

Generating Reports

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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,

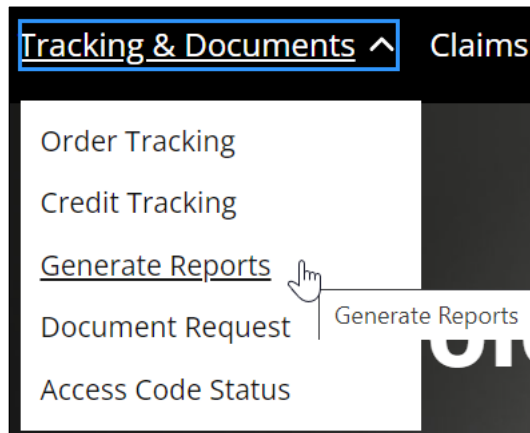
Please note the following about OASIS reports:

- 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.

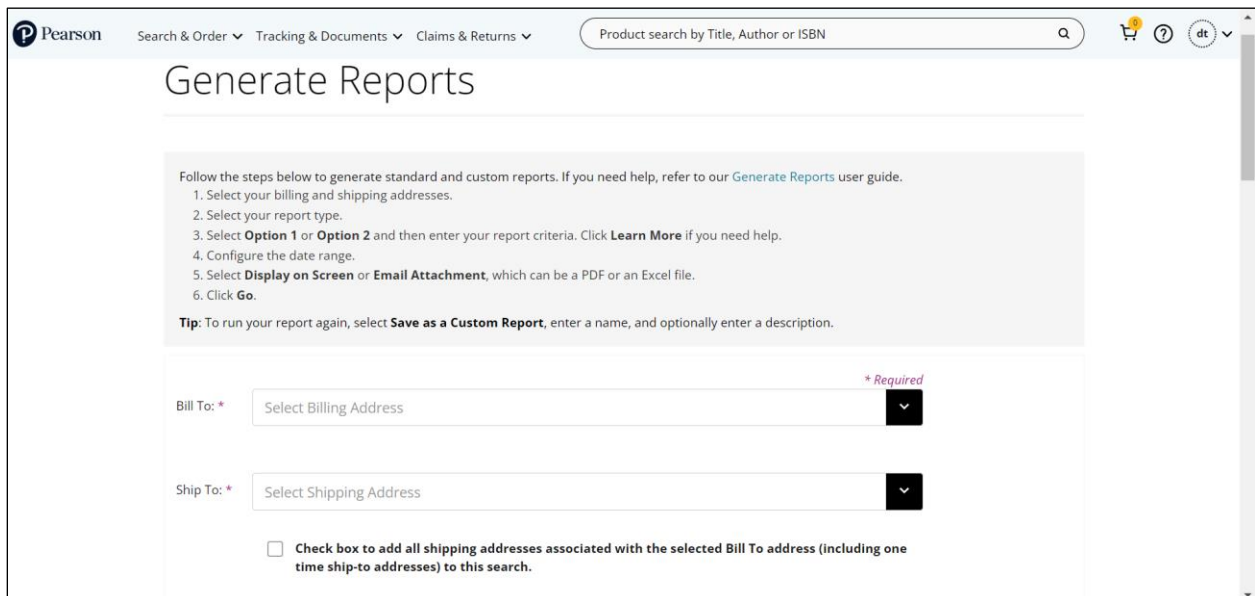
Generating Reports

Generate reports and create custom reports

1. Click **Tracking & Documents**.



2. Select **Generate Reports**.



Follow the steps below to generate standard and custom reports. If you need help, refer to our [Generate Reports user guide](#).

1. Select your billing and shipping addresses.
2. Select your report type.
3. Select **Option 1** or **Option 2** and then enter your report criteria. Click **Learn More** if you need help.
4. Configure the date range.
5. Select **Display on Screen** or **Email Attachment**, which can be a PDF or an Excel file.
6. Click **Go**.

Tip: To run your report again, select **Save as a Custom Report**, enter a name, and optionally enter a description.

Bill To: * * Required

Ship To: *

☐ Check box to add all shipping addresses associated with the selected Bill To address (including one time ship-to addresses) to this search.

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

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- 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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • Select All Chargeback / PO Numbers or enter one or more chargeback or PO numbers. • Select All ISBNs or enter one or more ISBNs. |

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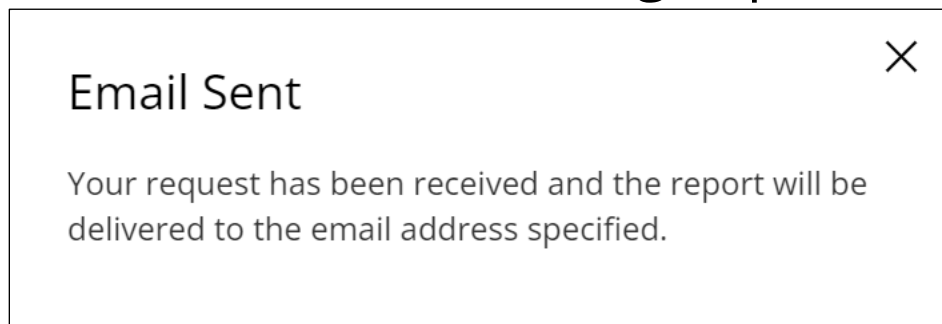
| Option Selection | Report Type | Value Options |
|------------------|---|--|
| Option 2 | All reports except for the credit memo reports. | Enter up to 50 Purchase Order numbers and ISBNs separated by a slash (for example, TXT12345/9780134093413). Enter only one PO and ISBN combination per line. |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

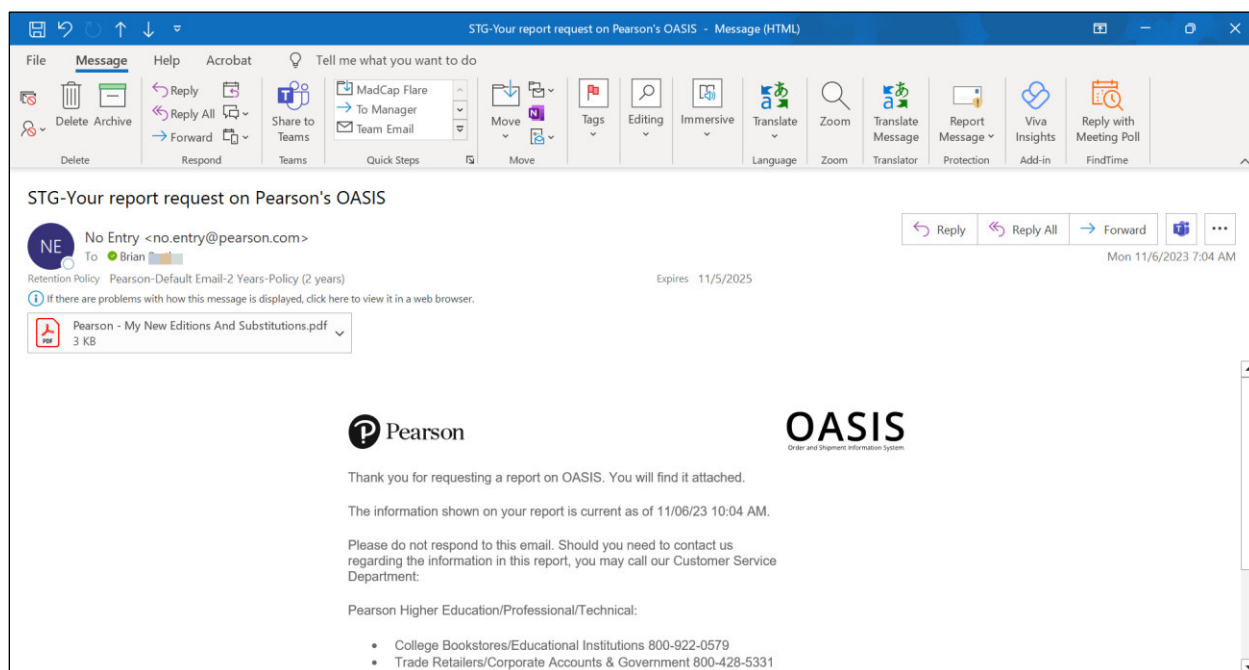
Note: See [Run a custom report](#) and [Delete a custom report](#) for more information.

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.

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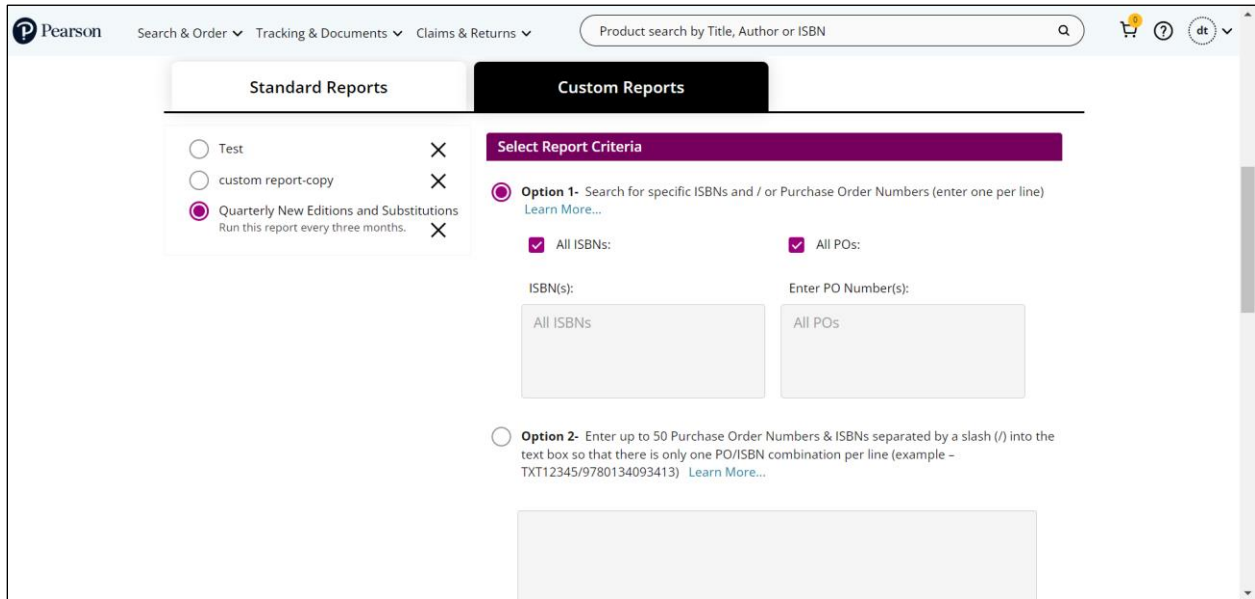
And if you selected email delivery you will receive an email with an attachment.



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Run a custom report

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



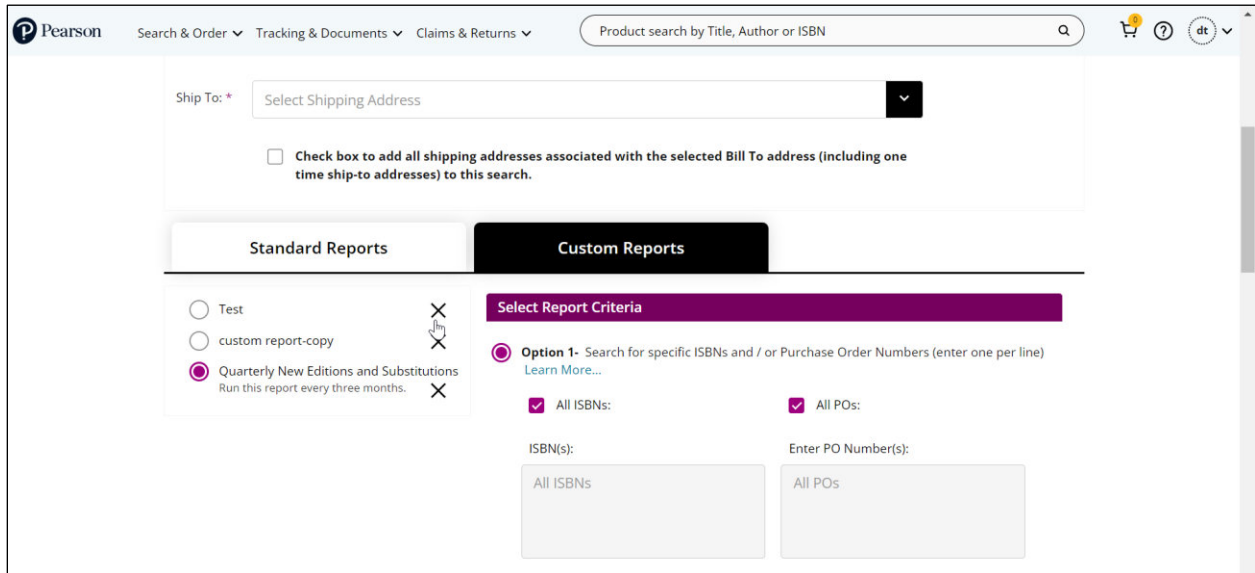
The screenshot shows the Pearson OASIS web interface. At the top, there's a navigation bar with links for Search & Order, Tracking & Documents, and Claims & Returns. A search bar is also present. Below the navigation bar, there are two tabs: 'Standard Reports' and 'Custom Reports'. The 'Custom Reports' tab is active. On the left side, under 'Standard Reports', there are three options: 'Test', 'custom report-copy', and 'Quarterly New Editions and Substitutions'. The 'Quarterly New Editions and Substitutions' option is selected. On the right side, under 'Custom Reports', there's a 'Select Report Criteria' section. It has two options: 'Option 1- Search for specific ISBNs and / or Purchase Order Numbers (enter one per line)' and 'Option 2- Enter up to 50 Purchase Order Numbers & ISBNs separated by a slash (/) into the text box so that there is only one PO/ISBN combination per line (example - TXT12345/9780134093413)'. 'Option 1' is selected. Below 'Option 1', there are two checkboxes: 'All ISBNs:' and 'All POs:'. Both are checked. There are two text input fields: 'ISBN(s):' and 'Enter PO Number(s):'. Below 'Option 2', there is a large text input field.

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.

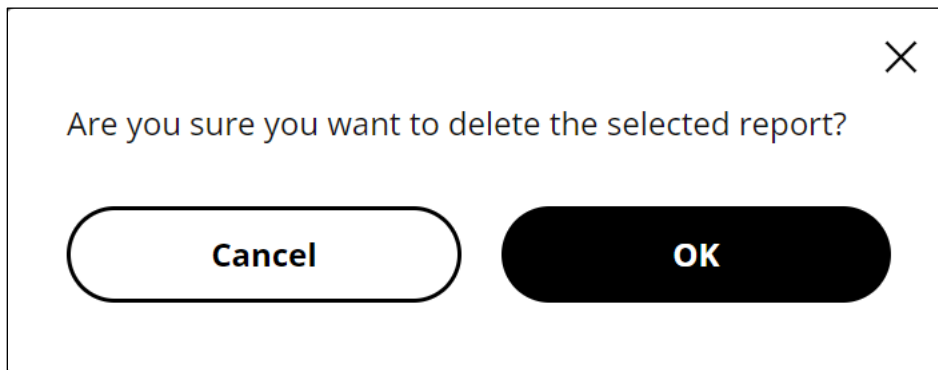
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Delete a custom report

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**.