
Configuring Libraries

Configuring Parameters of a Resource Sharing Library

To configure parameters for a resource sharing library, you must have one of the following roles:

- General System Administrator

Libraries within an institution or campus may be configured to have relationships where they enable patrons to check in or check out resources at another location, send items back and forth, or acquire (purchase) items on behalf of each other. If a library is configured to do this for libraries at other institutions (and not only within the institution), it is known as a *resource sharing library*.

Note

A resource sharing library must have its own Fulfillment Unit (see [Configuring Fulfillment Units](#)) in order to be able to configure the Borrowing Request Rules and the Lending Request Rules with the relevant Borrowing Resource Sharing Terms of Use and the Lending Resource Sharing Terms of Use.

To configure resource sharing library information:

1. On the Summary tab page ([Configuration Menu > Fulfillment > Library Management > Opening Hours](#)), modify the **Organization Unit Name** and **Description** fields.
 2. In the Resource Sharing Information section, select **Is Resource Sharing Library**. The Resource Sharing Information section fields appear.
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Note

Rapido can be configured to show preference for electronic format articles in the lender side locate process. If a requested article is found in electronic format then that resource is considered the only option for the lender. Other potential physical options are considered only if no electronic resources are found. This behavior is activated by the "**Prefer Uresolver locate results**" option that can be selected in the Lending Setup section of the resource sharing library.

Electronic resources are considered a match only if their coverage matches the details of the request. This affects both the automatic and the manual locate process on the lender side.

Organization Unit Details Page – Resource Sharing Information Fields

3. Enter the ISO symbol of your resource sharing library in the **ISO symbol** field to indicate that the library works with ISO.
4. To set up borrowing requests:
 1. When **Cancel request on locate failure** is selected, Rapido automatically cancels requests for which the borrowing locate process was not able to find a potential partner (see [Borrowing Locate Process](#)).
 2. Select **Automatically activate locate profile** to indicate that when a rota assignment rule is met, a locate profile is assigned to the activated rota, based on the rota assignment rule. For details on rota assignment rules, see [Configuring Rota Assignment Rules](#).

When selecting this option, the borrowing locate process is automatically triggered when a borrowing request is created from any interface – Rapido or API (see [Borrowing Locate Process](#)).

Note

The automatic locate may be activated only if the Automatic Rota Assignment Rules have also been activated to automatically attach a rota to the request. The locate process then runs on the automatically attached rota.

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3. Select **Temporary inactive for borrowing** to indicate that this library is blocked for borrowing requests.
 1. When selected, the field, **Inactive dates range**, is displayed. Select a date range to specify that the block only applies during the specified time period. If the date range is left empty, the library remains inactive

until the **Temporary inactive for borrowing** checkbox is deselected. This inactive status blocks borrowing requests for this library whether they are created via the UI, an API, or in Primo. For Primo users, the resource sharing request link will be hidden. For Rapido UI users and API processes, when requesting an item, a block message will display. The block message may be overridden in the Rapido UI.

4. In the **Default location** field, select the default temporary location to which designated inventory is moved for fulfillment of the borrowing request.
5. In the **Default pickup location** field, select the library that is to be the default pickup location for resource sharing requests. If the default pickup location is left blank, the resource sharing form has a blank pickup location field.

Note

If the default location is left blank, the Pickup Location field must be configured as mandatory in the Resource Sharing Request Form.

5. To set up lending requests see [Setting Up Lending Requests](#).
6. Select the **Locate by Fields** checkbox to filter the search in the resource sharing library. This process narrows the results available for the locate process. The page refreshes and displays the new search fields.

The page displays the search fields, as follows:

Select the fields by which you want resources to be searched for in the resource sharing library.

- Title
 - Author
 - ISBN/ISSN
 - OCLC Number
 - Edition
 - LCCN
 - Other Standard ID
 - Barcode
 - DOI
7. Select **Yes** in the **Locate only if all fields match** field if you want the locate to be successful only when **all** selected fields match. If set to **No**, then:
 - If the request has identifiers (such as ISBN, OCLC number, or LCCN), locate is successful if **any** of the selected identifier fields finds a match. Other fields such as Title and Author are not used for the match.
 - If no identifier fields exist on the request, locate is only successful if **all** of the other selected fields match.
 8. Select the **Default printer** to define the printer to use for this resource sharing library when a user performs an action that can be done while not at a desk (such as shipping). When the user is at a desk, the default printer is based on the desk.
 9. Select **Save**.

Setting Up Lending Requests

1. Select **Automatically locate resource** for Rapido to attempt to locate the requested resource locally. (For more

information on this process, see [Lending Locate Process](#).)

When selecting this checkbox, four additional checkboxes appear:

1. Select the **Reject request when locate fails** checkbox to reject a lending request when the locate did not find any matching items.
2. Select the **Reject request when no available items** checkbox to reject a lending request when there are no items that are available in place.
3. Select the **Reject request when no requestable items** checkbox to reject a lending request when there are no items that are requestable for resource sharing, according to the applicable policy.
4. Select the **Reject request when only electronic available** checkbox to automatically reject items that are only available electronically.

To customize the description and translation text of request reject reasons when received (and recorded as a request note) on the borrower side, see [Configuring Request Reject Reasons](#).

2. Select **Ignore electronic resources** for the locate process to only consider physical items.
3. Select **Automatic creation** for the partner field to be visible on the shipping items page. For details on automatic creation of lending requests from shipping items, see [Shipping Items](#).
4. Select **Temporary inactive for lending** to indicate that this library is blocked for borrowing requests.
 1. When selected, the field, **Inactive dates range**, is displayed. Select a date range to specify that the block is only applicable during the specified time period. If the date range is left empty, the library remains inactive until the **Temporary inactive for lending** checkbox is deselected. This inactive status blocks lending requests for this library.
5. In the **Default location** field, select the default temporary location to which designated inventory will be moved for fulfillment of the lending request.