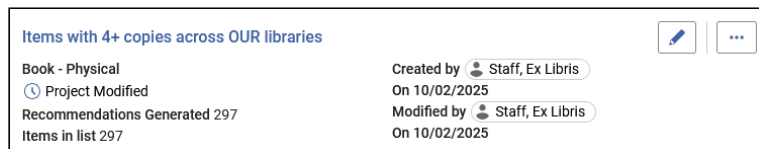


Managing Collection Development Projects

This guide explains how to manage collection development projects. You will learn how to navigate project lists, understand project statuses, and use key features such as searching, sorting, cloning, deleting, and completing projects.

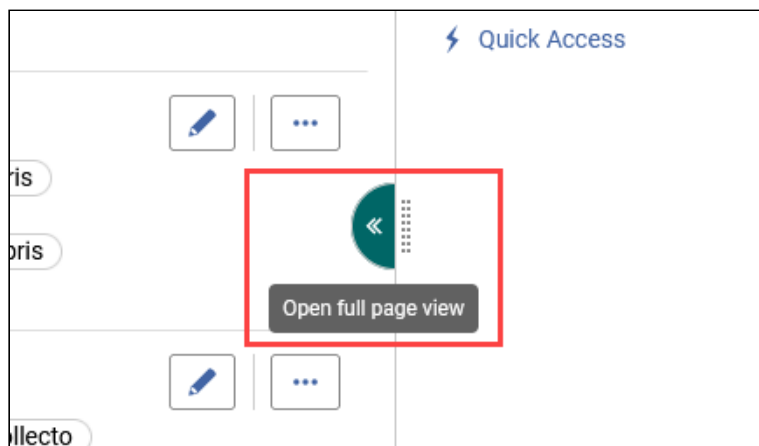
All created projects are visible in the list on the left side of workflow pages (**Collection Development > Workflows > Retention** for Retention and **Collection Development > Workflows > Deselection** for Deselection). The list displays high-level information about each project, including:

- Project title
- Resource types
- Project status
- Number of generated recommendations
- Number of unresolved items (**Items in list**)
- Creation date
- User
- Last modification date



Project-level details

To expand the project list to fill the entire screen, select the five-line button at the top right. Otherwise, the **Criteria form** for the selected project appears on the right side of the screen.



The button for a full-screen project list

Project Statuses

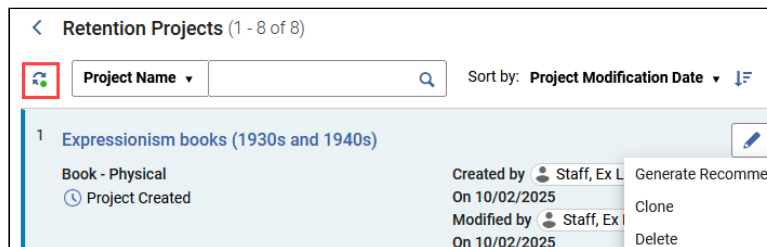
Each project has a status that reflects its stage in the workflow. Available statuses include:

- **Project Created** – The project has been created, but recommendations have not yet been generated. If a project has this status, its main action (i.e., the one at the top of the options when you select the three-dot menu) is **Generate Recommendations**.
- **Generating Recommendations** – The system is currently generating recommendations. If a project has this status, its main (and only available) action is **Clone**.
- **Recommendations Generated** – Recommendations have been generated and are ready for review. If a project has this status, its main action is **View Recommendations**.
- **Review in Process** – Recommendations have been generated and viewed. If a project has this status, its main action is **View Recommendations**.
- **Project Modified** – The project’s criteria have been updated, so users need to regenerate recommendations to get an updated list of items. If a project has this status, its main action is **Regenerate Recommendations**.
- **Project Completed** – The project has been marked as complete by the user. If a project has this status, its main action is **Clone**.
- **Generation Failed** – The recommendation generation process did not finish successfully. If a project has this status, its main action is **Generate Recommendations**.

Note

For detailed instructions on working with recommendations, see the guides for [Managing Retention Recommendations](#) and [Managing Deselection Recommendations](#).

Project status changes become visible only after you refresh the project page.



The refresh button

Searching and Sorting Projects

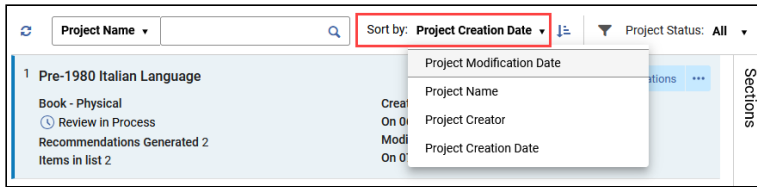
Use the search bar at the top of the list to quickly find the project you are looking for. You can search by either project name or project creator.



Project search bar

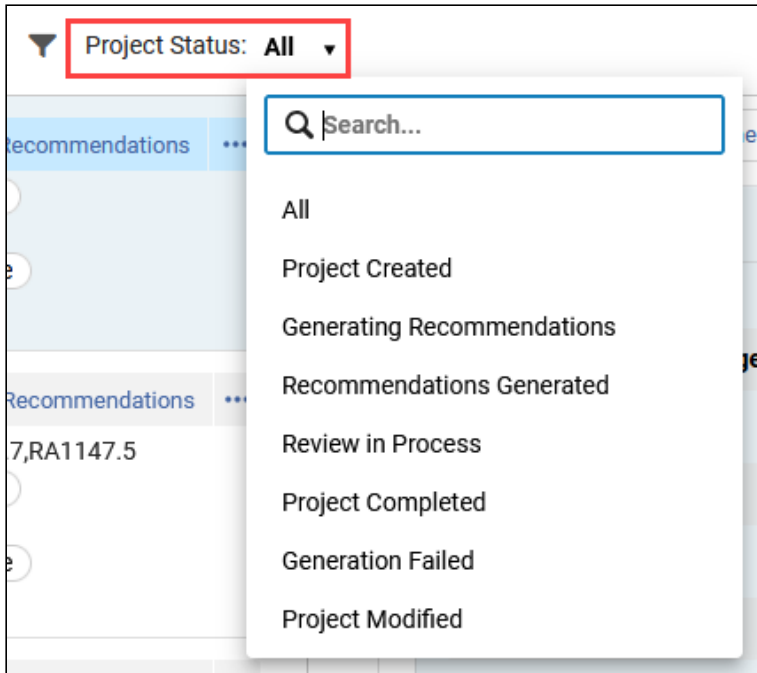
You can also control the order of projects in the list. Select the **Sort by** dropdown menu to organize projects by:

- Last modification date
- Project name
- Creator name
- Creation date



Sorting projects

The **Project Status** filter allows you to show only projects that match a specific status. By default, this filter is set to **All**.

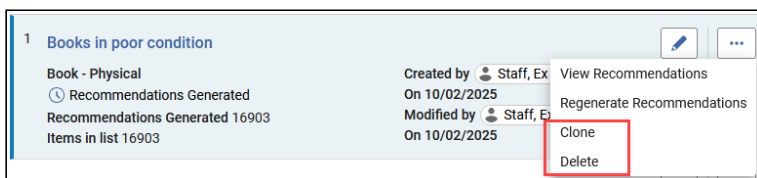


The Project Status filter

Cloning and Deleting Projects

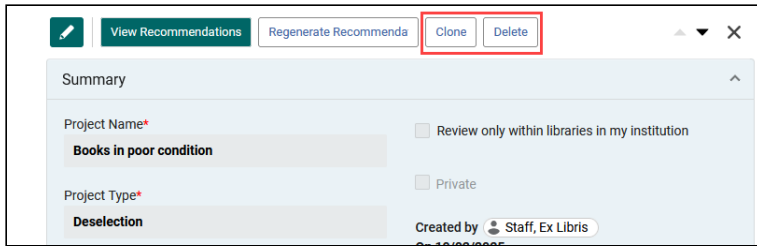
To copy or remove a project from the list, open the three-dot menu next to its name and choose the desired option:

- **Clone** – Creates an identical copy of the project. The duplicate gets added to the list with **Copy of** added to the beginning of the project title. Always rename cloned projects to ensure clarity and to avoid errors when cloning the same original project in the future.
- **Delete** – Permanently removes the project from the list.



Clone and Delete options

You can also clone or delete a project using the buttons above the **Criteria form** on the right side of the screen (visible only if the list of projects is not set to full screen).



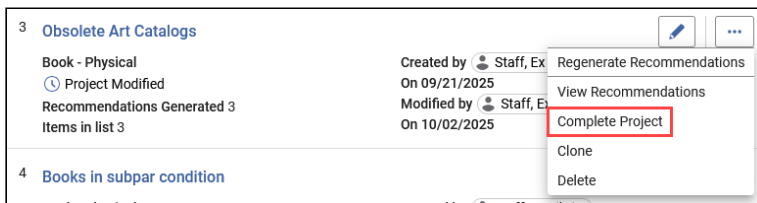
Clone and Delete options above the Criteria form

Note

Deleting a project is **permanent**. Once deleted, a project cannot be restored.

Completing a Project

Once you've reviewed all the recommendations and addressed the relevant ones, you can mark the project as complete. To do this, open the three-dot menu and select **Complete Project**.



The Complete Project button

Alternatively, you can complete a project using the button above the **Criteria form** (not visible if the project list is set to full screen).

Unlike deleting a project, completing a project does not remove it from the list of all projects. Instead, the project remains visible in the list, but it gets the **Project Completed** status.

Note

The **Complete Project** button is not visible for projects with **Recommendations Generated** and **Project Created** statuses.

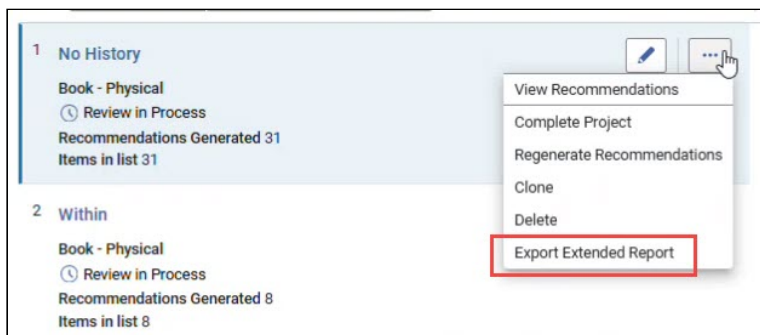
Creating and Downloading an Extended Project Report

Rialto enables you to generate and download a comprehensive comparison report for collection development projects that include comparisons with external institutions. These reports are Excel files that contain detailed information on all active recommendations from the project, along with comparable data for all matching titles from the selected comparison institutions.

How to generate a report:

- Navigate to the project for which you want to create a report
- Open the three-dot menu next to the project name

- Select **Export Extended Report**



Export Extended Report option

Note

The Export Extended Report option is only available after recommendations have been generated for the project.

Once you select **Export Extended Report**, Rialto creates an Excel file in the background. You receive a notification in the top right corner once the report is ready, after which the **Download Extended Report** option becomes available in the project's three-dot menu. Select this option to download the Excel file locally.



Download Extended Report option

All generated reports can be accessed in Alma. Go to **Admin > Manage Jobs and Sets > Monitor Jobs**, open the **History** tab, and select **View** next to the report you wish to open in Alma. To download a local copy, select the three-dot menu, then **Report**, and choose **Click to download export file**.

 A screenshot of the 'Monitor Jobs' history table in Alma. The table has columns for Name, Process ID, Records with exceptions, Job Category, Operator, Submit Date, Start Date, End Date, Status, and Progress details. The first row is highlighted and shows a job named 'Export Extended Recommendations Report - No History' with a status of 'Completed Successfully'.

Name	Process ID	Records with exceptions	Job Category	Operator	Submit Date	Start Date	End Date	Status	Progress details
1 Export Extended Recommendations Report - No History	1049830...	31	Repository	ex_lmpl	30/12/2025 11:28:46 IST	30/12/2025 11:28:46 IST	30/12/2025 11:28:51 IST	Completed Successfully	View
2 Generate Collecto Recommendations - No Social Sciences	1049821...	1599	Repository	ex_lmpl	29/12/2025 14:08:22 IST	29/12/2025 14:08:22 IST	29/12/2025 14:09:28 IST	Completed Successfully	View
3 Generate Collecto Recommendations - Copy of Within	1049821...	21936	Repository	ex_lmpl	29/12/2025 14:07:12 IST	29/12/2025 14:07:12 IST	29/12/2025 14:09:27 IST	Completed Successfully	View
4 Generate Collecto Recommendations - Within	1049821...	4887	Repository	ex_lmpl	29/12/2025 14:04:22 IST	29/12/2025 14:04:22 IST	29/12/2025 14:04:36 IST	Completed Successfully	View

List of created extended reports

Note

Deleting the project or generating a new report removes the existing report.

