Partners

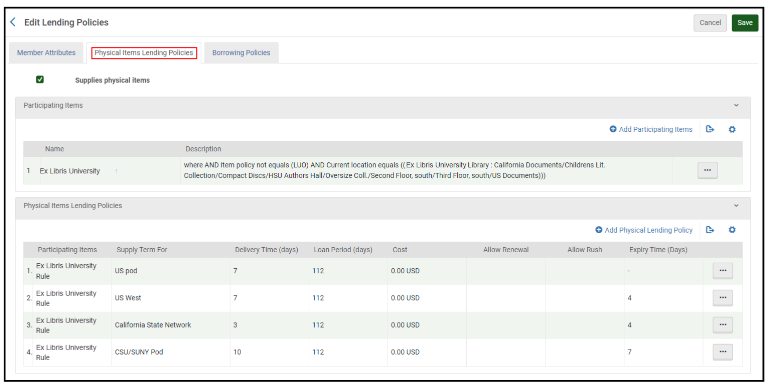
Rapido Partners

Rapido libraries can be connected with other Rapido libraries through Pods.

Mutual commitments within pods can include no transaction fees, delivery time, loan period, and more requests. To avoid overload on specific libraries, Rapido also allows load balance requests to ensure everyone lends and borrows equally. For more information, see [Rapido Pods](). Use [this]() form to be added to a pod by Ex Libris.

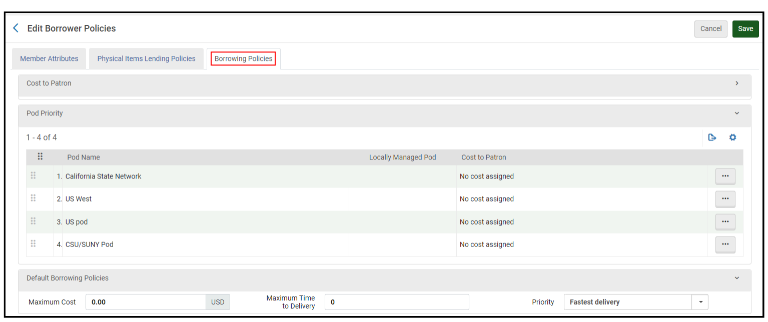
After your library is added to the pod by the Ex Libris staff:

1. Configure participating items for the pod (**Configuration > Resource Sharing > Configuration > Members > Physical Items Lending Policies**). When this is complete, the defined participating items are listed next to the pod name under the physical items lending policies section.

   Physical Items Lending Policies configuration

2. Configure the **Borrowing Policies** pods order based on priority.

   Borrowing Policies pod priority

- There are cases where you might want to allow resource sharing for a Rapido partner who is not part of a POD you belong to.
  - In this case, you can use the **Add Partner** function to send the request. As a prerequisite, both sides need to download the partner record from the **Community** tab (**Fulfillment > Resource Sharing > Partners**) to the institutional level and work at a peer-to-peer level.

Setting Up Rapid

To enable Rapido document delivery setup, you need to define Rapid as a partner and load your holdings by using the Alma Holdings Harvest for RapidILL.

Rotas and Pods Overview

Rotas

Rotas are a classic Alma resource sharing functionality. Using rotas relies on various configurations, such as adding partners, creating rotas, applying assignment rules, and Terms of Use (TOU). The locate is based on the library's locate configuration. These configurations may already be in place at some libraries implementing Rapido, and they may suit the new Rapido library if their preference is to maintain them.

Locally Managed Pods

A locally managed pod is a configuration option that is enabled by Rapido. When a library implements Rapido, it can select the rota option to manage it as a locally managed pod. If selected, some aspects of the previous rota use remain the same, while others introduce new considerations.

Locally Managed Pod still uses the Alma resource-sharing configurations for the added partner, the rota, and the library's configured locate settings. Instead of rota assignment rules managing this locally managed pod, the configuration of pod priority under borrowing policies determines the prioritized use of partners. This selection simplifies configuration by bringing the rotas and pods into a single list, allowing ordering by dragging and dropping into the preferred order of use.

Libraries can also define offers for end users to see when holdings are discovered by locally managed pods. This can present users with terms to expect, such as delivery times and loan periods. The presentation of the offers provides an experience consistent with items available through pod partners. Using locally managed pods works well for libraries that want to enhance existing rotas with pod prioritization and presenting terms. Locally managed pods are for physical resource sharing.

Note

When configuring terms for locally managed pods, it is best for all partners in the rota to use the same terms to present accurate terms to users. When partners have varying terms, libraries often display the most restrictive loan term and the longest expected delivery term, and the variance is either a faster delivery or a longer loan.

Pods

Pods connect Rapido libraries. Libraries opt into a pod if they are in the relevant geographical region and agree to work with the pod partners through the shared pod terms. Pods and pod members are managed by Clarivate.

When libraries use Rapido, no configuration is required to establish connections with pod partners. Unlike classic resource sharing, the pod connections do not require adding partners, rotas, locate settings, etc. The libraries define lendable items by attaching participating items to the pod and only receive requests from the pod for their participating items. If relevant, the library can have different participating items for different pods that they are a part of. The locate is based on the participating items. Libraries configure pod priority of use by ordering the pod list under borrowing policies. Existing pod members do not need to take action when new members join.

Pods can be public. This means they are open to any Rapido library in the region and listed in the pods documentation. Pods can be private with membership approved by a library representative and not listed on the pods documentation page. An example of private pods is for consortia connections. Pods are unique to Rapido and enable connections with other Rapido libraries for physical sharing. The community is also sharing eBooks through the **International DRM-free eBook** pod.

Hybrid Pods

Hybrid pods can be used to connect Rapido and Alma resource sharing libraries via shared terms. Rapido members use the same pod configuration of defining participating items and pod prioritization under borrowing policies. The partners that are using Alma resource sharing are connecting via classic peer-to-peer resource sharing configurations and workflows. They are required to match their partners' configurations in their rota to the pod terms.

To be added to the hybrid pod, the Alma resource sharing library must add itself to the resource sharing directory. All Rapido libraries are in the directory by default. Next, they need to define and attach participating items to the pod once they are in the pod. Hybrid pods are managed as private pods, with pod membership managed by a library representative. Alma resource-sharing libraries need to reconfigure when pod membership changes. Hybrid pods enable physical sharing.

Note

If libraries have overlapping partners in both rotas and hybrid pods, there is a configuration for hybrid pod exceptions to consider. This configuration is relevant for the library to continue lending with the partner via the rota terms rather than the hybrid pod terms. Hybrid pods are best used to connect Rapido and Alma resource-sharing libraries, while allowing each partner type to continue using familiar workflows and configurations.

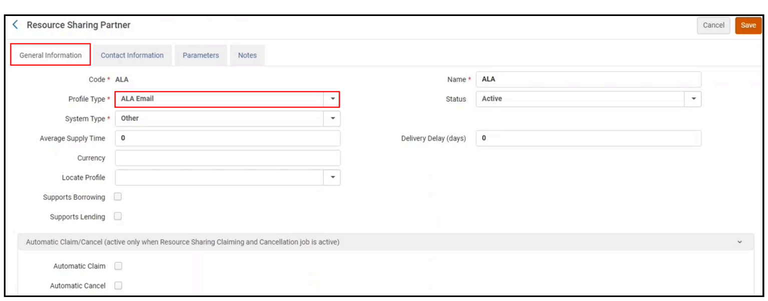
Beyond the Pods

Peer-to-Peer: Working with Partners Beyond the Pods

When a borrower and lender are in a hybrid pod, and the pod’s policy applies to a request, Rapido's locate function is based on the participating items. In peer-to-peer scenarios, without hybrid pod connections, the locate is performed using Terms of Use (TOU).

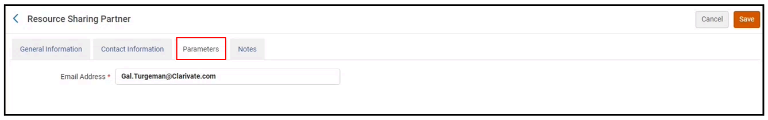
Configuring an ALA Profile Type

From the **Fulfillment > Resource Sharing > Partners > General Information** tab, select `ALA Email` as the **Profile Type**. The **System Type** defaults to `Other`.



Resource Sharing Partner configuration for ALA

From the Parameters tab, enter the email address that should receive the ALA form.



ALA Email Address Parameters

Defining Terms for Peer-to-Peer Resource Sharing (with Non-Rapido Libraries)

When requests are not fulfilled by Rapido, the following entities are used to create a peer-to-peer workflow:

- Configuring Partners
- Configuring Workflow Profiles
- Configuring Locate Profiles
- Configuring Rota Templates
- Configuring Rota Assignment Rules
- Defining a Default Level of Service
- Integrating with Z39.50

Configuring Partners

To configure the communication between Alma and resource sharing systems, you must have the following role:

- Resource Sharing Partners Manager

Resource sharing partners can be created to define the types of requests/receive communication that takes place between Alma/Rapido and a resource sharing system.

Your resource sharing partners can be other libraries or other resource sharing tools such as ILLIAD, BL, Subito, etc.

Start by creating the partners you want to work with.

From the Resource Sharing Partner List page (**Fulfillment > Resource Sharing > Partners**), select **Add Partner**.

You can find some partner libraries in the Alma directory under the **Community** tab.

For more information, watch Working with Partners Beyond Your Pods

Enabling Self Registration for Partners

Lenders can enable borrowers who are not resource sharing partners to self register for resource sharing services. The self registration functionality results in the automatic creation of a patron record and a corresponding email partner is automatically created and added to the Resource Sharing Partner list (**Fulfillment > Resource Sharing > Partners**). The patron record enables the lending library to allow the partner to log in, discover, and place requests based on display logic rules and terms of use related to the patron group. The partner record supports the lender's interactions and workflows with the registered partner.

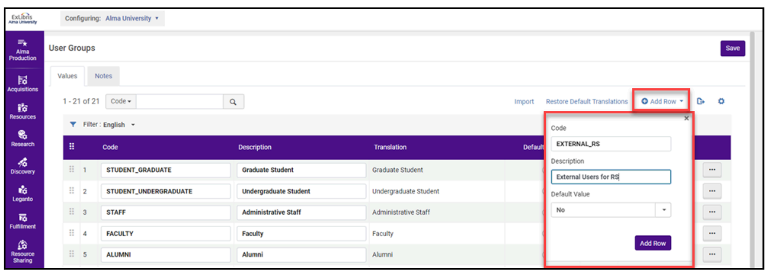
There are three methods for creating the self registered partners once the underlying configurations are in place. The library can enable the partner records to be created through the library's discovery. See Self Registered Partners via Discovery. The partner records can be created by staff via the add partner action within fulfillment. See Self Registration via Backend through Add Partner. The partner records can be created in bulk via API. See Enabling Self Registration Using API.

To enable self registration functionality, associate user group with the functionality via (**Configuration > Resource Sharing > Configuration > Borrower Self Registration**). This determines which user group is assigned to the created user record. Libraries can choose to create a new user group to associate with the self registered partners. Through configuring the fulfillment unit rules and display logic rules, the library can determine the experience and functionalities associated with this user group.

Create a New User Group

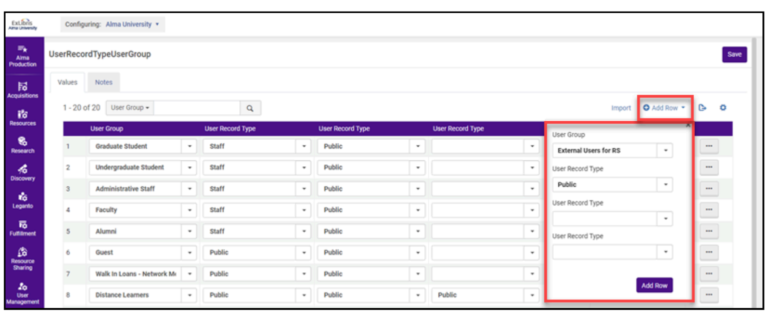
In order to enable self registration, a new User Group must be created. This is done by accessing **Configuration > User Management > User Details > User Groups** and selecting **Add Row**. Fill in the **Code**, **Description** and **Default Value** fields.

For more information, see User Details Configuration.



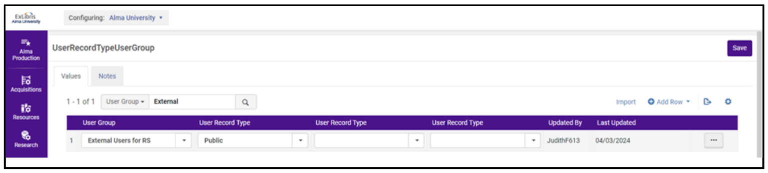
User Groups

After creating a User Group, a **Record Type** needs to be assigned to it. Go to **Configuration > User Management > User Details > User Record Type > User Groups**, select **Add Row** and choose the **User Record Type**. After finishing, select the **Add Row** button.



User Record Type

The User Group is now created.



Created User Group

Note

The patron role is not automatically added to the user, and it must be added manually.

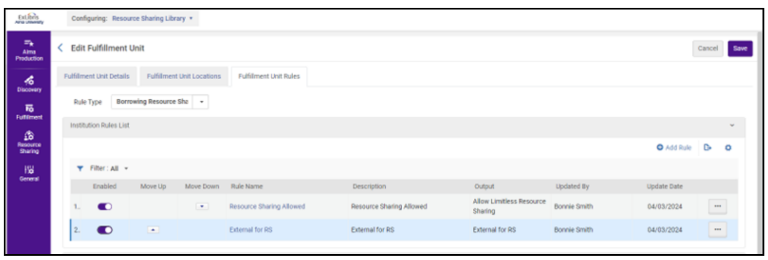
Assign Fulfillment Unit Rule

After the User Group has been created, the privileges need to be set. This is done in the relevant **Fulfillment Unit** rules page. In the Institution's library, find the Resource Sharing Library and change the Rule Type of Borrowing Resource Sharing.

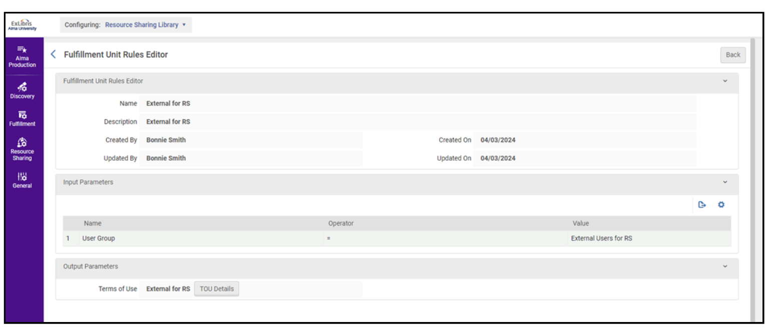
For more information, see Configuring Physical Fulfillment.

Note

You may need to create a rule for this user group.



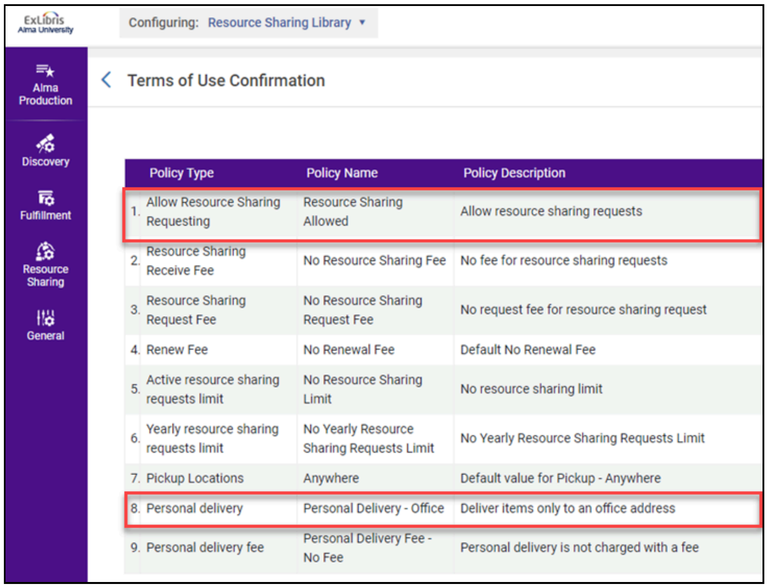
Fulfillment Unit



Fulfillment Unit Rules Editor

Define Terms of Use

The Fulfillment Unit Rule for the new user group must have a Terms of Use (TOU) with **Allow Resource Sharing Requesting** and **Personal delivery** policies.



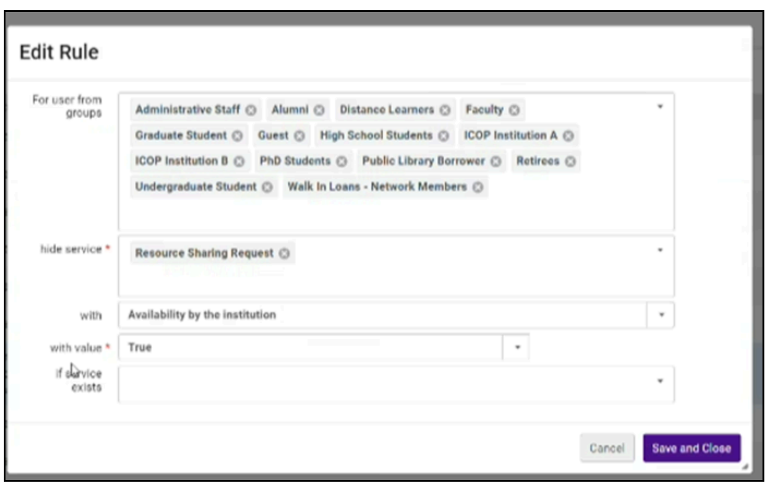
	Policy Type	Policy Name	Policy Description
1.	Allow Resource Sharing Requesting	Resource Sharing Allowed	Allow resource sharing requests
2.	Resource Sharing Receive Fee	No Resource Sharing Fee	No fee for resource sharing requests
3.	Resource Sharing Request Fee	No Resource Sharing Request Fee	No request 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 - Office	Deliver items only to an office address
9.	Personal delivery fee	Personal Delivery Fee - No Fee	Personal delivery is not charged with a fee

Terms of Use

Customize Display Logic Rules

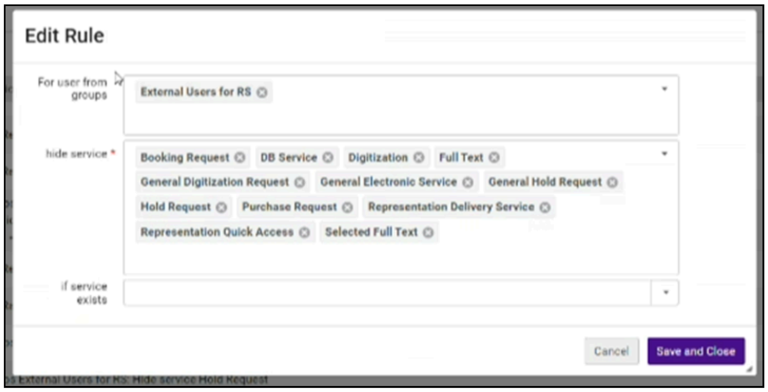
Finally, the **Display Logic Rule** must be set to determine what privileges the user group gets. It also determines what request options the user group has. To set the Display Logic Rule, go to **Fulfillment > Discovery > Discovery interface display logic rules.**

For more information, see [Configuring Discovery Interface Display Logic for Primo VE](#).



Display Logic Rule

The following is an example of display logic rules which enable the user to on place requests on the library's items. With the user group associated to the self registration functionality, these requests is created as lending requests within the library's lending task list.



Display Logic Rule Example

Enable Self Registration

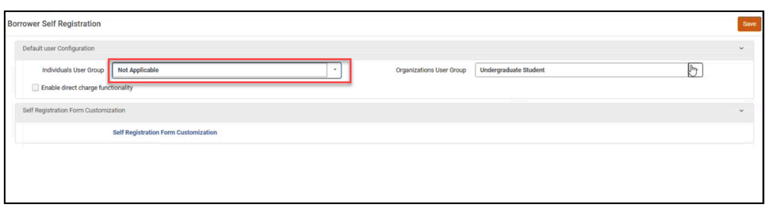
Note

After successfully creating a user group, self registration is now possible.

From (**Configuration > Resource Sharing > Configuration > Borrower Self Registration**), you can select which user groups are applied to the user record of self registration partner. Assign the newly created user group(s).

Note

If **Not Applicable** is applied to both types, the Self Registration option is not available.



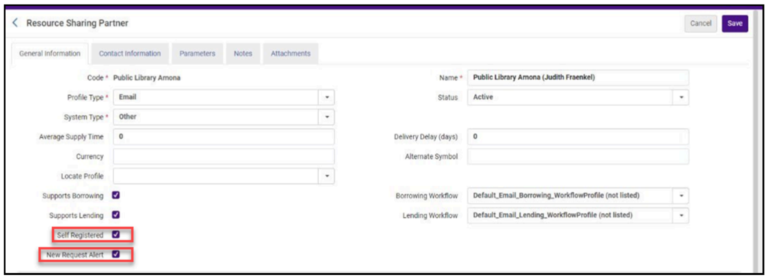
Self Registration Core Configuration

Alerts on Requests by Self Registered Users

In Configuration>Resource Sharing>Configuration>Manage Lending Alerts, New_Request_Created_For_Partner is enabled by default. Self Registered and New Requests Alert checkboxes are automatically selected on the newly created partner indicating that the partner was automatically created. You can deselect this on the new partner if you no longer want the alert to appear on requests from this partner. See Managing Lending Alerts. Alerts from these partners enables faceting and creating sets based on this alert.

Note

Alerts can be a set facet if you want to have a set to support your workflows.

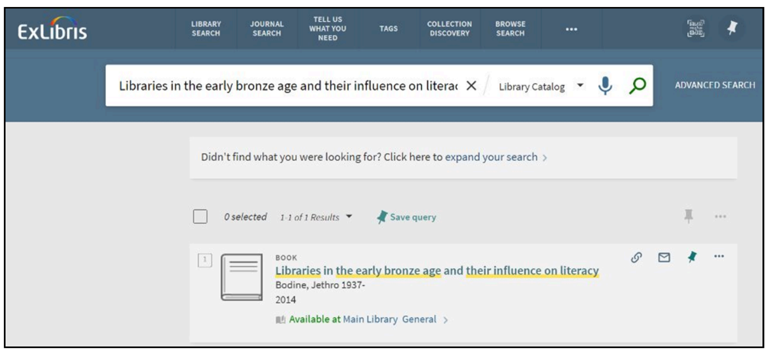


Alerts

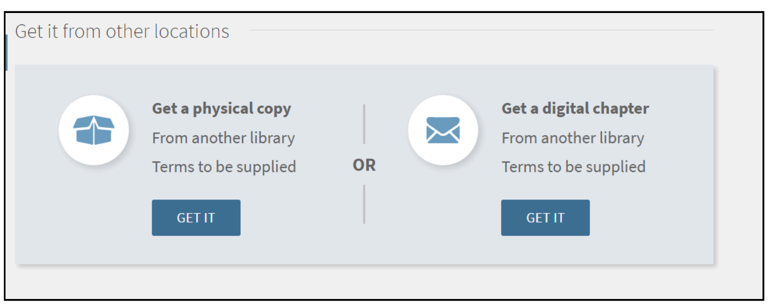
Note

The self registration request has the alert icon.

Now, once the partner record is created, through one of the means of creating self registered partners (See [Self Registered Partners via Discovery](), [Self Registration via Backend through Add Partner]() and [Enabling Self Registration Using API]()) they can login and a request can be placed in the Discovery.

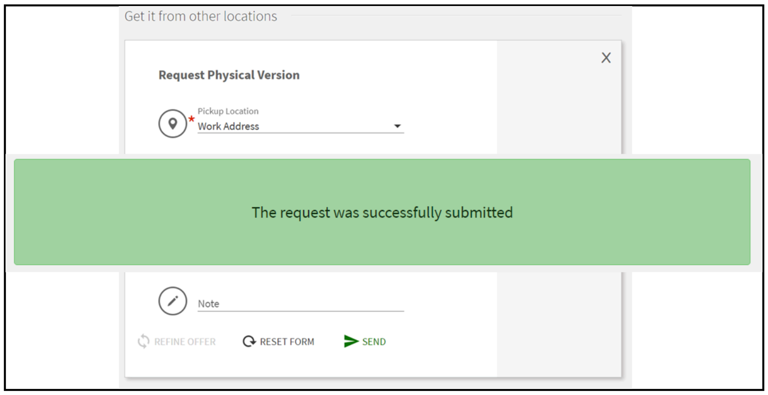


Discovery request



Get it from other locations

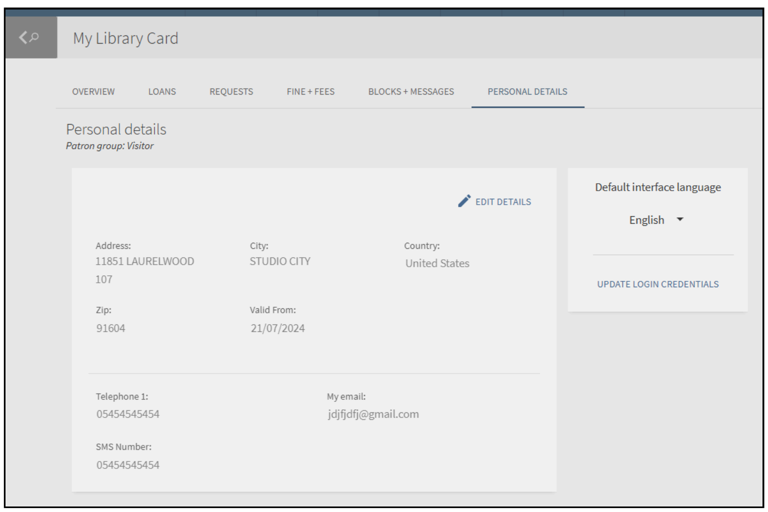
After the request has been successfully placed, a confirmation is received.



The request was successfully submitted

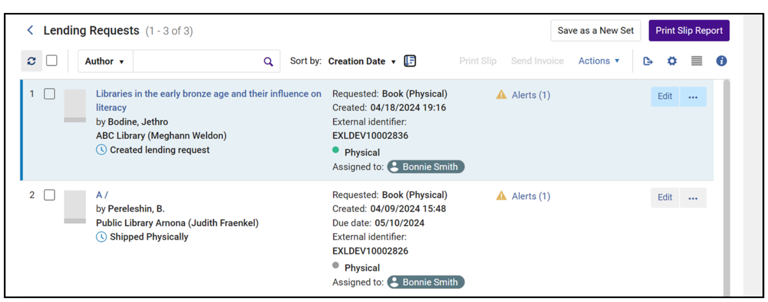
Contact Information:

Contact details provided in the partner record (address, email, phone) are automatically applied to the user account. This ensures that the user can view and update their personal details in Discovery under Library Card → Personal Details.



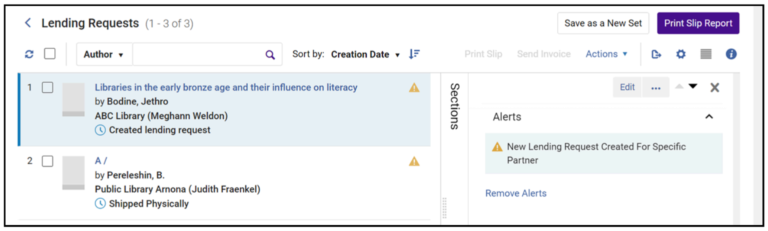
Library Card

The self registration request appears in your Lending Requests page.



Lending Request

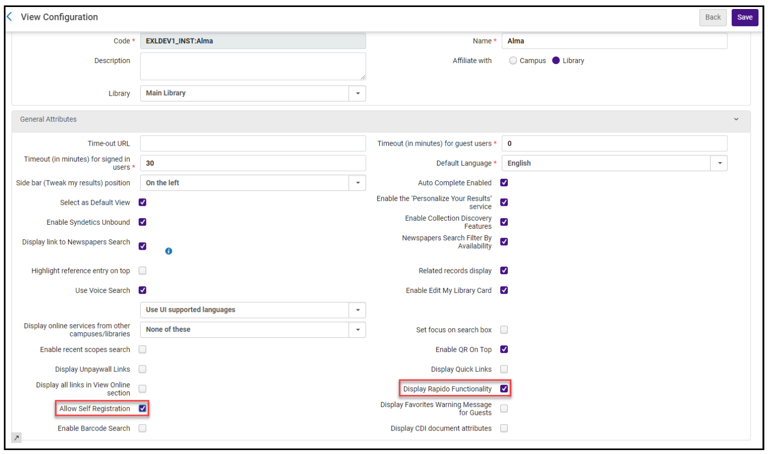
Finally, you can fill the request through your normal Lending workflow.



Lending Request Workflow

Self Registered Partners via Discovery

1. From the **General** tab (**Discovery > Display Configuration > Configure Views**), check **Display Rapido Functionality**. The **Allow Self Registration** checkbox is presented.

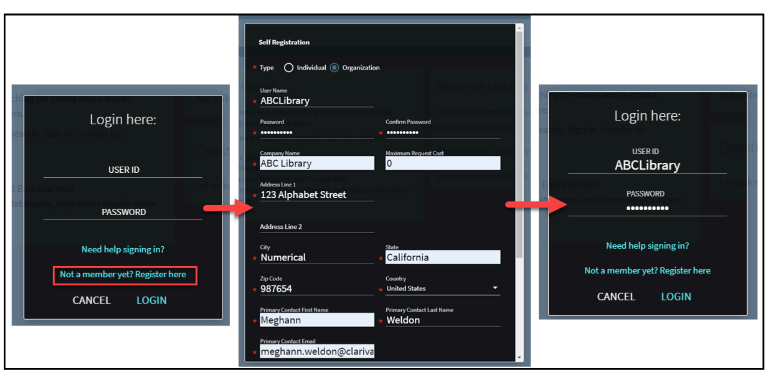


Display Rapido Functionality and Allow Self Registration options

2. When **Allow Self Registration** is selected, the login form presents the option of the **Not a member yet? Register here. This links to the registration** form.

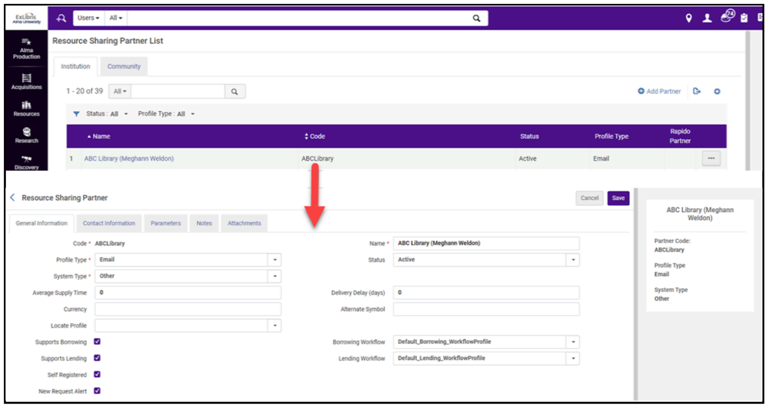
Note

The **Not a member yet? Register here** text and the form text can be customized from **Configuration > Discovery > Discovery Configuration > Labels > Rapido Self Registration Forms Customization**.



Self Registration form

3. Registrations via the form create the partner and user record.



Created Partner Record

Self Registration via Backend through Add Partner

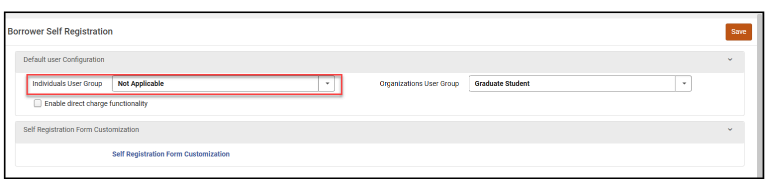
Rapido provides a workflow that allows library staff to perform self registration on behalf of other institutions directly from the backend. This feature is useful when institutions want to enable resource sharing without requiring partners to self register via Discovery. Staff can create the partner and corresponding user account, then share the login credentials with the partner by enabling the Welcome Partner Letter.

To enable backend self registration:

Ensure that **Borrower Self Registration** is configured to allow registration for Individuals and/or Organizations (**Configuration > Resource Sharing > Configuration > Borrower Self Registration**).

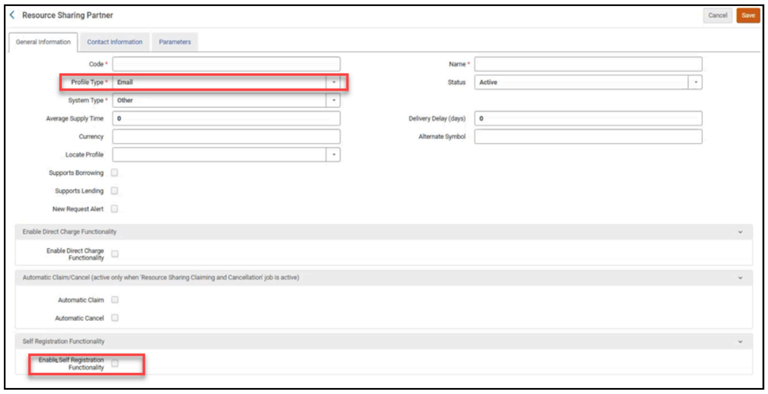
Note

If both user groups are set to Not Applicable, backend self registration is not available.



Borrower Self Registration

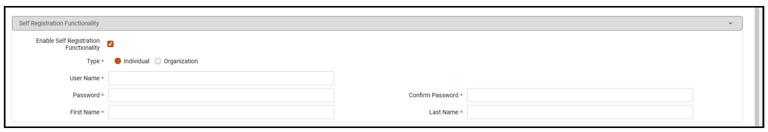
Once the self registration is allowed, when staff create a new Email partner (**Fulfillment > Resource Sharing > Partners**) the **Enable Self Registration Functionality** checkbox becomes available. Staff can select this option and choose between **Individual** or **Organization** for the **Type**.The form that opens populates the partner and user record.



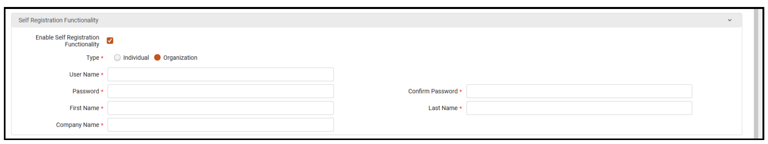
Enable Self Registration Functionality

Note

The user record is created with the information that is added to the partner record.



Self registration form for Type Individual

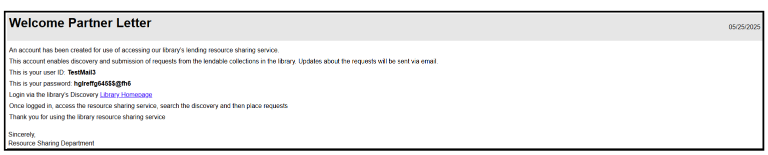


Self registration form for Type Organization

The partner receives the Welcome Partner Letter with their credentials for logging in and placing requests.

New Welcome Partner Letter

A new **Welcome Partner Letter** has been added to Rapido. For more information see, [Welcome Partner Letter](#).



Welcome Partner Letter 05/25/2025

An account has been created for use of accessing our library's lending resource sharing service.

This account enables discovery and submission of requests from the lendable collections in the library. Updates about the requests will be sent via email.

This is your user ID: **TestMail3**

This is your password: **hglreffg645$$@fh6**

Login via the library's Discovery [Library Homepage](#)

Once logged in, access the resource sharing service, search the discovery and then place requests

Thank you for using the library resource sharing service

Sincerely,
Resource Sharing Department

Welcome Partner Letter Example

Enabling Self Registration Using API

For more information on Resource Sharing Partners API, see [Resource Sharing Partners](#).

Rapido provides an option to enable self registration programmatically using the Rapido API. This feature is designed for institutions that want to allow resource sharing without requiring partners to register via Discovery or the backend interface. By using the API, institutions can create a partner and corresponding user account, enabling them to log in and place requests in discovery.

To enable self registration using API:

- Use the **Rapido Create Partner API** with the `self_registered_details` attribute.
- Ensure the partner profile type is set to **Email**.
- Include the following mandatory fields in `self_registered_details`:
    - **self_registered_type** – INDIVIDUAL or ORGANIZATION
    - **user_name** – Taken from the partner_code
    - **password** and **confirm_password**
    - **first_name** and **last_name** (for Individuals)
    - **company_name** (for Organizations)
- Provide contact information in the `contact_info` section of the partner object.

Creating a corresponding user:

When a self registered partner is created via the API, Rapido automatically creates a corresponding user account with the following details:

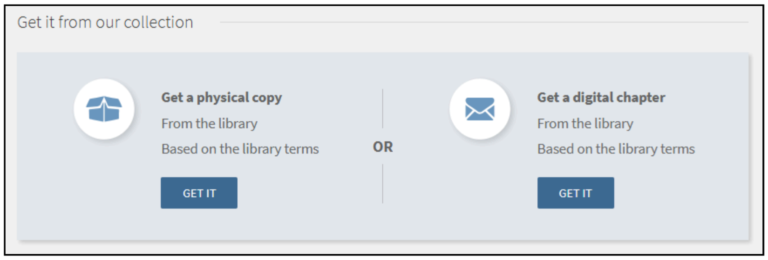
- **User Type**: Public
- **Role**: Patron
- Field mapping:
    - **Individual**: First Name → first_name, Last Name → last_name
    - **Organization**: First Name = first_name + last_name, Last Name = company_name
- The user can log in to Primo VE and place requests according to display logic rules.

Additional notes:

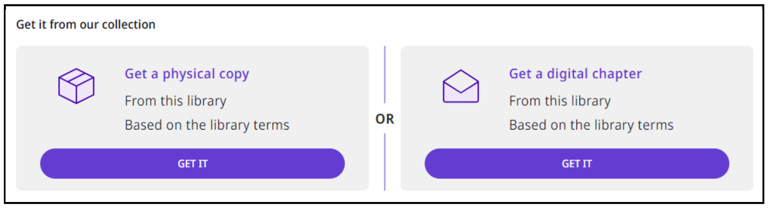
- Password and confirm_password must match.
- If partner name is empty:
    - **Individual:** Use First Name + Last Name
    - **Organization:** Use Company Name (with First and Last Name in brackets)
- On update, do not include self_registered_type, password, or company_name.
- Retrieve Partner API returns self_registered_details when self_registered_indicator = Y.

Customizing Rapido Tiles for Self-Registered Users

New for April! Rapido provides dedicated offer tiles for self-registered users, ensuring that these patrons see fulfillment options that reflect services available directly from their institution. The tile layout and labels are customizable, allowing libraries to present clear, library-specific messaging for both **Physical** and **Digital** requests. For more information on configuring these tiles, see Self-Registered Labels.



Primo VE Self-Registered User Tile

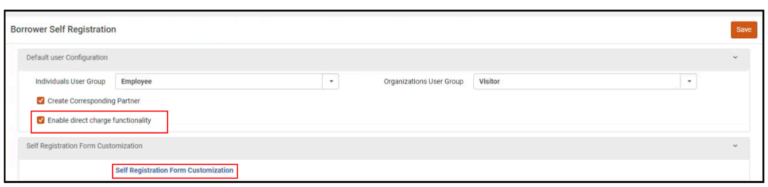


Primo NDE Self-Registered User Tile

Charging Non-Pod Partners

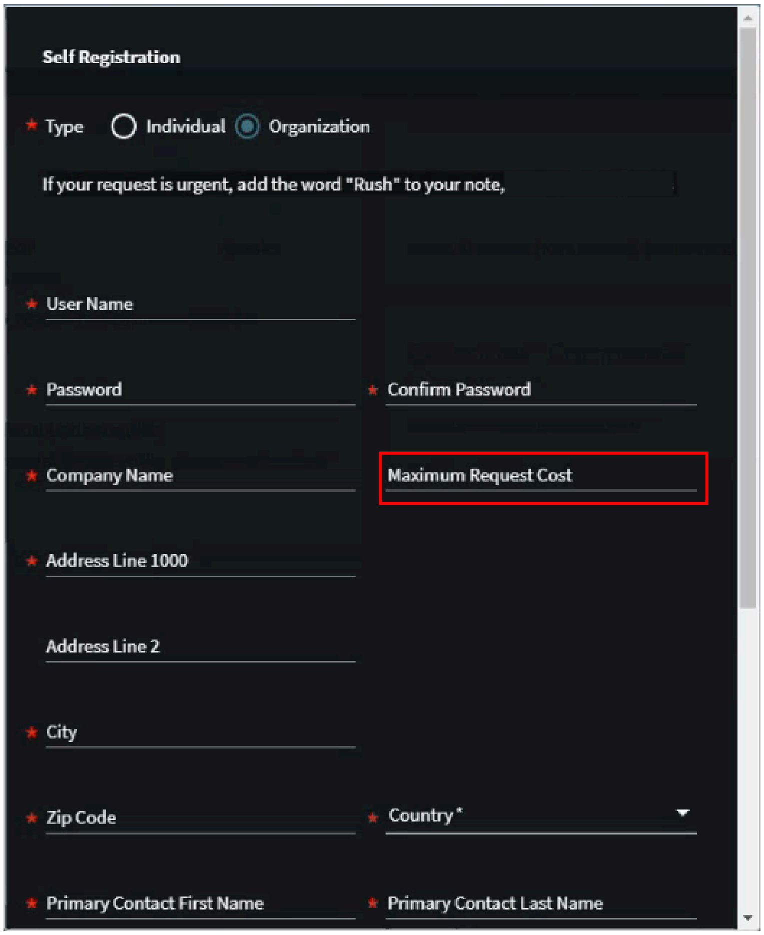
Enabling Direct Charge Functionality

Billing fields can be enabled or disabled on the **Self Registration Form Customization**. The **Enable direct charge functionality** must be checked on the Borrower Self Registration form (**Configuration > Resource Sharing > Configuration > Borrower Self Registration**) for the **Enable Direct Charge Functionality** section to be visible on the corresponding partners created by self registration. Additionally, the field names can be modified as necessary by selecting **Self Registration Form Customization**.



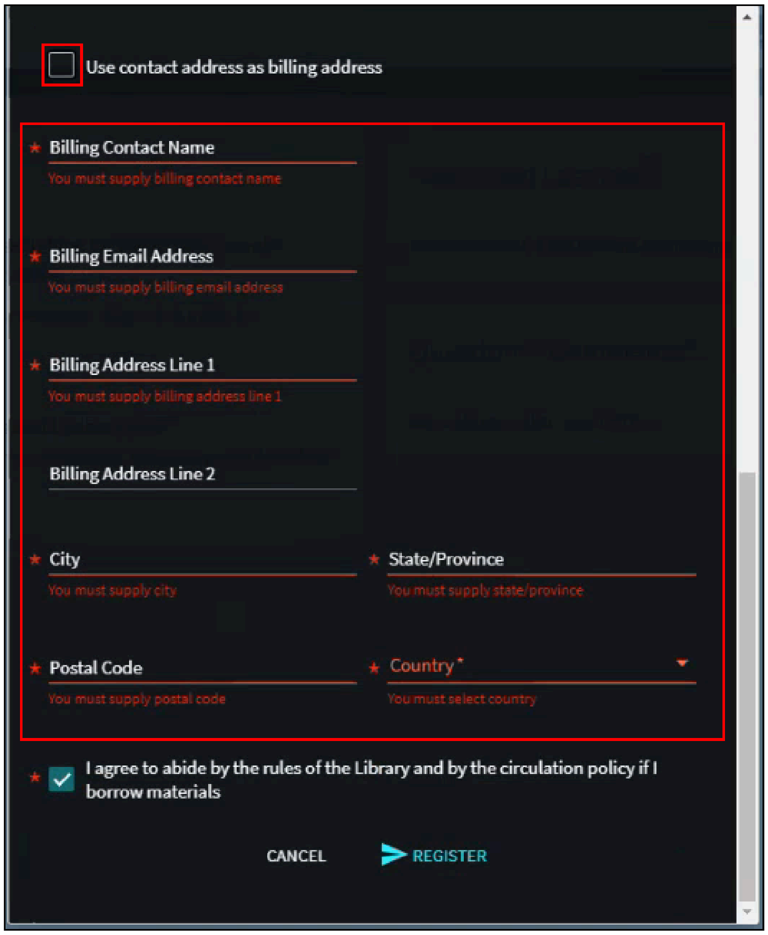
Self Registration options

When a **Maximum Request Cost** is added to the self registration form, these fields are then populated on the user's Resource Sharing Partner (**Fulfillment > Resource Sharing > Partners**) details.



Maximum Request Cost field

When the contact billing address is different than the contact address, users can deselect the **Use contact address as billing address** on the self registration form and then enter the relevant details for the billing address.

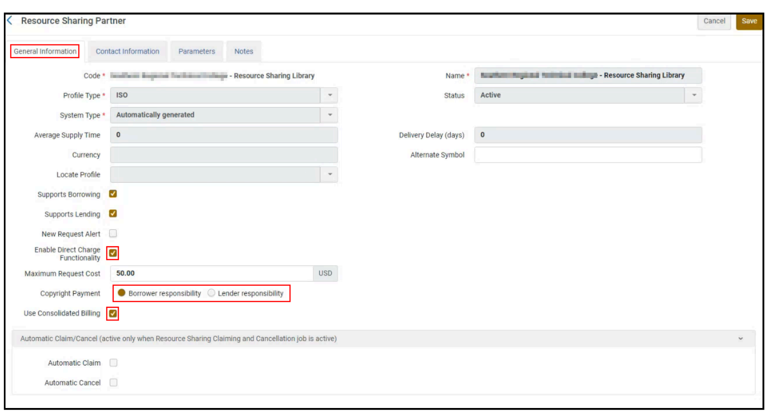


Contact billing fields

Configuring Copyright Billing Settings

To assist with copyright billing, the Resource Sharing Partner (**Fulfillment > Resource Sharing > Partners**) includes an **Enable Direct Charge Functionality** checkbox (default `unchecked`). When checked, library staff can set whether the borrowing or lending partner is responsible for the **Copyright Payment** when payments apply. **Borrower responsibility** is selected by default. The field enables the customer to explicitly request the lender to pay the copyright fee on their behalf and bill them for it, or to choose to handle the fee on their own.

Additionally, when the **Enable Direct Charge Functionality** checkbox is checked, library staff can check the **Use Consolidated Billing** checkbox to consolidate billing with this partner so that billing will occur monthly.



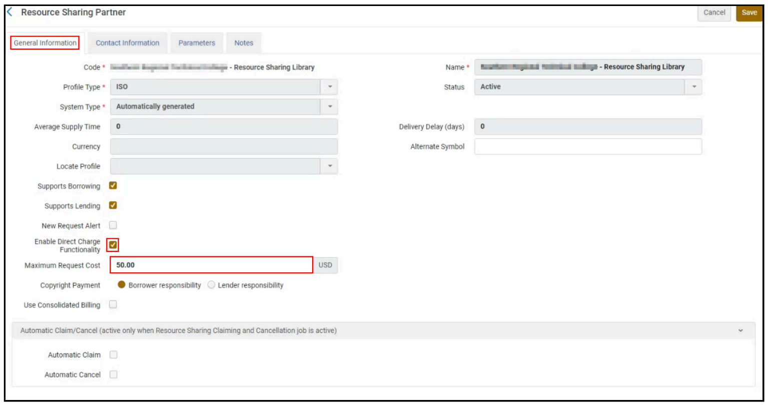
Copyright Payment and Use Consolidated Billing

Configuring Maximum Request Costs

Due to the wide variance of copyright fees, the Resource Sharing Partner (**Fulfillment > Resource Sharing > Partners**) now includes an **Enable Direct Charge Functionality** checkbox (default `unchecked`). When checked, library staff can configure a **Maximum Request Cost** to apply to borrowing requests. This field enables the requestor to apply the maximum cost they accept without additional approval. If no value is added, no limit is applied to the requests.

Note

Scanning for shipping is not supported when maximum costs are configured.



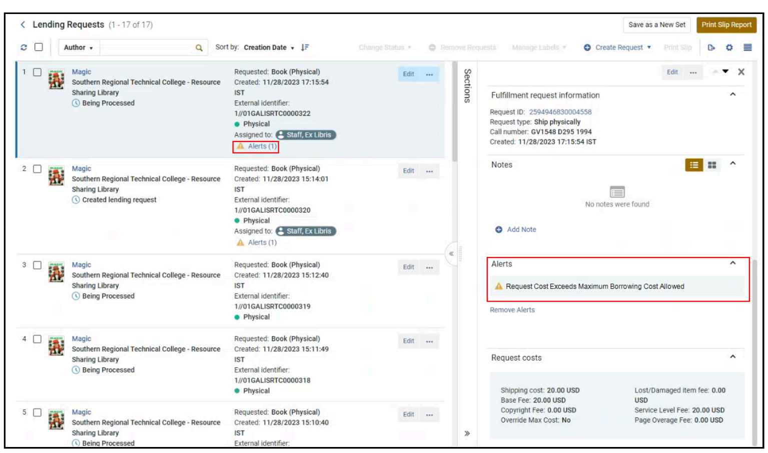
Enable Direct Charge Functionality

Note

The lending rules only apply to Rapido digital requests or non-Rapido physical and digital requests. Physical Rapido requests apply the policy terms.

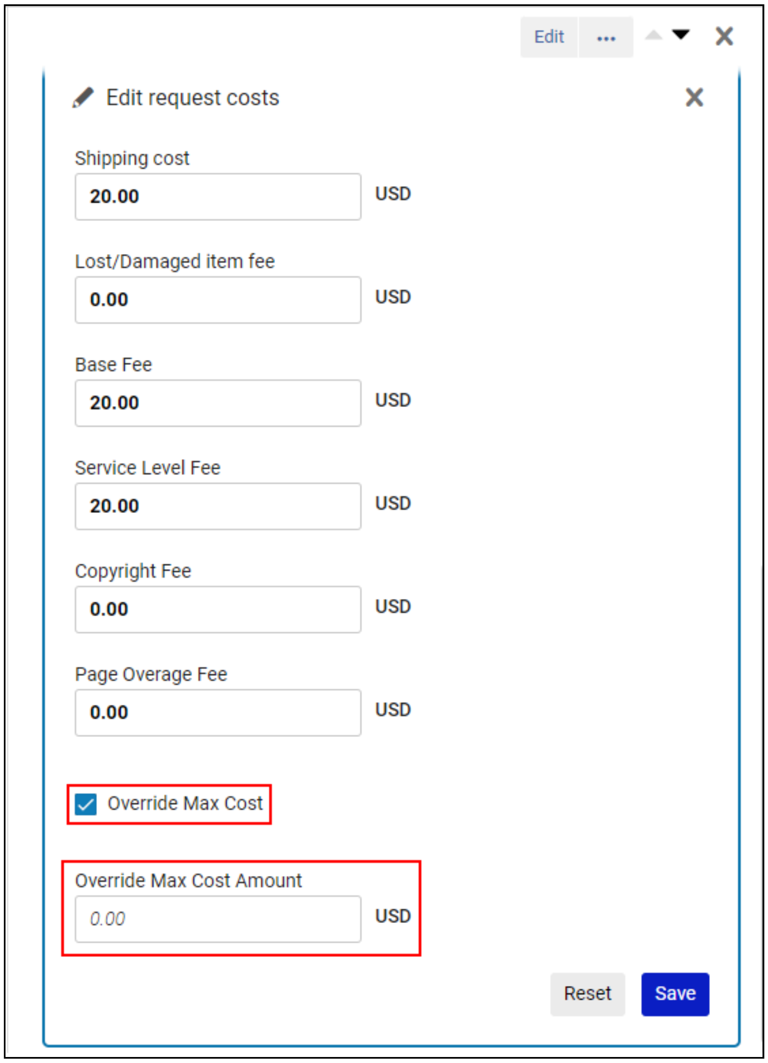
Note

When changes are made to a request, the lending rules only apply when the changes are saved.



Alert: Request Cost Exceeds Maximum Borrowing Cost Allowed

If an alert is removed, the **Override Max Cost** checkbox is automatically checked, and the **Override Max Cost Amount** remains at zero. Therefore, no limit is applied.



Override Max Cost

Partners

Configuring a Resource Sharing Partner

Establishing New Partners

The **Find partners** action finds partners who are in the directory and have enabled data sharing (See Data Sharing Profile). For more information, see Finding Partners.

These institutions can also be found in the **Community** tab (**Fulfillment > Resource Sharing > Partners**), where they can be copied to your partner list on the **Institution** tab.

For more information, watch Find Partners.

Additionally, the partner also needs to enable you as a resource sharing partner (**Fulfillment > Resource Sharing > Partners**).

To add a resource sharing partner:

1. Select **Add Partner**.
2. Enter a partner **Code**.
3. Select a **Profile Type**.

Note

Email partners must be configured with an `Email` **Profile Type**.

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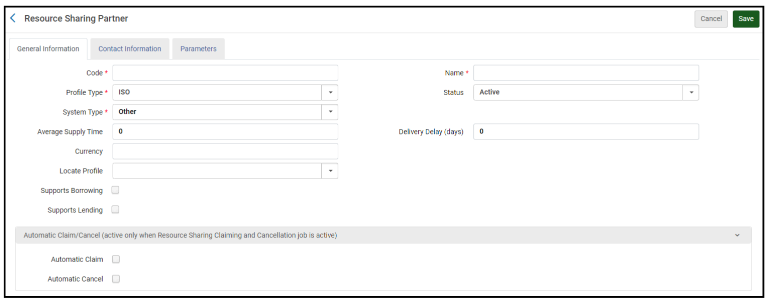
4. If necessary, select a **System Type**.
5. Enter a partner **Name**.
6. Configure any other relevant fields/checkboxes/dropdown lists.
7. Select **Save**.



Add Resource Sharing Partner

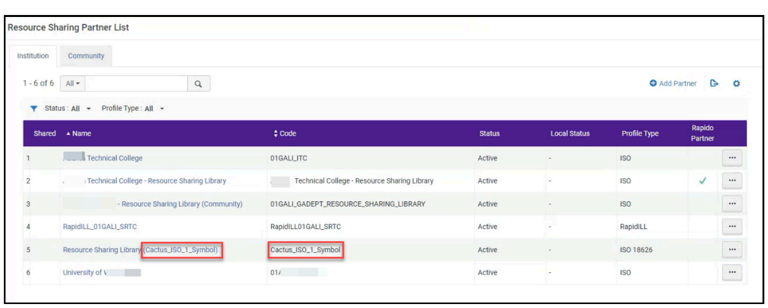
Note

Peer-to-peer requests sent outside of a pod do not use pod terms. Instead, the fulfillment unit rules determine the lending terms.

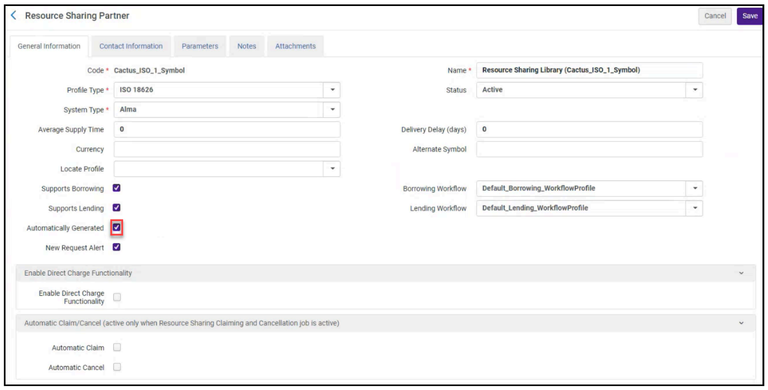
Creating Borrowing Partners Automatically

For lenders who receive borrowing requests from partners who do not share the same pod, or the request is not a Rapido request, borrowers can now be created automatically. When the parameter **rapido_automatically_create_partner** (**Configuration > Resource Sharing > General > Other Settings**) is `true` (default `false`), borrowing partners are automatically created for requests that are not Rapido requests and the partners do not share a pod. These automatically generated partners are only available for ISO 18626 and NCIP P2P.

An **Automatically Generated** checkbox is included on these partners to indicate that this partner was generated automatically, and the checkbox is not editable. The automatically generated partners are named with the ISO symbol in parenthesis and the ISO symbol is used for the partner code.



Auto-generated partner



Automatically Generated indicator

If any required information is missing from an auto-generated partner, an alert is added to the request to indicate that information is missing that will prevent the request from being filled.

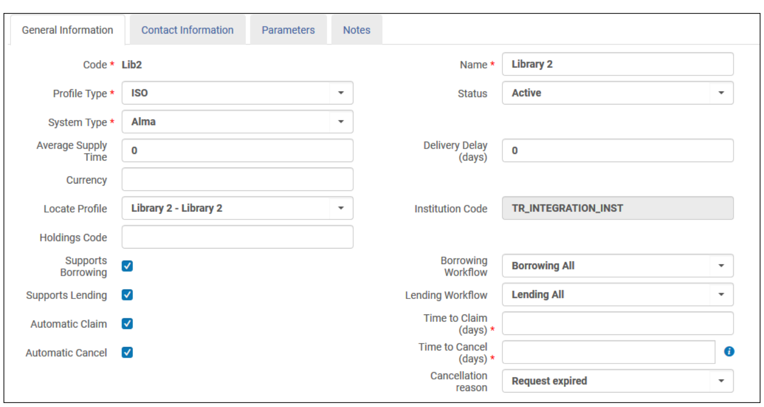
Configuring a Resource Sharing Partner

To configure a resource sharing partner:

1. From the Resource Sharing Partner List page (**Fulfillment > Resource Sharing > Partners**), select **Add Partner**. The Resource Sharing Partner page opens to the **General Information** tab.

Note

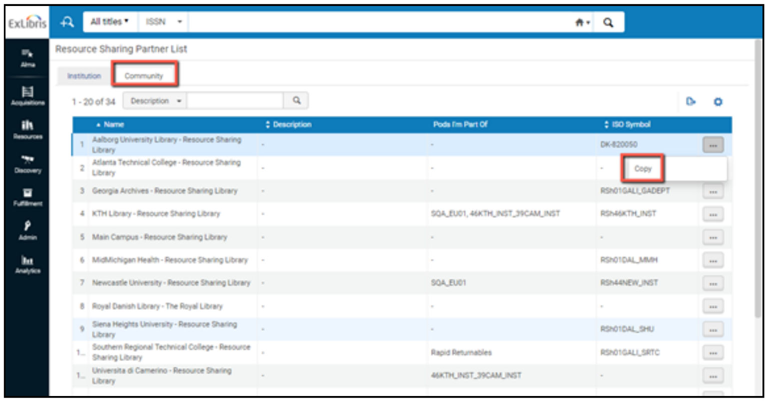
In order to add partners of **Profile Type** `Fulfillment Network`, you must first add a dummy entry to the **Fulfillment Members** table (**Configuration > General > Network Groups > Fulfillment Member**). Only then can you add the partners to the **Fulfillment Networks Groups** page (**Configuration > General > Network Groups > Fulfillment Network Groups**). Once you have set up all the Partners in the Network Zone, you can either leave that dummy entry in the **Fulfillment Members** table in the Network Zone or delete it. If you decide to delete it, the partners are displayed as **Profile Type** `Fulfillment Network (Not Listed)` in the **Fulfillment Partners** table, but they are functional as Fulfillment Network partners.



General Information

Note

Users can add a partner record using the Resource Sharing Directory. Use the **Community** tab to look for the partner record you want to create and select **Copy**. The copied record appears in your **Institutions** tab as one of your local partner records and can be freely updated and used in one of your rota templates.



Community tab

2. Enter a code and name for the resource sharing partner. Note that the code can contain only alphanumeric characters.
3. In the **Profile type** field, select the type of protocol you want to create. Options are:
   - **ARTEmail**
   - **BLDSS**
   - **Email**
   - **External System**
   - **Fulfillment Network**
   - **Inn-Reach API**
   - **ISO**
   - **ISO 18626**
   - **KERIS**
   - **NACSIS**
   - **NCIP**
   - **NCIP-P2P**
   - **RapidILL**

     Note

     - Add a prefix to the ISO symbol in the messages by checking the checkbox **Add Institution Symbol Prefix** in the **Partner** parameter tab (**Fulfillment > Resource Sharing > Partners**).

   - **SLNP**

Note

The ISO parameters are the same for ISO ILL 10160/10161 and ISO 18626.

4. Optionally, select **Inactive** from the **Status** dropdown list if you do not want the partner to be active.

Note

The status affects only peer-to-peer requests, such as ISO, but does not affect broker-managed requests such as NCIP. NCIP requests are still received even if an NCIP type profile is marked inactive.

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5. Select the resource sharing system with which you are integrating from the **System type** dropdown list (for Ex Libris' informational purposes). This is mandatory.

   For a profile with an External System profile type, select **CCC GetItNow** as the System Type (this is the default).

   When an NCIP profile is configured, the indicated broker types must be configured with the following NCIP parameters in the partner **Parameters** tab:

Additional Configurations	Description
Relais	**Request pushing method = OpenURL** The URL is defined as follows, where the XXX and YYY values are provided to each institution by Relais: `https://h7.relais-host.com/<XXX>/loginRFT.jsp?LS=<YYY>` **Add User to Login = Yes** **Enable Service for Guest User = No** **Loan Period** = <Free text, which is displayed in the Get It tab>
OCLC Navigator	**Request pushing method = Link** The Navigator system cannot receive an OpenURL as input; the configurable link can only be a static link. To configure a dynamic link to the Navigator system, use General Electronic Services (see Adding a General Electronic Service). **Enable Service to Guest User = Yes** Navigator requires a new login when being accessed. **Loan Period** = <Free text, which is displayed in the Get It tab>
INN Reach	**Request pushing method = Link** General Electronic Service creates a link with an OpenURL template, as described in Adding a General Electronic Service. **Enable Service for Guest User = No** INN Reach does not trigger an authentication process, as authentication is expected to have taken place before accessing the INN Reach request form. **Loan Period** = <Free text, which is displayed on the **Get It** tab>
ILLiad	**Request pushing method = Link** General Electronic Service creates a link with an OpenURL template, as described in Adding a General Electronic Service. **Add user login to URL = No** ILLiad requires logging in again **Enable service for guest user = Yes Loan Period** = <Free text, which is displayed in the Get It tab>

Additional Configurations	Description
	The configured brokers display as links on the Primo **Get It** tab. For more information about brokers in the **Get It** tab, see More Information About Resource Sharing Broker in Get It. **General Electronic Services -** Displays a Primo link to an external service (such as Amazon), as an additional way to retrieve resources. You can also create rules to assign different links to be used for different resources (such as for a book or DOI). For details, see Adding a General Electronic Service. **Display Logic Rules -** Indicates when a certain broker link will display or be hidden in Primo (see Configuring Display Logic Rules).

6. Enter values in the **Average supply time**, **Delivery delay**, and **Currency** fields.

7. Select the **Supports borrowing** and/or **Supports lending** checkboxes. The workflows selected here control the actions that can be performed on the borrowing and lending request task lists for the defined partner.
   Choose one of the workflows from the dropdown list predefined by an administrator (**Configuration > Fulfillment > Resource Sharing > Workflow Profiles)**. For details on configuring workflow profiles, see Configuring Workflow Profiles.

8. In the **Delivery delay** field, enter the number of days required to deliver the item. The due date calculated when the received item is loaned to the requesting patron is automatically advanced by the number of days indicated in this field.

   For example, if the due date when receiving the item is June 5, 2013 and **Delivery Delay = 4**, the **Due Date** value displays on the Patron Services page as June 1, 2013, to allow 4 days for item delivery and ensure that the item arrives by its actual due date of June 5.

   For more information about managing the due date for an interlibrary loan, see the Interlibrary Loan With Due Date video (7:01 mins).

9. The **Local Status** field appears for institutions that centrally manage their partner records in the Network Zone. It enables an individual institution to locally deactivate a partner record even though the partner is active for the collaborative network.

10. In the **Locate profile** field, select a locate profile to determine how the partner's catalog is to be searched. The **Holding code** and **Institution Code** fields appear. **Institution Code** is a display field that shows the institution code that is configured for the selected locate profile. This field must be populated in order to use links (rather than attachments) for the digital shipment of a resource sharing request if the institutions are not part of the same network zone. For details on locate profiles, see Configuring Locate Profiles and Configuring Copyright Management.

11. If an incoming NCIP message cannot identify the partner, the NCIP partner that has the **Default Partner** checkbox selected is used.

12. In the **Holding code** field, enter a library or campus code. The locate process for the partner searches the library/campus indicated by the value in this field. Specifying a holdings code enables you to:

    - Determine whether a requested resource is available at a specific campus of a potential supplier.
    - Request the resource from that lender only if the resource is owned at the requested campus.

13. For peer-to-peer partners, selecting the **Automatic Claim** field enables the **Time to Claim (days)** field. This triggers an automatic claim letter (RSBorrowerClaimEmailLetter) when a configured period of time is reached. For example, when the **Automatic Claim** checkbox is selected and the **Time to Claim (days)** field is set to 7, if a request was sent 7 days ago and the request's status is still **Sent**, a claim letter is automatically triggered and the request status is set

to **Claimed**.

14. For peer-to-peer partners, selecting the **Automatic Cancel** field enables the **Time to Cancel (days)** and **Cancellation Reason** fields. The cancellation uses the same workflow as the manual cancel partner option and sends an automatic cancelation notification to the partner and continues through the rota.

Note

For the cancelation and claim action to take place, you must activate the Resource Sharing Claiming and Cancelation job using the Fulfillment Jobs Configuration page. See Configuring Fulfillment Jobs.

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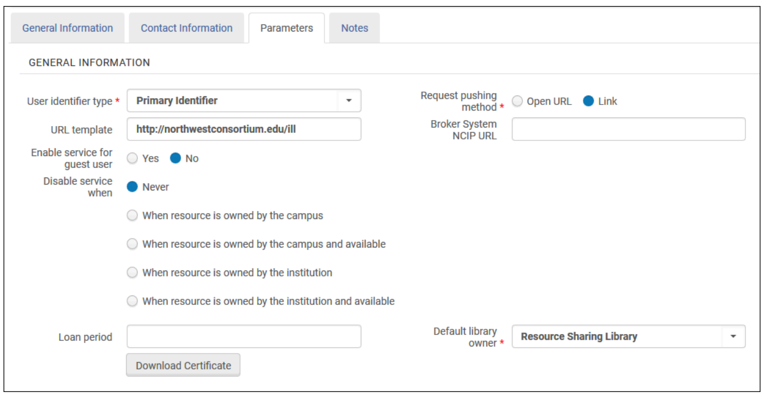
15. In the **Contact Information** tab, add an address, phone number, and email information for the resource sharing partner (for informational purposes only; information for sending the resource sharing request is entered in the **Parameters** tab – see the following step). For instructions, see Adding User Contact Information.

16. In the **Parameters** tab, configure the resource sharing parameters. For more information, see Partner Parameters below.



Resource Sharing Partner Page – Parameters Tab

17. Select **Save**. The resource sharing partner is created and appears on the Resource Sharing Partner List page.

    The partner can then be selected from the **Partner** dropdown list (accessible when selecting the **Edit**, **Duplicate**, or **Send** options on the Resource Sharing Borrowing Requests page) or **Supplied to** drop-down list (accessible when selecting the **Edit** or **Duplicate** options on the Resource Sharing Lending Requests Task List page).

Note

A **Notes** tab is available when editing the resource sharing partner (**Actions > Edit**).

For more information, see Broker-Based Resource Sharing.

Customizing Partner Fields

Additional fields can be configured in the **Resource Sharing Partner** record (**Fulfillment > Resource Sharing > Partners**) that allow libraries to customize and expand the partner information.

Partner Fields

Field	Description	Configuration	Additional Information
Partner Account Allowances	Populated by customizable drop-down options, multiple selections can be made to designate additional partner information.	**Configuration > Fulfillment > Resource Sharing > Partner Account Allowances**	Define the uses the partner is allowed to make with the supplied material. Multiple values are allowed in this field, separated by semicolons (**;**). This field is optional.
Partner Sectors	Populated by customizable drop-down options to allow for additional information to be stored on the partner record.	**Configuration > Fulfillment > Resource Sharing > Partner Sectors**	Defines the sector to be used for analytics reporting of filling requests per sector type. This field is optional.
Partner Organization Type	Populated by customizable drop-down options to allow for additional information to be stored on the partner record.	**Configuration > Fulfillment > Resource Sharing > Partner Organization Type**	The partner organization type. Partner Organization Type is an attribute in the Configuration Shipping Cost Lender Rules.

Broker Connection Parameters

ARTEmail Parameters

Enter the ARTEmail email address. In addition, for each customer ID you add, you must enter a code and password. Optionally, if you want to enable the ability to send requests to an alternate physical location or email address (which you can select to do in the Request Attribute section of the Creating a Borrowing Request page), you may select the **Supports ADD request** checkbox. You may also select keyword codes to include which are request values. (Refer to the British Library's Guide to ARTEmail for an explanation of these values.) These define the communication that is possible with the resource sharing partner.

NCIP Parameters

Configure parameters as described in the following table:

NCIP Parameters

Section	Field	Description
General Information	User identifier type (Required)	The identification type used to match users when a message contains a user ID. Select one of the options predefined by an administrator. See Viewing Additional User Identifier Types.
	Request pushing	Select the type of link — **OpenURL** or **Link**—that is used to push the request into the resource sharing system. If you select **OpenURL**, the **Add user auto login to URL** field appears.

Section	Field	Description
	method (Required)	
	URL template	The URL that is used to send patrons from Primo to the resource sharing library's Web site.
	Broker System NCIP URL	The URL to communicate with the NCIP broker.
	Add user auto login to URL	Select **Yes** to add a user's login credentials to the URL, thereby logging the user in automatically upon accessing the URL. This field displays only when **Request pushing method = OpenURL**. Select **Yes** when configuring integration with a Relais system (see Configuring Alma/Broker Integration).
	Enable service for guest user	Indicates whether the link to the partner appears in Primo when the patron is not logged in.
	Disable service when	Select the parameters upon which the service is to be disabled. Possible values are: • **Never** – The service is never disabled. • **When resource is owned by the campus** – The service is disabled when physical items for the resource are owned by the campus. • **When resource is self-owned by campus and available** – The service is disabled when physical items for the resource are owned by the campus and are available (that is, they are not involved in a process). • **When resource is owned by the library** – The service is disabled when there are physical items for the resource that are owned by the library. • **When resource is owned by the library and available** – The service is disabled when there are physical items for the resource that are owned by the library, are in place, and are in an open location. **Note** When a guest user or a user without a configured campus performs any of the campus-level disabling activities, Alma disables/hides the service based on a self-ownership check done on the institution level.
	Loan period	The amount of time the user has before having to return the item to the resource sharing library. (This may be seen by patrons in Primo.)
	Default library owner	The resource sharing library that manages the borrowing request created by this profile.
	Download Certificate Button	This button is used to authenticate the TCP communication for encrypted messages sent to Alma using the SLNP protocol. The button appears for NCIP partners after the partner has been saved the first time. **Note** Each click on this button creates a "new" certificate and therefore can break encryption if that new certificate is not immediately installed on the partner side.

Section	Field	Description
		For more information on the certificate, see the [Developer Network]().
Request Item An NCIP message is sent when a lending request is registered on the borrowing side.	Resource sharing library	The single resource sharing library that is supported for all actions. Select from a list predefined by an administrator.
	Bibliographic record ID type	Select a parameter by which resource sharing requests are to be searched. Possible values are: • OCLC Control Number • MMS ID • LCCN • ISBN_ISSN • Taken from message – Indicates that the bibliographic record ID type is to be taken from the NCIP message sent by the partner. The relevant value is one of the other values available in this field and is taken from the **BibliographicRecordIdentifierCode** tag in the message.
	Support Borrowing	Use if the broker system notifies Alma about new borrowing requests at the time they are created using the Request Item NCIPmessages. Most broker systems do use this message to notify a borrower about a new borrowing request. Rather, the message is used at the point when the item is received. Leave the checkbox unselected, unless you are sure that your broker system also uses the Request Item message for notifying about new borrower requests.
Check Out Item An NCIP message is sent when an item is shipped from the lending side to the borrowing side.	Default library (Required)	The resource sharing library to use as the default, if there are multiple resource sharing libraries.
	Default location (Required)	The temporary location at the resource sharing library that is assigned to an item that is shipped to a resource sharing borrower. Select from a list predefined by an administrator.
	Default item policy (Required)	The policy that is attached to an item that is shipped to a resource sharing borrower. Select from a list predefined by an administrator.
Accept Item An NCIP message is sent when the arrival of an item is registered on the borrowing side.	Default location (Required)	The temporary location at the receiving library. Select from a list predefined by an administrator. This location is assigned to an item that is shipped to a resource sharing borrower, unless a different location has been assigned by a Temporary Item Creation Rule.
	Resource sharing library	The resource sharing library, if there are multiple resource sharing libraries.
	Default pickup library	The default pickup location to which temporary items are transferred when an item arrives for a borrowing request. Select from a list of libraries predefined by an administrator.
	Automatic receive	Select to enable receiving resource sharing items automatically. Automatic receiving enables staff to register a Receive action in the broker system, without having to repeat the Receive action in Alma. Enabling this option allows multiple AcceptItem requests to be processed for a single multi-item

Section	Field	Description
		borrowing request. This is applicable if the requests contain the same request ID but different barcodes and the request ID is active. If the option is not enabled, multiple requests will be created with the same request ID.
	Receive desk	Select a desk at which the item is to be received. The available options are the desks of the library that is specified in the **Default library owner** field. The value you select indicates the location where the item arrives when the AcceptItem message is received. This field displays only when **Automatic receive** is selected.
Look Up User An NCIP message is sent when a patron attempts to create a request at the resource sharing system.	Require authentication	Select whether authentication should or should not be required for the resource sharing library's website. When working with a Relais broker, select **No**.
Export to Third Party	Export to third party	Used for ILLiad, Tipasa, Worldshare ILL, and Relais. See Rapido and ILLiad; Tipasa, Worldshare ILL, and Relais Parameters below.
Create User Fiscal Transaction A received NCIP message can create a request fee.	Create fee using	• **Ignore Message** — The message amount should be ignored. The charges for request fee and creation and receive fee will be done by the AcceptItem message (current functionality). This is the default value in order to keep prior functionality. • **Amount from message** — Create the fee with the value received in the message. • **Calculate percentage from message** — Create the fee as a percentage of the value received in the message. When this value is selected, the Percentage Amount field is displayed and is mandatory. Enter the percentage of the value received in the message that creates the fee. • **Amount from TOU** — Use the Borrowing Resource Sharing Terms of Use to calculate the fee. When the NonReturnableFlag is present, the digital format is used as input. When the flag is not present, the physical format will be used as input.

Note

You must also configure the following parameters on the NCIP partner:

- The NCIP URL, in the following format: `https://<Alma domain>/view/NCIPServlet`
- The AgencyID, which is your Alma institution code
- The ApplicationProfileType, which is the code defined on the Resource Sharing Partner page (see step 2 above)

NCIP Peer-to-Peer Parameters

- **Supports ADD request** – Select this box if you want to enable the ability to send requests to an alternate physical location or email address (which you can select to do in the Request Attribute section of the Creating a Borrowing Request page).
- **User identifier type** – The identification type that will be used to match users when a message contains a user ID.

Select one of the options predefined by an administrator. See Managing User Identifiers.

- **Server** – Enter the partner's server name (or IP address).
- **Institution code** – Enter the partner's Alma institution code.
- **Partner symbol** – The symbol by which the ILL partner is referred. The symbol must be unique to all other partner and ISO symbols. This includes NCIP-P2P, SLNP, and ISO partners.
- **Request Expiry** – Configure when the partner's lending settings expire. Choose from the following:
  - **No expiry** – The request does not expire
  - **Expire by interest date** – The request expires on the date specified in the **Needed by** field on the Resource Sharing Borrowing Request page (displayed when creating a borrowing request).
  - **Expiry time** – The **Expiry time** field appears, where you enter a number. This value indicates the number of days after the request has been sent to the lender that the request expires.
- **Send requester information** – Select this option to enable requests sent using the specified partner to contain information about the requesting patron, such as their name and email. It is recommended to select this option only if the third-party system requires this information in order to properly handle the request.
- **Shared barcodes** – Select to enable sharing item barcodes between lending and borrowing institutions.
- **Email Address** – Used for sending overdue notifications.
- **Resending Overdue Days Interval** – A whole number that indicates the number of days for recurring overdue notifications.

An additional option available for NCIP peer-to-peer configuration is the **Lookup Agency** button. Selecting this button contacts the partner and returns their supported protocol or other information the partner wishes to transmit to assist in the partner configuration process. You may also set your institution's information that will be transmitted to other partners by customizing the **resource_sharing_protocol** parameter of the Fulfillment mapping table. For information on modifying this value, see Configuring Other Settings.

NCIP peer-to-peer supports sending a general message to the partner institution.

ISO Parameters

Note

- Alma supports the following ISO Resource Sharing messages: **ILL Request**, **Shipped**, **Received**, **Returned**, **Checked-In, Answer – Unfilled, Cancel/Cancel Reply,** and **General Messages**.
- ISO partners can fulfill digital resource sharing requests using the link document delivery option.
- The ISO parameters are the same for ISO ILL 10160/10161 and ISO 18626.

- **Supports ADD Address** – Select to include the requester's email in the ILL request, enabling the lending partner to send the shipped resource directly to the requester.
- **Server** – the partner's server or IP address. If the partner also uses Alma, use the Alma domain (see Logging Into and Out of the User Interface) as the server.
- **Port** – the partner's ILL port number. If the partner also uses Alma, this is port 9001.
- **ISO symbol** – the symbol by which the ILL partner is referred. The symbol must be unique to all other partner and ISO symbols. This includes NCIP-P2P, SLNP, and ISO partners.
- **Request Expiry** – configure when the partner's lending settings expire. Choose from the following:

    - **No expiry** – The request does not expire
    - **Expire by interest date** – The request expires on the date specified in the **Needed by** field on the Resource Sharing Borrowing Request page (displayed when creating a borrowing request).
    - **Expiry time** – The **Expiry time** field appears, where you enter a number. This value indicates the number of days after the request has been sent to the lender that the request expires.
- **Send requester information** – Select this option to enable requests sent via the specified partner to contain information about the requesting patron, such as their name and email. It is recommended to select this option only if the third-party system requires this information in order to properly handle the request.
- **Shared barcodes** – Select to enable sharing item barcodes between lending and borrowing institutions. If both the lending and borrowing partners have this option selected, the lending library sends a barcode with the **Shipped** message, and the borrowing library uses the **Shipped** message to determine the lender item's barcode. The barcode displays as the **Temporary Barcode** value on the Receiving Items page (displayed when selecting **Receive** for a borrowing request), and can be used for identifying the received item when accessing the Received Items page (see Receiving Items).
- **Ignore Lender Shipping Cost** – Select this checkbox to use the borrower's set cost. When the checkbox is not selected, the lender-side costs override the borrower's cost. Note that when the checkbox is not selected, the borrowing institution's cost is overridden even if the lender has not communicated a cost value, i.e. it is considered as if a value of 0 is communicated to the borrower.
- **Resending Overdue Days Interval** – A whole number that indicates the number of days for recurring overdue notifications.

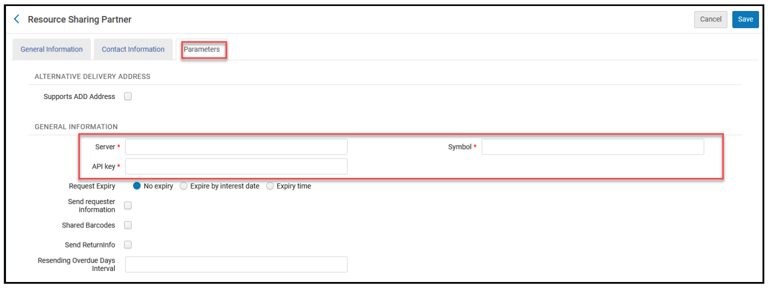
Peer-to-Peer Partner Parameters

Note

Some Ex Libris resource sharing customers have inquired about integration with OCLC resource sharing products through the open standard, ISO 18626. This integration is not currently supported and therefore, this integration cannot be implemented until further notice. Accordingly, the only method available to Ex Libris resource sharing customers who want to integrate with an OCLC resource sharing solution (i.e., WorldShare ILL or Tipasa) is the existing request transfer message method, which requires a subscription to the relevant OCLC resource sharing solution.

To configure peer-to-peer parameters:

1. Create a partner record with the **Profile Type** `ISO 18626`.
2. Select **System Type**.
3. From the **Parameters** tab, configure the following parameters:
    - The partner’s **Symbol**.
    - The **Server** URL in the **Server** field.
    - The **API key**.
4. Save your configuration settings.



Parameters tab

Email Parameters

- **Email address** - The email address to which resource sharing borrowing requests are to be sent. Note that if you are working in a sandbox environment or in a pre-"Go Live" production environment, the entered address must be added to the Email Include List Mapping Table in **General Configuration > Configuration menu > External Systems > Allowed Emails**. For details, see Configuring Allowed Emails).
- **Resending Overdue Days Interval** – A whole number that indicates the number of days for recurring overdue notifications.

Working with ILLiad Partners

Watch https://youtu.be/rzyermTvpCg.

Hybrid Pods

A hybrid pod is a pod that contains libraries performing resource sharing using Alma with Rapido libraries. All libraries need to be listed in the resource sharing directory. This happens automatically for Rapido libraries while adding members can be done by Alma libraries. For more information, see Contributing to the Resource Sharing Directory.

Note

The locate process uses participating items.

Creating Hybrid Pods

If a library determines it wants to create a pod that consists of other libraries, or its needs are not met by existing pods, the library can inform Ex Libris of the pod terms they require. The pod terms are defined in the pod table. Ex Libris then creates the pod and notifies the libraries that the pod exists.

Note

Rapido libraries do not need to download any libraries. Alma libraries need to download both Rapido and Alma libraries.

Hybrid Pod Tasks for Partners Using Rapido

Note

Partners are created automatically once a borrowing or lending request with each partner is created. The Rapido libraries do not need to download or create partners.

To complete the configuration, the hybrid pod must be placed in the correct order of the pod priority list for each resource sharing member.

Hybrid Pod Tasks for Partners Not Using Rapido

Non-Rapido libraries must manually download or create partners.

Note

When a request is sent from a Rapido partner to a non-Rapido partner, and both partners are part of the same hybrid pod, when the lender receives the request, the lender is converted to a Rapido Patner.
When a request is sent from a non-Rapido partner to a Rapido partner and both when the lender receives the request, and both partners are part of the same hybrid pod, when the lender receives the request, the borrower is converted to a Rapido Patner.

To manually add a partner:

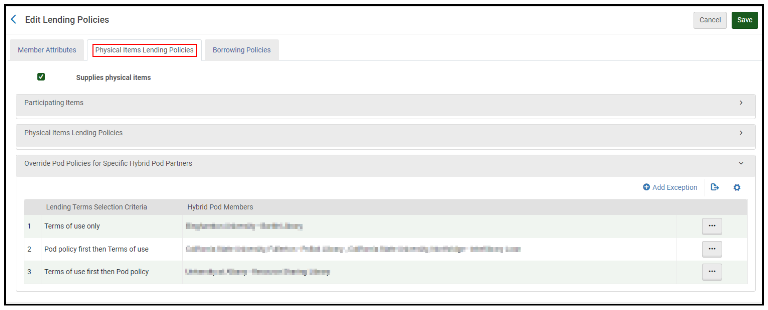
1. Join the resource sharing directory (**Configuration > Fulfillment > Contribute to Resource Sharing Directory > Resource Sharing Directory Member**). For more information, see Contributing to the Resource Sharing Directory.
2. Copy each partner in the hybrid pod from the **Community** tab (**Fulfillment > Resource Sharing > Partners**) in the partner list.
3. Add partners to a rota template (see Configuring Rota Templates) and refer to the configuration of rota assignment rules to configure Rota Assignment Rules.
4. Create **Terms of Use** (TOUs) that reflect the terms of the hybrid pod. For more information, see Fulfillment Unit and Terms of Use.
5. Add lending and borrowing workflow profiles and attach them to the non-Rapido pod partners. For more information, see Basic Resource Sharing Configurations and Configuring Workflow Profiles.
    1. Workflow profile selection recommendations:
       Borrowing:
       AUTOMATIC_RENEW,AUTO_WILL_SUPPLY,CANCELLED,CANCELLED_BY_PATRON,CANCEL_NOT_ACCEPTED,C
       Lending:
       CHANGE_DUE_DATE,CONDITIONAL,LENDER_CHECK_IN,PATRON_RENEWAL,REACTIVATED,RENEW_REPLY,S

Hybrid Pod Task for Both Partner Types

Attach participating items to the pod. See Participating Items.

Overriding Pod Policies

Requests involving hybrid pods use the pod policy rather than the Terms of Use (TOU). You can configure exceptions for requests received from specific members to apply the TOU rather than the pod policy. Members who are part of a hybrid pod can add an exception to the **Override Pod Policies for Specific Hybrid Pod Partners** section on the **Physical Items Lending Policies** tab (**Configuration > Resource Sharing > Configuration > Members**).



Lending terms exceptions

Hybrid pods can set the lending terms for requests to use:

- Terms of use only
- Pod policy first then Terms of use
- Terms of use first the Pod policy

If no exception is added, the behavior remains where the pod policy is applied to the request.

DOCLINE Integration Configuration

Rapido integration with DOCLINE can be configured for use by Rapido libraries to enable borrowing from the DOCLINE network.

To configure DOCLINE as a resource sharing partner:

From the **Parameters** tab, of the DOCLINE partner, define the following.:

Note

At least one routing setting must be set to **Yes** or the requests will error.

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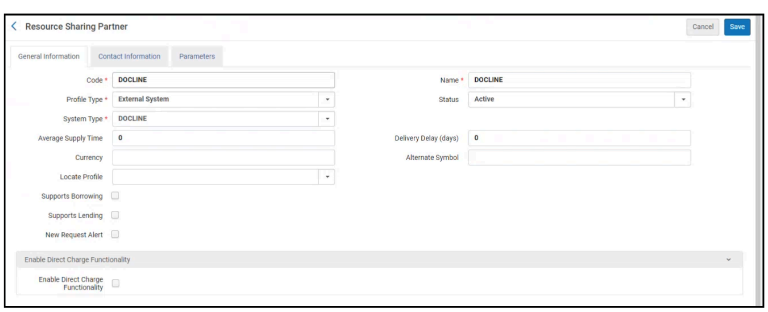
1. From the Resource Sharing Partner page (**Fulfillment > Resource Sharing > Partners > Add Partner**), **General Information** tab, enter **Code** `DOCLINE`.
2. From the **General Information** tab, set the **Profile Type** to `External System` and **System Type** to `DOCLINE`.



Resource Sharing configuration

- Enter your **Library ID** (supplied to you by DOCLINE).
- Set your DOCLINE routing settings.

Note

If the following error message appears: **Could not send request. The following mandatory fields are missing.** There are mandatory contact information fields that should be populated on your resource sharing library.

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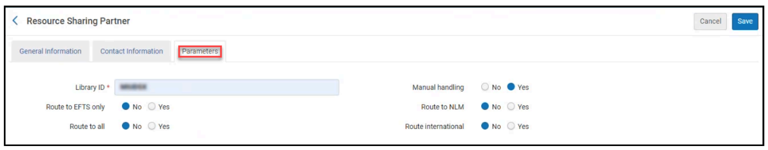
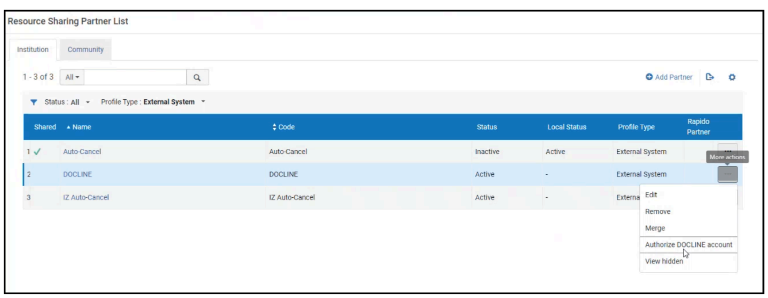
3. Set **Manual handling** to **Yes** to allow requests to be sent to DOCLINE without any specific identifiers such as an ISSN, OCLC number, etc. DOCLINE then creates a manual request, and no further automatic communication is received by Rapido. If the request includes an identifier, the identifier is sent to DOCLINE. If DOCLINE has the resource, then a request is created for the resource. If DOCLINE does not have the resource, a manual request is created. When set to **No**, Rapido does not send manual requests, and if DOCLINE does not have the requested resource, the request is rejected by DOCLINE.



DOCLINE Parameters

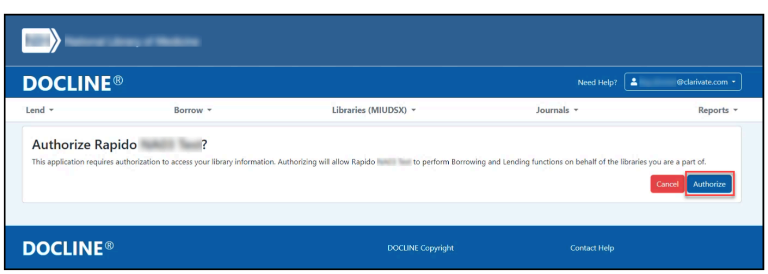
4. Select **Save** to save your settings.

After adding DOCLINE as a partner, from the Resource Sharing Partner List, select the action **Authorize DOCLINE account** to authorize Rapido to submit requests to DOCLINE on behalf of the institution.



Authorize DOCLINE account

When selecting the **Authorize DOCLINE account** action, you are redirected to your DOCLINE login page to authorize Rapido to send requests to DOCLINE. You must be logged in to your DOCLINE account to authorize Rapido. After selecting **Authorize**, DOCLINE generates a **Successfully authorized DOCLINE account** message.



Authorize Rapido

For more information, see [Docline Integration Workflow.]