



Quick Reference: Configuring Fulfillment at Four Levels

Introduction

The Four Levels enhancement provides libraries the opportunity to interoperate with a supported ILS OPAC at the third level of relevancy. The library will also be able to configure fulfillment options at all four levels within WorldCat Local. Currently libraries may only display availability and a Place Hold button at relevancy levels one and two. At relevancy levels three and four, the only fulfillment option is a button linking to their OCLC ILLiad, WorldCat Resources Sharing service, or other Open URL 1.0 compliant resource sharing services.

This document describes the **OCLC Service Configuration** modules that support the expanded fulfillment option functionality:

- Full Text OpenURL Resolvers
- Place Hold/Request Buttons
- OPAC Statuses, Location and Circulation Policies
- Holding Codes Translation Table

For further information, please see our [tutorials](#).

Full Text OpenURL Resolvers

Use this screen to specify the OpenURL Resolvers that will display.

Miscellaneous

Open all 856 links in a new window

Check the box to allow all online links to open in a new window when a user clicks the link.

Full Text OpenURL Resolver (optional)

OCLC has attempted to determine your Full Text OpenURL Resolver and your ILLiad resolver and incorporate them into your WorldCat.org. However, if either is missing or not working as expected, please supply the URL to the correct resolver. If you have a full text OpenURL Resolver configured to display, a button or link to the resolver will display to users.

If you do not have an OpenURL Resolver, and don't have plans to get one, OCLC can assist your library in establishing OpenURL resolution using [WorldCat Link Manager™](#).

Which Full Text Resolver should display?	Choose which level of resolver you wish to display from the drop-down list.
Button or Link Label	If you would like to change the label, type the text you would like to use for your full text button. For best display, keep this label under 30 characters. Click the check box to open the link in a new window when users click the button.
Configure the Full Text OpenURL Resolver for this WorldCat.org	Choose a Full Text OpenURL Resolver from the OpenURL Resolvers you have already registered with OCLC. Click View registered OpenURL Resolvers to go to your OpenURL Resolvers list in the WorldCat Registry™ .
For items held/ not held by...	Choose the option you prefer for when you want to display full text to your users at the local, group and worldwide levels. See Item Types for further information.

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Item types are described below:

Item Types	
Monograph (default type)	Anything that is not in one of the groups below.
Serial	Leader value of serial, not web-based.
Article	Leader value of article.
E-Serial	Leader value of text serial and cataloged as an internet resource. Also Leader value of Computer File and cataloged as an internet resource and serial.
Mass digitized electronic content	Electronic-only format and is known to be free.
All other electronic content	Any other electronic content such as e-computer files, e-audio, e-visual materials, and e-maps.

Note: Circulation data is defined in the [OPAC Statuses, Locations, and Circulation Policies](#) module.

When you are finished, click **Cancel** to start over, or **Save Changes** to save and continue.

Place Hold/Request Buttons

Use this screen to customize your **Place Hold** and **Request** buttons.

Place Hold/Request button (Level 1)

If patron-initiated requests are allowed, a fulfillment button will appear to users. You may customize the button by providing the following:

Level 1 Button Label	<p>What terminology do you prefer for patron-initiated requests for items in your collection? For best display, keep this label under 25 characters. Click the check box to open the link in a new window when users click the button.</p> <p>Note: This button text will be used in the select menus under the For items owned by... section.</p>
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Place Hold/Request button (Level 2, and Level 3 if applicable)

If patron-initiated requests are allowed, a fulfillment button will appear to users. You may customize the button by providing the following:

Level 2 (and Level 3 if applicable) Button Label	<p>What terminology do you prefer for patron-initiated requests for items in your group's collection? For best display, keep this label under 25 characters. Click the check box to open the link in a new window when users click the button.</p> <p>Note: This button text will be used in the select menus under the For items owned by... section.</p>
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Resource Sharing (Any Level)

If you have Resource Sharing Management software that will accept incoming OpenURLs, you can configure it as your resource sharing option in WorldCat Local. If you do not have resource sharing configuration via OpenURL, WorldCat Local will display resource sharing options to your patrons when a user is IP authenticated to WorldCat Resource Sharing.

The resource sharing options configured at this level (regardless of who holds the item) will always be used. Currently, ILLiad is the only resource sharing option that can be configured as an OpenURL Resolver. If you do not have ILLiad, WorldCat Local will use WorldCat Resource Sharing to let patrons initiate interlibrary loan requests, as configured by WCRS.

Note: You may check the [WorldCat Services Administrative Module](#) for WCRS configuration by clicking **more about resource sharing**.

Resource Sharing Button Label	<p>What terminology do you prefer for patron-initiated requests for resource sharing? For best display, keep this label under 25 characters. Click the check box to open the link in a new window when users click the button.</p>
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	Note: This button text will be used in the select menus under the For items owned by... section.
Type of button configuration	Choose the type of button for your OpenURL Resolver.
Choose an OpenURL Resolver from the OpenURL Resolvers you have already registered with OCLC	Choose a resource sharing OpenURL Resolver from the OpenURL Resolvers you have already registered with OCLC. Click View registered OpenURL Resolvers to go to your OpenURL Resolvers list in the WorldCat Registry™ .
Configure an additional button (optional)	You may configure more than one fulfillment button to handle resource sharing requests (at level 2, 3, or 4), although only one button may show at a time. To configure an additional button, click Configure an additional button .

For items owned by...

Choose the options you prefer for when you want to display the fulfillment options to your users at the local, group and worldwide levels. Click the arrow next to each section title to expand or collapse the fulfillment options for each level. Local options correspond to the Level 1 Fulfillment column in the OPAC status table on the **OPAC Status, Circulation and Lending Policies** module. Group options correspond to the Level 2 and Level 3 (if applicable) Fulfillment column in the table, and worldwide options correspond to the Level 4 Fulfillment column.

[Click here](#) for more information on Item Types.

Note: WorldCat Navigator member libraries please contact **OCLC Customer Support** to make changes to these OpenURL Resolver Resource Sharing settings.

When you are finished, click **Cancel** to start over, or **Save Changes** to save and continue.

OPAC Statuses, Locations and Circulation Policies

Use this screen to define circulation and lending policies. WorldCat Local uses OCLC numbers to link between WorldCat Local and your catalog. Therefore, OCLC numbers must be present in your local catalog, and must be consistently indexed within your ILS.

If you would like to configure your WorldCat Local to search your library catalog using the **NISO Z39.50 Protocol**, you may also need to map the OCLC number index to an attribute in your Z39.50 server.

Local links to online content

WorldCat Local will attempt to get local OPAC links (for example, 856 links) to online content from the OPAC:

Which local OPAC links to online content should display in WorldCat Local: Links have been set at a default level. Click the check box if you do not wish to display OPAC links to online content that look like a duplicate of one already retrieved from the OPAC.

Note: These fields are not editable at this time. If you feel these are incorrect, please contact **OCLC Customer Support**.

Item Availability from the OPAC

WorldCat Local will attempt to get local item availability information from your local OPAC. The following information is listed for you in OCLC Service Configuration:

Select your ILS Vendor	Your ILS Vendor is listed.
Select your ILS Product/Version	Your ILS Product/Version is listed.
How should WorldCat Local get item information?	Shows your selection whether you want OCLC to "scrape" the information from the OPAC, or use Z39.50.

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Enter the URL used to search for items in the catalog by OCLC#	Enter the URL for your catalog. For example: http://olc1.ohiolink.edu/search/o77496353 Click the check box if you do not wish to display holdings and availability information that look like a duplicate of one already retrieved from the OPAC.
Would you like to treat some item types as a different kind of item?	Choose whether or not you want to use default WorldCat Local item types . If you want to treat some item types as a different item, provide that information in the table. Note: MARC fields are determined by the WorldCat Master record.

Note: Some of these fields are not editable at this time. If you feel these are incorrect, please contact [OCLC Customer Support](#).

Status messages

Please list all status messages and fulfillment options that appear in your OPAC. You can change the data in the table by typing directly in the table cells.

Note: If the item's library location impacts the policies you set for the item, please include all possible combinations of statuses and locations. If the location of an item does not impact the policies you set for the item, please leave the Location cell blank.

Status	Definition
OPAC Status Message	Item status message that WorldCat Local retrieves from your OPAC (e.g., In Process, On Shelf, etc.).
OPAC Status Code	Item status code that WorldCat Local retrieves from your OPAC.
Location	Item shelving location that WorldCat Local retrieves from your OPAC (e.g., Main Stacks, Reserves, etc.).
OCLC Standard	Maps your status string from the OPAC to a standard status

Status Message	(optional).
Status Treatment	Choose whether OPAC Status is available or unavailable. This also controls the availability messaging for items with this OPAC status.
Local Online Links	Choose whether to display any Online links that are found in your OPAC (e.g. 856 links) for items with this OPAC Status and Location combination.
Fulfillment for (Level 1)	For items held by Level 1, check when you want to display the Request Item button.
Fulfillment for (Level 2)	For items held by Levels 1 AND 2, check when you want to display the Request Item button.
Fulfillment for (Level 3)	For items held by Levels 1 AND 3, check when you want to display the Request Item button.
Fulfillment for (Level 4)	For items held by Level 1 AND WorldCat, check when you want to display a request button.
FullText OpenURL	Choose whether to display the Full Text OpenURL Resolver for items with this OPAC Status and Location combination.

Note: Depending on your institution's configuration, all columns may not be displayed.

To configure column options:

Step	Action	Result
1	Click column options .	The Column Options pop-up window appears.
2	Choose which column options you would like to see by clicking the Show and Hide buttons.	
3	For the columns listed, choose which logic to apply when determining what buttons or links should display based on the statuses and locations retrieved from the OPAC for a given item. Note: A circulating status is any status/location row that has a Status Treatment defined as "available" or "unavailable".	The table will be reconfigured for the chosen options.

Table row options:

- To copy the configuration for this item type and paste the settings to another item type for your institution, click **copy to** and select an option from the drop-down list.
- To add rows, click either the **add 1 row** or **add 10 rows** buttons.
- To delete rows, click the check box next to the row you would like to remove, then click **delete selected row(s)**.

Using Local Holdings Records (LHRs) for Serial Information

When the LHR option is selected, the following information from an LHR is displayed in WorldCat Local:

- Online links (856)
- Summary holdings data
- Call number (852 \$k, h, i, m – in this order)

When the LHR is not used or not found, WorldCat Local searches the local OPAC for availability information. To display LHRs for serial, article and e-serial information, check the box under the **Serial** tab at the bottom of the screen. Then complete the **Holdings Code Translation Table**.

Click [here](#) for information about loading Local Holdings Records.

When you are finished, click **Cancel** to start over, or **Save Changes** to save and continue.

Holding Codes Translation Table (WorldCat Local only)

Use this screen to customize your OCLC Holding Code Location information.

When OCLC retrieves Local Holding Records (LHRs) for an item, we will display the "Location" of the item in the availability area in your worldcat.org. If you would like to display a user-friendly location name instead of a Holding Code from the LHR, you can customize the display.

Information on this screen is only used if you have selected to use Local Holdings Records.

Holding Codes Translation Table

Please list Holding Codes with the location that you want displayed for the code, by entering the Holding Symbol, four-digit Holding Code and the location name. If you do not know your holding library codes, send an e-mail to profiling@oclc.org.

Include the following:

- Contact name
- E-mail address
- Phone number
- Library's name
- OCLC institution symbol

If you are adding a new holding library code, also include the following:

- The new four-character symbol
- The name/description

Table row options:

- To add rows, click either the **add 1 row** or **add 10 rows** buttons.
- To delete rows, click the check box next to the row you would like to remove, then click **delete selected row(s)**.
- You can change the data in the table by typing directly in the table cells.

When you are finished, click **Cancel** to start over, or **Save Changes** to save and continue.

Support

E-mail: support@oclc.org

Telephone: 1-800-848-5800 (USA) or
+1-614-793-8682

(7:00 am to 9:00 pm, US Eastern time,
Monday–Friday)

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