WorldCat Discovery Configuration

Patron-facing Features

In the OCLC Service Configuration, you can configure display and search settings, select vocabularies for related searches, customize search filters, configure the fulfillment links and create a custom search box to host on your library website, in library guides or other locations. This document provides brief information with links to documentation and online tutorials to support this configuration work.

Logon to the OCLC Service Configuration here: https://worldcat.org/config

Establish search settings:

Libraries can customize options for controlling the display of search results and what users may be able to do to customize the view of their results in WorldCat Discovery.

Default grouping

This feature enables a library to control how search results are grouped by default when initially displayed. There are two options:

- Group related editions for search results scoped to <Your Level 1, Level 2, and 3 groups> by default* [if no other levels are defined, Level 1 is your institution]
- Group related editions for search results scoped to libraries worldwide by default.

When these settings are enabled users will continue to see search results grouped by work.

When these settings are disabled users will see a new view where search results are grouped by edition. Edition grouping brings records together that have the same:

- Work ID (title, author, format)
- Language of publication
- Sub-format (where applicable, not all records have sub-format)
- Year of publication
- Publisher (first entry)

Recommended action: Enable group related editions by default for each level unless your institution has unique workflows that require ungrouping of editions.
In the next section, you may control the option for your users to group or ungroup variant records in search results and Editions and Formats. Variant records are records for the same edition but in a different language of cataloging or a duplicate record that has not yet been merged. If these controls do not display, variant records are grouped by default.

If enabled, you can select to Group variant records by default. To see a flat view, users must disable the Group variant records filter on search results.

If disabled, the Group variant records control does not display. In this case, search results will be grouped by variant record when Group related editions is disabled in WorldCat Discovery interface.

**Recommended action:** Disable the default display of group variant records unless your library has unique workflows that require ungrouped variant records in search results.

To enable availability from the edition group, select one of these options:

- **Display availability from the edition group:** Availability displays for each record in the edition cluster on the representative record. **For WMS institutions:** Enable edition availability.

- **Display availability from the OCLC number:** Availability displays for the OCLC number of the representative record. [default value]

Check this link for more information about the representative record for grouped search results and availability display for grouped records in Explore Editions and Formats and search results in the WorldCat Discovery interface.
Set sort order

You can determine a default sort order that would be appropriate for most of your library’s patrons and staff. This sort order can be changed based on individual searching goals.

There are eight (8) sort options including Author (A to Z), Title (A to Z), Date (Oldest), Date (Newest), or Most widely held. Three sort orders that are frequently considered include:

**LIBRARY** is the default selection. This shows items available in your library’s collection first, matching terms in title, author, date, and other record details.

**BEST MATCH** shows matched terms in title, author, and date. Recommended for monographic searching. Individual library holdings are weighted lower.

**RECENTY** shows matched terms in title, author, and date, emphasizing recent items. Recommended for article searching.

More information about these options can be found under relevancy and scoping [here](#).

Search expansion settings

Library staff can enable searching across authority files to find relevant search terms, even when using related, variant, or deprecated search terms.

If the search terms match a heading in the 1xx and/or 4xx fields of an authority record, the authorized term and any related terms are added to the original search to expand the search.

Enable the expansion then select authority files to include in this process.
In WorldCat Discovery, Include related terms displays terms added to these search results.

A keyword search returns results from the keyword index to ensure matching phrases from uncontrolled vocabularies appear as well.

Search expansions will search as keywords over the appropriate indexes.

**Customize search filters and settings**

Under Search filters settings, you can set an option to either retain filters for subsequent searches by default or allow the user to control whether to retain filters on a case by case basis.

- Keep filter selections for subsequent searches by default
- Display control to limit by Open Access

Once the filter selections and Open Access control are determined, review the search filters to select which ones to display and in what order.

These settings will allow you to:

- Choose the display order of filters.
- Choose to show or hide each filter.
- Choose to expand or collapse the content of each filter by default.
- Choose from a selection of display labels for each filter type.

These filters display on the search results page. Display label changes also show in the “editions and formats” section and on the advanced search page.

Look for more information about these options under Search Filter Settings [here](#).
Display Editions & Formats and alternate formats on search results

This section allows you to determine whether to display other Editions & formats as well as other locally held format types for the same title represented by the citation. Your library users and staff will then easily be able to locate these alternate editions in other formats.

Go to WorldCat Discovery and WorldCat Local > Search settings > Search Results Settings. Enable these buttons here.

<table>
<thead>
<tr>
<th>Search Results Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select which features appear on your WorldCat Discovery search results:</td>
</tr>
<tr>
<td>- Display Editions &amp; Formats links on search results</td>
</tr>
<tr>
<td>- Display alternate formats on search results</td>
</tr>
</tbody>
</table>

Libraries that use WorldShare Management Services (WMS) or those who have WorldCat Discovery with real-time availability, can enable the display of alternate formats on search results. Go to WorldCat Discovery and WorldCat Local > OPAC Statuses, Locations and Circulation Policies > Item Availability from OPAC > WorldCat Discovery and WorldCat Local.

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WorldCat Discovery Only
Display Item Availability on search results, course reserves and browse the shelf (for WMS only)
- Automatically (10 results at a time)
- On Demand (1 result at a time)
- Do Not Display

Display physical item availability on electronic item search results
Does not apply to course reserves
- Display physical item availability on E-serials
- Display physical item availability on Mass Digitized Content
- Display physical item availability on All Other Electronic Content
Configure User Interface Options

Set up a logo and configure custom links

Under WorldCat Discovery and WorldCat Local, open User Interface Options. Here you can set a WorldCat.org redirect to your WorldCat Discovery site, add a logo image, and set up custom links to your library’s chat service, remote sign-in and other sites.

Expand the logo image panel. Enter the URL for your library’s image in https format. Add alternative text to display when your users hover over the image and a link that directs them to your library’s website or other location. Here are a few examples:

Home page URL: [https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery](https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery)
- Alternative text: WorldCat Discovery documentation

Or
- Alternative text: Visit the library page
Add custom links to display under resources in WorldCat Discovery

Under Custom links, you can set up to 7 links to your library’s chat service, enable remote sign-in, a link to your eResources A to Z list and links to other sites of interest to your library’s users and staff.

Custom link 1 is the best location for the chat widget. Once configured, the link will appear as a floating button in the lower right of every screen in WorldCat Discovery. OCLC requires the use of a secure https:// protocol for the chat links that are entered here.

- Go to Custom Link 1 and select “library contact information” from the list presented.
- If you use Question Point, enter the Question Point User ID in the space provided. This service uses a secure https:// protocol.
- For a different chat service, answer No to Question Point, then enter chat code and display text in the spaces provided.
- A Test URL link is present to verify the information before saving it.

Custom link 3 is the best location for a remote sign-in option. Here you can add your proxy information and the display text. This link appears under Resources in the upper left of the WorldCat Discovery banner and on the lower part of the home page. This proxy information enables library users to be authenticated to use your licensed e-content and submit interlibrary loan requests for items not available in your library collection when they are working outside your library’s IP address ranges.

When a resource is selected that needs authentication, a box that prompts them to sign in will appear.

- Go to Custom Link 3 and select “remote access login” from the list presented.
- Enter the proxy landing page URL in the space provided.
- Check the box next to "Append current URL to the end of this link."
- Add display text for the link.

When finished, click Save Changes in the lower right of the screen. This stores your settings here so they will display in WorldCat Discovery.

Display links to other resources

Use another link to display an A - Z list of eResources. If your library uses the WorldCat Knowledge Base, you can locate this link under A – Z list and OCLC link resolver on the left navigation bar.

- To obtain this link resolver base URL, open A-Z list and OCLC link resolver.
- Copy OCLC link resolver base URL up to “atoztitles”. Do not copy /link at the end of the URL.
- Return to User interface options and open the Custom links panel.
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- Select Custom Link 2 and select “other” from the link type list presented.
- In the URL space, paste the link resolver URL.
- Add text to display under Resources that explains this link.

When finished, click Save Changes in the lower right of the screen.

Configure other links to direct your users to support sites or other resources, such as:
- Book lists
- Special collections
- Subject guides
- Suggest a purchase.

For each link, provide the URL, and display text.

- Select the link type from the list presented. Use Other if your link does not fit specific suggestions.
- In the URL space, add the URL for the resource.
- Add text to display under Resources that explains this link.
- Test the link to make sure it works as expected.
- When the link works as expected, click Save Changes to store the settings.

Add a fulfillment button

Configure a fulfillment button to your library’s interlibrary loan service, such as WorldShare ILL, Tipasa or ILLiad. This enables your library’s users and staff to place requests for items not held in your library collection. There are three basic settings needed for WorldShare ILL,
  - Configure your library’s IP addresses.
  - Configure your library’s Patron request form under WorldShare ILL.
  - Configure the resource sharing button text and determine under what conditions the button will display either Always, Never or based on material formats.

- Go to WorldCat Discovery and WorldCat Local > Place hold / Request button.
- Open the panel, Resource sharing (any service)
- Follow the screen instructions to enter button display text and select the resource sharing service used at your library. This may be WCRS/WS ILL, or OpenURL 1.0 (for Tipasa or ILLiad).

- Tutorial: Customize your ILL request button Documentation: Customize your ILL request button
Use the search box generator to create a search box for your Web site

The search box generator makes it easy for your library to build a search box HTML snippet to host on your library homepages, online library guides, and other sites. These search boxes can be embedded in any webpage to meet users where they often start their research, and they can be customized to include your library’s colors and local text.

Go to WorldCat Discovery and WorldCat Local > Search Box Generator to get started.

Select these options:

1. Select databases for search box (if different from the default selections)
2. Select material formats for search tabs and set the format display order
3. Select the default for search results such as, related editions, link to Advanced search page, library scope, search index and sort order.
   NOTE: if no selection is made, the default values will be used.
4. Choose colors and display text.

Save custom search box configurations and test your choices by entering a search in the preview.

If the search box works as expected, copy the code to Clipboard then add the search box to your site.

Search Box Generator

Search Box Preview and Code

Select Databases for Search Box
Create Search Tabs
Select Defaults for Search Results
Choose Colors and Text for Search Box

Support Resources:

WorldCat Discovery documentation has details about configuration, searching and other features.

Visit the Community Center to engage in discussions, learn about updates, submit enhancement requests or review those suggested by others.

OCLC Customer Support: https://oc.lc/support-regions

Email: support@oclc.org Phone: 800.848.5800 (US)

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Test your knowledge

Use these questions to reinforce your understanding of the topics covered in this session.

1. In the Service Configuration, (check all that apply)
   a. I can set up remote sign-in capabilities for my library users.
   b. I can order a pizza.
   c. I can configure how the filters display on search results.
   d. I can create the code for a custom search box to add to my library’s website.

2. The sort order that retrieves known items that are good matches on visible fields with library holdings weighted lower is called:
   a. Recency.
   b. Library.
   c. Most widely held.
   d. Best match.

3. The Audience filter can be applied to search results from which databases: (check all that apply)
   a. WorldCat
   b. Academic Video Online and Audio Drama databases
   c. Any databases that are selected to search.
   d. WorldCat.org
   e. Only databases with video or audio content

4. Custom link 1 is the best location for the:
   a. Remote sign-in link
   b. Documentation link
   c. Chat widget link
   d. A to Z resources link

5. The Resource Sharing fulfillment button is used with WorldShare ILL only.
   a. TRUE
   b. FALSE

6. What components are needed to set up WorldShare ILL? (check all that apply)
   a. Configure the library’s IP addresses.
   b. Configure the library’s physical address.
   c. Set your order form.
   d. Set the button text and type of ILL button configuration.

7. **User Interface Options** includes choices to:
   a. set my library’s logo and banner colors to display in WorldCat Discovery.
   b. set my library’s IP addresses.
   c. set up a fulfillment link to my resource sharing service.
   d. set up the ability to send text messages to library staff.
8. In the Search settings,
   a. I can set up a chat widget.
   b. I can set the sort order for search results and the default value to group or ungroup related editions.
   c. I can set up the ability to save searches in WorldCat Discovery.
   d. I can set up a customized message to display in my WorldCat Discovery banner.

9. The optimal settings to display editions and formats and variant records for most library users is to:
   a. Turn ON control to group editions and formats and turn OFF the control to display variant records.
   b. Turn OFF control to group editions and formats so that a flat list of results always displays.
   c. Turn ON control to group editions and formats and turn ON the ability to control display of variant records.
   d. Turn OFF both the ability to group editions and formats and the ability to control display of variant records.

10. The purpose of Search expansion settings is to:
   a. enable the display of search results that are from my library collection and from libraries worldwide.
   b. enable searches in selected authority files to find additional relevant search terms related to the initial search words used.
   c. expand searching to automatically include other databases with the default database.
   d. extend searching to include options such as Full Text, Peer Reviewed and Open access.

Check your answers on the next page
Answer Key

1. a, c, d.
2. d
3. a, d
4. c
5. b
6. a, c, d
7. a
8. b
9. a
10. b