OCLC Connexion Client Guides

Cataloging:

Search WorldCat

Last updated: May 2021

Revision History

Date	Section title	Description of changes
January 2008	5 Use WC search results	Added CatL column and data to descriptions of data shown in WorldCat truncated and brief lists. CatL = language of cataloging
	9 Retrieve local system records using a Z39.50 connection	You can now define the use attribute by which to retrieve records (formerly, only local record number was defined) and also define structure, truncation, and relation attributes.
August 2011	4 Qualify and combine searches	Added instructions for qualifying a search by language of cataloging.
	5 Use WC search results	Clarified how printing works, depending on whether you use the toolbar button, the keystroke shortcut <Ctrl><P>, the File > Print command, or the hot keys <Alt><F><P>.
March 2012	3 Customize WC search and browse	Instructions for using the option to view WorldCat searches in GLIMIR clusters
	5 Use WC search results	• Describe how GLIMIR data displays in WorldCat search results • Can use View > List Type to toggle between GLIMIR brief and truncated lists
	6 Browse WC	• Describes browse WorldCat results with the GLIMIR option selected • With the GLIMIR option on, selecting from a browse results list results in a GLIMIR list
June 2012	7 Enter WC batch search keys	Two examples were updated from "\bks\" to "/bks/".
August 2013	1 Search WC interactively 7 Enter WC batch search keys	Added text that states that the application supports Armenian, Ethiopic, and Syriac scripts.
	10 OCLC Connexion cataloging basics	
July 2016	1 Search WC interactively 3 Customize WC search and browse 4 Qualify and combine searches	Removed references to institution records
May 2021	1 Search WC interactively	Added note pointing to Connexion client version 3.0 documentation.

Contents

1. Search WorldCat interactively

Note: If you are using Connexion client 3.0 or newer, see Connexion client for applicable documentation.

See also:

- **Client Quick Reference:** OCLC Connexion Client Quick Reference.
- **Searching WorldCat Quick Reference:** Connexion: Searching WorldCat Quick Reference.
- **Complete, detailed index descriptions:** Searching WorldCat Indexes.

Non-Latin scripts

The Connexion client supports using these non-Latin scripts for constructing WorldCat search terms: Arabic, Armenian, Bengali, Chinese, Cyrillic, Devanagari, Ethiopic, Greek, Hebrew, Japanese, Korean, Syriac, Tamil, and Thai.

Follow procedures in topics on searching WorldCat. See guidelines below for using non-Latin script search terms.

Enter a command line WorldCat search

To type a complete search in a single string using full search syntax–all parts of a search in correct order and format, including index labels and punctuation, search terms, Boolean operators, and qualifiers–use the command line in the:

- Search Worldcat window
- WorldCat quick search tool on the toolbar
- See procedures immediately below.

To open the Search WorldCat window:

	Action
1	Log on to the system. Or On the Cataloging menu, click **Search > WorldCat**, or click 🖼️, or press <F2>, and let the client prompt you to log on before opening the search window.
2	In the **Command Line Search** area of the Search WorldCat window, type a keyword, numeric, or derived search, or a browse term, using full search syntax. Or Click the Command Line Search list and select a previous search (the list displays up to 10 of your last searches). See "Command Line Search guidelines" below for details. See more details and examples for specific types of searches in "Keyword, numeric, and derived search syntax and examples." See also "Browse WorldCat." **Notes:** • Keyword/numeric and browse indexes include separate indexes/labels for words, phrases, and whole phrases. • For a description of all WorldCat indexes, with labels, fields/subfields indexed,and examples, see Searching WorldCat Indexes.
3	**Optional.** Select a search results display. See "Customize WorldCat search and browse interfaces" for details. **Note:** The Display Search Results setting applies to command line and guided search results, and to results displayed when you open an entry on a Browse WorldCat List that contains more than one record.
4	Click **OK** or press <Enter> to send the search. See "Use WorldCat search results." See also "Enter WorldCat searches for batch processing."

Tip: If you use command line searching most of the time, click **Collapse/Expand** in the Search WorldCat window to show only the Command Line Search view of the window. Click again to restore the full view of the window. See "Customize WorldCat searching and browsing."

Note: Search indexes and some browse indexes are available for SCIPIO records (Sales Catalog Index Project Input Online). The word *SCIPIO* precedes each index name in the alphabetized list for ease of finding them. The index lists include labels you can use for command line searching. For example, precede a command line search in the SCIPIO - Individual Auctioneer's Name Phrase index with the label **ia=**.

Alternative: Use the WorldCat quick search tool

By default, the client displays a quick tool on the toolbar for searching or browsing

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To use the quick tool:

	Action
1	**Optional.** Log on to the system.
2	Click to place the cursor inside the quick search box and type a command line search or browse. Or Click the arrow directly to the right of the box to select from a search history list. **Note:** The client keeps a list of all searches (not limited to the last 10), but does not retain them after you close the program.
3	Click the search icon, 🔍, or press <Enter> to send the search. **Note:** If you did not log on before sending the search, the client prompts you to log on.
4	**Optional.** To clear the search history list, click the arrow directly to the right of the search icon, and then click **ClearWorldCat Search History**. **Result:** The client retains only the most recent search you typed in the quick search box. When you close and re-open the client, all searches are cleared from the quick search box.

To hide or re-display the WorldCat quick search tool:

Action
Click **View > Toolbars > Quick Tools**. A checkmark indicates that the quick tools are displayed.

Command line search guidelines

Type the search in a single string with correct search syntax: search terms, index labels and punctuation, Boolean operators, and qualifiers, in correct order.

- Include a command–Scan (**sca**)–only for a browse term. See also "Browse WorldCat."
- Enter search terms using upper- or lowercase or both.
- Keyword, numeric, and browse indexes are searchable by word, phrase, or whole phrase.
- **Required.** (See three exceptions below.) Include index labels when you search for a number, word, or phrase, and in a browse query (index scan).
- **Required.** Follow index labels with punctuation (no spaces before or after). Use a colon (**:**) for words or an equal sign (**=**) for phrases and whole phrases (whole phrase indexes have three letters; the third is always **w**).

  Note: To find the exact sequence of multiple words:
  - Using a **word** search: Enclose multiple words in quotation marks (**"**). If you do not, the system searches for each individual word anywhere in the record.
  - Using a **phrase** search or browse: Use an equal sign, not a colon. A colon indicates a word search
  - **Examples:** Type:
    ti:"gone with the wind"
    (**ti:gone with the wind** retrieves records that contain any instance of *gone* or *wind*; *with* and *the* are stopwords (not indexed)

sca ti=gone with the wind
(**sca ti:gone with the wind** only searches or browses for the word *gone*)

- **Exceptions in the required use of index labels:**
  - o Index labels and punctuation are optional in the command line for a derived search if it is the first or only search; otherwise the index label is required.

    Examples:
    dea,in,ve, and la:french
    la:french and td:dea,in,ve,
  - o Index labels and punctuation are optional for an ISBN search if it is the first or only search in the command line.
  - o You can precede an OCLC Control Number search with the index label (**no:**), an asterisk (*****), or the number sign (**#**).

    Caution: Connexion recognizes only an ISBN or a derived search without an index label. Otherwise, if you omit the index label, the system searches the Keyword (**kw:**) index, a general word index.

- **Optional–combine searches.** Type Boolean operators **and**, **or**, **not** to combine multiple search terms for different indexes.
- **Optional–use proximity operators.** In a word search, type proximity operators with (**w**) or near (**n**) with numbers (1 to 25) to find multiple terms in one index that have a specified number of intervening words, or enclose words in quotation marks to search for an exact sequence of words.
  Examples:
- **ti:natural w1 foods** or **ti:"natural foods"**
- **Optional–qualify searches.** Type qualifiers to focus a search. Begin each qualifier with a slash or with an index label followed by a colon (**:**).

  Use **slashes or index labels** and colons with the following four types of qualifiers: format, years, microform, or source (**/dlc**).

  Use **index labels only** (no slash) to qualify a search by Internet/non-Internet, by language, or by material type.
  Example:
  la:english and ti:thesaurus/bks/1960-5/dlc
  la:english and mt:dvv and ti:wizard/1970-
- Include only one slash qualifier of any single type.
- Slash qualifiers must be the last element of a search.
- **Optional–use wildcards, truncation, or plurals.** In keyword searches, type symbols for wildcards (# or ?), truncation (*), or plurals(+) in place of characters or endings to retrieve different forms of a word. (See detailsbelow.)
  Notes:
  - o Wildcard, truncation, and plural ending symbols must be preceded by at least three characters.
  - o These symbols are not supported for non-Latin script search terms.
- Many indexes are available for searching and browsing WorldCat. See Searching WorldCat Indexes.

Use the Keyword/Numeric Search area for guided searches

To enter a guided search that does not require that you remember full search syntax (index labels, etc.), enter search terms in text boxes and select indexes, Boolean operators, and qualifiers from lists. The client supplies correct syntax automatically when you send the search.

	Action
1	Log on to the system. Or On the Cataloging menu, click **Search > WorldCat**, or click , or press <F2>, and let the client prompt you to log on before opening the search window.
2	In the Search WorldCat window, under Keyword/Numeric Search, type a keyword, numeric, or derived search in the **Search for** box(es). Or Click a Search for list and select a previous search (the list displays up to 10 of your last searches). **Note:** Use any **Search for** box(es) in any order. See "Keyword/Numeric Search guidelines below for details. See more details and examples for specific types of searches in "Keyword, numeric, and derived search syntax and examples" and in "Browse WorldCat.". **Tip:** • To search a single index, combine search terms in a single **Search for** box. Type terms in any order. Using **and** to combine them is optional. The system "**and**s" the terms (finds records that contain all of the terms) unless you combine terms with **or** (to find records containing any of the terms) or **not** (to find records that exclude terms). • To search more than one index, enter search terms in separate **Search for** boxes, select Boolean operator(s) to combine the terms, and select a different index for each box.
3	To the right of the **Search for** box, select an index from the default short list of the 10 most used indexes, or customize the short index list, or switch to the full list of over 90 available indexes (the list displays the label and correct punctuation for each index). See "Customize WorldCat search and browse interfaces" for details. For a description of all WorldCat indexes, with labels, fields/subfields indexed, and examples, see Searching WorldCat Indexes. **Note:** Search indexes and some browse indexes are available for SCIPIO records (Sales Catalog Index Project Input Online). The word *SCIPIO* precedes each index name in the alphabetized list for ease of finding them.

	Action
4	**Optional–combine searches.** To combine multiple searches, type more search terms in the remaining **Search for** boxes.

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	Combine multiple searches by selecting a Boolean operator from the list to the left of the **Search for** box. Boolean operators specify relationship(s) among the search terms. • **and** finds records that contain both search terms in the same record • **or** finds records that contain either term • **not** finds records that contain the first term but not the second term See "Qualify and combine searches" for more information.
5	**Optional–qualify searches.** Specify qualifier(s): • Select **Format**, **Internet**, **Source**, or **Microform** qualifiers from lists. • Select a **Language** qualifier from the default short list of the nine most used languages, or customize the short list, or expand the list to select from the hundreds of languages valid for MARC records. • Select Material Type qualifiers from the default short list of the ten most used, or customize the short list, or expand the list to select from over 100 material types indexed in WorldCat. • To qualify by **Year**, type a year or year range in the box. See "Qualify and combine searches" for details.
6	**Optional.** Select the way you want search results to display. See "Customize WorldCat search and browse interfaces" for more information. **Note:** The Display Search Results setting applies to command line and guided search results and to results displayed when you open an entry on a Browse WorldCat List that contains more than one record.
7	Click **OK** or press <Enter>. See "Use WorldCat search results."

Guided search guidelines

- Type a search term (word, phrase, whole phrase, number, or derived) in any of three **Search for** boxes. (Note that you can search indexes for words, phrases, or whole phrases.)
- To search one index using multiple terms, enter the terms in a single **Search for** box
  - Typing **and** to combine the terms is optional. The system "**and**s" terms by default; that is, it finds records that contain all of the terms.

    Type **or** between terms to find records containing any of the terms, or type **not** between terms to find records that exclude terms.
  - Type proximity operators **with** (**w**) or **near** (**n**) to combine the search terms. Add numbers (1 to 25) to specify the number of intervening words.
  - Enclose words in quotation marks to find the exact sequence of words.
    Examples:
    natural and foods
    natural w1 foods
    "natural foods"
- To search multiple indexes, enter search terms in separate **Search for** boxes.
  - Select an index from the lists to the right of the **Search for** boxes.

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> **Note:** You can also type an index label (with a colon or equal sign) preceding the search in the Search for box to override any selection in the index list. If you do not type an index label, Connexion always uses the index selected in the list.

- Select an operator **AND**, **OR** or **NOT** from the lists to the left of the Search for boxes to combine search terms in separate boxes for separate indexes
- For an OCLC Control Number search, select the index from the list, or precede the number with the index label (**no:**), an asterisk (*****), or the number sign (**#**). To add the OCLC number index to the short index list, see "Customize WorldCat search and browse interfaces."
- For an ISBN search, select the ISBN index from the list, or precede the number with the index label (**bn:**).

- **Optional–use wildcards, truncation, and plurals.** For keyword searches, type symbols for wildcards (**#** or **?**), truncation (*****), and plural endings (**+**) in place of characters to expand a search term. (See detailsbelow.)
  Note:
  - Wildcard, truncation, and plural stemming symbols must be preceded by at least three characters.
  - These symbols are not supported for non-Latin-script search terms.
- **Optional.** Enter or select qualifiers (see step 6 in the procedure above).

Search for words, phrases, or whole phrases

Searching and browsing using word, phrase, and whole phrase indexes are available for most keyword, numeric, and browse indexes.

Examples:

Title (ti:) [word index]
Title Phrase (ti=)
Title Whole Phrase (tiw=)

The following table shows how Connexion searches an index for words, phrases, and whole phrases and gives examples and guidelines:

Index	Matches search against ...	Examples/Guidelines for Command Line Search area*
Word (Includes both keyword and numeric terms) Use a colon (:)	Individual words (or numeric term) anywhere in an indexed field	Publisher: **pb:dakota** Dewey Class Number: **dd:616** LC Class Number: **lc:Z5074.G8**
	Enter multiple words to a single index. Or Enclose the words in marks to match the exact sequence of words Or Use with (w) or near (n) with number (1 to 25) to match the sequence of words with a specified number of words between	Title: ti:asian crisis (finds any instance of the presence of both terms in the title index ti:"asian crisis" (finds only instances of the exact term in the title index) ti:asian w2 crisis (finds instances of the two terms when the first term precedes the second term within two words)
Phrase Use an equal sign (**=**)	Multiple words in sequence within a single subfield, beginning with the first word in the subfield and including all data in the subfield	Personal Name Phrase: **pn=james, henry** Publisher Phrase: **pb=namgyal institute of tibetology** • Enter multiple words in order from the beginning of the first subfield of an indexed field. • Enter all data from the subfield or truncate using the asterisk (*****). **Alternative:** Use a browse search in the Command Line. It is the only type of search that automatically truncates phrases. • Omit initial articles in titles.

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Index	Matches search against ...	Examples/Guidelines for Command Line Search area*
Whole Phrase Use an equal sign (**=**) Whole phrase index labels end in the letter **w**	Multiple words in sequence within a single field, beginning with the first word in the field, across multiple subfields, and including all data in the field.	Personal Name Whole Phrase: **pnw=james, henry 1843-1916** Subject Whole Phrase: **suw=library science -- computer network resources** - Enter multiple words in order from the beginning and include data from all subfields. Or - Truncate data using an asterisk (*****). **Alternative:** Use a browse search in the Command Line. It is the only type of search that automatically truncates phrases. - Omit initial articles in titles.

*In the Keyword/Numeric Search area, omit index label and punctuation and select index from list.

Caution: When you enter a phrase in the Command Line to browse, you must use an equal sign, not a colon. If you use a colon with a phrase, the system scans only for the first word of the phrase.

Example:
sca ti:gone with the wind browses only for the word *gone*
sca tiw=gone with the wind browses for the entire phrase

Use wildcards, truncation, and plurals

When searching keyword or numeric indexes, use the following symbols to broaden a search:

- Use the # symbol or **?** as wildcards (masking symbols) to match variant spellings:
    - Replace one unknown character with the **#** symbol.
      Examples:
      adverti#e retrieves *advertise* and *advertize*
      wom#n retrieves both *woman* and *women*
    - Replace multiple unknown characters with the **?** or **?n** symbol (**n** = number of characters; use single digits **1** through **9**).
      Examples:
      computer? retrieves *computer*, *computerization*, or *computerized*
      col?r or **colo?r** retrieves *color* or *colour*
      int?net retrieves *internet* or *intranet*
- Use the ***** symbol to truncate a word or number to retrieve variant endings.
  Example:
  invest* retrieves *investor*, *investing*, *investment fraud*, etc.
- Use the **+** symbol at the end of a singular word to match plural forms ending in **s** or **es**.
  Example:
  business+ retrieves *business* or *businesses*
  lad+ retrieves *lad* or *lads*

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Notes:
- o Wildcard, truncation, and plural ending symbols must be preceded by at least three characters.
- o These symbols cannot be used with non-Latin script search terms.

Use non-Latin script search terms

See more about using non-Latin scripts for cataloging in International/"Use non- Latin scripts for cataloging." The following are search guidelines for using non-Latin script terms.

- Search for records containing non-Latin script data using either script data or romanized (Latin-script equivalent) data.
- Both the Search WorldCat window (**Cataloging > Search > WorldCat** or <F2>) and the Enter Bibliographic Batch Search Key window (**Batch > Enter Bibliographic Search Keys** or <Alt><B><B>) support entering searches in non- Latin scripts.
- Copy and paste non-Latin scripts into the Search windows or the WorldCat quick search box from any Unicode-compliant file.
- Use the same WorldCat indexes (entering labels in Latin script) to search for both Latin and non-Latin script data. There are no separate indexes or index labels for retrieving non-Latin script records.
- Add the same qualifiers (using Latin script) to both Latin and non-Latin script searches.
- Generally, do not use truncation, wildcards, or plural ending symbols with non- Latin script searches.

  Exception: Use truncation for Bengali, CJK (Chinese, Japanese, and Korean), Devanagari, Tamil, and Thai scripts.

- Do not use non-Latin scripts in derived searches.
- See more details on display and sort order of search results that include records with non-Latin scripts in International/"Use non-Latin scripts for cataloging."
- Scripts available are:
  - o Arabic
  - o Armenian
  - o Bengali
  - o CJK (Chinese, Japanese, and Korean)
  - o Cyrillic
  - o Devanagari
  - o Ethiopic
  - o Greek
  - o Hebrew
  - o Syriac
  - o Tamil
  - o Thai
- To view records containing a particular non-Latin script, use the index label vp: and the script designation:
  vp:ara
  vp:arm
  vp:ben
  vp:cjk
  vp:cyr
  vp:dev

vp:eth
vp:gre
vp:hbr
vp:syr
vp:tam
vp:tha

Note: View non-Latin scripts only in the Connexion client. You cannot view multiscripts in the Connexion browser, unless you save the records in the online save file using the Connexion client and then open the save file records in the browser. The browser display of non-Latin scripts in the online save file is read-only.

Tips for catalogers working with WorldCat Arabic and/or Persian records:

Go to **Tools > Options > International** to automatically transliterate romanized data into Arabic script data for Arabic and Persian WorldCat records when you retrieve them from WorldCat interactively (does not work for batch searching). The client automatically transliterates records that have the language code *ara* or *per* but no field 066. Also, select the fields you want auto-transliterated. In the **International** window (**Tools > Options**), click **Choose Fields**.
Or
Transliterate manually field by field using **Edit > Transliterate > Arabic** [or **Persian**].

Tips for catalogers working with CJK scripts:

Use **Edit > MARC-8 Characters > Convert to MARC-8 CJK** to automatically convert any invalid CJK characters in a record.

Use the build-in CJK E-Dicionary (Tools menu) to help select characters.

2. Keyword, numeric, and derived search syntax and examples

See also:

- **Client Quick Reference:** OCLC Connexion Client Quick Reference.
- **Searching WorldCat Quick Reference:** Connexion: Searching WorldCat Quick Reference.
- **Complete, detailed index descriptions:** Searching WorldCat Indexes.

Enter keyword searches

Guidelines

- In the Command Line Search area, always precede the search term with an index label and punctuation (use a colon (:) for words or an equal sign (=) for phrases).
- **Access method index (am:)**
  - Each punctuation mark is treated as a word division. Thus, *www.oclc.org* is treated as three separate words: *www*, *oclc*, and *org*.
  - Omit *http:* and *https:*.
  - Include stopwords when searching the Access Method index (**am:**).

    Example:
    To search for URL *www.poets.org* in the Command Line, type am:poets.
- **Internet qualifier (mt:)**
  - Use the Internet qualifier to limit results to Internet resources only or to non- Internet resources only.
  - The system indexes only records containing field 856 with second indicator value <blank>, 0, or 1 as **Internet**. All other records are considered **Non-Internet**.
  - For a Command Line Search, type **mt:url** to limit to Internet resources. To limit to non-Internet resources, enter not **mt:url**.

Stopwords

The system ignores the following common words in a keyword search statement:

a	but	he	it	so	to	you
an	by	her	its	than	was	
and	for	his	not	that	were	
are	from	if	of	the	when	
as	had	in	on	their	which	
at	has	into	or	there	with	
be	have	is	she	this	would	

To use any of these words as search terms, enclose them in quotation marks.

Example: To search for the title *And Then There Were None*, which includes three stopwords, type **ti:"and" then "there" "were" none**.

Selected indexes and examples

The following table lists often used keyword indexes with labels and examples of word, phrase, and whole phrase searches:

Index	Label	Enter command line search	Enter guided search (select index from list)
Corp/Conf Name	**cn:** (word)	cn:enron	enron
	cn= (phrase)	cn=enron corp	enron corp
	cnw= (whole phrase)	cnw=american journal of nursing company	american journal of nursing company
Name	**au:** (word)	au:palatini	palatini
	au= (phrase)	au=bowers jane palatini	bowers jane palatini
Personal Name	**pn:** (word)	pn:salinger	salinger
	pnw= (whole phrase)	pnw=salinger, pierre	salinger, pierre
Publisher	**pb:** (word)	pb:thousand oaks	thousand oaks
Series	**se:** (word)	se:vgm opportunities	vgm opportunities
	sew= (whole phrase)	sew=gerontological care series no 453- 458	gerontological care series no 453-458
Title	**ti:** (word)	ti:gerontological	gerontological
	ti= (phrase)	ti:gerontological nursing	gerontological nursing

Tips for entering guided keyword searches

- Override the selected index by preceding the search term with another index label and punctuation (for example, in the **Search for** box, type **ti=gerontological nursing** to override another index that is selected in the adjacent list).
- Search for an exact phrase in the selected word index by enclosing the words in quotation marks (for example, in the **Search for** box, type **"gerontological nursing"** with the Title (**ti:**) index selected).

Enter numeric searches

Guidelines

- In the Command Line Search area, always precede the search term with an index label and punctuation (use a colon (**:**) for numbers or an equal sign (**=**) for number phrases).

Exception: The index label and punctuation are optional for an ISBN search if it is the first or only search in the Command Line.

- Type all numbers and letters in all types of number searches, including ISBNs, government document numbers, and publisher numbers (formerly music publisher number).

   Exception: In the publisher number index, data within parentheses in a number is indexed separately. For example, the system treats the publisher number *DKP (CD) 9040* as three separate words. To find the number, type a word search— **mn:dkp cd 9040**. Entering a phrase search for the entire number string— *mn=dkp cd 9040*—does not work. Or you can combine each word as a phrase search using Boolean **and** or **or**—**mn=dkp and mn=cd and mn=9040**.

   Tip for entering ISBN ending in x: You must include the **x** if present in an ISBN.If you routinely enter ISBNs using the number keypad, you can continue to do so by typing the asterisk (*) on the keypad in place of the **x** to truncate the ISBN.

- Omit spaces in numbers.
- Class number searches
   - Include periods when searching for a Dewey Decimal, Library of Congress, National Agricultural Library, Library and Archives Canada, National Library of Medicine, or Universal Decimal class number.
   - Delete all other punctuation.
   - Delete spaces.
      Example:
      To search for National Agricultural Library class number (**ag:**) *A280.29*, type **ag:a280.29** in the Command Line.

   Notes:
- The OCLC number has been an 8-digit number; it now also includes 9-digit numbers. The first nine-digit number will be 100000000. The system automatically duplicates the OCLC number from field 001 in field 035 in all records output from the system.
- As a result of expanding the ISBN to the new 13-digit format, when you take a final action on a record that contains an ISBN in only one format, 10-digit or 13- digit, Connexion automatically generates the other format. ISBNs are stored in 020 fields (repeatable field).

   Search for either the 10- or 13-digit number to retrieve the record.

- See Technical Bulletin 253: ISBN and OCLC Number Changes for details and examples.

Selected indexes and examples

The following table lists six of the most often used numeric indexes with index labels, examples, and guidelines:

Index label	To find ...	Enter command line...	Enter guided search (Select index from list)	Guidelines
ISBN (**bn:**)	0-8247-7142-7	**0824771427** (first or only search term) **bn:0824771427** (not first or only search term)	**0824771427**	Enter all numbers and x, if present.
	0-85109-130-x	**085109130x** (first or only search term) **bn:085109130x** (not first or only search term)	**085109130x**	Omit hyphen. Or Hyphen is optional if using index label. Index label is optional in Command Line search if ISBN is first or only search term. The system identifies the following as ISBNs (with or without hyphens): *1234567890* *123456789x* *123456789X* *1234567890123* (See note preceding this table about 13 digit ISBNs.)
ISSN (**in:**)	1234-5678	**in:1234-5678**	1234-5678	Always include hyphen.
	0098-3527	**in:0098-3527**	0098-3527	
	0018-165x	**in:0018-165x**	0018-165x	
LCCN (**ln:**)	map32-14	**ln:32000014** Or **ln:32-14**	**32000014** Or **32-14**	Enter number with or without hyphen.
	78-52051	**ln:78-52051** Or **ln:7852051**	**78-52051** Or **7852051**	Omit leading zeros in serial number portion.
	2002-580246	**ln:2002-580246** Or **ln:2002580246**	**2002-580246** Or **2002580246**	Include year portion (2 or 4 digits).
	map32-14	**ln:32000014** Or **ln:32-14**	**32000014** Or **32-14**	

Index label	To find ...	Enter command line...	Enter guided search (Select index from list)	Guidelines
Government document number (**gn:**)	A 1.2:R31/14/ 984	**gn:a12r3114984**	**a12r3114984**	Enter all numbers and letters.
	NAS 1.2:SP1/46	**gn:nas12sp146**	nas12sp146	Omit punctuation marks.
OCLC control number (**no:**)	10998406	**no:10998406** Or ***10998406** Or **#10998406**	**10998406** Or ***10998406** Or **#10998406**	For Command Line search, precede number with index label and colon (**:**), asterisk (*****), or number sign (**#**).

For Keyword/Numeric Search for box, optionally, enter with asterisk or number sign instead of selecting an index. |
| Publisher number (**mn:**) | CO 1979-AB5- | **mn:co1979ab5** | mn:co1979ab5 | Enter all numbers and letters

Omit punctuation marks. |
| | BBC 001 | **mn=bbc 001** | **bbc 001**

(select Publisher Number Phrase index) | When searching the phrase index, include spaces in search term.

See an **Exception** note in the numeric search guidelines above. You must treat publisher numbers that have parenthetical data differently in constructing a search, since that data is indexed separately. |

Enter derived searches

How to enter derived searches

A derived search uses a specific number of initial characters from words in a name and/or title. The "derived" segments of the words are separated by commas. The numberand pattern of letters and commas tells the system which WorldCat index to search.

The four derived search formats include the following required number of initial letters and commas:

- Title (**td:**) 3,2,2,1
- Personal name (**pd:**) 4,3,1
- Corporate/conference name (**cd:**) =4,3,1
- Name/title (**nd:**) 4,4
  Notes:
  - o Even if a derived search has fewer than the number of words in a derived search sequence, you must type all required commas.

   o Enter all letters available, even if a name or title segment does not contain the requisite number of letters.

   Example:
   To search for the title *Roots* in the Command Line, type **td:roo,,,**

Guidelines

- Use the correct format for the type of derived search you want to do, whether you use the command line or a guided search (the system does not automatically format derived searches).
- In the command line, enter a derived search with or without an index label if it is the first or only search; otherwise you must use the index label (and punctuation).
- In a guided search, enter only one derived search per **Search for** box.

  Note: You can type an index label and a colon preceding the derived search in the **Search for** box to override any selection in the index list.

- Omit initial articles (*a*, *an*, *the*, and non-English equivalents).
- Include articles found within titles. Include letters, numerals, and these characters:& $ * % @ £
- Exclude punctuation, diacritics, and these characters: - # / + =
- Use a circumflex (**^**) to narrow a search. For a name consisting of only two parts, type a circumflex in the third segment.
  Example:
  To search for *Harvey, Henry*, type **harv,hen,^**
  Exception:
  The circumflex is invalid in a derived title search.
- If a personal name begins with *Mc* or *Mac* followed by an uppercase letter, type **m** and omit **c** or **ac**.
  Example:
  To search for *MacDonald, Marion B.*, type **mdon,mar,b**

Stopwords

When constructing a Corporate/Conference Derived (**cd:**) search, omit the following stopwords from the first segment only. Also omit the stopwords when they appear at the beginning of a corporate/conference name in a Name/Title Derived (**nd:**). Include the stopwords when they are not the first element of a corporate/conference name.

&	Conference	Institution	North	Tennessee
a	Congress	International	North Carolina	Texas
A	Connecticut	Iowa	North Dakota	The
Alabama	Council	Joint	of	U.N.
Alaska	Delaware	Kansas	Office	U. N.
American	Department	Kentucky	Ohio	United Nations
an	Dept.	Louisiana	Oklahoma	United States
and	Division	Maine	on	University
Arizona	East	Maryland	Oregon	U.S.
Arkansas	Federal	Massachusetts	Organization	U. S.
Association	Florida	Meeting	Parliament	Utah
at	for	Michigan	Pennsylvania	Vermont

Australia	France	Minnesota	Rhode Island	Virginia
Board	Georgia	Mississippi	School	Washington
Bureau	Great Britain	Missouri	Seminar	West
California	Hawaii	Montana	Senate	West Virginia
Canada	House	National	Society	Wisconsin
College	Idaho	Nebraska	South	Workshop
Colloquium	Illinois	Nevada	South Carolina	Wyoming
Colorado	in	New Hampshire	South Dakota	
Commission	India	New Jersey	State	
Committee	Indiana	New Mexico	Subcommittee	
Commonwealth	institute	New York	Symposium	

The following table lists the four derived search indexes and gives examples and guidelines:

Index (label)	Format	To find ...	In Command Line Search area, type ...	In Keyword/ Numeric Search area, type ... (select index from list)	Guidelines
Corp/Conf Derived (**cd:**)	4,3,1 Minimum key: 4,1,blank	Hershey Foods Corporation	**=hers,foo,c** Or **cd:hers,foo,c**	hers,foo,c	**Command line search:** Precede search with leading equal sign (=) or use index label and colon (:).
		American Rock Garden Society	**=rock,gar,s** Or **cd:rock,gar,s**	rock,gar,s	
		Adrian College	**=adri,col,** Or **cd:adri,col,**	adri,col,	
		Symposium on a New International Order	**=new,int,o** Or **cd:new,int,o**	new,int,o	
Name/Title Derived (**nd:**)	4,4 Minimum key: 4,4	Hailey Hotel	**hail,hote** Or **nd:hail,hote**	hail,hote	Minimum key for records without 1xx field: blank,4
		Clarke 2001: a space odyssey	**cclar,2001** Or **nd:clar,2001**	cclar,2001	
Personal Name Derived (**pd:**)	4,3,1 Minimum key: 4,1,blank	Becker, George Joseph	**beck,geo,j** Or **pd:beck,geo,j**	beck,geo,j	
		Mozart, Wolfgang Amadeus	**moza,wol,a** Or **pd:moza,wol,a**	moza,wol,a	
		cummings, e. e.	**cumm,e,e** Or **pd:cumm,e,e**	cumm,e,e	
		De Groot, Adriaan	**degr,adr,** Or **pd:degr,adr,**	degr,adr,	
		Kübler-Ross, Elisabeth	**kubl,eli,** Or **pd:kubl,eli,**	kubl,eli,	

OCLC

Index (label)	Format	To find ...	In Command Line Search area, type ...	In Keyword/ Numeric Search area, type ... (select index from list)	Guidelines
Title Derived (**td:**)	3.2.2.1 Minimum key: None	Realism in Modern Literature	**rea,in,mo,**l Or **td:rea,in,mo,l**	**rea,in,mo,**l	Circumflex (**^**) cannot be used
		The Complete Circuit Training Guide	**com,ci,tr,g** Or com,ci,tr,g	com,ci,tr,g	
		I Believe in Unicorns	**i,be,in,u** Or **td:i,be,in,u**	i,be,in,u	
		Hotel	**hot,,,** Or **td:hot,,,**	hot,,,	
		Miracle on 34th Street	**mir,on,34,s** Or **td:mir,on,34,s**	mir,on,34,s	

More search procedures

For instructions for entering command line versus guided searches, for more about the differences in word, phrase, and whole phrase indexes, and for instructions for entering searches in a file for batch processing, see the following topics in this system guide:

- "Search WorldCat interactively"
- "Browse WorldCat"
- "Enter WorldCat searches for batch processing"

3. Customize WorldCat search and browse interface

Use the WorldCat quick search tool

As an alternative to using the Search or Browse WorldCat windows, use the WorldCat quick search tool on the toolbar to enter and send a command line search or browse (index scan). The WorldCat quick search tool displays by default. Toggle between hiding or displaying it using **View > Toolbars > WorldCat Quick Search**. See instructions for using the WorldCat quick search tool in "Search WorldCat interactively" in this booklet.

The remainder of this topic covers ways to customize the Search and Browse WorldCat windows if you use them instead of the WorldCat quick search tool.

Show only command line search in search window

If you use only command line searches (entering full search syntax), collapse the search window to show only the command line:

Action
In the Search WorldCat window (**Cataloging > Search > WorldCat** or <F2>), click **Expand/Collapse**. **Result:** The window collapses to show only the command line search area. To restore the window to full view, click **Expand/Collapse** again.

Select short or full index list in search or browse window

When entering guided searches or browse terms, use short of long index lists from which to choose:

	Action
1	In the Search WorldCat window (**Cataloging > Search > WorldCat** or <F2>), in the upper right corner of the Keyword/Numeric Search area above the index drop-down list, click [+] to change to the comprehensive list of search indexes (over 90 indexes). Or In the Browse WorldCat window (**Cataloging > Browse> WorldCat** or <Ctrl><F2>), above the index list, click [+] to change to the comprehensive list of browse indexes (over 50 indexes). **Default lists:** Short search index list of the 10 most used Short browse index list of the 10 most used **Result:** - The plus button becomes a minus button [-]. - The client retains your selection only if you complete a search before closing the Search WorldCat window. **Note:** The index lists display labels and correct punctuation for each index. A single type of index may include separate indexes/labels for words, phrases, and whole phrases. **Example:** **Title (ti:)** **Title Phrase (ti=)** **Title Whole Phrase (tiw=)**
2	To restore the short list, click [-].

Note: The names of new indexes, along with the labels for command line searching, for retrieving SCIPIO records (Sales Catalog Index Project Input Online) will be included in the comprehensive index list, possibly as soon as July 2007. Some of the SCIPIO indexes will also be included in the Browse WorldCat comprehensive index list. The word *SCIPIO* precedes each index name in the alphabetized list for ease of locating the indexes.

SCIPIO records are due to be added to WorldCat after this version of Connexion client (2.00) is released. Adding these records is part of the process of integrating the RLG Union Catalog into WorldCat.

OCLC will announce the availability of SCIPIO records. The new indexes will become visible and usable in the client at that time.

Default short search index list:

Corp/Conf Name (**cn:**)	Publisher (**pb:**)
ISBN (**bn:**)	Publisher Number (**mn:**)
LCCN Phrase (**ln=**)	Series (**se:**)
Name (**au:**)	Standard Number (**sn:**)
Personal Name (**pn:**)	Title (**ti:**)

Default short browse index list:

Corp/Conf Whole Phrase (**cnw=**)	Publisher Phrase (**pb=**)
Dewey Class Number (**dd:**)	Publisher Number (**mn:**)
LC Class Number (**lc:**)	Series Whole Phrase (**sew=**)
Name Whole Phrase (**auw=**)	Subject Whole Phrase (**suw=**)
Personal Name Whole Phrase (**pnw=**)	Title Whole Phrase (**tiw=**)

Customize short index list in search or browse window

For guided searching or browsing, add or delete indexes and rearrange the short list:

	Action
1	In the Search WorldCat window (**Cataloging > Search > WorldCat** or <F2>), in the upper right corner of the Keyword/Numeric Search area, click 🖳. Or In the Browse WorldCat window (**Cataloging > Browse> WorldCat** or <Ctrl><F2>), click 🖳 to change to the comprehensive list of browse indexes (over 50 indexes).

2	In the Customize Short List of Indexes window, click to select an index in the list, and then:
	• Click **Move Up** or **Move Down** to move one index at a time up or down to change the order of the list
	• Click **Remove** to remove the selected index
	• Click **Restore Defaults** to restore the list to its original state (see a list of default search indexes and a list of default browse indexes)
	• Click **Modify** to open the Choose Short List Items window to select or unselect indexes from the full list of all available indexes:
	
	   a. Click cleared check boxes to select indexes or click selected check boxes to clear them from the short list.
	   b. Click **OK** to save your changes or **Cancel** to cancel changes.
	
	Results:
	• You are returned to the Customize Short List of Indexes window.
	• The indexes you selected are now in the short list and indexes you cleared are now omitted from the short list.

3	When finished, click **OK** to save your settings or **Cancel** to cancel changes you made.
4	To save your settings, complete a search before closing the Search WorldCat window.

Establish a "default" search index

For guided searching or browsing, the client always keeps the last index you selected from online session to session, even if the **Retain Search** option is cleared, and even when you click **Clear Search**.

To "reserve a default" index:

Action
In the Search WorldCat window (**Cataloging > Search > WorldCat** or <F2>), select an index in any of the three index lists of the Keyword/Numeric Search area and complete a search using the index. The client keeps the index selected when you reopen the program and the window. Do not change it. In subsequent searches or sessions, always use the **Search for** box associated with your "default" index to search that index only. To search other indexes, use the other **Search for** boxes.

Select short or full language list in search window

For guided searching, use the short or comprehensive Language list in the Keyword/Numeric Search area to limit searches to items in a specific language:

	Action
1	In the Search WorldCat window (**Cataloging > Search > WorldCat** or <F2>), to the right of the **Language** list, click [+] to change the drop-down list of languages to the comprehensive list (includes the hundreds of languages valid for MARC records). **Default selection:** Any **Default list:** Short list of the nine most used languages **Result:** - The plus button becomes a minus button [-]. - The client retains your selection only if you complete a search before closing the Search WorldCat window.
2	To restore the short list, click [-].

Default short list of languages:

English (**eng**)	Russian (**rus**)
French (**fre**)	Chinese (**chi**)
German (**ger**)	Italian (**ita**)
Spanish (**spa**)	Latin (**lat**)
Japanese (**jpn**)	

Select short or full material type list in search window

For guided searching, use the short or comprehensive Material Type list in the Keyword/Numeric Search area to limit searches to items in a very specific material type:

	Action
1	In the Search WorldCat window (**Cataloging > Search > WorldCat** or <F2>), in the lower right, above the **Material Type** list, click [+] to change the drop- down list of material types to the comprehensive list of over 100 indexed in WorldCat. **Default selection:** Any **Default list:** Short list of the ten most commonly used material types **Result:** • The plus button becomes a minus button [-]. • The client retains your selection only if you complete a search before closing the Search WorldCat window.
2	To restore the short list, click [-].

Default short list of material types:

Biography (**bio**)	Government publication (**gpb**)
CD audio (**cda**)	Juvenile (all types) (**juv**)
Computer game (**cgm**)	Thesis/dissertation (**deg**)
DVD video (**dvv**)	VHS tape (**vhs**)
Fiction (**fic**)	Web access (**web**)

See a complete list of material type indexes in the Searching WorldCat Quick Reference.

See more details about what information is indexed for material types in Searching WorldCat Indexes.

Customize short material type list

For guided searching, add or delete material types or rearrange the short list:

	Action
1	In the Search WorldCat window (**Cataloging > Search > WorldCat** or <F2>), in the lower right, above the **Material Type** list, click 🖼.

2	In the Customize Short List of Material Types window, click to select a material type in the list, and then:
	• Click **Move Up** or **Move Down** to move one index at a time up or down to change the order of the list
	• Click **Remove** to remove the selected material type
	• Click **Restore Defaults** to restore the list to its original state
	• Click **Modify** to open the Choose Short List Items window, which contains the comprehensive list of material types. Select or unselect material types to add to or delete from the short list:
	
	   a. Click cleared check boxes to select material types or click selected check boxes to clear them.
	   b. Click **OK** to save your changes or click **Cancel** to cancel changes.
	
	Results:
	• You are returned to the Customize Short List of Indexes window.
	• The material types you selected are now in the short list, and material types you cleared are now omitted from the short list.

3	When finished, click **OK** to save your settings or **Cancel** to cancel changes you made.
4	To save your settings, complete a search before closing the Search WorldCat window.

Select an option to show search results using GLIMIR clustering

To retrieve "GLIMIR clusters" of records for the same work but with different languages of cataloging:

Action
In the Search WorldCat window (**Cataloging > Search > WorldCat** or <F2>, select the **Display using GLIMIR clustering** check box. See details about how search results and browse results display with the GLIMIR option selected in the section on how to use WorldCat search results. **Note:** This setting does not apply to batch searching.

Caution for using the GLIMIR option: When you select the option to show search results using GLIMIR clustering, only records that have GLIMIR data are retrieved. Any new records that you or other libraries are adding to WorldCat will not have GLIMIR data right away and so will not show in search results, even when you use very specific search criteria such as a known OCLC control number. Remember to check your GLIMIR option in the Search WorldCat window and turn it off if search results do not include records that you know should display.

GLIMIR: What it is and how it works

Records in WorldCat for the same work that have different languages of cataloging (called "parallel" records) are given the same unique Global Library Manifestation Identifier (GLIMIR). Records that have the same GLIMIR number are called a "cluster."

When you select the option to display GLIMIR clusters, the results of a WorldCat search show one representative record for each cluster retrieved, based on which one has the most holdings.

To see a list of all records in a GLIMIR cluster:

Action
Click the representative record displayed in the GLIMIR search results list.   Note that a cluster may have only one record and that clusters may vary over time as records for the item in different languages of cataloging are added to WorldCat.

Bibliographic records always display GLIMIR data

Whether or not you have the GLIMIR search option selected, all OCLC bibliographic records displayed (from WorldCat or from the online or local save file) show the following GLIMIR information:

- Total number of holdings your library has on all records in the GLIMIR cluster to which the record belongs.
- Total number of other holdings in the GLIMIR cluster.

View the GLIMIR cluster for a bibliographic record

Also, whether or not you have the GLIMIR option set, you can display all records in the cluster to which a bibliographic record belongs:

> With a record displayed from WorldCat or from the online or local save file, click **Cataloging > Show > All GLIMIR Cluster Records** (or press <Alt><C><H><G>).

What is the value of GLIMIR clusters?

- GLIMIR clusters aggregate both parallel records for an item and the holdings for those records, including your library's holdings and holdings for all libraries.
- GLIMIR clusters can facilitate selecting a record that most closely matches the item you are cataloging.

For more about GLIMIR, see WorldCat Quality: An OCLC Report.

Select WorldCat search options for displaying results and for SCIPIO records

Select the way you want WorldCat search results to display (in a certain type of list or as full records), and select options for SCIPIO searching.

- **SCIPIO** = Art and Rare Book Sales Catalogs; the only online union catalog of auction catalog records in existence

	Action
1	In the Search WorldCat window (**Cataloging > Search > WorldCat** or <F2>), click **Settings**.
2	In the Search WorldCat Settings window, under **Display Search Results**, select one of the following display options from the **Display search results as** list: **System Default List** (**default**): - Search returns a single record: Results display as a full record - Search returns 2 to 5 records: Results display as a brief list - Search returns 6 to 100 records: Results display as a truncated list - Search returns 101 to 1500 records: Results display as a group list **Brief List** (displays any number of records retrieved) **Truncated List** (displays any number of records retrieved) **Full Record** (if multiple records are retrieved, displays the first full record in the list) **Results:** - Your setting applies to the results of searches in both the Command Line and Keyword/Numeric Search area and to results displayed when you open an entry on a Browse WorldCat List that contains more than one record. - The client retains your selection only if you complete a search before closing the Search WorldCat window. **Note:** If the search retrieves 101 to 1500 records, the group list displays no matter what display you selected. <blockquote>**Exception:** A truncated list can contain more than 100 records if the records are for a single year. If so, only 100 entries display at a time. Use **Next 100 Records** or **Previous 100 Records** on the View menu (or <Page up> and <Page down>) to display other sets of records in the list.</blockquote>**Tip:** While viewing a WorldCat results list, toggle between brief and truncated list displays using **View > List Type**.
3	**Optional.** Click the **Retrieve only SCIPIO records** check box. - With this option selected, Connexion searches only SCIPIO records (that is, those with the code **scipio** in field 042), using both standard WorldCat indexes and SCIPIO indexes. - With this option not selected (**default**), Connexion searches all WorldCat records, including SCIPIO records See more in the *Use SCIPIO Records* guide. Please note: - If you select both **Retrieve only SCIPIO records** and **Display using GLIMIR clustering** options (in the WorldCat Search window), only SCIPIO records are retrieved. - However, each SCIPIO record retrieved is a representative record for a GLIMIR cluster. - When you select an item in the SCIPIO/GLIMIR results list, all records in the cluster display, whether they are SCIPIO or non-SCIPIO records.
6	Click **OK** or press <Enter> to save your setting, or click **Cancel** to cancel changes you made. **Result:** The Search WorldCat Settings window closes and you are returned to the Search WorldCat window.

Quick tips: Features of search and browse WorldCat windows

Use the following features of the Search WorldCat window:

- **Boldface text is visual cue for currently active search area.**
  The client sends only one search at a time (the last search you entered). As a quick visual cue in the full window view, the client displays boldface text in either the Command Line area or the Keyword/Numeric area to distinguish the currently active search area.
- **Retain search check box.**
  To keep the last search(es) you completed, click the **Retain Search** check box. The client supplies the last search(es) you completed, including search terms (in both the command line and guided search boxes), index, Boolean operator, and qualifier selections, whenever the window is closed and reopened.
- **Clear Search button.**
  Click **Clear Search** to clear all search elements at once in both the command line and guided search areas of the Search WorldCat window, except index selections.

Use the following feature in either the Search WorldCat or Browse WorldCat window:

- **Search history list.**
  The client retains up to ten of the last searches you entered in a drop-down list in the boxes where you enter searches. Click the arrow at the right of a box to display and select from a list of the last ten searches you entered in that box.

4. Qualify and combine searches

Qualifiers

Qualify keyword and derived searches to narrow the results or make the searches more precise.

Note: You cannot qualify browse terms.

Qualifiers are simply indexes. Used alone, each might retireve an enormous number of records, but combined with searches in other indexes, they limit or focus the results by adding specific criteria.

WorldCat indexes useful for qualifying searches are:

- Type of material (format) (**mt:** or **mt=**) Includes:
  - Format slash qualifiers. Precede one of the following codes with a slash or with an index label and a colon:
    - Books (**bks**)
    - Computer Files (**com**)
    - Continuing Resources (**cnr**) (formerly named Serials; includes both Serials and Integrating Resources material types, both of which can also be used as slash qualifiers)
    - Integrating Resources (**int**)
    - Maps (map)
    - Mixed Materials (**mix**)
    - Scores (**sco**)
    - Serials (**ser**)
    - Sound Recordings (**rec**)
    - Visual Materials (**vis**)
  - Material type qualifiers. Precede a material type code or single-word name with the word index label **mt:** or precede a multi-word material type name with the phrase index label **mt=**.

    Examples:
    sou,of,mu, and mt:dvv
    sou,of,mu, and mt=cd audio

    See a list of material type names and codes in Connexion: Searching WorldCat Quick Reference.

    See more details about what information is indexed for material types in Searching WorldCat Indexes.

- Year(s) of publication (**yr:**)
- Microform or not microform (**mf:**)
- Cataloging source (Library of Congress) (**dl:**)
- Internet/non-Internet (dt:)
- Language (la:)

See a list of qualifiers and values.

Qualify Command Line searches

Type one or more of the qualifiers listed above as part of a full syntax search in the Command Line Search box of the Search WorldCat window (**Cataloging > Search > WorldCat**):

Action
Slash qualifiers: In the Search WorldCat window, under **Command Line Search**, type search terms (an index label, punctuation, and a keyword, numeric, or derived search), followed by a slash and then a format, years, microform, or source qualifier value (no spaces). **Example:** su:spain/1990/rec Note: Use the slash format only for MARC format, year, microform, or source qualifiers. Or **Qualifier index labels:** Instead of slashes, follow the search with a space, the Boolean operator and, a space, a qualifier label, a colon, and a qualifier value. **Example: su:spain and yr:1990 and mt:rec** **Note:** Use the index label and punctuation for any type of qualifiers.

Guidelines for qualifying command line searches

- Use preceding slashes or index labels with the following four types of qualifiers: type of material, years, microform, or source (/dlc).
- Use index labels only to qualify a search by Internet/non-Internet, language, or specific material types (slashes are unavailable).
- If you use slash qualifiers (format, years, microform, or source), use only one of each in a search.
- Slash qualifiers must appear last in a search.
- Qualifiers with index labels (followed by colons) can appear anywhere in a search, combined with Boolean operators.
- Type qualifiers in any order.

Examples of qualified command line searches using preceding slash or index label

To search for ...	Type ...
Keyword search for a map of Scotland	**su:scotland/map** Or **su:scotland and mt:map**
Derived search for the title Gone with the Wind in book format published in the year1980	**gon,wi,th,y/bks/1980** Or **gon,wi,th,y and mt:bks and yr:1980**

To search for ...	Type ...
Keyword search for the subject Navajo in material type DVD video published in 1980 or later	**su:navajo and mt:dvv/1980-** **Or** **su:navajo and mt:dvv and yr:1980-**
Derived search for the title Gone with the Wind in sound recordings format published between 1970 and 1980	**td:gon,wi,th,w/rec/1970-80** Or **td:gon,wi,th,w and mt:rec and yr:1970-80**

For more details and examples, see How to enter qualifiers and values.

Qualify guided searches in the Keyword/Numeric Search area

Qualify searches in the Keyword/Numeric Search area of the Search WorldCat window by selecting from lists or typing in a text box:

Action
In the Search WorldCat window, under **Keyword/Numeric Search**, after you enter search term(s) and select indexes, select or enter one or more of the following qualifiers: • To limit by language: In the **Language** list, select a language.   **Note:** Use the default short list of the nine most used languages, or click 🗒 to customize the short list, or click ➕ to expand to a comprehensive list of hundreds of languages valid for MARC records.   • To limit by format: In the **Format** list, select **Books**, **Computer Files**, **Continuing Resources**, **Integrating Resources**, **Maps, Mixed Materials, Scores, Serials, Sound Recordings**, or Visual Materials.   • To exclude or limit to internet resources: In the **Internet** list, click **Not Internet** or **Internet**, respectively.   • To limit to materials cataloged by the Library of Congress: In the **Cataloging Source** list, select **DLC**.   • To exclude or limit to microforms: In the **Microform** list, click **Not Microform** or **Microform**, respectively.   • To limit by publication years: In the **Years** text box, type a year or range of years.   • To limit by specific material type:In the Material Type list, select a material type.   **Note:** Select from the default short list of material types, or click 🗒 to customize the short list of material types, or click ➕ to expand to a comprehensive list of over 100 materials types indexed in WorldCat. See the comprehensive list of material types in Connexion: Searching WorldCat Quick References.   **Default for all qualifiers:** Any or [blank]

How to enter qualifiers and values

Qualifier index (label)	Available values	How to enter
Type of material, format (**mt:**)	Books (**bks**) Computer Files (**com**) Continuing Resources (**res**) Integrating Resources (**int**) Maps (**map**) Mixed Material (**mix**) Serials (**ser**) Scores (**sco**) Sound Recordings (**rec**) Visual Materials (**vis**)	Command line search Enter as slash qualifier or use the index label with the following values: **/bks or mt:bks** **/com or mt:com** **/res or mt:res** **/int or mt:int** **/map or mt:map** **/mix or mt:mix** **/ser or mt:ser** **/sco or mt:sco** **/rec or mt:rec** **/vis or mt:vis** To exclude a format, use **not**. **Example: not mt:cnr**
		Guided search In the **Format** list, select a format. See also more specific material type qualifiers below.
	Note: Continuing Resources is now the primary MARC record format, which includes both Serials and Integrating Resources material types. All three are available as slash qualifiers, and all three are listed in the Format list of the Search WorldCat window for limiting guided WorldCat searches.	
Years of publication (**yr**) m=millennium, c=century, d=decade, y=year)	Single year [mcdy] Decade [mcd?] Century [mc??] Single year and all later years [mcdy-] Single year and all earlier years [-mcdy] Range of years: [mcdy-y] [mcdy-dy] [mcdy-cdy] [mcdy-mcdy] No date [0000]	**Command line search** **Enter as a slash qualifier or enter with index label and colon:** **/1994** or **yr:1994** **To exclude a year or years, use not: not yr:1994**
		Guided search In the **Years** box, type a year or range of years.
		Examples: Single year: **1994** Decade: **199?** Century: **19??** Single year and all later years: **1995-** Single year and all earlier years: **- 1995** Range of years: **1980-3** **1980-91** **1980-920** **1980-1920** No date: **0000**

Qualifier index (label)	Available values	How to enter
	• For a year with fewer than four numbers, add leading zeroes. **Example: yr:0099** • For unknown dates (code *u*), substitute zero. **Example:** If Date1 value is 19uu: Type **yr:1900**	
Microform or not microform (**mf:**)	Microform Not microform	**Command line search** Enter as slash qualifier: **/mf** (microform) or **/nm** (not microform) Or enter the index label and one of the following two values: **mf:mic** or **mf:nmc**
		Guided search In the **Microform** list, select **Microform** or **Not Microform**
Source (**dl:** - Library of Congress) Or Source phrase (**cs=** - followed by an OCLC symbol for a library)	Library of Congress/ Program for Cooperative Cataloging Or A library specified by OCLC symbol	Command line search To limit to Library of Congress (LC), enter as slash qualifier: **/dlc** Or Enter the index label and value: **dl:y** To limit to another library, enter phrase index label and OCLC symbol: **cs=abcde** **Note:** The only value for LC is **y**
		Guided search In the **Source** list, select **Any** or **DLC**
Internet (**mt:**)	Internet (Limit results to records for Internet resources) Non-Internet (Exclude records for Internet resources)	Command line search Use the index label and one of the following two values: **mt:url** or **not mt:url** (Unavailable as a slash qualifier)
		Guided search In the **Internet** list, select **Internet** or **Non-Internet**

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Qualifier index (label)	Available values	How to enter
Language (**la:**)	A language you specify. (Limit results to records that describe works in a selected language.) Any: no language specified (Results can include records for works in any language.)	**Command line search** Use the index label and the three-letter MARC code or the name of the language spelled out: **la:spa** or **la:spanish** (Unavailable as a slash qualifier)
		Guided search Under Language, in the default short list of the nine most used languages, list, select a language. Or Click ⬚ to customize the short index list. Or Click ⊞ to expand and select from the comprehensive list of languages valid for MARC records.
Material types (**mt:** or **mt=**)	A material type you specify (Limits the search to records of that type only.) Any: no material type specified (Results contain records for all material types.) **Note:** Material type indexes are also included in one of the primary MARC format indexes: Books, Computer Files, Continuing Resources*, Maps, Mixed Materials, Scores, Sound Recordings, Visual Materials *Formerly called Serials; includes both serials and integrating resources material types	**Command line search** Use the index label, a colon, and the three-letter code for the material type: **mt:dvv** Or Use the index label, an equal sign, a space and the full name of the material type: **mt:dvd video** (Unavailable as a slash qualifier)
		Guided search Under Material Type, in the default short list of the ten most used material types, select a material type. Or Click ⬚ to customize the short list. Or Click ⊞ to expand and select from the comprehensive list of over 100 available material types

Note: The following material type names in the Search WorldCat window list do not match their system names. In a command line search, if you type complete material type names instead of typing codes, type the name shown in boldface type in the second column:

Material type name in Search WorldCat window list	Example: Type system material type name:
International gov publication	**mt=international government publication**
Juvenile (all types)	**mt:juvenile**
National gov publication	**mt:national government publication**
State or provice gov pub	**mt:state or province government publication**

See [Searching WorldCat Indexes](#) for comprehensive descriptions of indexes, including qualifier indexes.

Qualify searches by language of cataloging

Action

In the Search WorldCat window (**Cataloging > Search > WorldCat**), click the check box next to **Apply Language of Cataloging Limiter** and select a language from the list.
• You setting remains in effect for all WorldCat searches from session to session unless you change it.
• This setting applies whether you enter searches in:
   o Command Line Search box
   o Keyword/Numeric Search area
   o Quick search box on the toolbar

Combine search terms, specify proximity, use nesting

Guidelines for combining searches

- Command Line Search area: Type Boolean operators between search terms to combine them; **and** is optional; the system "**and**s" multiple words.
- Keyword/Numeric Search area:
  - Type multiple search terms in a **Search for** box to find records containing all of the terms anywhere in the record (the client "**and**s" the terms automatically).
    Or
  - Combine terms with **or** to find records containing any of the terms) or **not** (to find records that exclude terms).
- To combine search terms in different indexes, type the search terms in separate **Search for** boxes, select an index for each from the index list, and select a Boolean operator from the list of operators.
- Boolean operators are unavailable for browsing (scanning indexes).
- Proximity operators are unavailable for derived searches.
- Type the complete music publisher number or government document number in a combined search. To truncate, you must use the asterisk truncation symbol (*****).
- Type the maximum number of characters for each segment of a derived search, unless using the truncation symbol, when combining with another numeric or derived search.
- Qualifiers apply to both parts of a combined search.

Use the following operators between search terms to narrow or broaden your search or to indicate proximity (see complete procedures for entering searches in "Search WorldCat interactively" and "Enter WorldCat searches for batch processing"):

Boolean operator	Example	What the operator does
and	**Single index:** **and** is system default. The client automatically **"and**s" terms together Command line search example: **su:wom?n and history and new york/1990-** Guided search example: **wom?n and history and new york/1990- (select Subject index from list and type 1990- in Year box)** **Multiple indexes:** Type or select **and** between terms. Command line search example: **su:wom?n and ti:history and pb:new york/ 1990-** Guided search example: • Type wom?n in a text box and select the Subject index • Type history in a separate box and select the Title index • Type new york in a separate box and select the Publisher index • Select **AND** in the operator lists preceding the search term boxes and type **1990-** in the **Years** box	Finds records that contain all combined terms in the same record.
or	Command line search example: **pn:woolf or stephen/1936** Guided search example: **woolf or stephen/1936** (select Personal Name index from list) Or **woolf or stephen** (type **1936** in **Year** box)	Finds records containing any or all terms.
not	Command line search example: **su:civil and war not battle/1970** Guided search example: **civil and war not battle/1970** **(select Subject index from list)** Or **civil and war not battle** (type **1970** in **Year** box)	Excludes the term that follows not.

Boolean operator	Example	What the operator does
with (or **w**)	Command line search example: **ti:aluminum w wiring** Guided search example: (select Title index from list) **aluminum w wiring**	Find records containing both terms, in the order typed, with no words between them. **Alternate technique:** Enclose terms in quotation marks (**"aluminum wiring"**)
	Command line search example: **ti:aluminum w2 wiring** Guided search example: (select Title index from list) **aluminum w2 wiring**	With a number (1 to 25), finds records containing both terms, in the order typed, with no more than the specified number of other words between them.
near (or **n**)	Command line search example: **ti:overview n 1998** Guided search example: (select Title index from list) **overview n 1998**	Find record containing both terms, in any order, with no words between them.
	Command line search example: **ti:chicken n3 egg** Guided search example: (select Title index from list) **chicken n3 egg**	With a number (1 to 25), finds records containing both terms, with no more than the specified number of other words between them.

Nesting. Boolean searches can be nested using parentheses.

Examples:
Command line search:
ut:(civil and war) and (battlefield and command*)
Keyword/Numeric search (select Uniform Title index from the list):
(civil and war) and battlefield and command*)
(select Uniform Title index from the list)

Include an operator as a keyword in a search. To use **and**, **or**, **not**, **with**, or **near** as part of a search statement, enclose it in quotation marks to prevent the system from treating it as an operator.

Example:
To search for the title *Neighbors Near and Far* which includes *near* and *and*, normally treated as operators, type **ti:neighbors "near" "and" far**.

Examples: Qualified and combined searches

See complete procedures for entering interactive searches in "Search WorldCat interactively" or for entering batch searches in "Enter WorldCat searches for batch processing."

Derived search examples		
Examples illustrate ...	**In a command line search, type ...**	**In a guided search, type ... (Select indexes; select or enter qualifiers)**
Qualified search	chi,ma,of,s/1956- Or td: chi,ma,of,s/1956-	**chi,ma,of,s** Select **Title Derived** in the index list; in the **Year** box, type **1956-**
	gon,wi,th,w/bks/1956 Or td:gon,wi,th,w/bks/1956	**gon,wi,th,w** Select **Title Derived** in the index list; in the **Format** list, select **Books**; in the **Year** box, type **1956**
	gon,wi,th,w/bks/19??/mf/ dlc Or td:gon,wi,th,w/bks/19??/ mf/dlc	**gon,wi,th,w** Select **Title Derived** in the index list; in the **Format** list, select **Books**; in the **Year** box, type **19??; in the Microform list, select Microform; in the Source list, select DLC**
	=adri,col,/bks/1970-90 Or cd:adri,col,/bks/1970-90	**chi,ma,of,s** Select **Title Derived** in the index list; in the **Format** list, select **Books**; in the **Year** box, type **1970-90**
	sou,of,mu, and mt=cda video	**sou,of,mu,** Select **Title Derived** in the index list; select **CD audio** in the **Material Type** list
Combined search	**pd:mich,jam,a and td:tal,of,th,s** (single example)	mich,jam,a Select **Personal Name Derived** in the index list; select Boolean operator **AND**; in the next **Search for** box, type: tal,of,th,s Select **Title Derived** in the index list
Qualified and combined search	**pd:mich,jam,a and td:tal,of,th,s/bks/1974** (single example)	mich,jam,a Select **Personal Name Derived** in the index list; select Boolean operator **AND**; in the next **Search for** box, type: tal,of,th,s Select **Title Derived** in the index list, in the Format list, select Books; in the Year box, type 1974

Keyword/Numeric search examples		
Examples illustrate ...	**In a command line search, type ...**	**In a guided search, type ... (Select indexes; select or enter qualifiers)**
Qualified search	dd:616/1980-	616 Select **Dewey Decimal** in the index list; in the **Year** box, type **1980-**
	su:scotland/map	scotland Select **Subject** in the index list; in the **Format** list, select **Maps**
	au:michener and mt:bks	michener Select **Author** in the index list; in the **Format** list, select **Books**
	ti=wizard of oz and mt:dvv	wizard of oz Select **Title Phrase** from the index list; in the **Material Type** list, select **DVD video**
Combined search	ti:gone w2 wind Or ti=gone with the wind	gone w2 wind Select **Title** in the index list
	au:bizet and ti:carmen	bizet Select **Author** in the index list; select Boolean operator **AND** from the list In the next **Search for** box, type: carmen Select **Title** in the index list
	la:french and au:camus	camus Select **Author** in the index list; in the **Language** list, select **French**
Qualified and combined search	au:bizet and ti:carmen/rec/1947	bizet Select **Author** in the index list; select Boolean operator **AND** from the list In the next **Search for** box, type: carmen Select **Title** in the index list; in the **Format** list, select **Sound Recordings**; in the **Year** box, type **1947**
	su:arco venice and mt:bks	arco venice Select **Subject** in the index list; in the **Format** list, select **Books**
	su:basket? navajo and yr:1980-	basket? navajo Select **Subject** in the index list; in the **Year** box, type **1980-**

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Keyword/Numeric search examples

Examples illustrate ...	In a command line search, type ...	In a guided search, type ... (Select indexes; select or enter qualifiers)
	ti:gone w2 wind/bks/19??/mf/ dlc	gone w2 wind Select **Title** in the index list; in the **Format** list, select **Books**; in the **Microform** list, select **Microform**; in the **Source** list, select **DLC**

5. Use WorldCat search results

How results display

The way WorldCat search results are displayed, by default, depends on the number of records found:

Number of records found	The client displays ...
1	**The full record** The record is in local edit mode. To work with the master record, you must lock the record (**Action > Lock Master Record**)
2 to 5	**Brief list** Each entry represents a record and contains a 2-line description The list is sorted: - First by records with no main entry (1xx field), sorted by field 245 - Then alphabetically by field 1xx with secondary sort by field 245
6 to 100	**Truncated list** Presents a one-line entry for each record The sort order and the information extracted for display depend on the index you searched. **Note on truncated lists of more than 100 records.** Truncated lists can contain more than 100 records if records retrieved are for a single year. If more than 100 records are retrieved, only the first 100 are displayed. (Use **Next 100 Records** or **Previous 100 Records** on the View menu to display the next or previous set of records.)
101 to 1,500	**Group list** Each entry represents a group of records Groups of records appear by type of material and year of publication Opening a group list produces a truncated or brief list, depending on how many records are in the group The total number of records retrieved in all groups together is given in the title bar
Over 1500	An error message telling you that the number of records retrieved exceeds system limits. You can revise or limit your search and try again

Tips:

- Select the way you want WorldCat search results to display.
- While displaying WorldCat search results, toggle between a brief list view and a truncated list view using **View > List Type**).

Description of data displayed in WorldCat results lists (group, brief, and truncated)

The title bar of a results list from a WorldCat search identifies the kind of search and shows the search. For example: *[WorldCat Search List: ti:mitchell and yr:1984-5]*

Group list

A group list is usually sorted first by the number of records in the group. The list has three columns:

- Format (format of the records in the group)
- Range of publication dates of the records
  Note: For searches limited to SCIPIO records (from the former Art and Rare Book Sales Catalog database available from RLG), the date column is Date of Sale.
- Number of records in the group

Brief list

A brief list is sorted by main entry, first by records with 245 0[blank], and then by records with combined 1XX and 245 (X - any number). The list has two columns:

- List number for the record (assigned by the system)
- One-line description of the record, including (1) the total number of holdings

The following table shows the types of data that can appear in a brief list entry, if the data is present in the record, given in the order in which the data appears:

Column	Description	
Main Entry	Field 1xx, all subfields except 2, 3, 5	
Uniform title	Field 240 or 243, all subfields except 3, 5 for both fields	
Title	Field 245, all subfields	
Edition	Field 250, 254, 255, 256, or 257, all subfields	
Publication	Field 260, 261, or 262, all subfields	
Description	Field 300 or 305, all subfields for all format types	
Type code	Displays a descriptive label based on combinations of type of material (TMat) and type of record for non-print and manuscript materials See list of labels and codes below.	
Bibliographic level code	Bibliographic level for non-print and manuscript materials:	
	Descriptive Label	**BLvl Code Displayed**
	[ANALYTIC]	a, b
	[COLLECTION]	c
	[SUBUNIT]	d
	[SERIAL]	s
	[INTEGRATING RESOURCE]	i

Column	Description	
Form	Fixed field element Form or, for continuing resources, fixed field element Orig (Form of Original item):	
	Descriptive Label [MICROFILM] [MICROFICHE] [MICROOPAQUE] [LARGE PRINT] [BRAILLE] [REPRODUCTION] [ELECTRONIC]	**Form or Original Code Displayed** a b c d f r s
Control	Fixed field element Ctrl (type of control) If Ctrl = a, displays *[ARCHIVAL CONTROL]*. If blank, no value displays.	
Contributing library type	Displays a three-character code identifying contributing library type: • *SCIPIO* = Sales Catalog Index Project Input Online • *DLC* = Library of Congress • *PCC* = Program for Cooperative Cataloging (PCC) • *NLM* = National Library of Medicine (NLM) • *GPO* = U. S. Government Printing Office (GPO) • *AGL* = National Agricultural Library (NAL) • UKM = British Library (UKM) • NLC = Library and Archives Canada (formerly National Library of Canada **Notes:** • If a designated library creates a record, the system displays the corresponding code from the preceding list. • If two or more designated libraries or PCC participants modify a record, or if the record contains an 042 field with a PCC code, the system displays only the first applicable code that appears in the order of the preceding list. **Examples:** NLM issues a record with *pcc* in field 042 - *PCC* displays NLM issues a record with *lcd* in field 042 - *DLC* displays NLM issues a record with no field 042 - *NLM* displays	
CatL	Language code for the language of cataloging from field 040 subfield b (for example, *dut*, *ger*).	
OCLC number	OCLC control number	
Held	Displays Held if the record has holdings associated with your logon authorization	
Holdings	Total number of holdings	

The following table lists descriptive labels for non-print and manuscript materials that are displayed on type code and material type code or a combination:

Descriptive label displayed	Type code	TMat code
[ARCH/MSS]	b	
[SCORE]	c	
[MUSIC MANUSCRIPT]	d	
[MAPS/ATLAS]	e	

Descriptive label displayed	Type code	TMat code
[MAP MANUSCRIPT]	f	
[FILMSTRIP]	g	f
[MOTION PICTURE]	g	m
[SLIDE]	g	s
[TRANSPARENCY]	g	t
[VIDEORECORDING]	g	v
[SPOKEN RECORDING]	i	
[MUSICAL RECORDING]	j	
[ART ORIGINAL]	k	a
[ART REPRODUCTION]	k	c
[PICTURE]	k	i
[GRAPHIC]	k	k
[TECHNICAL DRAWING]	k	l
[CHART]	k	n
[FLASH CARD]	k	o
[COMPUTER FILES]	m	
[KIT]	o	b
[MIXED MATERIAL]	p	
[DIORAMA]	r	d
[GAME]	r	g
[MICROSCOPE SLIDE]	r	p
[MODEL]	r	q
[REALIA]	r	r
[TOY]	r	w
[MANUSCRIPT]	t	

Truncated list

A truncated list is sorted by the data that corresponds to the index you searched. A keyword title search, for example, is sorted alphabetically by title. Truncated list columns and order vary, depending on the index.

The following table lists the columns containing data that appears in a truncated list, if the data is present in the record:

Column	Description
Main Entry	Field 1xx if present in record
Name	Keyword search: 1xx Derived name/title: • If the title that matched the search is the 245 field, the system displays the 1XX field if present, or the column is blank. • If the matching title is the 130 field, the system displays the 245 field. • If the matching title is neither the 245 or the 130 field, the system displays the 1XX field if present, or the column is blank.
Title	Keyword search: 245 a (or k if no a) Derived search: 130 a, 222 a, 245 a, 246 a, 247 a, 440 a, 700 t, 710 t, 711 t, 730 a, 740 a, 770 t, 773 t, 780 t, 785 t, 787 t, or 830 a

Column	Description
Government Document Number	086 a or 086 z or 074 a
Publisher Number	028 a or 262 c
Name or 245	• If matching field is 245, system displays 1xx if present or the column is blank for that record • If matching field is 130, system displays 245 • If matching field is neither 245 nor 130, system displays 1xx if present or the column is blank for that record
Publisher	260 b, 261 b, or 262 b if present, or the column is blank
Date	Fixed field Date 1
L	One-character code identifying contributing library type: S = Sales Catalog Index Project Input Online (SCIPIO) D = Library of Congress (DLC) P = Program for Cooperative Cataloging (PCC) M = National Library of Medicine (NLM) G = U. S. Government Printing Office (GPO) A = National Agricultural Library (NAL) B = British Library (UKM) C = Library and Archives Canada (NLC) **Notes:** • If a designated library or type of library creates a record, the system selects the appropriate letter from the preceding list in the hierarchy of precedence shown in the list • If two or more libraries or PCC participants or SCIPIO contributors create a record, or if the record contains an 042 field with a PCC or SCIPIO code, the system displays only the first applicable letter that appears. **Examples:** If NLM issues a record that contains pcc in field 042, the system displays **P** If NLM issues a record that contains lcd in field 042, the system displays **D** If NLM issues a record that does not contain field 042, the system displays **M**
Held	The word **Held** indicating that the item is owned by your library, or remians blank if item is not owned
Holdings	Total number of holdings **Note:** By default, the Holdings column is hidden. To add it: Right-click in a list and on the shortcut menu that pops up, click **List Settings**.
Control #	OCLC control number **Note:** By default, the OCLC # column is hidden. To add it: Right-click in a list and on the shortcut menu that pops up, click **List Settings**.
CatL	Language code for the language of cataloging from field 040 subfield b (for example, *ita*, *ger*) **Note:** By default, the CatL column is hidden. To add it: Right-click in a list and on the shortcut menu that pops up, click **List Settings**.

View entries in a group list

Action
To view a list of the records in a group, double-click the group, or highlight it and press <Enter>. If the group contains 6 to 100 records, a truncated list opens. If it contains 2 to 5 records, a brief list opens. **Tip:** To open the next or previous group list without returning to the group list window, on the View menu, click **Navigate Records and Lists > Next Group** (or press <Alt><V><G>) or **Navigate Records and Lists > Previous Group** (or press <Alt><V><V><E>).

View a truncated list of more than 100 records

Truncated lists can contain more than 100 records if records retrieved are for a single year. If a truncated list contains more than 101 records, only the first 100 entries are displayed. To view other entries in the list:

Action
On the View menu, click Navigate Records and Lists > Next 100 Records, or press <Ctrl><Alt><Shift><X>, or press<Page down>. Or Click Navigate Records and Lists > Previous 100 Records, or press <Ctrl><Alt><Shift><U>, or press <Page up>.

How GLIMIR search results display

If you set an option in the Search WorldCat window, search results display a representative record from each GLIMIR cluster retrieved, based on which record in the cluster has the most holdings.

GLIMIR "clusters" are parallel records for the same work that have different languages of cataloging (GLIMIR = Global Library Manifestation Identifier).

The following table describes how WorldCat GLIMIR search results display, depending on the number of clusters retrieved:

Number of GLIMIR clusters retrieved	The client displays

1 to 5	**Brief list**
	The window title indicates that this is a "WorldCat Search GLIMIR Brief List."
	• Each entry is a GLIMIR cluster, represented by the record in the cluster that has the most holdings.
	• Each entry has a 2-line description with:
	 ○ The data described above for a non-GLIMIR WorldCat brief list (that is, with the GLIMIR option cleared).
	 And
	 ○ The following GLIMIR information:
	  ▪ Held in Cluster (the number of records in the cluster that represents items held by your library)
	  ▪ Holdings in Cluster (the total number of holdings for all records in the cluster)
	  ▪ Cluster Count (the total number of records in the cluster)
	Note: In the unique situation where a search retrieves a single GLIMIR cluster containing only one record, the full record displays.

6 to 1,500	**Truncated list**
	The window title indicates that this is a "WorldCat Search GLIMIR Truncated List."
	• Each entry represents the record in the cluster that has the most holdings.
	• Each entry has a 1-line multi-column description with:
	 ○ The columns described above for a non-GLIMIR WorldCat truncated list (that is, with the GLIMIR option cleared).
	 Except that:
	 ○ Instead of "Held" and "Holdings" columns, the following columns with GLIMIR information are displayed by default:
	  ▪ Held in Cluster (the number of records in the cluster that represent items held by your library)
	  ▪ Holdings in Cluster (the total number of holdings for all records in the cluster)
	  ▪ Cluster Count (the total number of records in the cluster)
	Note: GLIMIR truncated lists are sorted the same way as non-GLIMIR truncated lists—by the data that corresponds to the index you searched. If you get a "regular" truncated list when you select an entry to show the records in a particular cluster, the records are sorted by main entry.

Over 1,500	An error message telling you that the number of records the search retrieved exceeds system limits. You can revise or limit your search and try again.

Notes:

• If a GLIMIR list contains more than 100 records, only the first 100 are displayed. You can use **View > Navigate Records and Lists > Next 100 Records** [or
• **Previous 100 Records**] to display the next or previous set of GLIMIR records.

- You can also use **View > List Type > Brief** [or **Truncated**] commands to toggle the display between GLIMIR brief or truncated lists.
- You can select only one entry at a time in a GLIMIR list. When you click an entry, all records in the GLIMIR cluster display, including the representative record in the initial GLIMIR list.
- You cannot save a record in a GLIMIR list to the online or local save file. You must display all records in the cluster and save from that list.

Caution for using the GLIMIR option: When you select the option to show search results using GLIMIR clustering, only records that have GLIMIR data are retrieved. Any new records that you or other libraries are adding to WorldCat will not have GLIMIR data right away and so will not show in search results, even when you use very specific search criteria such as a known OCLC control number. Remember to check your GLIMIR option in the Search WorldCat window and turn it off if search results do not include records that you know should display.

View the records in a GLIMIR cluster

Action
To display all of the records in a cluster, including the representative record in the initial GLIMIR list, click an entry in the GLIMIR search results list.

GLIMIR information displayed in bibliographic records

The following GLIMIR-related information is displayed in all OCLC bibliographic records from WorldCat or from the online or local save file, regardless of whether or not you have the Display using GLIMIR clustering option selected in the Search WorldCat window:

- Total number of holdings your library has on all records within the cluster that the record belongs to.
- The number of other library holdings in the GLIMIR cluster of [X], where X is the total number of records in the cluster.

The information displays beneath the current holdings information in the record.

See the section "Browse WorldCat" for more about results of browsing with the GLIMIR option selected.

Navigate among records and lists

For lists in general, when you have multiple records and lists open, you can use commands on the client View and Window menus, or equivalent toolbar buttons or keystroke shortcuts, to navigate among the open windows. See Basics, Use Client Interface, "Record lists" for general procedures.

Use right-click menu to customize list

	Action
1	Right-click anywhere in a list, and on the pop-up menu, click **List Settings**.
2	**To hide a column:** In the Column Settings window, select a column by its name and click **Hide**. Or Double-click a column to clear the check box next to its name. **To display a hidden column:** Select the column and click **Show**. Or Double-click to select the check box next to the column name. A check mark indicates that the column displays. **Default:** All columns except Holdings and Control # are selected. A check mark indicates that a column is selected.

3	**To change the order of columns:**
	Select each column you want to move, one by one, and click **Move Up** or **Move Down** until it is in the position you want.
	
	Or use the mouse to drag and drop columns in the order you need them:
	
	You can drag and drop columns using the mouse instead of using the right- click menu to change the order of columns:
	   1. Place the cursor over the column heading of the column you want to move.
	   2. Hold down <Ctrl>, left-click and drag the column heading.
	     Or
	     Right-click, hold and drag the column heading.
	
	     While you drag, the cursor becomes a rectangle
	   3. Drop the rectangle on top of the border between two columns where you want to place the column you are dragging.

4	To restore the default order of columns and re-display all columns, click **Reset**.
5	Click **OK** to make your changes and close the window. Or Click **Cancel** to close the window without making the changes.

Resize columns

Action
Move the cursor over the right-hand border of the heading for the column you want to resize until the cursor becomes ↔ . Then click and hold while you drag the border to a new position. To restore column widths to the default, right-click anywhere in the list. On the popup menu, click **Restore List Sizes**. **Result:** In the confirmation message, click **OK** to confirm, or click **Cancel** to keep the column widths as they are. When you repopen a list of this type, the original column widths are restored.

Re-sort a list

Action
Click any column heading to re-sort entries by that column. Or   - For a group list, on the **View** menu, click **Sort by** > **Date**   - For a truncated list, depending on the type of list (author, data, main entry, or title), click **Sort by > Author or Date or Main Entry or Title**, or press <Alt><V><S><A>, <Alt><V><S><E>, <Alt><V><S><M>, or <Alt><V><S><T>, respectively.   - For a brief list, click Sort by > Main Entry, or press <Alt><V><S><E> or <Alt><V><S><M>.

Select multiple records in a list

To select multiple records in a list:

Action
Select adjacent records: Click to highlight the first entry, and then press and hold <Shift> and click the last entry. The entire group of records between the entries is selected. Or Click an entry and hold the mouse button down while you drag the cursor up or down in the list to select the group of records you want. **Select nonadjacent entries:** Click to highlight the first entry. Then press <Ctrl> and click to highlight each additional entry.

Print a list or selected entries

You can print an entire list or print selected entries on a list:

	Action
1	With a WorldCat Search List open, on the File menu, click **Print List**, or press <Shift><F12>. Or Select only entries you want to print, and then on the File menu, click **Print List**, or press <Shift><F12>.
2	If you have multiple records selected, the Print List window opens, with the **Selected Items** button selected by default. Click **OK** to confirm, or select the **All** button to print all records in the list, or click **Cancel** to cancel printing. Otherwise, go to step 3.
3	In the Print window, click **OK** or press <Enter>.

Note: Connexion client uses Internet Explorer (IE) to print records and lists. Therefore, page margins for printing are determined by IE Page Setup settings. To adjust the margins, open the browser, and on the File menu, click **Page Setup**. You can determine other print settings (for example, portrait or landscape orientation) in the client Print window.

For general information on using lists in Connexion client, see "Record lists."

Open a record

Action
In a WorldCat Search Truncated List or WorldCat Search Brief List, double-click an entry or highlight it and press <Enter>. • To open the next record without returning to the list, on the View menu, click **Navigate Records and Lists > Forward**, or click ![icon], or press <F9>. • To open the previous record, on the View menu, click **Navigate Records and Lists > Back**, or click ![icon], or press <Shift><F9>.

Print a record

Action

With a record open, on the File menu, click **Print**, or click   , or press <Ctrl><P>, or press <Alt><F><P>.
 	
Results:
• If you click ![icon] or press <Ctrl><P>, the record prints immediately using your default Windows printer, unless you selected to print records to a file (**Tools > Options > Printing**).
 	
    Note: ![icon] always prints a record. If a list is displayed, the button prints the selected record.
 	
• If you use **File > Print** or press <Alt><F><P>, the Print window opens. Your default Windows printer is selected, but you can select any printer from the list of printers installed on your workstation.
 	
    In the Print window, click **OK** or press <Enter> to print the record.

Note: See Note above in "Print a list" about adjusting page margins for printing.

For general information on using records in Connexion client, see Basics, Use Client Interface, "Records."

Actions on WorldCat records

For a list of available actions on individual WorldCat records, see Cataloging, Take Actions on Bibliographic Records.

You can take the following actions on unchanged WorldCat records selected in a list:

Action	How to
Save Record to Online File	On the Action menu, click **Save Record to Online File**, or press <Alt><A><O>.
Save Record to Local File	On the Action menu, click **Save Record to Local File**, or click , or press <F4>.

See Cataloging, Save Bibliographic Records for more information.

6. Browse WorldCat

Browse WorldCat (scan indexes) – summary

When you browse WorldCat:

- Connexion scans indexes for the exact phrase you type.
- The search term you enter is matched character by character, from left to right against the characters of the terms in the index you specify.
- The client returns a list showing the closest match, along with items that precede and follow the closest match.

The client provides two ways to browse/scan indexes:

- **Guided browse:**
  Use the Browse WorldCat window (**Cataloging > Browse > WorldCat** (or , or <Ctrl><F2>) (see complete procedure below).

  Type the term (word or phrase) in the **Browse for** text box. Omit the Scan command. Select an index from the adjacent list, and click **Browse**.

  Examples:
  To browse for Dewey decimal number *615*, type **615**
  To browse for personal name whole phrase *Henry James*, type **james, henry 1843-1916**

  Or

- **Command line browse:**
- Open the Search WorldCat window, (**Cataloging > Search > WorldCat** (or , or <F2>) (see complete procedure below):

  Or
  Use the WorldCat quick search tool on the toolbar to enter a command line browse (for instructions, see "Search WorldCat interactively"):

  In the **command line** box, type the Scan command (**sca**), the index label with appropriate punctuation (equal sign (**=**) for a phrase or whole phrase index; colon (**:**) for a word index), and then the browse term (word or phrase). Click **Search**.

Command line browse examples:

To browse for Dewey decimal number *615*, type **sca dd:615**

To browse for personal name whole phrase *Henry James*, type **sca pnw=james, henry 1843-1916**

Enter a guided browse

Use the Browse WorldCat window only to do a guided index scan (browse):

	Action
1	Log on to the system. Or On the Cataloging menu, click **Browse > WorldCat**, or click 🖼, or press <F2>, and let the client prompt you to log on before opening the browse window.
2	In the **Browse for** box of the Browse WorldCat window, type the exact term (word or phrase) you want. **Guidelines:** • Begin a phrase with the first word of the field or subfield. • Omit initial articles in a title phrase. • Do **not** enter the Scan command (**sca**).
3	Select an index from the default short list of the 10 most used indexes, or customize the short index list, or switch to the full list of over 50 available indexes (the list displays the label and correct punctuation for each index). See "Customize WorldCat search and browse interfaces" for details. See a comprehensive list of WorldCat indexes with descriptions, guidelines, examples, and fields/subfields indexed in Searching WorldCat Indexes.
4	Click **OK**, or press <Enter>. A WorldCat Browse List opens. See section on WorldCat browse results below.

Enter a command line browse

Use the command line in the Search WorldCat window only to enter a browse in full syntax:

	Action
1	Log on to the system. Or On the Cataloging menu, click **Search > WorldCat**, or click ![icon], or press <F2>, and let the client prompt you to log before opening the search window. The Search WorldCat window opens with the cursor in the **Command Line Search** box.

2	When the Search WorldCat window opens (the cursor is in the **Command Line Search** box):
	    1. Type the Scan command (**sca**), a space, and then the index label.
	    2. For a phrase or whole phrase index, type an equal sign after the index label.
	       Examples:
	       sca mn=bbc 001 or **sca pnw=james, henry**
	
	       Note: You must use an equal sign to browse for a phrase. If you enter a phrase following a colon, the system only searches for the first word of the phrase.
	       Example: sca ti:gone with the wind only browses for the word *gone*.
	
	       For a word (keyword or numeric) index, type a colon after the index label.
	       Example:
	       sca dd:615
	
	    3. Type the exact term (word or phrase) you want. Begin a phrase with the first word of the field or subfield. Type enough of the phrase to distinguish it (you do not need to type the whole phrase). Omit initial articles.
	For more information about browse indexes, see Searching WorldCat Indexes.

3	Click **OK**, or press <Enter>. A WorldCat Browse List opens. See the section on WorldCat browse results below.

Guidelines and tips for browsing (index scanning)

- When you browse for a term, the system scans a WorldCat index (see a partial list in Selected browsable indexes) for the exact term you type.
- **Title phrase indexes.** Both the Title Whole Phrase (**tiw=**) and Title Phrase (**ti=**) indexes include subfields in MARC field 245. However, the Title Whole Phrase index **excludes** 245 b, and the Title Phrase index **includes** 245 b.

    - o Use the **Title Whole Phrase** index to browse for a title proper, or cataloger- constructed title access point.
      The index includes subfields a, n, and p (but not b) in field 245.
    - o Use the **Title Phrase** index to browse for title/subtitle combinations.
      The index includes subfields a and b of field 245.

- When browsing a **phrase** or **whole phrase** index, begin the term with the first word in a field or subfield (excluding initial articles).
- When browsing a **word** index, you are not limited to the first word. A word index scan can match a word that appears in any position within an indexed field or subfield.
- Browsing provides automatic truncation. You do not need to type all words when browsing for a phrase, nor do you need to use the truncation symbol.

  Include enough characters or words to distinguish the browse term you want from similar terms.
  Example:
  To browse for the title *Let Us Now Praise Famous Men*, in the **Browse for** box, you can type **tiw=let us now praise fam**).

- If you are unsure of an exact browse term, use keyword searching instead of browsing.
- For browsing, you cannot use common techniques for search precision or expansion, such as qualifiers, truncation, character masking, plural stemming, or combining terms.
- Include up to 60 letters, numbers, spaces, and these characters: ( ) # &.

  Note: Include the comma in a personal name browse term. Include the period in a classification number.

- Except for a personal name term, include hyphens, or omit them and substitute a space.
- Omit initial articles (*a*, *an*, *the*, and non-English initial articles) from phrase searches.
- If a term has special characters (for example, percent sign (%), ampersand (&), and non-English characters), type, omit, or substitute as described in Searching WorldCat Indexes.
- If you copy the text of a term from a record and paste it into the **Browse for** box (Browse WorldCat window) or into the **Command Line Search** box (Search WorldCat window), remove delimiters, subfield codes, and punctuation (except commas in personal names and periods in class numbers).

See more about word, phrase, and whole phrase indexes in "Search WorldCat interactively."

Browse indexes and examples (10 most frequently used)

The following table lists the most used indexes that appear in the default short list of indexes in the Browse WorldCat window and gives labels and examples.

Index	Label	Enter command line browse (type full syntax)	Enter guided browse (select index from list)
Corp/Conf Whole Phrase	**cnw=**	**cnw=kent state university center for peaceful change**	**kent state university center for peaceful change**
Dewey Class Number	**dd:**	**dd:616**	**616**
LC Class Number	**lc:**	**lc:z5057.g8** (retain the period)	**z5057.g8** (retain the period)
Name Whole Phrase	**auw=**	**auw=dewey, melvil** (retain the comma)	**dewey, melvil** (retain the comma)
Personal Name Whole Phrase	**pnw=**	**pnw=james, henry 1843-1916** (retain the comma)	**james, henry 1843-1916** (retain the comma)

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Index	Label	Enter command line browse (type full syntax)	Enter guided browse (select index from list)
Publisher Phrase	**pb=**	**pb=macmillan**	**macmillan**
Series Whole Phrase	**sew=**	**sew=applied anthropology documentation project**	**applied anthropology documentation project**
Subject Whole Phrase	**suw=**	**suw=library science -- computer network resources**	**library science -- computer network resources**
Title Whole Phrase	**tiw=**	**tiw=journal of the american association for information**	**journal of the american association for information**
Uniform Title Whole Phrase	**utw=**	**utw=concertos harpsichord string orchestra f 44 f major**	**concertos harpsichord string orchestra f 44 f major**
		Note: This example shows uniform title data copied from a record and pasted into the **Command Line** box in the Search WorldCat window or the **Browse for** box in the Browse WorldCat window, with delimiters, subfield codes, and punctuation removed.	

For a complete list of browsable indexes, index labels, and fields/subfields indexed, see Searching WorldCat Indexes.

How browse results display

The results of browsing (scanning) an index produces a list of 25 entries that match or most closely match the browse term you entered. The list shows:

- The number of matching records for each entry. (The number of "hits" will likely not be correct if you have the GLIMIR option selected in the Search WorldCat window. See the section below for more information about how the GLIMIR option affects browse results.)
- The term that matches your browse term most closely, highlighted in the list.

You are not limited to viewing only the 25 displayed terms even though the scroll bar only allows you to move to the top or bottom of the list of 25. See below.

Use WorldCat browse results

To view more terms above or below the 25 terms displayed initially in a browse list:

Action
Press <Up arrow> or <Down arrow> to move the selection up or down one entry. When the first or last record in the displayed 25 entries is selected, <Up arrow> or <Down arrow> displays the previous or next set of 25 entries. Or Press <Page up> or <Page down> to display the previous or next set of 25 entries.

To open a record or list of records represented by a term in a browse results list:

Action
Double-click an entry in the WorldCat Browse List. Or Click to highlight an entry and press <Enter>.   - If the entry represents a single record, the record opens.   - If the entry represents more than one matching record, the client uses your setting for **Search Results Display** in the Search WorldCat window to determine the display.   The default display is determined by the number of records retrieved: ○ If the browse list entry represents one record, the full record opens.   ○ If the entry contains 101 to 1500 records, a group list opens (no matter which option you set in the Search WorldCat window).   ○ If the entry contains 6 to 100 records, a truncated list opens   ○ If the entry contains 2 to 5 records, a brief list opens.

For details about navigating and using lists in Connexion client, see Basics, Use Client Interface, "Record lists."

Browse results with the GLIMIR option selected

- If you have the **Display using GLIMIR clustering** option selected in the Search WorldCat window (**Cataloging > Search > WorldCat**), initial browse results are the same as described above.
- However, when you click an entry in the browse list to see the matching records, a GLIMIR list displays. Each record in the list is the representative record (the one that has the most holdings) of a cluster of records that describe the same work but that have different languages of cataloging (also called "parallel" records).
- The number of entries in the GLIMIR list will likely not match the number of record "hits" in the original browse list.
- When you double-click a representative record in the GLIMIR list, the system displays all records in the cluster.
- In the unique situation where a GLIMIR cluster contains only one record, the full record displays.
- GLIMIR = Global Library Manifestation Identifier. See more about GLIMIR.
- **Caution for using the GLIMIR option:** When you select the option to show search and browse results using GLIMIR clustering, only records that have GLIMIR data are retrieved. Any new records that you or other libraries are adding to WorldCat will not have GLIMIR data right away and so will not show in search results.

7. Enter WorldCat batch search keys

See also:

- The system guide, [Batch Processing in the Client – Overview](#)
- [OCLC Connexion Client Quick Reference](#)
- [Connexion: Searching WorldCat Quick Reference](#)
- [Searching WorldCat Indexes](#)

Non-Latin scripts

The Connexion client supports using these non-Latin scripts for constructing WorldCat search terms: Arabic, Armenian, Bengali, Chinese, Cyrillic, Devanagari, Ethiopic, Greek, Hebrew, Japanese, Korean, Syriac, Tamil, and Thai.

Follow procedures in topics on searching WorldCat. See guidelines below for using non-Latin script search terms.

About batch searching

- The client uses your default bibliographic local save file to store search keys you enter until you run the batch.
- Enter searches the same way you enter command line searches interactively, using full search syntax (see "Search WorldCat interactively/Use the Command Line Search area" for more information).
  Or
  Import search keys from a text file (***.txt**) that contains each search key on a separate line.

  Note: You cannot enter browse terms for batch processing because browsing scans an index and returns a dynamic list of terms that cannot be stored in a local file as can records retrieved by a search.

- After the batch runs, search results are downloaded to the same local file.
- In addition to running batch WorldCat searches, batch download records from the bibliographic online save file.
- Non-Latin scripts are available for WorldCat batch searches.

Set up for batch searching

Go to **Tools > Options > Batch tab** to check or change the following options for batch searching:

- Maximum number of search results to download (**default**: 1 record; **maximum**: 100 records)
- Retain batch search keys for searches that:
  - Find too many matches
  - Find no matches or produce an error

    (**Default**: all settings are cleared)

- Display or print batch reports automatically as soon as the batch is completed (**default:** batch reports display automatically but do not print automatically).

Enter searches for batch processing

	Action
1	Click **Batch > Enter Bibliographic Search Keys**, or press <Alt><B><B>.
2	**Optional.** Change the bibliographic save file in which to enter searches: In the Enter Bibliographic Search Keys window, in the **Local File** list, select a different file. Or Click **Local File Manager** to create or move local files before entering search keys.
3	In the **Query** text box, enter a complete search using full search syntax in the same format as a command line search. See "Search WorldCat interactively/Use the Command Line Search area" for details and guidelines, including notes on entering non-Latin script search terms. **Notes:** • See Total Entered above the Query box for a running total of searches added to the list. • Browsing is not available for batch searching since browsing for a term results in an index list, not records.
4	**Optional.** To enter a diacritic or special character in the search key, click **Enter Diacritics**. See Cataloging, Edit Bibliographic Records, "Insert diacritics and special characters" for more details.
5	**Optional.** Under **Use default index**, select an index to apply to searches you enter. **Default:** None, or the last default index you selected. **Results:** • The client precedes each search with the index label and punctuation (colon(:) or equal sign (=)). **Exception:** Any searches you type with a different index label and punctuation. • The client keeps your default index even when you change to another local file.
6	**Optional.** Append default WorldCat qualifiers: Click the **Apply default WorldCat qualifiers** check box, and type the qualifiers in the adjacent text box. (For more information about how to type qualifiers, see "Qualify and combine searches.") **Example**: Type **/bks/1980-** **Result:** The client adds the qualifiers to each search you add to the list. **Exception:** Any qualifiers you type with an individual search override any default qualifiers.

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	Action
7	Click **Add**, or press <Enter>. **Results:** • The client adds the search to the list. • The last search you entered remains in the **Query** box and is highlighted so that you type the next search without relocating the cursor. • The client displays a running **Total Entered** showing the number of searches you have entered.
8	Continue adding, editing or deleting searches. Besides **Add**, you can use: • **Delete** to delete one or more selected searches in the list • **Replace** to replace a selected search in the list with the search in the **Query** box • **Import** to import search keys from a text file (see section below for instructions). • **Copy** to copy selected search(es) to another local file. The client prompts for the local file to which you want to copy the search(es). The **Copy** button is unavailable until you select search(es) in the list.
9	Click **Save** to save the searches you entered to the local save file.
10	**Optional.** Click **Print** to print the entire list of searches you entered.
11	Click **Close** when finished. **Result:** If you made changes that you did not save, the client asks if you want to save the changes in the local file. Click **OK** to save or click **Cancel**.
12	When ready, open the Process Batch window (**Batch > Process Batch**) and run batch processing (see "Run batch processing" for instructions). **Notes:** • When you run batch searches, in the Process Batch window, enter and apply a My Status or apply your default local constant data to batch downloaded records. • Searches you enter and run successfully are deleted from the file after a batch finishes. Failed searches remain in the file if you set options for retaining them (**Tools > Options > Batch**).

Import searches from a text file

	Action
1	Create an ASCII text file (file extension ***.txt**) of search keys using a basic text editor such as Windows Notepad. • Enter each search key on a new line (type a search key and then press <Enter> to type the next search key, etc.) **Note:** Type a complete search, using full search syntax in the same format you use to enter a Command Line Search in the Search WorldCat window. • Use separate files for importing to the bibliographic local save file and authority local save file. • If you use multiple local files for batch searching, give the text file a unique name.
2	Click **Batch > Enter Bibliographic Search Keys**, or press <Alt><B><B>.

	Action
3	**Optional.** Under **Use default index**, select an index from the list of all available indexes to apply to searches you enter. **Default**: None, or the last default index you selected. **Result:** The client precedes each search with the index label and punctuation (colon (**:**) or equal sign (**=**)). **Exception:** Any searches you type with a different index label and punctuation.
4	**Optional.** To append default WorldCat qualifiers to each search key you import, in the Enter Bibliographic Search Keys window, click the **Apply default WorldCat qualifiers** check box, and type the qualifiers in the adjacent text box. **Example**: Type **/bks/1980-** **Result:** The client adds the qualifiers you type to each search you import. **Exception:** Any qualifiers you type with an individual search override default qualifiers.
5	Click **Import**.
6	In the Windows Open window, type the full path and file name of the text file containing the search keys you want to import, or navigate to the file, and then click **Open**. Or Navigate to the file and click Open. **Result:** The client appends the searches in the text file to any searches already in the Enter Bibliographic Search Keys window.
7	The client asks if you want to delete the import text file. Click **Yes** to delete or **No** to keep the file.

Download records from the bibliographic online save file

At the same time you retrieve WorldCat records via batch searching, you can also retrieve records from the online bibliographic save file:

	Action
1	In the Enter Bibliographic Search Keys window (Batch menu), click the **Retrieve all records from online save file** check box.
2	**Optional.** Under **Limit by Review Status**, click one of the following check boxes: • **Non-Submitted** (retrieves only records you submitted for review to colleagues in other libraries) • **Submitted** (retrieves only records you did not submit for review)
3	**Optional.** Select the **Limit by My Status** check box and enter the My Status for records you want to retrieve in the text box.
4	**Optional.** Select the **Delete downloaded records from online save file** check box if desired. If a record you download is locked: • **With this option cleared:** the master record lock is retained in the online save file • **With this option selected:** the master record lock is released
5	Click **Save** and then click **Close** when finished.
6	When ready, run batch processing (see "Run batch processing" for instructions).

8. Run batch processing

About batch processing

- Batch processing is available for WorldCat and Library of Congress (LC) authority file searches and for processing record actions on bibliographic and authority records.
- Run batch processing for multiple local files at once.
- The client stores searches and actions you set on records until you batch process the file. (See Basics, Manage Local Files, "Manage local files for offline/online cataloging" for more about using local files.)
- After you run a batch, the results are downloaded to the same local file.
- The client creates batch reports stored in the default local file (the reports are not separate files).
- When you run another batch using the same file, data for the new batch run overwrites existing data in the batch reports for the file.
- See alternative quick batch procedure to set or delete holdings on bibliographic records by OCLC number without first downloading the records (see Take Actions on Bibliographic Records, "Batch set or delete holdings by OCLC number").

Set options for batch processing

Go to **Tools > Options > Batch tab** to set the following options:

Option	How to set	Default setting
Number of matches to download for searches	In the Batch tab, under **Searching**, select the number of matches to download from the **Maximum Number of Matches to Download** list.	1 record **Maximum:** 100 records
Retain search keys for failed searches	In the Batch tab, under **Searching**, **Batch Search Keys to Retain**, select check boxes to keep search keys or any of the following search results: • **Errors/Not Found** • **Too Many Matches**	All check boxes cleared No search keys are retained
Requirement: Delete LHRs (local holdings records) when deleting holdings	In the Batch tab, under **Record Actions**, select the **Delete attached LHRs when Deleting Holdings** check box to delete LHRs. **Notes:** • You must set this option to batch delete holdings successfully. • **This setting does not apply to interactive delete holdings:** When you delete holdings interactively (logged on), the system always prompts you to confirm deleting both your OCLC symbol and attached local holdings records.	Check box cleared LHRs retained; batch Delete Holdings actions fail
Mark exports and label printing for batch processing	In the Batch tab, under **Record Actions, Perform local actions in batch**, select check boxes to mark records for batch for: • **Bibliographic Record Export** • **Label Printing** • **Authority Record Export**	Check boxes cleared Exports and label printing are performed immediately whether you are online or offline

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Option	How to set	Default setting
Display or print batch reports automatically	In the Batch tab, select the **Display batch reports automatically** and/or **Print batch reports automatically** check boxes to select either or both of these options.	Display check box is selected; print check box is cleared Batch reports display automatically but do not print automatically

Go to **Batch > Process Batch**, and click **Search Options** to set the following options:

Option	How to set	Default setting
Assign a My Status to downloaded bibliographic or authority records	1. In the Search Options window, under **Downloaded Bibliographic Records** or **Downloaded Authority Records**, select the **Assign My Status** check box. 2. In the box below the check box, type a My Status (up to 40 characters of free text). **Note:** The text box is unavailable until you select the **Assign My Status** box.	Check boxes cleared Text boxes unavailable My Status is not assigned
Apply the default local constant data record to downloaded records	In the Search Options window, under **Downloaded Bibliographic Records** or **Downloaded Authority Records**, select the **Apply default local constant data** check box. **Notes:** • The name of the default local constant data record displays under the check box • If no local constant record is set as the default, the client displays [None], and the check box is unavailable.	Check boxes cleared Constant data is not applied

Prepare to run batch processing

	Action
1	**Required for batch processing:** Set up a default authorization/password for logon. Set up either: • A general default authorization in **Tools > Options > Authorizations** Or • A specific default authorization for the local file in **File > Local File Manager/ Authorization**.
2	To prepare actions on records for batch processing: Save the records to your default local bibliographic and/or authority file and mark with the actions you want to take. See procedures in: • "Take actions on bibliographic records/Set actions...for batch processing" • "Take actions on authority records/Set actions...for batch processing"

	Action
3	To prepare WorldCat or LC authority file searches for batch processing: Enter search keys in the default local bibliographic and/or authority save file (**Batch > Enter Bibliographic** [or **Authority**] **Search Keys**). See procedures in: • "Enter WorldCat searches for batch processing" • "Enter LC authority file searches for batch processing"
4	When ready, run batch processing (see next section).

Run batch processing

	Action
1	On the Batch menu, click **Process Batch**, or press <Alt><B><P>.
2	**Optional.** In the Process Batch window, click **Local File Manager** to open the Local File Manager window for managing local files, if you need to relocate, create, delete, assign authorization, etc., before running a batch.
3	**Optional.** In the Process Batch window, select a local file in the list and click **Enter Search Keys** to check or enter search keys for batch processing, as an alternative to entering them from **Batch > Enter Bibliographic** [or **Authority**] **Search Keys**.
4	In the **Local Files** list, click check boxes to select the local file(s) you want to process. **Notes:** • The default local bibliographic and authority save files are marked with a red check mark. • Select as many local files as you want to process. All files you select are processed at once.
5	Under **Process**, select the types of processing you want to run. Click one or more check boxes to select the following: • **Online Searches** • **Online Record Actions** If you select this process, the check box for **Check date in Replaced** becomes available. Select it to have the system check the master record in WorldCat for a more recent date. • **Exports*** • **Label Printing*** ***Note:** By default, export and label printing occur immediately whether you are logged on or offline. Therefore, you must set the **Perform local actions in batch** options in **Tools > Options > Batch tab** in order to mark records for batch- processing label printing and bibliographic and authority record export. If this option is set, records in either the online or local save file are marked for batch label print or export, rather than printed or exported immediately.
6	**Optional.** Click to select or clear the **Retain file selection** check box. (**Default:** Check box cleared) **Results:** • If this option is selected, the client keeps the same file selections each time you open the window until you change them. • If the option is cleared, the client clears all file selections, and you select the files you want to process each time you open the window.

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	Action
7	Select the processing order for actions on records and for returning search results: For bibliographic records, select one of the following: • Date/Time Added (**default**) • Save File Number • OCLC Control Number • Name • Title **Note:** If you select **Name** for bibliographic records, the client uses a secondary sort by title for records that have no name or have the same name. For authority records, select one of the following: • Date/Time Added (**default**) • Save File Number • OCLC ARN • Heading
8	**Optional.** Click **Search Options** to assign a My Status or apply the default local constant data to downloaded bibliographic or authority records (see section on setting batch options above for details).
9	When finished, click **OK** to run batch processing for the selected local files. Or Click **Cancel** to close the window without running batch processing.
10	For records marked for some actions, the client may ask if you want to save the records to the local file after the batch is finished. Click **Yes** to save or **No** to delete after the batch is completed. **Results:** • The batch runs immediately and includes all selected local files. • The client closes all local file records and lists. • The Connexion Client Batch in Process window shows the type of processing and the full path and file name of the file in process. For searches, the window shows the number of records being downloaded of the total retrieved. • If you selected the option to display and/or print batch reports in **Tools > Options > Batch**, the reports display and/or print. • The status of record actions is updated from **R** (Ready) to **C** (Completed) or **F** (Failed) in the local save file records and on the local save file list the next time you open them. • The client does **not** keep your settings in the Process Batch window (helps prevent re-running a batch by mistake). You must select the file(s) and the processes to run each time. **Exception:** The client retains your file selection, if you clicked the **Retain file selection** check box. • Searches are deleted from the local file unless you set options to keep searches that failed (**Tools > Options > Batch**).
11	**Optional.** To cancel processing during a batch run, click **Cancel Batch** in the Connexion Client Batch in Process window.

Quick batch alternative for bibliographic records to process holdings: Batch process setting or deleting holdings by OCLC numbers only without having to download the records. For procedures, see the next section of this Guide.

Option to check master record before processing actions

Select this option in the Process Batch window to have the client check the Replaced date of the master record against the local file record before batch- processing the action you marked.

- **With this option selected:** If the date in the master record is more recent than the date in the local file record, the action on the local file record fails, and the client downloads the newer record to the local file.
- **With this option cleared:** The client processes your local file records as they are and does not check whether a newer record is available.
- **Whether you have this option selected or not:** The client **always checks** the Replaced date of the master record against the Replaced date of the local record when you process **Replace** on a record. If the date in the master record is more recent, the replace action fails.

Open batch reports

Report types. For the bibliographic local save file(s) in a batch run, the client creates a search report, record action report, export report, and label print report. For the authority local save file(s) in a batch run, the client creates a search, record action, and export report. The client also creates a report for batch holdings by OCLC number.

View reports automatically as soon as a batch finishes. By default, when the client completes a batch run, reports open automatically to show results. The reports open on top of each other, with each window maximized.

You can clear this option or select another option to print batch reports automatically in **Tools > Options > Batch**.

View current batch reports any time after batch finishes. To view the most current batch reports any time:

Action

To view batch results for the default local save files:
 	
On the Batch menu, click **View Reports**. On the submenu, click one of the following (or press the corresponding default keystroke):
   • **Bibliographic Search Report** (or press <Alt><B><V><S>)
   • **Bibliographic Record Action Report** (or press <Alt><B><V><A>)
   • **Bibliographic Export Report** (or press <Alt><B><V><X>)
   • **Label Print Report** (or press <Alt><B><V><L>)
   • **Authority Search Report** (or press <Alt><B><V><U>)
   • **Authority Record Action Report** (or press <Alt><B><V><R>)
   • **Authority Export Report** (or press <Alt><B><V><P>)
   • **Holdings by OCLC Numbers Report** (or press <Alt><B><V><H>)
To view batch results for local files that are not the default:
  1. On the File menu, click **Local File Manager**, or press <Alt><F><F>.
  2. Select the file type and file for which you want to view reports.
  3. Under Batch Reports, click the type of report(s).
  4. Click **View Reports**.
Note: The reports you select open behind the Local File Manager window on top of each other if more than one opens.

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Caution: As soon as you run another batch of searches or actions, the client overwrites the last batch reports with the information for the new batch run(s).

Use batch reports

To print the displayed report:

Action
On the File menu, click **Print**, or click 🖨, or press <Ctrl><P>, and in the Print window click **Print**. Or Select only the test you want to print, click **Print**, and in the Print window under **Page Range**, click the **Selection** button and then click **Print**.

To copy data in a report:

Action
Use the mouse to click and drag through the data to select it for copying (or to select all data, press <Ctrl><A>), and on the Edit menu click **Copy**, or click 📑, or press <Ctrl><C>. Paste the data into an Excel spreadsheet or a text editor for further processing. (If you paste into a spreadsheet, use features of Excel to organize the data.)

Information shown in batch reports

The header of each type of batch report shows:

- **Local File** (full path and file name of the processed file)
- **Session ID**
- **Report Start Time**
- **Session Duration**
- For search and record action reports: Number of bibliographic and authority exports reported for that file

For each type of batch, reports show:

Type of report	Information displayed

Bibliographic and authority batch search reports	• Search errors (this section displays only if the batch had search errors)
	Shows the total number of errors and specifies the type of errors, if present:
	   o Too many matches
	     Shows the number of searches resulting in too many matches and for each, shows search keys and number of records found
	   o Error or records not found
	     Shows the number of searches resulting in errors or records not found and for each, shows search keys and type of error
	• Successful searches (shows the total number)
	For each successful search, shows:
	   o Search key
	   o Number of records found
	   o Local save file number assigned for each record downloaded
	   o OCLC control number or ARN
	   o Title*

Bibliographic and authority batch record action reports	• Validation errors (this section displays only if the batch had action errors)
	Shows the total number of errors and for each error, shows the save file number of the record, OCLC control number or ARN, title, and the action that failed
	• Successful actions (shows the total number) For each successful action, shows:
	   o Save file number of the record you makred with an action for batch processing
	   o OCLC control number or ARN
	   o Title*
	   o The action that succeeded

Bibliographic and authority batch export reports	• Record export errors (this section displays only if the batch had export errors)
	Shows the total number of errors and for each error, shows the save file number of the record, OCLC control number or ARN, and title
	• Successful exports (shows the total number)
	For each successful export, shows:
	   o Save file number of the record exported
	   o OCLC control number or ARN
	   o Title*

Label Print report	• Label print errors (this section displays only if the batch had label errors)
	Shows the total number of errors and for each error, shows the save file number of the record, OCLC control number or ARN, and title
	• Successful label printing (shows the total number)
	For each record that had labels printed successfully, shows:
	   o Save file number of the record for which labels printed
	   o OCLC control number or ARN
	   o Title*

Note on non-Latin script titles in bibliographic records: If linked Latin and non-Latin title fields are in a bibliographic record, the batch report shows both. Otherwise, the batch report includes either the non-Latin script title or the Latin script title, depending on which is in the title field.	

See details about batch holdings on bibliographic records by OCLC number reports in the next section of this Guide.

9. Retrieve local system records using a Z39.50 connection

About retrieving local system records

- Retrieve bibliographic records created in your ILS (Integrated Library System) and import them into the Connexion client.
- Define a use attribute for searching your ILS (**default:** use attribute 12 - [local] Record#).
- A search can retrieve one record at a time.
- A retrieved local record is imported into the client and displayed as a MARC 21- formatted workform. The word *NEW* displays in the upper left corner of the workform, where the assigned OCLC number will display when you add it to WorldCat.
- Once imported into the client, work with the record just as you do with any imported record (see the Import Bibliographic Records guide or client Help for more information).

Set up a connection to a host local system

	Action
1	Click **Tools > Options** (or press <Alt><T><O>). Then click **Z39.50**.
2	Enter settings for your Z39.50 connection (see the list describing the settings immediately following).
3	Click **Local Record Use Attribute** to define a use name and value and other structure, truncation, or relation attributes, if needed, for local file record searching **Default:** Use name: *Local#*; value: *12*; other attributes: *Unspecified*. More information about Z39.50 attributes is available on the Z39.50 Maintenance Agency Web site: • See tables of specific values for attributes, including use attributes at http://lcweb.loc.gov/z3950/agency/defns/bib1.html • See more on the Bib-1 attribute set at http://www.loc.gov/z3950/agency/bib1.html
4	When finished, click **Close**, or press <Enter> to apply the settings and close the window. Or Click **Apply** to apply the settings without closing the window. Or Click **Cancel** to cancel changes.

Z39.50 settings:

Z39.50 setting	Required/optional, or uses default/Description
Description	**Optional.** Use to describe the ILS or a database you set up. **Example:** *MIT*
Host Name or IP Address	**Required.** Enter the local system name or IP. Example: *library.mit.edu*

Z39.50 setting	Required/optional, or uses default/Description
Port Number	**Required.** Enter the local system port number. Example: *9909*
Database Name	**Required.** Not case-sensitive. Example: *mit01pub*
Local Record Use Attribute	**Use attribute is required** (but the client provides a default): Click **Local Record Use Attribute** to check or change the use attribute name and value for searching the local system. **Default name:** *Local#* **Default value:** *12* Other attributes are optional. Select a **Structure**, **Truncation**, or **Relation** attribute value. **Default for all:** *Unspecified*
User Name	**Optional.** If you do not enter this setting in options, the client prompts you to enter it each time you connect (**Tools > Z39.50 > Connect**). Case sensitivity depends on your local system requirements.
Password	**Optional.** If you do not enter this setting in options, the client prompts you to enter it when you connect. You must enter a password when prompted, **unless not required** by your local system. Case sensitivity depends on your local system requirements.
Preferred Message Size	**Default:** *105000* bytes. The client uses the default unless you change it.
Initialization Delay (seconds)	**Optional.** **Default:** *0* seconds Enter the number of seconds you want the client to wait before initializing the connection, if you want a delay.
Maximum Record Size	**Default:** *105000* bytes. The client uses the default unless you change it.
Connection Retries	**Optional: Default:** *0*. Enter the number of times you want the client to try to connect, if you want to re-try automatically.

Z39.50 setting	Required/optional, or uses default/Description
Connection Idle Timeout (minutes)	**Optional:** **Default:** *20* minutes. The client uses the default unless you change it. **Range:** 5 to 20 minutes. **Note:** The Z39.50 session terminates automatically if you do not perform searches within the interval specified in this setting.

Note: If you connect to more than one host or more than one database, change the settings in the **Z39.50** tab before connecting, or create another user profile, enter different settings in the **Z39.50** tab in the new profile, and switch user profiles before connecting.

Connect to a local system host and retrieve a record

	Action
1	Click **Tools > Z39.50 > Connect** (or press <Alt><T><Z><C>).
2	If you did not enter a user name or password in **Tools > Options > Z39.50**, the client prompts you to enter them: 　1.　In the Local System Password window, enter a user name and, if required by your local system, a password. 　2.　Click **OK** to connect and open the Search Local System window, or click **Cancel** to cancel connecting. If you entered a user name and password in the **Z39.50** options page, the client automatically supplies them, connects, and opens the **Search Local System** window.
3	In the **Search Local System window**, in the **Record ID Number** box, type the search term/number for the use attribute you defined for retrieving local records. Or Click the arrow at the right of the box to display a list of up to ten terms you entered previously, and click to select one. **Results:** 　•　If the search is successful, the client imports and displays the record as a workform in MARC format. 　•　If the search fails, the client gives you a message. To try the search again, click **Tools > Z39.50 > Search**.
4	Click **Find** to send the search, **Cancel** to cancel the search and keep the Z39.50 connection open, or **Cancel and Disconnect** to cancel the search and terminate the Z39.50 session.

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	Action
5	**Optional.** To retrieve another local record: 1. Pin the displayed record open (**View > Pinned** or <Shift><F4>) if you want to keep it open. If you do not, the next retrieved record replaces the first and you must do the search again to get the first record back. 2. Click **Tools > Z39.50 > Search** (or press <Alt><T><Z><S>), and enter another search term or number. Work with a record retrieved from your local system the same way you work with other records imported in the client. For example, generate an authority record from a heading in the record, add the record to WorldCat, etc.
6	When finished importing local records (one at a time), click **Tools > Options > Z39.50 > Disconnect** (or press <Alt><T><O><D>).

10. OCLC Connexion cataloging basics

Connexion availability

OCLC Connexion is available 24 hours, Monday through Sunday.

Note: OCLC occasionally conducts maintenance on the system, most usually on Sundays from 2 am to 6 am U.S. Eastern Time. OCLC usually provides advance notice about these maintenance periods via listserv messages and on the system alerts Web page at http://www.oclc.org/support/systemalerts/default.asp.

WorldCat search methods

- Numeric search (using keyword number indexes)
- Derived search (segments derived from words in a name or title separated by commas)
- Keyword search (word and phrase indexes)
- The above search types combined and qualified
- Browse queries (scan a word or phrase index for a character-by-character match or the closest match)

Record size

- Bibliographic records must meet size limits defined in MARC21 standards. The number of characters in a field cannot exceed 9,999. The number of characters in a record cannot exceed 99,999. These limits apply to records provided by the OCLC MARC Subscription service.
- For other offline services that output records and for catalog card production, record size is restricted to 50 variable fields and 4096 characters. Records may be truncated for the output records only. Connexion retains the full-length record.

Non-Latin scripts

The Connexion client supports using these non-Latin scripts for cataloging: Arabic, Armenian, Bengali, Chinese, Cyrillic, Devanagari, Ethiopic, Greek, Hebrew, Japanese, Korean, Syriac, Tamil, and Thai.

See the Connexion client International Cataloging document on the Web or in client Help for more information.

OCLC-MARC Record Subscription service

- The following actions generate an archive transaction in OCLC Cataloging archive–Update Holdings, Produce and Update Holdings, Alternate Produce and Update, Delete Holdings, Replace Record, and Replace and Update Holdings. OCLC Connexion transactions are processed daily to provide various offline products (for example, the MARC subscription file).
- Your bibliographic records will be included in your OCLC-MARC Subscription files.

OCLC Accessions Lists service

Records processed with the Produce and Update Holdings or Alternate Produce and Update action via Connexion are included in OCLC Accessions Lists, an OCLC service you subscribe to separately from Connexion.

In the Connexion client itself, you can print accessions lists using records in the local save file. You can set options, create the content, and print reports to a printer or to an HTML file. See Labels, "Print accessions lists" for details.