

WorldCat Discovery Configuration

Content and Staff Features

Through the OCLC Service Configuration, you can set up content, add patron-facing features as well as staff features to your WorldCat Discovery interface. This document provides brief information with links to documentation and online tutorials to support your configuration work.

Logon to the **OCLC Service Configuration** here: <http://worldcat.org/config>

WorldCat Registry to confirm, modify or add institution information:

Verify **WorldCat Registry** settings for Name and Location and Map to ensure that your location displays correctly on the Map and that holdings are represented correctly.

- Go to **WorldCat Registry > Name and Location** to get started.
- View **WorldCat Registry > Map** to verify the location on a map.

Add Online Catalog links:

Verify the Online Catalog links to connect your patrons and staff to your local catalog to view the local call number and shelf status for items they are seeking.

- Go to **WorldCat Registry > Online Catalog Links** to get started.
- The **Suggest Links** feature will automatically generate URL syntaxes for many vendors and online catalog products. These suggested links appear in the search by ISBN, search by ISSN and search by OCLC Number sections.
- Use the Test button to verify that the suggested links work as expected in your local catalog. You may substitute your own ISBN, ISSN or OCLC number for the suggested ones; this ensures that the item is part of your library's collection.
- Tutorial: [Configure links to your library's online catalog](#)
- Documentation: [Linking from search results to your OPAC](#)

Confirm, update IP Addresses:

- Verify or add IP Address information so patrons and staff can access licensed content and databases and so that patron-created ILL Requests will be routed correctly to your library.
- Information needed: IP Address(es); 9-digit FirstSearch authorization number: OCLC Symbol
- **NOTE:** The following addresses are **never used** on the Internet;
- **Do NOT** include these in your list of IP addresses for IP-address recognition:
 - 10.*.*
 - 127.*.*
 - 172.16.*.* through 172.32.*.*
 - 192.168.*.*

Go to **IP Addresses > Manage IP Addresses** to get started.

Documentation: [Manage IP Addresses](#)

Customize the user interface


Customize your WorldCat Discovery site with your library's branding, logo, custom links and other general display settings.

- Go to **WorldCat Discovery and WorldCat Local >User Interface Options** to get started.

Set up WorldCat.org redirect

Under Your WorldCat.org URL, set up a redirect from Worldcat.org to your WorldCat Discovery URL. This will help a patron or staff member who starts a search on WorldCat.org or links to a detailed record, see a pop-up box directing them to your library's custom WorldCat Discovery web address.

The redirect can also be used to direct patrons and staff from WorldCat Local permalinks to WorldCat Discovery. No edits to the WorldCat Local permalinks are needed for this to occur. But, bookmarks that are not specifically permalinks do need to be updated manually.

WorldCat Discovery URL	https://ts259.on.worldcat.org <small>This option only applies to current WorldCat Local/WMS subscribers</small>
Institution Name *	Training Library <small>Refer to the Relevance & Scoping module to configure the institution name.</small>
WorldCat.org Redirect	<input type="checkbox"/> Redirect users from open WorldCat.org to your institution's WorldCat instance
 Select an option to redirect users to your WorldCat Local or WorldCat Discovery URL upon reaching a record on www.worldcat.org .	<input type="radio"/> Redirect to WorldCat Local instance <small>https://ts259.worldcat.org</small>
	<input checked="" type="radio"/> Redirect to WorldCat Discovery instance <small>https://ts259.on.worldcat.org</small>
	<input checked="" type="checkbox"/> Redirect WorldCat Local permanent and bookmarked links to WorldCat Discovery

Set up databases to search


Configure your default databases and licensed content so patrons and staff will be able to find items from OCLC databases and from a central index of databases in a single, relevancy-ranked results set. Documentation: [Available collections and databases list](#)

- Start at **Metasearch Content > Default databases and licensed content**.
- Under the panel, **configure databases to search**, select the databases to which your library subscribes. These include OCLC databases, those part of the central index and those available through the remote databases option.
- Under the panel, **group configured databases**, organize the databases into topic groups, core collections, or other groupings appropriate for your patrons and staff.
- Once groups are set, select a default database or group.

Default Databases and Licensed Content

Required fields are marked with an asterisk (*)

Users may search any selected database from Advanced Search in WorldCat Discovery.

- Please select at least one database. Errors occur in WorldCat Discovery if no databases are selected.
- We recommend selecting WorldCat.org from OCLC Licensed Databases if you are unsure about your subscriptions.
- Apply your selections by clicking the save button at the bottom of this page.
- [Refer to the available collections and database list from OCLC Documentation](#) 

Configure Databases to Search

Group Configured Databases

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- When finished, click **Save Changes** in the lower right corner to store these selections.

Configure full text and open access links

Configure links to your e-content so your patrons and staff can easily locate and view these items. Go to **WorldCat Discovery and WorldCat Local > Full text and open access links** to get started.

- Use the **WorldCat knowledge base** to set up your licensed e-content collections. Access to WorldShare Collection Manager is part of a cataloging subscription.
- Go to **Metadata Services > [WorldShare Collection Manager](#)** for more information.
- Add **links from master WorldCat records' 856 fields**. These links come from content that is presumed to be open access based on the domain extension (i.e. ends in .edu or .gov) or on the source (i.e. Internet Archive). All the links are checked by default; review these and uncheck the boxes beside any link sources that you do not wish to display.
- **Enable DOI full text links**. DOIs will inform Access Online on search results, detailed records, and Course Reserves. DOI's are compared to Unpaywall data to ensure that only DOI's leading to open access content display. If a DOI is not present in Unpaywall, then the Access Online button will not display, but the DOI will appear in the Description of detailed records. DOIs display on both WorldCat and non-WorldCat records as a primary link when a matching Unpaywall DOI exists.

More information about DOIs can be found in WorldCat Discovery release notes for [October 18, 2018](#).

Direct your patron feedback to your library

Configure an email address where feedback from your library patrons can be directed.

The feedback link, found in the lower right corner of WorldCat Discovery interface, displays a patron form. There are required fields to ensure that proper follow-up can be provided by your library staff. To receive a copy of all feedback for your library, click the check box 'Send a copy of all emails to me'.

Library staff can use a version of this form with additional data elements to submit comments to OCLC. At the top of the form is some general information, a link to report bibliographic errors, and a link to WorldCat Discovery support documentation.

Start at **WorldCat Discovery and WorldCat Local > ILS Support and Maintenance > User Support**.

Report a broken link

Configure an email address where library patrons can report broken links.

The report broken link can be found under **Availability > Other links** and on the A-Z list.

The form that displays asks for the patron's name and email address, with a checkbox to request feedback so library staff can follow-up with a corrected link.

When patrons submit a "Report a Broken Link" in WorldCat Discovery or the A to Z list, a confirmation message confirms that the action was successful. To ensure institution-specific policies such as following up in a specific timeframe are displayed to these patrons, an institution-configured confirmation message can display.

OCLC receives the link metadata report but no patron information. Library staff can use a version of this form that removes the required fields and only sends an automated report to OCLC for analysis. There is no follow up with this action.

Go to **WorldCat Discovery and WorldCat Local > ILS Support and Maintenance > User Support** to enable this link and customize the message.

WorldCat Discovery accounts

Library staff can create accounts for staff-specific features in WorldCat Discovery by adding WorldCat Discovery to an existing WorldShare account or by creating an account for WorldCat Discovery only.

Staff Features in WorldCat Discovery include the ability to:

- See OCLC numbers in search results and item details
- See OCLC symbols of holding libraries under Check availability
- Use the MARC record link in the item detail to view this record (cataloging subscription needed)
- See Staff ILL button (WorldShare ILL libraries)
- Create, save and share personal lists and searches

To edit roles or manage accounts, please refer to [WorldShare User Management](#)

Patrons do not need accounts to search and display results in WorldCat Discovery.

Patrons at WMS libraries have accounts already to manage their circulation materials, place holds, and now to save searches and lists.

Libraries (at non-WMS sites) may offer their patrons the ability to create accounts so they can save personal lists and searches. Separate authentication is still needed to be able to view licensed content and other e-resources.

If you are interested in this feature for your patrons, complete the registration form found at this link: https://registration.oclc.org/reg/?pc=WCD_logon . OCLC implementation staff will work with you to activate this using either an OCLC method that supports self-creation of authenticated accounts or by using your existing accounts with an OCLC link to your institution's authentication service, if compatible.

Support Resources:

[WorldCat Discovery documentation](#) has details about configuration, searching and other features.

Visit the [Community Center](#) to engage in discussions, learn about updates, submit enhancement requests or review those suggested by others.

Contact [OCLC Customer Support in your region](#).

In the USA, email to: support@oclc.org or phone: 800-848-5800.