WorldCat Discovery Configuration

Patron-facing Features

In the OCLC Service Configuration, you can set up links to full-text content, configure a patron ILL request button and form, direct patron feedback to your library and create a custom search box to host on your library homepages, library guides and other sites. 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](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.

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Default Grouping

Define how search results are grouped by default when initially displayed. A user may change these settings, but every time search results are initially displayed, the default options set here will always be selected.

- Group related editions for search results scoped to [Training Library by default]
- Group related editions for search results scoped to libraries worldwide by default
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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.

Define the default display of item availability for grouped records.
To enable availability from the edition group, select one of the options below:

- **Display availability from the edition group**: Availability displays for each record in the edition cluster on the representative record.
- **Display availability from the OCLC number**: Availability displays for the OCLC number of the representative record. [Current default value]

Recommended action: For WMS institutions: Enable edition availability.
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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 choose the authority files to be included in the searches.

In WorldCat Discovery, these results display

Customize search filters and settings

If search results are filtered, an option may be used to keep these filter selections for the next search. The default value is to turn off this option which means that selected search filters are discarded when new search terms are entered. This too may be controlled on a case by case basis on the search results screen in WorldCat Discovery. The ability to keep filters for subsequent searches can be set as the default value in the Service Configuration.

Under Search filters settings, you can select which search filters you want to display and the order of how these are displayed.
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These settings will allow you to:

- Choose the display order of facets, so that Format appears above Library, for example.
- Choose to show or hide each facet.
- Choose to expand or collapse the content of each facet by default.
- Choose from a selection of display labels for each facet 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 Settings here

Set default relevancy and scoping for search results

Verify that the sort order for search results is appropriate for most of your library’s patrons and staff. To begin, open WorldCat Discovery and WorldCat Local > Relevancy and Scoping.

LIBRARY is the default sort option. This option displays materials where your holdings are attached high in the result sets while matching terms in title, author, date and other record details.

BEST MATCH uses four weights applied in order of priority: Title, Author, Date, and Worldwide holdings. Individual library holdings are weighted lower in this option.

RECENCY places an emphasis on newer materials. It uses the same four weights applied in this order of priority: Date, Title, Author, Worldwide holdings.

More information about these options can be found under relevancy and scoping here.

Configure full text and open access links

Configure links to your e-content so your patrons and staff can easily locate and view these items. Go to WorldCat Discovery and WorldCat Local > Full text and open access links to get started.

- Use the WorldCat knowledge base to set up your licensed e-content collections. Access to WorldShare Collection Manager is part of a cataloging subscription.
- Go to Metadata Services > WorldShare Collection Manager for more information.

- Add links from master WorldCat records' 856 fields. These links come from content that is presumed to be open access based on the domain extension (i.e. ends in .edu or .gov) or on the source (i.e. Internet Archive). All the links are checked by default; review these and uncheck the boxes beside any link sources that you do not wish to display.

- Enable DOI full text links. DOIs will inform Access Online on search results, detailed records, and Course Reserves. DOIs are compared to Unpaywall data to ensure that only DOI’s leading to open access content display. If a DOI is not present in Unpaywall, then the Access Online button does not display, but the DOI appears in the Description of detailed records. DOIs display on both WorldCat and non-WorldCat records as a primary link when a matching Unpaywall DOI exists.
Direct your patron feedback to your library

Configure an email address where feedback from your library patrons can be directed. The feedback link, found in the lower right corner of WorldCat Discovery interface, displays a patron form. There are required fields to ensure that proper follow-up can be provided by your library staff. To receive a copy of all feedback for your library, click the check box ‘Send a copy of all emails to me’.

Library staff can use a version of this form with additional data elements to submit comments to OCLC. At the top of the form is some general information, a link to report bibliographic errors, and a link to WorldCat Discovery support documentation.

Report a broken link

Configure an email address where library patrons can report broken links. The report broken link can be found under Availability > Other links and on the A-Z list.

The form that displays asks for the patron’s name and email address, with a checkbox to request feedback so library staff can follow-up with a corrected link.

When patrons submit a “Report a Broken Link” in WorldCat Discovery or the A to Z list, a confirmation message confirms that the action was successful. To ensure institution-specific policies such as following up in a specific timeframe are displayed to these patrons, an institution-configured confirmation message can display.

OCLC receives the link metadata report but no patron information. Library staff can use a version of this form that removes the required fields and only sends an automated report to OCLC for analysis. There is no follow up with this action.

Start at WorldCat Discovery and WorldCat Local > ILS Support and Maintenance > User Support to set up email destinations for these forms and to customize the message.

Add a patron facing ILL request button

Configure the Patron Request Item button so patrons and staff will be able to place ILL requests for items not held in your library. Links may be set up for WorldShare Interlibrary Loan (WS ILL) or to an Open URL service such as ILLiad.

- Go to WorldCat Discovery and WorldCat Local > Place hold / Request button to get started.
- Tutorial: Customize your ILL request button Documentation: Customize your ILL request button
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Navigate to other locally - held formats on search results

To help patrons be able to access other formats available in your institution from a default edition that displays in search results, you can enable a feature to display a link for each unique format.

Go to WorldCat Discovery and WorldCat Local>User interface options>General Display Settings.

- Enable the button next to Display alternate formats in search results to turn on this display.
- The default setting is off. When enabled, this feature displays one of each locally-held format type that is not the same year as the representative record citation.
Display availability of physical items on electronic records

This feature is specifically for WMS and WorldCat Discovery libraries with real-time availability.

When your patron views an electronic item on grouped search results, WorldCat Discovery will show the physical availability of the most recent locally held edition. The statement indicates whether the physical edition is older or newer than the default edition. If the publication date of these items is the same as the default edition, or a date comparison cannot be determined, the physical availability will state the format of the most recent physical edition along with availability details.

Go to WorldCat Discovery and WorldCat Local > OPAC Statuses, Locations and Circulation Policies > Item Availability from OPAC > WorldCat Discovery and WorldCat Local.

Review your settings under: Display item availability on search results per bibliographic type:

- Enable Availability on brief results for monographs and serials
- Disable availability on brief results for e-serials and other electronic content

NOTE: If your library uses Local Holding Records for electronic resources, you can choose this new feature OR continue using current availability settings. If both options are enabled, duplicate availability information on brief results may display.
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**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.

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**Search Box Generator**

*Required fields are marked with an asterisk (*)*

Customize your external search box for WorldCat Discovery by using our generator to copy and paste into your institution’s website.

**Search Box Preview and Code**

Copy to Clipboard

**Select Databases for Search Box**

Create Search Tabs

Select Defaults for Search Results

Choose Colors and Text for Search Box

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Third party integrations = StackMap (a feature for WMS libraries)

StackMap is an indoor mapping solution and way-finding tool designed to help users physically locate items in your library physical spaces. Previously libraries could use StackMap through a Chrome browser extension, but now WorldShare Management (WMS) libraries can integrate StackMap within their WorldCat Discovery interface.

Go to Third-Party Integrations > StackMap to get started.

- For “Display StackMap in WMS/WorldCat Discovery” change Do not display to Display. This activates the other choices on this page.
- Enter the StackMap domain identifier specific to your library in the box provided.
- Select the holding code(s) that are part of your StackMap subscription.
- Select from the drop-down list, the display name for your StackMap link
  - Locate”, “Map It”, or “View Library Map”.
- Click Save to store your selections.

Once StackMap is enabled, WorldCat Discovery displays links to a library map on the search results page along with the availability statement. (Item availability on search results must also be configured to display StackMap links on search results.)

Click the link to view the map with options to zoom in/out, and print. The detailed shelf location including the call number displays on the map.
Integrate with LibKey Discovery to access PDF content and explore articles within journals (BrowZine)

Libraries with subscriptions to both WorldCat Discovery and Third Iron Complete or LibKey can configure a LibKey Discovery experience to provide their users with links to the full text PDF of an item when available through LibKey Discovery, and offer the ability to browse articles within the same journal and within the most recent issue of their journal.

To implement this feature, enter your library’s LibKey ID and Access Token in the BrowZine module. This integration will be available in both the WorldCat Discovery interface and the A - Z List. You can choose to display the integration in one or both places.

View PDF Functionality

When a search result for an article in WorldCat Discovery contains a DOI and LibKey Discovery returns a Full Text link, the link displays in Discovery as a “View PDF” button. When this feature is enabled, the “View PDF” button will display first if more than one link is present.

Information about this BrowZine integration can be found here:

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.

Contact OCLC Customer Support in your region.