Getting Started

Document Version: DN200231/03

Strato

auditdata

Your Partner in Audiology Solutions

1 STRATO OVERVIEW

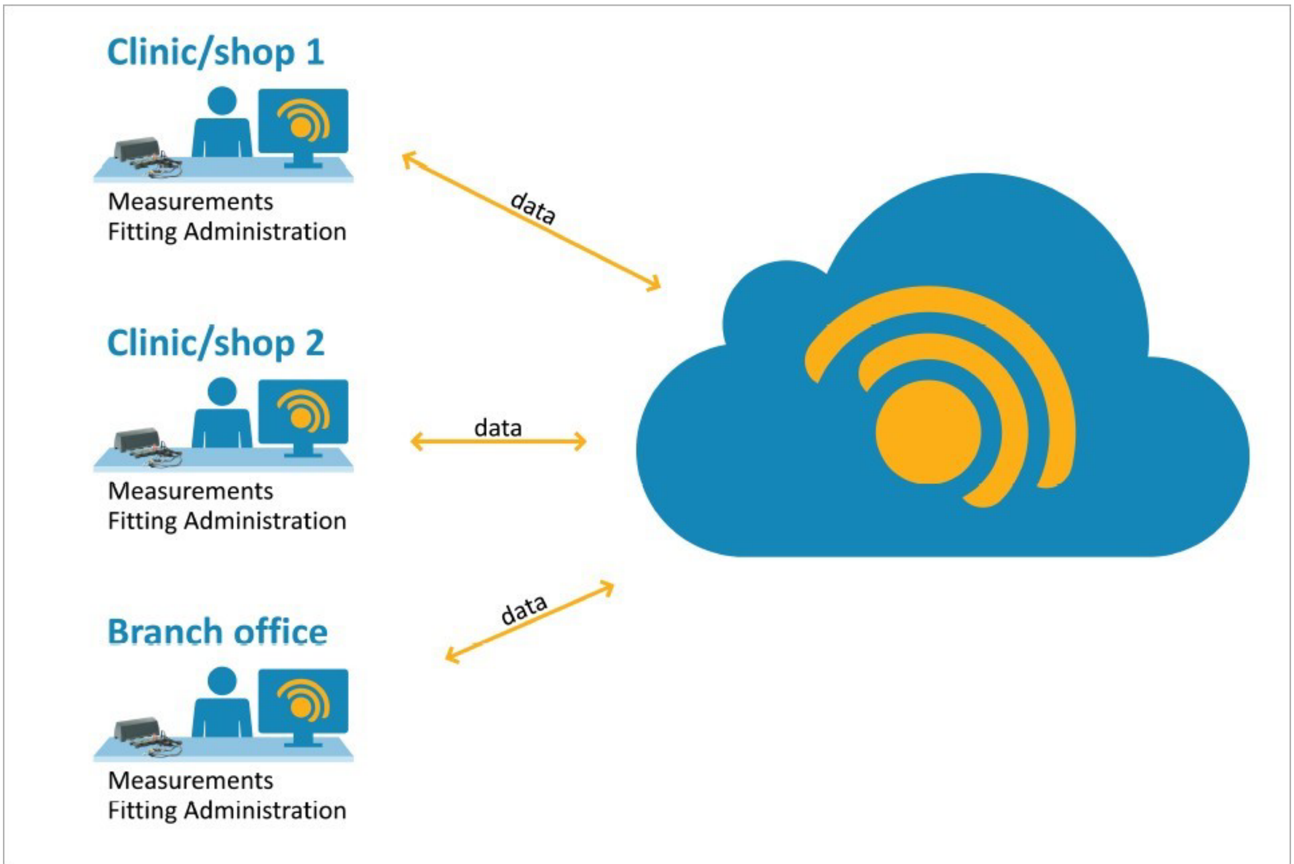
Strato is an online Office Management System designed specifically for hearing clinics and hearing aid dispensers/shops.

The system is fully integrated with NOAH enabling you to handle all your clinic tasks – appointments, measurements, fittings, journals, follow-ups and repair/service – from a single workplace.

Its key advantages are as follows:

- Ease of use – the interface and menus are intuitive and user-friendly, and it takes a short amount of time for a user to familiarize with the system.
- Strato is a fully cloud-based application available 24/7 from any location, with data protection, security, backup and system updates automatically taken care of. You log in, do your work – and log off again.
- Your data – appointments, audiograms, fitting data, journals and such – are regularly updated and can be accessible from any location at any time.

This document will guide you through the installation and initial configuration of Strato and ensure that you can start using the system immediately.



2 INSTALLATION

Prior to starting the installation process, ensure that your computer meets or exceeds the minimum system requirements.

2.1 System Requirements

Processor	Processor/Clock speed: 2 GHz (or higher)
System RAM	2 GB (4 GB recommended)
Free hard drive space	1 GB free for Strato and 1 GB free for every Noah module (audiometric equipment, fitting software, REM/HIT software)
Operating System*	Microsoft Windows 8 (not Windows RT), Microsoft Windows 10
Screen Resolution	1280x960 (or higher)
Network	Internet connection min. 0,5 Mbit/s
Noah	Strato is compatible with Noah v4.12
Noah License	Noah 4 Engine license is needed for using Noah modules in Strato

**Your OS must be up to date. All Windows updates must be installed.*

Noah Licensing

Strato is fully integrated with the Noah system, and can run a variety of Noah fitting and measurement modules.

For more information about Noah, visit the **HIMSA** website.

- If you intend to use Strato along with Noah, version Noah 4.12.0 (build 4882) or later of Noah is required.
- If you have not obtained and installed a Noah 4 license, Noah will cease to operate after 45 days.

To check Noah version and license information, go to the Strato **Help** > **About** and then click **Noah License**.

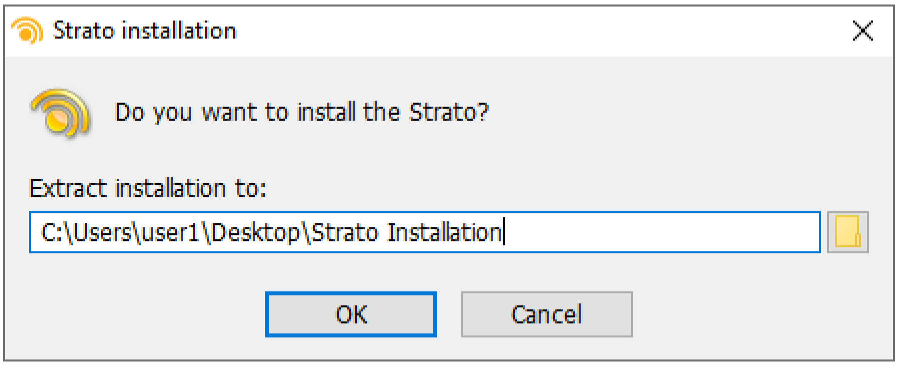
You can purchase the license from Auditdata. This will help ensure that you receive the best Noah support possible. Contact **Auditdata** for more information.

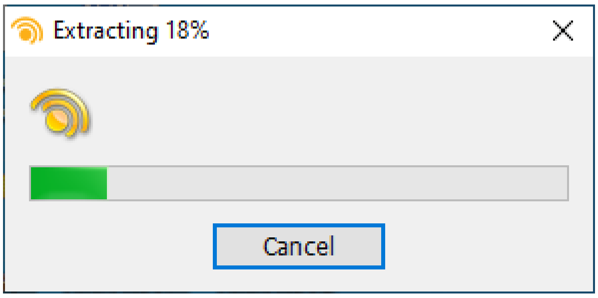
There can be problems if a different Noah license was previously installed on the computer. To handle this situation, Auditdata can provide a Noah 4 demo license.

The procedure for registering and installing a Noah 4 license can be found in the Noah 4 Knowledgebase on the HIMSA website.

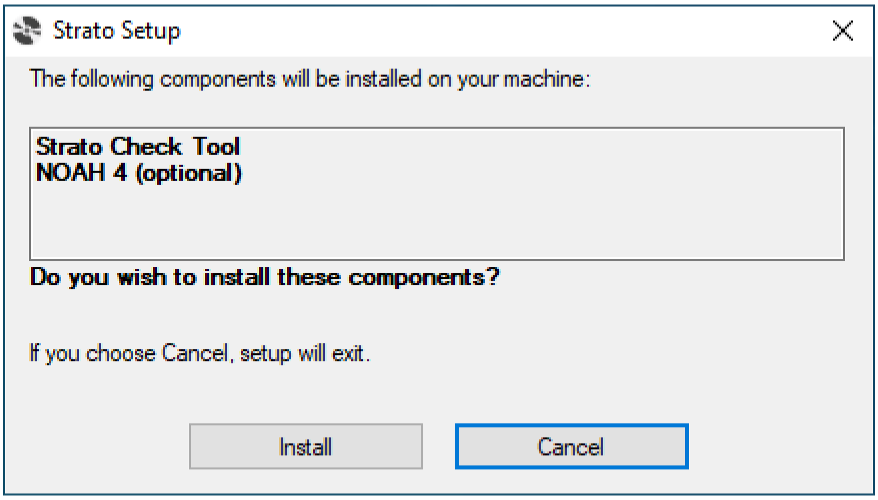
2.2 Installation Procedure

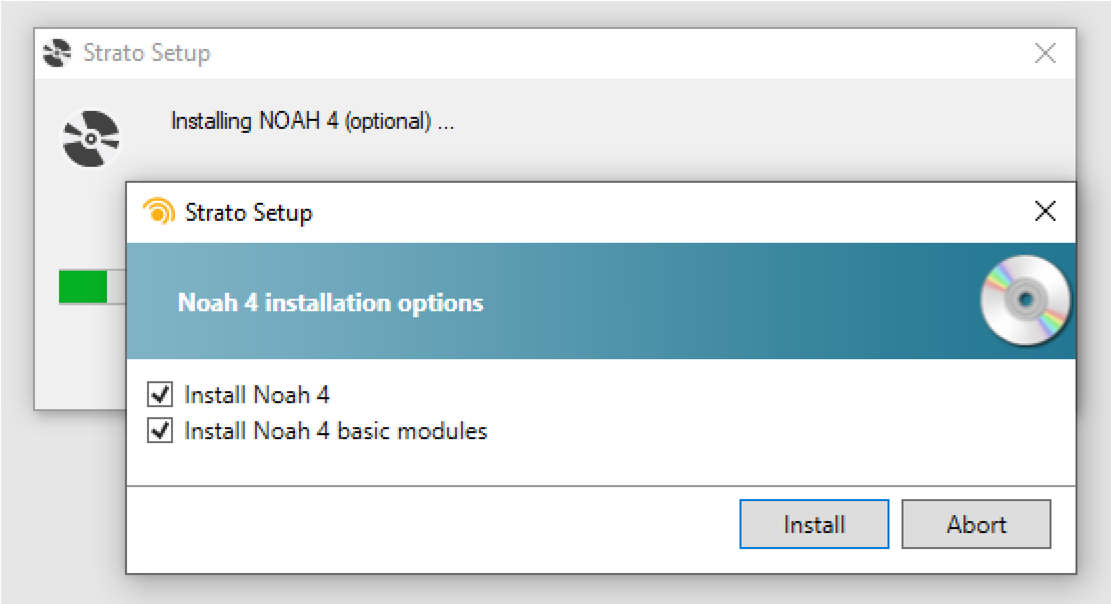
1. Download Strato from here: http://stratoupdate.auditdata.com/updates/setup/Strato.exe
2. Run the Strato **.exe** file Strato.exe and select the folder to extract the installation files:



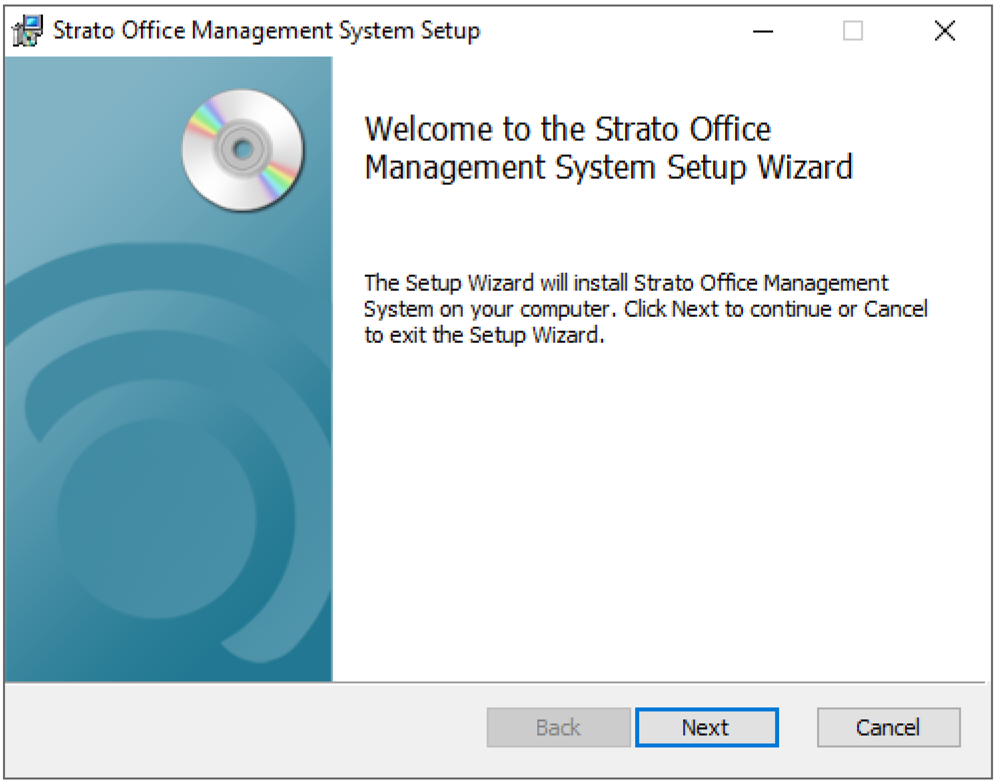


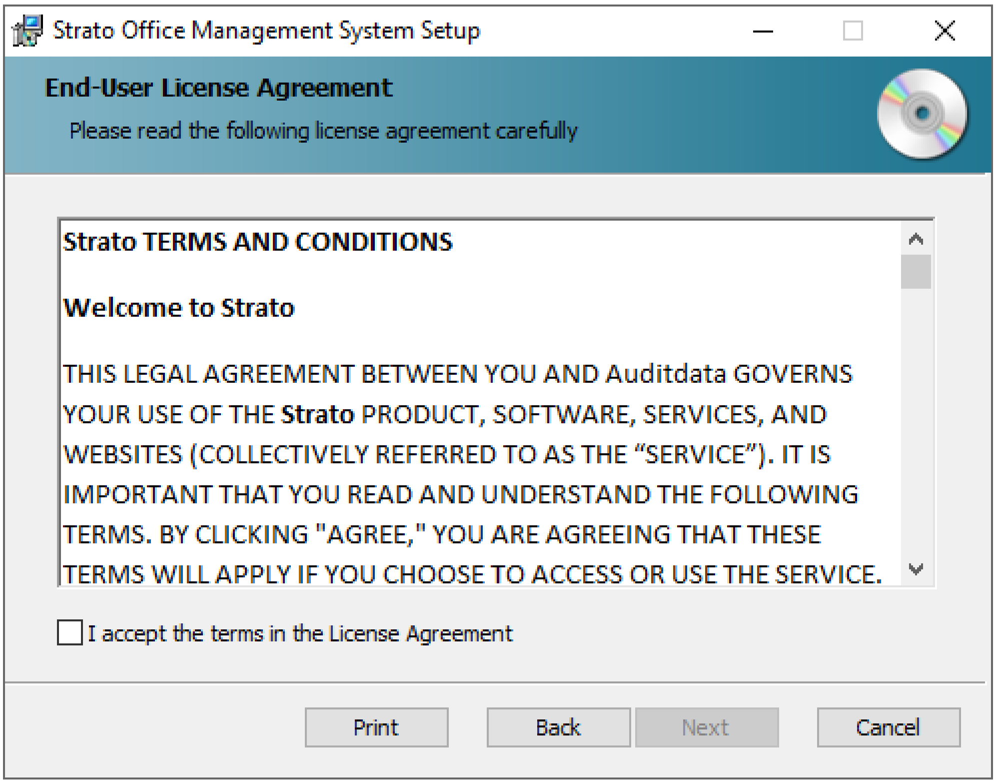
3. After extraction the Setup program will check whether Noah 4 is installed on your computer.
    - Please note that Noah installation is an optional setting for Strato.

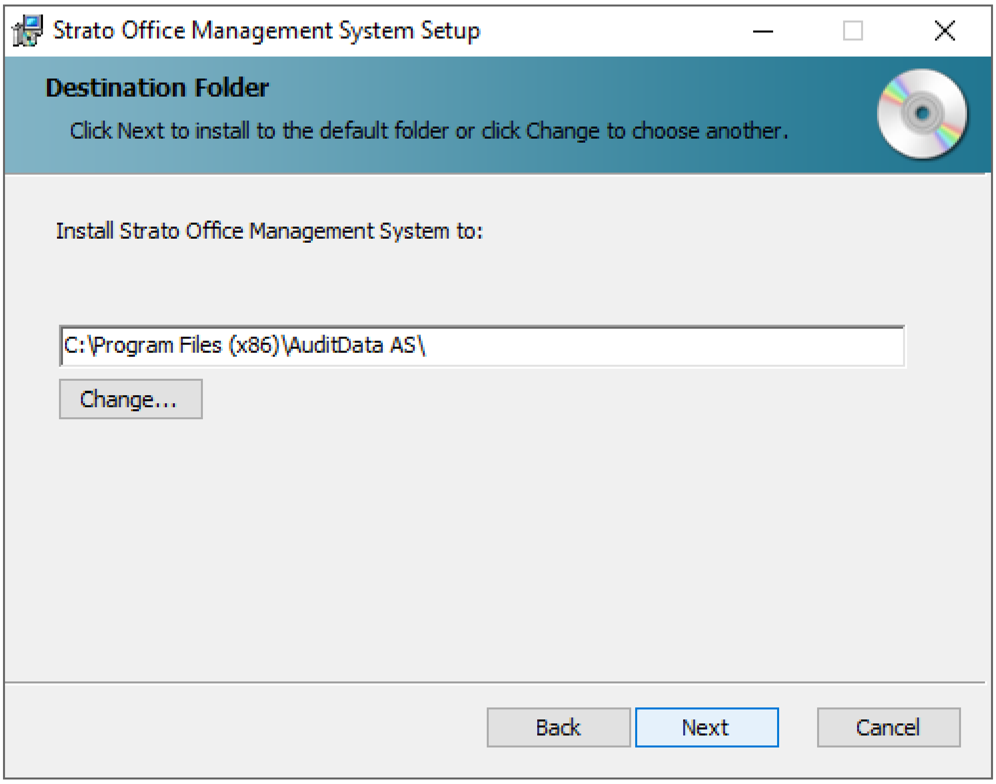


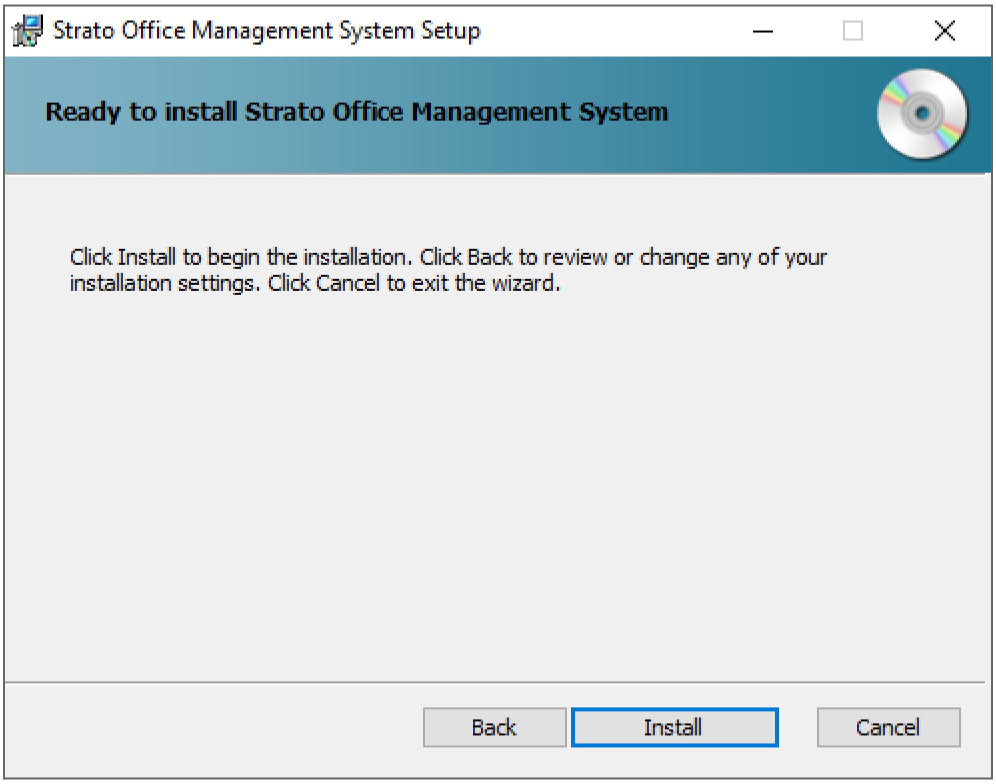


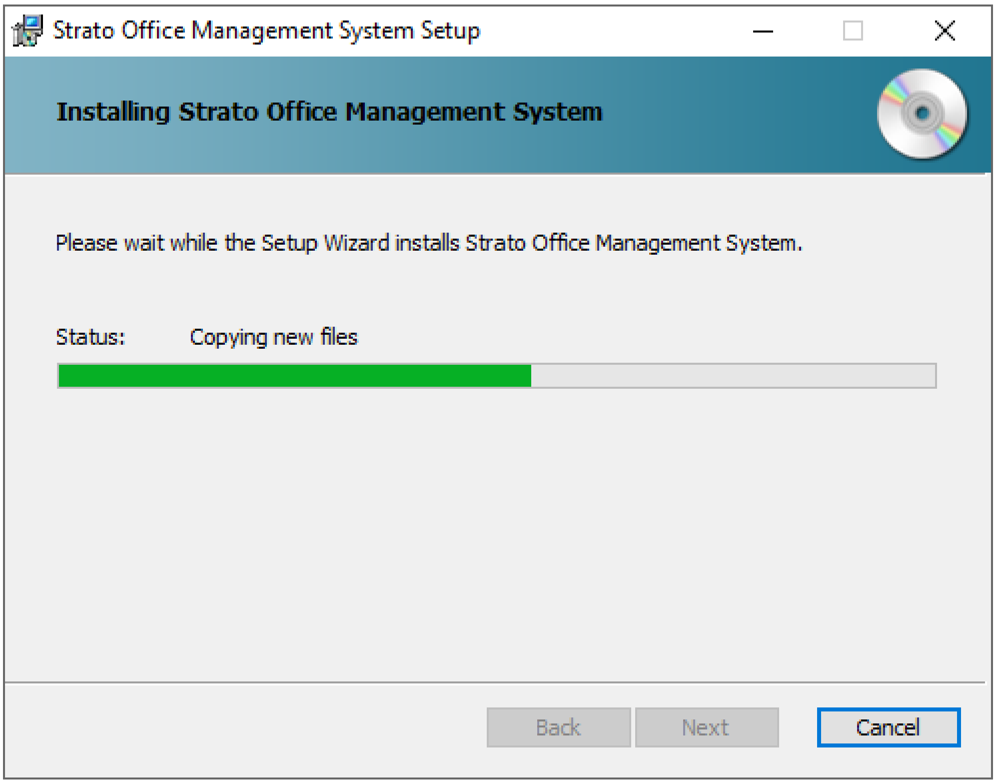
4. The installation wizard will now guide you through the installation procedure.
    - Follow the instructions on the screen.

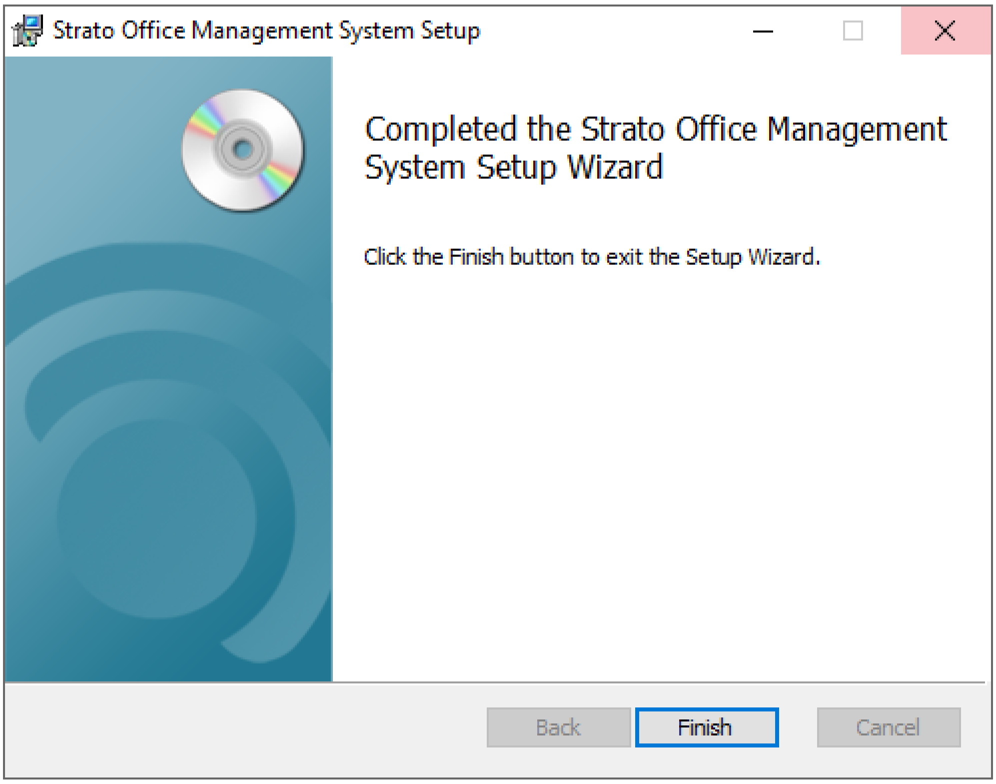



Strato Office Management System Setup
End-User License Agreement
Please read the following license agreement carefully
Strato TERMS AND CONDITIONS
Welcome to Strato
THIS LEGAL AGREEMENT BETWEEN YOU AND Auditdata GOVERNS YOUR USE OF THE Strato PRODUCT, SOFTWARE, SERVICES, AND WEBSITES (COLLECTIVELY REFERRED TO AS THE "SERVICE"). IT IS IMPORTANT THAT YOU READ AND UNDERSTAND THE FOLLOWING TERMS. BY CLICKING "AGREE," YOU ARE AGREEING THAT THESE TERMS WILL APPLY IF YOU CHOOSE TO ACCESS OR USE THE SERVICE.
I accept the terms in the License Agreement
Print
Back
Next
Cancel


Strato Office Management System Setup
Destination Folder
Click Next to install to the default folder or click Change to choose another.
Install Strato Office Management System to:
C:\Program Files (x86)\AuditData AS\
Change...
Back
Next
Cancel


Strato Office Management System Setup
Ready to install Strato Office Management System
Click Install to begin the installation. Click Back to review or change any of your installation settings. Click Cancel to exit the wizard.
Back
Install
Cancel


Strato Office Management System Setup
Installing Strato Office Management System
Please wait while the Setup Wizard installs Strato Office Management System.
Status: Copying new files
Back
Next
Cancel



5. The installation is now finished. Double-click the shortcut on your desktop to run **Strato**.

6. Use **admin** as a login name and enter the password you received in the email.
    - You will be asked to change this password the first time you log into Strato.

3 GETTING STARTED

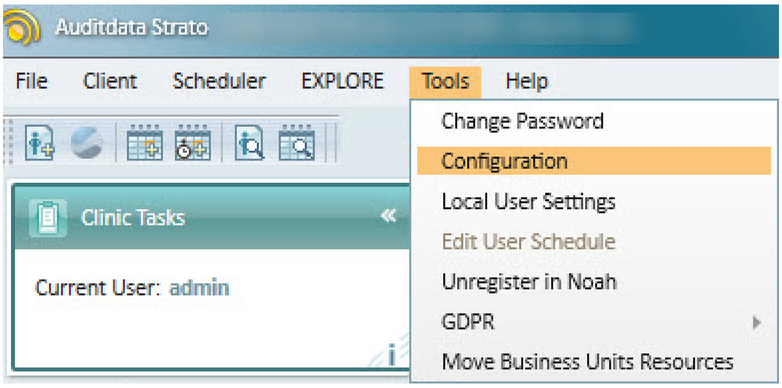
When you have completed the software installation, you can begin to familiarize yourself with the system, and customise it to your preferred work settings.

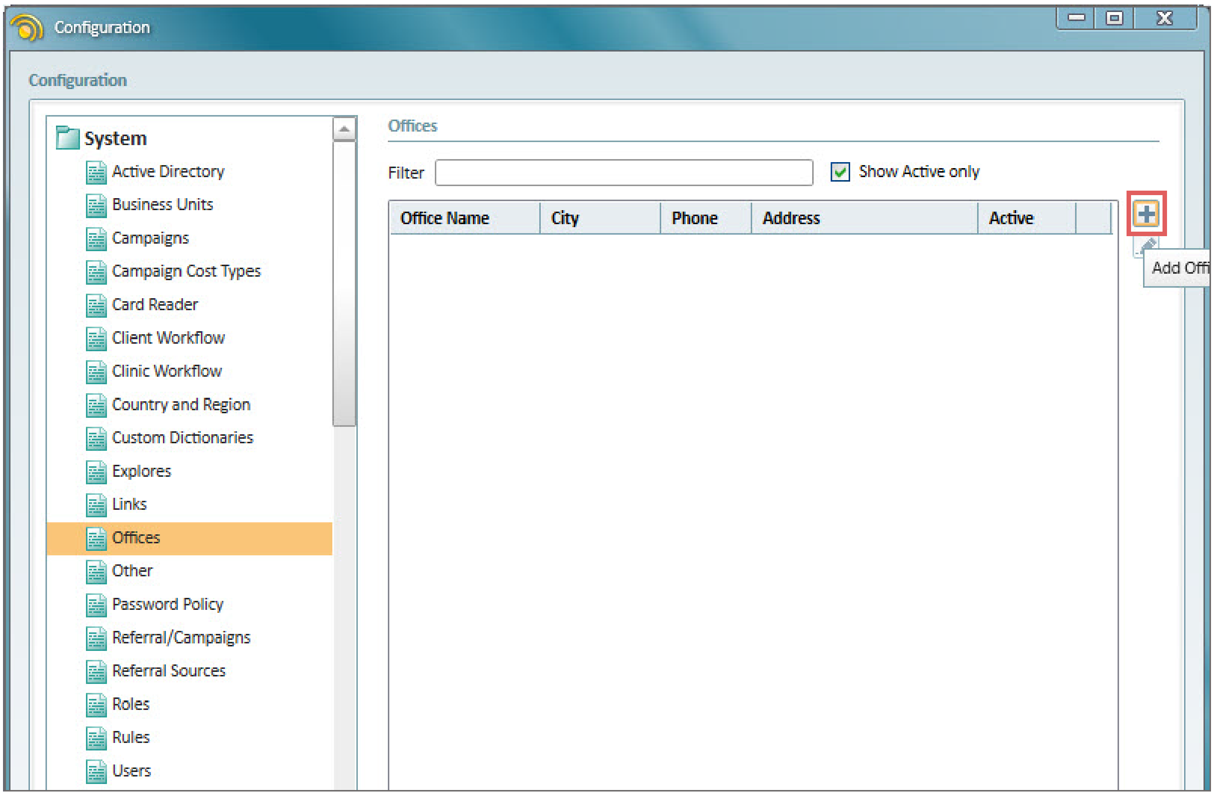
Only users with administrator rights can make changes to Configuration settings.

3.1 Creating Offices

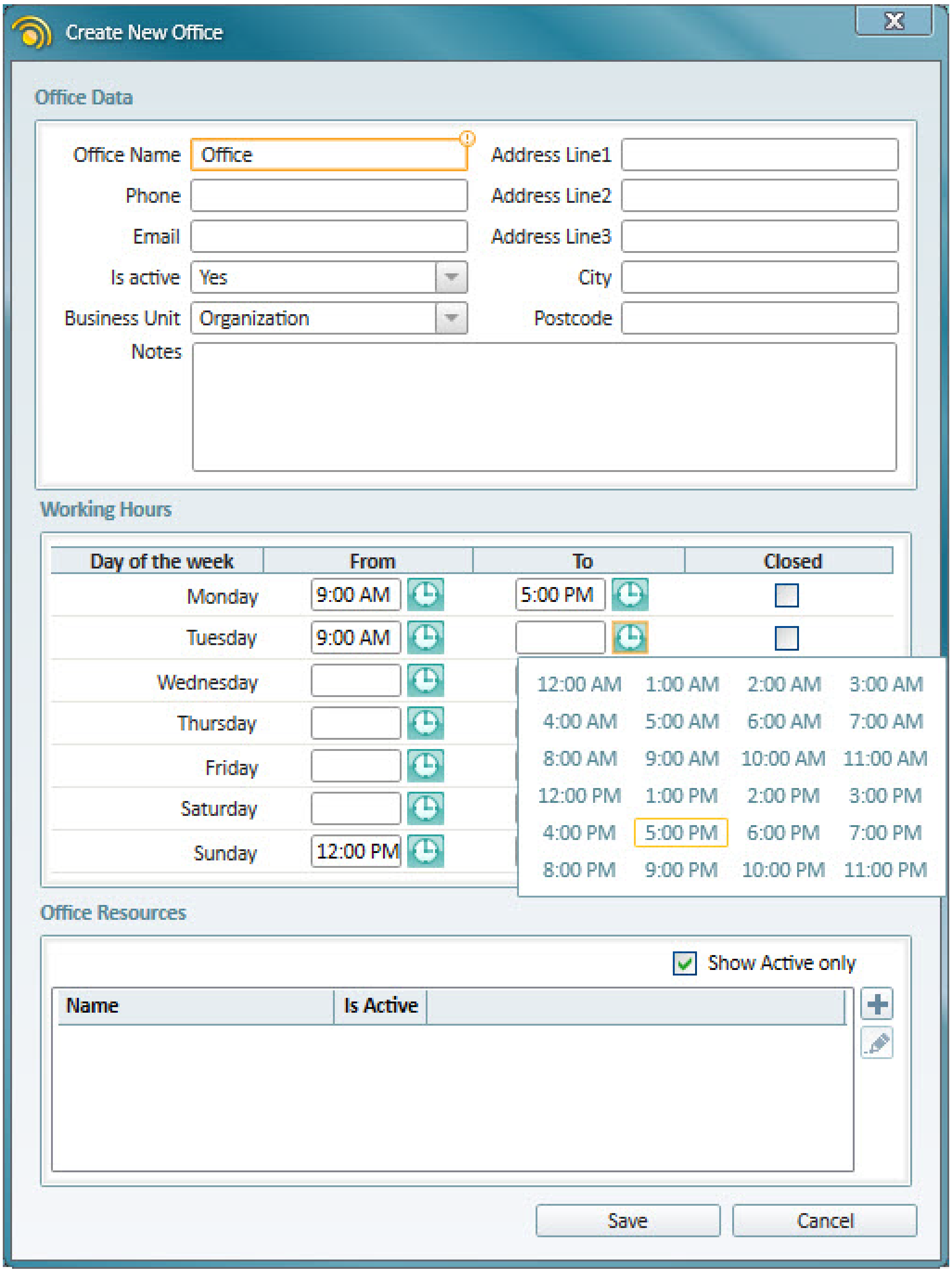
Once you logged into the system and changed the password, the first thing you need to do is to create an office. To do this:

1. Select **Tools** > **Configuration** > **System** > **Offices** and click the ADD (+) button on the right-hand side.





2. Fill in the information that you consider important and indicate the working hours. Then click **Save**.
   - The fields outlined in yellow are required.



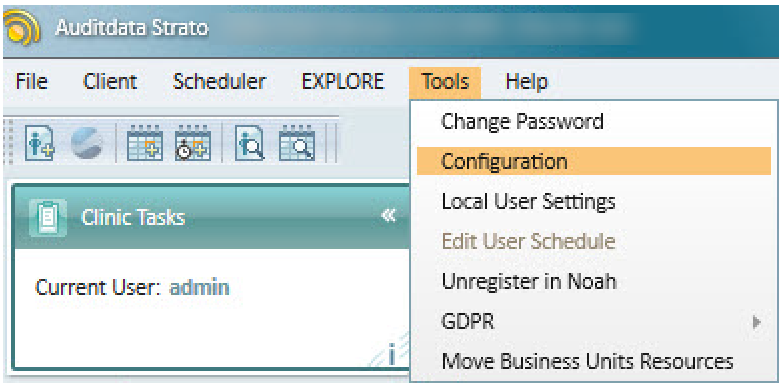
3. Create as many offices as you want repeating the above steps.
   - There may be a limitation applied via the **Maximum number of offices** setting in the Back-office.

3.2 Adding Users

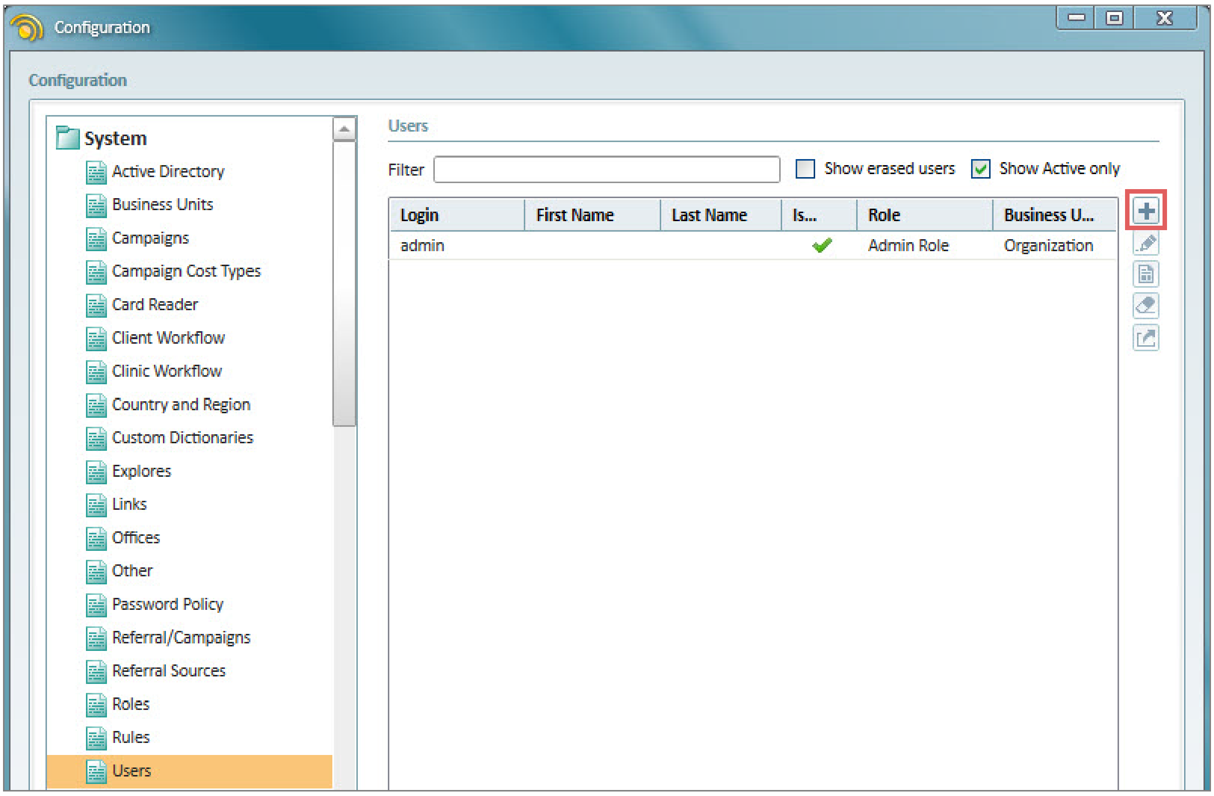
After you create offices, the next step is to add users and assign them different permissions. Thus you may allow one user to have all admin rights, while limiting access rights for other users.

To add a user:

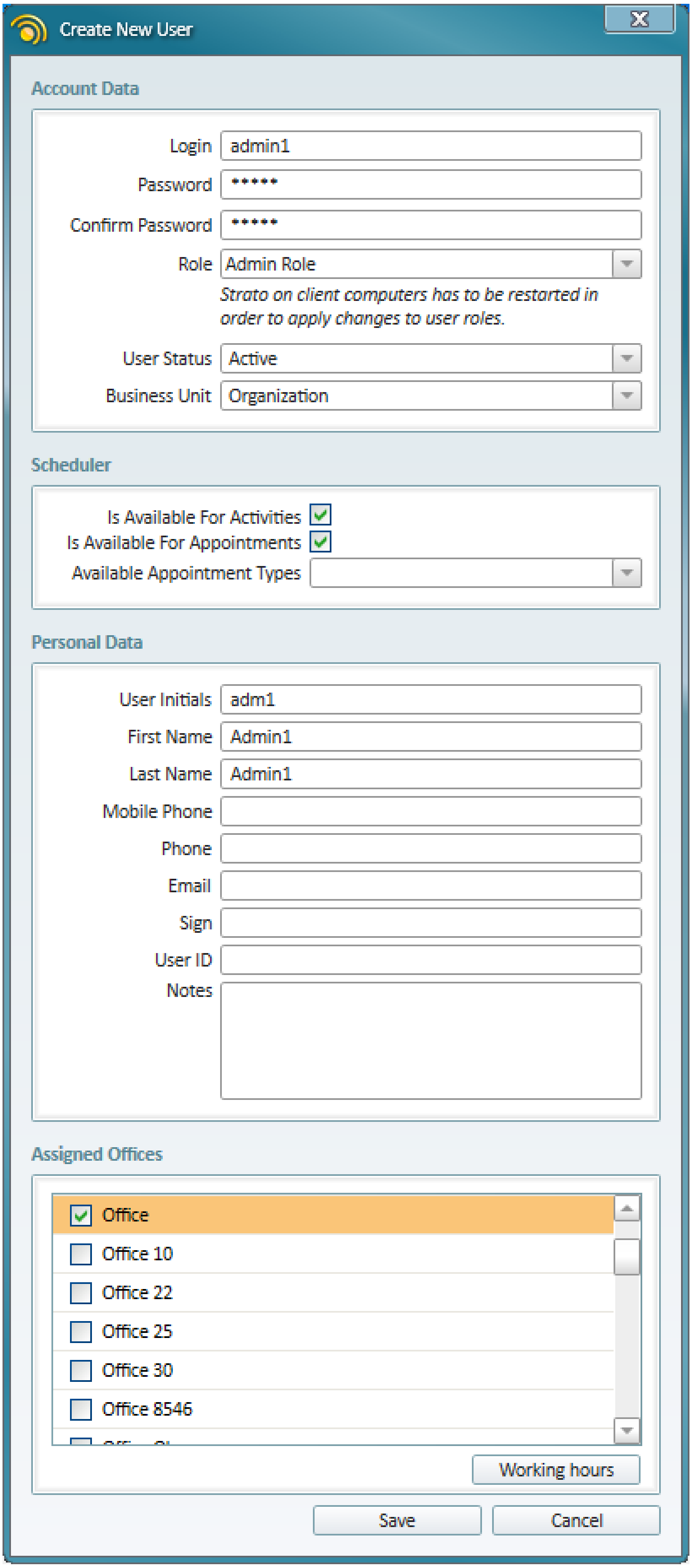
1. Select **Tools > Configuration > System > Users**



2. Click the ADD ( ) button on the right-hand side of the window to open the **Create New User** dialog.

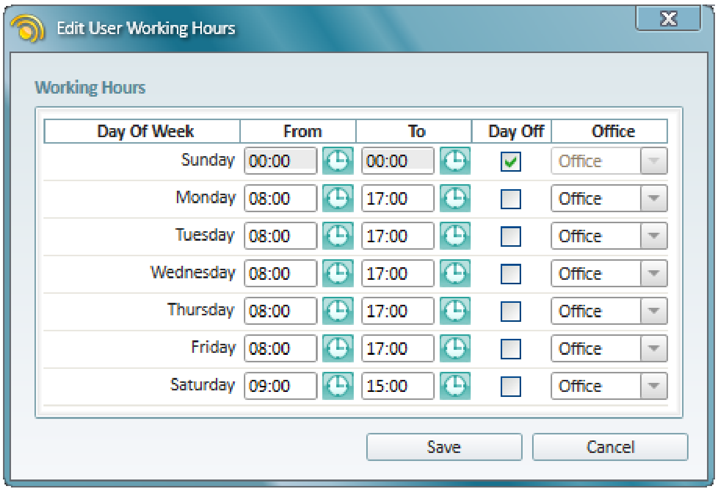


3. Fill in the fields that you consider important, such as account and personal data.
   - In the **Scheduler** section, define User availability for activities and appointments as well as available appointment types for a User.
   - In the **Assigned Offices** section, if required add working hours for the said User.

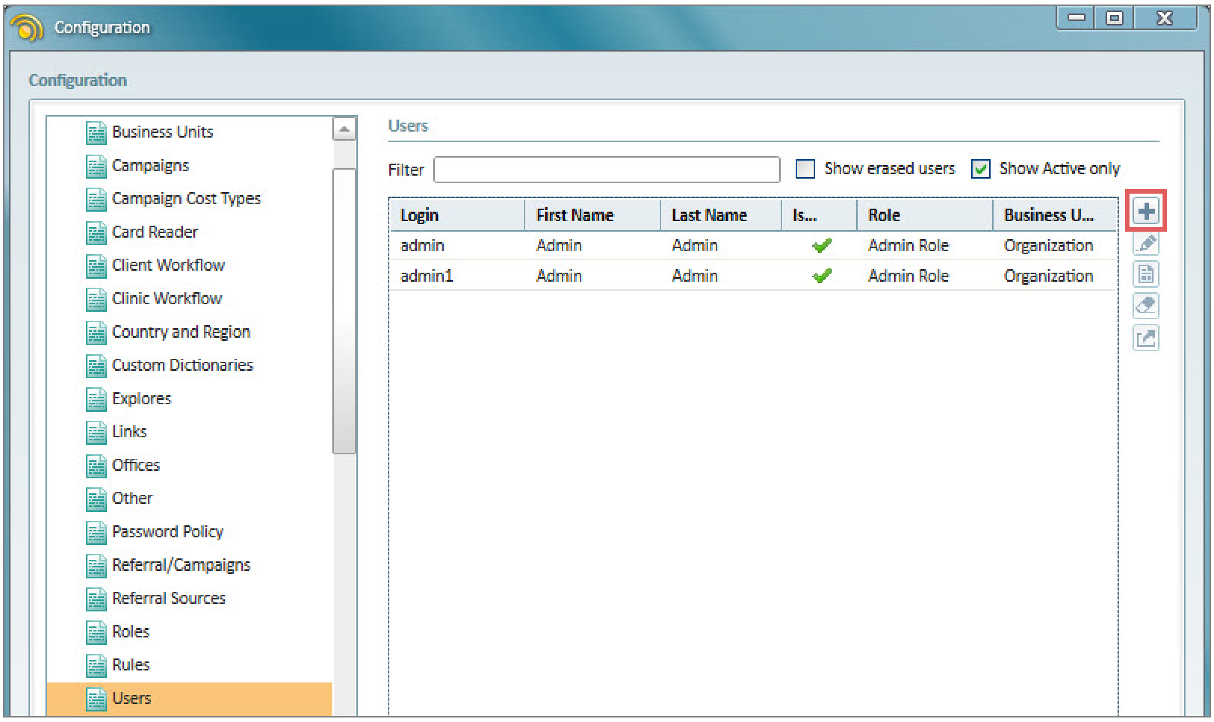

Create New User
Account Data
Login admin1
Password *****
Confirm Password *****
Role Admin Role
Strato on client computers has to be restarted in order to apply changes to user roles.
User Status Active
Business Unit Organization
Scheduler
Is Available For Activities
Is Available For Appointments
Available Appointment Types
Personal Data
User Initials adm1
First Name Admin1
Last Name Admin1
Mobile Phone
Phone
Email
Sign
User ID
Notes
Assigned Offices
Office
Office 10
Office 22
Office 25
Office 30
Office 8546
Working hours
Save
Cancel

To add Working hours:

- Select the Office to be assigned
- Click the corresponding button Working hours
- In the **Edit User Working Hours** window, select the working hours for the User



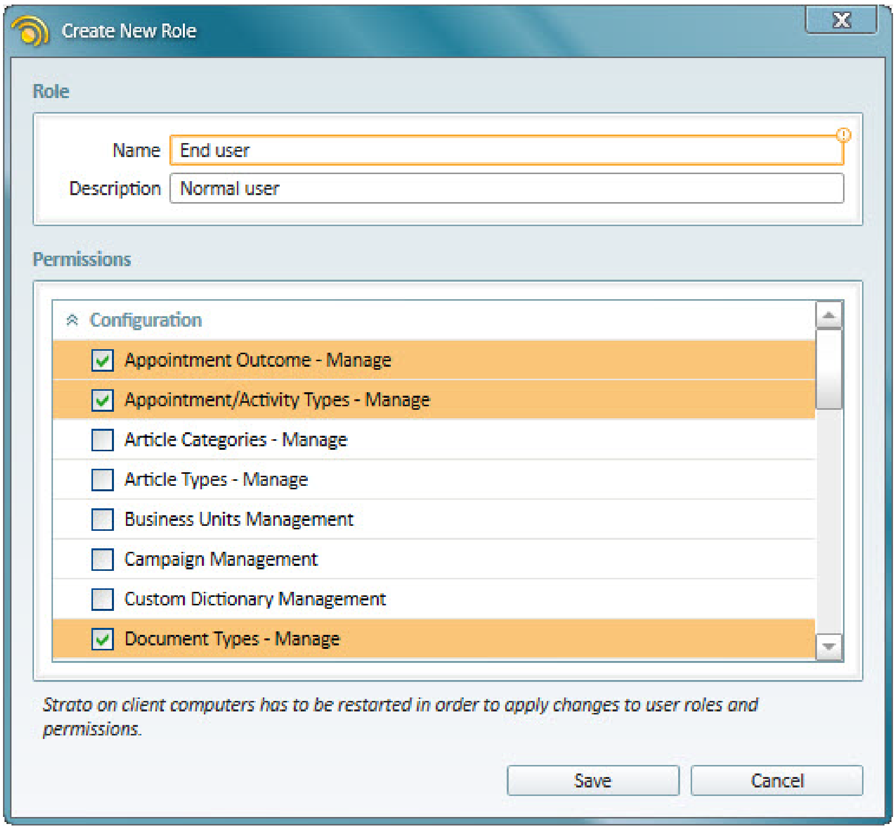
4. Click **Save**.
   - The newly added user should now appear in the list.



To create a user role:

1. Select **Tools > Configuration > System > Roles** and click the ADD () button on the right-hand side.

2. In the **Create New Role** dialog, give a name to the role and activate the permissions by enabling the check-boxes in every section.



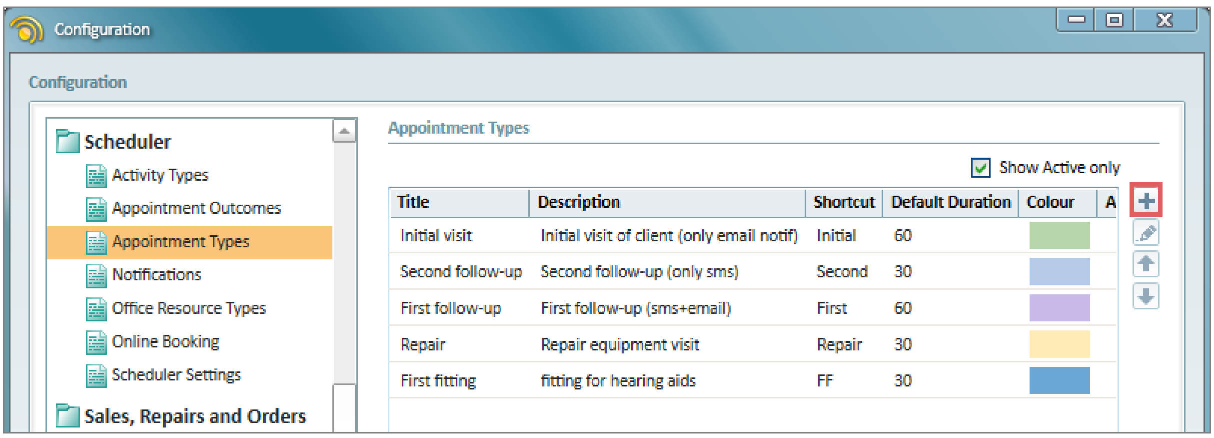
3. Click **Save**. A new role with the selected permissions is added to the list.

3.3 Managing Appointment Types

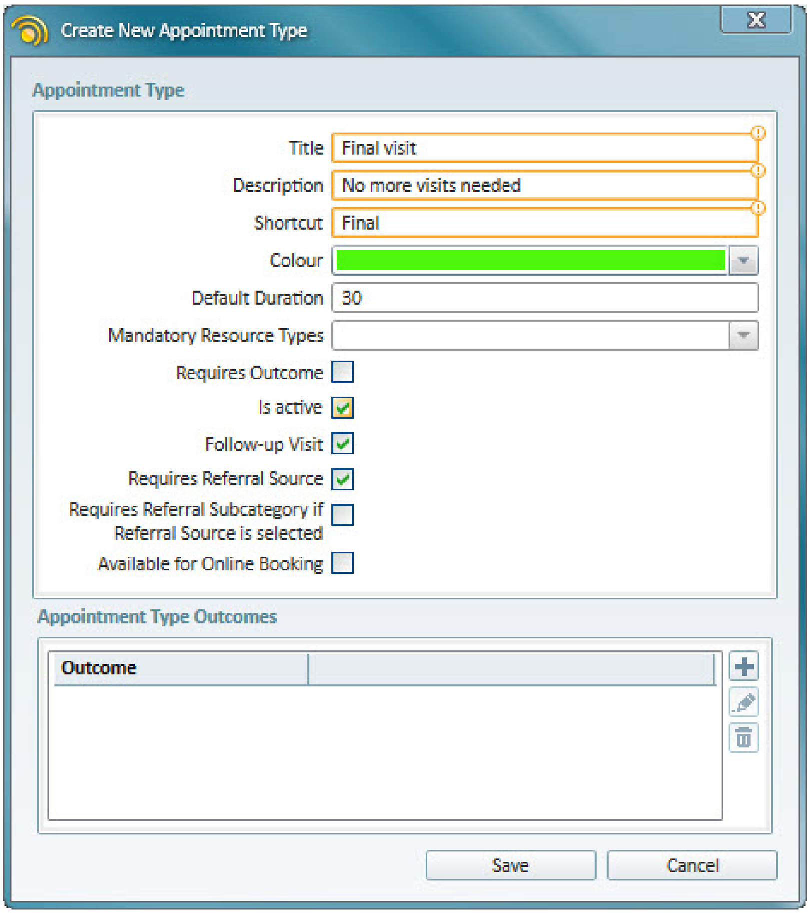
After you created offices and users, it might be important to add appointment types.

To add an appointment type:

1. Select **Tools > Configuration > Scheduler > Appointment types** and click the ADD ( ) button on the right-hand side to add a new appointment.



2. In the **Create New Appointment type** dialog, fill in the required fields (outlined in orange), select the color and enable other options (if applicable). Click **Save**. Your appointment type is now added to the list.



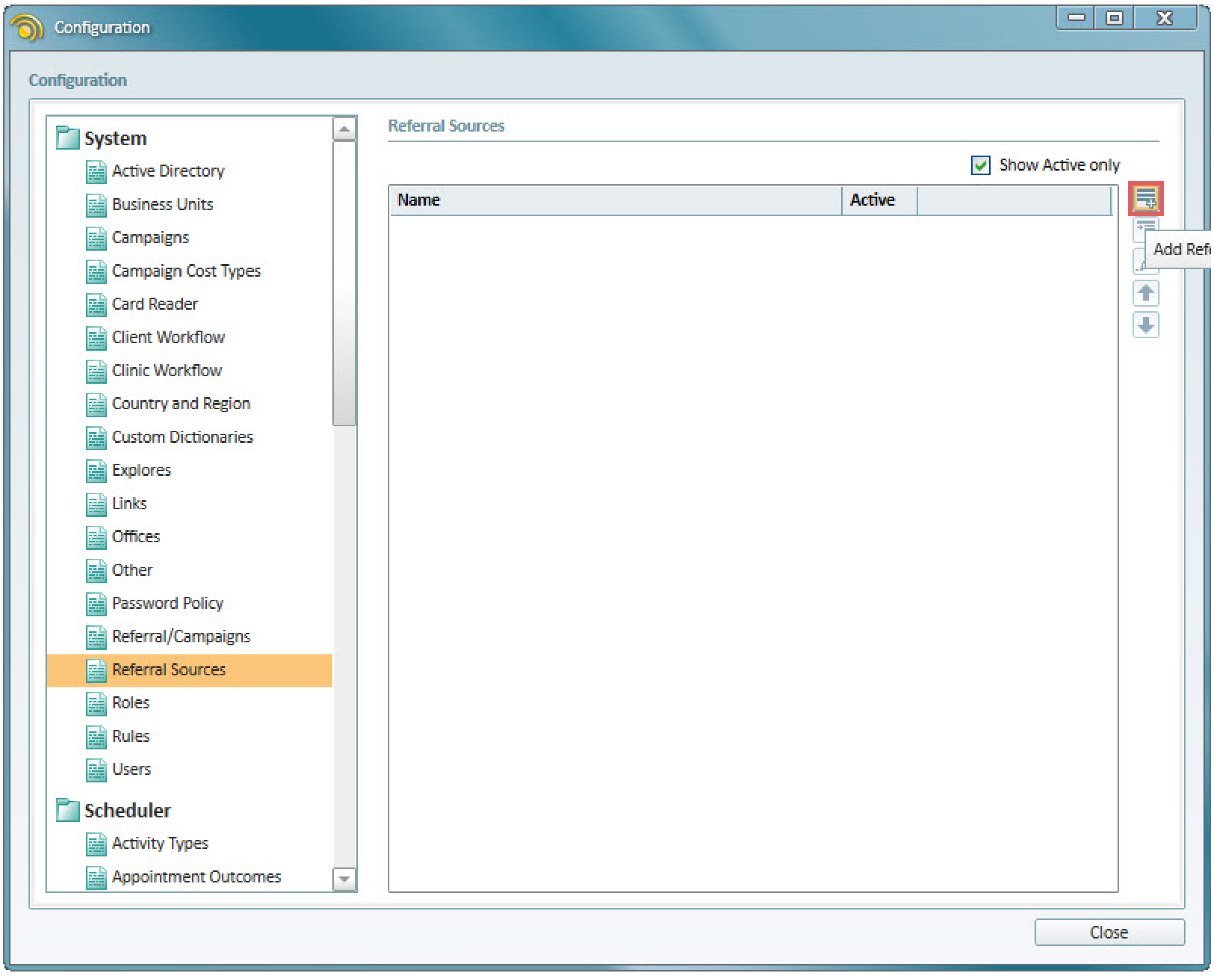
3. To modify an existing appointment type, select the appointment type you want to change and click the pencil icon ( ) in the right-hand side.
4. Use the UP ( ) and DOWN ( ) arrows to change the position of the appointments in the list.

3.4 Creating Referral Sources

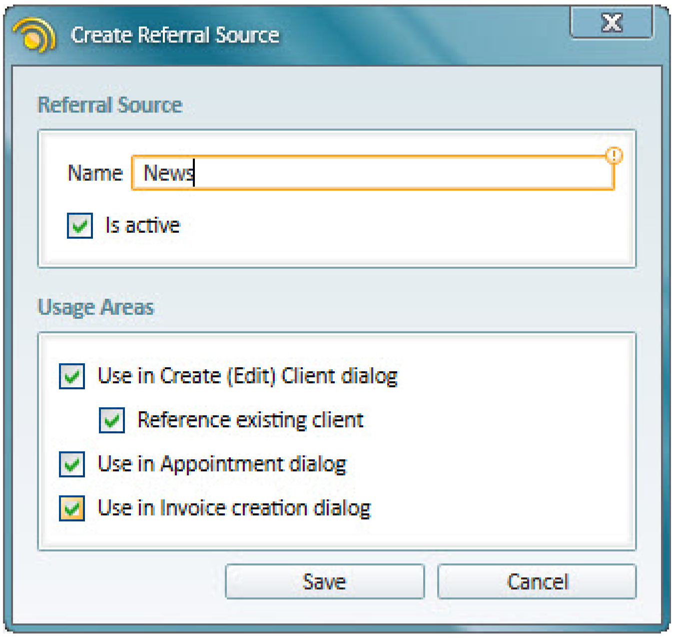
You may create as many referral sources as you want and add subcategories for them.

To create a new referral source:

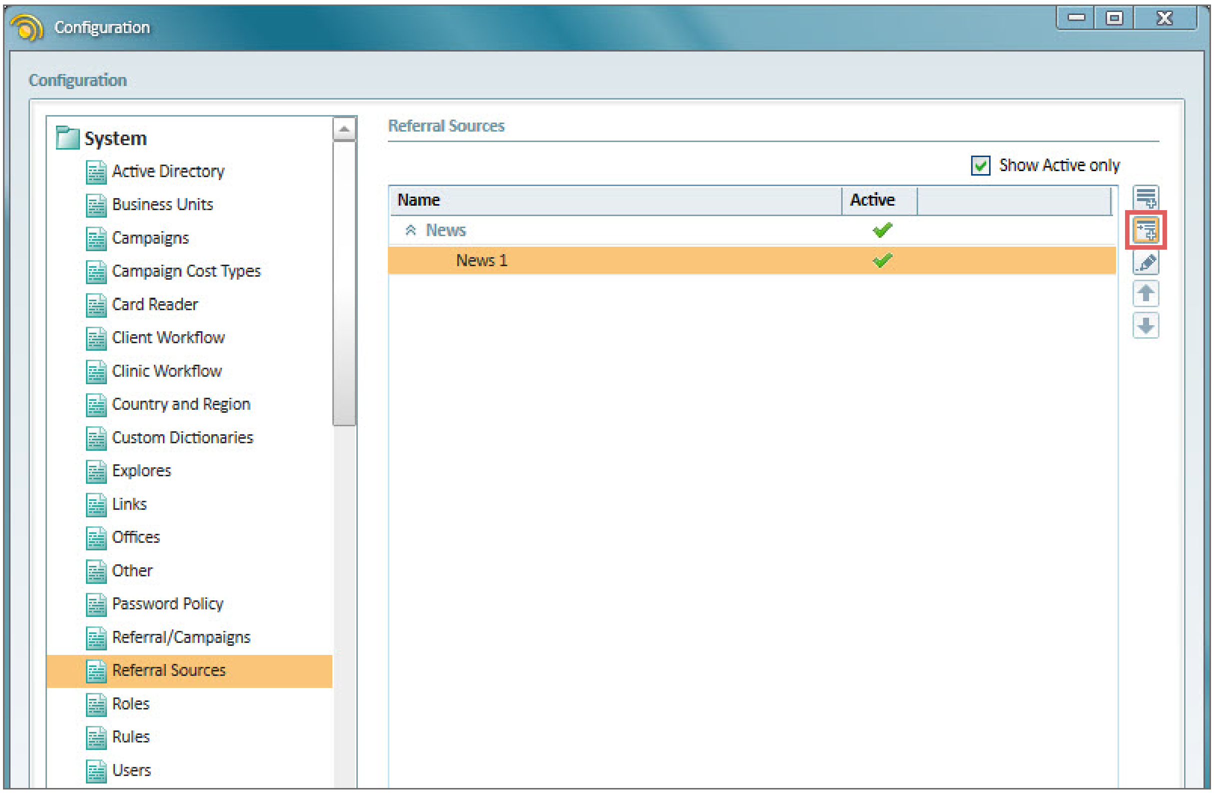
1. Select **Tools > Configuration > System > Referral Source** and click the ADD ( ) button on the right-hand side.



2. In the dialog that opens, enter the title for a new referral source and select whether to make it Active. Optionally, add the required *Usage Areas* and click **Save**.



3. To create a referral subcategory, click the icon , enter the title and save the subcategory. The referral source with the subcategory will look as follows:

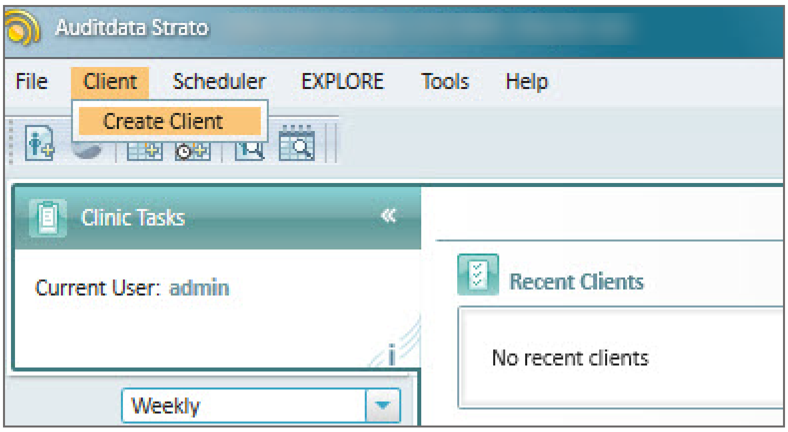


4. To modify either referral source or its subcategory, select the source/subcategory you want to change and click the pencil ( ) icon in the right-hand side.
5. Use the UP ( ) and DOWN ( ) arrows to change the position of the source in the list.

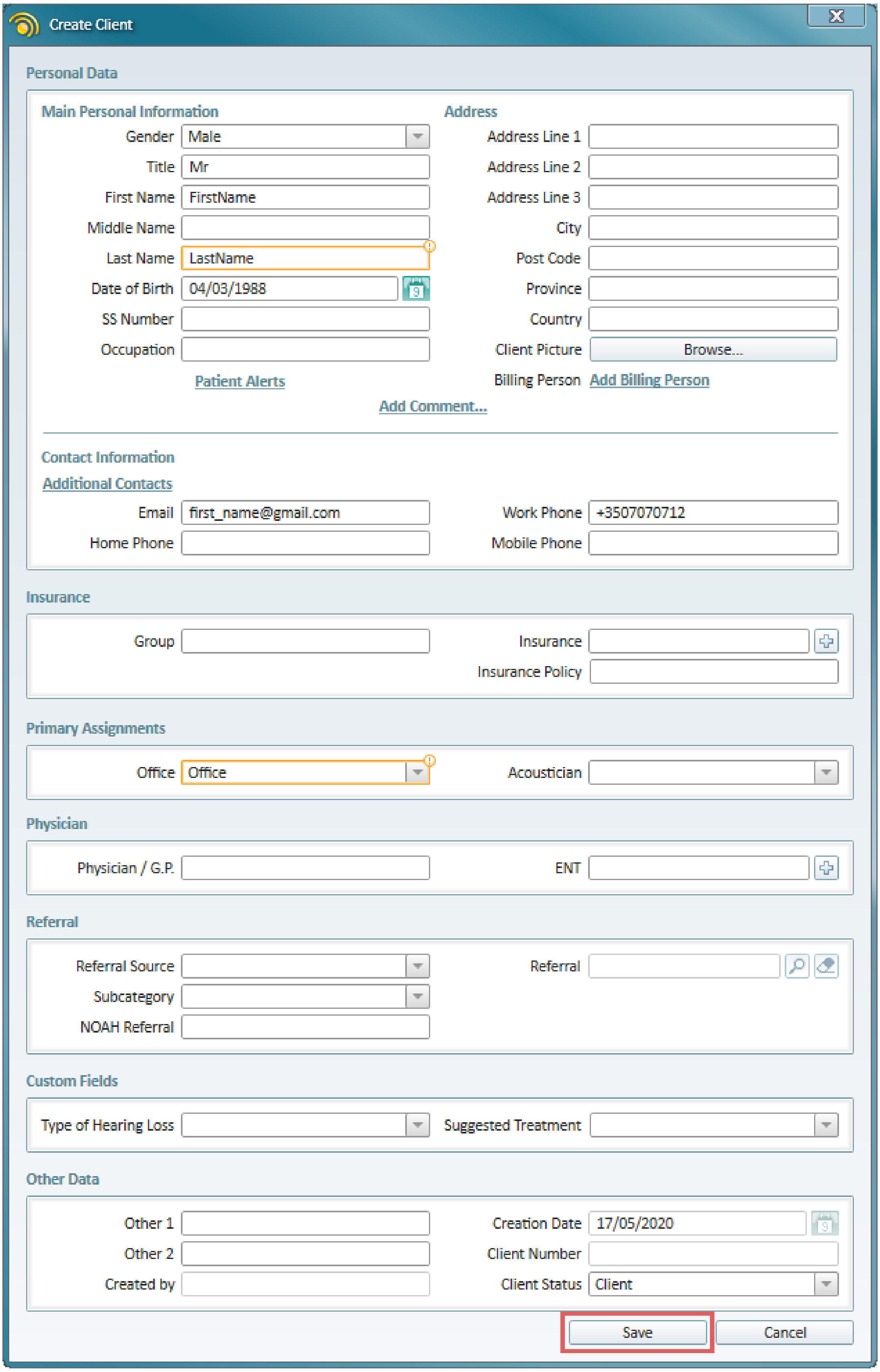
3.5 Creating a New Client

To create a new client:

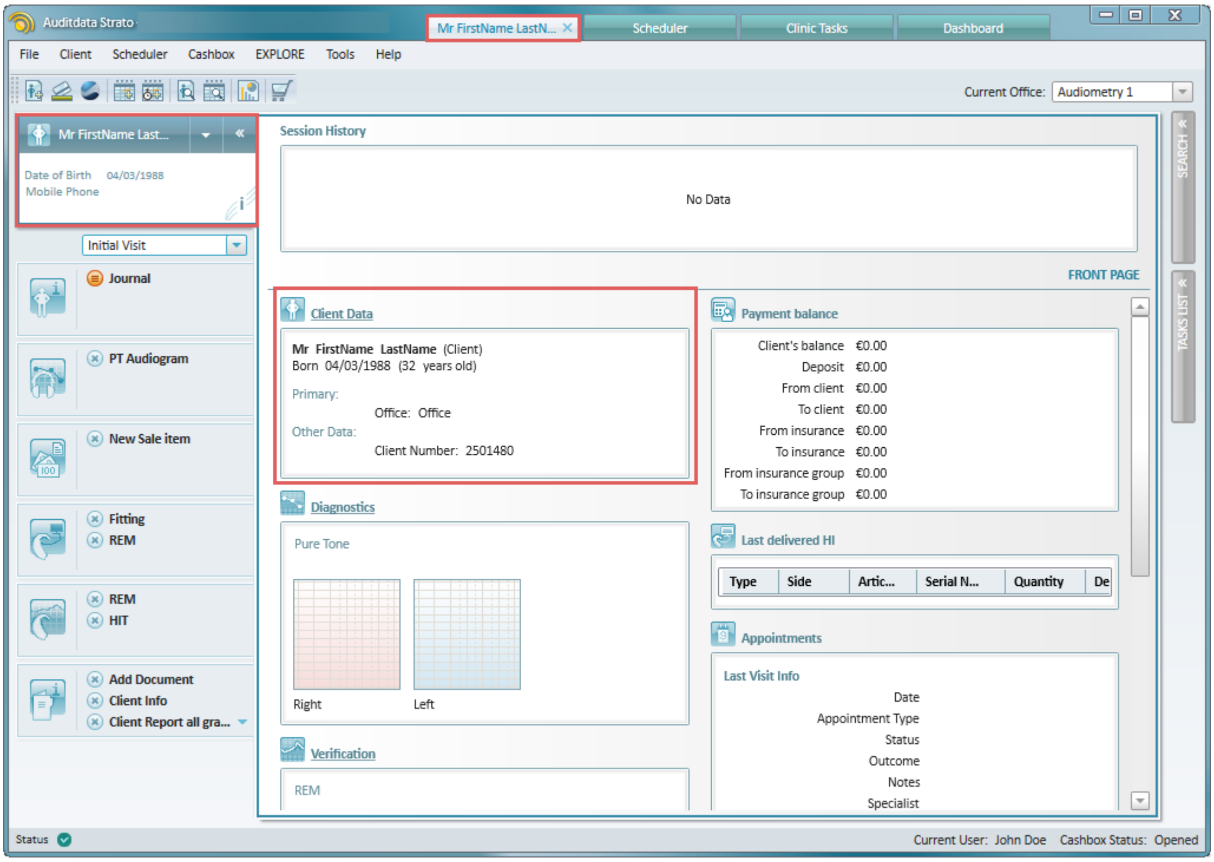
1. Choose **Create Client** from the **Client** menu.



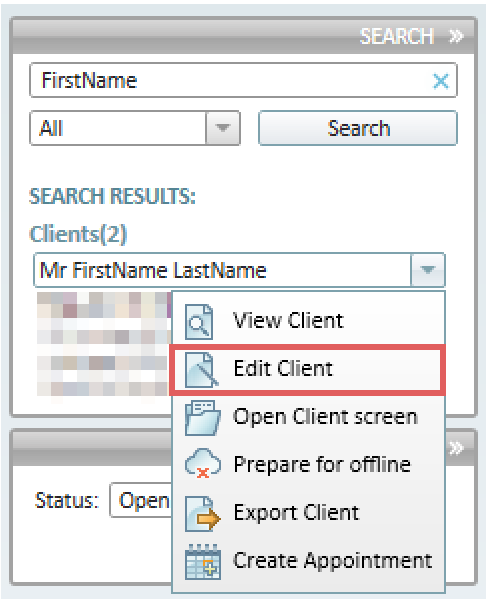
2. The **Create Client** dialog window opens. Fill out the information about a client and then click **Save**.



3. The **Client Screen** for the newly-created client will be opened.



4. If you want to later add more information about the client, you can use the **Search** function to find a certain client and then select **Edit Client**.



5. Alternatively, you can select **Open Client Screen** to access the client's details page and then click the link 

to open the **Edit Client** dialog window.

3.6 Adding Activities

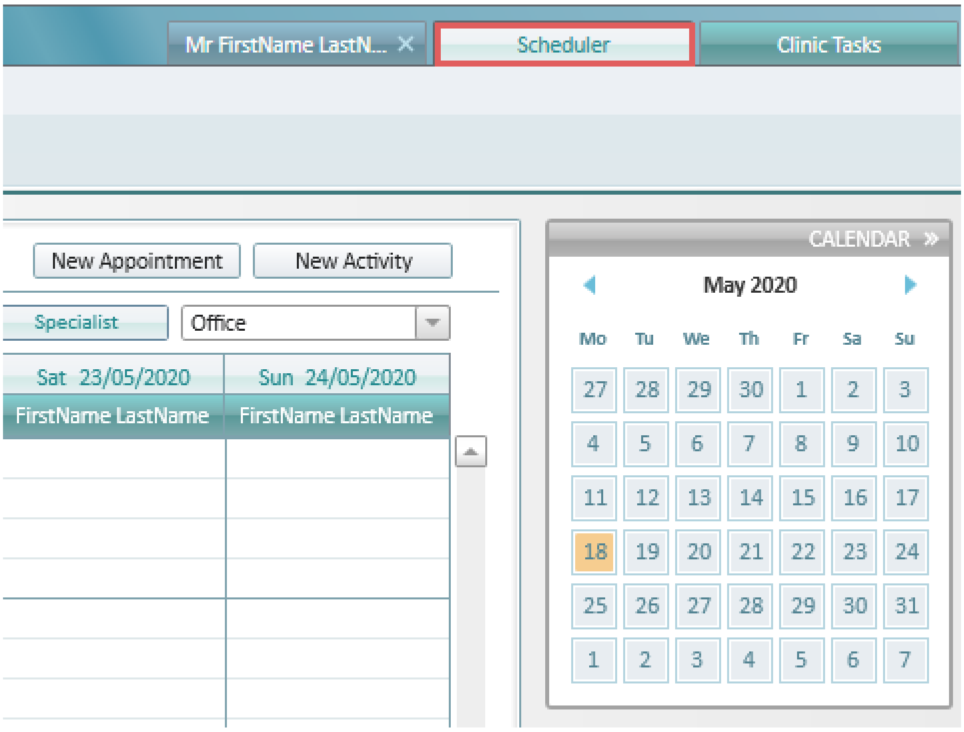
PREREQUISITE: To be able to add an Activity for a user, make sure this user is available for activities. In order to do so:

1. Navigate to **Tools > Configuration > System > Users**
2. Find the user in the list
3. Click Edit to open the User profile
4. Verify if the corresponding setting has been activated

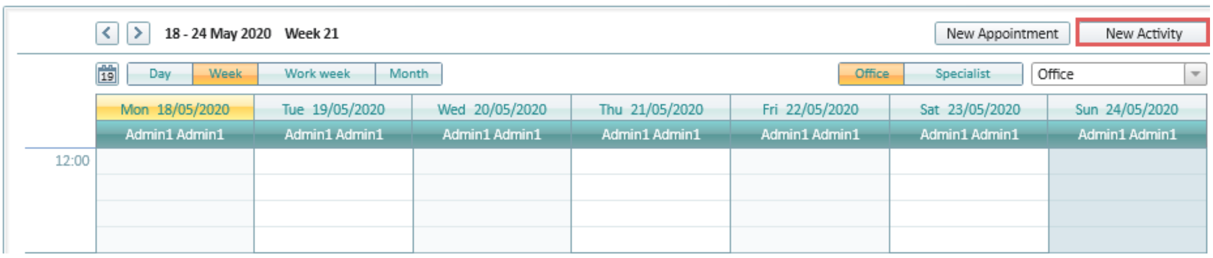
For details, refer to Section 3.2: Adding Users.

To create a new activity:

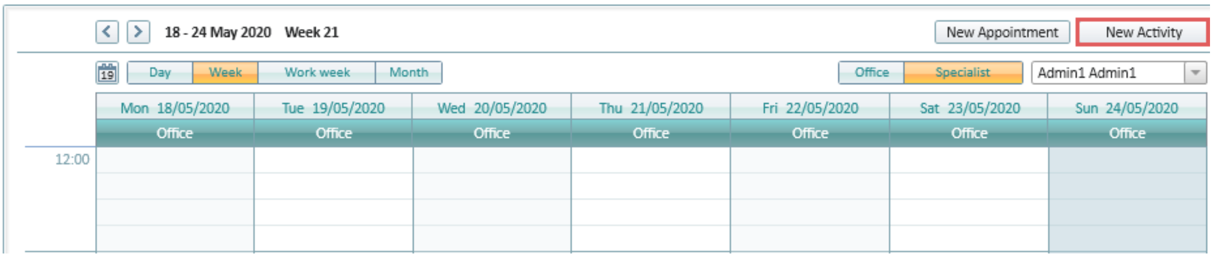
1. Switch to the **Scheduler** tab (located at the upper right corner of the window).



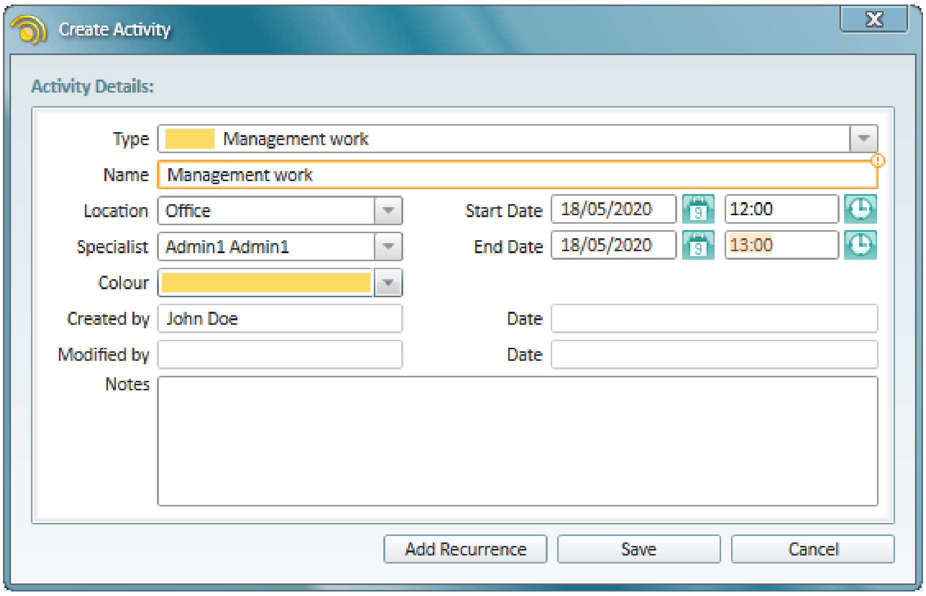
2. You are presented with the **Scheduler** page.
   - By default, it shows the office and all the resources for this office.



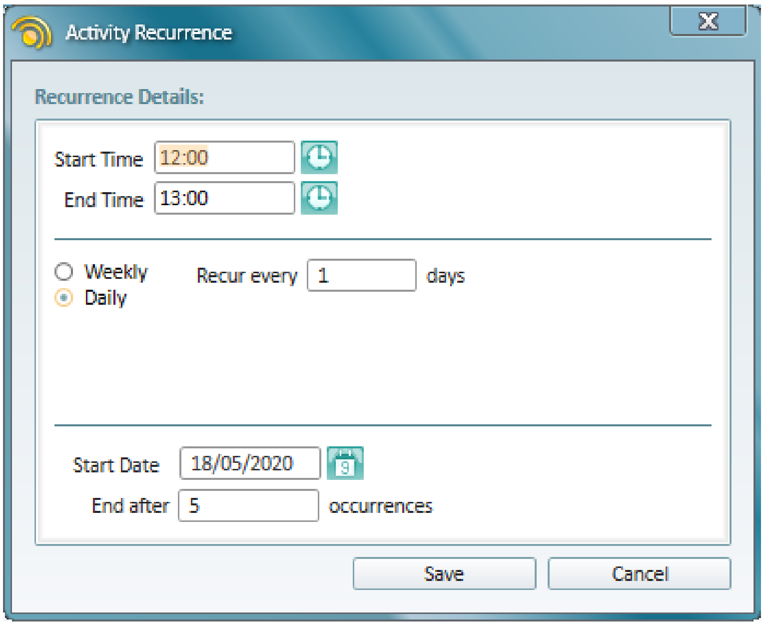
3. You can easily choose to view the scheduler for a selected user by clicking the **Specialist** tab.
   - All offices assigned to this user will be displayed in the scheduler.



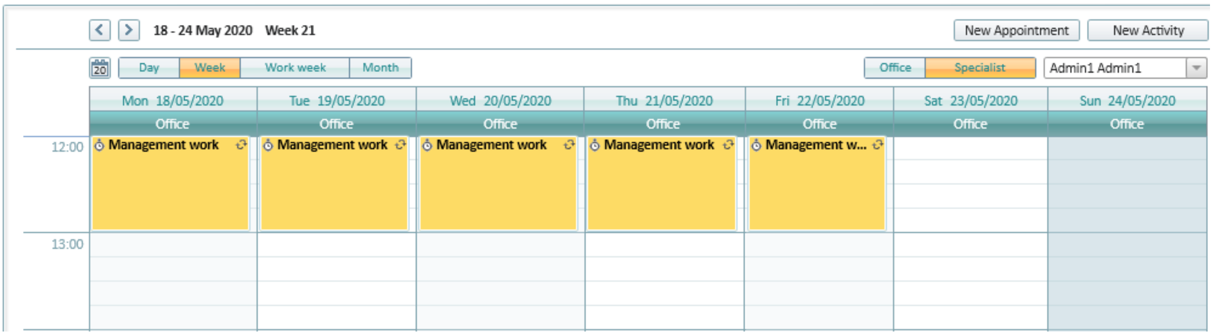
4. Now click the **New Activity** button to schedule an activity. The Create activity dialogue opens.



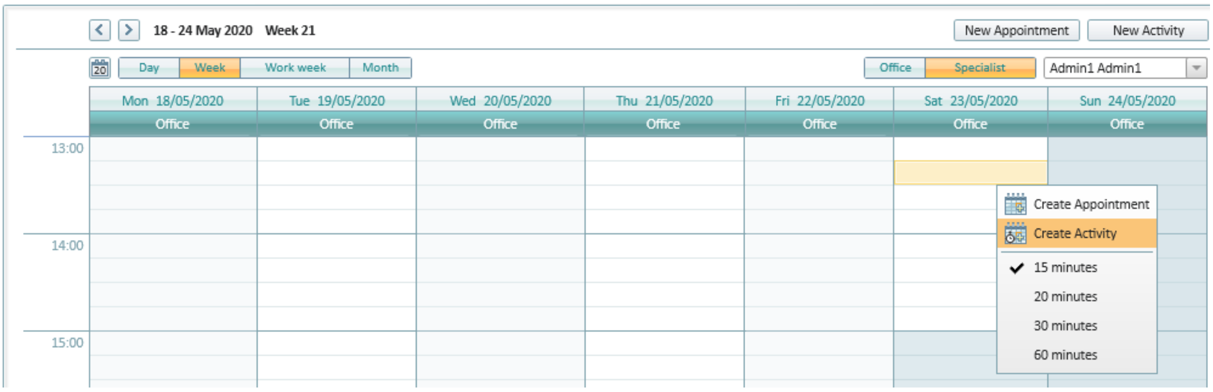
5. Name the activity, then specify the start and end date and time for this activity. Add comments (if any) and click **Save**.
6. If you want the activity to repeat on a regular basis, click **Add Recurrence** and indicate the recurrence period and time. Click **Save** to confirm the recurrence.



7. Your recurrent activity is now added to the Scheduler.



8. Alternatively, you can add a new activity by selecting a preferred day and time directly in the Scheduler and right-click the mouse on this date. Then select **Create activity**.



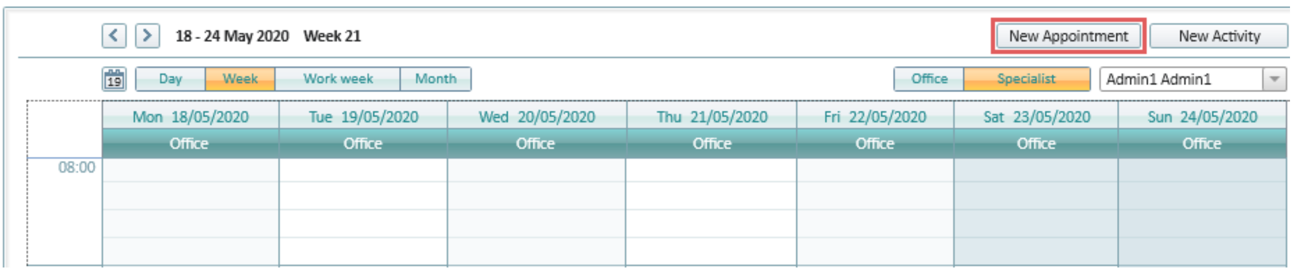
3.7 Adding Appointments

Appointments are created on the same Scheduler page as activities.

PREREQUISITE: To be able to add an Appointment for a user, make sure this user is available for appointments.
In order to do so:

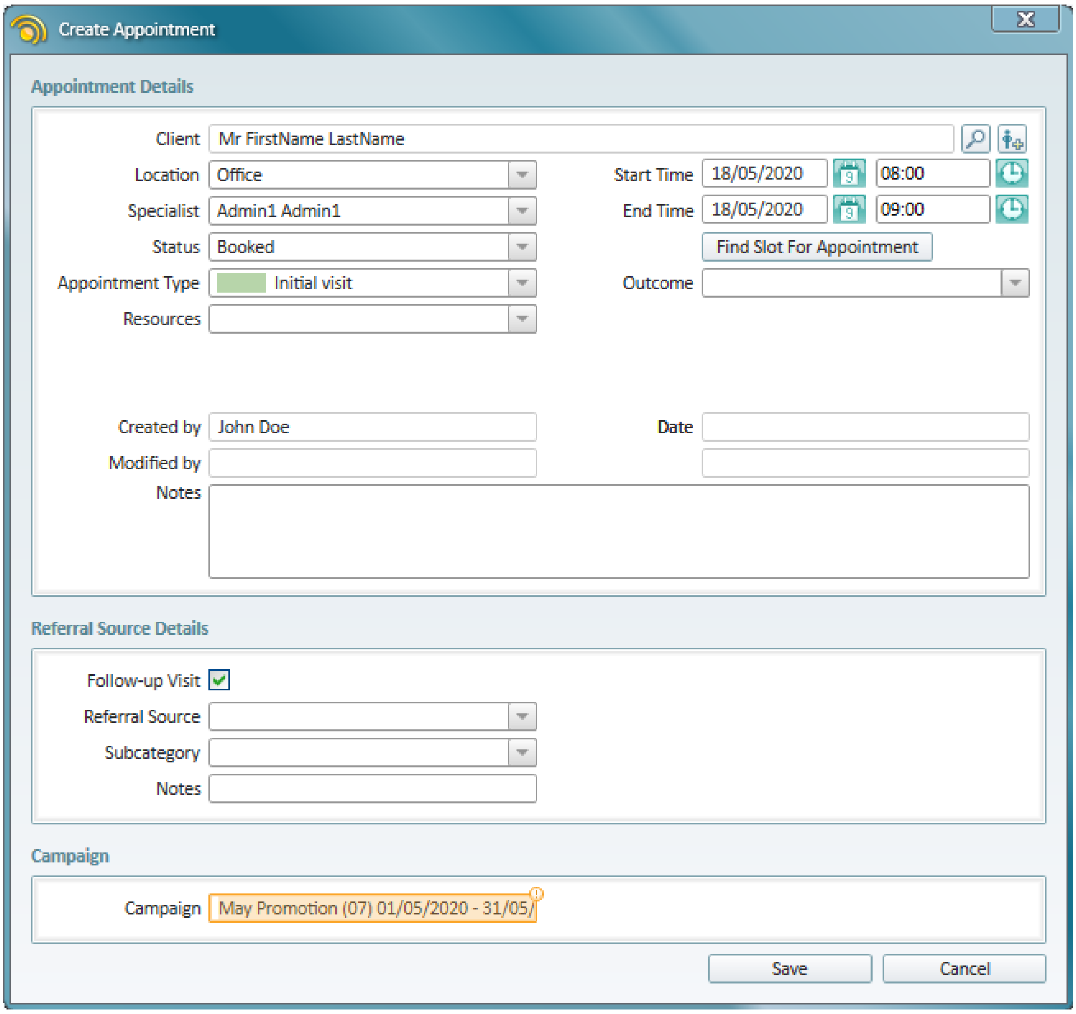
1. Navigate to **Tools > Configuration > System > Users**
2. Find the user in the list
3. Click Edit to open the User profile
4. Verify if the corresponding setting has been activated

For details, refer to Section 3.2: Adding Users.

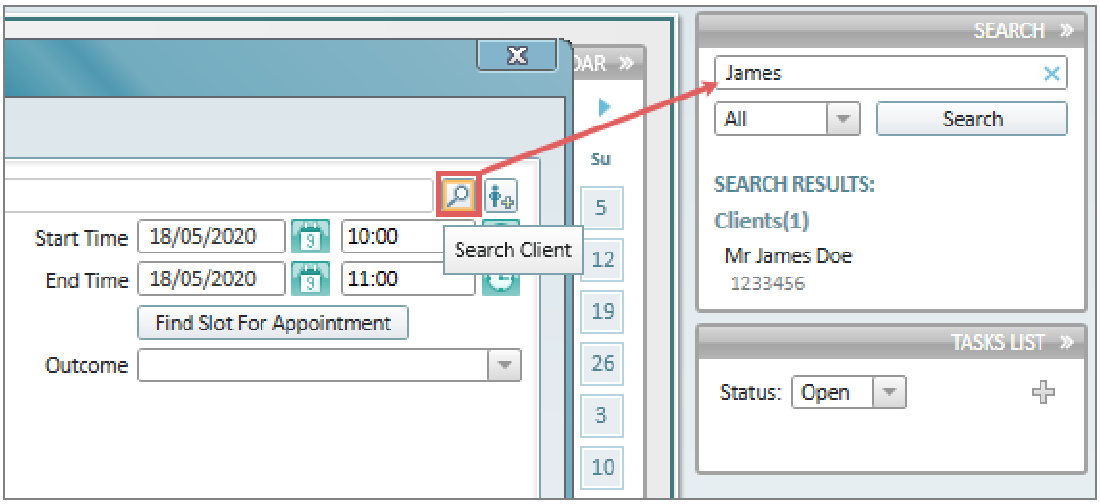


To add a new appointment:

1. Click the **New Appointment** button. The **Create Appointment** dialogue opens.

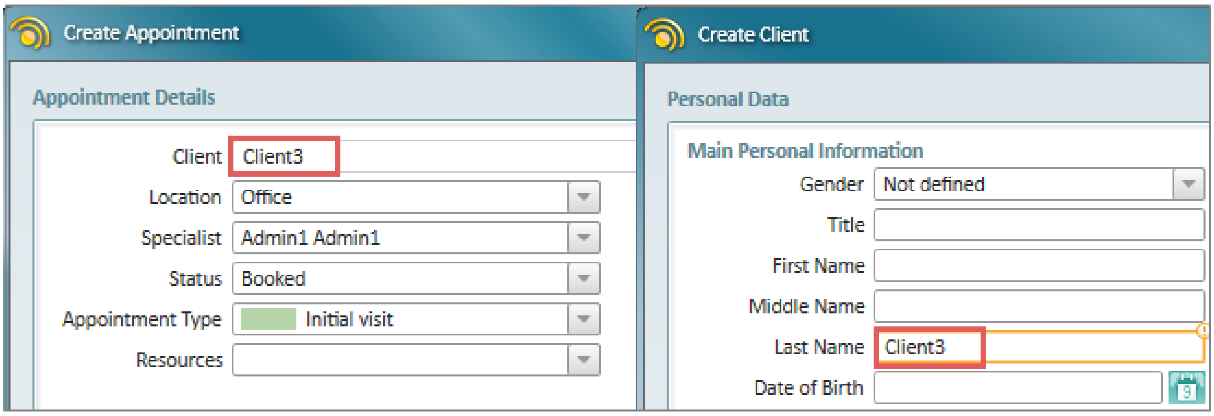


2. Select the office, a type of appointment, and a start and an end date-time of the appointment.
   - To select a different client, click the **Search Client**  icon and the cursor will automatically switch to the search panel in the right.

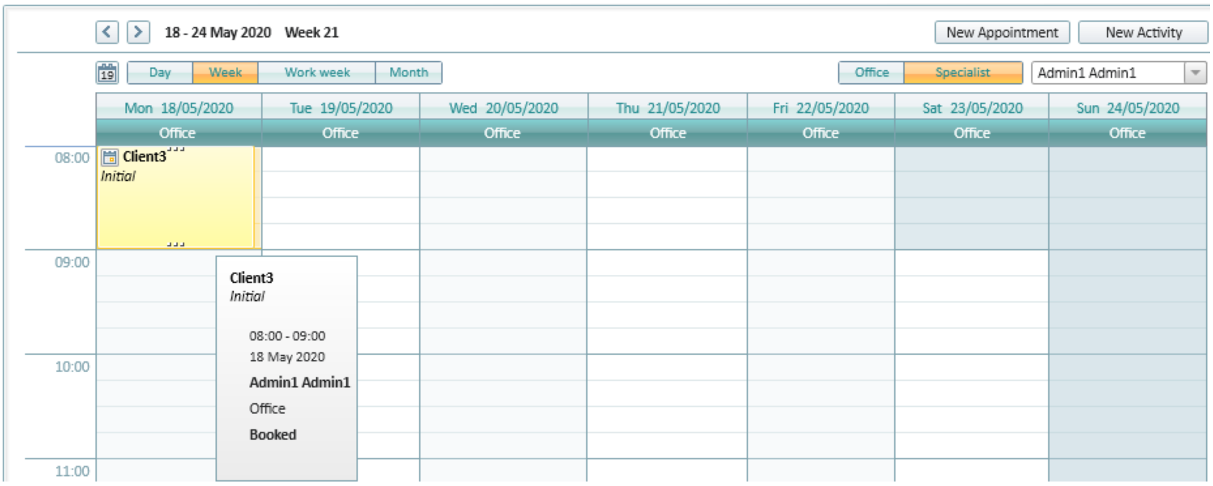


3. You can also create a new client directly from this window by clicking the **Add New Client** icon.

   The **Create Client** dialogue opens.
   - Fill out the client's data and click **Save** when done.
   - The client in this appointment will be changed to a new one you just created.



4. Specify other appointment details (if applicable) and click **Save** to add an appointment. Your appointment appears in the scheduler. Mouse over the appointment to see the details.



5. Alternatively, you can add a new appointment by selecting a preferred day and time directly in the scheduler and right-click the mouse on this date. Then select **Create Appointment**.