Admin Portal User Guide

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**eBook Collection**

The eBook Collection lists all of the titles owned by your institution.

The collection shows the following information:

- eISBN
- Title
- Publisher
- Publication date
- Number of copies
- Start credits – number of credits purchased
- Credits remaining – number of credits remaining before they are reset
- Expected expiry – date the credits are expected to run out (based on usage rate)
- Renewal date – date the credits will be reset (based on the anniversary of the purchase)
- Purchase model - whether the title purchased is the credit model or managed user access (MUA)
- Max concurrent – number of users allowed for managed user access
- Fund code – if a fund code has been allocated to an order it will display here
- Availability – administrators can choose to withdraw titles from the reader portal by clicking “withdraw.” Should they wish to be made visible again, simply click “make available”
Use the “go to” option to jump to a title in the collection.

All column headers are sortable.

Clicking on a title will take the user through to the full title display.

<table>
<thead>
<tr>
<th>Title</th>
<th>eISBN</th>
<th>Publisher</th>
<th>Publication Date</th>
<th>Start Credits</th>
<th>Credits Remaining</th>
<th>Expected Expiry</th>
<th>Renewal Date</th>
<th>Purchase Model</th>
<th>Max Concurrent</th>
<th>Fund Code</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principles of surgery, 7th Edition, companion handbook</td>
<td>9780071375095</td>
<td>McGraw-Hill USA</td>
<td>01/09/08</td>
<td>1</td>
<td>289</td>
<td>300</td>
<td>31/01/14</td>
<td>0</td>
<td>0</td>
<td>Withdraw</td>
<td></td>
</tr>
<tr>
<td>Principles of surgery, 7th Edition, companion handbook</td>
<td>9780071375095</td>
<td>McGraw-Hill USA</td>
<td>01/09/08</td>
<td>1</td>
<td>341</td>
<td>341</td>
<td>31/01/14</td>
<td>0</td>
<td>0</td>
<td>Withdraw</td>
<td></td>
</tr>
<tr>
<td>Principles of surgery, 7th Edition, companion handbook</td>
<td>9780071375095</td>
<td>McGraw-Hill USA</td>
<td>01/09/08</td>
<td>1</td>
<td>380</td>
<td>390</td>
<td>31/01/14</td>
<td>0</td>
<td>0</td>
<td>Withdraw</td>
<td></td>
</tr>
<tr>
<td>Basic engineering processes technology</td>
<td>9780073620169</td>
<td>McGraw-Hill Professional</td>
<td>03/07/08</td>
<td>1</td>
<td>400</td>
<td>400</td>
<td>31/01/14</td>
<td>0</td>
<td>0</td>
<td>Withdraw</td>
<td></td>
</tr>
<tr>
<td>The beauty diet: looking good has never been so delicious!</td>
<td>9780071375095</td>
<td>McGraw-Hill USA</td>
<td>02/08/08</td>
<td>1</td>
<td>400</td>
<td>400</td>
<td>31/01/14</td>
<td>0</td>
<td>0</td>
<td>Withdraw</td>
<td></td>
</tr>
<tr>
<td>856 URL – direct/WAYFless link to the title</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Administrators can download the eBook collection into Excel. This export contains the following information:

- Title
- eISBN
- Publisher
- Copies
- Start credits
- Credits remaining
- Expected expiry date
- Renewal date
- Fund code
- Availability
- 856 URL – direct/WAYFless link to the title
Advanced Search

Enter a keyword, title, author or ISBN into the search term field.

You can choose to search across the full text (all bibliographic information and the contents of the book) or the metadata (just bibliographic information).

It is also possible to search across content just owned by your institution, content not purchased and content which has been withdrawn by administrators.

A more detailed search can be performed using the advanced options:

- Author
- Title
- Subject (based on BIC codes)
- Publication date
- Date title uploaded to the site
- Publisher
- Library of Congress classification
- Dewey Decimal Classification
- National Library of Medicine classification
- ISBN – 10 or 13 digit can be used
- eISBN – 10 or 13 digit can be used

It is possible to search across multiple publishers by highlighting them and clicking select.
By entering a **common word** such as medicine, many results will be displayed. By entering a less common word such as rheumatism, the results will be fewer.

In the keyword field, you may also **enter a phrase** such as rheumatoid arthritis. The search process will find all eBooks containing both the words rheumatoid and arthritis. However, the search will find them whether they are next to one another or not. To ensure that the **exact phrase** rheumatoid arthritis only is returned from your search, enter your search term inside **quotation marks** e.g., “rheumatoid arthritis”.

A principle worth remembering is that to **narrow your search** you may use the ‘**operator**’ **AND**. For example, if you are looking for diseases of the potato but your search term potato produces too many results, achieve more precision by re-entering potato **AND** blight.

In a similar way, to **broaden your search** you may use the ‘**operator**’ **OR**. For example, if you want to be sure you have discovered all relevant eBooks about Burma you should consider entering the term Burma **OR** Myanmar. Then eBooks mentioning either Burma, or its alternate name Myanmar will be found.

If you know that by entering a particular search term, some related but non-relevant eBooks are likely to be found, you may exclude these at the outset by using the **operator NOT**. For example, if you are researching Emily Bronte, but are less interested in her sister you could enter Bronte **NOT** Charlotte.

To be absolutely sure that you get only eBooks mentioning Emily, you can group her full name inside brackets before the **NOT operator** like so: (Emily Bronte) **NOT** Charlotte.
Search Results
The search results contain ten titles per page with a navigation bar at the top to browse the rest of the results. Clicking on a title will take you through to the full title display (see full title display section).

Search results can also be downloaded to Excel.

The following information is contained in the export:

- eISBN
- ISBN
- Title
- Author
- Edition (if applicable)
- Publication date
- Price (in GBP)
- Credits
- Dewey Decimal Classification
- Library of Congress classification
- Description
Full Title Display

The full title display contains the bibliographic information listed below. There is also a navigation control on the full title display, allowing you to navigate from one search result to the next, and to return to the list of search results.

Study skills : maximise your time to pass exams
John Kennedy.

- Title
- Author(s)
- Jacket Image
- Number of Pages
- Publisher
- Publication Date
- Price
- 10 & 13 digit eISBN
- 10 & 13 digit ISBN
- Direct URL Link (Marc record 856 tag)
- Description
- BIC Classification
- Dewey Decimal Classification
- Library of Congress Classification
- View related titles
- View title in OPAC
- COUNTER Report
The related titles are displayed in a carousel of jacket images. This is based on DDC.

For titles not owned by your institution, there is a 5 minute preview option below the related titles carousel.

There is also the option to add the title to a batch. Simply select the number of copies required and select the batch you wish to add it to. If you don’t have an existing batch, you can create a new one. Please see the acquisitions section for more information.
Acquisitions

My Batches lists the administrator’s existing batches, alongside their status, and the option to create a new batch.

- Open – new order awaiting submittal
- Awaiting approval – awaiting authorisation from administrator with the right to approve orders
- Exported – order sent to Dawson for provision

To begin a new batch, click on create batch. Administrators can add a batch name, fund code, purchase order and comments before clicking create batch. The fund code and purchase order number will be transmitted to Dawson and will appear on the invoice. Comments are for use between administrators only.

To edit/submit a batch, click on the batch title to open the screen on page 11.
Administrators can edit the batch name, fund code, purchase order number, comments and edit the titles contained within the batch before submitting it. To remove a title from a batch, highlight the checkbox next to the title and click “remove selected.”

To finalise your order, click “submit match.”

**Approving Batches**

Super users or administrator have the permission to approve batches for purchase. To approve the batch, click on the title to open the window below:

Administrators can view the batch details, and have the opportunity to amend or add a fund code, purchase order number and comments. Click update to save the changes. Once finalised, click “approve.”
Rental Approvals

The rental approvals page displays rental requests made by readers. It provides information about the rental request:

- Title
- Date of request
- Requester (username)
- Rental period requested (1, 2 or 3 weeks depending on Admin Portal settings)
- Status (owned or not owned)
- Number of previous rentals

To open a rental request, click on a title from the list.

If a title is approved or decline, the requestor will receive an email notification. It will also appear in the “My Account” section under "rentals available to user.”

This section details bibliographic information and allows you to link to the Full Title Display for further information.

The requestor, request date and library card ID are also provided.

Status
Details if the title is owned or waiting in a batch to be purchased.

Rental Period
The end user can choose either 1, 2, or 3 weeks. You may change the requested period for the ebook by clicking on the dropdown menu and selecting a different period. This automatically affects the rental price.

Fund Code/Purchase Order Number
If you approval the rental, the option to add a fund code or purchase order number is available.

Purchase/Rental price & Previous Rentals
This provides the price of the rental and the price to purchase the ebook. Rental prices are subject to the publisher but our guideline is based on 9%, 16% and 33% of the publisher’s list price. Previous rental requests for this title will also be displayed.

Options
You can approve the rental, decline the rental or purchase the ebook by clicking on ‘add to batch’.
Purchase Suggestions

The purchase suggestions page lists all of the titles which suggested for purchase by readers. The following information is provided:

- eISBN
- Title
- Date of last request
- Number of requests
- Whether the title is owned or not

Click on a number in the “requests” column to bring up a pop-up window containing further information about the suggestion:

- Date requested
- Email address of user
- Comments

Click on “delete” to remove the request from the table.

Fast Order Entry

The fast order entry screen allows administrators to quickly enter eISBNs into a batch, without having to go through the full title display screen.

The system will use the latest created batch as default. If you wish to start afresh, click on “create batch” or select a batch from the drop down menu and click “edit batch” to amend details.
To add items to a batch enter a valid eISBN and click “add to batch.”

If the fund code and purchase order number are mandatory (please see Admin Portal Configuration), these will be required before continuing.

Items added to the batch will appear in a table below.

Administrators can amend each item in the batch by clicking on “edit.” This will open a new window, where the number of copies, fund code, purchase order number and notes can be edited.
Alternatively, administrators can edit the number of copies in the main screen by changing the quantity and clicking “update.”

Titles can also be deleted from the batch by highlighting “remove” on the title and then “update.” Once the batch is completed, navigate to Acquisitions> My Batches, select the required batch by clicking on the batch title and then “submit batch.”
Usage Report

Administrators can run a report on usage across their account from here. The report can be refined by the following options:

- Date range
- Publisher/imprint
- Usage types
  - Read online
  - Downloads
  - Rentals accepted
  - Rentals declined
  - Rentals read online
  - Rentals downloaded
  - 5 minute preview
- Subject keyword
- Title
- Dewey
- Library of Congress Classification
- eISBN
- BIC code
- Fund code

Tick “all usage types” to report across online reads, downloads, rental and 5 minute previews.

The report can be viewed online or downloaded to Excel.

Depending on the criteria you have selected, the usage report will display the following information in the field headers:

- Date
- eISBN
- Title
- Publisher
- BIC
- Dewey
- LCC
- Keywords
- Type – Usage type, i.e. read online, download, preview
- Pages Accessed – number of pages turned
- Minutes – number of minutes spent reading
- Purchase Model – credit model or managed user access
- Credits Remaining – number of credits remaining for the year
- User type – reader or administrator
Financial Report

The financial report gives administrators the opportunity to look at the institution’s eBook purchases for a specified date range and purchase type. The report can be refined by the following options:

- Date range
- eBook purchase / rental or both
- Purchase order number
- Fund code
- Invoice number
- eISBN

The report can be viewed online or downloaded to Excel.

The report will show the following information:

- Invoice date
- Invoice number
- Fund code
- Type
- eISBN
- Author
- Title
- Publication date
- Purchase model
- Edition
- Price
COUNTER Report 1

This report generates the number of successful title requests by month and title. A link to this report may also be located on the eBook full title display.

To display all usage data leave the eISBN field empty or to view results for a particular title enter the eISBN.

The report can be viewed online or downloaded to Excel.

The usage report will display the following field headers:

- Title
- Publisher
- Platform
- ISBN

The report will also tally:

- Number of accesses per month, per title
- Year to date totals

<table>
<thead>
<tr>
<th>Title</th>
<th>Publisher</th>
<th>Platform</th>
<th>ISBN</th>
<th>Jan-2013</th>
<th>Feb-2013</th>
<th>YTD Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total for all titles</td>
<td></td>
<td></td>
<td></td>
<td>99</td>
<td>234</td>
<td>333</td>
</tr>
<tr>
<td>2D green projects for the evil genius</td>
<td>McGraw-Hill/Education</td>
<td>dawsonera 9780073249900</td>
<td>5</td>
<td>6</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>Advanced applications in acoustics, noise and vibration</td>
<td>Springer</td>
<td>dawsonera 97802053645130</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Advances in Higrometry</td>
<td>Academic Press</td>
<td>dawsonera 9780080460196</td>
<td>0</td>
<td>3</td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>

COUNTER Report 2

This report generates the number of successful section requests by month and title.

To display all usage data leave the eISBN field empty or to view results for a particular title enter the eISBN.

The report can be viewed online or downloaded to Excel.

The usage report will display the following field headers:

- Title
- Publisher
- Platform
- ISBN

The report will also tally:

- Number of page requests per month, per title
- Year to date totals

<table>
<thead>
<tr>
<th>Title</th>
<th>Publisher</th>
<th>Platform</th>
<th>ISBN</th>
<th>Jan-2013</th>
<th>Feb-2013</th>
<th>YTD Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total for all titles</td>
<td></td>
<td></td>
<td></td>
<td>273</td>
<td>731</td>
<td>994</td>
</tr>
<tr>
<td>2D green projects for the evil genius</td>
<td>McGraw-Hill/Education</td>
<td>dawsonera 9780073249900</td>
<td>11</td>
<td>18</td>
<td>29</td>
<td></td>
</tr>
<tr>
<td>Advanced applications in acoustics, noise and vibration</td>
<td>Springer</td>
<td>dawsonera 97802053645130</td>
<td>4</td>
<td>4</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Advances in Higrometry</td>
<td>Academic Press</td>
<td>dawsonera 9780080460196</td>
<td>0</td>
<td>4</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Advances in computer-supported learning</td>
<td>Information Science Publishing</td>
<td>dawsonera 9781945015579</td>
<td>25</td>
<td>10</td>
<td>35</td>
<td></td>
</tr>
</tbody>
</table>
COUNTER Report 6

This report generates the total number of searches ran and login sessions per month.

<table>
<thead>
<tr>
<th>Service</th>
<th>Publisher</th>
<th>Platform</th>
<th>Type</th>
<th>Jan-2012</th>
<th>Feb-2012</th>
<th>FTD Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>dawsonera</td>
<td>Dawson Books</td>
<td>dawsonera</td>
<td>Searches run</td>
<td>47</td>
<td>119</td>
<td>156</td>
</tr>
<tr>
<td>dawsonera</td>
<td>Dawson Books</td>
<td>dawsonera</td>
<td>Sessions</td>
<td>252</td>
<td>491</td>
<td>743</td>
</tr>
</tbody>
</table>

Popular Books Report

The popular books report aggregates the usage statistics for the following:

- Books read online
- Downloads
- Previews
- Pages read

There is a further option to see how many copies of a title the institution owns.

These reports can be refined by a date range and downloaded to Excel. The following information is included in the report:

- eISBN
- Title
- Publisher
- Purchase model
- Date title uploaded to dawsonera
- Books reads/downloads/previews/pages accessed/copies owned

<table>
<thead>
<tr>
<th>ISBN</th>
<th>Title</th>
<th>Publisher</th>
<th>Purchase model</th>
<th>Date Added</th>
<th>Book Reads</th>
</tr>
</thead>
<tbody>
<tr>
<td>0864438870003</td>
<td>Accounting and Finance</td>
<td>Pearson Education</td>
<td></td>
<td>2007-12-12</td>
<td>48</td>
</tr>
<tr>
<td>9780230410780</td>
<td>Alcohol problems in the community</td>
<td>Routledge Ltd</td>
<td></td>
<td>2007-09-16</td>
<td>31</td>
</tr>
<tr>
<td>9781841050690</td>
<td>Aliens, Alice</td>
<td>Intellect Books</td>
<td></td>
<td>2008-02-04</td>
<td>12</td>
</tr>
<tr>
<td>9781441298090</td>
<td>British Anarchist Tradition</td>
<td>Continuum</td>
<td></td>
<td>2011-06-02</td>
<td>9</td>
</tr>
</tbody>
</table>

Purchase Suggestions Report

This report lists all of the titles which have been suggested for purchase by users in the Reader Portal. The report can be refined by the following:

- Date range
- Title
- eISBN
- Subject
- Minimum number of suggestions
- Whether the title is owned or not
The report can be generated within the browser or downloaded to Excel.

The information below is included within the report:

- Date
- eISBN
- Title
- Purchase model
- Subject
- Owned?
- Username

**PDA Report**

The PDA report shows aggregated usage statistics for titles purchased via PDA, alongside financial information. The following criteria can be used to refine the report:

- Date range
- Title
- e/ISBN
- Invoice number

Administrators can choose to include the following information:

- Downloads
- Online reads
- Publisher
- Dewey Decimal Classification

The report can be generated within the browser or downloaded to Excel. The report contains the information below:

- Acquisition date
- eISBN
- Title
- No. of purchase suggestions
- No. of previews
- No. of rentals
- No. of online reads
- No. of downloads
- Invoice number
- Price
- Purchase model
- Fund code
MUA Report

The managed user access report aggregates usage statistics for MUA owned titles, to show the demand for each. The report can be filtered by date range to show the following information:

- eISBN
- Title
- Number of checkouts – online reads and download stats combined
- Number of previews
- Number of 24 hour rentals
- Max concurrent users
- Current queue for the title (shown in real-time)
Admin

Create Users

Readers

To create a user for the Reader Portal, select Reader from the drop down menu and fill in the following information:

- **Select role**
- **Forename**
- **Surname**
- **Email address**
- **Username** – must be unique and 5 characters or more
- **Password** – must be 6 characters or more
Super administrator users have the ability to approve rental requests, withdraw eBooks and create reader portal accounts as default.

Super Administrators vs. Administrators

<table>
<thead>
<tr>
<th>Function</th>
<th>Super Administrators</th>
<th>Administrators</th>
</tr>
</thead>
<tbody>
<tr>
<td>Withdraw eBooks</td>
<td>✓</td>
<td>Configurable</td>
</tr>
<tr>
<td>Create Reader Portal users</td>
<td>✓</td>
<td>Configurable</td>
</tr>
<tr>
<td>Bulk upload</td>
<td>✓</td>
<td>X</td>
</tr>
<tr>
<td>Edit &amp; login as existing users</td>
<td>✓</td>
<td>X</td>
</tr>
<tr>
<td>Reader Portal configuration</td>
<td>✓</td>
<td>Read only</td>
</tr>
<tr>
<td>Admin Portal configuration</td>
<td>✓</td>
<td>Read only</td>
</tr>
<tr>
<td>Approve rental requests</td>
<td>✓</td>
<td>Configurable</td>
</tr>
<tr>
<td>Upload inclusion list</td>
<td>✓</td>
<td>X</td>
</tr>
</tbody>
</table>
**Bulk Uploads**

It is possible to upload multiple users at a time using the bulk upload feature.

Download the template spreadsheet in the bottom right-hand corner.

The following fields are contained within the spreadsheet. Items marked with an asterisk are mandatory. If no role is specified, it will default to **reader**.

- Username*
- Password*
- Group
- Surname
- Forename
- Email address*

Please note the file must be saved as **.xls**.

Select the saved file by using “browse” enter your email address and then click “upload.”

To update existing users, select the update option. To remove users, select delete.

Users should be uploaded to the site within the hour. Should there be a problem with the upload, administrators will receive an email (to the specified email address) detailing the problem.
**Users**

All users created on the site are listed on this page, where they can be viewed, edited and deleted. Please note, this list does not include Athens, Shibboleth or EZproxy users. The following information is displayed for each user:

- Username
- Role
- First name
- Surname
- Date created
- Date of last login
- Email address

Find users by utilising the search function or the A-Z navigation bar.

Click on “edit” to view and edit the user’s details.
In this screen administrators can edit all of the user’s details or delete the user entirely.

Super administrators have the ability to login as users with fewer rights than them, i.e. readers and administrators.
The following screen will be presented before being logged in as the specified user. Select “OK” to continue.

**Reader Portal Configuration**

**Rentals**

- **Allow rentals**
  - Enable rentals in the Reader Portal

- **Rental types**
  - **Institution** – Library pays for approved rentals
  - **Student** – User can pay for a rental on their credit card

- **Max rental period**
  - No. of weeks a title can be rented for – 1, 2 or 3 weeks

- **Rental auto-approval limit**
  - No. of times a title can be automatically approved for rental before manual intervention is required

- **Max price for auto-approved rentals**
  - Price parameter for auto-approved rentals

- **Rental budget limit**
  - Set a limit for rentals and see how much of the budget is remaining.
  - Admin users are notified when limit is reached

- **Rental reference text**
  - Text entered here appears in the rental request form in the Reader Portal. This is not a mandatory field

- **Enable rental notification emails**
  - If selected, emails are sent to any admin users who can approve rentals once one has been requested

---

**Bertram Group**
Reader Portal Preferences

Alert/Info Text

Administrators can add their own news and updates to the Reader Portal by using the Alert/Info text box in the Reader Portal Preferences.

Max download days –
Set the max no. of days a title can be downloaded for (1-7)

Display unowned content - Show content not owned by the institution

Default to show unowned content in catalogue - Display all content in the eBook Collection. If unticked, only owned content will be displayed in the eBook Collection

Allow preview of unowned content - Allows users to have free 5 minute preview of content not purchased

Allow purchase suggestions - Allow users to suggest titles for purchase

Logo URL - Image location URL of logo displayed in top right-hand corner

To add an image click here, which will open the following page:
Add the image URL and click “insert.” To find the image URL, locate the image that is to be used and right click on it and select “copy image URL.”

To hyperlink text, type text into the box, highlight it, right click and then select “insert/edit link.”
This will open the following screen where the URL details can be added.

- **Link URL** – website address
- **Target** – Select where the site will open, e.g. new window/tab
- **Title** – Text that is displayed when link is hovered over

To preview the changes, click on the magnifying glass icon:

The text/images entered here will display on the logged-in home page.
OPAC Resolver
Add the institutional OPAC resolver here. This will allow users to utilise the “find in my library” option on the full title display in both the Reader Portal and Admin Portal. Clicking on “find in my library” searches for the title the user is looking at in dawsonera, in their own library catalogue.
Patron Driven Acquisitions Set-Up

Enable PDA
- Allows titles to be purchased automatically after 5 minute preview elapses if the user chooses to continue reading
- Allow titles to be auto-purchased if the user selects a title for purchase
- Allow titles to be auto-purchased based on the number of users in the queue for MUA titles
- Set number of users in queue before titles is auto-purchased. Entering “2” would mean it would be purchased when the third user joins the queue

Enable auto-purchase of ebooks
Allow auto-purchase following preview expiry
Allow auto-purchase based on managed concurrent access queue size
Managed concurrent access auto-purchase queue size threshold
Enable batch creation if PDA limit exceeded
Maximum price for auto-purchases
Activate PDA Budget Limit
PDA Budget Limit
Remaining PDA budget (last reset: 05/03/2013)

Set overall budget limit for PDA. Administrators will be notified when the remaining budget hits 50.00 GBP
Set overall budget limit for PDA. Administrators will be notified when the remaining budget hits 50.00 GBP
Set maximum price for auto-purchases. Administrators will be notified if an auto-purchase is triggered over this limit

Administrators can build their own rules for Patron Driven Acquisition. If you wish to have several triggers leading to an auto-purchase you can take advantage of the AND/OR rules outlined below. If you choose to have only one trigger, i.e. 2 previews, leading to an auto-purchase, just add in a single line rule. The rules are grouped as follows: (Rule 1 – operator (Rule 2 - operator – Rule 3)).
**Managed User Access**

The managed user access settings allow administrators to configure the queuing process for MUA titles in the Reader Portal.

- **Maximum reservation period**
  This states for how long, in hours and minutes, one student can "borrow" the book for in one loan. After the loan is finished the next user in the queue gets offered the title. If the reservation period is set for less than 12 hours, the download option will be disabled. If it’s set to above 12, it will be rounded to the nearest whole day.

- **Maximum loan period**
  This states how long after the user has been notified by email, that the book will be held for them to access the book before it is offered to the next user in the queue.

- **Maximum amount of times a user is offered a title**
  This denotes the maximum amount of times a user is offered the chance to read the title before being removed from the queue.
Admin Portal Configuration

- **Credit expiry warning limit** – Once a title’s credits run down to the amount specified here, an email alert is sent out to notify the administrator.

- **Warning limit recipients** – List the email addresses the above notification should be sent to:
  - felicity.kilshaw@dawsonbooks.co.uk

- **Currency to display** – The currency specified here will show in brackets on the full title display. The following currencies can be selected:
  - GBP
  - Danish Krone
  - Euros
  - Norwegian Krone
  - Swedish Krone
  - US Dollars

- **Email summary of suggested purchases from users every week** – A weekly report of aggregated purchase suggestions is sent out to a named contact. If you would like to amend the contact that this is sent to, please contact enquiries@dawsonera.com

Batch configuration

- **Order confirmation text** – The text entered here will be included on the batch order confirmation email (summary of titles ordered).

- **Order confirmation recipients** – Add the email address of administrators who should receive the batch order confirmation email.
- **No. of approval levels** – specify the number of levels of approval an order must go through before a batch is submitted. Administrators can be set up with varying approval level authentication in the user screen (Admin>Users)
- **Batch fund code and purchase order number required?** – Enabling this option makes the batch fund code and purchase order number on the batch entry screen mandatory
- **Enable batch notification emails** – Send batch confirmations to recipients outlined in “order confirmation recipients”

**Edit Available Content**

Administrators can choose to suppress content displayed in the Reader Portal by selecting from a list of Dewey Decimal Codes and publishers. Only those highlighted will be visible to users in the Reader Portal. Please note, this does not affect content already purchased.
Upload Inclusion List

The “upload inclusion list” feature gives administrators the ability to upload a list of eISBNs for inclusion in the Reader Portal; all other content will be suppressed. It is also be possible to add a fund code to each title, which will be visible in the PDA report. The fund codes should be added to column K.

More commonly, this list will have been generated as part of a PDA profile. For more information on this, please contact enquiries@dawsonera.com

The edit available content option will work in conjunction with this. Please note, settings in edit available content will take precedence over the uploaded list.

- Click on “browse”, select the file and press “upload”

- If there are any problems, a list of eISBNs, which haven’t been uploaded, will be displayed.
- If a list has already been uploaded, you will be notified at the top of the screen. To remove the list, simply click on “reset”