

# 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>

### Basic configuration options –

#### 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.org Redirect

- ☒ Redirect to WorldCat Local (<https://ocltraining-tsf.worldcat.org>)
- ☐ WorldCat Discovery at [ocltraining-tsf.on.worldcat.org](https://ocltraining-tsf.on.worldcat.org)
- ☒ Redirect WorldCat Local permanent/bookmarked links to WorldCat Discovery (<https://ocltraining-tsf.on.worldcat.org>)

## Configure general display settings

Enable the display **link to Editions & Formats** on search results.

Enable the **display of alternate formats** on search results and the physical availability on electronic records (for WMS libraries and others that have real-time availability).

For libraries using WorldShare Management Services (WMS), enable the use of **Course Reserves** and **Display shelf browse on detailed records**.

## 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 to appear when your patrons or staff hover over the image and link a URL for your library's home page or a support site. Often the hover text explains the URL link, such as

- Home page URL: [https://help.oclc.org/Discovery\\_and\\_Reference/WorldCat\\_Discovery](https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery)
- Alternative text: WorldCat Discovery documentation.

Or

- Home page URL [Example]: <http://www.columbuslibrary.org/>
- Alternative text [Example]: Search the catalog at the Columbus Metropolitan Library

## 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 a remote access sign in link or a link to an A to Z list of available e-resources.

### Display a chat widget

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
- For 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 patron remote access options

Add proxy information so patrons can 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, patrons 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 Library Links that explains this link.

Custom link 4 is used for patrons at libraries using WorldShare Management Services (WMS).

## Add A – Z list link

If your subscription includes access and holdings for 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:** Be sure to click Save Changes in lower right corner to save your settings before opening 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 Library Links that explains this link.

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

## 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.

## 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](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:

[Register](#) to obtain your library's WorldCat Discovery custom Web address.

[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](mailto:support@oclc.org) or phone: 800-848-5800.