When you subscribe to a WorldShare service, you can manage your user accounts and alert messages using the Admin module. You must have one of the Administrative roles assigned to your account in order to access the Admin module. See how to Add services and manage staff accounts.

• Get started

  No image available

Get started with the WorldShare Admin tab.

  ◦ Roles to access WorldShare Admin
  ◦ Set or reset your password
  ◦ Sign in to Admin

• Account Info

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The Account Info section contains information related to your WMS or third-party authentication method. Account Info is updated every time you ingest user data.

  ◦ Account Info

• Additional Info

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The Additional Info section contains information about the user that was entered in the additionalInfo attribute of the XML file that was created as part of the data ingest process.

  ◦ Additional Info

• Alerts Management

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Alerts are messages that can be sent to users within the WorldShare interface. If you use WorldShare Circulation or WorldShare License Manager, you can configure predefined alerts to be sent to users when a specific action occurs within the system.

  ◦ Configure Alerts

• Basic User Data

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In the Basic User Data section, you can enter personal, contact, and circulation information about your users.
Basic User Data

- **Custom Data**
  
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  The Custom Data section contains four fields that can be used to store additional institution-specific information about the user. If you use WorldShare Circulation, the Custom Data fields will also appear in the patron's account in the Custom Data section of the Profile tab.

- **Diagnostics**
  
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  The Diagnostics section contains old barcodes and information about the staff member who created the user account and the staff member who last modified the user account.

- **Notes**
  
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  You can use the Notes section to add public or staff notes about a user. Note: This section will appear empty if no notes have been added.

- **Roles**
  
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  Find descriptions of available roles. Roles determine what actions users can perform in the system. The roles that you see in your Admin module may vary according to your own roles or the products your library subscribes to.

  - OCLC Service Configuration roles
  - Acquisitions roles
  - Alert roles
  - Record Manager roles
  - Circulation roles
  - Collection Evaluation roles
  - Collection Manager roles
  - Course Reserves roles
  - WorldCat Discovery roles
  - Everyone role
  - Interlibrary Loan roles
  - License Manager roles
Platform Management roles
- Reports and Report Designer roles
- User Management roles
- Web Service Keys Admin role

• Proxies

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Proxies allow you to create a relationships between two user accounts. In the Proxies section of an account, you can add another user to be the primary user's proxy.

• User Management

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Use the Admin module to manage user accounts. Users may consist of staff, patrons, or both. If you use WorldShare Circulation, you will see both patron and staff accounts in the Admin module. Any patron accounts that you create in the Circulation module can also be accessed in the Admin module.

- Examples of roles by library position
- How to assign roles to users
- Search for users
- Create, edit or delete user accounts

• Troubleshooting

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Find frequently asked questions (FAQ), instructions on how to complete specific tasks (How-to), and troubleshooting steps (Troubleshooting).

- Accessing the OCLC Service Configuration when you cannot assign the necessary roles
- A staff member has left. How do I delete their account and will their work be lost?
- Special characters/Diacritics are displaying as question marks in my patron records
- Does WorldShare authorization require using only lower case letters in a user account email address?
- Every time I sign into WorldShare, the "Select branch for current location" box appears.
- How can I add a custom message to our login screen?
- How can I change my account details?
- How can I view or export a list of users and their permissions?
- How can I notify users to renew their accounts before their Expiration Dates?
- How do I change my OCLC Community Center email address?
- How do I determine what authentication method my library is using?
- How do I search for users with an apostrophe in their name?
How do we add the BIBCO role to our accounts?

◦ I’m an Admin for WorldShare, but I don’t see the Admin tab when I log in
◦ Is there a way to search by User ID at Source
◦ Is there a way to see a time and date of a patron profile changes?
◦ I am getting an "email address invalid" error message when trying to log into WorldShare
◦ I am getting an error message mentioning my email address when logging into WorldShare
◦ I am getting a "User ID is invalid" error message when trying to change my WorldShare password
◦ I am trying to create a WorldShare account, but the username field is grayed out.
◦ I am trying to remove the Cataloging Full role from a user, but the check box is appearing as greyed out.
◦ I am using third party authentication and I accidentally assigned the incorrect User ID at Source to an account. How do I remove this?
◦ I can't log in to WMS. The error message is "One or more signatures could not be validated on the SAML response from the identity provider"
◦ I can't access WorldShare. I don't see the set/reset password option in WorldShare?
◦ I forgot my WorldShare URL.
◦ I forgot my WorldShare username
◦ I have taken over OCLC accounts, how do I get Admin access for WorldShare?
◦ My library is using dual authentication. How do I change the text of our sign-in buttons?
◦ User is getting a login error, but there is no password reset link to change it
◦ Nothing Here. We're sorry. What you are looking for is not here error when logging into WorldShare
◦ Are patrons able to enter Notes in their WMS staff accounts?
◦ Why are patron photos not showing up anymore in Circulation patron accounts?
◦ The Course Reserves Manager role is not available as an option. How do I assign this to a user?
◦ The Identity Management section is missing in WorldShare Admin. Where did it go?
◦ Unable to process request error
◦ We are a WMS library. Why can't I add a phone number for SMS delivery notifications to an account?
◦ We have multiple branches, am I able to sign-in to different branches without logging out or closing my browser?
◦ What is the Cataloging Evaluation role in WorldShare Admin?
◦ What role does my WorldShare account need in order to assign course reserve roles to other accounts?
◦ What search can bring up all users under User Management?
◦ When I try to login into WorldShare, I get an error that the page is not working
◦ When logging in to WorldShare I get an error message that says "We're sorry. We are unable to process your request at this moment. Please try again later."
◦ When signing in to WorldShare, I get an error message: "You are not authorized to view WorldShare ILL."
◦ Where can I find availability statistics for my WMS?
◦ Where can I find our production principal_idns?
◦ Which characters are not permitted in a WorldShare username?
- Why am I getting an "Username or password is invalid. Authentication failed." error when logging in?
- Why am I getting a "There is a problem with the email address in your user account" error when logging into WorldShare?
- Why am I not receiving a password reset email?
- Why am I receiving an error when trying to reset my WorldShare password?
- Why am I receiving a "there is a problem with your email address" error when logging into the Community Center?
- Why can't I create new user accounts in WorldShare?
- Why can't I get past the "Select branch for current location" box?
- Why can't I log in to the Developer network to get my WSKey?
- Why does clicking the Password Reset Link sent in an email lead to a blank page?
- Why does the error "User record not found" appear when attempting to sign in to WMS?
- Why is my WorldShare account expired?
- Why is the ID Verified box not automatically checked when I create a new account?
- Why am I constantly getting a Server Communication Failed error message when logging into our site