

Managing Rapido Borrowing Requests

General

Managing Rapido Borrowing Requests

This section describes how to manage resource sharing borrowing requests, these are requests received from your patrons.

You must have a fulfillment service operator or manager in the scope of the resource sharing library to manage borrowing requests.

Use the **Rapido Sets** to access the borrowing requests (**Rapido Sets > Borrowing Requests >** select a borrowing set). Selecting **All active borrowing requests** or a specific set enables you to manage your workflow actions. The number count enables you to quickly focus on which workflows need attention.

Resource Sharing Requests	
Borrowing	Lending
All active borrowing requests	640
<div style="background-color: #e67e22; color: white; padding: 5px; margin-top: 10px;"> ^ New </div>	
Rapido Digital	94
Today	0
Digital Active	9
Requests Not Sent	137
Show more ▼	
<div style="background-color: #e67e22; color: white; padding: 5px; margin-top: 10px;"> ^ In Process </div>	
Waiting for partner to process	289
Today labels	2
Requests that were considered for purchasing	5
Received by RapidILL	27
Show more ▼	
<div style="background-color: #e67e22; color: white; padding: 5px; margin-top: 10px;"> ^ Closed </div>	
Cancelled	32
Rejected / Expired Requests	67
Completed	169

Borrowing Resource Sharing Requests

Note

When an intended lender cancels a request, the request is no longer considered completed. The request is then sent to the next lender on the list, and the History indicates that the previous lender rejected the request with a note that: **The lender shipped the request but then scanned it back to the library. Therefore, the lender was removed from the rota of this request.**

Due Dates

The lending due date calculation includes the delivery shipping time to the borrower, the loan period, and the return shipping time to the lender.

For example, if the shipping time is **five** days and the loan period is **14** days, and the current date is **May 1, 2021**, then the **Lending Due Date = May 25, 2021** (May 1st + 5 (shipping to the borrower) + 14 (loan period) + 5 (shipping to the

lender)).

Once the resource is shipped and the shipping message is sent to the borrower, the borrowing due date will also be May 25, 2021.

The loan period is the **Borrowing Due Date** minus the return shipping period. In our example, May 25th - five shipping days = **May 20, 2021**.

Rapido Sets

Workflow Statuses

The request status updates according to the action selected.

Additionally, the request status updates when the lending library performs an action for the request.

Note

The available actions depend on the request status.

Resource Sharing Borrowing Request Statuses

Action	Description
Automatic renew	The borrowing request can automatically be renewed.
Bad citation	<p>A lender received the request and thought that there was something wrong with the citation; for example, the pages do not match the article.</p> <ul style="list-style-type: none">• Fix the citation and select Resubmit.• If there is nothing wrong with the citation, send the request to another partner. RapidILL first resends the request to other lenders. The request is only resent to the original lender if there are no alternative lenders. If the borrower sees that the request is resent to the same RapidILL partner, the borrower should choose a different partner.
Cancel request not accepted	A cancellation request can be rejected by the partner.
Cancelled by partner	A request can be canceled by the lending partner and notification is received by the borrowing partner. When a lender cancels the request, if there are other lenders, the request will be sent to them. Otherwise, it will remain at this status.
Cancelled by patron	A request can be canceled by a patron.
Cancelled by staff	A request can be canceled by a staff member. The borrowing library is not fulfilling the request.

Action	Description
Claimed	<p>For peer-to-peer partners, selecting the Automatic Claim field on the partner record enables the Time to Claim (days) field. This triggers an automatic claim letter (RSBorrowerClaimEmailLetter or General message) when a configured period of time is reached.</p> <p>When a claim letter is automatically triggered, the request status is set to Claimed.</p>
Conditional	The lender has responded with a conditional response to fulfilling the request.
Created borrowing request	The request was created but was not assigned a partner.
Damaged communicated	A damaged item can be reported by the partner. When enabled, the Damaged row action is enabled for a borrowing request. See Managing Resource Sharing Borrowing Requests .
Declared lost by partner	An item can be declared lost by the partner.
Deleted	Staff can delete requests but staff cannot see these requests. Your requests at this status are not visible.
Digitally received by library	Request can either be closed automatically once digitally supplied or requests can remain open once delivered. Requests remain with this status.
Expired	<p>Request expired for the lender. If there are no other predefined lenders, the request moves to the next lender. Otherwise, it remains at this status.</p> <hr/> <p>Note</p> <p>Expired is a final state. When a request expires, the request is cancelled and a letter is sent to the patron. The request remains active enabling a librarian to reactivate the request if the librarian chooses to look for another lender.</p> <hr/> <p>Note</p> <p>When the parameter rs_keep_expired_request_active (Configuration > Fulfillment > General > Other Settings) is set to <code>true</code> (default <code>false</code>), Expired requests are editable and partners can be added manually.</p> <hr/>
Exported to third party	The request was sent to partner as a last resort and is being processed outside of this system.

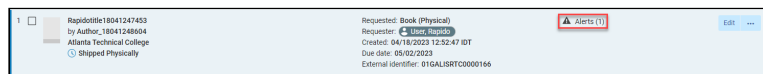
Action	Description
Externally Obtained	Manually update the status after receiving an item from the third-party partner. This is used as part of the Sending a Request for a CCC GetItNow service .
Lender check in	<p>This status must be set manually. The request is not closed by the borrower until a message is received that the item was checked in.</p> <p>This option should not be selected in workflow profiles that are used by broker partners because it causes the request to wait for lender confirmation.</p>
Loaned item to patron	Item was checked out for the patron.
Local holding	Item was identified as local owned.
Locate failed	A lender match could not be found. Staff may want to review requested data or, manually assign a lender, or cancel the request.
Locate in process	This status is a temporary status used while searching for a holdings match.
Lost and fee paid	This is a manually set status for updating the borrower that the lost item fee was paid.
Lost communicated	When the Lost action is selected for a borrowing request, the request's status changes to Lost Communicated , and a letter is sent to the lender.
Manual renew	<p>Enable manually approving renewal requests for borrowing partners linked to the specified workflow profile when automatic renewals are not allowed.</p> <p>For details on system behavior when this option is selected, see the Renew and Renew Reply entries in Workflow Actions.</p>
Mediated Patron Renewal	Enable Mediated Patron Renewal to require operator review before renewals are transmitted to the lender. A mediated renewal receives the status of Mediated Patron Renewal while it is waiting for operator review. Once requests are sent to the lending institution, the request status is set to Renew Requested .
Overdue request	When the Send Overdue Message to Resource Sharing Borrowing Partner job runs on the lender side, an overdue message is sent to the borrower and the request status is updated. See Send Overdue Message to Resource Sharing Borrowing Partner .
Pending Approval	This status is triggered by the copyright process.

Action	Description
Physically received by library	This status is automatically set after applying the Receive action.
Reactivated	A request receives this status after using the Reactive action after staff have further acted on the request. To enable this feature, you must contact Ex Libris Support.
Ready to be sent	The request is waiting to be sent to the partner.
Recalled by partner	This is a manually set status when the lender uses the General Message to recall the item. The Recalled by Partner status places a recall on the item even if the Terms of Use prohibits recalls.
Received - not for loan	The item was received by the borrowing library; however, the item is not available for loan to the patron. Some examples of when to use this status are: When the due not cannot be assigned or when the library hours are not configured.
Rejected by partner	The lender has rejected the request as they are unable to fulfill it.
Renew request not accepted	The lender has rejected the request for renewal.
Renew requested	A request for renewal was initiated.
Renewed by partner	The lender has granted permission for renewal.
Report damaged item to partner	This is a manually assigned status set after sending a general message to the lender or contacting the lender to notify them that an item was damaged.
Reported lost item to partner	This is a manually assigned status set after sending a general message to the lender or contacting the lender to notify them that an item was lost.
Request accepted	This is a manually set status. A requested item can be accepted by the partner.

Action	Description
	<hr/> <p>Note</p> <p>This status can be used in the workflow profile and used for proprietary purposes.</p> <hr/>
Request Completed	This status is a terminal status and all aspects of the request are completed.
Request sent to partner	The request was sent to the partner, and the partner is processing the request.
Returned by patron	The patron has returned the item, and it is in transit to the resource sharing library for that library to scan in and return. The status updates to Returned to partner or Shipped to partner .
Returned item to partner	The patron returned the item. The item is in transit to the resource sharing library to be scanned in by the lender.
Shipped Digitally	This status is used when <code>borrower_document_delivery_send_automatically</code> is set to false in order to mediate the forwarding of digital content to the patron, or if documents are shared as attachments rather than links.
Shipped Physically	The partner updated the status to Shipped .
Waiting for cancel response	When this option is selected, if a borrower cancels a request, the request is not actually cancelled until the lender sends a cancellation response.
Will Supply	A partner can change the status of the request if it has not yet shipped but will be shipping soon.

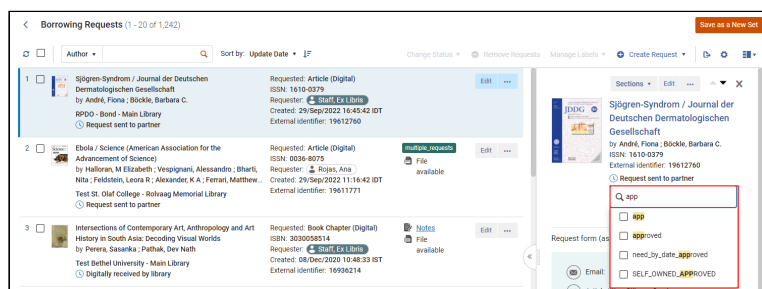
Managing Alerts

When configured, (see [Managing Borrowing Alerts](#)), alerts indicate that the borrower must act manually to continue the workflow.



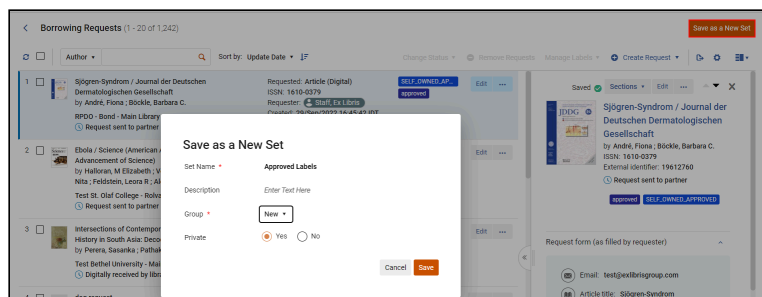
Alert icon

You can also add multiple labels by selecting multiple checkboxes.



Multi-select labels

Once labels are created, they can be used for creating Radio Sets. For more information, see Rapido [Sets](#).



Creating a set based on labels

Creating Labels Automatically

Labels can automatically be added to borrowing requests based on a Borrowing Mediation rule or Copyright rule that adds labels to requests due to the condition. For more information, see [Borrowing Mediation Rules](#).

Borrowing Mediation Rules

Borrowing mediation rules can be configured and used for managing borrowing requests to enable staff mediation, automatically apply labels, support fulfillment of locally owned items, or automatically cancel requests. For more information on configuring mediation rules, see [Mediation Rules](#).

Mediating Based on Frequency Request

When the mediation rule input parameter **Number of requests for the same resource within a given period of time** ([Configuration > Resource Sharing > Rapido Rules > Borrowing Mediation Rules](#)) is configured, requests can now be stopped for mediation for library staff to consider acquiring a resource based on the number of requests for a specific item during a specific period of time.

Borrowing Mediation Rule Editor

Name: Purchase Consideration

Description:

Created By: Staff, Ex Libris | Created On: 15/09/2025

Updated By: Staff, Ex Libris | Updated On: 13/11/2025

Input Parameters

Name	Operator	Value
1 Number of requests for the same resource within a given time period. (Enter two comma-separated values. 1. Number of requests. 2. Considered number of months.)	=	36,12
2 Labels	Not in List	PurchaseDeclined

Output Parameters

Labels: consider_purchase | Action:

Mediation rule to consider for purchase

Mediating Based on ISBN/ISSN

You can upload a spreadsheet that contains a list of ISBNs/ISSNs that the institution would like to mediate in order to determine whether to allow borrowing resource sharing for the resources included in the file. For example, this can be used to mediate requests for textbooks. This is done from the **Input Parameters (Configuration > Resource Sharing > Rapido Rules > Borrowing Mediation Rules)**, select **Add Parameter > Excel with ISBN/ISSN**. Select the folder icon



to upload an Excel file.

Note

The Excel file can only contain one column.

Borrowing Mediation Setup

Borrowing Mediation Rule Editor

Name: Mediate by Resource ID

Description:

Created By: Ex Libris | Created On: 08/Mar/2023

Updated By: Ex Libris | Updated On: 08/Mar/2023

Input Parameters

No records were found.

Output Parameters

Labels:

Excel with ISBN/ISSN

ISBN_ISSN list.xlsx

Excel with ISBN/ISSN Input Parameter

When a request is received that contains an ISBN/ISSN that is listed on the Excel file, the request is stopped for mediation and the label that you define in the mediation rule is added to the request.

Borrowing Requests (1 - 20 of 3,098)

Author: | Sort by: Update Date | | Change Status | Remove Requests | Manage Labels | Create Request | Save as a New Set

1	hello / Food University of Deusto Request sent to partner	Requested: Article (Digital) ISSN: 0367-2940 Requester: Ex Libris Created: 03/02/2023 17:48:21 External identifier: 48KTH0016725	
2	Food [electronic resource.] by Coultate, Tom. University of Deusto Ready to be sent	Requested: Book (Physical) ISBN: 1-84973-740-1 Requester: Ex Libris Created: 03/02/2023 17:47:51 External identifier: 48KTH0016724	In List

Request stopped for mediation

Mediate if Missing Metadata Example

If the request should be mediated by staff and if it is missing metadata, a mediation rule can be used. Adding an escape label, the label that the staff should add to release the rule from mediation, can be useful for requests that may lack that metadata field. An escape label is added to the rule by using a label as an input parameter with the **Not In List** operator. Staff then add this value to the request to release the request from this mediation rule. Enrich from Global Index is an action that can be used to edit or add fields to a request. For more information, see [Enrich From Global Index](#).

Borrowing Mediation Rule Editor

Name:

Description:

Created By: Staff, Ex Libris Created On: 07/Apr/2021

Updated By: Staff, Ex Libris Updated On: 23/Mar/2022

Input Parameters

Name	Operator	Value
1 Missing Book Metadata Fields	In List	ISBN
2 Labels	Not In List	ISSN_added_OR_not_needed

Output Parameters

Labels:

Action:

Mediation Rule

Mediate on Partner or Pod Example

Requests can be mediated before they are sent to specific partners or pods. If requests require staff review before sending to a partner of last resort, a partner that charges, or an external partner, this partner can be added as an input parameter to the request. Mediation occurs at the **Ready to Be Sent** status with the designated partner. Creating the rule with a unique output parameter label can indicate to staff the reason for mediation. Staff can review the request to determine if it can be sent to this partner or if additional actions are required first.

Review and workflows may be performed through [Enrich from Global Index](#) action to modify request data and fulfillment by higher priority partners, an acquisition workflow, or [Send Query to Patron](#) workflow. If staff determine that the request should be released from mediation and sent to the partner, the rule, which includes an escape label (an input parameter with a **not** list label), supports this workflow. The manual addition of the escape label by the staff allows the request to be sent to the partner.

Note

Mediation rules can be created with the **Partner** input parameter and the **Stop** output action, giving libraries control over the workflow. They can review the request and edit it prior to saving and working with this partner. They can modify data and recalculate to work with a new partner or choose whether to add a new partner manually, cancel the request, or run the acquisitions workflow.

Borrowing Mediation Setup

Borrowing Mediation Rule Editor

Name: Review requests before use system of last resort

Description:

Created By: Staff, Ex Libris | Created On: 15/08/2023

Updated By: Staff, Ex Libris | Updated On: 06/09/2024

Input Parameters

Name	Operator	Value
1 Requested Format	=	Physical
2 Partner	=	Partner of Last Resort
3 Labels	Not in List	ExternalPartnerOkay

Output Parameters

Labels: externalpartner | Action:

Mediation Rule with Partner Input Parameter

Mediating Based on Copyright Status

The library's copyright rules can be applied to manually generated requests by mediating the request according to the copyright status.

To enable library staff to work more efficiently, when the parameter `rs_borrower_copyright_management` (**Configuration > Fulfillment > General > Other Settings**) is set to `true` (default `false`), copyright information for requests is displayed and manageable from the right pane of a request.

Borrowing Requests (1-20 of 102)

Requester: Sara Carr | Created: 18/07/2018 10:37

Request information

Requested format: Digital
Requested media: Any
Internal identifier: 4988411160000121
Created: 18/07/2018 10:35
Updated: 18/07/2018 10:36

Request attributes

Copyright status

Agree to copyright terms

Copyright status on the right pane

To edit the copyright status:

1. Select the pencil icon



Note

The copyright information can only be edited for requests that have not yet been sent.

Request attributes

Copyright status

Agree to copyright terms

Edit Copyright status

- Select the relevant **Copyright status**, select **Calculate copyright status**, and select **Save**. The request status updates based on the copyright calculation.

Note

When **Copyright approved** or **Copyright not required** is selected, the request is allowed and released. When **Copyright not approved** is selected, the request is stopped for staff intervention.

Set Copyright status

The copyright status is also accessible from the **Edit** pane.

Copyright status on the Edit pane

Workflow Actions

Each item includes the request details and the request status. Filter the requests using the facets or search bar.

Select an item to add labels to the request or save the request as a new set. You also have the option to append a note to the request.

Select edit to update any of the request details. Select

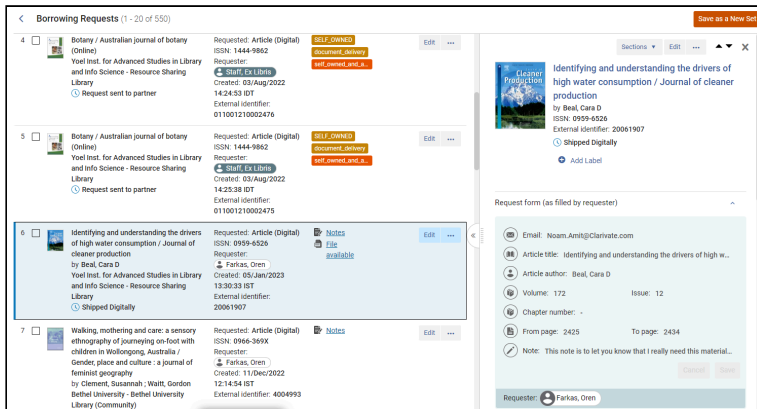


to apply the relevant action to the request as per the [Actions](#) table. The request status updates according to the action selected.

Additionally, the request status updates when the lending library performs an action for the request.

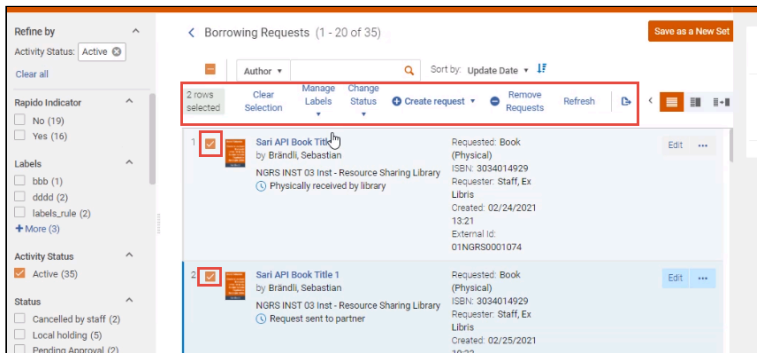
Note

The available actions depend on the request status.



Resource Sharing Borrowing Requests Task List Page

You can also multi-select requests to apply bulk actions to the requests.



Borrowing Requests

Note

To filter out borrowing requests from active Rapido sets, see [Configuring Borrowing Request Inactive Filters](#).

Resource Sharing Borrowing Request Actions

Action	Description
Assign to	Use this action to assign the request to a user.
Cancel	<p>The borrowing request cannot be canceled after shipment, but the fulfillment request can (either using My Account for patron or using Manage Patron Services page for staff). If a fulfillment request is cancelled after shipment, upon receiving the item in the borrowing library, the item is immediately marked to send back to the lender.</p> <p>The Cancel action only appears when:</p>

Action	Description
	<ul style="list-style-type: none"> • The request is still active. • The request does not have a status of Loan. • The request has not been shipped. • No partner exists or the active partner is associated with a borrowing workflow profile where the Canceled by staff is included. <p>When canceling a request, the request's status becomes Canceled by staff.</p> <p>You can also delete requests in Primo, on the My Account tab. When doing so, the borrowing request's status becomes Canceled. If an item is on the hold shelf when canceled in Primo:</p> <ul style="list-style-type: none"> • The hold request is canceled • The item moves to the expired hold shelf • The request is marked as Completed <p>For details on the Primo My Account tab, see My Account.</p> <p>When a request is canceled, a message is sent to the patron. The letter is Ful Cancel Request Letter. To configure the message, see Configuring Rapido Letters.</p>
Cancel partner	<p>This action sends a cancellation notice to the lender and the borrowing request is kept active so that Rapido then looks for the next possible lender.</p> <p>Use this action when you do not want to use the current partner, for example, a non-responding partner.</p> <hr/> <p>Note</p> <p>This action is accessible from the full view of the request and will soon be added as an action in the actions menu.</p> <hr/>
Check Out to Patron	<p>Marks that the patron received a physical non-returnable item and completes the request.</p>
Conditional Reply	<p>This action enables the lender to send the borrower a condition for the request. When selecting this action, you have the option to select a Conditional Reason, Date for reply, and a Note. Select Yes or No in response to the condition specified by the lender. If the response is Yes, the request status changes to Sent and the Date for Reply field is cleared. If the response is No, the status changes to Rejected by Partner and continues to the next partner in the rota.</p>
Convert Request Type	<p>You can change the type of request by converting the request type and adding the required information (such as pages or chapter numbers when converting to a book chapter).</p>
Convert To Rapido Request	<p>This action is only available during implementation for the testing period.</p>

Action	Description
Damaged	<p>Send an email to the lender to report that damage occurred and set the status to Damaged communicated. Appears only:</p> <ul style="list-style-type: none"> When Damaged communicated is enabled in the borrowing workflow profile. See Adding Workflow Profiles.
Duplicate	<p>Create a new request based on the existing one. You can then modify the request as required on the Resource Sharing Borrowing Request page.</p> <p>When duplicating a Resource Sharing Borrowing request, the values in the following fields are copied to the new request:</p> <ul style="list-style-type: none"> Title ISSN, ISBN (Metadata fields) Author Requester Owner Request Status Requested Format Delivery Location Request Note
Enrich from Global Index	<p>This action automates your ability to improve the data associated with the request, for example where poor metadata was provided in the Resource Sharing Blank form.</p>
Find Partners	<p>For circumstances where none of your partners can fill your request, the Find partners opens the Potential Lenders list of lenders who have the requested resource and can possibly fill the request.</p>
Fill locally	<p>Used for document delivery for material owned by the institution using Rapido.</p> <hr/> <p>Note</p> <p>This action is only applicable for digital requests.</p> <hr/> <ul style="list-style-type: none"> Upload existing file — When a digital request is active, Rapido offers a Fill locally action so that the borrowing institution can locally fill a request without needing to send the request to a lender in cases such as where the resource was found in open access or the library owns it. When using the Fill locally action, the borrower can either Upload file to send the resource and complete the request from the borrower's library. Once the file is sent, the system closes the borrowing request, and the partner is set to the borrowing library name. Create lending request — You can use the Create lending request to supply the file at a later stage. In this case, the lending request will be awaiting your staff to be fulfilled. <hr/> <p>Note</p> <p>This action is also available for libraries that are closed for lending.</p> <hr/>
General	<p>Send a general message with a borrowing request to a lender (for ISO/Mail partners)</p>

Action	Description
Message	<hr/> <p>Note</p> <p>This does not include requests processed by Rapid.</p> <hr/>
Locate Resource	A non-Rapido request manually activates the Borrowing Locate process. This action only appears if the request has an assigned partner or rota. See Borrowing Locate Process .
Lost	<p>Send an email to the lender and set the status to Lost communicated. Appears only:</p> <ul style="list-style-type: none"> • For Rapido email or ISO partners • When the request is received by the library (and not as Physical non-returnable) and has not yet been returned to the partner. • When Lost communicated is enabled in the borrowing workflow profile.
Override Local Holding	This action is relevant for Document Delivery. Rapid prevents you from placing requests that you already have a holding for such as digital requests for resources that your institution owns. Use this action to override this and enable the request to be sent to Rapid.
Purchase Request	<p>For Fulfillment Services Operators / Managers with the privilege Submit Purchase Request RS enabled, you can create a purchase request with the information in the borrowing request. If you do not have this privilege enabled, open a support ticket. If the borrowing request is inactive, you are directed directly to a purchase request form. If the borrowing request is active, a window is displayed to select whether to cancel the borrowing request or keep the borrowing request active alongside the purchase request.</p> <p>The purchase request's requester field is populated so that:</p> <ul style="list-style-type: none"> • If the resource sharing request was canceled, the field is populated with the requester from the original borrowing resource sharing request. • If the resource sharing request was inactive or kept active, the requester field is populated with the logged in user's ID.
Reactivate	<p>This action is available:</p> <ol style="list-style-type: none"> 1. If the Operator has the Reactivate privilege in the scope of the owner of the request (contact Ex Libris support to enable this option). 2. Appears only when Reactivated is enabled in the Borrowing Workflow Profile. See Adding Workflow Profiles. 3. The status is one of the following: CANCELLED, REQUEST_COMPLETED, CANCELLED_BY_PATRON, CANCEL_REQUESTED, REJECTED, EXPORT_TO_THIRD_PARTY. <p>Select this option to reactivate a resource sharing request whose status is Request completed or Shipped digitally. It is intended to revive a completed request, enabling it to reset its status and put it back into the proper workflow step. It updates the last active lending request. When using this action, you can send a message to the lending side. A temporary item is recreated using the previous barcode with the process status set to In resource sharing. The library and location of the item are set to the same values as when the item was initially created. If the item is not yet on loan, a hold request is reinitiated. When reactivating, two options appear on the confirmation window: Reactivate loan and Send general message. If no loan is initiated, the request status is Request Reactivated. The request's original external ID is maintained.</p>

Action	Description
Recalculate Partner	<p>Recalculate is used for Rapido pods to re-run the process to find a partner. For rotas (including locally managed pods), non-active partners from the rota are removed, and it re-runs the process of auto-assigning a rota. It is a valid action if the requested item has not yet shipped. This action sends a cancellation notice to the partner assigned before using the action.</p> <p>We recommend using this action for cases such as locate failed, or when the request is stuck on Created Borrowing request. Additionally, use this action after making changes to mediation labels or request metadata if the new information should be used to recalculate the partner.</p> <hr/> <p>Note</p> <p>During the Rapido implementation, this action is also used to route a request to Rapido (not needed for every request!)</p> <hr/>
Receive	<p>Select a receiving format and enter a temporary barcode to enable receiving the resource. If the generate_resource_sharing_temp_barcode configuration setting is set to true, the temporary barcode is displayed automatically (see Configuring Other Settings).</p>
Reject	<p>Use Reject to update a request that was rejected by the lender but not automatically updated on the borrower side, for example, using email. When used on the borrower side, it does not send any message to the lender but does try to find another partner. It is a valid action if the requested item has not been shipped yet.</p>
Release assign	<p>Enables you to unassign an assigned request from a user.</p>
Renew	<hr/> <p>Note</p> <p>This option is only available for Rapido requests if the pod's terms allow renewal.</p> <hr/> <p>Renew a resource sharing borrowing request. A dialog box is displayed to enter a due date for the request and an optional note in the Internal note and/or Note to partner fields. For details on these fields, see step 3 in Rejecting a Borrowing Request. The request status updates to Renewed by Partner. For more information, see Managing Borrowing Renewals.</p> <p>This option is displayed when Staff renewal is selected for lending requests in the Resource Sharing Lending Workflow Profile (see Configuring Workflow Profiles).</p> <p>If the request is renewed, a message is sent to the patron and a renewal fee may be charged. The letter is Full Borrowing Info Letter. To configure the message, see Configuring Rapido Letters. A resource sharing renewal fee is set as part of a fulfillment policy; see Adding Fulfillment Policies.</p> <p>For more information about requesting renewal of a borrowing request, see the ISO ILL: Request Renewal video (10:06 mins).</p>
Request Renew	<p>Request renewal of a resource sharing borrowing request under the following conditions:</p> <ul style="list-style-type: none"> • The lending pod must allow renewing. • A Resource Sharing Lending Workflow Profile exists with Staff Renewal enabled. • The partner is not part of a fulfillment network.

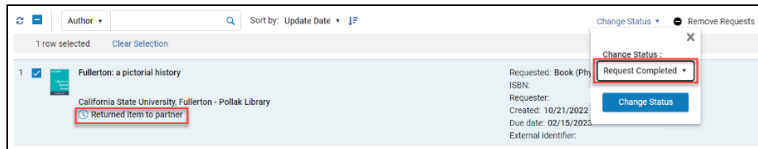
Action	Description
	<ul style="list-style-type: none"> • The item has arrived. • The item has not been returned. <p>A dialog box is displayed to enter a due date for the request and an optional note which appears in the Notes tab page of the request.</p> <hr/> <p>Note</p> <p>The renewal due date calculation includes the loan period, and the return shipping time to the lender. For example, if the pod terms shipping time is seven days, and the loan period is 21 days, the renewal period is 14 days, and the current date is May 1, 2021, then the Lending Due Date = May 21, 2021 (14 (renewal period) + 7 (shipping to the lender)).</p> <p>The loan period is the Borrowing Due Date minus the return shipping period. In our example, May 21st - seven shipping days = May 14, 2021.</p> <hr/> <p>If the Resource Sharing Lending Workflow Profile has the Renewal Response and Staff Renewal options selected, the request status changes to Renew Requested. For details on workflow profiles, see Configuring Workflow Profiles.</p> <p>If the request is renewed, a message is sent to the patron and a renewal fee may be charged. The letter is Full Borrowing Info Letter. To configure the message, see Configuring Rapido Letters. A resource sharing renewal fee is set as part of a fulfillment policy; see Adding Fulfillment Policies.</p> <hr/> <p>Note</p> <p>This action can only be used once.</p> <hr/> <p>Note</p> <p>If Renewal Response was not selected for the workflow profile, the request is automatically renewed after selecting the Request renew link; the request's status is Renewed by partner, and the Renew link does not display.</p> <p>This option appears for requests with a Received status.</p> <hr/>
Resubmit	Send the request to Rapido again.
Resupply Request	<p>For Rapido document deliveries, after a request is completed, Rapido enables you to request a new copy of the original request in case the original request was not properly received. This action reopens the request on the borrower's side for RapidoILL requests if the request is complete.</p> <hr/> <p>Note</p> <p>Borrowers can select resupply more than once per request. The limit is up to eight resupply per request. Resupply can be performed for a request with the same lender twice. Afterward it moves to a new lender. Resupply can be performed for four unique lenders on a request.</p> <hr/>
Return	Displays when the request is received by the library (and not as 'Physical non-returnable') and has not yet been returned to

Action	Description
	<p>the partner. If the borrowing Workflow Profile for the partner includes the Lender check in option, the request status changes to Returned item to partner (see Configuring Workflow Profiles).</p> <p>The Resource Sharing Return Slip Letter is printed when returning a borrowing item to the lender. For more information, see Configuring Rapido Letters.</p>
Search in Market	<p>This action is visible if the:</p> <ul style="list-style-type: none"> • Request is material type of book • Request format is physical • Library is using Rialto • Staff have the appropriate user roles: <ul style="list-style-type: none"> ◦ Your current user roles plus Rialto roles. ◦ To search in the market you need CART_MANAGEMENT privileges. See Rialto User Roles – Descriptions and Accessible Components. ◦ Rialto Administrator, Rialto Manager, Rialto Purchaser, Super Selector, Selector, and Selector Limited.
Send email to partner	<p>Use this action to email a partner directly from the borrowing task list request. This option eases workflows, such as when a borrowing library wants to ask a question or for any type of messages such as a thank you note. These messages are saved in the request for future reference.</p> <p>Correspondence can be initiated using the Send email to partner action or from the Start Communication button on the Communications tab.</p>
Send Query to Patron	<p>Display the query types configured on the Patron Query Types Code Table page (see Configuring Patron Query Types). The Select email template dialog box appears to select the email template you want to use for the query. The dialog box also contains a Note to Patron field for a free text note to be included on the Query to Patron letter (QueryToPatronLetter). If there is only one template type of Query to Patron, the dialog box is displayed with just the Note to Patron field available for input.</p> <p>For details on system behavior when selecting this option, see Configuring Patron Queries.</p>
Show File	<p>Applies to digital requests. Selecting this option downloads the file.</p>
Status Query	<p>Request a status update from the lending institution. This is only applicable to Rapido and ISO partners.</p> <p>The returned borrower ISO status is recorded in a note. Each ISO status corresponds to the following Rapido request statuses:</p> <ul style="list-style-type: none"> • Not supplied — Rejected by partner, Locate failed, Canceled By Patron, Expired • Pending— Created borrowing request, Request sent to partner, Ready to be sent, Locate in process, Will Supply, Pending Approval • In Process— Loaned item to patron, Returned by patron, Renew request not accepted, Renewed by partner, Renew requested, Renew Accepted, Mediated Patron Renewal, Exported to third party, Manual renew, Automatic renew, Waiting for receive digitally

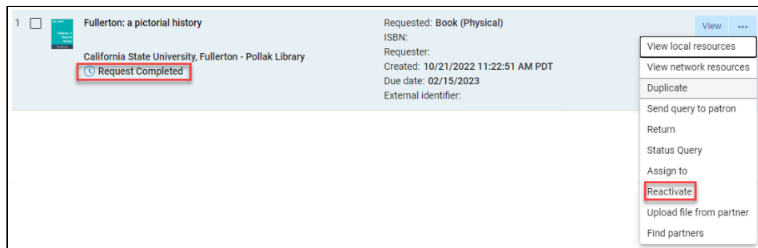
Action	Description
	<ul style="list-style-type: none"> • Cancel Pending— Cancel request not accepted, Waiting for cancel response • Canceled — Canceled by partner, Canceled by staff • Shipped — Shipped Digitally, Shipped Physically • Received — Physically received by library, Digitally received by library, Received - not for loan • Overdue — Overdue request • Returned — Returned item to partner • Checked In — Request Completed, Lender check in, Externally Obtained • Recall — Recalled by partner • Lost — Report lost item to partner, Declared lost by partner • Unknown — Report damaged item to partner
Upload file	<p>For digital requests or for any requests the library permits sharing electronically, use Upload file to attach the file to the request. This enables the Send to Patron option to be available.</p> <hr/> <p>Note</p> <p>For this feature, your browser settings must be configured to allow viewing of PDF files.</p> <hr/>
View	<p>View requested information. Only displays when the request's status is one of the following:</p> <ul style="list-style-type: none"> • Returned item to partner • Request completed - The request was either delivered or canceled before reaching the hold shelf. • Shipped digitally • Canceled by partner • Cancel requested
View Local Resources	<p>If local resources exist but a borrower creates a resource sharing request, you can view the local resources for the request.</p>
New for March! View locate History	<p>Shows the job information for the last locate job that ran for the request when the request partners are peer-to-peer ISO Alma resource sharing partners.</p>

Reactivating Accidentally Returned Requests

Reactivation can be performed from the **Request Completed** status. If needed, a status can be changed manually to then perform reactivation.

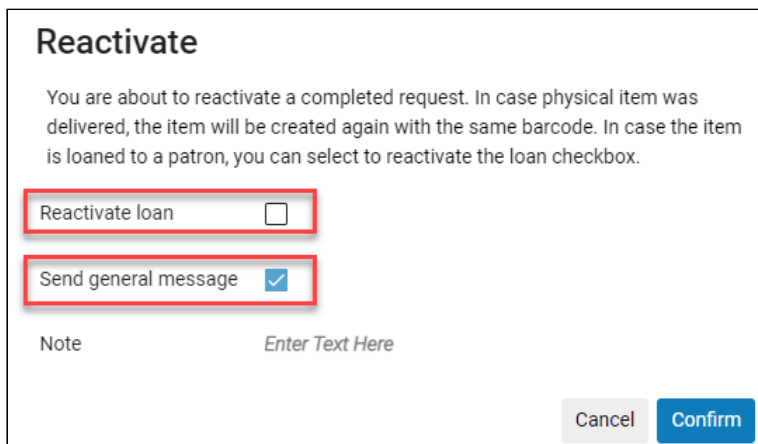


Request completed status



Reactivate option

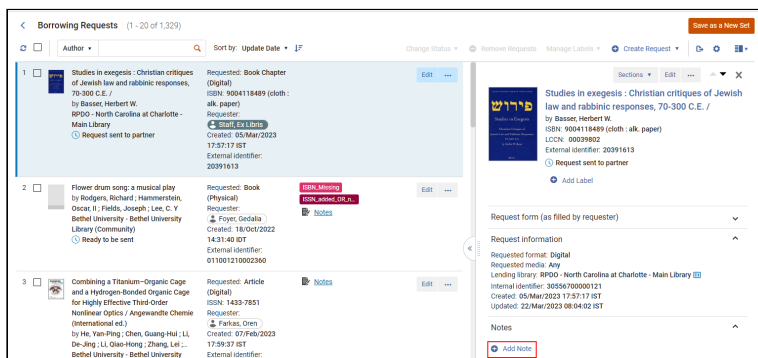
4. From the Reactivate menu there are actions to choose from.
5. **Reactivate Loan checks** the item out to the patron, but it does not update the status to **Loaned Item To Patron**.
6. **Send General Message** is a convenient means to communicate to the lending library that the request has been reactivated. The request is now Reactivated and can be checked out to the patron using regular workflows.



Reactivated request

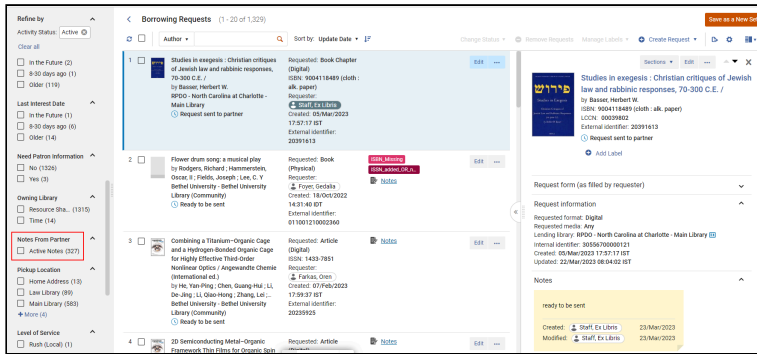
Adding a Note

You can add notes to requests by selecting **Add Note** from the right pane.



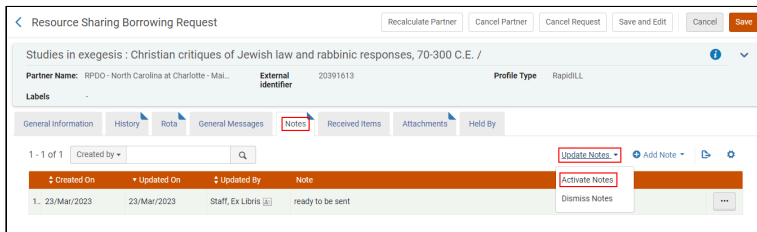
Add Note

By default, system notes are included in the **Active Notes** facet, but notes added from the right pane are added as dismissed, and therefore, the note is not included in the **Active Notes** facet.



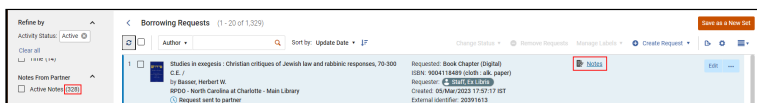
Active Notes facet

To activate notes added from the right pane, edit the request, and select **Update Notes > Activate Notes** from the **Notes** tab.



Activate Notes

A **Notes** label is then added to the request, and the note is now included in the **Active Notes** facet.



Notes label and Active Notes filter

View Locate History

New for March! The **View locate History** action is available for **Borrowing Requests**. This action shows only the locate jobs created for a specific request, enabling users to review the locate report and understand why the locate passed or failed.

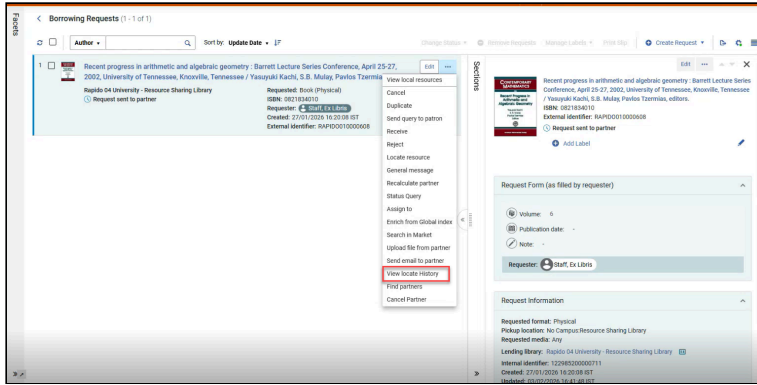
Note

The action appears only for new requests.

To review the locate report:

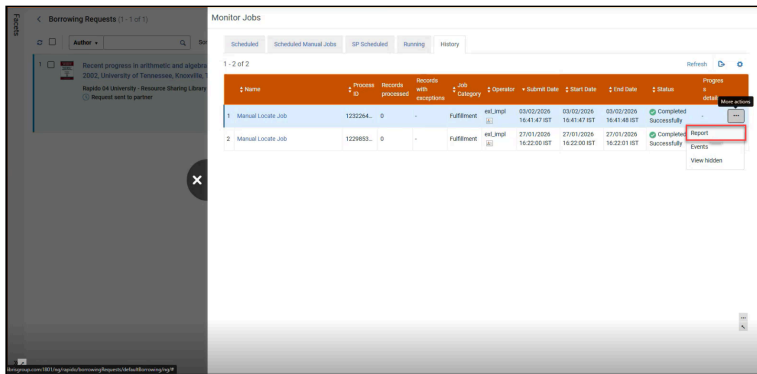
1. Open the **Borrowing Requests** task list and select the request.

- In the row actions list (...), select **View locate History**. A sliding pane opens and displays only the locate jobs that were run for that specific request.



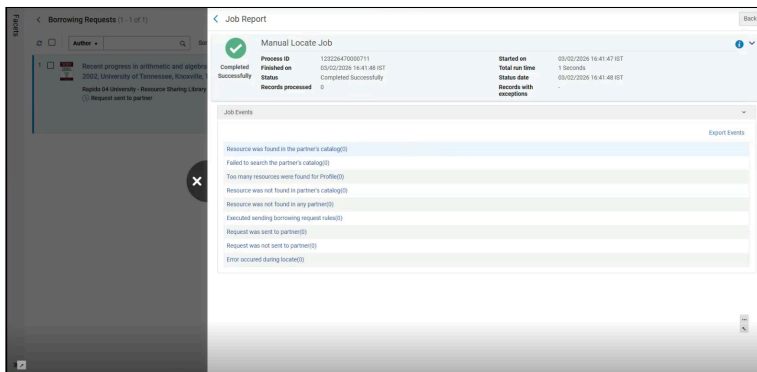
View locate History

- In the row actions list (...), select **Report**.



Report

- Review the **Job Events** list to understand whether the locate process succeeded or failed, along with the reasons for that outcome.



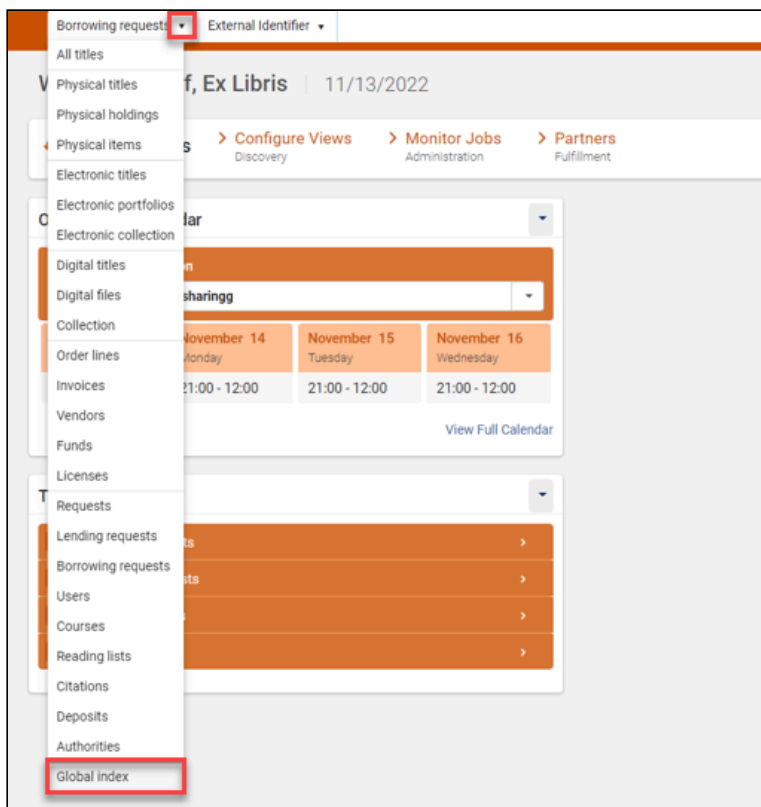
Job Events

Searching and Creating Requests from the Global Title Index

The following roles can search the Global index:

- Fulfillment Services Operator
- Fulfillment Services Manager

You can create Rapido requests by searching the CDI on the Global Title Index.



Global index

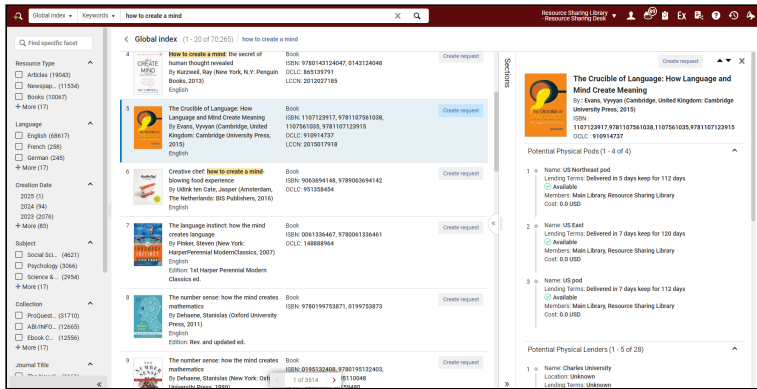
Note

We recommend checking the **Do Not Retrieve Local Records from CDI** checkbox ([Configuration > Discovery > Display Configuration > Configure Views](#)) to avoid receiving duplicate results from the CDI for resources that exist locally when using a blended scope or when you do not want to return results for local resources when searching the central index.

From those results, you can create a request by directly searching the **Global index**.

Note

To enable you to send a request based on lender information, when searching the Global index, Potential Physical Pod information and Potential Physical Lenders are viewable in the right pane. Each record displays which pod holds the resource from the pods you are part of.



Create a request from the GTI

Select a **Requester**. **Owner** and **Requested Pickup Location** are auto-populated.

Select **Save** to submit your request. All the details of the request are sent.

Request details

Note

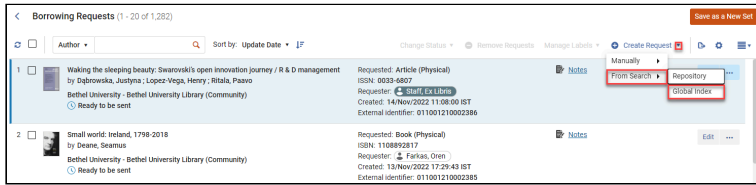
The volume/chapter/page information is not included in the request. The librarian needs to manually edit the request to add this information.

You can also navigate directly to the Advanced search.

Global index Advanced search

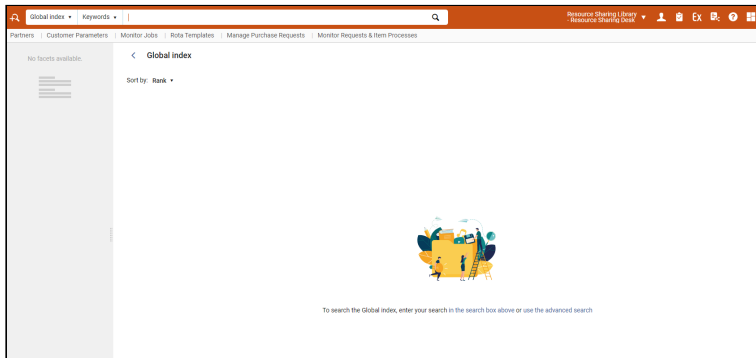
You can also create a request from the **Borrowing Requests** list by selecting **Create Request > From Search > Global**

Index.



Create Request by searching the Global Index

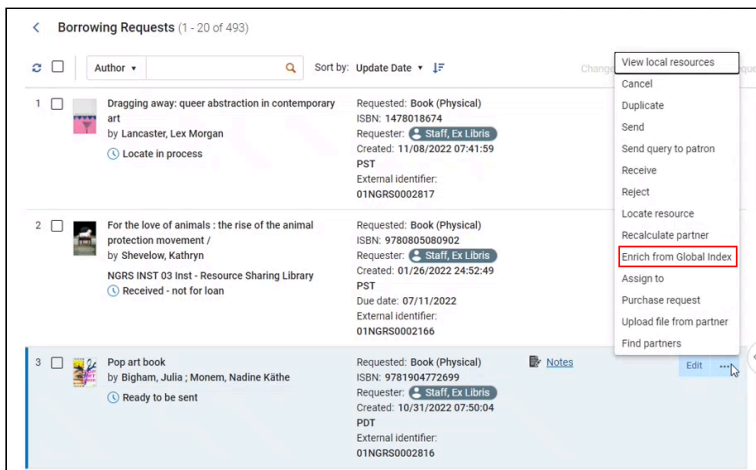
Then enter your search text in the **Global index** search bar or use the **Advanced search**.



Option to search the Global index

Enrich from Global Index

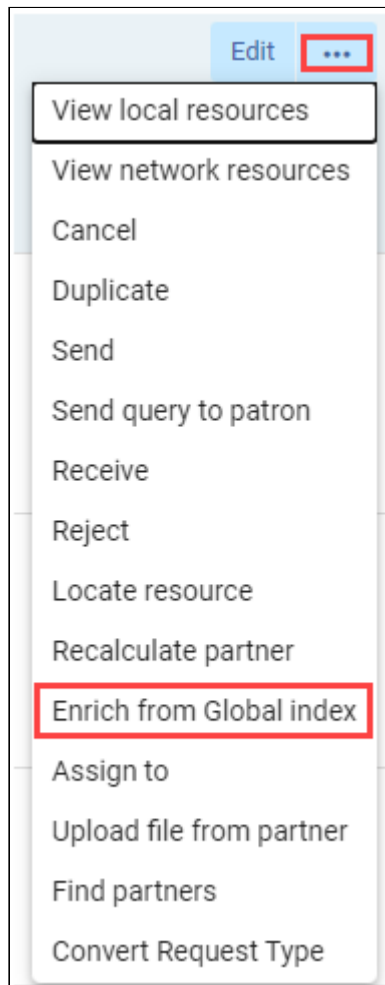
Enrich from Global Index is a workflow action that supports editing and adding additional metadata to a request. This action is useful when enriching requests submitted with incomplete metadata via the blank form. Additionally, when modifications to the request can result in request fulfillment. For example, the user requested via a record that is not held by Rapido partners. Via the Enrich from Global Index action, staff can view if alternative holdings are available and requestable by established partners or potential partners. You can enrich a borrowing request from Global Title index results using the **Enrich from Global Index** action. This automates your current manual work in cases, for example, where poor metadata was provided in the Resource Sharing Blank form.



Enrich from Global Index

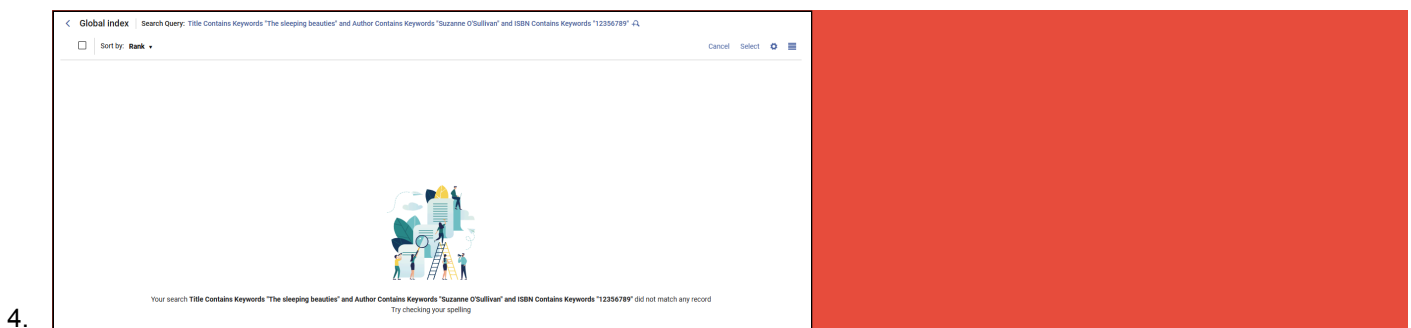
Workflow

1. Select the **ellipses (...)** and select **Enrich from Global Index**.



Enrich from global index

2. After selecting **Enrich from Global Index**, a screen with the current information being searched in the **Global Index** for the request appears.
3. Select the **Search** button. Some of the information in the search may be specific to the record currently being used to request the item. To modify this search, select the linked search query. The values can be modified or removed.



4.

Search Query

- After selecting **Search**, the new results appear. The results can be refined by the facets.

Resource type and language

- After selecting a record, there is visibility into the holdings. If there are pods listed under potential physical pods, the availability via your participating pods is displayed.
- If a record is held by a pod that your library participates in, then potential physical pods are not displayed. However, potential physical lenders are displayed, identifying potential libraries to establish connections with, showing the availability and request ability. This information indicates whether the potential lender has enabled data sharing (**Configuration > General > General Configuration > Data Sharing Profile**).

Potential physical lenders

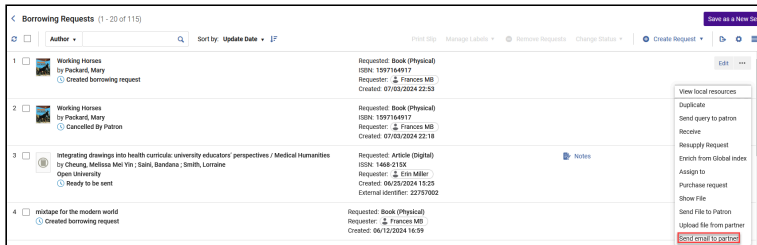
- To use a record with pod terms, check the **Checkbox** for the record and click **Select**. This populates Information from the new record to the Rapido request. It is recommended to remove the **ISBN** from items with multiple ISBNs to get the broadest access to results on the record as Rapido only sends the request to libraries using a specific **ISBN** if an **ISBN** is present.

Communicating with Partners

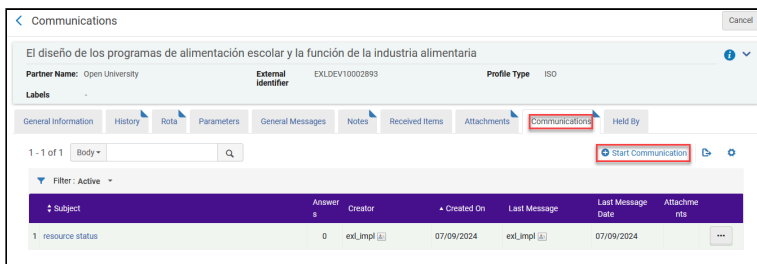
Use this action to email a partner directly from the borrowing task request. This option eases workflows, such as when a borrowing library wants to ask a question or for any type of messages such as a thank you note. These messages are saved in the request for future reference.

To initiate correspondence:

1. Either select the **Send email to partner** action, or from the request **Communications** tab, select **Start Communication**.



Send email to partner



Start Communication

Selecting the **Send email to partner** action or the **Start Communication** button opens the Send email to partner form.

Note

The **From** address is derived from the resource sharing library's shipping address, if configured. Otherwise, it is derived from the preferred email shipping address. Acceptable **To** email addresses are the partner's preferred email shipping address or from the Rapid contact record email. For lending requests, the email address is derived from the contact email address on the resource sharing request.

Send email to partner

From * nosuchmail@no.such.mail.com

To * *Enter Text Here*

Subject * *Enter Text Here*

Body

External identifier: 22646015
Title: El diseño de los programas de alimentación escolar y la función de la industria alimentaria
by: CUEVAS GARCIA, R
ISSN: 1014-806X

Cancel Send Email

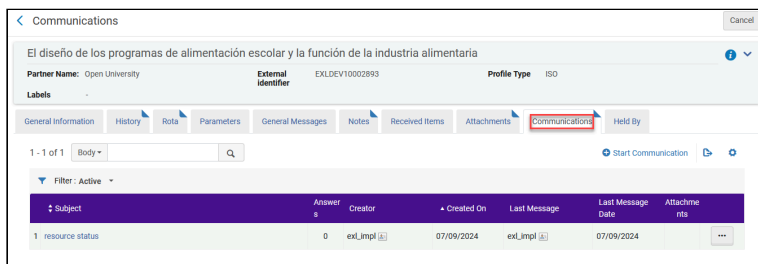
Send email to partner form

After selecting **Send Email**, the partner receives the [Resource Sharing Conversation Letter](#) and a **Communications** notification is added to a request indicating that this request contains correspondence with the partner.



Communications indicator

The correspondence log is accessible from the **Communications** tab.



Communications tab

You can:

- **Edit** a correspondence to view the full correspondence.
- **Reply** to a communication to send another correspondence. Each reply increases the counter in the **Communications** Answers column.
- **Add a Response** to paste the partner's response to your correspondence.
- **Close** the correspondence. Note: Closing the correspondence removes the **Communications** indicator from the request; but the correspondence remains accessible from the **Communications** tab under the **All** or **Closed** filters.

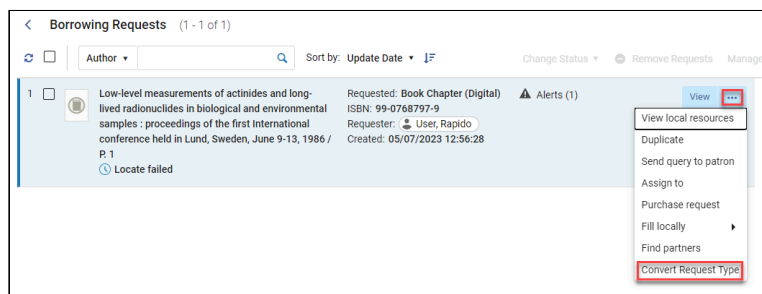


Correspondence actions

Converting a Borrowing Request Type

You can convert a request type placed by a user by using the **Convert Request Type** action from the available actions for the request. This action is available for the following statuses:

- Request created
- Ready to send
- Locate failed
- Rejected
- Resubmit
- Expired
- Recalled
- Pending approval
- Reject
- Bad citation
- Local holding

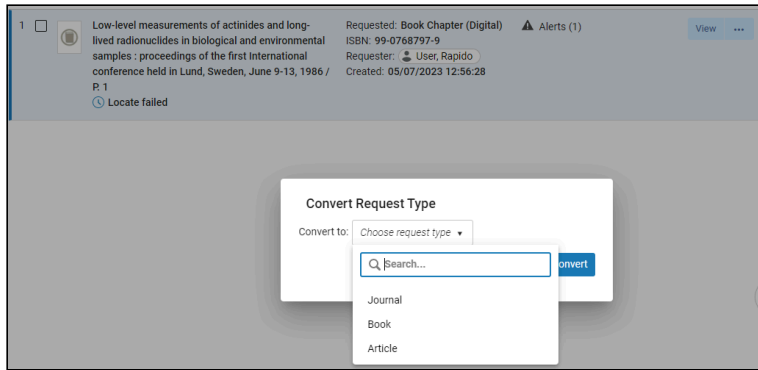


Convert Request Type action

Once this action is selected, you can select the type of request to convert to and add the required information (such as pages or chapter numbers when converting to a book chapter).

Note

The option to convert to Journal is only available if the customer parameter **rapido_show_physical_journal_offer** (**Configuration > Resource Sharing > General > Other Settings**) is enabled.



Convert Request Type options

Once converted, the Request type change is logged in the **History** and the lending request partner is recalculated.

Additionally, when converting a request type, the **Owner** and **Requested Pickup Location** fields are editable.

Note

If the **Owner** only contains one option, the field is not editable.

When changing the **Owner**, the **Requested Pickup Location** updates accordingly. Also see [Associating Pickup Locations with Resource Sharing Members](#). If the value of the **Requested Format** is changed to **Digital**, the **Owner** automatically updates to the default digital owner.

Editable Owner and Requested Pickup Location fields

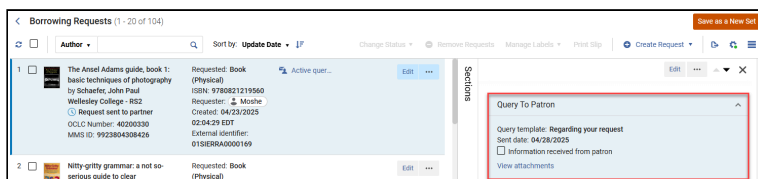
Communicating with Patrons

Sending a Query to a Patron

When emailing a patron using the **Send query to patron** action, a query was sent to patron icon indicates that the QueryToPatron letter was sent from the borrowing library to the patron.

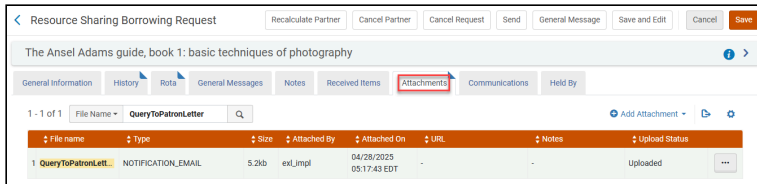
The **Query to patron** section is available from the right pane containing the query details. When checking **Information received from patron** and refreshing the page, the icon is removed from the request.

You can view attachments and query activity by selecting **View Attachments**.



Query to patron details

Query activity is also viewable when editing a request and selecting **Attachments**.



Attachments

You can also filter by the **Need Patron Information** facet for requests with active patron notes and create sets.

Supplied Digitally

Digital Fulfillment

Libraries have the option to mediate or automate the delivery of digitally supplied content to their end users. To mediate the supply, see configuration on document delivery rules: [Borrowing Customization](#).

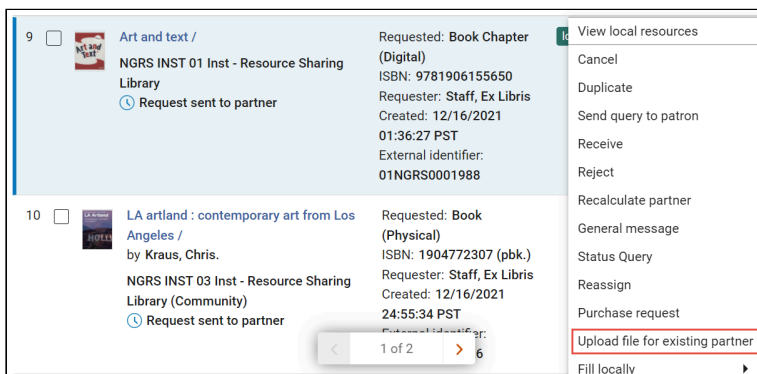
Delivery of this content will require staff to send the received content to users. This can be done via upload file. Material can also be delivered to the end user once made available by the lender without borrowing staff mediation.

To automate the delivery **Send Borrower Document Delivery Rule (Configuration > Fulfillment > Resource Sharing > Send Borrower Document Delivery Rules)**, the default **Send Document Delivery** value is `true`. When set to `true`, documents are automatically forwarded unless a rule is configured to prevent forwarding. In addition to documents, requests filled via URLs can result in automatic fulfillment. **General/fulfillment/other settings/rs_send_url_directly_to_patron** set to `true`.

eBooks

Uploading a Document

Use the **Upload file** action to include attachments along with a request.



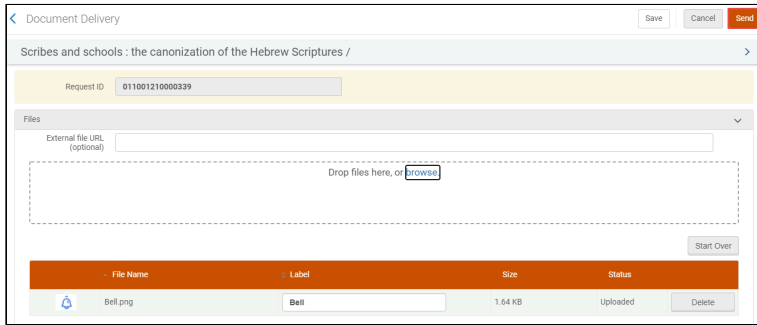
Upload file

Browse to or drag and drop your files to include them with your request.



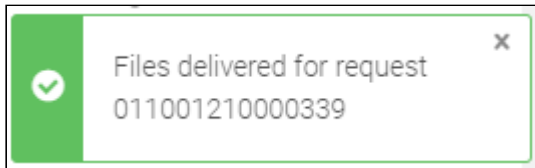
Document Delivery

Your attachments are displayed at the bottom of the window. Select **Send** to submit your documents with your request.



Send document

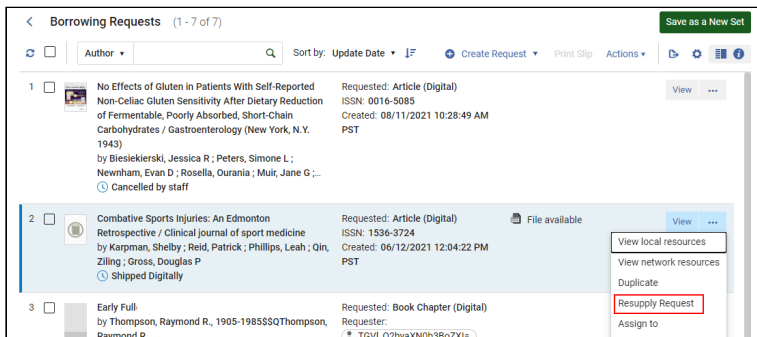
You receive a delivery confirmation message after submitting your request and your request status updates to **Request Completed**.



Delivery confirmation

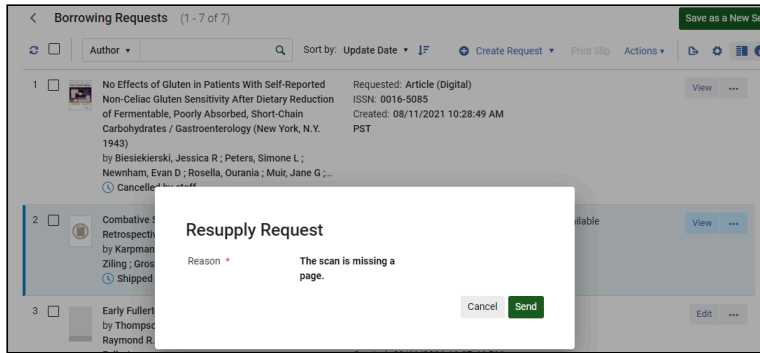
Resupplying a Request

If there is a problem with a digitally supplied request, you can use the **Resupply Request** action to request a new copy from the lender.



Resupply request action

Enter a **Reason** for resupplying the request.



Resupply Request Reason

The status updates to **Request sent to partner**.



Request sent to partner

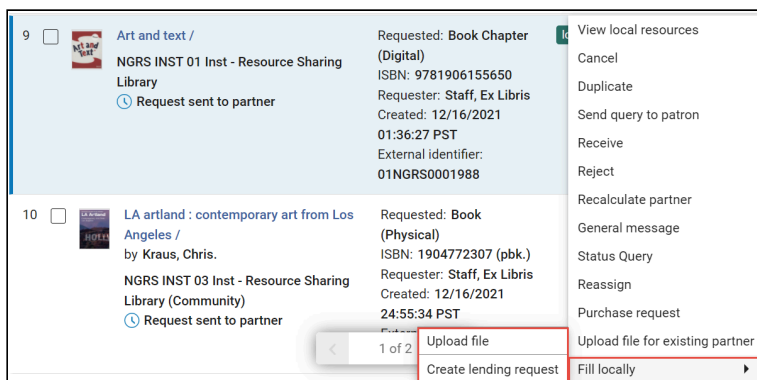
The lender then receives an alert and a note to resupply the request.

Filling a Request Locally

For active, digital requests, use the **Fill locally** action to manually fill a digital request that is readily available.

Note

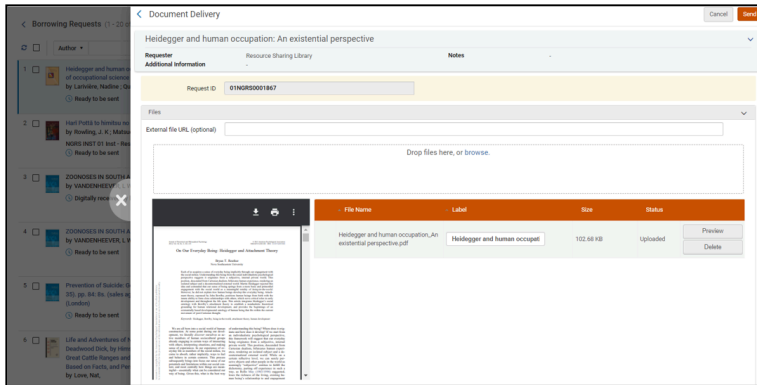
Fill locally is also available for libraries that are closed for lending.



Fill locally - Upload file

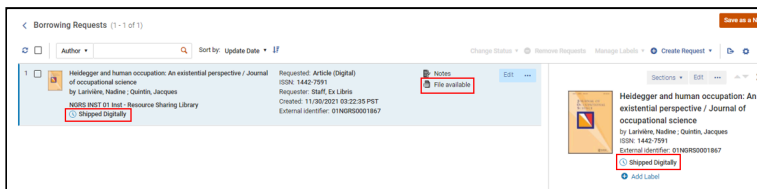
Upon selecting **Upload file**, the Document Delivery window opens for you to upload your digital document.

You can **Preview** your document prior to sending it or **Delete** if you need to cancel or replace the document.



Document Delivery

After sending the document, the Borrowing Request status updates to **Shipped Digitally**, and a **File available** indicator is added to the request.



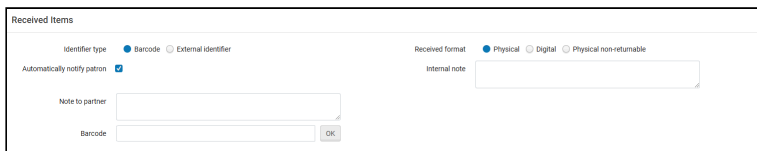
Shipped Digitally

Bad Citation

Supplied Physically

Borrowing Physical Items

When receiving items in Rapido, libraries can update requests to physically received by library from the individual request within their set or task list, or in bulk from the Received Items screen (**Fulfillment > Resource Sharing > Receiving Items**).



Received Items

Library staff can receive items based on either identifier type **Barcode** or **External identifier**. If requests are received by barcode, the system has received barcode information from the lender and the item's barcode is already associated with the request. If requests are received by external identifier, staff can either add the barcode manually to the request or rely on an automatically generated barcode if the parameter **generate_resource_sharing_temp_barcode** (**Configuration > Fulfillment > General > Other Settings**) is set to `true`.

The barcode and external identifier can be included on the following letters which lenders may send with the physical item: Ful Incoming Slip Letter, Resource Sharing Shipping Slip Letter, and the Ful Resource Request Slip Letter. See [Configuring](#)

Rapido Letters.

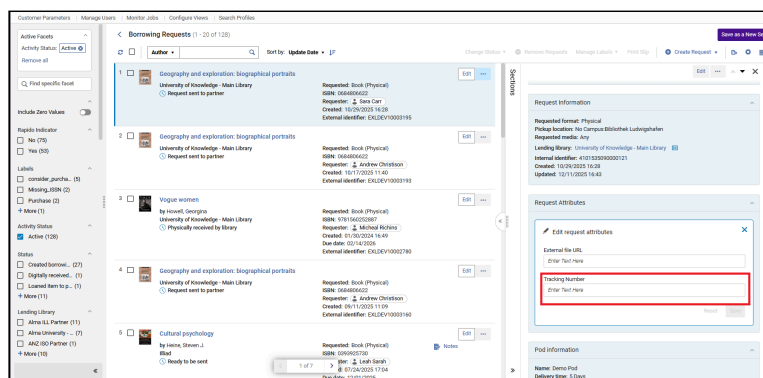
When the Rapido lender configures the parameter **rapido_rs_barcode_for_same_inst_requests_prefix** to `true` (see [Resource Sharing - Other Settings](#)), and a Rapido lender ships a request, the shipped item's barcode is included in the information sent from the lender to the borrower. This enables the borrowing partner to receive the item based on the item's barcode. When staff perform the receiving action, the barcode includes a visible RAPIDO-prefix. The barcode with the RAPIDO- prefix is stored on the temporary item created. The fulfillment actions related to managing the check in and check out do not rely on or provide visibility to the RAPIDO-prefix.

If the lending partner is not a Rapido partner, requests cannot be received by barcode.

If the borrowing partner is a Rapido partner, but the library has enabled the temporary barcode, the library cannot receive the request based on the item barcode. If the parameter **generate_resource_sharing_temp_barcode** ([Configuration > Fulfillment > General > Other Settings](#)) is set to `true`, the borrowing library must receive the request based on the resource sharing request's external identifier (see [External identifier](#)).

Tracking Number

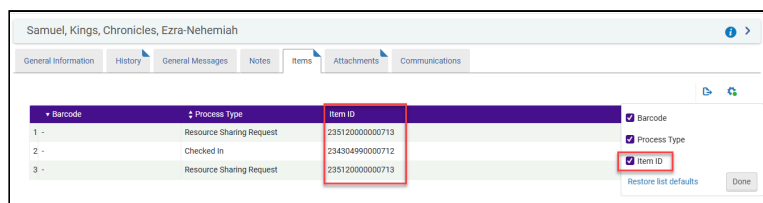
The Tracking Number field is used to record and display the shipment tracking number for a borrowing or lending request. This enables both borrowing and lending libraries to track the physical shipment of an item during the resource-sharing process.



Tracking Number

Shipping Items Without a Barcode

Rapido automatically uses the **Item ID** when shipping items without barcodes. If an item does not include a barcode, the **Barcode** column on the **Items** tab is empty, and the item ID is listed in the Item ID column. This is also applicable for **Multiple Item** options and the **Scan In** interface.



Item ID

Receiving Physical Items

If a request is successfully filled by a Lending library they send a copy of the item for you to process and loan to your library patron. Before you can hand the item to your patron, you must first receive the book in Rapido. In Alma, go to [Fulfillment > Resource Sharing > Receiving](#) Items to receive items and place them on the hold shelf.

Scan the External Identifier on the Rapido paperwork to receive the item. A pop up appears where you can add a temporary barcode. Scan the barcode from inside the item and make sure **Automatically Print Slip** is marked as **Yes**. Click save to receive the item. Because **Automatically Print Slip** was selected, the printouts for the Borrowing Book Bands are triggered and sent to the **Printing Multiple Slips Per Page** cloud app. If **Automatically Print Slip** was not selected, you can still print the slip by clicking the **ellipsis (...)** next to the request and selecting **Print Slip**. Go to the cloud app and print the book bands using the **Printing Multiple Slips Per Page** workflow. Tape the slips around the book and place them on the hold shelf for the patron to retrieve.

Return Items

Once the patron is done with the item they return it to the library. To return the item in Rapido go to Alma and select [Fulfillment > Checkout/Check-In > Return Items](#). Scan the item barcode to return the item. Returning the item automatically triggers the shipping label printing. Go to the cloud app and print the book bands using the **Printing Multiple Slips Per Page** workflow.

Printing for Physically Received Items

The **Print Slip** bulk action enables the library staff to reprint received or returned slips in bulk. When multiple borrowing requests are selected, selecting **Print Slip** reprints all the slips.



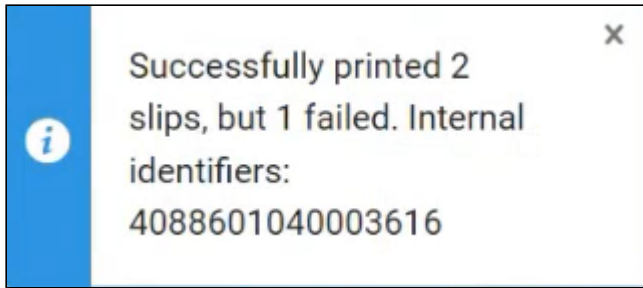
Print Slip

For requests that were not received, no print slip is printed.

For requests that were received but not yet returned, the [Resource Sharing Receive Slip Letter](#) is printed.

For requests that were returned, the [Resource Sharing Return Slip Letter](#) is printed.

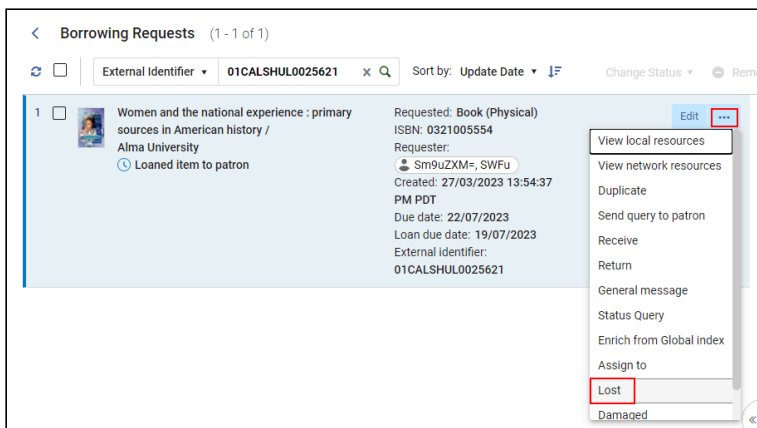
When multiple items are selected, all slips that were received/returned are printed, and a message appears indicating which slips were printed successfully and which slips could not be printed.



Print Slips statuses

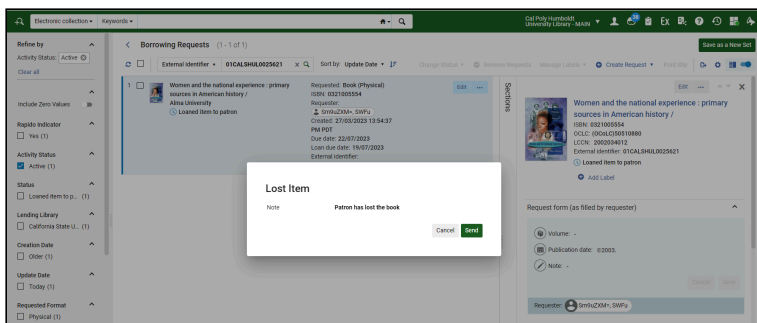
Declaring an Item as Lost

When an item is overdue, and the patron has not returned the item, you can mark the item as **Lost** from the borrowing task list.



Lost borrowing action

The borrower is prompted to enter a note in the **Lost Item** form.



Lost Item note

The borrowing status request updates to **Lost communicated**.

Borrowing Requests (1 - 1 of 1)

External Identifier: 01CALSHUL0025621 | Sort by: Update Date | Change Status

1	<p>Women and the national experience : primary sources in American history / Alma University Lost communicated</p>	<p>Requested: Book (Physical) ISBN: 0321005554 Requirer: Sm9uZXM=, SWFu Created: 27/03/2023 13:54:37 PM PDT Due date: 22/07/2023 Loan due date: 19/07/2023 External identifier: 01CALSHUL0025621 Notes</p>	<p>Edit ...</p>
---	--	--	-----------------

Lost communicated status

After the lender sends the Lost Item message to the borrower with the relevant replacement fee, the fee is displayed in the borrowing request as a message. The lender might also send the [Partners Lost/Damaged Invoice Letter](#). Add the fees to the **Request costs**. To charge the patron, from the borrowing request select **Send Query To Patron**. If configured, the lost item fee appears on the [Query To Patron Letter](#).

Sections

Women and the national experience : primary sources in American history /
ISBN: 0321005554
OCLC: (OCoLC)50510880
LCCN: 2002034012
External identifier: 01CALSHUL0026202
Lost communicated
Add Label

Request costs

Edit request costs

Shipping cost: USD

Lost/Damaged item fee: USD

Patron request cost: USD

Patron receive Cost: USD

Reset Save

Request costs

Applying Lost Fees

In order to discourage patrons from losing items, this feature enables the borrowing library to charge patrons a fee for losing an item, even if the lending library does not charge a fee, and even if the item is ultimately found.

When configured (see [Lost Items](#)), a **Lost Item Fine** is automatically added to the patron's account in addition to the **Lost Item Replacement Fee** when an item is marked as lost or when the number of lost profile days have passed, based on the borrowing library's settings in the library loan Terms of Use (TOU).

Creation Date	Fine/Fee Types	Status	Status Date	Comment	Fee Owner	Title	Item Barcode	Original Amount	Remaining Balance
17/05/2023	Lost item replacement fee	Active	17/05/2023	-	Resource Sharing Library	Women and the national experience: primary sources in American history /	3050001286...	25.00 USD	25.00 USD
17/05/2023	Lost item process fee	Active	17/05/2023	-	Resource Sharing Library	Women and the national experience: primary sources in American history /	3050001286...	15.00 USD	15.00 USD

Patron Lost item fines and fees

Additionally, the Lost Item Bill letter is emailed to the patron notifying them of the fees they owe.

Lost Item Bill 17/05/2023

This is to inform you that the item with the details below borrowed by you has been declared as Lost.

Lost Item: Women and the national experience : primary sources in American history /
 Description:
 Author :Skinner, Ellen.
 Library :Jama University
 Loan date :17/05/2023
 Due date :06/09/2023
 Barcode :30500012860255
 Call Number :9H21.410

You will be charged the following Fines and Fees:

Fee Type	Fee Amount	Note
Lost item replacement fee	25.00 USD	
Lost item process fee	15.00 USD	

Sincerely,
 Access Services Department

Lost Item Bill

If the patron finds the lost item, when the borrower either selects **Found Item** is selected from the Patron Services or selects **Checked in** from the task list, the following messages appear indicating that the replacement fee is refunded; however, the active balance for the Lost item process fee remains.

✘

- Could not determine the next action for the item. Please contact the fulfillment administrator to check the configuration of the item.
- Lost item check in:100.0 % of 25.00 USD replacement fee will be refunded
- Item that was lost has been checked in.

Messages indicating item was found and refund amount

Creation Date	Fine/Fee Types	Status	Status Date	Comment	Fee Owner	Title	Item Barcode	Original Amount	Remaining Balance
17/05/2023	Lost Item process fee	Active	17/05/2023		Resource Sharing Library	Women and the national experience : primary sources in American history /		15.00 USD	15.00 USD

Remaining fee

The Lost Item Replacement Fee Refund letter is sent informing the patron that they are only responsible to pay the Lost item replacement fee.

Fee Type	Fee Amount	Note
Credit	-25.00 USD	
Lost item process fee	15.00 USD	
Lost item replacement fee	25.00 USD	
Total:	15.00 USD	

Lost Item Replacement Fee Refund

Conditional Requests (Borrowing)

New! When a lending library marks a request as **Conditional**, it receives the Conditional status and appears in the Borrowing side's Conditional set in Rapido. To respond to the conditions, go to the **Conditional Set**.

The Lending library may have attached a note stating why the item was marked **Conditional**.

To review and respond:

1. If the note is available in the request details, select the link to the note.
2. Review the information provided.
3. After reviewing the note, select the ellipsis (...) in the request.
4. Select **Conditional Reply**.
5. A pop-up window appears, displaying the reason the item was marked as **Conditional** and any attached Notes.
6. Add a Note that confirms the terms.

Note

It is very important to add a Note because the request may go back to Being Processed status at the Lending Library, and the lack of notes may make the Lending Library mark the request as Conditional again.

7. Set the **Conditional Answer** to **Yes** or **No**.

Conditional Reply

Conditional Reason Library use only

Conditional Answer Yes No

Note *Enter Text Here*

Conditional Reply

- If **Yes** is selected, the request status reverts back to **Request Sent to Partner**.
- If **No** is selected, the request automatically moves on to the next potential Lender through Rapido.

Specifics for Various Partners

Rapido libraries can connect via Rapido with partners through pods, via peer to peer connections, or via email or ALA partner types. The configurations for these relationships can be found at [Partners](#).

Working with Specific Partner Types (Rapido Partners)

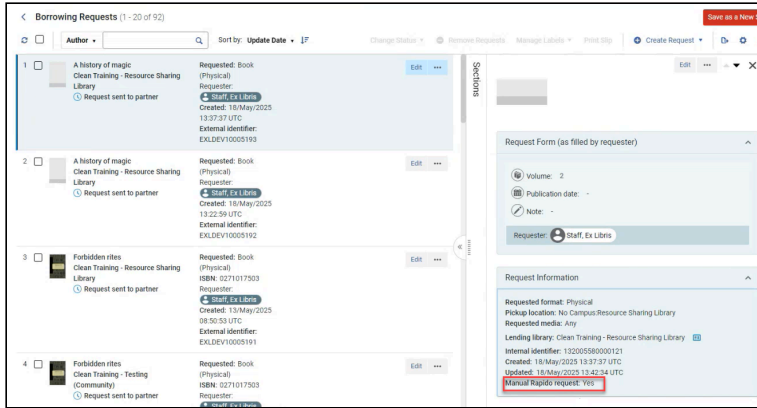
Requests can be manually sent to pod partners if needed. For example, if an item is not included in participating items as it is not typically lendable, but the lender confirmed they will lend this item to the borrower.

To manually send a request to a Rapido partner:

1. From the borrowing request window, select **Send Directly to Partner**.

2. From the Resource Sharing Partner List window, select the Rapido partner to whom you want to send the request.
3. If not already checked, check the **Use Rapido Pod Terms** checkbox.
4. **Save** the request.

The request receives an indication in the right side **Request Information** section that this is a **Manual Rapido request**.



Manual request indicator

If the request is not available for lending, the lending request status is **Locate failed** and the alert **Manual Rapido Request Locate Failed** is added to the request. In this case, the borrowing request status remains **Created borrowing request** and not **Rejected**.

In cases where the request is sent to multiple partners, for example, a Rapido partner and a community partner, if the request is rejected by a Rapido partner, and then sent to a non-Rapido partner, the Change item letter is sent to the borrower indicating that the item terms have changed to **Unknown**. If the request is rejected by a non-Rapido partner, and then sent to a Rapido partner, the Change item letter is sent to the borrower indicating that previously, the item terms were unknown, and now the terms have been updated to pod terms.

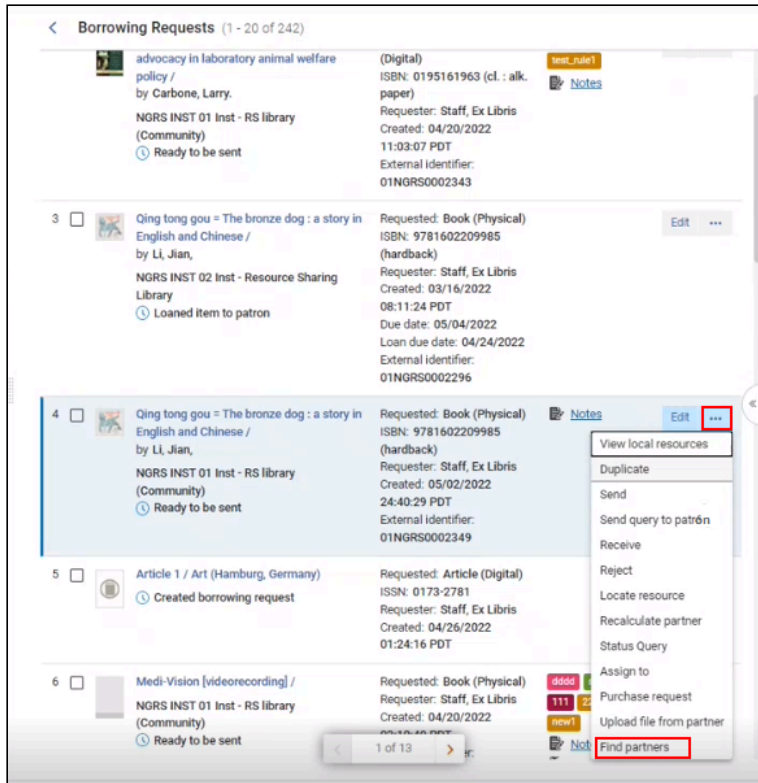
Finding New Partners

To enable you to establish new peer-to-peer partnerships, for circumstances where none of your partners can fill your request or when the requested material is not held by your partners, the Borrowing Request **Find partners** action opens the **Potential Lenders** list of lenders who have the requested resource and can possibly fill the request. This action can be performed as needed. It is useful for requests with **Created borrowing request** or **Rejected by partner** statuses.

For more information, watch [Find Partners](#).

Note

This action is not available for article requests.



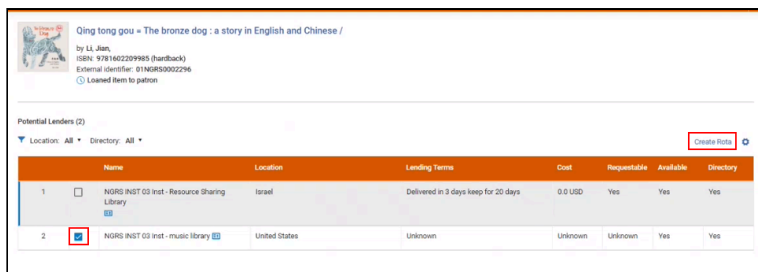
Find partners action

The Potential Lenders list is a list of partners who set their **Data Sharing Profile (Configuration > General > General Configuration > Data Sharing Profile)** to **Yes** to allow shareholding information for resource sharing purposes. This provides an opportunity for your institution to establish new resource sharing partnerships and networks with other institutions that agree to do so. Allowing your institution's holdings information to be shared for this purpose does not mean that your institution is required to allow resource sharing with any other institutions. None of your users' personal data is used.

From the **Potential Lenders** list, select potential lenders, and then select **Create Rota** to add the potential lenders to your rota. The lenders are added to your Rota with a **Pending Status**.

Note

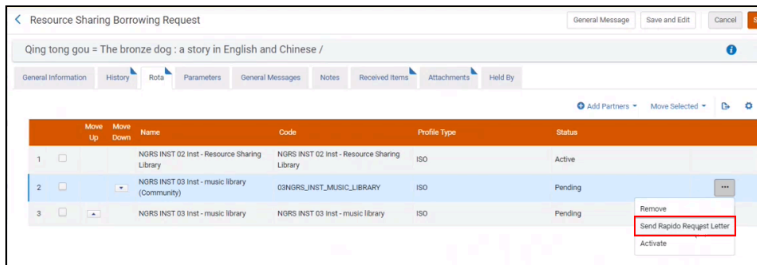
Only Directory members can be added to your Rota.



Potential Lenders

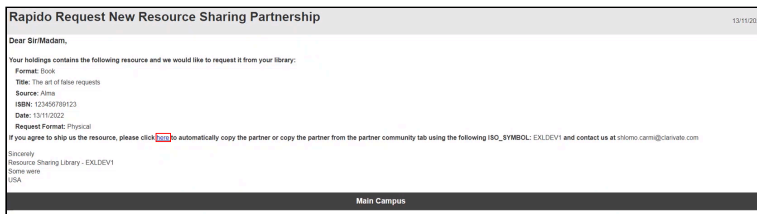
Once a lender is part of your rota, you can email the lender to request a resource using the **Send Rapido Request Letter (Configuration > General > Letters > Letters Configuration > RapidoRequestNewResourceSharingPartnershipLetter)** on the Resource Sharing Borrowing Request page **Rota**

tab. The letter sent to the potential lender should disclose information about the requested material, how to contact the borrowing library, and how to configure the borrowing partner. If the potential lender agrees to lend the resource, the library can contact the borrower to confirm the completion of the configuration and the ability to lend. The borrower can now send the request to them. Once configured, the lender remains in your Rota for future manual requests. Additionally, you can select **Activate** to permanently add the lender to your Rota.



Send Rapido Request Letter

You can add a partner by copying the partner from the **Community** tab (**Fulfillment > Resource Sharing > Partners**), or you can automatically copy the partner using the **here** link on the Rapido Request New Resource Sharing Partnership request letter.

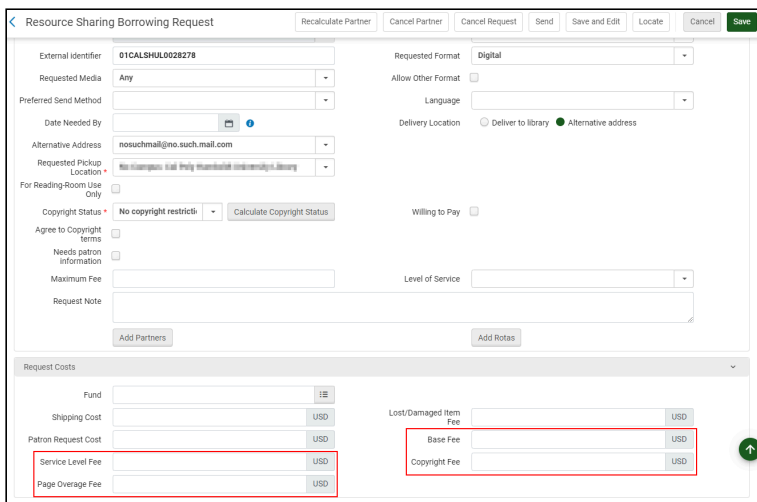


Rapido Request New Resource Sharing Partnership request letter

Applying Shipping Costs

The Resource Sharing Borrowing Request form includes the following **Request Costs** fields:

- Service Level Fee
- Page Overage Fee
- Base Fee
- Copyright Fee

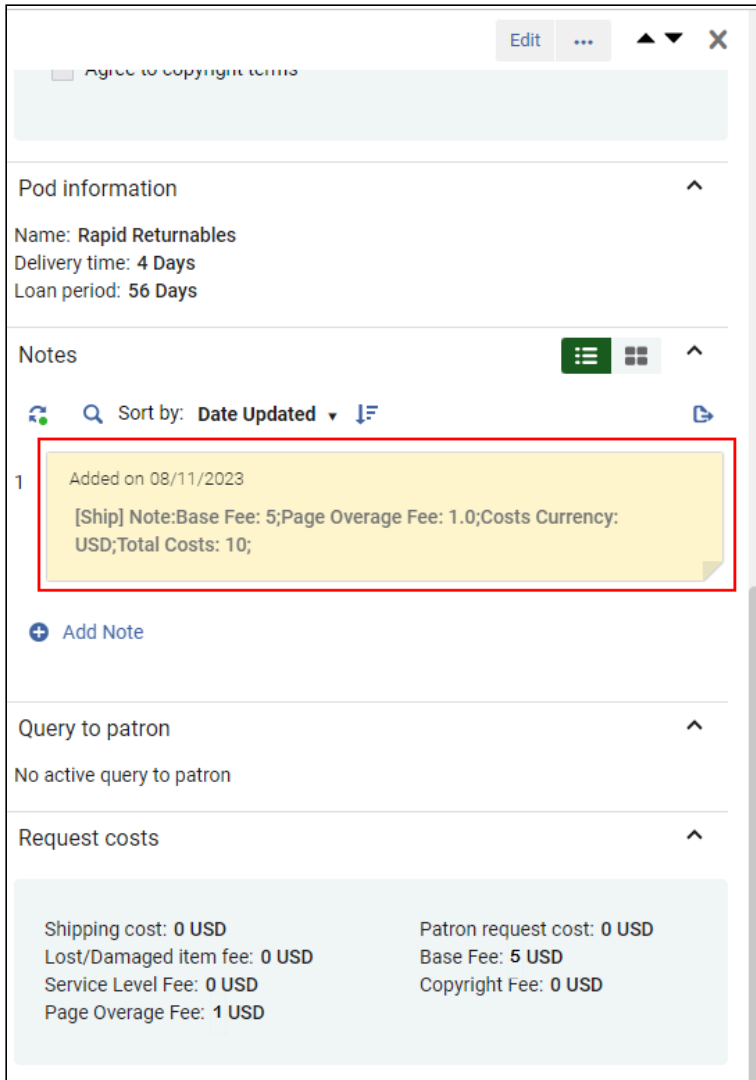


Request Costs Fields

These cost fields are controlled by the **Base fee page limit** ([Configuration > Fulfillment > Resource Sharing > Shipping Cost Lender Rules](#)) parameter. (See [Configuring Shipping Cost Lender Rules](#).)

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

When the costs are applied, a note is added to the borrowing request right pane indicating the costs and the costs are displayed in the **Request costs** section of the right pane.



The screenshot shows a user interface for a borrowing request. At the top, there is a header with 'Edit', a menu icon, and a close icon. Below this is a section for 'Pod information' with details: Name: Rapid Returnables, Delivery time: 4 Days, and Loan period: 56 Days. The 'Notes' section is expanded, showing a note added on 08/11/2023 with the text: '[Ship] Note:Base Fee: 5;Page Overage Fee: 1.0;Costs Currency: USD;Total Costs: 10;'. Below the notes is an 'Add Note' button. The 'Query to patron' section shows 'No active query to patron'. The 'Request costs' section is expanded and displays a table of costs:

Shipping cost: 0 USD	Patron request cost: 0 USD
Lost/Damaged item fee: 0 USD	Base Fee: 5 USD
Service Level Fee: 0 USD	Copyright Fee: 0 USD
Page Overage Fee: 1 USD	

Right pane Note and Request costs

VAT and Total Cost

The **VAT** field is used to record the value-added tax amount associated with the borrowing or lending request. This cost is included in the overall calculation of the request's total cost. The **Total Cost** field displays the combined cost of the request, including any fees and VAT. This value is calculated dynamically based on the entered costs and is not stored in the database.

Request Costs

Edit request costs

Shipping cost USD

Lost/Damaged item fee USD

Patron request cost USD

Base Fee USD

Service Level Fee USD

Copyright Fee USD

Page Overage Fee USD

VAT USD

Total Cost USD

VAT and Total Cost

Creating an ALA Form and Sending it to Partner

In cases where a resource was not found within an institution's resource sharing network, you can auto-generate the ALA form and add it as an attachment to the letter. This reduces the manual work involved in creating ALA forms as part of a last resort mechanism to find partners to fill a borrowing request.

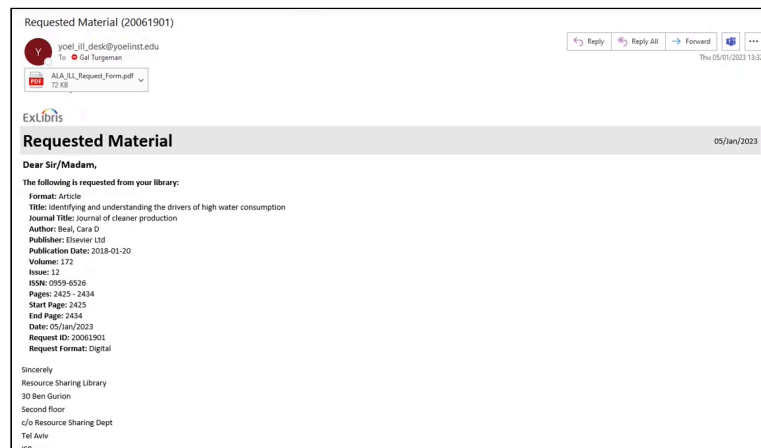
When a borrowing request is sent to a resource sharing partner configured with an ALA **Email Profile Type**, the resource sharing partner receives the request letter with the ALA form attachment. For more information, see [Configuring an ALA Profile Type](#).

The Borrowing Request updates with the ALA partner.



A borrowing request sent to an ALA configured partner

The ALA form is added as an attachment to the request letter.



The ALA form attached to the Requested Material letter

The ALA form fields are populated according to the request metadata.

For physical requests, the **Request for: Loan** checkbox is checked, and the **title** and **author** are added to the text box.

For digital requests, the **Request for: Copy** checkbox is checked, and the **title**, **article/chapter**, **author** (if there is one) are added to the text box.

For resources that are more than five years old, the **Other provisions of copyright law (CCL)** checkbox is checked. Otherwise, the **108 (g) (2) Guidelines (CCG)** checkbox is checked.

ALA Interlibrary Loan Request Form				Revised by ALA RUSA STARS Codes, Guidelines, & Technical Standards Committee (2015)	
Request Date: 05/Jan/2023		Max cost: \$		For Use by Supplying Library	
Request Number: 20061907		Need by:		Date Shipped:	Shipped via:
Requesting Library Name and Address:				Due Date:	
Resource Sharing Library 30 Ben Gurion , Second floor, c/o Resource Sharing Dept Tel Aviv, 1234567890 ISR				Cost: \$	
E-Mail: yoel_ill_desk@yoelinst.edu Phone: 555-5555555				Restrictions:	
Request for: <input type="checkbox"/> Loan: title, author. <input checked="" type="checkbox"/> Copy: journal/book title, article/chapter title, author.				<input type="checkbox"/> Library Use Only <input type="checkbox"/> No renewals	
Identifying and understanding the drivers of high water consumption / Journal of cleaner production, Beal, Cara D				<input type="checkbox"/> Copying not permitted	
Year/Edition: 2018 Volume: 172 Issue: 12 Pages: 2425-2434 ISBN/ISSN: 0959-6526				<input type="checkbox"/> Return insured for: \$	
Request complies with: <input type="checkbox"/> 108 (g) (2) Guidelines (CCG) <input checked="" type="checkbox"/> Other provisions of copyright law (CCL)				<input type="checkbox"/> Packing/shipping requirements:	
Supplying Library Name and Address:				<input type="checkbox"/> Other:	
Hayotzrim 6 Jerusalem, ISR				Not supplied due to: <input type="checkbox"/> At bindery <input type="checkbox"/> In use <input type="checkbox"/> Lacking vol/issue	
E-Mail: ho@name.com Phone: 0555656999				<input type="checkbox"/> Not owned <input type="checkbox"/> Non-circulating	
				<input type="checkbox"/> Poor condition <input type="checkbox"/> Policy or license	
				<input type="checkbox"/> Not on shelf <input type="checkbox"/> Charge exceeds limit	
				<input type="checkbox"/> Not found as cited <input type="checkbox"/> In process/On order	
				<input type="checkbox"/> Other reason:	
				Notes:	
				Renewals	
				Date Requested:	
				New Due Date:	

ALA form

Note

The distorted font for the **Volume**, **Issue**, and **Pages** fields on the generated ALA form is a known issue.

Email Partners

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

Workflow Profiles

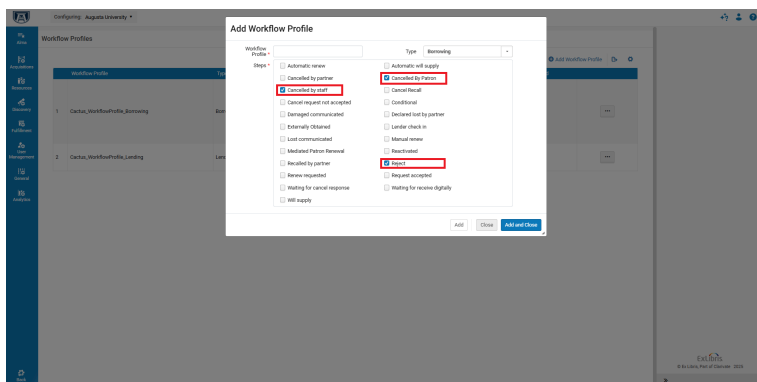
To configure a workflow profile for a DOCLINE partner:

1. Open the Workflow Profiles (**Configuration > Fulfillment > Resource Sharing > Workflow Profiles**).
2. Select **Add Workflow Profile**.
3. Enter a **Workflow Profile** name.
4. Select **Type** Borrowing.
5. Check the **Steps**:
 - **Cancelled by staff**
 - **Cancelled By Patron**
 - **Reject**

Note

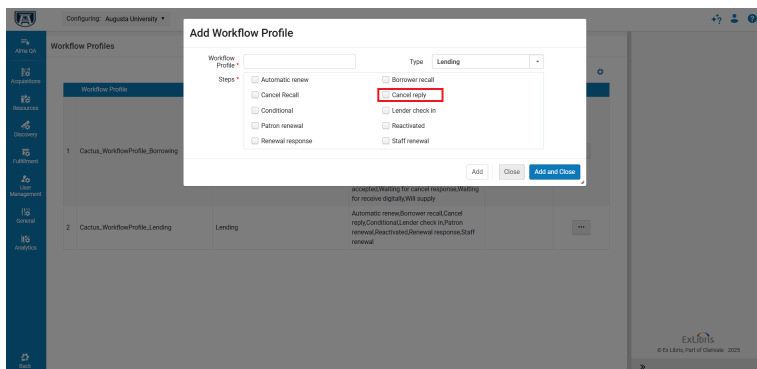
No other workflow profiles are currently supported by DOCLINE.

6. Select **Add** or **Add and Close**.



Borrowing workflow profiles

When configuring a DOCLINE workflow profile, from the workflow profile **Type** Lending, ensure that **Cancel reply** is not checked.



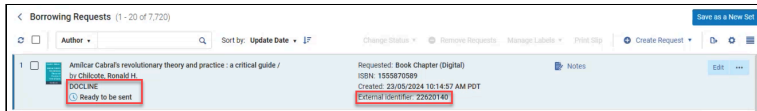
Lending workflow profiles

Rapido-DOCLINE Integration Workflow

Once your DOCLINE partner is created and authorized, you can use the DOCLINE partner for borrowing requests.

Requests can either be sent to a DOCLINE partner manually on a request by request basis, or automatically through a rota.

After sending a request to DOCLINE, the request **External identifier** updates to a DOCLINE identifier.



DOCLINE request

Currently, DOCLINE APIs only support sending and cancelling requests. All other processes related to DOCLINE requests are manual. Library staff must manually change request statuses and upload the files from the partner to the request. Use the **Cancel** action to cancel DOCLINE requests.

For more information, see [DOCLINE Integration Configuration](#).

Partners of Last Resort

For institutions that use an additional system such as **ILLiad** or **WorldShare** for Partner of Last Resort refer to the following:

Receive from ILLiad / WorldShare

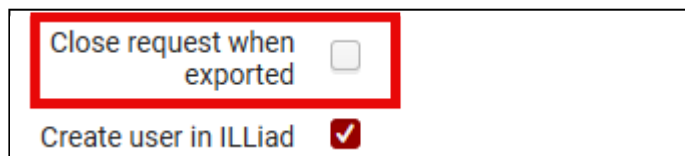
The NCIP Addon enables libraries to automatically push requests completed in ILLiad to Alma/Rapido, allowing items to be checked out at the Circulation Desk using the same workflows as Rapido requests. Additionally, NCIP is only available for ILLiad users, if you use WorldShare, items cannot be pushed to Rapido automatically. If NCIP is unavailable or not working, you can still add items to Rapido manually to achieve similar results.

Receive Active Requests

If your library is set up to keep requests open when they are transferred to ILLiad or WorldShare, receiving the item in Rapido.

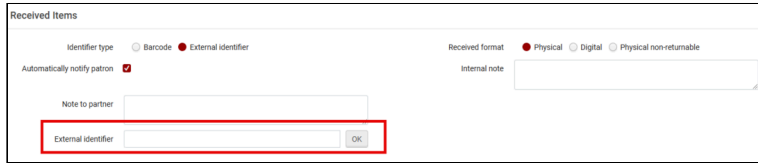
To check this setting:

1. Go to **Fulfillment > Resource Sharing > Partners**, search for your ILLiad or WorldShare partner, then open the **Parameters** tab.
2. Scroll down to find the **Close Request When Exported** option. If this option is unchecked, your requests remains open after being exported to ILLiad or WorldShare.



Close requests when exported

3. If your ILLiad or WorldShare requests remain open, go to **Fulfillment > Resource Sharing > Receiving Items**, enter the **External Identifier** in the External Identifier field, and receive the item as you would any Rapido request. The Rapido External Identifier can be found in the Rapido request under the RefNumber or CitedIn field in ILLiad, or under Transferred Request ID in WorldShare.



External Identifier

Receive Closed Requests

If your library is configured to close requests when they are transferred to ILLiad or WorldShare, you need to reactivate the request before receiving it.

To check this setting:

1. Go to **Fulfillment > Resource Sharing > Partners**.
2. Search for your ILLiad or WorldShare partner.
3. Open the **Parameters** tab.
4. Scroll down to find the **Close Request When Exported** option. If this option is checked, requests closes when exported to ILLiad or WorldShare.

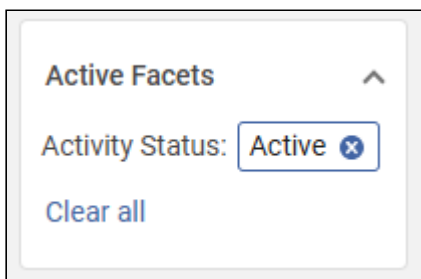


Close requests when exported

If your library automatically closes requests when they are pushed to ILLiad or WorldShare, you need to reactivate the closed request before receiving it.

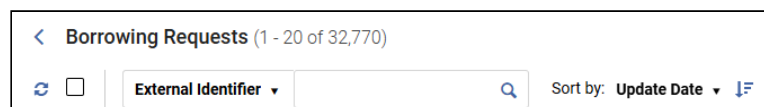
To view all borrowing requests:

1. Go to **Rapido > Borrowing > All Active Borrowing Requests**.
2. In this set, remove the **Active** facet from the facets section on the left side of the screen to display both open and closed requests.



Active facets

3. Change the set search bar to **External Identifier** and search the **External Identifier** to find the request. The Rapido **External Identifier** should be listed in the Rapido request under the RefNumber or CitedIn field in ILLiad or Transferred Request ID in WorldShare.



< Borrowing Requests (1 - 20 of 32,770)

External Identifier Search Sort by: Update Date

External identifier

4. Once you locate the closed request, click the **ellipsis (...)** and select **Reactivate**. The request can now be received like any other Rapido request using the External Identifier. Go to **Fulfillment > Resource Sharing > Receiving Items**, enter the **External Identifier** in the **External Identifier** field, and receive the item. Alternatively, you can receive the item by clicking the **ellipsis (...)** and selecting **Receive** instead of navigating to the **Receiving Items** page.

Receive a Request Originating from ILLiad or WorldShare

If you have a request created in ILLiad or WorldShare that does not exist in Rapido, you can create a Rapido request for the item and then receive it.

To create the request:

1. Go to **Rapido > Borrowing > All Active Borrowing Requests** and select **Create Request > Manually > Book**.
2. Enter the item details and search for the patron in the Requester field.
3. Scroll down and click **Send Directly To Partner**, then search for your ILLiad or WorldShare partner and select it.
4. Save the request.

The newly created request should appear as the first record in the Rapido Borrowing set. If you do not see it:

1. Search by title.
2. Once you locate the request, click the **ellipsis (...)** and select **Receive** to receive the item using the item's barcode.
3. Depending on your settings, you may need to **Reactivate** the request before receiving it.
4. Check ILLiad or WorldShare for duplicate requests; if one exists, cancel the duplicate.