

Advanced Resource Sharing Configurations

For additional configuration tasks related to resource sharing, see:

- [Configuring a Resource Sharing Copyright Declaration](#)
- [Configuring Resource Sharing Copyright Statuses](#)

Configuring Temporary Item Creation Rules

To configure temporary item creation rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

A temporary item creation rule applies to a resource sharing library. A temporary item creation rule indicates that items coming from a specified partner must be moved to a specific location. You then configure a regular fulfillment rule which indicates that, for items in the temporary item creation rule, a specific Terms of Use must be invoked.

For example, you configure a temporary item creation rule which indicates that items coming from partner **A** must be moved to location **X**. You then configure a regular fulfillment rule which indicates that, for items in location **X** (the location specified in the temporary item creation rule), Terms of Use **Y** is to be invoked. For details on configuring regular fulfillment rules, see [Editing a Fulfillment Unit](#).

You configure temporary item creation rules on the Temporary Item Creation Rule page ([Configuration > Fulfillment > Library Management > Temporary Item Creation Rules](#)).

Temporary Item Creation Rule

Cancel Save

Temporary Item Creation

Name *

Description

Created By	Ex Libris	Created On	2017/08/13
Updated By	Ex Libris	Updated On	2017/08/13

Input Parameters

+ Add Parameter

No records were found.

Output Parameters

Location: Borrowing Resource Sharing Request

Item Policy: 1 Day Loan

Temporary Item Creation Rule Page

The **Temporary Item Creation Rules** option appears only when you are in the context of a Resource Sharing Library; select **Resource Sharing Library** from the **Configuring** filter on the Fulfillment Configuration page.

The temporary item creation rules list displays rules only for the library that is currently being configured.

Temporary item creation rules are configured similarly to regular fulfillment rules (see [Editing a Fulfillment Unit](#)), with the following differences:

- For **Input Parameters**, the following values are available:
 - Circulation desk
 - Days until due date – Enables you to create a rule based on the number of days from receiving an item until the item’s due date.

For example:

- **Name** = Days until due date
- **Operator** = Greater than
- **Value** = 15

These parameters indicate that if there are more than 15 days from the time of receiving the item until the due date, the item belongs to the location indicated in the **Location** field, according to the policy indicated in the **Item policy** field. The **Location** and **Item policy** fields are located in the **Output Parameters** section.

- Resource sharing partner
- For **Output Parameters**, specify the Location to which to move the items, and the Item Policy to invoke. When working with an NCIP partner, the value in the Location field is used as the default location for the temporary item that is created when receiving a borrowing request.

Configuring Shipping Cost Lender Rules

To configure shipping cost lender rules, you must have one of the following roles:

- Fulfillment Administrator
- General System Administrator

Shipping cost lender rules enable you to configure the conditions under which shipping costs are applied to resource sharing lending requests.

To configure shipping cost lender rules:

1. On the Shipping Cost – Lender Rules List page (**Configuration > Fulfillment > Resource Sharing > Shipping Cost Lender Rules**), select **Add Rule**. The Shipping Cost – Lender Rules page appears.

Shipping Cost - Lender Rules

Cancel Save

Shipping Cost Lender Rule Editor

Name *

Description

Created By Ex Libris Created On 2017/08/20

Updated By Ex Libris Updated On 2017/08/20

Input Parameters

+ Add Parameter

No records were found.

Output Parameters

Shipping Cost * USD

Shipping Cost – Lender Rules Page

2. Enter a name for the rule in the **Name** field.
3. Configure input and output parameters in the relevant fields.
4. Select **Save**. The shipping cost rule appears on the Shipping Cost – Lender Rules List page.

Configuring Shipping Cost Borrower Rules

To configure shipping cost borrower rules, you must have one of the following roles:

- Fulfillment Administrator
- General System Administrator

Shipping cost borrower rules enable you to configure the conditions under which shipping costs are applied to resource sharing borrower requests.

To configure shipping cost borrower rules:

1. On the Shipping Cost – Borrower Rules List page ([Configuration > Fulfillment > Resource Sharing > Shipping Cost Borrower Rules](#)), select **Add Rule**. The Shipping Cost – Borrower Rules page appears.

Shipping Cost – Borrower Rules Page

2. Enter a name for the rule in the **Name** field.
3. Configure input and output parameters in the relevant fields.
4. Select **Save**. The shipping cost rule appears on the Shipping Cost – Borrower Rules List page.

Configuring Levels of Service

To configure levels of service, you must have one of the following roles:

- Fulfillment Services Operator
- Fulfillment Services Manager

You can configure the levels of service that are available for resource sharing requests on the Levels of Service page ([Configuration > Fulfillment > Resource Sharing > Levels of Service](#)).

Code Table

You are configuring: Ex Libris University [Change Organization Unit](#)

Level of Service

Table code: LevelOfService
 Patron Facing: No
 Customization mode: Entire table needs to be customized

Restore Default Translations

Filter: English

Enabled	Move Up	Move Down	Code	Description	Translation	Default Value	Updated By	Last Updated
<input checked="" type="checkbox"/>			WHEN_CONVENIENT	When Convenient	When Convenient	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			NORMAL_LOCAL	Normal (Local)	Normal (Local)	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			NORMAL_FULL	Normal (Full)	Normal (Full)	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			PRIORITY_LOCAL	Priority (Local)	Priority (Local)	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			PRIORITY_EXTENDED	Priority (Extended)	Priority (Extended)	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			RUSH_LOCAL	Rush (Local)	Rush (Local)	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			RUSH_EXTENDED	Rush (Extended)	Rush (Extended)	<input type="radio"/>	-	-

Levels of Service

After configuring the levels of service, you can set the field value in the Primo request form and the borrowing and lending requests. The field also appears on the resource sharing task lists ([Creating a Borrowing Request](#)) and when creating lending and borrowing rules.

For more information on Levels of Service, see the [Level of Service for Resource Sharing Requests](#) video (3:21).

Configuring Brief Audit Fields

To configure brief audit fields, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure which audit lines are visible in the resource sharing requests **History** tab on the Brief Audit Fields code table (**Configuration > Fulfillment > Resource Sharing > Brief Audit Fields**). You can enable or disable each field. See [Managing Resource Sharing Borrowing Requests](#) and [Managing Resource Sharing Lending Requests](#).

Code Table

You are configuring: Ex Libris University [Change Organization Unit](#)

Resource Sharing Audit Filter

Table code: ResourceSharingAuditFilter
 Patron Facing: No
 Customization mode: Entire table needs to be customized

Restore Default Translations

Filter: English

Enabled	Move Up	Move Down	Code	Description	Translation	Default Value	Updated By	Last Updated
<input checked="" type="checkbox"/>			PARTNER_RELATED_I	Partner Related Data	Partner Related Data	<input type="radio"/>	-	-
<input type="checkbox"/>			NOTE_TO_PARTNER_I	Note to Partner	Note to Partner	<input type="radio"/>	-	-
<input type="checkbox"/>			EXT_REQUEST_ID	External Request ID	External Request ID	<input type="radio"/>	-	-
<input type="checkbox"/>			DUE_DATE	Due Date	Due Date	<input type="radio"/>	-	-
<input type="checkbox"/>			DESIRED_DUE_DATE	Desired Due Date	Desired Due Date	<input type="radio"/>	-	-
<input type="checkbox"/>			ITEM_RETURN_DATE	Item Return Date	Item Return Date	<input type="radio"/>	-	-
<input type="checkbox"/>			RECALL_DATE	Recall Date	Recall Date	<input type="radio"/>	-	-

Configuring Resource Languages

To configure resource languages, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can enable or disable languages that appear in the **Language** drop down in the **Request Attributes** section of a resource sharing request, indicating the desired language of the item being requested. See [Managing Resource Sharing Borrowing Requests](#) and [Managing Resource Sharing Lending Requests](#).

Access the **Resource Languages** page (**Configuration > Fulfillment > Resource Sharing > Resource Languages**). You can enable or disable a language, reorder the languages, or edit the name of the language.

The screenshot shows the 'Resource Sharing Languages' configuration page. At the top, it indicates 'You are configuring: Ex Libris University' with a 'Change Organization Unit' link. Below this, the page title is 'Resource Sharing Languages' with a table code of 'ResourceSharingLanguages' and a description of 'Resource Sharing Borrowing Languages'. The 'Patron Facing' status is 'No' and the 'Customization mode' is 'Entire table needs to be customized'. A 'Restore Default Translations' button is visible. A filter is set to 'English'. The main table lists the following languages:

	Enabled	Move Up	Move Down	Code	Description	Translation	Default Value	Updated By	Last Updated
1	<input checked="" type="checkbox"/>			ab	Abkhazian	Abkhazian	<input type="radio"/>	-	-
2	<input checked="" type="checkbox"/>	▲	▼	aa	Afar	Afar	<input type="radio"/>	-	-
3	<input checked="" type="checkbox"/>	▲	▼	af	Afrikaans	Afrikaans	<input type="radio"/>	-	-
4	<input checked="" type="checkbox"/>	▲	▼	ak	Akan	Akan	<input type="radio"/>	-	-
5	<input checked="" type="checkbox"/>	▲	▼	sq	Albanian	Albanian	<input type="radio"/>	-	-
6	<input checked="" type="checkbox"/>	▲	▼	am	Amharic	Amharic	<input type="radio"/>	-	-

Resource Sharing Languages Page

Configuring Borrowing Request Statuses

To configure the borrowing request statuses, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

To customize the description and translation text of borrowing request statuses, access the Borrowing Request Statuses code table (**Configuration > Fulfillment > Resource Sharing > Borrowing Request Statuses**).

This page enables you to define the borrowing request's status text that is displayed in Rapido and on the requests list on the patron services page.

Code Table Cancel Customize

Borrowing RS Request Statuses Info Down Arrow

Table code: BorrowingRSRequestStatuses Table Description: Complete borrowing resource sharing request statuses list
 Patron Facing: Yes
 Customization mode: Specific rows can be customized

Customize All Restore Default Translations

Filter: English

Code	Description	Translation	Updated By	Last Updated
1	AUTOMATIC_RENEW	Automatic renew	Automatic renew	-
2	CANCEL_NOT_ACCEPTED	Cancel request not accepted	Cancel request not accepted	-
3	CANCELLED_BY_PATRON	Cancelled By Patron	Cancelled By Patron	-
4	CANCELLED	Cancelled by partner	Cancelled by partner	-
5	CANCEL_REQUESTED	Cancelled by staff	Cancelled by staff	-
6	REQUEST_CREATED_BOR	Created borrowing request	Created borrowing request	-
7	DECLARED_LOST	Declared lost by partner	Declared lost by partner	-
8	DELETED	Deleted	Deleted	-
9	RECEIVED_DIGITALLY	Digitally received by library	Digitally received by library	-
10	EXPIRED	Expired	Expired	-
11	EXPORT_TO_THIRD_PARTY	Exported to third party	Exported to third party	-

Borrowing Request Statuses

Configuring Request Reject Reasons

To configure the request reject reasons, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

To customize the description and translation text of request reject reasons, access the Automatic Locate Reject Reasons code table ([Configuration > Fulfillment > Resource Sharing > Automatic Locate Reject Reasons](#)).

This page enables you to define the request's reject text that is displayed in Primo and on the requests list on the patron services page.

Code Table Cancel Customize

You are configuring: Clean Training [Change Organization Unit](#)

Auto Locate Reject Reason Info Down Arrow

Table code: AutoLocateRejectReason Table Description: Auto Locate Reject Reason
 Patron Facing: Yes
 Customization mode: Entire table needs to be customized

Restore Default Translations

Filter: English

Enabled	Move Up	Move Down	Code	Description	Translation	Default Value	Updated By	Last Updated
<input checked="" type="checkbox"/>	▲	▼	LocateFails	Locate Fails	Locate Fails	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>	▲	▼	OnlyElectronicAvailable	Only Electronic Available	Only Electronic Available	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>	▲	▼	NoRequestableItems	No Requestable Items	No Requestable Items	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>	▲	▼	NoAvailableItems	No Available Items	No Available Items	<input type="radio"/>	-	-

Request Reject Reasons

Configuring Renew Reject Reasons

To configure the renew reject reasons, you must have one of the following roles:

- General System Administrator

- Fulfillment Administrator

To customize the description and translation text of renew reject reasons, access the Automatic Renew Reject Reasons code table (**Configuration > Fulfillment > Resource Sharing > Automatic Renew Reject Reasons**). For information on automatic renewal for Borrowing workflow profiles, see the **Automatic renew** step in [Workflow Profile Steps](#).

This page enables you to define the request's renewal rejection text that will be displayed in the Full Borrowing Info letter (code: FulBorrowingInfoLetter) when it is sent to the patron.

The screenshot shows the 'Auto Renew Reject Reasons' configuration page. At the top, there are 'Cancel' and 'Customize' buttons. Below that, a status bar indicates 'You are configuring: Clean Training change Organization Unit'. The main section is titled 'Auto Renew Reject Reasons' and includes a table with the following columns: Code, Description, Translation, Updated By, and Last Updated. There are also buttons for 'Customize All', 'Restore Default Translations', and a help icon.

Code	Description	Translation	Updated By	Last Updated
402338	Cannot be renewed, item is requested	Cannot be renewed, item is requested.	-	-
402339	Cannot be renewed, maximum renew	Cannot be renewed, maximum renew date (0) was exceeded.	-	-
402317	You are not allowed to renew a resou	You are not allowed to renew a resource sharing request.	-	-

Renew Reject Reasons