Configure content and staff features

Follow these instructions to customize content and staff features in WorldCat Discovery. These instructions provide the initial setting selections. Determine whether or not your library needs to modify the initial selections. WorldCat Discovery configuration options are accessible in the administrative interface, OCLC Service Configuration. If you need help to create an account, see the tutorial Create an Account for OCLC Service Configuration.

Learn more in a training course: WorldCat Discovery configuration: Content and staff features

Confirm or add institution information

Note: No settings are initially configured for these details.

- **IP address(es)**
  Review the address(es) to ensure that they are correct and that your institution's OCLC symbol and other information is correct. Ensure that "WorldCat Discovery" is selected as a product.

- **Institution name and address**
- **Location on the map**

Configure licensed content and databases

Select the databases that will be available to search in your library's WorldCat Discovery interface. Sign in to OCLC Service Configuration and add your databases via the Metasearch Content module. Please see Licensed Content and Databases for more information.

See Configure databases to search for information about selecting databases that will be available to search and selecting default databases for your search box.

Configure shelving locations

If your library uses WorldShare Management Services, the Availability feature, and/or has LHRs in WorldCat, you can configure WorldCat Discovery to display a user-friendly display name instead of a Holding Code in your search results.

- **Holding Codes & Shelving Location Messages**

Configure the display of full-text links

After you check the option in OCLC Service Configuration to enable full-text links, links will appear in your WorldCat Discovery interface to full-text content. For more information on how links display, please see Full-text link display in
WorldCat Discovery. To choose when to display or hide these links based on their source, see Full Text and Open Access Links.

**In WorldShare Collection Manager**

If you are using WorldShare Collection Manager, you can add knowledge base collections and titles to surface links to your e-resource materials. See Choose a method to add or create a knowledge base collection to represent your e-resource titles in the WorldShare Collection Manager interface.

Make sure to enter your coverage information. See KBART values and formatting for information on how to represent coverage information.

**Configure institution settings**

If you haven’t already, configure institution settings and set holdings in WorldCat via the WorldShare Collection Manager interface. See Configure institution settings for knowledge base collections.

You can change the default order of links from WorldShare Collection Manager as they display in the WorldCat Discovery interface. Please see Display Order for more information.

WorldShare Interlibrary Loan and Tipasa libraries: Make sure you have an appropriate deflection policy in place. See How to deflect lending requests (knowledge base collections) or, if you have a subscription to License Manager, see How to deflect lending requests (License Manager). Most libraries experience an immediate increase in lending requests after setting holdings in WorldCat.

**Additional information:** Display full-text links and elevate links from a specific provider

**Choose the default Scoping Level**

Note: The initial selection for Scoping Level is Libraries WorldWide.

Cataloging libraries will see their holdings first, followed by the holdings of other libraries. You can leave this setting unchanged, or change the setting to show only results from your library by selecting Your Library as the sort order. Holdings from other libraries will not be included in the search results. Libraries without a cataloging subscription will see search results based on relevancy with the most relevant items first.

- Select your default Scoping Level

**Choose the default sort on search results**

Cataloging libraries will see their holdings first, followed by libraries worldwide. You can leave this setting unchanged, or change the setting to pure relevance by selecting Best Match as the sort order. Libraries without a cataloging subscription will see search results based on relevancy with the most relevant items first. Users can change the sort order after a search if desired.
• Select your default sort on search results

Confirm your library's display name

Libraries with cataloging subscriptions need to confirm the display name.

• Confirm your library's display name

To customize your library's WorldCat Discovery URL, contact OCLC Order services to request a change to your library-specific URL. If you have concerns about the impact to WorldCat Local or to WorldShare Management Services, contact OCLC Support.

If your library uses other WorldShare services, including WorldShare ILL or WorldShare Management Services (WMS), we do not recommend making changes, as this also changes the URL used for those services.