

# OCLC Service Configuration Guide



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# Introduction

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OCLC Service Configuration uses WorldCat account information to configure OCLC products and services. You can use this service to:

- Update your banner, custom links and display settings.
- Set the default sort order of your search results.
- Edit your local relevancy groups.
- Specify the OpenURL resolvers that will display.
- Customize your Place Hold buttons (WorldCat Local only).
- Define status and fulfillment-specific discovery and delivery policies (WorldCat Local only).
- Select databases that your users can search via Advanced Search.
- Supply a feedback e-mail address, and describe the level of system support you provide.

## Logging on

To review current settings and make modifications to address your library's preferences, log on to OCLC Service Configuration at <http://worldcat.org/config/>.

Log on using your user name and password.

**Note:** Passwords are case-sensitive.

### If you have a WorldCat account

You can use your WorldCat account ("My WorldCat" account on WorldCat.org, "My Account" on WebJunction®, WorldCat Registry™ account, or an OCLC Online Service Center account) to access OCLC Service Configuration.

1. Click [here](#) to search for an existing account.
2. Type a WorldCat user name, and click **Search**.
3. If the account exists, the Confirm your password screen appears. Type your password and click **Confirm**.
4. If the account does not exist, you will be asked to [Create an account](#).
5. The [account settings](#) screen appears. Follow the steps under [Your account](#) to add an institution to configure.

### If you do not have an account

You can create a WorldCat account that also allows access to other products such as WorldCat.org, WebJunction®, WorldCat Registry™, and the OCLC Online Service Center.

### To create an account:

Step	Action	Result
1	Click the <b>Create an account</b> button on the sign in screen.	The Create an account screen appears.
2	Choose a WorldCat user name, password, and type your first and last names, and e-mail address.	
3	Click <b>Create an account</b> .	The account settings screen appears. Follow the steps under <a href="#">Your account</a> to add an institution to configure.

## Your account

### Account settings

After you log on, you may click **Settings** to verify your account settings. Your name, e-mail address and password are listed. If you need to change your password, click **Change Password**.

### To add an institution to configure:

If you have not yet added institutions that you are authorized to configure, you can do that after logging on.

Step	Action	Result
1	Click <b>Settings</b> from any screen.	The account settings screen appears.
2	Click <b>Authorize me for an Institution</b> at the bottom of the screen, or <b>Authorize Institutions</b> from the left side of the screen.	The Add institution to configure screen appears.
3	Click either the <b>FirstSearch</b> or <b>NetLibrary</b> buttons.	
4	Type your library's FirstSearch or NetLibrary authorization/username and administrative password. <b>Note:</b> You must use a FirstSearch or NetLibrary authorization and administrative password associated with that FirstSearch account. If you manage an account for a service other than FirstSearch or NetLibrary, contact OCLC Order Services at <a href="mailto:orders@oclc.org">orders@oclc.org</a> .	
5	Click <b>Add Institution</b> .	If accepted, a confirmation message appears. The new institution will be available for configuration in a few business hours.
6	Click <b>Configure Products</b> to return to the OCLC Service Configuration modules.	

# User Interface Options

Use this screen to update your banner, custom links and display settings. Indicate if and where you would like to change the default settings. Guidelines for formatting are provided where necessary.

## Choose your WorldCat.org URL



If the World Cat Local URL and Institution Name are acceptable as is, go on to [Customize the banner \(optional\)](#).

### To change the WorldCat.org URL:

Step	Action	Result
1	Type the desired URL in the WorldCat URL field. <b>Note:</b> Changing this URL will impact any OCLC service you subscribe to on the Worldcat.org platform. Please consult with any other potentially impacted library staff before changing this.	
2	Click <b>check availability</b> to see if the URL is already being used.	A confirmation message appears to tell you if the name is available.

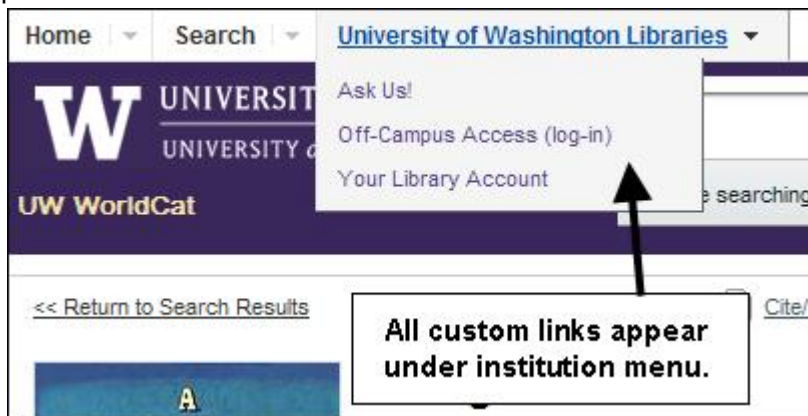
## Customize the banner (optional)

If you would like to change the banner at the top of your WorldCat.org screen, please follow the steps below.

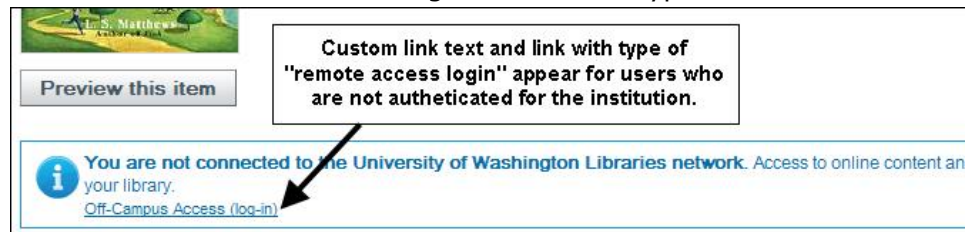
<p><b>Pick a color for the banner</b></p>	<p>Type the hex value in the field provided (a hex color value is a six-digit code that browsers can interpret and render into a desired color), or use the color picker to find a hex value.</p> 
<p><b>Logo image URL</b></p>	<p>If your WorldCat.org currently does not have a logo image, or if you would like to replace the current logo image, please provide a URL to an image of your institution's logo. The URL must begin with "http://" and be no longer than 255 characters. The logo image also cannot exceed 80 pixels in height and 275 pixels in width. <b>Note:</b> Images larger than this will automatically be resized.</p> 
<p><b>Alt-text for the logo</b></p>	<p>Type text that will appear when the cursor hovers over the logo.</p>
<p><b>Home page URL</b></p>	<p>Type the URL for the page where the user is sent when they click the logo image.</p>
<p><b>Text to appear to the right of the logo image</b></p>	<p>You can also display text next to, or in place of, your logo (40 character limit).</p>

**Custom Links**  
**Choose up to 7 custom links to appear in the banner**

You can create up to seven custom links that will display on your WorldCat Local screens. Please provide the URLs, link type and accompanying text for up to seven custom Web links (e.g., links leading to your library home page, Ask a Librarian, or the patron account page). These links should be listed in the order you want them to appear. There is a 25 character limit on the text for each link.



**Note:** If you wish to allow remote access outside your IP address, one of your custom links must be to your remote access page, and you must choose "remote access login" as the link type.



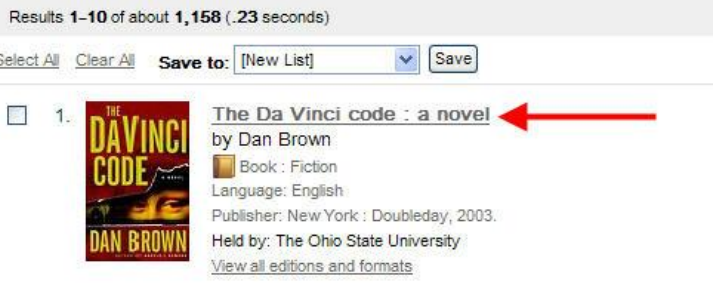

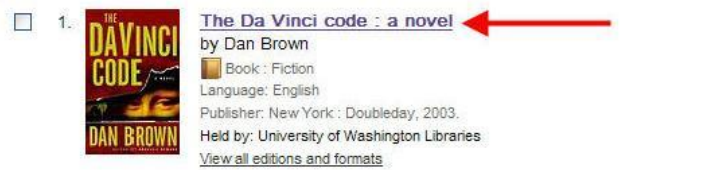


**Color of links and text in the banner**

To customize the color of banner links and text, type a hex value in the field provided (must be 6 characters), or use the color picker to find a hex value.

## Customize links and buttons (optional)

Choose colors to display throughout WorldCat.org. Type the hex value in the field provided (must be six characters), or use the color picker to find a hex value.

Custom Color	Hex Value	Example
<b>Search and fulfillment buttons</b>	(example: 999999)	
<b>Search box</b>	(example: EEEEE)	
<b>Unvisited Links</b>	(example: 333333)	
<b>Hover Links</b>	(example: CC0000)	
<b>Visited Links</b>	(example: 5A458D)	

## General display settings

### Display buying options?

Buy It is an optional feature that provides an additional delivery method for your users. Turning on the **Buy it** link allows your patrons the option to purchase titles that are available via Amazon.com, Barnes & Noble, Better World Books, Baker & Taylor, and British Library. The **Buy it** link is determined by ISBN.

### Display Syndetics data?

Use this feature to hide or show evaluative content elements from Syndetic Solutions within WorldCat Local. The following types of data will display (when available):

- Cover art
- Reviews from Library Journal
- Reviews from Publishers Weekly
- First Chapters
- Descriptions
- Table of Contents

**Note:** This content is part of a limited time trial for WorldCat Local subscribers in North, Central and South America, and the Caribbean until June 30, 2010 at no additional charge. Please see <http://www.oclc.org/worldcatlocal/overview/syndetic/default.htm> for complete details.

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

# Search Results and Relevancy Ranking

Use this screen to set the default sort order of your search results, and edit your local relevancy group. When the sort order is set to "Relevancy and Location," the search results will display based on the levels of relevancy configured here. By default, WorldCat Local displays results for your institution or institutions first, followed by Libraries Worldwide.

## OCLC symbols that represent your institution (1<sup>st</sup> Level of Relevancy)

Items held by your OCLC institution symbols will be sorted first. A patron searching on your WorldCat.org will be affiliated with institutions at this level. The libraries represented by these symbols must share a catalog in order to return holdings and availability.

<b>OCLC Symbols</b>	Enter OCLC symbols separated by commas. Click <b>Find OCLC institution symbols</b> to find an OCLC participating library or its symbol. <b>Note:</b> If any changes are made to your OCLC symbols, items held by your library will temporarily not be displayed in WorldCat.org until the next business day (approximately 9 a.m. US Eastern time). This also applies to holdings for your original symbol.
<b>Display name</b>	This name will appear on the "Held by" line on the search results, in scoping drop-downs, and in the detailed item view where availability is shown.

**Note:** Any changes to your institution information will not be reflected in WorldCat.org until the following business day (approximately 9 a.m. US Eastern time). Items held by your library will temporarily not be displayed until the next business day.

## 2<sup>nd</sup>/3<sup>rd</sup> Level of Relevancy (optional)

In your WorldCat.org, you may give users the option to limit results to items held at any relevancy level configured in the 1<sup>st</sup> Level of Relevancy using the scoping options. If a different scope hasn't been selected by a user, WorldCat.org will limit results to items held by the configured [default scoping level](#).

You may choose whether or not to allow users to limit their search results to items held by your library by checking or not checking the check box.

## Default Scoping Level

Scoping gives users the ability to limit results to items held by your institution, or items held by your institution and those held by Libraries Worldwide. Choose the default scoping level you prefer from the drop-down list. The user has the option of overriding this setting.

Libraries not using WorldCat Local have the option to turn off scoping entirely.

## Default sort on search results

You may define how search results are sorted by default when initially displayed. A user may change this setting to view other sort options, but every time a search result is initially displayed, the default sort setting will always be selected. Choose your default sort level from the drop-down list.

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

# OpenURL Resolvers

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

## 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™](#).

<b>Which Full Text Resolver should display?</b>	Choose which level of resolver you wish to display from the drop-down list.
<b>Button or Link Label</b>	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.
<b>Configure the Full Text OpenURL Resolver</b>	Choose a Full Text OpenURL Resolver from the OpenURL Resolvers you have already registered with OCLC. Click <b>View registered OpenURL Resolvers</b> to go to your OpenURL Resolvers list in the <a href="#">WorldCat Registry™</a> .
<b>For items held/not held by...</b>	Choose the option you prefer for when you want to display full text to your users at the local, group and worldwide levels. See below for more information on <a href="#">Item Types</a> .

Item types listed are described below:

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

## Resource Sharing OpenURLs (optional)—if available

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 (WCRS).

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 in WCRS.

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

<b>Button or Link Label</b>	If you would like to change the label, type the text you would like to use for your resource sharing button. For best display, keep this label under 40 characters. Click the check box to open the link in a new window when users click the button.
<b>Configure the ILLiad OpenURL Resolver</b>	Choose a resource sharing OpenURL Resolver from the OpenURL Resolvers you have already registered with OCLC. Click <b>View registered OpenURL Resolvers</b> to go to your OpenURL Resolvers list in the <a href="#">WorldCat Registry™</a> .
<b>For items held/not held by...</b>	Choose the option you prefer for when you want to display the resource sharing option to your users at the local, group and worldwide levels. <a href="#">Click here</a> for more information on Item Types. <b>Note:</b> WorldCat Navigator member libraries please contact OCLC to make changes to these OpenURL Resolver Resource Sharing settings. <b>OCLC support:</b> Telephone +1-614-764-6000, ext. 3510 or 1-800-848-5800 (USA) Fax +1-614-764-2694 E-mail <a href="mailto:support@oclc.org">support@oclc.org</a>

**Note:** Circulation data is defined in the [OPAC Status, Circulation and Lending Policies](#) module.

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

## Place Hold/Request Buttons (WorldCat Local only)

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

### Place Hold/Request button

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

<b>Button Label</b>	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.
<b>For items owned by...</b>	Choose the option you prefer for when you want to display the button to your users. <a href="#">Click here</a> for more information on item types.

If your institution is part of a consortium, the same options listed above are also shown for items owned by the consortium.

**Note:** Circulation data is defined in the [OPAC Status, Circulation and Lending Policies](#) module.

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

## OPAC Status, Circulation, and Lending Policies (WorldCat Local only)

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:

<b>Select your ILS Vendor</b>	Your ILS Vendor is listed.
<b>Select your ILS Product/Version</b>	Your ILS Product/Version is listed.
<b>How should WorldCat Local get item information?</b>	Shows your selection whether you want OCLC to "scrape" the information from the OPAC, or use Z39.50.
<b>Enter the URL used to search for items in the catalog by OCLC#</b>	Enter the URL for your catalog. For example: <a href="http://olc1.ohiolink.edu/search/o77496353">http://olc1.ohiolink.edu/search/o77496353</a> 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.
<b>Would you like to treat some item types as a different kind of item?</b>	Choose whether or not you want to use default WorldCat Local <a href="#">item types</a> . If you want to treat some item types as a different item, provide that information in the table. <b>Note:</b> 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. 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)**.

**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
<b>OPAC Status</b>	Item status that WorldCat Local retrieves from your OPAC (e.g., In Process, On Shelf, etc.)
<b>Location</b>	Item shelving location that WorldCat Local retrieves from your OPAC (e.g., Main Stacks, Reserves, etc.)
<b>Status Treatment</b>	Choose whether OPAC Status is available or unavailable. This also controls the availability messaging for items with this OPAC status.
<b>Online Links</b>	Choose whether to display any Online OPAC links that are found in your OPAC (e.g. 856 links) for items with this OPAC Status and Location combination.
<b>Allow Place Hold</b>	Choose whether to display the <b>Place Hold</b> button for items with this OPAC status and Location combination.
<b>FullText OpenURL</b>	Choose whether to display the Full-text OpenURL Resolver for items with this OPAC Status and Location combination.
<b>ILL OpenURL</b>	Choose whether to display the ILL OpenURL Resolver for items with this OPAC Status and Location combination.

## 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](#).

For information about loading Local Holdings Records, please see: <http://www.oclc.org/batchprocessing/options/holdings/localdatarecords/>.

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

## Holding Codes Translation Table (WorldCat Local only)

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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. For information about loading Local Holdings Records, please see:

<http://www.oclc.org/batchprocessing/options/holdings/localdatarecords/>.

### 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.

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)**.

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

# Licensed Content and Databases

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Use this screen to select databases that your users can search.

## Select Databases that a user can search in your WorldCat.org

Users will be able to search any of the selected databases by using Advanced Search in xxx.worldcat.org. If no databases are selected, WorldCat.org will automatically be the database a user can search. If no databases are selected yet, a message appears with a link to add databases.

**Searchable databases on xxx.worldcat.org:** Selected databases appear in the list.

### To change your settings:

Step	Action	Result
1	Click <b>add/remove databases</b> to see a list of available databases.	The Select database to search screen displays.
2	Click the check box next to each database to be included. <b>Note:</b> If your institution does not have an unlimited subscription to a database, a warning message will appear. If you would like to continue and make this database searchable, enter your authorization and password and click <b>Continue</b> . If you click <b>Cancel</b> , the database will not be added. <b>WorldCat Local libraries only:</b> If you wish to select non-OCLC licensed databases, you may select those but will be asked to provide a username and password for each. If you are adding a database that doesn't require a credential, leave the username and password blank.	The database name appears in the right column under <b>Selected Databases</b> .
3	Click <b>Save</b> when you are finished, or <b>Cancel</b> to start over.	You are returned to the Licensed Content and Databases screen.

## Organize your databases (optional)

You can create, name, and modify custom groups of databases to assist users in selecting the appropriate resources to search. A database may appear in more than one group. In order for a database to appear in a group, you must have selected it to appear on xxx.worldcat.org in the [Select Databases](#) section.

**Note:** You must have at least two databases selected to create a group. If no groups have been created, a message will display.

### Groups

If you have two or more databases selected, you may create a new group.

#### To create a group:

Step	Action	Result
1	Click <b>Create a new database group</b> .	The <b>Group Name</b> and <b>Databases in this group</b> fields appear. All selected databases appear in the drop-down menu.
2	Type a <b>Group Name</b> in the space provided.	A confirmation message appears to tell you if the name is available.
3	Click the check box next to each database to be included.	
4	Click <b>save group</b> .	The new group information appears.

If you have created groups, you may edit a group from this screen.

#### To edit a group:

Step	Action	Result
1	Click <b>edit group</b> .	The <b>Group Name</b> and <b>Databases in this group</b> fields become editable.
2	Change the <b>Group Name</b> , if desired.	
3	Click the check box next to each database to be included or excluded.	
4	Click <b>save group</b> , or <b>cancel changes</b> to start over.	The new group information appears.

**Group display order:** If you have two or more groups, you can define a display order. Highlight a group name from the list and use the arrows to order the custom groups based on how you would like them displayed to the user. Users will be able to see all databases ordered alphabetically below the groups.

**Default database/group:** Choose the default database from the drop-down list.

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

# ILS Support and Maintenance

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Use this screen to supply a feedback e-mail address, and describe the level of system support you provide (if available).

## User Support

WorldCat.org will forward any patron feedback sent through the WorldCat.org Feedback form to the institution purchasing this product. Librarian feedback will be sent to [OCLC Customer Support](#).

**Forward feedback to this email:** Provide an email address for feedback to your institution.

## System Support and Maintenance—if available

<b>Select your time zone</b>	Choose a time zone from the drop-down list.
<b>Regular support hours</b>	Choose 24 x 7 or click <b>Add another regular support hours timeframe</b> to add your hours.
<b>After-hours support</b>	Click <b>Add another after-hours support timeframe</b> to add your hours.
<b>Do you have a standard, scheduled downtime for your system?</b>	Click <b>Add another scheduled downtime timeframe</b> to add your hours.
<b>Do you have a service unavailable page during downtime?</b>	Supply the URL for your service unavailable Web page, if applicable. For example, <a href="http://www.lib.edu/nopagefound.html">http://www.lib.edu/nopagefound.html</a> .
<b>Do you have a webpage for status updates during downtime?</b>	Supply the URL for your status updates Web page, if applicable. For example, <a href="http://www.lib.edu/nopagefound.html">http://www.lib.edu/nopagefound.html</a> .
<b>Search URL that OCLC may use to test to the OPAC</b>	Supply the URL that OCLC may use to test your OPAC. Must include a valid OCLC search (for example, <a href="http://www.lib.edu/search/o70176934">http://www.lib.edu/search/o70176934</a> ).
<b>Additional notes</b>	Any additional information you wish to supply.

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