Maximizing use of your library’s WorldCat Discovery interface features

Basic and expert searching

Basic searching
By default, a basic search is a “keyword” search. After entering a search term, use the search button or click “Enter” on your keyboard.

Expert searching
Expert searches (that contain index labels and Boolean operators) can be entered in any search box, including in the search boxes on the Advanced Search screen.

Please note: If you use an index label for one search term in the box, you must use index labels for all search terms. Otherwise those without labels will be treated as keyword (kw:).

Index labels and query syntax
- Searching WorldCat Indexes: Find details about query syntax and index labels available for expert searching in the comprehensive guide.
- Searching in WorldCat Discovery (differences from FirstSearch): View a concise guide showing search labels that have changed from FirstSearch.

Searching in “Advanced Search”

Navigating to Advanced Search
Navigate to the Advanced Search screen by clicking on “Advanced Search” below the search bar in your interface. You will see multiple search boxes and a button to “Add or remove databases.”
Indexes available in the Advanced Search drop down menus
Indexes are specific to collections and not all collections use all indexes. Indexes related to all the databases being searched and the most used WorldCat indexes are available in the Advanced Search index dropdown. However, additional WorldCat indexes can be searched by using an index label. Note that changing databases may result in a selected index no longer being valid for the databases selected.

The default indexes for most collections are keyword and title (in that order). If a database doesn’t have the title index, then keyword is substituted. If there is no title or keyword, then the first index in alphabetical order displays.

Adding index search boxes
You can add more index search boxes by clicking on “Add row.” The default index for an additional search box is keyword. If keyword is not available for that database, then the first index, in alphabetical order, displays.

Phrase searching
Phrase indexes are in the index dropdown or can be entered with an index label.

Limiters (Advanced Search - Limit your search)
The available limiters depend on if you are searching a single database, multiple databases, or just WorldCat. However, “Location (Libraries Worldwide, etc)” and “Year” are always available.

Navigating away from the Advanced Search screen and search persistence
Search terms, indexes, and limiters do not persist when navigating from search results back to Advanced Search.

Authentication
If a user is not IP authenticated and is searching restricted databases, he/she will be prompted to authenticate to their library’s network when they click “search.” Alternatively, before searching, the user could click a “Remote access” link enabled by the library.

For instructions to enable this link, see the OCLC Service Configuration guide. See the instructions in the My WorldCat.org – User Interface Options section.

Selecting databases from Advanced Search
Click “Add or remove databases” to open the database selection panel. When the panel is open, it displays an A to Z list of all the databases available. Users can check/uncheck databases as desired.
Note: The databases available in Advanced Search are configured by the library. The settings are in the administrative interface, OCLC Service Configuration. See the WorldCat Discovery settings page for instructions.

Check and un-check “Select all”
The “Select All” check box can be used to select all databases. It can also be used as a way to easily uncheck all databases. Check and then un-check “Select All” to uncheck all databases at one time without having to scroll down and uncheck them one by one.

“Reset to defaults”
Clicking the “Reset to defaults” link replaces the selected databases with the list of default databases as defined in a library’s settings in the administrative interface, OCLC Service Configuration.

“You must select at least one database” warning message
If a user deselects all databases and clicks “Done,” a warning that will appear that says “You must select at least one database.”

Database defaults
The databases available as options reflect what the library has configured in the administrative interface, OCLC Service Configuration. Likewise, the databases selected by default are customized by the library.

Database descriptions
Database descriptions are displayed by clicking the question mark icon beside database names. Descriptions are supplied by OCLC and cannot be changed by individual libraries. Descriptions are displayed in the language of the browser or of the locale.

Database persistence
In a new search session, the default databases are selected. Selected databases persist from one search to the next until the selection is changed. If a user modifies the selections and proceeds with multiple searches, the
databases selected for searching will be whatever databases the user last selected for searching. The databases persist whether additional searches are executed from simple or advanced search.

**Expert method to modify the selected databases for a search**

Users can also modify the databases used for a search by editing the list of database target ID(s) in the URL. Changing the target ID(s) in the URL will automatically update the databases selected in the A to Z list to match your modifications. In other words, if you add or change a database via adding or changing a target ID in the URL, your new database selection will display as a selected database in Advanced Search.

**Example using databases with the following Target IDs:**
- 1271 Business Source Complete
- 1708 Academic Search Complete
- 1953 ERIC

Below is a URL for a search of Business Source Complete as represented by “1271” (databaseList=1271): http://mylibrary.on.worldcat.org/search?queryString=kw%3Alibrary&databaseList=1271&scope=&origPageViewName=pages%2Fadvanced-search-page&submit_search_button=

A second and a third database was added to the search:
...databaseList=1708%2C1271&scope=...
...databaseList=1708%2C1271%2C1953&scope=...

**Search results: Find permalinks, email records, and create lists of resources**

**Permalinks**

Click the share icon and then click Permalink. You will be taken to a page with the record displayed. Copy and paste the URL as your permalink.
Email a record or list of records
Click the share icon and then click Email. The share icon is on the brief results, action panel, detailed record (mobile view), and list-view pages. Email is not an option on the MARC record.

In your Inbox
Each record contains the following information, if applicable: Title, author, format, publication date, peer-review indicator, source, OCLC number, database name, and “held by” information. If a list is emailed, records are in the order they came in from the database. They will not be in the order they were on the list.

Create a list from your search results
The “add to list” icon appears on the brief results, action panel, and on the detailed record (for mobile). Records can be added to a list from a single search or from multiple searches and from any page within a search.

The list is limited to 10 records. When the limit is reached, the system presents the user with a warning message, “Your list is full. Please remove records from your list or clear your list to add more records.” The user can close the message and continue to search. The user will be unable to add another record to the list until one or more records are removed from the list. Records can be removed one record at a time using the icon beside the record. All records on the list can be deleted using “Remove all.”

Your list
Records are in the order they are returned from the database search. The data for each record is in this order: Title, author, format, publication date, peer-review indicator, source, OCLC number, database name, and “held by” information.