



SAN FRANCISCO

# Sierra Search Strategies

Gem Stone-Logan High Plains Library District



## **Focus**

Using the Search/Hold function

# Sierra Search Strategies Agenda

- Record Number and Phrase Searching
- Keyword Searching
  - -Segments
  - -Wildcards
  - -Boolean operators
  - –Adjacency/PhraseSearching

- Facets
- Limits
- Range Searching
- Browse Query
- Troubleshooting

## **Background**

High Plains Library District

- Public library system
- Migrated to Sierra, from Horizon, in November 2014
- Current Sierra Version 1.2.3
- Around 80,000 patrons have used us within the last year
- Collection contains around 370,500 Bibs
- Approximately 13 locations that lend physical items
- We primarily use Graphical Browse

## **Caveats**

- Testing based on Sierra 1.2.3 search bugs differ depending on version
- In addition to testing, it's based on my interpretation of the manuals.
- •Each library system is going to have unique customizations that may not be appropriate for another system.
- •I like to learn new tips. Please tell me if I'm wrong or when there's a better approach.

## Search/Hold



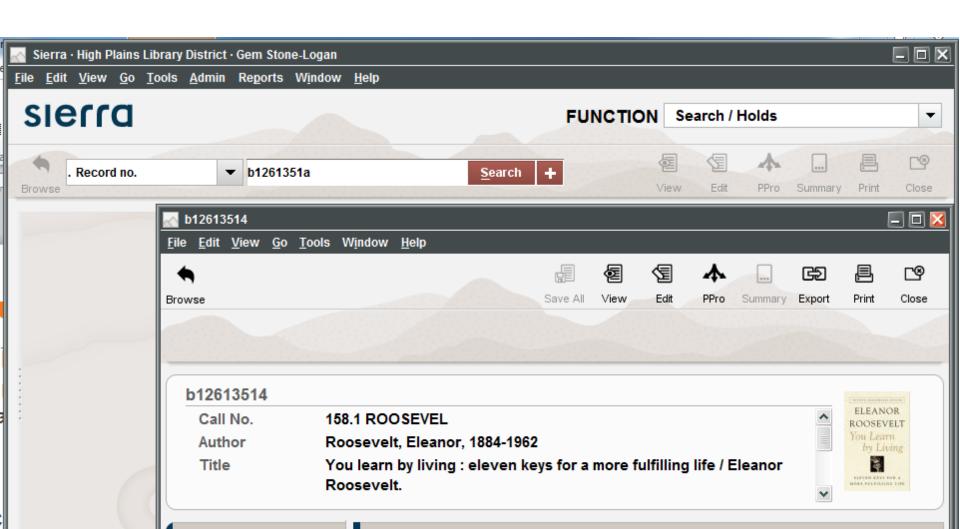
TIP: After choosing the Search/Hold function, type the index tag to quickly choose an index and move to the search box.

#### **Record Number**

- Record numbers start with a character and end with a check digit.
- •The first character indicates the type of record. Examples:
  - -b: bibliographic
  - -o: order
  - -i: item
  - –j: volume

#### **Record Number Wildcard**

- "a" is a wildcard that can replace a record number's check digit
  - -b12613514 and b1261351a will retrieve the same record



#### **Phrase Search**

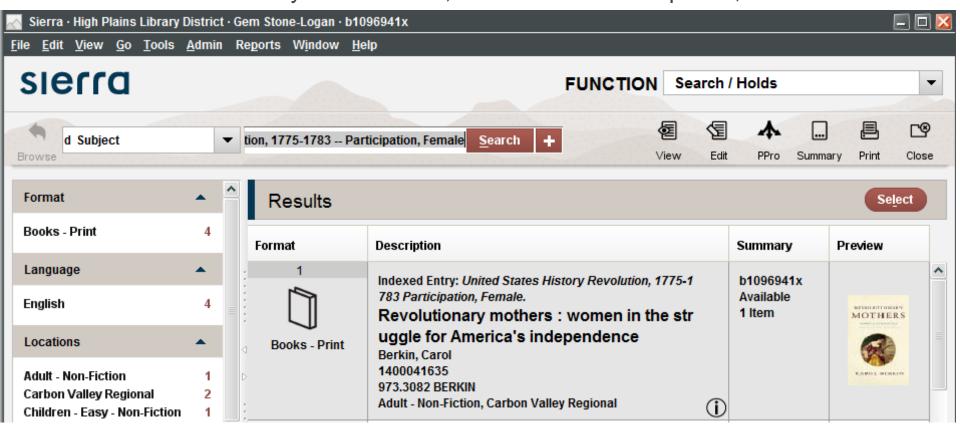
- Returns alphabetical list
  - -Title
  - –Author (Last Name, First Name)
  - -Subject
  - -Etc.
- Strips out initial articles

#### Phrase Search: Rotated Subject Headings

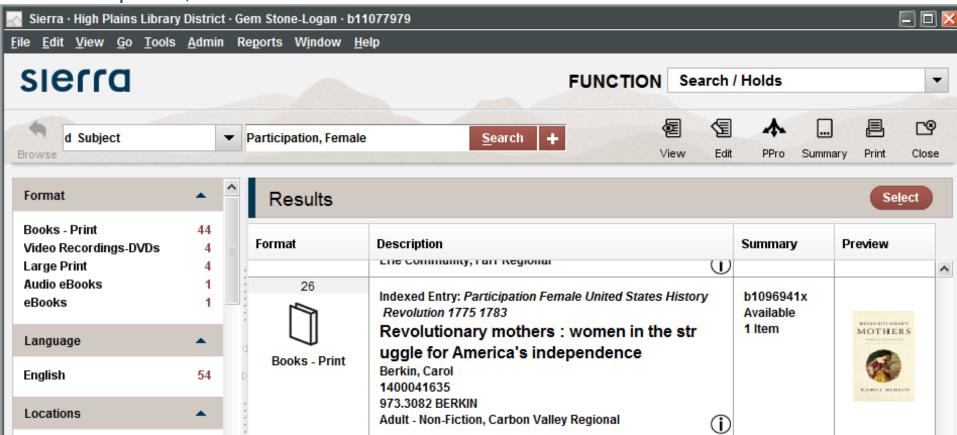
- Allows phrase searching of most subdivisions
- Excludes
  - -subdivisions that start with a number
  - -"common" subheadings

http://csdirect.iii.com/sierrahelp/Default.htm#sgil/sgil\_search\_indexes\_heading.html#subject%20subdivisions%20not%20rotated

#### United States -- History -- Revolution, 1775-1783 -- Participation, Female



#### Participation, Female



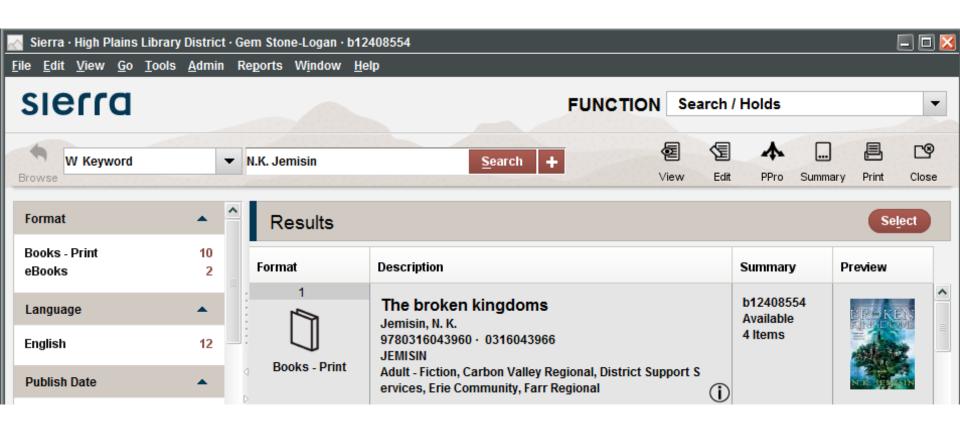
#### Phrase Search: Rotated Subject Headings

Search for "History"

HISTORY, Local Pennsylvania Sources	1
History, Local Pennsylvania Sources Bibliography	1
Phillips County (Colo.) History, Local.	1
History, Local Pitkin County (Colo)	1
History, Local Prairies Colorado	1
History, Local Ranch life Colorado Boulder County	1
History, Local Rocky Mountain National Park (Colo)	1
Rocky Mountains History, Local.	2
History, Local Rocky Mountains Pictorial works	1
History, Local San Juan Mountains (Colo and NM)	2
San Luis Valley (Colo. and N.M.) History, Local.	1
History, Local Sangre de Cristo Mountains (Colo and NM)	1
History, Local Severance (Colo)	1
History, Local Sheyenne River Region (ND)	1
Siberia (Russia) History, Local.	1
Silk Road History, Local.	1
History, Local South America Juvenile literature	1
History, Local South Carolina	1
Southern States History, Local.	2
Southern States History, Local Juvenile literature.	1
Southwest, New History, Local.	4
Southwestern States History, Local.	1
Spain History, Local.	1
Superior, Lake History, Local.	1
History, Local Teller County (Colo)	1
Tuscany (Italy) History, Local.	1

### **Keyword Search: Basic**

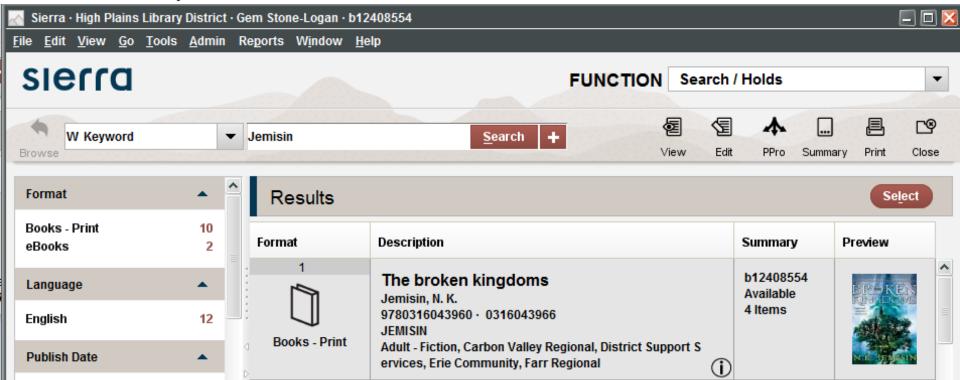
- Words can be entered in any order
- No spell check
- Don't use the following as search terms, even if included in the title
  - **—**?
  - -NOT



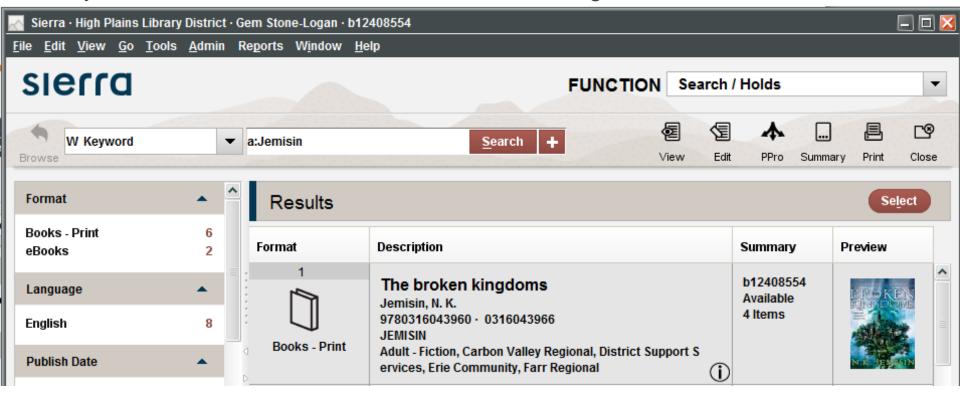
# **Keyword Search: Advanced Word Search Index Segments**

- a: author does not retrieve authors in notes field
- •t: title includes short story titles
- •d: subject includes subjects and genres
- •n: note include note fields

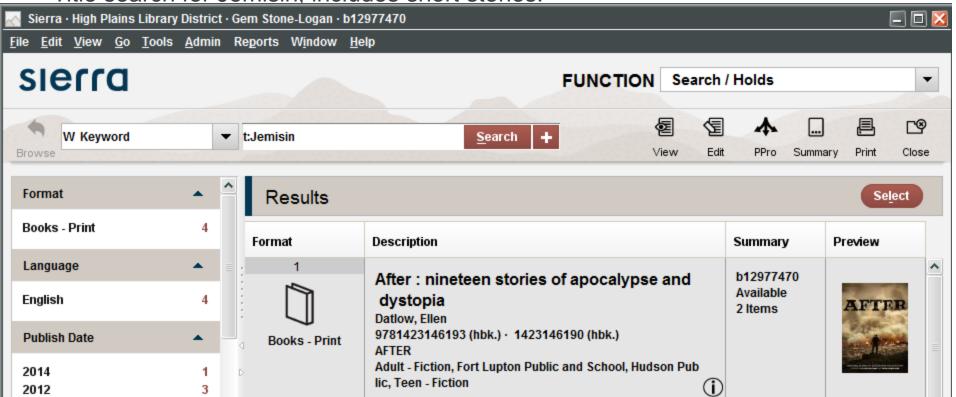
#### General Keyword search for Jemisin



Keyword search for Jemisin restricted to Author segment.

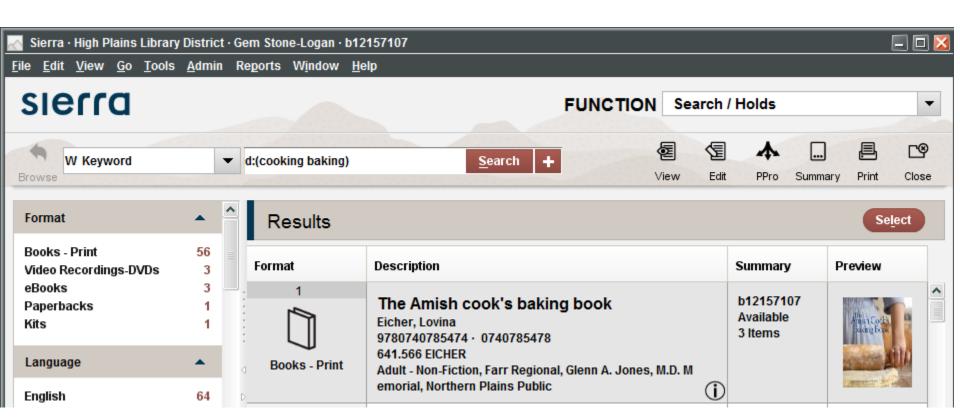


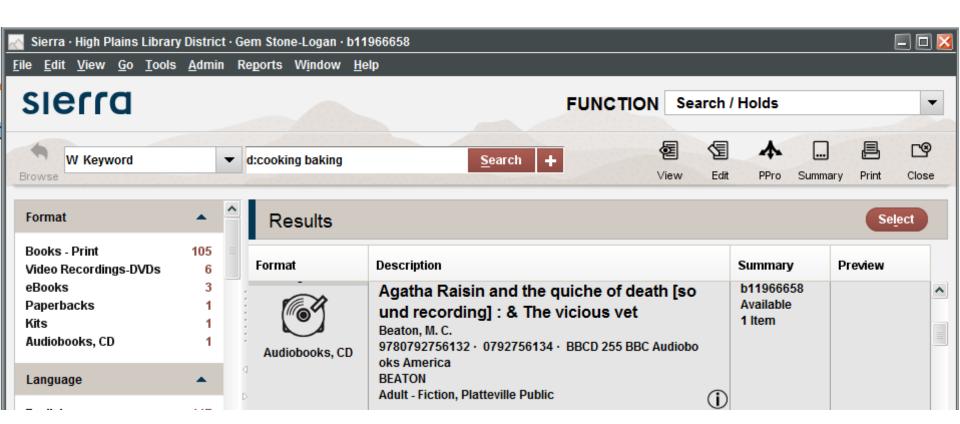
Title search for Jemisin, includes short stories.



### **Keyword Search: Multiple Words**

When using segments, multiple words should be enclosed in parenthesis or quotes

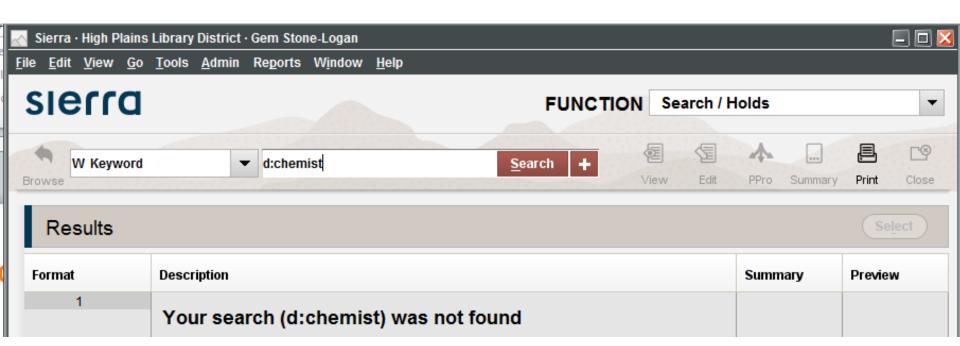


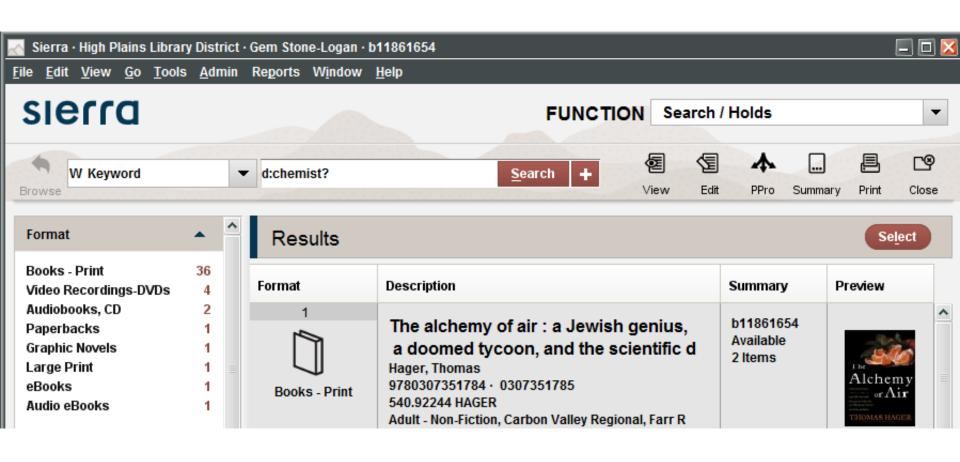


### **Keyword Search: Wildcards**

\* Multi-character wildcard (matches zero or more characters)

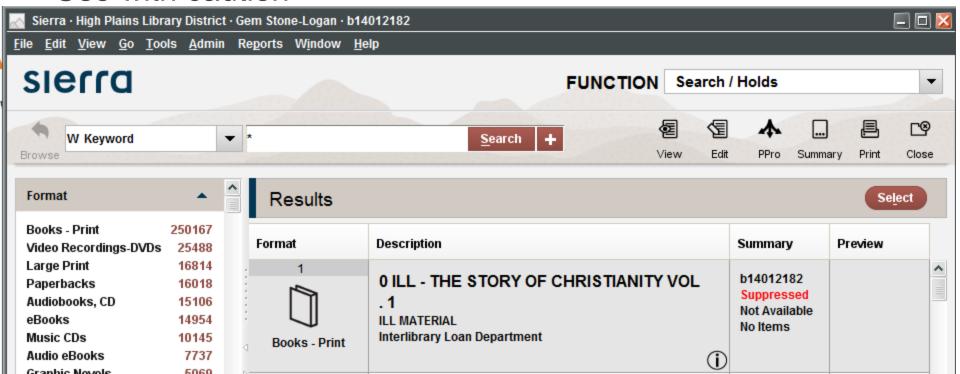
? Single-character wildcard (matches exactly one character)







#### Use with caution



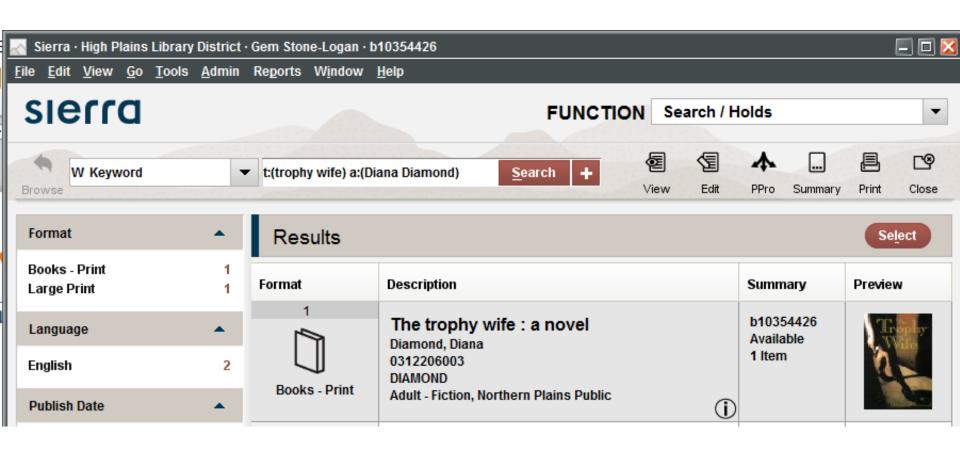
### **Keyword Search: Boolean Operators**

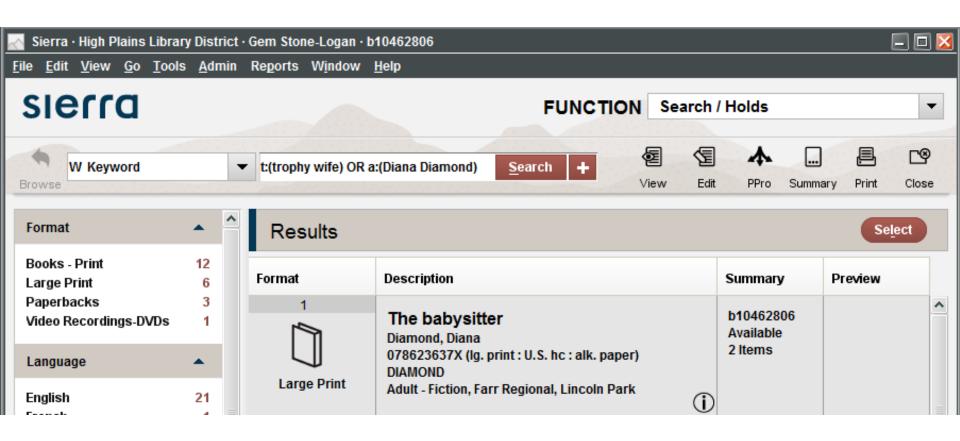
- •AND (default)
- •OR
- NOT
- •Former Horizon libraries, no XOR option ©
- Using Parentheses

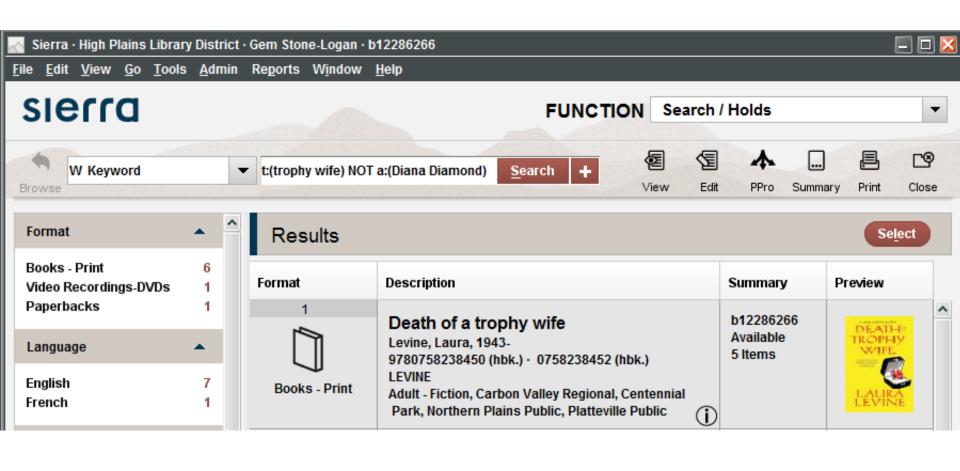
#### **Keyword Search: Boolean Operators: AND**

Equivalent:

```
t:(trophy wife) a:(Diana Diamond)
or
t:(trophy wife) AND a:(Diana Diamond)
```







## **Keyword Search: Boolean Operators: Caveats**

The Sierra manual claims &, |, and ! can be used instead of AND, OR, and NOT. However, testing shows inconsistent results when using the symbols so I recommend sticking to the words.

Sierra's Boolean operators are case insensitive but Encore's are not. Stick to all uppercase for consistency.

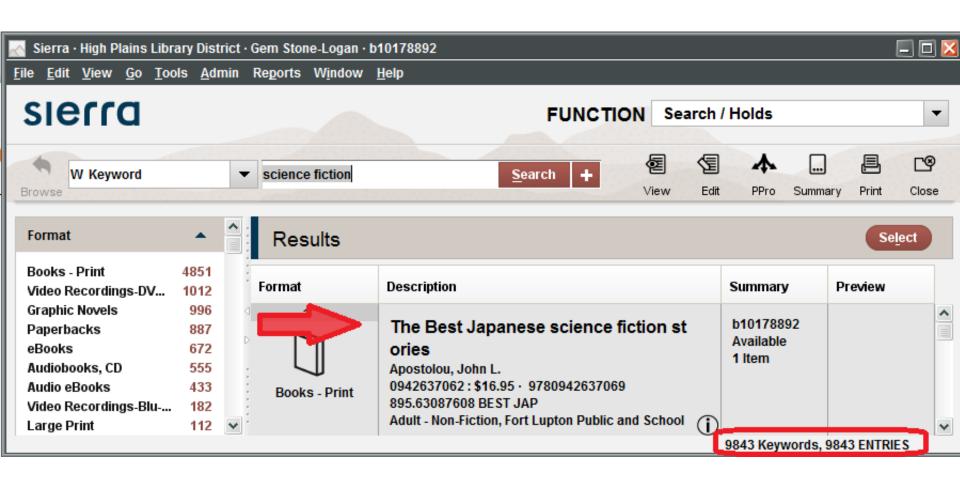
## **Keyword Search: Boolean Operators: Caveats**

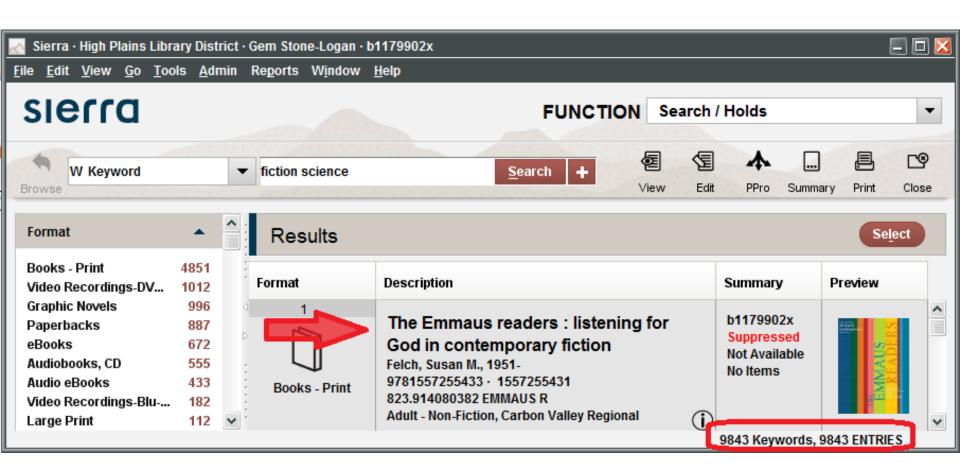
Searching for Size 12 is Not Fat by Meg Cabot

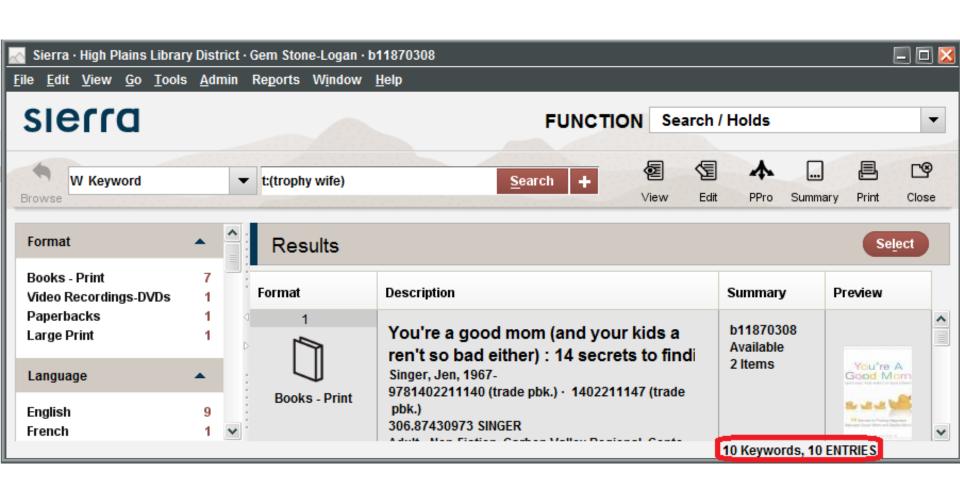
- •Size 12 Is Not Fat (Excludes titles with the word fat)
- "Size 12 Is Not Fat" (Excludes titles with the word fat)
- Size 12 Is "Not" Fat (Works)
- •Size 12 Is Fat (Works)

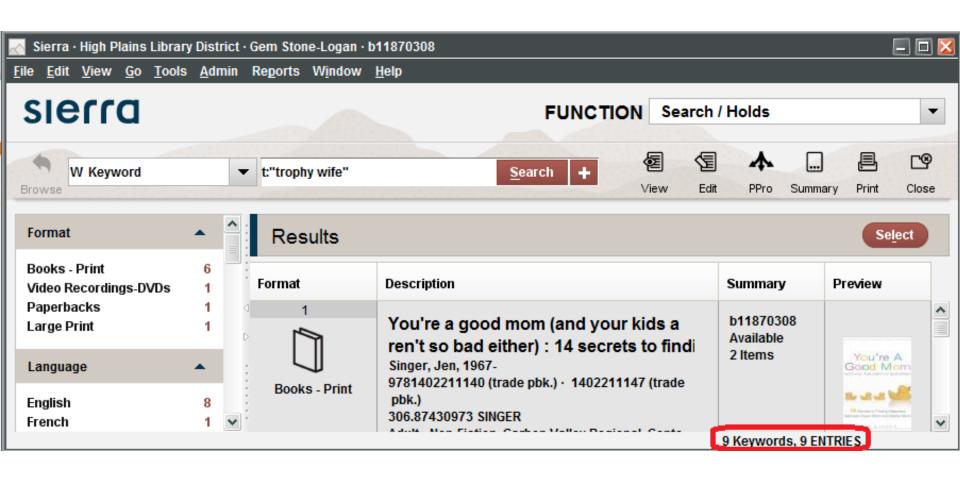
## Keyword Search: Adjacency/Phrase Searching

- By default, word order does not matter for which records are retrieved but it may change the sort order
- Force order to matter by enclosing search terms in quotation marks ""









# **Keyword Search: Proximity Searching**

- Use a ~ to indicate the maximum allowable number of words between the two specified search terms.
- Order matters
- •t:"love harp"~2 OR t:"harp love"~2

•t:"love harp"~2 OR t:"harp love"~2 Sierra · High Plains Library District · Gem Stone-Logan · b12229957 Edit View Go Tools Admin Reports Window Help sierra FUNCTION Search / Holds 包 t:"love harp"~2 OR t:"harp love"~2 W Keyword Search Edit PPro Summary Browse Format Results Select Books - Print Format Description Summary Preview Language b12229957 Something is out there: stori Available English es 2 Items Bausch, Richard, 1945-9780307266279 · 0307266273 **Publish Date** Books - Print BAUSCH

Adult - Fiction, Erie Community, Farr Reg

ional

2010

# **Keyword Search: Proximity Searching**

Something is out there: stories, by Richard Bausch

Notes: The harp department in love -- Byron the Lyron -- Reverend Thornhill's wife -- Son and heir -- Trophy -- Something is out there -- Blood -- Overcast -- One hour in the history of love -- Immigration -- Sixty-five million years.

### **Phrase and Keyword Facets**

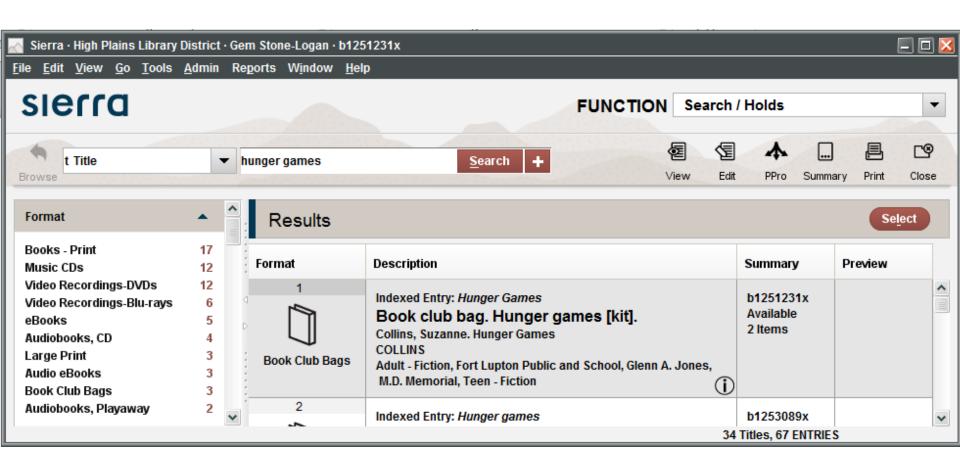
- Facets different depending on the search index
- The Phrase Facet is the only one not available for keyword results
- Compact browse does not have a phrase facet

# **Phrase and Keyword Facets**

	Phrase Phrase	Keyword
Format	Yes	Yes
Language	Yes	Yes
Publish Date	No	Yes
Collections	No	Yes
Locations	Yes	Yes
Found In	No	Yes
Available at Library	Yes	Yes
Place	No	Yes
Phrase	Yes (except compact browse)	No

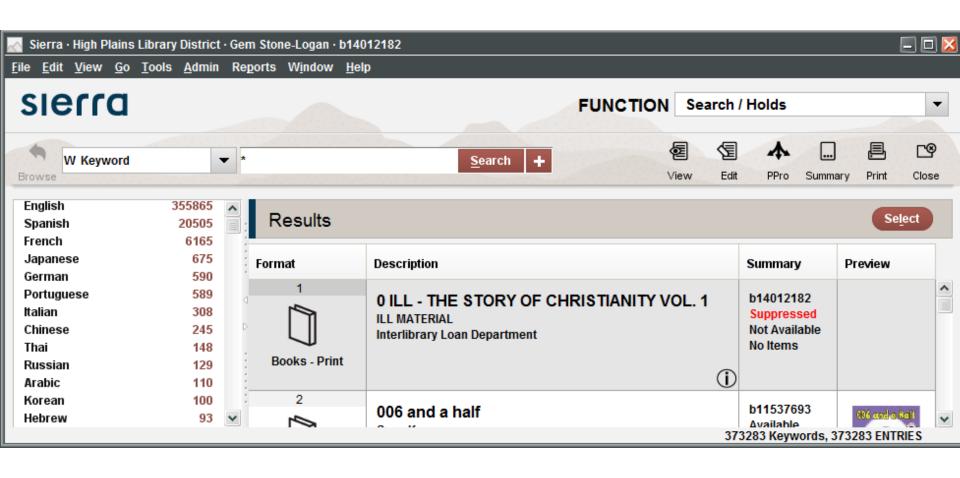
#### **Facets: Format**

- Available with both Phrase and Keyword Indexes
- Title: Hunger Games; Facet: Video Recordings -DVDs



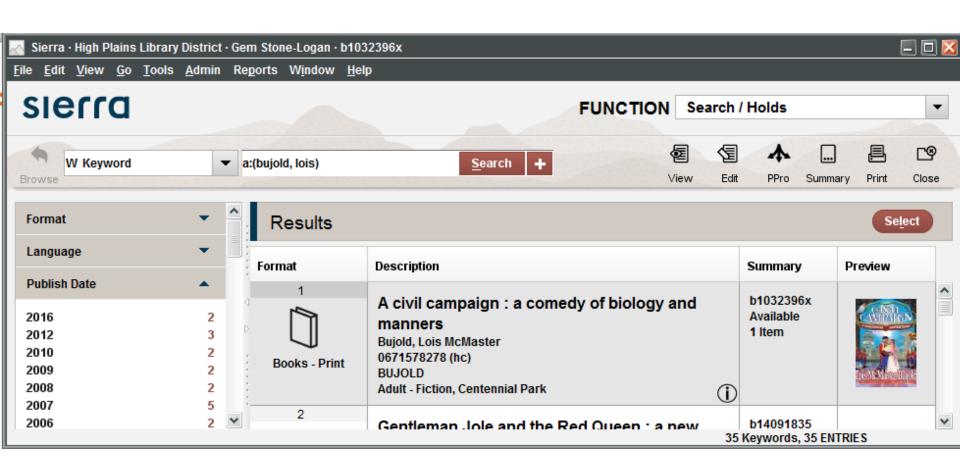
### **Facets: Language**

- Available with both Phrase and Keyword Indexes
- At HPLD doesn't include subtitles
- Keyword: \*; Facet: Chinese



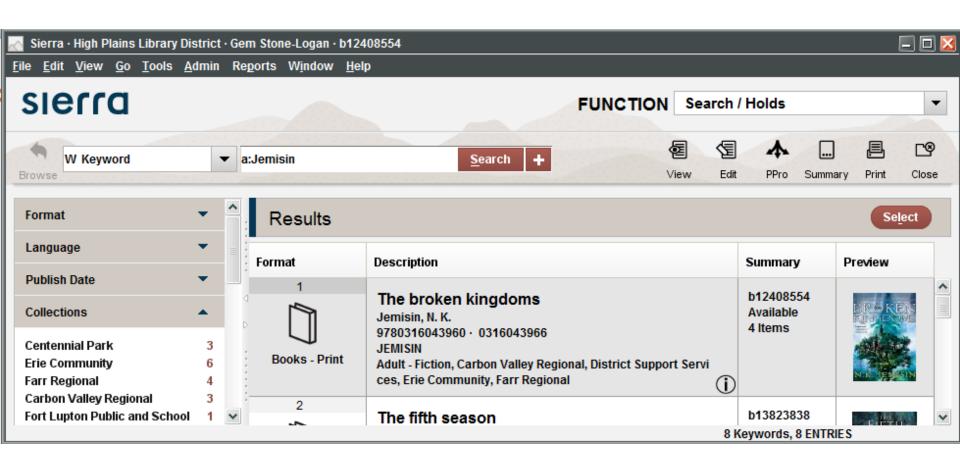
#### **Facets: Publish Date**

- Available only in the Keyword Index
- •Keyword: a:(Bujold, Lois) Facet:2012



#### **Facets: Collections**

- Available only in the Keyword Index
- •HPLD Physical Library Locations
- Keyword: a:Jemisin Facet: Erie Community



#### **Facets: Locations**

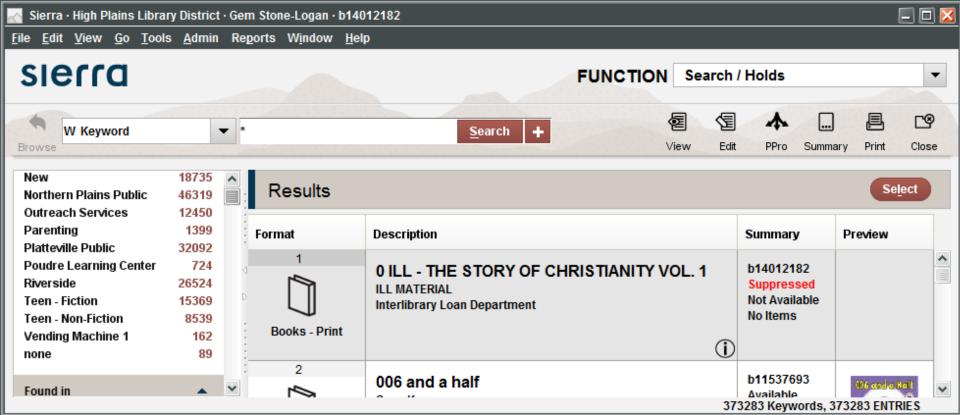
- Available with both Phrase and Keyword Indexes
- HPLD Customized

# **Facets: HPLD Specific Locations**

- Adult-Fiction
- Adult-Non-Fiction
- Children-Easy-Fiction
- Children-Easy-Non-Fiction
- Children-Easy Readers

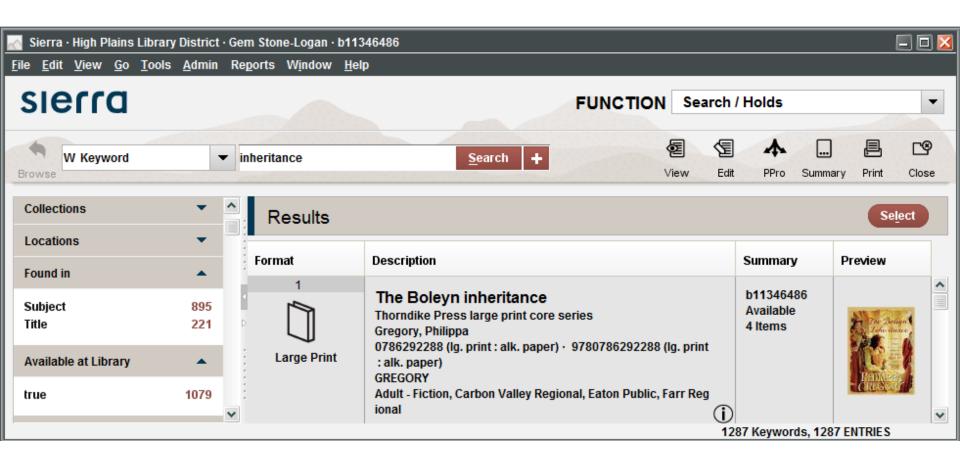
- Children-Juvenile-Fiction
- Children-Juvenile-Non-Fiction
- Literacy
- New
- Parenting
- Teen-Fiction
- Teen-Non-Fiction

Keyword: \* Facet: Parenting



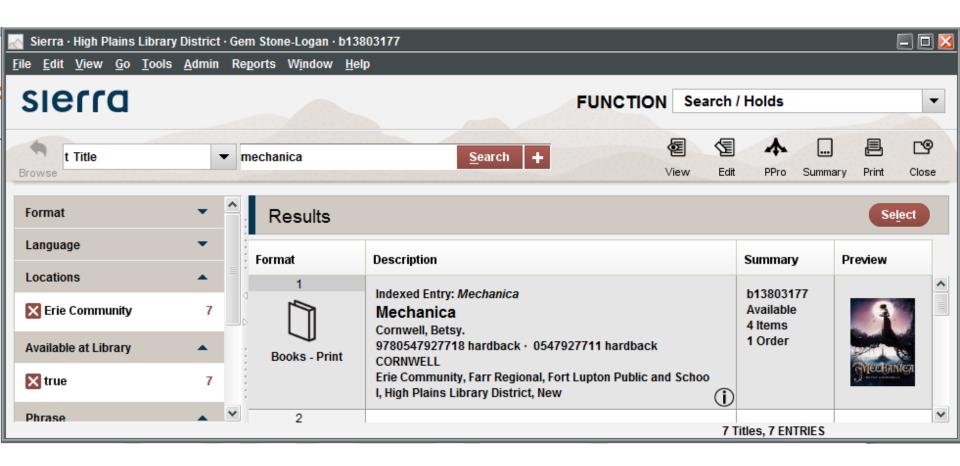
#### **Facets: Found In**

- Available only in the Keyword Index
- Narrow your search without having to remember keyword segment tags.
- Works for Title, Author, and Subject
- •Keyword: inheritance; Facet: Title



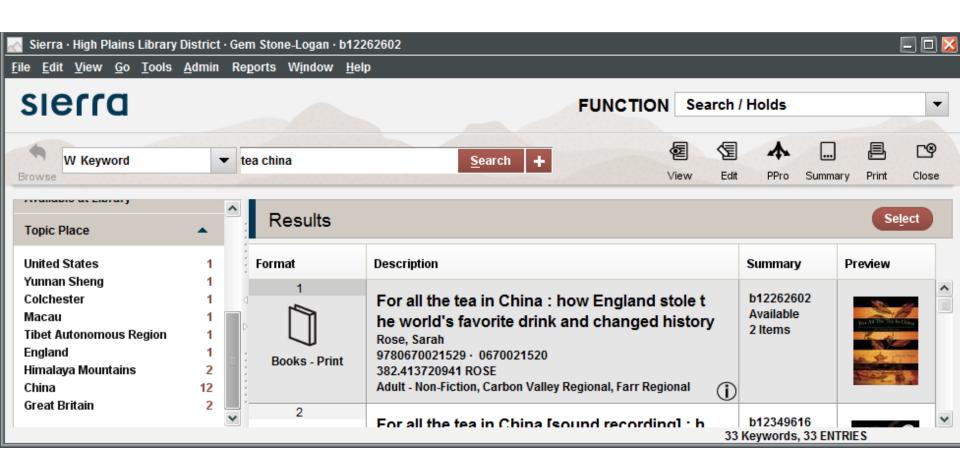
### **Facets: Available at the Library**

- Available with both Phrase and Keyword Indexes
- An item is available if it:
  - -Is not suppressed
  - -Is not checked out
  - –Does not have a hold
  - Additional library qualifiers setup by III
- Can't limit to titles available at a specific location
- •Title: Mechanica; Facet: true; Facet: Erie Community



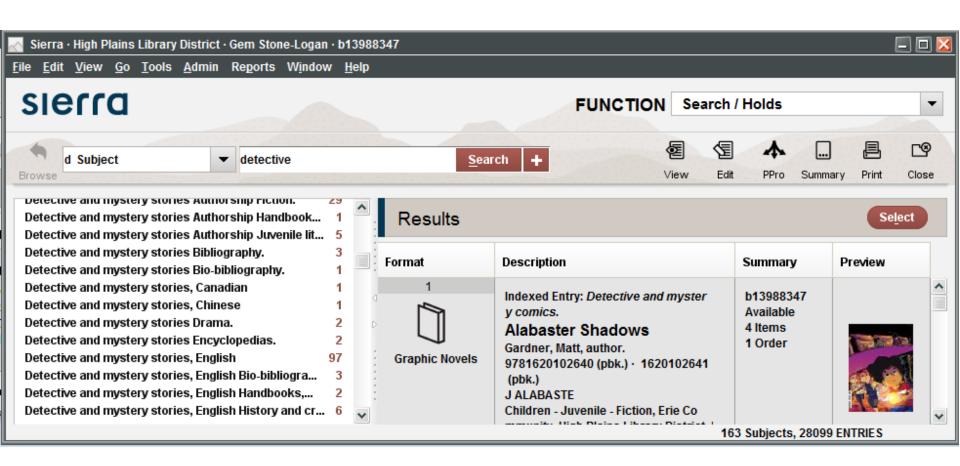
### **Facets: Place**

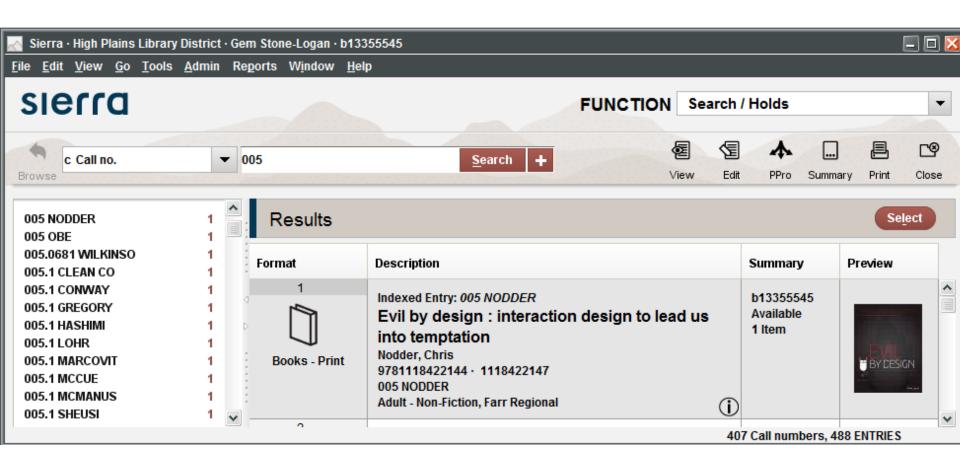
- Available only in the Keyword Index
- •Keyword: tea china; Facet: Great Britain



#### **Facets: Phrase**

- Available only in the Phrase Indexes
- Not available in Compact Browse
- Varies depending on the index
- Subject: detective; Facet: Detective and mystery stories, Chinese
- Call no.: 005; Facet: 005.1 Clean Co





## **Browse Searching with Limits**

- Buggy for some Sierra versions
- Differences between phrase and keyword limits
- Limit tags

## **Bugs**

- Keyword search by publisher limit hangs Resolved 2.0.1
- "Apply limit to all searches" selection is not retained for entire Sierra session – Resolved 1.2.2 and 2.0.1
- Limiting does not work in Search/Holds function after switching functions - Resolved 2.0.2

# **Opening the Limit Window**

- •+
- Tools -> Limit
- •ctrl+shift+l

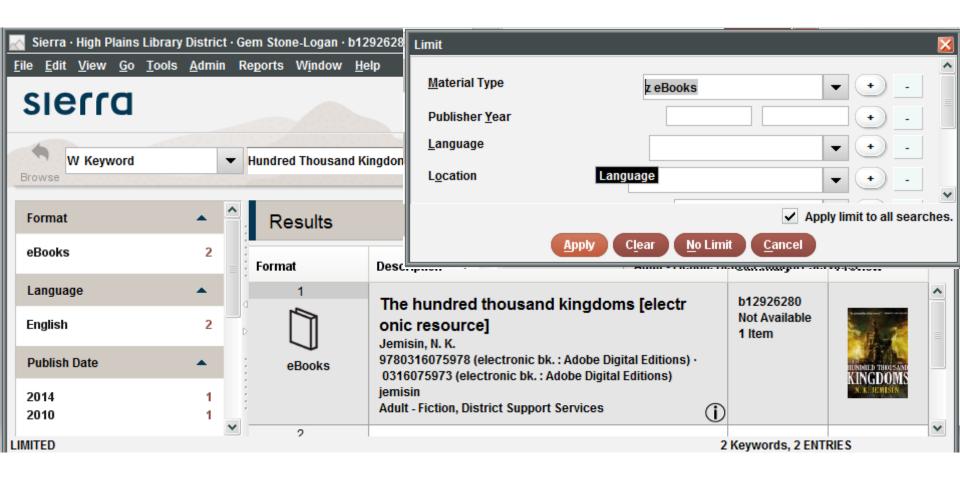


### Limiting a Search

- Choose index
- Enter search term
- Open limit window
- Select/enter limits
- Click "Apply Limit to all searches" (if switching function bug)
- Apply
- Click Search

### **Basic Example Type**

- •Title: Hundred Thousand Kingdoms
- Material Type Limit: z



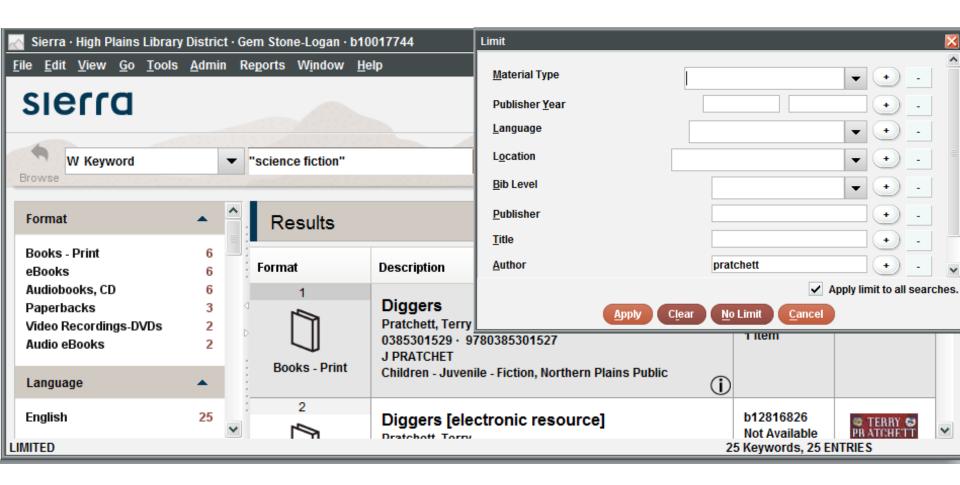
### **Clear Limits**

- Open up limit box
- Click Clear
- Click No Limit



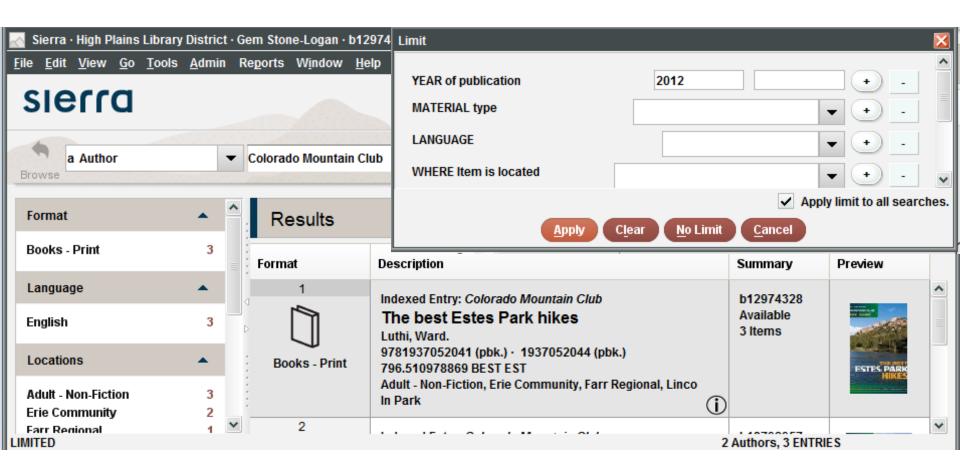
## Same Limits for Phrase and Keyword

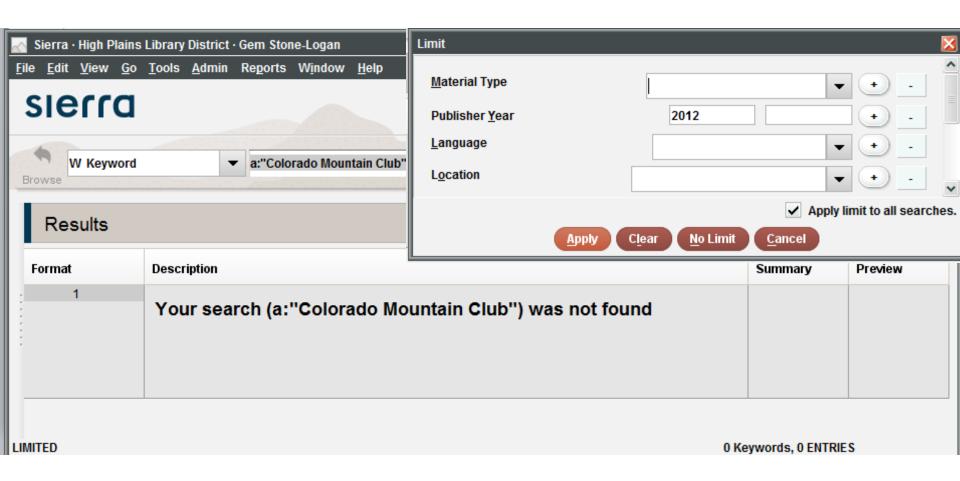
- Title
- Author
- Subject
- Material Type
- •Example: Keyword: "science fiction"; Author Limit: Pratchett

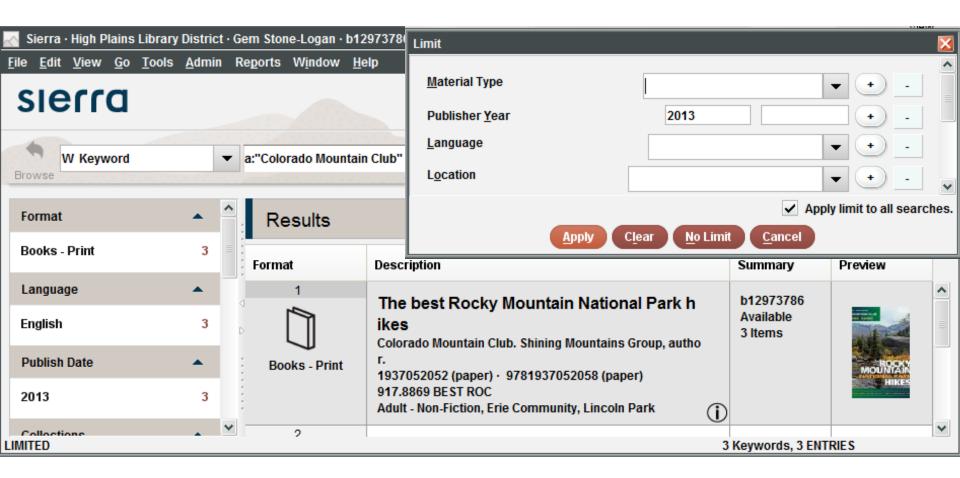


#### Year of Publication vs. Publisher Year

- Look the same but act differently
- Both searches inclusive when start and end dates are entered
- Both act the same when only end dates entered
- Year of Publication's start date: greater or equal
- Publisher Year: only equal
- Author: Colorado Mountain Club
- •Limit to 2012

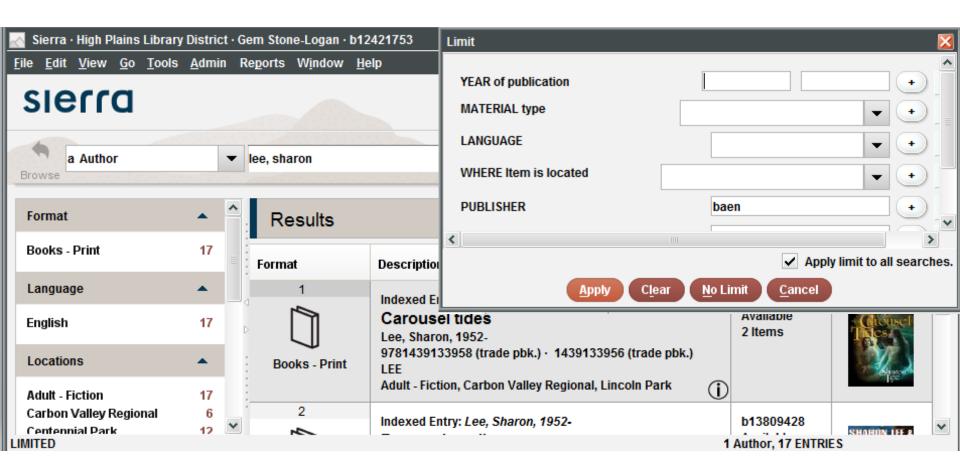






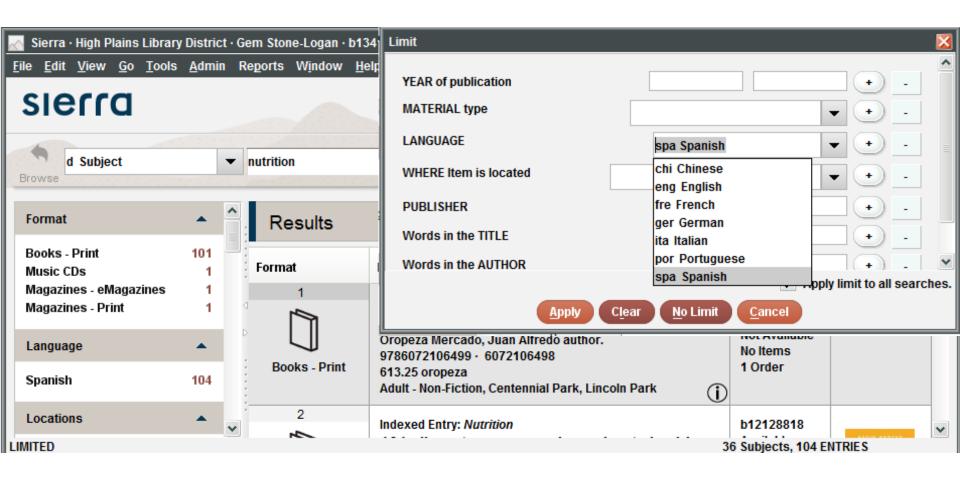
#### **Publisher**

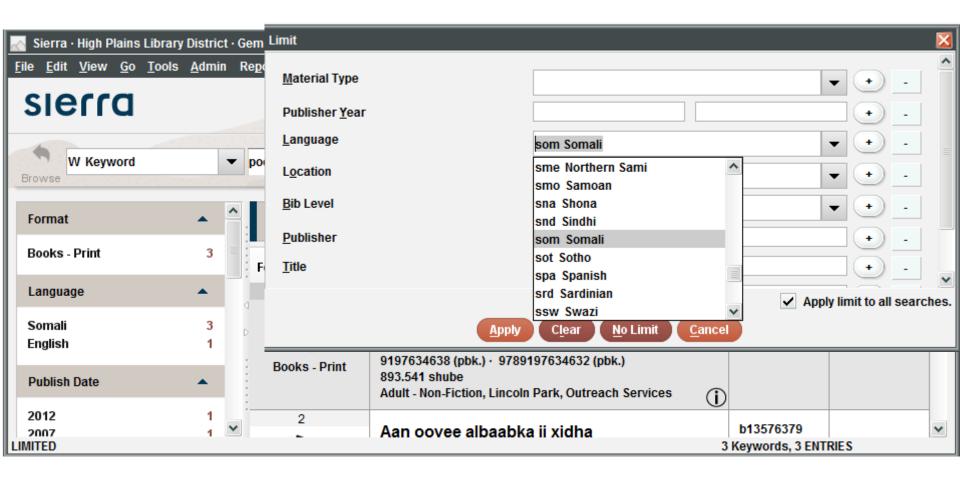
- •Broken in Keyword Index (Resolved 2.0.1)
- Author: Lee, Sharon; Publisher: Baen



## Language

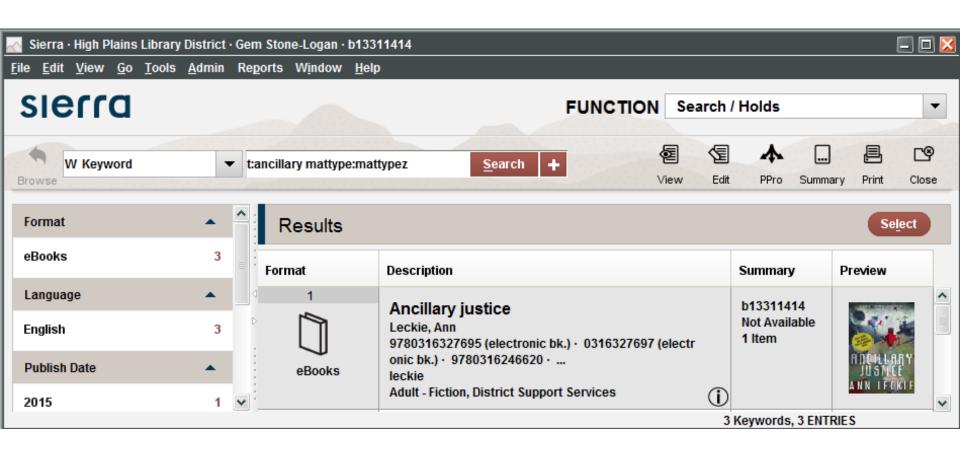
- Works differently in Phrase vs Keyword Indexes
- Subject: nutrition Facet: Spanish
- Keyword: d:poems Facet:som

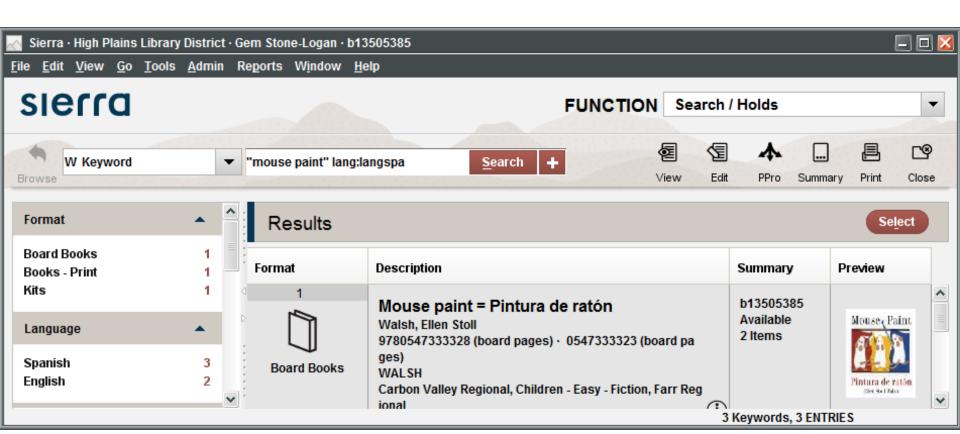


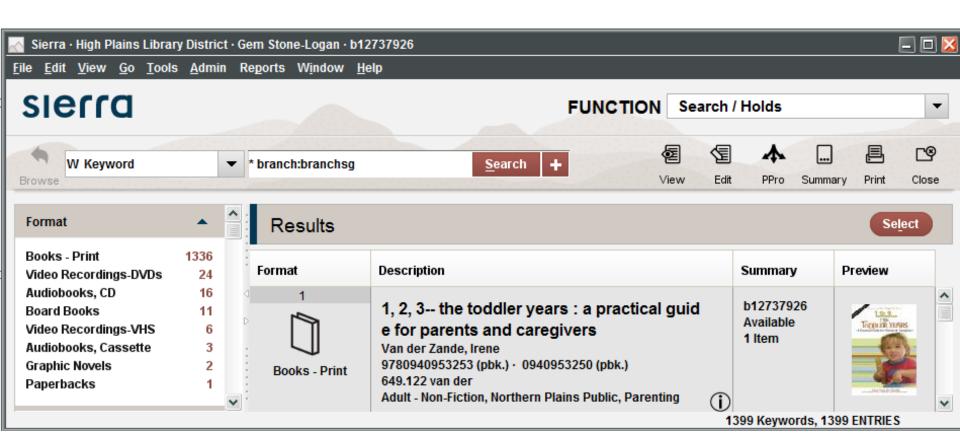


## **Limiting by Tag**

- Only available in the keyword index
- Three limit options:
  - -mattype:mattype
  - -lang:lang
  - -branch:branch
- •Examples:
  - -Keyword: t:ancillary mattype:mattypez
  - -Keyword: "mouse paint" lang:langspa
  - –Keyword: \* branch:branchsg





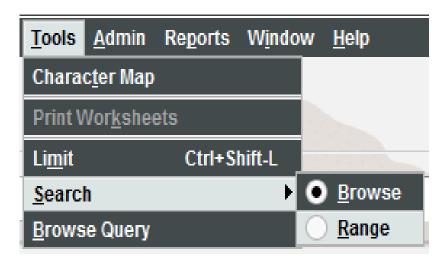


# **Range Searching**

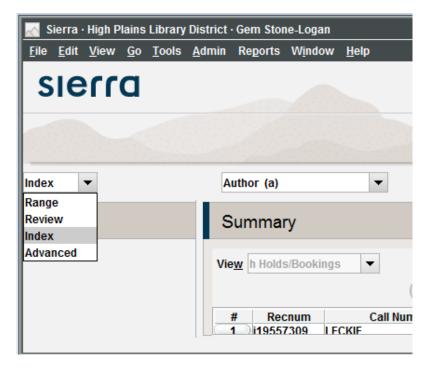
Displays record results one-by-one

- Range
- Review
- Index
- Advanced

# **Range Searching**

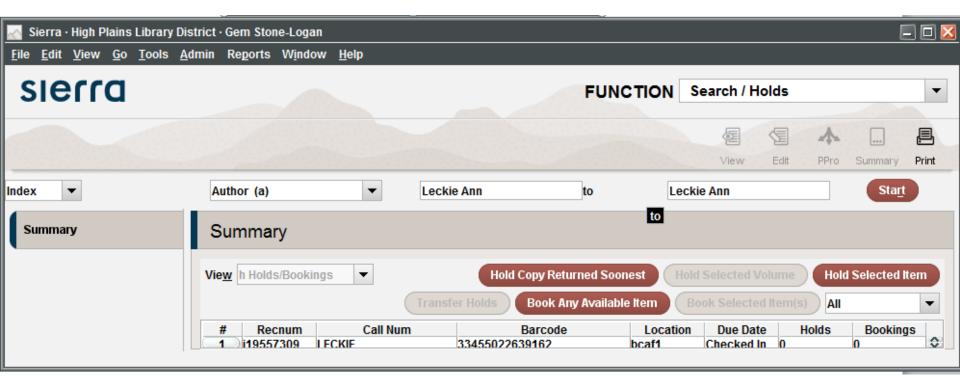


# **Range Searching**



## Range Searching: Index

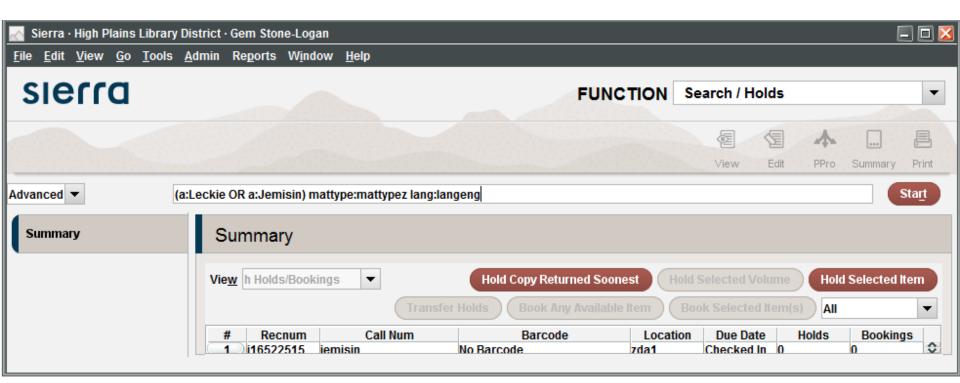
- Enter start and stop information
- Author do not use a comma between the last and first name
- •Call No. Works like a "starts with" search. 003 retrieves 003, 003.54, 003.857, etc
- Subject Like Author, leave out punctuation



### Range Searching: Advanced

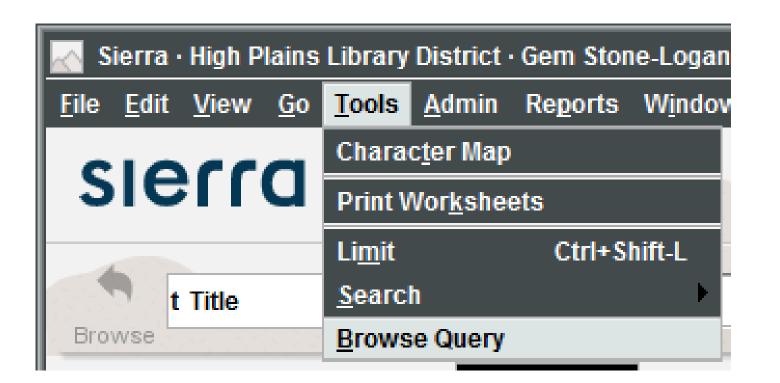
- Uses the same syntax as for Keyword searches including Boolean operators and wildcards
- •Example search:

(a:Leckie OR a:Jemisin) mattype:mattypez lang:langeng

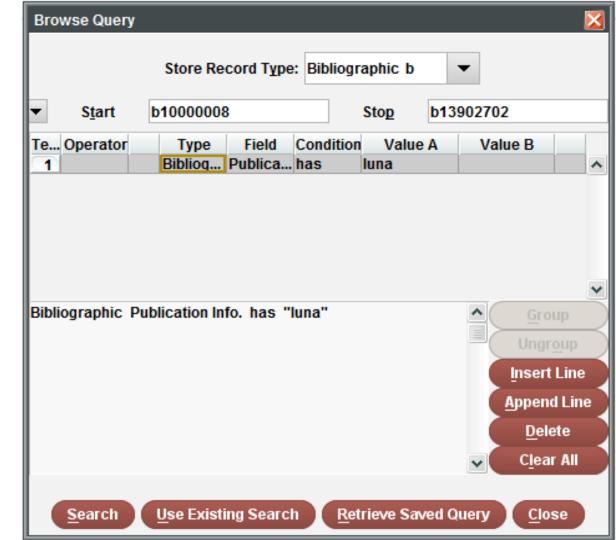


#### **Browse Query**

- Absolutely fantastic for very specialized search queries
- May require additional permissions
- Not available in Sierra 2.1
- Ephemeral
- Similar to Create Lists but does not take up a review file spot
- Cannot export records



# **Browse Query**



## **Troubleshooting**

- Confirm the words in your search are spelled correctly
- Use fewer, less specific words
- Use synonyms
- Try switching to either the singular or plural form of the word or adding a wildcard
- Double check you do not have a limit enabled
- Do not use the word NOT in your search query unless you are using it as a Boolean operator
- •Do not use a question mark in your search query unless you are using it as a single-character wildcard

#### **Questions?**

#### **Contact Info:**

Gem Stone-Logan High Plains Library District gstone-logan@highplains.us gemstonelogan@gmail.com



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