

Removing Resource Sharing Requests from Special Collections Records

Goal:

Hide the Resource Sharing Request link on Special Collections Records, so that patrons would instead use the Aeon General Electronic Service to request access to these materials.

Solution Summary:

Create a new GES that identifies the records you want the Resource Sharing Request hidden on. The new GES must be set to appear on ViewIt, GetIt, and HowtoGetIt sections. Then create two Display Logic Rules: One to hide the Resource Sharing Request when the new GES is present, and a subsequent rule to hide the new GES.

Background:

Using Display Logic Rules (Config > Fulfillment > Discovery Interface Display Logic > Display Logic Rules) we can hide one service when another one is present on a record. However, when creating a rule to hide the Resource Sharing Request service, only a subset of our General Electronic Services were eligible as criteria. It appears any GES that is set to display in the GetIt/HowtoGetIt sections were not eligible.

At UCSC this meant we could not use the presence of our Aeon GES as the criteria to hide the Resource Sharing Request. Our Aeon GES needed to be a GetIt/HowtoGetIt GES because that was the only way to include item-level metadata in the URL for the service, which is a requirement in our local setup.

Solution in Detail:

1. Create a new GES (Config > Fulfillment > Discovery Interface Display Logic > General Electronic Services > Add Service). Set it to display in the GetIt & HowtoGetIt sections. Check "Yes" for Item Level and Enable without login. We gave ours some sane defaults for URL and public name in the unlikely scenario it displayed to an end-user.

Screenshot of the GES details:

Service Details

Service Availability Rules

Active **Active**

Service Code * **Spec Coll Item**

Service Name * **Spec Coll Item**

Service Description **Identify SPC records so we can hide Resource Sharing Requests**

Public Name **Special Collections Item**

Public Note

Is this a Document Delivery/ILL service? No Yes

Display Location * **Getit & How To Getit**

URL Template * **http://library.ucsc.edu**

Enable without login No Yes

Item Level No Yes

Disable service **Never**

When resource is owned by the campus

- Set the Service Availability Rules so the GES appears on all records you want it to appear on. Ensure the Default general electronic services rule for this GES is set to False. For UCSC, our rule checks the location of the item, and if it's in a Special Collections location display is set to True.

Screenshot of the Service Availability Rules overview:

Service Details | Service Availability Rules

+ Add Rule | [Share] | [Settings]

Filter: All

Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date	
<input checked="" type="checkbox"/>		[v]	If location is in SpecColl, display = true	-	Schwab, Ryan William	08/02/2021	[...]

Default Rule

Rule Name	Description	Updated By	Update Date	
1 Default general electronic services rule	Default general electronic services rule	Schwab, Ryan William	08/02/2021	[...]

Screenshot of our Service Availability Rule:

< Edit rule | Cancel | Save

Name * If location is in SpecColl, display = true

Description

Created By Schwab, Ryan William | Created On 08/02/2021

Updated By Schwab, Ryan William | Updated On 08/02/2021

Input Parameters

Name	Operator	Value	
1 Location	In List	McHenry Library - Spec Coll, McHenry Library - Spec Coll Annex, McHenry Library - Spec Coll Annex Oversize, McHenry Library - Spec Coll Flat Files, McHenry Library - Spec Coll Maps, McHenry Library - Spec Coll Microfilm, McHenry Library - Spec Coll NRLF, McHenry Library - Spec Coll Oversize, McHenry Library - Spec Coll Oversize Maps	[...]

Output Parameters

IsDisplay * True

- Back on the Service Details tab, switch the GES to display on Getit, viewit & How To Getit. It was necessary to have it on Getit/Howtogetit to enable it as an Item Level GES, which in turn allows you to set the availability rule based on location (an item level field). Now it must be set to display on all 3 in order for this setup to work across all resource types.

Screenshot of the GES in its final state:

Service Details	Service Availability Rules
Active	<input checked="" type="radio"/> Active
Service Code *	Spec Coll Item
Service Name *	Spec Coll Item
Service Description	Identify SPC records so we can hide Resource Sharing Requests
Public Name	Special Collections Item
Public Note	
Is this a Document Delivery/ILL service?	<input type="radio"/> No <input checked="" type="radio"/> Yes
Display Location *	Getit, viewit & How To Getit
URL Template *	http://library.ucsc.edu
Enable without login	<input type="radio"/> No <input checked="" type="radio"/> Yes
Disable service	<input checked="" type="radio"/> Never <input type="radio"/> When resource is owned by the campus <input type="radio"/> When resource is owned by the campus and available

4. Create a new Display Logic Rule (Config > Fulfillment > Discovery Interface Display Logic > Display Logic Rules) to hide the Resource Sharing Request when your new GES is present.

Screenshot of our rule:

Edit Rule

For user from groups	<input type="text"/>
hide service *	<input type="text" value="Resource Sharing Request"/>
with	<input type="text"/>
with value	<input type="text" value="-"/>
if exists service	<input type="text" value="General Electronic Service"/>
with	<input type="text" value="Service"/>
with value *	<input type="text" value="Spec Coll Item"/>

Cancel

Save and Close

5. Create a new Display Logic Rule to hide the new GES.

Screenshot of our rule:

Edit Rule

For user from groups	<input type="text"/>
hide service *	<input type="text" value="General Electronic Service"/>
with	<input type="text" value="Service"/>
with value *	<input type="text" value="Spec Coll Item"/>
if exists service	<input type="text"/>
with	<input type="text"/>
with value	<input type="text"/>

Cancel

Save and Close

6. Ensure that the rule that hides your GES comes after the one that hides the Resource Sharing Request (these rules are executed in the order they appear, so you don't want to hide it before it gets used to hide the Resource Sharing link). Check that both your rules and your new GES are activated.