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
  
  Get started with the WorldShare Admin tab.
  ◦ Roles to access WorldShare Admin
  ◦ Contact OCLC Order Services
  ◦ Set or reset your password
  ◦ Sign in to Admin

• Account Info
  
  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
  
  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
  
  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.

  ◦ Custom Data

• 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.

  ◦ Diagnostics

• 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.

  ◦ Notes

• 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.

  ◦ 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
• 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).

• Are WorldShare accounts specific to one machine or can you use them on more than one?
• How can I get past the “Your account has expired.” error message I get when logging in?
• How do I change my account details?
• I’m not receiving the System Alert emails that I subscribed to. What’s wrong with my subscription?
• I can’t log in to WMS. The error message is “One of more signatures could not be validated on the SAML response from the identity provider”
• What to do if you discover you have two patron records for the same patron including the same barcode?
• 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?