Learn how to use WorldCat Admin to customize the Patron ILL Request Form for FirstSearch. The following information helps you customize the Patron ILL Request Form. See the Customize Interlibrary Loan for patrons section for additional information about customizing interlibrary loan in FirstSearch.

• Description of the Patron ILL Request Form feature
• Aspects of the Patron ILL Request Form feature:
  ◦ Persistence
  ◦ Send name to OCLC ILL
  ◦ Display name to patron
  ◦ Library note to patrons
  ◦ Fields on the Patron ILL Request Form

### Description of the Patron ILL Request Form feature

The Patron ILL Request Form feature is described in the following table. The settings for this feature apply to all of your FirstSearch databases that cover materials suitable for ILL requests.

<table>
<thead>
<tr>
<th>PURPOSE</th>
<th>Use the Patron ILL Request Form feature to customize the FirstSearch ILL request Form for your patrons. Note: If ILL Access is turned off, your patrons cannot submit requests in any database and settings for Patron ILL Request Form, Database ILL Settings and ILL via e-mail are ignored.</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOCATION</td>
<td>Click the Resource Sharing section of the main menu, then choose Patron ILL Request Form from the drop-down list under Patron ILL Settings in the sidebar menu.</td>
</tr>
<tr>
<td>DEFAULT SETTING</td>
<td>The default setting for each aspect of Patron ILL Request Form is described below.</td>
</tr>
</tbody>
</table>

### Persistence

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https://help.oclc.org/Discovery_and_Reference/FirstSearch/WorldCat_Admin/Customize_the_Patron_ILL_Request...
Description

Persistence lets you control whether data typed by a patron in the first ILL request of a FirstSearch session is automatically redisplayed by the system (persists) in subsequent ILL requests during the session.

Data typed by a patron in the Patron ID field is masked (replaced by asterisks) so it cannot be read on the screen whether Persistence is on or off. However, this data can be read using an option on a Web browser's View menu to view the page source of the ILL request.

Available values

The values that you can set for **Persistence** are described in the following table.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On (checked)</td>
<td>Default setting. User data persists in subsequent ILL requests during a session.</td>
</tr>
<tr>
<td>Off (not checked)</td>
<td>User data must be retyped for each request during a session.</td>
</tr>
</tbody>
</table>

Send name to OCLC ILL

Description

Send name to OCLC ILL lets you control the order in which the patron's first and last names are sent to the OCLC ILL service.

Available values

The values that you can set for Send name to OCLC ILL are described in the following table.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First name first</td>
<td>FirstSearch sends the patron's name to the OCLC ILL service with the first name before the last name.</td>
</tr>
<tr>
<td>Last name first</td>
<td>Default setting. FirstSearch sends the patron's name to the OCLC ILL service in last-name-comma-first-name format. This format helps library staff search by patron name in the OCLC ILL service.</td>
</tr>
</tbody>
</table>

Display name to patron


Description

Display name to patron lets you control the order in which the FirstSearch ILL request form prompts for the patron's first and last names.

Available values

The values that you can set for Display name to patron are described in the following table.

<table>
<thead>
<tr>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First name first</td>
<td>Default setting. The FirstSearch Patron ILL Request Form prompts for the patron's first name before the last name.</td>
</tr>
<tr>
<td>Last name first</td>
<td>The FirstSearch Patron ILL Request Form prompts for the patron's last name before the first name.</td>
</tr>
</tbody>
</table>

Library note to patrons

Description

Library note to patrons lets you provide information to your patrons. In addition to any note that you supply, the FirstSearch Patron ILL Request Form includes basic instructions for completing the form and a warning concerning copyright restrictions.

Available values

The values that you can set for Library note to patrons are described in the following table.

<table>
<thead>
<tr>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No note (blank)</td>
<td>Default setting. No note.</td>
</tr>
<tr>
<td>Note</td>
<td>If you provide a note, a short one is recommended to limit the space it occupies on the Patron ILL Request Form. However, you can provide any amount of information needed by your patrons. The entire note is displayed to patrons in a single paragraph even if you type it in multiple paragraphs in the administrative module.</td>
</tr>
</tbody>
</table>

Fields on the Patron ILL Request Form
Description

The Patron ILL Request Form feature also lets you answer the following questions about each field available for use in the FirstSearch Patron ILL Request Form:

- Does your library require that the field contain data before FirstSearch will accept the request?
- Will the field be displayed to patrons?
- May patrons modify or enter data in the field?
- What label should the field have to describe it to your patrons?
- Will your library supply data for the field to be included in requests or modified by patrons? Or, should the field be blank when patrons begin to enter a request?

Available values

The values that you can set for fields on the Patron ILL Request Form are described in the following table. Each row in the table defines one field and lists the default settings for the field. The default setting for each field’s library-supplied data is blank (no data).

Length of labels

Each field label can contain up to 20 characters and blank spaces.

Length of data

The maximum length of library-supplied data varies by field.

Most fields. The library-supplied data for most fields can contain up to 40 characters and blank spaces.

Comments field. Although the library-supplied data for the Comments field can contain many characters, the field is intended for patron comments about the request. Leave it blank or include only a brief note.

Dept-or-Branch and Status fields. The Dept-or-Branch and Status fields are designed to display lists of options from which patrons select. If you include those fields on the form for your patrons, you must provide the options in your library-supplied data. Each option in the Dept-or-Branch field or the Status field can contain up to 40 characters and blank spaces. For example, if you type Faculty;Grad;Undergrad;Library staff;Other as the library-supplied data for the Status field, FirstSearch displays the following options for that field in the Patron ILL Request Form in FirstSearch:

- Faculty
- Grad
- Undergrad
- Library staff
- Other

To learn more about the Dept-or-Branch and Status fields, experiment with them in the administrative module and
consult the online help for the Patron ILL Request Form feature.

Table

The following table describes the Patron ILL Request Form fields. The last column is provided only for your information. Each field label you provide can contain up to 20 characters and blank spaces. The default setting for each field's library-supplied data is blank (no data). For information about the maximum length of library-supplied data for each field, see [Length of data](https://help.oclc.org/Discovery_and_Reference/FirstSearch/WorldCat_Admin/Customize_the_Patron_ILL_Request…).

<table>
<thead>
<tr>
<th>FIELD</th>
<th>FIELD LABEL</th>
<th>LIBRARY-SUPPLIED DATA</th>
<th>DEFAULT SETTINGS FOR FIELD USAGE</th>
<th>OCLC WORLDCAT RESOURCE SHARING FIELD THAT RECEIVES THE DATA</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td></td>
<td></td>
<td>Required: on</td>
<td>Patron</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Displayed: on</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Modifiable: on</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td></td>
<td></td>
<td>Required: on</td>
<td>Patron</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Displayed: on</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Modifiable: on</td>
<td></td>
</tr>
<tr>
<td>Address</td>
<td></td>
<td></td>
<td>Required: on</td>
<td>Address</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Displayed: on</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Modifiable: on</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
<td></td>
<td>Required: off</td>
<td>Address</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Displayed: on</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Modifiable: on</td>
<td></td>
</tr>
<tr>
<td>State/Region/Prov.</td>
<td></td>
<td></td>
<td>Required: off</td>
<td>Address</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Displayed: on</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Modifiable: on</td>
<td></td>
</tr>
<tr>
<td>Postal Code</td>
<td></td>
<td></td>
<td>Required: off</td>
<td>Address</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Displayed: on</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Modifiable: on</td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td></td>
<td></td>
<td>Required: off</td>
<td>Address</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Displayed: on</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Modifiable: on</td>
<td></td>
</tr>
<tr>
<td>Telephone</td>
<td></td>
<td></td>
<td>Required: on</td>
<td>Phone</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Displayed: on</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Modifiable: on</td>
<td></td>
</tr>
<tr>
<td>Fax</td>
<td></td>
<td></td>
<td>Required: off</td>
<td>Fax</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Displayed: on</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Modifiable: on</td>
<td></td>
</tr>
<tr>
<td>FIELD</td>
<td>FIELD LABEL</td>
<td>LIBRARY-SUPPLIED DATA</td>
<td>DEFAULT SETTINGS FOR FIELD USAGE</td>
<td>OCLC WORLDCAT RESOURCE SHARING FIELD THAT RECEIVES THE DATA</td>
</tr>
<tr>
<td>---------------</td>
<td>--------------------</td>
<td>-----------------------</td>
<td>----------------------------------</td>
<td>------------------------------------------------------------</td>
</tr>
<tr>
<td>Email</td>
<td></td>
<td></td>
<td>Modifiable: on</td>
<td>Email</td>
</tr>
<tr>
<td>Patron ID</td>
<td></td>
<td></td>
<td>Required: off</td>
<td>ID</td>
</tr>
<tr>
<td>Max Cost</td>
<td></td>
<td></td>
<td>Required: off</td>
<td>Maximum Cost</td>
</tr>
<tr>
<td>Date Needed</td>
<td></td>
<td></td>
<td>Required: off</td>
<td>Need Before</td>
</tr>
<tr>
<td>Dept or Branch</td>
<td></td>
<td></td>
<td>Required: off</td>
<td>Department</td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td>Required: off</td>
<td>Status</td>
</tr>
<tr>
<td>Pick-up Location</td>
<td></td>
<td></td>
<td>Required: off</td>
<td>Pickup Location</td>
</tr>
<tr>
<td>Comments</td>
<td></td>
<td></td>
<td>Required: off</td>
<td>Notes</td>
</tr>
</tbody>
</table>