Title Selection in OASIS
In this session we are going to look at different ways to place a firm order through OASIS and provide you with a one of many workflows and/or tips that will assist you as you are making selections for your library.

Definitions - Administrator, Ratifier, Reviewer, Selector

Selector Role in OASIS

Administration – Selector Account
- Identify your security level
- Workflow Levels
- Accept Forwarding – what does this mean?

List Maintenance
- List Types
- Slip Forward Eligible – What does this do?
- Life Cycle, setup notifications, forward to a colleague or professor, etc...

Selecting a Title
- Action Arrow options
- Mark All
- Process List

Follow-up on your orders
- Sent to Ratifier
- Search Orders

Management Reports
### Slide 3 – OASIS User Definitions

**OASIS User Definitions**

- **Administrator** – The one person for each account with responsibility for Administration.
- **Ratifier** – Person at the library authorized within OASIS to place orders or to download titles for ordering via EDI from the local system.
- **Reviewer** - reviews orders prior to submission to Acquisitions or the Ratifier.
- **Selector** – Person responsible for the selection of books for the purpose of placing orders. A selector’s selections are often passed to a **Ratifier** for creation of orders, or sent to a **Reviewer** in a 3-tier workflow.

### Slide 4 – Role of a Selector

**Role of a Selector**

- **Selectors** make choices on titles and then passes them along to your Acquisitions Department – or, as referred to in OASIS, a **Ratifier**.

There are many ways to accomplish this process works, however, the basic concept is a **Selector** selects titles from OASIS and a **Ratifier** orders those titles from Ingram.

- **Selectors** work through their titles, often weeding through them until they have a set to send to the **Ratifier**.

Often, **Selectors** are asked to add various order details to their selections, such as **Fund Code** and **Location Code**. After all notes and order information is affixed to the title, it is ready to be sent on its way.
In the main menu on the left go to Administration then select Manage Account directly below that. Go to the Security tab to the right – first of several tabs.

The Administrator has set this particular user up as a Selector. I can tell this because ‘Authorization Required’ has been assigned next to PLACE ORDER in the lower screen under Firm Order.

If I were setup as a Ratifier there would be a green check next to RATIFIER in the lower portion of the screen and PLACE ORDER would say Automatic Authorization.

A 3-tier workflow would include a review: 1) Selector sends to Reviewers ‘Authorize Orders’ when processed, 2) Reviewer sends to Ratifiers ‘Authorize Orders’ when processed, 3) Ratifier processes and sends orders to Coutts either through OASIS or via EDI.

There are 3 authorization levels which are also set by the administrator.

**Read Only** – does not allow any actions but the user can search and view title information.
**Authorization Required** – generally used for Selectors but can also be used in a three tier workflow. Allows actions to be taken but does not allow the Selector to do the final authorization.
**Automatic Authorization** – allows the user full access.
List Maintenance is where the individual user can manage who they want in their Action List/Forward and also where they can manage individual lists.

There are 3 types of lists identified in OASIS: 1) **System lists** – which are created automatically, 2) **Saved Lists** – which are the individual users lists and faculty forward emails, and 3) **Other Users** – this refers to other Library OASIS users or your colleagues.

Individual user lists can also be managed in **Lists & Groups** but **List Maintenance** is the only place where **System** and **Other Users** can be managed.

An important feature to note is the **Slip Forward Eligible** box in the lower screen. When you highlight a list and an editable box appears in the lower screen you can control whether or not that list in the List/Forward dropdown option. This can be used to suppress lists in the Lists & Groups that contain completed information such as lists for tracking expenditures. Or, another example is to suppress **Other Users** that you do not communication with within OASIS – this is especially helpful to libraries who have a lot of selectors or OASIS users, but you don’t want to scroll through all the names just to get to the 1 or 2 that you have need to communicate with.

Another important list feature is the ability to set or control the **Life Cycle** of some lists. Generally this is available to you on those lists which you are able to edit. If you see a dropdown next to **Life Cycle in** the lower screen then you are able to edit it. Otherwise it is system assigned.

ANY change you make in Administration has to be saved or the change will not happen. If you don’t see the change immediately – log out and log back in again.
Selecting a Title

Selections can be made from any browse row list that has a green Action arrow with the 'Select' options shown in this screenshot. There are 3 selection options. The one you choose depends on your preference.

**Mark for Selection** – using this feature places an action above the green Action arrow for the selected title. This feature is generally used when reviewing and making a decision on each title in the list then batch processing using the Process List button in the upper right corner. A user can combine several different actions in this batch process including selection, sending to a shopping cart, recycling and forwarding to a list or a colleague.

**Select Now/Retain on List** – this feature is commonly used to immediately send the title on to either your Reviewer or Ratifier (depending on your workflow) and it will retain the title in the current browse row. A note is added to the title stating that it is **Awaiting Ratification** and the note is in red warning you that an action has been taken on this title.

**Select Now/Remove from List** – this feature is used to immediately send the title to either your Reviewer or Ratifier (depending on your workflow) but it will remove the title from your current browse row. So if you start out with 36 titles in your list that number will change to 35. This method of selecting is preferred if the user wants to visibly see their progress as they move through the list.
Each **Selector** can track their selections sent to the **Reviewer** or **Ratifier** through the **Sent to Ratifier** folder. Titles remain in this folder for 365 days. All selections in the folder are for the individual user.

It is important to note that ALL users can see the red **Check Status** which shows this title is **Awaiting Ratification**.

**Slide 9 – Mark All Options**

In this example I have 385 titles and I want to batch process the entire list. To do this I would click on the Mark All button then tick the first entry for Mark All for Selection and click Mark.

This will put the action word **Select** above the green **Action** arrow on each title (all 385 titles).

You can select to process only those titles displayed on the current page when you do have multiple pages by changing the option in the top of the pop-up box from 'On Entire List (385) to 'On Current page (60 titles). You can also decide how many titles display on each page by moving the slider bar up or down. In this instance each page has up to 60 titles displaying. If you choose the current page option you will need to repeat this process for each page.
If you want to save the same order information to all titles on your list you can do so from one title. Simply call up the order information form on one title in your list (any title). Fill out the information to be copied to all titles or actioned titles (usually fund, quantity and location – but other fields can be selected as well).

There are three save options across the top of the order information form: 1) the first is to save the information to the one title you have selected, 2) the second is to save the information to ALL titles on your list, 3) and the last option is to save the information only to those titles on your list that have an action noted above of the green Action arrow. In this last scenario if you clear the action on one of the 385 titles in the example list then only 384 will receive the same order information saved.

Once you select either All Titles on List or All Actioned Titles on List you will get another box as noted in the next screenshot.

Here you can opt to check only those fields you want saved to all records or all actioned records. Or, you can opt to save to All Fields Below.

There is also an option here to overwrite information already saved in the form.
The last step in batch processing is to process the list.

Click the **Process List** button in the upper right corner. Check the box that applies (in this case we are checking out selections but we could also have titles we are recycling or forwarding to a colleague or list).

The number on the right of the pop-up should match the actions you are taking.

Once you Click **Process** the titles will be sent to your **Reviewer** or **Ratifier** and will disappear from your screen (unless you checked the **Retain on List** box). All your selections will be listed in the **Sent to Ratifier** folder for you to review. If you did recycle any titles those titles will be in the recycling box. And, any titles forwarded to a list will be in the Lists & Groups folder.

Slide 13 – OASIS Help Portal