What's New

Strato Version 2.5

Strato

auditdata
Your Partner in Audiology Solutions

1 Introduction

The purpose of this document is to give you an overview of the new and modified features in Strato 2.5.

The available languages are English UK, Danish, Swedish, Norwegian, Spanish, Polish, Mandarin (Traditional), German and Finnish. Strato v.2.5 is certified to NOAH 4 and works with Noah v.4.9.

2 Integration with Azure Active Directory

2.1 General

With this new Enterprise level feature, you can now manage user access to Strato with Azure Active Directory (Azure AD). Azure AD is a Microsoft's cloud-based identity and access management service that gives you control over the authentication policy in your organization.

After acquiring Azure AD, your system administrator needs to create AD users and assign them into groups, essentially building the company user hierarchy. Strato has its own hierarchy with users and permissions-based roles assigned to them. Now you can integrate the Strato application with Azure AD to control access to Strato based on your business requirements.

Once Azure Active Directory is up and running, the next steps are to:

1. Register the client application (the Strato app) and the service application (a Web API resource you want to access using Strato).
2. Grant necessary permissions to the service application.

Please refer to the Microsoft website to get more information on Azure AD.

2.2 Azure Active Directory Set-up in Strato

To set up Azure AD in Strato:

1. Go to **Tools** > **Global Settings** > **Active Directory**.
2. Select the **Enable Active Directory** check box.
3. Enter the following information:

- **Directory ID** - unique ID for each Azure AD tenant
- **Application AD Instance** - https://login.microsoftonline.com/
- **Graph Resource ID** - https://graph.windows.net
- **Client Application ID** - available after registering the client application
- **Client Homepage URL** - home page of the application
- **Service Application ID** - available after registering the service application
- **Application Name** - name of the service application
- **Service Application ID URI** - can be obtained from Azure AD
- **Secret Key** - generated on the Azure portal
- **Admin Role Group ID** - ID of the Azure AD administration group. Must be mapped to the **Admin** role in Strato.
- **User Role Group ID** - ID of the Azure AD user group. Must be mapped to the **User** role in Strato.

  Note: If you are configuring AD in Strato, your Azure user must be a member of the administration group.
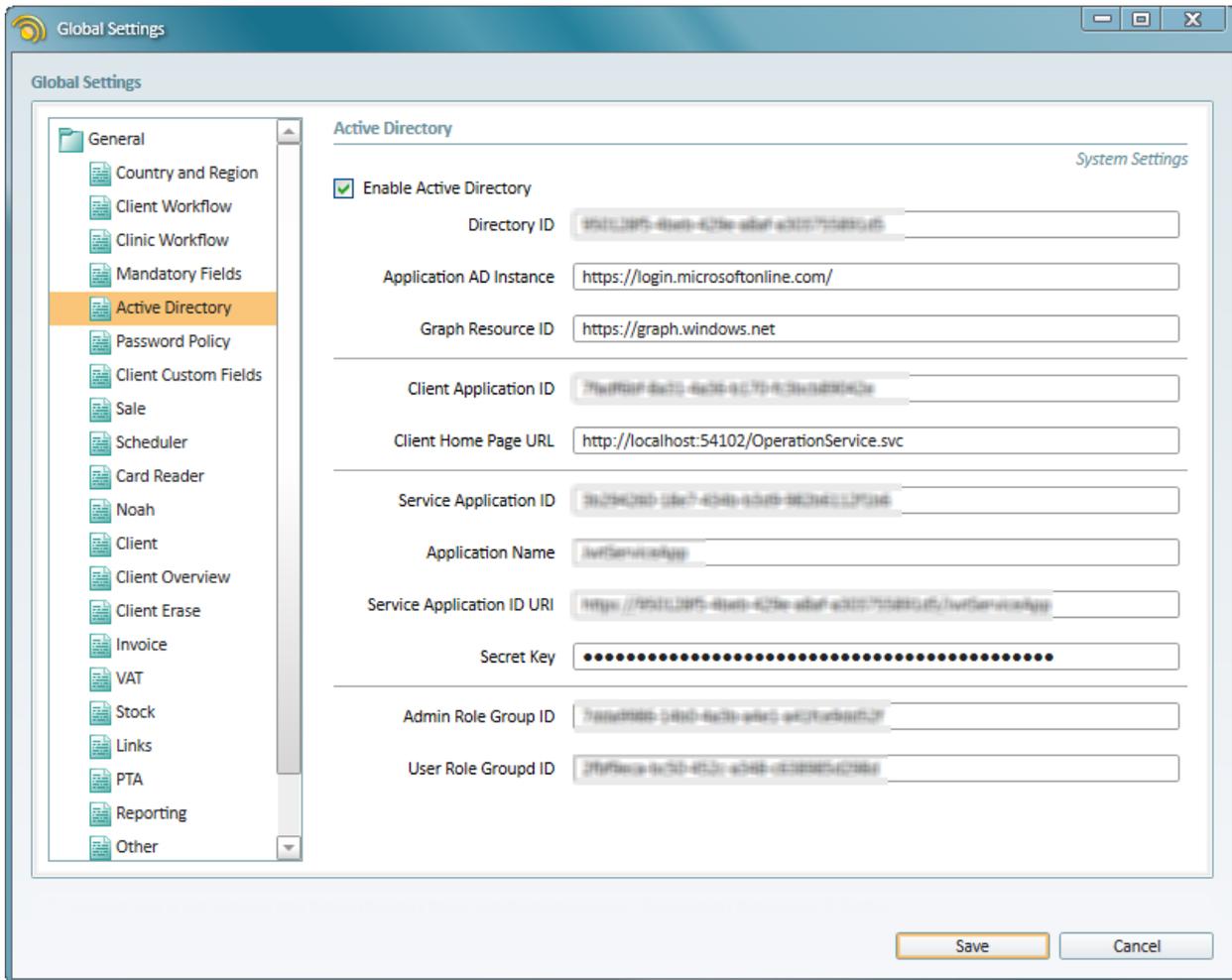
Click **Save** to finish the configuration.

2.3 Mapping AD Users and Groups

Azure AD users need to be mapped to the users in Strato, while AD groups are mapped to the Strato roles. To map an AD user to a Strato user:

1. Open **Tools** > **Administration** > **Users** and click the **Edit User** button.

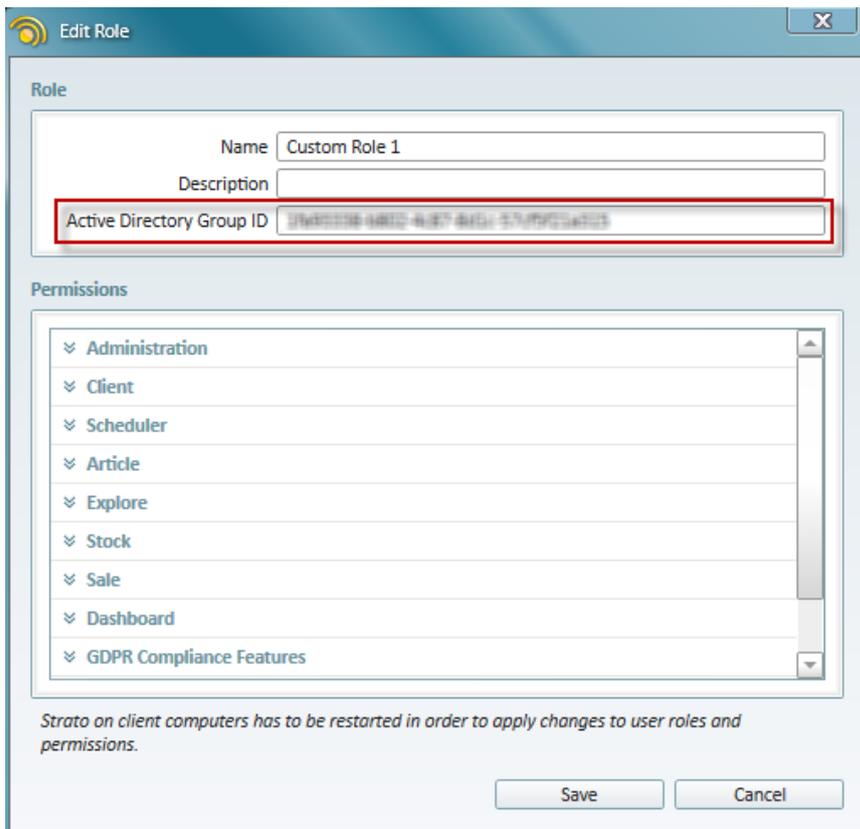2. Locate the **Active Directory ID** field and enter the ID.

3. Click **Save**.

This Strato user is now successfully mapped to the Azure AD user.

Mapping AD group to a Strato role is similar:

1. Open **Tools** > **Administration** > **Roles** and click **Edit**.
2. Locate the **Active Directory Group ID** setting and enter the Azure group ID.

3. Click **Save**.

By default, the Active Directory ID fields for roles and users in Strato will be empty. However, they will be automatically filled in for the **Admin** and **User** roles in Strato once you successfully activate AD functionality.

In the Azure AD mode, users cannot assign roles to themselves using Strato UI. As an administrator, you copy a user ID from Active Directory and enter it for the Strato user. If they are part of the group mapped to an existing Strato role, this role will automatically be assigned to this user.

Note: Offline mode is not supported with active Azure AD.

3 Order Module

Strato features a new Order module allowing you to create and receive orders for items delivered to or from your suppliers. With varying delivery times, multiple suppliers and changing business needs, it is crucial to be able to manage the supply process for your business. With Strato orders, you can easily track all the incoming and outgoing orders for the seamless flow of your operational activities.
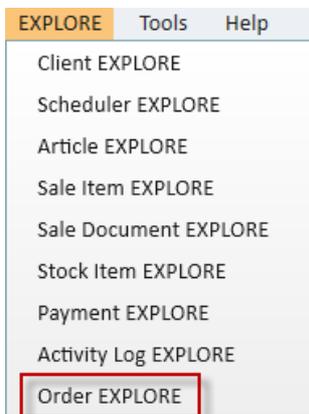
3.1 Creating orders

There are two ways you can create orders in Strato:

- Order EXPLORE
- Customer's **Sale** tab

To create an order from the Order EXPLORE view:

1. Go to **Tools** > **Order EXPLORE**.

2. Next click **Create Order** or **Create Credit Order** from the top Navigation pane. Credit Order means that you intend to deliver certain items to a supplier.

3. The *Create Purchase Order* window is displayed where you can: select the supplier, receiving office and set the date of order.
4. Proceed by adding the articles you wish to order from this supplier, specify their quantity and enter the estimated delivery date.
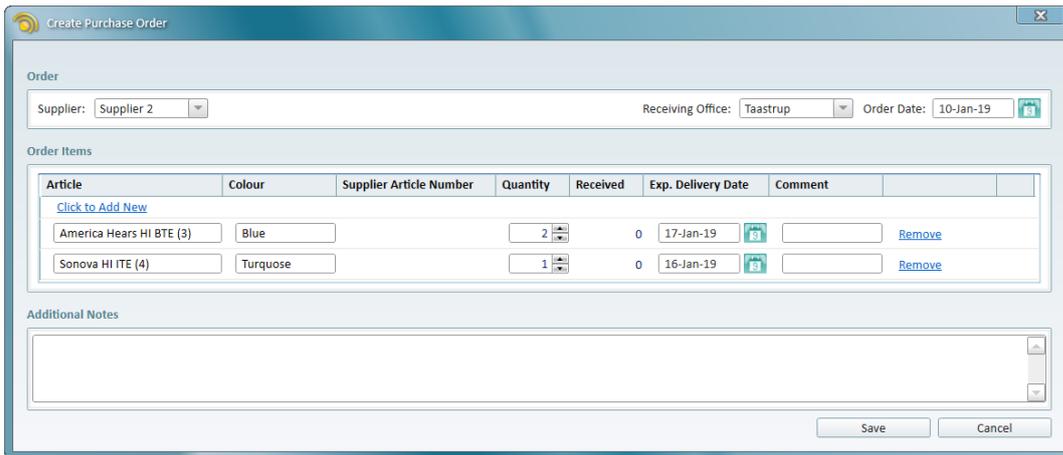
5. Click **Save** to complete the procedure.

You can add multiple articles for your order and specify different delivery dates for each item. That helps to track your upcoming orders with ease.

There are certain restrictions for the articles that you can order:

- articles must have the setting **Available for order** enabled
- articles must be of the *Inventory* type
- disabled articles cannot be ordered.

Note: The system will display a warning if some of the items do not belong to the supplier you have specified. You can still proceed with this order by clicking **OK**.
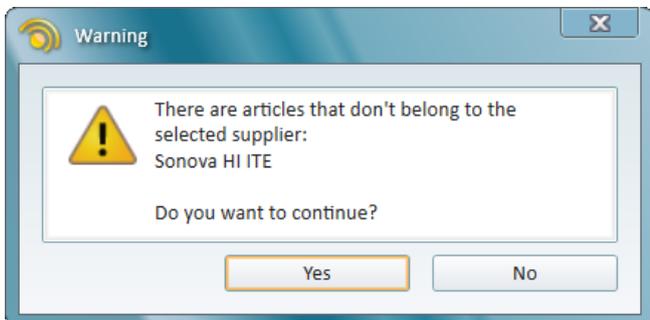
Another way to create the order in Strato is to open the customer's **Sale** tab and add articles to their current sale. Select the articles you wish to order and the **Order** button becomes active.
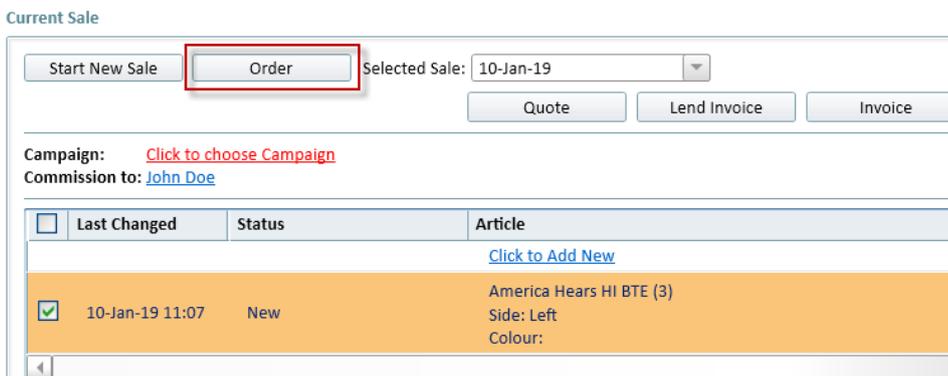
Next steps are similar to when you create the order from the EXPLORE view. The difference is that the order created from here will list only those items which you have selected from the customer's current sale session. You will not be able to add or remove them from the order.

After creating the order, the item's status in the current sale section will change to *New (ordered)*.

Note: If you are creating multiple items order from the **Sale** tab and specify different suppliers, then one order per each supplier will be created. Orders created from the Order EXPLORE view can only have one supplier.

You can view all the active orders for a client by clicking **Orders** on their **Sale** tab.
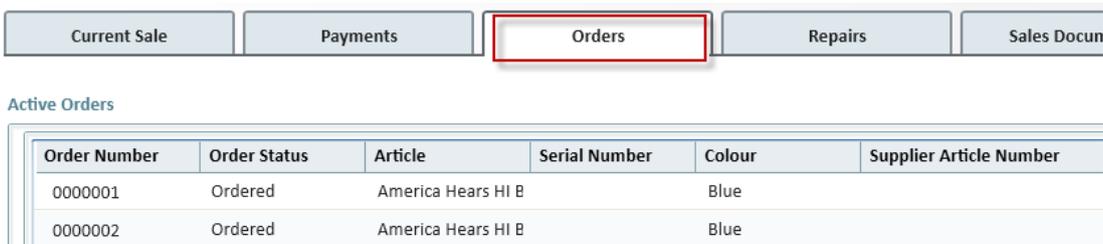
When creating credit orders, you send back to the suppliers the articles that you do not need. Hence, you can add only those articles that are already in your stock. Such orders will be of *Returned* status.

3.2 Modifying Orders

Open Order EXPLORE and click the order number. A list of options is displayed where you can select **Cancel Order**.
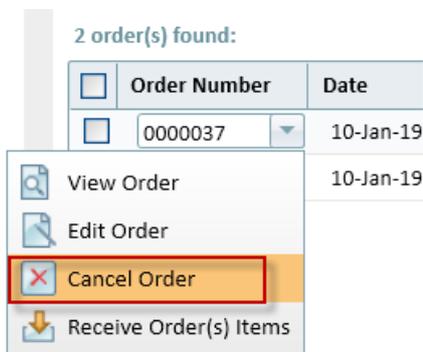
You can only cancel orders with the following statuses: *Ordered* or *Partially Received*.

Editing orders can also be done from the Order EXPLORE. Use the **Edit Order** option to add new articles to the order or remove the existing ones. Complete the procedure by clicking **Save**.

3.3 Receiving Order Items

Once the suppliers deliver the ordered articles, you can proceed to receiving them. This is very similar to when you add new stock item from the Stock Item EXPLORE view - the stock is updated as you receive the articles.

When receiving non-serial numbered articles you need to specify the quantity of delivered items, for the articles with a serial number - you specify both quantity and the corresponding serial numbers.
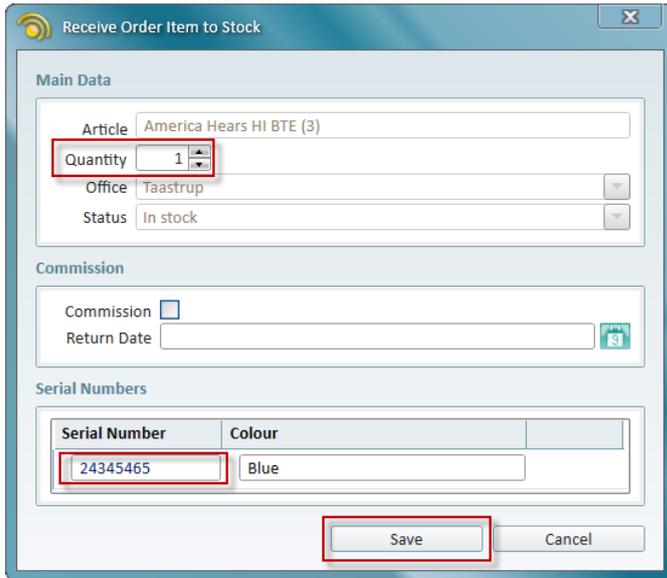
To receive an order:

1. Go to the Order EXPLORE, click the order number and then select the **Receive Order(s) Items**.
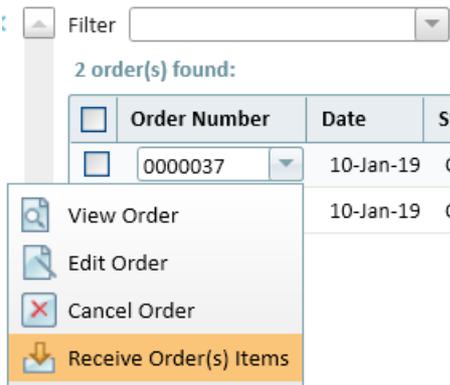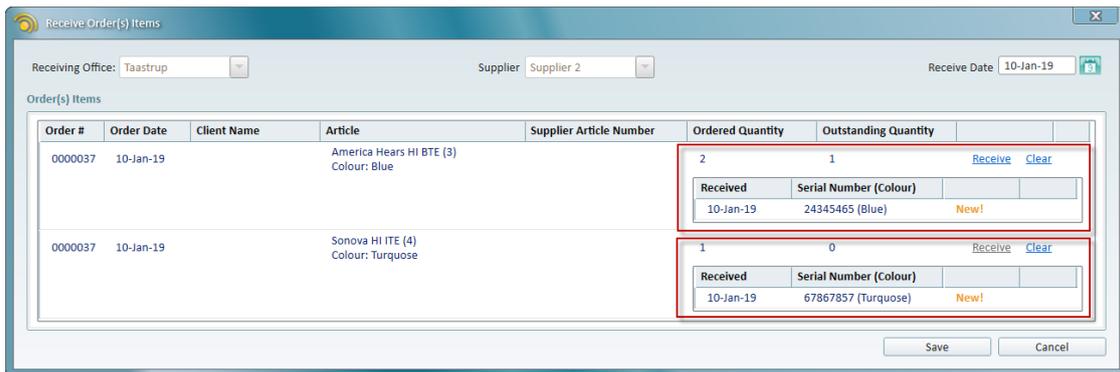

2. In the window that opens specify the Receive Date and then click **Receive** for the necessary item.

3. Next specify the quantity (can be more or less than ordered), add serial number (for serial number items) and click **Save**.

4. You can now see how many articles you have received and also view the outstanding quantity - articles yet to be received.

Orders can have the *Partially received* or *Received* status, depending on whether all items have been received. If you receive more items than was originally ordered, the order will have the *Received* status as well.

Once you receive all items from the order, the **Receive Order(s) Items** option becomes inactive.

3.4 Tracking Orders

You can track not received or partially received orders for every client on their dashboard. Orders with the passed expected delivery date will be coloured red so that you can take the appropriate action.

If you have an appointment with a client for today, but there are active orders for this client with the expected delivery date in future, you will see a notification that these items will not be delivered by the appointment's time.
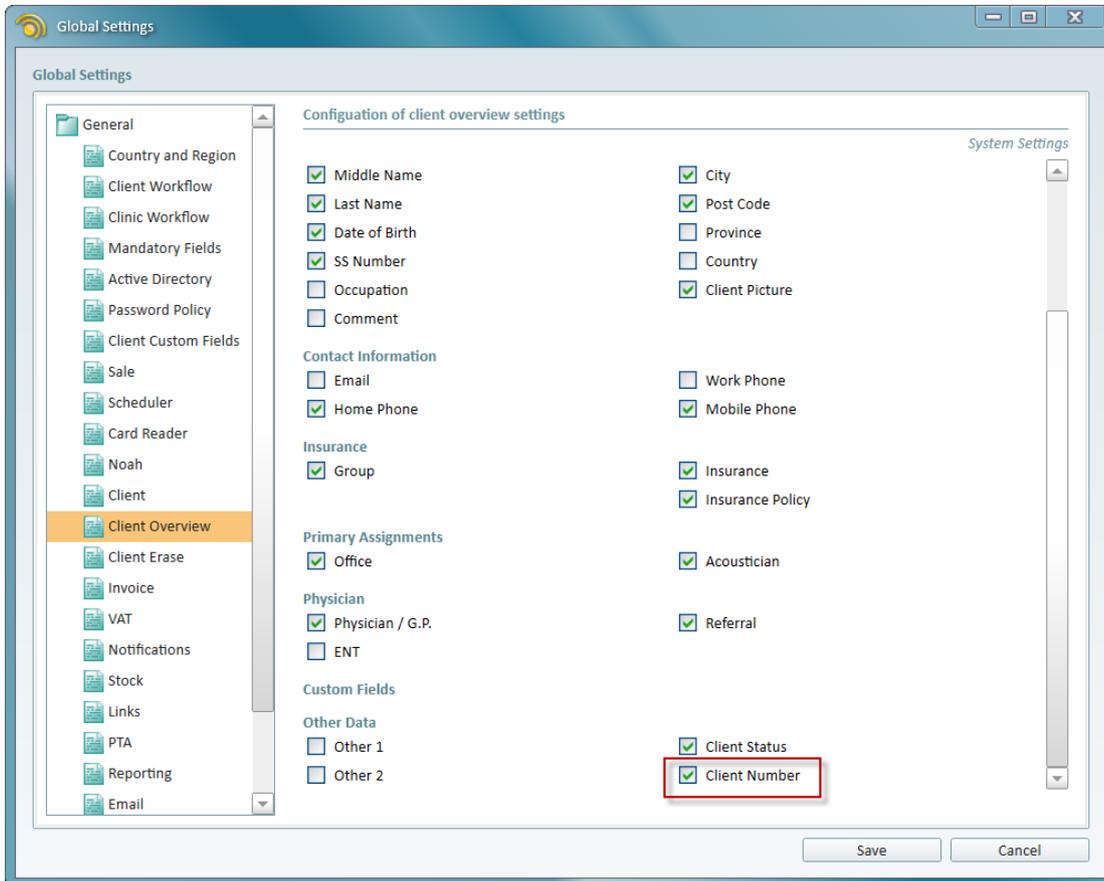
4 Other Improvements

4.1 Show Client Number on Client Screen

We have added the new option to show the client number on the client screen. Go to **Tools** > **Global Settings** > **Client Overview** and select the **Client Number** check box.


Save the changes and then open the client screen. The client number is now displayed in the *Client Data* section.

4.2 Export Sale Documents in PDF

You can now choose the format for exporting your sale documents. Go to **Tools** > **Global Settings** > **Sale**. The *Sale documents export format* selection list contains two available options: PDF and XPS (used to be the only available option).
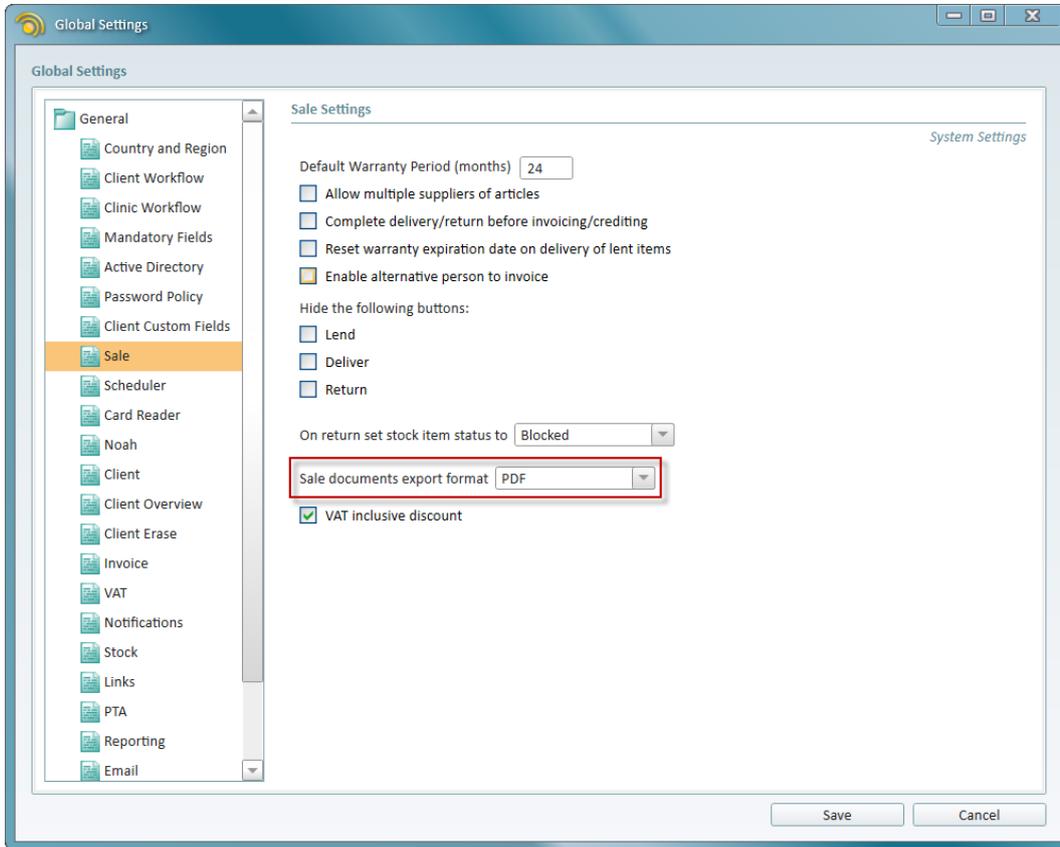
Select the format you prefer and save the configuration. Now all documents you print from the **Sales Documents** section of the client's **Sale** tab will be printed in your preferred format.

## 4.3 New Search Parameters for Sale Documents

It is now possible to search for sale documents using the Insurance and Insurance Group search parameters. Open the **Clinic Tasks** tab and go to **Sale Document EXPLORE**. There is a new parameters group called **Insurance** in the left-hand pane. Click it to display two available filters: searching documents by **Insurance** or **Insurance Group**.
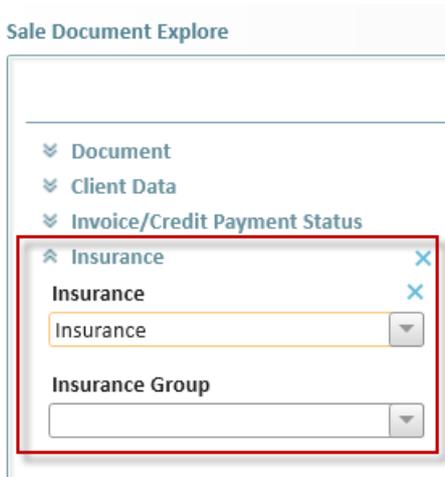
We have also added Insurance and Insurance group as visible columns.

4.4 Possible to Apply VAT to Discount

With the new **VAT inclusive discount** option found under **Tools** > **Global Settings** > **Sale** it is possible to specify whether VAT rate is only going to be applied to the price of the item including or excluding discount.
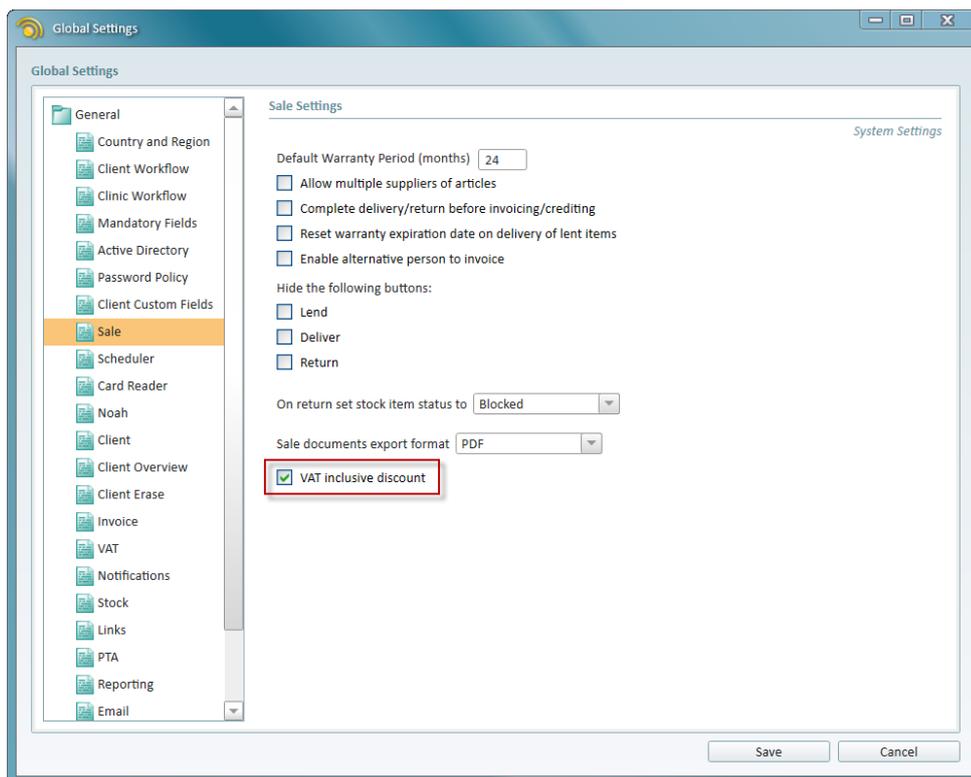

## 4.5 Improvements When Deleting and Erasing Clients

Using the new filter for deleted customers, you can view deleted clients by absolute or relative dates of deletion. To do so, go to the Client EXPLORE view and select **Deleted Clients** from the left-hand pane. Select the **Show deleted clients** check box and set the date range. Clicking **Search** will display the deleted clients.
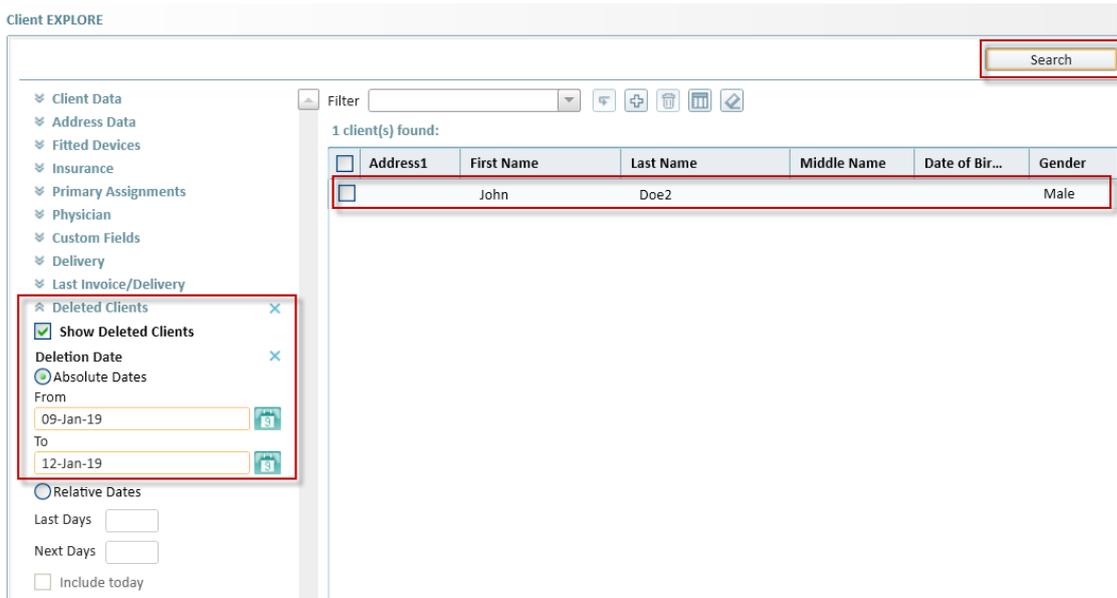
You can easily restore the deleted clients if needed. Simply select one or several clients and then click the **Restore** button.
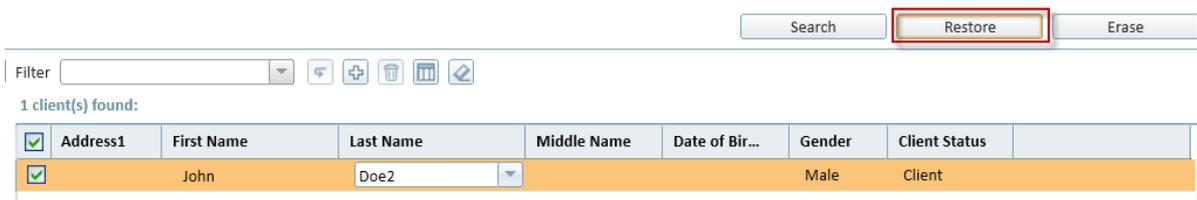

When requested by the client and to comply with the GDPR requirements, you might need to completely erase the customer from Strato. This action is not reversible. Select the clients to be erased (up to 10 for one erasure procedure) and click the **Erase** button.
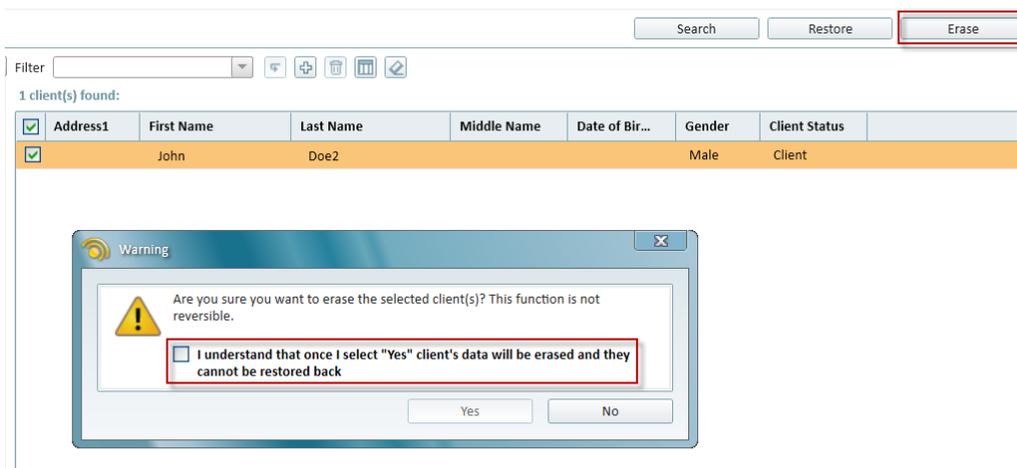
Confirm your decision by selecting the check box in the window and then click **Yes**.

The data that will be erased depends on the selections made under **Tools** > **Global Settings** > **Client Erasure**.
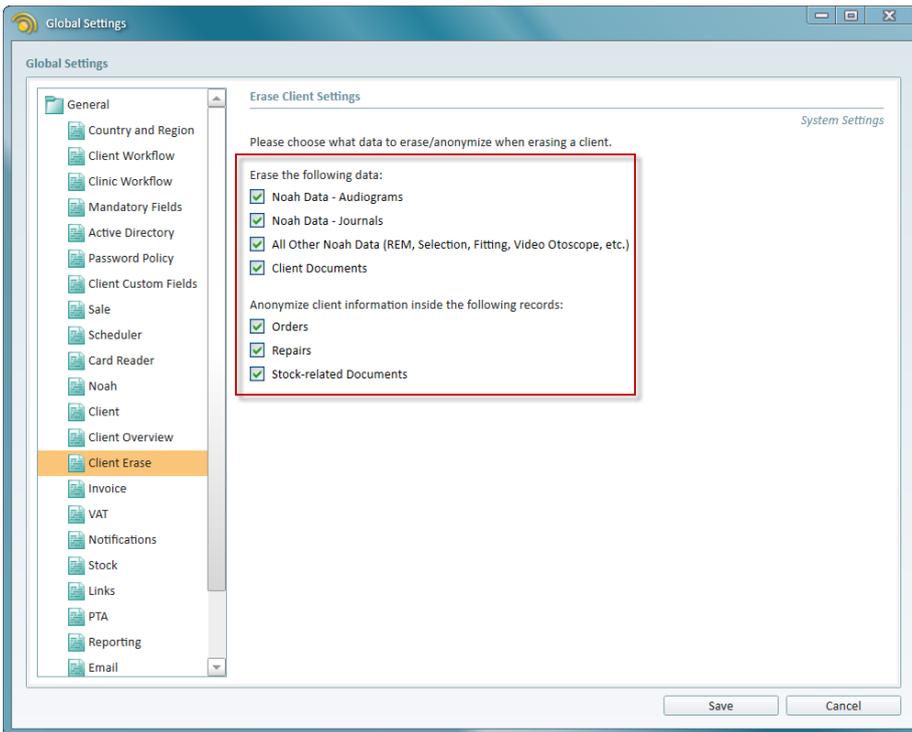
Here, you can choose what needs to be deleted or anonymized. Anonymized records are not deleted but no longer contain client personal data.

Client data relevant to the original purpose of processing will not be deleted. This means that client's sale documents or appointment records are still available in Strato.

We have also added the following permissions to manage the ability of a Strato user to delete clients, search for deleted clients and restore them. You can find these permissions by editing a role in Strato and then clicking **Client**.
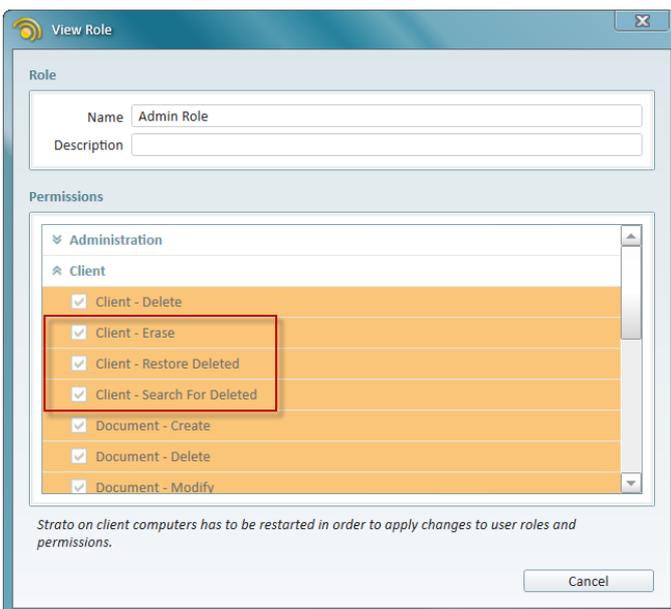
5 Additional Information

For further information, please contact stratosales@auditdata.com or visit www.auditdata.com.