Generating Reports

Table of Contents

Overview

This OASIS (Order and Shipment Information System) Generating Reports User Guide documents how to run and save easily configurable reports, including reports for new editions and substitutions, supplements, out-of-print lists, unshipped orders, order statuses, and invoices,
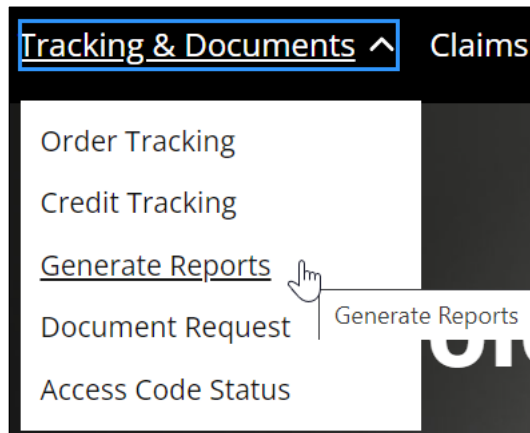
Please note the following about OASIS reports:

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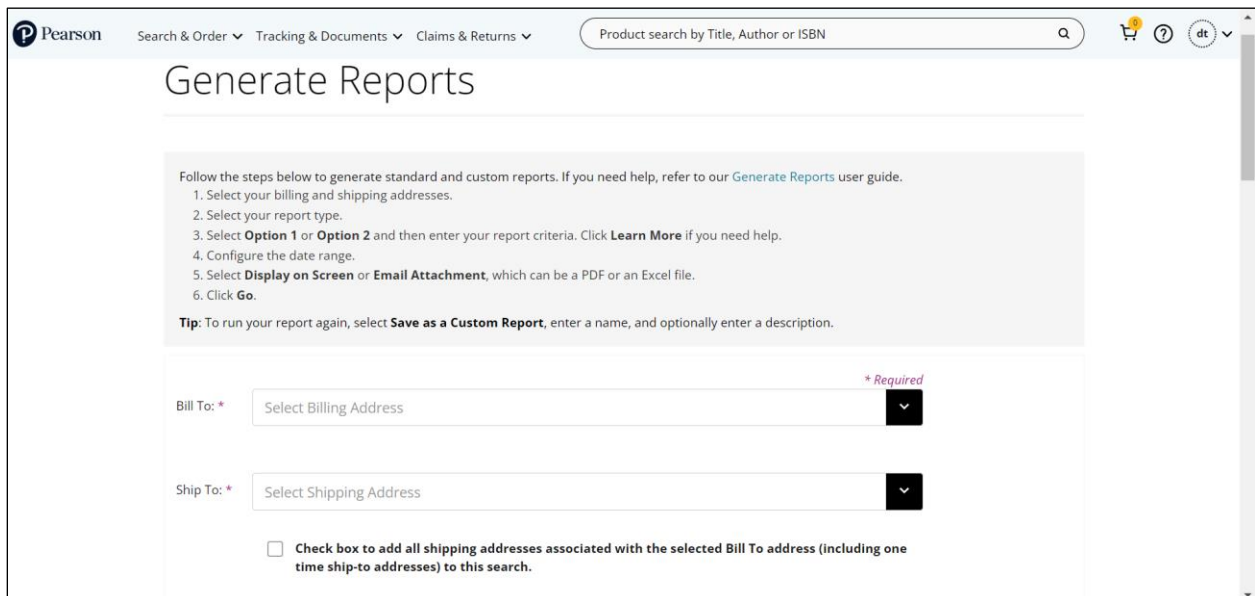- Invoice reports provide an overview of all invoices or detailed invoice information.

Generating Reports
Generate reports and create custom reports

1. Click **Tracking & Documents**.

2. Select **Generate Reports**.

3. Select your **Bill To** and **Ship To** addresses from the dropdowns.
4. As an option, click the checkbox to add all shipping addresses associated with the selected Bill To address (including 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 below.
   - New Editions & Substitutions
   - Supplements Report

Generating Reports

- Out of Print Lists
- Unshipped Orders Report
- Order Status Report – Summary
- Order Status Report – Detail
- Order Status Report – Tracking
- Invoice Report – Summary
- Invoice Report – Detail
- Credit Memo Report – Summary
- 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.

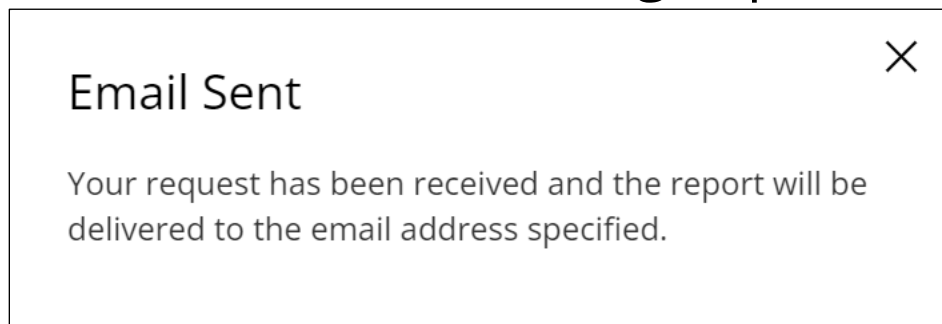| Option Selection	Report Type	Value Options
Option 1	All reports except for the credit memo reports.	Perform one or both of the following: • Select **All ISBNs** or enter one or more ISBNs. • Select **All POs** or enter one or more POs (purchase orders).
	Credit memo reports only.	Perform one or both 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.

Generating Reports

Option Selection	Report Type	Value Options
Option 2	All reports except for the credit memo reports.	Enter up to 50 Purchase Order numbers and ISBNs separated by a slash (for example, TXT12345/9780134093413). Enter only one PO and ISBN combination per line.
	Credit memo reports only.	Enter up to 50 chargeback or Purchase Order numbers and ISBNs separated by a slash (for example, TXT12345/9780134093413). Enter only one chargeback or PO and ISBN combination per line.

8. Under **Order Entry Date** select **Select Date Range** and then select the date range from the dropdown or select **Select From Calendar** and then configure the start and end dates.
9. 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.
10. If you want to run the same report in the future, select **Save as Custom Report** and enter a name for the report. As an option you can also enter a description for the report.
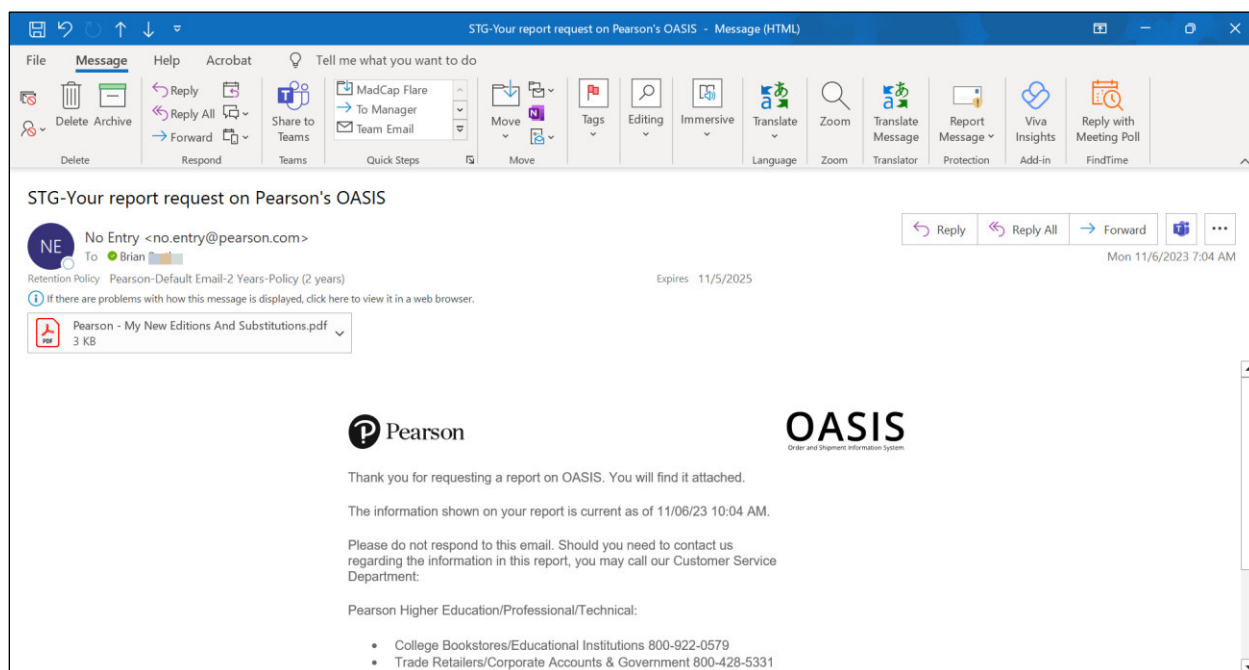
Note: See Run a custom report and Delete a custom report for more information.

11. Click **Go**. If you selected **Display on Screen,** then the report will be saved as a PDF on your computer. If you selected **Email Attachment,** then the following will be displayed.
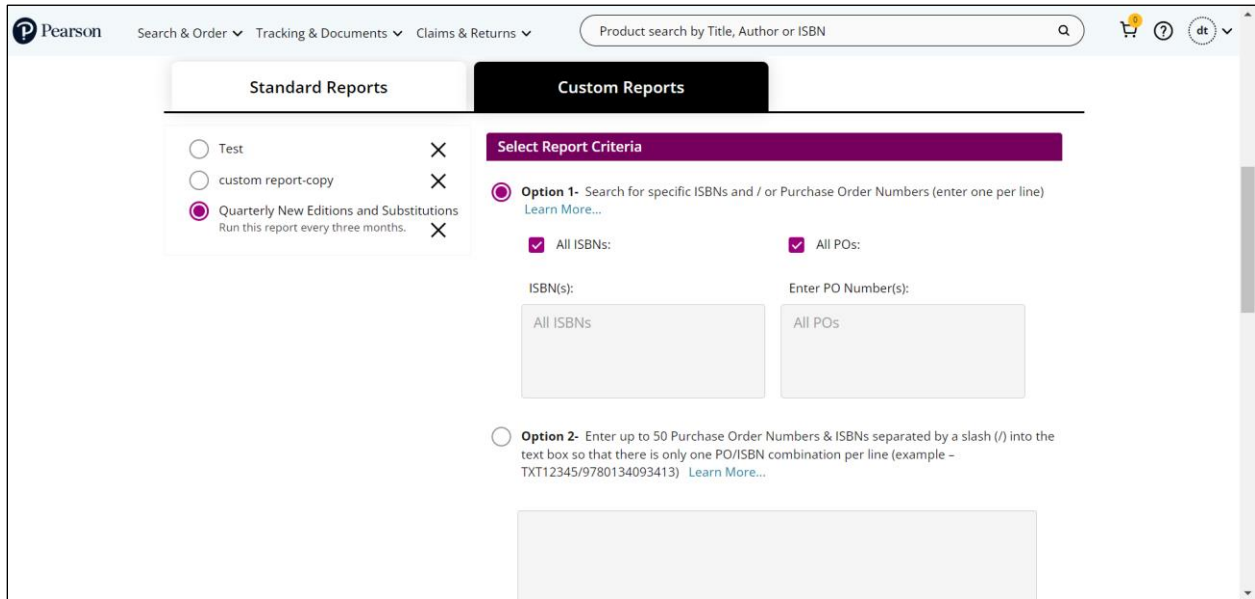
Generating Reports

And if you selected email delivery you will receive an email with an attachment.

Generating Reports

Run a custom report

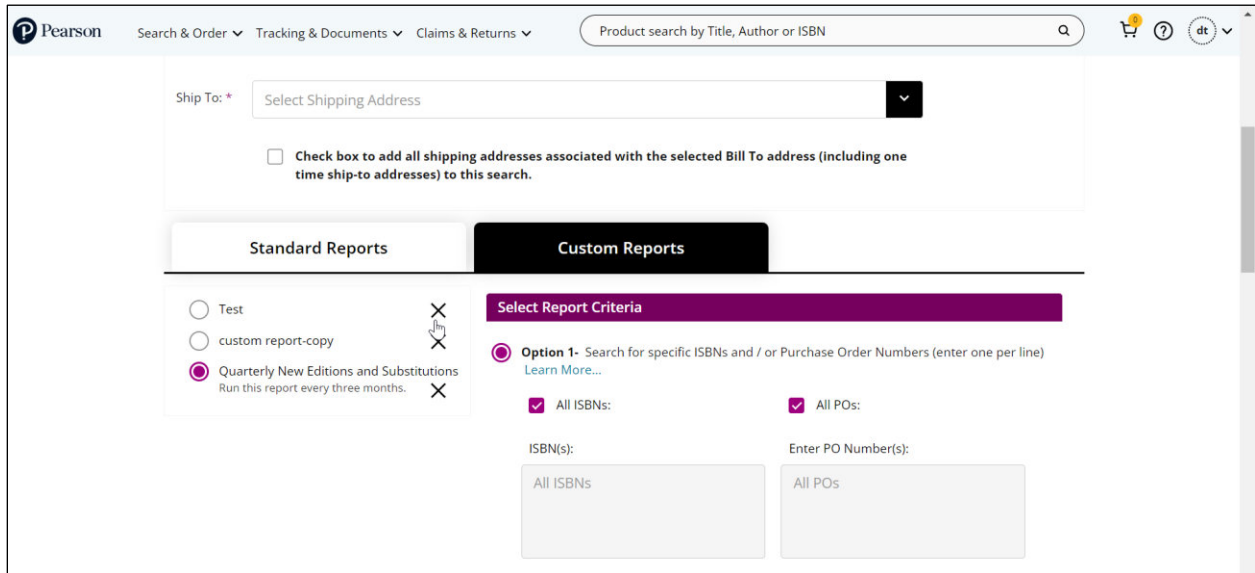1. On the Generate Reports page click the **Custom Reports** tab.

2. Select the custom report you want to run.
3. If needed, 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 Custom Report** and enter a name for the report. As an option you can also enter a description for the report.
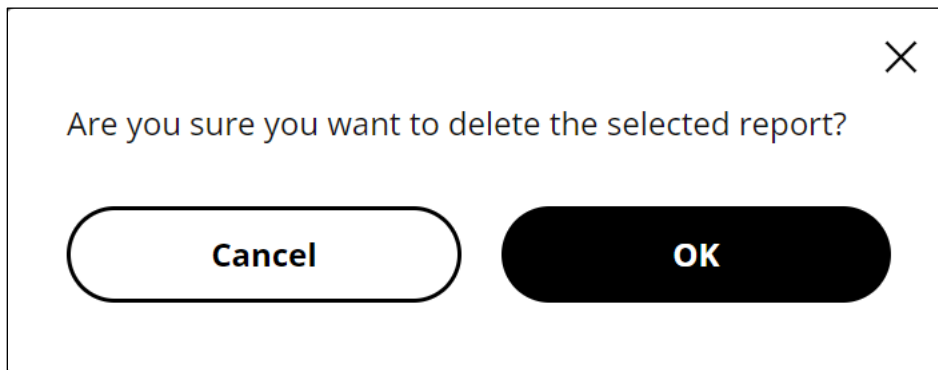6. Click **Go**. If you selected **Display on Screen,** then the report will be saved as a PDF on your computer.

Generating Reports

Delete a custom report

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

2. Click the **X** in the row of the custom report you want to delete.

3. Click **OK**.