DeepStore Online

O'Neil Order

Express User Guide

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Navigating O'Neil Order

Overview

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

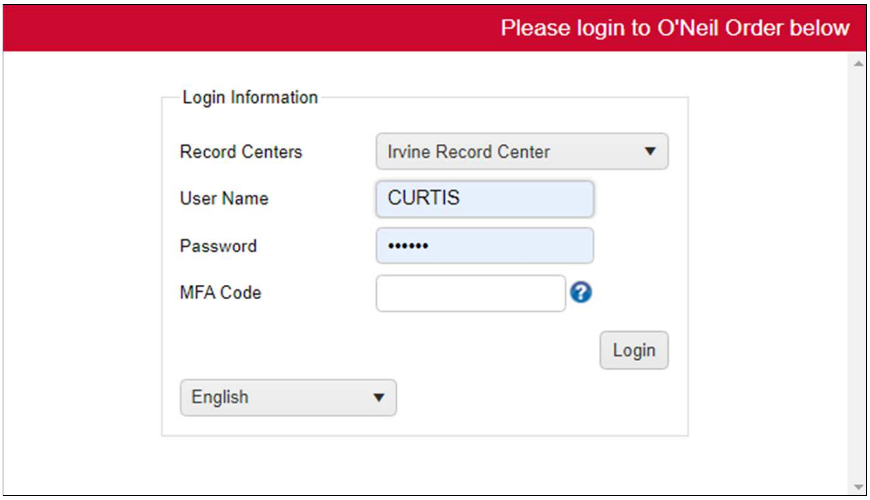
Through O'Neil Order and your Internet connection, you can query the record center database, request pickups or deliveries, check the status of your orders, and update the information associated with your stored items. O'Neil Order's modern interface provides full text search functionality, robust filtering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

Access O'Neil Order

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

Log In

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



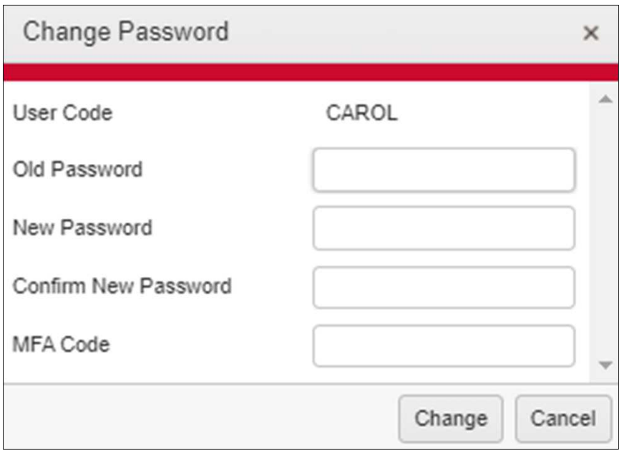
User Name/**Password**: Enter your User Name and Password in the appropriate fields.

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

Change Password

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

The **Change Password** dialog box appears.



Complete the fields and click **Change**.

Log Out

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

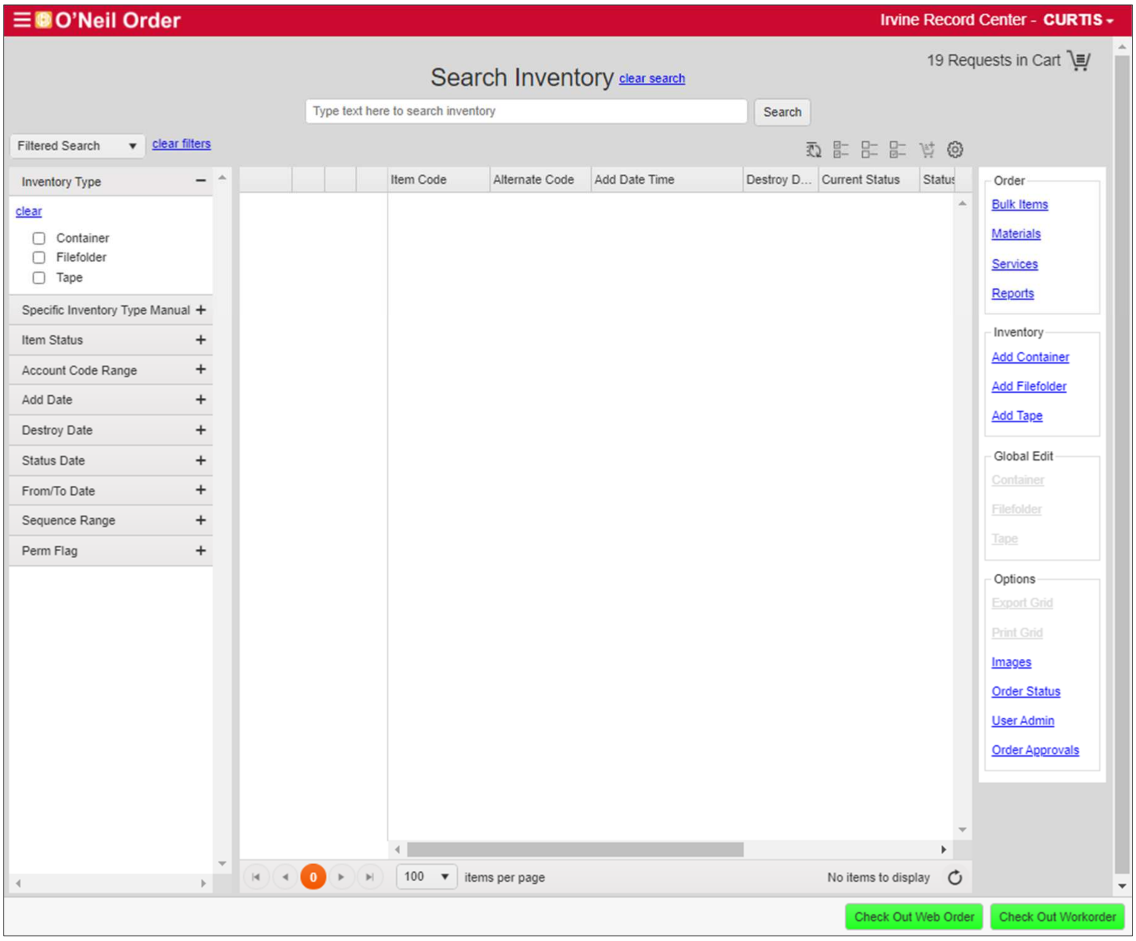
Time Out

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

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

Grids

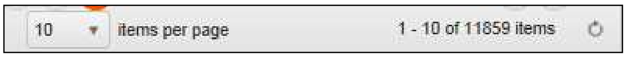
O’Neil Order opens to the **Search Inventory** screen.



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

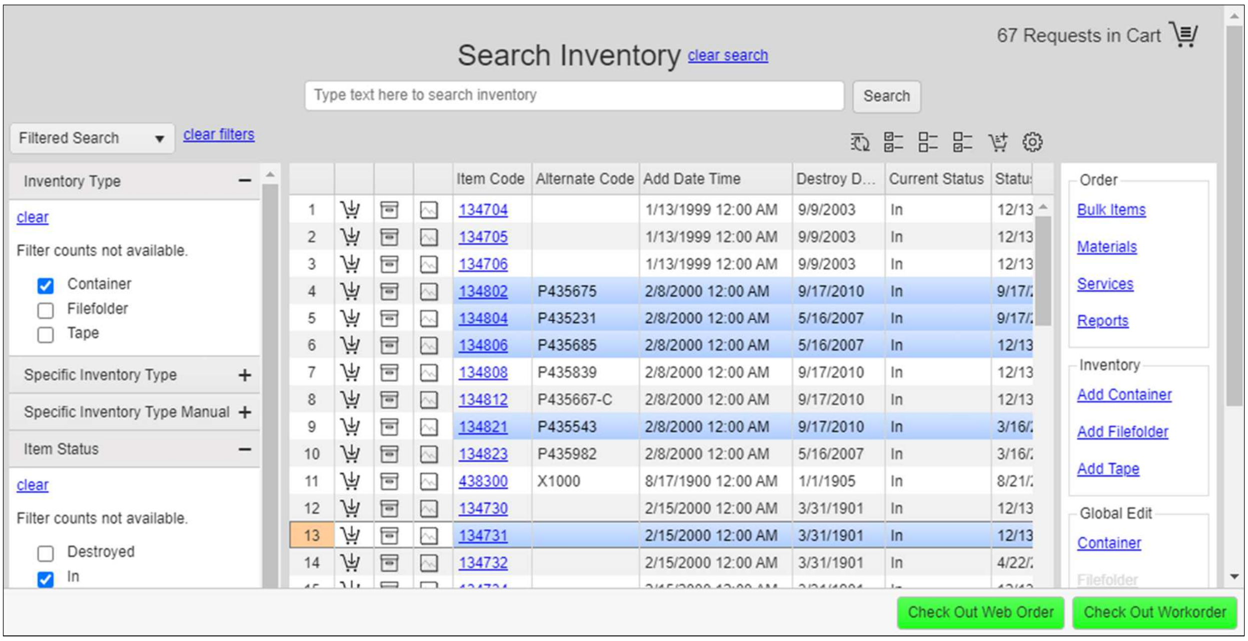
Page numbers display at the bottom of the grid. Click a number to go directly to that page. You can also use the arrow icons to move one page at a time, or go to the first or last page.

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



Select/Unselect Rows

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



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

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

Columns

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

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

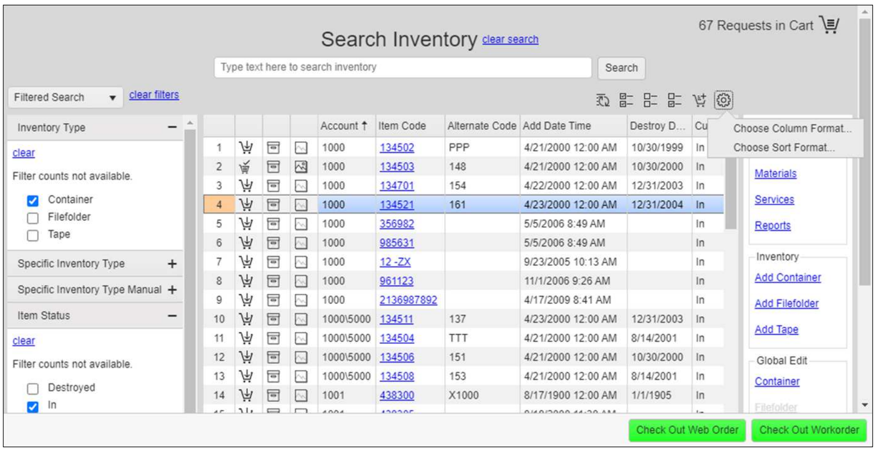
Columns cannot be removed from a grid; however, the order they appear in the grid can be changed. To move a column, click on the column heading and drag to the new location.

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.

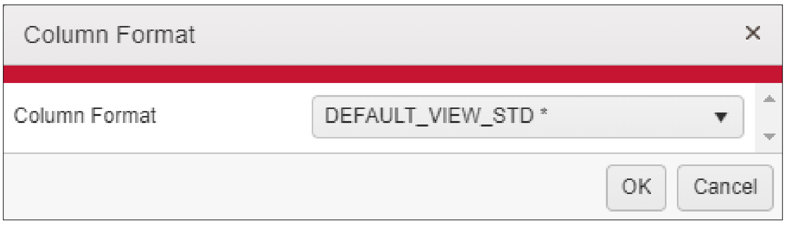
Column Format/Sort Format

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

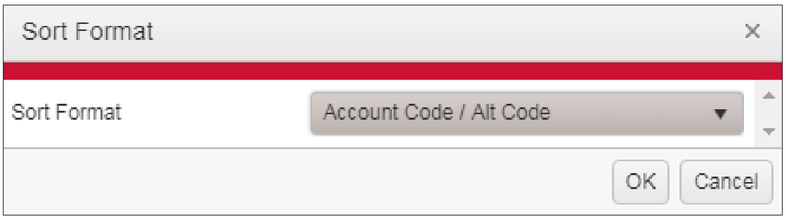
The Column Format determines which columns appear in the grid.



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

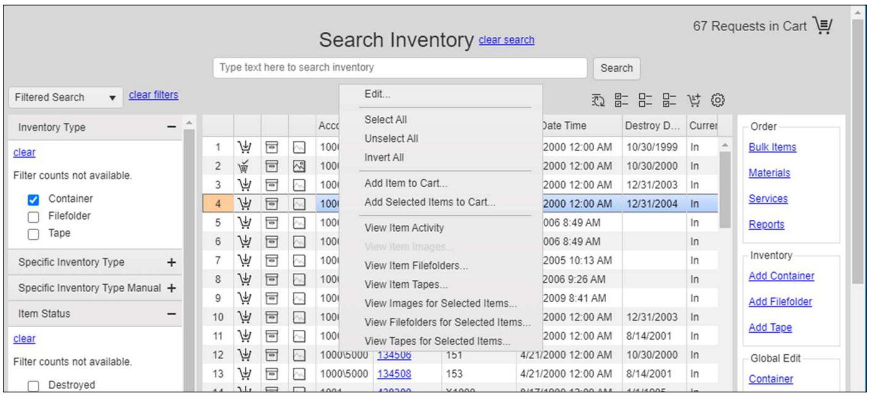
The Sort Format determines the order in which data is sorted in the grid.



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. Some of the options in this menu are also available elsewhere on the screen.

Icons

Most grids contain the following icons.

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

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

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

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

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

Settings: Displays the Settings menu items.

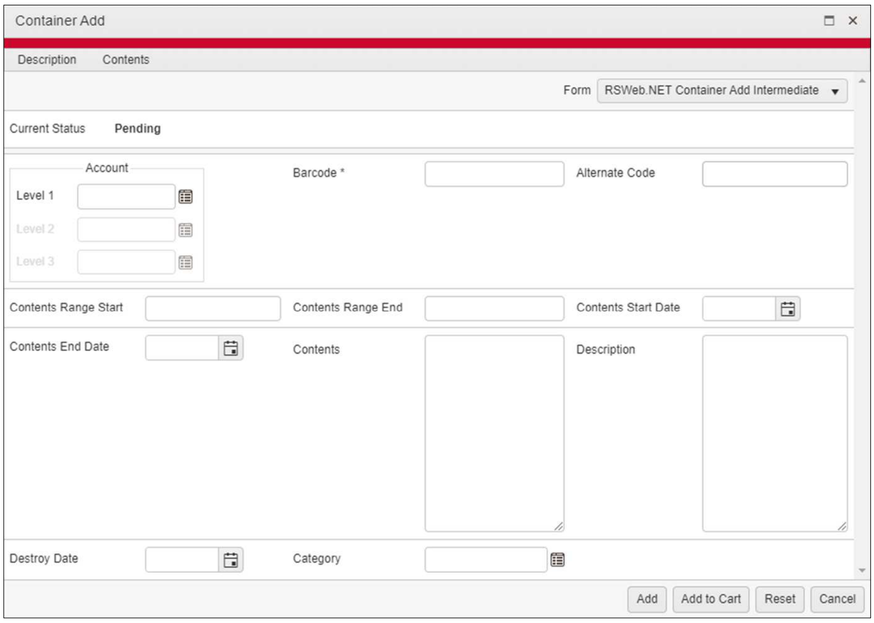
When you select **Advanced Search** in the **Inventory** grid, two additional icons are available.

Clear Selected: Clears all selected items from the grid.

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

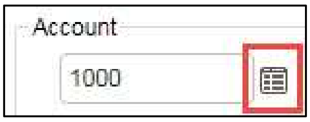
Dialog Boxes

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

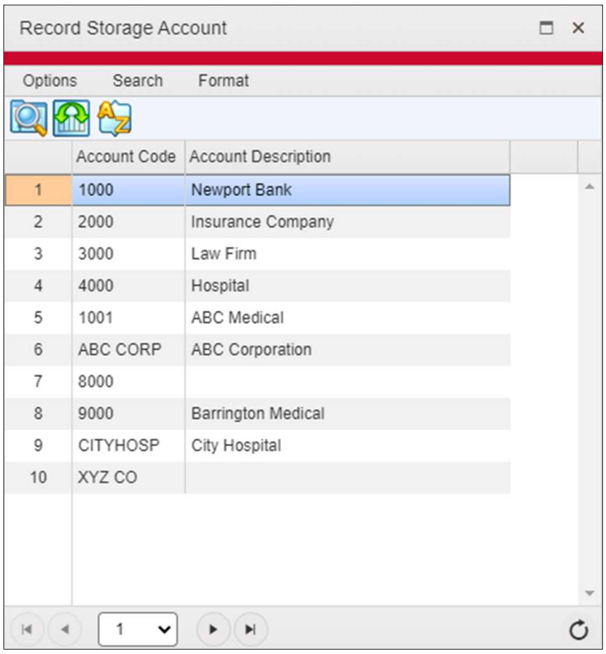


Grid Picker

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

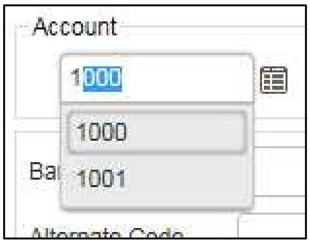


The **Account** grid appears.



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

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

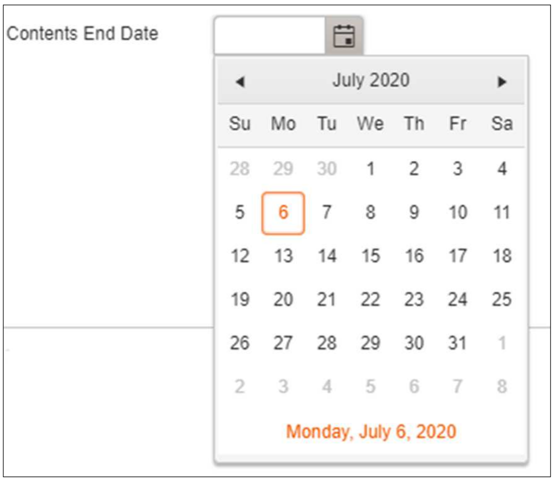


Date/Time Fields

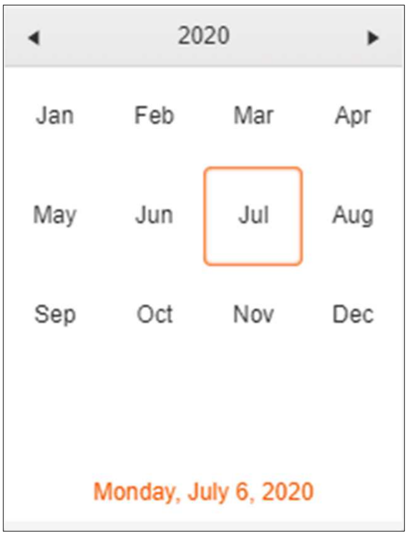
Date and Time fields default to the current date at 12:00 AM. You can enter the date and time, or click the date or time picker.

Date Picker

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



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



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

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

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

Date/Time Picker

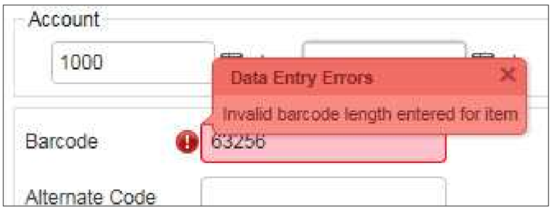
There is also a date/time picker that combines both date and time in the same field.

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

Errors/Warnings

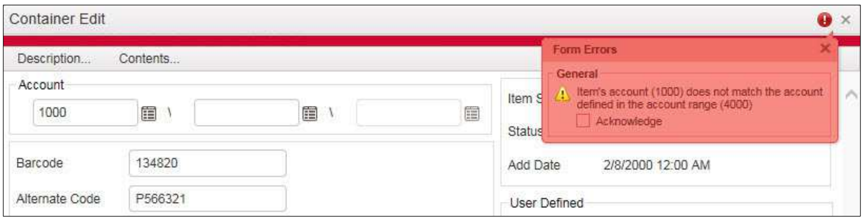
If an invalid entry is made in a field, the field is highlighted in red with an error/warning icon.

Click the icon to view the message.



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

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

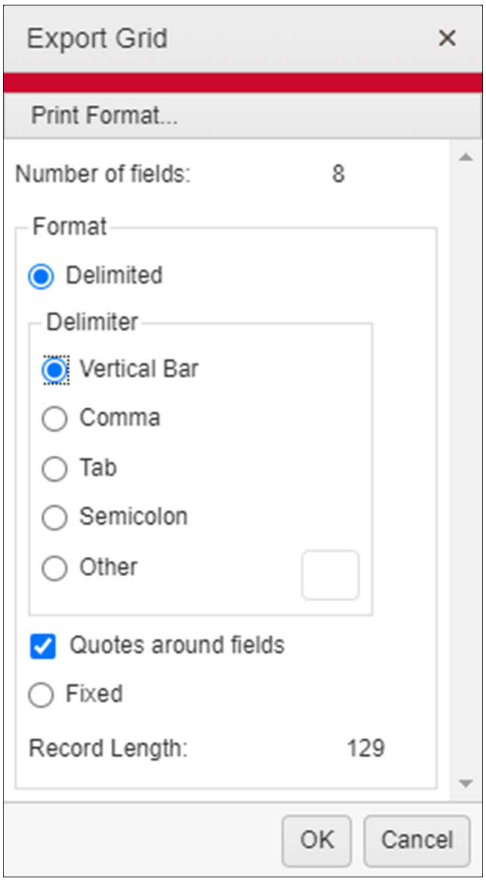


Errors need to be corrected. Warnings do not require action, they just need to be acknowledged. Select the check box to acknowledge the error. Click the **X** in the top right corner to close the message. You cannot save your change until the error has been corrected or the warning has been acknowledged.

Export Grid

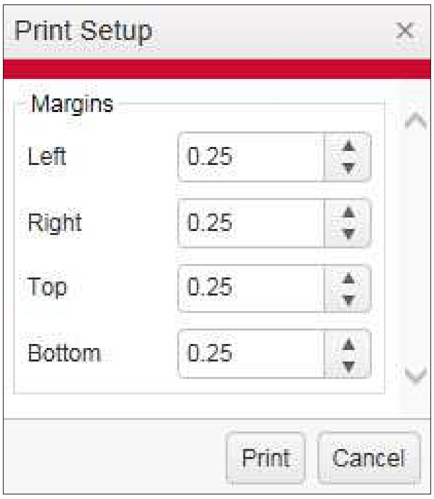
All grids in O'Neil Order have an Export feature. This allows you to export data to a text file that can be viewed in other programs.

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



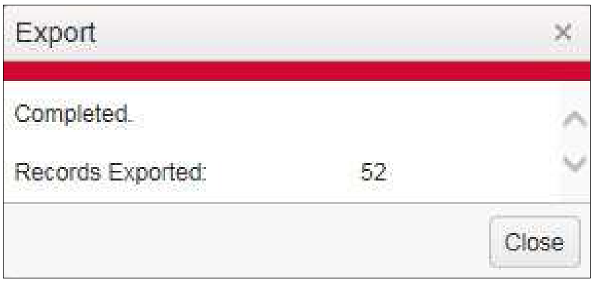
By default, the Delimiter is a vertical bar (|) and the *Quotes around fields* check box is selected. Both settings can be changed.

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



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

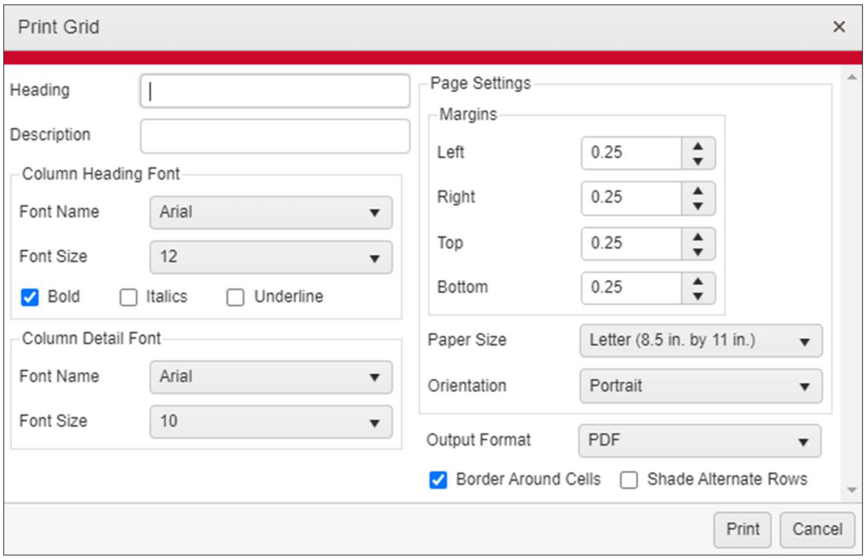
When the export has completed, you are notified of the number of records exported.



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

Print Grid

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



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

Column Heading Font

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

Column Detail Font

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

Page Settings

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

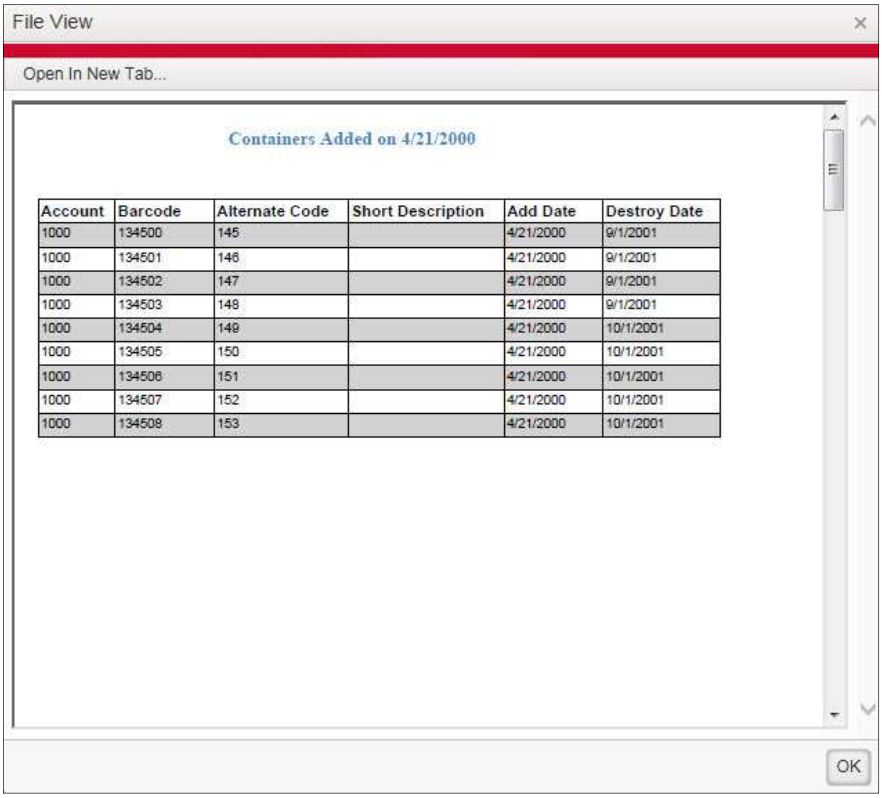
Next, select the Output Format. You can save the grid as a PDF, Microsoft Excel spreadsheet, or Microsoft Word document.

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

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

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

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



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

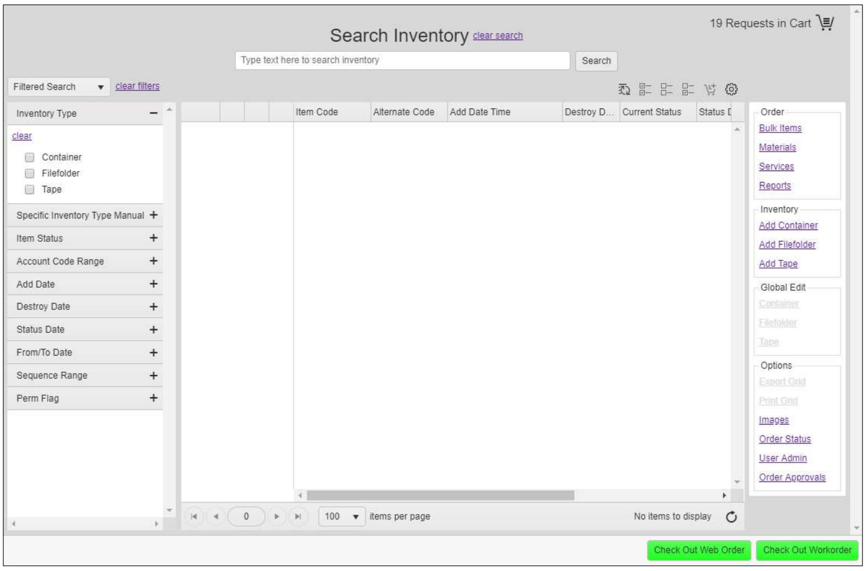
Introduction

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

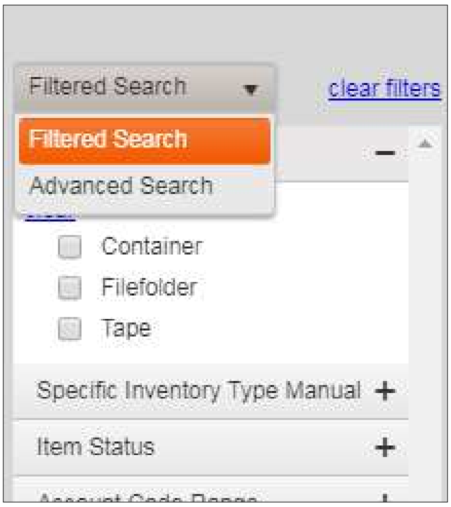
You can add new items at the click of a button, or search for all the existing items that you want to edit. The database at the record center will be searched, and the items that meet your criteria will be loaded onto your screen. Once the items are loaded, you can view and edit fields for an item, or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

Search Inventory

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



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



Filtered Search

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

Search Text Field

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

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

Columns Searched

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

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

- Item Code Alias
- Item Keyword

Supported Searches

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

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

Searches not Supported

The following searches are not supported.

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

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

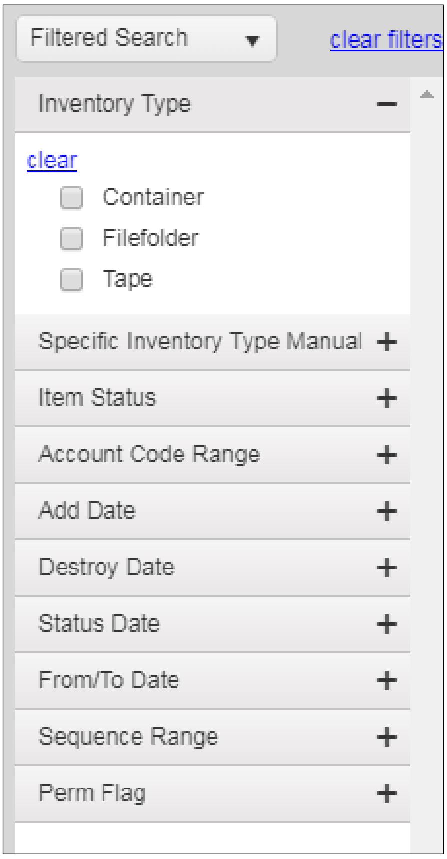
- Searching for individual numbers or characters. These are not indexed by SQL Server's Full Text Search. So searching for *A* will not match items with an "A" in them.
- Searching for one of 116 words that SQL Server's Full Text Search does not index because they are considered too commonly used. These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

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

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

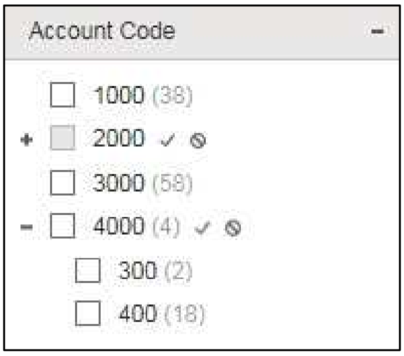
Search Filters

Search filters are used to narrow down your search.



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

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

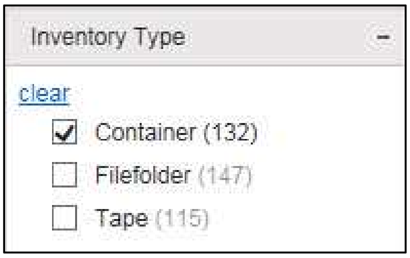


Once a filter is selected, the filter count appears next to each selection. This is the number of items that match the criteria and are included in your results. The **+** and **–** icons can be used to expand or collapse the accounts.

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

Inventory Type

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



Specific Inventory Type

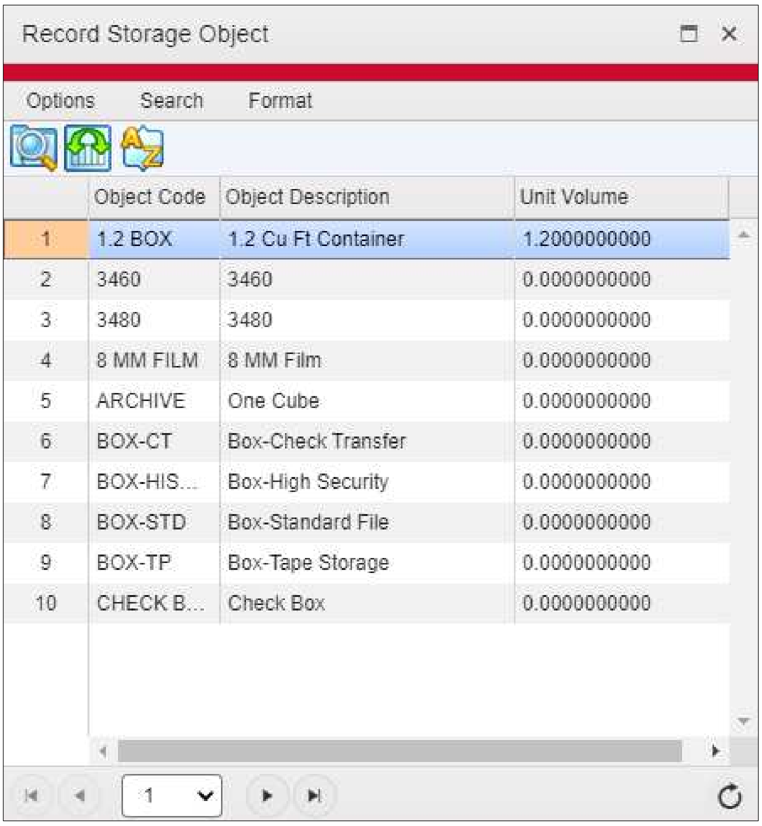
This filter displays all available sub-types of the Inventory Type selected. If Container is the only Inventory Type selected, then only Container sub-types will be displayed here.

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

Specific Inventory Type Manual

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

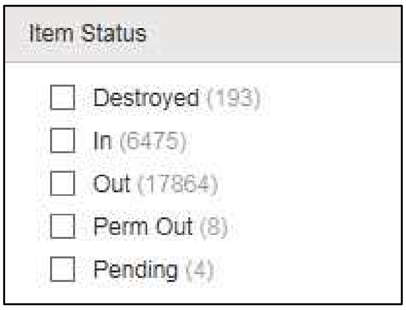
Click the grid picker to display the **Object** grid.



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

Item Status

Select from the available item statuses.



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

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

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

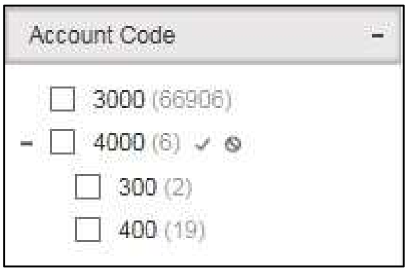
Perm Out: A status of Perm Out means the item was returned to the customer and will not be coming back to the record center.

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

Account Code

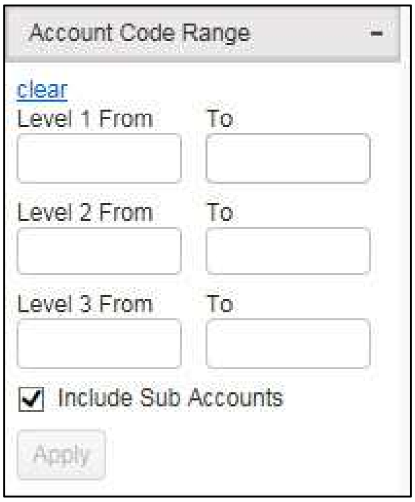
Select from the available accounts/sub accounts. Only accounts that you have access to are displayed.

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



Account Code Range

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

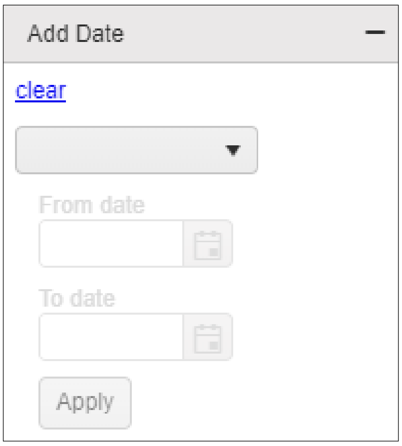


Select the *Include Sub Accounts* check box if you want to include all sub accounts for the account range you entered.

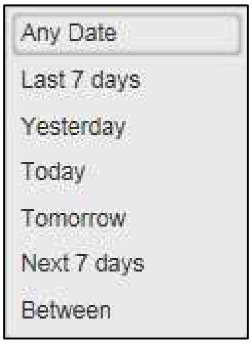
Click **Apply** to include the account code range in your search.

Add Date

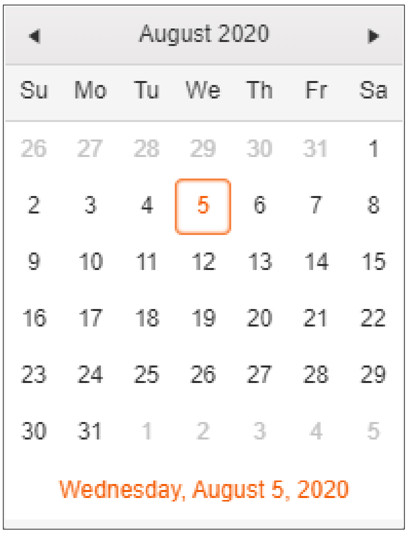
Add date is the date an item was added to the database. To include an Add Date in your search, click the drop down arrow in the top field.



Select from the available options.



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

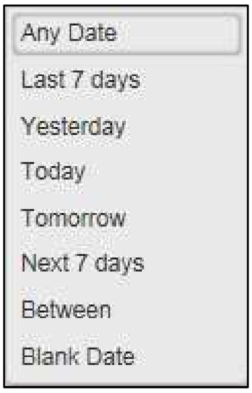


Once you have entered your dates, click **Apply**.

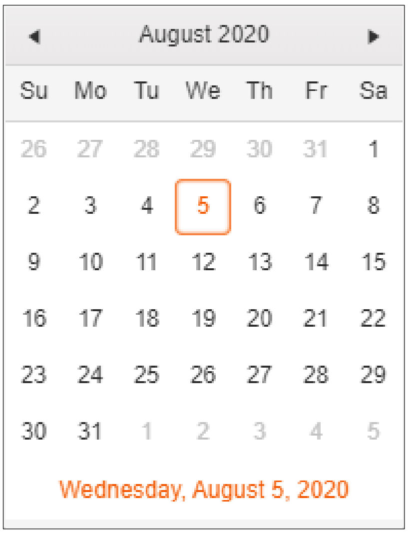
Destroy Date

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

Select from the available options.



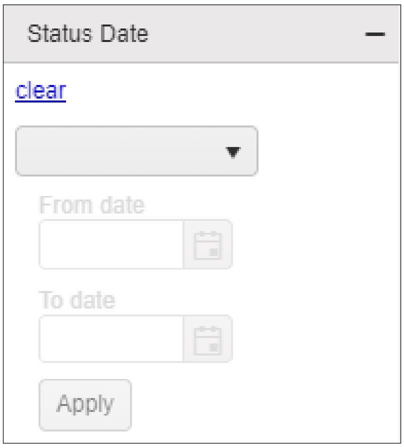
If you select Between, you will need to enter a From/To date. Type in a date, or click the grid picker next to the field to select a date. You can select just a From date or just a To date. It is not necessary to enter both.



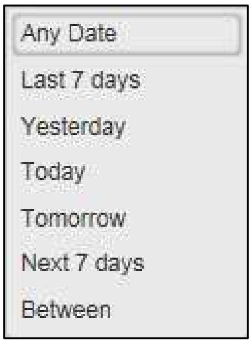
Once you have entered your dates, click **Apply**.

Status Date

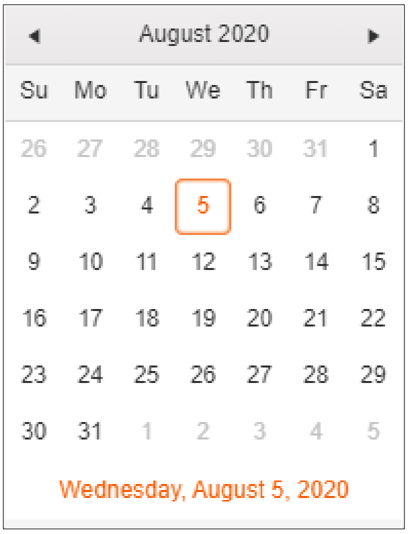
Status date is the date the last action took place for the item. For example, it could be when the item was scanned into the record center, or scanned out to a customer. To include a Status Date in your search, click the drop down arrow in the top field.



Select from the available options.



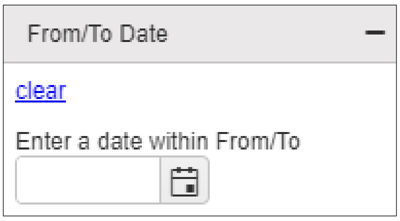
If you select Between, you will need to enter a From/To date. Type in a date, or click the grid picker next to the field to select a date. You can select just a From date or just a To date. It is not necessary to enter both.



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

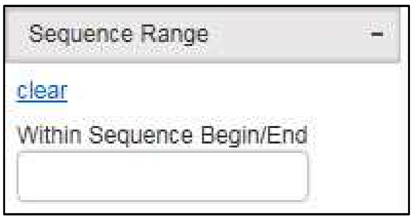
From/To Date

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



Sequence Range

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



Perm Flag

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

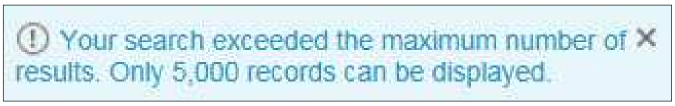
Clear Filters

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

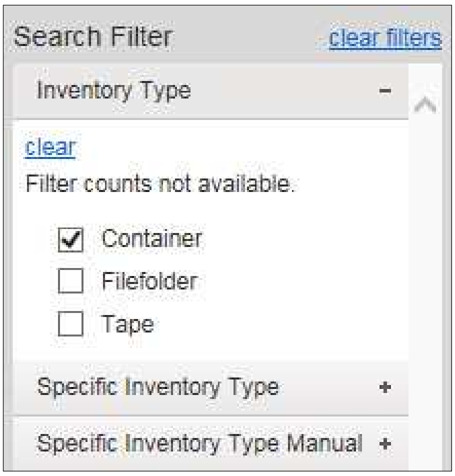
At the top of the Search Filter section is a **Clear Filters** link that clears all filters. All results displayed in the grid that are based on the filters will be cleared.

Result Limit Exceeded

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



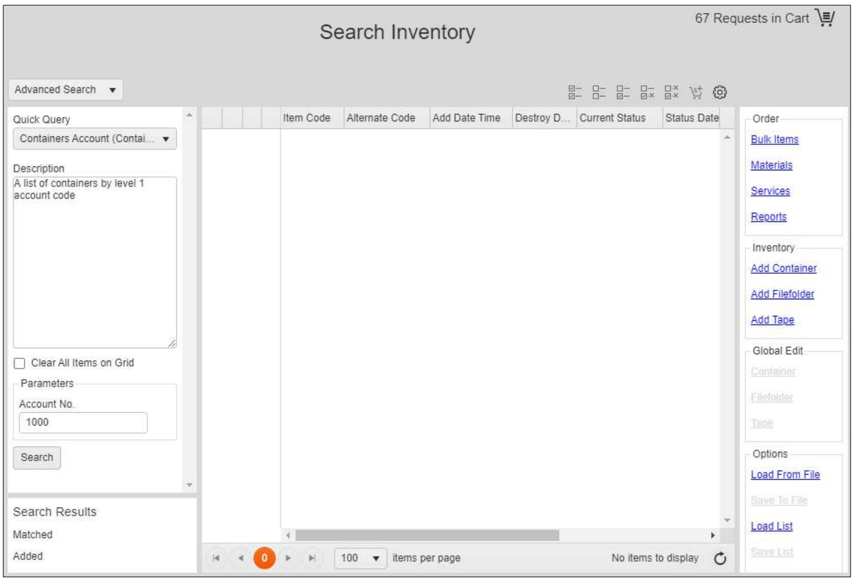
Filter counts will not be available until you apply additional filters to narrow the results. Any time filter counts are not available, a note is included in the Search Filter section.



Advanced Search

Advanced Search displays the Quick Query panel.

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



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

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

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

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

Click **Search** to run the query.

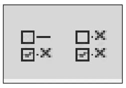
NOTE: If you add a container, filefolder, or tape while in the Advanced Search mode, the row is added to the grid.

Search Results

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

Icons

Two additional icons are displayed in the Advanced Search mode.

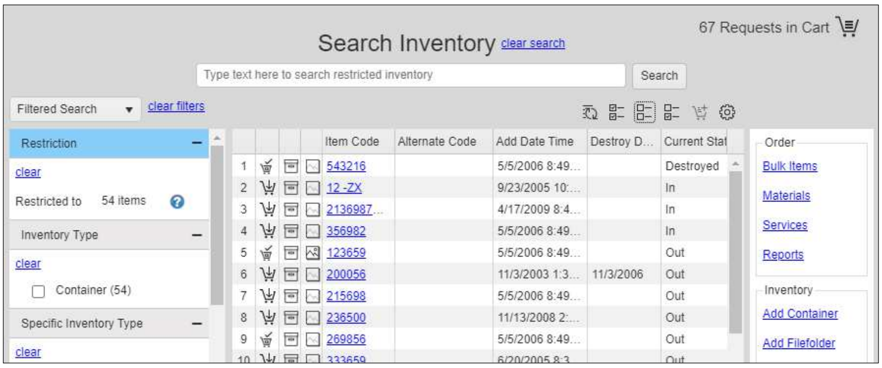


Clear Selected: removes all selected items from the grid.

Clear All: removes all items from the grid.

Switch from Advanced to Filtered Mode

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



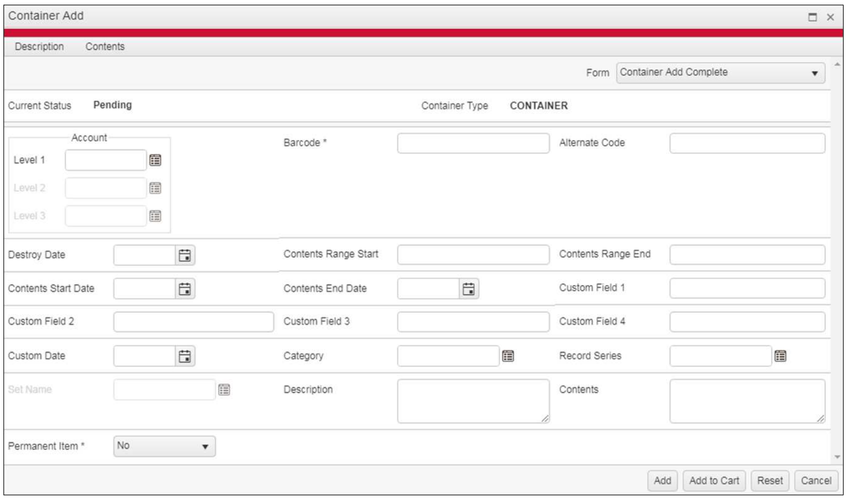
A Restriction panel is displayed at the top of the Search Filters panel. It indicates the number of items from the last Advanced Search that the results are restricted to. The panel title is blue to bring attention to it. A **Help** icon is also included. Hover over the icon to display a message explaining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

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

Add Container

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

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

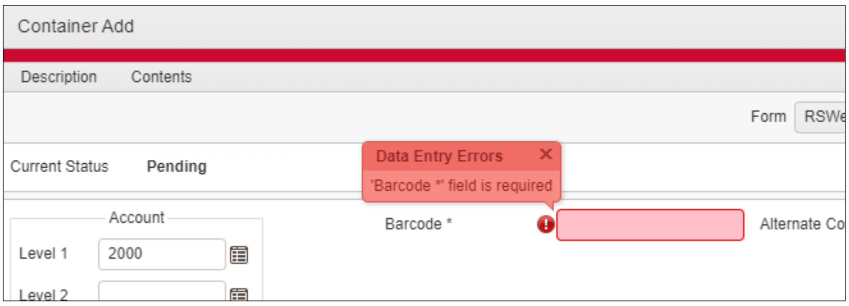


Your record center may have created custom data entry forms for you. To view available forms, click the Form drop down list and make your selection. The default is automatically set to the last form you opened.

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

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

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



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

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

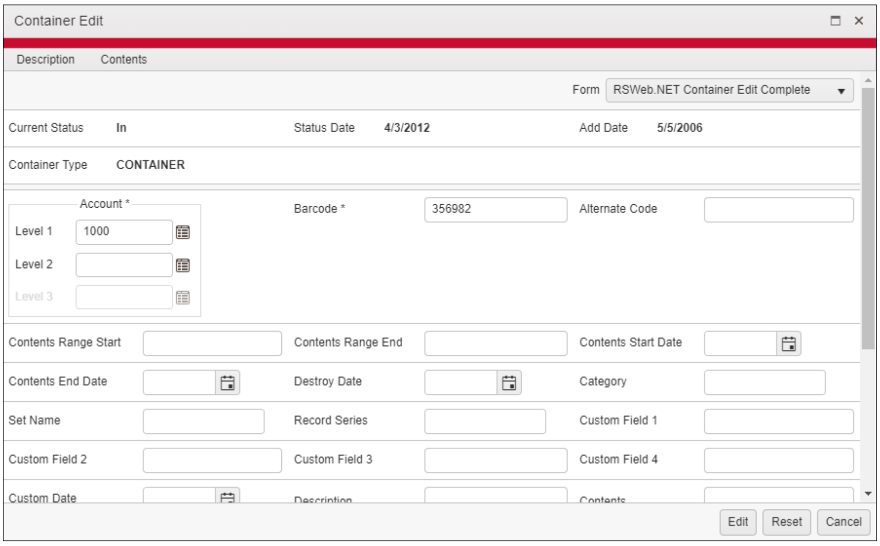
Continue adding any additional containers. When you have finished entering data, click **Cancel** to return to the **Results** grid.

Edit Existing Containers

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

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

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



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

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

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

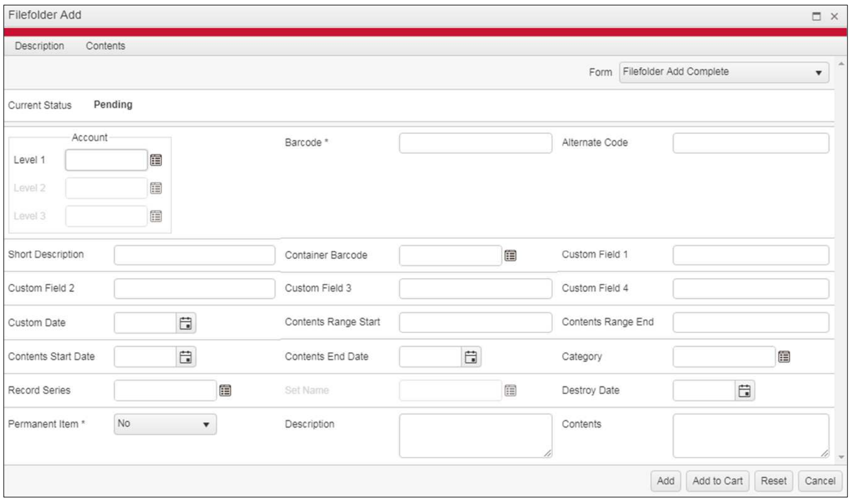
Once you have completed the fields, click **Edit**.

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

Add Filefolder

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

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

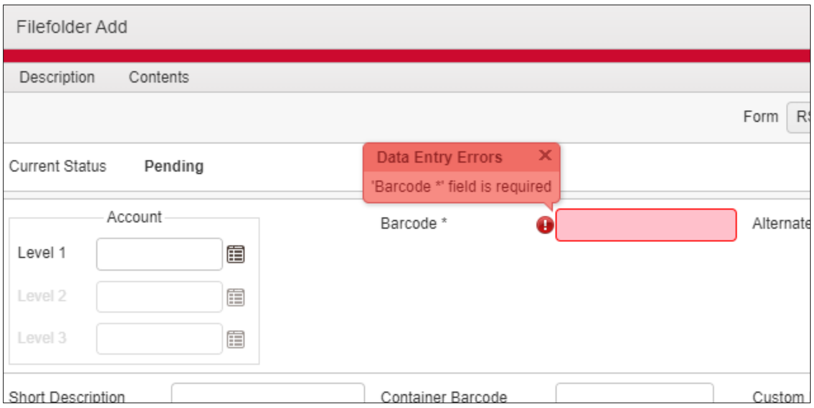


Your record center may have created custom data entry forms for you. To view available forms, click the Form drop down list and make your selection. The default is automatically set to the last form you opened.

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

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

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



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

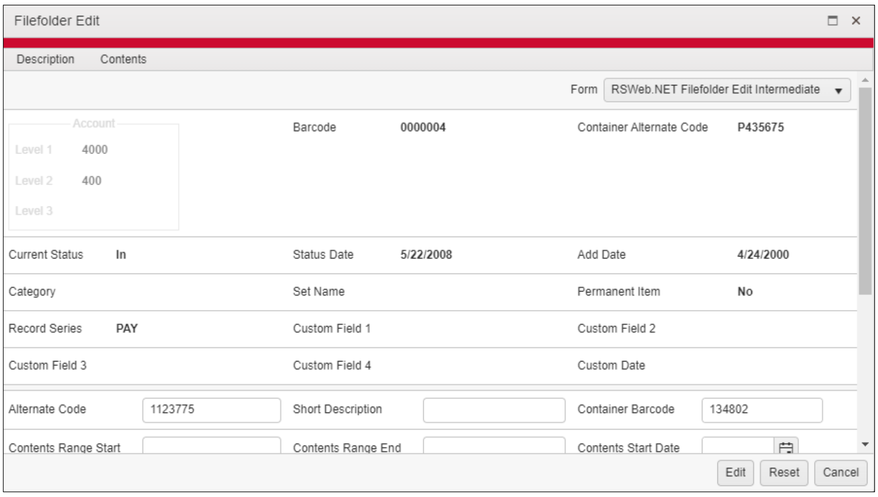
Continue adding any additional filefolders. When you have finished entering data, click **Cancel** to return to the **Inventory** grid.

Edit Existing Filefolders

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

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

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



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

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

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

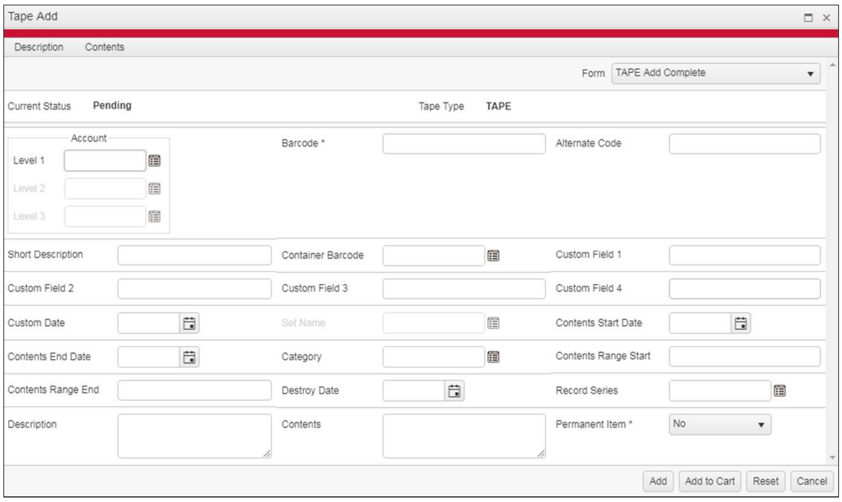
Once you have completed the fields, click **Edit**.

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

Add Tape

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

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

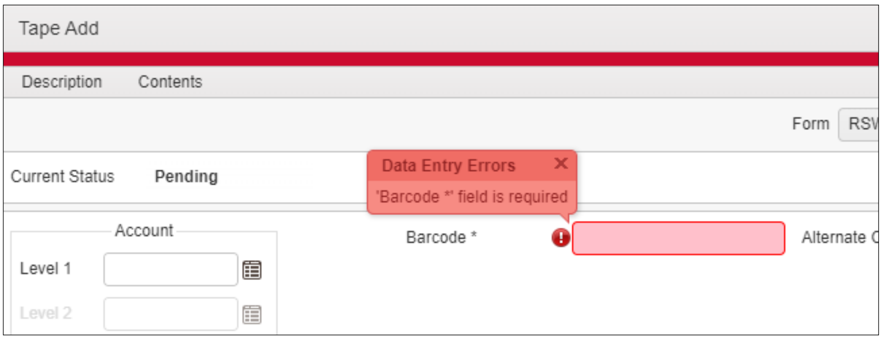


Your record center may have created custom data entry forms for you. To view available forms, click the Form drop down list and make your selection. The default is automatically set to the last form you opened.

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

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

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



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

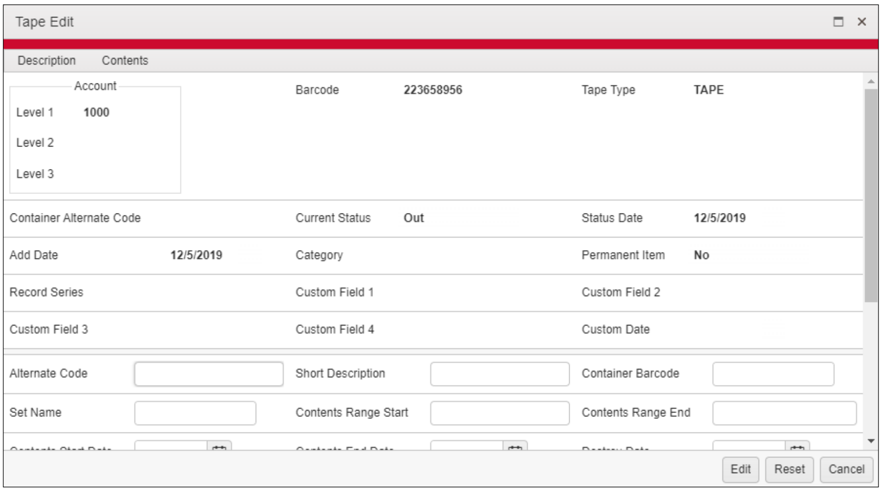
Continue adding any additional tapes. When you have finished entering data, click **Cancel** to return to the **Inventory** grid.

Edit Existing Tapes

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

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

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



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

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

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

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

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

Retention Information

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

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

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

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

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

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

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

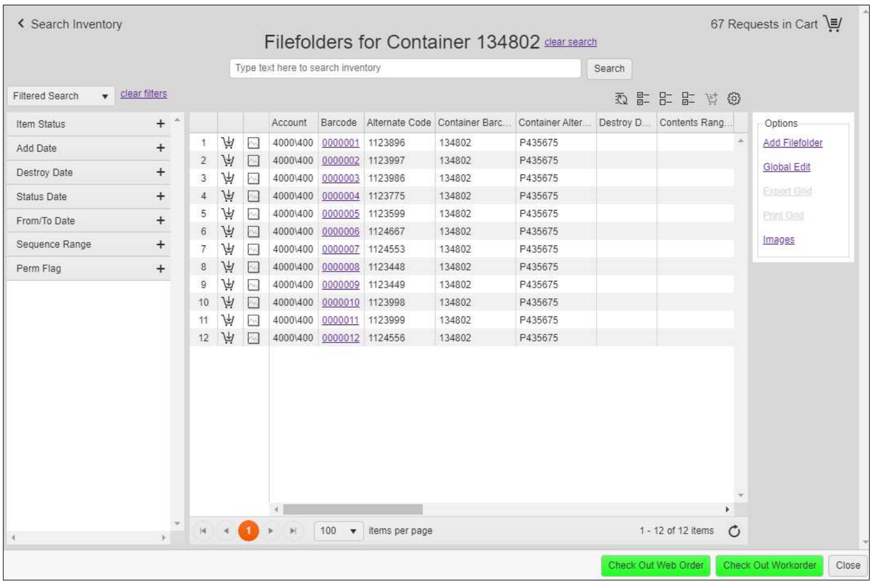
If you select **No**, the record will be saved with the current Destroy Date and Permanent Flag setting.

Filefolders/Tapes in Container

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

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

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

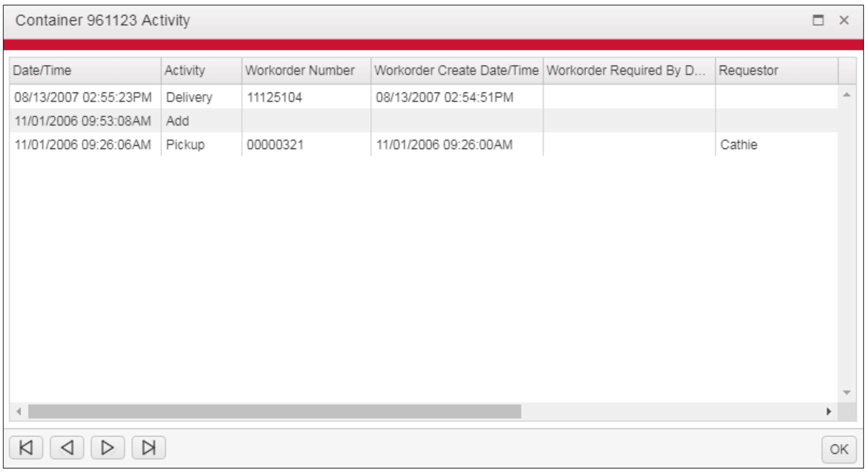


When viewing filefolders/tapes for a single container, you cannot edit the contained-in container. The Container and Account fields are populated and grayed out when the dialog box opens. When adding, you can only add to the container you are viewing the filefolders/tapes for.

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

View Item Activity

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



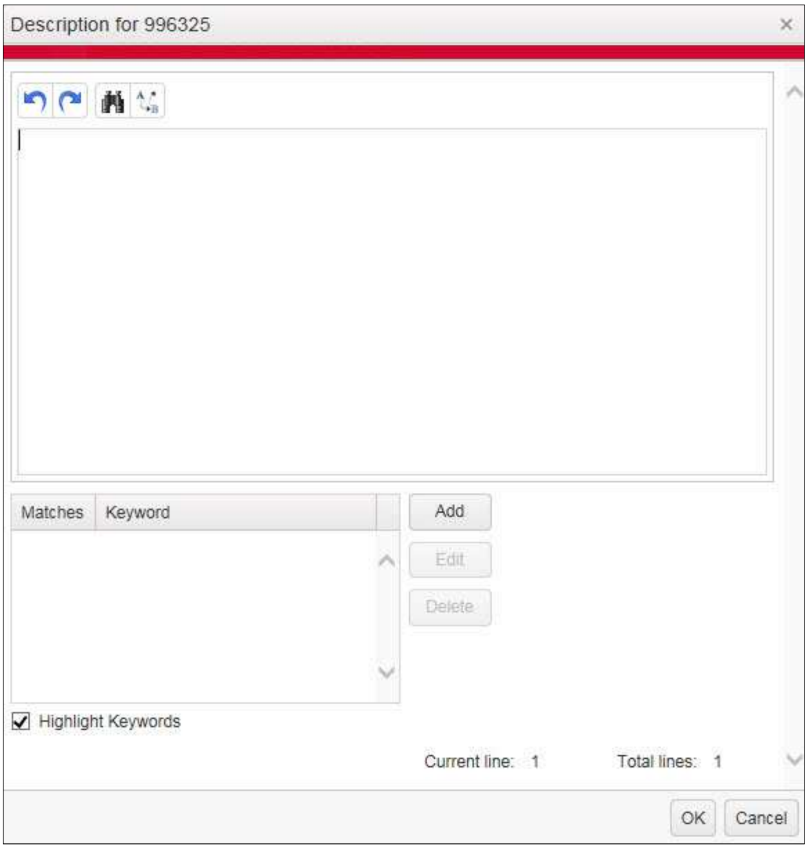
NOTE: Item activity is sorted by Date/Time in descending order and up to 20 records of activity are displayed.

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

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

Description

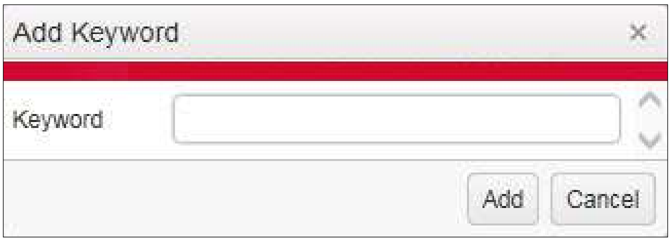
Each item in the system can be given a unique description. To enter the description, in the item's **Add** or **Edit** dialog box, click **Description**.



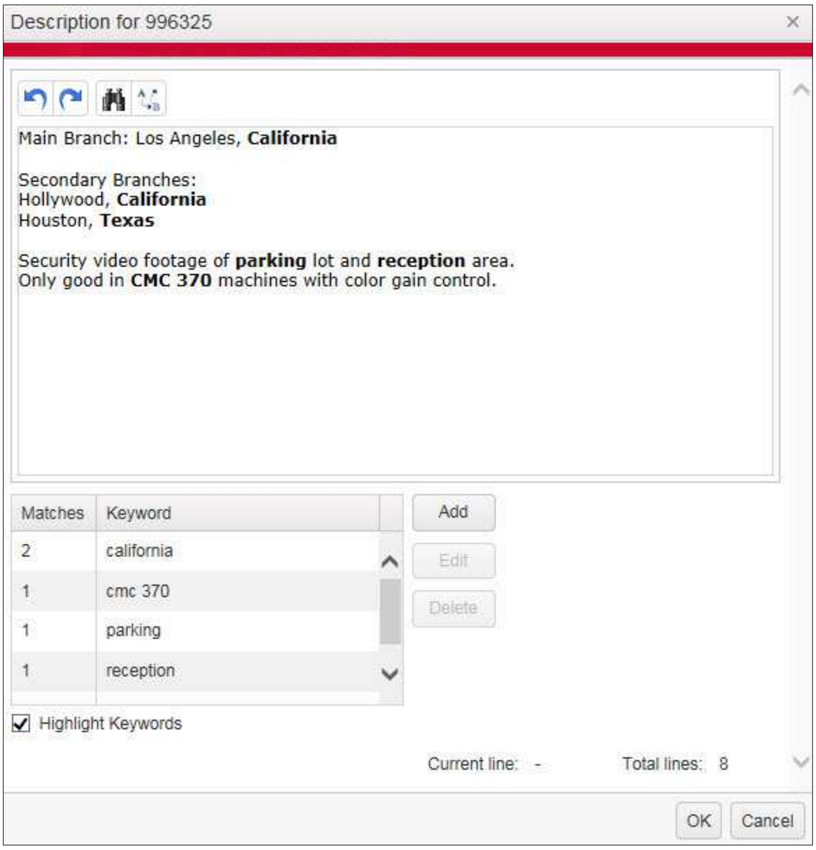
Description text is entered in the top section. The current line being edited and the total number of lines are displayed in the lower right corner.

Keywords

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



Type your keyword and click **Add**.



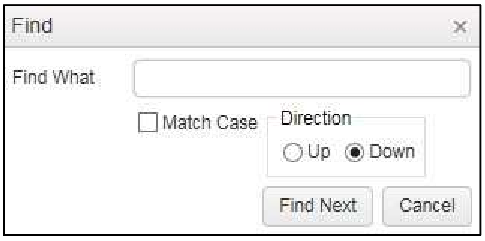
The keyword list includes a count of the number of times the keyword appears within the description text. Keywords do not have to appear in the text. Keywords that do not appear in the text have a zero match count in the keyword list. Existing keywords can be edited or deleted.

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.

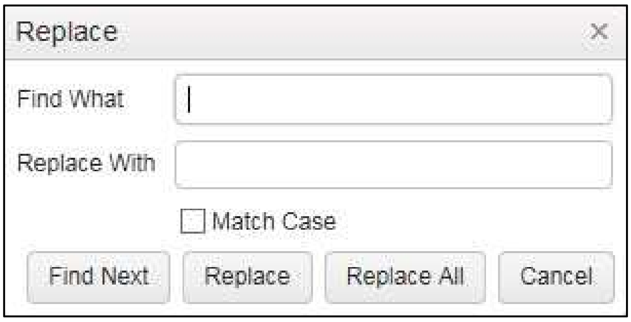


You can choose to match the case of the text and also choose to search up or down. Click **Find Next**. When you have finished, click **Cancel** to close the dialog box.

Find and Replace

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

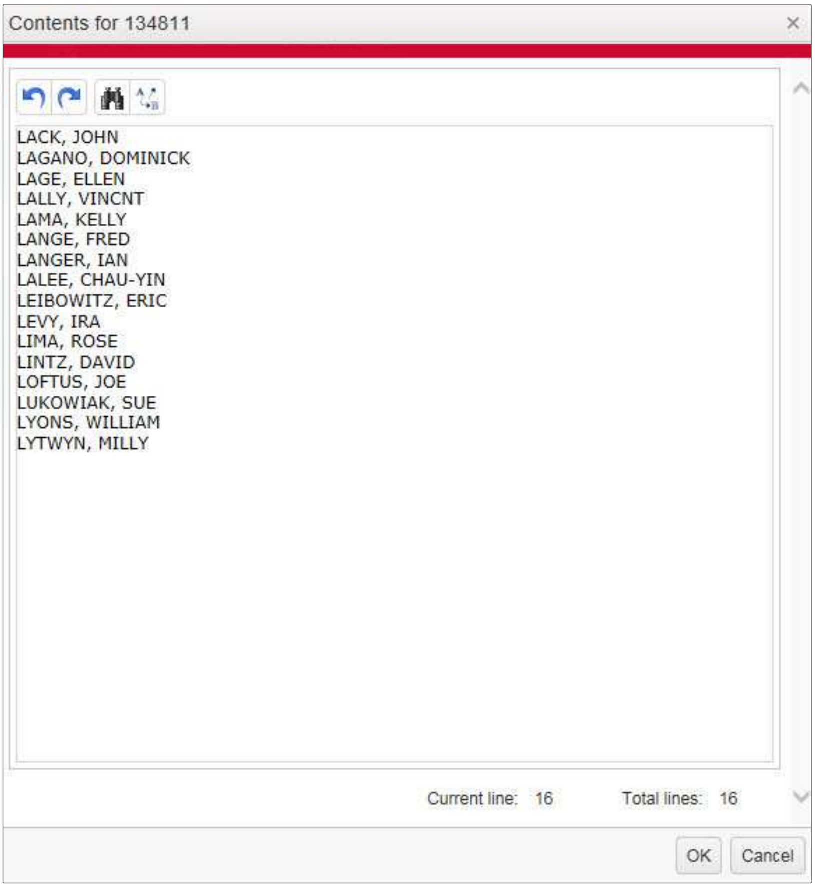
Enter the text you want to find and the text you want to replace it with. You can choose to match the case of the text.



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

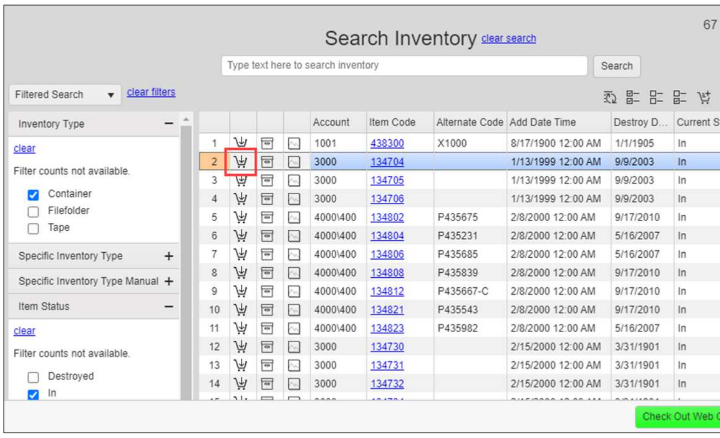
In the **Contents** dialog box you can enter the name of each item within another item. For example, you could list the name of each file stored in a container, or list the documents contained in a filefolder. To enter the contents, in the item's **Add** or **Edit** dialog box, click **Contents**.



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.

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.

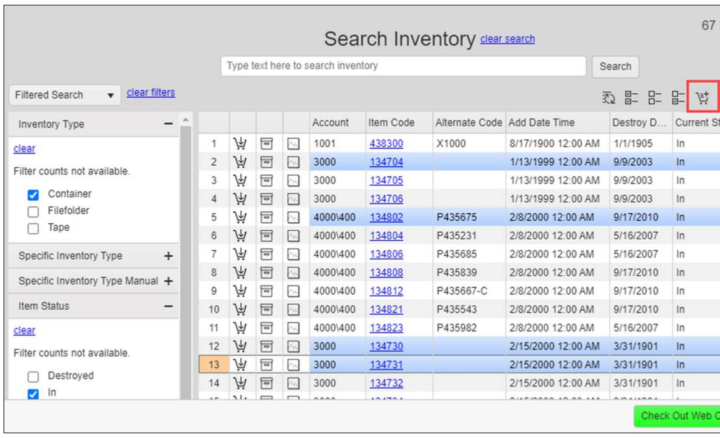
The **Cart** link in the top right corner of the screen shows the number of requests in the cart and provides quick navigation to the **Cart** grid.

Add Requests to Cart

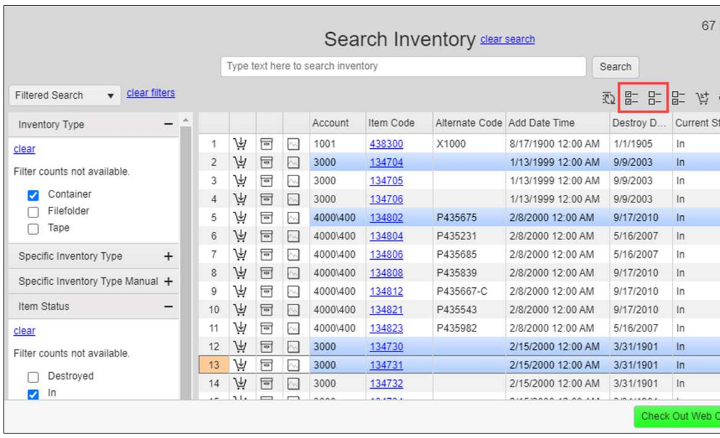
Containers, Filefolders, and Tapes

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**.



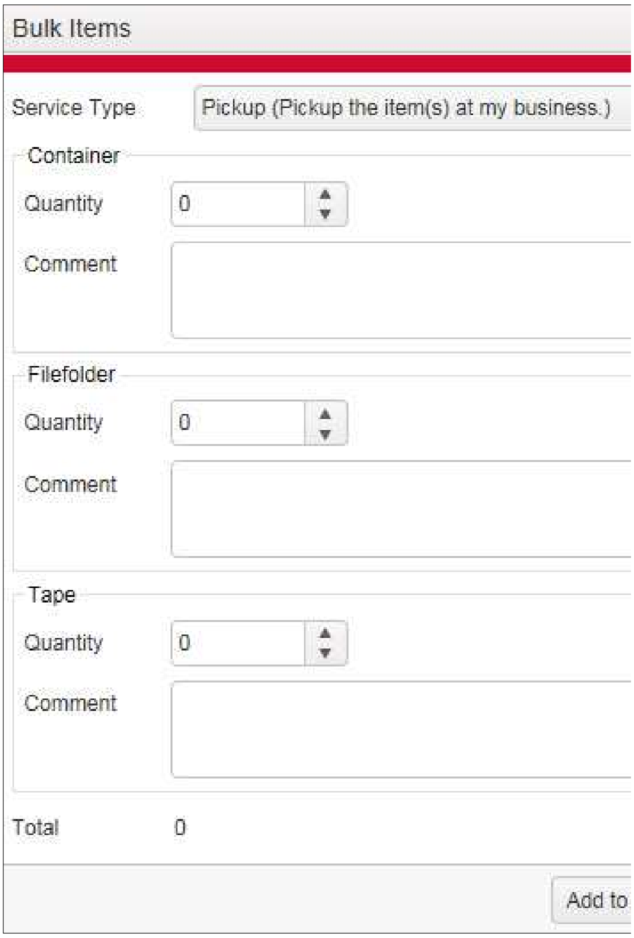
To select or unselect all items in the grid, use the **Select All** or **Unselect All** icons. You can also right click in the grid and from the context menu, select **Select All**, or **Unselect All**.



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.

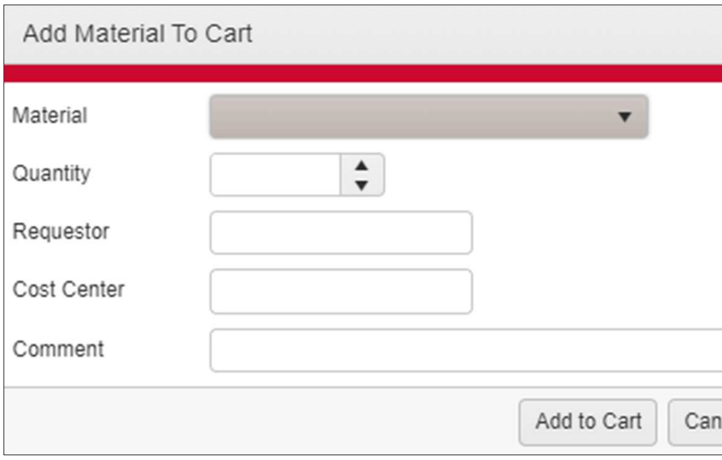
Total: The total number of items displays at the bottom of the dialog box.

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.

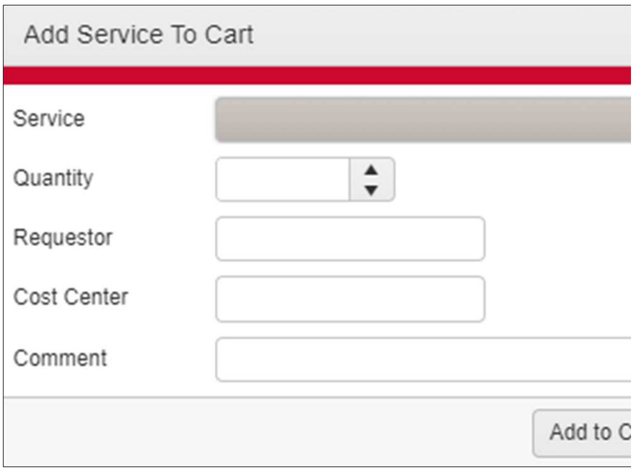
Comment: Enter any additional comments you want the record center to receive.

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.

Order/Workorder

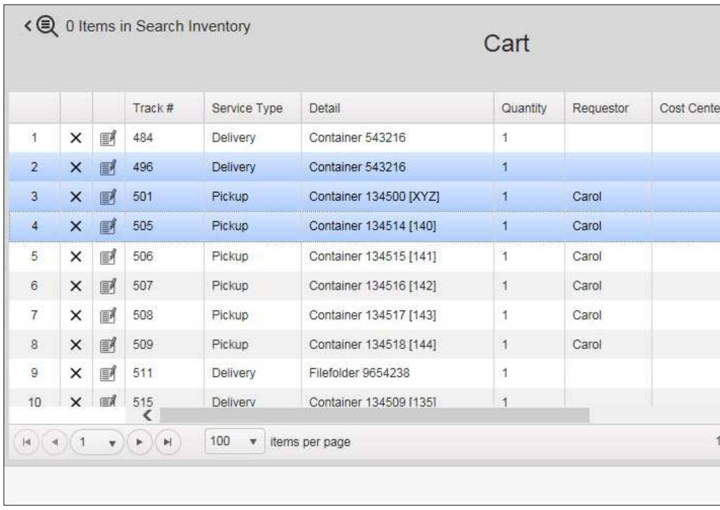
Once you have added requests to your cart, you are ready to check out. This is what actually sends your request to the record center.

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

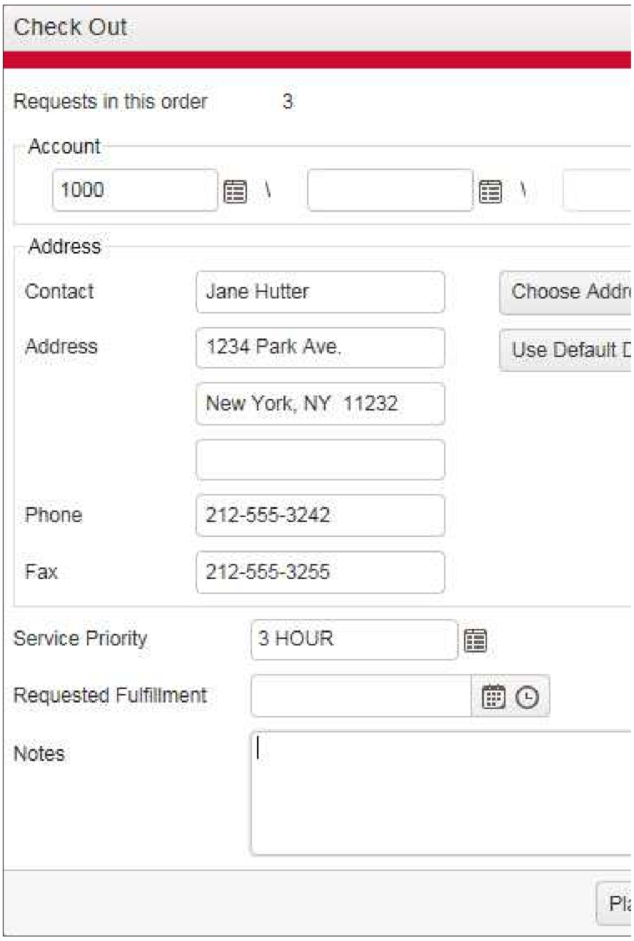
Each request you add to the cart is given a tracking number. Once you create an order or workorder, a batch order number is assigned to that group of requests. A batch can have one or a number of requests assigned to it. Your record center will discuss with you how it uses batches and together you can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

Check Out Web Order

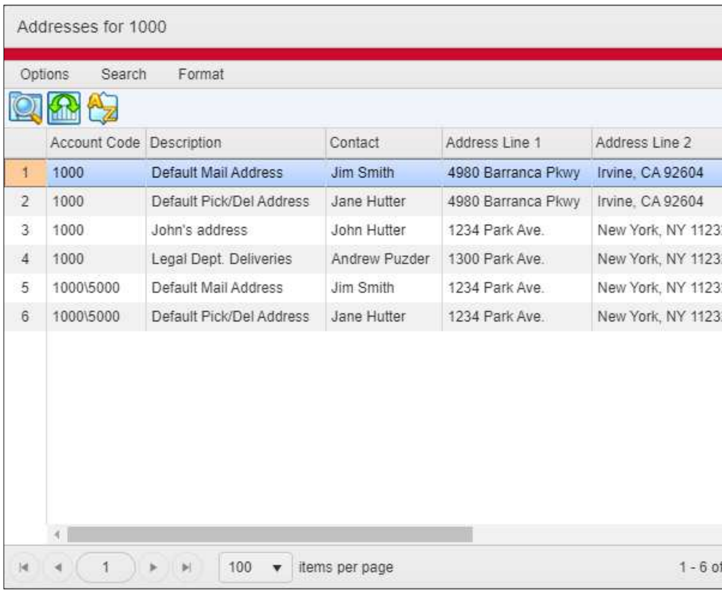
Select the requests in the cart that you want included in the order.



Click **Check Out**.



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



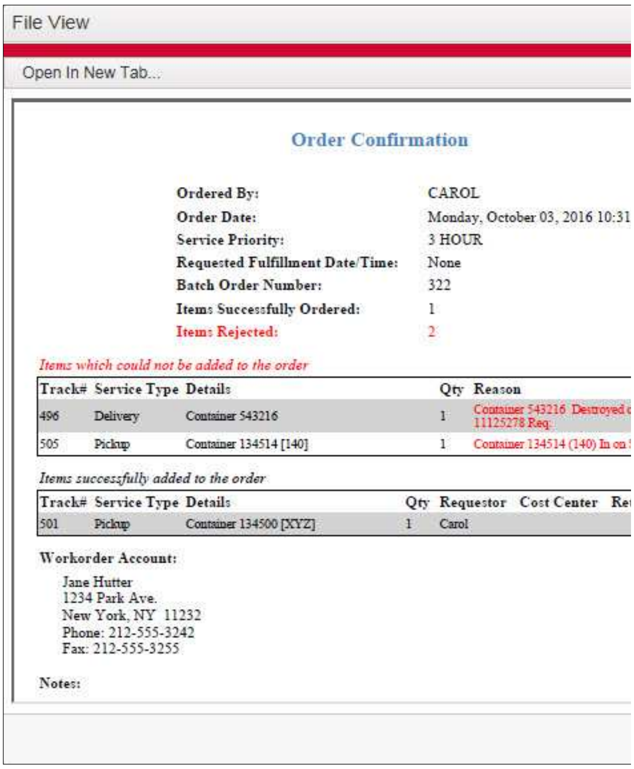
Right click on the address you want and select **OK**. The address fields are automatically populated.

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

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

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

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

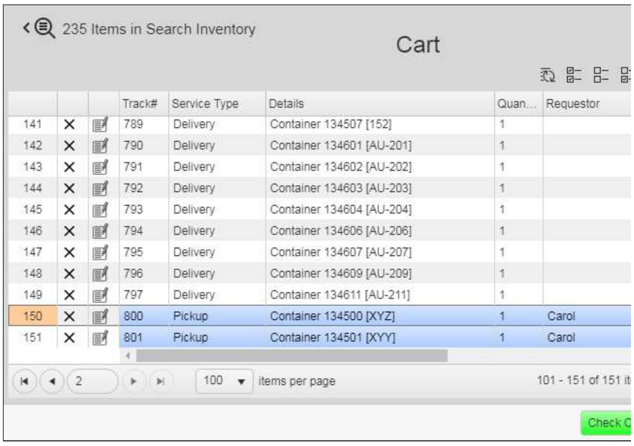


Click **Open In New Tab** to view the confirmation in a full screen. Click **OK** to close the summary and return to the cart.

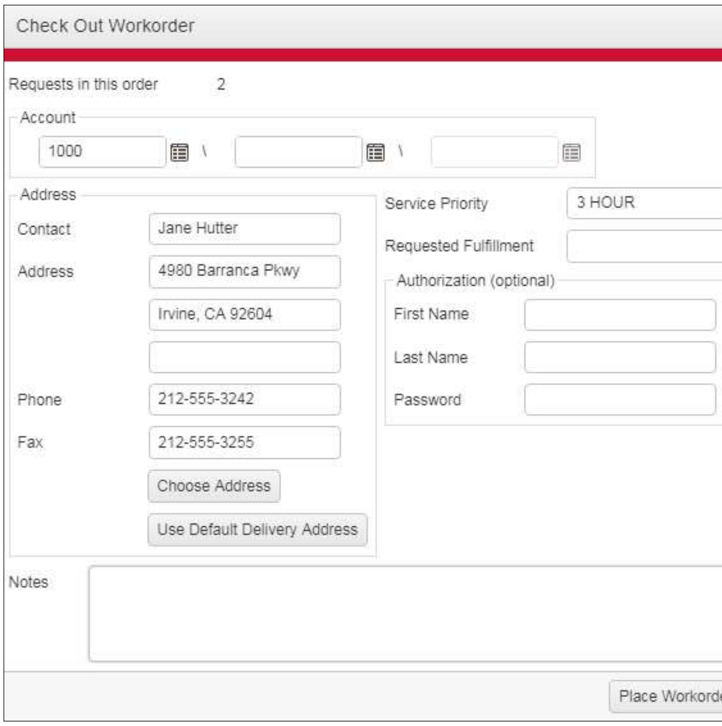
The requests have been removed from the cart. The order has been sent to the record center. They will post the requests to a workorder and fulfill your order.

Check Out Workorder

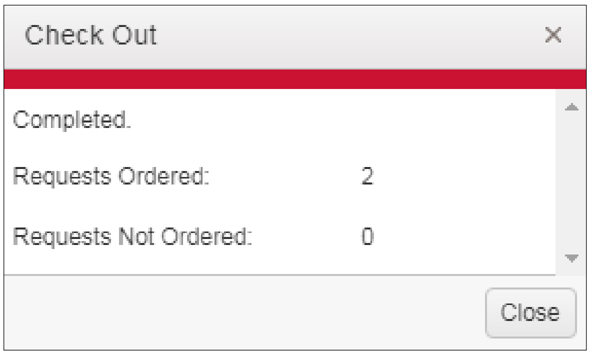
Select the items in the cart that you want included the same as you would for a web order.



Click the **Check Out Workorder** button.



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



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

Workorder Confirmation

Ordered By:	CAROL
Order Date:	Tuesday, March 12, 2019 10
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
800	Pickup	Container 134500 [XYZ]	1	Carol	310
801	Pickup	Container 134501 [XYY]	1	Carol	310

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.