

Selection Plans

All users can view and edit the Selection Plan snapshot.

The following roles are required to create and edit Selection Plan profiles:

- Rialto Administrator

Selection Plans allow library administration to create a snapshot of offers to be either purchased or added to your DDA pool at a chosen frequency (for more information on DDA, see [Adding Offers to DDA Pool](#)). This allows Selectors to spend less time on manual selection, and provides a mechanism to have a predictable spend on an ongoing basis. Selection Plans consist of a query, rules, and a ranking profile. Once these are in place and the plan is fully enabled by your administration, Rialto will produce a list of best-fit candidate offers, ready to be purchased or added to a DDA pool.

Rialto Selection Plans provide a number of advantages compared to the legacy approaches to automated purchasing:

Function	Legacy Systems	Rialto Selection Plans
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

Once the title is purchased automatically:

- the PO is created in Alma with the relevant PO lines.
- the specific offer is added to the list of institution's holdings.

For information on Selection Plans, watch [Selection Plan](#) (6 min).

Note

Please contact customer support to enable the full Selection Plan workflow. Plan pages can be accessed by users with the correct permissions, however, the "purchasing/add to DDA" action will not take place without being enabled by Rialto help.

Viewing and editing the Selection Plan feed is done from the **Selection Plans** page ([Collection Development > Automatic Selection > Selection Plans](#)).

Active	Name	Description	Modification Date	Created By	Modified By	Frequency	Review Day	Last run	Next Review Date	Status
1	partners	tyne	05/31/2023	Staff Ex Libris	Staff Ex Libris	Weekly	Sunday		Snapshot, no purchase date	Reviewed
2	reviewed		07/10/2023	Staff Ex Libris	Staff Ex Libris	Weekly	Sunday		Your snapshot is being created...	Not yet reviewed
3	int		07/10/2023	Staff Ex Libris	Staff Ex Libris	Weekly	Sunday		You have no items to review	Reviewed

You can do the following on this page:

- [Review the active feed and reject undesired titles](#)
- [Trigger the creation of the feed outside of the feed schedule](#)
- [View the purchase history](#) of items that were purchased via Selection Plans

The Selection Plan Feed and Review Period

Selection Plans can be test-run prior to activation to see if they bring the desired results (by clicking "Create Snapshot" in the plan's row actions). When you are sure that the plan works as expected, the Rialto Administrator will activate the plan. After a Selection Plan has been activated, it runs at the chosen weekly or bi-weekly frequency, and a snapshot of candidate titles per that specific run is created each time.

This snapshot has a *review period*, defined by the review day and period that were specified for the plan (see [Scheduled Purchasing Management](#)). The review period is the number of days from feed creation to the purchase day. Within this review period, the selection staff can evaluate the purchase candidates and reject the undesired titles from the snapshot.

In the **Selection Plans** page you can see which plans were activated and which are awaiting review. See below for the full description of messages on the Selection Plans page:

Message	Description
"You have no items to review."	<ul style="list-style-type: none"> • When the plan has not been activated: The plan was not activated, thus a feed of items to review was not created. • When the plan has been activated: The snapshot was already reviewed.
"XX days left for review."	The plan was activated, the snapshot awaits your review.
"Snapshot, no purchase date."	The plan has not been activated, the snapshot was created manually by selecting the "Create Snapshot" action on the row actions. See Triggering Creation of the Snapshot Outside of Schedule for more details.
"Review ends today. Actions will be taken tonight."	Your review period ends today. Titles included in the snapshot will be purchased or added to DDA around midnight tonight.
"Review ended manually. Actions will be taken tonight."	Review period was manually marked as completed. Titles included in the snapshot will be purchased or added to DDA around midnight tonight.
"Previous actions failed. A new attempt will be made tonight."	Previous attempt at purchasing / adding titles to DDA for this selection plan failed. A new attempt will be made around midnight tonight.
"Processing actions. You will be able to resume work when actions complete."	The profile's items are in the process of being purchased/added to DDA. You will be able to resume work on this profile when this process is finished.
"Snapshot created. Selection Plans are in test mode and no further actions will be taken."	The purchasing/ add to DDA phase has not been enabled by customer support, so the plan will not perform these actions. Please contact customer support to fully activate the selection plan workflow.
Status column messages:	

Message	Description
Not Yet Reviewed	This status indicates that a snapshot has not yet been accessed or seen by any user with access to that specific plan, signaling that further action or review may be required.
Reviewed	Once any user with access to the selection plan opens and reviews the snapshot, it will be marked as "Reviewed," ensuring that users can quickly identify which plans have been examined.
Pending Snapshot	During the creation of a new snapshot, the status will temporarily display as "Pending Snapshot," providing visibility into ongoing updates and changes to the plan.
Review Not Required	In cases where the snapshot is empty, and there is no list to review, the status will be set to "Review Not Required," indicating that no further action is needed.

Active	Name	Description	Modification Date	Created by	Modified by	Frequency	Review Day	Last run	Next Review Date	Status
1	pattern	Indicates whether the plan was activated	05/01/2023	Staff & Users						Reviewed
2	reviewed	The plan was activated, snapshot awaits review	07/16/2023	Staff & Users						Not yet reviewed
3	not	The plan was not activated, snapshot was created manually	07/12/2023	Staff & Users						Reviewed

When reviewing the feed, reviewers of Selection Plans can see all the criteria used to select each title in the feed's Summary panel. To view the rules, select and offer to expand the details panel. Admins can Select the **Rules Configuration** link to navigate to the rules configurations.

Duplicate Purchase Prevention

The Selection Plan snapshot does not contain the existing holdings of your institution, and does not contain the items included in the DDA pool.

Optionally, if you are part of a consortia, you have the option to exclude Network Zone holdings as well. When creating or modifying a Selection Plan, a checkbox is present at the top of the content under the "Query" tab:

Childrens & YA Selection Plan

Query Rules Test

Exclude network holdings from results

To avoid purchase duplication with manual orders, a badge displays on all Selection Plans offers when they appear elsewhere in Rialto:

2		Zoo Animals: Seals and Sea Lions by Gallagher, Debbie 2010, Macmillan Education Australia	Cloth/HB Book ISBN 9781420268867		0.01 USD	Add to Cart
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Reviewing the Selection Plan's Snapshot and Rejecting Undesired Titles

Note

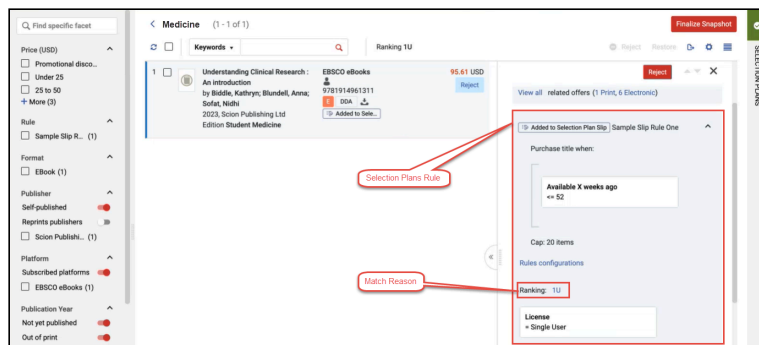
- If a user rejects titles from the Selection Plan's feed, additional titles are not added to meet the defined caps.
 - The rejection is only from that particular Selection Plan. It does not apply to any other plans.
 - The rejection is permanent for that specific Selection Plan.
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To review the Selection Plan's snapshot and reject undesired offers:

1. On the **Selection Plans** page (**Collection Development > Automatic Selection > Selection Plans**), in the actions menu for the plan that is up for review, click **Review**. The snapshot opens.
 2. Click the offer you want to review. The offer opens in the right-hand pane. On the offer, you can see the Selection Plan's rule that triggered the offer to be added to the snapshot. Within the Facets pane, you can filter the list of offers by rules, to allow you to readily find the titles you need to evaluate for purchase.
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Note

Rialto displays the match reason on snapshots for each title on a selection plan. This enables users to comprehend the specific query value, operator, and ranking boosts that triggered the selection of a title under a particular rule.



Selection Plan Review Offer

Note

The query builder enables users to include holdings in the results for purchasing new editions of held titles, series, volumes, and so forth. To enable this, select the check box **Include/exclude new editions of held titles**.

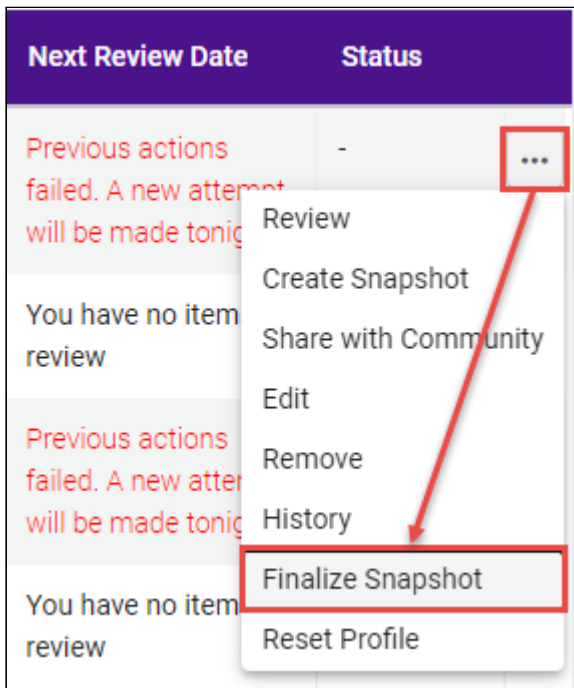


Include New Editions of Held Titles

3. Select **Reject** to remove the offer from the snapshot. The offer still appears in the snapshot, but it is now grayed-out and disabled.
A rejected title continues showing as rejected in the snapshot, to enable other relevant users see what was rejected. Do this for as many offers as needed.

Note

Rialto Administrators have the option to eliminate the review period for snapshots. Selecting the **Finalize Snapshot** option in the Selection Plan screen enables users to lock in pricing and receive their books faster. This option ensures an immediate execution without the next-day delay, allowing titles to be purchased, added to Demand-Driven Acquisition (DDA), or flagged for Title Alerts. A confirmation window prompts users to confirm their actions. This option also exposes the existing line-level action on the list of plans, enabling Rialto Administrators to finalize snapshots seamlessly, adding titles to DDA or making purchases with cart values assigned from the selection plan.



Finalize Snapshot Option

Triggering Creation of the Snapshot Outside of Schedule

Normally the Selection Plan's snapshot is created at a chosen weekly or bi-weekly frequency, determined by the Rialto Administrator. However, you can run the plan on demand without waiting for the weekly/bi-weekly run. This action immediately creates a snapshot of offers that are candidates for purchasing / adding to DDA. Alternatively, if the plan hasn't been activated yet, you can create a snapshot on demand to test-run the plan; however, this does not activate the plan or enable purchasing. If you like the results, work with the Rialto Administrator to activate the plan.

To create a snapshot:

- On the **Selection Plans** page (**Collection Development > Automatic Selection > Selection Plans**), in the actions menu, click **Create snapshot**.

Active	Name	Description	Modification Date	Created by	Modified by	Frequency	Review Day	Next Review Date	
1	Aviation & Mechanics		16/12/2020	RialtoUser1612200914383	ex_Lmpl	Weekly	Sunday	You have no items to review	...
2	Biology & Evolution		16/12/2020	ex_Lmpl	ex_Lmpl	Weekly	Sunday	20/12/2020 / 4 days left for review	Review
3	Crime & Delinquency		16/12/2020	ex_Lmpl	ex_Lmpl	Weekly	Sunday	You have review	Review Create Snapshot
4	Geography & Cartography		16/12/2020	RialtoUser1412201322269	ex_Lmpl	Weekly	Sunday	Snapshot purchase	Edit Remove

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 the notification that the snapshot is being created.

Active	Name	Description	Modification Date	Created by	Modified by	Frequency	Review Day	Next Review Date	
1	Aviation & Mechanics		16/12/2020	RialtoUser1612200914383	ex_Lmpl	Weekly	Sunday	You have no items to review	...
2	Biology & Evolution		16/12/2020	ex_Lmpl	ex_Lmpl	Weekly	Sunday	Your snapshot is being created.	...

When the snapshot is ready, click the name of the plan to open to view it.

Searching for Offers in the Selection Plan

On the **Selection Plans** page (**Collection Development > Automatic Selection > Selection Plans**), you can search for a Selection Plan's offers in its feed by using facets. In the facet list, select the values for which you want to see results. The facets selected to filter the list appear at the top of the Facets panel. Click X to clear the facets you want to remove. For a full list of facets, see [Working with Facets](#).

The display of facet values is dynamic and reflects only the values that belong to offers available in the order history. For example, if you do not see a certain value in your facets list, this means that you do not have offers with this value in your DDA list.

Items detected as the newest edition for owned titles are indicated and enabled in Selection Plans with the Newest Edition icon (

Newest edition

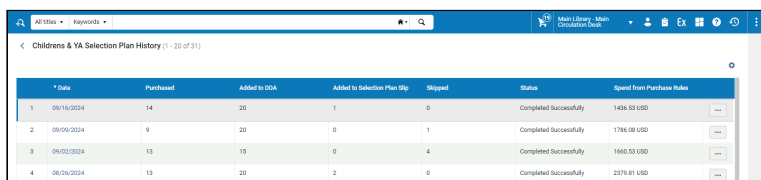
). This helps facilitate identifying and purchasing new editions of already held titles, series, volumes, and more.

Viewing the History of a Selection Plan

You can view the history of a Selection Plan: when it ran and which titles were purchased, added to DDA, added to Selection Plan slips ([Title Alerts](#)), or skipped (see [Skipped Titles](#), below).

To view a Selection Plan's history:

- On the **Selection Plans** page ([Collection Development > Automatic Selection > Selection Plans](#)), in the actions menu of the plan, select **History**. The Selection Plan History page opens and displays a list of the dates on which the Selection Plan was run along with data about each run.



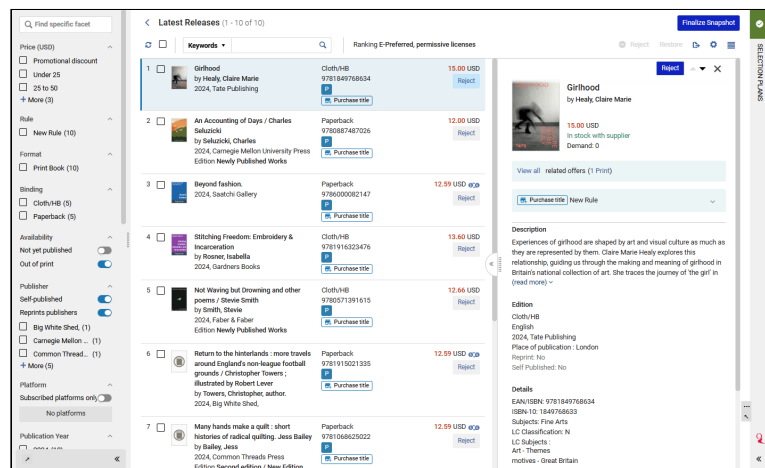
#	Date	Purchased	Added to DDA	Added to Selection Plan Slip	Skipped	Status	Spend From Purchase Rules
1	09/16/2024	14	20	1	0	Completed Successfully	1436.53 USD
2	09/09/2024	9	20	0	1	Completed Successfully	1784.08 USD
3	09/02/2024	13	15	0	4	Completed Successfully	1660.52 USD
4	08/26/2024	13	20	2	0	Completed Successfully	2279.81 USD

Selection Plan History Page

Viewing Run Details

From the Selection Plan History page, you can access additional details about a run. Select the date of a run (or, in the actions menu of the run, select **Additional Details**) to see details about the snapshot that was created during that run of the Selection Plan. A list of the offers included in the snapshot is displayed. Use the facets and the search field to filter the list and locate specific items, as required. (For a full list of facets, see [Working with Facets](#).)

Select an offer to view its details. The offer details open in the right pane. The details include information about which of the Selection Plan's rules triggered the offer to be added to the snapshot.



The screenshot shows the 'Latest Releases' page with a list of offers. The first offer is 'Girlhood' by Healy, Claire Marie, 2024, Tate Publishing, priced at 15.00 USD. The right pane shows the details for this offer, including a description: 'Experiences of girlhood are shaped by art and visual culture as much as they are represented by them. Claire Marie Healy explores this relationship, guiding us through the making and meaning of girlhood in Britain's national collection of art; she traces the journey of 'the girl' in (read more)'. Other details include Edition: Cloth/HB, English, 2024, Tate Publishing, Place of publication: London, Reprint: No, Self-Published: No, and ISBN: 9781849768634.

Selection Plan Offers for a Run

Skipped Titles

In the purchasing phase of a Selection Plan ("Phase 2"), items may be skipped for various reasons. For example, they may already be in the holdings or in DDA, or they may have an open purchase request from another Selection Plan. You can see why they were skipped in one of the following ways:

- In the additional details of a run (see [Viewing Run Details](#), above), the reason is displayed when you hover over the

Skipped badge.

- In an export of the additional details of a run (select



), the offer **Status** (*Skipped*, *Purchased*, etc.) appears as well as the **Reason** for the status.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Title	Author	PublYr	PublH	Binding	Material	ISBN13	Class	Plate	License	Price	Status	Reason			
1	A Computer-Generated Concordance to the Syriac New Testament, Volume 5: Volume 5. Appendices I	Kiraz, George Anton	2024	Brill	Electronic Book	["Electronic Material"]	9789004543324		BRILL	Unlimited Access	329.0 USD	Skipped	Offering in institution			
2	From Theory to Practice in Private International Law. Gedächtnisschrift für Bruce Neumann: Performative	Borg-Barthel, Justin; Trimmings, Katarina; Louria Hayon, Adi	2024	Hart	Electronic Book	["Electronic Material"]	9781509956678	K7040	BLOOM	Unlimited Access	232.0 USD	Skipped	Offering in DDA pool			
3	Scepticism and the Aporia of Sense	Louria Hayon, Adi	2024	De Gruyter	Electronic Book	["Electronic Material"]	9783110664133	N6537. N58	DEG	Unlimited Access	140.0 USD	Purchased	Order Created			

- In the Offerings Report download (which provides information about phases one and two of a run), the reason appears under **Reason**.

To access the Offerings Report:

- In the Selection Plan History page, in the row actions of the run, select **Job Instance**. The Job Report opens in a sliding window.

Profile id	Phase	Number Of Offerings
1 53586014840002466	FIRST	4
2 53586014840002466	SECOND	6

- Select **Click to download offerings report**. The report is downloaded by your browser as a CSV file. Its name begins with **Rialto SP Status_**, followed by the Process ID of the run.
- Open the downloaded file (for example, in Excel). The **Reason** for the status appears in column D in the following example:

	A	B	C	D	E	F
1	Profile Id	Offering Id	Status	Reason	Phase	Isbn13
2	53588626940002466	1879145673	PROCESSED	Order Created	SECOND	9780443186233
3	53588626940002466	1879146359	PROCESSED	Order Created	SECOND	9780443238529
4	53588626940002466	1879144909	SKIPPED	In institution	SECOND	9780443339509
5	53588626940002466	1879144915	SKIPPED	Duplicate offering	SECOND	9780443339509