Filter and refine search results

Learn how to refine and filter search results in the WorldCat Discovery interface.

Search relevance indicators

Search relevance indicators highlight matching search terms in the result entries. If you add an index label to your search terms, the relevant subject entries will also display in the result set.

Retain or clear filters

Determine whether to retain the specified filters for subsequent searches by selecting Retain Filters. This option displays when filters have been selected to narrow your search on brief results, or when the setting is enabled by default in the service configuration.
• The default setting for this option is based on a setting selected by your library. To configure this setting, see Search Settings.

• If this setting is not enabled, search filters will be cleared when a new search is performed. This feature will be disabled by default.

Select Clear Filters to remove the filters currently applied to the search results.

Filter search results

You can narrow the set of results that were returned from your initial search by using the filters available in the left column of the results screen. Simply check the boxes beside the filter(s) you desire.

Filters can be used multiple times throughout a search session. Your filters can be reapplied to preserve your search context without manually having to select them for each additional search in a single session.

Note: Available filters and formats will vary depending on the selected database(s). The Audience filter will display only when Worldcat.org or WorldCat is selected as the only database in a search.

To select which filters are available, configure display order, and select custom labels, see Search Filter Settings.

Refine the search results

From the search results screen, the following options are available for sorting and filtering.

<table>
<thead>
<tr>
<th>SECTION</th>
<th>FILTERS ALLOW YOU TO:</th>
<th>NOTES:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sort by:</td>
<td>Change the sort order of the results</td>
<td>Select your Sorted by filter from the drop down menu located in the upper right corner of the screen.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Could include: Best Match, Recency, Library, Author (A-Z), Date (Newest First), Date (Oldest First), Most Widely Held, Title (A-Z)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For more information on sort options, please see WorldCat Discovery Default Sort on Search Results.</td>
</tr>
<tr>
<td>Group related editions</td>
<td>Check this box to group related editions in search results</td>
<td>If enabled, records in search results are grouped by work. To set Group related editions to be</td>
</tr>
</tbody>
</table>
enabled by default based on the selected library scope, see Search Settings.

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 edition and will choose one representative record for records for the same edition, but in a different language of cataloging or duplicate records that have yet to be merged.

Users can override the default at any time and your preference will remain selected throughout your search session. This default setting can also be modified from the library search box.

Variant records are records for the same edition, but in a different language of cataloging or a duplicate record that has not yet been merged.

This setting must be enabled in Service Configuration to display in the WorldCat Discovery interface. See Search Settings for more information.

Disabling the Group variant records filter will show a flat view or ungrouped view of the edition cluster. The flat view shows all records in the search results and
does not group by work, edition, duplicate, or language of cataloging.

Note: Carefully consider the benefits of displaying the **Group variant records** 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.

If the search term matches on the 1xx and 4xx fields of an authority record, the authorized terms and any related terms will be added to the original search term(s).

- Terms are added from any authority source that your library has configured, regardless of the language determined for the authority source, the user interface or the user's query.

An information bar will appear at the top of the search results screen indicating that expanded terms were used for the search.

Select the original search terms to search again without using the expanded terms.

Select the **include related terms** link to see which related terms were used.

A user-initiated keyword search will return results from the keyword index.
to ensure matching phrases from uncontrolled vocabularies appear as well.

Search expansions will search as keywords over the appropriate indexes.

To configure this setting to appear or be selected by default, see Search Expansion Settings, Related Terms.

To change the display label, see Search Filter Settings. The following labels are available:

- At My Library
- Held By
- Held By Library
- Held by My Library
- Library
- Library Location
- My Campus
- My Institution's Library
- My Library
- Search in These Libraries
- Where

The "Content" section includes options such as Full Text,
Peer Reviewed and Open access

- The Full Text filter identifies:
  - Records present in the institution's knowledge base, using the `kb` index to search the institution's registry ID, and match the record results based on:
    1. ISSN
    2. Coverage start date
    3. Coverage end date
    4. Content
  - eBook records held by the institution using the `wz` and `sz` indexes.
    - `wz`: The index searches an internal OCLC institution number used by OCLC's internal APIs to identify if the institution owns an item. Used in place of an institution's OCLC symbol.
    - `sz`: The index searches an internal OCLC branch number used by OCLC's internal APIs to identify the holding branch of the item.

- To change the display label, see Search Filter Settings. The following labels are available:
  - Category
  - Content
  - Content Type
  - Limit To
  - Show Only

- Open content in WorldCat Discovery search results

- To change the display label, see Search Filter Settings. The following labels are available:
  - Filter by Format
  - Format
  - Looking for a
    - Material Format
    - Material Type
    - Resource Format
    - Resource Type

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<table>
<thead>
<tr>
<th>Format</th>
<th>Limit to a particular format</th>
</tr>
</thead>
</table>

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https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery/Search_in_WorldCat_Discovery/020Filter_se…

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<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Available Labels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Database</td>
<td>Limit to results from a single database</td>
<td>Collection, Collection Source, Database, Databases, Record Source, Resource, Search In, Source, Source Database, Source Type</td>
</tr>
<tr>
<td>Author</td>
<td>Select works by one or more authors</td>
<td>Author, Author/Creator, Creator, Person</td>
</tr>
<tr>
<td>Year</td>
<td>Narrow the results to the last 5 years, choose a custom year range, or search a single year</td>
<td>Creation Date, Date, Publication Date</td>
</tr>
</tbody>
</table>

To change the display label, see [Search Filter Settings](https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery/Search_in_WorldCat_Discovery/020Filter_settings). The following labels are available:
<table>
<thead>
<tr>
<th>Filter Type</th>
<th>Description</th>
<th>Available Labels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Language</td>
<td>Filter for results in a particular language</td>
<td>Dialect, Filter by Language, Language, Language/Dialect</td>
</tr>
<tr>
<td>Topic</td>
<td>Includes subjects, such as Engineering &amp; Technology.</td>
<td>Academic Discipline, Areas, Conspectus, Filter by Subject, Subject, Subject Area, Subject Terms, Topic, Within Subject</td>
</tr>
<tr>
<td>Audience</td>
<td>Filter Juvenile and Not Juvenile audiences.</td>
<td>Audience, Reading Level</td>
</tr>
</tbody>
</table>

**Watch a video**
Filter search results in WorldCat Discovery (7:48)

This video demonstrates how to apply filters to search results in WorldCat Discovery.

Explore Editions & Formats filter and sort

Filters and filter labels are configured in Search Filter Settings. Default filter options display:

- On detailed record pages, users can apply the following filters to the editions and formats list:
  - Held By Library
  - Format
  - Publication Year
  - Language

- On detailed record pages, users can apply the following sorts to the editions and formats list:
  - Library
  - Date (Newest First)
  - Date (Oldest First)

- Editions and Formats information contains the following columns:
  - Edition
  - Format
  - Year
  - Language
  - Library

Transition from basic to advanced search

To refine a basic search using advanced search features, click on the Advanced Search link below the basic search box. The search terms entered in the basic search box carry over to the Search Term field on the Advanced Search screen. Additional search parameters can be added to the query on the Advanced Search screen.

Locate available copies

When one or more copy of an item is available, all location information will display in the search results. Configure Item Availability on Search Results in Service Configuration.

When results are configured to show Automatically:
1. Select the **Get Available Copies** button to expand a list of available copies and view location information.
2. Select a location to expand the details and view the item call number.

When results are configured to show **On Demand**:

1. Select the **Check Availability** button to check for and retrieve available copies.
2. Select the **Get Available Copies** button to expand a list of available copies and view location information.
3. Select a location to expand the details and view the item call number.

If there are no item records or no available items, click **View Details** to see the detailed record and fulfillment options.