

Selection Plan

Hello, in this tutorial you will learn what selection plans are and how to create them.

Selection plans are an automated purchasing plan based on a query, rules, and a ranking profile which generate a list of best-fit offers for your institution to purchase, add to DDA, or both at a set time interval. They are Rialto's innovative approach for legacy or existing approval plans, by finding the best resources based on your profile and introducing caps to directly manage how much is spent.

If you are interested in setting up a selection plan for purchasing, DDA, or both, reach out to ProQuest to begin the setup. While you can configure and maintain all aspects of your profile in Rialto, consultants are available to aid you even after initial configuration.

To create a selection plan you will first need to know how to build a query and ranking profile. Please watch the corresponding tutorials for more information about these processes.

To create or edit a Selection Plan you'll go to Market > Selection Plan. Here you can see a list of all existing plans at your institution as well as edit them if necessary. To create a new plan click "Add New Plan". You'll be prompted to enter a title... then click "Add".

You'll be brought to the edit page for Selection Plans. This consists of a query builder, rules, and ranking selection. You can see information about the plan, and click on the "Selection Plans" header for more details. Set the frequency of actions, which is how long you have to review titles before they are automatically purchased or added to DDA, and set the day of the week that those actions will be performed.

When creating a plan make sure that it has been toggled to inactive. This will prevent any purchasing or adding to DDA before you've tested and finalized the plan. Even once a plan is set up, you can toggle it to inactive if you need to pause or make any changes.

You can also add a description. Enter your desired filters to define results that will be eligible for purchase or adding to your DDA pool. For more information about how build a query please watch the Query Builder tutorial video. Once your query is built you can apply a Ranking profile, for more information about Rankings please watch the Ranking Profile session. Click the "run" icon to test your query.

With the query and ranking set up, Rialto now has a list of offers, sorted with the best results at the top. Next you'll add Rules that will allow you to define what the system will do with these results. Rules are used to evaluate each offer in order to choose whether to add it to your DDA pool, purchase it, or skip it. To add a new rule click "Add New Rule". Click on the auto populated line, and add a title. Now you'll add conditions, and what you want to happen, in this case you want to "Purchase title".

Decide the maximum amount you want to purchase each time this plan runs and enter that as the 'cap'. In this plan, a maximum of 300 dollars will be purchased per week. Next you'll set order line information for each order created as part of this plan. Set the ordering library, as well as the item policy and reporting codes if necessary. Please note the "P" icon next to Item Policy and Shelf Ready denote that they are for physical items only. Repeat this process for any additional rules for the plan, in this case you need to add a second rule to add electronic items to the DDA pool.

Caps for DDA work differently than for purchases. Rather than setting a price cap, you'll set the number of titles you want added your pool each time this plan runs. In this plan, no more than 100 titles will be added to the pool each week.

If you want to reorder your rules simply drag and drop them to rearrange. The order of the rules is important, an action will be taken on the first matching rule for each title. In this plan, Rialto will first check for DDA eligibility and will only move on to purchase if it can't be added to the pool.

Click "Save" when you're done, but do not activate your plan yet.

To review the titles that this plan will generate, you can click on the row action tool and select "Create Snapshot". This will generate a list of results based on your query and rules. Once the list is generated you will have a specific amount of time to review the results and reject any items that you do not want. Open the list of results by opening the row action tool again and select "Review".

In the list of results there is a column that shows you what rule was used to select an item. For more information about the plan and what rules were included, click on the "Selection Plans" header from the details panel. Here you can see basic information about the plan, and if you have the correct role, navigate to edit it. Below the edit link, you'll see the plan query, rules, and how the funds are used in these results.

Facets are available to help review the results. Faceting will not change what titles are purchased or added to DDA, but they help evaluate how many titles will be purchased based on rule, format, subject, and other criteria.

To reject an offer simply click the "Reject" button. If you decide later that you would like an item that was previously rejected, click on the row of the item, and click "Restore".

Once you've reviewed the results and are happy with your query and rules, you can activate the plan. Once active, this plan will automatically purchase or add titles to your DDA pool based on the frequency you've set.

Please contact ProQuest if you would like to set up a selection plan, need any help with queries or plan settings, if you would like to add a new transaction type such as DDA or purchasing, or would like to add a

new ordering library to an existing plan. Also reach out if you have any other questions, we are happy to help!