Configure patron facing features

Follow these instructions to customize patron facing features in WorldCat Discovery. Determine whether or not your library needs to modify the initial selections. WorldCat Discovery configuration options are accessible in the administrative interface, OCLC Service Configuration. If you need help to create an account, see the tutorial Create an Account for OCLC Service Configuration.

Learn more in a training course: WorldCat Discovery configuration: Patron-facing features

Personalize your Discovery interface

Sign in to OCLC Service Configuration, navigate to WorldCat Discovery and WorldCat Local > User Interface Options to:

- Change or add a logo
- Add links to your library contact information page, or links to other pages to which your patrons need access

Watch a video

Customize the user interface options for WorldCat Discovery (7:25)

This video demonstrates where and how to customize the user interface options for your library's WorldCat Discovery.

Enable end-user sign in (for non-WorldShare Management Service libraries)

All WorldCat Discovery libraries can provide sign-in capability for their users. This enables users to save searches and personal lists. See Share records and create citations for more information.

To enable non-WMS logon options, register your library for end user logon capability. The OCLC implementation team will respond to the request and assist with configuration.

Institutions can select from the following implementation options:
- Create new accounts with an OCLC method that supports self-creation of authenticated accounts
- Use existing accounts with an OCLC link to your institution's existing authentication service, if it is compatible.

### Authentication requirements

<table>
<thead>
<tr>
<th>METHOD</th>
<th>AUTHENTICATION REQUIREMENTS</th>
<th>ADDITIONAL INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>LDAP</td>
<td>• External-facing IP/server name accessible from outside your network</td>
<td>• Accounts are created automatically when patrons log in to Discovery for the first time</td>
</tr>
<tr>
<td></td>
<td>• Needs to be secure LDAP (LDAPS or LDAP with StartTLS)</td>
<td>• Library staff can see patron accounts in WorldShare Admin (names and email addresses)</td>
</tr>
<tr>
<td></td>
<td>• Ability to open firewall to list of OCLC IP addresses</td>
<td>• Patrons are greeted with their first name in Discovery upon login</td>
</tr>
<tr>
<td></td>
<td>• LDAP server must be running on port 636</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Root CA certificate from your LDAP server (if your certificate is self-signed or not issued by a major certificate authority). Implementation team will alert you if a certificate is required.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Test account required</td>
<td></td>
</tr>
<tr>
<td>CAS</td>
<td>• Permit access from test and production OCLC URLs</td>
<td>• Accounts are created automatically when patrons log in to Discovery for the first time</td>
</tr>
<tr>
<td></td>
<td>• Supply CAS server URLs</td>
<td>• Accounts will work to authenticate patrons only. No patron name or email address will be visible with the account.</td>
</tr>
<tr>
<td></td>
<td>• GET requests are not currently supported</td>
<td>• Library staff will not be able to see patrons' names or email addresses in WorldShare Admin. All accounts will display as &quot;Not Supplied&quot; as the name.</td>
</tr>
<tr>
<td></td>
<td>• Test account required</td>
<td>• Patrons will not see their first names in Discovery upon login</td>
</tr>
<tr>
<td>SAML (includes Shibboleth, AD FS, Azure, Google SAML, Okta, etc.)</td>
<td>• SAML 2.0 or above</td>
<td>• Accounts are created automatically when patrons log in to Discovery for the first time</td>
</tr>
<tr>
<td></td>
<td>• Exchange or Shibboleth-related metadata between OCLC and your institution</td>
<td>• Library staff can see patron accounts in WorldShare Admin</td>
</tr>
<tr>
<td>METHOD</td>
<td>AUTHENTICATION REQUIREMENTS</td>
<td>ADDITIONAL INFORMATION</td>
</tr>
<tr>
<td>--------</td>
<td>-----------------------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>Persistent ID which will be presented from Assertion/Subject/NameID from your SAML response OR</td>
<td>• Patrons are greeted with their first name in Discovery upon login</td>
<td>(names and email addresses)</td>
</tr>
<tr>
<td>• If you cannot send a persistent ID in the Subject/NameID, provide the name of an attribute that can be set as a unique, persistent value</td>
<td>• Library staff will not be able to see the patrons' names or email addresses in WorldShare Admin. All accounts will display as &quot;Not Supplied&quot; as the name.</td>
<td>For Azure only:</td>
</tr>
<tr>
<td>• Test account required</td>
<td>• Patrons will not see their first names in Discovery upon login</td>
<td></td>
</tr>
</tbody>
</table>

User self-registration (without a connection to an authentication system)

- You must require a specific, unique value from each patron (could be an institutional username, barcode, student ID, or email address); this value will be used by patrons when logging in.

- Library staff can see patron accounts in WorldShare Admin (names, usernames, and email addresses)

- Patrons are greeted with their first name in Discovery upon login

- Not recommended for libraries considering a move to WorldShare Management Services (WMS)

Note: These logon options are not available to Group Catalogs using WorldCat Discovery.

### Add a link to your library's OPAC

Enable links so that users can go from a search result to an item record in your OPAC. See:

- [Configure links to your online catalog](https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery/Configure_WorldCat_Discovery/Configure_p…)

### Add a patron facing ILL button

WorldCat Discovery supports: WorldShare ILL, Tipasa, ILLiad, and OpenURL-compliant forms (OpenURL 1.0).
1. Sign in to OCLC Service Configuration.
2. Navigate to WorldCat Discovery and WorldCat Local > Place Hold/Request Buttons.
3. Follow the instructions to: Add a button that takes your patrons to your interlibrary loan form.
4. Continue to the next section on this page for instructions to add a proxy and a prompt for patrons’ remote access options.

**Watch a video**

This video demonstrates how to enable and configure the ILL request button in WorldCat Discovery.

Configure an ILL request button in WorldCat Discovery (7:45)

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

**Add a custom chat widget**

If your library offers online reference service, configure your custom links to open a chat widget in a new window when the link or chat area is clicked.

1. Sign in to OCLC Service Configuration.
2. Navigate to WorldCat Discovery and WorldCat Local > User interface options.
3. Enter information for Custom link 1:
   a. Link type: Select library contact info
   b. Display Chat Widget: To display the chat widget for patrons, select Yes.
   c. Do you have a QuestionPoint account?
      ▪ Yes: If you are a QuestionPoint user, your Qwidget can be generated by supplying your QuestionPoint Institution ID in the box provided
      ▪ No: If you are using a different reference service, such as LibAnswers, you can display a different chat widget by pasting a code snippet in the Chat code box provided
         ▪ 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.
         ▪ Display text: Create a custom text label of your choice (limit 24 characters).
         ▪ Click test URL to confirm that the widget appears as desired.

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.