

General

Introduction

Rapido is fully integrated with Primo VE which provides users with an embedded discovery experience. In addition to this, Rapido includes a set of [APIs](#) that can be used in order for other discovery services to integrate with Rapido and enable the different Rapido services such as the Rapido offers.

This page focuses on the back-office elements that have to do with the resource sharing and fulfillment aspects of the workflow.

Library processing of Rapido requests, on both the borrower side and lender side, is based on standard resource sharing workflows and requires the resource sharing and fulfillment configurations that make the library processes possible. Working with Rapido enables you to maintain the local resource sharing configurations such as partner records and locate profiles that support managing a resource sharing process with a non-Rapido partner. If you expect to manage resource sharing transactions with non-Rapido partners, then the resource sharing configurations that are detailed in the [Configuring Resource Sharing document](#) are relevant. The following are exceptions:

- Sending Borrower Request rules (replaced by Rapido Mediation Rules)
- Additional Requested Media (Rapido uses different request forms)
- Configuring Primo Request Form Type by Genre (Rapido uses different request forms)

The following sections focus on specific configuration requirements for Rapido. More information may be found in the relevant sections of the [Customer Knowledge Center](#).

Staff Accounts

Staff users that access resource sharing task lists must have the following roles:

- Fulfillment Administrator (institution scope). This role is required to access the **Fulfillment** and the **Resource Sharing** configuration menu.
 - Fulfillment Services Manager/Operator (scope of the resource sharing library) This role is required to access the borrower and lender task lists.
 - The role must be within the scope of the resource sharing library that the user requires access to. An institution-level scope does not affect this access.
 - Only a Repository Manager role can delete a set of participating items.
-

Resource Sharing Configuration

Creating Requests for Unavailable Resources

For some institutions, in specific cases, if a resource exists, and you want to create a request for an unavailable resource, the request is still created under the pod that owns it and will be filled when the selected condition is fulfilled.

To create a hold request for unavailable resources, select:

- When Resource is Unavailable in the Current Pod — don't send the request to the next pod, keep the request with the current pod until the resource becomes available
- When Resource is Unavailable in Any of the Member Pods — check all pods to see if the resource is available at another pod

If one of the above options is selected, the request will not expire, and the library card **Estimated pick up** and **Estimated due date** are updated to: `Cannot be determined`.

The default setting is **Never**. These settings are defined at the pod level. Contact support for more information.

The screenshot shows the 'Edit Pod Member' form. The 'Create Request for Unavailable Resources' dropdown menu is open, showing two options: 'Never' and 'When Resource is Unavailable in Any of the Member Pods'. The 'When Resource is Unavailable in Any of the Member Pods' option is highlighted with a red box. Below the dropdown, there is a table for 'Pod Members' with columns for 'Institution Name', 'Members', and 'Hub Location'. The table has two rows: '1 Main Campus' and '2 Clean Training', both with 'ALL' members and 'Hub Location' checkboxes. Below the table, there is a section for 'Physical Items Lending Policies' with a table for 'Physical Lending Policy' with columns for 'Supply Term For', 'Delivery Time', 'Loan Period', 'Cost', 'Allow Renewal', 'Allow Rush', and 'Expiry Time (Days)'. The table has one row: '1 All Pod Members' with values '3', '25', '1.00 USD', a green checkmark, and a dash.

Create Request for Unavailable Resources options

Rapido Members and Resource Sharing Libraries

Use the **Resource Sharing > Configuration > Members** to configure Rapido members.

Adding a Resource Sharing Library

Rapido requires a minimum of one member to support borrower or lender requests. Multiple members are supported.

The screenshot shows the 'Resource Sharing Members' form. There is a 'Status: All' dropdown menu. Below it, there is a table for 'Resource Sharing Members' with columns for 'Active', 'Name', and 'Description'. The table has one row: '1. Ex Libris Resource Sharing Partner' with a red dot in the 'Active' column and 'Ex Libris Resource Sharing Partner' in the 'Name' column. Above the table, there is a 'Back' button and an 'Add New Member' button. A dropdown menu is open next to the 'Add New Member' button, showing two options: 'From New Resource Sharing Library' and 'From Existing Resource Sharing Library'. The 'From New Resource Sharing Library' option is highlighted with a red box.

Resource Sharing Members

When adding **From New Resource Sharing Library**, ensure **Is resource sharing library** is selected. For more information on creating libraries, see [Adding Libraries](#) and [Configuring Resource Sharing Libraries](#).

Organization details

Editing an Existing Resource Sharing Library

More than one member is used when there are multiple campuses that manage their resource sharing operations separately from one another or libraries that run their resource sharing operations independently.

Edit Resource Sharing Library

Like any library, the resource sharing library must also have a valid calendar. Note that:

- The ISO Symbol is only required if the resource sharing library is also used for resource sharing transactions with non-Rapido partners. It is not required if the resource sharing library only communicates (as a borrower or lender) with Rapido partners.

Note

The locate process related parameters are not required if the library only communicates (as a borrower or lender) with Rapido partners.

Organization Unit Details

Borrowing Locate Parameters

Borrowing Setup

Parameter	Functionality	Recommendation
Cancel request on locate failure	When a borrowing request failed to locate a partner, cancel the request.	Unselected
Automatically activate locate profile	Select Automatically activate locate profile to indicate that when a Rota assignment rule is met, a locate profile is assigned to the activated Rota based on the Rota assignment rule. (The automatic locate may be activated only if the Automatic Rota Assignment Rules is also automatically activated to attach a Rota to the request. The locate process then runs on the automatically attached Rota.)	Selected
Temporary inactive for borrowing — For advanced users.	Select Temporary inactive for borrowing when you need to block the resource sharing library from sending borrowing requests. When selected, the field Inactive dates range is displayed. This inactive status blocks borrowing requests for this library whether they are created through the UI, an API, or in Primo VE. For Primo VE users, the resource sharing request link is hidden. For Alma UI users and API processes, when requesting an item, a blocked message is displayed.	Optional setting
Default location	This is the temporary location to which designated inventory is moved for fulfilling a borrowing request.	Select the relevant location.
Default pickup location	This is the default pickup location library for resource sharing requests. If the default pickup location is left blank, the resource sharing form pickup location field is blank.	If set, the default location is displayed on the form when a patron selects pick up location.

Lending Locate Parameters

Lending Setup

Parameter	Functionality	Recommendation
<p>Automatically locate resource</p> <hr/> <p>Note</p> <p>When selected, the Reject settings can be configured.</p> <hr/>	<p>We always recommend selecting Automatically locate resource for Rapido to attempt to locate the requested resource locally.</p> <p>This enables flexibility for rejecting based on the locate results.</p>	<p>Recommended</p>
<p>Reject request when locate fails</p>	<p>This rejects a lending request when the locate did not find any matching items.</p>	<p>Can be used, but not recommended. Rapido enables you to try to locate and associate your holdings when the locate failed.</p>
<p>Reject request when no available</p>	<p><i>Reject based on real time availability:</i> Select the Reject request when no available items checkbox to reject a lending request when there are no items that are available.</p>	<p>Recommended. This will reject items that are missing or out on a loan.</p>
<p>Reject request when no requestable items</p>	<p>Select the Reject request when no requestable items checkbox to reject a lending request when there are no items that are requestable for resource sharing according to the applicable policy.</p>	<p>Recommended. This rejects requests for items that do not have the terms of use that allow for physical resource sharing associated with them.</p>
<p>Reject request when only electronic available</p>	<p>Select the Reject request when only electronic available checkbox to automatically reject items that are only available electronically. When Reject request when only electronic available is selected, set the Electronic Rejection Rules to control automatic rejection rules based on the resource's license terms.</p>	<p>Recommend only if licenses and terms are loaded and connected to the electronic inventory.</p>
<p>Ignore electronic resources</p>	<p>Select Ignore electronic resources for the locate process to only consider physical items.</p>	<p>Not recommended</p>
<p>Ignore electronic resource for physical-only requests</p>	<p>Select Ignore electronic resources for physical-only requests for the locate process to ignore all electronic items and only consider physical items.</p>	<p>Not recommended</p>

<hr/> <p>Note</p> <p>If the checkbox Ignore electronic resources for physical-only requests is unchecked, when selecting the Locate resource action, the New All titles search will still find electronic resources.</p> <hr/>		
<p>Prefer Uresolver locate results</p>	<p>Rapido can be configured to show preference for electronic format articles in the lender side locate process. If a requested article is found in electronic format, that resource is considered the only option for the lender. Other potential physical options are considered only if no electronic resources are found. This behavior is activated by the Prefer Uresolver locate results option that can be selected in the Lending Setup section of the resource sharing library.</p> <p>Electronic resources are only considered a match if their coverage matches the details of the request. This affects both the automatic and manual locate process on the lender side.</p>	<p>Recommended</p>
<p>Automatic creation</p>	<p>Select Automatic creation for the partner field to be visible on the shipping items page. For details on automatic creation of lending requests from shipping items, see Shipping Items.</p>	<p>Recommended</p>
<p>Temporary inactive for lending</p>	<p>Select Temporary inactive for lending when you need to block a library from fulfilling lending requests. When selected, the field, Inactive dates range is displayed. Select a date range to specify that the block is only applicable during the specified time period. If the date range is left empty, the library remains inactive until the Temporary inactive for lending checkbox is deselected. This inactive status blocks lending requests for this library.</p> <hr/> <p>Note</p> <p>The temporary inactive lending limit is for intervals of 30 days.</p> <hr/>	<p>Not recommended</p>
<p>Default location</p>	<p>Select the default temporary location to which designated inventory will be moved for fulfillment of the lending request.</p>	<p>Mandatory</p>
<p>Locate by fields</p>	<p>You can modify the default locate and choose the specific fields you want the locate to run by. Select Locate by Fields and choose the fields from the options displayed.</p> <p>Select Locate by Fields to filter the search in the resource sharing library. This process narrows the results available for the locate process. The page refreshes and displays the new search fields.</p>	<p>Not recommended</p>

Default printer	Verify the Default printer is set. This is used by the resource sharing library when a user performs an action that can be done while not at a desk (such as shipping). When the user is at a desk, the default printer is based on the desk.	
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When **Locate by fields** is checked, the following fields can be searched for in the resource sharing library:

- Title
- Author
- ISBN/ISSN
- OCLC Number
- Edition
- LCCN
- Other Standard ID
- Barcode
- DOI

If **Locate only** is set to **Yes**:

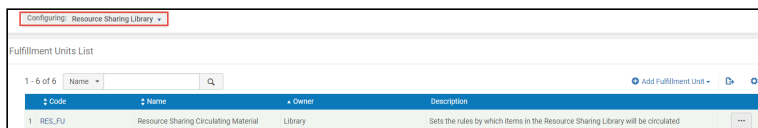
- If all fields match the field — if you want the locate to be successful only when all selected fields match.

If **Locate only** is set to **No**:

- If the request has identifiers (such as ISBN, OCLC number, or LCCN), locate is successful if any of the selected identifier fields find a match. Other fields such as Title and Author are not used for the match.
- If no identifier fields exist on the request, locate is only successful if all the other selected fields match.

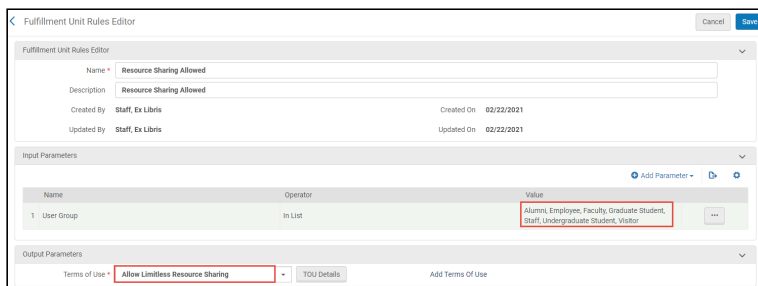
Fulfillment Unit and Terms of Use

Borrowing resource sharing libraries must have a library Fulfillment Unit (**Configuration > Fulfillment > Physical Fulfillment > Fulfillment Units**).



Fulfillment libraries

Resource Sharing Allowed must be enabled in the **Fulfillment Unit Rules** tab.



Fulfillment Rules

The rules determine:

- Resource sharing eligibility

- Request limits
- Allow pickup locations
- Fees
- Personal delivery

← Terms of Use Confirmation

	Policy Type	Policy Name	Policy Description
1	Allow Resource Sharing Requesting	Resource Sharing Allowed	Allow resource sharing requests
2	Resource Sharing Receive Fee	No Resource Sharing Fee	No fee for resource sharing requests
3	Resource Sharing Request Fee	No Resource Sharing Request Fee	No request fee for resource sharing request
4	Renew Fee	No Renewal Fee	Default No Renewal Fee
5	Active resource sharing requests limit	No Resource Sharing Limit	No resource sharing limit
6	Yearly resource sharing requests limit	No Yearly Resource Sharing Requests Limit	No Yearly Resource Sharing Requests Limit
7	Pickup Locations	Anywhere	Default value for Pickup - Anywhere
8	Personal delivery	Personal Delivery - Home	Deliver items only to a home address
9	Personal delivery fee	Personal Delivery Fee - No Fee	Personal delivery is not charged with a fee

Sample Terms of Use (TOU) that allows unlimited resource sharing

For more information, see [Supporting Personal Delivery for Requests](#).

Automatic Jobs for Renewals and Expired Requests

When the **Expired Resource Sharing Requests** job (**Configuration > Fulfillment > General > Fulfillment Job Configuration**) is set to **Active**, expired requests are automatically rejected. The default setting for this job is **Inactive**.

Expired Resource Sharing Requests

Status Active Inactive

Schedule ▼

Expired Resource Sharing Requests Job

For pods that allow automatic renewals, when the **Send Courtesy Notices and Handle Loan Renewals Job** (**Configuration > Fulfillment > General > Fulfillment Job Configuration**) is set to **Active** and **Allow Renew for Rapido Pods Requests** is checked, expiring resource sharing requests are automatically renewed. The default setting for this job is **Inactive**.

Note

AutoRenewal (**Fulfillment > Auto Loan Renewal Rules**) must be set to `True`. in the Automatic Loan Renewal Rule Editor.

Send Courtesy Notices and Handle Loan Renewals Job

Associating Pickup Locations with Resource Sharing Members

This feature enables the borrowing experience for libraries with multiple resource sharing libraries to be more efficient. By selecting **Add Definition** ([Configuration > Resource Sharing > Configuration > Associate Pickup Location with RS Member](#)) and adding a **Pickup Location** and **RS Member**, borrowing requests are handled by the closest or most convenient library.

Note

The `ill_item_creation_lib_code` ([Configuration > Fulfillment > General > Other Settings](#)) must be set to **ALL** and the `ill_item_creation_loc_code` ([Configuration > Fulfillment > General > Other Settings](#)) must be empty for the associate pickup location with resource sharing member functionality to work.

Associate Pickup Location with RS Member configuration

Note

- If the pickup location does not belong to a library that serves as the resource sharing library, and the pickup location is not defined, the library is selected randomly.
- If the pickup location is attached to a member, but the member is not part of the pod or Rota from where the request received the offer, the owning library is not the member defined in the configuration. The owning library is the member that was assigned when getting the Rapido offer.
- When converting a borrowing request type, if the owner library is changed, and a value is set for the `rapido_default_digital_request_owner` ([Configuration > Resource Sharing > General > Other Settings](#)) parameter (empty by default), that value is added to the **Requested Pickup Location**.

Configuring Locate Profiles

When configured ([Configuration > Fulfillment > Resource Sharing > Locate Profiles](#)), a locate profile defines how you search the resource sharing partner's catalog. After configuring a locate profile, you associate the profile with a partner. For more information, see [Locating Items](#).

Item Policy

Since requests do not receive terms from the pods, you can enable libraries to apply loan TOUs that match the loan and renewal period arrangements made with each partner. For example, when borrowing, the library may want to have item

policies created for abiding by the partner terms. A library may create and use separate item policies for a 10-week loan partner, and a 20-week loan partner.

Item policies are required for Rapido and Alma peer-to-peer but are not required for Rapido libraries in hybrid pods.

Creating Temporary Item Rules

These rules add the appropriate item policy to the borrowing items based on the partner that filled the request. This is required for Rapido and Alma for straight p2p.

Loan TOU and Loan Fulfillment Rules

The loan fulfillment unit rules apply the appropriate loan TOUs to borrowed items based on the item policy added to the borrowing item by our temporary item creation rules.

This is required for Rapido and Alma for straight p2p. It may not be configured if a library was not previously configured for Alma resource sharing.

Configuring Lending Terms (Without a Pod)

Lending Resource Sharing TOU and Lending Fulfillment Unit Rules

The lending resource sharing fulfillment unit rules apply the appropriate lending resource sharing TOU based on the resource sharing partner the lending request was received from. This is required for Rapido and Alma libraries for peer-to-peer connection.

Configuring Rota Templates

Using partners without using a pod can be managed in multiple ways.

When you create a borrowing request, you can manually assign one or more partners to the request, either directly and/or using one or more rotas.

A rota is a list of partners queried to see if they can fill a particular resource sharing borrowing request. A rota can be ordered, where the partners are queried in a specific order, or at random. You can have multiple rotas, each defined by a rota template.

To use create a rota template:

1. From **Fulfillment > Resource Sharing > Rota Templates**, select **Add Template**.
2. From the General Information tab, enter a **Code** and a **Name** for the rota.
3. Select if the rota **Type** should be **Ordered** or **Non Ordered**.
4. Select if the rota **Status** should be **Active** or **Inactive**.
5. If relevant, select the **Locally Managed Rapido Pod** checkbox. The pod can then be managed in the pod priority list.
6. Select **Save and add members**. The rota template is added.

Rota template form

Configuring Rota Assignment Rules

Rota assignment rules determine the conditions under which rota templates are invoked.

Configure rota assignment rules on the Rota Assignment Rules List page ([Configuration > Fulfillment > Resource Sharing > Rota Assignment Rules](#)).

If a rota is not added as a Rapido local pod, Rapido uses the Rota assignment rules to determine which rota to assign the request based on the Rota assignment rules.

Rota is also assigned automatically if it matches a rota assignment rule. The rota is used as a list of targets to request from, one at a time. Different rotas can be used for different purposes. For example, an institution may set up a **quick to respond** rota, an **expensive but likely to fill** rota, or an **e-material experts** rota.

A rota of partners can be combined within your Rapido pods and can also be used as a last resort; for the latter, you need to configure the rota assignment rules which define when to apply this rota. See [Configuring Rota Templates](#).

You can then manage the rota under the **Pod Priority** table ([Configuration > Resource Sharing > Configuration > Member > Borrowing Policies](#)).

Pod Name	Locally Managed Pod	Cost to Patron
1. California State Network		No cost assigned
2. US West		No cost assigned
3. US pod		No cost assigned
4. CSUSUNW Pod		No cost assigned

Pod Priority

Defining a Default Level of Service

The Level of Service is included in the lending request data slip and in the email request sent by the borrower to an email partner. You need to select a default, as there is no default level of service that is defined out-of-the-box. ([Configuration > Fulfillment > Resource Sharing > Levels of Service](#))

The **Level Of Service** information can also be sent from the request forms.

Note

This feature is only relevant for lender-only institutions.

Level Of Service options

When **LEVEL_OF_SERVICE_PHYSICAL** or **LEVEL_OF_SERVICE_DIGITAL** ([Configuration > Resource Sharing > Request Forms > Rapido Request Forms Customization](#)) codes are enabled (disabled by default), the values set in the Level of Service table ([Configuration > Fulfillment > Resource Sharing > Levels of Service](#)) are displayed on the request form. Additionally, library staff can select a **Default Value** for the Level of Service.

Enabled	Code	Description	Translation	Default Value	Updated By	Last updated	
<input checked="" type="checkbox"/>	WHEN_CONVENIENT	When Convenient	When Convenient	<input type="radio"/>	-	-	...
<input checked="" type="checkbox"/>	NORMAL_LOCAL	Normal (Local)	Normal (Local)	<input type="radio"/>	-	-	...
<input checked="" type="checkbox"/>	NORMAL_FULL	Normal (Full)	Normal (Full)	<input type="radio"/>	-	-	...
<input checked="" type="checkbox"/>	PRIORITY_LOCAL	Priority (Local)	Priority (Local)	<input type="radio"/>	-	-	...
<input checked="" type="checkbox"/>	PRIORITY_EXTENDED	Priority (Extended)	Priority (Extended)	<input type="radio"/>	-	-	...
<input checked="" type="checkbox"/>	RUSH_LOCAL	Rush (Local)	Rush (Local)	<input type="radio"/>	-	-	...
<input checked="" type="checkbox"/>	RUSH_EXTENDED	Rush (Extended)	Rush (Extended)	<input type="radio"/>	-	-	...
<input checked="" type="checkbox"/>	EXPRESS_LOCAL	Express (Local)	Express (Local)	<input type="radio"/>	-	-	...
<input checked="" type="checkbox"/>	EXPRESS	Express (Australia)	Express (Australia)	<input type="radio"/>	-	-	...
<input type="checkbox"/>	NORMAL	Normal	Normal	<input type="radio"/>	-	-	...
<input type="checkbox"/>	RUSH	Rush (Australia)	Rush (Australia)	<input type="radio"/>	-	-	...
<input type="checkbox"/>	SECONDARY_MAIL	SecondaryMail	SecondaryMail	<input type="radio"/>	-	-	...
<input type="checkbox"/>	STANDARD	Standard (Australia)	Standard (Australia)	<input type="radio"/>	-	-	...
<input type="checkbox"/>	URGENT	Urgent	Urgent	<input type="radio"/>	-	-	...

Level of Service codes

The **Level of Service** information appears on the right pane in the **Request information**.

Request information Level of service

Integrating with Z39.50

Z39.50 integration must be configured and active for exposing the library's holdings availability to the other members of the resource sharing network.

From the Integration Profile List page ([Configuration > General > External Systems > Integration Profiles](#)), select **Add**

Integration Profile. The first page of the integration profile wizard appears.

From the **Integration type** drop-down list, select **Z39.50 Server**.

For more information, see [Z39.50 integration](#).

Configuring Workflow Profiles

Resource sharing workflows may include many steps, not all of which are required by your library. For example, some libraries do not allow recalls, or some libraries do not allow renewal requests.

Workflow Profiles enable you to configure the resource sharing steps that are allowed for library-managed workflows.

To create borrowing and lending workflow profiles:

1. Select **Configuration > Fulfillment > Resource Sharing > Workflow Profiles**.
2. Select **Add Workflow Profile**.
3. Create a workflow profile for borrowing and a workflow profile for lending.

The screenshot shows the 'Add Workflow Profile' form. It features a 'Workflow Profile *' input field and a 'Type' dropdown menu with a search icon and the text 'Look-up or select'. Below these are two columns of checkboxes under the heading 'Steps *'. The first column contains 11 checkboxes for various workflow steps, and the second column contains 10 checkboxes for other steps. At the bottom right, there are three buttons: 'Add', 'Close', and 'Add and Close'.

Add Workflow Profile

Workflow Profiles are then linked to Partner records and define how the workflows are managed when that partner is a peer partner.

For more information, see [Workflow Profiles](#).

Configuring Borrowing Policies Based on Lenders Terms (Without a Pod)

Configuring RapidILL as a Resource Sharing Partner

Configure RapidILL as a resource sharing partner from the Resource Sharing Partner page (**Fulfillment > Resource Sharing > Partners > Add a Partner**).

For the **Profile Type** and **System Type**, select **RapidILL**. Enter the form details as described at [Resource Sharing Partners](#).

Resource Sharing Partners

On the **Parameters** tab, for the **Default Library Owner**, select the library to be used when creating lending requests. Lending requests received from RapidILL are created in the Resource Sharing Library that you select. Enter the form details on the **Parameters** tab as described at [RapidILL Parameters](#).

Parameters

If you are using the RapidR integration, select **Enable Rapid Returnables Integration For Rapido**. This enables you to manage borrowing and lending requests from your RapidoR network via Rapido. By selecting this checkbox, a Rapid Returnables pod is added to your list of participating Pods, and you need to define its priority on the Borrowing Policies tab of the resource sharing member.

Uploading holdings from Alma to RapidILL is an automated process using OAI - Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH). To find out more about the OAI protocol, you can read the [OAI page in our developer network](#). After the initial set up, RapidILL holdings are updated automatically with the latest Alma data without any human intervention.

Setting Up Rapid

RapidILL Defining Sets

An automated job publishes an automatically updated set of titles through the OAI protocol weekly. This set is enriched with item information so that RapidILL has all the details it needs.

RapidILL automatically pulls this data once a week and processes it into RapidILL holdings. RapidILL uses these holdings to determine which requests you receive, and what you own locally.

Each title contains holdings with five key details:

- Title
- ISBN/ISSN/OCLC number
- Location/Collection
- Call Number/URL
- Years/Volumes (journals only)

Rapid OAI Holdings

Setting up the OAI integration requires a General Administrator role.


```

<xsl:if test="notification_data/request/assigned_unit_name != ''">
<tr> <td>@@following_item_requested_on@@ <xsl:value-of select="notification_data/
request/create_date"/>, @@can_picked_at@@ <xsl:value-of select="notification_data/
request/assigned_unit_name"/> @@circulation_desk@@.</td>
</tr>
</xsl:if>
<xsl:if test="notification_data/request/assigned_unit_name = ''">
<tr> <td>@@following_item_requested_on@@ <xsl:value-of select="notification_data/
request/create_date"/>, @@can_picked_at@@ {ENTER THE NAME OF THE RESOURCE SHARING
CIRCULATION DESK HERE} @@circulation_desk@@.</td>
</tr>
</xsl:if>

```

Resource Sharing Between Libraries in the Same Alma Institution

Rapido supports performing resource sharing between libraries in the same institution. This is not a common scenario, and you need to open a support ticket to enable it.

Below are the requirements for this to be enabled:

- The libraries in the institution (IZ) do not do a pick from shelf from other libraries. Each library serves its own patrons.
- Contact support to create the relevant POD to include the libraries in the institution and to enable this specific configuration (**ngrs_allow_iz_rs** parameter must be set to `True`).
- Each member in the library must associate participating items with the POD and the pod must be set in the correct pod priority order for borrowing priorities.

Data Sharing Profile

To enable resource sharing shareholding information, you must have a General System Administrator role.

The **Data Sharing Profile** (**Configuration > General > General Configuration > Data Sharing Profile**) option enables institutions to share holding information for resource sharing purposes. When set to **Yes**, this indicates that the institution has agreed to share its information. The default setting for this option is **No**. We strongly recommend setting this option to **Yes**.

Data Sharing Profile

RESOURCE SHARING

Confirm making holdings information of my institution searchable and visible to other Alma and Rapido institutions for purposes of availability and requestability of items for resource sharing. This could provide an opportunity for your institution to establish new resource sharing partnerships and networks with other institutions that agree to do so. Allowing your institution's holdings information to be shared for this purpose does not mean that your institution is required to allow resource sharing with any other institutions. None of your users' personal data is used. *

Yes No

Data Resource Sharing Profile Configuration

For more information, see [Data Sharing FAQs](#).

Configuring Rapido Jobs

Rapido jobs are configured from [Configuration > Resource Sharing > General > Rapido Jobs Configuration](#). The following Rapido jobs are available for configuration:

Rapido Jobs

Job Name	Description	Default
Automatically Ship Rapido Digital Requests	Automatic delivery of batch digital lending requests from a configured folder.	Inactive
Send Invoice to Partner	Enables lending institutions to send invoices directly to borrowers for requests that include fees.	Inactive
Load ILL ProQuest eBook List	Sets resources with a title_status of <i>enabled</i> to EILL Eligible on the electronic portfolio. Resources with a title_status removes the ILL policy from the electronic portfolio.	Inactive
Complete eBook Requests	Runs daily to check which eBook requests are expired. Expired requests are then set as returned to the lender, the lender is notified that the resource was returned, and the request status updates to Request completed .	Inactive

General Other Settings

Configuring Transit Time Rules

To configure transit-time rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

New for February! Transit-time rules enable Rapido to calculate expected delivery times for fulfillment requests. When an item request is received, the fulfillment transit-time rules are checked to determine the expected transit time based on the location of the item requested, the pickup location and, in some cases, the material type of the item (for example, moving an oversized item from one library to another may take longer than moving an average-sized item). Rapido uses the transit-time rules to find the copy of the requested item that can be expected to arrive at the required pickup location the soonest.

There is a default transit-time rule that defines the delivery time when none of the transit-time rules are met. This default rule can be modified; however, it is set to a 12-hour delivery time by default. When you define a new transit-time rule, you can test the rule by calculating the estimated time of arrival (ETA) for a scenario in which the rule is applied. For details, see [Calculating the Estimated Time of Arrival for a Resource](#) below.

Each transit-time rule can be either enabled or disabled. By default, each new rule is enabled.

You configure transit-time rules from the Transit Time Rules page ([Configuration Menu > Fulfillment > Library Management > Transit Time](#)).

The screenshot shows the 'Transit Time Rules' interface. At the top, there are tabs for 'Rules' and 'Notes'. Below is a section for 'Institution Rules List' with a 'Calculate ETA' button and an 'Add Rule' button. A filter dropdown is set to 'All'. The main table lists six rules with columns for 'Enabled', 'Move Up', 'Move Down', 'Rule Name', 'Description', 'Updated By', and 'Update Date'. The rules are:

Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date
<input checked="" type="checkbox"/>			Educ-Mat		Jim Benson	11/19/2014
<input checked="" type="checkbox"/>	⬆	⬇	Education to Music		Chris Parson	10/17/2011
<input checked="" type="checkbox"/>	⬆	⬇	Music to All		Chris Parson	01/15/2012
<input checked="" type="checkbox"/>	⬆	⬇	Law to Any		Chris Parson	01/15/2012
<input checked="" type="checkbox"/>	⬆	⬇	Science to All		Super User	01/15/2012
<input checked="" type="checkbox"/>	⬆	⬇	Main-Science		Super User	04/02/2012

Below the list is a 'Default Rule' section with a table:

Rule Name	Description	Updated By	Update Date
1 Default Transit Time	Default time of transit 12hours		

Transit Time Rules Page

Note

Transit-time rules can be configured at the institution level only. Select the required institution from the **Configuring** filter on the Fulfillment Configuration page.

The following actions can be performed on this page:

- Adding a transit-time rule (see [Adding a Transit Time Rule](#))
- Editing a transit-time rule (select **Edit** from the row actions list)
- Deleting a transit-time rule (select **Delete** from the row actions list)
- Editing the default transit-time rule (select **Edit** from the row actions list for the default rule)
- Enabling or disabling the transit-time rule
- Moving transit-time rules up or down in order of preference. The order of the rules within the list of rules is significant because Rapido applies the first (enabled) rule whose input parameters are satisfied.
- Calculating the ETA for a Resource (see [Calculating the Estimated Time of Arrival For a Resource](#))

Adding a Transit Time Rule

You can add a new transit-time rule, which can be either enabled or disabled. By default, each new rule is enabled.

The calculated delivery time gives an estimate of when a requested item arrives at the pickup location. This estimate can affect how and when the service is provided to the requesting patron. In some cases, the patron may not be interested in the service after a particular time or date. In such a case, longer delivery times can eliminate certain fulfillment options altogether.

The material type of the physical item requested and the source (**From**) location of an item can also limit the fulfillment scenarios available for a given request, as they, too, may affect the speed of the transfer.

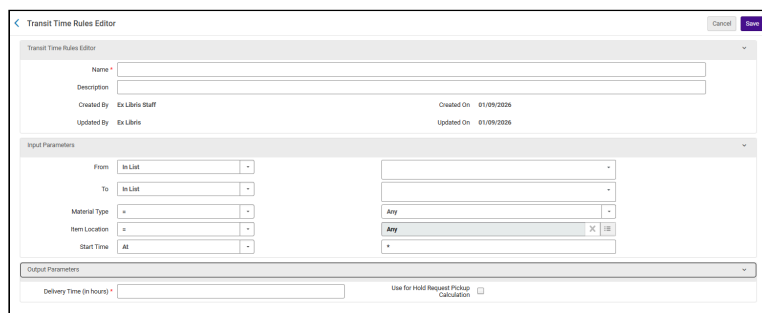
To add a transit-time rule:

1. On the Transit Time Rules page (**Configuration Menu > Fulfillment > Library Management > Transit Time**), select **Add Rule**. The Transit Time Rules Editor page appears.

Note

If you want to create a copy of an existing transit-time rule, select **Duplicate** from the row actions menu. Once

you have copied the rule, you can modify it as needed.



Transit Time Rules Editor Page

2. In the **Transit Times Rules Editor** section, specify a name (required) and description (optional) for the new rule.
3. In the **Input Parameters** section, specify an operator and enter values for the following parameters:
 - **From** – The source organization unit—that is, the library or institution from which the item is transferred. You can add several source organization units to be included in the rule by pressing **Ctrl** on your keyboard while selecting the relevant values.
 - **To** – The destination—that is, the library to which the item is delivered. The **To** drop-down list includes only those libraries that have a **Deliver to** relationship with the source location. You can add several destinations to be included in the rule by pressing **Ctrl** on your keyboard while selecting the relevant values.
 - **Material type** – Select the type of item that is to be delivered.
 - **Item location** – Select the physical location inside the source location from which the item is transferred.
 - **Start time** – Enter the time of day at which items are dispatched from the source location to the specified destination. For example, if it takes longer to move around items in the morning than in the afternoon, then you can have a rule with ‘Start Time After 12:00’ and another with ‘Start Time Before 12:00’.

Note

Unlike an item that has been scanned in and therefore has a known hour at which it has been put in transit, there is no known scan-in time that the system can use to calculate the closest item for fulfilling a request. Therefore, when the system calculates the closest copy that can be used to fulfill a request (see [Pickup at Shelf](#)) it uses a rule with no start time, i.e. the Start Time is set to ‘At *’.

4. In the **Output Parameters** section:
 - **Delivery time (in hours)** - Time that it takes to deliver the item when the specified input parameters are fulfilled.
 - **Use for Hold Request Pickup Calculation** — Select this checkbox for the rule to be considered for selecting the best copy to fulfill a request. The checkbox is displayed only when the **From** and **To** library fields are configured, and the **Material Type** field is set to **Any**. By default, the checkbox is not selected. (New for February!) When this checkbox is selected, the **Do not use for Transit Time Calculation** checkbox appears. Selecting this checkbox has the following implications:
 - The rule is only used for calculating the selected item for fulfilling the request, and not for calculating an estimate of when a requested item arrives at the pickup location
 - The **From** field is configurable at the location level.

- When a hold request is created, and the resource to fulfill the request is not available in the selected pickup location, Rapido matches resources to the request using additional parameters, as follows:
 - Rapido attempts to locate resources belonging to another library on the same campus as the pickup location.
 - If no resources are found on the same campus, multiple resources exist in different locations on the campus, or no campuses have been defined, Rapido checks the Transit Time Rules for which the Use for Hold Request Pickup Calculation checkbox has been selected. If a rule exists for this resource and the **Use for Hold Request Pickup Calculation** checkbox is selected, Rapido chooses this resource.
 - If multiple resources have a transit-time rule, then the resource with the shortest transit time is selected.

Note

From and **To** libraries are the only input parameters in the transit-time rule that are considered for the location calculation.

5. Select **Save**. The rule you defined is listed at the bottom of the list of rules on the Transit Times Rules page.

Calculating the Estimated Time of Arrival for a Resource

You can calculate the ETA of a resource that is to be transferred from one location to another. The ETA indicates the number of hours it takes for the resource to arrive at the destination location, based on the transit-time rules defined for the source and destination locations. If none of the defined transit-time rules are satisfied, the default transit-time rule is applied. Calculating the ETA is useful in testing the rules that have been defined.

To calculate the estimated time of arrival for a resource:

1. On the Transit Time Rules page ([Configuration Menu > Fulfillment > Library Management > Transit Time](#)), select **Calculate ETA**. The Calculate ETA page appears.

Calculate ETA Page

2. In the **Transit Time - Input** section, enter the input parameters for the calculation. See step 3 in [Adding a Transit Time Rule](#) for details on the input parameters.
3. Select **Calculate ETA**. The calculated ETA is displayed in the **Delivery time** field.

Resource Sharing - Other Settings

Set the [Configuration > Resource Sharing > General > Other Settings](#) menu as follows:

Other Settings

Parameter	Default	Description
rapido_allow_physical_request_for_eBook	true	<p>When set to <code>true</code> (default), and an eBook holding is available, the user is presented with three tiles and can choose from the digital offer, physical offer, and eBook offer.</p> <p>When set to <code>false</code>, the patron is presented with either an eBook or physical offer based on availability from the highest priority pod. Pod priority is determined by your configuration (Configuration > Resource Sharing > Members > Borrowing Policies)</p>
rapido_automatically_create_partner	false	Whether or not to allow partners to be created automatically.
rapido_default_digital_request_owner	blank	Defines the resource sharing library for digital requests.
rapido_do_not_send_request_when_locate_fails	true	When set to <code>true</code> , requests are prevented from being sent to a lender when a locate failed due to a technical problem. See Locate Failed .
rapido_hide_how_to_get_it_section	false	When set to <code>true</code> , this parameter hides the How to get it section in Primo VE. See Hiding How to Get It .
rapido_hold_shelf_expiration	due_date	<p>This parameter determines how Rapido calculates the hold shelf expiration for borrowing requests.</p> <ul style="list-style-type: none"> <code>due_date</code> — the time is derived from the request due date. <code>circ_desk</code> — the time is derived from the circulation desk hold shelf configuration. <p>See Shelf Expiration.</p>
rapido_lender_supply_directly_to_patron	false	This functionality is only for institutions with shared users.
rapido_rs_barcode_for_same_inst	false	<p>When set to <code>true</code>, this functionality enables the lender to share barcodes with the borrower for Rapido requests.</p> <p>This parameter must be enabled by both the borrower and the lender institution.</p>

Parameter	Default	Description
requests_ prefix		
rapido_show_ copyright_on_ iso	false	<p>Controls whether the copyright rules are calculated for borrowing requests and visible in the ISO message accordingly for Rapido customers.</p> <hr/> <p>Note</p> <p>The Resource Sharing Copyright Statuses only appears in Configuration > Fulfillment > Copyright Management > Resource Sharing Copyright Status if the parameter rapido_show_copyright_on_iso is set to <code>true</code> (default <code>false</code>) and rs_borrower_copyright_management parameter (Fulfillment > General > Other Settings) is set to <code>true</code>.</p> <p>These parameters define whether or not the resource sharing borrower supports copyright management.</p> <hr/>
rs_use_ partner_ currency	false	<p>If it is set to <code>true</code> and the request cost field is populated, the currency value changes to reflect the value of the currency defined on the General Information tab of the partner (Fulfillment > Resource Sharing > Partners).</p> <p>See, Currency Handling.</p>
rapido_show_ physical_ journal_offer	false	<p>When set to <code>true</code>, Rapido physical journal requests are available.</p>
rapido_show_ rapid_partner	true	<p>When set to <code>true</code>, Rapid partners are displayed in the task list.</p>
rapido_ summary_ holding_ delimiters	;	<p>The Rapido summary holding delimiter(s). See Multi-Volume Settings.</p>
rapido_use_ tou_for_lost_ item	false	<p>When set to <code>true</code>, the library loan terms of use (ToU) are applied to lost items. See Lost Fees.</p>
request_ note_to_ lender	true	<p>When set to <code>true</code>, notes can be sent to the lender from the request. For more information, see Sending Notes.</p>

Parameter	Default	Description
		<hr/> <p>Note</p> <p>This parameter is not relevant for RapidILL requests.</p> <hr/>
rs_hide_pickup_location_for_digital	false	When set to <code>false</code> , the pickup location is displayed for digital formats in the resource sharing form.
rs_default_pickup_location_when_hide		Sets the default pickup location when the pickup location field is hidden in the digital resource sharing form.

Fulfillment - Other Settings

Set the **Configuration > Fulfillment > General > Other Settings** menu as follows:

The `ill_item_creation_lib_code` parameter can be used to assign a default library. If this is configured, then the user record does not have to be updated with a resource sharing library.

Other Settings

Parameter	Default	Description
check_patron_duplicate_borrowing_requests	false	Determines whether to perform additional check for patrons with similar existing and active borrowing requests. When set to <code>true</code> , this prevents patrons from requesting a resource that they already have an active request for.
check_self_ownership_serial	false	Whether to check self ownership for serial titles. For more information, see Self Ownership Check .
rs_default_digitization_department	blank	This is the digitization department that is assigned automatically created digitization requests if the <code>rs_auto_request_lending</code> parameter is on.
rs_disable_borrowing_auto_assign	true	When set to <code>false</code> , this setting assigns borrowing requests to a specified staff member for updating.

Parameter	Default	Description
rs_disable_lending_auto_assign	false	This auto-assigns lending requests to the staff member that updates them.
rs_keep_expired_request_active	false	When set to <code>true</code> , Expired requests are editable, request actions are available, and partners can be added manually.
rs_keep_rejected_request_active	blank	<p>This determines your policy regarding requests that have been rejected by the lender. Use this parameter to determine whether the borrowing or lending requests should remain active when rejected and should continue being processed as an active request, for example in order to process with a broker system.</p> <p>Possible values:</p> <ul style="list-style-type: none"> • None — This is the default setting. The request is completed and is no longer included in the active requests queue. • Borrowing, Lending, Both — The request remains in the active requests queue of the appropriate task list, so the staff has the option to work on the request. <hr/> <p>Note</p> <p>When the parameter is set to <code>true</code> (default <code>false</code>), Expired requests are editable and partners can be added manually.</p> <hr/>
rs_no_authentication_document_delivery	false	When set to <code>true</code> , the linked content can be accessed without authentication. In default letters, the link is included in the Document Delivery Notification Letter and does not require user authentication when opening the link.
rs_use_addressfrom_letter_param	false	Enable resource sharing letters to use the From address in the letter configuration. For more information, see Changing the From Email Address .

Additional Parameters

Configure the following parameters located at **Configuration > Fulfillment > General > Other Settings** as follows:

Additional Configuration

Parameter	Default	Description
rs_keep_rejected_request_active	Borrowing	Keep rejected resource sharing requests active as a borrowing request to keep it open if it is rejected by RapidILL
borrower_document_delivery_maximum_views	2	The maximum number of times patrons can access the link for RapidILL document delivery.
document_delivery_cleanup_days	Default:	The number of days after which the digital file is deleted.

Parameter	Default	Description
	30 Maximum: 90	

Lost Fees

When the parameter **rapido_use_tou_for_lost_item** ([Configuration > Resource Sharing > General > Other Settings](#)) is set to `true` (default `false`), a **Lost Item Fine** is automatically added to the patron's account in addition to the **Lost Item Replacement Fee** when an item is marked as lost or when the number of lost profile days have passed, based on the borrowing library's settings in the library loan Terms of Use (TOU) ([Configuration > Fulfillment > Physical Fulfillment > Terms of Use and Policies](#)).

Policy Type	Policy Name
1	Is Loanable
2	Is Recalable
3	Due Date
4	Requested Item Due Date
5	Recall Period
6	Renew Fee
7	Lost Item Fine
8	Lost Item Replacement Fee
9	Lost Item Replacement Fee Refund Ratio
10	Maximum Fine

Lost Fees Terms of Use

Locate Failed

When a locate process fails for technical reasons such as missing credentials or communication issues, set **rapido_do_not_send_request_when_locate_fails** ([Configuration > Resource Sharing > General > Other Settings](#)) parameter to `true` (default) to send the request to the next lender in the rota. Set the parameter to `false` to send the request to the lender whose locate request failed.

Multi-Volume Settings

Rapido uses the summary holding delimiter set in Alma to read the summary holdings (currently only available for mediation rules).

For matches based on the summary holdings, Rapido uses a semicolon (;) as the default delimiter. To set the delimiter you want to use, you can use the new **rapido_summary_holdings_delimiters** ([Configuration > Resource Sharing > General > Other Settings](#)) parameter. The parameter value can be any delimiter that you use for your summary holdings.

If the summary holdings is empty, Rapido searches the item information.

Matches are made based on mediation rules such as for **Fill Locally** and the **Self Owned** and/or **Available** options.

parameter key	parameter module	parameter value	free text description	updated by	Last Updated
1	rapido_dis_not_send_request_when_locate_is	true	Set to true to prevent requests from	esLmpf	14/Apr/2022
2	rapido_hide_how_to_get_it_section	true	Hides how to get it section in preview	esLmpf	05/Dec/2021
3	rapido_hold_shelf_expiration	due_date	Parameter to determine how Rapido	-	-
4	rapido_lender_supply_directly_to_patron	true	This functionality is only for instituti	esLmpf	14/Feb/2022
5	rapido_resource_sharing_bar	false	Enable Rapido resource sharing bar	-	-
6	rapido_summary_holding_delimiters	:	Rapido summary holding delimiters	-	-
7	request_note_to_lender	true	Send note to lender	-	-

rapido_summary_holding_delimiters

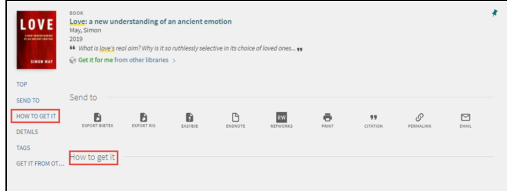
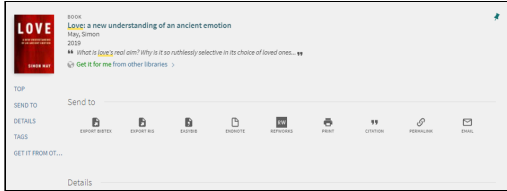
Note

This function is currently only available for mediation rules.

For more information, see [Multi-Volume Resource Sharing Workflow](#).

Hiding How to Get It

Rapido enables you to hide the **HOW TO GET IT** section so that if this feature is not used by your institution, you can remove it. To hide this section, from **Configuration > Resource Sharing > General > Other Settings** set **rapido_hide_how_to_get_it_section** to `true`. By default, this setting is set to `false`.

	
<p>Show HOW TO GET IT</p>	<p>Hide HOW TO GET IT</p>

Shelf Expiration

To prevent items from sitting on hold shelves for extended periods of time, Rapido enables you to configure if the **Maximum time on hold shelf (Days)** (**Configuration > Fulfillment > Library Management > Circulation Desk > Hold Shelf Information**) for an item to remain on a hold shelf before being returned to the lending library should be based on the request Due Date or the Circulation Desk Hold Shelf Expiration Time. Set the parameter **rapido_hold_shelf_expiration** (**Configuration > Resource Sharing > General > Other Settings**) to either **due_date** (default) or **circ_desk**.

Note

If **Maximum time on hold shelf (Days)** is not defined, Rapido uses the request **Due date**.

Note

If **rapido_hold_shelf_expiration** is set to **circ_desk**, the hold shelf period in the request TOU for the RS fulfillment unit must also be configured.

Self Ownership Check

The **check_self_ownership_serial** parameter ([Configuration > Fulfillment > General > Other Settings](#)) determines whether requesting is allowed for articles without checking local ownership.

Set this to `false` so that article requesting is always allowed without checking the local physical inventory first.

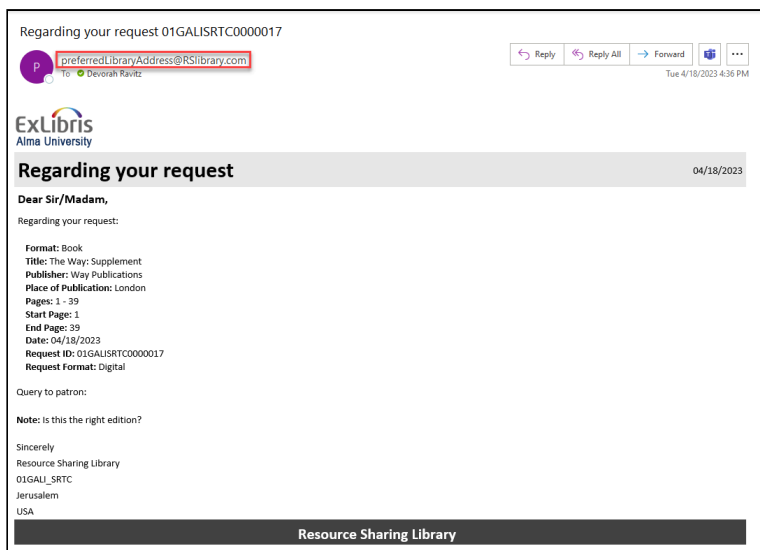
Alma cannot determine whether the exact coverage of the requested article is in your physical holdings. Therefore, setting this parameter to `false` allows the patron to request the article. We recommend mediating these requests in order to first verify local availability using the Self Ownership parameter of the mediation rules.

Changing the From Email Address

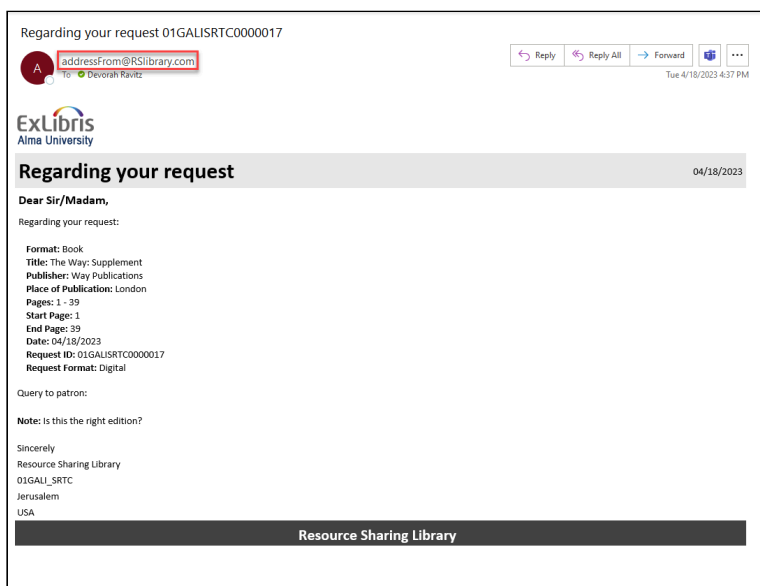
You can set the default sent from email address to be different from the main library email address. When **rs_use_addressfrom_letter_param** ([Configuration > Fulfillment > General > Other Settings](#)) is set to `true` (default `false`), instead of letters being sent from the **Preferred Email Address** set in [Configuration > General > Libraries > Add a Library or Edit Library Information > Contact Information tab > Add Address/Edit](#) an existing address, the email is sent from the letter configuration **addressFrom** ([Configuration > General > Letters > Letters Configuration](#)) on the following letters:

- Borrower Claim Email Letter
- Borrower Overdue Email Letter
- Borrower Receive Email Letter
- Borrower Return Email Letter
- Externally Obtained Letter
- Ful Cancel Email Letter
- Ful Damaged Email Letter
- Ful Incoming Slip Letter
- Ful Lost Email Letter
- Ful Outgoing Email Letter
- Ful Renew Email Letter
- Lender Checked-in Email Letter
- Lending Recall Email Letter
- Lender Reject Email Letter
- Lender Response Email Letter
- Lender Ship Email Letter
- Lender Will Supply Email Letter
- Query To Patron Letter
- Rapido member letter

- Resource Sharing Request Confirmation Letter
- Resource Sharing Return Slip Letter
- Resource Sharing Shipping Slip Letter



Preferred email address



addressFrom email address

In addition, for the following three letters, `signature_email` needs to be replaced in the XSL with `address_from` in order to prevent the preferred email address from appearing at the bottom of the email:

- Externally Obtained Letter
- Query To Patron Letter
- Rapido member letter

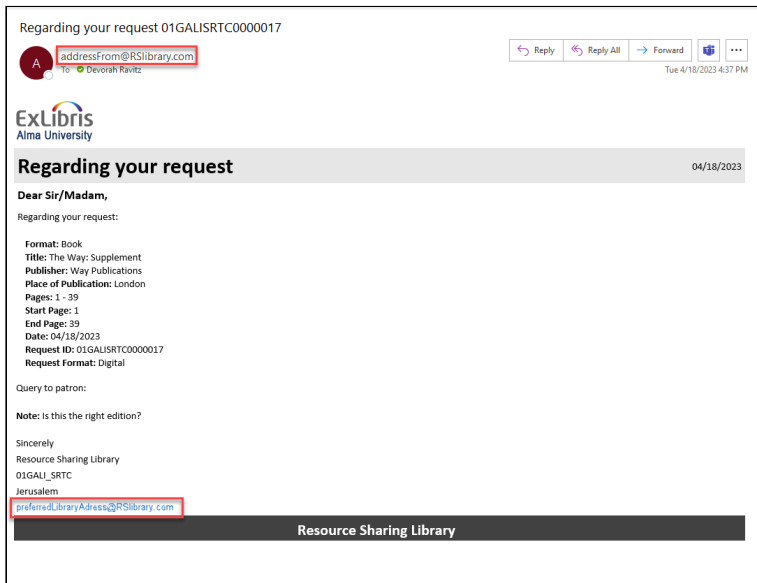
```

<xsl:if test="notification_data/signature_email != "">
<tr>
<td>
<xsl:value-of select="notification_data/signature_email" />
</td>
</tr>

</xsl:if>

```

XSL



Preferred email address on three letters

For more information, see [Configuring Rapido Letters](#)

Sending Notes

When **request_note_to_lender** (**Configuration > Resource Sharing > General > Other Settings**) is set to `true` (default), notes are sent to both the borrowing and lending institutions. When set to `false`, notes are only sent to the borrowing institution.

Note

This parameter is not in use for RapidILL. The note will not be included with RapidILL requests.

Rapid Partner Visibility

When **rapido_show_rapid_partner** (**Configuration > Resource Sharing > General > Other Settings**) parameter is set to `true` (default), the **Rapid Partner** field is displayed in the Request information on the right pane. Additionally, requests can be faceted using the **Rapid Partner** facet. See [Facets](#).



Note

This functionality is especially useful if more than one Rapid Partner is defined.

Request information ^

Requested format: Digital

Requested media: Any

Lending library:  

Rapid Partner: Rapid ILL

Internal identifier: 8187592760002908

Created: 11/09/2023 18:28:54 PM PDT

Updated: 11/09/2023 18:30:41 PM PDT

Last interest date: 22/12/2023

Request information Rapid Partner

Configuring Rapido Letters

To configure letters, you must have one of the following roles:

- General System Administrator
- Letter Administrator

The following letters ([Configuration > General > Letters > Letters Configuration](#)) are used by Rapido throughout the different flows.

For information on adding non-default fields to Rapido letters, see [Available Fields for Rapido Letters](#).

Rapido Letters

Letter Name	Letter Description
Patron Letters	
Change Rapido Request Terms Letter	An automatically generated letter that notifies the patron if the terms that were defined by the previous lender were changed when the request is moved to a new lender.
Document Delivery Notification Letter	<p>When a patron has requested digital material and the send method on the request is Attach Documents - Link, this notification is emailed to patrons to provide links to the file. See Attaching Digitized Items To Be Sent To a Patron.</p> <hr/> <p>Note</p> <p>This letter can be sent automatically once the lending partner provides the item or when the institution uploads the file manually and sends it to the patron.</p> <hr/>

Letter Name	Letter Description
Ful Borrowing Info Letter	<ul style="list-style-type: none"> Automatically sent to patrons when the Send Courtesy Notices and Handle Loan Renewals job is run. Manually sent when a staff member manually renews a loan. Sent to a patron to indicate whether a loaned resource sharing item was successfully renewed. See Managing Resource Sharing Borrowing Requests.
Ful Cancel Request Letter	<p>Indicates that a request was canceled and the cancellation reason.</p> <hr/> <p>Note</p> <p>This letter is not sent if the date by which the request is needed has passed.</p> <hr/>
Resource Sharing Request Confirmation Letter	<p>Rapido automatically sends a confirmation email when a request is placed to confirm with the patron that their request has been placed.</p>
Query To Patron Letter	<ul style="list-style-type: none"> Sent to patrons when the library staff selects Send Query to Patrons from a resource sharing request. See Peer-to-Peer Resource Sharing. This letter is only used when the institution is using patron query types; see Configuring Patron Queries. To configure, see Example Letter Customization: Query to Patron Letter. For an example on adding the missing code to the letter, see Send Query To Patron Insert.
Welcome Partner Letter	<ul style="list-style-type: none"> The password and the username to log in to their Primo account (in addition to the existing user ID) The subject of the letter should be: Confirmation of Library Partner Account Creation The letter name should be: Welcome Partner Letter
<p>Lending Workflow Letters</p>	
Ful Incoming Slip Letter	<p>A slip that is printed by the library staff from the Resource Sharing Lending Requests task list when they need to retrieve an item from the shelf to be shipped to a borrower (see the print slip description in Receiving Physical Material). You can also include a printable barcode image in this letter.</p> <hr/> <p>Note</p> <p>The Ful Incoming Slip Letter and Resource Sharing Shipping Slip Letter both use the same Print Slip button in Alma and Rapido.</p> <hr/> <p>For information on extracting metadata from a lending request, see How to add information from the resource</p>

Letter Name	Letter Description
	<p>sharing request to the lender.</p> <p>A shipping label can also be added as a template.</p> <p>Additionally, when configured (Fulfillment > Resource Sharing > Partners) , you can include the Alternate Symbol by adding the notification_data/alternate_symbol field.</p>
Ful Resource Request Slip Letter	<p>A slip that is printed out by library staff from the Pick Up Requested Resources page when they need to retrieve an item from the shelf. For details on pickup up items from the shelf, see Pickup at Shelf. You may include a printable barcode image on this letter.</p> <p>The barcode is populated for item-level requests, not title-level requests. For title-level requests, there could be multiple possible items, so the barcodes appear as optional barcodes, and not a specific barcode linked to the request.</p> <p>This letter is also printed when an item that had a hold request is returned.</p> <hr/> <p>Note</p> <p>This letter does not include the borrowing institution field on the letter by default. To add this field, enable the supplied_to code (Configuration > General > Letters > Letters Configuration) and add <code><xsl:value-of select="notification_data/partner_name"/></code></p> <hr/>
Lending Requests Report Slip Letter	<p>A slip that is printed out by library staff for the selected requests in the lending task list that lists the availability of the items so that they can be taken off the shelf and shipped to the requester.</p>
Partner Invoice Letter	<p>Emailed to relevant partners detailing the costs for the request.</p>
Partner Lost Damaged Invoice Letter	<p>Emailed to relevant partners when a lender uses the Send Invoice Lost/Damaged Invoice action. The letter contains the invoice number, request identifier, and the lost/damaged charge for the request.</p>
Resource Sharing Conversation Letter	<p>Email a partner directly from the lending task list request. This option eases workflows, such as when a lender wants to convey limitations or for any type of messages such as a thank you note. These messages are saved in the request for future reference.</p>
Resource Sharing Shipping Slip Letter	<p>A user selects the Ship Item link for a lending request and then selects Automatically Print Slip = Yes on the Shipping Items page. You can include a printable barcode image in this letter.</p> <p>Additionally, when configured (Fulfillment > Resource Sharing > Partners) , you can include the Alternate Symbol by adding the notification_data/alternate_symbol field.</p> <hr/> <p>Note</p> <p>This letter does not include the Pod ID and Pod Name by default. To add these fields, enable pod_id and pod_name labels (Configuration > General > Letters > Letters Configuration).</p> <hr/>

Letter Name	Letter Description
Request New Resource Sharing Partnership Letter	This letter is used to contact an identified partner within the directory from the Find Partner workflow, using the Send Rapido Request action, to begin the process of adding the potential partner as a new partner.
Borrowing Workflow Letters	
Resource Sharing Conversation Letter	<p>Email a partner directly from the borrowing task list request. This option eases workflows, such as when a borrowing library wants to ask a question or for any type of messages such as a thank you note. These messages are saved in the request for future reference.</p> <p>Correspondence can be initiated using the Send email to partner action or from the Start Communication button on the Communications tab.</p>
Resource Sharing Receive Slip Letter	A slip that prints automatically when the Automatic Print Slip option is selected for Received Items. You can include a printable barcode image in this letter.
Resource Sharing Return Slip Letter	<p>Printable when returning a borrowing item to the lender. You can include a printable barcode image on this letter. The letter prints if:</p> <ul style="list-style-type: none"> • Scanning in an item triggers a return (including Managing Patron Services and Return Items menu option) • Using the Return option in the task list (see Workflow Actions) <p>Additionally, when configured (Fulfillment > Resource Sharing > Partners) , you can include the Alternate Symbol by adding the <code>notification_data/alternate_symbol</code> field.</p> <p>The letter is not relevant for NCIP transactions.</p> <hr/> <p>Note</p> <p>This letter does not include the Pod ID and Pod Name by default. To add these fields, enable <code>pod_id</code> and <code>pod_name</code> labels (Configuration > General > Letters > Letters Configuration).</p> <hr/>
Resource Sharing Email Workflow Letters	
Ful Cancel Email Letter	Indicates that a resource sharing request was canceled. Automatically sent to partners when a resource sharing borrowing request is sent to a partner whose Type = Email .
Ful Outgoing Email Letter	For borrowing requests sent to a partner with a profile type <i>Email</i> .
General Message Email Letter (only if working	An email sent to the resource sharing partner to alert them of a new general message that has been entered on the request.

Letter Name	Letter Description
with email partners)	
Lender Reject Email Letter (only if working with email partners)	Sent to the borrowing partner when the lending partner has rejected a lending request.
Lender Will Supply Email Letter (only if working with email partners)	When a letter wants to notify a borrowing partner that they are working on a request, this letter is sent to the borrowing partner when the status of a resource sharing request changes to Will Supply .
Lender Ship Email Letter	Sent to the borrowing partner to indicate that the requested item has been shipped.
Borrower Receive Email Letter (only if working with email partners)	Sent to the lending institution when the loaned item has been received at the borrowing institution.
Borrower Return Email Letter (only if working with email partners)	Sent to the lending institution when the borrowing institution has returned the loaned item.
Ful Renew Email Letter (only if working with email partners)	Indicates that a resource sharing request has been renewed. Sent to partners automatically when a resource sharing borrowing request is sent to a partner whose Type = Email .
Ful Damaged Email Letter	Sent to the lending partner to notify them that a resource sharing item has been damaged.
Ful Lost Email Letter	Sent to the lending partner to notify them that a resource sharing item has been lost.
Lending Recall Email Letter (only if working with email partners)	Sent to the borrowing partner when an item is recalled and must be returned. Not used in Rapido but is used in Peer to Peer. In Rapido a general message is being used for sending recall.
Lender Checked-In Email Letter (only if working with email partners)	Sent to the borrowing partner when an item was checked in at the lending institution.

Letter Name	Letter Description
Lender Renew Response Email Letter	Sent to the borrowing partner when the lending partner responds to a renewal request.
Borrower Overdue Email Letter	Sent by the lending institution to the borrowing partner when a resource is overdue. When sent using ISO protocol, the request on the borrowing side is automatically marked as overdue.
Other Letters	
Externally Obtained Letter	Sent to patrons; contains a URL for a requested article obtained through the CCC GetItNow service.
ARTEmail message	For working with the British library.
Rapido Request Letter	Rapido sends a request to a potential lender for a new resource sharing partnership.
Borrower Claim Email Letter	For peer-to-peer partners, the letter is sent when the Automatic Claim field is enabled on the borrowing request and the value of the Time to Claim (days) is reached. See Resource Sharing Partners .
Interested In Letter	Informs someone who is registered as "interested in" about a change in a PO line status. For details on interested users, see the description in Find PO Lines for Receiving Fields in Receiving Physical Material .

Document Delivery Link for Multiple SAML Authentication Profiles

For cases where a user has more than one SAML IDP profile in their system should configure the Document Delivery Notification Letter so the SAML link includes the idpCode for the correct SAML profile.

```

<!-- Do not remove Ex Libris workaround created variable to alter current SAML delivery
page -->
<xsl:variable name="SAML_URL">
<xsl:value-of select="notification_data/download_url_saml" />

</xsl:variable>

<xsl:variable name="DOCID">
<xsl:value-of select='substring-after($SAML_URL,"digitalDoc")' />

</xsl:variable>

<xsl:variable name="GOOD_SAML_URL">

```

```

<xsl:value-of select='concat("https://<Alma Host Name>/services/
login?auth=SAML&idpCode=<SAML IDP Profile Code>&digitalDoc=", $DOCID) ' />
</xsl:variable>

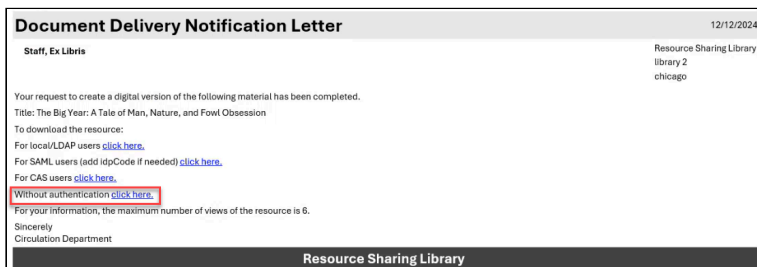
</tr>
<tr>
<td><a>
<xsl:attribute name="href">
<xsl:value-of select="$GOOD_SAML_URL"/>
</xsl:attribute>@@for_saml_users@@@click_here@@</a>
</td>
</tr>

<!-- GOOD_SAML_URL select ends -->

```

Libraries can include a link in the Document Delivery Notification Letter email that does not require authentication. To ease the patron experience and align with practices at your library, digital requests can be accessed without first authenticating.

When the parameter **rs_no_authentication_document_delivery** ([Configuration > Fulfillment > General > Other Settings](#)) is set to `true` (default `false`), the linked content can be accessed without authentication. In default letters, the link is included in the Document Delivery Notification Letter and does not require user authentication when opening the link.



Document Delivery Notification Letter - Without authentication link

To include this link in your edited letters, see [Available Fields for Rapido Letters](#).

Request History

Rapido can record metadata changes in the **History** tab using the same convention, which displays the old value and the new value of each recorded field. Any change made in the **Resource Information** section is recorded and viewable in the **History** tab of the request. The changes can be done from the edit screen, right panel or using the API. Every time you edit and save the borrowing request or a lending request, check each field in the **Resource Information** section if the old value is equal to the new value and record any changes that are tracked.

The following example showcases old and new **ISBN** and **System Control Number**:

Resource Sharing Borrowing Request

Beginning to be a Jesuit: instructions for the Paris novitiate circa 1685

General Information | History | Rota | General Messages | Notes | Received Items | Attachments | Communications | Held By

Resource Information

Title * Beginning to be a Jesuit: instructions for the Paris novitiate circa 1685

Author Jesuits

Author Initials

ISBN 9781880810767

System Control Number 775607237

LCCN

Barcode

Other standard ID

Remote record ID

Publisher Institute of Jesuit Sources

Old ISBN and System Control Number

Resource Sharing Borrowing Request

Beginning to be a Jesuit: instructions for the Paris novitiate circa 1685

General Information | History | Rota | General Messages | Notes | Received Items | Attachments | Communications | Held By

Resource Information

Title * Beginning to be a Jesuit: instructions for the Paris novitiate circa 1685

Author Jesuits

Author Initials

ISBN 9781880845635

System Control Number 775684224

LCCN

Barcode

Other standard ID

Remote record ID

Publisher Institute of Jesuit Sources

New ISBN and System Control Number

After the staff saves the request, new entries should be added to the **History Tab**.

Viral polymerases and related proteins

General Information | History | Rota | Parameters | General Messages | Notes | Received Items | Attachments | Communications | Held By

View Mode: Full

Date	Operator	Field Name	Old Value	New Value
1 19/08/2025 15:33:15 IDT	ex_impl	ISBN	9781880810767	9781880845635
2 19/08/2025 15:33:15 IDT	ex_impl	System Control Number	775607237	775684224
3 19/08/2025 15:16:09 IDT	System	Status	Locate in process	Locate failed
4 19/08/2025 15:16:08 IDT	ex_impl	Status	Created borrowing request	Locate in process
5 19/08/2025 15:16:08 IDT	ex_impl	Shipping Cost		

History tab