

» Pearson

OASIS

Generating Reports

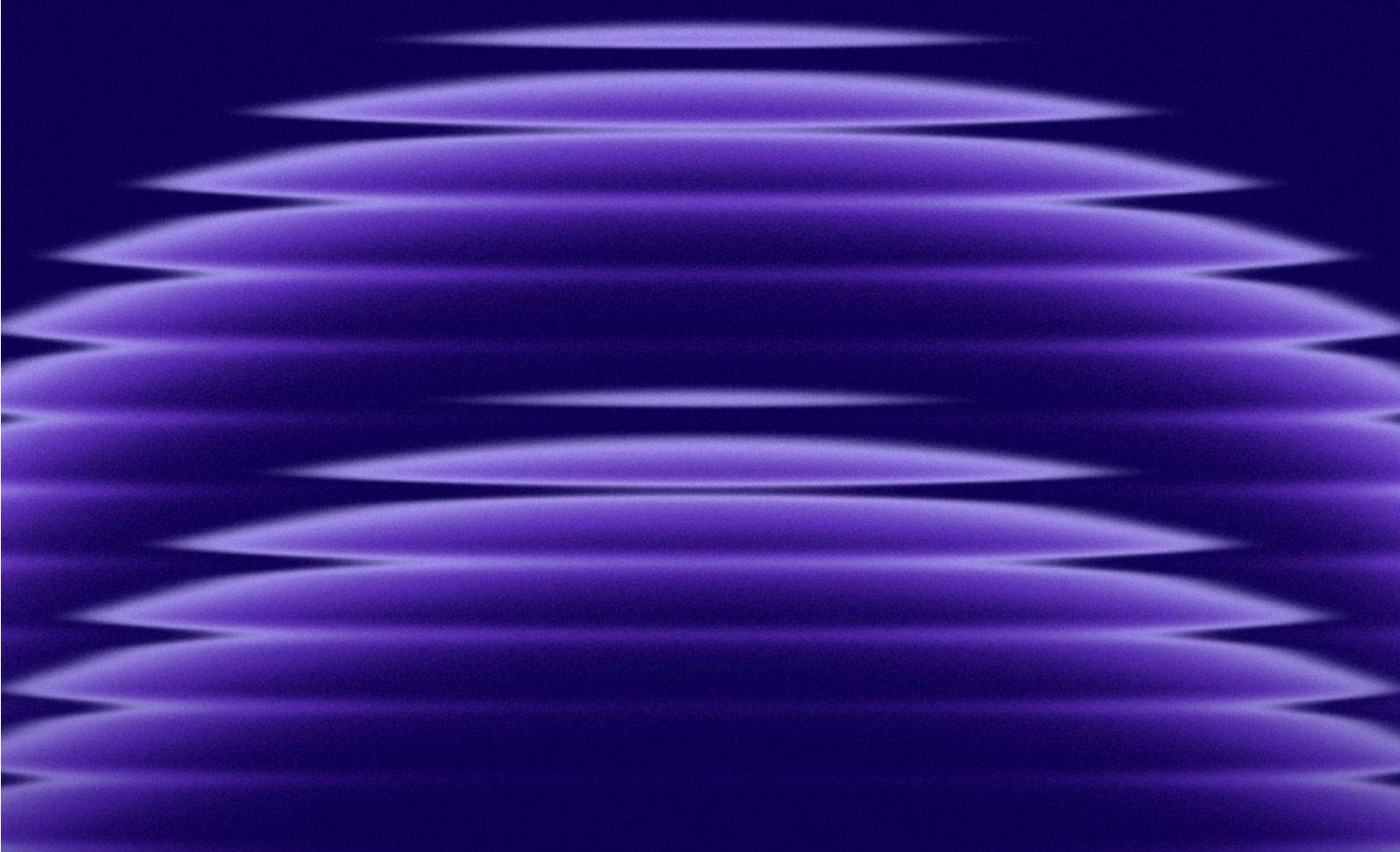


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Overview

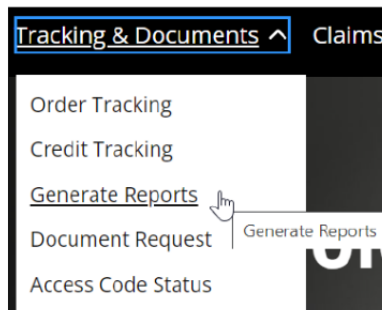
This OASIS (Order and Shipment Information System) Generating Reports User Guide documents how to run, save and delete reports. You can run reports for new editions and substitutions, out-of-print lists, unshipped orders, order status and invoices.

Please note the following about OASIS reports:

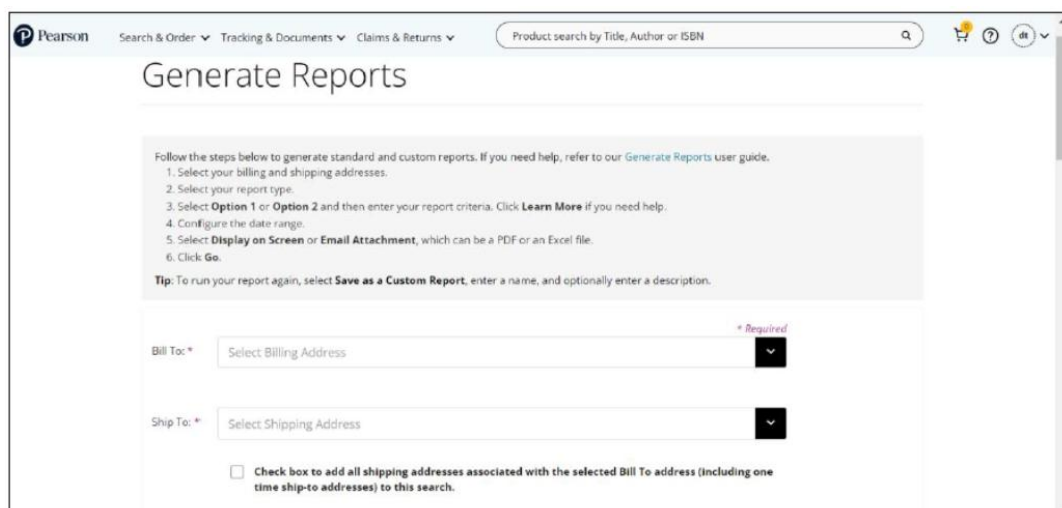
- New editions & substitutions, supplements, and out-of-print reports are based on your purchase history
- You can configure the coverage period up to 36 months for all reports
- Invoice reports provide an overview of all invoices or detailed invoice information

Generate reports and create custom reports

1. Click **Tracking & Documents**



2. Select **Generate Reports** from the dropdown menu



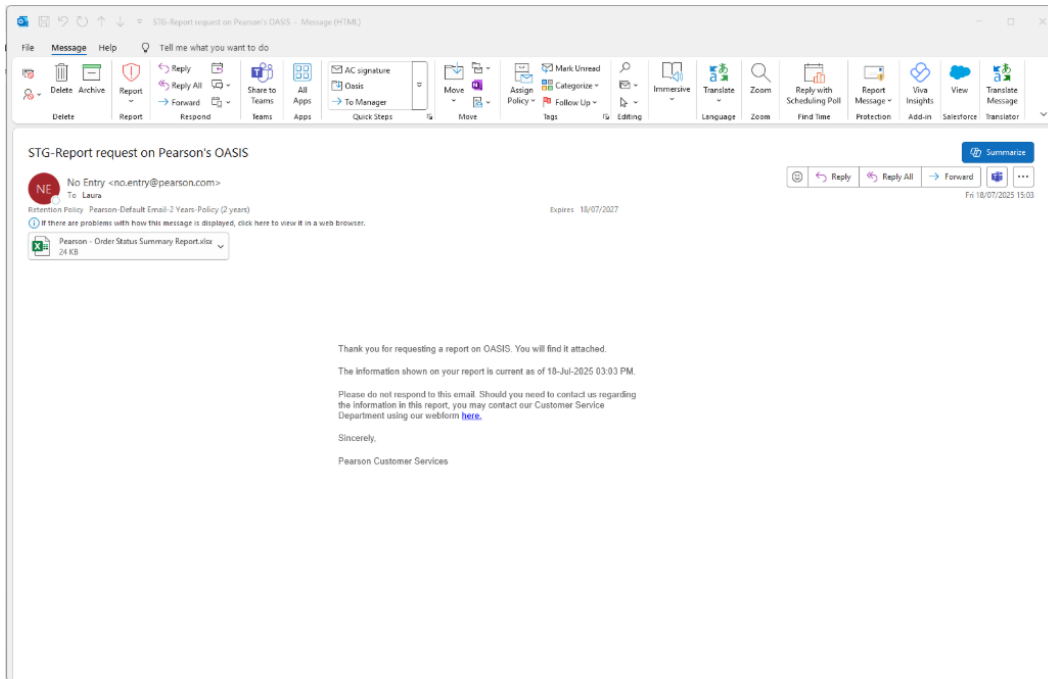
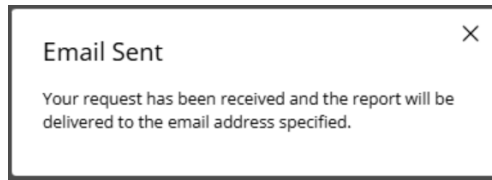
3. Select your **Bill To** and **Ship To** addresses from the dropdown
4. As an option, click the checkbox to add all shipping addresses associated with the selected **Bill To** address (which will include one time ship-to addresses) to your search
5. Under **Standard Reports** select one of the following. Once selected, a brief description of the report is displayed:
 - a. New Editions & Substitutions
 - b. Supplements Report
 - c. Out of Print Lists
 - d. Unshipped Orders Report
 - e. Order Status Report – Summary
 - f. Order Status Report – Detail
 - g. Order Status Report – Tracking
 - h. Invoice Report – Summary
 - i. Invoice Report – Detail
 - j. Credit Memo Report – Summary
 - k. Credit Memo Report – Detail
6. Under **Select Report Criteria** select **Option 1** for complex criteria or **Option 2** for simple criteria. Click **Learn more** for more information.
7. The values you can select and enter vary depending on the report type and the option you selected. See the table below for more information:

| Option Selection | Report Type | Value Options |
|------------------|---|--|
| Option 1 | All reports except for the credit memo reports. | Perform one or both of the following: •Select All ISBNs or enter one or more ISBNs •Select All Pos or enter one or more Pos (Purchase Orders) |
| | Credit memo reports only. | Perform one or both of the following: •Select All Chargeback / PO Numbers or enter one or more Chargeback or PO Numbers •Select All ISBNs or enter one or more ISBNs |
| Option 2 | All reports except for the credit memo reports. | Enter up to 50 Purchase Order numbers and ISBNs seperated by a / (for example: PO1234/9780134093413). Enter only one PO number and ISBN combination per line. |
| | Credit memo reports only. | Enter up to 50 chargeback or purchase order numbers and ISBNs seperated by a / (for example: PO1234/9780134093413). Enter only one chargeback or purchase order number and |

8. Under **Order Entry Date** choose **Select Date Range** and then select the date range from the dropdown or choose **Select from Calendar** and then configure the start and end dates.
9. Under **Delivery Method** select **Display on Screen** or select **Email attachment** and perform the following:
 - a. Select **Excel** or **PDF** from the **Type of File** dropdown
 - b. Enter your email address
10. If you want to run the same report in the future, select **Save as a custom report** and enter a name for the report. As an option you can also enter a description for the report. **Note:** See

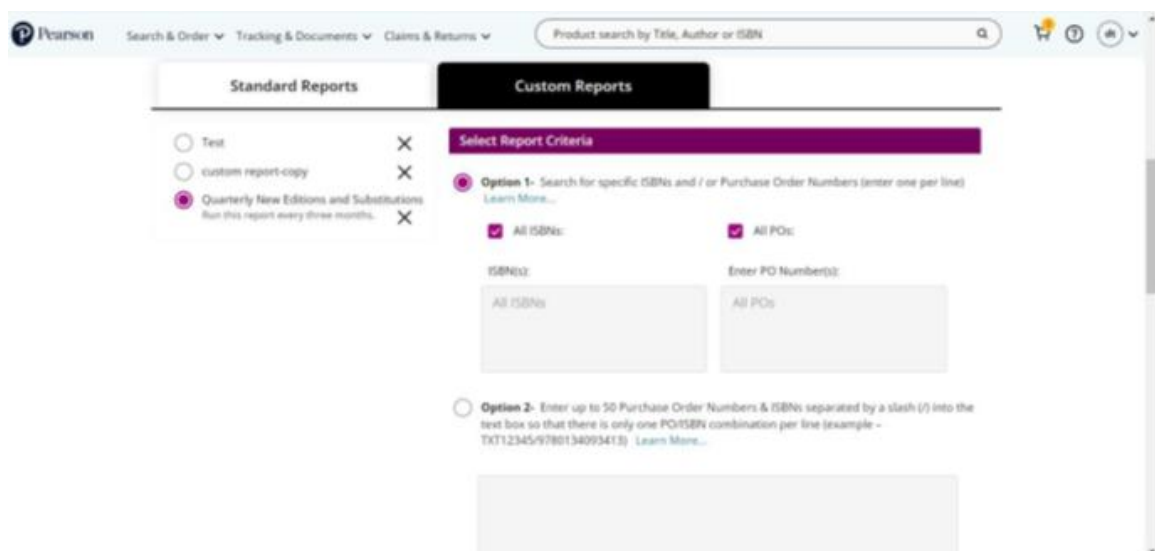
the below section 'Run a custom report or 'Delete a custom report' below, for more information.

11. Click **Go**. If you selected **Email attachment**, then the following will be displayed, and the report will be emailed to you.



Run a Custom Report

1. On the **Generate Reports** page, click the **Custom Reports** tab.



2. Select the custom report you want to run from the left-hand side
3. If needed, you can modify the report criteria
4. Under **Delivery method** select **Display on Screen** or select **Email attachment** and then perform the following:
 - a. Select **Excel** or **PDF** from the **Type of File** dropdown
 - b. Enter your email address
5. If you want to run the same report in the future, select **Save as a custom report** and enter a name for the report. As an option you can also enter a description for the report.
6. Click **Go**. If you selected **Display on Screen**, the report will be saved as a **PDF** on your computer. If you selected **Email**, the report will be emailed to you.

Delete a Custom Report

1. On the **Generate Report** page click the **Custom Reports** tab
2. Click the **X** next to the name of the report you would like to delete

The screenshot shows the 'Custom Reports' tab selected. A report named 'Test custom report' is highlighted with a red box, and a yellow 'X' icon is visible next to it. Below the report list, there are two options for search criteria: 'Option 1' (selected) and 'Option 2'. 'Option 1' includes checkboxes for 'All ISBNs' and 'All POs', and corresponding text input fields. 'Option 2' includes a text input field for entering PO/ISBN combinations. At the bottom, a confirmation dialog asks 'Are you sure you want to delete the selected report?' with 'Cancel' and 'OK' buttons.

3. Click **OK**