Configure content and staff features

Follow these instructions to customize content and staff features in WorldCat Discovery. These instructions provide the initial setting selections. Determine whether or not your library needs to modify the initial selections. WorldCat Discovery configuration options are accessible in the administrative interface, OCLC Service Configuration. If you need help to create an account, see the tutorial Create an Account for OCLC Service Configuration.

Learn more in a training course: WorldCat Discovery configuration: Content and staff features

Confirm or add institution information

Note: No settings are initially configured for these details.

- IP address(es)
  Review the address(es) to ensure that they are correct and that your institution's OCLC symbol and other information is correct. Ensure that "WorldCat Discovery" is selected as a product.
- Institution name and address
- Location on the map

Configure licensed content and databases

Select the databases that will be available to search in your library's WorldCat Discovery interface. Sign in to OCLC Service Configuration and add your databases via the Metasearch Content module. Please see Licensed Content and Databases for more information.

Select databases that will be available to search

Consider making a list of your subscription content before you complete these settings. See a list of what is in the central index. At a minimum, select "unlimited access databases" to ensure users see search results. The databases you choose in this module will be available in your institution's WorldCat Discovery list of databases linked from the Advanced Search screen. Users can add or remove databases from searches.

Note: The initial selection for databases available to search is WorldCat.org.

- Add WorldCat.org and other OCLC databases
- Add non-OCLC databases

Select default databases for your search box

Any databases that are not selected to be searched by default are available from Advanced Search via the Add or
remove databases feature. Searchers can modify the databases used in a search. They can de-select the default databases, add databases and modify the search to their specifications.

Note: The initial selection for search box defaults is WorldCat.org.

- Change your default database, or
- Create a group of databases to search by default

Watch a video

Configure default databases and licensed content (5:09)

This video demonstrates how to configure default databases and licensed content for use in WorldCat Discovery.

Configure shelving locations

If your library uses WorldShare Management Services, the Availability feature, and/or has LHRs in WorldCat, you can configure WorldCat Discovery to display a user-friendly display name instead of a Holding Code in your search results.

- Holding Codes & Shelving Location Messages

Configure the display of full-text links

After you check the option in OCLC Service Configuration to enable full-text links, links will appear in your WorldCat Discovery interface to full-text content. For more information on how links display, please see Full-text link display in WorldCat Discovery. To choose when to display or hide these links based on their source, see Full Text and Open Access Links.

In WorldShare Collection Manager

If you are using WorldShare Collection Manager, you can add knowledge base collections and titles to surface links to your e-resource materials. See Choose a method to add or create a knowledge base collection to represent your e-resource titles in the WorldShare Collection Manager interface.

Make sure to enter your coverage information. See KBART values and formatting for information on how to represent coverage information.

Configure institution settings

If you haven't already, configure institution settings and set holdings in WorldCat via the WorldShare Collection Manager interface. See Configure institution settings for knowledge base collections.
You can change the default order of links from WorldShare Collection Manager as they display in the WorldCat Discovery interface. Please see Display Order for more information.

WorldShare Interlibrary Loan and Tipasa libraries: Make sure you have an appropriate deflection policy in place. See How to deflect lending requests (knowledge base collections) or, if you have a subscription to License Manager, see How to deflect lending requests (License Manager). Most libraries experience an immediate increase in lending requests after setting holdings in WorldCat.

Additional information: Display full-text links and elevate links from a specific provider

Choose the default Scoping Level

Note: The initial selection for Scoping Level is Libraries WorldWide.

Cataloging libraries will see their holdings first, followed by the holdings of other libraries. You can leave this setting unchanged, or change the setting to show only results from your library by selecting Your Library as the sort order. Holdings from other libraries will not be included in the search results. Libraries without a cataloging subscription will see search results based on relevancy with the most relevant items first.

- Select your default Scoping Level

Choose the default sort on search results

Cataloging libraries will see their holdings first, followed by libraries worldwide. You can leave this setting unchanged, or change the setting to pure relevance by selecting Best Match as the sort order. Libraries without a cataloging subscription will see search results based on relevancy with the most relevant items first. Users can change the sort order after a search if desired.

- Select your default sort on search results

Confirm your library's display name

Libraries with cataloging subscriptions need to confirm the display name.

- Confirm your library's display name