Repository Search in Alma

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University of Pennsylvania Libraries

Site: https://upenn.alma.exlibrisgroup.com/SAML

The Search the Repository function in Alma allows you to search for specific types of inventory such as a physical titles, physical items, electronic collections, and electronic portfolios.

Alma provides access to two distinct zones/repositories: the Institution Zone, which is our local inventory, and the Community Zone, which contains the Community KnowledgeBase of vendor-provided records for e-resources, shared records in the Community Bibliographic Catalogue, and Global Authority Files. Select the repository to search: (Institution Zone).

Repository searches

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**All Titles** – search and display bibliographic and holding information for all records in the repository.

**Physical Titles** – search and display bibliographic and holdings information for physical resources.

**Physical Items** – search and display item and holdings-level information for physical resources.

**Electronic Titles** – search and display bibliographic and electronic collection information about electronic resources.

**Electronic Portfolio** – search and display electronic journal and ebook titles within a package.

**Electronic Collection** – search and display electronic packages, which include portfolios, or databases, which include URLs, information.

**Authorities** – authority records for names and subjects.

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**Digital Titles and Files** – N/A, no digital content in Alma currently.

**Collections** – N/A, no Collections in Alma currently. Collections are a catalog entry that groups any number and type of resources together.

Persistent Search

The **Persistent Search** box (appears below the top menu) includes both the entity to search (All titles, Titles, Electronic portfolios, Invoices, Vendors, and so forth) and the main search criteria (Keywords, Title, and so forth). The default repository search is for All titles. The default search criteria and other searchable fields in the drop-down menu vary depending on the selected search entity. For example:

The All titles searchable fields are those common to all record formats but does not include fields specific to physical or electronic inventory.
Simple Search

To perform a simple search:

1) Select the search type from the drop-down list. All users can perform these types of searches: All titles; Physical titles; Physical items; Electronic titles; Electronic portfolios; Electronic collection; Digital titles; Digital files; Collection; Authorities. Other searches are limited by user role.

2) Select the field on which to search in the second drop-down list, or select Keywords or All (depending on the selection in the first drop-down list) for a general search on multiple fields.

3) Enter a search string in the text box.

4) Click the magnifying glass or press Enter on the keyboard to perform the search.

Note:
- To jump to this text field on any page that does not have any other kind of search box, press / (forward slash) on your keyboard.
- Search syntax for simple searches:
  - Include or omit articles (the, a, an).
  - Special characters, like the hyphen, dash, slash, and so forth, are ignored.
  - Truncation * after three characters (according to the Ex Libris documentation).
  - Truncation * cannot be used if the search content contains a dash.
  - The question mark (?) is not supported as a wildcard character.

- Alma saves the last 10 searches in search history for title or inventory entity searches. This list is saved indefinitely. There is currently no way to clear the list (other than to perform new searches).

- To rerun a recent simple or advanced repository search (including the search type, field, and search string), click the text box and select a previous search from the drop-down list that appears; the search runs immediately. This feature is not available for non-repository searches (PO lines, funds, and so forth), but you may be able to select a previous search string using your browser history.

Sample Simple Searches

1. Simple: All titles - Keywords

The Keywords search index is a general index that contains values from many, but not all, fields.

Results Screen
a. Default sort order is **Relevance rank** - see page 10.

   b. **Primary and secondary sort** - options depend on the search performed.

   c. **Facets** – options depend on the search performed, see page 10.
d. **Move** between pages of 20 records.

e.  

f. **Icons** – see page 10.

g. **Links** - Title, Availability, Holdings, Items, Portfolio List, View It, linked Data, More Info.

i. **Tasks** that display are dependent on the roles assigned.

**Customize Search Results View**
The fields displayed in a repository search result can be customized. To change which fields are shown, click the gear icon in the upper right. In the “Title Information order” menu, check or uncheck boxes to display or hide individual fields and select the number of columns in which the fields will display. Click the **Show All** button to see all of the available fields relevant to the results list.

In the “Action Order” menu, control which actions are available with a right-click of the mouse. Change the order the actions appear by dragging them up or down the list. The first two actions will appear as buttons for quick access.

Click **Save** at the top of the “Customize view” page for changes to go immediately into effect or click **Cancel**. To start over, click **Restore list defaults**.

**Search results record view:**

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2. **Simple: Physical Titles - Keywords**

Only records for physical titles appear in the results.
3. Simple: Physical Items - Keywords

The results of a physical item search will contain more specific location information, barcode, and status. Note: The sort options differ for physical item searches.

![Search results for earth science](image)

See Other details link for circulation history.

4. Simple: Names

The Creator index includes only these MARC bibliographic fields:

- 100 a-d,j,q,u / 110 a-e,n,u / 111 a,c-e,n,q,u / 700 a-e,j,q,u / 710 a-e,i,n,u / 711 a,c-e,i,j,n,q,u

The Names index includes many more MARC fields where name information is recorded. For example:

- 245 c / 400 a-d,g & other 4XX subfields / 505 r / 508 a / 511 a / 600 a-d,g,j,q,u & other 6XX subfields

5. Simple: Subjects

Things to note:

- Subjects searches include LC, MeSH, and local subject headings.
- There is no subject heading browse option in repository search box.
- Alma supports browsing by author name, subject, series, title and call number only in the MD Editor.
  - In the MD Editor, click Tools > Browse Bib Headings
  - From the persistent menu, click Resources > Cataloging > Browse Bibliographic Headings
6. Simple: Permanent Call Number

Search physical items in order to specify the permanent call number from the holdings.

Note:
- This is a keyword search so elements of the search may be found anywhere in the call number.
- To browse call numbers as entered in the holdings record’s 852 $h field, use Browse Shelf Listing.
  - In the MD Editor, click Tools > Browse Shelf Listing
  - From the persistent menu, click Resources > Cataloging > Browse Shelf Listing

7. Simple: Electronic Titles

Note the three possible icons for electronic resources (See appendix on page 11-12).

8. Simple: Electronic Portfolio Title

9. Simple: Electronic Collection
Click Portfolio List in the search results to see the full list of portfolios. Use the Facets to narrow the results.

10. Simple: MMS ID

001 field, the MMS ID will be 8 to 19 characters long. UPenn MMS IDs begin with 99 and end with 3503681. For migrated records, the Voyager Bib ID is between the 99 and 350361 in the 001, so they can be searched by adding the prefix (99) and post-fix (350361).

11. Simple: Other System Number for Voyager Bib ID

Other Standard Number searches the 035 field which contains the bib number for migrated Voyager records. This is the format: 035_|a (PU)7241310-penndb-Voyager
The bib number may be enough, but if there are other matches, append -penndb-voyager to the number searched.

Advanced Searches

The advanced search allows you to combine conditions across indexes or apply multiple conditions to the same search index.

To perform an advanced search:

1) In the persistent search box, click Advanced. The persistent search box expands to include the option to add additional rows of search criteria (additional fields and values).
   The search starts with a single row. Each row contains a search field drop-down list (you can enter some text to filter the options), a comparison drop-down list, a search criteria text box/selection list, and some icons. Fields in the field drop-down list may be grouped by the entity to which they apply.

2) To add additional rows, click the duplicate row icon (_duplicate_row_icon) or add row icon (_add_row_icon). To remove a row (other than the first), click the delete row icon (_delete_row_icon).
3) By default, each row represents additional search criteria that must also match (“AND”). Select “OR” in any row (other than the first) to change the combination type to OR. Implied parentheses are added around all search rows connected by ANDs.

4) Depending on the field you select, select the match type in the comparison drop-down box. Typical match types include **Contains Keywords** (words in any order, separated by spaces), **Contains Phrase**, **Is Empty**, **Starts With**, **Equals**, **Not Equals**, **Greater Than**, **Greater Than or Equal To**, **Less Than**, **Less Than or Equal To**, **Not In**, **Not Contains Keywords**, **Not Contains Phrase**, and **Is Not Empty**.

5) Depending on the match type you select, enter or select the full or partial value(s) in the last field in the row. This field may be a text field to enter free text, a drop-down list, or a calendar selection tool.

6) Click **Search** or press Enter on the keyboard. The results of an advanced search appear on the page, below the advanced search form. The current search logic appears at the top of the results.

**Note:**
- Most of the fields are self-explanatory. See the Ex Libris Alma “**Additional Information for Advanced Search – Add Conditions Options**” table for a description of the search fields. See the **Search Indexes** table for a listing of indexed MARC tags.
- For some searches, you can search for the absence of a field (for records that contain a specific field that is not populated). For example, you can search for physical items without barcodes or other information. Select the **Is Empty** option after selecting the desired field.

### Sample Advanced Searches

**12. Advanced: Author/Title search**

![Advanced: Author/Title search interface](image)

Note: **Clear form** removes all search criteria. Click on **X** icon to remove only one condition.

**13. Advanced: Phrase Search**

![Advanced: Phrase Search interface](image)

Other options include: **Contains Keywords**, **Equals**, **Is Empty**, **Starts With**, **Not Contains Keywords**, **Not Equals**, **Not Contains Phrase**, and **Is Not Empty**.

Note: Language is determined by the contents of MARC 008/35-37 and one or more 041 $a entries

15. Advanced: Electronic title in specific collection

16. Advanced: Specific material & resource type

17. Advanced: Library & location
Appendix: What to note when looking at search results

Results depend on the inventory search performed:

- Results of an All Titles search include physical, electronic, and digital titles.
- Searches of physical, electronic, or digital titles or items will only include the relevant inventory type.
- The content of and links associated with each result vary according to the inventory type.
- For title search results, inventory tabs such as Physical, Electronic, and/or Digital, and an Other details tab appear below each result. The number of holdings/portfolios/representations appears in parentheses in the name of the tab. Select a tab to expand or collapse more information about the result.
- If you want all physical or electronic inventory information to appear expanded by default for every search, select the relevant option for Expand. Your selection remains from session to session.
- Action options that display depend upon a user’s assigned roles.

- Facets displaying on the left depend on the search type selected.
- The content of the Other details link will vary depending on the search conducted.

Sort options:

You can manually apply primary and secondary sorting using the drop-down lists at the top of the search results. Both drop-down lists offer the following options (where **Asc** = ascending and **Desc** = descending). These sorts are available for All titles, Physical titles, Physical items, Electronic titles, and Electronic collections (Sort by only), searches:

- Rank
- Title – Asc and Desc
- Creator – Asc and Desc
- Publication Date – Asc and Desc

These additional sort options are available for Physical Items searches:

- Call Number – Asc and Desc
- Alternative call number – Asc and Desc
- Accession number – Asc and Desc

Search types and the facets that display:

- **All titles** – Material Type, Language, Publication Year, Resource Type.
- **Physical titles** – Material Type, Language, Publication Year, Resource Type.
- **Physical items** – Item Material Type, Library, Process Type.
Electronic titles – Material Type, Language, Resource Type.

Electronic portfolio – Type, Interface, Electronic Collection Type, Service, Electronic Material Type.

Electronic collection – Type, Interface, Electronic Collection Type.

Facets: Where they come from:

- **Material Type** - Book, Computer file, Journal, Map, Mixed material, Music, Visual material. Based on the bibliographic record LDR 06 (Type of record) & 07 (Bibliographic level) positions.
- **Resource Type** – Based on the LDR 06 & 07 *and* 008. More detailed than the Material type.
- **Item Material Type (a Physical item facet)** – Also known as Physical Material Type. Selected from the item record Material type drop-down menu.
- **Process Type (a Physical item facet)**: Status of item such as: Loan, Claimed Return, Work Order Types.
- **Type (an electronic collection or portfolio facet)** = Selective package, Aggregator package, Database.
- **Electronic Material Type** – Portfolios have an electronic material type. Chosen from drop-down at time of record creation/editing.
- **Electronic Collection Type** – Book Package, Journal Package, Mixed Material Package.
- **Service (an electronic portfolio facet)** - Full Text, Selected Full Text, None (for database type).

Informational Icons that appear in results:

<table>
<thead>
<tr>
<th><strong>AS SEEN IN THE INSTITUTION ZONE (IZ)</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>(no icon)</td>
</tr>
<tr>
<td>![ suppression_icon ]</td>
</tr>
<tr>
<td>![ electronic_icon_* ]</td>
</tr>
<tr>
<td>![ electronic_icon_off ]</td>
</tr>
<tr>
<td>![ electronic_icon_off ]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>AS SEEN IN THE COMMUNITY ZONE (CZ)</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>(no icon)</td>
</tr>
<tr>
<td>![ community_icon ]</td>
</tr>
</tbody>
</table>

Relevance rank factors include:

- **Term Frequency** - The higher the term frequency in the document, the higher the document score.
- **Inverse Document Frequency** - The rarer a term is across all documents in the index, the higher its contribution to the score.
- **Coordination Factor** - The more query terms found in a document, the higher its score.
- **Field Length** - The more words a field contains, the lower its score. This factor penalizes documents with longer field values.
Important Ex Libris Search Documentation

- Searching in the Repository
- Repository Searching, Indexing
- Search Indexes

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