

Using a Second Broker

Last Resort Partners — Process Requests Using Another Broker

Configuring a Last Resort Partner

Managing your requests in Rapido supports the user experience for staff and patrons. By adding partners from other systems, you can maximize the number of requests that are managed in one place with the familiar automated workflows. Libraries may want to use another broker if requests are unfilled by partners established in Rapido. See [Establishing New Partners](#).

There are various reasons that libraries may opt to utilize a second resource sharing solution or broker. Connecting Rapido with another interlibrary loan system is processed through another broker or partner of last resort. This is used for moving unfilled requests from Rapido into another system for processing within that system. You can then create a rota template with the partner of last resort and add a rota assignment rule for using this partner. See [Configuring Rota Templates](#) and [Configuring Rota Assignment Rules](#).

Rapido and ILLiad

Alma institutions that are “Lenders Only” can specify whether they are managing resource sharing from Alma or ILLiad. If ILLiad is selected (**Configuration > Resource Sharing > Configuration > Members**) the lending request for this institution is created and can be managed from ILLiad.

The screenshot shows the 'Edit Resource Sharing Member' form. The 'Manage request in' section has two radio buttons: 'Alma' and 'ILLiad'. The 'ILLiad' radio button is selected and highlighted with a red box. Other fields include 'Institution Name' (NGRS INST 03 Inst), 'Name' (Resource Sharing Library), 'Description', 'Category', 'Pods form part of' (East), 'Status' (Active), 'Currency' (US Dollar), 'Server', 'Part', and 'RID symbol'.

Member Attributes - ILLiad

When a request status changes from being calculated to presenting the Lending library details, the Lending library information and contact details are also available in the right pane.

Enter the parameters **User identifier regex** (**Fulfillment > Resource Sharing > Partners > ILLiad partner**) so that when requests are passed to ILLiad, ILLiad recognizes the identifier. By default, this field is blank.

The **User identifier regex** field in the example below indicates that Alma should use the identifying information until the @ to match the User identifier type `Primary Identifier` in ILLiad.

Regex identifier fields

For more information, see the [Developers Network](#).

Rapido and ReShare

Rapido enables you to push user borrowing requests to ReShare (**Fulfillment > Resource Sharing > Partners**). Rapido can check whether the resource is found in the ReShare network without your users needing to leave their known discovery system. Additionally, your users do not need to enable Rapido to search for the resource they need through the various resource sharing options that your institution supports.

ReShare integration

Enter the ReShare credentials on the **Parameters** tab.

The RESHARE SHARED INVENTORY CONFIGURATION section is used for searching on the ReShare network.

The RESHARE OPENURL CONFIGURATION section is used for pushing borrowing requests.

The RESHARE API (MOD-RS) CONFIGURATION is used for syncing Rapido with the ReShare request.

The **ReShare Updates Job** (**Admin > Monitor Jobs > Fulfillment > Scheduled** tab) runs every four hours and is enabled automatically upon configuring ReShare.

Pod Name	Locally Managed Pod	Cost to Patron
1 ReShare	✓	Based on Alma terms of use
2 United States - Midwestern states		No cost assigned
3 United States		No cost assigned

ReShare credentials

Add the ReShare partner as a locally managed Rapido pod (**Fulfillment > Resource Sharing > Rota Templates**).

General Information - Locally Manage Rapido Pod

Once the partner record is added to a rota, you can order the pod priority from the **Borrowing Policies** ([Configuration > Resource Sharing > Members](#)) tab.

Note

To ensure a smooth integration, verify that the pickup locations list in Rapido is configured in ReShare as well.

Pod Name	Locally Managed Pod	Cost to Patron
1 ReShare	✓	Based on Alma terms of use
2 United States - Midwestern states		No cost assigned
3 United States		No cost assigned

Borrowing Policies

Rapido and Tipasa

You can push borrowing requests from Rapido to Tipasa to further process requests. NCIP updates are also sent to Alma as required.

This option enables requests that have not been fulfilled by a local peer-to-peer rota to be automatically pushed into Tipasa, where they are further processed as a broker-managed request. This eliminates the need to manually transfer such requests to Tipasa.

Enter Tipasa in the **Fulfillment > Resource Sharing > Partners > General** tab. Configure the API settings in the **Fulfillment > Resource Sharing > Partners > Parameters > EXPORT TO THIRD PARTY** section.

To enable third party integrations to better support and manage requests, the **Pickup Location**, library **Name**, and library **ID** are automatically transferred when sending Tipasa requests. Additionally, when **Send requester information** (**Fulfillment > Resource Sharing > Partners > Parameters** tab) is checked, other patron details such as their email address, username, first name, and last name are also included when sending the request.

Export to Third Party

For the **Export to Third Party** radio button, select **Yes**. Enter the URL and API key as supplied by Tipasa, and the Requesting agency ID that they expect to identify your library.

The **Close request when exported** defines whether the borrowing request is closed after export or is managed under the same borrowing request. Since these systems are not able to use the exported request's ID to further send NCIP messages that hook up to the existing request, we recommend setting this parameter to **true**, resulting in the request being closed in Alma when it is exported. A new request with a different ID is created when the item is received in Tipasa, as it is with other NCIP broker systems.

Rapido and WorldShare

You can push borrowing requests from Rapido to WorldShare to further process requests.

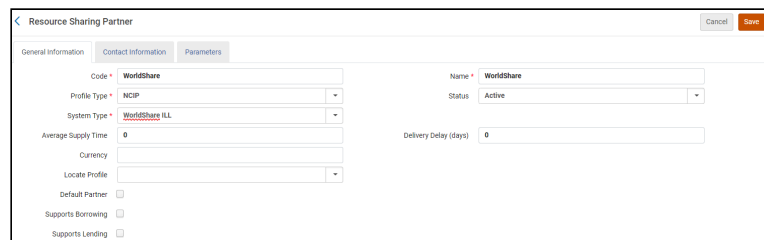
This option enables requests that have not been fulfilled by a local peer-to-peer rota to be automatically pushed into WorldShare, where they are further processed as a broker-managed request. This eliminates the need to manually transfer such requests to WorldShare.

WorldShare ILL can be set up in a peer-to-peer rota as a supplier for last resort (see [Peer-to-Peer Resource Sharing](#) in the Resource Sharing Guide).

Note

To enable information to be transferred to an NCIP broker, the parameter **rs_block_sending_requester_info** ([Configuration > Fulfillment > General > Other Settings](#)) must be set to `false`. For more information, see [Configuring Other Settings \(Fulfillment\)](#).

From the [Fulfillment > Resource Sharing > Partners > General Information](#) tab, select `NCIP` as the **Profile Type** and select `WorldShare ILL` as the **System Type**.



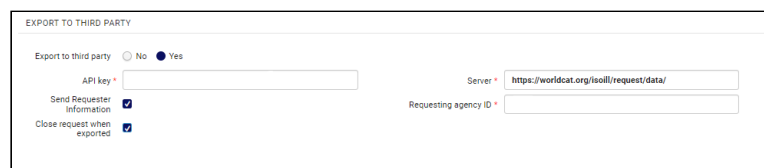
The screenshot shows the 'Resource Sharing Partner' configuration form. The 'General Information' tab is active. The 'Code' is set to 'WorldShare', 'Profile Type' is 'NCIP', and 'System Type' is 'WorldShare ILL'. The 'Name' is 'WorldShare' and 'Status' is 'Active'. 'Average Supply Time' is '0' and 'Delivery Delay (days)' is '0'. There are checkboxes for 'Default Partner', 'Supports Borrowing', and 'Supports Lending', all of which are currently unchecked.

Resource Sharing Partner configuration for WorldShare

Configure the API settings in the [Fulfillment > Resource Sharing > Partners > Parameters > EXPORT TO THIRD PARTY](#) section.

For the **Export to Third Party** radio button, select **Yes**. Enter the **API key** and **Server** URL as supplied by WorldShare ILL, and the **Requesting agency ID** that they expect to identify your library (e.g., the institution's OCLC symbol in OCLC-XXX format).

To enable third party integrations to better support and manage requests, the **Pickup Location**, library **Name**, and library **ID** are automatically transferred when sending WorldShare requests. Additionally, when **Send requester information** ([Fulfillment > Resource Sharing > Partners > Parameters](#) tab) is checked, other patron details such as their email address, username, first name, and last name are also included when sending the request.



The screenshot shows the 'EXPORT TO THIRD PARTY' configuration form. The 'Export to third party' radio button is set to 'Yes'. The 'API key' field is empty. The 'Server' field contains the URL 'https://worldcat.org/isoll/request/data/'. The 'Requesting agency ID' field is empty. There are checkboxes for 'Send Requester Information' and 'Close request when exported', both of which are checked.

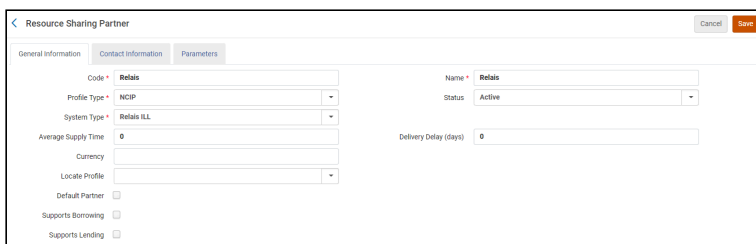
Export to Third Party

The **Close request when exported** defines whether the borrowing request is closed after export or is managed under the same borrowing request. Since these systems are not able to use the exported request's ID to further send NCIP messages that hook up to the existing request, we recommend enabling this parameter, resulting in the request being closed in Alma when it is exported. A new request with a different ID is created when the item is received in WorldShare, as it is with other NCIP broker systems.

Rapido and Relais

Relais can be configured in a resource sharing rota as a supplier of last resort (see [Peer-to-Peer Resource Sharing](#) in the Resource Sharing Guide).

From the **Fulfillment > Resource Sharing > Partners > General Information** tab, select **NCIP** as the **Profile Type** and select **Relais ILL** as the **System Type**.

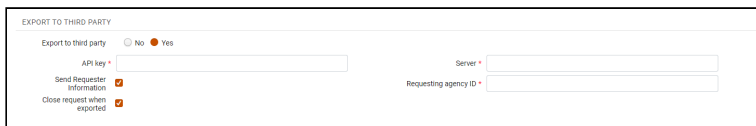


The screenshot shows the 'Resource Sharing Partner' configuration form. The 'General Information' tab is active. The 'Code' is 'Relais', 'Profile Type' is 'NCIP', and 'System Type' is 'Relais ILL'. The 'Name' is 'Relais' and the 'Status' is 'Active'. The 'Average Supply Time' is '0' and the 'Delivery Delay (days)' is '0'. There are checkboxes for 'Default Partner', 'Supports Borrowing', and 'Supports Lending', all of which are currently unchecked.

Resource Sharing Partner configuration for Relais

Configure the API settings in the **Fulfillment > Resource Sharing > Partners > Parameters > EXPORT TO THIRD PARTY** section.

For the **Export to Third Party** radio button, select **Yes**. Enter the **API key** and **Server URL** as supplied by Relais ILL, and the **Requesting agency ID** that they expect to identify your library (e.g., the institution's OCLC symbol in OCLC-XXX format).



The screenshot shows the 'EXPORT TO THIRD PARTY' configuration form. The 'Export to third party' radio button is set to 'Yes'. The 'API key' and 'Server' fields are empty. The 'Requesting agency ID' field is also empty. There are checkboxes for 'Send Requester Information' and 'Close request when exported', both of which are checked.

EXPORT TO THIRD PARTY configuration

The **Close request when exported** defines whether the borrowing request is closed after export or is managed under the same borrowing request. Since these systems are not able to use the exported request's ID to further send NCIP messages that hook up to the existing request, we recommend enabling this parameter, resulting in the request being closed in Alma when it is exported. A new request with a different ID is created when the item is received in Relais, as it is with other NCIP broker systems.

Adding a Rota

Last resort partners can be manually added to a request or added automatically by setting up a rota for the partner.

To add a rota:

1. From **Fulfillment > Resource Sharing > Rota Templates**, select **Add Template**.
2. Enter a **Code**.
3. Enter a **Name** `Partner of last resort`.
4. For **Type**, select `Non Ordered`.
5. For **Status**, select `Active`.
6. Leave **Locally Manage Rapido Pod** unchecked.
7. Select **Save and add Members**.
8. From the **General Information** tab, select **Add Partners**.
9. Select a partner from a list.
10. Select **Add Partners**.
11. Select **Save** to finish adding the partner to the rota.

Adding Rota Assignment Rules

After adding a rota, add a rota assignment rule to determine if Rapido should use the rota.

To add a rota assignment rule:

1. From **Configuration > Fulfillment > Resource Sharing > Rota Assignment Rules**, select **Add Rule**.
2. Enter a **Name**.
3. From the **Output Parameters > Rota Templates**, select a Rota Template and select **Save**.
4. Select **Save** to finish adding the Rota Assignment Rule.

Partner Based Mediation Rule

Use mediation rules to enable staff to review requests prior to sending requests to a partner of last resort. A mediation rule based on the partner as an input parameter enables staff to review a request when the request status is set to **Ready to be sent** using the assigned partner. Staff members can edit the request metadata to determine if other data could cause the request to be filled by the Enrich global index. Staff can use the [Find partner](#) workflow. Additionally, staff can choose to purchase a resource or perform other workflow actions prior to sending the request to a partner. The label is then removed from the mediated request, and the request is sent to the partner.

Example Rule Parameters

Input Parameters

Name	Operator	Value
Partner	In List	Partner Name
Labels	Not in List	SendtoPartner

Output Parameters

Labels	Action
ReveiwPartnerofLastResortUse	—