

### 3/23/2022 - Local Resource Type Task Force Meeting Minutes

Attendees: Heidi, Megan, and Brian, Brenda, Kimberly, Michelle and Shannon

1. Maggie announced she is leaving SUNY and that Michelle will be taking over as chair for the LRT task force
2. Asked if any questions from the session before – none
3. Discussed the Alternatives Institutions can use if LRTs are not being used at the Network level.  
**Note:** LRTs and the alternatives can be used individually or in conjunction with one another.
  - a. Create Discovery Collections to highlight resources (example Fredonia)
    - i. Michelle added that resource recommender can be used to the link to the discovery collection
  - b. Use a local field to create a facet and for search that is also searchable (example Geneseo)
    - i. Define local field to be used in the Institution
      1. If using a field being used for other purposes, add a \$\$2 with a code/word to define it so the local display field can pull it
    - ii. Add the local field at all records that it will be added to
    - iii. Create a local display field for the local field to be used in facets and search
      1. Enable search and facet
      2. Create the display norm rule and display norm rule for search and facet
    - iv. Apply the rules
4. What is required is using LRT in the Network using a consortial defined field in NZ records to create a LRT rule to easily apply to records
  - a. Define 979 (last consortial local field) for LRTs
    - i. 979 can use a word or words for the LRT
      1. Easier than regex and a combo of fields and regex
      2. Removes the limitation of max. 4 conditions
    - ii. Need to be added to NZ records
      1. In testing, make sure merge rule does not remove the 979 field
    - iii. Add the local extension at each institution for IZ only records
      1. Make sure to used add local extension and/or write a rule that adds \$\$9 local
    - iv. Create the LRT(s) in the NZ
    - v. Recalculate the NZ records affected records in the NZ
    - vi. Create the LRT(s) in the IZ
    - vii. Recalculate the affected IZ only records in the IZ
5. Other Consortial use of LRTs:
  - a. Orbis Cascade and Cal State moved from Primo Back Office where they used local resource types in the Network heavily. In Primo VE, they are going to continue to use the Network local resource types they had in back office.
    - i. Orbis is using a Network defined field to make create LRT rule conditions easier
    - ii. Cal State said they need to decide if they will add more.
  - b. Have not hear back from WRLC yet
6. Maggie is testing if using 979 in NZ records for more than one LRT will cause conflict