Staff features and accounts

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See the features of the staff view of the WorldCat Discovery interface. Library staff has the option to Sign In to the WorldCat Discovery interface in order to benefit from the staff features that are not visible to patrons. The staff view of WorldCat Discovery includes the:

• **OCLC number in the brief record shown in search results**
  ◦ View the OCLC Number directly within the search results

![Example of OCLC number in search results](image)

• **Option to display the MARC record**
  ◦ Available for libraries that maintain up-to-date holdings in WorldCat and have an OCLC cataloging or CatExpress subscription

![Example of MARC record](image)

• **Ability to create and place ILL requests for patrons directly in the Discovery interface using the Staff ILL Request button.**
  ◦ Click the **Staff ILL Request** button from the item record detail to view the item record from within the WorldShare ILL or Tipasa interface. View holdings for the item and click **Create Request** to populate the request form with the bibliographic information of the item.
    • For additional information about processing requests in WorldShare ILL, please see **Process requests**.
    • For additional information about processing requests in Tipasa, please see **Process requests**.
  ◦ Available to libraries with access to WorldShare Interlibrary Loan or Tipasa. Staff members will need the WorldShare ILL Admin or WorldShare ILL User roles. See **Interlibrary Loan roles** for more information.
Watch a video

Staff features in WorldCat Discovery (4:40)

This video reviews the staff features that are part of WorldCat Discovery.

Create users

Create accounts for your users. Required fields may vary, depending on the services your library subscribes to. Additionally, if you are using a third-party authentication system, you will not see the Identity Management section.

Follow the account naming conventions used by your institution when creating user names. If you are creating accounts for your staff members, make sure you tell them their user name soon after you create the account. They will need their user name to create a password.

Note: Need help? Contact OCLC Order services. If your library does NOT have a WorldCat Discovery URL, please see the information on the Ordering page.

For more information on creating accounts, see Create users in the WorldShare Admin Online Help.

To manage accounts in WorldShare, see User Management.

Create a user account

From the Admin section:

1. On the left navigation, under User Management, click New User.
2. On the Basic User Data panel, OCLC recommends filling in the following fields:
   - **First Name**: Highly recommended
   - **Address, Phone Number, or Email Address**: Email is highly recommended.
Note: In order to create an account, the user/patron requires a **Primary** email address. Enter an email address and select **Primary** next to the **Email Type**.

- **User Name (or Barcode):** Required. If you cannot edit or do not see the User Name field, type in the Barcode field.

Some libraries have additional required fields (those with Circulation functionality and others):

- **Home Branch:** Required for some. Select the user's preferred branch from the list
- **Patron Type:** Required for some. Select the patron type from the list

3. Click **Create**.
4. On the confirmation window, click **OK**. The user/patron account appears.

### Assign roles to a user account

1. In the user account, expand the **Roles** accordion.
2. Within the Roles accordion, click **Edit** (on the far right).
3. Select the appropriate roles.
   - Select **WC Discovery Admin** for staff that will need to be able to administer staff accounts. Otherwise, select **WorldCat Discovery Staff**.
     - See [WorldCat Discovery Roles](https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery/Get_started/Staff_features_and_accounts) for more information.
   - For more information on the actions users can perform with additional individual roles, see [Roles](https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery/Get_started/Staff_features_and_accounts).
   - All accounts must have the Everyone role assigned. The Everyone role is included automatically and should not be removed.
4. Click **Save**.

### Prompt your staff member to set a password

1. For the account you just created, perform one of the following actions so your staff member can create a password:
   a. Click **Set/reset** in the Identity Management section if available, or
   b. Direct your staff to:
      1. Go to your library's WorldShare URL. Replace `yourlibrary` with your library's identifier: https://yourlibrary.share.worldcat.org/wms
      2. Click **Set/reset password** on the Sign In screen.
2. Either action will send a system-generated message to the email address in the account. Please note:
   - Your staff member must follow the link in the system-generated email within 24 hours to set a password. They should check their junk folder if they do not see the email within a few minutes
   - If the link expires, you can perform either of the above steps to prompt your staff member again

Note: Send your staff member their user name. Your staff member needs this information to create a password.