OASIS

Information Secured

OASIS Bridge User Manual

2025 Edition

Contents

Author:

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Welcome to OASIS Bridge!

Your all-in-one portal for managing physical and digital inventory, tracking items, and submitting orders effortlessly. Our goal is to provide you with a seamless and efficient experience. Supporting a number of industry sectors as diverse as Local Authority, Law Firms, Healthcare and Finance.

This manual offers clear, step-by-step guidance to help you confidently navigate the system. Let us dive in!

How to log in to OASIS Bridge

To log into OASIS Bridge, from your browser, in the URL, type the address:
http://www.oasisgroup.com

This will take you to the OASIS Group website.

1. **Click on the orange Client Portal** button on the right

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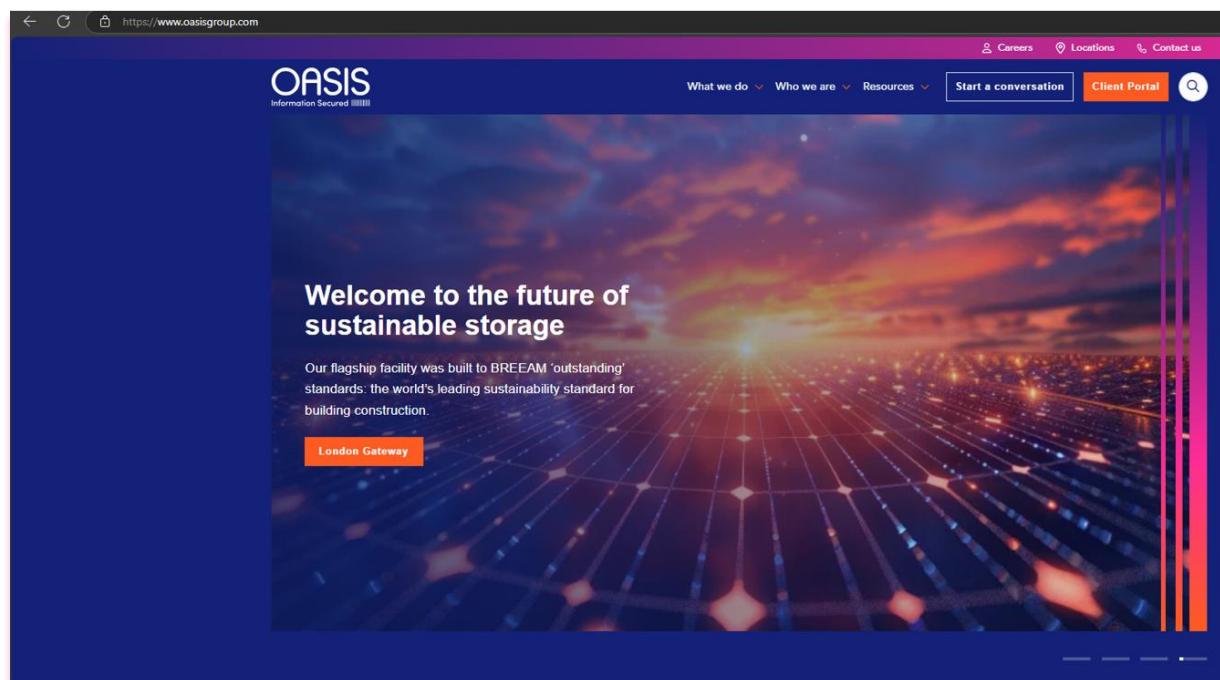
2. **Click on the orange Go to OASIS Bridge** button
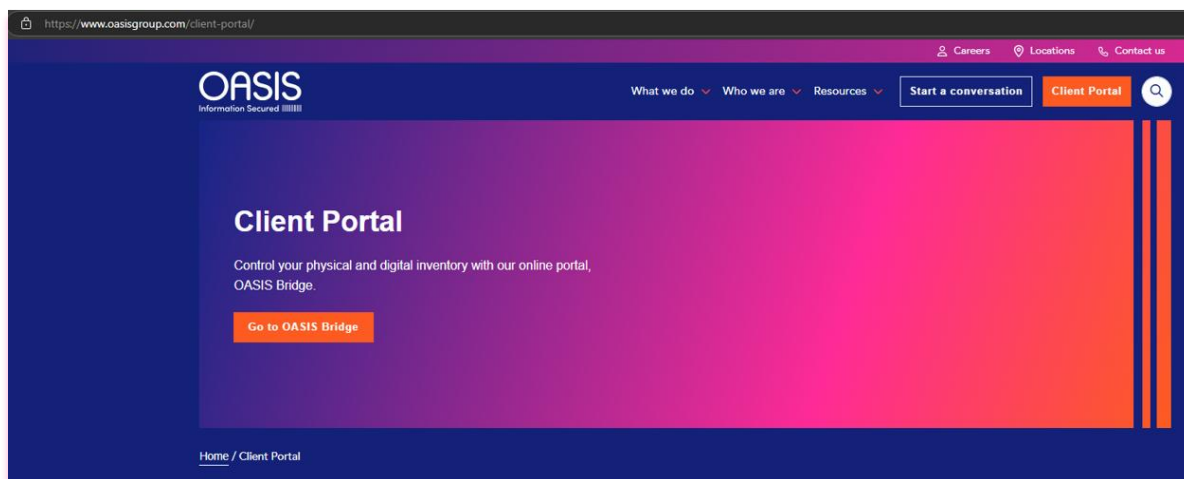
3. Enter your **User ID** and **Password** and **click Log In**

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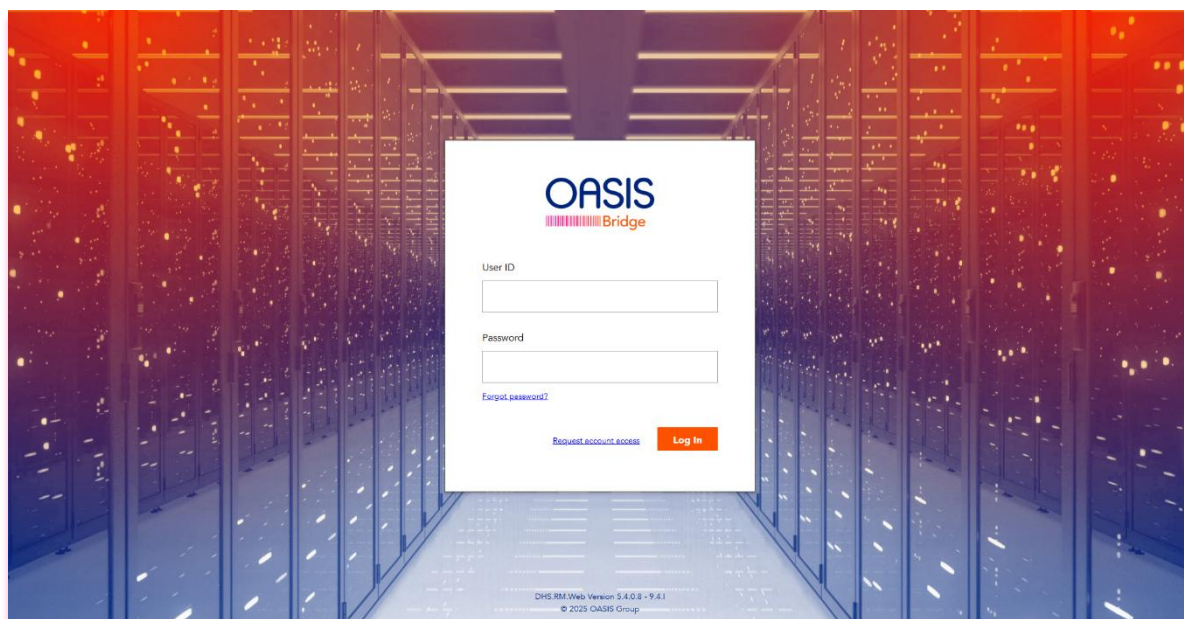
Not already an OASIS Bridge user?

If you do not have OASIS Bridge login credentials, click the **"Request account access"** link in the login dialogue box to begin the registration process.

1. This will redirect you to the **Contact Us** page on our website.
2. From there, click on the **"Already a client? Get in touch"** link to proceed.

3. On **We're here to help** section, complete the online form

Contact Reason

- This field will default to **"I need help with my OASIS Bridge login details"**, so no changes are needed

Training Options

- Leave this blank unless you would like us to arrange a training workshop
- If you require training, select **OASIS Bridge** from the dropdown menu

Company Name

- Enter the **full name** of the company you need access to

Account Number or Customer #

- You can find this on your latest **invoice**
- Please enter the number **exactly as shown**

Email

- Provide your **registered email address**

- This will be used as your **User ID** when we create your OASIS Bridge profile

Description

- Include your **full name and a contact number**, which will be recorded under your user profile when we set it up

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4. Once you click **Submit**, your request will be sent to OASIS.
   o A member of our support team will process your request
   o You will receive an email with your **login credentials** and instructions on how to access the OASIS Bridge portal

If you have any questions or need assistance, please contact our support team.

Resetting your OASIS Bridge Password

If you have forgotten your password, follow these steps to reset it:

1. Access the Forgot Password Link

    1. Go to the **OASIS Group website**
    2. From the homepage, click on the orange **Client Portal** button
    3. Click on **Go to OASIS Bridge**
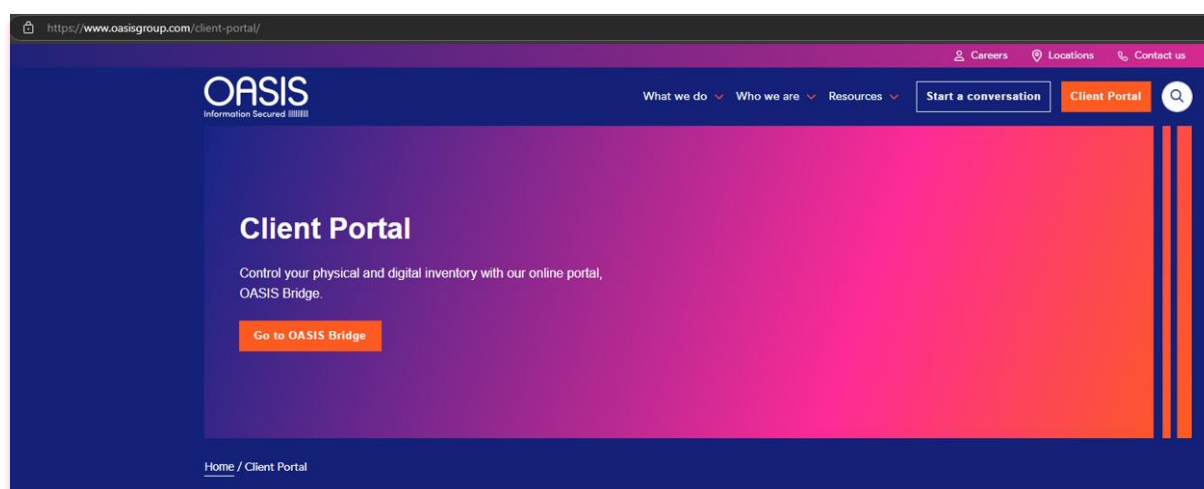
    4. Click on **"Forgot Password?"** below the login fields

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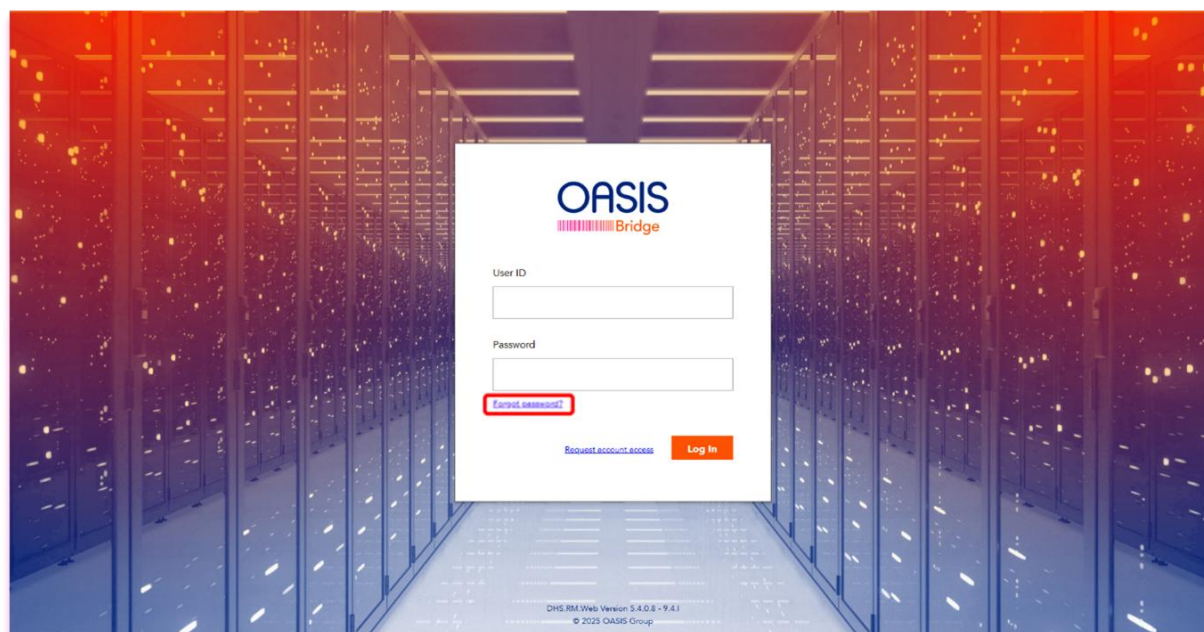
2. Enter Your Registered Email

1. In the password reset request form, enter your **User ID** and **Registered email** address
2. Click **Email Code**

3. Check Your Email for the Authorisation Code

1. Our system will send an **automated email** to your **registered email address**
2. This email will include a **password reset authorisation code**
3. If you don't see the email, check your **spam/junk folder**

4. Enter the Authorisation Code

1. Return to the **Forgot Password?** dialogue box
2. Copy the **authorisation code** from the email
3. Paste it into the **Authorisation Code** text field

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5. Create a New Password

1. Enter a new password in the **New Password** field. Your password must:
   - Contain at least **one letter**
   - Contain at least **one number**
   - Be at least **8 characters long**
2. Re-enter your new password in the **Verify Password** field

6. Confirm the Password Reset

1. Click **"Set Password"** to confirm the change
2. You will receive a confirmation message that your password has been successfully updated

7. Log In with Your New Password

1. Return to the **OASIS Bridge login page**
2. Enter your **email** and **new password** to log in

Need Help?

- If you experience issues or don't receive the authorisation code, please contact our **support team** for assistance.

Portal Overview - Your Dashboard

Understanding your Home Screen

When you log into your **OASIS Bridge** account, you will see a screen like the one below.

Please note:

- Some users may have **additional access** to other functions within **OASIS Bridge**, which may display **more or fewer options** than shown here
- Your available options are based on your **assigned user permissions**

If you believe you should have access to additional features, please contact our **support team** for assistance.

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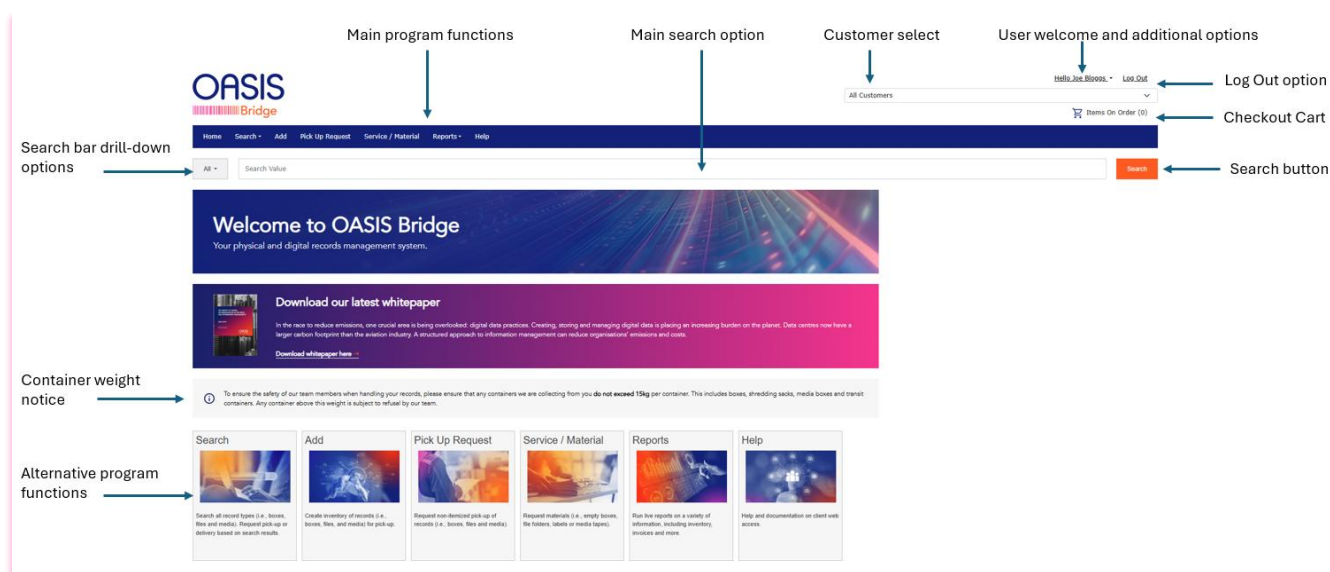
User Options

- In the **top right corner** of the screen, you will see a **user welcome message** along with additional options. This will include the **name of the user currently logged into OASIS Bridge**
- Click on the **dropdown menu** to access additional user options, including:
  - **Changing the language** of the portal
  - **Updating your password** for security purposes

Updating the Portal Language

To change the language of the **OASIS Bridge** portal, follow these steps:

1. Click on the **dropdown menu** in the **top right corner** of the screen
2. Select **"Change Language"** from the available options
3. Choose your preferred language from the list
4. Click **Save** to confirm change
5. The portal will update to display content in the selected language
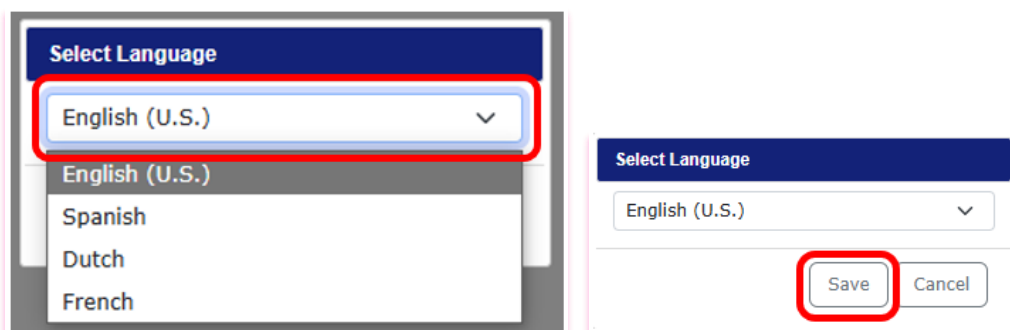
Updating Your Password

To update your password, follow these steps:

1. Click on the **dropdown menu** in the **top right corner** of the screen
2. Select **"Change Password"** from the available options
3. In the **New Password** text field, type your **new password**
4. Confirm the new password by entering it again in the **Re-enter Password** text field
5. Click **Save** to confirm the changes

Your password will now be updated, and you should log out of OASIS Bridge and log back in with your details.

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Selecting a Specific Account

If you have access to multiple accounts, you can select which account to query by following these steps:

1. By default, **OASIS Bridge** will display **All Customers**
2. To select a specific account, click on the **All Customers dropdown**
3. From the dropdown list, choose the relevant account you wish to query
4. In the example below, the user only has access to the **DEMOHR** account, so you can select this account to query

Once you have selected the appropriate account, the system will display the data related to that account.
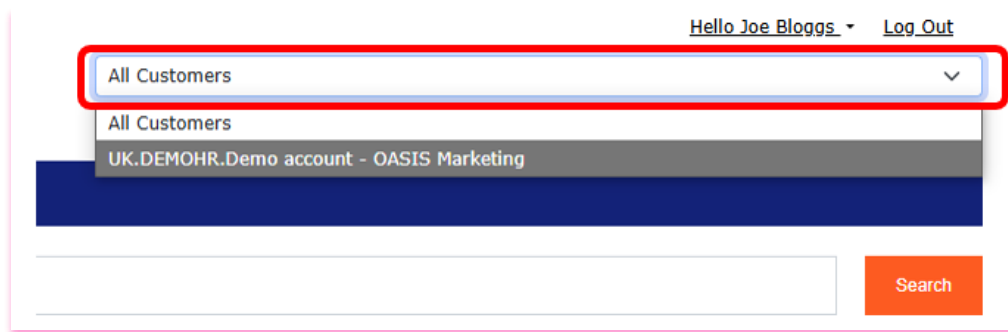
Menu Options

In **OASIS Bridge**, several menu options come with additional sub-options. These options are accessible from the **menu bar** or the clickable **function icons** at the bottom of the screen. Here is how to navigate them:

1. **Main Menu Options**
   - Click on any of the main menu items in the **menu bar** to view additional sub-options related to that function
2. **Alternative Function Select Icons**
   - In addition to the menu bar, you can access more functions by clicking on the **clickable function icons** located at the bottom of the screen
   - These icons will open up additional options, depending on the function selected

By exploring these options, you can easily navigate through the system and access specific features related to your task.

Using the Search Function

When you click on **Search** from the **menu bar**, you will be presented with several additional options to help you find specific items or information. These options include:

1. **Advanced Inventory Search**
   - Use this option for a more detailed and refined search, allowing you to filter by multiple criteria
2. **Single Item Search**
   - This option allows you to search for a specific item based on its details, such as item name or ID
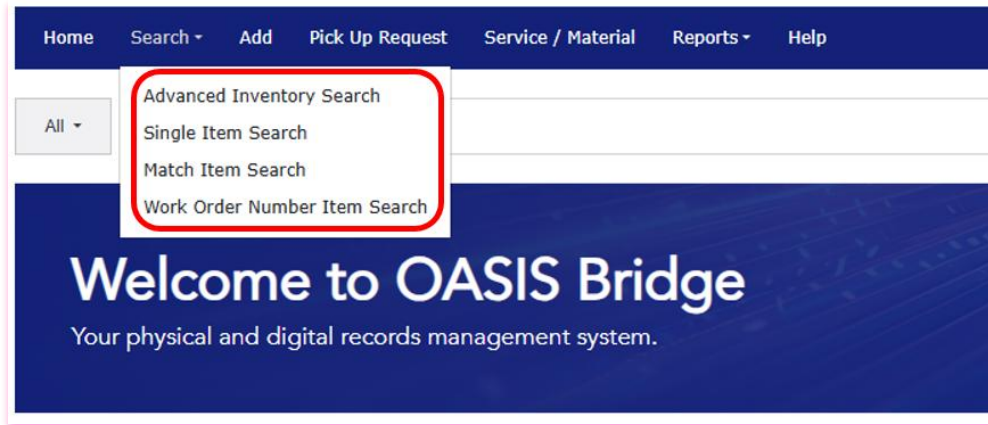3. **Match Item Search**
   - Use this to search for items that closely match the search term or criteria you provide
4. **Work Order Number Item Search**
   - If you're looking for an item related to a specific work order, use this search to locate items associated with the given work order number

Each option provides a unique way to find and filter items based on different criteria.

Using the Reports Function

When you click on the **Reports** dropdown, you will see additional reporting options, including:

1. **Order History**
   - This option allows you to view and generate reports related to past orders, including details like item names, quantities, and dates
2. **General Reports**
   - Use this option to access a variety of general reports that provide insights into system usage, inventory, and other relevant data

These options help you generate specific reports based on your needs.
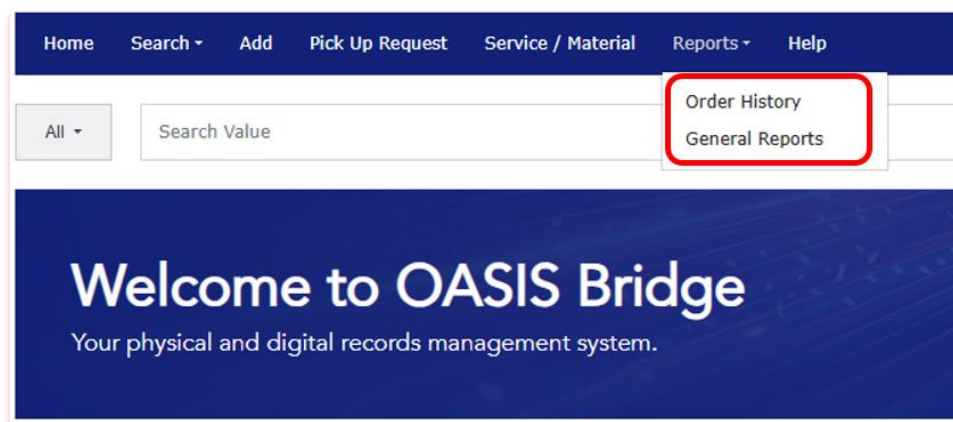
Using Clickable Function Icons

The **clickable function icons** at the bottom of the home page serve as an alternative to the menu bar options. Here is how to use them:
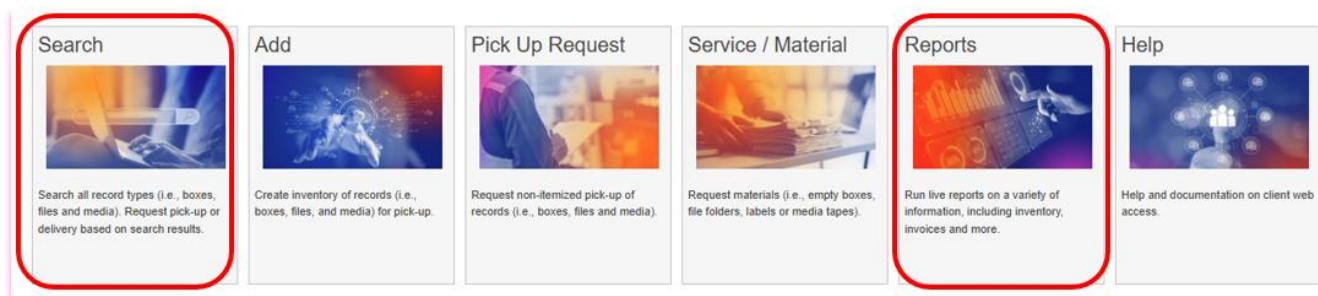
1. **Icon Options**
   - The icons at the bottom of the page represent key functions within **OASIS Bridge**
   - These icons are shortcuts to various features and work just like the options in the menu bar
2. **Functionality**
   - When you click on any of the icons, they will open the associated functions or options, just as if you had selected them from the **menu bar**

This provides a quicker and more accessible way to navigate through the portal.

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How to use the Search options in OASIS Bridge

Search Bar

To search for items quickly on **OASIS Bridge**, you can use the **main search bar** with the drill-down option. Here is how:

1. **Enter Your Search Term**
   - In the **search bar**, input the **reference number** or **OASIS Barcode** for the item you are looking for
2. **Run the Search**
   - After entering the reference or barcode, the system will run a check to see if the item is available for **order** or if it **needs to be returned** to OASIS for storage
3. **Review the Results**
   - The search results will show whether the item can be ordered for **delivery** or if it should be returned to **OASIS** for storage

The **main search bar** allows you to quickly locate items based on their reference or barcode, streamlining your process for ordering or returning items.

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Using the Reference Select Option

The **Reference Select option** to the left of the **search bar** allows you to narrow down your search and target specific reference fields. Here is how to use it:

1. **Select a Reference Field**
   - Click on the **drill-down arrow** next to the search bar. This will display a list of available reference fields (e.g., item name, barcode, order number)
2. **Choose a Specific Field**
   - From the dropdown list, select the **reference field** you want to search within
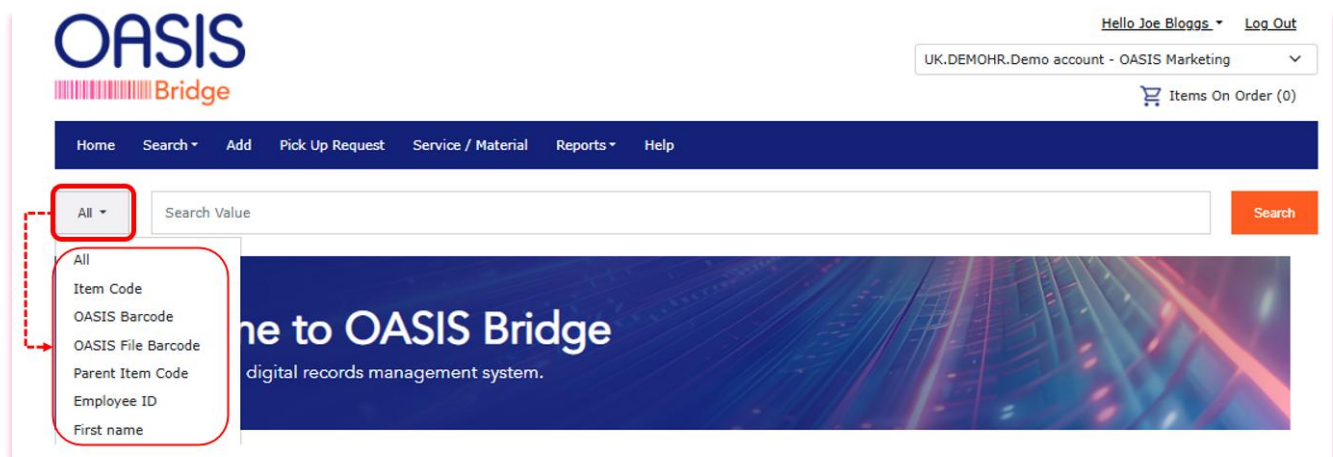3. **Enter Your Search Term**
   - After selecting the reference field, input your **search term** (e.g., barcode, item number, etc.) into the search bar
4. **Run the Search**
   - The system will only check the selected reference field for an **exact or partial match** based on the search term you provided

This feature helps you refine your search and find items more efficiently by focusing on a specific reference field.

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If you leave the **Reference Select option** set to the default **ALL**, the system will perform a **full search** across all reference fields. Here is how it works:

1. **Default Search Setting**
   - When the **reference select option** is set to **ALL**, the system will search through all available reference fields, such as item name, barcode, order number, and more
2. **Run the Search**
   - After entering your search term (e.g., barcode or reference number) in the search bar, the system will check **all reference fields** and return any results it finds

This allows you to search for an item across multiple reference fields at once, making it easier to locate the item without needing to choose a specific field.

Expanding Your Search Using the Wildcard Operator

On the following pages, you will learn how to perform a more flexible search using the **wildcard operator (%)**. This is especially useful when you do not know the exact reference or full barcode of an item.

Searching using Exact Reference

To search using an **exact reference**, follow these steps:

1. **Select a Reference Field**
   - In the **reference select option** next to the search bar, select the **OASIS Barcode** field from the dropdown menu

2. **Enter the Exact Barcode**
   - After selecting the OASIS Barcode field, type the **exact barcode** or reference number of the item into the search bar
   - Once you've entered your search term, click the **orange Search** button to execute the search

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3. **Run the Search**
   - The system will search specifically within the **OASIS Barcode** field and return only the items that match the exact barcode entered
4. **Review the Results**
   - The search results will show the item with the exact match to the barcode you entered

Using this method ensures you retrieve precise results, especially when you know the exact reference or barcode of the item you are searching for.

Using the Wildcard Operator to Search

If you do not know the exact reference or full barcode of an item, you can use the **wildcard operator (%)** to expand your search. Here is how:

1. **Select a Reference Field**
   - In the **drill-down option** next to the search bar, choose the reference field you want to search (e.g., **OASIS Barcode**)
2. **Enter Your Search Term with the Wildcard Operator**
   - Type part of the reference or barcode, and then use the **wildcard operator (%)** to replace the unknown part

   For example:

   - **"12345%"** will find all items whose barcode begins with **"12345"**
   - **"%6789"** will find all items whose barcode ends with **"6789"**
   - **"12%89"** will find items where **"12"** appears at the start and **"89"** appears later in the reference or barcode
3. **Click the Orange Search Button**
   - Once you have entered your search term with the wildcard, click the **orange Search** button to execute the search
4. **Review the Results**
   - The system will return all items that match the pattern you have entered using the wildcard operator

Using the **wildcard operator (%)** allows you to search flexibly for items even if you do not have the full reference or barcode.

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Using the Wildcard Operator (%) Before the Reference

If you do not know the full **OASIS Barcode** and want to replace characters at the **beginning** of the barcode, you can use the **wildcard operator (%)** before the known portion of the barcode. Here is how to do it:

1. **Select the OASIS Barcode Field**
   - From the **drill-down option** next to the search bar, select the **OASIS Barcode** field
2. **Enter the Barcode with the Wildcard at the Beginning**
   - If you know the end part of the barcode, but not the beginning, you can use the wildcard **%** at the start to replace the unknown portion
   - For example, if you know the last part of the barcode is **"3711477"**, but you're unsure of the beginning, you can enter:
     - **"%3711477"**
   - This will find all items whose barcode ends with **"3711477"**, regardless of what comes before it

3. **Click the Orange Search Button**
   - After entering your search term with the wildcard at the beginning, click the **orange Search** button to execute the search
4. **Review the Results**
   - The system will return all items whose barcode ends with **"6789"**, even though you didn't input the full barcode

Using the **wildcard operator (%)** before the reference is helpful when you only know part of the barcode or reference number.

Using the Wildcard Operator (%) After the Reference

If you do not know the full **OASIS Barcode** and want to replace characters at the **end** of the barcode, you can use the **wildcard operator (%)** after the known portion of the barcode. Here is how to do it:

1. **Select the OASIS Barcode Field**
   - From the **drill-down option** next to the search bar, select the **OASIS Barcode** field

2. **Enter the Barcode with the Wildcard at the End**
   - If you know the first part of the barcode but are unsure of the remaining characters, place the wildcard **%** at the end of the known portion
   - For example, if you know the beginning of the barcode is **"0371147"**, but not the rest, you can enter:
     - **"0371147%"**
   - This will find all items whose barcode starts with **"0371147"**, regardless of what follows it

3. **Click the Orange Search Button**
   - After entering your search term with the wildcard at the end, click the **orange Search** button to execute the search
4. **Review the Results**
   - The system will return all items whose barcode starts with **"12345"**, even though you did not enter the full barcode

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Using the **wildcard operator (%)** after the reference is helpful when you know the beginning of the barcode or reference, but not the full code.

Using the Wildcard Operator (%) Before and After the Reference

In some cases, you might not know either the beginning or the end of the reference or barcode. By using the **wildcard operator (%)** both **before and after** the reference, you can search more broadly. Here is how to do it:

1. **Select the Reference Field**
   - From the **drill-down option** next to the search bar, select the reference field you wish to search within (e.g., **OASIS Barcode**)
2. **Enter the Barcode or Reference with Wildcards Before and After**
   - If you know part of the barcode or reference but are unsure of both the beginning and end, you can place the wildcard **%** at both the start and end of your search term
   - For example, if you know the middle part of the barcode is **"371147"**, but you're unsure of what comes before or after, enter:
       - **"%371147%"**
   - This will find all items where **"371147"** appears anywhere in the reference or barcode, regardless of what precedes or follows it

3. **Click the Orange Search Button**
   - After entering your search term with wildcards before and after, click the **orange Search** button to execute the search
4. **Review the Results**
   - The system will return all items where **"6789"** appears in the barcode or reference, whether it's at the beginning, middle, or end of the full barcode/reference

Using the **wildcard operator (%)** before and after the reference helps you perform a broad search, even when you only know a portion of the barcode or reference number.

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Search Result Item Actions

Once you run a search and results are returned, you may have several additional actions available to manage the items or search results, depending on your access level. Here are the key actions that can be taken:

Item Actions

1. **View Item Details**
   - Click on the item to view detailed information, such as item description, availability, location, and other relevant data
2. **Order Items**
   - For eligible items, you may have the option to **submit an order** for delivery, collection, or other actions, based on the permissions associated with your user profile
3. **Edit Item Details**
   - If you have the necessary access rights, you might be able to edit the item details directly from the search results. This could include changing item status or adding comments or notes
4. **Preview Scanned Images**
   - For scanned items, there may be an option to **preview scanned images** that have been uploaded to the OASIS Bridge portal. This allows you to check scanned documents related to the item
5. **Download Item Information**
   - If enabled, you might be able to **download item information** in a report format (e.g., CSV or PDF) to view or save locally

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Search Result Actions

1. **Refine Search**
   - If the results returned are too broad, you can **refine your search** by adjusting the search parameters, such as the **Sort By** option
2. **Export Search Results**
   - For reporting purposes, some users might have the option to **export search results** into formats like CSV or Excel, allowing them to analyze the data offline
3. **Clear Filters/Reset Search**
   - You can **clear any filters** applied to the search results and reset the search bar to start a fresh search. This can be especially helpful when refining searches after an initial attempt

These actions provide flexibility to interact with the search results, depending on the needs and the level of access granted to you.

Number of items found from the search

Search actions

Icon to indicate item type

Additional Item actions

Metadata recorded against the item

Number of Items Found from Searching

Once a search is executed, the system will display the **total number of items** found that match the criteria you entered in the search bar. This includes both **full** and **partial matches** based on the reference, barcode, or other search parameters you specified.

Showing 1 - 3 of 3

Understanding the Total Number of Items Found:

1. **Total Items Count**
   - The number of items found will be displayed at the top of the search results or in a dedicated area on the search results page. This count represents all items that match the search criteria, whether the match is exact or partial
2. **Full or Partial Matches**
   - The system considers both **full matches** (where the reference or barcode exactly matches your input) and **partial matches** (where a part of the reference or barcode matches the search term)
   - For example, if you search for "12345" and there are multiple items whose reference or barcode starts with "12345" or contains it, they will be included in the results
3. **Viewing the Results**
   - The total number of items will help you gauge the scope of your search. If there are too many results, you may want to refine your search to narrow it down. If no results are found, it indicates that no items match the search term exactly or partially
4. **Pagination and Navigation**
   - If the search returns a large number of items, the results may be paginated. You can navigate through multiple pages of search results to view all found items. The total number of items will typically be shown with pagination controls for easier navigation

Example:

- **Search Term:** "12345"
- **Total Items Found:** 50 items (where "12345" appears anywhere in the reference or barcode)

By showing the total number of items found, OASIS Bridge helps you understand the scope of your search and adjust if needed.

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Search Result Menu Options

Once the search results are returned, users can perform several actions related to the results as a whole. These **search actions** help you manage, analyze, and interact with the search results efficiently. Here's a breakdown of the available search actions:

Sort the Results

- Users can **sort** the search results by various parameters, such as item name, reference number, or barcode
- **Sorting Dropdown:** There is typically a **dropdown menu** that allows you to select how you want the results to be ordered, for example:
  - Sort by **Item Name**
  - Sort by **Barcode**
  - Sort by **Date Added**
  - Sort by **Availability**
- This action helps users quickly locate items based on their preferred criteria

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Exclude All

The **Exclude All** action is available when you have multiple items in your search results and want to **deselect all items** at once. This option is useful when you wish to **select specific items** from the results to add to your cart, rather than adding everything to the cart.

How Exclude All Works:

1. **Multiple Items in the Search Results**
   - After running a search, you will likely see a list of items based on your search criteria
2. **Click Exclude All**
   - At the top or bottom of the search results page, there will be an **Exclude All** button. When you click this, it will **deselect all items** in the search results. This means that none of the items will be selected for further actions (such as adding to the cart)
3. **Select Specific Items**
   - Once all items are deselected, you can manually select only the specific items you want to add to your cart. This can be done by checking the box next to each item
4. **Add Selected Items to Cart**
   - After selecting the items you wish to add, you can proceed to add them to your cart

Why Use Exclude All?

- **Efficiency:** This feature saves time by allowing you to deselect all items quickly, especially when you only need a few items from a large search result
- **Selective Action:** It helps when you only want to perform actions (like adding to the cart) for specific items rather than everything displayed

Display Long Description and Item Notes

In **OASIS Bridge**, to improve the display of search results and maximize the space available for other item information, certain fields like **Long Description** and **Item Notes** are hidden by default. However, these fields can contain a significant amount of information, and you can choose to display them if needed.

1. Long Description

- The **Long Description** field can contain up to **nine hundred characters**. This is typically a detailed description of the item, providing more in-depth information beyond just the name or reference
- By default, this field is hidden in the search results to streamline the view and display key information only
- **How to Display Long Description:**
  - There will be an option or toggle within the search results to show the **Long Description** for each item. Once clicked, this will reveal the full description for that specific item

2. Index Notes

- The **Index Notes** field can hold up to **three thousand characters**, providing additional context or comments about the item. This can be especially useful for tracking item-specific notes, such as condition, special handling instructions, or any other relevant details
- Like the **Long Description**, the **Index Notes** are hidden by default to keep the search results concise
- **How to Display Index Notes:**
  - Similar to the **Long Description**, you will be able to toggle or click to display the **Index Notes** when necessary. This reveals any additional notes related to the item in your search results

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Why Are These Fields Hidden by Default?

- **Maximizing Screen Space:** Hiding these fields helps ensure that only the most relevant and concise information is displayed by default, such as item name, barcode, or availability
- **Improved User Experience:** With potentially large text fields (900 characters for Long Description, 3000 for Index Notes), displaying them by default could overwhelm the screen. By keeping them hidden, the system provides a cleaner, more navigable interface

Inventory Report from Search Results

Once you have your search results on screen in **OASIS Bridge**, you have the option to generate an **Inventory Report** based on the items displayed. This report can be exported to different formats, including **PDF** (the default format) and **Excel**, for further analysis or record-keeping.

How to Generate an Inventory Report:

1. **View Search Results**
   - First, ensure that your search results are displayed on the screen, showing all relevant items you want to include in the inventory report
2. **Generate the Report**
   - Look for the **"Inventory Report"** option, which is typically found at the top
   - You will be given options to export the results into various formats
3. **Select Export Format**
   - **PDF (Default format):** This is the default export option. Selecting this will create a report in PDF format, which you can easily print or share
   - **Excel:** If you prefer working with the data in a spreadsheet for further analysis, select the **Excel** option. This allows you to manipulate, sort, and analyze the inventory data using Excel

4. **Print/Download the Report**
   - Once you have selected the desired format (PDF or Excel), the system will generate the report and provide a **download link**
   - Click on the link to print/download and save the report to your local device

Inventory Export Preview

Why Use the Inventory Report Feature?

- **Quick Overview:** The inventory report provides a snapshot of all the items in your search results, allowing you to easily review and manage item details
- **Export for Analysis or Sharing:** Exporting the data to **Excel** gives you more flexibility to analyze the inventory, perform calculations, or share it with team members
- **Record-Keeping:** The **PDF format** is ideal for keeping records of the search results, making it easier to reference later or present in meetings

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Excel Export

If you want to download the search results from **OASIS Bridge** into an **Excel** file for further analysis or record-keeping.

How to Export Search Results to Excel

1. **Run the Search**
   - First, ensure that you have performed your search and have the results displayed on the screen
2. **Click on Excel Export**
   - In the search results screen, look for the **Excel Export** button, usually located at the top or bottom of the page
   - Clicking this button will trigger the system to prepare the search results for export
3. **Download the Excel File**
   - After clicking the **Excel Export** button, the system will generate an Excel file with all the details of your search results
   - This file will be automatically **downloaded to your computer**
4. **Locate the File**
   - The downloaded file will typically be saved in your **Downloads folder** (or the folder designated for downloads based on your browser settings)
   - The file will be named with a default name or may include a timestamp to differentiate it from other files
5. **Open the Excel File**
   - Navigate to the **Downloads folder** and open the Excel file. The contents will include the data of the items found in your search results, allowing you to manipulate, sort, or analyze the data as needed

Why Use Excel Export?

- **Data Analysis:** Exporting to Excel allows you to sort, filter, and analyze the data more efficiently, especially for large sets of items
- **Record-Keeping:** The exported Excel file can be saved for future reference or shared with colleagues
- **Flexibility:** Excel allows you to easily modify or customize the data if needed, such as adding custom columns or performing calculations

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Clear All in Search Results/Items in Cart

The **Clear All** icon in OASIS Bridge allows you to **reset** the search results and remove any items that have been displayed on the screen. This is helpful if you want to start a new search without manually clearing each item or filter.

How to Use the Clear All Icon

1. **Display Search Results**
   - First, ensure that you have performed a search, and the results are visible on your screen
2. **Click on the Clear All Icon**
   - Look for the **Clear All icon** on the page. This icon may appear as a trash bin, a reset symbol, or another similar representation, depending on the interface design
   - Clicking the **Clear All** icon will remove all the search results that are currently displayed on the screen
3. **Reset the Search**
   - After clicking the icon, the page will refresh, and all the search results will be cleared. This action resets the search results back to an empty state, making room for a new search or allowing you to refine the search parameters

Why Use the Clear All Icon?

- **Quick Reset:** It's a convenient way to clear all search results quickly when you no longer need the displayed data or wish to start a fresh search
- **Prepare for a New Search:** This function is useful when you want to remove previous results and start a new search without any old filters or results lingering on the page

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Item Global Actions

Item Global Actions in OASIS Bridge provide users with the ability to perform actions on multiple items at once. This can streamline processes, especially when dealing with bulk actions like adding items to the cart for delivery or collection.

How to Use Item Global Actions

1. **Select Items from the Search Results**
   - First, ensure that you have run a search, and the relevant items are displayed on the screen
   - Use the checkboxes next to the items to select the ones you want to include in the action
2. **Click on "Item Global Actions"**
   - Once you have selected the desired items, look for the **Item Global Actions** option, typically located at the top or bottom of the search results page
3. **Choose the Appropriate Action**
   - Clicking on **Item Global Actions** will provide you with several options for handling the selected items. Two key actions are:
     - **Request from Off Site:** This option allows you to **add selected items to the cart for delivery** from an off-site location. If the items are not currently in your local inventory but are available elsewhere, this option facilitates the request for delivery
     - **Send Off Site:** This action **adds selected items to the cart for collection**. If you need to return or collect items from an off-site location, this option initiates that process
4. **Add to Cart**
   - After selecting either **Request from Off Site** or **Send Off Site**, the system will automatically add the selected items to your cart so you can then proceed with the usual process for placing an order or managing the items in your cart

Why Use Item Global Actions?

- **Bulk Processing:** These actions allow you to perform operations on multiple items at once, saving time when dealing with larger quantities
- **Efficient Cart Management:** Instead of manually adding each item to the cart, you can quickly add all selected items to either the delivery or collection cart
- **Streamlined Workflows:** Whether you're requesting items from off-site for delivery or preparing items for collection, these actions make the process smoother

Item Type Icons

In **OASIS Bridge**, the system uses **visual icons** to easily differentiate between various **item types** within the search results. These icons help you quickly identify the type of item you are working with, making it easier to manage and organize your inventory.

Item Type Icons

1. **Box Icon**
   - **Description:** Represents items stored as boxes
   - **Visual:** The icon is typically a small box image, indicating that the item is a box in your inventory

2. **File Icon**
   - **Description:** Represents items stored as files
   - **Visual:** The icon usually looks like a file folder, helping you identify file-type items in your search results

3. **Document Icon**
   - **Description:** Represents individual documents
   - **Visual:** The document icon typically resembles a document to signify items classified as documents in your search results

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4. **Tape Icon**
   - **Description:** Represents items stored on tapes (such as backup tapes)
   - **Visual:** The icon typically shows a cassette tape or something similar, clearly marking items stored in tape format

How the Icons Help

- **Quick Identification:** By simply glancing at the icons, you can quickly determine whether the item is a **Box**, **File**, **Document**, or **Tape** without needing to read through detailed descriptions
- **Improved Navigation:** This helps you streamline your searches and operations, especially when you're managing various types of items (e.g., files vs. tapes)
- **Efficient Organization:** The icons make it easier to organize or filter items based on their type, helping you to perform actions (e.g., adding to the cart or processing requests) more effectively

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Additional Item Actions

Users with the appropriate **access level** in **OASIS Bridge** can perform various additional actions on individual items. These actions help with inventory management, record-keeping, and requesting specific items.
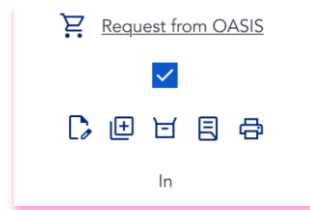
Available Additional Item Actions

1. **Edit Item Information**
   - Allows users to update or modify the details of an item
   - This may include updating metadata such as the item's description, category, or status
2. **Add a New Item to a Box**
   - Enables users to add a new file, document, or other items to an existing storage box
   - This is useful for maintaining accurate records when new documents are added to an archive
3. **Request a Non-Indexed Item from a Box**
   - This action allows users to request a file that is inside a box but has **not been barcoded** individually
   - Useful when a specific file within a stored box is needed for retrieval without retrieving the entire box
4. **Generate an Item Activity Report**
   - Creates a report detailing the activity and history of an item
   - The report may include information such as previous requests, movements, and modifications to the item
5. **Print Item Details**
   - Allows users to print a record of an item's details for **documentation or offline reference**
   - The printed record can be used for audits, manual tracking, or archiving purposes

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Why Use These Actions?

- **Better Inventory Management:** Keep records up to date by editing or adding new items when necessary
- **Efficient Retrieval:** Request specific files without needing to retrieve an entire box
- **Improved Record-Keeping:** Generate reports and print details for audits, compliance, or reference

Request from OASIS

The **Request from OASIS** option allows users to add items to their cart for delivery from an **off-site storage facility**. This feature is useful when you need to retrieve a stored item and have it delivered to your location.
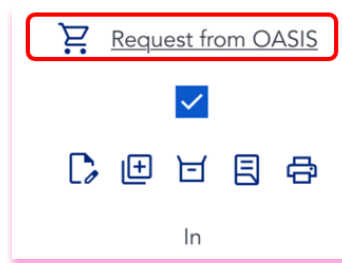
How to Request an Item from OASIS

1. **Locate the Item**
   - Use the **Search** function to find the item you need
   - Ensure the correct item appears in the search results
2. **Click "Request from OASIS"**
   - In the item actions menu, click the **Request from OASIS** link next to the item
   - This will add the selected item to your cart for ordering
3. **Review Your Cart**
   - Navigate to the **Cart** to review the items you have requested
   - Make any necessary adjustments before proceeding
4. **Submit the Order for Delivery**
   - Once you have confirmed the items in your cart, proceed to **place the order**
   - The OASIS team will then **process your request** and arrange delivery

Why Use This Feature?

- **Quick Retrieval:** Easily request archived items without manual paperwork
- **Streamlined Ordering:** Add multiple items to your cart in one session
- **Efficient Tracking:** Ensures that requested items are logged and can be monitored

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Select/Deselect Item

The **Select/Deselect Item** feature allows users to **choose which items** from the search results should be included in an action, such as adding items to the cart for delivery or collection.
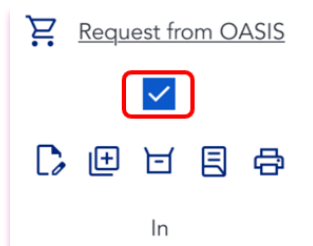
How to Use the Select/Deselect Feature

1. **Locate Your Search Results**
   - Perform a **search** to display the relevant items
2. **Select an Item**
   - Click the **blue checkbox** next to an item to **deselect** it (*selected by default*)
   - The selected item will be excluded when adding to the cart or performing other actions
3. **Select an Item**
   - Clicking the **blue checkbox again** will **select** the item
   - Selected items will be **included** if you choose to add all items to the cart
4. **Exclude All Items (Optional)**
   - If you want to clear all selections at once, use the **Exclude All** option to deselect everything

Why Use This Feature?

- **Flexible Selection:** Choose only the items you need instead of adding everything to the cart
- **Prevents Unnecessary Orders:** Avoid ordering unwanted items by deselecting them
- **Efficient Bulk Actions:** Quickly include or exclude multiple items as needed

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The **Edit Item** function allows authorized users to update reference data recorded against an item. However, access to this feature depends on the user's **permissions and access rights** within the system.
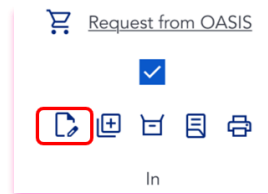
How to Edit an Item

1. **Locate the Item**
   - Use the **Search** function to find the item that needs updating
2. **Click the "Edit Item" Icon**
   - Select the **Edit Item** image or button next to the relevant item
   - This will open the item's details for modification
3. **Update Reference Data**
   - Modify any necessary fields such as:
     - **Description**
     - **Index Notes**
     - **Reference Numbers**
     - **Category Information**
   - Ensure all changes are correct before proceeding

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4. **Save Changes**
   - Click **Save** to confirm and apply the updates

Access Limitations

- **Not all users can edit items**—permissions are determined by the system administrator
- If you do **not** have edit access, you may need to **request changes** through a supervisor or admin

Why Use This Feature?

- **Keeps records accurate** with up-to-date information
- **Ensures compliance** with indexing and reference standards
- **Streamlines item management** by allowing quick adjustments

Add Item to Parent

The **Add Item to Parent** option enables authorized users to **add barcoded files or documents to an existing box**. This ensures accurate inventory management and helps maintain structured storage within the OASIS system.
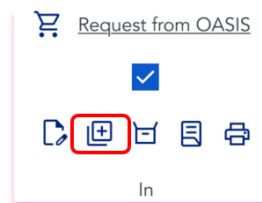
How to Use "Add Item to Parent"

1. **Locate the Parent Box**
   - Use the **Search** function to find the **box** where the new item will be added
2. **Click "Add Item to Parent"**
   - Select the option next to the relevant box
3. **Enter Item Details**
   - Input the barcode of the **file or document** being added
   - Update any **reference data**, such as description or category

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4. **Save Changes**
   - Click **Save** to confirm the addition of the new item to the box
   - Click **Close**

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Items on Order Cart Update

Once an item has been successfully added to a **parent box**, the system will automatically update the **Items On Order** cart on the home screen.

What Happens Next?

- **The newly added file** will now appear in the **Items On Order** cart
- This confirms that the **file has been successfully linked** to the parent box
- Users can now proceed to review and submit orders as needed

Next Steps

1. **Review the Items On Order cart** to ensure the correct file has been added
2. If further changes are needed, use the **Edit Item** option
3. Proceed with placing an **order request** if retrieval or delivery is required

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This feature helps maintain **clear tracking and organization** of all items added within the system.

Access Limitations

- Only users with the **relevant access level** can add items to a box
- If access is restricted, users may need to request assistance from an **administrator**

Why Use This Feature?

- **Ensures accurate tracking** of files within storage boxes
- **Streamlines organization** by keeping related documents together
- **Maintains compliance** with record-keeping standards

Request Non-Indexed Contents

The **Request Non-Indexed Contents** option allows clients to **request files from an unmanaged box** when:

- The **box has been received**, but its contents have **not been barcoded**
- The **file details were not recorded** in the inventory system
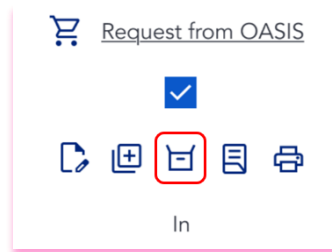
How to Request Non-Indexed Contents

1. **Locate the Box**
   - Use the **Search** function to find the **unmanaged box** that contains the file(s) you need
2. **Click "Request Non-Indexed Contents"**
   - This option is available for **unmanaged boxes** where specific file details are missing
3. **Enter File Details**
   - Provide a description or any available reference details about the requested file
   - If known, specify **approximate location** within the box

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4. **Submit the Request**
   - Click **Request New** to add the file details to the box

Why Use This Feature?

- **Access files that were not barcoded or indexed** in the system
- **Ensure smooth retrieval** of important documents from unmanaged storage
- **Minimize delays** when needing files that were not originally logged

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Managing Requested Non-Indexed Contents

Once a **new file request** has been created for a **non-indexed item**, it will be displayed in the **Request Contents** dialogue box under the **Request New Items** section.

Reviewing Your Request

- The **new file** will now appear in the list of requested items
- Use the **scroll bar** to view additional details entered during the request
- If multiple items have been added, use the **page navigation links** at the bottom to move between pages

Final Steps

1. **Review the request details** to ensure accuracy
2. **Click "Close"** to exit the **Request Contents** dialogue box
3. You will return to the **results screen,** where you can continue working within OASIS Bridge

Finalizing the Request for Non-Indexed Contents in OASIS Bridge

Once a **non-indexed file request** has been created, OASIS Bridge will:

- **Automatically generate a record** for the file
- **Add the requested file** to the **Items On Order cart**

Next Steps – Completing the Order

1. **Decide on the Type of Web Order:**
   - **If you want to save the file in your inventory:**
     → Submit a **Detailed Indexing** web order
   - **If you need the file physically delivered:**
     → Submit a **Next Day (Standard Service)** web order
2. **Submit the Order:**
   - Navigate to the **cart** and review the requested item
   - Follow the steps outlined in the **How to Add New Items** and **How to Create Web Orders** sections
   - Submit the order to OASIS for processing

By completing the order, you ensure the **file is either indexed for future use or delivered as required**.

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Generating Item Reports

The **Item Reports** feature allows users to run an **Item Activity Report** for a specific item. This provides a **detailed history** of the item's movements, actions, and status updates.
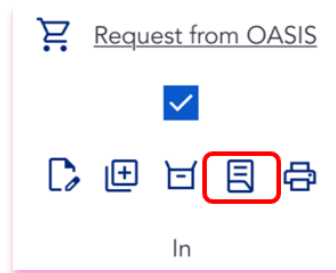
How to Run the Web Module Item Activity Report

1. **Locate the Item**
   - Use the **Search** function to find the item you want to report on
2. **Click on "Item Reports"**
   - This will open the reporting options for the selected item
3. **Select "Web Module Item Activity Report"**
   - The report will display **all recorded actions** related to the item, such as:

     - When it was added to the system
     - Any requests, deliveries, or movements
     - Any modifications or status changes
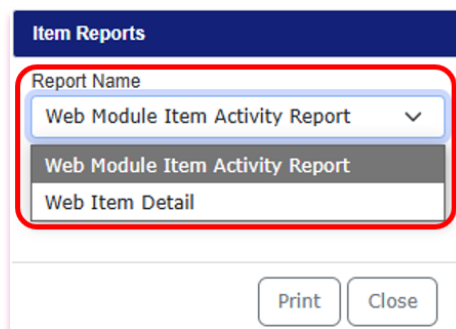
4. **Download or Print the Report**
   - You can choose to **export the report** in different formats (PDF, Excel)
   - If needed, print a hard copy for records

Preview

Why Use This Feature?

- Provides a **detailed history** of the item's activity
- Helps track **item movements and requests**
- Ensures **compliance with records management policies**

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Generating a Web Item Detail Report

The **Web Item Detail Report** provides detailed information about an individual item, such as its description, status, and other relevant attributes.

How to Run a Web Item Detail Report

1. **Locate the Item**
   - Use the **Search** function to find the specific item you wish to generate the report for
2. **Select "Web Item Detail"**
   - From the **Report Name dropdown**, choose the **Web Item Detail** option
3. **Choose the Report Type**
   - In the **Report Type dropdown**, select the file format you prefer to download or display the report in (e.g., **PDF** or **Excel**)
   - **PDF** is the default format
4. **Generate the Report**
   - Once you've selected your preferred file format, click **Print** to generate the report
5. **View the Report**
   - If you selected **PDF**, the report would open in a new tab of your web browser
   - You can **download or print** the report as needed

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What the Report Contains

The **Web Item Detail Report** will display all the relevant details for the item, including:

- Description
- Status
- Barcode and other identification info
- Any recorded movements or actions

Why Use This Report?

- Provides a **comprehensive overview** of the item's details
- Useful for **tracking item status** and ensuring accurate record-keeping
- Can be used for **audit or review purposes**

Printing the Item Detail Report

The **Print Item Detail Report** allows users to print a detailed report for a specific item directly from OASIS Bridge.
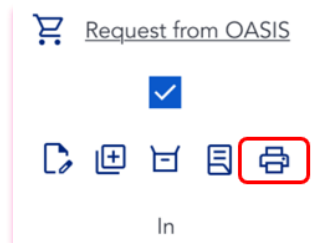
How to Print the Item Detail Report

1. **Locate the Item**
   - Use the **Search** function to find the item for which you want to print a detailed report
2. **Click the Print Icon**
   - Look for the **Print icon** (usually represented by a printer image) in the **Item Actions** section
3. **Generate the Report**
   - Clicking the print icon will automatically generate a **printable version** of the **Item Detail Report**
4. **Review and Print**
   - The report will be displayed in a **printable format**, and you can **print it directly** from your browser

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Preview

OASIS Barcode: DSB46515748	Child Item(s): (2)
FBU: UK	Customer: DEMOHR:Demo account - OASIS Marketing
Department: DEPT 4.DEPARTMENT 4	Internal Box Reference: BOX 1703
Year: 2023	Additional Information: Attendance records 2023
Location: W4G0202O01	Add Date: 27/02/2023
Destroy/Review Date: 31/12/2030	Retention: 7 Years - 7 Years

Why Use This Feature?

- Quick and easy way to generate a **physical copy** of an item's details
- Helpful for **records management** and **auditing purposes**
- Can be used for **in-person reference** when handling items

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Viewing Item Metadata

The **Item Metadata** refers to the data that has been recorded against an item, whether by the user or by OASIS. This metadata includes important details that help identify and track the item within the system.

How to View Item Metadata

1. **Search for the Item**
   - Use the **Search** function to find the item in question
2. **Check the Item Metadata**
   - In the **search results**, look for the **highlighted area** where the metadata is displayed
3. **Key Metadata Information:**
   - **OASIS Barcode**: This is the unique identifier for the item
   - **FBU (Region Account)**: The region or account that the item belongs to
   - **Customer (Account Code and Name)**: The account details related to the item
   - **Reference Information**: Any additional references, including item IDs, descriptions, or other tracking information
4. **Variation in Data:**
   - Depending on the account's requirements, there may be **additional or fewer details** shown. The system will adapt based on the specific needs of the account and user settings

Why Is Item Metadata Important?
- Helps in accurately identifying and tracking items
- Provides essential details for **inventory management** and **order processing**
- Makes it easier for users to quickly find and access the right item information

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Advanced Inventory Search in OASIS Bridge

The **Advanced Inventory Search** feature allows users to refine their search criteria to locate specific items more efficiently. This tool provides more filtering options compared to the basic search, helping users narrow down their results based on multiple attributes.

How to Use the Advanced Inventory Search

1. **Access the Advanced Inventory Search**
   - Click on **Search** from the menu bar
   - Select **Advanced Inventory Search** from the dropdown options

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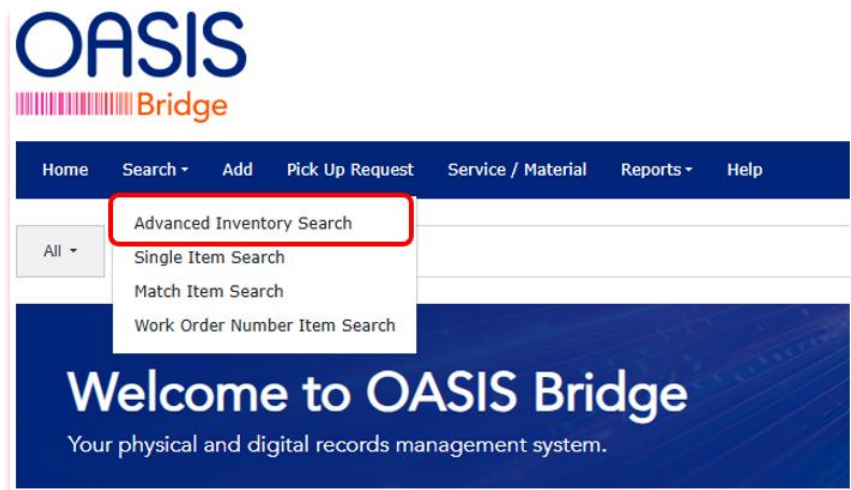
2. **Select Search Filters**

Users can refine their search by selecting one or multiple filters, including:

- **Item Type** (e.g., Box, File, Document, Tape)
- **Department** (e.g., HR, Finance, Legal)
- **Item Status** (e.g., In, Out, Destroyed)

Filtering by Customer and Department in Advanced Inventory Search

When using the **Advanced Inventory Search** in OASIS Bridge, users can refine their search based on the **Customer** and **Department** fields to locate specific items more efficiently.

Customer Field (Auto-Selected)

- The **Customer** field will automatically default to the **same customer** selected from the top of the screen
- If you have access to multiple accounts, you can change this selection by choosing a different customer from the dropdown

Selecting a Department

- Click on the **Department** field to open the dropdown list
- Select **one department** by clicking on the relevant option

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Selecting Multiple Departments

- If needed, you can select multiple departments by clicking on **each department name** in the dropdown list
- Selected departments will be highlighted to indicate they are included in the search criteria

Why Use the Customer & Department Filters?
- Helps users **focus on specific business units** within a company
- Makes it easier to **find items assigned to a particular department**
- **Speeds up search results** when dealing with a large inventory

3. **Selecting an Item Type**

- Click on the **Type** dropdown menu
- Choose a **specific item type** (e.g., Box, File, Document, Tape)
- If you are unsure of the item type, leave this field set to **All** to search across all types

Why Use the Item Type Filter?
- Helps **narrow down results** when searching for a specific item
- Reduces search time by eliminating unrelated items
- Ensures you locate the **correct format** (e.g., only files instead of boxes)

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4. Service Code Field

The **Service Code** field in **Advanced Inventory Search** is set to **"All Codes"** by default. This ensures that your search includes items across all available service codes.

Leave the Service Code field as Default

- By default, the **Service Code** field is set to **"All Codes"**, allowing the search to include all service types

Optional: Select a Specific Service Code

- If you want to filter results by a specific service, click on the **Service Code** dropdown
- Select the required service code from the list

Why Leave the Service Code Field as Default?

- Ensures **no items are excluded** from the search
- Allows a **broader search** when you are unsure of the service code
- Useful when looking for **all items regardless of service type**

5. Filtering by Item Status

- The **Item Status** filter allows users to refine their search based on the status of an item
- This helps locate items more efficiently and understand their movement history

6. **Selecting an Item Status**

- Click on the **Item Status** dropdown
- Choose a specific status or leave it as **All** (default) to include all item statuses

Item Status Options Explained

- **All** – Default option that includes all items regardless of their current status
- **Out** – Items retrieved by the client but expected to be returned to OASIS storage
- **In** – Items currently stored with OASIS
- **In/Out** – Items both in storage and previously retrieved, forming the Active Inventory (billed on invoices)
- **Destroyed** – Items that have undergone the OASIS Asset Destruction process
- **Permed Out** – Items retrieved by the client with no intention of returning to OASIS storage
- **No Find** – Items that were expected to be in storage but were not located in their last recorded scan location (may be due to mis-scans or incorrect data)

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Why Use the Item Status Filter?

- Helps **locate items quickly** based on their availability
- Ensures you **retrieve or update the correct inventory**
- Assists with **billing verification** (e.g., checking Active Inventory for invoice reconciliation)

7. **Run the Search**

- Click the **New Search** button to display results based on your selected criteria

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Understanding Search Results and Available Actions

When performing an **Advanced Inventory Search**, the results displayed on the screen provide an overview of the items that match the search criteria. Several additional actions are available to help users refine and manage their inventory effectively.

Search Results Overview

On the **left-hand side of the screen**, users will see a **summary of search results**, including filtering options:

1. **Item Results**
   - Click on **Showing Page Size** to adjust the number of results displayed per page
   - By default, the system shows **20 results per page**
2. **Status**
   - Users can filter results by item status:
     - **Send for Refile** – Items that can be returned to OASIS storage
     - **Request** – Items that can be retrieved and returned to the user
   - Some searches may display **one or both** of these options
3. **FBU (Functional Business Unit)**
   - The FBU represents the **region under which the account is managed**
   - Some users have access to multiple accounts across different regions
   - If a user **does not select a specific account**, the system returns results for **all accessible accounts**
   - Users can **toggle between regions** to view stored items by **checking/unchecking the FBU name**
4. **Customer**
   - If a **specific customer account** was selected, only results for that account will appear
   - If the **Customer field is set to "All"**, results could show items from multiple accounts
   - Users can **filter results by customer account** by selecting checkboxes beside the account names
5. **Department**
   - If a **specific department** was chosen during the search, only items scanned to that department will be displayed
   - If **multiple departments** were selected, users can **toggle between them** to refine search results
6. **Item Type**
   - Displays the **type of items** found in the search
   - If a user specified an **item type** during the search, only that item type will be shown
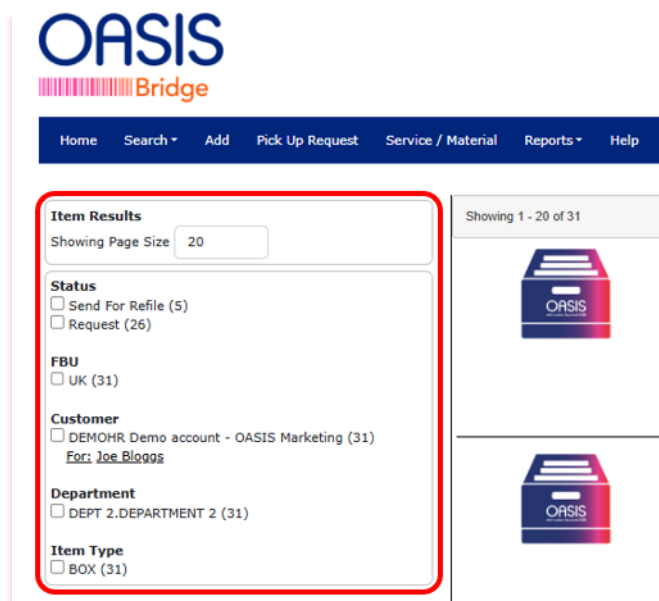
Why Are These Search Filters Useful?

- **Refine results quickly** without needing to rerun the search
- **Toggle between different regions, departments, or accounts** for a targeted view
- **Easily manage items** by filtering those available for retrieval or return

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Using the Enter Search Values Option

The **Advanced Inventory Search** in OASIS Bridge allows users to refine their searches by using the **Enter Search Values** feature. This method provides a more **targeted approach** to finding specific items, compared to the broader search options available.

How to Use Enter Search Values

1. **Access Advanced Inventory Search**
   - Navigate to the **Advanced Inventory Search** option
2. **Enter Specific Search Criteria**
   - Instead of using general filters, input **specific values** for fields like:
     - **OASIS Barcode**
     - **Customer Reference Number**
     - **File or Box Name**
     - **Creation Date or Last Accessed Date**
     - **Department Code**
     - **Item Type (Box, File, Document, Tape, etc.)**

3. **Use the Search Operator Dropdown**
   - Select the appropriate operator from the dropdown list:
     o **Equals (=)** – Searches for an exact match
     o **Greater than (>)** – Finds items with a **higher** value than the entered number (e.g., items created **after** a certain year)
     o **Less than (<)** – Finds items with a **lower** value than the entered number (e.g., items created **before** a certain year)
     o **Between** – Searches for a range of values (e.g., items created **between** 2015 and 2020)
     o **Contains** – Finds results **containing** the entered value (useful for partial references)

4. **Enter a Search Value**
   - Input the **reference number, barcode, or year** into the **Search Value** field
   - If using **Between**, enter two values (e.g., 2015 and 2020)

5. **Click Search**
   - The system will return results matching the applied filters

Example: Searching with "Contains" Operator

In this example, the user wants to search for an item using the **Internal Box Reference** field and the **Contains** operator.

1. **Select Internal Box Reference Field**

   - Click on the **search field dropdown** and choose **Internal Box Reference**

2. **Choose the "Contains" Operator**

   - From the **Search Operator Dropdown**, select **Contains**
   - This allows you to find any box references that **include** the entered value, even if other characters exist before or after it

3. **Enter the Search Value**

   - Type **BOX 17** into the **Search Value field**

4. **Click Search**

   - OASIS Bridge will scan all items within the **DEMOHR account** and return any records where the **Internal Box Reference** contains **BOX 17** as a full or partial match

Enter Search Values		
OASIS Barcode	Equals ⌄	Search Value
Internal Box Reference	Contains ⌄	BOX 17
Year	Equals ⌄	Search Value
Additional Information	Equals ⌄	Search Value
Location	Equals ⌄	Search Value
Add Date	Equals ⌄	
Destroy/Review Date	Equals ⌄	
Retention	Equals ⌄	Search Value
Indexed Notes	Equals ⌄	Search Value

5. **View the Search Results**

- If matches exist, the items will be displayed in the results table
- Users can take further actions, such as **sorting results, exporting data, or requesting items**

Key Benefits of the Operators
- Helps **find records even if the full reference is unknown**
- Works well with **partial matches**
- Useful for **broad searches** when an exact reference is not available

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Single Item Search

The **Single Item Search** option allows users to search for a specific item using its reference or barcode.

How to Access Single Item Search

- Click on **Search** in the top menu bar
- Select **Single Item Search** from the available options, or
- Click on the **Search icon** at the bottom of the OASIS Bridge home screen
- This will open the **Single Item Search** interface
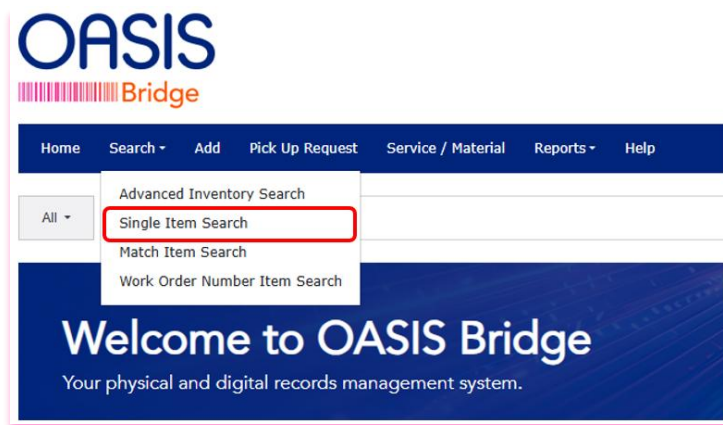
When using the **Single Item Search** option, the system provides several fields to help users narrow down their search. These fields allow for a more precise query when looking for specific items.

1. **Customer Account Selection:**
   - If you have access to multiple customer accounts, you can change the **Customer account** being searched
   - By default, the system will show the account you are currently working with
   - To switch to a different account, simply click the **Customer dropdown** and select the relevant account
2. **Department Selection:**
   - In addition to selecting a customer account, you can filter the search results by **Department**
   - You can either select a **single department** or **multiple departments** from the available list
   - If you are looking for items in several departments, use the **checkboxes** next to each department to select them

This allows users to easily narrow down their search to the relevant customer account and department(s), making it simpler to find the specific item they need.

Item Type Selection

1. **Item Type Dropdown:**
   - From the **Item Type** dropdown, you can choose the specific **type** of item you want to search for
   - By default, the system may show the **Box** item type, but you have the option to select a different type from the list, such as:
     - **File**
     - **Document**
     - **Tape**
2. **Selecting a Different Item Type:**
   - Click on the **Item Type dropdown** and select the relevant type you wish to search for
   - This allows you to narrow your search to items of a specific type, making it more efficient and focused

This option is particularly useful if you need to search for something other than the default item type (Box).

Item Field Selection

1. **Item Field Dropdown**
   - From the **Item Field** dropdown, you can choose the **reference field** you want to search on
   - By default, the system may display the **OASIS Barcode** field, but you can select a different reference field to search on if needed. The available fields include:
     - **OASIS Barcode**
     - **Internal Box Reference**
     - **Item Description**
     - **File Reference**
     - **Document Type**
2. **Selecting a Different Reference**
   - Click on the **Item Field dropdown** to see the list of available fields
   - Select the reference field you wish to search by, and the system will focus on that field for the search

This gives users flexibility in searching for items using different reference points, depending on what they know or need to find.

Searching for an Item Using the Item Field

1. **Enter the Search Value**
   - In the **Item Field Search Value** textbox, type the reference you wish to search for
   - If you're unsure of the exact reference, you can use the **%** sign as a wildcard operator. This allows for partial matches, either before or after the reference, or even in the middle
2. **Execute the Search**
   - After entering your reference or using the wildcard, click on the **Search** button to execute the query
   - The system will return all items that match the search criteria based on the reference field you selected

This will help users find items even if they only have partial information.

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Viewing Search Results

- **Search Results Display**
  - If any matches are found, the results will show a list of all items that match the reference entered in the **Item Field Search Value** textbox
  - The matches may include **exact** or **partial** matches depending on the value you entered and the use of the **%** wildcard operator
- **Next Steps**
  - Once the results are displayed, you can review the list of items, and further actions can be taken on the matched items (e.g., adding them to the cart, viewing item details, etc.)

Match Item Search

The **Match Item Search** function enables users to efficiently search for multiple barcoded items at once using either:

1. **Import File Option**
2. **Enter Search Values Option**

This feature is useful for users who need to order a bulk set of items either for **delivery** or **collection**. Rather than searching for each item individually, users can quickly import references from a CSV file or manually enter them into the text field.

Import File Option

- **Step 1:** Select **Match Item Search** from the search menu
- **Step 2:** Choose the **Import File** option
  - You can upload a **CSV file** containing the **barcodes or references** of the items you wish to search
  - Once uploaded, the system will search for those items based on the references listed in the file

Enter Search Values Option

- **Step 1:** Choose **Match Item Search**
- **Step 2:** Select the **Enter Search Values** option
  - This allows users to **manually enter** item references into a text field (separated by commas, spaces, or new lines)
  - Users can copy and paste a list of references into the search field, which will then be matched against the OASIS Bridge inventory

File Format Specifications

- **File Type:** CSV (Comma-Separated Values)
- **Column Format:** Ensure the file contains one reference per row with no additional columns
- **No Extra Spaces:** Make sure there are no extra spaces before or after the barcodes

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Match Item Search Using Import File

To perform a **Match Item Search** using the **Import File** option, follow these steps:

1. **Access Match Item Search**
   - Click on **Search** in the menu bar or the clickable **Search icon** at the bottom of the page
2. **Select Match Item Search**
   - From the dropdown menu, select the **Match Item Search** option
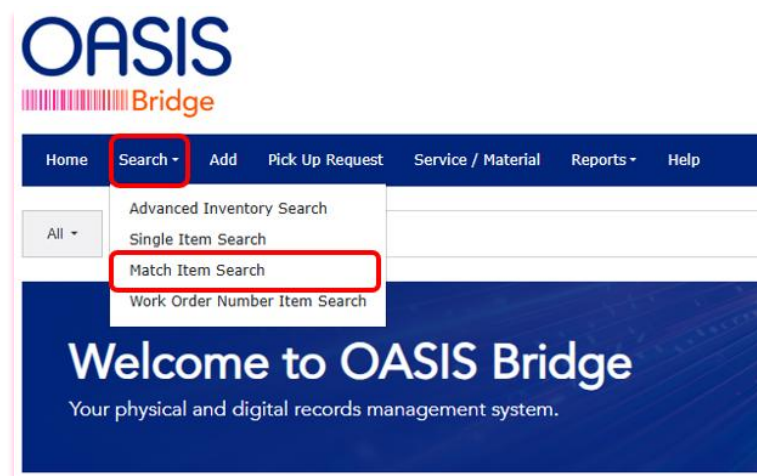
Match Item Search - Detailed Breakdown

1. **Match Item Search Criteria Section**
   - This section allows the user to narrow the search by selecting various criteria:
     - **Customer:** If you have access to multiple customer accounts, you can change the customer account you want to search by
     - **Department:** Select the department or multiple departments to narrow your search to a specific department
     - **Type:** Choose the type of item you want to search for (e.g., Box, File, Document, etc.)
     - **Search Fields:** Select the field you want to search against (e.g., OASIS Barcode, Internal Box Reference, etc.)

2. **Import File / Enter Search Values Section**
   - This section allows you to perform a search using two methods:
     - **Import File:** Upload a CSV file containing the references (OASIS Barcodes, etc.) of the items you want to search for. The CSV file will be processed to match the items in the system
     - **Enter Search Values:** Paste the references manually (or copy-paste from an Excel file or text document) into the provided field. You can add multiple values, each separated by a comma or line break

By configuring these criteria and choosing your search method, you can efficiently find the items you're looking for in bulk or one at a time.

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Match Item Search Example - Selecting Department

1. **Customer Selection:**
   - In this case, the user has selected the **DEMOHR** account from the **Customer** dropdown
2. **Department Selection:**
   - The user wants to search for items scanned specifically to **Dept2**
   - To do this, they will:
     - Click on the **Department** dropdown
     - Select **Dept2** from the available options

By selecting **Dept2,** the search will be narrowed to only include items associated with that department. This ensures that the results are more relevant and specific to the department of interest.

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3. **Item Type Selection:**

- The user is conducting the search for **Box** items
- To specify this, they will:
    - Click on the **Type** dropdown
    - Select **Box** from the available options

By selecting **Box,** the search will be narrowed to only include items categorized under this type. This ensures that the results focus solely on boxes within the selected department.

4. **Search Field Selection:**

- The user wants to match against the **OASIS Barcode**
- To do this, they will:
    o Click on the **Search Fields** dropdown
    o Select **OASIS Barcode** from the available options

By selecting **OASIS Barcode**, the system will use this reference field to match items. Keep in mind that the reference included in the import file must exactly match the OASIS Barcode for successful results. If there's any mismatch, no results will be found.
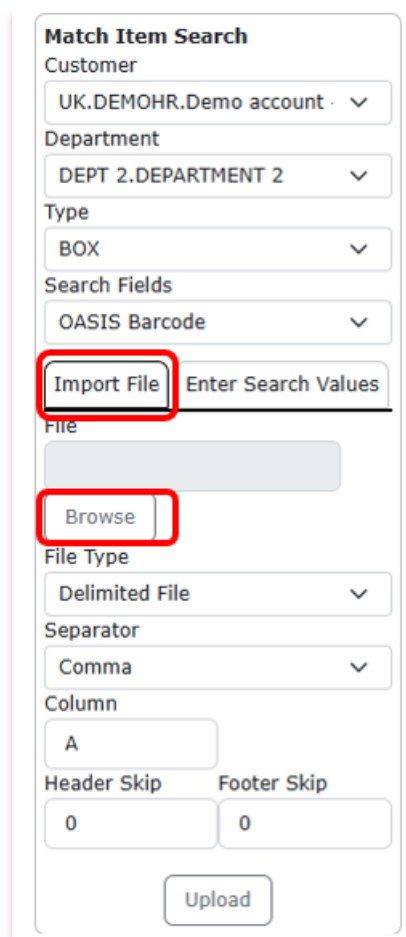
Note that the values in the dropdown will differ from client to client and those shown in the above example.

5. **Importing the File:**
    - The **Import File** option is already selected by default, so no changes are needed
    - To upload the file:
        - Click on **Browse**
        - Navigate to the location where your import file is saved (usually in CSV format)
        - Select the file and click **Open** to upload it

Once the file is uploaded, the system will begin processing the item references from the import file and match them based on the criteria you set earlier (e.g., OASIS Barcode).

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6. **Uploading the File:**
    - After you have located the file and are back on the **Import File** screen:
        - Click on **Upload** to submit the file for processing
    - OASIS Bridge will then run the import file against the inventory based on the **Match Item Search** criteria you have selected (e.g., Department, Item Type, and Search Fields)

The system will process the data and attempt to find any matching items based on the OASIS Barcode or the search field you have specified.

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7. **Viewing the Results:**

- If there are any matches found based on the imported file, the results will be displayed on the screen
- The search results will show a list of items that match the references you uploaded in the import file, according to the search criteria you have set (like Department, Item Type, and OASIS Barcode
- You can then proceed with further actions on the matched items, such as adding them to the cart, requesting delivery, or reviewing item details

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Search Results Overview

- On the left-hand side of the screen, below the import file option, you will find an overview of the search results. This overview breaks down the results by various categories:
  - **Status:** Shows the status of the items (e.g., In, Out, Destroyed, etc.)
  - **FBU (Functional Business Unit):** The region the items are under
  - **Customer:** The account code and name of the customer related to the items
  - **Department:** The department the items are scanned to
  - **Item Type:** The type of items found (e.g., Box, File, Document)

Filtering Results

- You can filter the search results by clicking on the checkbox next to each of these categories
- This will refine the search results to only show the items that match the selected filters (e.g., selecting a specific FBU or Department)

By using these filtering options, you can narrow down the results to better meet your needs and focus on the relevant items.

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8. **Item Global Actions:**

- From the item actions located above the search results, you will see the option for **Item Global Actions**.
- Clicking on **Item Global Actions** may present you with one or two additional options, depending on the status of the matched items.

Request from OASIS

- If you want to order all items to be returned to the client site (i.e., items currently in OASIS storage), click on **Request From Off Site**. This action will add the items to your cart for delivery to your site.

Send to OASIS

- If you wish to order all items to be sent back to OASIS storage (i.e., items that are currently on your site but need to be collected), click on **Send to Off Site**. This action will add the items to your cart for collection and return to OASIS storage.

These **Item Global Actions** allow for bulk actions, so you can efficiently manage multiple items at once, either for delivery or collection.

9. **Cart Update:**

- Once you have selected the relevant option from the **Item Global Actions** (either **Request from OASIS** or **Send to Off Site**), the cart will automatically update to reflect the selected items
- In the example, thirty-one items were matched from the import file. The user chose to order boxes for delivery, but only thirteen boxes were available to be ordered for delivery as some boxes are already retrieved or on existing work orders for delivery
- These thirteen boxes are now added to the cart, and you can proceed to complete the order

This feature helps streamline the ordering process by allowing users to manage bulk orders and view the number of items available for delivery or collection instantly.

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10. Complete the Order:

- After reviewing the items in the cart, and ensuring everything is correct, click on **Send Order** to finalize the order
- This will allow you to complete the order details, such as delivery or collection instructions, and submit the request to OASIS for processing
- Once submitted, OASIS will act on the order based on your request, whether it is delivery to your site or collection from your site

This step finalizes the process and ensures that the requested items are managed promptly.

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Match Item Search using Enter Search Values

This approach provides a quick and efficient way to run bulk searches based on a list of values, similar to the import method but without the need to upload a file.

To run a **Match Item Search** based on values:

1. Follow the steps for **Match Item Search** as you would for the **Import File** option (i.e., choose the **Customer**, **Department**, **Type**, and **Search Fields**)
2. **Click** the **Enter Search Values** button, which is located to the right of the **Import File** option
3. **Paste** the values you want to match into the **Search Field Values** textbox
   - For example, if you are matching against **OASIS Barcode**, copy the barcode references from your source and paste them directly into the textbox
   - There is no need to separate the values with commas; simply ensure each value is on a separate line

4. Once all values are entered, **click Search** to execute the search

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If there are matches found, the system will display the results on screen.

- The results will show all items that match the pasted values based on the search criteria you selected earlier (Customer, Department, Type, and Search Fields)
- On the left-hand side of the screen, you will see a breakdown of the search results, such as:
    - **Item Status**: This shows the status of the items (e.g., In, Out, Destroyed)
    - **FBU (Functional Business Unit)**: The region or account under which the items are stored
    - **Customer**: The account code and account name associated with the items
    - **Department**: The department to which the items belong
    - **Item Type**: The type of items that were matched (e.g., Box, File, Document, Tape)

You can filter the results by clicking on the checkboxes next to each option.

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Once you click on **Item Global Actions**, you may see one or two additional options depending on the status of the matched items.

- If you want to order all items to be returned to the client site, choose the **Request from OASIS** option
- If you wish to order all items to be sent to your site, you can click **Request From Off Site**. This will initiate the order process for the items to be delivered to the client site

After selecting the appropriate option, the system will update the cart with the items, ready for further action.
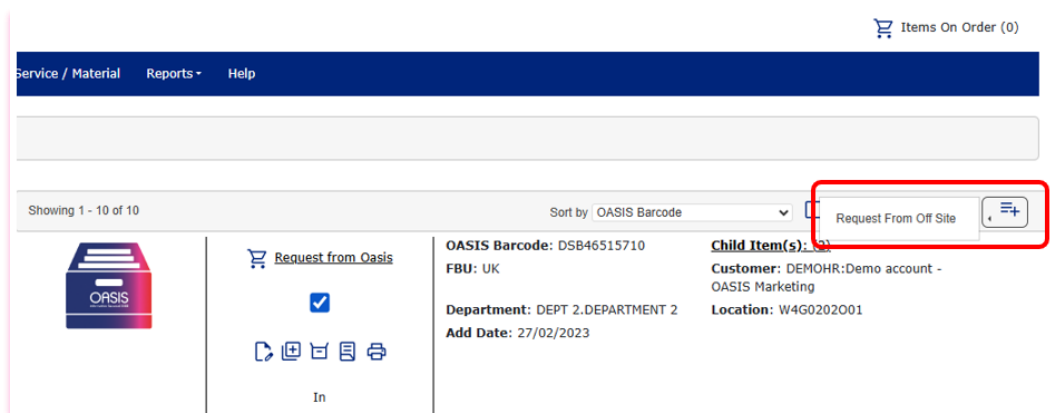
- Once you have selected the relevant option, such as **Request From Off Site**, the system will update the cart and display the number of items that can be ordered for delivery or collection
- For example, if the import file has ten items matched and you choose to order boxes for delivery, all 10 items (boxes) that are available will be added to the cart
- The cart will reflect these ten items, ready for the next step in the order process. You can review the items in the cart and proceed with the order when ready

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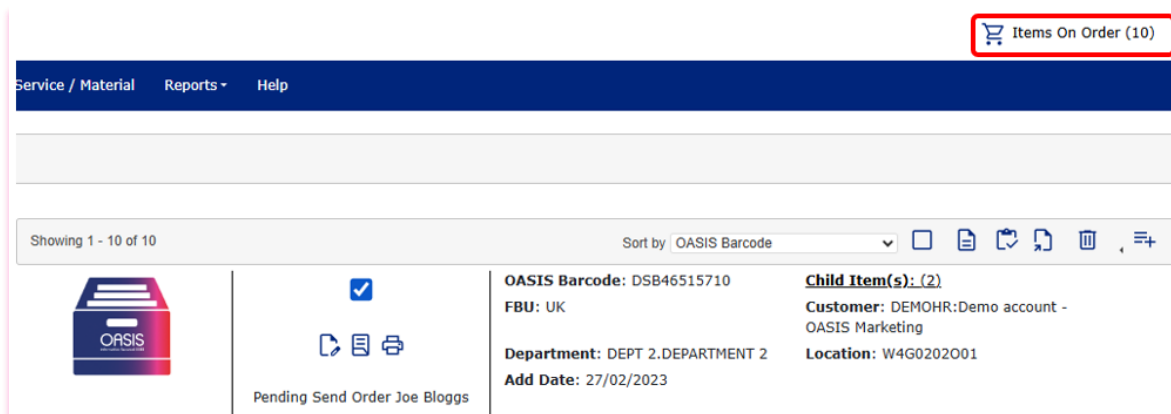
- After reviewing the items in the cart, click on **Send Order** to complete the order details. This will submit the request to OASIS for action
- Once the order is sent, OASIS will process the request and take the necessary actions, such as delivering the requested items or arranging for their collection

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Work Order Number Item Search

This feature allows users to search for specific work orders and view the items associated with them, such as items requested for delivery or collection, scan requests, or additional services like flatpack boxes or shredding.

To access the **Work Order Number Item Search** option, follow these steps:

- **Click on Search** from the menu bar or click the **Search icon** at the bottom of the page
- Once the search options appear, select **Work Order Number Item Search** from the available options

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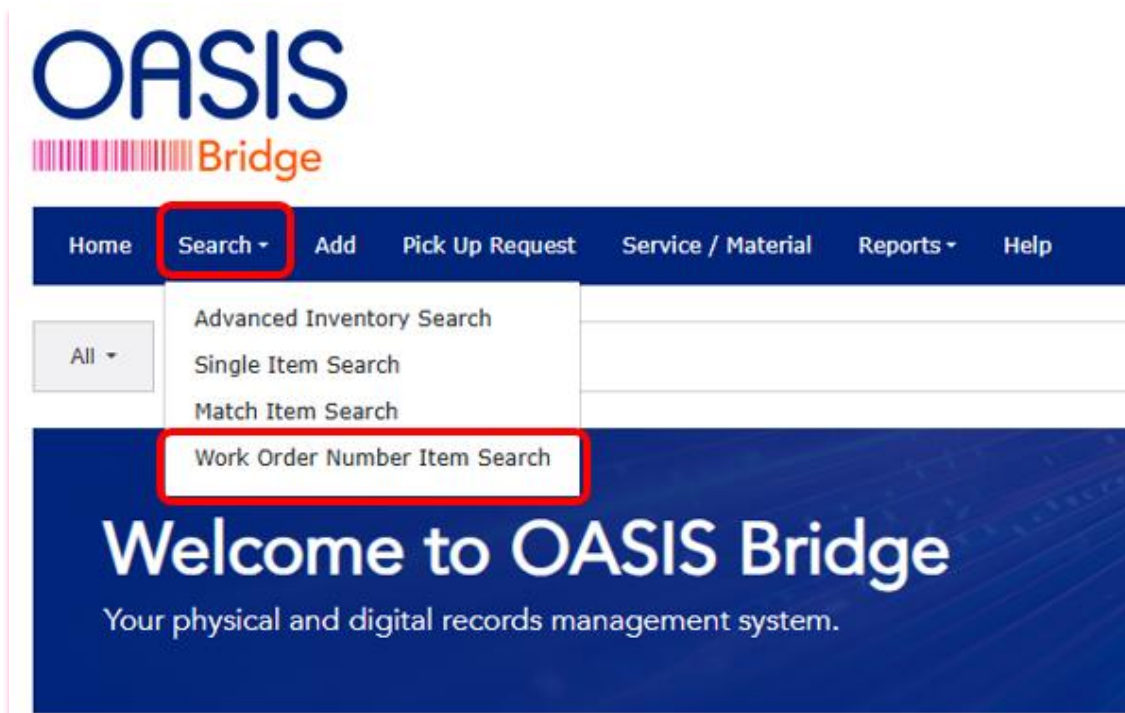
When using the **Work Order Number Item Search**, follow these guidelines:

1. **Enter the exact work order number** in the search field
2. **Note**: The **% sign wildcard operator** will not work for searching work order numbers, so entering a partial number with the wildcard will yield **zero results**

Ensure the work order number is entered correctly to retrieve the associated items or services related to that work order.

3. **Click Search** to run the query

This will retrieve the items or services associated with that specific work order number.

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If the query is successful

- The results will display, showing the items associated with the work order number
- In the example below, you will see the work order **B146460** created by user **Joe Bloggs**, which includes one item, a box that is marked for retrieval and return to the site (status: **Retrieved**)

This will allow you to view all the details related to that specific work order.

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Inventory Reports

There are several ways to extract an inventory report from OASIS Bridge. As a user, you will know what information you are looking for in advance of creating the report, such as running inventory based on a specific department or item type, running a partial inventory on items that are being charged storage on your billing cycle or running a full inventory on items regardless of their current status.

The guidelines below will support you in extracting the inventory in several ways, including running an Advanced Item Search and exporting the inventory to PDF or Excel and also running an inventory report through the General Reporting section.

Advanced Inventory Search

- From the home screen, **click Search** on the menu bar or the clickable icon at the bottom of the screen
- Complete the reference fields if you need to narrow your inventory down by department
- In the example below, an inventory that can be exported will include only items that are scanned to *Department* Dept2, are of Box item *Type* and have a current *Item Status* of In/Out
- We recommended splitting inventory reports by department or other logical segments to improve efficiency. Performing an inventory search on all items with all status set as **All** will result in longer search times
- Click on the **New Search** button at the bottom to execute the query

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- When the query is completed, OASIS Bridge will show all the results based on the criteria selected previously
- Highlighted areas show the total number of results, *Showing 1 - 20 of 31*, and the report options to select what format to export the inventory to using the Inventory Report or Excel Report options

Inventory Export Report

You can generate a quick inventory report from the results that are on screen. OASIS Bridge will enable the user to export the inventory to different formats, including PDF (Default format) and Excel.

- To generate the inventory report, **click on the Inventory report** icon

- Select the **Report Type** dropdown and choose the relevant file format to report on

- **Click Print** and the report will open in a separate browser tab

- The Inventory Export will display similar to the extract seen below

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Excel Export Report

Clicking on the Excel Report will download the results into an Excel file. This will be accessible from your downloads folder if it does not open automatically.

- When you open the file, the filter within Excel is automatically applied

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How to Create Web Orders

Creating an Itemised Delivery Web Order

Here are the guidelines for submitting a web order for the delivery of an item back to the client's site. Itemised deliveries refer to items that are already barcoded and currently stored in an OASIS record centre.

1. Start by searching for the item you want to order
   - In this example, the user is ordering a box using the **OASIS barcode**
   - Enter the box barcode reference into the search bar and **click the Search** button or press **Enter** on your keyboard. (For more information on searching for items, refer to the section on Searching Items.)
2. The search results will display both a file and a box. The file appears in the results because it is a child item of the box (Parent Item Code)
3. To order the box, click on the "**Request from OASIS**" link next to the box icon

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- When you click the "**Request from OASIS**" link, the item is updated and added to the cart
- You will notice that the item's status changes from "**In**" to "**Pending Send Order**" for Joe Bloggs
- This status update occurs because the item has been added to the cart for ordering, and the user requesting the box is Joe Bloggs

4. To continue with the order request, click the **Send Order** button

Complete your order

The **Complete Send Order** dialogue box will open, allowing you to fill in the order details

1. The **Delivery Address** will be automatically populated using the default address set at the account level
   - The **Delivery Address** is used for deliveries, collections, and scan requests made through **OASIS Bridge**. This is the service address where you want the order to be fulfilled
   - You can change the address by clicking on the **Default Delivery Address** and selecting an alternative service address from the dropdown
   - Please note that not all clients will have additional site addresses available to choose from

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2. The **Delivery Priority** will default to the standard service specified in your **Service Level Agreement** with OASIS.
   - In the example provided, the **DEMOHR** client has the **Next Day** service option for deliveries, collections of assets, supplies/materials, and shredding requests
   - Other available options on this account include **Detail Indexing** (explained in the **Add Item** section), **Scanback** and **Scan on Demand** (explained in the **Scan on Demand** section), as well as a **SCHEDULED** service option
   - The **SCHEDULED** service allows clients to select an alternate service day, but this is only available if configured at the account level, so not all users may have it as a default option

3. The **Customer Order Reference** field is available if you are required to record a Purchase Order number or an internal order reference
   - By default, this is optional and can be left blank if not required

4. If you want to associate the work order with a department, click on **Change to Department** and select the appropriate one from the dropdown menu

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5. The **Comments** text field is available for you to provide any information that may be useful for OASIS before the order is fulfilled
   - Helpful details might include office opening or closing times, availability of onsite parking, security protocols upon arrival, whether there is an elevator (and if it's out of order), or if your office is not on the ground floor
   - Providing this information helps our drivers and operations teams plan and schedule deliveries and collections more efficiently

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6. Submit your order:

- When you click **Send**, OASIS Bridge will submit the order through the system and generate a preview of the work order as your confirmation of successful submission
- You can scroll down to view all the work order details if there are multiple lines, but in this example, there is only one work order line for the item for delivery
- The highlighted options on the right will allow you to print or download a copy of the order for your records

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Creating an Itemised Collection Web Order

The following guidelines will explain how to submit a web order for the collection of a barcoded item from the client site. Itemised collections refer to items that are already barcoded, have been stored in an OASIS record centre, and have been previously recalled to the client site by an authorised person.

1. Start by searching for the item you need to send back to OASIS.
   - In this example, the user performed an advanced search for all items with an **Out** status (for more details on **Advanced Item Search**, refer to the section on Searching Items). Alternatively, you can use the search bar to find the item.
   - The search results show several boxes with an **Out** status.
   - OASIS Bridge will display the status, indicating that the item was **Retrieved by Test user 5 on 14/02/2025**. This provides information about the status (Retrieved), who last ordered the box (**Test user 5**), and when it was last ordered or delivered (14/02/2025).
2. To send the box, click the **Send to OASIS** link next to the box icon.

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- When you click on the **Send to OASIS** link, the item is updated and added to the cart
- The item status changes from **In** to **Pending Send Order for Joe Bloggs**
- This status update occurs because the item has been placed in the cart for ordering, and the user requesting the box is **Joe Bloggs**

- The item status now shows **Refile for Joe Bloggs** indicating that **Joe Bloggs** has requested a collection of the item
- To continue with the order request, click the **Send Order** button

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Complete your order

The **Complete Send Order** dialogue box will open, allowing you to fill in the order details

3. The **Delivery Address** will be automatically populated using the default address set at the account level
   - The **Delivery Address** is used for deliveries, collections, and scan requests made through **OASIS Bridge**. This is the service address where you want the order to be fulfilled
   - You can change the address by clicking on the **Default Delivery Address** and selecting an alternative service address from the dropdown
   - Please note that not all clients will have additional site addresses available to choose from

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4. The **Delivery Priority** will default to the standard service specified in your **Service Level Agreement** with OASIS.
   - In the example provided, the **DEMOHR** client has the **Next Day** service option for deliveries, collections of assets, supplies/materials, and shredding requests
   - Other available options on this account include **Detail Indexing** (explained in the **Add Item** section), **Scanback** and **Scan on Demand** (explained in the **Scan Request** section), as well as a **SCHEDULED** service option
   - The **SCHEDULED** service allows clients to select an alternate service day, but this is only available if configured at the account level, so not all users may have it as a default option

5. The **Customer Order Reference** field is available if you are required to record a Purchase Order number or an internal order reference
   - By default, this is optional and can be left blank if not required

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6. If you want to associate the work order with a department, click on **Change to Department** and select the appropriate one from the dropdown menu

7. The **Comments** text field is available for you to provide any information that may be useful for OASIS before the order is fulfilled
    - Helpful details might include office opening or closing times, availability of onsite parking, security protocols upon arrival, whether there is an elevator (and if it's out of order), or if your office is not on the ground floor
    - Providing this information helps our drivers and operations teams plan and schedule deliveries and collections more efficiently

8. Submit your order:

- When you click **Send**, OASIS Bridge will submit the order through the system and generate a preview of the work order as your confirmation of successful submission
- You can scroll down to view all the work order details if there are multiple lines, but in this example, there is only one work order line for the item for collection
- The highlighted options on the right will allow you to print or download a copy of the order for your records

Creating a Supplies Web Order

Occasionally, you may need to order supplies from OASIS, such as flatpack boxes, barcode labels, destruction sacks, or security seals for your boxes. Depending on your account setup, these supplies may be available for order through OASIS Bridge.

This section will cover the listed supplies, with an example demonstrating how to order flatpack boxes.

1. To get started, select **Service/Material** from the menu bar or click on the corresponding icon at the bottom of the page

2. The **Service/Material** dialogue box will appear

3. If you have access to multiple accounts and need to place an order for a different customer, click the **Customer** dropdown and select the appropriate account. Otherwise OASIS Bridge will default to the account you selected at login

4. To specify a department for the order, click the **Department** dropdown. If your account does not have any departments set up, you can leave this field blank

5. The **Requested For** field will default to the user currently logged into OASIS Bridge
   - However, if the order is for someone else, you can override this by clicking the **Requested For** link
   - When the **Requested For** dialogue box opens, it will list all authorised contacts associated with the account
   - If the relevant user is listed, select their name and click **Select** at the bottom to proceed

6. Use the **Service/Material** dropdown to select the supplies you want to order
   - Keep in mind that available options may vary by client. Some clients may have more or fewer options than those shown in the example below
   - In this example, the user selects standard-size flatpack boxes, identified by the service code and description **SL-STND - OASIS Standard Box Supply (Each)**
   - **Click** the item in the list to select it
   - Note, that while the description of supplies/materials may vary between clients, the actual item remains the same

7. Enter the **Quantity** that you wish to order. Flatpack boxes are sold in packs of 10, so you must order in multiples of 10, regardless of the exact number of boxes you need
   - For example, if you require only 8 flatpack boxes, you will still need to order 10, as packs cannot be split, and the quantity refers to individual boxes, not pack size
8. The **Comments** text field is available if you want to add a note to clarify your order, but it is optional and not required
9. To proceed with your order, **click Save**, then **Close**

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- After clicking **Close**, the **Items on Order** cart will update, reflecting the addition of 1 item
- The screen will display a summary of the items added to the cart
- To finalise the order request, **click Send Order**

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Complete your order

The **Complete Send Order** dialogue box will open, allowing you to fill in the order details

1. The **Delivery Address** will be automatically populated using the default address set at the account level
   - The **Delivery Address** is used for deliveries, collections, and scan requests made through **OASIS Bridge**. This is the service address where you want the order to be fulfilled
   - You can change the address by clicking on the **Default Delivery Address** and selecting an alternative service address from the dropdown
   - Please note that not all clients will have additional site addresses available to choose from

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2. The **Delivery Priority** will default to the standard service specified in your **Service Level Agreement** with OASIS.
   - In the example provided, the **DEMOHR** client has the **Next Day** service option for deliveries, collections of assets, supplies/materials, and shredding requests
   - Other available options on this account include **Detail Indexing** (explained in the **Add Item** section), **Scanback** and **Scan on Demand** (explained in the **Scan Request** section), as well as a **SCHEDULED** service option
   - The **SCHEDULED** service allows clients to select an alternate service day, but this is only available if configured at the account level, so not all users may have it as a default option

3. The **Customer Order Reference** field is available if you are required to record a Purchase Order number or an internal order reference
   - By default, this is optional and can be left blank if not required

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4. If you want to associate the work order with a department, click on **Change to Department** and select the appropriate one from the dropdown menu

5. The **Comments** text field is available for you to provide any information that may be useful for OASIS before the order is fulfilled
   - Helpful details might include office opening or closing times, availability of onsite parking, security protocols upon arrival, whether there is an elevator (and if it's out of order), or if your office is not on the ground floor
   - Providing this information helps our drivers and operations teams plan and schedule deliveries and collections more efficiently

6. Submit your order

- When you click **Send**, OASIS Bridge will submit the order through the system and generate a preview of the work order as your confirmation of successful submission
- You can scroll down to view all the work order details if there are multiple lines, but in this example, there is only one work order line for the supplies
- The highlighted options on the right will allow you to print or download a copy of the order for your records

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Creating a Shredding Web Order

When you need to order supplies from OASIS, such as **flatpack boxes**, **barcode labels**, **destruction sacks**, or **security seals**, you can submit a request through the **OASIS Bridge** portal.

Additionally, if you require a service to collect **destruction sacks** or to empty any **confidential waste consoles** or **wheelie bins**, you may be able to submit a request for collection through the portal as well.

Important

A shredding web order is created for the collection of confidential waste and not for the physical destruction of assets, such as files, boxes of media. Physical asset destruction requests should be emailed directly to your local support team.

Health & Safety Notice

A reminder note is displayed on the **OASIS Bridge portal home page** to remind all clients about safety protocols before sending containers like **destruction sacks**, **boxes**, and **media boxes** for collection.

To ensure the safety of our team members when handling your records, please ensure that any containers we are collecting from you do not exceed 15kg per container. This includes boxes, shredding sacks, media boxes and transit containers. Any container above this weight is subject to refusal by our team.

This section will explain the confidential waste service mentioned earlier and provide an example of how to submit an order for the collection of confidential waste.

1. To start, click on **Service/Material** in the menu bar or select the clickable icon at the bottom of the page
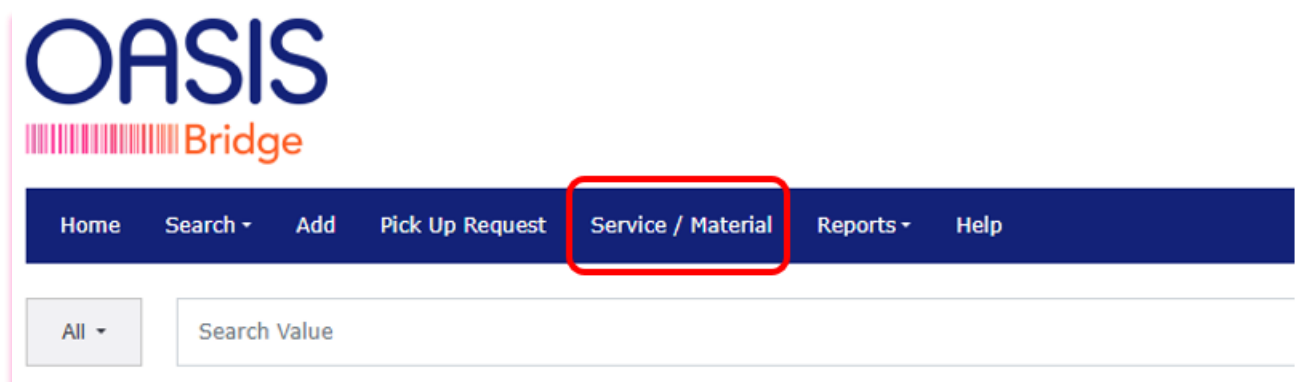
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- The **Service/Material** dialogue box will pop up

2. If you have access to multiple accounts and need to place an order for a different customer, click the **Customer** dropdown and choose the relevant account. Otherwise, **OASIS Bridge** will default to the account you selected during login
3. To select a specific department for the order, click the **Department** dropdown. If your account does not have any departments set up, you can leave this field blank

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4. In the **Service/Material** dropdown, select the **SR-SHRED** shredding service option for the collection of destruction sacks or to service any confidential waste consoles or 120-litre wheelie bins you may have
   - In this example, the user requires two confidential waste consoles to be emptied
   - **Click SR-SHRED - Service - Destruction Console/Sack** option from the dropdown

- Enter the **Quantity** of destruction sacks, consoles or wheelie bins that need to be serviced or collected
  - For example, if you need 2 confidential waste consoles serviced, then enter the 2 in the **Quantity** field
- The **Comments** text field is there if you'd like to add a note to clarify your order, but it is optional and not mandatory
  - In this example, the user clarifies the number of confidential waste consoles that need to be emptied.
- To proceed with your order, **click Save** and then **Close**

- When you click **Close,** you will notice that the **Items on Order** cart has been updated with 1 item added
- The screen will show a summary of the items currently in the cart
8. To continue with the order request, **click Send Order**

Complete your order

The **Complete Send Order** dialogue box will open, allowing you to fill in the order details

7. The **Delivery Address** will be automatically populated using the default address set at the account level
   - The **Delivery Address** is used for deliveries, collections, and scan requests made through **OASIS Bridge**. This is the service address where you want the order to be fulfilled
   - You can change the address by clicking on the **Default Delivery Address** and selecting an alternative service address from the dropdown
   - Please note that not all clients will have additional site addresses available to choose from

8. The **Delivery Priority** will default to the standard service specified in your **Service Level Agreement** with OASIS.
   - In the example provided, the **DEMOHR** client has the **Next Day** service option for deliveries, collections of assets, supplies/materials, and shredding requests
   - Other available options on this account include **Detail Indexing** (explained in the **Add Item** section), **Scanback** and **Scan on Demand** (explained in the **Scan Request** section), as well as a **SCHEDULED** service option
   - The **SCHEDULED** service allows clients to select an alternate service day, but this is only available if configured at the account level, so not all users may have it as a default option

9. The **Customer Order Reference** field is available if you are required to record a Purchase Order number or an internal order reference
   - By default, this is optional and can be left blank if not required

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10. If you want to associate the work order with a department, click on **Change to Department** and select the appropriate one from the dropdown menu

11. The **Comments** text field is available for you to provide any information that may be useful for OASIS before the order is fulfilled
   - Helpful details might include office opening or closing times, availability of onsite parking, security protocols upon arrival, whether there is an elevator (and if it's out of order), or if your office is not on the ground floor
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12. Submit your order

- When you click **Send**, OASIS Bridge will submit the order through the system and generate a preview of the work order as your confirmation of successful submission
- You can scroll down to view all the work order details if there are multiple lines, but in this example, there is only one work order line for the supplies
- The highlighted options on the right will allow you to print or download a copy of the order for your records

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Creating a Scan On Demand Web Order

The **Scan on Demand** service allows you to request the scanning of specific documents that are stored in the facility, enabling you to receive digital copies as quickly as possible (same-day or next-day delivery depending on the urgency).

This process allows for fast access to important documents, with the flexibility to request scanning based on your immediate needs.

Here is a breakdown of how to create a scan-on-demand web order for scanning documents stored in a facility.

1. **Search for the Document**

   - Start by searching for the document that needs to be scanned. In this case, the user knows the **Employee ID** and types it into the **search bar**
   - After entering the Employee ID (or other relevant information), click the **Search** button next to the search bar or press **Enter** on your keyboard

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2. **System Search for Employee ID**

- The system will search through all **Employee ID fields** for a match to the **FM001** ID that you entered
- If the system finds more than one file with the same Employee ID (as in this example, two files match), you will be presented with both results
- Review the search results to determine which of the two files is the one you need

At this point, you can proceed with the rest of the order process (such as confirming the delivery method and finalizing the request).

3. **Add to Order Cart**

- Once you have identified the correct file, click on **Request from OASIS** next to the file you need
- This action will add the selected file to your **Items on Order** cart, confirming your request for scanning
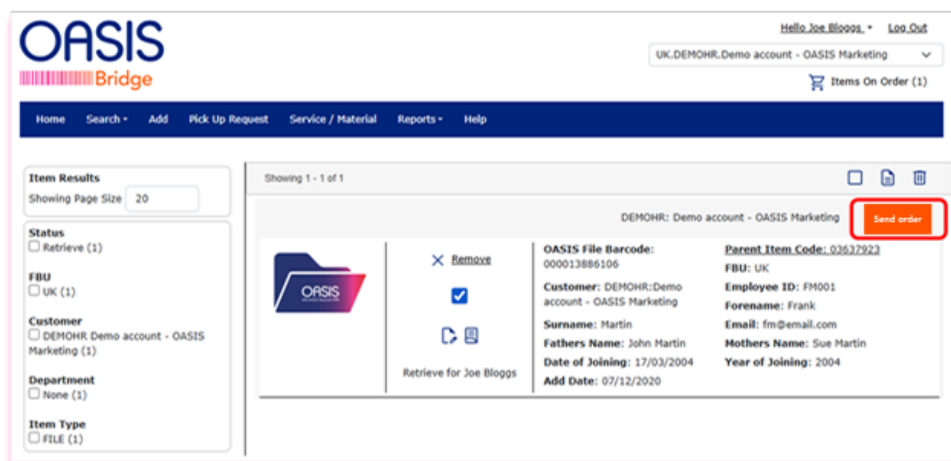
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4. Click Send Order

- Once you are satisfied with the order, click on the **Send Order** button to proceed

Here is the next step in the process after clicking **Send Order**:

1. Complete Send Order Dialogue Box

- Once you click **Send Order**, the **Complete Send Order dialogue box** will open, where you can review and adjust details before finalizing the order
- In this example, we will leave the address as the **default address** since the document is not physically being delivered. It is being uploaded digitally
- Since the item is being uploaded as a digital image to access on **OASIS Bridge**, the address will not affect the work order. The file will be available for access on the platform, not sent to a physical location

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2. **Update Delivery Priority**

- In the **Complete Send Order dialogue box**, you will need to adjust the delivery priority.
- If the default option is set to **Next Day** (or another default priority on your account), you will need to change it to **Scan on Demand**.

3. **Select Scan on Demand**

- Click on the **dropdown** next to the delivery priority field.
- From the list of options, select **Scan on Demand** to indicate that the document should be processed and uploaded as quickly as possible (same-day or as agreed upon)
- After selecting **Scan on Demand**, the system will prioritize your order for quicker scanning and digital delivery.

This ensures that your request is managed with the required urgency and the document will be ready for you to access on **OASIS Bridge** in the specified time.

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4. **Customer Order Reference**

- The **Customer Order Reference** field is where you can record a **purchase order reference** or an **internal reference** for the order
- In this example, the user enters **SCAN24.02-01** as the reference for tracking or internal purposes
- This field is optional but useful for record-keeping or auditing

5. **Update Department (Optional)**

- If needed, you can also specify the **department** associated with this order
- To do this, click on the **Department dropdown** and choose the relevant department from the list (e.g., HR, Finance, etc.)
- This ensures the order is linked to the correct department if your organization uses departmental tracking

6. Complete Other Required Information

- If any additional fields need to be filled out, such as **Comments**, enter the necessary information
- Comments could include special instructions, details about the document, or any other relevant notes

7. Submit the Web Order

- Once all the required fields are completed, click on the **Send** button to submit the web order request
- This will send the order to the scanning team, who will process it according to your specifications (Scan on Demand priority)

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8. **Confirmation**

- After submission, you should receive a confirmation that your web order has been successfully processed and is now in progress.

Viewing Scanned Images

1. Use the **search bar** to check if the document has been uploaded
   - When you submit your **Scan on Demand** request, you will receive a confirmation once the document is available for preview, along with the **document barcode**
2. Enter the **document barcode** into the search bar
3. Click on **Search** on the right-hand side or press **Enter** on your keyboard to locate the document
   - If a matching document is located, it will appear in the search results
   - Look for the **two highlighted View Image icons** in the results
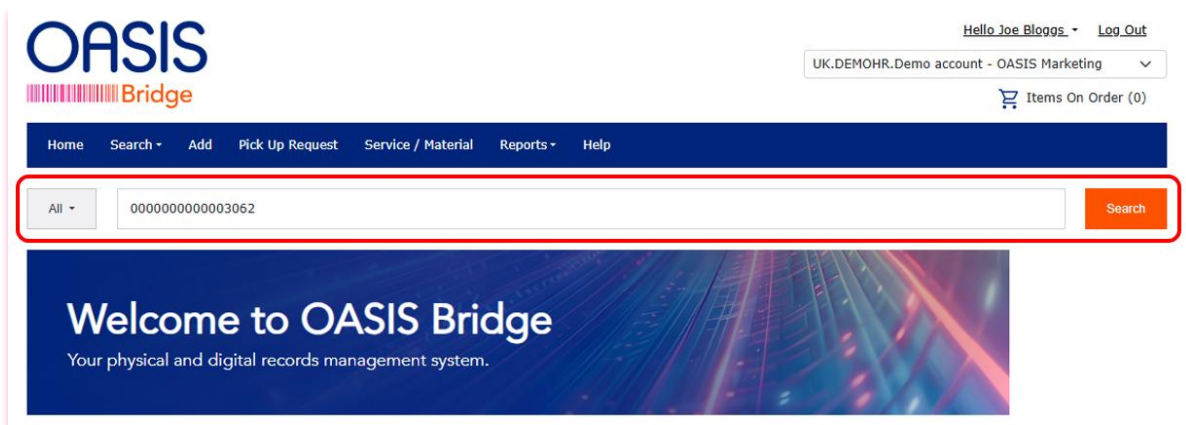
4. Click either **View Image** icon to open the **View Image** dialogue box and preview the document

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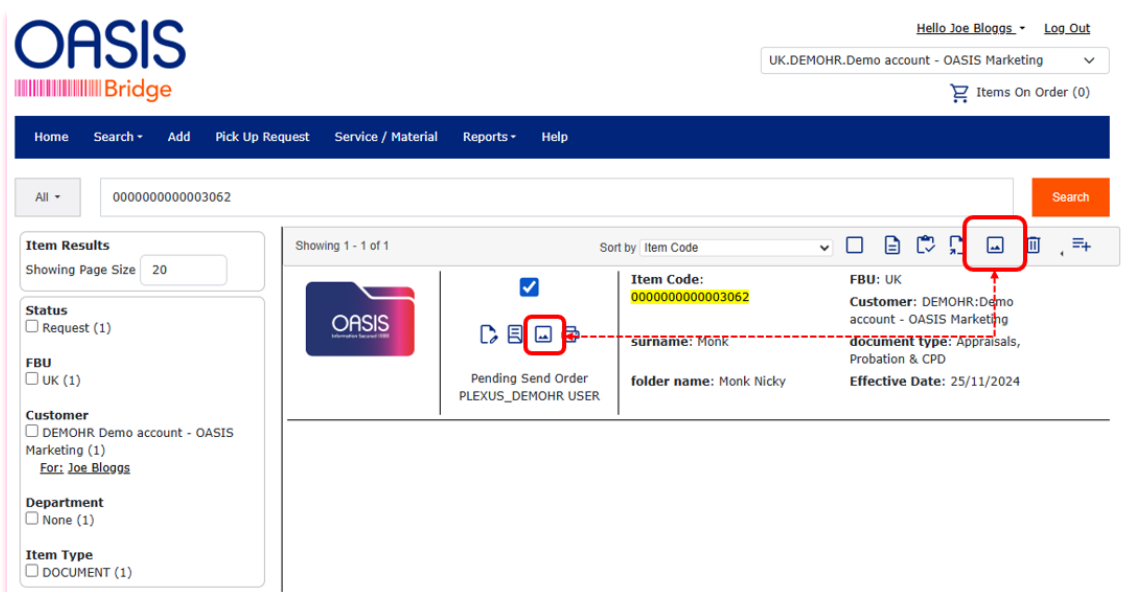
5. The **View Image** option will display the file in its uploaded format, typically as a **PDF**
6. The available options include:

- **View Selected** – Preview the document
- **Zip Selected** – Download the document as a compressed file
- **Download Selected** – Download the document as a **PDF**
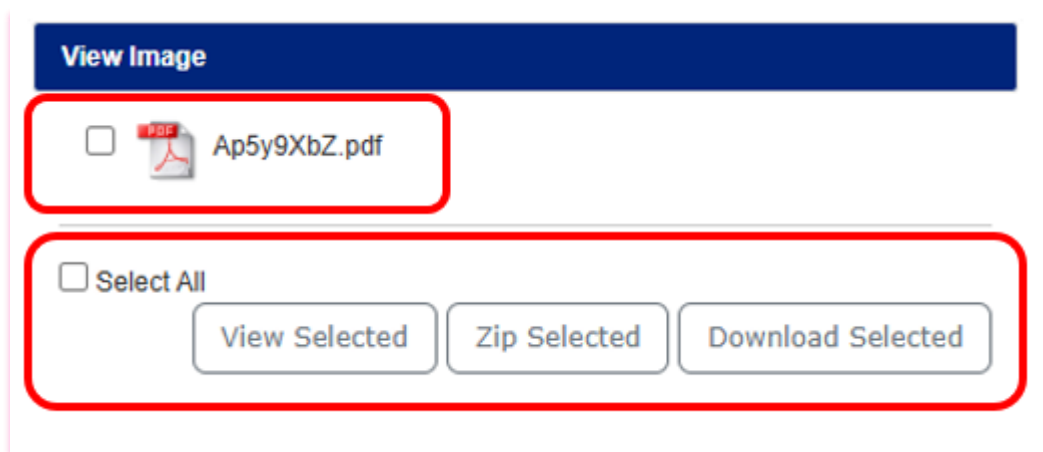
7. **Select the Image:**

- Look for a checkbox next to the image you want to select
- Click on the checkbox to select the image

8. **Preview the Image:**

- After selecting the image, **Click View Selected**

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9. **View Selected Dialogue Box:**
   - Once you click on "View Selected," a dialogue box will open, displaying the preview of the document or image

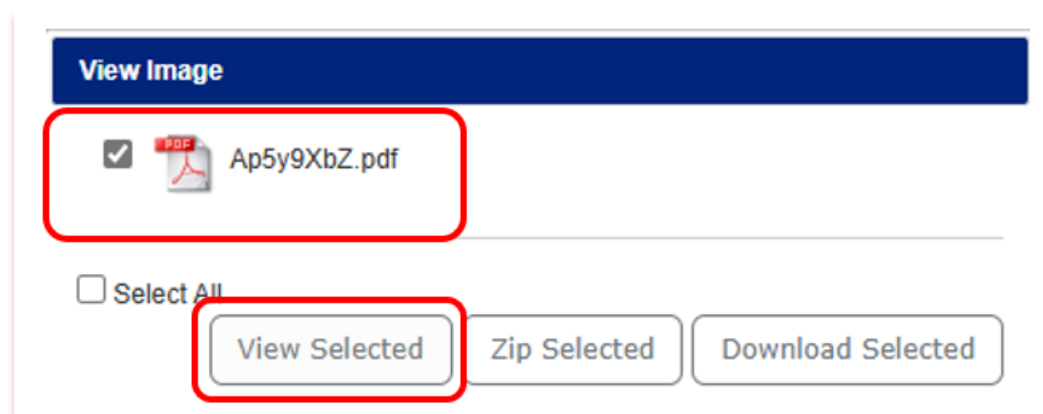10. **Navigate Through Pages:**
    - If it is a multi-page document, use the navigation tools at the top of the dialogue box to scroll through the scanned pages. These might be buttons like "Next," "Previous," or page numbers

11. **Print or Save the Image:**
    - You can choose to either print the document directly from the preview by clicking the **Print** option
    - Alternatively, you can save the image to your printer or machine by selecting **Save** or **Download**

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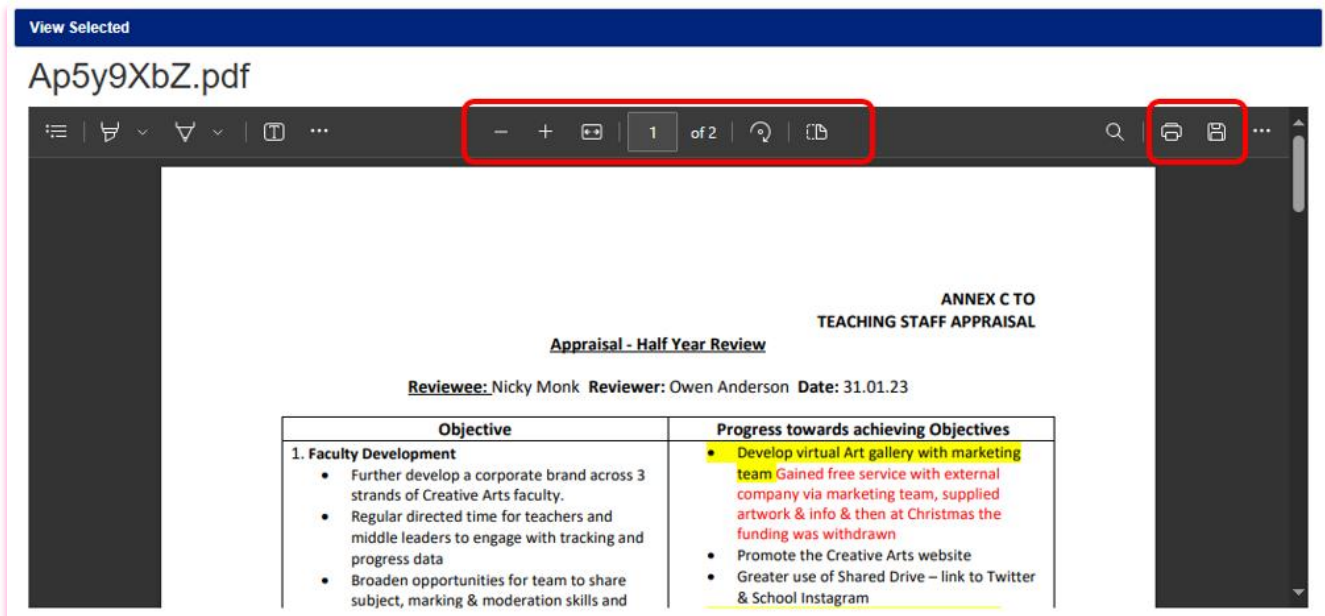
Downloading Scanned Images

1. **Zip Selected**
   o If you choose this option, the document (or selected images) will be downloaded as a **compressed ZIP file**. This is helpful if there are multiple files or pages, as it bundles them together into one file that you can extract later
2. **Download Selected**
   o Choosing this option will download the document as a **PDF file**. This is a viable choice if you want a standard, easy-to-view document format that can be opened on most devices

Just select the option that fits your needs, and you will be able to download the document in your preferred format.

Pick Up Request

The **Pick Up Request** feature in OASIS Bridge allows users to request the collection of items from storage without having to provide specific barcodes for each item. This is particularly useful when new items have been added to inventory over time, and you wish to collect all items at once.
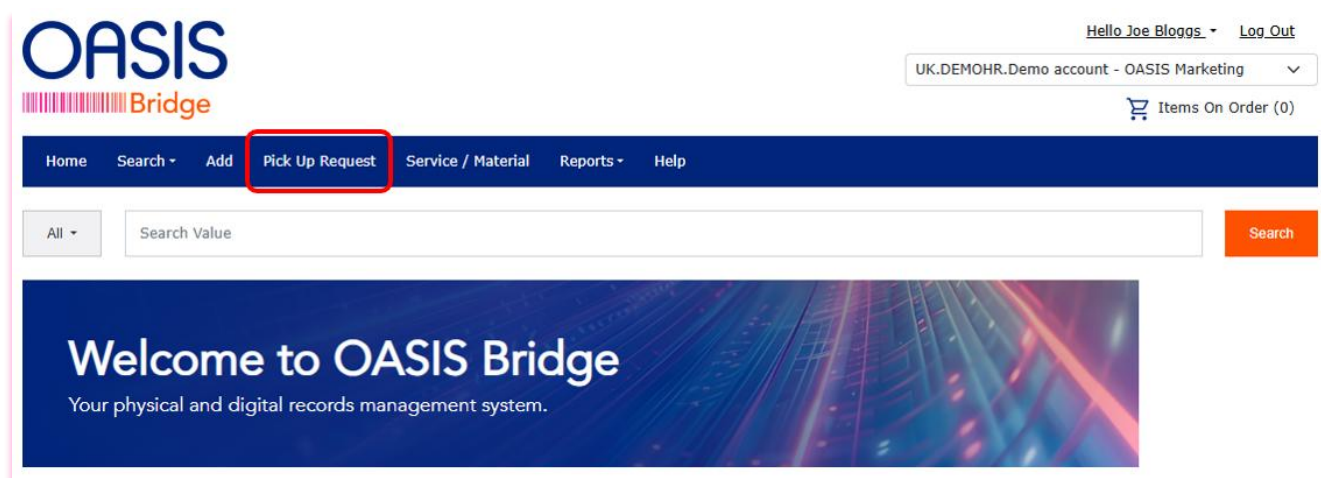
Key Features

- **No Barcode Required**: Unlike itemised collections where you provide barcodes in advance, the **Pick Up Request** does not require individual barcode numbers. Instead, OASIS can scan the items once collected
- **Efficiency**: If you have added multiple items over time and want them collected, this feature streamlines the process by allowing a bulk collection request
- **Barcoded Containers**: Items themselves must be barcoded, but if you have unbarcoded items like files, they must be placed in a barcoded container (e.g., a box or crate). These containers will be indexed and catalogued during the collection process
- **Audit Trail**: Since only barcoded items can be collected, this ensures there is a proper audit trail for tracking the movement of your items. Unbarcoded items cannot be collected due to the lack of an audit trail

This feature is particularly beneficial for clients with bulk storage needs and who have recently added numerous items into storage without detailed records of each item.

Steps for Submitting a Pick Up Request

Log in to OASIS Bridge and navigate to the Pick Up Request option on the blue menu bar.

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When submitting a **Pick Up Request** for unitemised items through OASIS Bridge, the **Pick Up Items** dialogue box will open with several fields to complete.

Fields to Complete

1. **Customer Account**
   - If you need to make the pick-up request for a different customer account, you can change the **Customer Account** field. This is useful if you have access to multiple accounts and wish to request a collection for a specific one

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2. **Selecting the Correct Item Type**

- If you need to collect a different type of item (such as **Tapes**), you can change the item type by selecting the appropriate option from the **Type** dropdown list

3. **Quantity**

- Specify the quantity of items you wish to collect, such as **2 Boxes** in this example. This ensures that the collection request matches the number of items you need picked up

After selecting the item type and quantity for your **Pick Up Request** for unitemised items, you should:

1. **Click Save**: This will save your collection request details
2. **Click Close**: This will close the **Pick Up Items** dialogue box and return you to the **OASIS Bridge home page**, where you can continue with the web order process

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Once you are back on the OASIS Bridge home page

1. **Check the Items on Order cart**: You will see the boxes you requested for collection listed here. The request type will be marked as **Pick Up** and the quantity (2 in this case) will also be displayed
2. **Click on "Send Order"**: This will proceed with the request to collect the items, and the order details will be sent to OASIS for processing

The **Complete Send Order** dialogue box will open, allowing you to finalize and complete the order details. Here is what you will do next:

1. **Review the Order Details**: Ensure that all the information, such as item type, quantity, and pick-up request, is correct
2. **Complete any Required Fields**: Depending on your specific setup or any additional details required, you may need to fill in fields like delivery address or any special instructions for the pick-up
3. **Confirm the Details**: Once everything looks good, confirm the order details

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If you need to update the service address during the Complete Send Order process

1. **Click on the Default Delivery Address**: This will open a dropdown menu
2. **Select the Alternative Address**: From the dropdown, choose the new service address where you want the items to be collected or delivered
3. **Verify the Details**: Ensure that the new address is correct before proceeding

To complete the Order Information section

1. **Customer Order Reference**: If required, enter the reference number or ID associated with the customer's order. This helps track and organize the order details
2. **Select Delivery Priority**: You can leave this field as "Next Day," which is the default Service Level Agreement (SLA) for delivery. If a different priority is needed, you can select the relevant option from the dropdown menu (if applicable)
3. **Update Department**: If the order needs to be associated with a specific department, click on the dropdown for **Department** and select the relevant department from the list (if applicable)

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To complete the Order Information section

1. **Comments Section**: Enter any useful information or special instructions that the driver may need to know when arriving onsite for the collection. This could include details such as access instructions, contact information, or any other important notes
2. **Click Send**: Once you have reviewed all the details and entered the comments, click on the **Send** button to submit the web order

This will send the order for processing, and you will receive confirmation that the pick-up request has been received and is being processed by OASIS.

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Once the web order is submitted

1. **Work Order Preview**: OASIS Bridge will show a quick overview of the order, including the **Non-Itemised Pickup** status (highlighted) to confirm the request
2. **Printing/Saving the Work Order**: On the top right of the preview, you will have the option to **print** or **save** the work order for your records

This confirms that your order has been successfully submitted, and you can now proceed with tracking or managing the pick-up request.

Adding New Items

To add new items to your inventory in OASIS Bridge, follow these steps. Keep in mind that depending on your user access rights, you should have the **Add** option on the menu bar from the home page.

Steps Overview for Adding New Items

1. **Accessing the Add Option**
   - From the **Home Page**, click on the **Add** option in the menu bar. This will open up the interface where you can add different types of items
2. **Adding a New Box**
   - Select the option to add a **Type Box**. You will be prompted to fill in the relevant information such as the **Box Barcode**, and **Other Relevant Details**
   - **Barcode:** The box should be assigned a unique barcode for tracking purposes
   - If needed, you can specify the **Department** or **Customer** that the box belongs to
   - Once all the necessary information is entered, click **Save** to add the box to the inventory
3. **Adding a New File**
   - Select the option to add a **Type File**. Similar to adding a box, you will need to provide details like the **File Barcode,** and any additional metadata that may be required
   - **Barcode:** Assign a unique barcode to the file to ensure it can be tracked and scanned in the future
   - Again, if relevant, you can specify which **Department** or **Customer** the file belongs to
   - Click **Save** to add the file to your inventory

Understanding the Hierarchy

- **Boxes** and **Files** are managed within a hierarchical structure:
  - **Boxes**: Physical containers that store multiple items (such as files)
  - **Files**: Individual items that are stored within boxes
- The system also manages **Customer Accounts** and **Departments** to categorize and assign ownership to different items

By following these steps, you can successfully add new items, whether they are **boxes**, **files**, or **non-barcoded items**, to your OASIS Bridge inventory. This allows for efficient tracking, organization, and management of your inventory.

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To add a new item to your inventory in OASIS Bridge, follow these steps:

1. **Access the Add Option**

   - Click on **Add** in the menu bar or select the clickable **Add** icon located at the bottom of the page

   - This will open the screen where you can add new items to your inventory

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2. To add a new item to the correct customer account and department:

- **Change the Customer Account (if needed)**
    - If you have access to multiple customer accounts, the system will default to the account selected at login. To switch accounts, click on the **Customer** dropdown and select the account where you want to add the new item
- **Assign to a Department (if applicable)**
    - If you need to assign the new item to a specific department within the selected customer account, click on the **Department** dropdown and choose the appropriate department from the available options

These steps will ensure that the new item is properly assigned to the correct customer account and department.

3. **To add a new box or item to your inventory**

- **Select Item Type**
    - By default, **Box** is selected as the item type
    - If you want to add a different type, click on the **Type** dropdown and select from the available options such as **Document** or **File**
- **Note on Available Options**
    - The available options under the **Type** dropdown may vary depending on the account type you have with OASIS, so you might see more or fewer options depending on your specific account setup

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After selecting the item type, you can proceed to add the necessary details for the new item.

4. **To proceed with adding a new item to your inventory**

- **Requested For**
    - You can leave the **Requested For** field as the default (which will typically be your own user account)
    - Alternatively, if you are adding the item for a different user, click on the **link** next to "Requested For" to update and select the relevant user for whom the item is being added

After selecting or updating the **Requested For** field, you can continue with adding the item's other required details.

5. **Complete the Reference Fields**

- The highlighted area will show all the available reference fields where you can input details about the box being added
- The **OASIS Barcode** field is mandatory, so make sure you have the barcode ready to enter
- While other reference fields might not be mandatory, it's recommended to fill in as much information as possible to ensure proper tracking of the item

6. **Save and Close**

- Once you've entered the necessary details, click **Save** to store the new item in your inventory
- After saving, click **Close** to return to the home page, where you'll see the updated inventory

By doing this, you successfully add the new box (or other items) to the inventory and ensure it's tracked correctly in OASIS Bridge.

Making sure reference headers are clear and informative is crucial for users when adding items. If you need any more guidance on updating reference headers or any other part of the process, feel free to ask your support team.

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After adding a new item to the system, it appears in the **"Items on Order"** cart automatically, as it's not yet part of the inventory. This helps keep track of what has been created and allows for further actions like processing or ordering.

If the contents of the cart are cleared at this stage, the new item(s) will be completely deleted, and no record will be saved. This means that you would have to re-enter the item(s) again, using the same barcode, following the same process as previously mentioned.

It is always a good idea to double-check the cart before clearing it, especially if you have just added important items.

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7. Submit a work order request

- Once you've reviewed the items in your cart and you're ready to submit the order, you can click on **Send Order** to proceed. This will take you to the next step, where you'll finalize and submit the order details to OASIS for processing

8. Complete Send Order Delivery Address

- If you need to update the service address, click the **Select Delivery Address** dropdown and choose an alternative address from the options available. If the default delivery address is correct, you can leave it as it is and proceed with the order

To clarify, when adding a new item to your inventory, you have two options regarding its collection:

1. **Adding the item but not collecting it right away**
   - You can create a web order without triggering an immediate collection
   - You would choose **Detail Indexing** for the **Select Delivery Priority**. This option will ensure the item is recorded in the inventory, but it will stay with you until you are ready to have it collected
   - You can continue to manage the item, order it, or request a collection whenever you're ready
2. **Adding the item and collecting it immediately**
   - If you need the item collected right away, you can proceed with the default **Next Day** delivery priority
   - This will create a web order that not only records the item in your inventory but also schedules its collection for the next day. You can then have the item collected and scanned to the record center location

Both options allow you to manage and track the item within the system, but they differ in the timing of the collection.

Detail Indexing Work Order

- Choose **Detail Indexing** for the **Select Delivery Priority**.

Once you have selected the appropriate options for the item and its collection, you can complete the order submission:

- **Change to Department**: If necessary, you can assign the item to a specific department by updating the **Department** field
- **Customer Order Reference**: If a customer order reference is required, fill in this field with the relevant reference number for the order

After filling in the required information

Click Send to submit the order request. This will complete the process of adding the item and either scheduling its collection or confirming its indexing for future collection

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Once the web order is submitted

- **Preview Work Order**: OASIS Bridge will display a preview of the work order with all the details recorded for the new item
- **Priority Highlighted**: The **Priority** is set to **Detail Indexing,** which indicates that the item is not yet scheduled for collection but is added to the inventory
- **Print and Save Options**: If needed, you can print a copy of the work order or save it for your records by using the **Print** and **Save** options
- **No Further Action**: Since the item is not being collected immediately, no further action is required at this stage. The item will remain with you until you decide to request its collection

OASIS will not collect the item until a collection request is made in the future.

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Collection Work Order for Next Valid Service Day

When you want to collect an item immediately after adding it to the inventory:

- **Follow the steps to add a box** to the inventory as you did earlier
- **Complete the Delivery Address**: Ensure the service address is correctly filled out
- **Select Delivery Priority**: Choose **Next Day** as the default delivery priority, which is in line with your Service Level Agreement for deliveries and collections. This ensures the item will be collected on the next available service day
  - For example, if the order is submitted before 3 pm on Monday, OASIS will aim to collect the item before 5 pm on Tuesday (if this is a valid delivery day)

This option ensures that the item is collected and processed in accordance with your service level agreement, and the collection is scheduled for the next available day.

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After completing the required details

- **Fill in the remaining Order Information fields**, such as any necessary Customer Order Reference or Department, if applicable
- **Click Send** to submit the order request to OASIS

This will submit the web order for collection, and the item will be scheduled for the next available collection day based on your service level agreement.

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Once the web order is submitted

- **OASIS Bridge will preview the work order**, showing all the details recorded for the new item
- The **Priority** will be highlighted as **Next Day,** indicating the collection will happen on the next available service day
- OASIS will **schedule a collection** based on the **Address** and **Due Date** provided in the web order
- The **Print** and **Save** options will be available if the user wishes to print a copy of the web order or save it for their records

No further actions are required unless additional changes or updates are needed.

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How to Add Files

To add a new file to the inventory:

- **Follow the same steps** as when adding a box to the inventory
- Ensure that you have an **OASIS File Barcode** ready. This barcode will generally be **longer** than the barcode used for a box
- Enter the **barcode number** in the relevant field and proceed with the necessary reference information

After entering all required details, click **Save** to add the new file to the inventory.

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The **Retain data entered on add** option is a useful feature when you need to add multiple files with similar details. Here is how it works:

1. **Select the Retain data entered on add option.** This will keep all the information you have entered for the first file, allowing you to quickly add subsequent files with the same details
2. **Update the OASIS File Barcode** for each new file. Remember, barcodes must be unique, so ensure you replace the barcode for each new file being added
3. **Other fields** will retain their previously entered values, so you only need to update the barcode or any other specific details that differ between files
4. **Save** each file after entering the necessary details

This feature helps save time and ensures accuracy when adding multiple files with similar information.

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- When you click **Save**, OASIS Bridge will highlight the **OASIS File Barcode number**, indicating that it is a mandatory field. This ensures that each new file has a unique barcode number, which is essential for proper tracking and inventory management
- Make sure to update the barcode with a new, unique value before saving the record. This step is necessary to avoid duplicates and maintain accurate inventory records

5. Once all new files have been added and the required barcode changes are made, click **Save and Close**.
6. This will save the new file records and return you to the home page. Just like with the new box added in the previous guidelines, the new items (files) will now appear in the **Items on Order** cart, allowing you to review or proceed with the next steps for order processing.

7. To submit the web order for the new files, follow the same steps outlined for a new box:

    1. **Complete the delivery address details** as required
    2. **Choose the appropriate delivery priority**
        *   If you want to hold the items, select **Detail Indexing**
        *   If you want the items collected the next available day, choose **Next Day**

The process for **Detail Indexing** and **Next Day** priority actions will be the same for both files and boxes, depending on your requirements.

After making the appropriate selections, click **Send** to submit the web order. OASIS will process the request and schedule the collection or indexing according to your chosen priority.

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OASIS Bridge Reports

General Reports

These reports come with predefined criteria and run based on how they were developed, providing quick access to various reports related to inventory.

To run inventory reports through General Reports in OASIS Bridge:

- **Navigate to Reports:** Click on the **Reports** menu
- **Select General Reports:** From the dropdown, select **General Reports**

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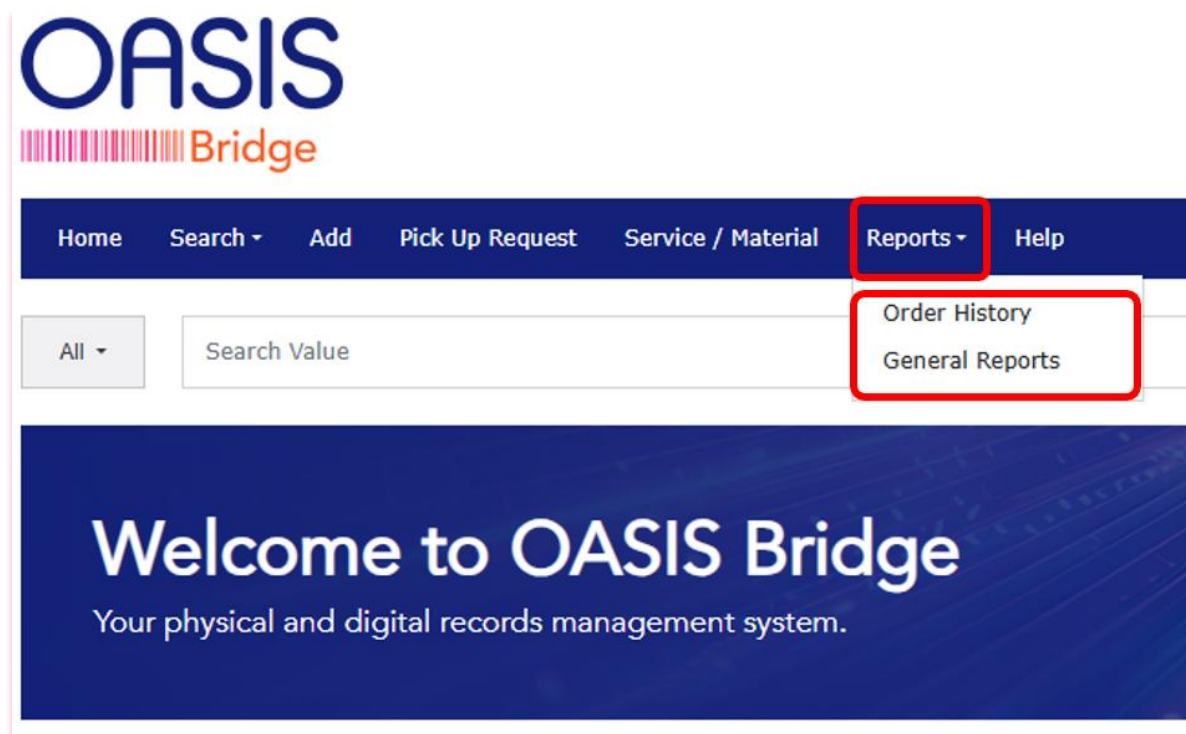
When accessing **General Reports** in OASIS Bridge:
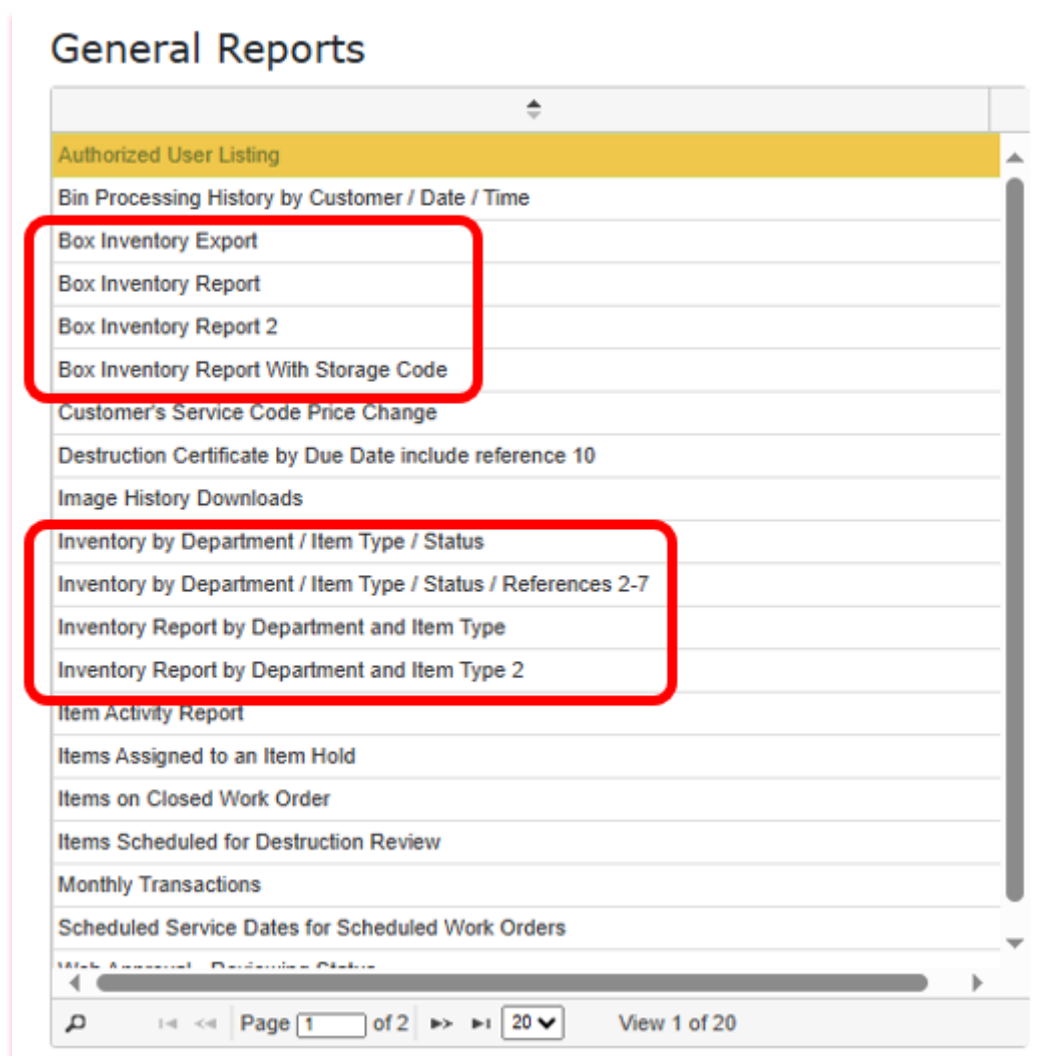
1. **Screen Layout:** The screen is divided into two sections:
   - **General Reports (left-hand side):** Displays a list of available reports
   - **Report Parameters (right-hand side):** Where you can set any relevant parameters for the report
2. **Main Inventory Reports:** The most relevant reports related to inventory will be highlighted in the list of available reports
3. **Report Fields:** These reports contain specific fields with information that will appear if data has been recorded. If no data is available for a field, it will appear blank in the report
4. **Customization:** Currently, users cannot customize these built-in reports. It is recommended to explore these reports to find the one that meets your needs best

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To run an inventory report

1. **Select the Report:** Click on the desired report from the list. For example, the **Box Inventory Export** report
2. **Select Customers:**
   - The screen will load with an option to **Select Customers**
   - If you wish to report on multiple accounts, you can leave it at the default (All)
   - If there are multiple accounts and you only want to select one, click the **Select All in List** checkbox to deselect all accounts, then manually check the box next to the specific account you want to report on
3. **Proceed:** Once you have selected the customer(s), click **Next** to continue to the next step of generating the report

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After selecting the customer

1. **Select Departments:** The next screen will allow you to **Select Departments**
   - If you wish to include all departments, leave it at the default setting
   - In this example, the inventory report will be run specifically for **Dept 2** and **Dept 3**
2. **Deselect All Departments:**
   - Click **Deselect Select All in List** if you want to manually choose departments
   - Then, check the boxes next to **Dept 2** and **Dept 3**
3. **Proceed:** Once you have selected the relevant departments, click **Next** to move on to the next step in generating the report

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On the final screen

1. **Leave Default Parameters:** The default parameters are typically pre-set to gather necessary data for the report. You can leave them unchanged unless you have specific preferences
2. **Select File Format:** Choose the format in which you would like to export the report
   - **PDF** is the default option, but you can select other formats from the dropdown, such as:
     - **Image**
     - **Work**
     - **Excel (XLS)**
3. **Execute Report:** Once the desired format is selected, click on the **printer icon** to execute the report query. This will generate and export the report based on your selected parameters

The report will then be processed and available in the chosen format for download or viewing.

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Once the report query is completed

1. **Report Display**: The **Box Inventory Export** report will open as a **PDF**. You will see the data based on the selected criteria, such as the customer, department, or any other parameters specified
2. **Download Option**: If the report was run using the **PDF format**, the user will have the option to **download** the report as a PDF file for local storage or printing

This allows the user to access the report offline and use it for record-keeping or further analysis.

Box Inventory Export
OASIS Great Britain

Customer	Department	Type	OASIS Barcode	Internal Box Reference	Year	Additional Information	Location	Add Date	Destroy/Review Date	Retention
DEMOHR	DEPT 2 – DEPARTMENT 2	BOX	03637846	Leavers 2002				07/12/2020	31/12/2032	12 Years
DEMOHR	DEPT 2 – DEPARTMENT 2	BOX	03637862	PAYE 2017	2024	test		07/12/2020	31/12/2032	12 Years

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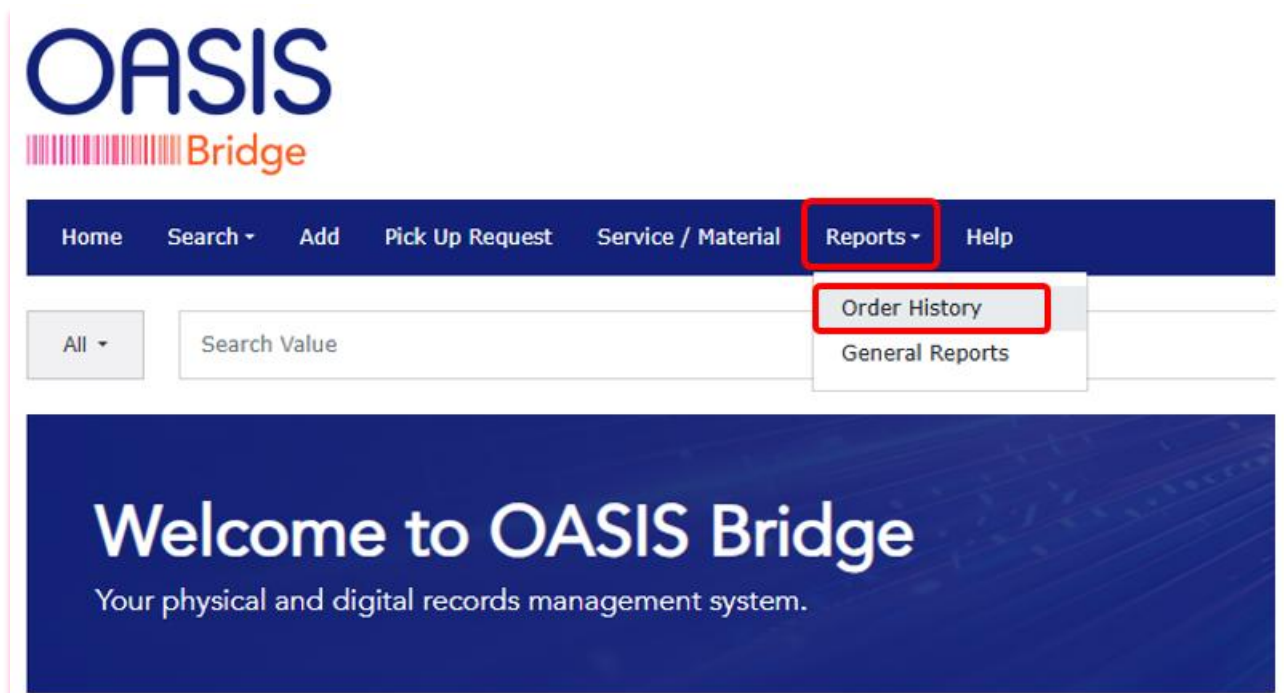Version: X.X
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Order History Reports

By running these reports, users can gain insight into their past orders and track various actions, helping with order management and historical record keeping.

To access the Order History Reports

1. **Navigate to Reports**: Click on **Reports** from the menu bar or the clickable icon at the bottom of the **OASIS Bridge** page
2. **Order History Reports**: Once in the **Reports** section, you will find the option to view the **Order History**. This report allows you to query the web orders that have been placed, providing details on the orders, items, and any actions associated with them

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Once the **Order History Search** page loads:

- You will see options to filter and narrow down the search criteria for past orders

Work Order History Search using Work Order Due Dates

Once you have selected the relevant **Customer** and **Department** (if applicable):

1. **Customer**: If you have access to multiple customer accounts, use the **Customer** drop-down to select the specific account you are interested in. If you do not change it, the system will default to the account selected during login
2. **Department**: You can choose to run the order history report for all departments or narrow the results by selecting a specific department from the **Department** drop-down menu

This allows for tailored reporting based on your account and department, providing specific details about past orders.

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If you are unsure of the specific work order numbers but want to generate the report based on the due date range, here is what you can do:

1. **Begin Due Date**: Enter the starting date range for the work orders
2. **End Due Date**: Enter the ending date for the due date range

These dates represent the **Service Date** associated with each work order, which is calculated when the work order is submitted, in accordance with the **Service Level Agreement** (SLA).

3. Once you have filled in the **Begin Due Date** and **End Due Date** fields, click on the **Search** button to run the query, and generate the report

This method allows you to track work orders by their scheduled due dates rather than needing the exact work order numbers.

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Viewing the results

Once the report is generated based on the **due date range**, if any work orders fall within the specified date range, they will be displayed in the results. Here is what you will typically see in the results:

- **Work Order Number**: The unique identifier for each work order
- **Created Date**: The date when the work order was created
- **Order Status**: The status of the work order (e.g., pending, completed, etc.)
- **Other Relevant Details**: Depending on the specific report, you may see additional information related to the work order, such as customer details, department, or type of service requested

These results provide an overview of the work orders matching your criteria, allowing you to track their status and details. You can then further act on them if needed.

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To the left of each work order in the **Order History Reports** results, you will find options to run specific reports for each work order. These include:

1. **Web Work Order Report**: This report will provide detailed information on the work order, including the items and services associated with it. It gives a comprehensive view of the order's specifics
2. **Delivery Receipt Report**: If the work order involves a delivery, this report will show details about the delivery, such as the items delivered, the delivery date, and confirmation of receipt

By selecting one of these options, you can generate a detailed report for each individual work order, which is helpful for tracking deliveries or reviewing specific details about the order.
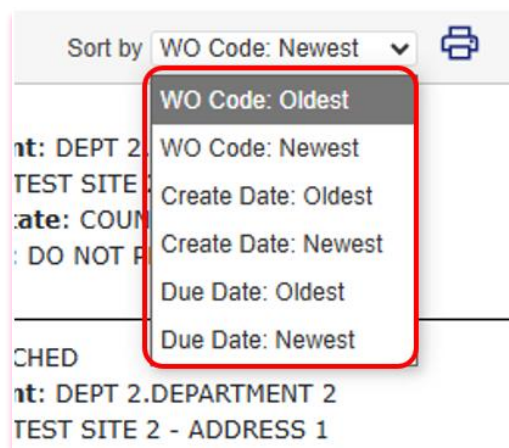
Sorting Search Results

At the top of the **Order History Report** results, the user can sort the displayed results based on the following options:

1. **WO Code (Work Order Number):** Sorting by this option will organize the results by the unique work order numbers
2. **Create Date:** Sorting by the create date will arrange the results by the date when the work order was submitted, allowing you to see older or newer orders first
3. **Due Date:** Sorting by the due date will display the work orders in order of when they are scheduled to be serviced, from the earliest to the latest service date

These sorting options help the user quickly locate specific work orders based on key dates or identifiers.

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Printing Order History Reports

When you click on the **printer icon** in the **Order History Report** results, the **Work Order Reports** dialogue box will open, where you can select the specific report you want to run.

1. **Select the report**: From the **Report Name** drop-down menu, choose the report you want to generate, such as **Web Work Order** or **Delivery Receipt**, depending on your needs
2. **Proceed**: After selecting the desired report, you can continue with the process to generate the report

This feature helps users generate detailed reports based on individual work orders for further review or action.

Web Work Order Report

Once you have accessed the **Work Order Reports** dialogue box:

1. From the **Report Name** drop-down menu, select the **Web Work Order** report

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To finalize running the report

1. **Change the file format** under the **Report Type** dropdown if you want a format other than PDF (e.g., Excel, Image, etc.)
2. **Click Print** to generate and display the report in your selected file format

This will generate the Web Work Order report in the format you selected, allowing you to review or download it as needed.

Once the Web Work Order report is generated

- **PDF Format**: The report will load in a new browser tab for you to view
- **Word or Excel Format**: The report will be automatically downloaded to your machine

This report serves as the official confirmation of the work order, showing that your order has been successfully received and queued for processing. It mirrors the work order generated after the initial web submission.

OASIS Great Britain
Work Order: B139308

Due Date: 24/02/2025 5:00 PM

Customer:	Demo account – OASIS Marketing		Requested By:	Joe Bloggs

Address:	TEST SITE 2
	TEST SITE 2 – ADDRESS 1
	TEST SITE 2 – ADDRESS 2
	TEST SITE 2 – CITY, COUNTY 2 POST CODE 2

Phone:	0123 456789
Dept:	DEPT 2
Customer Refere:	DO NOT PROCESS
Route:	NW CHE Destructions

Priority:	Next Day

Notes:	WORK ORDER 2 – DO NOT PROCESS

Requested For: Joe Bloggs

Item Code	Reference Info	Dept	Item Type / Action
DSB46515657		DEPT 2	BOX Pending Retrieve
	Pending Retrieve		

Summary of Activity

Deliver BOX
1

Date / Time	Driver Signature	Printed	Customer Signature	Printed

Delivery Receipt Report

The **Delivery Receipt report** provides details about the work order and the delivery or collection process. However, if the work order is not completed, the report will not show a signature. Here is how it works:

- **Work Orders Not Completed**: These will not have a signature in the report
- **Completed Work Orders**: Once the delivery or collection is completed, the driver captures a digital signature. The signature can be:
    - Directly from the person accepting the order, or
    - Signed on behalf of the person receiving the delivery
- **Signature Upload**: After the work order is completed, the digital signature is uploaded to the relevant work order and will be included in the Delivery Receipt report

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Work Order History Search using Work Order Number

If you know the specific work order numbers you want to query, follow these steps:

1. **Enter Work Order Numbers**: Use the **Begin WO Code** and **End Work Order Code** fields to specify the range of work order numbers you want to search for
2. **Click Search**: Once the range is entered, click on the **Search** button to run the query and retrieve the relevant results for those work orders

Viewing Search Results

If there is a match for the range of work order numbers entered, the results will be displayed on the screen. These results will show the relevant work orders that fall within the specified range, including details such as:

- Work Order Number
- Create Date
- Due Date
- Order Status

This allows you to review all work orders within the range you specified and take any necessary actions based on the information provided.

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OASIS Bridge Help Centre and Knowledge Base

The **OASIS Bridge Help Centre** and **Knowledge Base** serve as central hubs for all user support materials, including **user manuals, quick reference guides, and FAQs**.

What you will find in the Help Centre

OASIS Bridge User Manual

- The **most comprehensive guide** to using OASIS Bridge
- Includes step-by-step instructions on system features
- Available for **viewing and download**

OASIS
Information Secured

Knowledge Base

All the resources you need to get the most out of OASIS Bridge quickly.

User manuals

English	Dutch	French
OASIS Bridge Manual 2021 English	OASIS Bridge Handleiding 2022 V1.3 (BE+NL)	OASIS Bridge - Guide de l'utilisateur 2017 (French)
Manual EN	Handleiding NL	Mode d'emploi FR

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