

# OCLC Service Configuration Guide



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# Introduction

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OCLC® Service Configuration uses WorldCat account information to configure institution-related information. For OCLC members, it also allows configuration of OCLC products and services.

**Note:** Any user will be able to use WorldCat Registry settings to configure institution information, but you may only see other OCLC products and services to which you subscribe.

## Products

### WorldCat Local

Configure your WorldCat Local settings:

- Update your banner, custom links and display settings.
- Set the default sort order of your search results.
- Edit your local relevancy group.
- Specify the OpenURL resolvers that will display.
- Customize your Place Hold and Request buttons (WorldCat Local only).
- Define circulation and lending policies (WorldCat Local only).
- Customize your OCLC Holding Code Location information (WorldCat Local only).
- Display content or links to your end users.
- Supply a feedback e-mail address, and describe the level of system support you provide.

### Metasearch Content

Select and organize databases that your users can search.

### Global Policies

Set your general resource sharing policies and charges.

### Mobile Client

Set up contact information for your WorldCat Mobile users.

### EasyBib

Export data to EasyBib.

### WorldShare Management Services Circulation

Configure your Circulation settings for WMS:

- Set patron types for your users.
- Add location policies for branch locations of your library.
- Set loan limits for your patrons.
- Set loan policies for your users.
- Set up non-standard billing reasons.
- Select any billing payment methods that your library accepts.
- Set up billing structures for your users.
- Set hold limits for items.
- Set hold policies for items.

### WorldCat Registry

Configure and maintain a profile that defines your institutional identity, to enable all web users access to your institution's services and set relevant data for other OCLC products.

Configure your WorldCat Registry settings:

- Create a new institution
- Update or add directory-style information such as name, home page and identifiers.
- List services such as your online catalog, IP addresses, OpenURL resolvers, and virtual reference service.
- Add a mapped location and hours of operation.

- Set branch and affiliation information.
- Supply your institution's staff contacts.
- View an institution's profile summary and profile history.
- Share or download an institution's profile.

## WorldCat knowledge base

Configure your WorldCat knowledge base settings and manage your collections.

## System Requirements

Recommended browsers:

- Google Chrome (latest version)
- Microsoft® Internet Explorer versions 7+
- Mozilla Firefox versions 3.6 and latest version

## Signing In

To review current settings and make modifications to address your library's preferences, sign in to OCLC Service Configuration at <http://worldcat.org/config/>.

### If you have a WorldCat account

You can use your WorldCat account ("My WorldCat" account on WorldCat.org, "My Account" on WebJunction®, WorldCat Registry™ account, or an OCLC Online Service Center account) to access OCLC Service Configuration.

Step	Action	Result
1	Sign in using your user name and password. <b>Note:</b> Passwords are case-sensitive.	The Welcome screen appears.
2	If you need to be authorized for an institution, click the link and follow the instructions to <a href="#">add an institution to configure</a> .	
3	Select an institution from the drop-down list.	
4	Click <b>Go</b> .	The Welcome screen confirms that you have successfully selected your institution.

### If you are authorized for multiple institutions

Step	Action	Result
1	Click the <b>Click here to browse</b> link under the Institution drop-down list.	A list of all of your institutions appears.
2	Type part of a name, an alias or a WorldCat Registry ID to filter the list.	The list is reduced to fewer results.
3	Click the institution name.	
4	Click <b>Go</b> .	The Welcome screen confirms that you have successfully selected your institution.

### If you do not have an account

You can create a WorldCat account that also allows access to other products such as WorldCat.org, WebJunction®, WorldCat Registry™, and the OCLC Online Service Center.

**To create an account:**

Step	Action	Result
1	Click the <b>Create an account</b> button on the Sign In screen.	The Create an account screen appears.
2	Choose a WorldCat User Name, password, and type your first and last names, and e-mail address.	
3	Click <b>Create an account</b> .	The account settings screen appears. Follow the steps under <a href="#">Your account</a> to add an institution to configure.

## Your account

### Account settings

After you sign in, you may click **Settings** to verify your account settings. Your name, e-mail address and password are shown. To change these fields, type new text in the appropriate field and click **Save Personal Information**. If you need to change your password, click **Change Password**.

### To add an institution to configure:

If you have not yet added institutions that you are authorized to configure, you can do that after signing in.

Step	Action	Result
1	Click <b>Authorize me for an Institution</b> on the Welcome or Settings screens.	The Add (more) institutions to configure screen appears.
2	Type your library's FirstSearch, WorldCat Resource Sharing or Connexion authorization and administrative password. <b>Note:</b> You must use a FirstSearch, WorldCat Resource Sharing or Connexion authorization and administrative password associated with that account. If you manage an account for a service other than those listed, contact OCLC Order Services at <a href="mailto:orders@oclc.org">orders@oclc.org</a> .	
3	Click <b>Add Institution</b> .	If accepted, a confirmation message appears. The new institution will be available for configuration in a few business hours.
4	Click <b>Configure Products</b> or <b>Return to Home Page</b> to return to the OCLC Service Configuration modules.	

## User Interface Options

Use this screen to update your banner, custom links and display settings. Indicate if and where you would like to change the default settings. Guidelines for formatting are provided where necessary.

### Choose your WorldCat.org URL

If the World Cat Local URL and Institution Name are acceptable as is, go on to [Customize the banner \(optional\)](#).

#### To change the WorldCat.org URL:


Step	Action	Result
1	Type the desired URL in the WorldCat URL field. <b>Note:</b> Changing this URL will impact any OCLC service you subscribe to on the Worldcat.org platform. Please consult with any other potentially impacted library staff before changing this.	
2	Click <b>check availability</b> to see if the URL is already being used.	A confirmation message appears to tell you if the name is available.

<b>WorldCat Local Redirect</b>	Check this box to automatically redirect WorldCat.org users to your WorldCat Local when they go to a record on www.worldcat.org. <b>Note:</b> Users must be IP authenticated to your institution.
<b>Institution Name</b>	Your institution name is listed as it will appear in the "Libraries that own this item" line on the search results, in scoping drop-downs, and in the detailed item view where availability is shown. This name is configured in the <a href="#">Relevancy and Scoping</a> module under <a href="#">Display name</a> .


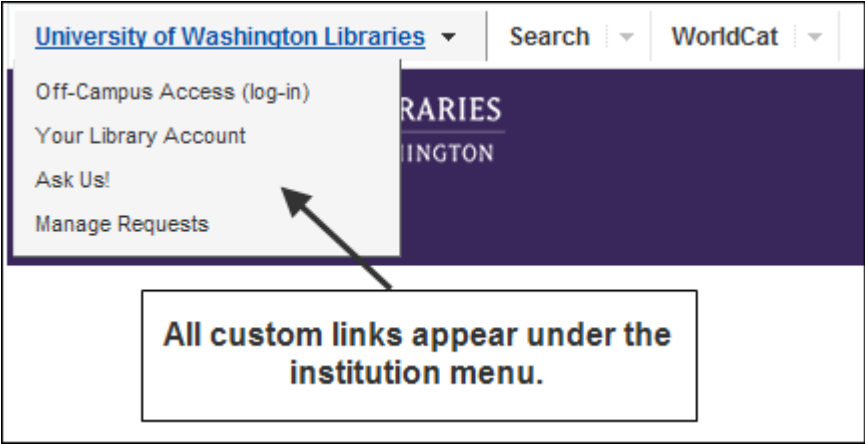

### Customize the banner (optional)

If you would like to change the banner at the top of your WorldCat.org screen, please follow the steps below.

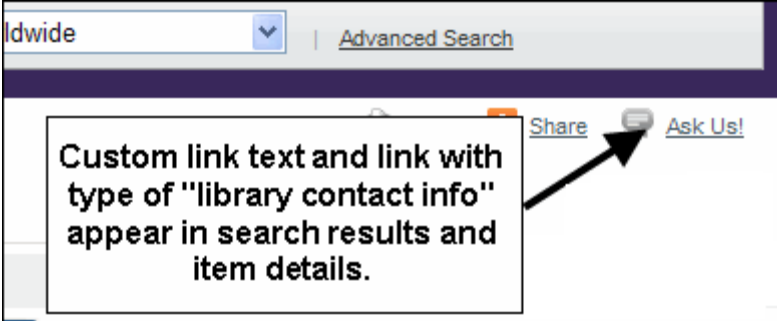
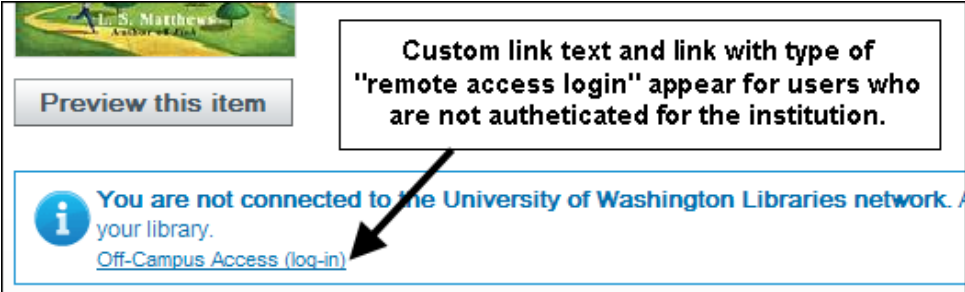
**Note:** See the images below for examples of banner customizations.

<b>Pick a color for the banner</b>	Type the hex value in the field provided (a hex color value is a six-digit code that browsers can interpret and render into a desired color), or use the color picker to find a hex value.  The image shows a dark purple banner with the University of Washington logo (a large 'W') and the text 'UNIVERSITY LIBRARIES' and 'UNIVERSITY of WASHINGTON'. Below the logo is the text 'UW WorldCat'. A white box labeled 'Banner color' is positioned on the right side of the banner.
<b>Logo image URL</b>	If your WorldCat.org currently does not have a logo image, or if you would like to replace the current logo image, please provide a URL to an image of your institution's logo. The URL must begin with "http://" and be no longer than 255 characters. The logo image also cannot exceed 80 pixels in height and 275 pixels in width. Click <b>test URL</b> to confirm your choice.

## My WorldCat.org

	<p><b>Note:</b> Images larger than this will automatically be resized.</p>  <p style="text-align: center;"><b>Logo</b> Clicking the logo takes the user to a URL that you designate.</p>
<b>Alt-text for the logo</b>	Type text that will appear when the cursor hovers over the logo.
<b>Home page URL</b>	Type the URL for the page where the user is sent when they click the logo image.
<b>Text to appear with logo</b>	You can also display text with your logo (40 character limit).
<b>Configure the default search behavior of the simple search box</b>	<p>Choose whether or not to add full text to your default search behavior in WorldCat Local. Adding this feature will result in additional search options for full text under Advanced Search.</p> <p><b>Note:</b> The full text fields will only display for databases which support full text.</p>
<p><b>Custom Link(s)</b> Choose up to seven custom links to appear in the banner</p>	<p>You can create up to seven custom links that will display on your WorldCat Local screens. Please provide the URLs, link type and accompanying text for up to seven custom Web links (e.g., links leading to your library home page, Ask a Librarian, or the patron account page). These links should be listed in the order you want them to appear. There is a 25 character limit on the text for each link.</p>  <p style="text-align: center;"><b>All custom links appear under the institution menu.</b></p>  <p style="text-align: center;"><b>Custom link text and link with type of "local library account access" appear in the header on all WorldCat Local pages.</b></p>


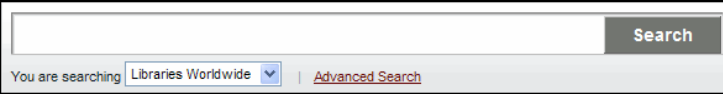
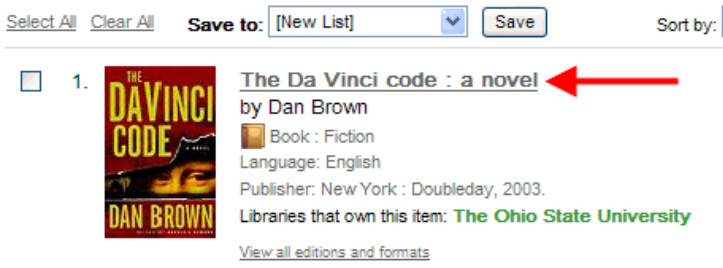


## My WorldCat.org

	 <p><b>Note:</b> If you wish to allow remote access outside your IP address, one of your custom links must be to your remote access page, and you must choose "remote access login" as the link type.</p> 
<p><b>Custom link: Display Chat Widget</b></p>	<p>The chat widget will open in a new window when the <b>Chat</b> link is clicked in WorldCat Local. To display the chat widget for patrons, click <b>Yes</b>. Then fill in the fields provided.</p> <p><b>Note:</b> The recommended size for the widget is 185 pixels wide x 275 pixels high.</p> <p><b>Do you have a QuestionPoint account?</b> If you are a QuestionPoint user, your Qwidget can be generated by supplying your QuestionPoint User ID in the box provided. If you do not have a QuestionPoint account, you can display a different chat widget in WorldCat Local by pasting a code snippet in the box provided.</p> <p><b>Chat code:</b> When copying and pasting a code snippet, please ensure that it is copied directly from the source. When the code is copied from an e-mail or text document, carriage returns can sometimes be entered which will cause the code to fail.</p> <p><b>Always display chat window:</b> Check the box if you wish to always display the chat window. If the box is not checked, the chat widget will be launched when the user selects the "Library Contact Info" link, identified by the display text.</p>
<p><b>Custom link: A to Z list</b></p>	<p>Create this link to allow patrons to discover electronic journals held within the WorldCat knowledge base.</p> <p><b>Link type:</b> Choose <b>other</b>.</p> <p><b>URL:</b> Enter the following URL format:  <a href="http://yourlibrary.worldcat.org/openurlresolver/search">http://yourlibrary.worldcat.org/openurlresolver/search</a></p> <p><b>Display text:</b> Enter display text (25 character limit), e.g. "A-Z List for eJournals"</p>
<p><b>Color of links and text in the banner</b></p>	<p>To customize the color of banner links and text, type a hex value in the field provided (must be 6 characters), or use the color picker to find a hex value.</p>

# My WorldCat.org

## Customize links and buttons (optional)

Choose colors to display throughout WorldCat.org. Type the hex value in the field provided (must be six characters), or use the color picker to find a hex value. See the images below for examples of each custom color.

Custom Color	Hex Value	Example
<b>Search and fulfillment buttons</b>	(example: 999999)	
<b>Search box</b>	<i>The search box is set automatically and cannot be changed.</i>	
<b>Unvisited Links</b>	(example: 333333)	
<b>Hover Links</b>	(example: CC0000)	
<b>Visited Links</b>	(example: 5A458D)	

## General display settings

### Display buying options?

Buy It is an optional feature that provides an additional delivery method for your users. Turning on the **Buy it** link allows your patrons the option to purchase titles that are available via Amazon.com, Barnes & Noble, Better World Books, Baker & Taylor, and British Library. The **Buy it** link is determined by ISBN.

### Activate Course Reserves

Activating the Course Reserves link allows your patrons to search for courses and reserved materials in your collection. Course Reserves appears under the **Search** drop-down menu in WorldCat Local.

There are two levels of permissions in Course Reserves:

- Manager—create/edit/delete courses and titles in courses
- Maintainer—add/remove titles to existing courses

To create and maintain courses, you will need to sign into your WorldCat.org account in WorldCat Local. Libraries with access to OCLC Service Configuration will have access to the Manager role in Course Reserves. If you experience any issues logging in, or with your ability to create and/or manage course reserves after logging in, please contact [orders@oclc.org](mailto:orders@oclc.org) for assistance. Please include your institution's OCLC symbol when submitting your request. Similarly, if you would like to request access for other users at your institution, you may also do so by contacting [orders@oclc.org](mailto:orders@oclc.org).

## Customize availability column labels (optional)

Column labels for availability information in WorldCat Local are customizable. The default column labels shown will display if these fields are not changed.

Location	Status	Call number	Notes
LIM Childrens Juvenile	DUE 09-13-10	PZ7.R79835 H359 2007 c.4	
MANS Stacks	<span style="color: green;">✔ IN TRANSIT +1 HOLD</span>	PZ7.R79835 H359 2007	
Thompson Library Stacks 10th Floor	DUE 10-11-10	PZ7.R79835 H359 2007 c.3	

### Library availability

To change the column labels for physical availability, type the desired label name in each field.

### Customize authentication prompt for restricted content

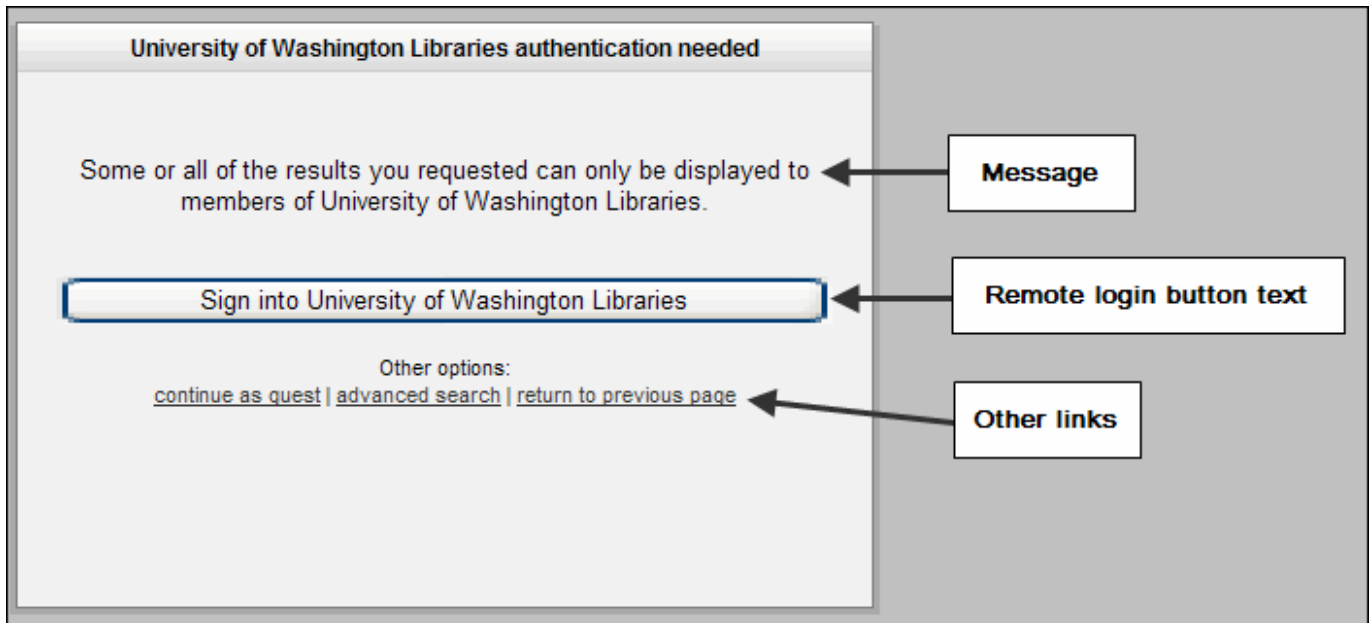
A prompt will appear when the user attempts to view records in WorldCat Local that require authentication. You can customize the text that appears in the prompt.

Use the default text, or customize your text by clicking **Use custom text**.

**Note:** When default text is selected, the fields under **Use custom text** are not editable.

<b>Message</b>	Type a custom message about your authentication process. There is a 300-character limit in this field. <b>Note:</b> Please do not use line breaks, carriage returns or special characters.
<b>Remote login button text</b>	This button will always take the user to the remote access link defined in the custom web links. There is a 70-character limit.
<b>Link text to unauthenticated searching</b>	This link will only display when the user is attempting to view search results that have a mixture of restricted and unrestricted searching. There is a 120-character limit.
<b>Other links</b>	Show other links, such as a link to the Advanced Search screen or previous screen.

Example of the default prompt text:



## Customize WMS Sign In Labels

Use these fields to customize the labels for your WMS Sign In screen.

<b>Custom WMS 'User Name' label</b>	Provide a label for the <b>User Name</b> field on your WMS Sign In screen.
<b>Custom WMS 'Password' label</b>	Provide a label for the <b>Password</b> field on your WMS Sign In screen.
<b>Forgot Password text</b>	Use the default text, or customize your text by typing over the text. There is a 255 character limit.

When you are finished, click **Cancel** to start over, or **Save Changes** to save and continue.

For further information, please see our [tutorials](#).

## **Relevancy and Scoping**

Use this screen to set the default sort order of your search results, and edit your local relevancy group. When the sort order in WorldCat Local is set to "Library and Relevance," the search results will display based on the levels of relevancy configured here. By default, WorldCat Local displays results for your institution or institutions first, followed by Libraries Worldwide.

### **OCLC symbols that represent your institution (1<sup>st</sup> Level of Relevancy)**

Items held by your OCLC institution symbols will be sorted first. A patron searching on your WorldCat.org will be affiliated with institutions at this level. The libraries represented by these symbols must share a catalog in order to return holdings and availability.

<b>OCLC Symbols</b>	Enter OCLC symbols separated by commas. Click <b>Find OCLC institution symbols</b> to find an OCLC participating library or its symbol. <b>Note:</b> If any changes are made to your OCLC symbols, items held by your library will temporarily not be displayed in WorldCat.org until the next business day (approximately 9 a.m. US Eastern time). This also applies to holdings for your original symbol.
<b>Display name</b>	This name will appear on the "Libraries that own this item" line on the search results, in scoping drop-downs, and in the detailed item view where availability is shown. <b>Note:</b> You can also confirm how the display name is shown in the <a href="#">User Interface Options</a> module under <a href="#">Institution Name</a> .

**Note:** Any changes to your institution information will not be reflected in WorldCat.org until the following business day (approximately 9 a.m. US Eastern time). Items held by your library will temporarily not be displayed until the next business day.

### **2<sup>nd</sup>/3<sup>rd</sup> Level of Relevancy (optional)**

In your WorldCat.org, items held at these levels will sort immediately after the level configured in the 1<sup>st</sup> Level of Relevancy (above). This is usually a consortia catalog, or a group that lends items to your patrons. If a different scope hasn't been selected by a user, WorldCat.org will limit results to items held by the configured [default scoping level](#).

<b>OCLC Symbols</b>	Select your participating library group from the drop-down list. If your library group is not listed, enter the OCLC institution symbols of all of the members of your library group. Enter OCLC symbols separated by commas. Click <b>Find OCLC institution symbols</b> to find an OCLC participating library or its symbol.
<b>Display name</b>	This name will appear on the "Held by" line on the search results in WorldCat Local, in scoping drop-downs, and in the detailed item view where availability is shown.

**Note:** Any changes to your institution information will not be reflected in WorldCat.org until the following business day (approximately 9 a.m. US Eastern time). Items held by your library will temporarily not be displayed until the next business day.

## Default Scoping Level

Scoping gives users the ability to limit results to items held by your institution, or items held by your institution and those held by Libraries Worldwide. Choose the default scoping level you prefer from the drop-down list. The user has the option of overriding this setting.

Libraries not using WorldCat Local have the option to turn off scoping entirely.

## Default sort on search results

<b>Default sort</b>	You may define how search results are sorted by default when initially displayed. A user may change this setting to view other sort options, but every time a search result is initially displayed, the default sort setting will always be selected. Choose your default sort level from the drop-down list.
<b>Display the top 5 relevancy results in addition to the "Library and Relevance" results</b> (known item searching)	You may also choose to display the top five relevancy results for a search in WorldCat Local. If enabled, WorldCat Local will display the top five most relevant items from any library, followed by the library and relevance. <b>Note:</b> Configuring the top five relevancy results will have no impact on the default sort order. If you've configured a sort order other than Library and Relevance it will continue to be the default and the top five relevancy results will only display when the user manually sorts to Library and Relevance using the drop-down in WorldCat Local. The user can collapse the top 5 results if they do not want them.

When you are finished, click **Cancel** to start over, or **Save Changes** to save and continue.

For further information, please see our [tutorials](#).

## Full Text OpenURL Resolvers (outgoing requests)

Use this screen to specify the OpenURL Resolvers that will display for outgoing requests.

### Full Text OpenURL Resolver (optional)

OCLC has attempted to determine your Full Text OpenURL Resolver and your ILLiad resolver and incorporate them into your WorldCat.org. However, if either is missing or not working as expected, please supply the URL to the correct resolver. If you have a full text OpenURL Resolver configured to display, a button or link to the resolver will display to users.

<b>Which Full Text Resolver should display?</b>	Choose which level of resolver you wish to display from the drop-down list.
<b>Button or Link Label</b>	If you would like to change the label, type the text you would like to use for your full text button. For best display, keep this label under 30 characters. Click the check box to open the link in a new window when users click the button.
<b>Configure the Full Text OpenURL Resolver for this WorldCat.org</b>	Choose a Full Text OpenURL Resolver from the OpenURL Resolvers you have already registered with OCLC. Click <b>View registered OpenURL Resolvers</b> to go to your OpenURL Resolvers list in the <a href="#">WorldCat Registry™</a> .
<b>For items held/ not held by...</b>	Choose the option you prefer for when you want to display full text to your users at the local, group and worldwide levels. See <a href="#">Item Types</a> for further information.

Item types are described below:

Item Types	
<b>Monograph (default type)</b>	Anything that is not in one of the groups below.
<b>Serial</b>	Leader value of serial, not web-based.
<b>Article</b>	Leader value of article.
<b>E-Serial</b>	Leader value of text serial and cataloged as an internet resource. Also Leader value of Computer File and cataloged as an internet resource and serial.
<b>Mass digitized electronic content</b>	Electronic-only format and is known to be free.
<b>All other electronic content</b>	Any other electronic content such as e-computer files, e-audio, e-visual materials, and e-maps.

**Note:** Circulation data is defined in the [OPAC Statuses, Locations, and Circulation Policies](#) module.

When you are finished, click **Cancel** to start over, or **Save Changes** to save and continue.

For further information, please see our [tutorials](#).

## Full Text OpenURL Resolvers (incoming requests)

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Use this screen to set link resolution for incoming requests.

**Note:** You must have a WorldCat Local subscription and have your holdings set in the WorldCat knowledge base in order for this open URL resolver page to display properly.

### Link Resolution Page for Incoming Requests:

<b>Base URL</b>	Copy and paste this URL into your databases in order to generate your library's OpenURLs to find full text links in WorldCat Local.
<b>Automatically take the user to the best full text link found and skip the resolution page</b>	Click <b>On</b> to automatically take the user to the best full text link found, and skip the resolution page, or click <b>Off</b> to take the user to the resolution page.

When you are finished, click **Cancel** to start over, or **Save Changes** to save and continue.

## Place Hold/Request Buttons (WorldCat Local only)

Use this screen to customize your **Place Hold** and **Request** buttons.

### Place Hold/Request button (Level 1)

If patron-initiated requests are allowed, a fulfillment button will appear to users. You may customize the button by providing the following:

<b>Level 1 Button Label</b>	<p>What terminology do you prefer for patron-initiated requests for items in your collection? For best display, keep this label under 25 characters. Click the check box to open the link in a new window when users click the button.</p> <p><b>Note:</b> This button text will be used in the select menus under the <a href="#">For items owned by...</a> section.</p>
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### Place Hold/Request button (Level 2, and Level 3 if applicable)

If patron-initiated requests are allowed, a fulfillment button will appear to users. You may customize the button by providing the following:

<b>Level 2 (and Level 3 if applicable) Button Label</b>	<p>What terminology do you prefer for patron-initiated requests for items in your group's collection? For best display, keep this label under 25 characters. Click the check box to open the link in a new window when users click the button.</p> <p><b>Note:</b> This button text will be used in the select menus under the <a href="#">For items owned by...</a> section.</p>
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### Resource Sharing (Any Level)

If you have Resource Sharing Management software that will accept incoming OpenURLs, you can configure it as your resource sharing option in WorldCat Local. If you do not have resource sharing configuration via OpenURL, WorldCat Local will display resource sharing options to your patrons when a user is IP authenticated to WorldCat Resource Sharing (WCRS).

The resource sharing options configured at this level (regardless of who holds the item) will always be used. Currently, ILLiad is the only resource sharing option that can be configured as an OpenURL Resolver. If you do not have ILLiad, WorldCat Local will use WorldCat Resource Sharing to let patrons initiate interlibrary loan requests, as configured by WCRS.

**Note:** You may check the [WorldCat Services Administrative Module](#) for WCRS configuration by clicking the **more about resource sharing** link.

<b>Resource Sharing Button Label</b>	<p>What terminology do you prefer for patron-initiated requests for resource sharing? For best display, keep this label under 25 characters. Click the check box to open the link in a new window when users click the button.</p> <p><b>Note:</b> This button text will be used in the select menus under the <a href="#">For items owned by...</a> section.</p>
<b>Type of button configuration</b>	Choose the type of button for your OpenURL Resolver.

## My WorldCat.org

<b>Choose an OpenURL Resolver from the OpenURL Resolvers you have already registered with OCLC</b>	Choose a resource sharing OpenURL Resolver from the OpenURL Resolvers you have already registered with OCLC. Click <b>View registered OpenURL Resolvers</b> to go to your OpenURL Resolvers list in the <a href="#">WorldCat Registry™</a> .
<b>Configure an additional button (optional)</b>	You may configure more than one fulfillment button to handle resource sharing requests (at level 2, 3, or 4), although only one button may show at a time. To configure an additional button, click <b>Configure an additional button</b> .

### For items owned by...

Choose the options you prefer for when you want to display the fulfillment options to your users at the local, group and worldwide levels. Click the arrow next to each section title to expand or collapse the fulfillment options for each level. Local options correspond to the Level 1 Fulfillment column in the OPAC status table on the [OPAC Status, Circulation and Lending Policies](#) module. Group options correspond to the Level 2 and Level 3 (if applicable) Fulfillment column in the table, and worldwide options correspond to the Level 4 Fulfillment column.

[Click here](#) for more information on Item Types.

**Note:** WorldCat Navigator member libraries please contact OCLC to make changes to these OpenURL Resolver Resource Sharing settings.

**OCLC support:**

Telephone +1-614-764-6000, ext. 3510 or 1-800-848-5800 (USA)

Fax +1-614-764-2694

E-mail [support@oclc.org](mailto:support@oclc.org)

When you are finished, click **Cancel** to start over, or **Save Changes** to save and continue.

For further information, please see our [tutorials](#).

## **OPAC Statuses, Locations and Circulation Policies (WorldCat Local only)**

Use this screen to define circulation and lending policies. WorldCat Local uses OCLC numbers to link between WorldCat Local and your catalog. Therefore, OCLC numbers must be present in your local catalog, and must be consistently indexed within your ILS.

If you would like to configure your WorldCat Local to search your library catalog using the [NISO Z39.50 Protocol](#), you may also need to map the OCLC number index to an attribute in your Z39.50 server.

### **Local links to online content**

WorldCat Local will attempt to get local OPAC links (for example, 856 links) to online content from the OPAC:

**Which local OPAC links to online content should display in WorldCat Local:** Links have been set at a default level. Click the check box if you do not wish to display OPAC links to online content that look like a duplicate of one already retrieved from the OPAC.

**Note:** These fields are not editable at this time. If you feel these are incorrect, please contact [OCLC Customer Support](#).

### **Item Availability from the OPAC**

WorldCat Local will attempt to get local item availability information from your local OPAC. The following information is listed for you in OCLC Service Configuration:

<b>Select your ILS Vendor</b>	Your ILS Vendor is listed.
<b>Select your ILS Product/Version</b>	Your ILS Product/Version is listed.
<b>How should WorldCat Local get item information?</b>	Shows your selection whether you want OCLC to "scrape" the information from the OPAC, or use Z39.50.
<b>Enter the URL used to search for items in the catalog by OCLC#</b>	Enter the URL for your catalog. For example: <a href="http://olc1.ohiolink.edu/search/o77496353">http://olc1.ohiolink.edu/search/o77496353</a> Click the check box if you do not wish to display holdings and availability information that look like a duplicate of one already retrieved from the OPAC.
<b>Display Item Availability on search results</b>	Choose whether or not you want to display availability on the Search Results screen in WorldCat Local.
<b>Would you like to treat some item types as a different kind of item?</b>	Choose whether or not you want to use default WorldCat Local <a href="#">item types</a> . If you want to treat some item types as a different item, provide that information in the table. <b>Note:</b> MARC fields are determined by the WorldCat Master record.

**Note:** Some of these fields are not editable at this time. If you feel these are incorrect, please contact [OCLC Customer Support](#).

## OPAC Status grid

Please list all status messages and fulfillment options that appear in your OPAC. You can change the data in the table by typing directly in the table cells.

**Note:** If the item's library location impacts the policies you set for the item, please include all possible combinations of statuses and locations. If the location of an item does not impact the policies you set for the item, please leave the Location cell blank.

For further instructions, please see our [webinar](#).

Status	Definition
<b>OPAC Status Message</b>	Item status message that WorldCat Local retrieves from your OPAC (e.g., In Process, On Shelf, etc.).
<b>Location</b>	Item shelving location that WorldCat Local retrieves from your OPAC (e.g., Main Stacks, Reserves, etc.).
<b>OCLC Standard Status Message</b>	Maps your status string from the OPAC to a standard status (optional).
<b>Status Treatment</b>	Choose whether OPAC Status is available or unavailable. This also controls the availability messaging for items with this OPAC status.
<b>Local Online Links</b>	Choose whether to display any Online links that are found in your OPAC (e.g. 856 links) for items with this OPAC Status and Location combination.
<b>Fulfillment for (Level 1)</b>	For items held by Level 1, check when you want to display the <b>Request Item</b> button.
<b>Fulfillment for (Level 2)</b>	For items held by Levels 1 AND 2, check when you want to display the <b>Request Item</b> button.
<b>Fulfillment for (Level 3)</b>	For items held by Levels 1 AND 3, check when you want to display the <b>Request Item</b> button.
<b>Fulfillment for (Level 4)</b>	For items held by Level 1 AND WorldCat, check when you want to display a request button.
<b>FullText OpenURL</b>	Choose whether to display the Full Text OpenURL Resolver for items with this OPAC Status and Location combination.

**Note:** Depending on your institution's configuration, all columns may not be displayed.

### To configure column options:

Step	Action	Result
1	Click <b>column options</b> .	A pop-up window appears.
2	Choose which column options you would like to see by clicking the <b>Show</b> and <b>Hide</b> buttons.	
3	For the columns listed, choose which logic to apply when determining what buttons or links should display based on the statuses and locations retrieved from the OPAC for a given item. <b>Note:</b> A circulating status is any status/location row that has a Status Treatment defined as "available" or "unavailable".	The table will be reconfigured for the chosen options.

## Table row options:

- To copy the configuration for this item type and paste the settings to another item type for your institution, click **copy to** and select an option from the drop-down list.
- To add rows, click either the **add 1 row** or **add 10 rows** buttons.
- To delete rows, click the check box next to the row you would like to remove, then click **delete selected row(s)**.

## Using Local Holdings Records (LHRs) for Serial Information

When the LHR option is selected, the following information from an LHR is displayed in WorldCat Local:

- Online links (856)
- Summary holdings data
- Call number (852 \$k, h, i, m – in this order)

When the LHR is not used or not found, WorldCat Local searches the local OPAC for availability information. To display LHRs for serial, article and e-serial information, check the box under the **serial** tab at the bottom of the screen. The check box will automatically be selected on the **article** and **e-serial** tabs. Then complete the [Holdings Code Translation Table](#).

For information about loading Local Holdings Records, please see:

<http://www.oclc.org/batchprocessing/options/holdings/localdatarecords/>.

When you are finished, click **Cancel** to start over, or **Save Changes** to save and continue.

For further information, please see our [tutorials](#).

## Holding Codes Translation Table (WorldCat Local only)

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Use this screen to customize your OCLC Holding Code Location information.

When OCLC retrieves Local Holding Records (LHRs) for an item, we will display the "Location" of the item in the availability area in your worldcat.org. If you would like to display a user-friendly location name instead of a Holding Code from the LHR, you can customize the display.

Information on this screen is only used if you have selected to use Local Holdings Records. For information about loading Local Holdings Records, please see:

<http://www.oclc.org/batchprocessing/options/holdings/localdatarecords/>.

### Holding Codes Translation Table

Please list Holding Codes with the location that you want displayed for the code, by entering the Default Symbol, Holding Symbol, four-digit Holding Code, Display Name, Shelving Scheme and the Shelving Location. If you do not know your holding library codes, send an e-mail to [profiling@oclc.org](mailto:profiling@oclc.org). Include the following:

- Contact name
- E-mail address
- Phone number
- Library's name
- OCLC institution symbol

If you are adding a new holding library code, also include the following:

- The new four-character symbol
- The name/description

#### Table row options:

- To add rows, click either the **add 1 row** or **add 10 rows** buttons.
- To delete rows, click the check box next to the row you would like to remove, then click **delete selected row(s)**.
- You can change the data in the table by typing directly in the table cells.

When you are finished, click **Cancel** to start over, or **Save Changes** to save and continue.

## Local and Enhanced Content

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Use this screen to display optional content to your end users.

### Syndetic Solutions Enrichment Content (if applicable)

**(Note: Only applicable to WorldCat Local full subscribers in the U.S.)**

Use this feature to show or hide evaluative content elements from Syndetic Solutions within WorldCat Local. Your Syndetic Solutions' Client Code is shown.

**Note:** Please see [Syndetic Solutions content in WorldCat Local](#) for complete details.

### Local Data Visibility (if applicable)

Use this feature to enable visibility of local bibliographic data, along with Master bibliographic data on the Detailed Record page of WorldCat Local.

**Note:** To use this feature, you must have loaded and stored your local bibliographic data at OCLC. You should then be able to see the option to enable visibility of this data. Or you may contact [WorldCatLocalIM@oclc.org](mailto:WorldCatLocalIM@oclc.org) if you wish to enable this feature.

### Local and Enhanced Content

You can optionally display some content to your end users.

#### Local Data Visibility

Enable visibility of Local Bib. Data along with master Bib. Data on the Detailed Record Page

For further information on Local bibliographic data, see the [Batchload Solutions for Bibliographic Records Quick Reference](#).

When you are finished, click **Cancel** to start over, or **Save Changes** to save and continue.

## Full Text and Open Access Links

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Use this screen to set the appearance of full text links in WorldCat Local.

### Configure the display of full text links in WorldCat Local:

Check the appropriate check boxes to display links in WorldCat Local.

**Note:** Options may differ, depending on your subscription and settings.

### Detailed Record page – display the following links:

- Links from the WorldCat knowledge base to full text content.  
**Note:** For some users, this link will be:  
Links from the WorldCat knowledge base to open access content/free content.

The link appears only for items from the WorldCat knowledge base for which you have identified a subscription. Link display order can be configured in the [Provider Preferences](#) section of the WorldCat knowledge base Configuration Settings module.

### Full-text Limiter in WorldCat Local

The presence of the full-text limiter on the Advanced Search and search results screens is tied to links from the WorldCat knowledge base to full text content. Links from WorldCat knowledge base must be enabled for the full-text limiter to display.

To turn on the full-text limiter, you must select the “Links from the WorldCat knowledge base to full text content” option. If you have already enabled these links you **must** resave the module in the Service Configuration to trigger the full-text limiter.

The full-text limiter limits to full text your library subscribes to as indicated by your holdings in the WorldCat knowledge base. The knowledge base is included in your cataloging subscription. Click [here](#) to find out how to use the knowledge base.

- Links from LHRs (if applicable)  
**Note:** LHRs can be enabled in the [OPAC Statuses, Locations, and Circulation Policies](#) module.

### Search Results page – display the following links:

- Links from the WorldCat knowledge base to full text content.  
**Note:** For some users, this link will be:  
Links from the WorldCat knowledge base to open access content/free content.  
The link appears only for items from the WorldCat knowledge base for which you have identified a subscription.
- Links from LHRs (if applicable)  
**Note:** LHRs can be enabled in the [OPAC Statuses, Locations, and Circulation Policies](#) module.
- Master WorldCat record 856 and 956 links to open access content/free content  
Some examples of providers include:
  - .gov/.edu documents (i.e., GPO.gov, ERIC, etc.)
  - Hathi Trust Digital Library
  - Internet Archive (Archive.org)/Project Gutenberg (Gutenberg.org)
  - WorldCat Digital Collection Gateway (i.e., CAMIO, OAIster, ContentDM, etc.)
  - Other (i.e., MARC 506)

When you are finished, click **Cancel** to start over, or **Save Changes** to save and continue.

## ILS Support and Maintenance

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Use this screen to supply a feedback e-mail address, and describe the level of system support you provide (if available).

### User Support

WorldCat.org will forward any patron feedback sent through the WorldCat.org Feedback form to the institution purchasing this product. Librarian feedback will be sent to [OCLC Customer Support](#).

**Forward feedback to this email:** Provide an email address for feedback to your institution.

### System Support and Maintenance (if available)

<b>Select your time zone</b>	Choose a time zone from the drop-down list.
<b>Regular support hours</b>	Click <b>Add another regular support hours timeframe</b> to add your hours.
<b>After-hours support</b>	Click <b>Add another after-hours support timeframe</b> to add your hours.
<b>Do you have a standard, scheduled downtime for your system?</b>	Click <b>Add another scheduled downtime timeframe</b> to add your hours.
<b>Do you have a service unavailable page during downtime?</b>	Supply the URL for your service unavailable Web page, if applicable. For example, <a href="http://www.lib.edu/nopagefound.html">http://www.lib.edu/nopagefound.html</a> .
<b>Do you have a webpage for status updates during downtime?</b>	Supply the URL for your status updates Web page, if applicable. For example, <a href="http://www.lib.edu/nopagefound.html">http://www.lib.edu/nopagefound.html</a> .
<b>Search URL that OCLC may use to test to the OPAC</b>	Supply the URL that OCLC may use to test your OPAC. Must include a valid OCLC search (for example, <a href="http://www.lib.edu/search/o70176934">http://www.lib.edu/search/o70176934</a> ).
<b>Additional notes</b>	Any additional information you wish to supply.

When you are finished, click **Cancel** to start over, or **Save Changes** to save and continue.

For further information, please see our [tutorials](#).

### Licensed Content and Databases

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Use this screen to select databases that your users can search.

#### Select Databases that a user can search in your WorldCat.org

Users will be able to search any of the selected databases by using Advanced Search in xxx.worldcat.org. If no databases are selected, WorldCat.org will automatically be the database a user can search. A message appears with a link to add databases.

**Searchable databases on xxx.worldcat.org:** Selected databases appear in the list.

#### To change your settings:

Step	Action	Result
1	Click <b>add/remove databases</b> to see a list of available databases.	The Select database to search window displays.
2	Click the check box next to each database to be included. <b>Note:</b> If your institution does not have an unlimited subscription to a database, a warning message will appear. If you would like to continue and make this database searchable, enter your authorization and password and click <b>Continue</b> . If you click <b>Cancel</b> , the database will not be added.  If you wish to select non-OCLC licensed databases, you may select those but may be asked to provide a username and password for each. Databases with a double asterisk (**) require credentials.	The database name appears in the right column under <b>Selected Databases</b> .
3	When you select a database, it appears with an icon. The default icon  means that the database uses holdings in WorldCat to determine if your library holds an item. <b>Note:</b> If the database can be treated as held, you can switch the icon to elevate your holdings in search results. Mouse over the icon to see if it can be switched. The icon will turn gray and change to  if it can be switched.	
4	Click <b>Done</b> when you are finished.	A Warning message appears. <b>Note:</b> This message does not currently apply to WorldCat Local customers. This message reflects our development efforts to begin allowing API access to the central index and data available for search through an API. We continue to work on this type of access to improve your ability to use WorldCat Local data in your library. We will inform you when this functionality is available to you.
5	Click <b>Continue</b> to, or click <b>Cancel</b> to start over.	You are returned to the Licensed Content and Databases screen.

## Metasearch Content

### Organize your databases (optional)

You can create, name, and modify custom groups of databases to assist users in selecting the appropriate resources to search. A database may appear in more than one group. In order for a database to appear in a group, you must have selected it to appear on xxx.worldcat.org in the [Select Databases](#) section.

**Note:** You must have at least two databases selected to create a group. If no groups have been created, a message will display.

#### Groups

If you have two or more databases selected, you may create a new group.

#### To create a group:

Step	Action	Result
1	Click <b>Create a new database group</b> .	The <b>Group Name</b> and <b>Databases in this group</b> fields appear. All selected databases appear in the drop-down menu.
2	Type a <b>Group Name</b> in the space provided.	A confirmation message appears to tell you if the name is available.
3	Click the check box next to each database to be included.	
4	Click <b>save group</b> .	The new group information appears.

If you have created groups, you may edit a group from this screen.

#### To edit a group:

Step	Action	Result
1	Click <b>edit group</b> .	The <b>Group Name</b> and <b>Databases in this group</b> fields become editable.
2	Change the <b>Group Name</b> , if desired.	
3	Click the check box next to each database to be included or excluded.	
4	Click <b>save group</b> , or <b>cancel changes</b> to start over.	The new group information appears.

**Group display order:** If you have two or more groups, you can define a display order. Highlight a group name from the list and use the arrows to order the custom groups based on how you would like them displayed to the user. Users will be able to see all databases ordered alphabetically below the groups.

**Default database/group:** Choose the default database/group that you would like to have displayed to users from the drop-down list.

When you are finished, click **Cancel** to start over, or **Save Changes** to save and continue.

## Global Policies

### Global Policies

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Use this screen to set your resource sharing policies. Select the options to indicate information about your resource sharing policies and charges.

**Note:** These general policies may not apply for all inter-lending and are subject to change.

#### Copy Policy

Choose the check box for each policy that applies. You may select only one button for fees.

**Note:** The default setting is **A fee** is charged.

#### Loan Policy

Choose the check box for each policy that applies. You may select only one button for fees.

**Note:** The default setting is **A fee** is charged.

#### Lending URL:

Step	Action	Result
1	Type the URL for your institution's lending policies.	
2	Click <b>test URL</b> to make sure the URL is valid.	If accepted, a confirmation message appears. If not, an error message appears.
3	If necessary, provide a different URL and re-test the link.	

When you are finished, click **Cancel** to start over, or **Save Changes** to save and continue.

## Mobile Client

### Contact Information

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Use this screen to set contact information for your WorldCat Mobile users.

Step	Action	Result
1	Click <b>Yes</b> to display ONLY a search box on your Mobile home page. OR Click <b>No</b> to display library details, such as contact information, library hours and address.	If you choose <b>Yes</b> , only the <b>Library's Mobile Home Page</b> field is configurable under <a href="#">Library URLs</a> .
2	Click <b>Save Changes</b> to save and continue, or <b>Cancel</b> to start over.	A confirmation message appears.

### Contact Information

Your institution's contact information is listed. Contact information is acquired from the WorldCat Registry:

- Changes to your contact information can be made in the WorldCat Registry's [Name and Location](#) module.
- Changes to your days and hours of operation can be made in the WorldCat Registry's [Open Hours](#) module.

## Mobile Client

### Library URLs

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Use this screen to set URLs and RSS feeds to your library's catalog for your WorldCat Mobile users.

**Note:** Required fields are marked with an asterisk (\*).

#### Mobile Client Library URLs

Step	Action	Result
1	Enter a URL for your institution's mobile home page in the field provided.	
2	Click <b>Test</b> next to the field to check if it displays properly.	The Web page opens in a new browser window.
3	Select either the option to use the URL configured in the <a href="#">User Interface Options</a> module, or the <a href="#">Name and Location</a> module.	
4	Click <b>Save Changes</b> to save and continue, or <b>Cancel</b> to start over.	A confirmation message appears.

**Note:** If you chose **Yes** under [Contact Information](#), only the **Library's Mobile Home Page** field is configurable on this screen.

When you are finished, click **Cancel** to start over, or **Save Changes** to save and continue.

## Export EasyBib Data

If you have subscribed to the EasyBib service (either the EasyBib Library Edition or the School Edition), this module will appear. Use this screen to set up export options for EasyBib. The **Cite/Export** option appears on an item's Detailed Record screen in WorldCat Local. Click [here](#) for more information on the EasyBib citation management service.

### Other Citation Exports

If you've subscribed to the EasyBib service and would like to remove other export options, use this section to disable other citation exports. Then click **Save Citation Settings**.

<b>Disable citation export to RefWorks</b>	Click <b>Yes</b> or <b>No</b> to disable citation exports to <a href="#">RefWorks</a> .
<b>Disable citation export to Endnote</b>	Click <b>Yes</b> or <b>No</b> to disable citation exports to <a href="#">Endnote</a> .

**Date of the last export to EasyBib:** The date and time of your last export to EasyBib is shown.

### IP Range

IP addresses that you have set in the WorldCat Registry's [IP Addresses](#) module are listed. Click the check box next to each IP address that you would like to export to EasyBib.

### User Interface Options

User Interface Options are acquired from your settings in other OCLC Service Configuration modules. After editing or saving any changes in that module, return to this page to set your EasyBib options. Click the check box next to each option to export it to EasyBib.

<b>Branding Information</b>	Branding information from the <a href="#">User Interface Options</a> module is shown. Set your primary and secondary colors for EasyBib.
<b>Custom Web Links</b>	Custom web links from the <a href="#">User Interface Options</a> module are shown.
<b>Other WorldCat Information</b>	Other Web links from the <a href="#">User Interface Options</a> module are shown.
<b>Library Information</b>	Contact information from the WorldCat Registry's <a href="#">Name and Location</a> module is shown.
<b>Online Catalog</b>	Online catalog data from the WorldCat Registry's <a href="#">Online Catalog</a> module is shown.
<b>Open URL</b>	OpenURL Resolvers from the WorldCat Registry's <a href="#">OpenURL Resolvers</a> module is shown.
<b>Virtual Reference</b>	Virtual reference data from the WorldCat Registry's <a href="#">Virtual Reference</a> module is shown.

When you are finished, click **Export Data** to export your settings, or **Cancel** to start over.

**Note:** It will generally take 3-5 days for your service to be live on [www.easybib.com](http://www.easybib.com).

## WMS Circulation

### Patron Type Policy

Use this screen to set patron types for your users.

#### To select a Patron Type:

Step	Action	Result
1	Choose the desired Patron Type from the drop-down list.	
2	Click <b>Go</b> .	The screen refreshes to update the fields.

#### To add a new Patron Type:

Step	Action	Result
1	Click <b>Add New Patron Type</b> to start with empty fields, or choose an existing Patron Type and type over the <b>Patron Type Name</b> field.	
2	The default setting for all fields is <b>No Limit</b> . Click the check box next to each field to add a limit. <b>Note:</b> Required fields are marked with an asterisk (*).	
3	When you are finished, click <b>Save as New Patron Type</b> .	A pop-up confirmation window appears.
4	Click <b>Save</b> , or click <b>Cancel</b> to go back. <b>Note:</b> An error message appears if the name you have chosen is already in use.	A confirmation message appears.

#### To delete a Patron Type:

Step	Action	Result
1	Choose the Patron Type you want to delete, and click <b>Delete Patron Type</b> .	A pop-up confirmation window appears.
2	Click <b>Delete</b> , or click <b>Cancel</b> to go back.	A confirmation message appears.

#### Patron Type Policy settings:

<b>Patron Type Name</b>	Type of patron.
<b>Max Overdue Count</b>	Maximum number of overdue items.
<b>Max amount of Waived bills</b>	Maximum dollar amount that can be waived.
<b>Max number claimed lost</b>	Maximum number of items that a patron can claim as lost.
<b>Max number claimed returned</b>	Maximum number of items that a patron can claim as returned.
<b>Max number claimed never had</b>	Maximum number of items that a patron can claim they never had.
<b>Total Loan Value Limit</b>	Total dollar value of all loaned items.
<b>Outstanding Bill Value Limit</b>	Total dollar value of all outstanding loaned items.

When you are finished, click **Cancel** to start over, or **Save** to save and continue.


## WMS Circulation

### Location Policy

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You must first configure settings on the [Holding Codes Translation Table](#) before using this screen. Data from the [Holding Codes Translation Table](#) is automatically populated in the drop-down fields on this screen.

#### To change or delete a Location Policy:

Step	Action	Result
1	Change the fields as desired.	
2	Click <b>Save</b> , or click <b>Cancel</b> to start over.	A confirmation message appears.
3	Click the delete symbol  to delete a row.	A confirmation message appears.

#### To add a new Location Policy:

Step	Action	Result
1	Click <b>Add new Location Policy</b> .	A new row appears at the bottom of the screen.
2	Confirm or change the fields as desired.	
3	Click <b>Save</b> , or click <b>Cancel</b> to erase the row.	A confirmation message appears.

#### Location Policy settings:

Field	Description	Corresponding field in the Holding Codes Translation Table
<b>Holding Location</b>	Branch library where item is normally held.	Holding Code.
<b>Shelving Location</b>	The item's shelving location.	Shelving Location.
<b>Material Format</b>	<a href="#">Item type</a> .	
<b>Reshelving Period</b>	The amount of time before the item is reshelved.	
<b>Availability fields</b>		
<b>Available</b>	Check to show if the item is available.	
<b>Will Fulfill Hold</b>	Check to show if the item is able to be held.	
<b>Can Override Hold</b>	Check to show if a hold on this item can be overridden.	

**Note:** **All** is the default setting if no other value is chosen. In this case, "**All**" means everything not specified in other fields.

When you are finished, click **Cancel** to start over, or **Save** to save and continue.

## WMS Circulation

### Loan Limit Policy

Use this screen to set loan limits for your patrons.

#### To select a Loan Limit Policy:

Step	Action	Result
1	Choose the desired Loan Limit Policy from the drop-down list.	
2	Click <b>Go</b> .	The screen refreshes to update the fields.

#### To add a new Loan Limit Policy:

Step	Action	Result
1	Click <b>Add new Loan Limit Policy</b> to start with empty fields, or choose an existing Loan Limit Policy and type over the <b>Loan Limit Policy Name</b> field.	
2	Complete the desired fields. <b>Note:</b> Required fields are marked with an asterisk (*).	
3	When you are finished, click <b>Save as new Loan Limit</b> .	A pop-up confirmation window appears.
4	Click <b>Save</b> , or click Cancel to go back. <b>Note:</b> An error message appears if the name you have chosen is already in use.	A confirmation message appears.

#### To delete a Loan Limit Policy:

Step	Action	Result
1	Choose the Loan Limit Policy you want to delete, and click <b>Delete Loan Limit Policy</b> .	A pop-up confirmation window appears.
2	Click <b>Delete</b> , or click <b>Cancel</b> to go back.	A confirmation message appears.

#### Loan Limit Policy settings:

<b>Loan Limit Policy Name</b>	Name of the loan limit policy.
<b>Verified Loan Count</b>	Number of loans placed by a verified patron.
<b>Verified Loan Value Limit</b>	Dollar limit of a loaned item's value for a verified patron.
<b>Verified Renew Time Limit</b>	Number of times a loan can be renewed by a verified patron.
<b>Unverified Loan Count Limit</b>	Number of loans placed by an unverified patron.
<b>Unverified Loan Value Limit</b>	Dollar limit of a loaned item's value for an unverified patron.
<b>Unverified Renew Time Limit</b>	Number of times a loan can be renewed by an unverified patron.

When you are finished, click **Cancel** to start over, or **Save** to save and continue.


### Loan Limit Matrix

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You must first configure settings on the [Patron Type Policy](#) and [Loan Limit Policy](#) screens before using this screen. Data from the [Patron Type Policy](#) and [Loan Limit Policy](#) screens is automatically populated in the drop-down fields on this screen.

Status	Description
<b>Patron Type</b>	The patron type, as set on the <a href="#">Patron Type Policy</a> screen.
<b>Material Format</b>	<a href="#">Item type</a> . <b>Note:</b> <b>All</b> is the default setting if no other value is chosen. In this case, "All" means everything not specified in other fields.
<b>Holding Location</b>	Branch library where item is normally held.
<b>Loan Limit Policy</b>	Loan limit policy, as set on the <a href="#">Loan Limit Policy</a> screen.

**Table row options:**

- To add rows, click either the **add 1 row** or **add 10 rows** buttons.
- To delete rows, click the delete symbol .

When you are finished, click **Cancel** to start over, or **Save** to save and continue.

## WMS Circulation

### Loan Policy

Use this screen to set loan policies for your users.

#### To select a Loan Policy:

Step	Action	Result
1	Choose the desired Loan Policy from the drop-down list.	
2	Click <b>Go</b> .	The screen refreshes to update the fields.

#### To add a new Loan Policy:

Step	Action	Result
1	Click <b>Add new Loan Policy</b> to start with empty fields, or choose an existing Loan Policy and type over the <b>Loan Policy Name</b> field.	The screen refreshes with empty fields.
2	Complete the desired fields. <b>Note:</b> Required fields are marked with an asterisk (*).	
3	When you are finished, click <b>Save as new Loan Policy</b> .	A pop-up confirmation window appears.
4	Click <b>Save</b> , or click <b>Cancel</b> to go back. <b>Note:</b> An error message appears if the name you have chosen is already in use.	A confirmation message appears.

#### To delete a Loan Policy:

Step	Action	Result
1	Choose the Loan Policy you want to delete, and click <b>Delete Loan Policy</b> .	A pop-up confirmation window appears.
2	Click <b>Delete</b> , or click <b>Cancel</b> to go back.	A confirmation message appears.

#### Loan Policy settings:

<b>Loan Policy Name</b>	Name of the loan policy.
<b>Loan Period</b>	Standard loan period in minutes, hours, days, weeks or months.
<b>Loan Fixed Due Date(s)</b>	Click <b>Add New Term End Date</b> to override the Loan Period with another due date.
<b>Loan Fixed Bill</b>	A preset monetary value applied to the patron's account when material is checked out.
<b>Renew Fixed Bill</b>	A preset monetary value applied to the patron's account when material is renewed.
<b>Overdue Fixed Bill</b>	A preset monetary value applied to the patron's account when overdue material is returned.
<b>Overdue Periodic Bill</b>	A variable monetary value applied to the patron's account when an item checked out to the patron is overdue.
<b>Recalled Periodic Bill</b>	A variable monetary value applied to the patron's account when an item checked out to the patron is recalled by the library.

## WMS Circulation

<b>Recalled Fixed Bill</b>	A preset monetary value applied to the patron's account when an item checked out to the patron is recalled by the library.
<b>Circulates</b>	Choose <b>Yes</b> or <b>No</b> from the drop-down list to show if items with this Loan Policy circulate.
<b>Overrideable</b>	Choose <b>Yes</b> or <b>No</b> from the drop-down list to show if loans for items with this Loan Policy can be overridden.
<b>Grace Period</b>	Grace period for items in minutes, hours, days, weeks or months.
<b>Recall Due Period</b>	Standard due period for recalled items, in minutes, hours, days, weeks or months.
<b>Recall Due Grace Period</b>	Grace period for recalled items (minutes, hours, days, weeks, months).

When you are finished, click **Cancel** to start over, or **Save** to save and continue.

## Loan Policy Map

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You must first configure settings on the [Patron Type Policy](#) and [Loan Policy](#) screens before using this screen. Data from the [Patron Type Policy](#) and [Loan Policy](#) screens is automatically populated in the drop-down fields on this screen.

**Note:** The Loan Policy Map reads data from top to bottom, left to right, until an exact match is found.

Status	Description
<b>Patron Type</b>	The patron type, as set on the <a href="#">Patron Type Policy</a> screen.
<b>Material Format</b>	<a href="#">Item type</a> .
<b>Holding Location</b>	Branch library where item is normally held.
<b>Shelving Location</b>	The item's shelving location.
<b>Loan Policy</b>	Loan policy, as set on the <a href="#">Loan Policy</a> screen.

**Note:** **All** is the default setting if no other value is chosen. In this case, "**All**" means everything not specified in other fields.

**Table row options:**

- To add rows, click either the **add 1 row** or **add 10 rows** buttons.
- To delete rows, click the delete symbol .
- To rearrange the order of rows, click the up and down arrow symbols  .

When you are finished, click **Cancel** to start over, or **Save** to save and continue.

## WMS Circulation

### Billing Reason

Use this screen to set reasons for billing, other than standard billing fees for items. For example, fees for library cards, etc.

#### To select a Bill Reason:

Step	Action	Result
1	Choose the desired Bill Reason from the drop-down list.	
2	Click <b>Go</b> .	The screen refreshes to update the fields.

#### To add a new Bill Reason:

Step	Action	Result
1	Click <b>Add new Bill Reason</b> to start with empty fields, or choose an existing Bill Reason and type over the <b>Bill Reason Name</b> field.	
2	Complete the desired fields. <b>Note:</b> Required fields are marked with an asterisk (*).	
3	When you are finished, click <b>Save as new Bill Reason</b> .	A pop-up confirmation window appears.
4	Click <b>Save</b> , or click <b>Cancel</b> to go back. <b>Note:</b> An error message appears if the name you have chosen is already in use.	A confirmation message appears.

#### To delete a Bill Reason:

Step	Action	Result
1	Choose the Bill Reason you want to delete, and click <b>Delete Bill Reason</b> .	A pop-up confirmation window appears.
2	Click <b>Delete</b> , or click <b>Cancel</b> to go back.	A confirmation message appears.

#### Bill Reason settings:

<b>Bill Reason Name</b>	Name of the bill reason.
<b>Requires Hold Request</b>	A bill for this item must have a hold request. <b>Example:</b> A recalled item that is overdue and is now billed.
<b>Requires Item</b>	A bill for this item requires that the item is returned. <b>Example:</b> An overdue item that has been accruing fines is returned and billed.
<b>None</b>	A bill that does not require an item or a hold, such as for a courtesy copy fee.

When you are finished, click **Cancel** to start over, or **Save** to save and continue.

## WMS Circulation

### Payment Method

Use this screen to select accepted billing payment methods.

#### To select a Payment Method:

Step	Action	Result
1	Choose the desired Payment Method from the drop-down list.	
2	Click <b>Go</b> .	The screen refreshes to update the fields.

#### To add a new Payment Method:

Step	Action	Result
1	Click <b>Add new Payment Method</b> to start with empty fields, or choose an existing Payment Method and type over the <b>Payment Method Name</b> field.	
2	Complete the desired fields. <b>Note:</b> Required fields are marked with an asterisk (*).	
3	When you are finished, click <b>Save as new Payment Method</b> .	A pop-up confirmation window appears.
4	Click <b>Save</b> , or click <b>Cancel</b> to go back. <b>Note:</b> An error message appears if the name you have chosen is already in use.	A confirmation message appears.

#### To delete a Payment Method:

Step	Action	Result
1	Choose the Payment Method you want to delete, and click <b>Delete Payment Method</b> .	A pop-up confirmation window appears.
2	Click <b>Delete</b> , or click <b>Cancel</b> to go back.	A confirmation message appears.

#### Payment Method settings:

<b>Payment Method Name</b>	Name of payment method, such as Cash, Visa, etc,
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When you are finished, click **Cancel** to start over, or **Save** to save and continue.

## WMS Circulation

### Bill Structure

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Use this screen to set up billing structures for your users.

#### To select a Bill Structure:

Step	Action	Result
1	Choose the desired Bill Structure from the drop-down list.	
2	Click <b>Go</b> .	The screen refreshes to update the fields.

#### To add a new Bill Structure:

Step	Action	Result
1	Click <b>Add new Bill Structure</b> to start with empty fields, or choose an existing Bill Structure and type over the <b>Bill Structure Name</b> field.	
2	Complete the desired fields. <b>Note:</b> Required fields are marked with an asterisk (*).	
3	When you are finished, click <b>Save as new Bill Structure</b> .	A pop-up confirmation window appears.
4	Click <b>Save</b> , or click <b>Cancel</b> to go back. <b>Note:</b> An error message appears if the name you have chosen is already in use.	A confirmation message appears.

#### To delete a Bill Structure:

Step	Action	Result
1	Choose the Bill Structure you want to delete, and click <b>Delete Bill Structure</b> .	A pop-up confirmation window appears.
2	Click <b>Delete</b> , or click <b>Cancel</b> to go back.	A confirmation message appears.

#### Bill Structure settings:

<b>Bill Structure Name</b>	Name of the bill structure.
<b>Bill Reason</b>	A term or phrase that describes the reason for the monetary charge.
<b>Fixed Bill Amount</b>	Fixed monetary amount of the billing structure.
<b>Fee</b>	Standard billing fee.
<b>Periodic Bill Amount</b>	Amount for periodic billing. If you choose this option, a table will appear. <ol style="list-style-type: none"> <li>1. Click <b>Add new period</b> to add a new billing period.</li> <li>2. Complete the table and fields below. <b>Note:</b> The default setting for all fields is <b>No Limit</b>. Click the check box next to each field to add a limit.</li> <li>3. Click <b>Save</b>.</li> </ol>

When you are finished, click **Cancel** to start over, or **Save** to save and continue.

## WMS Circulation

### Hold Limit Policy

Use this screen to set hold limits for items.

#### To select a Hold Limit:

Step	Action	Result
1	Choose the desired Hold Limit from the drop-down list.	
2	Click <b>Go</b> .	The screen refreshes to update the fields.

#### To add a new Hold Limit:

Step	Action	Result
1	Click <b>Add new Hold Limit</b> to start with empty fields, or choose an existing Hold Limit and type over the <b>Hold Limit Name</b> field.	The screen refreshes with empty fields.
2	The default setting for all fields is <b>No Limit</b> . Click the check box next to each field to add a limit. <b>Note:</b> Required fields are marked with an asterisk (*).	
3	When you are finished, click <b>Save as new Hold Limit</b> .	A pop-up confirmation window appears.
4	Click <b>Save</b> , or click <b>Cancel</b> to go back. <b>Note:</b> An error message appears if the name you have chosen is already in use.	A confirmation message appears.

#### To delete a Hold Limit:

Step	Action	Result
1	Choose the Hold Limit you want to delete, and click <b>Delete Hold Limit</b> .	A pop-up confirmation window appears.
2	Click <b>Delete</b> , or click <b>Cancel</b> to go back.	A confirmation message appears.

#### Hold Limit Policy settings:

<b>Hold Limit Name</b>	Name of the hold limit policy.
<b>Verified Hold Count Limit</b>	Limit of number of holds for a verified patron.
<b>Unverified Hold Count Limit</b>	Limit of number of holds for an unverified patron.

When you are finished, click **Cancel** to start over, or **Save** to save and continue.

### Hold Limit Matrix


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You must first configure settings on the [Patron Type Policy](#) and [Hold Limit Policy](#) screens before using this screen. Data from the [Patron Type Policy](#) and [Hold Limit Policy](#) screens is automatically populated in the drop-down fields on this screen.

Status	Description
<b>Patron Type</b>	The patron type, as set on the <a href="#">Patron Type Policy</a> screen.
<b>Material Format</b>	<a href="#">Item type</a> .
<b>Hold Limit Policy</b>	Hold Limit policy, as set on the <a href="#">Hold Limit Policy</a> screen.

**Note:** **All** is the default setting if no other value is chosen. In this case, “**All**” means everything not specified in other fields.

**Table row options:**

- To add rows, click either the **add 1 row** or **add 10 rows** buttons.
- To delete rows, click the delete symbol .

When you are finished, click **Cancel** to start over, or **Save** to save and continue.

## WMS Circulation

### Hold Policy

Use this screen to set hold policies for items.

#### To select a Hold Policy:

Step	Action	Result
1	Choose the desired Hold Policy from the drop-down list.	
2	Click <b>Go</b> .	The screen refreshes to update the fields.

#### To add a new Hold Policy:

Step	Action	Result
1	Click <b>Add new Hold Policy</b> to start with empty fields, or choose an existing Hold Policy and type over the <b>Hold Policy Name</b> field.	
2	Complete the desired fields. <b>Note:</b> Required fields are marked with an asterisk (*).	
3	When you are finished, click <b>Save as new Hold Policy</b> .	A pop-up confirmation window appears.
4	Click <b>Save</b> , or click <b>Cancel</b> to go back. <b>Note:</b> An error message appears if the name you have chosen is already in use.	A confirmation message appears.

#### To delete a Hold Policy:

Step	Action	Result
1	Choose the Hold Policy you want to delete, and click <b>Delete Hold Policy</b> .	A pop-up confirmation window appears.
2	Click <b>Delete</b> , or click <b>Cancel</b> to go back.	A confirmation message appears.

#### Hold Policy settings:

<b>Hold Policy Name</b>	Name of the hold policy.
<b>Default Hold Policy</b>	Standard hold time in minutes, hours, days, weeks or months, or click <b>Unlimited</b> if there is no limit.
<b>Hold Fixed Due Date(s)</b>	Click <b>Add New Term End Date</b> to override the Default Hold Policy with another due date.
<b>Hold Expiration Period</b>	Expiration period for holds in minutes, hours, days, weeks or months.
<b>Bill for placing hold</b>	Choose from the options in the drop-down list to show if holds on items are billed when the hold is placed. <b>Note:</b> These options are defined on the <a href="#">Bill Structure</a> screen.

## WMS Circulation

<b>Bill for picking up hold</b>	Choose from the options in the drop-down list to show if holds on items are billed when the item is picked up. <b>Note:</b> These options are defined on the <a href="#">Bill Structure</a> screen.
<b>Bill for expired hold</b>	Choose from the options in the drop-down list to show if expired holds are billed. <b>Note:</b> These options are defined on the <a href="#">Bill Structure</a> screen.

When you are finished, click **Cancel** to start over, or **Save** to save and continue.

## Hold Policy Map

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You must first configure settings on the [Patron Type Policy](#) and [Hold Policy](#) screens before using this screen. Data from the [Patron Type Policy](#) and [Hold Policy](#) screens is automatically populated in the drop-down fields on this screen.

**Note:** The Hold Policy Map reads data from top to bottom, left to right, until an exact match is found.

Status	Description
<b>Patron Type</b>	The patron type, as set on the <a href="#">Patron Type Policy</a> screen.
<b>Material Format</b>	<a href="#">Item type</a> .
<b>Hold Policy</b>	Hold policy, as set on the <a href="#">Hold Policy</a> screen.

**Note:** **All** is the default setting if no other value is chosen. In this case, "**All**" means everything not specified in other fields.

**Table row options:**

- To add rows, click either the **add 1 row** or **add 10 rows** buttons.
- To delete rows, click the delete symbol .
- To rearrange the order of rows, click the up and down arrow symbols  .

When you are finished, click **Cancel** to start over, or **Save** to save and continue.


## WMS Circulation

### Admin/General

---

Use this screen to set general administrative settings.


#### To change or delete a Material Type:

Step	Action	Result
1	Change the fields as desired.	
2	Click <b>Save</b> , or click <b>Cancel</b> to start over.	A confirmation message appears.
3	Click the delete symbol  to delete a row.	A confirmation message appears.

#### To add a new Material Type:

Step	Action	Result
1	Click <b>Add new material type</b> .	A new row appears at the bottom of the screen.
2	Confirm or change the fields as desired.	
3	Click <b>Save</b> , or click <b>Cancel</b> to erase the row.	A confirmation message appears.

#### To change or delete a Hold Priority:

Step	Action	Result
1	Change the fields as desired.	
2	Click <b>Save</b> , or click <b>Cancel</b> to start over.	A confirmation message appears.
3	Click the delete symbol  to delete a row.	A confirmation message appears.

#### To add a new Hold Priority:

Step	Action	Result
1	Click <b>Add new hold priority</b> .	A new row appears at the bottom of the screen.
2	Confirm or change the fields as desired.	
3	Click <b>Save</b> , or click <b>Cancel</b> to erase the row.	A confirmation message appears.

When you are finished, click **Cancel** to start over, or **Save** to save and continue.

# WorldCat Registry

## Search

---

Use this screen to search for an institution in the WorldCat Registry.

### Basic Search

#### To find an institution:

Step	Action	Result
1	Enter search terms in the <b>Search</b> box.	
2	Click <b>Search</b> . <b>Note:</b> The Search function will find exact matches first, and then close matches.	A confirmation message appears, followed by Search Results.
3	Click the institution name to go to the <a href="#">Profile Summary</a> for that institution. <b>Note:</b> If this is your institution and you need to request authorization, click <b>Authorize me for this record</b> .	

### Advanced Search

Use Advanced Search to search with more specific search terms.

#### To use Advanced Search:

Step	Action	Result
1	Click the <b>Advanced</b> tab.	The Advanced Search fields appear.
2	Enter search terms in any or all of the fields provided.	
3	Click <b>Search</b> . <b>Note:</b> The Search function will find exact matches first, and then close matches.	A confirmation message appears, followed by Search Results.
4	Click the institution name to go to the <a href="#">Profile Summary</a> for that institution. <b>Note:</b> If this is your institution and you need to request authorization, click <b>Authorize me for this record</b> .	

## WorldCat Registry

### Advanced Search fields

**Note:** Required fields are marked with an asterisk (\*).

<b>Name</b>	Name describing your institution. Include identifying information, such as consortium or branch name. examples: Seattle Public Library; BANK OF CHINA, LAW AFFAIRS DEPT
<b>Also Called</b>	Alias name, common name, abbreviation, or English version of a non-English name, if applicable. example: Detroit Area Library Network Also Called: DALNET
<b>Institution Type</b>	Select your institution type from the drop-down list.
<b>Country</b>	Select your country from the drop-down list. ISO standard names, see: <a href="http://www.iso.org/iso/english_country_names_and_code_elements">http://www.iso.org/iso/english_country_names_and_code_elements</a>
<b>City</b>	City of institution's physical location.
<b>State or Province</b>	Select your state or province from the drop-down list, if applicable. Drop-down values are available for the United States, Canada and Australia. ISO standard names, see: <a href="http://www.iso.org/iso/english_country_names_and_code_elements">http://www.iso.org/iso/english_country_names_and_code_elements</a>
<b>Postal Code</b>	Postal or zip code of institution's physical location.

### Search by Identifiers

Use this option to search by [identifier](#).

#### To search by identifiers:

Step	Action	Result
1	Click the <b>Identifiers</b> tab.	The Identifiers fields appear.
2	Enter an identifier to search in the fields provided, or choose one from the drop-down lists.	
3	Click <b>Search</b> . <b>Note:</b> The Search function will find exact matches first, and then close matches.	A confirmation message appears, followed by Search Results.
4	Click the institution name to go to the <a href="#">Profile Summary</a> for that institution. <b>Note:</b> If this is your institution and you need to request authorization, click <b>Authorize me for this record</b> .	

## WorldCat Registry

### Create a New Institution

Use this screen to create a new institution by entering brief, directory-style information, such as name, home page and [identifiers](#).

**Note:** Adding an address is optional.

After completing this screen, please continue to add information to other sections of the profile.

#### To create a new institution:

Step	Action	Result
1	Type information in any or all of the fields provided. <b>Note:</b> Providing as much information as possible (especially an OCLC Institution Symbol and <a href="#">ISIL</a> ) will produce more exact search results (see step 4).	
2	If you wish to add an address, make sure the check box is checked.	The Address fields appear.
3	Click <b>Create</b> . <b>Note:</b> By clicking <b>Create</b> , you agree and consent to the Terms of Service.	A message appears indicating that duplicates are being searched. If possible duplicates are found, the Duplicate Institutions screen appears.
4	If your institution is listed, click the name. <b>OR</b>	The Profile Summary screen appears.
5	If your institution is not listed, click <b>Confirm Create</b> to create the institution. <b>Note:</b> To request authorization, click <b>Authorize me for this record</b> on the <a href="#">Profile Summary</a> screen.	A confirmation message appears, followed by the <a href="#">Name and Location</a> screen.

#### Create a New Institution fields

**Note:** Required fields are marked with an asterisk (\*).

<b>Institution Name</b>	Name describing your institution. Include identifying information, such as consortium or branch name. examples: Seattle Public Library; BANK OF CHINA, LAW AFFAIRS DEPT
<b>Also Called</b>	Alias name, common name, abbreviation, or English version of a non-English name, if applicable. example: Detroit Area Library Network Also Called: DALNET
<b>Institution Type</b>	Select your institution type from the drop-down list.
<b>Home Page URL</b>	Institution or library's main Web site address. example: <a href="http://www.spl.org">www.spl.org</a>
<b>OCLC Institution Symbol</b>	Alpha-numeric identifier issued by OCLC to member institutions (editable by OCLC staff only). example: OCL See: <a href="#">Find an OCLC library</a> To learn more about the OCLC symbol rendered as ISIL, see: <a href="http://www.worldcat.org/webservices/registry/xsl/identifiers">http://www.worldcat.org/webservices/registry/xsl/identifiers</a>

## WorldCat Registry

<b>International Standard Identifier for Libraries (ISIL)</b>	<p>A unique identifier issued by the ISIL Agency to create an identifier to enable unique identification of a library or related institution. An ISIL is made up by two components: a prefix and a library identifier, in that order, separated by a mandatory hyphen. An OCLC symbol can be rendered as ISIL by the addition of the prefix "OCLC" or "O" for technical encoding in cases such as RFID tags. examples: CA-QMCB, OCLC-ABCDE</p> <p>To learn more about the standard see: <a href="http://biblstandard.dk/isil/">http://biblstandard.dk/isil/</a> and <a href="http://www.iso.org/iso/catalogue_detail?csnumber=27979">http://www.iso.org/iso/catalogue_detail?csnumber=27979</a></p> <p>To learn more about the OCLC symbol rendered as ISIL, see: <a href="http://www.worldcat.org/webservices/registry/xsl/identifiers">http://www.worldcat.org/webservices/registry/xsl/identifiers</a></p>
<b>Address fields (optional)</b>	
<b>Type</b>	<p>You can enter up to four addresses:</p> <ul style="list-style-type: none"> <li>• Main address</li> <li>• Business address</li> <li>• Shipping address</li> <li>• Other address</li> </ul>
<b>Street Address 1</b>	<p>Institution's address.</p>
<b>Street Address 2</b>	<p>Other address information, such as P.O. Box, Suite, etc.</p>
<b>City</b>	<p>City of institution's location.</p>
<b>State or Province</b>	<p>Select your state or province from the drop-down list, if applicable. Drop-down values are available for the United States, Canada and Australia. ISO standard names, see: <a href="http://www.iso.org/iso/english_country_names_and_code_elements">http://www.iso.org/iso/english_country_names_and_code_elements</a></p>
<b>Zip or Postal Code</b>	<p>Postal or zip code of institution's location.</p>
<b>Country</b>	<p>Select your country from the drop-down list. ISO standard names, see: <a href="http://www.iso.org/iso/english_country_names_and_code_elements">http://www.iso.org/iso/english_country_names_and_code_elements</a></p>

## WorldCat Registry

### Profile Summary

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This screen lists your institution's information with links to other WorldCat Registry screens for easier editing.

The screen appears after a [Search](#) or after [Creating a New Institution](#).

If this is your institution and you need to request authorization, **Authorize me for this record** will appear.

Step	Action	Result
1	Click <b>Authorize me for this record</b> .	The window expands to include a relationship field.
2	Describe your relationship with the institution in the field provided.	
3	Click <b>Send</b> .	The request is sent to OCLC for verification.
4	You will be contacted by OCLC staff when your authorization is complete.	

If this is your institution and you are authorized, **Edit this record** will appear. Click the link to go to the [Name and Location](#) screen.

# WorldCat Registry

## Name and Location

Use this screen to enter or revise your institution's information, such as physical and postal street addresses, Web sites and telephone numbers.

### Institution Name

Use this section to add or change general information about your institution, and choose whether or not to make your information public.

### Addresses

You can enter up to four addresses:

- Main address
- Business address
- Shipping address
- Other address

#### To add an address:

Step	Action	Result
1	Click <b>Add Address</b> . <b>Note:</b> You may also add a new address by using the <a href="#">Copy</a> function.	The Add New Address screen appears.
2	Complete the fields on the screen: <ul style="list-style-type: none"><li>• Select an address <b>Type</b> from the drop-down list.</li><li>• Type information in the fields provided and select locations from the drop-down lists. <b>Note:</b> After selecting a <b>State or Province</b>, the <b>Country</b> is automatically selected.</li><li>• Entering <b>Latitude</b> and <b>Longitude</b> will enable advanced features like a Map and auto-detection of your time zone. For further information, please see: <a href="#">Map</a> and <a href="#">Open Hours</a>.</li></ul>	
3	Click <b>OK</b> to save or <b>Cancel</b> to start over.	The address appears under <b>Addresses</b> .

#### To edit an address:

Step	Action	Result
1	Click the check box next to the address.	
2	Click <b>Edit Selected</b> .	The Edit Address screen appears.
3	Edit any desired fields.	
4	Click <b>OK</b> to save or <b>Cancel</b> to start over.	The changes are made to the address.

## WorldCat Registry

### To copy an address:

Step	Action	Result
1	Click the check box next to the address.	
2	Click <b>Copy Selected</b> .	The Add New Address screen appears.
3	Edit any desired fields.	
4	Click <b>OK</b> to save or <b>Cancel</b> to start over.	The address appears under <b>Addresses</b> .

### To delete an address:

Step	Action	Result
1	Click the check box next to the address.	
2	Click <b>Delete Selected</b> .	The address is removed.

## Email Addresses

You can enter as many email addresses as you need.

### To add an email address:

Step	Action	Result
1	Click <b>Add Email</b> .	The Add New Email screen appears.
2	Type an email address in the field provided.	
3	Click <b>OK</b> to save or <b>Cancel</b> to start over.	The email address appears under <b>Email Addresses</b> .

### To edit an email address:

Step	Action	Result
1	Click the check box next to the email address.	
2	Click <b>Edit Selected</b> .	The Edit Email screen appears.
3	Edit the email address.	
4	Click <b>OK</b> to save or <b>Cancel</b> to start over.	The changes are made to the email address.

### To delete an email address:

Step	Action	Result
1	Click the check box next to the email address.	
2	Click <b>Delete Selected</b> .	The email address is removed.

## WorldCat Registry

### Phone/Web

Provide information about your telephone numbers and Web access. Click the check box if you have Wifi Access.

### Name and Location fields

**Note:** Required fields are marked with an asterisk (\*).

<b>Institution Name</b>	Name describing your institution. Include identifying information, such as consortium or branch name. examples: Seattle Public Library; BANK OF CHINA, LAW AFFAIRS DEPT
<b>Also Called</b>	Alias name, common name, abbreviation, or English version of a non-English name, if applicable. example: Detroit Area Library Network Also Called: DALNET
<b>Institution Type</b>	Select your institution type from the drop-down list.
<b>Privacy Preferences</b>	Choose <b>Make information public</b> to make your institution's profile public, or <b>Make information private</b> to only have your institution's name and address publicly available.
<b>Address fields</b>	
<b>Type</b>	You can enter up to four addresses: <ul style="list-style-type: none"> <li>• Main address</li> <li>• Business address</li> <li>• Shipping address</li> <li>• Other address</li> </ul>
<b>Street Address 1</b>	Institution's physical address.
<b>Street Address 2</b>	Other address information, such as P.O. Box, Suite, etc.
<b>City</b>	City of institution's physical location.
<b>State or Province</b>	Select your state or province from the drop-down list, if applicable. Drop-down values are available for the United States, Canada and Australia. ISO standard names, see: <a href="http://www.iso.org/iso/english_country_names_and_code_elements">http://www.iso.org/iso/english_country_names_and_code_elements</a>
<b>Zip or Postal Code</b>	Postal or zip code of institution's physical location.
<b>Country</b>	Select your country from the drop-down list. ISO standard names, see: <a href="http://www.iso.org/iso/english_country_names_and_code_elements">http://www.iso.org/iso/english_country_names_and_code_elements</a>
<b>Latitude</b>	Your institution's latitude. It is a set of data derived from an institution's business or mailing address. example: 40.017075,-83.066376 <b>Note:</b> Entering <b>Latitude</b> and <b>Longitude</b> will enable advanced features like a map and auto-detection of your time zone.
<b>Longitude</b>	Your institution's longitude. It is a set of data derived from an institution's business or mailing address. example: 40.017075,-83.066376 <b>Note:</b> Entering <b>Latitude</b> and <b>Longitude</b> will enable advanced features like a map and auto-detection of your time zone.
<b>Email Address</b>	Email address(es) associated with the account.

## WorldCat Registry

### Phone/Web fields

<b>Phone</b>	Preferred format as it is displayed in your country. examples: +1 (614) 764 6000 (US and Canada) + 33 4 55 33 66 77 (France) + 31 71 500 2500 (Netherlands)
<b>Fax</b>	Preferred format as it is displayed in your country. examples: +1 (614) 764 6000 (US and Canada) + 33 4 55 33 66 77 (France) + 31 71 500 2500 (Netherlands)
<b>Home Page</b>	Institution or library's main Web site address. example: <a href="http://www.spl.org">www.spl.org</a>
<b>Information Page</b>	Address of the institution's Web page which lists locations, department, hours, and contact information. example: <a href="http://www.spl.org/default.asp?pageID=branch">www.spl.org/default.asp?pageID=branch</a>
<b>Library Card Form Page</b>	Address of the institution's Web page to sign up for a library card. example: <a href="http://web19.columbuslibrary.org/dpcard/contract.cfm">http://web19.columbuslibrary.org/dpcard/contract.cfm</a>
<b>Wifi Access</b>	Check the check box if Wifi Access is available.

When you are finished, click **Save Changes** to save and continue, or **Cancel** to start over.

## WorldCat Registry

### Map

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Use this screen to set your institution's location on a map. Drag the red marker to specify the institution's physical location, or click **Update Registry** to use the normalized latitude and longitude values for this record. You can set a different location for each address you have set in the WorldCat Registry.

When you are finished, click **Save** to save, or **Cancel** to start over.

# WorldCat Registry

## Open Hours

Use this screen to set your hours of operation.

**Note:** Required fields are marked with an asterisk (\*).

### Time Zone

Click **Auto-Detect Time Zone** to automatically set your time zone.

**Note:** This is based on the institution's address, so you must have an address with geolocation selected on the [Map](#) page.

### Normal Hours

To set hours:

Step	Action	Result
1	Click a day to modify its hours, or click a button to set hours for multiple days.	The Edit Normal Hours screen appears.
2	Complete the fields on the screen: <ul style="list-style-type: none"><li>• Select an <b>Open Status</b> from the drop-down list.</li><li>• Choose hours information.</li></ul>	
3	Click <b>OK</b> to save or <b>Cancel</b> to start over.	The hours appear under <b>Normal Hours</b> .

### Special Hours

To set hours:

Step	Action	Result
1	Click <b>Add Special Hours</b> .	The Add Special Hours screen appears.
2	Complete the fields on the screen: <ul style="list-style-type: none"><li>• Type a description.</li><li>• Choose dates from the calendar.</li><li>• Choose an <b>Open Status</b> from the drop-down list.</li><li>• Choose hours information.</li></ul>	
3	Click <b>OK</b> to save or <b>Cancel</b> to start over.	The hours appear under <b>Special Hours</b> .

To edit hours:

Step	Action	Result
1	Click the check box next to the hours.	
2	Click <b>Edit Selected</b> .	The Edit Special Hours screen appears.
3	Edit any desired fields.	
4	Click <b>OK</b> to save or <b>Cancel</b> to start over.	The changes are made to the hours.

## WorldCat Registry

### To delete hours:

Step	Action	Result
1	Click the check box next to the hours.	
2	Click <b>Delete Selected</b> .	The hours are removed.

### Hours URL Page

To set an online link to your institution's hours page, type a URL in the field provided.

**Note:** Institutions using WorldShare Management Systems need to enter specific hours information.

When you are finished, click **Save Changes** to save and continue, or **Cancel** to start over.

### Open Hours fields

<b>Time Zone</b>	Select a time zone from the drop-down list, or click <b>Auto-Detect Time Zone</b> to automatically set your time zone. <b>Note:</b> This is based on the institution's address, so you must have an address with geolocation selected on the <a href="#">Map</a> page.
<b>Normal Hours</b>	
<b>Open Status</b>	Select a status from the drop-down list.
<b>Opening Time</b>	List the time in hour and minutes. Select AM or PM.
<b>Closing Time</b>	List the time in hour and minutes. Select AM or PM.
<b>Special Hours</b>	
<b>Description</b>	Type a description of your special hours. example: Summer Vacation 2011
<b>Date From/Thru</b>	Choose dates from the calendars provided.
<b>Open Status</b>	Select a status from the drop-down list.
<b>Opening Time</b>	List the time in hour and minutes. Select AM or PM.
<b>Closing Time</b>	List the time in hour and minutes. Select AM or PM.

## WorldCat Registry

### Branches and Affiliates

Use this screen to set up institutions that are subordinate to or serve as extensions of your institution. Current Branch and Affiliate associations are listed on the screen.

**Note:** To be associated, a branch must have its own Registry profile.

#### Add New Branches/Affiliates

##### To add a branch or affiliate:

Step	Action	Result
1	Click the plus symbol (+) to expand the branch option.	
2	Enter search terms in the <b>Search</b> box. <b>Note:</b> The Search function will find exact matches first, and then close matches.	
3	<b>Optional:</b> Click the check box to include inactive records.	
4	Click <b>Search</b> .	A confirmation message appears, followed by Search Results.
5	To see more information about an institution, click the institution name to go to the <a href="#">Profile Summary</a> for that institution.	
6	Click <b>Add As Branch</b> or <b>Add as Affiliate</b> in the <b>Action</b> column to add an institution to your Branches and Affiliates screen.	A confirmation message appears, and the branch or affiliate is added.

##### To delete a branch or affiliate:

Step	Action	Result
1	Click <b>Remove Branch</b> or <b>Remove Affiliate</b> under <b>Branches or Members</b> or <b>Affiliations</b> .	A confirmation message appears, and the branch or affiliate is removed.

# WorldCat Registry

## Contacts

Use this screen to add contact information for key administrative and departmental personnel.

**Note:** The WorldCat Registry will allow you to make this information publicly available. You can also enter personnel who would be of interest only to parties with whom your profile will be shared.

### Contact List

#### To add a contact:

Step	Action	Result
1	Click <b>Add Contact</b> .	The Add New Contact screen appears.
2	Complete the fields on the screen: <ul style="list-style-type: none"><li>• Choose a <b>Role</b> from the drop-down list.</li><li>• Type a <b>Name</b>, and provide other information in the fields provided.</li><li>• Click the check box if you want to make your contact information publicly available.</li></ul>	
3	Click <b>OK</b> to save or <b>Cancel</b> to start over.	The contact appears under <b>Contact List</b> .

#### To edit a contact:

Step	Action	Result
1	Click the check box next to the contact.	
2	Click <b>Edit Selected</b> .	The Edit Contact screen appears.
3	Edit any desired fields.	
4	Click <b>OK</b> to save or <b>Cancel</b> to start over.	The changes are made to the contact.

#### To delete a contact:

Step	Action	Result
1	Click the check box next to the contact.	
2	Click <b>Delete Selected</b> .	The contact is removed.

## WorldCat Registry

### Contact fields

**Note:** Required fields are marked with an asterisk (\*).

<b>Role</b>	Select a role from the drop-down list.
<b>Name</b>	Contact's name, first and last name (surname). <b>Note:</b> Name must be at least two characters.
<b>Email Address</b>	Contact's e-mail address.
<b>Phone</b>	Preferred format as it is displayed in your country. examples: +1 (614) 764 6000 (US and Canada) + 33 4 55 33 66 77 (France) + 31 71 500 2500 (Netherlands)
<b>Fax</b>	Preferred format as it is displayed in your country. examples: +1 (614) 764 6000 (US and Canada) + 33 4 55 33 66 77 (France) + 31 71 500 2500 (Netherlands)
<b>Visible to All</b>	Click the check box to allow a contact to be visible to anyone. <b>Note:</b> If you do not make the choice, contact information will be hidden to general public and available only to parties with whom you share your profile.

When you are finished, click **Save Changes** to save and continue, or **Cancel** to start over.

# WorldCat Registry

## Identifiers

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Use this screen to list identifying codes assigned by OCLC and other industry and standards organizations, if applicable. (The ID assigned by the WorldCat Registry is included.)

### Identifiers

#### To add an identifier:

Step	Action	Result
1	Select an <b>Identifier Type</b> from the drop-down list.	
2	Provide an identifier in the <b>Identifier</b> field.	
3	Click <b>Add</b> .	The identifier appears in the table.

#### To edit an identifier type:

Step	Action	Result
1	Click the <b>Identifier Type</b> .	
2	Choose the correct type from the drop-down list.	The identifier type is changed.

#### To edit an identifier:

Step	Action	Result
1	Click the <b>Identifier</b> .	
2	Provide the correct identifier.	The identifier is changed.

#### To delete an identifier:

Click **Remove** to delete an identifier.

## WorldCat Registry

### Identifier Types

Identifier Type	Description and Example
<b>WorldCat Registry ID</b>	The unique ID assigned by the WorldCat Registry (not editable). example: 21274
<b>Australian Business Number</b>	11-digit unique identifier issued by the Australian Taxation Office that is used by business entities when dealing with the Australian government. example: 48 004 146 338 See: <a href="http://www.ato.gov.au/">http://www.ato.gov.au/</a>
<b>Australian National Union Catalog (NUC)</b>	A unique identifier issued by the National Library of Australia for organizations which contribute information to the Australian National Bibliographic Database (ANBD). Australian National Union Catalog symbol has been recognized as an International Standard Identifier for Libraries (ISIL). example: ANL (National Library of Australia) See: <a href="http://www.nla.gov.au/ilrs/">http://www.nla.gov.au/ilrs/</a>
<b>BIBSYS Library Code (Norway records)</b> (editable by OCLC staff only)	A unique library identifier issued by BIBSYS which is a key supplier of products and services for higher educational institutions, other research institutions in Norway, public administrative institutions and the National Library of Norway. example: xu
<b>British Library Code (UK records)</b>	An internal unique identifier for British Libraries indicating the physical location of the material. Enables British Library customers to convert into names and addresses the library codes they are given in response to location searches. It also indicates each library's supply and charging policies. example: ED/N-2, DB/N-2 See: <a href="http://www.bl.uk/reshelp/atyourdesk/docsupply/help/replycodes/dirlibcodes/">http://www.bl.uk/reshelp/atyourdesk/docsupply/help/replycodes/dirlibcodes/</a>
<b>Federal Employer Identification Number (FEIN) Identifier</b>	A unique nine-digit numeric identifier assigned by the Internal Revenue Service to businesses in the United States. example: 88-1234567
<b>International Standard Identifier for Libraries (ISIL)</b>	A unique identifier issued by the ISIL Agency to create an identifier to enable unique identification of a library or related institution. An ISIL is made up by two components: a prefix and a library identifier, in that order, separated by a mandatory hyphen. An OCLC symbol can be rendered as ISIL by the addition of the prefix "OCLC" or "O" for technical encoding in cases such as RFID tags. examples: CA-QMCB, OCLC-ABCDE To learn more about the standard see: <a href="http://biblstandard.dk/isil/">http://biblstandard.dk/isil/</a> and <a href="http://www.iso.org/iso/catalogue_detail?csnumber=27979">http://www.iso.org/iso/catalogue_detail?csnumber=27979</a> To learn more about the OCLC symbol rendered as ISIL, see: <a href="http://www.worldcat.org/webservices/registry/xsl/identifiers">http://www.worldcat.org/webservices/registry/xsl/identifiers</a>
<b>MARC Organization Code (NUC)</b>	Alphabetic identifier used in Library of Congress National Union Catalog. example: TxLbAMS; RiEpGSL See: <a href="http://www.loc.gov/marc/organizations/">http://www.loc.gov/marc/organizations/</a>
<b>NCES Library Code/LIBID</b>	Alpha-numeric identifier issued by the National Center for Educational Statistics (U.S.) identifying branch level information for Public Libraries. example: 157B08 See: <a href="http://nces.ed.gov/">http://nces.ed.gov/</a>

## WorldCat Registry

<b>NCES Organization Code/FSCS ID</b>	Alpha-numeric organization code issued by the National Center for Educational Statistics (U.S.) for Public Libraries. example: OH0057 See: <a href="http://nces.ed.gov/">http://nces.ed.gov/</a>
<b>NCES IPEDS ID/UnitID</b>	Numeric identifier issued by the National Center for Educational Statistics (U.S.) for Academic Institutions. example: 164924 See: <a href="http://nces.ed.gov/">http://nces.ed.gov/</a>
<b>New Zealand Library Symbol (New Zealand records)</b>	A unique library identifier issued by the National Library of New Zealand. Its primary purpose is to facilitate interloan. New Zealand Library Symbol has been recognized as an International Standard Identifier for Libraries (ISIL). example: WN (National Library of New Zealand, Wellington) See more about ISIL: <a href="http://www.bs.dk/isil/index.htm">http://www.bs.dk/isil/index.htm</a> See: <a href="http://www.natlib.govt.nz/catalogues/directory-of-libraries">http://www.natlib.govt.nz/catalogues/directory-of-libraries</a>
<b>New Zealand Union Catalog Name</b> (editable by OCLC staff only)	A unique library identifier issued by the National Library of New Zealand. example: Porirua Public Library
<b>OCLC Account Name</b> (editable by OCLC staff only)	Account name issued by OCLC to member institutions. This name will be used as your Institution Name unless you want to change it. example: OCLC, Inc.
<b>OCLC Symbol</b> (editable by OCLC staff only)	Alpha-numeric identifier issued by OCLC to member institutions. example: OCL See: <a href="http://www.oclc.org/contacts/libraries/default.asp">http://www.oclc.org/contacts/libraries/default.asp</a> To learn more about the OCLC symbol rendered as ISIL, see: <a href="http://www.worldcat.org/webservices/registry/xsl/identifiers">http://www.worldcat.org/webservices/registry/xsl/identifiers</a>
<b>RCR Code (France records)</b> (editable by OCLC staff only)	A unique numeric library identifier issued by ABES (Agence Bibliographique de l'Enseignement Supérieur) the agency in charge of SUDOC (Système Universitaire de documentation), the Library Union Catalogue for the academic, specialist and Higher Education in France. example: 974112202
<b>SAN Identifier</b>	The Standard Address Number (SAN) is a seven-digit numeric identifier used to identify organizations and businesses interacting with the publishing industry (including book and serial manufacturers, libraries, publishers.) example: 0348277 <a href="http://www.niso.org/kst/reports/standards?step=2&amp;gid=&amp;project_key=97d7bef1a7fda9d9979b2bb1d58812284426eec7">http://www.niso.org/kst/reports/standards?step=2&amp;gid=&amp;project_key=97d7bef1a7fda9d9979b2bb1d58812284426eec7</a>

When you are finished, click **Save** to save and continue, or **Cancel** to start over.

## WorldCat Registry

### Online Catalog

Use this screen to list information about your Web-accessible catalog.

**Note:** WorldCat Registry automatically suggests values for the fields based on a sample search from your catalog. For OCLC member libraries, the online catalog links will be available within 24 hours.

#### Online Catalog Availability

Use this section to select the availability option for your online catalog.

**Note:** If **Not Available** or **Available on Intranet only** are chosen, no other fields are. If you select **Available Online**, fill out the remaining fields on the screen.

#### Suggest Links

Get automatic suggestions for your online catalog information.

#### To get suggested links:

Step	Action	Result
1	Paste a sample URL from your Web catalog in the field provided.	
2	Click <b>Suggest Links</b> .	WorldCat Registry automatically suggests values for the fields under <a href="#">Online Catalog</a> .
3	Continue to <a href="#">Online Catalog</a> , or click <b>Clear Suggested</b> to start over.	

#### Online Catalog

Step	Action	Result
1	Complete the fields on the screen: <ul style="list-style-type: none"><li>Choose a <b>Library System Used</b> from the drop-down list.</li><li>Provide URLs in the fields provided.</li></ul>	
2	Click <b>Test</b> next to the suggested link to check if it displays a holding in your local online catalog.	The Web page opens in a new browser window.
3	Provide a URL for the screen that displays results of an ISBN or ISSN search.	
4	Choose <b>Use 10 Digits</b> or <b>Use 13 Digits</b> for ISBN.	
5	Click <b>Test</b> next to the <b>ISBN</b> , <b>ISSN</b> and <b>OCLC Number</b> fields.	A window opens, showing example numbers for testing.
6	Click <b>Test</b> to display the search, or <b>Cancel</b> to start over.	The Test screen opens.
7	Click the check box if your library configures its catalog to retain the leading zeroes on OCLC numbers.	
8	Choose an option for <b>OCLC Number Prefix</b> , and if applicable, select a custom prefix to be used on all OCLC Numbers.	
9	Provide a URL to conduct an OR search against the local catalog for multiple OCLC numbers which identify the same record (see <a href="#">below</a> ).	

## WorldCat Registry

### Online Catalog fields

<b>Library System Used</b>	Select your vendor from the drop-down list.
<b>Base URL</b>	Main URL for your library's catalog. <b>Note:</b> Only one link can be used per profile. example: <a href="http://catalog.columbuslibrary.org/">http://catalog.columbuslibrary.org/</a>
<b>Online Catalog Direct to ISBN</b>	URL for the screen that displays the results of an ISBN search of your catalog. example: <a href="http://catalog.columbuslibrary.org/?q=isbn:">http://catalog.columbuslibrary.org/?q=isbn:</a>
<b>Online Catalog Direct to ISSN</b>	URL for the screen that displays the results of an ISSN search of your catalog. example: <a href="http://catalog.columbuslibrary.org/?q=issn:">http://catalog.columbuslibrary.org/?q=issn:</a>
<b>e-Serial ISSN Search</b>	URL for the screen that displays the results of an ISSN search of your catalog for electronic serials. example: <a href="http://library.institution.edu/search/i?SEARCH=">http://library.institution.edu/search/i?SEARCH=</a>
<b>Online Catalog Direct to OCLC Number</b>	URL for the screen that displays the results of an OCLC Number search of your catalog. example: <a href="http://vtls.ualibrary.org/cgi-bin/gw/chameleon?host=localhost+1111+DEFAULT&amp;u1=6001&amp;search=KEYWORD&amp;function=INITREQ&amp;t1=">http://vtls.ualibrary.org/cgi-bin/gw/chameleon?host=localhost+1111+DEFAULT&amp;u1=6001&amp;search=KEYWORD&amp;function=INITREQ&amp;t1=</a>
<b>Add Leading Zeroes to the OCLC search Term</b>	Click the check box to add leading zeros to the search term if your library configures its catalog to retain the leading zeros on OCLC numbers.
<b>OCLC Number Prefix</b>	Select which option you prefer for adding a prefix to the OCLC Number. example: OCM
<b>Custom Prefix</b>	Custom prefix to add to all OCLC Numbers.
<b>Online Catalog Direct to Multiple OCLC Numbers</b>	The URL to conduct an OR search against the local catalog for multiple OCLC numbers which identify the same record. This will handle cases where many OCLC numbers have been reduced to a single OCLC number in the WorldCat database and the holdings in the local catalog may not match the holdings in WorldCat. Use {oclc} as a placeholder for where OCLC numbers can be inserted into the URL.

When you are finished, click **Save Changes** to save and continue, or **Cancel** to start over.

# WorldCat Registry

## IP Addresses

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Use this screen to set Internet Protocol (IP) addresses for your institution's computer network.

**Note:** WorldCat Registry does not make this information publicly available.

Some examples of valid IP address ranges include 132.174.95.5, 132.174.95.5-60, 132.174.95-98.\*, 132.174.95.\* and 132.174.\*.\*.

### IP Addresses

#### To add an IP address:

Step	Action	Result
1	Type an <b>IP address</b> in the field provided.	
2	Click <b>Add</b> . <b>Note:</b> If the IP address is not valid or a duplicate, an error message appears.	The IP address appears in the table.

#### To edit an IP address:

Step	Action	Result
1	Click the <b>IP Address</b> .	
2	Provide the correct IP address.	The IP address is changed.

#### To delete an IP address:

Click **Remove** to delete an IP address.

When you are finished, click **Save** to save and continue, or **Cancel** to start over.

## WorldCat Registry

### OpenURL Resolvers

Use this screen to list link resolvers that deliver appropriate electronic resources to a Web user. For more information, please see <http://www.oclc.org/productworks/schema.doc>.

#### To add a new OpenURL Resolver:

Step	Action	Result
1	Click <b>Add New</b> .	The Edit OpenURL Resolver screen appears.
2	Complete the fields on the screen: <ul style="list-style-type: none"><li>Type information in the fields provided.</li><li>Confirm your <b>IP Address</b>, as listed under <a href="#">IP Addresses</a>.</li></ul>	
3	If the <b>IP Address</b> is wrong, click <b>Edit IPs...</b>	The Edit OpenURL Resolver screen appears.
4	Add the correct IP address in the field provided.	
5	Click <b>Add</b> .	The IP address is added to the list.
6	Click <b>Remove</b> to delete any incorrect IP address(es).	
7	Click <b>OK</b> to save or <b>Cancel</b> to start over.	You are returned to the Edit OpenURL Resolver screen.
8	Click a check box to select your <b>OpenURL Version</b> . If it is not listed, click <b>More</b> to see more.	
9	Click a check box to select your <b>Z39.88-2004 Community Profile</b> . If it is not listed, click <b>More</b> to see more.	
10	Click <b>OK</b> to save or <b>Cancel</b> to start over.	

#### To edit an OpenURL Resolver:

Step	Action	Result
1	Click the check box next to the URL.	
2	Click <b>Edit Selected</b> .	The Edit OpenURL screen appears.
3	Edit any desired fields.	
4	Click <b>OK</b> to save or <b>Cancel</b> to start over.	The changes are made to the list.

#### To delete an OpenURL Resolver:

Step	Action	Result
1	Click the check box next to the URL.	
2	Click <b>Delete Selected</b> .	The OpenURL Resolver is removed.

## WorldCat Registry

### OpenURL Resolver fields

**Note:** Required fields are marked with an asterisk (\*).

<b>Base URL</b>	URL of the OpenURL resolver to be used. example: <a href="http://olinks.ohiolink.edu/olinks.php">http://olinks.ohiolink.edu/olinks.php</a>
<b>IP Address</b>	Your institution's IP address is listed, as you have indicated under <a href="#">IP Addresses</a> .
<b>Resolver Link Text</b>	Specify the text that will display as a link leading to the designated OpenURL server.
<b>Resolver Image Location</b>	Specify the URL for an icon that will display as a link leading to the designated OpenURL server.
<b>Institution Domain</b>	The domain name associated with the Institution. example: spl.org
<b>Vendor</b>	Your OpenURL Resolver vendor.
<b>Vendor Product Version</b>	The version of your vendor's product.
<b>OpenURL Version</b>	Select the version of your OpenURL Resolver.
<b>Z39.88-2004 Community Profiles</b>	Select your profile. The optional repeating Z39.88-2004_CommunityProfile element describes which community profiles the Resolver supports for any entity. If this element is omitted, OCLC will assume that no community profiles are supported. These identifiers must be in the pattern of info:ofi/pro:.*

When you are finished, click **Save** to save and continue, or **Cancel** to start over.

## WorldCat Registry

### Virtual Reference

---

Use this screen to list any virtual reference service (such as "Ask a Librarian") offered by the institution.

**Note:** At present, your profile can list only one service.

For more information, please see: [http://liswiki.org/wiki/Virtual\\_reference](http://liswiki.org/wiki/Virtual_reference).

#### To add a virtual reference service:

Step	Action
1	Select a <b>Vendor</b> from the drop-down list.
2	Provide a <b>URL</b> .

When you are finished, click **Save** to save and continue, or **Cancel** to start over.

## WorldCat Registry

### Currency and Locale

---

Use this screen to enter the currency, tax rate, and information about the location of your institution.

<b>Currency</b>	Preferred currency of your location.
<b>Tax Rate</b>	Provide the tax rate used by your institution.
<b>Local Country</b>	The country where your institution is located.
<b>Locale Language</b>	Preferred language of your location.
<b>Locale Variant</b>	Preferred vendor or browser. For example, WIN for Windows, MAC for Macintosh, and POSIX for POSIX.

When you are finished, click **Save Changes** to save and continue, or **Cancel** to start over.

# WorldCat Registry

## Authorized Users

---

Use this screen to authorize users to manage this profile. User accounts from [certain OCLC services](#) are accepted.

**Note:** Removing the user's authorization does not delete the user's account; it only dissociates it from the institution profile.

### To add a user:

Step	Action	Result
1	Click <b>Add a User</b> .	The Add New User screen appears.
2	Add a username from an existing account. <b>Note:</b> If the username is invalid, an error message appears.	
3	Click <b>Add</b> .	The Username, Email Address and Name are added to the list.

### To delete a user:

Step	Action	Result
1	Click the check box next to the Username.	
2	Click <b>Remove Selected Users</b> .	The username is removed.

When you are finished, click **Save** to save and continue, or **Cancel** to start over.

## Share Profile

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Once you have created a profile, the WorldCat Registry interface provides a special Web hyperlink you can send to vendors, consortia, funding bodies, internal staff—any person or organization you believe could benefit from having access to your information. The link is "obfuscated": it displays random characters hiding encoded information, similar to the authenticating links in subscription e-mail newsletters. Anyone you send this link has instant access to a special **read-only** version of your Registry profile, letting them proactively acquire the most up-to-date information about your institution without calling you or requesting action on your part.

The obfuscated link to your institutional profile can be copied, or you can compose an e-mail directly within the page.

### Institution Profile Link

Provides a read-only URL for the profile.

### E-mail a link to this profile

#### To share a profile via e-mail:

Step	Action	Result
1	Complete the fields on the screen.	
2	Click <b>Send</b> .	The e-mail is sent and a confirmation message appears.

### **Download Profile as XML**

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Use this functionality to review your Registry information in full, in XML format. You can also import your profile into Microsoft® Excel. Save your profile onto your computer from a Web browser window, then use the Open command in Excel and locate the file. Excel automatically parses the XML data into spreadsheet columns.

Storing the file locally or on a network location as an Excel file may be preferred in some institutions' workflows. A local copy guards against the misplacing of data when key personnel leave and newly hired staff can't find a paper trail. You may also wish to send the Excel file out for review among staff at chosen time intervals to ensure profile data is accurate.

For developer information, please see:

<http://www.oclc.org/developer/services/worldcat-registry>

### **Profile History**

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This screen lists a record of changes made to your WorldCat Registry profile, including the date/time, user name and changes that were made.

### **WorldCat knowledge base**

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For WorldCat knowledge base instructions, please see the [OCLC Service Configuration Guide for WorldCat knowledge base](#).

## WorldCat Basic API Key

### Request a WorldCat Basic API Key

Use this screen to request keys for the WorldCat Basic API. Information on the WorldCat Basic API is available at: <http://oclc.org/developer/documentation/worldcat-basic-api/using-api>.

#### Generate new API key: WorldCat Basic API

Query WorldCat using OpenSearch and receive results from WorldCat, including formatted citations. Results will include ISBNs and links to WorldCat.org for additional information including holdings.

**Note:** Available to any developer for non-commercial use, up to 1000 queries per day.

Your application for a new key will be associated with your WorldCat account.

Step	Action	Result
1	Choose <b>WorldCat Basic API Key</b> .	
2	Choose <b>Request a WorldCat Basic API Key</b> .	The Generate new API key screen appears, showing your account settings and a link to documentation.
3	Click <b>Next</b> .	Information on your WorldCat Affiliate account information appears.
4	Provide a description of your work in the box provided.	
5	Click the link to read the WorldCat Basic Terms and Conditions.	
6	Click the check box to agree to the terms and conditions.	
7	Click <b>Generate API Key</b> .	A confirmation screen appears. Click the link to view your key.

## WorldCat Basic API Key

### Manage Your Keys

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Once your API key is created, use this screen to manage your API keys.

#### Manage Keys

Your current API key is listed. Click the link to expand the key to use it in your queries. Depending on your settings, other actions may be available under the **Actions** column. For support, contact [BasicAPIhelp@oclc.org](mailto:BasicAPIhelp@oclc.org).

## Find a Library API Key

### Request a Find a Library API Key

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Use this screen to request keys for the Find a Library API. Information on the API is available at: <http://www.oclc.org/developer/documentation/worldcat-registry/using-api>.

#### Generate new API key: Find a Library API

Use "Find A Library" to enable mobile applications to identify libraries within a radius (miles, kilometers, etc.) of the location of the user.

**Note:** Available to any developer for non-commercial use.

Step	Action	Result
1	Choose <b>Find a Library API Key</b> .	
2	Choose <b>Request a Find a Library API Key</b> .	The Generate new API key screen appears, showing your account settings.
3	Click <b>Next</b> .	
4	Provide a description of your work in the box provided.	
5	Click the link to read the terms and conditions.	
6	Click the check box to agree to the terms and conditions.	
7	Click <b>Generate API Key</b> .	A confirmation screen appears. Click the link to view your key.

## Find a Library API Key

### Manage Your Keys

---

Once your API key is created, use this screen to manage your API keys.

#### Manage Keys

Your current API key is listed. Click the link to expand the key to use it in your queries. Depending on your settings, other actions may be available under the **Actions** column.

For support, contact [support@oclc.org](mailto:support@oclc.org).

## Webservice Keys

### Request a Webservice Key

---

Use this screen to request keys for a Webservice. Information on Webservice keys is available at: <http://www.oclc.org/developer/platform/authentication-documentation>.

#### Select environment

Choose whether you are using a production or trial environment:

- Select production environment if you need a key for a production web service for which you have a subscription.
- Trial environment keys can be used for the sandbox/test environment, but will not work for production web services.

#### Choose services

Step	Action	Result
1	Select a service for which you need a key. You may choose more than one service for a single key.	
2	Click <b>Send Request</b> .	
3	Click the link to read the terms and conditions.	
4	Click the check box to agree to the terms and conditions.	
5	Click <b>Generate key request</b> .	A confirmation screen appears. An OCLC representative will contact you once your key has been generated.

## Webservice Keys

### Manage Your Webservice Keys

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All approved API keys associated with your account are listed on this screen.

#### Keys

Your current API key is listed.

For support, contact [support@oclc.org](mailto:support@oclc.org).

## Webservice Keys

### Manage your Webservice Key Requests

---

All approved API key requests associated with your account are listed on this screen.

#### Keys

Your current API key requests are listed. Click the link to expand the key to view details.

For support, contact [support@oclc.org](mailto:support@oclc.org).