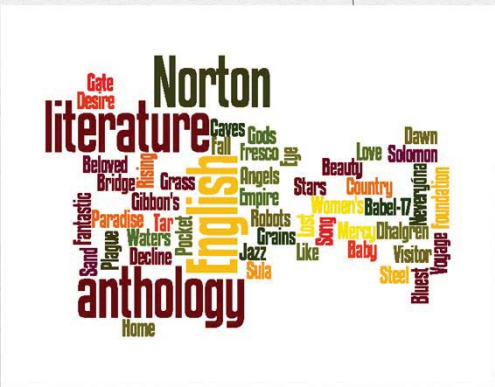
Getting the most out of searching



Elaine Hardy
PINES and Collaborative Projects Manager

Terran McCanna
PINES Program Manager

Agenda

- Search theory and function in Evergreen
- Mechanics and practice of searching in Evergreen
- Tips, tricks, and pitfalls…

Goals

- Better understand search results
- Search more effectively in the PINES database.

MAchine **R**eadable **C**ataloging

standards for the representation and communication of bibliographic and related information in machine-readable form.
(http://www.loc.gov/marc/)

Anglo-American Cataloguing Rules

MARCXML MARC 21 XML Schema

XML schema based on MARC21

Extensible Markup Language (XML) defines & encodes documents so they can be read by people and computers. Designed to carry data, not to display data

MODS Metadata Object Description Schema

XML-based bibliographic description schema

Representation for a bibliographic element set designed for a variety of purposes within library applications.

Designed to carry key data elements from the MARC record but does not define all of the MARC fields and subfields

MARC21 record

LDR		cam a
001		25508902
005		20080610010057.8
008		920219s1993 caua j 000 0 eng
010		92005291
040		DLC ǂc DLC ǂd OCLCQ ǂd BAKER ǂd BTCTA ǂd YDXCP ǂd OCLCG
020		0152038655 : ǂc $15.95
020		9780152038656
042		lcac
050	00	PS3537.A618 ǂb A88 1993
082	00	811/.52 ǂ2 20
100	1	Sandburg, Carl, ǂd 1878-1967.
245	10	Arithmetic / ǂc Carl Sandburg ; illustrated as an anamorphic adventure by Ted Rand.
250		1st ed.
260		San Diego : ǂb Harcourt Brace Jovanovich, ǂc c1993.
300		1 v. (unpaged) : ǂb ill. (some col.) ; ǂc 26 cm.
500		One Mylar sheet included in pocket.
520		A poem about numbers and their characteristics. Features anamorphic, or distorted, drawings which can be restored to normal by viewing from a particular angle or by viewing the image's reflection in the provided Mylar cone.
650	0	Arithmetic ǂv Juvenile poetry.
650	0	Children's poetry, American.
650	1	Arithmetic ǂv Poetry.
650	1	American poetry.
650	1	Visual perception.
700	1	Rand, Ted, ǂe ill.

050	00	PS3537.A618 ǂb A88 1993
082	00	811/.52 ǂ2 20
100	1	Sandburg, Carl, ǂd 1878-1967.
245	10	Arithmetic / ǂc Carl Sandburg ; illustrated as an anamorphic adventure by Ted Rand.
250		1st ed.
260		San Diego : ǂb Harcourt Brace Jovanovich, ǂc c1993.
300		1 v. (unpaged) : ǂb ill. (some col.) ; ǂc 26 cm.
500		One Mylar sheet included in pocket.
520		A poem about numbers and their characteristics. Features anamorphic, or distorted, drawings which can be restored to normal by viewing from a particular angle or by viewing the image's reflection in the provided

MARC21 record

MARCXML


```
− <collection>
  − <record>
      <leader>01142cam 2200301 a 4500</leader>
      <controlfield tag="001"> 92005291 </controlfield>
      <controlfield tag="003">DLC</controlfield>
      <controlfield tag="005">19930521155141.9</controlfield>
      <controlfield tag="008">920219s1993 caua j 000 0 eng </controlfield>
    − <datafield tag="010" ind1=" " ind2=" ">
        <subfield code="a"> 92005291 </subfield>
      </datafield>
    − <datafield tag="020" ind1=" " ind2=" ">
        <subfield code="a">0152038655 :</subfield>
        <subfield code="c">$15.95</subfield>
      </datafield>
    − <datafield tag="040" ind1=" " ind2=" ">
        <subfield code="a">DLC</subfield>
        <subfield code="c">DLC</subfield>
        <subfield code="d">DLC</subfield>
      </datafield>
    − <datafield tag="042" ind1=" " ind2=" ">
        <subfield code="a">lcac</subfield>
      </datafield>
    − <datafield tag="050" ind1="0" ind2="0">
        <subfield code="a">PS3537.A618</subfield>
        <subfield code="b">A88 1993</subfield>
      </datafield>
    − <datafield tag="082" ind1="0" ind2="0">
        <subfield code="a">811/.52</subfield>
```

MRCXML, cont.

```
- <datafield tag="100" ind1="1" ind2=" ">
    <subfield code="a">Sandburg, Carl,</subfield>
    <subfield code="d">1878-1967.</subfield>
  </datafield>
- <datafield tag="245" ind1="1" ind2="0">
    <subfield code="a">Arithmetic /</subfield>
  - <subfield code="c">
      Carl Sandburg ; illustrated as an anamorphic adventure by Ted Rand.
    </subfield>
  </datafield>
- <datafield tag="250" ind1=" " ind2=" ">
    <subfield code="a">1st ed.</subfield>
  </datafield>
- <datafield tag="260" ind1=" " ind2=" ">
    <subfield code="a">San Diego :</subfield>
    <subfield code="b">Harcourt Brace Jovanovich,</subfield>
    <subfield code="c">c1993.</subfield>
  </datafield>
- <datafield tag="300" ind1=" " ind2=" ">
    <subfield code="a">1 v. (unpaged) :</subfield>
    <subfield code="b">ill. (some col.) ;</subfield>
    <subfield code="c">26 cm.</subfield>
  </datafield>
- <datafield tag="500" ind1=" " ind2=" ">
    <subfield code="a">One Mylar sheet included in pocket.</subfield>
  </datafield>
- <datafield tag="520" ind1=" " ind2=" ">
  - <subfield code="a">
      A poem about numbers and their characteristics. Features anamorphic, or distorted, drawings which can be restored to normal by viewing from a particular angle or by viewing the image's reflection in the provided Mylar cone.
```

MARCXML, cont.

```
      </subfield>
    </datafield>
  - <datafield tag="650" ind1=" " ind2="0">
      <subfield code="a">Arithmetic</subfield>
      <subfield code="x">Juvenile poetry.</subfield>
    </datafield>
  - <datafield tag="650" ind1=" " ind2="0">
      <subfield code="a">Children's poetry, American.</subfield>
    </datafield>
  - <datafield tag="650" ind1=" " ind2="1">
      <subfield code="a">Arithmetic</subfield>
      <subfield code="x">Poetry.</subfield>
    </datafield>
  - <datafield tag="650" ind1=" " ind2="1">
      <subfield code="a">American poetry.</subfield>
    </datafield>
  - <datafield tag="650" ind1=" " ind2="1">
      <subfield code="a">Visual perception.</subfield>
    </datafield>
  - <datafield tag="700" ind1="1" ind2=" ">
      <subfield code="a">Rand, Ted,</subfield>
      <subfield code="e">ill.</subfield>
    </datafield>
  </record>
</collection>
```

More information at:
http://www.loc.gov/standards/marcxml/

MODS transformation

```
- <mods xsi:schemaLocation="http://www.loc.gov/mods/ http://www.loc.gov/standards/mods/mods.xsd">
  - <titleInfo>
      <title>Arithmetic /</title>
    </titleInfo>
  - <name type="personal">
      <namePart>Sandburg, Carl</namePart>
      <namePart type="date">1878-1967</namePart>
    - <role>
        <text>creator</text>
      </role>
    </name>
  - <name type="personal">
      <namePart>Rand, Ted</namePart>
    - <role>
        <text>ill.</text>
      </role>
    </name>
    <typeOfResource>text</typeOfResource>
  - <originInfo>
    - <place>
        <code authority="marc">cau</code>
        <text>San Diego</text>
      </place>
      <publisher>Harcourt Brace Jovanovich</publisher>
      <dateIssued>c1993</dateIssued>
      <dateIssued encoding="marc">1993</dateIssued>
      <edition>1st ed.</edition>
      <issuance>monographic</issuance>
    </originInfo>
```

MODS transformation, cont.

```
  <language authority="iso639-2b">eng</language>
- <physicalDescription>
    <form authority="marcform">print</form>
    <extent>1 v. (unpaged) : ill. (some col.) ; 26 cm.</extent>
  </physicalDescription>
- <abstract>
    A poem about numbers and their characteristics. Features anamorphic, or distorted, drawings which can be restored to normal by viewing from a particular angle or by viewing the image's
    reflection in the provided Mylar cone.
  </abstract>
  <targetAudience>juvenile</targetAudience>
- <note type="statement of responsibility">
    Carl Sandburg ; illustrated as an anamorphic adventure by Ted Rand.
  </note>
  <note>One Mylar sheet included in pocket.</note>
- <subject authority="lcsh">
    <topic>Arithmetic</topic>
    <topic>Juvenile poetry</topic>
  </subject>
- <subject authority="lcsh">
    <topic>Children's poetry, American</topic>
  </subject>
- <subject authority="lcshac">
    <topic>Arithmetic</topic>
    <topic>Poetry</topic>
  </subject>
- <subject authority="lcshac">
    <topic>American poetry</topic>
  </subject>
- <subject authority="lcshac">
```

```
        <topic>Arithmetic</topic>
        <topic>Poetry</topic>
    </subject>
  - <subject authority="lcshac">
        <topic>American poetry</topic>
    </subject>
  - <subject authority="lcshac">
        <topic>Visual perception</topic>
    </subject>
    <classification authority="lcc">PS3537.A618 A88 1993</classification>
    <classification edition="20" authority="ddc">811/.52</classification>
    <identifier type="isbn">0152038655 :</identifier>
    <identifier type="lccn">92005291</identifier>
  - <recordInfo>
        <recordContentSource>DLC</recordContentSource>
        <recordCreationDate encoding="marc">920219</recordCreationDate>
        <recordChangeDate encoding="iso8601">19930521155141.9</recordChangeDate>
        <recordIdentifier source="DLC">92005291</recordIdentifier>
    </recordInfo>
</mods>
```

MODS transformation, cont.

MODS Mapping for MARC 21 bibliographic records – Name

name	*(use only if no $t)*
100, 700 ind1=0,1	<name> *with* type="personal"
100, 700 ind1=3	<name> *with* type="family"
100, 700 $0	*add* xlink="contents of $0" (as URI)
100, 700 aq	<namePart>
100, 700 $d	<namePart> *with* type="date"
100, 700 bc	<namePart> *with* type="termsOfAddress"
100, 700 $e	<role><roleTerm> *with* type="text"
100, 700 $4	<role><roleTerm> *with* type="code"
100, 700 $u	<affiliation> *under* <name>
100 *with* 240	*add* nameTitleGroup="1"
110, 710	<name> *with* type="corporate"
110, 710 $0	*add* xlink="contents of $0" (as URI)
110, 710 $a	<namePart>
110, 710 $b	<namePart>
110, 710 cd$n	<namePart>
110, 710 $e	<role><roleTerm> *with* type="text"
110, 710 $4	<role><roleTerm> *with* type="code"
110	<role><roleTerm> *with* type="text" *use text* "creator" *if desired, to maintain indication of "main entry"*
110 *with* 240	*add* nameTitleGroup="1"
111, 711	<name> *with* type="conference"
111, 711 $0	*add* xlink="contents of $0" (as URI)
111	<role><roleTerm> *with* type="text" *use text* "creator" *if desired, to maintain indication of "main entry"*
111, 711 acdenq	<namePart>
111, 711 $4	<role><roleTerm> *with* type="code"
111 *with* 240	*add* nameTitleGroup="1"
720 ind1=blank	<name> *with* no type attribute

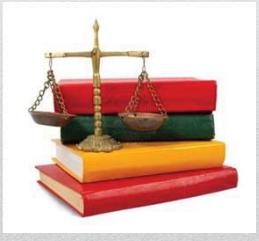
More information at:
http://www.loc.gov/standards/mods/

- **Title** – Generally, MODS titleInfo elements
- **Author** – Generally, MODS name elements
- **Subject** – Generally, MODS subject elements
- **Series** – MODS titleInfo elements within a relatedItem element that has a type attribute of series
- **Keyword** – Everything within the MODS record, except the originInfo element and descendants (control fields, publisher field primarily)
- **Identifier** – Record accession numbers, most MARC standard number fields, and bib-level free-text call numbers such as ISBNs, ISSNs, ISMNs, LCCNs, and OCLC numbers.

Six basic search classes

id	field_class	name	xpath	weight	format	facet_field	Facet Label
120	title	222	MARC Tag 222 subfields ab	1	marcxml	f	222
122	title	240	MARC Tag 240 subfields gn	1	marcxml	f	240
121	title	243	MARC Tag 243	1	marcxml	f	243
123	title	246	MARC Tag 246	1	marcxml	f	246
124	title	247	MARC Tag 247	1	marcxml	f	247
126	title	730	MARC Tag 730 subfields gn	1	marcxml	f	730
127	title	740	MARC Tag 740 subfields anp	1	marcxml	f	740
131	title	505t	MARC Tag 505 subfield t	1	marcxml	f	505t
2	title	abbreviated	MODS32 titleInfo [title and abbreviated]	1	mods32	f	abbreviated
4	title	alternative	MODS32 titleInfo [title and alternative]	1	mods32	f	alternative
6	title	proper	MODS32 titleInfo [title and not]	1	mods32	f	proper
3	title	translated	MODS32 titleInfo [title and translated]	1	mods32	f	translated
5	title	uniform	MODS32 titleInfo [title and uniform]	1	mods32	f	uniform

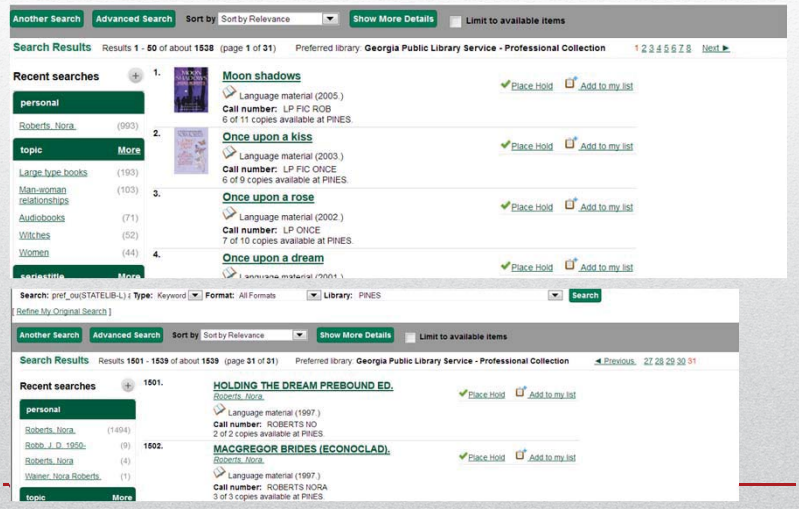
Indexed fields and MODS elements for title search in PINES



Weight

Superpages

Superpage retrieval



Changes to superpage retrieval

Subject: civil war search
Prior to the database cleanup project

After clean-up

In 2.5

Search tips and methodology

- The default search is a keyword search on media of all types at the local library system where the user is logged in.
- All searches are keyword searches, unless using “contains phrase” or “starts with” from dropdown menus.
- In basic and advance searching, your search terms, including author names, can be entered in any order.
- Order matters in browse searching.
- Case is ignored. Lower and upper case letters are treated the same.

Search tips and methodology

- Search terms are stemmed by default.
  - Stemming: searches all forms of the word
  - Matches exactly or enclosing the search terms in “” stops stemming
- You can search partial titles, authors and subject headings.
- You do not need to include punctuation. Punctuation marks within words, with the exception of _, are ignored.
- Most diacritical marks, &, or | located anywhere in the search term are removed.
- All search terms are joined by **and** by default.

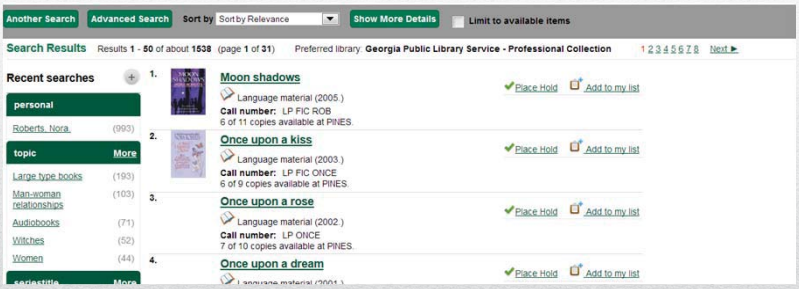
Search tips and methodology

- *And, or, not* are searchable terms in Evergreen and are not used as Boolean operators.
- You can use quotes to search for an exact phrase. For example: **"***Harry Potter***"**.
- There are no stop words in Evergreen. A title search of just the terms *the and or not of* retrieves a list of titles containing those words.
- Truncation using the wildcard * to replace characters is now supported. The wildcard ? is not supported in 2.5.

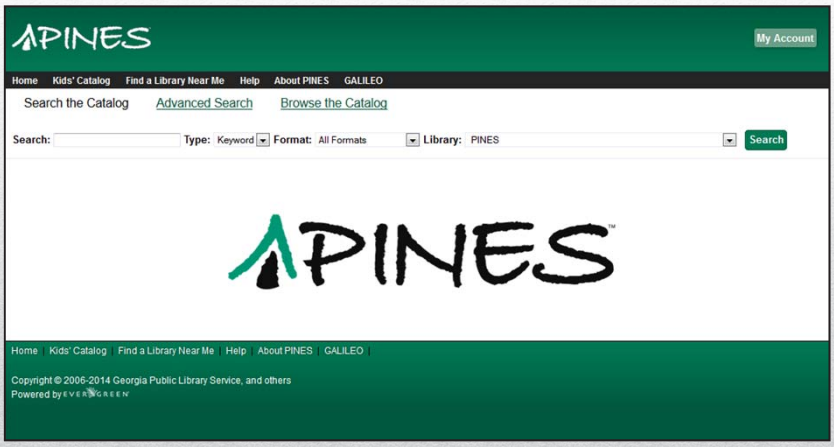
Search tips and methodology

- If a record is not coded correctly, it will not retrieve in searches as expected and will return in unexpected searches.
- If a record is coded correctly; but, not as you expect, it will not retrieve in searches as expected and will return in unexpected searches.
- Because searching is keyword, you will get results you didn't expect.
- One record for *Norton Anthology of English Literature* contains almost every word in the English language and will be in almost all search results.

Counts again –



Basic Search



Basic Search

- Keyword
  - Searches everything
  - Word order does not matter
- Title
  - Pulls from title fields (main title, alternate titles, short story titles, etc.)
  - Word order does not matter
  - *Usually* better to leave off initial articles (the, a, an)

Basic Search – Keyword versus Title

Search Type	Terms	Results	Result #
Keyword	help	9510	p. 19, #190
Title	help	5427	p. 8, #73
Title	the help	2789	p. 1, #1
Title	“the help”	57	p. 3, #25
Keyword	help stockett	13	p. 1, #1

Basic Search - Tips

Symbol	Definition	Example
*	Wildcard	teach* (searches teach, teaching, and teachers)
-	Not	teenage ninja –mutant
“”	Phrase	night life = 6059 results “night life” = 102 results

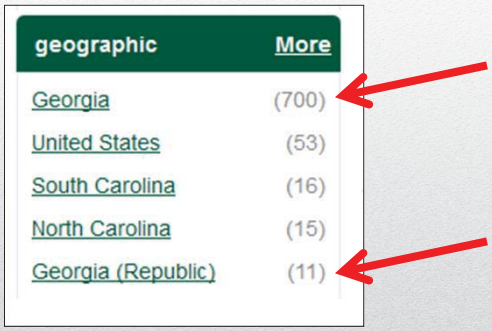
Search Result Sorting

- Relevance
- Title
- Author
- Publication Date

Facets

- Personal – Authors
- Topic – Subjects
- Series Title – Only if series fields are filled out in the MARC record
- Name – Person or organization who is a subject
- Geographic – 651 field for Geographic subject headings

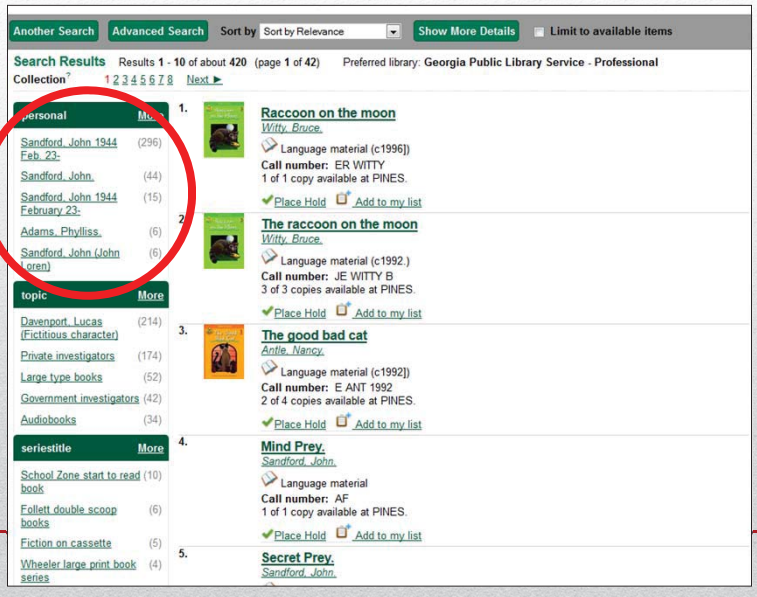
Facets



Basic Search - Author

- Author
  - Order does not matter
  - Author's "correct" name does matter
- Examples
  - Ally Condie = No
  - Allyson Condie = Yes
  - All* Condie = Yes

Two Authors with the Same Name



Basic Search - Subject

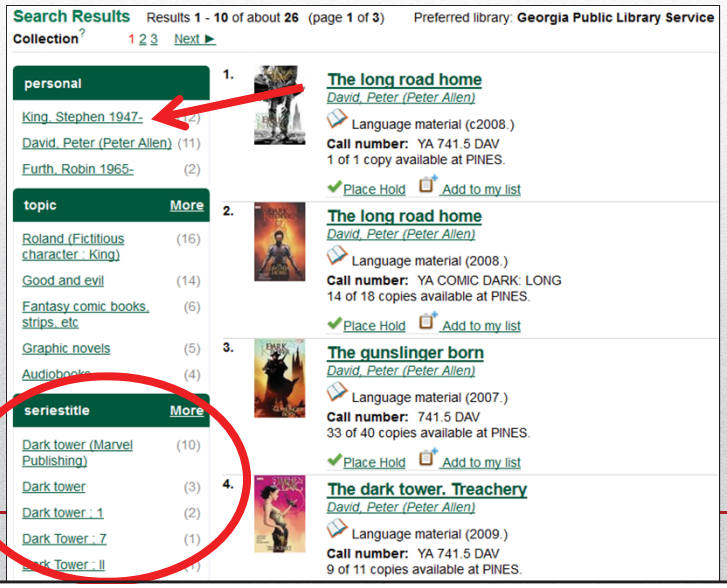
- Subject
  - Must use specific Subject Heading terminology
  - Subject Headings for children's materials may use different terms for the same thing
- Example
  - Car = juvenile materials
  - Automobiles = adult / general materials, plus some juvenile materials

Subject Headings for The Hunger Games

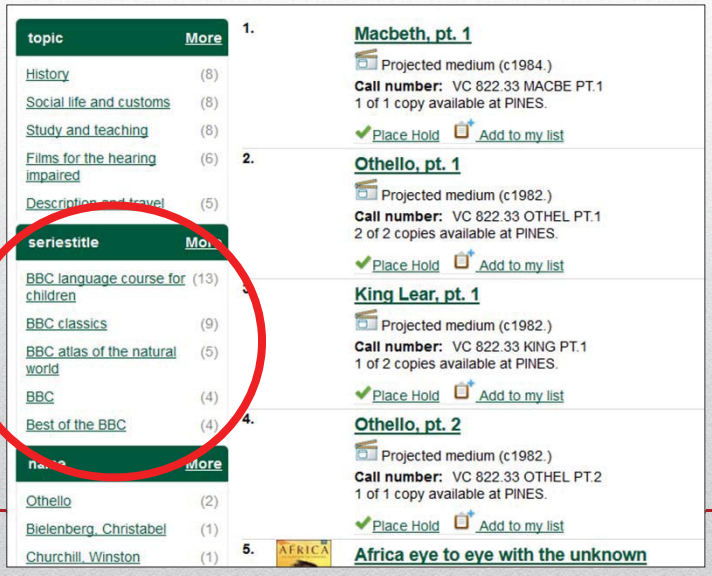
Basic Search - Series

- Series
  - Must match series name specified in the record
  - Publishers are notoriously bad about putting series titles in the books
  - Some book series don't have official titles
- Example:
  - Matched by Ally Condie = no series info in MARC record, so it doesn't find it with a series search

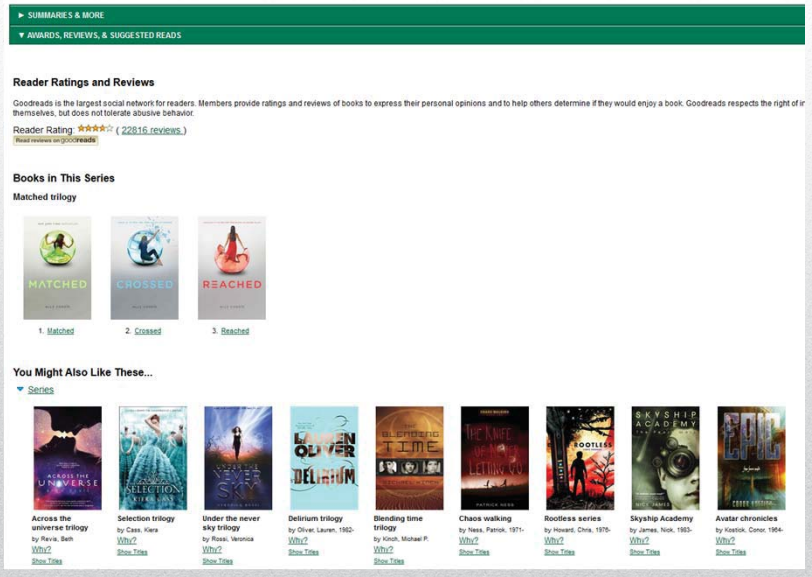
Series: Dark Tower



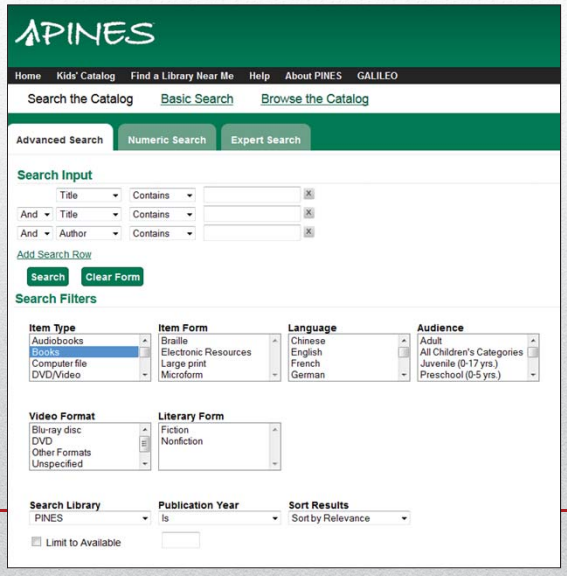
Series: BBC



Series: NoveList Select (New!)



Advanced Search



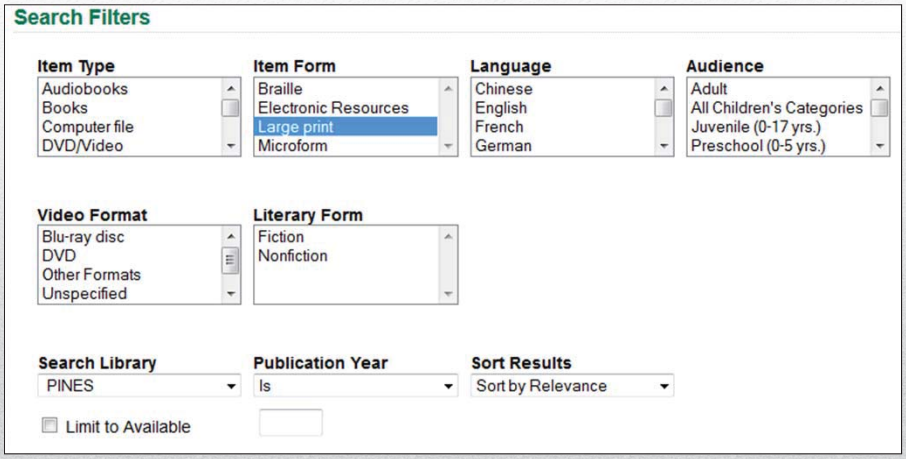
Advanced Search

- Use combinations of search types
  - Title AND Author
  - Series OR Keyword
- OR
  - Contains either of the words

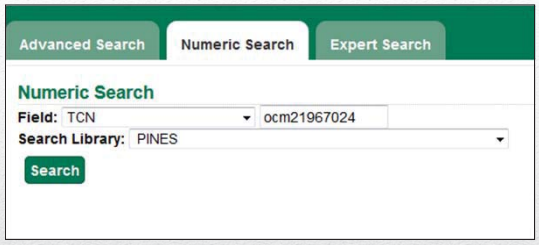
Advanced Search

Input	Description
Contains	Normal
Does Not Contain	- (minus)
Contains Phrase	“” (quotes)
Matches Exactly	Has to be exact and complete
Starts With	Has to be exact

Advanced Search - Filters



Numeric Search



- **ISBN:** International Standard Book Number
- **ISSN:** International Standard Serial Number
- **Call number browse:** Local Call Number Browse
- **LCCN:** Library of Congress Control Number
- **TCN:** Title Control Number
- **Item Barcode**

ISBN (020)

▼ MARC RECORD

```
LDR 00597cam a2200217Ia 4500
001 177630
003 GaAaGPL
005 20110526134325.0
008 900706s1990 nyu 000 0 eng d
020    ‡a 0440206707 (pbk.)
020    ‡a 9780440206705 (pbk.)
035    ‡a (OCoLC)ocm21967024
035    ‡a (OCoLC)21967024
040    ‡a JJG ‡c JJG ‡d OCLCQ ‡d BAKER ‡d BTCTA ‡d YDXCP ‡d CKL ‡d UtOrBLW
100 1  ‡a Graham, Heather. ‡0 (PINES)230631
245 1 4 ‡a The viking's woman / ‡c Heather Graham.
260    ‡a New York : ‡b Dell, ‡c c1990.
300    ‡a 469 p. ; ‡c 18 cm.
650  0 ‡a Vikings ‡v Fiction.
918  2 ‡a 177630
994    ‡a Z0 ‡b GSL
901    ‡a ocm21967024 ‡b OCoLC ‡c 177630 ‡t biblio
```

TCN (035)

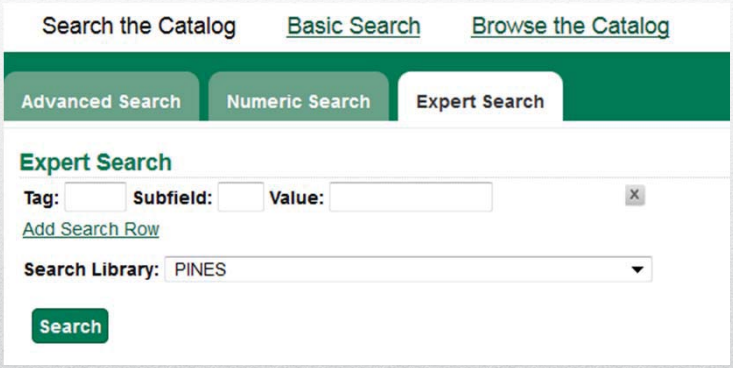
▼ MARC RECORD

```
LDR 00597cam a2200217Ia 4500
001 177630
003 GaAaGPL
005 20110526134325.0
008 900706s1990 nyu 000 0 eng d
020    ‡a 0440206707 (pbk.)
020    ‡a 9780440206705 (pbk.)
035    ‡a (OCoLC)ocm21967024
035    ‡a (OCoLC)21967024
040    ‡a JJG ‡c JJG ‡d OCLCQ ‡d BAKER ‡d BTCTA ‡d YDXCP ‡d CKL ‡d UtOrBLW
100 1  ‡a Graham, Heather. ‡0 (PINES)230631
245 1 4 ‡a The viking's woman / ‡c Heather Graham.
260    ‡a New York : ‡b Dell, ‡c c1990.
300    ‡a 469 p. ; ‡c 18 cm.
650  0 ‡a Vikings ‡v Fiction.
918  2 ‡a 177630
994    ‡a Z0 ‡b GSL
901    ‡a ocm21967024 ‡b OCoLC ‡c 177630 ‡t biblio
```

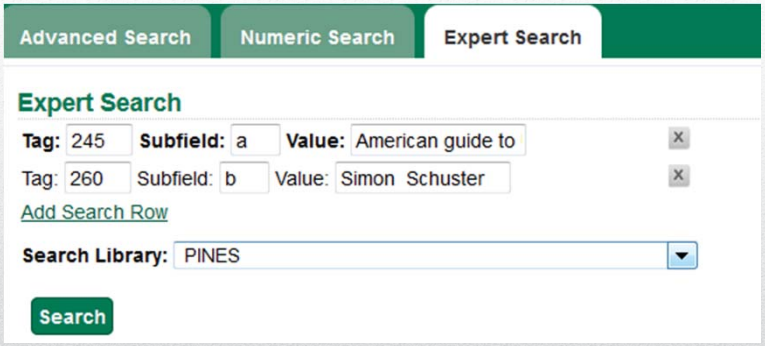
Call Number (Shelf Browse)

- Works best with single branch
- Need to know call number format
  - Does it start with J or NON FIC or MYS or BIO or….?
  - Do the Non-Fiction books start with the number or do they start with NF or NON FIC or … ?

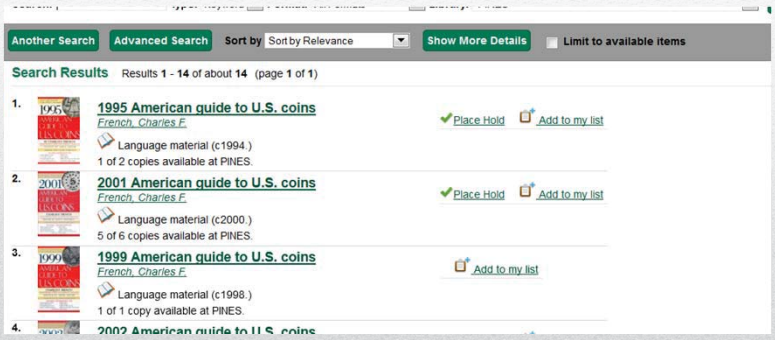
Expert searching



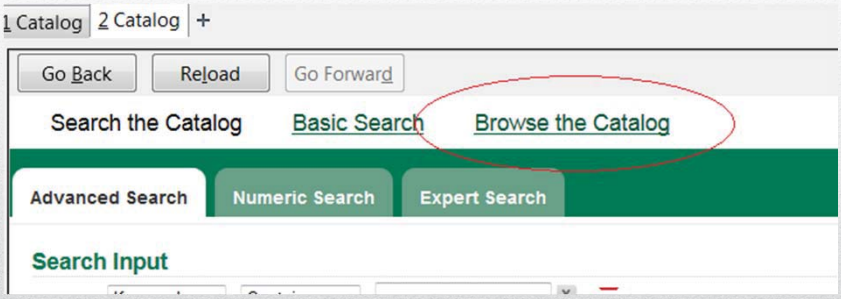
Expert searching



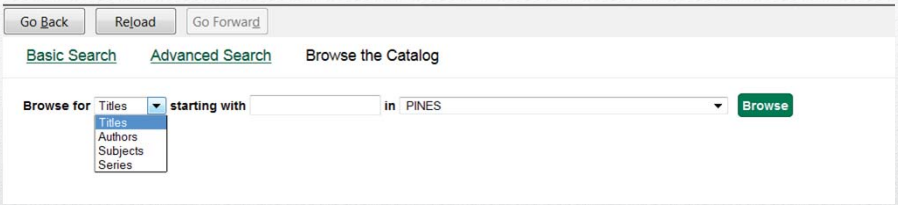
Expert searching



Browse searching



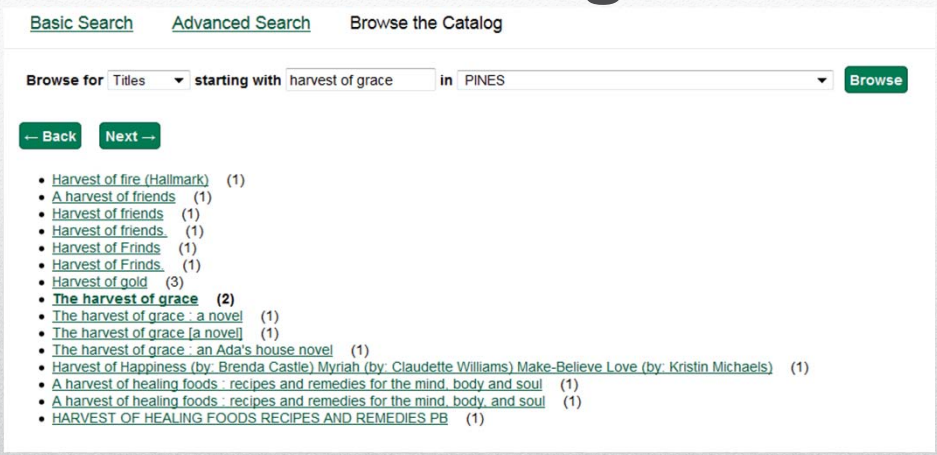
Browse searching



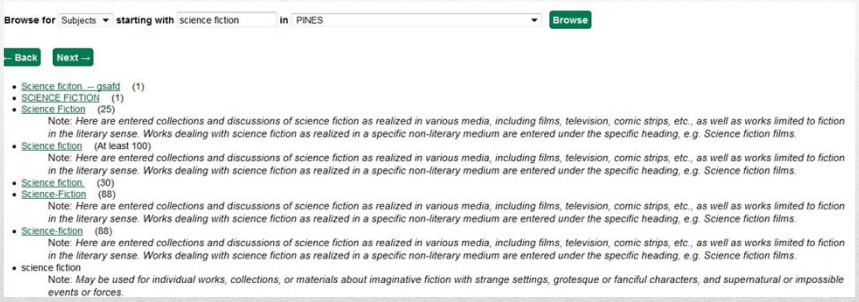
Searches:

- Titles
- Authors
- Subjects
- Series

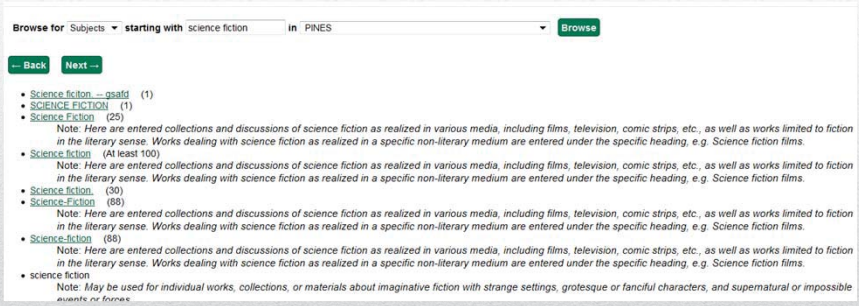
Browse searching



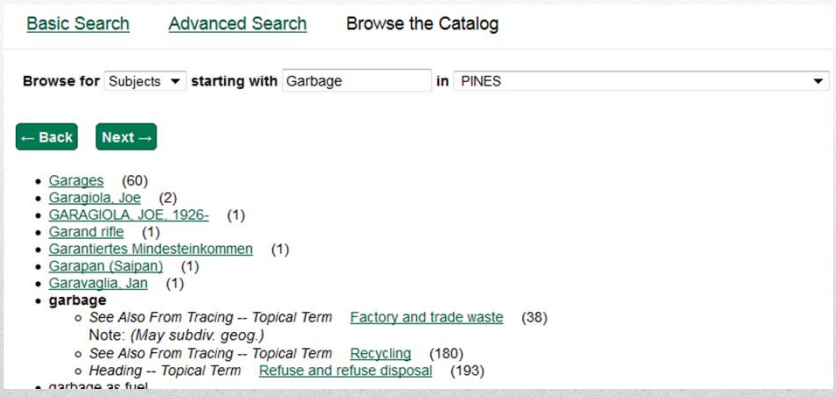
Browse searching



Browse searching

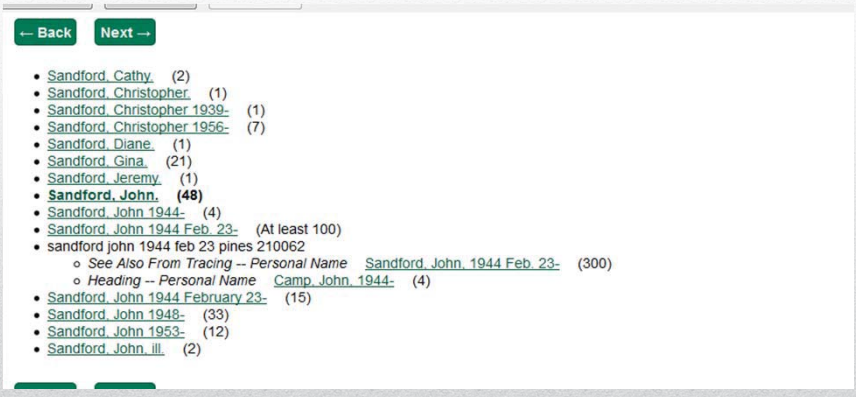


Browse searching



Browse searching

Browse searching



Problem searches? Questions?