Rapido Implementation
Working with Partners Beyond Your Pods

Hello,

Rapido supports resource sharing between institutions by using pods. Pods are the group of libraries, partners, that have agreed to do resource sharing between them. They have a lending policy and a delivery time which are shown in the Rapido offers. They are created and associated by Exlibris.

But there are cases where you would want to have resource sharing relations with partners who are not part of a pod you belong to. This session will explain the peer to peer options that enable you to work with partners beyond your pods. The Find Partners option, Adding Partners, Email partners and partners of last resort.

In a situation where your request wasn’t fulfilled by one of your pod partners, Rapido allows you to continue searching for the item in other partners.

The first option is the Find Partners option. Institutions that added themselves to the resource sharing directory and turned-on data sharing. To see them, from the borrowing request choose Find Partners. This is a list of potential lenders who hold and have lendable terms for the material needed by the patron. Select one or more and create Rota. This will initiate a partner set up process that will allow borrowing and lending items with that partner. For more information about the Find Partners option watch a designated video or search for it in the Knowledge Center.

The next option is to reach out to partners that you think might have the item. Under Fulfillment > Resource Sharing > Partners. They can either be part of the resource sharing directory – under Community, or not – under institution. In the community, this is a list of institutions that added themselves to the community. To work with them, from the row action list choose Copy. This will download their partner data and locate profile to your institution’s list of partners; you will need to reach out to them so that they will agree to work with you and download you too from the community. This option will require a one time set up of that institution for them to become a partner.

To add institutions that are not part of the resource sharing directory but work with Alma or support the ISO protocol, under Institution, click Add Partner. Let’s look at an existing one. Fill in the General Information, including Code and Name of the institution, whether it’s an ISO profile or Email. If it’s an ISO partner, select which system they are using and fill in the rest of the information, including required Parameters. If the only way you can communicate with an institution is through email, in the Profile Type, choose email, Enter the institution’s details, including their email and Save. For more information about adding partners search for resource sharing partners in the Knowledge Center.

Now, after you’ve added the partner, if a request was stopped without finding a partner that has the item within Rapido pods, and you as the librarian searched for it and found it at this partner, you can manually send the request to them. from the request click Edit, Add Partner and check the relevant partner. And Select.

Note, that Peer to peer partners will not use the Rapido terms since they are not part of the Rapido pods. They will use the Resource Sharing library Fulfillment Units rules to determine the lending terms and will apply the lender’s due date for borrowing requests.

If you have several non-Rapido ISO profiles pods partners that you’ve added, you can automate the searching process by adding them as a Rota with a Rota assignment rule or as a locally manage Rapido pod. Under Fulfillment > Resource Sharing > Rota Templates, Add Template, Let’s look at the one we’ve created for this Rota. add the General Information, if you are going to use the Pod Priority table, select Locally Manage Rapido Pod, and the Template Members, and Save. Once you have a Rota, and you checked it as Locally Manage Rapido Pod you can add it to the Pod Priority table so that Rapido will search automatically within these partners, otherwise, add it as an assignment rule, from Configuration > Fulfillment > Resource Sharing > Rota Assignment Rules add an assignment rule for that Rota. For more information about how to set up and utilize the Locally Manage Rapido Pod, search for it in the Knowledge Center.

If you still maintain other resource sharing systems such as ILLiad, Reshare or Tipasa and your pod partners and peer to peer partners couldn’t fulfill the borrowing request, you can send it from Rapido to that system to be further processed. To do that, you need to first set it up as a partner of last resort. Go to Fulfillment>Resource Sharing > Partners and add Partner. For this example, let’s look at an existing one. Enter the general information, including the system type. And under Parameters, make sure to set up the EXPORT TO THIRD PARTY section. And Save. Then, like we did earlier in this session, create a Rota Template, and for Rapido to automatically use it as a partner of last resort, add an assignment rule at the Rota Assignment Rules page. Now, when Rapido will search for the item, after going through the pods priority and the item wasn’t found, it will work with the Rota assignment rules, and will send the request automatically to that partner.

Now you’re familiar with the ways to work with partners outside your pods.

Thanks for watching!