

WorldCat Discovery Search Fundamentals

2:00 pm – 2:49 pm Tuesday, October 17, 2023 | (UTC-04:00) Eastern Time (US & Canada)

WEBVTT

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Gena Cox 00:06:00.420 --> 00:06:17.060

All right, we're gonna go ahead and get started today. So welcome to Worldcat discovery search fundamentals. My name is Gina Cox. I am a product trainer here at OCLC and today I'll be talking about some of the central search techniques and configurations used.

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Gena Cox 00:06:17.180 --> 00:06:23.020

Discovery, so first let's start by talking about what we can expect this hour.

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Gena Cox 00:06:25.380 --> 00:06:44.580

Our learning objectives for this course are going to focus on performing basic searches, refining those searches by utilizing discovery search filters and then utilizing the advanced search page. now in between all of these will pause periodically to look at where any customizations for.

4

Gena Cox 00:06:44.620 --> 00:07:04.780

These areas live in the service configuration model modules excuse me and you may have access to service configuration or someone in your library system or organization may have access and that's okay. We're just gonna look at where those things are. So either you can work on configuring them or you can pass that information along to someone who can.

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Gena Cox 00:07:10.180 --> 00:07:30.660

So let's start by doing a quick level set for the view. We'll see today. This is the OCLC training libraries view of Worldcat Discovery. Now I have my own customizations here such as the branding choices and the colors we might use some terms for different areas of the page here, and those terms may also be seen in the learner guide.

6

Gena Cox 00:07:30.660 --> 00:07:51.140

That accompanies this class and I'll make sure that that link is shared in the chat at the end of this class. So everyone can take a look. So let's go through these, We have the search box in the middle

of the page here, pretty self explanatory. We then have the navigational bar when this is where our links live. We have my account to the top, right of.

7

Gena Cox 00:07:51.220 --> 00:08:01.180

This screen we have the advanced search and we have the chat with the library and feature if your library chooses to utilize that.

8

Gena Cox 00:08:03.300 --> 00:08:23.140

And finally we have a quick glimpse at the search results page. We'll be working with today. Again, this is customized to my design and yours may look a little bit different and that's just fine some of those differences would include the names of the filters on the left here and even the order in which they appear and we're gonna look at those customizations together as we kick off the session.

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Gena Cox 00:08:25.700 --> 00:08:29.820

All right, so let's jump right into basic searching.

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Gena Cox 00:08:31.460 --> 00:08:52.580

So here we see that same slide that we ended our introduction with, and we're gonna focus on that left side of the page with a red outline here we've placed the simple keyword search of intellectual freedom noted in the top search bar, and now we're going to work our way down this left filter panel. So let's zoom into the, to.

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Gena Cox 00:08:57.420 --> 00:09:13.060

First, we see a white strip above our filters and below our navigational panel, and this is where any of those filters we select will surface, if we see any filters, there, it means that, that filter is currently applied to our results set an.

12

Gena Cox 00:09:13.100 --> 00:09:34.180

Normally, after just placing a search, this would be empty, but I have a few here just so we can see how that looks directly below that white strip. We have the option to retain filters or clear filters now clearing filters returns us to that basic keyword search with no filters applied while clicking on retain filters will.

13

Gena Cox 00:09:34.380 --> 00:09:54.660

Entially freeze those filters in place and apply them to any of my subsequent searches. So, for example, here I have the filters used to return only print books at my library, which were published in the

last four years now, maybe after this search I want to search for a completely different item, but I still want those same filter.

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Gena Cox 00:09:55.620 --> 00:10:01.660

I could click on retain filters and save myself a little time for that. next search. I conduct.

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Gena Cox 00:10:04.460 --> 00:10:17.060

Retention down to that first option in the circled list of filters. We see, we see sort colon library. Let's start working our weight on this list and begin there.

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Gena Cox 00:10:20.300 --> 00:10:38.860

On the right here we see that sort drop down and the options that are available to us the top three here are best match recency and library. We'll talk about these three and more detail in just a moment below those. We have author which sorts by.

17

Gena Cox 00:10:39.060 --> 00:10:59.340

Authors last name organized by a, to z with special characters listed first We then have date by Newest and by oldest sorting either chronologically or reverse chronologically, we have most widely held, which is ungrouping our results and giving us a list of items in order.

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Gena Cox 00:10:59.540 --> 00:11:11.700

Worldwide Holdings, finally we have title sorted similarly to author listed alphabetically a to z with special characters listed first.

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Gena Cox 00:11:13.420 --> 00:11:33.900

Now to look more closely at those first three sort options, best match library and recency. These are helpful algorithms to get users the items they need and the most efficient way best match is what we call the foundational algorithm, rather than boosting one aspect of an item.

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Gena Cox 00:11:34.020 --> 00:11:55.020

Particular, it goes ahead and blends multiple boosts on several things like title author subject, it's going to prefer items that are more recent and more widely held and it's also going to show preference for items in your library or your consortium. Now this may not be the sort option for when you want to find.

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Gena Cox 00:11:55.660 --> 00:12:10.780

Item by just a few libraries and other states or other countries even items that you suspect might be in special collections, but rather this is that really great broad, all purpose search that most users are probably most comfortable with.

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Gena Cox 00:12:13.580 --> 00:12:32.780

The two additional sort options library and recency build upon the best match algorithm with a little touch of preference. So library takes all of the best match foundation and it boosts even further the items from your local collections while recency does the same, but.

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Gena Cox 00:12:32.900 --> 00:12:35.820

Boosts more recently published materials.

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Gena Cox 00:12:39.820 --> 00:12:58.380

It's like a lot of things with Worldcat Discovery and this will become a trend through the rest of this session, which of which sort option you have utilized by default can be chosen in the service configuration for your library. Now, again, like I said, earlier, if you have access, maybe someone else has access, this is where you would find that.

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Gena Cox 00:12:58.420 --> 00:13:15.700

Your default sort option can be set here under Worldcat discovery search settings, just a quick glimpse of where that is detailed steps if needed are linked to, in the learner guide as well, and we can see in this case, I have the library algorithm as my default sort.

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Gena Cox 00:13:18.860 --> 00:13:37.420

I'm gonna go ahead and pause here for a moment, if you have a question, feel free to type it in the chat, and I'm gonna open a poll if you don't see the poll, it could be that you are joining from a particular browser, something like that, but for most folks you should see a poll here.

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Gena Cox 00:13:37.500 --> 00:13:38.900

Just a moment.

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Gena Cox 00:13:43.820 --> 00:13:57.860

And that question is asking you about sort options. We have a library, B be best match and see recently, just go ahead and log your answers.

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Gena Cox 00:14:24.780 --> 00:14:34.740

All right, I'm gonna go ahead and close that poll here in fifteen seconds. It looks like pretty much everyone is on the same page here.

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Gena Cox 00:14:45.260 --> 00:14:52.100

All right, Nicole has been closed and the answer is, of course, best match. Great, thank you. everyone.

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Gena Cox 00:14:55.500 --> 00:14:58.660

So let's continue on here.

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Gena Cox 00:15:02.540 --> 00:15:21.100

We're gonna keep working our way down and we see about the search results display, which allows us to group or ungroup results is here next if we prefer to see our very seditions of titles grouped together or not. That's what's going to be happening here in this setting. This can be set by default if des.

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Gena Cox 00:15:21.300 --> 00:15:35.500

But the user can override it and select another option, if, if they'd like to, we also have the ability to expand our search with related terms. So let's take a quick look at these two starting with the search results display and how our items are grouped.

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Gena Cox 00:15:40.300 --> 00:15:57.580

So, default grouping allows us to bundle our results using show. All can sometimes provide too many results and overwhelm users. So we have the option here to hide duplicates or grouped additions and formats show all is exactly what.

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Gena Cox 00:15:57.660 --> 00:16:17.500

Sounds like all variants, additions and formats will display high duplicates will group variant records now variant records are the same addition of a work, but perhaps it's in a different language or perhaps it's literally a duplicate record that just hasn't yet been merged.

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Gena Cox 00:16:18.060 --> 00:16:38.540

Group editions and formats will group all related additions in the search results and we'll display a single representative record. Now these are going to be grouped by things like the work ID being title,

author format, things like language your publication and the first publisher entry.

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Gena Cox 00:16:38.540 --> 00:16:44.740

Users would then click into that representative record to look at the other additions and formats available to them.

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Gena Cox 00:16:49.420 --> 00:17:06.699

To expand a search with related terms means that when you place a search and discovery and those terms also match on the one XX and four XX fields of an authority record, I've speaking my catalogers now those additional terms found there will be included in the search.

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Gena Cox 00:17:06.699 --> 00:17:24.860

Now, again, in service configuration, in that same area under world cat discovery search settings, we can toggle on or off search expansions. We also have more information on this in the learner guide, but let's look at it in practice and jump over to our discovery interface live, so we can see how this works.

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Gena Cox 00:17:27.819 --> 00:17:44.220

Okay, so here we are in the training libraries discovery site and I've searched for a simple keyword in this case, philanthropy, now under here, the expand, the search accordion, I can toggle this feature on.

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Gena Cox 00:17:47.020 --> 00:18:06.220

And we'll see now that I have this new bar at the top of my search and this bar is letting me know that my search was expanded to include those related terms found in the metadata. I can click into this link in this bar to see which terms are being included and we have sever.

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Gena Cox 00:18:06.380 --> 00:18:26.700

New terms here that the system has found relevant in those authority records and included for us such as charity organization, humanitarianism and endowments, if we close this pop- up, we can take a look at our search results to see this. So again, we searched for fully anthropy.

43

Gena Cox 00:18:27.340 --> 00:18:47.180

But I see charity here included we, I see charity organization, we could go further down. I would probably find endowments here as well, but just noting here, I did not search for charities or charity organizations. I only searched for phanthropy and we are seeing those.

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Gena Cox 00:18:47.300 --> 00:19:07.340

Additional results in my search result set if I toggle the expansion option off in the middle of my search, those results are removed and all that remain are that specifically contain the original keyword philanthropy, which we can now see reflected here.

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Gena Cox 00:19:13.420 --> 00:19:16.660

Going back to our filters that we're working down.

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Gena Cox 00:19:18.020 --> 00:19:38.380

Below search expansions we have material type. We have quick links to select article or book for our material type as those, of course are most popular. it's nice to have these for quick access. Otherwise you can get really detailed here if desired, and we also see numbers following each format and these indic.

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Gena Cox 00:19:38.620 --> 00:19:42.180

How many entries exist for that type in the thousands.

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Gena Cox 00:19:48.620 --> 00:20:04.620

Next we have year of publication again, for quick access, we have some links to quickly calculate the last five ten and twenty- five years for us, alternatively, we can input custom ranges, if we want an item that.

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Gena Cox 00:20:06.160 --> 00:20:27.280

Only will need to put that year in both the, from range and the three range, if we put a year in the, from field, but leave the through field blank, we will get all items published from that year through to present day. So, just keep in mind if using this and wanting a very specific year only you'll want to make sure you put that.

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Gena Cox 00:20:27.360 --> 00:20:30.360

Year in both the, from and the, through range.

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Gena Cox 00:20:35.600 --> 00:20:52.240

Below publication, we have topic here Mine is labeled as subject terms to filter out specific subjects in our search. A note about this. So these terms listed here are not selected from subject headings, rather.

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Gena Cox 00:20:52.880 --> 00:21:12.720

The terms here come from the subject area, identified by the classification number assigned to the record and this is based upon the descriptive hierarchy used in the OCLC conspectus. You can find really detailed information on the Conspectus in the learner guide under the search filter section as well, and just by visiting help.

53

Gena Cox 00:21:12.960 --> 00:21:25.280

OCLC dot org. If you're interested, I just like to point out that, that is there and that, that difference is there and you can also go into customize this label to any of the terms. You see listed here as well.

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Gena Cox 00:21:30.640 --> 00:21:43.440

We then have author creator, which will display the top twenty- five results sorted alphabetically this label can be customized to create our person or author creator as well.

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Gena Cox 00:21:47.920 --> 00:22:05.200

And finally we have content, we have some self- explanatory options here such as peer review and nonfiction, but I want to point out the open access option, specifically, this filter is looking for records that contain either an eight fifty- six field with the indicators listed here.

56

Gena Cox 00:22:07.320 --> 00:22:21.760

Six field with a Subfield A listed, this is just something to be aware of if you're thinking something should be surfacing as open access and it isn't, you may want to go ahead and speak to your cataloger or take a closer look at that record to be sure.

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Gena Cox 00:22:26.320 --> 00:22:43.600

Remember at the start of the session, I mentioned that my interface might look a bit different than the one that your library is using and that extends to those filters. We just went through the common theme through all those filters. Is the ability to customize them. So I want.

58

Gena Cox 00:22:43.760 --> 00:23:03.080

To look over those options and how those can work for us. There are a few different ways to customize them and I have those listed here. We can play with the order that the filters are displayed. We can hide them entirely, we can choose to have them automatically expanded for

the user and we can also change the label that they have.

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Gena Cox 00:23:05.360 --> 00:23:18.240

Here I have a quick look at where those changes take place and the service configuration under search settings and search filter settings. We can also look at this live so while I bring that up, I'm gonna open a second pull for everyone.

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Gena Cox 00:23:19.440 --> 00:23:30.080

And the question is regarding the topic and subject filter and whether or not that is sourced from the OCLC conspectus. You should now see that poll open for you.

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Gena Cox 00:24:48.400 --> 00:25:08.880

All right, perfect. So looks like again, we're all in the same page here and the answer is, of course true. Thank you so much for your participation there, and you probably would have seen. I'm here, clicking on my screen getting us geared up to take a look at the service configuration, making sure I'm logged in here.

62

Gena Cox 00:25:08.960 --> 00:25:29.280

So we have under search filter settings, a few columns here. So first I can change the order in which these filters appear by using these up and down arrows here, and these are clicking on these, We'll move it one place in that direction.

63

Gena Cox 00:25:30.000 --> 00:25:49.840

I then have the ability here to toggle the filters to either show or be hidden entirely once hidden, they'll fall to the bottom of this list. So I'll click hide there and we see format has now floated to the bottom or sync to the bottom, rather under.

64

Gena Cox 00:25:49.840 --> 00:26:10.320

Expand or collapse. I can also go ahead and toggle these honor off depending on whether or not I want the filter to be automatically expanded for my user. So if I were to select offer and expand that field by simply toggling that on when the user places a search that filter will be automatically.

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Gena Cox 00:26:10.400 --> 00:26:14.960

Expanded to display those top twenty- five authors there for them.

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Gena Cox 00:26:16.120 --> 00:26:36.560

Finally, I have the display label where I'm given a dropdown of options to choose from, for the label. I'd like to give that heading so I can go through and change a few of these and for subject, that might be one that you want to change to something like topic, if you don't want to, cause any of that.

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Gena Cox 00:26:36.640 --> 00:26:46.880

Confusion with subject headings, we have, let's see author creator which we talked about, which can be changed to creator or person.

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Gena Cox 00:26:49.360 --> 00:27:01.400

And we have things like language and dialect as well. Once a change has been made here, those changes can be saved and they reflect pretty much immediately.

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Gena Cox 00:27:09.840 --> 00:27:19.480

So we've looked at a basic search and how to go about utilizing those filters. Let's switch gears and look at Worldcat discoveries advanced search.

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Gena Cox 00:27:22.000 --> 00:27:41.200

I want to quickly start by showing how this is a choose your own ADV adventure in terms of how to get to the advanced search screen, so we can access it from below the main search bar. We can also access it statically from the navigational bar at the top there and from, within the footer of the page as well.

71

Gena Cox 00:27:45.160 --> 00:27:55.560

Another way to access the advanced search screen and let me jump back into our discovery site live to show you that before we move on here.

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Gena Cox 00:27:57.840 --> 00:28:17.040

So I'm gonna return us to that original search. We placed for the keyword felithropy and perhaps I'm looking at this and I am just not quite finding what I'm looking for and I want to dig just a bit deeper and possibly search for multiple indexes here. So what I can do is from this initial search.

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Gena Cox 00:28:17.120 --> 00:28:24.280

Search results page. I can simply click on the advanced search link here in the navigational bar.

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Gena Cox 00:28:28.560 --> 00:28:45.840

And then we can see that Discovery has carried over that search term for me, and it's already placed it in the keyword index. So I have my starting point and I'm ready to keep going. So now that we're here, let's call out the three areas, we'll be looking at, We have the general.

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Gena Cox 00:28:45.840 --> 00:29:00.200

General search box rows clustered in the center of the screen below. We have search tools and to the right, We have our databases and we'll talk about each of these here.

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Gena Cox 00:29:01.200 --> 00:29:21.680

In the advanced search box, we already have our first subject index labeled for us and our term entered because again, we brought that over, we brought that information over from our previous screen, if we hadn't had anything prior, this would, of course just be blank, we can add more to our search by navigating to that next row and first choosing our.

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Gena Cox 00:29:22.000 --> 00:29:25.680

Operator, I'll leave it at end.

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Gena Cox 00:29:26.800 --> 00:29:36.640

Then we can choose the index. We'd like to search and we have several to select from here. I'll keep it simple and select offer.

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Gena Cox 00:29:38.320 --> 00:29:41.200

And I'll go ahead and put in the surname Smith.

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Gena Cox 00:29:43.440 --> 00:29:48.680

We can then continue and we can add additional rows if we'd like.

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Gena Cox 00:29:50.480 --> 00:29:55.600

I do want to briefly call up the indexes here.

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Gena Cox 00:29:57.040 --> 00:30:13.800

Talk for a moment about the difference between a word and a phrase search when we look at this drop down, we see things like author and author phrase subject and subject phrase and so on, and this is really a difference between a word and a phrase search.

83

Gena Cox 00:30:17.600 --> 00:30:37.440

Let's go back here and take a look at this. So, lots of information here don't feel like you have to absorb it. any catalog or in the audience. I'm sure loving the screen, but really, what is important to know, is that a word search is just that it's looking for those words to appear in any of the fields.

84

Gena Cox 00:30:37.440 --> 00:30:57.920

You see listed here in that first column of our chart. Whereas a phrase search is like using quotations. It's looking for an exact phrase and it's looking in very specific places, so you'll naturally get a more narrowed scope of results if your user is using the phrase index and perhaps not getting the breadth of.

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Gena Cox 00:30:58.320 --> 00:31:18.400

They were expecting, this could be why, and for those comfortable with manually using indexes in their searches, the word search index would use a colon, whereas the phrase index would use the equal side. There are a lot of good resources on indexes out there of course, and we have quite a few on help dot OCLC- dot org as well. So please explore.

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Gena Cox 00:31:18.480 --> 00:31:20.520

Those as time permits.

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Gena Cox 00:31:23.720 --> 00:31:28.960

Let's look directly beneath the search boxes to the search tools section here.

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Gena Cox 00:31:31.840 --> 00:31:51.040

I tend to think about search tools as a pre- filter filter. That's an unofficial label that I've given it, but that's kind of how I think about it. So what do I mean by that? So here in search tools, we see a lot of similar options that we saw at the beginning, we have the ability to group or ungroup our results. We.

89

Gena Cox 00:31:51.040 --> 00:32:11.520

We can choose our material type our publication year and so on some of these options will appear or not based on the databases we're searching, if let's say we were searching a single database that only had content in one specific language, we may not see that language drop down here because it wouldn't be necessary.

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Gena Cox 00:32:12.160 --> 00:32:32.000

However, a few fields are static such as year and location. So in calling this a pre-filter, what I mean is that we can continue to narrow these results, even further once we get to our results page and we'll see that in a bed, but search tools essentially lets us lay the initial groundwork.

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Gena Cox 00:32:32.120 --> 00:32:33.760

Of our search.

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Gena Cox 00:32:37.120 --> 00:32:55.680

And the final thing we'll look at on this page is the database section. So to the right of the advanced search screen is where we'll see our databases on your screen. You should be seeing a red arrow to that databases section, and let me go ahead and jump back into our.

93

Gena Cox 00:32:55.960 --> 00:33:16.160

Interface, so we can look at this in real time. The first thing we'll want to note is the searching databases according here this is usually expanded out by default and we can see that if I were to conduct a search right now, it would only be searching world cat-dot org. Now what I can do then is.

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Gena Cox 00:33:16.400 --> 00:33:36.640

If I'd like to include other databases is navigate down to any of these database groups. I have here if I know what topic I'd like to search within, or I can go down to all databases and expand that accordion to find any of those specific databases that I'm looking for. So, for example, if.

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Gena Cox 00:33:37.440 --> 00:33:57.120

My search is related to science. I can go down to my science group here and expand that, and I can select all in the group or I can pick and choose ones that I would specifically like to search. I'll then come back up and click save changes very important. Step.

96

Gena Cox 00:33:57.200 --> 00:34:16.919

Here, because we want these changes to apply to our next search, and now I can see that the new database surface, the new two databases rather surface in the searching accordion. So I know it will now be applied to my search. I have the ability to click reset then, which would return me to my default settings.

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Gena Cox 00:34:18.240 --> 00:34:21.600

Now these database groups here are completely customizable.

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Gena Cox 00:34:24.639 --> 00:34:41.200

So I've often seen academic libraries create groups based around majors around different schools, such as law and business or medical and nursing. So feel free to play around with these and really customize them to whatever the needs are of your users.

99

Gena Cox 00:34:45.760 --> 00:35:03.040

And here we can see an example of how to set up those database groups on the left here we have a view from, within service configuration under the meta search content tab and I have the ability to create a group name, it anything I'd like, and then bundle any of my Databases.

100

Gena Cox 00:35:03.320 --> 00:35:20.560

Into that group. in my example, here I've created a group that I've called Quick Search and I've bundled in some really popular databases for quick and easy access beneath that. I've also created a group called Art and Design Education and so on.

101

Gena Cox 00:35:24.160 --> 00:35:35.520

And once I have my indexes and search terms entered my search tools applied in the way that I like, and I have my desired databases selected. I can then go ahead and click search.

102

Gena Cox 00:35:39.520 --> 00:35:57.440

Once that search is placed, you'll notice, I have a call out of the resulting search box here. Now what I want to highlight is that once you place your search from the advanced search screen discovery essentially takes what you entered and formats it into a search string as we see here. Now if.

103

Gena Cox 00:35:57.680 --> 00:36:17.920

Comfortable using search strings and forming them yourself. You can also enter that string directly into the search box and receive it receive these same results. So here we see that I searched for the keyword philanthropy, the subject phrase, nonprofit organizations and I also have specified that I'm looking for articles.

104

Gena Cox 00:36:18.040 --> 00:36:25.280

Not books, now this leads us into Bullyons and Wildcards, which I

briefly want to touch on next.

105

Gena Cox 00:36:28.160 --> 00:36:46.720

Now for those who are comfortable with Bully and operators and Wildcards truncations and so on just bear with me for the next minute or two, but for those unfamiliar, I have a few examples here. I want to look at. So we have Bullyan searches first like, and, or, and not.

106

Gena Cox 00:36:46.800 --> 00:37:07.200

Using and will narrow your results because both terms must be present using or will expand your results because either term can be present while cards can be used for a variable character, for example, I have here a wild card in the word Organiz.

107

Gena Cox 00:37:07.840 --> 00:37:27.680

Where the z- typically would be in the American spelling. Now this might be important when trying to capture British spelling, for example, using that wild card means that the spelling using either the z or the S- would return results pronunciation searches allow for variable.

108

Gena Cox 00:37:27.720 --> 00:37:48.160

An additional endings towards to surface results having me asterisk wildcard at the end of traffic regulate means that I could get results for either traffic regulation or traffic regulator, and so on again, feel free to try these out in discovery and use these manually.

109

Gena Cox 00:37:48.280 --> 00:38:03.600

In your searches, I'm gonna go ahead and open our third and final poll here and use this moment to pop any questions you may have into the chat box.

110

Gena Cox 00:39:21.600 --> 00:39:42.080

All right, thank you. Everyone for participating there kind of a weird obscure question. I threw at you, but you all did great anyway, so which two of the search tools are going to remain static that is year and location. So, again, those other options that you see under search tools may appear or disapp.

111

Gena Cox 00:39:42.320 --> 00:40:02.560

Depending on the database that you are searching because some of those tools just may not be relevant for those databases, but no matter what year and location will always be there. All right, let's continue on.

So we've placed a search. We've put some parameters on it.

112

Gena Cox 00:40:02.680 --> 00:40:07.480

In the advanced search and now we have our results to look at.

113

Gena Cox 00:40:09.600 --> 00:40:29.440

And we're gonna start by going all the way back to where we started filtering again. So remember I said, I think of search tools as a pre-filter. So this is what I meant here here we can just see that we have the ability to apply filters onto already filtered results in this example, I.

114

Gena Cox 00:40:30.800 --> 00:40:51.240

Search screen to search for the subject term, Ohio use the Bulliant operator and, and then specify my search tools material type as map. You can see all of this at the top of the screen labeled with the number one. So this means that my results are going to return any.

115

Gena Cox 00:40:51.240 --> 00:40:55.120

Map that references the state of Ohio as a subject.

116

Gena Cox 00:40:56.360 --> 00:41:16.160

Now once I get to my result screen, we can see here to the left labeled number two that my material type filter is already narrowed down to just the map material. So I don't see any other material type here. The search tools has done that work for me and laid that foundational search on my behalf.

117

Gena Cox 00:41:16.840 --> 00:41:37.320

However, discovery is going to offer me any of the material subtypes of maps to continue to choose from. So this means that I have the ability to filter down even further and select e- map, for example. So this is just an example here of how the items selected using the advanced search screen. Create almost a new.

118

Gena Cox 00:41:37.360 --> 00:41:45.080

Foundational search for you, and you then have the ability to continue refining it as you go along after you've placed that search.

119

Gena Cox 00:41:50.120 --> 00:42:06.760

We spoke about the databases selection on the advanced search screen. So let's talk about it one more time. Here the database is being

searched on the advanced search screen. Also carry over here to our search results page and can be toggled on or off at the users.

120

Gena Cox 00:42:06.920 --> 00:42:27.240

Discretion, however, you'll notice there is a white bar at the bottom of the screen here, and this is where your remote databases will surface if discovery finds relevant matching content within them. so these remote databases sometimes require authentication to access and if so they'll exhibit a little.

121

Gena Cox 00:42:27.880 --> 00:42:47.720

Icon a little pad lock icon on them to let us know that the user needs to be signed in, but this is great that the surface here for us often we're paying for this content, right? So we want our users to take full advantage of it and to know that when they, the content that they are looking for was also.

122

Gena Cox 00:42:47.800 --> 00:42:51.920

Found to be relevant to their search in these other remote databases.

123

Gena Cox 00:42:56.040 --> 00:43:13.960

Another thing you may have noticed about our search results through the session is the presence of these highlighted terms. These are our search relevance indicators and they live on our search results pages. So when we're actually placing our search, our results are going to locate those search term.

124

Gena Cox 00:43:14.160 --> 00:43:26.280

In our results and highlight them for us, so we can gauge where that result is coming from and where in the record those terms were picked up. You can also see this on the item detail screen.

125

Gena Cox 00:43:31.880 --> 00:43:48.520

This, like, most things is configurable and service configuration under search settings where we've been working, we see under the search default section, we can toggle on our, off the display of those indicators. Some may find them distracting some may find them really use.

126

Gena Cox 00:43:48.600 --> 00:43:53.120

So, again, really up at really up to your discretion.

127

Gena Cox 00:43:59.400 --> 00:44:15.040

Also on a results, we have the link to view the additions and formats of this work. We talked a little about that as well at the beginning of the session and this link would take us to that view of all those additions on grouped for us to look through.

128

Gena Cox 00:44:19.240 --> 00:44:32.040

Now if this is something you'd like to op, not to display, you can simply toggle that link off to remove it from the brief view of the representative record and that is under search settings and search results settings.

129

Gena Cox 00:44:39.080 --> 00:44:59.560

Finally, I want us to take a quick look at the actual results page. in this example, I've searched for and received a result for the Dutch house, a title by Anne Patchet. Once you have your results, I wanted to just illustrate how much of this is actionable here, for example, here you can see that I've pulled out the author line.

130

Gena Cox 00:44:59.560 --> 00:45:18.080

And if you were to click on an Patrick's name, you would be taken to a new search using the author index and her name as the search term. You'll note we have the equal sign there telling us that's an author phrase because it's looking for that exact wording.

131

Gena Cox 00:45:23.320 --> 00:45:33.400

Clicking the title itself will take us into the item detail screen and here you can see those same yellow relevance indicators showing up for us.

132

Gena Cox 00:45:37.320 --> 00:45:53.120

And the show more link would expand some of the fields we've chosen to display here. I have that field expanded here. So mine is showing as show less, which I could roll those results back up.

133

Gena Cox 00:45:56.520 --> 00:46:15.720

So this screen marks the end of our searching actions and we'll pick back up in the next class, which is world cat discovery interface features where we look at how a user goes on to interact with discovery such as what you see when you actually click into the details of this item and then actually get a hold of this item, which would be those.

134

Gena Cox 00:46:15.760 --> 00:46:25.160

Next steps and we do have a few moments, I'll pause here if anyone has any questions they would like to put into the chat.

135

Gena Cox 00:47:05.640 --> 00:47:14.960

All right, so I'm gonna go ahead and stop sharing here and I'm also going to put a link into the chat for everyone.

136

Gena Cox 00:47:17.160 --> 00:47:28.040

And this is going to be a link to the learner guide that accompanies this class here and the learner guide expands on several of the topics that we discussed today.

137

Gena Cox 00:47:31.240 --> 00:47:49.800

All right, there is that link surfacing in the chat for you. You'll also get a follow-up email with the details on how to access the recording of this class and it'll also link to the learner guide as well. So that concludes the session. I want to, thank you so much for attending this class on searching.

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Gena Cox 00:47:50.440 --> 00:48:07.120

Fundamentals in world cat discovery, if you have any questions about Worldcat discovery, not covered by this class, or if you need any assistance or support, please visit help dot OCLC- dot org and use the link at the top of the page to open a support ticket and get that answer.

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Gena Cox 00:48:09.000 --> 00:48:22.840

All right, thank you. Again. Have a good rest of your afternoon or evening. Wherever you are in the world and we appreciate you so much. Thank you for joining me today and we'll see you in the next one. Bye-bye. Everyone.