The Rapido User Interface

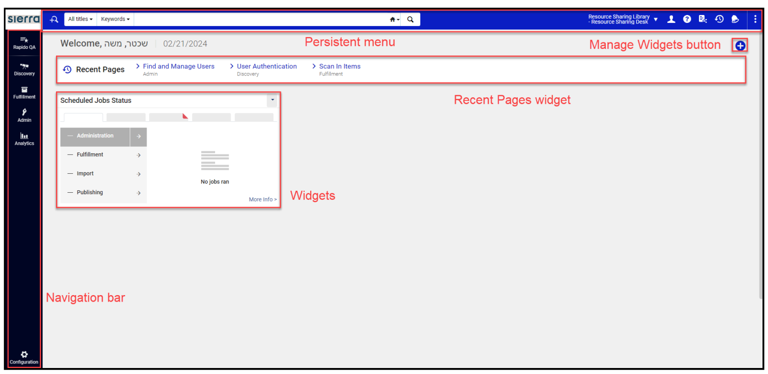
The following sections present elements that appear or remain consistent in the UI for all users throughout the Rapido UI.

Note

An administrator can configure the look and feel of Rapido, including colors, logo, and default language. See [User Interface Settings].

The Rapido Home Page

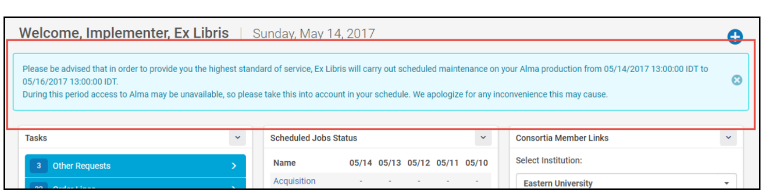
The home page is the initial page that appears when you log in to Rapido. You return to the Rapido home page when you select the logo in the persistent menu or when you cancel certain actions in Rapido.



Rapido Home Page Elements

The elements on the Rapido home page and items available in the menus depend on your user role and the information available at your institution. However, the home page always presents:

- **Persistent Menu** – For information, see [The Persistent Menu].
- **Navigation bar** - For more information, see [The Navigation Bar].
- Your user name and current date.
- **Recent Pages Widget** – Displays the pages you have most recently visited. Select to go directly to one of the pages.
- **Widgets** / **Manage Widgets Button** - Widgets are a small pane on information or actions that are relevant to your user role and Rapido's current status. Some widgets contain links that you can select to view more information. See [Managing Widgets].
- **Maintenance Message** (if there is one to display) – A message about upcoming maintenance may appear under the persistent menu. Select **X** to dismiss the message.

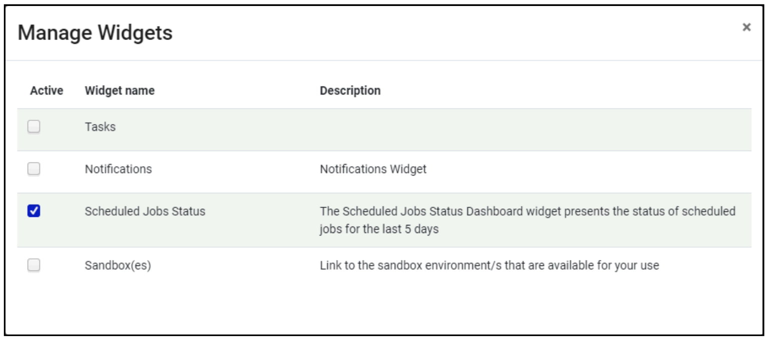


Managing Widgets

Widgets are small panes of information or actions that are relevant to your user role and Rapido's current status. Examples of widgets are a task list, a library calendar, the status of scheduled jobs. You can choose to display or remove widgets (except for the Recent Pages widget) from the Rapido home page.

To display or hide a widget on the Rapido home page:

1. Select the **Manage Widgets** button on the Rapido home page (see the figure Rapido Home Page Elements). The Manage Widgets overlay appears. For example:

   Add Widget

2. Select the empty checkbox to the left of the widget that you want to display. Select the blue selected checkbox to the left of the widget that you want to hide.
3. Select **X** when you are done.

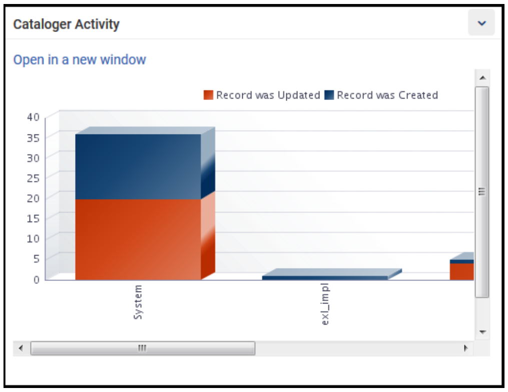
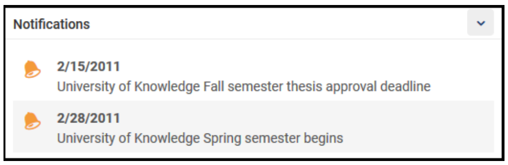
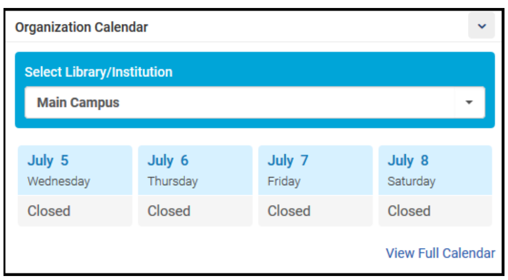
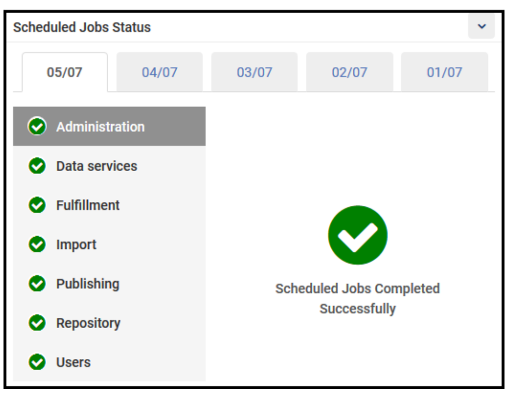
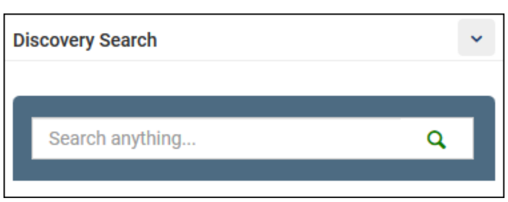
You can also hide a widget by selecting **Remove** in the drop-down menu at the top right corner of the widget.

Tasks Widget - Remove

List of Widgets

The following widgets are available in Rapido, depending on your user roles. Items in plain font are categories of widgets, rather than the actual name of a pre-defined widget.

Available Widgets

Widget	Screenshot	Roles	Description
Analytics		As defined by the widget	There may be multiple Analytics object widgets with various names, descriptions, and information. You must have at least one of the roles defined for the widget to be able to view it.
Notifications		All	Notifications to all users from your administrators.
Organizational Calendar		All	Information about institution and library hours and special events. A few days are shown in the widget; select View Full Calendar to open a pane with the full calendar.
Scheduled Jobs Status		All	The status of scheduled jobs that ran in your institution, organized by type over the last five days. If there are any failed jobs, a red **!** appears for that type on that date. Select the **More Info** link to view the Monitor Jobs page with those jobs pre-filtered to appear. See Viewing Completed Jobs. For more information about this widget, see Viewing Scheduled Job Summary Status.
Discovery Search		All	For Primo VE environments only, this widget allows staff users to search for items using Rapido's search interface, which uses the default view defined on the View Configuration page. To configure this widget, see Configuring the Discovery Search Widget.

Widget	Screenshot	Roles	Description
Administrator-created		As defined by the widget	Administrators can create widgets linked to information on any website. For more information, see Configuring Widgets.

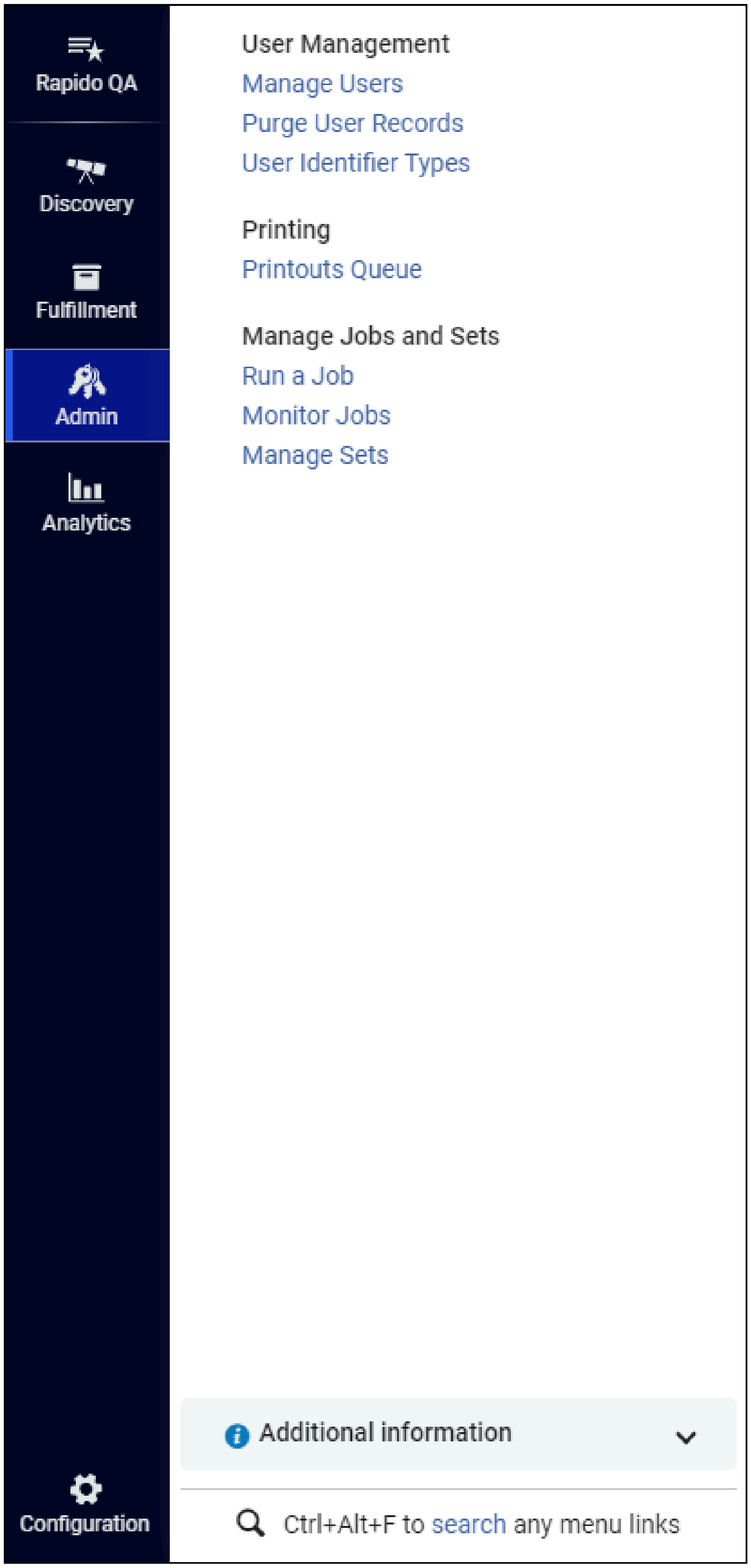
The Navigation Bar

The main menu used to navigate in Rapido. Throughout this document, any reference to this menu uses a path of menu and sub-menu elements as follows: **main section > sub-section > specific option**, for example **Fulfillment > Checkout/ Checkin > Manage Patron Services**. If the resulting page is also a menu of options, these options may appear in the documentation as additional elements to the path.

The Navigation bar can be collapsed to provide more room on the page while still remaining visible. It can be expanded again at any moment.

<table>
<tr><th>Expanded State</th><th>Collapsed State</th><th>How to</th></tr>
<tr>
<td>
</td>
<td></td>
<td>To collapse the Main Menu Navigation panel:
1. Select
on the Main Menu Navigation panel (step 4 above) to open the Quick Links panel.
2. Select the Collapse left menu option.
3. To return to the expanded view, select Expand left menu.</td>
</tr>
</table>

From the Navigation Bar you can easily search for specific menu option and set the menu options that you use frequently as Quick Links, so that the Rapido interface is personalized to your workflow and you don't have to go through the sub-menus every time.



Navigation Bar

The options in the Rapido main menu depend on several factors, in particular, the library/location to which you are logged in (see the table below) and your user role.

Select an option to navigate to the relevant page and close the menu. The main areas are described in the following areas of the documentation:

- Fulfillment — Managing patron services, resource sharing with other libraries, and other patron requests.
- Admin — Administration activities, including managing users and jobs. Also, see the Configuration Menu in Configuring Rapido.
- Analytics — Creating, running, and viewing reports about Rapido usage. Some pre-packaged reports are available from this menu.

To select a data visualization (DV) workbook to be displayed as the Rapido homepage:

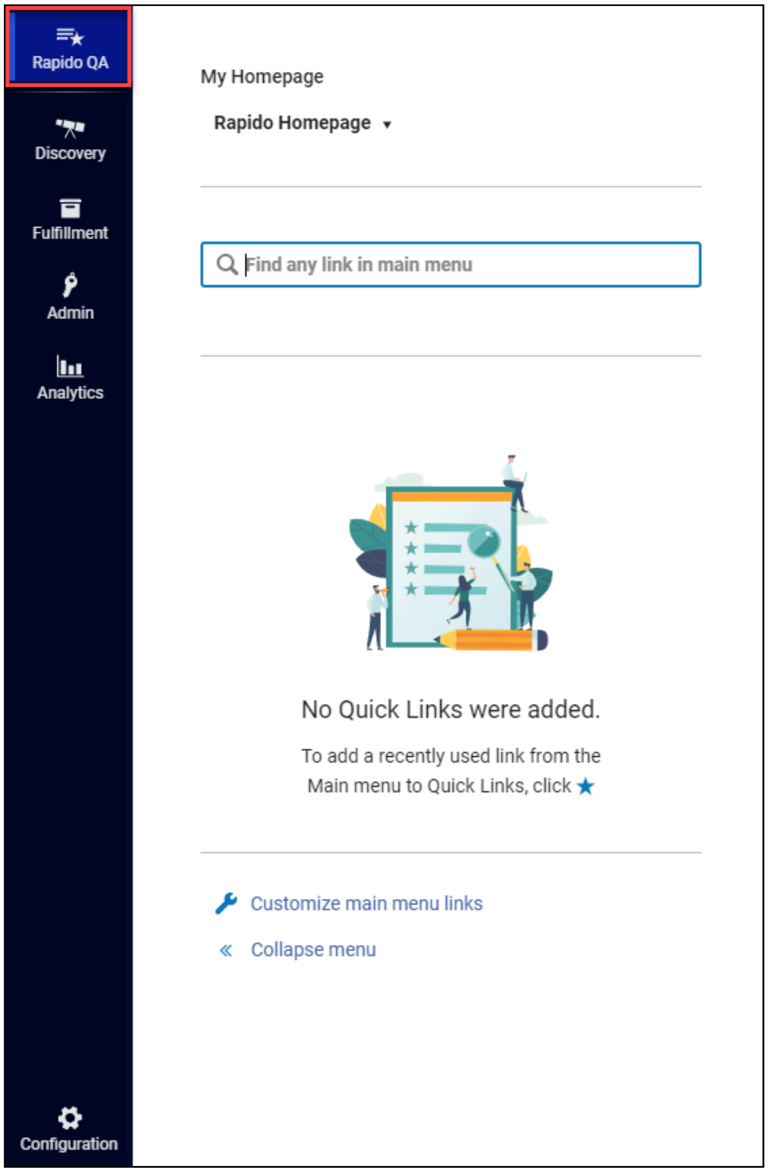
Select

on the Navigation Menu and select an option from the **My Homepage** drop-down list. The options displayed here are configured on the Analytics Object List. For more information, see Displaying a Report Preview.

To find a specific option:

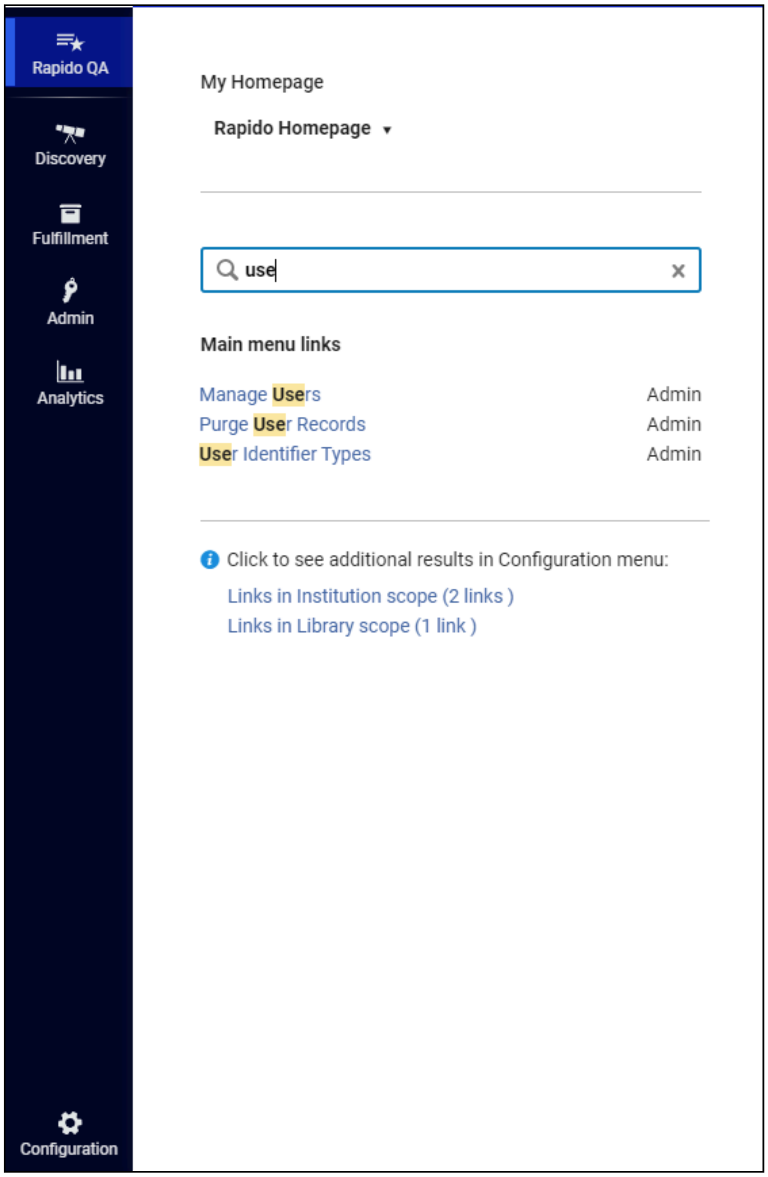
1. Select

   on the Navigation Menu or type `Alt-Ctrl-F`. Alternately, at the bottom of any menu area, select the **search** link.



Search panel

2. Enter your search term. Matching options in the Navigation Bar, as well as in the Configuration Menu, appear. Select the relevant option.



Matching search options

To create Quick Links:

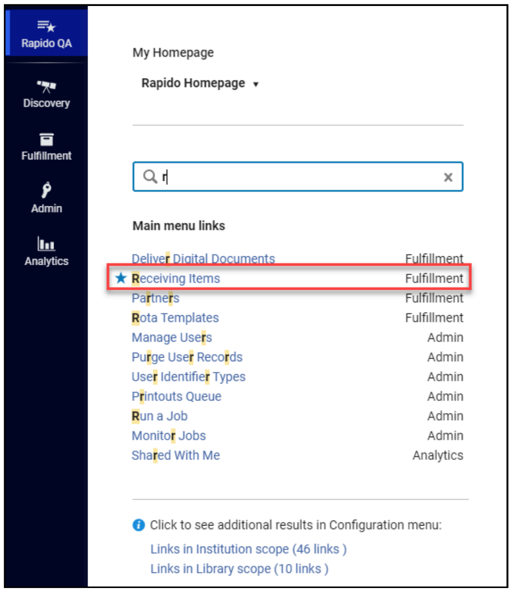
There are two methods to create Quick Links that you can use, depending on where in the Rapido menu you are:

From the Navigation Panel	From the sub-menu
1. Select on the Navigation panel. The Quick Links panel opens. 2. In the top search bar, start typing the name of the option you want to set as a Quick Link. All relevant options appear in the list below. 3. Hover your mouse pointer over the desired option, then select	1. Select the module of Rapido where the option that you want to set as a Quick Link is located. 2. Hover your mouse pointer over the desired option, then select the gray star to the left of the option; when the star turns blue, it is set as a Quick Link. 3. Select

<table>
<tr><th>From the Navigation Panel</th><th>From the sub-menu</th></tr>
<tr><td>

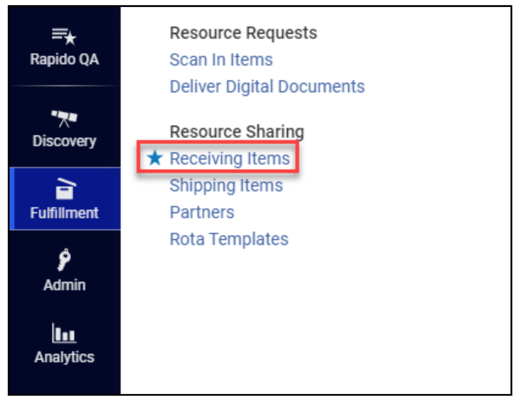
the gray star to the left of the option; when the star turns blue, it is set as a Quick Link.

4. In the bottom section of the panel, select **Pin Quick Links Menu** to display the menu, then select **X** to close the panel.



</td><td>

on the Navigation panel. In the bottom section of the panel, select **Pin Quick Links Menu** to display the menu, then Select **X** to close the panel.

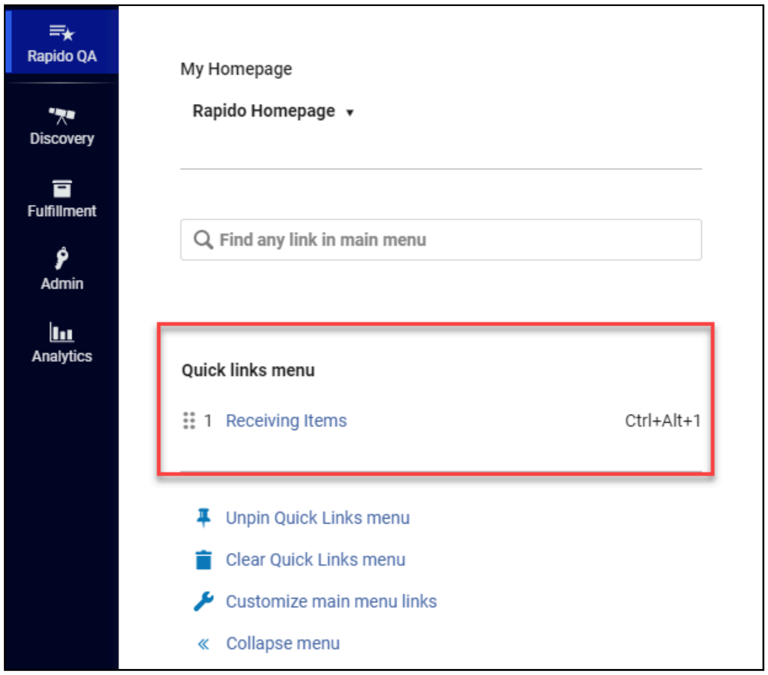


</td></tr>
</table>

Once created, you can do the following with the Quick Links:

- To view your Quick Links, select

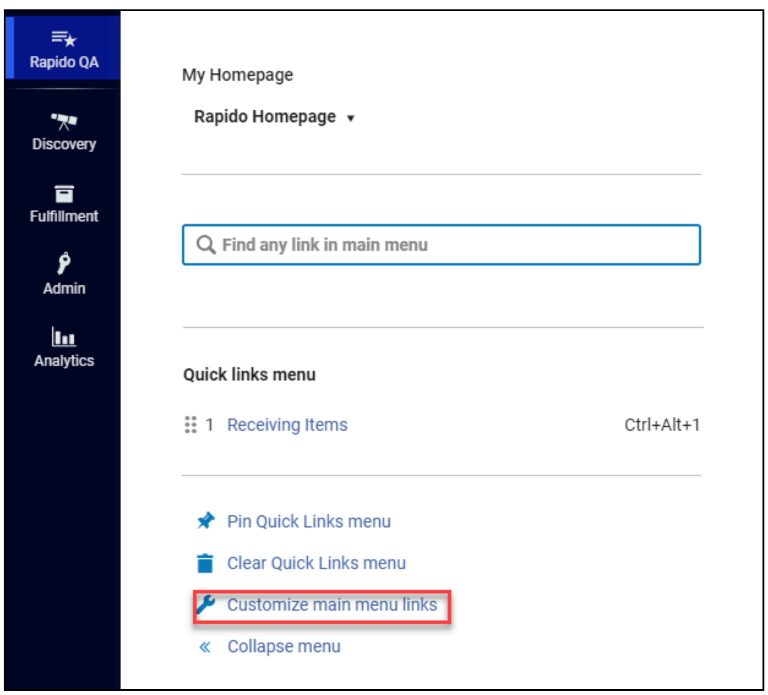
  to open the Quick Links panel, and select your link.
- Use the hotkey automatically designated to each Link to open the tools quicker.
- Select **Pin Quick Links menu** to pin all the Quick Links to you page, as additional menu below the Persistent search box, always available on all pages. To remove this menu, select **Unpin Quick Links menu**.



To customize the Navigation bar:

Do that if your screen is small and some of the links on the Navigation bar are located under the "..." button.

1. In the Navigation bar, select the top option **Rapido QA**.
2. In the panel that opens, select the **Customize main menu links** option.



3. In the Display Menu panel that opens, drag and drop the options that you do not need to the Hide Menu section below. This frees the real estate on the Navigation bar for the options that you do use. At any moment you can revert back or un-hide some of the options that you hid.

The Persistent Menu

Every page in Rapido has the same header, which is called the persistent menu.

Persistent Menu

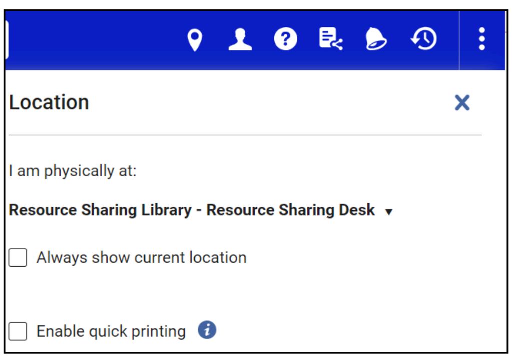
The persistent menu contains the following elements:

1. **Logo** – The logo of your consortia or institution. Select the logo on any page to return to the Rapido home page.
2. **Persistent Search Box**
3. **Main Menu Icons** – Icons include (from left to right):

<table>
<tr><th>Icon</th><th>Description</th></tr>
<tr><td></td><td>

Library/desk selector (I am physically at:) – Rapido presents you with the features and options that are relevant to your user role and your logged in desk or department. You can switch locations using this menu: select the new location in the drop-down menu.

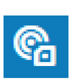
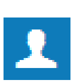
The current location does not appear in the persistent menu by default. To display the current location in the persistent menu, select **Always show current location** in the library/desk selector menu.



Library/Desk Selector Menu

Current Location in Persistent Menu

Enable Quick Printing – Select this option to set that all printouts that are created as part of a workflow via the user interface and going to a specific printer should print automatically, overriding the Print dialog. When using quick printing, the printing window immediately displays when the letter is generated.

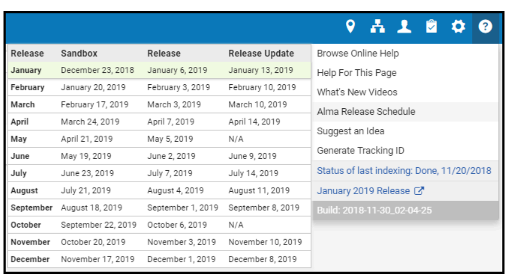
</td></tr>
<tr><td>
(not shown)</td><td>RFID connection icon (appears only when an RFID integration profile is defined).</td></tr>
<tr><td></td><td>

User Menu – Your user name and photo (when available) appears as a link. Select the link to open the user menu. The options in this menu are as follows:

- In some institutions, the first item in the menu is a language selector that you can use to change the language used in the UI. To change your language, select a new language from the drop-down list. The user interface changes to the selected language. Currencies and numbers in the UI and exported Excel files change to match the standard defined by

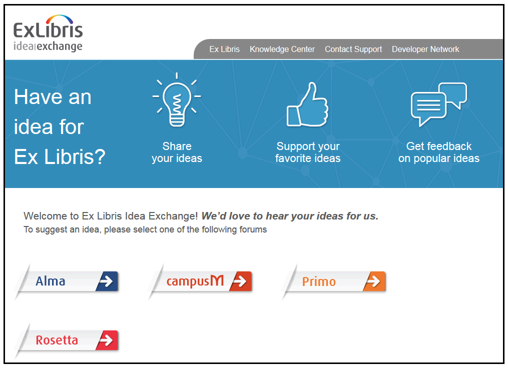
</td></tr>
</table>

<table>
<tr><th>Icon</th><th>Description</th></tr>
<tr><td></td><td>
the language (with commas, periods, and spaces in the appropriate locations). See Configuring Institution Languages.
◦ **Change Password** – Change your password. This option only appears for internally managed users (see Account Type). To change your password, enter your existing password and your new password twice and select **Save**. Your new password is saved.


Change Password Dialog Box
Note
Depending on your institution's setup, you may be required to use passwords of a certain length, to include certain characters in your password, or to change your password at certain times.
◦ **User Details** – Display details about your user on the User Details page. For more information, see Editing Users.
◦ **Detach from social account** – If your user account has been associated with a social account and you want to disassociate the two, select this option to do so. This appears only if the user account is associated with a social account.
◦ **UI preferences** (on all pages other than the home page) – This submenu enables you to select the font size of the UI and whether the pages are presented with gutters (default) or full width. Select the font size (**Display Density**) to suit you. Your selection is saved between sessions. select the **Shortcut Customizations** link to view the global Rapido keyboard shortcuts and disable some of them, if needed. See Global Rapido Hot Keys.
◦ **Feature Rollout Configuration** – Open the Feature Rollout Configuration page, in which you can choose which optional new features to activate.
◦ **Sign Out** – Log out.
</td></tr>
<tr><td></td><td>
Help link – A menu of help options. Select from:
◦ **Browse Online Help** – Open the Online Help.
◦ **Help For This Page** – Open the Online Help page that is relevant to the current UI page that you are on.
◦ **What's New Videos** – View a page with links to the most recent video tutorials.
◦ **Rapido Release Schedule** – Display a pop-up with the last several, and next several, Rapido sandbox, production release, and release update dates.


Release Dates Pop-up
The current release version and build number appear at the bottom of the Help menu. For premium sandbox customers, when working in the sandbox, the build information indicates the date that this build was cloned from production. An asterisk in the Release Update column indicates the date of the next scheduled refresh.
◦ **Suggest an Idea** – Suggest an idea to Ex Libris. Select to open the Ex Libris Idea Exchange page in a new window.
</td></tr>
</table>

Icon	Description



Ex Libris Idea Exchange

- **Generate Tracking ID** – Generate a tracking ID for your Salesforce case to assist Ex Libris in debugging a problem. Use this when an error occurs but the error message does not contain a tracking ID. You should generate the ID as soon as possible after the error.

  Please use this unique tracking ID when reporting an issue:
  E08-0604133528-TE8IH-GENERAL

  Generate Tracking ID

  Note

  The tracking ID is not enough to resolve your issue. You must still provide as many details of the problem as possible, such as the steps in the workflow that led to the error, which entities were involved (user identifier, item barcode, and so forth.), and any other information that might be relevant.

  Watch the Tracking ID Generator video

- **Generate Performance Tracking File** – Generate a performance tracking file if Rapido displays performance issues, such as long search times. Open a support issue and attach the file to the issue. The information in the file can help the support team resolve the issue. For frequently asked questions about Performance Tracking files, see here. Generate the tracking file immediately after experiencing the performance issue, before doing any other action.

  Note

  The Performance Tracking File is not enough to resolve your issue. You must still provide as many details of the problem as possible, such as the steps in the workflow that led to the error, which entities were involved (user identifier, item barcode, and so forth), and any other information that might be relevant, such as a screencast recording and more.

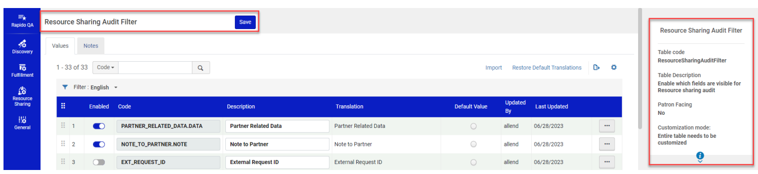
  Watch Report Issues in Alma Using a Performance Tracking File video.

- **Instance Name** - Displays the name of the environment currently in use.
- **Instance Location** - Displays the location of the data center for this instance.
- **Status of Last Indexing** - The date of the last indexing appears, which could be either the status of the last semi-annual indexing or the status of any indexing process initiated by the system or by customer support. The semi-annual reindexing is full reindexing of the Rapido repository, done twice a year (generally in July and December; for a more detailed explanation see here). While semi-annual indexing runs, it appears under Running Jobs tab (**Admin > Monitor Jobs**). If you want to run a full reindexing at other points in time, contact Ex Libris Support. If you are a Depositing Administrator, General System Administrator, or Repository Administrator, the date that appears here is a link. Select the link to view the indexing job report.
- A link to the most recent Rapido release notes.
- In your sandbox environment, the date of the last clone from production.

Icon	Description
	My Activity Center pane - allows you to view and access your recent activity, including the **Recent Entities** list that lists all the entities you have added, updated, and deleted within the last 7 days. You can scroll through the list and select an entity to resume your work, or you can view the entity in view-only mode. The **Recent Entities** list is a helpful way to find the records you have recently accessed, even if you do not remember their names. It also allows you to easily view your recent changes to your records. At any moment you can open and close the **Recent Entities** list, and then resume your ongoing work without interrupting its context.
	**Rapido Announcements** pane - enables Ex Libris to update users on important issues, unusual occurrences, or major feature rollouts, as well as provide ad-hoc updates and announcements.

Page Header and Summary Panel

A page header appears below the persistent search box.



Purchase Order Line Details Page

The page header contains:

- A back icon

  , if this page was opened from a list or as part of a larger procedure.
- The page title.
- Any relevant actions (as buttons) to perform page-level actions on the page.
  - The default action (typically **Save**) is highlighted in blue.
  - If there are too many actions to display, additional actions are available in the or **...** menu to the right of the displayed actions.

On many pages, a summary panel appears to the right of the page (if the screen size is small, it might appear below the page header). The summary panel provides information about the page's contents (for example, information about an inventory item, PO line, or user). The summary header typically includes the entity's identifying number, status, and an [info icon](). select the **Info** icon at the bottom of the panel to see who create the entity, when, and when it was last updated.

Configuring Rapido

Some configuration options are available to non-administrators, and these options are described in the documentation, where applicable. The majority of Rapido's configuration options are available on dedicated configuration pages, and are relevant only for administrators. These pages located in the Rapido Configuration menu, which you access by selecting the Configuration page link at the bottom of the Navigation bar.

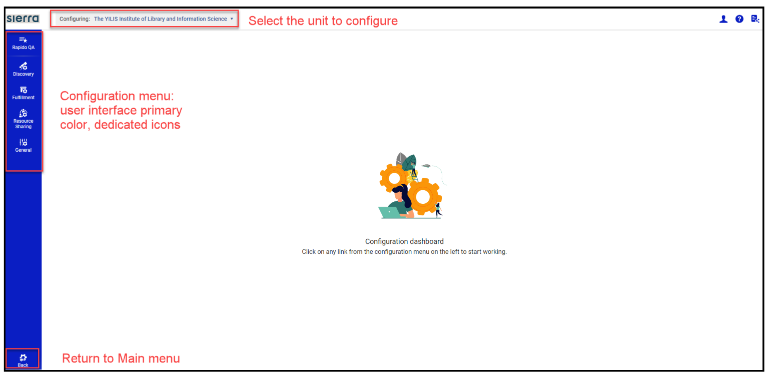
To open Rapido Configuration:

1. Select the

   icon. The following changes take place:
   - The Rapido Main Menu changes to the Rapido Configuration Menu. To distinguish it from the Rapido menu, the bar color changes to the default primary color in the user interface, and its icons feature a cog wheel to distinguish them from the regular Rapido icons.
   - The persistent search bar disappears, and the dropdown of units to configure appears instead.
   - Instead of the main Rapido window, a dedicated screen opens.
2. In the top dropdown, select the unit to configure.
3. Select the functional area to configure, such as Acquisitions, and find the specific configuration tool you need.
4. To close Rapido Configuration and to return to the task you left in Rapido, select the

   icon.



Rapido Configuration Menu

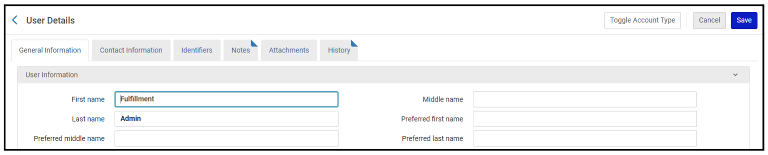
Throughout this document, any reference to the configuration menu uses a path of menu and sub-menu elements as follows: **Configuration Menu > main section > sub-section > specific option**, for example **Configuration Menu > Fulfillment > Location > Remote Storage**. If the resulting page is also a menu of options, these options may appear in the documentation as additional elements to the path.

The Rapido Configuration page includes a **Configuring** drop-down box to select the location to configure: the institution or a specific library. When you enter text in the search box, the list of configuration options is filtered to include only the options that match your entered text, with the text highlighted in the matching options.

Global Rapido Hot Keys

A long list of global keyboard shortcuts (shortcut keys) is available in Rapido. You can view the full list on the **Shortcut Customization** page (**User menu > UI preferences > Shortcut Customization**).

For any action that begins with pressing the **Alt** key, the action letter or number appears on the page when you press the **Alt** key. On a page that has tabs, enter the tab number (even if it contains multiple digits) while pressing the **Alt** key to open that tab. When you release the **Alt** key, Rapido opens the tab corresponding to the number you entered.

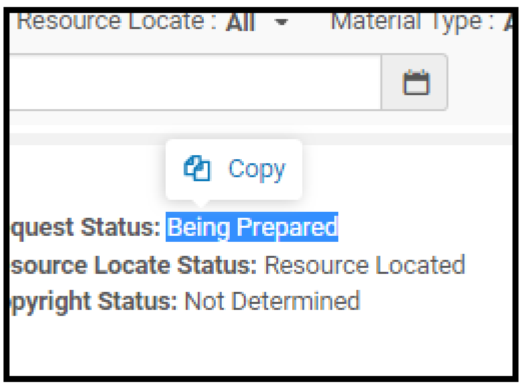


User Details with Hot Keys Highlighted

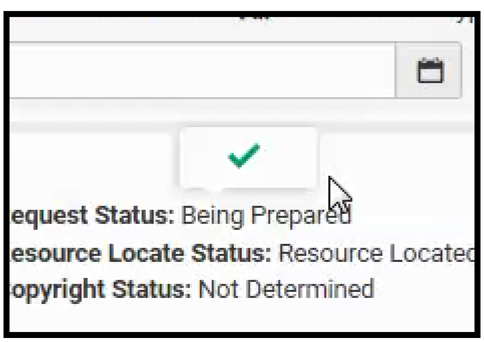
You can disable some global Rapido keyboard shortcuts. You may want to do that in cases when your language requires the usage of the same keyboard keys for typing accents or diacritics. For users who work with Rapido's Alt+Number shortcuts, we recommend using the Numbers Row in the keyboard (and not Numpad), as Numpad is used by some external programs' keyboard shortcuts. To do that, disable the slider by that shortcut. Note that you can only disable an Rapido shortcut, but cannot define a different Rapido shortcut for the same action.

Copy Option When Selecting Text

When selecting text in Rapido, a small pop-up menu with the option to copy the text appears. Select the option to copy the text; a confirmation check mark briefly appears.



Copy Option



Copied Confirmation

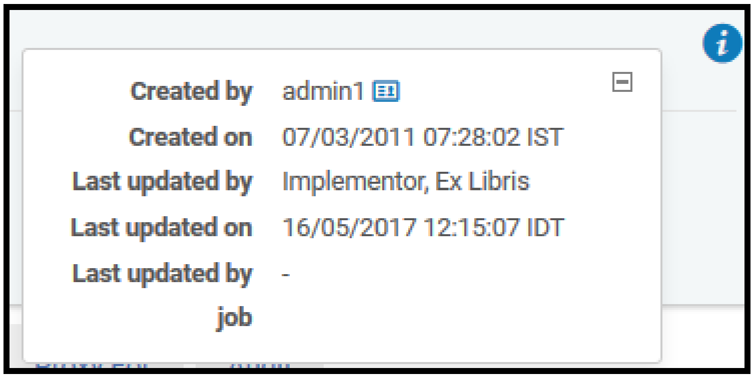
Icons

This section presents icons that appear in various places in Rapido.

Info Icon

You can see additional information about certain items by selecting the **Info**

icon on some pages in Rapido, for example the Purchase Order Lines Details page. When you select the Info icon, a pop-up appears with information about the item on the page: created by, last updated by user/job, and (where applicable) modified by information.

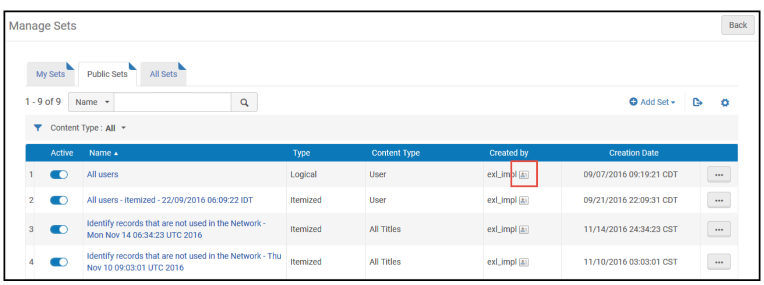


Info Icon Pop-up

User Information Icon

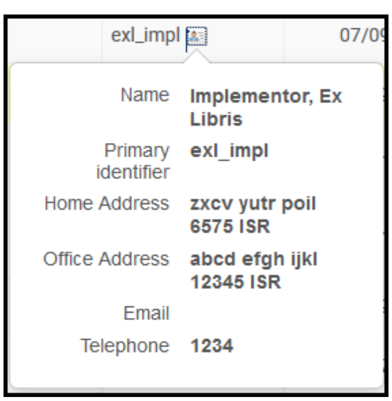
You can display user information by selecting the **User Information** icon

beside a user name on various pages and pop-up windows, such as the User Details page.

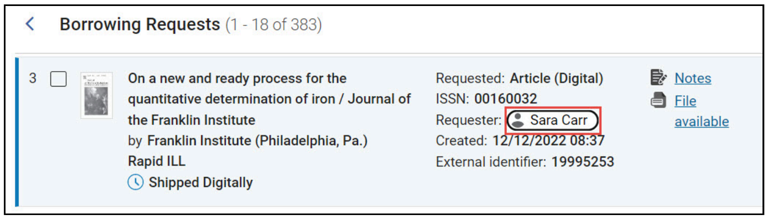


Creator Info Icon

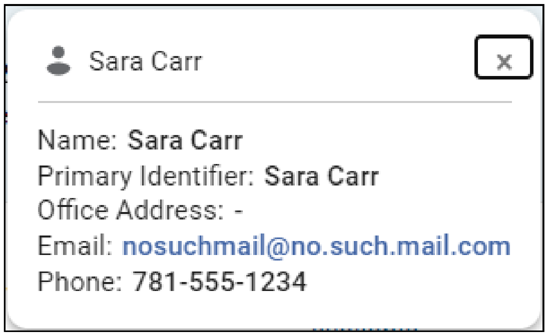
Select the icon to display user information:



User Information



User Button in New-Layout Task Lists



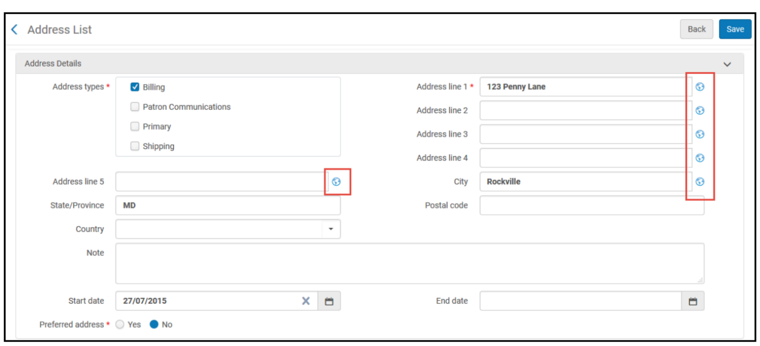
User-Information Pop-Up in New-Layout Task Lists

Translate Information Icon

If your institution supports multiple languages, Rapido translates system-defined UI elements, such as messages and field names into the language selected by the user. You may also want to enable the user to view certain entered information in the user's selected language.

A limited number of fields in Rapido support this ability. When multiple languages are enabled, these fields appear with a **Translate Information** icon

. For example:



Address List

Select the icon to open a dialog box that enables you to enter the field's information in the other enabled languages.

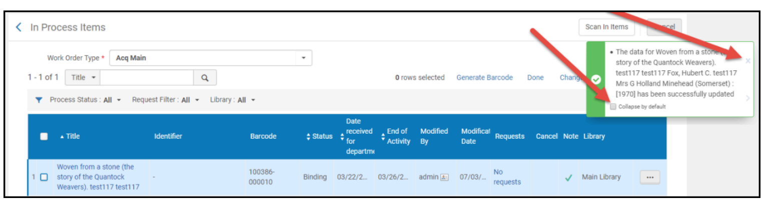
Translate Dialog Box

Messages

Rapido returns messages on many pages based on your actions or missing or required information. Messages appear in a notification bar on the side of the page. The notification bar displays message types of Information, Error, and Success, each with different icons and colors. In confirmation dialog boxes and other smaller panes, the messages appear on the page (not floating). If you ignore a message but continue to work on the page, the message is minimized to its icon and remains on the page.

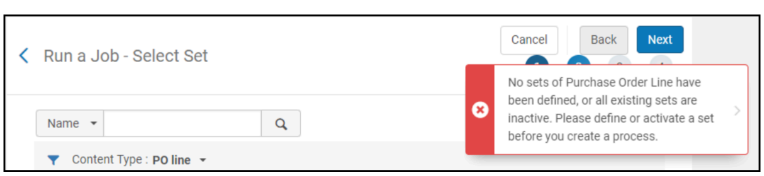
- Success – An action you performed succeeded. In the case of an action that initiates a job, success only means that the job was submitted successfully, not that the results of the job were successful. After successfully submitting a job, you can select the job number in the message to open the Manage Jobs page (see Viewing Running Jobs).

  Select **X** to remove the message or **>** to minimize the message. When enabled by Ex Libris, you can select **Collapse by default** to make all success messages on this page appear initially collapsed.

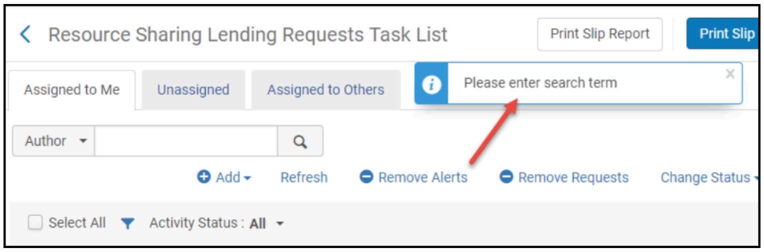
  Success Message

- Error – Your action could not be performed, or it failed. The message indicates the reason for failure, when available (see also **Generate Tracking ID** in The Persistent Menu). Select **>** to minimize the message.

  Error Message

- Information – An indication of a normal event about which you should take notice. Select **X** to remove the message.



Information Message

Tabs

Many pages contain too much information to fit on one page, or information that is better grouped together on subpages. These pages contain tabs at the top of the information. On some pages, the name of the page and some information at the top of the page (above the tabs) remains as you navigate between tabs. On other pages, navigating to a new tab may change the page name and remove or replace the top information.

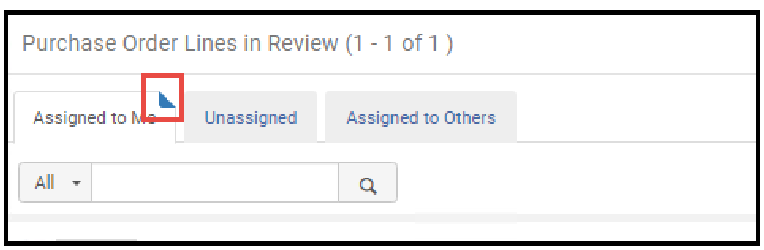
In addition, many pages contains tabs with similar functionality. For more information, see Common Rapido Tabs.

"Has Content" Indication

When a page contains multiple tabs, a blue icon

indicates that the tab has a table or list with user-configured or system-generated content.

For example:



Example of Has Indicator Indication

Note

Although a tab may contain information in its form section, the “Has Content” indication appears only when a table or list on the tab contains contents.

Common Rapido Tabs

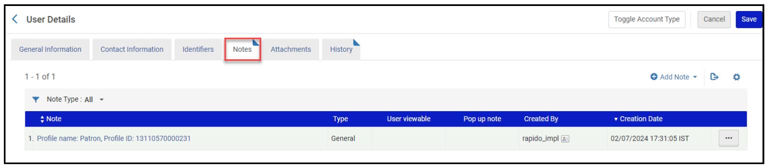
Many pages in Rapido contain tabs with similar functionality.

Notes Tab

The **Notes** tab enables you to view, add, or remove notes that are relevant to the page.

Managing Notes in the Notes Tab

To add a note, select **Add Note**. To edit a note, select **Edit** from the row actions menu.



Notes Tab

Edit Note

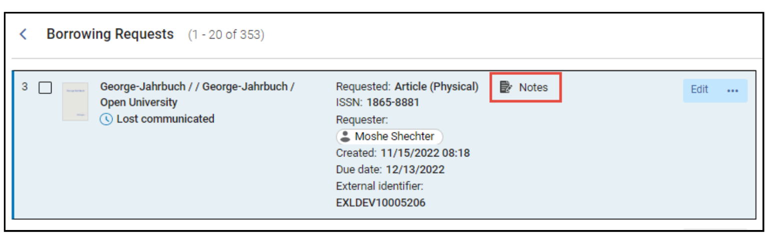
Note

The "Has Content" Indication appears on this tab only after a note is added manually by a librarian.

To delete a note, select **Delete** from the row actions menu, and then select **Confirm** in the confirmation dialog box.

Active and Inactive Notes

In Resource Sharing task lists (Borrowing Requests and Lending Requests), the notes can either be active or inactive. Active notes are notes that require processing, while inactive notes add information to a request, but do not call for any action to be performed. These are settings that are applied to all of the notes attached to a task. That is, the notes are either active or not, as a group. When the notes attached to a task are active, a **Notes** link appears in the task's row in the task list. select the link to open the **Notes** section of the task in the **Details** pane. When the notes are not active, no **Notes** link appears in the task's row, but you can still see and manage any notes that are attached to the task in the **Notes** section of the **Details** pane.



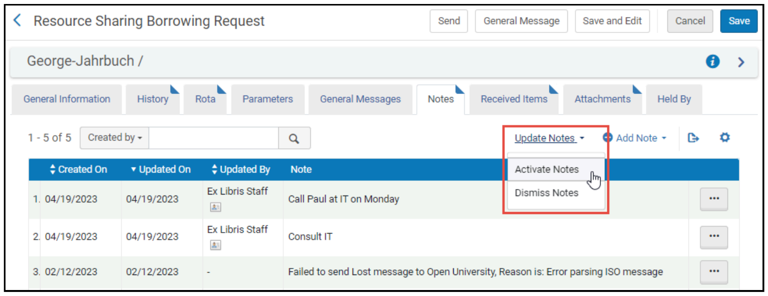
Notes Link in Task Row

By default, the notes attached to a task are inactive. Adding or deleting notes does not affect this setting. When at least one note is attached to a Resource Sharing task, an **Update Notes** menu is added to the Notes tab of the task.

To activate or deactivate the notes attached to a task:

1. In the task list, in the task's row - or in the **Details** pane when the task is selected - select **Edit**. The full form of the task opens in a sliding panel.
2. In the **Notes** tab, in the **Update Notes** menu, select one of the following:

- **Activate Notes** to activate the notes
- **Dismiss Notes** to deactivate the notes



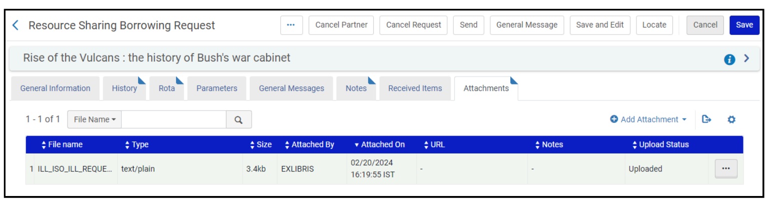
A confirmation message appears.

3. Close the sliding panel.
4. Select

to refresh the task list. The **Notes** link is added to or removed from the task's row, depending on the option you chose.

Attachments Tab

The **Attachments** tab enables you to view, attach, and remove attachments relevant to the page.



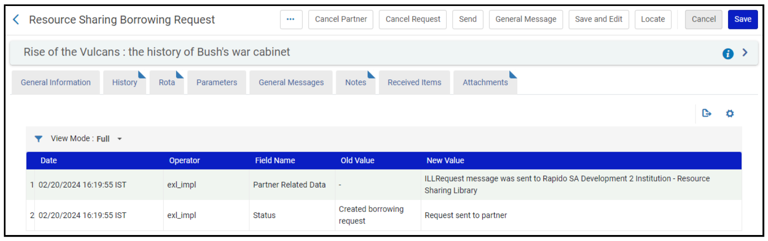
Attachments Tab

- To add an attachment, select **Add Attachment**. Browse for a file, add a URL and/or note, if required, and select **Add Attachment**.
- To edit an attachment, select **Edit** in the row actions menu.
- To delete an attachment, select **Delete** in the row actions menu and select **Confirm** in the confirmation dialog box.
- To download a file, select **Download** in the row actions menu, browse to the download folder, and select **OK**.

The maximum attachment size is 25 MB. Emails sent to a user or regarding a PO line page appear in this tab.

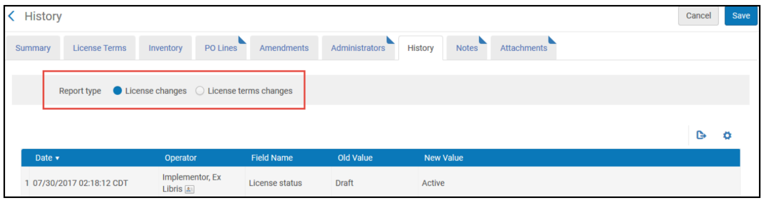
History Tab

The **History** tab displays the history of changes to the fields of the record (PO line, item record, etc.) displayed on the page. Whenever the existing value of a field is modified or removed, the change appears in the history. Values entered into fields when the record is in the process of being created, before it is saved, are not listed in the history. Once a record is created, adding a value to a previously blank field is considered a change and appears in the history. Notes and attachments that are added to a record are not listed in the history.



History Tab

In some instances, the **History** tab contains radio buttons that allow you to change the types of changes appearing in the list. For example:



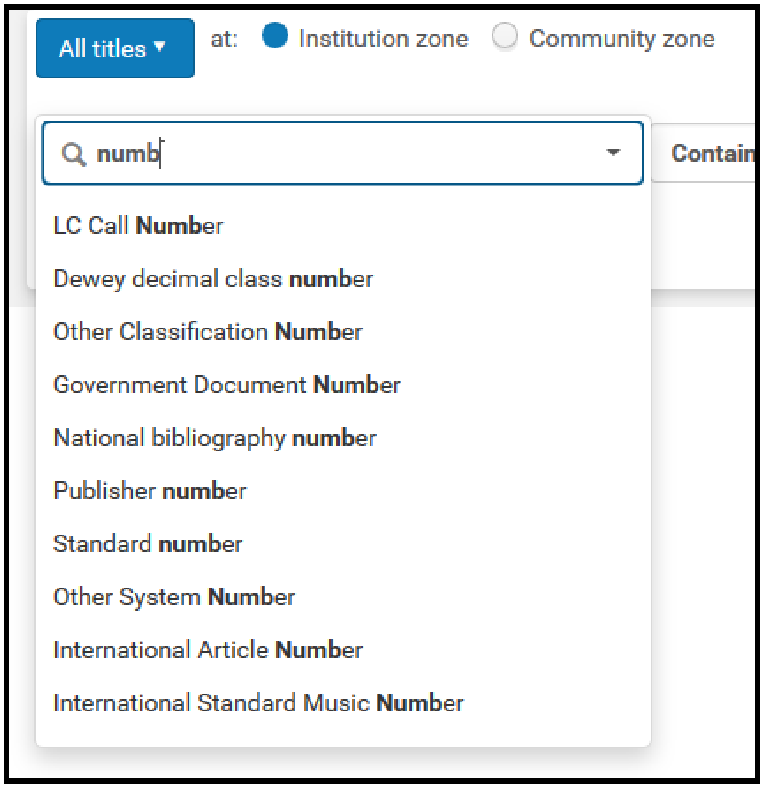
History Tab with Radio Buttons

Note

- The **History** tab of the Monitoring Jobs page has a different functionality. For more information, see Viewing Running Jobs.

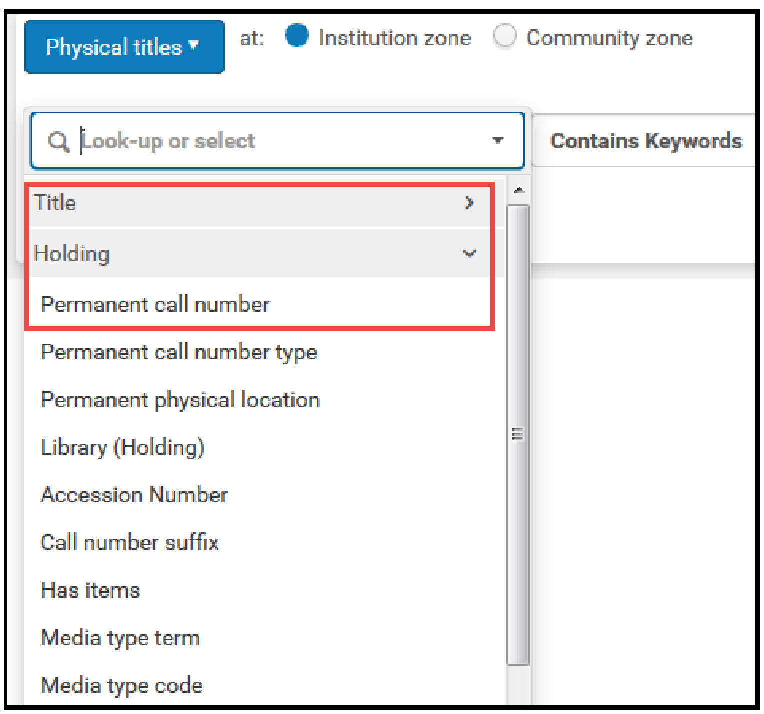
Drop-Down and Quick Pick Lists

In the various drop-down lists, you can enter part of the field name and then select it from the list of matching terms that appears.



Terms Matching Entered Text

For some drop-down lists, terms are grouped into expandable/collapsible sub-menus.

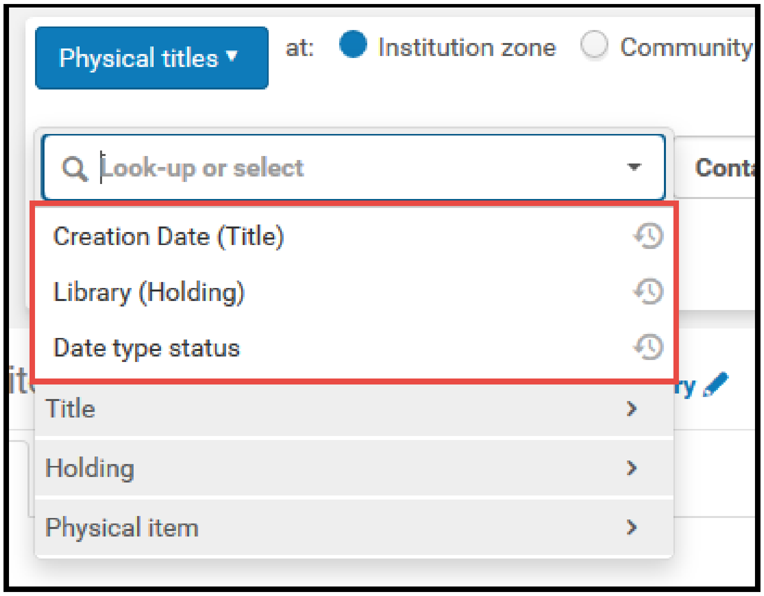


Terms in Multi-Level Drop-Down List

Recent terms that you selected appear at the top of the list.

Note

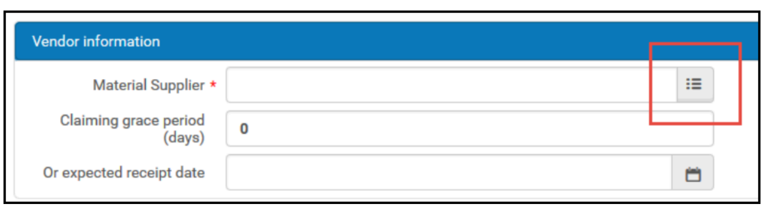
Recent terms are not limited to time. It always shows the last five entities used.



Recently Searched Terms at Top of List

Quick pick lists also enable you to select an item from a list, but provide more information and context for the selection. A quick pick list can be identified by the icon

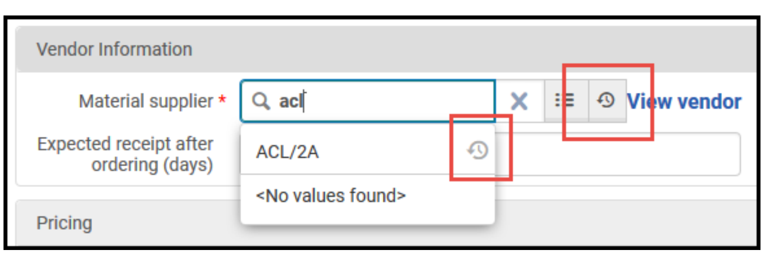
in the field.



Quick Pick Field

When selecting an item from a quick pick list (vendors, funds, users, and so forth), the list appears in an overlay pane, rather than on a new page. Select an item by selecting the item's row. If you have previously selected items of this type, select the **Recent** icon

in the selection field to select any recently selected item.



Recent Selection in Quick Pick List

Recently selected items may be disabled on certain pages due to privacy concerns.

Lists and Tables in Rapido

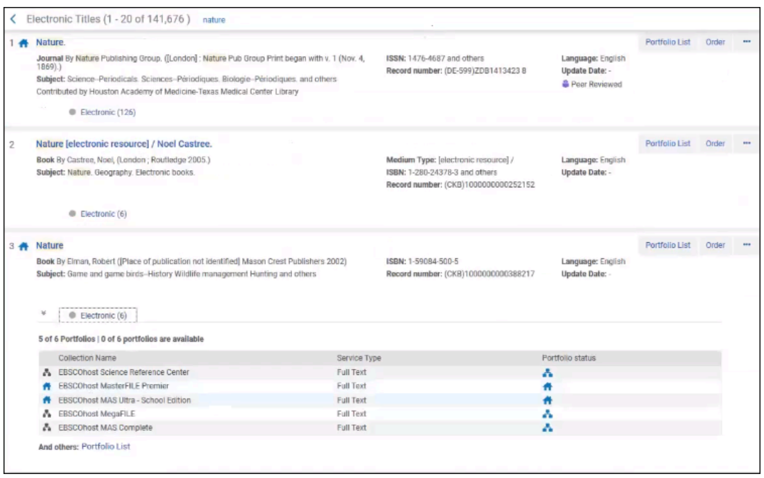
This section presents information to help you work with the lists and tables that appear various locations in Rapido.

Common Table/List Types

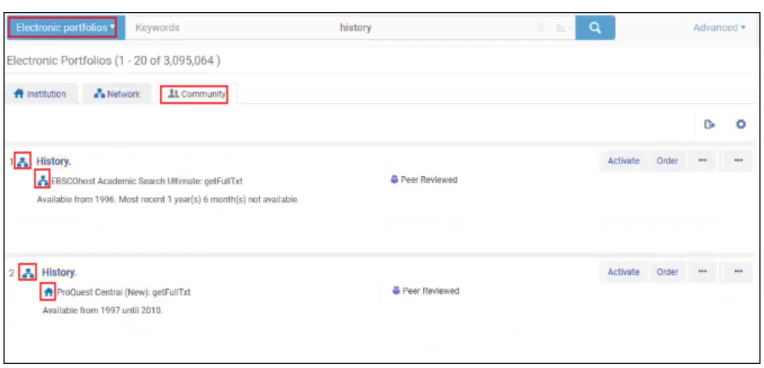
The sections below show common types of lists and tables in Rapido.

Record Lists

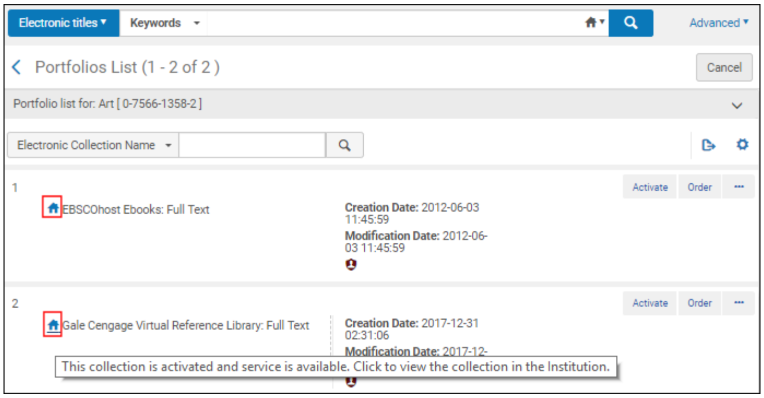
Pages with record lists display one or more Rapido records vertically down the page, such as borrowing requests (see Managing Resource Sharing Borrowing Requests).



Electronic Titles Search Results in the Community Tab (with an example showing activation/availability icons for electronic collections/ portfolios)



Electronic Portfolios Search Results in the Community Tab (with examples showing activation/availability icons for electronic collections/portfolios)



Portfolios List (with examples showing activation/availability icons)

Lists appear with:

- A *table actions list*, if any. See List, Table, and Row Actions.
  - The second to last link

    is an option to export the displayed elements in the table to Excel (see Export to Excel).
  - The last link

    enables you to customize how the results appear in the list; see below.
- Pagination options, when required (see Pagination)
- Facets for filtering the items on the list (see Facets, Filters, and Secondary Search)

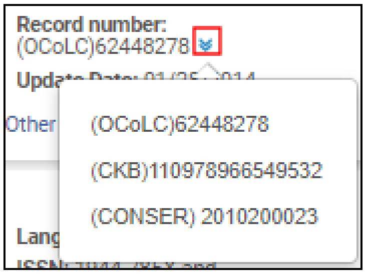
Each item in the list appears with:

- Its number in the list
- A checkbox, if there is a page-level action that can be performed on multiple items in the list
- The item's name, typically linked to a page where you can view more information about the item
- Various other information fields about the item
- A *row actions list* that enables you to perform actions on the item. See List, Table, and Row Actions
- If you are returning to this page after having viewed or edited an item in the list, that item is highlighted (see Last Item Edited Indicator).
- On some pages, additional information appears in tabs at the bottom of each list item. For example:
  - Inventory in search results may appear. Select one of the tabs to expand or collapse this information. If an **Expand** table action is present, you can use it to pre-select that all tabs, or all tabs of a certain type, are expanded by default.

Record List Fields with Multiple Values

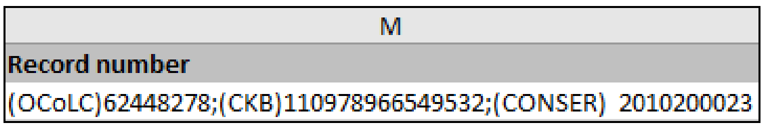
Some fields in repository search results may have multiple values. For example, in the **All titles**, **Physical titles**, **Electronic titles**, and **Digital titles** repository search results, multiple values can appear for the **Record number** field when there are multiple 035 $a entries in the cataloging record. When a field has multiple values, the search results appear with the multiple values icon (

). Select the multiple values icon to display all the values for the field.



Record Number with Multiple 035 $a Entries

The values that appear can be copied for copy/paste actions and can be exported using the **Export list** icon. When multiple values are exported to Excel, they are concatenated and delimited by a semi-colon.



M
Record number
(OCoLC)62448278;(CKB)110978966549532;(CONSER) 2010200023

Record Number with Multiple 035 $a Entries Exported to Excel

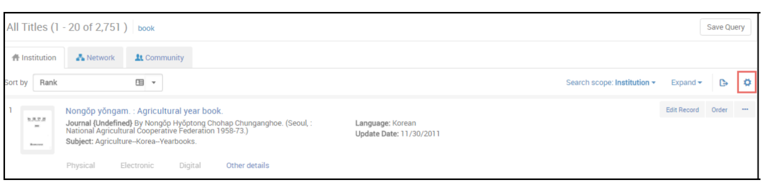
Record List from Single Record Search

When viewing a record list as a result of searching for a single record to select, you can select the record by selecting anywhere in the record row.

Configure Record List Appearance

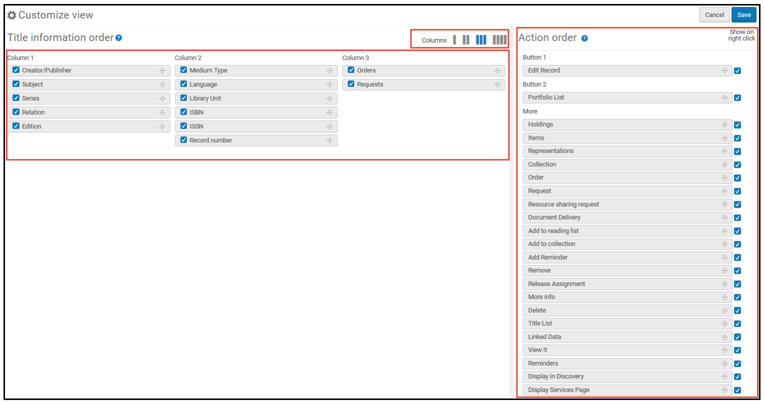
You can configure the fields, columns, and actions that appear on record lists. Select the **Manage Column Display** icon

in the table actions list to open a configuration pane.



Record List

The pane may not appear fully expanded. Select **Show all** to expand the pane.



Repository Search - Configuration Pane Expanded

Customize view

You can configure the fields that appear for each item in the record list. Select a column layout to change the number of columns. Drag and drop fields between columns. Hide a field by clearing the field's checkbox.

Action order

You can drag and drop actions to configure which ones appear as the two action buttons. You can also clear an action so that it does not appear when you right-select the repository item (note that the action continues to appear when you select the **...** menu).

Note

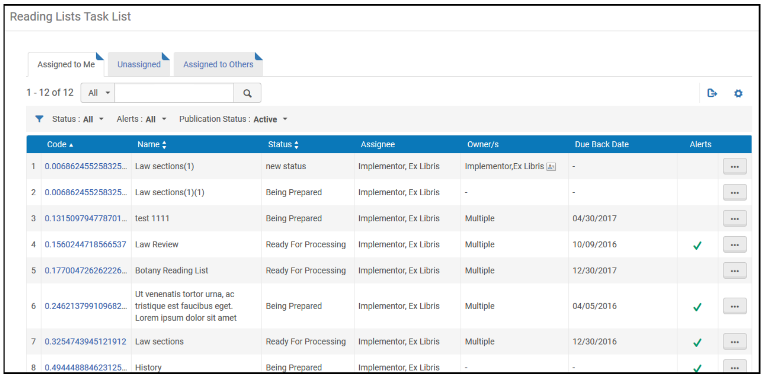
- For an entry in the list, if the entry does not contain a value for a field, the field does not appear.
- Currently, when configuring the available row actions on a page, the list of row actions displays *all actions that can be performed on the kinds of entries that populate the list*, even if these actions do not appear on the page (this is most noticeable on pages where the entries are PO lines). Regardless of the row actions that you select to appear while configuring, if the action is not relevant for the page or the entry, it does not appear in the row actions.

After you customize the columns on this page, the **Manage Column Display** icon displays a small green dot in the lower right corner

. When you select the icon again, the **Restore list defaults** option appears. Select to restore the fields and actions to their out-of-the-box settings.

List Tables

List tables display one or more elements vertically down the page in a table format. for example, the Reading Lists Task List page. They are often used to present tasks to the user: the list of resources, tasks, orders, or users that require operator attention.



Reading Lists Task List Page

List tables appear with:

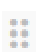
- A *table actions list*, if any. See List, Table, and Row Actions.
  - The second to last link

    is an option to export the displayed elements in the table to Excel (see Export to Excel).
  - The last link

    enables you to customize the columns that appear. Select or deselect columns to appear in the table, and then select **Done**. For more information, see Working with Table Columns.
- In some cases, you may have options to sort the list. You may be able to move an item down or up the list by selecting the up or down arrows in the **Move Up** and **Move Down** columns. Or you may be able to drag and drop items by selecting and dragging the drag and drop icon

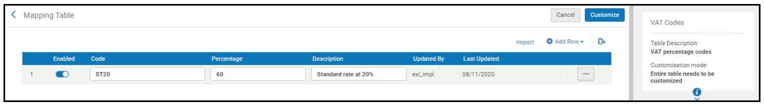
  . The selected row is highlighted, and, as you drag the row up and down the table, a blank bar appears below or above other rows, indicating to where the selected item is dropped.
- Pagination options, when required (see Pagination)
- Facets for filtering the items on the list (see Facets, Filters, and Secondary Search)

Each item in the list table appears with:

- Its number in the list
- Various information fields about the item
- A *row actions list* that enables you to perform actions on the item. See List, Table, and Row Actions.
- If you are returning to this page after having viewed or edited an item in the list, that item is highlighted (see Last Item Edited Indicator).

Code Tables

Code tables are typically available only to administrators. They display a list of options that may be available as a drop-down list in some other area of Rapido.



Shipping Method Code Table

Code tables appear with:

- The page title **Code Table**
- A summary header with basic information about the table
- A *table actions list*, if any. See List, Table, and Row Actions.
  - The first option enables you to import information to the table (see Importing Code Table Information).
  - Another option enables translation for multi-language institutions (see Code Table Label Translation).
  - **Add Row** enables you to add a new row, when available (see Adding Lines to Tables).
  - The last link

    is an option to export the displayed elements in the table to Excel (see Export to Excel).
- The option to **Cancel** your changes or **Save** / **Customize** to save your changes.

Each item in the list appears with:

- Its number in the list
- The option to enable/disable the element by toggling a slider; a blue slider

  indicates that the element is enabled; a gray slider

  indicates that the element is disabled. These sliders are not functional on all code tables. If the slider colors are muted (

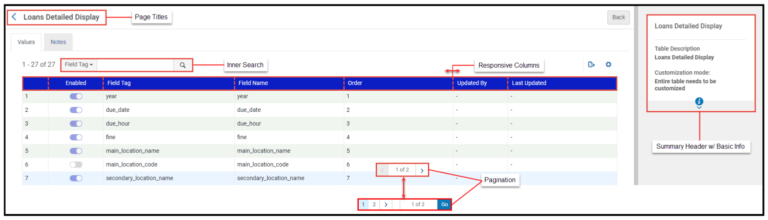
  

  /

  ), you must first enable the line using the **Customize** row action before you can change their values.
- The options to move an item down or up the list by selecting the up or down arrows in the **Move Up** and **Move Down** columns
- The code and description of the item. These can often be changed, either directly or after selecting **Customize** in the item's row actions list. Select **Save** after making any changes to the table.
- The option to select one of the items as the default value. Only one value can be selected. For some tables, this value may be disabled or may have no relevance.
- The user who last changed the element and the date of the last change
- A *row actions list*, typically containing at least the option **Customize** if you have not yet customized the list, or **Restore** if you have. Select **Restore** resets the row to its original value. After selecting a row action, select **Save** at the top of the page to save your changes. When available, select **Delete** to remove the row.

Mapping Tables

Mapping tables are typically available only to administrators. They display configurable elements that control other areas of Rapido.



Loans Detailed Display Mapping Table

Mapping tables appear with:

- **Page Titles**: Page titles are incorporated as headers for mapping tables, providing clearer context and easier identification of mapping table content.
- A summary header with basic information about the table.
- **Inner Search**: An inner search functionality enables searches within the mapping table context to quickly locate specific entries.
- **Responsive Columns**: Users can expand/reduce the width of the columns and change the columns' order (using drag and drop).
- **Responsive Columns with Text**: Mapping table columns display text instead of fields.
- **Pagination**: The pagination feature enables users to effectively manage large mapping tables. Users can navigate through mapping table entries using page numbers.
- A *table actions list*, if any. See List, Table, and Row Actions.
    - **Add Row** enables you to add a new row, when available (see Adding Lines to Tables).
    - The last link

      is an option to export the displayed elements in the table to Excel (see Export to Excel).
- The option to **Cancel** your changes or **Save** to save your changes

Each item in the list appears with:

- Its number in the list
- The option to enable/disable the element by toggling a slider; a blue slider

  indicates that the element is enabled; a gray slider

  indicates that the element is disabled. These sliders are not functional on all mapping tables. If the slider colors are muted (

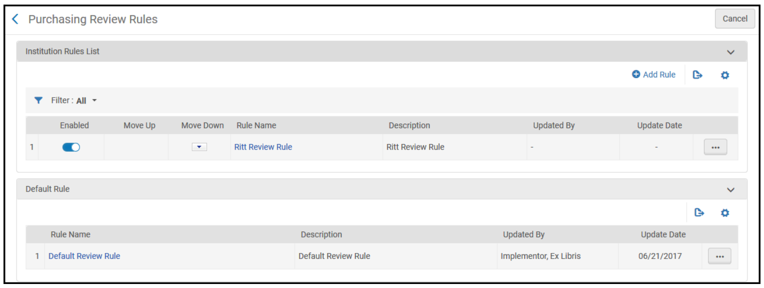
  /

), you must first enable the line using the **Customize** row action before you can change their values.

- The key (code) and other information for the item. These values, other than the key, can often be changed, either directly or after selecting **Customize** in the item's row actions list. Select **Save** after making any changes to the table.
- The user who last changed the element and the date of the last change
- A *row actions list*, typically containing at least the option **Customize** if you have not yet customized the list, or **Restore** if you have. Select **Restore** resets the row to its original value. After selecting a row action, select **Save** at the top of the page to save your changes. When available, select **Delete** to remove the row.

Rules Tables

Rules tables are typically available only to administrators. They contain a series of checks that Rapido performs automatically during the course of some process.



Purchasing Review Rules

- Each rule has one or more criteria for Rapido to check to see if the rule applies to the current object being evaluated.
- When the relevant process occurs in Rapido, for example, a request, Rapido checks each enabled rule in the relevant rules table, in the order in which they are listed, starting with the first rule in the list. If Rapido finds a rule whose criteria matches the object being evaluated, Rapido performs the action specified by the rule. Once Rapido finds a match, Rapido does not check any other rule in the list.
- If none of the enabled rules match the object being evaluated, the default rule is checked, if such exist.
- If none of the enabled rules match the object being evaluated, and the default rule also does not apply (or if there is no default rule), Rapido performs the default action. Typically this is "do nothing", but a different default action may apply for a particular process. In some cases, the default action can be specified using a customer parameter.
- See the relevant documentation pages for details or exceptions to the above.

You can perform the following actions on rules tables:

- Add a rule: Select **Add Rule** in the table actions list. The new rule is added to the end of the list. By default, each new rule is enabled.
- Edit a rule: Select **Edit** in the row actions list.
- Duplicate a rule: Select **Duplicate** in the row actions list. Edit the rule as required. The new rule is added to the end of the list. By default, each new rule is enabled.
- Delete a rule: Select **Delete** in the row actions list.
- Enable/disable the rule: Toggle the slider. A blue slider

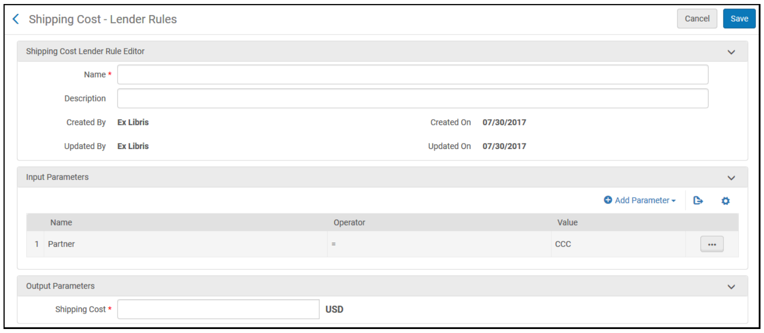
  

  indicates that the rule is enabled; a gray slider

indicates that the rule is disabled.

- Change the rule order: Select the up or down arrows in the **Move Up** and **Move Down** columns for the rule that you want to move up or down in the list.

When you add or edit a rule, a page similar to the following one appears:



Shipping Cost - Lender Rules

- Each rule requires a name. You can also enter an optional description.
- In the **Input Parameters** area, you can enter multiple criteria for the rule. On most pages, select **Add Parameter** to add criteria (in Acquisitions pages, all aspects are already present on the page in their own row). You can edit or delete criteria.
- Each criteria consists of three elements:
    - **Name** - The aspect you want to evaluate (such as the user group of the user who scanned a book or the date a request was made).
    - **Operator** - An evaluation operator, such as **=**, **<**, **>**, **Not equals**, **inList**, **NotinList**, **is empty**, **is not empty**, or **contains**.
    - **Value** - The matching value or values (for **inList** and **NotInList**, select all that apply).
- Each input parameter (**Name**) can only be selected once for each rule.
- In the **Output Parameters** area, (on some pages this area is called **Workflow Setup**), enter or select the action to perform, as described on the relevant documentation page. The value may simply be **True** or **False**, indicating whether or not Rapido performs a certain process. Or there may be several values to enter or select.
- After making any changes, select **Save**.

In the above example, if this rule is triggered, a 10 USD fee is added to the shipping cost when lending an item to the resource sharing partner East FN. Note that if a lower numbered rule is triggered, the action specified by this rule (add 10 USD to the shipping fee) is not applied, even if the criteria matches the lending request.

List, Table, and Row Actions

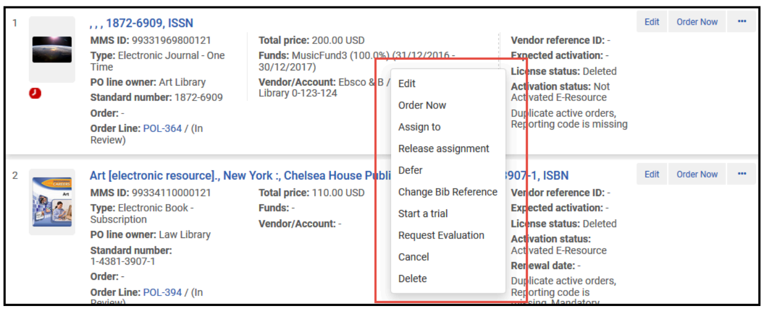
A page containing a table or list may present actions that apply to the entire table or list, or for all selected items in the table or list. This list is called the *table actions list* and it appears at the top of the table. If there are too many actions to display, additional actions are available in the **Actions** menu to the right of the displayed actions. If any of the actions can apply to selected items only, or if a page-level action (such as **Select**) can apply to selected items only, each item in the table or list appears with a checkbox.

Table Actions List

All table actions lists include the **Export Menu** icon

, with options to export all or some of the list to a Microsoft Excel file. See Export to Excel. Another common table action above a table is **Add Row**; see Adding Lines to Table. Code tables allow you to add lines in bulk; see Importing Code Table Information.

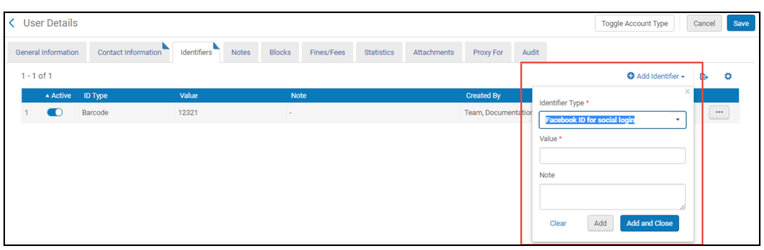
Rows in the table or list contain the *row actions list*, which are actions that apply to the specific item in the row. You can access the row actions list from the **...** menu at the right of the list or by right-selecting the item anywhere in the row as long as you are not right-selecting directly on a link). For some lists, one or two actions may be visible directly in the row.



Row Actions List

Adding Lines to Tables

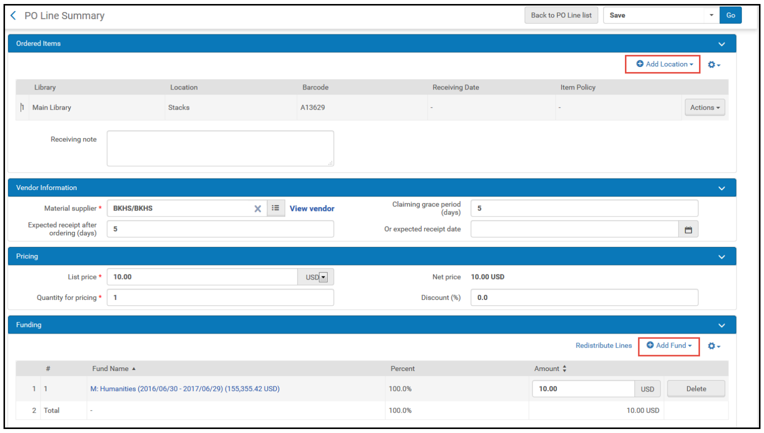
For most tables, you can add a new item by selecting **Add Row** or **Add <X>** above the table. A pane to enter the new row's information appears.



Add Row Table Action

Enter any required or optional information, or select the values from the drop-down lists, and select **Add** or **Add <X>** (to add the item without closing the pane) or **Add and Close** in the pane. All (non-obvious) fields are described on the relevant documentation page in this guide.

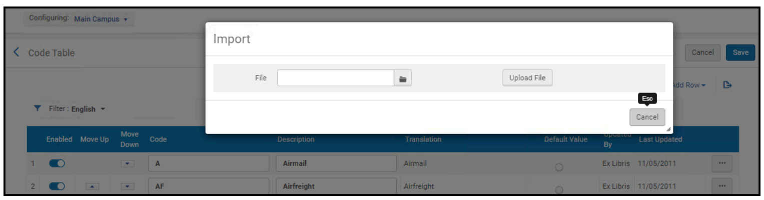
Areas within pages in which you can add multiple lines (such as locations for ordered items) also use **Add <X>** at the top of the area.



Add Row to Table

Importing Code and Mapping Table Information

On many code tables and on mapping tables, you can select **Import** in the table actions list to import data to the table in bulk. Importing information overrides all of the existing entries in the table.



Import Button on a code table

Excel files can be imported in either *.xlsx or *.xsl formats.

Note

For code tables:

- The Excel sheet must be named **CodeTable**
- The columns must be named **Code** and **Description** (case-sensitive) to match to the target, so after exporting a code table, rename the columns to these values.
- For tables in which lines cannot be added/removed manually, lines also cannot be added/removed via the import process.

For mapping tables:

- The Excel sheet must be in a specific structure. It is recommended that you export the existing table to get the existing values and the structure (if relevant), make your changes, and then import the changes back to Rapido, as described below.

To import code table information:

1. Export the file using **Export > Excel** (see Export to Excel).

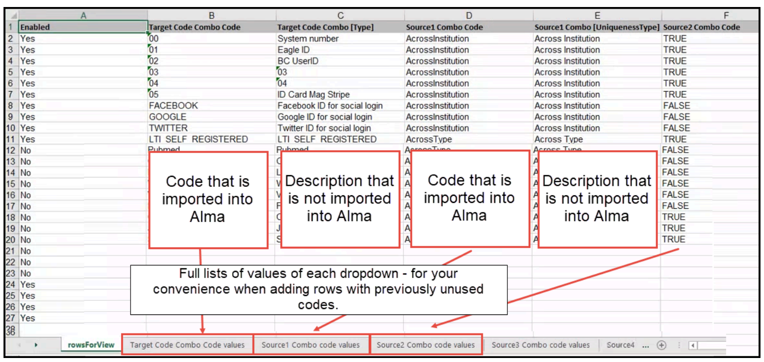
2. Open the Excel file and rename the Excel sheet **CodeTable**.
3. Make your changes and save the file. Note that there should be no duplicate lines in the Excel file.
4. Select **Import** on the relevant page. The Import Tables page appears.
5. Select **Browse** to locate your file.
6. Select **Import** to upload the file. The contents of the file appear on the page.
7. Review your changes and select **Import** to import the changes to Rapido.

To export mapping table information:

- The process as is for code tables, but without the need to change or rename the file.

  The structure of the Excel file includes the actual codes that are imported back into Rapido, in addition to columns of descriptions that help you make sense of the data, but are not imported. The description values can be duplicated. In addition, the Excel file includes additional sheets, which are also not imported back into Rapido, that provide you with full lists of codes and values that can be inserted into the Rapido dropdowns - you can use these sheets when adding new rows to the Excel file, instead of referring to Rapido for these code/value combinations.

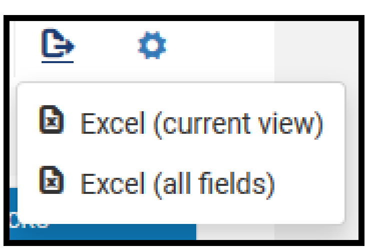
  There cannot be duplicate lines in the codes that are imported back into Rapido.



Export to Excel

On pages that contain lists or tables, you can export the list to Excel by selecting the **Export Menu** icon

and selecting **Excel**. When exporting a table with hidden columns, you can choose to export only the visible columns or all of the columns, including the hidden ones.



Export Options

See also Importing Code Table Information.

There is a limit of 100,000 lines that can be exported at one time to Excel. If the amount of information to be exported exceeds the limit, the limit appears in the tooltip when you hover your mouse over the Excel option. Filter the list to be under the limit. Otherwise, note that only the first 100,000 are exported.

During the export, Rapido displays a progress bar. Downloads proceed in the foreground. While the download is in progress, you can select **Cancel to cancel the download in progress.**

Note

If you do not want to wait for a download, you can instead create a set and run a job to export the set. For more information, see Running Manual Jobs on Defined Sets.

Values exported to the Excel sheet may not be accurate, depending on the list or table.

Tables that have an **Enabled** column are exported with the values **Yes** for enabled or **No** for disabled.

Table and Row Level Customization Mode

For some code and mapping tables, each row of the table functions as an independent unit and is customized independently, while other tables function as a single unit so all of the rows are customized together. The **Customization mode** field indicates whether the table is configured at the table level (**Entire table needs to be customized**) or at the row level (**Specific rows can be customized**). If you have customized a table whose customization mode is **Entire table needs to be customized**, new rows added by Ex Libris to this table in future releases will not be added to your table. If you have customized a table whose customization mode is **Specific rows can be customized**, new rows added by Ex Libris to this table in the future will be added to your table as well.

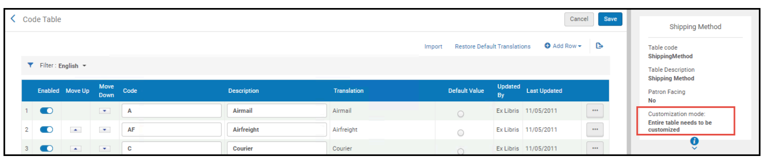
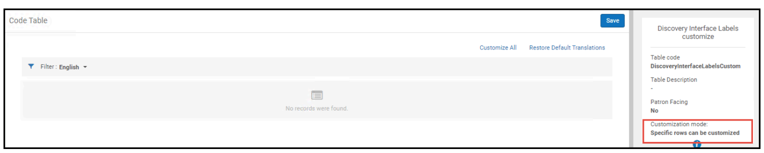


Table Level Customization



Row Level Customization

Code Table Label Translation

Multi-language institutions can configure translations of some code table labels. The workflow is different depending on whether the table is one that is configured at the table level or the row level (see Table and Row Level Customization Mode).

To customize translations of tables customized at the table level:

1. Change the language filter to a language other than **English**.
2. Edit the text in the **Translation** column.

> **Note**
>
> You need to update the column header of the **Translation** column to be the language name.

3. Select **Save**.

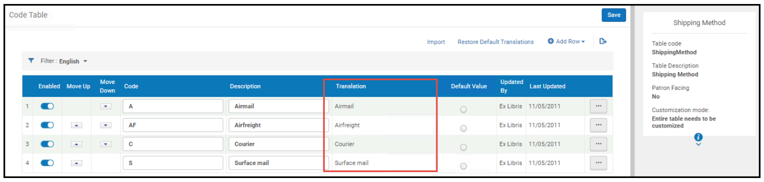


Table Level Customization

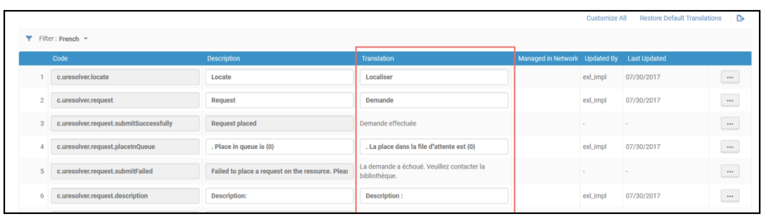
To restore the translation changes in the table, select **Restore Default Translations** in the table actions list.

To customize translations of tables customized at the row level:

1. Change the language filter to a language other than English.
2. Select **Customize** in the row actions list to customize a row, or select **Customize All** in the table actions list to make all of the rows of the table available for customizing.
3. Edit the text in the **Translation** column.

> **Note**
>
> You need to update the column header of the **Translation** column to be the language name.

4. Select **Save**.



Row Level Customization

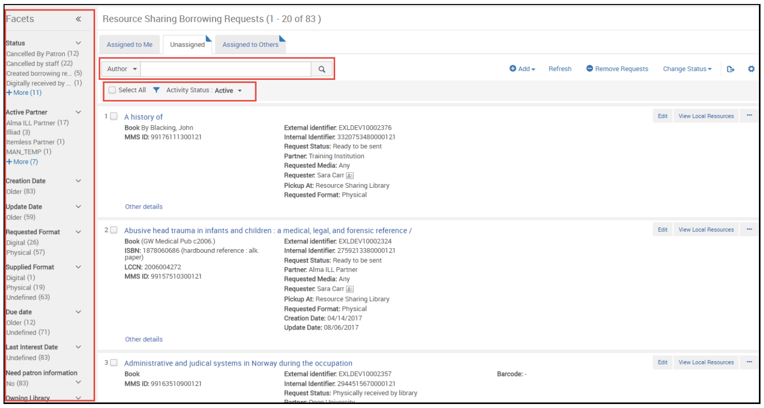
To restore the translation changes in the table, select **Restore Translations** in the row actions list of the row that you want to restore or select **Restore Default Translations** in the table actions list to restore the translations for all of the rows of the table.

Facets, Filters, and Secondary Search

You can filter the items in a list or list table using facets, filters, and the secondary search. Some or all of these appear on a page containing a list.

Facets and Filters

Facets on the left of a list match one or more of the fields or columns on the page. Beneath each of these facets is one of the available values for that field, followed by (in parentheses) the number of currently unfiltered items that match that value. Select one of the values to filter the items in the list to only those that match the selected value. The selected value appears above the list with an **X**. Select the **X** to remove that value from the filter.

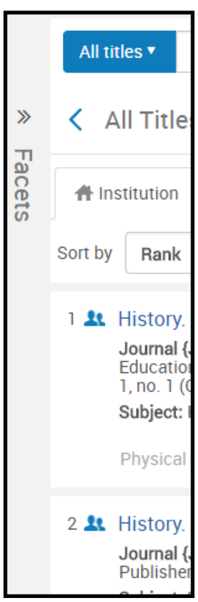
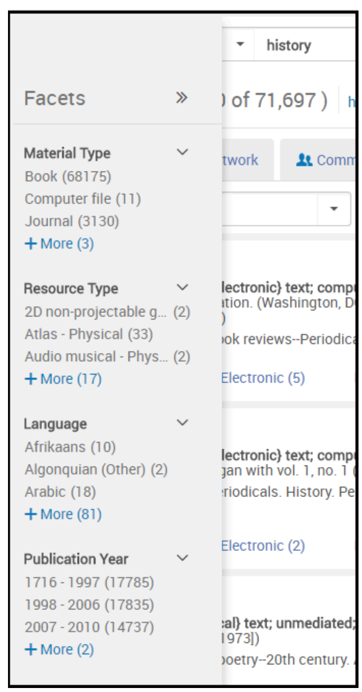


Repository Search Page

Some filters are permanent and appear over the list when the page first loads. The initial value of the filter may be pre-selected to the most common value, such as (in the above figure for borrowing requests) **Active** requests only.

Facets and filters are all single-select: you cannot select multiple values for a particular facet or filter.

The Facets panel bar can be collapsed to provide more room on the page while still remaining visible. It can be expanded again at any moment.

Collapsed State	Viewing Facets in Collapsed State	To Restore
Minimize the Facets pane by selecting **<<** beside the word **Facets**. The panel collapses into a small stripe on the left of the screen. 	You can view the facets by hovering your mouse over the Facets stripe. 	Select **>>** to restore the Facets pane.

Secondary Search

In the above figure, you can see also the secondary search box. When appearing above a table, a secondary search acts as another kind of filter for the table. Select a value from the drop-down list of fields, enter text, and select the search icon

to filter the list. Note that this search is a "contains" search (except for a code search of the resource sharing partner list, which is a "starts with" search).

You can move the keyboard focus to the secondary search box on a page by pressing the forward slash **/** on your keyboard.

Secondary Search

On various other pages in Rapido, you may use a secondary search to find or select a record, such as a user or vendor, on which to perform a certain action. These secondary searches are either plain text fields or quick pick lists (see [Drop-Down and Quick Pick Lists](#)).

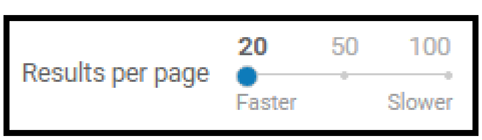
Pagination

Some lists and list tables that contain a large amount of elements are paginated. For example:

Pagination

The pagination includes the current page and the total number of pages. Typically, each page displays 10 or 20 records by default. To navigate to other pages:

- Select one of the arrows **<** or **>** (or press Alt-, or Alt-.) to display the previous or next page.
- Select a page number to display that page.
- Enter a page number in the small text box and select **Go** to display that page.
- You can select the number of lines per page. On some pages, the range is between 10 and 50. On other pages it is between 20 and 100.



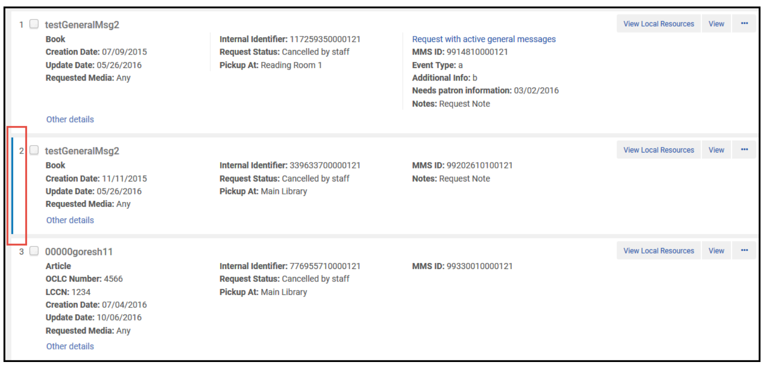
Results Per Page Tool

Note

- Rapido does not preserve selections that you make as you navigate from page to page (exception: Rapido remembers your selection for results per page). All actions on the page apply only to the visible selections you make on that page.
- If the bottom pagination is not visible, a small floating version of the pagination element appears at the bottom of the page. To navigate to a specific page when the floating pagination is visible, select the page number, enter a new page number, and press **Enter**.

Last Item Edited Indicator

After editing (or viewing) an item in a list or table, and then returning to the list or table, the page automatically scrolls to the item that you were working on and a bar appears next to the item. For example:



Last Item Edited Indicator

Working with Table Columns

You can customize columns in lists and tables throughout Rapido in the following ways:

- For columns that have up/down triangles, you can sort the rows in the table by that column by selecting the column heading. Select the column heading again to toggle between ascending and descending order.

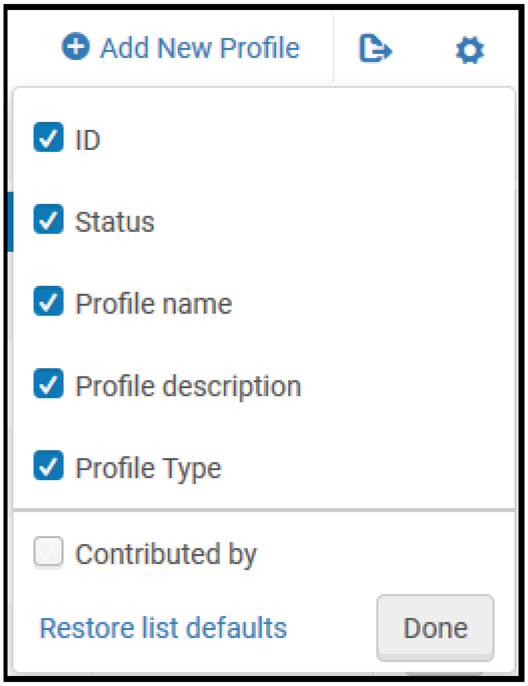
  Note

  Sorting a table changes the order of the lines in the table, and your selected sort is retained when you leave and return to the page. However, the sort has no effect on how items in the table appear in other areas of Rapido. For example, if you sort users in descending alphabetical order (Z to A) on the Find and Manage Users page, the relevant list of users still appears in ascending alphabetical order (A to Z) when selecting to assign a task to a user.

- Select between two column headings to change the width of table columns.
- Select and drag a column heading left or right to change the order of table columns.
- Hide and display columns by selecting

  in the table actions list. To configure record list columns, see Record Lists.



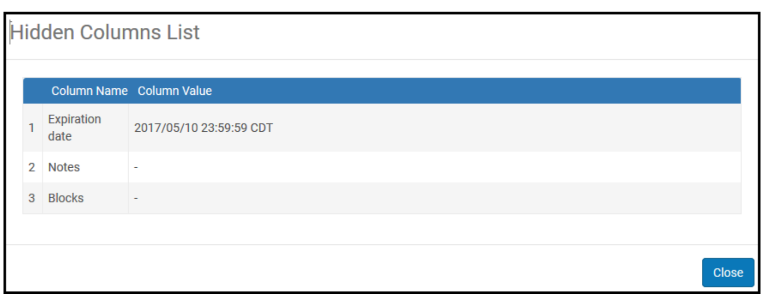
Hide/Display Columns Pane

- Clear the checkbox of a column and select **Done** to hide the column.
- Select the checkbox of a hidden column and select **Done** to have it appear.
- Select **Restore list defaults** to restore all columns to their original settings.

If you have previously customized the columns on this page, the icon has a small green dot in the lower right corner

. When you select the icon, the option to **Restore list defaults** appears. Select to restore the columns to their out-of-the-box settings.

- Select the row list action **View Hidden** to display a pop-up of any hidden fields for that row. For example:



Hidden Columns List

Note

Customizations are retained for each list after moving to another page, logging out, etc.

For a video describing this feature, see Show Hidden Columns.