

Evergreen Catalog Search Essentials Manual

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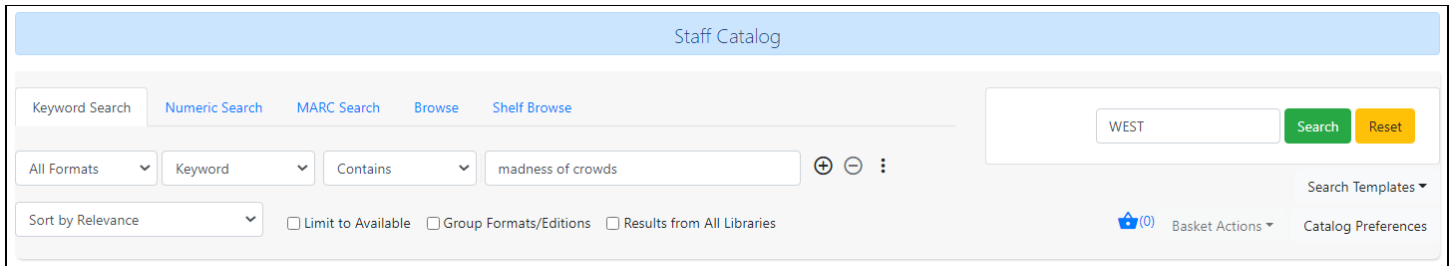
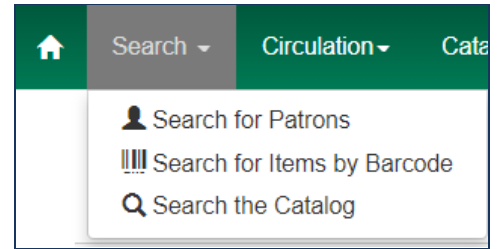
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Search the Catalog

1. Start a search

- Go to Search > Search the Catalog
- Go to Cataloging > Staff Catalog

You can also start a keyword search from the home screen.



2. Enter search terms in the Query box. By default, Evergreen searches bibliographic records in all libraries' collections by keyword. Evergreen search uses *stemming* to allow search results to contain variants of the search term. You can also

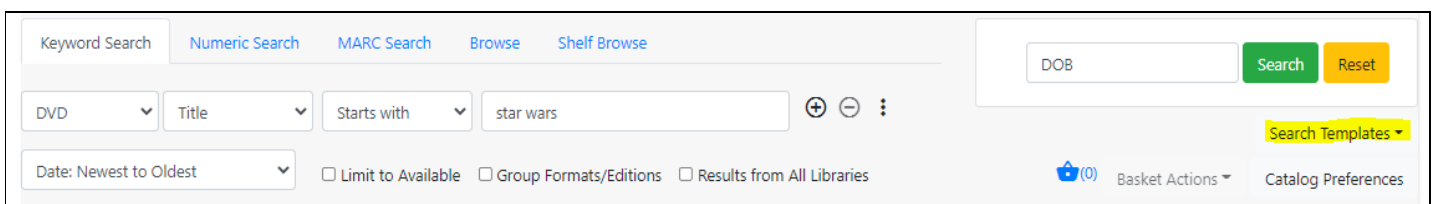
- Choose a format like All books, All music, DVD, etc. (optional)
- Choose an title, author, subject, or series search index (optional)
- Choose a different search operator like Does not contain, Matches exactly, etc. (optional)
- Choose a library to limit your search to items owned by a library (optional)

Optional

- Click the + to add additional queries
- Limit to Available Items
- Group Formats/Editions
- Results from All Libraries
- Choose Sort Order

3. Click Search

Search Templates can be created that will save search parameters for future searches. For example, set the format, index, operator, and sort order to find results for DVDs where the title starts with a word, newest first.



Results Display

Sort by Relevance Limit to Available Group Formats/Editions Results from All Libraries 0 Basket Actions ▼ Catalog Preferences

Search Results (67) Select 1 - 50 1 2

Personal Author	1.	The Madness of Crowds	3 / 32 items	@ WEST	TCN: 5196704	Created 7/2/21 by douglas.wray
Hardy, Thomas 1840-1928 9		Penny, Louise	0 / 1 items	@ GRE	Holds: 5	Edited 7/2/21 by douglas.wray
Mackay, Charles 1814-1889 7		Large Print Book				<input type="button" value="Place Hold"/>
Penny, Louise 4		Call Number: LARGE PRINT MYSTERY PENNY				
Abercrombie, Joe 1		Publisher: Thorndike Pr 2021				
Aral, Sinan 1		ISBN: 9781432890889 : HRD, 1432890883 : HRD				
Corporate Author	2.	The madness of crowds	20 / 24 items	@ WEST	TCN: 5199388	Created 7/23/21 by douglas.wray
Crowded House (Musical group) 1		Penny, Louise	1 / 1 items	@ GRE	Holds: 2	Edited 7/23/21 by douglas.wray
		CD Audiobook				<input type="button" value="Place Hold"/>
		Call Number: AUD CD PENNY (12CDs)				
		Phys. Desc.: sound disc, audio discs : 4 3/4 in.				
		Edition: Unabridged.				
		Publisher: New York, NY : Macmillan Audio, [2021]				
		ISBN: 9781250810670 : CMD, 1250810671 : CMD				
Topic Subject		The madness of crowds -- gender roles and identity.				Created 12/20/19 by

A list of matching titles displays in order of relevance

- Similar to a search engine like Google, rather than in alphabetical or chronological order
- Relevance is determined using a number of factors, including how often and where the search terms appear in the item description, and whether the search terms are part of the title, subject, author, or series.
- Click *Sort by Relevance* to change to an alphabetical or chronological sort order
- **Display and Filtering Options**
 - Show More Details
 - Grouping by Format and Edition
 - Limit to Available Items
 - Group Formats and Editions
 - Show Results from All Libraries
 - Exclude Electronic Resources
 - Boolean operators
 - Filters based on:
 - MARC record entries like language and format
 - Item level descriptors like Item Type and Shelf Location

See More Details

4. Click a title for more details and item holdings

Record Summary [Large Print Book](#)

Title: The **Madness of Crowds** **Edition:** **TCN:** 5196704 **Created By:** douglas.wray
Author: Penny, Louise **Pubdate:** 2021 **Database ID:** 5196704 **Last Edited By:** douglas.wray
Bib Call #: 823 **Record Owner:** **Created On:** 7/2/21, 8:09 AM **Last Edited On:** 7/2/21, 9:56 AM

Start Previous Next End Back to Results (1 / 67) Patron View Place Hold Add Holdings Serials Mark For... Other Actions

Item Table [MARC Edit](#) [MARC View](#) [View Holds](#) [Monograph Parts](#) [Holdings View](#) [Conjoined Items](#) [Shelf Browse](#) Set Default View

#	Location	Call Number / Item Notes	Part	Barcode	Shelving Location	Circulation Modifier	Active/Create Date	Holdable?	Status	Due Date
1	GRE	LARGE PRINT MYSTERY PENNY		31009154872448 View Edit	New Book	Book	11/16/2021	Item Hold Call Number Hold	In transit	
2	BRO	LARGE PRINT PENNY		31004151790842	Large Print	Book	09/24/2021	Item Hold	Checked out	12/30/2021

- The Record Summary includes bibliographic (MARC) record information and the Title Control Number (TCN) that identifies that particular bibliographic record.
- The Navigation bar allows you to move to a different record or go back to the Results.
- The Action buttons allow you to perform different actions: Patron View opens a new tab with the public version of the catalog, Place Hold opens the hold request form, etc.
- The Item Table includes item information: Location (Owning library), Call number, Barcode, Shelving location, Circ modifier, Creation date, Holdability, Status, and Due date.
- Under an item barcode, select View to open a new tab to see an Item Quick Summary, Recent Circ. History, Circ. History List, Holds/ Transits, Cataloging Info, and Triggered Events.
- The tabs toward the top of the page allow you to change views.
 - MARC View displays bibliographic record
 - View Holds displays patron holds; choose WEST to see all holds or a 3-letter code to see holds at one pickup library

Item Table [MARC Edit](#) [MARC View](#) [View Holds](#) [Monograph Parts](#) [Holdings View](#) [Conjoined Items](#) [Shelf Browse](#)

Pickup Library: WEST

Pre-Fetch All Holds

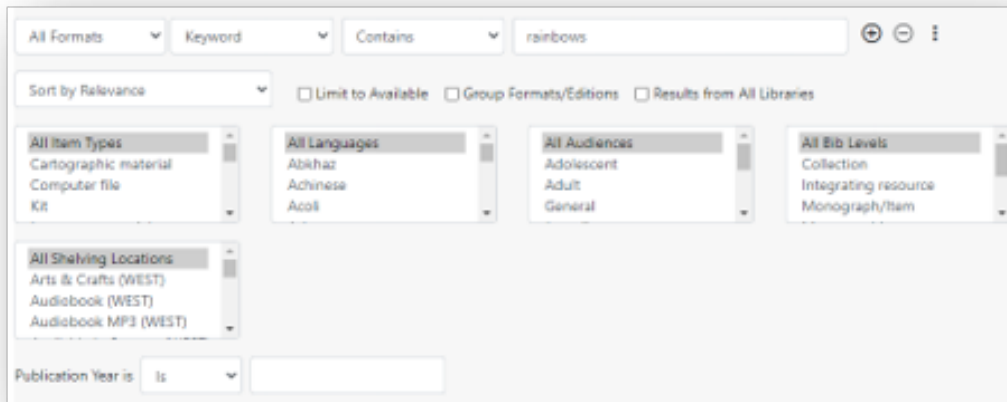
#	Pickup Library	CN Full label	Title	Current Item	User Display Name	Request Date	Capture Date	Queue Position
1	PEL	LARGE PRINT FICTION P...	The Madness of Crowds	31009154872448	SMITH, ROBERTA S.	9/17/21, 2:03 PM	12/6/21, 3:12 PM	1
2	SCA		The Madness of Crowds		STAFFORD, CARYN	12/1/21, 11:40 AM		2
3	BRO	LARGE PRINT MYSTERY ...	The Madness of Crowds	31009154872448	ULRICH, ELLEN S	12/1/21, 11:40 AM	12/7/21, 11:54 AM	3
4	YWI	LARGE PRINT MYSTERY ...	The Madness of Crowds	31009154872448	TEPLIN, LYNNE	12/4/21, 4:15 PM	12/7/21, 3:21 PM	4
5	MTD	LARGE PRINT MYSTERY ...	The Madness of Crowds	31009154872448	CYSTERMAN, GAIL RBY	12/10/21, 9:17 AM	12/10/21, 9:57 AM	5

- Holdings View is a condensed display of up to 100 items per page
- Choose Set Default View to see that display whenever a results list title is clicked.

5. Use the public catalog (catalog.westchesterlibraries.org) to see the patron catalog with additional details
- Content Description, Search for related content by subject and genre, Reviews, Suggestions, Summaries and More, Google Preview (if available)
 - Create, save, print title lists with a local call number

Enhanced Search Filters

Click the **+** button to open additional search fields. Click the three-dot menu to open filters that include call number and item record information



Enhanced Search Filters

- Item Type, includes general format limiters like music, non-musical sound recording, video, etc.
- Language
- Audience, includes Pre-K, Primary, Adult, etc.
- Bib Level, includes serials
- Shelving Location (this works well if searching a specific library)
- Publication Year

Keyword Search Tips

Adjacency

To search for a phrase, enclose your search terms in quotation marks.

(example: "garcia marquez")

Truncation

Use a single asterisk * at the end of a word to truncate any number of characters

(example: environment* agency)

Anchored Searching

Use ^ and \$ to indicate "phrase begins with" and "phrase ends with," respectively, within a search phrase enclosed in quotation marks.

(examples: "^harry" for phrases that begin with the term harry. "stone\$" for phrases that end in stone.)

Boolean Operators

AND / OR

Instead of NOT, use "-" as a negator, cuddled up right next to the search term

- title:moby -dick
- ti:moby -dick
- "title:moby – dick" without cuddling just treats the hyphen as a search term (that gets normalized away)

You can combine the search terms by using && as an explicit Boolean AND operator. The working syntax is:

- ti:midsummer && au:-shakespeare

to search titles for "midsummer" and search authors that do not contain "shakespeare"

Staff Catalog Versions

An older version of the staff catalog is available at [Cataloging > Staff Catalog \(Traditional\)](#). Email the helpdesk for more information

Search Preferences

Search Preferences for your workstation can be set in the catalog display.

The screenshot shows the 'Search Preferences' section of a catalog interface. At the top, there are tabs for 'Keyword Search', 'Numeric Search', 'MARC Search', 'Browse', and 'Shelf Browse'. Below these are search filters: 'All Formats' (set to 'Keyword'), 'Contains' (set to 'beuys action'), and 'Sort by Relevance'. There are also checkboxes for 'Limit to Available', 'Group Formats/Editions', and 'Results from All Libraries'. A search bar at the top right contains 'WEST' and buttons for 'Search' and 'Reset'. The 'Search Preferences' section includes:

- Default Search Library:** A text input field containing 'WEST'. Description: 'The default search library setting determines what library is searched from the advanced search screen and portal page by default. Manual selection of a search library will override it. One recommendation is to set the search library to the highest point you would normally want to search.'
- Preferred Library:** A text input field containing 'DOB'. Description: 'The preferred library is used to show copies and URIs regardless of the library searched. One recommendation is to set this to your workstation library so that local copies show up first in search results.'
- Default Search Pane:** A dropdown menu set to 'Keyword Search'. Description: 'Focus this search tab by default when opening new catalog pages.'
- Search Results Per Page:** A text input field containing '50'. Description: 'The number of search results to display per page.'
- Exclude Electronic Resources:** An unchecked checkbox. Description: 'Add the 'Exclude Electronic Resources' checkbox to the main search form.'

A blue 'Return' button is located at the bottom left of the preferences section.

Alternate Searches

Click a tab at the top of the search box to search by different parameters.

Numeric

A dropdown menu for numeric searches with the following options: ISBN, UPC, ISSN, LCCN, TCN, and Item Barcode. The 'ISBN' option is currently selected and highlighted in blue.

Browse

The 'Browse' search interface shows tabs for 'Keyword Search', 'Numeric Search', 'MARC Search', and 'Browse'. The 'Browse' tab is active. Below the tabs, there is a 'Browse for' dropdown menu set to 'Title', followed by the text 'starting with' and a 'Browse for...' input field. A dropdown menu is open below 'Browse for', showing options: Title, Author, Subject, and Series. The 'Title' option is selected and highlighted in blue.

MARC

The 'MARC Search' interface shows tabs for 'Keyword Search', 'Numeric Search', 'MARC Search', and 'Browse'. The 'MARC Search' tab is active. Below the tabs, there is a 'Tag' input field, a 'Subfield' dropdown menu, and a 'Value' input field. There is also a checkbox for 'Results from All Libraries' and a plus sign icon to the right.

Shelf Browse

The 'Shelf Browse' search interface shows tabs for 'Keyword Search', 'Numeric Search', 'MARC Search', 'Browse', and 'Shelf Browse'. The 'Shelf Browse' tab is active. Below the tabs, there is a 'Browse Call Numbers starting with' label and a 'Browse Call Numbers...' input field.