Search preferences

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Discover how to set search preferences to enable, disable, and sort the data types, scopes, and indexes that appear when you perform basic and advanced searches in WorldShare Record Manager. Use search preferences to enable, disable, and sort the data types, scopes, and indexes that appear when you search for records. Search preferences also allow you to set a preference for the editor in which you wish to view records.

Note: After setting preferences in Searching - Advanced, Searching - Basic, or Working with Records:

- Click **Reset Form** to restore original default settings.
- Click **Discard Page Changes** to discard the changes you made and retain your previous settings. A confirmation dialog displays to confirm the discardment. Click **Discard** to confirm and discard your changes.

**Set search preferences for advanced searches**

**Searching - Advanced accordion - Image**

1. In the left navigation, click **User Preferences**.
2. From the User Preferences screen, click **Searching - Advanced**.
3. For One Search Result Only, enable **Open record for editing** to bypass the results list and go directly to the record editor when a search returns one result.
4. For Language(s) of Cataloging, select the **language(s)** used for the description of the item.
5. For Source of Cataloging, select the code used to designate the institution that is primarily responsible for the content of the catalog record.
   ◦ Any (default)
   ◦ DLC (Library of Congress)

6. For Search Scope(s) for Bibliographic Records:
   a. Select which search scopes appear in the Scope drop-down list. By default, all search scopes are selected.
      • To disable a search scope, deselect it in the Display column.
   b. Select the default search scope.
      • All WorldCat (default)
      • My Library Holdings
   c. Determine the order in which the search scopes appear in the Scope drop-down list.
      • Click the up arrow to move a search scope up and the down arrow to move a search scope down in the list.

7. For the first enabled search scope, click the search scope name and then select the following:
   a. For Default Sorting Method, select how your search results are sorted.

   **Available default sorting methods**
   ▪ Author (Ascending)
   ▪ Author (Descending)
   ▪ Date (Newest First)
   ▪ Date (Oldest First)
   ▪ Library Count (Highest First)
   ▪ Library Count (Lowest First)
   ▪ Relevance (default)
   ▪ Title (Ascending)
   ▪ Title (Descending)

   b. For Index Display Order:
      1. Select which indexes appear in the Index drop-down list. By default, all indexes are selected.
         • To disable an index, deselect it in the Display column.
      2. Select the default index by enabling the Default radio button for the index. By default, Keyword is selected.
      3. Determine the order in which the indexes appear in the Index drop-down list.
         • Click the up arrow to move an index up and the down arrow to move an index down in the list.
      4. Click Back to Search Scopes and repeat steps 1-3 for the remaining search scope(s).

8. Click Save.

**Set search preferences for basic searches**

1. In the left navigation, click User Preferences.
2. From the User Preferences screen, click **Searching - Basic**.

Note: After setting preferences in Data Type Options, Authority Records, Bibliographic Records, Local Bibliographic Data Records, and Local Holdings Records, click **Reset Form** to restore original default settings.

**Set data type preferences**

**Searching - Basic accordion: Data Type Options - Image**

1. Click **Data Type Options**.
2. Select which **data types** appear in the Data Type drop-down list. By default, all data types are selected.
   - To disable a data type, deselect it in the Display column.
3. Select the default data type by enabling the Default radio button for the data type. By default, Bibliographic Record is selected.
4. Determine the order in which the data types appear in the Data Type drop-down list.
   - Click the **up arrow** to move a data type up and the **down arrow** to move a data type down in the list.
5. Click **Save**.
Set authority record preferences

Searching - Basic accordion: Authority Records tab - Image

1. Click the Authority Records tab.
2. For One Search Result Only, enable Open record for editing to bypass the results list and go directly to the record editor when a search returns one result.
3. For Diacritics, enable Enter search terms with diacritics to enter diacritic characters when performing a basic or expert search.
4. For Authority References, enable Show See references in search results, Show See Also references in search results, and/or Show Heading Linking Entries in search results to view See references, See Also references, and/or 7xx links in authority record search result lists if present in the records.
5. For Search Scope(s) for Authority Records:
   a. Select which search scopes appear in the Scope drop-down list. By default, all search scopes are selected.
      • To disable a search scope, deselect it in the Display column.
   b. Select the default search scope by enabling the Default radio button for the search scope. By default, GND Authorities is selected.
   c. Determine the order in which the search scopes appear in the Scope drop-down list.
6. For the first enabled search scope, click the search scope name and then select the following:
   a. Select which indexes appear in the Index drop-down list. By default, all indexes are selected.
      - To disable an index, deselect it in the Display column.
      - See Record Manager Authorities Guide for a list of available authority files and indexes.
   b. Select the default index by enabling the Default radio button for the index. By default, the following indexes are selected:
      - GND Authorities: Keyword
      - GND Authorities - Browse: Corporate/Conference Name
      - LC: Agency Control Number
      - LC - Browse: Corporate/Conference Name Phrase
      - Maori Subject Headings: Cataloging Source
      - MeSH Authorities: Control Number
      - MeSH Authorities - Browse: Geographics Phrase
      - NTA Names: Control Number
      - NTA Names - Browse: Established Heading Linking Entry Phrase: Personal Name
   c. Determine the order in which the indexes appear in the Index drop-down list.
      - Click the up arrow to move an index up and the down arrow to move an index down in the list.
   d. Click Back to Search Scopes and repeat steps a-c for the remaining search scope(s).

7. Click Save.
Set bibliographic record preferences (default)
Searching - Basic

Data Type Options

Authority Records  Bibliographic Records  LBD Records  LHRs

Bibliographic Records Basic Search Preferences

Reset Form

One Search Result Only  Open record for editing
Default Search Results Format  Display condensed result list

Condensed Search Results Table Options

Specify whether you want each column to be displayed in the condensed search results table. You must display at least one column.

<table>
<thead>
<tr>
<th>Display</th>
<th>Column</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Title</td>
</tr>
<tr>
<td></td>
<td>Author</td>
</tr>
<tr>
<td></td>
<td>OCLC Number</td>
</tr>
<tr>
<td></td>
<td>Publisher</td>
</tr>
<tr>
<td></td>
<td>Publication Date</td>
</tr>
<tr>
<td></td>
<td>Format</td>
</tr>
<tr>
<td></td>
<td>Language of Work</td>
</tr>
<tr>
<td></td>
<td>Language of Cataloging</td>
</tr>
<tr>
<td></td>
<td>Cataloging Source</td>
</tr>
<tr>
<td></td>
<td>Authentication Code</td>
</tr>
<tr>
<td></td>
<td>Encoding Level</td>
</tr>
<tr>
<td></td>
<td>Held</td>
</tr>
<tr>
<td></td>
<td>WorldCat Holdings</td>
</tr>
<tr>
<td></td>
<td>Group Holdings</td>
</tr>
</tbody>
</table>

Search Scope(s) for Bibliographic Records

Specify whether you want each search scope to be displayed in the menu and what order you want them to be listed. You must display at least one search scope.

Click on the name of the search scope to customize the options.

<table>
<thead>
<tr>
<th>Display</th>
<th>Search Scope Name</th>
<th>Default Sorting Method</th>
<th>Default</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>All WorldCat</td>
<td>Relevance</td>
<td></td>
</tr>
<tr>
<td></td>
<td>All WorldCat - Browse</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>My Group Holdings</td>
<td>Author (Ascending)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>My Library Holdings</td>
<td>Author (Ascending)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Saved - In Progress</td>
<td>Save File Number</td>
<td></td>
</tr>
</tbody>
</table>
1. For One Search Result Only, enable **Open record for editing** to bypass the results list and go directly to the record editor when a search returns one result.

2. For Default Search Results Format, enable **Display condensed result list** to set the default search results format to condensed. By default, the search results format is enhanced.

3. For Condensed Search Results Table Options:
   a. Select which **columns** appear in the condensed search results list table. You must enable at least one column.
      - To remove a column, deselect it in the Display column.
      - **Available condensed search results table columns**
        - Title
        - Author
        - OCLC Number
        - Publisher
        - Publication Date
        - Format
        - Language of Work
        - Language of Cataloging
        - Cataloging Source
        - Authentication Code
        - Encoding Level
        - Held
        - WorldCat Holdings
        - Group Holdings
   b. Determine the order in which the columns appear in the condensed search results list table.
      - Click the **up arrow** to move a column up and the **down arrow** to move a column down in the list.

4. For Search Scope(s) for Bibliographic Records:
   a. Select which **search scopes** appear in the Scope drop-down list. By default, all search scopes are selected.
      - To disable a search scope, deselect it in the Display column.
   b. Select the **default search scope** by enabling the Default radio button for the search scope. By default, All WorldCat is selected.
   c. Determine the order in which the search scopes appear in the Scope drop-down list.
      - Click the **up arrow** to move a search scope up and the **down arrow** to move a search scope down in the list.

5. For the first enabled search scope, click the **search scope name** and then select the following:
   a. For Default Sorting Method, select how your search results are sorted (not applicable for All WorldCat - Browse).

   **All WorldCat default sorting methods**
   - Author (Ascending)
• Author (Descending)
• Date (Newest First)
• Date (Oldest First)
• Library Count (Highest First)
• Library Count (Lowest First)
• Relevance (default)
• Title (Ascending)
• Title (Descending)

My Library Holdings default sorting methods

• Author (Ascending)
• Author (Descending)
• Date (Newest First)
• Date (Oldest First)
• Library Count (Highest First)
• Library Count (Lowest First)
• Relevance (default)
• Title (Ascending)
• Title (Descending)

Saved - In Progress default sorting methods

• Save File Number (default)
• Title
• Descending Date
• Ascending Date

b. For Index Display Order:

1. Select which indexes appear in the Index drop-down list. By default, all indexes are selected.
   • To disable an index, deselect it in the Display column.
   • See Bibliographic record indexes for a list of available bibliographic indexes.

2. Select the default index by enabling the Default radio button for the index. By default, the following indexes are selected:
   • All WorldCat: Author
   • All WorldCat - Browse: Corp./Conf. - Whole Phrase
   • My Library Holdings: Keyword
   • Saved - In Progress: My Status

3. Determine the order in which the indexes appear in the Index drop-down list.
   • Click the up arrow to move an index up and the down arrow to move an index down in the list.

4. Click Back to Search Scopes and repeat steps 1-3 for the remaining search scope(s).

6. Click Save.
Set local bibliographic data record preferences

Searching - Basic accordion: Local Bibliographic Data Records tab - Image

1. Click the **Local Bibliographic Data Records** tab.
2. For One Search Result Only, enable **Open record for editing** to bypass the results list and go directly to the record editor when a search returns one result.
3. For Search Scope(s) for Local Bibliographic Data Records:
   a. Click **My LBDs** and then:
      - Select which **indexes** appear in the Index drop-down list. By default, all indexes are selected.
      - To disable an index, deselect it in the Display column.
      - See [Local bibliographic data record indexes A-Z](https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Search/Search_preferences) for a list of available LBD indexes.
      - Select the default index by enabling the Default radio button for the index. By default, Keyword is selected.
      - Determine the order in which the indexes appear in the Index drop-down list.
        - Click the **up arrow** to move a data type up and the **down arrow** to move a data type down in the list.
4. Click **Save**.
Set local holdings record preferences

Searching - Basic accordion: Local Holdings Records tab - Image

1. Click the Local Holdings Records tab.
2. For One Search Result Only, enable Open record for editing to bypass the results list and go directly to the record editor when a search returns one result.
3. For Display Information in Search Results, enable or disable the display of Shared Print and/or Lending Policy columns in the LHR result list. By default, Shared Print and Lending Policy columns do not display. Enable if your library participates in either the Shared Print program or Interlibrary Loan.
4. For Copy Number, enable Display 852 $t information in search results to display 852 $t (Copy Number) in your search results.
   - If you enable this preference, enter a prefix for this information in the Prefix form field (e.g., c., copy, copy number, etc.).
5. For Search Scope(s) for Local Holdings Records:
   a. Select which search scopes appear in the Scope drop-down list. By default, all search scopes are selected.
      - To disable a search scope, deselect it in the Display column.
   b. Select the default search scope.
      - My LHRs (default)
      - My LHRs - Browse
   c. Determine the order in which the search scopes appear in the Scope drop-down list.
      - Click the up arrow to move a search scope up and the down arrow to move a search scope down in...
6. Click **My LHRs**. For Index Display Order:
   a. Select which **indexes** appear in the Index drop-down list. By default, all indexes are selected.
      - To disable an index, deselect it in the Display column.
      - See [Local holdings record indexes A-Z](https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Search/Search_preferences) for a list of available LHR indexes.
   b. Select the default index by enabling the Default radio button for the index. By default, the Action Note index is selected.
   c. Determine the order in which the indexes appear in the Index drop-down list.
      - Click the **up arrow** to move an index up and the **down arrow** to move an index down in the list.

7. Click **Save**.

**Set bibliographic record editor preference**

1. In the left navigation, click **User Preferences**.
2. From the User Preferences screen, click **Working with Records**.
3. Select a default editor.
   - **MARC 21 View** (default)
   - **Text View**
4. Click **Save**.