Use the WorldCat Services Admin module

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Learn how to use the WorldCat Admin module to improve the effectiveness of FirstSearch. Planning your use of FirstSearch and using the administrative module to make changes improves the effectiveness of FirstSearch for your library and users. For information about planning any changes to settings in the administrative module, see the WorldCat Admin and Plan your use of FirstSearch.

Note: You are not required to change any settings in the administrative module except your administrative module password and FirstService service patron password (see How to change your passwords). Your users can use FirstSearch even if you do not change any settings because OCLC provides default settings for all features.

See Recommended browsers for information about web-browser access to the administrative module. Web-browser access requirements for the FirstSearch user interface are more flexible than the requirements for the administrative module.

Soon after you receive the FirstSearch welcome letter containing your FirstSearch authorization number and temporary passwords, you should log on to the WorldCat Services Administrative Module (see How to log on), check your account information (see How to check your account information), and change your passwords (see How to change your passwords).

How to log on

1. Go to the logon screen for the administrative module.
2. Click the language in which you want to view on-screen instructions (English is the default).
3. Enter your FirstSearch authorization number in the Authorization field.
4. Enter your FirstSearch password in the Password field.
5. Click Start.

How to check your account information

1. If the Home screen is not displayed, click Home on the main menu.
2. If you purchased searches in advance in blocks of 500, you should see per-search account information on the screen.
   a. Searches Remaining - The quantity of searches purchased minus any searches that have been used.
   b. Expiration Date - The date by which the searches remaining must be used. The date should be two years after your last purchase of searches.
   c. Low Search Notification - Can be set so that FirstSearch sends an e-mail notice when the number of searches remaining falls below a certain level.
3. Note any questions you have about the Per Search account information.
4. If you purchased a subscription to one or more databases, you should see subscription account information on the screen.
   ◦ **Expiration Date** - The date on which your subscription ends. The date changes when you renew the subscription.

5. Note any questions you have about the Subscription account information.

6. Note any other questions you have about the Home screen.

## How to change your passwords

Your FirstSearch welcome letter contains an initial administrative module password and FirstSearch service patron password. You must change these passwords. For information about changing your administrative module password, click here. For information about changing your FirstSearch service patron password, click here.

## How to check your database access settings

1. Click **Authentication/Access** on the main menu.

2. If the Database Access screen is not displayed, click **Database Access** in the sidebar menu to view it.

3. Every database included in your account should be listed alphabetically in the Database column of this screen. Databases containing full text are listed twice--once to let you control whether users can select the database for searching (Citation database type) and once to let you control whether they can view full text from the database (Full Text database type).

4. Note any missing databases or any extra databases that should not be included in your account.

5. Look at the Billing Method column to see if it contains the requested billing method for each database: Subscription, Per-Search, or Monthly.

6. Note any questions you have about the Billing Method column.

7. Look at the Access column to see if it contains the following:
   ◦ A check for each database with the Citation database type that you are making available.
   ◦ A check for each full-text database (Full Text database type) with the Subscription billing method that you are making available.
   ◦ No check for each Full Text database with the Monthly billing method that you are making available.
   ◦ No check for each Full Text database with the Per-Search billing method that you are making available.

8. Note any questions you have about the Access column.

9. The Direct Article Access column of the Database Access screen indicates the databases from which information is available for creating direct article access links.

10. Note any questions you have about the Direct Article Access column.

11. Look at the Default Database column to see if the database that you wish to designate (if any) as the default is selected.

12. Note any questions you have about the Default Database column.

13. Note any other questions you have about the Database Access screen.
How to print a screen

A printed record of your administrative module settings helps you answer questions and plan changes. You may want to print each module screen when you start using the module. Whenever you change the settings on a screen, you can print it again to keep your records up to date.

To print an administrative module screen, click Print Your Settings at the top of any screen, then click Help to get instructions on how to print the screen you want.

How to administer multiple accounts

The authorization number for your FirstSearch account appears in the administrative module in the gray bar located below the main menu. Changes that you make in the administrative module affect the use of that account in FirstSearch. If you have multiple FirstSearch accounts, the authorization number below the main menu reminds you which account you are using. To view or change settings for another account, you must log on to the administrative module using the authorization number and administrative password for that account.

How to get online help and news

Although it is easy to use the administrative module, online help and news are available if needed. Online help is context sensitive; each module screen has a Help button in the upper right corner and at the bottom that you can click to view related help topics. Online help appears in a separate, smaller window that overlays the module window so you can view both windows simultaneously. You can click Help in any help window to search online help to find the information you need. You can click News to go to the FirstSearch News page.

How to avoid problems

The following guidelines help ensure that your administrative module settings are saved and applied correctly:

• To move around in the administrative module, use only the options and links on its main menu and screens.
• Do not use any browser buttons or commands except Print. If you use other browser buttons or commands, your session may end. If it does, any unsaved changes will be lost.
• After you click an option or link, wait for the system to complete its response before you click another link.
• Save any changes you make on a screen by clicking Save Changes at the top or bottom of the screen.

How to ask questions

If you note any questions about account information or database access, contact OCLC Support.