Rapido Implementation  
Rapido Digital Prerequisites

Hello,

While your Rapido member, using the Rapido pods handles your physical requests, the borrowing and lending requests for digital items such as articles and book chapters will automatically be sent to RapidILL. In this session we will show the configurations that are needed to use RapidILL and perform digital resource sharing.

First, you’ll need to set up your RapidILL partner. Go to Fulfillment> Resource Sharing> Partners. Search for Rapid, If you don’t have a partner, click Add Partner. and Edit it.

Within the General Information tab, in the Profile Type and under System Type, enter RapidILL, and in the Name enter Rapid. Check the Supports Borrowing and supports lending workflows and choose the Rapid workflow for your support borrowing workflow. Note, that this workflow determines which processes this RapidILL partner will support. To select which specific workflow steps will be supported, go to Configuration> Fulfillment> Resource Sharing> Workflow Profiles, either add or edit an existing workflow, here we edit the Rapid borrowing workflow. Check all the steps you would like this profile to support. Check the cancelled by staff, and by patron if you want to allow the patrons to be able to cancel their requests. And we recommend checking Reactivated to allow staff to reactivate requests. And last – make sure Waiting for receive digitally is unchecked. Back in the RapidILL Partner settings, Under Parameters, the URL will be added automatically, and the password will be given to you by the implementation team. The Requesting Branch Name will be given to you by the implementation team too, usually it is “main library,”. The Default Library Owner should be your resource sharing library. The Username and Requesting Rapid Code will also be given to you by the implementation team, you can use them to access RapidILL directly. Note, that if you have different branches which work with different resource sharing libraries, you will need to set up a RapidILL partner for each one, with the right library and branch. If you are not sure what the right parameters are, your implementation team will provide you with them.

The next step is the integration parameters with RapidILL. Go to Configuration> Fulfillment>General> Other Settings. Find the word RapidILL in this page. There are 4 parameters you need to configure. The first one, the number of views of RapidILL document, will determine how many time you allow your patrons to download the items they receive. The out of the box setting is 2.

The second one, borrower\_document\_delivery\_send\_automatically, will determine whether to send the items that the lending institution sent, automatically to the patron, The default is yes, true, and we recommend keeping it that way, unless you have a specific need for an intervention. The third and fourth parameters support borrowing and lending integration with RapidILL. Those two need to be set to True if you want both processes to be working with Rapido. And Save.

The next configuration will determine the document delivery method – whether the document will be sent as a link or as an attached file. Still within the Configuration go to Fulfillment> Copyright Management> Digitization and Copyright Rules. Add a Resource Sharing Digitization rule, for lending requests, meaning with Request Type equals Lending resource sharing digitization request. And Add Parameter. And under Select digitization target, choose the document delivery method you prefer. We recommend choosing a link, since the attachment method will limit the size of the file you’re uploading to 25 MB. And the Maximum views should be the same as the number you’ve entered in the integration parameter. And Save.

Next, you need to set up a document delivery notification letter. This letter is used to let a patron know that the item they’ve requested to be digitized is ready for them. Still under Configuration, go to General> Letters> Letters Configuration. Search for document delivery and find the Document Delivery Notification Letter. And Edit. Use the Preview Letter option to review the current version of the letter, and under labels choose which labels you would like to keep in the letter and which to remove. For example, you don’t need to display all the possible links but only the ones that are relevant for your institution. Disable the ones that are not relevant, comment them out in the XSL and Save.

And last, when lending to other institutions, you need to define which items you allow to be digitized. We’ll do it by adding a fulfillment unit rule (or by using the same one that you used for the physical items if applies) . Under Configuration go to Fulfillment> Physical Fulfillment> Fulfillment Units. Here, according to the items you allow to digitize, choose the fulfillment unit. Under Fulfillment Unit Rules, choose Rule Type: Request, and add a rule that is based on either item policy, location, or material type – in this example it’s location, that within the Terms of Use, allows digital resource sharing.

Now you are set up to start working with digital requests in Rapido.

Thanks for watching!