OCLC
WorldCat Discovery
Administration

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When contacting OCLC be sure to have your OCLC Symbol handy.
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Setting up WorldCat Discovery

To set up your access to WorldCat Discovery follow these steps:

Step 1 Go to http://www.oclc.org/en-US/worldcat-discovery/migration.html and in the gray box on the right Click the Blue button that reads, “Register to get your WorldCat Discovery URL”.

Step 2 Complete the information on the “Start your transition” form and submit the form. You will receive a “Thank you for Registering…” message.

Step 3 A Registration confirmation for WorldCat Discovery Services will be sent via email. This email states that you will receive a personalized welcome letter within the next 2-5 business days that will include specific information for your library.

Step 4 When the letter arrives via email with your WorldCat Discovery Welcome Materials it will tell you the following—

- Your unique URL for using the service.
- Information about Customizing your WorldCat Discovery. This includes a link to a document that will walk you step-by-step through the customization. They also include your OCLC Service Configuration User Name

To assist you OCLC has established open office hours to help you configure your WorldCat Discovery settings in Service Configuration. http://www.oclc.org/support/services/discovery.en.html

Additional training, support and information can be found at the following links:

For instructor led courses, recorded training courses, and Tutorials go to this link http://www.oclc.org/support/training/portfolios/discovery/worldcat-discovery.en.html
For printed documentation use this link. http://www.oclc.org/support/services/discovery/documentation.en.html

The Getting started with WorldCat Discovery page, located here http://www.oclc.org/support/services/discovery/documentation/getting-started.en.html

Note: When you register for WorldCat Discovery the person completing the form is automatically added to the WorldCat Discovery listserv. An email message about this listserv is sent at the same time as the welcome materials.
Joint WorldShare ILL and WorldCat Discovery Accounts

When libraries that use WorldShare ILL migrate to WorldCat Discovery, the WorldShare staff accounts can be upgraded and configured for the Staff view of WorldCatDiscovery. To do this, the person with the WorldShare ILL Admin account should do the following:

Send an email to orders@oclc.org

Message:

I already use a WorldShare application. Please configure staff accounts for the WorldCat Discovery interface for:

- Institution name:
- Library Symbol or WorldShare URL:
- Personal account information
  - First and last name:
  - The existing username for the WorldShare application:
  - Email address:

For each additional staff member that needs both WorldShare and WorldCat access add:

- Other Staff members’ personal account information
  - First and last name:
  - The existing username for the WorldShare application:
  - Email address:

If you have staff members who will only be using WorldCat Discovery for searching or if you would like a location specific account such as at the Reference Desk. You can create these individual accounts by doing the following:

1. From your WorldCat Discovery URL page, click on the “Sign in” link in the upper right hand corner.
2. Click on the “Create new account” link on the Sign in screen.
3. Enter your FirstSearch authorization and ADMIN password, Confirm Institution and create your new account then click the “Create Account” button. Remember to make note of your username and password.
4. You will see a New Account success message, “Your account has been created. Please close this window and log in with your new username and password”.
5. When logged into the staff view, the “Sign In” link in the upper right hand corner will change to “Sign Out”.
6. When you are ready to sign out of the staff view of WorldCat Discovery, click on the “Sign Out” link in the upper right corner.

If you have any problems in creating the search only accounts, contact orders@oclc.org for assistance.
OCLC Service Configuration/WorldCat Registry

Every library that is a full member of OCLC should have access to the OCLC Service Configuration/WorldCat Registry. With the new WorldShare ILL and WorldCat Discovery services, libraries need to access the Service configuration/Registry to set up these services to full advantage.

If an account has never been set up for your library go to www.worldcat.org/config. In the Upper right corner click on the “Create an account” link. Only one (1) account needs to be set up for the library. Follow the directions on the screen. You will be creating a new username and password, so write them down so you can remember them. Once you have your account you can sign into the Service Configuration.

The screen shot below is where you select if you want the full Service Configuration/Registry or just the WorldShare ILL configuration.

If you cannot create an account or if you are unsure if an account was previously set up. Send an email to orders@oclc.org.

Tell them that you are not sure if you have an account but that you need access to the Service Configuration/WorldCat Registry. Give them the library name and symbol, your name and your email address. They will respond by email with the user name of the account and a temporary password. Go to worldCat.org/config, Click on the arrow in the “Sign in to Service Configuration” box.

Put in the username and password, once in you can change the password to something that might be easier to remember than the temporary one.

Once you have access to the Service Configuration/Registry you can begin to update information and customize your WorldCat Discovery interface.
Linking Online Catalog

One aspect of the customizing is deep linking the Polaris Opac links. You may have already established these links. Documentation on how to do this linking with the Polaris Pac can be found here “Linking Your Catalog for WorldShare ILL”

http://illinoisheartland.org/?q=content/page/linking-your-catalog-worldshare-ill

Follow the instructions given there. Here are some screen shots on the Service Configuration so you know where to find the correct place to enter your links.

Service Configuration home page. Click on WorldCat Registry.

On the WorldCat Registry menu, select Online Catalog.
This is the Online Catalog page where you will enter the linking data from the instructions.
Customizing WorldCat Discovery

Once you have your WorldCat Discovery URL you can begin customizing the interface. This customizing included:

- Adding your logo and colors
- Manage links to content from master WorldCat records
- Set up searchable content and databases
- Create a group of databases for use in default searching
- Review your library’s information in the WorldCat Registry & configure deep OPAC links
- Manage IP addresses
- Use OCLC’s HTML to add a search box to your website.

WorldCat Discovery settings: Customize your interface and searchable content is the name of the document that will walk you step by step through this process. Along the way they give links to tutorials to help you in this process.

http://www.oclc.org/support/services/discovery/documentation/interface-settings.en.html