User Interface Options

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Learn how to update your user interface display for WorldCat Discovery. To access this screen, sign in Service Configuration, open the WorldCat Discovery and WorldCat Local left navigation, select User Interface Options.

Use this screen to update your banner, custom links and display settings. Indicate if and where you would like to change the default settings. Guidelines for formatting are provided where necessary.

After making changes to the sections described below, click Cancel to start over, or Save Changes to save and continue.

Your WorldCat.org URL

Review your URL(s). Your institution's URL qualifier can be used for multiple services. If it is acceptable as is, go on to Customize the banner (optional). If you would like to change the URL, send a request (include your institution's registry ID) to orders@oclc.org or call OCLC at 1-800-848-5800.

- **Institution Name:** This name will appear in the "Libraries that own this item" line on the search results, in scoping drop-downs, and in the detailed item view where availability is shown. This name is configured in the Relevancy and Scoping module under Display name.

- **WorldCat.org Redirect:** Check this box to automatically redirect WorldCat.org users to your WorldCat Local or WorldCat Discovery URL when they go to a record on www.worldcat.org.
  - To redirect your WorldCat Local URL to your WorldCat Discovery URL, select the option to Redirect WorldCat Local permanent/bookmarked links to WorldCat Discovery.

Note: Users must be IP authenticated to your institution.

Language Options (WorldCat Local)

Select the language that displays for the logo, buttons, and labels in WorldCat Local. The default language is English.

Only certain options are available at this time. More options will be made available in future releases.

Search Language Options (WorldCat Discovery)

It is possible to allow Discovery users to search using boolean operators in French. To allow French boolean operators in WorldCat Discover searches, use the toggle switch to Enable French boolean operators.

The following French boolean operators can be used:
• ET = AND
• OU = OR
• SAUF = NOT

Note: These operators must be entered in all uppercase letters to be considered boolean operators.

General Display Settings

Select default search behavior

Choose whether or not to add full text to your default search behavior in WorldCat Local. Adding this feature will result in additional search options for full text under Advanced Search. For more information about full text searching in WorldCat Local, see Index labels and examples of an expert search in WorldCat.org and WorldCat Local.

Note: The full text fields will only display for databases which support full text.

Display buying options

Buy It is an optional feature that provides an additional delivery method for your users. Turning on Display buying options allows your patrons the option to purchase titles that are available via Amazon.com, Barnes & Noble, Better World Books, Baker & Taylor, and British Library. The Buy it link is determined by ISBN.

Display Course Reserves

If you are using WorldCat Discovery or WorldShare Management Services to manage Course Reserves, see Course Reserves in WorldCat Discovery Services.

If you are using WorldCat Local to manage Course Reserves, activating the Course Reserves link allows your patrons to search for courses and reserved materials in your collection. Course Reserves appears under the Search drop-down menu in WorldCat Local.

There are two levels of permissions in Course Reserves:

• Manager—create/edit/delete courses and titles in courses
• Maintainer—add/remove titles to existing courses

To create and maintain courses, you will need to sign into your WorldCat.org account in WorldCat Local. Libraries with access to OCLC Service Configuration will have access to the Manager role in Course Reserves. If you experience any issues logging in, or with your ability to create and/or manage course reserves after logging in, contact orders@oclc.org for assistance. Include your institution’s OCLC symbol when submitting your request. Similarly, if you would like to request access for other users at your institution, you may also do so by contacting orders@oclc.org.
Display Editions & Formats link on search results

Note: This functionality is for WorldCat Discovery only.

Determine whether or not to allow the View all editions & formats link to appear on search results in WorldCat Discovery.

Example

Clicking on the View all editions & formats link from the search results will open the Explore Editions and Formats section of the item record. For information on filtering Editions and Formats, please see Selected Filters.

Display alternate formats on search results

Note: This functionality is for WorldCat Discovery only.

To help users access all locally held formats from a default edition, libraries can configure other locally-held formats to display on search results. When viewing search results, WorldCat Discovery displays one link for each unique format locally held by your institution.

For more information, see Display locally held formats on search results.

Display call number browse on detailed records

Note: This functionality is for WorldCat Discovery only.

Determine whether or not to allow Browse the Shelf results to appear in detailed records. For more information, see Browse the Shelf to view nearby items.
<table>
<thead>
<tr>
<th>EXAMPLE</th>
<th>FIELD</th>
<th>HEX VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Color of links and text in the banner</strong></td>
<td>Note: This text only appears if no logo is uploaded for the banner. A link to the library's homepage displays in place of the logo and the color of the link is configured here.</td>
<td>Type the hex value in the field provided, or use the color picker to find a hex value.</td>
</tr>
<tr>
<td>1</td>
<td>Search box</td>
<td>The search box is set automatically and cannot be changed.</td>
</tr>
<tr>
<td>2</td>
<td><strong>Search and fulfillment buttons</strong></td>
<td><em>(example: 2178B5)</em></td>
</tr>
<tr>
<td>3</td>
<td><strong>Unvisited Links</strong></td>
<td><em>(example: 2178B5)</em></td>
</tr>
<tr>
<td>4</td>
<td><strong>Hover Links</strong></td>
<td><em>(example: FF8003)</em></td>
</tr>
<tr>
<td>5</td>
<td><strong>Visited Links</strong></td>
<td><em>(example: 5A458D)</em></td>
</tr>
<tr>
<td><strong>The WorldCat Discovery (and associated new A to Z list, My Account v2) header has two main areas, the navigational bar and the banner. The navigational bar holds your custom links, chat, sign in options, etc. We suggest you keep the navigational bar for a neutral background color and emphasize the banner with your institution's brand colors.</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td><strong>Navigational bar color</strong></td>
<td><em>(example: 002856)</em></td>
</tr>
<tr>
<td>7</td>
<td><strong>Banner and footer color</strong></td>
<td><em>(example: 545454)</em></td>
</tr>
<tr>
<td><strong>Navigation bar descriptive text</strong></td>
<td>Additional text to display in navigational bar. We suggest keeping this text succinct.</td>
<td>Phillips Library</td>
</tr>
<tr>
<td>Optional. To include translated display text:</td>
<td>1. Click <strong>Add Translations</strong>. The</td>
<td></td>
</tr>
</tbody>
</table>
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.
**Logo Settings**

<table>
<thead>
<tr>
<th><strong>FIELD</strong></th>
<th><strong>ACTION</strong></th>
</tr>
</thead>
</table>
| Logo image URL                | If your WorldCat.org currently does not have a logo image, or if you would like to replace the current logo image, provide a URL to an image of your institution's logo. The URL must be no longer than 255 characters. The logo image also cannot exceed 80 pixels in height and 275 pixels in width. Match the background color of this image to your logo background color to mimic a screen-width banner. Image formats:  
  • .png  
  • .jpeg  
  • .tiff  
  Note: Images larger than this will automatically be resized. For the best user experience, we recommend configuring a secure image (beginning with "https://"). If the logo image uses "http://" but your user is accessing your WorldCat Local URL via a secured URL, the logo image will not display in the header. In this case, users will see your text from the **Alt-text for the logo** field in place of the logo image. After adding your logo, click **test URL** to confirm your choice. |
| Home page URL                 | Type the URL for the page where the user is sent when they click the logo image.                                                                                                                                                          |
| Logo alternative text         | Type text that will appear when the cursor hovers over the logo.                                                                                                                                                                          |
|                               | Note: Make sure that the colors used for **Alt-text for the logo** and **Text to appear with logo** are descriptive, and the colors are a good combination with the banner color. |
Custom Links

Choose up to 7 custom links to appear in the banner. Provide the URLs, link type and accompanying text for up to 7 custom web links (e.g., links leading to your library home page, Ask a Librarian, or the patron account).

There is a 25 character limit on the text for each link.

Note: If you wish to allow remote access outside your IP address, one of your custom links must be to your remote access page, and you must choose remote access login as the link type.

<table>
<thead>
<tr>
<th>CUSTOM LINK</th>
<th>HOW TO CONFIGURE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom link: Display Chat Widget</td>
<td>Create this link if you want to provide a link to a chat widget.</td>
</tr>
<tr>
<td></td>
<td>You must use Custom link 1. The chat widget will open in a new window when the Chat link is clicked in WorldCat Local.</td>
</tr>
<tr>
<td></td>
<td>• Link type: Select library contact info</td>
</tr>
<tr>
<td></td>
<td>• Display Chat Widget: To display the chat widget for patrons, select Yes.</td>
</tr>
<tr>
<td></td>
<td>• Do you have a QuestionPoint account?</td>
</tr>
<tr>
<td></td>
<td>◦ Yes: If you are a QuestionPoint user, your Qwidget can be generated by supplying your QuestionPoint Institution ID in the box provided</td>
</tr>
<tr>
<td></td>
<td>◦ No: If you do not have a QuestionPoint account, you can display a different chat widget by pasting a code snippet in the Chat code box provided</td>
</tr>
<tr>
<td></td>
<td>▪ Chat code: When copying and pasting a code snippet, ensure that it is copied directly from the source. When the code is copied from an e-mail or text document, carriage returns can sometimes be entered which will cause the code to fail.</td>
</tr>
<tr>
<td></td>
<td>Note: The recommended size for the widget is 185 pixels wide x 275 pixels high. URLs referenced within the chat widget code must utilize HTTPS to avoid mixed content warnings raised by most modern web browsers, which could render the chat widget inoperable.</td>
</tr>
<tr>
<td>Custom link: A to Z list</td>
<td>Create this link to allow patrons to discover electronic...</td>
</tr>
</tbody>
</table>
journals held within the WorldCat knowledge base.

- Link type: Select other
- URL: Use the URL as shown in WorldCat Discovery and WorldCat Local > A - Z List and OCLC Link Resolver. Enter the following URL format: http://[library].on.worldcat.org/atoztitles
- Display text: Create a custom text label of your choice
  - 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.

Create this link if you have a proxy service that allows off-site users outside your IP address to access restricted library content and services.

Use Custom link 3 to configure the remote access login custom link.

- Link type: Select remote access login
- URL: Enter your library's proxy URL. Use this format if your library uses EZproxy:
  http://ezproxy.oclc.org/login?url=
  You might need to check Append current URL to the end of this link
- Display text: Create a custom text label of your choice
  - 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.
When a resource is selected that requires remote authentication, patrons will see a box that says **Authentication Required** and includes a link to sign in.

For more information, see [EZproxy documentation](https://help.oclc.org/Librarian_Toolbox/OCLC_Service_Configuration/WorldCat_Discovery_and_WorldCat_Local/0…). If your library's authentication is managed through a service other than EZproxy, you will want to confirm the URL format with the proxy vendor.

### Availability Column Labels (WorldCat Local)

Column labels for availability information in WorldCat Local are customizable. The default column labels shown will display if these fields are not changed.

To change the column labels for physical availability, type the desired label name in each field.
Authentication Prompt for Restricted Content

A prompt will appear when the user attempts to view records in WorldCat Local and WorldCat Discovery that require authentication. You can customize the text that appears in the prompt. Select **Use the default text**, or customize your text by clicking **Use custom text**.

Note: When default text is selected, the fields under **Use custom text** are not editable.

- **Message:** Type a custom message about your authentication process. There is a 300-character limit in this field. Note: Do not use line breaks, carriage returns or special characters.
  - 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.

- **Remote login button text:** This button will always take the user to the remote access link defined in the custom web links. There is a 70-character limit.
  - 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.

- **Link text to unauthenticated searching:** This link will only display when the user is attempting to view search results that have a mixture of restricted and unrestricted searching. There is a 120-character limit.
  - 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.

- **Other links:** Show other links, such as a link to the Advanced Search screen or previous screen.

Example of the default prompt text:
Customize WMS Sign In Labels

Use these fields to customize the labels for your WMS Sign In screen.

- **Custom WMS "User Name" label**: Provide a label for the User Name field on your WMS Sign In screen.
- **Custom WMS "Password" label**: Provide a label for the Password field on your WMS Sign In screen.
- **Forgot Password text**: Use the default text, or customize your text by typing over the text. There is a 255 character limit.