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## Managing Rapido Lending Requests

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### Managing Rapido Lending Requests

Resource sharing comprises borrowing and lending between partners. This page covers resource sharing lending workflows for fulfilling requests from your library's collections and scenarios where your library is the lender.

To manage resource sharing lending requests, you must have a fulfillment service operator or manager in the scope of the resource sharing library to manage lending requests.

In order to manage lending requests, your role is required to be scoped to the resource sharing library.

Refer to [Rapido Article Digital Request](#) and [Rapido Physical Request](#) for an example of a complete end-to-end process.

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### 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**.

When a loan due date is updated because the borrowing library is closed when the loan is due back, the loan due date is pushed to the next open date, and the due date is calculated based on the new loan due date and the pod shipping term. The **Due date** equals the **Loan due date** plus the pod shipping term. For example, if the pod shipping terms are 3 days, and the original **Loan due date** is April 3, 2025, and the **Due date** is April 6, 2025, and the borrowing library is closed between April 5-10, then the new **Loan due date** is April 11, 2025, and the **Due date** is April 14, 2025.

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### 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.

## Note

Adding a note from the right pane adds the note as dismissed, and therefore, the note is not included in the Active Notes facet.

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.

## Note

The available actions depend on the request status.

### Resource Sharing Lending Requests Task List Page

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

### Lending Requests

#### Resource Sharing Lending Request Actions

Actions	Description
Assign to	Use this action to assign the request to a user.
Bad Citation	Indicates that metadata information is missing which prevents the request from being processed.

Actions	Description
Change Due Date	<p>Rapido gives lenders the option to extend a due date for non-expired loans when there is no option to renew the loan. When the lender changes the due date, the borrowing request status updates to <b>Renewed by Partner</b>, and a letter is sent to the patron informing them that the due date is extended.</p>
Checked In	<p>Send an ISO checked-in message to the borrowing library indicating that the item was returned to the lending library. The request closes automatically.</p> <hr/> <p><b>Note</b></p> <p>A checked-in ISO message is only sent if the active partner's workflow profile includes <b>Checked In Message</b> as a valid option (see <a href="#">Configuring Workflow Profiles</a>).</p> <hr/> <p><b>Note</b></p> <p>Using the Checked In action does not change the status of the item and the librarian should scan the item after using this action to ensure the item is marked as back in place or routed back to its place.</p> <hr/>
Conditional	<p>A pop-up window is displayed with a mandatory <b>Reason</b>, a <b>Date for reply</b>, which is the last day the lender will wait to receive an answer from the borrower, and a <b>Note</b> field. When the message is submitted, the request status changes to <b>Conditional</b>. An ISO message is sent to the borrower. When a response is received from the borrower, if the response value is <b>No</b>, the request is rejected. If the value is <b>Yes</b>, the <b>Date for Reply</b> field is cleared, and the request status returns to <b>Created lending request</b>.</p>
<a href="#">Create Digitization Request</a>	<p>Create Digitization Request is available for active requests with physical holdings that are not yet shipped (item_sent_date is empty) and are not cancelled.</p> <p>Selecting the action displays a window with the following options:</p> <ul style="list-style-type: none"> <li>• Optional holdings that can fulfill the request, the number of items, and how many holdings are available for the resource sharing process and the summary holding.</li> <li>• Managing Department - for shipping a digital resource, the Managing Department drop-down list is displayed, enabling the user to select which digitization department receives the digitization request. If only one department is available to manage the request, the Managing Department automatically populates with that department. If more than one value exists, the default value is taken from the rs_default_digitization_department CP if exists.</li> </ul> <hr/> <p><b>Note</b></p> <p>This field is mandatory.</p> <hr/> <ul style="list-style-type: none"> <li>• Option to add a note.</li> </ul> <p>When selecting <b>Create</b>, a digitization request is created for the item. The selected digitization department processes the digitization request.</p> <p>For requested resources that are multi-volume or serial resources (i.e., they include issue/volume/description, etc.), the request form contains the following:</p> <ul style="list-style-type: none"> <li>• New 'Request Specific Item' checkbox (unchecked by default).</li> <li>• When the checkbox is unchecked, the Manual Description field is visible.</li> </ul>

Actions	Description
	<hr/> <p><b>Note</b></p> <p>The field is mandatory and is populated with the patron requested information as shown in the Note field of the request.</p> <hr/> <p>When the checkbox is checked, dropdown lists display for the Year, Volume, and Description. The Description is mandatory because it is required to fulfill the request (based on the currently selected holding). The Year and Volume help narrow down the description field values.</p>
<p><a href="#">Create Move Request</a></p>	<p>Available for requests with physical holdings that are not yet shipped (<b>item_sent_date</b> is empty) and are not cancelled.</p> <p>Selecting this action displays a window with the following information and options:</p> <ul style="list-style-type: none"> <li>• Library – with the name of the library that holds the holding</li> <li>• Availability – this field contains two date options: <ul style="list-style-type: none"> <li>◦ If the record does not have a summary holding, the number of items and how many of them are available for the resource sharing process displays</li> <li>◦ If the record has a summary holding, the availability field displays the summary holding</li> </ul> </li> <li>• Summary holding value - the summary holding value can be very long. If the value is too long, the column will contain part of the value and three dots at the end that represent the full summary holding. Hover over the field to see the full value in a tool-tip.</li> <li>• Option to add a note.</li> </ul> <p>When selecting <b>Create Request</b>, a move request is created for the item. The item is always delivered to the resource sharing library that created the move request.</p> <p>For requested resources that are multi-volume or serial resources (i.e., they include issue/volume/description, etc.), the request form contains the following:</p> <ul style="list-style-type: none"> <li>• New 'Request Specific Item' checkbox (unchecked by default).</li> <li>• When the checkbox is unchecked, the Manual Description field is visible. This field should only be used when the request is for a title that does not have any items since it creates a general move request and not a request that is placed for a specific item. See <a href="#">Multi-Volume Resource Sharing Workflow</a>.</li> </ul> <hr/> <p><b>Note</b></p> <p>The field is mandatory and is populated with the patron requested information as shown in the Note field of the request.</p> <hr/> <p>When the checkbox is checked, dropdown lists display for the Year, Volume, and Description. The Description is mandatory because it is required to fulfill the request (based on the currently selected holding). The Year and Volume help narrow down the description field values.</p>
<p>Detach from MMS</p>	<p>Detach a lending request from its inventory.</p>
<p>Download Electronic Resource</p>	<p>Used for retrieving electronic resources. When selecting this action, you are directed to the resource owned by the library in order to fulfill the lending request.</p>

Actions	Description
Duplicate	<p>Create a new request based on the existing one. The Resource Sharing Request page opens, and you can modify the request parameters in the Request Attribute section as needed.</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"> <li>• Request Status</li> <li>• External identifier</li> <li>• Format</li> </ul>
<a href="#">General message</a>	<p>Send a general message with a lending request to the borrower.</p> <hr/> <p><b>Note</b></p> <p>You can also use the General message action to recall an item since there is no dedicated Recall action in Rapido.</p> <hr/>
Locate resource	<p>Displayed for requests that do not have an inventory attached to find a resource and attached to the request for further processing.</p> <hr/> <p><b>Note</b></p> <p>If the locate is not successful, use the <a href="#">Reject</a> action to reject the request.</p> <hr/>
<a href="#">Lost</a>	<p>Sends the borrower details about the fee for the lost item.</p>
Print slip	<p>Print a call slip for the item containing both the external ID and barcode of the item.</p> <p>For requests that have not yet been shipped, this option prints an incoming request slip, Full Incoming Slip Letter. For requests that have already shipped, this option prints a shipping slip, Resource Sharing Shipping Slip Letter, containing additional information specific to the item being shipped.</p> <p>For information on these slips, see <a href="#">Configuring Alma Letters</a>.</p>
Reactivate	<p>This action is available when:</p> <ol style="list-style-type: none"> <li>1. The Operator has the Reactivate privilege in the scope of the owner of the request.</li> <li>2. Appears only when <b>Reactivated</b> is enabled in the Lending Workflow Profile. See <a href="#">Adding Workflow Profiles</a>.</li> <li>3. The Status is one of the following: REQUEST_COMPLETED, EXPIRED, REJECTED, CANCELLED.</li> </ol> <p>Selecting this option reactivates a completed peer-to-peer resource sharing request. The shipped item's process status changes to <b>In resource sharing</b> and the item is relinked. The request status changes to <b>Request Reactivated</b>. The request's original external ID is maintained.</p>

Actions	Description
Reject	<p>This action is used by lenders to reject an incoming request. Reject is only visible if the workflow option <b>Reject</b> is enabled. The lender's rejection updates the borrower request automatically if the borrower/lender communication is using one of the protocols such as ISO 10160 or ISO 18626. When rejecting a lending request you must enter a reason. The reasons are transferred to the borrowing library, so a common set of reasons is used. The list can be found <a href="#">here</a>.</p>
Release assign	<p>Enables you to unassign an assigned request from a user.</p>
<a href="#">Resupply Request</a>	<p>When <b>RESEND_REQUEST_RECEIVED</b> (<b>Configuration &gt; Resource Sharing &gt; Configuration &gt; Manage Lending Alerts</b>) is configured, Rapido includes alerts to notify lenders when the borrowing institution uses the <b>Resupply Request</b> action.</p>
Search in Market	<p>When selecting the <b>Search in Market</b> action, the Rialto results are displayed in a slider window, enabling you to purchase materials in a streamlined end-to-end workflow.</p> <p>See <a href="#">Rapido-Rialto Integration</a>.</p>
<a href="#">Send email to partner</a>	<p>Use this action to email a partner directly from the lending task list request. This option eases workflows, such as when a lender wants to convey limitations or for any type of messages such as a thank you note. These messages are saved in the request for future reference.</p> <p>Correspondence can be initiated using the <b>Send email to partner</b> action or from the <b>Start Communication</b> button on the <b>Communications</b> tab.</p>
<a href="#">Send Invoice Lost/Damaged Invoice</a>	<p>When the request includes a <b>Shipping date</b>, and the <b>Lost/Damaged item fee</b> is populated in the right pane of a request, and the <b>Lost/Damage Invoice Printed</b> value is <b>No</b>, the <b>Send Invoice Lost/Damaged Invoice</b> action is available.</p>
Ship item Physically	<p>Ship the item associated with the request.</p> <p>Once the files ship, the request updates to either <b>Shipped Physically</b> or <b>Request Completed</b> depending on whether the <b>Complete the request</b> checkbox is selected on the Shipping Physically page.</p>
<a href="#">Ship item digitally</a>	<p>Ship the item associated with the request.</p> <p>Add the relevant files to the lending request (i.e. have not been created as part of a digitization workflow). Once the files are uploaded, you can preview them to see that you have selected the correct resource. After selecting <b>Send</b>, the request updates to either <b>Shipped Digitally</b> or <b>Request Completed</b> depending on whether the <b>Complete the request</b> checkbox is selected on the Shipping Digitally page.</p>

Actions	Description
	<hr/> <p><b>Note</b></p> <p>For this feature, your browser settings must be configured to allow viewing of PDF files.</p> <hr/>
Status Query	<p>Request a status update from the borrowing institution. This is only applicable to ISO partners.</p> <p>The returned lender ISO status is recorded in a note. Each ISO status corresponds to the following Alma request statuses:</p> <ul style="list-style-type: none"> <li>• Not supplied - Rejected the borrower request, Locate failed, Expired</li> <li>• Pending - Created lending request, Being processed, Will Supply, Non expiring</li> <li>• In Process - Staff renewal, Renewal response</li> <li>• Cancel Pending - Cancel reply</li> <li>• Canceled - Canceled</li> <li>• Shipped - Shipped Physically, Shipped Digitally</li> <li>• Received - Received by partner</li> <li>• Renew Pending - Renew requested, Patron renewal</li> <li>• Overdue - Overdue request</li> <li>• Returned - Returned by partner</li> <li>• Checked In - Lender check in, Request Completed</li> <li>• Recall - Recalled item</li> <li>• Lost - Lost</li> <li>• Unknown - Damaged, all other</li> </ul>
Will supply	<p>Update a request that has not yet shipped with a <b>Will Supply</b> status. This is only displayed when the request is not yet shipped and the borrowing partner's workflow includes Will Supply (see <a href="#">Configuring Workflow Profiles</a>).</p>

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## Rapido Layout

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### Sorting by

To efficiently organize your lending requests, you can sort lending requests by location. After selecting **Sort by: Shelving Location**, when printing pickup slips, the pickup slips are printed in order by shelving location.

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**Note**

This is only relevant for requests that have not yet shipped.

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The screenshot shows a 'Lending Requests' interface with a list of four requests. A dropdown menu is open for the first request, showing options like 'Last Interest Date', 'Update Date', 'Creation Date', 'Title', and 'Shelving Location'. The 'Shelving Location' option is highlighted with a red box.

Request ID	Title	Requested Item	Created	Assigned to
1	W.H. Auden (electronic resource) / ISOPartner	Created lending request		
2	art	Created lending request	02/28/2021 15:02:39 IST	Staff Ex Libris
3	Life and Adventures of Nat Love, Better Known in the Cattle Country As Deadwood Dick, by Himself : a True History of Slavery Days, Life on the Great Cattle Ranges and on the Plains of the Wild and Woolly West, Based on Facts, and Personal Experiences of the Author / by Love, Nat	Requested: Book (Physical)	05/23/2021 09:33:42 IDT	
4	Art and text / NGRS INST 01 Inst - Resource Sharing Library	Requested: Book (Physical)	09/09/2021 18:14:28 IDT	

## Shelving Location

## Rapido Sets

Use **Rapido Sets** to manage outstanding lending requests (**Rapido Sets > Lending Requests > select a borrowing set**). Selecting **All active lending requests** or a specific set enables you to manage your workflow actions. For more information, see [Rapido Sets](#).

The screenshot shows the 'Resource Sharing Requests' interface with the 'Lending' tab selected. It displays a list of active lending requests categorized by status, with counts for each category.

Category	Count
All active lending requests	38
New	
Today	0
Late for processing	0
locate failed	8
In Process By Branch Library	15
In Process	
My requests	25
not sent yet	27
Digital Requests	3
Being processed and created	19
Closed	

## Lending Resource Sharing Requests

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## Rapido 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.

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### Note

The available actions depend on the request status.

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#### Resource Sharing Lending Request Statuses

Action	Description
Being Processed	An internal fulfillment request was created and is awaiting staff processing.
Cancel reply	This status is not currently supported.
Cancelled	The request was cancelled by either the borrower or the lender.
Conditional	The lender was responded with a conditional response.
Created lending request	The initial status prior to being processed can either be processed or moved to branch to be processed.
Damaged	This status is triggered automatically if the borrower reported that the item is damaged.
Deleted	The library chose to delete the request and will not see the request.
Expired	The request expired and is no longer actionable by this lender.
Lender check in	<p>This is a manually set status that sends a confirmation message to the borrower that the item was checked in.</p> <hr/> <p><b>Note</b></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> <hr/>
Locate failed	The incoming request was not located automatically and the staff must locate the resource manually.
Lost	The borrower has updated the status to lost.
Lost and fee communicated	This status is set when the lender used the <b>Lost</b> action to report the lost item fee to the borrower.
Overdue request	The due date for the request passed.
Pending Auto Reject	This status is sent when the request is waiting to be automatically rejected.
Reactivated	<p>This status is set after the <b>Activate</b> action is used and is awaiting the next action.</p> <hr/> <p><b>Note</b></p> <p>To enable this feature, you must contact Ex Libris Support.</p> <hr/>
Recalled item	The <b>Recall</b> action was performed with the p2p partner.

Action	Description
Received by partner	The borrower received the shipped item
Rejected the borrower request	The lender rejected the borrower request.
Renew requested	The borrower has requested renewal.
Renewal Accepted	The lender has accepted the renewal.
Request Completed	The request was completed.
Returned by partner	The borrowing library has returned the item.
Shipped Digitally	The lender has supplied the requested item digitally.
Shipped Physically	The lender has shipped the requested item.
Will Supply	The lender used the Will supply action to indicate that they will fulfill the request, but they have not yet fulfilled the request.

## Managing Lending Alerts

Alerts can be attached to a lending request during the main steps of a request's workflow. For information on configuring lending alerts, see [Configuring Lending Alerts](#). When a request includes an alert, the alert icon



is visible on the request. Additionally, the right pane indicates the type of alert.

The screenshot shows the 'Lending Requests' interface. On the left, a list of five requests is displayed, each with a status icon (e.g., 'Being Processed', 'Created lending request'). The right pane shows the details for a selected request, including 'Fulfillment request information', 'Notes', 'Alerts', and 'Request costs'. A red box highlights an alert in the 'Alerts' section: 'Request Cost Exceeds Maximum Borrowing Cost Allowed'. Below the alert, there is a 'Remove Alerts' button. The 'Request costs' section lists various fees such as Shipping cost, Base Fee, Copyright Fee, and Service Level Fee.

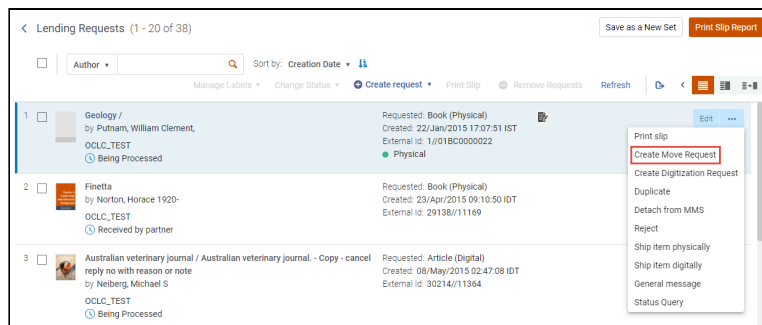
### Alert

The alerts show the progress of the request (**In Process**, **Canceled**, or **Completed**). After noting the alert information, dismiss the alert by selecting **Remove Alerts**.

## Workflows

## Creating a Move Request

Use the **Create Move Request** action to assign physical requests that have not yet shipped to the relevant library.



### Create Move Request action

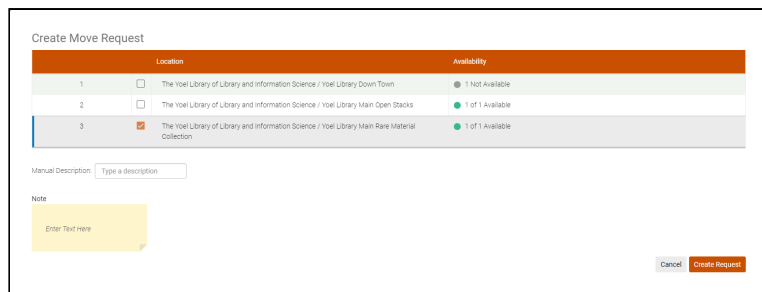
Selecting this action displays a window with the following information and options:

- **Location** – the name of the library that holds the holding
- **Availability** – this field contains two options:
  - If the record does not have a summary holding, the number of items and how many of them are available for the resource sharing process displays
  - If the record has a summary holding, the availability field displays the summary holding

### Note



indicates that a record is suppressed.



The 'Create Move Request' dialog box contains a table with two columns: 'Location' and 'Availability'. It lists three items for selection. Below the table is a 'Manual Description' field and a 'Note' section with a text area. At the bottom right are 'Cancel' and 'Create Request' buttons.

	Location	Availability
1	<input type="checkbox"/> The Yoel Library of Library and Information Science / Yoel Library Down Town	<input type="radio"/> 1 Not Available
2	<input type="checkbox"/> The Yoel Library of Library and Information Science / Yoel Library Main Open Stacks	<input type="radio"/> 1 of 1 Available
3	<input checked="" type="checkbox"/> The Yoel Library of Library and Information Science / Yoel Library Main Rare Material Collection	<input type="radio"/> 1 of 1 Available

### Create Move Request options

### Note

If you do not select a library, the most sensible library will be chosen for you.

When selecting **Create Request**, a move request is created for the item, and the status updates to **Being Processed**. The item is always delivered to the resource sharing library that created the move request.

For requested resources that are multi-volume or serial resources (i.e., they include issue/volume/description, etc.), the request form contains the following:

- **New Request Specific Item checkbox (unchecked by default).**
- **When the checkbox is unchecked, the Manual Description field is visible.**

The field is mandatory and is populated with the patron requested information as shown in the Note field of the request.

When the checkbox is checked, dropdown lists display for the Year, Volume, and Description. The Description is mandatory because it is required to fulfill the request (based on the currently selected holding). The Year and Volume help narrow down the description field values.

## Creating a Move Request Configuration

Rapido automatically creates move requests for journal articles found using Rapid while enabling a manual process for those that were not found in the Rapid Pods.

### Note

Requests are not created automatically for lending requests that were added manually.

Use this setting when **pick from shelf** and **digitization** are processed by a library branch rather than a resource sharing library.

This configuration automatically updates the lending request status to **being processed** and automatically creates a move or digitization request based on the requested format.

You have the option to exclude automating requests:

- For serial items — if the lender inventory includes items with distinction
  - Always
  - For non-RapidiLL partners
- For multi-volume items — for requests that include a specific volume
- When items are available in multiple branches

### Move to Branch Automation

## Creating a Digitization Request

Use the **Create Digitization Request** action to assign digital requests that were not yet delivered to the relevant library.



## Create Digitization Request action

Selecting the action displays the following options:

- Optional holdings that can fulfill the request, the number of items, and how many holdings are available for the resource sharing process and the summary holding.
- Managing Department - for shipping a digital resource, the Managing Department drop-down list is displayed, enabling the user to select which digitization department receives the digitization request. If only one department is available to manage the request, the Managing Department automatically populates with that department. If more than one value exists, the default value is taken from the **rs\_default\_digitization\_department** customer parameter if it exists.
- Option to add a note.

	Location	Availability
1	<input type="checkbox"/> The Yoel Library of Library and Information Science / Yoel Library Down Town	● 1 Not Available
2	<input type="checkbox"/> The Yoel Library of Library and Information Science / Yoel Library Main Open Stacks	● 1 of 1 Available
3	<input type="checkbox"/> The Yoel Library of Library and Information Science / Yoel Library Main Rare Material Collection	● 1 of 1 Available

Managing Department: Institutional Digitization Department

Note  
● Add Note

Cancel Create Request

## Create Digitization Request options

### Note

If you do not select a library, the most sensible library will be chosen for you.

When selecting **Create Request**, a digitization request is created for the item, and the status updates to **Being Processed**. The selected digitization department processes the digitization request.

For requested resources that are multi-volume or serial resources (i.e., they include issue/volume/description, etc.), the request form contains the following:

- 'Request Specific Item' checkbox (unchecked by default)
- When the checkbox is unchecked, the Manual Description field is visible.

The field is mandatory and is populated with the patron requested information as shown in the Note field of the request.

When the checkbox is checked, dropdown lists display for the Year, Volume, and Description. The Description is mandatory because it is required to fulfill the request (based on the currently selected holding). The **Year** and **Volume** help narrow down the description field values.

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## Shipping Directly from Branch

To enable branches to ship resources directly from a borrowing institution instead of sending the request to the associated resource sharing library, select **Ship resource sharing resources directly (Configuration > General > Libraries > Add a Library or Edit Library Information)**. When **Ship resource sharing resources directly** is checked, and the staff has fulfillment privileges in the library defined to allow shipping of resources directly from the branch while at the scope of that library, the **Shipping Items** menu (**Fulfillment > Resource Sharing > Shipping Items**) and the **Scan In Item** page > **Shipping Items** button are visible. The user can use either one of them to ship the resource. The resource sharing request is then updated accordingly (for example, Shipped Physically). For more information, see [Enabling Branches to Ship Directly](#).

We recommend setting the move to branch to automatic, (see [Create Move Request Configuration](#)). This creates the fulfillment request for the staff at the branch to handle without needing to access the resource sharing requests task list.

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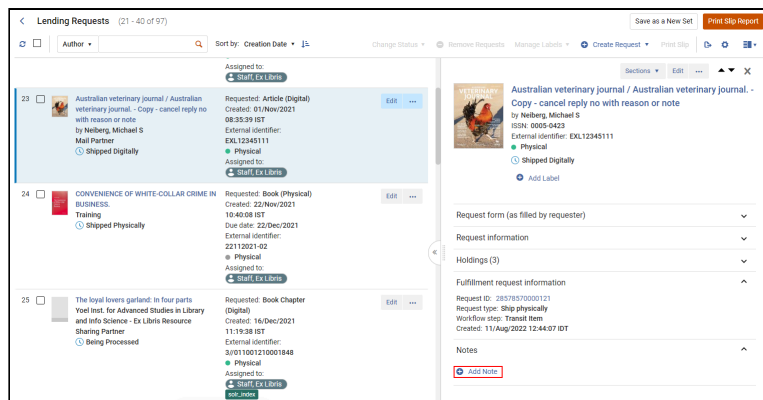
## Workflow Actions

Several actions are available to ease the workflow:

- [Dismissing an alert](#)
  - [Adding a note](#)
  - [Sending an invoice](#)
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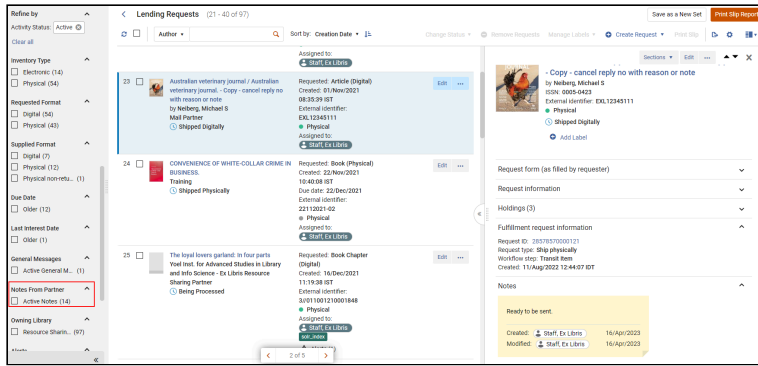
## Adding a Note

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



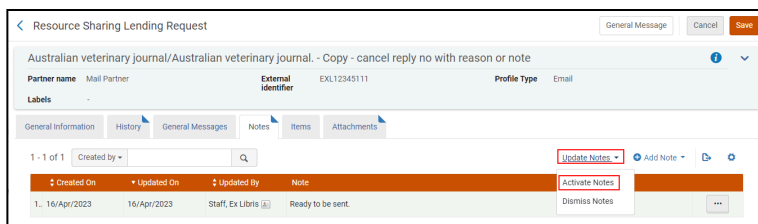
### Add Note

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.



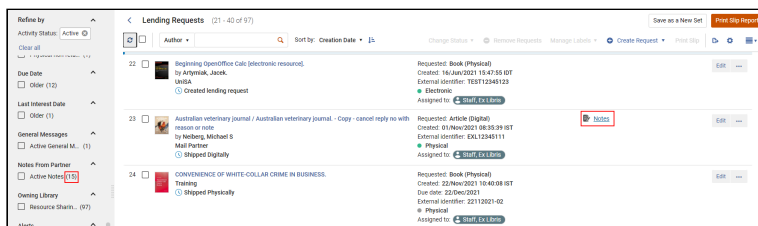
## Active Notes facet

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

# Unable to Supply Request

In cases where a lender is unable to fill a request, the request should be rejected rather than leaving the request unfilled or letting the request expire.

# Disabling Lending Hours

Resource sharing libraries can temporarily disable lending resource sharing accommodations. This feature is commonly used for holidays, extended staff absences, natural disasters, or known disruptions to services.

## Note

Lending hours must be disabled for both Rapido resource sharing and RapidILL. See [Disabling Lending Hours in Rapido](#).

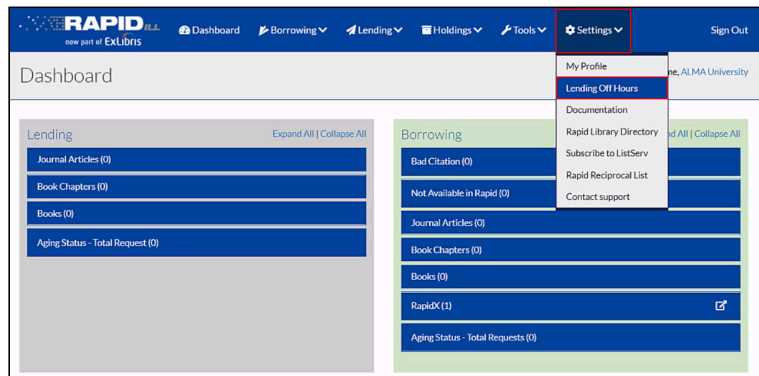
## Note

The Rapido configuration affects the physical requests and digital requests that do not come from RapidILL.

## Disabling Lending Hours in RapidILL

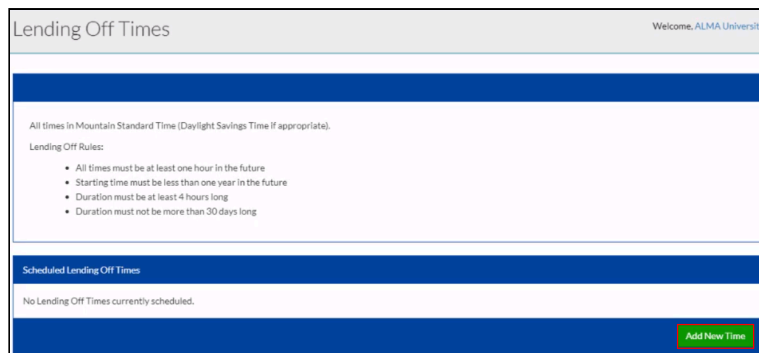
### To disable lending hours in RapidILL:

1. Log in to the RapidILL website.
2. Select **Settings > Lending Off Hours**.



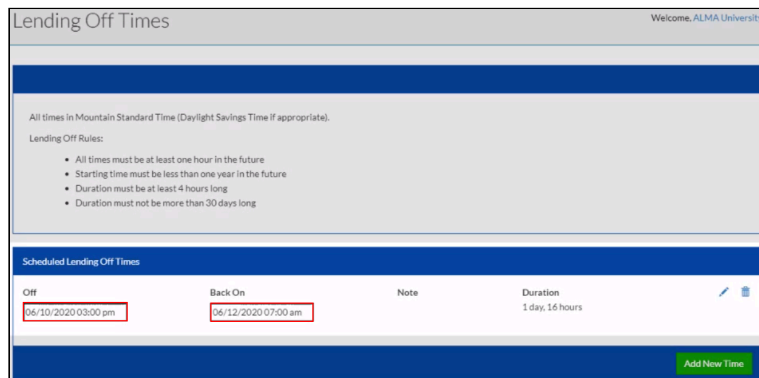
### Lending Off Times settings

3. Select **Add New Time**.



### Add New Times

4. Select the dates and times when lending is unavailable.



## Scheduled Lending Off Times

---

### Note

It is a known issue that if an off time is created and then edited, to change the off time, you must delete the off time and create a new entry.

---

## Document Delivery Rules for Automatic Emails

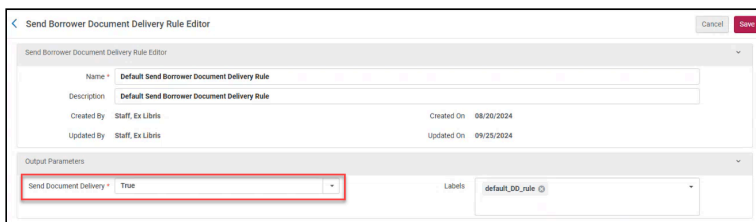
Libraries can choose to have digitally delivered requests automatically notify users once the requested material is made available by the lender's shipping action. Additionally, there are scenarios or preferences for libraries to enable borrowing staff to mediate the delivered documents prior to delivery to end users. Previously, this mediation was determined by the setting of the parameter **borrower\_document\_delivery\_send\_automatically** ([Configuration > Fulfillment > General > Other Settings](#)). The parameter setting is applied to all users. This functionality is controlled by document delivery rules ([Configuration > Resource Sharing > Rapido Rules > Send Borrower Document Delivery Rules](#)). The **Output Parameters** for the default document delivery rule is **True** by default. When set to **True**, documents are delivered automatically. When set to **False**, emails are not forwarded automatically, and this action must be manually performed by staff. With the document delivery rules, the available rules parameters are **Partner**, **User Group**, or **User Statistical Category**. Document delivery mediation rules can apply labels to the requests.

---

### Note

Parameter settings for **borrower\_document\_delivery\_send\_automatically** are automatically applied to the document delivery settings.

---



The screenshot shows the 'Send Borrower Document Delivery Rule Editor' interface. The 'Name' field is 'Default Send Borrower Document Delivery Rule' and the 'Description' is 'Default Send Borrower Document Delivery Rule'. The 'Created By' and 'Updated By' fields are both 'Staff, Ex Libris'. The 'Created On' date is '08/20/2024' and the 'Updated On' date is '09/25/2024'. The 'Output Parameters' section shows 'Send Document Delivery' set to 'True' (highlighted with a red box) and 'Labels' set to 'default\_dd\_rule'.

## Default Document Delivery Settings

---

### Note

This functionality does not apply to URLs sent from a lending request. When a lender fills a request using a URL link, the URL is either sent directly to the patron or directly to the library based on the institution's borrowing configurations.

---

When a request is stopped for mediation, the patron sees the request stopped at the **Shipped** point rather than at the **Sent** point.

### Patron timeline

## Reject Request Actions

When using the **Bad Citation** action, the request is sent back to the borrowing library, but the library does not receive information regarding the problem with the citation. These details need to be manually included in a note to the borrowing library. When using the **Reject** action, the reject reason is sent from the ISO message to the partner.

## Reject Request Reasons

Refer to the table for common reject reasons.

Common Reject Reasons

Rejection Message	Reason
At bindery	Title is owned but the requested item is at the bindery.
Charges	The responder's charges for the provision of the requested service.
Cost exceeds limit	Responder indicated that the minimum cost to supply the request is greater than the amount authorized.
Expiry not supported	Lender does not support processing requests for which an expiry date is specified.
In process	Item has been received but is not yet ready for use.
In use on loan	Requested item is currently in use by local patron or on loan to another borrower.
Lacking	The title is owned but not the component part of pages requested.
Lacks copyright compliance	Compliance with applicable copyright regulations or laws must be indicated before copying can be done.
Locations not found	No potential lender has been identified.
Lost	Requested item has been declared lost.
Mandatory messaging not supported	Lender does not provide/support ISO mandatory messaging.
Non circulating	Requested item is not available to loan.

Rejection Message	Reason
Not found as cited	Item cannot be located using item identification information provided in the ILL request.
Not on shelf	Requested item is available in lender's collection and is not currently charged out, but is currently unavailable.
Not owned	Requested item is not in lender's collection.
On hold	An outstanding hold is currently placed on the requested item by another borrower.
On order	Requested item is not currently available, but item is on order by lender.
On reserve	Requested item owned by lender, but is restricted to local use.
Other	Other reasons/conditions/requirements not supported by ISO standard responses.
Policy problem	Lender does not have policy in place to govern/support fulfillment of the ILL request.
Poor condition	Degraded physical condition of requested item prohibits interlibrary loan or reproduction.
Preferred delivery time not possible	Requested item cannot be delivered by deadline specified in ILL request.
Prepayment required	Prepayment is required prior to lending the item.
Requested delivery services not supported	Lender does not support delivery of items utilizing requested delivery service.
Volume issue not yet available	This volume or issue is not yet available for loan.

---

## Internal Reject Reasons

Lenders can select internal reject reasons from a customized list. When configured (see [Customizing Lending Reject Reasons](#)), when a lender rejects a request, the Reject Request screen includes an **Internal reject reason** dropdown list with the customized list.

---

### Note

The **Internal reject reason** is optional and only viewable by the lender.

---



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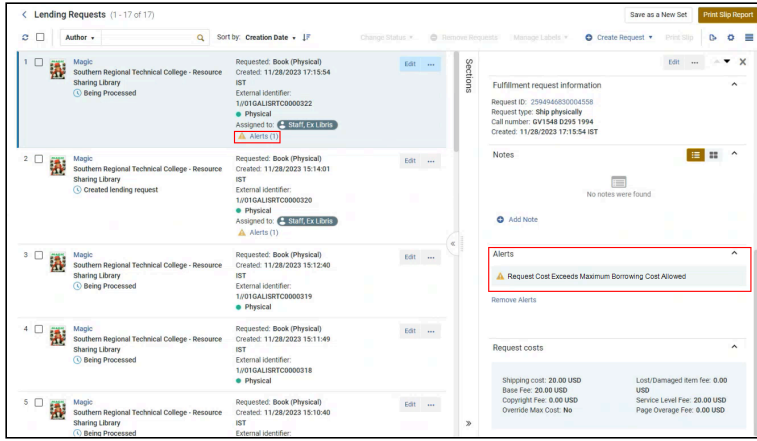
## Invoices and Request Costs

Lenders can apply fees to requests and generate invoices. When configured (see [Configuring Shipping Cost Lender Rules](#)), the Request Costs are displayed on the request right pane.

---

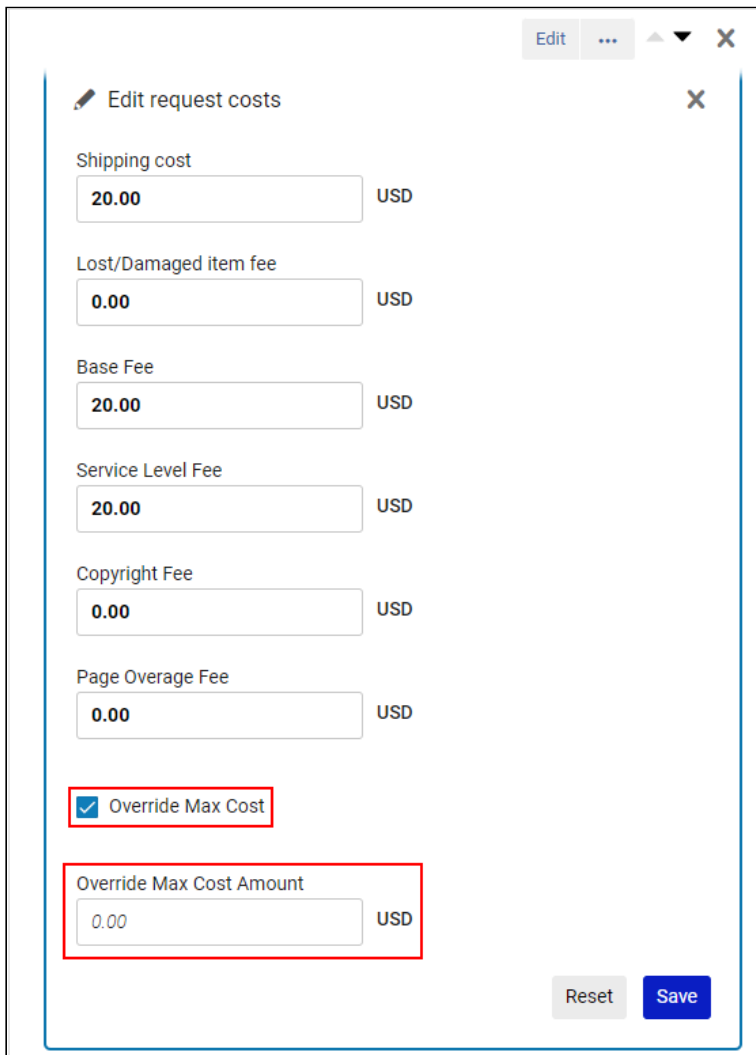
## Request Costs Alert

If a request is received that exceeds the maximum borrowing cost allowed, an alert is added to the request. See [Configuring Lending Alerts](#).



### Alert: Request Cost Exceeds Maximum Borrowing Cost Allowed

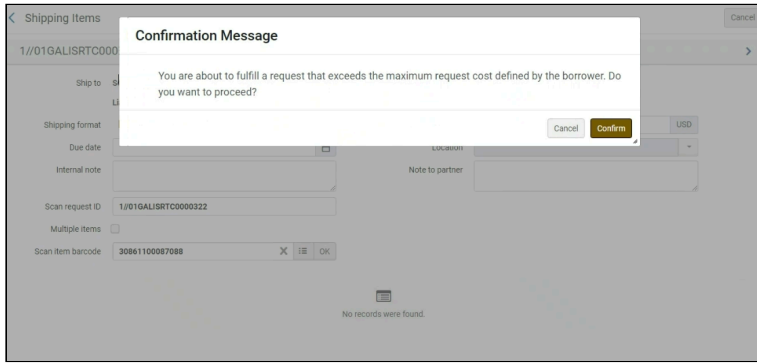
If the **REQUEST\_COST\_EXCEEDED** alert is manually removed (by selecting **Remove Alerts**), the **Override Max Cost** checkbox is automatically checked, and the **Override Max Cost Amount** is set to 0. A zero amount in the **Override Max Cost Amount** field indicates that there is no maximum cost.



### Override Max Cost

If the lender proceeds to ship the request, and the request exceeds the maximum request cost, a confirmation message is

displayed confirming that the request should still be filled. When selecting **Confirm**, the alert remains on the request.



**Confirmation Message to proceed with a request that exceeds the maximum request cost**

## 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.

Field	Value	Unit
Invoice Printed	<input type="checkbox"/>	
Invoice Sent Date	MM/dd/yyyy	
Invoice Number	Enter Text Here	
Invoice Paid	<input type="checkbox"/>	
Lost/Damaged Invoice Printed	<input type="checkbox"/>	
Lost/Damaged Invoice Sent Date	MM/dd/yyyy	
Lost/Damaged Invoice Number	Enter Text Here	
Lost/Damaged Invoice Paid	<input type="checkbox"/>	
Shipping cost	5.00	USD
Lost/Damaged item fee	5.00	USD
Base Fee	5.00	USD
Service Level Fee	5.00	USD
Copyright Fee	5.00	USD
Page Overage Fee	5.00	USD
VAT	5.00	USD
Total Cost	35.00	USD
Override Fees	<input type="checkbox"/>	
Override Max Cost	<input type="checkbox"/>	

**Vat and Total Cost**

## Overriding Calculated Fees

Fees can be applied automatically when the Shipping Cost - Lender Rules are configured (see [Configuring Shipping Cost Lender Rules](#)). The **Shipping cost**, **Base Fee**, **Service Level Fee**, and **Page Overage Fee** fields on the Request Costs in the right side pane and from the Resource Sharing Borrowing Request edit screen are automatically calculated based on the configured rules.

To enable lenders to override calculated fees, the Request Costs in the right side pane and the Resource Sharing Borrowing Request edit screen includes an **Override Fees** checkbox that enables library staff to override the **Shipping cost**, **Base Fee**, **Service Level Fee**, and **Page Overage Fee** and edit fees assigned by rules.

### Note

Pod terms are applied to requests filled by pods; therefore, the **Override Fees** checkbox is not applicable to requests filled by pods. The **Override Fees** option is available for requests that receive fees when the shipping cost rules are applied.

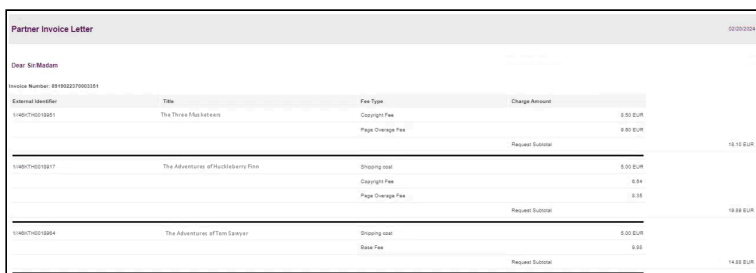
### Note

If the fees are overridden and the **Override Fees** checkbox is then unchecked, the Lending Requests list must be refreshed before the Request Costs revert back to the automatically calculated based on the configured rules.

## Creating Invoices for Partners

When configured (see [Send Invoice to Partner Job](#)), lending institutions can send invoices directly to borrowers for requests that include fees.

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

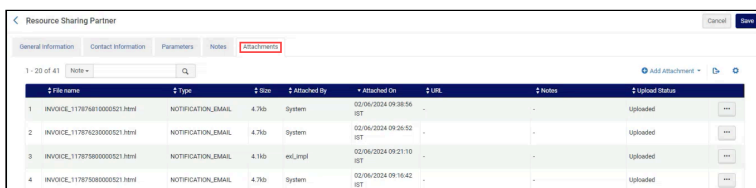


The screenshot shows a 'Partner Invoice Letter' for 'Dear Sir/Madam'. It contains a table with the following data:

External Identifier	Title	Fee Type	Charge Amount
1146170018251	The Three Musketeers	Copyright Fee	0.50 EUR
		Page Overage Fee	0.90 EUR
		Request Subtotal	10.10 EUR
1146170018217	The Adventures of Huckleberry Finn	Shipping cost	0.50 EUR
		Copyright Fee	0.84
		Page Overage Fee	0.58
		Request Subtotal	10.88 EUR
1146170018254	The Adventures of Tom Sawyer	Shipping cost	0.50 EUR
		Base Fee	0.88
		Request Subtotal	14.88 EUR

### Partner Invoice Letter

Invoices are also viewable on the new Resource Sharing Partner **Attachments** tab ([Fulfillment > Resource Sharing > Partners](#)). Attachments can also be added manually.



The screenshot shows the 'Resource Sharing Partner' page with the 'Attachments' tab selected. It displays a table with the following data:

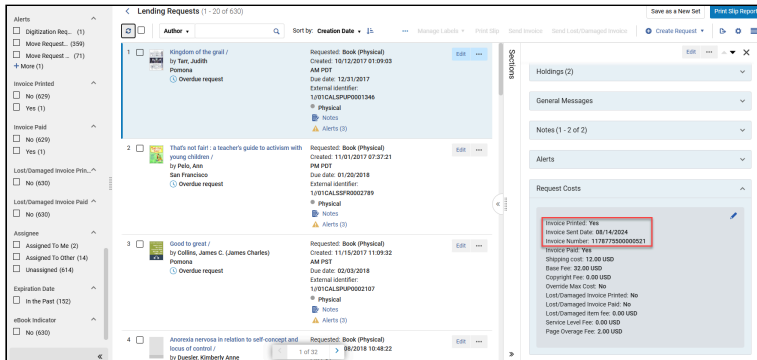
ID	File name	Type	Size	Attached By	Attached On	URL	Notes	Upload Status
1	INVOICE_117878810000521.html	NOTIFICATION_EMAIL	4.7kb	System	02/06/2024 09:26:56 BST	-	-	Uploaded
2	INVOICE_117878230000521.html	NOTIFICATION_EMAIL	4.7kb	System	02/06/2024 09:26:52 BST	-	-	Uploaded
3	INVOICE_117878890000521.html	NOTIFICATION_EMAIL	4.1kb	ext_impd	02/06/2024 09:21:10 BST	-	-	Uploaded
4	INVOICE_117875080000521.html	NOTIFICATION_EMAIL	4.7kb	System	02/06/2024 09:16:42 BST	-	-	Uploaded

### Attachments tab

The invoice status is displayed in the right pane **Request Costs** in the following fields:

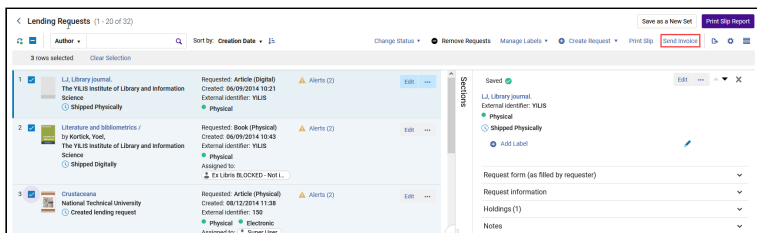
- Invoice Sent Date — The date the invoice was sent to the partner.
- Invoice Number — The invoice number that contains this request charge information.
- Invoice Printed — An indication if an invoice was already created for this request.

When the section is open for editing, the library staff can update the invoice number and the invoice printed indicator.



### Request costs

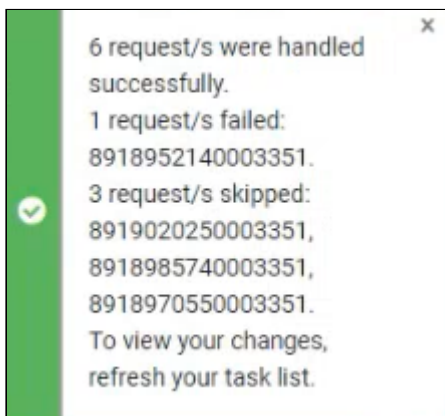
Invoices can also be sent in bulk by selecting multiple requests and selecting the Lending Request **Send Invoice** action.



### Send Invoices in bulk action

A message is displayed indicating which invoices were sent.

Successful invoices are invoices that were sent successfully. Failed invoices are invoices to partners without an email address. Skipped invoices are for requests that are not relevant because there are no charges for those requests or an invoice was already sent.



### Confirmation message

After an invoice is paid, the invoice can be marked as paid using the Request costs editor, and requests can be faceted by whether or not an invoice was paid.



## Invoice Paid

## Digital Delivery

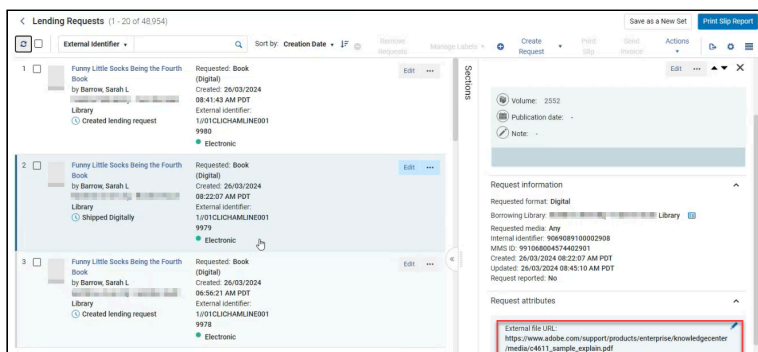
Lending requests are fulfilled from electronic or physical collections. Requests with requested format type `digital` and inventory type `digital` are fulfilled from electronic collections. Requests with inventory type `physical` and requested format type `digital` are fulfilled from physical collections. To deliver from physical collections, libraries use a pull slip. The letters can be customized to include information required by your library. For more information, see [Rapido Letters](#).

## Filling Requests with URLs

When a lender fills a request using a URL link, the URL is either sent directly to the patron or directly to the library based on the institution's borrowing configurations.

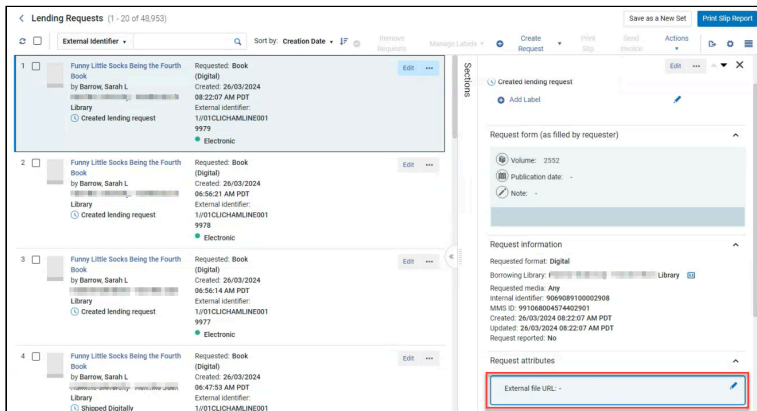
ISO partners can fill digital requests with URLs.

When a lender receives a request for an ebook that the lender has defined as fit for ebook lending (according to participating ebooks and the pod), the request can be filled by manually adding an **External file URL**, or by using the **Ship item digitally** action and adding the URL.



## Populated External file URL

When no **External file URL** is available, the attribute is blank.



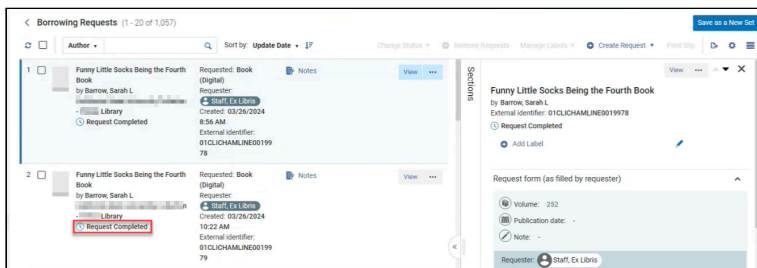
### Blank External file URL

When the lender adds an **External file URL**, the **External file URL** is populated on the Borrowing **Request attributes**, the Document Delivery Notification Letter is sent to the patron, and the borrowing request updates to **Request Completed**.

### Note

For file size restrictions, see [Lending Scanning Options](#).

Once the file is sent, the request updates to **Request Completed**.



### Request Completed

## Digital Delivery Download

Rapido users can share PDFs and eBook chapters from a lending request without needing to print any pull slips. Requests with a **Digital** format and inventory type **Electronic** are held electronically and can be downloaded and delivered.

### To deliver the request:

1. Select the action **Download Electronic Resource**. The Download Electronic Resource screen is displayed.

**Download Electronic Resource**

**FLOWER & GARDEN HARDINESS ZONE MAP / Flower and garden**  
 ISSN : 0891-9534  
 Volume : 45  
 Issue : 4  
 Publication Year : 2001  
 External Identifier : 03122023-1

<p>1 Gale Cengage General Reference Center International          Available from 1983 until 2002.          Internal Description: local_only</p>	<p><b>License Terms:</b>          Interlibrary loan electronic: <b>Permitted</b>          Interlibrary loan record keeping required indicator: <b>Yes</b>          Interlibrary loan print or fax: <b>Not Applicable</b>          Interlibrary loan secure electronic transmission: <b>Permitted</b></p>
<p>2 Gale OneFile: Home Improvement          Available from 01/01/1984 until 07/31/2002.</p>	<p><b>License Terms:</b>          Interlibrary loan electronic: <b>Permitted</b>          Interlibrary loan record keeping required indicator: <b>Yes</b>          Interlibrary loan print or fax: <b>Not Applicable</b>          Interlibrary loan secure electronic transmission: <b>Permitted</b></p>
<p>3 Gale OneFile: Vocations and Careers          Available from 01/01/1984 until 07/31/2002.          Internal Description: lendable_international</p>	<p><b>License Terms:</b>          Interlibrary loan electronic: <b>Permitted</b>          Interlibrary loan record keeping required indicator: <b>Yes</b>          Interlibrary loan print or fax: <b>Not Applicable</b>          Interlibrary loan secure electronic transmission: <b>Permitted</b></p>

**Ship item digitally**

Shipping Terms Of Use:  
 Please choose an option ▾

Complete the request

Drop a file or [browse](#)

2. Search for the article or book chapter and download it.
3. Select **Browse** to browse for the article or book chapter, or drop the file in the **Ship item digitally** section.
4. Select **Send** to send the file to the borrowing library through RapidILL.

## Automating Digital Requests

Rapido supports batch automatic delivery of digital lending requests from a configured folder using the internal identifier from scanned files. When the **Automatically Ship Rapido Digital Requests** job runs, the attached files are sent automatically to fill the borrowing request, and the request closes automatically.

For information on configuring the **Automatically Ship Rapido Digital Requests** job, see [Configuring Rapido Jobs](#).

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

When the file is available, the borrower receives the Notification Item Letter with links to the file.

### Note

The out-of-the-box Notification Item Letter automatically includes the link. If a user has configured the letter, the user needs to configure these links for them to be included.

**Notification Item Letter** 22/Nov/2022

Staff, ex libris Resource Sharing Library address

Your request to create a digital version of the following material has been completed.

Title: Film & history

To download the resource:  
 For local/DAP users [click here](#).  
 For SAML users (add upcode if needed) [click here](#).  
 For CAS users [click here](#).

### Links to files in the Notification Item Letter

The request then updates the request **Status** to *Shipped Digitally*. If there is a problem that causes the file delivery to fail, the job will try to send the file the next time the job is run.

The job report for the **Automatically Ship Rapido Digital Requests** job is available in the **History** tab ([Admin > Manage](#)

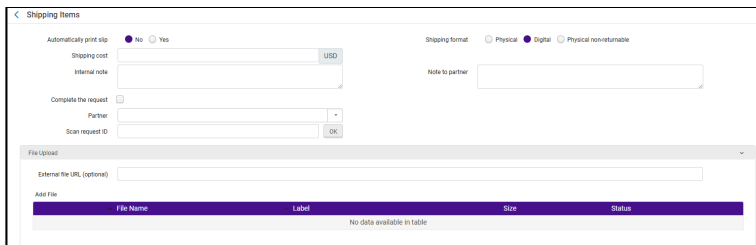
## Jobs and Sets > Monitor Jobs).



### Alerts and Events on the Job Report

## Digital Delivery — Ship from Fulfillment

Digital requests can be filled from **Fulfillment > Resource Sharing > Shipping Items**, and selecting **Digital**. Enter a URL in the **External file URL** field or select **Add File** to upload the file.

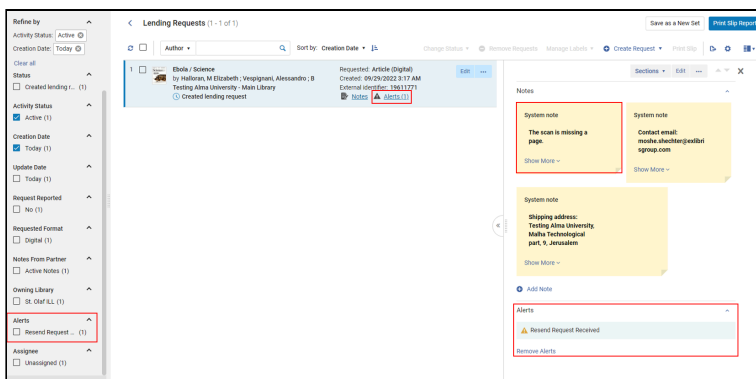


### Shipping Items

## Resupplying a Request

When **RESEND\_REQUEST\_RECEIVED** (**Configuration > Resource Sharing > Configuration > Manage Lending Alerts**) is configured, Rapido includes alerts to notify lenders when the borrowing institution uses the **Resupply Request** action.

The lender receives an alert and a note with the request, and the request status updates to **Created lending request**.



### Lending Request Notes and Alerts

#### Note

Resend Requests can also be saved as sets.

---

## eBooks

The lender can fulfill the request using the **Download Electronic Resource** or **Ship item digitally** actions. Once shipped, messages that the request was sent successfully are displayed and the request status changes to Shipped Digitally on both the lending and borrowing requests.

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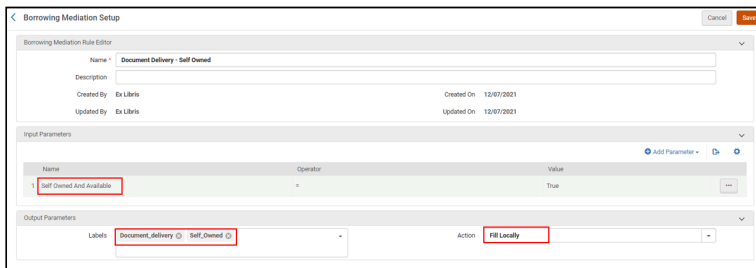
## Digital Delivery for Owned Resources

You can fulfill digitization requests for resources you own.

### To fulfill digitization requests for resources you own:

- Create a mediation rule (**Resource Sharing > Rapido Rules > Borrowing Mediation Rules**) using the parameter **Self Owned And Available**.

When an item is both self-owned and available, the **Action** `Fill Locally` is automatically executed, and a borrowing request and lending request are created under your resource sharing library. The lending request displays your library as the partner and is listed in the lending requests task list to be fulfilled. All relevant functionality available for lending requests apply, such as automatic move to branch/digitization. Once the resource is shipped digitally, both the borrowing and lending requests are completed. The user receives an email with the link to the resource, which is also available under their patron card.



The screenshot shows the 'Borrowing Mediation Setup' window. The 'Name' field is 'Document Delivery - Self Owned'. The 'Description' field is empty. The 'Created By' and 'Updated By' fields are 'Ex Libris'. The 'Created On' and 'Updated On' fields are '12/07/2021'. The 'Input Parameters' section shows a table with one row: 'Self Owned And Available' with an equals sign operator and a 'True' value. The 'Output Parameters' section shows 'Labels' as 'Document\_Delivery () Self\_Owned ()' and 'Action' as 'Fill Locally'.

### Self Owned And Available mediation rule

For information on manually fulfilling a digitization request that you own, see [Fill locally](#).

Watch [Document Delivery for Materials Owned by Your Library](#).

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### Note

For sites with one resource sharing library, both the borrowing and lending requests are created under the same library. For institutions with more than one resource sharing member, the lending request is created under the resource sharing library associated with the library that owns the material.

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## Shipping Items Digitally

Rapido enables you to ship a digital request directly from the **Download Electronic Resource** screen. After downloading a digital request (**Lending Request > Download Electronic Resource** action), you can now use the **Ship item digitally** action to upload the electronic resource directly from the **Download Electronic Resource** screen.

**Download Electronic Resource**

**4 Trends In Food & Beverage Formulation / Food manufacturing**  
 ISSN : 1558-576X  
 OCLC : 49780442  
 Issue : 1  
 Publication Year : 2018  
 External Identifier : 20207816

1 ABU/INFORM Collection  
 Available from 03/01/2002 until 06/30/2006.  
 Internal Description: 2012/04/23: turned on target for Default. CEM

**Ship item digitally**

Drop a file or browse

Cancel Ship

### Ship item digitally

Browse to or drop the file to upload and select **Ship**.

**Download Electronic Resource**

**4 Trends In Food & Beverage Formulation / Food manufacturing**  
 ISSN : 1558-576X  
 OCLC : 49780442  
 Issue : 1  
 Publication Year : 2018  
 External Identifier : 20207816

1 ABU/INFORM Collection  
 Available from 03/01/2002 until 06/30/2006.  
 Internal Description: 2012/04/23: turned on target for Default. CEM

**Ship item digitally**

Drop a file or browse

File name	File size
1 file_example_CSV_5000.csv	277 KB

Cancel Ship

### Uploaded digital item ready to ship

The status updates to **Shipped Digitally** and the borrower receives the **Notification Item Letter** with the resource attached or a link to download the resource.

Lenders that provide a document delivery service can indicate whether the supplied document can be made available to the patron in digital form, or whether the digital content requires manual handling by the borrowing staff, such as printing a physical copy that can be shared with the patron as a non-returnable physical copy. This option enhances copyright control by enabling the lender to specify to the borrower that the document cannot be shared with the patron. To enable relevant terms see, [Conditional Terms of Use for Digital Requests](#).

Document Delivery

Webinars

Request ID: 21795654

Files

Shipping Terms of Use

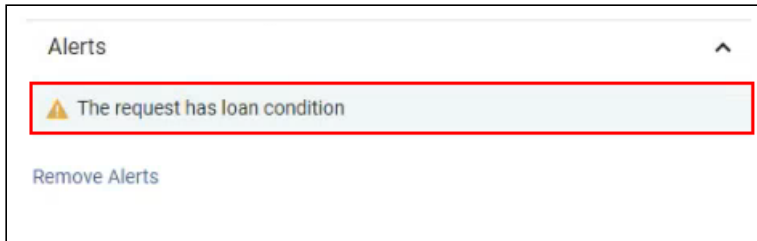
External File URL (optional)

Drop files here, or browse.

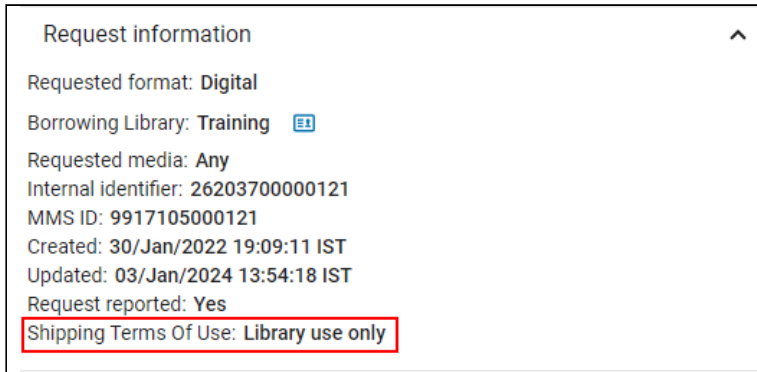
Cancel Ship

### Shipping Terms of Use

When a term of use is selected, an alert is added to the request indicating that **The request has a loan condition**, and the **Shipping Terms Of Use** condition appears on the right pane **Request information**.



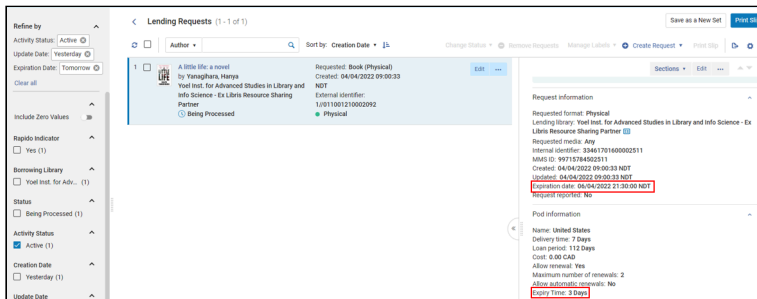
### Loan condition alert



### Request information Shipping Terms Of Use

## Expired Lending Requests

When a pod is configured with expiration terms, lending requests include an expiration date and the number of days before a request is due to expire.



### Pod/Request information with expiration details

Requests can be faceted by **Expiration Date**.

**Expiration Date** ^

In the Past (0)

Today (0)

Tomorrow (1)

2-3 days from now (0)

4-7 days from now (0)

More than 8 days... (0)

[- Less](#)

#### Expiration Date facet

For pods that allow automatic renewals, when the **Send Courtesy Notices and Handle Loan Renewals Job** ([Configuration > Fulfillment > General > Fulfillment Job Configuration](#)) is set to *Active* and **Allow Renew for Rapid Pods Requests** is checked, expiring requests are automatically renewed.

#### Note

To prevent lending requests from expiring during non-workdays, set the days to exclude from the expiry period calculation ([Configuration > Resource Sharing > Configuration > Resource Sharing Working Days](#)).

## Lending Physical Items

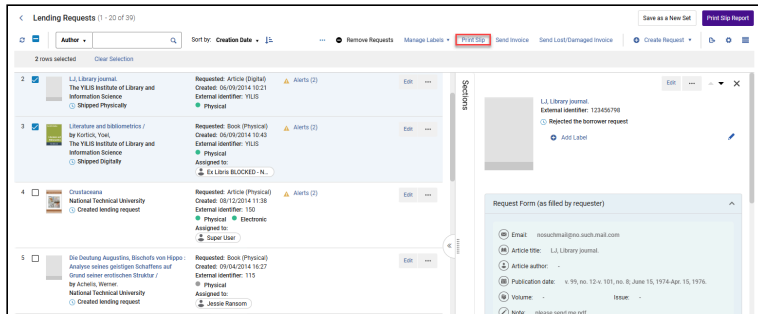
If the lending request is for a resource that your library owns in physical form, you can either fill the request by sending the physical item to the requesting institution or digitize the resource and send the digitized version to the requesting institution. You can either send a digitization request to a digitization department in your institution or digitize the resource yourself (see [Digital Delivery](#)). Physical requests that require shipping have a status of **Being processed** or **Created lending request**.

## Printing Slips in Bulk

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.

#### Note

When selecting one or more requests and choosing the bulk Print Slip action, the task list does not refresh, and the facets do not change.



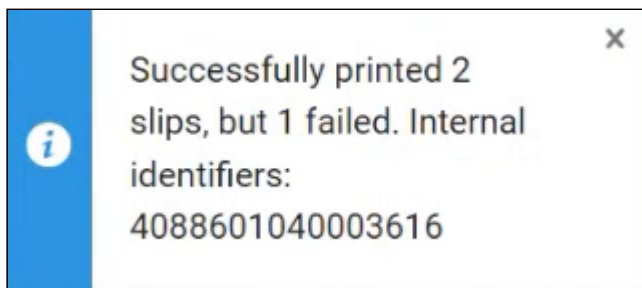
## Print Slip

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

## Generating a Print Slip Report

To lend items to other libraries, the items must be pulled from the library shelves.

You can generate a print slip report that is sent to a printer or an email address, or can be downloaded to a local machine. The report contains the selected items and their information, including Title, Author, Location, and so forth. The letter format for this report is the Lending Requests Report Slip Letter.

For more information about the print slip report for lending requests, see the [Print Slip Report for Lending Requests](#) video (2:35 mins).

### To generate a print slip report for a resource sharing lending request:

1. From the Lending Request page, select the checkboxes of the resources for which you want to generate a print slip report.
2. Select **Print Slip Report**. The Print Slip Report is displayed.

**Print Slip Report**

Choose Type:  Printer  User

Format Type:  XML  Excel

User: ▼ \*Select a value

Download Cancel Send

### Print Slip Report

3. In the **Choose Type** field, select whether you want to send the print slip report to a **Printer** or a **User**.

If you select **Printer**, the **Printer** field replaces the **User** field and is enabled. Select the printer to which you want to send the print slip report.

If you select **User**, the **User** field is enabled. Select the user to whom you want to email the print slip report. The letter format for this report is the Lending Requests Report Slip Letter.

4. In the **Format Type** field, choose to send the print slip report either in **Excel** or **XML** format.
5. Select **Send** to send the print slip report, or optionally, select **Download** to download the print slip report to your local machine.

---

## Shipping from Fulfillment

After items have been pulled, scan the item's barcode from **Fulfillment > Resource Sharing > Shipping Items**. Select whether to **Automatically print slip** and enter any other relevant details. The item's status updates to **Shipped**.

Shipping Items

Automatically print slip  No  Yes

Shipping cost  USD

Location

Internal note

Scan request ID

Multiple items

Scan item barcode  Look-up or select

Shipping format  Physical  Digital  Physical non-returnable

Due date

Note to partner

### Shipping Items

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## Shipping from a Request

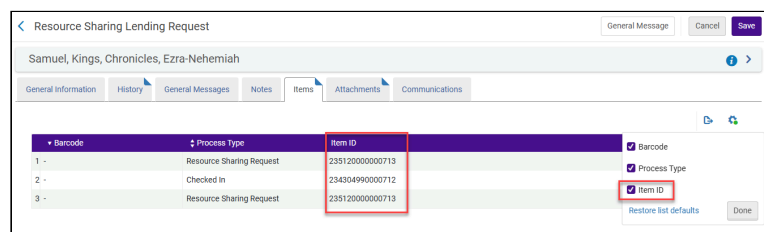
Items can be shipped directly from the Lending Requests task list.

### To ship an item from the task list:

1. Select the action list (...) from the request and select **Ship item physically**. The Shipping Items window is displayed.
2. Scan the item's barcode.
3. Select whether to **Automatically print slip** and enter any other relevant details. The item's status updates to **Shipped**.

## Shipping Items Without a Barcode

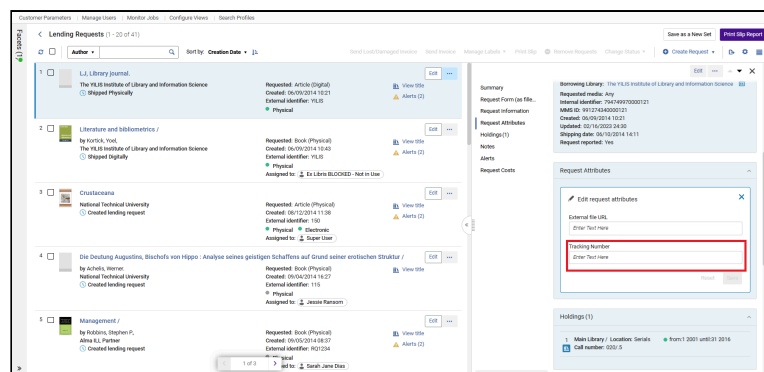
Rapido automatically uses the **Item ID** when shipping items without barcodes. If an item does not include a barcode, the **Barcode** column on the **Items** tab is empty, and the item ID is listed in the Item ID column. This is also applicable for **Multiple Item** options and the **Scan In** interface.



### Item ID

## 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

## Scan In Message

If a request is accidentally scanned in twice, the request status updates to Completed instead of Shipped physically. Enable the pop-up message to allow staff to choose whether or not the request is completed on the second scan in. For more information, see [Configuring Scan In Messages](#).

## Managing Returning Physical Resources

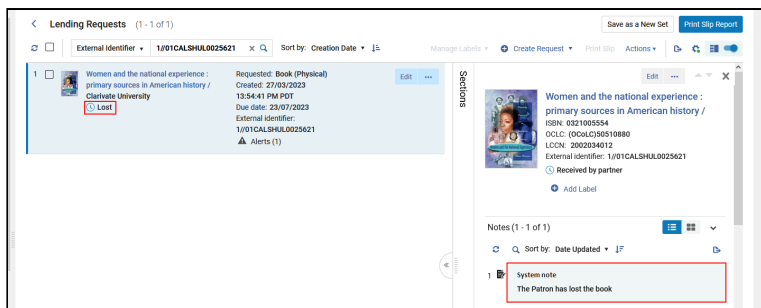
After receiving a returned item, the item must be scanned to mark it as returned.

### To scan a returned item:

- From **Fulfillment > Checkout/Checkin > Return Items**, scan the item's barcode to return the item. The item can now be returned to the shelf.

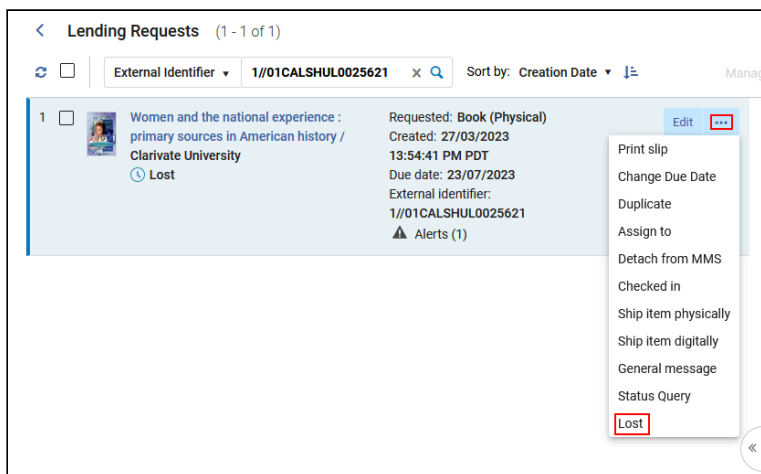
## Adding a Lost Item Fee

When a borrower declares an item as lost, a note is added to the lending request, and the request status updates to **Lost**.

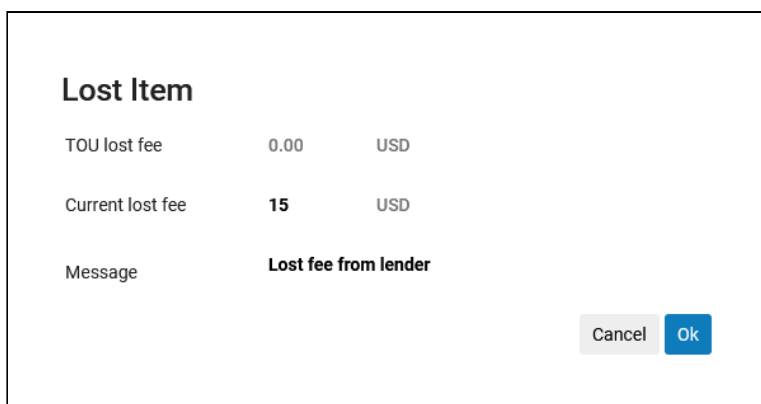


### Note added to the Lending Request

The lender can then apply the **Lost** action to the item and send a message to the borrower about the **Lost Item** fee.



### Lost lending action

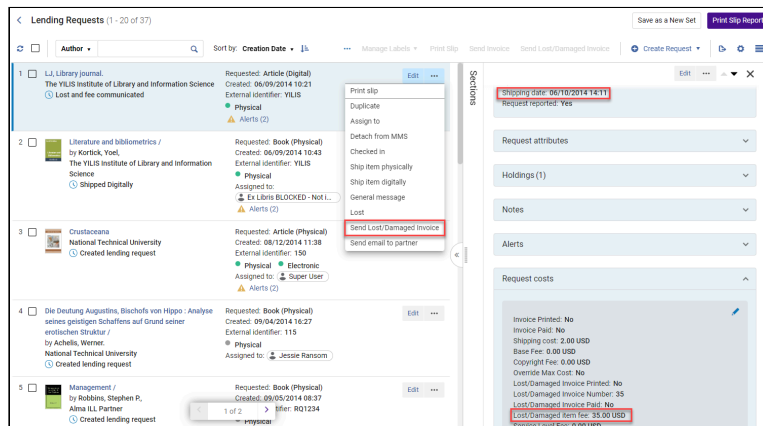


### Lost Item message

After sending the Lost Item message, the request status updates to **Lost and Fee Communicated**. After the fee is paid or waived, manually set the lending status to **Request Completed**.

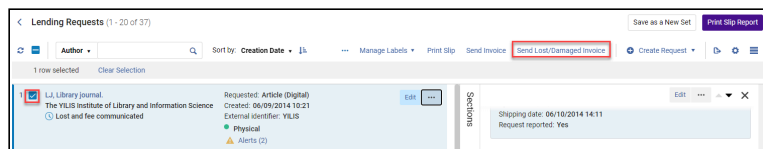
## Sending Lost/Damaged Invoices

This feature enables lending institutions to send invoices directly to borrowers for lost or damaged items. When the request includes a **Shipping date**, and the **Lost/Damaged item fee** is populated in the right pane of a request, and the **Lost/Damage Invoice Printed** value is **No**, the **Send Invoice Lost/Damaged Invoice** action is available.



### Send Invoice Lost/Damaged Invoice action

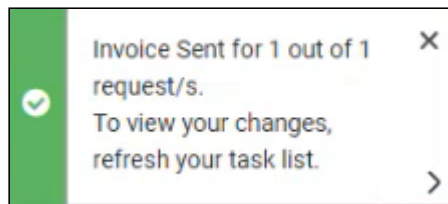
Lost/damaged invoices can also be sent in bulk by selecting multiple requests and selecting the Lending Request **Send Lost/Damaged Invoice** action.



### Send Lost/Damaged Invoices in bulk action

A message is displayed indicating which invoices were sent.

Successful invoices are invoices that were sent successfully. Failed invoices are invoices to partners without a Shipping date or if the Lost/Damaged Invoice Letter is disabled. Skipped invoices are for requests that are not relevant because there are no charges for those requests since the **Lost/Damaged item fee** field is null, or an invoice was already sent (**Lost/Damaged Invoice Printed** value is **Yes**).



### Confirmation message

Requests can also be faceted by **Lost/Damaged Invoice Printed** and **Lost/Damaged Invoice Paid**.

Lost/Damaged Invoice Printed ^

No (74)

Yes (1)

Lost/Damaged Invoice Paid ^

No (75)

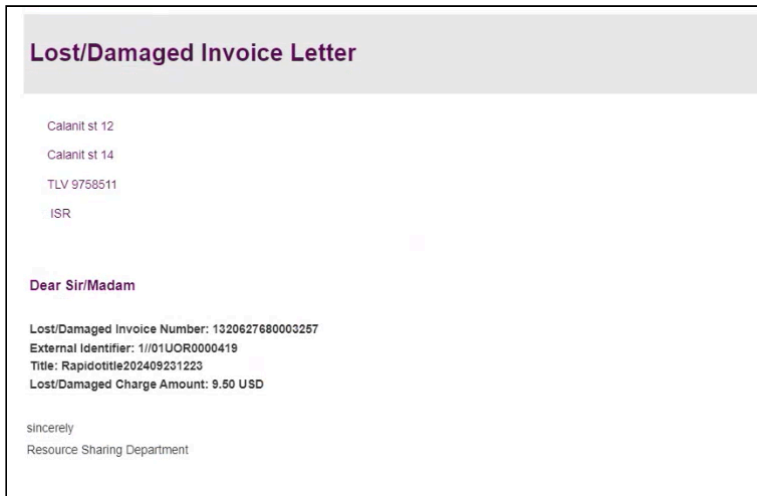
### Lost/Damaged Invoice facets

When the Partners Lost/Damaged Invoice Letter is **enabled**, selecting the **Send Invoice Lost/Damaged Invoice** action emails the letter to relevant partners.

### Note

If a **Payment address** email is configured for the partner, the letter is emailed to the **Payment address**. If a **Payment address** email is not configured, and the **Preferred address** is configured for the partner, the letter is emailed to the **Preferred address**.

The letter contains the invoice number, request identifier, and the lost/damaged charge for the request. For more information, see [Configuring Rapido Letters](#).



### Lost/Damaged Invoice Letter

Invoices are also viewable on the Resource Sharing Partner **Attachments** tab ([Fulfillment > Resource Sharing > Partners](#)).

File name	Type	Size	Attached By	Attached On	URL	Notes	Upload Status
INVOICE_117876810000521.html	NOTIFICATION_EMAIL	4.7kb	System	02/06/2024 09:28:56 IST	-	-	Uploaded
INVOICE_117876230000521.html	NOTIFICATION_EMAIL	4.7kb	System	02/06/2024 09:28:52 IST	-	-	Uploaded
INVOICE_117875800000521.html	NOTIFICATION_EMAIL	4.1kb	ext_impf	02/06/2024 09:21:10 IST	-	-	Uploaded
INVOICE_117876300000521.html	NOTIFICATION_EMAIL	4.7kb	System	02/06/2024 09:18:42 IST	-	-	Uploaded

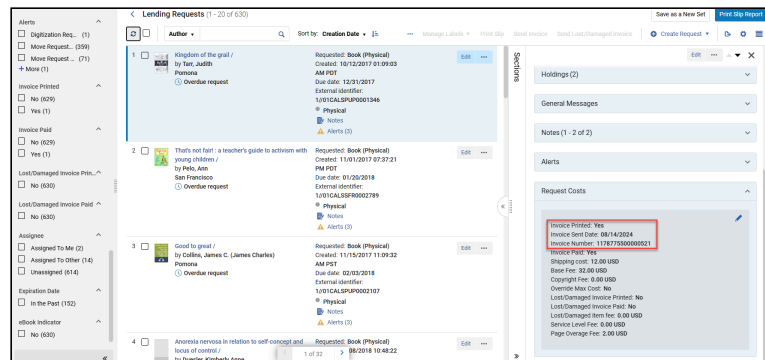
### Attachments tab

The invoice information is displayed in the right pane **Request costs**.

The **Lost/Damaged Invoice Printed** field represents if the Partners Lost/Damaged Letter was sent, values Yes or No.

The **Lost/Damaged Invoice Sent Date** field is the date the letter is sent.

The **Lost/Damage Invoice Number** is the invoice number for the library's reference. This field is auto-populated by Rapido and is editable.



## Request costs

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## Lending Scanning Options

You can set a message to warn users that scanning in items completes the lending process. See [Configuring Lending Scanning Options](#).

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### Note

The file size limit for attachments is 25 MB and 1000 MB for URLs.

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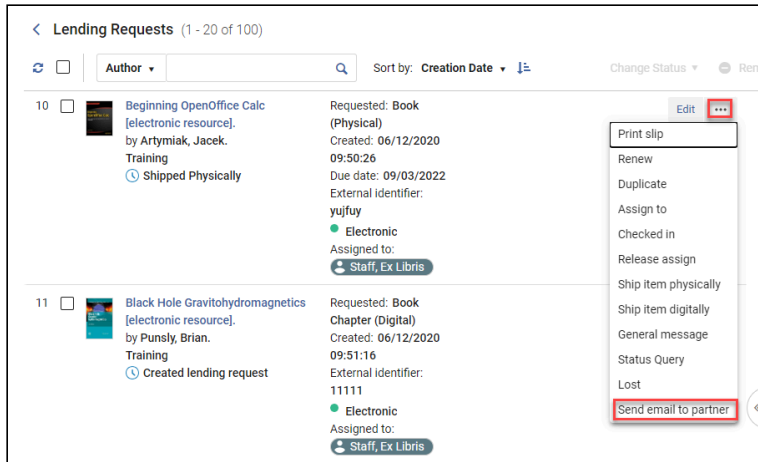
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## Partner Types

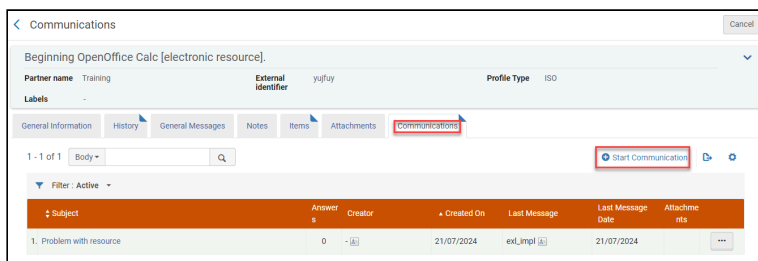
### Communicating with Partners

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

Correspondence can be initiated using the **Send email to partner** action or from the **Start Communication** button on the **Communications** tab.



## 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 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 \*** yoel\_ill\_desk@yoelinst.edu

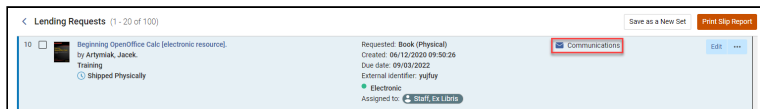
**To \*** *Enter Text Here*

**Subject \*** *Enter Text Here*

**Body**  
**Title: Beginning OpenOffice Calc [electronic resource].**  
**by: Artymiak, Jacek.**  
**ISBN: 1-4302-3159-9**  
**OCLC: 773477105**

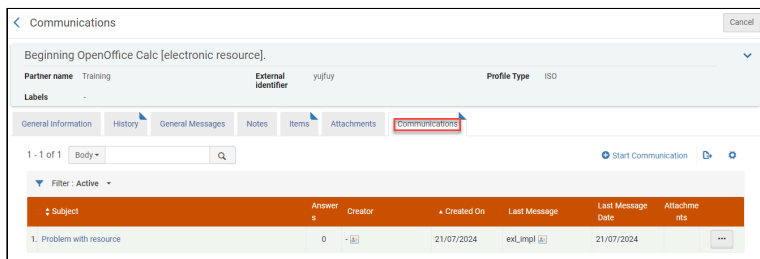
## Send email to partner form

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



## Communications indicator

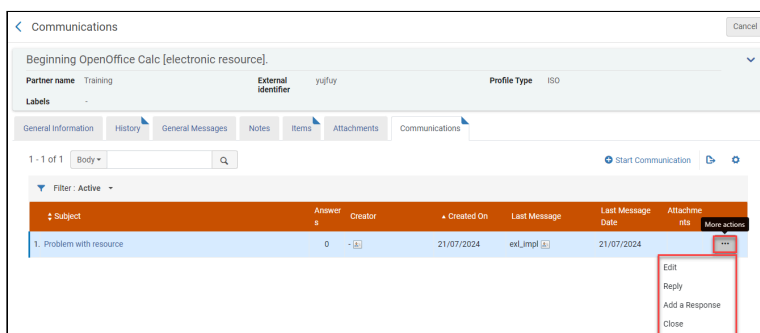
The correspondence log is accessible from the **Communications** tab.



## Communications tab

You can:

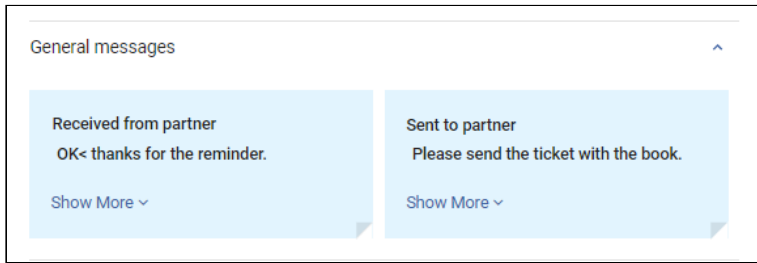
- **Edit** a correspondence to view the full correspondence.
- **Reply** to a communication to send another correspondence. Each reply increases the counter in the **Communications Answers** column.
- **Add a Response** to paste the partner's response to your correspondence.
- **Close** the correspondence. 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

## Sending a General Message

You can send a general message from a lending request using the General message action. The message is displayed on the right-side panel in the **General messages** section, as well as in its **General Messages** tab when you select **Edit** or **View** to open the full form of the request.



### General messages

General Messages can be sent only if:

- The borrowing request is an ISO, email or NCIP-P2P request.
- The borrowing request has already been sent

Additionally, there is a **General Messages** facet, which enables you to filter requests by those containing active general messages.

### To send a general message:

1. From the Lending Requests task list, select a request.
2. From the request actions menu (...), select **General message**. The **General Message** form is displayed.

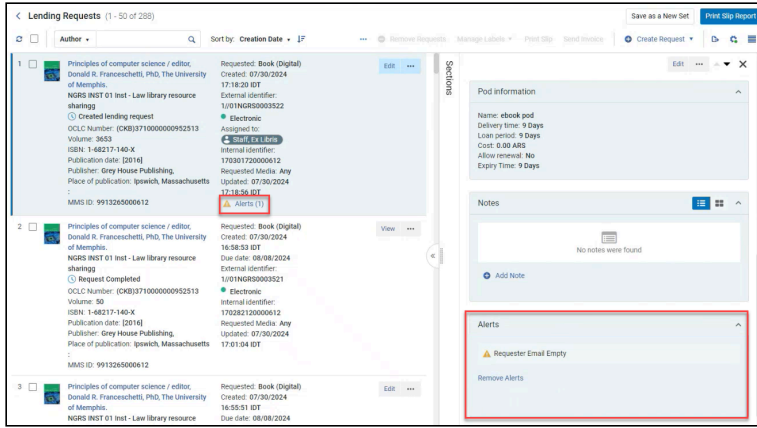
### General Message

3. In the **Message** field, enter a message
4. Select **Send**. The message is sent to the borrower. The request is limited to 1,000 characters.

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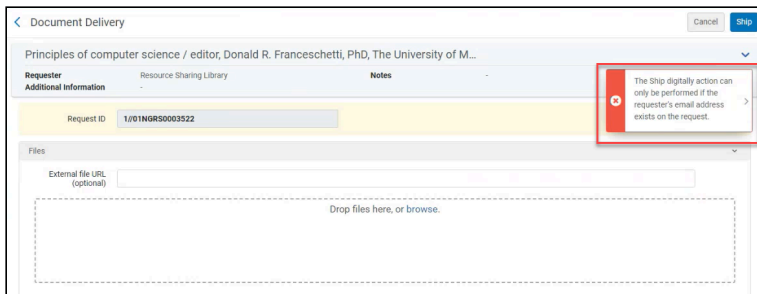
## Digital Requests for ISO Partners Without Email Address Alert

When a lender ships a digital request for borrower who is an ISO partner, and the borrower email address is not supplied, when **[ISO]REQUESTER\_EMAIL\_EMPTY** ([Configuration > Resource Sharing > Configuration > Manage Lending Alerts](#)) is enabled (default), an alert is now added to the lending request indicating that the borrower does not have an email address.



## Requester Email Empty alert

Additionally, regardless of the configuration, when a digital request is shipped without an email address, an error is generated informing the lender that the request can only be fulfilled if the requester has an email address.



## Error for a digital request

# Lending to Self Registered Partners

Lenders can allow borrowers who are not resource sharing partners to self register for resource sharing services. See [Enabling Self Registration for Partners](#).

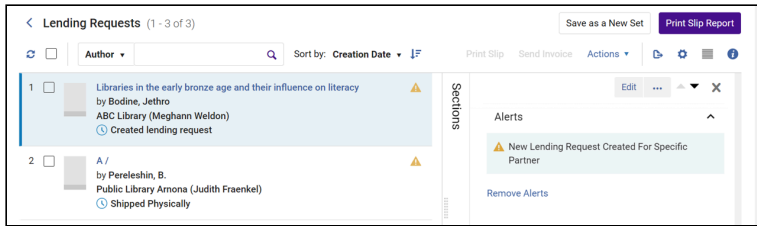
Self registered partners are created as email partners. Lending requests can be processed through regular workflows. Instead of the automated ISO messages that are sent to pod partners, the partner receives automated email communications. See the [Resource Sharing Email Workflow Letters](#).

Requests received by self registered partners include the **New Lending Request Created For Specific Partner** alert by default.

## To disable alerts for specific partners:

1. From **Fulfillment > Resource Sharing > Partners**, select a partner.
2. From the **General Information** tab, uncheck **New Request Alert**. The **New Lending Request Created For Specific Partner** alert is disabled.

The alert is available as a facet for filtering and saving as sets. For dismissing alerts, see [Managing Lending Alerts](#) and [Configuring Lending Alerts](#). The alert is enabled by default for partners created through the self registration process.



## New Lending Request Created For Specific Partner alert

## Email Partners

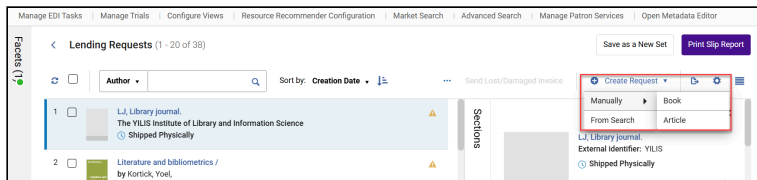
Partners created as email partners send and receive communication through email messages rather than automatic ISO messages. See [Rapido Letters](#) for messages that can be triggered to send to email partners. See [Communicating with Partners](#) section on how to add communication received by email to the communications tab of a request.

## Manually Creating Requests

If a partner communicates outside of Rapido, requests can be created manually to track and maintain the request.

### To manually create a request:

1. From the Lending Requests task list, select **Create Request > Manually**, and then select **Book** or **Article**.



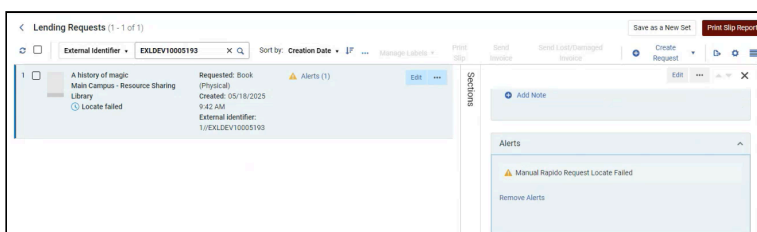
2. Enter the relevant Resource Information, Request Attributes, and if relevant, Request Costs.
3. **Save** the request. The request is added to the Lending Requests.

Associating the request with an email partner type and enabling email partner letters enables Rapido to send these emails to the partner.

## 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.

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**.



**Manual locate failed alert**

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.