

WorldCat Discovery Configuration

Content and Staff Features

Through the OCLC Service Configuration, you can set up links to your online catalog, provide access to a variety of databases, add a fulfillment link, and offer a sign-in process for both patrons and staff. This document provides information with links to documentation to support this 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.
- Documentation: [Configure links to your online catalog](#)

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.

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

Set up colors, branding and logo settings

Under Branding and customization, select a hex code color matching your institution's color scheme.

Add a secondary color in place of the default grey navigation bar. This navigation bar is under the banner, where the links to "Course Reserves" "ask a librarian Chat" and My Items are located.

For your logo, add a URL in https format for this image. You can enter alternative text that displays when your users hover over the image and a link that directs them to your homepage or other local site.

Home page URL: https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery

- Alternative text: WorldCat Discovery documentation

Or

- Home page URL: <http://www.oclc.org/>
- Alternative text: Visit the library page

Add custom links to WorldCat Discovery

Under Custom links, you can set up links to your library contact information, a chat service, and other sites, such as for remote sign in or a link to an A to Z list for available e-resources.

Display a chat widget in custom link 1

Add the chat widget code so patrons can use your Ask a Librarian service in WorldCat Discovery. Once configured, the link will appear in the banner on every screen. OCLC requires the use of a secure https:// protocol for the chat links that are entered here.

- Go to Custom Link 1 and select "library contact information" from the list
- If you use Question Point, enter the Question Point User ID in the space provided. This service uses a secure https:// protocol.
- For a different chat service, enter chat code snippet and display text in the boxes provided. These chat widgets are required to be invoked via a secure https:// protocol.

Add proxy and a prompt for remote access options in custom link 3

Add proxy information so library users can be authorized to use your library's licensed e-content and place interlibrary loan requests for items not held by your library. When a resource is selected that requires remote authentication, users will see a box that prompts them to sign in.

- Go to Custom Link 3 and select "remote access login" from the list
- Enter the proxy landing page URL in the space provided.
- Check the box next to "**Append current URL to the end of this link**"
- Add text to display under **Resources** that explains this link.

When finished, click **Save Changes** in the lower right corner. This stores your settings and implements them at your WorldCat Discovery site.

Add link to an A – Z list for eResources

If your subscription includes access to the WorldCat knowledge base you can add a link to the A - Z list as part of the A-Z list and OCLC link resolver.

NOTE: If you navigate away from the Custom Links, you will be prompted to Save Changes. Confirm this action so your settings are saved here before navigating to the A – Z list and OCLC link resolver. Once you save your changes, then proceed as follows:

- To obtain this link resolver base URL, open **A-Z list and OCLC link resolver**.
- Copy OCLC link resolver base URL up to “atoztitles”. Do not copy **/link** at the end of the URL.
- Return to **User interface options** and open the Custom links panel.
- Select **Custom Link 2** and select “other” from the link type drop-down list
- In the URL space, paste the link resolver URL
- Add text to display under **Resources** that explains this link.

When finished, click **Save Changes** button in the lower right corner.

Display links to other resources

Configure other links to direct your users to support sites or other resources, such as:

- Book lists
- Special collections
- Subject guides
- Suggest a purchase

For each link, provide the URL, and display text.

- Select the link type from the list presented. Use **Other** if your link does not fit specific suggestions.
- In the URL space, add the URL for the resource
- Add text to display under **Resources** that explains this link
- **Test** the link to make sure it works as expected
- When the link works as expected, click **Save Changes** to store the settings

Set up databases to search

Configure your default databases and licensed content so users 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**.

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

- Open the panel, **Configure databases to search**, select the databases to which your library subscribes. The first tab, Selected databases, lists the databases configured for your site.
- Open the tab, **OCLC databases**. These databases are included as part of your subscription. Review the list and select the databases to make available in your Discovery instance.
- Open the tab, **Central index databases**. Choose databases from this list to which your library has active subscriptions. Use to search box to locate specific databases.
- Open the tab, **Remote databases**. These databases reside on the content providers' sites and are available in WorldCat Discovery through a federated search. Proxy information and the library's username and password are needed to set up access to these databases.

Configure Databases to Search

Select databases or collection sets to which your institution has a current, active subscription.

Selected Databases 23 Selected OCLC Licensed Databases 11 Selected Central Index Databases 9 Selected Remote Databases 3 Selected

Selected Databases are selected by your institution to allow library user searching. This is the list you may group together to make a group of databases.

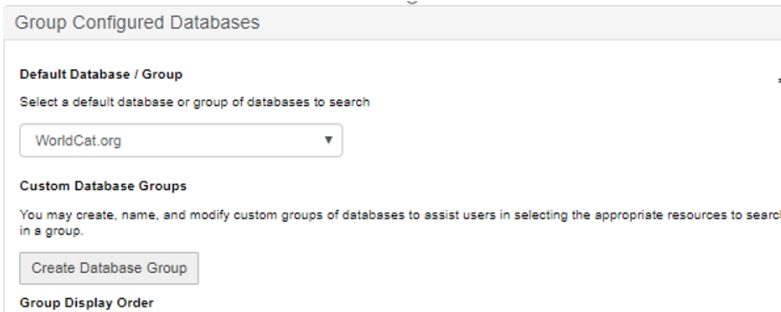
Type name to limit database list display

Name

Enabled Databases for Searching

WorldCat Discovery configuration for content and staff features

- Under the panel, **Group configured databases**, organize the databases into topic groups, core collections, or other groupings appropriate for your users and staff.
- Once groups are set, select a default database or group.



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

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.

Add a patron facing ILL request button

- Configure the Patron Request Item button so patrons and staff will be able to place ILL requests for items not held in your library. Links may be set up for WorldShare Interlibrary Loan (WS ILL) or to an Open URL service such as ILLiad.
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- Go to **WorldCat Discovery and WorldCat Local >Place hold / Request button** to get started.
- Tutorial: [Customize your ILL request button](#) Documentation: [Customize your ILL request button](#)

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.

WorldCat Discovery – Modernized view:

A modernized view of WorldCat Discovery is under development. Visit the Community Center at this link for details: <https://oc.lc/community-modern>

To preview access to this modernized view, add **/v2** to the end of your WorldCat Discovery custom web address: [https://\[YOURLIBRARY\].on.worldcat.org/v2](https://[YOURLIBRARY].on.worldcat.org/v2)

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

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