

## Rialto 2022 Roadmap

### Highlights

#### Enhancements

Rialto continues to build functionality and enhancements to add efficiencies and tools for collaboration to create a seamless selection and acquisition workflow.

Q1 2022	Q2 2022	Q3 2022	Q4 2022
<ul style="list-style-type: none"> <li><a href="#">EBA Pool Builder</a></li> <li><a href="#">DDA Holdings Sync</a></li> <li><a href="#">Improved Title Metadata</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Title Alerts</a></li> <li><a href="#">Advanced Search</a></li> <li><a href="#">Enhanced Selection Plan History &amp; Testing</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Faculty Title Alerts</a></li> <li><a href="#">Enhanced Deposit Accounts</a></li> <li><a href="#">Search from Alma Reading List</a></li> <li><a href="#">EBA Closure &amp; Renewal</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Community Selection Plans</a></li> <li><a href="#">Order Cancellation</a></li> </ul>

#### Content

Rialto is platform-neutral with content from thousands of publishers as well as many digital publishers and aggregator platforms. As a comprehensive academic marketplace, Rialto is committed to the continued expansion of its offerings of publisher digital platforms and commercial models to provide librarians and their patrons with the most choice possible.

Q1 2022	Q4 2022
<p>New publisher digital platforms:</p> <ul style="list-style-type: none"> <li>John Benjamins Pub Direct</li> <li>Gale (NA) Pub Direct</li> </ul>	<p>New publisher digital platforms:</p> <ul style="list-style-type: none"> <li>UNEBook Pub Direct</li> </ul>

#### Q1 2022 Enhancements

## EBA Pool Builder

What's new	Highlights	Impact
<p>A pool builder tool uses the Rialto recommendation engine to suggest the best titles to create an initial EBA pool. This is relevant for libraries using EBA on Rialto that choose their initial EBA pools.</p>	<ul style="list-style-type: none"> <li>• <b>Build new pool</b> tool allows defining:               <ul style="list-style-type: none"> <li>◦ Query to limit titles</li> <li>◦ Ranking to boost the best results</li> <li>◦ Target pool size (based on value of titles)</li> </ul> </li> <li>• Users may iterate on the query, evaluating and editing based on the suggested results.</li> <li>• When a good set of results is found, users may export as a spreadsheet to further refine and send to the platform.</li> <li>• Initially used for Taylor &amp; Francis EBA agreements in which libraries choose the initial pool.</li> </ul>	<p>Rather than choosing from a large title's list in spreadsheets, libraries can begin their EBA program with profiled, recommended titles from Rialto. Libraries will define the profile—both the query and ranking method—and let Rialto suggest the best titles for their target pool size.</p>

## DDA Holdings Sync

What's new	Highlights	Impact
<p>When a library using Ebook Central Upload Holdings makes changes to their DDA pool, those changes will be communicated back to Rialto and Alma.</p>	<ul style="list-style-type: none"> <li>• Automated titles sync between Ebook Central and Rialto DDA pool.</li> <li>• Titles added to or removed from the DDA pool by the platform will push to Rialto.</li> <li>• Available for libraries using Ebook Central Upload Holdings integration.</li> </ul>	<p>Libraries can now make changes on the platform side and have them automatically synchronized to Rialto and Alma, allowing for additional platform-side profiling or cleanup without having to file a case with Rialto support.</p>

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## Improved Title Metadata

What's new	Highlights	Impact
<p>Offer results will have revised icons and information display. Offer details will include additional title metadata.</p>	<ul style="list-style-type: none"><li>• Vivid <b>E</b> and <b>P</b> icons for quick identification of the format.</li><li>• <b>In a collection</b> badge replaced with space-saving icon.</li><li>• New icons for <b>STL</b> and <b>ATO</b> eligibility.</li><li>• Additional offer metadata: dates, license terms, series information, and more.</li><li>• Full labeling of all metadata fields for increased clarity.</li><li>• Overall arrangement pass for a more scannable display throughout.</li></ul>	<p>Search results feature more compressed, readable displays. Repetitive information (such as format) has been compressed to make scanning lists easier. Expanded offer metadata assists when evaluating a result and tuning queries.</p>

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## Q2 2022 Enhancements

## Title Alerts

What's new	Highlights	Impact
<p>Lists of titles created according to a library-defined query and ranking. New lists can be drawn up at predefined intervals—weekly, biweekly, or monthly—for review by library staff.</p>	<ul style="list-style-type: none"> <li>Title alerts can be created according to a library-defined query, ranking, maximum number of titles, and interval.</li> <li>At each interval, Rialto will attach a new list to the alert for staff review.</li> <li>Title alerts may be managed by individual staff members or shared between multiple staff.</li> <li>Staff may optionally be notified via email when a new list is created.</li> <li>Lists may be reviewed individually or as a merged list of all alerts.</li> <li>Lists may be marked “done” to indicate that they’ve been reviewed.</li> </ul>	<p>Where Rialto recommendation feeds are unending streams of best-ranked titles according to a profile, Title Alerts are finite lists drawn up at specified intervals (similar to other systems’ “notifications” functionality). Users can optionally be emailed when new alerts are created.</p>

## Advanced Search

What's new	Highlights	Impact
<p>Advanced search allows searching the Rialto marketplace using all options available in the query builder.</p>	<ul style="list-style-type: none"> <li>Query builder available for advanced searches.</li> <li>All current and future query builder filters are available as search indexes.</li> <li>Results displayed as in simple searches today, but narrowed to only include works and offers that match the search query.</li> </ul>	<p>Staff may use the query builder interface to search multiple indexes simultaneously. The query builder scales from user-friendly multi-index searches to powerful Boolean searches.</p>

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## Enhanced Selection Plan History & Testing

What's new	Highlights	Impact
Selection Plans have new features to assist in setup, testing, and monitoring to streamline configuration and transparency.	<ul style="list-style-type: none"><li>• Users can view the query used to generate a snapshot when viewing a plan's historical runs.</li><li>• <b>Last run</b> date is visible on the list of Selection Plans to easily identify active plans.</li><li>• The new <b>Test</b> tab in selection plans enables rule testing to ensure each rule will behave as expected before making changes.</li><li>• Rules may be duplicated to assist rapid setup and reduce errors.</li><li>• Rules may be activated and deactivated to a plan without losing configuration.</li></ul>	Administrators may see more information about past queries and when they ran, as well as enhanced testing features to increase predictability and confidence when making changes.

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## Q3 2022 Enhancements

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### Faculty Title Alerts

What's new	Highlights	Impact
Title alerts may be shared with faculty, who will be able to review title alert lists and recommend titles to be purchased.	<ul style="list-style-type: none"><li>• Title alerts will be shareable with one or more end users (typically faculty).</li><li>• Simplified interface for faculty to review all title results, including all available brief and expanded title information.</li><li>• Recommended purchases will be routed to new task list for consolidated approval. Task list may be shared between staff based on facets or handled directly by purchasers.</li><li>• Cart templates for each title alert allows for swift checkout once a purchase recommendation has been approved.</li></ul>	Librarians may improve faculty engagement by creating targeted title alerts of interest to specific faculty. Faculty will have a streamlined interface for reviewing new titles and recommending purchases. A single task list will consolidate all purchase recommendations for efficient approval.

## Enhanced Deposit Accounts

What's new	Highlights	Impact
More flexible, self-managed deposit accounts for electronic transactions.	<ul style="list-style-type: none"> <li>• Deposit accounts will support all electronic purchase types—including firm orders, DDA, ATO, and STL transactions.</li> <li>• Deposit accounts available in the cart as a payment alternative to local funds.</li> <li>• Invoice Portal will include deposit account information:               <ul style="list-style-type: none"> <li>◦ Real-time balances, including pending transactions.</li> <li>◦ Self-service ability to add funds to an account.</li> </ul> </li> </ul>	Libraries will now be able to use their deposit funds to pay for firm order purchases in addition to DDA, and set rules to define what sorts of purchases use a deposit fund. Real-time monitoring and management of deposit balances will be merged into the Invoice Portal.

## Search from Alma Reading List

What's new	Highlights	Impact
Rialto may be searched from Alma Reading List management, allowing staff to order reading list materials without creating purchase requests.	<ul style="list-style-type: none"> <li>• From the <b>Edit Reading List</b> page in Alma, staff with Rialto roles have a new action to search Rialto for each citation.</li> <li>• Launching a search allows staff to find matches in the marketplace, edit the search, and add offers to the Rialto cart or list.</li> <li>• Selectors may request purchase approval, while purchasers may order directly (in the standard ordering workflow).</li> <li>• Purchased materials will automatically be linked to reading list citations.</li> </ul>	Libraries with staff that both manage reading lists and search Rialto may add titles to their cart without losing the reading list context. This streamlines the workflow for libraries whose staff both manage reading lists and order in Rialto without purchase requests.

## EBA Closure & Renewal

What's new	Highlights	Impact
<p>When finishing an Evidence-Based Acquisitions program, Rialto will create order and invoice lines for all selected titles to facilitate tracking, cleanup, and analytics.</p>	<ul style="list-style-type: none"> <li>• Titles selected at program closure will automatically have order lines attached.               <ul style="list-style-type: none"> <li>◦ Orders will be attached to an EBA subaccount on the Rialto vendor.</li> </ul> </li> <li>• An invoice will be created with lines for each title.               <ul style="list-style-type: none"> <li>◦ Invoices will be flagged as <b>Prepaid</b> and <b>Internal</b> to avoid reporting to financial systems for payment.</li> </ul> </li> <li>• Order and invoice lines will contain pricing for each title.               <ul style="list-style-type: none"> <li>◦ Libraries will designate a <b>Prepaid</b> fund that is separate from the library budget.</li> </ul> </li> <li>• All transactions will be reportable through analytics.</li> </ul>	<p>Today, libraries must choose between cumbersome workflows to record what titles were chosen in EBA, or go without tracking this information. Rialto will automatically record order line information (to facilitate provenance and ownership tracking) and invoice information (for analytics such as cost per use) for all titles selected at the end of an EBA program.</p>

## Q4 2022 Enhancements

## Community Selection Plans

What's new	Highlights	Impact
Selection plans and recommendation profiles may be shared with and downloaded from the community.	<ul style="list-style-type: none"> <li>• New option to share a selection plan or recommendation feed with the Rialto community.</li> <li>• Shared recommendation feeds will store the full query.</li> <li>• Shared selection plans will store the full query and rules, but not any library-specific information (such as cart fields).</li> <li>• Users may preview shared plans and save download them to the local institution.</li> </ul>	Libraries can quick-start their selection plans or recommendation profiles by starting from shared queries and rules. Sharing can also be used to post a plan as a template for one's own and other institutions.

## Order Cancellation

What's new	Highlights	Impact
Orders that are eligible for cancellation may be initiated from within Rialto. Orders cancelled by ProQuest (including library-requested) will automatically trigger the Alma order line cancellation process.	<ul style="list-style-type: none"> <li>• From the Rialto Order History page, eligible orders may be cancelled.</li> <li>• The Alma order line cancellation will be automatically triggered by a cancelled Rialto order.</li> <li>• Alma order line cancellation will: <ul style="list-style-type: none"> <li>◦ Mark the POL as cancelled.</li> <li>◦ Clean up any undelivered inventory.</li> <li>◦ Clean up MARC records not linked to other inventory.</li> </ul> </li> <li>• Cancelled orders may still be monitored via Rialto Order History, including the Alma cancelled order status.</li> </ul>	Rather than requiring libraries to monitor the order history for "To be cancelled" orders, Rialto will automatically initiate the Alma order cancellation process on the local order line.

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