# O'Neil Order Client User Guide



**O'Neil Software, Inc.** 

February 2021



# Copyright

O'Neil Order is a trademark of O'Neil Software, Inc. All other brand and product names are trademarks or registered trademarks of their respective companies.

This manual and any examples contained herein are provided "as is" and are subject to change without notice. O'Neil Software, Inc. or its affiliates makes no warranty of any kind with regard to this manual, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose. O'Neil Software, Inc. or its affiliates shall not be liable for any errors or for incidental or consequential damages in connection with the furnishing, performance, or use of this manual or the examples herein. This guide is copyrighted. All rights are reserved. This guide may not, in whole or in part, be reproduced, translated, stored in a retrieval system or transmitted, in any form or by any means, electronic, mechanical, photographic, or otherwise, without the prior written consent of O'NEIL SOFTWARE, INC.

© COPYRIGHT O'NEIL SOFTWARE, INC., 2021

February 2021

# Contents

#### Navigating O'Neil Order

Overview	1
Access O'Neil Order	
Log In	
Change Password	ייייי ז
Log Out	
Time Out	
Grids	
Select/Unselect Rows	
Columns	
Column Format/Sort Format	
Context Menu	
Icons	
Dialog Boxes	
Grid Picker	
Date/Time Fields	
Errors/Warnings	
Export Grid	
Print Grid	
Column Heading Font	
Column Detail Font	
Page Settings	

#### Web User Admin

Function Access 24 

1

17

### Inventory

Introduction	
Search Inventory	
Filtered Search	
Search Text Field	
Columns Searched	
Supported Searches	
Searches not Supported	
Search Filters	
Clear Filters	41
Result Limit Exceeded	41
Advanced Search	42
Switch from Advanced to Filtered Mode	43
Add Container	44
Edit Existing Containers	44
Add Filefolder	45
Edit Existing Filefolders	
Add Tape	47
Edit Existing Tapes	
Retention Information	
Filefolders/Tapes in Container	50
View Item Activity	
Images	
View Images from Search Inventory Grid	51
View Images from Images Option	
Edit/View	
Delete	
Description	
Keywords	
Find	
Find and Replace	
Contents	
Load From File/Save to File	
Load from File	
Save to File	
Function Access	
Save List/Load List	
Save List	
Load List	
Function Access	
	00

#### Order

69

31

Cart	69
Add Requests to Cart	69
•	
Containers, Filefolders, and Tapes	
Bulk Items	70
Materials	71
Services	72
Reports	73
Imaging Request	
View/Edit Requests	
Place a Web Order/Workorder	
Check Out Web Order	
Check Out Workorder	82

Remove Requests from Cart	85
Remove Current Row	
Remove Selected Rows	
Order Status	
Search by Batch Order Number Range	87
Search by Tracking Number Range	
Search by Workorder Number Range	
Search by Ordered Date Range	
Search by Order Status	
Search by Ordered By	
Search Results	
Web Order Approvals	
Require Approval	
Approve/Reject an Order	
Rejected Orders	
Function Access	
Alerts	
Order Status Filter	
Order Detail Fields	

### Index

103

# **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.

	Please lo	gin to O'Neil Order below
Login Information		
Record Centers	Irvine Record Center	•
User Name	CURTIS	
Password	•••••	
MFA Code	0	
		Login
English	•	
		-

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.

MFA Resync Information	1
Record Center	Irvine Record Center
User Name	CAROL
Password	•••••
	Authentication token, the token may erver. Please enter two consecutive sync it.
Authentication Code 1	
Authentication Code 2	
	Resync and Login Cancel

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**.



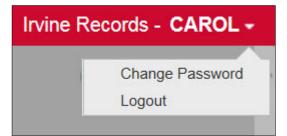
The Change Password dialog box appears.

Change Password	×
User Code	CAROL
Old Password	
New Password	
Confirm New Password	
MFA Code	
	Change Cancel

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.

×
kpired.
ОК

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

## Grids

O'Neil Order opens to the Search Inventory screen.

≡©O'Neil Order	Irvine Reco	rd Center - CURTIS -
	19 R Search Inventory clear search	equests in Cart <b>∖≣</b> /
	Type text here to search inventory Search	
Filtered Search	亚 計 計 前 億	>
Inventory Type	Image: Note of the image of	Materials Materials Services Reports Inventory Add Container Add Filefolder Add Tape Global Edit Container Filefolder Tape Options Excort Grid Print Grid Images Order Status User Admin
	Image: With the state of th	Order Approvals
+		

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.

10 v items per page 1 - 10 of 11859 items 🔿
---

### 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.

						Searc	h Invent	Ory <u>clear search</u>			67 Requ	iests in Cart 📜
Type text here to search inventory Search												
Filtered Search									<u>.</u> 25		¥ ©	
Inventory Type -	•					Item Code	Alternate Code	Add Date Time	Destroy D	Current Status	Statu	Order
clear		1	Ψ	۰	~	<u>134704</u>		1/13/1999 12:00 AM	9/9/2003	In	12/13 🔺	Bulk Items
Filter counts not available.			Ϋ́	•	$\sim \sim$	<u>134705</u>		1/13/1999 12:00 AM	9/9/2003	In	12/13	Materials
		3	Ϋ́	۰	$\sim$	<u>134706</u>		1/13/1999 12:00 AM	9/9/2003	In	12/13	
Container		4	Ϋ́	•	<u>^</u> «	<u>134802</u>	P435675	2/8/2000 12:00 AM	9/17/2010	In	9/17/	Services
Filefolder     Tape			Ϋ́	۰	$\sim$	<u>134804</u>	P435231	2/8/2000 12:00 AM	5/16/2007	In	9/17/	Reports
Tape		6	Ϋ́	•	<u>^</u> «	<u>134806</u>	P435685	2/8/2000 12:00 AM	5/16/2007	In	12/13	
Specific Inventory Type +			Ϋ́	۰	$\sim \sim$	<u>134808</u>	P435839	2/8/2000 12:00 AM	9/17/2010	In	12/13	Inventory
Specific Inventory Type Manual +		8	Ϋ́	•	$\sim \sim$	<u>134812</u>	P435667-C	2/8/2000 12:00 AM	9/17/2010	In	12/13	Add Container
		9	Ϋ́	۰	$\sim \sim$	<u>134821</u>	P435543	2/8/2000 12:00 AM	9/17/2010	In	3/16/2	Add Filefolder
Item Status -		10	Ϋ́	•	$\sim \sim$	<u>134823</u>	P435982	2/8/2000 12:00 AM	5/16/2007	In	3/16/2	Add Tape
clear		11	Ϋ́	۰	$\sim 10^{-10}$	<u>438300</u>	X1000	8/17/1900 12:00 AM	1/1/1905	In	8/21/	Add Tabe
Filter counts not available.			₩	•	<u>^</u>	<u>134730</u>		2/15/2000 12:00 AM	3/31/1901	In	12/13	Global Edit
		13	Ϋ́	•	<u>^</u>	<u>134731</u>		2/15/2000 12:00 AM	3/31/1901	In	12/13	Container
Destroyed			₩	•	~	<u>134732</u>		2/15/2000 12:00 AM	3/31/1901	In	4/22/	
In		45	16			404704		2/45/2000 42:00 444	2/24/4004	1-	40/40	Filefolder

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 🕇	ltem Code ↓	Alternate Code
1001	<u>438305</u>	
1001	<u>438304</u>	
1001	<u>438303</u>	
1001	<u>438302</u>	142
1001	438300	X1000
2000	<u>568234</u>	
2000	<u>134647</u>	
2000	134646	
2000	<u>134645</u>	
2000	134644	
2000	134643	
2000	134642	
2000	134641	
2000	134640	
2000	134630	

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.

Alternate Code	Ac + Statu	is itatus	Short Description
	9/29/2000	In	
	5/17/2016	Pending	
	5/17/2016	Pending	
	5/17/2016	Pending	
	5/16/2016	Pending	
	5/17/2016	Pending	
	5/17/2016	Pending	
154	4/22/2000	In	

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.

					Searc	h Inven	tory <u>clear se</u>	arch		67 Requ	iests in Cart 📜
		Type te	xt here	to sea	arch inventory	(		Sea	rch		
Filtered Search								30 E	)- D- D- )- D- D-	¥ 🚳	
Inventory Type -	-				Account †	Item Code	Alternate Code	Add Date Time	Destroy D	Cu Cr	oose Column Format
clear		1 \₩	•	<u>^</u>	1000	134502	PPP	4/21/2000 12:00 AM	10/30/1999	In Cł	oose Sort Format
Filter counts not available.	1	2	•	~	1000	134503	148	4/21/2000 12:00 AM	10/30/2000	In	Materials
		3 \₩	•	<u>^</u>	1000	134701	154	4/22/2000 12:00 AM	12/31/2003	In	
Container		4 \⊭	-	~	1000	<u>134521</u>	161	4/23/2000 12:00 AM	12/31/2004	In	Services
Filefolder	1	5 \₩	•	~	1000	356982		5/5/2006 8:49 AM		In	Reports
Tape		6 \₩	-	~	1000	<u>985631</u>		5/5/2006 8:49 AM		In	
Specific Inventory Type +		7 \₩	•	$\sim$	1000	<u>12 -ZX</u>		9/23/2005 10:13 AM		In	Inventory
Specific Inventory Type Manual +	1	8 ₩	-	~	1000	<u>961123</u>		11/1/2006 9:26 AM		In	Add Container
Specific Inventory Type Manual +	1	9 \₩	•	$\sim$	1000	2136987892		4/17/2009 8:41 AM		In	Add Filefolder
Item Status -	1	0 ₩	•	~~	1000\5000	134511	137	4/23/2000 12:00 AM	12/31/2003	In	
clear	1	11 \₩	•	<u>~</u>	1000\5000	134504	TTT	4/21/2000 12:00 AM	8/14/2001	In	Add Tape
Filter counts not available	1	2 ₩	•	2	1000\5000	134506	151	4/21/2000 12:00 AM	10/30/2000	In	Global Edit
	1	з 🖞	•	<u>~</u>	1000\5000	134508	153	4/21/2000 12:00 AM	8/14/2001	In	Container
Destroyed	1	4 ₩	•	~	1001	438300	X1000	8/17/1900 12:00 AM	1/1/1905	In	
🔽 In		- 14	-		4004	100005		0/40/2000 44-20 444		1.4	

#### **Choose Column Format**

The Column Format determines which columns appear in the grid.

Column Format		×
Column Format	DEFAULT_VIEW_STD *	<b>•</b>
		OK Cancel

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.

Sort Format		×	:
Sort Format	Account Code / Alt Code	•	*
		OK Cancel	

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**

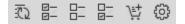
Right click on a row to bring up a context menu.

					Sear	ch Inver	ntory <u>clear s</u>	earch			67 Re	quests in Cart 📜
	Type text here to search inventory					Sea	rch					
Filtered Search 🔹 clear filters						Edit			<u>.</u>		¥ ()	
Inventory Type -					ACCC	Select All			Date Time	Destroy D	Currer	Order
clear	1	Ϋ́	•	<u>~</u>	100	Unselect All			2000 12:00 AM	10/30/1999	In 🗠	Bulk Items
Filter counts not available.	2	Ť	•		100	Invert All			2000 12:00 AM	10/30/2000	In	Materials
	3	Ϋ́	•	<u>~</u>	100	Add Item to Car	t		2000 12:00 AM	12/31/2003	In	
Container	4	Ϋ́	٥	~	100	Add Selected Ite	ems to Cart		2000 12:00 AM	12/31/2004	In	Services
Filefolder	5	Ŵ	۰	<u>~</u>	100	View Item Activi	tv		006 8:49 AM		In	Reports
Tape	6	Ϋ́	۰	<u>~</u>	100				006 8:49 AM		In	
Specific Inventory Type +	7	₩	•	$\sim$	100	View Item Filefo	iders		2005 10:13 AM		In	Inventory
Specific Inventory Type Manual +	8	Ϋ́	•	~	100	View Item Tape:	5		2006 9:26 AM		In	Add Container
	9	Ϋ́	•	<u>~</u> s	100	View Images for	Selected Items		2009 8:41 AM		In	Add Filefolder
Item Status -	10	Ŵ	•	<u>~</u>	100		for Selected Ite		2000 12:00 AM	12/31/2003	In	A did Torre
clear	11	Ϋ́	۰	<u>~</u> s	100	View Tapes for \$	Selected Items		2000 12:00 AM	8/14/2001	In	Add Tape
Filter counts not available.	12	₩	•		1000/5000		151		/2000 12:00 AM	10/30/2000	In	Global Edit
	13	Ϋ́	•	<u>^</u>	1000\5000	134508	153	4/21	/2000 12:00 AM	8/14/2001	In	Container
<ul> <li>Destroyed</li> </ul>		24			4004	420200	¥4000	0.47	4000 42.00 444	41414005	la.	

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.

#### lcons

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.

	⊡·×
E.X	w.X

Clear Selected: Clears all selected items from the grid.

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

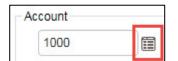
# **Dialog Boxes**

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

Container Add		□ ×
Description Contents		
		Form RSWeb.NET Container Add Intermediate 🔻
Current Status Pending		
Account	Barcode *	Alternate Code
Level 1		
Level 2		
Level 3		
Contents Range Start	Contents Range End	Contents Start Date
Contents End Date	Contents	Description
Destroy Date	Category	-
		Add Add to Cart Reset Cancel

### **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.

Recor	d Storage Ac	count	×
Option	s Search	Format	
0	P 😓		
	Account Code	Account Description	
1	1000	Newport Bank	*
2	2000	Insurance Company	
3	3000	Law Firm	
4	4000	Hospital	
5	1001	ABC Medical	
6	ABC CORP	ABC Corporation	
7	8000		
8	9000	Barrington Medical	
9	CITYHOSP	City Hospital	
10	XYZ CO		
			-
	1 🗸		Ċ

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.

-1	1 <mark>000</mark>	
=	1000	
Bai	1001	

### **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.

Contents End Date			Ē				
	•		Ju	ıly 202	20		•
	Su	Мо	Tu	We	Th	Fr	Sa
	28	29	30	1	2	3	4
	5	6	7	8	9	10	11
	12	13	14	15	16	17	18
	19	20	21	22	23	24	25
	26	27	28	29	30	31	1
	2	3	4	5	6	7	8
		M	onday	, July	6, 20	20	

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.

•	20	20	•
Jan	Feb	Mar	Apr
May	Jun	Jul	Aug
Sep	Oct	Nov	Dec
N	londay, Ji	uly 6, 202	0

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.

Requested Fulfillment		<b>:</b> •	
-----------------------	--	------------	--

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.

Barcode	63256

Click the icon to view the message.

Account		
1000	Data Entry Errors	×
Barcode	Invalid barcode length er	ntered for item
Alternate Code		

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.

Container Edit				Ð	×
Description	Contents			Form Errors ×	
Account 1000			Item S Status	General A Item's account (1000) does not match the account defined in the account range (4000) Acknowledge	1
Barcode	134820		Add Da	ate 2/8/2000 12:00 AM	
Alternate Code	P566321		User D	Defined	

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.

Export Grid		×
Print Format		
Number of fields:	8	*
Format		
Delimited		
Delimiter		
Vertical Bar		
🔾 Comma		
🔿 Tab		
<ul> <li>Semicolon</li> </ul>		
◯ Other		
🗹 Quotes around field	is	
⊖ Fixed		
Record Length:	129	
	ОКСа	ancel

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**.

Margins		
Left	0.25	×
Right	0.25	*
Тор	0.25	*
Bottom	0.25	×

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.

Export		×
Completed.		~
Records Exported:	52	~
		Close

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.

Print Grid				×
Heading ( Description ( Column Heading Font Name Font Size Bold	Font Arial V 12 V Italics Underline	Page Settings Margins Left Right Top Bottom	0.25 <b>+</b> 0.25 <b>+</b> 0.25 <b>+</b> 0.25 <b>+</b> 0.25 <b>+</b>	
Column Detail Fo	nt	Paper Size	Letter (8.5 in. by 11 in.)	
Font Name	Arial	Orientation	Portrait 🔻	
Font Size	10 🔻	Output Format	PDF 🔻	
		Border Around C	Cells 🗌 Shade Alternate Rows	-
			Print Can	cel

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 Ad	lded on 4/21/2000			=
Account	Barcode	Alternate Code	Short Description	Add Date	Destroy Date	j _
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 ADD				×
Clone Settings				
User Code	CAROLI	Language	English	
Password	•••••	User Status	Active	Ŧ
Confirm Password		Item Security Code	<b></b>	
Require Password Chang	e			
Last Name				
First Name				- 1
O'Neil Order				
Web Order Requires App	roval			
Alert Layout	•			
Model Users				
Account Model	Ē	Web Model		- 1
Function Model	Ē	O'Neil Mobile M		
Notification Addresses				- 1
Email				
User Policy Info				_
Last Password Change	Ē	Invalid Login Attempts	0	×
Last Invalid Password				
			Ad	Id Cancel

#### **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.

Clone User Information			×
Source User	Source User - Web Settings		
Account Access List	Web Forms		
Function Access List	Column Format Groups		
Report Formats	Default Column Formats		
	Sort Format Groups		
	Query Groups		
		ОК	Cancel

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**.

User EDIT							×
Clone Settings							
User Code	MARY		Language		Spanis	h	
New Password			User Status		Active	•	
Confirm New Password			Item Security Cod	e	99		
Require Password Char	nge						
Last Name Andrews							
First Name Mary							
O'Neil Order							
Web Order Requires Ap	proval						
Alert Layout		•					
Model Users							
Account Model	Ē	We	b Model				
Function Model	<b></b>	0'N	leil Mobile M				
Notification Addresses							
Email							
User Policy Info							
	3/6/2019 8:12 AM				0	*	
Last Invalid Password	1/1/1900 12:00 AM			ocked Out			
							- · · ·
						Edit	Cancel

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.

User Global Edit	>	<
<ul> <li>User Status</li> </ul>	Active	^
Item Security Code		
Language Description	English	
Account Model User Code		
Function Model User Code		
Web Model User Code		
Password Change Required	No 🔻	
Web Order Requires Approval	No 🔻	
Alert Layout	•	
O'Neil Mobile Model User Code		
	Global Edit Cance	

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.

Global Edit	×
Cannot global edit the currently logged in user	
Show details	•
ОК ОК	To All

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.

Dele	te User 🛛 🗙	
?	Delete Current User	?
	Yes No	

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**.

Dele	te Selected Users $ imes$
?	Delete 2 Selected Users?
	Yes No

# 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**.

Model User ADD	×
Clone Settings	
User Code	
Last Name	
O'Neil Order       O'Neil Order       Web Order Requires Approval       Alert Layout	•
Add	ancel

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.

Clone User Information			×
Source User	Source User - Web Settings		-
Account Access List	Web Forms	<b></b>	
Function Access List	Column Format Groups		
	Sort Format Groups	<b>a</b>	
	Query Groups		-
		OKCan	

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**.

		Feature	Permission	Access	Options
1	ø	Account Access	Edit	Yes	 Global Edit
2	đ	Account Access	Global Edit	No	Export Grid
3	∎ <b>i</b>	Account Access	Grid	No	 <u>Export ond</u>
4	1	Account Access	View	Yes	Print Grid
5		Cart	Add Bulk Items Notes	No	
6	∎ <b>i</b>	Cart	Add Bulk Items Pickup	No	
7		Cart	Add Bulk Items Receive	No	
8		Cart	Add Container Bulk Items	No	
9		Cart	Add Container Imaging	No	
10	∎ <b>i</b>	Cart	Add Filefolder Bulk Items	No	
11	P	Cart	Add Filefolder Imaging	No	
12	P	Cart	Add Item Access	No	
13	1	Cart	Add Item Deliver	No	
14	EA.	Cart	Add Item Destroy	No	

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.

O'Neil Order Funct	ion Access Edit	×
User Type	Web User	
Feature	Cart	
Permission	Add Bulk Items Receive	
Access	No 🔻	-
	Edit	ancel

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.

O'Neil Order Function Access Global Edit					
Access	No	•	* *		
	GI	obal Edit C	ancel		

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**.

< Us	er Ac	dmin				^
		Ac	count Acc	cess - MARY		
					0- 0-	
		Account	Access			Options
1	Ø	1000	No		<b>^</b>	Global Edit
2	ø	1001	No			Export Grid
3	ď	2000	No			Print Grid
4	ø	2025	No			
5	ø	3000	No			
6	ø	4000	Yes			
7	×.	5500	No			
8	đ	8000	No			
9	ľ	9000	No			
10	<b>P</b>	9001	No			
11	ŧ.	9002	No			
12	ø	9003	No			
13	ø	9004	No			
14	Ø	9005	No			
15		9006	No		•	
	)(1	► ► 100 ▼ items per pag	e	1 - 86 of 86 items	Ç	
						Close

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.

MARY AG	count Acces	s Edit		×
	Account			-
Level 1	3000			
Level 2				
Access	No	•		
			Edit	ancel

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.

Account Acc	ess Glob	al Edit			×
Access	No	•			+
			Global Edit	Cano	el:

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.

Cart Access Edit		×
Allow Admin to Modify Cart	Yes 🔻	*
	Edit	el

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.

Global Edit	×
Cannot edit Cart Access of the currently logged in user	
Show details	
OK OK T	o All

## 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**.

List Save			×	
List Name	My Users			•
Lists				
		-		
		Ŧ		
	5	Save	Cancel	)

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**.

List Load				×
List Name	My Users			*
Lists				
My Users		×	*	
			٣	-
	Load	Ca	ance	el

Select the list you want to load and click  $\ensuremath{\textbf{Load}}$  . The list of items is loaded onto the grid.

To delete lists from this dialog box, click the  ${\bf X}$  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.

			Sea	rch Invent	Ory clear search			19 Requ	uests in Cart 📜
		Type text he	re to search inven	tory		Search			
Filtered Search	ters						<u>a</u> = = = =	\$	
Inventory Type  Clear  Container  Foleotider  Specific Inventory Type Manual Item Status  Account Code Range  Add Date  Destroy Date Status Date  From/To Date Sequence Range  Perm Flag	- ^ + + + + + + + + + + + + + + + + + +		Item Code	Alternate Code	Add Date Time	Destroy D		Status (	Order Buik Items Materials Stenciess Recorts Inventory Add Centainer Add Floridiar Add Floridiar Add Floridiar Add Floridiar Global Edit Continner Floridiar Floridiar Pototons Essert Gold Imaross
4	* H (	0	<ul><li>I 100 ▼</li></ul>	items per page			No items to disp	ay C	Order Status User Admin Order Approvals
							Check Out	Neb Order	Check Out Workorder

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

Filtered Search         Filtered Search         Advanced Search         ○         Container         ○         Filefolder         ○         Tape	<u>clear filters</u>
Specific Inventory Type	e Manual 🕂
Item Status	+
Associat Code Dapas	

# **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.

Filtered Search 🔻	ar filt	ters
Inventory Type	-	*
clear Container Filefolder Tape		
Specific Inventory Type Manual	+	
Item Status	+	
Account Code Range	+	
Add Date	+	
Destroy Date	+	
Status Date	+	
From/To Date	+	
Sequence Range	+	
Perm Flag	+	

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.

Account Code	-
<b>1000</b> (38)	
+ <u>2000</u> √ ⊗	
<b>3000</b> (58)	
- □ 4000 (4) ✓ ⊗	
<b>300</b> (2)	
<b>400</b> (18)	

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.

Inver	-	
<u>clear</u>		
~	Container (132)	
	Filefolder (147)	
	Tape (115)	

### 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 -			
<u>clear</u> - C	ontainer 🗸 🛇		
	Container (24) Letter\Legal Box (104) 8MM Tape Small Tote (4)		

### Specific Inventory Type Manual

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

Specific Inventory	Type Manual –
<u>clear</u>	

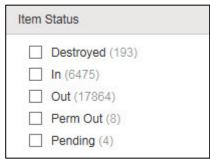
Click the grid picker to display the **Object** grid.

Recor	rd Storage O	bject		×
Option	is Search	Format		
	🎦 🕎			
	Object Code	Object Description	Unit Volume	
1	1.2 BOX	1.2 Cu Ft Container	1.200000000	*
2	3460	3460	0.000000000	
3	3480	3480	0.000000000	
4	8 MM FILM	8 MM Film	0.000000000	
5	ARCHIVE	One Cube	0.000000000	
6	BOX-CT	Box-Check Transfer	0.000000000	
7	BOX-HIS	Box-High Security	0.000000000	
8	BOX-STD	Box-Standard File	0.000000000	
9	BOX-TP	Box-Tape Storage	0.000000000	
10	CHECK B	Check Box	0.000000000	
				Ŧ
	+			•
	) [ 1 🗸			C

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	-
<b>3000</b> (66906)	
- □ 4000 (6) ✓ ⊗	
<b>300</b> (2)	
<b>400</b> (19)	

### Account Code Range

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

Account Code	Range -
clear Level 1 From	То
Level 2 From	To
Level 3 From	То
Include Sub Apply	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.

Add Date	-
<u>clear</u>	
•	
From date	
To date	
Apply	

Select from the available options.

Any Date
Last 7 days
Yesterday
Today
Tomorrow
Next 7 days
Between

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.

٩	August 2020 🕨						
Su	Мо	Tu	We	Th	Fr	Sa	
26	27	28	29	30	31	1	
2	3	4	5	6	7	8	
9	10	11	12	13	14	15	
16	17	18	19	20	21	22	
23	24	25	26	27	28	29	
30	31	1	2	3	4	5	
Wednesday, August 5, 2020							

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.

Destroy Date	-
<u>clear</u>	
	•
From date	
To date	
Apply	_

Select from the available options.

Any Date
Last 7 days
Yesterday
Today
Tomorrow
Next 7 days
Between
Blank Date

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.

٩	<ul> <li>August 2020 ►</li> </ul>							
Su	Мо	Tu	We	Th	Fr	Sa		
26	27	28	29	30	31	1		
2	3	4	5	6	7	8		
9	10	11	12	13	14	15		
16	17	18	19	20	21	22		
23	24	25	26	27	28	29		
30	31	1	2	3	4	5		
Wednesday, August 5, 2020								

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.

Status Date	-
<u>clear</u>	
	•
From date	
To date	
Apply	

Select from the available options.

Any Date
Last 7 days
Yesterday
Today
Tomorrow
Next 7 days
Between

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.

<ul> <li>August 2020 ►</li> </ul>							
Su	Мо	Tu	We	Th	Fr	Sa	
26	27	28	29	30	31	1	
2	3	4	5	6	7	8	
9	10	11	12	13	14	15	
16	17	18	19	20	21	22	
23	24	25	26	27	28	29	
30	31	1	2	3	4	5	
Wednesday, August 5, 2020							

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.

From/To Date	-
<u>clear</u>	
Enter a date within From/To	

#### 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.

Sequence Range	I.
<u>clear</u>	
Within Sequence Begin/End	

#### 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.

Perm Flag	-
<b>No</b> (92)	
<b>Yes</b> (23)	

## **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.

() Your search exceeded the maximum number of × results. Only 5,000 records can be displayed.

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.

Search Filter	clear filters
Inventory Type	- 🔬
<u>clear</u> Filter counts not available.	
<ul><li>Container</li><li>Filefolder</li><li>Tape</li></ul>	
Specific Inventory Type	+
Specific Inventory Type Man	ual +

# **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.

67 Reques								uests in Cart 📜
Advanced Search 🔻					E	- 0- 0- 0- - 0- 0- 0×	B× ₩ ©	
Quick Query		Item Code	Alternate Code	Add Date Time	Destroy D	Current Status	Status Date	Order
Containers Account (Contai 🔻							-	Bulk Items
Description								Materials
A list of containers by level 1 account code								Services
								Reports
								Inventory
								Add Container
								Add Filefolder
								Add Tape
								Global Edit
Clear All Items on Grid Parameters								
Account No.								
1000								
Search								Options
								Load From File
Search Results							+	Load List
Matched Added	R .	• • • •	100 🔻 items p	er page		No items	to 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.

#### lcons

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.

67 Requests							uests in Cart 📜				
I	ype t	text I	nere	to s	eard	ch restricted in	ventory		Sea	arch	
Filtered Search								i			
Restriction -	<b>^</b>					Item Code	Alternate Code	Add Date Time	Destroy D	Current Stat	Order
clear		1	ě	•	~~	<u>543216</u>		5/5/2006 8:49		Destroyed 🔺	Bulk Items
		2	Ϋ́	•	~	<u>12 -ZX</u>		9/23/2005 10:		In	Materials
Restricted to 54 items 🕜		3	λĥ	•	<u>^</u> ,	<u>2136987</u>		4/17/2009 8:4		In	
Inventory Type -		4	Ϋ́	۰	<u>^</u> %	356982		5/5/2006 8:49		In	Services
clear		5	Ť	۰	Å.	<u>123659</u>		5/5/2006 8:49		Out	Reports
		6	λĥ	۰	$\sim$	200056		11/3/2003 1:3	11/3/2006	Out	
Container (54)		7	Ϋ́	۰	<u>^</u> _	215698		5/5/2006 8:49		Out	Inventory
Specific Inventory Type -		8	Ϋ́	•	~~	236500		11/13/2008 2:		Out	Add Container
		9	ŭ	•	<u>^</u> «	269856		5/5/2006 8:49		Out	Add Filefolder
<u>clear</u>		10	14			333659		6/20/2005 8:3		Out	

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**.

Container Add				□ ×
Description Contents				
		Form Container /	Add Complete	•
Current Status Pending	Container Type CONTAIN	NER		
Account Level 1 III Level 2 III Level 3 III	Barcode *	Alternate Code		
Destroy Date	Contents Range Start	Contents Range End		
Contents Start Date	Contents End Date	Custom Field 1		
Custom Field 2	Custom Field 3	Custom Field 4		
Custom Date	Category	Record Series		
Set Name	Description	Contents		
Permanent Item * No 💌				
		Add	d Add to Cart Reset	Cancel

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.

Container Add		
Description Contents		
		Form
Current Status Pending	Data Entry Errors         ×           'Barcode *' field is required	
Account	Barcode *	Alternate Co
Level 1 2000		

#### 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**.

Container Edit				
Description Contents				
			Form RSWeb.NET Container Edit Compl	ete 🔻
Current Status In	Status Date 4/3/2012	2	Add Date 5/5/2006	
Container Type CONTAINER				
Account * Level 1 1000  E Level 2  E	Barcode *	356982	Alternate Code	
Contents Range Start	Contents Range End		Contents Start Date	1
Contents End Date	Destroy Date	Ť.	Category	
Set Name	Record Series		Custom Field 1	
Custom Field 2	Custom Field 3		Custom Field 4	
Custom Date	Description		Contents	

**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.

Filefolder Add							
Description Contents	s						
				Form	Filefolder	Add Complete	•
Current Status Pendi	ng						
Account		Barcode *		Alternate Co	de		
Level 1							
Level 2							
Level 3							
Short Description		Container Barcode		Custom Field	i 1		
Custom Field 2		Custom Field 3		Custom Field	14		
Custom Date	Ť3	Contents Range Start		Contents Ra	nge End		
Contents Start Date	Ċ.	Contents End Date	ti i	Category			
Record Series		Set Name		Destroy Date	9		
Permanent Item *	10 <b>v</b>	Description		Contents			
					A	dd Add to Cart	Reset Canc

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.

Filefolder Add			
Description Contents			
			Form
Current Status Pending		Data Entry Errors × 'Barcode *' field is required	
Account		Barcode *	Alternate
Level 1			
Level 2			
Level 3			
Short Description		Container Barcode	Custom

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.

Filefolder Edit						□ ×
Description Contents						
			Form	RSWeb.NET Filef	older Edit Intermediate	<b>v</b>
Account           Level 1         4000           Level 2         400           Level 3	Barcode	0000004	Cont	ainer Alternate Cod	e P435675	
Current Status In	Status Date	5/22/2008	Add	Date	4/24/2000	
Category	Set Name		Perm	anent Item	No	
Record Series PAY	Custom Field 1		Cust	om Field 2		
Custom Field 3	Custom Field 4		Cust	om Date		
Alternate Code 1123775	Short Description		Cont	ainer Barcode	134802	
Contents Range Start	Contents Range End	1	Cont	ents Start Date	Edit Reset	Cancel

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.

Description Contents					
			Form	TAPE Add Complete	•
Current Status Pending		Таре Туре ТАРЕ			
Level 1	Barcode *		Alternate Co	de	
Level 3					
Short Description	Container Barcode		Custom Field	11	
Custom Field 2	Custom Field 3		Custom Field	14	
Custom Date	Set Name		Contents Sta	art Date	
Contents End Date	Category		Contents Ra	nge Start	
Contents Range End	Destroy Date	t.	Record Serie	es	
	Contents		Permanent I	tem * No	•
Contents Range End					

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.

Tape Add		
Description Contents		
		Form RSV
Current Status Pending	Data Entry Errors × 'Barcode *' field is required	
Account	Barcode *	Alternate 0
Level 1		
Level 2		

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**.

Tape Edit			×
Description Contents			
Account Level 1 1000 Level 2 Level 3	Barcode 223658956	Таре Туре ТАРЕ	-
Container Alternate Code	Current Status Out	Status Date 12/5/2019	
Add Date 12/5/2019	Category	Permanent Item No	
Record Series	Custom Field 1	Custom Field 2	
Custom Field 3	Custom Field 4	Custom Date	
Alternate Code	Short Description	Container Barcode	
Set Name	Contents Range Start	Contents Range End	
Australia Alast Data (#2)	Ocalizate Card Date	Edit Reset Canc	.el

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.

Records Retention	×
CO Destroy Date and set the	s on Legal Hold. Click Yes to clear Permanent Flag to Yes. Click No to is and keep current Destroy Date and do lag.
	Yes No

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.

			T	ype te	xt here to se	earch inver	ntory			Search			
Filtered Search 👻	clear filters									To 8=	맘 말 맛	0	
Item Status	+ ^				Account	Barcode	Alternate Code	Container Barc	Container Alter	Destroy D	Contents Ran	g	Options
Add Date	+	1	₩	~	4000\400	0000001	1123896	134802	P435675			-	Add Filefolder
		2	Ä	$\sim$	4000\400	0000002	1123997	134802	P435675				Global Edit
Destroy Date	+	3	₩	$\sim$	4000\400	0000003	1123986	134802	P435675				
Status Date	+	4	Ä	<u>~</u>	4000\400			134802	P435675				
From/To Date	+	5	Ä	~	4000\400	0000005		134802	P435675				
Comunes Dense		6	Ä	~	4000\400	0000006		134802	P435675				Images
Sequence Range	+	7	₩	<u>~</u>	4000\400	0000007		134802	P435675				
Perm Flag	+	8	₩		4000\400	0000008	1123448	134802	P435675				
		9	Ϋ́		4000\400	0000009		134802	P435675				
		10	Ä		4000\400	0000010		134802	P435675				
		11	Ŵ		4000\400	0000011		134802	P435675				
		12	₩	<u>~</u>	4000\400	0000012	1124556	134802	P435675				
					4							+	
	-		4				items per page				12 of 12 items	C	

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**.

	tivity					
Date/Time	Activity	Workorder Number	Workorder Create Date/Time	Workorder Required By D	Requestor	
08/13/2007 02:55:23PM	Delivery	11125104	08/13/2007 02:54:51PM			
11/01/2006 09:53:08AM	Add					
11/01/2006 09:26:06AM	Pickup	00000321	11/01/2006 09:26:00AM		Cathie	
						·

**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.

						Sea	irch	In	ventor	clear search		6	7 Req	uests in Cart 📜
			Тур	e text I	nere to	search inver	ntory				Search			
Filtered Search	<u>rs</u>										R) #	: 맘 말 벚	0	
Inventory Type						Item Code		Alten	nate Code	Add Date Time	Destroy D	Current Status		Order
clear		1/	₩	-		100987				4/8/2015 8:59 AM		Pending		Bulk Items
		18	Ŵ	۰		<u>103452</u>				4/8/2015 9:20 AM		Pending		Matorials
Filter counts not available.		19	Ŵ	۲		<u>111223</u>				5/18/2004 2:51 PM		Out		Materials
Container		20	Ä	۲		<u>12 -ZX</u>				9/23/2005 10:13 AM		In		Services
Filefolder		21	Ä	۰	$\sim$	<u>122222</u>				11/28/2001 12:00 AM	11/28/2006	In		Reports
Tape		22	Ϋ́	•		123500				6/19/2006 3:01 PM		Out		11000110
Specific Inventory Type	+	23	Ť	•		123659			Edit	C/C/D0000-0-40-444	-	Out		Inventory
opecine inventory type	F	24	Ϋ́	•		134500		XY	E.UIL		/14/2001	Out		Add Container
Specific Inventory Type Manual	+	25	Ϋ́	۲		134501		XY	Select Al		/14/2001	Out		
Item Status	+	26	Ϋ́	٦		134502		PP	Unselect	All	0/30/2020	In		Add Filefolder
		27	Ť	•	~	134503		14	Invert All		0/30/2000	In		Add Tape
Account Code -	+	28	V			134504		TT	Add Item	to Cart	/14/2001	In		
Account Code Range	+	29				134505		MN		cted Items to Cart	/14/2001	Out		Global Edit
Add Date -		30	¥			134506		15			0/30/2000	In		Container
Add Date .	+	31	i. ă	1		134507		16	View Iter	n Activity	314/2001	Out		
Destroy Date	+	32	¥			134508		15		n Images	14/2001	In		
Status Date	+	33	ž.			134509		135	View Iter	- Filefolders	2/31/2003	Out		
		34	₩	1		134510		130	View Iter	n Tapes	2/31/2003	Out		Options
From/To Date	+	35	₩	1		134510		13	View Ima	ges for Selected Items	2/31/2003	In		
Sequence Range	+	35	ŭ.			134512		13/	View File	folders for Selected Items		Out		Export Grid
				_	-				View Tap	es for Selected Items				Print Grid
Perm Flag	+	37	Ň			134513		135			2/31/2003	Out		Images
		38	Ť	9	1	134514		140		4/23/2000 12:00 AM	12/31/2003	Out	, Ť	1119725
	-	0	1	2	2		100	•				00 of 237 items	C	Order Status
4	۶.	(M)(		2	3		100	•	items per pag	le	1-1	00 01 257 Items	0	Hear Admin
												Check Out Web	Order	Check Out Worko
												Check Out web	order	Check Out Workd

## 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**.

			Search								
arch Filter	clear filters						R = =				
ndex Field Date 1	_ ^				Seq	Reference	Description	Add Date	Scanned By	Image .	Options
ar		1	×	ø	1		Japan itinerary	10/30/2	T. Smith	413377 ^	
•		2	×	ø	2			1/27/2011	SA	24487	
m date		3	×	ø	3	Internet CI	O'Neil internet cloud di	1/27/2011	SA	184396	
		4	×	ø	4			1/27/2011	SA	281107	
		5	×	ø	5			1/27/2011	SA	255304	
		6	×	ø	6			1/27/2011	SA	181407	
		7	×	ø	7			1/27/2011	SA	11542 🗸	
dex Field Date 2	+				•					۱.	
	<b>_</b>		(1)	1		▶ 100	<ul> <li>items per page</li> </ul>		1 - 19 of 19 ite	ems 🔿	

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 Inventory	y						Images de	ar search					
			1	Type te	xt her	e to search ir	nventory			Searc	h		
Search Filter	clear filters									<u>37</u> 2		= <u> </u>	
Index Field Date 1	-	-				Reference	Description	Sequence	Image Type	Image Size	Add Date	Account	Options
clear		1	1	×	F	Tours	Itinerary for Kg-1 Tour	1	TIFF	2482	6/7/2011	1000 🔺	
			2	×	ŧ.		India Itinerary	2	PDF	24487	1/27/2011	1000	
•			3	×	Ē			5	TIFF	2553048	1/27/2011	1000	
			4	×	E.	Cruises	Cruise routes	7	PNG	11542	1/27/2011	1000	
			5	×	P			8	GIF	23059	1/27/2011	1000	
			6	×	ø			1	TIFF	1052898	3/4/2011	1000	
Apply			7	×	đ			1	PNG	11542	3/4/2013	4000\40	
Index Field Date 2	+												
Image Type	+												
Add Date	+												
Purge Date	+												
Purged	+												
												-	
						4						•	
4	ŀ	*	H) (+	01	•	H 100	0 🔻 items per page				1 - 7 of 7	items 🖒	
													Clo

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.

Image Edit	□ ×
Open In New Tab	
Contained In Container Filefolder Document Code 123659	
Sequence 1 🖨 Auto Sequence	
Image Info	
Reference	
Description Japan itinerary	
Index Field 1	
Index Field 2	
Index Field 3	
Index Field 4	
Index Field 5	
Index Field 6	
Index Field 7	
Index Field 8	
Index Field Date 1	✓
Index Field Date 2	View Full Image Download Image
	Edit Reset Cancel

**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.

	HE BEST OF TOHOKU & HOKKAIDO 2007 (FALL FOLIAGE & ONSEN MEGURI)						
	ITINERARY						
SEPTEMBER 27 THURSDAY	SAN FRANCISCO DEPARTURE						
11:00 AM	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 8:20 AM	After breakfast at the hotel, transfer to Tokyo Central Station. Leave for Sendai by JR Bullet Train "Yamabiko No. 45" with reserved tourist class non-smoking seats.						
10:28 AM	cases more anothing seeks. Arrive at Sendi 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 bott ride across the Matsushima Bay from Shiogama Port to Matsushima Port. Afternoon visit Kanrantei, the wave viewing pavilism, 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	SENDAL - 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. Afternoor, 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 (B4./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 Jaran. Afternoon, continue year drive to Aomori visiting enroute the						
	salant. Alternoom, continue your drive to Aomori visibile 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.

<ul> <li>Search Inventory and C</li> </ul>	art					Images	s for Contain	er 123	659 <u>clear se</u>	<u>earch</u>				
					Type te	Type text here to search images Search								
Search Filter clear	clear filters 30 8= 8= 10													
Index Field Date 1					Sequ	Reference	Description	Add Date	Scanned By	Image	Image Ty	Purge Date	Inde	Options
clear		1	×	ø	1		Japan itinerary	10/30/2	T. Smith	413377	GIF		*	
•		2	×	ø	2			1/27/2011	SA	24487	PDF			
		3	×	ø	3	Internet CI	O'Neil internet clou	1/27/2011	SA	184396		11/29/2011		
*** 		4	×	e	4			1/27/2011	SA	281107		11/29/2011		
		5	×	ø	5			1/27/2011	SA	2553048	TIFF			
110 10		6	×	e	6			1/27/2011	SA	181407	JPEG			
		7	×	ø	7			1/27/2011	SA	11542	PNG			
Index Field Date 2	+	8	×	ø	8			1/27/2011	SA	23059	GIF			
Image Type	+ +	N		0		100 🔻	items per page				1.	- 19 of 19 items	Q	

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

Image Edit	□ ×
Open In New Tab	
Contained In Container O Filefolder O Document Code 123659	Image has been Purged
Sequence 12 Auto Sequence	
Image Info Reference Networks	
Description Server setup diagram	
Index Field 1	
Index Field 2	
Index Field 3 Index Field 4 Index Field 5	
	Edit Reset Cancel

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.

Delete Image ×						
? <sup>De</sup>	elete Current	Image?				
	Yes	No				

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**.

<b>ی</b> ا	on for 996325			
Matches	Keyword		Add	
Matches	Keyword	^	Edit	
Matches	Keyword	~		

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.

Add Keyword	×
Keyword	
	Add Cancel

Type your keyword and click **Add**.

	California exas leo footage of parkir	g lot and <b>reception</b> ar with color gain control		
Matches k	Keyword	Add	]	
2 c	alifornia	Edit	1	
1 c	mc 370	Delete		
1 p	arking	Delete		
1 n	eception	~		

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.

Description for 134811					
50	M	<b>₹</b> ,			

#### Enter the text you want to find.

Find		×
Find What		
	Match Case	Direction
		⊖ Up
	[	Find Next Cancel

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.

Descriptio	on for 1	134811
5	<u>الم</u>	в

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.

Replace			×
Find What	1		
Replace With			
	Match Ca	se	
Find Next	Replace	Replace All	Cancel

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**.

		×
ACK, JOHN AGANO, DOMINICK AGE, ELLEN ALLY, VINCNT AMA, KELLY ANGE, FRED ANGER, IAN ALEE, CHAU-YIN EIBOWITZ, ERIC EVY, IRA IMA, ROSE INTZ, DAVID OFTUS, JOE UKOWIAK, SUE YONS, WILLIAM YTWYN, MILLY		
	Current line: 16	Total lines: 16

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.

						Se	arch	Invent	ory		138	8 Requ	uests in Cart <b>∖⊒/ &gt;</b>
Advanced Search 🔻										0- 0- 0- 0-		; @	
Quick Query		<b>^</b>					Account	Item Code	Alternate Code	Destroy D	Contents Rang	Cor	Order
No FFs (Container)	•		1	ý	•	~	1000	<u>134529</u>	169	12/31/2004		-	Bulk Items
Description			2	₩	•	~	1000	<u>333659</u>					Materials
Container with no filefolders	li	l	3	Ä	٥		1000	200056		11/3/2006			Add Container Add Filefolder
<ul> <li>Clear All Items on Grid</li> </ul>		-											Add Tape
Parameters Enter Level 1 Account: 1000													Global Edit
Enter Level 2 Account:		Ŧ											Filefolder Tape
Search Results												-	Options
Matched							•					•	Load From File
Added				•	1		M	100 🔻	items per page		1 - 3 of 3 items	Ç	Save To 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.

Load From File							
Select files Dro	♪ p files here						
Item Type	Item 🔻						
Fields	Code 🔻						
Group duplicates at the e	nd						
- Delimiter							
Vertical Bar							
Comma							
🔵 Tab							
Semicolon							
Other	]						
	OK Cancel						

**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.

Lo	ad From File	×
	Select files Drop files here Done	Î
	SaveToFile_20190311_11 ×	*
		-

**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.

Status Completed.  Read: 11 Not Found: 0 Files Processed: 1  Options Item Type: Item Fields: Code  Items Not Found  Code Exception  Code Exception  () () () () () () () () () () () () () (	Load From File				×
Read: 11   Not Found: 0   Files Processed: 1   Options Item   Item Type: Item   Fields: Code   Tems Not Found   Code Exception     Items Not Found     Items Properties					
Not Found: 0 Files Processed: 1 Options Item Type: Item Fields: Code Items Not Found Code Exception	Completed.				
Files Processed: 1     Options   Item Type:   Items Not Found     Items Not Found     Code   Exception     Code   Exception     Image: Code     Image: Code <td>Read:</td> <td>11</td> <td></td> <td></td> <td></td>	Read:	11			
Options Item Type: Item Fields: Code Items Not Found Code Exception ↓ Code Exception ↓ 100 ↓ items per page No items to display ↓ Download Items not found on Close	Not Found:	0			
Item Type: Item Fields: Code Items Not Found Code Exception	Files Processed:	1			
Fields: Code Items Not Found Code Exception  Code United Structure					
Items Not Found					
Code       Exception         Image: Code       Exception         Image: Code       Image: Code	Fields:	Code			
O     O     IOO     items per page     No items to display     Download Items not found on Close	Items Not Found				
Download Items not found on Close	Code	Exception			
Download Items not found on Close					<b>^</b>
Download Items not found on Close					
Download Items not found on Close					
Download Items not found on Close					
Download Items not found on Close					
Download Items not found on Close					-
		H 100 V	items per page	No items to dis	play
	Download Items	not found on Close			
Close					Close

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.

Load From File			×
- Status Completed. Items not may be downloaded.	found are listed in the Table below. A list	of these Items	*
Read:	3		
Not Found:	3		
Files Processed:	1		
Options			
Item Type:	Item		
Fields:	Code		
Items Not Found			
Code	Exception		
ALTCODE_Z	Record does not exist.	*	
10045	Record does not exist.		
10086	Record does not exist.		
	► 100 ▼ items per page	1 - 3 of 3 items	
Download Items n	ot found on Close		-
		CI	ose

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.

Load From File			×
Status Completed. Results co	ntain 4 Items which have duplicates.		-
Read:	12		
Not Found:	0		
Files Processed:	1		
Options			
Item Type:	Item		
Fields:	Code		
Items Not Found			
Code	Exception		
			•
Download Items nd	► 100 ▼ items per page	No items to dis	play
L			Close

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.

Save To I	File	×
Fields	Code	<b>•</b>
		OK Cancel

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.

Export		×
Completed.		-
Records Exported:	11	-
		Close

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

Save As				
😋 🗢 🕿 🕨 Co	emputer 🔸 Local Disk (C:) 🕨 🔫	47	Search Local Disk	(C:)
File <u>n</u> ame:	SaveToFile_20190311_12_52_21.TXT			•
Save as <u>t</u> ype:	Text Document (*.TXT)			
Browse Folders			Save	Cancel

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**.

List Save				>	<
List Name	My Users				*
Lists					
			*		
			*		Ŧ
	s	ave	C	ance	

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**.

List Load				×
List Name	My Users			*
Lists				
My Users		×	*	
			Ψ.	-
	Load	C	ance	el

Select the list you want to load and click  $\ensuremath{\textbf{Load}}$  . The list of items is loaded onto the grid.

To delete lists from this dialog box, click the  ${\bf X}$  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**.

						Sea	rch Inve	entory <u>clear</u>	search		67 Req	uests in Cart 📜
			Type t	ext he	re to s	earch inven	tory		s	earch		
Filtered Search 🔹	Iters								3	52 8= 8=	E ☆ ©	
Inventory Type	- ^					Account	Item Code	Alternate Code	Add Date Time	Destroy D	Current Sta	Order
clear	- 11	1	₩	٦	<u>~s</u>	1001	438300	X1000	8/17/1900 12:00 AM	1/1/1905	In 🔺	Bulk Items
Filter counts not available.	- 11	2	Ϋ́	•	~	3000	<u>134704</u>		1/13/1999 12:00 AM	9/9/2003	In	Materials
	- 11	3	Ä	•	~	3000	134705		1/13/1999 12:00 AM	9/9/2003	In	
Container	- 11	4	Ϋ́	•	20	3000	134706		1/13/1999 12:00 AM	9/9/2003	In	Services
Filefolder Tape	- 11	5	Ϋ́	•	<u>~</u> s	4000\400	134802	P435675	2/8/2000 12:00 AM	9/17/2010	In	Reports
lape		6	₩	•	~	4000\400	134804	P435231	2/8/2000 12:00 AM	5/16/2007	In	
Specific Inventory Type	+	7	₩	•	~	4000\400	134806	P435685	2/8/2000 12:00 AM	5/16/2007	In	Inventory
Specific Inventory Type Manual		8	₩	•	2	4000\400	134808	P435839	2/8/2000 12:00 AM	9/17/2010	In	Add Container
Specific inventory Type Manua	+	9	₩	•	~	4000\400	134812	P435667-C	2/8/2000 12:00 AM	9/17/2010	In	Add Filefolder
Item Status	- 11	10	₩	•	2	4000\400	134821	P435543	2/8/2000 12:00 AM	9/17/2010	In	
clear		11	₩	-	$\sim$	4000\400	134823	P435982	2/8/2000 12:00 AM	5/16/2007	In	Add Tape
Filter counts not available.	- 11	12	₩	•	<u>~</u>	3000	134730		2/15/2000 12:00 AM	3/31/1901	In	Global Edit
	- 11	13	₩	۲	~	3000	134731		2/15/2000 12:00 AM	3/31/1901	In	Container
Destroyed	- 11	14	₩	•	2	3000	134732		2/15/2000 12:00 AM	3/31/1901	In	
🛃 In			11.	_	-							

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**.

					Sea	rch Inve	entory dear	search		67 Red	quests in Cart 📜
		Туре	text he	re to :	search inven	tory		5	Search		
Filtered Search									E = =	말 밖 😳	
Inventory Type -	*				Account	Item Code	Alternate Code	Add Date Time	Destroy D	Current Sta	Order
clear	1	Ϋ́	•		1001	438300	X1000	8/17/1900 12:00 AM	1/1/1905	In 🔶	Bulk Items
_	2	Ϋ́	•		3000	134704		1/13/1999 12:00 AM	9/9/2003	In	Materials
Filter counts not available.	3	Ϋ́	•		3000	134705		1/13/1999 12:00 AM	9/9/2003	In	moreners
Container	4	Ϋ́	•		3000	134706		1/13/1999 12:00 AM	9/9/2003	In	Services
Filefolder     Tape	5	Ϋ́	•	~	4000\400	134802	P435675	2/8/2000 12:00 AM	9/17/2010	In	Reports
Tape	6	Ϋ́	•		4000\400	134804	P435231	2/8/2000 12:00 AM	5/16/2007	In	
Specific Inventory Type +	7	Ŵ	•	~	4000\400	134806	P435685	2/8/2000 12:00 AM	5/16/2007	In	Inventory
Specific Inventory Type Manual +	8	Ŵ	•		4000\400	134808	P435839	2/8/2000 12:00 AM	9/17/2010	In	Add Container
Specific Inventory Type Manual +	9	Ŵ	•	~	4000\400	134812	P435667-C	2/8/2000 12:00 AM	9/17/2010	In	Add Filefolder
Item Status -	10	Ϋ́	•		4000\400	134821	P435543	2/8/2000 12:00 AM	9/17/2010	In	
clear	11	Ŵ	•		4000\400	134823	P435982	2/8/2000 12:00 AM	5/16/2007	In	Add Tape
Filter counts not available.	12	Ϋ́	•		3000	134730		2/15/2000 12:00 AM	3/31/1901	In	Global Edit
	13	Ŵ	•		3000	134731		2/15/2000 12:00 AM	3/31/1901	In	Container
Destroyed	14	¥	•		3000	134732		2/15/2000 12:00 AM	3/31/1901	In	
🖌 In		51.	-	-							Filefolder

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**.

Filtered Search	₩ 1	xt here to	Account	ltem Code	Alternate Code	3		E \\$ @	
Inventory Type -				Item Code	Alternate Code				
clear 1		•		Item Code	Alternate Code	Add Data Time			
2		•	4004			Aug Date Time	Destroy D	Current Sta	Order
2	₩ 1		1001	438300	X1000	8/17/1900 12:00 AM	1/1/1905	In 🔶	Bulk Items
			3000	134704		1/13/1999 12:00 AM	9/9/2003	In	Materials
3	₩ 1	•	3000	134705		1/13/1999 12:00 AM	9/9/2003	In	motorioro
Container 4	₩ 1	•	3000	134706		1/13/1999 12:00 AM	9/9/2003	In	Services
Filefolder 5	₩ 1	•	4000\400	134802	P435675	2/8/2000 12:00 AM	9/17/2010	In	Reports
Tape 6	₩ 1	•	4000\400	134804	P435231	2/8/2000 12:00 AM	5/16/2007	In	
Specific Inventory Type + 7	₩ 1	•	4000\400	134806	P435685	2/8/2000 12:00 AM	5/16/2007	In	Inventory
Specific Inventory Type Manual + 8	₩ 1	•	4000\400	134808	P435839	2/8/2000 12:00 AM	9/17/2010	In	Add Container
9	₩ 1	•	4000\400	134812	P435667-C	2/8/2000 12:00 AM	9/17/2010	In	Add Filefolder
Item Status - 10	₩ 1	•	4000\400	134821	P435543	2/8/2000 12:00 AM	9/17/2010	In	
clear 11	₩ 1	•	4000\400	134823	P435982	2/8/2000 12:00 AM	5/16/2007	In	Add Tape
Filter counts not available. 12	₩ 1	•	3000	134730		2/15/2000 12:00 AM	3/31/1901	In	Global Edit
13	₩ 1	•	3000	134731		2/15/2000 12:00 AM	3/31/1901	In	Container
Destroyed 14	₩ 1	•	3000	134732		2/15/2000 12:00 AM	3/31/1901	In	
🔽 İn									Filefolder

## **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	Pickup	(Pickup the item(s) at	my business.)	•
Container				
Quantity	0	*		
Comment				0
Filefolder				
Quantity	0	×		
Comment				<b>^</b>
Таре				
Quantity	0	A V		
Comment				$\hat{}$
Total	0			
			Add to Cart	Cancel

**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.

Add Material To	Cart >	<
Material	· · · · · · · · · · · · · · · · · · ·	*
Quantity	•	
Requestor		
Cost Center		
Comment		-
	Add to Cart Cance	1

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.

Add Service To	Cart	×
Service	······	^
Quantity	<b>•</b>	
Requestor		
Cost Center		
Comment		].
	Add to Cart Ca	ncel

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.

Add Report To	o Cart		×
Report Type		Container Activit 🔻	
Report Profile		Monthly 🔻	
Requestor	Carol		
Cost Center	380A		
Comment			
			Next Cancel

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.

Setup						
Page Setting	5		Sort Fiel	ds		
Margins			Field 1	Account Co	de 🗸 Ascending	
	0.00		Field 2	Set Type	Ascending	
	0.00	×	Field 3			
	0.00				Ascending	
		▼	Field 4		Ascending	
	0.00					
	Letter (8.5	5 in. by 11 in.)	v			
	Portrait		T			
Report Inforn	nation					
Heading	Container	r Activity By Activ	vity Date			
Include R	efiled	Include Des	stroyed 🗌 Su	ummary Only	Account Options	
Include A	dded	Include Deli	ivered 🗌 Pr	rint Contents	Combine Level 2 With Level 1	
	ccessed			rint Descriptions	Combine Level 3 With Level 2	

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.

ailable Fields	Insert Before >>	Field	ds Chosen		
			Sort Order	Ascending	
Activity Date	Insert After >>	1	Account Code	Yes	<b>^</b>
Alternate Code	<< Remove	2	Set Type	Yes	
Item Code					
Item Status					
Requestor					
Status Date					
Workorder #					

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.

Format Columns	×
Columns for this report cannot be m	odified.
	ОК

For all other reports, all available columns are listed.

ailable Fields		Insert Before >>	Field	ls Chosen	
			Sort Order		
Access Count		Insert After >>	1	Code	
Category Description		<< Remove	2	Category Code	
Charge For Storage			3	Object Code	
Containee Object Code		Edit Selected	4	Alternate Code	
Perm Flag			5	From Date	
Security Code			6	To Date	
Set Name			7	Sequence Begin	
Status Date			8	Sequence End	
User Defined Date			9	Item Status	
User Defined Field 1			10	Add Date	
User Defined Field 2			11	Destroy Date	
User Defined Field 3			12	Location Code	
Lloor Dofined Field 4	*				*

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.

Quick Query - ByActivit	yDate ×
Parameters ActivityDate	
	OK Cancel

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 C	Confirmation
Ordered By:	CAROL
Order Date:	Tuesday, March 3, 2020 9:48 AM
Service Priority:	None
<b>Requested Fulfillment Date/Time:</b>	None
Batch Order Number:	393
Items Successfully Ordered:	1
Items Rejected:	0
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         Nature	
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					Delivery Add	Inco		
Detail		Container Activity Rpt			Contact	Erin Cohen		
Quantity		1			Address	1432 Edinger Ave.		
Report Status			he link to access the report.			Tustin, CA 92780		
Report Link		View your report						
Quantity 1	.00			-	Phone	212-323-8574		
Requestor C	arol				Fax	212-323-8566		
Cost Center 3	80A							
Comment								
Return Date								
Notes				Record Center Com	ment			
			2					
Review Comment								
			li.					
								~
								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.

Add Item To Cart	×	¢
Code	000312	4
Service Type	Imaging (Image the item.)	
Requestor		
Cost Center		
Comment		
Return Date		
Image Info		
Reference		
Description		
Index Field 1	Index Field 2	
Index Field 3	Index Field 4	
Index Field 5	Index Field 6	
Index Field 7	Index Field 8	
Index Field Date 1	Index Field Date 2	
Instructions 🕕		
	Add to Cart Cancel	

**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.

Order Detail						×
Order Summary						-
Batch Order Number	324	Ordered by	CAROL	at	5/24/2018 12:31 PM	i .
Tracking Number	778	Placed in Cart by	CAROL	at	5/24/2018 12:30 PM	(
Service Type	Imaging	Reviewed by		at		- 1
Service Priority	STANDARD	Status	Fulfilled	at	5/24/2018 12:42 PM	(
Requested Fulfillment		Workorder Number	11125307			. 1
		Workorder Account	1000			- 1
Order Detail						
Request				Delivery Add	ress	- 1
Detail	Filefolder 856985	6 {2012}		Contact	Jane Hutter	
Quantity	1			Address	1234 Park Ave.	
Image Status	Images are ready	Click the image link to access	images.		New York, NY 11232	
Image Link	Download or view y	our images				
Requestor Jaso	n West			Phone	212-555-3242	
Cost Contor 313				Fav	242 555 2255	

# **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**.

< s	earc	h Inv	entory		(	Cart					ŕ
							<u>30</u> 2	0- 0- 0 0- 0- 0	I ₩ €	2	
			Track	Service Type	Details	Quan	Requestor	Cost Center	Customer		Order
11	×	ø	473	Delivery	Container 134529	1				-	Bulk Items
12	×	E1	478	Delivery	Container 543216	1	Carol				Materials
13	×	ø	484	Delivery	Container 543216	1					
14	×	Ø	496	Delivery	Container 543216	1					Services
15	×	đ	511	Delivery	Filefolder 9654238	1					Reports
16	×	đ	515	Delivery	Container 134509	1					
		0									Ontions

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

Cart Detail		×
Summary		-
Tracking Number	484	
Ordered By	CAROL	
Add Date	8/27/2008 11:08 AM	
Service Type	Delivery	
Details	Container 543216	
Quantity	1	
Requestor		
Cost Center		
Comment		
Return Date		+
	Edit	ncel

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.

									③ 睅 岊 🔅	
			Track #	Service Type	Detail	Quantity	Requestor	Cost Center	Customer Corr	Order
1	×	ø	484	Delivery	Container 543216	1			^	Bulk Items Materials
2	×	ø	496	Delivery	Container 543216	1				Services
3	×	ø	501	Pickup	Container 134500 [XYZ]	1	Carol			Tasks
ŧ	×	ø	505	Pickup	Container 134514 [140]	1	Carol			Add Container
5	×	ø	506	Pickup	Container 134515 [141]	1	Carol			Add Filefolder Add Tape
6	×	ø	507	Pickup	Container 134516 [142]	1	Carol			Order Status
7	×	ø	508	Pickup	Container 134517 [143]	1	Carol			Export Grid Print Grid
3	×	ø	509	Pickup	Container 134518 [144]	1	Carol			Plint Glid
9	×	ø	511	Delivery	Filefolder 9654238	1			~	
0	×	e#	515	Deliverv	Container 134509 [135]	1			>	
)(.	01			100 v item:	s per page			1 - 100	of 142 items 🔿	

#### Click Check Out.

Account 1000	e	3 \		
1000	]8			
Address				
Contact	Jar	ne Hutter	Choose Addre	SS
Address	123	34 Park Ave.	Use Default De	elivery Address
	Ne	w York, NY 11232	)	
Phone	212	2-555-3242	Ĵ	
Fax	212	2-555-3255	)	
Service Priority		3 HOUR		
Requested Fulfil	Iment			
Notes		ſ		

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.

1         1000         Default Mail Address         Jim Smith         4980 Barranca Pkwy         Irvine, CA 92604         Irvine, CA		
3     1000     John's address     John Hutter     1234 Park Ave.     New York, NY 11232       4     1000     Legal Dept. Deliveries     Andrew Puzder     1300 Park Ave.     New York, NY 11232       5     1000/5000     Default Mail Address     Jim Smith     1234 Park Ave.     New York, NY 11232	1000 Default Pick/Del Address Jane Hutter 4980 Barranca Pkwy Irvine, CA 92604	
4     1000     Legal Dept. Deliveries     Andrew Puzder     1300 Park Ave.     New York, NY 11232       5     1000\5000     Default Mail Address     Jim Smith     1234 Park Ave.     New York, NY 11232		
5         1000\5000         Default Mail Address         Jim Smith         1234 Park Ave.         New York, NY 11232	1000 John's address John Hutter 1234 Park Ave. New York, NY 1123	2
	1000 Legal Dept. Deliveries Andrew Puzder 1300 Park Ave. New York, NY 1123	2
6 1000\5000 Default Pick/Del Address Jane Hutter 1234 Park Ave. New York, NY 11232	1000\5000 Default Mail Address Jim Smith 1234 Park Ave. New York, NY 1123	2
	1000\5000 Default Pick/Del Address Jane Hutter 1234 Park Ave. New York, NY 1123	2

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.

Check Out		×
Completed.		~
Requests Ordered:	1	
Requests Not Ordered:	2	$\sim$
		Close

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

pen Ir	n New Tab			
		Order Confir	mation	^
		Ordered By:	CAROL	
		Order Date:	Monday, October 03, 2016 10:31 AM	
		Service Priority:	3 HOUR	
		Requested Fulfillment Date/Time:	None	
		Batch Order Number:	322	=
		Items Successfully Ordered:	1	
		Items Rejected:	2	
		not be added to the order		
Track	k# Service T	ype Details	Qty Reason	
496	Delivery	Container 543216	<ol> <li>Container 543216 Destroyed on Apr 13, 2016 WO# 11125278 Req.</li> </ol>	
505	Pickup	Container 134514 [140]	1 Container 134514 (140) In on Sep 03, 2010.	
Items	successfully a	added to the order		
	# Service T	ype Details	Qty Requestor Cost Center Return Date	
	Pickup	Container 134500 [XYZ]	1 Carol	
Track 501 Work Ja 12 No Ph	korder Accou nie Hutter 234 Park Ave. w York, NY hone: 212-555 ax: 212-555-3	int: 11232 5-3242	1 Carol	
Track 501 Work Ja 12 No Ph Fa	korder Accou nie Hutter 234 Park Ave. w York, NY hone: 212-555 ax: 212-555-3	int: 11232 5-3242	1 Carol	Ŧ

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.

Track#         Service Type         Details           41         X         III         789         Delivery         Container 13450           42         X         III         790         Delivery         Container 13460	
42 X 790 Delivery Container 13460	
	(ALL 2041 4 Meteriale
	1 [AU-201] 1 Materials
43 🗙 📝 791 Delivery Container 134602	2 [AU-202] 1 <u>Services</u>
44 🗙 📝 792 Delivery Container 134603	3 [AU-203] 1 Inventory
45 🗙 📝 793 Delivery Container 13460	
46 🗙 📝 794 Delivery Container 134606	
47 🗙 📝 795 Delivery Container 13460	
48 🗙 📝 796 Delivery Container 134609	9 [AU-209] 1
49 🗙 📝 797 Delivery Container 134611	I [AU-211] 1 Options Export Grid
50 🗙 📝 800 Pickup Container 134500	D [XYZ] 1 Carol 310 Print Grid
51 🗙 📝 801 Pickup Container 13450	1 [XYY] 1 Carol 310 -
	Order Status     Order Approv

Click the Check Out Workorder button.

Address				
Contact	Jane Hutter	Service Priority	3 HOUR	
Address	4980 Barranca Pkwy	Requested Fulfillment	)	<b>:</b> •
	Irvine, CA 92604	First Name		
Phone	212-555-3242	Password		
Fax	212-555-3255			
	Choose Address Use Default Delivery Address			

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

Check Out		×
Completed.		<u>^</u>
Requests Ordered:	2	
Requests Not Ordered:	0	-
		Close

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

	Ordered By:						
		(	CAROL				
	Order Date:	1	Fuesday, Mar	ch 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	)				
	ed to the order	Qty	Requestor	Cost Center	Return Date	Workord	
ccessfully add Service Type Pickup	Details	Qty 1	Requestor Carol	Cost Center 310	Return Date	Workord	
i		Items Successfully Ordered: Items Rejected: ch could not be added to the order	Items Rejected:	Items Rejected: 0	Items Rejected: 0	Items Rejected: 0	

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.

Check Out		×
Completed.		-
Requests Ordered:	5	
Requests Not Ordered:	7	-
		Close

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

		Workorder C	Confirm	atio	n				
	Ordered B	y:	CURTIS						
	Order Dat	e:	1	Fuesd	ay, July 21, 2020 7:49 AM				
	Service Pri	ority:	Standard Service						
	Requested	Fulfillment Date/Time:	None						
	Batch Ord	er Number:	3	399					
	Items Succ	essfully Ordered:	5	5					
	Items Reje	cted:	1	7					
Items wh	ich 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 exe (Inbound Item Limit: 5)	ceeded.			
858	Pickup	Container 134602 [AU-202]		1	The Workorder Item Limits have been exe (Inbound Item Limit: 5)	ceeded.			
859	Pickup	Container 134603 [AU-203]		1	The Workorder Item Limits have been exe (Inbound Item Limit: 5)	ceeded.			
860	Pickup	Container 134604 [AU-204]		1	The Workorder Item Limits have been exercised (Inbound Item Limit: 5)	ceeded.			
864	Pickup	Container 134609 [AU-209]		1	The Workorder Item Limits have been exercised (Inbound Item Limit: 5)	ceeded.			
865	Pickup	Container 134611 [AU-211]		1	The Workorder Item Limits have been exercised (Inbound Item Limit: 5)	ceeded.			
866	Piekup	Container 134612 [A11-212]		1	The Workorder Item Limits have been exe (Inbound Item Limit: 5)	ceeded.			
Items suc	cessfully added	to the order							
Track#	Service Type	Details	Qty	Req	uestor Cost Center Return Date	Workord			
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.

< Search Inventory Cart											
							<u>.</u>	0- 0- 0 0- 0- 0	= \ <u></u> ¥ {	3	
			Track	Service Type	Details	Quan	Requestor	Cost Center	Customer		Order
1	×	ø	390	Delivery	Container 134505	1	Jack			-	Bulk Items
2	×	P	392	Delivery	Container 134518	1	Jack				Materials
3	×	∎ <b>i</b>	393	Delivery	Container 123659	1	Jack				
4	×	∎¶	400	Delivery	Container 134505	1					Services
5	×	=1	404	Delivery	Container 13/4516	1					Departs

## **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.

<b>&lt;</b> s	earch	h Inve	entory			Cart	ΞΩ.		- 14 Q	2	
			Track#	Service Type	Details	Quan	Requestor	Cost Center	Customer		Order
1	х	ø	390	Delivery	Container 134505	1	Jack			*	Bulk Items
2	×	ø	392	Delivery	Container 134518	1	Jack				Materials
3	×	∎ <b>i</b>	393	Delivery	Container 123659	1	Jack				
4	×	∎ł	400	Delivery	Container 134505	1					Services
5	×	∎¶	404	Delivery	Container 134516	1					Reports
6	×	ø	405	Delivery	Container 134516	1					
7	×	ø	406	Delivery	Container 134520	1					Options

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

<b>&lt;</b> S	< Search Inventory ここでは ここでは ここでは ここでは の ここでは の の の に に に に に に の の の の の の の の の の の の の											
			Track#	Service Type	Details	Quan	Requestor	Cost Center	Customer		Order	
1	х	ø	390	Delivery	Container 134505	1	Jack			*	Bulk Items	
2	х	đ	392	Delivery	Container 134518	1	Jack				Materials	
3	×	đ	393	Delivery	Container 123659	1	Jack					
4	×	×.	400	Delivery	Container 134505	1					Services	
5	×	1	404	Delivery	Container 134516	1					Reports	
6	×	đ	405	Delivery	Container 134516	1						
7	×	đ	406	Delivery	Container 134520	1					Options	

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.

< Search Inventory			Order S	tatus					
Search Filter clear filter	<u>rs</u>					<u>.</u>		0	
Batch Order Number Range Tracking Number Range Workorder Number Range Ordered Date Range From date To date Order Status Order Status To date T		Track Service T	Vype Details	Quan	Status	Status Date		*	Options Exact Crist Print Crist Emarges
4	× N	) 100 v ite	ms per page			No	items to display	Q	
https://dev-nightly.us.oneilsoft.com/	/oneilOrder/#								Close

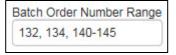
**NOTE**: If the user logged in is a Web User Admin with permission to modify the cart, the **Order Status** grid will also display the Ordered By, Placed In Cart By, and Placed In Cart Date Time columns.

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.

Any Date	
Last 7 days	
Yesterday	
Today	
Tomorrow	
Next 7 days	
Between	

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.

Recor	d Storage U	ser		×
Option:	s Search	Format		
	User Code	Last Name	First Name	
1	CAROL	Morris	Carol	<b>^</b>
2	JOHN	Dunn	John	
3	MARY	Andrews	Mary	
4	JESS	Wagner	Jess	_
5	BWALTON	Brian	Walton	-
	4			•
	1 🗸			Ċ

# **Search Results**

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

earch Filter clear filters							2 B		2	
Batch Order Number Range	*	Batch Order #	Tracking #	Service Type	Details	Quan	Status	Status Date		Options
	1	307	759	Pickup	Container 438318	1.00	Submitted	3/1/2016	-	
Fracking Number Range	2	307	760	Pickup	Container 438316	1.00	Submitted	3/1/2016		
	3	308	761	Pickup	Container 438318	1.00	Submitted	3/1/2016		
Vorkorder Number Range	4	308	762	Pickup	Container 438316	1.00	Submitted	3/1/2016		Images
vorkorder Number Range	5	309	763	Pickup	Container 438318	1.00	Submitted	3/1/2016		
	6	309	764	Pickup	Container 438316	1.00	Submitted	3/1/2016		
Ordered Date Range	7	311	769	Pickup	Container 134830	1.00	Submitted	3/3/2016		
Between v	8	311	770	Pickup	Container 000458	1.00	Submitted	3/3/2016		
From date	9	312	771	Delivery	Container 134830	1.00	Submitted	3/3/2016		
3/1/2016	10	313	772	Delivery	Container 134830	1.00	Submitted	3/3/2016		
To date	11	314	773	Pickup	Container 134830	1.00	Submitted	3/3/2016		
3/4/2016	12	315	774	Pickup	Container 134830	1.00	Submitted	3/3/2016		
Order Status	l									

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.

Order Summary				
3atch Order Number	94			
Fracking Number	307			
Service Type	Pickup			
Service Priority				
Requested Fulfillment Ordered by	CAROL	at	5/5/2006 8:58 AM	
Placed in Cart by		at		
Reviewed by		at		
Status	Workorder	at	5/5/2006 8:58 AM	
Norkorder Number	00000281			
Norkorder Account	2000			
Order Detail				
Request				
Detail	Filefolder TFF00	26		
Quantity	1			
Report Status				
Report Link				
Quantity 1.00				

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**.

			S	ea	rch	Inven	tory <u>clear se</u>	earch	11 Reque	ests in Cart <b>∖≣/ &gt;</b>
	Type text	t here to s	earch	invent	ory			Sea	rch	
Search Filter	lear filters							D = = = =	й. Ф	
Inventory Type	~					Item Code	Alternate C	Add Date Time	Destro	Order
clear		1	Ϋ́	•	<u>~</u>	000458		3/3/2016 7:33 AM		Bulk Items
Container (24)		2	λĥ	•	<u>~</u>	134830		3/30/2001 4:57 PM		Materials
Filefolder (117)		3	λĥ	•	~	134801	P435232	2/8/2000 12:00 AM	9/17/2	Services
Operating Inventory Type		4	λĥ	•	<u>^</u>	134802	P435675	2/8/2000 12:00 AM	9/17/2	Inventory
Specific Inventory Type		5	ú	•	<u>~</u>	134803	P435687	4/21/2000 12:00 AM	5/16/2	Add Container
Specific Inventory Type Manu	Jal	6	Ϋ́	•	<u>~</u>	134804	P435231	2/8/2000 12:00 AM	5/16/2	Add Filefolder
Item Status		7	ý	•	~	134805	P435827	4/21/2000 12:00 AM	5/16/2	Add Tape
Account Code		8	λħ	•	~	134806	P435685	2/8/2000 12:00 AM	5/16/2	Global Edit
		9	λĥ	•	~	134807	P435293	4/21/2000 12:00 AM	5/16/2	Container
Account Code Range						<			>	
Add Date	~		1				00 items	per page		
<u><u>R</u></u>	>							1 - 24 of 24 iten	ns	Options
								Check Out Web Order F	or Approval	Check Out Workorde

The Check Out Web Order For Approval dialog box displays.

Requests in this	s order 1		
4000	400		
Address Contact	Erin Cohen	Service Priority Requested Fulfillment	
Address	3444 Hyslip Ave. Newton, NY 34322		
Phone Fax	212-323-8574 212-323-8566		
	Choose Address Use Default Delivery Addres	55	
Notes			< > .
		Place Web Order For App	roval Cancel

Make any changes and click Place Web Order For Approval.

Check Out		×
Completed.		~
Requests Ordered:	1	
Requests Not Ordered:	0	$\sim$
		Close

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

	w Tab			
		Web Order Submitte	d For Approval	
		Ordered By:	JESS	
		Ordered By: Order Date:	JESS Friday, March 8, 2019 9:43 AM	
		Service Priority:	None	=
		Requested Fulfillment Date/Time:	None	
		Batch Order Number:	339	
		Items Successfully Ordered:	1	
		Items Rejected:	0	
Items v None	vhich could no	ot be added to the order		
	uccessfully ac # Service Ty	lded to the order	Oty Requestor Cost Center Return Date	
786	Delivery	Container 134805 [P435827]	1 Jess	
	,	2		

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

			Or	der Status		20 E E	F 0	1
	Batch	Track	Service Type	Details	Quan	Status	Status	
1	339	786	Delivery	Container 134805 [P435827]	1.00	Awaiting Approval	3/8/20	Ţ
								1

# 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.

≡ I O'Neil Order						Order A	pprovals <mark>1</mark> Ord	ler Rejections 0	vine Record	Center - CAROL -
				0	Sea	arch Inve	entory <u>clear sea</u>	rch	69 F	Requests in Cart <b>\≣</b> ∕
	Тур	pe text h	ere to	searc	h inve	ntory		Search		
Filtered Search	ł								E 1# 0	
Inventory Type -	-					Item Code	Alternate Code	Add Date Time	Destro	Order
clear		1	Ϋ́	۲	<u>~</u> ,	134500	XYZ	4/21/2000 12:00 AM	8/14/2( 🔺	Bulk Items
		2	Ϋ́	-	<u>~~</u>	<u>134501</u>	XYY	4/21/2000 12:00 AM	8/14/20	Materials
Filter counts not available.		3	Ϋ́	•	$\sim$	134502	PPP	4/21/2000 12:00 AM	10/30/2	Materiala
<ul> <li>Container</li> </ul>		4	Ť	•	~	134503	148	4/21/2000 12:00 AM	10/30/2	Services
Filefolder		5	Ϋ́	•	~	134504	TTT	4/21/2000 12:00 AM	8/14/20	Reports
Tape			1			10.000		400400000 40 00 004	011101	

**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.

	Search Inv	ventory	0	rder App	provals			
						2		
	Ordered By	Create Date Time	Customer Comment	Batch Order #	Web Order Status		Options	
1	JESS	3/26/2019 8:59 AM		355	Open	-		
2	JESS	4/2/2019 9:58 AM		358	Open			- 11

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.

Approve Order	>	<
Comment		+
	Approve Cance	el )

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

Approve Web Order		×
Completed.		
Records Approved:	2	
Records Not Approved:	0	
		Close

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

	Tel: Dec	- In the second s					
en In New	Tab Dow	/nload					
		Web Order A	DD	roval			
			r r				
		Ordered By:	J	ESS			
		Order Date:	1	Fuesday, Mar	ch 26, 2019 8:1	19 AM	
		Service Priority:	1	None			
		Requested Fulfillment Date/Time:	1	None			
		Batch Order Number:	3	352			
		Items Approved:	2	-			
		Approved By:	(	CAROL			
Items de							
Items Ap	Service Type	e Details	Otv	Requestor	Cost Center	Return Date	1
809	Delivery	Container 134802 [P435675]	1	Jess	312		
810	Delivery	Container 134803 [P435687]	1	Jess	310		
Workor	rder Account	: 4000\400					
	Cohen						

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**.

Edit Web Ord	ler			×
Account 4000	order 2			*
Address		Service Priority		
Contact	Erin Cohen	Requested Fulfillment		•
Address	3444 Hyslip Ave.			
	Newton, NY 34322			
Phone	212-323-8574			
Fax	212-323-8566			
	Choose Address			
	Use Default Delivery Address	5		
Notes				
			Edit	Cancel

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**.

Order Detail Approvals										
		Batch	Track	Service Type	Details	Quantity	Status	Status Date	Requestor	Options
1	ø	359	819	Delivery	Container 134805 [P435827]	1.00	Awaiting Approval	4/3/2019		
2	Ø.	359	820	Delivery	Container 134806 [P435685]	1.00	Awaiting Approval	4/3/2019		
3	ø	359	821	Delivery	Container 134807 [P435293]	1.00	Awaiting Approval	4/3/2019		

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**.

Approve Ord	er Detail		×
Comment			•
		Approve	Cancel

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

Approve Order Detail		×
Completed.		•
Records Approved:	1	
Records Not Approved:	0	*
		Close

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

en In Nev	w Tab Do	ownload		
				- 8
		Web Order A	pproval	- 8
				- 8
		Ordered By:	JESS	- 8
		Order Date:	Wednesday, April 3, 2019 7:32 AM	- 8
		Service Priority:	None	- 11
		<b>Requested Fulfillment Date/Time:</b>	None	
		Batch Order Number:	359	
		Items Approved:	1	
		Approved By:	CAROL	- 1
				- 1
	pproved			
	Service Ty	•	Qty Requestor Cost Center Return Date	- 1
819	Delivery	Container 134805 [P435827]	1	
Worko	rder Accour	<b>t:</b> 4000\400		
Erin	n Cohen			
	4 Hyslip Ave			- I -
Mar	uton NIV 242	2 <b>2</b>		

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**.

Order Detail		×
Summary		-
Tracking Number	809	
Ordered By	JESS	
Add Date	3/26/2019 8:12 AM	
Service Type	Delivery	
Details	Container 134802 [P435675]	
Quantity	1	
Requestor	Jess	
Cost Center	310	
Comment		
Return Date		-
	Edit	ancel

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.

Reject Order		×
Comment	Please confirm cost center with customer.	
	Reject	Cancel

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

Reject Web Order		×
Completed.		-
Records Rejected:	2	
Records Not Rejected:	0	-
		Close

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**.

Reject Order	Detail	×
Comment	This item was requested by someone else a short time ago. Please confirm item #.]	
	Reject	ncel

Enter a Comment (required), and click Reject.

Reject Order Detail		×
Completed.		-
Records Rejected:	1	
Records Not Rejected:	0	-
		Close

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.

≡ III Order						Order Rejection	s <mark>3</mark>   I	rvine Rec	ord Co	enter - JESS -
< Cart				Orde	er Status					
Search Filter clear filters							<u>.</u>		(j)	
Batch Order Number Range			Batch	Track	Service Type	Details	Quan	Status		Options
	1		358	699	Pickup	Таре	3.00	Rejected	-	
Tracking Number Range	2		350	787	Delivery	Container 134	1.00	Rejected		
Workorder Number Range	3		350	802	Delivery	Container 134	1.00	Rejected		Images
Ordered Date Range									l	
To date									l	
								•	-	
Order Status Rejected										
Rejected v		01		100	<ul> <li>items per</li> </ul>	page			C	

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

Order Summary Batch Order Number Fracking Number Service Type	350 787 Delivery	Ordered by Placed in Cart by	JESS	at		
racking Number	787		JESS	at		
-		Placed in Cart by		al		3/26/2019 8:17 AM
ervice Type	Delivery		JESS	at		3/11/2019 7:09 AM
		Reviewed by	CAROL	at		3/26/2019 11:01 AN
ervice Priority		Status	Rejected	at		3/26/2019 11:01 AN
Requested Fulfillment		Workorder Number				
		Workorder Account	4000\400			
Drder Detail						
Request				Delivery Add	ress	
Detail	Container 134810 [P43	5667-A]		Contact	Erin Cohen	
Quantity	1			Address	3444 Hyslip Ave.	
Report Status					Newton, NY 34322	
Report Link						
Quantity 1.00				Phone	212-323-8574	
Requestor Jess				Fax	212-323-8566	
Cost Center 305						
Comment						
Return Date						
lotes			Record Center Cor	nment		
-						
Review Comment	Please confirm cost cent	ter with customer.				

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.

Move Rejected Webo	order Detail to (	Cart ×
Completed.		^
Records Moved:	1	
Records Not Moved:	0	~
		Close

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.

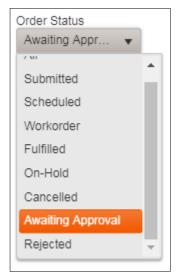
```
Order Approvals 0 Order Rejections 0 Irvine Record Center - CAROL -
```

**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	Ordered by	JESS	at		3/8/2019 9:43 AM
Tracking Number	786	Placed in Cart by	JESS	at		3/8/2019 9:33 AM
Service Type	Delivery	Reviewed by	CAROL	at		3/8/2019 12:52 PM
Service Priority		Status	Submitted	at		3/8/2019 12:52 PM
Requested Fulfillment		Workorder Number				
		Workorder Account	4000\400			
Order Detail						
Request				Delivery Add	dress	
Detail	Container 134805 [P	435827]		Contact	Erin Cohen	
Quantity	1			Address	3444 Hyslip Ave.	
Report Status					Newton, NY 34322	
Report Link						
Quantity 1.00				Phone	212-323-8574	
Requestor Jess				Fax	212-323-8566	
Cost Center						
Comment						
Return Date						
Notes			Record Center Cor	nment		
10103			Trecord Center Cor	inition.		
	Order is approved.					

# Index

# A

Account Access 26 Edit 26 Function Access 27 Global Edit 27 Account code 37 Account code range 37 Add Container 44 Filefolder 45 Tape 47 Add date 37 Add item to cart 69 Add User 17 Advanced Search 42 Alert Layout 19 Alerts Order Approvals 100 Order Rejections 100 Approval Require 90 Approve Order Detail 95 Approve Order 92

#### В

Border 15 Browser compatibility 1 Bulk Items 70

#### С

Cart 69 Add Bulk Items 70 Add items 69 Add Materials 71 Add Services 72 Edit 78 Remove Requests 85 Cart Access 28 Change password 3 Check out 79 Check Out Workorder 82 Clear filters 41 **Clone User Information 19** Column detail font 14 Column Format 7 Column heading font 14 Columns Move 7 Sort 6 Columns searched 32 Comment 71 Container Add 44 Edit 44 Contents 60 Context menu 8 Create Order 79

#### D

Date picker 10 Keyboard shortcuts 11 Date/time picker 12 Description 57 Destroy date 38 Dialog boxes 9

#### Ε

Edit Cart 78 Container 44 Filefolder 46 Tape 48 Errors 12 Export Grids 12

#### F

Filefolder Add 45 Edit 46 Filefolders/tapes in container 50 Filtered Search 32 Find 59 Find and replace 60 Font Column detail 14 Column heading 14 From/to date 41 Function Access 24 Edit 25 Global Edit 26 Load From File 66 Load List 68 Order Approval 99 Save List 68 Save To File 66

#### G

Google Authenticator 2 Grid Export 12 Print 14 Grid picker 9 Grids 4

#### I

Icons 8 Image 51 Delete 57 Purged 56 View 51 Imaging Request 76 Inventory 31 Search 31 Inventory type 34 Item Activity View 50 Item status 36

## K

Keywords 58

#### L

Landscape 14 List Function Access 30 Load 29, 67 Save 28, 66 Load From File 62 Load List 29, 67 Locked out User 19 Log In 1 Logout 4

#### Μ

Margins 13, 14 Materials Add to Cart 71 MFA 2 Resync 2 Model User 19, 23 Move column 7 Multi-factor authentication 2

#### 0

Order Approve 92 Create 79 Edit 94 Reject 97 Order Approval Function Access 99 Order confirmation 81 Order status 86 Output format 14

#### Ρ

Page settings 14 Paper size 14 Password 3 PDF View 55 Perm flag 41 Portrait 14 Print grid 14

### Q

Quick Query Advanced Search 42

#### R

Reject Order 97 Rejected Orders 98 Remove All Rows 85 Remove Current Row 85 Remove From Cart 85 Reports 73 Require Approval 90 Restricted Search 43 Result limit exceeded 41 Resync MFA 2 Retention Information 49

#### S

Save List 28, 66 Save to File 65 Search Advanced 42 Batch Order Number Range 87 Date Range 87

Filtered 32 Ordered by 89 Quick Query 42 Restricted 43 Status 88 Tracking Number Range 87 Workorder Number Range 87 Search field 32 Search filters 33 Account code 37 Account code range 37 Add date 37 Clear 41 Destroy date 38 From/to date 41 Inventory type 34 Item Status 36 Perm flag 41 Sequence range 41 Specific inventory type 35 Specific inventory type manual 35 Status date 40 Search Inventory 31 Search Results 89 Searches Not supported 33 Supported 33 Sequence range 41 Services Add to Cart 72 Shade alternate rows 15 Sort columns 6 Sort Format 7 Specific inventory type 35 Specific Inventory Type Manual 35 Status date 40 Supported searches 33

#### Т

Tape Add 47 Edit 48 TIFF View 55 Time Out 4

#### U

User Account Access 26 Add 17 Delete 23 Edit 20 Function Access 24 User Admin 17 Users Global Edit 21

#### ۷

View TIFF 55 View details 78 View Image 51 Keyboard Shortcuts 54 View Item Activity 50 View PDF 55

#### W

Warnings 12 Web Order Approval 90 Web Order Requires Approval 19 Workorder item limits 84