



## Release Notes for dawsonenter – summer 2011

The next release of dawsonenter includes many changes to the way that baskets of orders can be placed and approved.

### Changes to Ordering

If you use dawsonenter for creating your orders but actually place the order with us using some other method (e.g. email), we can arrange for a new button to be displayed alongside the order button that will record the basket as being completed but will not actually place the order.

Please contact Customer Services if you would like to use option.

### Changes to Basket Approval

Total Amount  
62.60

Complete (close) Place Order

If your account uses Approval Levels to place orders or proposals then there are new options available for Recalling, Forwarding and Returning baskets from the Basket Details page as follows:

- There is a new checkbox on the Manage Baskets page that allows approvers to see all baskets that have ever been sent to them for approval.

Basket Status      Completion within

Awaiting Approval      All      Search

Include baskets sent to me for approval

- Recalling

Recall Basket

This button is available to the owner of a basket after it has been sent to an approver.

It resets the basket to an "Open" state allowing for alterations to be made and new titles added or removed.

It is also available to an approver who has requested approval from a higher level or forwarded the basket to another approver of the same level. This may be useful if the new approver is away on holiday or out of the office.

(Note: the "Include baskets sent to me for approval" option must be selected in order to find a basket that has been sent on to another approver)

- Forwarding

This button is available to the approver of a basket.

Forward Approval

It allows the basket to be sent to another approver with the same approval level.

- Returning

## Return Basket

This button is available to the approver of a basket.




In the previous system, an approver is only able to either approve or reject a basket. This can cause problems if there are errors with the items in the basket (e.g. wrong Fund Code used). It allows the basket to be returned to the owner (or previous approver).

If returned to the owner then the basket is reset to an "Open" state allowing for alterations to be made and new titles added or removed.

- The history of a basket has been improved to show the full details of a basket's approval journey.

Just click the  image to open up the full details, along with approver comments:-

Change page: < 1 >

Approver notes	Basket Name	Type	Basket Note	Fund
	 Test Chaining II	Proposal		
User	Status	Date		
Mr Kelvin Lush	Open	24/08/2011		
Mrs Hetty Wainthropp	Awaiting Approval	24/08/2011		
 Mrs Hetty Wainthropp	Returned	24/08/2011		
Mr Kelvin Lush	Open	24/08/2011		
Mr Arthur Daley	Awaiting Approval	30/08/2011		

If your account uses multiple Approval Levels to place orders or proposals then there is a new option to allow users to approve or reject any basket that is awaiting approval by staff with a lower approval level.

This option is switched on from the User Set-up/Assign Rights page:-

Set up user rights for: ....

User can access:  User can access Invoice Number  Purchase Order Codes

Menu:  Baskets  Order Enquiry

This User can place

Orders  Proposals  Blanket Orders

14 Maximum number of copies of a title that can be ordered

**Approval Level**

Your account has 3 approval levels.  
Only users with Approval Level 3 can send baskets to Dawson

Approval level for this user 3

User can approve baskets sent to someone else of the same or lower approval level

**Baskets must have**

## Changes to Purchase Order Codes

If your account uses purchase order codes then the previous system could cause problems where users were able to leave codes blank.

Now, the Account Manager has the ability to mark the various code types as being mandatory. This is set in the Account Manager page, under the General tab:-

### Display Purchase Order Codes

Compulsory Codes:

- Fund
- Location
- Stock Category
- Sequence

The Purchase Order Code grid for each item in a basket is then validated to ensure that compulsory codes have been provided. Missing codes are highlighted in the grid as follows:-

Item Reference  Quantity

Quantity	Fund	Location	Stock Category	Sequence
<input type="text" value="1"/>	<input type="text"/>	<input type="text" value="Location 2"/>	<input type="text" value="stock type 3"/>	<input type="text" value="Sequence 4"/>

This is a required field

## Adding items in reading lists to a basket

The previous system allowed reading lists to be added to a basket using the Bulk Upload page but the entire list had to be imported.

Now there is the ability to "cherry pick" individual titles from a reading list and add them to any basket.

Open up a title from the List Details page and there is a new dropdown list at the top left of the page allowing the user to select a basket or create a new one:-

[Home](#) > [Lists](#) > [Title List Details](#)

### Item Notes

## Download of Basket Details

The excel spreadsheet created for the download of basket details now shows the correct Order Quantity along with an estimated line value.

## Standing Order Billing Enquiries

Provided that a user has been granted the permissions to make Order Enquiries and the Standing Order permission "User can search Standing Order Orders", the Order Enquiry – Billing Details page can be used to search for Standing Order invoices:-

[Home](#) > Order Enquiry - Billing Details

Invoice Address



Delivery Address

Document Number

From

To

Change page: [1](#) [2](#) [3](#) [4](#)

Document Number	Date	Document Type
 S1421612	02/07/2009	Invoice
 S1420654	01/07/2009	Invoice

If the appropriate permissions have been granted then parcel tracking information and Invoices can be viewed online.

