



# Ollie! End User Guide

A member of the *Simple Accounting for Forms Experts™* family of software  
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Ollie (short for ‘On-Line Internet Extensions’) is an e-commerce program used in conjunction with our Simple Accounting for Forms Experts (SAFE) operations software.

## How It Works

Ollie is installed on a web server which has a network connection to SAFE. Thus, all activities performed by users in Ollie automatically update SAFE in real-time. This means that transactions are processed as quickly and efficiently as possible. You will need the following in order to use Ollie:

1. A web browser with Javascript and Cookies enabled that has access to the Ollie web site.
2. The Adobe Acrobat Reader program which is freely available from [www.adobe.com](http://www.adobe.com).

We also highly recommend that users have a basic understanding of their web browser and common browser terms, such as hyperlinks, submitting a form and so on. If you’ve used any on-line e-commerce program in the past (such as eBay or Amazon) then you know everything you need to know!

## Main Features

Ollie enables users of any Java Script-based web browser to perform the following main tasks:

1. Enter releases of items from your organization’s inventory or other sources.
2. Enter new orders to re-stock your warehouse
3. Enter orders for personalized products, such as business cards or letterhead, using any Adobe Acrobat™ document as a template.
4. Run various reports to monitor and manage your stock
5. Communicate with users within your company, as well as your distributor via web-based e-mail.
6. Track your orders via common carriers such as UPS, FedEx and DHL.
7. Seamlessly link to other e-commerce sites as provided by your administrator.

Additionally, Ollie is highly customizable for your company.

## Who Will Use Ollie?

There are five types of people who will use Ollie:

**Users:** These are the people who will place orders and releases. Users can each have privileges as to what they can specifically order or release.

**Approvers:** These are the next level up the chain. An Approver can do everything a user can do, but they are also responsible for approving orders placed by users which are subject to various constraints (for example, orders above a certain dollar amount or for certain products.) If an order requires approval, the Approver must OK it, before it will be acted upon by your Distributor. Approvals may be multi-layered. If your company sometimes requires certain orders to be approved by more than one person, an Approver can be set up for ‘Approving the

Approver’, again based on various order constraints.

**Administrators:** Actually there are three types of Administrators in Ollie (although one person can perform the tasks of the first two types.)

The **User Administrator** (UA) is responsible for answering questions from users regarding their orders. The UA’s e-mail and profile are visible to all users. The UA can be set to receive an e-mail CC of all activity in Ollie in order to audit the system.

The **System Administrator** (SA) is responsible for setting various company wide options, including the overall look and feel of Ollie. Some options include:

- System Language (currently American English, British English and Mexican Spanish are available with more coming!)
- Color schemes
- Logos
- Imprinted Order Templates

The **Distributor Administrator** (DA) is, of course the provider of your orders and is running SAFE software to provide fulfillment. This person has responsibility for setting up various system options which relate to the proper functioning of the web site. This person can also be set to receive a CC of every ordering activity in Ollie, again for auditing purposes. They are the person to whom users will be referred when they have questions regarding their orders not handled by the UA or SA.

## **Who Should Read This Document?**

This document is for everyone who will use and/or manage Ollie. It contains terminology that is shared by everyone using or administering Ollie so it is suggested that you begin your reading here.

### ***Is Brevity Truly The Soul Of Wit?***

Gosh we hope so. We’ve kept this document as short as possible for two reasons:

- We’re confident that Ollie is not only easy to use, but also, to a large extent, self-explanatory. In other words, if your Users have at least a passing familiarity with the Internet and on-line ordering, they should have no problem using Ollie—often with no training whatever.
- The ‘meat’ of setup is done by the DA. When properly configured, there really isn’t that much for Users to do but ‘get in, place their orders and get out!’ As it should be! So the bulk of Ollie verbiage is in the documents meant for Administrators.

That said, these few pages are chock full of stuff, because Ollie has lots of flexibility. So please do read them carefully.

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## Some Basics

### Terminology

We're going to use certain words over and over again, so we may as well begin by telling you what we mean when we say:

**User ID:** Every User has a Profile which consists of a unique User ID, some biographical information including e-mail address and a password. User IDs are assigned by either the SA or the DA. A User may change their own Password, but they may not set up their own User ID.

**Site:** A Site is simply a place where items may be shipped from or to. When you place orders or releases you must specify a Site.

**Note:** that this has nothing to do with the term 'web site'.

**Cost Center:** A cost center is simply a code which identifies a group of orders---usually for the purposes of determining 'who is using how much'. In many organizations a Cost Center is the same thing as a Site---in other words, there is one Cost Center for every Site that is shipped to. However, a Cost Center does not have to have anything to do with a particular place. For example, if your company is organized into various functional groups (sales, purchasing, marketing, etc.) Each of those functions may be considered Cost Centers.

When you start Ollie you must select a Cost Center to work in. To make this more automatic, you can set a default in your User Profile. When you are working in Ollie, every transaction you are working on will be keyed to that particular Cost Center. If necessary, you can switch between Cost Centers whenever you like in order to place orders across multiple Cost Centers.

**Product IDs:** Every item you order or release is referred to as a Product and has a Product ID. Where applicable, you will also see a **Form Number**, which is your company's reference for various Products.

**Session Timeout:** OK, so this is *two* terms. But they pretty much go together in this regard: you only have so much time to do *nothing* when using any e-commerce application! A **Session** is defined as beginning with your log in and ending when you log out or close your browser. A **Timeout** is a time limit, set by your SA in order to keep the system from being overloaded with users. So long as you are doing something, *anything* in Ollie, your session will remain active. However, if you simply leave your browser open and walk away, eventually your session will timeout, which is to say, end. If your session times out, you will be required to log back in and you may well lose important work. So the rule of thumb when using Ollie (or any e-commerce application) is, 'get in and get out!', which is to say, log in, complete your work and log out.

**Note:** The default Session Timeout in Ollie is one hour. So, after one hour of inactivity, your session will automatically be ended.

**Shopping Cart:** The Shopping Cart is, as you may have surmised, a 'basket' where all the Products you have entered for ordering or release are queued. A couple important points regarding the Shopping Cart:

1. Products you have put in your Shopping Cart remain there until you submit them. You can exit Ollie and come back to your Shopping Cart the next day and your Products will still be there. However, there is a timeout that can be set by your SA so that unattended items will be removed after a certain period of inactivity.
2. You are allowed only one Shopping Cart at a time for a given Cost Center. This is important! As the above implies, a Shopping Cart may consist of multiple types of transactions, for example an Imprinted Order and several Products for Release.

When you submit your Shopping Cart, all items in the Cart are processed by your DA as a single transaction and with a single purchase order. If you have some items that need to be on a separate purchase order, then you should break them into separate transactions. Once you submit your order it may be immediately processed or it may require approval. If it requires approval, you will be able to view the order, but you will no longer be able to edit it. You may have multiple unapproved orders so there is no need to wait for approval before adding other orders that need to be entered.

3. If an order requires approval it may be for several reasons. Perhaps there is one item that is above your allowed dollar limit. As we just discussed, your order cannot be processed until all items are approved, so if there are items you *need* to get processed immediately, it's best to not include other items which will require approval in the same Shopping Cart.
4. The Approver for your Shopping Cart may be fixed or he/she may vary depending on Cost Center. This is determined by your SA when first configuring Ollie for your company. If your company does approve by Cost Center, then each Cost Center has an Approver assigned by the SA and this person will be responsible for approving orders for all users who use that Cost Center.

**Shopping Lists:** A Shopping List is a list of the items placed on a particular order. When a User completes their order they are given the option to save that order as a Shopping List which can then be recalled (as we'll discuss later in the section on placing orders.) Shopping Lists can be reviewed or deleted from each User's Profile.

**Transactions:** This a generic term for all types of order entry you will enter into Ollie. These include three basic types and are entered using the first three menu choices at the top of your screen:

- **Releases:** These are Products that are readily available to be shipped directly to you. They either are being pulled from your existing inventory or from a warehouse.
- **Stocking Orders:** These are orders to replenish your inventory. They are typically shipped to your warehouse. The Products you are allowed to order here may be quite different than those you are allowed to release. For example, you SA may be allow you to release 30 different Products, but only order the three which are key for your job function.
- **Imprint Orders:** These include templated items such as business cards and

letterhead, but they can also include any personalized item including training manuals, signs or even wearable items. You can preview their final appearance in Adobe Acrobat Reader™.

**User Manager:** This is a page accessible from the Main Menu. It contains a Browse Box of Users. This page is only visible if you are an Approver, in which you will see all Users for which you are the Approver, or the System Administrator, in which you will see all Users in your company.

The User Manager is the place Approvers go to approve orders. It is also the place where administrators may edit each User's Profile as well as various elements which are linked to that profile. These include:

- Cost Centers
- Products
- Reports
- Shopping Lists

## Common Screen Elements

Ollie has a very consistent user interface. Here are some basic elements you'll interact with in almost every screen:

**Browse Box:** This is a list of things, such as the items in your Shopping Cart, or the Products you see in the Products menu. There are two key items on every browse: Sorters and Links.

- At the top of most browse boxes, there are column headings which you can click on to re-sort the contents. We call these special headings **Sorters**. Click once to sort in ascending order and again to sort in descending order. This is very handy for finding things in a browse with many pages of items!

**Example:** If you wanted to find the very last thing you ordered in Ollie, you could go to the Order History menu and click on the Order Date header twice to display your history with the most recent orders at the top.

- Also, on almost every browse box, there will be one or more cells in each row that you can click on to perform a related task. These are called **Links**.

**Example:** In the Products menu, if there is a thumbnail image of a particular Product you can click on it to open a larger Image View Window.

**Example:** In the Imprint Order menu, you can click on the Adobe PDF™ logo to view a PDF of your filled in templated item exactly as it will appear when it is manufactured.

**Example:** In the Order History menu, you can click on the order's Transaction ID cell to open a separate window showing the entire original order in detail.

At the bottom of almost every browse there will also be the following:

- **Record Counter:** which shows the number of items in the browse.

- **Page Selector:** If there are more items than can be displayed in a single page, this will show you how many pages there are in total as well as provide links to move forward or backward through this list.

**Main Menu:** Always at the top of the screen, the Main Menu consists of all the main functions you will use.

**Search Form:** At the top of many Browse Boxes there is a Search Form which is linked to the Browse Box. This is used to narrow the number of items displayed in the browse.

**Example:** In the Products menu, you may have dozens of Products. If you only want to view your company's envelopes, you can simply type the word 'ENVELOPE' into the DESCRIPTION field and press the *Search* button. The browse re-displays with only those Products which have the word 'ENVELOPE' somewhere in their description.

**Handy Tip:** Note that the search works anywhere within a field, so in the above example, all of the following Products would be displayed:

43-009 ENVELOPE #9 WINDOW  
78-099 PERSONAL LETTERHEAD ENVELOPE  
12-333 LARGE ENVELOPE--MANILA

At any time you can click the *Reset* button to restore the complete list in the browse.

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## Starting Ollie

You begin using Ollie by typing the URL you have been given by your [DA](#).

### Logging In

You will then be asked for a User ID and Password, both which will be supplied by your [SA](#).

**Note:** Enter your password carefully! If your SA has enabled password security, you may be locked out of the system after more than three failed attempts.

**Double Note: Your Password is cAse SENSItIvE!** Most of typing in Ollie is not case sensitive. However, your password most definitely *is*! Always check your CapsLock key before logging in.

### Log In Messages

You are now at the main screen. At the top is your Main Menu, which consists of all the main functions you will use, plus your name and your Default Cost Center.

In the middle of the screen, you may see one or more Log In Messages in a browse box. These are notes created by Users or Administrators that all users will see upon logging in. Every Log In Message has an Expiration Date after which they will automatically fall off the list. Click on any row to view a message's contents in detail.

**Note:** Any user may create a Log In Message, however these messages will not be immediately available until approved by your SA.

### The All Important Cost Center!

If your company uses Cost Centers, your last step before actually *doing* something in Ollie should be to select a Cost Center from the top right of the Main Menu. (To save time, most of you will have a Default Cost Center set up in Your Profile, so a Cost Center may already be pre-selected.) While selecting a Cost Center before beginning is not *strictly* necessarily, most pages will not function until you do so.

**Important!** If your company uses many Cost Centers, you should get in the habit of checking the Cost Center each time you log in.

### *I'd Like To Do This On Behalf Of My Esteemed Colleagues*

In many companies, there is one person whose job it is to order 'on behalf' of others. If you have the <ahem> great *honor* of having this distinction than you can click on the User Name at the top left of the Main Menu. When you do so, you will be able to select from a list of Users who you can order On Behalf Of (OBO). From that point on, as far as Ollie is concerned you *are* that User; all your privileges and settings are those of the OBO User.

A User with OBO enabled is allowed to order on behalf of everyone at the selected Cost Center.

**Reminder:** Even if your company doesn't use Cost Centers, there *is* a Default Cost Center in Ollie so in this case, an OBO User would be able to order on behalf of everyone in your organization.

**FYI #1** Even though you are ordering *on behalf of* others, please be aware that Ollie actually does keep track of who *really* entered the order! So if you accidentally order \$15,000 instead of \$150 worth of paper on behalf of your boss, there will be a knock on *your* door; not that of your boss!

**FYI #2** Even though you are ordering *on behalf of* others, you cannot approve orders, even if that user is authorized to do so. In other words, you can order on behalf of another User, but you cannot *Approve* on behalf of another Approver.

You can even switch between Users within the same Shopping Cart! This means that you can, for example, order letterhead for everyone in the office on a single purchase order by switching User Name at the Main Menu after entering each line item in your Imprint Order.

**Careful!** The User is assigned when you first enter the line item. If you switch to another User, then return to a previously entered line item, the User ID is *not* changed to the currently selected User Name! If you accidentally assigned an Imprint Order Line Item to the wrong User you must re-enter that line item!

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## The Ordering Process

As discussed before, there are three types of transactions in Ollie. We refer to these generically as ‘orders’.

### RELEASES

A list of Products you are allowed to release appear in a browse box. To select an item for release, simply type in the quantity you wish in the appropriate cell. If you need to move between pages, press the *Update* button to save your entries, but stay in your Release.

When you have completed entering quantities, press the *Submit* button to move these items into your Shopping Cart.

### *A Word About Shopping Lists*

On the Search Form for both Release and Restock Orders you may be able to select from various **Shopping Lists**, a special type of search consisting of a list of items which are often ordered together. There are two kinds of Shopping Lists:

**Personal:** Those you can automatically save in your Shopping Cart

**Global:** Those pres-set for you by your SA.

In either case, selecting a Shopping List automatically does two things:

1. Narrows the browse to the items in the Shopping List
2. Automatically fills in the Order Quantities (if any) from the Shopping List.

As we just hinted at, when you submit each order, you can save these items as a Personal Shopping List. This can be very helpful if you find yourself ordering or releasing the same items over and over.

The contents of each User’s Shopping Lists may be reviewed or deleted from the User’s Profile.

### STOCKING ORDERS

This is very similar to a Release. Again, a list of Products appears, but these are Products you are allowed to have manufactured and put into stock. To select an item, again simply type in the quantity you wish in the appropriate cell. If you need to move between pages, press the *Update* button to save your entries, but stay in your Stocking Order.

As with Releases, you can select from either Personal or Global Shopping Lists to make ordering faster.

When you have completed entering quantities, press the *Submit* button to move these items into your Shopping Cart.

### IMPRINT ORDERS

These are a bit different. In this case, you begin by pressing the *Add* button to create your first item to order. A form appears to fill out with your quantity to order and imprinting fields. These fields will differ depending upon the type of item you are ordering. When you have completed filling out the form, press *Update* to return to the Imprint Order Browse.

Repeat the above steps if you need to order multiple items, then press the *Submit* button to move to the Shopping Cart.

### ***A Few Words About Templates***

Imprint Orders are very different from other types of Products you will order. So it's important to recognize the following

- The entry form for Imprint Items may vary greatly depending on the type of Product you are ordering. For example, a business card may require many different fields, whereas a personalized envelope only a few. The template for each Product is set up by your [SA](#) according to your organization's needs. Options for the entry form are discussed in the Ollie Administrator's Guide.
- In **Your Profile** you can enable the **Auto-populate** feature for Imprint Orders. If Auto-Populate is enabled, form fields will automatically be filled in for you with information from Your Profile.
- If your [SA](#) has enabled this option, you may also be able to select addresses from a **Select Shipping Address Link** at the bottom of the page. This can save a lot of time when you have several business cards to enter.
- Because each Imprint item is highly personalized, you cannot use Shopping Lists with Imprint Products. However, you *can* use the Item History button at the bottom of the entry form to open a list of previous Imprint Orders of the selected Product in a separate window. From here you can select an item and have the form automatically filled in from there.

### **More On The Shopping Cart**

So you have your items in the Shopping Cart. Great. OK, completing your order there are three quick steps to submitting your order once and for all for processing

1. Review the order. Do the line items look correct? If not, click on them to either edit or remove them.
2. Fill out the shipping information. This includes, the date you need the order shipped, your company's purchase order number and the Site to which it will be shipped.

#### **Saving Shopping Lists**

If your SA has this feature enabled, you can save this order as a **Shopping List**. A Shopping List makes it easy to re-create this entire order in a few clicks as discussed in the section on *The Ordering Process*.

3. Press the *Submit* button. A confirmation message appears indicating whether or not approval is required. If your system is so configured, you will receive an e-mail showing the items you have just ordered. If your order requires approval, your Approver will also receive a similar e-mail with a link to the User Manager so he/she can approve your order.

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## The Approval Process

If you are an approver, you will receive an e-mail every time a User has placed an order which requires approval. When this happens, you can simply click on the link in the e-mail to go to the User Manager screen and begin the approval process, or you can open Ollie and go there manually. After that, the procedure is exactly the same. Let's assume you're doing this manually:

1. Open Ollie and log in.
2. Select the Cost Center.
3. Open the User Manager.
4. Locate the User in question. There will be an exclamation mark graphic in their row. Click on that to review their order(s) awaiting approval.
5. Click the Approve button next to each order *or* click the e-mail column to send the user a question regarding the order. If your SA has enabled it, you can also click on the Order ID cell to edit or cancel the order.

Once the order is approved (or cancelled), an e-mail is sent back to the original User notifying them of the change in order status and the order is updated in the DA's office to notify them that fulfillment can now begin.

6. If the order requires another layer of approval, after *you* approve the order, an e-mail is sent to the next level Approver for their final OK. In this case, once you approve the order, you can no longer edit it.

You would repeat this process for all unapproved orders.

**Important To Remember:** You cannot approve individual items on a given order.

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## Order History And Tracking

All your order history is available for review at any time in the **Item History** menu via a browse. The Search Form at the top makes it easy to find a specific order (or group of orders.) You can use this to view only order history at the currently selected Cost Center or at all Cost Centers to which you have access.

Here are some important columns in the browse:

### **ORDER STATUS**

This tells you where the item is in the ordering process.

**!Click Here!** If the item has been ordered or shipped you can click on this cell to put the item in your Shopping Cart as part of your current order.

C	Shopping Cart	The item is in your Shopping Cart, but not yet submitted for processing.
W	Waiting	The item has been submitted for processing, but is awaiting approval by the Approver displayed at right. submitted for processing.
O	Ordered	Your order has been placed and is awaiting fulfillment
S	Shipped	Your order has been shipped

### **ITEM TYPE**

This cell tells you in which menu you ordered the item.

T	Template/Imprint Item
R	Release
O	Stocking Order

### **P.O. NUMBER**

Your organization's purchase order.

**!Click Here!** To review the entire contents of this order.

### **PRODUCT ID**

Our identifier of the item you ordered.

**!Click Here!** To view details about this item, including a large image.

**SHIP DATE**

If the item has shipped, this cell shows you the date we shipped it. If not, it displays the date you requested as the Needed By when you ordered. In this case, the date is colored **red**.

**!Click Here!** To open another window and view item tracking via UPS, FedEx or DHL.

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## Reporting

Ollie contains a number of useful reports which allow you to review your order history or, if you are an Approver or Administrator, help you manage your organization.

### General Information

Begin by selecting a report from the browse box. This will generate the first page of your report.

**Note:** Each User's list of available reports is determined by the [SA](#).

The report you see can be used as is, or it can be a starting point for further refinement. In general, this is because reporting works very much like the browse boxes you see in other areas of Ollie. There is a Search Form at the top, in order to select a range of records, and Sorters at the top of various columns to arrange the order of presentation. Using these tools you can obtain a great deal of control over the presentation of your report.

### Printable Version

There is also a Printable Version button at the top right of the screen. This opens another window containing the same report, but with a few notable differences that make for a, well, more 'printable' version.

- **No Search Form**
- **Page breaks** (you won't see these on screen, but your printer will.)
- **Organization Header** (optional) A heading containing your organization's name, your name and the print date and time.

### *A Note About Groupings*

Your report may also contain various groups, each with a subtotal. If so, it's important to recognize that these usually require a given sort in order to function properly. For example, you may have an Order History report with a grouping by Product ID. If so, this report will only total correctly if the selected sort *is* by Product ID. In other words, if you sort the report by another column such as Category, then you will likely get very odd totals!

That said, selecting an 'incorrect' sort can be *very* useful. In the above example, while actually *printing* the report may not be appropriate, the fact that you can *see* the history grouped in other ways, may actually be quite helpful.

## Standard Reports

It's a *bit* difficult to discuss specific reports in Ollie because these can vary quite a bit depending on which available reports your SA has allowed you access. Also, Ollie reports are often customized for each organization. However, here are some standard reports that you are likely to have on your screen. Please contact your SA to find out if there are others available.

MODULE	NAME	DISCUSSION
OLUML	User Master List  A list which includes name, address and User ID	<p>If you are an <b>Approver</b> you will be able to run a list of all Users at either the current Cost Center or for all your Cost Centers.</p> <p>If you are a <b>User</b>, you will be able to run a list of all Users for which you are allowed to Order On Behalf Of.</p>
OLPML	Product Master List	<p>If you are an <b>Approver</b> you will be able to run a list of all Products linked to all Users for all your Cost Centers.</p> <p>If you are a <b>User</b>, you will be able to run a list of your Products, either at your current Cost Center, or for all your Cost Centers.</p>
OLSDL	Sales Order Detail	<p>A basic Sales History Report showing the line item detail (the Product, type of order line item, quantity ordered, etc.)</p> <p>If you are an <b>Approver</b> you will be able to run a list of all Orders for all Users for all your Cost Centers.</p> <p>If you are a <b>User</b>, you will be able to run a list of your orders history, either at your current Cost Center, or for all your Cost Centers.</p>
OLCCS	Cost Center Summary	<p>Similar to the Sales History Report, but grouped by Cost Center.</p>
OLAPL	Cost Center Approver Tree	<p>Approvers Only! A list of each Approver and their Cost Centers. If your company requires multi-leveled approvals, this helps you keep track of 'who approves the approvers!'</p>
OLUUA	Usage Analysis	<p>Shows month by month Usage for each Product you have ordered.</p> <p>If you are an <b>Approver</b> you will be able to run a list of all Orders for all Users for all your Cost Centers.</p> <p>If you are a <b>User</b>, you will be able to run a list of your orders history, either at your current Cost Center, or for all your Cost</p>

OLISL	Inventory Status List	<p>Centers.</p> <p>Similar to the Product Master List</p> <p>This report gives specifics on Quantities On Hand, Quantity On Order and suggests items to be reordered.</p> <p>If you are an <b>Approver</b> you will be able to run a list of all Products linked to all Users for all your Cost Centers.</p> <p>If you are a <b>User</b>, you will be able to run a list of the Products you are allowed to order, either at your current Cost Center, or for all your Cost Centers.</p>
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**Just To Reiterate:** Each report may be enabled or disabled *by User ID* by your SA, so some of these reports may not be available to you.

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## Other Features

### Your Profile

In this menu you tell Ollie important features about you, including your name, address and e-mail address, default Cost Center and a password for logging in. Depending on your organization, some of these fields may be disabled from editing by your SA.

Here are some important fields in this form:

Shopping Lists	Inside Your Profile you can also review and edit your previously saved Shopping Lists for Release and Stock Order Products. <b>Note:</b> You may not edit Shopping Lists which are pre-defined by your SA.
Password	Your SA may have several types of security enabled which affect your password. These restrictions may include:  <b>Periodic Renewal:</b> You may be required to change your password every so often.  <b>Strength:</b> You may be required to use a password of a certain minimum length and which consists of a combination of characters <i>and</i> numbers. For example, your SA may require your password to be at least 8 characters and have at least 2 alpha characters and 2 numeric characters.  <b>Lockout After Failure:</b> If you enter an incorrect password more than 3 times, or take more than a given time period to log in you may be prevented from logging in at all. If this happens, you will need to contact your SA to issue you a new password and re-activate your account.

### Contact Us!

On this screen you can send us, or other users within your organization e-mails, including attachments, pertaining to the ordering process. You have the option of automatically sending a CC to your approver and to yourself.

### System Manager

This menu is only available to the [SA](#) and will be discussed in detail in a separate document. In addition to setting up various options for your organization, this is also the place where your

company will set up templates for Imprinted items. It also allows the SA to send broadcast e-mails to communicate with all Users.

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# Troubleshooting

If you have trouble using Ollie, please use the following procedure to correct the problem as quickly as possible. The good news is that, whatever it is, it's probably not your fault! 🍌

## Some General Guidelines

The following is most squarely aimed at the SA, but also applies to all Users as well. If you're having a problem the three most important words to remember are Document. Document. Document! We need to know:

- The date and time the problem occurred
- Your User ID
- The Cost Center
- If you were ordering OBO another User, their name.
- If there is a problem with a given order, the Product ID and Order Quantity
- If there was an error message, the exact and complete error message.
- Your blood type

OK, we're kidding about that last one (we just wanted to see if you were still awake). But it's too often the case that Users will report a 'problem' and not realize that we can't see what you were doing at the time (Big Brother may be watching you, but we're definitely *not*.) In most cases, you save a lot of time in getting any problem resolved by spending just a little to get us all the information we need up front.

## The Most Common Issues

You might call this the 'greatest hits' list of problems that most Users encounter. Check here first *before* calling someone. In fact, we recommend that you read through it a few times after you've used Ollie just a bit. We've found that it often fills in lots of gaps in people's understanding of Ollie by seeing what problems can be *avoided*.

### 1. I CAN'T CONNECT TO OLLIE

First, check that you've typed in the correct URL. I know you'd never make a typing error, but...

2. Now, check to see if you can connect to other sites. If so, contact your SA. If others in your organization can connect, but not you, then the problem is probably with your computer. If *no one* in your organization can connect, then it's a job for someone *much* higher up the food chain. 🍌

### 3. I CAN'T LOG IN

Have you been assigned a User ID and Password by your SA? There is no anonymous log in for Ollie.

OK, you have a User ID and Password. Not to be patronizing, but are you *sure* you typed both correctly? The User ID is not case sensitive. The Password *is case sensitive*.

4. **I LEFT MY COMPUTER AND NOW MY SHOPPING CART IS EMPTY!**  
You probably left your computer a good while ago. Remember: your session will time out after a certain period of inactivity. The default is one hour.
5. **BUT I *DIDN'T* LEAVE FOR *THAT* LONG!**  
We believe you. Perhaps you were working in another program. Remember: Your session will time out if you have no activity in your web browser past the time out period. This will happen even if you are using your computer for other tasks.
6. **BUT MY SHOPPING CART CONTAINED 200 ITEMS FOR THE LARGEST RELEASE IN MY COMPANY'S ENTIRE HISTORY!!!**  
Contact your SA (who will contact your DA). It is possible that the order is still retrievable since Ollie maintains an audit trail of cancelled orders.
7. **THE PRODUCT I NEED TO RE-ORDER ISN'T IN THE STOCK ORDER SCREEN, BUT I *DO* SEE IT IN THE RELEASE SCREEN**  
Check with your SA. Even though it is linked to you, you've not been allowed to order that particular Product.
8. **WHEN I PLACE AN IMPRINT ORDER, I CAN SEE MY EMPTY TEMPLATE, BUT WHEN I CLICK ON THE PDF PREVIEW BUTTON, I STILL GET AN ERROR 404.**  
Check with your SA. There is something wrong with the web server which is probably affecting all Ollie Users.
9. **WHEN I PLACE AN IMPRINT ORDER, I CAN'T SEE THE EMPTY TEMPLATE. WHEN I CLICK ON THE PDF PREVIEW BUTTON, I GET AN ERROR 404.**  
Check with your SA. The PDF Template for that Product is not properly loaded.
10. **TOM HERE. I'M AUTHORIZED TO ORDER OBO A NUMBER OF USERS. I ACCIDENTALLY ENTERED AN IMPRINT ORDER FOR 'DICK', WHEN IT WAS SUPPOSED TO BE FOR 'HARRY'. CAN I CHANGE IT?**  
Have you submitted the order? If not, you'll need to remove that it from your Shopping Cart, select the correct User from the Main Menu, then re-enter.

If you've already submitted the order and it awaits approval, you can still cancel the order and start over.

If you've already submitted the order and it didn't require approval, you should contact your SA immediately to see if the order can be cancelled by your DA before it is produced.

**11. TOM AGAIN. I'M THE GUY AUTHORIZED TO ORDER OBO A NUMBER OF USERS. I'M TRYING TO ENTER AN IMPRINT ORDER FOR 'DICK', BUT THE ONLY CHOICE IN THE LIST IS 'HARRY'. WHERE'S DICK?**

Did you change Cost Centers? It's likely that 'Dick' is not assigned to your currently selected Cost Center.

**12. HOLY COW! I SUBMITTED AN ORDER FOR APPROVAL AND WHEN I LOOK AT MY E-MAIL THE ITEMS ARE ALL IN THE WRONG COST CENTER!**

Again: Did you change Cost Centers? Remember, you're only allowed one Cost Center per Shopping Cart. If you change Cost Centers at any point before submitting your order, you're re-assigning all your items to that new Cost Center. Contact your SA. She should be able to re-assign the order to the proper Cost Center.

**13. I'M NOT GETTING CONFIRMING E-MAILS FOR ANY OF MY ORDERS**

Are you receiving an error when you submit orders? **If not**, first, check your User Profile. Is your e-mail address properly entered? If so, try going to the **Contact Us!** screen and send us a test message with a cc to yourself. If you don't receive it, check with your SA as there may be a problem with either your computer or your organization's e-mail system.

**If you do receive an error message**, again, check your User Profile. If there is no error in your e-mail address then contact your SA immediately with the complete error message.

**14. I ACCIDENTALLY SUBMITTED AN ORDER BEFORE I WAS READY. CAN I UNSUBMIT IT?**

Nope. However, if the order required approval you *can* go into your Order History screen and cancel it. Otherwise, you should contact your SA immediately to see if the order can be cancelled by your DA before it is produced.

**15. MY ORDERS AREN'T GETTING APPROVED BY MY APPROVER**

Have you contacted your Approver? Make certain that he/she is receiving confirming e-mails. If not, inform your SA. They can re-send those e-mails and investigate why confirming e-mails aren't being sent. An important bit to let them know: are *you* receiving e-mails?

**16. MY ORDERS ARE BEING MARKED FOR APPROVAL EVEN THOUGH THEY SHOULD JUST SAIL RIGHT THROUGH**

First of all, check in your User Profile to make certain your Order Limit is correct. If it is, then check your Products List and see what the maximum order limit is for that particular Product. Still not found the reason? Some products may be flagged to *always* require approval. If so, one line item may be holding up the entire order. Remember: You cannot approve individual line items on an order.

**17. MY ORDERS AREN'T GETTING APPROVED BY MY APPROVER**

Have you contacted your Approver? Make certain that he/she is receiving confirming e-mails. If not, inform your SA. They can re-send those e-mails and investigate why confirming e-mails aren't being sent. An important bit to let them know: are *you* receiving e-mails?

**18. MY ORDERS WEREN'T GETTING APPROVED BY MY APPROVER. I CALLED**

**HER AND SHE'S ON VACATION. I NEED THIS ORDER!**

Contact your SA. They can get the order Approved for you and re-assign your Approver whilst she is on vacation.

**19. I'M AN APPROVER AND I'M GOING ON VACATION HOW CAN I MAKE CERTAIN ORDERS CONTINUE TO GET APPROVED?**

Contact your SA. They can re-assign your Users to another Approver while you're working on your tan. When you return, they will need to re-assign your Users to you.

**20. I'M AN APPROVER AND I'M GETTING ORDERS TO APPROVE FROM USERS FOR WHOM I AM NOT THE APPROVER**

Contact your SA with these Users. They can re-assign them to the proper Approvers.

**21. I'M IN THE CONTACT US! SCREEN AND TRYING TO ATTACH A DOCUMENT TO A MESSAGE. EACH TIME I CLICK SUBMIT I GET AN ERROR MESSAGE.**

Contact your SA with the exact error message. There is likely a server configuration problem.

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## Frequently Asked Questions

**What software do I need to run Ollie on my own web server?**

- 1) Ollie
- 2) [SAFE!](#)
- 3) A Microsoft Windows Server and IIS.
- 4) A fixed IP connection to the internet, preferably with your own domain name.

**Can Users see each others orders?** Each user sees only his/her own orders. Only System Administrator may have access to all orders from that customer. An Approver will have access to all orders for a particular Cost Center.

**Can I order for multiple Cost Centers?** Sure. But not on the same order. After you finish an order, simply select a new Cost Center drop list and begin a new order.

**If I'm allowed to order on behalf of other Users, Can I switch between Users on the same Shopping Cart?** Absolutely! If, for example, you need to order business cards for ten people, simply click on the User Name at the top left of the Main Menu after adding each line item to assign the next business card to a new User.

**If I'm allowed to order on behalf of other Users, Can I also perform other functions on their behalf, such as view their histories or print their reports?** No. Think of Order On Behalf as a one way door. You can put information into the systems for another user, but you cannot get it back out. This is done to protect User's privacy. However, an Approver at a Cost Center *can* perform both of these functions for all Users in their Cost Center.

**Can Users see a preview of what they are ordering?** Yes! You may link a graphic to every product (both full-size and thumb-nail). Plus, on Imprinted Orders, users can view an Adobe Acrobat PDF® of their item which includes their merged data, including specs and imprinting on screen!

**What about other types of files? Can Users download or print documents?** You can also link products to many other types of files, such as Adobe Acrobat PDF® files. This allows users to view important documents and print them on demand.

**How many Users can run Ollie simultaneously?** By default, 50. If you need more than 50 simultaneous users, additional user licenses are available from Suntower Systems. Note, however, that the maximum number of simultaneous users also depends greatly on the performance of your web server.

**How is Ollie configured. Who decides which Users can do what?** Since Ollie is essentially a 'front-end' for SAFE, configuration of Users and Administrators is initially done for you by your Distributor Administrator. After that, Users may be added by your SA.

**What about security? Could someone break into our site?** Ollie may be installed on your Intranet and subject to all your in-house security requirements. Only Port 80 is used for data transmission and no applets are transferred to end-user desktops. If the Ollie server computer is to be kept separate from the SAFE server, a connection *is* necessary between these two machines, but again, this can be part of your Intranet and does not need to be exposed to any external Internet traffic.

Optionally, Ollie can use the *Secure Sockets Layer* (SSL) found on most Web servers. This is the encryption standard of the industry. It prevents unauthorized users from intercepting your data off the net. Your Processor can also implement data encryption to SAFE data files to

prevent users from copying Ollie or SAFE data to other computers.

**Can we customize the look and feel of our web site?** To a very large extent the answer is 'yes'! In order to keep Ollie economical, many features of Ollie are pre-configured to meet the needs of the widest variety of Users. However, many aspects of Ollie *are* modifiable to taste using standard HTML and style sheets. These include:

- Color schemes and fonts
- Logos and graphics
- All function icons
- Imprint Order Templates
- The language presented to users

Additionally, custom programming is available for more specialized needs.

**Can we prevent some users from accessing Ollie while still allowing them access to general information?** Absolutely! As described above, there are many tools your System Administrator can use to limit Users to only the functions they need. At the most basic level, each menu choice and report may be enabled or disabled by User ID. Further, each User may be configured to review only orders from their own Cost Center.

Additional limits on ordering may also be imposed, including:

- Product Category
- Order Quantity of a particular item
- Dollar amount per item
- Dollar amount per order
- Dollar amount per time period

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## How We Can Help

If you've been concerned about the complexities of e-commerce, don't worry! We can help get it all together for you in the following ways:

- We provide ongoing technical documentation and instruction over the internet, including multi-media tutorials for all major functions of Ollie and SAFE. Contact your Processor to obtain these..
- We can sell or lease you all the hardware you need. As [Authorized IBM Network Resellers](#), we have the expertise to get you installed and running the right way. We will pre-install and test Ollie so it's ready to run the moment we flip the switch. And we'll back our work with a three year warranty.
- We can provide the [Networking Solutions](#) you need to connect users in your office, remote offices, customers and salespeople on the road.
- We can set you up with an ISP if you wish to host Ollie remotely. We can pre-install Ollie on their server and take care of all the paperwork necessary to getting your WWW address.
- We can come to your site and provide [comprehensive training](#) on the use of Ollie for both your network administrator, office employees, and sales people in the field.