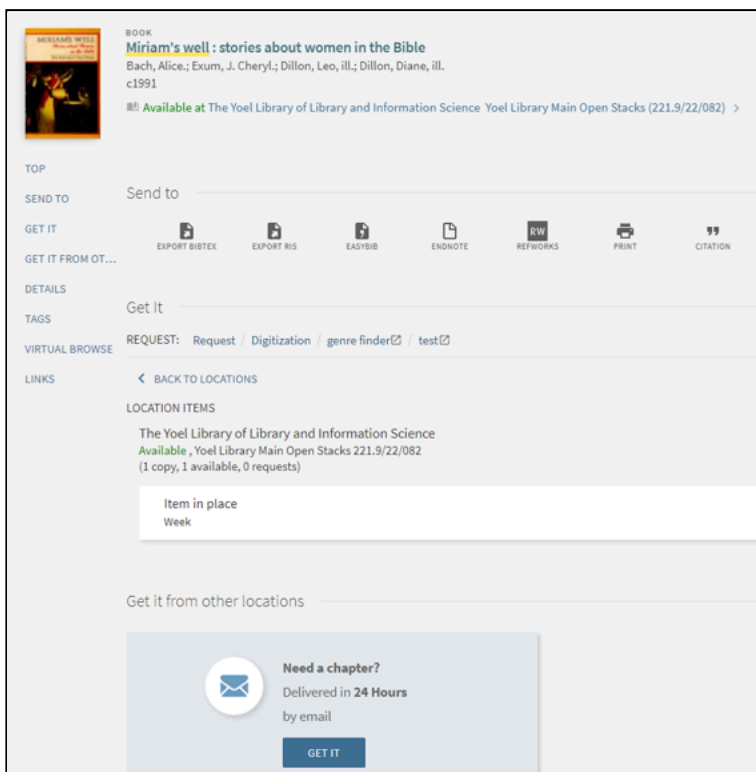


Document Delivery for Owned Resources

Streamlining the Document Delivery Process

Create one streamlined process for document delivery for both resources you own and resources you receive from other libraries by using a mediation rule to automatically create a lending request assigning the borrowing library as a partner. This means that your library is both the borrower and the lender.

Users can request digitization from the Rapido tile for printed resources whether or not the resource is owned by your library.



Document delivery

To request digitization for items you own:

- Ensure your Display Logic Rules allow the display of Rapido offers for digital requests for materials you own.
- Remove your digitization request link.

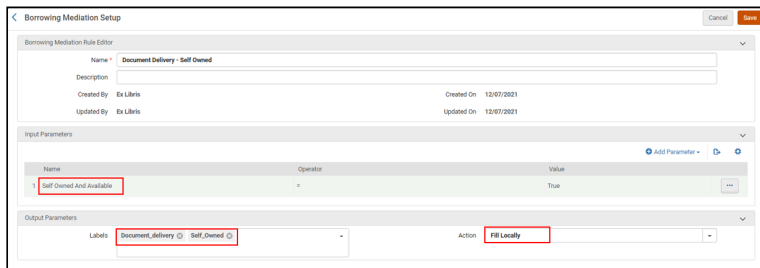
Automating the Process

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' interface. At the top, there's a 'Borrowing Mediation Rule Editor' section with fields for Name (Document Delivery - Self Owned), Description, Created By (Ex Libris), Updated By (Ex Libris), Created On (12/09/2021), and Updated On (12/09/2021). Below this is the 'Input Parameters' section, which contains a table with one row: Name 'Self Owned And Available', Operator '=', and Value 'True'. The 'Output Parameters' section shows Labels 'Document_Delivery | Self_Owned' and Action '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](#).

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.

Defining Participating Items for Fill Locally Mediation

Participating items can be defined to help libraries manage requests for items eligible using the fill locally mediation.

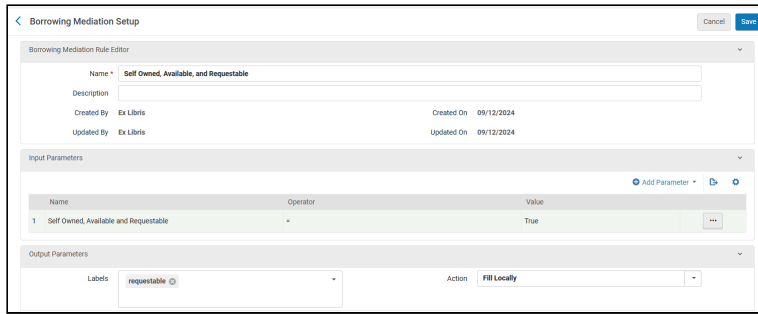
Once configured, this functionality enables libraries to apply the **Fill locally** action to defined participating item sets. This supports libraries that can only fill locally from specific collections by streamlining the workflow and only applying the **Fill locally** action to requests defined as participating items.

Note

The Fill locally action is only available for digital requests.

The configuration includes two parts:

1. The mediation input parameter **Self Owned, Available and Requestable** ([Configuration > Resource sharing > Rapido Rules > Borrowing Mediation Rules](#)) (values `True/False`) is used in combination with the **Fill Locally** action.
2. The functionality is in combination with the participating items defined using portfolios.



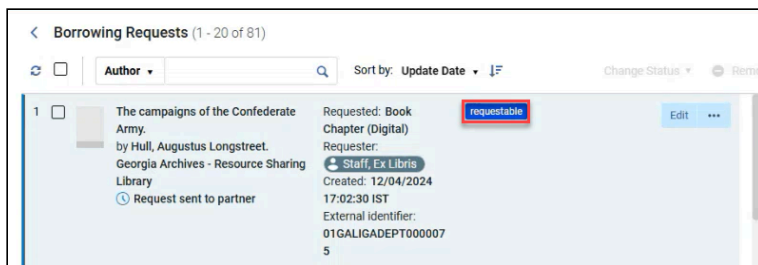
Self Owned, Available and Requestable rule

To determine which portfolio items are mediated and receive the **Fill locally** action with the **Self Owned, Available and Requestable** parameter, the **Digital Lending Policies** tab ([Configuration > Resource sharing > Configuration > Members](#)) now includes a section for **Participating Workflow Sets**. See [Configuring Digital Lending Policies](#). The **Participating Workflow Sets** enables a library to define which items and portfolios should be considered when determining whether to activate the **Fill locally** action.

When selecting **Add Participating Workflow Sets**, select the **Workflow** `Fill Locally`, and select the set from the **Add Sets** list. Supported sets include those in Electronic portfolios and Physical items.

When the mediation rule runs, if both physical and electronic inventory are available for a given request, the electronic inventory is prioritized to ensure both the quickest turnaround time and the easiest workflow for the staff.

When a borrower receives a request that can be filled locally, the **Fill locally** action is applied, and the borrowing request receives the **Request sent to partner** status while the request is filled through the library's lending workflow.



requestable

The search for a requestable item now applies to manual locally filled requests from the borrowing task list. The parameter **Self Owned, Available and Requestable** check is not applied when a **Self Owned and Available** rule is configured.

Note

The **Self Owned, Available and Requestable** rule only applies to holdings with items or electronic portfolios. Institutions with holdings without items should prioritize the **Self Owned, Available and Requestable** rule above the **Self Owned and Available** rule.

Overriding Local Holding Setting

RapidILL checks for self ownership, and requests identified as owned receive the local holding status. When the checkbox **Ignore Local Holding** ([Fulfillment > Resource Sharing > Partners > Parameters](#) tab) is checked, libraries skip this self ownership check by RapidILL.

Note

This configuration may be of particular interest to libraries using Rapido mediation rules that support staff workflows around local holdings. This includes mediation rules ([Configuration > Resource Sharing > Rapido Rules > Borrowing Mediation Rules](#)) with **Self Ownership** or **Self Owned And Available** with the operator values set to `true`. Mediation rules with either of these parameters support library workflows that enable libraries to fill these requests before they are sent to the RapidILL network. If staff decisions are to allow for fulfillment by their partners, these requests would then be sent to the RapidILL network. The requests can be stopped by RapidILL again and assigned the status of **Local holding**. Currently, staff then need to use the **Override local holding** action for the request to actually route to other partners. The **Ignore Local Holding** setting on the RapidILL partner can support staff who are using mediation rules to handle requests with self ownership/self owned and available.

Note

Requests with a mediation rule ([Configuration > Resource Sharing > Rapido Rules > Borrowing Mediation Rules](#)) to stop requests for self-owned resources (**Self Ownership = True** and **Self Owned And Available = True**) are stopped regardless of the **Ignore Local Holding** setting.

The screenshot shows the 'Resource Sharing Partner' configuration interface. The 'Parameters' tab is active, and the 'Ignore Local Holding' checkbox is checked and highlighted with a red box. Other visible fields include URL, Password, Requesting Branch Name (Main Library), Default Library Owner (Resource Sharing Library), Username, and Requesting Rapid Code.

Ignore Local Holding

If none of the Rapid partners have the requested item, the request status is set to **Rejected by partner**.