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.

Learn more in a training course: Patron Management & Notifications

### Request Types

As a Tipasa user, you have access to four types of request forms:

<table>
<thead>
<tr>
<th>FORM</th>
<th>DESCRIPTION</th>
<th>ACCESSIBLE TO PATRONS FROM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article</td>
<td>The default form allows patrons to request articles.</td>
<td>My Account</td>
</tr>
<tr>
<td>Book</td>
<td>The default form allows patrons to request books.</td>
<td>My Account</td>
</tr>
<tr>
<td>Other</td>
<td>The default form allows patrons to request other types of materials (e.g., dissertations, audio visuals). You can customize the form to suit your library's most requested &quot;other&quot; type of material.</td>
<td>My Account</td>
</tr>
<tr>
<td>WorldCat Discovery</td>
<td>This form allows libraries with WorldShare ILL and WorldCat Discovery to create a request form that displays in WorldCat Discovery and allows patrons to place requests for items not held by your library.</td>
<td>WorldCat Discovery</td>
</tr>
</tbody>
</table>
Table:

<table>
<thead>
<tr>
<th>FORM</th>
<th>DESCRIPTION</th>
<th>ACCESSIBLE TO PATRONS FROM</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Note:</strong> OCLC recommends using the forms available through My Account and using OpenURL to link your resource sharing button to the My Account forms. For more information, see <a href="https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/080Patron_Request_workforms">Before you begin: WorldCat Discovery and WorldCat Local libraries only</a>.</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** You will need to substitute your institution’s registry ID to customize the direct links. If you have [customized your patron request form names](https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/080Patron_Request_workforms), the direct link name will not reflect those changes.

**Find your Registry ID:**

- Sign in to [OCLC Service Configuration](https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/080Patron_Request_workforms)
- Navigate to the [WorldCat Registry > Identifiers](https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/080Patron_Request_workforms)
- Find the Identifier Type [WorldCat Registry ID](https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/080Patron_Request_workforms) and the associated number

**Article, Book, and Other Forms**

The image below is an example of the Book Request Form. The sections of the form are described below. The Book form is similar to the Article and Other forms, but the WorldCat Discovery form differs in available fields and sections.

For more information on the WorldCat Discovery request form, see [WorldCat Discovery Request Form](https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/080Patron_Request_workforms).

When you have familiarized yourself with the sections of the form, see [Configure Your Patron Request Form](https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/080Patron_Request_workforms) for instructions on customizing your request forms.

**Note:** For an explanation of each available field, please see [Patron Request Workform fields](https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/080Patron_Request_workforms).
1. Preview

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

2. Display Name

The Display Name determines how the form button will be labeled for users in My Account. To edit the Display Name, enter a new **name** in the Display Name field.

3. In Use

The In Use field turns the form on or off. Forms will not be available to patrons in My Account when they are disabled. The default is Enabled. To enable the form, select **Enabled**. To disable the form, select **Disabled**.

4. URL

The URL indicates the page where the forms are located. Click the **URL** to view the forms.
5. 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. Links and basic HTML formatting can be included in the Section Header. See Include links and formatting. To edit the Section Header, enter a new header into the Section Header field.

6. 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.

7. 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 (↓).

8. 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 14. 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 13. Remove (delete) a field.

For an explanation of each available field, please see Patron Request Workform fields.

9. Input Type

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

10. Field Labels

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.

11. 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.

12. 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.
13. Remove (delete) 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.

14. 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.

15. Add a Patron Section

Use the Add a Patron Section button to add a Patron Section to the form. See Patron Section Fields for a description of each field in the Patron Section. To add a patron section, click Add a Patron Section.

16. Add a Bibliographic Section

Use the Add a Bibliographic Section button to add a Bibliographic Section to the form. See Bibliographic section fields for a description of each field in the Bibliographic Section. To add a bibliographic section, click Add a Bibliographic Section.

17. 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.

18. 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.

WorldCat Discovery Request Form

Tipasa libraries: Patron requests created from this form cannot be tracked and displayed in My Account. OCLC recommends you use the Article, Book, and Other Forms available in My Account and configure your WorldCat Discovery interlibrary loan requests to be sent via OpenURL to the My Account forms. For more information on configuring your resource sharing button in WorldCat Discovery, see Before you begin: WorldCat Discovery and WorldCat Local libraries only.

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 to 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.

Patron Request Workform configuration

Follow the instructions below to configure and provide links to your patron request forms. For an explanation of each section of the form, see Article, Book, and Other Forms or WorldCat Discovery Request Form. For an explanation of each available field, please see Patron Request Workform fields.

Some points to keep in mind when configuring your form:

- Use the definitions in Bibliographic section fields and Patron Section 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 libraries only**

Tipasa libraries:

- OCLC recommends configuring the resource sharing button in your WorldCat Discovery with OpenURL to link to the forms in My Account. OpenURL will fill in the patron request forms with bibliographic information from the catalog.

Note: The WorldCat Discovery Request Form should not be used, because it only offers IP authentication. If you set up the WorldCat Discovery Request Form, you will be unable to track and view patron requests in My Account.
WorldShare ILL libraries:

- Configure the resource sharing button in your WorldCat Discovery with OpenURL to link to the WorldCat Discovery Request Form with IP authentication.

To enable OpenURL in WorldCat Discovery or WorldCat Local:

1. To configure the Resource Sharing (Any Level) button, in Service Configuration, on the left navigation, click WorldCat Discovery and WorldCat Local > Place Hold/Request Buttons.
2. On the Place Hold/Request Buttons screen, under Resource Sharing (Any Level), select OpenURL 1.0 from the Type of button configuration list.
3. From the Choose an OpenURL Resolver from the OpenURL Resolvers you have already registered with OCLC list, select your request form URL.
4. Click Save.
5. Continue to Step 1: Customize the patron request forms below.

Customize the patron request forms

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

Note: For an explanation of each available field, please see Patron Request Workform fields.

To customize your patron request forms:

1. In Service Configuration, on the left navigation, click WorldShare ILL > Patron Request Workforms.
2. Click the Article Request Form, Book Request Form, Other Request Form, or WorldCat Discovery Request Form accordion, depending on the form you want to customize.
3. If this is your first time customizing the form, you will see the default form.
4. Edit the Section Header or use the default text.
5. 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.
6. 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.
7. 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.
8. 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.
9. To add another field, click **Add a field to display on this Section**.
10. 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.
11. To add another section, click **Add a Patron Section** or **Add a Bibliographic Section** (fields will differ depending on the section you select).
12. Repeat steps 4-11 until you are satisfied with the sections and fields within each.
13. Click **Preview** to confirm that the forms looks as you expect.
14. Click **Save** you 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.
15. Repeat steps 2-14 for any additional forms you want to configure.
16. Continue to Step 2: Provide links to your patron request forms for information on providing links to the forms.

**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.

**Add copyright compliance and acceptance for non-US Libraries**

Confirm and track acceptance of local copyright terms by adding the Copyright Acknowledged and Copyright Declaration fields to your patron request workform.

Libraries in Australia, New Zealand, Spain, and the United Kingdom require a copyright acknowledgement to track acceptance of local copyright terms.

1. Click **Add a Patron Section**. Enter a **Section Header** title.
2. In the new Patron Section, click **Add a field to display on this Section**.
3. Select **Copyright Declaration** and enter your Copyright terms.
4. Click **Add a field to display on this Section**.
5. Select Copyright Acknowledgement.
6. Click Preview to confirm that the form looks as you expect.
7. Click Save to save customizations to the form.

Include links and formatting

Links and basic HTML formatting can be included in selected fields within Patron Request Workforms, making it easier to communicate information to users within the forms.

The below fields allow basic HTML formatting:

- Section Header
- Copyright Declaration
- Notes
- Note to Patron

The allowed formatting tags are:

- Link tag: &lt;a&gt;&lt;/a&gt;
- Bold tag: &lt;b&gt;&lt;/b&gt;
- Italic tag: &lt;i&gt;&lt;/i&gt;
- Underline tag: &lt;u&gt;&lt;/u&gt;
- Paragraph tag: &lt;p&gt;&lt;/p&gt;

Note: Any other HTML or JavaScript codes will be stripped and will not display on the form.

Automatically populate Patron Type on Patron Request Workforms

The value of illPatronType from the patron record will automatically populate in the Status field on Patron Request Workforms. Patron Status will then automatically apply on ILL requests and in Usage Statistics.

Values from the Status field are available in Report Designer and OCLC Usage Statistics. See Reports for more information.

Note: If your library uses WMS Circulation, the value from the Interlibrary Loan Patron Type section of the patron record will be used and not the borrowerCategory. Be sure to supply values in the illPatronType field of the patron load that reflect meaningful categories for statistics related to Interlibrary Loan. See Patron data files for more information about patron loads.

1. In the Patron Section, click Add a field to display on this Section.
2. Select Status.
3. Select the Field Values drop-down.
4. Enter all of the values in use for illPatronType for your institution.
   - Matching is not case sensitive.
illPatronType values for each patron are typically included as part of the patron load. See Patron data files for more information. For libraries who manually create and/or update patron records in the staff interface, the value set as illPatronType in the patron record will be used here.

5. Optional. Edit the Field Label for Status to be more descriptive to your users.
6. Click Preview to confirm that the form looks as you expect.
7. Click Save to save customizations to the form.

The value from the patron record for Patron Type will automatically populate the Status field if a match is found between the value in the patron record and the values configured in the field values drop-down.

Note: If a patron has a Patron Type that has not been added in the Field Values for Status on the Patron Request Workflows, no value will automatically populate in the request. The patron will need to select an option from the configured values.

Configure Pickup Location on Patron Request Workforms

Patron Request Workforms can be configured to use your institution’s Registry Branches as pickup locations. This configuration allows you to easily identify where to send an item for patron pickup if you have multiple branches.

If configured, when a patron selects a pickup location and submits the request form, My Account will send the pickup location as either the Branch Location Registry ID or—if the pickup location is not associated with a Registry ID—the pickup location name. This information stays with the request and is passed to the staff interface. It is also available for use with statistics.

1. In Service Configuration, on the left navigation, click WorldCat Registry > Branches and Affiliates.
2. To add a branch, click the plus symbol (+) to expand the branch option. You can add new branches by:
   a. Searching the registry for a branch.
   b. Adding a new institution as a branch or an affiliate.
   Note: If your institution is using WMS, you may find that branches have already been configured.
3. On the left navigation, click WorldCat Discovery and WorldCat Local > Holdings Codes & Shelving Location Messages > Holding Codes Translation Table.
   a. Add a row for each Registry Branch. See Holding Codes & Shelving Location Messages for more information.
4. On the left navigation, click WorldShare ILL > Patron Request Workforms.
5. Open the workform (i.e., Book Request Form) that should have the Pickup Location field.
6. Add the Pickup Location.
7. Set the Pickup Location field as required/not required based on the desired behavior.
   a. Click click to view/edit field values. If the field was not previously configured for this form, the Current Locations tab will not contain any values.
   b. Click the Add Locations tab to choose values. Registry values will appear under WorldCat Registry locations. Select the branches that apply to this workform.
   Note: To add or edit the Registry institutions, branches, and/or affiliates displayed under WorldCat Registry locations, click the WorldCat Registry link.
c. (Optional) Enter non-Registry pickup locations in the Other locations text box.

d. Click **Done** to add selected WorldCat Registry and/or Other locations to the Current Locations tab.

e. On the Current Locations tab:

   i. Select **No selection** to allow the form to default with no value or if pickup location will not be a required field.

   ii. Select the **value** that should be the default. The list will populate in the order shown in Current Locations, but the default value can be any value in the list.

8. Click **Done** to complete the Pickup Location setup.

   Note: Be sure to save the workflow to save changes to the Pickup Location. Click **Preview** to see how the drop-down list will appear to patrons using the workflow.

9. Repeat steps 5-8 for each workflow that has a Pickup Location.

**Provide links to your patron request forms**

Provide your patrons with links to the Article, Book, and Other Forms using OpenURL.

**OpenURL**

An OpenURL can be used to configure your library's discovery interfaces to send OpenURLs to the request forms for items that your patrons want to borrow. OpenURLs take the bibliographic information from the discovery interface and insert it into the appropriate patron request form.

Use the following base URL in the configuration modules of your discovery interfaces and replace xxxxxxx with your library's WorldCat Registry ID ([Find your Registry ID](https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/080Patron_Request_workforms)):

```
https://xxxxxx.account.worldcat.org/account/route/openurl?
```

If the discovery interface requires you to configure custom linking syntax, see Configure Custom OpenURL Links.

**Patron Request Workform fields**

**Bibliographic Section Fields**

The Bibliographic Section contains fields that patron can use to describe the item they are requesting.

These are all the fields available in the Bibliographic Section:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article title/Chapter title</td>
<td>Name of the article or chapter</td>
</tr>
<tr>
<td>Article author</td>
<td>Author of the article</td>
</tr>
</tbody>
</table>

---

https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/080Patron_Request_workforms
Printed: Wed, 12 Jan 2022 18:44:01 GMT
<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Author</td>
<td>Author of the item</td>
</tr>
<tr>
<td>Date</td>
<td>Publication date of the item</td>
</tr>
<tr>
<td>DOI</td>
<td>Digital object identifier</td>
</tr>
<tr>
<td>Edition (text)</td>
<td>Edition of the item</td>
</tr>
<tr>
<td>Format</td>
<td>Format of the item</td>
</tr>
<tr>
<td>ISBN</td>
<td>International Standard Book Number (ten or thirteen-digit number)</td>
</tr>
<tr>
<td>ISSN</td>
<td>International Standard Serial Number (eight-digit number)</td>
</tr>
<tr>
<td>Issue</td>
<td>Issue of the article</td>
</tr>
<tr>
<td>OCLC#</td>
<td>OCLC Number, a unique identifier assigned to WorldCat records</td>
</tr>
<tr>
<td>Page Numbers</td>
<td>Page numbers of the article or chapter</td>
</tr>
<tr>
<td>Place of Publication</td>
<td>Item's place of publication</td>
</tr>
<tr>
<td>PMID</td>
<td>PubMed identifier</td>
</tr>
<tr>
<td>Publisher</td>
<td>Publisher of the item</td>
</tr>
<tr>
<td>Title/Journal Title</td>
<td>Title of the item [e.g., book or journal (if it is an article request)]</td>
</tr>
<tr>
<td>Where did you learn about this item</td>
<td>Allows the patron to enter information about where they found the item (e.g., catalog, Google Scholar, etc.)</td>
</tr>
<tr>
<td>Volume</td>
<td>Volume of the item</td>
</tr>
</tbody>
</table>

**Patron Section Fields**

The Patron Section contains fields that the patron can use to describe themselves or the item they are requesting.

For information on how to customize the list, see [11. Field Values](https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/080Patron_Request_workforms).

These are all the fields that are available in the Patron Section:
<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>Copyright Acknowledged</td>
<td>Patron acknowledges the copyright terms set by the institution. The patron must acknowledge the copyright terms on the patron request work form to submit copy requests.</td>
</tr>
<tr>
<td>Copyright Declaration</td>
<td>Declaration of copyright terms to the patron. Links and basic HTML formatting can be included in the Copyright Declaration as well. See Include links and formatting.</td>
</tr>
<tr>
<td>Country</td>
<td>Patron's country. Select your country from the list to make it the default setting or, to pre-populate Patron Request Workforms with the country as entered in the patron record, see Tab-delimited patron data loading.</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>
<tr>
<td></td>
<td>• For information on how to customize the list, see 11. Field Values.</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>• <strong>Note</strong>: Be consistent when entering the department names.</td>
</tr>
<tr>
<td></td>
<td><strong>Examples:</strong></td>
</tr>
<tr>
<td></td>
<td>• Department of Chemistry, Department of English, Department of History, etc.</td>
</tr>
<tr>
<td></td>
<td>• ChemDept, EngDept, HistDept, etc.</td>
</tr>
<tr>
<td></td>
<td>• Chemistry, English, History, etc.</td>
</tr>
<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></td>
<td>This field appears in the <strong>Notes</strong> field of the <strong>Patron</strong> section in the borrowing request.</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></td>
<td>Links and basic HTML formatting can be included in the Note to Patron field. See <a href="https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/080Patron_Request_workforms">Include links and formatting</a></td>
</tr>
<tr>
<td></td>
<td><strong>Examples:</strong></td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Notes       | Provides the patron with a free text field to enter any relevant information about themselves or their request. This field cannot be reused. The borrowing library can use this field to enter relevant information as well. Entered via the Comments field in the patron workform. The borrowing library can access the Notes field in the Patron section of the borrowing request. Links and basic HTML formatting can be included in the Notes field. See Include links and formatting. Character limit: 500 If the Patron Max cost and Need by Date are included on the Patron Request Workform, any information added to these fields are included in the Notes field and are included in the 500 character limit. Examples of potential patron entries:  
  • Maximum cost $5.00  
  • Can pick up from East Branch on Tuesdays. |
<p>| Patron ID   | Allows the patron to enter an identification number (library card, student or faculty id, etc.) in a free text field. If you have enabled Tipasa and WorldShare Circulation integration, you must include this field on the Patron Request Workform and select Required. Please see Set up integration for more information. |
| Patron Max cost | If your library charges patrons for certain types of ILL requests, this field allows you to ask patrons to |</p>
<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| Max Cost | 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 with clearer instructions about what information to enter, or a Note to Patron could be added to explain the meaning of this field. This field appears in the Notes field of the Patron section in the borrowing request. **Examples:**  
  • Max cost I am willing to pay ([10. 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]) Please see Maximum Cost for information about setting the institution's maximum cost. |
| Phone | Patron's phone number. You should recommend patrons to enter their mobile phone number so that they can receive SMS notifications about their request. See Notifications for more information. |
| Pickup Location | Allows the patron to select a preferred pickup location from a customized list. Additionally, locations configured in the WorldCat Registry and added to the Holding Codes Translation Table can be added as the Pickup Location.  
  • See Configure Pickup Location on Patron Request Workforms for more information about configuring your institution's Registry branches as pickup locations.  
  • See Branches and Affiliates for more information about adding locations in the WorldCat Registry.  
  • See Holding Codes & Shelving Location Messages for more information about adding rows in the Holding Codes Translation Table. |
<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<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 or, to pre-populate Patron Request Workforms with the state/province as entered in the patron record, see Tab-delimited patron data loading.</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>• Enter the values one per line.</td>
</tr>
<tr>
<td></td>
<td>• The first value will be the default value. If you do not want a value to be selected by default, leave the first line blank.</td>
</tr>
<tr>
<td></td>
<td>• To pre-populate Patron Request Workforms with the patron’s status as entered in the patron record, see Tab-delimited patron data loading.</td>
</tr>
</tbody>
</table>

**Configure Custom OpenURL Links**

An OpenURL can be used to configure your library’s discovery interfaces to send OpenURLs to the request forms for items that your patrons want to borrow. OpenURLs take the bibliographic information from the discovery interface and insert it into the appropriate patron request form.

Use the following base URL in the configuration modules of your discovery interfaces and replace xxxxxxx with your library’s WorldCat registry ID (Find your registry ID):

https://xxxxxxx.account.worldcat.org/account/route/openurl?
Here's an example of OpenURL 1.0 syntax:

- https://12345678.account.worldcat.org/account/route/openurl?rfr_id=\$rfr_id\$&genre=\$rft.genre\$&jtitle=\$rft.jtitle\$&rft.atitle=\$rft.atitle\$&rft.volume=\$rft.volume\$&rft.date=\$rft.date\$&rft.pages=\$rft.pages\$&rft.issn=\$rft.issn\$&rft.au=\$rft.au\$&rft_id=info.oclcnum/\$oclcnum\$

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<th>OPENURL 1.0 (Z39.88-2004)</th>
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<tbody>
<tr>
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<tr>
<td>Author/Article Author</td>
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<td></td>
</tr>
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<td></td>
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<tr>
<td>Page Numbers</td>
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<td>rft.pages</td>
</tr>
<tr>
<td>WORKFORM FIELD NAME</td>
<td>OPENURL 0.1</td>
<td>OPENURL 1.0 (Z39.88-2004)</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>-------------</td>
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</tr>
<tr>
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<tr>
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<td></td>
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<td>rft.title</td>
</tr>
<tr>
<td>Where did you learn about this item?</td>
<td>sid</td>
<td>rfr_id</td>
</tr>
<tr>
<td>Volume</td>
<td>volume</td>
<td>rft.volume</td>
</tr>
</tbody>
</table>

*The value of sid/rfr_id will not display to the user in the workform. This data is stored and will be visible to library staff in the request Verification field in Tipasa. If the user enters a value in the Where did you learn about this item? field, this data will also be visible to staff in the Verification field.

WorldCat Discovery users, see [Before you begin: WorldCat Discover libraries only](https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/080Patron_Request_workforms) for instructions on how to configure OpenURL.

### Patron workform field population

When a patron uses a patron request workform in My Account, 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.