OPAC Statuses, Locations and Circulation Policies

(Only applicable for WMS, WorldCat Local, and WorldCat Discovery libraries using real-time availability)

Use this screen to define circulation and lending policies. WorldCat Local and WorldCat Discovery use OCLC numbers to link between these services and your catalog. Therefore, OCLC numbers must be present in your local catalog, and must be consistently indexed within your ILS.

If you would like to configure your WorldCat Local and WorldCat Discovery to search your library catalog using the NISO Z39.50 Protocol, you may also need to map the OCLC number index to an attribute in your Z39.50 server.

When you are finished, click **Save Changes** to save and continue, or **Cancel** to start over.

Local links to Online Content

WorldCat Local and WorldCat Discovery will attempt to get local OPAC links (for example, 856 links) to online content from the OPAC:

**Which local OPAC links to online content should display in WorldCat Local**: Links have been set at a default level. Click the check box if you do not wish to display OPAC links to online content that look like a duplicate of one already retrieved from the OPAC.

These fields are not editable at this time. If you feel these are incorrect, contact [OCLC Support](https://help.oclc.org/Librarian_Toolbox/OCLC_Service_Configuration/WorldCat_Discovery_and_WorldCat_Local/050OPAC_Statuses%2C_Locations_and_Circulation_Policies).

The display of local OPAC links in WorldCat Discovery is configured in the [Full Text and Open Access Links](https://help.oclc.org/Librarian_Toolbox/OCLC_Service_Configuration/WorldCat_Discovery_and_WorldCat_Local/050OPAC_Statuses%2C_Locations_and_Circulation_Policies).

Item Availability from OPAC

WorldCat Local will attempt to get local item availability information from your local OPAC. For information about how statuses are displayed, see [Check item status or location](https://help.oclc.org/Librarian_Toolbox/OCLC_Service_Configuration/WorldCat_Discovery_and_WorldCat_Local/050OPAC_Statuses%2C_Locations_and_Circulation_Policies).

The following information is listed for you in OCLC Service Configuration:

**Note**: Some of these fields are not editable at this time. If you feel these are incorrect, contact [OCLC Support](https://help.oclc.org/Librarian_Toolbox/OCLC_Service_Configuration/WorldCat_Discovery_and_WorldCat_Local/050OPAC_Statuses%2C_Locations_and_Circulation_Policies).

Available fields include:

- **Select your ILS Vendor**: Your ILS Vendor is listed.
- **Select your ILS Product/Version**: Your ILS Product/Version is listed.
- **How should WorldCat Local get item information?**: Shows your selection of whether you want OCLC to “scrape” the information from the OPAC, or use Z39.50.
• **Enter the URL used to search for items in the catalog by OCLC#:** The URL for your catalog. For example: http://olc1.ohiolink.edu/search/o77496353
  Click the check box if you do not wish to display holdings and availability information that look like a duplicate of one already retrieved from the OPAC.

### Item Availability on Search Results

**WorldCat Discovery Only**

- Determine whether to Display Item Availability on search results, course reserves and browse the shelf (for WMS only). Options include:
  - Automatically
  - On Demand
  - Do Not Display

- If you choose to display Item Availability on search results, determine whether to display physical item availability on electronic item search results:
  - Display physical item availability on E-serials
  - Display physical item availability on Mass Digitized Content
  - Display physical item availability on All Other Electronic Content

- Determine whether to Display item availability on detailed records. Options include:
  - Check and display availability for Level 2 institutions automatically
  - Associate particular shelving location with course reserves availability
    Wild cards are honored to key multiple locations.
    (When selected, enter the Shelving Location in the provided field)

  See [Physical item availability](https://help.oclc.org/Librarian_Toolbox/OCLC_Service_Configuration/WorldCat_Discovery_and_WorldCat_Local/050OPAC_Statuses%2C_Locations_and_Circulation_Policies) on electronic resources for more information.

**WorldCat Local Only**

- Determine whether to Display Item Availability on search results.

**WorldCat Discovery and WorldCat Local**

- If you have opted to display item availability on search results, use this section to control the display based on bibliographic type:
  - Monograph
  - Serial
  - Article
  - E-serial
  - Mass digitized electronic content
  - All other electronic content.

**Would you like to treat some item types as a different kind of item?:** Choose whether or not you want to use default WorldCat Local item types. If you want to treat some item types as a different item, provide that information in the table.

Note: MARC fields are determined by the WorldCat Master record.
OPAC Status grid

The OPAC Status grid lists all status messages and fulfillment options that appear in your OPAC.

Note: If the item's library location impacts the policies you set for the item, include all possible combinations of statuses and locations. If the location of an item does not impact the policies you set for the item, leave the location cell blank.

Select the material type tab at the top of the grid (Monographs, etc., serial, article, e-serial, mass digitized items, other e-content).

Configuring column options

1. Click column options. The Column Options pop-up window appears.
2. Choose which column options you would like to see by clicking the Show and Hide buttons.
3. For the columns listed, choose which logic to apply when determining what buttons or links should display based on the statuses and locations retrieved from the OPAC for a given item. The table will be reconfigured for the chosen options.
   Note: A circulating status is any status/location row that has a Status Treatment defined as "available" or "unavailable".

Table row options

- To copy the configuration for an item type and paste the settings to another item type for your institution, click copy to and select an option from the drop-down list.
- To add rows, click either the add 1 row or add 10 rows buttons.
- To delete rows, click the check box next to the row you would like to remove, then click delete selected row(s).

OPAC Status grid columns

For each status message, provide the following information:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>First display LHR with option to search the local OPAC for availability</td>
<td>Check this box to allow users to view the online links and other data contained in the item's LHR, with an option to search the local OPAC for availability. If no LHR is found, availability is displayed automatically. For information about loading Local Holdings Records, please see: <a href="http://www.oclc.org/batchload/holdings/localdatarecords.en.html">http://www.oclc.org/batchload/holdings/localdatarecords.en.html</a> Note: The Any Status/Any Location fulfillment options for E-Content will be used when this box is checked.</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>OPAC Status Message (click to edit)</td>
<td>Item status message that WorldCat Local retrieves from your OPAC (e.g., In Process, On Shelf, etc.)</td>
</tr>
<tr>
<td></td>
<td>Note: To represent Any Status, enter an asterisk (*) instead of typing &quot;Any Status&quot; in the column.</td>
</tr>
<tr>
<td>Location (click to edit)</td>
<td>Item shelving location that WorldCat Local retrieves from your OPAC (e.g., Main Stacks, Reserves, etc.)</td>
</tr>
<tr>
<td>OCLC Standard Status Message</td>
<td>Maps your status string from the OPAC to a standard status (optional).</td>
</tr>
<tr>
<td></td>
<td>Note: Leave this section blank.</td>
</tr>
<tr>
<td>Status Treatment</td>
<td>Select the availability status of the OPAC.</td>
</tr>
<tr>
<td><strong>STATUS</strong></td>
<td><strong>DEFINITION</strong></td>
</tr>
<tr>
<td>available</td>
<td>Item(s) available for checkout</td>
</tr>
<tr>
<td>unavailable</td>
<td>Item(s) not available for checkout (e.g., in use, missing/lost, in repair, etc.)</td>
</tr>
<tr>
<td>journal collective</td>
<td>Item(s) are part of a journal collective</td>
</tr>
<tr>
<td>library use only - available</td>
<td>Item(s) available for in-library use only (e.g., non-circulating items, special collections, etc.)</td>
</tr>
<tr>
<td>library use only - unavailable</td>
<td>Item(s) with restrictions for use</td>
</tr>
</tbody>
</table>

Local Online Links | WorldCat Local only. Choose whether to display any Online OPAC links that are found in your OPAC (e.g.
<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>856 links) for items with this OPAC Status and Location combination.</td>
<td></td>
</tr>
<tr>
<td>Fulfillment for (Level 1)</td>
<td>For items held by Level 1 (your institution), select the check box when you want to display the Place hold button.</td>
</tr>
<tr>
<td>Fulfillment for (Level 2)</td>
<td>For items held by Level 2 (your consortium or group), select the check box when you want to display the Place hold button.</td>
</tr>
<tr>
<td>Fulfillment for (Level 3)</td>
<td>For items held by Level 3 (your second consortium or group), select the check box when you want to display the Place hold button.</td>
</tr>
<tr>
<td>Fulfillment for (Level 4)</td>
<td>For items held by Level 4 (all WorldCat), select the check box when you want to display a Resource Sharing button for interlibrary loan requests.</td>
</tr>
<tr>
<td>Full Text OpenURL</td>
<td>Choose whether to display the Full text OpenURL resolver for items with this OPAC Status and Location combination. To configure these settings, see Full Text OpenURL Resolvers (outgoing requests).</td>
</tr>
</tbody>
</table>

Note: Depending on your institution’s configuration, all columns may not be displayed.

Using Local Holdings Records (LHRs) for Serial Information

When the LHR option is selected, the following information from an LHR is displayed in WorldCat Local:

- Online links (856)
- Summary holdings data
- Call number (852 $k, h, i, m – in this order)

When the LHR is not used or not found, WorldCat Local searches the local OPAC for availability information.

To display LHRs for serial, article and e-serial information, check the box under the serial tab at the bottom of the screen.

The check box will automatically be selected on the article and e-serial tabs.

Then complete the Holding Codes Translation Table.