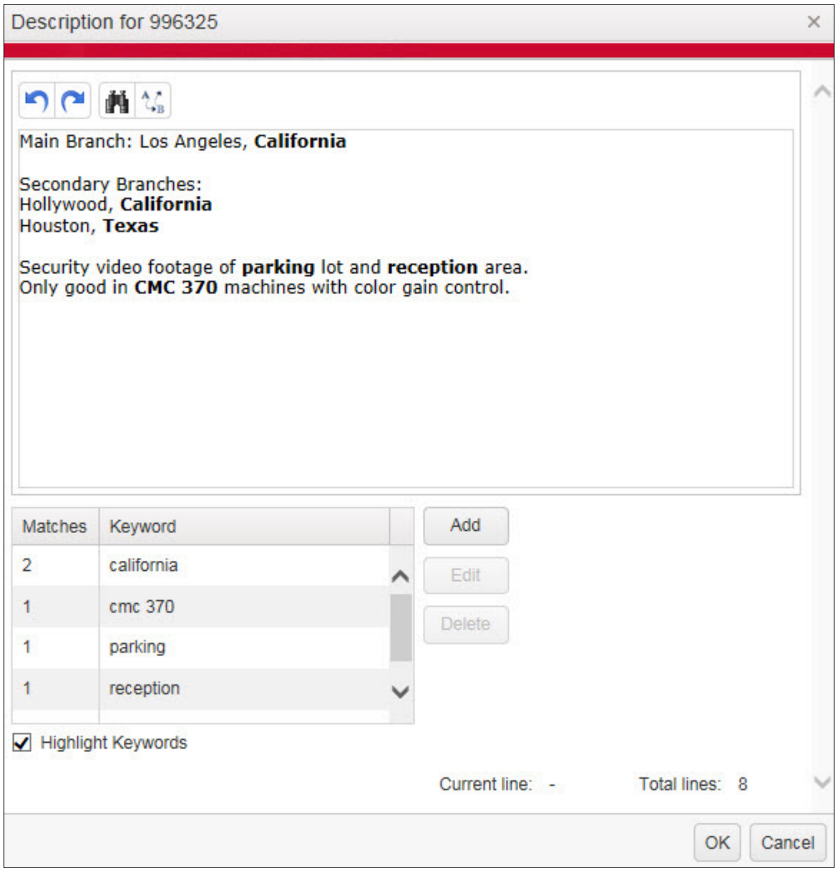


Description text is entered in the top section. The current line being edited and the total number of lines are displayed in the lower right corner.

Keywords

Keywords can be added in the bottom section. Click **Add**.

Type your keyword and click **Add**.

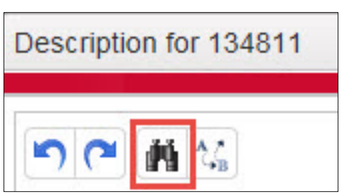


The keyword list includes a count of the number of times the keyword appears within the description text. Keywords do not have to appear in the text. Keywords that do not appear in the text have a zero match count in the keyword list. Existing keywords can be edited or deleted.

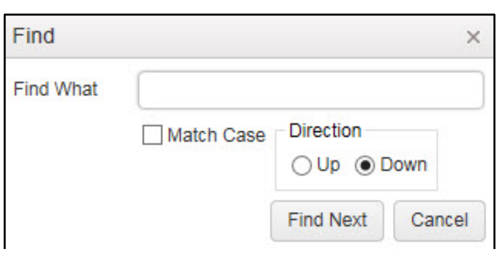
To highlight the keywords in the description text, select the *Highlight Keywords* check box. The keywords appear in bold.

Find

To find text in a description, click the **Find** button.



Enter the text you want to find.

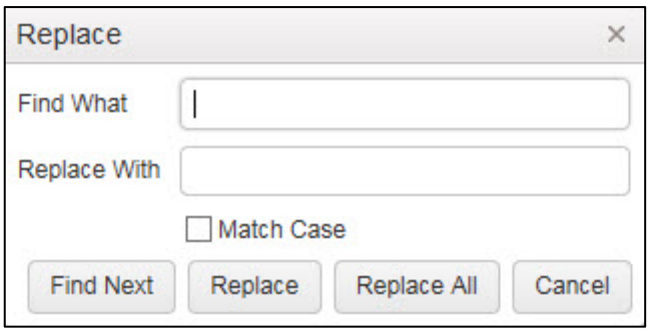


You can choose to match the case of the text and also choose to search up or down. Click **Find Next**. When you have finished, click **Cancel** to close the dialog box.

Find and Replace

To find and replace text in a description, click the **Find and Replace** button.

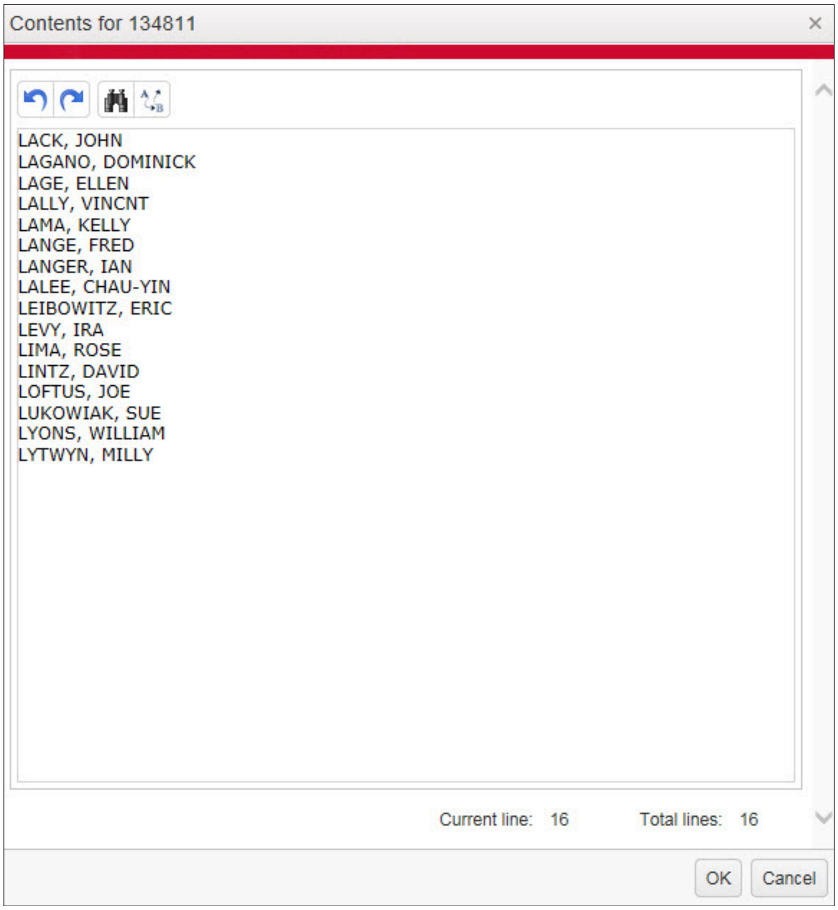
Enter the text you want to find and the text you want to replace it with. You can choose to match the case of the text.



Click **Find Next** to find the first matching text. Click **Replace** to replace it with the new text. You can also click **Replace All** to replace all instances of the text without reviewing them individually. When you have finished, click **Cancel** to close the dialog box.

Contents

In the **Contents** dialog box you can enter the name of each item within another item. For example, you could list the name of each file stored in a container, or list the documents contained in a filefolder. To enter the contents, in the item's **Add** or **Edit** dialog box, click **Contents**.

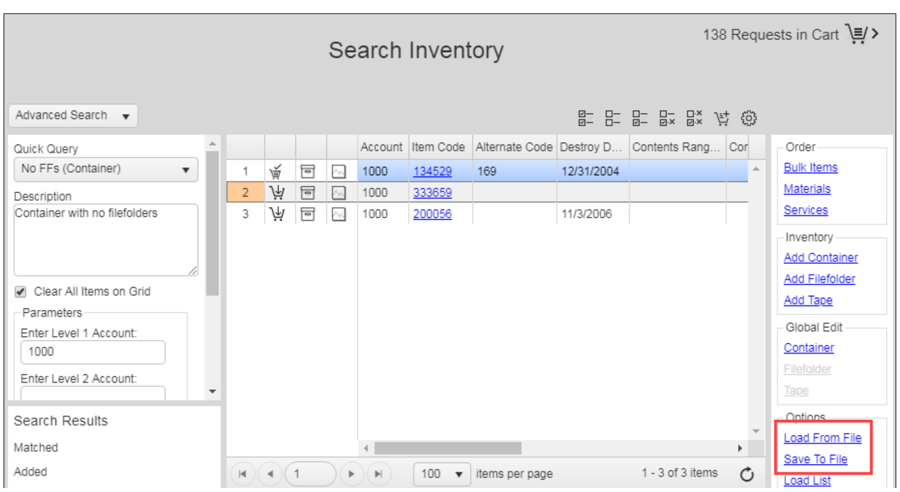


The current line being edited and the total number of lines are displayed in the lower right corner. **Find** and **Find and Replace** buttons are available.

When you have finished, click **OK** to save the contents.

Load From File/Save to File

In the **Search Inventory** grid, when you are in the Advanced Search mode, you have the option to load results from a file and save results to a file.

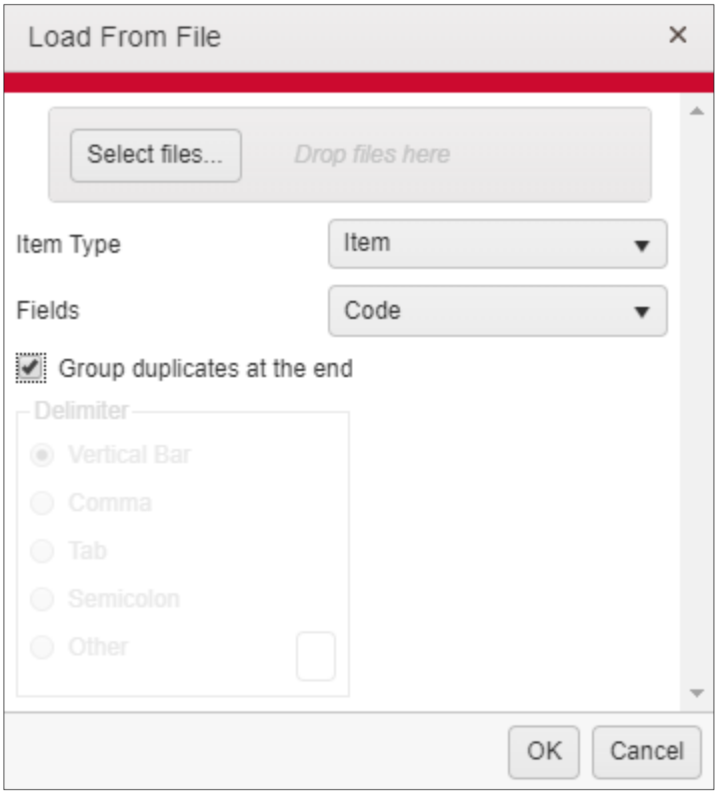


Load from File

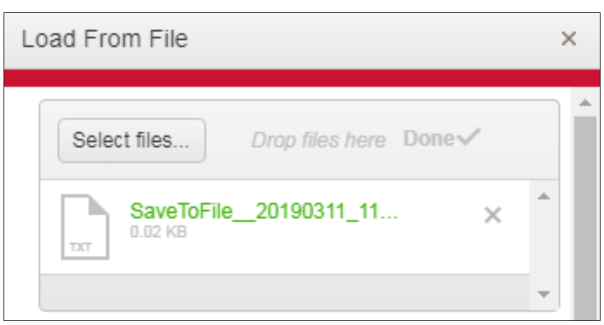
You have the ability to load a list of items from an external text file.

NOTE: The maximum number of upload rows allowed is determined by your record center.

From the **Search Inventory** grid, select **Load from File**.



Select Files: Click to locate and select the file you want to load. You can also drag and drop a file. To delete the file, click the **X** next to the file name.



Item Type: Click the drop down arrow and select the type of item (container, filefolder, tape, item). When a specific type is selected, only that type is loaded from the file. For example, if you select Container, only containers in the file will be loaded. All other item types in the file will display as "item not found". If you select Item, all item types are loaded.

Fields: Click the drop down arrow to select the type of criteria used in your file.

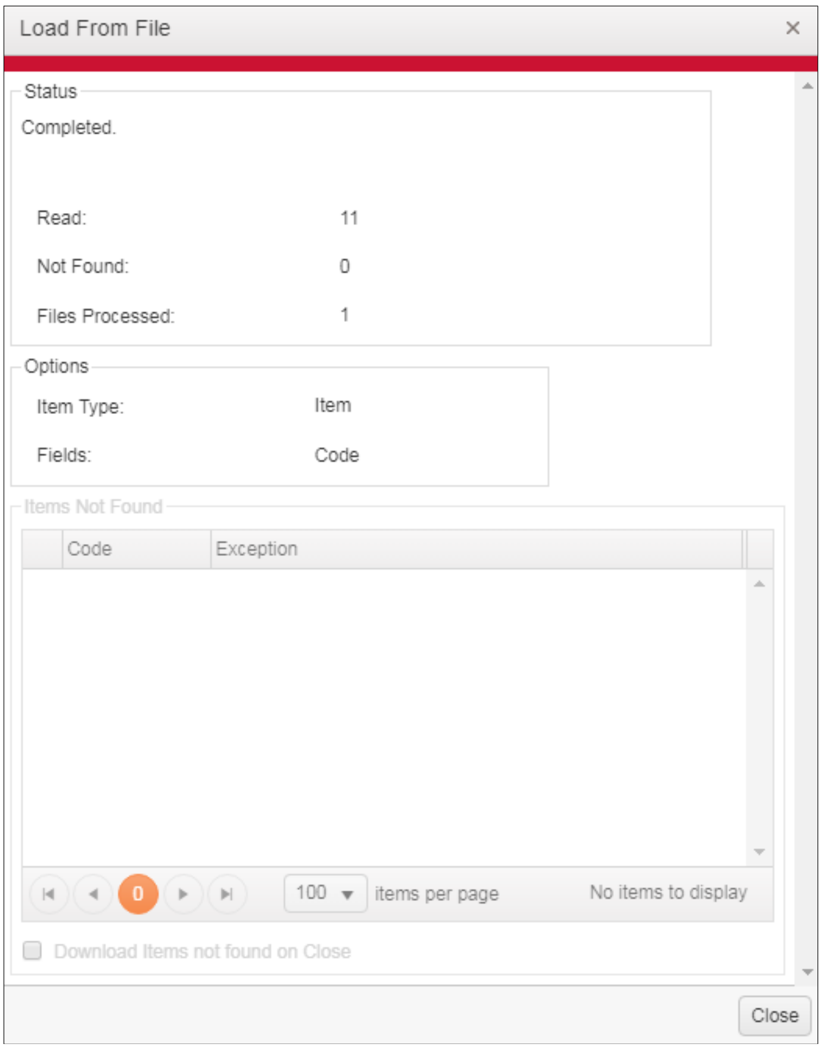
Code
Alternate Code

Alternate Code + Account
Base Object + Code

Group duplicates at the end: When selected, if any items involved in duplicates were already in the grid, they are moved to the end of the grid grouped by either Item Code or Alternate Code. If not selected, any duplicates appear in the results in natural order.

Delimiter: Select the delimiter type. This is what separates the fields of data in your file. This section is only available when you select Alternate Code + Account or Base Object + Code.

Click **OK** to load the file. The **Load From File** dialog box displays indicating if any errors occurred.

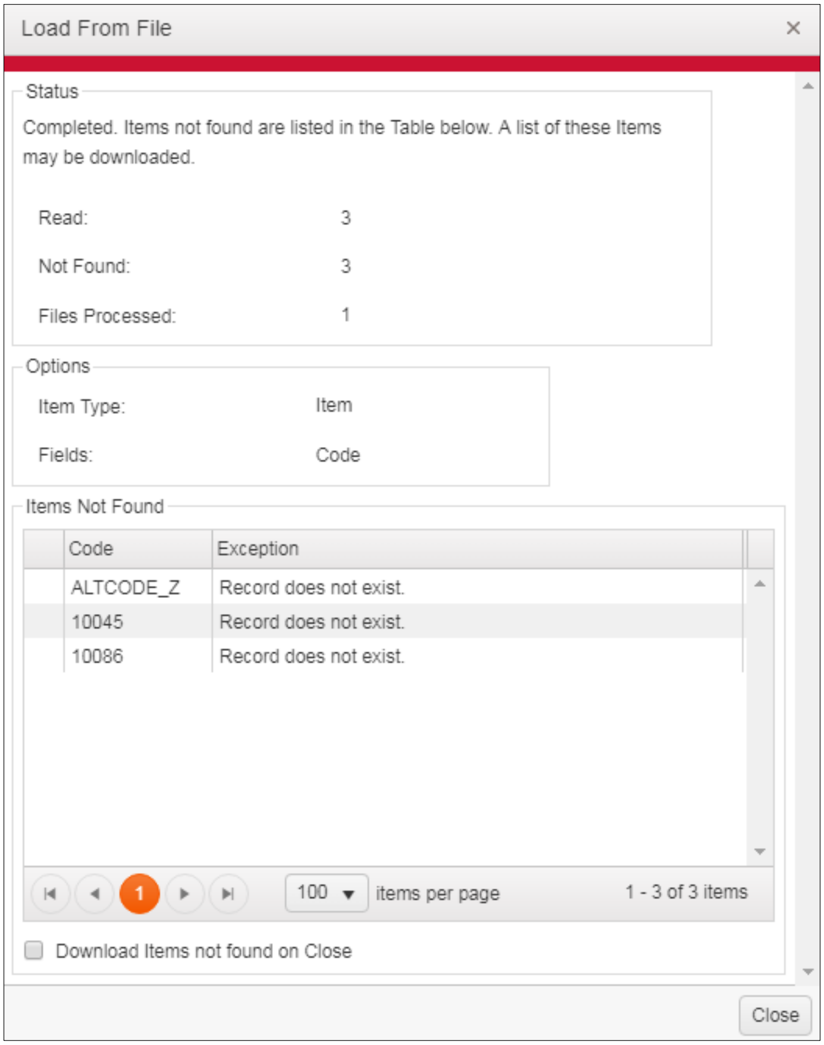


Click **Close** and the matched items are added to the **Search Inventory** grid.

Items Not Found

If any items in your file are not found in the database, they are displayed.

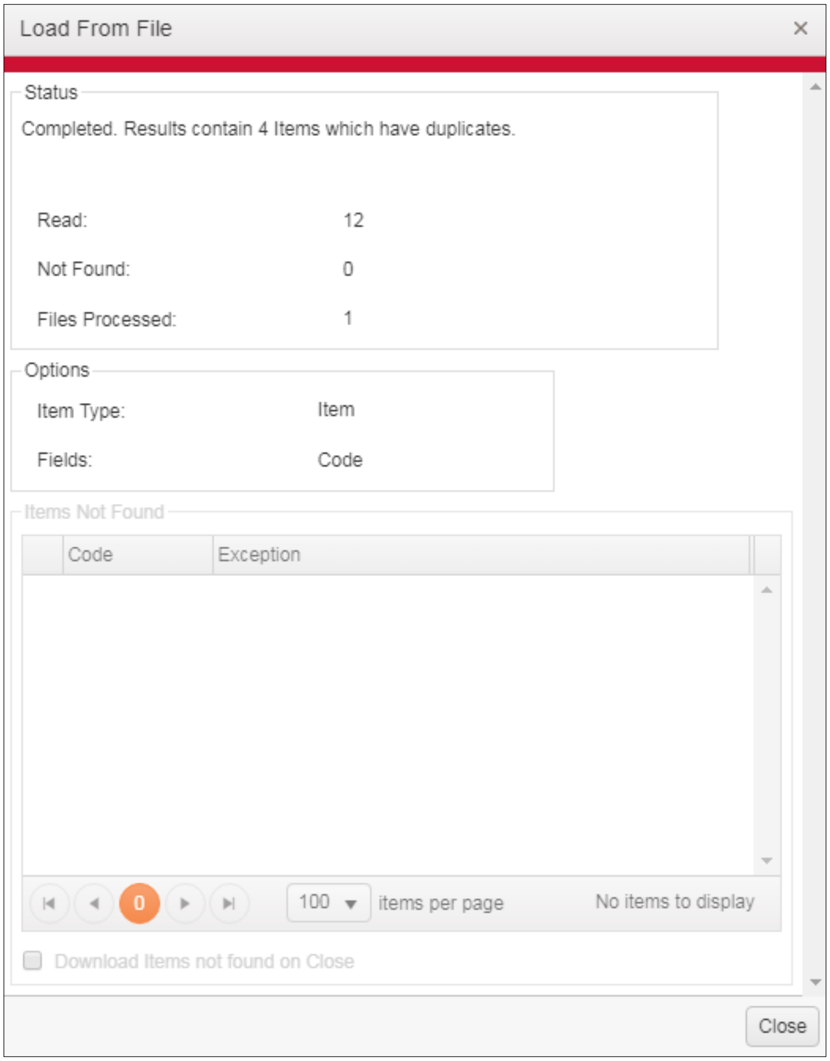
NOTE: No more than 1,000 items will be displayed in the grid.



To save a file with the list of items that were not found, select the *Download Items not found on Close* check box. The text file format is compatible with Load From File so that you can edit it and upload it again using **Load From File**.

Duplicates

You are informed if your file includes any items with duplicate codes.

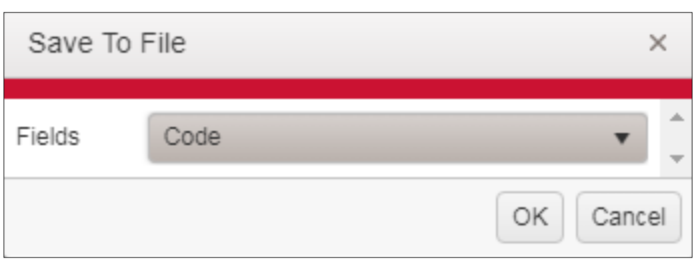


Click **Close** and all items (including the duplicates) are loaded onto the grid.

Save to File

Save to File lets you save items on the grid to a file that you can use again at a later time.

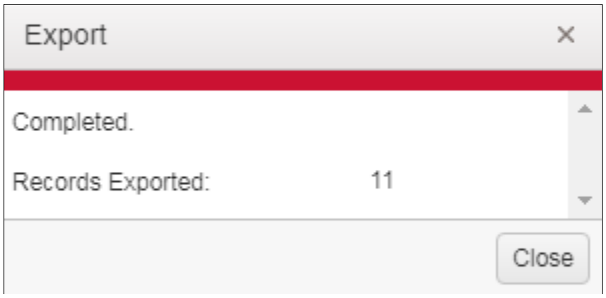
Load items onto the grid. Select **Save To File**.



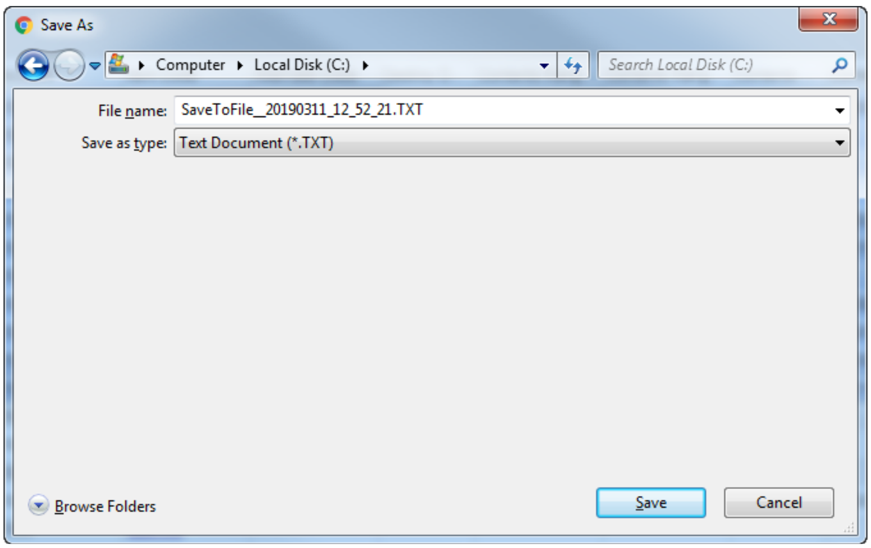
Fields: Click the drop down arrow to select the type of criteria you want to use.

Code
Alternate Code + Account
Base Object + Code

Click **OK** to save the records to a file.



Click **Close**. Select the folder where you want to save your file, and enter a file name.



Click **Save**.

Function Access

The **Load From File** and **Save To File** links are only available if the following function access is set to Yes.

Feature	Permission	Access
Item	Load From File	Yes
Item	Save To File	Yes

Save List/Load List

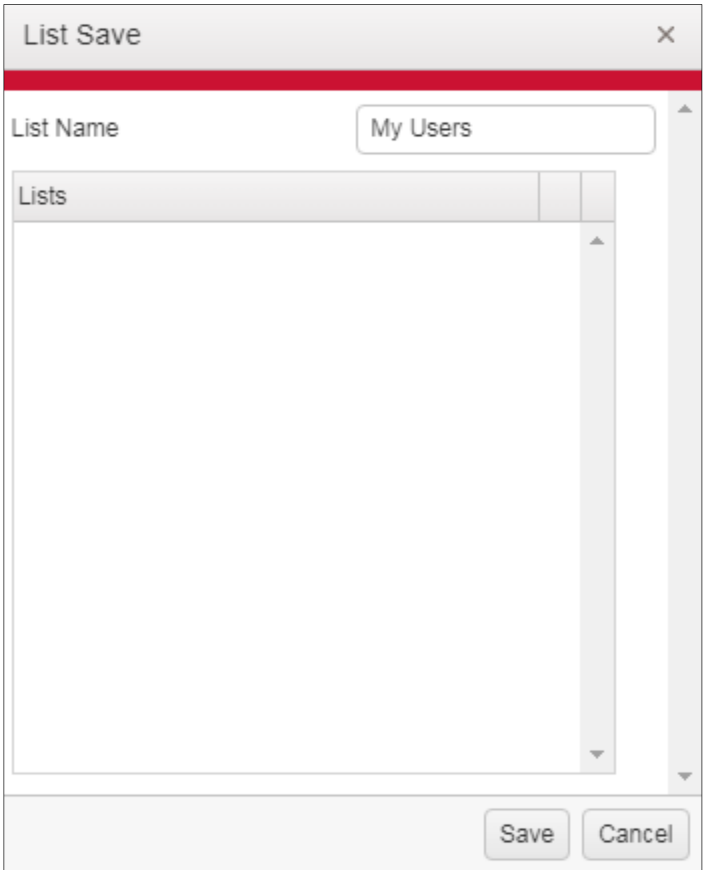
In the **Search Inventory** grid, you can save and load a list.

NOTE: The **Load List** and **Save List** links are only available when you are in the Advanced Search mode.

Save List

This option is used to save a list of items that have been loaded onto a grid. You can then use the **Load List** menu option to quickly load that same list of items any time you need it.

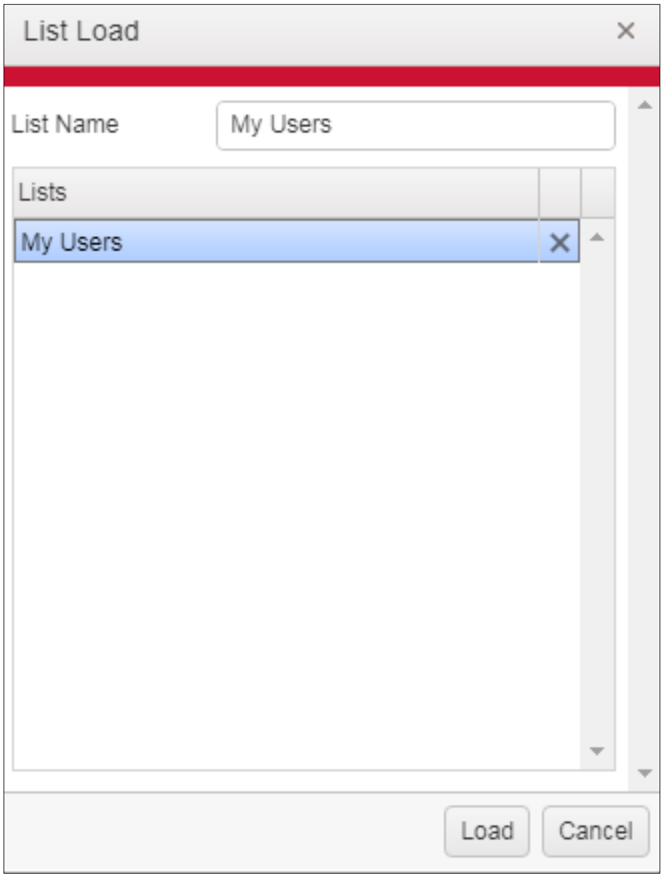
Load all the items you want to appear in your list. Make sure they are selected. Then from the **Options** menu, select **Save List**.



Enter a name for the list (maximum of 24 characters) and click **Save**. The list is saved and can now be used again. Click **Cancel** to return to the grid.

Load List

Once a list of items has been saved, it can be loaded again. From the **Options** menu, select **Load List**.



Select the list you want to load and click **Load**. The list of items is loaded onto the grid.

To delete lists from this dialog box, click the **X** next to the list name.

Function Access

The **Load List** and **Save List** links are only available if the following Function Access is set to Yes.

Feature	Permission	Access
Item	Load List	Yes
Item	Save List	Yes

Order

Cart

The Cart works similar to the shopping cart feature that you may have used on many shopping websites. You can load items into the cart and then when you are ready to place an order, select the items you want included and create an order. Items remain in your cart until you remove them or until they are placed on an order. The cart can contain requests for deliveries, pickups, materials, or services.

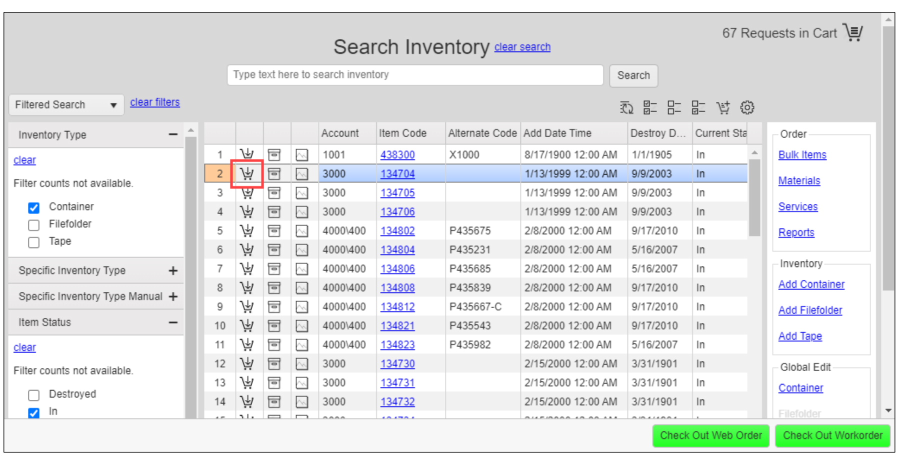
NOTE: The cart only applies to the user logged in (with the exception of the Web User Administrator). So each user will have their own cart containing only the items they have added. Items remain in the cart after you log out, so they will still be there the next time you log back in.

The **Cart** link in the top right corner of the screen shows the number of requests in the cart and provides quick navigation to the **Cart** grid.

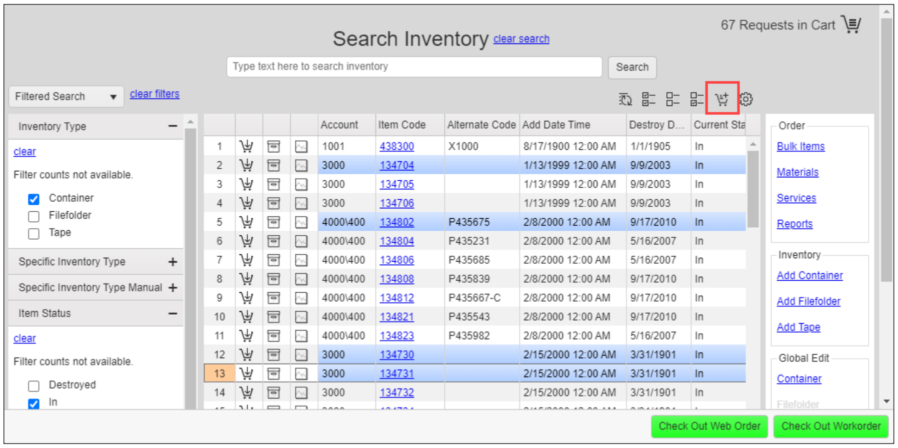
Add Requests to Cart

Containers, Filefolders, and Tapes

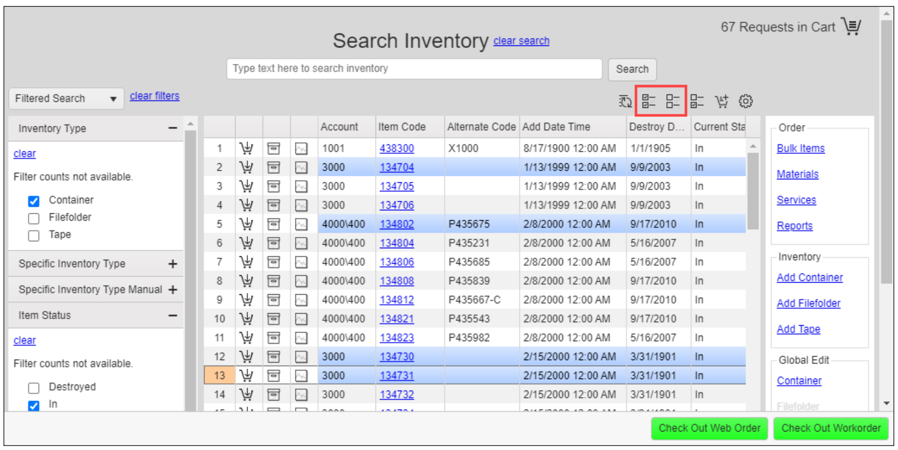
Search for the item you want to order. Once it is loaded on the cart, select it and then click the **Add Item to Cart** icon to add it to the cart. You can also right click on the row and from the context menu, select **Add Item to Cart**.



To add multiple items at once, select all the items and then click the **Add Selected Items to Cart** icon. You can also right click in the grid and from the context menu, select **Add Selected Items to Cart**.



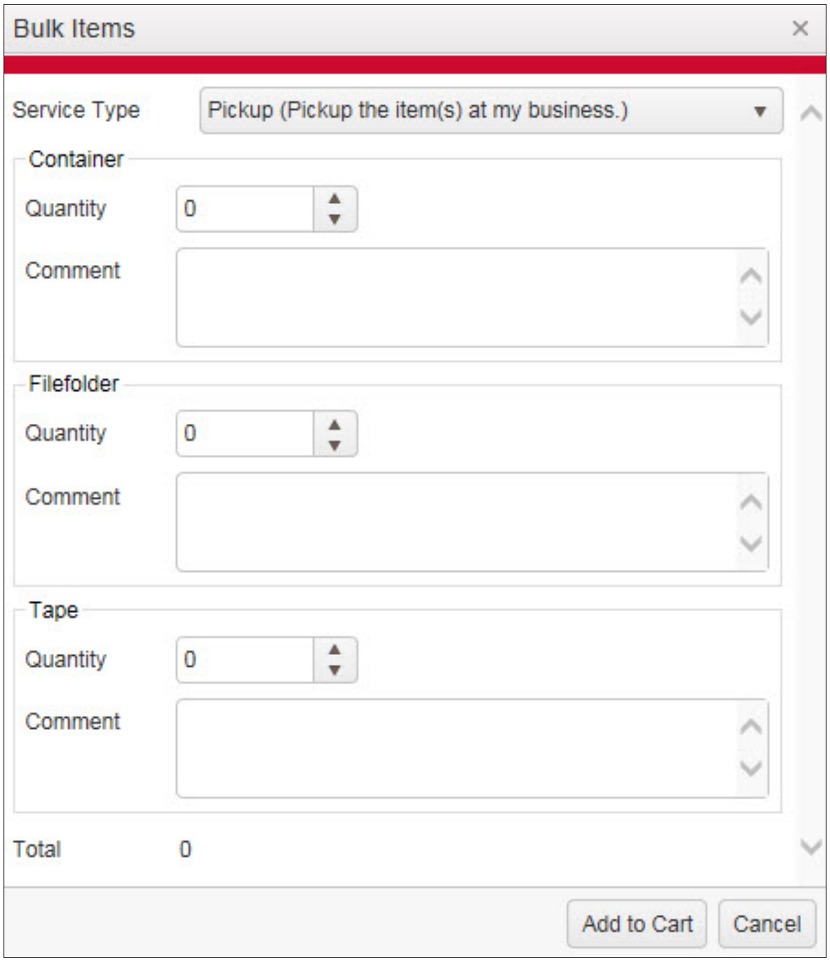
To select or unselect all items in the grid, use the **Select All** or **Unselect All** icons. You can also right click in the grid and from the context menu, select **Select All**, or **Unselect All**.



Bulk Items

This option is used when you have containers, filefolders, or tapes that need to go to storage, but they either don't have barcode labels yet or you don't want to list them individually. It can only be used for items you want the record center to pick up or items you are going to drop off at the record center.

Click **Bulk Items** in the **Order** section on the right side of the screen.



Service Type: Use the drop down arrow and select whether you want the record center to come pick up the items, or whether you are going to take the items to the record center.

Quantity: Enter the number of containers, filefolders, and tapes that are going to the record center. This allows the record center to make sure they have enough space in the truck. If you are dropping the items off at the record center, they may need to plan how much assistance you will need. The maximum quantity allowed is determined by your record center. If you enter a number larger than the maximum, the field is changed to the maximum quantity when added to the cart.

Comment: When adding bulk items to the cart, you can describe the item by entering container, filefolder or tape comments. These comments are then transferred to the final workorder. You can enter up to 81 characters. Once the order is checked out to a web order and the record center converts the web order to a workorder, these comments are posted to the Workorder Notes with the web user's name.

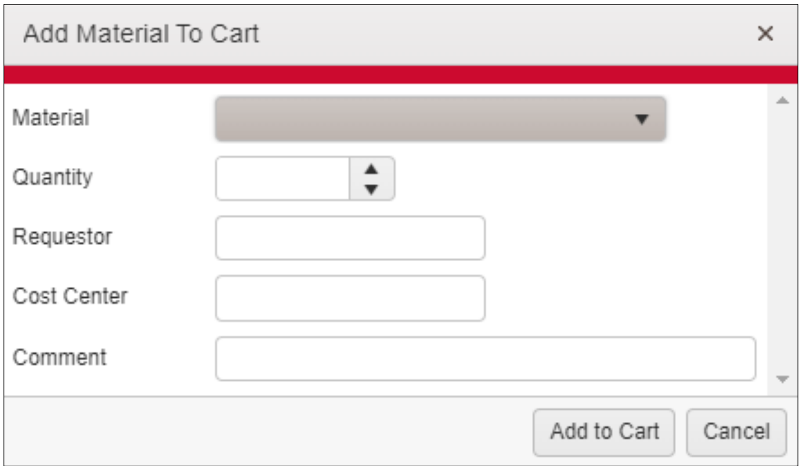
Total: The total number of items displays at the bottom of the dialog box.

When you have finished entering information, click **Add to Cart** and the items are added to the cart.

Materials

Materials are items that you can purchase (or receive) from the record center. Commonly this includes containers of various sizes and barcode labels. Your record center determines what materials are available for ordering.

Click the **Materials** link in the **Order** section on the right side of the screen.



Material: Click the drop down arrow to select the material you want to order.

Quantity: Enter the quantity you are requesting.

Requestor: Enter the name of the person making the request. This field is optional.

Cost Center: Enter a cost center. This field is optional.

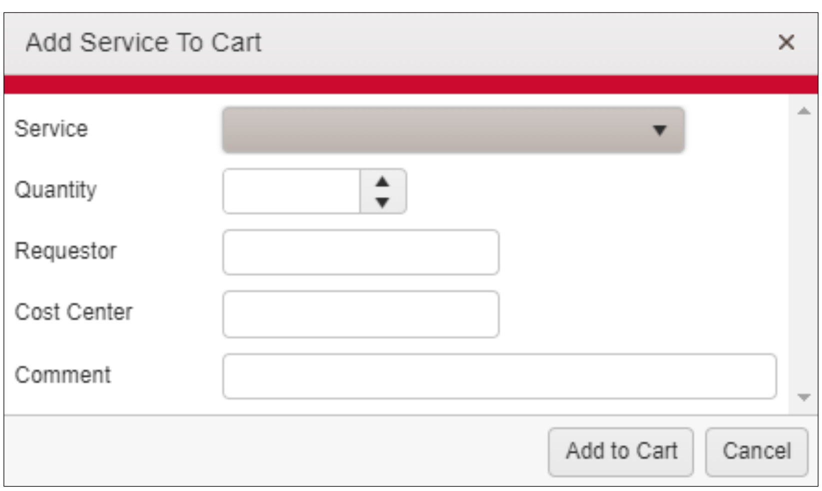
Comment: Enter any additional comments you want the record center to receive.

When you have finished entering information, click **Add to Cart** and the materials are added to the cart.

Services

Services are any miscellaneous services that you might request of the record center. Let's say that you need to look at a document that is in a container in the record center, but you really don't need to have the container delivered to you; nor do you really need the original document. You could place an order for the record center to find the document and fax it to you. Your record center will determine what services are available, but they may include things like faxing, photocopying, or repacking.

Click the **Services** link in the **Order** section on the right side of the screen.



Service: Click the drop down arrow to select the type of service you are requesting.

Quantity: Enter the quantity.

Requestor: Enter the name of the person making the request. This field is optional.

Cost Center: Enter a cost center. This field is optional.

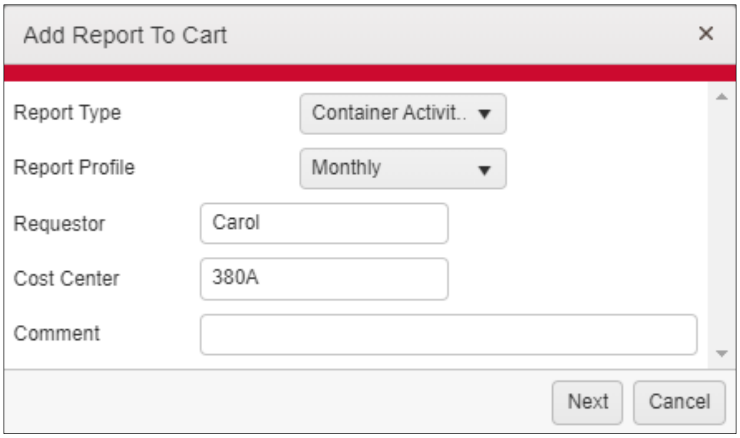
Comment: Enter any additional comments you want the record center to receive.

When you have finished entering information, click **Add to Cart** and the services are added to the cart.

Reports

You can order reports from the record center in O'Neil Order. Your record center has taken the time to set up custom report profiles for you. These have been created so that your report displays the information you want and looks the way you want it. You have the option of changing the setting in a profile; however, keep in mind that any changes you make can affect the outcome of your report. If a report is not displaying properly for you, contact your record center and they can adjust your profile accordingly.

From the **Search Inventory** grid, in the **Order** pane, select the **Reports** link.



Report Type: Click the drop down arrow and select the report you want to order.

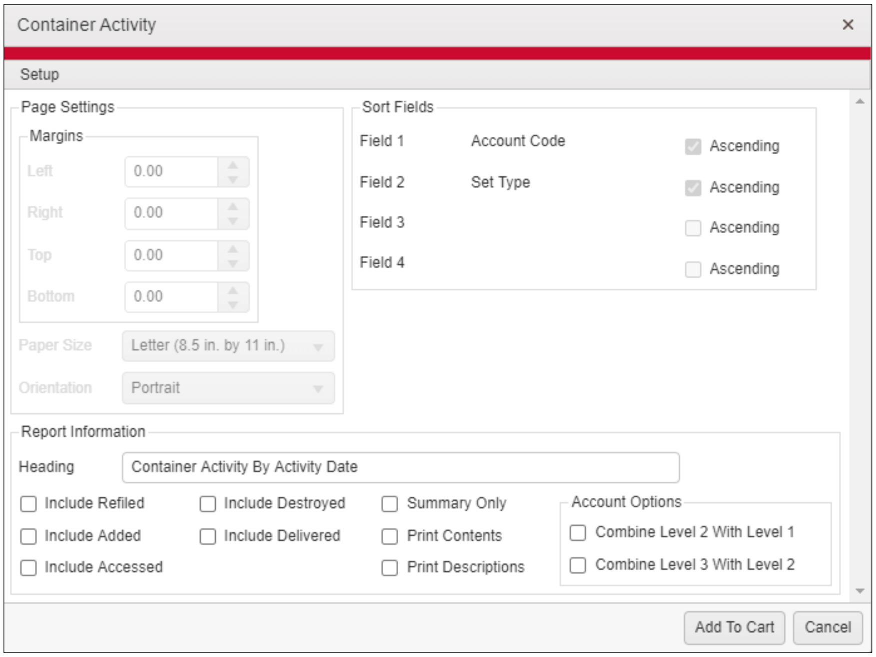
Report Profile: Select the report profile you want to use. Your record center may create custom profiles for you for each of the reports available. A profile is just a set of printing options that is customized and assigned to a specific report for your convenience. If more than one profile has been created for the report you selected, they appear in this field. You still have the option of making changes to the print options.

Requestor: Enter the name of the person making the request. This field is optional.

Cost Center: Enter a cost center. This field is optional.

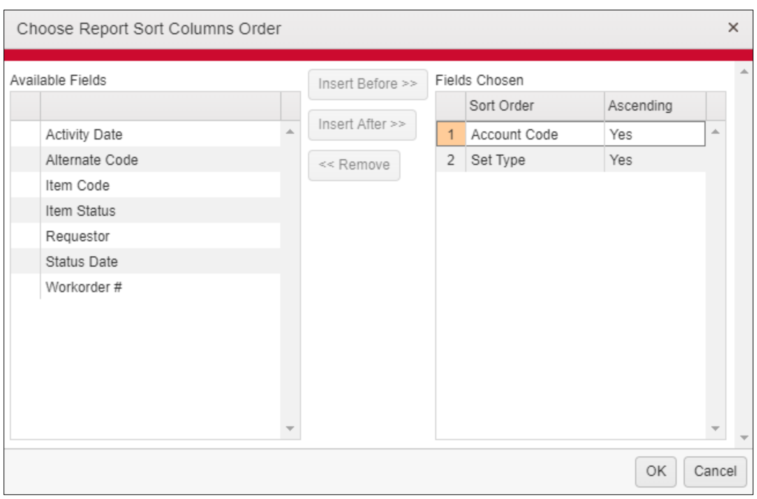
Comment: Enter any additional comments you want the record center to receive.

When you have finished entering information, click **Next**. The Report dialog box appears.



From the **Setup** menu, you can select the sort order and columns you want to display in your report.

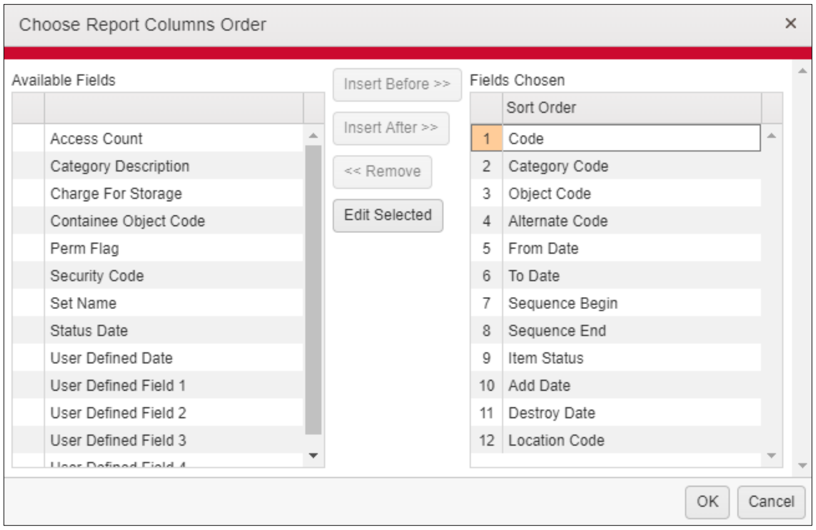
Sort: In the **Choose Report Sort Columns Order** dialog box, you can set up your report to sort in any order you like. If there are predetermined sort criteria, the first fields are filled in and you may not be able to change them.



Choose the fields you want to sort by. You can also choose to have the fields sort by ascending or descending order by clicking in the field and selecting Yes or No.

Columns: For some reports the columns cannot be modified and you receive the following message when you select the **Columns** menu option.

For all other reports, all available columns are listed.



Select the columns and the order in which you want them to appear.

The Page Settings and Sort Fields are determined for you by the record center.

Report Information

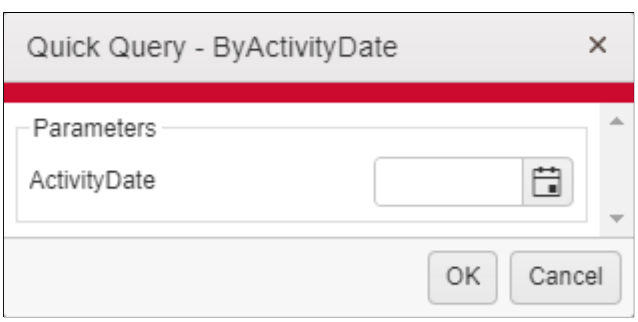
Heading: Your record center has given your report a heading. If you want to change it, type a new name in the Heading field.

Report Specific Options: These check boxes let you select what you want to include in the report. The available choices will vary depending on the report you have selected.

Select the Summary Only check box to print summary information. Select the Print Contents check box to include all data in the Contents field for each item on the report. Select the Print Descriptions check box to include all data in the Description field for each item on the report.

Account Options: Select the Combine Level 2 with Level 1 or the Combine Level 3 with Level 2 check box to combine results for the two account levels.

Once you have made any desired changes, click **Add To Cart**. If a query has been set up, a dialog box displays for you to enter the parameters.



Once you have entered the parameters, click OK to add the report to the cart. You can then place your web order as usual, and you will receive your order confirmation.

Web Order Confirmation

Ordered By:	CAROL
Order Date:	Tuesday, March 3, 2020 9:48 AM
Service Priority:	None
Requested Fulfillment Date/Time:	None
Batch Order Number:	393
Items Successfully Ordered:	1
Items Rejected:	0

Items which could not be added to the order
None

Items successfully added to the order

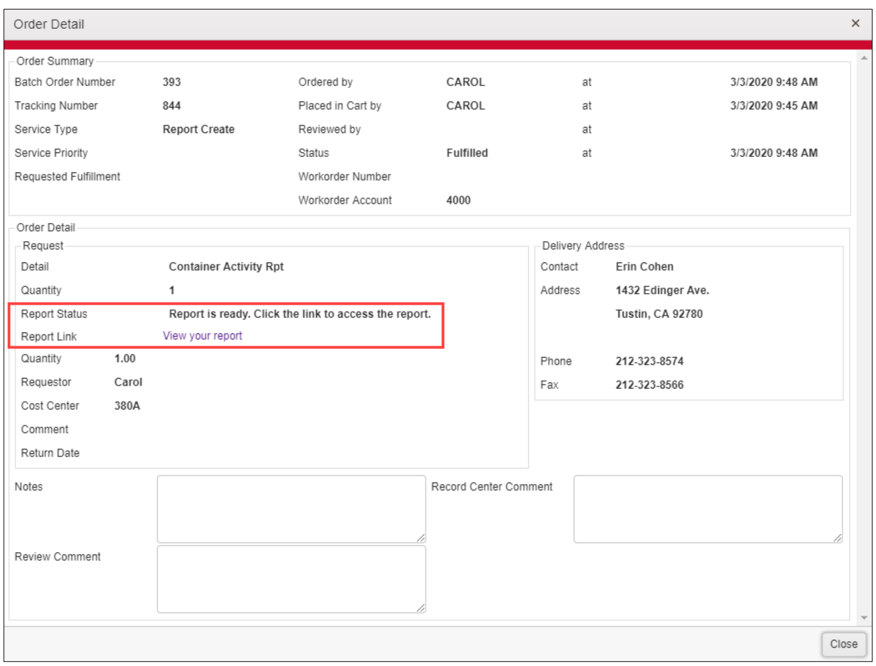
Track#	Service Type	Details	Qty	Requestor	Cost Center	Return Date
844	Report Create	Container Activity Rpt	1	Carol	380A	

Account: 4000

Erin Cohen
1432 Edinger Ave.
Tustin, CA 92780
Phone: 212-323-8574
Fax: 212-323-8566

Notes:

You can check the status of your order from the **Order Status** grid. Right click on the order and select **Detail**.



Order Detail

Order Summary

Batch Order Number	393	Ordered by	CAROL	at	3/3/2020 9:48 AM
Tracking Number	844	Placed in Cart by	CAROL	at	3/3/2020 9:45 AM
Service Type	Report Create	Reviewed by		at	
Service Priority		Status	Fulfilled	at	3/3/2020 9:48 AM
Requested Fulfillment		Workorder Number			
		Workorder Account	4000		

Order Detail

Request

Detail	Container Activity Rpt
Quantity	1
Report Status	Report is ready. Click the link to access the report.
Report Link	View your report
Quantity	1.00
Requestor	Carol
Cost Center	380A
Comment	
Return Date	

Delivery Address

Contact	Erin Cohen
Address	1432 Edinger Ave. Tustin, CA 92780
Phone	212-323-8574
Fax	212-323-8566

Notes

Record Center Comment

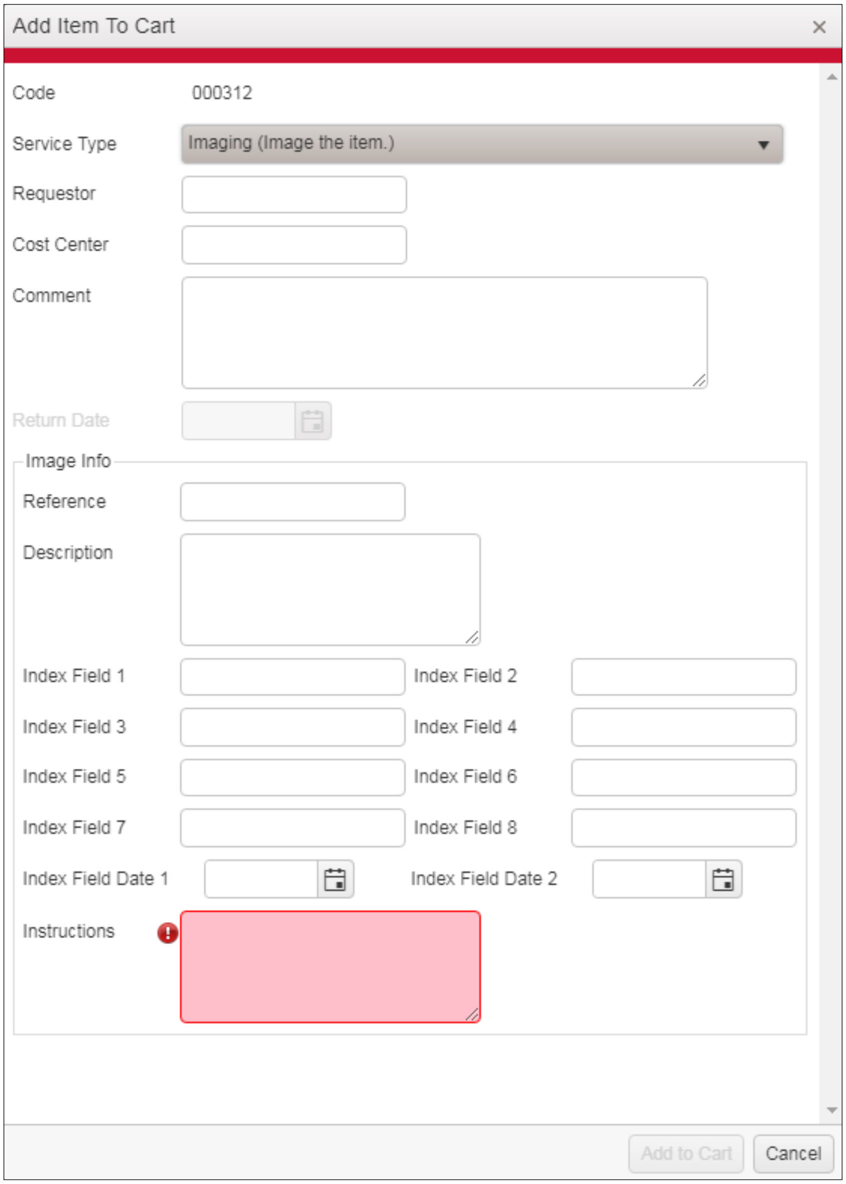
Review Comment

Close

The Report Status field will indicate if the report is ready, and if so, a link is included. Click the link to view your report.

Imaging Request

In the cart, you can add a request for an image to be scanned from an item in a container or filefolder and stored in the database for viewing.



Code: Displays the container or filefolder code from which you want an image made, and is read only.

Service Type: This field is populated with the service type Imaging, and is read only.

Requestor: Enter the person requesting the image. This field is optional.

Cost Center: Enter a cost center. This field is optional.

Comments: Enter any additional comments for the record center.

Reference: This field allows you to type some sort of identifier that can help you group a set of images together.

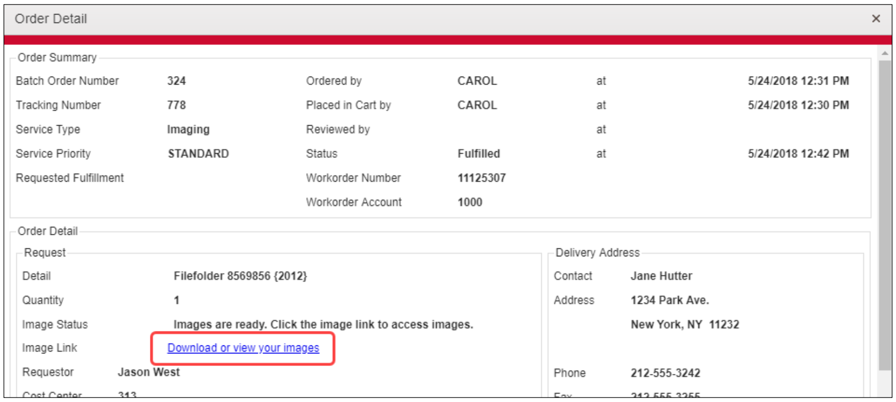
Description: Type a description of the image.

User Defined Fields: Text of your choice can be entered in the user defined fields. There are eight text fields and two date fields available.

Imaging Instructions: Type any special imaging instructions for your record center. This field is required.

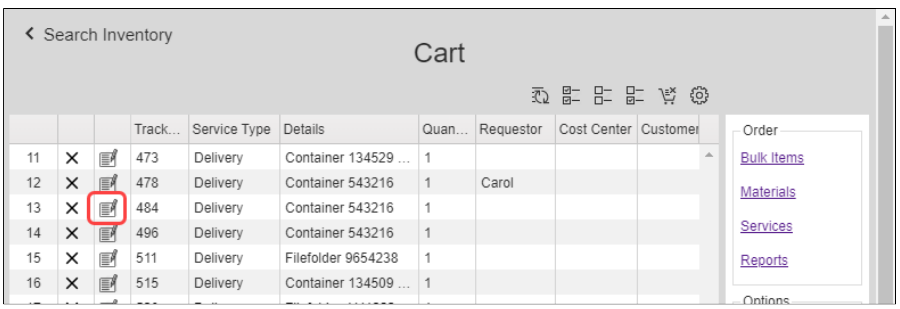
Click **Add to Cart** to add the request to the cart.

Once your request has been fulfilled by the record center, you can view the image in O'Neil Order. Load your order onto the **Order Status** grid. If it has been fulfilled, a link appears in the **Order Detail** dialog.

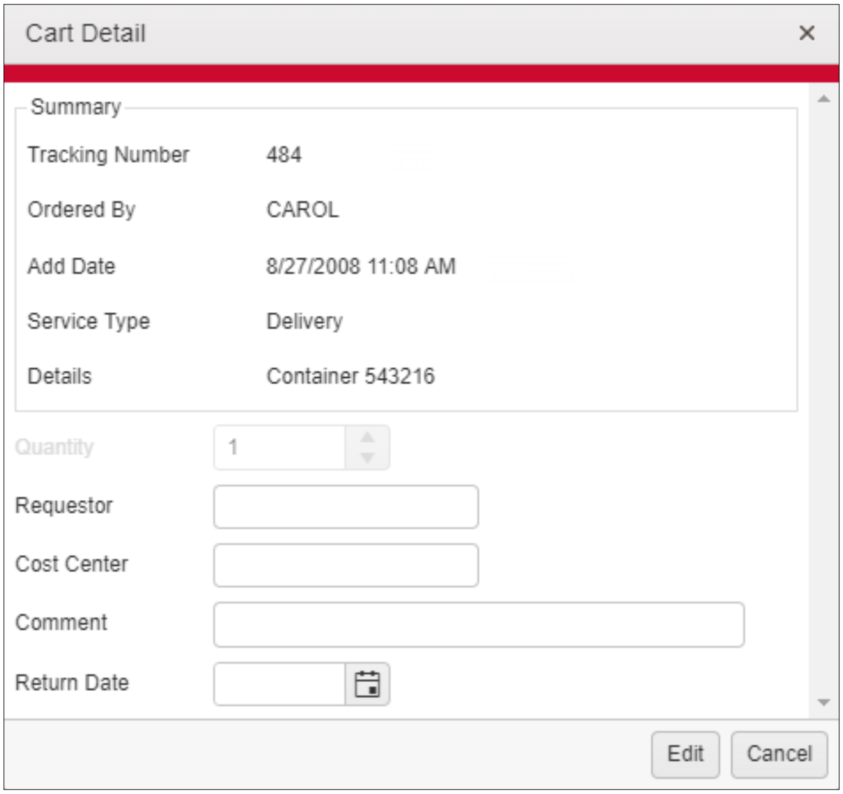


View/Edit Requests

You can edit some of the information for requests that are placed in the cart. In the cart, click the **Edit Request** icon next to the request. You can also right click on the row and from the context menu, select **Edit Request**.



Information regarding the request displays at the top of the screen. This information is read-only.



Depending on the type of request you are editing, you may be able to edit the Quantity, Requestor, Cost Center, Comments and Return Date fields.

NOTE: If the item was identified with a specific barcode, the Quantity field cannot be changed.

When you have made your changes, click **Edit**.

Place a Web Order/Workorder

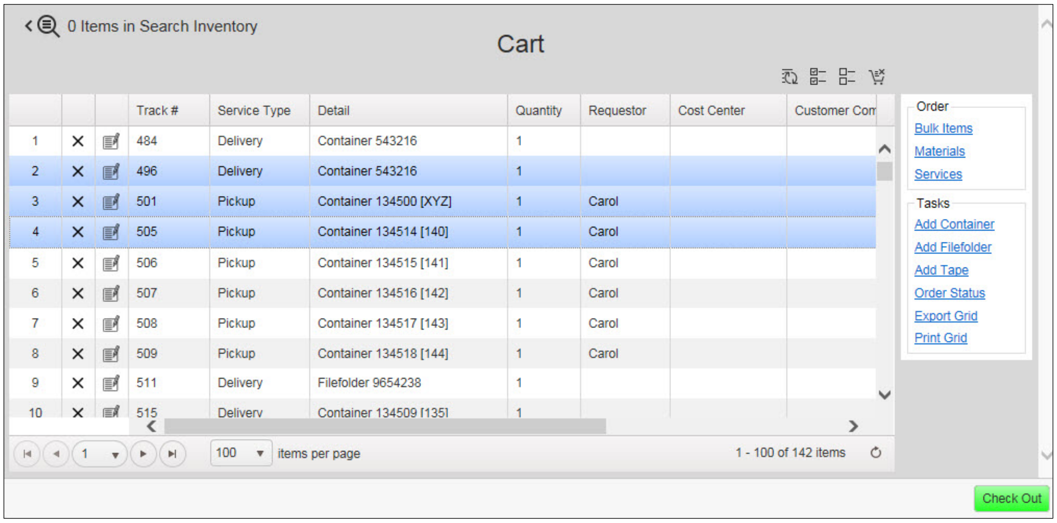
Once you have added requests to your cart, you are ready to check out. This is what actually sends your request to the record center.

When you check out a web order, the order goes to the record center and they create a workorder for you. When you check out a workorder, the workorder is created and sent to the record center.

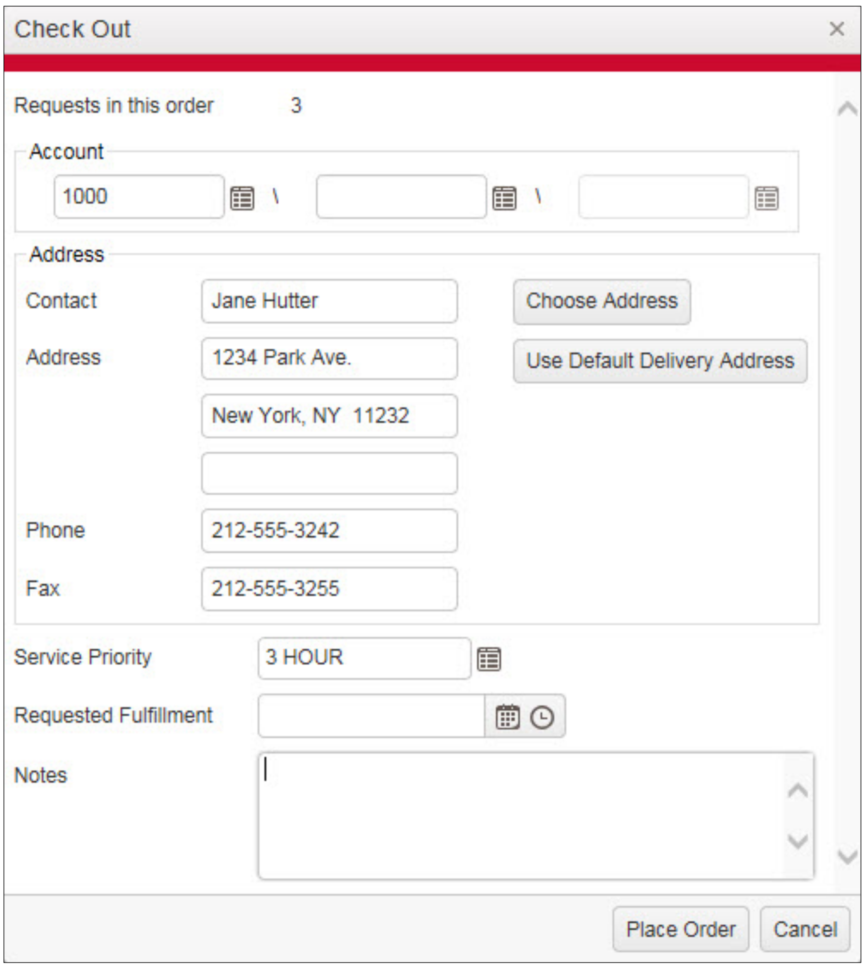
Each request you add to the cart is given a tracking number. Once you create an order or workorder, a batch order number is assigned to that group of requests. A batch can have one or a number of requests assigned to it. Your record center will discuss with you how it uses batches and together you can determine the best way to use them.

Check Out Web Order

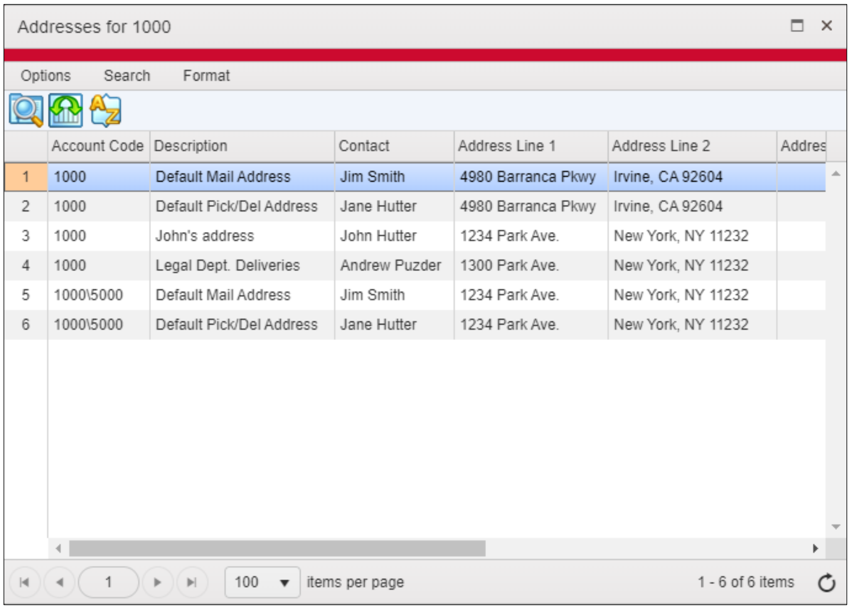
Select the requests in the cart that you want included in the order.



Click **Check Out**.



Enter your account number and your contact information. If you only have access to one account, the account field is populated and grayed out. To use the default address for the account entered, click **Use Default Delivery Address**. To choose a different delivery address, click the **Choose Address** button. The **Address** grid is displayed with all available addresses for the account.

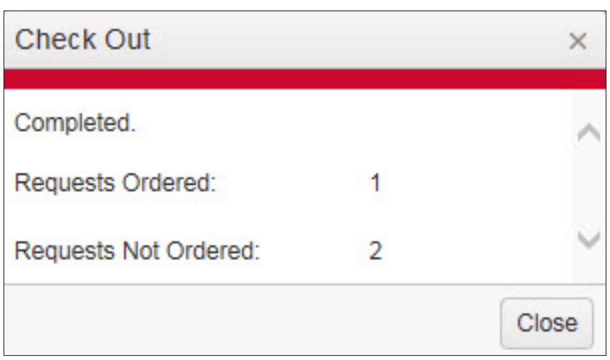


Right click on the address you want and select **OK**. The address fields are automatically populated.

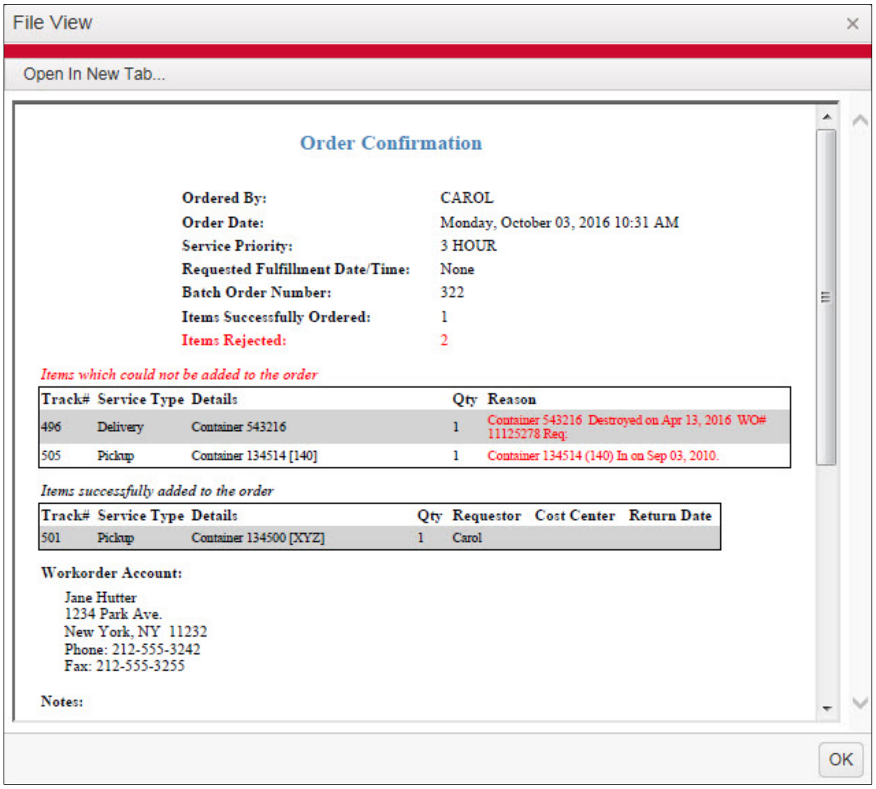
Use the grid picker to select a Service Priority. Depending on your selection, the Requested Fulfillment Date/Time may be automatically populated. If not, enter the date and time you require this order or use the date/time picker to make your selection.

Add any Notes for the order. The Notes text box is used to enter notes that describe the Web order. You can enter up to 512 characters.

When you have finished, click **Place Order**. The order is submitted and a Check Out summary is displayed. It shows the number of items ordered and the number that could not be ordered for some reason.



Click **Close** and an Order Confirmation is displayed.

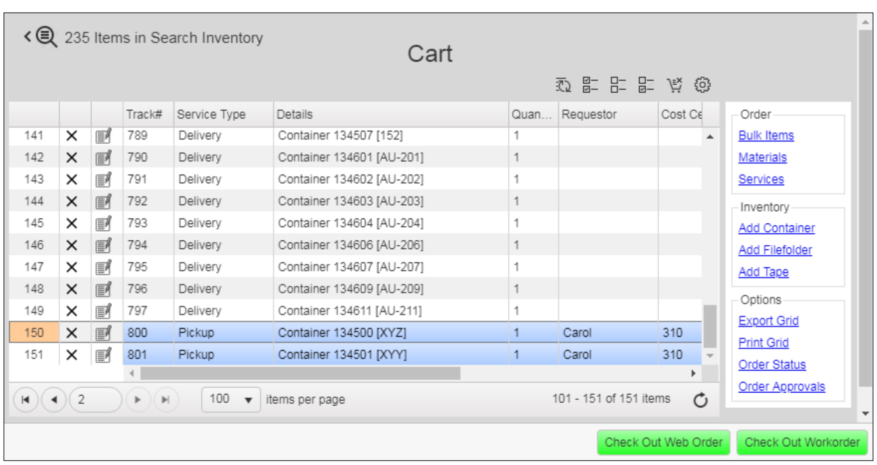


Click **Open In New Tab** to view the confirmation in a full screen. Click **OK** to close the summary and return to the cart.

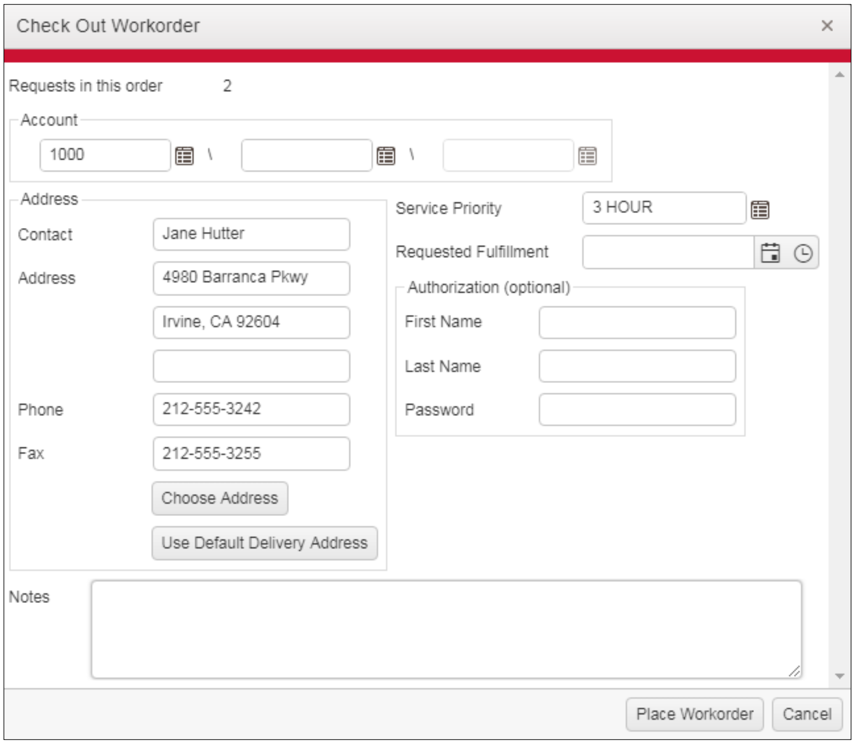
The requests have been removed from the cart. The order has been sent to the record center. They will post the requests to a workorder and fulfill your order.

Check Out Workorder

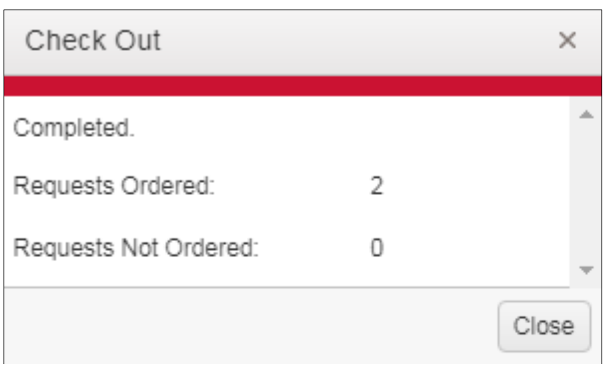
Select the items in the cart that you want included the same as you would for a web order.



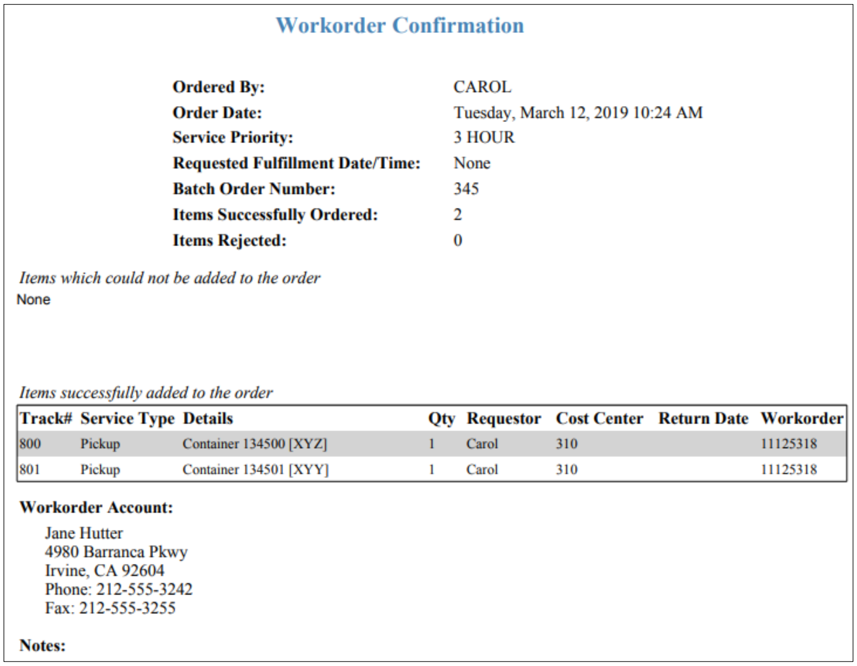
Click the **Check Out Workorder** button.



Make any necessary changes and click the **Place Workorder** button. The workorder is submitted and a **Check Out** summary is displayed.



Click **Close** and a Workorder Confirmation is displayed.



Workorder Confirmation

Ordered By:	CAROL
Order Date:	Tuesday, March 12, 2019 10:24 AM
Service Priority:	3 HOUR
Requested Fulfillment Date/Time:	None
Batch Order Number:	345
Items Successfully Ordered:	2
Items Rejected:	0

Items which could not be added to the order

None

Items successfully added to the order

Track#	Service Type	Details	Qty	Requestor	Cost Center	Return Date	Workorder
800	Pickup	Container 134500 [XYZ]	1	Carol	310		11125318
801	Pickup	Container 134501 [XYY]	1	Carol	310		11125318

Workorder Account:

Jane Hutter
4980 Barranca Pkwy
Irvine, CA 92604
Phone: 212-555-3242
Fax: 212-555-3255

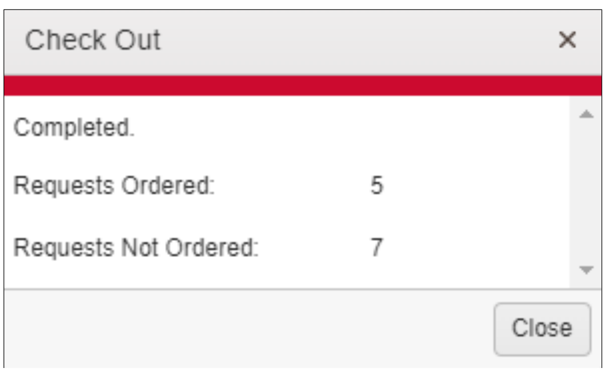
Notes:

Click **OK** to close the summary and return to the cart.

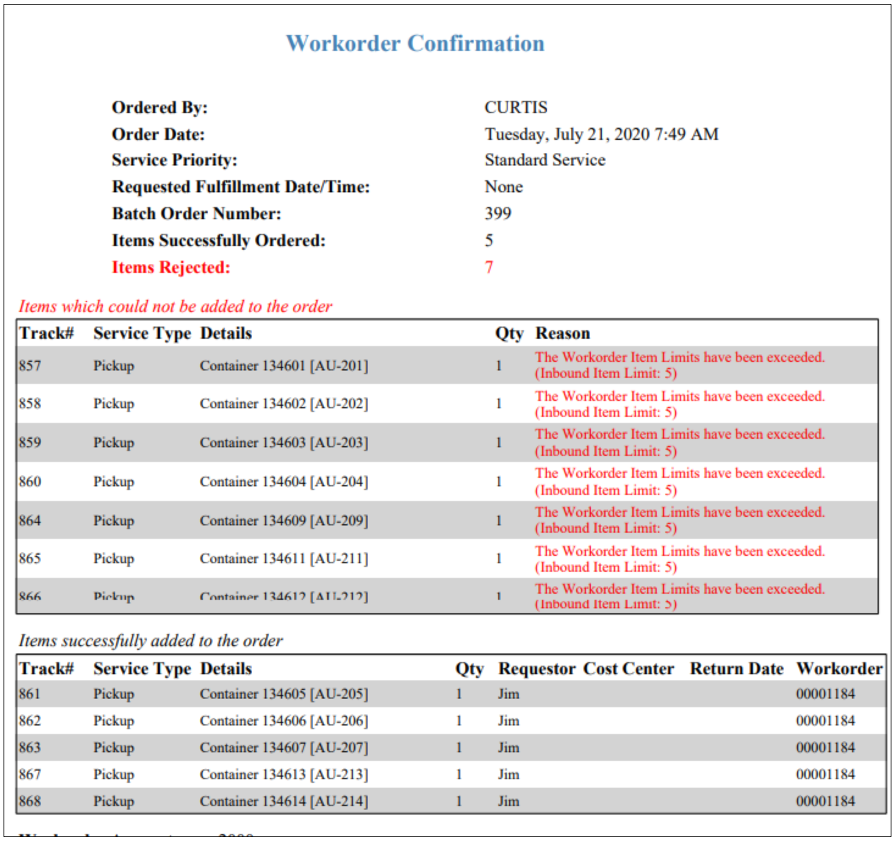
The items have been removed from the cart, and the workorder has been sent to the record center. They will process the workorder and fulfill your request.

Workorder Item Limits

Your record center has the ability to limit the number of items you can check out on a workorder. If a limit has been set and you exceed the limit, some of the items are not ordered.



The Workorder Confirmation tells you which items were ordered and which where not.



Workorder Confirmation

Ordered By:	CURTIS
Order Date:	Tuesday, July 21, 2020 7:49 AM
Service Priority:	Standard Service
Requested Fulfillment Date/Time:	None
Batch Order Number:	399
Items Successfully Ordered:	5
Items Rejected:	7

Items which could not be added to the order

Track#	Service Type	Details	Qty	Reason
857	Pickup	Container 134601 [AU-201]	1	The Workorder Item Limits have been exceeded. (Inbound Item Limit: 5)
858	Pickup	Container 134602 [AU-202]	1	The Workorder Item Limits have been exceeded. (Inbound Item Limit: 5)
859	Pickup	Container 134603 [AU-203]	1	The Workorder Item Limits have been exceeded. (Inbound Item Limit: 5)
860	Pickup	Container 134604 [AU-204]	1	The Workorder Item Limits have been exceeded. (Inbound Item Limit: 5)
864	Pickup	Container 134609 [AU-209]	1	The Workorder Item Limits have been exceeded. (Inbound Item Limit: 5)
865	Pickup	Container 134611 [AU-211]	1	The Workorder Item Limits have been exceeded. (Inbound Item Limit: 5)
866	Pickup	Container 134612 [AU-212]	1	The Workorder Item Limits have been exceeded. (Inbound Item Limit: 5)

Items successfully added to the order

Track#	Service Type	Details	Qty	Requestor	Cost Center	Return Date	Workorder
861	Pickup	Container 134605 [AU-205]	1	Jim			00001184
862	Pickup	Container 134606 [AU-206]	1	Jim			00001184
863	Pickup	Container 134607 [AU-207]	1	Jim			00001184
867	Pickup	Container 134613 [AU-213]	1	Jim			00001184
868	Pickup	Container 134614 [AU-214]	1	Jim			00001184

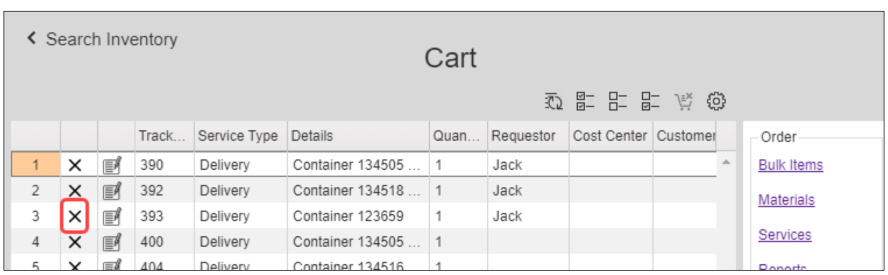
NOTE: You are allowed to exceed the limit when checking out on a web order; however, the record center will place the items on multiple workorders when they process the order.

Remove Requests from Cart

Requests can be removed from the cart without adding them to an order.

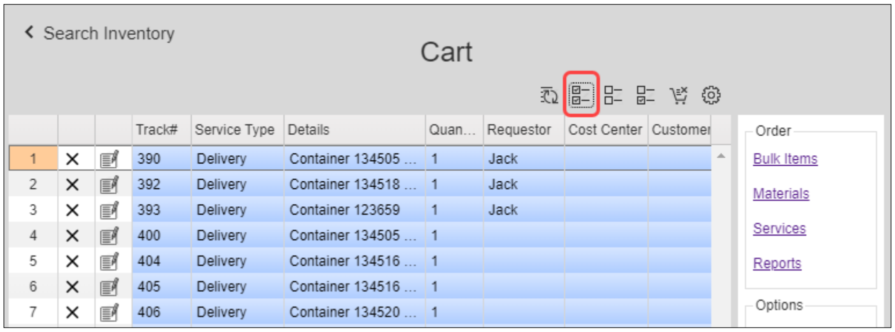
Remove Current Row

To remove only one request from the cart, click the **X** for that row.

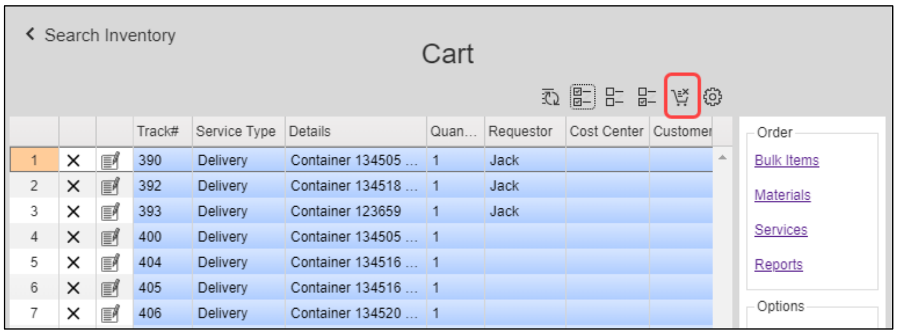


Remove Selected Rows

To remove several requests from the cart at once, select the requests you want to remove. To select all requests in the cart, click the **Select All** icon.



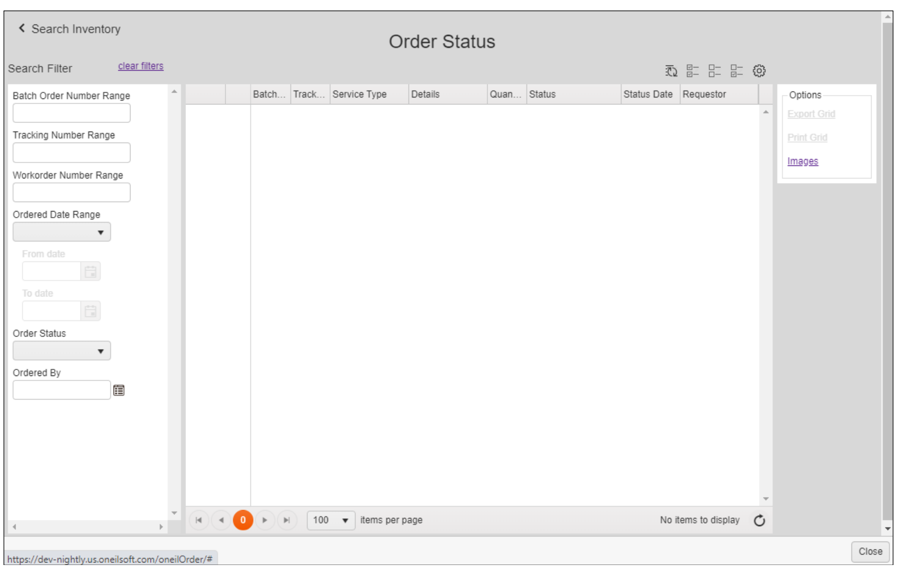
Once the requests are selected, click the **Remove Selected Requests** button.



All selected requests in the cart are removed. Requests that were not selected remain in the cart.

Order Status

Once you have placed an order through O'Neil Order, you can track its status as it is fulfilled by the record center.

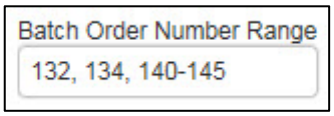


NOTE: If the user logged in is a Web User Admin with permission to modify the cart, the **Order Status** grid will also display the Ordered By, Placed In Cart By, and Placed In Cart Date Time columns.

You can find the orders that you want to track using different criteria. You can tell the system what batch order numbers, tracking numbers, or workorders you are looking for, or you can pull up any orders that were placed during a specified period. Alternately, you can search by the orders' status to find all orders that have reached a specific status. You can also use more than one of the search variables to find orders that match more than one criterion. For example, find all orders placed during the last week that have been fulfilled.

Search by Batch Order Number Range

When you submit an order through O'Neil Order, your order is assigned to a batch, which is identified by a Batch Order Number. Any number of orders can belong to a given batch. To search for orders by Batch Order Number, you can enter a single batch order number, more than one batch order number, a range of batch order numbers, or a combination. Multiple numbers can be separated by a comma or dash.



NOTE: If you enter a batch order number that does not belong to your account (as determined by your log in), it will not be included in the results.

Search by Tracking Number Range

Searching by tracking number works exactly the same as searching by batch order number. The only difference is that each tracking number represents an individual order, whereas one batch order number can represent several orders. To search for orders by tracking number, you can enter a single tracking number, more than one tracking number, a range of tracking numbers, or a combination. Multiple numbers can be separated by a comma or dash.

NOTE: If you enter a tracking number that does not belong to your account (as determined by your log in), it will not be included in the results.

Search by Workorder Number Range

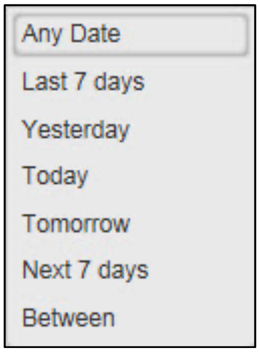
Searching by workorder number works similar to searching by batch order or tracking number. The difference is that this field is alphanumeric. To search for orders by workorder number, you can enter a single workorder number, more than one workorder number, a range of workorder numbers, or a combination. Multiple numbers can be separated by a comma or dash.

NOTE: If you enter a workorder number that does not belong to your account (as determined by your log in), it will not be included in the results.

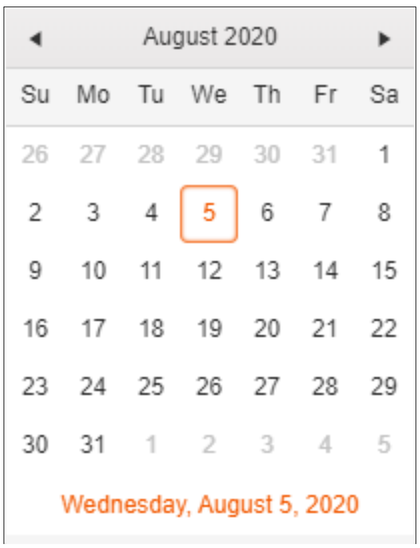
Search by Ordered Date Range

To check the status of orders placed during a specific time period, use the Ordered Date Range fields. To include an Ordered Date in your search, click the drop down arrow in the top field.

Select from the available options.



If you select Between, you will need to enter a From/To date. Type in a date, or click the grid picker next to the field to select a date. You can select just a From date or just a To date. It is not necessary to enter both.



Search by Order Status

To search for orders by their status, click the down arrow next to the Order Status field to select the status of your choice. The possible statuses for an order are as follows:

Submitted: Your order has been received by the record center, but has not yet been reviewed.

Scheduled: Your order has been reviewed by the record center and is scheduled for fulfillment.

Workorder: Your order has been reviewed by the record center and has been placed on a workorder for fulfillment.

Fulfilled: Your order has been fulfilled.

On-Hold: Your order has been placed on hold because for some reason it could not be fulfilled. The record center has or will be contacting you for clarification.

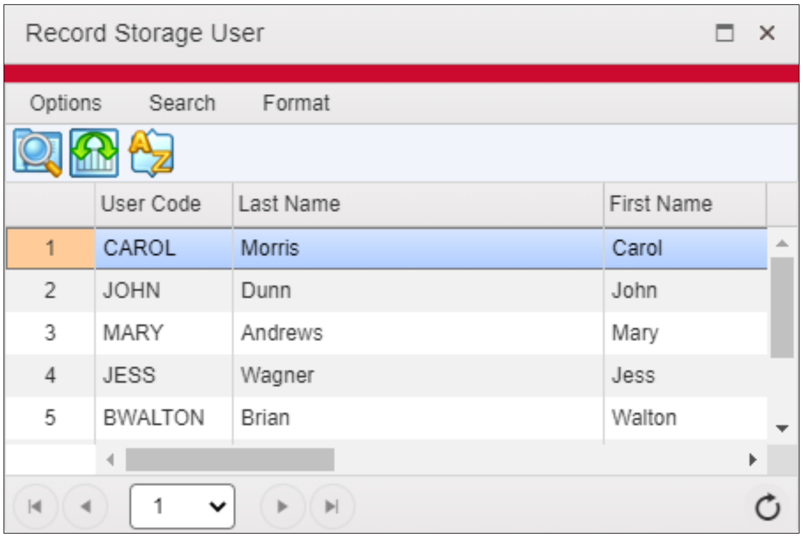
Cancelled: Your order has been cancelled. Contact the record center if you have not been informed of the reason for the cancellation.

Awaiting Approval: Your order is still waiting for approval.

Rejected: Your order has been rejected by the approver and requires further action.

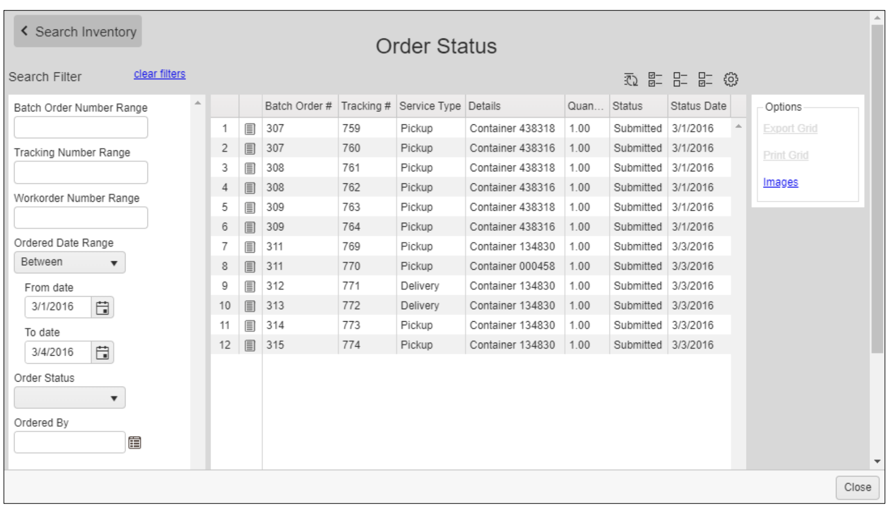
Search by Ordered By

To check the status of orders placed by a specific user, use the Ordered By field. Click the grid picker to select the user you want. If you are a Web User Administrator, your name and the names of all users that have been assigned to you appear in the list. If you are not a Web User Administrator, only your name appears.

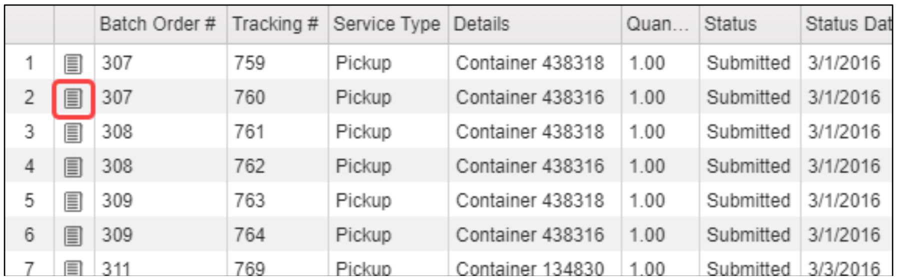


Search Results

As you complete each filter field, the **Order Status** grid is populated with the orders that meet your search criteria.

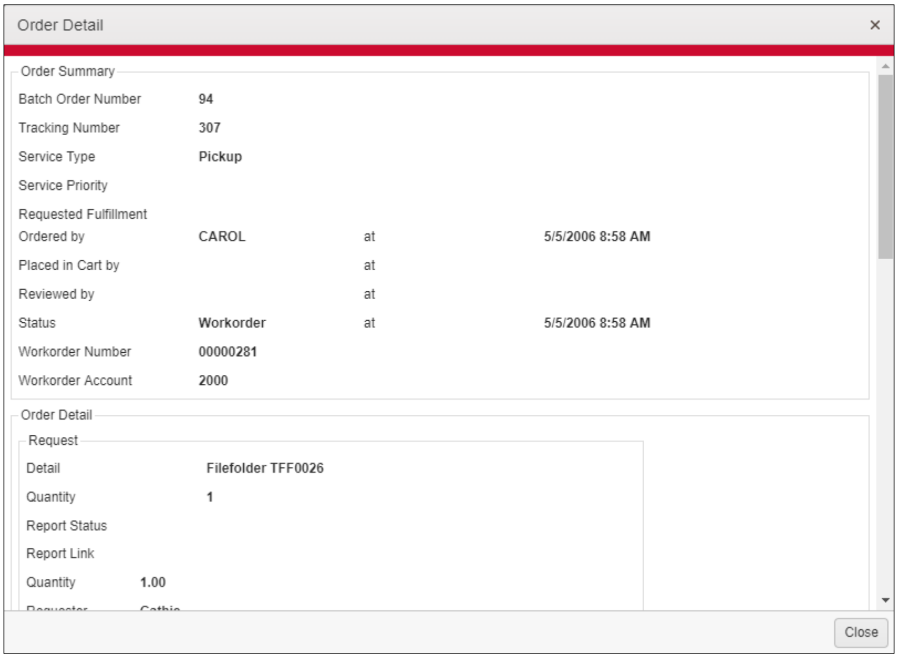


To view more information about any order, click the **View Order Status** icon.



		Batch Order #	Tracking #	Service Type	Details	Quan...	Status	Status Dat
1		307	759	Pickup	Container 438318	1.00	Submitted	3/1/2016
2		307	760	Pickup	Container 438316	1.00	Submitted	3/1/2016
3		308	761	Pickup	Container 438318	1.00	Submitted	3/1/2016
4		308	762	Pickup	Container 438316	1.00	Submitted	3/1/2016
5		309	763	Pickup	Container 438318	1.00	Submitted	3/1/2016
6		309	764	Pickup	Container 438316	1.00	Submitted	3/1/2016
7		311	769	Pickup	Container 134830	1.00	Submitted	3/3/2016

The **Order Detail** dialog box appears.



Click **Close** to return to the **Order Status** grid.

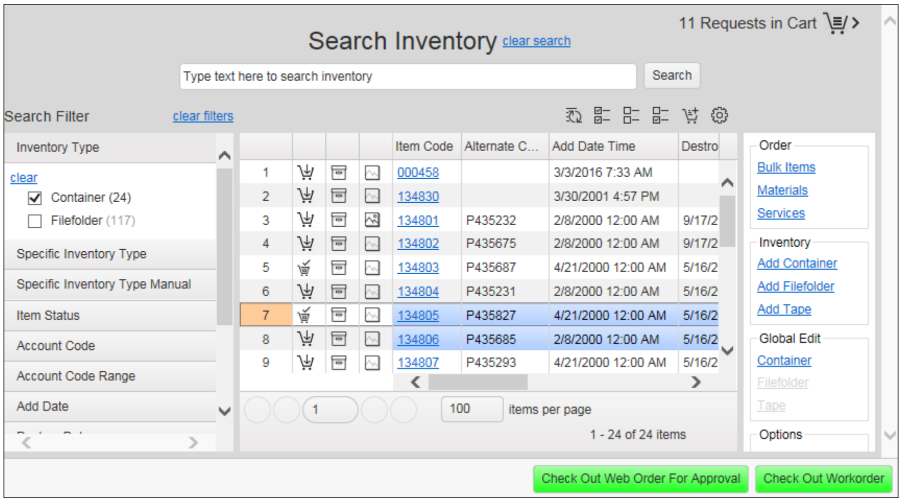
Web Order Approvals

The Web Order Approval feature allows users to be set up to require approval before their orders are submitted, and allows other users to be set up as approvers.

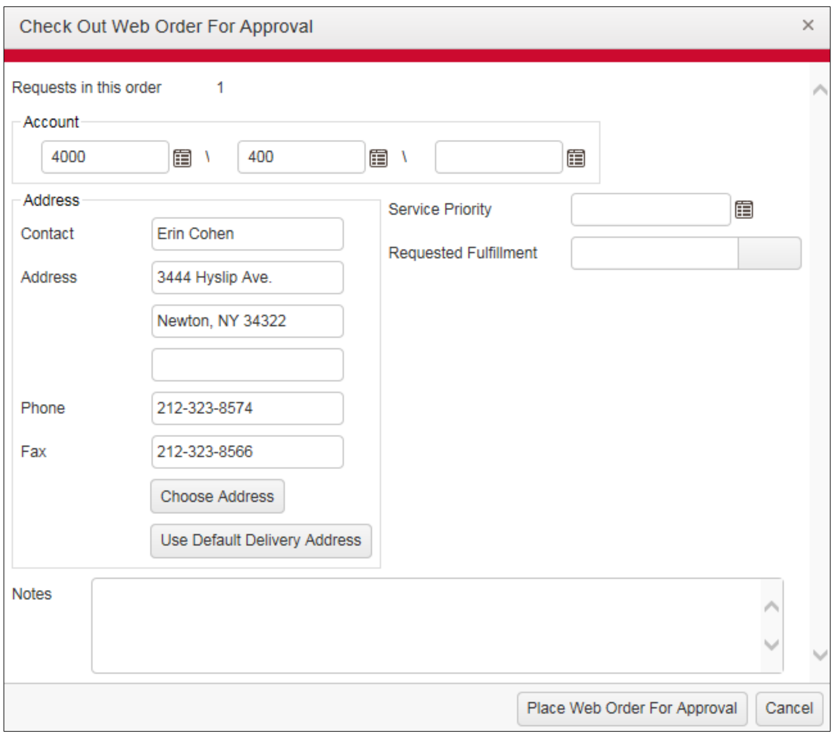
Require Approval

When you require approval for your web orders, orders are checked out as usual. The person assigned to approve your orders is notified, and either approves or rejects your order. If approved, the order is placed. If rejected, the order is not placed and you are notified.

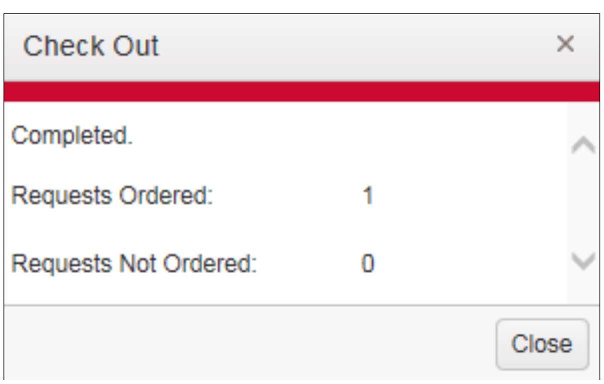
To check out your order, place the items in the cart. You can check out from the **Inventory** grid or go to the **Cart**. From either place, click **Check Out Web Order For Approval**.



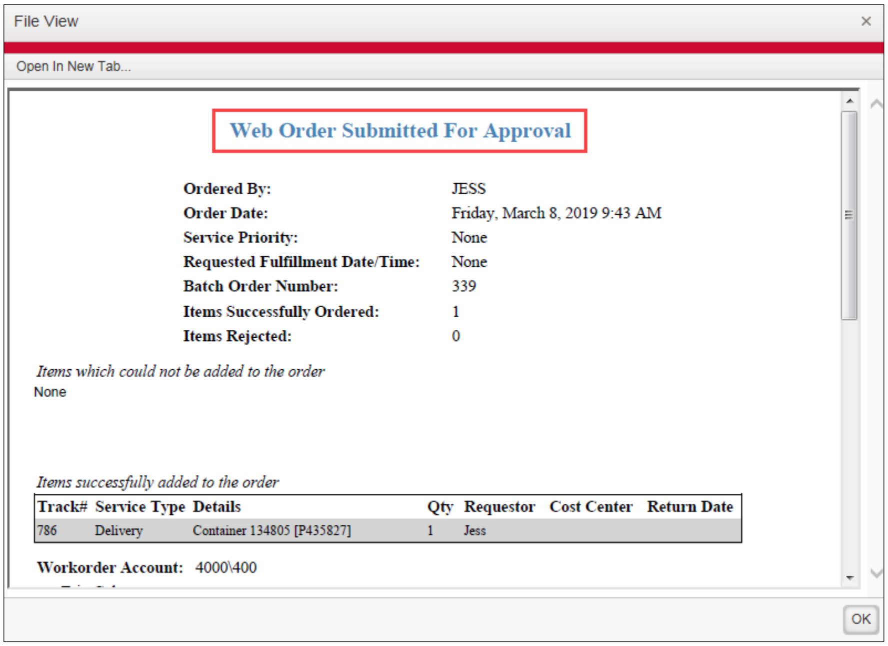
The **Check Out Web Order For Approval** dialog box displays.



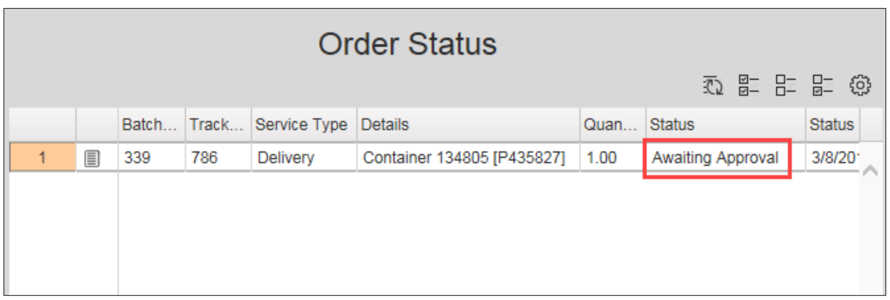
Make any changes and click **Place Web Order For Approval**.



Once the order has been checked out, you receive a confirmation that the web order was submitted for approval.

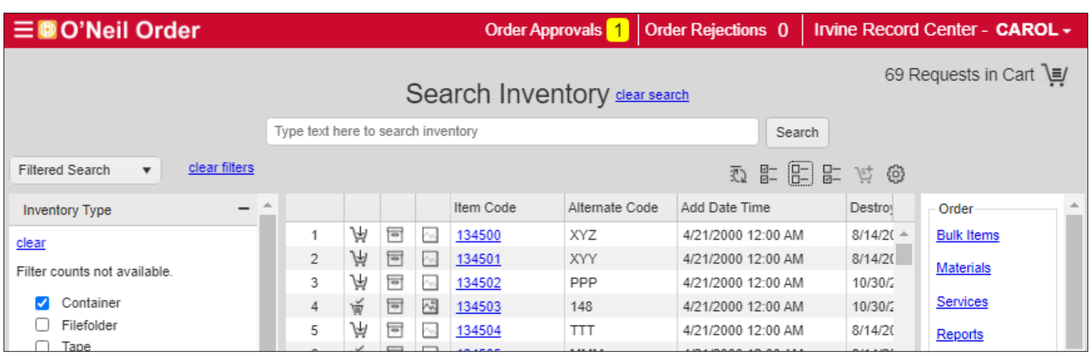


The status of the web order is set to Awaiting Approval.



Approve/Reject an Order

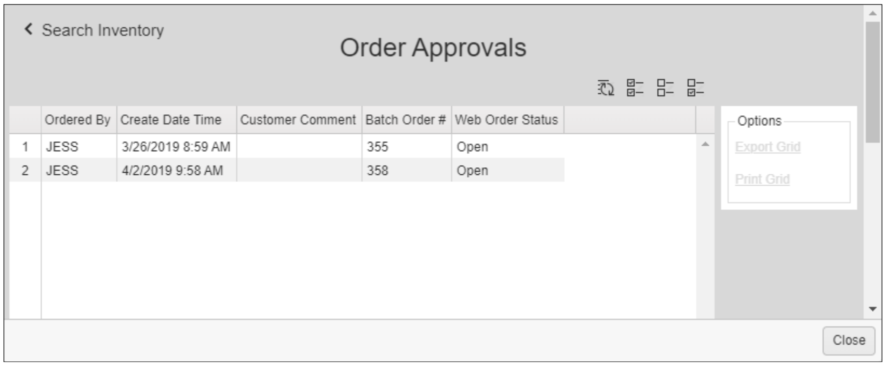
If you are set up as an approver of web orders, an Order Approval alert is available. Each time a web order is placed that needs your approval, the number in the alert increments.



NOTE: You must be a Web User Administrator with a user assigned to you in order to approve or reject their web orders. You must also have Web Order/Create and Web Order/Approve function access set to Yes

Approve a Web Order

When you have orders to approve, click the **Order Approvals** link in the **Options** menu.

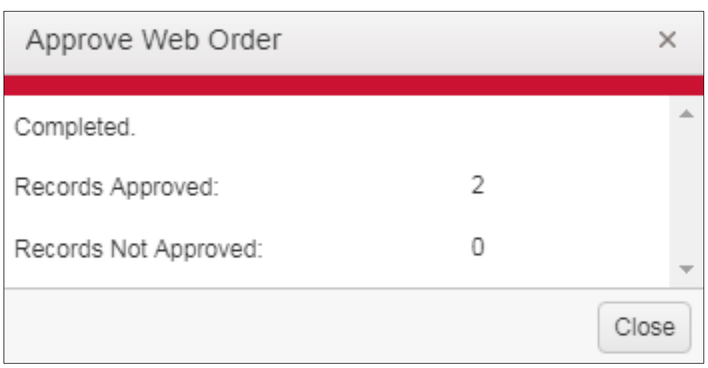


The grid is populated with all web orders waiting for approval.

To approve an order without reviewing its details, right click on it and select **Approve Order**.

NOTE: Only one web order is approved at a time.

Enter a Comment (optional) and click **Approve**. All items in the web order will be approved.

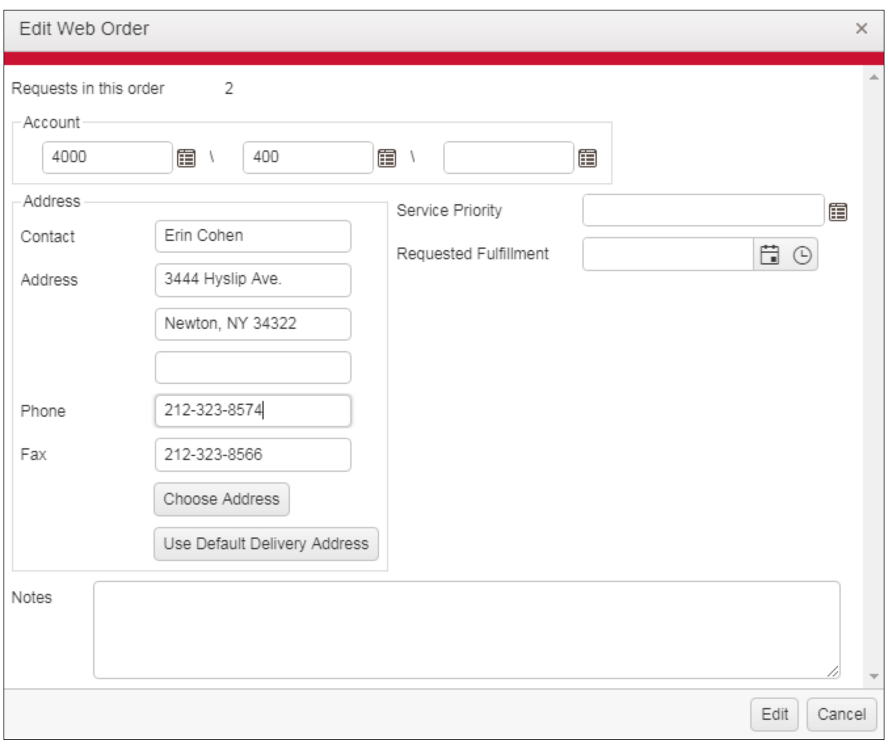


Click **Close**. The web order is submitted and you receive a confirmation.

Click **OK** to return to the **Order Approvals** grid. Once an order has been approved, it is removed from the grid.

Edit a Web Order

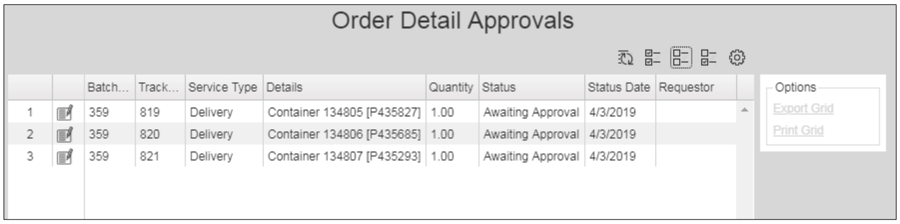
The **Edit Web Order** dialog box allows you to modify a web order before approving it. Right click on an order and select **Edit**.



Make any necessary changes and click **Edit** to save.

Approve Order Detail

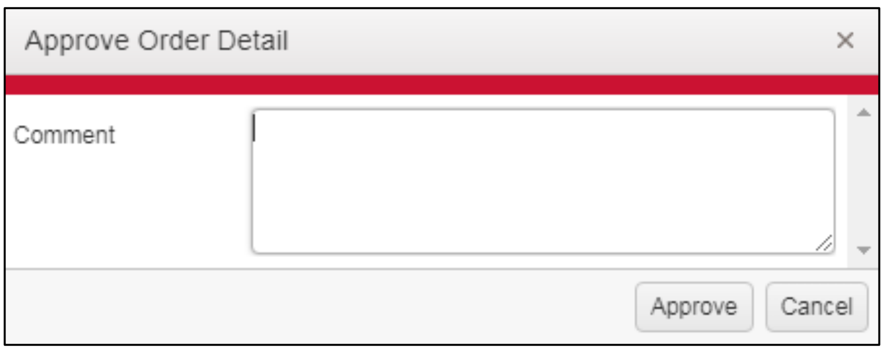
To view the individual items in a batch before approving/rejecting an order, right click on it and select **Order Detail Approvals**.



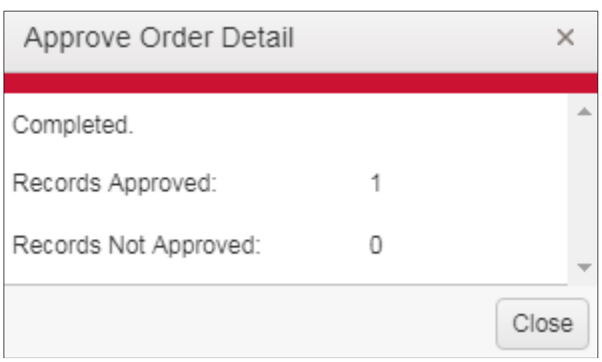
Each item in the order is displayed. They can be approved or rejected individually

To approve the order detail, right click on it and select **Approve Order Detail**.

NOTE: To approve multiple items in the grid at the same time, select them and then right click and select **Approve Selected Order Detail**.



Enter a Comment (optional) and click **Approve**.

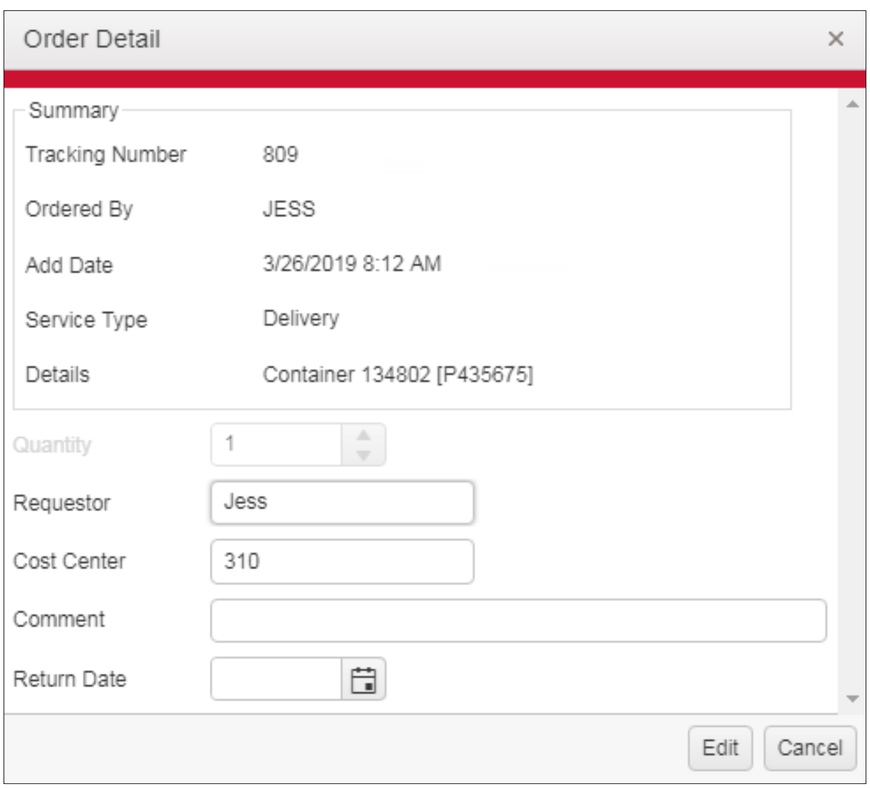


Click **Close**. The web order for the approved item is submitted and you receive a confirmation.

Click **OK** to return to the **Order Detail Approvals** grid. Once an order has been approved, it is removed from the grid.

Edit Order Detail

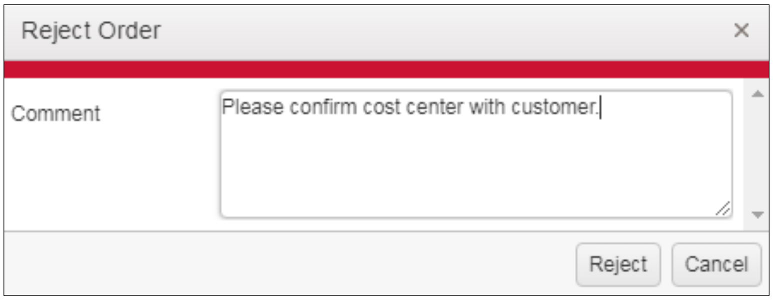
The **Order Detail** dialog box allows you to modify web order details before approving them. Right click on the order and select **Edit.**



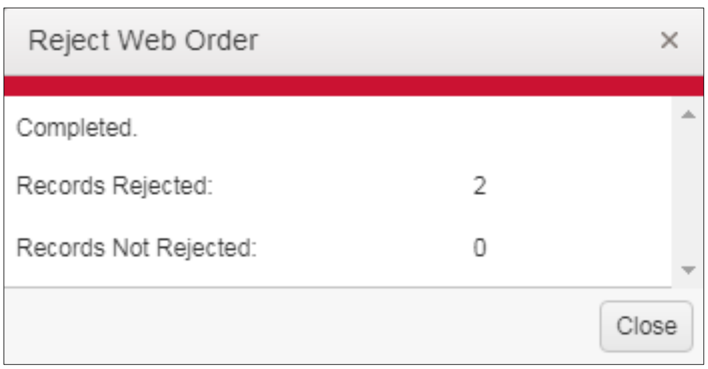
Depending on the type of order, different fields may be available. View or make any necessary changes and click **Edit** to save.

Reject an Order

To reject an order without reviewing its details, right click on it and select **Reject Order**.



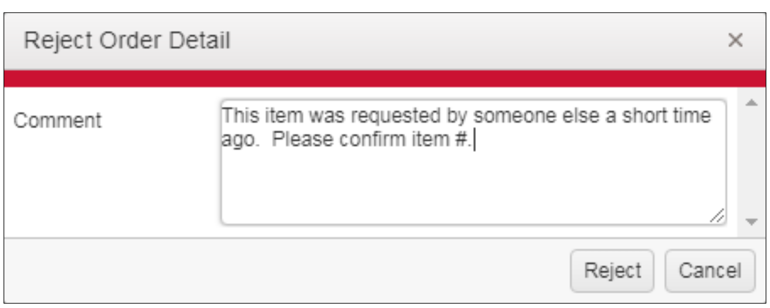
Enter a Comment (required) explaining why the order was rejected, and click **Reject**.



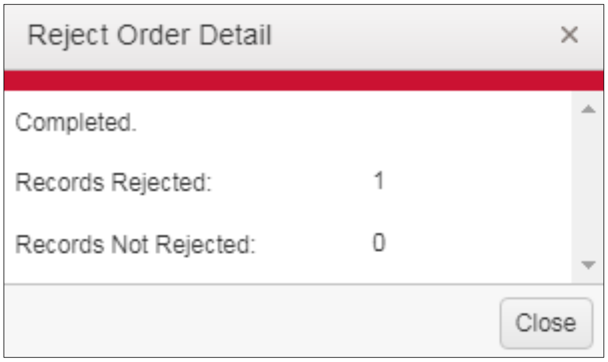
Click **Close** to return to the **Order Approvals** grid. Once an order has been rejected, it is removed from the grid.

Reject Order Detail

Orders can also be rejected from the **Order Detail Approvals** grid. If an order needs to be rejected for some reason, right click on it and select **Reject Order Detail**.



Enter a Comment (required), and click **Reject**.

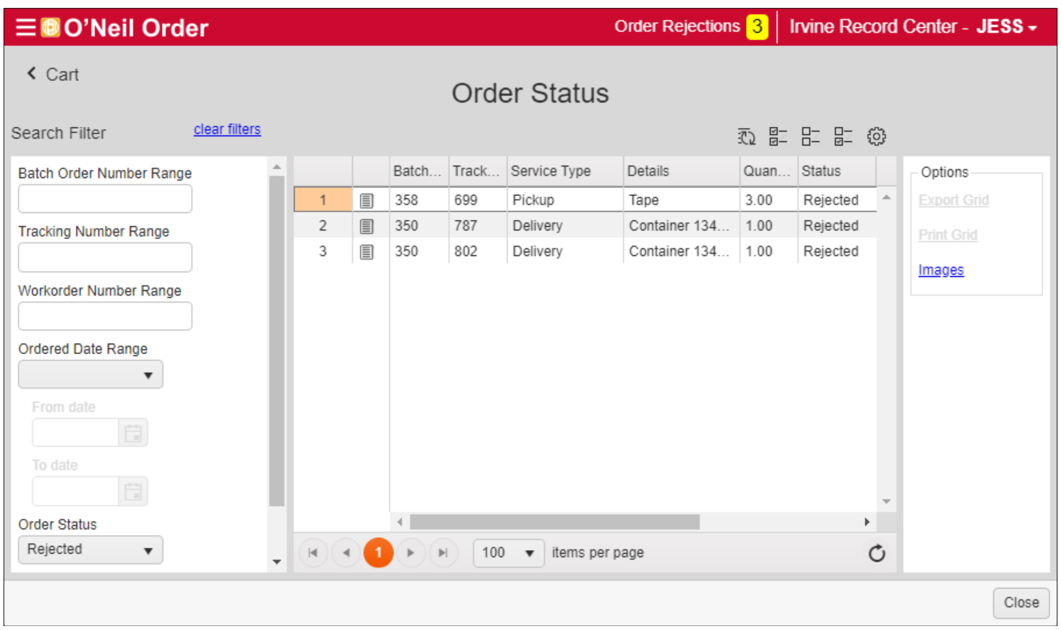


Click **Close** to return to the **Order Detail Approvals** grid. Once an order has been rejected, it is removed from the grid.

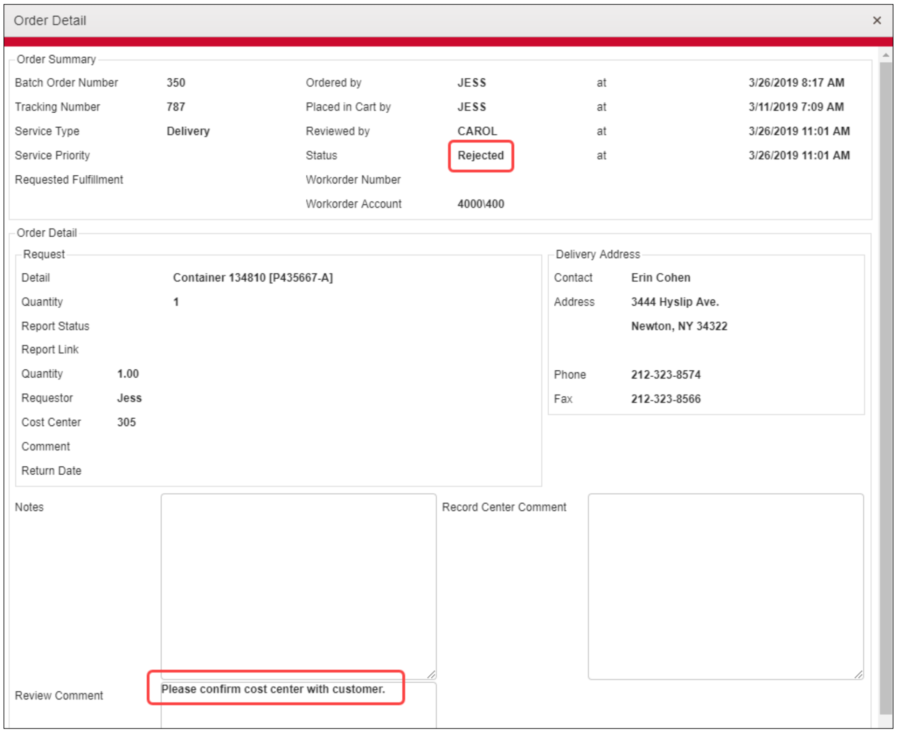
Rejected Orders

If an order you submit for approval is rejected, an Order Rejections alert is available. Each time a web order you placed is rejected, the number in the alert increments.

To view rejected orders, in the **Order Status** grid, filter your search on Order Status of Rejected.



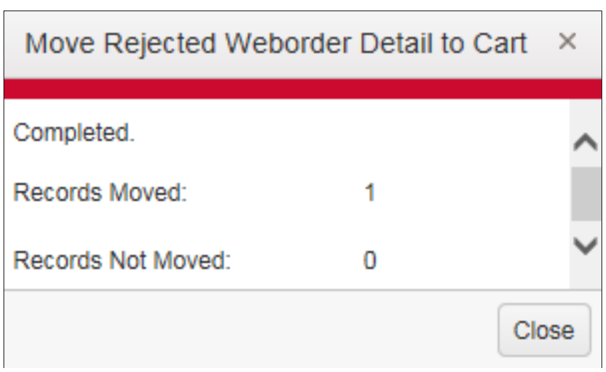
Right click on the order, and select **Detail**.



The order status is Rejected and the Review Comment explains why. Click **Close** to return to the **Order Status** grid.

Do what is necessary to correct the order. Right click on the order and select **Move Rejected Web Order to Cart**.

NOTE: You can only move rejected orders to the cart for orders you created, or that were created by a user that you are a cart administrator for.



The order can then be checked out for approval again.

NOTE: If you need to create a new order and want to delete the rejected order, move it to the Cart and then you can delete it from there.

Function Access

The **Order Approvals** link is only available if the following Function Access is set to Yes. The user logged in must also be a Web User Administrator.

Feature	Permission	Access
Order Approvals	Grid	Yes
Order Detail Approvals	Grid	Yes
Web Order	Approve	Yes
Web Order	Create	Yes

Alerts

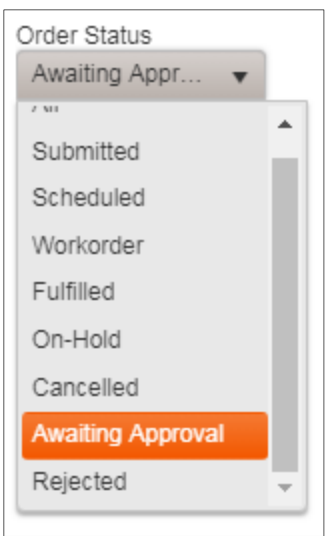
The alert bar has two alerts related to order approvals.

Order Approvals: This alert can be displayed if you are set up as an approver for web orders placed by others. It displays the number of orders waiting for approval. The count is updated as soon as a web order detail status changes to/from Awaiting Approval.

Order Rejections: This alert can be displayed if you are required to get approval for your web orders. It alerts you to the number of orders that have been rejected by the approver and need further action. The count is updated as soon as a web order detail status changes to/from Rejected.

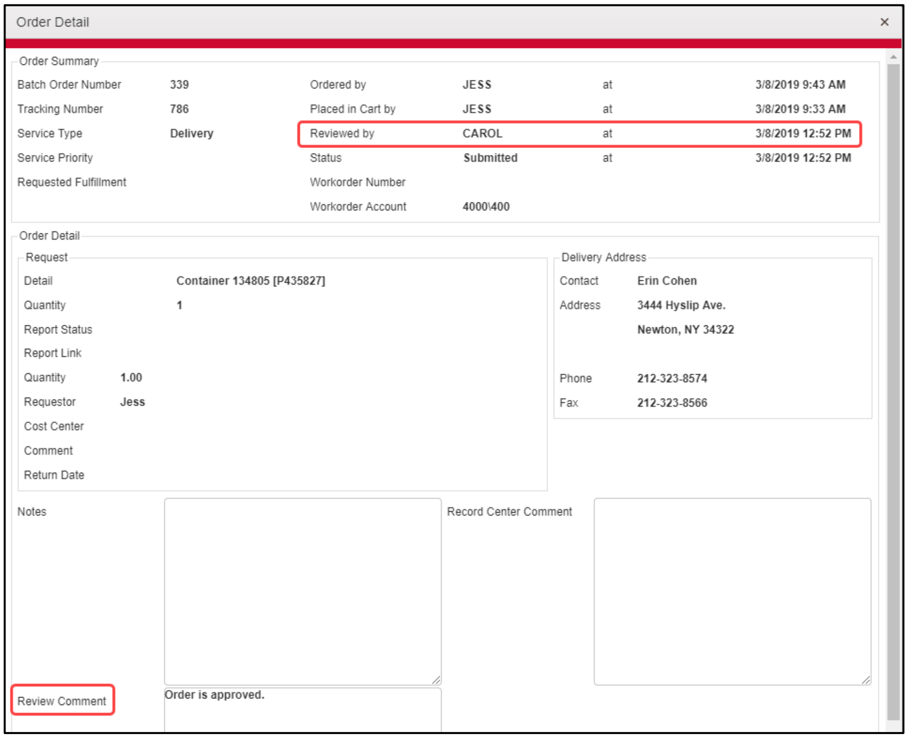
Order Status Filter

When searching for orders in the **Order Status** grid, you can filter on Awaiting Approval and Rejected in the Order Status field.



Order Detail Fields

The **Order Detail** dialog box contains Reviewed By and Review Comment fields.


Order Detail
Order Summary
Batch Order Number 339
Tracking Number 786
Service Type Delivery
Service Priority
Requested Fulfillment
Ordered by JESS at 3/8/2019 9:43 AM
Placed in Cart by JESS at 3/8/2019 9:33 AM
Reviewed by CAROL at 3/8/2019 12:52 PM
Status Submitted at 3/8/2019 12:52 PM
Workorder Number
Workorder Account 4000\400
Order Detail
Request
Detail Container 134805 [P435827]
Quantity 1
Report Status
Report Link
Quantity 1.00
Requestor Jess
Cost Center
Comment
Return Date
Delivery Address
Contact Erin Cohen
Address 3444 Hyslip Ave.
Newton, NY 34322
Phone 212-323-8574
Fax 212-323-8566
Notes
Record Center Comment
Review Comment
Order is approved.

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