

## Rapido Borrowing Mediation Rules - Script

Hello,

In this video we will discuss the Rapido borrowing mediation rules. Why do we use them, How to create them and look at some examples.

Rapido automates and simplifies borrowing and lending, helping library staff manage a high volume of requests efficiently. For example, the borrowing library doesn't have to do anything in order for a request to be sent to the lender. But there are some cases in which we would like to stop the request before its being sent, and review it. For these cases, we have the Borrowing mediation rules.

To create and manage the Rapido borrowing mediation rules let's go to the Alma configuration menu, Resource Sharing, Rapido Rules, Borrowing Mediation Rules.

Here you can see the list of mediation rules that have been configured in this institution. Mediation rules can be enabled or disabled. Note that mediation rules should be created if necessary, by your institution according to your own needs.

There are different types of mediation rules, for example, missing Metadata elements such as ISSN. If the patron submitted a request without the ISSN, it will be stopped for mediation. Another different mediation rule could be defined for a specific user group – to stop for mediation by user group, for example, undergraduates.

Let's go and define a new mediation rule. Click "Add rule" and add the rule's name and description. In this case we want to create a mediation rule for missing ISBN. Meaning, this rule will stop all patron's requests that don't have an ISBN.

Now let's add the parameter, in this case the parameter is "Missing Book Metadata Fields". Choose the parameter according to the rule you are creating.

I'll choose the In List, and the value that will be missing – there are many values options for missing Meta Data, pages missing, or chapter. In our case it's ISBN. Note that you can combine and create one rule for various missing metadata elements. Click "Add Parameter".

Rapido allows you to add a label to your rule, so that the request will be marked very clearly to the staff. Labels added to the requests are easy to view on the Rapido requests task lists. Let's add a Missing ISBN label. Since the label has already been used in the institution it can be selected from the list, otherwise you can create a new one as needed.

Now, every request that will be coming without an ISBN will be stopped and will have a missing ISBN label.

It is recommended, that when adding a label, add a clear and specific one that can be dealt with later during staff mediation. And Save.

The rule has been added at the bottom. You can move it to the top if you want but it doesn't have any impact on the system. Now let's see how this rule effects the system.

In the patron interface, we are creating a blank request. When filling information, this is where usually things can go wrong. Let's fill in only the title and send the request. The request is successfully placed.

In general terms, Rapido will attempt to automatically find the lender for that request. In this case, because of the mediation rule, the request is going to stop for mediation.

Let's now look at the request in the borrowing library.

We access the borrowing and lending requests through Rapido Sets. In this case it's a borrowing request, that was created today.

This is the request that has just been placed. It is in the status "Created borrowing request" and has a "Missing\_ISBN" label attached to it. Meaning, the request was created, and the borrowing library can see it. But cannot assign it to a lender. In order for the resource sharing process to continue we need to resolve the problem. In this case, we just need to add an ISBN. We'll click edit and add the relevant ISBN to the ISBN field. Click save, and the status has changed. Now the system will proceed with the request.

You can now remove or leave the label or add a new label that will indicate that you've added the ISBN.

You can also use the facets to refine the requests by "Missing ISBN" label, and create a set for future use. Let's look at a more complex example.

In the Borrowing Mediation Rules List, we have the mediation rule "Request has note by patron". As you can see, the parameters here are different.

Request with note is not empty, meaning the patron has added a note while placing the request. And the output is a label "Patron\_note". Every time the patron adds a note the request will be stopped, and a label will be added. But you can see that there is an additional parameter: Labels, Not in List, Note\_reviewed". The rule will only stop the request if it has a patron's note and if there is no label that says "Note\_reviewed". Let's see how this rule works.

Back as a patron, we search for a subject we're interested in, and here is an article we want to get. Let's get it, and add a note saying this request is urgent.

Sign the copyright for digital, and send. Let's go ahead and take a look again at what happened in the borrowing library.

We're entering the Rapido sets, borrowing requests, created today. Here's the article that we've asked for, and the status is ready to be sent. If we click here we can see the note that was added by the patron, that this is urgent. And as defined in the mediation rule, a "Patron\_note" label was added.

We need to release this request, without removing the note because this is information from the patron that we want to preserve. The way to enable this request to be sent, is to add the other label mentioned in the rule: "Note\_reviewed".

Now the rule will not stop it. And indeed, we can see that the status was changed to "Request sent to partner".

Note, that mediation rules can be very complex. As you see in this example, they can have many parameters, as many as you need.

And this was a close look on Rapido Borrowing Mediation Rules. Thank you for joining!