Search Settings

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Learn how to customize the search defaults and search results display for WorldCat Discovery. To access this screen, sign in Service Configuration, open the WorldCat Discovery and WorldCat Local left navigation, select Search Settings.

Customize the search defaults and search results display for WorldCat Discovery.

Search Defaults

Customize the search defaults for WorldCat Discovery.

Display indication of search relevance on results and item details

When this setting is toggled to display, search relevance indicators highlight matching search terms in the result entries and on the item details screen. If you add an index label to your search terms, the relevant subject entries will also display in the result set. See Search result record display for more information.

Allow French boolean operators in WorldCat Discovery

It is possible to allow Discovery users to search using boolean operators in French. To allow French boolean operators in WorldCat Discover searches, use the toggle switch to Allow French boolean operators in WorldCat Discovery.

The following French boolean operators can be used:

- ET = AND
- OU = OR
- SAUF = NOT

Note: These operators must be entered in all uppercase letters to be considered boolean operators.

Default Grouping

Determine how search results are grouped by default. The user will be able to change these settings after the initial display of the search results.

If the following settings are enabled, search results are grouped by work by default depending on the scope level in WorldCat Discovery:

- Group related editions for search results scoped to [Your Level 1, Level 2, and 3 group] by default
  - See Relevancy and Scoping for more information.
- Group related editions for search results scoped to libraries worldwide by default
Edition grouping brings records together that have the same:

- WorkID (title, author, format)
- Language of publication
- Sub-format (if applicable)
- Year of publication
- Publisher (first entry)

If disabled, search results are grouped by variant record by default. This will group records under a representative record for the same edition that may be in a different language of cataloging or a duplicate record that has not yet been merged.

Define how library users are allowed to control grouping of variant records in search results and Explore Editions and Formats. Displaying the controls allows library users to group and ungroup variant records. If controls are not displayed, variant records will be grouped by default.

- Enable Display control to group variant records in search results and Editions and Formats to allow for the display of the option to group or ungroup variant records. Users will see a Hide duplicates filter in WorldCat Discovery that will allow them to navigate to the flat view in WorldCat Discovery search results where all records are ungrouped from an edition cluster.
  - Variant records are records that are for the same edition, but in a different language of cataloging or a duplicate record that has not yet been merged.
  - If disabled, the Hide duplicates filter will not display to users in WorldCat Discovery search results. When Hide duplicates does not display, the search results will be grouped by variant record when Group editions and formats is disabled in the WorldCat Discovery interface.
- If you have chosen to display the Hide duplicates filter, you can select to Group variant records by default. The Hide duplicates filter will be enabled by default on user’s search results. To see a flat view, users must disable the Hide duplicates filter on search results to ungroup from the search results page.

Note: Carefully consider the benefits of displaying the Hide duplicates filter and allowing users to ungroup variant records. Presenting an ungrouped list to patrons may present more options than desired. OCLC research and testing suggests that clustering editions and formats adds efficiency to searching for most users.

See Filter and refine search results for more information.

Define the default display of item availability for grouped records. To enable availability from the edition group, select one of the options below:

- Display availability from the edition group: Availability information will display for each record in the edition cluster on the representative record.
- Display availability from the OCLC number: Availability information will be displayed for the OCLC number of the representative record.

See Representative record and availability display on grouped search results for more information.
Default Sort

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 list.

Note: The WorldCat Local default sort is no longer supported by WorldCat Discovery.

<table>
<thead>
<tr>
<th>SORT OPTION</th>
<th>BEHAVIOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Best Match</td>
<td>Blends Title, Author, Date and Worldwide Holdings with an emphasis placed on Title.</td>
</tr>
<tr>
<td>Recency</td>
<td>Blends Date, Title, Author and Worldwide Holdings with an emphasis placed on Date.</td>
</tr>
<tr>
<td>Author (A to Z)</td>
<td>Sorts by special characters or numbers in the first name, then A to Z by last name.</td>
</tr>
<tr>
<td>Date (Newest)</td>
<td>Sorts chronologically by publication date with newest items listed first.</td>
</tr>
<tr>
<td>Date (Oldest)</td>
<td>Sorts chronologically by publication date with oldest items listed first.</td>
</tr>
<tr>
<td>Library</td>
<td>Considers individual holdings first, then blends Title, Author, Date and Worldwide Holdings.</td>
</tr>
<tr>
<td>Most Widely Held</td>
<td>Presents an &quot;unclustered&quot; view of search results with an emphasis on Worldwide Holdings in a blend of Date, Title, and Author. Use this sort option to view best results for interlibrary loan requests.</td>
</tr>
<tr>
<td>Title</td>
<td>Sorts by special characters, then alphabetically by Title. Only the article &quot;the&quot; is ignored.</td>
</tr>
</tbody>
</table>

Search Expansion Settings

Enable expanded search queries using related terms.

Related terms

Allow searching across authority files to find relevant search terms, even when using related, variant, or deprecated
search terms.

1. Enable the **Expand user's queries using authority data i.e. related terms** setting to show the **Expand search with related terms** option in the WorldCat Discovery interface.

2. Enable **Expand query using authority data by default** to turn this feature on automatically in the WorldCat Discovery interface.

3. Select Authority files:
   - AAT Art & Architecture Thesaurus
   - LCGenre Library of Congress Genres
   - LCNAF Library of Congress Name Authority File
   - LCSH Library of Congress Subject Headings
   - MeSH Medical Subject Headings
   - RVM Répertoire de vedettes-matière
     - RVM uses controlled terms from the French languages
   - RVMGF Répertoire de vedettes-matière Genre Form
     - RVMGF uses controlled terms from the French languages

See [Expand search with related terms](https://help.oclc.org/Librarian_Toolbox/OCLC_Service_Configuration/WorldCat_Discovery_and_WorldCat_Local/0…) for more information.

### Translated Terms

Determine whether to expand search queries using translated terms. Additional terms appear if the search term matches on the 7xx field for parallel terms.

1. Select **Allow users to translate their query into a different, single language** to surface this option in the WorldCat Discovery interface.

2. Enable **Expand query to translated terms by default** to turn this feature on automatically in the WorldCat Discovery interface.

3. Select the sources for translation:
   - AAT Art & Architecture Thesaurus
   - Canadiana Name Authorities
   - Canadiana Subject Headings
   - LCDGT Library of Congress Demographic Group Terms
   - LCGenre Library of Congress Genres
   - LCMPT Library of Congress Medium of Performance Thesaurus
   - LCNAF Library of Congress Name Authority File
   - LCSH Library of Congress Subject Headings
   - MeSH Medical Subject Headings
   - RVM Répertoire de vedettes-matière
   - RVMGD Répertoire de vedettes-matière des groupes démographiques
   - RVMGF Répertoire de vedettes-matière Genre Form
RVMMEM Répertoire de vedettes-matière des moyens d'exécution en musique

4. Select the default translation language. Options include:
   - English to French
   - French to English

Search Filters Settings

The Search filter settings section is used to select which filters appear in your search results and how the selected filters appear. Each available filter can be configured to display in a specific way. Use the options in the columns to determine how each filter appears.

Notes:

- **Search Filters Settings** are available to WMS institutions, WorldCat Discovery premium institutions, and group catalogs. For more information, please contact sales@oclc.org.
- Filters will display only when the selected database(s) have metadata available to support them, not all databases support all filters.

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order</td>
<td>Use the up and down arrow buttons to arrange the display order of the filters.</td>
</tr>
<tr>
<td>Filter Type</td>
<td>The following filters can be configured:</td>
</tr>
<tr>
<td></td>
<td>• Library</td>
</tr>
<tr>
<td></td>
<td>• Format</td>
</tr>
<tr>
<td></td>
<td>• Content (Includes options such as Full Text, Peer Reviewed, and Open Access)</td>
</tr>
<tr>
<td></td>
<td>• Year</td>
</tr>
<tr>
<td></td>
<td>• Author</td>
</tr>
<tr>
<td></td>
<td>• Topic (Includes subjects such as Engineering &amp; Technology)</td>
</tr>
<tr>
<td></td>
<td>• Database</td>
</tr>
<tr>
<td></td>
<td>• Language</td>
</tr>
<tr>
<td></td>
<td>• Audience</td>
</tr>
<tr>
<td>Hide or Show</td>
<td>Toggle the button to show or hide the filter in search results.</td>
</tr>
<tr>
<td>Expand or Collapse</td>
<td>Toggle the button to expand or collapse the content of each filter by default.</td>
</tr>
<tr>
<td>COLUMN</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------------------------------------------------</td>
</tr>
<tr>
<td>Display Label</td>
<td>Select a Display Label from the drop-down list.</td>
</tr>
<tr>
<td>COLUMN</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td></td>
<td>Display label selections</td>
</tr>
<tr>
<td>COLUMN</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------</td>
</tr>
<tr>
<td>FILTER TYPE</td>
<td>DISPLAY LABEL SELECTIONS</td>
</tr>
</tbody>
</table>
| Library      | • At My Library  
               • Held By  
               • Held By Library  
               • Held by My Library  
               • Library  
               • Library Location  
               • My Campus  
               • My Institution's Library  
               • My Library  
               • Owned By Library  
               • Search in These Libraries  
               • Where |
| Format       | • Filter by Format  
               • Format  
               • Item Format  
               • Looking for a  
               • Material Format  
               • Material Type  
               • Resource Format  
               • Resource Type  
               • Source Type  
               • Type of Resource |
| Content      | • Category  
               • Content  
               • Content Type  
               • Limit To |
<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Only</td>
<td>• Show Only</td>
</tr>
</tbody>
</table>
| Year | • Creation Date  
| | • Date  
| | • Publication Date  
| | • Publication Year  
| | • Year  
| | • Year of Publication  
| | • Years |
| Author | • Author  
| | • Author/Creator  
| | • Creator  
| | • Person |
| Topic | • Academic Discipline  
| | • Areas  
| | • Conspectus  
| | • Filter by Subject  
| | • Subject  
| | • Subject Area  
| | • Subject Headings  
| | • Subject Terms  
| | • Topic  
| | • Within Subject |
| Database | • Collection  
| | • Collection Source  
| | • Database  
| | • Databases  
| | • Record Source |
Click **Save** to save changes.

### Search Results Settings

**Promote a single location**

*Note: This functionality is for WorldCat Discovery only.*

Determine whether to promote a single location or display an availability summary on search results, Local Editions and Formats, Shelf Browse, and on the Access Options panel.

This setting will be enabled by default.

- When the setting is enabled, the interface displays the first available item.
- When this setting is disabled, users will always see the availability summary when items exist at more than one location held by their local institution.
If there is only one location present for the record, the interface will display that location’s first available item rather than a summary in order to show the item is only available at that single location.

Display Editions & Formats links on search results

Note: This functionality is for WorldCat Discovery only.

Determine whether or not to allow the Worldwide Editions and Formats link to appear on search results in WorldCat Discovery.

Example

Clicking on the Worldwide Editions and Formats link from the search results will open the Explore Editions and Formats section of the item record. For information on filtering Editions and Formats, please see Selected Filters.

Display alternate formats on search results

Note: This functionality is for WorldCat Discovery only.

To help users access all locally held formats from a default edition, libraries can configure other locally-held formats to display on search results. When viewing search results, WorldCat Discovery displays one link for each unique format locally held by your institution.

For more information, see Display locally held formats on search results.

Define the default availability display for Discovery

Caution: For Discovery Premium Institutions, non-WMS institutions only.

If your library subscribes to WorldCat Discovery Premium (not WMS), choose to turn off the display of item availability
information from your OPAC in search results if this does not meet your needs. Instead, you may activate links from WorldCat Discovery to your OPAC interface via deep links, where users can view item location and availability information.

Choose to:

- Display availability details
- Display local OPAC deep link
  - Refer to Configure links to your online catalog for more information.

Alternative Subject Headings

Upload the local re-mapping spreadsheet (.tsv) to surface alternate subject headings in lieu of any previous, sensitive subject headings in your library's WorldCat Discovery interface. Refer to EDI, Local subject re-mapping for more information.

To upload the spreadsheet:

1. After creating a spreadsheet to define local re-mapping for subject headings using a universal template provided by WorldCat Discovery, save the file as a tab-separated values file (.tsv).
2. Toggle on the Display alternative subject headings in search results and item details setting.
3. Select the Browse button to find and select your tab-separated values file for upload.
4. Determine whether to configure a custom message for the library users. Users will see this language if they click on a subject that has been re-mapped, warning them that the original, sensitive subject will be displayed when the search is run.

Note: Once uploaded, the Local subject re-mapping file cannot be downloaded from the OCLC Service Configuration. Retain a local copy for future use.