Learn how to configure your place hold and request buttons in WorldCat Discovery. To access this screen, sign in Service Configuration, open the WorldCat Discovery and WorldCat Local left navigation, select Place Hold/Request Buttons.

Libraries using WorldShare ILL, ILLiad, Tipasa, or another interlibrary loan service can customize the resource sharing button that appears in WorldCat Discovery and points to your Interlibrary Loan form. The resource sharing button appears under Availability in the Item Detail section of WorldCat Discovery.

Note: The Place Hold (Level 1) button is available to all WorldCat Local and WMS libraries and to WorldCat Discovery libraries who have purchased real-time availability. All libraries can enable a supported Resource Sharing fulfillment option.

Important notes for all button labels:

- If you have configured a Full Text OpenURL resolver for outgoing requests, the button text will display as a link that says Check eResources.

Place Hold/Request button (Level 1)

If patron-initiated requests are allowed, a fulfillment button will appear to users. You may customize the button by providing the following:

- **Level 1 Button Label**: What terminology do you prefer for patron-initiated requests for items in your collection? For best display, keep this label under 25 characters.
  - Click the check box to open the link in a new window when users click the button. This feature does not apply to WorldShare users.
  - Note: This button text will be used in the select menus under the For items owned by... section.
  - Optional. To include translated display text:
    1. Click Add Translations. The text is expanded to display additional fields.
    2. Select a **Language** from the drop-down list and enter **Custom Text** in the text field.
    3. Optional. Click Add Translations to add additional translations.
      - Translated language options include Czech, Dutch, English, French, German, Italian, Japanese, Korean, Maori, Portuguese, Simplified Chinese, Spanish, Swedish, Thai and Traditional Chinese.

Configure additional Place Hold/Request buttons for Level 2 or Level 3 if you have additional fulfillment options.
Recall button (Level 1)

In WorldShare libraries using WorldCat Discovery, if patron-initiated requests are allowed, a recall button will appear to users. Currently, there is no restriction based on the types of items that can be recalled or the types of patrons that can perform a recall. The recall button appears to customers only when there are no items available to check out. To configure item availability, see OPAC Status Grid Table.

1. Check the box to Enable Recalls as a fulfillment option. The Level 1 Tool Tip Text field appears.
2. Enter tool tip text or use the default text, Recall - "Request Item". This text will appear when you hover over the recall button or click on the tool tip icon.
   ◦ For best display, keep this label under 25 characters.
3. Optional. To include translated display text:
   1. Click Add Translations. The text is expanded to display additional fields.
   2. Select a Language from the drop-down list and enter Custom Text in the text field.
   3. Optional. Click Add Translations to add additional translations.
      ◦ Translated language options include Czech, Dutch, English, French, German, Italian, Japanese, Korean, Maori, Portuguese, Simplified Chinese, Spanish, Swedish, Thai and Traditional Chinese.

For information about how to use this feature, see Recall items.

Resource Sharing (Any level)

If you have Resource Sharing Management software that will accept incoming OpenURLs, you can configure it as your resource sharing option in WorldCat Local and WorldCat Discovery. If you do not have resource sharing configuration via OpenURL, WorldCat Local and WorldCat Discovery will display resource sharing options to your patrons when a user is IP authenticated to WorldShare Interlibrary Loan.

The resource sharing options configured at this level (regardless of who holds the item) will always be used. If you do not have ILLiad, WorldCat Local will use WorldShare Interlibrary Loan to let patrons initiate interlibrary loan requests as configured by your settings.

Available fields include:

• Resource Sharing Button Label: This button text will be used in the select menus under the For items owned by... section. For best display, keep this label under 40 characters.
  ◦ To include translated display text:
    1. Click Add Translations. The text is expanded to display additional fields.
    2. Optional. To include translated display text:
      1. Click Add Translations. The text is expanded to display additional fields.
      2. Select a Language from the drop-down list and enter Custom Text in the text field.
      3. Optional. Click Add Translations to add additional translations.
         ◦ Translated language options include Czech, Dutch, English, French, German, Italian, Japanese, Korean, Maori, Portuguese, Simplified Chinese, Spanish, Swedish, Thai and
Traditional Chinese.

- If you do not enter custom text the following text will appear: Request Item through Interlibrary Loan.
- Click the check box to open the link in a new window when users click the button.

• **Type of button configuration:** Choose the type of button for your OpenURL Resolver.
  - Choose **OpenURL 1.0** if you use an OpenURL 1.0 based solution (such as Tipasa, ILLiad, or a web request form)
  - Choose **Custom URL** if you use WorldShare ILL, WorldCat Discovery, WorldCat Local or WMS, to take users to the correct ILL service or workform.
    - Special characters should be encoded for best results.
  - Do not choose **OCLC Resource Sharing**, this option is no longer active
  - Choose **WCRS/WS ILL** if you use WorldCat Resource Sharing or WorldShare ILL

Note: WorldCat Discovery users may only choose **OpenURL 1.0** or **WCRS/WS ILL**

• **Configure an additional button (optional):** You may configure more than one fulfillment button to handle resource sharing requests (at level 2, 3, or 4), although only one button may show at a time. To configure an additional button, click **Configure an additional button**.

**Watch a video**

Configure an ILL request button in WorldCat Discovery (8:51)

This video demonstrates how to configure the ILL request link in WorldCat Discovery.

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**For items owned by [your library]**

Select the options you prefer for when you want to display the fulfillment options to your users at the local, group and worldwide levels. Specify when to display each fulfillment button.

Note: WorldCat Navigator member libraries please contact OCLC to make changes to these OpenURL Resolver Resource Sharing settings.

**Display Level 1 fulfillment button**

Choose when to display a fulfillment button for Level 1. Options include:

- Always
- Never
• It depends on item type
• It depends on item type, status, and location

See Material types for more information.

WMS Place Hold Form Display

If your library is using WMS and configures Display Level 1 fulfillment button, these configuration options appear.

Enable place hold form types and fields your library users can submit from WorldCat Discovery. These configurations apply to Level 1 WMS place hold forms only. For information about how to configure your form, based on material type and format, see Place holds on items.

Use the toggle switch to enable or disable the following fields:

• **Display hold request date fields on place hold form:** Choose to enable “Dates I need it” to display in your request form. This will allow patrons to specify a need by date in their request. WorldCat Discovery only. Display of these fields are collapsed by default.

• **Display shelving locations on Any Copy and Special Request request types:** Choose to enable shelving locations for requests for Any Copy or Special Request types. WorldCat Discovery only.
  - **WMS Place Hold Form Request Types:** Choose to enable
    - **Display Any Copy request type**
      WorldCat Discovery only.
      - **Display hold notes field on Any Copy request**
        This option is only available when Display Any Copy request type is enabled. WorldCat Discovery only.
    - **Display Specific Copy/Volume request type**
      WorldCat Discovery only. Allows library users to select one or many specific copies and volumes from each shelving location, up to 10.
      - **Display hold notes field on Specific Copy/Volume request**
        This option is only available when Display Specific Copy/Volume request type is enabled. WorldCat Discovery only.
    - **Display Special Request request type**
      WorldCat Discovery only. The hold note is the only required field for special requests.
  - **Display Place Hold Redirect Option**
    WorldCat Discovery only.
    - When enabled, libraries using WorldShare Management Services that have multiple fulfillment paths configured in WorldCat Discovery automatically redirect their users from their WMS Place Hold Form to their Libraries WorldWide (Level 4) fulfillment option when an item is unavailable or the user is blocked from placing a hold request. Users will be directed to either their Tipasa request form or WorldShare ILL request form.
      - When the user lands on either form an informational message will display to inform the user that the item was “Ineligible for request at [Library Name]. Request from Other Libraries worldwide below”.
    - Disabled by default.
    - The redirect will only occur when the WorldShare ILL or Tipasa request form has been configured to display for a record that has been configured to display both a WMS place hold AND either ILL option.
To trigger this redirect, the place hold form must encounter one of the below error scenarios:

<table>
<thead>
<tr>
<th>ERROR TYPE</th>
<th>TIMING OF REDIRECT</th>
<th>DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unknown Institution</td>
<td>On submission of place hold form</td>
<td>Institutional information is incorrect or not found</td>
</tr>
<tr>
<td>Unknown Branch</td>
<td>On submission of place hold form</td>
<td>Branch information is incorrect or not found</td>
</tr>
<tr>
<td>Unknown Bibliographic Item</td>
<td>On submission of place hold form</td>
<td>Bibliographic item data is incorrect or not found</td>
</tr>
<tr>
<td>Unknown Item</td>
<td>On submission of place hold form</td>
<td>Item data is incorrect or not found</td>
</tr>
<tr>
<td>Item does not circulate</td>
<td>On submission of place hold form</td>
<td>No matching hold policies</td>
</tr>
<tr>
<td>Temporary process failure</td>
<td>On submission of place hold form</td>
<td>Any system request processing error</td>
</tr>
<tr>
<td>User ineligible to request item</td>
<td>On submission of place hold form</td>
<td>User has reached overall hold limit, material type limit, or has circulation restrictions</td>
</tr>
<tr>
<td>System 400 or 500 error</td>
<td>Immediate</td>
<td>Bad requests or system problems</td>
</tr>
<tr>
<td>System 200 error</td>
<td>Immediate</td>
<td>No WMS pickup options allowed</td>
</tr>
</tbody>
</table>

Note: At least one request type must be enabled when a Level 1 fulfillment button is enabled.

### Display Level 2 or Level 3 fulfillment button

Choose when to display a fulfillment button for Levels 2 or 3. These options will not appear if you have not configured additional levels of fulfillment.

Options include:

- Always
- Never
- It depends on item type
- It depends on item type, status, and location
- When no items available from [your library], it depends on item type, status, and location.

Note: This option appears if your institution has Level 2 or Level 3 fulfillment options and availability is retrieved.
Display WorldCat Libraries fulfillment button

Choose when to display a fulfillment button for WorldCat libraries.

Note: If your library uses availability settings, you must also configure OPAC Statuses, Locations and Circulation Policies.

Material types

- **Monograph** (default type): Anything that is not in one of the groups below
- **Serial**: Leader value of serial, not web-based
- **Article**: Leader value of article
- **E-Serial**: Leader value of text serial and cataloged as an internet resource. Also Leader value of Computer File and cataloged as an internet resource and serial
- **Mass digitized electronic content**: Only assigned to non-article, WorldCat Records with the same original and alternate types before bibliographic matching. Content is defined as mass digitized if one of the following is true:
  - The MARC field 029 has any of the following values:
    - DGCNT
    - CNTNT
    - CNTCOLL
    - DGCOLL
  - The MARC field 040a has the value as OCLCE
- **All other electronic content**: Any other electronic content such as e-books, e-computer files, e-audio, e-visual materials, and e-maps

For items owned by [Level 2 or Level 3]

Choose when to display a fulfillment button for Levels 2 or 3. These options will not appear if you have not configured additional levels of fulfillment.

Select the options you prefer for when you want to display the fulfillment options to your users at the local, group and worldwide levels. Specify when to display each fulfillment button.

Note: WorldCat Navigator member libraries please contact OCLC to make changes to these OpenURL Resolver Resource Sharing settings.

Select which fulfillment button to display for Level 2, Level 3 or when to display the WorldCat Libraries fulfillment button. Options include:

- Always
• Never
• It depends on item type
• It depends on item type, status, and location

See Material types for more information.

For items owned by WorldCat Libraries

Choose the options you prefer if you choose to display fulfillment options to your users at the local, group and worldwide levels. Specify when to display each fulfillment button.

Note: WorldCat Navigator member libraries, please contact OCLC Support to make changes to these OpenURL Resolver Resource Sharing settings.

**Display WorldCat Libraries fulfillment button:** Choose when to display a fulfillment button for WorldCat libraries. You can provide specific text depending on the situation by selecting "It depends on item type, status, and location."

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