



## Quick Reference: Searching, Availability and Requesting an Item

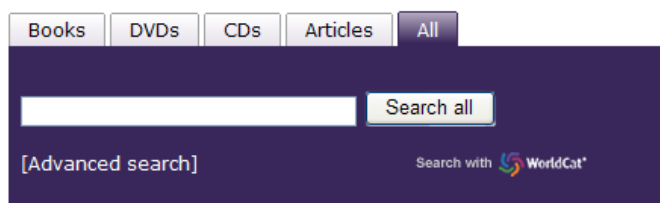
### Introduction

Based on WorldCat holdings, WorldCat Local enables your users to search your local or shared catalog, scope results, and use faceted browsing to identify the location and availability of an item. Users can also initiate an ILL request to get a book, serial, journal, or article from your library, from a library in your group/consortium, or from one of hundreds of WorldCat member libraries.

The *WorldCat Local Quick Reference* is intended for librarians and library staff to assist your users in the use of WorldCat Local. This quick reference describes WorldCat Local's fundamental features and some quick procedures for performing basic or advanced searches, scoping results by location, and determining availability.

### Searching

The WorldCat search box is located on your library's Home page.



#### To conduct a search:

Step	Action	Result
1	Type key search terms in the search box.	
2	Click the button.	Results appear, sorted by location (see <a href="#">Ranking of Search Results</a> ).

**Note:** WorldCat Local has a built-in spell checker that will suggest alternatives if a the search results in no hits.

### Ranking of Search Results

WorldCat Local provides your users with a customized search at multiple levels—local results, group results (if applicable), and global results—all at the same time. It's a way for users to find what they are looking for through your library (even if materials aren't available locally).

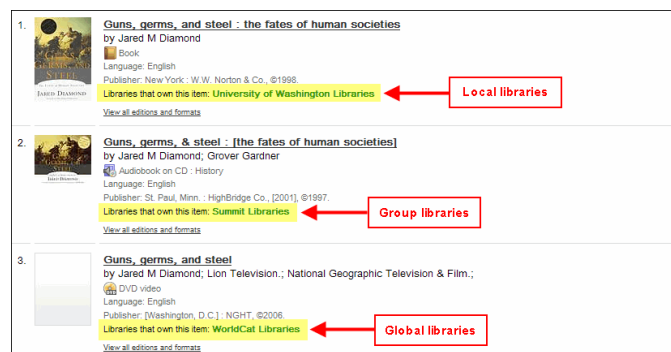
**First Level (Local) results:** When your users search WorldCat Local, results from your library are elevated to the top of the search results.

**Second Level (Group) results (if applicable):** After the first level results are displayed, WorldCat Local will display a second level of results, consisting of all institutions in the group that own an item relevant to the user's search results. An institution can choose the members of this group. For example, institutions with which your library has a consortial borrowing agreement.

**Third Level (Group) results (if applicable):** The institutions in the third level are chosen by you, and hold the relevant items.

**WorldCat (Libraries Worldwide) results:** Search results will be displayed for WorldCat Libraries throughout your state, country and around the world in order of relevance after all local and group results have displayed.

Below is an example of a results display for local, group and global.



OCLC will work with you to configure the local and group search result levels to be displayed in your WorldCat Local interface.

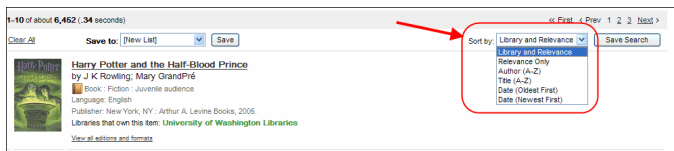
## Relevancy

Relevancy ranking of search results is based on the following:

- Whether the search terms appear anywhere in the WorldCat bibliographic record
- **Note:** Search terms appearing in the title, subject or author fields are ranked highest
- Proximity of the search terms to each other
- How widely held the item is
- How recently the item was published

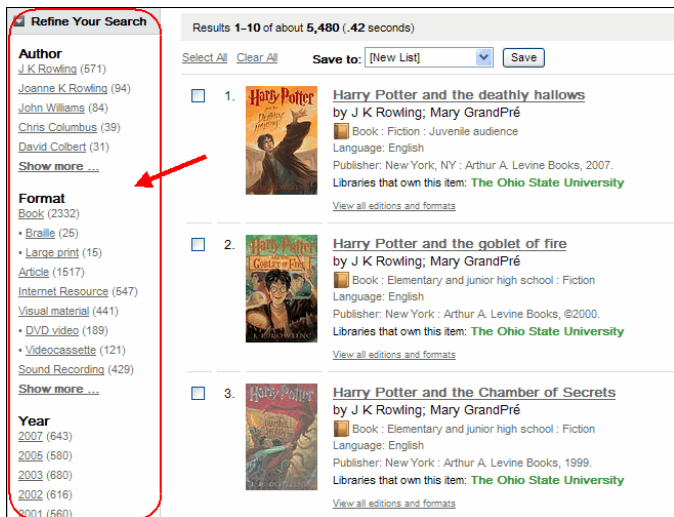
## Sorting by Relevancy

The default search results are sorted by library and relevance as seen in the **Sort by:** drop-down box.



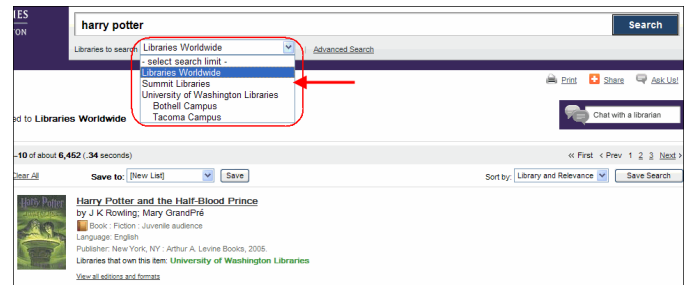
## Refine Your Search

After a search, results can be refined with faceted browsing. To do this, choose an option under one of the facets, such as **Author**, **Format**, **Year**, etc. Click **Show more ...** to see more options under each facet.



## Scoping Your Search

Search results can be limited to certain library levels by scoping the search results.



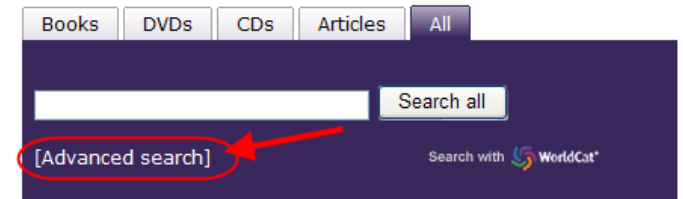
To scope a search:

Step	Action	Result
1	After your search, limit your results by selecting one of the location options in the drop-down box.	
2	Click the <b>Search</b> button.	Results are resorted to the location you chose.

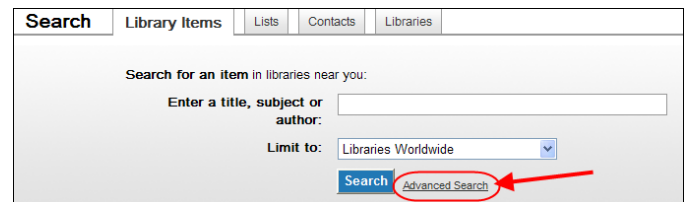
## Advanced Search

The Advanced Search option is available from many locations, including:

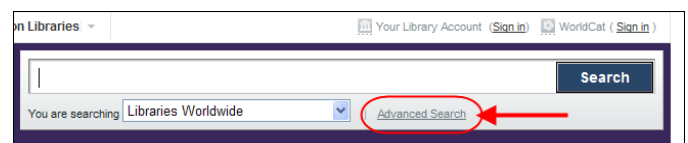
1. The search box on your library's home page.



2. The Advanced Search option from the Search screen.



3. The Advanced Search option from the results page after a basic search.



After selecting any of these options, the Advanced Search screen displays.

In Advanced Search, you may search by:

Field	Returns items:
<b>Accession number</b>	Associated with the designated number
<b>Author</b>	By author
<b>ISBN, ISSN</b>	Associated with the designated number
<b>Journal Source</b>	By journal title
<b>Keyword</b>	With the words appearing anywhere
<b>Subject</b>	In this subject area
<b>Title</b>	With the words in the title

You may also limit search results (optional) by:

Field	Returns only:
<b>Library</b>	Items owned by the selected library level
<b>Year</b>	Items published in a certain date range (whole years only)
<b>Audience</b>	Items for the audience
<b>Content</b>	Items with the content
<b>Format</b>	Items in the format
<b>Language</b>	Items in the language

**To conduct an advanced search:**

Step	Action	Result
1	Type key search terms in at least one field. <b>Note:</b> Available fields vary according to database(s) searched.	
2	<b>Optional.</b> Select values for one or more of the <b>Limit results by</b> fields. <b>Note:</b> Available search limiters vary by database.	
3	Click the <b>Search</b> button.	Results appear, sorted in order of preferences you selected.

**Wildcards**

Wildcards are special characters used to represent additional characters in a search term. They are useful when the user is unsure of spelling, when there are alternate spellings, or when they only know part of a term.

- A pound sign (#), also called a number sign or hash mark, represents a single character. For example, **wom#n** retrieves results for the words *woman* and *women*.
- A question mark (?) represents any number of additional characters. Include a number if you know the maximum number of characters the wildcard will replace. For example, **fine?2** retrieves records that contain the word *fine*, plus up to two other characters, such as *finer*, *finest*.

**Truncation**

Truncation allows a search for a term and its variations by entering a minimum of the first three letters of the term followed by a question mark symbol (?) or an asterisk (\*). For example, **securit?** or **securit\*** retrieves records that contain *security*, *securities*, *securitization*, etc.

**Boolean operators**

Boolean operators are supported as follows:

Operator	Description	A search for...	Will return results...
<b>plus sign +</b>	This is the default search operator. WorldCat searching uses +, which tries to find all of the words typed in the search box. <b>Note:</b> Any search for terms without an operator will return items with all the words.	guns germs steel guns + germs + steel	with <b>all</b> of the words entered into the search box: guns, germs, steel
<b>OR (uppercase only)   symbol</b>	The use of OR, or the   symbol, will search for either of the words listed in the search box.	Paris OR fashion Paris   fashion	with <b>any</b> of the terms entered in the search box: Paris OR fashion

<b>minus sign -</b>	The minus sign will exclude terms from your search.	Paris - fashion	for Paris but not fashion
<b>quotation marks “ ”</b>	To search an exact phrase, the search terms should be enclosed in quotation marks.	“The Grapes of Wrath”	where all words are located directly next to each other in the search results
<b>parentheses ( )</b>	Use parentheses to create more precise searches.	dog (walking OR feeding OR grooming)	for dog walking OR dog feeding OR dog grooming

### Phrase Searching

A phrase search uses quotation marks to allow an exact match to the phrase searched.

#### Examples:

If you type:	Results are returned for:
<b>near east</b>	the words <i>near</i> and <i>east</i>
<b>“near east”</b>	the exact phrase “ <i>near east</i> ”
<b>Byzantine near east</b>	the word <i>byzantine</i> directly before or after the word <i>east</i>
<b>“Byzantine near east”</b>	the exact phrase “ <i>byzantine near east</i> ”

## Item Availability

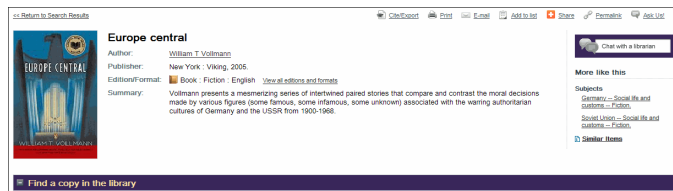
WorldCat Local operates with your Integrated Library System (ILS) in order to provide users real-time item availability information.

### Local Availability

To check availability, click on any item after a search.

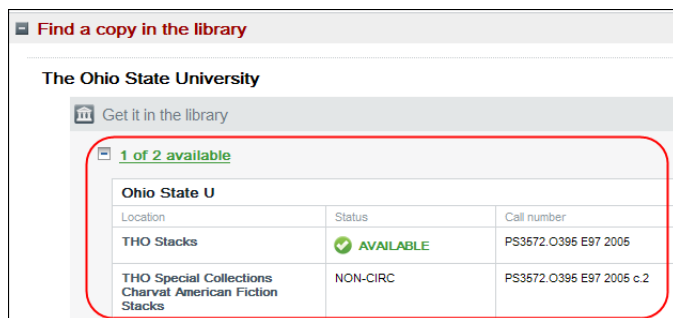


The Item Details screen appears, along with cover art, if available. Other information, such as publisher and edition, also appear.



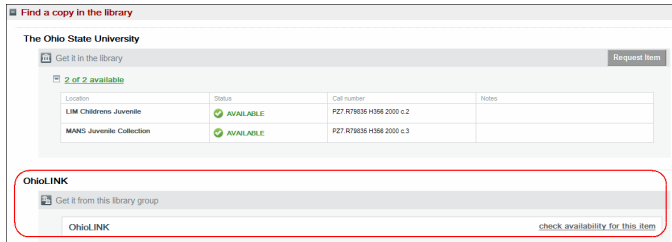
**Note:** Availability information may take a moment.

Once the item’s availability status is retrieved, the item’s location, call number and status are listed under **Find a copy in the library**.

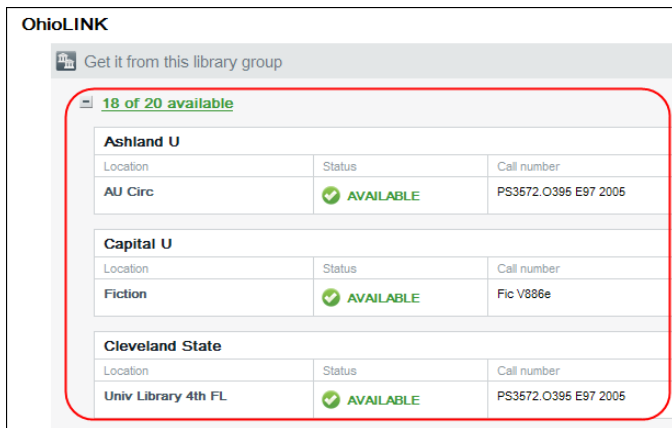


## Group Availability (if applicable)

To find the item at a different location within your group or consortium, click the consortium or group link under **Find a copy in the library**.



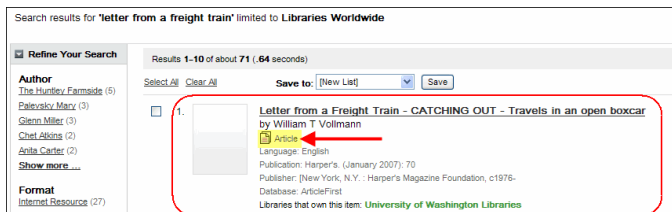
Item availability information is retrieved for the members of the group.



## Article and Electronic Resource Availability

WorldCat Local provides item availability for print articles, and works with your Full Text OpenURL Resolver to provide access to electronic content including articles.

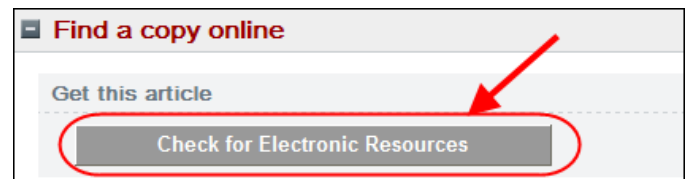
To check availability, click on an article result following a search.



There are two options for getting an article:

1. For online access to an article, click the button under **Find a copy online**. Your OpenURL Resolver provides direct links to the article.

**Note:** There are multiple ways to access electronic resources. Options and button names vary. Citations for articles are included from any article databases for which your library has a subscription. Links may be provided to articles available in full-text or print from your library.

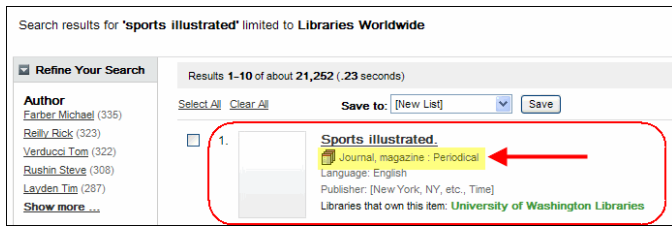


2. To access the paper version of the article, view availability in the list provided under **Find a copy in the library**.

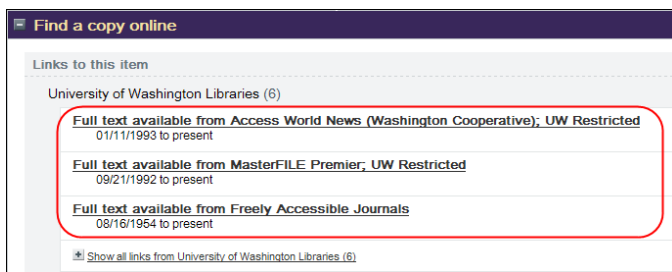


## Serials Availability

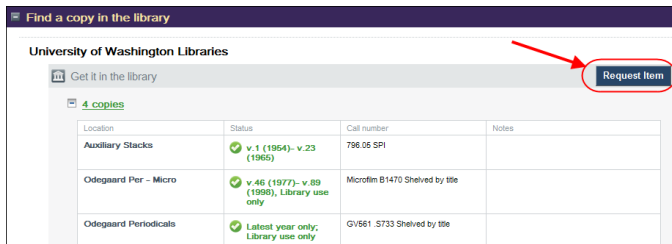
To check availability, click on a serials result following a search.



If any electronic resource links are found in your catalog, they will be displayed under **Find a copy online**.

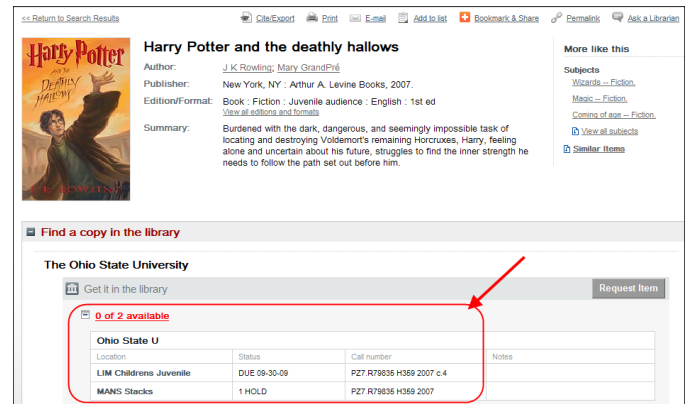


If you allow serials to be requested, the **Request Item** button will display as well.



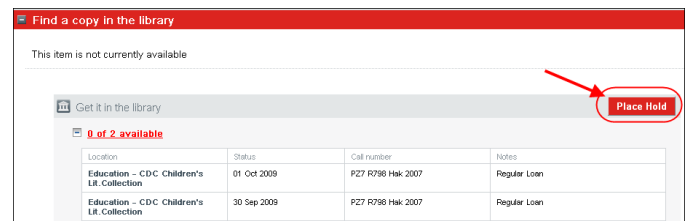
## Requesting an Item

In your search results, WorldCat Local lists relevant items that your library owns first. Actual item availability is listed on the Item Details screen. The item's availability status is listed, along with other information such as location and due date.



## Place Hold

You may choose to display a **Place Hold** button (button text is configurable) to allow users to request an item. When a user clicks on the **Place Hold** button, the user is linked to your library's OPAC.



After clicking **Place Hold**, the user is sent to the library's authentication system.

**Hold Verification**

**Note:** The \$0.75 hold fee will appear on your record at the time the hold is placed. Please complete all of the information below.

Requesting **Light of the moon / Luanne Rice**.

The library has requested this item for you.  
**By submitting this request, you are agreeing to a charge of \$0.75.**

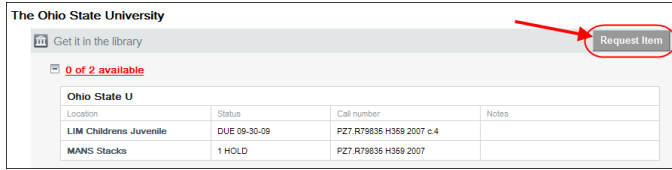
Please enter the following information:

Barcode:  Enter your 14-digit code with no spaces (29099333445551) and press the TAB key

Enter your PIN:  Enter your PIN (usually the last 4 digits of your phone #)

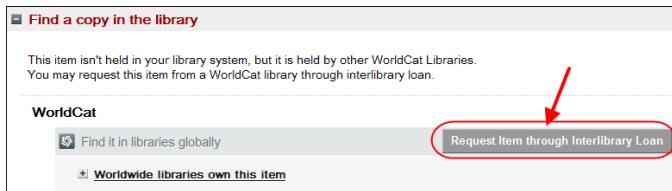
(Choose a Pickup Location)

**Note:** This screen links the user to the library or group's system. The design and content of this page is not changed in any way by WorldCat Local. The phrase **Request Item** may be used instead of **Place Hold** to label the button.



## Requesting an item through Interlibrary Loan

You may decide to display the **Request Item through Interlibrary Loan** button for users to request an item from a different location.



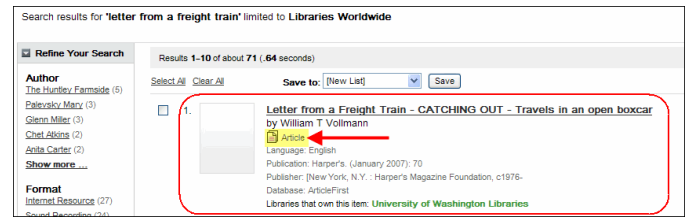
Once the user clicks the **Request Item through Interlibrary Loan** button, he or she is taken to your library's interlibrary loan request page.



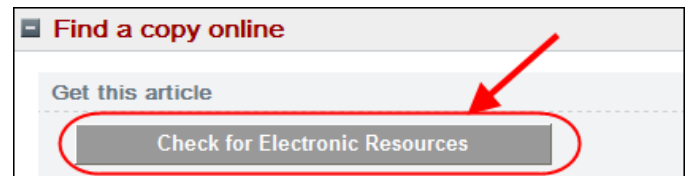
**Note:** The design and functionality of this page is based entirely on your existing interlibrary loan request page. WorldCat Local does not change it. The authentication process the user will need to go through in order to request an item via your system will not be altered by WorldCat Local.

## Requesting an Article/Serial

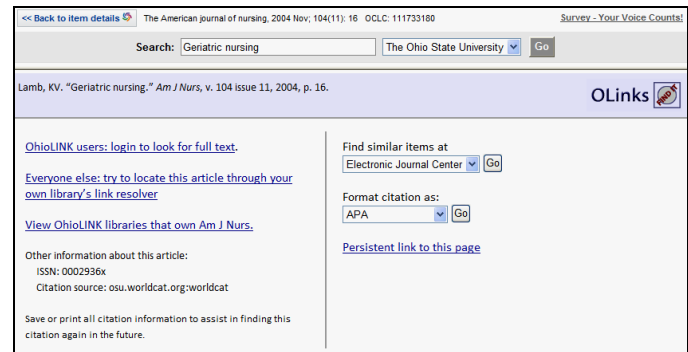
The user can click on an article or serial result after a search to view the item details.



If available, online links to full-text electronic items appear first. If no URL to an electronic version of this article is found, a button displays to provide online access to the article from your library's OpenURL resolver service.



Your OpenURL Resolver provides direct links to the article. The user can then choose a source from which to retrieve the full-text article.



The OpenURL Resolver determines if your library holds the desired article in full-text in any of your subscription databases or online journals, and presents them to the user.

**Note:** If the user is searching from within any of your library's defined IP address ranges, he or she will be linked directly to the resource and not be prompted to authenticate. However, if the user is searching from outside your library's IP address ranges, the user will be asked to authenticate. The authentication process the user will need to go through in order to place a request via your consortial borrowing system will not be altered by WorldCat Local.

### Buy it

If you have enabled the "Buy it" purchase option, links appear in the item details.

Buy it	
Seller	Price
 Amazon.com	\$4.17
 Barnes & Noble	\$17.1
 Better World Books	\$3.98

Clicking the link will result in a search based on the ISBN number (for books) or the journal title (for serials) at suppliers such as Amazon.com or Barnes & Noble. The user can decide whether or not to buy the item.

### Support

#### OCLC support staff:

E-mail: [support@oclc.org](mailto:support@oclc.org)

Telephone: 1-800-848-5800 (USA) or  
+1-614-793-8682

(7:00 a.m. to 9:00 p.m., U.S. Eastern time,  
Monday–Friday)

### Ordering copies of this publication

Step	Action
1	To order additional copies of this publication, send an e-mail to <a href="mailto:orders@oclc.org">orders@oclc.org</a> . Include the product code (REF1124).
2	You may also use the OCLC Index of Documentation at <a href="https://www3.oclc.org/documentation/">https://www3.oclc.org/documentation/</a> . If the <a href="#">Order hard copy</a> link is available, you may use it to request a printed copy.

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Please be specific in your feedback and include titles, product codes, URLs and screen shots, if possible.

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