**OASIS LITE Basic Ordering Guide**

**IMPORTANT NOTE**: This guide represents OASIS LITE selection and ordering at the most basic level, with a username/password set up to pass on titles placed in your Shopping Cart to the member of your library staff who is authorized to deal with your orders.

**OASIS can be configured in many ways to integrate effectively with your workflow and preferred ordering method, including the placement of orders directly with Coutts from the OASIS LITE Shopping Cart facility. Your library acquisitions contact will be able to advise you of the current set-up.**

**General Principles**

To access OASIS LITE you need a username and password provided, with the agreement of the library, by Coutts Customer Services. Usually, users at an institution will each have their own personal username and password. They may be set up to use the full version of OASIS or alternatively, OASIS LITE.

There are two basic levels of access that can be allocated to a username/password for day to day functions:

1. **Selector**

   This level of access gives the user the ability to prepare orders in Lists or a Shopping Cart; their selections then need to be sent to their Ratifier for authorisation and ordering. A Selector may receive New Title Notifications tailored to their needs and prepare orders from those. (See page 30)

   Note that even though this level of access does not grant ordering rights, the selector still uses the ‘Shopping Cart’ to put their selections into and send to their ratifier. Titles thus sent may be viewed in the ‘Sent to Ratifier’ folder where the latest status is shown.

2. **Ratifier**

   This level of access gives the user the ability to prepare and order from Coutts and can be a full or LITE OASIS user. In addition, a ratifier can review, authorise and order selections prepared by a colleague with selector level access (see above).

   The order checkout method illustrated here is a simple ‘Create Firm Order’ whereby orders move straight to Coutts online and appear immediately in Order History. There are other checkout methods available.
1) Logging On – www.couttsoasis.com

- Enter your username and password (these are case sensitive)
- Click ‘Login’
  This process will automatically recognise you as either a full or LITE OASIS user and this will be reflected in the menu and screens that are presented.
- Browser compatibility and ‘troubleshooting’ information can be accessed via the link bottom right of the login page.
2) What’s New in OASIS LITE

This will pop-up, telling you of the latest developments on OASIS.

A Special version for LITE will be put in place.

- Click ‘Dismiss’ if you do not want to see this update next time you log in
- Click ‘Close’ if you would like the update to re-appear next time you log in.
3) Default landing page and the Home Page

The default opening page for OASIS is the Simple Search page (See section 5 below). To change this, go to the Home Page by clicking on the OASIS logo top left. On that page is a facility to choose your preferred opening page. Once you have made that choice and saved it, when you login, you will be taken straight to that page.
4) LITE Help Portal
Once logged in, the LITE Help Portal may be accessed from the link in the Menu or via the ‘Help’ link top right of the OASIS window. Within it you will find comprehensive help including a handy A-Z content list to aid discovery of relevant help documents.
5) Basic Navigation

You can access each section simply by clicking on the relevant header on the left hand side of the screen (e.g. ‘Search All Titles’ or ‘Shopping Cart’).
6) ‘Search All Titles’ Screen

Users have two options, ‘Simple’ and ‘Advanced’. The ‘Simple’ screen has the basic search options. The ‘Advanced’ screen offers more fields providing more targeted search results. Each offers a link to the alternative. Your choice of search screen is retained until changed again.

**Simple Search**

Features eight easy to use fields.

![Simple Search Form](image-url)
Advanced Search

Offers many more options, enabling carefully pinpointed searching.
7) The Results Screen

Results are presented in a simple list format enabling detailed viewing and for the selection/deletion of titles.
Title Details

EHAWC 2009 (2009: San Diego, California, United States)
Springer

Paper
Proceedings
44.99 GBP
74.05 USD
978354027307
HD729.D37
WAA440
363.119004

Electronic data processing personnel--Health and hygiene--Congress.
Occupational Diseases--prevention & control--Congress.
Computer Terminals--Congress.
Human Engineering--Congress.
Upper Undergraduate
Graduate - Research
Paperback

This book constitutes the refereed proceedings of the International Conference on Ergonomics and Health Aspects of Work with Computers, EHAWC 2009, held in San Diego, CA, USA in July 2009 in the framework of the 13th International Conference on Human-Computer Interaction, HCI 2009. This volume contains 38 papers in the thematic area of Ergonomics and Health in the Workplace, New Trends in Ergonomics, as well as Interaction Devices and Environments.
Floating tabs
Cursor placed on browse row brings up hover box displaying 'tab' icons which when each is clicked provide pop-up boxes.
Details can be accessed by either clicking in the hoverbox or by clicking on any ‘Check Status’ statement in the browse row.

**Montgomery, L. - China’s Creative Industries**
ISBN/EAN: 9786612908583 [661-290-858-0] In an Inbox Order Info See inside the book
(Electronic Book 119.90 GBP - Multi-user license) (All Coutts Demand: 15)
eBOOK AVAILABLE
Initial Selector: E. Crowley

**Dunning, J. - New Challenges for International Business Research**
(Electronic Book 119.90 GBP - Multi-user license) (All Coutts Demand: 7)
eBOOK AVAILABLE
Initial Selector: E. Crowley

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<thead>
<tr>
<th>Type</th>
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<th>Quantity</th>
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<td>661-290855-6</td>
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<td>1</td>
<td>25-Jan-2011</td>
<td>Acquisitions Team</td>
</tr>
<tr>
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<td></td>
<td>Cloth/HB</td>
<td>0</td>
<td>25-Nov-2010</td>
<td>Emma Crowley</td>
</tr>
</tbody>
</table>
A basic MARC record is displayed.
**Order Info**

'Show Order Info' determined by 'Preferences' setting in Admin or can be changed for the duration of browser session by clicking/unclicking checkbox bottom left of pop-up. Default Fund, Location and Loan Type settings will display. Any mandatory fields are enforced in the normal way. (This displays in Search Results, Lists, Shopping Cart and Authorize Orders and can be completed line by line as in main OASIS).

'Save' applies the details entered to the currently highlighted title only.

'Fill All' applies the details entered to all titles in the list.

'Fill Selected Only' applies details entered to titles with the 'Select' column checked.
8) Add to Shopping Cart

In Search Results, hover on in the ‘Cart’ column to display options
- Add all titles currently listed to the Cart
- Add the one title to the Cart

These are ‘instant’ actions which move the selected title(s) directly to the Shopping Cart as ‘1’ copy. The quantity may be edited before doing this or later in the Shopping Cart itself.

The screen will refresh, the item will be placed in your shopping cart and the record will disappear from your search results.

Once items are placed in your shopping cart, they will remain there until you process them. You can log out and log back in at a later date without losing them.

9) Add to List (or forward to a colleague)

In Search Results, hover on in the ‘List’ column to display options
- Add all titles currently listed to a List or Lists
- Add the one title to a List

These are ‘instant’ actions which move the selected title(s) directly to the List as ‘1’ copy. The quantity may be edited before doing this or later in the List itself.
The List/Forward dialogue appears with the opportunity to create a new list if so required. Click on the list you wish to add to and click ‘Add’ or ‘Cancel’ to abort.
If wishing to forward to a colleague, click on the person’s name in the ‘Forwarding’ section and click ‘Add’ to send or ‘Cancel’ to abort.
Once items are placed in any list, they will remain there until you take further action on them. You can log out and log back in at a later date without losing them.

10) **Delete title from Search Results**

Click ![warning](warning.png) and a warning pop-up box appears.
‘OK’ to remove from list permanently or ‘Cancel’ to abort.
All titles may be deleted from Search results by simply navigating away or starting a new search.
11) Lists
A convenient place to assemble titles for ordering, prior to sending to the Shopping Cart. Used like ‘Search Results’ with option to send titles to a Cart, move to a different list, Delete individual titles or to ‘Empty Current List’. On Lists, Slip Notifications and Authorize Orders, the ‘floating tabs’ feature is present, enabling Order Info to be added, item by item, amongst other things.
12) The Shopping Cart

All ordering can only be carried out from the Shopping Cart.

Click on the ‘Shopping Cart’ option. All items in your shopping cart will display.

Titles default to ‘1’ copy unless amended before being sent to the Cart and are checked as ‘Select’ ready for ordering. The quantity can be changed as required and totals will be automatically adjusted. (A ‘maximum quantity’ level per title may have been set by the administrator.)

Option to Select or Deselect titles individually or ‘Select All’.

Option to Delete individual titles or ‘Delete All’ (operates the same as in section 10 above).
The total number of copies and gross price in your billing currency will appear at the bottom of the list.
Check Out

Click 'Check Out' button – brings a warning message if Order Info has not been completed for any of the selected titles.
Clink ‘OK’. This will automatically bring open the ‘Order Info’ box for completion. Any pre-set field options will be available in dropdowns.

'Save' will apply details to currently highlighted record only.
'Fill All' will apply the same details to every item in the Shopping Cart.
'Fill Selected Only' applies details entered to titles with the 'Select' column checked.

Click ‘Checkout’ again. A confirmatory message displays – click ‘OK’.
The request is processed.

A Selector will then be able to immediately see the titles confirmed in their ‘Sent to Ratifier’ folder marked ‘Awaiting Ratification’. When this is updated, e.g. by an order being placed by the Ratifier, this status message will be updated and the titles will be able to be found in ‘Order History’. See 14) below.

In the case of a Ratifier, the final ‘Processing’ will send the order (and immediately appear in Order History) or carry out a MARC download or quotes message as per the library’s checkout settings. See 16) below.
14) **Sent to Ratifier**
Accessible from the menu, this displays titles you have sent to your ratifier for authorization and shows the current status.

![OASIS Lite Test Account figure](image)

*Click on the Status to see further details*
15) Inbox
By default, titles forwarded to you by colleagues are delivered to the Inbox. Forwarding is carries out using the List/Forward function as in 9) above. In the browse row, the sender is displayed.
16) Ratifier
A LITE Ratifier will find titles sent for ratification by selectors in the **Authorize Orders** folder. From there they can be managed in the same way as Search Results (above). The final ‘Processing’ will send the order or carry out a MARC download or quotes message as per the library’s checkout settings.
17) Search Orders
Flexible search parameters permit quick and easy access to order status information. ISBN and Purchase Order No. are the fastest routes. This will be refined in a later release in order to make latest orders quick to find.
18) New Title Notifications (Optional)

Here is a chart that outlines the general process that occurs in order to provide you slip notifications:

1. Books shipped to library and library reviews titles
2. Metadata from multiple sources
3. Library collection developers select titles from notification slips
4. Book-in-hand description by Coutts' Selectors
5. Matched with library profiles
6. New title notification slips delivered electronically
7. Books automatically shipped and library reviews titles
**Viewing slips**
Slips can be managed in the same way as search results or list contents.

Please contact your OASIS Administrator if interested in receiving new title notifications. A link is provided in the OASIS LITE menu.
OASIS LITE – Workflow for Selectors and Ratifiers

Search All Titles → Slip Notifications

List of titles in browser

Selector: not required to add order info
- Send title(s) to Shopping Cart
  - Go to Shopping Cart
  - Select/Deselect titles as required
    - Checkout
    - Titles go to designated Ratifier for ordering

Selector or Ratifier: required to add order info
- Send title(s) to Shopping Cart
  - Go to Shopping Cart
  - Select/Deselect titles as required
    - Add Order Info
    - Checkout

Add titles to one or more lists
- Go to Lists

Add Order Info at this stage if required
- Send title(s) to Shopping Cart

Selector - Titles go to designated Ratifier for authorisation and ordering
Ratifier - Orders are placed via usual library checkout method