

# What's New

Strato Version 2.4



- 1 INTRODUCTION ..... 3**
- 2 NOAH COMPLIANCE ..... 4**
- 3 STRATO BUSINESS UNITS ..... 5**
  - 3.1 General Information ..... 5
  - 3.2 Creating business units ..... 6
  - 3.3 Assigning resources to business units ..... 8
  - 3.4 Moving offices to another business unit ..... 10
  - 3.5 Moving users to another business unit ..... 14
  - 3.6 Deleting business units ..... 16
- 4 ROLES AND PERMISSIONS ..... 17**
  - 4.1 New Quick Search permissions ..... 17
  - 4.2 Export permissions per module ..... 18
  - 4.3 Permission to view Dashboard ..... 19
  - 4.4 Easy way to copy roles ..... 20
  - 4.5 Multiple roles per user ..... 21
- 5 OTHER IMPROVEMENTS ..... 22**
  - 5.1 Overpayment enhancement ..... 22
  - 5.2 Possible to set status for stock item returned to the shop ..... 23
  - 5.3 Redesigned UI for client search by birth date in Client EXPLORE ..... 24
  - 5.4 Primary office is mandatory ..... 24
- 6 ADDITIONAL INFORMATION ..... 25**

# 1 Introduction

The purpose of this document is to give you an overview of the new and modified features in Strato 2.4.

The available languages are English UK, Danish, Swedish, Norwegian, Spanish, Polish, Mandarin (Traditional), Finnish, and German. Strato v.2.4 is certified to NOAH 4 and works with Noah v.4.9.

## 2 Noah compliance

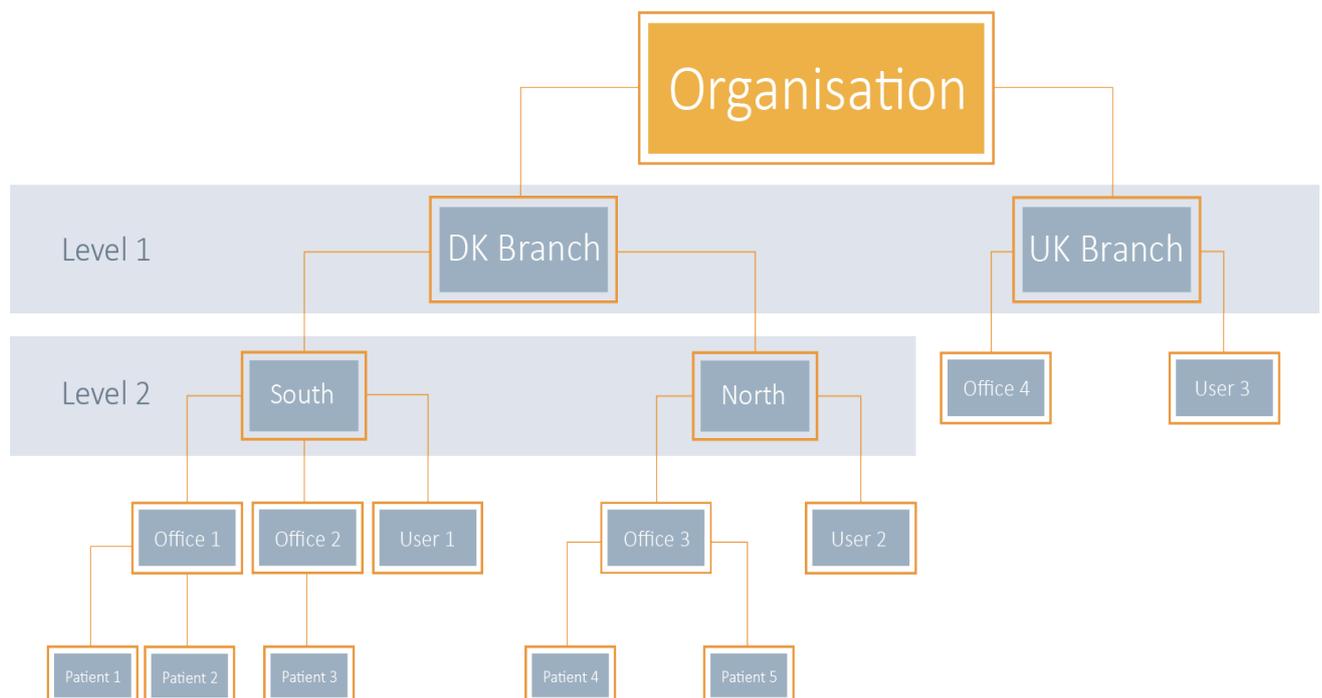
Strato is certified for Noah v4.9. Please find the certification status at [HIMSA](#) page.

Strato will automatically update Noah to v4.9 when installing or updating Strato.

## 3 Strato Business Units

### 3.1 General Information

Strato introduces business units which help you organise your audiological shops by grouping offices and users - due to financial, security, and reporting reasons. Business units provide you with an easy way to introduce data isolation between users. While previously all users could see data throughout organisation, now they will only have access to data on the level of their business unit and beneath it. The diagram below is just one example of how you can assign your offices and users to different business units.



On the top of the hierarchy is always **Organisation**. You can then proceed and create the first level of business units - in our case these are **DK Branch** and **UK Branch**. For each of these Level 1 business units you can create any amount of Level 2 business units - e.g. **South** and **North** for **DK Branch**.

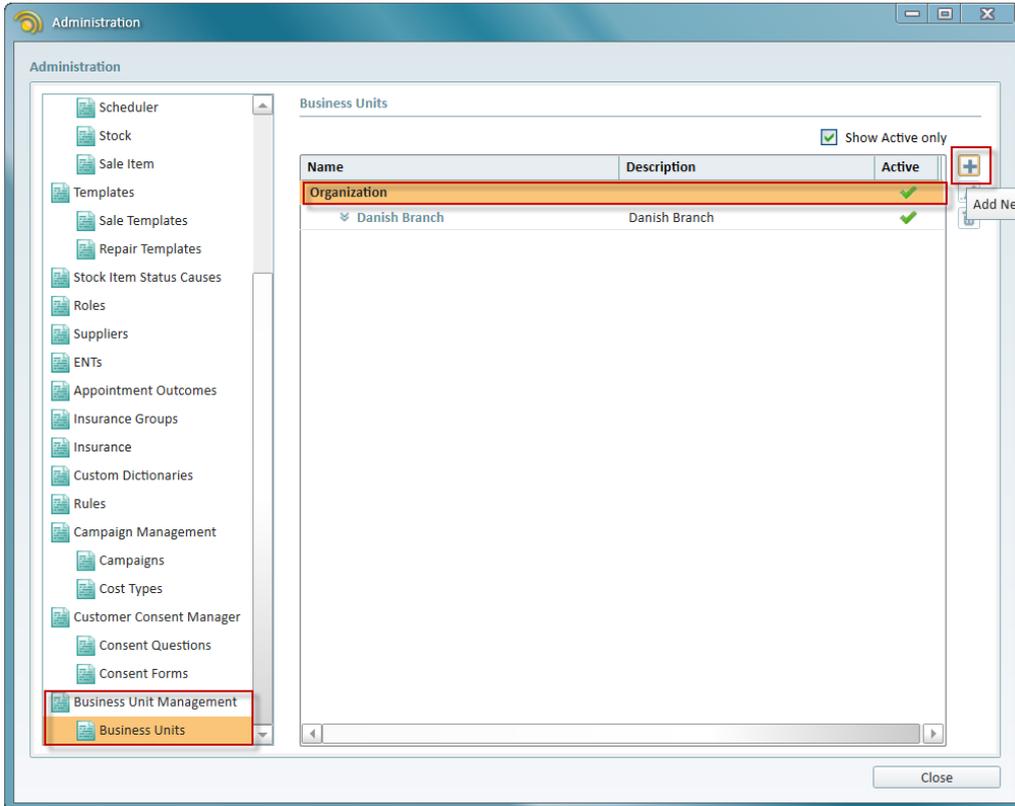
**Note:** The maximum nesting level of business units in Strato is not more than two. This means you cannot assign business units to, for instance, **South** in the **DK Branch**.

You can assign users and offices to any business unit, including the top one which is **Organisation**.

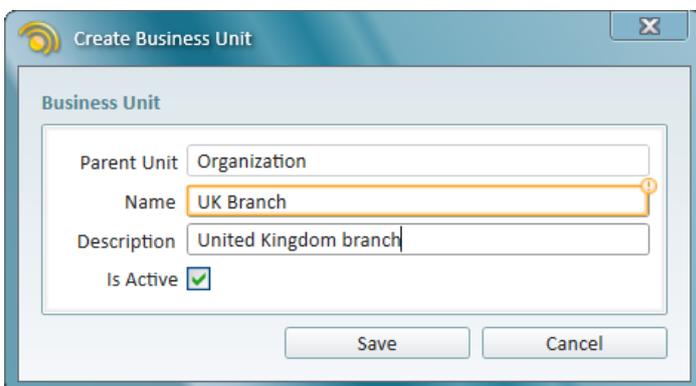
### 3.2 Creating business units

To create business units:

1. Go to **Tools > Administration > Business Unit Management > Business Units**.
2. The top level is always **Organisation**. Let us create the business unit by clicking the **Add New** button.

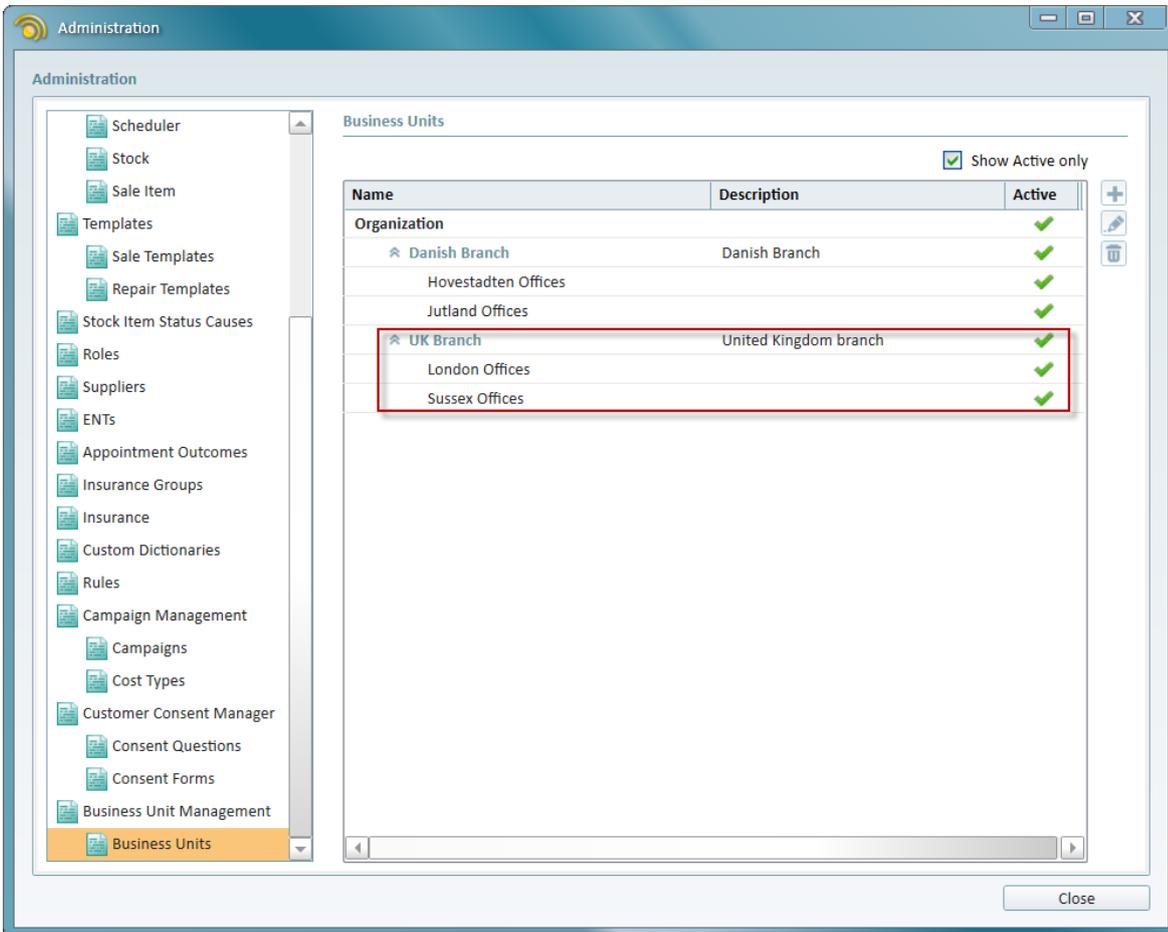


3. In the *Create Business Unit* window, specify the name and description for the new unit, then ensure **Is Active** is selected.

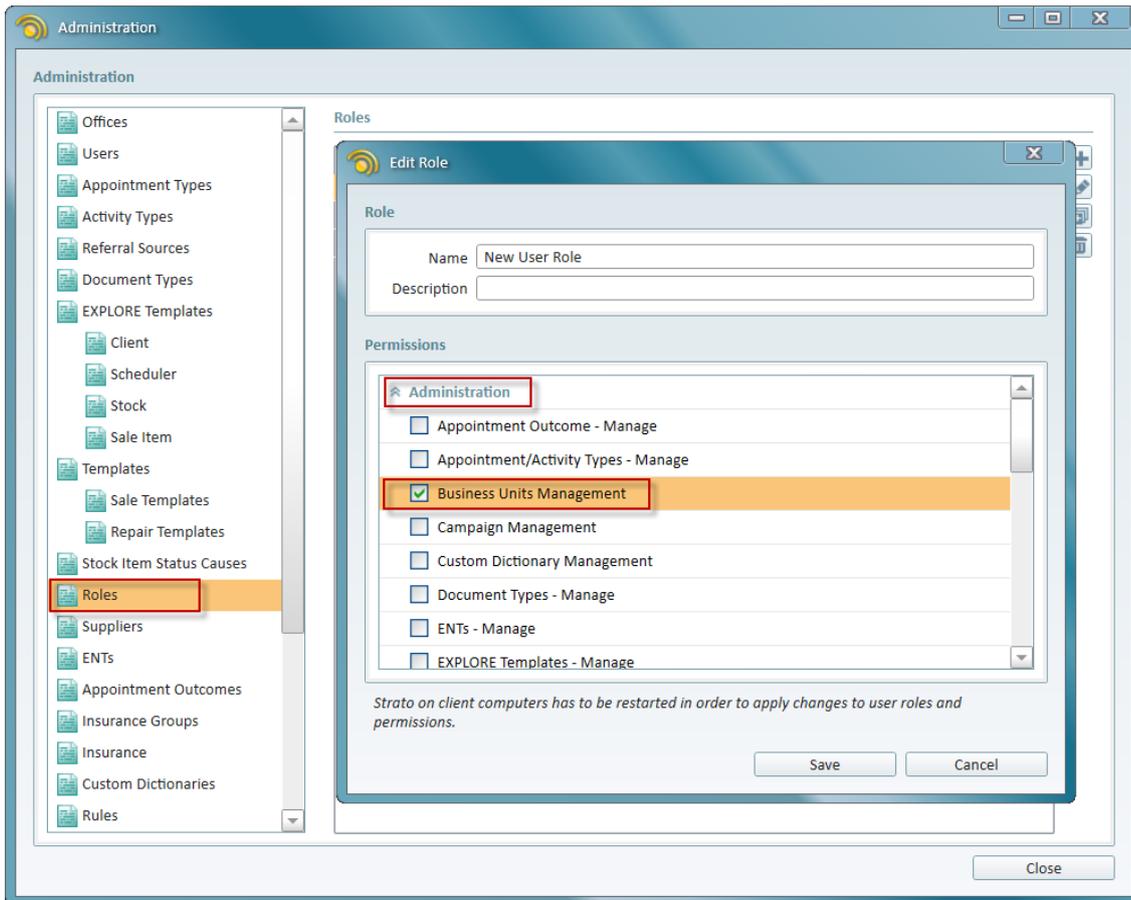


4. Click **Save**.

Next, we can create Level 2 business units. In our case we add **London Offices** and **Sussex Offices** to **UK Branch**. To do this, click **UK Branch** in the list and then proceed to creating more business units as described above. Our business unit structure could look in the following way:



**Note:** Users need to have a special permission to manage business units in Strato. To enable it, go to **Tools > Administration > Roles** and start editing the role. Under **Administration**, select **Business Units Management**.



### 3.3 Assigning resources to business units

There are two types of Strato resources that you can assign to business units:

- Users
- Offices

A user or an office can be part of only one business unit at a time. As you create a new user, you can assign it to any business unit.

**Create New User**

**Account Data**

Login

Password

Confirm Password

Role

*Strato on client computers has to be restarted in order to apply changes to user roles.*

User Status

**Business Unit**

Organization

Organization

Danish Branch

Hovestadten Offices

Jutland Offices

UK Branch

**London Offices**

Sussex Offices

**Personal Data**

User Initials

First Name

Last Name

Mobile Phone

The same applies to a newly created office.

**Create New Office**

**Office Data**

Office Name

Address Line1

Phone

Address Line2

Email

Address Line3

Is active

City

**Business Unit**

Postcode

Notes

Organization

Danish Branch

Hovestadten Offices

Jutland Offices

UK Branch

London Offices

**Sussex Offices**

**Working Hours**

Day of the week	From	To	Closed
Monday	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>
Tuesday	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>
Wednesday	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>
Thursday	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>
Friday	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>
Saturday	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>
Sunday	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>

Save Cancel

**Note:** This assignment procedure can only be done when creating a new office or user. Changing business unit for the existing users and offices will be described in the next section. Ensure you restart Strato to apply all changes.

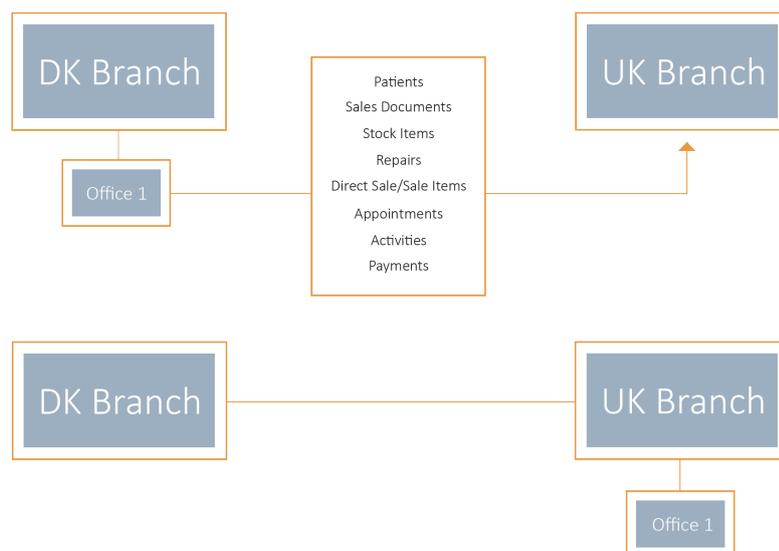
All existing users and offices will by default be assigned to the level of Organisation.

**Note:** Organisation level admin can have access to all **Administration** settings. Admin assigned to other business units will only have access to **Offices** and **Users** tabs.

### 3.4 Moving offices to another business unit

Since offices in Strato contain data on patients, sales documents, patient appointments, repair orders etc., we have created a new functionality to enable you to smoothly transfer offices from one business unit to another. On the chart below you can see how **Office 1** belonging to the **DK Branch** business unit can be transferred to the **UK Branch** business unit.

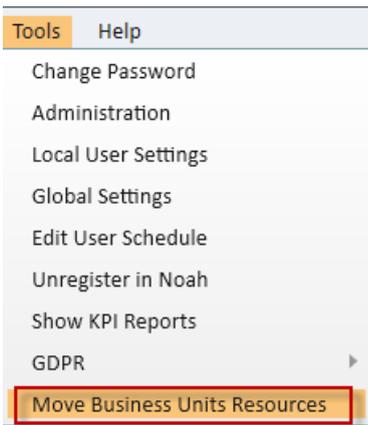
**Note:** This functionality is only available for the Organisation level administrators.



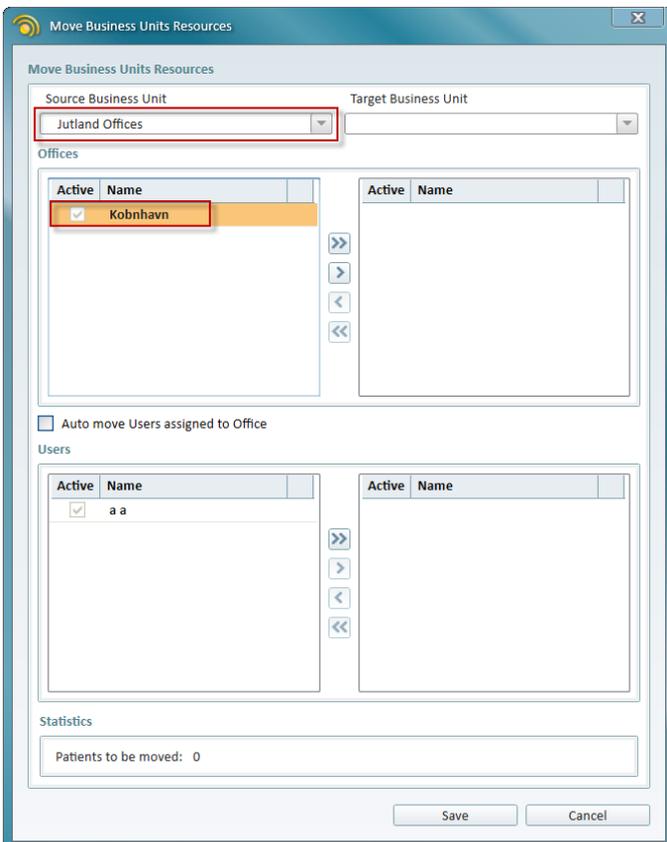
As displayed above, the following office related information will be transferred:

- Patients
- Sales Documents
- Stock Items
- Repairs
- Direct Sale/Sale Items
- Appointments
- Activities
- Payments

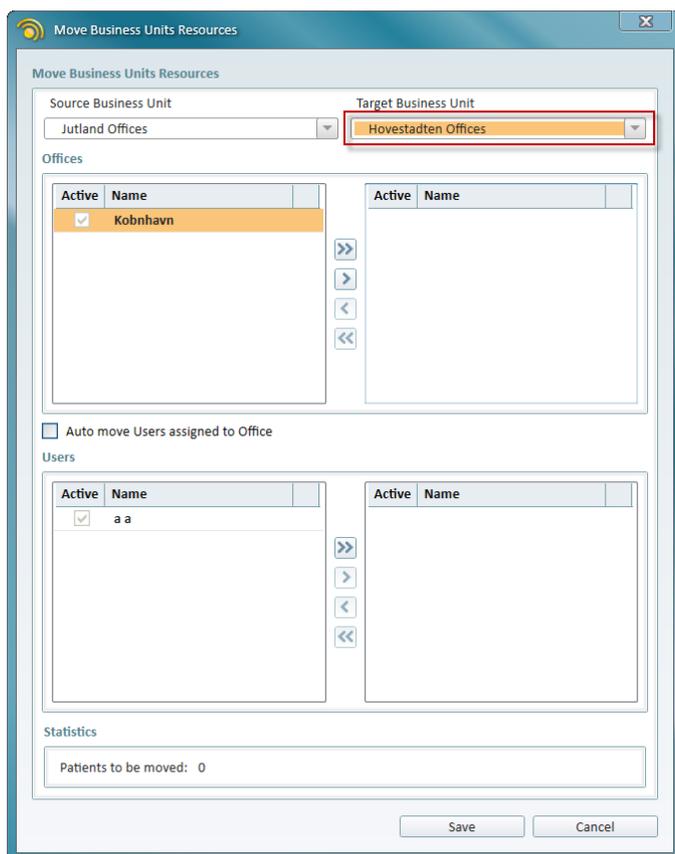
To perform office transfer, click the **Tools** menu and select **Move Business Units Resources**.



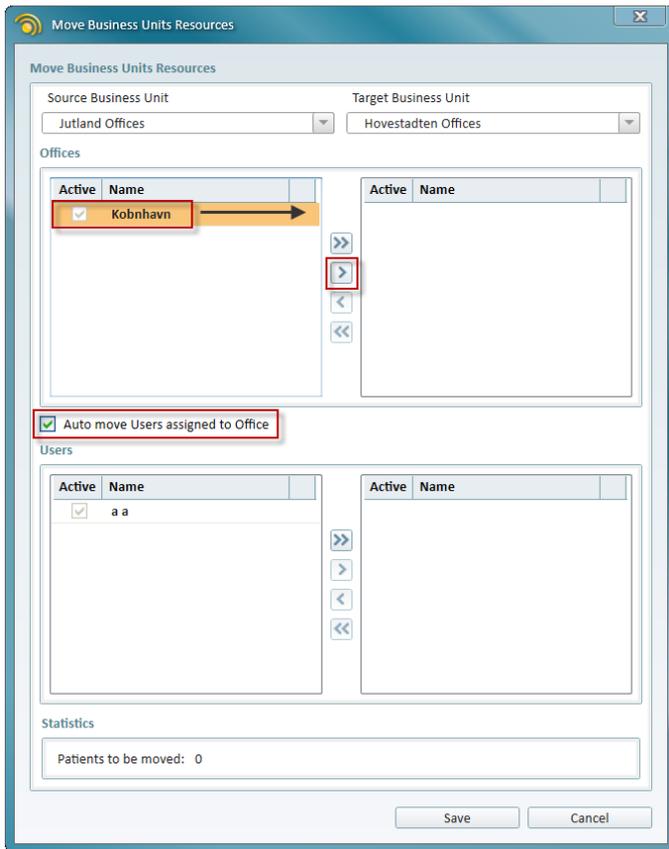
In the opening window, first select the source business unit you are transferring from. All the offices assigned to this business unit will be listed below.



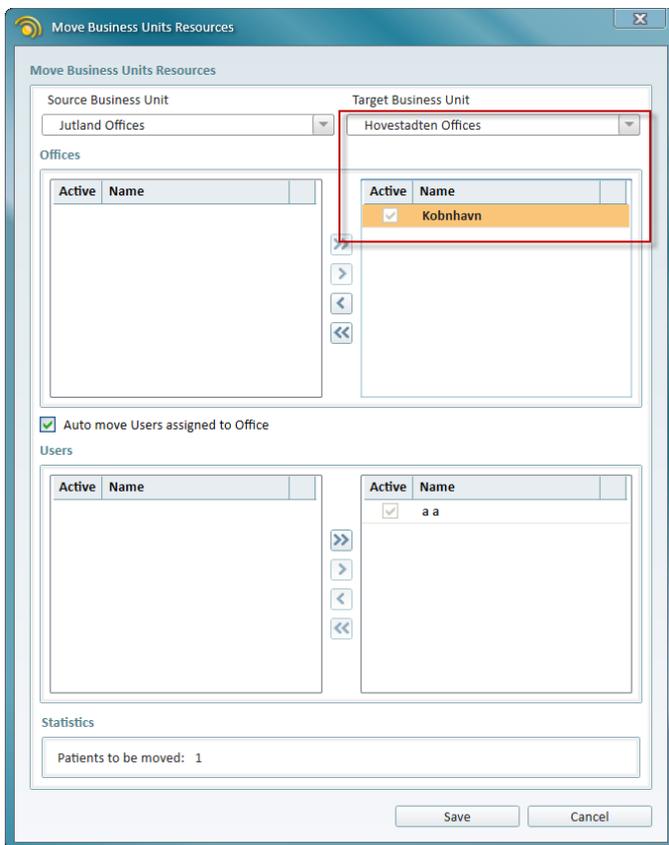
Next select the target business unit to transfer to.



Then select the office you intend to transfer and click the  button. If the **Auto move Users assigned to Office** check box is selected, all users assigned to the office which is being transferred, will be transferred as well.



The office will now be listed under the new business unit.

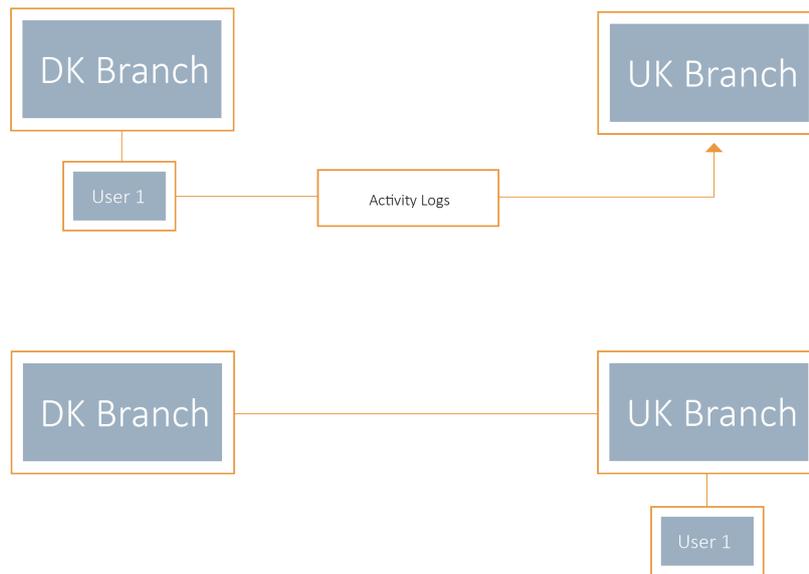


Finally, click **Save** to complete the procedure.

In the *Statistics* section you can view the number of patients you are transferring with the office. All patients assigned to the office will be transferred to another business unit as well.

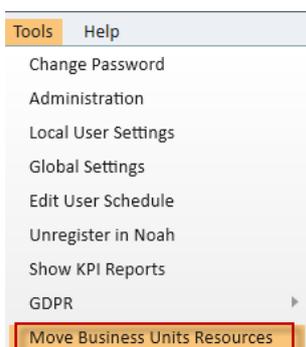
### 3.5 Moving users to another business unit

As you transfer users from one business unit to another, only their activity logs will be transferred to another unit, as shown below.

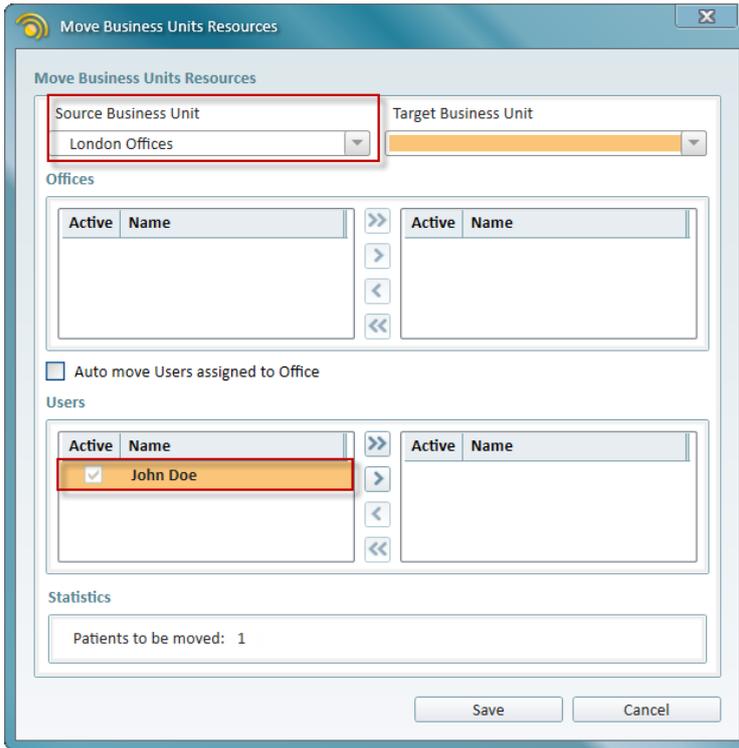


To do the transfer:

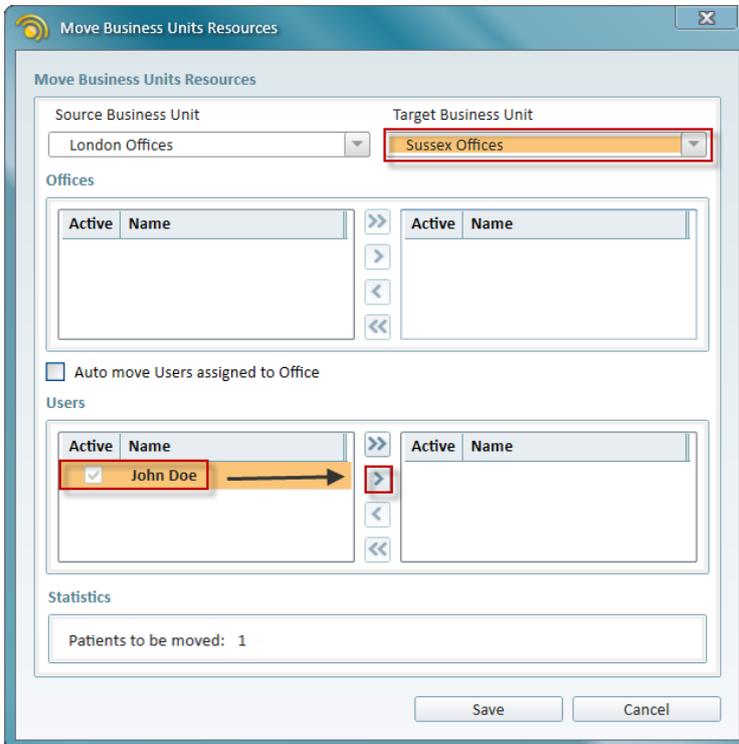
1. Go to **Tools** menu and select **Move Business Units Resources**.



2. Select the source business unit you are transferring from. All the users assigned to this business unit will be listed below.



- 3. Select the target business unit. Click on the user you want to transfer and then click the  button.



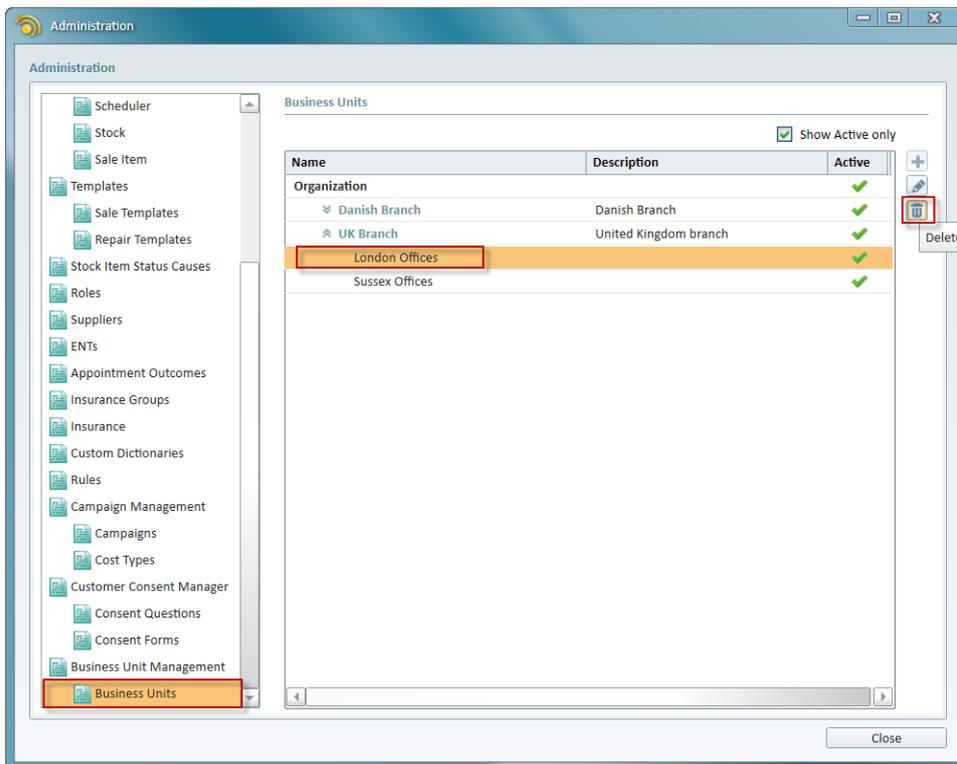
- 4. Click **Save** to complete the transfer. Restart Strato to apply the changes.

As mentioned above, users assigned to the business unit of the **Organisation** level will have access to all resources within Strato. Users assigned to the lower level business units, e.g. **UK Branch**, will have access to all resources of their business unit and to all other business units below it - e.g. **South** and **North**.

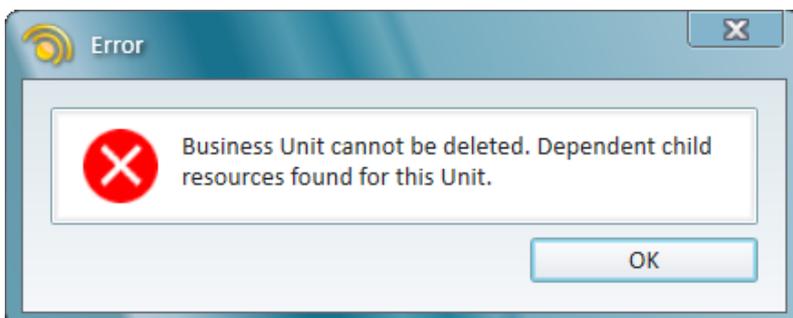
### 3.6 Deleting business units

To delete business units:

1. Go to **Tools > Administration** and select the **Business Units** tab.
2. Then select the unit you want to delete and click the **Delete** button.



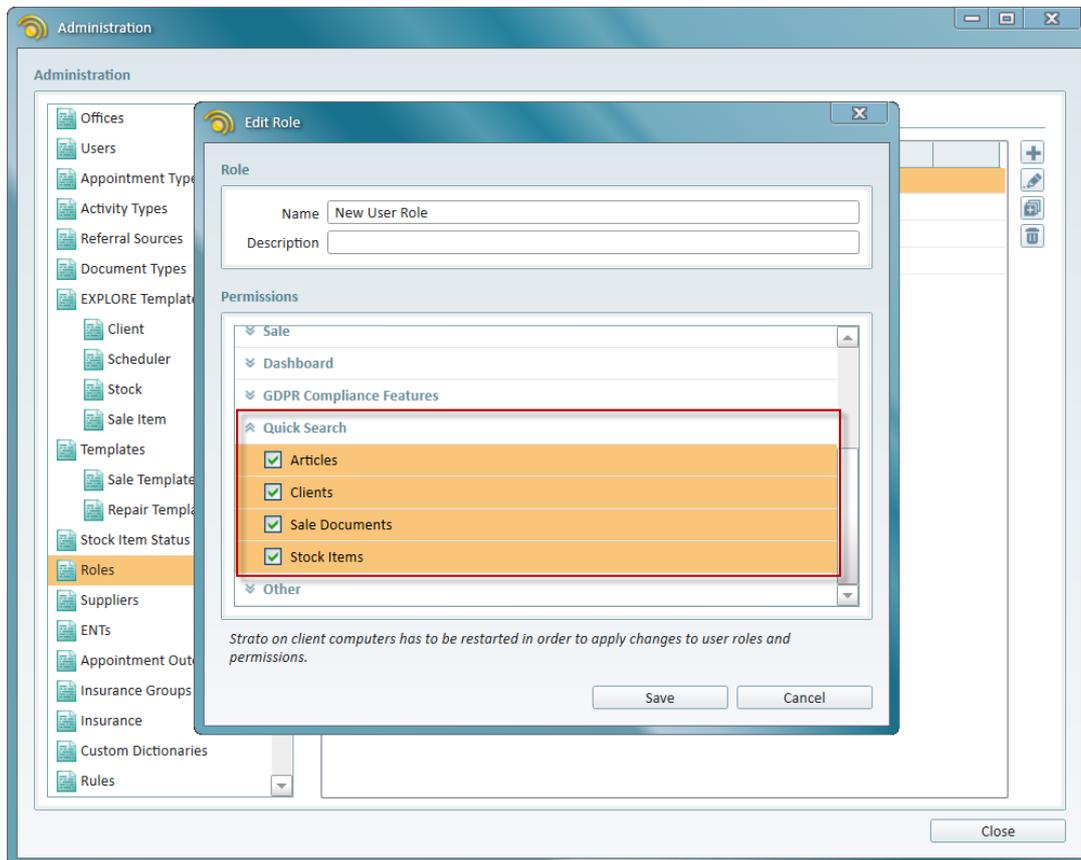
You can only delete business units that have no resources assigned to them - users or offices. It is also impossible to delete the business unit that has other units assigned to it. If you try to delete such units, an error will be displayed.



## 4 Roles and Permissions

### 4.1 New Quick Search permissions

Administrators can now set **Quick Search** permissions for all the new roles created in Strato. To do this, go to **Tools > Administration > Roles** and create a new role. Find the new permissions group called **Quick Search**.



Select all options to allow users with this role get quick search results from Articles, Clients, Sale Documents and Stock Items. Otherwise, set up your custom restrictions and click **Save**.

Users with restricted access to Articles will not be able to get search results from this area. If you restrict access to all the entities, the **Quick Search** field will be disabled for such users.

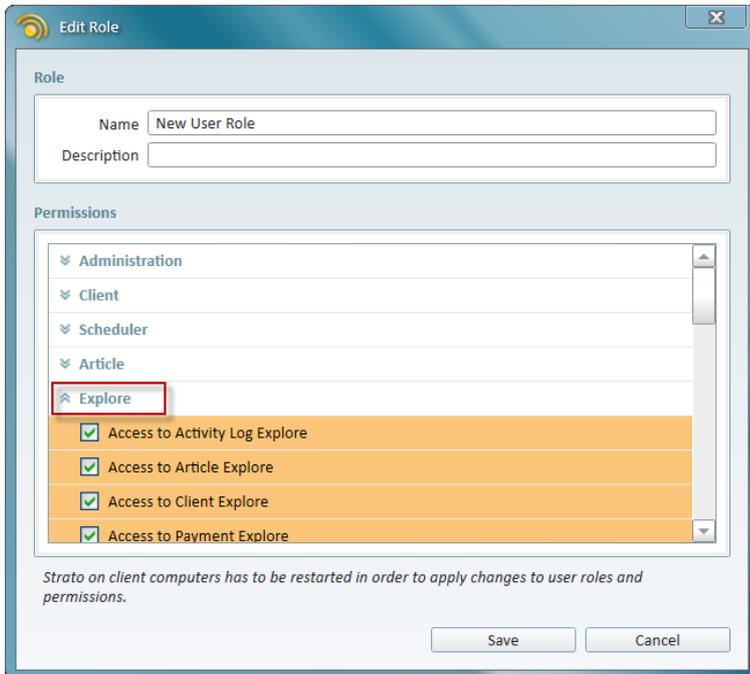
Default **Admin** and **User** roles have access to all **Quick Search** results, so this new feature will only apply to the newly created roles.

**Note:** Business units related restrictions apply to all **Quick Search** results except for when you search for Articles. Your search will return results only from your business unit or from business units assigned to it.

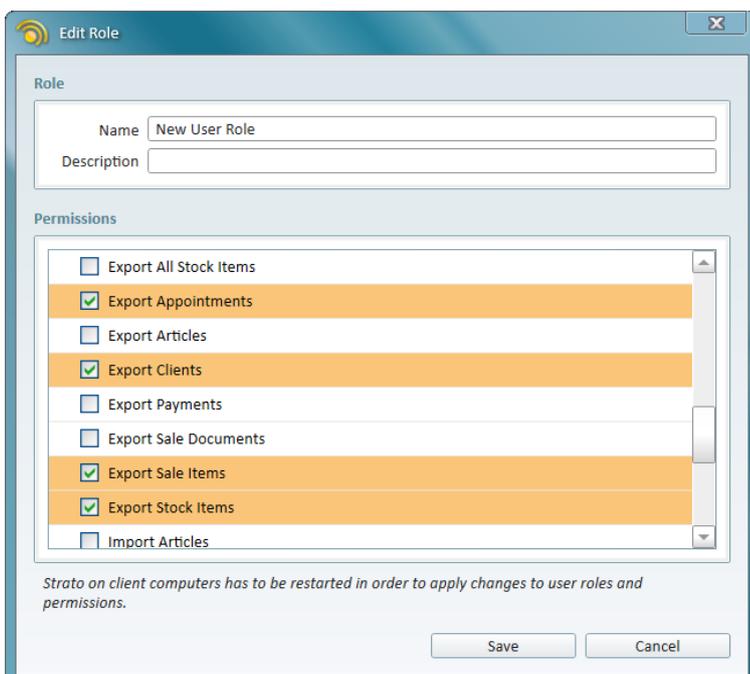
## 4.2 Export permissions per module

We have added more flexibility in allowing/disallowing users to perform export from a certain module. Now you can set separate export permissions for Activity Logs, Appointments, Articles, Clients, Payments, Sale Documents, Sale Items and Stock Items.

To do so, start editing a role in Strato and then locate the **Explore** permissions group.



Set your custom export permissions and click **Save** to apply the changes.



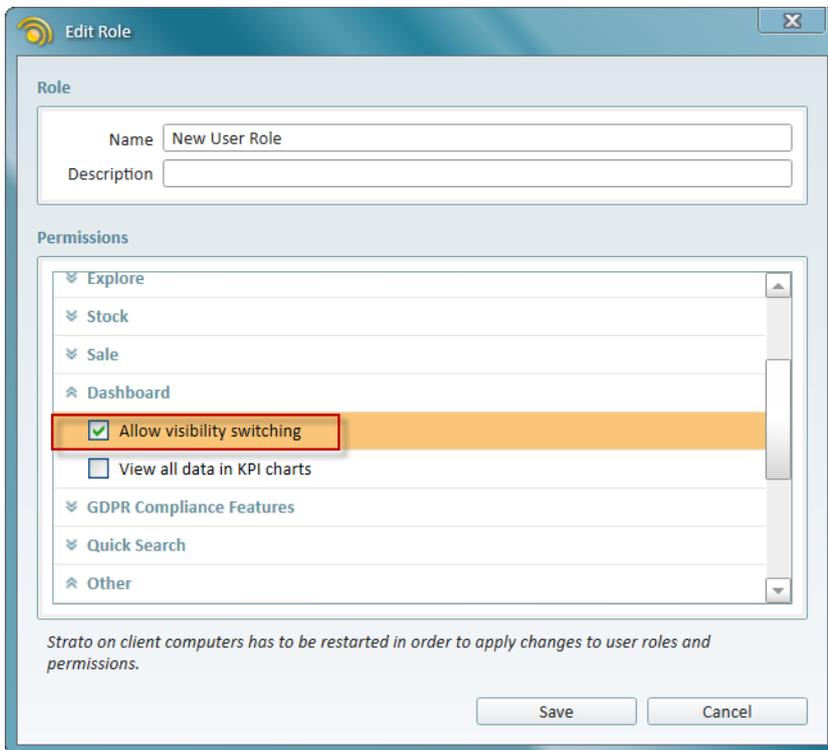
For example, if a user with no client export permissions opens **Client EXPLORE**, the following areas will be disabled:

- **Export options**
- **Open Template** button



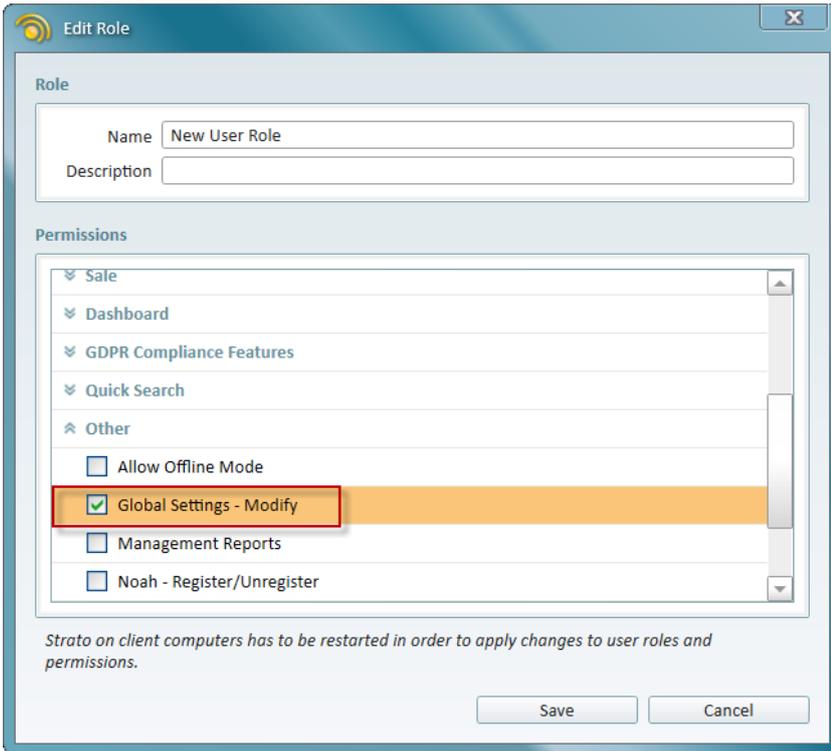
### 4.3 Permission to view Dashboard

We have added the new permission to show/hide dashboard for a user. To set it up, go to **Tools > Administration** and start editing the user role. Find the **Dashboard** permissions group and select **Allow visibility switching**.



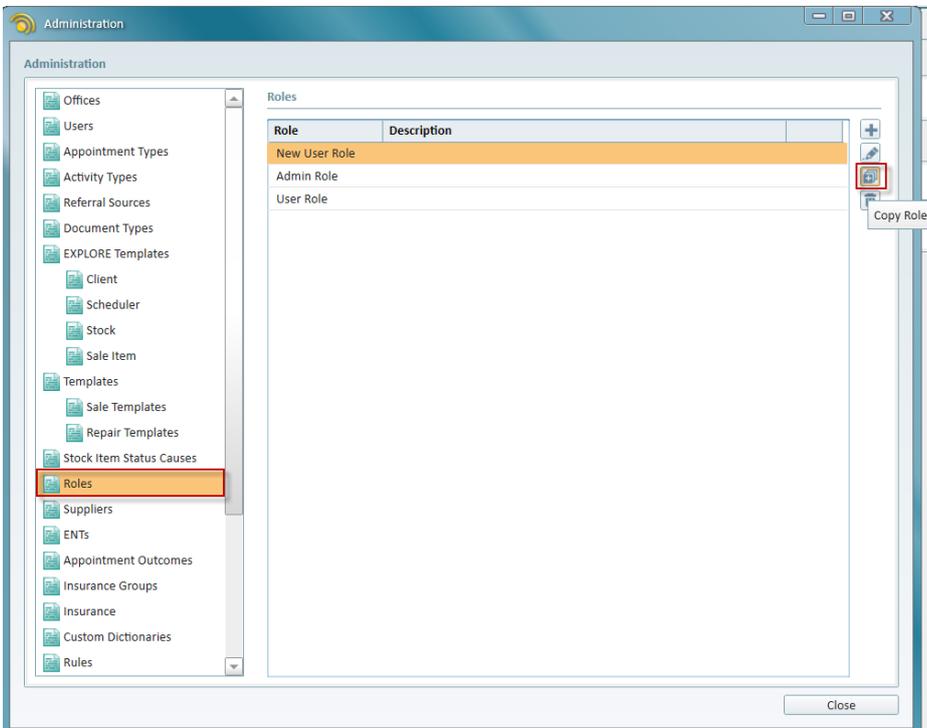
Now open **Tools > Global Settings** and go to the **Other** tab. Select the **Show Dashboard** check box to allow user to have access to dashboard in Strato.

**Note:** This functionality requires access to **Global Settings** which can be set up by editing a user role and selecting the **Global Settings - Modify** option in the **Other** permissions group.



### 4.4 Easy way to copy roles

You can now easily copy the existing Strato roles by clicking the **Copy Role** button.



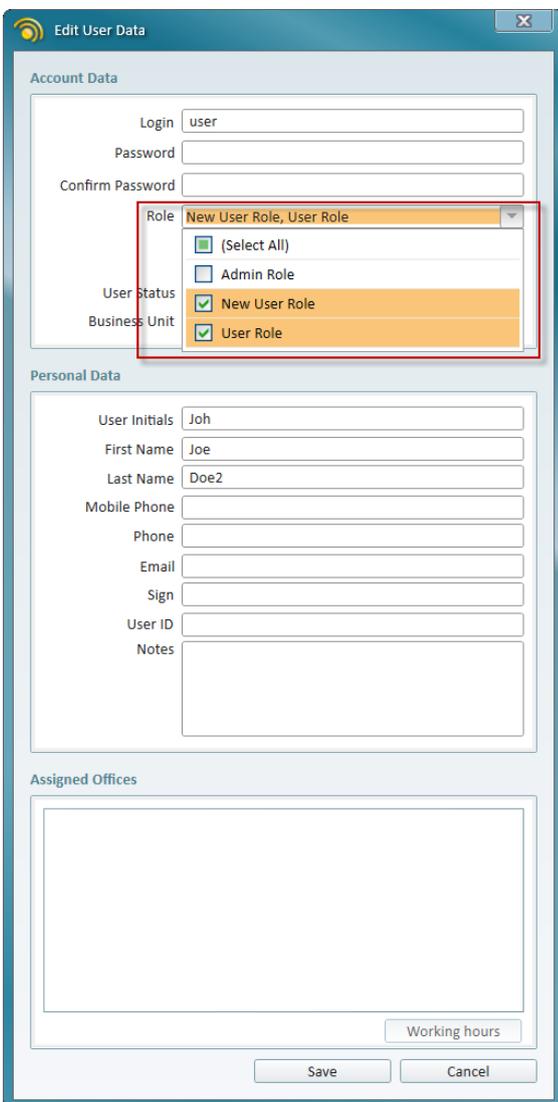
Enter the new role's name and description and proceed to setting up your custom permissions for the new role. All permissions for the role you are copying from will apply for the new role as well. Click **Save** to complete the procedure.

**Note:** Strato needs to be restarted to apply changes to user roles and permissions.

### 4.5 Multiple roles per user

In Strato it is now possible to assign multiple roles per single user. If a user has two different roles assigned and the first role provides access to area A and the second one to area B, then the user will have access to both areas.

To assign multiple roles, start editing any user in Strato and then locate the **Role** drop down list. Select one or several roles to be assigned and click **Save**.



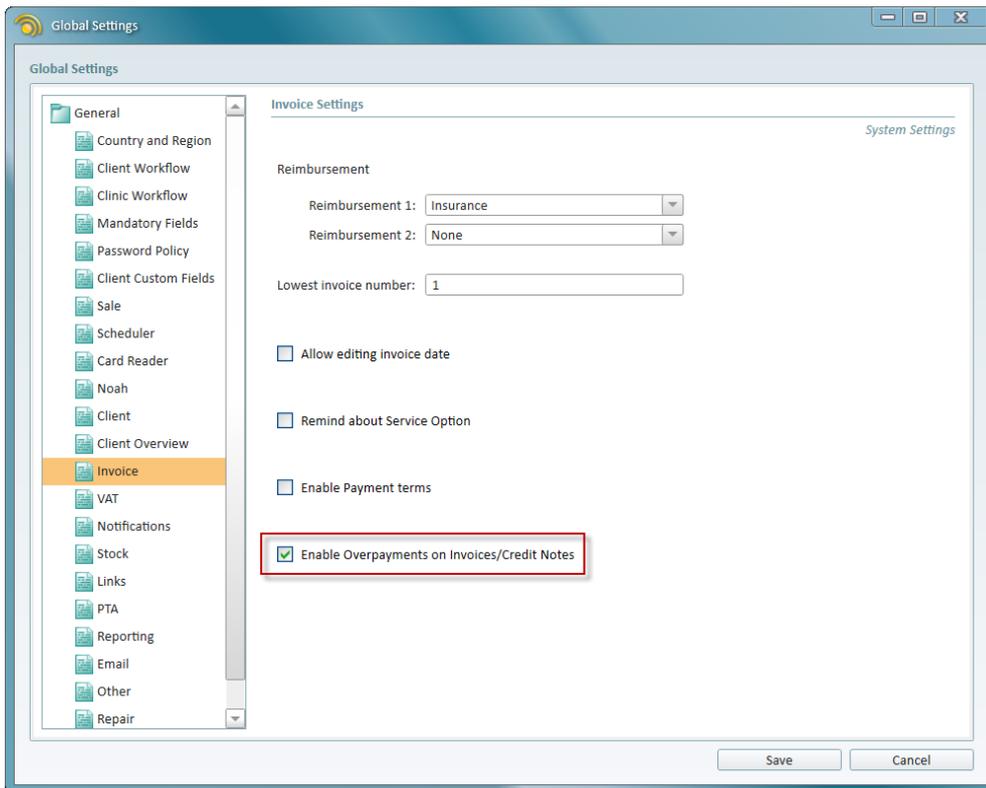
## 5 Other Improvements

### 5.1 Overpayment enhancement

We have added even more flexibility in managing overpayments. Now in case of an overpayment you can return any amount of money by any available payment method.

For instance, for the invoice of 1000 EUR that was paid by 600 EUR in cash and 600 EUR by bank transfer, you can return 200 EUR by any payment method - cash, bank transfer or card.

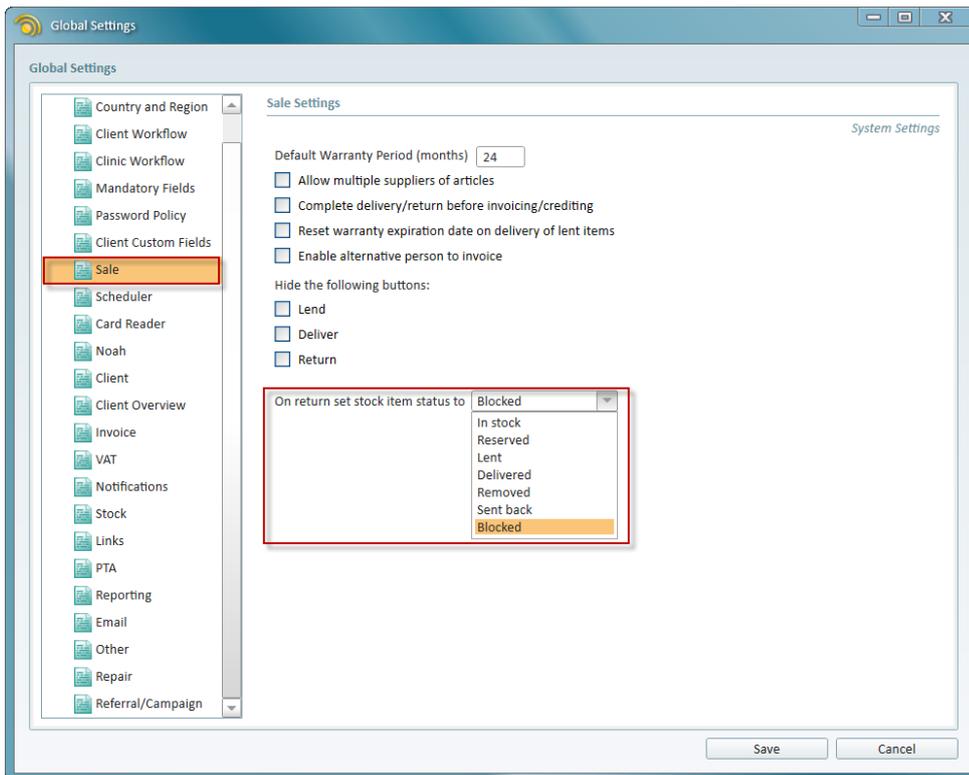
This applies to any invoices and credit notes in Strato - client, insurance and insurance groups.



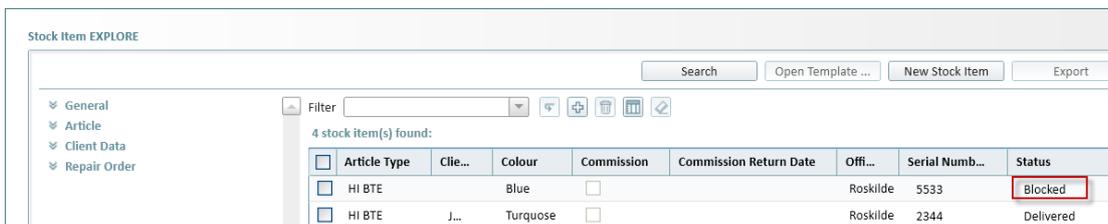
## 5.2 Possible to set status for stock item returned to the shop

While previously all returned items were automatically marked as *In Stock*, it is now possible for the administrator to specify any status for the returned serial stock item. You can, for instance, mark returned items as *Blocked* until you are ready to return them to stock.

Go to **Tools > Global Settings** and select the **Sale** tab. Select the needed status in the **On return set stock item status to** drop down list.



All returned stock items will now be in the status *Blocked*.



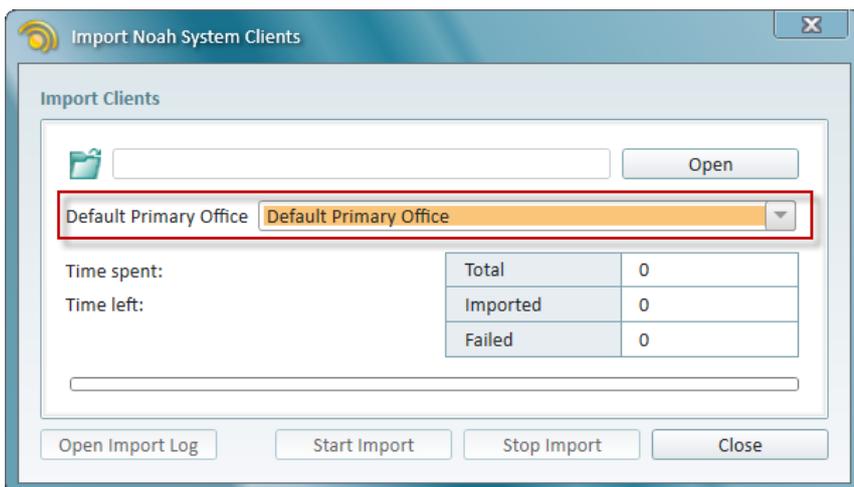
### 5.3 Redesigned UI for client search by birth date in Client EXPLORE

We have improved UI for searching clients by their birth date. Specify the day range to search for clients that have birthdays within this period.



### 5.4 Primary office is mandatory

Since *Primary Office* is now a required field for a client in Strato, we have removed it from **Tools > Global Settings > Mandatory Fields**. You also need to specify *Default Primary Office* when importing NOAH clients.



## 6 Additional Information

For further information, please contact [stratosales@auditdata.com](mailto:stratosales@auditdata.com) or visit [www.auditdata.com](http://www.auditdata.com).