Learn how to set preferences for basic and advanced searches in the simplified cataloging role in Record Manager.

Overview

The User Preferences menu allows you to select accordions that enable you to set your preferences for advanced and basic searching.

Note: After setting preferences for searching:

- 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.

Searching - Advanced

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:
Searching - Basic

1. In the left navigation, click User Preferences.
2. From the User Preferences screen, click Searching - Basic.
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 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.
5. 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
• Holding Audience Level
  Note: Holding Audience Level is available for WorldShare Management Services libraries only.

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.

6. For Search Scope(s) for Bibliographic Records:
   a. Select which **search scopes** appear in the Scope drop-down list.
      • 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.

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 (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)

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
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.