

Rialto 2020 Release Notes

Search for what you need

Search:

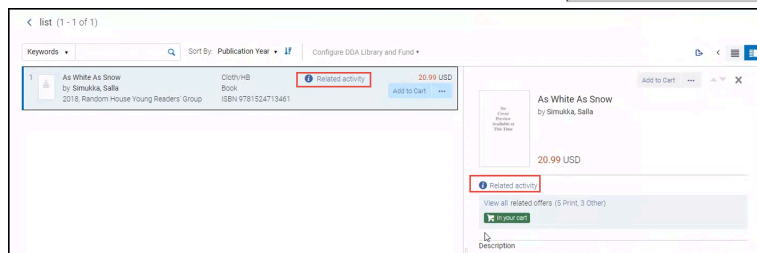
Release:

- December 2020 - General Release
- November 2020 - General Release
- September 2020 - General Release
- August 2020 - General Release
- July 2020 - General Release
- June 2020 - General Release

'Related Activity' Badge in Carts

December 2020 Rialto

Now when viewing an offer where other offers of the same work participate in alternate workflows (in another cart, list, Scheduled Purchase plan, etc) the offer displays the **Related Activity** badge. When opening the offer details, a badge is displayed to represent the workflow(s) that the related offers are part of. Selecting the **View All** link below this badge on the Details panel displays the entire work with all its offers, where you can see the activity on each offer. Selecting the **Related Activity** links will do the same.



See [List of Rialto Badges](#).

Navigate to Works from Approver Cart

December 2020 Rialto

Now an Approver can navigate to an offer's [work](#) from a selector's cart and replace the existing offer with a related offer from the work.



This is similar to the **Replace Title** action (see [Navigate to Works from the Cart](#)); however, **Replace Title** enters the Approver's own cart, while **Add to Selector's Cart** enters the selector's cart that the Approver is actively working on.

See [Navigating to Work from the Cart](#).

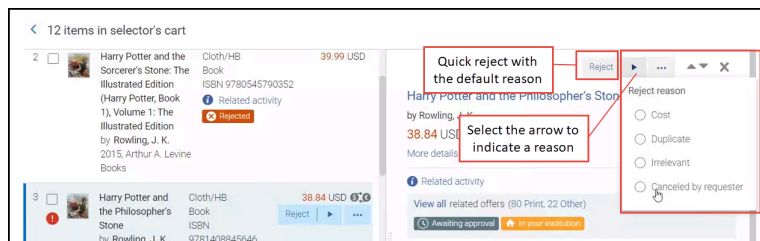
Reject Offer from Cart

December 2020 Rialto

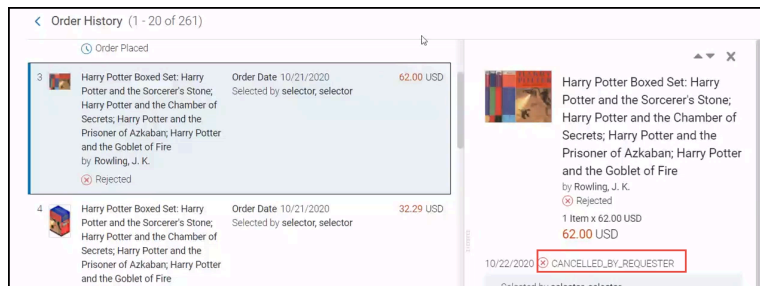
Up till now, when an offer was rejected from the cart, the user was not given an option to select a reason, and the option presented in the order history was "Irrelevant". Now users can select different reasons for rejection. To support this, the **Purchase Request Reject Reasons** configuration table ([Configuration > Acquisitions](#)) is now used to list the reasons of rejection.

To reject from the cart, select the arrow by the **Reject** button and select the reason for rejection. To reject several offers simultaneously, select the checkboxes by the desired offers and the rejection reason by the **Reject** button above the list.

Alternatively, to reject quickly with the default reason configured in the **Purchase Request Reject Reasons** table, just select the **Reject** button.



In the Order History, you can see the rejection reason on the offer:



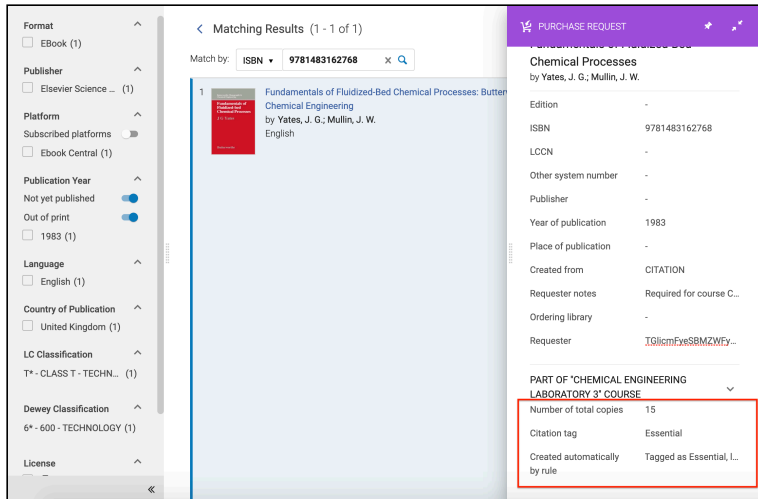
See [Approving and Submitting to Vendor or Rejecting the Cart](#).

Leganto Updates Included in Rialto Purchase Requests

December 2020 Rialto

Now you can see additional fields related to course information from Leganto while evaluating a Purchase Request, enabling you to make the most informed decision without having to navigate away from Rialto. Additional fields now displaying in Purchase Requests:

- Number of total copies requested
- Citation tag
- Created automatically by rule



"In Oasis Plan" Badge Added

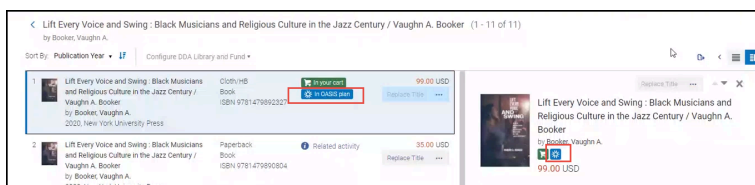
December 2020 Rialto

For Oasis customers, the "In Oasis Plan" badge was added to Rialto on offers scheduled to be auto-purchased in Oasis, to prevent inadvertent purchase of duplicates. The badge appears when an offer is slated to be purchased by an approval plan or standing order in Oasis.

The badge appears for both the offer and the work level.

Note

This badge is applied to offers once an order is created in Oasis. This means that if an order is pending in a review list in Oasis, or on a slip notification, etc., there is no visibility in Rialto. This visibility is planned to be added in upcoming releases.



See See [List of Rialto Badges](#).

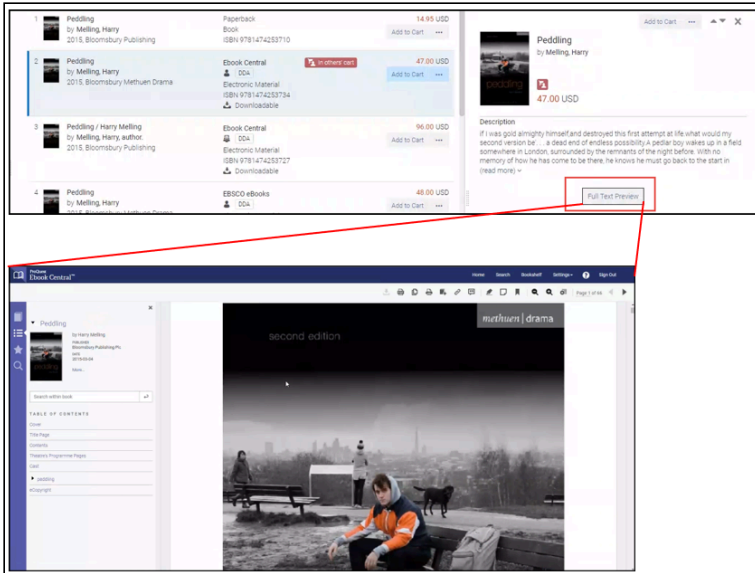
Full Text Preview

December 2020 Rialto

The button "Full Text Preview" was added to the Offer Details panel for ebooks. When provided by the platform, the offer details will display a link to "See inside the book." Selecting the button opens a preview of the ebook in another tab, which allows you to either search inside the book and perform other activities to help you better evaluate your selection, or, view the Table of Contents.

Note

In December 2020 release, preview is provided for pub directs and Ebook Central only. In upcoming releases, preview for EBSCO e-books is planned as well.



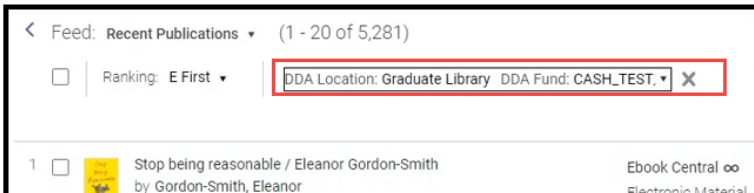
DDA Configurations Persistent Across Session

December 2020 Rialto

Now after you apply your DDA configurations for manually adding to DDA, they will persist across your current session. Conversely, clearing this selection will clear it everywhere in Rialto as well.

Note

The DDA selection is persistent to the browser session, so if your browser times out or you sign out of Alma, you will have to repeat your selection.

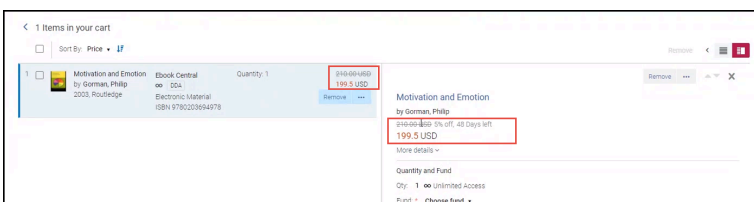


See [Adding Offers to DDA](#).

Ebook Central-specific Discounting Display in the Cart

December 2020 Rialto

Now you can see the discounted price for applicable Ebook Central offers within the cart as well as the list price, so you are aware of the potential savings when purchasing an offer from Ebook Central. In the left pane, you can see also the expiration date for the discount.



Vendor Invoice Number in POLs

December 2020 Rialto

The Vendor Invoice Number is now included in POLs as part of EDI invoicing process, so if your institution uses the Community Zone, you will now be able to see the invoice on the POL. Note that if the PO Line's Vendor Invoice Number is already populated, it is not overridden.

Enhanced "No Results" Page

December 2020 Rialto

Now when you perform a search that fails, a text is displayed on the "No Results" page to remind you some of the actions that you may take to simplify your query. The text is "Try checking your spelling and the search category, or remove an active filter."

Other suggestions for refining your search include:

- Search with Title and Author as keywords.
- When entering a title with punctuation into the Search box - strip punctuation, especially characters such as colons, apostrophes, etc.
- When entering a title with diacritics and umlauts into the Search box - strip them from the words.
- When entering a long title, try shortening it to only a section of it.

See [When No Results Were Found](#).

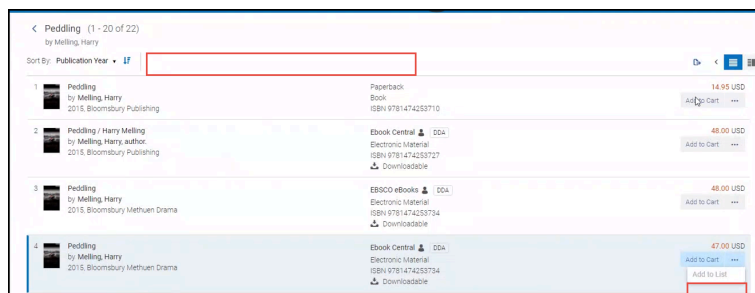
Rialto User Roles and Privileges Enhancements

Ability to Add to DDA

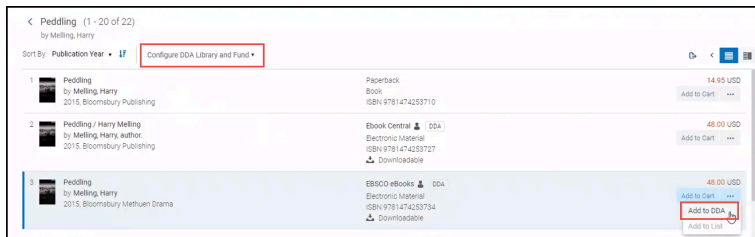
December 2020 Rialto

A new role for better managing DDA privileges 'Selector-Limited' was added. The difference between this role and the Selector role is that the Selector role has the 'Add to DDA' privilege, and the Selector-Limited role does not have this privilege. By default, all selectors will remain as such. However, libraries can adjust the roles to limit users with add to DDA privileges and prevent potential budget issues (overspend on undesirable titles).

Users with the Selector-Limited role cannot access the **Configure DDA Location and Fund** option, and thus cannot access the **Add to DDA** action in the row actions list.



Missing options for users with Selector limited role



Available options for users with the Selector role

See [Managing Rialto User Roles](#) and [Adding Offers to DDA](#).

Enable "Send to Approval" Button for Users with "Checkout" Button

December 2020 Rialto

In some cases, institutions may want to allow Purchasing Operator roles to submit an order for secondary approval, instead of submitting to the vendor directly. To support this, the "Send to Approval" button can be enabled for the Purchasing Operator role.

If you would like to change your Purchasing Operator's rights to checkout or submit an order for approval, please contact support.

Scheduled Purchasing Enhancements

Error When Deleting a Ranking Profile Used by a Scheduled Purchasing Plan

December 2020 Rialto

Now you can ensure that a ranking profile used by a Scheduled Purchase plan cannot be deleted while in use. When a user attempts to delete a ranking profile, an error notification is displayed if it is being used in a Scheduled Purchase plan.

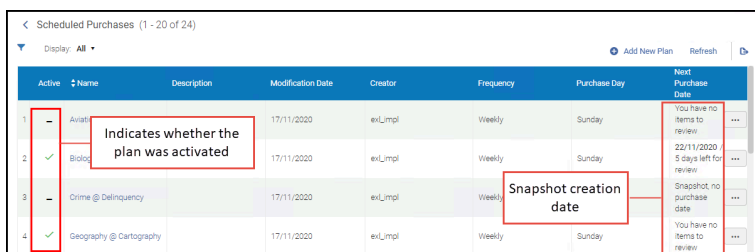
Note

If it a ranking profile is currently in use by the Recommendations profile, another ranking profile is assigned to the Recommendations profile before deleting it.

Creating Snapshot without Activating the Scheduled Purchasing Plan

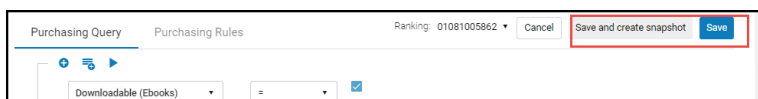
December 2020 Rialto

Now you can create a snapshot of Scheduled Purchase plan offer matches from the plan management page without activating the plan or enabling purchasing. This will allow you to test-run a particular plan before activation.

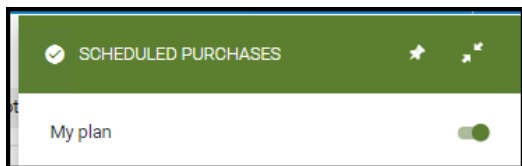


You can utilize this feature when creating a plan, or at any time when editing it. From the plan management page, you are now presented the options to save OR save & create a snapshot, once a base query and rules are in place. This creates a

one-time snapshot for your review, without activating the plan.



Activating the plan is done separately on the Scheduled Purchases panel on the plan management page. This enables and disables purchasing/adding to DDA for a scheduled purchase plan.



See [Scheduled Purchasing Management](#).

Chat with Support

November 2020 Rialto

This enhancement allows staff users who have chat permissions to chat with our Support team. To begin a chat session, select the **Chat** icon in your Production environment:



Chat icon in the persistent menu

For users who have chat permissions, the Chat icon now appears in the persistent menu.

This functionality is disabled by default. Only staff users who have been assigned the **Chat with Support** role can open a chat session with our Support team. For more details, see [Managing User Roles](#).

Changes to the Default Rialto Vendor

November 2020 Rialto

The name of the default Rialto vendor was changed:

- Rialto vendor name changed from Rialto to ProQuest LLC. This name is the name that appears on the invoices issued when purchasing via Rialto.

Note

This change will apply only if the vendor name in your system is the default name 'Rialto'. If you have already configured the vendor name, this change will not apply, and the name you have configured will remain.

In addition, the below changes to the vendor accounts were made:

- Vendor Account Code and Description changed from "Rialto, Rialto" to "Rialto, Firm Orders",
- DDA Order account for DDA orders was added,
- Scheduled Purchases account for scheduled purchasing was added.

Note

If you are not using DDA or Scheduled Purchasing in your system, the new accounts have no affect on your system and you can ignore them.

| Active | Account Code | Description | Discount Percent | Libraries |
|-------------------------------------|--------------|---------------------|------------------|-------------------------------|
| <input checked="" type="checkbox"/> | DDA | DDA Orders | | Southern Methodist University |
| <input checked="" type="checkbox"/> | RIALTO | Firm Order | | Southern Methodist University |
| <input checked="" type="checkbox"/> | SCHEDULED | Scheduled Purchases | | Southern Methodist University |

"In Progress" Badge Added to Offers Waiting for Approval

November 2020 Rialto

A "Waiting for Approval" badge is now placed on offers that are part of a cart that has been submitted to approval by staff. This ensures that the same offer is not accidentally sent to approval more than once.

| | | | | |
|---|--|--|-----------|-------------|
| 1 | Tom Waits on Tom Waits: Interviews and Encounters by Maher, Paul 2011, Chicago Review Press | Paperback Book ISBN 9781569763124 | 19.95 USD | Add to Cart |
| 2 | Tom Waits on Tom Waits: Interviews and Encounters by Maher, Paul 2011, Chicago Review Press | Ebook Central Electronic Material ISBN 9781569769256 Downloadable | 23.98 USD | Add to Cart |

The badge appears at both the work and the offer level. Hovering over the badge at the offer level displays the name of the user who submitted the offer to approval.

Ranking Page Modification

November 2020 Rialto

The link that allows you to add additional ranking criteria on the Ranking Profile page was renamed to 'Add Boost'.

Ranking: Recent Popular

Predicted to be popular

Recently published

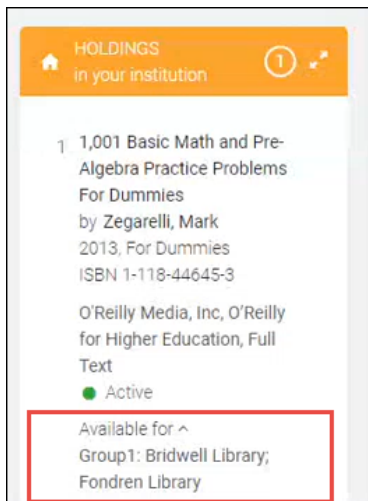
+ Add Boost

'Available for' in Holdings Pane

November 2020 Rialto

Now, when there are holdings that are available for a specific inventory group, the dropdown in the Holdings pane is open

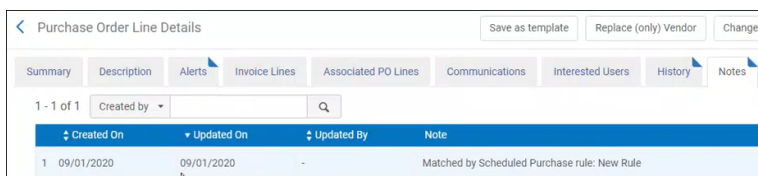
by default.



Internal Note on the PO Line

November 2020 Rialto

Now, when you enter an Internal note in the Rialto cart, not only will the note carry over to the Order History, but it will also populate under the Notes tab in the PO Line after the cart has been submitted.



Scheduled Purchasing

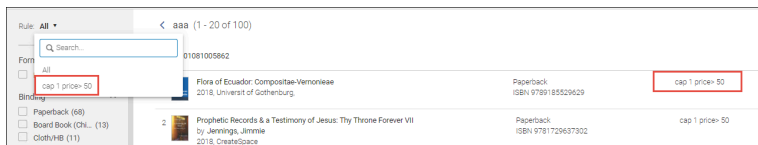
Filtering of Snapshot Results by Rule

November 2020 Rialto

Now you can filter the results of your Scheduling Purchasing plan by Purchasing Rule. This allows you to readily find the titles you need to evaluate for purchase. To do that, the Rule option was added on the Facets pane for snapshot results. The name of the purchasing rule to which the offer matched is now displayed on the offer (see [here](#)).

Note

Only users with Review Feed privilege can filter the snapshot results by rule.



See [Scheduled Purchasing](#).

Matched Rule Indication

November 2020 Rialto

The name of the purchasing rule to which the offer matched is now displayed on the offer, to be visible always.



'Create Snapshot' Action

November 2020 Rialto

The Create Snapshot action was added to the list of actions of Scheduled Purchasing plans. This action allows you to run the plan on demand without waiting for the weekly/bi-weekly run. This action immediately activates the plan.



The snapshot creation might take a few minutes, if the number of rules to process in the plan is large. Once you select this option, you will receive a notification that the snapshot is being created.



When the snapshot is ready, click the name of the plan in the table to open the snapshot.

See [Triggering Creation of the Feed Outside of Feed Schedule](#).

Saving a Scheduled Purchasing Profile

November 2020 Rialto

- A profile contains at least one rule
- Each rule has:
 - A query
 - a valid numeric cap
 - ordering library
 - fund

If one of the above is missing, a scheduling profile cannot be saved. When attempting to save with missing information, a page alert will display on the right side of the page. You will also see an



alert icon on the rule, and the missing required rule fields are outlined in red.

See [Scheduled Purchasing Management](#).

Scheduled Purchasing POL Defaults

November 2020 Rialto

Scheduled purchases are now created in a way that is distinct from firm or DDA orders. Now you can find all scheduled purchases based on the 'Approval Plan' acquisition method of each PO Line, and find all scheduled purchase POLs in a new Rialto vendor sub-account.

- POLs created via scheduled purchases are now attached to a Rialto vendor sub-account "Scheduled Purchases":

Purchase Order Line Details

Vendor Information

Material supplier * ProQuest, LLC/RIALTO/Scheduled Purc [View vendor](#)

Expected receipt after ordering (days) 21

Reclaim Interval (days) 0

- POLs created via scheduled purchases now have an acquisition method "Approval Plan":

PO Line Details

Acquisition method Approval Plan

- The name of the scheduled purchasing rule that triggered the purchase now appears in the internal note of the POL:

Purchase Order Line Details

| Created On | Updated On | Updated By | Note |
|------------|------------|------------|--|
| 09/01/2020 | 09/01/2020 | | Matched by Scheduled Purchase rule: New Rule |

Price Added to Export data

November 2020 Rialto

The price of the offer is now exported to Excel as part of the Scheduled Purchasing snapshot results export.

| Title | Author | Publication Year | Publisher | Binding | Material ISBN13 | Classification | License | Rule Name | Price |
|-------------------------------|------------------|------------------|--------------------------|-----------|------------------|----------------|------------------|-----------|-------|
| Hora de Ecuador: Composae-1 | | 2018 | Universit of Gothenburg, | Paperback | [1 5781915529629 | | cap 1 price > 50 | | 50.11 |
| Prophetic Records & a Testimo | Jennings, Jimmie | 2018 | CreateSpace | Paperback | [1 5781729637302 | | cap 1 price > 50 | | 36.7 |

Scheduled Purchasing

September 2020 Rialto

Scheduled Purchasing now allows you to create a feed of titles to be either purchased or added to your DDA pool at a frequency you choose. This allows Selectors to spend less time on manual selection, and provides a mechanism to have a predictable spend on an ongoing basis.

Scheduled Purchasing plans consist of a purchasing query, purchasing rules, and a ranking profile. Once these are in place and the plan is enabled by Rialto administration, Rialto periodically produces a finite list of best-fit candidate offers, ready to be purchased or added to a DDA pool once the list is reviewed by Selectors.

Rialto Scheduled Purchasing provides a number of advantages compared to the legacy approaches to automated purchasing:

| Function | Legacy systems | Rialto Scheduled Purchasing |
|------------------|--|---|
| Eligible titles | Only newly published titles | Any title in the Marketplace |
| Recency | Upon publication, captures new (profiled) titles | Captures any title based on query |
| Ranking | True or False on match to profile; no ranking | True or False + ranking to assign fitness; boosting offers according to ranking profile |
| Amount purchased | All matches | Best matches up to monetary cap |
| Managing budget | Restrictive query limits matches per purchase interval | Monetary cap defines spend per purchase interval |

See [Scheduled Purchasing](#) and [Scheduled Purchasing Management](#).

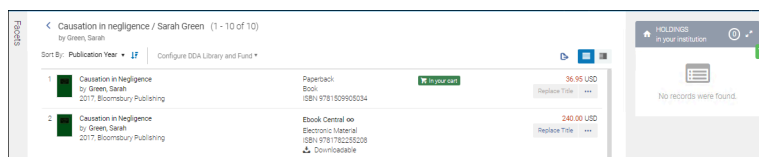
Navigate to Works from the Cart

September 2020 Rialto

Now you can navigate to a list of other offers for that same [work](#) from the cart, to confirm that this is the best offer or to choose an alternate/additional offer in the same work.

To navigate to the offer list for that work:

1. Click the title of the offer in the cart or select **Display Title in Market** in the row actions list.
The list of offers for that work opens. The item currently in the cart is marked with **In your cart** badge.
2. To replace the item with another item, click **Replace Title** on the desired item. The **In your cart** badge moves to the selected title.
To add an additional item (if you increased the number of copies in the cart), click **Add to Cart** on the desired item.



3. To go back to the cart, select



by the work name at the top of the page.

See [Navigating to Work from the Cart](#).

Purchase Request Enhancements

September 2020 Rialto

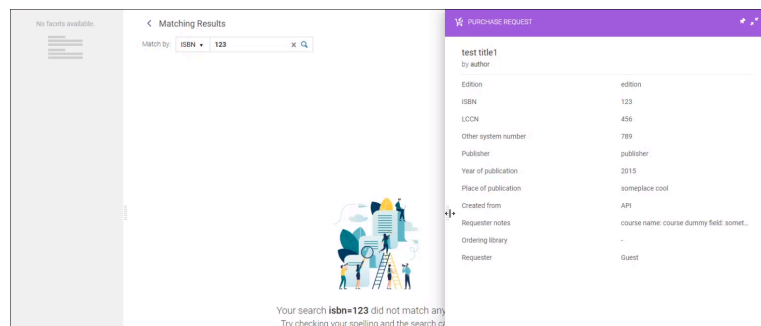
Now if the patron filled in information in the below fields of the Purchase Request web form, these fields appear in the Purchase Request panel:

- Other system number
- Publication year

- Place of publication

The "Citation type" field was removed.

In addition, if the patron filled in some of the custom fields added by the institution, this information now populates the "Requestor Notes" field of the Purchase Request panel (previously it was the "Internal Notes" field). If several such fields were filled in, they all appear in "Requestor Notes" field one after the other in the form of "field A: value A field B: value B...."



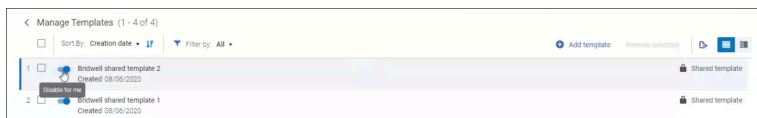
See [Purchase Request Web Form Management](#).

Cart Enhancements

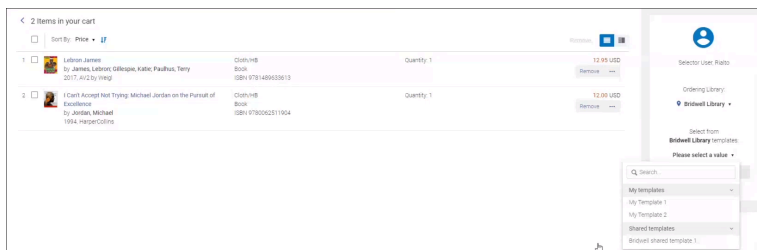
September 2020 Rialto

The cart was enhanced with the following:

- You can now disable institution-level templates that were shared with you. See [Filling in the Cart Options](#).



- In the templates selection dropdown, the private and shared templates are now indicated as such for your convenience.
- The "Apply Location" and "Apply Fund" actions were removed from the top of the page.



- In the right-hand pane that shows the details of the selected offer, the "Location" field was re-labelled to "Shelving Library/Location".

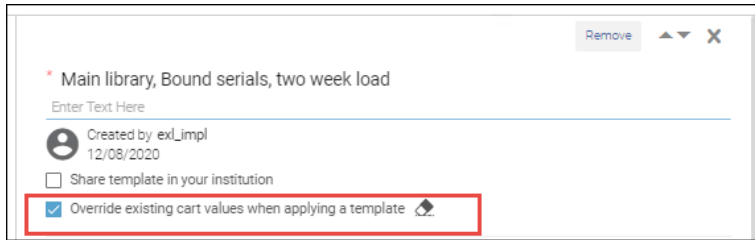
See [Adding to Shopping Cart and Submitting to Approval](#).

Cart Template Enhancements

September 2020 Rialto

You now can select whether the blank values in a template override the existing cart values, or the pre-existing values in

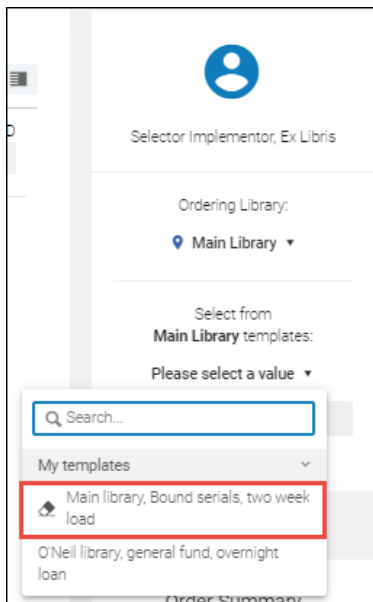
the cart are left as is. This helps you make sure that information specified by the Selection staff is not lost after applying a template.



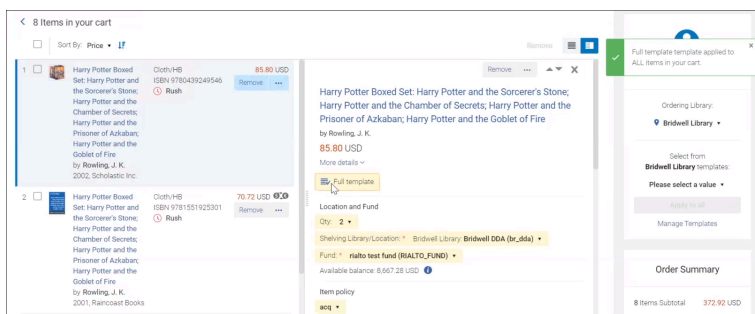
When applying templates in the cart, users can see the



icon by the templates where this option was selected:



When the template has been applied to the cart, the name of the template appears in the right-hand panel, and all the fields where values were inherited from the template receive yellow background. If you modify such value, the yellow background disappears.



See [Cart Template Management](#) and [Adding to Shopping Cart and Submitting to Approval](#).

Ordering Multiple eBooks

September 2020 Rialto

You can now order multiple copies of an eBook, to make sure that patron demand is satisfied when unlimited license is not

available. To do so, indicate the desired number of eBooks in the Quantity field in the cart, when ordering eBook.

Ordering multiple copies is enabled for EBC and EBSCO, only when the offer's license is 'single user' or 'three users' or 'non-linear/concurrent' (i.e., not 'unlimited').

See [Adding to Shopping Cart and Submitting to Approval](#).

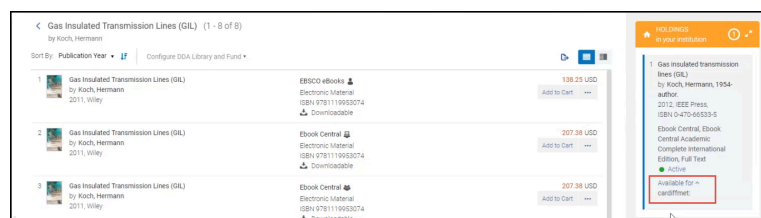
"Available For" in Holdings View

September 2020 Rialto

Now you can see offers that are available as part of your inventory network group within the Holdings panel. This means that only patrons belonging to this group can access the resource contents when searching or browsing in Discovery. For more information, see [Configuring Distributed Access to Electronic Resources](#).

For electronic holdings, you can see the "Available For" statement applied to a portfolio or inherited from the collection or service in Alma. If the portfolio is available for several inventory network groups, all groups are displayed.

When the "Available For" statement does not appear in the Holdings panel, this means that the offer is available to all patrons, without any limitations.



See [Locating Offers that Match Your Holdings](#).

Brill Available in the Rialto Marketplace

September 2020 Rialto

Now eBooks from Brill online are enabled for acquisition through the Rialto marketplace. This expansion of the Rialto offering is important now more than ever before, as librarians meet the demands from students and faculty for eBooks for remote learning.

Please contact Rialto customer support to enable the new platform, if you are unable to purchase.

New Out-of-the-Box Recommendations and Ranking Profiles

September 2020 Rialto

A new recommendations profile and a new ranking profile were added to the profiles that are provided with Rialto out-of-the-box.

The recommendations profile, 'Ebook offerings for print holdings' pulls together all the print holdings in your institution, that are not already owned as an Ebook, and pairs them with their Ebook equivalent offers in the market. This profile allows you to start utilizing Rialto features immediately upon implementation, even before any institutional profiles are finalized. The below query is included in the recommendations profile and available in the feed list:

| Criterion | Value |
|------------------------------------|-------|
| Ebook offerings for print holdings | True |

This recommendations profile is associated with the new ranking profile 'Usage and predicted fit'. You can add offer-level boosts to this profile, to reflect your policies for preferred offers, or you can leave it as-is. The below boosts are included in the ranking profile:

| Boost | Weight |
|---|--------|
| Predicted to be popular | Medium |
| Recently published | Medium |
| Predicted to be of interest to your institution | Medium |
| Historical usage at your institution | High |

See [Managing Recommendation Feed Profiles](#) and [Managing Ranking Profiles](#).

Scheduled Purchasing (Beta)

August 2020 Rialto

August 2020 contains a limited-functionality (Beta) Scheduled Purchasing development.

When completed, Scheduled Purchasing will allow you to create a feed of titles to be either purchased or added to your DDA pool at and will provide a mechanism to have a predictable spend on an ongoing basis.

Bloomsbury Unlimited-Access Ebooks and CAIRN Available in the Rialto Marketplace

August 2020 Rialto

Now more than 10,000 arts, humanities and social sciences ebooks from Bloomsbury Collections and Cairn are enabled for acquisition through the Rialto marketplace. This expansion of the Rialto offering is important now more than ever before as librarians meet the demands from students and faculty for ebooks and other digital media for remote learning. Please contact Rialto customer support to enable the new platforms, if you are unable to purchase.

Cairn

Cairn.info offers the most comprehensive online collection of francophone ebooks in the social sciences and humanities with all major French-language publishers represented. Cairn's ebook aggregation platform features titles not found on any other platform.

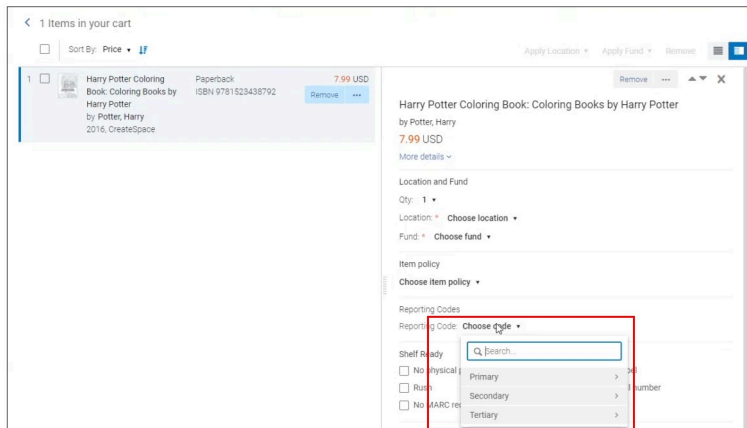
Bloomsbury

Bloomsbury Collections offers excellence and originality in scholarship in the arts, humanities, and social sciences. Discover the ever-expanding eBook library with nearly 10,000 titles across 22 subject areas. Bloomsbury Collections contributes innovative and forward-thinking scholarship to the global academic community.

Multiple Reporting Codes

August 2020 Rialto

Now you can add Primary, Secondary, and/or Tertiary reporting codes. These reporting codes will be assigned to the PO line. Previously you could only select one reporting code.



See [Adding to Shopping Cart and Submitting to Approval](#).

Summary Panel Enhancements

August 2020 Rialto

The summary panels on the right-hand of the pages were expanded, and information from left-hand panels was incorporated into them. This provides for a better user experience, enabling users to view necessary information and utilize facets without having to collapse panels.

The changes involve:

- Left-hand panel information and actions were incorporated into the right-hand panels.
- Multiple panels can be presented simultaneously (for example, Purchase Request and Holdings).
- The

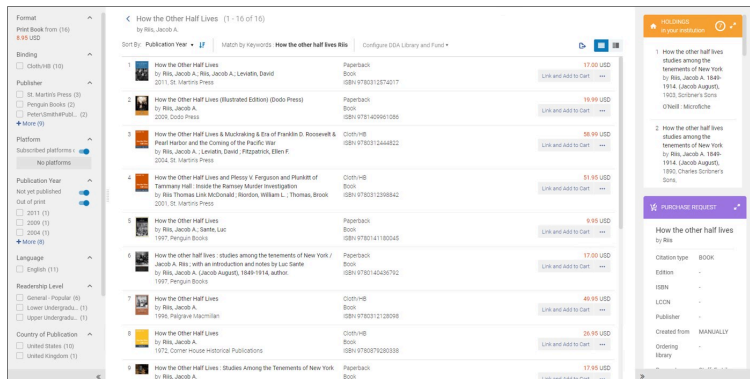


button on the bottom of both the left- and right-hand panels now allows to collapse and expand the panels.

- Users can pin panels to the main panel.
- Expand the panels using the



arrows to the right to view additional information.



Multiple panels

Order Status Enhancements

August 2020 Rialto

The order statuses were enhanced. Now an ordered offer goes through the below statuses:

- **Waiting for Approval** (for Selectors only): The offer is in the Approver's queue.
- **Order Placed** (for Selectors only): A physical item was reviewed and checked out by the Approver.
Order Placed (activated): as above, for electronic orders.
 Opening the Details pane will allow you to see how many copies were ordered (for print titles), links to the Purchase Order and Purchase Order Lines pages, fund and shelving location (for print titles), and the order status details. You can facet by this status.
- **Rejected**: The item was rejected. Open the Details pane to see the rejection reason and rejection date. Currently the default rejection reason in Rialto is "Irrelevant". An option to select between several rejection reasons will be added in the future.
- **Processing**: The order is being processed by the vendor.

Note

Order status details generate directly from the vendor. To view the full progress and messages, select the arrow next to the Purchase Order links. Vendor messages display in received order.

- **Fully Received**: The ordered offer was received by the relevant library (for physical offers).
Activated: The ordered offer was activated in the portfolio (for electronic offers).
- **Order Complete**: The order was fulfilled by Rialto and the PO Line was closed (for physical offers).
Order Complete (Activated): as above (for electronic offers).
- **Canceled**: The ordered offer was pulled back by the Selector or the vendor.

See [Monitoring the Order Status](#).

Cart Templates

July 2020 Rialto

Now you can create and apply customized templates to the items in your shopping cart. Customized templates hold a set of

predefined values for the fields in the Cart page, so that a single template can be applied instead of applying values for every field, thus saving you time and effort. You can choose to apply a template to a specific cart item, or to the entire cart.

You can create private templates for your personal use, or shared templates for use by others in your institution.

The template contains all the fields in the cart:

- Owning library
- Library/location
- Quantity
- Fund
- Reporting code(s)
- Item policy
- Interested user(s) (and notify/hold for print)
- Notes
- Shelf-ready processing options (bypass, MARC, spine label, etc.)

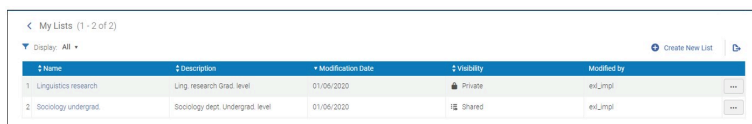
Once the template is applied, if needed, you can change individual cart values to fit your needs.

See [Cart Template Management](#).

Shared Lists

July 2020 Rialto

Now users can share their lists with other selected staff, so that they have can awareness of items in each other's lists, or can collaborate on area-overlapping offers to be purchased. All list members can see, add to, and remove offers from the shared list, as well as add and remove list members.



| Name | Description | Modification Date | Visibility | Modified by |
|-------------------------|---------------------------------|-------------------|------------|-------------|
| 1. Linguistics research | Ling. research Grad level | 01/06/2020 | Private | exLmpj |
| 2. Sociology undergrad | Sociology dept. Undergrad level | 01/06/2020 | Shared | exLmpj |

See [Working with Lists](#).

Purchase Request Web Form

July 2020 Rialto

The Purchase Request web form enables patrons or faculty members to request that a library purchase a resource. The Rialto administrator can create the page and customize its fields, and then embed the form anywhere in the library network using an iframe, or place the URL to the form on any desired page.

Note

Currently patrons can only place book requests. Journal requests are not supported.

See [Purchase Request Web Form Management](#).

Order Status Enhancements

July 2020 Rialto

The order statuses were enhanced. Now an ordered offer goes through the below statuses:

- **Waiting for Approval** (for Selectors only): The offer is in the Approver's queue.
- **Order Placed** (for Selectors only): A physical item was reviewed and checked out by the Approver.
Order Placed (activated): as above, for electronic orders.
Opening the Details pane will allow you to see how many copies were ordered (for print titles), links to the Purchase Order and Purchase Order Lines pages, fund and shelving location (for print titles), and the order status details. You can facet by this status.
- **Rejected**: The item was rejected. Open the Details pane to see the rejection reason and rejection date.

Note

Currently the default rejection reason in Rialto is "Irrelevant". An option to select between several rejection reasons will be added in the future.

-
- **Processing**: The order is being processed by the vendor.
Order status details generate directly from the vendor. To view the full progress and messages, select the arrow next to the Purchase Order links. Vendor messages display in received order.
 - **Received**: The ordered offer was received by the relevant library (for physical offers).
 - **Activated**: The ordered offer was activated in the portfolio (for electronic offer).
 - **Order Complete**: A physical order was fulfilled by Rialto and the PO Line was closed.
Order Complete (Activated): as above, for electronic orders.
 - **Canceled**: The ordered offer was pulled back by the Selector or the vendor.

See [Monitoring the Order Status](#).

Order History Page - View Institution Level Orders

July 2020 Rialto

Now, when you log into the Order History screen, you can see not only the orders you have submitted, but also other team member's orders, so that you can validate any order's status.

You can facet the list by your own orders, or by another user's orders. When you open the page, the 'Selected by Me' facet is applied by default.

See [Monitoring the Order Status](#).

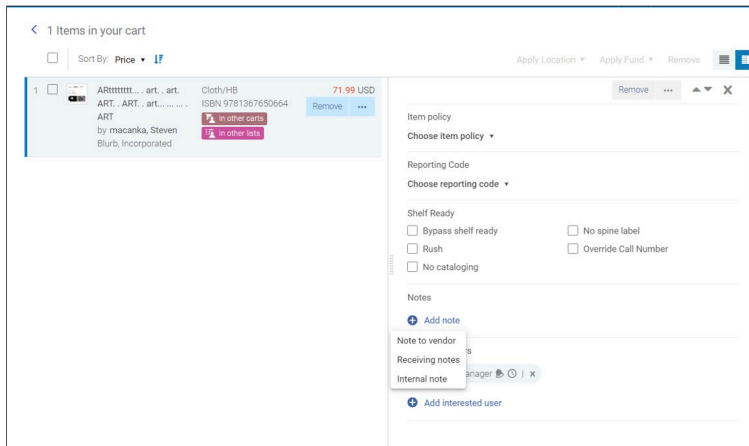
Cart Notes

July 2020 Rialto

The ability to add internal notes to the cart was added.

Currently, you can choose between the following types of notes:

- if you are a selector, select **Internal Note** and write any notes about the ordered item to the approver. These notes are not sent to the vendor.
- If you are an approver, select **Note to Vendor** and write any notes about the ordered item to the vendor.
- For physical materials, select **Receiving Notes** and write any notes you want to populate the "Receiving Note" field in the order line. This note will be visible when receiving the item in Alma.



Internal notes in the cart

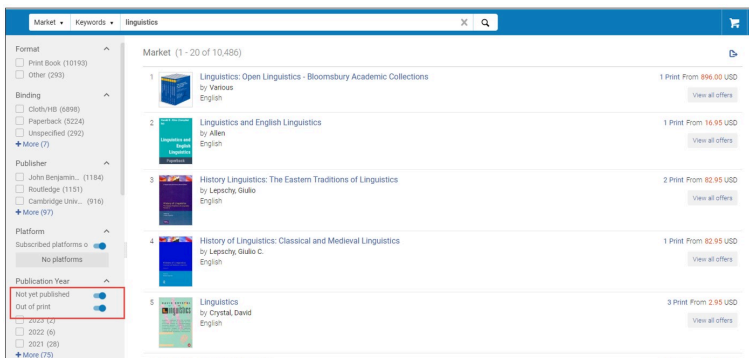
See [Filling in the Cart and Checking Out](#).

'Not Yet Published' and 'Out Of Print' Facets

July 2020 Rialto

In Rialto May 2020 release, the badges for Not Yet Published and Out Of Print titles were added (see [May Release](#)). Now you can refine your search in Rialto through facets for Not Yet Published and Out Of Print offers, to easily find offers that are currently available.

By default, Not Yet Published and Out Of Print offers are included in search/feed results. Toggle the relevant options under the the Publication Year facet to remove them from the search. The current state of the these toggles is saved as user preference for the next Rialto session.



See [Working with Facets](#).

'Dewey Classification' Facet

July 2020 Rialto

A new facet for 'Dewey Classification' was added to the Facets panel. Now you can refine your search or feed in Rialto through this facet, to easily find offers according to their Dewey decimal classification levels. You can apply more than one Dewey call number range.

See [Working with Facets](#).

'DRM Free' and 'Downloadable' Indications

July 2020 Rialto

New indications for 'DRM Free' and 'Downloadable' offers are now displayed on relevant items in an offer list. A facet for 'Electronic Book Types' was added, with these two options, to allow you to find these types of books faster in feed and search results.

The screenshot shows a search results page for 'Migration Borders Freedom' by Bauder, Harald. The left sidebar contains a 'Refine by' section with several facets. The 'Electronic Book Types' facet is expanded, showing 'Downloadable (5)' selected and 'DRM Free (1)' unselected. The 'Dewey Classification' facet is also expanded, showing '3+ - 300 - SOCIAL SCIEN... (5)' selected. The main content area displays five search results, each with a price and an 'Add to Cart' button. The third result is highlighted with a red box, showing 'Taylor and Francis eBooks' and 'DRM Free'.

See [Working with Facets](#).

"In your Cart" Badge on Work-level Results

July 2020 Rialto

The "In your Cart / In others Cart" badge is now displayed on work-level results. Previously, this badge was displayed only on offers.

The screenshot shows two work-level results. The first result is 'When Sarah Met Duck' by Harris, Sarah Gomes, English, with a price of 1 Print From 6.16 USD. The second result is 'Acquired Motives' by Lovett, Sarah (Sarah Poland), English, with a price of 9 Print From 3.99 USD and 1 Other From 18.00 USD. Both results have a green 'In your cart' badge.

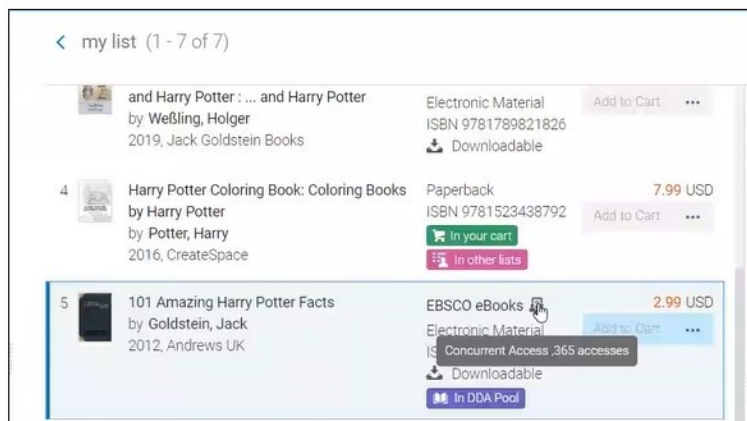
"In your Cart / In others Cart" badge on work-level results

Tooltip for Number of Available Accesses to Electronic Titles

July 2020 Rialto

A tooltip was added for electronic titles that shows the number of accesses that patrons are allowed before you will have to purchase a non-linear or concurrent access license. The tooltip appears on an EBC Non-linear license and an EBSCO Concurrent Access license.

To display the tooltip, hover over the license icon.



Tooltip with number of available statuses

Header Display in Exported Excel File

July 2020 Rialto

The header display in the Excel file that results when exporting offer lists to Excel was made more user-friendly.

| 1 | Name | Description | Modification Date | Visibility | Modified by |
|---|---------------------|---------------------------|-------------------|------------|-------------|
| 2 | Linguistic research | Ling. research Grad level | 16/06/2020 | PRIVATE | ext_impl |

Headers in the Excel file

Rialto Footer and Terms of Use

July 2020 Rialto

Rialto Footer and Terms of Use were introduced on the bottom of the right-side panel. Click on the Terms of Use link to see the full terms of use.

Market Search and Menu are Role-dependent

June 2020 Rialto

Previously, access to the Rialto Market search and menu was based on `rialto_enabled` customer parameter. This means that all users with access to Rialto Market had the 'Market' search type enabled in the persistent search box at the top of each page, and could open the Market menu, even when these users had no [Rialto-related user role](#) assigned to them. Now users must be assigned at least one Rialto-related user role to be have the 'Market' search type enabled, and to open the Market menu (in addition to having the `rialto_enabled` customer parameter set to true).

To support this, the `CART_MANAGEMENT` privilege was added to all Rialto-related roles. Now, access to Rialto Market

is based on both the rialto_enabled customer parameter and CART_MANAGEMENT privilege.

See [Managing Rialto User Roles](#).

Multiple Interested Users in Cart

June 2020 Rialto

Now you can specify multiple interested users in the cart for each ordered offer.

'Interdisciplinary Studies' Criterion

June 2020 Rialto

A new criterion 'Interdisciplinary Studies' was added to the list of criteria included in the recommendation profile.

This criterion allows you to select an area of study, to include in your feed offers that have this as a secondary area of study, in addition to another main one. You can enter several areas of study, separated by comma (,). These values are manually assigned to offers by a ProQuest Record Enhancement team.

See [Criteria included in the Recommendation Profile](#).

Offers with No Publication Year

June 2020 Rialto

When publication year is missing, offers are now displayed in the Cart with "Undefined" as publication year:

