Order Approval

Hello, in this tutorial you will learn how to view and approve orders submitted by selectors.

You must have the Rialto Manager role in order to approve orders. For this session you are logged in as a Rialto Manager.

To approve a purchase order go to Market > Orders Awaiting Approval. Here you can see a task list of all items waiting for approval. This list includes all orders submitted by all selectors in your institution.

To focus on the items you want to approve now, you can add facets to narrow the list, such as by selector, fund, etc, depending on what you are responsible for. To review an item click on a row to open the information panel. If you click on the row action tool, you have options to Reject, Add template, or Display Title in Market.

Some offers will have a “Related activity” indicator. This indicator appears when you have holdings for some version of that offer, or if there is other activity on any other offer that is part of the same group, such as another offer in someone’s cart, the offer being chosen as part of a selection plan, etc. You can select “View all” to see all offers in the group and any badges that show significant activity.

Within the order request you can edit any cart fields. In order to approve an order request, you must enter an ordering library and fund. For print, you must also enter a shelving location. You can make any changes or additions to selector-submitted information. Cart fields for print and electronic items are described in the “Ordering” tutorial in the Knowledge Center.

Note, that as soon as you make any changes to an order it will automatically be assigned to you, as identified by the indicator in the task list. This is only informative and does not prevent others from making changes—only informs them that you have begun editing this item. If you make changes to an order that is assigned to someone else, you will receive a popup indicating that order will now be assigned to you.

Bulk actions will become active when you select one or more items. You can use these actions to apply templates, reject, or approve selected items. Alternatively, you can work from the row actions tool on each item or detail page.

If there are items from the selector that you do not want to proceed with you can reject them using bulk actions, or you can open the row action tool and choose "Reject". When you reject an item, you will be prompted to choose a reason. Selectors will be able to see their rejected items from the order history page, along with the reject reason you selected. For more information about order history please watch the Order History tutorial in the Knowledge Center.

When you're ready, you can select the items you want to approve, and then click "Approve selected".

When you have finished entering all information for each item, you will see a checkout summary including a brief view of the selected items. Here you can return to the list to make any further changes or click "Confirm" to place the order. Once confirmed, order lines will be created in Alma and ProQuest will begin processing the order. You can also monitor the current order status in the Order History page. For more information about order history please watch the Order History tutorial in the Knowledge Center.