

Borrowing Customization

Borrowing Policies

Use the **Borrowing Policies** ([Configuration > Resource Sharing > Configuration > Members > Borrowing Policies](#)) to set the pod priorities. Use the drag and drop icon



to drag and drop according to the order of priorities for borrowing requests.

Note

Maximum Time to Delivery cannot be left blank. If left blank, no Rapido terms appear in Primo VE and the borrowing request is not sent to Rapido pod partner. There must always be a value, even if the value is 0.

Cost to Patron			
Name	Description	Cost to Patron	Cost Type
1 Cost for staff	Cost for staff	User Group in (Staff) = 3 USD	Physical
2 Employee and Staff - digital 1	Employee and Staff - digital 1	User Group in (Employee) = 1 USD	Digital

Pod Priority		
Pod Name	Locally Managed Pod	Cost to Patron
1 United States		No cost assigned
2 Australia		No cost assigned
3 Rapid Returnables		Based on Alma terms of use
4 ReShare	✓	Based on Alma terms of use
5 United States - Midwestern states		No cost assigned
6 International		Cost for staff
7 California State Network		Cost for staff

Default Borrowing Policies			
Maximum Cost	100.00	USD	
Maximum Time to Delivery	30		
Priority	Longest loan period		

Borrowing Policies

Locally managed pods are checked when **Locally Manage Rapido Pod** is selected in [Fulfillment > Resource Sharing > Rota Templates](#).

Configure the following fields to include these terms in all offers:

- Delivery Time
- Loan Period
- Check availability and only show terms for available resources

Note

If **Check availability and only show terms for available resources** is selected, the terms only appear if the item is available.

Locally Managed Rapido Pod

Note

This section is available for fulfillment network type pods.

Borrowing Exceptions

You can associate a pod with a Rapido member.

Add exceptions to override the default borrowing policies. Borrowing exceptions can be defined to allow for variation in working with pods that differ from and override your defined default borrowing policies. The borrowing exceptions do not apply to locally managed pods.

Borrowing Exceptions

Assigning POD Priorities at the IZ Level

For some institutions, it might be relevant to set the POD priority at the IZ level rather than at the member level. To do so, from [Resource Sharing > Configuration > Institutional Borrowing Policy](#), select **Use Institutional Borrowing Policies**. Define your **Default Borrowing Policies** and **Save**. Using this feature overrides the settings in the individual member's policies ([Resource Sharing > Configuration > Members](#)).

Note

Maximum Time to Delivery cannot be left blank. If left blank, no Rapido terms appear in Primo VE and the borrowing request is not sent to Rapido pod partner. There must always be a value, even if the value is 0.

Use Institutional Borrowing Policies

Copyright Rules

The copyright rules must be activated to activate copyright management on the borrower side of the request.

For more information, watch [Copyright Management](#).

Note

The `rs_borrower_copyright_management` parameter (**Fulfillment > General > Other Settings**) must be set to `true` for the copyright rules to work.

The Rule of Five is an out-of-the box rule and is disabled by default. When enabled, the rule causes the sixth digitally requested request that is placed within the same calendar year for the same material (that has been published within the last five years) to automatically be marked as **copyright approved**. The request is still sent, but the copyright status is reportable in **Analytics**.

Configure the copyright rules from **Configuration > Resource Sharing > Rapido Rules > Borrowing Copyright Rules**.

Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date
<input type="checkbox"/>			Rule of Five	Rule of Five	Staff, Ex Libris	02/04/2021
<input checked="" type="checkbox"/>			all requests	-	Staff, Ex Libris	02/07/2021
<input type="checkbox"/>			percentage	-	Staff, Ex Libris	02/07/2021

Rule Name	Description	Updated By	Update Date
1 No Copyrights Required	No Copyrights Required	Staff, Ex Libris	12/09/2019

Borrowing Copyright Rules

When adding a rule, the following parameters are available by default:

- Number of Requests in Calendar Year — How many times a resource can be requested in a given year.
- Request Type — Electronic or Digital.
- Total Copyright Work Percentage — Up to what percentage of a resource can be requested for Electronic and Digital.

Note

The Total Copyright Work Percentage copyright rule is not applicable for eBooks.

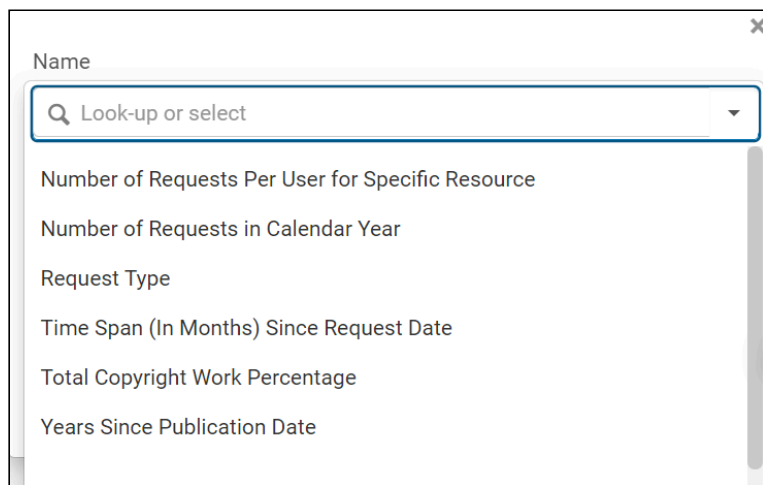
- Years Since Publication Date — When a resource was published.
- Number of Requests Per User on Specific Resource — This parameter determines how many requests a user is allowed to make for a resource. For articles, this is determined by ISSN, volume, and issue (if any of these are empty

the rule will be skipped). For books, this is determined by ISBN. Additionally, it is calculated based on how many requests the user has for the same resource in the same calendar year.

- Time Span (In Months) Since Request Date — The amount of time that needs to pass before a resource can be re-requested.

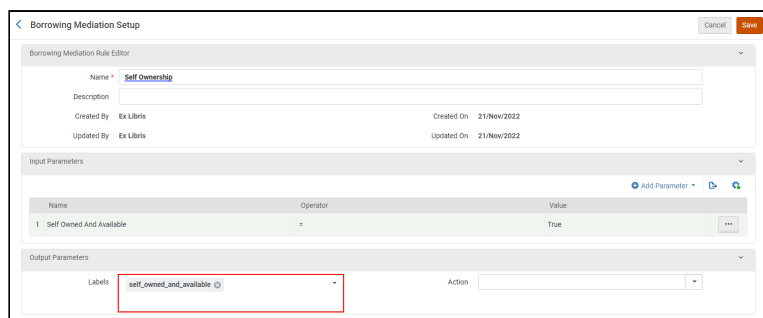
Note

Rapido can only calculate the total work percentage if the total number of pages is known, and the page fields are populated. Without this information, the rule will be skipped. This case mostly occurs for requests placed via the blank form Resource Sharing requests and not from a Rapido offer, since the Rapido offer includes all the metadata.



Copyright Parameters

You can add a label to easily determine which copyright rule was applied to a request. When a request meets the rule, the label appears in the task list. Additionally, you can create a set based on the copyright label.



Labels

Select to enable **Copyright Clearance** to automatically approve or reject the copyright clearance request.



Copyright Clearance

Note

The Rapido rules only apply to borrowing requests. For Alma copyright rules, which apply to lending requests, see [Configuring Digitization and Copyright Rules](#).

Adding a Digitization and Copyright Rule

The digitization and copyright rules that you define apply to all libraries within the institution.

To add a new digitization and copyright rule:

1. From the Digitization Workflow Rules List page (**Configuration > Fulfillment > Copyright Management > Digitization and Copyright Rules**), select **Add Rule**. The Digitization Workflow Setup page appears.

Digitization Workflow Setup

Note

To create a copy from an existing digitization and copyright rule, select **Duplicate** from the row actions list. Once you have copied the rule, you can edit it, as required.

2. In the **Digitization Workflow Rule Editor** section, enter a name (required) and description (optional) for the rule.
3. In the **Input Parameters** section, enter clauses for the rule. Each clause has a clause type (**Name**), **Operator**, and **Value**. A clause may look like `User group = Graduate student or Publication date contains 2010`. The clause list is as follows:

Digitization and Copyright Rule Clause Types

Name	Type	Description	Operators	Values
Article Title Exists	Comparison	Verify if the requested article is already requested by another copyright clearance request. The article is identified by ISSN, volume, issue, and pages.	=	<ul style="list-style-type: none">◦ true◦ false
Articles in Issue	Evaluation	Check the total number of articles in the journal issue.	<ul style="list-style-type: none">◦ >◦ =◦ <	Number

Name	Type	Description	Operators	Values
			<ul style="list-style-type: none"> ◦ Not Equals 	
Available in Electronic	Evaluation	Verify if an electronic copy exists for the material.	=	<ul style="list-style-type: none"> ◦ true ◦ false
Chapter Already Requested	Comparison	Check if the requested chapter is already requested by another copyright clearance request. The chapter is identified by ISBN.	=	<ul style="list-style-type: none"> ◦ true ◦ false
Citation Material Type	Evaluation	Check the material type.	<ul style="list-style-type: none"> ◦ = ◦ InList ◦ Is Empty ◦ Is Not Empty ◦ Not Equals ◦ NotInList ◦ contains 	The current list of material types (for example, Abstract, Anthology, and so forth).
Copyright Agency Approval Permission	Evaluation	Verify regional copyright licensing agency approval for the material. Select all values for a valid match.	InList	<ul style="list-style-type: none"> ◦ Digital Approved ◦ Scanning Approved ◦ Digital Declined ◦ Scanning Declined
Copyright Previously Approved	Comparison	Verify if the requested material is already approved by another copyright clearance request. The material is identified by various factors, such as ISBN or ISSN.	Required, but has no effect	Required, but has no effect
Copyright Record Related to Course	Filter	Restricts comparison checks to existing copyright clearance requests that are associated with a course.	=	<ul style="list-style-type: none"> ◦ true ◦ false
In the Same Academic Department	Comparison	Verify if requesting academic department is the same academic department to which the course belongs.	=	<ul style="list-style-type: none"> ◦ true ◦ false
In the Same Course	Filter	Restricts comparison checks to existing requests associated with the same course as the request. At least one of the following additional rules must be defined: Article Title Exists, Articles in Issue, Chapter Already Requested, Total	=	<ul style="list-style-type: none"> ◦ true ◦ false

Name	Type	Description	Operators	Values
		Copyright Number of Chapters, Total Copyright Work Percentage.		
Material Required Dates	Filter	Restricts comparison checks to existing requests that overlap the Date Available From/To date range of the request. If this date range is missing, use the course's date range. If there is no associated course, use today's date as the start date with no end date. At least one of the following additional rules must be defined: Article Title Exists, Articles in Issue, Chapter Already Requested, Total Copyright Number of Chapters, Total Copyright Work Percentage.	=	<ul style="list-style-type: none"> ◦ true ◦ false
Number of Requests	Comparison	Compare the number of previous copyright clearance requests to a value. The number of requests considered are only those that evaluate to true according to the Time Span (In Calendar Years) clause.	<ul style="list-style-type: none"> ◦ > ◦ = ◦ < ◦ Not Equals 	Number
Partial Digitization	Evaluation	Evaluate whether this is a partial digitization request.	<ul style="list-style-type: none"> ◦ = ◦ InList ◦ Is Empty ◦ Is Not Empty ◦ Not Equals ◦ NotInList ◦ contains 	<ul style="list-style-type: none"> ◦ true ◦ false
Patron Status	Evaluation	Evaluate the requester's active status.	<ul style="list-style-type: none"> ◦ = ◦ InList ◦ Is Empty ◦ Is Not Empty ◦ Not Equals ◦ NotInList ◦ contains 	<ul style="list-style-type: none"> ◦ Active ◦ Inactive
Publication Date	Evaluation	Evaluate the publication status of the requested item.	<ul style="list-style-type: none"> ◦ > ◦ = ◦ < ◦ Not Equals 	Number
Years Since Publication	Evaluation	Evaluates whether the publication date of the resource is within the defined time range	<ul style="list-style-type: none"> ◦ > ◦ = 	Number

Name	Type	Description	Operators	Values
			<ul style="list-style-type: none"> ◦ < ◦ Not Equals 	
Publisher	Evaluation	<p>Check the publisher against a pre-defined list of publishers.</p> <p>Set the parameter publisher to check against all publishers.</p>	<ul style="list-style-type: none"> ◦ = ◦ All ◦ InList ◦ Is Empty ◦ Is Not Empty ◦ Not Equals ◦ NotInList ◦ contains 	Publisher
Request Type	Evaluation	Verify the request type.	<ul style="list-style-type: none"> ◦ = ◦ InList ◦ Is Empty ◦ Is Not Empty ◦ Not Equals ◦ NotInList ◦ contains 	<ul style="list-style-type: none"> ◦ Borrowing resource sharing digitization request ◦ Course related digitization ◦ Lending resource sharing digitization request ◦ Patron digitization ◦ Staff digitization
Required Pages	Evaluation	Verify the number of pages requested by the current request.	<ul style="list-style-type: none"> ◦ > ◦ = ◦ < ◦ Not Equals 	Number
Resource Total Pages	Evaluation	<p>Check the total number of pages of the entire work (how many total pages are in the item being requested). This information is calculated based on the value in the Pages field in the Edit Reading List Citation page. If the Resource Total Pages field contains characters that are not digits or roman numerals followed by digits or roman numerals, then the calculation will not work. For example, the rule will not be able to process the following: vi, 336 pages,24. In this case, you can manually enter the value in the Resource Total</p>	<ul style="list-style-type: none"> ◦ > ◦ = ◦ < ◦ Not Equals 	Number

Name	Type	Description	Operators	Values
		Pages field in the Copyright Attributes tab in order for the rule to process the calculation.		
Time Span (In Calendar Years)	Evaluation	Verify that the request was made within / before the indicated number of years. This value also acts as a filter clause for the Number of Requests clause.	<ul style="list-style-type: none"> ◦ > ◦ < 	Number
Total Copyright Number of Chapters	Comparison	Verify the total number of chapters requested, including previous requests. Rapido looks at the ISBN, then looks at all outstanding and overlapping requests with the same ISBN, extracts which chapters are being / have been requested, and sums them up to get this value.	<ul style="list-style-type: none"> ◦ > ◦ = ◦ < ◦ Not Equals 	Number
Total Copyright Work Percentage	Comparison	Verify the percentage of the work requested, including previous requests. Rapido looks at the ISBN, then looks at all outstanding and overlapping requests with the same ISBN, extracts which pages are being / have been requested, and sums them up to get this value. This rule evaluates to false if the number of pages is not specified.	<ul style="list-style-type: none"> ◦ > ◦ = ◦ < ◦ Not Equals 	Number between 0 and 100
User Group	Evaluation	Evaluate the user group of the requester. The list of values includes all user groups.	<ul style="list-style-type: none"> ◦ = ◦ InList ◦ Is Empty ◦ Is Not Empty ◦ Not Equals ◦ NotInList ◦ contains 	A user group

Example:

◦ **Clauses:**

- Total Copyright Work Percentage < 10 Material
Note that the number is rounded. For example, Total Copyright Work Percentage <16 means that everything up to 16.4% is included.
- Material Required Dates = True
- Request Type = Course related digitization
- Copyright Record Related to Course = True

Existing, Previous Request:

- ISBN 1-86189-411-2
- Dates 1/1/2016 - 30/1/2016
- Pages 15-20 (6 pages)

- Status Approved
- **New Request 1:**
 - ISBN 1-86189-411-2
 - Dates 10/1/2016 - 2/2/2016
 - Pages 35-40 (6 pages)
 - Total Resource Pages 220

Expected Result: Rule is applied because total percentage is still less than 10% (12 pages / 220 in resource)

- **New Request 2:**
 - ISBN 1-86189-411-2
 - Dates 15/1/2016 - 3/2/2016
 - Pages 40-60 (21 pages)
 - Total Resource Pages 220

Expected Result: Rule is not applied because total percentage for same item is now over 10% (27 pages / 220 pages in resource)

4. Select **Add Parameter**. The clause is added to the rule.
5. Repeat the previous two steps to add additional clauses.
6. Under **Workflow Setup**, select the digitization target. For more information, see [Digitization Processing](#).
 - **Digital inventory (representation)** – The digitized files are added to titles. Enter the following additional fields:

Note

- The usage type and access rights policy can be changed when adding the digital file to the record, but the collection cannot.
- When creating digital inventory, you can determine if a representation is remote.

-
- Active / Inactive – determines if the representation is discoverable.
 - Default Collection – The default collection to which to assign the title (if not already assigned).
 - Usage Type – Whether the representation is the Master copy or a Derivative. (The master is the original copy and the derivative is, for example, a copy with a lower resolution.)
 - Access Rights Policy – The policy that defines the permissions that patrons have to request digital resources.
 - **Document delivery - attachment** – The digitization request requires only a portion of the resource to be digitized.
 - **Document delivery - link** – Enables the operator to upload files to a document storage folder and send the file link to the patron. If multiple files are uploaded, they are stored in the folder as a .zip file and will download to the customer as a .zip file. When this option is selected, another field appears: **Maximum views**. Enter the number of times the patron may access this link before it is automatically deleted from the server. Note that if no value is entered in this field, then the number of accesses is not limited.

Note

If this option is used for resource sharing requests, and the borrowing partner is not a member of the same network zone as the lender institution (or there is no network zone set up for the institutions), then the **Institution Code** must be configured on the borrower's partner record with the borrower's institution code. See [Resource Sharing Partners](#).

If the digitization workflow rule defines the digitization target as an attachment, an email is sent to the requester email with the document as an attachment to the email.

Note

Rapido has an attachment size limitation. Additionally, the email provider may remove attachments that are larger than the email provider's size limit.

Alma ISO partners — If the digitization workflow rule defines that the digitization target is a link, then there is no size limitation and the file is stored (either on the borrower or lender side) for the patron to access.

All peer-to-peer partners (except for Alma ISO partners) — Even if the digitization workflow rule defines the digitization target as a link, an email is sent to the requester email with the document as an attachment to the email.

7. Under **Approval/Copyright Clearance Processing**, select:
 - **Approval** – The request requires approval by a user with the Digital Approval Operator role.
 - **Copyright clearance** – The request requires copyright clearance by the Digitization Manager.
8. If you select either of the two previous options, select how the approval affects the digitization workflow:
 - **In parallel to digitization workflow** – The digitization workflow is activated without waiting for the approval task to be approved, but does not finish until the approval task is approved. This is the default option.

The representation is handled as follows:

 - While the request is being processed, the representation is marked as inactive.
 - If the request is approved, the representation is marked as active.
 - If the request is rejected, the representation is deleted.
 - **Blocks digitization workflow** – The request workflow is activated only after the approval is completed.
 - **Automatically approved** – A new approval task is created as **Approved**, and the request workflow continues.
9. Select **Save** to store the new rule.

If you define more than one rule, use the **Move Up** and **Move Down** arrows to set the order of the rules. The order of the rules is important, as the system applies the first (and only the first) appropriate, enabled rule. If no appropriate rule is found, the system uses the default rule.

Mediation Rules

Any borrowing request created in Rapido is automatically sent to a matching lender based on a Rapido offer or locally managed rota templates. Use the [Configuration > Resource Sharing > Rapido Rules > Borrowing Mediation Rules](#) to establish rules for when requests should not automatically be filled and require staff mediation to advance the request to the next step.

See [Rapido Borrowing Mediation Rules](#).

Mediation rules are created with a condition that enables the request to be sent to the lender if that criteria is met. For example, consider the below rule for managing requests that have been placed for resources that are owned by the library:

- Any request that meets the criteria of **Self Ownership=True** is stopped for mediation.
- An 'exit criteria' rule requires that there is no **SELF_OWNED_APPROVED** label.

The result of this rule is that requests are stopped for mediation (i.e. the status is **Ready to be sent**) even when there is a known potential lender. To enable the request to continue its lifecycle, the operator removes the **SELF_OWNED** label (that is automatically assigned by the rule) from the request and adds a **SELF_OWNED_APPROVED** label instead.

Name	Operator	Value
1 Self Ownership	-	True
2 Labels	Not In List	SELF_OWNED_APPROVED

Labels	Action
SELF_OWNED	-

Borrowing Mediation Rule Editor

Use the [Configuration > Resource Sharing > Rapido Rules > Borrowing Mediation Rules](#) to add labels to control your mediation rules.

Labels are automatically created based on mediation rules. Each rule's **Output Parameter** determines when manual intervention is required to handle a request.

Name	Operator	Value
1 Self Owned And Available	-	True

Labels	Action
self_owned_and_available	-

Borrowing Mediation Setup

Note

Requests with a mediation rule to stop requests for self-owned resources (**Self Ownership = True** and **Self Owned And Available = True**) are stopped regardless of the **Ignore Local Holding** ([Fulfillment > Resource Sharing > Partners > Parameters tab](#)) setting.

Note

For mediation rules such as Missing article/book metadata there are two optional operators:

- **In List** — requires all selected fields to be filled to send the request without mediation.
-

-
- **All In List** — does not stop for mediation if at least one field is filled in so that the users can send requests to lenders even if only one field is populated.
-

Note

For testing purposes, see [Testing Your Workflow for Borrowing/Lending Requests](#) for creating test mediation rules.

Available Mediation Input Parameters

Below are the available mediation rules:

- Borrowing Owning Library
- Converted from hold request
- eBook Request
- Excel with ISBN/ISSN — Upload a spreadsheet that contains ISBNs/ISSNs that the institution does not want to allow resource sharing for those resources
- Invalid ISSN
- Invalid ISBN
- Labels
- Missing article metadata fields
- Missing books metadata fields
- Needed by date
- Number of requests for the same resource within a given period of time
- Partner
- Pickup Location
- Price
- Rapido request
- Request with note
- Request status
- Requested format
- Requested Format Changed To
- Requester (only for testing purposes. For more information, see [Testing Your Workflow for Borrowing/Lending Requests](#).)
- Requests created from blank form
- Self Owned And Available
- Self Owned_Available and Requestable
- Self ownership
- Statistical category of requester
- Supplying Pod
- User Authorized for Resource Sharing

- User group
- Years since publication date

Available Mediation Actions

The following actions are available for mediation rules:

- Cancel Request — automatically cancels requests when the mediation rule applies to a request.
- Fill Locally — manually fill a digital request that is readily available. Also see [Automating the Process](#).

Note

The **Fill locally** action is not supported for eBook requests. We recommend including an input parameter with **not equals eBooks** when using a mediation rule with the **Fill locally** action.

- Test Locally — enables libraries to interact locally to create borrowing and lending requests at the local institution physical and digital requests. Also see [Testing Your Workflow for Borrowing/Lending Requests](#).

Configuring Send Borrower Document Delivery Rules

Borrowers can set up rules to determine whether a digitally received resource should automatically be shared with the requesting patron or wait for library staff handling before being forwarded to the requesting patron. For example, the document may require processing to increase requester accessibility.

When configuring a Send Borrower Document Delivery Rule (**Configuration > Fulfillment > Resource Sharing > Send Borrower Document Delivery Rules**), the default **Send Document Delivery** value is `true`. When set to `true`, documents are automatically forwarded unless a rule is configured to prevent forwarding.

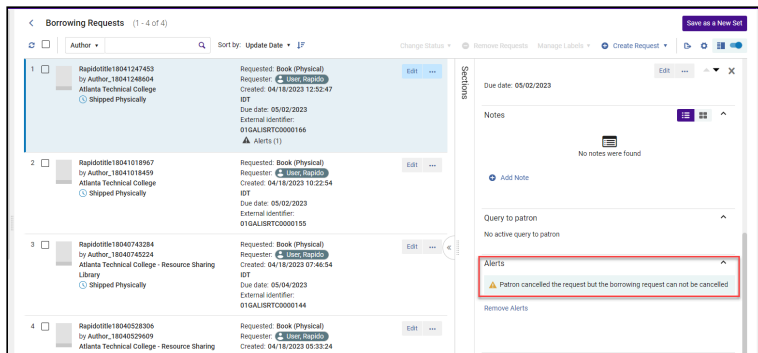
Send Borrower Document Delivery Rule Editor

See also [Peer to Peer Resource Sharing](#).

Alerts

Managing Borrowing Alerts

Alerts are added to requests when information about the request needs to be communicated to the borrower.



Borrowing Request Alert

The following alerts are currently supported and can be configured from [Configuration > Resource Sharing > Manage Borrowing Alerts](#):

Borrowing Alerts

Code	Description	Enabled By Default
CANCELLED_BY_PATRON	Patron cancelled the request but the borrowing request can not be cancelled	Yes
FAILED_TO_UPDATE_PICKUP	Failed to update pickup location	Yes
LOAN_CONDITION	The request has loan condition	No
UPDATE_LENDER_DUE_DATE_FAILED	Failed to update lending request due date	No
WAITING_FOR_RAPID_RESPONSE	Waiting for Rapid Response	Yes

Configuring Borrowing Request Inactive Filters

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

- General System Administrator
- Fulfillment Administrator

In order to filter statuses out of the Active Borrowing Requests Rapido Sets, access the Borrowing Requests Inactive Filters code table ([Configuration > Fulfillment > Resource Sharing > Borrowing Requests Inactive Filters](#)). For more information, see [Code Tables](#).

Note

If you customize the code table, you **must contact support** to re-index the borrowing requests to apply your changes.

Code Table Cancel Customize

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

Borrowing Requests Inactive Filters i

Table code: BorrowingRequestsInactiveFilters Table Description: Borrowing Requests Inactive Filters

Patron Facing: No

Customization mode: Entire table needs to be customized

Restore Default Translations

Filter: English v

Enabled	Move Up	Move Down	Code	Description	Translation	Default Value	Updated By	Last Updated
<input type="checkbox"/>			CANCELLED	Cancelled by partner	Cancelled by partner	<input type="radio"/>	-	-
<input type="checkbox"/>	▲	▼	CANCEL_REQUESTED	Cancelled by staff	Cancelled by staff	<input type="radio"/>	-	-
<input type="checkbox"/>	▲	▼	CANCELLED_BY_PATR	Cancelled By Patron	Cancelled By Patron	<input type="radio"/>	-	-
<input type="checkbox"/>	▲	▼	RECEIVED_DIGITALLY	Digitally received by IIR	Digitally received by library	<input type="radio"/>	-	-
<input type="checkbox"/>	▲	▼	EXPIRED	Expired	Expired	<input type="radio"/>	-	-
<input type="checkbox"/>	▲	▼	REJECTED	Rejected by partner	Rejected by partner	<input type="radio"/>	-	-

Borrowing Request Inactive Filters

Enabling a row means that the status is removed from the Active borrowing request display in the task list.

Customizing Borrowing Cancellation Reasons

Each institution can customize the list of request-cancellation reasons that appear in the dropdown list of reasons when cancelling requests like holds or resource-sharing borrowing requests. The text available for each of the standard reasons can be modified, and reasons that are not relevant to the institution can be removed from the dropdown list. In addition, the institution can create up to ten new reasons to add to the dropdown list. These options enable the institution to create a list of options that only includes reasons that are actually in use in their libraries, thus preventing problems that arise when an inappropriate reason is selected. The list of cancellation reasons can be edited from [Configuration > Fulfillment > Request Cancellation Reasons](#).

Configuring Patron Query Templates

To configure patron query templates, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Patron query templates are configured on the Patron Query Templates mapping table ([Configuration > Fulfillment > Resource Sharing > Patron Query Templates](#)). For more information about mapping tables, see [Mapping Tables](#). Each template contains a brief list of fields that are assembled to create the letter sent to the patron. The initial format of the letter is not configurable, but – if configured – the letter can be edited before it is sent.

Note

This option only appears when the **send_query_to_patron_use_xsl** in the Customer Parameters Mapping Table is set to **false** (see [Configuring Other Settings](#)). When **send_query_to_patron_use_xsl** is set to **true**, the Patron Query Types option displays instead (see [Configuring Patron Query Types](#)).

Enabled	Name	Subject	Header	Query Line 1	Query Line 2	Query Line 3	Edit if Single	Updated By	Last Updated
<input checked="" type="checkbox"/>	Regarding	Your rec	Dear Sir	I please			true	-	-

Patron Query Templates Mapping Table

The following actions can be performed on this page:

- Add a patron query template (see [Adding Patron Query Templates](#))
- Edit a patron query template (Modify the column values in the **Mapping Table Rows** section).
- Delete a patron query template (select **Delete**).

Adding Patron Query Templates

You can add a patron query template.

To add a patron query template:

1. Open the PatronQueryTemplates Mapping Table (**Configuration Menu > Fulfillment > Resource Sharing > Patron Query Templates**).
2. Select **Add Row**. Enter a name for the template in the **Name** field.
3. In the **Subject** field, enter a subject. You can use the variables `%reqId%` and `%reqName%`; these will be replaced with the borrowing or lending request's external ID or the patron's name, respectively.
4. In the **Header** field, enter a header, such as "Dear Sir/Madam:".
5. Enter additional lines in **Query Line 1**, **2**, and **3**. These fields are substituted into the Query to Patron Letter. For more information, see [Example Letter Customization: Query to Patron Letter](#).
6. In the **Edit if Single** field, enter **True** if the message will be open for editing, or **False** if the message is sent directly to the patron without any opportunity for editing.
7. Select **Add Row**. The template appears in the list of templates.
8. Select **Customize**.

The fields are assembled into a letter that is sent when a user selects **Send Query to Patron** on the Borrowing Requests in the actions menu.

Configuring Patron Query Types

To configure patron query types, you must have one of the following roles:

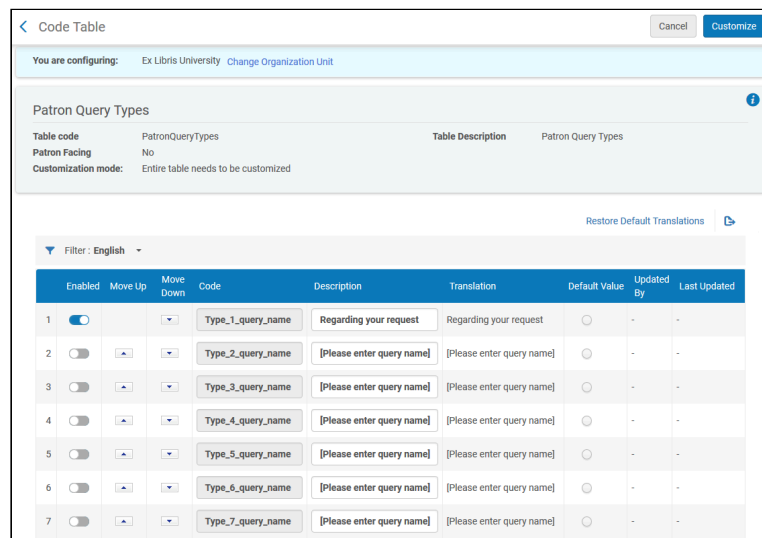
- General System Administrator
- Fulfillment Administrator

You can configure alternative versions - *patron query types* - of the Query to Patron letter using the enhanced XSL Query to Patron letter. You can define up to thirty types of this letter in this way.

Patron query types are configured on the Patron Query Types code table ([Configuration Menu > Fulfillment > Resource Sharing > Patron Query Types](#)). For more information about code tables, see [Code Tables](#).

Note

This option appears in the menu only when the **send_query_to_patron_use_xsl** in the Customer Parameters Mapping Table is set to **true** (see [Configuring Other Settings](#)). When **send_query_to_patron_use_xsl** is set to **false**, the Patron Query Templates option appears instead (see [Configuring Patron Query Templates](#)). The Patron Query Templates option will become obsolete in the future.



Enabled	Move Up	Move Down	Code	Description	Translation	Default Value	Updated By	Last Updated
<input checked="" type="checkbox"/>			Type_1_query_name	Regarding your request	Regarding your request	<input type="radio"/>	-	-
<input type="checkbox"/>	▲	▼	Type_2_query_name	[Please enter query name]	[Please enter query name]	<input type="radio"/>	-	-
<input type="checkbox"/>	▲	▼	Type_3_query_name	[Please enter query name]	[Please enter query name]	<input type="radio"/>	-	-
<input type="checkbox"/>	▲	▼	Type_4_query_name	[Please enter query name]	[Please enter query name]	<input type="radio"/>	-	-
<input type="checkbox"/>	▲	▼	Type_5_query_name	[Please enter query name]	[Please enter query name]	<input type="radio"/>	-	-
<input type="checkbox"/>	▲	▼	Type_6_query_name	[Please enter query name]	[Please enter query name]	<input type="radio"/>	-	-
<input type="checkbox"/>	▲	▼	Type_7_query_name	[Please enter query name]	[Please enter query name]	<input type="radio"/>	-	-

Patron Query Types Code Table Page

Adding a Patron Query Type

You can add a patron query type by enabling one of the types in the code table and configuring it.

To add patron query types:

1. In the Patron Query Types code table ([Configuration > Fulfillment > Resource Sharing > Patron Query Types](#)), enable one of the disabled patron query types.
2. Modify the **Description** of the type you enabled. It is this **Description** that appears in the drop-down list of query types when **Send query to patron** is selected from the row actions of a Borrowing Request. The code is used in the XSL of the letter to map the query type to the text that will appear in the Query to Patron letter when the user selects that type of query.
3. Repeat the steps above to add additional patron query types, as required.
4. Select **Save** when you are done.

For information about configuring the Query to Patron letter for the enabled patron query types, see [Configuring Rapido Letters](#).

Note

The default XSL template only includes rules for patron query types 1 and 2. If your system has more than two types defined, you must add rules for the additional types to the template before you can configure them. You can do this by copying one of the existing rules and modifying the copy as required for each additional rule.

Configuring Patron Queries

The Query to Patron Letter is sent to the patron when a user selects the Send Query to Patron action from a Borrowing Request item. (See [Managing Borrowing Requests Send Query to Patron](#).) Rapido provides two systems for configuring these letters in Rapido: *patron query templates* and *patron query types*. We recommend using patron query types.

- Old system: Patron query templates are a basic means of configuring patron letters. You can enter multiple letters and configure the fields in the letters. You cannot edit the initial structure of the letter, but – if configured – you can edit the letter before it is sent.

This system is deprecated and will be removed in an upcoming version.

- New system: Patron query types use Alma's flexible XSL style sheet letter configuration system for each query, which is more flexible. You can define up to thirty types of letters that will be sent when a user selects to send a query to a patron, for example, a welcome letter, a response to a request, and so forth.

You can configure Rapido to use either patron query templates or types, but not both, using the **send_query_to_patron_use_xsl** parameter ([Configuration > Fulfillment > General > Other Settings](#)). We recommend setting this parameter to `true`.

Note

Patron query types are deployed by default. Patron query templates are deprecated and will be removed in a future version of Rapido.

Requests are sent using the **Send Query to Patron** link beneath a resource request on the Resource Sharing Borrowing Requests page.