Customize the User Portal

Learn how to customize the User Portal with your library’s branding, logo settings, and custom links. You can customize the look of the user portal by navigating to the WorldCat Discovery and WorldCat Local User Interface Options in the Service Configuration. Use this screen to update your banner and custom links.

Caution: Altering these settings will change the appearance across your WorldCat Discovery interface.

Language Options

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

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

Branding & Customization

<table>
<thead>
<tr>
<th>EXAMPLE</th>
<th>FIELD</th>
<th>HEX VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Color of links and text in the banner</td>
<td>Type the hex value in the field provided, or use the color picker to find a hex value.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Navigational bar color Note: Match this to your logo background color to mimic a screen-width banner.</td>
<td>(example: 002856)</td>
</tr>
<tr>
<td>8</td>
<td>Banner and footer color</td>
<td>(example: 545454)</td>
</tr>
</tbody>
</table>
Logo Settings
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 the User Portal 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.

Type the URL for the page where the user is sent when they click the logo image.

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>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 Discovery.</td>
<td></td>
</tr>
</tbody>
</table>

- Link type: Select library contact info
- Display Chat Widget: To display the chat widget for patrons, select Yes.
- 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 do not have a QuestionPoint account, 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

Custom link: Display Chat Widget

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.
Custom link: A to Z list

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 A - Z List and OCLC Link Resolver. Enter the following URL format: http://[library].on.worldcat.org/atoztitles

Custom link: Proxy

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

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. 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.

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.