
November Release

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

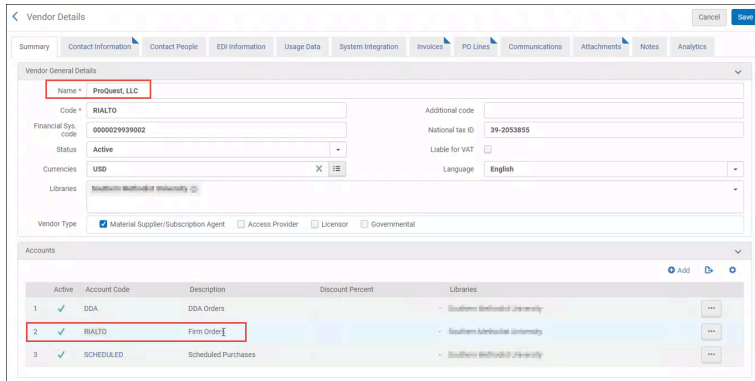
This change will apply only if the vendor name in your system is the default name 'Rialto'. If you have already configured the vendor name, this change will not apply, and the name you have configured will remain.

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

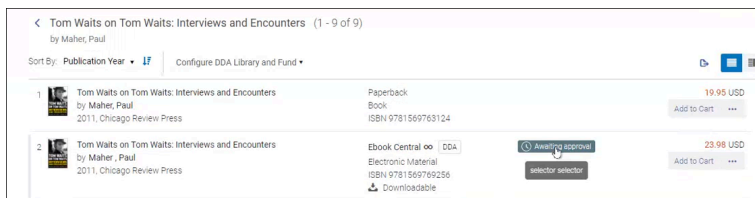
If you are not using DDA or Scheduled Purchasing in your system, the new accounts have no affect on your system and you can ignore them.



"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.



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

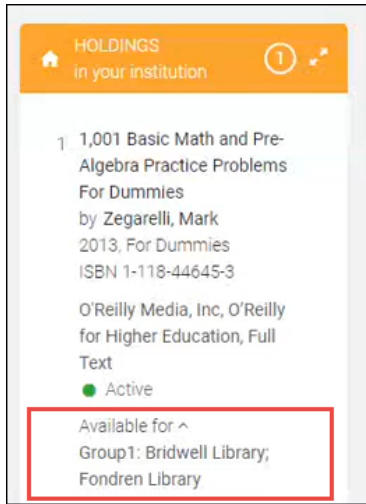
The link that allows you to add additional ranking criteria on the Ranking Profile page was renamed to 'Add Boost'.



'Available for' in Holdings Pane

November 2020 Rialto

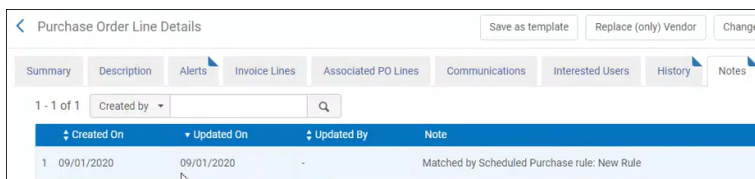
Now, when there are holdings that are available for a specific inventory group, the dropdown in the Holdings pane is open by default.



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

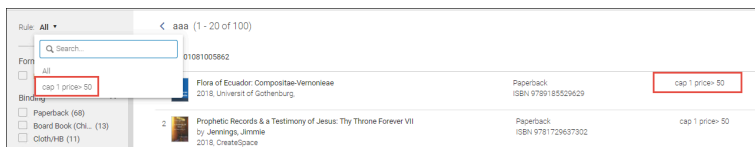
Filtering of Snapshot Results by Rule

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.

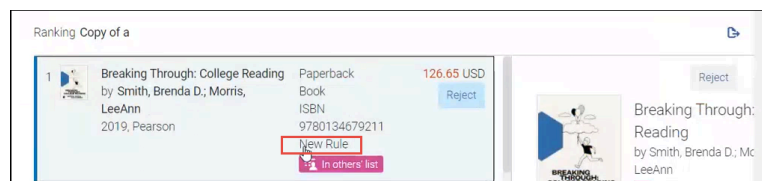


See [Scheduled Purchasing](#).

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.

Name	Description	Modification Date	Creator	Frequency	Review Day	Next Purchase Date
1 new plan		24/09/2020	es_lmpd	Weekly	Sunday	You have no items to review.
2 plan_0210099402		02/10/2020	RialtoUser021020099401	Weekly	Sunday	You have no items to review. Create Snapshot
3 plan_05100796768		05/10/2020	RialtoUser0510200796624	Weekly	Sunday	You have no items to review. Edit
4 plan_07100707561		07/10/2020	RialtoUser0710200707220	Weekly	Sunday	You have no items to review. Delete
5 plan_08100690440		08/10/2020	RialtoUser08100690440	Weekly	Sunday	You have no items to review. Run job today

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.

Name	Description	Modification Date	Creator	Frequency	Review Day	Next Purchase Date
1 new plan		24/09/2020	es_lmpd	Weekly	Sunday	Your 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](#).

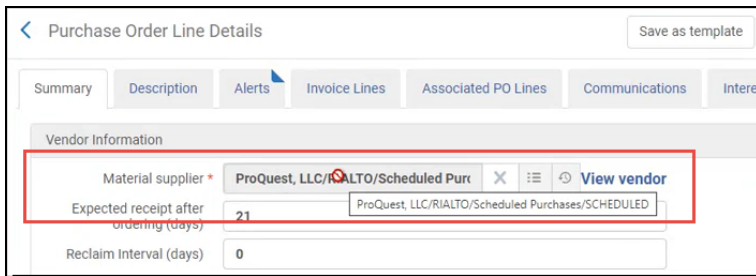
Scheduled Purchasing POL Defaults

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.

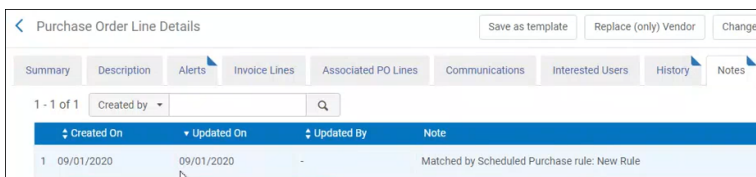
- POLs created via scheduled purchases are now attached to a Rialto vendor sub-account "Scheduled Purchases":



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



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



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
Flora of Ecuador: Compositae-1		2018	Universit of Gothenburg,	Paperback	[] 578185529629			cap 1 price> 50	50.11
Prophetic Records & a Testimo	Jennings, Jimmie	2018	CreateSpace	Paperback	[] 5781729637302			cap 1 price> 50	36.7