

# 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, configure links to full-text and open access items as selected in the WorldCat knowledge base, and offer a sign-in process for both your library's users 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

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.
- Go to **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.
- Enter the appropriate ISBN, ISSN, or OCLC number link URL in the spaces provided.
- NOTE: These are one-try links. If the records in your catalog do not have OCLC numbers consistently present and formatted, prefer the ISBN and ISSN links and leave the OCLC numbers link field blank.
- 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.
- When satisfied that the links work as expected, click Save to store these settings.
- 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](#)

## Configure 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 by name or provider.
- 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 your 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

- Under the panel, **Group configured databases**, organize the databases into topic groups, core collections, or other groupings appropriate for your users and staff.

Database Group Name\*

Quick Search

Select Databases  
Select up to 50 remote databases. No limit exists for OCLC and Centrally Indexed databases.

- Applied Science & Technology Abstracts
- ERIC
- GPO Monthly Catalog
- Library, Information Science & Technology Abstracts (LISTA)
- WorldCat
- iInforme!
- African American Experience
- American Government
- American History
- American Indian Experience

Remove

- Once groups are set, select a default database or group.

- 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 users and staff can easily locate and view these items. Open **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 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 (digital object identifier) inform Access Online on search results, detailed records, and Course Reserves. These identifiers 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 appears 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.

## Direct feedback from your library users back to your library

The feedback link, found in the lower banner of WorldCat Discovery, displays this form.

You can configure an email address where this feedback from your library users is directed. Enter these email addresses under **WorldCat Discovery and WorldCat Local > ILS Support and Maintenance > User Support**.

There are required fields to ensure that proper follow-up can be provided by your library staff. To receive a copy of feedback for your library, check the 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. The top of the form contains general information, a link to report bibliographic errors, and a link to WorldCat Discovery support documentation.

## Report a broken link

Configure an email address where library users can report broken links. You may use the same email addresses here that are set up for the feedback form or use different ones in these spaces.

Report a broken link displays on search results with the link, or in the Item detail where these links display and on the A-Z list.

The form has spaces for the user's name and email address, with a checkbox to request feedback so library staff can follow-up with a corrected link.

When the form is submitted via "Report a Broken Link" in WorldCat Discovery or the A to Z list, a message confirms that the action was successful. An institution-configured confirmation message such as follow up timeframes can be set to display.

OCLC receives the link metadata report but no library user 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 for this action.

## Enable search history and save searches

Search history allows users to view their recent searches executed in a single browsing session. These searches are saved temporarily.

To enable search history in the Service Configuration, navigate to **WorldCat Discovery and WorldCat Local** > [Display Settings](#)

Expand **Search History**:

1. Select **Enable Search History**.
2. You may use the default text, **Search history**, or enter custom text to display.
  - Add your custom text to **Display Text**.
    - There is a 25-character limit.
  - Be aware that the custom text only displays in the navigation bar. **Search history** will continue to display on the Search history page and the footer.
3. Click **Save**.

## Use search history

Perform a few searches, then click **Search history** in the navigation bar or footer. This displays these searches and other details, such as the filters applied, databases searched.

From here, you can re-run the search by clicking the search terms. You can delete the search or share the search with others.

Library users and staff with accounts, can save any of these searches. Once signed-in, an action drop-down list displays within each search line. From that action list, select Save search. WorldCat Discovery will store the most recent 100 searches to a user's account. Refer to [Saved search](#) for more information.

## WorldCat Discovery accounts for library users

Library users in general do not need accounts to search and display results in WorldCat Discovery.

Sign-in options display to library users at libraries with WorldShare Management Services (WMS) subscriptions or at libraries with WorldCat Discovery Premium subscriptions. These library users have accounts so they can sign-in to place holds (WMS libraries), save personal lists and searches.

Group catalog subscribers do not see an option to Sign-in.

FirstSearch/WorldCat Discovery subscribers see a Staff Sign-in only. These libraries can offer account creation to their users so they can save personal lists and searches.

If you are interested in this feature for your patrons, complete the registration [form](#). 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.

## WorldCat Discovery accounts for library staff

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 “Other libraries worldwide”
- 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

Contact your library’s WorldShare system administrator to add WorldCat Discovery to an existing WorldShare account or to obtain a new account for WorldCat Discovery.

## Alternate subject headings

The WorldCat Discovery Equity, Diversity, and Inclusion (EDI) initiative aims to reduce harm in item descriptions. Use a universal template provided by WorldCat Discovery to locally re-map subject headings to hide sensitive language in the WorldCat Discovery interface.

This feature enables the ability to locally re-map subject headings to hide sensitive language and facilitate a more inclusive experience for your library users and staff.

WorldCat Discovery offers a Local subject re-mapping template in the [documentation](#). Download and edit this template to meet your local needs.

Then, navigate to the Service Configuration to enable this option and upload the template. Remapped subject headings will then appear in WorldCat Discovery at your custom web address. A notification message can be configured to alert your users if a remapped heading is used for further searching. heading has been replaced

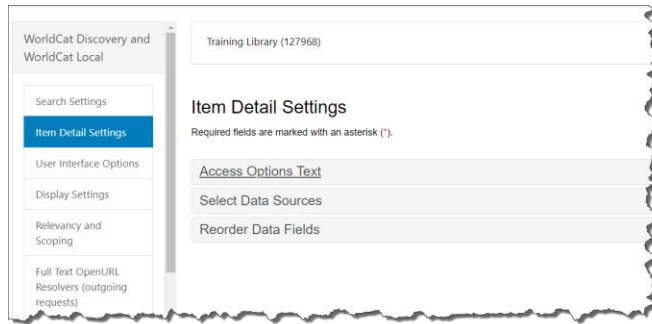
To recap, follow these steps:

1. Access the Local subject re-mapping template
2. Download and edit the headings to meet local needs.
3. Sign-in to the Service Configuration at <https://worldcat.org/config>
4. Open WorldCat Discovery and WorldCat Local > Search settings > Alternate subject headings
5. Enable this feature to activate other fields in this panel
6. Upload the file here. Only one file can be uploaded and, the file cannot be downloaded.
7. Determine the notification message by using the default or creating a custom message.
8. Click Save to store these settings.

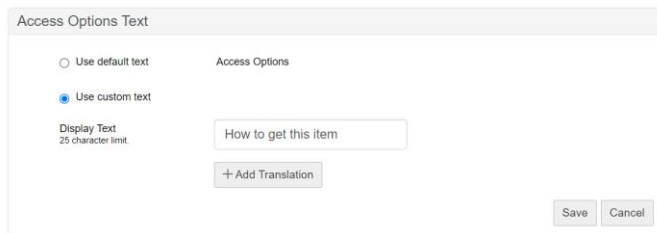
## Item detail settings

The item detail settings allow you to customize the Access Options display text that appears on the item detail in WorldCat Discovery and to manage how the WorldCat record and local bibliographic (LBD) data field display on your item description.

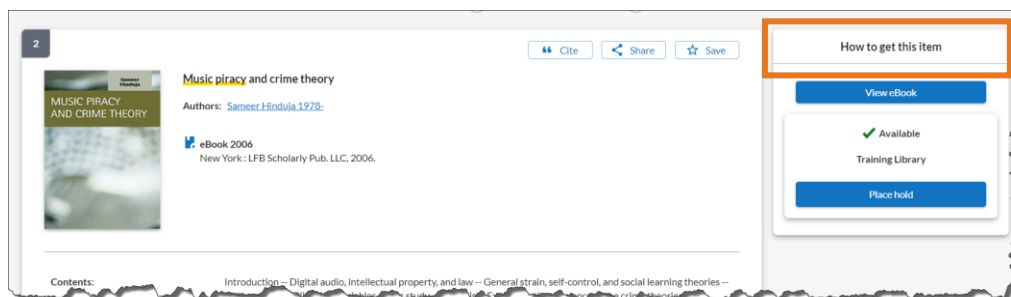
Configure these settings under **WorldCat Discovery and WorldCat Local > Item detail settings**.



To customize the display text, open the Access options text panel. Use default text is checked automatically. Check Use custom text and enter the text to display. Click Save to store your changes.



On the item detail, the custom Access options text appears here:



The ability to organize how the WorldCat record and local bibliographic (LBD) data fields display under item description is available to WorldShare Management Services libraries, libraries with WorldCat Discovery premium subscriptions and group catalogs. This configuration includes the order of the fields and their labels. Content within each field displays using standard formatting rules.



Open Select data sources to verify that LBD information will display. Next, open Subject heading vocabularies to choose the ones to display in your item details. Click Save to store your selections.

Open Reorder data fields to select ones to promote to view and others to demote from view. These settings offer more control over how local bibliographic data (LBD), subject heading vocabularies, and local holdings records (LHRs) display in your WorldCat Discovery instance. The fields can be re-ordered so the ones that present relevant information for library users appear higher in the display and other fields of lower priority to users or specific to library staff appear lower. All fields in the record remain available when “show more details” is clicked.

FirstSearch/WorldCat Discovery libraries (those not using WMS or WorldCat Discovery premium) see the item details in a default arrangement.

Consult the documentation [here](#) in the **OCLC Service Configuration Guide > WorldCat Discovery and WorldCat Local > Item detail settings**.

## Content and Staff Features – Knowledge Check

Check your knowledge about how to configure library settings such as, IP addresses, databases and full-text links, feedback forms and staff accounts.

1. In the WorldCat Registry:
  - a. I can set up my library's IP addresses.
  - b. I can update my library's address, map location and online catalog links.
  - c. I can order coffee.
  - d. I can configure an online database.
2. When configuring the online catalog links:
  - a. Both the direct to ISBN and the direct to OCLC number links should be entered.
  - b. Only the direct to ISBN link should be entered.
  - c. Either the OCLC number link or the ISBN link should be entered based on the presence of the OCLC number in your library's records.
  - d. Only the direct to OCLC number link should be entered.
3. Your IP addresses are used to "recognize" searchers as being affiliated with your institution.
  - a. True
  - b. False
4. Under Metasearch Content:
  - a. I can adjust my library's latitude/longitude map coordinates.
  - b. I can configure access to WorldCat knowledge base collections.
  - c. I can select databases to search and group them by topic, function, or access method.
  - d. I can get help writing a research paper.
5. Where do you configure full text links to display in WorldCat Discovery?
  - a. Full Text OpenURL Resolvers
  - b. Full Text and Open Access Links
  - c. Place Hold/Request Buttons
  - d. Relevancy and Scoping
  - e. User Interface Options
6. In the Service Configuration, (check all that apply)
  - a. I can offer sign-in capabilities to my library users.
  - b. I can set up an email address to receive broken link reports from library users.
  - c. I can renew my driver's license.
  - d. I can set up an email address to receive customer feedback.
7. The Item Detail settings allow libraries to display fields with information relevant to end users and to remove fields that contain information that is not as important to these users.
  - a. True
  - b. False

## Support Resources:

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

Visit the [Community Center](#) at to participate in discussions or view other resources about WorldCat Discovery.

With questions or further assistance, please contact OCLC Customer Support in your region: <https://oc.lc/support-regions>

## Knowledge check -- Answer key

1. b -- I can update my library's address, map location and online catalog links.
2. c -- Either the OCLC number link or the ISBN link should be entered based on the presence of the OCLC number in your library's records.
3. a -- True
4. c -- I can select databases to search and group them by topic, function, or access method.
5. b -- Full Text and Open Access Links
6. b -- I can set up an email address to receive broken link reports from library users.  
d -- I can set up an email address to receive customer feedback.
7. b -- False