

Reviewing and Approving Orders

The following roles are required to work with the shopping cart:

- To submit the cart for approval: Super Selector, Selector, Selector-Limited
- To approve the cart: Rialto Manager
- To check out the cart: Rialto Manager, Rialto Purchaser

Once you have identified (through [Rialto Marketplace search](#), [recommendations feed](#), [purchase request](#), or [list](#)) the offers of a [work](#) that you would like to purchase, you can place these offers in the Rialto Marketplace shopping cart. The next steps depend on your role within the institution:

- If you have the Selector role, you submit individual offers within the cart for approval to the Purchasing Manager. The Purchasing Manager will review the order, and can approve or reject individual offers. When the order is approved, Rialto generates a Purchase Order and sends it to the vendor. At any time, you can monitor the order's real-time progress via the [Order History page](#).
- If you have the Purchasing Operator role, you can check out individual offers within the cart yourself. In this case as well, Rialto generates a Purchase Order and sends it to the vendor.
- If you are the Rialto Manager, you review and check out the orders made by the selection staff.

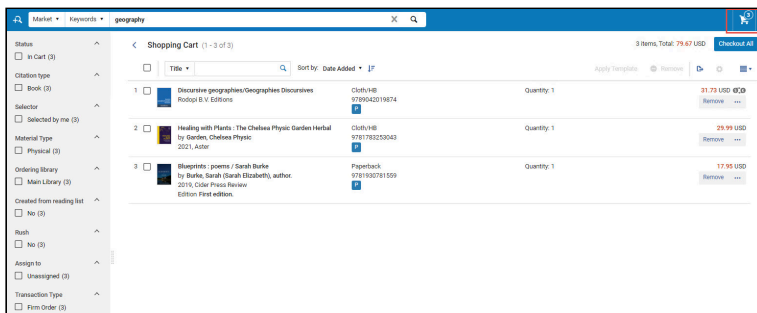
For information on submitting the cart for approval, watch [Ordering](#) (3:00 min.).

For information on approving a cart, watch [Order Approval](#) (3:44 min.)

These activities are managed from the Shopping Cart page. Select the **Cart** icon (



) to open the page.



Shopping Cart Page

Note

The information you enter on this page is saved automatically.

Ordering Library Management

The cart is disabled for purchase until you select the Ordering library: the library on behalf of which the order is

made. Ordering libraries are tied to specific shelving locations in the system; in turn, shelving locations are tied to specific funds. The available locations and funds are configured to the ordering library in Alma (for details, see [Configuring Physical Locations](#)).

You can submit one order with multiple ordering libraries. Carts are not tied to specific ordering libraries, so you can submit offers from any ordering library you have access to, in one cart submission.

The ordering library must have a valid shipping and billing address in the system. If the system cannot find it, the ordering library is disabled in the cart. To indicate valid addresses, see [Configuring the Institution and Its Libraries](#).

Cart Template Management

Instead of filling in all cart options manually, you can apply a customized template to your shopping cart. Cart templates hold a set of predefined values of the cart fields, so that you can apply a single template instead of applying values for every field, thus saving you time and effort. For information on creating and managing cart templates, see [Cart Template Management](#). Once the template is applied, if needed, you can change individual cart field values to fit your needs.

Each template is created for a single ordering library. You can only apply a template to an order made for that ordering library.

Applying a template is not mandatory - if desired, you can fill in the cart options manually.

Filling in the Cart

The following roles are required to submit the cart to approval:

- Super Selector, Selector, Selector-Limited

The following roles are required to check out the cart:

- Rialto Manager, Purchasing Operator

You can add as many offers to the shopping cart as you'd like; however, when you submit for approval / check out the cart, this is selective - you submit to checkout individual offers, and not the entire cart.

Indicating the [ordering library](#), the shelving location, and the funds is mandatory. However, if you are part of the selection staff, your institution policy might be that selectors do not allocate fund or location. In this case, you can send the order directly to approval, and the purchaser will complete the information. If you did indicate this information, the purchaser may change your selections, if necessary.

In addition, within the shopping cart you may need to provide more information about the order. If you are part of the purchasing staff, this may be mandatory. If you are part of the selection staff, this is optional. If you do not provide this information, the Rialto Manager will provide it as part of the order approval.

Approving and checking out the cart automatically generates a Purchase Order and sends the order to the vendor.

Note

To order several copies of an offer, where each copy is ordered for a different shelving location and constitutes a different PO line, see [Ordering Copies for Different Shelving Locations](#).

Filling in the Cart Options

There are two ways to fill in the cart options:

- By applying a cart template to the options. This is the quickest option if you need to order many offers with the same or similar options. See [Applying Template to the Cart Options](#).
- By filling in the options manually. Do this when the offers you are ordering are all different from one another.

To apply a template to the cart options:

1. In the right pane of the cart, select the ordering library.
2. In the field below, select the desired template or select **Use a Template** in the row actions list. Only the templates created for the selected ordering library are available in the dropdown.
 - Select the template you wish to apply. To check the template values before applying it, click **Manage Template**. This takes you to the [Manage Templates](#) page. From here you can view all the templates available to you, and modify any that you have created. However, if modifying, make your changes before you apply the template to any offers: once the template was applied to the cart, the changes made to the template do not affect the cart. Note that templates that are disabled on the [Manage Templates](#) page do not appear in the dropdown.
 - In the dropdown you see your private templates separately from the institution-level templates shared with you. Note that you can only make change to your private templates. However, you can hide from view the shared templates that you don't use: click **Manage Template**, and on the [Manage Templates](#) page, toggle the shared template Off. This disables the template only for you; other users will still have this template active.



- When selecting the template, some templates may be marked with

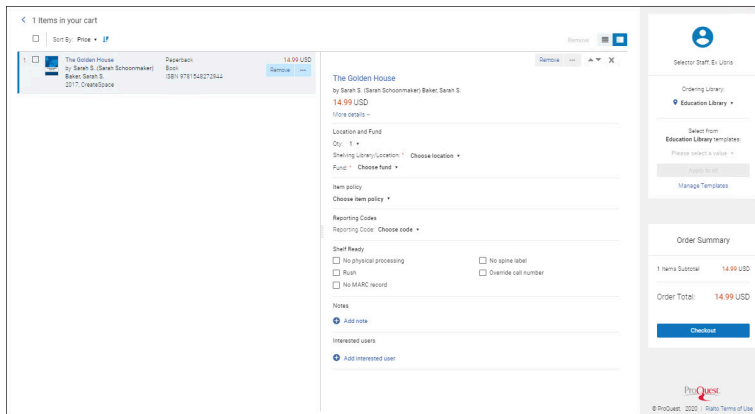


in the dropdown. This means that the blank values in the template overwrite the existing cart values. In templates without this icon, in case of blank values in the template, the pre-existing values in the cart are left as is. This helps you make sure that information specified by the Selection staff is not lost after applying a template.

3. If you want to apply this template to all the offers in your cart, select **Apply to All**. If you wish to apply it to specific offers, select the checkbox to the far left of the offer line and then select **Apply to selected** to apply it.

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 the value, the yellow background disappears.

4. If some of the cart options were left blank in the template, make your selections in the offer manually (and in the other offers in the cart, if applicable. In this case, you'll have to open the offers one-by-one).



The template applied to the cart options

To fill in the cart options manually:

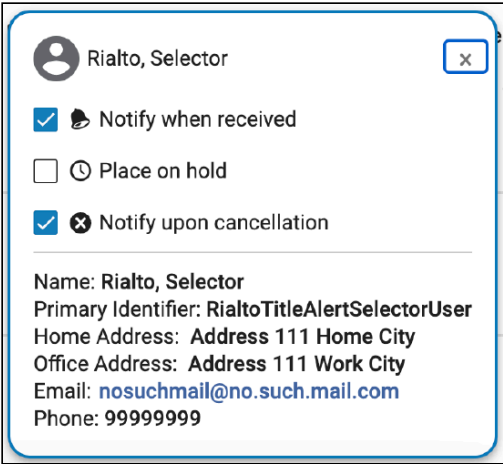
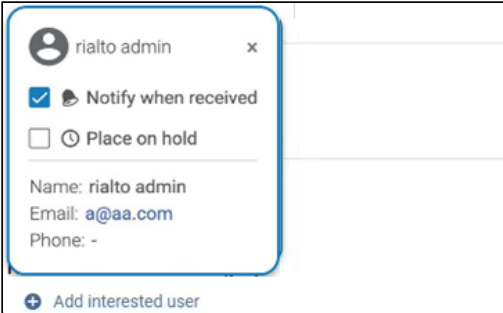
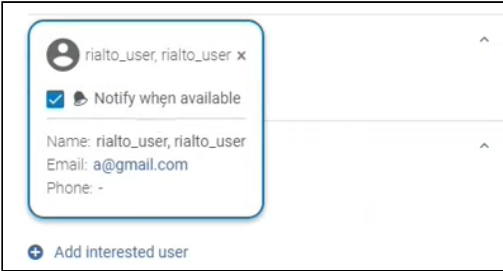
1. In the list of offers, click anywhere on the offer row, except the offer name. The Details pane opens for that offer.
2. In the right pane, select the **Ordering Library**. The cart is now enabled.
3. Fill in the cart options as per the below:

Shopping Cart Options

Cart Option	Description
Allow Duplicate	<p>An optional Allow Duplicate checkbox can be enabled for use in the Cart and Order's Awaiting Approval. When enabled, a checkbox is displayed at the top of all cart values and when checked "allows" items with holdings to be submitted in the order. If a cart item has a holding attached to it and the user did not select the checkbox, a message appears to let the user know the order may not go through after a final holdings check. If you are part of a consortia, Network Zone holdings will also be included in the check.</p> <p>On cart confirmation, after all holdings have been identified, you are prompted to check the box to allow the order to proceed or remove the item from the cart.</p> <p>This feature can be enabled or disabled by system administrators from Other Settings table on the Rialto Configuration page.</p>
Shelving Library / Location	<p>Select the shelving location (for print offers only). Within the dropdown you can type in the location name, or expand the directory to find the correct one.</p> <hr/> <p>Note</p> <p>To apply shelving location and funds to multiple offers in bulk, see Applying Library and Funds to Multiple Offers in Bulk.</p> <hr/>
Quantity	<p>Indicate the number of copies you are ordering.</p> <p>For eBooks, ordering multiple copies is enabled for EBC and EBSCO , only if the offer's license is 'single user' or 'three users' or 'non-linear/concurrent' (i.e., not 'unlimited').</p> <p>If you want to increase the number of copies, you can easily select another copy of the title, see Navigating to Work from Cart.</p> <p>To order copies for several different libraries, see Ordering Copies for Different Shelving Locations.</p>

Cart Option	Description
	<p>For Alibris orders, the quantity is fixed at "1" and cannot be modified; see Working with Alibris.</p>
Fund Assigned	<p>Select the fund that will be encumbered. Within the dropdown you can type in the fund name or the fund code, or expand the directory to find the correct one.</p> <hr/> <p>Note</p> <p>Only one fund may be associated with any given cart item. (This is different from the Alma PO line, to which multiple funds can be added).</p> <hr/> <p>After choosing the fund, its current available balance is displayed below. (for details, see Managing Funds and Ledgers).</p> <hr/> <p>Note</p> <p>Only active funds with an available balance or overencumbrance allowed will appear as options in the dropdown.</p> <hr/> <p>The right-hand pane shows the applied fund's usage and the available balance. Note that this summary does not reflect the current amount being encumbered. If multiple funds are used within the cart, you can view them by selecting the toggle next to the fund name.</p> <hr/> <p>Note</p> <p>To apply shelving location and funds to multiple offers in bulk, see Applying Library and Funds to Multiple Offers in Bulk.</p> <hr/>
Interested users	<p>Optionally, indicate the name(s) of the patron (institution staff or students) who requested this offer. If you have permissions to access the "Users" menu within Alma, you may also search the interested users field by email address (full address must be entered).</p> <hr/> <p>Note</p> <p>Interested users have a limit of 5 persons on templates, there is no limit in the cart.</p> <hr/> <p>By default, Rialto will respect your Alma configurations for interested user notification preferences. The default selection of interested user notification options can be defined by the institution in the configuration menu (Configuration Menu > Acquisitions > General > Other Settings).</p> <p>If the cart offer was added due to a purchase request or borrowing request, the interested users are automatically carried over from the requests. In this case, Rialto will reflect the notification method entered there.</p> <p>However, once in the cart you can make any modification to the interested user notification types, or add additional interested users. When selecting the interested user, the notification actions can be assigned as follows:</p> <ul style="list-style-type: none"> • For electronic items, the "Notify when available" option is selected by default. The system will notify the interested user when the item available. • For physical items, the "Notify when received" is selected by default, but not "Place on hold". You can select it, if needed. • Select notify upon cancellation to send your interested user a message if the order has been cancelled. <p>See When is a notification sent to interested users for more information on Alma notifications for interested users.</p>

Cart Option	Description
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Note

The notification actions are displayed only when an email address is available for the interested user.

Note that in the collapsed view in the Details pane, the icons for the selected notification types appear only when they are selected. When the notification type is not selected, the icon does not appear.



For information on interested users in PO lines, see [Interested Users Section](#).

Notes

Optionally, click **Add Note** to add a note. You can select between these 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

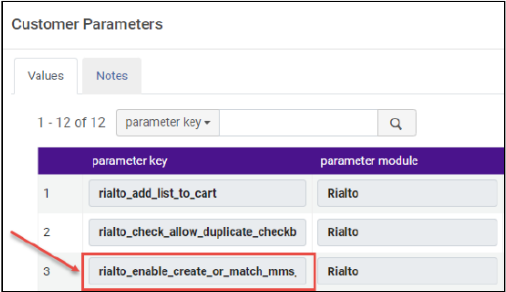
Cart Option	Description
	<p>not sent to the vendor.</p> <ul style="list-style-type: none"> If you are an approver, select Note to Vendor and write any notes about the ordered item to the vendor. <hr/> <p>Note</p> <ul style="list-style-type: none"> Note to Vendor is a note for Ex Libris to review during order processing. This is typically used for print titles. Keep in mind that for ebooks this will delay automatic activation. Note to Vendor is not available for Alibris orders; see Working with Alibris. <hr/> <ul style="list-style-type: none"> 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.
No Physical Processing	<p>(Only print offers) Select to instruct the vendor to skip all physical processing steps, such as protective films, spine labeling, etc. that are part of your contractual agreement. Select this option to complete your own processing, or to speed up order shipping.</p> <hr/> <p>Note</p> <p>When selecting this option, it will not have an impact on the MARC delivery.</p> <hr/>
Rush	<hr/> <p>Note</p> <p>This option is configured by Alma administrator.</p> <hr/> <p>(Only print offers) Select to instruct the vendor that rush handling applies. This means the following:</p> <ul style="list-style-type: none"> No physical processing applies to the order, because the order goes directly to your institution, skipping the processing facility. An expedited shipping fee might apply to the order, if configured as part of the Terms of Use. You will see it on the invoice. For details, see Configuring Terms of Use. Displaying/Not Displaying of this option is controlled by the following customer parameter: rialto_rush_checkout_enabled.
No MARC record	<p>(Only print offers) Select to instruct the vendor that no MARC record should be created, for example, when ordering another copy of a offer already owned by your institution. The vendor will still apply the other processing steps that are part of your agreement.</p> <p>If you do not select this option, the MARC records are sent nightly via an FTP transfer.</p>
No Spine Label	<p>(Only print offers) Select to instruct the vendor to skip the spine label. The vendor will still apply the other physical processing steps.</p>
Override Call Number	<p>(Only print offers) Select to instruct the vendor to replace the existing call number. Enter your own call number in the field that opens.</p>
Item Policy	<p>If your institution requires, select the item fulfillment policy. For more information, see Adding Fulfillment Policies.</p>
Reporting Code	<p>Select up to five reporting codes. Reporting codes can be used for analyzing acquisitions in subsequent reporting. For more information, see Configuring Reporting Codes. These reporting codes will be assigned to the PO line.</p> <p>The order of Report Code values is inherited from the Reporting Codes table, and can be set from there. Note that if the</p>

Cart Option	Description																
	<p>values were changed in the Reporting Codes table, you need to refresh the Cart for the list of Report Codes to display the new order.</p>																
Route cart item into category	<hr/> <p>Note</p> <p>The values in this field are configured by the institution. If the values were not configured by the institution, this field does not appear in the cart. Your Alma administrator can configure the values for your institution from the Cart Routing section of the Rialto Configuration page.</p> <hr/> <p>Selecting an option from this category allows the selection staff to assign a unique value for acquisitions to filter by on the Orders Awaiting Approval Task List. For more information, please watch the cart routing training.</p>																
Bibliographic Record Match Prediction	<p>When record matching is enabled purchasers will be able to proactively review matched records in the cart to ensure collection accuracy prior to checking out. "Bibliographic Record Match Prediction" appears as an expandable field and will display either:</p> <ul style="list-style-type: none"> A message indicating that no match has been found, and a new record will be created on checkout for the cart item <div data-bbox="289 804 789 1041" data-label="Image"> <p>This screenshot shows the 'Bibliographic Record Match Prediction' field in a user interface. It includes a header 'Interested users' with an expand/collapse arrow and a '+ Add interested user' button. Below the header, the text reads: 'No matching record was found, a brief record will be created upon checkout.'</p> </div> <p>or</p> <ul style="list-style-type: none"> A match to a record already present in the institution zone, available within the community zone, or network zone (depending on library configurations and holdings). <div data-bbox="289 1203 789 1757" data-label="Image"> <p>This screenshot shows the 'Bibliographic Record Match Prediction' field with a list of matched records. It includes the same 'Interested users' header and '+ Add interested user' button. Below, it shows a 'Match from' section with a list of records:</p> <table border="1"> <thead> <tr> <th>Record ID</th> <th>Record Details</th> </tr> </thead> <tbody> <tr> <td>LDR</td> <td>nam a22 Ka 4500</td> </tr> <tr> <td>001</td> <td>9952424849401401</td> </tr> <tr> <td>008</td> <td>s xxu eng d</td> </tr> <tr> <td>020</td> <td>__ a 9781315663357</td> </tr> <tr> <td>035</td> <td>__ a 3569786</td> </tr> <tr> <td>100</td> <td>__ a Shiraev, Eric B.; Sobel, Richard</td> </tr> <tr> <td>245</td> <td>__ a People and Their Opinions</td> </tr> </tbody> </table> </div> <p>Rialto will search for records based on title, author, and ISBN from the record as a whole. When a community zone match is found, we will use provider identifiers (when present) to match against the correct collection. The match retrieval also depends on the format of the item in the cart and the record. Rialto will respect matching electronic and print records respectively.</p>	Record ID	Record Details	LDR	nam a22 Ka 4500	001	9952424849401401	008	s xxu eng d	020	__ a 9781315663357	035	__ a 3569786	100	__ a Shiraev, Eric B.; Sobel, Richard	245	__ a People and Their Opinions
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Cart Option	Description
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When this feature is enabled, Rialto also prevents brief record creation at the time an offer is added to the cart.

Enabling or disabling this feature is handled through the customer parameter: "rialto_enable_create_or_match_mms_on_checkout" in **Configuration > Collection Development > General > Other Settings**. By default, the parameter is set to **true**.



When an offer in the cart has matched to the Institution or Network Zones, a "Relink" option will be present. If no match has been found a "Manual Link" option is present. When either link is selected, a large sliding panel will open allowing for a repository search. If a match was found in the cart, the panel will display all other record options found within the corresponding zone, so that the approver can quickly locate other options. If no match was found in the cart, then the approver can search the repository for a matching record.

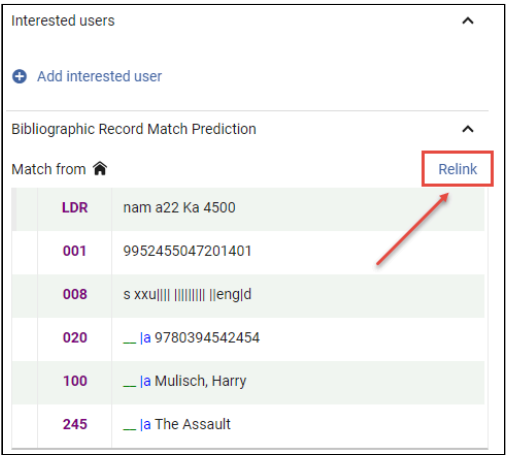
Note

Users will **not** have the option to relink Community Zone records, or Ebook Central upgrades, as unique workflows and configurations are in place for both of these scenarios.

For example:

- If a match to a record is already present in the institution zone or network zone (depending on library configurations and holdings), users can relink the cart item to an alternate MMS ID during checkout by selecting the **Relink** button.

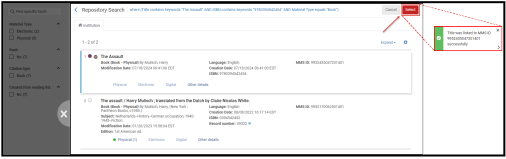
Relinking
Cart Item
Record
Matching



Relink button

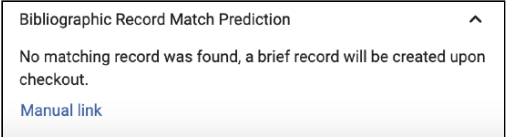
- Selecting the Relink button opens the Repository Search in a sliding panel.
- Select the item (Title) to relink to a different MMS ID and click **Select**. The Title is successfully linked to the MMS ID.

Cart Option	Description
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Repository Search - Select Title to Relink to MMS ID

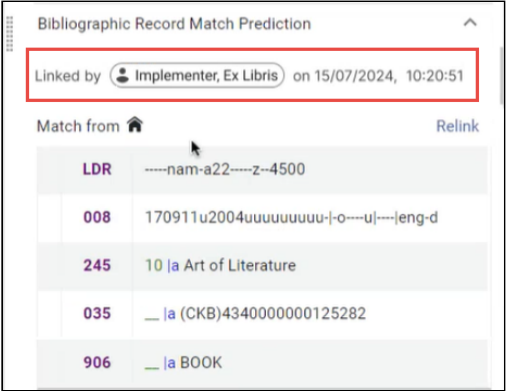
- When a record match is not found for a cart item, the purchaser is presented the option to "Manually Link" the cart item to a MMS ID



Manual link

- The same Repository Search will open where the user can search for an MMS ID to link the cart item to.
- When a match is not found or selected, a new record is created upon checkout.

After an item has been relinked, the Cart, Task List, and Order History pages display a notification detailing the action. The notification includes a message confirming the relink/manual link, the user's name who performed the action, and the date it was completed.



Relink User Indication

Restore Original MMS ID after Relinking

A **Restore** button appears after a user performs a relink, enabling retrieval of the original MMS ID that was matched. The restore action reverts to the original bibliographic record (BIB) and includes a confirmation popup to ensure user intent. Upon completion, a success or failure message is displayed to indicate the outcome of the action.



Restore button workflow

Refining Large Carts

To help refine large shopping carts, use the facets.

Ordering library
Academic Technology (2)
Student Computing Serv. (1)

Material Type
Electronic (1)
Physical (2)

Rush
No (2)
Yes (1)

Fund
2022 (3)

Citation type
Book (3)

Created from reading list
No (3)

Facet by cart values. Multiple ordering libraries reflected above.

Shopping Cart (1-3 of 3)

Sort by Date Added

Selective checkout

3 Items, Total 756.00 USD | Send selected to approval | Checkout selected

1 new selected

Item	Title	Material Type	Quantity	Fund	Price
1	The Aging Skeleton	Ebook Central	3	Fund: 2022	252.00 USD
2	Scary Cases in Challenging	Paperback	1	Academic Technology	99.95 USD
3	Spooky archeology: myth and the science of the past	Paperback	1	Student Computing Services: Materials Library (matlib)	99.95 USD

The Aging Skeleton by Clifford Rosen
252.00 USD

Scary Cases in Challenging by Peter, Michael D., Grundfest, Kenneth M. 2017, Floral Publishing, Inc.

Spooky archeology: myth and the science of the past / Jeb J. Card by Card, Jeb J., author. 2019, University of New Mexico Press. Edition: First paperback edition.

Location and Fund

Ordering Library * Academic Technology *
Qty: 3 * Single User
Fund * 2022 (2022Fund, FY 2021-21) *
Available balance: 97,091.81 USD

Reporting codes
Choose reporting code *

Ordering Copies for Multiple Shelving Locations

The following roles are required to order copies for multiple libraries:

- Rialto Manager, Purchasing Operator

You may want to order several copies of a single offer, where each copy is destined for another shelving location in your institution. You can do this from the Shopping Cart page. Each copy generates a separate PO line in the Purchase Order.

To order copies of an offer for multiple libraries:

1. On the Shopping Cart page (



), in the row actions list of the offer, select **Duplicate**. The offer is duplicated.

Note

When you duplicate an offer, all its cart information is copied over to the new offer, including information that might not be relevant for the new offer, such as shelving location. Make sure to review the new offer and substitute all the unnecessary information with the correct information.

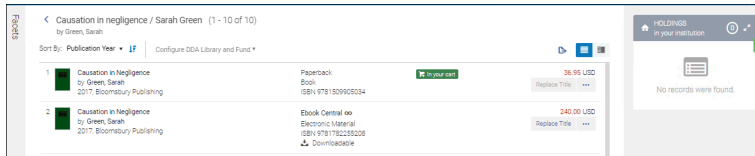
2. Open the new offer and edit its information as necessary. Then proceed as described in [Checking Out the Cart](#) above.


Navigating to a Work from the Cart

You can navigate to a list of other offers for a [work](#) from the cart, in order to confirm that this is the best offer or to choose an alternate/additional offer in the same work. If you are an Approver, you can do this from your own cart, or from a cart that you are currently approving.

To navigate to the offer list for a work:

1. Click on the title of the item in the cart or select **Display Title in Market** in the row actions list.
The list of offers for the work opens. The item currently in the cart is marked with an **In your cart** badge.
2. For all users, 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. If you are an Approver, to replace the existing offer with a related offer of the work, in the row actions list in the selector's cart that you are actively working on approving, select **Add to Selector's Cart**.
4. To return to the cart, at the top of the page, select  beside the name of the work. All the information selected in the cart remains unchanged.

Submitting the Cart to Approval or Checking Out

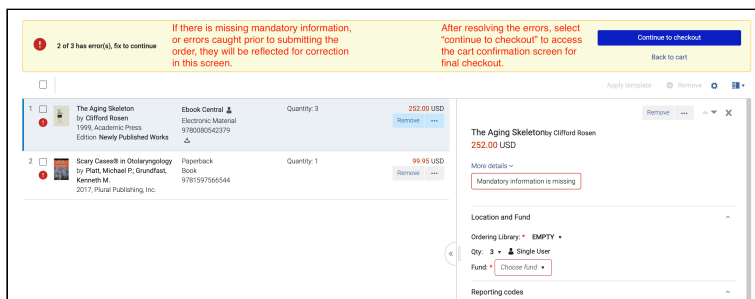
To submit the cart to approval and check out:

1. Once all the required cart options are filled in, select the button that appears:
 - If you are part of the selection staff, select **Submit to Approval** to send the order to review by the Purchase Manager. Once the order is approved, Rialto generates the Purchase Order and submits it to the vendor. To monitor the progression of your order across the approval workflow, use [Order History page](#).
 - If you are part of the purchasing staff, select **Check Out Selected** to submit the Rialto order to the vendor.
 - In some cases, certain users might see both buttons **Submit to Approval** and **Checkout Selected**, as institutions may want to allow Purchasing Operator roles to submit an order for secondary approval, instead of submitting to the vendor directly. In these cases, proceed as instructed by your institution, or work with your Approvers to determine in which cases you can check out the cart and when you need to request approval.

Note

When both buttons appear, the **Submit to Approval** button is displayed as grayed-out (because it is secondary to the **Checkout Selected** button). But you can still select it.

2. If there are errors in the cart prior to submitting to vendor, they are caught on the errors page:



The



Alert icon indicates that information is missing or is incorrect. The icon appears in the following cases:

- When the order does not have a location or fund selected and they need to be selected,

- When the selected fund is out of budget, and needs to be replaced with an alternate,
 - When the offer is no longer available in the market and needs to be replaced or removed,
 - When you do not have access to the platform for the offer and the offer needs to be removed or replaced,
 - When the MMS ID is invalid. This occurs when an item was added to the cart, but then its brief record has been deleted in Alma. The offer needs to be removed or replaced.
3. If you have submitted an order for approval in error, you can reject or move the offer back to your cart to continue editing from the **Order History** page. See [Monitoring the Order Status](#) for more details.
 4. Select **Continue to checkout** in the prompt message to continue to cart submission.

To remove an offer from the cart:

- In the Shopping Cart page, select the offer(s) you want to delete. Then, at the top right, select **Remove**.

Personalized and Institution-level Cart Customization

The following customizations can be implemented on the Cart page:

- Any user can configure the display of detailed information that appears in the **Details** pane about the selected item in the cart. They can choose to hide sections of information that are redundant for their work, and/or change the order in which the sections appear. Users with the role of Rialto Administrator can also configure the default settings for the entire institution.

< Sections Customization
Apply
×

Customize the Order and Visibility of Record Sections i

- 1 Title information
- 2 Location and Fund
- ☰ 3 Item policy
- ☰ 4 Reporting codes
- ☰ 5 Route cart item into category
- ☰ 6 Shelf ready
- ☰ 7 Notes
- ☰ 8 Interested users
- ☰ 9 Bibliographic Record Match Prediction

↻
Reset to default

- Any user can configure the facet display. They can choose to hide facets that are redundant for their work, and/or change the order in which the facets appear in the **Facets** pane. Users with the role of Rialto Administrator can also configure the default facet settings for the entire institution.
- Users with the role of Rialto Administrator can configure which of the Cart fields are mandatory. This is configured for the entire institution.

These settings can be accessed by selecting



. For additional information, see [Institution-level Customizations](#). For general information about customization settings, see [New Layout](#) in the Alma documentation.