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.

• Get started

No image available

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

No image available

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

No image available

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

No image available

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.

◦ Alerts
• Basic User Data

No image available

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

◦ Basic User Data

• Custom Data

No image available

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

No image available

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

No image available

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

No image available

Roles determine what actions users can perform in the system. The roles that are available for use are described in this help. The roles that you see in your Admin module may vary according to your own roles or the products your library subscribes to.

◦ Assign roles to users
◦ Examples of roles by library position
◦ 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

• Proxies

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.

  - Proxies

• User Management

You can use the Admin module to manage information about your 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.

  - User Management