User Interface Options

Learn how to update your user interface display for WorldCat Discovery. To access this screen, sign in to 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 Branding & Customization. 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.

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**

Note: This functionality is for WorldCat Local only.

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 shelf browse on detailed records**

Note: This functionality is for WorldCat Discovery premium institutions 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.

**Branding & Customization**

**Customize WorldCat Discovery**

WorldCat Discovery colors and custom text are controlled by the below settings.
<table>
<thead>
<tr>
<th>EXAMPLE</th>
<th>SETTING</th>
<th>HEX VALUE</th>
<th>MODERNIZED WORLDCAT DISCOVERY OPTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Color of links and text in the header</strong></td>
<td>Type the hex value in the field provided, or use the color picker to find a hex value.</td>
<td>Classic WorldCat Discovery Option</td>
</tr>
<tr>
<td>1</td>
<td>Search box</td>
<td>The search box is set automatically and cannot be changed.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td><strong>Search and fulfillment buttons</strong></td>
<td><em>(example: 2178B5)</em></td>
<td>Y</td>
</tr>
<tr>
<td>3</td>
<td>Unvisited Links</td>
<td><em>(example: 2178B5)</em></td>
<td>Y</td>
</tr>
<tr>
<td>4</td>
<td>Hover Links</td>
<td><em>(example: FF8003)</em></td>
<td>Classic WorldCat Discovery Option</td>
</tr>
<tr>
<td>5</td>
<td>Visited Links</td>
<td><em>(example: 5A458D)</em></td>
<td>Y</td>
</tr>
<tr>
<td>6</td>
<td><strong>Navigational bar color</strong></td>
<td><em>(example: 002856)</em></td>
<td>Y</td>
</tr>
</tbody>
</table>

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.

Search and fulfillment buttons:
Note: This setting will alter the color customization in My Account as well. See Customize My Account.
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.

Note: Match this to your logo background color to mimic a screen-width banner.

**Header and footer color**

Note: This setting will alter the color customization in My Account as well. See Customize My Account.

| 7 | (example: 545454) | Y |

**Navigation bar descriptive text**

Additional text to display in navigational bar. We suggest keeping this text succinct.

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.

### Customize My Account

My Account custom colors are controlled by the below settings. Updating the below settings will also update them throughout the WorldCat Discovery interface.

My Account custom colors are controlled by the below settings:
<table>
<thead>
<tr>
<th>NUMBER</th>
<th>SETTING</th>
<th>OPTION</th>
<th>EXAMPLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Search and fulfillment buttons</td>
<td>• Buttons</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Icons</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Active Tab</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Header and footer color</td>
<td>• Header and footer</td>
<td>693086</td>
</tr>
<tr>
<td>3</td>
<td>Unvisited links</td>
<td>• Unvisited links</td>
<td>07C7EE</td>
</tr>
<tr>
<td></td>
<td>Visited links</td>
<td>• Visited links</td>
<td>034EA2</td>
</tr>
<tr>
<td>4</td>
<td>Navigational bar color</td>
<td>• Navigational bar</td>
<td>20476B</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ If a Navigational bar color</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>has not been previously set,</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>the default color 545454</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>(dark gray) is used.</td>
<td></td>
</tr>
</tbody>
</table>

Recommendations for color selections:

- For header and footer, select a light color that best reflects your institution's main brand color.
- For buttons and icons, select a dark color that coordinates or contrasts with the secondary color.
- Based on the color selections, the text on the navigation bar will be either white or black.
  - To test the white or black text:
    - In Service Configuration, select the new color and Save. On the My Account page, refresh the browser to apply the new color.
    - Pick a slightly darker color to change the text from black to white.
    - Pick a slightly lighter color to change the text from white to black.
- Sort icons will appear as greyed out when there are no items to sort.
- List headers have a white background and black text.

Watch a video
Customize the user interface options for WorldCat Discovery (8:21)

This video describes the user interface options that may be configured to display in WorldCat Discovery.

Media, iframe, embed and object tags are not supported inside of a PDF.
## Logo Settings

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</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><strong>Custom link: Display Chat Widget</strong></td>
<td>Create this link if you want to provide a link to a chat widget. You must use Custom link 1. The chat widget will open in a new window when the Chat link is clicked in WorldCat Local. • Link type: Select library contact info • Display Chat Widget: To display the chat widget for patrons, select Yes. 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. Note: When using Custom link 1 to provide a chat widget, you will not be able to use the test URL option. The test URL option will display an error for the Chat code as this is not a URL. If using Custom link 1 for a URL, the test URL option will work as expected.</td>
</tr>
<tr>
<td><strong>Custom link: A to Z list</strong></td>
<td>Create this link to allow patrons to discover electronic journals held within the WorldCat knowledge base. • Link type: Select other • URL: Use the URL as shown in WorldCat Discovery and WorldCat Local &gt; 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</td>
</tr>
</tbody>
</table>
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.

Custom link: Proxy

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

- **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.

    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.
that requires remote authentication, staff will see a box that says **Authentication Required** and includes a link to sign in. Patron accounts should sign in with their username and password and do not need to remotely authenticate to view restricted content. Refer to [Enable end-user sign in](https://help.oclc.org/Librarian_Toolbox/OCLC_Service_Configuration/WorldCat_Discovery_and_WorldCat_Local/0…) for more information.

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.

See [Collections/databases in WorldCat Discovery that require authentication before searching](https://help.oclc.org/Librarian_Toolbox/OCLC_Service_Configuration/WorldCat_Discovery_and_WorldCat_Local/0…) to view databases that require this configuration.

### 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.

![Column Labels Example](https://help.oclc.org/Librarian_Toolbox/OCLC_Service_Configuration/WorldCat_Discovery_and_WorldCat_Local/0…)

### Library availability

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 a staff 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.