Configure Discovery

Find a description of the elements of Discovery that can be configured. This page describes many of the elements of Discovery 3.0 that can be configured by each library.

Please contact your local Relais administrator to request any configuration changes.

Login

For libraries that do not authenticate patrons using institutional services such as LDAP and Shibboleth, it is possible to allow guest access to Discovery. When option is turned on, anyone can search the virtual union catalog. At the time the fulfillment options display and the patron is prompted to submit a request into Relais D2D then a login pop-up displays and once the correct credentials are entered and validated, the request is submitted.

Landing page

By default, the Simple Search displays as the landing page. If preferred, the Advanced Search can be configured as the landing page.

Advanced Search options

By default the following indexes display as part of the Advanced Search and in the following order:

- Keywords Anywhere
- Title
- Author
- Subject
- ISBN
- ISSN

Each library can determine which indexes to display by default, the names for the indexes and which order to use.

Results list

Number of records returned

By default the following two numbers display at the top of the results list:
• The number of records currently being displayed, e.g., 1 - 20 or 21 - 40
• The number of de-duplicated records retrieved

A third number indicating the total number of records retrieved can also be configured.

**Held by**

Each library can determine whether to display or hide the held by list of libraries that is displayed for each entry in the results list.

**Facets**

When displaying facets, each library can determine:

• Which facets to display
• The name of each facet, e.g., Medium instead of Format
• The order of display, for example:
  ◦ Format
  ◦ Date
  ◦ Subject
  ◦ Author
  ◦ Library

By default a maximum of 15 entries display for each facet. This number is configurable. Note that whatever number is configured it applies to all of the facets displayed. It is not possible to configure a different number for each of the facets.

**Fulfillment options**

**Consortium request**

For more information, see [Request from consortium](https://help.oclc.org/Resource_Sharing/Relais_D2D/Discovery/Configure_Discovery).

**If using Relais D2D for request management**

Each library can specify the following text and prompts:

<table>
<thead>
<tr>
<th>PROMPT</th>
<th>SAMPLE TEXT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message</td>
<td>Select a pickup location and click the Request button to order this item through the consortium</td>
</tr>
</tbody>
</table>
### Options to prompt for

- Pickup locations at the patron's library (provided as part of initial implementation/configuration)
- Volumes needed (optional)
- Notes (optional)
- Acknowledgement message (if included the Request button is not activated until the patron clicks to accept)

### If using ILLiad for request management

Each library can specify the following text and provide their own URL:

<table>
<thead>
<tr>
<th>PROMPT</th>
<th>SAMPLE TEXT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message</td>
<td>Click here to request via your consortium</td>
</tr>
<tr>
<td>Text for button</td>
<td>Request</td>
</tr>
<tr>
<td>Corresponding URL</td>
<td>link to local ILLiad system</td>
</tr>
</tbody>
</table>

### Locally available

For more information see [Locally available](#).

Each library can specify the following text and provide their own deep link URL:

<table>
<thead>
<tr>
<th>PROMPT</th>
<th>SAMPLE TEXT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message</td>
<td>The item is available in your local library</td>
</tr>
<tr>
<td>Text for button</td>
<td>View in your local library catalog</td>
</tr>
<tr>
<td>Corresponding URL</td>
<td>Deep link to your local catalog</td>
</tr>
</tbody>
</table>
ILL

If using Relais D2D for request management for ILL requests

There are two options on how to prompt the patron to submit an ILL request:

**Option 1:** Link to the Relais request form. Each library can specify the following text and provide their own url.

<table>
<thead>
<tr>
<th>PROMPT</th>
<th>SAMPLE TEXT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message</td>
<td>The consortium cannot supply this title at this time.</td>
</tr>
<tr>
<td>Text for button</td>
<td>Please click here to request through Interlibrary Loan.</td>
</tr>
<tr>
<td>Corresponding URL</td>
<td><em>link to Relais request forms</em></td>
</tr>
</tbody>
</table>

**Option 2:** Prompt the user to select a pickup location, notes etc

<table>
<thead>
<tr>
<th>PROMPT</th>
<th>SAMPLE TEXT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message</td>
<td>Select a pickup location and click the Request button to order this item via ILL.</td>
</tr>
<tr>
<td>Options to prompt for</td>
<td>• Pickup locations at the patron's library (provided as part of initial implementation/configuration)</td>
</tr>
<tr>
<td></td>
<td>• Volumes needed (optional)</td>
</tr>
<tr>
<td></td>
<td>• Notes (optional)</td>
</tr>
<tr>
<td></td>
<td>• Acknowledgement message (optional)</td>
</tr>
<tr>
<td>Text for button</td>
<td>Request</td>
</tr>
</tbody>
</table>

If using ILLiad for request management for ILL requests

<table>
<thead>
<tr>
<th>PROMPT</th>
<th>SAMPLE TEXT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message</td>
<td>The consortium cannot supply this title at this time.</td>
</tr>
<tr>
<td>Text for button</td>
<td>Please click here to request through Interlibrary Loan.</td>
</tr>
<tr>
<td>Corresponding URL</td>
<td><em>link to local ILLiad system</em></td>
</tr>
</tbody>
</table>
If no ILL option is offered

<table>
<thead>
<tr>
<th>PROMPT</th>
<th>SAMPLE TEXT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message</td>
<td>The consortium cannot supply this title at this time. Please contact local library staff for further assistance.</td>
</tr>
<tr>
<td>Text for button</td>
<td>None</td>
</tr>
</tbody>
</table>

**Pickup locations**

If using Relais D2D for managing requests, the patron is prompted to select the pickup location to use.

Each library can specify the order in which their library's pickup locations display is configurable.

In addition pickup locations that are no longer in use (either temporarily or permanently) can be hidden.

**Holdings grid**

See [Detailed holdings](https://help.oclc.org/Resource_Sharing/Relais_D2D/Discovery/Configure_Discovery) for more information.

A holdings grid is available for display below the fulfillment option for the title selected. This grid can include all the holdings retrieved for the title selected or only local holdings (if any are retrieved). Options for the holdings grid are:

- After selecting a title
  - Include the holdings grid – collapsed (default)
  - Include the holdings grid – expanded
  - Do not include the holdings grid
- When the holdings grid is displayed
  - Display the details for each library that holds the title selected (default)
  - Display the details only for titles held locally (if there are no local holdings then no grid displays)

The number of entries that display in the grid at one time is configurable, by default 5 entries display.

**No records retrieved**

After a search is entered and no results are found, the text and options that display are configurable by each library.

<table>
<thead>
<tr>
<th>TEXT</th>
</tr>
</thead>
<tbody>
<tr>
<td>No records were found when searching 'terms entered'. Please check your spelling or try with different search terms. If you have questions, contact your local library</td>
</tr>
</tbody>
</table>
staff or submit an ILL

This text can be configured, e.g., to include links to local contacts or additional documentation.

OPTIONS

• Whether to display a link to an ILL request form for a loan, along with the text to display and the link to use
• Whether to display a link to an ILL request form for a copy, along with the text to display and the link to use

Patrons name

By default the patron's name and surname (as retrieved via NCIP Lookup User or from the Relais patron record) are displayed in the upper right-hand corner of the various screens in Relais Discovery. Alternate configuration options are:

• Display surname only
• Hide both the first name and surname

My Account

By default, a link to My Account displays in the upper right-hand corner of the various screens in Relais Discovery. Alternate configuration options are:

• Change the label "My Account" to a local preference
• Hide the link to My Account
• Configure an alternate My Account link

Help

An optional link to Help can also be configured if documentation is provided by the library.

Confirmation message to patrons

By default the text of the confirmation message sent to the patron when a request is submitted is:

Subject: Your ILL Request: $RequestNumber
Message body:
The following request has been submitted to your ILL department at $TimePosted12 on $DatePosted
Request-Number: $RequestNumber
Title: $Title
Author/Editor: $Author
Note: $Note

If you have any problems or questions about this request please contact your ILL Office.

*This is an auto generated message.

Each library can modify the text of this message including what contact information to include.

**Logout/expiry**

By default when the patron logs out or the session expires when the patron is inactive a message displays to the patron.

**For logout:** Thank you for using D2D.

**For expiry:** Your session has expired, please login again. Thank you for using D2D.

Each library can configure this message or specify a link to which page the patron is directed for each of these situations.

Different pages can be configured for post logout and post expiry.

**GDPR privacy notice links**

By default links to GDPR privacy notices are hidden. Links can be configured to display on the login page and/or in the footer section of each page in Discovery.

Each library can configure their specific link and link text to which their patrons are directed.

**Request a configuration change**

To request changes to any of the above settings, please contact your local Relais D2D Administrator and indicate the additions, changes, deletions to be made.