



ADMINISTRATION

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Navigating O'Neil Stratus

Introduction

O'Neil Stratus takes advantage of the powerful Software-as-a-Service (SaaS), cloud based technologies. It takes the responsibility of hosting an enterprise solution and moves it into an environment that is managed and maintained by the O'Neil team.

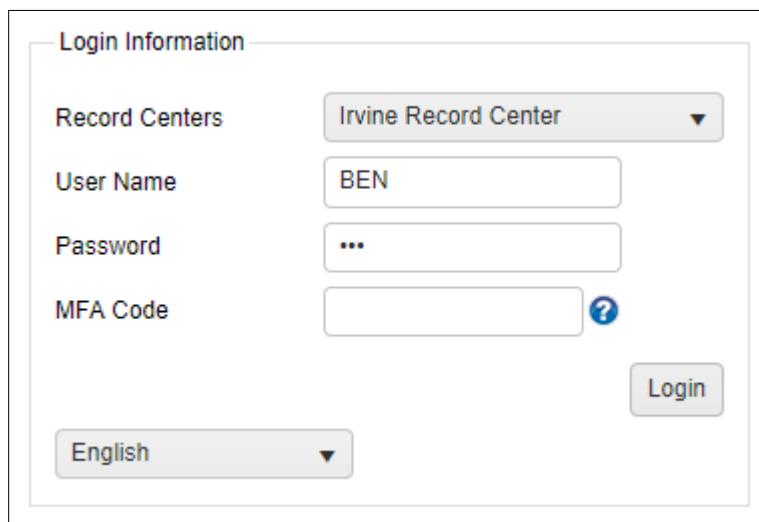
Not only are there “back office” advantages, but there are also interface advantages as O'Neil Stratus is 100% web-based. This means you can access your database and carry out your daily record center business from virtually any device with a compatible internet browser. This mobility allows the freedom to operate from remote facilities or customer sites.

Access O'Neil Stratus

O'Neil Stratus is accessed through your web browser using the URL provided to you by O'Neil. It is supported in Internet Explorer, Firefox, and Chrome. Standard browser functions apply while using O'Neil Stratus.

Login

Once you have accessed O'Neil Stratus, you need to log in.



The screenshot shows a login form titled "Login Information". It includes fields for "Record Centers" (set to "Irvine Record Center"), "User Name" (set to "BEN"), "Password" (represented by three dots "..."), and "MFA Code" (represented by an empty input field with a question mark icon). Below these fields is a "Login" button. At the bottom left is a language selection dropdown set to "English".

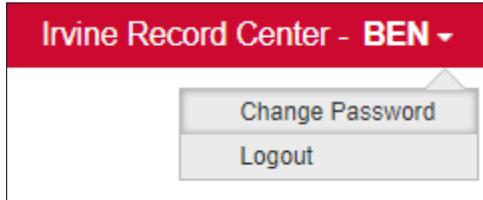
Enter your User name and Password (and MFA code if required) and then click **Login**.

O'Neil Stratus remembers the last Record Center and Language that was chosen during a successful login and restores those values the next time a login is attempted.

If switching between Record Centers and a language with the same name exists in the new Record Center, that language will be used. If not, English will be used

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	BEN
Old Password	<input type="text"/>
New Password	<input type="text"/>
Confirm New Password	<input type="text"/>
MFA Code	<input type="text"/>
<input type="button" value="Change"/> <input type="button" value="Cancel"/>	

Complete the fields and click **Change**.

Logout

When you have finished using O'Neil Stratus, 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**.



Menu/Workspaces

Click or hover over the **O'Neil Stratus** button to display the menu options and Workspaces.



You can have several Workspaces open at a time. Click to switch between them.

Grids

A grid is a work area where you can search the database for information you want, list it, sort it, add to it, delete from it, make global or individual edits, or print it.

Each grid looks basically the same. Data is listed, one item per line, by column.

Record Storage Container							
Options		Search	List	Format	Mark	Clear	
	Code	Item Status	Status Date	Alternate Code	Account Code	Location Code	Add
1	134502	In	4/3/2012	PPP	1000	23400	4/21/2012
2	134507	Out	5/9/2016	152	1000\5000	23401	4/21/2012
3	134508	In	7/13/2016	153	1000\5000	23401	4/21/2012
4	134618	Out	7/15/2020	AU-218	2000	23403	4/21/2012
5	134801	Out	11/21/2019	P435232	4000\400	23404	2/8/2021
6	134802	In	9/17/2010	P435675	4000\400	23404	2/8/2021
7	134803	In	9/17/2010	P435687	4000\400	23404	4/21/2012
8	134804	In	9/17/2010	P435231	4000\400	23404	2/8/2021
9	134805	In	12/13/2010	P435827	4000\400	23405	4/21/2012
10	134806	In	12/13/2010	P435685	4000\400	23405	2/8/2021

At the top of every grid is a menu bar and toolbar icons. Each grid has its own specific submenus under the **Options** menu. Right click on any row in the grid to access the context menu options for that record.



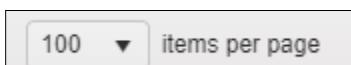
Along the left hand side of each grid are numbered mark/unmark buttons.

1
2
3
4
5
6
7
8
9

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 a Refresh button.



Mark/Unmark Rows

When editing or configuring information on your grid, you may select specific items or all items on the grid to be changed. You can tell if an item is marked by its color on the grid.

Record Storage Container

	Code	Item Status	Status Date	Alternate Code	Account Code	Location Code	Add C
1	134502	In	4/3/2012	PPP	1000	23400	4/21/
2	134507	Out	5/9/2016	152	1000\5000	23401	4/21/
3	134508	In	7/13/2016	153	1000\5000	23401	4/21/
4	134618	Out	7/15/2020	AU-218	2000	23403	4/21/
5	134801	Out	11/21/2019	P435232	4000\400	23404	2/8/20
6	134802	In	9/17/2010	P435675	4000\400	23404	2/8/20
7	134803	In	9/17/2010	P435687	4000\400	23404	4/21/
8	134804	In	9/17/2010	P435231	4000\400	23404	2/8/20
9	134805	In	12/13/2010	P435827	4000\400	23405	4/21/
10	134806	In	12/13/2010	P435685	4000\400	23405	2/8/20

1 2 3 100 items per page

In the above grid, the blue rows are marked. The peach in the number column indicates that row is selected. You can right click on the row to bring up menu options specific to that row only.

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

Mark All

There are times when you will want to affect a change or select for output all the items on your grid. Instead of using the mouse to click on every single item, you can use this option. From the **Mark** menu option, select **Mark All**. All the rows will become marked.

Unmark All

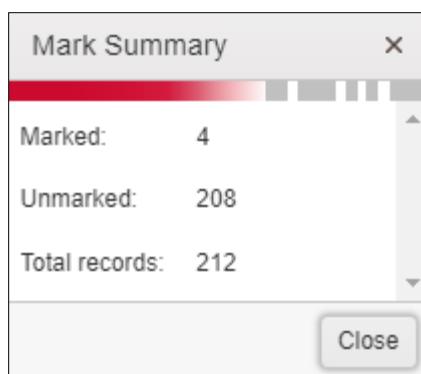
There are also times when you have made a change to all the items, then want to change just a few of them. Instead of using the mouse to unmark every single button, select **Unmark All** to unmark all of the items.

Invert Mark

After conducting a change to a select group of marked items, you may want to then conduct a change to all the other items. In this case you will want to invert the marks, causing all marked items to become unmarked, and all unmarked items to become marked. Select **Invert Mark** and all marks will invert.

Mark Summary

Select the **Mark Summary** option to display the totals for your grid. The number of items marked, items unmarked and the total number of items on the grid is listed.



Clear

When working with a grid, you may find that you have items listed that you don't want. In this case, you can clear them from the grid (this will not delete them from the system). You may clear just marked items, or you can clear the whole grid and start over.

Clear Marked

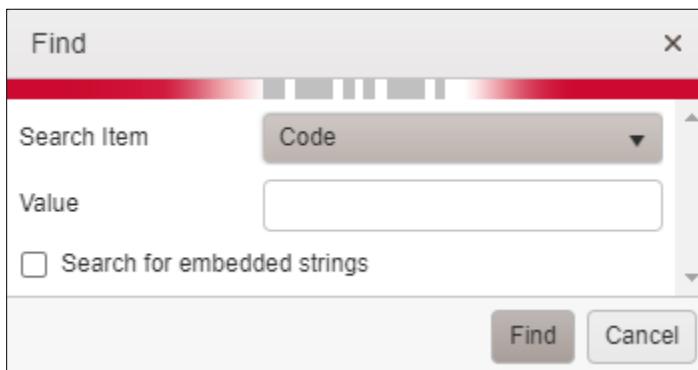
To clear all marked items from the grid, from the **Clear** menu, select **Clear Marked**.

Clear All

If you are finished with a grid, or if you find that you used the wrong criteria in a search, you have the option of clearing the entire grid. This clears all items, marked or unmarked (it does not delete item from the system).

Find

In a grid that has already been loaded with data, you can easily find a specific item. From the **Search** menu, select **Find**. This is a quick way to find a single record when the grid contains a large number of items and you know a value or partial value that the item contains.



Select the down arrow next to the Search Item field to select the field you want to search on. Enter the value and click **Find**.

If you only know a partial value, enter it and select the *Search for embedded strings* check box.

Exit

To exit any grid, from the **Options** menu select **Exit**, or click the X in the top right corner of the grid.

Dialog Boxes

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

Container Add

Description... Contents...	
Code	<input type="text"/> Container
Alternate Code	<input type="text"/>
Description	<input type="text"/>
Location Code	<input type="text"/>
Object Code	CONTAINER 
Containee Type	<input type="text"/>
Security Code	<input type="text"/>
Category Code	<input type="text"/>
Record Series	<input type="text"/>
Set 	
Item Status	In 
Status Date	8/10/2020 11:20 AM  
Add Date	8/10/2020 11:20 AM  
Destroy Date	<input type="text"/> 
Access Count	0 
Perm Flag	No 
<input type="checkbox"/> Charge for Storage	
<input checked="" type="checkbox"/> Charge for Add	
<input type="button" value="Add"/> <input type="button" value="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 Object Codes, click the grid picker.

Object Code	<input type="text"/> 
-------------	--

The **Object** grid appears.

	Object Code	Object Description	Unit Volume
1	1.2 BOX	1.2 Cu Ft Container	1.2000000000
2	ARCHIVE	One Cube	0.0000000000
3	BOX-CT	Box-Check Transfer	0.0000000000
4	BOX-HISECU	Box-High Security	0.0000000000
5	BOX-STD	Box-Standard File	0.0000000000
6	BOX-TP	Box-Tape Storage	0.0000000000
7	CHECK BOX	Check Box	0.0000000000
8	CONTAINER	Container	0.0000000000
9	DRAWING	Drawing Tube	0.0000000000
10	THREE CUBE	Three Cube	2.0000000000

Right click on the Object Code you want and select **OK**. The grid closes and your selection displays in the Object Code 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 letters you typed, a list appears with all matching Object Codes beginning with the letters you entered.

Object Code	BO	<input type="button" value=""/>
Containee Type	BOX-CT	<input type="button" value=""/>
Security Code	BOX-HISECU	<input type="button" value=""/>
Category Code	BOX-STD	<input type="button" value=""/>
Record Series	BOX-TP	<input type="button" value=""/>
Set		

If the search returns more results than the maximum allowed, a message is displayed at the bottom of the list. If no results were found, the empty list will display "No matches found".

NOTE: The default number of results displayed in an autocomplete popup list is 50. A System-Wide RSWIN.INI setting (Options.AutoCompleteMaxResults) allows you to set the maximum number of results to any number between 1 and 100.

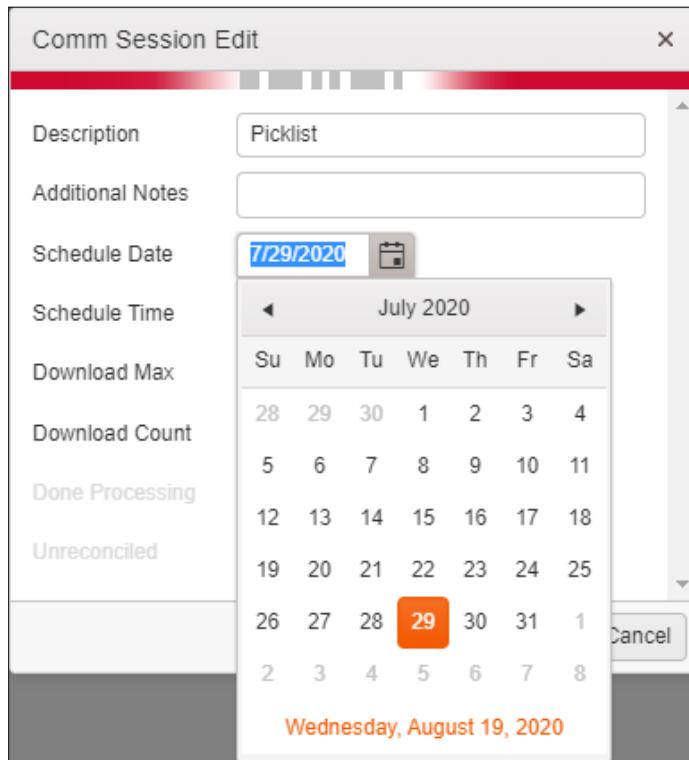
You can select from the list or continue typing.

Date/Time Fields

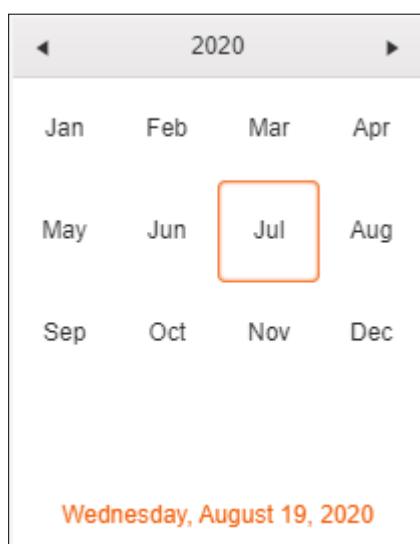
Date and Time fields default to the current date at 12:00 AM. You can enter the date and time, or click the date or time picker.

Date Picker

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



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



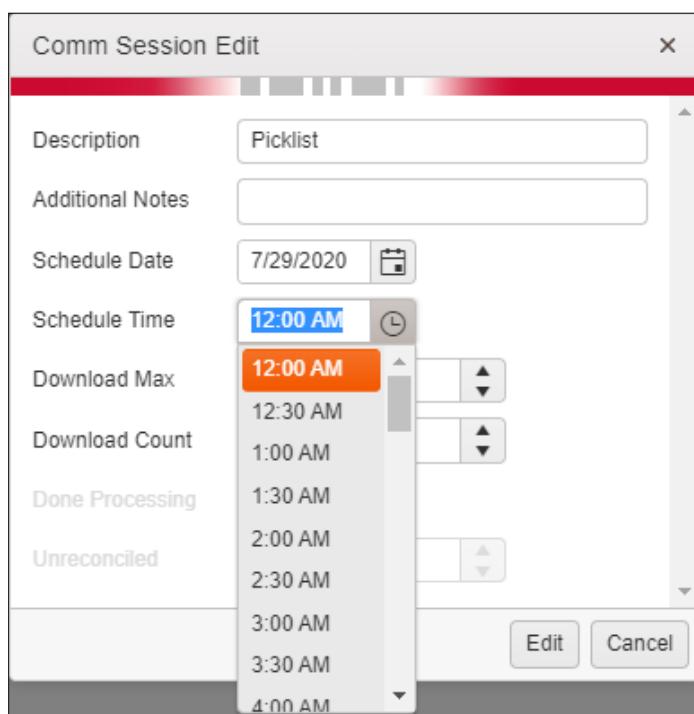
Click the left and right arrows at the top to move to the next or previous year. Click on a month to select it. Once you make your selection, you are instantly returned to the previous screen.

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
Ctrl + 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.

Time Picker

The time picker lists times for you to select from.



Scroll up or down to select the time. You can also use the up and down arrow keys to move through the list.

Date/Time Picker

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

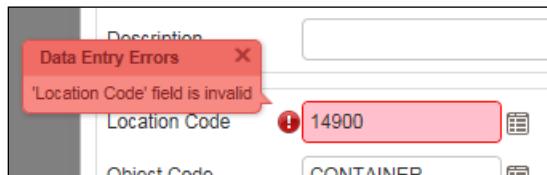
Required by	8/28/2020 10:00 AM		
-------------	--------------------	--	--

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

Errors/Warnings

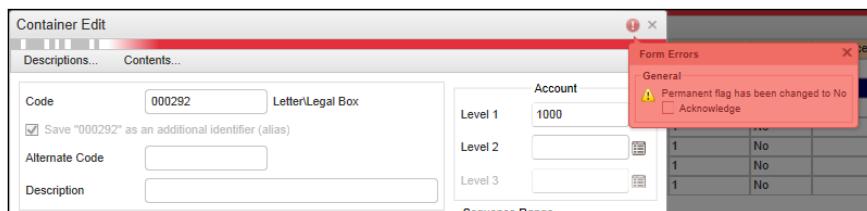
If an invalid entry is made in a field, the field is highlighted in red with an error/warning icon.

Click the icon to view the message.



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

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



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

Keyboard Shortcuts

Main Menu

There is a keyboard shortcut that can be used to access the **Main** O'Neil Stratus menu.

Alt + ` (located just below the **Esc** key on Windows keyboards)

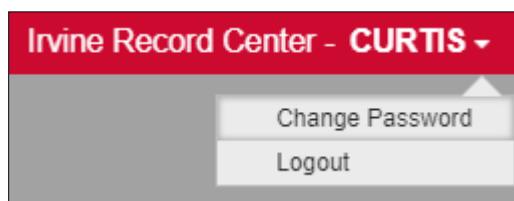


The **Main** menu has the focus and the arrow keys can be used to navigate the menu.

Profile Menu

There is a keyboard shortcut that can be used to access the **Profile** menu.

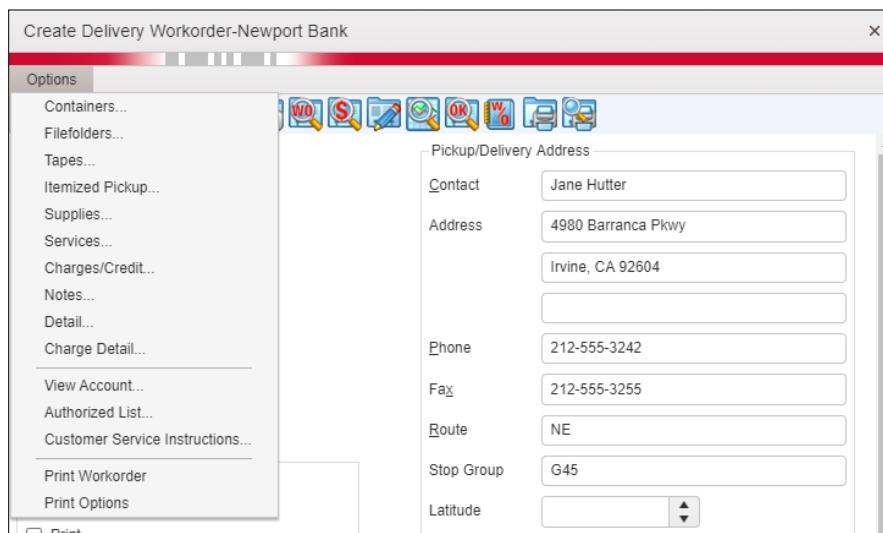
Alt + =



The **Profile** menu has the focus and the arrow keys can be used to navigate the menu.

Options Menu

In any standard grid, picker grid, dialog box, or form that has an **Options** menu, the menu can be opened with the keyboard using **Alt + o**.



The **Options** menu has the focus and the arrow keys can be used to navigate the menu. The **Enter** key can be used to select a menu item.

Context Menu

In addition to right clicking, the context menu can be accessed by pressing the **Menu** key on your keyboard.

The **Menu** key is found on some Windows-oriented keyboards. This key is usually on the bottom-right of the keyboard, next to the **Ctrl** key. It is usually depicted as a cursor hovering over a menu.



After displaying, the context menu has the focus so the arrow keys can be used to navigate the menu items and the **Enter** key can be used to select a menu item. If the context menu is open, pressing the **Menu** key will close it.

Grid Picker/Down Arrow Fields

In dialog boxes, grid picker and down arrow fields can be opened using the keyboard.

Language	English	
User Type	Standard	

Tab until the grid picker or down arrow control has the focus and then press **Alt + down arrow** to open the window.

Grid Picker Grids

In grid picker grids, type a character to search for all items in the first column that start with that character and display only those matches.

Press **Ctrl + %** to query all records.

Press the **Backspace** or **Delete** key to clear the grid.

Mark/Unmark Rows

Multiple Rows

In any grid, the keyboard can be used to mark or unmark multiple rows at once. Click on the first column of a row to either mark or unmark it. This is the beginning row. Hold down the **Shift** key and click on the last row you want included. All rows between those two are changed to the state of the first row. This works in both ascending and descending direction, as well as on a row on the next or previous page.

NOTE: This shortcut only works with a mouse and keyboard or with a touchscreen and keyboard. It does not work using just a touchscreen.

Single Row

The **Space Bar** toggles between marked and unmarked for a single row.

Navigate Between Grid Rows

In any standard grid or picker grid, when the grid has focus, you can use the **up arrow** or **down arrow** to move the selected row.

Workorder Create/Edit Dialog

Standard keyboard shortcuts can be used to move between fields in the **Workorder Create/Edit** dialogs. Use your browser's shortcut key along with the underlined letter to navigate to that field. The shortcut key varies based on the browser used.

- Chrome uses **Alt** for almost all shortcuts; however, **d**, **e**, and **f** require **Alt+Shift**. **Alt+Shift** works for all keys except **i**.
- Edge uses **Alt** for all shortcuts; however, **Alt-Shift** is required for **d**.
- Internet Explorer uses **Alt** for all shortcuts. **d** cannot be used.
- Firefox uses **Alt+Shift** for all shortcuts.
- Safari uses **Ctrl+Alt** for all shortcuts.

Help Menu

From the **Help** menu option, you can access the O'Neil Stratus help file, O'Neil Software website, and the **About** dialog box.

O'Neil Stratus Help File

When you are logged in to O'Neil Stratus, the Help webpage can be accessed from the **Help** menu under **Contents**. It is only available to authenticated users.

The Help webpage should be displayed in a separate browser tab.

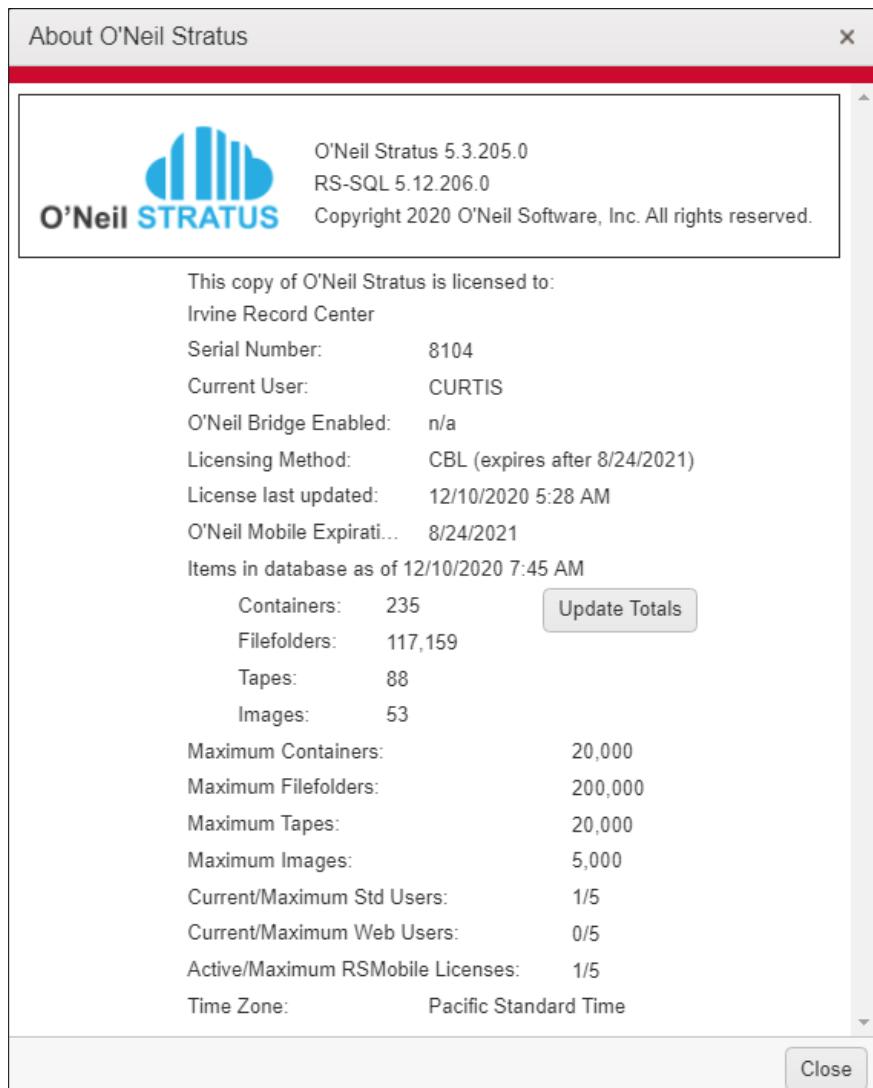
If you are not logged in to O'Neil Stratus and attempt to browse directly to the O'Neil Stratus Help webpage (using a URL), you are immediately redirected to the O'Neil Stratus Logon page.

If you log out of O'Neil Stratus while the Help webpage is still open in another browser tab, you may see the text "Topic not found" displayed in the content panel.

If you press **F5** (or **Ctrl+F5**) on the Help webpage when you are not logged in to O'Neil Stratus you are automatically redirected to the O'Neil Stratus Logon page.

About

The **About O'Neil Stratus** dialog box can be accessed from the **Help** menu under **About**. It displays system information.



Dashboard

O'Neil Stratus Dashboard

The O'Neil Stratus Dashboard is a powerful user interface where records center management and staff can see live, critical information at-a-glance. This feature is customizable by role, whether customer service or management. Information, formerly available through searches and reports, can be automatically pushed to the viewer and updated on a regular interval.

The Dashboard provides quick statistics and an up-to-date visual display of data, which help you determine business conditions and monitor enterprise performance. Infographics and charts display information such as Inventory and Activity Trends, Items Per Account and Warehouse Productivity. Reports contain data in a tabular format and typically display numbers and text only, indicating Late Delivery/Pickups, the status of Workorders and Item Process Control. Real-Time Alerts, the number of Open Spaces in a Warehouse, Workorders Not Routed, Items Eligible for Destruction, as well as data on Favorite Searches and Inventory Management are also shown. Information is shown in an easy-to-read, compact format and all visualizations are presented together in a single, consolidated view. The data displayed can be customized and provides the ability to drill down if you are looking for more detailed information.

The screenshot displays the O'Neil Stratus Dashboard with several key sections:

- Operations Manager:** Includes a chart titled "Inventory and Activity Trends" showing activity levels for Containers, Filefolders, Tapes, and Images. A table titled "Late Delivery / Pickup" lists delivery lateness and details for workorders 1 through 7.
- Favorite Searches:** A list of search categories including Item Search, Container Search, Filefolder Search, Tape Search, and more.
- Containers Per Account:** A bar chart showing container counts for accounts 2000, 1001, 1000, 3000, 4000, ABC CORP, CITYHOSP, TUAN3, and 9000.
- Workorders:** A table listing workorders with columns for Workorder #, Account Code, Create Date, Priority Act., and Required By Date.
- Item Process Control:** A table listing workorders with columns for Workorder #, Item Code, Location Code, Task Assigned Date Ti.
- Warehouse Productivity:** A chart showing productivity levels for users ADMIN, CURTIS, CM, ISAAC, SEDAT, LYDIA, JOE, and BEN across Add, Pull, Refile, Move, and Inventory operations.
- Inventory Management:** A section with "Add" and "Search" buttons for Container, Filefolder, and Tape categories.

The screenshot shows the O'Neil Stratus dashboard interface. At the top, there are three tabs: 'Notifications - 0', 'Web Orders 331', and 'Irvine Record Center - JOE -'. Below these tabs, the main content area is titled 'Customer Service Representative'. It contains several data tables and charts:

- Web Order Detail:** A table showing 8 rows of web order information. Columns include Batch Number, Tracking Number, Status, Status Date Time, WO Type..., Ordered B..., Requested Fulfill..., and Create Date Time.
- Workorders:** A table showing 2 rows of workorder details. Columns include Workorder #, Account Code, Create Date, Priority Act..., and Required By Date.
- Accounts:** A table showing 6 rows of account information. Columns include Level1 Acco..., Level2 Acco..., Level3 Acco..., Account Description, Contract Expire Date, and Setup Date.
- Workorders Not Routed:** A donut chart showing 54 items.
- Open Workorders:** A donut chart showing 533 items.
- Favorite Searches:** A list of links including Item Search, Container Search, Filefolder Search, Tape Search, Account Lookup, Web Orders Not Fulfilled, Today's Workorders, Inventory by Account, Accounts Expiring, and Invoices by Billing Period.
- Inventory Management:** A section with 'Add' and 'Search' buttons for Container, Filefolder, and Tape.

NOTE: A security filter is applied to Dashboard indicators, charts, and alerts when generating data so that users only see data they are authorized to see.

Assign Dashboard Layout/Alert Layout

The Dashboard Layout and Alert Layout are assigned in the **User Add/Edit** dialog box.

The screenshot shows the 'User EDIT' dialog box with various user settings. The 'Dashboard Layout' and 'Alert Layout' fields are highlighted with a red box. The 'Dashboard Layout' is set to 'Operations Manager' and the 'Alert Layout' is also set to 'Operations Manager'. Other visible fields include User Code (CURTIS), Language (English), RSMobile Password (curtis), User Type (Standard), User Status (Active), Account Access (All by default), Item Security Code (99), RSWeb.NET Material List, Terms Accepted Date (2/26/2019), O'Neil Mobile Accepted Date (2/11/2016), and Contact PIN/Confirm Contact PIN fields.

Dashboard Layout: This field determines the layout of the dashboard the user will see. Select either Operations Manager or Customer Service Representative depending on the user. If you do not want to display the dashboard, leave the field blank.

Alert Layout: Alerts display at the top right corner of the dashboard. There are three alert layouts available. The Operations Manager alert displays the number of Incoming Items and the number of Exceptions. The Customer Service Representative alert displays the number of Web Orders received. The Notifications alert notifies you when invoices you created/reprinted have been completed by the scheduling service. If you do not want to display alerts, leave the field blank.

NOTE: When the Operations Manager or Customer Service Representative alert is turned on, the Notification alert is automatically turned on also.

Alerts

Alerts provide a quick view of the current total of incoming items and exceptions, web orders, or invoicing notifications. They are only displayed if they have been enabled in the **User Add/Edit** dialog box.

Customer Service Representative

This alert displays the number of Web Orders received.



The number is yellow when the dashboard is first opened, or if the number has changed. You can click on the number to acknowledge it and turn off the yellow.

Click the Reload icon to refresh the data at any time.

Click on **Web Orders** or the Workspace icon to go directly to the **Web Order Detail** grid. All web orders are displayed on the grid.

Settings

The Settings icon allows you to set parameters for the query used by the alert.



You can select the From and To days. Click **Setup** to save your changes. The parameters remain in effect until you change them.

Operations Manager

This alert displays the number of Incoming Items and the number of Exceptions.



The number is yellow when the dashboard is first opened, or if the number has changed. You can click on the number to acknowledge it and turn off the yellow.

Click the Reload icon to refresh the data at any time.

Click on **Incoming Items** or the Workspace icon to go directly to the **Item** grid. All incoming items are displayed on the grid.

Click on **Exceptions** or the Workspace icon to go directly to the **Mobile Comm Session** grid. All sessions are displayed on the grid. You can then view the Exception Detail for each session.

Settings

The Settings icon allows you to set parameters for the query used by the alert.



You can select the From and To days. Click **Setup** to save your changes. The parameters remain in effect until you change them.

Notifications

This alert notifies you when invoices you created/reprinted have been completed by the scheduling service.

A count indicates the number of notifications. When the count increases, the color changes to yellow. You can click on the number to acknowledge it and turn off the yellow.



A spinning circle indicates that invoices are not yet completed.



Click the down arrow to display the **Notifications** grid.

Notifications					
<input type="button" value="Options"/> <input type="button" value="Search"/> <input type="button" value="Format"/> <input type="button" value="Mark"/> <input type="button" value="Clear"/>					
	Actions	Status Date Time	Type	Message	Summary
1	<input type="checkbox"/> <input type="button" value="File"/> <input type="button" value="Download"/> <input type="button" value="Print"/> <input type="button" value="List"/>	7/29/2020 1:16 PM	Invoice	i Invoice run completed. Tracking #20.	Invoice Create. Tracking #20.

Each message associated with the process for invoice creation/reprint includes Summary text. New notification messages replace the previous message. Only the most current message is displayed.

NOTE: The Notifications alert and **Notifications** grid limit the number of notifications processed to 100. As notifications in the **Notifications** grid are acknowledged or dismissed older notifications will begin to appear (if there are older notifications.)

Icons allow you to perform different actions for each message.

Acknowledge

	Actions	Status Date Time	Type	Message
1	<input checked="" type="checkbox"/> <input type="button" value="File"/> <input type="button" value="Download"/> <input type="button" value="Print"/> <input type="button" value="List"/>	8/1/2018 7:44 AM	Invoice	i Invo...
2	<input checked="" type="checkbox"/> <input type="button" value="File"/> <input type="button" value="Download"/> <input type="button" value="Print"/> <input type="button" value="List"/>	8/1/2018 7:44 AM	Invoice	i Invo...

Click this icon to acknowledge it and remove it from the grid.

View Attachment

	Actions	Status Date Time	Type	Message
1	<input checked="" type="checkbox"/> <input type="button" value="File"/> <input type="button" value="Download"/> <input type="button" value="Print"/> <input type="button" value="List"/>	8/1/2018 7:44 AM	Invoice	i Invo...
2	<input checked="" type="checkbox"/> <input type="button" value="File"/> <input type="button" value="Download"/> <input type="button" value="Print"/> <input type="button" value="List"/>	8/1/2018 7:41 AM	Invoice	i Invo...

This icon displays the invoice in File Viewer. You have the option of downloading the invoice from File Viewer.

Download Attachment

	Actions	Status Date Time	Type	Message
1	<input checked="" type="checkbox"/> <input type="button" value="File"/> <input type="button" value="Download"/> <input type="button" value="Print"/> <input type="button" value="List"/>	8/1/2018 7:44 AM	Invoice	i Invoice run completed. Transaction ID: 1160
2	<input checked="" type="checkbox"/> <input type="button" value="File"/> <input type="button" value="Download"/> <input type="button" value="Print"/> <input type="button" value="List"/>	8/1/2018 7:41 AM	Invoice	i Invoice run completed. Transaction ID: 1161

This icon downloads the file. When you click on it, you are given the option of downloading as a PDF or ZIP file.

Combined PDF of invoices 1160 through 1165

ZIP of invoices and summaries for 1160 through 1165

Display Grid

	Actions	Status Date Time	Type	Message
1	<input checked="" type="checkbox"/> <input type="button" value="File"/> <input type="button" value="Download"/> <input type="button" value="Print"/> <input type="button" value="List"/>	8/1/2018 7:44 AM	Invoice	i Invoice run completed. Transaction ID: 1160
2	<input checked="" type="checkbox"/> <input type="button" value="File"/> <input type="button" value="Download"/> <input type="button" value="Print"/> <input type="button" value="List"/>	8/1/2018 7:41 AM	Invoice	i Invoice run completed. Transaction ID: 1161

This icon displays a list of all invoices that were created in the invoice run.

Record Storage Invoice							
Options		Search		List		Format	
Invoice Number	Account Code	Print Date	Print Time	Begin Date	End Date	Total	
1	1160	9042	8/1/2018	7:44 AM	7/1/2018	7/31/2018	0.00
2	1161	9043	8/1/2018	7:44 AM	7/1/2018	7/31/2018	0.00
3	1162	9045	8/1/2018	7:44 AM	7/1/2018	7/31/2018	0.00
4	1163	3000\3007	8/1/2018	7:44 AM	7/1/2018	7/31/2018	0.00
5	1164	3000\3008	8/1/2018	7:44 AM	7/1/2018	7/31/2018	0.00
6	1165	3000\3011	8/1/2018	7:44 AM	7/1/2018	7/31/2018	0.00

Display Activity

	Actions	Status Date Time	Type	Message
1	<input checked="" type="checkbox"/> <input type="button" value="File"/> <input type="button" value="Download"/> <input type="button" value="Print"/> <input type="button" value="List"/>	8/1/2018 7:44 AM	Invoice	i Invoice run completed. Transaction ID: 1160
2	<input checked="" type="checkbox"/> <input type="button" value="File"/> <input type="button" value="Download"/> <input type="button" value="Print"/> <input type="button" value="List"/>	8/1/2018 7:41 AM	Invoice	i Invoice run completed. Transaction ID: 1161

This icon displays a list of any errors, warnings, or informational messages related to the invoice.

Message	
 Invoice 1160 created for account 9042.	
 Invoice 1161 created for account 9043.	
 Invoice 1162 created for account 9045.	
 Invoice 1163 created for account 3000\3007.	
 Invoice 1164 created for account 3000\3008.	
 Invoice 1165 created for account 3000\3011.	
 Combined PDF created for invoices 1160 through 1165	

Notification Message Examples

When invoices are created or reprinted, the following notifications can be generated.

Message Example	Type	Notes
Invoicing starting.	Info	Indicates that the invoice creation batch has been submitted. Invoice scheduling service hasn't started the invoice creation yet.
Invoice 58 for account ABC was not printed as the invoice total was zero.	Warning	Indicates that the invoice was not printed because the RSWIN.INI option "Invoice.PrintWhenInvoiceZero" was set to "No" and the invoice total was zero. Does not apply to invoice reprint.
Invoice 58 for account ABC was not saved as the invoice total was zero.	Warning	Indicates that the invoice was not saved because the RSWIN.INI option "Invoice.SaveWhenInvoiceZero" was set to "No" and the invoice total was zero. Does not apply to invoice reprint.
Invoice 1234567 created for account ABC.	Info	Invoice has been created for the specified account. If "Save Invoice" was checked, invoice was saved.
Invoice 3135 PDF created for account ABC.	Info	Invoice PDF was created. If "Save Invoice" was checked, PDF was saved.
Summary PDF created for account ABC.	Info	Summary has been created for the specified account. If "Save Invoice" was checked, summary was saved.
Summary for account 0100 emailed successfully.	Info	Account summary emailed successfully
Invoice 3135 email succeeded for account ABC.	Info	Invoice PDF emailed successfully.
Invoice 3136 email attempt failed: No recipients set up for account ABC.	Error	Attempted to send invoice PDF via email, but recipients have not been set up for account.
Invoice Run Summary PDF created.	Info	Invoice summary PDF created successfully. If "Save Invoice" was checked, PDF was saved.

Combined PDF created for invoices 3125 through 3138.	Info	Combined PDF of all invoices and summaries created and saved successfully. Will be available to download as an attachment to the notification.
Invoice numbers skipped as they already exist: 3125-3138.	Warning	One or more invoice numbers were skipped because they already exist. There can be multiple entries if multiple invoice ranges are skipped.
Invoice Creation scheduled to run at 8/30/2017 10:00 PM.	Info	This notification will not display until the schedule date/time has passed. If the batch hasn't started yet, this message will display and may indicate that the invoice scheduling service isn't running. Date is displayed using regional settings based on the browser language.
Invoice run completed.	Info	Invoice run has completed without any errors or warnings. You can view/download a PDF that combines all the invoices and summaries printed during the invoice creation.
Invoice run completed with errors.	Warning	Invoice run has completed with errors. Warnings may have also occurred.
Invoice run completed with warnings.	Warning	Invoice run has completed with warnings only. No errors have occurred.
Invoice run failed.	Error	Invoice run has failed.
Process timed out.	Warning	The notification hasn't updated in a certain amount of time (by default this is 3 hours for invoicing). This does not necessarily mean that the invoice batch won't finish, just that the system has given up on further updates. If the invoice does eventually finish, it would no longer be considered "timed out".

Notification Options

When a notification is displayed, you can perform the following actions.

Notification Status	Possible Actions	Notes
Starting, Scheduled, In Progress	Acknowledge, Dismiss	Process is starting, scheduled or In Progress.
Failed, Abandoned	Acknowledge	Process has failed to complete or has timed out and has been abandoned.
Completed	Acknowledge, View PDF, Download PDF, Display Grid	Process has completed

Actions

Action	Notes
Acknowledge	This message will no longer show; future notifications for the process will show.

Dismiss	You no longer wish to see any future notifications for this process.
View PDF	View PDF in File Viewer.
Download PDF	Download PDF.
Display Grid	Display invoices created in Invoice Reprint grid if invoices were saved. Option not available if invoices were not saved.

Indicators

A query has been assigned to each indicator and the numbers are updated each time you open the dashboard.

The indicators measure three quantities:

- The large fonted number in the middle of the ring is the “primary count”.
- The smaller fonted number is the “total count”.
- The green color in the ring represents the primary count while the white color represents the “other count”.



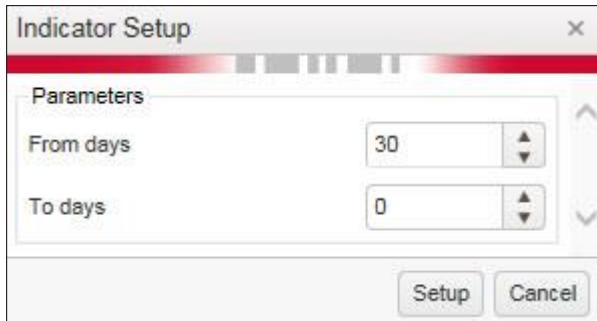
Hover over the ring (either green or white area) to view a tool tip with the percentages associated with the count.



Click the Reload icon to update the numbers.

Settings

The Settings icon allows you to set parameters for the query used by the indicator.



You can select the From and To days. Click **Setup** to save your changes. The parameters remain in effect until you change them.

Favorite Searches

Several queries have been added to the Favorite Searches list. Click a link to go directly to that area.

A screenshot of a 'Favorite Searches' list box. It has a title bar 'Favorite Searches'. The list contains the following items:

- [Item Search](#)
- [Container Search](#)
- [Filefolder Search](#)
- [Tape Search](#)
- [Items to be Pulled](#)
- [Today's Mobile Comm Sessions](#)
- [Web Orders Submitted](#)
- [Account Lookup](#)
- [Today's Workorders](#)
- [Mobile Assignments by User](#)
- [Route Ops Exceptions](#)
- [Acknowledged Exceptions](#)
- [Locations Exceeding Capacity](#)
- [Urgent Notification Scans](#)

NOTE: At this time additional favorites cannot be added to the list.

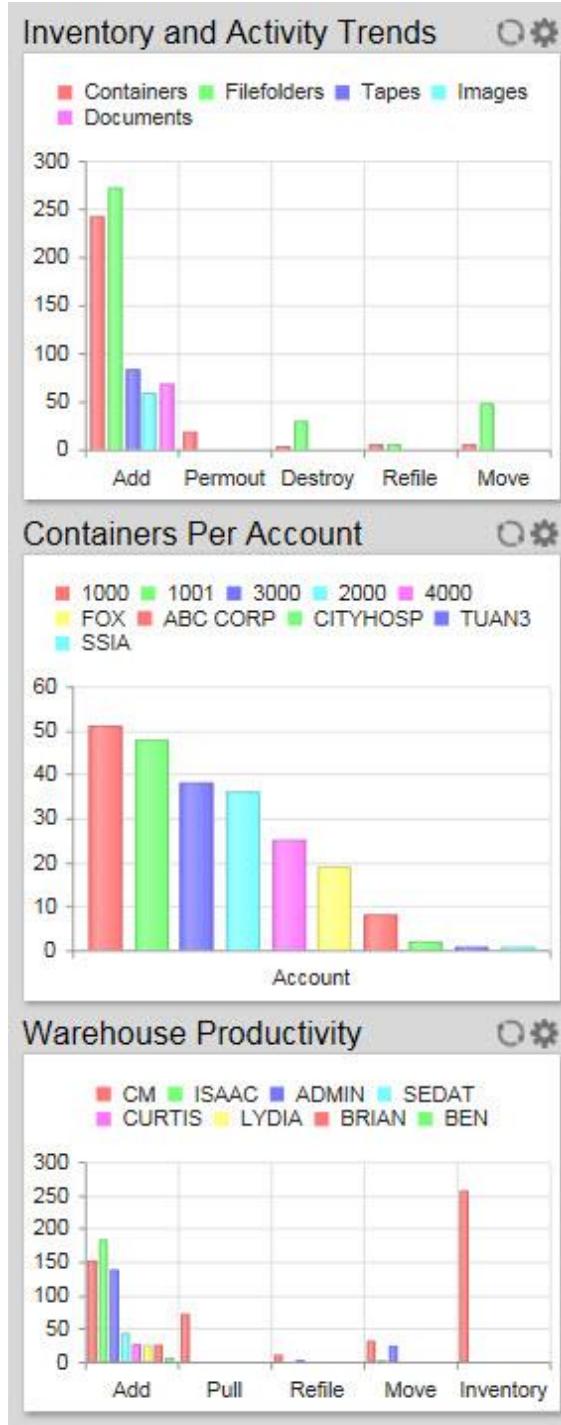
Inventory Management

This section contains links to take you directly to the **Add** or **Query** dialog for items.



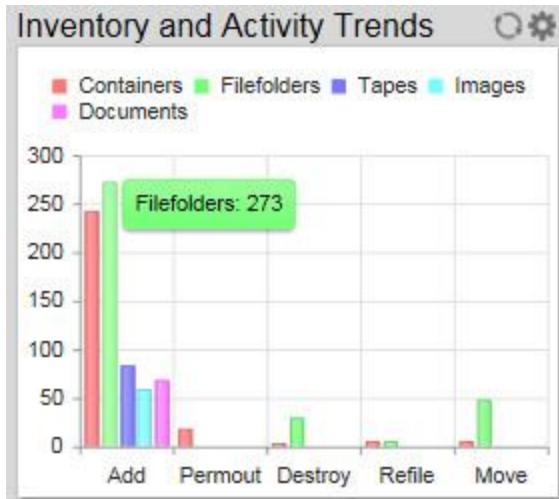
Charts

The charts provide information on Inventory and Activity Trends, Containers Per Account, and Warehouse Productivity.



Inventory and Activity Trends

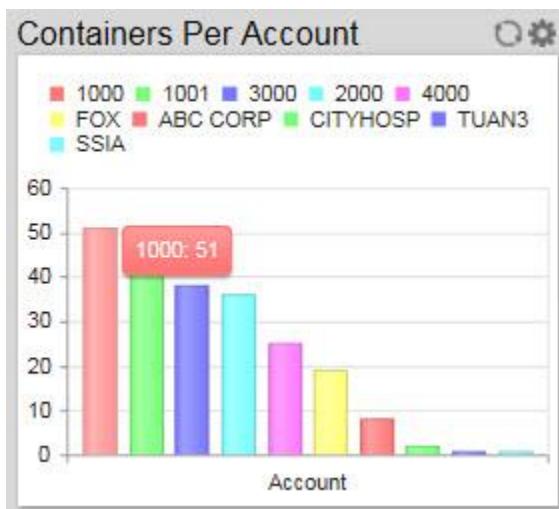
This chart displays inventory and activity for each item type. Click on an item type to add or remove it from the chart. If the legend shows in color, then the item will be included on the chart. Hover over any bar to view the exact count.



Click the Reload icon to update the data at any time.

Items Per Account

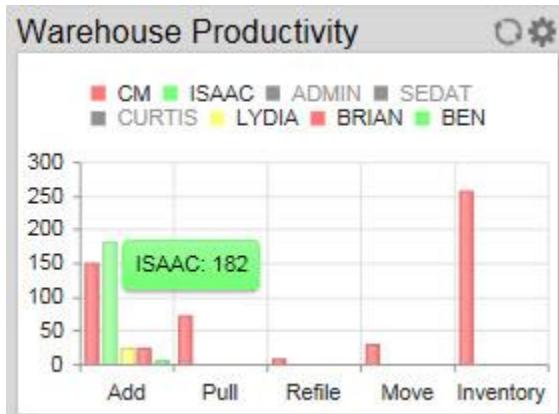
This chart displays the 10 Accounts with the most containers. Click on an Account to add or remove it from the chart. If the legend shows in color, then the Account will be included on the chart. Hover over any bar to view the account name and exact count of containers.



Click the Reload icon to update the data at any time.

Warehouse Productivity

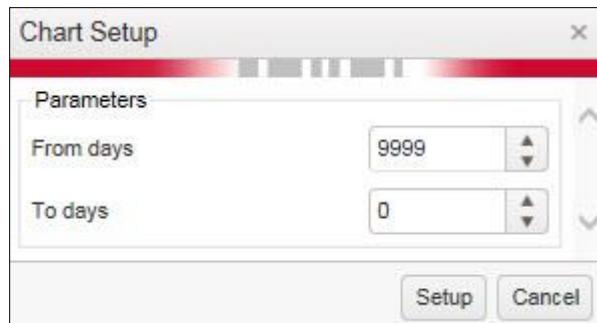
This chart displays the 10 Standard Users with the most actions. Click on a User to add or remove them from the chart. If the legend shows in color, then the User will be included on the chart. Hover over any bar to view the user name and exact count for that action.



Click the Reload icon to update the data at any time.

Settings

The Settings icon allows you to set parameters for the query used by the chart.



You can select the From and To days. Click **Setup** to save your changes. The parameters remain in effect until you change them.

Grids

The grids let you quickly view information from the dashboard without having to go to the actual grid.

Late Delivery / Pickup

Lateness	Workorder #	Account Code	Delivery Date Time	Required
0 hr 16 min	00000036	1000	8/4/2004 10:16 AM	8/4/2004
0 hr 42 min	00000038	3000	8/4/2004 10:42 AM	8/4/2004
0 hr 29 min	00000039	4000	8/4/2004 10:29 AM	8/4/2004
0 hr 59 min	00000148	ACME	3/20/2015 7:59 AM	3/20/201
13 hr 51 min	00000202	1000	11/10/2015 6:51 AM	11/9/201

100 items per page 1 - 5 of 5 items

Workorders

Workorder #	Account Code	Create Date	Priority Act...	Required By Date
00000297	1000	10/29/2015	STANDARD	10/30/2015
00000298	ACME	11/3/2015	RUSH	11/3/2015
00000299	ACME	11/3/2015	STANDARD	11/3/2015
00000300	4000	11/3/2015		
00000301	4000	11/3/2015		
00000302	DAN	11/3/2015	STANDARD	11/4/2015

100 items per page 1 - 38 of 38 items

Item Process Control

Workorder #	Item Code	Location Code	Activity Date	Activity Time	St
00000048	134501	23550	6/23/2014	11:50 AM	6/23/2014 11:50 AM
00000157	134501	23550	7/15/2015	3:50 PM	7/15/2015 3:50 PM
00000048	134504	23550	6/23/2014	11:50 AM	6/23/2014 11:50 AM
00000291	134504	23550	8/11/2015	10:25 AM	8/11/2015 10:25 AM
00000325	USC001	55555	11/5/2015	9:35 AM	11/5/2015 9:35 AM

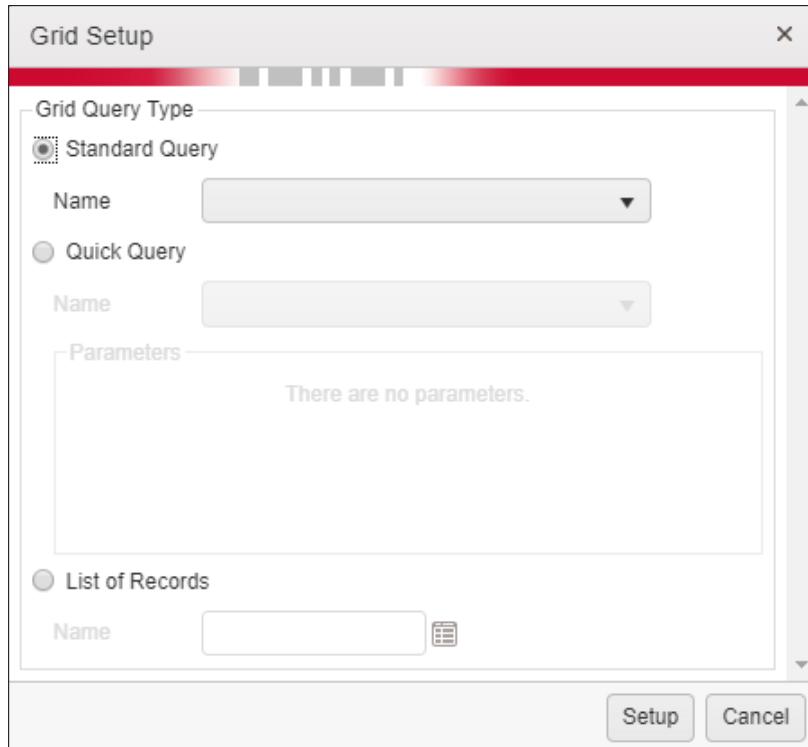
100 items per page 1 - 11 of 11 items

Settings

To access the **Settings** menu, click the Settings icon for each grid.

Setup

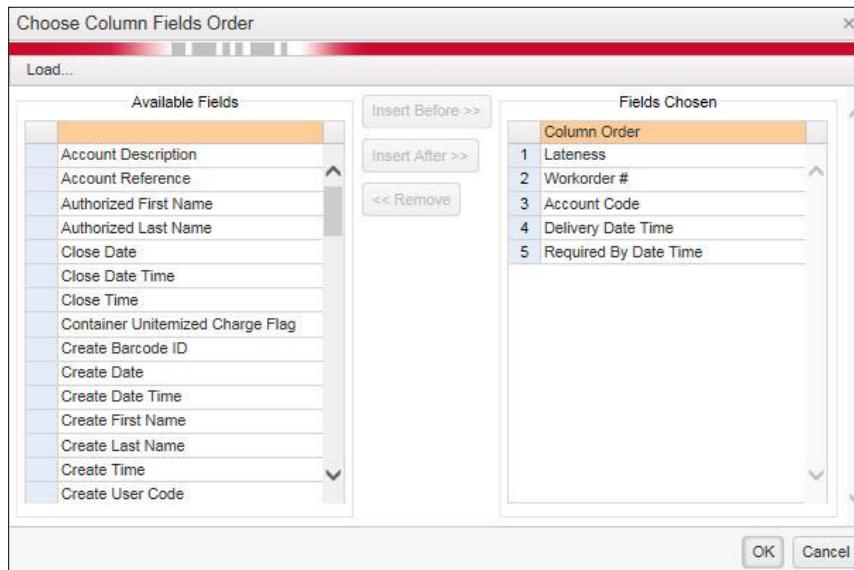
Click **Setup** to access the **Grid Setup** dialog box. You can select a standard query, quick query or list to define the data you want to appear in the grid on the dashboard.



Any queries or lists that have been set up are available here, as well as some “zoc” queries that are built in.

Format Columns

This menu option lets you choose the fields you want to display in the grid as well as the order in which they are displayed.



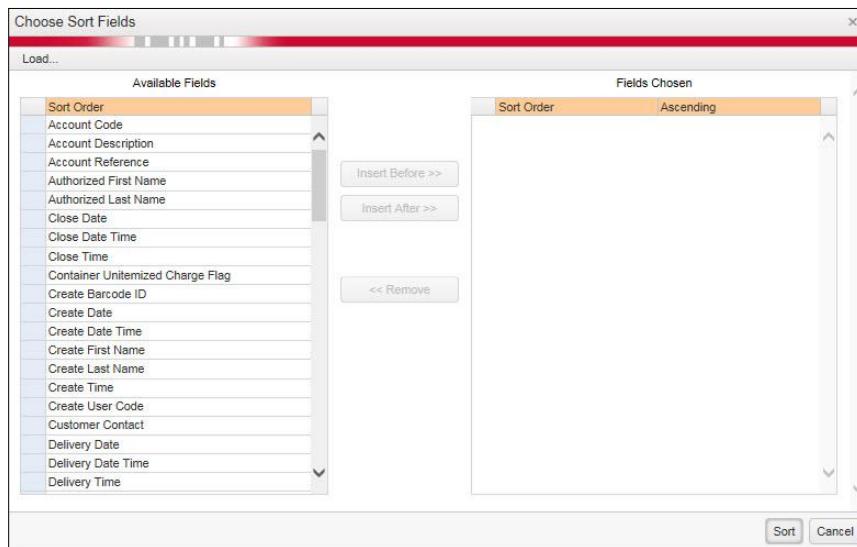
To add a column, select it from the Available Fields. Select where you want to insert it in the Fields Chosen and then click **Insert Before** or **Insert After**.

To remove a column, select it from the Fields Chosen and click **Remove**.

Click **OK** to save your changes.

Format Sort

This menu option lets you choose the fields you want to sort by and whether to sort in ascending or descending order.



To add a sort field, select it from the Available Fields. Select where you want to insert it in the Fields Chosen and then click **Insert Before** or **Insert After**. Click in the Ascending column to select **Yes** or **No**.

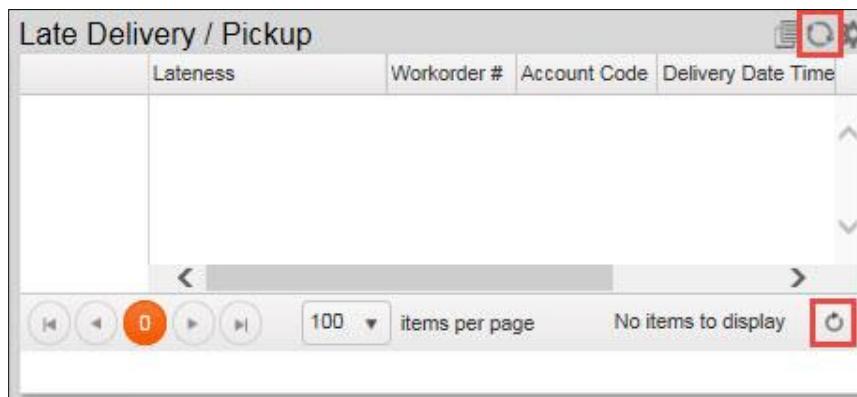
To remove a sort column, select it from the Fields Chosen and click **Remove**.

Click **Sort** to save your changes.

Reload/Refresh

At the top right of each grid on the dashboard is a Reload icon. It clears the grid data, recomputes all rows and displays the current page of rows.

At the bottom right of each grid on the dashboard is a Refresh icon. It requeries the existing page of rows and displays them.



Late Delivery/Pickup

You can select the query you want to display in the **Grid Setup** dialog box.

Click on the Workspace icon at the top of the grid to take you to the actual **Workorder** grid which displays all workorders with a Required by Date and Time greater than the Delivery Date and Time.

NOTE: The data you see in the **Workorder** grid when you click on the Workspace icon will not necessarily match the data that is displayed in the grid on the dashboard.

Workorders

You can select the query you want to display in the **Grid Setup** dialog.

Click on the Workspace icon at the top of the grid to take you to the actual **Workorder** grid which displays all workorders with a Required by Date within the last ten days that have not yet been completed.

NOTE: The data you see in the **Workorder** grid when you click on the Workspace icon will not necessarily match the data that is displayed in the grid on the dashboard.

Item Process Control

You can select the query you want to display in the **Grid Setup** dialog.

Click on the Workspace icon at the top of the grid to take you to the actual **Item Process Control** grid which displays all items placed on a workorder within the past 7 days that have not yet been placed on a picklist.

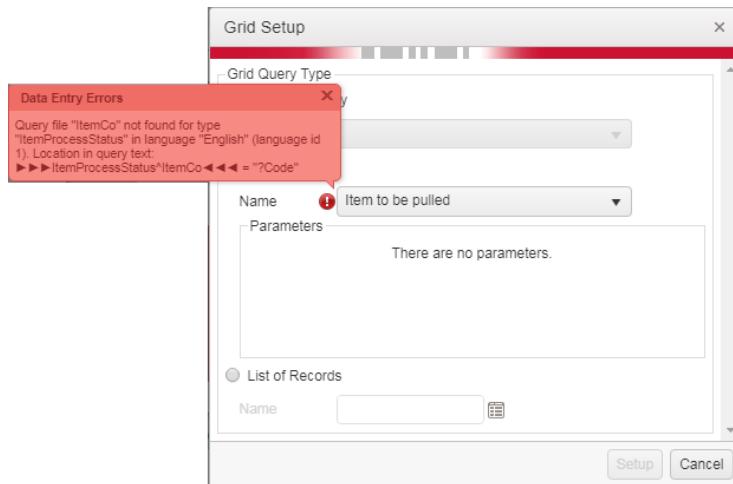
NOTE: The data you see in the **Item Process Control** grid when you click on the Workspace heading will not necessarily match the data that is displayed in the grid on the dashboard.

Dashboard/Alert Errors

An error icon is displayed next to items on the dashboard (indicator, chart, grid) if that item generated an exception while refreshing data. An error icon is also displayed next to alerts or notifications if they generated an exception while refreshing data.

Click on the icon to display one of the following:

- A user error explaining why the error occurred. It is possible that changing the settings will resolve the problem and remove the error icon.



- A system error, in which case you will need to provide the error code to O'Neil Technical Support for assistance.



Workspaces

You can quickly return to the dashboard at any time by selecting it from your list of Workspaces.

Click or hover over the **O'Neil Stratus** button to display the menu options and open Workspaces.



Maintenance

Maintenance Overview

The **Maintenance** option under the **Administration** menu offers a large selection of functions that help you set up and maintain O'Neil Stratus. Functions found under this option are critical to the running and maintenance of O'Neil Straus. Be sure to limit access to all functions in this area for most users on the system.

Activity Grid

The **Activity** grids allow you to view all activity stored in the system. Through these grids you can create queries to find any activities that match any criteria. These are very powerful grids, as you can edit and delete actions and activities that the system has generated through your daily activities. Access to these grids should be limited to administrative personnel, and the ability to edit or delete data should be turned off for all users.

You will find that creating reports through the **Activity** grids can be very valuable. You can determine what types of activities are conducted at what intervals for customers. You can determine the productivity of your personnel, and the times of day that are most productive in your facility.

NOTE: This grid is very powerful. Editing or deleting items on this grid can destroy the integrity of your system. Be sure to restrict access to this grid for all users! We recommend that you only allow access to the ADMIN when a specific change must be made. Then turn it off again.

Activity Set Codes

In the **Activity** grid, you can conduct searches on Activity Sets as well as activities. In order to conduct a search on Activity Sets, you must know the system-assigned Activity Set Code. The code is displayed in the ID column in both the **Base** and **Account Activity Set** grids available from the **Administration** menu, **Activity Set** submenu.

4353	Container Add/Edit Add
4354	Container Add/Edit Move
4368	Container Add/Edit Pending
4370	Container Add/Edit Destroyed to In
4371	Container Add/Edit Destroyed to Out
4372	Container Add/Edit Destroyed to Permout
4385	Container Add/Edit In to Destroyed
4387	Container Add/Edit In to Out
4388	Container Add/Edit In to Permout
4401	Container Add/Edit Out to Destroyed

4402	Container Add/Edit Out to In
4404	Container Add/Edit Out to Permout
4417	Container Add/Edit Permout to Destroyed
4418	Container Add/Edit Permout to In
4419	Container Add/Edit Permout to Out
4609	Container Import Add
4610	Container Import Move
4624	Container Import Pending
4626	Container Import Add/Edit Destroyed to In
4627	Container Import Add/Edit Destroyed to Out
4628	Container Import Add/Edit Destroyed to Permout
4641	Container Import Add/Edit In to Destroyed
4643	Container Import Add/Edit In to Out
4644	Container Import Add/Edit In to Permout
4657	Container Import Add/Edit Out to Destroyed
4658	Container Import Add/Edit Out to In
4660	Container Import Add/Edit Out to Permout
4673	Container Import Add/Edit Permout to Destroyed
4674	Container Import Add/Edit Permout to In
4675	Container Import Add/Edit Permout to Out
4865	Container Comm Session Add
4866	Container Comm Session Move
4867	Container Comm Session Refile
4868	Container Comm Session Pick-Val
4869	Container Comm Session Truck-Val
4870	Container Comm Session Deliv-Val
4871	Container Comm Session Pickup-Val
4872	Container Comm Session Access-Val
4873	Container Comm Session Receive-Val
4874	Container Comm Session Destroy-Val
4875	Container Comm Session Inventory
4876	Container Comm Session Content Val
4879	Container Comm Session Docins-Val
5121	Container Workorder Access
5122	Container Workorder Delivery
5123	Container Workorder Destroy
5124	Container Workorder Permout
5125	Container Workorder Pickup
5126	Container Workorder Receive
5131	Container Workorder DocImage
5132	Container Workorder Image
8449	Filefolder Add/Edit Add
8450	Filefolder Add/Edit Move
8464	Filefolder Add/Edit Pending
8466	Filefolder Add/Edit Destroyed to In
8467	Filefolder Add/Edit Destroyed to Out
8468	Filefolder Add/Edit Destroyed to Permout
8481	Filefolder Add/Edit In to Destroyed
8483	Filefolder Add/Edit In to Out
8484	Filefolder Add/Edit In to Permout
8497	Filefolder Add/Edit Out to Destroyed
8498	Filefolder Add/Edit Out to In

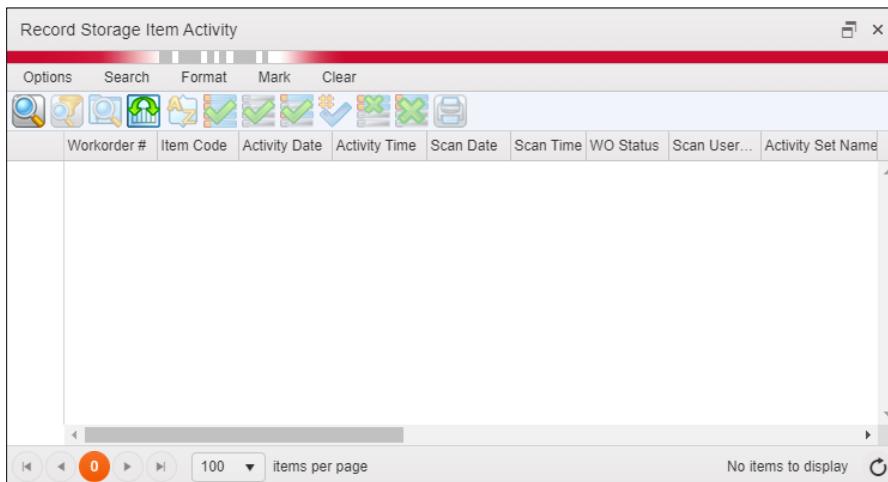
8500	Filefolder Add/Edit Out to Permout
8513	Filefolder Add/Edit Permout to Destroyed
8514	Filefolder Add/Edit Permout to In
8515	Filefolder Add/Edit Permout to Out
8705	Filefolder Import Add
8706	Filefolder Import Move
8720	Filefolder Import Pending
8722	Filefolder Import Destroyed to In
8723	Filefolder Import Destroyed to Out
8724	Filefolder Import Destroyed to Permout
8737	Filefolder Import In to Destroyed
8739	Filefolder Import In to Out
8740	Filefolder Import In to Permout
8753	Filefolder Import Out to Destroyed
8754	Filefolder Import Out to In
8756	Filefolder Import Out to Permout
8769	Filefolder Import Permout to Destroyed
8770	Filefolder Import Permout to In
8771	Filefolder Import Permout to Out
8961	Filefolder Comm Session Add
8962	Filefolder Comm Session Move
8963	Filefolder Comm Session Refile
8964	Filefolder Comm Session Pick – Val
8965	Filefolder Comm Session Truck –Val
8966	Filefolder Comm Session Deliver –Val
8967	Filefolder Comm Session Pickup – Val
8968	Filefolder Comm Session Access – Val
8969	Filefolder Comm Session Receive – Val
8970	Filefolder Comm Session Destroy – Val
8971	Filefolder Comm Session Inventory
8973	Filefolder Comm Session Locate Val
8974	Filefolder Comm Session Restore Val
8975	Filefolder Comm Session Docins - Val
9217	Filefolder Workorder Access
9218	Filefolder Workorder Delivery
9219	Filefolder Workorder Destroy
9220	Filefolder Workorder Permout
9221	Filefolder Workorder Pickup
9222	Filefolder Workorder Receive
9227	Filefolder Workorder DocImage
9228	Filefolder Workorder Image
12545	Document Add/Edit Add
12801	Document Import Add
13321	Document Workorder Handling-Out
13322	Document Handling-In
13323	Document Workorder Image
16384	Image View (only applied to RSWeb.NET)
16385	Image Fax (for future use)
16386	Image E-mail (for future use)
16387	Image Scan
16388	Image Purge
16641	Image Add/Edit Add

16897	Image Import Add (for future use)
28929	Tape Add/Edit Add
28930	Tape Add/Edit Move
28944	Tape Add/Edit Pending
28946	Tape Add/Edit Destroyed to In
28947	Tape Add/Edit Destroyed to Out
28948	Tape Add/Edit Destroyed to Permout
28961	Tape Add/Edit In to Destroyed
28963	Tape Add/Edit In to Out
28964	Tape Add/Edit In to Permout
28977	Tape Add/Edit Out to Destroyed
28978	Tape Add/Edit Out to In
28980	Tape Add/Edit Out to Permout
28993	Tape Add/Edit Permout to Destroyed
28994	Tape Add/Edit Permout to In
28995	Tape Add/Edit Permout to Out
29185	Tape Import Add
29186	Tape Import Move
29200	Tape Import Pending
29202	Tape Import Destroyed to In
29203	Tape Import Destroyed to Out
29204	Tape Import Destroyed to Permout
29217	Tape Import In to Destroyed
29219	Tape Import In to Out
29220	Tape Import In to Permout
29233	Tape Import Out to Destroyed
29234	Tape Import Out to In
29236	Tape Import Out to Permout
29249	Tape Import Permout to Destroyed
29250	Tape Import Permout to In
29251	Tape Import Permout to Out
29441	Tape Comm Session Add
29442	Tape Comm Session Move
29443	Tape Comm Session Refile
29444	Tape Comm Session Pick –Val
29445	Tape Comm Session Truck – Val
29446	Tape Comm Session Deliver – Val
29447	Tape Comm Session Pickup – Val
29448	Tape Comm Session Access – Val
29449	Tape Comm Session Receive – Val
29450	Tape Comm Session Destroy – Val
29451	Tape Comm Session Inventory
29453	Tape Comm Session Locate Val
29454	Tape Comm Session Restore Val
29697	Tape Workorder Access
29698	Tape Workorder Delivery
29699	Tape Workorder Destroy
29700	Tape Workorder Permout
29701	Tape Workorder Pickup
29702	Tape Workorder Receive

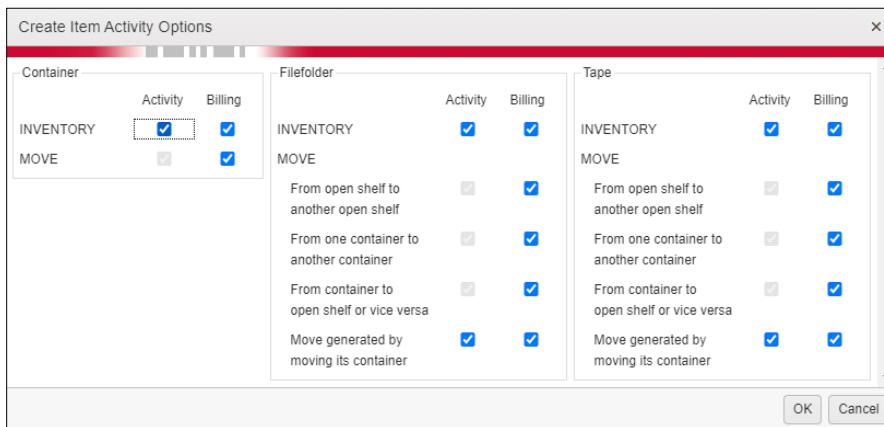
Reducing the Volume of Item Activity

A feature is available in the **Item Activity** grid to help reduce operations and billing activity for inventory or moves. The purpose of this activity reduction is to improve database performance and reduce database growth.

From the **Administration** menu, **Maintenance** submenu, select **Activity**, and then **Item**. The **Item Activity** grid appears.



From the **Options** menu, select **Setup**. The **Create Item Activity Options** dialog box appears.



Container

By default, all options in the Container section are selected. This means that all item activity is created as usual for containers. If you do not want to create the activity, clear the check box.

For Inventory activity you can choose to turn off Activity and Billing, or just Billing. If you turn off Activity, Billing is automatically turned off. Likewise, if you select Billing, Activity is automatically selected.

Activity for Moves must always be created, however you can turn off Billing for Moves.

Filefolder / Tape

As with containers, all options are selected by default. The Inventory section works the same as for containers. However, there are different Move options available.

For Moves, Activity cannot be turned off for the following cases:

- From open shelf to another open shelf

- From one container to another container
- From container to open shelf or vice versa

Billing can be turned off for these three cases.

NOTE: Any time a Billing check box is selected, the corresponding Activity check box is automatically selected.

Charge Detail

The **Charge Detail** grids allows you to view activities, but limits the amount of editing you can do. You cannot delete any activities from this grid. You can load activities onto the grid using any criteria.

Record Storage Activity Charge Detail						
	Account Code	Action Code	Action Description	Apply Charge	Cost Center	
1	1000	ADD	Add	Yes		
2	1000	ADD	Add	Yes		
3	1000	ADD	Add	Yes		
4	1000	DELIVERY	Delivery	Yes		
5	1000	PULL	Pull	Yes		
6	1000	DELIVERY	Delivery	Yes		
7	1000	PULL	Pull	Yes		
8	1000	DELIVERY	Delivery	Yes		
9	1000	DELIVERY	Delivery	Yes		
10	1000	PULL	Pull	Yes		
11	1000	PICKUP	Pickup	Yes		

Items per page: 100

Through the **Charge Detail** grid you can edit only the Apply Charge field and the Bill-To Account. You may find this grid handy since you probably deny access to the **Activity** grid for all of your employees. By allowing your more advanced users access to this grid instead of the **Activity** grid, you lower the chance of damaging your system's integrity. But be aware that this grid is still very powerful and can change the integrity of your billing. Be sure to restrict the editing functions on this grid for most of your users.

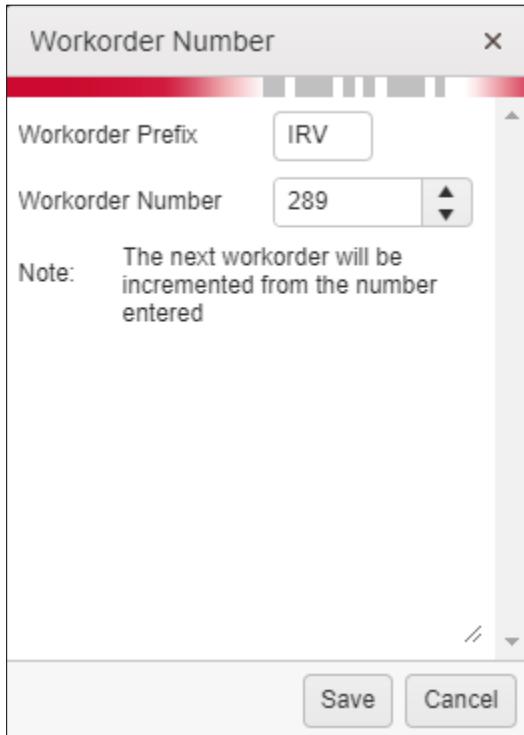
NOTE: Be aware that when you change the account associated with an activity, it is reflected in the Account column. The Account column in this grid (and in the **Activity** grid) displays the account that was charged for the activity, not necessarily the account that owns the container or filefolder, or the account that requested that the activity take place.

The editing capabilities of this grid can be used when you Override Charges on workorders, then choose to charge for some individual activities, or to turn off charges on certain activities. It can also be used when you change the account to be charged for an activity (or activities). For more information on these functions, please see the *Charge Detail* section of the *Workorders* chapter in the *Operations User's Guide*.

For the most part, you will want to conduct Overrides and Bill-To Changes through the **Workorder** grid under the **Operations** menu. However, this grid allows you to complete these functions for more than one workorder at a time.

Workorder Number

O'Neil Stratus allows you to determine the next workorder number you want the system to assign. Each time a new workorder or pre-workorder is created in the system, it is assigned the next sequential number. You can also set a workorder prefix. To set the next workorder number from the **Administration** menu, **Maintenance** submenu, select **Workorder Number**.



Enter a Workorder Prefix. This field is optional and can be up to three alphanumeric characters. Next, enter the Workorder Number you want to begin with. Click **Save**.

The prefix is then added before the Workorder Number. The necessary number of zeros is added between the Prefix and the Number to result in a valid length of eight characters. For example, in the screenshot above, the next workorder number would be IRV00290.

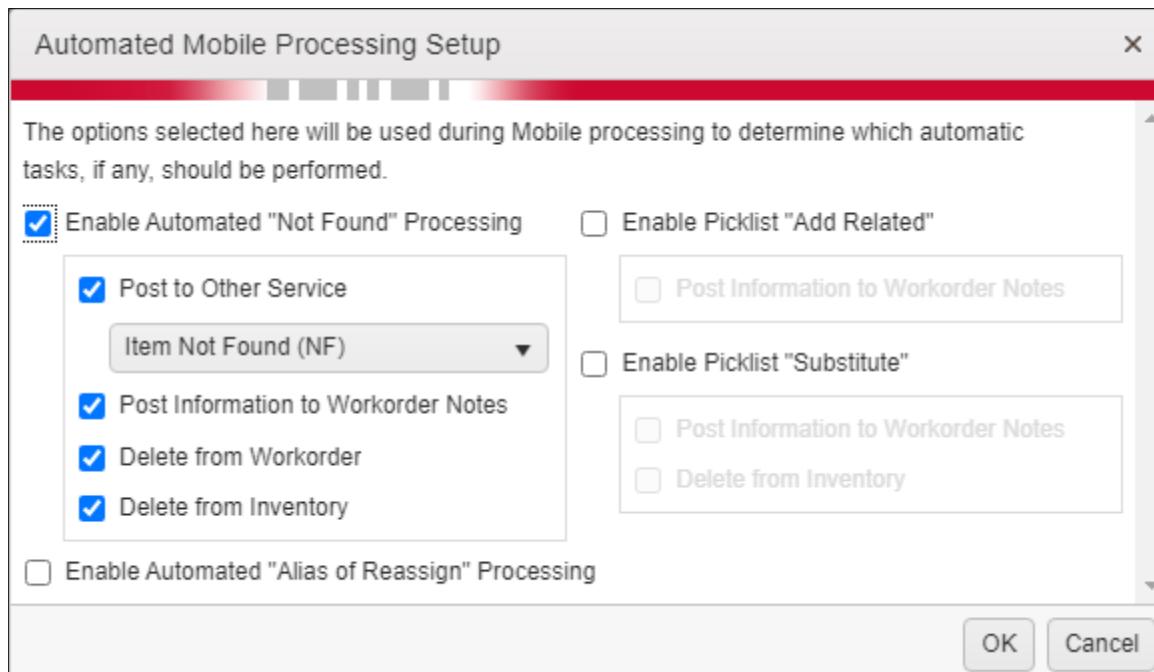
If the total length of the workorder Prefix and the Workorder Number is greater than eight, you receive an error message and will need to adjust the fields accordingly.

If you reset the workorder number to one that already exists, O'Neil Stratus does not create the workorder, and you receive an error when you try to save the workorder. You must come back to this dialog box and reset the number beyond the range for which workorders already exist.

Automated Mobile Processing

Automated Mobile Processing allows you to select options that are used during RSMobile/O'Neil Mobile processing to determine which automatic tasks should be performed.

From the **Administration** menu, **Maintenance** submenu, select **Automated Mobile Processing**.



Enable Automated "Not Found" Processing: Selecting this option tells the system to process a "Not Found" exception automatically on processing the communication session. When this option is selected, the other options in this dialog box become available for editing.

This function allows you to automatically charge for any items scanned as "Not Finds" in RSMobile/O'Neil Mobile processing by specifying an Other Service that is added to the workorder for each item not found. The details of the requested item that was not found can be appended to the workorder notes and/or saved as comments for the "Other Services" on the workorder. The item can be removed from the workorder and also from inventory.

Post to Other Service: This option allows you to select which Other Service appears on your customers' workorders. In the dialog box above, we used the Item Not Found action, which we set up in the Actions/Other Services Sublist area. All Other Services that you have set up in your system appear in the drop down menu.

Post Information to Workorder Notes: This option tells the system to include a note in the Workorder Notes area of your workorders, telling your customer that the item they requested was not found.

Delete from Workorder: When this option is selected, any items that you added to the workorder that were then scanned as Not Found, are deleted from the workorder. The assumption is that since they were not found, they will not be delivered. The item is not deleted from the workorder if there is any validation record for the item on this workorder. For example, if a truck_val exists, the item is not deleted from the workorder.

Delete from Inventory: When this option is selected, any items that were scanned as Not Found, are deleted from the database. Before deleting the item from inventory, the system checks for the following. An item is not deleted from inventory:

- If the item was added to the database over 7 days ago.
- If there is any activity for the item on any other workorder.
- If there is any "non-add" activity for the item that is not associated with a workorder. (Activity not associated with any workorder must be "add" activity; otherwise the item should not be deleted from inventory – this means the "Add/Edit ADD" type of add only; "Import ADD" and "Comm Session ADD" do not follow this rule.)

- If there is any activity for the item on this workorder other than 'Access', 'Delivery', 'Destroy' or 'Perm Out'.
- If there are any filefolders or tapes contained in the item.

Enable Automated "Alias of Reassign" processing: This option tells the system to retain the original Item Code as an alias when the original barcode is Reassigned to a new barcode number.

Enable Picklist "Add Related": The Add Related feature allows new "related" items to be added to a Picklist from within RSMobile/O'Neil Mobile. You may be searching for an unregistered "Robert Smith" filefolder. When you locate the filefolder, you discover that there are actually three Robert Smith filefolders. You can then use the Add Related feature to add the additional two filefolders to the picklist, which also adds them to the workorder. By default, this feature is turned off.

There is no Add Related option to specify whether or not to attempt to add the related item to inventory. If a related item does not yet exist in the database, O'Neil Stratus will attempt to add it during processing.

NOTE: When this setting is changed, the RSMobile scanner needs to be initialized before the change takes place on the scanner. If Add Related is turned on and later turned off, the menu option will still appear on the scanner until it has been re-initialized. In this case if the option is used on the scanner, the following exception will be generated when processing: *The Picklist 'Add Related' feature is not enabled.*

Post Information to Workorder Notes: The Post Information to Workorder Notes is optional, although it is recommended that it always be enabled. The information placed into the notes is very informative, and logs actions that would be essentially silent otherwise.

Enable Picklist "Substitute": The Substitute feature allows for easy substitution of one Picklist item for another. You may be searching for an unregistered filefolder. When you locate the filefolder, you discover it already has a barcode. You can then use the Substitute feature to substitute the barcoded filefolder for the unregistered one on the picklist. By default, this feature is turned off.

Post Information to Workorder Notes: The Post Information to Workorder Notes is optional, although it is recommended that it always be enabled. The information placed into the notes is very informative, and logs actions that would be essentially silent otherwise.

Delete from Inventory: Automatically deletes the original requested item from inventory. Before deleting the item from inventory, the system checks for the following. An item is not deleted from inventory:

- If the item was added to the database over 7 days ago.
- If there is any activity for the item on any other workorder.
- If there is any "non-add" activity for the item that is not associated with a workorder. (Activity not associated with any workorder must be "add" activity; otherwise the item should not be deleted from inventory – this means the "Add/Edit ADD" type of add only; "Import ADD" and "Comm Session ADD" do not follow this rule.)
- If there is any activity for the item on this workorder other than 'Access', 'Delivery', 'Destroy' or 'Perm Out'.
- If there are any filefolders or tapes contained in the item.

The Reassign feature lets you reassign one barcode to another one. While processing a Reassign, if the target of the reassignment already exists, rather than generate an exception, a Substitution can be attempted if:

- the Substitute feature is enabled, and
- the Reassignment is done in a Picklist

A reassignment from RSMobile/O'Neil Mobile does not qualify for substitution unless it occurs to an item on a Picklist. For more information on the Reassign feature, see the *Reassign (Func + 2)* section of the *RSMobile* or *O'Neil Mobile* chapter in the Operations User's Guide.

Barcode Auto-Incrementing

This option allows you to set up a sequence of barcodes for each base object type. These barcodes are used when you add items "on-the-fly" in the **Workorder Item Query and Post** grid or in RSWeb.NET.

From the **Administration** menu, select **Maintenance**, and then **Barcode Auto-Incrementing**. The following dialog box appears:

Auto-generated Item Codes

Enter the next code to use for each item type. Non-numeric characters may be used, but only the right-most contiguous digits will be incremented. When these right-most digits all reach '9', the sequence will be exhausted and must be reset.

The following applies in O'Neil Stratus:

<input checked="" type="checkbox"/> Container	C90003	9997	remaining
<input checked="" type="checkbox"/> Filefolder	F600006	399994	remaining
<input checked="" type="checkbox"/> Tape	T10000000	90000000	remaining

The following applies in RSWeb:

<input type="checkbox"/> Container	DISABLED	0	remaining
<input type="checkbox"/> Filefolder	DISABLED	0	remaining
<input type="checkbox"/> Tape	DISABLED	0	remaining

The following applies in O'Neil Bridge:

<input type="checkbox"/> Container	DISABLED	0	remaining
<input checked="" type="checkbox"/> Filefolder	FF60914	39086	remaining
<input checked="" type="checkbox"/> Tape	TP0060914	9939086	remaining

OK **Cancel**

Select the check box next to the type of item code you want to set up (Container, Filefolder, or Tape), and enter the first Item Code you want assigned. You must enter the same number of characters as the system uses to identify the item. If you use eight characters in your container barcodes, the code listed here must be eight characters. The number of remaining barcodes, shown to the right of the field remains zero until the correct number of digits for that item is entered. Then the number reflects the number of Item Codes that the system can use in auto-incrementing. The system only increments numbers at the far right of the Item Code, not any alphabetical or non-numeric characters that might appear in the code.

NOTE: Auto-Generated Item Codes cannot contain any underscores (_) or percent (%) characters as these are query wild card characters and will not perform properly in queries.

Barcode Lengths

During operations, O'Neil Stratus initially identifies objects (Containers, Filefolders, Tapes, Locations, and Users) by their barcode's character length. You can set up these identifying lengths to fit your environment. The lengths can be assigned up to 15 characters, and how you associate the lengths with Objects is up to you.

You can also have a second length for any Object if you like. For example, Filefolder barcodes could be set to lengths of 11 and 12, but no two objects can use the same length barcodes.

Consider carefully when you determine the barcode lengths you require for your Containers, Filefolders, Tapes, Locations, and Users.

NOTE: Once you start using the system, you cannot change barcode lengths without extensive manual work. Be sure of the lengths you want before you set them.

Barcode Lengths are established from the **Administration** menu, **Maintenance** submenu, **Barcode Lengths** option. When the grid appears on the screen, all established barcode lengths appear.

Record Storage Barcode Length			
Barcode Length		Assignment Obj...	Barcode Description
1	2	USER	User
2	6	CONTAINER	Container
3	5	LOCATION	Location
4	7	FILEFOLDER	Filefolder
5	9	TAPE	Tape
6	10	CONTAINER	ABC Med Container
7	13	FILEFOLDER	Filefolder 2

To add additional lengths, right click in the grid and select **Add**. Each barcode length consists of the Barcode Length, the Object the barcode represents, and a barcode description.

Barcode Length Add	
Barcode Length	<input type="text"/>
Assignment Object Code	<input type="text"/>
Barcode Description	<input type="text"/>
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

Consider carefully the number of characters you set for each Object type. We recommend just two or three characters for Users. It is unlikely that you will have a need for more, since codes can be numerical and/or alphabetical. Keep in mind that as you grow, you may outgrow the number of characters in your barcodes. Don't limit yourself.

In general, the object with the fewest number of items is Users. The next would be Locations, then Containers, and the objects with the potentially highest number of items would be Filefolders and Tapes. Plan the number of characters accordingly, so you won't have limitations to worry about at a later time.

Possible Barcode Length Scenario:

Length	Object	Description
2	Users	User Barcodes
5	Locations	Location Barcodes
6	Containers	Container Barcodes
7	Filefolders	Filefolder Barcodes
8	Tapes	Tape Barcodes

This is not a bad set of barcode lengths for a new record center. However, there are obvious implied limits. If you stick to numeric Locations, the maximum Locations that you can have is 100,000, or 00000 through 99999. Six characters for Containers gives you the possibility of 1,000,000 container barcodes, or 000000 through 999999. This may not seem like much of a limitation if you are just starting out, but what if you are very successful! Plan for growth. By adding one or two characters to each length or by also including letters of the alphabet, you can dramatically increase your number of possible items.

Better Barcode Length Scenario:

Length	Object	Description
2	Users	User Barcodes
7	Locations	Location Barcodes
9	Containers	Container Barcodes
11	Filefolders	Filefolder Barcodes
13	Tapes	Tape Barcodes

However, be aware that the larger the number of barcode characters, the larger the barcode. A barcode length of 15 requires a longer label, a slightly longer scan time, and makes more likely the possibility of damage, unreadability, and misreads.

As mentioned earlier, you can define different lengths for the same barcode type as long as no length is used more than once. For example, suppose you defined your barcode lengths as in the first scenario and you were so successful that you ran out of 5-character barcodes for Locations in the first year. You could choose barcode lengths of 4 and/or 9 in addition to 5 for Location barcode length and have enough to manage for quite some time.

User Defined Fields

In the **Container**, **Filefolder** and **Tape Add** and **Edit** dialog boxes (used for data entry), there is an area that is available for five user defined fields (see screen shot below). You may create up to four free-text fields of 25 characters each, and one date field.

Container Add

Description...	Contents...
Code	<input type="text"/> Container
Alternate Code	<input type="text"/>
Description	<input type="text"/>
Location Code	<input type="text"/>
Object Code	CONTAINER
Containee Type	<input type="text"/>
Security Code	<input type="text"/>
Category Code	<input type="text"/>
Record Series	<input type="text"/>
Set	<input type="text"/>
Item Status	In
Status Date	8/18/2020 6:39 AM
Add Date	8/18/2020 6:39 AM
Destroy Date	<input type="text"/>
Access Count	0
Perm Flag	No

User Defined

User Defined Field 1	<input type="text"/>
User Defined Field 2	<input type="text"/>
User Defined Field 3	<input type="text"/>
User Defined Field 4	<input type="text"/>
CUSTOM DATE	<input type="text"/>

Add Cancel

The fields are indexed by the system, and you can query for Containers, Filefolders, and Tapes by searching on these fields.

Creating User Defined Fields

To name the fields to meet your needs, from the **Administration** menu, **Maintenance** submenu, select **User Defined Fields**. The three sets of fields available appear on the grid. One for Containers, one for Filefolders, and one for Tapes.

Record Storage User Defined Fields

						Options	Format	Mark
	Object Code	User Defined Field 1	User Defined Field 2	User Defined Field 3	User Defined Field 4	User Defined Date		
1	CONTAINER	User Defined Field 1	User Defined Field 2	User Defined Field 3	User Defined Field 4	CUSTOM DATE		
2	FILEFOLDER	CUSTOM FIELD 1	CUSTOM FIELD 2	CUSTOM FIELD 3	CUSTOM FIELD 4	CUSTOM DATE		
3	TAPE	CUSTOM FIELD 1	CUSTOM FIELD 2	CUSTOM FIELD 3	CUSTOM FIELD 4	CUSTOM DATE		

1 - 3 of 3 items

Right click on a line and select **Edit** to define the field names.

User Defined Fields EDIT

Object Code	FILEFOLDER	<input type="button" value="grid icon"/>	<input type="button" value="up arrow"/>
User Defined Field 1	CUSTOM FIELD 1		
User Defined Field 2	CUSTOM FIELD 2		
User Defined Field 3	CUSTOM FIELD 3		
User Defined Field 4	CUSTOM FIELD 4		
User Defined Date	CUSTOM DATE		<input type="button" value="down arrow"/>

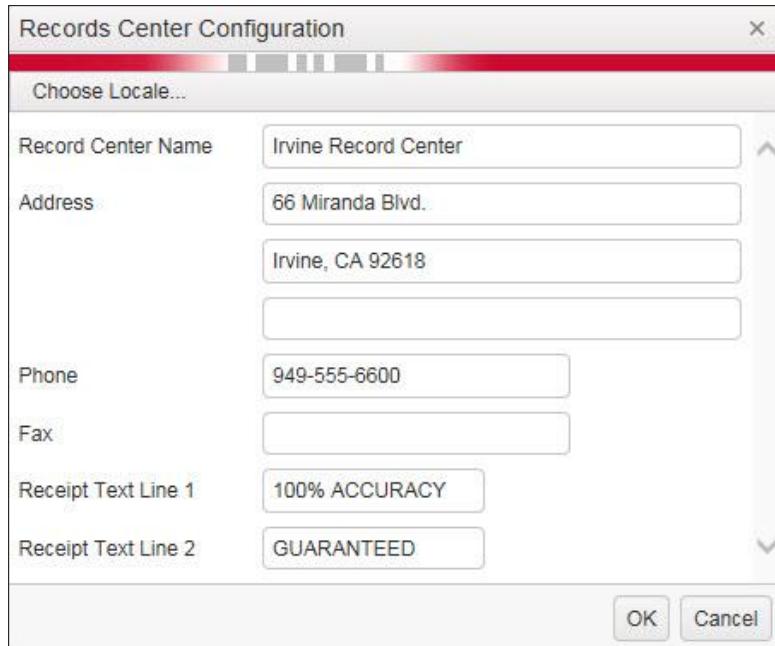
Enter names for only the fields that you want to appear on your **Container**, **Filefolder**, and **Tape** dialog boxes and grids. Any fields that are not named do not appear at all on those screens. Don't forget that the fifth field is a date.

When the fields have been named by the user and are a part of the system, they appear on the **Item Add/Edit** dialog boxes with those field names. However, in **Query** dialog boxes, the fields appear under their system names of UserDefinedDate and UserDefinedField1 – 4.

If the User Defined Fields are not defined, they do not appear in **Item Add/Edit** dialog boxes or grids, but still appear in queries.

Records Center Configuration

O'Neil Stratus allows you to set up and change your company name and information, as you like. This information appears on reports and receipts. The Record Center Name, Address, Phone and Fax appear on invoices and reports. The Receipt Text lines appear on receipts printed by the microFlash printer. To enter or edit your Records Center Configuration, from the **Administration** menu, **Maintenance** submenu, select **Records Center Config**.



Records Center Name: Your record storage facility's name should be entered here. There are 35 character spaces available.

Address: Three lines, with 35 characters each, are available for your facility's address.

Phone/Fax: With 20 characters per field, you can enter area codes and extensions.

Receipt Text Line 1: and 2: When you use a scanner to issue receipts to your clients, you can enter text in these two fields and it prints on the receipts. Since it is user-definable, you can enter seasonal greetings, company news, or special offers. Each line holds 15 characters.

Choose Locale

Choose Locale allows you to choose the default locale. This is used when printing workorders and invoices so that the dates and the number of currency decimal places are based on the locale (regional settings). To set the locale, in the **Record Center Configuration** dialog box click **Choose Locale**.

Records Center Configuration

Choose Locale...

Record Center Name	Irvine Record Center
Address	66 Miranda Blvd.
	Irvine, CA 92618
Phone	949-555-6600
Fax	
Receipt Text Line 1	100% ACCURACY
Receipt Text Line 2	GUARANTEED

OK **Cancel**

The list of available locales is displayed.

Choose Locale

Locale (used for printing invoices and workorders)

Name	Display Name	Native Name
en-MY	English (Malaysia)	English (Malaysia)
en-NZ	English (New Zealand)	English (New Zealand)
en-PH	English (Republic of the Philippines)	English (Philippines)
en-SG	English (Singapore)	English (Singapore)
en-TT	English (Trinidad and Tobago)	English (Trinidad and Tobago)
en-US	English (United States)	English (United States)
en-ZA	English (South Africa)	English (South Africa)
en-ZW	English (Zimbabwe)	English (Zimbabwe)
es	Spanish	español
es-419	Spanish (Latin America)	español (Latinoamérica)
es-AR	Spanish (Argentina)	español (Argentina)
es-BO	Spanish (Bolivia)	español (Bolivia)
es-CL	Spanish (Chile)	español (Chile)
es-CO	Spanish (Colombia)	español (Colombia)
es-CR	Spanish (Costa Rica)	español (Costa Rica)
es-DO	Spanish (Dominican Republic)	español (República Dominicana)
es-EC	Spanish (Ecuador)	español (Ecuador)
es-ES	Spanish (Spain)	español (España, alfabetización internacional)
es-GT	Spanish (Guatemala)	español (Guatemala)
es-HN	Spanish (Honduras)	español (Honduras)
es-MX	Spanish (Mexico)	español (México)

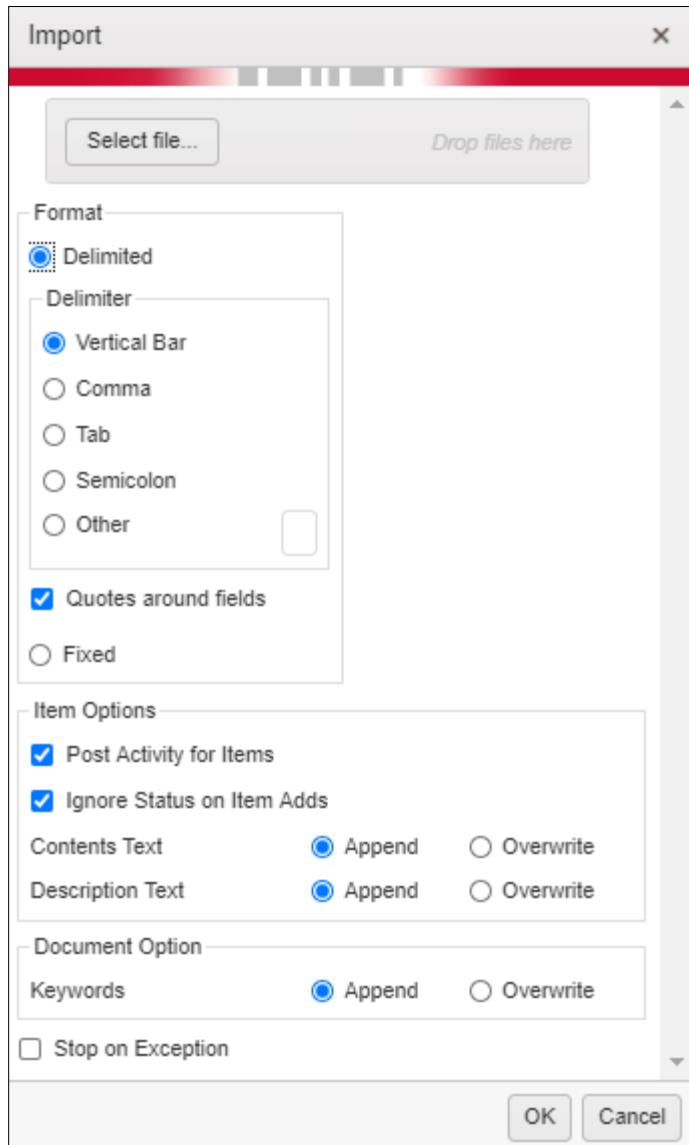
OK **Cancel**

Select the locale and click **OK**.

Import

The Import function accessed through the **Administration** menu allows you to import data that applies to multiple grids. When you import data through a grid within the system, only information pertaining to that grid can be imported. However, through this function, any applicable, properly formatted data can be imported into the system.

Access the **Import** dialog box through the **Administration** menu, **Maintenance** submenu, **Import** option. For extensive details on import formats and importing data, please see the *Importing* chapter.



Exceptions

When O'Neil Stratus cannot properly incorporate import data into the system, it generates exceptions. These exceptions appear in the **Exception** grid, found under the **Administration** menu, **Maintenance** submenu, **Exceptions** option.

Record Storage Exception			
Options Search Format Mark Clear			
	Grid	Exception Code	Exception Message
1	Container	31151	Import record TYPE is invalid.
2	Item	31153	Length of an import record FIELD is invalid.
3	Item	31124	Item does not exist.
4	Item	31153	Length of an import record FIELD is invalid.
5	Item	31153	Length of an import record FIELD is invalid.

The Exception Code tells you what the problem was in the import. Once you know what the problem is, you can correct it. For more information and a list of Import Exception Codes, see the *Importing* chapter.

Chart of Accounts Cross Reference

This function is used with the Financial Export function in O'Neil Stratus. The Financial Export function allows you to export information from O'Neil Stratus to your accounting package. The accounting package you use in your facility will allow you to set up a Chart of Accounts where business transactions are identified and accounted for. Some of these Chart of Account (CoA) Accounts represent invoice transactions that can be imported from O'Neil Stratus. For example, a customer invoice for \$1,000 may be imported into accounting package CoA "Accounts Receivable" Code 1200. An amount of \$1,000 would be debited to CoA code 1200.

The Chart of Accounts Cross Reference function allows you to customize what categories of charges are exported to your accounting package CoA account and what level of detail or generality is needed. The basis for this is the Action/Object paradigm for setting up Transactions in O'Neil Stratus. For more information on the Financial Export option, see the *Financial Info Export* chapter.

Setting up CoA Cross References

To set up which action and object 'sets' will be applied to which Chart of Accounts accounts, you will establish them in the **CoA Cross Reference** grid of O'Neil Stratus. To reach this grid, from the **Administration** menu, select **Maintenance** and then **CoA Cross Reference**. The **CoA Cross Reference** grid appears.

Record Storage CoA Cross Reference		
Options Search Format Mark Clear		
Action Code	Object Code	Chart of Accounts Code

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

Chart of Account Cross Reference Add

Base Action	Action Code
Charges / Credits	<input type="text"/>
Document Services	<input type="text"/>
Electronic Storage	<input type="text"/>
Image Service	<input type="text"/>
Invoice	<input type="text"/>
Invoice Discount	<input type="text"/>
Minimum Charge	<input type="text"/>
Move	<input type="text"/>
Other Services	<input type="text"/>
Priority	<input type="text"/>
Recurring Service	<input type="text"/>
Sell	<input type="text"/>
Service	<input type="text"/>
Status Change	<input type="text"/>
Storage	<input type="text"/>
Surcharge	<input type="text"/>

Add Cancel

As you do in the **Transaction** dialog box, you select a Base Action, then O'Neil Stratus fills in the appropriate Action and Object codes, or a grid picker is made available for you to select your own Actions and Objects. You may then enter the Account Code appropriate to your Accounting Package.

Notice that O'Neil Stratus has, in this instance, defined Invoice and Invoice Discount as Actions. This does not occur anywhere else in O'Neil Stratus. This is how your accounting package will recognize them, so they are included here.

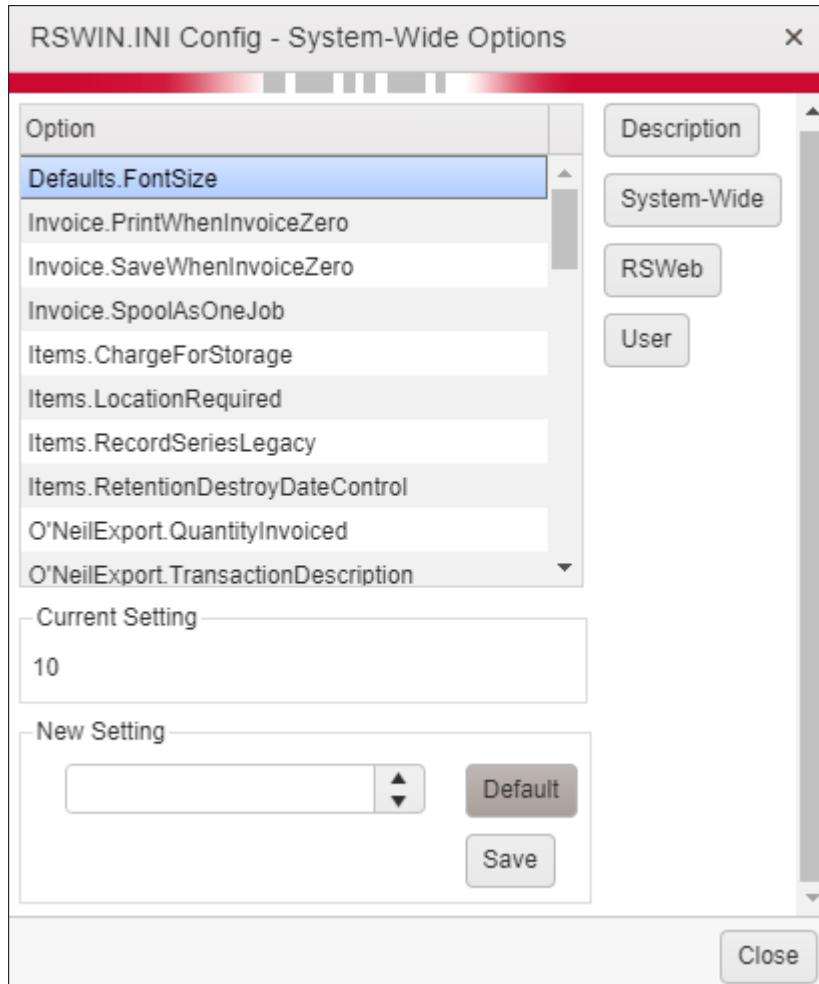
NOTE: Invoice and Invoice Discount are actually sub-actions of the Action "System." You can view them through the **Setup, Action** options in the program, and you can change their descriptions, but they are only used in the Financial Export area of the system.

You may also choose some more generalized Action/Object combinations than can be explicitly chosen in O'Neil Stratus. For example, you may choose to set up the Action/Object pair SERVICE-ITEM. This would be associated with a CoA value and the total charges for all Services performed on Filefolders, Containers, Container SubObjects, Tapes, and Tape SubObjects would be summarized and exported. Other possibilities not directly selectable for Transactions in O'Neil Stratus are SERVICE-STDBOX (total charges for all services performed on Standard Boxes), or ADD-ITEM (total charges for all Adds performed on all types of items).

RSWIN.INI Configuration

There are some functions in O'Neil Stratus that are configured through the **RSWIN.INI Config** dialog. Changes that can be made to the system include System-Wide, RSWeb, and User settings.

From the **Administration** menu, select **Maintenance** and then **RSWIN.INI Config**.



The dialog box above shows System-Wide Options. To access a list of RSWeb or User Options, click that button.

To view a description of each setting, highlight it and click **Description**. When a selection is highlighted, the Setting section at the bottom of the dialog box changes to allow you to enter an appropriate setting. Use the down arrow to the right of the New Setting field to change the setting. To return to the default setting, click **Default**. Click **Save** to save.

To activate system-wide changes on other computers, all users will have to close and reopen O'Neil Stratus.

RSWIN.INI Settings

Below are descriptions of some of the system-wide settings. Other settings are described in different chapters where they apply.

Options.OutputTextFileEncoding

This system-wide RSWIN.INI setting (Options.OutputTextFileEncoding) allows you to output text files as either ASCII or Unicode. The default is ASCII. Most text files written by O'Neil Stratus honor this encoding option.

Items.LocationRequired

If this system-wide RSWIN.INI setting (Items.LocationRequired) is set to Yes, a location is required when adding or editing an item. The default setting is No, which means a location is not required.

Options.WorkorderActivityBillingDate

This system-wide RSWIN.INI setting (Options.WorkorderActivityBillingDate) allows you to set the billing date to the workorder Create Date, Required by Date or Close Date.

The default setting is Create Date. When set to Create Date, the activity is billed using the date the workorder was created.

When set to Required By Date, the activity is billed using the Required By Date entered in the workorder. If no Required By Date is entered in the workorder, the activity is billed by the default Create Date. If the Required By Date is modified, the billing date on all related activity records is changed to the new date.

When set to Close Date, the activity is billed using the date the workorder was closed. In many cases the Close Date is not yet known at the time billing records are created. Therefore, the Create Date will be used as the billing date if no Close Date is available. Any change to the Close Date will cause all billing records for that workorder to be updated using that date. Workorders will not be included on an invoice until the workorder is closed and the Close Date is filled in.

The following applies when adding or editing workorders:

- All workorder related activity generated has the billing date set based on the INI option setting.
- If you change the billing date of an activity in the Item Activity grid, then change the Required By Date in the Workorder Edit dialog, the previous change is not reserved.

In addition to the above, the following applies to other areas:

- For scheduling, preworkorders, or web orders, the billing date is based on the INI setting in use when posting to a workorder.
- The workorder date printed on the invoice is based on the INI setting. If you want the workorder Create Date to print on the invoice for some accounts when the INI setting is set to Required By Date, you can purchase a custom Invoice Definition File from O'Neil.
- All activities created when processing the RSMobile/O'Neil Mobile scanner (such as Not Found) have the billing date set based on the INI setting.

An additional rule is enforced when set to use Close Date that is not enforced when set to use Create Date or Required By Date. When set to use Close Date, if the workorder's Close Date is changed, the billing date is changed to the Close Date if that workorder is not referenced on a saved invoice. However, if the workorder is referenced on a saved invoice, any changes to the workorder's Close Date will not change the billing date.

The following are examples of what happens if a new item is added or an existing item is edited on a workorder when the WorkorderActivityBillingDate=CloseDate.

If...	Then...
Workorder is closed, not invoiced, and item is added/edited	Bill date = Close date
Workorder is closed, invoiced, and item is added/edited	Bill date = Close date
Workorder is closed, not invoiced, re-opened, item is added/edited, and then it is re-closed	Bill date = Workorder create date until re-closed, then re-close date.
Workorder is closed, invoiced, re-opened, item is added/edited, and then it is re-closed	Bill date = Workorder create date

Web Batch/Tracking Number in Workorder Comments

The following RSWIN.INI settings allow you to add the web order batch and tracking numbers to the comments field and the printed workorder.

Options.SaveBatch#InWorkorderComment

Options.SaveTracking#InWorkorderComment

The default setting is No. When set to Yes, the batch and tracking numbers print on the workorder and also appear in the Comment field for the item in the **Activity Charge Detail** grid for that workorder.

NOTE: These settings do not apply to Bulk Items on a workorder.

Accounts with No Charges

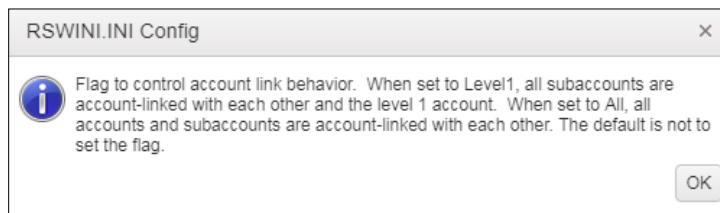
When you create invoices for your accounts, the system defaults to create, save and print invoices for all marked accounts on the **Invoice** grid, even if they don't have any charges accumulated for the billing cycle. This allows you to use the invoice numbers as an indicator that you have invoiced all your accounts. Through the ini settings, you have the option to not print or save invoices for these accounts - or any combination you like.

The two ini settings that refer to invoicing accounts with no charges are to "print invoices when their totals are zero" (Invoice.PrintWhenInvoiceZero), and to "save invoices when their totals are zero" (Invoice.SaveWhenInvoiceZero). The choices you have for each one are Yes or No. The following table shows all setting combinations and their results.

PrintWhenInvoiceZero	Yes (default)	Yes	No	No
SaveWhenInvoiceZero	Yes (default)	No	Yes	No
	Invoices with no charges are printed. They are assigned an invoice number, are saved and can be reprinted.	Invoices with no charges are printed. The invoice number is allocated, but the invoice is not saved and cannot be printed through the Reprint Invoice function	Invoices with no charges are saved for accounts with no charges, but they do not print out with your other invoices. They can be reprinted through the Reprint Invoice function.	Invoices are not created for accounts with no charges. No invoice numbers are allocated to those accounts. This is the only option alternative where no invoice numbers are assigned for accounts with no charges.

Options.AccountLinks

Also available in the RSWIN.INI file for System-Wide options is the Account Link function. As you can see from the dialog box below, there are two options.



Level1: When the Account Link function is set to Level 1, then all sub accounts of all Level 1 accounts are linked. All subaccounts have access to each other's containers and filefolders. For example, CITYHOSP\SURGERY can access CITYHOSP items. CITYHOSP\SURGERY can also access CITYHOSP\XRAY. All accounts within a Level 1 account are open to each other.

All: Every account in the system has the ability to access every other account's items through workorders. For example, CITYHOSP\SURGERY can now order items belonging to ABCCorp without having to specify the link in the **Workorder Account Links** grid.

Blank: The default setting (blank) closes all accounts to each other. To open access between accounts, use the **Workorder Account Links** function in the **Setup** option under the **Administration** menu. To open Level 2 and 3 accounts and enable the Level 1 or Level 2 accounts to access Level 2 and Level 3 accounts respectively, mark them as Open in the **Account Add/Edit** dialog box.

Charge for Storage

The Charge for Storage flag is available from the **Container**, **Filefolder**, and **Tape Add/Edit** dialog boxes. This flag allows you to turn off storage charges for individual files, tapes and containers. This option is useful if you want to charge storage for the tapes or files in a container, but not for the container itself - or vice versa. This function is made available through the RSWIN.INI file.

In the RSWIN.INI file, the options for the Charge for Storage setting are Auto and Manual. A blank setting is the same as Auto.

When set to Auto, the system works as follows:

- When a container is added to the system, the Charge for Storage flag is set to Yes (selected).
- When a tape or filefolder is added to the system, and is placed in a container, the Charge for Storage flag is set to No (cleared) for the tape or filefolder.
- When a tape or filefolder is added to the system, and placed in open shelf filing, the Charge for Storage is set to Yes (selected).

When set to Manual, the system works as follows:

- When a container is added to the system, the Charge for Storage flag is set to Yes (selected).
- When a filefolder/tape is added to an open shelf location, the Charge for Storage flag is set to Yes (selected).
- When a filefolder/tape is added to a container, the Charge for Storage flag for the filefolder/tape is set to No (cleared).
- The Charge for Storage flag on an item will not change regardless of where you move that item. For example, a filefolder that is in a container has its Charge for Storage flag set to No when it is initially added to the database. However, when you move the filefolder (by scanning or manual edits) to an open shelf location, the Charge for Storage flag does not change to Yes (and vice versa for filefolders in open shelves, scanned to a container).

Editing the Charge for Storage Setting – Points to Consider

- When you change the Charge for Storage setting in the RSWIN.INI file, no existing data is changed. It only affects items added to the system after the setting is changed.
- If you edit an existing container so that the Charge for Storage is turned off, no changes take place to the items in the container. For example, you have a container whose Charge for Storage is turned on, and the items in it have their Charge for Storage setting turned off. Therefore, you are charging storage for the container, but not for the items in it. If you turn the Charge for Storage setting off for the container, the Charge for Storage setting does not change for the items in the container. You are not charging storage for the box or for the items stored in it. To change the Charge for Storage setting for the items in a container, you must edit them.
- If you do not have transactions (Base or Account) set up in the system to charge for Filefolders or Tapes, no charge is generated for them, regardless of how the Charge for Storage flag is set.
- If the Charge for Storage flag is turned on for tapes that belong in a container and for the container, you charge for the storage of BOTH the container and the tape within it.

The auto/manual Charge for Storage rules apply to items added or modified by manual data entry, import or wand processing.

Setup

Category

Categories classify containers, filefolders and tapes according to what is found inside them. It is useful for searching, sorting, and reporting.

To set up Categories, from the **Administration** menu, **Setup** submenu, select **Category**. To add a new Category, right click anywhere in the grid and select **Add**.

The dialog box is titled "Category Add". It contains two input fields: "Category Code" and "Category Description". Below the fields are two buttons: "Add" and "Cancel".

Categories consist of a user-defined Code and Description. They are assigned to containers, filefolders, and tapes through their **Add/Edit** dialogs.

We suggest that you set up Categories to fit your clients' needs, and create them to be universal. For example, many of your customers may use Categories of "*Personnel Files*" and "*Canceled Checks*".

When your customers send in new boxes, you can, from their transmittals, determine the contents and assign a Category to them.

Review Reasons

Review Reasons work with Categories and Date Ranges to automatically calculate Review Dates. Review Reasons are entered from the **Administration** menu, **Setup** submenu, **Review Reason** option.

To add a Review Reason, right click anywhere in the grid and select **Add**.

The screenshot shows the 'Review Reason Add' dialog box. It includes fields for 'Review Reason' and 'Review Description', a section for 'Account' with three levels of hierarchy, 'Category Code', 'Days' (set to 0), and 'Object Code' (set to 'ITEM'). There are 'Add' and 'Cancel' buttons at the bottom.

Review Reason: This field, unlike other O'Neil Stratus codes, has to be unique only within an Account. Since Review Reasons are specific to Accounts, you can have the same Review Reason and Description for more than one Account. Use this field to identify the Review Reason in just a few characters for use in scheduling events.

Review Description: Use this field to describe the Review Reason more completely. This text becomes the descriptive part of the Retention Schedule.

Account: Review Reasons are established on an Account by Account basis. This is the Account that uses this Review Reason for items falling under the following Category. Click the grid picker to select the Account for whom you are creating a Review Reason.

Category Code: When the User selects the Category for an item, O'Neil Stratus finds all Review Reasons for the Account owning the item and having the entered Category Code, and applies these Review Reasons to calculate a Review Date. Click the grid picker to select from the available Category Codes.

Days: The number of days from the To Date (in the item's description) until the Review is scheduled to take place. For example, if you enter 365, the system calculates the Review Date to be one year from the ending date shown in the Date Range of the **Container** dialog.

Object Code: Use this field to select the object type for the review reason. You can select Container, Filefolder, Tape, or Item (which applies to all three object types). Click the grid picker to select from the available Object Codes.

Example:

The SSIA keeps Personnel files for 10 years from each employee's termination date. But they also want to review the files after the first year, and again after the fifth. To create the appropriate Retention Schedule, you would need to set up three Review Reasons for the SSIA's Personnel files. The first would be entered as shown:

Review Reason Add

Review Reason	YEAR1
Review Description	First Review
Account	
Level 1	SSIA
Level 2	
Level 3	
Category Code	PERS-01
Days	0
Object Code	CONTAINER
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

The second might have a Review Description of Five-Year Review, and would show 1825 days (five years). The third would reflect the 10-year destruction date.

When you look up one of the SSIA's containers that holds personnel files, you would be able to access a Review Date Schedule that looks like this:

Scheduling for 134601

Scheduling for 134601									
		Item Code	Review Date	Review Time	Description	Apply Charge	Perm ...	Type Actio...	Workorder ...
1	134601	4/21/2003	12:00 AM	First Review	Yes	No		2000	
2	134601	4/20/2007	12:00 AM	5-Year Review	Yes	No		2000	
3	134601	4/21/2008	12:00 AM	Year 10 - Destruction	Yes	No	DESTROY	2000	

The dates are calculated from the Date Range established in the **Container Edit** dialog. If no Date Range is entered for a Container belonging to the SSIA that has Personnel files in it, no Review Date is calculated.

Invoice Cycle

O'Neil Stratus allows you to assign an Invoice Cycle to each account. The Invoice Cycle is one obvious way for you to group accounts for invoicing. Once you set up your Invoice Cycles, you can then assign them to accounts.

You can set up accounts to have different billing cycles, say for the 1st and 15th of the month. Doing this enables you to avoid the “First of the Month Crunch.” Or using an Invoice Cycle of, say, “ADV01 - Monthly In Advance,” you can load just those accounts that require advanced monthly billing, and create their invoices separately from those who are billed monthly in arrears.

The Invoice Cycle doesn't have to represent a period of time. Say, for example, that you have a number of accounts with state government offices. Each of these accounts' invoices needs special attention, so you want to pull them all together and print them out at the same time. You can assign them all an Invoice Cycle of STGOV, sort your accounts, and invoice these accounts all at one time.

To create Invoice Cycles from the **Administration** menu, **Setup** submenu, select **Invoice Cycle**. From the **Invoice Cycle** grid, you can load existing invoice cycles onto the grid for viewing or review. To add a new Invoice Cycle, right click anywhere in the grid and select **Add**.

The dialog box is titled "Invoice Cycle Add". It contains two input fields: "Invoice Cycle Code" and "Invoice Cycle Description". Below the fields are two buttons: "Add" and "Cancel".

Each Invoice Cycle consists of a user defined Invoice Cycle code and description.

Security Level

Item Security Levels can be assigned to both users and items to ensure that unauthorized personnel do not have access to secured items. An Item Security Level assigned to an item must be less than or equal to a User's Security Level in order for that user to access that item. Upon log in, the system notes the user entering the system and immediately determines what security level access that user has within the system.

When objects enter the facility by way of RSMobile/O’Neil Mobile scanner, they are not automatically given a Security Level. Not having a Security Level is equivalent to a Security Level of 00 -- minimum security. The item Security Level can be changed through in the **Container**, **Filefolder** or **Tape** grids during data entry.

When users are added to the system and given a password, a Security Level must be entered to represent their level of access.

To add, edit, or delete a Security Level, from the **Administration** menu, **Setup** submenu, select **Security Level**. To add a new Security Level, right click anywhere in the grid and select **Add**.

The dialog box is titled "Security Add". It contains two input fields: "Security Code" and "Security Description". Below the fields are two buttons: "Add" and "Cancel".

Each Security Level consists of a user defined Code and Description. As you set them up and fill in their descriptions, keep in mind that these levels will be assigned to users as well as objects.

As time goes by, you may find that you need to add more Security Levels. Keeping this in mind, you will want to allow space between Security Levels to add more if needed. Don't assign a large number of high Security Levels unless they are really needed. If you use the top levels first, you may block yourself out of the highest numbers when you need them. We suggest that you determine the number of Security Levels you need right now and assign them well-spaced numbers. For example you may decide to start with five levels, and set them up as 00, 25, 50, 75 and 99. Don't use level 99 unless you really need it, since no user or item can ever have a higher Security Level.

NOTE: If a user cannot find an item in the system while others can (in particular, the system administrator with Security Level of 99), be sure the user has an adequate Security Level to access the item.

Objects

An Object is a thing that is part of the records management business environment and is readily understood by someone familiar with that environment. It is, along with Actions, the most fundamental building block in O'Neil Stratus.

The system is delivered with several standard Objects. O'Neil Stratus does not allow you to add to, or subtract from, this core set of Objects, but you may modify the descriptive text associated with each Object, and you may create sublists for some Objects.

There are some Objects that cannot be defined by a single title. For example, it is insufficient to use just a simple 'Container' object. You use Containers of various shapes and sizes, and they can be defined through Object Sublists. You can create sublists for Containers, Tapes and Materials.

The Objects included with O'Neil Stratus are Client, Container, Filefolder, Item, Location, Material, Tape, and User.

Client

A Customer.

Container

An object for holding client property, e.g., a box. This Object has a sublist, but O'Neil Stratus does not supply any Objects in that list. You can add container descriptions to meet your own facility's requirements.

Filefolder

A filefolder.

Location

A place where containers, filefolders and tapes are stored.

Material

Something that can be sold to a customer. This Object also has a sublist in which you can define the Objects that your facility sells to its clients.

NOTE: If you have customers accessing your database through RSWeb.NET/O'Neil Order, it is possible that you do not want every Material that you have listed here available for them to choose from. Each Material offers an option whether it is Public or not. A Material item that is specified as Public is a visible option for your RSWeb.NET/O'Neil Order customers. If it is specified as Not Public, it is only available to non-RSWeb.NET/O'Neil Order users.

User

A person given permission to use the system.

Tape

Backups of your customers' computer systems. You keep them safe and rotate them back to the customer on scheduled days.

Item

Something you store in your facility. This definition encompasses Containers, Container sub-objects, Filefolders, Tapes, Tape sub-objects. See the section below for more details on how to use this Object.

Mobile Materials List

When added to a workorder, materials can be downloaded to the RSMobile/O'Neil Mobile scanner. Sales of materials can also be generated from the RSMobile/O'Neil Mobile scanner at a customer site. Only materials that have been identified and added to a special list in O'Neil Stratus are available for download to RSMobile/O'Neil Mobile. If you do not create a list, no materials will be downloaded and the menu option will not display in RSMobile/O'Neil Mobile. The list can be created in the **Object** grid.

From the **Administration** menu, **Setup** submenu, select **Object**. The **Object** grid appears. In the **Object** grid, right click on **Material** and select **Sublist**. The sublist of materials displays.

Record Storage Material Object				
	Object Code	Object Description	Public	
1	1 CUBE	1 Cube	Yes	
2	1 CUBE LID	1 Cube Lids	No	
3	2 CUBE	2 Cube	No	
4	2 CUBE LID	2 Cube Lids	No	
5	3 CUBE	3 Cube	No	
6	3 CUBE LID	3 Cube Lids	No	
7	BARCODES	Barcode Labels	No	
8	CHECK T...	Check Transfer Box	No	
9	CHECK_B...	Check Box	No	
10	FILE BOX	Standard Storage Box	No	
11	LARGE B...	Large Storage Box	No	
12	MTXRAY	Empty X-Ray Boxes	No	
13	TAPE BOX	Tape Storage Box	No	
14	TRTLE T...	Turtle Tote	No	

Mark the items you want included on the list. From the **Options** menu, select **Mobile Materials List**, and then **Save** to save the list. From the **Options** menu, you can also load or delete an existing list.

Add/Edit Objects

As mentioned previously, the Objects that are pre-established in O'Neil Stratus cannot be deleted. They can, however, be edited, and new sub-objects can be added.

Add New Objects

To add a new sub-object, right click on the Object and select **Sublist**. The list of sub-objects appears.

Record Storage Container Object					
	Object Code	Object Description	Unit Volume	Public	
1	1.2 BOX	1.2 Cu Ft Container	1.2000000000	No	
2	ARCHIVE	One Cube	0.0000000000	No	
3	BOX-CT	Box-Check Transfer	0.0000000000	No	
4	BOX-HIS...	Box-High Security	0.0000000000	No	
5	BOX-STD	Box-Standard File	0.0000000000	No	
6	BOX-TP	Box-Tape Storage	0.0000000000	No	
7	CHECK B...	Check Box	0.0000000000	No	
8	DRAWING	Drawing Tube	0.0000000000	No	
9	THREE C...	Three Cube	2.0000000000	No	
10	TWO CUBE	Two Cube	1.0000000000	No	
11	XRAY	X-Ray Box	0.0000000000	No	

To add a new sub-object, right click anywhere in the grid and select **Add**. The **Object Add** dialog box appears.

Object Add

Object Code	<input type="text"/>
Object Description	<input type="text"/>
Unit Volume	<input type="text" value="0.0000000000"/> ↑ ↓
Public	<input type="button" value="No"/> ▼
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

Object Code: Enter a short code for the object. No two sub-objects can share the same code.

Object Description: Enter a description for the object.

Unit Volume: If the object is an item, container, filefolder, tape, or a subtype of any of these, you can specify a Unit Volume for the object. For all other object types, the Unit Volume field is hidden. For volume billing to apply, the Unit Volume value for the object must be greater than zero.

Public: Select whether the object is to be Public or not. When public is set to Yes, web users can view the object when logged into RSWeb.NET/O'Neil Order. The default is No.

Click **Add** to add the new sub-object.

Edit Existing Objects

To edit an existing object, right click on it and select **Edit**.

Object Code	CONTAINER
Object Description	Container
Unit Volume	0.0000000000
Public	Yes

Edit **Cancel**

You can edit the Object Description, but not the Object Code. You can also edit the Unit Volume and Public fields. Click **Edit** to save your changes. The changes appear in the **Object** grid.

Item

The Object "Item" encompasses all items that are stored in the record center. This could be containers, container subtypes, tapes, tape subtypes, and filefolders. Item is used as the Object associated with Actions to create Transactions when you want to establish pricing for an Action, regardless of the item involved.

For example, you could create a transaction for the Delivery of each type of container in your facility, the Delivery of each type of tape, and you could also create a transaction for the Delivery of filefolders. This could add up to several transactions. Or, if the price of delivering all those items is the same, you could just set up one transaction for delivering Items. This transaction would be used whenever anything is delivered.

Going one step further, offering quantity breaks to your customers can be much easier when you use Item as your Object. If you deliver seven small containers and eight large containers, your customer can receive quantity discounts for a delivery of 15 items, instead of two separate deliveries of seven and eight (see Transactions / Quantity Breaks).

Actions

Actions represent things that happen in the Record Storage facility. They are pre-established in the system and include Store, Sell, Service, Priority Services, Minimum Charge, Surcharge, Other Services, Charges/Credits, Move, Recurring Service, Status Change, Tracking, Validate, Exchange Rate, Workorder Override and System. Each of these Actions is described in full below. O'Neil Stratus does not allow you to add to or subtract from this core set of Actions, but you may modify the descriptive text associated with each Action, and you may create and/or edit Sublists for some Actions.

There are some Actions that cannot be defined by a single title. For example, it is insufficient to charge for something called simply 'Service.' You perform services of various types for your customers, and they can be properly defined through Action Sublists. O'Neil Stratus allows you to create Sublists for Services, Priority Services, Minimum Charge, Surcharge, Other Services, Recurring Services, and Validating.

The following Actions and Sub-Actions are included in the system:

Store

This is the Action that defines what is happening to all of your customers' items when they are just sitting on the shelf.

Sell

Your main business is storage, but you do this too. This Action encompasses all Materials that you sell to your customers.

Service

This is what's done to boxes, filefolders, tapes, etc. when they're not sitting on a shelf. O'Neil Stratus includes a sublist of services that include:

Access: When your client comes to your facility, and you make a pulled item available to him.

Add: When a new container or other item is added to the system for storage.

Content Val: When an item is content validated.

Delivery: When you deliver your client's goods to him.

Destroy: When an item is no longer needed and it needs to be Destroyed.

Image: This action is used when creating an image of a document.

Inventory: When an item is scanned to a location and is not an add, refile, or move.

Pending: When an item is added or imported and its physical existence has not yet been confirmed by the record center.

Permanent Out: When your client wants an item, and doesn't plan on ever returning it.

Pickup: When you go to the client's facility to pick up items.

Pull: When you take items out of storage.

Receive: When an item is delivered to your facility by a client.

Refile: When an item is returned to a location after being accessed for an account.

You may add other services to the Service sublist, or edit the Descriptions, but you may not delete any of the pre-defined Services from the system.

Priority

When you go out of your way to ensure that the client gets what he wants when he wants it.

There is a sublist available for this Action, but there are no pre-defined priority items included. This is for you to set up as your environment determines. Priority actions generally emphasize degrees of urgency.

Minimum Charge

This Action is applied, when you invoice, to the invoice section that it is attached to. You may have a Minimum Storage Charge, a Minimum Delivery Charge, etc.

The system includes standard Minimum Charges that are attached by default to invoice items: Minimum Storage Charge, Minimum Invoice Charge, Invoice Minimum Charge Before Tax, Minimum Pickup/Delivery Charge, and Minimum Workorder Charge.

You may edit the descriptions of these Actions, or add more Minimum Charges, but you may not delete any of the pre-defined Minimum Charges from the system. Should you choose to add a minimum charge, be aware that none of the supplied invoice definition files will recognize it or charge for it. To incorporate a new Minimum Charge into your invoicing, please contact O'Neil Technical Support for information on custom invoices.

Surcharge

The Surcharge Action is a percentage that is applied to another charge. For example, taxes are Surcharges. The system includes a subset that includes taxes for Sales, Storage, Services, Invoices, and E-Storage. You may edit the descriptions of these taxes, or add more surcharges, but you may not delete any of them.

NOTE: When you create new surcharges in the surcharge subset, O'Neil Stratus pre-defined invoices do not recognize them, and they do not automatically appear on invoices. If you need to charge for surcharges other than the pre-defined taxes, contact O'Neil Technical Support for information on custom invoices.

Other Services

Other Services are pretty much anything else you want to charge for. O'Neil Stratus includes Labor, but you may add anything else your environment dictates. Common Other Services include copying, and faxing.

NOTE: If you have customers accessing your database through RSWeb.NET/O'Neil Order, it is possible that you do not want every Other Service to be available for them to choose from. Each Other Service offers an option whether it is Public or not. An Other Service that is specified as Public is a visible option for your RSWeb.NET/O'Neil Order customers. If it is specified as Not Public, it is only available to non-RSWeb.NET/O'Neil Order users.

Report

This action provides reports for your RSWeb.NET/O'Neil Order users. Report options vary depending on the report chosen.

NOTE: The default Public setting for all reports is No. If you want to make a report available to your RSWeb.NET/O'Neil Order users, change the Public field to Yes and set up Report Profiles. Without report profiles set up, the web report will be blank. For more detailed information, see the *Security/User Access and Reporting* chapters.

Charges/Credits

There will always be custom adjustments required on invoices. This action can be accessed to accommodate them.

Move

The inevitable shifting about of boxes in the storage center. This action is just there as a name for movements within the record center. These may or may not be charged for.

Recurring Services

Recurring Services show on every invoice for the account for which they are established. The system offers a subset grid for this action, where you can name and describe your own Recurring Services.

Status Change

Used to keep track of any direct edits of location or status made to Containers, Filefolders or Tapes.

Tracking

Similar to storage, but limited to containers/filefolders/tapes that have been identified to O'Neil Stratus, and have the Charge for Storage flag set to No. Tracking is determined solely by the Charge for Storage flag. When the Charge for Storage flag is set to Yes, it is considered Storage, otherwise it is considered Tracking.

By default the Charge for Storage flag is set automatically: if the file/tape is in a container, Charge for Storage is set to No; if the file/tape is "loose on the shelf", the Charge for Storage flag is set to Yes; containers always

have the Charge for Storage flag set to Yes. However, you can choose to set the Charge for Storage flag manually.

Validate

This Action is associated with the use of the RSMobile/O'Neil Mobile scanner to ensure that requested work, such as the delivery of a box to a customer, has actually been done. The sublist includes all validations currently available.

Access_Val: Validates that the item was accessed by the customer

Deliv_Val: Validates that the item was delivered to the customer

Destr_Val: Validates that the item was destroyed

Docins_Val: Validates that the document was inserted into a container or filefolder

Pick_Val: Validates that the item to be delivered was picked from the shelf

Pickup_Val: Validates that the item was picked up from the customer

Recv_Val: Validates that the item was received from the customer

Truck_Val: Validates that the item was placed on the truck

System

This action is used only when you are exporting invoice data to a third-party accounting package. Its sublist includes Invoice and Invoice Discount. These actions combined with the object 'Client' allow you to export data into your chart of accounts. For more information on exporting invoice information, see *Financial Info Export*.

Invoice: This indicates the invoice total.

Invoice Discount: This represents the discount applied on an invoice as set up in Account Billing Information.

Workorder Override

This action is added to the activity file when you choose the "Override Workorder" option in the **Workorder** dialog box.

Exchange Rate

This action is used mostly in European countries where the Euro Exchange Rate must appear on international invoices.

Mobile Services List

When added to a workorder, services can be downloaded to the RSMobile/O'Neil Mobile scanner. Sales of services can also be generated from the RSMobile/O'Neil Mobile scanner at a customer site. Only services that have been identified and added to a special list in O'Neil Stratus are available for download to RSMobile/O'Neil Mobile. If you do not create a list, no services will be downloaded and the menu option will not display in RSMobile/O'Neil Mobile. The list can be created in the **Action** grid.

From the **Administration** menu, **Setup** submenu, select **Action**. The **Action** grid appears. In the **Action** grid, right click on **OtherServi** and select **Sublist**. The sublist of Other Services displays.

Record Storage Other Service Action				
Options Search Format Mark Clear				
	Action Code	Action Description	Public	
1	FAX	Fax Per Page	Yes	
2	IN-RESEA...	Item in-research	Yes	
3	LABOR	Labor	Yes	
4	NF	Item Not Found	No	
5	PHOTOC...	Photocopy	Yes	
6	REPAC	Repac	Yes	
7	WAIT	Wait Time Regular	No	
8	WAITX2	Wait Time Over Time	No	

Mark the items you want included on the list. From the **Options** menu, select **Mobile Services List**, and then **Save** to save the list. From the **Options** menu, you can also load or delete an existing list.

Mobile Wait Time List

A separate Wait Time list is available so that you can include only those items having to do with wait time. This eliminates the need to scroll through the entire list of services when using the Wait Time feature in RSMobile/O'Neil Mobile.

From the **Administration** menu, **Setup** submenu, select **Action**. The **Action** grid appears. In the **Action** grid, right click on **OtherServi** and select **Sublist**. The sublist of Other Services displays.

Record Storage Other Service Action				
Options Search Format Mark Clear				
	Action Code	Action Description	Public	
1	FAX	Fax Per Page	Yes	
2	IN-RESEA...	Item in-research	Yes	
3	LABOR	Labor	Yes	
4	NF	Item Not Found	No	
5	PHOTOC...	Photocopy	Yes	
6	REPAC	Repac	Yes	
7	WAIT	Wait Time Regular	No	
8	WAITX2	Wait Time Over Time	No	

Mark the items you want included on the list. From the **Options** menu, select **Mobile Wait Time List**, and then **Save** to save the list. From the **Options** menu, you can also load or delete an existing wait time list.

Set Up/Edit Actions

As mentioned previously, the Actions that are pre-established in O'Neil Stratus cannot be deleted. They can, however, be edited, and new sub-actions can be added.

Add New Actions

To add a new sub-action, right click on the Action and click **Sublist**. The list of sub-actions appears.

Record Storage Priority Action			
	Action Code	Action Description	Public
1	2 HOUR	2 Hour Rush	Yes
2	2 HOUR_...	2 Hour Rush Pull	Yes
3	2HR_RUSH	2 hour rush	Yes
4	3 HOUR	3 Hour Rush	Yes
5	3 HOUR_...	3 Hour Rush Delivery	Yes
6	3 HOUR_...	3 hour rush pull	Yes
7	AFTER H...	After Hours	Yes
8	STANDARD	Standard Service	Yes
9	STAT	Stat Delivery	Yes

To add a new sub-action, right click anywhere in the grid and select **Add**. The **Action Add** dialog appears.

Action Add

Action Code	<input type="text"/>
Action Description	<input type="text"/>
Public	<input type="button" value="No"/>
Posted Priority	<input type="button" value="No"/>
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

Action Code: Enter a short code for the action. No two sub-actions can share the same code.

Action Description: Enter a description for the action.

Public: Select whether the action is to be Public or not. When public is set to yes, web users can view the action when logged into RSWeb.NET/O'Neil Order. The default is No.

Posted Priority: This field is only available for actions in the sublist of the base action PRIORITYSE. A priority action with its Posted Priority flag set to No can be assigned to a workorder. These are referred to as Workorder Priorities. A priority action with its Posted Priority flag set to Yes is referred to as a Posted Priority

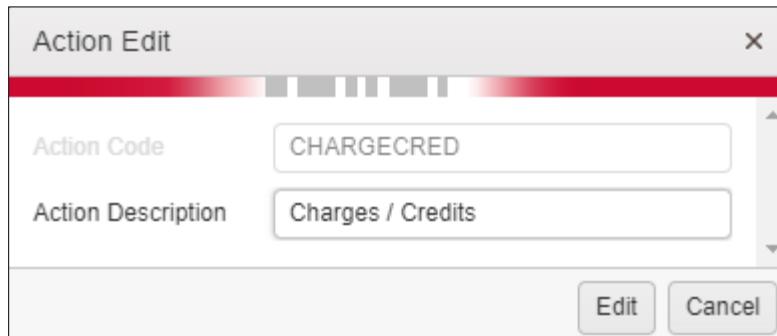
and cannot be assigned to a workorder. Posted Priorities can be applied as a priority to each action of an activity set on a workorder. The default is No.

NOTE: If Posted Priority is set to Yes and you do not have any Enhanced Priority Services set up, make sure you set Public to No so the action is not available for selection in the Service Priority field in RSWeb.NET/O'Neil Order.

Click **Add** to add the new sub-action.

Edit Existing Actions

To edit an existing action, right click on it and select **Edit**.



You can edit the Action Description, but not the Action Code. Click **Edit** to save your changes. The changes appear in the **Action** grid.

Authorized Lists

It is generally a good security precaution for both your company and your clients to establish a list of authorized contacts for each Account. An authorized person has the authority, given by the customer, to order goods and services. The Authorized List is accessed through the **Workorder** dialog box, so your data entry personnel can check it while creating a workorder.

You can set the system to force the entry of an authorized name and password when a workorder is being generated.

To set up an Authorized List, from the **Administration** menu, select **Setup** and then **Authorized List**. To add a new authorized customer, right click anywhere in the **Authorized List** grid and select **Add**.

Authorized List Add

Level 1	<input type="text"/>	<input type="button" value="grid icon"/>
Level 2	<input type="text"/>	<input type="button" value="grid icon"/>
Level 3	<input type="text"/>	<input type="button" value="grid icon"/>
Last Name	<input type="text"/>	
First Name	<input type="text"/>	
Password	<input type="text"/>	
Phone	<input type="text"/>	
Email Address	<input type="text"/>	
Inactive	<input type="button" value="No"/>	
Notes	<input type="text"/>	

Add Cancel

Account

Be sure to enter the full Account, including all Levels, to which you are adding an authorized person. If you want an individual to appear in a Level 1 Account and all of its Level 2 Accounts, you must explicitly add the authorized person to each Account.

NOTE: When a Level 2 Account's containers and filefolders are open to access by its Level 1 Account, the Authorization Lists are not shared. This is because if the Level 1 Account authorized person is accessing Level 2's containers, they are being placed on a Level 1 workorder. To create a workorder for Level 2, you must be on Level 2's Authorization List.

Password

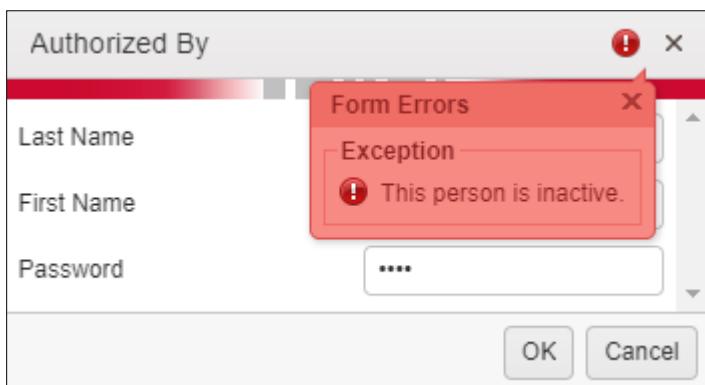
After you have entered the first and last name of a person allowed to order goods and services, enter a Password. We recommend that each authorized person have a unique Password that only he knows. If a client were to establish a Password for each department, he would have to change it whenever a person left the company or department. We also recommend that you only accept changes to the list in writing.

Phone/Email Address

Phone and Email Address fields are optional.

Inactive

The Inactive field is used to determine if an authorized person is no longer active. If the Inactive field is set to Yes for an authorized person, when that person is selected while creating a workorder, the following message appears.



By default the Inactive field is set to No.

Notes

Notes can be added for an authorized person. When creating a workorder, if you select an authorized person for which notes exist, the notes display.

The following are some examples of the type of notes that you might find useful:

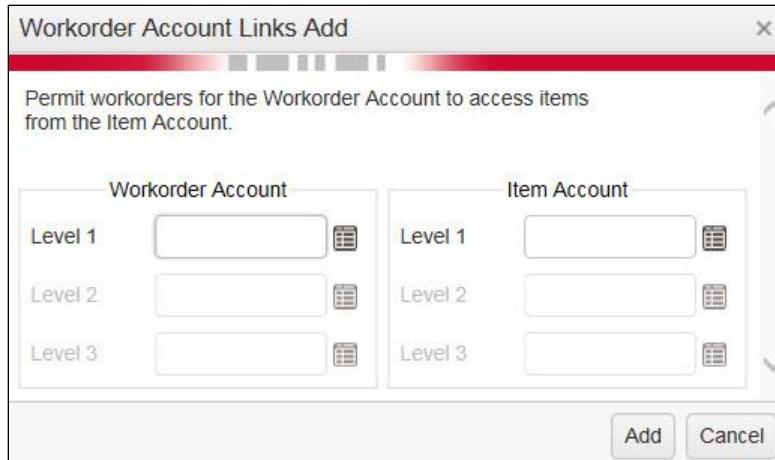
- Which services the person is authorized to request
- Which priorities the person is authorized to request

When you have completed all fields, click **Save**. The person is added to the grid and you can continue adding any additional people. When you have finished, click **Cancel** to return to the grid.

Workorder Account Links

O'Neil Stratus offers flexibility in the way an account can access information from other accounts. In *Account Set Up* chapter we discuss how an account can have three levels, and the lower levels can be open to access from the higher level accounts. Through the **Workorder Account Links** option, you can give any level of one account access to the items assigned to any level of another account.

From the **Administration** menu, **Setup** submenu, select **Workorder Account Links**. The **Workorder Account Links** grid appears. To add a new link, right click anywhere in the grid and select **Add**. The **Workorder Account Links Add** dialog box appears.



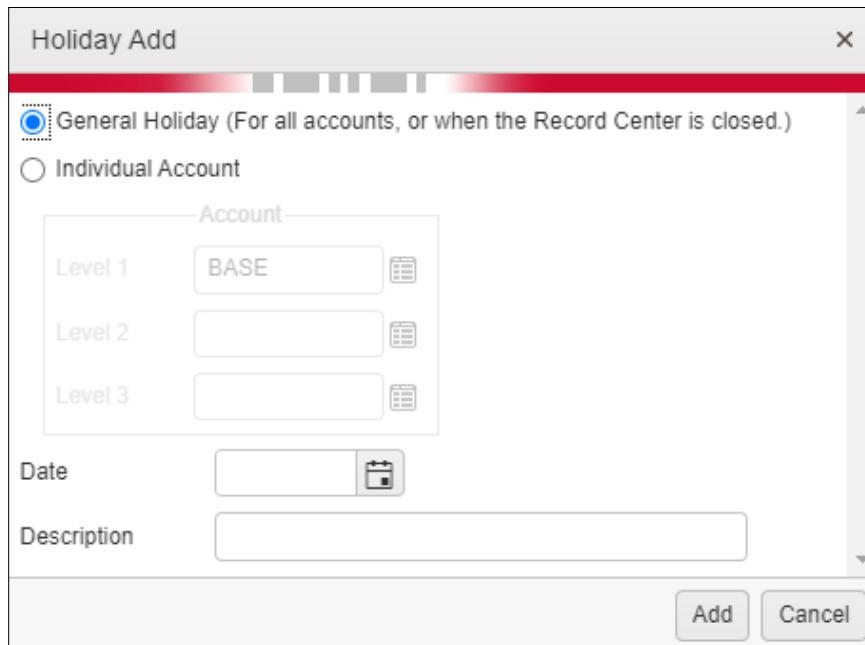
For detailed information and examples, please see the Account Links section of the *Workorders* chapter.

Holiday

Most companies shut down for a certain number of holidays each year. Your own record center probably does, and certainly most of your customers do. O'Neil Stratus allows you to create holiday schedules for individual customers, and for across-the-board holidays (those in which the record center itself is closed). Setting up proper holiday schedules eliminates the risk of inadvertently scheduling deliveries for days that either you or your customer is closed.

General Holidays

We recommend that you first establish your record center's holidays. Let's say you are closed on Sundays, Christmas Day and Thanksgiving Day. From the **Administration** menu, **Setup** submenu, select **Holiday**. The **Holiday** grid appears. Right click anywhere in the grid and select **Add**. The **Holiday Add** dialog box appears.



General Holiday: When selected, the holiday applies to all accounts. You would use this to indicate holidays when your record center is closed.

Individual Account: Select this option if one of your customer observes holidays that you don't. You are required to enter an account. You can clone holidays from one account to one or more other accounts through the **Account** grid.

Account: The account fields determine if this holiday is a general, system-wide holiday (when the center is closed) or just for one account. When General Holiday is selected, the Level 1 Account shows Base and the field is grayed out. When Individual Account is selected, you must enter the Account.

Date: Click the date picker to select the date of the holiday.

Description: Enter a description for the holiday.

Click **Add** to save the holiday.

Each year you will need to update your holiday schedule. Keep in mind that some holidays, like Christmas, fall on the same day every year, so you can edit the holiday and just change the year. However, other holidays, like Thanksgiving, fall on a different day every year. Therefore, you must check your calendar for each year that you want to establish this holiday. We recommend that you create your own follow-up flag to ensure that your holiday schedules don't run out.

Data Collection Device

See the *RSMobile Setup* chapter for more background information on this menu option.

From the **Administration** menu, **Setup** submenu, select **Data Collection Device**. The **Data Collection Device** grid appears with all existing devices displayed.

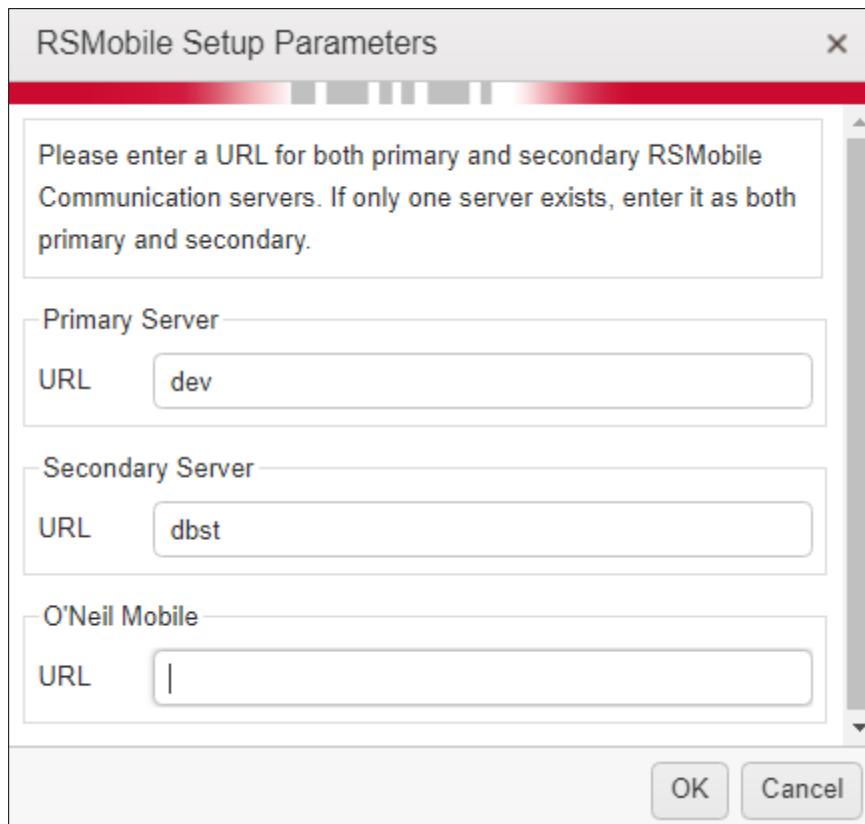
Record Storage Data Collection Device									
	Options	Search	List	Format	Mark	Clear			
1	RSMobile	ES400_03	001346996...	D49BD9...	78138D321...	English	Yes		
2	RSMobile	MC50	20934502B...	0000000...	39138A041...	English	No	00-0E	
3	RSMobile	MC75	00195B2FF...	3A37030...	7907B75E9...	English	No		
4	RSMobile	PDT_CATHIE	A1D237E59...	73513FB...	3A906ECA...	English	No	00-AC	
5	RSMobile	PDT_CSM	A1B6E08FA...	0000000...	3A58C01FA...	English	No		
6	RSMobile	RS_12	00195B2FF...	33360D1...	7907B75E9...	English	No		
7	RSMobile	RS_15	E1481875F...	E2607AB...	BBA431EA...	English	No		
8	RSMobile	RS_16	58000050B...	1E00070...	C93501A0A...	English	No		
9	RSMobile	TheX3	E1481875F...	0000000...	BBA431EA...	English	No		

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NOTE: RSMobile licenses restrict the number of RSMobile scanners you can add and register.

RSMobile Setup Parameters

Before you can initialize any devices, you need to set up the RSMobile Communication Server. From the **Options** menu, select **RSMobile Setup Parameters**.



Primary Server URL: Enter the web address or computer name of the RSMobile Communication Server.

Secondary Server URL: Enter the URL for the secondary RSMobile Communication server. If you only have one server, enter it as both primary and secondary.

O'Neil Mobile URL: Enter the URL for O'Neil Mobile communications. This information is automatically conveyed to O'Neil Mobile devices (optional). O'Neil Mobile will contact the URL that it is aware of, and then retrieve/save/use the new preferred URL that is current in the O'Neil Stratus database.

Click **OK** to return to the **Data Collection Device** grid. If the secondary server field is left blank, when you click **OK** it is automatically set the same as the primary.

Once you have set up the servers, you can now initialize devices.

Create RAD File

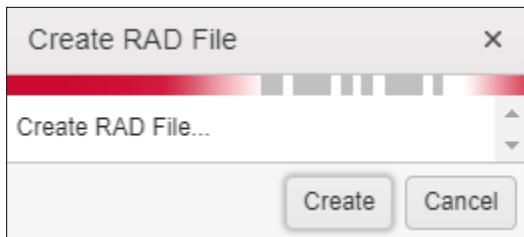
NOTE: This menu option is used to create a RAD file, which is used along with the RSMobile Initialization Operations (RIO) program for scanner initialization. For more information on RIO and the entire process, see the Remote Initialization section of the *RSMobile Setup* chapter.

The RSMobile Application Data (RAD) file contains an XML representation of all O'Neil Stratus database data required by the RSMobile initialization process. This includes Strings, Users, Barcode Lengths, Objects, Urgent Items, URL information, etc. The RAD file also contains all information about all RSMobile devices in the database. This is the data that normally appears in the **Data Collection Device** grid, such as the UnitID, RegistrationID, Device Name, Active Status, etc. Additionally, the file contains information about itself, such as creation date/time and user, and the O'Neil Stratus version that created the file.

This file has a fixed name of RSMobileApplicationData.xml. The RIO program expects the RAD file to be found in the Common Files root folder. The RSMobile password data is encrypted in the RAD file, but all other data is unencrypted.

NOTE: The user who creates the RAD file must have Account Access set to *All by Default* with no exclusions and must have Item Security Code set to 99.

In the **Data Collection Device** grid, from the **Options** menu, select **Create RAD File**.



Click **Create** to continue.

You are prompted for the destination location in which to save the RAD file, though the file name itself will always be RSMobileApplicationData.xml.

NOTE: It doesn't matter where you save the file when it is initially created. However, it needs to be placed in the Common Files folder that will be accessed by the computers that will be doing initialization.

The O'Neil Stratus database is queried and all required data is formatted and placed into the file. The creation date/time and user name is placed into the file, as well as the O'Neil Stratus version number. When the file has been successfully created, you are returned to the **Data Collection Device** grid.

Depending on the amount of data involved, RAD file creation should take anywhere from a few seconds to a minute or so. The RAD file is then ready to be used by the RIO program.

The RAD file can be copied to any number of locations and computers and can be used to initialize any number of devices. The main concern with the RAD file is that its contents remain fairly current. Of course, the first RSMobile communication will synchronize the data, but you are encouraged to use reasonably fresh RAD files.

Create RIO Installer

The Create RIO Installer feature lets you create all the files needed for RSMobile scanner initialization. Once created, you can use the RIO program to initialize your scanners.

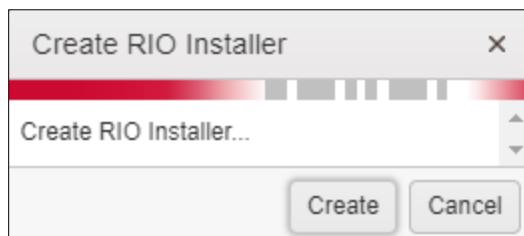
The RIOStandaloneInstaller.msi file that is created is a Windows Installer file that contains everything the remote site needs. Double clicking on the file runs the installer that installs the following.

- RIO executable program
- RAD file with O'Neil Stratus data from the time the .msi file was created
- Common files from the time the .msi file was created

From the **Administration** menu, **Setup** submenu, select **Data Collection Device**. The **Data Collection Device** grid appears with all existing devices displayed.

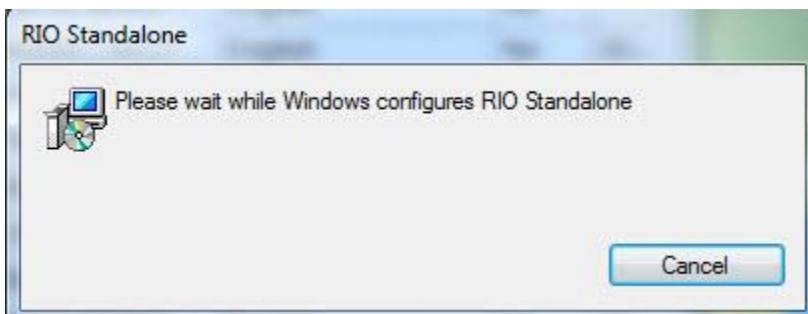
Record Storage Data Collection Device								
Options Search List Format Mark Clear								
	Dump Device	Device Name	Unique Unit ID	Platform ID	Registration ID	Default Lang...	Active	MAC
1	RSMobile	ES400_03	001346996...	D49BD9...	78138D321...	English	Yes	00-0E
2	RSMobile	MC50	20934502B...	0000000...	39138A041...	English	No	00-AC
3	RSMobile	MC75	00195B2F...	3A37030...	7907B75E9...	English	No	
4	RSMobile	PDT_CATHIE	A1D237E59...	73513FB...	3A906ECA...	English	No	00-AC
5	RSMobile	PDT_CSM	A1B6E08FA...	0000000...	3A58C01FA...	English	No	
6	RSMobile	RS_12	00195B2FF...	33360D1...	7907B75E9...	English	No	
7	RSMobile	RS_15	E1481875F...	E2607AB...	BBA431EA...	English	No	
8	RSMobile	RS_16	58000050B...	1E00070...	C93501A0A...	English	No	
9	RSMobile	TheX3	E1481875F...	0000000...	BBA431EA...	English	No	
10	RSMobile	Tl_PDT	114820027	7851070...	3B0214000...	English	..	00-AC

From the **Options** menu select **Create RIO Installer**.



Click **Create** and the RIOCloudInstaller.msi file is created.

You are prompted for the destination location in which to save and run the file. A message appears while it is being configured.



The RIO program is installed, and the RAD file and common files are copied to the appropriate place. When finished, the RSMobile Initialization Operations program opens and you can initialize your scanners.



NOTE: A RIO Standalone shortcut is added under **Programs** in the Windows **Start** menu for future use.

Add a New Device

To add a new device, right click anywhere in the **Data Collection Device** grid and select **Add**. The **Data Collection Device Add** dialog appears.

Device Name	
Unique Unit ID	
Platform ID	
Registration ID	
Serial Number	
Device Model	
Default Language	ENGLISH <input style="width: 20px; height: 20px;" type="button" value="..."/>
Active	Yes <input style="width: 20px; height: 20px;" type="button" value="▼"/>
Allow Custom Scan	Yes <input style="width: 20px; height: 20px;" type="button" value="▼"/>
Ad Hoc Communications	
<input checked="" type="checkbox"/> Disabled	
Mac Address	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<input type="button" value="Get IP Address"/>	
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

Device Name: Give the device a unique name. Any name entered here overwrites the Device Name that may have already been entered on the RSMobile scanner itself.

Unique Unit ID: The Unique Unit ID is burned into the device at the factory. It can be found using the RSMobile scanner menu option **Start** and then **Settings**. Select the **System** tab and then select **Symbol Settings**. Select the **System** tab to display the information. The list below shows where the UUID information is found for each scanner type.

RSMobile Scanner	Unique Unit ID
PDT8100 1D, 2D B/W Laser	UUID Part 2
PDT8100 2D Imager	UUID Part 2
PPT8800	UUID Part 2
MC50	First 16 characters of Device ID in Byte Format
MC55	UUID Part 1
MC70	UUID Part 1
MC9060	First 16 characters of Device ID in Byte Format
MC909X	UUID Part 1
MC95XX	UUID Part 1
MC9190	UUID Part 1
ES400	UUID Part 1

Platform ID: The Platform ID is burned into the device at the factory. It can be found using the RSMobile scanner menu option **Start** and then **Settings**. Select the **System** tab and then select **Symbol Settings**. Select the **System** tab to display the information. The list below shows where the Platform ID information is found for each scanner type.

RSMobile Scanner	Platform ID
PDT8100 1D, 2D B/W Laser	UUID Part 1
PDT8100 2D Imager	UUID Part 1
PPT8800	UUID Part 1
MC50	Last 16 characters of Device ID in Byte Format
MC55	UUID Part 2
MC70	UUID Part 2
MC9060	Last 16 characters of Device ID in Byte Format
MC909X	UUID Part 2
MC95XX	UUID Part 2
MC9190	UUID Part 2
ES400	UUID Part 2

Registration ID: The Registration ID must be obtained through O'Neil Technical Support.

Serial Number: The serial number on some of the newer scanners can be automatically pulled from the device when it is cradled. For older scanners, the serial number will need to be manually entered.

Device Model: Enter the model number of the device (optional).

Default Language: Click the grid picker to select from the list of available languages. Note: this is just the default language. User languages are based on the user currently logged into RSMobile.

Active: Select whether the device is active or not.

Allow Custom Scan: This field is only for customers who are using a custom scanning module (RSCECustomProcessing.dll). It allows you to turn off custom scanning, even if the custom .dll exists. The default value is Yes.

Ad Hoc Communications: All RSMobile scanners that will be using wireless printing must have Ad Hoc Communications enabled. By default the Ad Hoc Communications section is disabled. If you are using an RSMobile scanner with wireless access, clear the Disabled check box.

Mac Address: Type the MAC address from the RSMobile scanner. This can be located on the RSMobile scanner by tapping the Spectrum 24 icon in the bottom right corner of the screen. Next, tap **Status**. Tap the **IP Status** tab and the Mac Address displays.

NOTE: If you are adding a new RSMobile scanner using the **Initialize** feature, the system looks for a MAC Address. If one exists, this field is automatically populated.

The MAC address data is not presently used by O'Neil Stratus, but is collected here as a convenience for wireless network administrators. Administrators often allow only specific MAC addresses when securing their wireless access points. Now, the **Data Collection Device** grid can be used as a source of allowed MAC addresses when configuring a wireless network.

Click **Get IP Address** to automatically enter an IP address.

When you have completed all fields, click **Add** to add the new device.

Registration

When a new RSMobile scanner is purchased from O'Neil, registration information is entered before the scanner is shipped to you. The next time your database communicates with O'Neil Stratus, the information is automatically loaded into the **Data Collection Device** grid.

Record Storage Data Collection Device								
Options Search List Format Mark Clear								
	Dump Device	Device Name	Unique Unit ID	Platform ID	Registration ID	Active	Update User Code	Serial Num...
1	RSMobile	RS_16	58000050BF...	1E000700...	C93501A0A1...	No	~PROCESSOR	80875208...

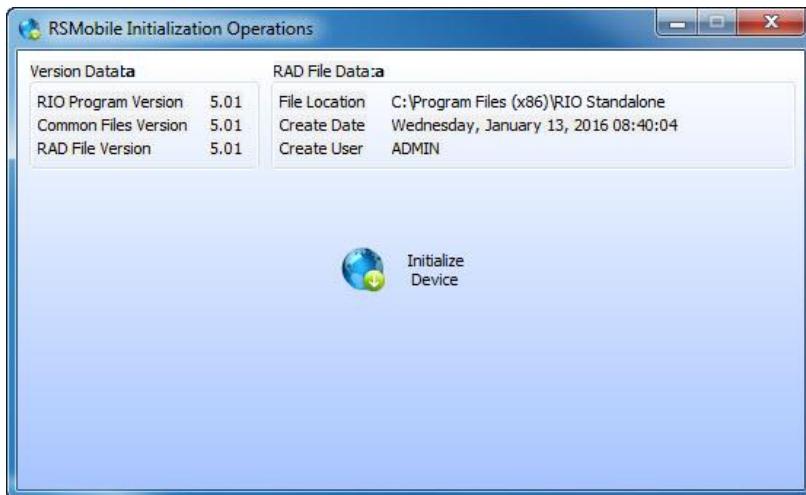
The device is given a generic name and is marked inactive. All devices loaded this way show an Update User Code of ~PROCESSOR. All you need to do is change the scanner to active, and initialize it.

Initialize a New Device

NOTE: The user who initializes an RSMobile scanner must have Account Access set to *All by Default* with no exclusions and must have Item Security Code set to 99.

Once a device has been added, it must be initialized before it can be used.

To initialize a device, place it in the cradle. If the device has already been added to the **Data Collection Device** grid, select the device in the grid. Open the RIO program and click **Initialize Device**.



The RIO program lets you know what information is being sent to the RSMobile scanner. When it is complete, Initialize Device becomes available again and you can initialize another device if needed.

NOTE: The RSMobile scanner performs a soft reset after each initialization.

If the device is new and has not yet been added, you receive the following prompt.



You will need to add the device and create a new RAD file before the device can be initialized. Click **OK** to close the dialog box.

Initialize an Existing Device

There are times when it is necessary to initialize an existing device; for example, when you have a new software release. When you initialize a device, the following information is sent to the device:

- Program files
- DLLs
- Device Configuration
- Data (translatable strings, barcode lengths, users, objects, date and time)

All existing information is deleted and replaced with the new information. Information on the storage card is also deleted.

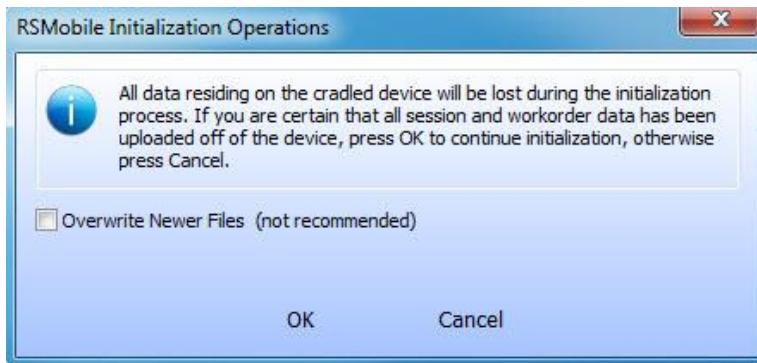
NOTE: You must exit the RSMobile program on the scanner before initializing it. If you don't, the database on the RSMobile scanner becomes locked and when the initialization process attempts to open the database, it fails.

To initialize an existing device, place it in the cradle. Select the device in the **Data Collection Device** grid. Open the RIO program and click **Initialize Device**.

The following dialog appears warning you that all data in the RSMobile scanner should be uploaded first or it will be lost. There is a check box in the dialog box that is used to indicate whether or not you want to overwrite newer files. If this check box is selected, all files on the RSMobile scanner will be overwritten, even files on the device that are newer than the ones being copied.

NOTE: Since all files are being written, this form of initialization usually takes much longer. Typical initializations only copy newer files to replace older ones.

It is not recommended that you select this check box unless you want to change the RSMobile software on your RSMobile scanner back to an older version.



Click **OK** to continue.

The RIO program lets you know what information is being sent to the RSMobile scanner. When it is complete, Initialize Device becomes available again and you can initialize another device if needed.

NOTE: The RSMobile scanner performs a soft reset after each initialization.

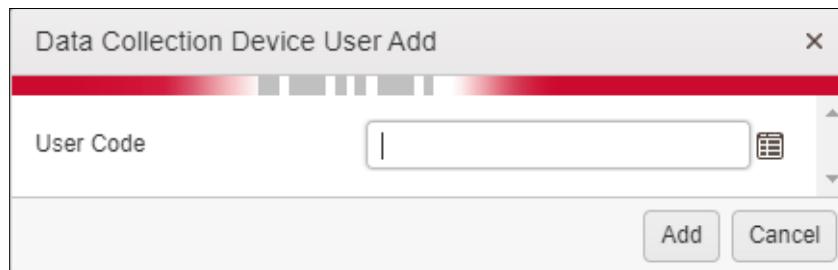
Add Users

By default, all active standard users can log on to any RSMobile scanner. If you want to restrict the users, you must add the ones you want to grant access to. Once a user is added, the default is ignored and only the users that have been added for that RSMobile scanner can log on to it. Users can be added to more than one device and a device can have many users.

In the **Data Collection Device** grid, right click on the device for which you want to add a user, and select **User**. The **Data Collection Device User** grid appears displaying any users currently set up for that device.

NOTE: If no users display, that means the default is being used and all users can log on to that device.

To add a new user right click anywhere in the grid and select **Add**. The **Data Collection Device User Add** dialog box appears.



Type in the User Code, or click the grid picker to display a list of all users. Click **Add** to add the user.

RSMobile Passwords

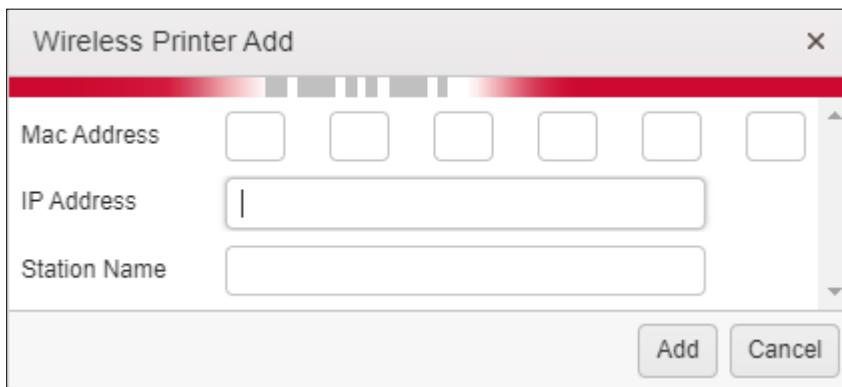
An optional password to be used only when logging onto RSMobile can be assigned in the standard **User** dialog. For more information on assigning this password, see Adding Users section in the Security/User Access chapter.

Wireless Printer

Add a Wireless Printer

NOTE: Only microFlash 2 printers and above are supported with firmware versions 4.xx and above. Printing works with 4-inch printers, but the output is still formatted for the 2-inch printer.

Wireless printers must be added to the O'Neil Stratus database in order to be sent to the RSMobile/O'Neil Mobile scanner. From the **Administration** menu, **Setup** submenu, select **Wireless Printer**. The **Wireless Printer** grid appears. To add a new printer, right click anywhere in the grid and select **Add**.



MAC Address: The MAC address is a unique unalterable key hardwired into each printer. Type the MAC Address. This information can be obtained by printing out the printer configuration information on the printer.

IP Address: The IP address is used during ad hoc communications only. This field is automatically filled in.

Station Name: Type the Station Name. This is a user-friendly name given to the printer. It must be unique.

When all fields are complete, click **Add**. The printer is added to the database and appears in the **Wireless Printer** grid.

Download Printers to RSMobile Scanner

The downloading of printers to RSMobile scanners works the same way as strings, objects, etc. All printers in the **Wireless Printer** grid are downloaded to RSMobile scanners during initialization only. During communication sessions between RSMobile scanners and O'Neil Stratus, any changes (which includes adds) since the last communication are sent to the RSMobile scanner. Printers that have been deleted from the system are only deleted from the RSMobile scanner during initialization.

Business Hours

To set up Business Hours for your record center, from the **Administration** menu, **Setup** submenu, select **Business Hours**. The **Business Hours** grid appears.

Record Storage Business Hours				
Options Search Format Mark Clear 				
	Day of Week	Open Ti...	Close Time	
1	Monday	8:00 AM	5:00 PM	
2	Tuesday	8:00 AM	5:00 PM	
3	Wednesday	8:00 AM	5:00 PM	
4	Thursday	8:00 AM	5:00 PM	
5	Friday	8:00 AM	5:00 PM	

 100 items per page

To set up your business hours, right click anywhere in the grid and select **Add**. The **Business Hours Add** dialog appears.

Business Hours ADD

Days Of Week	<input type="checkbox"/> Sun <input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat
Open Time	<input style="width: 100px; height: 25px;" type="text"/>
Close Time	<input style="width: 100px; height: 25px;" type="text"/>
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

Select the check box for the days you want to set times for. Click the time picker next to the Open Time and Close Time fields to select a time. Click **Add** to save your entry. When you have finished, click **Cancel** to return to the **Business Hours** grid.

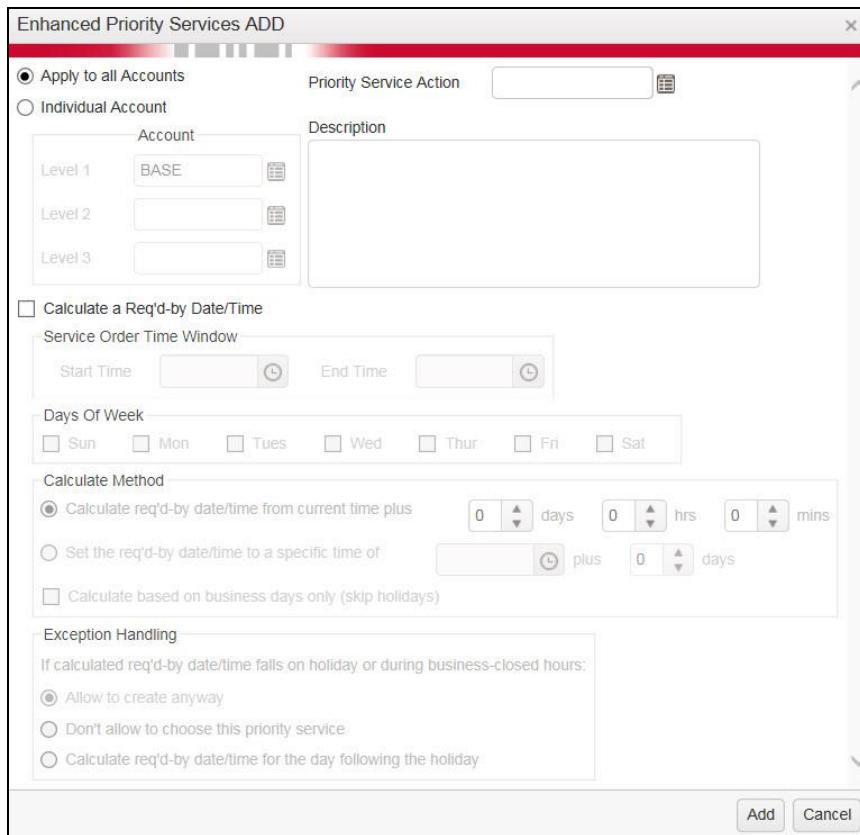
Enhanced Priority Services

The Enhanced Priority Services feature allows the Required By Date/Time to automatically be calculated for priority services when creating workorders or web orders. Before using this feature, it is recommended that you set up holidays and business hours for your record center.

NOTE: The enhanced priority services feature does not apply when converting workorders from a schedule.

Set Up Enhanced Priority Services

From the **Administration** menu, **Setup** submenu, select **Enhanced Priority Services**. The **Enhanced Priority Services** grid appears. To set up a new service, right click anywhere in the grid and select **Add**. The **Enhanced Priority Services Add** dialog box appears.



Base/Individual Account: Select whether this service applies to all accounts or to an individual account. If it is for an individual account, select the Account.

Priority Service Action: Click the grid picker to select the priority service action previously set up in the **Action** grid.

Description: Type a description for this enhanced priority service.

Calculate a Req'd-by Date/Time: When this check box is selected, the Req'd-by Date/Time for the selected account and Priority Service Action is calculated when the Priority Service is selected in the **Workorder** dialog box or when creating an order/workorder in RSWeb.NET/O'Neil Order.

After an enhanced priority service is added with the Calculate a Req'd-by-Date/Time turned off, you cannot edit the record to turn the field on. You will need to delete the service and then create a new one.

Service Order Time Window: Specify the Start and End Time range used when calculating the Req'd-by Date/Time.

Days Of Week: Specify the days of the week that the calculation is to be done.

Calculate Method: Specify whether you want to calculate the Req'd-by Date/Time from the current time or set it to a specific time.

From Current Time: Enter the days, hours, or minutes to add to the current time for the priority service selection.

Specific Time: Enter a specific time and the number of days to add to the current date for the priority service selection.

Calculate based on business days only (skip holidays): When this check box is selected, the Req'd by Date/Time is calculated by skipping any holidays. The calculation skips over the holidays and adds the specified day offset to the Req'd by Date/Time. If the Req'd by Date/Time falls on business-closed hours after the calculation, it will be adjusted to the next open business day. Exception handling is

disabled. **NOTE:** For the calculation to skip over holidays, holidays must be set up in the **Holiday** grid.

Exception Handling: Specify how you want to handle when the calculated Req'd-by Date/Time falls on a holiday or during hours your record center is closed.

Allow to create anyway: When selected, the Req'd-by Date/Time is calculated and entered even if it falls on a holiday or non-business day.

Don't allow to choose this priority service: No Req'd-by Date/Time is calculated and a message appears stating "The Req'd-by Date/Time falls on a holiday".

Calculate req'd-by date/time for the day following the holiday. The Req'd-by Date/Time will be the next open business day.

NOTE: Global Edit is available for the following fields: Priority, Description, Start/End Time, Exception Handling, Account, Day of Week.

When you have completed all fields, click **Add** to save. When you are finished setting up new Enhanced Priority Services, click **Cancel** to exit the dialog box.

Enhanced Priority Services for RSWeb.NET/O'Neil Order

If an Enhanced Priority Service is set up (entry is defined in the grid), the Service Priority available to the Web user is based on the account entered by the user and the current date/time.

If Enhanced Priority Service is not set up, the Service Priority available is based on the priority set up in the **Action** grid. Only priorities that have the Public flag set to Yes are available. In this case, the Required By Date/Time is not automatically calculated.

NOTE: If you have five priorities set up in your database, but only setup Enhanced Priority Services for two of those priorities, only those two will appear in RSWeb.NET/O'Neil Order.

Workorder Priority Action

The **Workorder Priority Action** grid allows you to map a posted priority to a workorder priority/action pair. From the **Administration** menu, **Setup** submenu, select **Workorder Priority Action**. The **Workorder Priority Action** grid appears.

NOTE: Before doing this, priority action codes will need to be created. In the example below, the posted priority action codes 3 HOUR_PULL, 3 HOUR_DEL, and 2 HOUR_PULL were previously created.

Record Storage Workorder Priority Action				
Options Search List Format Mark Clear				
	Workorder Priority Action Code	Action Code	Posted Priority Action Code	
1	3 HOUR	PULL	3 HOUR_PULL	
2	3 HOUR	DELIVERY	3 HOUR_DEL	
3	2HR_RUSH	DELIVERY	2HR_RUSH	

To assign a posted priority to a workorder priority/workorder action pair, right click anywhere in the grid and select **Add**. The **Workorder Priority Action Add** dialog appears.

Workorder Priority Action Add

Workorder Priority Action Code	<input style="width: 100%; height: 25px; border: 1px solid #ccc; padding: 2px;" type="text" value="2 HOUR"/> ...
Action Code	<input style="width: 100%; height: 25px; border: 1px solid #ccc; padding: 2px;" type="text" value="PULL"/> ...
Posted Priority Action Code	<input style="width: 100%; height: 25px; border: 1px solid #ccc; padding: 2px;" type="text" value="2 HOUR_PULL"/> ...
<input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="Add"/> <input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px;" type="button" value="Cancel"/>	

Workorder Priority Action Code: Click the drop down arrow to select an existing workorder priority. This is the priority that will be specified in the **Workorder** dialog. Only priority actions with Posted Priority set to No are available in this drop down list. For more information, see the Actions section.

Action Code: Click the drop down arrow to select an action to be combined with the above workorder priority. This action must be part of the workorder activity set.

Posted Priority Action Code: Click the drop down arrow to select the Posted Priority generated each time the above two conditions exist. Only priority actions with Posted Priority set to Yes are available in this drop down list. For more information, see the Actions section.

In the above example, we are saying for all workorder accounts that have the *Apply Priority Service to each action of activity sets* check box selected, when a priority of 2 HOUR is entered as the workorder priority, for each item activity having the action of PULL, generate an additional action of 2 HOUR_PULL.

O'Neil Mobile Device Authorization

All O'Neil Mobile devices used by an O'Neil Stratus Standard User must be approved for such use. This feature is designed to provide the record center with greater control of costs by reducing the possibility of O'Neil Mobile use by devices that are not authorized for use by Standard Users. Web User use of O'Neil Mobile is not affected by this feature in any way.

When a standard user logs into O'Neil Mobile on a device that has not yet been authorized, they receive an error message and the device information is added to the **Device Authorization** grid in O'Neil Stratus. An administrator will need to review the devices to determine which ones should be authorized.

From the **Administration** menu, **Setup** submenu, select **Device Authorization**.

Record Storage Device Authorization							
Options		Search		List		Format	
Device ID		Device ID Type		Record Create Date...		Attempted Login Date...	
1	1ffbf30d65a...	3		2/10/2017 10:19 AM	2/10/2017 10:19 AM	curtis	2/10/2017 10:19 AM Yes
2	836F2E0C10...	2		3/3/2017 9:22 AM	3/3/2017 9:22 AM	Curtis	3/3/2017 9:24 AM Yes
3	6773DE0385...	2		8/15/2017 1:38 PM	8/15/2017 1:38 PM	curtis	8/15/2017 1:39 PM Yes
4	9900062101...	1		1/28/2019 12:48 PM	1/28/2019 12:48 PM	curtis	1/28/2019 12:50 PM Yes
5	3574040500...	1		1/29/2019 6:19 AM	1/29/2019 6:19 AM	curtis	1/29/2019 6:28 AM Yes
6	0167D01B75...	2		2/15/2019 9:16 AM	2/15/2019 9:16 AM	curtis	2/15/2019 9:17 AM Yes
7	A09F1B3756...	2		2/15/2019 10:36 AM	2/15/2019 10:36 AM	curtis	2/15/2019 10:39 AM Yes
8	9577430605...	5		4/7/2020 9:37 AM	4/7/2020 9:37 AM	TRISHA	4/7/2020 9:37 AM Yes
9	2288007173...	5		4/7/2020 9:37 AM	4/7/2020 9:37 AM	DARREN	4/7/2020 9:37 AM Yes
10	0210000010...	5		4/7/2020 9:37 AM	4/7/2020 9:37 AM	DUKE	4/7/2020 9:37 AM No

The device information is added to the grid, but the Authorized field is set to No. To authorize the device for use, right click on it and select **Edit**.

Device Authorization Edit							
Device ID	357404050034670	Decision Date	1/29/2019				
Device ID Type	1	Decision Time	6:28 AM				
Record Create Date	1/29/2019	Authorized	Yes				
Record Create Time	6:19 AM	Alias	Tim's TC55				
Attempted Login Date	1/29/2019	Notes					
Attempted Login Time	6:19 AM	Collect GPS	Yes				
Attempted Login User Code	curtis	Idle Timeout	0				
		Warehouse Description					
				<input type="button" value="Edit"/>	<input type="button" value="Cancel"/>		

Device ID: The Device ID is displayed.

Device ID Type: This field indicates the type of device.

- 1: Android Device (w/ mobile network capability)
- 2: iOS Device
- 3: Android Device (wifi only)

Record Create Date/Time: This is the date and time this record was created. This field is read-only.

Attempted Login Date/Time: This is the date and time the user attempted to log in from this device. This field is read-only.

Attempted Login User Code: This is the user that attempted to log in. This field is read-only.

Decision Date/Time: This is the date and time the Authorized field was changed. This field is read-only.

Authorized: To allow use of this device, set the Authorized field to Yes.

Alias: This field allows you to give a short (up to 40 characters), more user friendly name (John's scanner or Delivery Scanner 1) to the device. If an Alias is entered here, it will display on the device anywhere the Device ID displays.

Notes: This field allows up to 512 characters for any additional information you want to add.

Collect GPS: To collect GPS data from the device, set this field to Yes.

Idle Timeout: You can set the amount of time a device can remain idle before the user is logged out.

Warehouse Description: If your record center has more than one warehouse, you can select the warehouse where this device will be used.

When you have finished, click **Edit**. Once the Authorized field is set to Yes, the Decision Date and Time are added to the record, and the Standard User can now use the O'Neil Mobile device.

Warehouse Details

The **Warehouse** grid allows you to store information for individual warehouses belonging to your record center. From the **Administration** menu, select **Setup**, and then **Warehouse Details**.

Record Storage Warehouse							
Description		Building	Contact	Address Line 1	Address Line 2	Phone	Latitude
1	Cushing Warehouse	1	Gene Watson	11 Cushing	Irvine, CA 92618	949-458-1234	33.63990200
2	Coastal Warehouse	2	Selena Tenet	308 Coast Blvd.	Irvine, CA 92618	949-268-7265	33.64096320

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

Warehouse Add	
Description	<input type="text"/>
Building	<input type="text"/>
Contact	<input type="text"/>
Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
Address Line 3	<input type="text"/>
Phone	<input type="text"/>
Fax	<input type="text"/>
Latitude	<input type="text"/> <input type="button" value="▼"/>
Longitude	<input type="text"/> <input type="button" value="▼"/>
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

Description: Enter a description for the warehouse, something that will help to identify it.

Building: A building identifier can be entered here.

Contact: Enter a contact name for the warehouse.

Address: Enter the address of the warehouse.

Phone: Enter a phone number for the warehouse.

Fax: Enter a fax number for the warehouse.

Latitude/Longitude: Enter the latitude and longitude.

Function Access

The following function access is available for the Warehouse Details feature.

Menu	Grid	Item Type	Item	Access
Options\Setup\Warehouse Details	Warehouse	Pushbutton	Add	Yes
Options\Setup\Warehouse Details	Warehouse	Pushbutton	Edit	Yes
Options\Setup\Warehouse Details	Warehouse	Pushbutton	Delete	Yes
Options\Setup\Warehouse Details	Warehouse	Grid Menu Item	Global Edit	Yes
Options\Setup\Warehouse Details	Warehouse	Grid Menu Item	Global Delete	Yes
Options\Setup\Warehouse Details	Warehouse	Special Button Access	Save Query	Yes
Options\Setup\Warehouse Details	Warehouse	Special Button Access	Save Format	Yes

Account Set Up

Account Information

Accounts, the entities with whom you contract to provide storage and other services, can be set up through the **Account** option. Using this function, you are able to fully identify your clients and customize their accounts to suit your and their needs. To enter a new account in the system, from the **Administration** menu, select **Account**. In the **Account** grid, right click and select **Add**.

Account Add

Billing Info...

Account	Mail Address
Level 1 6500	Attention <input type="text"/>
Level 2	Address <input type="text"/>
Level 3	<input type="text"/> <input type="text"/>

Copy Parent Account Settings

Account Info

Account Description	<input type="text"/>
Open?	Yes
Contract Expire Date	<input type="text"/> <input type="button" value="Calendar"/>
PO Number	<input type="text"/>
Salesman Code	<input type="text"/>
Separate Invoice?	Yes
Delinquent?	No
Setup Date	11/25/2020 <input type="button" value="Calendar"/>
Force Authorization?	No
Use Parent Retention?	No
Content Validation?	No
Enable O'Neil Bridge?	No
Group	<input type="text"/>
Account Reference	<input type="text"/>

Pickup/Delivery Address

Contact	<input type="button" value="Copy Mail Address"/>
Address	<input type="text"/>
Phone	<input type="text"/>
Fax	<input type="text"/>
Route	<input type="text"/>
Stop Group	<input type="text"/>
Latitude	<input type="text"/> <input type="button" value="Up"/>
Longitude	<input type="text"/> <input type="button" value="Down"/>

Copy Options

<input type="checkbox"/> Copy Instructions and Authorized List on submit
--

Workorders

Default Priority	<input type="text"/> <input type="button" value="Edit"/> <input type="checkbox"/> Priority Required
Workorder Charges	Workorder Account <input type="button" value="Down"/>
Workorder Pickup Receive Charges	Workorder History Account <input type="button" value="Down"/>
Contact PIN Required by Default	No <input type="button" value="Down"/>

Add **Cancel**

Account Levels

Quite often, your accounts cannot be described adequately with one set of attributes. For example, an account may have more than one location making it necessary for you to maintain two delivery addresses.

Yet, the same account wants one combined invoice that is to be sent to the main office. Account Levels enable you to record and facilitate these distinctions up to three levels deep.

Each level is considered an account on its own. For example, ABC Corp. has three locations (ABC Corp. Headquarters, ABC West and ABC East) that store their records in your facility. You could set up three accounts, but with a hierarchy as shown below.

ABC Corp's account would be listed as

Level 1	ABC Corp
Level 2	_____
Level 3	_____

ABC West's account would be listed as

Level 1	ABC Corp
Level 2	West
Level 3	_____

ABC East's account would be listed as:

Level 1	ABC Corp
Level 2	East
Level 3	_____

To enter these accounts into the system, you would need to add ABC Corp first--a Level 1 Account. Then after completely describing ABC Corp at Level 1, add each of the Level 2 Accounts. First choose the Level 1 Account that the Level 2 Account will "belong" to. Then enter the code for the Level 2 Account--East or West in our example. Then completely describe the Level 2 Account.

This hierarchy of accounts in which each account is both related to the other accounts, and yet remains distinct, gives the record center a great amount of flexibility with invoicing, reporting, and workflow organization. (For information on allowing one account to access another account's items, see Account Links in the *Workorders* chapter.)

Account Description

This free-text field allows you to enter the full name of the Account. This name appears on grids, reports, invoices, workorders and searches.

Open

This field allows you to set up a Level 2 or Level 3 Account so that a higher level account can request Level 2 or 3 items on workorders. (It has no effect on a Level 1 Account.) When a Level 2 Account is defined as Open, users from the Level 1 account can access Level 2 items on Level 1 workorders. This "downward flow" cannot be reversed. This implies that Level 2 Account workorders cannot access Level 1 items even if the Open value is Yes for Level 1.

If the Open field is set to No for a Level 2 or Level 3 Account, a higher level account workorder cannot select the account's items. That the Level 2 Account is set to No has no effect on the Level 3 Account from the perspective of the Level 1 Account. This means that a Level 1 Account workorder can access Level 3 Account boxes as long as Open is set to Yes for the Level 3 Account. That Level 2 is set to No is of no consequence.

This capability allows on/off control over who can have access to items within an account hierarchy that you have set up within O'Neil Stratus. This control can be important for security reasons. (For information on allowing one account to access another account's items, see Account Links in the *Workorders* chapter.)

Contract Expire Date

The contract expiration date shows the date on which an account is up for renewal. This field is optional and can be used in searching and reporting.

PO Number

Some of your accounts may request that you reference a purchase order number on their invoices. That number can be entered here, and prints on invoices and workorders, and wherever else it is set up to do so.

Salesman Code

This field allows you to identify the sales representative from your office who services this account. The field is optional and can be used in searching and reporting.

Separate Invoice

This is a required field for Account Levels 2 or 3. It has no meaning for Level 1 Accounts. If each account level requires an individual invoice, set this field to Yes. Each account receives separate invoices. When separate invoices are generated, individual Account Transactions (prices) can be created for each one.

If this field is set to No, the account's Storage and Service Activity are combined into its upper level, or parent, account for billing purposes. All transaction information (i.e., rates, quantity breaks, etc.) is taken from the parent account.

The invoicing option allows you to override this flag and produce a separate invoice for each account--even those with Separate Invoice set to No. However, even when using this override, an account with Separate Invoice set to No uses the transactions information of its parent.

Question: I have set up an account hierarchy with Level 1, Level 2, and Level 3 Accounts. Initially Level 2 and Level 3 had Separate Invoice set to Yes and I set up sets of transactions for each account. Now I have changed my mind and set the Separate Invoice flag for all Level 2 and 3 Accounts to No. Have the transactions at Level 2 and 3 been deleted? How will they be used?

Answer: By setting Separate Invoice to No, for all Level 2 and 3 Accounts, you have said you want the invoicing operation to ignore any transactions set up explicitly at these levels. During invoicing, the Level 2 and 3 Accounts will use, or inherit, the transactions set up for the Level 1 Account, even if you choose to override the Separate Invoice flag and produce an individual invoice for each account. The transactions you set up for the Level 2 and 3 Accounts are still there, but they will not be used unless you set Separate Invoice back to Yes.

Delinquent

This field lets you make your order takers aware of the status of an account when an order is placed. This field is manually changed, and the information appears in the **Workorder** dialog box.

Setup Date

This is the date that an account was set up. It defaults to the date that you enter information for the account, but can be changed manually.

Force Authorization

When set to Yes, this causes the system to require the person generating a workorder for this account to enter the name and password of the customer requesting the workorder. The system checks the entry against the Authorized List for that account. Although the system is not case sensitive when checking for matches,

the name and password must be exact matches in all other respects for the operator to be able to continue with the workorder. The name entered appears on the printed workorder. Force Authorization works the same for Pre-workorders and regular workorders. For more information, see the Authorized List section in the *Setup* chapter and the *Workorders* chapter.

Use Parent Retention

When set to Yes, this indicates that the account should inherit retention information from its parent account if no retention information exists for the account and record series. The default setting is No.

NOTE: Level 2 will inherit from Level 1, and Level 3 will inherit from Level 2.

If an item entered for a specific account level does not have an Account Retention Schedule at that level, the program will check that account's Inheritance Flag. If it is set to Yes, then the program looks for a higher level Account Retention Schedule. If none is found, the program will then look instead for a Base Retention Schedule. If still none is found, it will make the object type more general and try the different account types again.

On the other hand, if the account's Inheritance Flag is set to No, then the program immediately looks for a Base Retention schedule. If no Base Retention schedule is found, it will make the object type more general and try the actual account again. If none is found, then no Retention calculation will be performed.

The following shows the search hierarchy in which the system checks for retention information:

Actual Account	/	Actual Object ID
Inherit Account – L2	/	Actual Object ID
Inherit Account – L1	/	Actual Object ID
BASE Account	/	Actual Object ID
Actual Account	/	Base Object ID
Inherit Account – L2	/	Base Object ID
Inherit Account – L1	/	Base Object ID
BASE Account	/	Base Object ID
Actual Account	/	ITEM Object ID
Inherit Account – L2	/	ITEM Object ID
Inherit Account – L1	/	ITEM Object ID
BASE Account	/	ITEM Object ID

NOTE: If the search encounters an Inactive record as it moves through the hierarchy, the search ends. An Inactive record does not affect those above it in the hierarchy.

Content Validation

When set to Yes, Content Validation is mandatory for this account. This means that a container placed on a picklist or refile list is automatically placed on a Content Validation list.

Enable O'Neil Bridge?

When set to Yes, O'Neil Bridge is enabled for the account. For more information on using O'Neil Bridge, see the *O'Neil Bridge* chapter.

Group

The Group field allows you to enter up to 25 characters of text. This field can be used for any purpose.

Account Reference

This field can be used to represent a customer's cost center or any other reference where current fields have size limitations or are used for other reasons.

This field can have any value of up to 20 alphanumeric characters, but it can also be left blank. Different accounts can have similar values for the field. This field does not print on invoices or workorders.

Default Priority

This section gives you the ability to specify a default priority for workorders by account. You can also indicate whether the workorder priority is required. This applies to workorders, pre-workorders, and web orders.

In the Workorders section, click the grid picker next to the Default Priority field to select the default priority for the account. Select the Priority Required check box to require that a priority is included when creating a workorder.

RSWeb.NET/O'Neil Order Note for Default Priority

If the Default Priority action code is selected for an account in O'Neil Stratus, the Service Priority in the RSWeb.NET or O'Neil Order Workorder/Order page will automatically be filled with the specified action code. If the Web user selects another account without Default Priority specified, the Service Priority will be cleared.

If Enhanced Priority Service is setup, the Service Priority available in RSWeb.NET or O'Neil Order is limited to the ones that are available at current date/time. If the Default Priority action code specified is not part of the Service Priority list in RSWeb.NET or O'Neil Order due to the Enhanced Priority Service setup, the Service Priority will default to blank.

RSWeb.NET/O'Neil Order Note for Priority Required

If the Priority Required is set for an account in O'Neil Stratus, the Web user is required to select a Service Priority in RSWeb.NET or O'Neil Order before submitting the Order/Workorder. Otherwise, the error message "Service Priority is required" is displayed.

If Enhanced Priority Service is set up and there is no available Service Priority at current date/time in RSWeb.NET or O'Neil Order, the Web user will not be able to place a workorder. However, for web orders the Priority Required flag is ignored and the Web user can submit the Web order without specifying a Service Priority.

Charges

Workorder Charges

Select whether the workorder account or the item account is to be charged. Workorder Account is selected by default.

Workorder Pickup Receive Charges

This field determines how pickup/receive items on a workorder should be billed. When set to Workorder History Account, the account from the most recent workorder activity for the item is charged. When set to Item Account, the item account is charged. When set to Workorder Account, the workorder account is charged. Workorder History Account is selected by default.

All accounts and sub-accounts can be set separately. When adding a new sub-account, both these fields default to the same value as the parent. If the fields for a sub-account are ever blanked out, when the record is saved the fields will be populated with the setting from the parent account.

NOTE: During workorder entry or Comm Session processing of workorders, O'Neil Stratus uses the workorder account as the account from which these charge settings are retrieved in order to determine the charge account for the workorder.

Contact PIN

When the *Contact PIN Required by Default* field is set to Yes, a PIN will need to be entered for all workorders for the account.

This feature is used when your customer requires that only specific users can accept delivery or pickup of items. The customer must enter a validated PIN code in O'Neil Mobile before the driver can deliver or pickup items.

Customer personnel who are identified as "authorized receivers" for workorder items will need to be added as O'Neil Stratus Web Users and have a PIN assigned to them by the record center. They will also need to have account access down to the Workorder Account Level in order to be selected as a PIN user for that workorder.

Mail Address

Invoices are sent to the address/attention listed here.

Pickup / Delivery Address

The workorders show this address as the one the truck should go to for pick ups and deliveries. To copy the Mail Address, click the **Copy Mail Address** button. All fields are immediately copied from the Mail Address fields to the Pickup/Delivery Address fields. You can then edit any of the Pickup/Delivery Address fields if necessary.

Route

This free-text field is optional and is intended to allow you to enter route identification so you can sort and print workorders for a specific geographic area. This field may be used in searching and reporting.

Stop Group

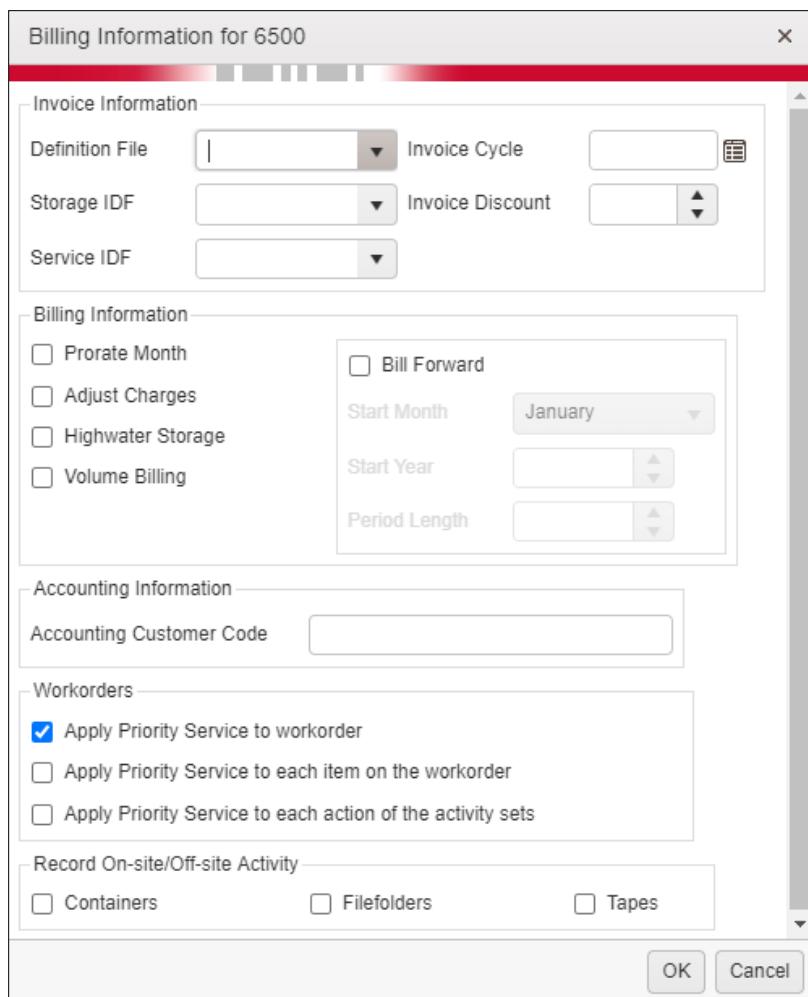
This free-text field is optional and can be used as criteria to create workorder groups. This field can have any value of up to 15 alphanumeric characters, but it can also be left blank. This field prints on workorders. It does not print on invoices.

Latitude/Longitude

This field is optional and is used with all GPS related features.

Billing Info

To establish the individual billing set up for your account, click **Billing Info** at the top of the **Account Add/Edit** dialog box. The **Billing Info** dialog box appears.



Invoice Information

O'Neil Stratus allows you to choose an invoice format for each account. Each format is designed in a Definition File that can be selected through this field. Several definition files are available. See the *Invoicing* chapter for more information regarding the standard system formats.

You can choose either the standard Definition File (prints both storage and services on the same invoice) or the storage/services only invoices.

Definition File

The storage+services invoice can only be specified if both storage only and services only are set to None. Storage and services will both print on the same invoice.

Storage/Services IDF

The storage only and/or services only invoices can only be specified if the storage+services invoice is set to None. The storage only and services only invoices can be any IDF (and can also be the same). The services will be ignored for a storage-only invoice, while storage will be ignored for a services-only invoice.

NOTE: If none of the storage+services/storage only/services only invoices is specified, the default IDF is assumed for the storage+services invoice.

When printing both a storage only and services only invoice, the invoices will be printed separately with different invoice numbers. Any Tracking charges will be placed in the storage invoice.

Since separate invoices are created with separate invoice numbers, all the saved tally information will be saved with the appropriate invoice.

For global print invoices, if storage and services are separated, the services invoice will be printed immediately after the storage invoice, before the invoices for the next group of accounts are printed. Also, if the Print Invoice Summary or Print Account Summary check box is selected, the summary still includes both storage and services.

Invoice Cycle

You may set up the invoice cycles you want -- monthly, quarterly, bi-annually, etc., and assign one to each Account (see Invoice Cycles in the *Setup* chapter). During Invoicing you can use this field as a search criterion for selecting a set of Accounts for invoicing.

Note that the value you put in this field need not represent time spans such as month or quarter. You can use it to group invoices in any manner you choose. For example, you might create an Invoice Cycle called STGOV for the large number of Accounts that originate from your state government. By grouping them together, they would be available as a set if they required special handling and review.

Invoice Discount

It is possible to apply a discount across-the-board to an Account's invoice. This percentage amount is entered here and is taken off the final invoice amount, before any minimum charges, surcharges and/or taxes are applied.

NOTE: There are other and perhaps more flexible ways to apply discounts. See Transactions and Invoicing chapters for details.

Prorate

When Prorate Month is selected, storage charges for new items are prorated for the number of days the new items have actually been in the record center during the invoicing cycle. The number of days a container is in the record center is calculated and shown on the invoice in the quantity column as fractional containers. For example, let's assume standard container storage rates are 30¢ per month. If a container is added to the system on June 21, the system would charge the Account for the final 10 days of June, and therefore charge 10¢ for that container for the month of June.

If the system is not instructed to Prorate, it charges the full 30¢ for the month of June.

One other point to note is that O'Neil Stratus does not prorate for items that are destroyed or returned permanently to the client during an invoice cycle. For example, a box destroyed on June 10 would be charged for Storage for the entire month, assuming it came in before June 1, even if Prorate is selected.

The Charge Per Container when Prorate is selected can be summarized as follows:

Proration for a New Container =

$$\frac{\text{Days In}}{\text{Invoice-Cycle-Length}} \times \text{Number of containers in the record center for the same number of days.} = \text{Quantity} \times \text{Rate}$$

Where,

"Rate" is taken from the Transaction grid and may have been modified if Adjust Flag (see below) is "Yes."

"Invoice-Cycle-Length" = Invoice-Cycle-End-Date - Invoice-Cycle-Begin-Date + 1.

"Days-In-Cycle-Item-Existed" = Invoice-Cycle-End-Date - Item-Add-Date + 1.

For an example of prorating, see the Prorate Month section in the *Invoicing* chapter.

It is important to note that Prorate Month and Adjust Charges have completely separate functions within O'Neil Stratus invoicing, but they are complementary. It is reasonable to have both set to "Yes," both set to "No," or either "Yes/No" combination depending on how you want your invoicing to work for a particular Account.

Adjust Charges

When Adjust Charges is selected for an Account, during invoicing O'Neil Stratus breaks the monthly rates for that account down into charge per day. (When you set up Rates in Transactions, O'Neil Stratus assumes you are setting them up for a 30 day cycle.)

For example, let's assume that the storage rate for a standard Container is 30¢ per month. Since the system assumes a 30 day month, it charges 1¢ per day. Therefore, the system would charge 30¢ per container for months that have 30 days, but 31¢ per container for months that have 31 days. In February the system would charge 28¢ or 29¢.

If the invoicing cycle has 90 days and Adjust is set to "Yes," the charge for a Standard Container is 90¢.

If Adjust is set to "No," then the charge for a standard container is 30¢ for whatever the length of the invoicing cycle--1 day, 30 days, 90 days, or 365 days.

The Charge Per Container when Adjust is set to "Yes" can be summarized as follows:

Adjusted Charge/Container =

Rate x Invoice-Cycle-Length / 30

Where,

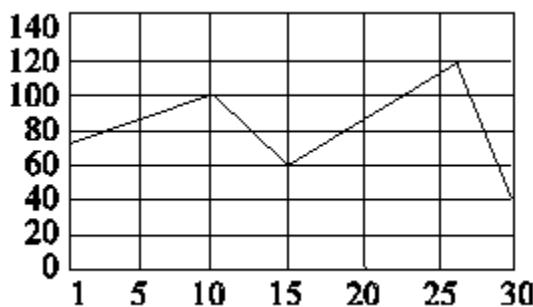
"Rate" is taken from the Transaction grid.

"Invoice-Cycle-Length" = Invoice-Cycle-End-Date - Invoice-Cycle-Begin-Date + 1.

"30" is the assumed number of days in an invoice cycle when you are setting up your Storage Transactions.

Highwater Storage

Highwater Storage charges the client for the highest quantity of boxes in the record center on any given day of the billing period in question. For example: on June 1, ABC Corp HQ has 75 containers on the system, but only 75 are in the facility. During the month containers are removed and returned, and 50 containers are added to the system. The account's activities are as shown on the graph below. The numbers on the left side represent the number of containers in the facility; the numbers along the bottom represent the date.



The month started with 75 containers in the facility. The amount went up to 100 on the 10th and down to 60 by the 15th. When ABC added 50 containers to the system and returned some others, the in-house quantity went up to 120 on the 26th, then down to 40 at the end of the month. Using Highwater Storage, the system

would only note the highest quantity, and charge for 120 containers. Without Highwater Storage, the system would charge for the 150 containers in the system.

NOTES:

1. The Adjust flag is used when calculating the rate for Highwater Storage, but the Prorate flag is ignored.
2. Highwater is calculated per item type. In other words, there would be separate highwater calculations for standard boxes, small boxes, high security boxes, etc.
3. Highwater quantities are calculated for each Account, even if Separate Invoice is set to "No." When the Highwater value for a particular item type is rolled into a combined invoice, the Highwater values for each Account in the combined invoice are added together.

Volume Billing

Volume Billing enables cubic foot billing for Storage and Services. It allows you to set up one transaction to bill for all accumulated cubic feet across many item subtypes. It also allows you to mix cubic foot charges with standard per object charges.

Volume billing will work in conjunction with any of the other account billing options. For storage, Volume Billing will work with either:

- In or Out – Charge by Item
- In Days Only – Charge by Day
- Out Days Only – Charge by Day
- In + Out Days Only – Charge by Day

Example 1: Pure Volume Billing

Suppose Account ABC is set up to support volume billing. The volumes of container subtypes HB25 and HB19 are 2.5 and 1.9 respectively. Also, account ABC is set up to be billed for delivering (unit volume of) containers as follows:

Quantity Break	Rate	Flat Rate
1	\$21.00	No
2 – 3	\$15.00	No
4 – 9999999	\$6.00	No

Assume that the accumulate flag is set to Yes for the above transaction. Also assume that the transaction quantity break target is Workorder.

In one workorder, account ABC asks for one HB25 and one HB19 to be delivered. The total volume of containers delivered is as follows:

$$2.5 + 1.9 = 4.4$$

So the charge for delivering one HB25 and one HB19 (or 4.4 unit volume of containers) is as follows:

$$1.0 \times \$21.00 + 2.0 \times \$15.00 + 1.4 \times \$6.00 = \$59.40$$

Example 2: Mixed Volume and Standard Billing

Suppose there is a container subtype HB00 which does not have a unit volume. Your warehouse sets up a base transaction to bill for delivering (quantities of) containers as follows:

Quantity Break	Rate	Flat Rate
1	\$12.00	No
2 – 9999999	\$5.00	No

In example #1 above, suppose account ABC also has 4 HB00 delivered to them in addition to the two HB25 and HB19 boxes, then the charges will be as follows:

Again, the charge for delivering one HB25 and one HB19:

$$1.0 \times \$21.00 + 2.0 \times \$15.00 + 1.4 \times \$6.00 = \$59.40$$

And the charge for delivering 4 HB00s:

$$1 \times \$12.00 + 3 \times \$5.00 = \$27.00$$

So, the total charge to account ABC for delivering one HB25, one HB29, and four HB00s is:

$$\$59.40 + \$27.00 = \$86.40$$

NOTE: In the Storage Quantity column on invoices if there is a mix of Volume and Each quantities, the subtotal does not print.

Bill Forward

Bill Forward allows you to invoice for Storage services you are going to provide in the future--like your own rent or mortgage payments. However, Record Center Storage is not as straightforward as apartment rent because levels of storage may change after you have invoiced. Providing for changing levels of storage and other services provided during the invoicing interim makes Bill Forward complex.

Start Month: You need to let the system know when you start Bill Forward invoicing for a client. Say you've been billing after the fact for a while, then you and your client decide to start Bill Forward on January 1st. Enter January in the Start Month field. On January 1st, you would invoice for the month of December, like you always have. Then you would also bill forward for the billing period to come. This could be for the month of January, or for any period you choose (see *Period Length*). This tells the system, along with Period Length, when to bill forward. It also provides an anchor for calculating interim charges for new storage items that come in during the invoicing cycle for which you have already billed forward.

Start Year: This is the year for the Start Month listed above. Use four-digits (2016, not 16).

Period Length: The Period Length is the number of months (maximum 240) that you are billing for on the Bill Forward invoices. For example, you may decide to bill ABC Co. twice a year for storage (you would enter the number 6 for a 6 month billing period). On January 1, you bill for storage for the objects in your facility on that date for the next six months. If they have 100 containers and you charge 30¢ per container per month, the Bill Forward amount is $30\text{¢} \times 100 \times 6 \text{ (months)} = \180.00 .

Then, at the end of each month (or other interim billing period), you charge for all services rendered during that period, and if any additional containers were added, you would Bill Forward for them for the time remaining in the 6 month period.

For example, using the situation above, ABC adds 10 additional containers in February. Assuming you do not prorate, the system charges $30\text{¢} \times 10 \text{ (containers)} \times 5 \text{ (months remaining in the period)} = \15.00 for those additional containers. (If you prorate, the system charges for the number of days in February that the containers were in the system and then adds to that value the four full months remaining in the period.)

NOTES:

1. To Bill Forward for periods greater than one month, you should set Adjust to "Yes." Otherwise, the rates you establish apply to the entire cycle.

2. If you Bill Forward for an account and its storage goes down during the invoicing period, O'Neil Stratus does NOT issue a credit or in some other fashion attempt to reduce the original Bill Forward charge by deducting from subsequent invoices. To continue the rent analogy, you do not get a refund on your rent just because you decide to move out in the middle of the month.
3. When invoicing, make sure that the Invoice Date Range does not exceed the Period Length.
4. Bill Forward is ignored if the transaction charge type is anything other than In + Out charge by Item.

Accounting Information

The Accounting Customer Code field is intended for those who utilize an outside accounting package to do your billing, since the accounting package code for your customers will not always be the same as the O'Neil Stratus Account Codes. This is the Account Code that you have set up for this customer in that Accounting Package. This allows you to enter an accounting package code to cross-reference the O'Neil Stratus Account.

Workorders

O'Neil Stratus allows you to charge for priority services per workorder, per item being delivered and/or per action of each activity set. For example, you may want to charge a flat rate of \$20.00 for deliveries with a 1-hour rush Priority Service. However, since it takes a certain amount of time to pick each container for that 1-hour delivery, you may want to apply a \$10.00 rush charge for each container being delivered in just one hour instead of the \$20.00 flat rate. Moreover, if the activity Deliver consists of the actions pulling and delivering, you may want to charge a separate priority for pulling and a separate priority for delivering.

In the Workorders section of the **Billing Info** dialog you have three choices.

Apply Priority Service to workorder: Select this check box to charge a flat rate for all priority services for this account. This check box is selected by default.

Apply Priority Service to each item on the workorder: Select this check box to charge Priority Service rates for each item on the priority workorder.

Apply Priority Service to each action of the activity sets: Select this check box to charge an additional priority for each action in the activity set.

Be sure to adjust your Account Transactions to reflect the appropriate priority service costs if you have some accounts that are billed per workorder and others that are billed for each item. The transaction for Workorder Priority is Priority/Client, while the transaction for Items per Workorder would be Priority/Item (or container, filefolder, tape or container/tape sub-type).

If the account was set up to Apply Priority Service to each action of activity sets, additional transactions need to be established for the posted priority actions that are set up in the **Workorder Priority Action** grid. (for more information, see the *Setup* chapter).

Example Situation - Bill Forward

Question:

At the end of the first month that a client begins storage with us, we bill them for Storage for the month that has just passed and 2 months in advance; all Services are billed monthly in arrears. The next quarter we need to back bill for any Storage that was added during those previous 2 months. I've worked with the proration feature already available in O'Neil Stratus and I can't seem to set it up in a way that will bill for us properly. Please give me some insight on this or a possible solution.

Response:

The record center wants to do quarterly billing for this customer. Let's assume the record center begins receiving boxes from the customer (XYZ Corp.) on February 11, 2016, but sets up the Account on February 1.

The “standard” approach to this invoicing scheme would be the following:

In Account Billing Info, select Bill Forward:	Start Month: February - The month you start receiving boxes from XYZ Corp.
	Start Year: 2016 - The year you start receiving boxes from the XYZ Corp.
	Period Length: 3 - Number of months in a quarter.
In Account Billing Info, Adjust:	The record center probably wants to turn on Adjust because the storage billing cycle is going to be 3 months. If Adjust is turned on, the rates set up in Transactions are “adjusted” for the 3 month cycle. (See Adjust Charges).
In Account Billing Info, Prorate:	This is optional. If you want a box that comes in at the end of the invoice cycle to be treated as if it has been in for the entire cycle, do NOT select Prorate. (See Prorate)

Let's say the record center does invoicing on the 4th of each month. So, on February 4, 2016 the record center runs invoices for Jan 1 through Jan 31, 2016. An invoice prints for XYZ Corp. if XYZ Corp. is one of the selected Accounts for invoicing. However, he will get an invoice of \$0.00. Remember, no boxes have come in yet, so no charges can be applied for Bill Forward Storage. There can be no service charges because the services in arrears would be for Jan 1-31 and the Account wasn't set up until Feb. 1.

Then March 4, 2016 comes around. This is NOT a Bill Forward month. The next Bill Forward month will not be until April--3 months beyond the February Start Month. So, the invoice produced for XYZ Corp. on March 4 will have “New Storage” for February 1 through April 30 (the end of the quarter). If 10 boxes came in on February 11 and 20 boxes on February 20 and Prorate has NOT been selected, the 30 boxes for February are going to show up as New Storage billed through the end of April. Of course, if Prorate is turned on, the number of boxes is going to be less than 30 because each box is counted only for the percentage of the billing cycle that it existed in O'Neil Stratus. In other words, if a box came in 10% through the quarter, it is going to be treated as “90% of a box.” Services for April will also show up on the invoice.

On April 4, 2016, XYZ Corp is invoiced again. On March 20, 50 new boxes came from the customer. Again, this is NOT a Bill Forward month. Just like in the previous month, the 50 new boxes are going to show up in Storage on the invoice as New Storage. Note that XYZ Corp will not be charged this month for the 20 boxes from March--the previous invoice already billed for those through the end of the quarterly billing cycle.

On May 4, 2016 XYZ Corp is invoiced once again. On April 6, 25 new boxes came in from the customer. Just like the previous 2 months the customer is invoiced for “New Storage” for the 25 new boxes. However, unlike the previous month, this IS the Bill Forward month. So, in addition to the “New Storage” charge, XYZ will get charged for the next 3 months--a total of 30 + 50 + 25 boxes. Of course, Services will be billed in arrears for April 1 through 30.

Example Situation - Annual Billing

Question:

We currently bill most accounts at an annual rate. We bill them annually in advance. We bill new boxes coming in during the middle of the contract year a prorated amount based on the number of days remaining in that year. This billing is done at the end of the month in which the boxes are received.

If customer ABC is on a calendar year with 100 boxes at \$3.00 per box per year, we bill them at \$300.00 on January 1. If they send 10 more boxes on July 1 we bill them \$15.00 (rate times number of days remaining in year divided by 365).

In O'Neil Stratus I have checked Prorate Month and Bill Forward (but not Adjust Charges). Start Month is January, Start Year is 1999, and Period Length is 12. I have also created an invoice cycle of Monthly. The Account Transaction for ABC Storage is \$3.00.

Is this the correct approach?

Response:

In summary, you should make the following corrections:

1. Set Adjust Charges to "Yes" (and leave Prorate set to "Yes").
2. Set your storage rate so that when adjusted for a 365 billing cycle, it results in the expected \$3.00. The rates you set up in the O'Neil Stratus Transactions are based on a 30 day billing cycle. So, to adjust for a 365 day cycle, figure as follows:

$$X = \$ \text{ Amount to place in rate table for storage}$$

$$X / 30 \text{ days} = \$3.00 / 365 \text{ days}$$

$$X = \$0.2466$$

To verify that this makes sense, turn this 30 day rate into a per day rate:

$$\$0.2466 / 30 = \$0.00822$$

Then for 365 days...

$$\$0.00822 \times 365 = \$3.00 \text{ (what you wanted to charge per year)}$$

Here's more detail about why it should be done this way (there are other approaches in O'Neil Stratus that will yield the expected result...almost).

Why not set the rate to \$3.00 and set Adjust Charges to 'No'?

This would work if you did not do any interim billing for the new boxes coming in during the year following the annual billing in January for all boxes under your management. If you do the interim billing to charge forward for the new boxes that have come in, you're going to charge \$3.00 per box no matter if it's the first, third or eleventh month following the primary bill forward invoice for the year.

How does having Adjust Charges set to 'Yes' effect the interim billing for a bill forward customer on a twelve month cycle?

Using January as the Bill Forward Month, and 12 as the Period Length, let's assume it's April 1 and you want to do the interim invoicing for New Storage (the boxes that came in during March). When you run the invoice, you enter the period March 1 through March 31.

The Storage date range would be set to March 1 through December 31. (You want to charge forward for the new boxes for the rest of the year.) This works out to 306 days (365 days - 31 days - 28 days).

So, for any boxes that came in during March you charge the rate in the rate table "adjusted" to 306 days. Let's say 10 boxes came in all of the same size. The 30-day rate as recorded in the rate table is \$0.2466. The rate per box adjusted from 30 days to 306 days is:

$$\$0.2466 \times 306 / 30 = \$2.5153$$

For 10 boxes, the new storage charge would be \$25.15

"Hold it!" You exclaim. "This assumes the boxes came in on March 1. We need to prorate because four of the boxes came in on March 10, four on March 20, and two on March 30."

With "Prorate Month" set to "Yes" for the Account, the necessary adjustments are handled. O'Neil Stratus "prorates" by calculating the equivalent number containers based on the part of the invoicing cycle that they were actually under the record center's management. For the 10 boxes that came in during March, it works out like this:

4 Boxes on March 10:

4 Boxes x (306 days - 9 days) / 306 days = 3.8824 equivalent boxes

4 Boxes on March 20:

4 Boxes x (306 days - 19 days) / 306 days = 3.7516 equivalent boxes

2 Boxes on March 30:

2 Boxes x (306 days - 29 days) / 306 days = 1.8105 equivalent boxes

9.4445 equivalent boxes

doing the arithmetic as before:

\$0.2466 x 306 / 30 = \$2.5153 per box

For 9.4445 boxes (instead of 10) the new storage charge would be \$23.76 (9.4445 x 2.5153).

For further reading on these and other invoicing issues, see the *Transactions* and *Invoicing* chapters.

Record On-site/Off-site Activity

O'Neil Stratus allows you to charge storage by the number of days an item was in and/or out during the invoice period. However, since keeping track of each day that an item is in or out can be quite resource consuming, O'Neil Stratus allows you to turn the function on or off for different items (tapes, files, and containers). Once you select In/Out days for Containers, Filefolders and/or Tapes, records are added to the **Item On/Off-Site Activity** grid whenever an item changes its status (deliveries, refiles, edit status changes, etc.).

NOTE: The Calculate On-site/Off-site Activity option must be turned on before the beginning invoice date for the calculations to be made correctly. If the system has not been told to keep that information, it cannot invoice for it.

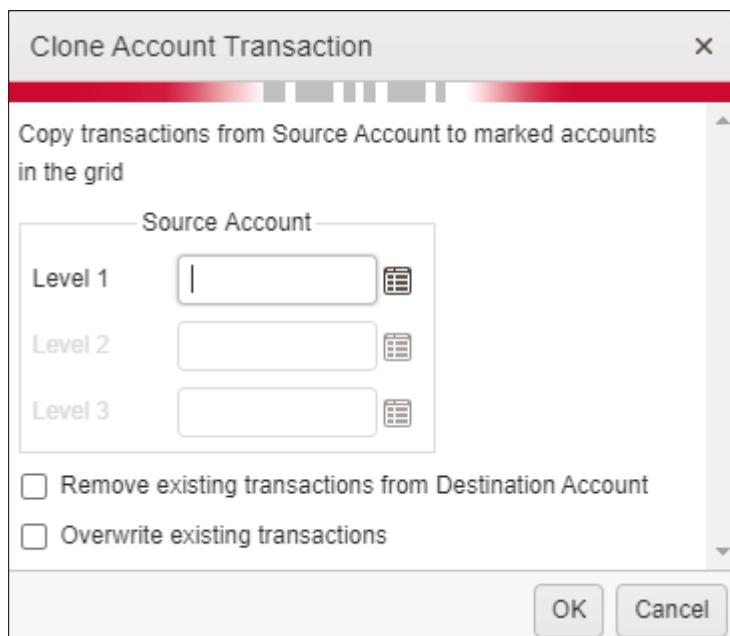
If this option was selected after the beginning of the invoice period, a warning will be generated during invoicing. The invoicing will continue, but your totals will probably not be accurate.

For information on billing for this option, see *Transactions* chapter, and for more information about the **Item On/Off-Site Activity** grid see Item On/Off Site Activity in the *Maintenance* chapter.

Clone Account Transactions

When you set up your pricing structure, you may find that you offer the same transaction combinations, quantity breaks and prices to several accounts. When this happens, you can copy (clone) the Account Transactions from one Account to other Accounts. This is particularly useful for copying Account Transactions to Level 2 and 3 accounts. This is done through the **Account** grid.

Load all the accounts that you want to copy Account Transactions to onto the **Account** grid. Make sure they are marked. From the **Options** menu, select **Clone Account Transactions**. The following dialog box appears.



Enter the account whose transactions you want to copy to the accounts on the grid. You can also choose the Base account to copy from.

Remove existing transactions from Destination Account

Selecting this option causes any existing transactions to be deleted from any accounts on the grid. Even if a transaction exists for the marked account that does not exist in the source account, it is deleted.

Overwrite existing transactions

When this option is selected, the system overwrites any existing transactions, but leaves transactions where the Source Account does not have one. For example, you load ABC Account onto the grid, and it has a transaction associated with it for Selling 1.2 Containers. You want to clone the transactions from XYZ Account, but XYZ does not have a transaction for selling 1.2 containers. That transaction remains with ABC.

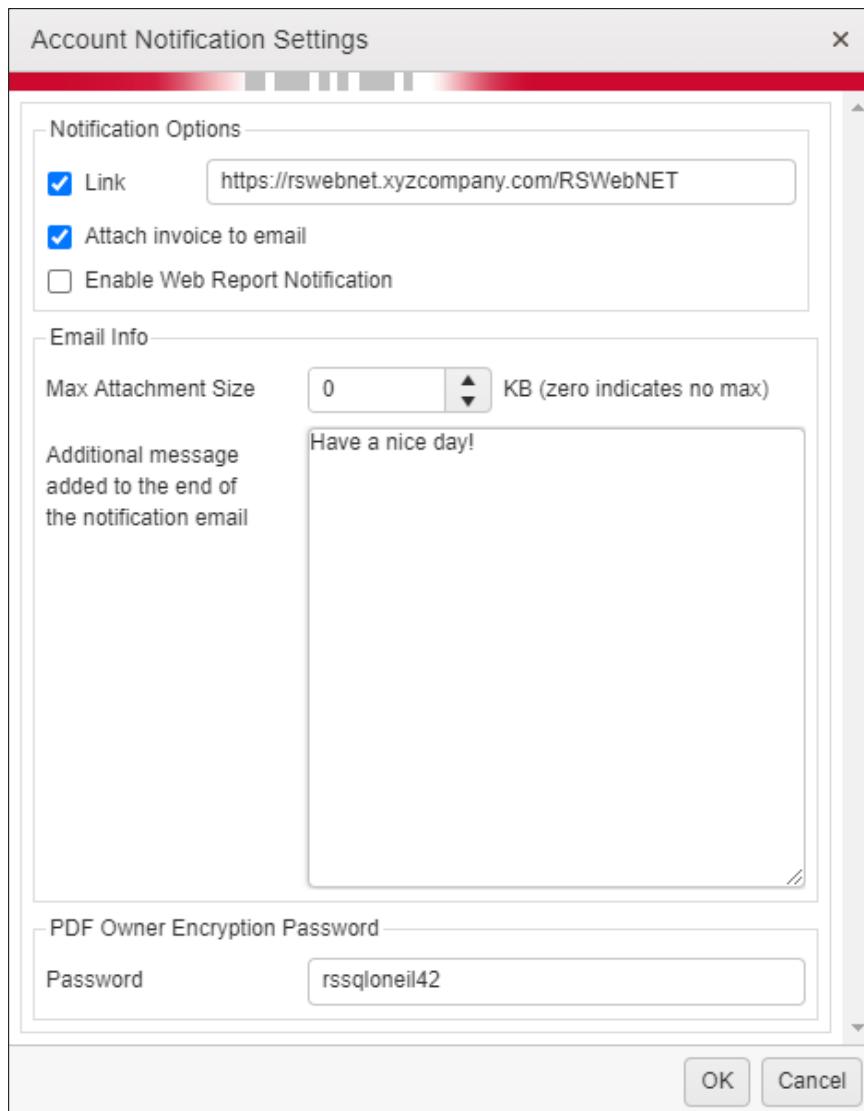
If neither of the above options is selected, the system does not overwrite any existing transactions, nor does it delete any. Any existing transactions remain, and any that were blank are filled in if they exist in the Source account.

Account Notification Settings

Notification Settings

You have the option to create, save, or email (as an attachment or link) PDFs of invoices and invoice account summaries so that specified recipients can view them through RSWeb.NET or as an attachment to email.

Before you create the PDFs, you need to set up notification options. From the **Administration** menu, select **Account**. In the **Account** grid, from the **Options** menu, select **Account Notification Settings**.



Notification Options

These settings indicate whether to allow the user to be notified by specifying a link to RSWeb.NET or O'Neil Order and/or attaching the PDF to the email.

Link: If the Link check box is selected, you must enter the full URL of the RSWeb.NET or O'Neil Order installation (provided to you by O'Neil). The address specified must be accessible from the Internet. A link to the PDF is included in the email when sent to your customer. To view the PDF, the email link will direct the user to log in to RSWeb.NET or O'Neil Order and then allow the user to download the PDF file. By default this check box is not selected.

Attach invoice to email: If this check box is selected, you are allowed to set up a user to attach the invoice to an email sent to your customer. By default this check box is not selected.

Enable Web Report Notification: Select to enable web report notification. When an order for a report is processed and the report is ready to be downloaded, an email will automatically be sent to the customer. For additional information, see the *RSWeb.NET* chapter.

Email Info

Max Attachment Size: To limit the size of the attachment, you can enter a maximum size in kilobytes here. When set to zero, there is no maximum size.

Additional message added to the end of the notification email: Enter any text to be added to the email. There is no limit to the length.

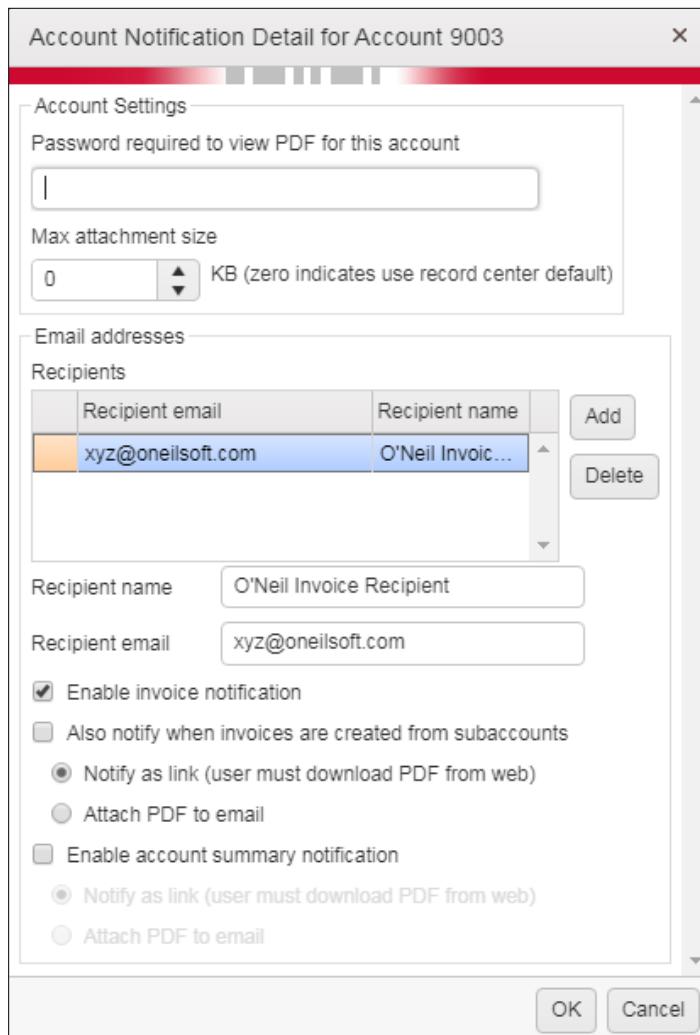
PDF Owner Encryption Password

When attaching the invoice to the email, the PDF is encrypted. The encryption includes two passwords: owner (required) and recipient (optional). The owner password allows full modification of the PDF, while the recipient password does not. The PDF is only encrypted when sent as an attachment to an email. When downloaded from RSWeb.NET or O'Neil Order, the PDF is not encrypted. The default password is "rssqloneil42".

When all information has been entered, click **OK** to save and close the dialog box.

Account Setup

To set up notification for individual accounts, in the **Account** grid, right click the account you want, and select **Notify**.



Password required to view PDF for this account: Enter the password that the recipient must use to view the PDFs attached to emails. It can be left blank, in which case the recipient would not have to enter a password to view the PDF. When using a link to download the PDF from RSWeb.NET, this password is not used.

Max attachment size: Enter the maximum size in kilobytes allowed for the PDF if attached to an email. The smaller of the size entered here and the size set up for the record center is used to determine if the PDF is too large. Enter zero to indicate that the record center value should be used. The default is zero.

Email Addresses

This is the list of all recipients that should be sent the invoice and/or invoice account summary PDF attachments/links. Click **Add** to add a new recipient.

Recipient name: Enter the recipient's name.

Recipient name: Enter the email address of the recipient. When you tab out of this field, the name and email appear in the Recipients list.

Enable invoice notification: Select this check box if this recipient should be notified when an invoice PDF is ready.

Also notify when invoices are created from subaccounts: Select this check box if this recipient should also be notified when invoices are created from subaccounts.

Notify as link (user must download PDF from web): Select if you want to send email with a link to download the PDF from the web.

Attach PDF to email: Select if you want to attach the PDF to the email, as long as it doesn't exceed the maximum attachment size. This field is only enabled if the Attach invoice to email option in the **Account Notification Settings** dialog is enabled.

Enable account summary notification: Select this check box if this recipient should be notified when an account summary is created. This option is only available for level 1 accounts.

Notify as link (user must download PDF from web): Select if you want to send email with a link to download the PDF from the web.

Attach PDF to email: Select if you want to attach the PDF to the email, as long as it doesn't exceed the maximum attachment size. This field is only enabled if the Attach invoice to email option in the **Account Notification Settings** dialog box is enabled.

To delete a recipient from the list, select the name and click **Delete**.

When you have finished entering data, click **OK** to save and exit the dialog box.

Authorized List

O'Neil Stratus allows you to keep a grid listing all the people in your client's company who are allowed to order services and supplies. This Authorization List is not required, and you may list just their names, or you may require that they give passwords when placing an order. You may set the system to require a password through the **Force Authorization** option in the **Account Add/Edit** dialog box (see Force Authorization section above, and Authorized Lists section in the Setup chapter).

Right click on an account and select Authorized List. The **Authorized List** grid for that account appears with all authorized people loaded onto it. You can add, edit or delete names in this grid.

Record Storage Authorized List				
Options Search Format Mark Clear				
				
Account Code	Last Name	First Name	Password	
1	1000	Smith	Calvin	calvin
2	1000	Smith	Mary	mary

Customer Service Instructions

This option accesses a free text box that you can use to enter special instructions for this account. This box and the instructions for the account appear when a workorder is generated or edited for this account.

Right click on an account and select **Instructions**.

Customer Service Instructions for 1000



Only deliver on Mondays, Tuesdays and Fridays. All other days are rushes.

Current line: 1 Total lines: 1

Edit Cancel

Address

The **Address** option allows you to view and edit all the addresses that are associated with the selected account. When you fill out the Mail Address and Pickup/Delivery Address fields in the **Account Add/Edit** dialog box, those addresses are added to this **Address** grid. They are called Default Mail Address and Default Pick/Del Address. To access the **Address** grid, right click on an account and select **Address**.

Record Storage Address						
Options		Search		Format		Mark
						Clear
Account Code	Description	Contact	Address Line 1	Address Line 2	Addre	
1 1000	Default Mail Address	Jim Smith	4980 Barranca Pkwy	Irvine, CA 92604		
2 1000	Default Pick/Del Address	Jane Hutter	4980 Barranca Pkwy	Irvine, CA 92604		
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		

To add another address, right click anywhere in the grid and select **Add**. You are asked to name these addresses so they can be referenced and chosen in the workorder function.

Pickup/Delivery Address Add X

Description

Account

Level 1

Level 2

Level 3

Pickup/Delivery Address

Contact

Address

Phone

Fax

Route

Stop Group

Latitude ▲
▼

Longitude ▲
▼

Add Cancel

Delete

Use the **Delete** menu option with extreme caution. When **Delete** is selected, the focused account, all its containers, filefolders, tapes, and activity history is deleted from the system. We suggest that you turn this menu option off for all users. If you ever need to use it, you can turn it on for yourself, use it and turn it off again (see *Security/User Access* chapter).

Account Ranges

Description Account Ranges

The Record Storage program identifies items being introduced to the system by their barcode numbers. Each Account is given a range of barcode numbers that has been assigned to it through the system. Then, before the customer sends a container or filefolder to you, he places a barcode label on it, and the system recognizes it as his.

When assigning new barcode ranges to an Account, we suggest that you have the labels in hand, and differentiate them until they can be properly distributed to your clients. The program does not allow you to assign the same number twice.

From the **Administration** menu, select **Account Range** to access the **Account Range** grid. From here, you can load established ranges to see who has what, edit or delete them, as well as add new ranges to the system. To add a new range, right click anywhere in the grid and select **Add**.

The screenshot shows a software dialog box titled "Account Range Add". At the top, there is a section labeled "Account" containing three dropdown menus for "Level 1", "Level 2", and "Level 3". Below this, there are four input fields: "Object Code", "Begin Code", and "End Code", each with a small icon to its right. At the bottom of the dialog are two buttons: "Add" and "Cancel".

Account Level

When working with an Account that has different levels, you must treat the different Accounts completely independently. Even if they are in the same facility, Accounts *cannot* share barcode labels. Therefore, when

assigning label ranges, be sure to fully define the Account with all its Levels entered. (See [Account Set Up](#) chapter for more information on Account Levels.)

Object Code

If you are creating a range of barcodes for Containers of any type, choose Container as the Object Code. Likewise, regardless of the type of Tapes you are creating a range for, choose Tape as the Object Code. If you are creating a range of barcodes for Filefolders, choose Filefolder, for the Object Code. The Container and Tape subtypes are defined by the Location they are first assigned to or when they are edited (see [Locations](#) chapter for more information on Location Type determining Object Code).

Begin / End Code

When entering the barcode range, you must enter all characters, including leading zeros. Even if you have assigned two barcode lengths to Containers or Filefolders, you must enter the same number of characters in both fields. If you need to enter two different character lengths, just enter multiple ranges for the same customer.

NOTE: Assigning a range of Container Numbers does not limit a customer to those numbers. If a barcode on a container is somehow destroyed and replaced by a number outside the customer's range, the container will retain all of its previous descriptive information (even if the new number was previously assigned to another client).

CAUTION! Be sure you don't order or print duplicate labels by requesting overlapping ranges! Be sure that the range of labels you set up for a client actually exists and that those labels get to the right client!

Locations

Locations

Locations are the places where you keep the items you store for your clients. Each location is represented by a barcode number (Location Code) in the system. Each location is set up in the system with certain criteria assigned to it. The criteria help the system to determine how to treat the items placed in the location, and when an error is made by an operator. Locations can be assigned to an account - but don't have to be. Locations must be assigned an object type, but it can be as generic as "Item" or as specific as "1.2Cu.Ft Container". Locations must be assigned a capacity so the system can determine when a location has reached and exceeded its capacity. Locations can also be assigned to a building, a floor and/or a room - but don't have to be.

Object Type

O'Neil Stratus uses the object type to determine how to treat an item being scanned into a location. There are three levels of object types.

Level	Object Code
Level 1	Item
Level 2	Container, Tape or Filefolder
Level 3	Any more detailed codes for items that you have created in the Sublist grid for a level 2 object. These further describe types of containers or tapes. Filefolders do not have subtypes.

O'Neil Stratus can differentiate types of Containers and Tapes as they enter your facility by the Location into which they are first placed. For example, when ABC Corp. sends in a container for the first time, all the system can tell by scanning the barcode is that the barcode number length is for a container, and that the barcode number has been assigned to ABC Corp. When you scan the container into a Location that has been set up for 1.2 cubic foot containers, the system then assigns that Object Subtype to the Container.

However, O'Neil Stratus also allows you to set up locations that are more generic if you prefer. Referring back to the Objects and Object Subtypes set up in the system, you can assign any level of object to a location. If you assign the object code "Item" to a location, anything can be scanned into that location (any size container, any kind of tape or filefolders). However, if the item is new to the facility, the system is not able to assign an object code more specific than Tape, Container or Filefolder to the item for billing purposes (the object code at that level is defined by the number of characters in the barcode).

Locations assigned different object types treat items differently. Please keep the following object types in mind when setting up locations.

Object Type assigned to the Location	How the system treats items being scanned into the location
--------------------------------------	---

Item	Anything can be placed into this location. If the item already has an object subtype assigned to it (Container subtype or Tape subtype), the item's object code does not change. If the item is new to the system, the system determines the number of characters in the item's barcode and assigns it the appropriate object code (Container, Tape or Filefolder). It is not given a subtype item code.
Container	Any type of container can be placed in this location. No tapes or filefolders can be scanned into this location without generating an exception. If the container already has a subtype assigned to it, it is not changed. If the container is new to the system, it is assigned the object type "Container." If you want it to have a subtype, the information has to be entered into the system either through the RSMobile scanner when it is scanned, or through the Container Edit dialog box.
Container Subtype	The only item that can be scanned into this location without generating an exception is a container without a subtype, or one with the exact subtype as that assigned to the location. Any other item generates an error in the system, and the object type assigned to the location is assigned to the container. The container's object type is changed.
Tape	Any type of tape can be placed in this location. No containers or filefolders can be scanned into this location without generating an error. If the tape already has a subtype assigned to it, it does not change. If the tape is new to the system, it is assigned the object type "Tape." If you want it to have a subtype, the new object code has to be entered into the system either through the RSMobile scanner when it is scanned, or through the Tape Edit dialog box.
Tape Subtype	The only item that can be scanned into this location without generating an exception is a tape without a subtype, or one with the exact subtype as that assigned to the location. Any other item generates an error in the system. If the item being placed in this location is a tape of another subtype, the tape subtype assigned to the location is assigned to the new tape. The tape's object type is changed.
Filefolder	Only filefolders can be placed in this location. Any other items scanned to this location generate an error.

As you can now see, we have shown you two ways that the system can determine what an item is: the location in which it is scanned and the base object type that it is assigned by the number of characters in its barcode. There is also one other way, and that is manually, either through the **Item Edit** dialog box, or through the RSMobile scanner (for more information on assigning item types through RSMobile, see the Record Center Ops section of the *RSMobile* chapter). Of these three different ways, the program gives precedence in the following order:

Location - Item Type – RSMobile/manual entry

If a location is assigned an object subtype, any item scanned into the location assumes the subtype as well (assuming it has the same base object type - Tape, Container - if it does not have the same base object type, the move is not allowed). The object's subtype cannot be changed without moving the item to a different location.

If a location is assigned a Base Object type (Container, Filefolder, Tape), any item scanned into the location maintains its subtype (if it has one). The barcode length of the item determines what Base Type of item it is. (Scanning a tape into a location set up for containers generates an error that must be fixed. The move does not take place in the system.)

If a location is assigned the object type "Item" the items scanned into it assume an object type generated by the number of characters in their barcodes. Object subtypes can be assigned to these items with the RSMobile scanner or through data entry.

Exceptions

RSMobile processing exceptions are generated when O'Neil Stratus finds a conflict in the three type determining factors: Location Type, Item Type (barcode length for new items, current type for existing items) and RSMobile/manual entry.

Types Incompatible

For example, if a location is assigned an object type of "Container" and a filefolder is scanned into it, a "Types Incompatible" error is generated. The system cannot accept that move.

Types Different

Or, if a location has a subtype of "1.2Cu.Ft Container" and a container with an object type of "2.0CuFtContainer" is scanned into it, a "Types Different" exception is generated. Since the location's object type takes precedence, the container's subtype changes in the system.

Object Type Ignored

If the RSMobile scanner scans a Tape (determined by its barcode length), but the user enters into the scanner that he scanned a Container, the "Object type ignored" exception is generated. The RSMobile manual entry is ignored by the system, and the item retains the "Tape" object type.

Or, if a container is scanned into a location that is assigned an object subtype of "1.2CuFt" and the user enters "2.0CuFt" through the RSMobile scanner, the "Object type ignored" exception is generated. The RSMobile manual input is ignored by the system, and the item retains the 1.2Cu.Ft. object type.

Or, if a container already has an object subtype of 1.2Cu.Ft. and the RSMobile user says that he is scanning a 2.0CuFt. container, the Object Type Ignored exception is generated and the item retains its 1.2Cu.Ft. description.

Scan Order

When scanning items into locations that hold different types of items, you must be aware of how the scanner reads the entries. An operator may be tempted to scan the location once, and then proceed to scan all items in the location as follows:

90000	Location
1000001	Container
1000002	Container
20000001	Filefolder
10000002	Filefolder
1000003	Container

However, if scanned in this order, the system sees the filefolders as being scanned into container 1000002. To ensure that the filefolders are scanned into the location individually, you need to scan the location, then the containers, scan the location again, and then the files. Or you could simply scan the location, then all the filefolders, and then all the containers. The same applies to tapes that are in or out of containers.

It is important that you define the Locations in your record storage facility to reflect the different types of Objects that will be placed in them. You can establish Locations individually or by range. Adding a range is clearly more efficient when adding more than one or two locations.

Adding an Individual Location

To add an individual location from the **Administration** menu, select **Location**. Right click anywhere in the **Location** grid and select **Add**.

Location ADD	
Location Code	<input type="text"/>
Location Description	<input type="text"/>
Object Code	<input type="text"/>
Capacity	0
Current Quantity	0
Account	
Level 1	<input type="text"/>
Level 2	<input type="text"/>
Level 3	<input type="text"/>
Building	<input type="text"/>
Floor	<input type="text"/>
Room	<input type="text"/>
Location Holding Area	No
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

Location Code

Enter the barcode number that appears on the label you affix to this location. It can include numerical and/or alphabetical characters. It must be the same number of characters as you assigned in Barcode Lengths (see Barcode Lengths section of the *Maintenance* chapter).

Location Description

This is a free-text field that you can use to best describe the Location or range of Locations that you are adding. It holds up to 15 characters and can be useful in searching and reporting. However, if you do not think it serves any purpose in your database, you may leave it blank.

Object Code

Click the grid picker next to this field to display all Objects and Object Subtypes that can be stored in a Location. These objects include the standard Filefolder object that comes with the system and any Container and Tape Sub-items that you have defined. You must determine the type of item that you will store in this Location. This is critical, since the system assigns this Object Code to all items being introduced to the system through this Location.

Capacity

O'Neil Stratus allows you to store more than one object in a location. Depending on the shelves and the size of the item being stored, you can store any number of items in a location. For example, it is common to hold nine 1.0 or 1.2 cubic foot containers in a location (3 high, 3 deep). Enter the maximum number of items that can be stored in this location. Be sure that you enter an accurate number here. This is a powerful field when searching for items and double-checking your work.

Current Quantity

Do not enter anything in this field. The system automatically updates this field as items are scanned into this location.

There is a system-wide RSWIN.INI option named Options.AccessLocationCurrentQuantity. The default setting for this option is Yes, which allows this field to be edited. If this option is set to No, the field is disabled and cannot be modified by the user.

Account - Level 1, 2, 3

You may want to assign a Location or Range of Locations to a specific account. Be sure to include all applicable Account Levels. If another client's container is moved to an assigned Location, the system accepts the move, but it shows on the Exception report as a filing error. If you do not want to assign your Locations, leave this field blank.

When a Location is assigned to a specific account, only that account's items can be stored in that location without creating an exception. This is true even within account levels. For example, if you assign a Location to Level 1 Account "ABC Corp.," Level 2 Account "West," only ABCCorp\West's items can go in that area. ABCCorp's items cannot be stored there; neither can ABCCorp\East's.

Building / Floor / Room

These 4-character free-text fields allow you to differentiate and more accurately describe this Location(s) if it is in a separate building, on a specific floor, or in a different room. They are useful for searching, sorting, and reporting. Workorders and printed picklists are sorted by Building, Floor and Room.

Holding Area

O'Neil Stratus allows you to identify Holding Areas in your storage facility with a barcode number to more accurately trace the movements of objects. Holding Areas, like any other location, can be assigned any object type. If a container or tape is placed in a holding area as its first location in your facility, it is assigned whatever Object Type or Subtype the holding area is assigned.

O'Neil Stratus makes decisions about the processing of items based on their current status and to what type of location they are moved: in-coming and out-going holding areas, and normal locations.

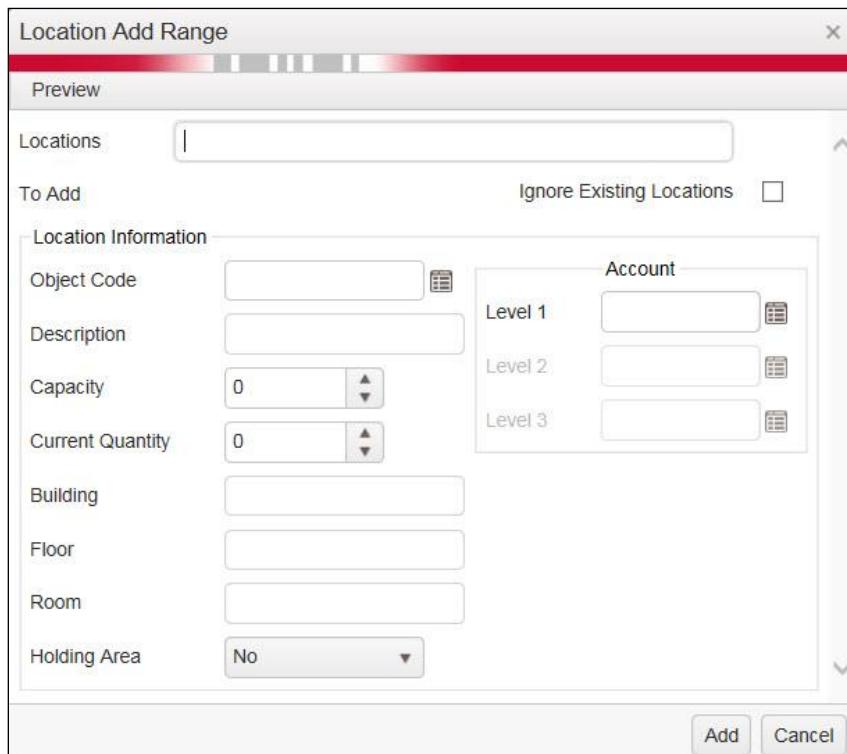
These rules can be summarized as follows:

Status	New Location	Processing Decision
In	Normal Location	Move (no status change)
In	Out-going Holding Area	Move but generate Exception (i.e., this is an operational error.)
In	In-coming Holding Area	Move (no status change)
Out	Normal Location	Refile (change status to In and update Location)
----	Normal Location	Add
Out	Out-going Holding Area	Move (no status change)
Out	In-coming Holding Area	Refile (change status to In and update Location)
----	In-coming Holding Area	Add (object type unresolved until moved to Normal location)
----	Out-going Holding Area	Exception

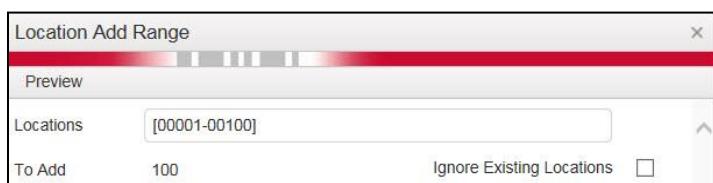
* Don't forget that the status of an item is changed in the system as soon as the workorder requesting the change is generated. Therefore, when a container is supposed to be leaving the facility, its status has already been changed to Out.

Adding a Range of Locations

To add a range of locations, in the **Location** grid from the **Options** menu, select **Add Range**. The **Location Add Range** dialog box appears.



The top of the dialog box is slightly different; however the remainder of the dialog box is the same as in the **Location Add** dialog box.



Locations: Enter the range of locations you want to add. For detailed information and examples on how to enter Location ranges, see the *Location Range Language* section.

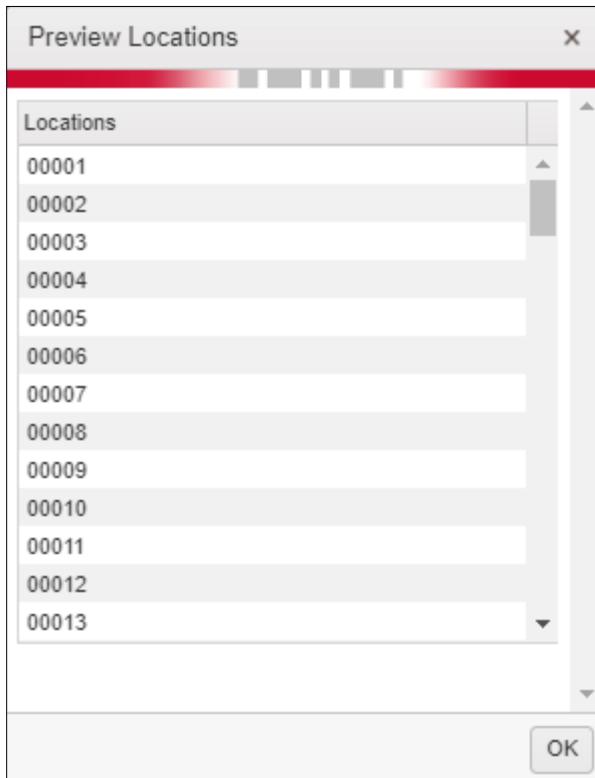
To Add: As you type in your range in the Locations field, the number of locations that will be added is displayed.

Ignore Existing Locations: This is a verification option that makes sure you are aware of any existing Locations within the range of Locations you are adding.

By default the check box is not selected, which means the system prompts you at each existing location it encounters, asking you if you are aware of its existence. When this check box is selected, the system will ignore any Locations that already exist within the range you are adding. Regardless of your choice, the system will not change the information associated with an existing Location, but adds your Location range around it.

Preview

The Preview feature lets you verify the locations are added. Click **Preview** to display all locations that will be added.



Click **OK** to close the dialog box.

Verify Location Language

When you have completed all fields, click **Add** to add the range of locations. The system verifies that the language used in the Locations field is correct.

Any errors, like unmatched square brackets or invalid lengths, are displayed. You will need to correct any errors before the locations can be added. The possible errors are:

Out of memory: You don't have enough memory to perform the calculations. Contact your system administrator or O'Neil Technical Support for help.

Unexpected bracket: A closing bracket occurred with no opening bracket.

Unexpected character in group: An open bracket or dash right after an opening bracket. Like “[-10]” or “[01]”

Invalid group: A “from” without a matching “to” was encountered within a group, possibly something like: “[00-]”.

Missing bracket: An open bracket was not closed, like “[00-10]”.

“From” and “to” have different lengths: The “from” and “to” components of a group must have the same length. An example of a wrong entry would be: “[0-10]”.

“From” and “to” are not related: Alphabetic and numeric characters in “from” and “to” do not match. Like “[A1-29]”.

“From” is larger than “to”: Example: “[99-00]” or “[Z-A]”.

Group parts have different lengths: The components in one group have different lengths. Like "[0,10,200]".

Invalid length: Not a valid location barcode length.

Location Range Language

The Location Range function uses a special language that allows you to add ranges of locations that include alpha-numeric values and numeric locations that don't necessarily follow strict number logic. When you read the following examples, you will come to understand the logic, and can then apply it to your own circumstances.

There is no distinction between numeric and alphabetic location ranges. They are all specified in the same field using the location range language.

Below are some examples of what you can enter into the Locations Field, and what locations you will get:

If you want to add one location, you can type:

00001

This will add that one location.

To add a simple numerical range of locations, enter the first and last location barcode numbers, in brackets, with a dash between them (no spaces).

[00001-00100]

This simple formula would create 100 locations, with numbers from 1 through one hundred, with preceding zeros.

If you want to add more than one location, you can type:

00001,10001,20001,30001

The system will add those four locations (00001, 10001, 20001, and 30001). The comma is a special character in the Location Range language. However, a simpler way to specify those four locations might be to type:

[0,1,2,3]0001

The square brackets - not parentheses () - denote that what is found between them should be placed in that position in the location barcode. The locations added are the same:

00001
10001
20001
30001

The square brackets are also special characters in the Location Range language. However, the dash can make adding ranges even easier. Another way to specify those four locations would be to type:

[0-3]0001

The dash within the square brackets denotes a from/to range. Again, the locations added are:

00001
10001
20001
30001

Now, let's say that you wanted the barcodes to start with 0 through 3, then 5, and then 7 through 9. You would type:

[0-3,5,7-9]0001

and you would get:

00001
10001
20001
30001
50001
70001
80001
90001

So you could say that the square brackets and the components within them denote a "group".

Groups can also be more than one digit, so that if you type:

[05-10]001

you would get:

05001
06001
07001
08001
09001
10001

Of course, you can still use the comma. If you type:

[05-10,12,15-20]001

you would get:

05001
06001
07001
08001
09001
10001
12001
15001
16001
17001
18001
19001
20001

Just make sure that each piece of the Group has the same number of characters. You can't type something like

[0-9,10-99]001

You can use groups any number of times and at any position in a specification. For example, you can type:

[0-3]00[1-2]0

and you would get:

```
00010
00020
10010
10020
20010
20020
30010
30020
```

Alpha-Numeric Ranges

Alphabetic character groups work exactly the same as numeric characters. If you type:

```
[A-D,F,H-J]0001
```

you get:

```
A0001
B0001
C0001
D0001
F0001
H0001
I0001
J0001
```

If you want to specify a multiple character alphabetic range, you are better off splitting each alphabetic character off into its own group. For example, if you want locations:

```
AA001
AB001
BA001
BB001
```

then type:

```
[A-B][A-B]001
```

Don't try something like "[AA-BB]001" unless you understand the implications. The "Advanced" section below explains why.

In an earlier example, you saw that you could type:

```
00001,10001,20001,30001
```

This is true, even when using groups. If you type:

```
[0-3]0001,[A-D]0001
```

you would get:

```
00001
10001
20001
30001
A0001
B0001
C0001
D0001
```

The dash only has special meaning within groups. Outside of groups, a dash is just a dash. If you type:

0-301

the system will add just one single location:

0-301

Therefore, you can easily specify locations with embedded dashes. If you type:

[A-G]-001

you get:

A-001
B-001
C-001
D-001
E-001
F-001
G-001

No special sorting order is implied by the Location Range specification. That is, the sorting order of locations is not affected by how the locations are created. If you type:

[3,2,1]0001

you would get:

30001
20001
10001

created in that order. But, if you sort them in O'Neil Stratus you still view them in the normal sort order:

10001
20001
30001

Advanced Language

There is a catch with alphabetic ranges. If you type:

[AA-BB]001

you would get:

AA001
AB001
AC001
AD001
AE001
AF001
AG001
AH001
AI001
AJ001
AK001
AL001
AM001

AN001
 AO001
 AP001
 AQ001
 AR001
 AS001
 AT001
 AU001
 AV001
 AW001
 AX001
 AY001
 AZ001
 BA001
 BB001

This may surprise you. You may have expected to get something like the following locations:

AA001
 AB001
 BA001
 BB001

There is a reason why you didn't. Consider the following:

[00-11]001

With the above groups, would you expect to get the following?

00001
 01001
 10001
 11001

Probably not. What you actually get is:

00001
 01001
 02001
 03001
 04001
 05001
 06001
 07001
 08001
 09001
 10001
 11001

This is because the second digit in the range increments from 0 to 9 before starting over at 0. This is just the way that numbers work. The same thing happens when you use alphabetic characters:

[AA-BB]001

The second digit increments from A to Z before starting over at A. If this is not what you want, then you can always split up the multiple-character alphabetic groups into more than one group. If you type:

[A-B][A-B]001

Then you would get:

AA001
 AB001

BA001
BB001

Alphabetic and numeric characters can be used in a single range. If you type:

[A1-B9]001

you would get:

A1001
A2001
A3001
A4001
A5001
A6001
A7001
A8001
A9001
B0001
B1001
B2001
B3001
B4001
B5001
B6001
B7001
B8001
B9001

Other characters can also appear in a range. If a character within a range is neither numeric nor alphabetic, then the character does not change or increment.

If you type:

[0\$8-1\$2]001

you would get:

0\$8001
0\$9001
1\$0001
1\$1001
1\$2001

If there is ever a Location Language character (alpha or numeric) that you actually want to appear in a barcode, you can use the backslash to force it to be treated as a normal character. If you want a dash to appear in your location, you can do something like the example below:

[0\8-1\2]001

With the above range you would get:

0-8001
0-9001
1-0001
1-1001
1-2001

The backslashes in front of the dashes in the range kept the dashes from being interpreted as a range separator. Leaving out the backslashes, as in "[0-8-1-2]001", would result in an error.

Security / User Access

Overview

Security is the process of controlling the access that users of the system have to the functions of the program and the objects in the database. O'Neil Stratus uses three complementary approaches to security:

- you can secure Items by assigning them a security level;
- you can secure Accounts (and therefore the items belonging to each Account) by allowing only specified Users access to each Account;
- you can specify the system Functions that are available to each user.
- Upon log in, the system notes the user entering the system and determines what access that user has within the system.

Securing Items

All items in the database can be given a Security Code of two digits, with 00 being minimum security and 99 being maximum security. Each user of the system is assigned an Item Security Code as well. The user's security code must be greater than or equal to an item's security code for that user to be able to access that item.

Securing Accounts

Users can have access to All or No Accounts by default. Once given access to "All by Default," individual accounts can then be removed from that user's access. Users can also be given "None by Default" access. Individual accounts can then be added to that user's access.

Securing Functions

When each user is set up, a list containing every function in the system is attached to the user. The default accessibility for a new user is NO to all functions, meaning that until some functions are turned on, the user will not be able to use O'Neil Stratus at all. Access to each function can be turned on and off to limit the user's ability to view database information and make changes, additions and deletions.

SUGGESTION: When formulating a security strategy for your system, remember the KEEP IT SIMPLE philosophy. If you can't think of a practical reason to set up a particular form of security within the system, DON'T! You may find that you lock users out of functions, accounts, and items inadvertently if your security scheme is too complex.

Adding Users

All users of the system need to be set up in the system, and those who use scanners need to be assigned a barcode identifier. This allows the system to report on who did what to what, and when it was done.

When you receive the program, the only User that is loaded into the system is the User Code "ADMIN" and the Password is the same as your SQL password. Only the ADMIN can add new users. Other users can edit their own information, but must know their password to do so.

CAUTION: Be sure that you do not edit yourself out of the system by:

- Forgetting a new password or user ID
- Mis-typing a new password or user ID

Users are entered into the system and their information is edited through the **User Add/Edit** dialog. From the **Administration** menu, **User** submenu, select **Users**. The **User** grid appears. To add a new user, right click anywhere in the **User** grid and select **Add**.

The screenshot shows the 'User ADD' dialog box with the following fields:

- User Code:** RALPH
- Password:** (represented by dots)
- Confirm Password:**
- Require Password Change:**
- Require MFA:**
- Last Name:**
- First Name:**
- Barcode ID:**
- O'Neil Status:**
- Dashboard Layout:**
- Alert Layout:**
- O'Neil Order:**
 - Web Order Requires Approval:** Not Available
 - Alert Layout:**
- Model Users:**

Account Model: <input type="text"/>	Web Model: <input type="text"/>
Function Model: <input type="text"/>	Material Model: <input type="text"/>
O'Neil Mobile M... <input type="text"/>	
- Notification Addresses:**

Email: <input type="text"/>	<input type="checkbox"/> Allow Notification
Next Notification: <input type="text"/>	<input type="checkbox"/> Prefer HTML Email
Notify Also User: <input type="text"/>	Notify Minimum Interval: <input type="text"/> 5
- User Policy Info:** Add Cancel

User Code

The User Code is the code the system uses to identify the user and, therefore, must be unique. This is the User Code you type in at the log in screen to enter the system, so we recommend that you use something relatively simple to type.

Password

A password is required for all user types (except Report Users). This word or combination of characters enables the system to confirm the identity of the user and access his files. Each user should have his own password, and it needs to remain confidential to ensure the integrity of the security system. As mentioned previously, when a User logs into the system, the system notes the name and password combination and accesses all the functions and accounts available to that user.

Passwords should be at least five alphanumeric characters and not obvious. They should also be changed periodically. When you type into this field, the characters you type appear as asterisks. This is to ensure that no one sees what the password is.

The ADMIN user can update passwords for any user, and when he does, the "Old Password" can be left blank. If it is provided, it must be correct, or the password change fails. Other users can only change their own passwords. They must always provide the "Old Password" or the change fails.

For more information on setting password policies, see the User Policies – Password section later in this chapter.

Confirm Password

This field allows you to re-type the password to make sure you didn't inadvertently type a wrong character. If you entered different characters in the Password and Confirm Password fields, the system warns you when you try to save your new or edited user.

Require Password Change

If selected, the next time the user logs in, they will be prompted to change their password. They must change their password to continue. This can be used when a user forgets his password. You can assign a new, generic password and select this check box. The user can then use the new password to log in and will immediately be prompted to change his password.

NOTE: In the example above, if password policies have been set up, the new password you assign when selecting this check box does not have to meet the required password policies. However, the new password the user enters when prompted to change must meet the password policy requirements.

The next time you enter your User Name and Password, you are prompted to change your password.

Change Password Information

Record Center	Irvine Record Center
User Name	JEN
Old Password	<input type="text"/>
New Password	<input type="text"/>
New Password Confirmation	<input type="text"/>
MFA Code	<input type="text"/> ?
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

Type in your old password again. Type a new password and then re-type it to confirm. Click **OK** to save the new password.

Require MFA

Select this check box if you require multi-factor authentication. The user will be required to enter an MFA code in addition to their password when logging in. For additional information see the Multi-Factor Authentication section later in this chapter.

Last Name

This optional field is for the surname of the user. The name entered here is used for searching, reporting and sorting purposes only.

First Name

This optional field is for the given name of the user. The name entered here is used for searching, sorting, and reporting purposes only.

Barcode ID

Each user of the system who will ever use a barcode scanner should be assigned a barcode ID which can be used to track their activity. The User needs to scan or type in this barcode identifier each time he conducts business with the scanner so that his work can be audited. The number of characters for this barcode identifier is set up in the Barcode Lengths section of the system. A length of two or three is recommended for this barcode. Keep a list of Barcode IDs so you can create or order barcode labels.

Language

Each user should be assigned a language.

RSMobile Password

This field is an optional password to be used only when logging onto RSMobile. The password field is free text with a maximum length of 6 characters. It is case sensitive. The only thing this password is used for is logging onto RSMobile.

User Type

User Type determines what sort of access the user will have in the system. The options available are Standard, Web User, Report User, Model User, and O'Neil Bridge User.

Standard: A Standard User is one who works in the main facility and who uses the system.

Web User: A Web User, usually a customer, can only access RSWeb.NET/O'Neil Order.

Report User: A Report User is not able to login to O'Neil Stratus directly or perform any data modification. This user type only exists so that you can use special views created for this purpose and display text in a language other than English.

Model User: A Model User is created so that other users can then reference that user for certain attributes. For more information see the section later in this chapter.

O'Neil Bridge User: An O'Neil Bridge User can only log in through O'Neil Bridge-enabled file room software. They cannot log in to O'Neil Stratus, O'Neil Order, or RSWeb.NET. Once a user is made an O'Neil Bridge User, their user type can never be changed. Any user that is any other user type can never be changed to an O'Neil Bridge User.

NOTE: User Type cannot be modified for the ADMIN user.

User Status

The User Type determines the status of the user account. The options available are Active and Inactive. For example, when a user leaves the company, you will want to make sure that his name and password are no longer used. Because his activities have been recorded by O'Neil Stratus, you are not allowed to delete the user from the system, but by making his status Inactive, you eliminate access to the system for anyone using his User Code and Password.

NOTE: User Status cannot be modified for the ADMIN user.

Account Access

This field gives the User access to all or no accounts. The options for Account Access are *ALL by Default* and *NONE by Default*. You must choose one or the other, and then edit the Account list as necessary.

NOTE: Account Access cannot be modified for the ADMIN user.

ALL by Default: When this option is chosen for a user, he is given access to all accounts on the system. If necessary, accounts can be removed from his access individually through the **Account Access** grid (described later in this section). Any accounts listed on this grid in connection with this user are no longer accessible for this user.

NONE by Default: When this option is chosen for a user, he is unable to access any Accounts. If necessary, he can be given access to individual Accounts through the **Account Access** grid (described later in this section). Any Accounts listed on this grid in connection with this user are accessible for this user.

IMPORTANT NOTE: The **Account Access** grid works differently for different users depending upon the entry in this field. Notice that if a user is given All by Default, Accounts listed in this grid are *removed* from his access. If a user is given None by Default, Accounts listed in this grid are *added* to his access.

Item Security Code

A security level can be assigned to all containers, filefolders, and tapes entering the system. When they are entered via barcode scanner, they are not automatically given a security code. Not having a security code is

equivalent to a security code of 00 - minimum security. This code can be edited through the **Container**, **Filefolder**, and **Tape** grids.

To access a container, filefolder, or tape, the user's Item Security Code must match or exceed the code assigned to the item. We don't suggest that you use 99 different Security Levels. We suggest that you establish the number of levels you require, and assign ascending numbers to them. Do not use numbers that increment by just one number (01, 02, 03, etc.). For example, if you set five levels of 00, 25, 50, 75, and 99 you will have room to add additional codes when more security levels are required in the future. Before you set up Security Codes, we suggest you read the *Security Levels* section of the *Setup* chapter.

NOTE: Item Security Code cannot be modified for the ADMIN user.

Item Security Codes are originally set up through the **Administration** menu, **Setup** submenu, **Security Level** option.

RSWeb.NET Material List

This field allows you to restrict the choice of materials available to a Web user. This only applies in O'Neil Order and RSWeb.NET, not in O'Neil Stratus.

NOTE: Material lists must be set up in the **Object** grid before they are available for selection.

Use the drop down list to select the list you want to assign to the user. If no list is assigned, all materials that are marked Public will be available to the web user. If a model user is assigned to the user, this field is grayed out.

Web users created through RSWeb.NET/O'Neil Order will inherit any Materials List setting from the Web User Admin creating the new user.

NOTE: If a Material List is assigned to a Web user, all materials on the list will be available to the web user, whether or not they are marked Public. If no list is assigned, only materials marked Public will be available to the web user.

Terms Accepted Date

This field is for use with the Terms and Conditions feature in RSWeb.NET/O'Neil Order. The field is only available for user types that can log into RSWeb.NET/O'Neil Order. It is initially blank and will be set to the current date once the Web user accepts the Terms and Conditions.

NOTE: Although standard users may be employees of the record center, they will still be prompted to accept the Terms and Conditions. If you do not want to display the Terms and Conditions for them, enter a date in the Terms Accepted Date field.

If at any time you want to force users to re-accept the Terms and Conditions, clear the acceptance date.

O'Neil Mobile Accepted Date

This field is for use with the Terms and Conditions feature in O'Neil Mobile. It is initially blank and will be set to the current date once the O'Neil Mobile user accepts the Terms and Conditions.

If at any time you want to force users to re-accept the Terms and Conditions, clear the acceptance date.

Share O'Neil Mobile Data

When this check box is selected, O'Neil Mobile uses the system-wide O'Neil Mobile encryption key for this user. This allows the user to share data; otherwise, the user-specific O'Neil Mobile encryption key is used.

The O'Neil Mobile encryption key dictates which on-device O'Neil Mobile database is used.

Contact PIN

This feature is used when your customer requires that only specific users can accept delivery or pickup of items. The customer must enter a validated PIN code in O'Neil Mobile before the driver can deliver or pickup items.

Customer personnel who are identified as “authorized receivers” for workorder items will need to be added as O'Neil Stratus Web Users and have a PIN assigned to them by the record center. They will also need to have account access down to the Workorder Account Level in order to be selected as a PIN user for that workorder.

NOTE: PINs can only be assigned to Web Users. If the customer does not want the user to have RSWeb/O'Neil Order access, then all RSWeb/O'Neil Order User Function Access can be set to No.

Enter the Contact PIN. The PIN is restricted to 4 to 6 numeric digits only. Retype the PIN to confirm and then click **Edit** to save the PIN.

NOTE: The Contact PIN field is grayed out unless Account Access is set to None by default.

O'Neil Stratus Dashboard Layout

This field determines the layout of the dashboard the user will see. Select either Operations Manager or Customer Service Representative depending on the user. If you do not want to display the dashboard, leave the field blank. For additional information see the *Dashboard* chapter.

O'Neil Stratus Alert Layout

Alerts display at the top right corner of the dashboard. There are two alert layouts available. The Operations Manager alert displays the number of Incoming Items and the number of Exceptions. The Customer Service Representative alert displays the number of Web Orders received. If you do not want to display alerts, leave the field blank. For additional information see the *Dashboard* chapter.

O'Neil Order Web Order Requires Approval

This field indicates whether the user requires approval for web orders they create in O'Neil Order. Web Order Requires Approval cannot be selected when adding a user because the user must first be assigned to an approver. Therefore, the field will initially say “Not Available”. Once you add the new user and assign them to an approver, you can Edit the user to select the Web Order Requires Approval check box.

O'Neil Order Alert Layout

Select the O'Neil Order Alert Layout you want to assign to the user. 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

If this user is to reference model users, click the grid picker next to each field to select a model user from the list. For more information on model users, see the *Model User* section later in this chapter.

Notification Addresses

The Notification Addresses are what the system uses to send messages to people when a Monitor is run or when the Event Notification feature is used.

Email: Enter an email address to be used for notifications. If no email is entered, no notification will be generated.

Next Notification: This field automatically increments the date and time of the next notification based on the number in the Notify Minimum Interval field. This field won't usually be edited, unless you want to override the value for some reason. This date/time is ignored when an Interest is marked as Urgent.

Notify Also User: You can select another user to also be notified each time this user receives a notification. You may want to notify a web user's supervisor each time the web user is notified that an order was submitted. Or you may want to designate another user to also be notified as a backup in case the first user is unavailable.

Allow Notification: Select this check box to allow the user to receive notifications. When this check box is cleared, it is similar to making the user inactive, but only in regards to notifications. If you have several users that you no longer want to receive notifications, you can quickly and easily global edit this field and stop the notifications, rather than having to edit each event interest. If this check box is selected, an email address must be entered.

Prefer HTML Email: Select this check box if you prefer emails are sent using HTML format. HTML formatting is generally easier to read and allows for better looking formatting. Text, however, is identical to non-HTML format.

Notify Minimum Interval: Select the minimum number of minutes between notifications. Notifications will be delivered at most once per this interval. Notifications during this interval are consolidated into one single delivery. (This does not apply when an Interest is marked as Urgent.)

NOTE: The Event Interest service reads user recipient information only when it starts. It ignores users that have no interest, are inactive, or do not have the Allow Notification check box selected. If you change any of these attributes, the service will need to be restarted before those changes will take effect.

User Policy Info

NOTE: The following fields are grayed out unless Password/Lockout policies have been set up.

Last Password Change: This is the last time the password was changed.

If Maximum Password Age has been exceeded based on the Last Password Change date/time, a message box displays with "Your password has expired". Click **OK** and the **Change Password** dialog displays. Type a new password, and then retype it to confirm. Click **Change** to save the new password.

If the number of warning days falls within the Password Change Warning setting, a message displays telling you that you have "x" number of days before you are required to change your password. You can change your password at that time or wait and change it later.

Last Invalid Password: This is the most recent date/time that an invalid password was entered for the user. It is blank if the last login attempt was successful.

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

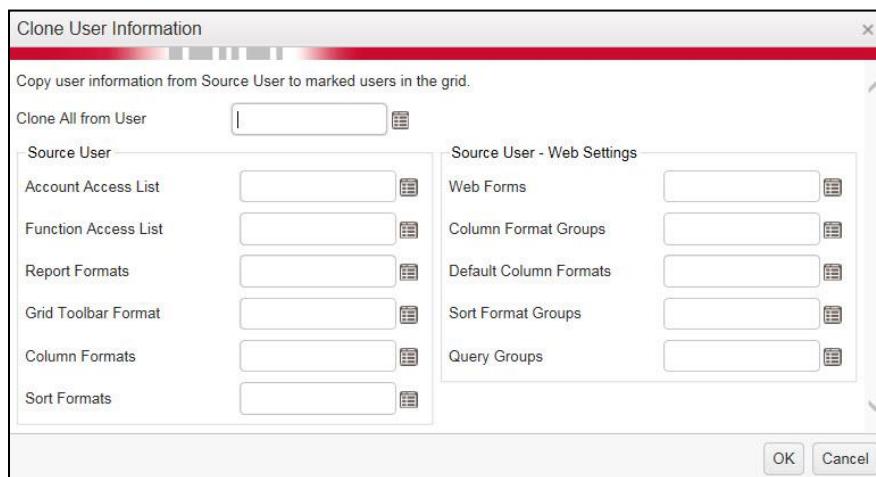
User Locked Out: This is automatically set if the user violated the Lockout Policies described elsewhere. If user is locked out, clear this check box to unlock them.

If this check box is selected and a login attempt is made with the correct password, the following message is displayed "Unable to log you on because your account has been locked out, please contact your administrator."

Ignore User Policies: You can optionally set this user to ignore all user policies. This check box is automatically selected for user ADMIN and cannot be changed.

Clone Settings

To clone information from previously set up users, select **Clone User Information**. The **Clone User Information** dialog box appears.



The Clone fields described below allow you to copy information from previously set up users to a new user. You might find it useful to set up "template" users with the standard settings for warehousemen, order entry personnel, management, etc. This way whenever you add a new employee you can clone certain information from your templates. To clone information from another user, use the grid picker next to each field to access a list of all users. Then select the user whose information you want to copy.

When you have completed all fields you want to clone, click **OK** to return to the **User Add** dialog.

NOTE: Account or Function Access List cloning cannot be performed on the User ADMIN.

To clone user information for multiple users at the same time, see the Cloning User Information for Multiple Users section later in this chapter.

Account Access List

Once you have established a user in the system, and have given him access to just the Accounts he needs access to, you may copy that list over to another user you are setting up. This enables you to set up a number of identical users without time consuming, repetitive data entry.

Even if a new employee will differ in a few Account Access areas from the "clone" setup, you could still clone one of the standard users, then modify the few specific functions that are different. This is still much more efficient than not cloning at all.

Function Access List

As you can imagine, there are many functions in O'Neil Stratus -- several hundred, in fact. Editing this list for each user can be time consuming, so O'Neil Stratus allows you to set up one Function Access List and copy it over to other users. (Editing the Function Access List is described later in this section.) Be aware that when a

new user is added to the system, all Function Access is set to No. You must set some functions to Yes before the user can do anything in the system. This can be done by cloning the Function Access List from another user, or by entering the **Function Access** grid and editing as described later in this chapter.

Report Formats

Report formats include all the information that is determined when you print a report from the system. Information included in the report formats is Query, Printer Setup, Sort Order, and Column Format. When you select a user name in this field, all the report profiles that user has saved in the system, for all canned reports, is saved for the user you are adding. Report profiles are described later in this chapter.

Grid Toolbar Format

If you have set up toolbars that are appropriate to a certain user, you can copy that toolbar format so that all the same toolbar buttons appear for this user as well. To set up the toolbar format originally, please see the section later in this chapter.

Column Formats

Column formats determine the order columns appear in grids. If you have set up column formats for a certain user, you can copy those column formats to other users. For more information on setting up column formats, see the Columns section of the *RSWeb.NET Installation and Setup* chapter.

Sort Formats

Sort formats determine the order in which data in the columns is sorted. If you have set up sort formats for a certain user, you can copy those sort formats to other users. For more information on setting up sort formats, see the Sort section of the *RSWeb.NET Installation and Setup* chapter.

Clone Web User Settings

In addition to the cloning mentioned above, you also have the ability to clone Web User Settings.

Web Forms

Custom designed data entry forms can be assigned to specific users. Those forms can be cloned for web users.

Column Format Groups

Once column formats are created, they are added to groups so they can be assigned to users. Column format groups determine what column formats are available when the user opens a grid. Those groups can be cloned for web users.

Default Column Formats

The default column format determines what columns display automatically when the user opens a grid. Those formats can be cloned for web users.

Sort Format Groups

Once sort formats are created, they are added to groups so they can be assigned to users. Sort format groups determine what sorts are available when the user opens a grid. Those groups can be cloned for web users.

Query Groups

Existing quick queries can be added to groups that are then assigned to specific users. Those query groups can be cloned for web users.

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 (standard and web)
- Web settings (forms, column format groups, sort format groups, web query groups)
- RSWeb.NET Material List (only applies to Web users)

The attributes are split into four separate categories. 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.

The Model User feature 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.

Model users can be created and used in O'Neil Stratus, O'Neil Order, and RSWeb.NET. A model user cannot, however, login.

Create Model User

Before other users can reference a model user, the model user needs to be created in the **User** grid.

From the **Administration** menu, **User** submenu, select **Users**. The **User** grid displays. Right click anywhere in the grid and select **Add** to add a new user. The **User Add** dialog box displays.

User ADD

Clone Settings...

User Code	CURTIS
Password	
Confirm Password	
<input type="checkbox"/> Require Password Change	
Last Name	
First Name	
Barcode ID	
oneilCloud	
Dashboard Layout	
Alert Layout	
oneilOrder	
Web Order Requires Approval	Not Available
Alert Layout	
Model Users	
Account Model	
Function Model	
Material Model	
oneilMobile Model	
Notification Addresses	
Email	
Next Notification	
<input type="checkbox"/> Allow Notification	
<input type="checkbox"/> Prefer HTML Email	
Notify Also User	
Notify Minimum Interval	5
User Policy Info	
Last Password Change	
Invalid Login Attempts	0
Last Invalid Password	
User Locked Out	

Add Cancel

When Model User is selected as the User Type, several fields are grayed out. Complete the available fields and click **Add** to save the model user.

NOTE: You can create several model users with different settings, so be sure to select a User Code, Last Name and First Name that will help you differentiate between them in the future.

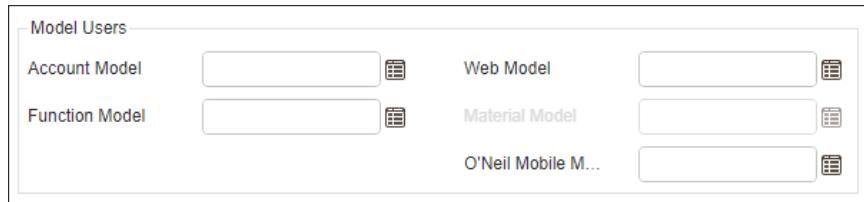
Record Storage User

	User Code	Last Name	First Name	Barcode ID	User Type	User Status	Account Access	Item
1	MODEL1	User	Model		Model User	Inactive	None by default	00

1 - 1 of 1 items

Reference a Model User

When setting up new users, you can reference a model user.



Click the grid picker next to a Model User field to select the model user you want this user to reference. Right click on the model user and select **OK** to select the model user.

Since the user is now referencing a model user, several fields that no longer apply are grayed out.

Complete the remaining fields as you would for any new user.

NOTE: The model user and the current user must have the same Account Access (All by default or None by default). If they do not, a warning is displayed and the Model User field is left blank.

Edit User Account Access

When editing the Account Access of a user that references a model user, the User Code displayed is that of the model user, not the user you are editing. The **Add**, **Edit**, and **Delete** menu options are disabled since the attributes cannot be changed when the user references a model user.



Edit User Function Access

When editing the Function Access of a user that references a model user, the User Code displayed is that of the model user, not the user you are editing. The **Edit** button is disabled since the attributes cannot be changed when the user references a model user.

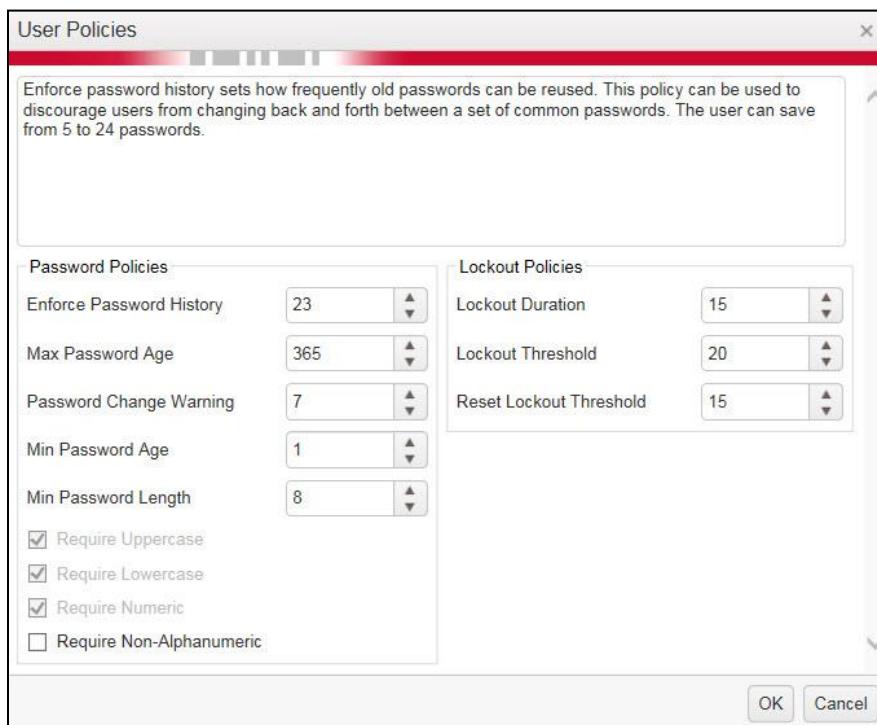
Function Access for JEN						
	User Code	Application	Menu	Grid	Item Type	Item
1	MODEL2	RSADMIN	Options\Invoice\Create	----	Menu Item	----
2	MODEL2	RSADMIN	Options\Invoice\Create	Invoice Accounts	Pushbutton	Edit
3	MODEL2	RSADMIN	Options\Invoice\Create	Invoice Accounts	Special Grid Button	Invoice
4	MODEL2	RSADMIN	Options\Invoice\Create	Invoice Accounts	Special Grid Menu	Invoice
5	MODEL2	RSADMIN	Options\Invoice\Create	Invoice Accounts	Special Grid Menu	Settings
6	MODEL2	RSADMIN	Options\Invoice\Create	Invoice Accounts	Special Grid Menu	Extended Financial Expo
7	MODEL2	RSADMIN	Options\Invoice\Create	Invoice Accounts	Special Button Access	Save Query
8	MODEL2	RSADMIN	Options\Invoice\Create	Invoice Accounts	Special Button Access	Save Format
9	MODEL2	RSADMIN	Options\Invoice\Create	Invoice Accounts	Feature Access	Create Final Invoices
10	MODEL2	RSADMIN	Options\Invoice\Create	Invoice Accounts	Feature Access	Create Draft Invoices

User Policies – Password

O'Neil Stratus includes a password feature that allows for added security. There are several system-wide options available; all of which are disabled by default. The password policy set applies to all users.

NOTE: The password policies only apply to passwords entered from the time the policies are enabled. Any previous passwords will not be checked against the password policies. Max Password Age, however, will be applied the next time users log in based on the Last Password Change date/time stored in their user record.

To set password options, from the **Administration** menu, **User** submenu, select **Users**. The **User** grid appears. From the **Options** menu, select **User Policy Settings**. The **User Policies** dialog box appears.



The top section of the dialog box describes each feature as it is selected.

Password Policies

In this section, you can set specific policies that apply to the password.

Enforce Password History: Sets how frequently old passwords can be reused. This policy can be used to discourage users from changing back and forth between a set of common passwords. The minimum allowed is 5. This means you must use 5 different passwords before you can use the first one again. The maximum allowed is 24 passwords.

Max Password Age: Determines how many days users can keep a password before they have to change it. The user is periodically forced to change their password. When this feature is used, set a value that makes sense for the specific network environment it is being applied to. Generally, a shorter period is used when security is very important and a longer period when security is less important.

Maximum password age can be set to any value from 1 to 365. Where security is a concern, good values are 30, 60, or 90 days. Where security is less important, good values are 120, 150, or 180 days.

Password Change Warning: Indicates the number of days before the password expires to start warning the user that they must change their password. This can be set from 0 to 365 days. A setting of zero will not warn.

Min Password Age: Determines how many days users must keep a password before they can change it. This field can be set to prevent users from cheating the password system by entering a new password and then changing it right back to the old one.

This can be set from 1 to 365 days. Reasonable settings are from three to seven days. In this way, users are less inclined to switch back to an old password but are able to change their passwords in a reasonable amount of time if they want to.

Min Password Length: Sets the minimum number of characters for a password. For security reasons, passwords of at least eight characters are required. The reason for this is that long passwords are usually harder to crack than short ones. If greater security is needed, the minimum password length can be set to a maximum of 14 characters.

Require Uppercase: This check box is selected and grayed out. Passwords are required to have at least one alphabetic uppercase letter (A, B, C, etc.).

Require Lowercase: This check box is selected and grayed out. Passwords are required to have at least one alphabetic lowercase letter (a, b, c, etc.).

Require Numeric: This check box is selected and grayed out. Passwords are required to have at least one numeric character (0, 1, 2, etc.).

Require Non-Alphanumeric: Select this check box to require that at least one character in the password is non-alphanumeric (!, \$, #, %).

Lockout Policies

In this section, you can set specific policies that apply when a user is locked out of the system due to a password issue.

Lockout Duration: Sets the length of time the account is locked when someone violates the lockout controls. The lockout duration can be set to a specific length of time using a value between 0 and 99,999 minutes. Zero indicates that an administrator must unlock the user.

The best security policy is to lock the account indefinitely by setting the lockout duration to zero. When this is done, only an administrator can unlock the account. This will prevent hackers from trying to access the system again and will force users who are locked out to seek help from an administrator, which is usually a good idea. By talking to the user, the administrator can determine what the user is doing wrong and help the user avoid problems in the future.

Lockout Threshold: Sets the number of invalid logon attempts that are allowed before an account is locked out. If lockout controls are used they should be set to a value that balances the need to prevent account cracking against the needs of users who are having difficulty accessing their accounts.

A primary reason users may not be able to access their accounts properly the first time is that they forgot their passwords. If this is the case, it may take them several attempts to log on properly.

The lockout threshold can be set to any value from 1 to 500.

Reset Lockout Threshold: Every time a logon attempt fails, O'Neil Stratus raises the value of a threshold that tracks the number of bad logon attempts. Once the Lockout Threshold is reached, the Reset Lockout Threshold setting determines the number of minutes the user is locked out. This threshold is reset in one of two ways. If a user logs on successfully, the threshold is reset. If the waiting period for Reset Lockout Threshold has elapsed since the last bad logon attempt, the threshold is also reset.

The Reset Lockout Threshold can be set to any value from 1 to 99,999 minutes. As with Lockout Threshold, select a value that balances security needs against user access needs. A good value is from one to two hours. This waiting period should be long enough to force hackers to wait longer than they want to before trying to access the account again.

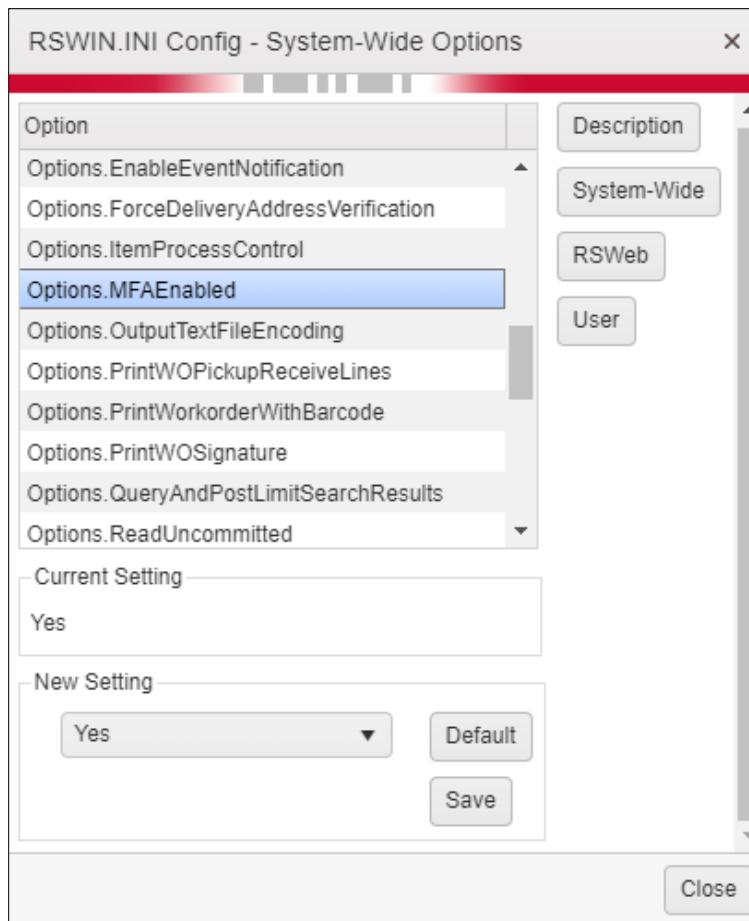
Multi-Factor Authentication

Multi-factor authentication (MFA) is a method of access control in which a user is 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 Stratus 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.

RSWIN.INI Setting

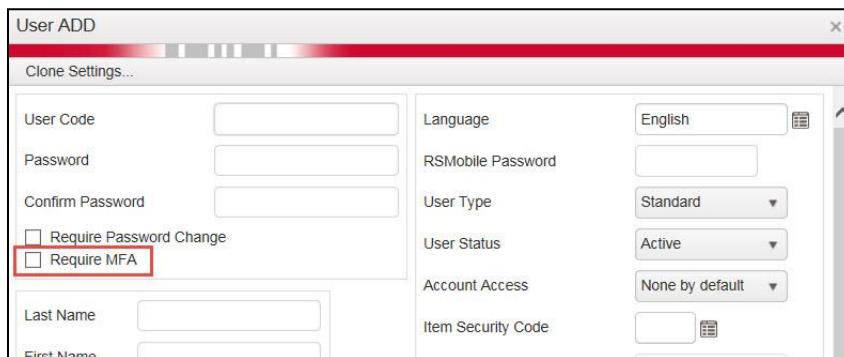
The use of MFA is optional. There is a system-wide RSWIN.INI setting, Options.MFAEnabled, to turn it on or off. By default it is not enabled.



To enable MFA, change the setting to Yes.

Enable MFA for Users

Once you enable MFA, you need to enable it for each user you want to use it. In the **User Add/Edit** dialog box there is a *Require MFA* check box.



Select the check box if you want the user to use MFA.

NOTE: You can query on and global edit the Require MFA field.

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 Stratus 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 Stratus 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 Stratus.

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 Stratus 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

When MFA has been enabled for a user, the MFA code must be entered along with the User Name and Password.

Account Information	
User name	<input type="text" value="CURTIS"/>
Password	<input type="password" value="*****"/>
MFA Code	<input type="text" value="252942"/> X ?
<input type="button" value="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 Stratus 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 tap **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

Record Center	Irvine Record Center
User Name	CAROL
Password	*****
If you use a Multi-Factor Authentication token, the token may be out of sync with our server. Please enter two consecutive token codes below to resync it.	
Authentication Code 1	<input type="text"/>
Authentication Code 2	<input type="text"/>
<input type="button" value="Resync and Login"/> <input type="button" value="Cancel"/>	

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

User Account Access

Once a user has been established in the system, and given access to All Accounts by Default or No Accounts by Default, you may edit that user's access to accounts through this grid. This is an exception list. The key to understanding the User Account Access list can be summarized as follows:

Account Access for a User

All by Default

None by Default

User Account Access List Meaning

Accounts user does *Not* have access to

Accounts user *Does* have access to

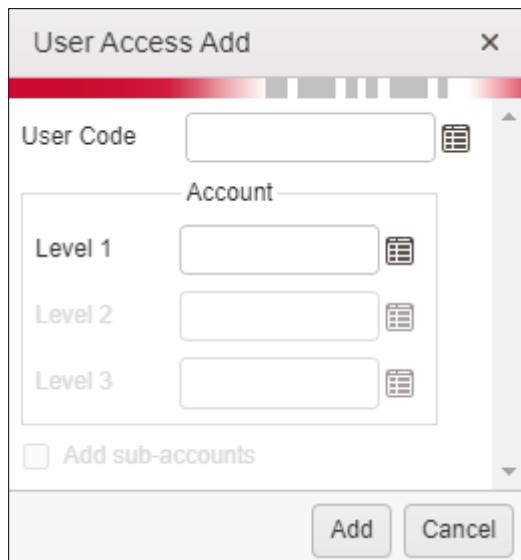
For example, suppose you setup three users, Cathy, Stephanie and Ron. Cathy is our Office Manager, and will therefore be given access to all accounts. Stephanie and Ron are new trainees who will be working in the warehouse most of the time. They will need to be entered into the system as users, and will have barcode IDs, since they use RSMobile scanners on a regular basis; however, they don't need access to accounts, since they don't work much with the system.

Cathy's name and password are entered, and under Account Access, "All by Default" is selected, giving her access to all accounts in the system. Stephanie's name and password are also entered, and under Account Access, "None by Default" is selected, eliminating her access to any account. Ron's name and password are entered in the same manner.

Now you have received a new account -- the SSIA (Super Secret Information Agency). Their records are, of course, extremely confidential, and they don't want anyone but you--you've passed special screening by the SSIA--to have access to their account. *You need to make the SSIA's account inaccessible to Cathy.*

Another account, ABC, has asked you to enter the names of all the files in 50 boxes into the system. It turns out that Stephanie types 120 words a minute, so you want her to do the data entry. Ron is pretty good too, and will help her out. *You need to make ABC's account available to Stephanie and Ron.*

You can change the account access for all of these users from the same grid -- **User Access**. From the **Administration** menu, **User** submenu, select **User Account Access**. The **User Access** grid appears. Right click anywhere in the grid and select **Add**.



Enter Cathy's User Code in the first field, then the SSIA's Account Code in the second field. If you want to also include all sub-accounts, select the *Add Sub-accounts* check box. By default, the check box is not selected.

Click **Add**. Then enter Stephanie's User Code in the first field and ABC's Account Code in the second and click **Add**. Do the same for Ron. When we close this dialog box, all three of the users appear on the grid, along with the Accounts whose access has been changed.

The accounts listed on this grid have been added to or removed from the Users' access.

Record Storage User Access		
	User Code	Account Code
1	CATHY	SSIA
2	RON	ABC CORP
3	STEPH	ABC CORP

The grid above shows that the SSIA has been removed from Cathy's access and ABC has been added to Stephanie's and Ron's.

This process can also be done individually per user through the **User** grid, **Account Access** menu.

User Function Access

Ron and Stephanie still cannot do anything in the system, because when any user is added to the system all Function Access defaults to No. Before they can complete their data entry project, you have to edit their Function Access Lists to enable them to access the functions they need.

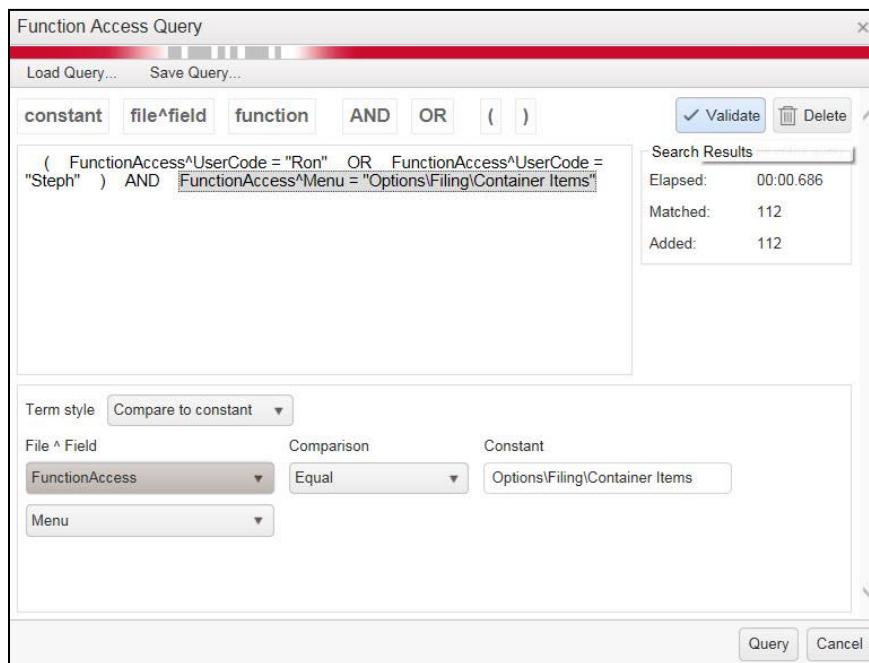
The **User Function Access** grid allows us to view and edit all functions for all users. Were we to actually load all the functions for all the users we would have a large number of items on our grid, so we use the **Load** option under the **Search** menu (see *Queries* chapter for details on this function).

Example

In the section above we gave Ron and Stephanie both access to ABC Corp. Now since they will just be editing Files and Containers for ABC, we need to give them access to the functions they will be using.

To determine which functions Ron and Stephanie will need access to, from the **Operations** menu, **Filing** submenu, select **Container Items**. As you go, write down all the functions you access.

From the **Administration** menu, **User** submenu, select **User Function Access**. In the **Function Access** grid, we want to load Functions for Ron and Stephanie (this is one query, so put it in parentheses), but not all of them. For example, we can eliminate all Administration functions. In fact, all we really need are the Container Item Functions. From the **Search** menu, choose **Load...** An appropriate query to load the Functions we need would be:



Note the parentheses. The query will not give you the results you want without them. This query gives you all functions in the **Container Items** option.

Record Storage Function Access								
		Mark						
		Mark All	Unmark All	Invert Mark	Grid	Item Type	Item	Access
51	RON	RSOPS		Mark Summary	ier Items	Filefolder Tally	Special Button Access	Save Format Yes
52	RON	RSOPS	Options\Filing\Container Items		Tape Tally	Special Button Access	Save Format	No
53	STEPH	RSOPS	Options\Filing\Container Items	----	Menu Item	-----	No	
54	STEPH	RSOPS	Options\Filing\Container Items	Container	Pushbutton	Add	Yes	
55	STEPH	RSOPS	Options\Filing\Container Items	Container	Pushbutton	Edit	Yes	
56	STEPH	RSOPS	Options\Filing\Container Items	Container	Pushbutton	Delete	Yes	
57	STEPH	RSOPS	Options\Filing\Container Items	Container	Grid Menu Item	Global Edit	No	
58	STEPH	RSOPS	Options\Filing\Container Items	Container	Grid Menu Item	Global Delete	No	
59	STEPH	RSOPS	Options\Filing\Container Items	Container	Grid Menu Item	Import	Yes	
60	STEPH	RSOPS	Options\Filing\Container Items	Container	Grid Menu Item	Print	No	

Mark the ones you want to change access to Yes. Under the **Options** menu, select **Global Edit**. Change the Access to **Yes** and click **Global Edit**.

Function Access Grid

The following is a description of each of the elements included in the **Function Access** grid. To identify the function you need to turn on or off, think of it in a hierarchical way. Start with Administration or Operations, then the Menu, the Grid, and the Item. The other columns give specifiers to help you identify the function (i.e., Item type tells you if it is a button or a menu item) or to give additional information (i.e. Access, Barcode ID and Names all further describe the User).

Columns

The default display format in the **Function Access** grid displays several columns that describe the placement, type and purpose of functions. These are described below. It may take a little practice for you to become adept at relating a particular menu item or button to its entry in the **Function Access** grid. Becoming familiar with the meaning of the column headers is a good first step. Think of each default column from left to right as qualifying to greater level of detail the particular function for a particular user.

User Code: The code the user uses to log into the system.

Application (Ops/Admin): This column says whether the function in question is under the **Administration** or **Operations** menu.

Menu: All menu items including the final menu option used to reach the grid in question.

Grid: The grid or "sub-grid" (a grid invoked by menu or button within a grid such as the **Activity** grid within the **Container** grid) that the menu item invokes. If you want to modify the options that a user has within the **Container** grid, be sure that "Container" is in the cell for the Grid column on the row representing the option you want to modify.

Item Type: How the function is accessed. Each item is either a menu item or a button, but there are different types of menus and buttons.

Item: A description of the function itself. This is typically the word that is on the button, or the text for the menu item (Add/Edit/Delete, etc.).

Access? (Yes/No): This column tells if the user has access to the Function described by the columns preceding it. Changing this determines whether the user is able to access this function in the system. This is the only modifiable field in this grid.

User Web Function Access

This option sets function access for RSWeb.NET users. By default all function access for RSWeb.NET is set to No. To allow use of an option for a user, you need to set function access to Yes.

You can set function access for an entire Web Group.

The screenshot shows the RSWeb.NET navigation pane. On the left, there's a vertical menu with sections for Home, Inventory, and Order. The 'Inventory' section is highlighted with a red box. The 'Inventory' section contains links for Getting Started, Container, Filefolder, and Tape. To the right of the menu, there are three main content areas: 'Home', 'Inventory', and 'Order'. The 'Inventory' area has a detailed description of its functions and a note about the inventory grid.

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Session will timeout in approximately 544:30 minutes.

A Web Group is listed in the **Function Access** grid with "----" in the Web Page and Description columns. If function access for a web group is set to No, the entire group is removed from the navigation pane.

Within a Web Group, you can drill down and set function access for an entire Web Page.

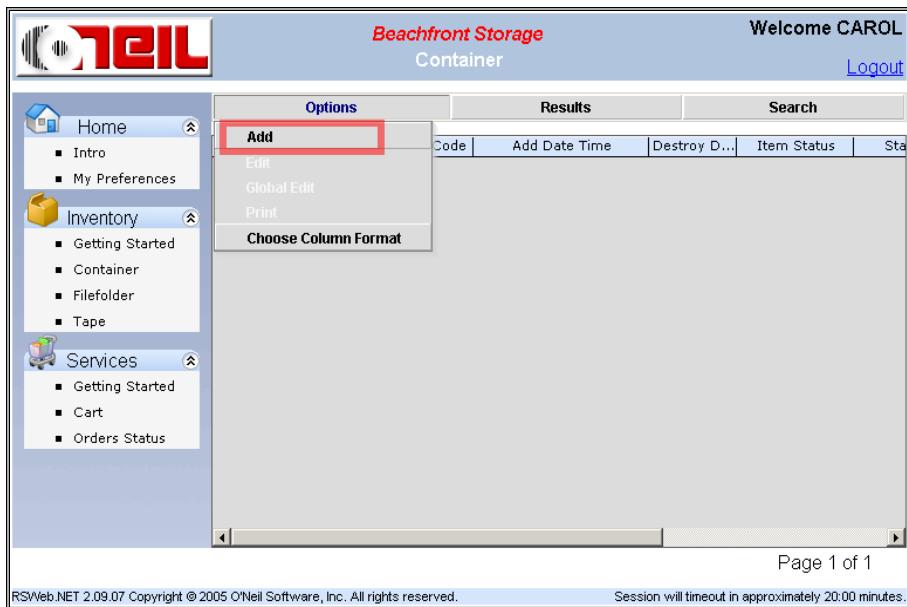
This screenshot is similar to the one above, but the 'Container' link under the 'Inventory' section of the navigation menu is highlighted with a red box. The rest of the interface is identical, showing the 'Inventory' section of the content area with its descriptive text and grid information.

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Session will timeout in approximately 542:00 minutes.

A Web Page is listed in the **Function Access** grid with "----" in the Description column. If function access for a web page is set to No, the menu option is removed from the navigation pane and the page is not available to the user.

Within a Web Group and Web Page, you can also set function access for individual options.



All available options are listed in the Description column. If function access is set to No for a description, that item does not appear in the drop down menu.

From the **Administration** menu, **User** submenu, select **User Web Function Access**. The **Web Function Access** grid appears.

Record Storage Web Function Access							
Options		Search		Format		Mark	
	User Code	User Type	Web Group	Web Page	Description	Grid	Access
1	CAROL	Web User	Inventory	Container	Add	Container	Yes
2	CAROL	Web User	Inventory	Filefolder	Add	Filefolder	Yes
3	CAROL	Web User	Inventory	Tape	Add	Tape	Yes
4	CAROL	Web User	Inventory	Container	Edit	Container	Yes
5	CAROL	Web User	Inventory	Filefolder	Edit	Filefolder	Yes
6	CAROL	Web User	Inventory	Tape	Edit	Tape	Yes
7	CAROL	Web User	Inventory	Container	Global Edit	Container	Yes

Load the users for which you want to set function access onto the grid. To edit function access for a row, right click on it and select **Edit**. The **Web Function Access Edit** dialog box appears.

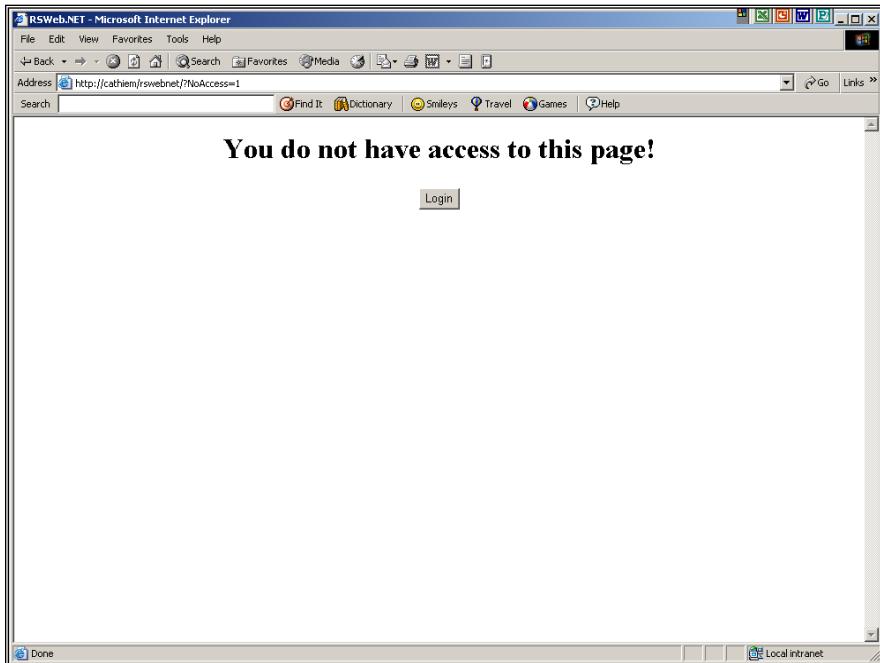
Web Function Access Edit

User Code	CAROL
User Type	Web User
Web Group	Inventory
Web Page	Container
Description	Add
Grid	Container
Access	Yes

Edit **Cancel**

Click the drop down arrow next to the Access field to change the function access. Click **Edit** to save the change. Click **Cancel** to exit the dialog box.

If a user attempts to go directly to a page he does not have access to by typing in its address, the following page appears.



The user can then click the **Back** button or click **Login** to have a different user log in that may have access to that page.

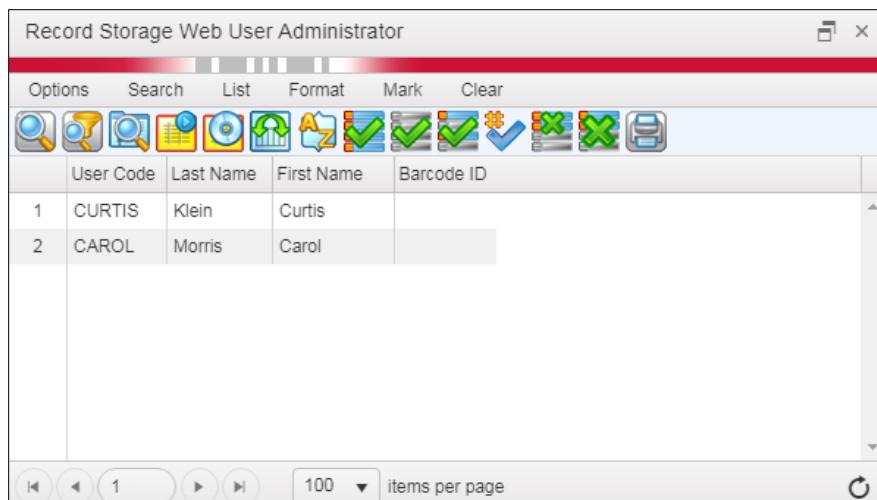
Web User Admin

Customers of the record center can manage their Web users themselves through RSWeb.NET or O'Neil Order. The record center must first set up an Administrator for the customer in O'Neil Stratus. The Administrator is then allowed to do the following:

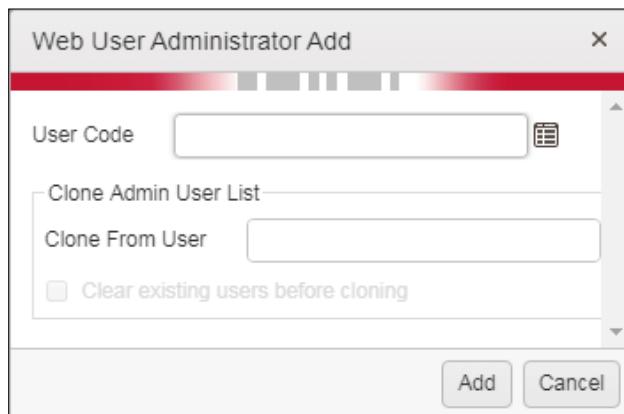
- add/modify users
- deactivate users
- delete users with no activity
- modify function access
- modify account access
- modify available reports
- cart administration

Add Web User Administrator

RSWeb.NET and O'Neil Order user administrators are set up in O'Neil Stratus. From the **Administration** menu, select **User**, and then **Web User Admin**.



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



User Code: Type the User Code, or click the grid picker to select the User Code. If a user is already an administrator, they will not show up in the grid.

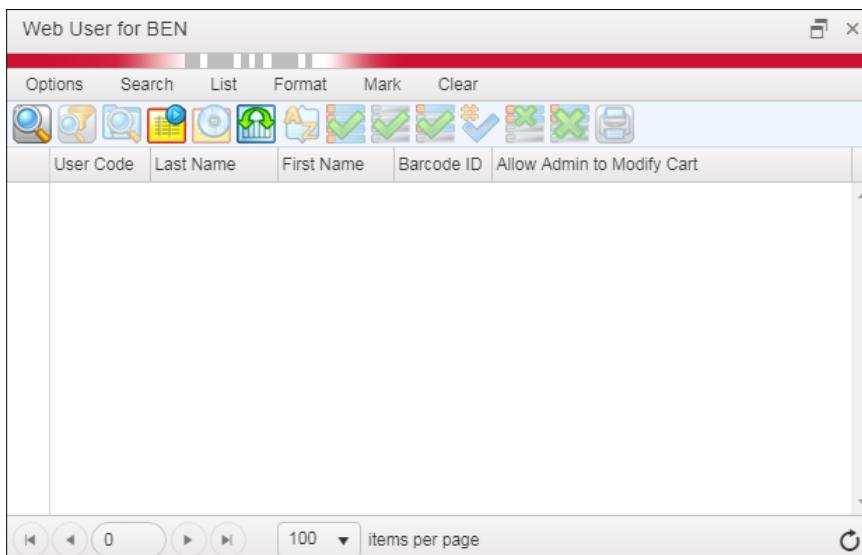
Clone Admin User List: This field allows you to clone the admin user list from one administrator to this new administrator. Click the grid picker to select the user you want to clone from. The *Clear existing users before cloning* check box is disabled since the user to be added does not yet have a user list. This field is only available when editing an existing administrator. When selected, it clears all existing users from the admin user list before cloning the new list. Otherwise, users from the cloned list will be added to any existing users.

Click **Add** to add the new administrator.

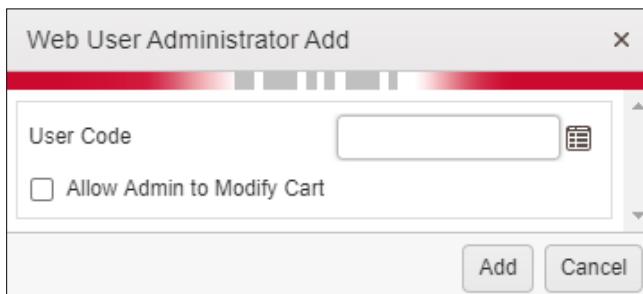
NOTE: Before the Web administrator can perform administrative duties in RSWeb.NET or O'Neil Order, function access for the User Admin menu options must be set to Yes.

Assign Users to Administrator

Once an administrator is added, users need to be assigned to the administrator. In the **Web User Administrator** grid, right click on the administrator and select **Users**.



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



User Code: Type the User Code, or click the grid picker to select the User Code. The ADMIN cannot be added to a user list. An administrator cannot be added to his own user list; however, another administrator can be added to his list. Be sure to add any Model Users you want the administrator to have access to.

Allow Admin to Modify Cart: Select the *Allow Admin to Modify Cart* check box if you want the Admin to have cart administrator rights for this user. Cart Administrators can check out items from any number of specified users. The user administrator is also able to delete items from the other user's cart and view submitted orders.

Click **Add** to add the user.

NOTE: The administrator will only be able to assign other users access to functions, accounts, and reports that he has access to. So make sure you give him access to everything that the other users will need.

View Account Access

You have the ability to view which accounts a web administrator has access to as well as the accounts the users under the administrator have access to.

From the **Administration** menu, select **User** and then **Web User Admin**.

Record Storage Web User Administrator					
Options Search List Format Mark Clear					
	User Code	Last Name	First Name	Barcode ID	
1	CURTIS	Klein	Curtis		
2	CAROL	Morris	Carol		
3	MARY	Andrews	Mary		

Right click on the user you want to view account access for and select **Accounts**.

User Access for MARY

	User Code	Account Code	Account Description	First Name	Last Name
1	MARY	4000	Hospital	Mary	Andrews
2	MARY	4000 400	Hospital/Administration	Mary	Andrews

You can also view the account access of web users assigned to the web user admin. From the **Web User Administrator** grid, right click on an administrator and select **Users**.

Web User for MARY					
Options Search List Format Mark Clear 					
	User Code	Last Name	First Name	Barcode ID	Allow Admin to Modify Cart
1	JESS	Wagner	Jess		Yes
2	WOLLY	Johnson	Wolly	07	No

Right click on the user you want to view account access for and select **Accounts**.

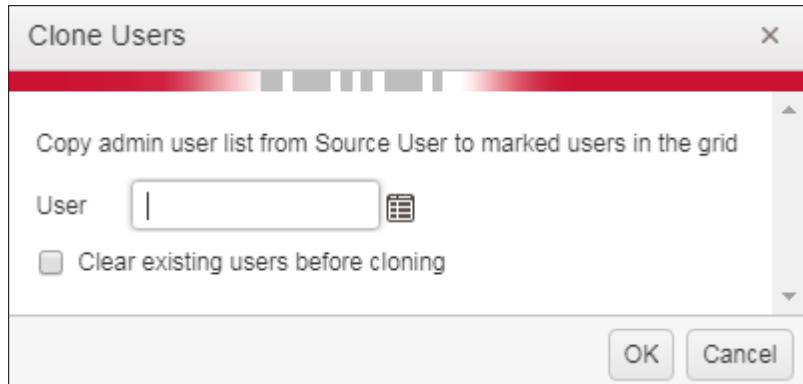
User Access for WOLLY				
Options Search Format Mark Clear 				
	User Code	Account Code	Account Description	First Name
1	WOLLY	4000\400	Hospital/Administration	Wolly

NOTE: If a user references a model user, the **User Access** grid is read only.

Clone Users

A **Clone Users** menu option is available in the **Web User Administrator** grid to clone the admin user list from one administrator to one or more other administrators in the grid.

From the **Administration** menu, select **User**, and then **Web User Admin**. In the **Web User Administrator** grid, load the users you want to clone and mark them. From the **Options** menu select **Clone Users**.

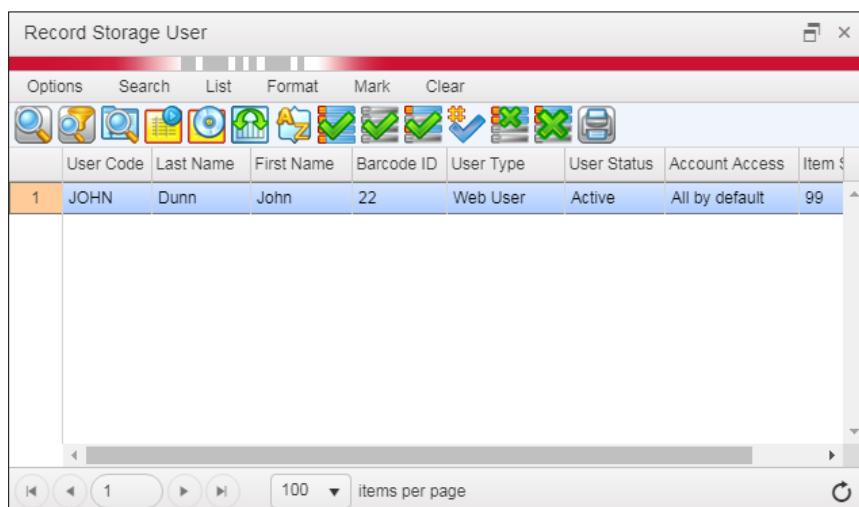


Click the grid picker to select the user to clone from. To clear the existing user list select the *Clear existing users before cloning* check box.

Click **OK** to clone the user list.

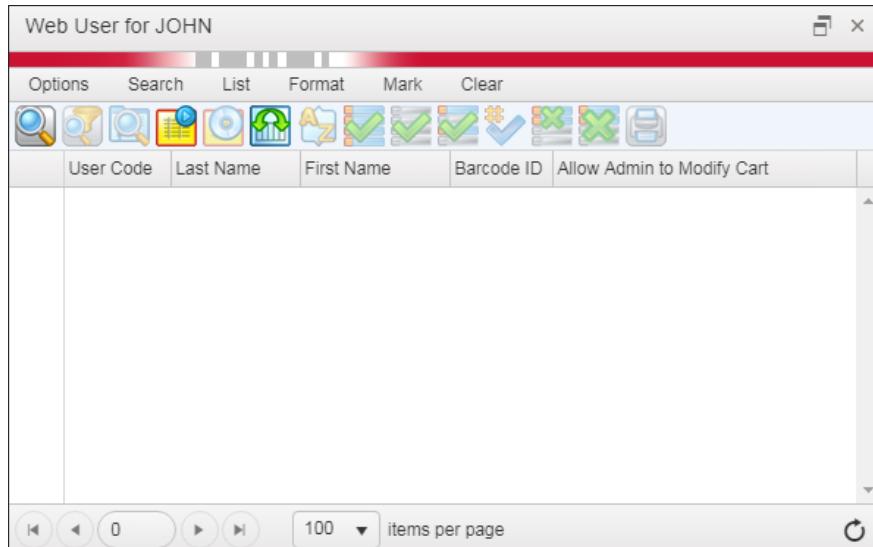
Add Web User Admin from User Grid

An administrator can also be added in the **User** grid.

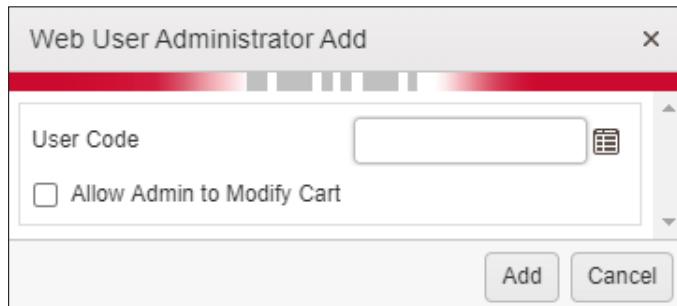


Right click on the user and select **Web User Administration**.

NOTE: If ADMIN is selected in the **User** grid, the **Web User Administration** menu option is disabled.



To add users under the administrator, right click anywhere in the grid and select **Add**. The administrator is not actually created until a user has been added.



Failed Login Attempts

This grid contains a log of all failed login attempts that have occurred.

From the **Administration** menu, **User** submenu, select **Failed Login Attempts**.

Record Storage Failed Login Attempts					
Options Search List Format Mark Clear 					
	App	Entered User Code	Login Attempt Date Time	Error	IP Add
1	O'Neil Stratus	cathie	11/30/2020 9:01 AM	Invalid password entered.	192.16
2	O'Neil Stratus	curtis	11/30/2020 9:56 AM	Invalid user code.	192.16
3	O'Neil Order	cathiem	11/30/2020 11:40 AM	Invalid user code.	192.16

The following fields are available in this grid:

Entered User Code: The code that was used to attempt the login. It may or may not be a valid user.

Login Attempt Date/Time: The Date/Time the user last attempted to log in.

IP Address: The IP address of where the login attempt was made.

Computer Name: The name of the computer where the login attempt was made. For RSWeb.NET/O'Neil Order this would be the same as the IP address unless special settings were made to IIS.

NT User: This is the user logged into the workstation. For RSWeb.NET/O'Neil Order this has the browser, browser version and operating system.

Error: The error that was returned in the failed login attempt.

App: The application where the login attempt failed.

If the Entered User Code was a valid user at the time of the attempt, the following user information is also available (otherwise these fields are blank):

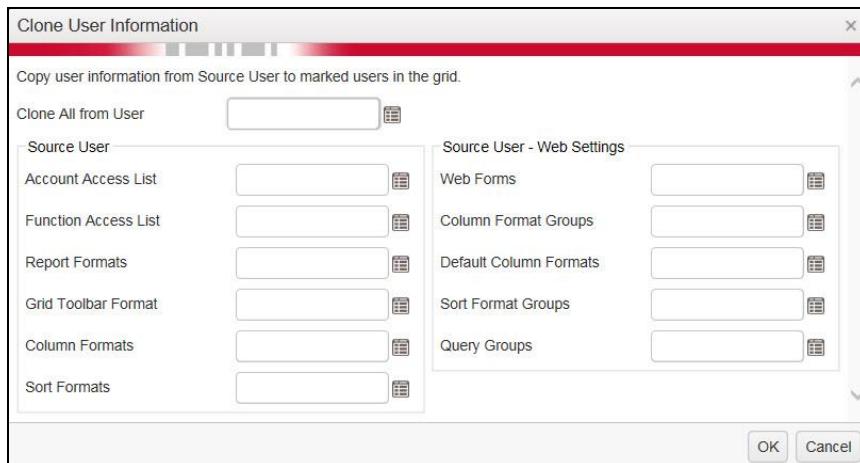
- Barcode ID
- First Name
- Last Name

User Code (Can be different from the Entered User Code if the user code of the user was changed after this login attempt occurred.)

Cloning User Information for Multiple Users

If you have several users who will be using the same settings, you can clone from an existing user.

In the **User** grid, mark the users you want to clone information to. From the **Options** menu, select **Clone User Information**. The **Clone User Information** dialog appears.

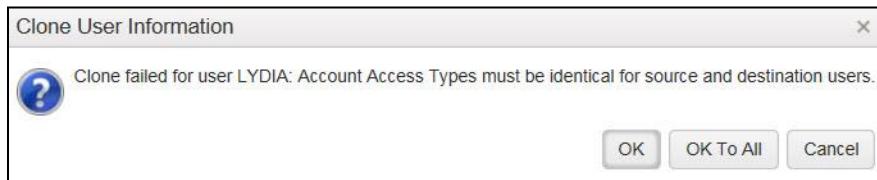


Use the grid picker to select the user you want to clone information from. If you select a user for the Clone All from User field, the remaining fields are automatically populated with that user. You can then override the individual fields by entering another user or clearing it out. If, after entering a user in the Clone All from User field, you wish to reset all the other fields to blank, you can clear the field and it will clear the rest of the fields. You can also clone Web User Settings.

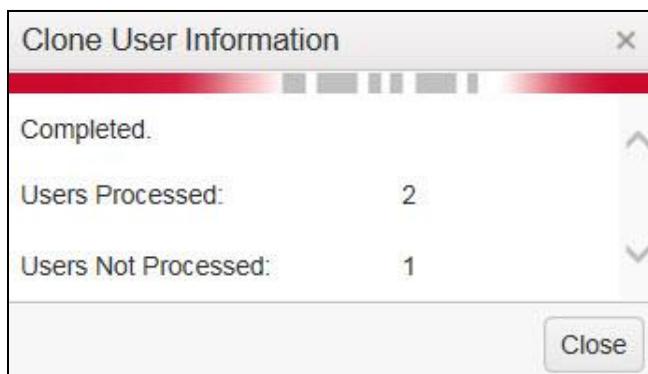
The following restrictions apply:

- When cloning Account Access, the source and destination users must both have the same Account Access Type (All by default or None by default).
- You cannot clone Account and Function access to user ADMIN.
- You cannot clone Account and Function access to a user that references a model user.
- Attempting to clone to the same user will have no effect (it is considered a successful clone, therefore no error is generated).

Click **OK** to begin the cloning process. If any users were not successfully cloned, the reason is given.



Click **OK** to continue. When finished, a message appears informing you of the number of users successfully cloned.



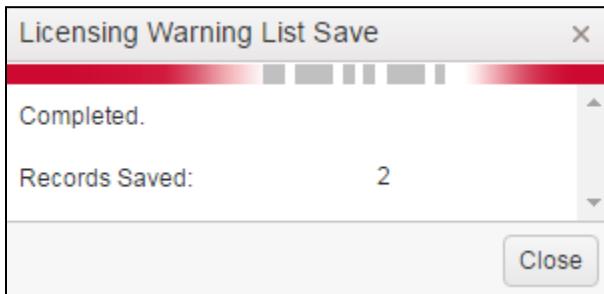
Click **Close** to return to the **User** grid.

Licensing Warning List

This menu option available in the **User** grid allows you to create a list identifying users you want to be notified when there is a licensing error of some type.

NOTE: For more information on licensing, see the *Licensing* chapter.

Load the users into the **User** grid. From the **Options** menu, select **Licensing Warning List**, and then **Save**. The following prompt appears once the list has been saved.



NOTE: Only one Licensing Warning List can be saved. If you try to save an additional list, you receive a prompt asking if you want to overwrite the existing list.

When there is a problem with licensing information, each of the users on the list receives a warning every time they log in to O'Neil Stratus until the issue is resolved. Once the issue is resolved, the warnings will stop.

NOTE: If no Licensing Warning List is created, all O'Neil Stratus standard users receive the warning messages.

The following rules apply to the Licensing Warning List:

- If the license is within 45 days of expiration:
 - If a Licensing Warning List is established, all the users on the list are warned.
 - If a Licensing Warning List is not established, all standard users are warned.
- If the license is expired or expires today, the Licensing Warning List is ignored and all standard users receive a warning message.

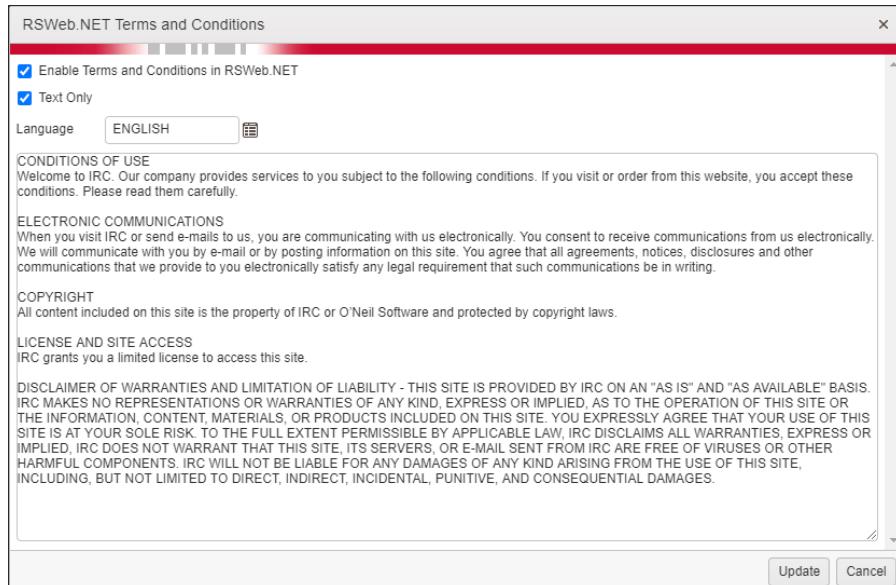
Use the **Load** and **Delete** menu options to load or delete a list.

Terms and Conditions for RSWeb.NET

A menu option is available in the **User** grid that allows you to add a customized Terms and Conditions page to RSWeb.NET. When the Web user accepts the Terms and Conditions, the date accepted is added to the Web User information in O'Neil Stratus. The next time the user logs in, they will not see the Terms and Conditions page.

Set up Terms and Conditions

From the **Administration** menu, **User** submenu, select **Users**. In the **User** grid, from the **Options** menu, select **RSWeb.NET Terms and Conditions**.



Enable Terms and Conditions in RSWeb.NET: Select the check box to turn the feature on. When enabled, the Terms and Conditions page will appear in RSWeb.NET when a user logs in. Clear the check box to turn the feature off. The check box is not selected by default.

Text Only: When selected, you can only enter plain text in the text box. If you want to use HTML to format the text, clear the check box. When plain text only is used, there is a limit of approximately 80 characters per line that will display in RSWeb.NET (varies based on the font used). When using HTML there is no limit.

Language: Terms and Conditions can be displayed in different languages. All languages previously set up in O'Neil Stratus will be available using the drop down arrow. The default language is English.

Text: This field is blank by default. Enter the text you want to appear on the Terms and Conditions page in RSWeb.NET.

To add translated text for other languages, select the language and then add the new text. Once translations have been created, when you select a language in the Language field, the translated text will appear in the text box. The initial text entered here for English will be the default text that displays if a translation isn't found for other languages that exist.

Terms Accepted Date Field

A Terms Accepted Date field is available in the **User Add/Edit** dialog. The field is only available for user types that can log into RSWeb.Net. It is initially blank and will be set to the current date once the Web user accepts the Terms and Conditions.

NOTE: Although standard users may be employees of the record center, they will still be prompted to accept the Terms and Conditions. If you do not want to display the Terms and Conditions for them, enter a date in the Terms Accepted Date field.

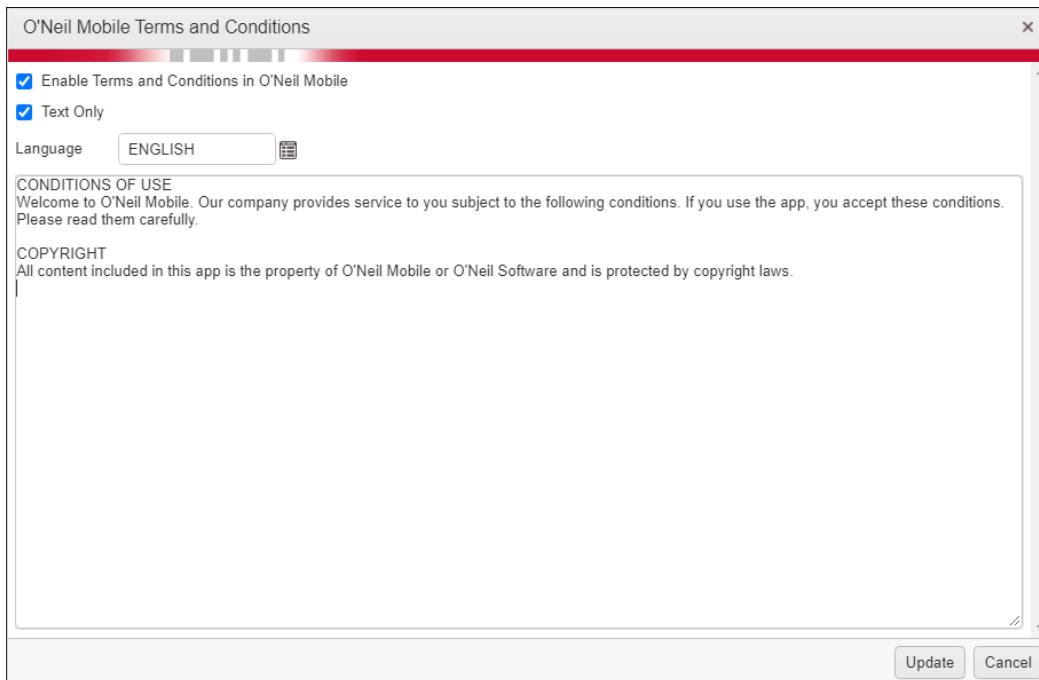
If at any time you want to force users to re-accept the Terms and Conditions, clear the acceptance date.

Terms and Conditions for O'Neil Mobile

A menu option is available in the **User** grid that allows you to add a customized Terms and Conditions page to O'Neil Mobile. When the O'Neil Mobile user accepts the Terms and Conditions, the date accepted is added to the User information in O'Neil Stratus. The next time the user logs in, they will not see the Terms and Conditions page.

Set up Terms and Conditions

From the **Administration** menu, **User** submenu, select **Users**. In the **User** grid, from the **Options** menu, select **O'Neil Mobile Terms and Conditions**.



Enable Terms and Conditions in O'Neil Mobile: Select the check box to turn the feature on. When enabled, the Terms and Conditions page will appear in O'Neil Mobile when a user logs in. Clear the check box to turn the feature off. The check box is not selected by default.

Text Only: When selected, you can only enter plain text in the text box. If you want to use HTML to format the text, clear the check box. **NOTE: HTML formatting is not currently supported in O'Neil Mobile, but will be available in a future release.**

Language: Terms and Conditions can be displayed in different languages. All languages previously set up in O'Neil Stratus will be available using the drop down arrow. The default language is English.

Text: This field is blank by default. Enter the text you want to appear on the Terms and Conditions page in O'Neil Mobile.

To add translated text for other languages, select the language and then add the new text. Once translations have been created, when you select a language in the Language field, the translated text will appear in the text box. The initial text entered here for English will be the default text that displays if a translation isn't found for other languages that exist.

O'Neil Mobile Accepted Date

An O'Neil Mobile Accepted Date field is available in the **User Add/Edit** dialog. The field is only available for user types that can log into O'Neil Mobile. It is initially blank and will be set to the current date once the O'Neil Mobile user accepts the Terms and Conditions.

NOTE: Although standard users may be employees of the record center, they will still be prompted to accept the Terms and Conditions. If you do not want to display the Terms and Conditions for them, enter a date in the O'Neil Mobile Accepted Date field.

If at any time you want to force users to re-accept the Terms and Conditions, clear the acceptance date.

Transactions

Transactions

Before you can invoice your customers, you must associate prices with the services you provide. This is done through the **Transaction** option under the **Administration** menu.

O'Neil Stratus does invoicing by collecting storage information for a client in the inventory database, and by looking at the history of services provided for a client in the activity database. Once this information is collected, O'Neil Stratus can charge for storage and services only if you have established a price for each.

In general, in O'Neil Stratus we capture activity by what was done (an Action such as Store, Sell, or Deliver), by the thing the Action affected (Std. Box, X-ray Carton, Tape, or Filefolder), and by the customer for whom it was done (ABC Corp.).

You can establish a business-wide pricing scheme using Base Transactions or pricing structures for each Account using Account Transactions. If an Account Transaction has been established for a particular Action/Object pair, it overrides the Base Transaction for the same Action/Object pair.

To establish an Account Transaction, it is not required that you establish a Base Transaction first, but remember, if you don't establish a Base Transaction for an Action/Object pair, you must establish an Account Transaction for every account if you expect to collect revenue for those services. As you set up an Account Transaction, the Base Transaction pricing (if it exists) appears in the dialog fields. This will help you to remain as consistent as possible in your pricing.

NOTE: For a complete list of all transactions that have been set up in your system, you can print a Transaction report. Generate a report that lists Account Transactions or Base Transactions through the **Administration** menu, **Reports** submenu, **Transaction** option.

Quantity Breaks

Quantity Breaks allow you to offer discounts to your clients for providing them storage or services in larger quantities (i.e., store a larger number of containers, buy more boxes, have more files delivered at a time).

Quantity Breaks can be established on Base and Account Transactions. Base Transaction Quantity Breaks take effect for all Accounts unless an Account Quantity Break has been established for a given Account.

During invoicing, the system sees how many Objects were involved with each Action, then calculates the total charge based on the Quantity Break table you established when setting up the Transaction.

Base Transactions

To create a Transaction, you start with an Action/Object pair, give it a description and, depending on the Action, customize how charges are calculated by entering the pricing structure.

To offer a better understanding of Transactions, let's look at the **Base Transactions Add** dialog box. It is accessed through the **Administration** menu, **Transaction** submenu, **Base Transaction** option. Click anywhere in the **Base Transactions** grid and select **Add**.

Quantity Break	Rate	Flat Rate
9,999,999	0.000000	<input checked="" type="checkbox"/>

As you highlight each Base Action along the left side of the dialog box, the fields change. The possible fields are described below.

Action Code

This field shows the Action Code for the highlighted Action unless it has a sub-list. In that case, any item on the Action's sub-list is available. Click the grid picker next to the field to access the sub-list.

Object Code

This field represents the object that is affected by the Action.

After you have selected an Action and an Object, you have essentially identified the Transaction to the system.

See *Actions and Objects* section for more information on setting up Actions and Objects.

Volume Billing

Volume Billing enables cubic foot billing for Storage and Services. It allows you to set up one transaction to bill for all accumulated cubic feet across many item subtypes. It also allows you to mix cubic foot charges with standard per object charges.

This field is only available if the base action is Storage, Service, Move, Priority, Validate (basically any action that has to do with items except Tracking and Status Change). When set to Yes, the quantity breaks specified in this transaction refer to each cubic foot that the item occupies rather than to each item. These transactions are referred to as Volume Billing Transactions. The transactions where the Volume Billing field is set to No are referred to as Standard Billing Transactions.

When an account is set up to use volume billing, the item related transactions are searched in the following order (the same principles apply to filefolders and tapes):

Volume Billing	+	Account	+	Container Subtype
Standard Billing	+	Account	+	Container Subtype
Volume Billing	+	Account	+	Container
Standard Billing	+	Account	+	Container
Volume Billing	+	Account	+	Item
Standard Billing	+	Account	+	Item
Volume Billing	+	Base	+	Container Subtype
Standard Billing	+	Base	+	Container Subtype
Volume Billing	+	Base	+	Container
Standard Billing	+	Base	+	Container
Volume Billing	+	Base	+	Item
Standard Billing	+	Base	+	Item

NOTE: For volume billing to apply, the Unit Volume value for the object must be greater than zero. If the value is set to zero, only the standard billing transactions are searched. Also, if an account is not set up to use volume billing, only the standard billing transactions are searched.

Examples

If you want to bill all items using one quantity break for all combined items, you would set up one Item transaction.

Using the format used above, you would set up one transaction:

Volume Billing + Account + Item

A base transaction can also be set up if you want to charge all customers the same rate.

The account must be set up to use Unit Volume Billing and all appropriate Objects must be set up to specify the unit volume.

If you also want to charge one container subtype using Standard Billing, you would set up a transaction for the subtype:

Standard Billing + Account + Container Subtype

Description

Enter a brief description of the Transaction being created. This text can be shown on invoices and reports.

Additional Amount

A fixed monetary amount automatically added on top of the totaled charges for a Transaction during invoicing.

For example, if you have delivered 15 Std. Boxes to a customer, the invoicing module might have calculated \$15.00 in charges. If Additional Amount for Deliver/Std. Box were set to \$5.00, the final tally would be \$20.00. If you had delivered only 1 Std. Box to the customer, the invoicing module might have calculated \$1.00 before applying the Additional Amount. After applying the \$5.00 Additional Amount, the final total would be \$6.00.

Quantity Break Target

The target of the Quantity Break can be either the Invoice or each Workorder on the Invoice. Generally, it is much easier to do work in bulk for a customer than to do the same amount of work a piece at a time.

For example, it would be much more efficient to deliver 20 boxes to a customer on one Workorder (and make one trip on one day), than to deliver 1 box on each of 20 Workorders (and make possibly 20 trips over 20 days).

By giving Quantity Breaks only on the Workorder level, you can more accurately relate the level of work (and therefore your cost) to the amount you bill your customer.

The default Quantity Break Target is the Invoice if you don't select one.

Accumulate (Yes or No)

When rates accumulate (Accumulate set to Yes), you charge each of the Quantity Break amounts for large quantities of Objects. When rates do not accumulate, just the rate that applies to the quantity purchased is charged.

For example, if you charge for Containers as shown in the example pricing below, and a customer orders 30 Containers, he will be charged \$1.50 for the first 10, (\$15.00), \$1.00 each for the second 10 (\$10.00) and .75 for the final 10 (\$7.50). The total cost for 30 containers would be \$32.50. If these rates do not accumulate (Accumulate set to No), the cost of all 30 containers would be \$.75 each, for a total of \$22.50.

Quantity Break	Rate	Flat Rate
1 - 10	\$1.50	No
11 - 20	1.00	No
21 - 9999	.75	No

Rate

When a Quantity Break is not appropriate to a Transaction, there is no Quantity Break table available, and you need to enter the Rate for the Transaction in this field. For example, if you are establishing a Minimum Charge for pickup and delivery service, you would choose the appropriate Action code, enter your Description, and enter your Minimum Charge amount for pickup and delivery.

Charge Type

This option is only available when the Storage action is highlighted. In order to use this function, you must turn on the Record On-site/Off-site Activity function in Account Setup – Billing Info. Refer also to the **Item On/Off Site Activity** grid shown in the **Maintenance** option under the **Administration** menu. The options available are:

In or Out – Charge by Item: This is the default and the system charges for items normally on a 30 day cycle. Note that this option causes the system to charge by item – not by day.

NOTE: The Bill Forward option (set in Billing Info) is ignored if the transaction charge type is anything other than In + Out Charge by Item.

In Days Only – Charge by Day. This option causes the system to charge only for the days in which items are in the facility. It multiplies the number of items a customer has in the facility by the number of days they were in. So if a customer has 10 containers and they were in the facility the whole invoice cycle (say, 30 days) the system would multiply 10 times 30 (300) times the daily storage rate (1.5¢) for a total charge of \$4.50. This option causes the system to charge by day – not item.

Out Days Only – Charge by Day: This option causes the system to charge only for days in which an item is out of the facility.

In + Out Days Only – Charge by Day: Using this option causes the system to charge for every day that an item is in the system, but does not have a Perm-out or Destroyed status. The item can be in your facility or in your customers – but it is charged for, regardless.

NOTE: When you choose *In Days Only*, *Out Days Only* or *In + Out Days Only*, the quantity break rates refer to days entered as days rather than items.

Rate Days

This field is non-editable. It is automatically set to 30 for *In or Out - Charge by Item* or to 1 for all other options. It indicates how the quantity break/rate should be set up.

Taxable/Surchargeable

Transactions can be set individually as Taxable/Surchargeable (Yes or No) for invoice calculation. When this option is set to Yes, and a surcharge transaction has been established, a surcharge is added to the invoice whenever the chosen action/object takes place. This field is not available for Exchange Rate.

As with all other transactions, Minimum Charge transactions can be set to Taxable/Surchargeable, but they pose special issues for consideration. With this option, it is possible for the lines that make up an invoice subtotal to be both taxable and non-taxable. If the invoice sub-total does not reach the minimum, the minimum charge amount replaces the sub-total. So, if the Minimum Charge is taxable, it overrides any non-taxable lines and tax is calculated on the minimum charge. If the Minimum Charge is non-taxable, it overrides any taxable lines and tax is not calculated on the minimum charge.

The default for this setting is taxable (set to Yes). If you change the Taxable/Surchargeable flag on a transaction to No, there is no specific indication of which lines are non-taxable on your invoices. The only way to tell whether tax is being charged on an invoice is to manually calculate the tax based on what you know should be taxable and non-taxable, or to return to the Transaction area of the program and check the transaction set up.

The Surchargeable field is included in queries in the **Base** and **Account Transaction** grids.

Quantity Breaks

Quantity Breaks are available so you can offer quantity discounts on prices for customers who give you large volumes of business. The quantity at which the break occurs is entered in this field.

Rate: The rate you want to establish for the quantity up to that listed to the left is entered here.

Flat Rate: When Flat Rate is Yes, any number of items within the Quantity Break field would be charged the amount in the Rate field.

Quantity Break	Rate	Flat Rate
1 - 10	\$15.00	Yes
11 - 20	1.00	No
21 - 9999	.75	No

Using the above example, if a customer ordered 10 containers, the cost would be \$15.00. If he ordered 4 containers, the cost would still be \$15.00. (If the Flat Rate were No and a customer ordered four, he would be charged \$60.00.)

Since the second Quantity Break is not a Flat Rate, any containers ordered within that Quantity Break amount would be charged individually. If a customer ordered 12 containers he would be charged \$15.00 for the first 10, and \$1.00 each for the additional ones (\$17.00 total).

In addition, using the example above, you could enter the transaction's quantity-breaks as:

Quantity Break	Rate	Flat Rate
10	\$15.00	Yes
20	1.00	No
21	.75	No

However, so that there is clarity for any colleagues that may also add/edit transactions, best practice when entering transaction, is to always enter the last line as the highest quantity-break possible, which is 9,999,999. For example:

Quantity Break	Rate	Flat Rate
10	\$15.00	Yes
20	1.00	No
9999999	.75	No

In the first table, the rate for a quantity over 21 is somewhat ambiguous; what is the rate for a quantity of 22? The second table more explicitly indicates that quantities of 21 and over fall within the highest quantity range and will be charged .75. Both examples are equivalent – they will charge the same when invoicing. However, always having the last line reflect the highest quantity (9,999,999) makes it clear as to what rate is charged over the previous quantity-break level.

Charging by Day – Notes

- Here are some important issues for you to consider when the Storage Transaction is set up to bill by Days:
- When the STORAGE transaction is set up to bill by days, the following Billing Info settings are ignored: Highwater (doesn't make sense), Bill Forward (doesn't make sense), Prorate (already built into the quantity), and Adjust (already adjusted by day).
- When the STORAGE transaction is set up to bill by days, the invoice prints out the Qty as the total number of days, instead of the number of items.
- The status for an item is considered to be the status it was at the beginning of the day (i.e. all subsequent status changes on the same day are ignored). When the status of an item changes, the next day is considered its actual first day.
- When an invoice is being printed for an account that has one of the Tally In/Out Days options checked in the Account Billing Information, and the date it was checked was after the beginning invoice date, a warning is displayed.

Account Transactions

When you create Transactions for individual Accounts, the process is the same as to create Base Transactions. When you are in the **Account Transactions Add** dialog box and you select an Action/Object pair, the information for your Base Transaction with the same Action/Object pair appears in the Description and Rate fields. (If no base transaction exists for that Action/Object pair, the fields remain empty.)

Discount Base

With Account Transactions, the system allows you to create individual pricing for any or all of your clients, or to offer special clients an across-the-board discount through the **Discount Base** field. This field is only available in Account Transactions, and it allows you to offer a percentage discount off of the Base Transaction for the Action/Object/Volume Billing combination. When you enter a percentage in this field, several other options disappear. These include: Rate, Quantity Break, Accumulate, and Additional Amount. This occurs because the Discount Base option informs the system to use all information from the Base Transaction, but to give a discount of the specified percentage amount across-the-board.

Account Links

If you use the Account Link option which enables one account (the Workorder Account) to access items belonging to another account (the Item Account), be aware that the Workorder Account is charged for the accesses and refiles of the items at their own rate. Therefore, the cost of accessing a specific container can be different, depending on which account ordered it. See also Account Links section of the Workorders chapter in the Operations User's Guide for more details on Account Links.

Schedule Transactions

This feature allows you to set up base or account transactions that are to be applied sometime in the future. For example, you may want to give your customer the first six months of storage free. You can set up the transaction to become effective in six months without having to remember to change the transaction at that time.

Add a Scheduled Transaction

From the Administration menu, **Transaction** submenu, select **Scheduled Transaction**. The **Scheduled Transactions** grid appears. To add a new scheduled transaction, right click anywhere in the grid and select **Add**.

The **Scheduled Transactions Add** dialog box is the same as the standard **Account Transactions Add** dialog box except the Base account can be chosen and there is an Effective Date field.

After a valid Account, Action, and Object have been entered, an attempt will be made to look up the account transaction based on the account, action, object and volume billing settings. If found, the transaction information will be displayed as the default setting. If not found and the entered account is not Base, the Base transaction will be looked up. If found, the Base transaction information will be displayed as the default. The lookup will also occur when the account, action, object or volume billing fields are changed. This is similar to the way it works in the **Account Transactions Add** dialog box except that in the **Account Transactions Add** dialog box only the Base transaction is looked up.

NOTE: Scheduled transactions will not become effective until an invoice is run and you are prompted to apply the changes. For more information, see the *Invoicing* chapter.

Pickup / Deliver Combination - Quantity Breaks

Whether you deliver or pick up one item or ten items on a single workorder, there is a certain base amount of effort that you must expend. Delivering ten items does not take ten times the effort of delivering one.

Therefore, you may want to charge considerably more for the first item than for the tenth. To do this, you offer your customers quantity breaks.

Also, when you deliver an item to a customer's office, you tend to go through the same motions as when you pick something up. Therefore, it would make sense for you to offer your customers those quantity breaks on the combined number of pickups and deliveries. O'Neil Stratus' flexibility allows you to do just that.

Likewise, you can combine the Actions "Access" and "Receive" for quantity breaks, since the physical actions for those activities are so similar. As you continue through this section, please keep in mind that the same is true for these Actions as for Pickup and Deliver.

Let's consider the following pricing example created without combined quantity breaks:

You charge the following quantity break amounts for Deliveries and for Pickups

Delivery	Pickup
0 - 1	\$5.00
2 - 10	2.00
11 - 20	1.00
21 - 9999	.50
	\$5.00
	2.00
	1.00
	.50

Accumulate is set at Yes.

You deliver 20 containers to a customer and at the same time pickup 10.

If you do not have quantity breaks assigned for the combined Actions of Pickup and Deliver, the charges would appear as:

Deliver the first Container	1 x 5.00	\$5.00
Deliver the next 9 Containers	9 x 2.00	18.00
Deliver the next 10 containers	10 x 1.00	10.00
Pickup the first Container	1 x 5.00	5.00
Pickup the next 9 Containers	9 x 1.00	18.00
Total		56.00

If you were to combine Pickup and Delivery Actions and offer the same Quantity Breaks on the new Action, the charges would appear as:

Pickup/Deliver the first Container	1 x 5.0 = 5.00
Pickup/Deliver the next 9 Containers	9 x 2.0 = 18.00
Pickup/Deliver the next 10 Containers	10 x 1.0 = 10.00
Pickup/Deliver the next 10 Containers	10 x .50 = 5.00

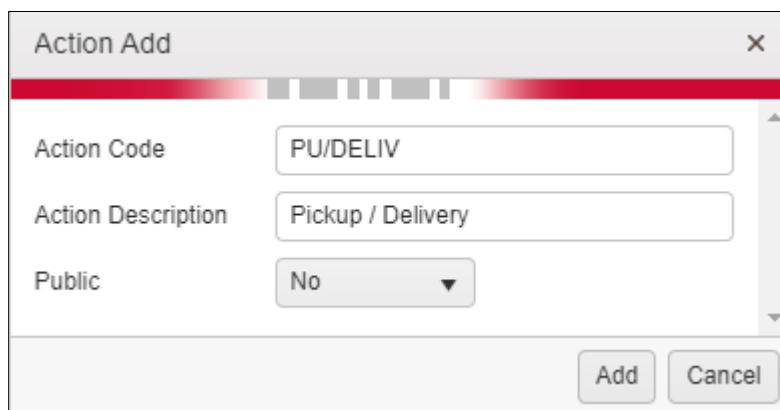
Total	\$38.00
--------------	----------------

O'Neil Stratus keeps the Pickup and Deliver actions separate until you set them to be combined. To combine your Pickup and Deliver Actions, the steps in the following sections need to be completed (the following is written assuming you want to combine the Pickup and Deliver actions for all accounts, and therefore is completed at the Base level). First we create a new Action in the Service sublist, called "Pickup / Delivery." Then we edit the existing Action associated with Deliveries to the new Pickup / Delivery Action. We do the same thing for Pickups, so that the Delivery and Pickup activities are associated with the same Pickup / Delivery Action. Last, we establish a new Transaction with Quantity Breaks.

Create a New Service Action - Pickup / Delivery

From the **Administration** menu, **Setup** submenu, select **Action**. Right click on Service and select **Sublist**. Right click anywhere in the **Service Action** grid and select **Add**.

Fill in the **Action Add** dialog box as shown.



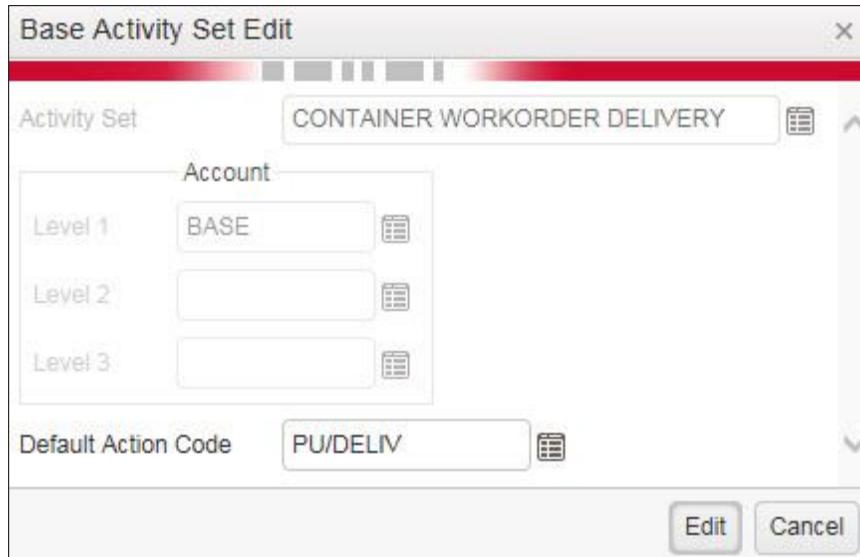
Click **Add** to add the new Action to the system, and **Cancel** to return to the **Service Action** grid.

Edit Existing Action Associated with Deliveries to New Pickup/Delivery Action

From the **Administration** menu, **Activity Set** submenu, select **Base Activity Set**. The **Base Activity Set** grid appears listing the Activity Sets available.

This action should take place whenever a Container is delivered through a Workorder, so right click on "CONTAINER Workorder DELIVERY" and select **Edit**. The **Base Activity Set** grid appears. Right click on the CONTAINER Workorder DELIVERY activity with the Delivery action code and select **Edit**.

In the **Base Activity Set Edit** dialog box, enter the new PU/DELIV Action Code as shown.



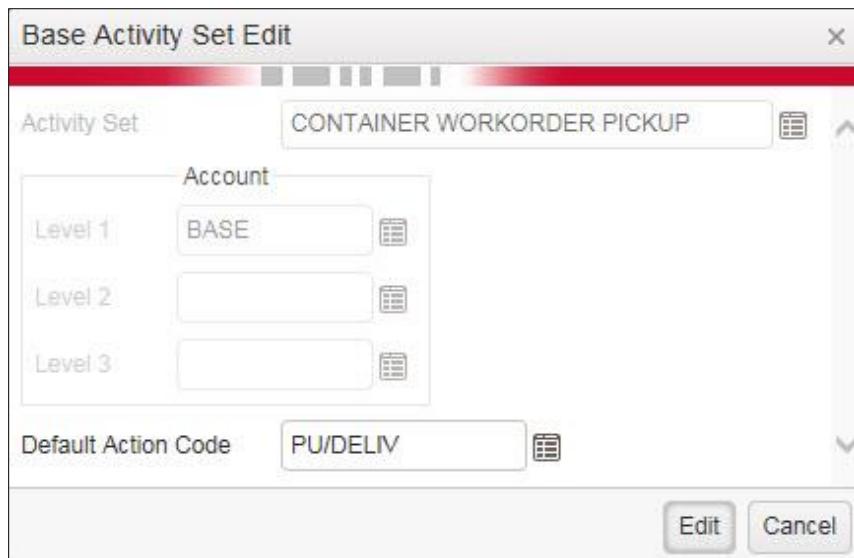
Click **Edit** to complete the edit of the Action Code and return to the **Base Activity Set** grid.

Edit Existing Action Associated with Pickups

From the **Administration** menu, **Activity Set** submenu, select **Base Activity Set**. The **Base Activity Set** grid appears fully loaded.

This action should take place whenever a Container is picked up through a Workorder, so right click on "CONTAINER Workorder PICKUP" and select **Edit**. The **Base Activity Set** grid appears. Right click on the CONTAINER Workorder PICKUP activity and select **Edit**.

In the **Base Activity Set Edit** dialog box, enter the new Pickup/Deliver Action Code as shown.



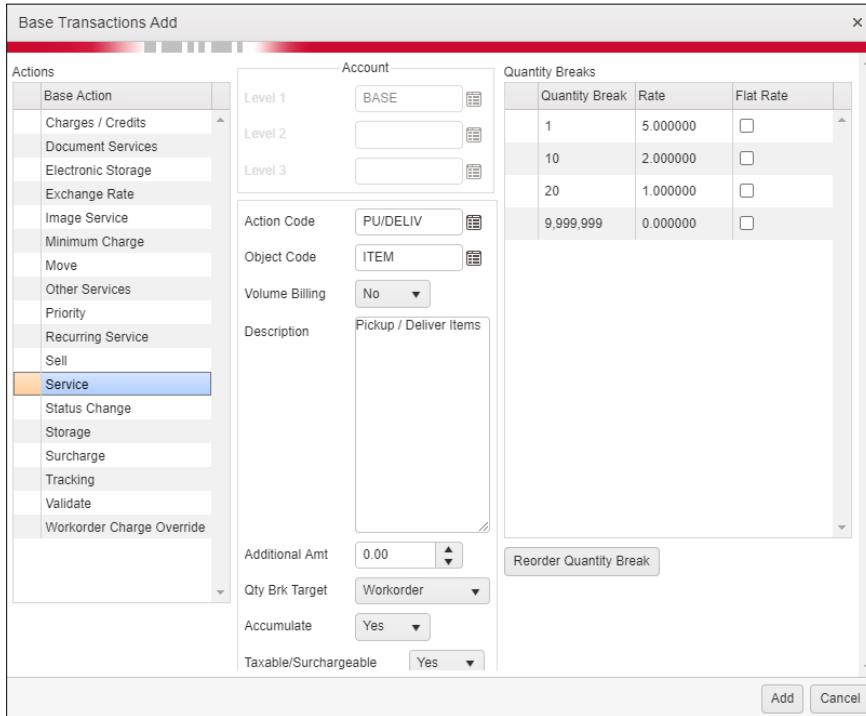
Click **Edit** to complete the edit of the Action Code and return to the **Base Activity Set** grid.

You have now completed editing the Activity for Container Pickups and Deliveries. Complete the same procedures for Filefolder Pickups and Deliveries.

Set up Quantity Breaks for New Action

From the **Administration** menu, **Transaction** submenu, select **Base Transaction**. The **Base Transactions** grid appears.

Right click anywhere in the grid and select **Add**. The **Base Transactions Add** dialog box appears. Complete the fields as shown.



To add additional Quantity Breaks, right click on a line and select **Insert Before** or **Insert After**. If the Quantity Breaks are not listed in sequential order, you are notified. Click **Reorder Quantity Break** to correct them.

The screenshot shows a software window for setting up a transaction. On the left, there are several input fields: 'Account' (Level 1: BASE, Level 2: [redacted], Level 3: Data Entry Errors, Qty is not in increasing sequence), 'Action Code' (PU/DELIV), 'Object Code' (ITEM), 'Volume Billing' (No), 'Description' (Pickup / Deliver Items), 'Additional Amt' (0.00), and 'Qty Brk Target' (Workorder). On the right, there is a table titled 'Quantity Breaks' with the following data:

	Quantity Break	Rate	Flat Rate
1	5.000000	<input type="checkbox"/>	
15	2.500000	<input type="checkbox"/>	
10	2.000000	<input checked="" type="checkbox"/>	
20	1.000000	<input type="checkbox"/>	
9,999,999	0.000000	<input type="checkbox"/>	

Below the table is a button labeled 'Reorder Quantity Break'.

When you have finished, click **Add** to add the new Transaction and Quantity Breaks to the system.

Notice that we used the Object, "ITEM." Using this object causes the system to use this transaction for all items that might be picked up or delivered, regardless of what they are. If you charge different prices for picking up and delivering Containers and Filefolders, you can create two or more Transactions with Quantity Breaks to reflect your operations.

New Storage - Quantity Breaks

When quantity breaks are applied for charges for New Storage, the system will attempt to calculate the quantity from the previous invoice by using the following formula:

<Current month's quantity (IN + OUT items)> - <Actual New Storage Quantity (# of adds during the invoicing period)> + <Permits that occurred during the invoicing period> + <Destroys that occurred during the invoicing period>

The quantity break used will be based on this calculated value. Also, additional amount will not be applied for New Storage.

Important Notes

- Currently, this will work only for transactions set up as "In or Out-Charge by Item" for the Charge Type.
- This should work for most transactions, but may not work correctly if the transaction is set up as Accumulate = No and all quantity breaks are set up as Flat Rate = Yes. For example if there are two quantity breaks, 1-100 with a flat rate of \$15, and 101-200 with a flat rate of \$30, and initially you had 50 boxes, the first invoice will print with a flat rate of \$15. If 100 boxes were added during the month, then the new storage on the next invoice will fall within the second quantity break, with a flat rate of

\$30. So, in this case, the new storage will be charged at the \$30 rate. This may or may not be what you want to occur.

- If the transaction was changed between the previous invoice and the current invoice, the New Storage charges may not be what is expected. It will be calculated as if the current transaction was the one used in the previous invoice.

Example 1

Assume the following quantity breaks:

1-10	1.00
11-1000	0.75

Assume that for the previous month they started with 5 boxes and added 50 during the month. Their bill forward charges will be the following:

5 items @ 1.00 for a total of \$5.00
For a total of \$5.00

Because the 50 items were added during the month, they aren't included in the above charges.

For the next month, the charges will be as follows:

10 bill forward items @ 1.00 for a total of \$10.00
45 bill forward items @ 0.75 for a total of \$33.75
5 new storage items @ 1.00 for a total of \$5.00
45 new storage items @ 0.75 for a total of \$33.75
For a total of \$82.50

Because the previous month's storage was 5, the new storage quantity for the purposes of determining the quantity break will start at 5 instead of zero.

Example 2

The following transactions have been set up:

UVB Container Transaction

Account Transactions Edit

Actions		Account		Quantity Breaks		
Base Action	1000	Level 1	<input type="text" value="1000"/>	<input type="button" value="..."/>	Quantity Break	Rate
Charges / Credits		Level 2	<input type="text"/>	<input type="button" value="..."/>	100	15.000000
Document Services		Level 3	<input type="text"/>	<input type="button" value="..."/>	200	1.000000
Electronic Storage					9999999	0.500000
Exchange Rate						
Image Service						
Minimum Charge						
Move						
Other Services						
Priority						
Recurring Service						
Sell						
Service						
Status Change						
Storage		Description	UVB Container	<input type="button" value="..."/>		
Surcharge		Discount Base	0.00000	<input type="button" value="..."/>		
Tracking		Additional Amt	0.00	<input type="button" value="..."/>		
Validate		Accumulate	Yes	<input type="button" value="..."/>		
Workorder Charge Override		Charge Type	In or Out-Charg...	<input type="button" value="..."/>		
		Rate Days	30	<input type="button" value="..."/>		
		Taxable/Surchargeable	No	<input type="button" value="..."/>		
					<input type="button" value="Reorder Quantity Break"/>	

UVB Filefolder Transaction

The following invoice was generated:

	RATE	QTY	TOTAL
STORAGE: 5/1/2016 through 5/31/2016			
Store (BASE only)	(0.7500/day)	0.7500	594.00
New Storage: UVB Container	(0.5000/30 days)	0.5000	0.14
UVB Container	(15.0000/30/days)	15.5000	100.00
UVB Container	(1.0000/30 days)	1.0333	100.00
UVB Container	(0.5000/30 days)	1.5167	41,424.82
UVB Filefolder	(15.0000/30/days)	15.5000	0.65
Letter Transfer Cases	(110.0000/30 days)	113.6667	1.00

			22,219.46
			Storage tax @ 7.12345%
			49.70

			22,269.16

1 filefolder and 4 containers were permed out during the invoicing period.

New Storage: UVB Container - the third quantity break was applied, and the additional amount was not applied.

New Storage: UVB Folder - no extra amount was charged because the quantity still falls within the quantity of the first quantity break. Because the flat rate was already charged for the previous month, the customer is not charged again.

Minimum Invoice Before Tax

Under MINCHARGE, the MININVOICE (Minimum Invoice Charge) action applies the minimum charge as the last step in the invoice. This means that the Invoice Tax is applied first, and then the Invoice Minimum Charge. There is also a MININVBT (Invoice Minimum Charge Before Tax) action which provides another option. It applies the Invoice Minimum Charge first, and then applies the tax. See examples below.

Example #1 Using MININVOICE

INVOICE			
Insurance Company Susan Jacobson 543 Insurance Parkway 5th Floor Smithtown, NY 11324	Invoice No. 0000072 Date: 1/30/2002 Acct: 2000 Account PO#: 73924 From: 12/1/2001 to 12/31/2001	Page: 1	
STORAGE: 12/1/2001 through 12/31/2001		RATE	QTY
storage container	(0.3000/30 days)	0.3000	48.00
		-----	-----
		48.00	14.40
		=====	=====
		14.40	
		Invoice Tax @ 7.75%	1.12
(Invoice Minimum Charge: 20.00)		Total Amount Due	20.00

In Example #1, Invoice Tax is calculated on the total and then the minimum invoice charge is applied. The amount that was added to reach the minimum charge does not show on the invoice.

Example #2 Using New MININVBT

INVOICE					
Insurance Company Susan Jacobson 543 Insurance Parkway 5th Floor Smithtown, NY 11324	Invoice No. 0000071 Date: 1/30/2002 Acct: 2000 Account PO#: 73924 From: 12/1/2001 to 12/31/2001	Page: 1			
STORAGE: 12/1/2001 through 12/31/2001		RATE	QTY	TOTAL	
storage container	(0.3000/30 days)	0.3000	48.00	14.40	
			48.00	14.40	
				14.40	
				(Invoice Minimum Charge: 20.00) 5.60	
				=====	
				20.00	
				Invoice Tax @ 7.75% 1.55	
				Total Amount Due 21.55	

As you can see in Example #2, the additional amount necessary to meet the invoice minimum charge now displays. The Invoice Tax is then calculated on the minimum charge of \$20.00.

Setting up MININVBT

To use Minimum Invoice Before Tax, remove the MININVOICE transaction and add a new transaction using MININVBT. From the **Administration** menu, **Transaction** submenu, select **Account Transaction** (works the same for Base Transactions). The **Account Transactions** grid appears. Right click anywhere in the grid and select **Add**.

Quantity Breaks			
Quantity Break	Rate	Flat Rate	

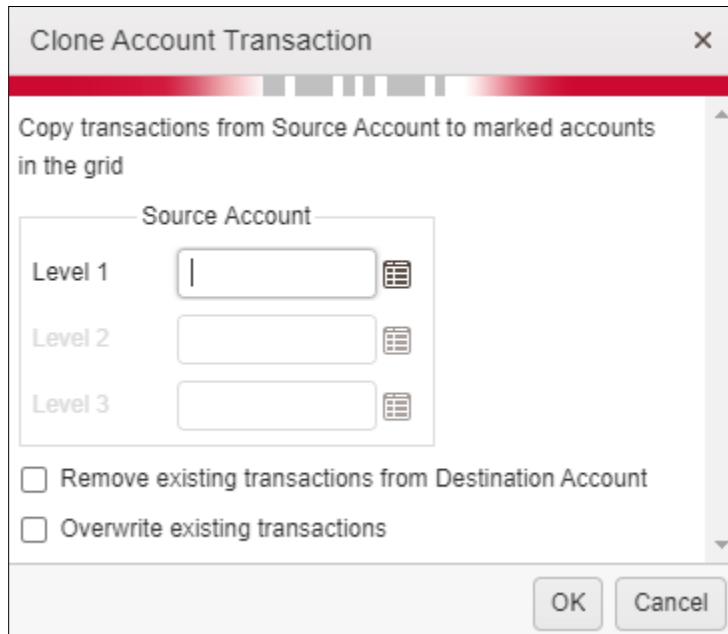
Select **Minimum Charge** in the Actions section. Select an Account. Click the grid picker next to the Action Code field, and select **MININVBT**. In the Rate field type your minimum charge. Click **Add** to add the transaction.

NOTE: While it is possible to use both MININVBT and MININVOICE transactions at the same time, doing so will cause irregularities in your invoices. Therefore, it is recommended that you use only one at a time.

Clone Account Transactions

When you set up your pricing structure, you may find that you offer the same transaction combinations, quantity breaks and prices to several accounts. When this happens, you can copy (clone) the Account Transactions from one Account to other Accounts. This is particularly useful for copying Account Transactions to Level 2 and 3 accounts. This is done through the **Account** grid.

Load all the accounts that you want to copy Account Transactions to onto the **Account** grid. Make sure they are marked. From the **Options** menu, select **Clone Account Transactions**.



Enter the account whose transactions you want to copy to the accounts on the grid. You can also choose the Base account to copy from.

Remove existing transactions from Destination Account

Selecting this option causes any existing transactions to be deleted from any accounts on the grid. Even if a transaction exists for the marked account that does not exist in the source account, it is deleted.

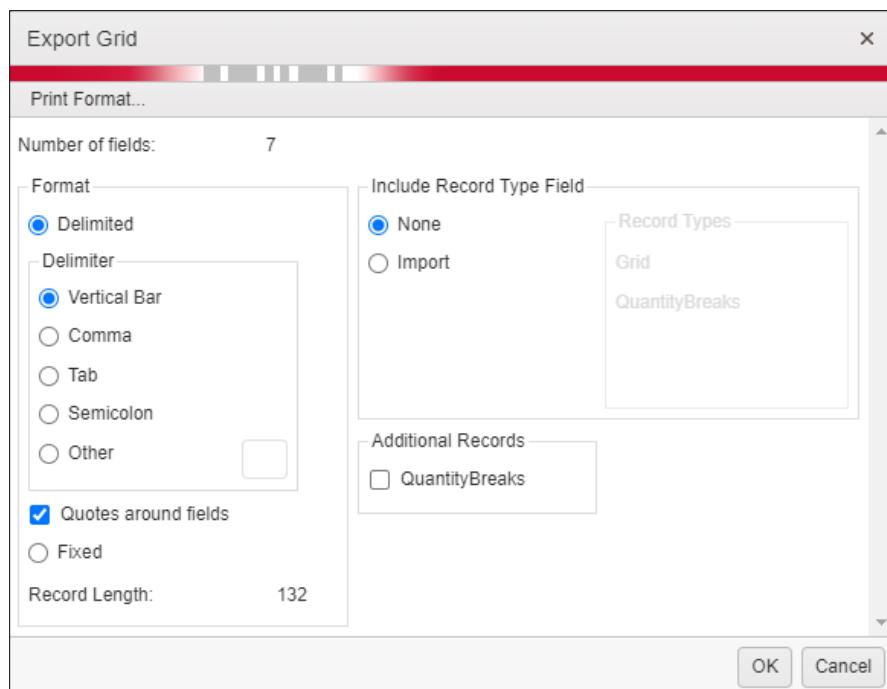
Overwrite existing transactions

When this option is selected, the system overwrites any existing transactions, but leaves transactions where the Source Account does not have one. For example, you load ABC Account onto the grid, and it has a transaction associated with it for Selling 1.2 Containers. You want to clone the transactions from XYZ Account, but XYZ does not have a transaction for selling 1.2 containers. That transaction remains with ABC.

If neither of the above options is selected, the system does not overwrite any existing transactions, nor does it delete any. Any existing transactions remain, and any that were blank are filled in if they exist in the Source account.

Export Transaction Files

When you use the O'Neil format to export transaction information, you have the choice of including quantity breaks. In the **Export Grid** dialog box (Base or Account), under Additional Records, is a *Quantity Breaks* check box. Select the check box to include quantity break information in the export file.



Importing

Importing

O'Neil Stratus allows you to import data by way of formatted text files. This allows you to import data from a customer's internal record keeping system, and conduct simple or partial conversions.

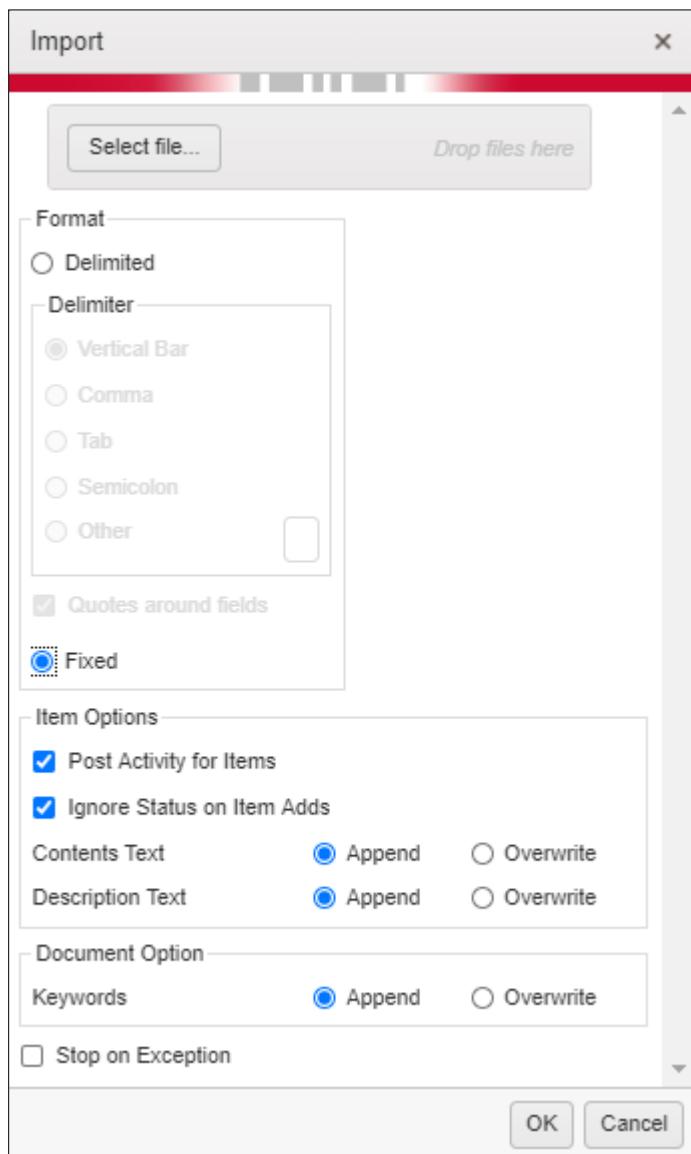
Importing can be conducted in most tables, and is found under the Options menu. When you import data through this menu item, only records pertaining to the table can be imported. Importing can also take place across several tables, through the Administration menu, Maintenance submenu. When conducted at this level, all record types can be imported.

It is important to keep in mind that records must be imported in the proper order for the system. For example, you cannot add a container for an account that does not yet exist. Therefore, to avoid import errors, be sure that the data in the Required column of the table below exists before importing the data in the Data Type column. Data in the Optional column needs to be imported first only if it is included in the data type column import records.

Data Type	Required	Options
Account		Invoice Cycle
Container Item	Barcode, Account, Location	Security Code, Category Code
Filefolder Item	Barcode, Account, Location, Container (if it is to be contained-in)	Security Code, Category Code
Tape Item	Barcode, Account, Location, Container (if it is to be contained-in)	Security Code, Category Code
Location	Barcode, Object	Account
User	Barcode, Security Code	

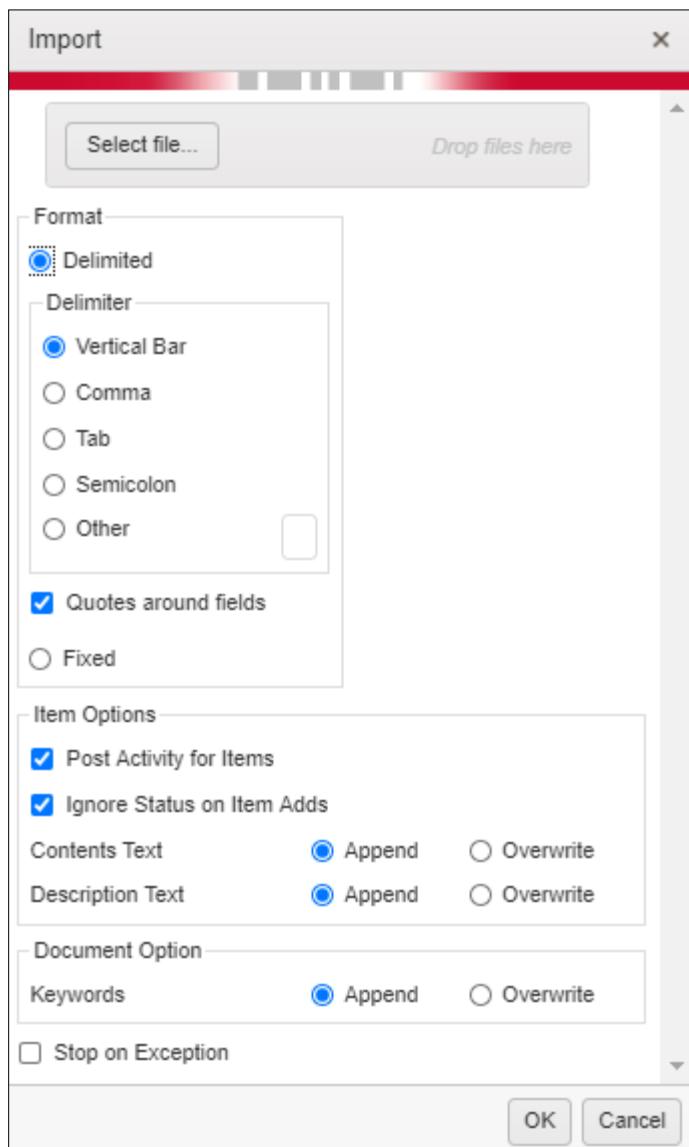
You may import your file in one of two formats: Fixed or Delimited.

Import Type - Fixed



A Fixed format file establishes a fixed number of spaces for each field. When there is no data in a field, or if the field is not full, it is filled with spaces. However, if the last fields are empty, it is not necessary to pad them all. You can simply start the next line of data, and save space.

Import Type – Delimited



A Delimited format file uses a delimiter; a character never used within the data, to mark fields. This generally reduces the import file size considerably.

In the delimited format, a delimiter must exist for each field. A delimiter merely followed by another delimiter means that the field is to be ignored, and any existing data remains. When you choose Delimited as your file format, you need to let the system know what the delimiter is. The default is the vertical bar (|), since this character should never be necessary as part of the data. A value of T can be used to represent the Tab character. When using the Tab delimiter, you should avoid using tabs in text entered in the Contents and Description fields. The system will identify the tab as a delimiter.

NOTE: When using this format - with or without quotation marks - if the last fields are empty, it is not necessary to delineate them with delimiters. You can simply start the next line of data, and save space.

Delimited with Quotes Around Fields

When the *Quotes around fields* check box is selected, data fields are enclosed in quotation marks, then delimited with a delimiter. As in the case of the delimited format, a delimiter merely followed by another

delimiter means that the field is to be ignored - any existing data remains. However, if the delimiter is followed by a pair of quotes (|"|") the field is to be set to no value, or empty. This is only permitted in fields in which data is not required. If you do not want the field cleared, do not include the quotation marks. Instead, follow the delimiter with another delimiter.

Within a delimited file, quotation marks can be used to define fields that might have the delimiter in them as a character. For example, if fields are delimited by a comma, the Description or Contents fields of the Container Items may contain a comma. If this field is separated with quotation marks, the system recognizes the commas within it as data characters and not delimiters.

Delimited with User Defined Columns

This option allows you to define the columns you want to import, as well as the order. The check box is not selected by default.

This format only applies to item importing; therefore, it is only available in the **Container**, **Filefolder**, and **Tape** grids.

Each input file must contain a Format Definition Line (FDL) for the contained record type. The FDL is the first record in the file. The line should include the Import Record Type, which must be first, followed by the columns you want to import. The order in which the columns appear does not have to conform to any legacy rules for order. However, all legacy field rules for *Required for Add and/or Edit* still apply.

The columns in the FDL must use the column description as contained in the grid Search-Load functionality for that grid. Therefore, column specifications in the FDL must be in English. Note: For Account, use the Three Level Account field with the default string of AccountCode. There are a few exceptions, which are not available in Search-Load:

Container Grid:	Contents LongDescription
Filefolder Grid:	Contents LongDescription ContainedInDate
Tape Grid:	Contents LongDescription ContainedInDate

If you want to include the ContainedInDate column in the FDL, it must be typed exactly as it is shown here.

FDLs may contain Contents and Long Description text, under the special column headings Contents and LongDescription. These special columns impose limitations on the text formatting since the text cannot be formatted into user-defined lines. Therefore, the text will break at a <SPACE> character and database records will be inserted one record at a time staying within the 80 character limit for Contents and 255 character limit for Description text.

Example

The following is an example of a partial FDL:

CI|AccountCode|Code|AddDate| ... |LastFieldName

The following is a data line to match the above partial FDL:

CI|1000\0001|1234567|01/23/09| ... |Last field text

NOTE: The word "skip" can be used in the FDL to indicate that a column in the import stream is to be ignored.

The following is an example where Quotes Around Fields is also selected:

```
FI||"Code"|"AccountCode"|"ContainerCode"|"ContainedInDate"|"ItemStatus"|"PermFlag"|"SecurityCode"|"Destr
oyDate"|"ChargeForStorage"|"StatusDate"
FI||"34567890"|"1000"|"123456"|"7/19/2011"|"In"|"No"|"99"|"01/23/2020"|"Yes"|"07/19/2011"
```

NOTE: The record type should not have quotes.

Post Activity for Items

In most circumstances, when an item is added, refiled, moved, etc., by way of an import file, you will want that activity reflected in the Activity History of that item. However, under special circumstances you may want to avoid capturing the import activity. If for some reason this becomes necessary or desirable, clear this check box.

If this option is selected, the Activity Date/Time and the Scan Date/Time is set to the date and time of the import.

If an item's status is changed due to an import, the Status Date is set to the date that is specified in the import information. If none is specified, it is set to the current date and time. As mentioned above, the Activity Date/Time and Status Date/Time are set to the current date and time as well.

If an item is added through an import, the Add Date is set to the value of the import Add Date field; if none is provided, it is set to the current date/time (recommended).

Ignore Status on Item Adds

When this option is selected, the value in the status field is ignored when importing new items. If the Post activity for items option is also selected, an activity record is generated for the Add action. If the Ignore Status option is deselected, the Container or Filefolder is imported with the status given in the import file. Blanks or no value in the Status field is processed as a status of "In." If the Post Activity option is also selected, two activity records are generated: Add and Status Change.

Append/Overwrite Contents/Description Text

The append option causes Contents and Description text to be added to the end of any existing text. Choosing the Overwrite option causes existing text to be replaced with the new text.

Overwrite Rules

Use the Overwrite option with caution. When you choose to overwrite existing text, you must ensure that the import file is clean. This means that a container should not have Contents Text listed twice in the file.

For example, if you have an import file that has a container with 10 lines of Contents text, and you choose overwrite, the system deletes any existing text in the Contents file for that container, then enters the first line of new Contents text. If the second line is directly after the first line, then the second line is added after the first line of text, and so on for all lines that are next to each other in the file. However, if another Container is then listed in the file, then the first Container is listed again with an 11th line of Contents text, the first 10 lines of Contents text is deleted and replaced with this last line.

Document Keywords

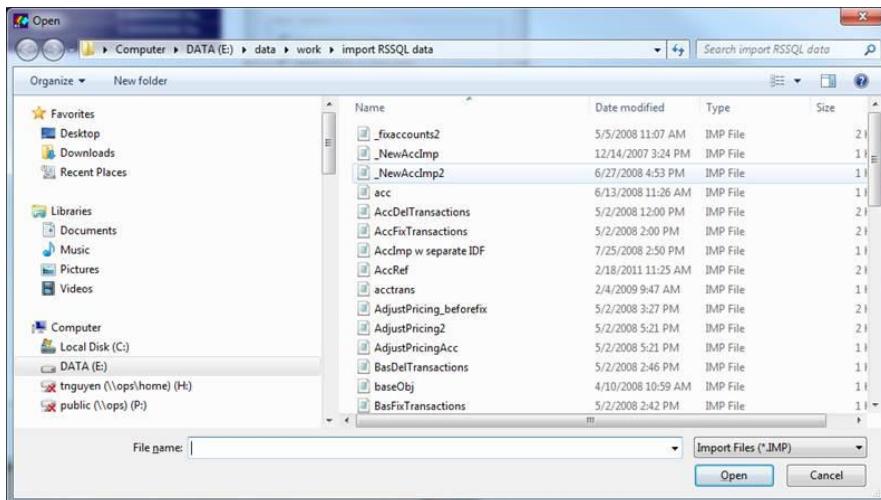
You can choose to append or overwrite all document keywords. This works the same way as Contents Text and Description Text.

Stop on Exception

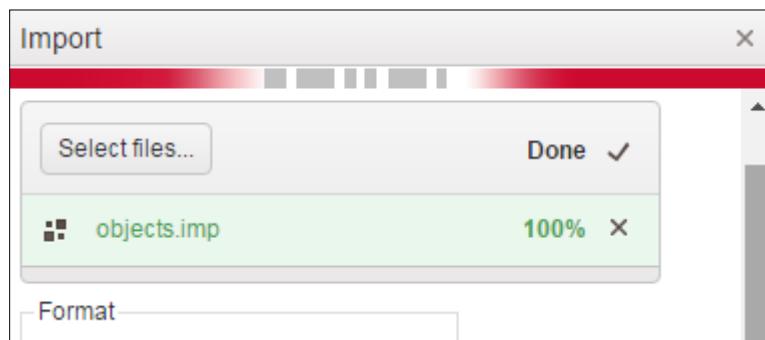
Select this check box if you want the import to stop when it encounters an exception. By default the check box is not selected, and the import will continue even with exceptions.

Import File

To select your import file, click **Select files**.



Select your directory and file name. Once the file appears in the File name field, click **Open**. The dialog closes and the file name is added to the **Import** dialog.



Click **OK** to import the file.

NOTE: All settings in the **Import** dialog are saved and used as the default settings the next time an import is run. A different set of selections is saved for each user, but the same selections apply in every grid in which that user runs an import.

Import Files

When importing information into individual grids, only records pertaining to the current grid can be imported. The records that pertain to each grid are listed below. So, for example, the Container grid below allows for the importing of several record types; but note that there are certain implied dependencies. A Container Item record must precede a Container Contents record in the import file for a particular Container, or that Container must already exist in the database if you import Container Contents without a preceding Container Item record.

Program	Grid	Record Type Allowed
Operations	Container Items	Container Item, Container Contents, Container Description, Container Schedule
	Filefolder Items	Filefolder Item, Filefolder Contents, Filefolder Description, Filefolder Schedule
	Tape Items	Tape Item, Tape Contents, Tape Description
	Scheduling	Container Schedule, Filefolder Schedule, Tape Schedule
	Account	Account, Account Customer Service Instructions
	Account Range	Account Range
	Account Retention Information	Account Retention Information, Account Retention Information Legal Citation
	Action	
	Base	Base Action
	Service	Service Action
Administration	Priority Service	Priority Service Action
	Minimum Charge	Minimum Charge Action
	Other Service	Other Service Action
	Recurring Service	Recurring Service Action
	Surcharge	Surcharge Action
	Validate	Validate Action
	Authorized List	Authorized List
	Barcode Lengths	Barcode
	Base Retention	Base Retention Information, Base Retention Information Legal Citation
	CoA Cross Reference	Chart of Accounts Cross Reference
	Content Category	Content Category
	Delivery Address	Delivery Address
	Invoice Cycle	Invoice Cycle
	Legal Citation	Legal Citation
	Legal Citation Type	Legal Citation Type
	Location	Location, description, building, floor, room, capacity
	Object	
	Base	Base Object
	Container	Container Object
	Material	Material Object
	Tape	Tape Object
Object	Record Series	Record Series
	Review Reason	Review Reason
	Security Level	Security Level
	Base Transactions	Base Transaction, Base Transaction Quantity Break
	Account Transactions	Account Transaction, Account Transaction Quantity Break
	Users	User
	User Account Access	User Account Access

In addition to importing directly into grids, a global Import function is available under the **Administration** menu, **Maintenance** submenu. All record types can be imported at this level.

Import Format

In the Fixed Format, fields are required to be padded with space up to the length of the field. In the Delimited Format a field should not exceed the length defined for it below. Note that in the list below some fields are required, i.e., these fields must not be blank. The 2-character Record Type is required at the beginning of each record. The spaces for each field of each table are listed below:

Account (Add/Edit)

Field Name	Format	Required For	Columns
Record Type	2 (AC)	Add/Edit	1-2
Level 1 Account Code	8 alphanumeric	Add/Edit	3-10
Level 2 Account Code	8 alphanumeric		11-18
Level 3 Account Code	8 alphanumeric		19-26
Open?	3 (Yes/No)	Add	27-29
Separate Invoice?	3 (Yes/No)	Add (should be YES for Level 1 Account)	30-32
Account Description	35 alphanumeric		33-67
Contract Expire Date	10 (Windows Region/Language)		68-77
PO Number	12 alphanumeric		78-89
Salesman Code	5 alphanumeric		90-94
Mail Attention	35 alphanumeric		95-129
Mail Addr Line 1	35 alphanumeric		130-164
Mail Addr Line 2	35 alphanumeric		165-199
Mail Addr Line 3	35 alphanumeric		200-234
Mail Addr Phone	20 alphanumeric		235-254
Mail Addr Fax	20 alphanumeric		255-274
Mail Addr Route	12 alphanumeric		275-286
Pickup Contact	35 alphanumeric		287-321
Pickup Addr Line 1	35 alphanumeric		322-356
Pickup Addr Line 2	35 alphanumeric		357-391
Pickup Addr Line 3	35 alphanumeric		392-426
Pickup Addr Phone	20 alphanumeric		427-446
Pickup Addr Fax	20 alphanumeric		447-466
Pickup Addr Route	12 alphanumeric		467-478
Invoice Definition	8 alphanumeric		479-486
Invoice Cycle Code	5 alphanumeric		487-491
Invoice Discount	8 numeric		492-499
Prorate Month?	3 (Yes/No)		500-502
Adjust Charges?	3 (Yes/No)		503-505

Highwater Storage?	3 (Yes/No)	506-508
Volume Billing	3 (Yes/No)	509-511
Bill Forward?	3 (Yes/No)	512-514
Bill Forward Month	5 numeric (1-12)	515-519
Bill Forward Year	5 numeric (0-9999)	520-524
Bill Fwd Length In Months	5 numeric (1-12)	525-529
Apply Priority to Workorder?	3 (Yes/No)	530-532
Accounting Cust Code	15 alphanumeric	533-547
Use Parent Retention	3 (Yes/No)	548-550
Apply Priority to each item on the workorder?	3 (Yes/No)	551-553
Apply Priority to each action of activity sets?	3 (Yes/No)	554-556
Default Priority Action Code	11 alphanumeric	557-567
Priority Required	3 (Yes/No)	568-570
Storage IDF	8 alphanumeric	571-578
Services IDF	8 alphanumeric	579-586
Group	25 alphanumeric	587-611
Workorder Charges	40 alphanumeric	612-651
Workorder Pickup Receive Charges	40 alphanumeric	652-691
Enable O'Neil Bridge?	3 (Yes/No)	692-694
Reference	20 alphanumeric	695-714
Mail Stop Group	15 alphanumeric	715-729
Pickup Stop Group	15 alphanumeric	730-744

Account Instructions (Add/Overwrite)

Field Name	Format	Required For	Columns
Record Type	2 (AI)	Add/Edit	1-2
Account	26 Alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)	Add/Edit	3-28
Instructions	245 alphanumeric	Add/Edit	29-273

Account Range (Add only)

Field Name	Format	Required For	Columns
Record Type	2 (AR)	Add	1-2
Account	26 alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)	Add	3-28
Object Code	10 alphanumeric	Add	29-38
Begin Code	15 alphanumeric	Add	39-53

End Code	15 alphanumeric	Add	54-68
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Account Retention Information (Add/Edit)

Field Name	Format	Required For	Columns
Record Type	2 (RI)	Add/Edit	1-2
Record Series Code	20 alphanumeric	Add/Edit	3-22
Account	26 alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)	Add/Edit (must not be "BASE")	23-48
Description	255 alphanumeric		49-303
Office Retention Requirement	5 numeric		304-308
Office Retention Unit	5 alphanumeric		309-313
Offsite Retention Requirement	5 numeric		314-318
Offsite Retention Unit	5 alphanumeric		319-323
Object Code	10 alphanumeric	Add/Edit	324-333
Disposition Code	35 alphanumeric		334-368
Vital Record?	3 (Yes/No)		369-371
Public Inspection?	3 (Yes/No)		372-374
Legal Hold?	3 (Yes/No)		375-377
Additional Comment	512 alphanumeric		378-889
Modify Approval Date	10 (Windows Region/Language)		890-899
Resolution Approval Doc	60 alphanumeric		900-959
Basis Date Order	8 alphanumeric		960-967
Active	3 (Yes/No)		968-970

Account Retention Information Legal Citation (Add/Edit)

Field Name	Format	Required For	Columns
Record Type	2 (AX)	Add/Edit	1-2
Legal Citation Code	20 alphanumeric	Add/Edit	3-32
Record Series Code	20 alphanumeric	Add/Edit	33-52
Object Code	10 alphanumeric	Add/Edit	53-72
Account	26 alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)	Add/Edit (must not be "BASE")	63-88

Account Transaction (Add/Edit)

Field Name	Format	Required For	Columns
Record Type	2 (AT always REQUIRED)	Add/Edit	1-2
Account	26 alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)	Add/Edit	3-28

	Level2AccountCode\Level3AccountCode)		
Action Code	11 alphanumeric	Add/Edit	29-39
Object Code	10 alphanumeric	Add/Edit	40-49
Accumulate?	3 (Yes/No)	Add	50-52
Additional Amount	14 numeric		53-66
Discount Base Rate	14 numeric		67-80
Qty Break Target	15 (Workorder/Invoice)		81-95
Account Transactions Description	55 alphanumeric		96-150
Surchargeable	3 (Yes/No; set to Yes if no value given)		151-153
Volume Billing	3 (Yes/No)		154-156

Account Transaction Quantity Break (Overwrite)

Field Name	Format	Required For	Columns
Record Type	2 (AQ)	Overwrite	1-2
Account	26 alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)	Overwrite	3-28
Action Code	11 alphanumeric	Overwrite	29-39
Object Code	10 alphanumeric	Overwrite	40-49
Qty Break	14 numeric	Overwrite	50-63
Flat Rate?	3 (Yes/No)	Overwrite	64-66
Charge Rate	14 numeric *		67-80
Volume Billing	3 (Yes/No)		81-83

* Charge Rate number must be less than 10,000,000, and will be rounded to 6 decimal places.

Actions

Field Name	Format	Required For	Columns
Record Type	2 (please see table below)	Add/Edit	1-2
Action Code	11 alphanumeric	Add/Edit	3-13
Action Description	25 alphanumeric		14-38

Action Code	Record Type	Import Action
Base Action	BA	Edit only
Minimum Charge Action	MA	Add/Edit
Other Services Action	OA	Add/Edit
Priority Action	PA	Add/Edit
Recurring Service Action	RA	Add/Edit
Service Action	SA	Add/Edit
Surcharge Action	CA	Add/Edit
Validate Action	VA	Edit only

Authorized List (Add only)

Field Name	Format	Required For	Columns
Record Type	2 (AL)	Add	1-2
Account	26 alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)	Add	3-28
Last Name	30 alphanumeric	Add	29-58
First Name	30 alphanumeric		59-88
Password	20 alphanumeric		89-108
Inactive	3 (Yes/No)		109-111
Notes	7500 alphanumeric		112-5111
Phone	21 alphanumeric		5112-5132
Email Address	128 alphanumeric		5133-5260

Barcode (Add only)

Field Name	Format	Required For	Columns
Record Type	2 (BL)	Add	1-2
Barcode Length	6 numeric (1-15)	Add	3-8
Assignment Object Code	10 (Container/ Filefolder/ Location/ Tape/User)	Add	9-18
Barcode Description	25 alphanumeric		19-43

Base Retention Information (Add/Edit)

Field Name	Format	Required For	Columns
Record Type	2 (BR)	Add/Edit	1-2
Record Series Code	20 alphanumeric	Add/Edit	3-22
Description	255 alphanumeric		23-277
Office Retention Requirement	5 numeric		278-282
Office Retention Unit	5 alphanumeric		283-287
Offsite Retention Requirement	5 numeric		288-292
Offsite Retention Unit	5 alphanumeric		293-297
Object Code	10 alphanumeric	Add/Edit	298-307
Disposition Code	35 alphanumeric		308-342
Vital Record?	3 (Yes/No)		343-345
Public Inspection?	3 (Yes/No)		346-348
Legal Hold?	3 (Yes/No)		349-351
Additional Comment	512 alphanumeric		352-863
Modify Approval Date	10 (Windows Region/Language)		864-873
Resolution Approval Doc	60 alphanumeric		874-933
Basis Date Order	8 alphanumeric		934-941
Active	3 (Yes/No)		942-944

Base Retention Information Legal Citation (Add/Edit)

Field Name	Format	Required For	Columns
Record Type	2 (BX)	Add/Edit	1-2
Legal Citation Code	20 alphanumeric	Add/Edit	3-32
Record Series Code	20 alphanumeric	Add/Edit	33-52
Object Code	10 alphanumeric	Add/Edit	53-72

Base Transaction (Add/Edit)

Field Name	Format	Required For	Columns
Record Type	2 (BT)	Add/Edit	1-2
Action Code	11 alphanumeric	Add/Edit	3-13
Object Code	10 alphanumeric	Add/Edit	14-23
Accumulate?	3 (Yes/No)	Add	24-26
Additional Amount	14 numeric		27-40
Quantity Break Target	15 (Workorder/Invoice)		41-55
Base Transactions Description	55 alphanumeric		56-110
Surchargeable	3 (Yes/No; set to Yes if no value given)		111-113
Volume Billing	3 (Yes/No)		114-116

Base Transaction Quantity Break (Overwrite)

Field Name	Format	Required For	Columns
Record Type	2 (BQ)	Overwrite	1-2
Action Code	11 alphanumeric	Overwrite	3-13
Object Code	10 alphanumeric	Overwrite	14-23
Quantity Break	14 numeric	Overwrite	24-37
Flat Rate?	3 (Yes/No)	Overwrite	38-40
Charge Rate	14 numeric *		41-54
Volume Billing	3 (Yes/No)		55-57

* Charge Rate number must be less than 10,000,000, and will be rounded to 6 decimal places.

Chart of Accounts Cross Reference (Add/Edit)

Field Name	Format	Required For	Columns
Record Type	2 (XR)	Add/Edit	1-2
Action Code	11 alphanumeric	Add/Edit	3-13
Object Code	10 alphanumeric	Add/Edit	14-23
Chart of Accounts Account Code	15 alphanumeric	Add/Edit	24-38

Container Contents Text (Append/Overwrite)

Field Name	Format	Required For	Columns
Record Type	2 (CN)	Append/Overwrite	1-2
Container Code	15 alphanumeric	Append/Overwrite	3-17

Contents Text	80 alphanumeric		18-97
Account Code	26 alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)	Required if container code is not specified	98-123
Alternate Code	15 alphanumeric	Required if container code is not specified	124-138

Container Description Keywords (Append/Overwrite)

Field Name	Format	Required For	Columns
Record Type	2 (CK)	Append/Overwrite	1-2
Container Code	15 alphanumeric	Append/Overwrite	3-17
Keyword	40 alphanumeric		18-57
Account Code	26 alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)	Required if container code is not specified	58-83
Alternate Code	15 alphanumeric	Required if container code is not specified	84-98

Container Description Text (Append/Overwrite)

Field Name	Format	Required For	Columns
Record Type	2 (CD)	Append/Overwrite	1-2
Container Code	15 alphanumeric	Append/Overwrite	3-17
Description Text	255 alphanumeric		18-272
Account Code	26 alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)	Required if container code is not specified	273-298
Alternate Code	15 alphanumeric	Required if container code is not specified	299-313

Container Item (Add/Edit)

NOTE: When a new item (Add) is imported, the Item Code is a required field and must be unique. If that Item Code already exists in the database, the existing item will be updated. However, importing also identifies items based on the Item Alias. If the imported Item Code exists as an Alias Item Code, importing will match the codes and update the item that had the Alias. No exception message is generated in this case.

Field Name	Format	Required For	Columns	User Defined
Record Type	2 (CI)	Add/Edit	1-2	CI
Code	15 alphanumeric	Required for Add; Required for Edit unless using Account Code and Alternate Code	3-17	Code
Account	26 alphanumeric (L1AccountCode\ L2AccountCode\ L3AccountCode)	Add/Edit (see above)	18-43	AccountCode
Location Code	15 alphanumeric		44-58	LocationCode
Item Status	15 (In /Out /Destroyed /Perm Out /Pending; In is		59-73	ItemStatus

	used for add if no value given)			
Perm Flag	3 (Yes/No)	Add	74-76	PermFlag
Alternate Code	15 alphanumeric	Edit (see above)	77-91	AlternateCode
Security Code	2 alphanumeric		92-93	SecurityCode
Category Code	8 alphanumeric		94-101	CategoryCode
Sequence Begin	15 alphanumeric		102-116	SequenceBegin
Sequence End	15 alphanumeric		117-131	SequenceEnd
From Date	10 (Windows Region/Language)		132-141	FromDate
To Date	10 (Windows Region/Language)		142-151	ToDate
Destroy Date	10 (Windows Region/Language)		152-161	DestroyDate
User Defined #1	25 alphanumeric		162-186	UserDefinedField1
User Defined #2	25 alphanumeric		187-211	UserDefinedField2
User Defined #3	25 alphanumeric		212-236	UserDefinedField3
User Defined #4	25 alphanumeric		237-261	UserDefinedField4
User Defined Date	10 (Windows Region/Language)		262-271	UserDefinedDate
Charge for Storage	3 (Yes/No)		272-274	ChargeForStorage
Set Name	15 alphanumeric		275-289	SetName
Object Code	10 alphanumeric		290-299	ObjectCode
Containee Object Code	10 alphanumeric		300-309	ContaineeObjectCode
Add Date	10 (Windows Region/Language)		310-319	AddDate
Status Date	10 (Windows Region/Language)		320-329	StatusDate
Record Series Code	20 alphanumeric		330-349	RecordSeriesCode
Description	40 alphanumeric (*special field*)		350-389	Description Contents
	(*special field*)			LongDescription

Container Schedule (Add only)

Field Name	Format	Required For	Column s
Record Type	2 (CR)	Add	1-2
Item Code	15 alphanumeric	Add	3-17
Review Date	10 (Windows Region/Language)	Add	18-27
Description	25 alphanumeric		28-52
Review Time	5 hh:mm		53-57

Charge Account	26 alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)	58-83
Workorder Account	26 alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)	84-109
Type Action Code	11 alphanumeric (blank/ Access/ Delivery/ Destroy/ Pickup/ Receive)	110-120
Object Code	10 alphanumeric (Container)	121-130
Quantity	14 numeric	131-144
Posted Date	10 (Windows Region/Language)	145-154
Posted Time	5 hh:mm	155-159
Apply Charge?	3 (Yes/No)	160-162
Perm Out?	3 (Yes/No)	163-165
Workorder	8 alphanumeric	167-173
Comment	81 alphanumeric	175-254
Requestor	25 alphanumeric	255-279
Cost Center	16 alphanumeric	280-295
Other Service Action	10 (leave blank)	Ignored 296-305
Material Object	10 (leave blank)	Ignored 306-315
Item Account	26 alphanumeric	Required if item code is not specified 316-341
Alternate Code	15 alphanumeric	Required if item code is not specified 342-356

Content Category (Add/Edit)

Field Name	Format	Required For	Columns
Record Type	2 (CC)	Add/Edit	1-2
Category Code	8 alphanumeric	Add/Edit	3-10
Category Description	25 alphanumeric		11-35

Delivery Address (Add only)

Field Name	Format	Required For	Columns
Record Type	2 (DA)	Add	1-2
Account	26 alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)	Add	3-28
Description	25 alphanumeric	Add	29-53
Contact	35 alphanumeric		54-88
Address Line 1	35 alphanumeric		89-123
Address Line 2	35 alphanumeric		124-158
Address Line 3	35 alphanumeric		159-193
Phone	20 alphanumeric		194-213

Fax	20 alphanumeric	214-233
Route	12 alphanumeric	234-245
Stop Group	15 alphanumeric	246-260

Disposition (Add/Edit)

Field Name	Format	Required For	Columns
Record Type	2 (DP)	Add/Edit	1-2
Disposition Code	35 alphanumeric	Add/Edit	3-37
Disposition Description	512 alphanumeric		38-549

Document (Add/Edit)

Field Name	Format	Required For	Columns
Record Type	2 (DI)	Add/Edit	1-2
Code	15 alphanumeric	Add/Edit	3-17
Description	60 alphanumeric		18-77
Position	30 alphanumeric		78-107
Additional Info	60 alphanumeric		108-167
Container Code	15 alphanumeric	Add (container or FF code, not both)	168-182
Filefolder Code	15 alphanumeric	Add (container or FF code, not both)	183-197
Add Date	10 (Windows Region/Language) Defaults to today's date		198-207
Document Type	10 alphanumeric		208-217

Document Keyword (Append/Overwrite)

Field name	Format	Required for	Columns
Record Type	2 (DK)	Insert	1-2
Document Code	15 alphanumeric	Insert	3-17
Keyword	25 alphanumeric	Insert	18-42

Filefolder Contents Text (Append/Overwrite)

Field Name	Format	Required For	Columns
Record Type	2 (FN)	Append/Overwrite	1-2
Filefolder Code	15 alphanumeric	Append/Overwrite	3-17
Contents Text	80 alphanumeric		18-97
Account Code	26 alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode	Required if filefolder code is not specified	98-123
Alternate Code	15 alphanumeric	Required if filefolder code is not specified	124-138

Filefolder Description Keywords (Append/Overwrite)

Field Name	Format	Required For	Columns

Record Type	2 (FK)	Append/Overwrite	1-2
Filefolder Code	15 alphanumeric	Append/Overwrite	3-17
Keyword	40 alphanumeric		18-57
Account Code	26 alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)	Required if filefolder code is not specified	58-83
Alternate Code	15 alphanumeric	Required if filefolder code is not specified	84-98

Filefolder Description Text (Append/Overwrite)

Field Name	Format	Required For	Columns
Record Type	2 (FD)	Append/Overwrite	1-2
Filefolder Code	15 alphanumeric	Append/Overwrite	3-17
Description Text	255 alphanumeric		18-272
Account Code	26 alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)	Required if filefolder code is not specified	273-298
Alternate Code	15 alphanumeric	Required if filefolder code is not specified	299-313

Filefolder Item (Add/Edit)

NOTE: When a new item (Add) is imported, the Item Code is a required field and must be unique. If that Item Code already exists in the database, the existing item will be updated. However, importing also identifies items based on the Item Alias. If the imported Item Code exists as an Alias Item Code, importing will match the codes and update the item that had the Alias. No exception message is generated in this case.

Field Name	Format	Required For	Columns	User Defined
Record Type	2 (FI always REQUIRED)	Add/Edit	1-2	FI
Filefolder Code	15 alphanumeric	Required for Add; Required for Edit unless using Account Code and Alternate Code	3-17	Code
Account	26 alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)	Add – If Contained-In Container is not Specified / Edit (see above)	18-43	AccountCode
Location Code	15 alphanumeric		44-58	LocationCode
Container Code	15 alphanumeric	Add – if Account is not specified	59-73	ContainerCode
Contained In Date	10 (Windows Region/Language; current date used if no value given)		74-83	
Item Status	15 (In /Out /Destroyed /Perm Out /Pending; In is used for add if no value given)		84-98	ItemStatus
Perm Flag	3 (Yes/No)	Add	99-101	PermFlag
Alternate Code	15 alphanumeric	Edit (see above)	102-116	AlternateCode
Description	40 alphanumeric		117-156	Description

Security Code	2 alphanumeric	157-158	SecurityCode
Category Code	8 alphanumeric	159-166	CategoryCode
Destroy Date	10 (Windows Region/Language)	167-176	DestroyDate
User Defined #1	25 alphanumeric	177-201	UserDefinedField1
User Defined #2	25 alphanumeric	202-226	UserDefinedField2
User Defined #3	25 alphanumeric	227-251	UserDefinedField3
User Defined #4	25 alphanumeric	252-276	UserDefinedField4
User Defined Date	10 (Windows Region/Language)	277-286	UserDefinedDate
Sequence Begin	15 alphanumeric	287-301	SequenceBegin
Sequence End	15 alphanumeric	302-316	SequenceEnd
From Date	10 (Windows Region/Language)	317-326	FromDate
To Date	10 (Windows Region/Language)	327-336	ToDate
Charge for Storage	3 (Yes/No)	337-339	ChargeforStorage
Set Name	15 alphanumeric	340-354	SetName
Add Date	10 (Windows Region/Language)	355-364	AddDate
Status Date	10 (Windows Region/Language)	365-374	StatusDate
Records Series Code	20 alphanumeric	375-394	RecordSeriesCode
Container Alt Code	15 alphanumeric (*special field*) (*special field*) (*special field*)	395-409	ContainerAlternateCode Contents LongDescription ContainedInDTIME

Filefolder Schedule (Add only)

Field Name	Format	Required For	Columns
Record Type	2 (FR)	Add	1-2
Item Code	15 alphanumeric	Add	3-17
Review Date	10 (Windows Region/Language)	Add	18-27
Description	25 alphanumeric		28-52
Review Time	5 hh:mm		53-57
Charge Account	26 alphanumeric (Level1AccountCode\Level2AccountCode\Level3AccountCode)		58-83
Workorder Account	26 alphanumeric (Level1AccountCode\Level2AccountCode\Level3AccountCode)		84-109
Type Action Code	11 alphanumeric (blank/ Access/ Delivery/ Destroy/ Pickup/ Receive)		110-120
Object Code	10 alphanumeric (Filefolder)		121-130

Quantity	14 numeric	131-144
Posted Date	10 (Windows Region/Language)	145-154
Posted Time	5 hh:mm	155-159
Apply Charge?	3 (Yes/No)	160-162
Perm Out?	3 (Yes/No)	163-165
Workorder	8 alphanumeric	166-173
Comment	81 alphanumeric	174-254
Requestor	25 alphanumeric	255-279
Cost Center	16 alphanumeric	280-295
Other Service Action	10 (leave blank)	Ignored 296-305
Material Object	10 (leave blank)	Ignored 306-315
Item Account	26 alphanumeric	Required if item code is not specified 316-341
Alternate Code	15 alphanumeric	Required if item code is not specified 342-356

Holidays (Add/Edit)

Field Name	Format	Required For	Columns
Record Type	2 (HD REQUIRED)	Add/Edit	1-2
Account	26 Alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)	If left blank – is recognized as system-wide	3-28
Holiday Date	10 (Windows Region/Language)	Add/Edit	29-38
Description	20 alphanumeric		39-58

Invoice Cycle (Add/Edit)

Field Name	Format	Required For	Columns
Record Type	2 (IC)	Add/Edit	1-2
Invoice Cycle Code	5 alphanumeric	Add/Edit	3-7
Invoice Cycle Description	25 alphanumeric		8-32

Invoice Schedule Date Ranges (Add)

Field Name	Format	Required For	Columns
Record Type	2 (IP)	Add	1-2
Invoice Schedule Code	15 alphanumeric	Add	3-17
Invoice Period Begin	10 (Windows Region/Language)	Add	18-27
Invoice Period End	10 (Windows Region/Language)	Add	28-37

Legal Citation (Add/Edit)

Field Name	Format	Required For	Columns
Record Type	2 (LC)	Add/Edit	1-2
Code	20 alphanumeric	Add/Edit	3-22

Title	80 alphanumeric	23-102
Legal Citation Type	20 alphanumeric	103-122
Retention Requirement	5 numeric	123-127
Retention Unit	5 alphanumeric	128-132
Law Act Code	20 alphanumeric	133-152
Law Act Code Title	40 alphanumeric	153-192
Section	40 alphanumeric	193-232
Jurisdiction	40 alphanumeric	233-272
Description	512 alphanumeric	273-784

Legal Citation Type (Add/Edit)

Field Name	Format	Required For	Columns
Record Type	2 (LT)	Add/Edit	1-2
Legal Citation Type Code	20 alphanumeric	Add/Edit	3-22
Legal Citation Type Description	80 alphanumeric		23-102

Location (Add/Edit)

Field Name	Format	Required For	Columns
Record Type	2 (LL)	Add/Edit	1-2
Location Code	15 alphanumeric	Add/Edit	3-17
Object Code	10 alphanumeric	Add – cannot be edited	18-27
Holding Area	12 (No/In-Coming/Out-Going)	Add – cannot be edited	28-39
Location Description	15 alphanumeric		40-54
Capacity	7 numeric	Add	55-61
Current Quantity	7 numeric	Cannot be edited	62-68
Account	26 alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)	Cannot be edited	69-94
Building	4 alphanumeric		95-98
Floor	4 alphanumeric		98-101
Room	4 alphanumeric		102-105

Miscellaneous Scheduling (Add only)

Field Name	Format	Required For	Columns
Record Type	2 (MR)	Add	1-2
Item Code	15 (Leave blank)	Ignored	3-17
Review Date	10 (Windows Region/Language)	Add	18-27
Description	25 alphanumeric		28-52
Review Time	5 hh:mm		53-57
Charge Account	26 alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)		58-83

Workorder Account	26 alphanumeric (Level1AccountCode\Level2AccountCode\Level3AccountCode)		84-109
Type Action Code	11 alphanumeric (PICKUP/ RECEIVE/ OTHERSERVI/ CHARGECCRRED/ SELL)	Add	110-120
Object Code	10 alphanumeric (PICKUP/ RECEIVE: CONTAINER/ FILEFOLDER/ TAPE; defaults to CONTAINER; OTHERSERVI/CHARGECCRRED: ignored; defaults to CLIENT; SELL: ignored; defaults to MATERIAL)		121-130
Quantity	14 numeric		131-144
Posted Date	10 (Windows Region/Language)		145-154
Posted Time	5 hh:mm		155-159
Apply Charge?	3 (Yes/No)		160-162
Perm Out?	3 (Leave blank)	Ignored	163-165
Workorder	8 alphanumeric		166-172
Comment	81 alphanumeric		174-254
Requestor	25 alphanumeric		255-279
Cost Center	16 alphanumeric		280-295
Other Services Action	10 alphanumeric	Add; for OTHERSERVI only	296-305
Material Object	10 alphanumeric	Add; for SELL only	306-315

Objects

Field Name	Format	Required For	Columns
Record Type	2 (please see table below)	Add/Edit	1-2
Object Code	10 alphanumeric	Add/Edit	3-12
Object Description	25 alphanumeric		13-37
Unit Volume	20 numeric		38-57

Object Code	Record Type	Import Action
Base Object	BO	Edit only
Container Object	CO	Add/Edit
Material Object	MO	Add/Edit
Tape Object	TO	Add/Edit

Record Series (Add/Edit)

Field Name	Format	Required For	Columns
Record Type	2 (RS)	Add/Edit	1-2
Code	20 alphanumeric	Add/Edit	3-22
Title	80 alphanumeric		23-102

Review Reason (Add/Edit)

Field Name	Format	Required For	Columns
Record Type	2 (RR)	Add/Edit	1-2

Review Reason	5 alphanumeric	Add/Edit	3-7
Account	26 alphanumeric (Level1AccountCode\Level2AccountCode\Level3AccountCode)	Add/Edit	8-33
Category Code	8 alphanumeric	Add/Edit	34-41
Review Description	25 alphanumeric		42-66
Days	8 numeric		67-74
Object Code	10 alphanumeric	Add/Edit	75-84

Security Level (Add/Edit)

Field Name	Format	Required For	Columns
Record Type	2 (SL)	Add/Edit	1-2
Security Code	2 alphanumeric	Add/Edit	3-4
Security Description	25 alphanumeric		5-29

Tape Contents Text (Append/Overwrite)

Field Name	Format	Required For	Columns
Record Type	2 (TN)	Append/Overwrite	1-2
Tape Code	15 alphanumeric	Append/Overwrite	3-17
Contents Text	80 alphanumeric		18-97
Account Code	26 alphanumeric (Level1AccountCode\Level2AccountCode\Level3AccountCode)	Required if tape code is not specified	98-123
Alternate Code	15 alphanumeric	Required if tape code is not specified	124-138

Tape Description Keywords (Append/Overwrite)

Field Name	Format	Required For	Columns
Record Type	2 (TK)	Append/Overwrite	1-2
Tape Code	15 alphanumeric	Append/Overwrite	3-17
Keyword	40 alphanumeric		18-57
Account Code	26 alphanumeric (Level1AccountCode\Level2AccountCode\Level3AccountCode)	Required if tape code is not specified	58-83
Alternate Code	15 alphanumeric	Required if tape code is not specified	84-98

Tape Description Text (Append/Overwrite)

Field Name	Format	Required For	Columns
Record Type	2 (TD)	Append/Overwrite	1-2
Tape Code	15 alphanumeric	Append/Overwrite	3-17
Description Text	255 alphanumeric		18-272
Account Code	26 alphanumeric (Level1AccountCode\Level2AccountCode\Level3AccountCode)	Required if tape code is not specified	273-298

Alternate Code	15 alphanumeric	Required if tape code is not specified	299-313
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Tape Item (Add/Edit)

NOTE: When a new item (Add) is imported, the Item Code is a required field and must be unique. If that Item Code already exists in the database, the existing item will be updated. However, importing also identifies items based on the Item Alias. If the imported Item Code exists as an Alias Item Code, importing will match the codes and update the item that had the Alias. No exception message is generated in this case.

Field Name	Format	Required For	Columns	User Defined
Record Type	2 (TI)	Add/Edit	1-2	TI
Tape Code	15 alphanumeric	Required for Add; Required for Edit unless using Account Code and Alternate Code	3-17	Code
Account	26 alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)	Add – if Contained-In Container is not specified / Edit (see above)	18-43	AccountCode
Location Code	15 alphanumeric		44-58	LocationCode
Container Code	15 alphanumeric	Add – if Account is not specified	59-73	ContainerCode
Contained In Date	10 (Windows Region/Language; current date used if no value given)		74-83	
Item Status	15 (In /Out /Destroyed /Perm Out /Pending; In is used for add if no value given)		84-98	ItemStatus
Perm Flag	3 (Yes/No)	Add	99-101	PermFlag
Alternate Code	15 alphanumeric	Edit (see above)	102-116	AlternateCode
Description	40 alphanumeric		117-156	Description
Security Code	2 alphanumeric		157-158	SecurityCode
Category Code	8 alphanumeric		159-166	CategoryCode
Sequence Begin	15 alphanumeric		167-181	SequenceBegin
Sequence End	15 alphanumeric		182-196	SequenceEnd
From Date	10 (Windows Region/Language)		197-206	FromDate
To Date	10 (Windows Region/Language)		207-216	ToDate
Destroy Date	10 (Windows Region/Language)		217-226	DestroyDate
User Defined #1	25 alphanumeric		227-251	UserDefinedField1
User Defined #2	25 alphanumeric		252-276	UserDefinedField2
User Defined #3	25 alphanumeric		277-301	UserDefinedField3
User Defined #4	25 alphanumeric		302-326	UserDefinedField4
User Defined Date	10 (Windows Region/Language)		327-336	UserDefinedDate
Charge for Storage	3 (Yes/No)		337-339	ChargeforStorage
Set Name	15 alphanumeric		340-354	SetName
Object Code	10 alphanumeric		355-364	ObjectCode

Add Date	10 (Windows Region/Language)	365-374	AddDate
Status Date	10 (Windows Region/Language)	375-384	StatusDate
Record Series Code	20 alphanumeric	385-404	RecordSeriesCode
Container Alt Code	15 alphanumeric	405-419	ContainerAlternateCode
	Add/Edit - Required if container code is not specified		
	(*special field*)		Contents
	(*special field*)		LongDescription
	(*special field*)		ContainedInDTime

Tape Schedule (Add only)

Field Name	Format	Required For	Columns
Record Type	2 (TR)	Add	1-2
Item Code	15 alphanumeric	Add	3-17
Review Date	10 (Windows Region/Language)	Add	18-27
Description	25 alphanumeric		28-52
Review Time	5 hh:mm		53-57
Charge Account	26 alphanumeric (Level1AccountCode\Level2AccountCode\ Level3AccountCode)		58-83
Workorder Account	26 alphanumeric (Level1AccountCode\Level2AccountCode\ Level3AccountCode)		84-109
Type Action Code	11 alphanumeric (blank/ Access/ Delivery/ Destroy/ Pickup/ Receive)		110-120
Object Code	10 alphanumeric (Tape)		121-130
Quantity	14 numeric		131-144
Posted Date	10 (Windows Region/Language)		145-154
Posted Time	5 hh:mm		155-159
Apply Charge?	3 (Yes/No)		160-162
Perm Out?	3 (Yes/No)		163-165
Workorder	8 alphanumeric		166-173
Comment	81 alphanumeric		174-254
Requestor	25 alphanumeric		255-279
Cost Center	16 alphanumeric		280-295
Other Service Action	10 (leave blank)	Ignored	296-357
Material Object	10 (leave blank)	Ignored	306-315
Item Account	26 alphanumeric	Required if item code is not specified	316-341
Alternate Code	15 alphanumeric	Required if item code is not specified	342-356

Translation (Edit only)

Field Name	Format	Required For	Columns
Record Type	2 (TT)	Edit	1-2
BaseTableName	32 alphanumeric	Edit	3-34

BaseTableTextID	9 numeric	Edit	35-43
Language Description	32 alphanumeric	Edit	44-75
Translation	6000 alphanumeric	Edit	76-6075

User (Add/Edit)

Field Name	Format	Required For	Columns
Record Type	2 (UL)	Add/Edit	1-2
User Code	11 alphanumeric	Add/Edit	3-13
Password	30 alphanumeric	Add – ignored for Edit	14-43
User Type	25 (Standard/ Web User/ Report User/ Model User/ Remote Employee/ Remote Customer)	Add	44-68
User Status	25 (Active/Inactive)	Add	69-93
Account Access	25 (NONE by default/ALL by default)	Add	94-118
Last Name	30 alphanumeric		119-148
First Name	30 alphanumeric		149-178
Barcode ID	5 alphanumeric		179-183
Item Security Code	2 alphanumeric		184-185
Language Code	32 alphanumeric		186-217
Email Address	128 alphanumeric		218-345
Net Send Address	64 alphanumeric		346-409
RSMobile Password	6 alphanumeric		410-415
Password Change Required	3 (Yes/No)		416-418
Ignore User Policies	3 (Yes/No)		419-421
User Locked Out	3 (Yes/No)		422-424
Account Model User Code	11 alphanumeric		425-435
Function Model User Code	11 alphanumeric		436-446
Web Model User Code	11 alphanumeric		447-457
Material Model User Code	11 alphanumeric		458-468
RSWeb.NET Material List Name	24 alphanumeric		469-492
Allow Notification	3 (Yes/No)		493-495
Notify Also User Code	11 alphanumeric		496-506
Notify Minimum Interval	9 numeric		507-515
Prefer HTML Email	3 (Yes/No)		516-518

User Account Access (Add only)

Field Name	Format	Required For	Columns
Record Type	2 (UA)	Add	1-2
User Code	11 alphanumeric	Add	3-13
Account	26 alphanumeric (Level1AccountCode\ Level2AccountCode\ Level3AccountCode)	Add	14-39

Examples

Following is an example of a Container Import Record in the three formats:

Delimited with | as the delimiter

```
CI|000009|2000\1044\1022|00001|In|No|TC002||CAN
CKS|Q|R|02/01/2007|02/15/2008||UDF1|UDF2|UDF3|UDF4|02/15/2008|Yes||CONTAINER||08/08/2007|08/08/2007||
```

If you put quotes in the field that is blank (has two || in a row) it causes the field to be blank. If you do not put quotes in the field, anything currently in the field is left.

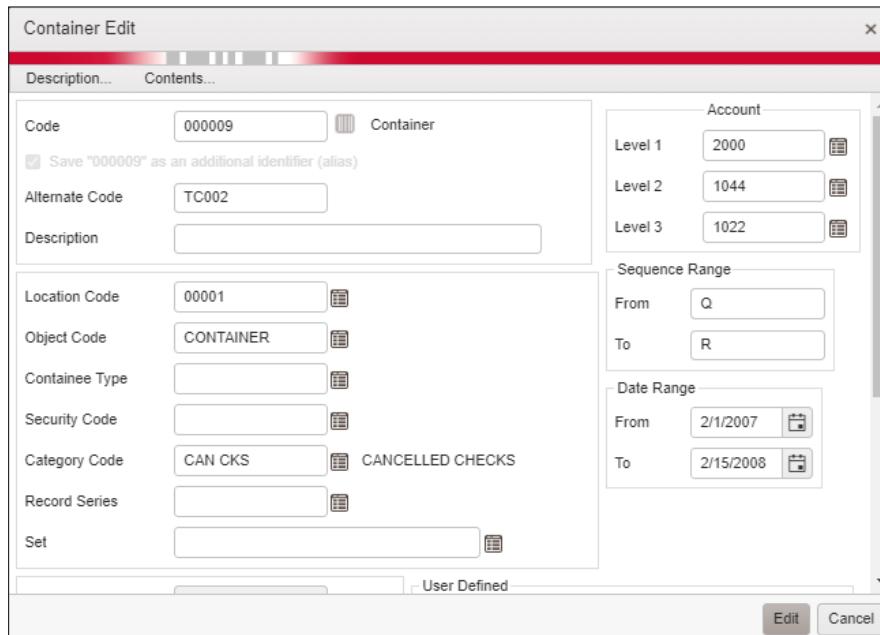
Delimited with Quotes

```
CI|"000009"|"2000\1044\1022"|"00001"|"In"|"No"|"TC002"||"CAN"
CKS|"Q"|"R"|"02/01/07"|"02/15/08"||"UDF1"|"UDF2"|"UDF3"|"UDF4"|"02/15/2008"|"Yes"|"CONTAINER"||"0
8/08/2007"|"08/08/2007"||"
```

Fixed

CI000009	2000\1044\1022	00001	In	No	TC002	CAN	CKS	Q	R
02/01/2007	02/15/2008	UDF1	UDF2	UDF3	UDF4	02/15/2008	Yes		
CONTAINER		08/08/2007	08/08/2007						

This information would import into the system and, when the **Container Edit** dialog for this container is accessed, the information would appear as shown.



Exceptions

When O'Neil Stratus cannot properly incorporate import data into the system, it generates exceptions. These exceptions appear in the **Exceptions** grid, found under the **Administration** menu, **Maintenance** submenu, **Exceptions** option.

The Exception Code gives a numeric value for the exception, and the Exception Message tells you what the problem was in the import. Once you know what the problem is, you can correct it. Below is a list of all the Import Exception Codes:

Messages

- Account Access not valid
- Account Access required
- Account closed to user
- Account not valid
- Account required
- Action Code not valid
- Action Code required
- Action-Object pair not valid
- Add not allowed
- Alternate ID already exists in this account
- *Alternate id ambiguous*
- Barcode ID already exists
- Barcode Length already exist
- Barcode Length required
- Begin range cannot be after the ending range
- Beginning and ending range lengths must be the same
- Beginning or ending number falls within another defined range
- Bill Forward Period Length should be from 1 to 12
- Category Code not valid
- Category Code required
- Chart of Accounts Account Code required
- Containee type not valid
- Container Type: container holding items of different types
- Container Code not valid
- Container required
- Could not add/update item set name
- Could not delete previous quantity break
- Date not valid
- Date Range not valid
- Destination and item types incompatible
- Delimiter was expected
- *Either item id or account and alternate id required*

- Field length not valid
- Filefolder required
- Holding Area not valid
- Holding Area required
- Invalid length for barcode ID
- Invoice Cycle not valid
- Invoice Cycle required
- Item does not exist
- Item Status not valid
- Item Status required
- Last Name required
- Length not valid for Container
- Length not valid for Filefolder
- Length not valid for Location
- Length not valid for Tape
- Level 1 Account not valid
- Level 2 Account not valid
- Location already exists
- Location belongs to another account
- Location capacity required
- Location not valid
- Location required
- Maximum Bill Forward Start Year is 9999
- Moving an item to a location of a different type is not allowed
- No global memory
- Not a valid length for specified object
- Object Code not valid
- Object Code required
- Putting an item into a container of a different containee type is not allowed
- Quantity Break not allowed
- Quantity Break required
- Quantity Break Target not valid
- Quote was expected
- Record length not valid
- Record not valid for table
- Review Code required

- Review Date required
- Security Code not valid
- Security Code required
- Security Code should be 2 digits
- Sep Invoice for Acct L1 should be Yes
- Separate Invoice not valid
- Separate Invoice required
- Sequence Range not valid
- Tape required
- Transaction does not exist
- *Update not permitted based on Account criteria*
- User aborted
- User Acct Access already exist
- User Code not valid
- User Code required
- User status not valid
- Warning: Item added to location exceeding capacity
- Warning: Moving item into destination of different sub-type
- Warning: Object type ignored
- Yes/No required

* denotes errors specific to Customer Transmittal importing

Activity Sets

Activity Sets

Record centers, like many other businesses, have a business cycle that can be outlined as follows:

- A customer makes requests that are formally noted and summarized.
- The business meets the request by providing the services or goods to the client.
- The business sends the client a formal request for payment, summarizing the work done and the cost to the customer.

To keep customers you must provide good, reliable service on a regular basis. But good service is only the prerequisite. In addition to good service, you must demonstrate that you are providing the customer with good value. This is an easier proposition in, say, a department store than a record center. In a big department store a customer may be able to order a new pair of shoes, a garden hose, and a brake system repair on his automobile. He would get a receipt for each, and at the end of the month the department store would send him a billing statement that itemizes his charges on his department store credit card. The relationship between service and value is simple and straightforward because the department store's interaction with the customer is simple and straightforward.

The relationship between a record center and its clients is more complex than the example above. Special services you provide for a client may be specific to that client and not obvious. You may have negotiated a complex pricing structure with a client.

In order for you to illustrate the value of your work for a client, you must first capture all the work that you have done for him. Activity Sets provide a way for you to tailor how you capture the detailed history of the services you provide a client.

O'Neil Stratus provides you with different ways for manipulating the Objects of your business. For example, you can Add and Refile Containers by processing the barcode information from a handheld data collection device, by importing into the system from an import file or by using the **Container Add/Edit** dialog box. When O'Neil Stratus captures this historical event, say the addition of a standard record container for ABC Corp. to your record center, it uses Activity Sets and the source of the data (a handheld device, an import file, or a dialog box) to figure out how to record the event. By setting up the appropriate Activity Set with a list of Activities that you perform for a client when he sends you a new box for storage, you effectively set up a template, structure, or model that O'Neil Stratus uses to record the event.

Having captured the services provided to a client through Activity Sets, the record center has not only a detailed, tailored history, but the basic elements that go into composing a detailed, tailored invoice--one that can better explain to the client the value behind the dollar amounts.

Setting up Activity Sets

When you work with Activity Sets, keep in mind that Base Activity Sets are already established in the system. You may not add new Base Activity Sets, but you may edit them to include more actions. You may Add Account Activity Sets, as there are none originally set up in the system. For details on Editing Base Activity Sets and Adding Account Activity Sets, please see the sections below.

For a complete listing of Base Activity Sets and their system-assigned codes, please see the Activity section of the *Maintenance* chapter.

Base Activity Sets

Each Base Activity Set has initially a single default Action. For example, the default Action for adding an item by handheld device, import, or dialog box is the same. This may be all the detail you need to describe the Add event.

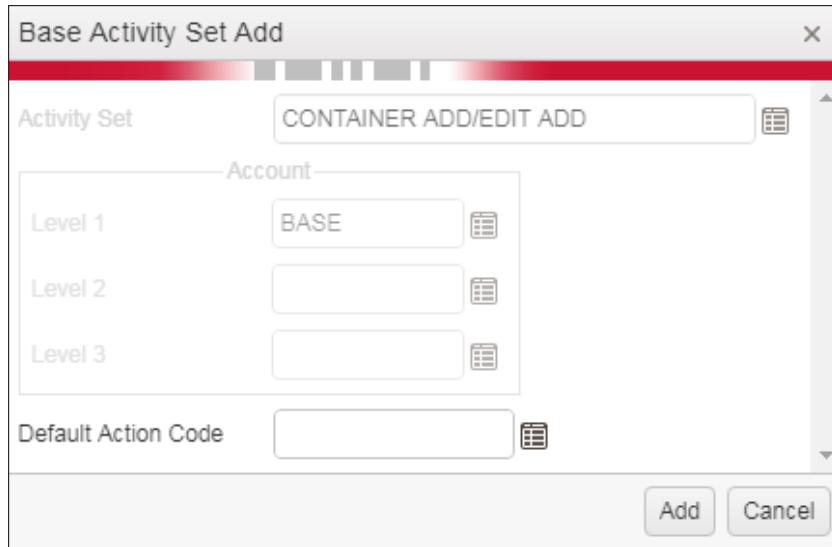
If you need more detail than this--say it is important to distinguish between Container Adds that were done by handheld device and those that were added through import--then you can replace the default action with a more specific or descriptive one. Or, rather than replace the default action, you can insert an additional action in the activity set so that each time an Add Container event happens, two actions for that container are placed in the history for that container.

Say you want to add the action Refile to all Container Adds done manually. From the **Administration** menu, **Activity Set** submenu, select **Base Activity Sets**. The **Base Activity Set** grid appears with all Base Activity Sets already loaded. These sets are already established in the system when you receive it. You may not create new Base Activity Sets, but you may edit or add to an existing one. To add the action Refile to Container Adds, right click on Container Add/Edit ADD, and select **Edit**. The **Base Activity Set** grid appears with all actions associated with that activity set listed. At this time, it should only have Add, as shown below.

Record Storage Base Activity Set		
Options Format Mark Clear X		
	Name	Action Code
1	CONTAINER Add/Edit ADD	ADD

◀
▶
1
◀
▶
100
▼
items per page
1 - 1 of 1 items
↻

To add the new Activity Set, right click anywhere in the grid and select **Add**. The **Activity Set Add** dialog box appears, and you are able to select another action to be associated with the Container Add action. Select the Action Code REFILE.



Click **Add** and the new action appears under the Add action in the **Activity Set** grid. Now whenever a Container is added to the system, a Refile action also occurs. Since this is a Base Activity Set, this applies to all accounts.

In summary, by the directives or actions you place in Activity Sets you define what to record when a record center event occurs.

In the Transactions section of O'Neil Stratus, you can associate charges for each type of Action/Object pair that has been captured in the history of events for your clients. O'Neil Stratus invoicing takes the events captured in the client history, associates them with a charge established in Transactions, and displays them on an invoice.

Base Activity Sets apply to every account in the system, but Account Activity Sets override the Base Activity Sets for a specific Account. Base Activity Sets have been established in the system, and upon receipt of the system, each includes just one standard action. You can add more actions to each set in situations where it is needed.

Account Activity Sets: Example

When a new account is set up in O'Neil Stratus, it uses the Base Activity Sets until you create Account Activity Sets to override them. Account Activity Sets override Base Activity Sets for individual accounts.

For example, the Base Activity Set called CONTAINER Comm Session REFILE originally just contains the action Refile. The action refile is recorded for every account every time a container is refiled via Comm Session processing. But suppose ABC Corp. insists that you repack each of its boxes when it returns them after having them out. You want to provide this service for ABC Corp., and you also want it reflected in the history of work you do for them for both invoicing and management reasons. This is a service that you provide to no other customer. For you to capture the repacking activity for ABC Corp., all that is initially required is that you create an Account Activity Set for them. The Account Activity Set to adjust is Container Comm Session REFILE because this is the set the system uses when you refile a container by scanning it onto a shelf, and then uploading it to the system.

From the **Administration** menu, **Activity Set** submenu, select **Account Activity Set**. The **Account Activity Set** grid appears, and is empty. Right click anywhere in the grid and select **Add**. The **Account Activity Set Add** dialog box appears.

The screenshot shows a software dialog titled "Account Activity Set Add". It includes fields for entering an "Activity Set" name, selecting accounts at three levels (Level 1, Level 2, Level 3) using grid pickers, and specifying a "Default Action Code" using a grid picker. There are "Add" and "Cancel" buttons at the bottom.

Click the grid picker next to the Activity Set field. Right click CONTAINER Comm Session REFILE, and select OK.

In the Account Level 1 field click the grid picker to display all accounts in the system are displayed. Right click on the one you want, and select OK.

In the Default Action Code field, type in REFILE, or select it from the grid picker.

This enters Refile as the first action in the Activity Set.

Click **Add** and then **Cancel** to return to the **Account Activity Set** grid. The Activity Set you just created appears on the grid and is highlighted.

At this point the CONTAINER Comm Session REFILE activity set has only the REFILE Action in it. This is exactly the same as the Base Activity Set for CONTAINER Comm Session REFILE, so you need to add REPACK.

Right click on the activity set and select **Edit**.

Another grid appears that has a single entry in it reflecting the REFILE Action for the CONTAINER Comm Session REFILE activity set. Right click anywhere in the grid and select **Add** to add another Action to the new Activity Set. You may type in the new action REPACK or select it from the dropdown list. Click **Add** and then **Cancel** to return to the **Account Activity Set** grid.

Now the CONTAINER Comm Session REFILE activity set has two actions associated with it.

Now, any time that ABC Corp's Containers are refilled through Comm Session processing, O'Neil Stratus records REFILE and REPACK actions in the Activity file. None of your other accounts have this action posted to their work histories.

We could have created a single action called REFILE-REPACK and used it alone for ABC Corp's Refile Activity Set rather than using a pair of actions. This would have worked; however, a level of detail would have been lost. For example, suppose ABC Corp. wants to know how many refills it has done over a period of time. The history file now has two ways of capturing refills: a simple REFILE action for most accounts and the combination REFILE-REPACK for ABC Corp. A search that merely looked for REFILE actions would miss the REFILE-REPACK actions.

Monitors

Overview

Monitors, in the most basic sense, facilitate the scheduled automatic execution of queries. Each automatically executed query places its results, if any, in a List. Monitors are executed as scheduled, without user intervention, and regardless of whether or not any users are logged in.

The scheduling of monitors is extremely flexible and reliable. Monitors can be scheduled to run after-hours, on weekends, every other week, twice a day, or in just about any other conceivable manner. This flexibility makes it easy to perform long-running queries during off-peak hours, and allows valuable business and account-specific information to be gathered at regular intervals.

Monitors can also be configured to leverage email notification. Each time a monitor's scheduled execution completes, email containing the monitor name, the name of the List created, and the number of records in that List, can be automatically sent to any number of recipients. Monitor notification conveniently appears in each recipient's usual email inbox.

Monitors provide a detailed history of scheduled execution status, and notification information. This History can be used to ease monitor maintenance and verify accountability.

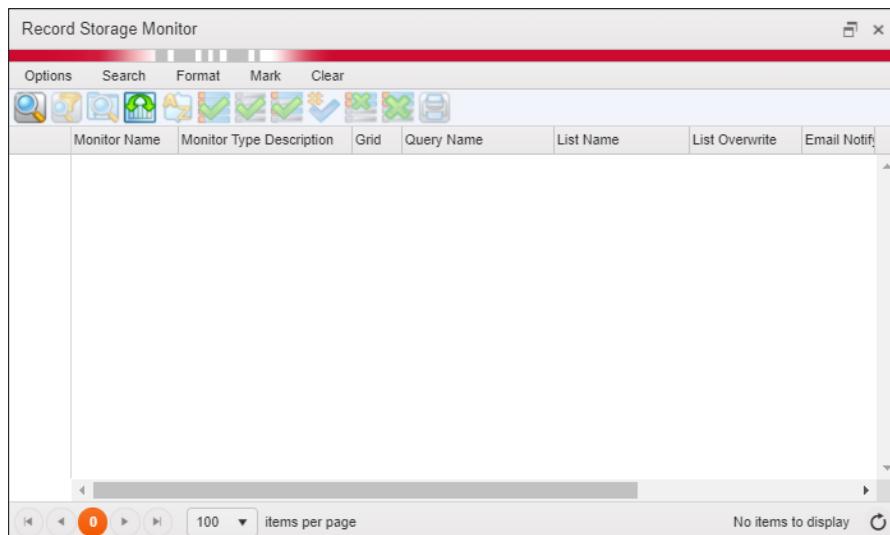
Finally, a number of special non-standard monitor queries are provided. These queries involve logic and functionality not available using standard O'Neil Stratus queries. Typically, these non-standard monitors provide business information, for example untimely workorder delivery, untimely refile activity, or inactive accounts.

Monitor Configuration

Before you set up a monitor to run, two activities must take place. You must determine who should receive notification when it runs, and in the **User** area of O'Neil Stratus, add those users to a List. Also, if you are running a standard monitor where you determine the query, the query must be saved in the system. You need to reference the name of the User List and the name of the Query when you set up your monitor. For more information on creating Lists and saving Queries, please refer to those chapters in the Operations User's Guide.

All monitor functions may be performed by any user who has sufficient Function Access rights granted within the O'Neil Stratus system.

From the **Administration** menu, select **Monitor**.



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

Monitor Name

You must give your monitor a name. This name is used when the system notifies you that the monitor has run. Give it a name that helps you easily identify its purpose.

Monitor Type

There are two types of monitors: Standard and Non-Standard.

Standard Monitor

A standard monitor contains a query that is created in a grid. It may be a query that can take some time to process. Through the monitor function you can schedule a convenient time for that query to run.

If you are setting up a standard monitor, you need to tell the system what grid your query was created on. Once the grid is listed in the Table field, all queries saved in that grid are available in the Query field. Select the one you want the monitor to run.

Non-Standard Monitor

A non-standard monitor is one that cannot be created through queries, but has been included with the system. A list of non-standard monitors and their descriptions is listed later in this chapter.

If you are setting up a non-standard monitor, simply choose the one you want from the drop-down list. Many non-standard monitors require that you include information to help set them up. If the one you chose requires additional setup, the **Setup** button becomes available. When you click it, a dialog box comes up with the required fields. For more information on individual Setup dialogs, refer to the list of Non-Standard Monitors later in this chapter.

Notification

The Notification area allows you to tell the system who needs to be notified each time the monitor runs. Click the grid picker next to the **E-Mail List** field to display all Lists that have been saved in the **User** grid. When the monitor runs, each user on the List is notified by e-mail that the monitor ran and where the results can be found.

You can also choose to include an external e-mail address. For information about setting up e-mail users, see the *Security/User Access* chapter in this manual.

Notify only if result is not empty or condition is true

If you do not want to receive notification of a monitor's run when there is nothing in the list, select this option. For example, if you are running a monitor to find all containers that were delivered after their scheduled delivery time, you may only want the results if there were late deliveries.

Result Set

Once the monitor has run, it creates a list of items. Use this field to name that list. Again, use a name that helps you recognize the list when you see it. The list created by monitors is marked Public Access and No Owner which means it can be viewed and deleted by any user.

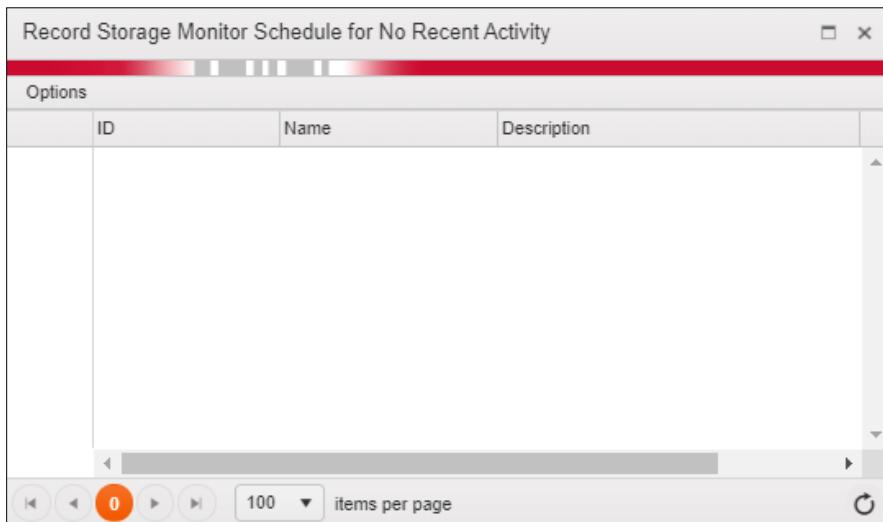
Number from 000 to 999

Selecting this check box causes the system to give your list a number of 000. The second time the same monitor is run, the system saves it with the number 001. If this option is not selected, the second time the monitor is run, it overwrites the first list.

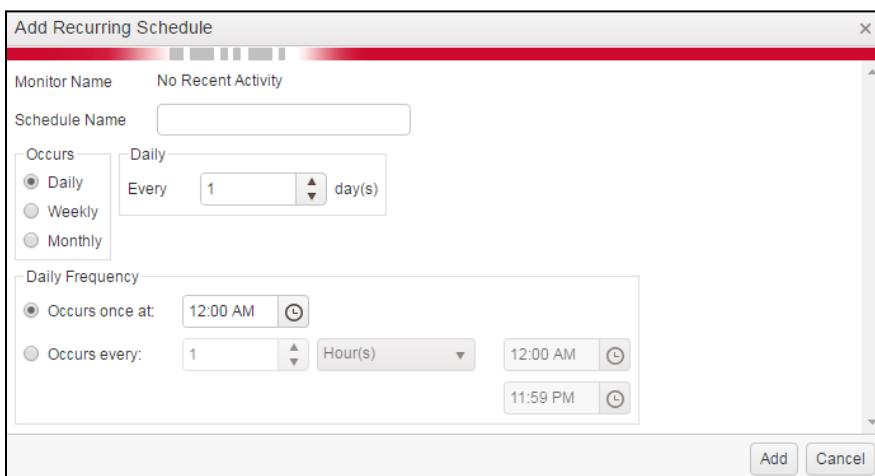
Monitor Schedule and History

Schedule your Monitor

Once your monitor has been configured, you must tell the system when you want it to run. From the **Monitor** grid, right click on the monitor and select **Schedule**.



You can have more than one schedule for any given monitor. To create a schedule, right click anywhere in the grid and select **Add**.



Monitor and Schedule Name

The Monitor Name is the one you gave it when you set it up. Enter a Schedule Name.

Occurs Daily / Weekly / Monthly and Frequency

These fields let you tell the system how often your monitor should run. If you choose Daily, you are given the option of every ___ days.

Daily
Every 1 day(s)

Daily Weekly Monthly

If you select Weekly, you can choose to select how many weeks will pass between runs, and on what day the run is to take place.

Weekly
Every 1 week(s) on:
Mon Tue Wed Thu Fri Sat Sun

If you select Monthly, you can select which date of each month, or which day (e.g. first Monday) of the month.

Monthly
Day 1 of every 1 month(s)
The 1st Sunday of every 1 month(s)

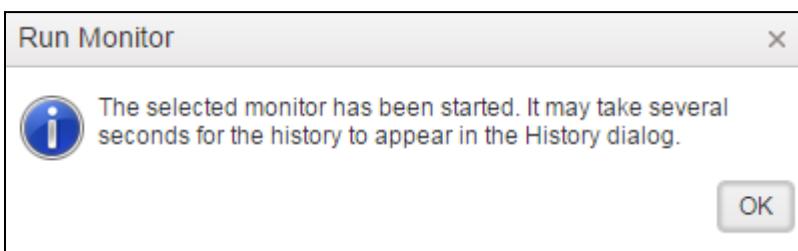
Using these controls, you can create as simple or complicated a schedule as you, or your customer, requires.

The Daily Frequency fields allow you to schedule your monitor to occur one or a number of times throughout the day, at what intervals and when the schedule should start and stop.

The system is only capable of executing eight jobs at any point in time. For this reason, you should ensure that no more than eight monitors are scheduled to execute simultaneously. For example, if you have 18 monitors that you would like to run every weekday at 5:00 am, consider scheduling six to start at 5:00, six at 5:10, and six at 5:20. This staggering of schedules assumes that execution times for the monitors are less than ten minutes. Depending on the time required to complete your queries, you might stagger at shorter or longer intervals.

Run Now

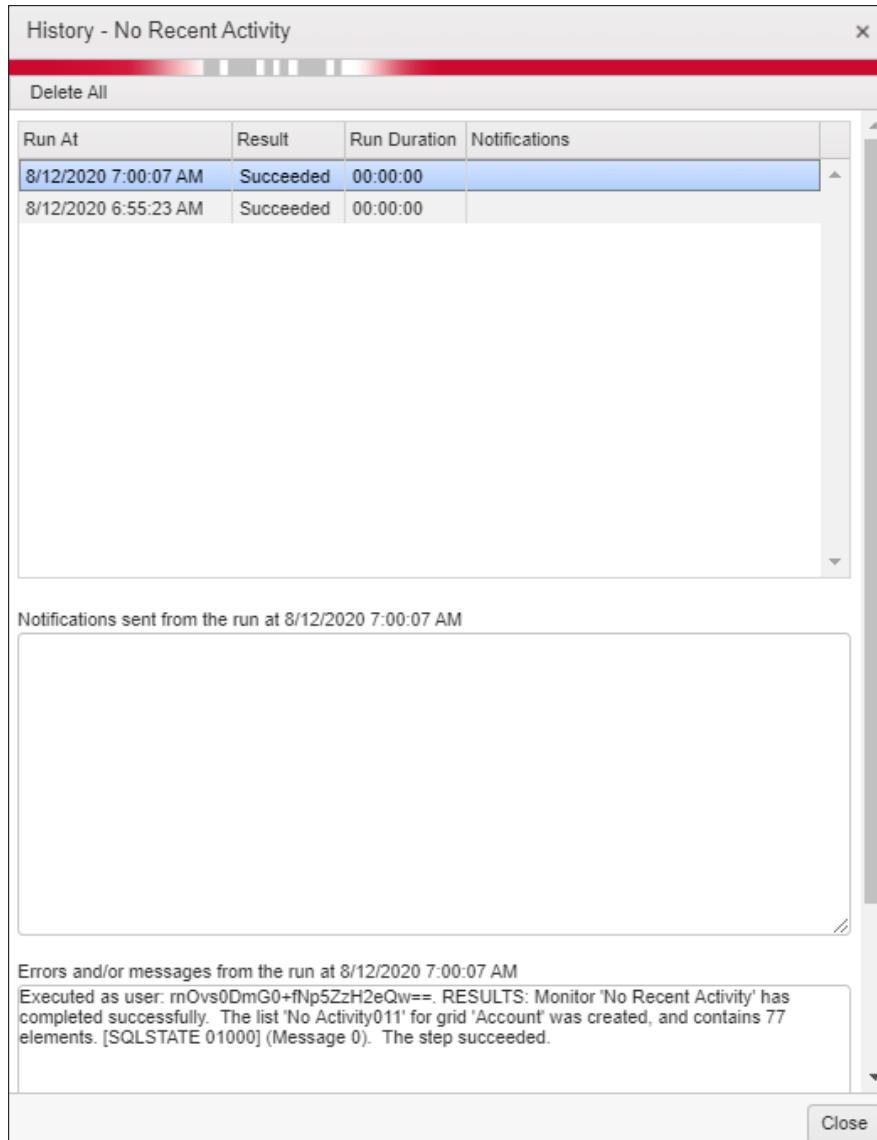
Once your monitor has been scheduled and appears on the **Monitors** grid, you can run it immediately. Right click on the monitor and select **Run Now**. You receive the following notice.



Once the monitor has finished running, the history appears in the **History** dialog box.

Viewing Job History

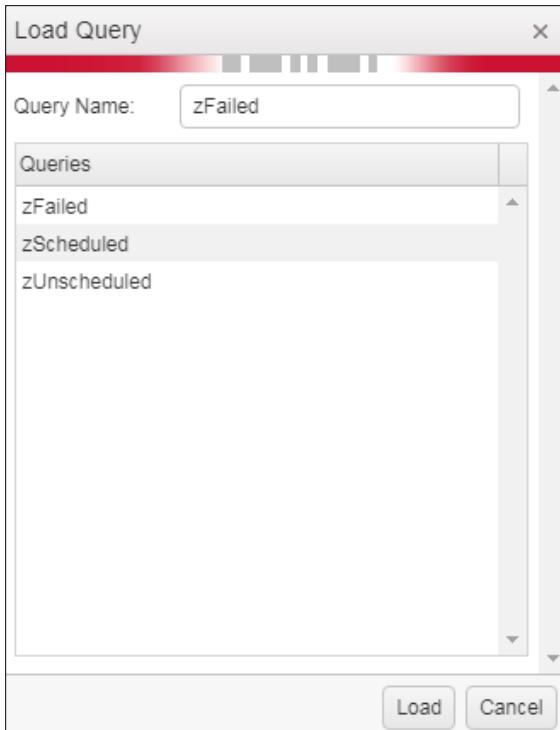
Each time a monitor runs, a record of it is kept in a history file. To view the history of a monitor, from the **Monitor** grid, right click on the monitor and select **History**.



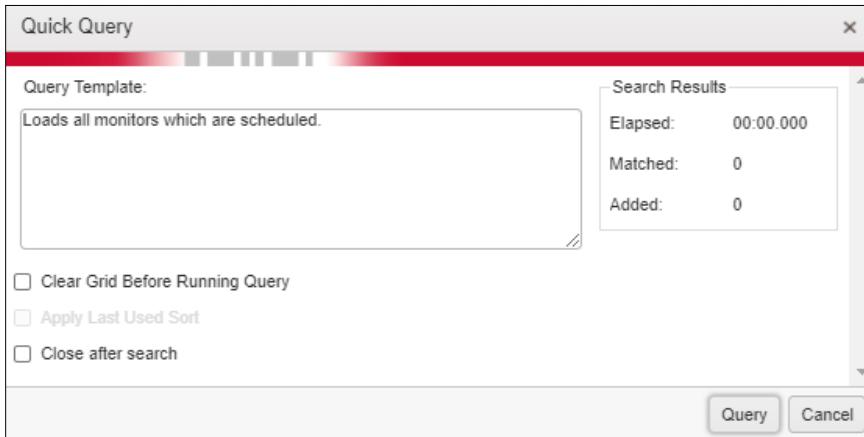
The dialog box lists each time the monitor ran, whether it succeeded or failed, how long it took to run, and the name of the person notified when it finished. Information for the highlighted run appears in the lower two fields. The first lists all the people who received notification. The bottom lists any errors that occurred (if they occurred) and a message that tells the name of the monitor, if it ran correctly, and how many items appeared on the resulting list.

Predefined Queries

The **Monitor** grid, like most other grids in O'Neil Stratus is programmed with a set of predefined queries that you might find helpful. These queries are not readily available for you to create on your own, so O'Neil offers them through the use of the **F6** key.



The predefined queries that are available on this grid include monitors that have failed to run properly, monitors that are currently scheduled to run, and monitors that are not scheduled to run. Highlight the one you want and click **Load**. The **Quick Query** dialog box appears with the query already loaded.



Click **Query** to complete the query.

Non-Standard Monitor Descriptions

The non-standard monitors differ from other monitors in that their underlying queries are already defined as part of O’Neil Stratus. These queries involve logic and functionality not available using standard O’Neil Stratus queries. Additionally, each non-standard monitor has its own custom **Setup** dialog box, which allows it to be tailored using parameters that you specify. In all other respects, such as scheduling, notification, and execution history, these non-standard monitors are no different from any other monitor.

Many of the non-standard monitors focus on timely business activity. For example, three monitors report on items being placed on a Delivery Workorder that were not “Delivery Validated” within a specified number of hours of being placed on that workorder. There are three of these monitors, because one exists for

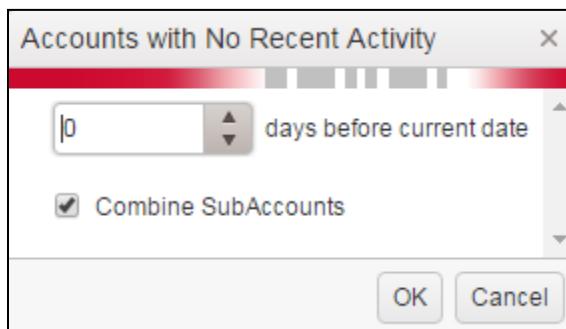
containers, one for filefolders, and one for tapes. This type of monitor can help manage quality control, and monitor aberrations in your normal business activities.

The following sections describe each type of non-standard monitor, as well as their custom setup dialog box and the meanings of all their parameters. The type of List that the monitor creates is displayed within parentheses in the section heading. Certain monitors differ only in the type of item examined; container, filefolder, or tape. These monitors are described only once, since the description applies to each of the three item types listed in the section heading.

Accounts with No Recent Activity (Account)

This non-standard monitor attempts to find all accounts with no activity within a specified number of days prior to today. Optionally, it combines sub-accounts when determining and reporting on inactivity. For the purposes of this monitor, “activity” is defined as any activity record for any item belonging to the account being examined.

Once this monitor is selected, click **Setup** to further define the query to be executed.

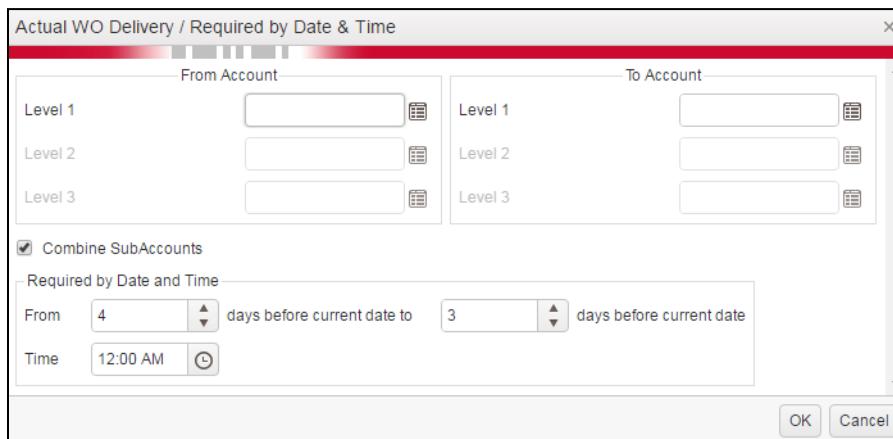


It allows you to determine the number of days without activity, and whether or not any subaccounts are included in the List.

Actual WO Delivery / Required by Date & Time (Workorder)

This non-standard monitor attempts to find all items placed onto a delivery workorder within a specified date range, but that were not delivery validated by the “required by” date and time. The list created contains workorders that have at least one item that was not delivery validated by the “required by” date and time.

Once this monitor is selected, click **Setup** to further define the query to be executed.



In this dialog box you can specify the account(s) whose workorders are checked for timeliness. If you leave the Account fields blank, the system checks all accounts. You can also choose to have the system look through all subaccounts, or just Level 1 accounts.

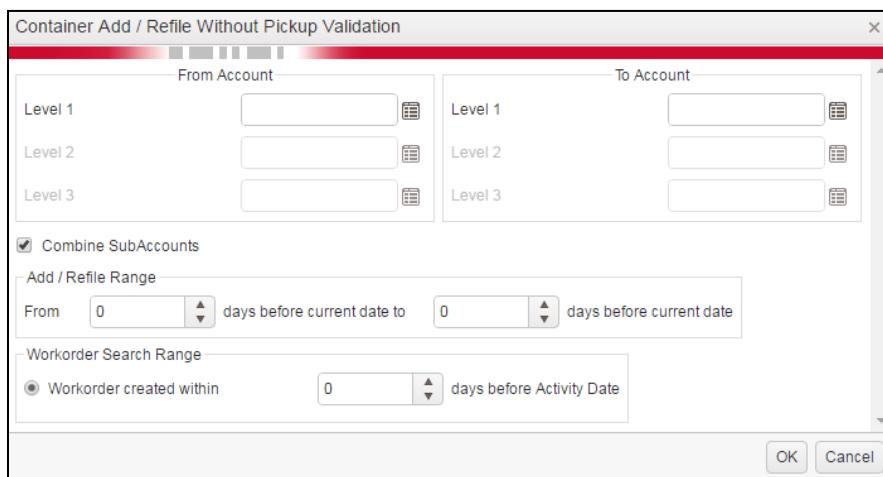
In the Required by Date and Time fields, you can select the exact period of time that items were supposed to be validated.

Add / Refile Without Pickup Validation (Container, Filefolder, Tape, Item)

This non-standard monitor attempts to find an item added or refiled within a specific time period without a pickup or receive validation scan on the previous workorder on which the item was placed.

The monitor asks for a date range for which items were added or refiled. The monitor also asks for a date range to look for the most recent workorder that the item is on, and determines whether a pickup or receive validation scan has been performed. If no pickup or receive validation scan has been performed, the item qualifies for the Monitor list.

Once this monitor is selected, click **Setup** to further define the query to be executed.



Account: Enter the account you want to search.

Combine SubAccounts: Select this check box if you want to combine SubAccounts for your search.

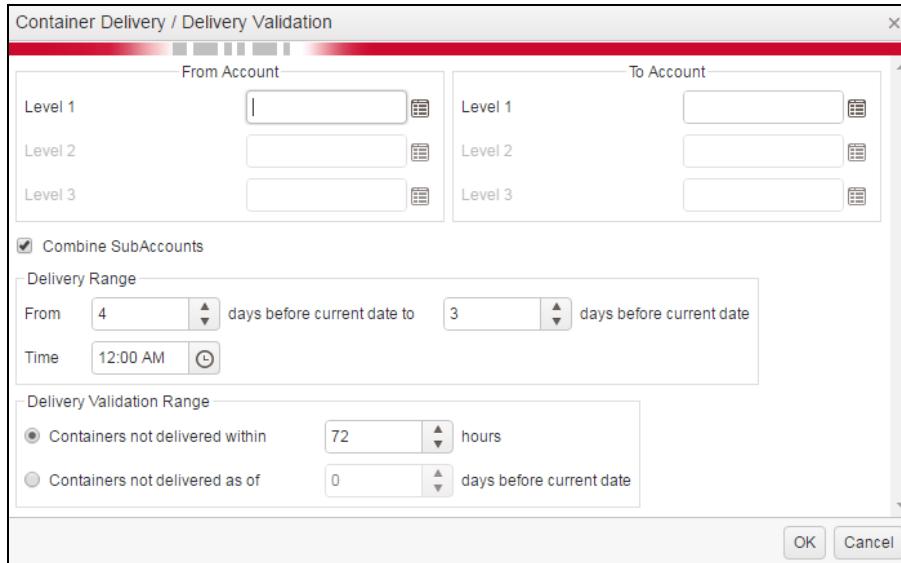
Add / Refile Range: Enter the date range for which items were added or refiled.

Workorder Search Range: Enter the number of days before the item's add/refile date that you want to search for the latest workorder.

Delivery / Delivery Validation (Container, Filefolder, Tape)

This non-standard monitor attempts to find all items of a specified base object type that were placed onto a Delivery workorder within a specified date range, but were not Delivery validated within a specified number of hours of being placed on the workorder, or within a specified number of days prior to today. There are container, filefolder, and tape variations of this monitor. This monitor is very similar to the previous one, but finds the items rather than the workorders.

Once this monitor is selected, click **Setup** to further define the query to be executed.



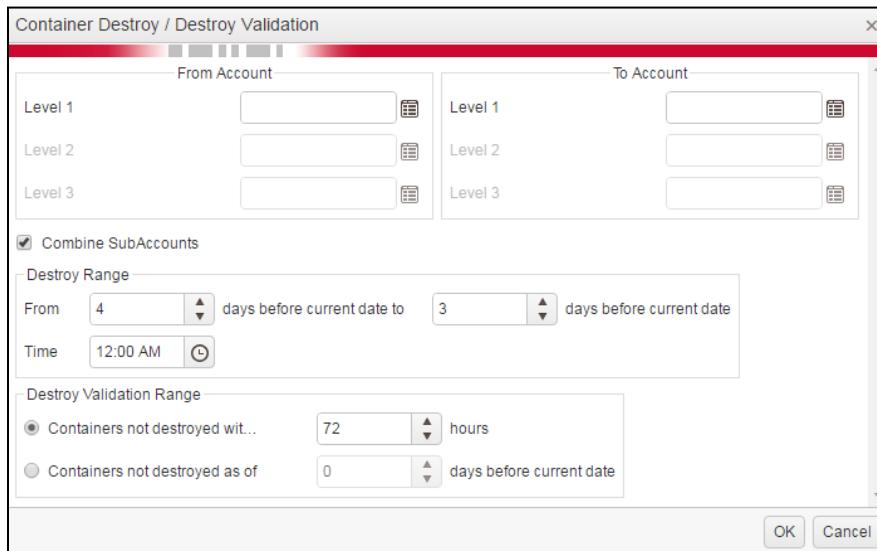
You can select a single account, a range of accounts, or, by leaving the Account field blank, have the system check all accounts. You can also choose to include subaccounts or not.

Determine a date and time range that the items were to be delivered in the Delivery Range fields. In the Delivery Validation Range fields you can specify whether you want to see items that were not delivered within a specified number of hours of their due date/time, or you can find items that have not been delivered at all, within the last number of days.

Destroy / Destroy Validation (Container, Filefolder, Tape)

This non-standard monitor attempts to find all items of a specified base object type that have been placed onto a Destroy workorder within a specified date range, but were not Destroy validated within a specified number of hours of being placed on the workorder, or within a specified number of days prior to today. There are container, filefolder, and tape variations of this monitor.

Once this monitor is selected in the dialog box, click **Setup** to further define the query to be executed.



Select the Account or range of Accounts that you want included in this monitor. If you leave the Account fields blank, the system reports on all accounts. You can also choose to include the Accounts' subaccounts.

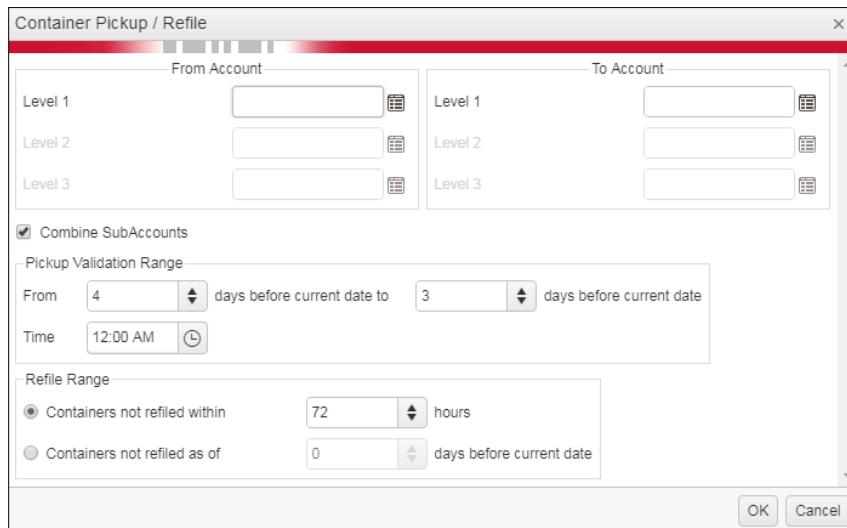
Determine the date range and time that items were supposed to have been destroyed in the Destroy Range fields.

You can choose to find items that were not destroyed within a specified number of hours of their scheduled destruction, or you can choose to find items that were scheduled for destruction, but not destroyed in the last specified number of days.

Pickup / Refile (Container, Filefolder, Tape)

This non-standard monitor attempts to find all items of a specified base object type picked up within a specified date range, but not placed back into a non-holding area location within a specified number of hours of the pickup validation, or within a specified number of days prior to today. This includes Adds and Refiles.

Once this monitor is selected, click **Setup** to further define the query to be executed.



Select the Account or range of Accounts that you want included in this monitor. If you leave the Account fields blank, the system reports on all accounts. You can also choose to include the Accounts' subaccounts.

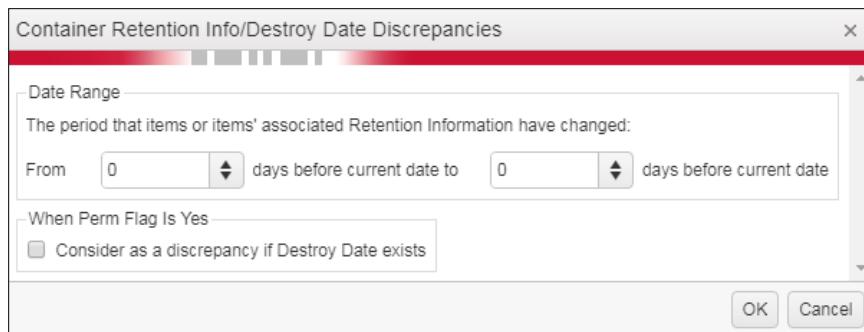
Determine the date range and time that items were picked up in the Pickup Validation Range fields.

In the Refile Range fields, you can determine whether the items you are looking for were not refiled within a specified number of hours after being picked up, or those which have not been refiled in the last specified number of days.

Container Retention Info / Destroy Date Discrepancies (Container, Filefolder, Tape)

This non-standard monitor attempts to find all items of a specified base object type where the item's Update Date/Time or Record Series Retention Information Update Date/Time has changed during the specified time period. These items are then evaluated to see if their Destroy Date is consistent with the Destroy Date calculated from Retention Information.

Once this monitor is selected, click **Setup** to further define the query to be executed.

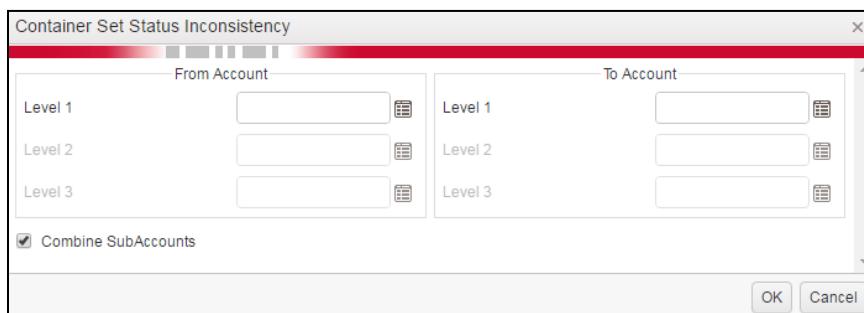


Determine the date range for which the items or their associated Retention Information has changed. You can also choose to consider it a discrepancy if a Destroy Date exists when the Perm Flag is set to Yes.

Set Status Inconsistency (Container, Filefolder, Tape)

This non-standard monitor attempts to find all items of a specified base object type that exist together in the same set, and where not all set members have the same status. Generally, set members should all have the same status, so this monitor helps identify any aberrations.

Once this monitor is selected, click **Setup** to further define the query to be executed.

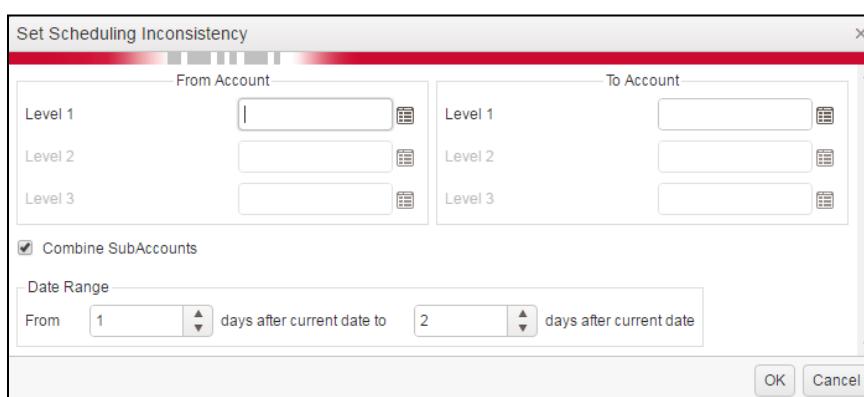


Select the Account or range of Accounts that you want included in this monitor. If you leave the Account fields blank, the system reports on all accounts. You can also choose to include the Accounts' subaccounts.

Set Scheduling Inconsistency (Scheduling)

This non-standard monitor attempts to find all schedules for items that exist together in the same set, and where not all items are on the same schedule, for all schedules within a specified number of days from now. Generally, all set members should be included on any given schedule, so this monitor helps identify any aberrations in scheduling.

Once this monitor is selected, click **Setup** to further define the query to be executed.



Select the Account or range of Accounts that you want included in this monitor. If you leave the Account fields blank, the system reports on all accounts. You can also choose to include the Accounts' subaccounts.

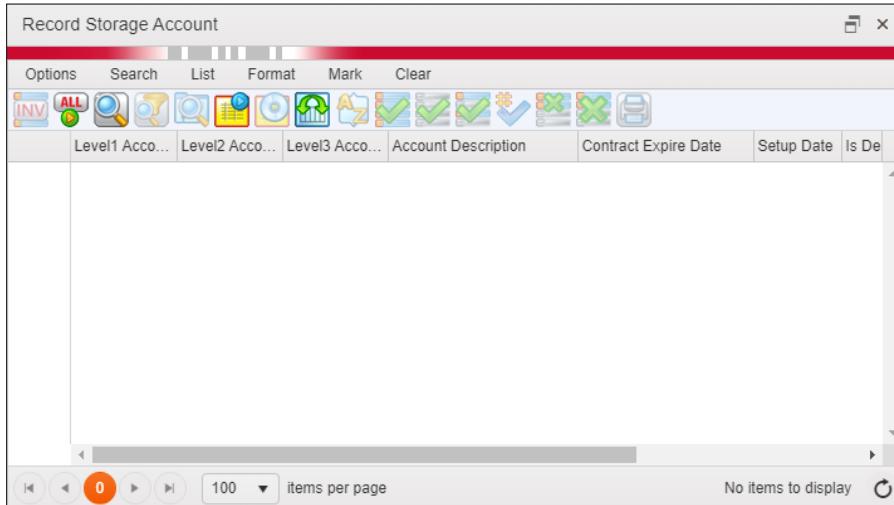
Select a range of dates that you want to check. Anything scheduled during that date range that does not include a complete Set is reported upon with this monitor.

Invoicing

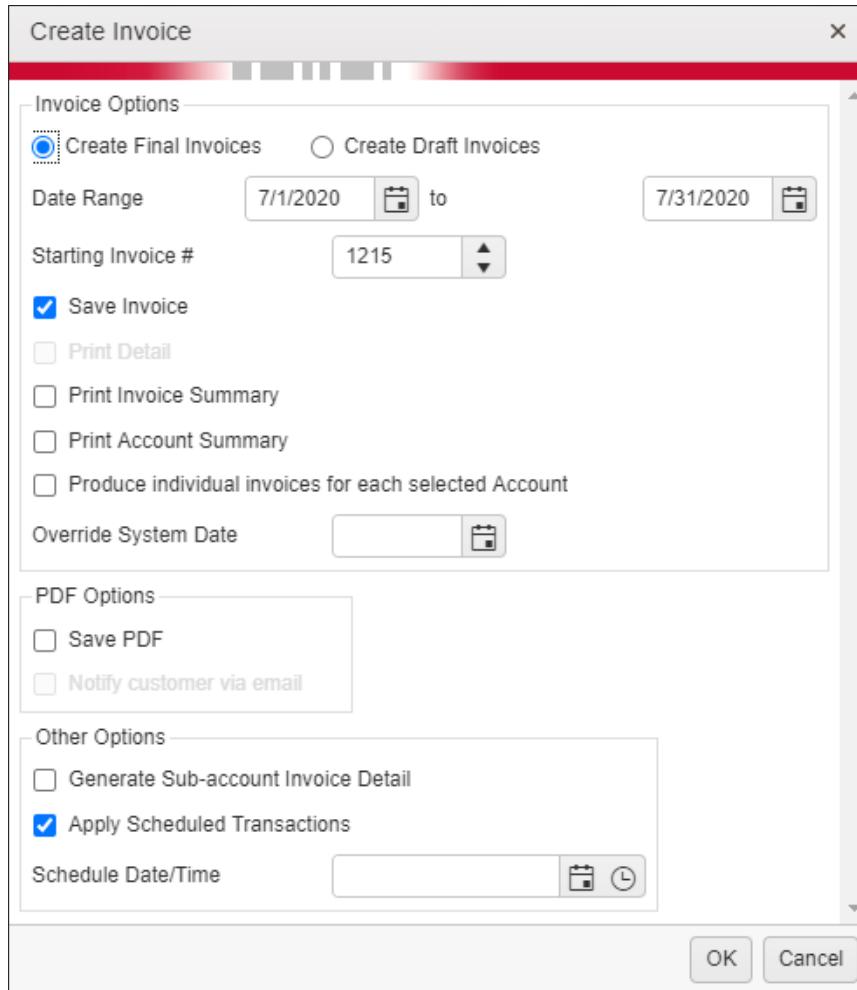
Create Invoices

Invoices are generated using the **Invoice** menu option. Through this menu option, you can create new invoices, or reprint existing invoices.

To create a new invoice, from the **Administration** menu, **Invoice** submenu, select **Create**.



Load all Accounts that you want to invoice. To print an invoice for just one account, right click on the account and select **Invoice**. To invoice multiple accounts on the grid, mark them and from the **Options** menu, select **Invoice**.



NOTE: The system creates invoices for accounts on the grid even if they do not have any activity or charges associated with them. This can be useful for you if you use the invoice numbers as an indication that all accounts have been invoiced. If you prefer not to invoice all accounts, you can change the setting in the RSWIN.INI file to turn off this function. For more information, see the *RSWIN.INI Configuration* section in the *Maintenance* chapter.

Final/Draft Invoices

You can choose to create either Final or Draft invoices. You have the ability to create a Draft invoice prior to creating a Final invoice. This means you can create Draft invoices, verify that the invoices are correct, and then convert them to Final invoices to send to your customers.

NOTE: If both Draft and Final function access records are set to No (which is the default when creating new users), the user is still allowed to create final invoices.

Date Range

The default Date Range is the month before the current month. For example, if today's date is January 10, the dates showing for the Invoice Date Range will be December 1 through December 31. You can change the dates as needed.

Starting Invoice #

The default starting invoice number is the number following the last invoice that was saved. You can change this number, but once an invoice has been saved, the invoice number cannot be used again. To reprint a saved invoice, see *Reprint Invoices* section.

When Draft Invoices is selected, the invoice number changes to a different range for draft invoices. The default is one if no number was previously set up. The number entered here will be used as the first draft number when creating invoices. The next time draft invoices are created, the number here will increment (the same as when normal invoices are created).

If the Draft or Invoice Number specified in the dialog is already used, the program informs you and asks if the next available invoice number should be used. If you're creating more than one invoice, it will automatically find any missing invoice numbers and use them as it creates invoices.

Save Invoices

By default all invoices are saved as they are created. This enables you to reprint invoices as needed. We suggest that you save all invoices. If you are experimenting with different formats, or are otherwise not creating real invoices, you can clear the Save Invoice check box. When an invoice is not saved, the number can be reused.

Print Detail

You may also choose to print invoice details with each invoice. Invoice detail is a separate report that lists the billing information parameters and detailed calculations for the invoice. Below the Account Header the report lists Account and Rate information that is specific to the Invoice.

The billing information that appears on the normal invoice is also visible on the invoice detail unaltered. But following each of these lines is a detailed description of how the displayed values are derived.

Each detail line bracketed by double asterisks (**....**) shows fundamental values taken from the O'Neil Stratus database. The values here have usually been directly entered into Account or Transaction records by the O'Neil Stratus administrator. Following the one or more lines of fundamental information are the calculations that demonstrate how values were determined. These detail lines are enclosed by angle brackets (<<....>>).

The amount of detail that can be reported for a complex invoice can be tremendous, making the overall invoice hard to decipher. So, you would not normally print the invoice detail either for yourself or your client. However, there will be occasions when you need to explain to yourself or your client exactly how a value was derived. The invoice detail shows you explicitly how the calculation was done, eliminating the need for tedious calculations by hand or dubious speculation about the correctness of any value.

Print Invoice Summary

The Invoice Summary is a report that gives you quantity and amount totals for Storage, Selling, Services, Priority Charges, Minimum Charges, Surcharges and Validations. These totals come from all the invoices printed at a time.

Since quantity and totals are summarized across multiple accounts, account transaction descriptions are not used. Only base transaction descriptions are used. If there is no base transaction for the summary line, then the action description along with the object description is used.

NOTE: On the Invoice Summary the minimum charge entry differs from what the printed invoice shows. The minimum charge on the invoice shows the *full minimum amount*, while the summary shows the *difference* between the actual invoice charge and the minimum invoice charge.

You can print this summary from a couple of different areas of the Invoicing function. When generating and printing invoices for the first time, you can select this check box in the **Create Invoice** dialog box. When

reprinting invoices, there is a check box in the **Reprint Invoice** dialog box as well, or from the **Invoice** grid, **Options** menu, you can choose **Invoice Summary**.

Print Account Summary

(Global Invoice only) Select this option to generate a separate summary page for each Level 1 account that is being invoiced. This report rolls all subaccounts into the Level 1 summary information. It includes Quantity and Amount totals of Storage, Selling, Services, Priority Charges, Minimum Charges, Surcharges and Validations for all Level 2 and 3 accounts under the Level 1 account.

Selecting this option may change the order in which the invoices are printed. Rather than the typical top to bottom order as listed in the grid, the printed invoices along with the summary print in Account order. Within Account, they are printed in invoice number order. At the end of the invoices for an Account, the summary is printed. This keeps the Account invoice and summary grouped together.

Produce Individual Invoices for Each Selected Account

This option allows you to produce separate invoices for multiple levels of an account, even if the Separate Invoice Flag in the **Account Setup** dialog box for the subaccounts is set to No. However, if the Separate Invoice Flag is set to No, any Account Transactions for the lower level accounts are ignored, and all rate information comes from the Level 1 Account.

NOTE: Because of Quantity Breaks, Minimum Charges, etc., the total of the individual invoices may not equal the total of the combined invoice.

If not selected, invoices print based on the Separate Invoice Flag selection.

NOTE: If the Separate Invoice Flag is not selected, the parent account of a subaccount needs to be on the **Invoice** grid in order for the subaccount to NOT receive a separate invoice.

Override System Date

You can override the system date when printing invoices. To do this, click the date picker and select a date. The date selected here appears on the invoice.

PDF Options

Save PDF: Select this check box to save the invoice PDF. This PDF can be viewed, sent to the customer as an attachment to an email, or downloaded by the customer via RSWeb.NET. This option can only be selected when the Save Invoice check box is selected (the invoice must be saved if you want to save the PDF). When selected, the Print Detail check box is cleared and disabled. Detail cannot be saved as a PDF with an invoice.

Notify customer via email: Select this check box if you want to notify the customer via email that an invoice has been created.

Generate Sub-account Invoice Detail

Select this check box to generate sub-account invoice detail that is used in the Sub-account Invoice Report. Invoices will print as usual; however, sub-account invoice detail information will also be generated. The check box status is remembered based on the user logged in.

Apply Scheduled Transactions

Select this check box to apply scheduled transactions before creating invoices. Scheduled Transactions are checked to see if any exist with an Effective Date of the current day or before (all Scheduled Transactions with an Effective Date of the current day or before will be applied regardless of whether or not they will be used in the current invoicing run).

NOTE: If more than one of the same transaction is scheduled to be applied at this time, they are applied in ascending Effective Date order.

Schedule Date/Time

Invoices can be set up to be generated automatically at a specific date and time in the future. Use the date and time pickers to select when you want invoicing to run. If the field is left blank, invoices will run as soon as possible.

Duplicate Invoice Numbers

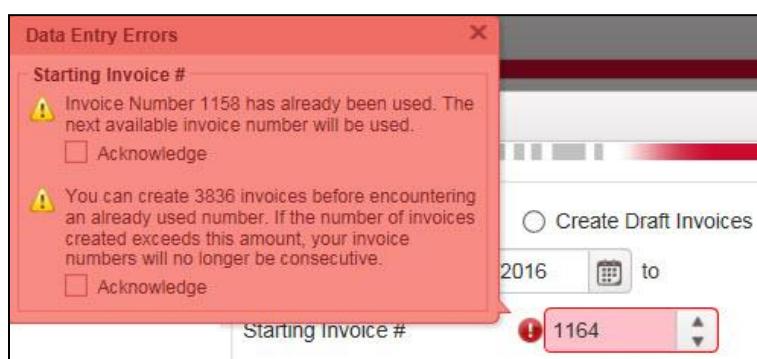
If while creating new invoices or finalizing draft invoices (see *Finalize Invoices* section), a duplicate draft or invoice number is encountered, the next available invoice or draft number will be looked up and used.

For example, assume only the following invoices exist (this example would be the same for draft invoices): 10, 11, 13, 14, 15, and 18.

You are creating 3 new invoices starting at 9. The following invoice numbers will be used: 9, 12, and 16.

You then finalize 3 draft invoices. The following invoice numbers will be used: 17, 19, and 20.

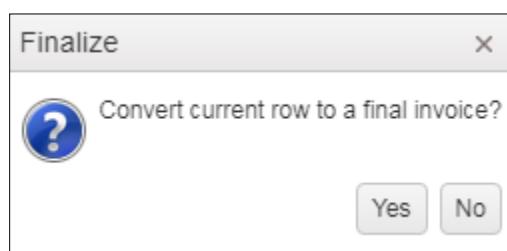
A warning message displays if there are less than 10,000 invoices that can be created without hitting a duplicate.



Finalize Invoices

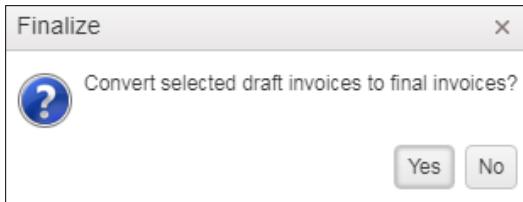
Once Draft invoices are created and reviewed for accuracy, the invoices can be finalized.

From the **Administration** menu, **Invoice** submenu, select **Reprint**. In the **Invoice** grid, load the invoice you want to finalize. Right click on the invoice and select **Finalize**. You receive the following prompt.

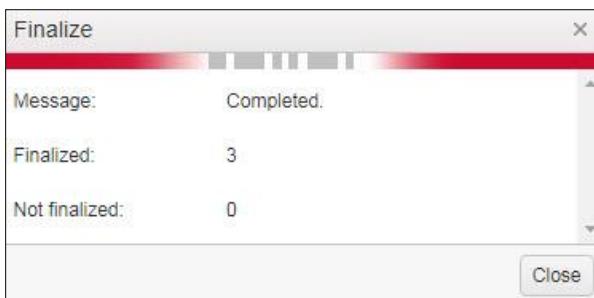


Click **Yes** to convert the draft to a final invoice.

To finalize all marked Draft invoices in the grid, from the **Options** menu, select **Global Finalize**. You receive the following prompt.



Click **Yes** to convert the selected drafts to final invoices. After processing has completed, you are informed of the results.



Any marked invoices that are already final are ignored when processing. If the number of finalized invoices is different from the number processed, the difference is the number of invoices that are already final. An error displays and processing stops if any other error occurs.

The following occurs when a Draft invoice is finalized:

- The Draft field is set to No.
- When you create a draft invoice, a draft number is assigned and the invoice number is set to zero. After converting the draft to a final, the Invoice Number is changed from zero to the next available final invoice number (retrieved from database). The same number is used as if you had gone into the **Create Invoice** option where the default invoice number is displayed.
- Finalize Date/Time is set to the current date/time.
- Any saved PDFs are deleted since a Draft invoice prints out differently than a Final invoice.

Printed Invoices

There are two differences between a Final invoice and a Draft invoice:

- INVOICE is changed to DRAFT.
- Invoice No. is changed to Draft No.

NOTE: Custom invoices must use string translation for this to apply. If the string was hard-coded in the IDF, the text will not be changed to Draft.

Reprint Invoices

When you choose to save invoices (we recommend that you do), they can be accessed again through the Reprint Invoice option.

From the **Administration** menu, **Invoice** submenu, select **Reprint**.

Record Storage Invoice									
Options		Search	List	Format	Mark	Clear			
	Invoice Number	Account Code	Print Date	Print Time	Begin Date	End Date	Total		
1	4	1000	7/12/2001	10:48 AM	6/1/2001	6/30/2001	22.80		
2	6	1000	9/26/2001	1:32 PM	8/1/2001	8/31/2001	5.10		
3	10	1000	9/26/2001	1:40 PM	8/1/2001	8/31/2001	5.10		
4	14	1000	9/26/2001	1:43 PM	8/1/2001	8/31/2001	5.10		
5	32	1000	9/28/2001	4:20 PM	8/1/2001	8/31/2001	5.10		
6	73	1000	11/26/2002	2:28 PM	10/1/2002	10/31/2002	75.03		
7	74	1000	11/26/2002	2:29 PM	10/1/2002	10/31/2002	75.03		
8	116	1000	11/10/2005	1:35 PM	10/1/2005	11/11/2005	-382.26		
9	117	1000	11/10/2005	1:43 PM	10/1/2005	10/31/2005	-374.35		
10	118	1000	11/10/2005	2:16 PM	10/1/2005	10/31/2005	-374.35		
11	119	1000	6/3/2008	8:47 AM	3/1/2008	5/31/2008	29.71		
12	120	1000	6/3/2008	8:51 AM	3/1/2008	5/31/2008	29.71		
13	121	1000	8/28/2008	8:44 AM	7/1/2008	7/31/2008	10.79		
14	122	1000	8/28/2008	8:45 AM	7/1/2008	7/31/2008	10.79		

Load all invoices that you want to reprint. To reprint just one invoice, right click on it and select **Reprint**. To reprint invoices for all accounts on the grid, from the **Options** menu, select **Global Reprint**.

Reprint Invoice

Invoice Options
<input type="checkbox"/> Save Invoice
<input type="checkbox"/> Re-tally
<input type="checkbox"/> Re-calculate
<input type="checkbox"/> Print Detail
<input type="checkbox"/> Print Invoice Summary
<input type="checkbox"/> Print Account Summary
Override System Date <input style="width: 100px; height: 20px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;" type="text"/>
PDF Options
<input type="checkbox"/> Save PDF
<input type="checkbox"/> Notify customer via email
Other Options
<input type="checkbox"/> Generate Sub-account Invoice Detail
<input type="checkbox"/> Apply Scheduled Transactions
Schedule Date/Time <input style="width: 100px; height: 20px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;" type="text"/>
OK Cancel

Save Invoice

Select this check box to re-save the invoice. You would want to do this if any new activity has occurred that will affect the invoice.

Re-Tally

You can choose to re-tally an existing invoice. Use this option when new activity has occurred that you want reflected in the customer invoice, or other changes have been made. This causes the system to re-count storage items and services provided. If, once the invoice has been re-tallied, you want to save those changes, select the Save Invoice check box.

Re-Calculate

You can choose to re-calculate the totals on an existing invoice. This can be used to reflect a new rate structure or different billing information choices. If, once the invoice has been re-calculated, you want to save those changes, select the Save Invoice check box.

NOTE: You do not have to re-tally in order to re-calculate. You might want to re-calculate without re-tallying when, for instance, you change a storage or service rate for a customer.

Print Detail

If you want to see the detail information to confirm your numbers, select the Print Detail check box.

Print Invoice Summary

The Invoice Summary is a report that gives you quantity and amount totals for Storage, Selling, Services, Priority Charges, Minimum Charges, Surcharges and Validations. These totals come from all the invoices reprinted at a time.

Since quantity and totals are summarized across multiple accounts, account transaction descriptions are not used. Only base transaction descriptions are used. If there is no base transaction for the summary line, then the action description along with the object description is used.

NOTE: On the Invoice Summary the minimum charge entry differs from what the printed invoice shows. The minimum charge on the invoice shows the *full minimum amount*, while the summary shows the *difference* between the actual invoice charge and the minimum invoice charge.

Print Account Summary

(Global Reprint only) Select this option to generate a separate summary page for each Level 1 account that is being invoiced. This report rolls all subaccounts into the Level 1 summary information. It includes Quantity and Amount totals of Storage, Selling, Services, Priority Charges, Minimum Charges, Surcharges and Validations for all Level 2 and 3 accounts under the Level 1 account.

Selecting this option may change the order in which the invoices are reprinted. Rather than the typical top to bottom order as listed in the grid, the reprinted invoices along with the summary print in Account order. Within Account, they are printed in invoice number order. At the end of the invoices for an Account, the summary is printed. This keeps the Account invoice and summary grouped together.

Override System Date

You can override the system date when reprinting invoices. To do this, click the date picker and select a date. The date selected here appears on the reprinted invoice.

PDF Options

Save PDF: Select this check box to save the invoice PDF during reprint. This PDF can be viewed, sent to the customer as an attachment to an email, or downloaded by the customer via RSWeb.NET. This option can only be selected when the Save Invoice check box is selected (the invoice must be saved if you want to save the PDF). When selected, the Print Detail check box is cleared and disabled. Detail cannot be saved as a PDF with an invoice.

Notify customer via email: Select this check box if you want to notify the customer via email that an invoice has been created.

Generate Sub-account Invoice Detail

If you did not generate sub-account invoice detail information for an invoice and later decide you want to, you can do it from the **Reprint Invoice** dialog. The check box will initially be grayed out. You must first select *Save Invoice*. The check box will then be available for selection.

Apply Scheduled Transactions

When reprinting invoices with Re-calculate selected, Scheduled Transactions are checked to see if any exist with an Effective Date of the current day or before (all Scheduled Transactions with an Effective Date of the current day or before will be applied regardless of whether or not they will be used in the current invoicing reprint). Select this check box to apply the scheduled transactions before reprinting invoices.

NOTE: If more than one of the same transaction is scheduled to be applied at this time, they are applied in ascending Effective Date order.

Schedule Date/Time

This field is used to schedule your invoicing reprint for a future date and time. Use the date and time pickers to select when you want invoicing to run. If the field is left blank, invoices will be reprinted as soon as possible.

Invoice PO Number

The Invoice PO Number column in the **Invoice Reprint** grid displays the last PO number that was used when the invoice was created. The column can be edited, global edited, and queried.

Record Storage Invoice								
	Options	Search	List	Format	Mark	Clear		
	Invoice Number	Account Code	Invoice PO Number	Print Date	Print Time	Begin Date	End Date	Total
1	1180	1000	1456-9834	9/1/2017	9:53 AM	7/1/2017	7/31/2017	131.49
2	1181	1000	1456-9834	9/1/2017	10:07 AM	7/1/2017	7/31/2017	0.00
3	1182	10005000	1456-9834	9/1/2017	9:53 AM	7/1/2017	7/31/2017	30.10
4	1173	1000	1456-9834	9/1/2017	9:29 AM	8/1/2017	8/31/2017	131.49
5	1174	1000	1456-9834	9/1/2017	9:29 AM	8/1/2017	8/31/2017	0.00
6	1175	1000	1456-9834	9/1/2017	9:33 AM	8/1/2017	8/31/2017	131.49
7	1176	1000	1456-9834	9/1/2017	9:33 AM	8/1/2017	8/31/2017	0.00
8	1177	10005000	1456-9834	9/1/2017	9:47 AM	8/1/2017	8/31/2017	30.10
9	1178	1000	1456-9834	9/1/2017	9:32 AM	8/1/2017	8/31/2017	131.49
10	1179	1000	1456-9834	9/1/2017	9:32 AM	8/1/2017	8/31/2017	0.00

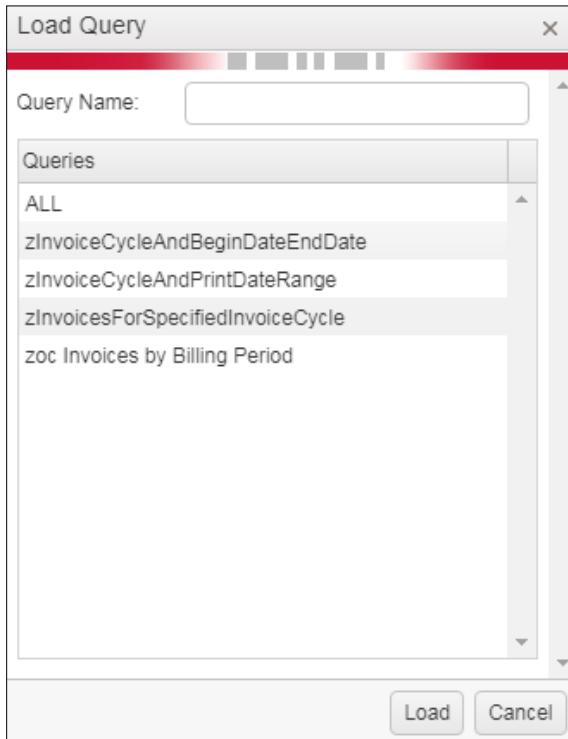
If the invoice is reprinted or reprinted/realigned/recalculated, the PO number shown in this column is used. The PO number saved in the Account record will never be used. Therefore, if you want to reprint the invoice, but you want to change the PO number that was last used on the invoice, you can edit the PO number in the **Invoice Reprint** grid. Invoice PO Number is the only field that can be edited or global edited in this grid.

Invoice Edit X

Invoice PO Number	<input type="text" value="039411"/>
<input type="button" value="Edit"/> <input type="button" value="Cancel"/>	

Predefined Queries

The **Invoice** grid, like some other grids in O'Neil Stratus, is programmed with several predefined queries that you might find useful. These queries are not readily available for you to create on your own, so O'Neil offers them through the use of the **F6** key. When you press the **F6** key from the **Invoice** grid, the following dialog box appears.



There are three predefined queries available in this grid.

zInvoiceCycleAndBeginDateEndDate: Loads all invoices for a specified invoice cycle code and a specified invoice begin and end date.

zInvoiceCycleAndPrintDateRange: Loads all invoices for a specified invoice cycle code and a specified invoice print date range.

zInvoicesForSpecifiedInvoiceCycle: Loads all invoices for a specified invoice cycle code and a specified invoice begin date.

Invoice Settings

A menu option is available in the **Account** grid when creating invoices that allows you to set the margins for all printed invoices, as well as add a custom logo to your Account and Invoice Summary reports.

From the **Administration** menu, **Invoice** submenu, select **Create**. In the **Account** grid, from the **Options** menu, select **Settings**.

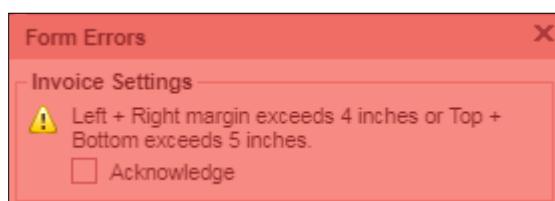


Page Settings

This section lets you set margins and paper size.

Margins: Enter the margins you want to use. The value can be from 0 to 9.99 with up to 2 decimal places.

If the Left + Right margins add up to more than 4 inches or the Top + Bottom margins add up to more than 5 inches, the following warning displays.



Acknowledge the warning. You can then reset your margins, or leave them as is.

Click **OK** to save your selected margins.

Paper Size: Select the default paper size.

Invoice Summary Logo

Complete the fields to add a custom logo file to Account and Invoice Summary reports.

Current Bitmap File: This field displays the name of the current Bitmap file being used. If you no longer wish to include a logo, you can click **Remove Current Bitmap File** to remove it.

Replacement Bitmap File: Click **Select File** to select your logo file. Only the BMP file format is supported. Browse for and select the file you want. At print time if the file is not found, the summary is printed without the logo.

Width/Height Inches: Enter a width and height in inches if you want your image to be scaled. If no values are specified, no scaling is performed and the actual image size is honored.

Logo Alignment: Select where on the page you want the logo to appear.

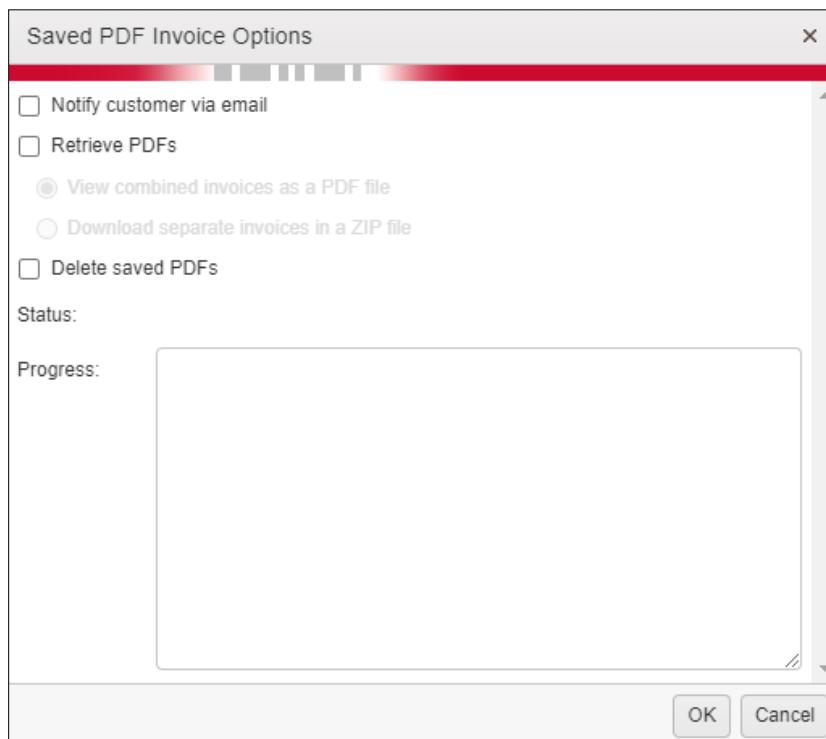
When you have completed all fields, click **OK** to save.

PDF Options

Saved PDF Invoice Options

You can notify customers of saved PDFs, retrieve saved PDFs, and delete saved PDFs from the reprint invoice feature. From the **Administration** menu, **Invoice** submenu, select **Reprint**. In the **Invoice** grid, load the invoices you want and from the **Options** menu select **PDF Options**.

NOTE: Only previously saved PDFs are processed.



Notify customer via email: Select this check box if you want to send email notifications to customers.

Retrieve PDFs: Select this check box to retrieve saved PDFs. You can choose to combine all invoices for marked rows into one PDF, or download separate invoices in a ZIP file. The ZIP file cannot be displayed in the File Viewer. It can only be downloaded.

Delete saved PDFs: Select this check box to delete any saved PDFs for the marked rows. If this check box is selected, the above two options are disabled.

Progress: When you click **OK**, this field displays the progress of the chosen actions. It also informs you of any problems encountered.

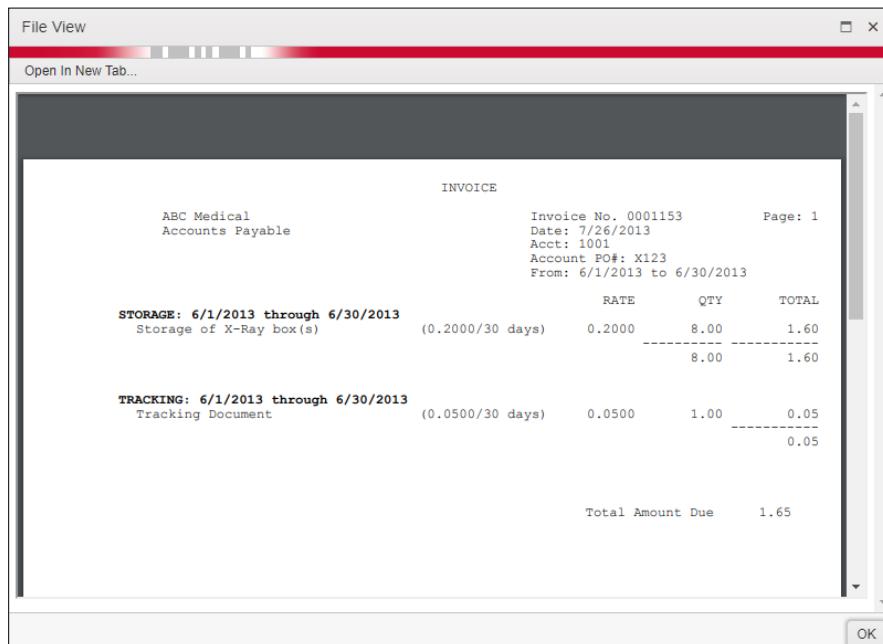
NOTE: An “Email successful” message only confirms that the message was sent successfully. It does not confirm that the recipient actually received the message.

View Saved PDFs

To view a saved PDF, from the **Administration** menu, **Invoice** submenu, select **Reprint**. In the **Invoice** grid, load the invoice you want to view. Right click on it and select **View PDF**.

NOTE: The **View PDF** menu option will be disabled for invoices that do not have a saved PDF.

The File Viewer opens with the invoice displayed.

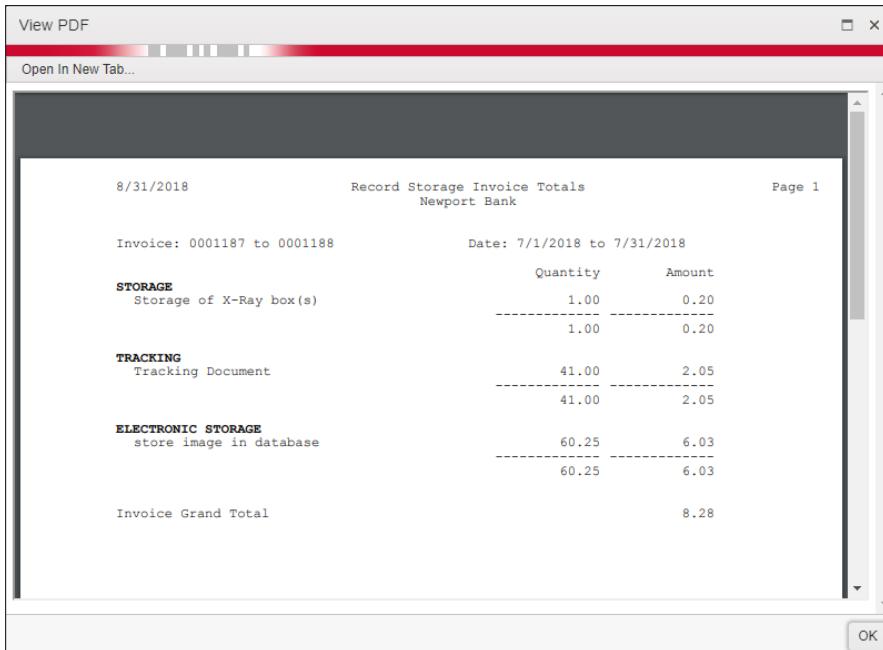


In addition to viewing the invoice, you can download or print it from the viewer.

View Account Summary PDFs

To view a saved Account Summary PDF, from the **Administration** menu, **Invoice** submenu, select **Account Summary PDF**. Load the record you want to view. Right click on it and select **View PDF**.

The File Viewer opens with the account summary displayed.



In addition to viewing the account summary, you can download or print it from the viewer.

Edit Account Summary PDF Information

To edit notification or retrieval information for an Account Summary PDF, right click on it and select **Edit**.

The dialog box has the following fields:

- PDF Notified Date
- PDF Notified Time
- PDF Retrieval User Code
- PDF Retrieval Date
- PDF Retrieval Time
- PDF Retrieve IP Address

At the bottom are "Edit" and "Cancel" buttons.

PDF Notified Date: This is the date the email was sent to the customer notifying them of the PDF.

PDF Notified Time: This is the time the email was sent to the customer notifying them of the PDF.

PDF Retrieval User Code: This is the user who logged in to retrieve the PDF in RSWeb.NET. This field is not populated if you sent the PDF as an attachment rather than a link.

PDF Retrieval Date: This is the date the user logged in and retrieved the PDF in RSWeb.NET. This field is not populated if you sent the PDF as an attachment rather than a link.

PDF Retrieval Time: This is the time the user logged in and retrieved the PDF in RSWeb.NET. This field is not populated if you sent the PDF as an attachment rather than a link.

PDF Retrieve IP Address: This is the IP address that was used to access the PDF in RSWeb.NET. This field is not populated if you sent the PDF as an attachment rather than a link.

When you have finished editing information, click **Edit** to save the changes. Click **Cancel** to return to the grid.

Sub-account Invoice Detail

Sub-account Invoice Report

The Sub-account Invoice Report is designed for use with invoices that combine charges for sub-accounts. The Sub-account Invoice Report breaks down the charges on the invoice to the sub-account level. The report includes a summary, a detailed section for each sub-account, and also shows how charges were calculated/distributed.

In order to populate the report, you first need to generate the sub-account invoice detail. This can be done when creating or reprinting invoices.

This sample invoice shows a combined total for all sub-accounts. Below it is a sample of the report that was run for the invoice.

INVOICE				
John Smith 522 Fourth Street Irvine, CA 92604				Invoice No. 0000224 Page: 1
Date: 5/1/2012 Acct: ABC Account PO#: From: 4/1/2012 to 4/30/2012				
RATE QTY TOTAL				
STORAGE: 5/1/2012 through 5/31/2012				
New Storage: store item store item				
(1.0000/30 days) 1.0000 3.00 3.00				
(1.0000/30 days) 1.0000 7.00 7.00				
<i>(Storage Minimum Charge: 29.00)</i> 10.00 29.00				
store tax @ 10.00% 2.90				
<hr/> 31.90				
SERVICES				
add item delivery item pull container				
WO #00000015 4/6/2012 1.0000 3 3.00				
WO #00000015 4/6/2012 1.0000 3 3.00				
<hr/> 9.00				
service tax @ 10.00% 0.90				
<hr/> 9.90				
VALIDATION				
delivery item validation				
WO #00000015 4/6/2012 1.0000 3 3.00				
<hr/> 3.00				
<hr/> <hr/> 44.80				
<i>(Invoice Minimum Charge: 399.00)</i> 354.20				
<hr/> <hr/> 399.00				
invoice tax @ 10.00% 39.90				
<hr/> <hr/> Total Amount Due 438.90				

From the **Administration** menu, **Invoice** submenu, select **Reprint**. Load the invoices you want to create a report for onto the **Invoice** grid and mark them. From the **Options** menu, select **Sub-account Invoice Report**.

The top section of the report is a summary of all charges for each sub-account, and then a summary by section.

Secure Storage
Sub-account Invoice Report

Account: ABC

Invoice No. 224
From 4/1/2012 to 4/30/2012*Sub-account break-down*

Sub-account	Amount
ABC	\$135.88
ABC\WEST	\$303.02

Total	\$438.90

Sub-account break-down by Section

Section	Sub-account	Amount
STORAGE: 5/1/2012 through 5/31/2012		
	ABC	\$9.57
	ABC\WEST	\$22.33

		\$31.90
SERVICES		
	ABC	\$3.30
	ABC\WEST	\$6.60

		\$9.90
VALIDATION		
	ABC	\$1.00
	ABC\WEST	\$2.00

		\$3.00
TAX/SURCHARGE		
	ABC	\$122.01
	ABC\WEST	\$272.09

		\$394.10
	Total	\$438.90

The middle section of the report is a detailed breakdown of all charges for each sub-account.

Secure Storage Sub-account Invoice Report						
Sub-account Allocation		Sub-acct	Invoice	%	Invoice	Sub-acct
Sub-acct	Section	Qty	Qty		Total	Total
ABC						
	STORAGE: 5/1/2012 through 5/31/2012					
	New Storage: store item	1.00	3.00	33.33%	\$3.00	\$1.00
	store item	2.00	7.00	28.57%	\$7.00	\$2.00
				(Before Minimum Adjustment)	\$3.00	
				(After Minimum Adjustment) (see Note 1)		\$8.70
	store tax @ 10.00%				\$0.87	
					\$0.87	
						\$9.57
	SERVICES					
	add item	1.00	3.00	33.33%	\$3.00	\$1.00
					\$1.00	
						\$1.00
	delivery item WO# 00000015	1.00	3.00	33.33%	\$3.00	\$1.00
	pull container WO# 00000015	1.00	3.00	33.33%	\$3.00	\$1.00
					\$2.00	
	service tax @ 10.00%				\$0.30	
					\$0.30	
						\$3.30
	VALIDATION					
	delivery item validation WO# 00000015	1.00	3.00	33.33%	\$3.00	\$1.00
					\$1.00	
						\$1.00
	TAX/SURCHARGE					
	minimum before tax (see Note 2)				\$109.66	
						\$109.66
	invoice tax @ 10.00% (see Note 3)				\$12.35	
					\$12.35	
						\$122.01
						Sub-account Total \$135.88
ABC\WEST						
	STORAGE: 5/1/2012 through 5/31/2012					
	New Storage: store item	2.00	3.00	66.67%	\$3.00	\$2.00
	store item	5.00	7.00	71.43%	\$7.00	\$5.00
				(Before Minimum Adjustment)	\$7.00	

The last section of the report explains how charges were calculated/distributed, if applicable.

Note 1: Minimum Storage Charge Calculation			
Sub-account	ABC		
	\$3.00 (Sub-account Storage Total before Minimum Charge)	x 100	= 30.00%
	\$10.00 (Invoice Storage Total before Minimum Charge)		
	\$29.00 (Storage Minimum Charge)	x 30.00%	= \$8.70
Sub-account	ABC\WEST		
	\$7.00 (Sub-account Storage Total before Minimum Charge)	x 100	= 70.00%
	\$10.00 (Invoice Storage Total before Minimum Charge)		
	\$29.00 (Storage Minimum Charge)	x 70.00%	= \$20.30
Note 2: Minimum Invoice before Tax Calculation			
Sub-account	ABC		
	\$399.00 (Invoice Minimum Charge) - \$44.80 (Invoice Total before Tax)		= \$354.20
	\$13.87 (Sub-account Total before Tax)	x 100	= 30.96%
	\$44.80 (Invoice Total before Tax)		
	\$354.20 (Adjusted Invoice Minimum)	x 30.96%	= \$109.66
Sub-account	ABC\WEST		
	\$399.00 (Invoice Minimum Charge) - \$44.80 (Invoice Total before Tax)		= \$354.20
	\$30.93 (Sub-account Total before Tax)	x 100	= 69.04%
	\$44.80 (Invoice Total before Tax)		
	\$354.20 (Adjusted Invoice Minimum)	x 69.04%	= \$244.54
Note 3: Invoice Tax Calculation			
Sub-account	ABC		
	\$123.53 (Taxable Sub-account Total) x 10.00% (Tax Rate)		= \$12.35
Sub-account	ABC\WEST		
	\$275.47 (Taxable Sub-account Total) x 10.00% (Tax Rate)		= \$27.55

Distributing Charges among Sub-accounts

For each charge that appears on an invoice, except for minimums and taxes, the invoice will keep track of the adjusted quantity (a quantity that has been adjusted by proration and volume, when applicable) from each sub-account. The adjusted quantity from each sub-account is divided by the total adjusted quantity from all sub-accounts to form a percentage. The percentage is then applied to the dollar amount for that charge to produce the dollar amount applied to that sub-account.

After the dollars have been distributed for all charges except minimums and taxes, invoice will proceed to distribute minimums and taxes. Each minimum or tax (except for Invoice Minimum before Tax, Invoice Tax, Invoice Minimum) is distributed to each sub-account based on the percentage of dollar amount of all charges that such minimum or tax is for.

For example, there may be a Service Tax in the SERVICES section, and another Service Tax in the PRIORITY SERVICES section. The first Service Tax will be distributed based on the dollar amount from each sub-account in the SERVICES section, and the second Service Tax will be distributed based on the dollar amount from each sub-account in the PRIORITY SERVICES section.

After all minimums and taxes (except for Invoice Minimum before Tax, Invoice Tax, Invoice Minimum) are computed, Invoice Minimum before Tax, Invoice Tax, Invoice Minimum (in this order) will be distributed based on the percentage of dollar amount that comes from each sub-account.

NOTE: The distribution of minimums and taxes is very similar; however, for taxes, only the amounts that are taxable are considered.

All billing schemes (such as Prorate, Volume, Bill Forward, etc.) are supported in the Sub-Account Invoice Report, with the exception of Highwater Storage.

Minimums/Taxes based on Dollars, not Quantities

Below is an example of how the distribution works for Minimums and Taxes.

Suppose under the SERVICE section:

There's a charge of \$10 to deliver 2 items (1 item from sub-account A, 1 item from sub-account B).

There's a charge of \$20 to pickup 1 item (from sub-account A).

(The total charge is \$30.)

There's a service tax of 10%, or \$3.00

For distribution:

\$5 delivery charge to sub-account A, because:

$\$10 \times (1 \text{ item in sub-account A}) / (2 \text{ items total})$

Similarly, \$5 delivery charge to sub-account B

\$20 pickup charge to sub-account A

\$2.5 tax to sub-account A, because: $\$3 \times (\$25 / \$30) = \2.5

\$0.5 tax to sub-account B, because: $\$3 \times (\$5 / \$30) = \0.5

The distribution of taxes must be based on the dollar amount, not quantities.

Calculation Note

There may be cases where the lines on the report do not appear to add up properly. The calculations being done behind the scenes are correct, but because of the rounding that can occur on the percentages displayed on the report, the figures can appear inaccurate.

An example of this is shown below:

Account	Sub-Acct Qty	Invoice Qty	%	Invoice Total	Sub-Acct Total
1414	87.00	1466.00	5.93	\$410.48	\$24.36

"%" x "Invoice Total" should equal "Sub-Acct Total". However 5.93 is the rounded version of the actual value used in the calculation, "5.93451568894952". Because of this, $5.93 \times \$410.48 = \24.341464 which is \$0.02 off the total shown on the report. The larger the \$ values, the more it could potentially be off.

New Storage Detail Report

The New Storage Detail Report provides a breakdown of invoiced New Storage by Object Code and Add Date.

The Storage section on the invoice does not provide detail of the New Storage.

STORAGE: 2/1/2012 through 3/31/2012	RATE	QTY	TOTAL
New Storage: Container Storage	(1.0000/30 days)	2.0000	7.65
New Storage: Store 04-Box	(2.0000/30 days)	4.0000	13.60
		-----	-----
		11.05	28.90
		Storage Tax @ 10.00%	2.89
		-----	-----
			31.79

The New Storage Detail Report takes that section of the invoice and breaks it down by Object Code and then Add Date.

From the Administration menu, **Invoice** submenu, select **Reprint**. Load the invoice you want to create a report for onto the **Invoice** grid and from the **Options** menu, select **New Storage Detail Report**.

<i>O'Neil University New Storage Detail Report</i>								
Account 6001 VNRecordStorage				Invoice No. 5430 From: 2/1/2012 to 2/29/2012				
Object Code	Add Date	Description	Unit Volume	Qty	Volume Qty	Number of Days	Prorated Qty	Prorated Vol Qty
01_BOX	2/10/2012	1 CUBIC FOOT BOX	1.00	1	1.00	51	0.85	0.85
		SubTotal:					0.85	0.85
02_BOX	2/10/2012	2 CUBIC FOOT BOX	2.00	1	2.00	51	0.85	1.70
		SubTotal:					0.85	1.70
03_BOX	2/10/2012	ARCHIVE BOX	3.00	1	3.00	51	0.85	2.55
		SubTotal:					0.85	2.55
04_BOX	2/10/2012	LEGAL FILE BOX	4.00	1	4.00	51	0.85	3.40
		SubTotal:					0.85	3.40
CONTAINER	2/10/2012	Container	1.00	3	3.00	51	2.55	2.55
		SubTotal:					2.55	2.55
		Total:					5.95	11.05

Edit Accounts

To access the Account Information for any Account, in the **Account** grid, right click on the account and select **Edit**. The **Account Edit** dialog box appears and you are able to edit it to the extent that your function access allows. Any changes made through the **Account** grid are reflected immediately in your invoicing.

Billing Info

From the **Account Edit** dialog box for an Account, you can access and edit the account's billing information by clicking **Billing Info** at the top of the dialog box (see *Account Set Up* chapter for more information on Billing Information). As soon as changes are made, you are able to see them reflected on new invoices or existing invoices that are re-tallied and/or recalculated.

Charge by Day – Notes

If customers are set up to be charged by day rather than by item, (see *Transactions* chapter) there are several invoicing issues to be aware of.

- When the STORAGE transaction is set up to bill by days, the following Billing Info settings are ignored: Highwater (doesn't make sense), Bill Forward (doesn't make sense), Prorate (already built into the quantity), and Adjust (already adjusted by day).
- When the STORAGE transaction is set up to bill by days, the invoice prints out the Qty as the total number of days, instead of the number of items.
- The status for an item is considered to be the status it was at the beginning of the day (i.e. all subsequent status changes on the same day are ignored). When the status of an item changes, the next day is considered its actual first day.
- When an invoice is being printed for an account that has one of the Tally In/Out Days options checked in the Account Billing Information, and the date it was checked was after the beginning invoice date, a dialog box displays warning the user.

Following is an example of storage being charged by day. The 1.0 and 2.0 boxes are charged by day, while Check Box is charged per container.

Rate	Qty	Total
------	-----	-------

STORAGE: 05/01/1997 THROUGH 05/31/1997					
Standard Box	(0.1000 / day)	0.1000	11.00	1.10	
1.0 Cubic Feet	(0.0800 / day)	0.800	100.00	8.00	
1.0 Cubic Feet	(0.0750 / day)	0.0750	100.00	7.50	
1.0 Cubic Feet	(0.0700 / day)	0.0700	100.00	7.00	
1.0 Cubic Feet	(0.0650 / day)	0.0650	227.00	14.76	
2.0 Cubic Feet	(0.1250 / day)	0.1250	310.00	43.75	
Check Box	(22.5000/30 days)	23.2500	1.00	23.25	
			849.00	105.36	

Minimum Invoice Before Tax

When MININVBT is used, minimum invoice amounts are calculated before tax is added rather than after, as is done when using MININVOICE (see *Transactions* chapter). The following examples show what your end result would be using each different method.

Examples

Let's say you have an invoice that totals \$4,750.00. Your Minimum Invoice Charge is \$5,000.

Invoice Minimum Charge (MININVOICE)

Invoice subtotal	\$4,750.00
Tax is 8%	<u>380.00</u>
Invoice total	\$5,130.00

Your minimum charge is \$5,000, so the invoice total meets the minimum. Once you pay out the \$380 in taxes, your take from the customer is \$4,750, so you haven't really collected your minimum of \$5,000.

Invoice Minimum Charge Before Tax (MININBT)

Invoice subtotal	\$4,750.00
Minimum Invoice Charge is \$5,000	<u>250.00</u>
so \$250 is added to bring it up to the minimum	\$5,000.00
Tax is 8%	<u>400.00</u>
Invoice total	<u>\$5,400.00</u>

In this case, you pay out your \$400 in taxes and you still have \$5,000 from the customer.

NOTE: If there is an Invoice Discount, Invoice Minimum Charge Before Taxes is applied after the Invoice Discount.

Definition Files

The Definition File is the file that determines the format of your invoices. The default format is "Standard" but you can change it through the **Billing Information** dialog box for the Account (see *Account Set Up* chapter). O'Neil Stratus comes with several basic formats. If none of these formats matches your customers' needs, other custom formats can be created. Call O'Neil Technical Support for information.

Because invoices are created through file formats, the font and formats have been selected for you. The Standard, RSDOS, RSDOS2, Workorde, and Workord2 formats have also been created with a Font and Style

alternative for use with a laser printer. These fonts and formats make your invoices neater and easier to read. These file names are differentiated with an F at the end. However, depending upon your printer, they may be cumbersome to print. It is recommended that you print sample invoices from each of the Definition files to determine which best suits the needs of your customers and your equipment.

A system-wide RSWIN.INI setting (Defaults.FontSize) is available to set the default font size for printing invoices with the non-"F" format IDF files. The default is 10pt.

Standard

Standard is the default file. It is a simple invoicing format that breaks charges into Action categories of Storage, Services, Priority Services, Materials, Recurring Services and Validation. Within each category, the actions are sorted by the workorder number that is listed, along with the date it was generated. The rates for the actions are listed, and a total for each action is listed in the right column. A subtotal is given for each Action category.

RSDOS

The RSDOS invoice is called that because it is the same format as was used in the Record Storage for DOS program. It is exactly the same as the Standard invoice, except Deliveries and Pickups are broken out separately, instead of being listed under Services.

RSDOSF

This is the RSDOS format, but it prints with a nicer font, to make it neater and easier to read. Be sure that your printer can accommodate the fonts before you use this format for all customers. If your printer cannot read the chosen fonts, it prints them as graphics and the print time increases dramatically.

RSDOS2

This format is the same as the RSDOS format, except that the services section does not split the actions out by workorder—all workorders are combined into one total for each action.

RSDOS2F

Same as RSDOS2, but with laser fonts. Be sure that your printer can accommodate the fonts before you use this format for all customers. If your printer cannot read the chosen fonts, it prints them as graphics and the print time increases dramatically.

Allactiv

This invoice format is similar to the Standard format except that it shows all Activities (storage and services) provided to a customer even if no costs have been associated with it. This format can be useful for showing your customer the work you have done for him for which you have not charged him. You may also want to use this format temporarily for your own review to see what services you have provided for which you are not charging. This format also includes all rate information from the base or account transactions that were used to generate the amounts.

Standardf

The same as standard, but with more attractive font selections. Be sure that your printer can accommodate the fonts before you use this format for all customers. If your printer cannot read the chosen fonts, it prints them as graphics and the print time increases dramatically.

Workorde

Each workorder generated for the customer is listed separately, with all actions and charges associated with the workorder printed under it.

Workordf

This definition file is the same as the Workorde, but with more attractive font selections. Be sure that your printer can accommodate the fonts before you use this format for all customers. If your printer cannot read the chosen fonts, it prints them as graphics and the print time increases dramatically.

Workord2

This is a modification of Workorde. The difference lies in that the Sell transactions are taken out of the Workorder section and placed in a separate section titled Materials.

Workorf2

Same as Workord2, but with laser fonts. Be sure that your printer can accommodate the fonts before you use this format for all customers. If your printer cannot read the chosen fonts, it prints them as graphics and the print time increases dramatically.

Canada

This definition file is a version of Standard that has been modified to support Canada's GST tax calculation.

Canadaf

This definition file is the same as the Canada, but with more attractive font selections. Be sure that your printer can accommodate the fonts before you use this format for all customers. If your printer cannot read the chosen fonts, it prints them as graphics and the print time increases dramatically.

Invoice Detail

As previously described, printing the Invoice Detail can be very helpful in understanding the calculations and rate structures used. Let's use the following example to produce the calculations for various settings in the **Transactions** and **Billing Information** dialog boxes.

Situation

The current date is April 2, 2018. ABC Corp. started sending us containers for storage in January. Their 10 containers were sent to us on the following schedule:

Date	Containers Added
1/15/18	5
2/21/18	2
3/10/18	1
3/20/18	2

Our Storage Rates for ABC Corp are as follows:

Volume Billing	Qty Break	Rate	Flat Rate
No	1-2 Containers	\$1.00	N

No	3-5 Containers	\$0.50	N
No	6+ Containers	\$0.25	N

The unit volume of a container = 2.00

Volume Billing	Qty Break	Rate	Flat Rate
Yes	999999	\$0.15	N

Currently, all options are set at No, as shown below. For each example, we will change just one of the options to Yes.

Prorate	N
Adjust	N
Highwater	N
Volume Billing	N
Accumulate?	N

The storage calculations for the invoices that we could create for ABC, in the month of April, for storage in the month of March, would be as follows:

All No

The total for the invoice is \$2.50. The standard calculation used is:

$$\$0.25 \text{ (monthly rate for 10 containers)} \times 10 \text{ (containers)} \times 1 \text{ (month)} = \$2.50$$

Prorate Month

When Prorate Month is chosen, the customer is only charged for the days of the month that the new containers were in the system. The number of days a container is in the record center is calculated and shown on the invoice in the quantity column as fractional containers.

Example:

ABC had 7 containers in the system the entire month and added one container on the 10th and two more on the 20th. The invoice calculations are as follows:

$$\frac{\text{Days In}}{\text{Invoice-Cycle-Length}} \times \text{Number of containers in the record center for the same number of days} = \text{Quantity}$$

First the containers are converted to fraction of containers based on the amount of days they were in the system. To calculate this fraction we divide the number of days in the record center by the number of days in the invoice cycle (Days In / Invoice Cycle Length):

1 container added on the 10th was in the system for 21 days:

$$\frac{21 \text{ days}}{30 \text{ day invoice cycle}} \times 1 \text{ container in record center for 21 days} = .7 \text{ containers}$$

2 containers added on the 20th were in the system for 11 days:

$$\frac{11 \text{ days}}{30 \text{ day invoice cycle}} \times 2 \text{ containers in record center for 11 days} = .7332 \text{ containers}$$

7 containers were in the system the entire month:

$$\frac{30 \text{ days}}{30 \text{ day invoice cycle}} \times 7 \text{ containers in record center for 30 days} = 7 \text{ containers}$$

Next, we add up the fractions of the containers to get our total containers for the month:

$$0.7 + 0.7332 + 7 = 8.433$$

8.433 is the invoice quantity of containers in the record center for the month.

Your invoice will show the following:

$$8.433 \text{ (containers)} \times .25 \text{ (rate per container per month)} = \$2.11$$

By calculating the prorated amount in this manner it allows us to adjust the container quantity while always keeping the monthly rate per container consistent.

Adjust Charges

When Adjust Charges is chosen, O'Neil Stratus breaks the monthly rates down into charge per day. Therefore, since the month we are charging for is March, which has 31 days, the invoice amount changes accordingly.

10 Containers in the system during the month of March.

Per Day charges are $\$0.25 / 30 = \0.0083

$$10 \text{ (Containers)} \times 31 \text{ (Days)} \times 0.0083 \text{ (\$ per day)} = 2.57$$

Volume Billing

When Volume Billing is chosen, the system attempts to use the volume billing transaction first if it exists. If the volume billing transaction does not exist, the system will then use the standard billing transaction. In our example, since there exists a volume billing transaction (for storing containers), it will be used instead.

$$10 \text{ (containers)} \times 2 \text{ (unit volume per container)} \times \$0.15/\text{month} = \$3.00$$

For more information on volume billing, see the *Volume Billing* section of the *Account Setup* chapter.

Accumulate

The Accumulate option is selected in the **Transactions** dialog box. When rates accumulate, you charge each of the quantity break amounts for the quantities that they apply to. In our example, the system would charge \$1.00 for the first 2 containers, \$0.50 for containers 3, 4 and 5, and \$.25 for the last five containers.

Therefore, the calculations would look something like this:

$$2 \text{ (Containers)} \times \$1.00 = \$2.00$$

$$3 \text{ (Containers)} \times \$0.50 = \$1.50$$

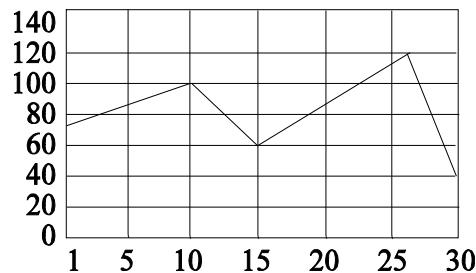
$$5 \text{ (Containers)} \times \$0.25 = \$1.25$$

The total invoice amount for storage would be \$4.75

Highwater Storage

To show calculations for Highwater Storage, we need to change our situation to be a little more sophisticated. Highwater Storage charges the client for the highest quantity of boxes in the record center on any given day of the billing period in question. For our new example, let's say that on March 1, ABC Corp HQ had 100 containers on the system, but only 75 were in the facility. During the month containers were removed and returned, and 50 containers were added to the system. The Account's activities are as shown on the following

graph. The numbers on the left side represent the number of containers in the facility; the numbers along the bottom represent the date.



The month started with 75 containers in the facility. The amount went up to 100 on the 10th and down to 60 by the 15th. When ABC added 50 containers to the system and returned some others, the in-house quantity went up to 120 on the 26th, then down to 40 at the end of the month. Using Highwater Storage, the system would only note the highest quantity, and charge for 120 containers.

$$120 \text{ (Containers)} \times \$0.25 \text{ (Storage Rate for over 6 Containers)} = \$30.00.$$

Remember that you can use almost any combination of these Billing Criteria (some are mutually exclusive, and when one is selected, others become unavailable.

Financial Info Export

Financial Info Export

O'Neil Stratus provides a way for you to export invoice data from O'Neil Stratus to an O'Neil defined export format that can then be manipulated and imported into an Accounting package. This format is available so that a 3rd party, by using the file data and O'Neil's definition of the contents of the file, can write software to interpret O'Neil Stratus' data for importing into an accounting package.

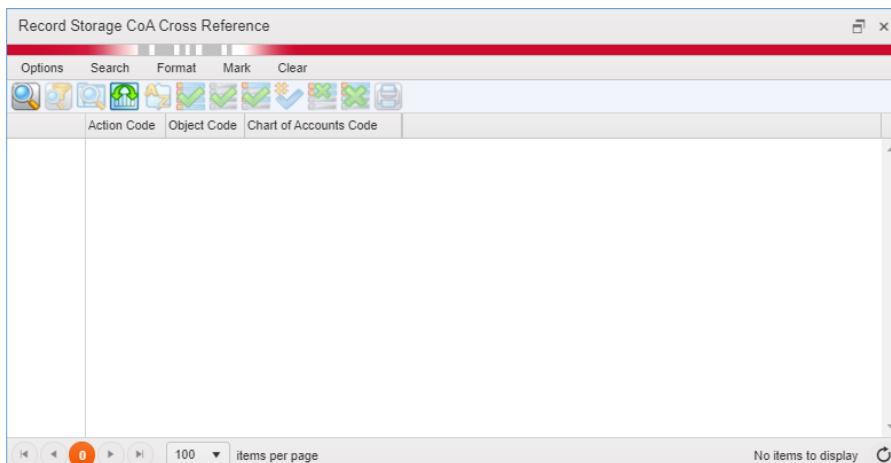
O'Neil Stratus saves information by category, and through the Accounting Export option it can export this information by category to an ASCII file (an O'Neil ASCII export format for financial information). The O'Neil format is as follows: Headers are I (Invoice header information) and D (Detail).

Your accounting package allows you to set up a Chart of Accounts where business transactions are identified and accounted for. Some of these Chart of Account (CoA) Accounts represent invoice transactions which can be imported from O'Neil Stratus. For example, a customer invoice for \$1,000 may be imported into accounting package CoA "Accounts Receivable" Code 1200. An amount of \$1,000 would be debited to CoA code 1200.

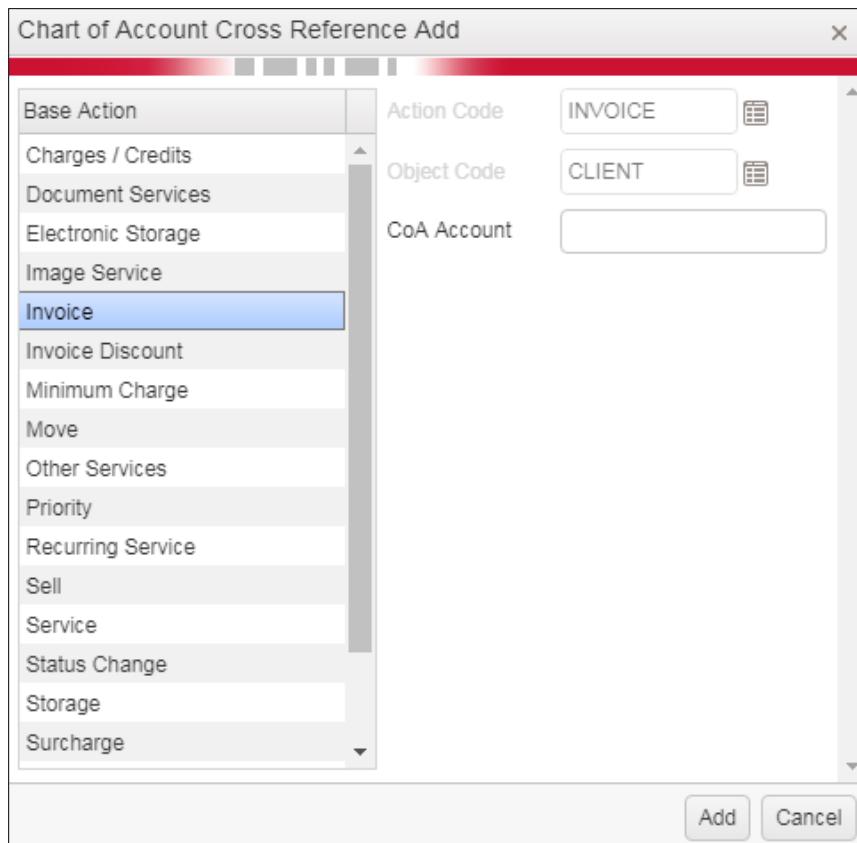
O'Neil Stratus provides an interface that allows you to customize what categories of charges are exported to an accounting package CoA account and to what level of detail or generality is needed. The basis for this is the Action/Object paradigm for setting up Transactions in O'Neil Stratus.

Set up CoA Cross References

To set up which actions and object 'sets' will be applied to which Chart of Account accounts, you establish them in the **CoA Cross Reference** grid. From the **Administration** menu, **Maintenance** submenu, select **CoA Cross Reference**.



Right click anywhere in the grid and select **Add**.



As in the **Transaction** dialog box, when you select a Base Action, O’Neil Stratus either fills in the appropriate Action and Object codes, or offers a grid picker for you to fill in your own Actions and Objects. You may then enter the Account Code appropriate to your Accounting Package.

O’Neil Stratus has, in this instance, defined Invoice, Invoice Discount, and Workorder Charge Override as Actions. This does not occur anywhere else in O’Neil Stratus. This is how your accounting package will recognize them, so O’Neil Stratus places them here. Since there are no options for the Object Code for an Invoice or an Invoice Discount (it will always be Client), the system fills in the Object field for you.

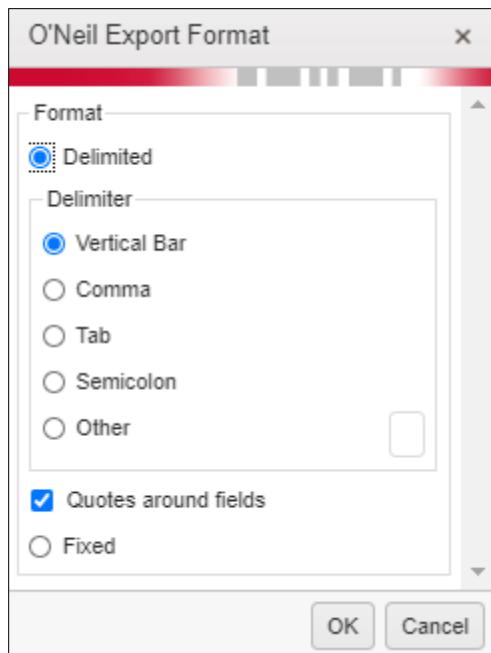
NOTE: Invoice and Invoice Discount are actually sub-actions of the Action “System.” You can view them through the **Setup, Action** options, and you can change their descriptions, but they are only used in the Accounting Export area of the system.

O’Neil Format

The O’Neil Format is not directly importable into any accounting package, but it contains, in a well-defined format, all the information that is necessary to be manipulated into any accounting package import format.

Create an ASCII File

To create an ASCII file for export, from the **Administration** menu, **Invoice** submenu, select **Reprint**. In the **Invoice** grid, load the invoices that you would like to export to your accounting program. Make sure that they are marked, and from the **Options** menu, select **Accounting Export**, then **O’Neil Format**, or click the **Export O’Neil Format** toolbar button.



You may choose to export in a fixed or delimited format (options are described below). Click **OK** to name and save your ASCII file. The file is given an extension of .exp.

Field Delimiters

You can select to export the O'Neil data into one of three record types in the O'Neil export file:

- Fixed field length
- Character delimited (default delimiter is | but other characters are selectable)
- Character delimited with quotes (same as above except that data is within quotes)

Record Type Field

There are only two record types in the O'Neil export file and each is listed below with the letter that identifies it in the ASCII file:

- Invoice Header - I
- Invoice Detail - D

Invoice Header Record

The Invoice Header record is designated in the first field with the character "I." In general, the format for this record is as follows:

Field Name	Format	Columns
Record Type	1 (I)	1
Invoice Number	11 numeric	2-12
Account Level 1 Code	8 alphanumeric	13-20
Account Level 2 Code	8 alphanumeric	21-28
Account Level 3 Code	8 alphanumeric	29-36

Accounting System Customer Code	15 alphanumeric	37-51
Print Date	10 (Windows Region/Language)	52-61
Print Time	5 (HH:MM)	62-66
Invoice Cycle Begin Date	10 (Windows Region/Language)	67-76
Invoice Cycle End Date	10 (Windows Region/Language)	77-86
Salesman Code	5 alphanumeric	87-91
Purchase Order Number	12 alphanumeric	92-103

Invoice Detail Record

The Invoice Detail Record is designated with the character "D." The format is as follows

Field Name	Format	Columns
Record Type	1 (D)	1
CoA Account Code	15 alphanumeric	2-16
Action Code	11 alphanumeric	17-27
Object Code	10 alphanumeric	28-37
Amount	14 numeric	38-51

The first Detail record references the Action/Object pair of Invoice/Client and the amount is the invoice total (a debit amount in the accounting program). All subsequent detail lines add up to the invoice total (credit amounts in the accounting program). The amount debited in the Invoice Detail equals the amount credited. O'Neil Stratus exports all lowest-level subtotals within an invoice to insure this even if you have failed to properly cross-reference all of the necessary Action/Object pairs with CoA codes. If the CoA code is missing, a placeholder of '----' is substituted for it.

NOTE: Taxes are also defined in a Detail record.

RSWIN.INI Settings

There are two system-wide RSWIN.INI settings that allow you customize the data for export.

O'NeilExport.QuantityInvoiced: When set to Yes, this option includes Invoice Quantity data in the O'Neil Standard Financial Export file at the end of the "D" record type. The default is not to include Invoice Quantity data.

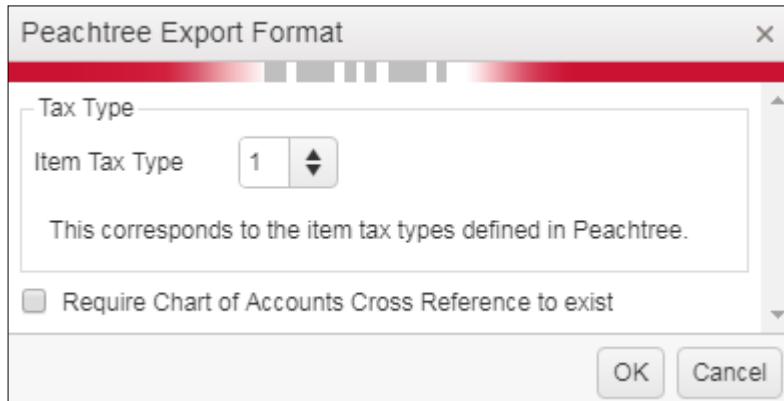
O'NeilExport.TransactionDescription: When set to Yes, this option includes Invoice Transaction Description data in the O'Neil Standard Financial Export file at the end of the "D" record type. The default is not to include Invoice Transaction Description data.

Peachtree Format

O'Neil Stratus works with the Peachtree Accounting package by allowing you to export invoice information from O'Neil Stratus and import it into Peachtree. The invoice information you will be exporting comes from previously generated invoices. Therefore, you must run invoices first. Then you will export the invoice information from the existing invoices into Peachtree format, and save it to a file. From your Peachtree program, you will import the information from the file.

Export O'Neil Stratus Invoice Information into Peachtree Format

From the **Administration** menu, **Invoice** submenu, select **Reprint**. The **Invoice** grid appears. In the **Invoice** grid, load the invoices you want to import into Peachtree. Make sure that they are marked, and from the **Options** menu, select **Accounting Export**, then **Peachtree Format**, or click the **Export Peachtree Format** toolbar button.



Enter the Item Tax Type. This number corresponds to the item tax types defined in Peachtree. Select the check box if you want to require that a CofA Cross Reference exists.

Click **OK** to name and save the Peachtree export file. The file is given an extension of .exp.

Import O'Neil Stratus Invoice Information into Peachtree

In your Peachtree program, select **Import/Export** from the **File** menu. Make sure that **Sales Journal** under **Accounts Receivable** is highlighted.

Click **Import**.

Under **Layout**, select the fields in the following order:

- Customer ID
- Invoice #
- Date
- Accounts Receivable Account
- Number of Distributions
- G/L Account
- Amount
- Tax Type

Under **Options**, select the export file that you created above and click **OK** to begin importing.

Import Fields Mapping

The import fields are mapped accordingly:

Peachtree	O'Neil Stratus
Customer ID	Accounting Customer Code
Invoice #	Invoice Number
Date	Print Date

Accounts Receivable Account	INVOICE-CLIENT Chart of Account Code
Number of Distributions	Total Number of Invoice Detail
G/L Account	Invoice Detail Chart of Account Code
Amount	Invoice Detail Amount
Tax Type*	Item tax entered when exporting invoice data

* Tax Type refers to the item tax type that is associated with an inventory item in Peachtree. The item tax type is used to classify the item as taxable or exempt. Please see Inventory Items under the Maintain menu in Peachtree for more information.

Language Translation

Overview

O'Neil Stratus is designed so that the text used on various screens, menus, messages, and choice lists may be changed by a record center. Usually text is changed to a different language so that O'Neil Stratus may be used by non-English-speaking users. However, text might instead be changed to use different English words that better reflect the needs of a particular record center or its clientele. Throughout this chapter, we refer to this changing of text as "language translation" since this is the more common activity.

This chapter first explains several fundamental concepts, then provides a high-level overview of the translation processes. Then we go into the specific use of the translation tools.

Database Table Text

Some of the text used in O'Neil Stratus is stored in the O'Neil Stratus database itself, rather than in the program. The text stored in the database falls into two general categories, "application database text" and "internal database text."

Application Database Text

These text items are maintained as part of O'Neil Stratus setup or normal O'Neil Stratus use, and can be changed by an administrator in O'Neil Stratus. Examples include Actions such as Storage, Sell, etc., and Content Categories such as Cancelled Checks and Leasing.

Internal Database Text

These text items, although stored in the database, are not maintainable by O'Neil Stratus. Examples include account access descriptions such as None by Default, and item status text such as Destroyed, In, and Out, and even the words Yes and No.

Changing the application database text may be performed as part of normal O'Neil Stratus setup and use, regardless of whether translation is ever performed. The internal database text is maintained and applied using the **Language Translation** feature, and it is only changed if translation is being performed.

Form, Menu, and Message Text

Much of the text used in O'Neil Stratus is stored internally as part of the program itself. This is the text that appears in menus, on dialog boxes, and in many status and error messages throughout O'Neil Stratus. All of this text is stored in a special file that can be translated, saved with a new name, and then used by all workstations at a record center. The Language Translation feature is used to maintain the form, menu, and message text.

Important Points

- The User's Guide is not translated by O'Neil.
- The on-line help is not translated.
- Some text, such as Object, Action, and Transaction Code descriptions, can be edited and therefore "translated", but these translations are not related to a defined O'Neil Stratus language. This means you cannot have, for example, an English, Spanish, and Italian version of the description text.
- Cache is updated every five minutes, so it may take several minutes for newly translated text to be visible.

Language Translation Feature

The Language Translation feature makes it possible to have multi-language RSWeb.NET and O'Neil Order pages as well as multiple languages for O'Neil Stratus users.

Create a New Translation

From the **Administration** menu, **Maintenance** submenu, select **Language**.

Record Storage Language		
	Description	RSWeb.NET/oneilOrder
1	English	Yes
2	German	No
3	Italian	Yes
4	Spanish	Yes

All existing languages are listed. To add a new language, right click anywhere in the grid and select **Add**.

Language Add	
Language to Copy	<input type="text" value="ENGLISH"/>
Description	
<input type="checkbox"/> Show as available language in RSWeb.NET/oneilOrder login page	
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

All new languages must originate from an existing language. Therefore, you must "copy" an existing language to create a new one. (The source language that you copied from will be unaffected.)

Use the grid picker next to the Language to Copy field to select the language you want to copy from. The **Language** choice list appears.

Record Storage Language		
Options Search Format		
	Description	RSWeb.NET/oneilOrder
1	English	Yes
2	German	No
3	Italian	Yes
4	Spanish	Yes

Select the language you want to copy from. For example, if you wanted to create a new translation that was a different dialect of Spanish, you could pick Spanish to copy from, which would probably mean fewer changes when translating. Right click on the language, and select **OK**. You are returned to the **Language Add** dialog box.

Language Add	
Language to Copy	ENGLISH
Description	French
<input type="checkbox"/> Show as available language in RSWeb.NET/oneilOrder login page	
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

Type in the name of the new translation you are going to create (for our example, we are using French). Select the check box if you want this language to be available for RSWeb.NET or O'Neil Order users also. Click **Add**.

The **Language** grid appears with the new language now listed.

Record Storage Language					
Options Search List Format Mark Clear 					
Description			RSWeb.NET/oneilOrder		
1	English		Yes		
2	German		No		
3	Italian		Yes		
4	Spanish		Yes		
5	French		No		

1 100 items per page

To begin the French translation, right click on French and select **Text**.

NOTE: The **Text**, **Mobile**, **WebNET**, **O'Neil Mobile** and **O'Neil Order** menu options work the same way. To help keep your RSWeb.NET or O'Neil Order system secure on the internet, it is important that it only be translated by a trusted person.

In the **Translation** grid, query for the text you want to translate. Below are some examples of queries you might find useful.

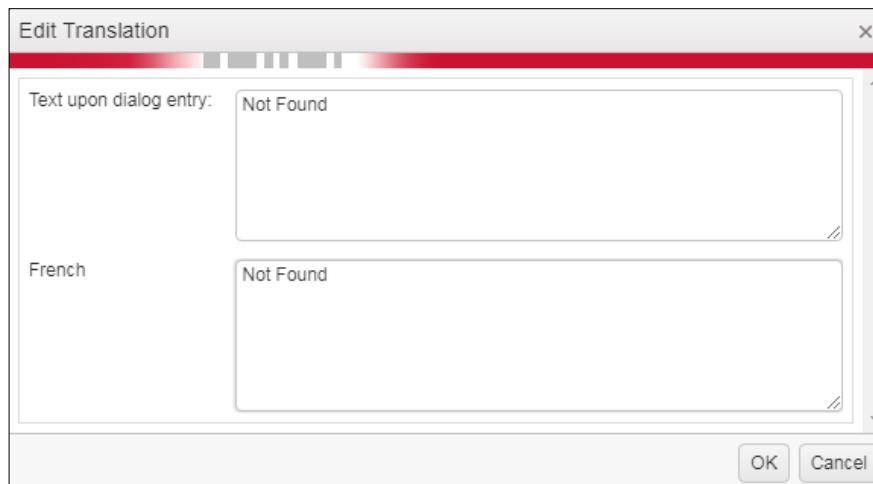
Translation^English = "account" – This type of query would be useful if you know a certain English word or phrase that you want to translate.

Translation^IsTranslated = "no" – This query would be useful to identify those phrases that still need to be translated.

Once you have defined your query and the data has been loaded, the **Translation** grid will appear as shown below.

Record Storage Translation for French Text					
Options Search List Format Mark Clear 					
	English	Translation	IsTranslated	UpdateUs...	Update Date
1	Alert.Alert	Alert.Alert	No	ADMIN	10/20/2015 9:47
2	Alert.Notification	Alert.Notification	No	ADMIN	6/21/2018 5:48 A
3	Alert Form	Alert Form	No	ADMIN	10/20/2015 9:47
4	Alert Form	Alert Form	No	ADMIN	10/20/2015 9:47
5	Alert Form	Alert Form	No	ADMIN	10/20/2015 9:47
6	Dashboard.Grid	Dashboard.Grid	No	ADMIN	11/14/2016 10:51
7	Dashboard.Chart	Dashboard.Chart	No	ADMIN	10/20/2015 9:43
8	Dashboard.FavoriteSearches	Dashboard.FavoriteSearches	No	ADMIN	10/20/2015 9:43
9	Dashboard Group	Dashboard Group	No	ADMIN	11/14/2016 10:51
10	Dashboard Control	Dashboard Control	No	ADMIN	11/14/2016 10:51
11	first	first	No	ADMIN	3/1/2016 1:39 P
12	second	second	No	ADMIN	3/1/2016 1:39 P
13	fifth	fifth	No	ADMIN	3/1/2016 1:39 P

The original English text appears in the left column and the translated text appears in the right column. In the above example we haven't started translating yet, so both columns appear the same. To begin translating, right click on a row and select **Edit**.



The existing text appears in the top section of the dialog box. In this case, it is English, since that is what we chose to copy from. The bottom section indicates the language you are translating to and provides space for you to type in the translation. The original text appears in the bottom section until you type in your translation.



Once you have typed in the translation, click **OK** to return to the **Translation** grid.

Record Storage Translation for French Text					
	English	Translation	IsTranslated	UpdateUs...	Update Da...
180	Return Date	Date de retour	Yes	ADMIN	8/10/2018
181	Not Found	Pas trouvé	Yes	ADMIN	8/10/2018
182	Reassigned	Reassigned	No	ADMIN	9/25/2001
183	Content Val	Content Val	No	ADMIN	9/25/2001
184	Added to Refile List	Added to Refile List	No	ADMIN	7/16/2003
185	Restore Validated	Restore Validated	No	ADMIN	10/9/2003
186	Confirmed	Confirmed	No	ADMIN	5/10/2005
187	Added to Workorder	Added to Workorder	No	ADMIN	5/10/2005
188	Substituted	Substituted	No	ADMIN	9/11/2006
189	Operations Manager	Operations Manager	No	ADMIN	1/26/2016

As you can see in the grid above, the Translation column now displays the translated text. The column next to it, Is Translated, also indicates that the translation has been completed for that item.

Continue this process for all items that need to be translated.

Queries

Translation may cause saved queries and quick queries to stop working. This will happen if text saved in the query has been translated. For example, if you have a quick query that uses "Container^Code =" and you translate the word "Container" to "Box" or "Contenitore", any quick queries previously created using "Container" will no longer work. You will need to create a new quick query using the word "Box" or "Contenitore".

If you are using more than one language, you will need to create the same saved query/quick query for each language. After a translation, you may want to recheck all your queries to make sure they still work.

Database Upgrades

Future database upgrades will often include new text entries, and on rare occasions may include changes to the original English text. Text that has been translated or that has been changed in any way from the default English will never be changed during a database upgrade, so you can be assured that your translation efforts will never be overwritten.

During database upgrade, if a text entry is new, it will be added to the built-in (default) English language, and will also be added to each user-defined language in the O'Neil Stratus database. The IsTranslated column for each user-defined language will be set to No. The translator can choose to translate or not translate the new entry.

During database upgrade, on those rare occasions when the existing original English text is updated, the corresponding text in user-defined languages is updated only if it has never been changed from the original English. This rule ensures that changes that you make during translation will never be overwritten, and it also ensures that if no changes had been made to the text, it will be updated to reflect the change to the original English. In all cases, the IsTranslated column will be set to No. Setting IsTranslated to No when English text is updated makes it easier for a translator to review and possibly modify the translated text to reflect the changes in the English wording. After a database upgrade, you might want to review and possibly translate new and updated text items for each user-defined language.

Rename a Translation

To rename a translation, from the **Administration** menu, **Maintenance** submenu, select **Language**. In the **Language** grid, right click the name you want to change and select **Edit**. The **Language Edit** dialog box appears with the current name displayed in the Description field.



Type the new name, and click **Edit**. The **Language** grid appears with the new name displayed.

Set Up Users

Individual User

To change a language for a user, from the **Administration** menu, **User** submenu, select **Users**. In the **User** grid, load the user you want to change. Right click on the user and select **Edit**.

The User EDIT dialog box displays various user settings. In the top right corner, there is a grid picker icon next to the Language field. The Language field currently shows "English".

User Code	CATHIE	Language	English
New Password		RSMobile Password	
Confirm New Password		User Type	Standard
<input type="checkbox"/> Require Password Change		User Status	Active
		Account Access	All by default

Click the grid picker next to the Language field. The **Language** dialog box appears listing all languages currently available.

The Record Storage Language dialog box contains a table of languages:

	Description	RSWeb.NET/O'Neil Order
1	English	Yes
2	French	No
3	German	No
4	Italian	Yes
5	Spanish	Yes

Right click on the language you want to assign the user, and select **OK**. The language is immediately changed for that user.

NOTE: Different languages can be assigned for different users.

All Users

The language option can also be set using Global Edit. To do this, in the **User** grid select all users you wish to change. From the **Options** menu, select **Global Edit**.

User Global Edit

<input type="checkbox"/> User Type	Standard	<input type="checkbox"/> Next Notification Date
<input type="checkbox"/> User Status	Active	<input type="checkbox"/> Next Notification Time
<input type="checkbox"/> Account Access	None by default	<input type="checkbox"/> Notify Also User
<input type="checkbox"/> Item Security Code		<input type="checkbox"/> Account Model Us
<input type="checkbox"/> Language Description	English	<input type="checkbox"/> Function Model Us
<input type="checkbox"/> Last Password Change Date		<input type="checkbox"/> Web Model User C
<input type="checkbox"/> Last Password Change Time		<input type="checkbox"/> Material Model Us
<input type="checkbox"/> Last Invalid Password Date		<input type="checkbox"/> RSWeb.NET Mater

Click the grid picker next to the Language Description field. Right click on the language you want to assign to all selected users, and select **OK**. Click **Global Edit** to make the change.

Import Format

This table is Edit only; therefore, no new strings can be inserted into the table.

Translation (Edit only)

Field Name	Format	Required For	Columns
Record Type	2 (TT)	Edit	1-2
BaseTableName	32 alphanumeric	Edit	3-34
BaseTableTextID	9 numeric	Edit	35-43
Language Description	32 alphanumeric	Edit	44-75
Translation	6000 alphanumeric	Edit	76-6075

NOTE: The Language Description must have been previously inserted into the **Language** grid. Otherwise, each Translation text import attempt that references the non-existent language will generate an exception.

Event Interest Notification

Overview

This feature allows users with an interest in certain events to be notified when those events occur. Events include such things as workorder status changes, Web order conversions, and more. A variety of interest types are also supported.

Various events have already been set up in the database. You then set up your users so that they are allowed to receive notifications. Next, the specific type of interest those users have in an event needs to be defined. The Event Interest Service is then used to send the actual notifications. Notifications can be grouped together, or sent out individually.

For example, an RSWeb.NET/O'Neil Mobile user may want to receive an email confirmation each time they submit a web order and another email when the order has been fulfilled. In addition, their supervisor may also want to be notified of all orders that user submits. Or a manager in the record center may want to receive notification each time an invoice is created for a certain account.

Several terms are introduced with this feature and are defined below. In addition, there are several steps that are necessary before you begin using the feature. They are all described in the following sections.

Terminology

Recipient

A recipient is a person that has interest in receiving notifications of certain events, such as Web order and workorder status changes. All recipients must be valid, active, O'Neil Stratus users. It follows that a recipient should also have a valid email address or some other delivery moniker that is appropriate for the type of delivery desired.

Event

This includes actions that take place in O'Neil Stratus, such as an update or delete, that someone may have an interest in. A limited number of events have been defined. The focus for defined events is on Web order and workorder updates, as well as Monitors.

Interest

Interest is an association of some kind between a user and an event. That association is used to prepare the event facts into a notification to be delivered to that user. There can be different types of interest in a single event by different users. A user who submits a Web order has one interest, while his supervisor could have a different interest.

Notification

A notification can be thought of as any translatable text message, URL, or file attachment that contains event facts, results, or deliverables. The notification is content, to be delivered to an interested user. Notifications are often consolidated into a single delivery at periodic intervals as a means to manage delivery traffic.

Principal

Different types of Interests are distinguished/named by Principal. Using the web order example, one Principal would be the Web Order Submittal User, while another would be the CSR, and yet another a Web Order Auditor.

Delivery

A delivery can be thought of as one or more notifications combined, and passed to a delivery subsystem. Email is the delivery mechanism used. All undelivered notifications for a single recipient are combined into a single email and passed to the server for ultimate delivery. Frequency of delivery is configurable on a per-recipient basis.

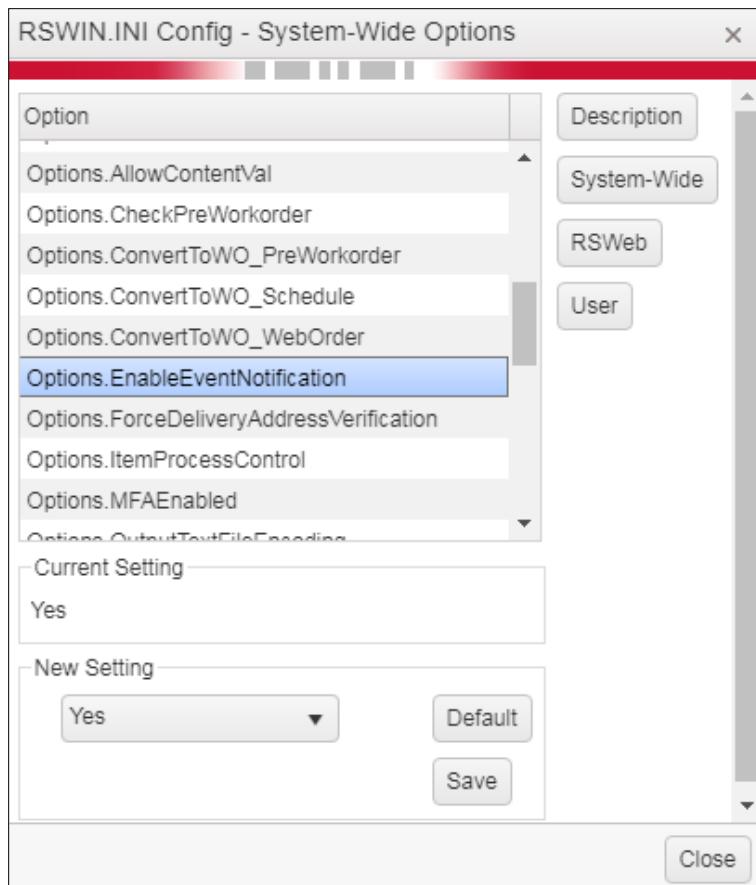
Event Interest Notification Setup Overview

Below are the steps necessary to use the Event Interest Notification feature. Each step is explained in further detail later in this chapter.

1. Enable the RSWIN.INI setting: Options.EnableEventNotification.
 2. Enable notification for all O'Neil Stratus, O'Neil Order and RSWeb.NET users you want to receive notifications. Ensure that a valid email address is entered for each.
 3. Configure Event Interests.
-

RSPIN.INI Setting

A system-wide RSPIN.INI setting, Options.EnableEventNotification, is available for turning the Notification feature on and off.



By default, the feature is turned off. When set to No, menu options, grids, and dialogs are still available; however, events will not be logged and notifications will not be sent.

Notification Addresses (User Add/Edit)

The **User Add/Edit** dialog contains a Notification Addresses section that applies to the Event Notification feature.

The screenshot shows the 'User EDIT' window with various settings. The 'Notification Addresses' section is highlighted with a red box. It contains fields for Email (ewilliams@xyz.com), Next Notification (set to 8/20/2018 10:00 AM), Notify Also User (empty), and checkboxes for Allow Notification (checked) and Prefer HTML EMail (unchecked). A dropdown menu for Notify Minimum Interval is set to 5.

Email: Enter an email address to be used for notifications. If no email is entered, no notification will be generated.

Next Notification: This field automatically increments the date and time of the next notification based on the number in the Notify Minimum Intervals field. This field won't usually be edited, unless you want to override the value for some reason. This date/time is ignored when an Interest is marked as Urgent.

Notify Also User: You can select another user to also be notified each time this user receives a notification. You may want to notify a web user's supervisor each time the web user is notified that an order was submitted. Or you may want to designate another user to also be notified as a back up in case the first user is unavailable.

Allow Notification: Select this check box to allow the user to receive notifications. When this check box is cleared, it is similar to making the user inactive, but only in regards to notifications. If you have several users that you no longer want to receive notifications, you can quickly and easily global edit this field and stop the notifications, rather than having to edit each event interest.

Prefer HTML Email: Select this check box if you prefer emails are sent using HTML format. HTML formatting is generally easier to read and allows for better looking formatting. Text, however, is identical to non-HTML format.

Notify Minimum Intervals: Select the minimum number of minutes between notifications. Notifications will be delivered at most once per this interval. Notifications during this interval are consolidated into one single delivery. (This does not apply when an Interest is marked as Urgent.)

Event Interest

The **Event Interest** menu option is used to set up event notifications, identify who should be notified when events occur, and determine how they should be notified.

From the **Administration** menu, **Notification** submenu, select **Event Interest**.

Record Storage Event Interest User					
	Event Interest User Code	Last Name	First Name	Event Interest User Type	Event Interest User Status
1	BEN	Adams	Ben	Standard	Active
2	CAROL	Morris	Carol	Web User	Active
3	CATHY	Welch	Cathy	Standard	Active
4	CURTIS	Klein	Curtis	Standard	Active
5	ERICA	Williams	Erica	Standard	Active

Load the users you want to set up notifications for. Right click on a user, and select **Edit Interest**.

Record Storage Event Interest - BEN				
	Event Type	Notification Format	Event Principal Description	Urgent Flag
1	Web Order Submitted	Detailed	Web Order Submitted Auditor	Yes
2	Monitor Completed	Detailed XML	Monitor Auditor	Yes
3	Monitor Completed	Default	Monitor Interest	No
4	Web Order In Cart	Default	Web Order In Cart Auditor	Yes
5	Receipt Created	Default	Receipt Creation Auditor	Yes

Any existing event interests are listed in the grid. To add a new event interest, right click anywhere in the grid, and select **Add**.

NOTE: When creating an Event Interest Notification for a user, make sure an email has been entered in their user record. If no email is entered, no notification will be generated.

Event Interest Add/Edit

Define Event Interest for this user. Each Event Type allows different choices for Principal and Notification Format, so first select an Event Type. Depending on the Event Principal chosen, additional Interest Options may be required.

Interest	Interest Options (No options required for the Principal.)
Event Interest User	BEN
Event Type	<input type="button" value="▼"/>
Event Principal	<input type="text"/>
Notification Format	<input type="button" value="▼"/>
<input type="checkbox"/> Urgent Flag	

Event Interest User: This field is automatically populated with the user selected in the **Event Interest User** grid.

Event Type: Click the drop down arrow to select the type of event for this notification.

Event Principal: Click the grid picker to select from the available event principals. The options in this field vary depending on the Event Type selected.

Event Type	Description/Event Principal Type	Notifications Received
Web Order Submitted	Web Order Submittal User (Default Recipient)	Will only receive notification of web orders they submit.
	Web Order Submitted Auditor (Universal Interest)	Will receive notification of all web orders submitted.
	Web Order Submitted Account Auditor (Registered Interest)	Will only receive notification of web orders submitted for a specified account.
	Web Order Submitted Account List Auditor (Registered List Interest)	Will only receive notification of web orders submitted for an account on a specified list.
	Web Order Approver (Supervisory Interest)	Will receive notification when web orders are submitted by any user for which they approve/reject orders.
Web Order Converted to Workorder	Web Order Submittal User (Default Recipient)	Will only receive notification when orders they submitted are converted to a workorder.
	CSR (Default Executor)	Will only receive notification when they are the one who converted the web order to a workorder.
	Web Order Converted to Workorder Auditor (Universal Interest)	Will receive notification when any web order is converted to a workorder.
	Web Order Converted to Workorder Account Auditor (Registered Interest)	Will only receive notification of web orders converted to workorders for a specified account.
	Web Order Converted to Workorder Account List Auditor (Registered List Interest)	Will only receive notification of web orders converted to workorders for an account on a specified list.
Web Order Fulfilled	Web Order Submittal User (Default Recipient)	Will only receive notification when orders they submitted are fulfilled.
	CSR (Default Executor)	Will only receive notification when they are the one who fulfilled the web order.
	Web Order Fulfilled Auditor (Universal Interest)	Will receive notification when any web order is fulfilled.
	Web Order Fulfilled Account Auditor (Registered Interest)	Will only receive notification of web orders fulfilled for a specified account.

	Web Order Fulfilled Account List Auditor (Registered List Interest)	Will only receive notification of web orders fulfilled for an account on a specified list.
	Web Order Approver (Supervisory Interest)	Will receive notification when web orders are fulfilled for any user for which they approve/reject orders.
Web Order Scheduled	Web Order Submittal User (Default Recipient)	Will only receive notification when orders they submitted are scheduled.
	CSR (Default Executor)	Will only receive notification when they are the one who scheduled the web order.
	Web Order Scheduled Auditor (Universal Interest)	Will receive notification when any web order is scheduled.
	Web Order Scheduled Account Auditor (Registered Interest)	Will only receive notification of web orders scheduled for a specified account.
	Web Order Scheduled Account List Auditor (Registered List Interest)	Will only receive notification of web orders scheduled for an account on a specified list.
	Web Order Approver (Supervisory Interest)	Will receive notification when web orders are scheduled for any user for which they approve/reject orders.
Web Order on Hold	Web Order Submittal User (Default Recipient)	Will only receive notification when orders they submitted are put on hold.
	CSR (Default Executor)	Will only receive notification when they are the one who placed the web order on hold.
	Web Order on Hold Auditor (Universal Interest)	Will receive notification when any web order is placed on hold.
	Web Order on Hold Account Auditor (Registered Interest)	Will only receive notification of web orders on hold for a specified account.
	Web Order on Hold Account List Auditor (Registered List Interest)	Will only receive notification of web orders on hold for an account on a specified list.
	Web Order Approver (Supervisory Interest)	Will receive notification when web orders are placed on hold for any user for which they approve/reject orders.
Web Order Cancelled	Web Order Submittal User (Default Recipient)	Will only receive notification when orders they submitted are cancelled.
	CSR (Default Executor)	Will only receive notification when they are the one who cancelled the web order.
	Web Order Cancelled Auditor (Universal Interest)	Will receive notification when any web order is cancelled.
	Web Order Cancelled Account Auditor (Registered Interest)	Will only receive notification of web orders cancelled for a specified account.
	Web Order Cancelled Account List Auditor (Registered List Interest)	Will only receive notification of web orders cancelled for an account on a specified list.
	Web Order Approver (Supervisory Interest)	Will receive notification when web orders are cancelled for any user for which they approve/reject orders.

Invoice Created	Invoice Account Interest (Registered Interest)	Will receive notification when an invoice is created for a specified account.
	Invoice Account List Interest (Registered List Interest)	Will only receive notification when an invoice is created for an account on a specified list.
Monitor Completed	Monitor Interest (Registered Interest)	Will only receive notification when a specified monitor is completed.
	Monitor Auditor (Universal Interest)	Will receive notification when any monitor is completed.
Workorder Closed	Workorder Account Interest (Registered Interest)	Will only receive notification when a workorder is closed for a specified account.
	Workorder Account List Interest (Registered List Interest)	Will only receive notification when a workorder is closed for an account on a specified list.
Urgent Notification Item Scanned	Urgent Notification Item Scan User (Default Recipient)	Will only receive notification when they scan an item from an urgent notification list.
	Urgent Notification Item Scan Auditor (Universal Interest)	Will receive notification any time an item from an urgent notification list is scanned by anyone.
	Urgent Notification Item Scan Account Auditor (Registered Account Interest)	Will only receive notification of urgent notification scans for a specified account.
	Urgent Notification Item Scan Account List Auditor (Registered List Interest)	Will only receive notification of urgent notification scans for an account on a specified list.
Web Order In Cart	Web Order Submittal User (Default Recipient)	Will only receive notification when they are the one who placed the item in the cart.
	CSR (Default Executor)	Will only receive notification when they are the one who placed the item in the cart.
	Web Order in Cart Auditor (Universal Interest)	Will receive notification when any item is placed in the cart.
	Web Order in Cart Account Auditor (Registered Interest)	Will only receive notification when items are placed in the cart for a specified account.
	Web Order in Cart Account List Auditor (Registered List Interest)	Will only receive notification when items are placed in the cart for an account on a specified list.
	Web Order Approver (Supervisory Interest)	Will receive notification when items are placed in the cart by any user for which they approve/reject orders.
Item Deleted	Item Deletion User (Default Recipient)	Will only receive notification when they are the one who deleted the item.
	Item Deletion Auditor (Universal Interest)	Will receive notification of any item that is deleted.
	Item Deletion Account Auditor (Registered Interest)	Will only receive notification when items are deleted for a specified account.

	Item Deletion Account List Auditor (Registered List Interest)	Will only receive notification when items are deleted for an account on a specified list.
Receipt Created	Receipt Creation Mobile User (Default Executor)	Will only receive notification when they are the one who generated the receipt.
	Receipt Creation Auditor (Universal Interest)	Will receive notification when any receipt is generated
	Receipt Creation Account Auditor (Registered Interest)	Will only receive notification when receipts are generated for a specified account.
	Receipt Creation Account List Auditor (Registered List Interest)	Will only receive notification when receipts are generated for accounts on a specified list
Workorder Created	Workorder Account Interest (Registered Interest)	Will only receive notification when a workorder is created for a specified account.
	Workorder Account List Interest (Registered List Interest)	Will only receive notification when a workorder is created for an account on a specified list.
Workorder Printed	Workorder Account Interest (Registered Interest)	Will only receive notification when a workorder is printed for a specified account.
	Workorder Account List Interest (Registered List Interest)	Will only receive notification when a workorder is printed for an account on a specified list.
Workorder Picklist	Workorder Account Interest (Registered Interest)	Will only receive notification when a workorder is picklisted for a specified account.
	Workorder Account List Interest (Registered List Interest)	Will only receive notification when a workorder is picklisted for an account on a specified list.
Workorder Routed	Workorder Account Interest (Registered Interest)	Will only receive notification when a workorder is routed for a specified account.
	Workorder Account List Interest (Registered List Interest)	Will only receive notification when a workorder is routed for an account on a specified list.
Workorder Delivered	Workorder Account Interest (Registered Interest)	Will only receive notification when a workorder is delivered for a specified account.
	Workorder Account List Interest (Registered List Interest)	Will only receive notification when a workorder is delivered for an account on a specified list.
Web Order Awaiting Approval	Web Order Submittal User (Default Recipient)	Will only receive notification of web orders they submit.
	Web Order Awaiting Approval Auditor (Universal Interest)	Will receive notification of all web orders waiting for approval.
	Web Order Awaiting Approval Account Auditor (Registered Interest)	Will only receive notification of web orders waiting for approval for a specified account.

	Web Order Awaiting Approval Account List Auditor (Registered List Interest)	Will only receive notification of web orders waiting for approval for an account on a specified list.
	Web Order Approver (Supervisory Interest)	Will receive notification of web order waiting for approval for any user for which they approve/reject orders.
Web Order Rejected	Web Order Submittal User (Default Recipient)	Will only receive notification when orders they submitted are rejected.
	Web Order Approver (Default Executor)	Will only receive notification when they are the one who rejected the web order.
	Web Order Rejected Auditor (Universal Interest)	Will receive notification when any web order is rejected.
	Web Order Rejected Account Auditor (Registered Interest)	Will only receive notification of web orders rejected for a specified account.
	Web Order Rejected Account List Auditor (Registered List Interest)	Will only receive notification of rejected web orders for an account on a specified list.
	Web Order Approver (Supervisory Interest)	Will receive notification of rejected web order for any user for which they approve/reject orders.

Notification Format: Click the grid picker to select from the available notification formats. Different formats are available depending on the event type selected.

Default – Provides basic information.

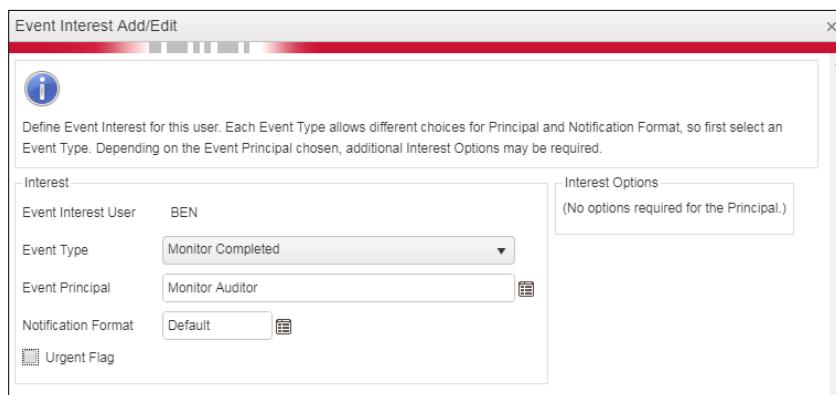
Detailed – Provides more detailed information.

Detailed XML – Provides an XML representation of the data that would be included in the notification.

Default NET SEND - Provides basic information in a NET SEND format. Currently, this option is only available for Monitor Completed notifications.

Urgent Flag: Select this check box to indicate this notification is urgent. Normally, notifications are grouped together and sent out based on the notification minimum interval set for the user. When marked urgent, the notification ignores the minimal interval setting and sends the notification immediately.

Interest Options: Depending on the event type and event principle selected, additional fields may become available in the Interest Options section. For example, if you select the event type, Monitor Completed with the event principal Universal Interest (Monitor Auditor), no additional fields are necessary because the user will be notified of all monitors completed.



If however, you select the event principal Registered Interest (Monitor Interest), an additional field appears under Interest Options for you to identify which monitor you want notification sent for. You can also request to be notified only if the monitor does or does not have results.

Sub-Accounts of a selected account can be included when determining interest. When an Event Principal requires an account option, an Include Sub-Accounts check box displays. Other Event Principals include Service Priority options.

When you have completed all fields, click **Add** to save the event interest. Click **Cancel** to return to the **Event Interest** grid.

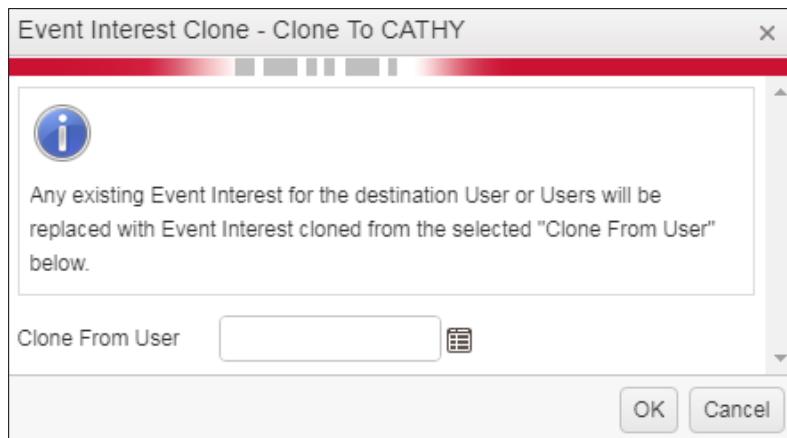
Edit Event Interests

To edit an existing event, in the **Event Interest** grid, right click on the event, and select **Edit**.

The only fields that can be edited are Notification Format, Urgent Flag, and Interest Options. Click **Edit** to save your changes.

Clone Event Interests

You can clone Event Interests from one user to another. In the **Event Interest User** grid, right click on the user you want to clone to, and select **Clone Interest To**.



Use the grid picker to select the user you want to clone event interest from. Click **OK**.

Periodic Refresh

Changes made to Event Interests do not take effect until after the Event Interest Service is refreshed, which is done periodically throughout the day. The refresh encompasses:

- refresh of the instances being serviced
- refresh of Accounts/SMTP Servers/Translatable Text
- refresh of Event Interest details for all Users

This is effectively identical to a stop/restart of the service itself.

During the service refresh period events will continue to occur and will be captured, but processing and delivery will not resume until initialization is complete. By default, refresh will occur every 30 minutes. This means that additions or changes could take up to 30 minutes to apply.

Reporting - Administration

Priority Service Request

A report is available for delivery workorders only that lists item pickup/delivery totals grouped by priority. From the **Administration** menu, **Reports** submenu, select **Priority Service Request**.

The screenshot shows the 'Priority Service Request Report' dialog box. At the top, there are date range pickers for 'From' and 'To' dates. Below that is a checkbox for 'Display Pie Chart'. The 'Accounts' section contains three options: 'All' (selected), 'List' (with a grid picker), and 'Range' (with three levels of date pickers from Level 1 to Level 3). A checked checkbox 'Include subaccounts' is also present under 'Range'. At the bottom, there is a 'Comments' text input field and two buttons: 'Submit' and 'Cancel'.

Date Range: Use the date pickers to select the date range for your report.

Show Pie Chart: When this check box is selected, a pie chart appears in the report along with the text table. The check box is not selected by default.

Accounts: Select the accounts you want included in your report. You can select All accounts or a Range of accounts (which can include one or multiple accounts). You can also select List, and use the grid picker to load a list of accounts that was previously created in the **Account** grid.

Comments: Enter any comments you want to appear in the top section of the report.

When you have completed all fields, click **Submit**. The report runs and is displayed.

Priority Service Request Summary

From 8/1/2009 to 8/18/2009
All Accounts.

Priority	Total Workorders	CONTAINERS		FILEFOLDERS		TAPES		Total Items
		<i>Delivery</i>	<i>Pickup</i>	<i>Delivery</i>	<i>Pickup</i>	<i>Delivery</i>	<i>Pickup</i>	
2 HOUR	1	3	0	0	0	0	0	3
3 HOUR	2	2	0	1	0	0	0	3
AFTER HOUR	2	4	0	16	0	0	0	20
Totals	5	9	0	17	0	0	0	26

Priorities By Item

2 HOUR	3 HOUR	AFTER HOUR
--------	--------	------------

Priorities By Workorder

2 HOUR	3 HOUR	AFTER HOUR
--------	--------	------------

Page 1 of 1
6/8/2017 1:38 PM

Revenue Detail by Account/Salesperson

NOTE: This report summarizes data contained in the Invoice Detail table. This table is updated as invoices are printed and saved.

This report compares revenue detail by account and salesperson. From the **Administration** menu, **Reports** submenu, select **Revenue Detail by Account/Salesperson**.

Revenue Detail by Account / Salesperson Report X

Trend Based On	Display and Compare	Period																
<input checked="" type="radio"/> Final Invoices	<input checked="" type="radio"/> Total Revenue	<input checked="" type="radio"/> Month																
<input type="radio"/> Draft Invoices	<input type="radio"/> Storage Only	<input type="radio"/> Quarter																
<input type="radio"/> Both Invoice Types	<input type="radio"/> Services Only	<input type="radio"/> Half Year																
Date Range																		
<input type="text"/> to <input type="text"/>																		
Recurring Services as Storage Revenue																		
<input type="button" value="Mark All"/> <input type="button" value="Clear All"/> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <input type="checkbox"/> MI (Monthly Inventory) <input type="checkbox"/> WI (Weekly Inventory) </div>																		
Accounts																		
<input checked="" type="radio"/> All <input type="radio"/> List <input type="button" value="grid icon"/> <input type="radio"/> Range <table border="1" style="margin-top: 5px;"> <tr> <td>Level 1 From</td> <td><input type="text"/></td> <td>To</td> <td><input type="text"/></td> </tr> <tr> <td>Level 2 From</td> <td><input type="text"/></td> <td>To</td> <td><input type="text"/></td> </tr> <tr> <td>Level 3 From</td> <td><input type="text"/></td> <td>To</td> <td><input type="text"/></td> </tr> <tr> <td colspan="4"> <input type="checkbox"/> Include subaccounts </td> </tr> </table>			Level 1 From	<input type="text"/>	To	<input type="text"/>	Level 2 From	<input type="text"/>	To	<input type="text"/>	Level 3 From	<input type="text"/>	To	<input type="text"/>	<input type="checkbox"/> Include subaccounts			
Level 1 From	<input type="text"/>	To	<input type="text"/>															
Level 2 From	<input type="text"/>	To	<input type="text"/>															
Level 3 From	<input type="text"/>	To	<input type="text"/>															
<input type="checkbox"/> Include subaccounts																		
Comments <input type="text"/>																		
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>																		

Trend Based On: Select whether you want the trend based on final invoices only, draft invoices only, or both.

Display and Compare: Select whether you want to display total revenue or revenue for storage or services only.

Period: Select the period by which you want the results grouped.

Date Range: Use the date pickers to select the date range for your report.

Recurring Services as Storage Revenue: All recurring services display. Select any you want to include as storage revenue. Select **Mark All** to include all recurring services. Select **Clear All** to clear all items.

Accounts: Select the accounts you want included in your report. You can select All accounts or a Range of accounts (which can include one or multiple accounts). You can also select List, and use the grid picker to load a list of accounts that was previously created in the **Account** grid.

Comments: Enter any comments you want to appear in the top section of the report.

When you have completed all fields, click **Submit**. The report runs and is displayed.

Revenue Detail by Account/Salesperson					
Trend Based On Final Invoices					
Monthly: From 7/1/2008 to 8/1/2009					
All Accounts.					
Account	Salesperson	Month / Year	Service Revenue	Storage Revenue	Total Revenue
1000	JKE	7 / 2008	\$60.67	\$51.84	\$112.51
1000	JKE	8 / 2008	\$4.31	\$6.48	\$10.79
1000	JKE	12 / 2008	\$4.31	\$6.48	\$10.79
1000\5000	JKE	12 / 2008	\$0.00	\$2.70	\$2.70
3000	BLL	12 / 2008	\$0.00	\$54.81	\$54.81
3000	BLL	1 / 2009	\$0.00	\$11.34	\$11.34
		<i>Total</i>	\$69.29	\$133.65	\$202.94
		<i>Average</i>	\$11.55	\$22.28	\$33.82

Productivity

Driver

This report compares volume of pickups and/or deliveries for one or multiple drivers by looking at activity records. The driver is considered to be the user logged into the mobile scanner. The Activity Sets representing pickups and deliveries are PICKUP_VAL and DELIV_VAL.

From the **Administration** menu, **Reports** submenu, select **Productivity** and then **Driver**.

Driver Productivity Report

User List

Period Month Quarter Half Year Year

Date Range to

Tally Pickup and Delivery Workorders Item Pickups and Deliveries

Pickups Deliveries

Items Containers Filefolders Tapes

Comments

Output Formats Text Table Line Chart Column Chart

Submit **Cancel**

User List: Click the grid picker to select the list of users (drivers) you want included in the report.

NOTE: User lists must first be created in the **User** grid in order to be available for selection in this field. For more information on creating a list, see the *Lists* chapter in the Operations User's Guide. The report can run with a user list of up to 1,000 users; however, only the first 30 user codes will display on the graph section of the report.

Period: Select the period by which you want the results grouped.

Output Formats: Select the format in which you want your report to display. You may select one or multiple options.

Date Range: Use the date pickers to select the date range for your report. You can enter a From Date, a To Date, or a date range. This date applies to the Scan Date/Time of the activity.

Tally: You can choose to tally just the number of workorders, or select a more detailed report that includes Pickup and Delivery totals listed separately by user. If you select Item Pickups and Deliveries, you can then choose to include Pickups, Deliveries, or both. In addition, one or more item types may be selected.

Comments: Enter any comments you want to appear in the top section of the report.

When you have completed all fields, click **Submit**. The report runs and is displayed.

Warehouseman

This report compares volume of warehouse activity for one or multiple warehouse persons per report. The warehouse person is considered to be the user logged into the mobile scanner.

From the **Administration** menu, **Reports** submenu, select **Productivity** and then **Warehouseman**.

Warehouseman Productivity Report

User List	<input type="button" value="grid picker"/>
Period	<input checked="" type="radio"/> Month <input type="radio"/> Quarter <input type="radio"/> Half Year <input type="radio"/> Year
Output Formats	<input checked="" type="checkbox"/> Text Table <input checked="" type="checkbox"/> Line Chart <input checked="" type="checkbox"/> Column Chart
Date Range	<input type="button"/> to <input type="button"/>
Tally	Actions Code (Description) <input checked="" type="checkbox"/> ADD (Add) INVENTORY (Inventory) MOVE (Move) PICKUP_VAL (Pickup Validation) REFILE (Refile)
Items	<input checked="" type="checkbox"/> Containers <input checked="" type="checkbox"/> Filefolders <input checked="" type="checkbox"/> Tapes
Comments	<input type="text"/>
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

User List: Click the grid picker to select the list of users (warehouse persons) you want included in the report.

NOTE: User lists must first be created in the **User** grid in order to be available for selection in this field. For more information on creating a list, see the *Listschapter* in the Operations User's Guide. The report can run with a user list of up to 1,000 users; however, only the first 30 user codes will display on the graph section of the report.

Period: Select the period by which you want the results grouped.

Output Formats: Select the format in which you want your report to display. You may select one or multiple options.

Date Range: Use the date pickers to select the date range for your report. You can enter a From Date, a To Date, or a date range. This date applies to the Scan Date/Time of the activity.

Tally: Select the Action you want included in the report. One or more Actions may be selected. You can then select the item types you want included.

Comments: Enter any comments you want to appear in the top section of the report.

When you have completed all fields, click **Submit**. The report runs and is displayed.

Trend

Inventory

This report compares inventory level within a date range by operational period. Inventory is defined as indexed containers, filefolders, or tapes with a status of In or Out only. Items with a status of Permout or Destroyed are not included. For the source data to exist for this report, invoices must be created and saved for the period being observed.

NOTE: For the most accurate trend reporting, the Invoice Cycle for all accounts chosen for this report should match, and the invoicing should be “in sync”. That is, ideally all the accounts on the report are all invoiced during the same period. So if the report shows monthly totals, all chosen accounts should have been invoiced during the same month.

From the **Administration** menu, **Reports** submenu, select **Trend** and then **Inventory**.

Trend Based On: Select whether you want the trend based on final invoices only, draft invoices only, or both.

Display and Compare: Select whether you want to display and compare containers, filefolders, or tapes.

Period: Select the period by which you want the results grouped.

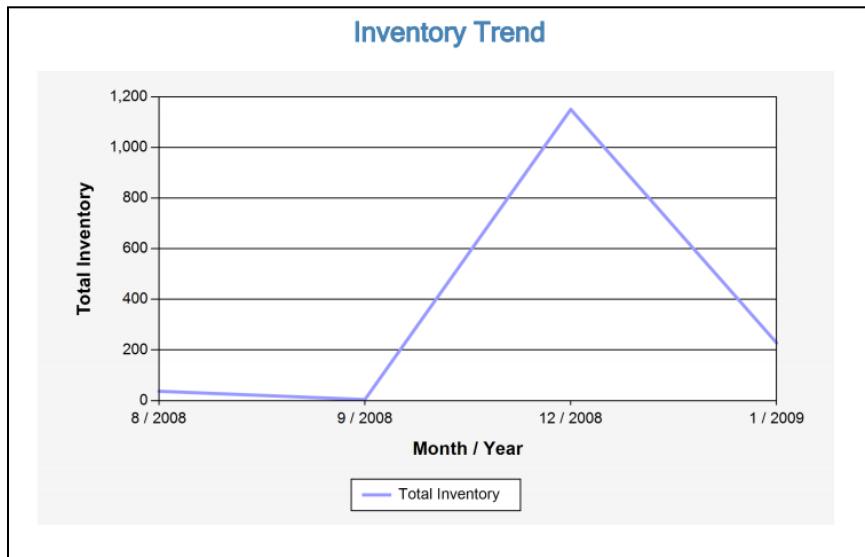
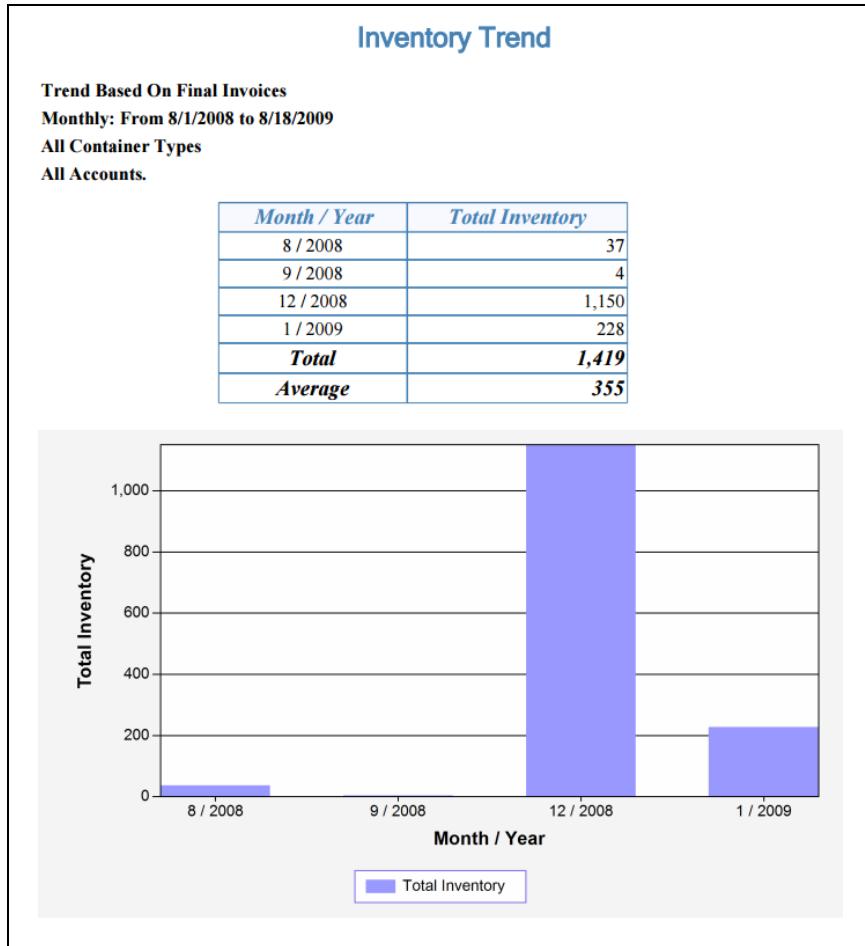
Output Formats: Select the format in which you want your report to display. You may select one or multiple options.

Date Range: Use the date pickers to select the date range for your report. You can enter a From Date, a To Date, or a date range. This date applies to the Invoice Ending date.

Accounts: Choose between All Accounts, Accounts on an account List, or a single Account Range.

Comments: Enter any comments you want to appear in the top section of the report.

When you have completed all fields, click **Submit**. The report runs and is displayed.



Revenue

NOTE: This report summarizes data contained in the Invoice Detail table. This table is updated as invoices are printed and saved.

This report compares revenue within a date range, by operational period. Revenue is defined as invoice totals before taxes. This means that any Actions with a parent Action of SURCHARGE are not included in the tallies.

From the **Administration** menu, **Reports** submenu, select **Trend** and then **Revenue**.

Trend Based On: Select whether you want the trend based on final invoices only, draft invoices only, or both.

Display and Compare: Select whether you want to display and compare Total Revenue, or revenue for Storage Only or Services Only.

Period: Select the period by which you want the results grouped.

Output Formats: Select the format in which you want your report to display. You may select one or multiple options.

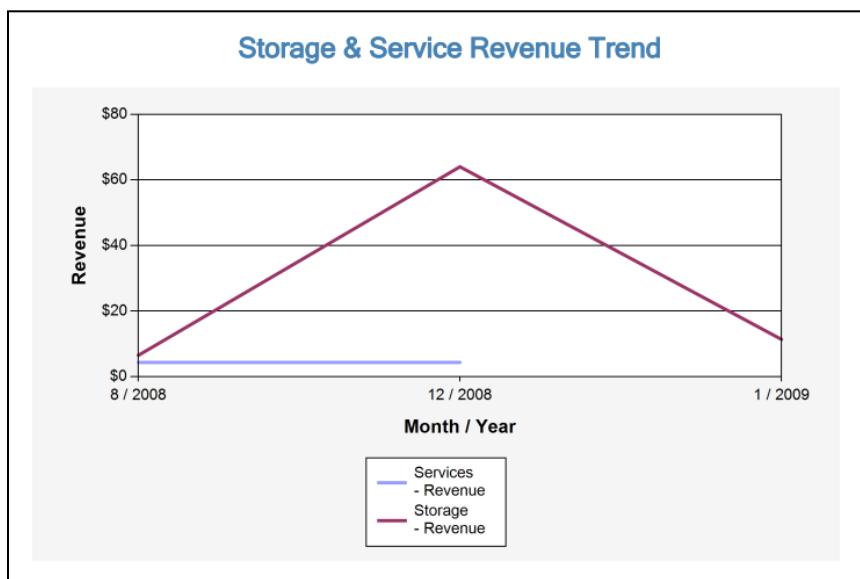
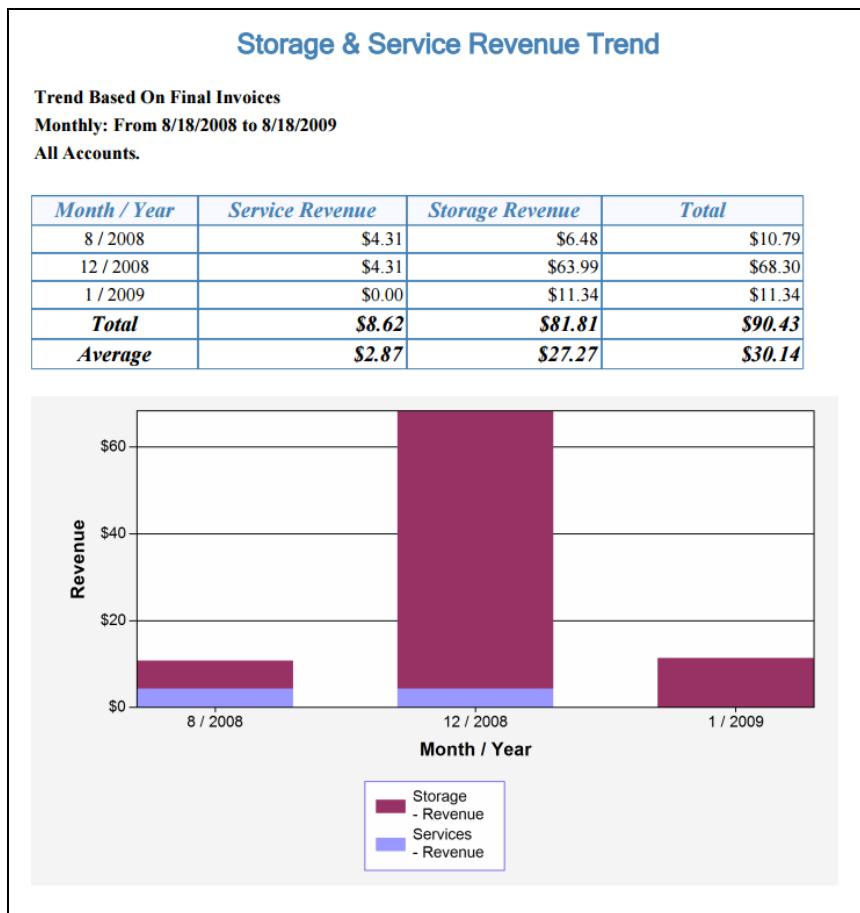
Date Range: Use the date pickers to select the date range for your report. You can enter a From Date, a To Date, or a date range. This date applies to the Invoice Ending date.

Recurring Services as Storage Revenue: Select Recurring Services that you want treated as storage revenue instead of services revenue. The actions are listed and include all actions with a parent action code of RECURSERV. Select **Mark All** to include all recurring services. Select **Clear All** to clear all items.

Accounts: Choose between All Accounts, Accounts on an account List, or a single Account Range.

Comments: Enter any comments you want to appear in the top section of the report.

When you have completed all fields, click **Submit**. The report runs and is displayed.



Revenue by Salesperson

NOTE: This report summarizes data contained in the Invoice Detail table. This table is updated as invoices are printed and saved.

This report displays trends in revenue sorted by salesperson. From the **Administration** menu, **Reports** submenu, select **Trend** and then **Revenue by Salesperson**.

The screenshot shows the 'Revenue by Salesperson Report' dialog box. It has several sections: 'Trend Based On' (radio buttons for 'Final Invoices', 'Draft Invoices', or 'Both Invoice Types'), 'Period' (radio buttons for 'Month', 'Quarter', 'Half Year', or 'Year'), 'Output Formats' (checkboxes for 'Text Table', 'Line Chart', and 'Column Chart', all of which are checked), 'Date Range' (two date pickers), 'Accounts' (radio buttons for 'All', 'List', or 'Range', with 'All' selected), and 'Comments' (a text input field). At the bottom are 'Submit' and 'Cancel' buttons.

Trend Based On: Select whether you want the trend based on final invoices only, draft invoices only, or both.

Period: Select the period by which you want the results grouped.

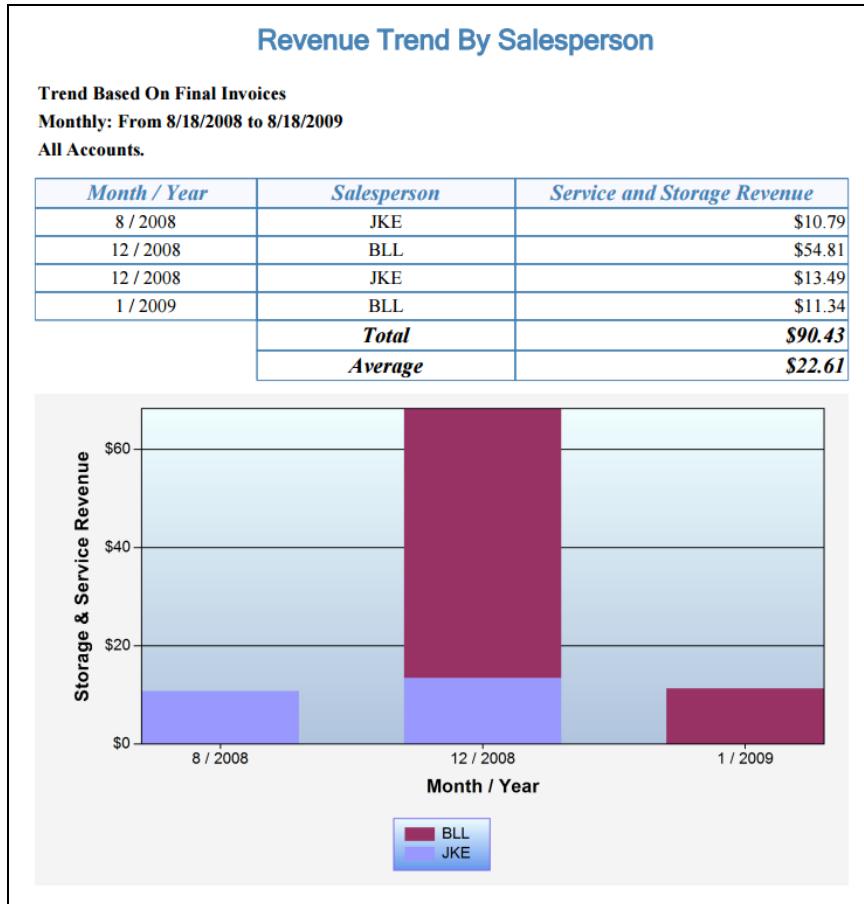
Display Format(s): Select the format in which you want your report to display. You may select one or multiple options.

Date Range: Use the date pickers to select the date range for your report. You can enter a From Date, a To Date, or a date range.

Accounts: Select the accounts you want included in your report. You can select All accounts or a Range of accounts (which can include one or multiple accounts). You can also select List to load a list of accounts that was previously created in the **Account** grid.

Comments: Enter any comments you want to appear in the top section of the report.

When you have completed all fields, click **Submit**. The report runs and is displayed.



Transaction

Account / Base / Scheduled

Transaction reports display all transactions, either base, account, or scheduled, that meet the criteria defined in the query.

NOTE: Only the Account Transaction report is available to the Web user. The Base Transaction and Scheduled Transaction report is not.

The screenshot shows the 'Account Transaction Report' configuration window. It includes sections for 'Page Settings' (Margins, Paper Size, Orientation), a 'Query' editor containing the filter 'Transaction!Level1AccountCode = "1000"', and 'Sort Fields' (Account Code ascending). There are also 'Report Information' fields for 'Heading' (set to 'Account Transactions') and 'Report Options' (Border Around Cells, Shade Alternate Rows). At the bottom are 'Submit' and 'Cancel' buttons.

Consolidated Transactions

This report consolidates your transactions. From the **Administration** menu, **Reports** submenu, select **Transaction** and then **Consolidated Transactions**.

Consolidated Transaction Report X

Use Pricing Effective as of

Include Scheduled Transactions

Report Content

Price List Account Transactions Only Base Transactions Only

Account Range

Level 1 From	<input type="text"/>	To	<input type="text"/>
Level 2 From	<input type="text"/>	To	<input type="text"/>
Level 3 From	<input type="text"/>	To	<input type="text"/>

Include subaccounts

Heading

Use Pricing that is effective as of: Enter an effective date. This field defaults to the current date. You cannot enter a date that has already passed.

Include Scheduled Transactions: Select this check box if you want to include all current transactions and any scheduled transactions. All transactions scheduled prior to or on the effective date indicated will be included.

Report Content: Three options are available.

Price List - This report prints all the transactions that could possibly be used in invoicing for each account. No notation is made of whether a transaction is UVB or not UVB.

Account Transactions Only - This report prints all standard and UVB Account transactions regardless of whether or not the account supports unit volume billing. An asterisk appears at the beginning of the Description for all UVB transactions printed on the report.

Base Transactions Only - This report prints all standard and UVB Base transactions. An asterisk appears at the beginning of the Description for all UVB transactions printed on the report.

NOTE: Transactions are sorted by Base Action, Action Code, Description. The order of the Base Actions is fixed.

Account Range: Enter the accounts you want included in the report. Select the *Include subaccounts* check box to include any subaccounts.

Heading: By default Consolidated Transaction Report is displayed as the report heading. It can be changed.

<i>Irvine Record Center</i>			
Effective Date: 6/9/2017			
Base Transactions Only			
* Unit Volume Billing			
Description	Quantity Break	Rate	Flat
Storage			
3460		0.2900	
3480		0.2900	
8 MM FILM		0.8700	
* Archive		0.2700	
Optical Disk		1.0500	
Storage of X-Ray box(s)		0.2000	
Storage-Standard Box		0.0000	
* STORE/BOX-TP	Yes	0.2100	
STORE/CONTAINER		3.0000	
* Three Cube		0.9400	
* Two Cube		0.7500	
Tracking			
TRACKING/DOCUMENT		0.0500	
Electronic Storage			
store image in database		0.1000	
Service			
* Access Item		0.7900	
* Access-Standard Box		1.0500	1 - 20
		0.7900	21 - 9999999
* Add Item		1.3100	
Add New Container		1.2500	1 - 25
		1.0000	26 - 100
		0.7500	101 - 9999999
* Add New Container		1.3100	1 - 25
		1.0500	26 - 100
		0.7900	101 - 9999999
ADD/CONTAINER		1.0000	
* Delivery Item	Yes	15.7500	1 - 1
		1.0500	2 - 9999999
* Delivery of X-Ray Box	Yes	21.5000	1 - 5

RSMobile Setup

RSMobile Setup Overview

1. Plug in the cradle to the serial/USB port on your computer and the power supply.
2. Charge your RSMobile scanner. Insert the RSMobile scanner in the cradle and allow the [batteries](#) to fully charge.
Optional: After charging, Configure the RSMobile scanner settings.
3. Install Windows Mobile Device Center.
4. Add a new RSMobile Device.
Optional: Add/initialize wireless printers (if applicable).
5. Initialize the RSMobile Device

Windows Mobile Device Center (WMDC)

WMDC is required for RSMobile device initialization.

- Synced, cradled at a workstation (no partnership with the workstation is required)

Network Connectivity

Network connectivity is required for day-to-day RSMobile communications. This connectivity can be established two ways, via:

- Wireless communication from RSMobile to an Access Point attached to the network
- WMDC network pass-through when cradled at a workstation attached to the network.

Windows Mobile Device Center

Windows Mobile Device Center (WMDC) is software designed for data synchronization between a device running a Microsoft Windows Mobile operating system and a Microsoft Windows Vista or later operating system.

Synchronization implies more than data transfer. Data transfer simply sends data between two computers. Data synchronization updates the data on both computers based on changes since the last synchronization.

O'Neil Stratus takes advantage of the data transfer capabilities of WMDC in two ways:

- O'Neil Stratus uses WMDC to send the RSMobile application to the cradled RSMobile scanner.

- O'Neil Stratus uses WMDC to establish a network connection for a cradled RSMobile scanner in which there is no wireless (radio) capability. WMDC needs to be installed on every computer where there is a cradle.

Install Microsoft Windows Mobile Device Center

With Windows Vista and Windows 7 when you first cradle the scanner and if the drivers are found and installed correctly from the internet, the WMDC application may download and install automatically.

NOTE: If the device is not found, check to make sure your cables are properly connected and the USB ports are operational.

If for whatever reason the drivers or WMDC do not install automatically, you can download and install it from the Microsoft website, www.microsoft.com.

You have the option of setting up a partnership (not recommended), or connecting as a guest.

Set Up as a Guest



Select *Connect without setting up your device*. The following message displays after it has connected.

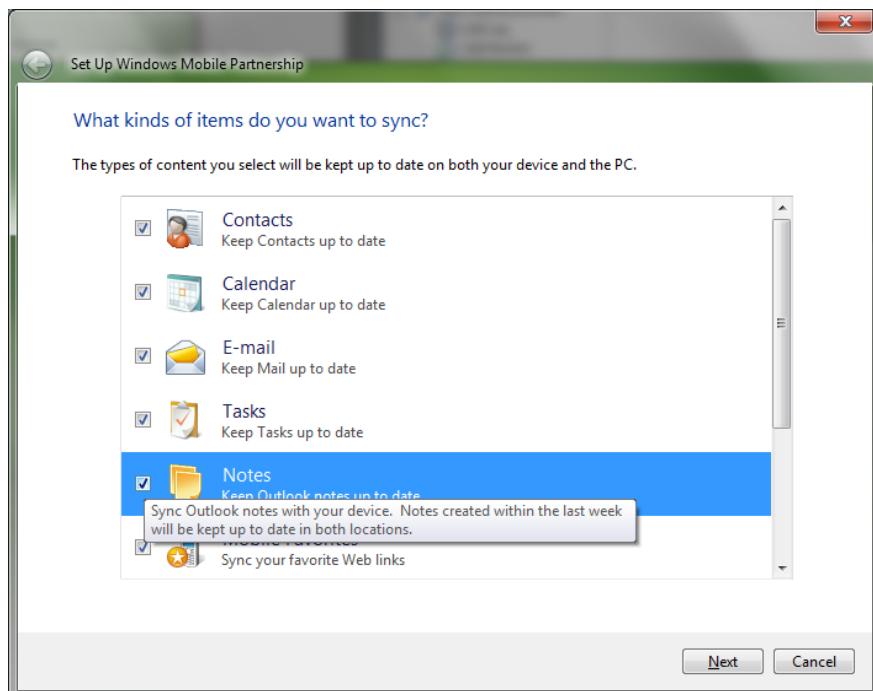


NOTE: In some cases you will need to click on *Connect without setting up the device* every time you cradle an RSMobile device in order for the device to communicate.

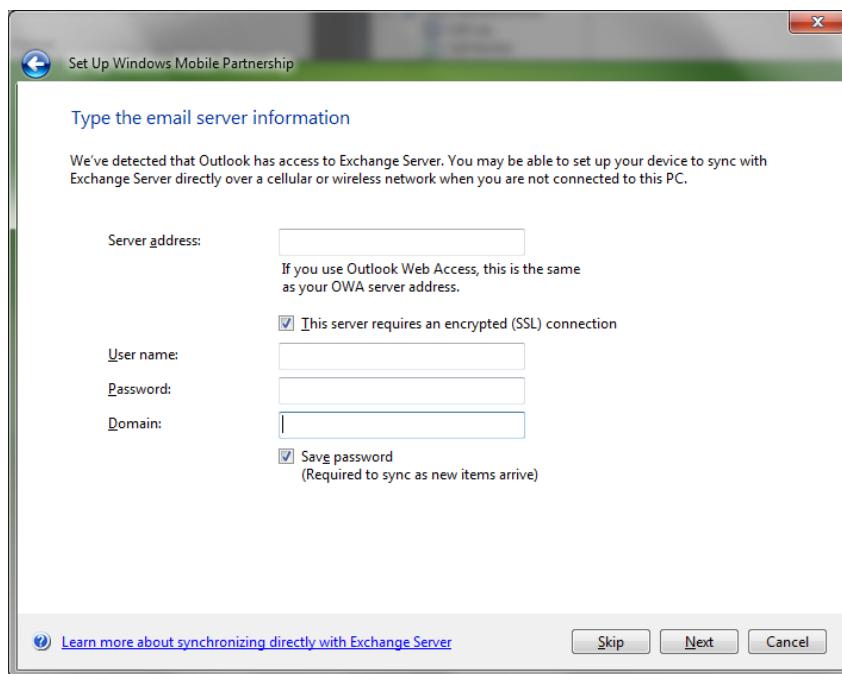
Set Up a Partnership (Not Recommended)



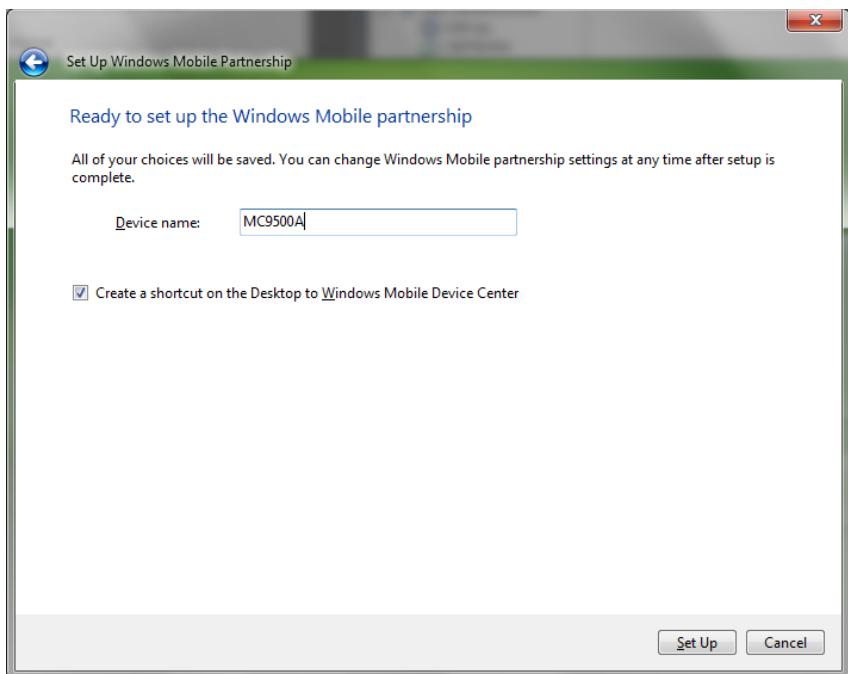
Select *Set up your device*.



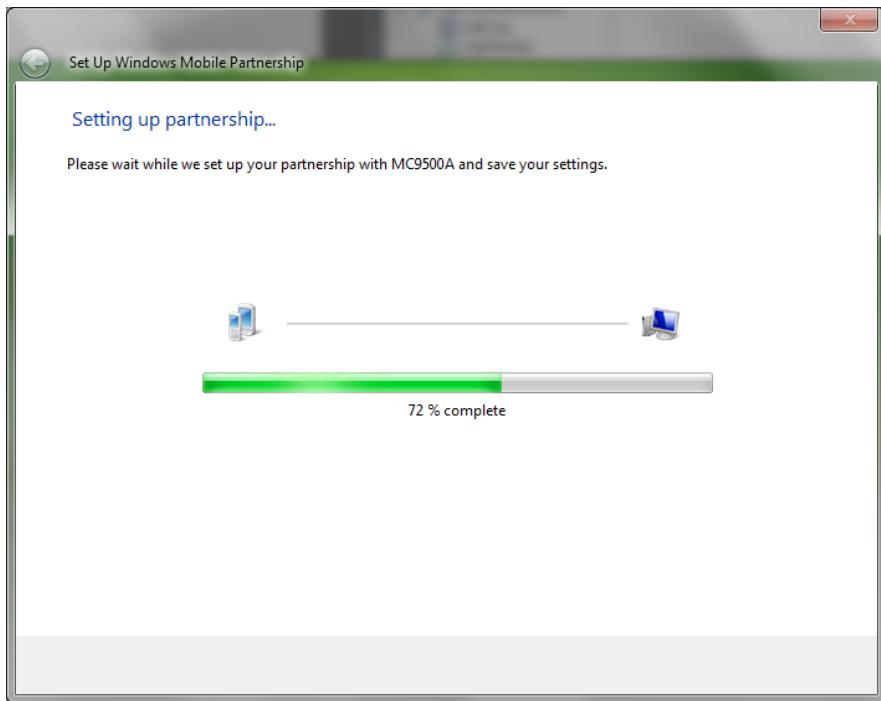
Select the components you want to sync, and click **Next**.



You may sync directly with an exchange server. Consult with your internal IT resource for this setup. Click **Skip**.



Enter a name for the device. Click **Set Up** to continue.



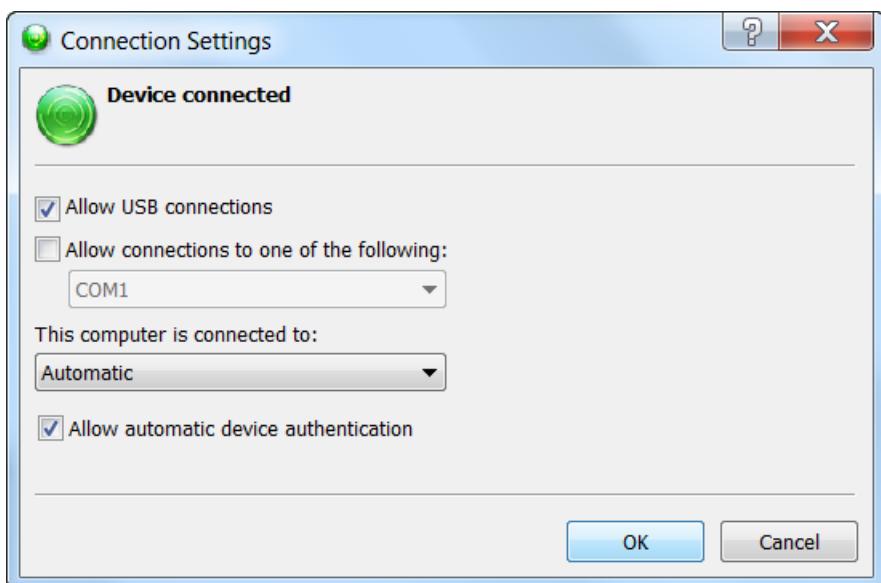
The partnership is now set up.

Disable Bluetooth

If you must create a partnership (not recommended) between the device and the workstation, it is recommended that you disable Bluetooth connectivity; otherwise you will disable the ability to pair and print to a Bluetooth receipt printer.



Select **Mobile Device Settings** and then **Connection settings**.



Clear the *Allow connections to one of the following* check box or at the very least choose a COM port instead of Bluetooth. Click **OK** to close the dialog box.

Initialize an RSMobile Device (RAD/RIO)

RSMobile devices need to be initialized before they can be used. There are three basic elements that must all come together for RSMobile initialization to be possible.

1. The RIO (RSMobile Initialization Operations) feature needs to be installed on each computer that will perform RSMobile initialization. As always, WMDC will need to exist on each of these computers as well.
2. The device needs to be registered in the O'Neil Stratus database.

3. Finally, a current RAD (RSMobileApplicationData.xml) file needs to be created.
4. With these elements in place, a valid RSMobile device can be cradled and initialized using the RIO program.

NOTE: The major/minor version in the RAD file should match the major/minor version of the RIO program.

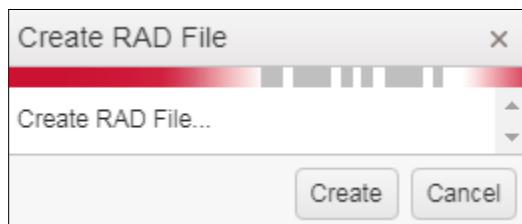
RSMobile Application Data (RAD) File

The RAD file contains an XML representation of all O'Neil Stratus database data required by the RSMobile initialization process. This includes Strings, Users, Barcode Lengths, Objects, Urgent Items, URL/DSN information, etc. The RAD file also contains all information about all RSMobile devices in the O'Neil Stratus database. This is the data that normally appears in the **Data Collection Device** grid, such as the UnitID, RegistrationID, Device Name, Active status, etc. Additionally, the file contains information about itself, such as creation date/time and user, and the O'Neil Stratus version that created the file.

This file has a fixed name of RSMobileApplicationData.xml. The RIO program expects the RAD file to be found in the Rio Standalone folder. The RSMobile password data is encrypted in the RAD file, but all other data is unencrypted.

Creation of the RAD File

From the **Administration** menu, **Setup** submenu, select **Data Collection Device**. From the **Options** menu, select **Create RAD File**.



Click **Create**. You are prompted for the destination location in which to create the RAD file, though the file name itself will always be RSMobileApplicationData.xml.

Select the folder where you want to save the file (RIO Standalone) and click **Save**.

The O'Neil Stratus database is queried and all required data is formatted and placed into the file. The creation date/time and user name is placed into the file, as well as the O'Neil Stratus version number. When the file has been successfully created, you are returned to the **Data Collection Device** grid.

Depending on the amount of data involved, RAD file creation should take anywhere from a few seconds to a minute or so. The RAD file is then ready for use by the RIO program.

The RAD file can be used to initialize any number of devices. The main concern with the RAD file is that its contents remain fairly current. Of course, the first RSMobile communication will synchronize the data, but you are encouraged to use reasonably fresh RAD files.

RSMobile Initialization Operations (RIO) Program

The Create RIO Installer feature creates a RIOStandaloneInstaller.msi file that contains everything needed for RSMobile scanner initialization.

Running the .msi file installs the following on the remote computer.

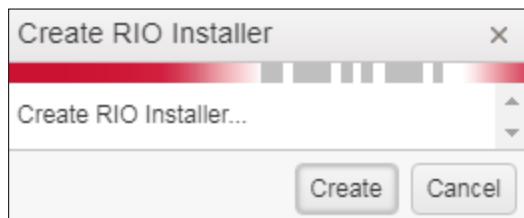
- RIO executable program
- RAD file with O'Neil Stratus data from the time the .msi file was created
- Common files from the time the .msi file was created

Initialize Device

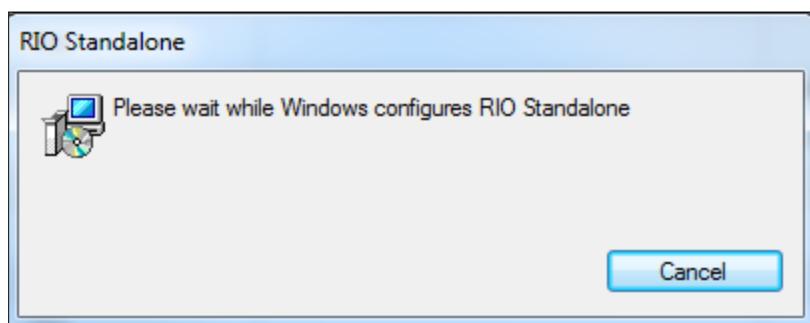
From the **Administration** menu, **Setup** submenu, select **Data Collection Device**. All existing devices are displayed in the grid.

Record Storage Data Collection Device								
	Options	Search	List	Format	Mark	Clear		
	Dump Device	Device Name	Unique U...	Platform ID	Registration ID	Default Lang...	Active	MAC Addr...
1	RSMobile	ANNE9590	00195B2...	1B0710...	7907B75E9CF...	English	Yes	
2	RSMobile	ES400	0013469...	C4B290...	78138D321CA...	English	Yes	
3	RSMobile	ES400_AD	0013469...	A92D73...	78138D321CA...	English	Yes	
4	RSMobile	es4002	0013469...	4E2AA1...	78138D321CA...	English	Yes	
5	RSMobile	MC67NA	73E65B7...	0106197...	9FF9B6EC9C2...	English	Yes	
6	RSMobile	MC67ND	73E65B7...	0118090...	9FF9B6EC9C2...	English	No	
7	RSMobile	MC9590	00195B2...	3331020...	7907B75E9CF...	English	No	40-83-DE-
8	RSMobile	MC9590B	00195B2...	0D3305...	7907B75E9CF...	English	Yes	

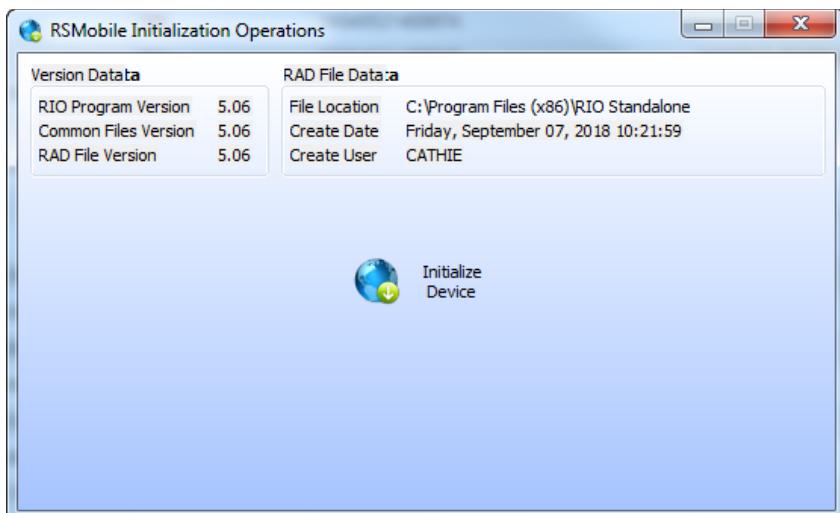
Mark the device you want to initialize and from the **Options** menu, select **Create Rio Installer**.



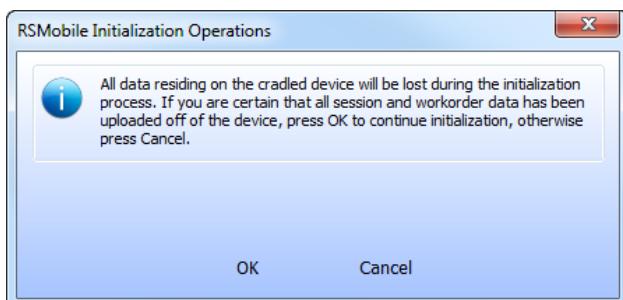
Click **Create**. The RIOCloudInstaller.msi file is created and the **Save As** dialog box opens. Save the file to your computer and then open and run it.



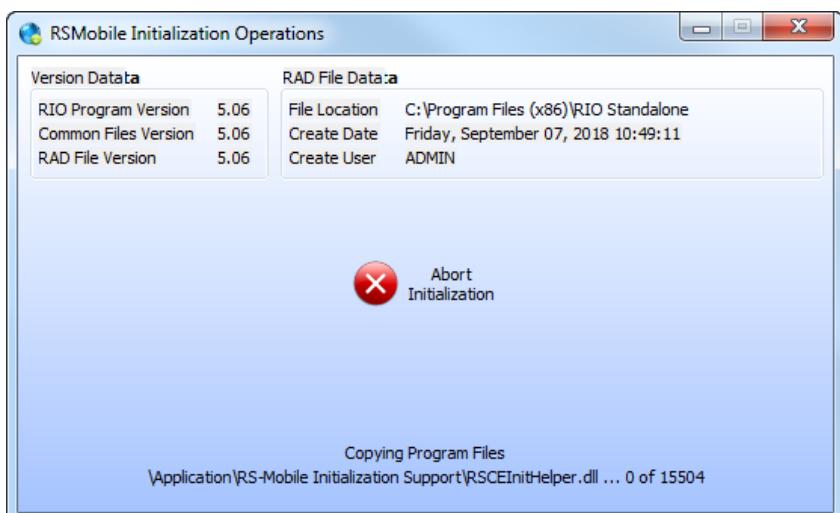
Once configured, the RIO program opens.



To initialize your device, click **Initialize Device**. You receive the following warning.



Click **OK** to continue. Initialization begins.



Once initialization has completed, the **Initialize Device** button is available again and you can continue initializing additional devices.

To close the program, click the **X** in the top right corner.

O'Neil Mobile Setup

O'Neil Mobile Overview

O'Neil Mobile is an Android and iOS app that allows your customers to search for and view the status of Web orders, and to look up information on items (see *O'Neil Mobile Customer Guide* for detailed information).

The app is available from the Google Play Store and the Apple App Store and runs on Android 4.1 or higher and iOS 6.0 or higher.



NOTE: All data is fully encrypted during transmission and when stored on the device.

O'Neil Mobile Setup Overview

NOTE: To access record center features (Operations) you must be using O'Neil Mobile 2.0.0.0 or higher.

O'Neil Mobile Setup

1. Identify the URL to your O'Neil Mobile server. For example: <https://MyWebSite.com/ONeilMobile>. This is provided in your Welcome email. [*Administration manual, O'Neil Mobile Setup chapter, URL/RCID section*]
2. Identify the database GUID for the database you want to connect to. This is provided in your Welcome email. [*Administration manual, O'Neil Mobile Setup chapter, URL/RCID section*]
3. Generate a QR Code. One is provided in your Welcome email. [*Administration manual, O'Neil Mobile Setup chapter, Generate QR Code section*]
4. Create valid O'Neil Stratus users/passwords for O'Neil Mobile users. Both Standard and Web users can log in to O'Neil Mobile. Admin cannot log in to O'Neil Mobile. [*Administration manual, O'Neil Mobile Setup chapter, Users section or Security/User Access chapter, Adding Users section*]
5. When a device attempts to log in for the first time, authorize the device. Turn on Collect GPS if you plan to capture GPS records on the device. [*Administration manual, Setup chapter, O'Neil Mobile Device Authorization*]

O'Neil Mobile Device

NOTE: O'Neil Mobile runs on Android 4.1 or higher and iOS 6.0 or higher.

1. Fully charge the O'Neil Mobile device.
2. Create a Google account for Android devices or an Apple account for iOS devices to download the O'Neil Mobile app from the Google Play Store or the Apple App Store.
3. In the appropriate app store, search for and download the O'Neil Mobile app.
4. Scan the QR Code and log in.

O'Neil Mobile Log in

Users

You will need to create users/passwords for O'Neil Mobile the same as you do for O'Neil Stratus and RSWeb.NET/O'Neil Order. Both Standard and Web users can log in to O'Neil Mobile. For more information on adding users, see the *Adding Users* section of the *Security/User Access* chapter.

URL/RCID (Record Center ID)

You will need to provide the O'Neil Mobile users with the URL and RCID needed to log in.

URL: This is the web address or computer name of the server where O'Neil Mobile Communications is installed. The URL will be provided to you by O'Neil Technical Support.

RCID: This is the record center GUID, which is a unique identifier for the record center. The GUID will be provided to you by O'Neil Technical Support.

The O'Neil Mobile users can type this information in the app, or you can provide them with a QR Code to scan the information.

Generate QR Code

A QR Code Generator is available on the O'Neil website to create a QR Code containing your URL and RCID information. This makes it much easier for O'Neil Mobile users to enter the needed information on their device.

You can access the code generator at <http://www.oneilsoftware.com/oneilmobile-qr>.

ONEILMOBILE QR CODE GENERATOR



Thank you for using the oneilMobile QR Code Generator.

oneilMobile URL*
 The oneilMobile URL requires a SSL connection for security, so the URL is required to start with HTTPS. This page will allow you to create a QR Code without HTTPS, but the oneilMobile app will not accept URLs without HTTPS.

RCID*

This is the GUID that is used to connect to the RS-SQL database on the system where oneilMobile is installed.

Email*

Enter an email where you would like the QR code sent. Your QR code will be emailed once created.

On Behalf Of:
 Company Name, Testing, etc.

Create QR Code

Form secured by Formstack

Enter your URL, RCID and Email address. Click **Create QR Code**.



Thank you for creating your oneilMobile QR Code!

Please use the following QR code for your oneilMobile connected users.


QRkickit

<https://myrecords.com/oneilmobile>

If the link appears broken, please copy the entire line below and paste into your web browser.

```
http://qrkit.com/api/q?d=%7b%22URL%22%3a%22https://myrecords.com/oneilmobile%22%2c+%22RCID%22%3a%2212345%22%7d&addtext=https://myrecords.com/oneilmobile&qsize=300
```

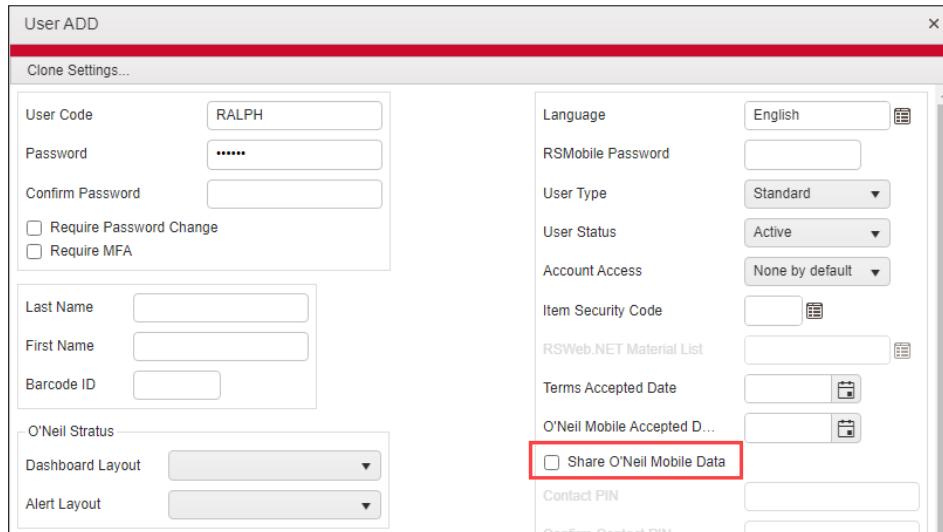
The code is generated and is also emailed to you. You can then forward the email to all of your O'Neil Mobile users.

Multi-User Support

A single device can be shared and logged into by multiple users for the completion of workorders and other tasks. The server can be configured to allow users to share local data or for all data to be kept separate. In either case, the sharing of devices will not clear the data of previous users.

System Mobile Key

The O'Neil Stratus **User Add/Edit** dialog includes a *Share O'Neil Mobile Data* check box. When selected, O'Neil Mobile uses the system-wide O'Neil Mobile encryption key for this user. This allows the user to share data; otherwise, the user-specific O'Neil Mobile encryption key is used.



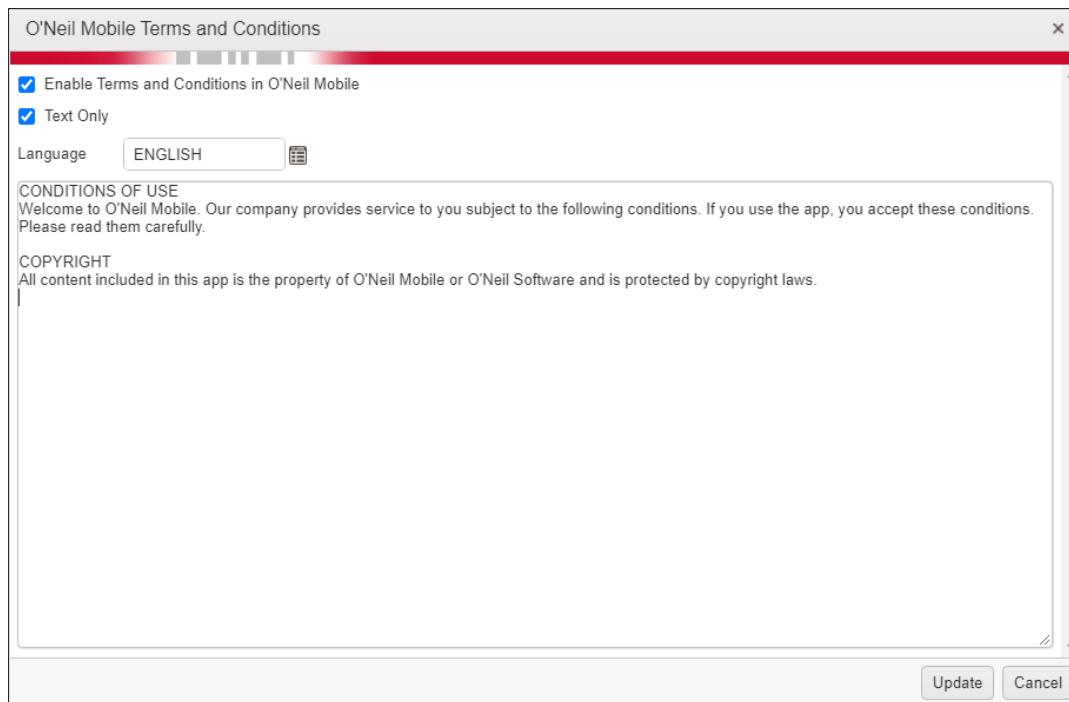
The O'Neil Mobile encryption key dictates which on-device O'Neil Mobile database is used.

O'Neil Mobile Terms and Conditions

A menu option is available in the **User** grid that allows you to add a customized Terms and Conditions page to O'Neil Mobile. When the O'Neil Mobile user accepts the Terms and Conditions, the date accepted is added to the User information in O'Neil Stratus. The next time the user logs in, they will not see the Terms and Conditions page.

Set up Terms and Conditions

From the **Administration** menu, **User** submenu, select **Users**. In the **User** grid, from the **Options** menu, select **O'Neil Mobile Terms and Conditions**.



Enable Terms and Conditions in O'Neil Mobile: Select the check box to turn the feature on. When enabled, the Terms and Conditions page will appear in O'Neil Mobile when a user logs in. Clear the check box to turn the feature off. The check box is not selected by default.

Text Only: When selected, you can only enter plain text in the text box. If you want to use HTML to format the text, clear the check box. **NOTE: HTML formatting is not currently supported in O'Neil Mobile, but will be available in a future release.**

Language: Terms and Conditions can be displayed in different languages. All languages previously set up in O'Neil Stratus will be available using the drop down arrow. The default language is English.

Text: This field is blank by default. Enter the text you want to appear on the Terms and Conditions page in O'Neil Mobile.

To add translated text for other languages, select the language and then add the new text. Once translations have been created, when you select a language in the Language field, the translated text will appear in the text box. The initial text entered here for English will be the default text that displays if a translation isn't found for other languages that exist.

O'Neil Mobile Accepted Date

An O'Neil Mobile Accepted Date field is available in the **User Add/Edit** dialog. The field is only available for user types that can log into O'Neil Mobile. It is initially blank and will be set to the current date once the O'Neil Mobile user accepts the Terms and Conditions.

User ADD

Clone Settings...

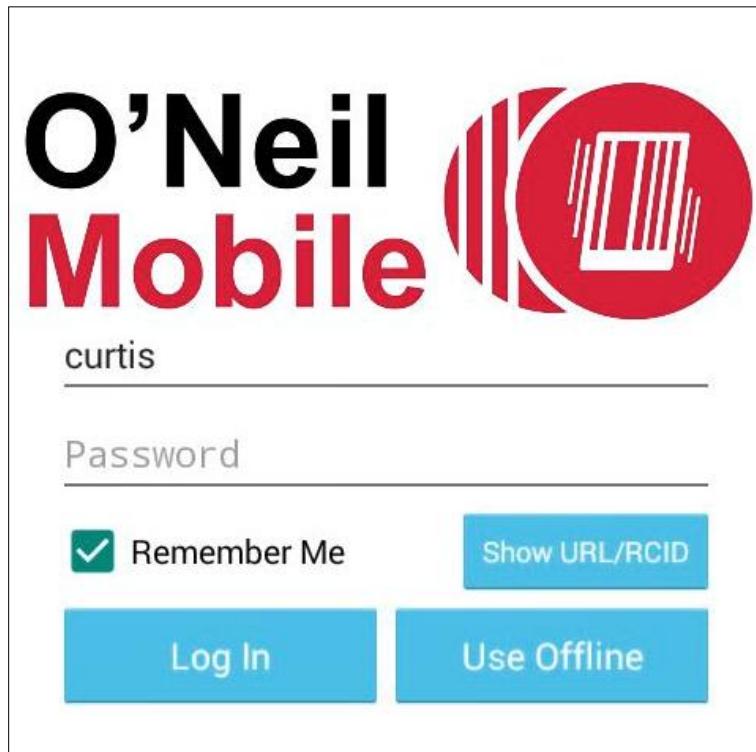
User Code	RALPH	Language	English
Password	*****	RSMobile Password	
Confirm Password		User Type	Standard
<input type="checkbox"/> Require Password Change		User Status	Active
<input type="checkbox"/> Require MFA		Account Access	None by default
Last Name		Item Security Code	
First Name		RSWeb.NET Material List	
Barcode ID		Terms Accepted Date	
O'Neil Stratus		O'Neil Mobile Accepted D...	
Dashboard Layout		<input type="checkbox"/> Share O'Neil Mobile Data	
Alert Layout		Contact PIN	
Confirm Contact PIN			

NOTE: Although standard users may be employees of the record center, they will still be prompted to accept the Terms and Conditions. If you do not want to display the Terms and Conditions for them, enter a date in the O'Neil Mobile Accepted Date field.

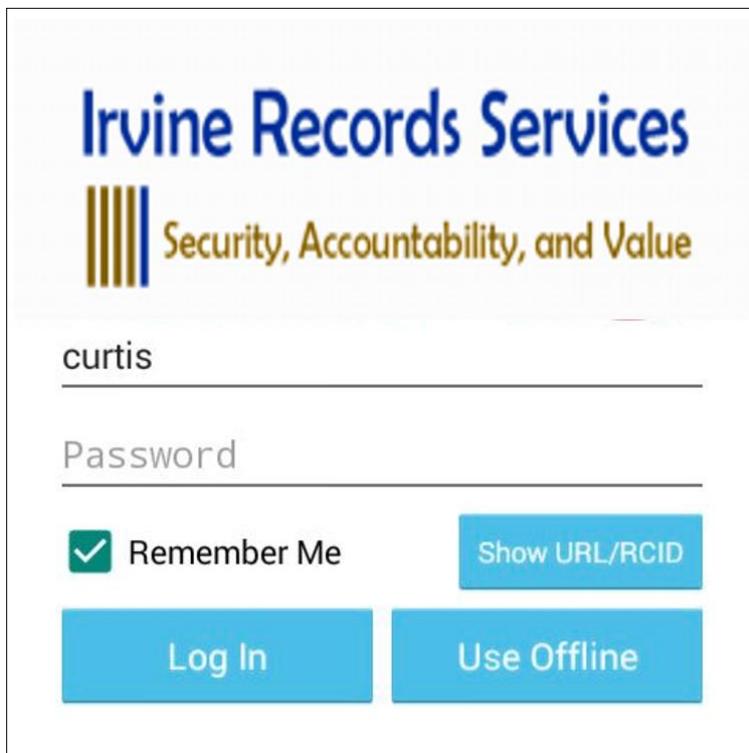
If at any time you want to force users to re-accept the Terms and Conditions, clear the acceptance date.

Custom Logo

The O'Neil Mobile logo on the Log In screen can be replaced with a custom logo.



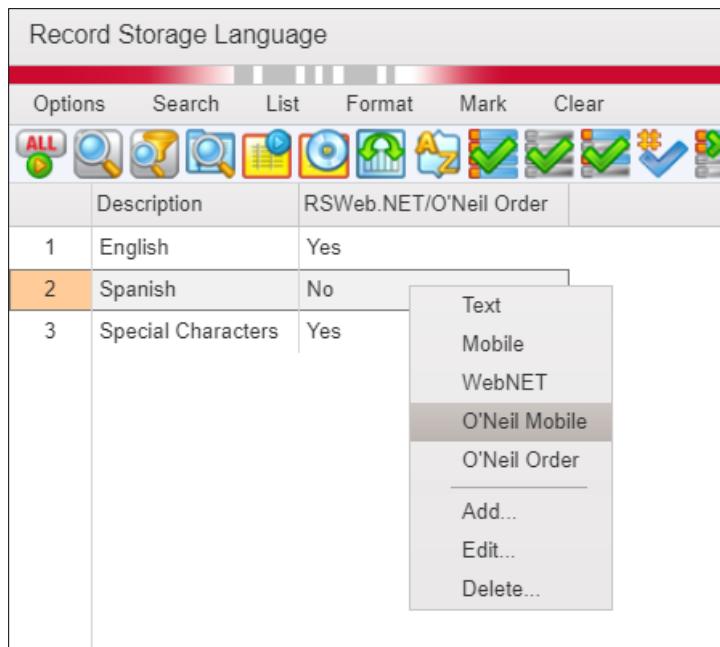
The application can scale any size image, but optimally it should be at least 160 pixels tall and have a width to height ratio of between 3.5:1 and 7:1. For reference, the O'Neil Mobile logo is 1080x160.



The logo file (named logonimage.png) should be sent to O'Neil to do the replacement for you. Contact O'Neil Technical Support for additional information.

O'Neil Mobile Translation

Language translation is available for O'Neil Mobile. It works the same as for Text, Mobile, WebNET, and O'Neil Order. For detailed information on translation, see the *Language Translation* chapter.



DataWedge Configuration

When using a Zebra Android device with O'Neil Mobile, you are required to setup a DataWedge Profile on the device. Profiles can be set up or imported.

Set Up the Profile

Follow these instructions to set up the O'Neil Mobile DataWedge Profile.

1. Launch the DataWedge application.
2. Select **New Profile** in the **Options** menu and give it any name (if the device has a hardware menu button, the three dots icon may not be displayed).
3. Select the newly created profile.
4. Scroll down to the Intent Output section and make the following changes:
 - a. Select Enabled.
 - b. For Intent action, enter "com.oneilsoft.oneilMobile.scanAction".
 - c. For Intent category, enter "com.oneilsoft.oneilMobile.scanCategory".
 - d. For Intent delivery, select Send via startService.
5. Select "Associated apps" near the top of the list:
 - a. From the **Options** menu select **New app/activity**.
 - b. Find and select "com.oneilsoft.oneilMobile" (app must be installed).
 - c. Find and select "*" to enable intent output to all Activities within the application.
6. Under Barcode Input the first option for "Enable/Disable scanner input" must be selected (enabled).

Import the Profile

When setting up multiple devices, the Profile can be exported from one and imported into the others. Or, a special file (dwprofile_oneilmobile.db) can be used for importing. This file can be downloaded from the oneilsoftware.com website.

1. Save the file to the device in the "/internal storage (share)/download" folder.
2. To import the data, open the DataWedge application and from the **Options** menu, select **Settings**, and then **Import Profile**.
3. Tap on the single dot to go to the root folder.
4. Tap on **sdcard/Download**.
5. Tap on dwprofile_oneilmobile.db file to import the profile.

Web Setup

RSWeb.NET Overview

Using RSWeb.NET, your customers can place their own orders. They can order services (deliveries, pickups), and materials, as well as conduct their own data entry. When one of your customers places an order for services or materials, the order appears on the **Web Order Detail** grid. You are then responsible for reviewing the order and creating a workorder. When your customer places a workorder, it appears in the **Workorder** grid.

Standard and Web Users can log in to RSWeb.NET. ADMIN cannot log in.

O'Neil Order Overview

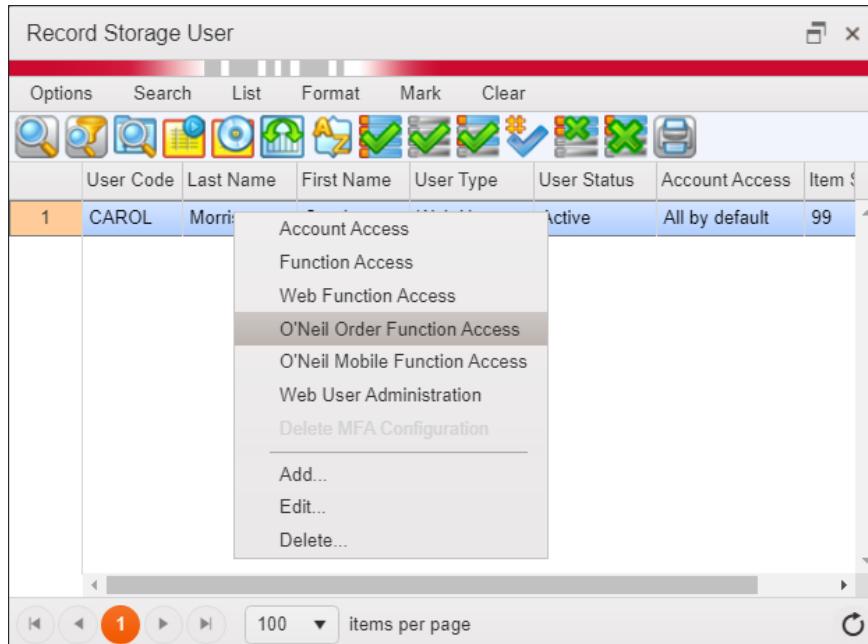
O'Neil Order is a newer Web application for your clients to use. It runs fast and efficiently across a variety of popular browsers (Chrome, Firefox, Safari, Internet Explorer, and Edge), providing your clients with an enhanced experience.

Built using the latest web development tools, O'Neil Order's modern interface provides full text search functionality, robust filtering options, and easier access to critical business information all in real-time. In addition, O'Neil Order allows you to customize company logos and colors, creating a seamless integration from your company website.

Standard and Web Users can log in to O'Neil Order. ADMIN cannot log in.

Function Access

Function access is available for RSWeb.NET and O'Neil Order. From the **Administration** menu, **User** submenu, select **Users**. Load the user you want to set function access for.



Right click on the user and select **Web Function Access** (for RSWeb.NET) or **O'Neil Order Function Access**. All features available for function access are displayed in the grid..

Record Storage O'Neil Order Function Access for CAROL					
	User Code	User Type	Feature	Permission	Access
1	CAROL	Web User	Container	Add	Yes
2	CAROL	Web User	Container	Edit	Yes
3	CAROL	Web User	Filefolder	Add	Yes
4	CAROL	Web User	Filefolder	Edit	Yes
5	CAROL	Web User	Tape	Add	Yes
6	CAROL	Web User	Tape	Edit	Yes
7	CAROL	Web User	Web Order	Create	Yes
8	CAROL	Web User	Workorder	Create	Yes
9	CAROL	Web User	Grid	Print	Yes
10	CAROL	Web User	Grid	Export	Yes

Right click on the feature you want to set function access for, and select **Edit**.

The screenshot shows a software dialog titled "O'Neil Order Function Access Add Edit". It has several input fields: "User Code" with the value "CAROL", "User Type" set to "Web User", "Feature" set to "Web Order", "Permission" set to "Create", and "Access" set to "Yes". At the bottom right are "Edit" and "Cancel" buttons.

Make the necessary change and click **Edit**.

Licensing

Licensing works the same for RSWeb.NET and O'Neil Order.

If a licensing error occurs, a generic message is displayed in O'Neil Order telling the user to contact the record center to report the problem. The message includes a license error number. Below is a list of error numbers along with a description of each.

Error #	Description
100	Application expired
101	Maximum number of containers has been exceeded
102	Maximum number of filefolders has been exceeded
103	Maximum number of tapes has been exceeded
104	Maximum concurrent users has been exceeded (web or standard, depending on the type of user logging in)
105	License was in temporary mode and the grace period has expired

Web Setup Options

Several menu options are available under the **Web Setup** menu in Administration. One option is for creating custom data entry forms for your web users to use when adding, editing, or global editing items. Others let you customize the way each grid displays for each web user. You can select the columns you want to display as well as the sort order of the data. You can also set up queries that can be used by your web users. Another menu option lets you assign the forms you created, along with the column, sort, and query groups you created to specific users.

A default data entry form has been included for each function and is automatically assigned to each user. Column and sort default formats have also been included. Therefore, it is possible to use RSWeb.NET and O'Neil Order without creating custom forms or formats if you prefer.

NOTE: Some of the options apply to both RSWeb.NET and O'Neil Order. Others are not yet available in O'Neil Order.

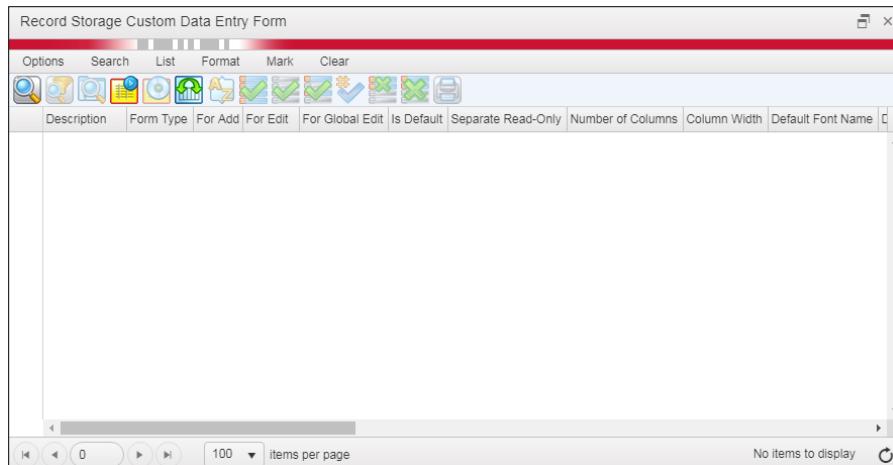
Forms

The **Forms** menu option is used to design custom forms for your web users. You can decide which field you want to appear, the layout of the input fields, the color of the forms and more. Once the forms have been created, you determine which users you want to have access to certain forms and whether the form should appear as the default form for that user.

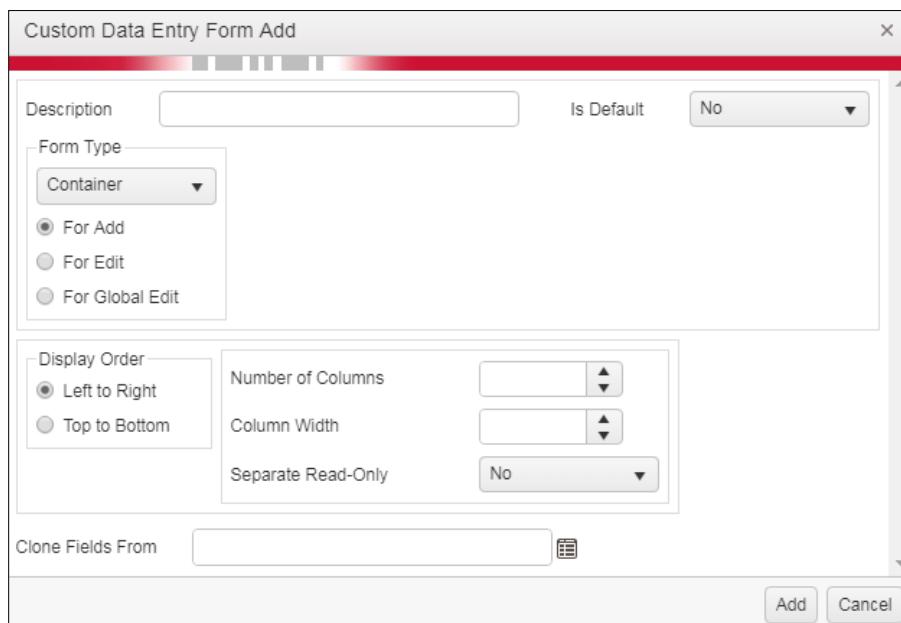
Any forms created are available to both RSWeb.NET and O'Neil Order users (if assigned to them).

Create Forms

From the **Administration** menu, select **Web Setup** and then **Forms**. The **Custom Data Entry Form** grid appears.



To add a new form, right click anywhere in the grid and select **Add**. The **Custom Data Entry Form Add** dialog appears.



In the top section of the dialog, you can define how the form is to be used.

Description: Type a description for the form.

Is Default: Select whether or not this form is to be used as the default form. There can only be one default form for each form type. For example, there can be only one default form for Container Add, one for Container Edit, one for Container Global Edit, one for Filefolder Add, etc. Any form that has this field marked Yes will be available to all web users.

Form Type: Click the drop down arrow to select whether this form is for Container, Filefolder, or Tape. Next, select whether this form is to be used for adding items, editing items, or global editing items.

The middle section of the dialog is used to design the form.

Display Order: In this section you can select how you want your fields to display. They can display Left to Right or from Top to Bottom.

Number of Columns: Select the number of columns you want to display on your form. The default setting is 2.

1 to 9 columns are supported in RSWeb.NET.

1 to 3 columns are supported in O'Neil Order.

Column Width: Select the width for each column. This is measured in pixels.

In RSWeb.NET this can be set to a fixed width or dynamically sized based on the number of columns and width of the form. It is recommended that you leave the setting at zero, in which case the width is automatically formatted based on the number of columns in the form.

In O'Neil Order it is always dynamically sized based on the width of the form.

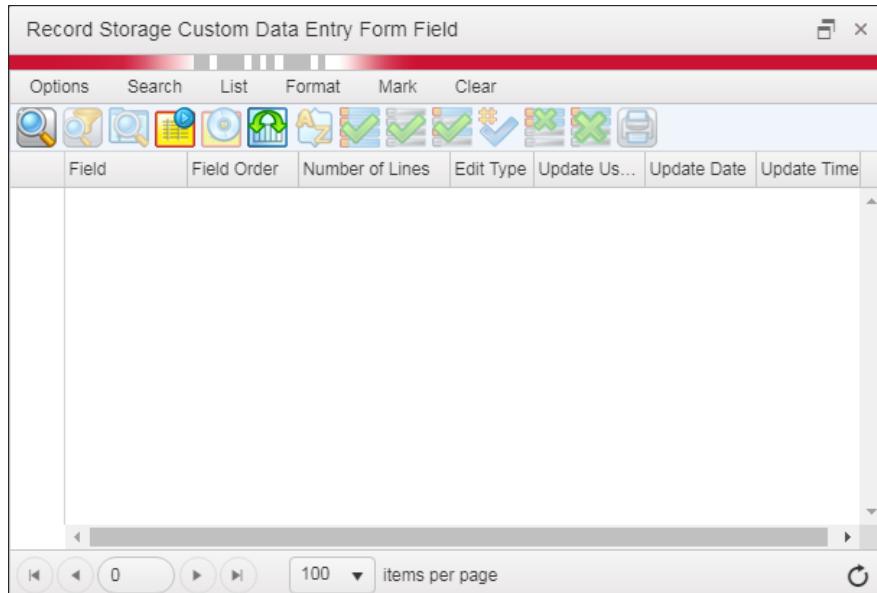
Separate Read-Only: Select whether or not you want any read-only fields displayed separately. If you select Yes, the read-only fields display in a separate section at the top of the form.

Clone Fields From: To copy the fields from an existing form, click the grid picker. Right click on the form you want to copy from, and select **OK**. Leave this field blank if you want to select your own fields (see *Add Fields* section below).

When all fields have been completed, click **OK** to save the form.

Add Fields

Once you create a form, you need to identify the fields you want it to include. In the **Custom Data Entry Form** grid, right click on the form you want to add a field for and select **Fields**. The **Custom Data Entry Form Field** grid appears.



Right click anywhere in the grid and select **Add**.

The screenshot shows the "Custom Data Entry Form Field Add" dialog box. It contains the following fields:

- Field:** A dropdown menu.
- Number of Lines:** A numeric input field set to 1, with up and down arrows for adjustment.
- Edit Type:** A dropdown menu set to "Edit".
- Tag:** An empty text input field.
- Default:** An empty text input field.
- Value:** An empty text input field.
- Mask:** An empty text input field.
- Description:** An empty text input field.
- Regular Expression:** A section with an "Expression" input field and a "Description" input field.
- Range:** An empty text input field.

At the bottom right of the dialog are "Add" and "Cancel" buttons.

This dialog is used to identify the field you want to add to the form, as well as the attributes of that field. Most of the fields shown are optional. You can select a field, accept the default settings and it will work fine. If, however, you want to further define the field, you have that option also.

Field: Click the drop down arrow to select the field you want to add to the form. A drop down selection list can be set up for the Account, Category, and Record Series fields. For more information on setting it up, see the *Drop Down Lists* section below.

Number of Lines: Enter the number of lines to include for the field. This is most useful when selecting fields such as Contents or Description.

Edit Type: Click the drop down arrow to select whether the field is an edit field, read-only, or a hidden field. Read-only fields appear on the form but cannot be edited. Hidden fields do not appear on the form.

Tag: Enter the name you want to appear for this field. This lets you change the field name to something that may be more familiar to your customer. If nothing is entered, it defaults to the actual name of the field.

Default Value: If you want to include a default value for this field, enter it here. The value shows up automatically when the user views the form, but can be changed (unless it is a read-only field).

If a date field is selected, a Type field is displayed.

The screenshot shows a configuration panel with a title 'Default'. It has two main sections: 'Type' and 'Value'. The 'Type' section contains a dropdown menu with 'Manual' selected. Below it is an empty text input field for 'Value'.

Select Manual to manually enter the desired value or select Current Date Time. If you select Current Date Time, the field indicates the current date and time is to be used and the field cannot be edited. .

If an item code field is selected, the same Type field appears. You can select from the following options:

Manual: This allows you to enter your own value.

Use Pre Auto Increment Scheme: Fills in the barcode when the Add form is displayed. The Web user can actually see the generated barcode before it is submitted. This option will update the database with the next barcode. The barcode will be used up even if the user cancels the Add.

Use Post Auto Increment Scheme: Fills in the barcode when the user submits the form, but only if the barcode is blank. This gives the Web user the option to enter their own barcode. It also only uses up a barcode when the user submits the form. If you want it to always use the auto incrementing barcode, you can mark the item code field as hidden.

For the Perm flag field, you can enter 1 (Yes) or 0 (No) for the default value.

For the Account Code field, one or more levels of the account code can be fixed (read-only) while allowing the web user to enter another level.

To mark an individual level as read-only, when entering the value in the Default Value field, enclose the text with {~ and ~}.

Examples:

- | | |
|-------------------|--|
| {~0100~} | Sets the Level 1 code to 0100 and makes it read-only. The web user can change Level 2 and Level 3 codes. |
| {~0100~}\0001 | Sets the Level 1 code to 0100 and read-only, and the Level 2 code to 0001, but not read-only. |
| {~0100~}\{~0001~} | Sets the Level 1 code to 0100 and read-only, and the Level 2 code to 0001 and read-only. |

If you select a built-in option, you cannot edit this field directly. If you want to change the value, select another built-in option, or choose the Manual mode to type in a value.

Mask:

Mask: Here you can enter an input mask. When an input mask is defined, placeholders are defined by the character property. When inputting data, the user can only replace a placeholder with a character that is of the same type as the one specified in the input mask. An invalid entry is rejected.

For example, if you want the user to enter a four digit number you can use #####. This means that the character must be numeric (0-9), and four characters must be entered.

NOTE: Account, Date/Time, Contents, and Description fields do not use the MaskEdit control, and therefore masks are not supported for these fields.

More detailed information on masks is available on the internet.

Description: This is a description for the mask.

Regular Expression:

Expression: A regular expression is a special text string for describing a search pattern. You are probably familiar with wildcard notations such as *.txt to find all text files in a file manager. More detailed information on regular expressions is available on the internet.

For example, if you want the data entered to be three numbers followed by three letters you would enter [0-9][0-9][0-9][A-Z][A-Z][A-Z].

Description: This is the message that displays if data entered does not match the regular expression.

Range:

Lower: If you require an entry to fall within a certain range, enter the lower range here.

Upper: If you require an entry to fall within a certain range, enter the upper range here.

Description: This is the message that displays if data entered does not fall within the specified range.

Maximum Drop Down Rows: Determines the number of rows displayed in the drop down list for a field. The maximum allowed is 30. Currently only available for the Account, Category, and Record Series fields. In addition to this, if you enter any value greater than zero for the Item Security Code field, a standard dropdown will be created.

Keep Value As Default: When set to Yes, this keeps the last entered data as the default in the field. It can, however, be changed by the user.

Validate Field On Exit: Immediately validates an entry when you tab out of the field. If an invalid value is entered, you receive a message.

Required: When set to Yes, the field is required and must be completed on the form. The default setting is No. Note, if the field selected is a predefined required field, the drop down arrow is disabled and automatically set to Yes.

Double Entry: Double Entry only applies to O'Neil Order. When set to Yes, the O'Neil Order user is required to type the entry twice.

When you have completed all fields, click **Add** to add the field to the form. Continue adding all additional fields you want included in the form.

Drop Down Lists

NOTE: The drop down list feature only applies in RSWeb.NET. In O'Neil Order, these fields always have a grid picker that lists all available options.

While adding fields to a custom data entry form, you can set up a drop down selection list for the Account, Category, and Record Series fields. This means that the Web user can select an entry from a drop down list, rather than having to type the entry themselves.

To use the drop down list, the Edit Type needs to be set to Edit, and the Maximum Drop Down Rows must be set to a number other than zero (maximum allowed is 30). The Maximum Drop Down Rows field determines the number of rows displayed in the drop down list. If either field does not meet these conditions, the drop down list feature is turned off.

NOTE: Default Value, Regular Expression, Range, and Required field validations are supported when using the drop down list feature, but Mask is not.

When the drop down list feature has been set, in RSWeb.NET the Web user has a drop down arrow to click and then can select from a list.

The screenshot shows the 'Container Add' page for O'Neill University. At the top right, it says 'Welcome CAROL' and 'Logout'. On the left, there's a sidebar with 'Available Forms' (Basic Container Entry, Set As Default), 'RSWeb.NET 3.03.00 Copyright © 2007 O'Neill Software, Inc. All rights reserved.', and a message 'Session will timeout in approximately 59:45 minutes.' In the center, there are two input fields: 'Account Number' (containing '2000') and 'Container Barcode *'. Below these is a table titled 'Account Code' with rows for 1044, 1045, 1046, 1047, 1048, IC201, IC202, IC204, IC206, and IC306. To the right of the table is a 'Back To Results' button. On the far left of the table, there's a small icon with arrows pointing up and down, indicating a dropdown menu.

Without the drop down feature turned on, there is no drop down arrow and the Web user must type the entry in the field.

This screenshot shows the same 'Container Add' page as above, but without the dropdown feature for the 'Account Number' field. The 'Account Number' field is now a standard text input field without a dropdown arrow. The rest of the interface, including the table below and the sidebar on the left, remains the same.

NOTE: As previously stated, the drop down list feature only works for the Account, Category, and Record Series fields.

Rules Regarding Forms

- If the account field is added to a form, by default, it is not a required field. You can manually set the account to Required if needed.
- When adding items, if the barcode entered is within a valid account range and the account field is not included on the form (or the field is included but is left blank), the item is added with the account specified in the account range.
- When adding items, if the barcode entered is not within a valid account range, and the account field is not included on the form (or the field is included but is left blank), the item is not added and the following error displays: "Barcode is not within a valid range for your account".
- When adding filefolders to existing containers, if the entered account does not match the container's account, the add/update fails and the following message displays: "The entered account does not match the container's account".

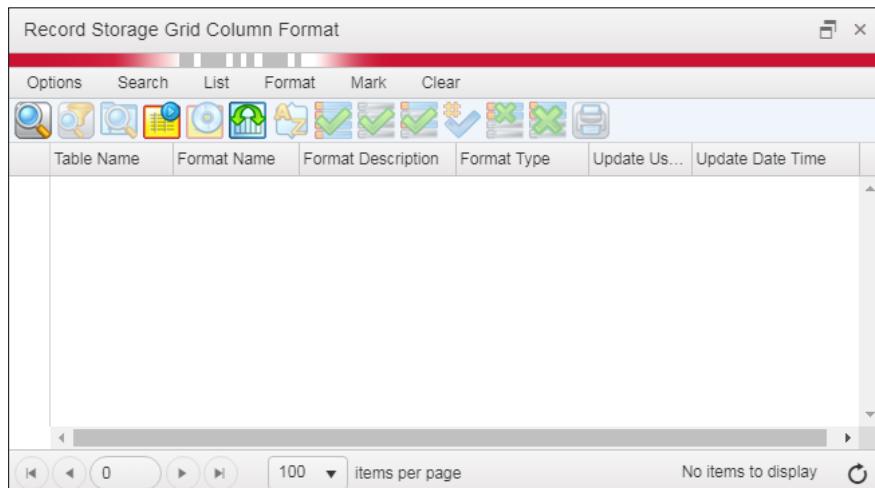
- When adding filefolders to existing containers, if no account is entered, the filefolder inherits the account of the container.

Columns

The Column menu options are used to create column formats and then add those formats to groups. The groups can later be assigned to users.

Column Formats

To view existing or create a new column format, from the **Administration** menu, select **Web Setup** and then **Column Formats**.



NOTE: A default format has been created for you by O'Neil. It does not display in the **Grid Column Format** grid. Several other pre-defined column formats have also been included. These formats do display in the grid and can be edited. If no other formats are available for a user, the default format is used.

To add a new format, click **Add**. The **Grid Column Format Add** dialog appears.

Grid Column Format Add

Format Name	<input type="text"/>								
Format Description	<input type="text"/>								
Table Name	<input type="button" value="▼"/>								
Format Type	<input type="button" value="▼"/>								
Columns	<table border="1"> <thead> <tr> <th>Column Name</th> <th><input type="button" value="Choose"/></th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> </tr> </tbody> </table>	Column Name	<input type="button" value="Choose"/>						
Column Name	<input type="button" value="Choose"/>								
Column Details <table border="1"> <tr> <td>Default</td> <td>Override</td> </tr> <tr> <td><input type="text"/> Heading</td> <td><input type="text"/></td> </tr> <tr> <td><input type="button" value="Width"/></td> <td><input type="button" value="▼"/></td> </tr> <tr> <td><input type="text"/> Format</td> <td><input type="text"/></td> </tr> </table>		Default	Override	<input type="text"/> Heading	<input type="text"/>	<input type="button" value="Width"/>	<input type="button" value="▼"/>	<input type="text"/> Format	<input type="text"/>
Default	Override								
<input type="text"/> Heading	<input type="text"/>								
<input type="button" value="Width"/>	<input type="button" value="▼"/>								
<input type="text"/> Format	<input type="text"/>								
<input type="button" value="Add"/> <input type="button" value="Cancel"/>									

Format Name: Type the name for the new format.

Format Description: Type a brief description for the format. The Format Name and Description display in RSWeb.NET and O'Neil Order, so be sure to use something that will help the web user identify the format.

Table Name: Click the drop down arrow to select the table to which this format applies.

Format Type: Select a format type.

User Defined Non Default - This format must be assigned to a group to be available to the user, unless it is set as the default. It is not Web user or Standard user specific.

User Defined Web Default - This format overrides the pre-defined default format supplied by O'Neil for Web users only.

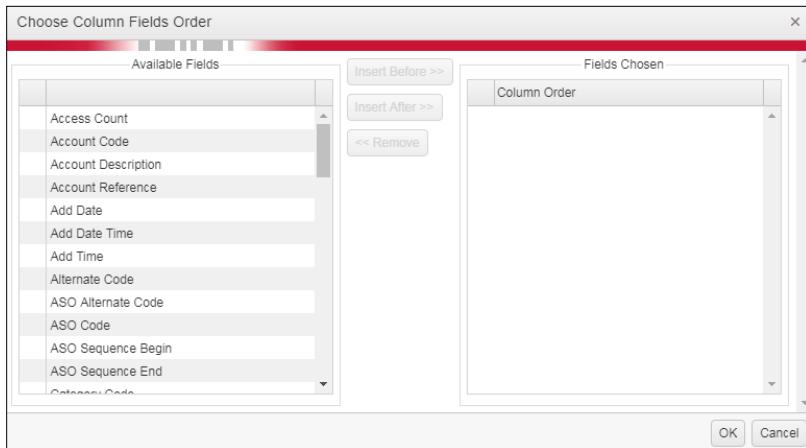
User Defined Standard Default - This format overrides the pre-defined default format supplied by O'Neil for Standard users only.

User Defined Web Global - This format is available to choose from for all Web users. It does not need to be assigned to a group.

User Defined Standard Global - This format is available to choose from for all Standard users. It does not need to be assigned to a group.

User Defined All Global - This format is available to choose from for all users. It does not need to be assigned to a group.

Columns: Click **Choose** to select the columns you want included for this format.



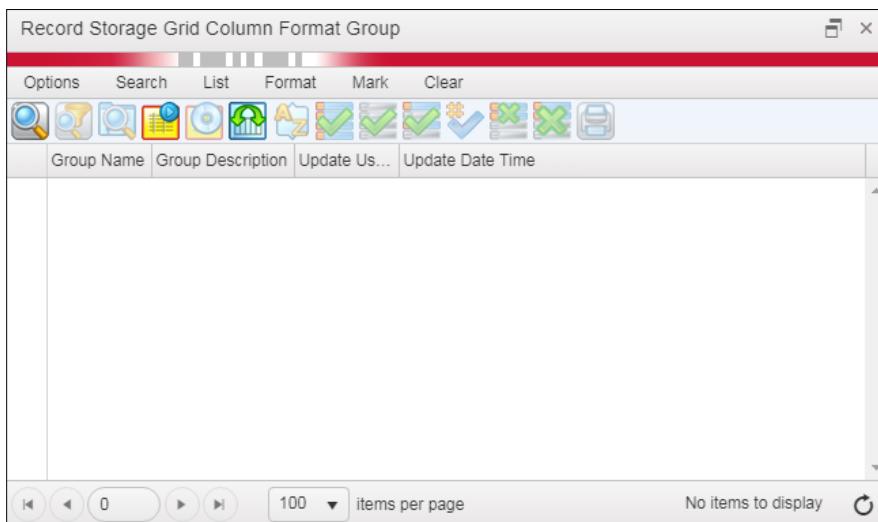
Column Details: In the Column Details section you can override the default settings for Heading, Width, and Format. Select a column in the Columns section and then make the desired changes.

Once your column formats have been added, any that were set to User Defined Non Default must be assigned to a group.

Column Format Groups

Once User Defined Non Default formats are created, they need to be added to a group before they can be assigned to users.

To create new column format groups and add formats to them, from the Administration menu, select **Web Setup** and then **Column Format Groups**.



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

Grid Column Format Group Add

Group Name	<input type="text"/>				
Group Description	<input type="text"/>				
Formats	<table border="1"><tr><td>Format Name</td><td><input type="button" value="Choose"/></td></tr><tr><td colspan="2"><input type="button" value="Remove"/></td></tr></table>	Format Name	<input type="button" value="Choose"/>	<input type="button" value="Remove"/>	
Format Name	<input type="button" value="Choose"/>				
<input type="button" value="Remove"/>					
Format Detail					
Format Name					
Format Description					
Table Name					
Format Type					

Group Name: Type the name for the group.

Group Description: Type a brief description for the group.

Formats: Click **Choose** to select the existing formats you want included in this group.

Choose Grid Column Format

Table Name	<input type="button" value="▼"/>
Format Name	<input type="button" value="grid"/>

Click the drop down arrow next to the Table Name field to select the table. Next, click the grid picker next to the Format Name field to select the format you want included in this group.

Grid Column Format				
 Options Search List Format Mark Clear				
Table Name	Format Name	Format Description	Format Type	Update Us...
1 Container	Data Entry Columns	Basic Data Entry Columns	User Defined ALL Global	ADMIN
2 Container	Expanded View with Content/Des...	Expanded View with Contents and Des...	User Defined ALL Global	ADMIN
3 Container	Expanded View with Status	Expanded View with Status	User Defined ALL Global	ADMIN
4 Container	Expanded View with UDFs	Expanded View with User Defined Fields	User Defined ALL Global	ADMIN
5 Container	RSWeb Default Columns	RSWeb Default Columns	User Defined ALL Global	ADMIN

Right click on the format and select **OK** to add it to the group. You can add several formats to each group.

Format Detail: This section displays detailed information for the format highlighted in the Formats field.

When you have finished entering information, click **Add** to add the group.

Sort

The Sort menu options are used to create sort order formats for the grids and then add those formats to groups. The groups can later be assigned to users.

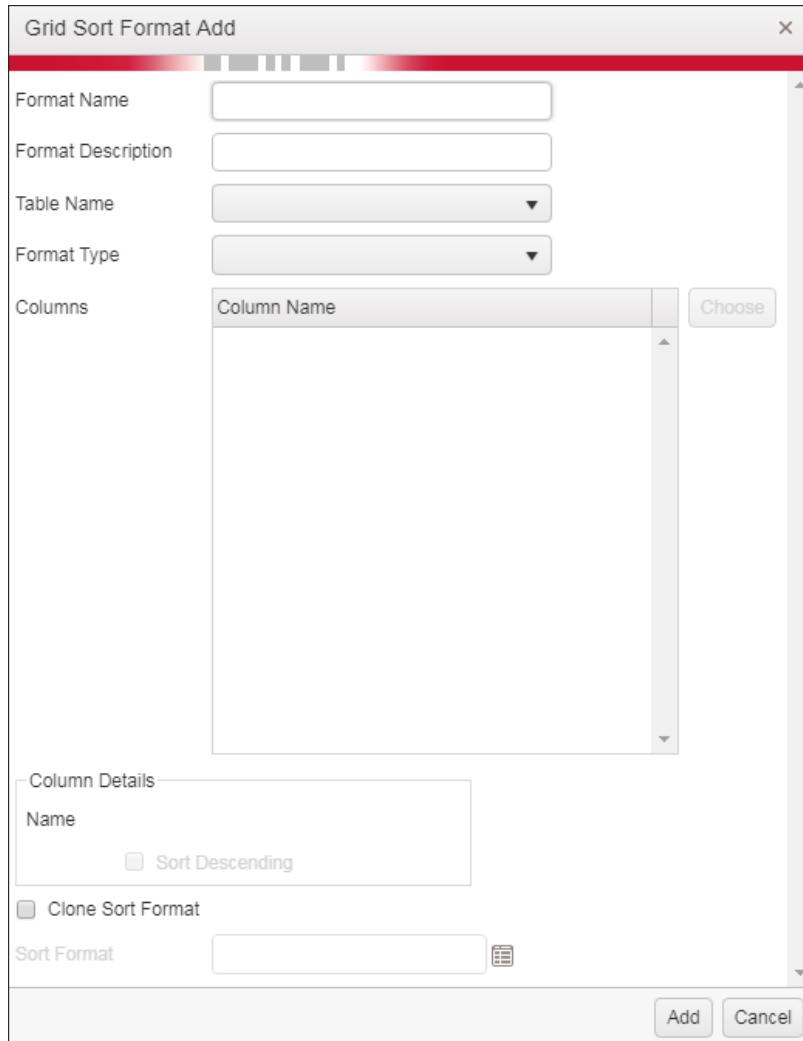
Sort Format

To view existing or create a new sort format, from the **Administration** menu, select **Web Setup** menu, and then **Sort Formats**.

Record Storage Grid Sort Format						
 Options Search List Format Mark Clear						
Table Name	Format Name	Format Description	Format Type	Update User Code	Update Date Time	
						No items to display

NOTE: Several pre-defined sort formats have been included.

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



Format Name: Type the name for the new sort format.

Format Description: Type a brief description for the format. The Format Name and Description display in RSWeb.NET and O'Neil Order, so be sure to use something that will help the web user identify the format.

Table Name: Select the table to which this format applies.

Format Type: Select a format type.

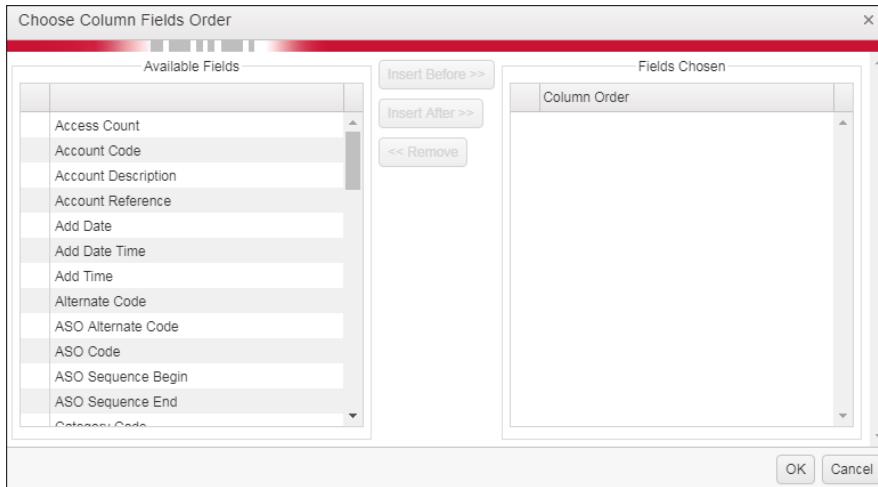
User Defined – This format must be assigned to a group to be available to the user. It is not Web or Standard specific since it must be assigned to a group.

Web Global – This format is available to choose from for all Web users. It does not need to be assigned to a group.

Standard Global – This format is available to choose from for all Standard users. It does not need to be assigned to a group.

All Global – This format is available to choose from for all users. It does not need to be assigned to a group.

Columns: Click **Choose** to select the columns you want to sort by. You can select more than one column.



Column Details: In the Column Details section for each column selected, indicate if you want to sort in descending order.

Clone Sort Format: To clone a sort format, select the check box. When the check box is selected, the Columns and Column Details fields are cleared and disabled since you will be cloning from another sort format instead.

In the Sort Format field, use the grid picker to select the Sort Format you want to clone from.

You must select a Table Name in order for the Sort Format choice list to display existing sort formats. Only the Sort Formats related to the selected Table Name are displayed.

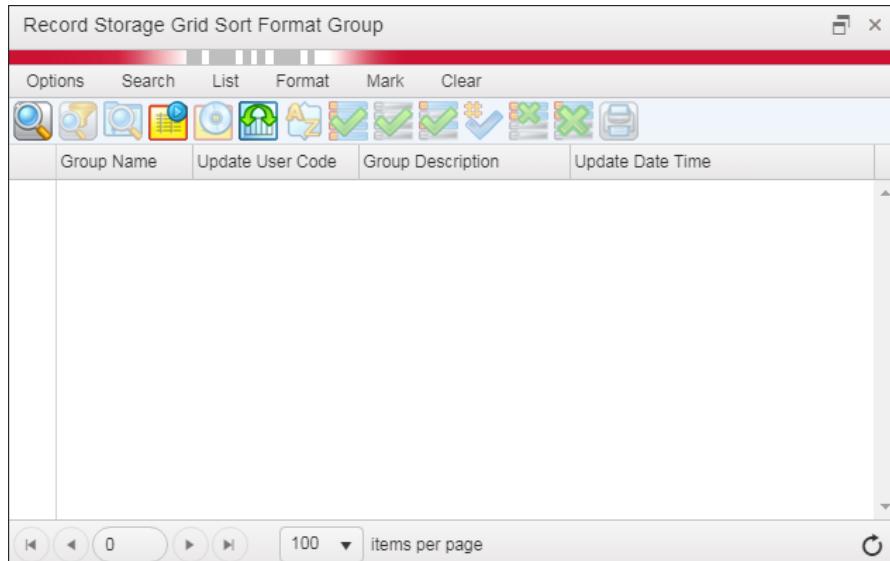
NOTE: You can clone from one format to another even if the Format Type is different as long as the Table Name is the same for both formats.

Once your sort formats have been added, any that were set to User Defined must be assigned to a group.

Sort Format Groups

Once User Defined sort formats are created, they need to be added to a group before they can be assigned to users.

To create new sort format groups and add formats to them, from the **Administration** menu, select **Web Setup**, and then **Sort Format Groups**.



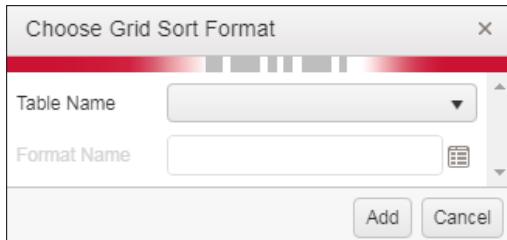
To add a new format group, right click anywhere in the grid and select **Add**.

Group Name	<input type="text"/>
Group Description	<input type="text"/>
Formats	Format Name <input type="button" value="Choose"/> <input type="button" value="Remove"/>
Format Detail	Format Name Format Description Table Name Format Type
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

Group Name: Type the name for the group.

Group Description: Type a brief description for the group.

Formats: Click **Choose** to select the existing sort formats you want included in this group.



Click the down arrow next to the Table Name field to select the table. Next, click the grid picker next to the Format Name field to select the format you want included in this group.

	Table Name	Format Name	Format Description
1	Container	Account Code / Alt Code	Account Code / Alternate
2	Container	Account Code / Item Barcode	Account Code / Item Bar
3	Container	Add Date / Alt Code	Add Date / Alternate Cod
4	Container	Add Date / Item Barcode	Add Date / Item Barcode
5	Container	Alt Code	Alternate Code
6	Container	Contents Line One / Alt Code	Contents Line One / Alter

Click **Add** to add the format to the group. You can add several formats to each group.

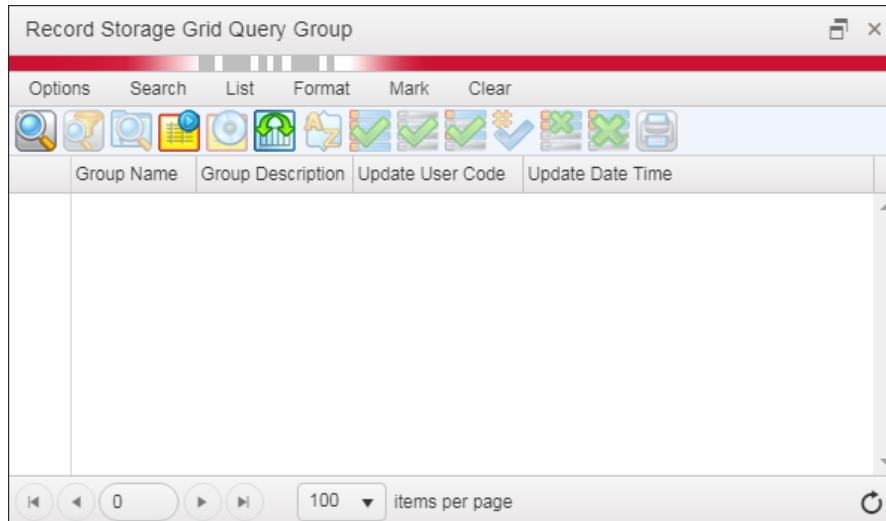
Format Detail: This section displays detailed information for the format highlighted in the Formats field.

When you have finished entering information, click **Add** to add the group.

Query Groups

Quick Queries that already exist in O’Neil Stratus can be added to groups that are then assigned to specific users. This lets the web user easily search for items based on the query and criteria they select.

To create new query groups, from the **Administration** menu, select **Web Setup**, and then **Query Groups**.



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

	Name

Group Name: Type the name for the group.

Description: Type a brief description for the group.

Query Names: To add a query to the group, click **Add**.

The screenshot shows a dialog box titled "Grid Query Group Detail Add". It contains five input fields: "Name" (text input), "Description" (text area), "Table Name" (dropdown menu), "Query Type" (dropdown menu), and "Query Code" (dropdown menu). A "Copy Query Text" button is located next to the "Query Code" dropdown. At the bottom right are "Add" and "Cancel" buttons.

Name: Type a name for the query.

Description: Type a description for the query.

Table Name: Click the drop down arrow to select the table the query applies to.

Query Type: Click the drop down arrow to select the type of query. You can select from predefined queries that come with O'Neil Stratus, standard queries that have been created, or query templates, which are quick queries that have been created.

Query Code: Click the drop down arrow to select the actual query. The available choices are based on the selection made in the Query Type field.

Query Text: Query text appears automatically based on the query selected.

When you have completed all fields, click **Add** to add the query to the group.

When you have added a query to the group, the fields at the bottom of the **Grid Query Group Add** dialog box are automatically populated with the data related to the query.

Grid Query Group Add

Group Name	<input type="text" value="Container Queries"/>			
Description	<input type="text" value="This group contains all container related queries"/>			
Queries	<table border="1"> <thead> <tr> <th>Name</th> </tr> </thead> <tbody> <tr style="background-color: #ADD8E6;"> <td>Containers Account</td> </tr> <tr> <td> </td> </tr> </tbody> </table> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> Add Edit Delete </div>	Name	Containers Account	
Name				
Containers Account				
Query Description	A list of containers by level 1 account code			
Table Name	Container			
Query Type	Query Template			
Query Code	CA			
Query Text	Container^Level1AccountCode = "?Account No."			

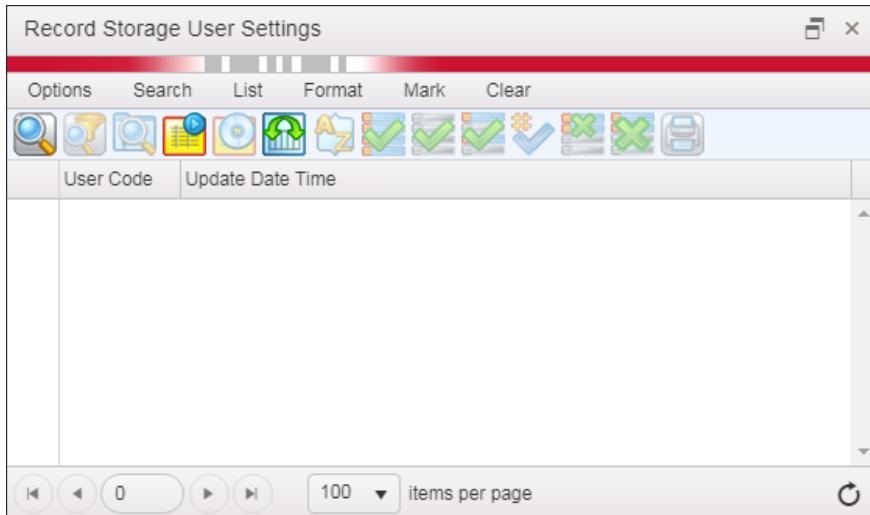
Add Cancel

Continue adding any additional queries you want to include in this group. When you are finished, click **Add** and the group is added to the **Grid Query Group** grid. Once the groups are created, they can be assigned to users with the **User Settings** menu option.

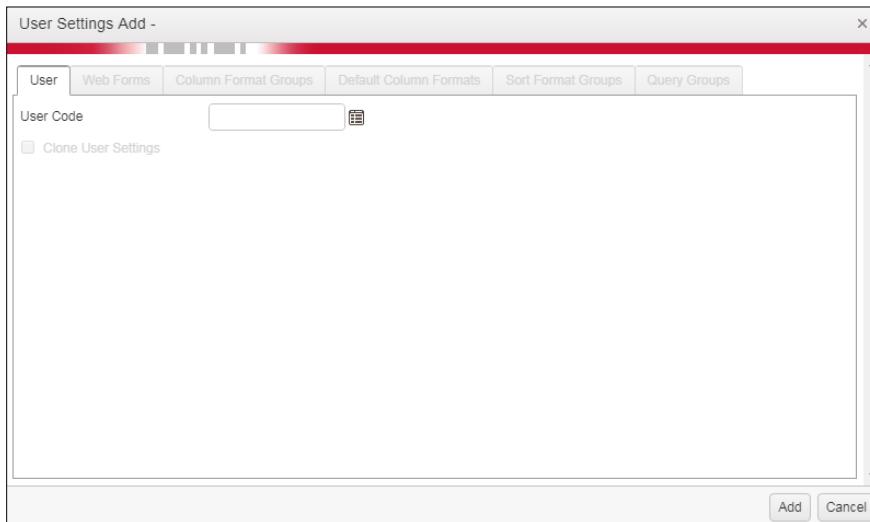
User Settings

Once you have set up all your forms and your column, sort, and query groups, you can assign them to users.

From the **Administration** menu, select **Web Setup**, and then **User Settings**.



To assign settings for a user, right click anywhere in the grid and select **Add**.



User

Click the grid picker next to the User Code field to select a user. Next, you can go through each of the other tabs and assign settings for this user.

If you prefer to clone all settings for this user from another user, select the Clone User Settings check box. The remaining tabs are removed and a Clone From User field appears.

User Settings Add - ERICA

User Web Forms Column Format Groups Default Column Formats

User Code: ERICA

Clone User Settings

Clone From User Code: CAROL

Click the grid picker to select the user to clone from and then click **Add** to save.

If you do not want to clone this user, continue by selecting the tabs along the top of the dialog.

Web Forms

Under the Web Forms tab, you can select the forms you want to assign to this user. Users only have access to forms that have been assigned to them. If no custom forms have been assigned to a user, they still have access to the default forms that come with the system, or any form that has the Is Default field set to Yes. These forms cannot be removed from the list using the **Remove** button. To remove the form from this list, you need to change the Is Default setting to No (in the **Custom Data Entry Form** grid). Additional forms can be added to the grid.

NOTE: If the system default forms that come with the system are deleted and no new default forms are created, the web user will not have access to an action unless a form is assigned to them here.

Form	Item Type	Form Type	Default	Std Default	Quick Default	Std Add	Quick Add
RSWeb.NET Container Add Intermediate	Container	Add	<input type="checkbox"/>				
RSWeb.NET Container Edit Intermediate	Container	Edit	<input type="checkbox"/>				
RSWeb.NET Container GlobalEdit	Container	Global Edit	<input type="checkbox"/>				
RSWeb.NET Filefolder Add Intermediate	Filefolder	Add	<input type="checkbox"/>				
RSWeb.NET Filefolder Edit Intermediate	Filefolder	Edit	<input type="checkbox"/>				
RSWeb.NET Filefolder GlobalEdit	Filefolder	Global Edit	<input type="checkbox"/>				
RSWeb.NET TAPE Add Intermediate	Tape	Add	<input type="checkbox"/>				
RSWeb.NET TAPE Edit Intermediate	Tape	Edit	<input type="checkbox"/>				
RSWeb.NET Tape GlobalEdit	Tape	Global Edit	<input type="checkbox"/>				

Remove Choose Add Cancel

To select forms for the user, click **Choose**. A list of the existing forms appears.

Custom Data Entry Form						
	Description	Form Type	For Add	For Edit	For Global Edit	Is Default
1	RSWeb.NET Container Add Quick	Container	Yes	No	No	No
2	RSWeb.NET Container GlobalEdit	Container	No	No	Yes	Yes
3	RSWeb.NET Container Edit Quick	Container	No	Yes	No	No
4	RSWeb.NET Container Add Intermediate	Container	Yes	No	No	Yes
5	RSWeb.NET Container Add Complete	Container	Yes	No	No	No
6	RSWeb.NET Container Edit Intermediate	Container	No	Yes	No	Yes
7	RSWeb.NET Container Edit Complete	Container	No	Yes	No	No
8	RSWeb.NET Filefolder Edit Quick	Filefolder	No	Yes	No	No
9	RSWeb.NET Filefolder Edit Intermediate	Filefolder	No	Yes	No	Yes
10	RSWeb.NET Filefolder Edit Complete	Filefolder	No	Yes	No	No

1 - 10 of 51 items

Right click on the form you want to assign to the user and select **OK**. The forms appear in the dialog.

To make a form the default, select the Default check box. The Std Default and Quick Default check boxes are used to set a form as the default for standard or quick adds. An asterisk appears next to the field to indicate it is the default.

NOTE: A user default set here overrides any system defaults. Any defaults you set here are for this user only. They do not become system defaults.

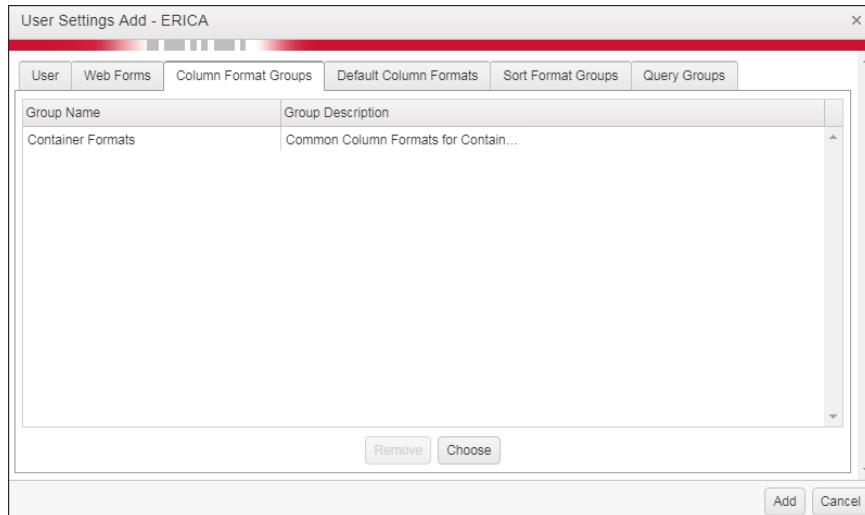
If there is no system default form, and you only assign one form to the user without selecting it as a user default form, that form displays by default (even though it was not explicitly designated as such). If there is no system default form and you assign several forms without selecting a user default form, the system will randomly select a form to display by default.

The Std Add and Quick Add check boxes allow you to select whether a particular form is to be used for standard adds or quick adds. At this time, the standard and quick add feature only applies to Filefolder forms. It may be expanded to Container and Tape forms in a future release.

When you are finished, you can select another tab, or click **Add** if you are finished assigning settings.

Column Format Groups

Under the Column Format Groups tab, you can select the column format groups for the user. The column format group determines what column formats are available to the user when they open a grid.



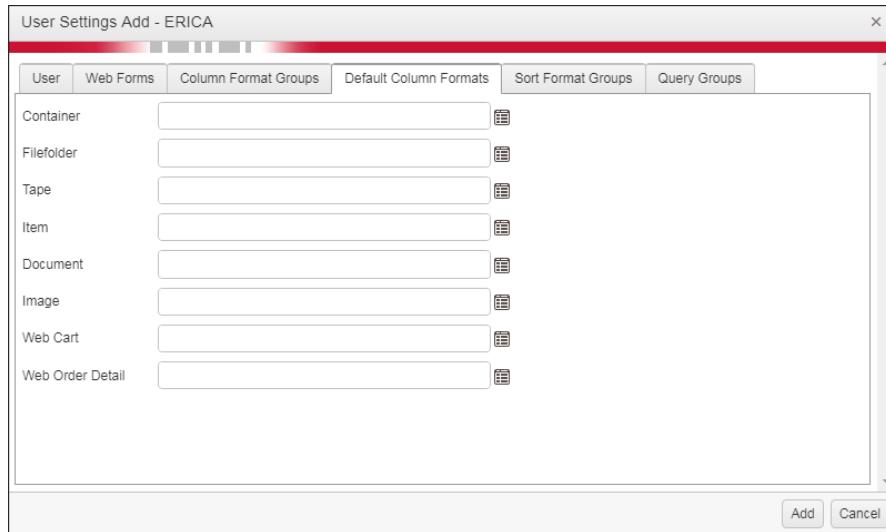
To select a column group for the user, click **Choose**. A list of the existing column format groups appears.

Grid Column Format Group				
	Group Name	Group Description	Update Us...	Update Date Tim
1	Management Columns	Columns requested by management	ADMIN	8/11/2005 7:49 A
2	Staff Columns	Columns requested for staff viewing	ADMIN	8/11/2005 7:49 A
3	Container Formats	Common Column Formats for Containers	ADMIN	6/30/2006 9:21 A
4	Filefolder Formats	Common Column Formats for Filefolders	ADMIN	6/30/2006 9:21 A
5	Tape Formats	Common Column Formats for Tapes	ADMIN	6/30/2006 9:21 A
6	Web Order Formats	Common Column Formats for Web Orders	ADMIN	6/30/2006 9:21 A
7	Web Cart Formats	Common Column Formats for Web Cart	ADMIN	6/30/2006 9:21 A
8	Item Formats	Common Column Formats for Items	ADMIN	11/27/2018 5:49

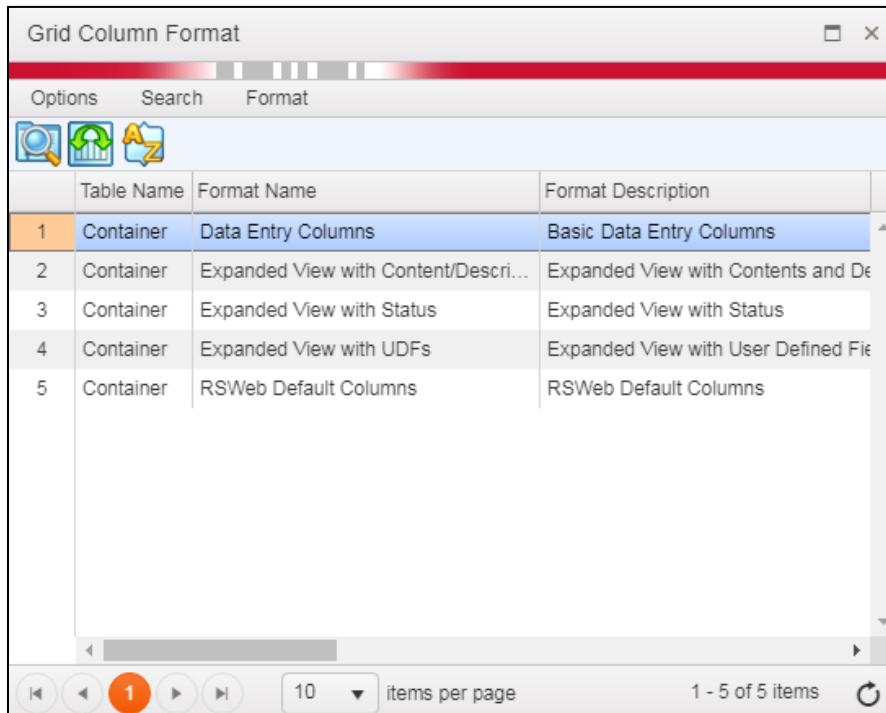
Right click on the column format group you want to assign to this user and select **OK**. The group is added to the user's settings. You can assign more than one group to a user. When you are finished, you can select another tab or click **Add** if you are finished assigning settings.

Default Column Formats

Under the Default Column Formats tab, you can select the default column format for the user. The default column format is what displays automatically when the user opens the grid. If you assign additional formats the user can always switch to another one if they choose.



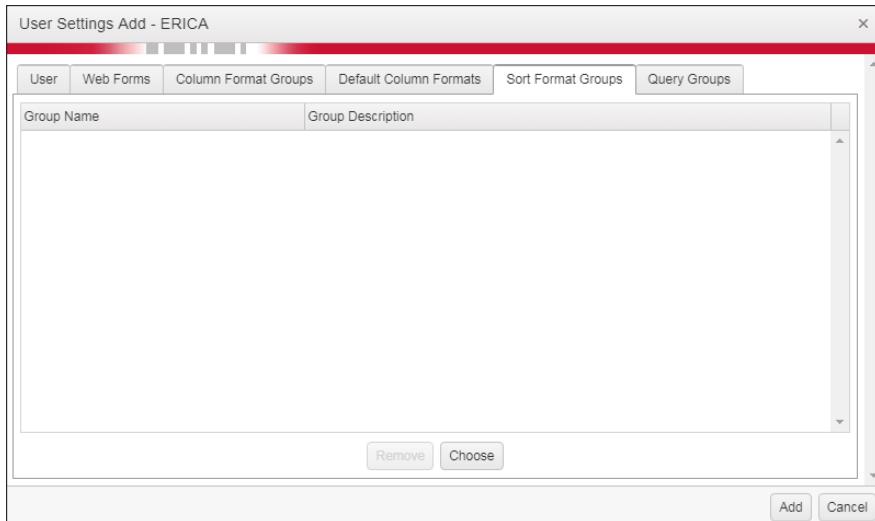
Click the grid picker next to the Container field to select the default column format for the Container grid. A list of the existing Column Formats appears.



Right click on the default column format you want to assign to this user and select **OK**. The format is added to the user's settings. Continue for the remaining fields. When you are finished, you can select another tab or click **Add** if you are finished assigning settings.

Sort Format Groups

Under the Sort Format Groups tab, you can select the sort format groups for the user. The sort format group determines what sort formats are available to the user when they open a grid.



To select a sort group for the user, click **Choose**. A list of the existing sort format groups appears.

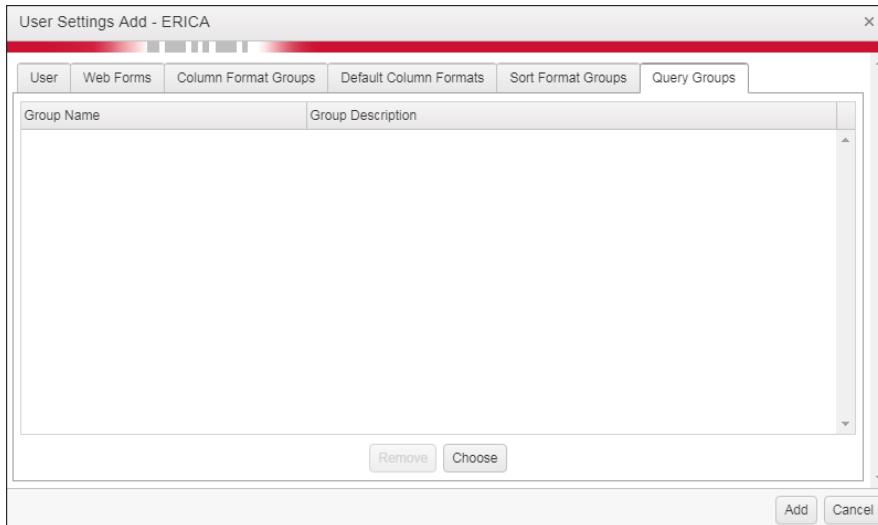
Grid Sort Format Group				
	Group Name	Group Description	Update Us...	Update
1	Management Sort	Sort order requested by management	ADMIN	8/11/21
2	Staff Sort	Sort order requested for staff viewing	ADMIN	8/11/21
3	Container Sorts	Common Sorts for Containers	ADMIN	6/30/21
4	Filefolder Sorts	Common Sorts for Filefolders	ADMIN	6/30/21
5	Tape Sorts	Common Sorts for Tapes	ADMIN	6/30/21
6	Web Cart Sorts	Common Sorts for Web Cart	ADMIN	6/30/21
7	Web Order Sorts	Common Sorts for Web Orders	ADMIN	6/30/21
8	Item Sorts	Common Sorts for Items	ADMIN	11/27/21

Buttons: Back, Forward, Page Number (1), Items per page (10), Page Range (1 - 8 of 8 items), Refresh

Right click on the sort format group you want to assign to this user and select **OK**. The group is added to the user's settings. You can assign more than one group to a user. When you are finished, you can select another tab or click **Add** if you are finished assigning settings.

Query Groups

Under the Query Groups tab, you can select the query groups for the user. The query group determines what queries are available to the user when they open a grid.



To select a query group for the user, click **Choose**. A list of the existing query groups appears.

Grid Query Group				
	Group Name	Group Description	Update Us...	Update Date Tim
1	Container Queries	This group contains all container related q...	ADMIN	8/10/2005 3:17 F
2	Group 1	Common Queries	ADMIN	10/22/2008 9:46
3	~Common Container	Common Container Queries	ADMIN	6/30/2006 9:21 A
4	~Common Filefolder	Common Filefolder Queries	ADMIN	6/30/2006 9:21 A
5	~Common Tape	Common Tape Queries	ADMIN	6/30/2006 9:21 A
6	web user		ADMIN	3/23/2009 1:02 F
7	Web Admin Queries		ADMIN	3/4/2019 2:07 PI

Right click on the query group you want to assign to this user and click **OK**. The group is added to the user's settings. You can assign more than one group to a user. When you are finished, you can select another tab or click **Add** if you are finished assigning settings.

Clone Web User Settings

Once you have assigned settings to a user, you have the ability to clone the settings for multiple RSWeb.NET or O'Neil Order users. From the Administration menu, select **Web Setup** and then **User Settings**.

Record Storage User Settings		
Options Search List Format Mark Clear 		
User Code	Update Date Time	
1	CURTIS	5/17/2018 1:40 PM
2	LYDIA	6/5/2006 2:15 PM
3	CAROL	8/11/2005 7:47 AM
4	BEN	3/5/2008 3:29 PM
5	MARY	3/18/2008 8:57 AM
6	ED	10/28/2009 10:24 AM

 1

 100
 items per page

Mark the users you want to clone user settings to, and from the **Options** menu select **Clone User Settings**.

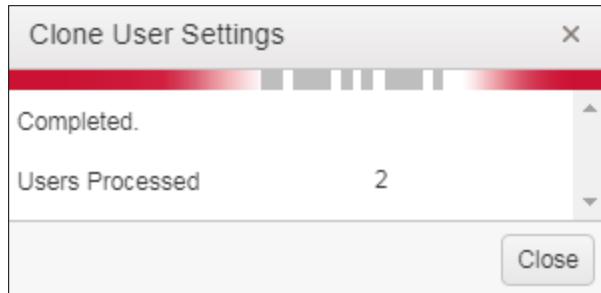
Clone User Information

Clone All	<input type="text"/>	
Clone From User		
Web Forms	<input type="text"/>	
Column Format Groups	<input type="text"/>	
Default Column Formats	<input type="text"/>	
Sort Format Groups	<input type="text"/>	
Query Groups	<input type="text"/>	

Click the grid picker next to each field to select a user you want to clone information from. If you select a user for the Clone All field, the remaining fields are automatically populated with that user. You can then override the individual fields by entering another user or clearing it out. If, after entering a user in the Clone All field, you wish to reset all the other fields to blank, you can clear the field and it will clear the rest of the fields.

NOTE: You can only clone from users that have been added to the **User Settings** grid.

Click **OK** to begin the cloning process. When finished, a message appears informing you of the number of users successfully cloned.

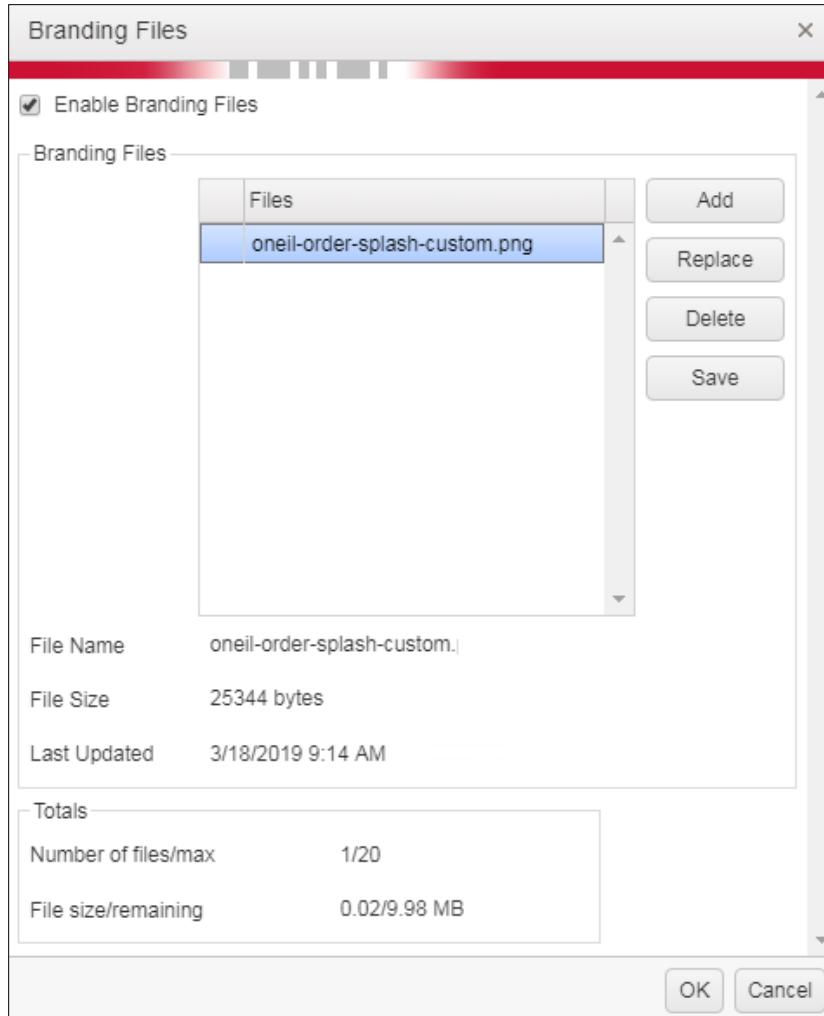


Click **Close** to return to the **User Settings** grid.

O'Neil Order Branding Files

The branding files needed to customize the look and feel of O'Neil Order can be uploaded and stored in the O'Neil Stratus database.

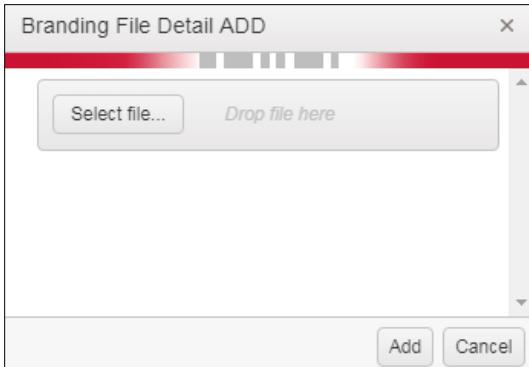
From the **Administration** menu, select **Web Setup** and then **O'Neil Order Branding Files**.



Enable Branding Files: Select this check box to enable the use of the branding files. To discontinue using the custom branding files, clear the check box. The files remain in the database but are not used. If you want to use the same files in the future, select the check box again.

Branding Files:

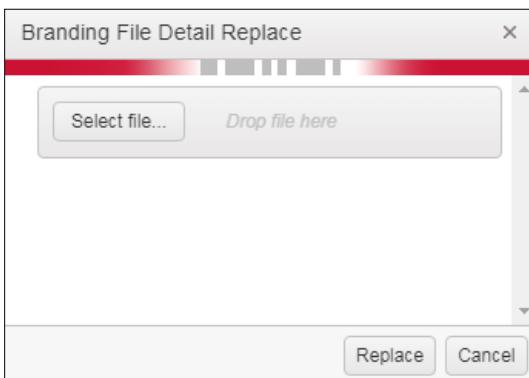
Add: To add a branding file, click **Add** and select the file you want.



It is added to the file text box. The following file extensions are supported:

- Image Files (*.bmp, *.gif, *.ico, *.ief, *.jpe, *.jpg, *.jpeg, *.jfif, *.png, *.svg)
- Cascading Style Sheet Files (*.css)

Replace: To replace a file you have already added, click on it to highlight it and then click **Replace**. Select the file you want to replace it with.



The file is replaced in the file text box.

Delete: To delete a file you have already added, click on it to highlight it and then click **Delete**. The file is deleted from the file text box.

Save: To save a file in the file text box to your computer, click on it to highlight it and then click **Save**.

File Name: Displays the name of the file highlighted in the file text box. This field is read-only.

File Size: Displays the size of the file highlighted in the file text box. This field is read-only.

Last Updated: Displays the date the file was last updated. This field is read-only.

Totals: Displays the number of files that have been added, as well as the maximum allowed. Also displays the total size of the files that have been added and how much space is remaining.

When you have finished, click **OK** to save your changes and close the **Branding Files** dialog box.

Sample Files

A sample placeholder rm-styles-custom.css file is available in the O'Neil Stratus Downloads section on the O'Neil Software website, www.oneilsoftware.com.

Example - Change bar along top and image at top left

To customize the bar along the top of the screen as well as the image on the navigation button, create a custom rm-styles-custom.css that includes the following:

```
#barcode
{
    /* change the color of the whole bar at the top */
    background-color: #22375A;
}

/* set the "navigate" button to be a custom version */
#navigate.oneilorder-std-nav
{
    background-image: url('../images/custom/logonimage.png');
}
```

NOTE: The optimal size for the image used on the navigation button is 73 x 24 pixels.



Example - Replace splash image displayed after login

To customize the splash image that is displayed after logging in, create a custom rm-styles-custom.css that includes the following:

```
/*override the default splash image */
#main.oneil-order-splash
{
    background-image: url('../images/custom/logonimagesplash.png');
```

NOTE: The optimal size for the splash image is 1000 x 408 pixels.



RSWIN.INI Settings

Three RSWIN.INI settings are available in the RSWeb section to support the branding files feature.

- Branding Files.MaxFilesCount:

- Branding Files.MaxValue
- Branding Files.MaxTotalFileSize

See the *RSWEB.INI* section for a description of each setting.

Function Access

The **Branding Files** menu option is only available if the following Function Access is set to Yes.

Function Access for CURTIS						
	Options	Search	Format	Mark	Clear	
1	Application	Menu	Grid	Item Type	Item	Access
1	RSADMIN	Options\Web Setup\O'Neil Order Branding Files	-----	Menu Item	-----	Yes

RSWEB.INI

RSWEB.INI settings allow you to change the way RSWeb.NET and O'Neil Order handle session timeouts, query settings and other options. The settings are accessed in Administration, from the **RSPIN.INI Config** dialog. The following options can be set.

NOTE: Most options are available in RSWeb.NET. Currently not all are available in O'Neil Order.

Branding Files Section

MaxFilesCount - (*O'Neil Order only*) sets the maximum number of branding files. If no entry is made, the default is 20 files. The maximum allowed is 40 files.

MaxFileSize - (*O'Neil Order only*) sets the maximum size (in megabytes) of any branding file. If no entry is made, the default is 1 megabyte. The maximum allowed is 10 megabytes.

MaxTotalFileSize - (*O'Neil Order only*) sets the maximum total size (in megabytes) of all branding files. If no entry is made, the default is 10 megabytes. The maximum allowed is 20 megabytes.

Options Section

CreateReport - (*RSWeb.NET only*) allows you to create a Web Order Report instantly or at a scheduled time. The default is to create it at a scheduled time.

MaxAggregate – (*RSWeb.NET, O'Neil Order*) sets the maximum number of unitemized pickups that can be placed on a web order. The default is 2000.

RememberMe - (*RSWeb.NET only*) displays a Remember Me check box on the login page. This allows the user name to be remembered the next time the user goes to the login page. By default it is turned off. When the option is first set to Yes, the RSWeb.NET login screen shows the Remember Me check box; however, it is not selected. The User Name input field is blank. If the user selects the check box, the User Name is remembered the next time they open the login screen and the Remember Me option remains selected.

SaveUserLog - (*RSWeb.NET, O'Neil Order*) turns on/off the **User Log** grid which contains information on every Web user that logs in. By default this feature is turned off. To turn on it must be set to Yes.

ViewItemActivity – (*RSWeb.NET only*) allows you to view item activity. By default it is turned off.

Query Section

MaxOrderDetailRows - (*RSWeb.NET only*) indicates the maximum number of orders that display in the **Order Status** grid. If no entry is made, the default number of rows is 500. The setting can be any non-zero number.

MaxOrderExpressContainees - (*RSWeb.NET only*) indicates the maximum number of containees that can be displayed in a container in the Order Express Search results. The default is 50 and the maximum is 1000.

NOTE: If the MaxOrderExpressContainees option is set to a large number, the performance of the **Order Express Result** grid may be affected if there is a large number of containers and containees in the results.

MaxOrderExpressRows - (*RSWeb.NET only*) indicates the maximum number of Order Express Search results that can be displayed from a query. The default number of rows is 500.

MaxRangeAllowed - (*RSWeb.NET, O'Neil Order*) limits the range size when querying for orders in the **Search Orders** screen. This setting affects the Batch Order Number Range and Tracking Number Range fields. The default setting is 2000, and the maximum is 10,000.

MaxRows - (*RSWeb.NET only*) indicates the maximum number of results, from a query, that can be displayed. The default number of rows is 500. The setting can be any non-zero number.

MaxUploadRows - (*RSWeb.NET only*) indicates the maximum number of results from a query in a file upload. The results display in the **Cart**. If no entry is made, the default number of rows is 2000. The setting can be any non-zero number.

TimeOut - (*RSWeb.NET only*) determines the amount of time that a query runs before stopping. If a query times out, no results are returned and the user is notified that the query timed out. By default, this has been set to 60 seconds. The setting can be any non-zero number.

Rotation Section

CheckItemsInSet - (*RSWeb.NET only*) automatically checks items put onto workorders to make sure all items in the same set are added also. The default setting is No (do not check).

Session Section

ItemVerify - (*RSWeb.NET, O'Neil Order*) turns on the Item Verification feature. This feature verifies if an item is available for order before the order is submitted. If an item is not available for order, an exception message displays the item type, item code, current status and status date. By default this feature is turned off.

ItemVerifyDetailed - (*RSWeb.NET, O'Neil Order*) is only relevant if ItemVerify is enabled. This gives the web user a more detailed message if an item they requested is not available. An exception message displays the same information as ItemVerify does, but also includes the workorder number and requestor name. By default this feature is turned off.

ItemVerify	ItemVerifyDetailed	Example Message
Off	Off/On	Create Order: Order is created successfully.
Off	Off/On	Create Workorder: Container 97026650 (1753) Out on Apr 20, 2009 WO# 00000064 Req: Ed
On	Off	Create Order: Container 97026650 (1753) Out on Apr 20, 2009
On	Off	Create Workorder: Container 97026650 (1753) Out on Apr 20, 2009 WO# 00000064 Req: Ed
On	On	Create Order: Container 97026650 (1753) Out on Apr 20, 2009 WO# 00000064 Req: Ed

On	On	Create Workorder: Container 97026650 (1753) Out on Apr 20, 2009 WO# 00000064 Req: Ed
----	----	--

- The item is always verified when a Workorder is placed, therefore the ItemVerify setting applies only to Web Orders.
- If ItemVerify setting is turned off, the item is not verified and the web user can place a Web Order for an item that has a status of OUT.
- For Workorders, WO# and Req are always part of the verification message.
- For Web Orders, WO# and Req are part of the verification message only if both ItemVerify and ItemVerifyDetailed are turned on.
- If no Workorder is placed that caused the item status to change to OUT the WO# and Req are not displayed whether ItemVerifyDetailed is turned on or not.

LicenseTimeOut - (*RSWeb.NET only*) instructs RSWeb.NET when to log out a web user from a Web Session. This is applicable when the web user has not logged out correctly or has been inactive for a specified time period. When this timeout occurs, the web user is forced to log in again and is placed back at the home screen. By default, this has been set to 1200 seconds (20 minutes). The setting can be any non-zero number less than 32,768.

To modify, enter the time amount in seconds and the update will take place upon closing and re-opening of an RSWeb.NET session.

Client User Guide

A separate Client User Guide for both RSWeb.NET and O'Neil Order is available for you to give to your clients.

Licensing

Cloud Based Licensing (CBL)

Your O'Neil Stratus license, allows you to open the system, to enter up to a specified number of items, and to allow a specific number of RSMobile users at a time. Should you decide to upgrade the number of items or users on your system, you will need to contact your O'Neil sales representative. Your license can then be updated for you.

When your system approaches a cut-off, either with a date or with the quantity of items on the system, a warning appears on the screen when you log in. When this happens, contact O'Neil Technical Support right away.

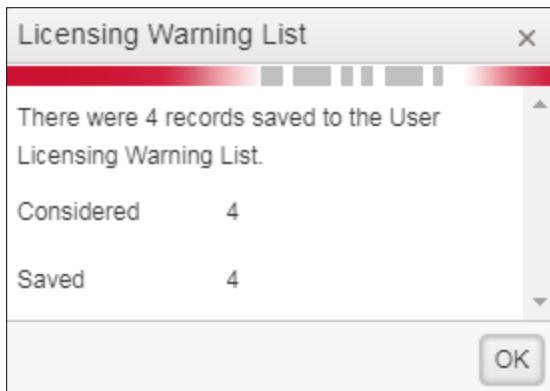
With Cloud Based Licensing, information can be sent directly to and from O'Neil via the internet based cloud. When your system limits change for any reason, O'Neil will reset the license information and it will automatically be updated within 15 minutes.

Licensing Warnings

License Warning List

This menu option allows you to create a list identifying users you want to be notified when there is a licensing issue of some type.

From the **Administration** menu, **User** submenu, select **Users**. Load the users you want to be notified into the grid. From the **Options** menu, select **Licensing Warning List**, and then **Save**. The following prompt appears.



Click **OK** and the list is saved.

NOTE: Only one Licensing Warning List can be saved. If you try to save an additional list, you receive a prompt asking if you want to overwrite the existing list.

When there is a problem with licensing information, each of the users on the list receives a warning every time they log in to O'Neil Stratus until the issue is resolved. Once the issue is resolved, the warnings will stop.

NOTE: If no Licensing Warning List is created, all RS-SQL standard users receive the warning messages.

Use the **Load** and **Delete** menu options to load or delete an existing list.

Temporary Licensing Mode

When your license is close to expiring O'Neil Stratus will go into temporary licensing mode. At that point you will have a seven day (168 hours) grace period to contact O'Neil and resolve the issue.

During the grace period, the following applies when a user logs in:

- If a Licensing Warning List is established and there are more than 16 hours left before it expires, all the users on the list are warned.
- If a Licensing Warning List is not established, all standard users are warned.
- If there is less than 16 hours left for the grace period, the Licensing Warning List is ignored and all standard users are warned.

If the licensing issue is not resolved, after the seven day grace period has passed, users receive a message that the license has expired and they can no longer log in.

Capacity Exceeded

When you are close to reaching the maximum number of items for your system, you receive a warning. You can still log in to O'Neil Stratus at that time. However, once you exceed the maximum, you will not be able to log in. You will need to contact O'Neil Technical Support for assistance. This applies to Containers, Filefolders, Tapes, Images, and RSMobile Users.

License Warning Examples

One or more of the following licensing warnings may display after you successfully log in (if set up, only "License Warning List" users will be notified):

- Application expires within 45 days. Example:
Your license from O'Neil Software will expire in 40 days. After 08/31/2018 you will not be able to login. Please contact O'Neil Software.
- Application expires today. Example:
Application expires today. Contact O'Neil Software Customer Support.
- Containers, tapes, filefolders or images within 90% of the maximum. Example:
The current Container quantity is within 93.21 % of your authorized capacity.
Authorized Capacity: 1,000,000
Current Quantity: 932,100
You will not be able to login once your quantity of items exceeds your authorized capacity. Please contact your O'Neil Software, Inc., representative to increase your Container capacity.
- Containers, tapes, filefolders or images within 50 of the maximum. Example:
The current Container quantity is within 45 of your authorized capacity.
Authorized Capacity: 1,000,000

Current Quantity: 999,955

You will not be able to login once your quantity of items exceeds your authorized capacity. Please contact your O'Neil Software, Inc., representative to increase your Container capacity.

- The number of RSMobile licenses has been exceeded. Example:

The maximum number of RSMobile licenses has been exceeded.

Authorized Capacity: 42

Current Quantity: 43

RSMobile communication will not be allowed until this situation is corrected.

If you receive one of the following license warnings, you will not be allowed to log into O'Neil Stratus until the licensing issue is resolved:

- Application expired. Please contact O'Neil Software Customer Support.
- Maximum containers exceeded. Please contact O'Neil Software Customer Support.
- Maximum filefolders exceeded. Please contact O'Neil Software Customer Support.
- Maximum tapes exceeded. Please contact O'Neil Software Customer Support.

NOTE: The messages that display to the user are translatable based on the user attempting to log in.

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