Patron Request Workforms

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Use the Patron Request Workforms screen in OCLC Service Configuration to customize your patron request forms. Patrons can use the patron request forms to request interlibrary loans.

WorldCat Discovery Request Form

For WorldShare Interlibrary Loan libraries, use this screen to customize the WorldCat Discovery Request Form. This request form displays to your patrons in WorldCat Discovery. The image below is an example of the WorldCat Discovery Request Form. The sections of the form are described below.
1. Preview

Once you have configured the form, you can preview how it will appear to patrons. To preview the form, click **Preview**.

2. Section Header

Use the Section Header to assign a title to the section of the request form. Entering a header can help the patron understand the type of information you expect them to input in the fields contained in the section. For example, you can title a section "About My Request" to inform patrons that the following fields will ask for information about the item being requested. To edit the Section Header, enter a new **header** into the Section Header field.

3. Remove a Section

Use the Remove a Section button to remove the section. Note: You will not be asked to confirm the removal of the section. Before clicking the button, make sure you want the section to be removed. To remove the section, click **Remove a Section**.

4. Move a section

The arrows allow you to change a section's position on the form. Arrows will only appear in the directions you can move the sections. To move the section up on the form, click the **up arrow** (↑). To move the section down on the form, click the **down arrow** (↓).
5. Field

The fields you select determine what appears on the request form. If you have not configured the form yet, default fields will be selected. Note: Only the Note to Patron field can be reused on the forms. All other fields can only be used once. To add a field, see 11. Add a field to display on this Section. To change a field, click the Field list and select a new field. To delete a field, see 10. Remove (delete) a field.

6. Input Type

The Input Type displays how the patron inputs information into the field. Input type is fixed for each field.

7. Field Label

The Field Label determines how the field is described on the form. Each field has a default field label. Use the field label to provide patrons with a description of the information you would like them to input in the field. For example, Patron Max cost could be relabeled to Max cost I am willing to pay. Note: Field labels are limited to 30 characters. To edit a field label, enter a new label in the Field Label.

8. Field Values

Field Values can be used to enter default text or options that will appear on the form to the patron. For example, you may enter a value for Patron Max cost to let patrons know the maximum amount charged for any item. If the Input Type is dropdown, you can select the default selection from the list, or depending on the field, you can enter your own values to appear in the dropdown. If the Input Type is textentry, you can enter default text in the field.

9. Options

Options allow you to further define the fields on your form. By selecting an option, you can make fields required or editable. Select the Required check box if you want the field to be required. When a field is required, patrons must provide information in the field in order to submit the form. Patrons will encounter an error if they try to submit the form without filling out all required fields. Deselect the Required check box if you do not want the field to be required. When a field is not required, patrons do not have to fill in the field. Select the Editable check box so that patrons can edit the field. Most fields should be editable. Deselect the Editable check box if you do not want patrons to edit the field. You can enter a value in the 8. Field Values that patrons cannot edit.

10. Remove a field

Use the remove icon to remove a field from the section.
Note: You will not be asked to confirm the removal of a field. Before clicking the remove icon make sure you want the field to be removed. To remove a field, click the remove icon to remove a field from the section.

11. Add a field to display on this Section

Use the Add a field to display on this Section button to add another field to the section. To add a field to the section, click Add a field to display on this Section.

12. Add a Section

Use this button to add another section to the form. To add a section to the form, click Add a Section.

13. Reset to Standard Form

Use the Reset to Standard Form button to reset the form to the default (non-customized) version of the form. To reset the form, click Reset to Standard Form.
14. Save and Cancel

Once you have completed editing the form, you can save or cancel your changes. To save the form, click Save. To cancel your changes, click Cancel.

Watch a video

Configuring patron-initiated requests for WorldCat Discovery (8:50)

Learn how to configure patron-initiated ILL requesting for WorldCat® Discovery to allow your patrons to search and identify items, then initiate requests.

Configure Your Patron Request Form

Follow the instructions below to configure your patron request form. For an explanation of each section of the form, see WorldCat Discovery Request Form.

Configuration tips

Some points to keep in mind when configuring your form:

- Use the definitions in Patron Section Fields / All the WorldCat Discovery Request Form Fields to create a draft of your form.
- Only the Note to Patron field can be reused on a form. All other fields can only be used once.
- Fields can be grouped into sections under a labeled Section Header to organize the information on the form.
- Sections can be moved up or down at any time by clicking the arrows in the upper right corner of each section.
- Fields can be reordered by removing and adding them in the order that you would like them to appear on your form.
- You can preview your form before you save it to confirm that it will appear to your patrons as you expect.
- Any updates you make to the patron request form will not take effect immediately. Changes will usually appear on the form within 2-3 minutes.

Before you begin: WorldCat Discovery or WorldCat Local Request Form set up

If you want the WorldCat Discovery or WorldCat Local Request forms to function properly, you must first configure the following:

1. The Resource Sharing (Any Level) button must be set to WCRS/WS ILL for patron requests in WorldCat Discovery or WorldCat Local to be submitted to WorldShare Interlibrary Loan.
   1. To configure the button, in Service Configuration, on the left navigation, click My WorldCat.org > Place Hold/Request Buttons.
2. On the Place Hold/Request Buttons screen, under Resource Sharing (Any Level), select WCRS/WS ILL from the Type of button configuration list.

2. Your institution's IP Addresses must also be entered in Service Configuration so that patrons who are within your IP range are able to access the request form.
   1. To add an IP address, in Service Configuration, on the left navigation, click IP Addresses > Manage IP Addresses.
   2. On the Manage IP Addresses screen, click Add.
   3. In the window, enter an IP address range.
   4. Click OK.
   5. Under IP Address Range Attributes, click the plus sign (+) to add an attribute to the IP address range.
   6. From the first list, select Product.
   7. From the second list, select WorldCat Discovery.
   8. Click Save.
   9. Repeat steps b-h as needed.
   10. Continue to Customize the patron request form below.

Customize the patron request form

If this is your first time customizing the patron request form, the form will contain default fields. Forms can be customized to include parameters and information relevant to your library. Refer to WorldCat Discovery Request Form for an explanation of each section of the form.

To customize your patron request form:

1. In Service Configuration, on the left navigation, click WorldShare ILL > Patron Request Workforms.
2. If this is your first time customizing the form, you will see the default form.
3. Edit the Section Header or use the default text.
4. Under Field, click the field list to select a field.
   ◦ Input type is fixed for each field and will change depending on the field you select.
5. Optional. Rename the field by entering a new Field Label.
   ◦ Use the field label to provide patrons with a description of the information you would like them to enter.
   ◦ For example, Patron Max cost could be relabeled Max cost I am willing to pay.
   ◦ Field labels are limited to 30 characters.
6. Determine whether you would like to apply any of the Options to the field.
   1. Select the required or editable check box to turn the options on.
   2. Deselect the check boxes to turn the options off.
7. Optional. To remove the field, click the remove icon (🗑️) at the end of the field line.
   ◦ You will not be asked to confirm the removal of a field. Before clicking the icon, make sure you want the field to be removed.
8. To add another field, click Add a field to display on this Section.
9. Continue adding and editing the fields you want to include until you are satisfied with that section of the form.
At any time, you can click **Preview** at the top of the form to view the form as a patron will see it.

10. To add another section, click **Add a Section**.

11. Repeat steps 3-10 until you are satisfied with the sections and fields within each.

12. Click **Preview** to confirm that the forms look as you expect.

13. Click **Save** to save your customizations to the form. Patrons will not be able to see the changes you have made to the form until you save it.

Note: At any time, you can click **Reset to Standard Form** at the bottom left of the form to return to the default (non-customized) version of the form.

## Patron Section Fields

The WorldCat Discovery Request Form contains fields that the patron can use to describe themselves or the item they are requesting.

These are all the fields that are available on the WorldCat Discovery Request Form:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address 1</td>
<td>Patron's street address</td>
</tr>
<tr>
<td>Address 2</td>
<td>Other address information, such as Apartment, Suite, etc.</td>
</tr>
<tr>
<td>City</td>
<td>Patron's city</td>
</tr>
<tr>
<td>Country</td>
<td>Patron's country. Select your country from the list to make it the default setting.</td>
</tr>
<tr>
<td>Department</td>
<td>This field can be customized to allow patrons to select a department they are associated with from a customized list.</td>
</tr>
</tbody>
</table>

- For information on how to customize the list, see above, 8. Field Values.
- Note: Be consistent when entering the department names

Examples:

- Department of Chemistry, Department of English, Department of History, etc.
- ChemDept, EngDept, HistDept, etc.
- Chemistry, English, History, etc.
<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edition</td>
<td>Allows the patron to select the preferred edition of the requested item from a list (Any, Recent, This).</td>
</tr>
<tr>
<td>Email</td>
<td>Patron's email address</td>
</tr>
<tr>
<td>Fax</td>
<td>Patron's fax number</td>
</tr>
<tr>
<td>First Name</td>
<td>Patron's first name</td>
</tr>
<tr>
<td>Last Name</td>
<td>Patron's last name</td>
</tr>
<tr>
<td>Need by date</td>
<td>Allows the patron to enter the date by which the item is needed (in YYYYMMDD format)</td>
</tr>
<tr>
<td>Note to Patron</td>
<td>Enter additional information or provide directions to patrons. When displayed to the patron, the field will not begin with the Note to Patron field label. This field can be reused throughout the form.</td>
</tr>
<tr>
<td>Notes</td>
<td>Provides the patron with a free text field to enter any relevant information about themselves or their request. This field cannot be reused.</td>
</tr>
<tr>
<td>Patron Id</td>
<td>Allows the patron to enter an identification number (library card, student or faculty id, etc.) in a free text field.</td>
</tr>
<tr>
<td>Patron Max cost</td>
<td>If your library charges patrons for certain types of ILL requests, this field allows you to ask patrons to provide information about the maximum amount (in US dollars) that they are willing to pay for a particular item. If it is used, the label could be changed to provide patrons...</td>
</tr>
</tbody>
</table>
with clearer instructions about what information to enter, or a Note to Patron could be added to explain the meaning of this field.

Examples:

- Max cost I am willing to pay (see above, 7. Field Label)
- Enter the maximum amount that you would be willing to pay for this item if it cannot be obtained for free. (Note to Patron)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone</td>
<td>Patron's phone number</td>
</tr>
<tr>
<td>Pickup Location (Maximum 400 branches)</td>
<td>Allows the patron to select a preferred pickup location from a customized list.</td>
</tr>
<tr>
<td></td>
<td>• For information on how to customize the list, see above, 8. Field Values.</td>
</tr>
<tr>
<td>Postal Code</td>
<td>Patron's postal code (e.g., zip code)</td>
</tr>
<tr>
<td>Service Type</td>
<td>Allows the patron to select the type of service being requested from the two options in the list (Book/Media-Loan and Article - copy)</td>
</tr>
<tr>
<td>State/Province</td>
<td>Allows the patron to enter their state. Select your state or province from the list to make it the default setting. Values are available to the United States, Canada, and Australia. A country must be selected if State/Province is included on the form.</td>
</tr>
<tr>
<td>Status</td>
<td>Patron’s status (within the library, company, school, etc.), selected from a list of customized statuses.</td>
</tr>
<tr>
<td></td>
<td>• For information on how to customize the list, see above, 8. Field Values.</td>
</tr>
</tbody>
</table>

**Patron workform field population**

When a patron uses a patron request workform in the Tipasa user portal, some patron data is automatically populated into the workform.

Auto-populated fields include:
• First Name
• Last Name
• Patron ID
• Email
• Phone

Other fields, although they may be present in the patron record, will **not** auto-populate in the workform. These include:

• Address 1
• Address 2
• City
• State/Province
• Postal Code
• Pickup Location
• Department
• Status

Keep in mind that you can label fields so that they are more meaningful to your patrons.