Find a checklist of tasks necessary to perform in order to implement WorldCat Discovery.

☐ Attend **WorldCat Discovery configuration: Patron-facing features**.
  
  • Training will provide a baseline of understanding of how to configure the service.

☐ Attend **WorldCat Discovery configuration: Content and staff features**.
  
  • Training will provide a baseline of understanding of how to configure the service.

☐ Consult **content list** to see which databases are available.

☐ Obtain library’s Z39.50 admin credentials from database vendors for remote databases.
  
  • Be sure to request administrative credentials to search via Z39.50 and that the account is set up for Z39.50 searching.

☐ Gather library’s IP addresses.
  
  • Include the IP address for the proxy server.

☐ Obtain secure logo image URL (Optional).
  
  • URL must begin with https.
  
  • Logo image should not be greater than 80 pixels in height and 275 pixels in width.

☐ Gather library’s policies for holds/interlibrary loan requests.

☐ Determine desired default scope and sort order.

☐ Determine placement of search box and create it. Plan to integrate it with third-party tools such as LibGuides and course management systems, and update links in these tools and your webpages as needed.

☐ **Configure content and staff features**.
  
  • This configuration will determine the appearance of the WorldCat Discovery site and the databases that will be searched.

☐ **Configure patron-facing features**.
  
  • This configuration will provide full-text links, place hold, and interlibrary loan buttons.

☐ Configure **WorldCat knowledge base** (Optional).
  
  • This configuration will permit access to full text from WorldCat Discovery and the integration of an A-Z list and link
resolver.

☐ Attend WorldCat Discovery Cohort Session.

  • The cohort session will provide an overview of the service and information on how to search WorldCat Discovery.

☐ Join the discussion in the WorldCat Discovery Community Center.

  • Subscribe to the WorldCat Discovery discussion and news pages in the OCLC Community Center to receive critical systems alerts, to be notified of new releases, and to exchange best practices with your peers.

☐ Review WorldCat Discovery release notes.

  • Release notes contain administrative actions that libraries may need to activate new functionality.