Use the Patron Request Workforms screen in OCLC Service Configuration to customize your patron request forms. Patrons can use the patron request forms to request interlibrary loans.

Learn more in a training course: [Patron Management & Notifications](https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/080Patron_Request_workforms)

## Request Types

As a Tipasa user, you have access to four types of request forms:

<table>
<thead>
<tr>
<th>FORM</th>
<th>DESCRIPTION</th>
<th>ACCESSIBLE TO PATRONS FROM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article</td>
<td>The default form allows patrons to request articles.</td>
<td>User Portal</td>
</tr>
<tr>
<td>Book</td>
<td>The default form allows patrons to request books.</td>
<td>User Portal</td>
</tr>
<tr>
<td>Other</td>
<td>The default form allows patrons to request other types of materials (e.g., dissertations, audio visuals). You can customize the form to suit your library’s most requested &quot;other&quot; type of material.</td>
<td>User Portal</td>
</tr>
<tr>
<td>WorldCat Discovery</td>
<td>This form allows libraries with both Tipasa and WorldCat Discovery to create a request form that displays in WorldCat Discovery and allows patrons to place requests for items not held by your library. <strong>Note:</strong> OCLC recommends using the forms available through the user portal and using OpenURL to link</td>
<td>WorldCat Discovery</td>
</tr>
</tbody>
</table>
Note: You will need to substitute your institution's registry ID to customize the direct links. If you have customized your patron request form names, the direct link name will not reflect those changes.

Find your Registry ID:

- Sign in to OCLC Service Configuration
- Navigate to the WorldCat Registry > Identifiers
- Find the Identifier Type WorldCat Registry ID and the associated number

**Article, Book, and Other Forms**

The image below is an example of the Book Request Form. The sections of the form are described below. The Book form is similar to the Article and Other forms, but the WorldCat Discovery form differs in available fields and sections. For more information on the WorldCat Discovery request form, see WorldCat Discovery Request Form.

When you have familiarized yourself with the sections of the form, see Configure Your Patron Request Form for instructions on customizing your request forms.

Note: For an explanation of each available field, please see Patron Request Workform fields.
1. **Preview**

Once you have configured the form, you can preview how it will appear to patrons. To preview the form, click **Preview**.

2. **Display Name**

The Display Name determines how the form button will be labeled for users in the user portal. To edit the Display Name, enter a new **name** in the Display Name field.

3. **In Use**

The In Use field turns the form on or off. Forms will not be available to patrons in the user portal when they are disabled. The default is Enabled. To enable the form, select **Enabled**. To disable the form, select **Disabled**.

4. **URL**

The URL indicates the page where the forms are located. Click the **URL** to view the forms.
5. Section Header

Use the Section Header to assign a title to the section of the request form. Entering a header can help the patron understand the type of information you expect them to input in the fields contained in the section. For example, you can title a section "About My Request" to inform patrons that the following fields will ask for information about the item being requested. To edit the Section Header, enter a new header into the Section Header field.

6. Remove a Section

Use the Remove a Section button to remove the section. Note: You will not be asked to confirm the removal of the section. Before clicking the button, make sure you want the section to be removed. To remove the section, click Remove a Section.

7. Move a section

The arrows allow you to change a section's position on the form. Arrows will only appear in the directions you can move the sections. To move the section up on the form, click the up arrow (↑). To move the section down on the form, click the down arrow (↓).

8. Field

The fields you select determine what appears on the request form. If you have not configured the form yet, default fields will be selected. Note: Only the Note to Patron field can be reused on the forms. All other fields can only be used once. To add a field, see 14. Add a field to display on this Section. To change a field, click the Field list and select a new field. To delete a field, see 13. Remove (delete) a field.

For an explanation of each available field, please see Patron Request Workform fields.

9. Input Type

The Input Type displays how the patron inputs information into the field. Input type is fixed for each field.

10. Field Labels

The Field Label determines how the field is described on the form. Each field has a default field label. Use the field label to provide patrons with a description of the information you would like them to input in the field. For example, Patron Max cost could be relabeled to Max cost I am willing to pay. Note: Field labels are limited to 30 characters. To edit a field label, enter a new label in the Field Label.

11. Field Values

Field Values can be used to enter default text or options that will appear on the form to the patron. For example, you may enter a value for Patron Max cost to let patrons know the maximum amount charged for any item. If the Input Type is dropdown, you can select the default selection from the list, or depending on the field, you can enter your own values to appear in the dropdown. If the Input Type is textentry, you can enter default text in the field.

12. Options

Options allow you to further define the fields on your form. By selecting an option, you can make fields required or editable.

- Select the Required check box if you want the field to be required. When a field is required, patrons must provide information in the field in order to submit the form. Patrons will encounter an error if they try to submit the form without filling out all required fields.
• Deselect the **Required** check box if you do not want to the field to be required. When a field is not required, patrons do not have to fill in the field.

• Select the **Editable** check box so that patrons can edit the field. Most fields should be editable.

• Deselect the **Editable** check box if you do not want patrons to edit the field. You can enter a value in the **Field Values** that patrons cannot edit.

13. Remove (delete) a field

Use the **remove icon** to remove a field from the section. **Note:** You will not be asked to confirm the removal of a field. Before clicking the remove icon make sure you want the field to be removed. To remove a field, click the **remove icon** to remove a field from the section.

14. Add a field to display on this Section

Use the Add a field to display on this Section button to add another field to the section. To add a field to the section, click **Add a field to display on this Section**.

15. Add a Patron Section

Use the Add a Patron Section button to add a Patron Section to the form. See **Patron Section Fields** for a description of each field in the Patron Section. To add a patron section, click **Add a Patron Section**.

16. Add a Bibliographic Section

Use the Add a Bibliographic Section button to add a Bibliographic Section to the form. See **Bibliographic section fields** for a description of each field in the Bibliographic Section. To add a bibliographic section, click **Add a Bibliographic Section**.

17. Reset to Standard Form

Use the Reset to Standard Form button to reset the form to the default (non-customized) version of the form. To reset the form, click **Reset to Standard Form**.

18. Save and Cancel

Once you have completed editing the form, you can save or cancel your changes. To save the form, click **Save**. To cancel your changes, click **Cancel**.

**WorldCat Discovery Request Form**

**Tipasa libraries:** Patron requests created from this form cannot be tracked and displayed in the user portal. OCLC recommends you use the **Article, Book, and Other Forms** available in the user portal and configure your WorldCat Discovery interlibrary loan requests to be sent via OpenURL to the user portal forms. For more information on configuring your resource sharing button in WorldCat Discovery, see Before you begin: **WorldCat Discovery and WorldCat Local libraries only.**

For WorldShare Interlibrary Loan libraries, use this screen to customize the WorldCat Discovery Request Form. This request form displays to your patrons in WorldCat Discovery. The image below is an example of the WorldCat Discovery Request Form. The sections of the form are described below.
1. Preview

Once you have configured the form, you can preview how it will appear to patrons. To preview the form, click **Preview**.

2. Section Header

Use the Section Header to assign a title to the section of the request form. Entering a header can help the patron understand the type of information you expect them to input in the fields contained in the section. For example, you can title a section "About My Request" to inform patrons that the following fields will ask for information about the item being requested. To edit the Section Header, enter a new **header** into the Section Header field.

3. Remove a Section

Use the Remove a Section button to remove the section. Note: You will not be asked to confirm the removal of the section. Before clicking the button, make sure you want the section to be removed. To remove the section, click **Remove a Section**.

4. Move a section

The arrows allow you to change a section's position on the form. Arrows will only appear in the directions you can move the sections. To move the section up on the form, click the **up arrow** (↑). To move the section down on the form, click the **down arrow** (↓).
5. Field

The fields you select determine what appears on the request form. If you have not configured the form yet, default fields will be selected. Note: Only the Note to Patron field can be reused on the forms. All other fields can only be used once. To add a field, see 11. Add a field to display on this Section. To change a field, click the Field list and select a new field. To delete a field, see 10. Remove (delete) a field.

6. Input Type

The Input Type displays how the patron inputs information into the field. Input type is fixed for each field.

7. Field Label

The Field Label determines how the field is described on the form. Each field has a default field label. Use the field label to provide patrons with a description of the information you would like them to input in the field. For example, Patron Max cost could be relabeled to Max cost I am willing to pay. Note: Field labels are limited to 30 characters. To edit a field label, enter a new label in the Field Label.

8. Field Values

Field Values can be used to enter default text or options that will appear on the form to the patron. For example, you may enter a value for Patron Max cost to let patrons know the maximum amount charged for any item. If the Input Type is dropdown, you can select the default selection from the list, or depending on the field, you can enter your own values to appear in the dropdown. If the Input Type is textentry, you can enter default text in the field.

9. Options

Options allow you to further define the fields on your form. By selecting an option, you can make fields required or editable. Select the Required check box if you want the field to be required. When a field is required, patrons must provide information in the field in order to submit the form. Patrons will encounter an error if they try to submit the form without filling out all required fields. Deselect the Required check box if you do not want to the field to be required. When a field is not required, patrons do not have to fill in the field. Select the Editable check box so that patrons can edit the field. Most fields should be editable. Deselect the Editable check box if you do not want patrons to edit the field. You can enter a value in the 8. Field Values that patrons cannot edit.

10. Remove a field

Use the remove icon to remove a field from the section. Note: You will not be asked to confirm the removal of a field. Before clicking the remove icon make sure you want the field to be removed. To remove a field, click the remove icon to remove a field from the section.

11. Add a field to display on this Section

Use the Add a field to display on this Section button to add another field to the section. To add a field to the section, click Add a field to display on this Section.

12. Add a Section

Use this button to add another section to the form. To add a section to the form, click Add a Section.

13. Reset to Standard Form

Use the Reset to Standard Form button to reset the form to the default (non-customized) version of the form. To reset the form, click Reset to Standard Form.
14. Save and Cancel

Once you have completed editing the form, you can save or cancel your changes. To save the form, click **Save**. To cancel your changes, click **Cancel**.

**Watch a video**

Configuring patron-initiated requests for WorldCat Discovery (8:50)

Learn how to configure patron-initiated ILL requesting for WorldCat® Discovery to allow your patrons to search and identify items, then initiate requests.

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