Web Page Lending

Hello, this video is an overview of the Rapid lending workflows when using the Rapid web page for lending request management.

The entire lending workflow can be managed through the Rapid web page. This includes reviewing new lending requests that have been assigned to you by the Rapid system, printing pick slips, updating requests, and finally, request fulfillment and delivery to the borrowing library.

The Rapid Main Menu page provides me with an overview of our Rapid lending activity and is where I am alerted to new lending requests. We can also use this page to review requests that are in progress.

The Lending queues are broken out into request format. Journal article requests and book chapter requests are managed separately through their own queues.

We can see that there are new journal article requests. To review these requests, I simply click the queue. I can also click Expand All if I want more details for all my lending queues.

Now I see I have several requests in the New Request Batch Print queue. I click on this to see that the requests are in my Main Library branch. Some libraries use multiple Rapid branches to assign lending requests to different libraries or physical locations. You can even have requests for electronic journals or ebooks route into their own branch for processing. For example, some libraries have an eJournals branch that is specific for processing article requests in electronic journals. This is helpful if you prefer to manage your print and electronic requests separately. Please send the Rapid team a note if you are interested in this option.

I'm going to review these new active requests by opening the Main Library queue. This pulls the requests up in a new browser tab. Now I can see all the details for these requests, including the borrowing library, citation information, and my local call number and location. This first request is for an item in our electronic collection, and the call number is a URL that should help me locate the article in our electronic resources. The second request is for an item in our print collection, it has a physical call number and print location.

We can also see there are Action items associated with each request. As a Rapid lender, we can update a request to Filled, Unfilled, or Bad Citation. The Move update here is a process that's only used by a couple Rapid libraries for unique multi-branch workflows, so we'll just ignore it. We'll also not worry about the Fill update – generally, when you use the Rapid web page for lending, you update a request to Filled by uploading a file to the RapidX service. We'll cover this workflow in another video.

If we know we are unable to process a request in this queue, we can simply click Unfill, and that will move the request to a new Rapid lender and complete the request for us as the lender.

We can print requests from these queues by clicking the Print button at the top. Requests print one to a page and in call number order. Once we have printed the requests, we click Done Printing. The requests have moved to the Batched Requests queue. I can open this queue at any point to review this batch of requests.

While we should be able to fill most of our lending requests, we'll sometimes need to cancel a request because the item is not on shelf, or otherwise not available for processing. As we saw earlier, we can update a request to Unfilled, which is the Rapid term for cancelling a lending request, through the lending queues. I'll pull up our recent requests under Aging Status, as an example, and I'll cancel this request by clicking Unfill. You can see the request is removed from the queue and will also no longer be found in the Aging Status queues. We have completed this request.

Another way we can cancel or Unfill a request is through the Batch Update page. This page is accessed under the Lending Drop down menu. This page is ideal if you need to update several requests at a time. I'll add my Rapid number to one of the fields, choose my up status, and click Update. The green note lets me know the request has been successfully updated. If there is an update issue, Rapid will provide me with an error message. For example, I'll try to update this Rapid number again. The system tells me that this request has already been moved on to another lender.

I'm not going to worry about the Filled and Re-Fill updates here, again, when we Fill requests as a lender using the web page, we do so through the RapidX service.

The Undo update allows me to remove an update made in error. For example, if I mistakenly update a request to Filled, I can remove the update by choosing Undo and updating again. There is a short window of time I am able to use the Undo update, so I want to update as soon as I realize I've made an error.

Finally, as a lender we will occasionally receive a Resend request if the borrower finds the copy provided was not suitable. I can see one new Resend request under our Journal Articles section. If I pull up the request, I can see the note the borrowing library provided. From here, the request can be updated as any other lending request, I can Unfill it, to move it to a new lender, update it as a bad citation, or process it through RapidX for fulfillment.