Client User Guide

Williams Data Management

oneilOrder™

O'Neil Software, Inc.

January 2020

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Contents

Navigating oneilOrder

Overview

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

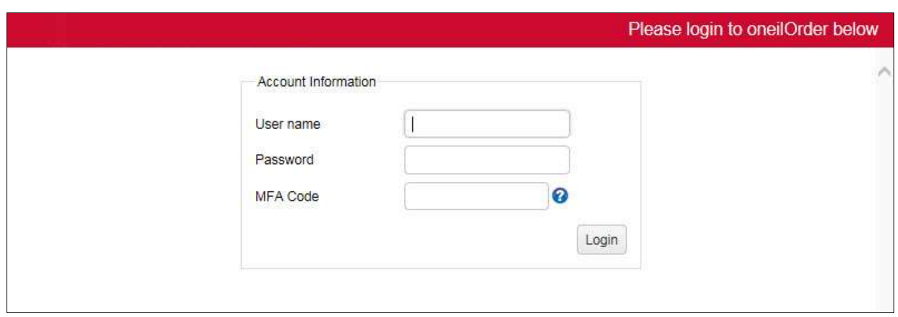
Through oneilOrder and your Internet connection, you can query the record center database, request pickups or deliveries, check the status of your orders, and update the information associated with your stored items. oneilOrder's modern interface provides full text search functionality, robust filtering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

Access oneilOrder

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

Log In

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



Enter your User Name and Password in the appropriate fields.

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

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

Google Authenticator

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

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

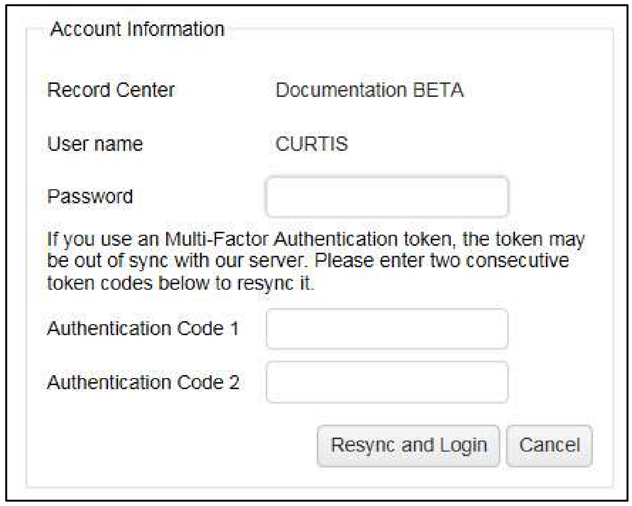
For this to work, a set-up operation has to be performed the first time you log in after enabling MFA. oneilOrder provides a shared secret key over a secure channel, which is to be stored by the Authenticator app. This secret key will be used for all future logins to oneilOrder.

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 oneilOrder Login screen. As long as the app is open, it will continue generating these codes, so if you mis-type one, you can wait 30 seconds for the next one to be generated. However, you must log in while the code is still showing. If you type in a code and wait too long before you log in, the login will fail.

Login

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

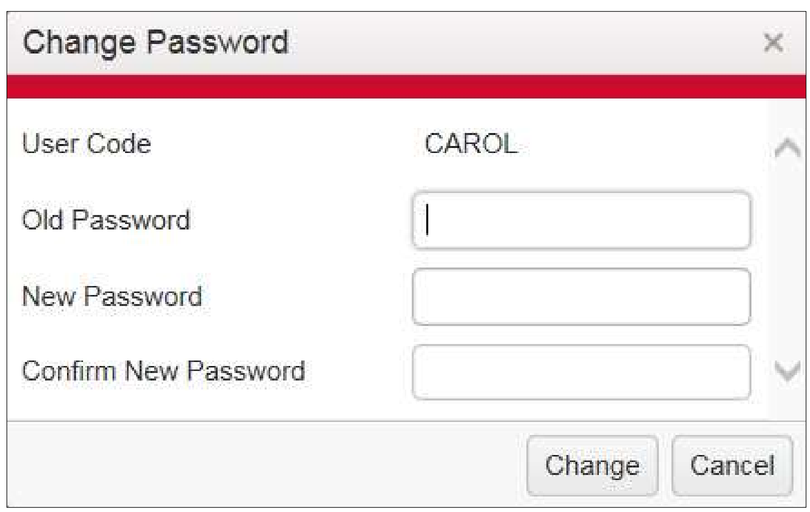


Enter your password and two consecutive Authentication Codes. Click **Resync and Login**.

Change Password

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

The **Change Password** dialog box appears.



Complete the fields and click **Change**.

Log Out

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

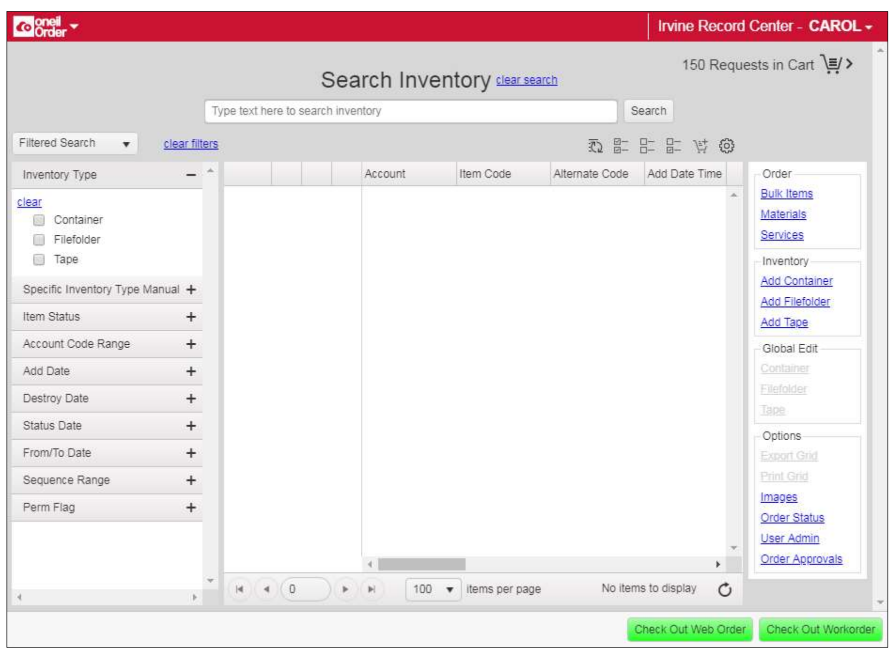
Time Out

oneilOrder has a built-in time out feature. After a certain period of inactivity, you will be logged out.

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

Grids

oneilOrder opens to the **Search Inventory** screen.



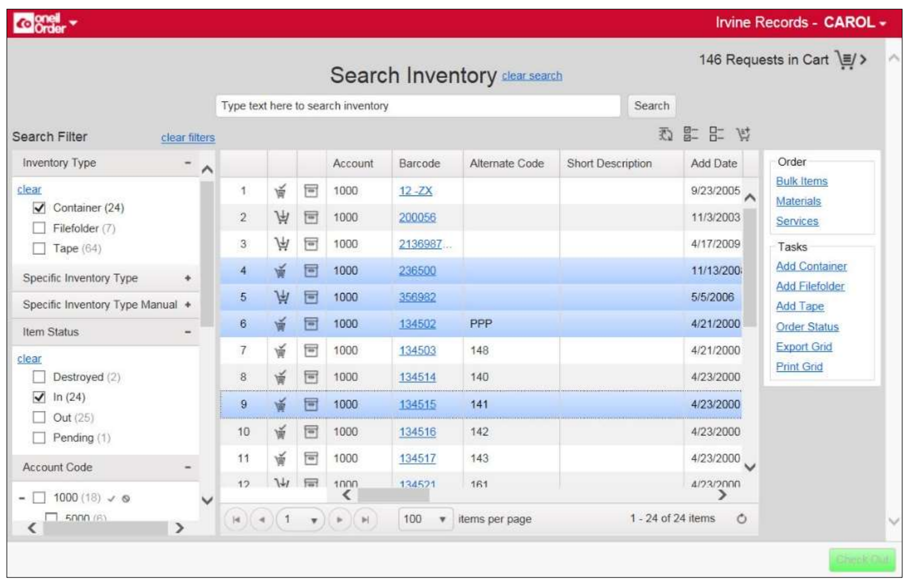
At the top of the screen is a search field. Search filters display on the left side of the screen. Links to specific grids display on the right side of the screen.

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

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

Select/Unselect Rows

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



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

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

Columns

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

Account ▲	Barcode ▼	Alternate Code
1000	F60153	
1000	996333	
1000	996326	
1000	996325	
1000	963236	
1000	569555	
1000	363333	
1000	134701	154
1000	134529	169
1000	134528	168

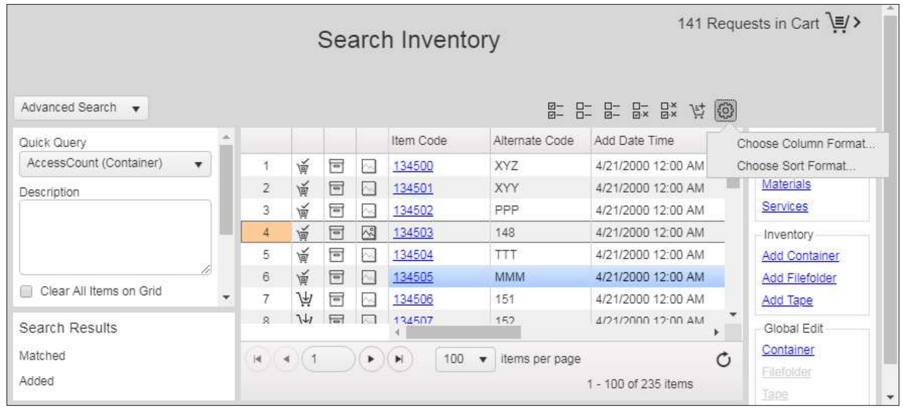
Columns cannot be removed from a grid; however, the order they appear in the grid can be changed. To move a column, click on the column heading and drag to the new location.

Alternate Code	Ac + Status	tatus	Short Description
	9/29/2000	In	
	5/17/2016	Pending	
	5/17/2016	Pending	
	5/17/2016	Pending	
	5/16/2016	Pending	
	5/17/2016	Pending	
	5/17/2016	Pending	
154	4/22/2000	In	

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

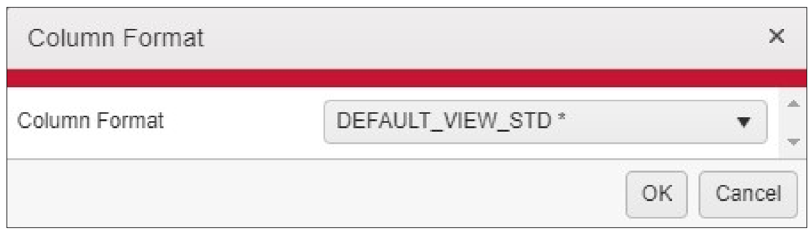
Column Format/Sort Format

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



Choose Column Format

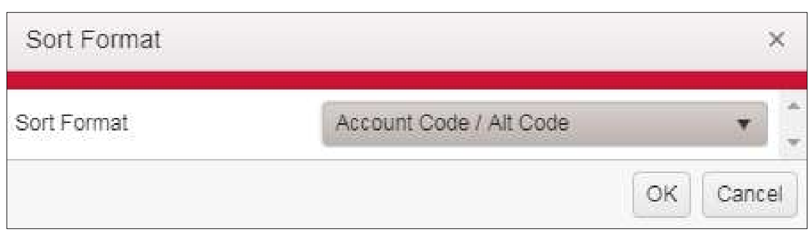
The Column Format determines which columns appear in the grid.



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

Choose Sort Format

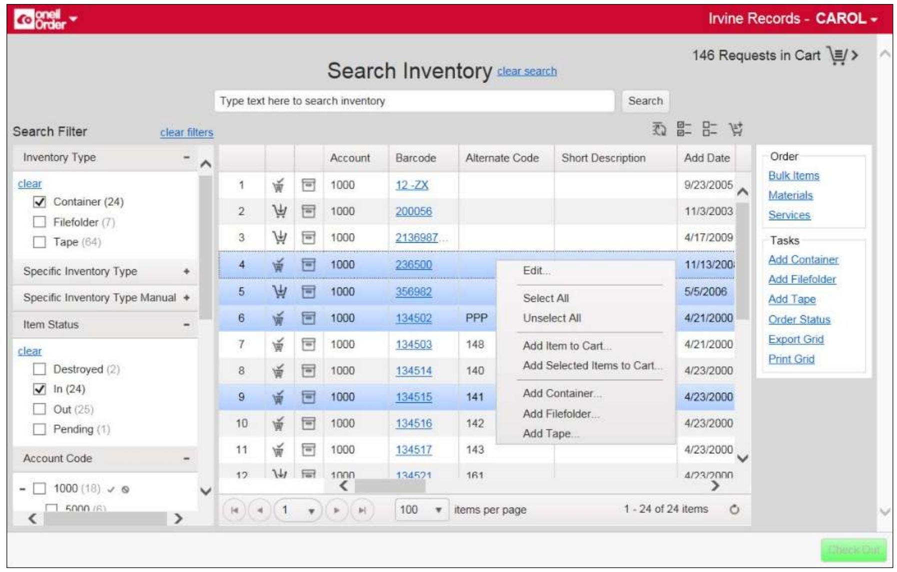
The Sort Format determines the order in which data is sorted in the grid.



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

Context Menu

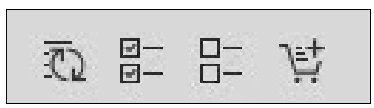
Right click on a row to bring up a context menu.



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

Icons

Each grid contains the following icons.



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

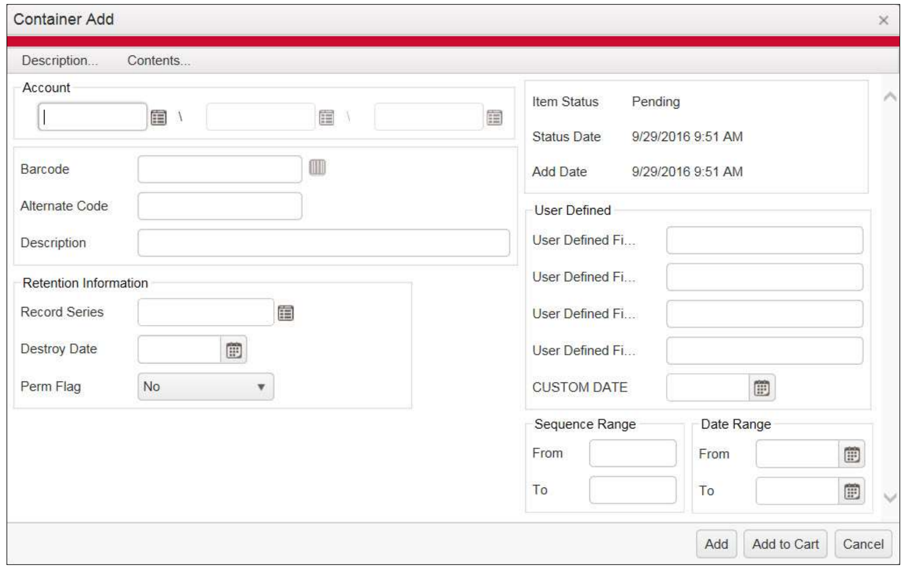
Select All: Selects all items that are displayed in the grid.

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

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

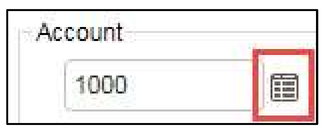
Dialog Boxes

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



Grid Picker

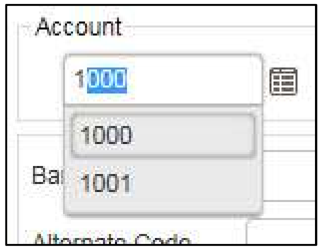
Some fields require an entry from pre-determined data. In this case a grid picker is available. For the field below, to bring up a list of available accounts, click the grid picker.



The **Account** grid appears.

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

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



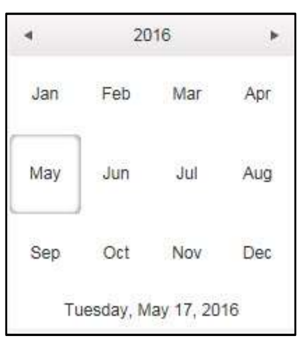
Date/Time Fields

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

Date Picker

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

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



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

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

Keys	Action
Left arrow	Highlights the previous day
Right arrow	Highlights the next day
Up arrow	Highlights the same day from the previous week
Down arrow	Highlights the same day from the next week
Ctrl + left arrow	Navigates to the previous month
Ctrl + right arrow	Navigates to the next month
Ctl + up arrow	Navigates to the next view
Ctrl + down arrow	Navigates to the previous view
Home	Highlights the first day of the month
End	Highlights the last day of the month
Enter	If in “month” view, selects the highlighted day. In other views, navigates to a lower view.

Date/Time Picker

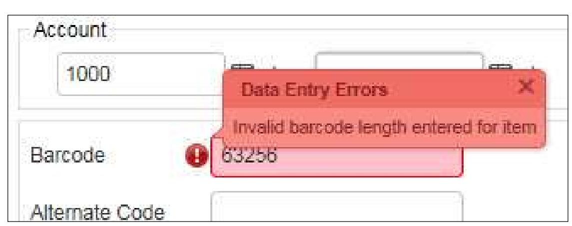
There is also a date/time picker that combines both date and time in the same field.

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

Errors/Warnings

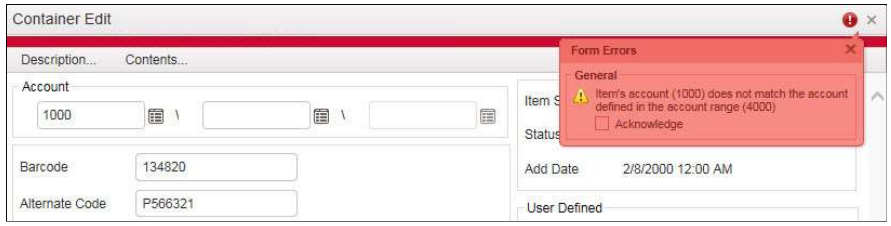
If an invalid entry is made in a field, the field is highlighted in red with an error/warning icon.

Click the icon to view the message.



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

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

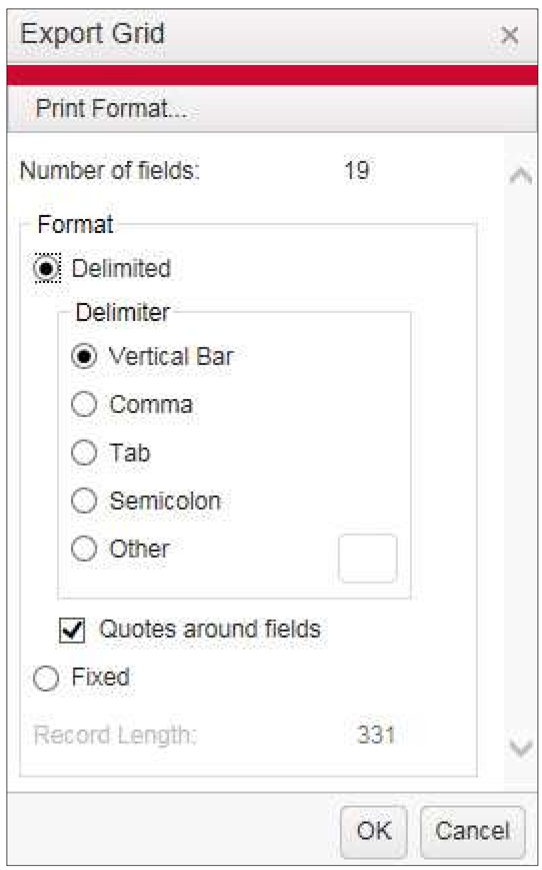


Errors need to be corrected. Warnings do not require action, they just need to be acknowledged. Select the check box to acknowledge the error. Click the **X** in the top right corner to close the message. You cannot save your change until the error has been corrected or the warning has been acknowledged.

Export Grid

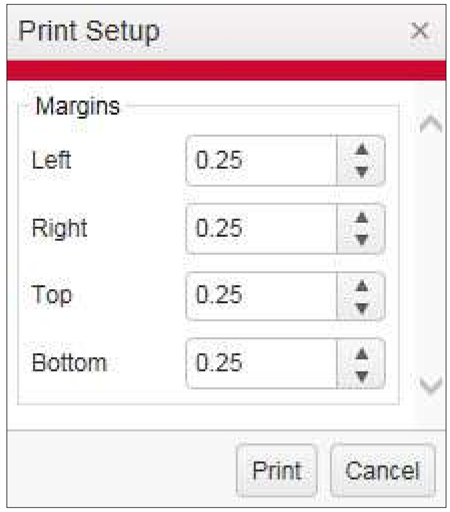
All grids in oneilOrder have an Export feature. This allows you to export data to a text file that can be viewed in other programs.

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



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

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



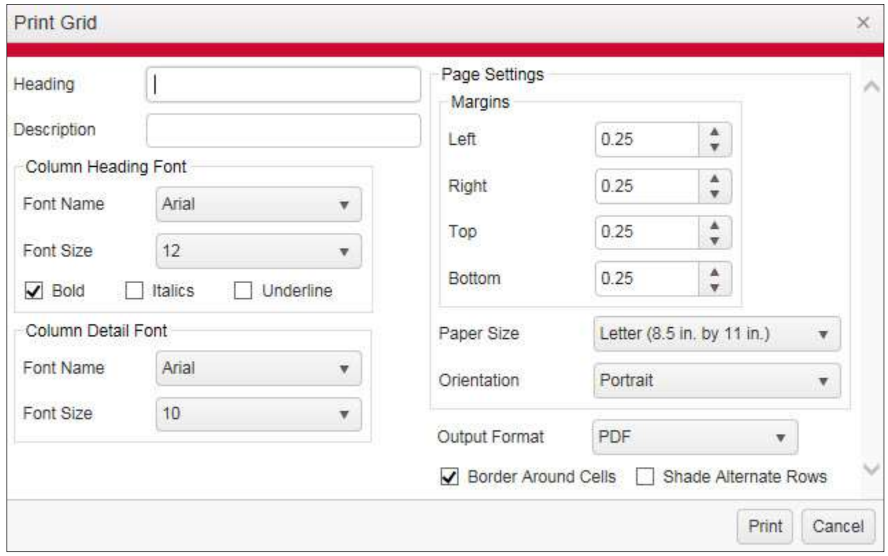
Adjust your margins as necessary and click **Print** to return to the **Export Grid** dialog box. Click **OK** to begin the export.

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

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

Print Grid

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



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

Column Heading Font

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

Column Detail Font

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

Page Settings

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

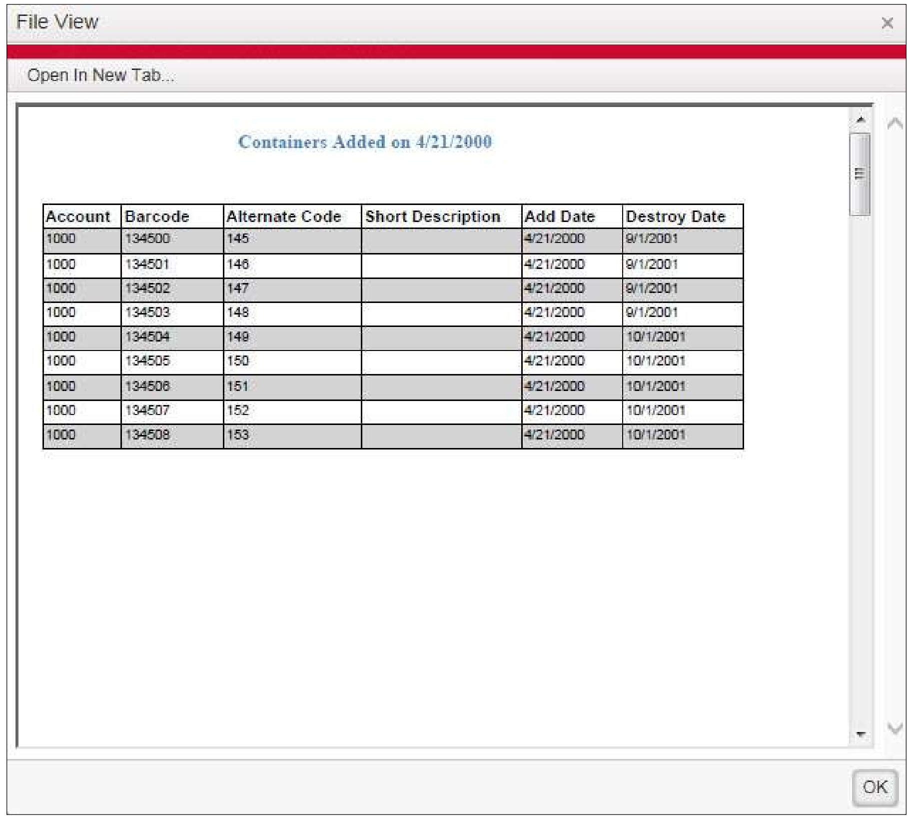
Next, select the Output Format. You can save the grid as a PDF, Microsoft Excel spreadsheet, or Microsoft Word document.

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

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

NOTE: When you print a grid, remember that only selected rows on the grid will print.

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



Containers Added on 4/21/2000

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

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

Inventory

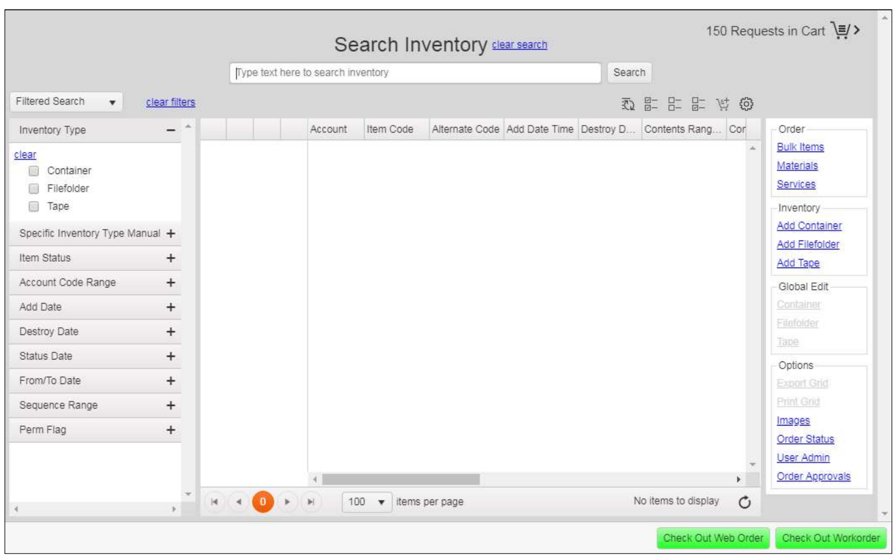
Introduction

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

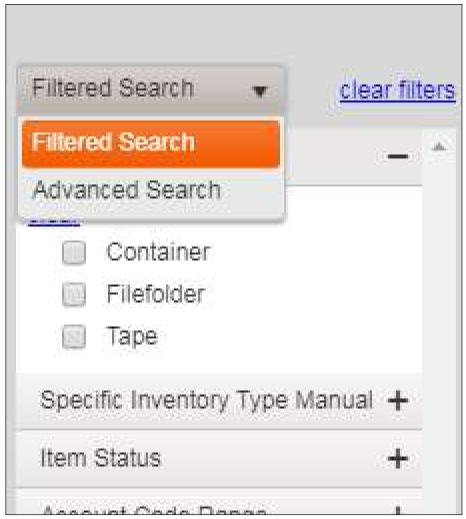
You can add new items at the click of a button, or search for all the existing items that you want to edit. The database at the record center will be searched, and the items that meet your criteria will be loaded onto your screen. Once the items are loaded, you can view and edit fields for an item, or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

Search Inventory

oneilOrder opens to the **Search Inventory** screen.



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



Filtered Search

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

Search Text Field

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

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

Columns Searched

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

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

- Long Description
- Item Code Alias
- Item Keyword

Supported Searches

Below are some examples of searches that are supported in oneilOrder.

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

Searches not Supported

The following searches are not supported.

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

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

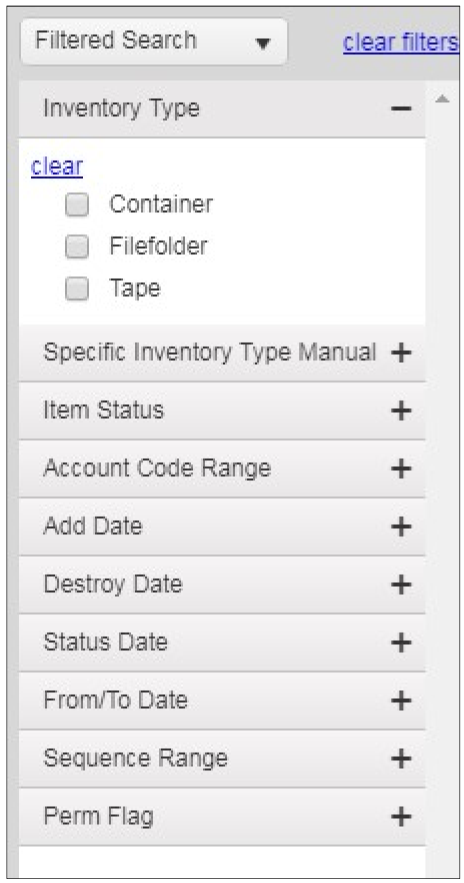
- Searching for individual numbers or characters. These are not indexed by SQL Server's Full Text Search. So searching for *A* will not match items with an "A" in them.
- Searching for one of 116 words that SQL Server's Full Text Search does not index because they are considered too commonly used. These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

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

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

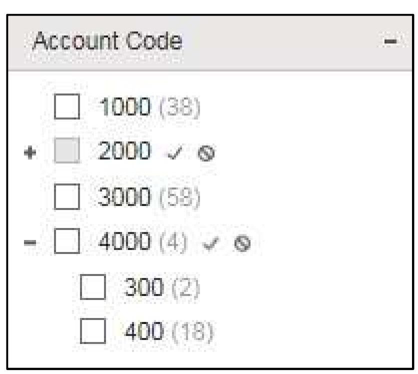
Search Filters

Search filters are used to narrow down your search.



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

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



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

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

Inventory Type

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

Specific Inventory Type

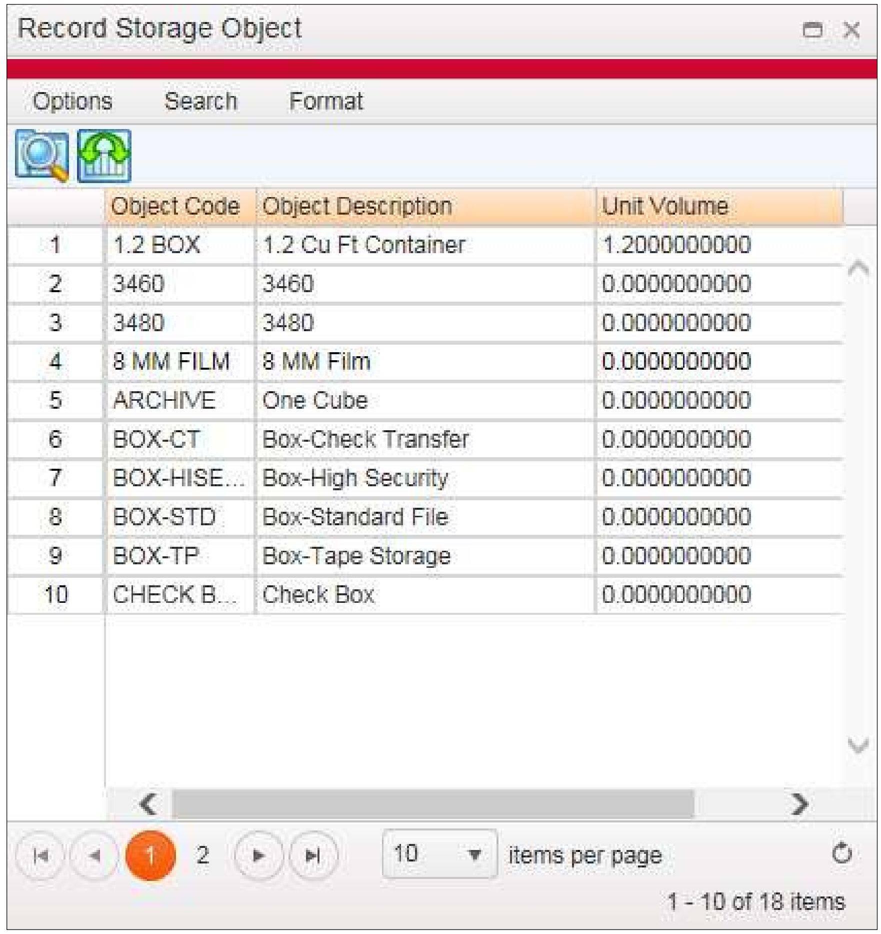
This filter displays all available sub-types of the Inventory Type selected. If Container is the only Inventory Type selected, then only Container sub-types will be displayed here.

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

Specific Inventory Type Manual

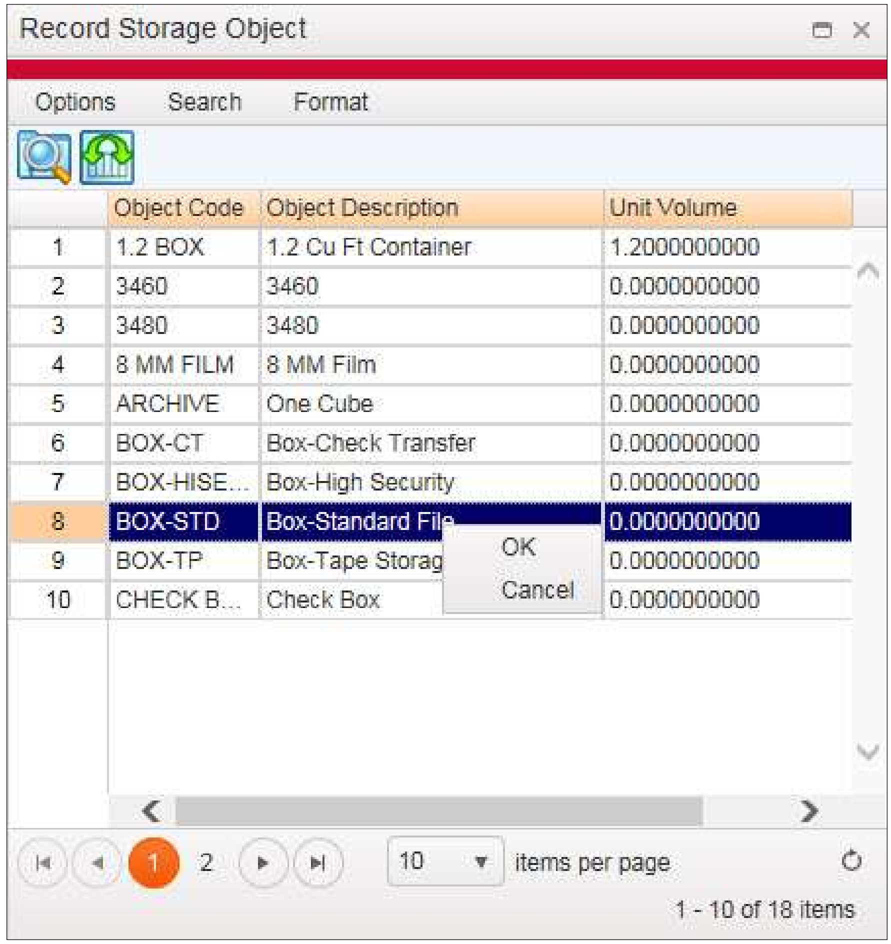
This filter lets you manually select the Specific Inventory Type you want.

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



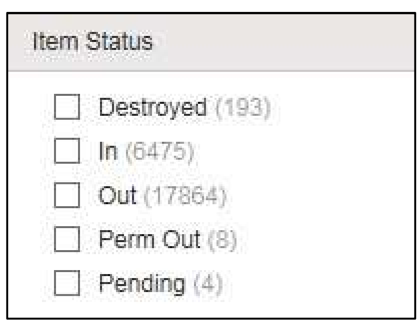
	Object Code	Object Description	Unit Volume
1	1.2 BOX	1.2 Cu Ft Container	1.2000000000
2	3460	3460	0.0000000000
3	3480	3480	0.0000000000
4	8 MM FILM	8 MM Film	0.0000000000
5	ARCHIVE	One Cube	0.0000000000
6	BOX-CT	Box-Check Transfer	0.0000000000
7	BOX-HISE...	Box-High Security	0.0000000000
8	BOX-STD	Box-Standard File	0.0000000000
9	BOX-TP	Box-Tape Storage	0.0000000000
10	CHECK B...	Check Box	0.0000000000

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



Item Status

Select from the available item statuses.



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

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

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

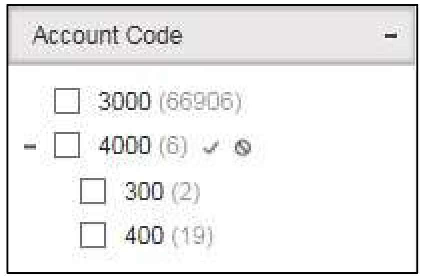
Perm Out: A status of Perm Out means the item was returned to the customer and will not be coming back to the record center.

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

Account Code

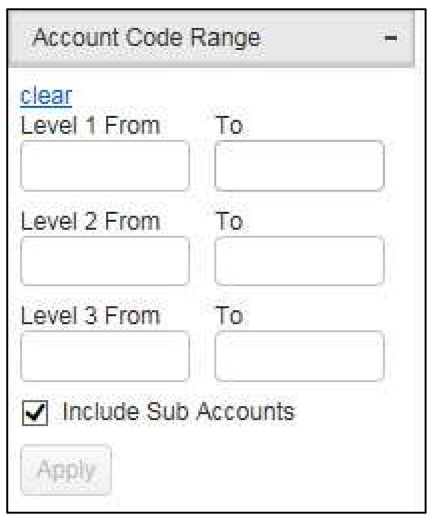
Select from the available accounts/sub accounts. Only accounts that you have access to are displayed.

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



Account Code Range

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

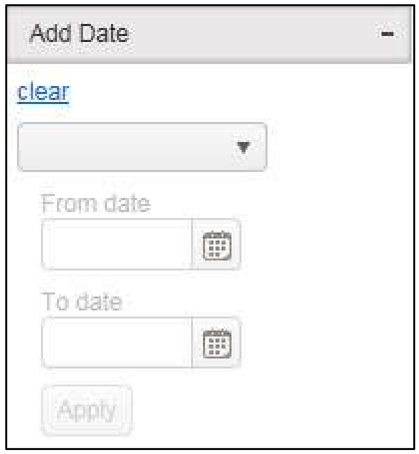


Select the *Include Sub Accounts* check box if you want to include all sub accounts for the account range you entered.

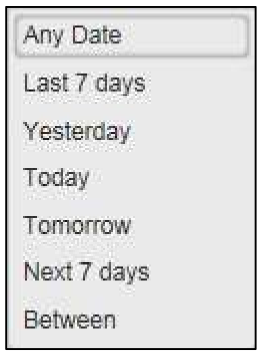
Click **Apply** to include the account code range in your search.

Add Date

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



Select from the available options.



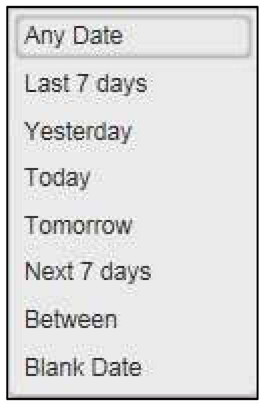
If you select Between, you will need to enter a From/To date. Type in a date, or click the grid picker next to the field to select a date. You can select just a From date or just a To date. It is not necessary to enter both.

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

Destroy Date

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

Select from the available options.



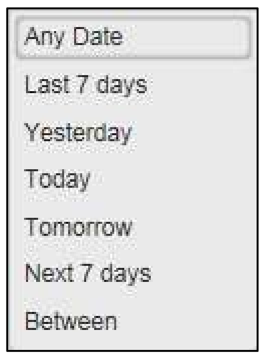
If you select Between, you will need to enter a From/To date. Type in a date, or click the grid picker next to the field to select a date. You can select just a From date or just a To date. It is not necessary to enter both.

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

Status Date

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

Select from the available options.



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

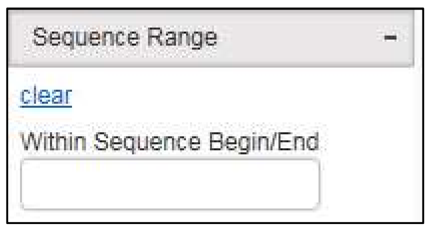
Once you have entered your dates, click **Apply**.

From/To Date

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

Sequence Range

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



Perm Flag

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

Clear Filters

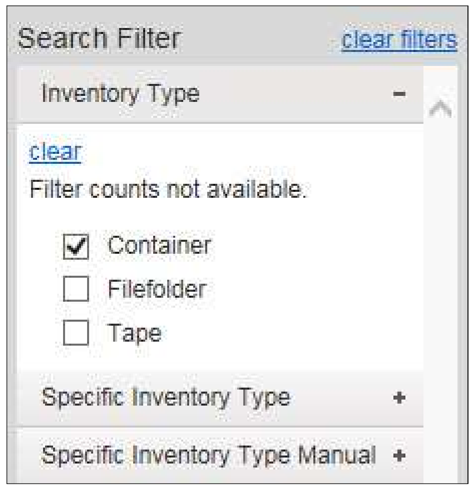
Each filter section has a **Clear** link that clears that specific filter. The results in the grid will be updated to reflect the cleared filter.

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

Result Limit Exceeded

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

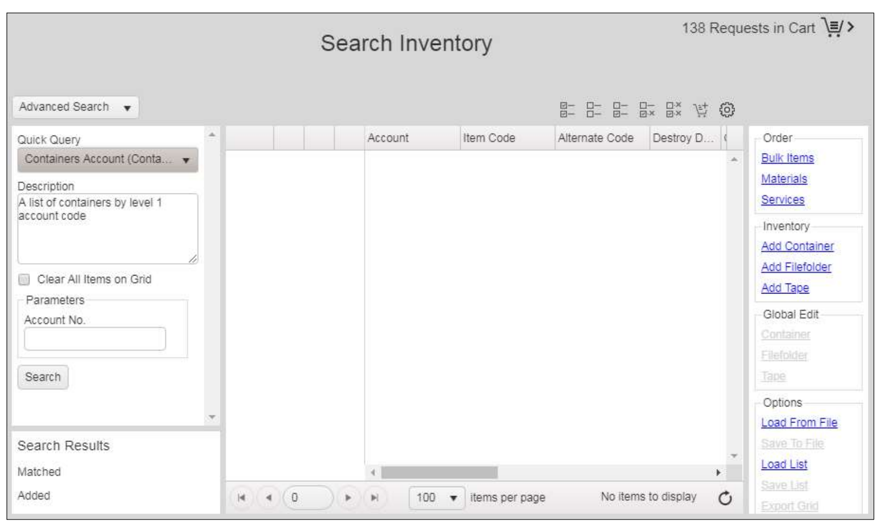
Filter counts will not be available until you apply additional filters to narrow the results. Any time filter counts are not available, a note is included in the Search Filter section.



Advanced Search

Advanced Search displays the Quick Query panel.

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



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

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

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

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

Click **Search** to run the query.

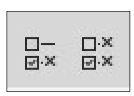
NOTE: If you add a container, filefolder, or tape while in the Advanced Search mode, the row is added to the grid.

Search Results

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

Icons

Two additional icons are displayed in the Advanced Search mode.

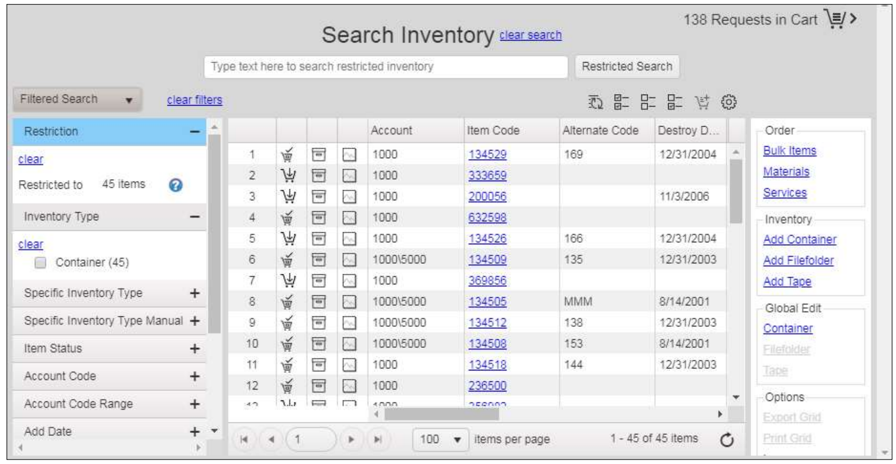


Clear Selected: removes all selected items from the grid.

Clear All: removes all items from the grid.

Switch from Advanced to Filtered Mode

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



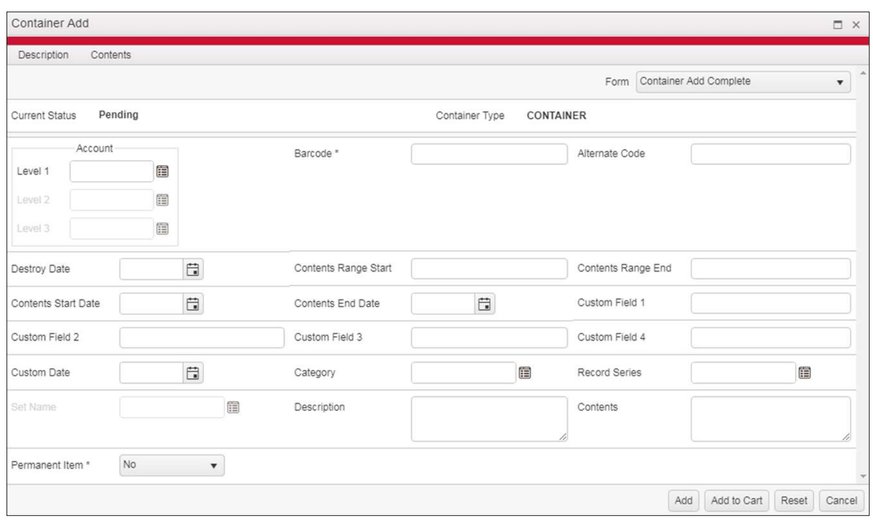
A Restriction panel is displayed at the top of the Search Filters panel. It indicates the number of items from the last Advanced Search that the results are restricted to. The panel title is blue to bring attention to it. A **Help** icon is also included. Hover over the icon to display a message explaining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

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

Add Container

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

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

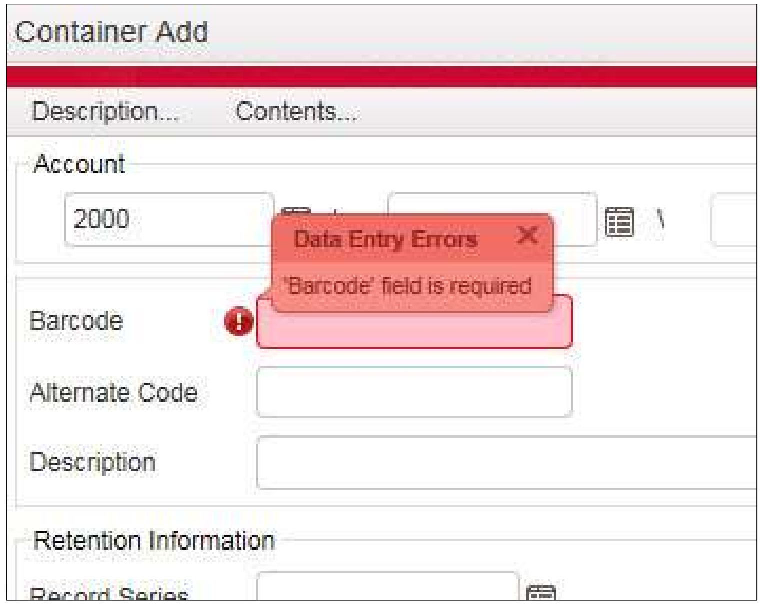


Your record center may have created custom data entry forms for you. To view available forms, click the Form drop down list and make your selection. The default is automatically set to the last form you opened.

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

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

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



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

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

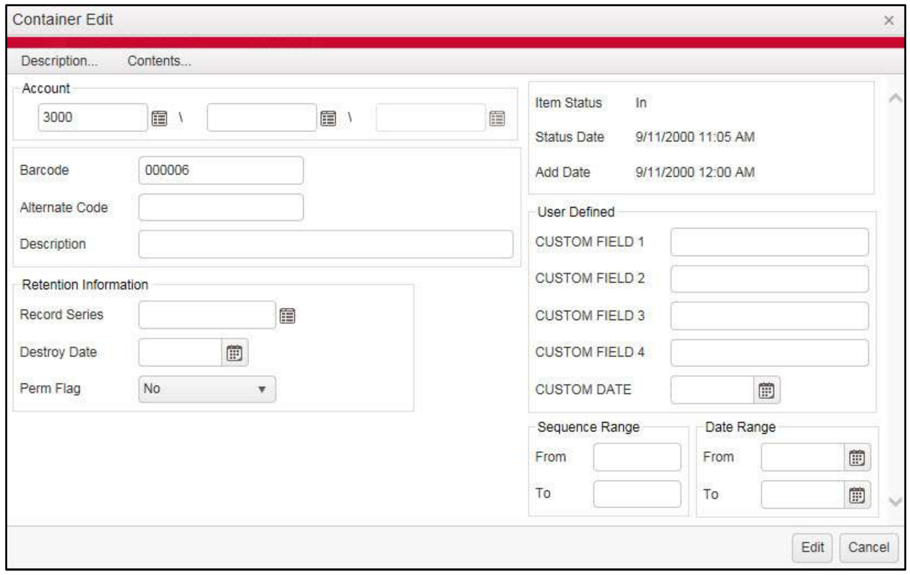
Continue adding any additional containers. When you have finished entering data, click **Cancel** to return to the **Results** grid.

Edit Existing Containers

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

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

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



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

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

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

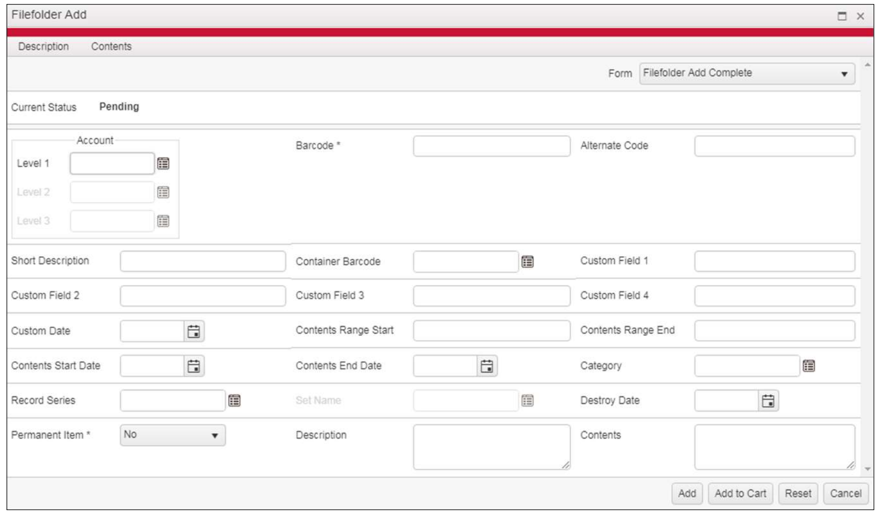
Once you have completed the fields, click **Edit**.

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

Add Filefolder

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

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

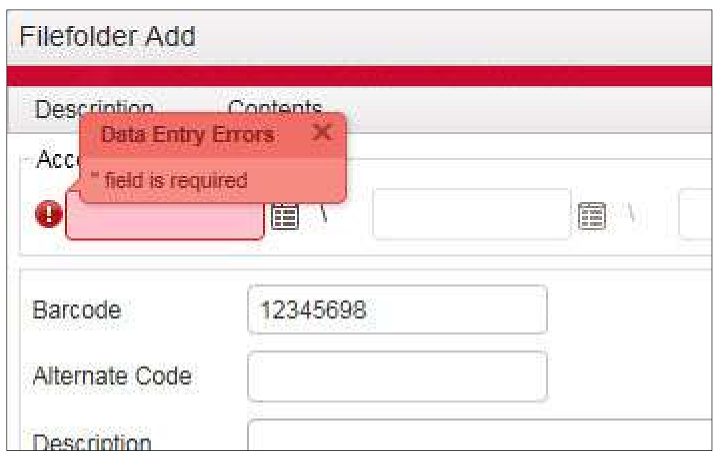


Your record center may have created custom data entry forms for you. To view available forms, click the Form drop down list and make your selection. The default is automatically set to the last form you opened.

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

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

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



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

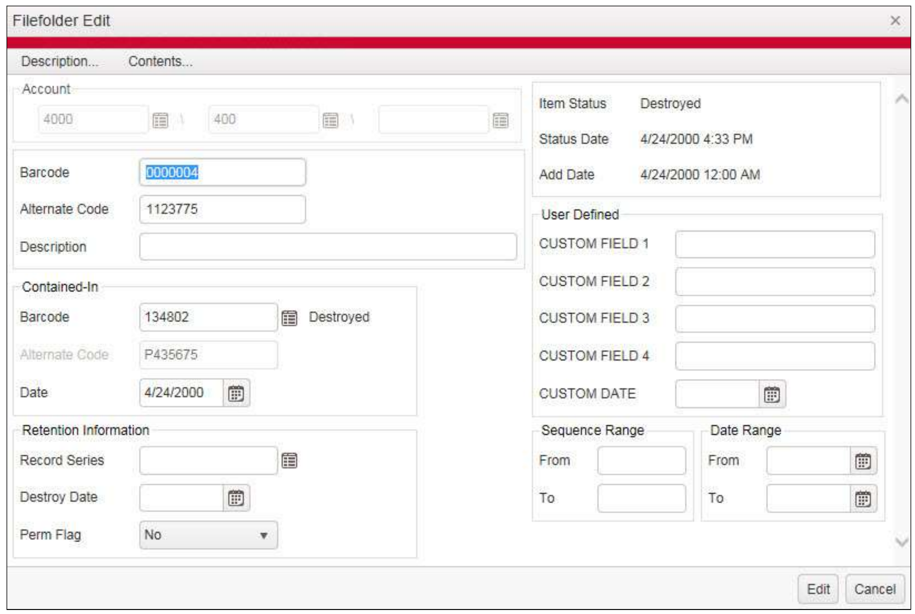
Continue adding any additional filefolders. When you have finished entering data, click **Cancel** to return to the **Inventory** grid.

Edit Existing Filefolders

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

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

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



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

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

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

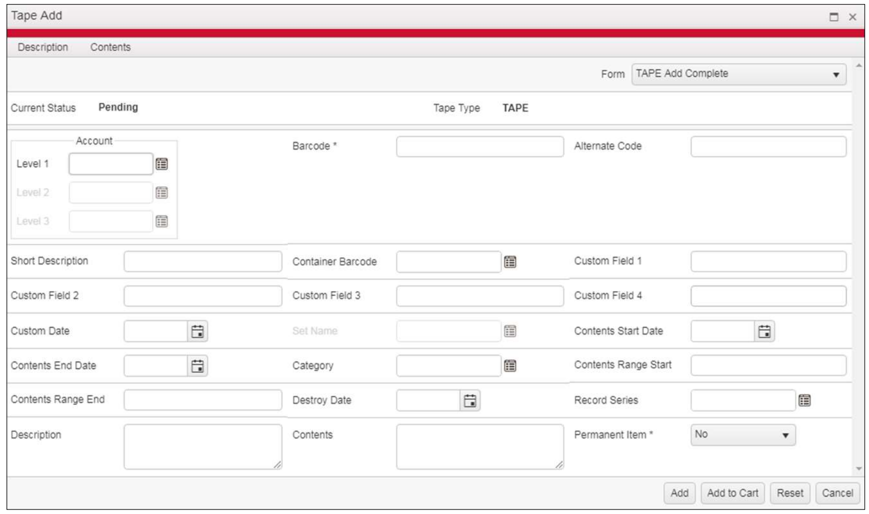
Once you have completed the fields, click **Edit**.

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

Add Tape

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

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

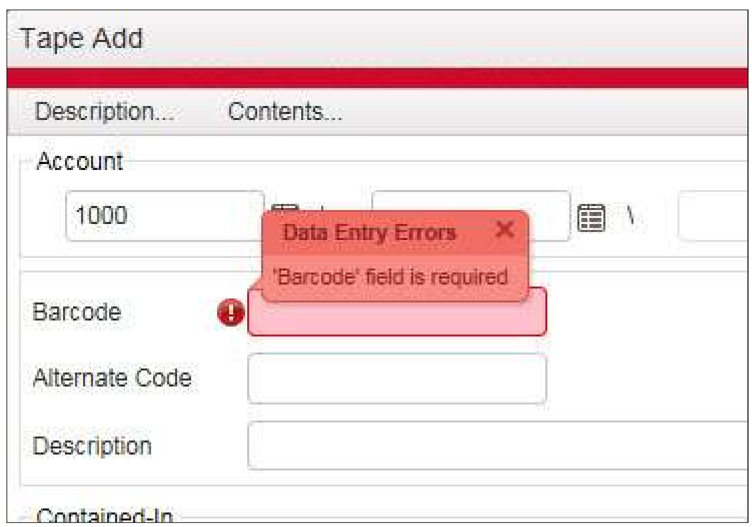


Your record center may have created custom data entry forms for you. To view available forms, click the Form drop down list and make your selection. The default is automatically set to the last form you opened.

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

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

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



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

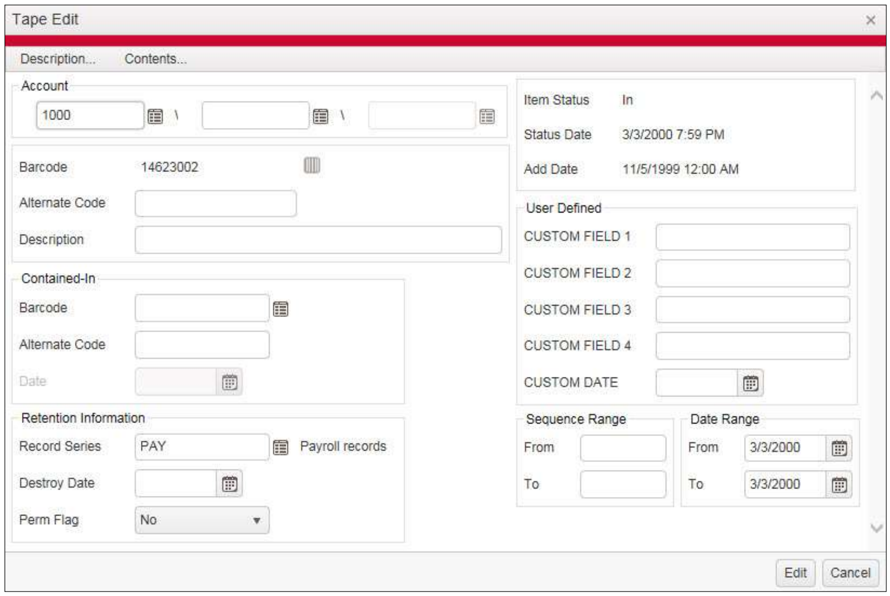
Continue adding any additional tapes. When you have finished entering data, click **Cancel** to return to the **Inventory** grid.

Edit Existing Tapes

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

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

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



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

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

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

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

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

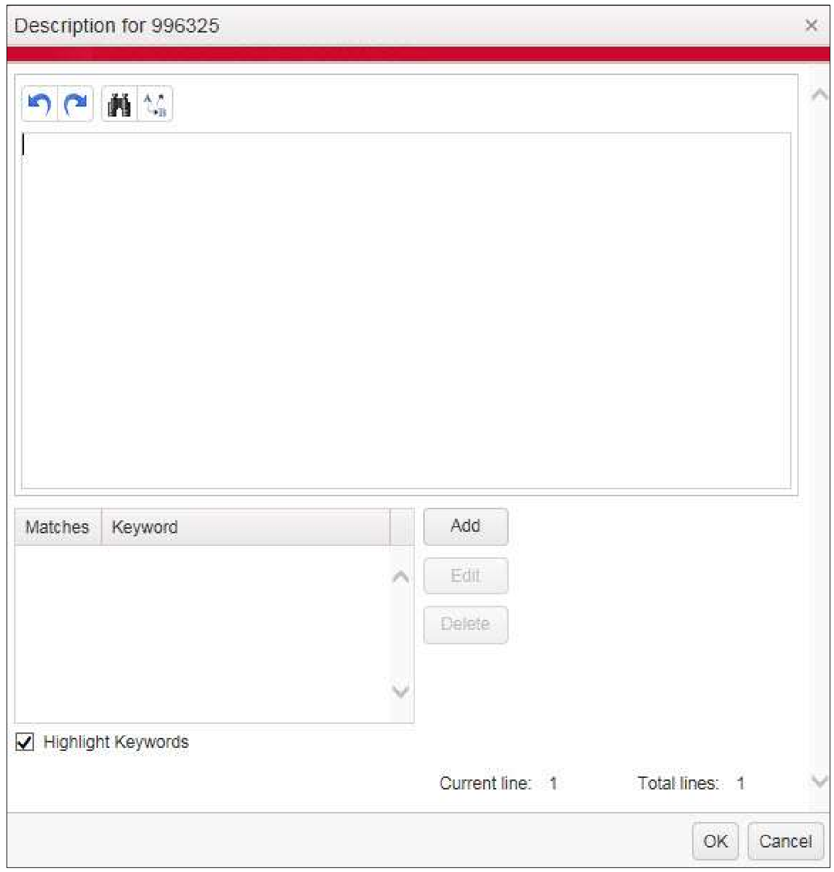
View Item Activity

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

Alt + Shift + 7	simulate "Move First" button click
Alt + Shift + 8	simulate "Move Previous" button click
Alt + Shift + 9	simulate "Move Next" button click
Alt + Shift + 0	simulate "Move Last" button click

Description

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

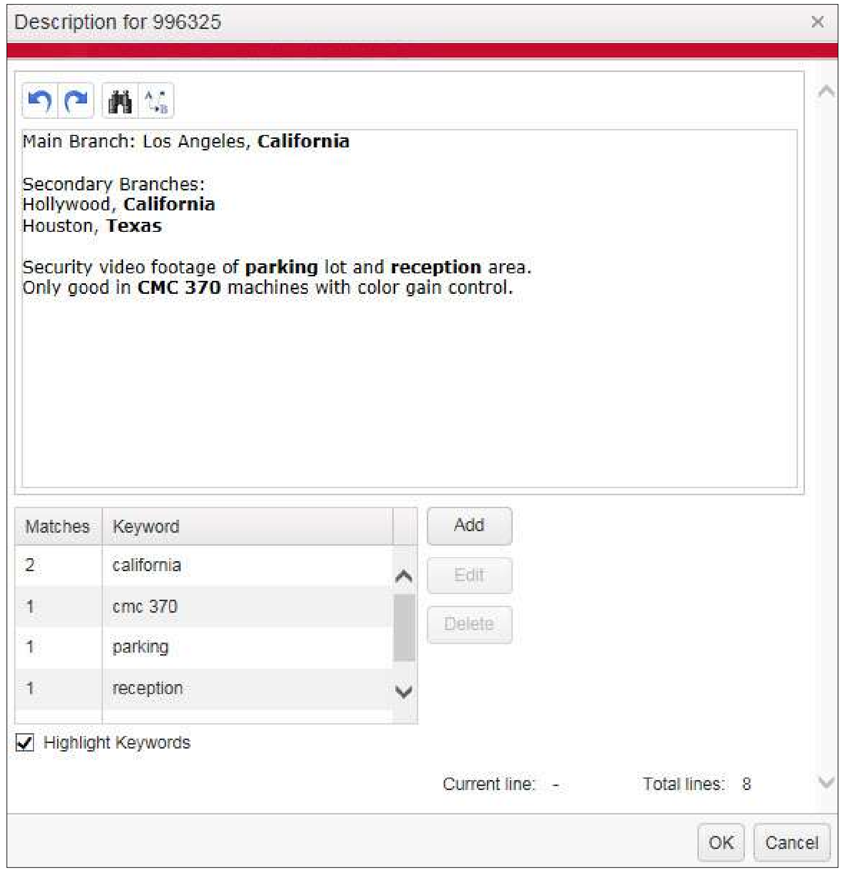


Description text is entered in the top section. The current line being edited and the total number of lines are displayed in the lower right corner.

Keywords

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

Type your keyword and click **Add**.



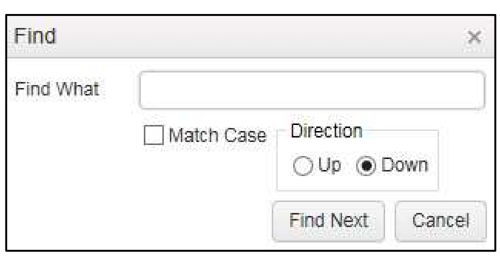
The keyword list includes a count of the number of times the keyword appears within the description text. Keywords do not have to appear in the text. Keywords that do not appear in the text have a zero match count in the keyword list. Existing keywords can be edited or deleted.

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

Find

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

Enter the text you want to find.

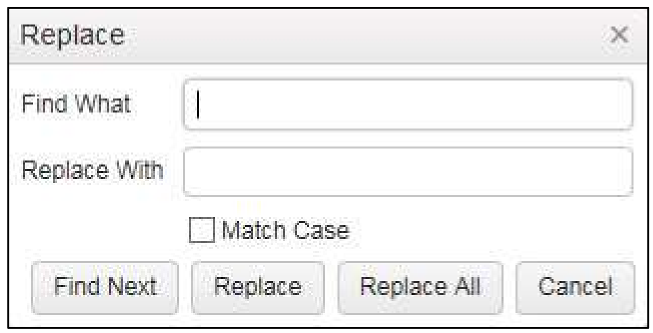


You can choose to match the case of the text and also choose to search up or down. Click **Find Next**. When you have finished, click **Cancel** to close the dialog box.

Find and Replace

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

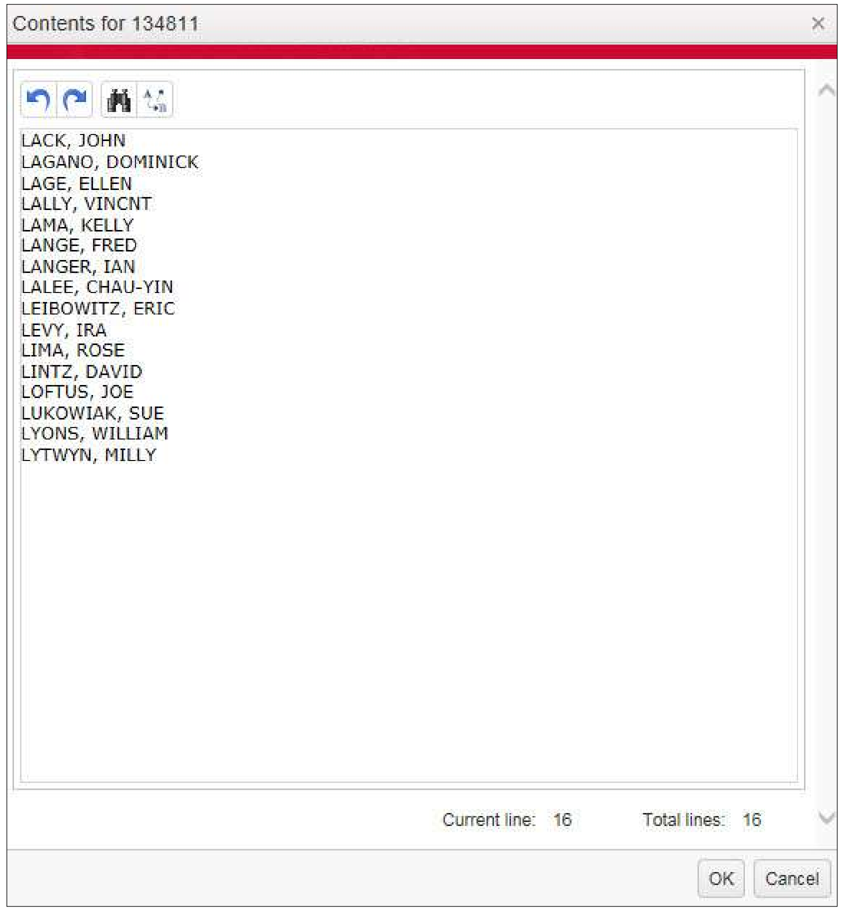
Enter the text you want to find and the text you want to replace it with. You can choose to match the case of the text.



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

Contents

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

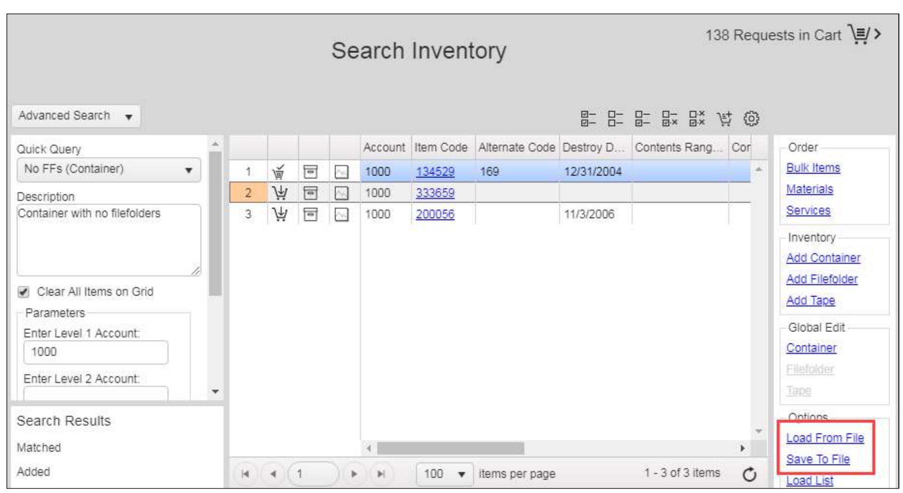


The current line being edited and the total number of lines are displayed in the lower right corner. **Find** and **Find and Replace** buttons are available.

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

Load From File/Save to File

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

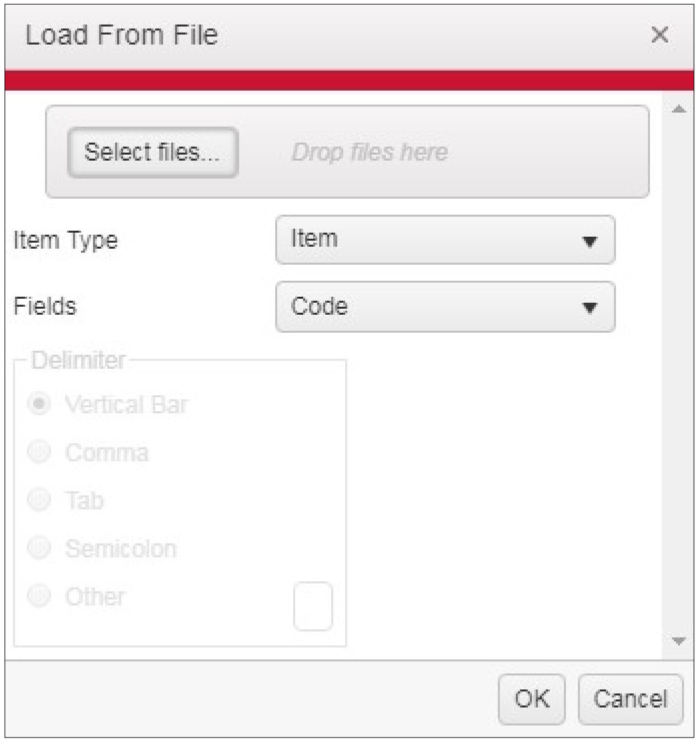


Load from File

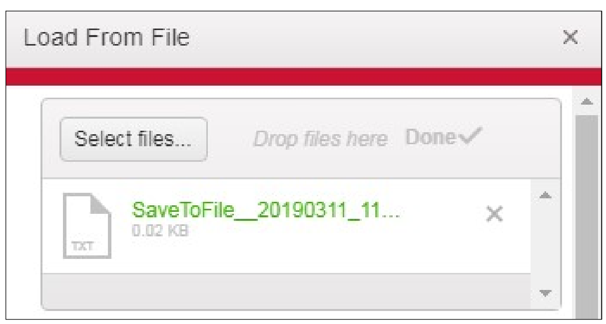
You have the ability to load a list of items from an external text file.

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

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



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



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

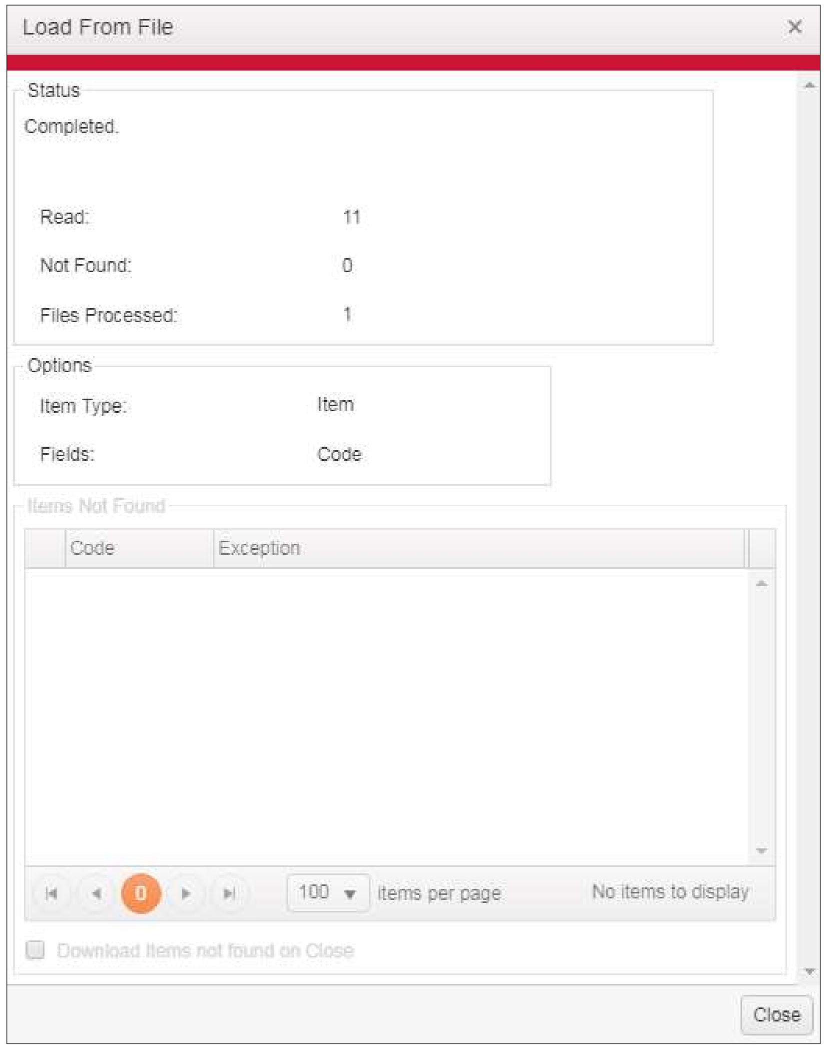
Fields: Click the drop down arrow to select the type of criteria used in your file.

Code
Alternate Code

Alternate Code + Account
Base Object + Code

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

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

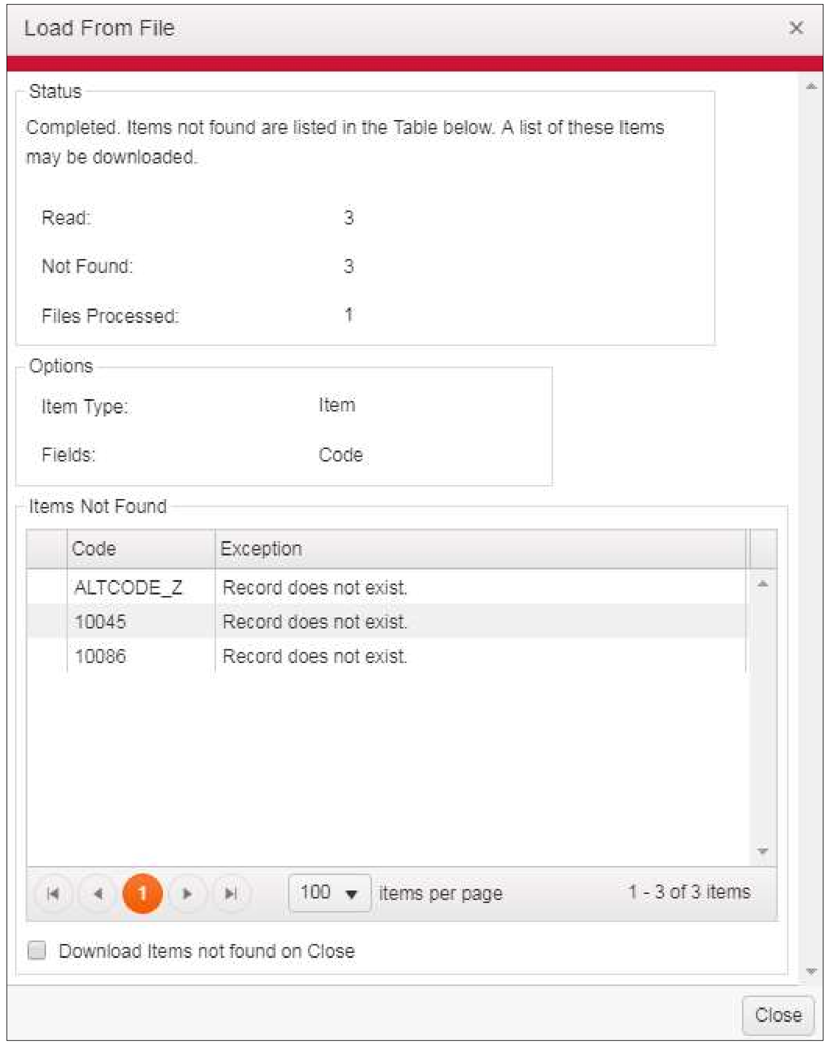


Click **Close** and the matched items are added to the **Search Inventory** grid.

Items Not Found

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

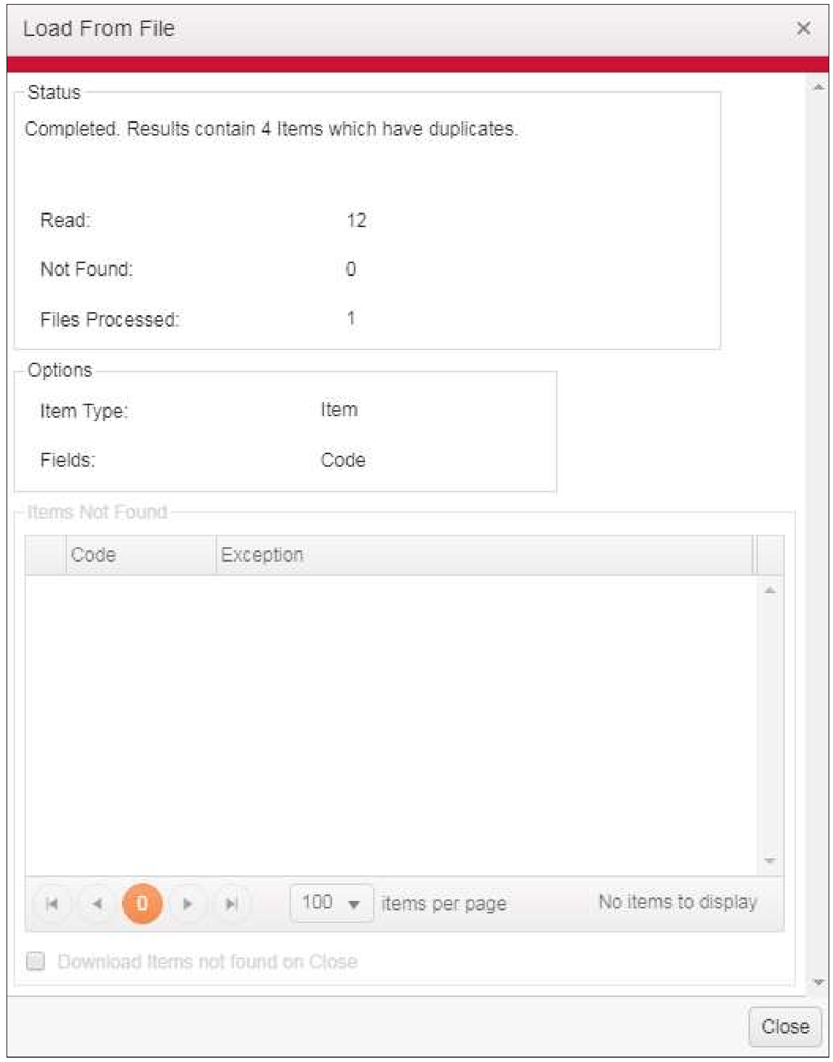
NOTE: No more than 1,000 items will be displayed in the grid.



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

Duplicates

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

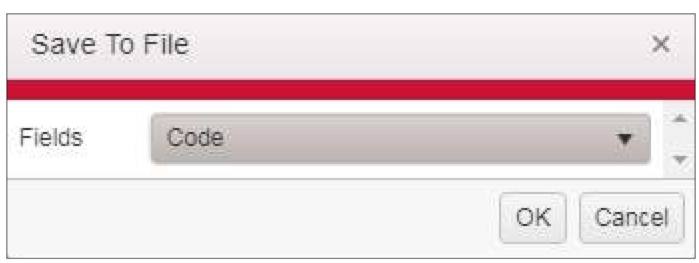


Click **Close** and all items (including the duplicates) are loaded onto the grid.

Save to File

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

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

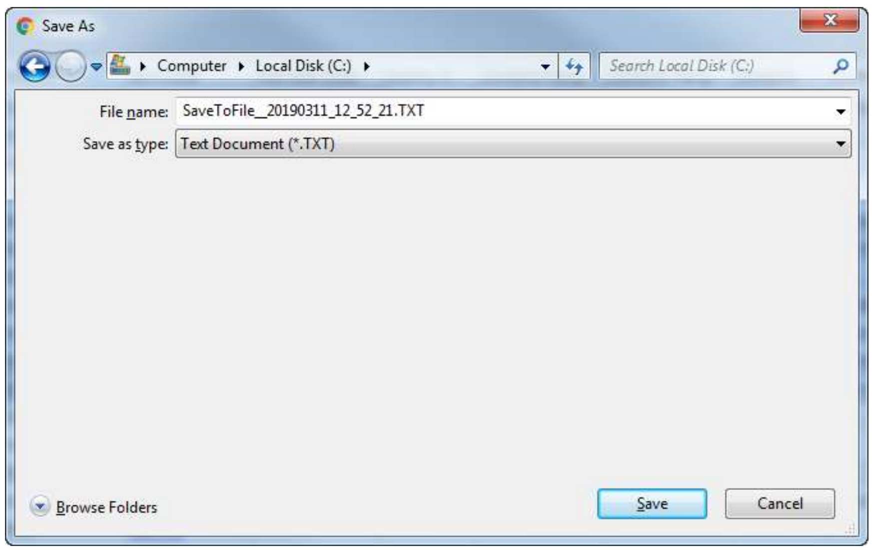


Fields: Click the drop down arrow to select the type of criteria you want to use.

Code
Alternate Code + Account
Base Object + Code

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

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



Click **Save**.

Function Access

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

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

Save List/Load List

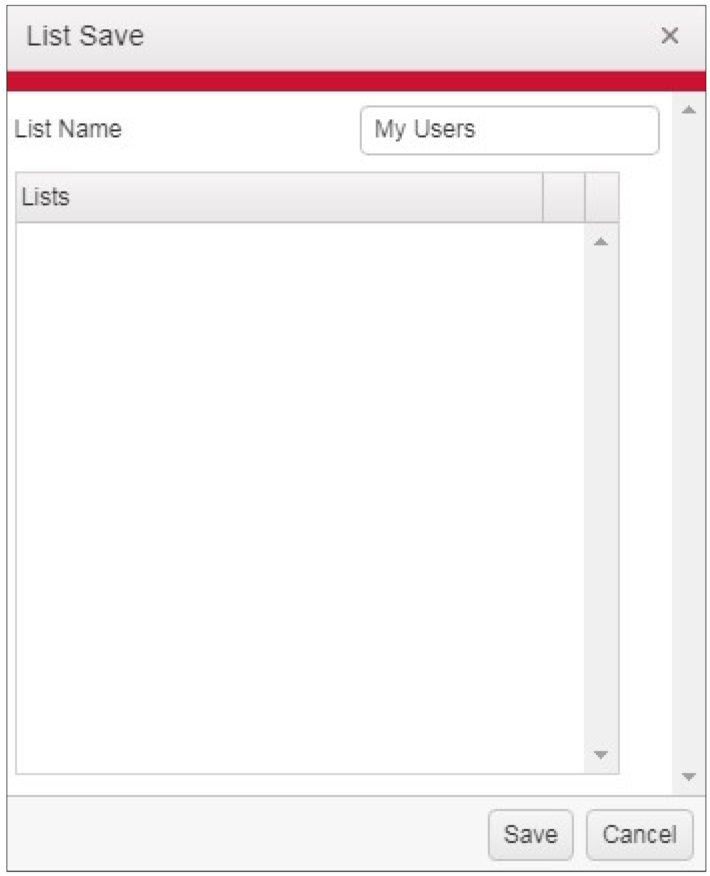
In the **Search Inventory** grid, you can save and load a list.

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

Save List

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

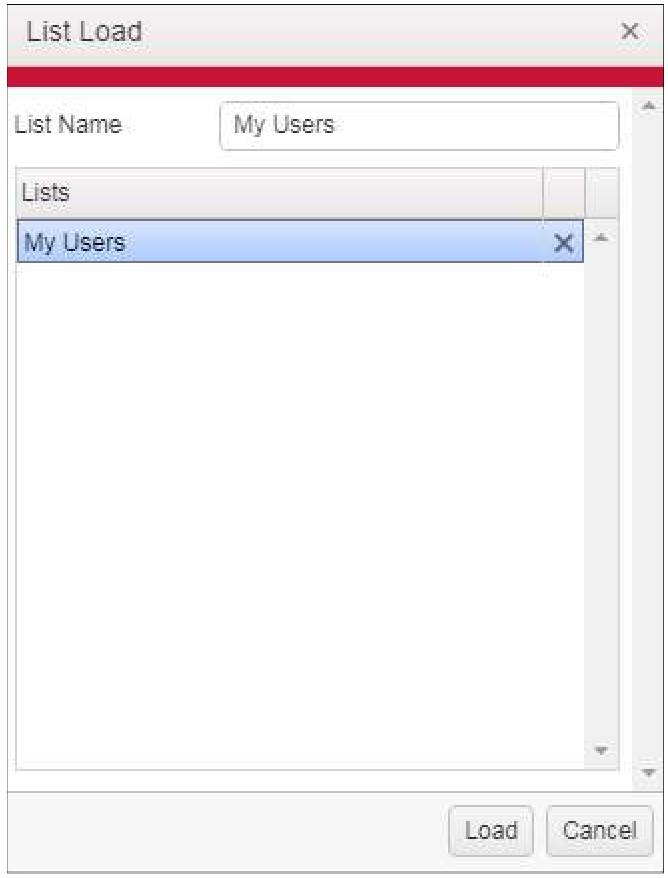
Load all the items you want to appear in your list. Make sure they are selected. Then from the **Options** menu, select **Save List**.



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

Load List

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



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

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

Function Access

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

Feature	Permission	Access
Item	Load List	Yes
Item	Save List	Yes

Order

Cart

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

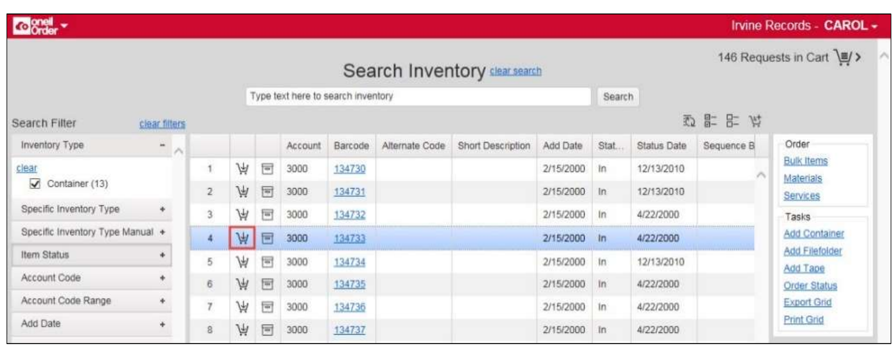
NOTE: The cart only applies to the user logged in (with the exception of the Web User Administrator). So each user will have their own cart containing only the items they have added. Items remain in the cart after you log out, so they will still be there the next time you log back in.

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

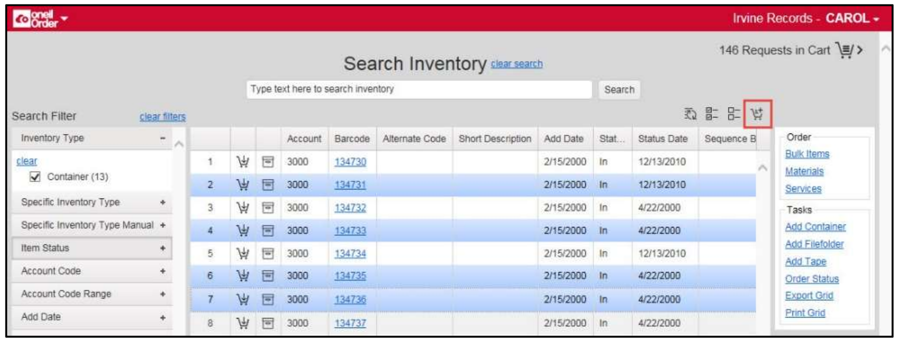
Add Requests to Cart

Containers, Filefolders, and Tapes

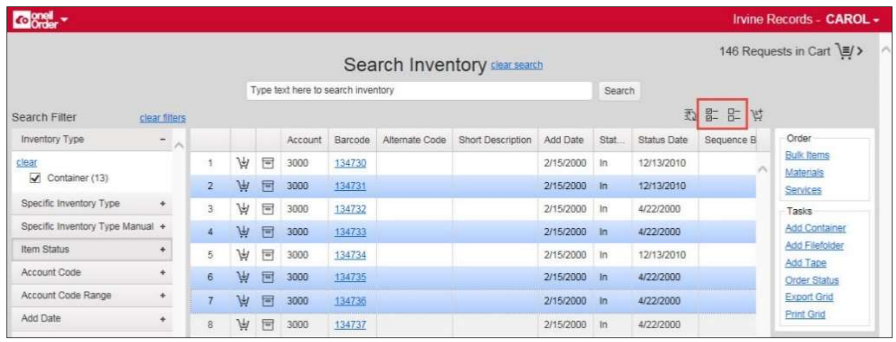
Search for the item you want to order. Once it is loaded on the cart, select it and then click the **Add Item to Cart** icon to add it to the cart. You can also right click on the row and from the context menu, select **Add Item to Cart**.



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



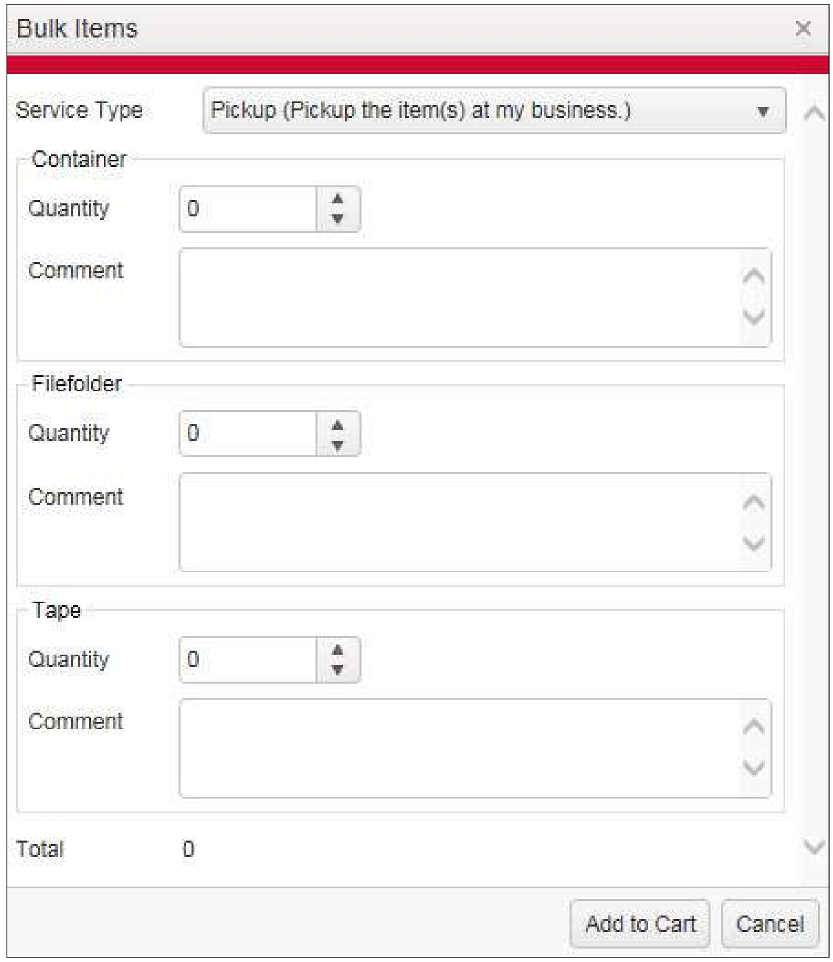
To select or unselect all items in the grid, use the **Select All** or **Unselect All** icons. You can also right click in the grid and from the context menu, select **Select All**, or **Unselect All**.



Bulk Items

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

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



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

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

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

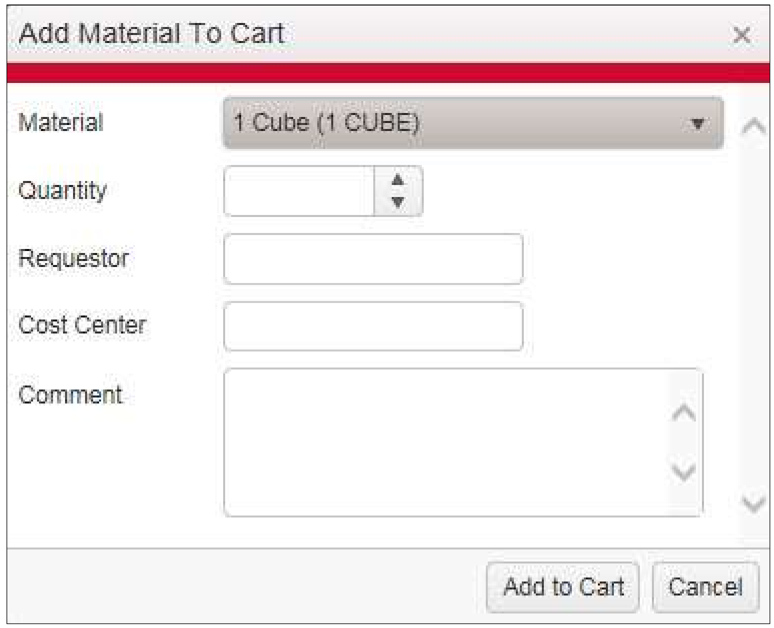
Total: The total number of items displays at the bottom of the dialog box.

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

Materials

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

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



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

Quantity: Enter the quantity you are requesting.

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

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

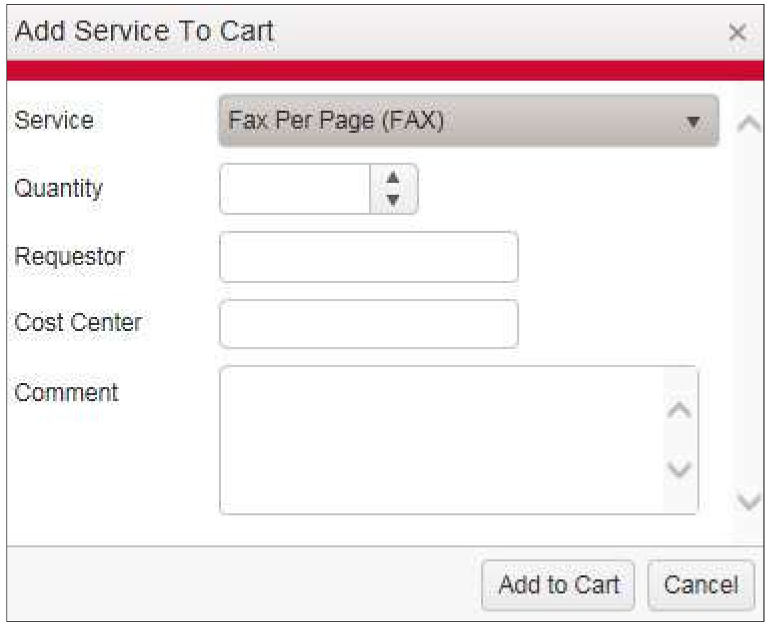
Comment: Enter any additional comments you want the record center to receive.

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

Services

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

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



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

Quantity: Enter the quantity.

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

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

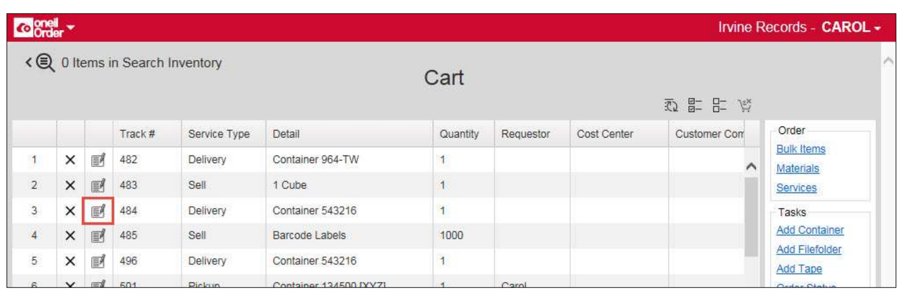
Comment: Enter any additional comments you want the record center to receive.

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

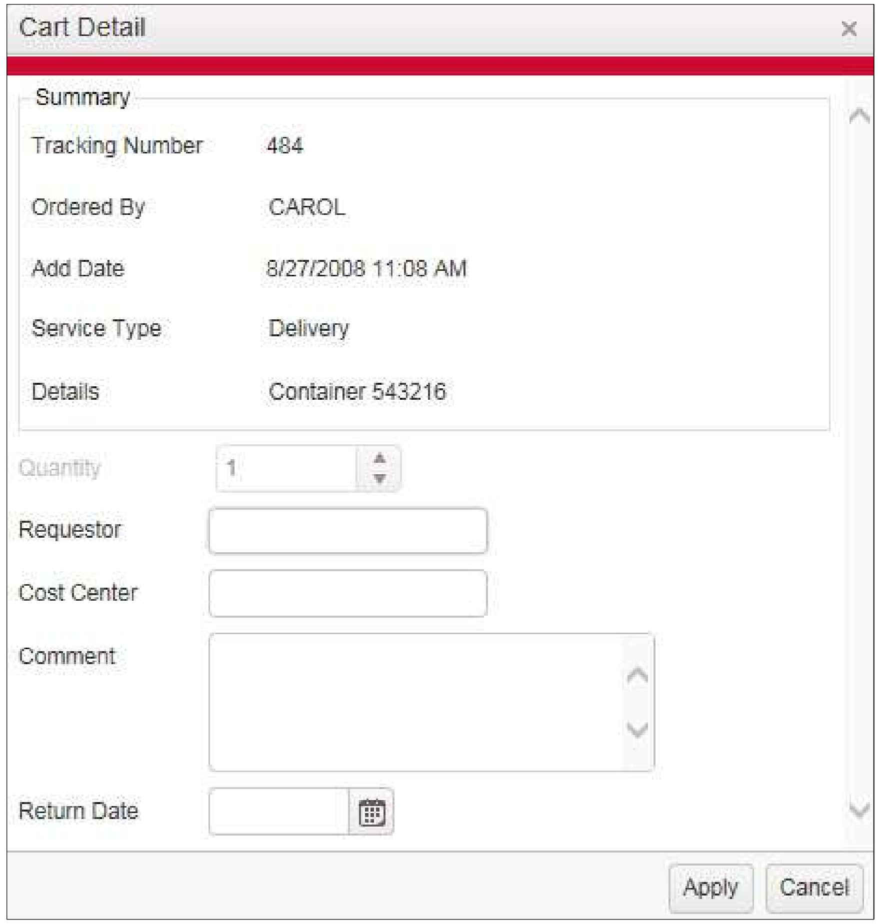
view the image in oneilOrder. Load your order onto the

View/Edit Requests

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



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



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

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

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

Place a Web Order/Workorder

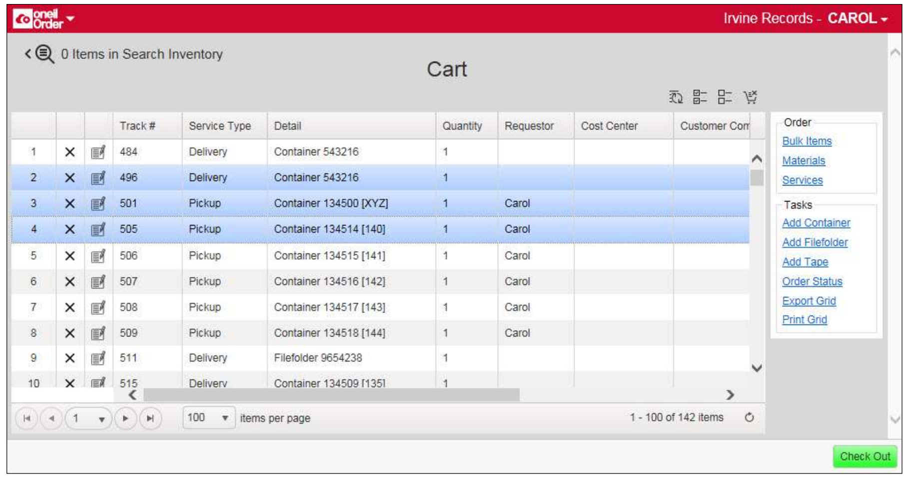
Once you have added requests to your cart, you are ready to check out. This is what actually sends your request to the record center.

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

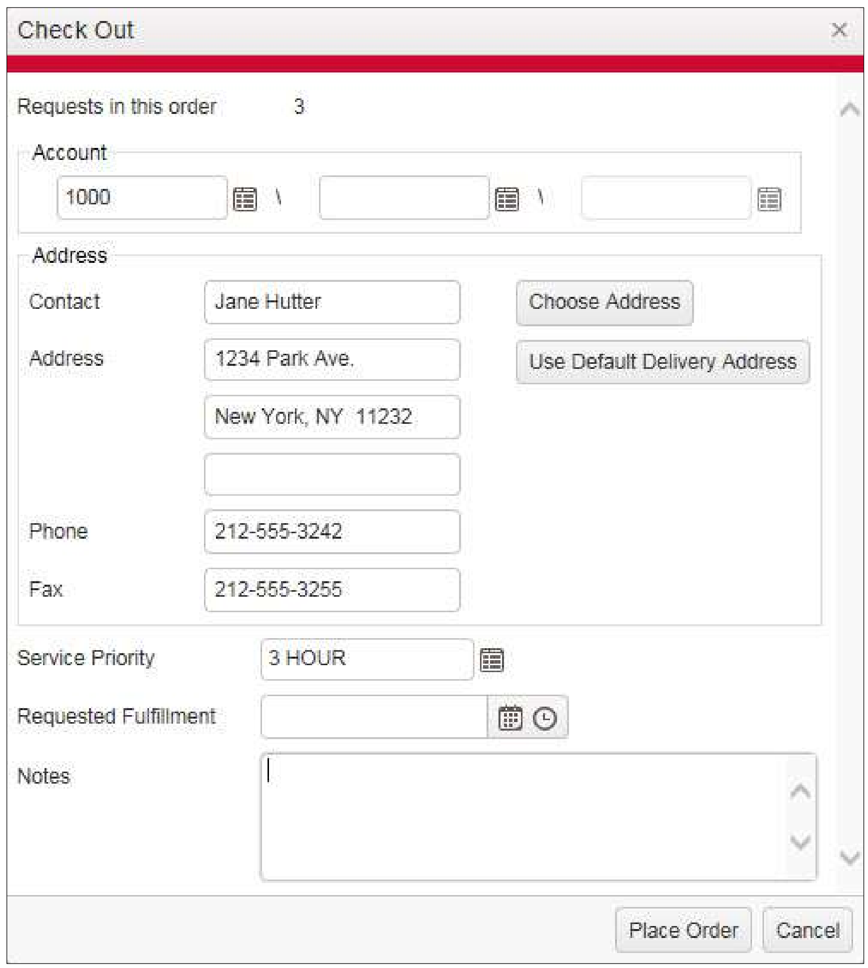
Each request you add to the cart is given a tracking number. Once you create an order or workorder, a batch number is assigned to that group of requests. A batch can have one or a number of requests assigned to it. Your record center will discuss with you how it uses batches and together you can determine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

Check Out Web Order

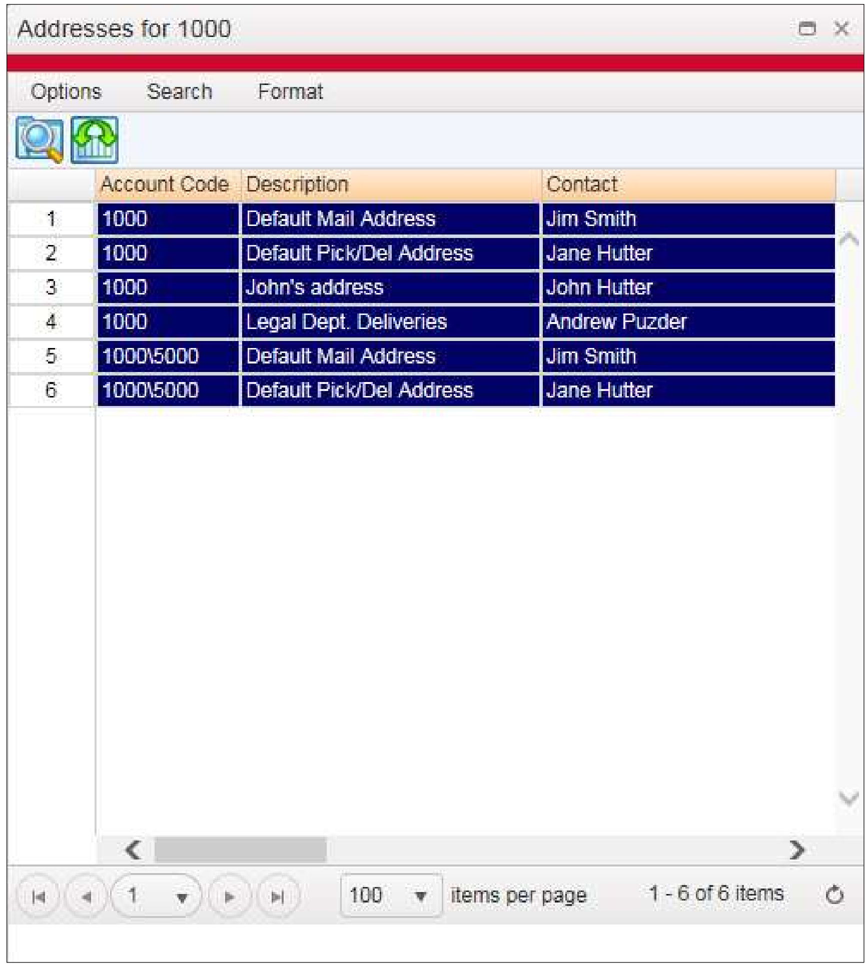
Select the requests in the cart that you want included in the order.



Click **Check Out**.



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



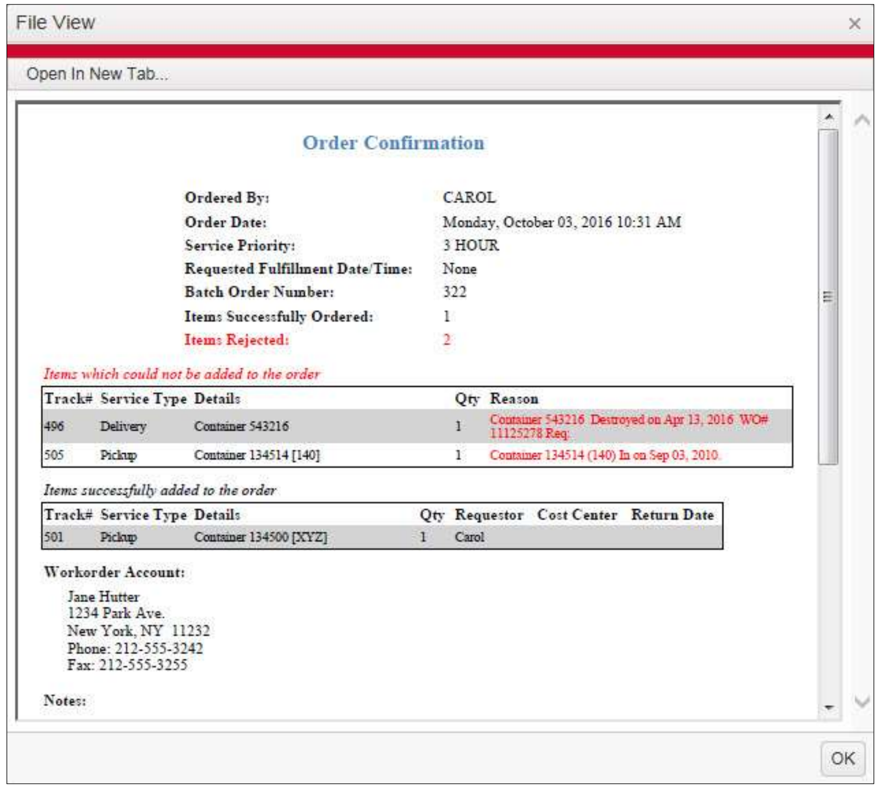
Right click on the address you want and select **OK**. The address fields are automatically populated.

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

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

When you have finished, click **Place Order**. The order is submitted and a Check Out summary is displayed.

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

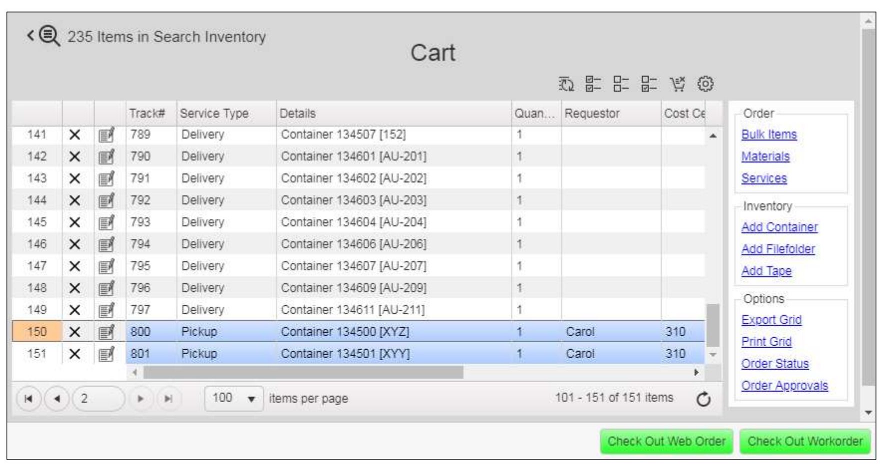


Click **Open In New Tab** to view the confirmation in a full screen. Click **OK** to close the summary and return to the cart.

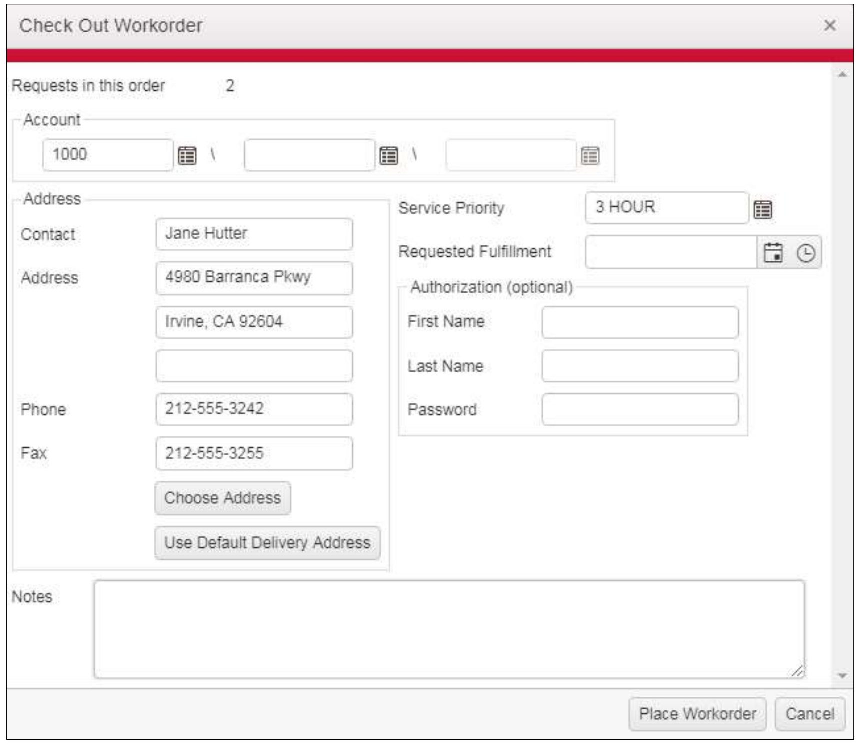
The requests have been removed from the cart. The order has been sent to the record center. They will post the requests to a workorder and fulfill your order.

Check Out Workorder

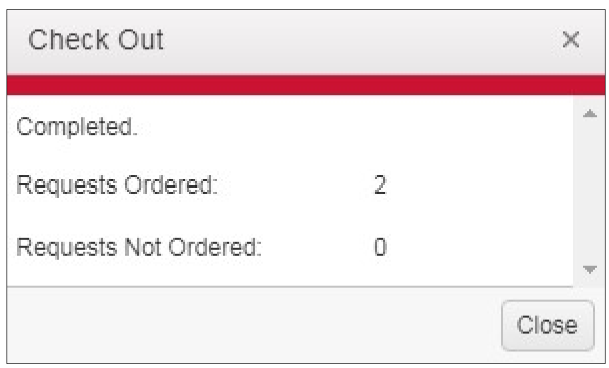
Select the items in the cart that you want included the same as you would for a web order.



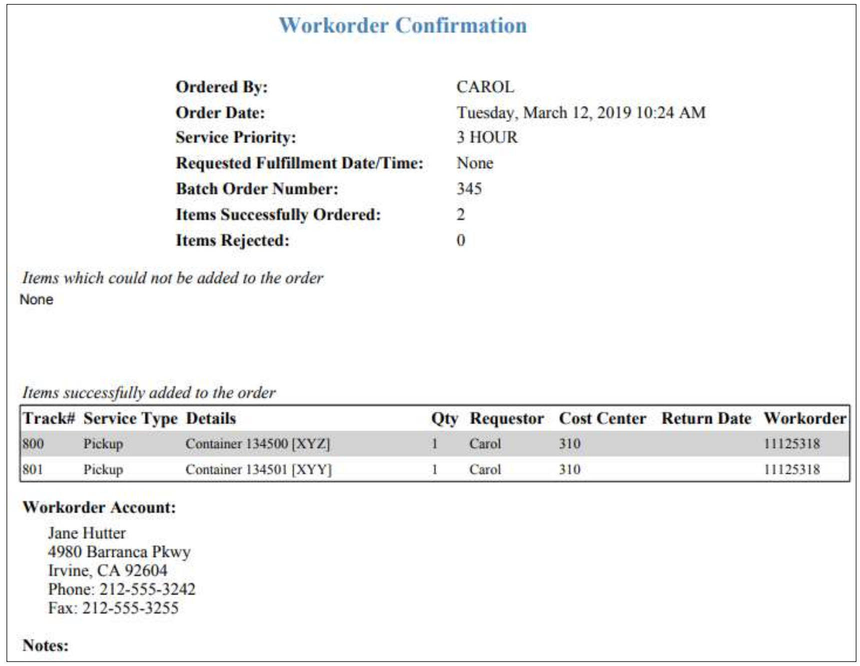
Click the **Check Out Workorder** button.



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



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



Workorder Confirmation

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

Items which could not be added to the order

None

Items successfully added to the order

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

Workorder Account:

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

Notes:

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

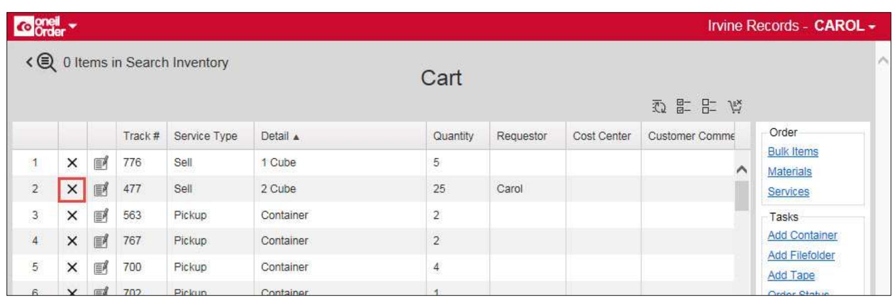
The items have been removed from the cart, and the workorder has been sent to the record center. They will process the workorder and fulfill your request.

Remove Requests from Cart

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

Remove Current Row

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



Remove Selected Rows

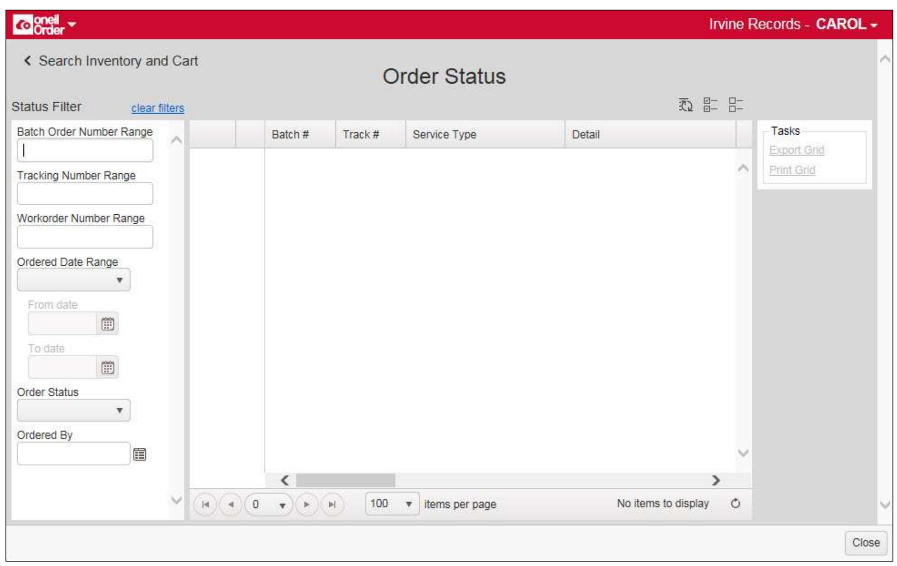
To remove several requests from the cart at once, select the requests you want to remove. To select all requests in the cart, click the **Select All** icon.

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

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

Order Status

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



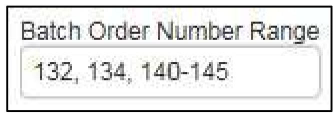
NOTE: If the user logged in is a Web User Admin with permission to modify the cart, the **Order Status** grid will also display the Ordered By, Placed In Cart By, and Placed In Cart Date Time columns.

You can find the orders that you want to track using different criteria. You can tell the system what batch numbers, tracking numbers, or workorders you are looking for, or you can pull up any orders that were placed during a specified period.

Alternately, you can search by the orders' status to find all orders that have reached a specific status. You can also use more than one of the search variables to find orders that match more than one criterion. For example, find all orders placed during the last week that have been fulfilled.

Search by Batch Number Range

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



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

Search by Tracking Number Range

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

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

Search by Workorder Number Range

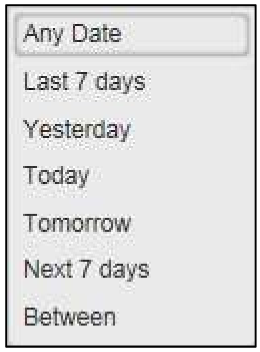
Searching by workorder number works similar to searching by batch or tracking number. The difference is that this field is alphanumeric. To search for orders by workorder number, you can enter a single workorder number, more than one workorder number, a range of workorder numbers, or a combination. Multiple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

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

Search by Ordered Date Range

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

Select from the available options.



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

Search by Order Status

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

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

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

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

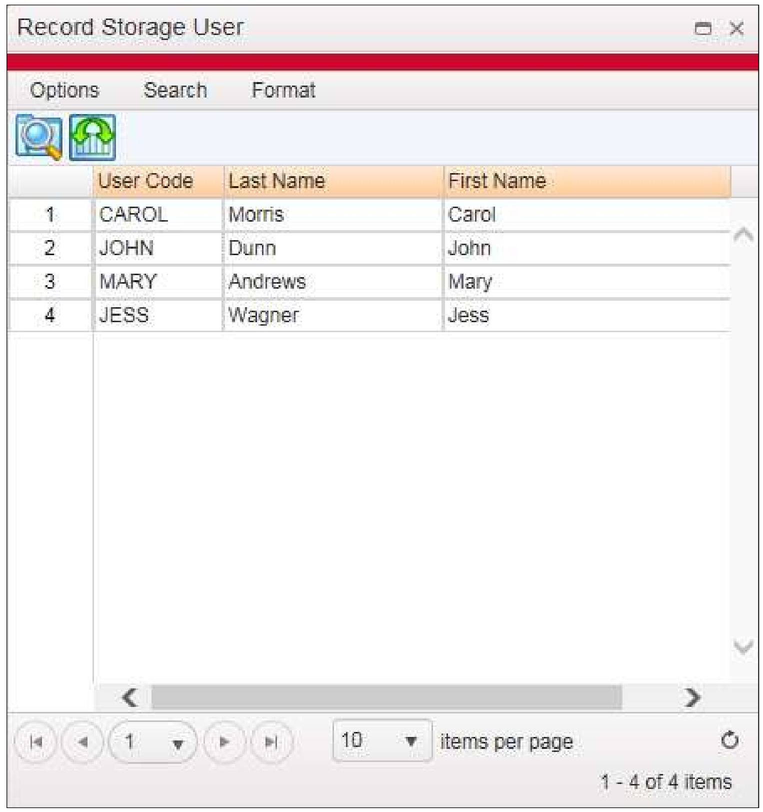
Fulfilled: Your order has been fulfilled.

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

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

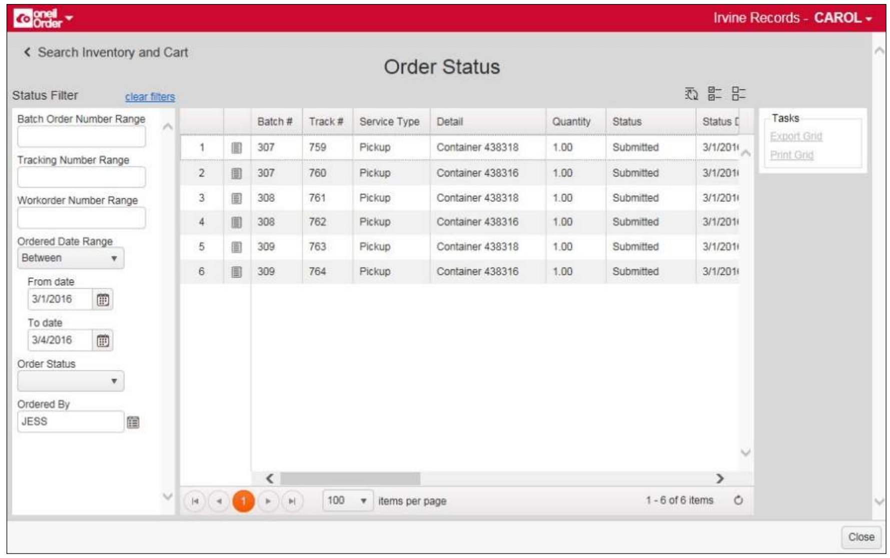
Search by Ordered By

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

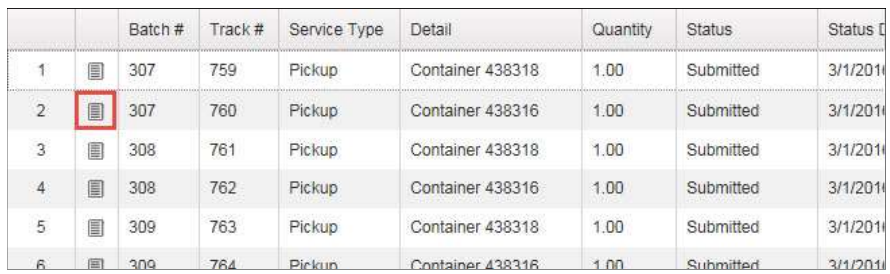


Search Results

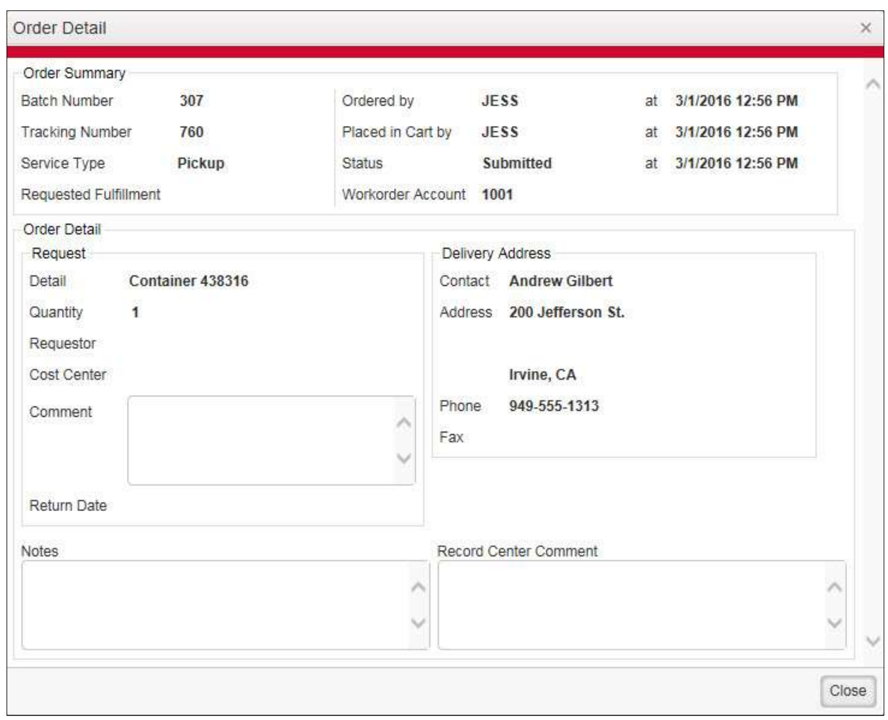
As you complete each filter field, the **Order Status** grid is populated with the orders that meet your search criteria.



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



The **Order Detail** dialog box appears.



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

Index

D

E

F

G

I

K

L

M

O

P

Q

R

S

T

U

V

W