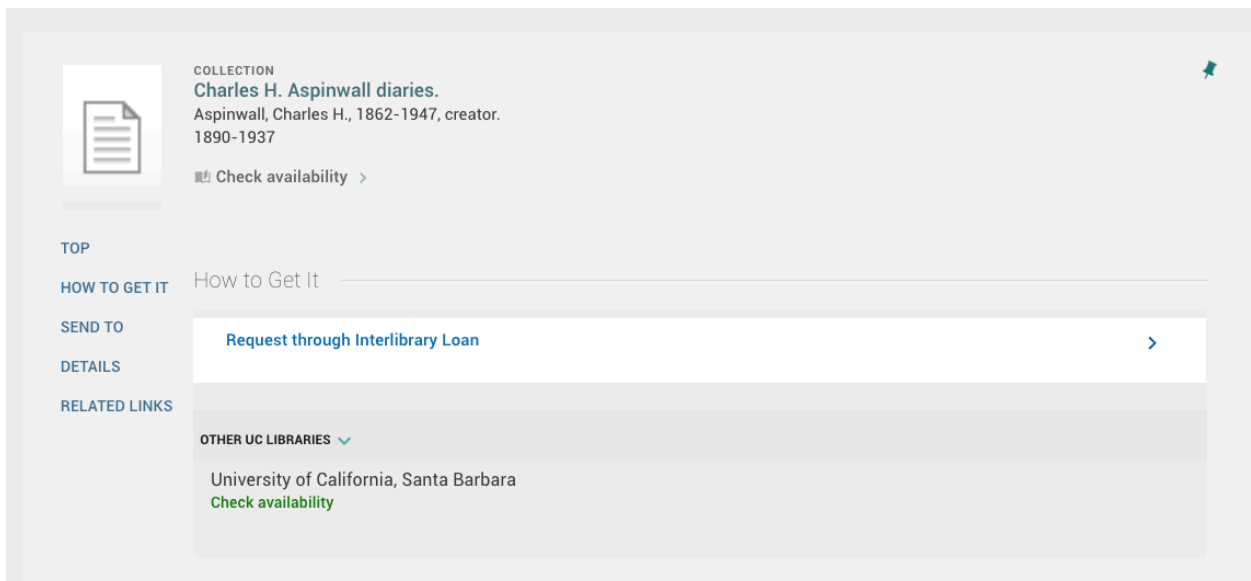


Exclude from Discovery Network vs Restrict Resource Sharing by Location

Background:

Need:

Campuses have materials that cannot be shared via intercampus resource sharing (eg. some Special Collections items (especially archival collections)¹, equipment, etc.). Even though the Terms of Use in Alma may prevent the lending of these materials, a Resource Sharing link (“Request through Interlibrary Loan”) still appears in the Primo record for these items, when discovered via other campus UC Library Search views. The presence of this link may give users a false expectation that the item can be successfully borrowed from another campus.



The screenshot shows a Primo record for a collection. At the top, there is a document icon and the text: "COLLECTION Charles H. Aspinwall diaries. Aspinwall, Charles H., 1862-1947, creator. 1890-1937". Below this is a "Check availability" link. On the left side, there is a navigation menu with "TOP", "HOW TO GET IT", "SEND TO", "DETAILS", and "RELATED LINKS". Under "HOW TO GET IT", there is a "Request through Interlibrary Loan" link. Under "RELATED LINKS", there is a section for "OTHER UC LIBRARIES" which includes "University of California, Santa Barbara" and a "Check availability" link.

Record of a UC Santa Barbara archival collection in the UC Santa Cruz Primo includes Resource Sharing link

¹ Special Collections can, and do, share some materials via intercampus resource sharing.

The screenshot shows a library record for "MSI Sandbox VR Laptop" (2013). The record includes a "Check availability" link, a "Send to" section with options like Endnote, BibTeX, RIS, EasyBib, Print, Citation, Permalink, and Email, and a "How to get it" section with a "Request through Interlibrary Loan" button. A section for "OTHER UC LIBRARIES" lists "University of California Irvine" with a link "Available in institution". A "Details" section provides metadata: Title (MSI Sandbox VR Laptop), Creation Date (2013), Source (Library Catalog), Local Subject (Laptops), and MMS ID (991035135491904701).

A record for a Laptop available from UC Irvine, as seen from UC Davis Primo. Again, the Resource Sharing link is viewable. Addition

Potential Solutions:

Discovery FG has identified two options for preventing users from encountering a Resource Sharing link in items that are not requestable.

- 1) Exclude the bibliographic record from the Discovery Network
- 2) Disable resource sharing for all items from a specified location

Request for Feedback:

Discovery FG is asking campuses to provide feedback around the following question:

- Should we facilitate the option to use either, or both, solutions (Exclude from Discovery Network and Restrict Resource Sharing by Location) or should Restrict Resource Sharing by Location be the only option?

Exclude from Discovery Network:

Excluding records from the Discovery Network requires two actions:

- 1) The record-holding campus must modify their MARC record to include **520 __ \$\$a Exclude from discovery network** (ongoing)
- 2) All campuses must modify their configuration for the Articles, Books, and More search profile configuration (one time)

Records that are excluded from the Discovery Network can still be surfaced in the Primo of the owning campus, but cannot be surfaced in the Primos of other campuses.

Pros and Cons:

Pros:	Cons:
<ul style="list-style-type: none">- Allows granular selection of records- Prevents unshareable items from being displayed by users who cannot access them- Can be applied to items without physical locations (eg. eBooks, streaming media, etc.)	<ul style="list-style-type: none">- Requires modification of MARC records- Requires all campuses to change their default search profile- Requires addition of a Normalization rule to exclude the 520__\$\$a field from public display

Restrict Resource Sharing by Location:

Restricting resource sharing by location requires the restricted location be added to a list in the Network Zone (see ExLibris documentation on [Configuring Resource Sharing Restriction Rules for Primo VE](#) for more details).

Items in a restricted location are not eligible for request. If a record only has holdings for items in restricted locations, no Resource Sharing link will appear in that record. Note that the Resource Sharing link will appear if there are any holdings available from other non-restricted locations.

Pros and Cons:

Pros:	Cons:
<ul style="list-style-type: none">- High efficiency- Relatively low effort- Low risk- Retains record in the Discovery	<ul style="list-style-type: none">- Does not allow for any granularity within a location- Does not work for items without physical locations

Network to facilitate alternative access options (eg. Aeon Request) and/or user awareness

The screenshot shows a Primo record page for an archive collection. At the top left, there is a 'BACK TO RESULTS LIST' link with a magnifying glass icon. Below this is a box icon representing the collection. The main title is 'Helen Hihn Younger Goode collection, 1858-1971 1890-1955'. Below the title, it lists the creator and former owner: 'Goode, Helen Hihn Younger, 1934-, creator.; Goode, Helen Hihn Younger, 1934-, former owner.' and the dates '1858 - 1971'. There is a 'Check availability' button with a checkmark icon. Below this is a 'Send to' section with a search bar and several icons for actions: EXPORT TO EXCEL, EMAIL RECORD, PERMALINK, CITATION, PRINT, and EASYBIB. Underneath these are 'GET IT' options: ENDNOTE BASIC and EXPORT RIS. A yellow box with the text 'No available services for this item' is displayed. Below this, it states 'There are no available requests for this record'. A section titled 'OTHER UC LIBRARIES' shows 'University of California, Santa Cruz' with the status 'Available in institution'. The 'Details' section lists: Creator (Goode, Helen Hihn Younger, 1934-, creator.), Title (Helen Hihn Younger Goode collection, 1858-1971 1890-1955), Format (1.08 linear ft. (2 boxes)), Publication Date (1858 - 1971), Notes (Gifts of Helen Hihn Younger Goode, 1993-1994.), and Description (This collection contains materials documenting the Hihn and Younger families of Santa Cruz, California, from the late 19th to the mid 20th century. Materials were collected and donated by Helen Hihn Younger Goode, the daughter of Donald Younger and Marian).

Record in UC Irvine's Primo showing an item only available in a restricted location at UC Santa Cruz

Summary:

Should we ask all campuses to modify their Articles, Books, and More search profile in order to facilitate exclusion of records from the Discovery Network? Or, should Restrict Resource Sharing by Location be the only option?