



Service Configuration Checklist

Introduction

This checklist can be used as a guide to thinking through and gathering information for many of the branding, policy, and workflow decisions that are represented by questions in [OCLC Service Configuration](#).

Branding

What should your WorldCat Local look like?

- What is the URL for your library's WorldCat Local?
- What are the URLs for your logo and links to other institution web pages?
- What colors do you want for your banner, buttons, and links?
- Do you want the **Buy-It** Link to display?
- Do you want to customize labels for availability information for your institution?
- Do you want to customize the authentication prompt for your users?
- Do you have an e-mail address for users to submit feedback about their WorldCat Local experience?

Relevancy

What relevancy groups should WorldCat Local use to return search results?

- Do you have more than one library on your campus? Do they all share the same catalog?
- If they do share a catalog, would you like to return results for items held by all the campus libraries as your first set of results? If so, you'll need those libraries' OCLC symbols, and a name for the relevancy group.
- Do you want the initial search to display results from all relevancy groups, or just from selected groups?
- If you subscribe to WorldCat Local, do you want to create up to two additional relevancy groups, using libraries in your area, or in a consortium of which you are a member? If so, you'll need those libraries' OCLC symbols, and a name for each additional relevancy group.

Library Policies

In general, when should your users be able to place holds, see online links, and request items via interlibrary loan?

- Would you like searchers to be able to place a hold or request an item? When?
- Would you like searchers to see links to online content? When should these links display?
- When should the **ILL** button appear? What is the URL for your resource sharing OpenURL resolver?
- If you have local and/or consortial OpenURL resolvers, which one(s) should display? What is the URL for your OpenURL resolver?
- Does your OPAC display some items in a manner that is consistent with a format that differs from the item's actual format? (For example, a serial published once a year has a display consistent with your monograph display.) If so, specify the MARC field, subfield and value in the OCLC Master record that will alert OCLC to look for the actual display format in your OPAC.

Fulfillment Decisions

When should users see links to online content, and buttons for full-text, place hold, and ILL?

- What are your OPAC's status and location messages?
- Will the status and fulfillment options depend on the format of an item, or are they the same regardless of format?
- Based on an item's format, status and location, when should OPAC links, and buttons allowing users to place holds, link to your OpenURL Resolver, and request items via interlibrary loan appear?

Optional Content

Do you want to display enhanced content and licensed content to your users?

- If you subscribe to Syndetic Solutions Enrichment Content, do you want to hide or show the content?
- If you subscribe to additional databases, do you want to add and organize them for your users?

WorldCat Local: Customization Form Checklist

- Do you want to display full text or electronic links on your Detailed Record or Search Results pages?

Support

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