Managing Borrowing Requests

To manage resource sharing borrowing requests, you must have one of the following roles:

- Fulfillment Services Operator (in the scope of a resource sharing library)
- Fulfillment Services Manager (in the scope of a resource sharing library)

You can manage the workflow of existing resource sharing borrowing requests in the Borrowing Requests task list. This article explains how to find specific borrowing requests that require your attention, and the various actions you can take during the management process of each borrowing request.

In most systems, most borrowing requests are handled automatically until they reach the prospective lending library, but some require manual action for various reasons. You can identify these by their status and other properties.

Finding Requests that Require Handling

You can use the facets filtering system, the sort feature, and the secondary search to help you find the tasks you need to work with. The facets and sort features are common to all task lists. Secondary search is a special feature of the Resource Sharing task lists. In addition, you can open the Borrowing Requests page from one of the predefined filters in the Task Lists option of the persistent menu.

Note

In the New Layout, the **Assigned to** and **Activity Status** filters have been moved to the **Facets** panel.

Filtering Using Facets

You can filter the list of borrowing requests using the facets on the left side of the page. The facets include:

- **Labels** – Labels that are attached to requests
- **Active Partner** –The active partner in a request rota
- **Activity Status** – Active or Completed
- **Status** – Status of the borrowing request

  The following statuses indicate that the final step in the request is completed. Requests in these statuses may be removed.

  - Canceled by partner
  - Canceled by patron
  - Canceled by staff
  - Digitally received by library
  - Expired
  - Request completed — This is the final status before removal and may be manually set. If the request is for an ISO partner, there must be a reply from the partner before the status switches to Request completed.

The following are non-final (in-process) statuses of the request process:

- Conditional – Appears only when **Conditional** is enabled in the borrowing workflow profile. See Adding Workflow Profiles.
- Created borrowing request
- Damaged communicated – Appears only when **Damaged communicated** is enabled in the borrowing workflow profile. See Adding Workflow Profile.
- Declared lost by partner
- Expired
- Exported to third party
- Externally obtained
- Lender check in
- Loaned item to patron
- Locate failed
- Locate in process
- Lost communicated – Appears only when **Lost communicated** is enabled in the borrowing workflow profile. See Adding Workflow Profile.
- Mediated patron renewal
- Overdue request
- Pending approval
- Physically received by library
- Ready to be sent
- Recalled by partner
- Received – not for loan
- Rejected by partner
- Renew request not accepted
- Renew requested
- Renewed by partner
- Report damaged item to partner – Same meaning as Damaged communicated.
- Report lost item to partner – Same meaning as Lost communicated.
- Request accepted
- Request sent to partner
- Returned by patron
- Returned item to partner
- Shipped digitally
- Shipped physically
- Waiting for cancel response
- Will supply

- **Creation Date** – Date on which the request was created. Possible values are:
  - **Today** – Requests created on the current date
  - **2-3 days ago** – Requests created two or three days before the current date (excluding today and yesterday)
  - **4-7 days ago** – Requests created 4-7 days before the current date (in other words, excluding the above three options)
  - **8-30 days ago** – Requests created between 8 days and a month before the current date (in other words, excluding the above four options)

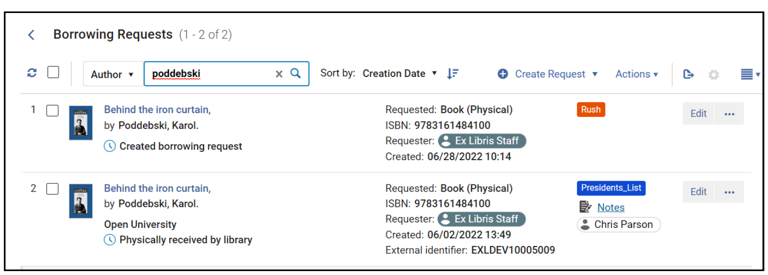
- **Older** – Requests created more than one month before the current date

- **Update Date** – Date on which the request was updated. Possible values are the same as those for the **Creation Date** facet.
- **Requested Format** – The format of the requested item. Options are: **Digital**, **Physical**, and **Physical non-returnable**
- **Supplied Format** – The format in which the requested item was supplied. Options are: **Digital**, **Physical**, **Physical non-returnable** and **Undefined**
- **Due Date** – The date by which the item must be delivered. Possible values are the same as those for the **Creation Date** facet.
- **Last Interest Date** – The date after which the requester has indicated that they are no longer interested in the item
- **Need Patron Information** – Requests for which mandatory information has not been supplied by the patron
- **General Messages** – Requests that contain general messages of **Type = Received.** You can dismiss and activate general messages from the request's **General Messages** tab (see Sending a General Message With a Resource Sharing Request).
- **Owning Library** – The library that owns the requested resource
- **Notes from Partner** – The requests with notes from the lending institution
- **Pickup Location** – Libraries, reading rooms, and personal delivery are all included in the facet
- **Level of Service** – The level of service assigned to the request
- **User Group** – The user group of the requester
- **Assignee** – The staff person to whom the request is assigned (including "Unassigned")
- **Event Name** – Status that is attached to the request by broker systems (such as BLDSS) that support request updates with Rapido

Secondary Search

The secondary-search feature enables you to search the current request list for requests that meet certain criteria. For example, you could search for a particular author's name in order to find all the requests in the list related to books by that author and hide all the other requests in the list.

Unlike the primary search feature, which is always available in the persistent search box, the secondary search does not cancel previously selected facets.



Secondary Search implemented

To perform a secondary search:

1. At the top of the request list, in the secondary-search controls, in the dropdown list, select the field to search by.

2. In the text box, enter the text for which you want to search.
3. Press **Enter** or select
   . The search is performed; the request list is updated as required so that only those requests that meet the search requirements appear in it.

To cancel the current secondary search:

- In the secondary-search controls, select the **x**.

Viewing the Parameters of a Request

You can view the complete request form of an existing borrowing request. Depending on its status, you may also be able to edit the request. To view the form, select **View** or **Edit** (whichever appears). The form opens in a sliding panel. For additional information, see Editing a Borrowing Request (New Layout).

Note

View appears if the request status is one of the following:

- Returned item to partner
- Request completed - The request was either delivered or canceled before it reached the hold shelf.
- Shipped digitally
- Canceled by partner
- Cancel requested

Otherwise, **Edit** appears.

Workflow Actions

You can manage existing borrowing requests by performing actions on them, changing their statuses, removing them from the task list, and managing their labels.

Performing an Action

You can perform actions on individual borrowing requests from the **More actions** menu of the request. The available options depend on the type of request and its status.

To perform an action on borrowing requests:

Select the action you want to perform on the selected requests, as described in the following table:

Resource Sharing Borrowing Request Page Links

Link	Description
Assign to	Assign a task to a user (see Managing Task Assignments below).
Cancel	Cancel the request. Appears only when: • The request is still active • The request does not have a status of **Loan** • The request has not been shipped • No partner exists or the configured active partner supports the **Cancel** feature When canceling a request, the request's status becomes **Canceled by staff**. You can also delete requests in Rapido, on the **My Account** tab. When doing so, the borrowing request's status becomes **Canceled**. If an item is on the hold shelf when canceled in Primo: • The hold request is canceled • The item moves to the expired hold shelf • The request is marked as **Completed** When a request is canceled, a message is sent to the patron. The letter is Ful Cancel Request Letter (email) or Cancel Request Letter (SMS). To configure the message, see Configuring Rapido Letters.
Check Out to Patron	Marks that the patron received a physical non-returnable item and completes the request.
Conditional Reply	When an ISO message is sent from the lender, the borrowing request changes to **Conditional** status and the **Date for Reply** field is displayed. When selecting this action, a window is displayed to select **Yes** or **No** in response to the condition specified by the lender. If the response is **Yes**, the request status changes to **Sent** and **Date for Reply** field is cleared. If the response is **No**, the status changes to **Rejected by Partner** and continues to the next partner in the rota.
Damaged	Send an email to the lender and set the status to **Damaged communicated**. Appears only: • For email or ISO partners • When the request is received by the library (and not as 'Physical non-returnable') and has not yet been returned to the partner • When **Damaged communicated** is enabled in the borrowing workflow profile. See Adding Workflow Profiles.
Duplicate	Create a new request based on the existing one. You can then modify the request as required on the Resource Sharing Borrowing Request page. For details on the displayed fields on this page, see the Request Attribute Field table in Creating a Borrowing Request. When duplicating a Resource Sharing Borrowing request, the values in the following fields are copied to the new request: • Title • ISSN, ISBN (Metadata fields) • Author • Requester • Owner • Request Status • Requested Format • Delivery Location • Request Note

Link	Description
Edit Shipping Cost	This allows the user to update the shipping cost without opening the **Details** pane or the full edit form for the borrowing request. The option is also available for completed requests.
Externally Obtained	Sends a request using the GetItNow service. See Sending a Request for a CCC GetItNow Resource.
General Message	Send a general message with a borrowing request to a lender (see Sending a General Message With a Resource Sharing Request).
Locate Resource	Manually activates the Borrowing Locate process. This action only appears if the request has an assigned partner or rota. See Borrowing Locate Process.
Lost	Send an email to the lender and set the status to **Lost communicated**. Appears only: • For email or ISO partners • When the request is received by the library (and not as 'Physical non-returnable') and has not yet been returned to the partner • When **Lost communicated** is enabled in the borrowing workflow profile. See Adding Workflow Profiles.
Purchase Request	For Fulfillment Services Operators / Managers with the appropriate privilege enabled, you can create a purchase request with the information in the borrowing request. If the borrowing request is inactive, you are taken directly to a purchase request form. If the borrowing request is active, a window is displayed to select whether to cancel the borrowing request or keep the borrowing request active alongside the purchase request. The purchase request's requester field is populated as follows: • If the resource sharing request is canceled, the field is populated with the requester from the original borrowing resource sharing request. • If the resource sharing request is inactive or kept active, the requester field is populated with the logged in user's ID.
Reactivate Request	Reactivate borrowing request appear when: 1. The Operator has the Reactivate privilege in the scope of the owner of the request. 2. If an active partner exists, it should have the Reactivated step in the Borrowing workflow. 3. Status is one of: CANCELLED, REQUEST_COMPLETED, CANCELLED_BY_PATRON ,CANCEL_REQUESTED, REJECTED, EXPORT_TO_THIRD_PARTY. Select this option to reactivate a completed peer to peer resource sharing request. A temporary item is recreated using the previous barcode with the process status set to **In resource sharing**. The library and location of the item are set to the same values as when the item was initially created. If the item is not yet on loan, a hold request is reinitiated. When reactivating, two options appear on the confirmation window: **Reactivate loan** and **Send general message**. If no loan is initiated, the request status is **Request Reactivated**. The request's original external ID is maintained.
Recalculate Rota Assignment	To attach a rota to a request based on configured rota assignment rules, select the Recalculate Rota Assignment link to attach the rota to the request according to the configured rules (see Configuring Rota Assignment Rules). This process also performs a locate process automatically if the **Automatically activate locate profile** option is selected for this resource sharing library.
Release assign	Remove the assignment of the task and leave it unassigned (see Managing Task Assignments) below.
Remove and Recalculate	Remove all partners, recalculate, and create a new rota in one action.

Link	Description
Rota Assignment	If request was already sent to a partner and you select this option, the partner is not removed from the rota and it remains the active partner. Only the rest of the rota is removed.
Recall	Recall shipped items when a local hold request is placed for that resource. The recall function is applicable to both ISO and email partners. You can configure which loans are recalled first if the requested resource has both copies that were shipped to a remote borrower and copies loaned to local patrons. The parameter that controls this choice, **rs_prefer_recall_method**, defaults to **False**. Changing it to **True** recalls the shipped item first, rather than the locally loaned copy. Recalls are supported if the borrowing workflow profile includes the **Recall item** action (see Configuring Workflow Profiles). In that case, borrowing requests display a new action, **Recall**. For more information about the recalling resource sharing requests, see the Resource Sharing Request Recalls video (7:33 min).
Receive	Select a receiving format and enter a temporary barcode to enable receiving the resource (see Resource Sharing Partners). If the **generate_resource_sharing_temp_barcode** configuration setting is set to **true**, the temporary barcode is displayed automatically. See Receiving Items.
Reject	Mark a request rejected by the lending institution as **Rejected** (see Rejecting a Borrowing Request). Reject is only visible if the workflow option **Reject** is enabled. When rejecting a lending request you must enter a reason. The reasons are transferred to the borrowing library so a common set of reasons is used. The list can be found here.
Remove	Remove the request. Appears only when the request's status is one of the following: • Returned item to partner • Request completed - The request was either delivered or canceled before it reached the hold shelf. • Shipped digitally • Canceled by partner • Cancel requested
Renew	Renew a resource sharing borrowing request. A dialog box appears, where you enter a due date for the request and an optional note in the Internal note and/or Note to partner fields. For details on these fields, see step 3 in Rejecting a Borrowing Request. The request status is changed to **Renewed by Partner.** This option appears when **Staff renewal** is selected for lending requests in the Resource Sharing Lending Workflow Profile (see Configuring Workflow Profiles). If the request is renewed, a message is sent to the patron and a renewal fee may be charged. The letter is Ful Borrowing Info Letter. To configure the message, see Configuring Rapido Letters. A resource sharing renew fee is set as part of a fulfillment policy. For more information about requesting renewal of a borrowing request, see the ISO ILL: Request Renewal video (10:06 mins).
Request Renew	Renew a resource sharing borrowing request under the following conditions: • A Resource Sharing Lending Workflow Profile exists with **Staff Renewal** enabled. • The partner is not part of a fulfillment network. • The item has arrived. • The item has not been returned.

Link	Description
	A dialog box appears, where you enter a due date for the request and an optional note which displays in the **Notes** tab page of the request. If the Resource Sharing Lending Workflow Profile has the **Renewal Response** and **Staff Renewal** options selected, the request status is changed to **Renew Requested**. For details on workflow profiles, see Configuring Workflow Profiles. If the request is renewed, a message is sent to the patron and a renewal fee may be charged. The letter is Ful Borrowing Info Letter. To configure the message, see Configuring Rapido Letters. A resource sharing renew fee is set as part of a fulfillment policy. **Note** If **Renewal Response** was not selected for the workflow profile, the request is automatically renewed after selecting the **Request renew** link; the request's status is **Renewed by partner**, and the **Renew** link does not appear. This option appears for requests with a **Received** status.
Resend Patron Email	For digital requests with document delivery, the email may be resent may be resent to the patron.
Return	Appears when the request is received by the library (and not as 'Physical non-returnable') and has not yet been returned to the partner. If the borrowing Workflow Profile for the partner includes the **Lender check in** option, the request status is changed to **Returned item to partner** (see Configuring Workflow Profiles). The Resource Sharing Return Slip Letter is printed when returning a borrowing item to the lender. For more information, see Configuring Rapido Letters. It is also possible to return items to the lender by using the **Fulfillment > Resource Requests > Scan In Items** menu and selecting **Return to lender**, and scanning in the barcode of the item that is to be sent back to the lender. For more information about the returning items to the lender, see the ISO ILL: Lender Checked-in Message video (8:35 mins).
Send	Appears only when an ARTEmail or ISO partner is configured. Opens the Resource Sharing Borrowing Parameters page, where you configure details to be sent to the partner. The parameters displayed are those selected for the partner during the partner configuration process (see Resource Sharing Requests).
Send Query to Patron	Display the query types configured on the Patron Query Types Code Table page (see Configuring Patron Query Types). The **Email Message** dialog box appears, enabling you to select the email template you want to use for the query. The dialog box also contains a **Note to Patron** field for a free text note to be included on the Query to Patron letter (QueryToPatronLetter). If there is only one template type of Query to Patron, the dialog box appears with just the **Note to Patron** field available for input. For additional information on this option, see Sending a Query to the Patron, below. For details on system behavior when selecting this option, see Configuring Patron Queries.
Status Query	Request a status update from the lending institution. This is only applicable to ISO partners. The returned borrower ISO status is recorded in a note. Each ISO status corresponds to the following Rapido request statuses: • Not supplied - Rejected by partner, Locate failed, Canceled By Patron, Expired • Pending - Created borrowing request, Request sent to partner, Ready to be sent, Locate in process, Will Supply, Pending Approval • In Process - Loaned item to patron, Returned by patron, Renew request not accepted, Renewed by partner, Renew requested, Renew Accepted, Mediated Patron Renewal, Exported to third party, Manual renew, Automatic renew, Waiting for receive digitally • Cancel Pending - Cancel request not accepted, Waiting for cancel response • Canceled - Canceled by partner, Canceled by staff

Link	Description
	• Shipped - Shipped Digitally, Shipped Physically • Received - Physically received by library, Digitally received by library, Received - not for loan • Overdue - Overdue request • Returned - Returned item to partner • Checked In - Request Completed, Lender check in, Externally Obtained • Recall - Recalled by partner • Lost - Report lost item to partner, Declared lost by partner • Unknown - Report damaged item to partner
View Local Resources	Opens a local search for resources matching the requested item. If the resource is found locally, you can add a local hold-request on the matching local resource. To do so: 1. In the search results, in the item's listing, select **More actions** (...) > **Request**. The Create Request page opens in the sliding panel. 2. Select **Submit**. The local hold-request is created.
View Network Resources	Opens a Network Zone search for resources matching the requested item. If a query cannot automatically be created (for example, the locate by field OCLC does not exist in the request), a query runs with a single condition of Tag Suppressed equals false.
Update Library System	This action appears if an action was expected to update the local library system by an NCIP message, but the message failed to b sent. The cause of the error appears as a note prefixed by `Local library reported error`. The **Update Library System** action reattempts to send the last NCIP message to library system.

Changing Request Statuses

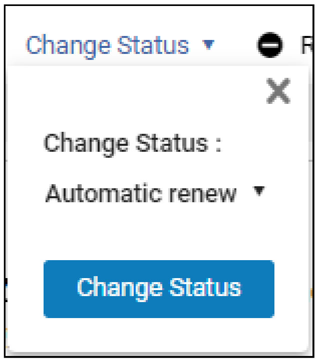
As a borrowing request is processed, its status automatically changes accordingly. You can also change its status manually, as required. Furthermore, you can change the status of multiple requests in a single action.

Note

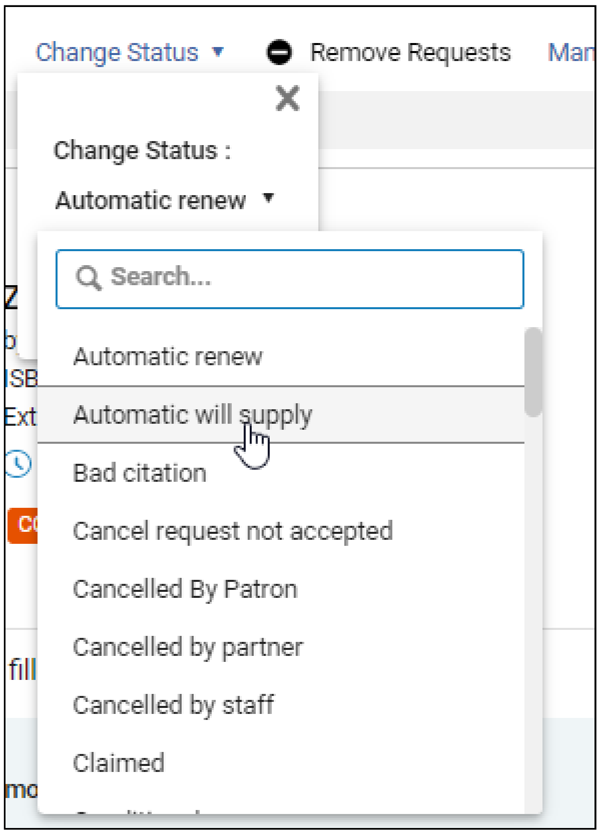
When the status of a request is changed from **Report lost item to partner** or **Report damaged item to partner** to **Completed**, the temporary item is removed and the loan is closed.

To change the status of one or more borrowing requests:

1. On the Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), select the checkboxes of the requests you want to manage. The **Actions** options become available.
2. Select **Change Status**. A **Change Status** box opens.



3. Select the dropdown list of statuses. (That is, select **Automatic renew**, the first option in this list.)



4. Select the required status. The dropdown list closes, and your selection is displayed.
5. Select **Change Status**. The statuses of the selected requests are changed.

Removing Requests

Completed borrowing requests can be removed from the task list. When they are, they can only be viewed in analytics.

Note

Requests that are not **Completed** cannot be removed.

To remove completed borrowing requests from the task list:

1. On the Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), select the checkboxes of the requests you want to remove. The **Actions** options become available.
2. Select **Remove Requests**. The requests are removed.

Managing Labels

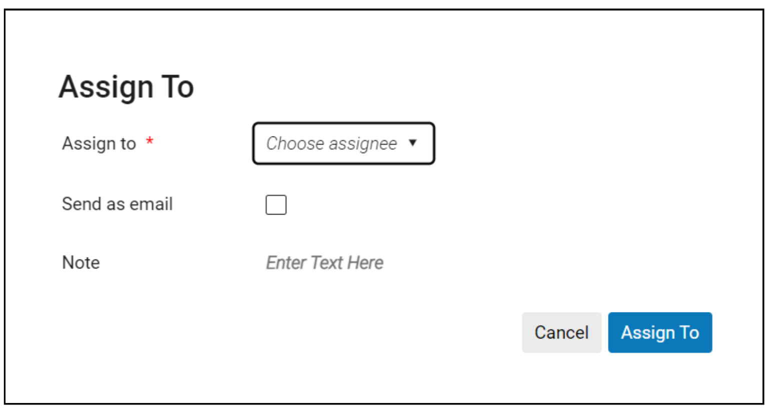
Labels can be attached to, or removed from, individual requests or multiple selected requests; see New Layout 2022.

Managing Task Assignment

A borrowing request can be assigned to a user, whether it is already assigned to a different user or is currently unassigned. A user with the Fulfillment Services Manager role can manage all request assignments. Other users may be limited to only assigning unassigned tasks or reassigning tasks that are assigned to them.

To assign or reassign a task:

1. On the Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), select **Assign** for the relevant task. The **Assign To** dialog box opens.



Assign To Dialog Box

2. From the **Assign to** drop-down list, select an operator.
   The list of operators includes only those users who have the Fulfillment Services Operator role.
3. Select the **Send as e-mail** checkbox to notify the operator of the new assignment.
4. In the **Note** field, enter notes, as needed. The field is limited to 1,000 characters.
5. Select **Assign To**. The request is assigned to the selected user.

To release the assignment of a task:

- On the Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), select **Release assign** for the relevant task. The assignment is removed, and the task becomes unassigned.

Sending a Query to the Patron

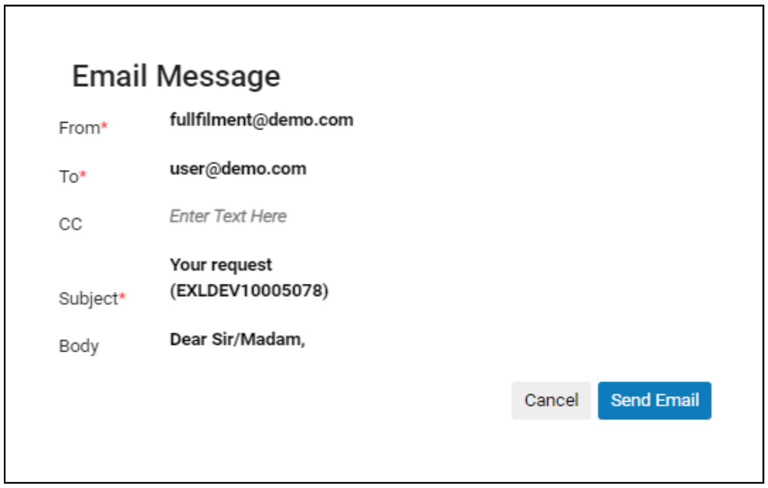
When you select **Send query to patron** from the **More actions** menu, depending on the configured patron-query template/type settings (see Configuring Patron Queries), the query is either sent automatically, or you are given the opportunity to select the appropriate temple/type and, in certain cases, to edit the body of the message before it is sent.

When the Query Template Is Preselected

If there is only one patron-query template or type available for the current context, this template/type is automatically selected. Depending on your system settings, you may or may not be able to edit the body of the message.

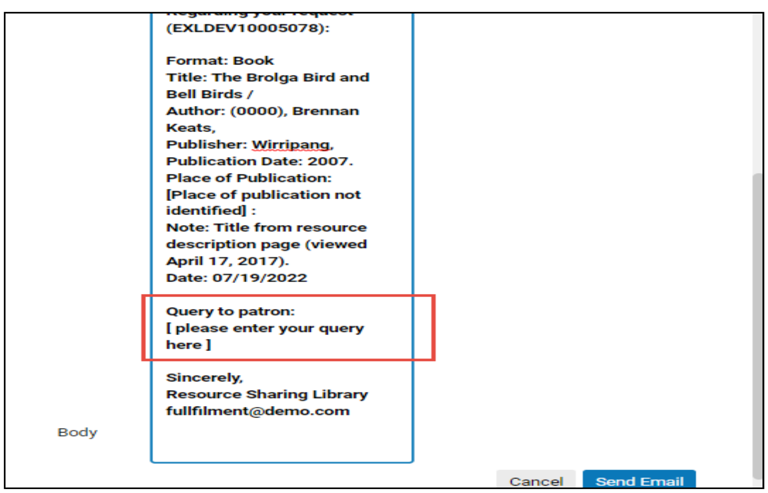
To send a patron query when only one patron-query template or type is available:

- Select **Send query to patron**. An **Email Message** dialog box appears.
    - If you are using patron-query *templates*, and **Edit if Single** is set to *true*, when you select **Send query to patron,** the **Email Message** dialog box below opens. The **Subject** field contains the External Identifier of the request (if one exists). The **Body** field contains text relating to the requested resource.



Email Message dialog box when using patron-query templates

Select any field to modify it, as needed. The **Body** field expands when you select it, as necessary. Note that the **Body** field may contain text that should be modified before the message is sent, for example *Query to patron: [please enter your query here]*.



Body field selected (and scrolled down) in the Email Message dialog box

When you have finished editing the message, select **Send Email** to send the message to the patron.

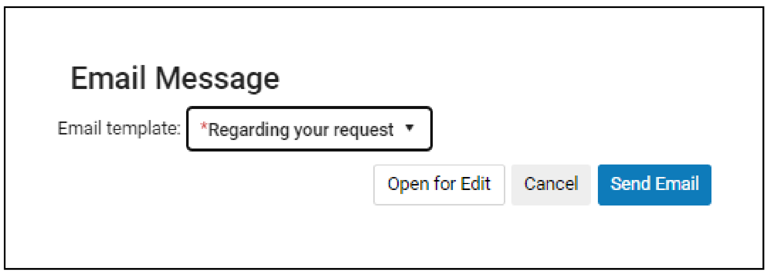
- If you are using patron-query *templates*, and **Edit if Single** is set to *false*, when you select **Send query to patron,** the query is sent immediately.
- If you are using patron-query *types*, when you select **Send query to patron,** the query is sent immediately.

When the Query Template Must Be Selected

If there are multiple patron-query templates or types for the current context, you must choose the template/type to use. Depending on your system settings, you may or may not be able to edit the body of the message.

To send a patron query when multiple patron-query templates or types are available:

1. Select **Send query to patron**. An **Email Message** dialog box appears.
2. Under **Email template**, select the template you want to use.
3. Do one of the following:
    - If your system uses patron-query *templates*, if you want to edit the contents of the message before sending it, select **Open for Edit**. The message opens for editing (see above). Edit the message as required.

    Email Message dialog box when patron-query *templates* are in use and the template has been selected

    - If your system uses patron-query *types*, if you want to add a note to the message, under **Note to patron**, select **Enter Text Here**, and then enter the note you want to add.

    Email Message dialog box when patron-query *types* are in use

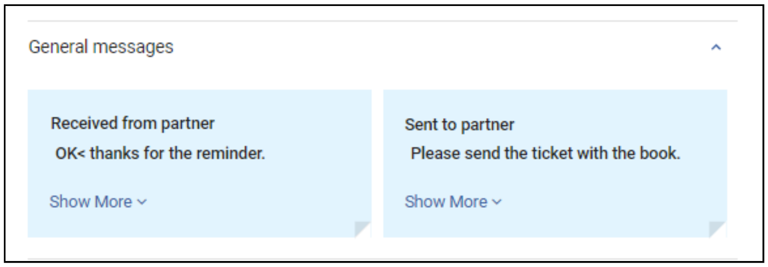
4. Select **Send Email**. The message is sent.

Sending a General Message With a Borrowing Request

You can send a general message with a borrowing request. The message appears in the request's **Details** panel in the **General messages** section, as well as in its **General Messages** tab when you select **Edit** or **View** to open the full form of the request.

Note

General messages sent by the lender are also visible in the **Details** panel and in the **General Messages** tab.



General messages to and from the lender in the Details pane

General Messages can be sent only if:

- The borrowing request is an ISO, email or NCIP-P2P request.
- The borrowing request has already been sent

Additionally, there is a **General Messages** facet, which enables you to filter requests by those containing active general messages.

For more information about sending a general message with a resource-sharing request, see the [ISO ILL: Send General Message] video (2:43 mins).

To send a general message with a borrowing request:

1. On the Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), locate an ISO, email or NCIP-P2P request.
2. From the **More actions** menu, select **General Message** . The **General Message** dialog box appears.

   General Message Dialog Box

3. In the **Message** field, enter a message
4. Select **Send**. The message is sent to the lender. The request is limited to 1,000 characters.

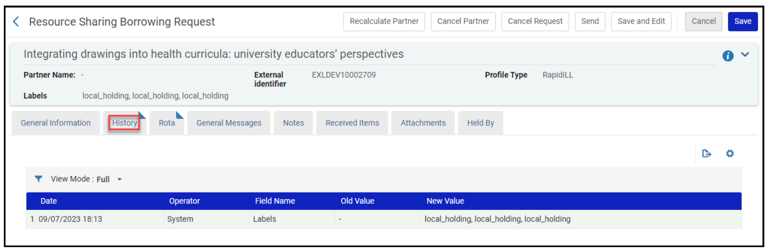
Viewing Borrowing Request Actions

The **History** tab displays the actions taken on resource-sharing borrowing requests, such as changing the request's status or adding a shipping cost. The **History** tab is available in the full borrowing-request form.

The **History** tab may be viewed in full mode or in brief mode. You can configure what type of lines are displayed in brief mode.

To view resource sharing borrowing request actions:

1. From the Borrowing Requests page, select **Edit** or **View** for a request (whichever is available). The Resource Sharing Borrowing Request page displays.
2. Select the **History** tab. The **History** tab displays the list of actions performed on the borrowing request. Select **Full** view mode to display all records for the request. Select **Brief** to display only those enabled in the configuration page Brief Audit Fields (see Configuring Brief Audit Fields).



History Tab

Rejecting a Borrowing Request

You reject borrowing requests that have been rejected by the lending institution. Requests are rejected for a variety of reasons. For example, if an item is already on loan or is not found in the library, it is rejected by the lending institution, and you can mark it as rejected at the borrowing institution. Rejection may be communicated automatically, depending on the partner type.

You can manually reject a borrowing request in the Borrowing Requests page (as explained below), or in the **Rota** tab of the full request form.

Note

A lending workflow option, *Reject*, controls whether the manual reject action appears on the **More actions** menu of the request and on the **Rota** tab. The option is enabled by default, so that the **Reject** option is available. If this workflow option is disabled, the **Reject** action does not appear. Hiding the **Reject** option may be especially useful for ISO requests, where the rejection is expected to be received as a message sent by the lender.

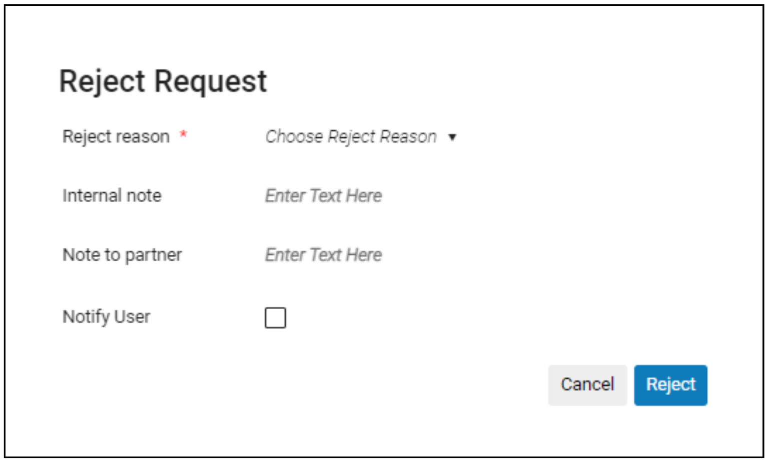
Once a request is rejected by the lender, the next partner in the rota becomes active. The request may be sent to the next partner automatically, depending on the Sending Borrowing Request Rules set up by the institution.

The **rs_keep_rejected_request_active** customer-parameter determines if a request stays in an active status, even after it is rejected by the last partner in the rota. When the parameter is set to **None**, which is the default, the request will be completed and will not be visible in the active requests queue. Rapido also sends a cancelation message to the patron.

When the parameter is set to **Borrowing** or **Both**, the request will remain in the active requests queue so the staff librarian has the option to work on the request. With this setting, Rapido does not send a cancelation message to the patron. This functionality applies only to rejections that occur after the customer parameter is changed.

To mark a request as rejected by the lending institution:

1. On the Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), in the **More actions** menu of the request, select **Reject**. The **Reject Request** dialog box opens.



Reject Request dialog box

2. In the **Reject reason** field, select a reason for the rejection.
3. Optionally, add a note in either or both of the following fields: This note appears in the following format: <Name of partner><Note text>. The fields are limited to 1,000 characters.
    - **Internal note**: A note that appears only on the borrowing side. These notes appear in the **Notes** tab but do not appear on the **History** tab, and are not sent to the peer partner. An example of such a note is: "This lender has historically been difficult to deal with."
    - **Note to partner**: A note that is sent to the partner. These notes appear in both the **Notes** tab and the **History** tab. An example of such a note is: "Thank you for your help. Please let us know when the book returns from the bindery."
4. Optionally, select **Notify user** to send a notification to the requesting patron informing them of the rejection.
5. Select **Reject**. The request's citation status changes to **Rejected the borrower request**, and the **Reject reason** and **Reject note** are displayed in the **Notes** tab of the request.

Note

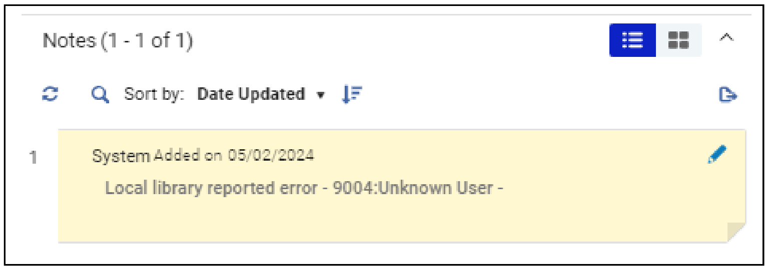
To see the **Notes**, **History**, and **Rota** tabs, in the Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), select **Edit** or **View** for the request (whichever is available). The full request form – the Resource Sharing Borrowing Request page – opens in a sliding panel.

Managing an Overdue Borrowed Resource

If Rapido receives an overdue message from the lender, it automatically marks the relevant ISO borrowing request as Overdue Request. When using ISO, overdue messages are sent by the lender, and Rapido automatically updates the borrower's request status based on this message. For non ISO requests, it is possible to manually change the status of the request to **Overdue Request**.

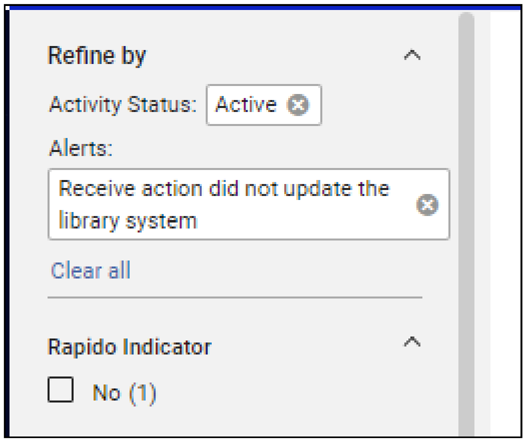
Failed ILS Updates

If Rapido fails to update the local library system using NCIP, an alert is added to the request. The text following the `Local library reported error` text is what the local library system reported as error in the NCIP response.



Error

The alert can also be used to facet for requests with this error.



Facets

For requests with this alert, you can use the **Update Library System** action to resend the message to the local library system.