ExLibris Knowledge Center
Part of Clarivate

Lending Customization

Lending Policies — Participating Items

To manage resource sharing lending requests, you must have the Fulfillment Services Manager, Fulfillment Services Operator and Fulfillment Administrator roles.

Participating items are sets of physical items used for fulfilling resource sharing requests. Participating items must be defined for each resource sharing member.

Adding Participating Items

You add participating items to determine which physical item sets are available for lending.

To add participating items:

1. Edit a member (**Configuration > Resource Sharing > Members**).
2. From the **Physical Items Lending Policies** tab, check **Supplies physical items**.
3. Select **Add Participating Items** to determine which media are available for lending.
4. Enter a **Name** for the media type.
5. Select the **Material Type** conditions.
6. Select the **Item Policy** conditions.
7. Select the **Location**.

   Note

   The **Location** is the item's current location and not the permanent location.

8. Select **Add** to add the participating item(s) and continue adding more participating items, or select **Add and Close** to add the participating item(s) and close the Add Participating Items window.

Adding a Physical Lending Policy

Lending policy terms make requests for physical items available to other Rapido institutions that are not part of a pod. This information is available for other institutions when using the **Find Partners** action from borrowing requests if they have signed the resource sharing agreement.

To add a physical lending policy:

1. Edit a member (**Configuration > Resource Sharing > Members**).
2. From the **Physical Items Lending Policies** tab, check **Supplies physical items**.
3. Select **Add Physical Lending Policy** to specify the terms for each type of item.

4. Select the P**articipating Items**.

Note

Selecting **All Items** refers to all items that exist in this Alma IZ.

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5. Select the **Supply Term For**.
6. Enter the **Delivery Time**.
7. Enter the **Loan Period**.
8. If relevant, enter a **Cost**.
9. If relevant, check **Allow Renewal**.
10. If relevant, check **Allow Rush**.
11. If relevant, enter an **Expiry Time** in days.
12. Select **Add** to add the physical lending policy and continue adding more physical lending policies, or select **Add and Close** to add the physical lending policy and close the Add Physical Lending Policy window.

When Rapido is used by a non Alma ILS, titles are checked by Rapido for participating items in real time by using API calls to the relevant ILS to determine the status of the title's items. API calls are supported for the following ILSs:

- Folio
- Sierra
- Polaris
- Koha
- SirsiDynix Symphony
- TLC Library Solution

As a result of Rapido's reliance on the ILS managed inventory and its exposure through the API, when Rapido is used by non Alma ILSs, the options for defining participating items are dependent on the ILS APIs and vary between the different ILS, as below:

System	Configurable elements
Folio	Location
Sierra	Location, Item Type and the following boolean indicators: • Suppressed
Polaris	Location, Material Type and the following boolean indicators: • Holdable • Display in PAC • Non Circulating
Koha	Location, Item Type, Collection and the following boolean indicators: • Restricted • Withdrawn

System	Configurable elements
	• Lost • Damaged • Not for Loan
SirsiDynix Symphony	Location, Item Type and five item categories
TLC Library Solution	Location

Digital Lending

Configuring Digital Lending Policies

eBook pod members can configure their eBook participating item policies to include sets that contain EILL Eligible items.

To configure eBook participating item policies:

1. From the **Digital Lending Policies** tab (**Configuration > Resource Sharing > Configuration > Members**), select **Add Participating eBooks**.
2. From the **Add Set** dropdown list, select a predefined set (**Admin > Manage Jobs and Sets > Manage Sets**) to include in the eBooks available for lending. For more information on creating sets, see Creating Logical Sets. The logical set is added to the participating eBooks available for lending.

Configuring Material Supply Methods

Lenders configure how material is supplied to the borrowing library by setting the **Select Digitization Target** option in **Configure > Fulfillment > Digitization and Copyright Rules**.

- Supply via Link: The maximum file size is 1,000 MB
- Supply via Attachment: The maximum file size is 25 MB, in alignment with common email provider limits.

When an attachment is supplied, the borrowing team must download the file and upload it for the end user. To streamline the process and avoid size limitations, it is recommended to select **Supply via Link**.

Defining Participating Items Sets for RapidILL

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

RapidILL automatically pulls this data weekly and processes it into RapidILL holdings. These are the holdings that RapidILL uses to determine which requests are received and what is locally owned.

Each title extracts the following metadata from the holdings process:

- Title

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

For information on defining sets, see Rapid OAI Holdings - Step 2: Defining Sets.

Setting Lending Request Limits

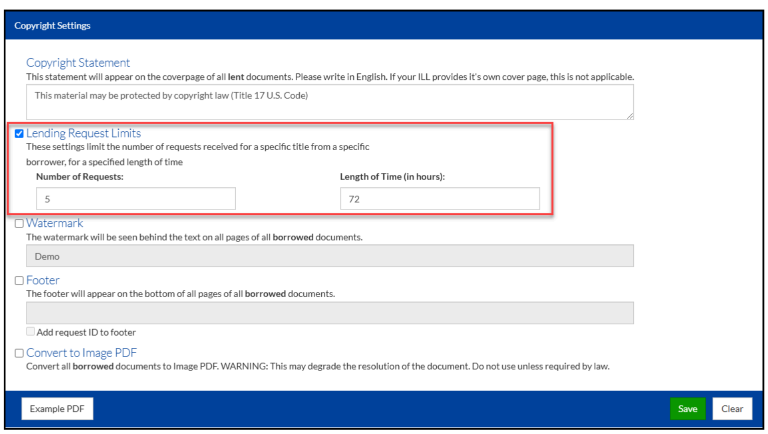
Note

This configuration may be relevant for libraries where copyright limits apply to lenders. Currently, these settings need to be configured in RapidILL.

Lenders can configure how many requests to allow from a single borrower within a specified number of hours.

To set lending request limits:

1. From the RapidILL **Settings > My Profile > Copyright Settings page**, check the **Lending Request Limits** checkbox.
2. Enter the maximum **Number of Requests**.
3. Enter the interval by **Length of Time (in hours)** to allow the borrower to send requests.
4. Select **Save**. Requests from the same borrower are limited, and additional requests move to another lender. If there are no additional lenders, the request is rejected by RapidILL partner.



Lending Request Limits

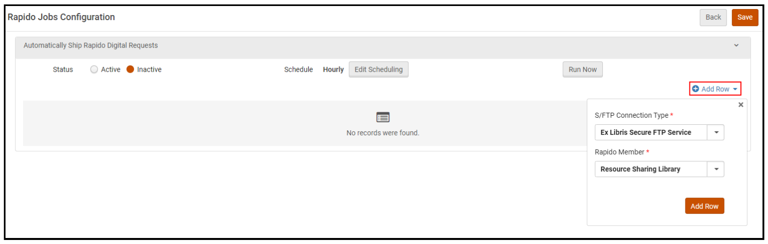
Automatically Ship Rapido Digital Requests Job

Rapido supports batch automatic delivery of digital lending requests from a configured folder. This functionality uses the **Automatically Ship Rapido Digital Requests** (default **Inactive**) job to scan a configured folder to then attach files to the right request. The attached files are then automatically sent to fill the borrowing request. Configuring this job enables staff to skip manually attaching files to individual lending requests. To enable automatic processing for lending requests with scanned resources saved in a folder, use the **Automatically Ship Rapido Digital Requests** job.

Note

The **Automatically Ship Rapido Digital Requests** job relies on the file names being saved with the internal identifier of the lending request.

Select **Add Row** and select the **S/FTP Connection Type** (as configured in **Configuration > General > External Systems > S/FTP definitions**) and **Rapido Member**. The job can be scheduled hourly, daily, weekly, or monthly, or you can **Run Now.**



Automatically Ship Rapido Digital Requests job configuration

When using this job, the lending files should be saved with the internal identifier name.

The Digitization Workflow Setup (**Configuration > Fulfillment > Copyright Management > Digitization and Copyright Rules**) determines what kind of output the borrowing institution receives, based on what output type (link or attachment) is selected in the **Select digitization target** drop down list. When the job is run, a folder **AutoShipFileTmp** is created in the institution's root directory folder with a folder for shipped files and a folder for failed deliveries.

Conditional Terms of Use for Digital Requests

Lenders filling digital requests can indicate whether the supplied document has terms of use. If shipping terms of use are applied, the request requires manual handling by the borrowing staff. Terms of use can indicate requirements such as supplying the document as a physical non-returnable printout for copyright compliance such as printing a physical copy that can be shared with the patron as a non-returnable physical copy. This new option enhances copyright control by enabling the lender to specify to the borrower that the document cannot be shared with the patron. As a lender, you can enable the relevant terms from **Configuration > Fulfillment > Resource Sharing > Shipping Terms of Use**. By default, only the **NONE** term is enabled. The other available terms are:

- Library use only
- No reproduction
- Client signature required
- Special collections supervision required

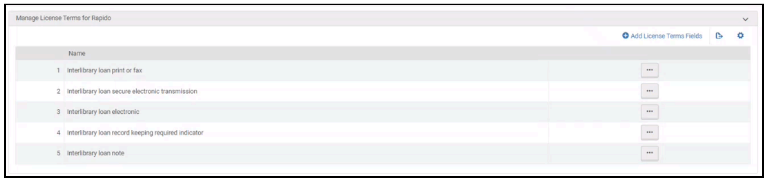
Lending License Visibility

Rapido includes the ability to select the license fields to be added to the screen rather than using the Primo screen for this flow. (**Resource Sharing > Configuration > Manage Download Electronic Resource**)

The following are out-of-the-box and can be deleted if they are not needed:

- Interlibrary loan print or fax
- Interlibrary loan secure electronic transmission
- Interlibrary loan electronic

- Interlibrary loan record keeping required indicator
- Interlibrary loan note



Electronic Resources

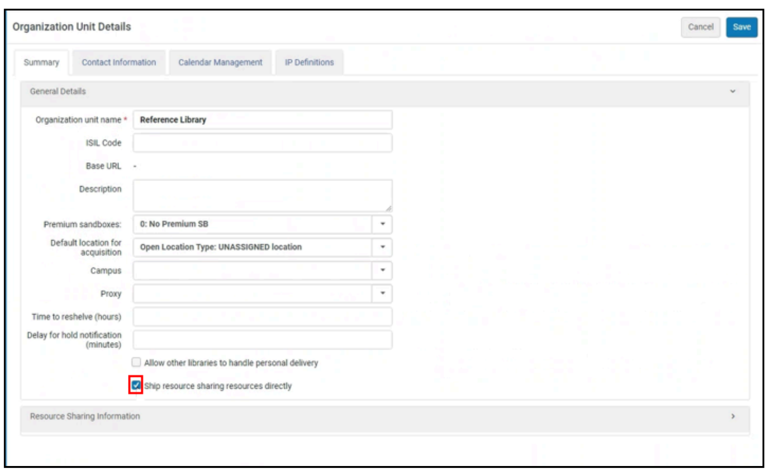
Each license field that is enabled appears in the right pane.

Shipping

Enabling Branches to Ship Directly

This feature enables institutions to define which library can ship on its own, without needing to send the resource to the resource sharing library to ship the resource to the borrowing institution.

Check **Ship resource sharing resources directly** (**Configuration > General > Libraries > Add a Library or Edit Library Information**) to enable branches to ship resources directly from a borrowing institution instead of sending the request to the associated resource sharing library.



Ship resources directly configuration

We recommend enabling the **Move to Branch** to **Automatically create move or digitization request for incoming request**, (see Creating a Move Request Configuration). This creates the fulfillment request for the staff at the branch to handle without needing to access the resource sharing requests task list.

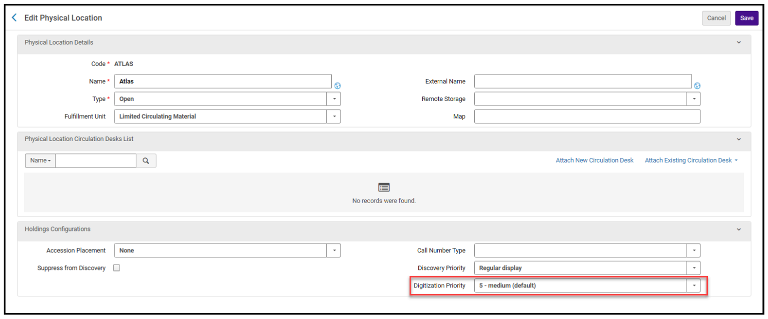
If the above is configured and the staff has fulfillment privileges in the library defined as allowed to ship resources directly from the branch while at the scope of that library, the **Shipping Items** menu (**Fulfillment > Resource Sharing > Shipping Items**) and the **Scan In Item** page > **Shipping Items** button are visible. The user can use either one of them to ship the resource. The resource sharing request is then updated accordingly, for example, **Shipped Physically**.

Prioritizing Libraries and Locations for Digital Activation

New for February! When multiple copies exist for a title requested for digitization or Ship Digitally, locations can be prioritized through an optional setting (value from 1 to 10):

- Medium (default) priority - **5**
- Lowest Priority - **1**
- Highest Priority - **10**

During activation, Rapido evaluates eligible holdings based on this priority and activates the request on the highest-priority available copy. This applies to both patron digitization and Ship Digitally requests.



Digitization Priority

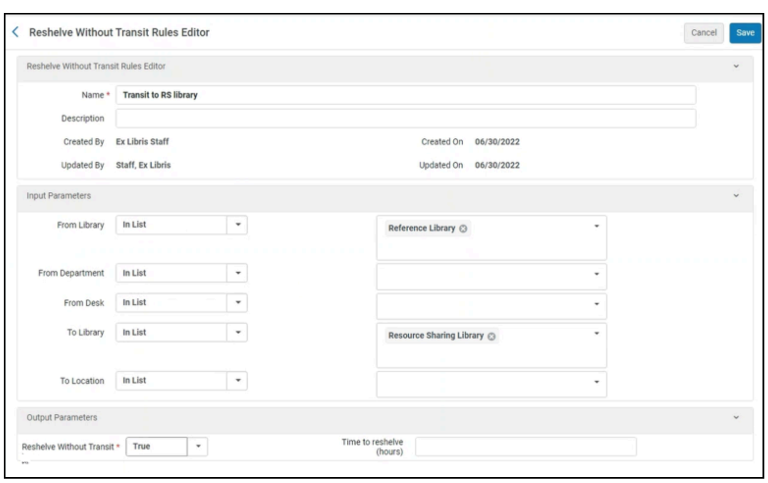
Physical Shipping

Configuring Reshelve Without Transit Rules

To configure reshelve without transit rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You configure reshelve without transit rules from the Reshelve Without Transit Rules page (**Configuration > Fulfillment > Library Management > Reshelve Without Transit Rules**) to set relationship rules between libraries, departments, and circulation desks so that transit for reshelving is not required between certain libraries. This reduces redundant work effort by not automatically putting items in transit for reshelving when the libraries are close to each other. This does not affect other transit types, such as hold shelf, work orders, and processing.



Reshelve Without Transit Rules Editor

The default input parameter rules are empty. The default output parameter is set to False, which means all items should be set into transit when reshelving.

Each rule can be either enabled or disabled. By default, both rules are enabled.

Configuring Scan In Messages

You can set a message to warn users that scanning in items will complete the lending process.

Configure the **Complete lending request** (**Configuration > Fulfillment > Physical Fulfillment > Scan In Messages Configuration**) parameter (default **Show message** `None`).

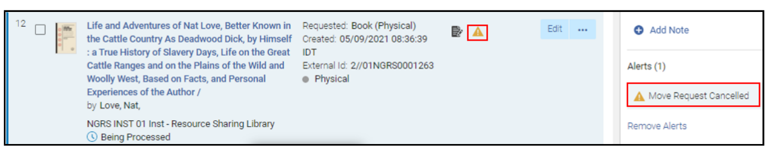
If **Show message** is set to `Popup message` and **'Cancel" available at popup** is set to `Yes`, if an item is scanned in and is part of a Resource Sharing Request that is linked to a lending request with the status **Shipped Physically**, a warning message requires the user to **Confirm** or **Cancel**. This prevents users from unintentionally completing the lending request.

If **Show message** is set to `Feedback message` and **'Cancel" available at popup** is set to `Yes`, the feedback notifies the user that the request will be completed, but the scan in action cannot be canceled.

Alerts

Configuring Lending Alerts

Alerts can be attached to a lending request during the main steps of a request's workflow.



Lending Request Alert

The alerts show the progress of the request (**In Process**, **Canceled**, or **Completed**). The following alerts are currently supported and can be configured from **Configuration > Resource Sharing > Configuration > Manage Lending Alerts**:

Lending Alerts

Code	Description	Enabled By Default
AUTO_GENERATED_PARTNER_MISSING_DATA	Auto-Generated Partner Missing Manadatory Information	Yes
CITATION_DIGITIZATION_REQUEST_CANCELLED	Digitization Request Cancelled	Yes
CITATION_DIGITIZATION_REQUEST_COMPLETED	Digitization Request Completed	No
CITATION_DIGITIZATION_REQUEST_IN_PROCESS	Digitization Request in Process	No
MANUAL _RAPIDO_REQUEST_LOCATE_FAILED	Manual Rapido Request locate Failed	Yes
CITATION_MOVE_REQUEST_CANCELLED	Move Request Cancelled	Yes
CITATION_MOVE_REQUEST_COMPLETED	Move Request Completed	No

Code	Description	Enabled By Default
CITATION_MOVE_REQUEST_IN_PROCESS	Move Request in Process	No
NEW_REQUEST_CREATED_FOR_PARTNER	New Lending Request Created For Specific Partner	Yes
REQUEST_COST_EXCEEDED	Request Cost Exceeds Maximum Borrowing Cost Allowed	Yes
REQUESTER_EMAIL_EMPTY	Requester Email Empty	Yes
RESEND_REQUEST_RECEIVED	Resend Request Received	No

Costs to Partner

Configuring Shipping Cost Lender Rules

You can add a rule to apply shipping and overage costs to borrowing requests. These cost fields are controlled by the **Base fee page limit** (**Configuration > Fulfillment > Resource Sharing > Shipping Cost Lender Rules**) parameter. These costs are displayed in the right pane of the borrowing and lending requests.

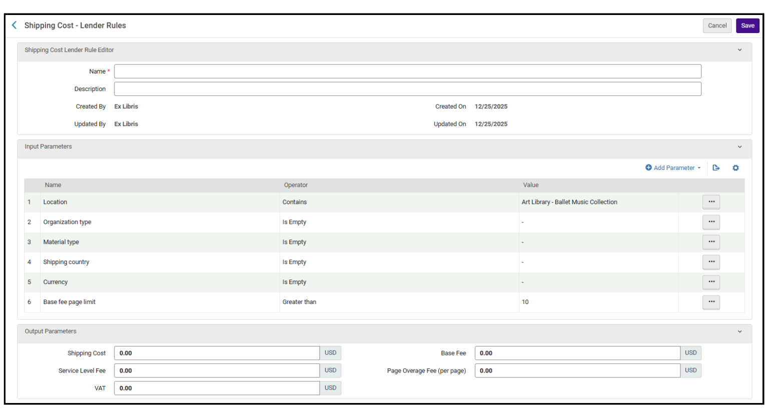
For example, if the total amount of pages permitted at the **Base Fee** rate is `10`, and the total number of pages requested is `20` (calculated from the **Pages** field on the Borrowing request or the **Start page** to **End page**), and the **Base fee page limit** value is `10`, and the Page Overage Fee is `1`, then the patron cost is 10 (the total pages requested minus the **Base fee page limit** value) plus the sum of the amounts configured for the **Shipping Cost**, **Service Level Fee**, or **Base Fee**. In the example below, the total patron cost is `15`.

The **Base fee page limit** rule only applies if the total requested pages exceed the configured **Value**.

You can configure additional input parameters to refine shipping cost rules:

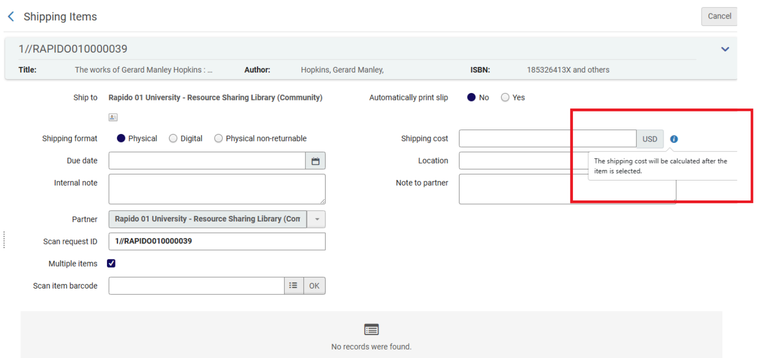
- **Location**: Multi-select dropdown based on library location and hierarchy.
- **Organization Type**: Dropdown using values from the Partner Organization Type code table (Resource Sharing Partners).
- **Material Type**: Multi-select dropdown based on supplied item types.
- **Shipping Country**: Dropdown using values from the Country Code table.
- **Currency**: Dropdown using values from the Currency Subset mapping table.

Use the **VAT** output parameter to apply VAT charges as needed.



Shipping Cost - Lender Rules

When an institution configures shipping cost lender rules with an input parameter that relates to an item (such as **Location** or **Material Type**), the shipping cost cannot be calculated immediately when the screen loads, because the item has not yet been selected. For additional clarity, Rapido displays an information icon **(i)** next to the Shipping Cost field. Selecting this icon displays a message **The Shipping cost will be calculated after the item is selected.**

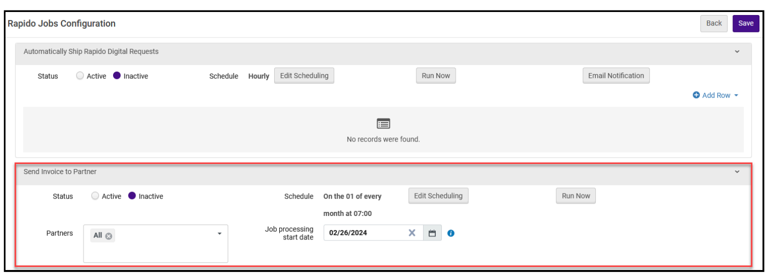


The shipping cost will be calculated after the Item is selected

Send Invoice to Partner Job

Lending institutions can send invoices directly to borrowers for requests that include fees using the **Send Invoice to Partner** job, (**Inactive** by default).

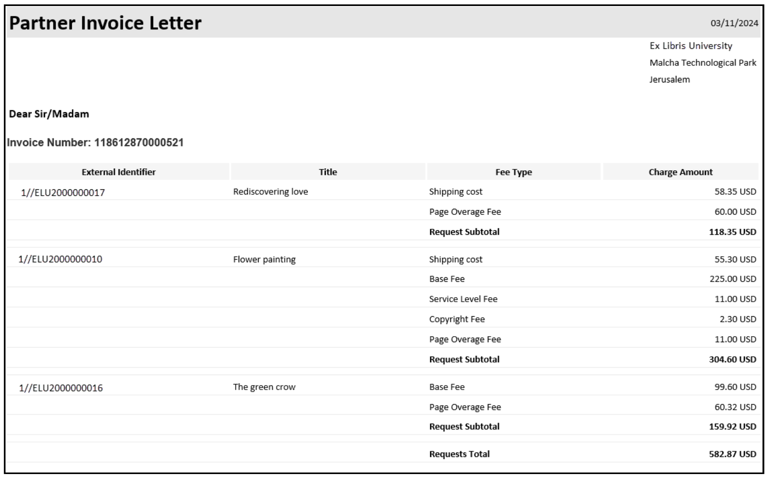
You can specify which partners should be emailed invoices (default `All`). The partners available in the list are partners with at least one lending request attached to them with a processing fee. The **Job processing start date** is the last date the job ran. If the job has not run, the **Job processing start date** defaults to today's date.



Rapido Jobs Configuration - Send Invoice to Partner job

The **Send Invoice to Partner** job report can be accessed from **Admin > Manage Jobs and Sets > Monitor Jobs > History** tab with a list of how many invoices were sent successfully and the reason for those that failed, along with the name of the invoices that failed and why.

When the **Send Invoice to Partner** job runs successfully, the Partner Invoice Letter (**Configuration > General > Letters > Letters Configuration**) is emailed to relevant partners detailing the costs for the request.



Partner Invoice Letter 03/11/2024

Ex Libris University
Malcha Technological Park
Jerusalem

Dear Sir/Madam

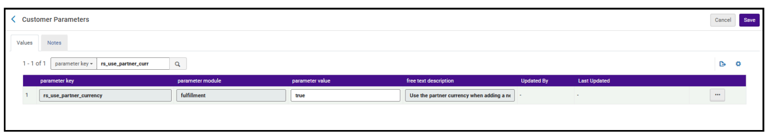
Invoice Number: 118612870000521

External Identifier	Title	Fee Type	Charge Amount
1//ELU2000000017	Rediscovering love	Shipping cost	58.35 USD
		Page Overage Fee	60.00 USD
		Request Subtotal	**118.35 USD**
1//ELU2000000010	Flower painting	Shipping cost	55.30 USD
		Base Fee	225.00 USD
		Service Level Fee	11.00 USD
		Copyright Fee	2.30 USD
		Page Overage Fee	11.00 USD
		Request Subtotal	**304.60 USD**
1//ELU2000000016	The green crow	Base Fee	99.60 USD
		Page Overage Fee	60.32 USD
		Request Subtotal	**159.92 USD**
		Requests Total	**582.87 USD**

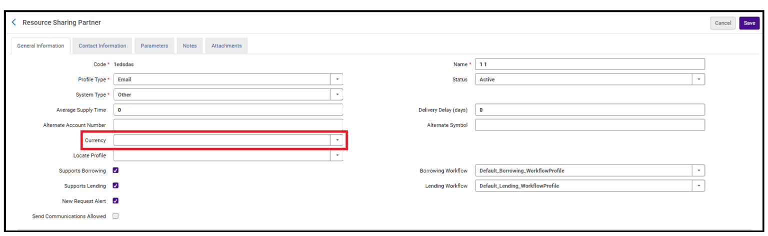
Partner Invoice Letter

Currency Handling

Currency handling within the Request Cost section can now reflect the currency of the partners. Currently, the currency reflected in Request Cost is defined via (**Configuration Menu > Acquisitions > General > Currency Subset**). To have the request cost reflect in the partner's currency, configure (**Configuration > Fulfillment > General > Other Settings**) `rs_use_partner_currency` to **true.** The default value is **false**. If `rs_use_partner_currency` is set to **true** 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**).



Customer Parameter

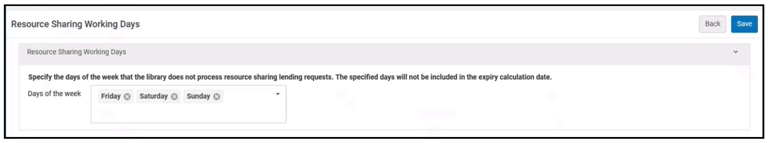


Currency field

Non-Supplier

Excluding Non-Workdays Days from Expiry Period

The **Expiry Time (days)** can either be defined on a partner or on a lending policy. A job runs that deletes unhandled expired requests. To prevent lending requests from expiring during non-workdays, Rapido enables you to set days to exclude from the expiry period calculation (**Configuration > Resource Sharing > Configuration > Resource Sharing Working Days**).



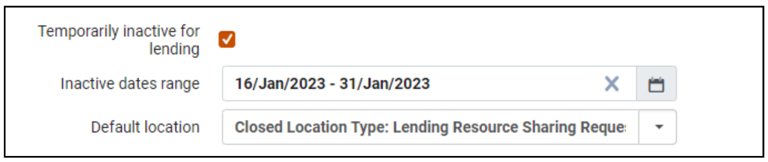
Resource Sharing Working Days configuration

Disabling Lending Hours in Rapido

To disable resource sharing lending hours, you must have a General System Administrator role.

To disable lending hours in Rapido:

1. Select **Configuration > General > Libraries > Add a Library or Edit Library Information**.
2. From the resource sharing library **Summary** tab, select **Temporarily inactive for lending**.
3. If relevant, select the **Inactive dates range**.



Temporarily deactivate lending

Note

For RapidILL users, when the parameter **rs_update_rapid_with_lending_offtime** (**Configuration > Fulfillment > General > Other Settings**) is set to `true` (default `false`), changes to the **Inactive dates range** field automatically updates the RapidILL Lending Off Hours.

Note

- The start date must be less than one year in the future.
- The duration cannot be longer than 30 days.
- Setting this configuration to true means that the configured inactive dates override the dates submitted using RapidILL webpages.
- The temporarily inactive checkbox remains selected after the date range until it is manually deselected.

Also see Disabling lending hours for RapidILL.

Note

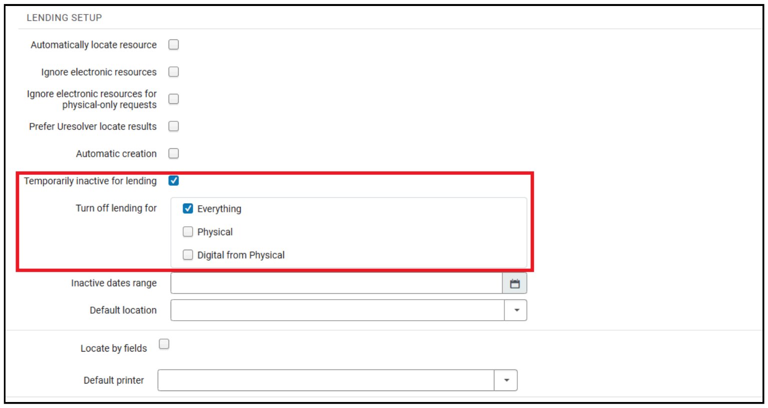
Lending will resume when the date range passes; however, the library must manually deselect the **Temporarily inactive for lending** checkbox.

Note

If there are active lending requests that cannot be filled due to the need to become temporarily inactive for lending, staff can reject these requests to move them to the next partner.

Temporarily Disable Lending for Different Formats

This feature enables users to selectively disable specific lending services, rather than disabling all services. In **Configuration > Fulfillment > Library Management > Library Details**, you can temporarily disable **Physical** lending, **Digital from Physical** lending, or disable **Everything**.



Temporarily inactive for lending

Temporary Inactive Date Ranges for Lending

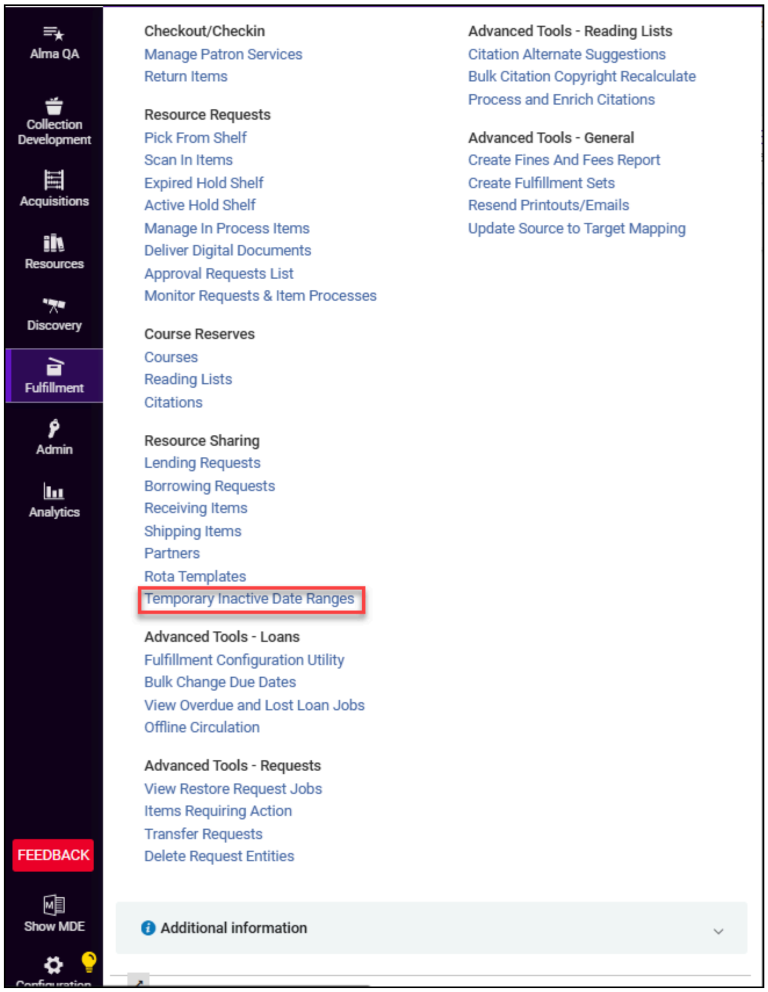
To configure contact information, you must have one of the following roles:

- Fulfillment Services Manager — enabled by default
- Fulfillment Administrator — enabled by default
- Fulfillment Operator — requires opening a ticket with the Clarivate Support team to enable it

This feature enables staff members to temporarily close the library for lending.

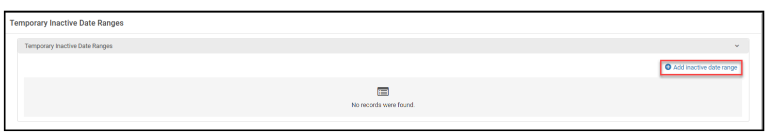
To add an inactive date range:

1. Select the **Temporarily Inactive Date Ranges** (**Fulfillment > Resource Sharing > Temporarily Inactive Date Ranges**) link.



A New Link

2. The **Temporary Inactive Date Ranges** window appears.
3. Select the **Add inactive date range** button.

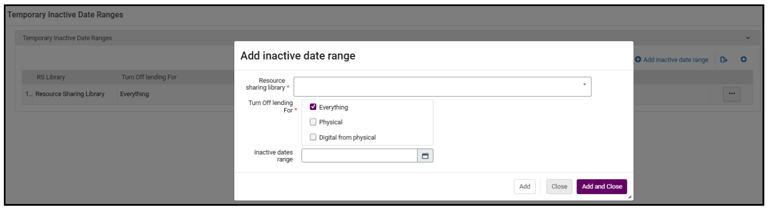


Add Inactive Date Range

4. A pop-up opens that allows the user to define an inactive period for one or more RS libraries.

- **Resource sharing library**: multi-select dropdown with all the resource sharing libraries of the institution. If a library is already defined as **temporarily inactive**, it does not appear in the dropdown, and the user cannot define additional inactivity for it. This field is mandatory.
- **Turn Off lending For**: see Temporarily Disable Lending for Different Formats.
- **Inactive dates range**: the date range in which the library will be inactive.

5. Select **Add and Close** after defining all fields.



Inactive Resource Sharing Library

6. Once the user sets one or more libraries as inactive, they appear in the **Temporary Inactive Date Ranges** section.

List of Inactive Libraries

Customizing Lending Reject Reasons

Library staff can customize their internal rejection reasons. When the Internal Reject Reasons table is configured (**Configuration > Resource Sharing > Configuration > Internal Reject Reasons**), the list of configured reasons is displayed in the **Internal reject reason** dropdown list. Library staff can also define a default value for the **Internal reject reason** dropdown list.

Customized Statuses

It is now possible to set the workflow profiles so that a lending request that is renewed is set to a status of **Renewal Accepted**. As opposed to the current behavior, where the request reverts to a **Received by partner** status. This makes it more evident for the lending library staff that the request has been renewed.