

OASIS
Information Secured 

BRIDGE

User Guide 2020



OASIS Group
www.OASISGroup.com



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Contents

1.	Introduction	4
2.	Login Instructions	4
3.	Database Searching	5
4.	Item Retrieval	6
5.	Multiple Database Searches / Delivery Requests	7
6.	Supply Orders	8
7.	Pick-Up Orders	8
8.	Add Inventory - New Containers / New Files	9
9.	Edit Containers / Files	10
10.	Log Out	11

1. Introduction

This User Guide is provided to assist in educating OASIS Clients on the use of the OASIS web-based inventory management system, OASIS Bridge accessed through the Client Login portal located at the top right of the homepage of www.OASISGroup.com.

OASIS Bridge represents the most comprehensive solution in the Records and Information Management (RIM) industry, **defining all the ways we interact and everything we do together, to manage your information.**

Through OASIS Bridge, OASIS offers you individually-designed information management and records retention plans.

OASIS Bridge can be custom-tailored to meet your organisation's records management needs.

Simply contact your OASIS Client Care Team for more information.

2. Login Instructions

- To access OASIS Bridge, navigate to www.OASISGroup.com and click on Client Login (top right of the page).

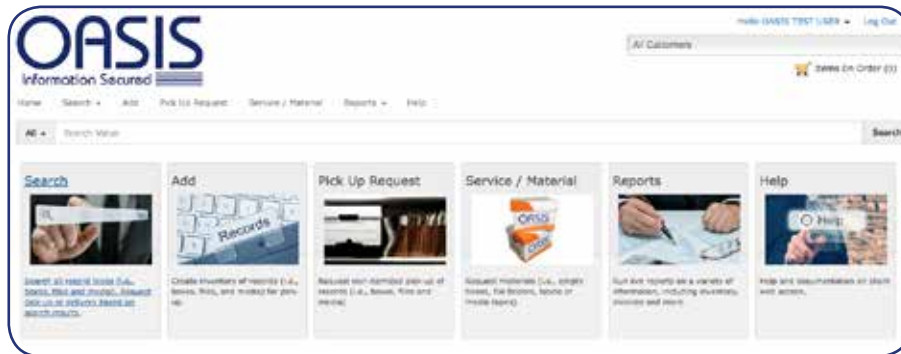


- Enter your Username and Password, click Log In.

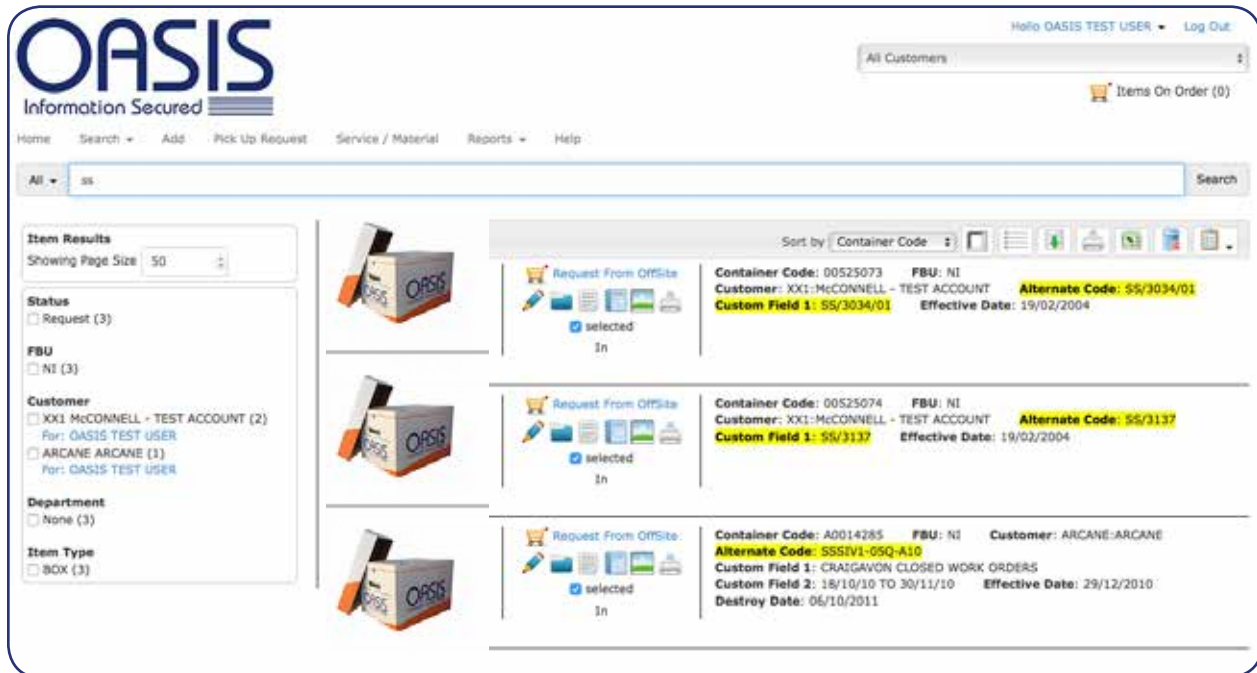
3. Database Searching

Now that your records are safely stored in the OASIS Records Centre, you can use OASIS Bridge to search your stored inventory and submit requests to have items delivered back to your facility.

- To begin a search of the database; simply enter your search criteria into the **Search Menu** bar.

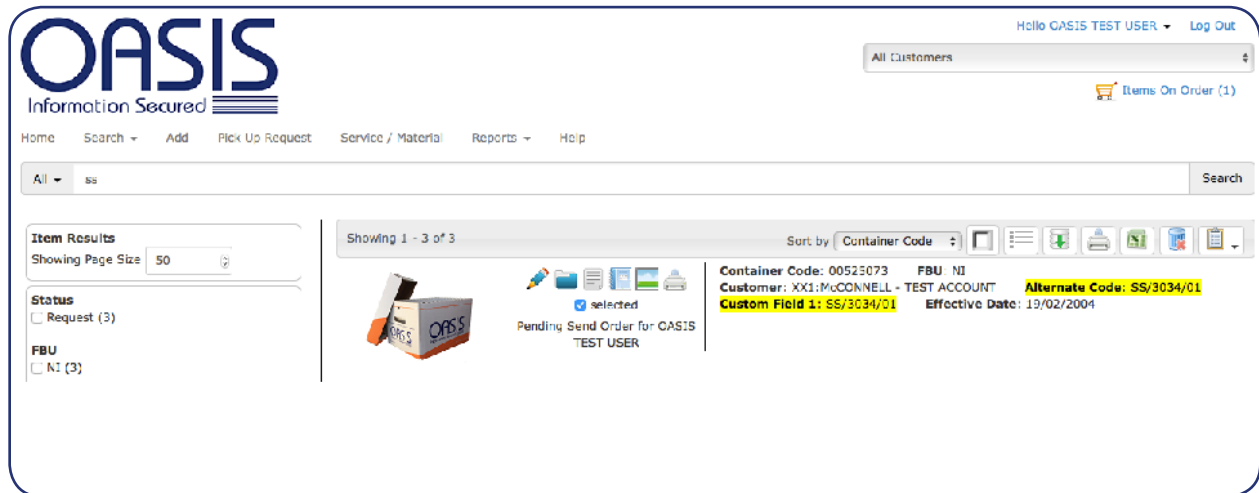


- To run a keyword search, enter a % before the keyword and click **Search**.

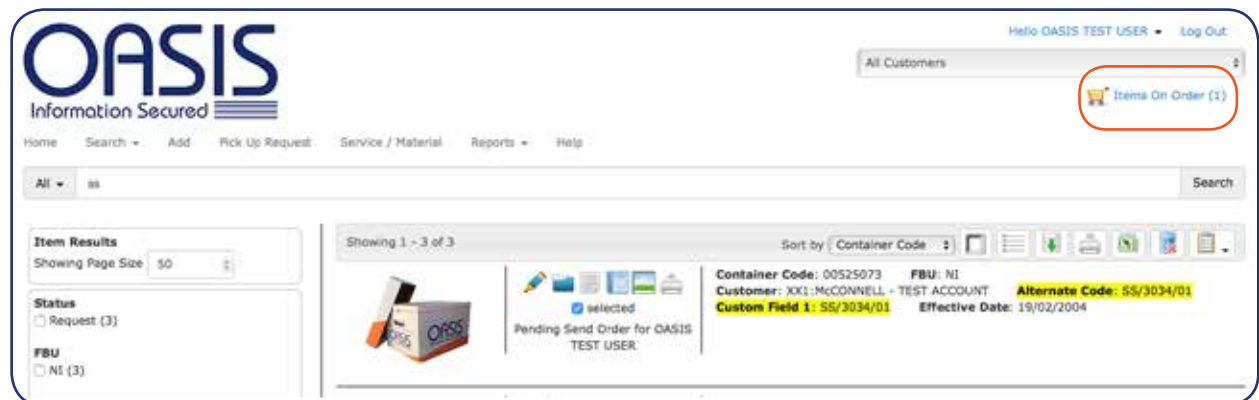


4. Item Retrieval

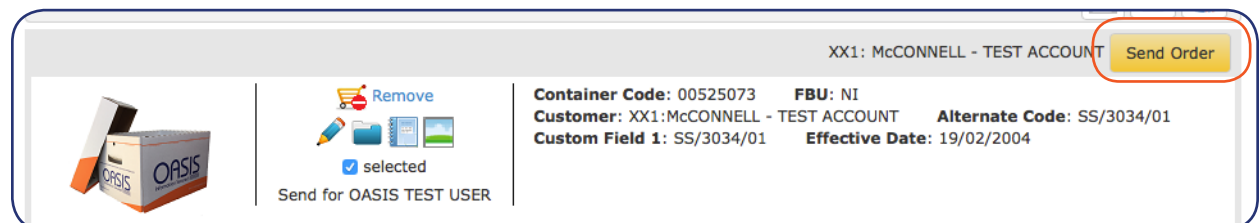
- To request the item(s) for retrieval, click 'Request from Offsite'. The item will be automatically added to your order and the status of the item will change to 'Pending Send Order'.



- Click 'Items on Order' which will bring you to the item checkout screen.



- At the checkout screen, click 'Send Order' to set the delivery requirements.



On this final screen, complete the form by selecting a Delivery Address and Delivery Priority for when you want the delivery made.

- Click 'Send' to send your order through to OASIS.

Complete Send Order

XX1 McCONNELL - TEST ACCOUNT

Delivery Address:

Default Delivery Address: CENTRAL PARK

Select Delivery Address: [Dropdown]

Address: MALLUSK

City: BT36 4FS

State: [Dropdown]

Zip: [Dropdown]

Order Information:

Customer Order Reference: [Text Field]

Charge to Department: [Dropdown]

Select Delivery Priority: Next Day

Comments: [Text Area]

Send Cancel

Your order has now been submitted to the OASIS Records Centre for processing. An order confirmation page will display, which includes your work order number, as well as the date & time in which your order is due.

5. Multiple Database Searches / Delivery Request

Item Results

Showing Page Size: 50

Match Item Search

Customer: NI.ARCANE.ARCANE

Type: BOX

Search Fields: Container Code

Import File: [Text Field] Enter Search Values

File: [Text Field] Browse

File Type: Delimited File

Separator: Comma

Column: A

Header Skip: 0 Footer Skip: 0

Upload

- To run a search for multiple items, the simplest method is to import from a list. Under the **Search** menu, choose the **Match Item Search**.

- Click on 'Import File'. To locate the file on your computer, click 'Browse'. Note, the file must be in .csv format. When you have located the file, click 'Import'. The system will display the results on the screen. To retrieve any or all of the items from your imported list, simply follow the process steps identified in Step 4 for retrieval requests.

6. Supply Orders

- To order supplies, click on **Service / Material** and the following dialogue box will open. Simply select the materials required, enter the quantity, add in any relevant comments and select 'Save'. The order will then be added to the shopping cart.

The screenshot shows a dialog box titled "Service / Material". It contains the following fields and controls:

- Customer:** A dropdown menu with the selected value "NI.ARCANE.ARCANE".
- Department:** A dropdown menu.
- Requested For:** A text input field containing "OASIS TEST USER".
- Service / Material:** A dropdown menu with the selected value "SL-JUM - OASIS Jumbo Box".
- Quantity:** A text input field containing "0".
- Comments:** A text area for entering additional information.
- Buttons:** "Save" and "Close" buttons are located at the bottom right of the dialog.

7. Pick-Up Orders

OASIS Bridge allows you to request a pick-up of boxes or files with just a few simple steps.

- To order a pick-up, click on the **Pick-Up Request** and the following dialogue box will open. Simply enter the item type (Box, File or Tape), the quantity required for pick-up, add in any relevant comments and select 'Save'. The order will then be added to the shopping cart.


Pick Up Items

Customer: NI.ARCANE.ARCANE

Type: BOX

Requested For: OASIS TEST USER

Quantity: 0



Save Close

8. Add Inventory - New Containers / New Files

OASIS Bridge gives you the ability to maintain an inventory of the items you send to the OASIS Records Centre for storage. With just a few quick steps, you will be on your way to ensuring that you have an accurate account of your storage inventory, making future retrievals and reporting that much easier.

- To add new items to your inventory using OASIS Bridge, begin by selecting 'Add' from menu.
- Complete the desired fields in the box and click 'Save'. (Note, the fields presented can be customised for each client).

Add Item

Customer: NI.ARCANE.ARCANE

Department: []

Type: BOX

Requested For: OASIS TEST USER

Retain data entered on add

Container Code: []

Alternate Code: []

Custom Field 1: []

Custom Field 2: []

Custom Field 3: []

Custom Field 4: []

Destroy Date: []

Long Description: []

Indexed Notes: []

Save Close

The data entry template can be customised specifically for the type of data that relates to your records. OASIS Bridge also has the ability to make certain fields mandatory for any information that is critical to your inventory. OASIS Client Care will be happy to assist with any of this customisation.

- Enter the pre-assigned OASIS barcode number. Continue by entering the descriptive information applicable to your records.
- To save your entry, simply click 'Save'.
- Once you have entered all of your new boxes, click 'Items on Order' which will bring you to the item checkout screen.
- Once you have confirmed that the entries you have made are exactly as you wish them to appear in the OASIS database, click the 'Send' button in the command bar.

Complete the final page by making the appropriate selections from the drop down menus.

Please note:

IF YOU DO NOT WISH FOR THE ITEMS TO BE COLLECTED

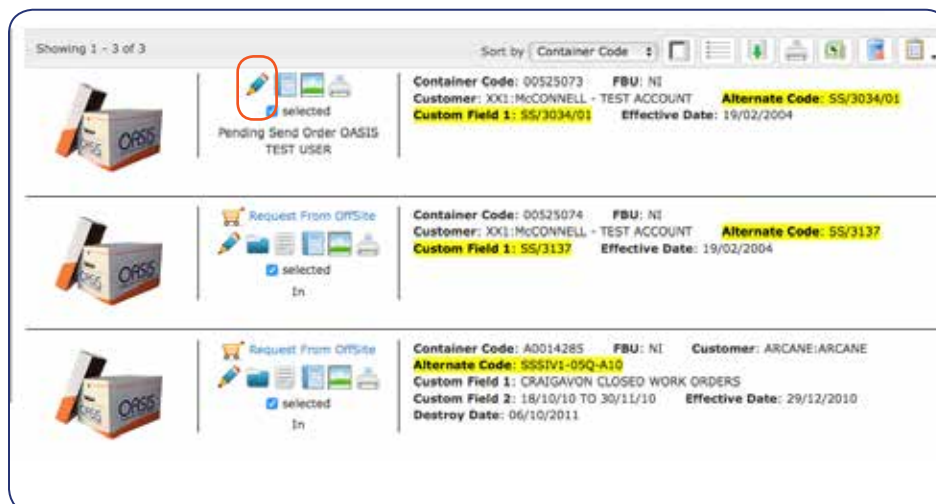
- The delivery priority when entering new data is 'Detailed Indexing'

IF YOU WISH FOR THE BOXES TO BE COLLECTED

- The delivery priority should be set to 'Next Day'

9. Edit Containers / Files

- In order to edit data for a particular item (either file or box), you can simply call up the item in the 'Search' screen and then click the **Edit** icon for the item that you wish to make data changes to.



The following screen will appear to allow you to update the data fields;

The screenshot shows a web-based 'Edit' form for an item record. The form is titled 'Edit' in the top left corner. It contains several input fields and text areas:

- Item Code:** A text box containing the value '01135412'.
- Alternate Code:** An empty text box.
- Custom Field 1:** A text box containing the value 'PALLUCK NO TRACE'.
- Custom Field 2:** A text box containing the value 'RECORDS'.
- Custom Field 3:** A text box containing the value 'X'.
- Custom Field 4:** An empty text box.
- Destroy Date:** A text box containing the date '31/10/2015'.
- Long Description:** A large, empty text area.
- Indexed Notes:** A large, empty text area.

At the bottom right of the form, there are two buttons: 'Save' and 'Close'.

10. Log Out

- To log out of the OASIS Bridge portal, simply click on 'Log Out'.

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