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Introduction

The Enterprise Searching training guide is designed to provide a basic understanding of how to search for items in the library’s catalog. Topics include searching for materials, adding and removing limits to searching, performing actions such as placing holds, managing user account information, creating custom lists of items, and how information is mapped within Enterprise.

This guide can accompany instructor-led training. It can also be used as review, reference or an independent study document.

The Enterprise Searching training guide comprises seven sections. Below is a short summary of each:

- **What is Enterprise.** Discusses the requirements of Enterprise for Horizon and SirsiDynix Symphony users, the two indexes within Enterprise, and fuzzy searching.

- **Searching.** Reviews the options of searching in Enterprise, the hit lists that appear when searching, accessing book lists, and content. It also covers how to place holds, add items to My List, email and print item information.

- **Using Facets.** Outlines the types of facets in Enterprise and the different aspects of the facets available such as adding and removing search limits, showing only available items, and downloading Gutenberg eBooks.

- **Detailed Display.** Discusses the field available in a detailed display, how to place a hold, read a review, write a review, federated search sources, and how to subscribe to search results (RSS feed).

- **My Account.** Reviews the features available in My Account of Enterprise such as accessing information about personal information, checkouts, holds, and fines.

- **My Lists.** Outlines the steps to creating, moving, copying, managing and removing My Lists in Enterprise.

- **Field Mapping.** Reviews what is indexed, what displays in the hit list, existing facets, what displays in the detail results and the source of data.
Using This Training Guide

This guide has been designed for use during a SirsiDynix instructor-led training. It also has been designed to be used as a reference work for the class. Icons are used throughout the manual for different purposes. The purpose of each icon is described below.

- This icon denotes additional helpful information.
- This icon is a warning. Pay special attention to this information!
- This icon indicates reference information available in another manual or to another chapter within this manual.
- This icon directs you to the SirsiDynix Symphony online Help file where you can find additional or related information.

Help Files

Enterprise comes equipped with a simple Help file that you can access. This Help file is a one-page document and is designed to provide helpful hints to guide you in your searching, and includes the following topics:

- Finding my way around
- Using the library catalog Home page
- Searching for items
- Working with search results
- Limiting search results
- Viewing the details of an item
- Using My Account
- Using My Lists
- Placing Holds
- Using the Select an Action feature
Click the question mark icon found at the top right corner of the Enterprise interface to access the help files.
What is Enterprise?

Enterprise is a simple-to-use faceted search product that becomes the foundation for a range of “user experience” solutions, featuring fuzzy search technology, highly efficient search index updating, intuitive user interfaces, powerful finding aids, consortia support, and deep integration with SirsiDynix integrated library systems.

All searches are general keyword searches, whose results can be filtered quickly, using pre-defined facets, to find the needed results. It is a powerful web-based front end to your ILS that can be easily entered into any webpage.

Enterprise allows users to search the library’s catalog as well as other resources. Searches can be entered with or without limits. Additional search options are available with an advanced search and refined searching can be accomplished with facets.
The common facets Enterprise provides for narrowing search results are:

- Author
- Subject
- Format
- Material Type
- Language
- Item Type
- Library
- Publication Date (Range or Year)

**Technical Information**

Enterprise integrates directly with the SirsiDynix Symphony ILS using Symphony Web Services. It requires Horizon Information Portal (HIP) and Horizon Web Services, however, to integrate with the Horizon ILS.

If you are running SirsiDynix Symphony, you must also install Symphony Web Services 3.1 on the ILS server to use Enterprise 4.1. If you are running SirsiDynix Horizon, you must install Horizon Web Services 1.0 to use Enterprise 4.1.

Your ILS and OPAC software must meet these minimum requirements and depending on these requirements, functionality differs. It is always most desirable to be on the latest ILS, OPAC, and Web Services versions to take fullest advantage of the product. The table below describes the major differences:

<table>
<thead>
<tr>
<th>ILS/Version</th>
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<th>Web Services</th>
<th>Functionality Included</th>
</tr>
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<tbody>
<tr>
<td>SirsiDynix Symphony 3.3.1</td>
<td>N/A</td>
<td>Symphony WS 3.1</td>
<td>• Integrated My Account</td>
</tr>
<tr>
<td>PC2 or higher</td>
<td></td>
<td></td>
<td>• Show Only Available (MSSQL or ORACLE ILS only)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Volume-level holds</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Place holds from the hit list</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Integrated Advanced Search</td>
</tr>
<tr>
<td>Horizon 7.5 or higher</td>
<td>HIP 3.x</td>
<td>Horizon WS 1.0</td>
<td>• Place holds – Links the user out to HIP</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Item availability – Can be configured with an instance of</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Horizon Web Services</td>
</tr>
</tbody>
</table>
Indexing

There are two types of index builds and rebuilds on Enterprise: “full” and “delta.” A full index build or rebuild creates or recreates the Enterprise index from scratch. Delta indexing occurs approximately every 15 minutes and only applies to records that were added, deleted, or modified since the last delta index. These more frequent rebuilds keep your Enterprise searches current with your ILS database.

Enterprise allows you to use the most current index while it is building or rebuilding a new index. This means that Enterprise can be used while indexing is being performed.

Enterprise is able to index MARC 21 and UNIMARC formats. For a complete list of tags and subfields that are indexed and displayed in MARC 21 and UNIMARC formats, refer to Field Mapping at the end of this document.
**Fuzzy Searching**

Enterprise uses SOLR/Lucene to make searching more powerful. As content is uploaded to Enterprise, SOLR/Lucene breaks up the content into smaller segments called n-grams. For example, the term ENTERPRISE could be broken down into these n-grams: ENT NTE TER ERP RPR PRI RIS E. N-grams are not necessarily always in 3-letter segments as in the given example. This information is then indexed. Searching n-grams will return many false hits. SOLR/Lucene then uses relevance ranking to display those hits that most closely match for what you are searching.

This use of n-grams and relevance ranking provides several advantages. Among these are the following:

- Handling of misspelled words. For example, searches for ‘chaikowsky’ will return hits for ‘Tchaikovsky’.
- Varying forms of searched terms. For example, a search for ‘compute’ returns hits with compute, computer, computing, computation, and other similar words.
- Ranking of results. Results that most closely match the search terms (highest relevance ranking) are shown first.

Because of the n-grams used for fuzzy searching, exact match searches might bring back multiple results that are not all exact matches. However, the record you are looking for should be the one with the highest relevance. If this is a concern, you can perform Exact searching in Enterprise 4.1 using the Advanced Search feature.
Searching

Enterprise searching is designed to model the characteristics of popular search engines used by the general public. These search engines do not typically require the user to designate a particular type of search (author, title, subject, series, etc.).

Likewise, search engine users don’t worry about the order of the terms they enter. They expect ‘King Stephen’ and ‘Stephen King’ to return the same results. Search engine users also expect that the most common or popular results will display at the top of the list. Enterprise meets all of these expectations.

**Before You Begin**

**Language Preference**

When preparing to execute an Enterprise search, users are able to select their preferred language.

Although libraries can create additional languages to display, four languages are currently available:

- English
- French
- Spanish
- German

Libraries can determine which languages they want to make available, and which language should be the default.

Once a user logs in, the language you select as your default language in the My Account preferences will become the interface display language automatically.
**Library Catalog Home Page**

The library catalog Home page allows users access to any content the library has configured, such as library announcements, links to websites, etc.

**Book Lists**

Enterprise provides users with the option of searching for titles based on popular book lists generated from New York Times best seller lists and SirsiDynix Symphony reports.

View titles associated with specific book list using the book list menu.

Any title selected will display information, like author, publication date, ISBN, etc. For some titles, users can click links to more information, such as a book review or an excerpt.
Users can also search for a given title from the book lists by clicking the Find in My Library button.

**Searching for Items**

In Enterprise the library can apply search limits before executing your search. For example, a limit based on library or language may be put into place. Search limits are very similar to search facets, but with limits, you are adding a search qualifier before you begin the search.
Limit by Library

A library can determine for itself whether or not to allow Limits by Library. When Limit by Library is enabled, users can select which library’s results they wish to view by selecting the desired library from a pull-down list. Entries in the list can be single libraries or groups of libraries. Local administrators are able to determine which libraries and groups of libraries appear in the selection list:

![Enterprise Search Interface](image)

Search Suggestions with Blacklist (Auto-Complete)

As a user enters a search term in the Enterprise Search field, a list of likely terms is displayed. This is much like the auto-complete feature common to web browsers, except that the terms do not come from previous searches done on your computer. Instead, the list is made up of search terms that have successfully returned results at least three times in the last ten days.

If there are any search terms that the library does not want to be suggested, even though they may have successfully returned results three or more times in the past ten days, administrators can add these terms to a ‘blacklist’ of terms. Blacklisted items do not display. Enterprise comes with a default set of blacklisted terms that library administrators can add to or delete terms from as desired.
Search Suggestion Option

To use the Search Suggestion option:

1. Begin entering your search term.
2. When the list of search suggestions appears, select an appropriate search term from the list.
3. If the search results do not appear, click Search.

The search executes the same as if you had entered the term completely:
Performing a Search

There is a single location to enter search terms. Although you can designate the type of term with the Fields drop down (title, author, subject, etc.) you are not required to indicate the type of term when searching.

After entering the desired search term, click the **Search** button to execute the search and return the resulting hit list.
Modifying a Search

To modify and re-execute the search, simply add or take away from the original search term entered in the search window and click **Search** again.
Starting Over

To clear the current search terms and begin a new search, click the Home icon.

Advanced Search

Enterprise offers the option to have greater control over the results of your search by using the Advanced Search option located at the end of the navigation toolbar.

When using the Advanced Search feature, you can have Enterprise perform a search based on the following options:

- Find items that have all of the specified words or the exact phrase used.
- Do not show items that have the specified terms.

Find items that have:

- All these words:
- This exact phrase:

Don't show items that have:

- These unwanted terms:

- Limit the search by format type, language, and/or library.

Don't show items that have:

These unwanted terms:

Additional limits:

- Format type: Any Format
- Language: Any Language
- Library: Any Library

- Find □ Don't show Title:
- Find □ Don't show Author:
- Find □ Don't show Subject:

- Only Show Available

- Find or do not show items based on a specific title, author and/or subject.

Don't show items that have:

These unwanted terms:

Additional limits:

- Format type: Any Format
- Language: Any Language
- Library: Any Library

- Find □ Don't show Title:
- Find □ Don't show Author:
- Find □ Don't show Subject:

- Only Show Available

- Only show available items (Symphony only feature).

Don't show items that have:

These unwanted terms:

Additional limits:

- Format type: Any Format
- Language: Any Language
- Library: Any Library

- Find □ Don't show Title:
- Find □ Don't show Author:
- Find □ Don't show Subject:

- Only Show Available
• Select specific search target and limits (e.g., PDF documents, books only).

For example, you have just finished reading “The dark tower” by Stephen King and you want to see what else might be available to check out by the same author.

To perform an Advanced Search:

1. Click Advanced Search in the navigation toolbar.

2. Enter “The dark tower” into the Title field.

3. Select the Don’t show button associated with title field.

4. Enter “Stephen King” into the Author field.

5. Select the Only Show Available checkbox to limit the search results by availability.
6. Click **Advanced Search** at the bottom of the screen.

**Library Favorites**

Libraries are able to select websites that they want to have included in Enterprise searches. Searches that find hits on Library Favorite websites calculate a relevancy rank, just as with other hits, and display the websites in the hit list with other hits. When users select a Library Favorites hit from the hit list, they are taken directly to that website.
Additional Searching Features

Did You Mean

When a user enters search terms in Searching, their terms are compared against a server-specific dictionary created solely based on the content indexed into Enterprise. If you enable this feature, then for each search that the patron performs, Enterprise consults this dictionary and Searching displays the "Did You Mean?" phrase with alternative search terms suggested by the dictionary.

Boolean

All terms are considered when searching in Enterprise, including those typically limited to use as Boolean operators. This means that you can search for titles that may not always retrieve expected results in other systems because of a Boolean operator. A sample title would be ‘Bud, not Buddy.’
Diacritics

Enterprise treats search terms with diacritics differently than search term counterparts without diacritics. For example, the number of results associated with the search term “El Niño” may differ than the number of results associated with the search term counterpart “El Nino.”

Furthermore, SOLR Lucene takes diacritics into account when determining how relevant a particular title is when compared to the search term. In other words, diacritics can affect where a title is placed on the hit list.

Enterprise ignores all other punctuation and capitalization.

Working with Search Results

The search results or hit list contains a list of all title or bibliographic records that were found matching your search terms based on a set level of relevancy. The results do not contain information about the item records. In other words, Enterprise selects titles to display in the hit list based on how closely they are related to the search term. The administrator sets the level of relevancy in the admin console.
Display Options

Enterprise offers three different display options when viewing search results: List view, Thumbnail view or CoolIris view.

List View

The List view is the view with which most people are familiar; it is a more traditional view. For this reason, Enterprise is set up to initially display the hit list in the list view. This view allows users to view general information about the titles associated with the current hit list, and includes content such as title, author, publication date, and summary, depending on how the administrator configures the search results display in the admin console. This view will also oftentimes display the cover art associated with the title and a format icon.
Thumbnail View

The Thumbnail view emphasizes different title features than the List view. This view focuses on the cover art of the titles in the search results and displays the title and author.
**CoolIris View**

The CoolIris view provides users with a completely different viewing experience than the other views. After clicking the CoolIris View icon, a new window appears initially displaying the cover art for the various titles associated with the search results.

By placing the cursor over the cover art, the title appears.

Additional cover art can be viewed by using one of the following three options:

- Click and drag the CoolIris view screen with the mouse to scroll through the various titles. When you do this, the view of the cover art is tilted illustrating that the display is actively changing.
• Click and drag the scroll bar at the bottom of the CoolIris view screen. The same tilted effect occurs as with the previous CoolIris viewing method.

• Click the left- or right-facing arrows on the sides of the CoolIris view window. Again, the same tilted effect occurs as with the previous CoolIris viewing methods.
The CoolIris view, provided by CoolIris, also comes with the social networking site icons of Facebook ® and Twitter ®, where you can connect to these associated websites.

Although the CoolIris view window does not display in full-screen mode by default, you can expand it to display in full-screen mode clicking the appropriate icon.
A similar icon in the same location of the screen allows you to exit the full-screen mode.

When you click one of the cover art images, you get a close-up view of the cover art, and as you place the mouse over the cover art image in the close-up view, you are able to view the title and author. This close-up view also provides Facebook ® and Twitter ® icons.
From this close-up view you have two options to scroll through the hit list:

1. Click the left- or right-facing arrows.

2. Click the Start Slideshow icon which automatically advances you through the hit list, one title at a time.

A similar icon in the same location of the screen allows you to exit the slideshow.
To view the item details of the selected title, click the **Open this Item’s Page** icon, or to return to the standard CoolIris view, click the **Close** button.

To close the CoolIris view altogether and return to either the List view or the Thumbnail view, click the **Close** button (black X) in the top-right corner of the CoolIris view window.
Order of Search Results

Search results display in order of relevance, with the hits that most closely match your search term at the top. Relevancy, however, is determined by several factors: 1) fuzzy search factor, 2) relevant field boosts, 3) search term in title field, and 4) how closely the search term is aligned with the content in the search fields.

The fuzzy search factor indicates how ambiguous the search result is compared to the search term, and it’s based on a rating scale between 0.5 and 1.0; the closer the search result is to the score 1.0, the less ambiguous the search result is. The administrator sets the fuzzy search factor minimum level when configuring the search profile.

| Fuzzy Search Factor (0.5 to 1.0): | 0.7 |

Field boosts provide the administrator with a way to control how search results are ranked within the hit list. In other words, the administrator can add an extra boost to a given title so that the title appears closer to the top of the hit list than when the field boost is not available. For example, if the administrator sets up a field boost for an author of the bib record’s main author field, and the search term includes the name of an author found in the bib record’s main author field of a bib record, that particular record receives a boost and displays closer to the top of the list than other records without a field boost.

| First Author value, f | Boost Value: 500.0 |

Titles that include the search term as part of the title are considered to be more relevant than titles that have the search term as part of another field in the bib record, including author. Therefore, these more relevant titles naturally display closer to the top of the hit list than do titles that have the search term in other fields.

Furthermore, the relationship between the search term and content in the search fields also determines how closely to the top the title is. For example, if you’re looking for the title “Soccer techniques in pictures,” the search term ‘soccer techniques’ is more relevant than the search term ‘soccer’ because the former search term is more closely related to the actual title than the latter search term.
Enterprise displays ten titles per hit list page. When there are more items in the hit list than fit on one page, users can use the <, #, or > links found at both the top and bottom of the hit list to move to other pages in the hit list.

Contents

The administrator can customize the search profile—a specific Enterprise interface an audience uses to search for records—by specifying which fields display in the hit list. Although the administrator may select a particular field to display (e.g., summary), the content of that field will only display if the record has been catalogued accordingly. The following fields are commonly displayed in a hit list:

- Title
- Author
- Publication Date
- Summary
- Library
- Format Icon
• Excerpt
• Enhanced Content Cover Art
• Electronic Resource link (from 856 tag)

Most of these fields display as seen in the example below:

Enterprise highlights the search term in yellow in the display of a title to show how this title relates to the original search term.

Fields that has too much information to display on the hit list will display ‘More…’ at the end of the field.
Format Icon

To help users quickly and easily determine the type of materials within the search results, format icons display. If the user is unable to determine what the icons represent, hovering over the icon with the mouse displays the alt tag to clarify the format.

For detailed information about how formats are derived from MARC 21 (007 tag) and UNIMARC bibliographic records, refer to the Field Mapping at the end of this document.

Enhanced Content

If the library has a subscription to Syndetic Solutions’ enhanced content product, Enterprise can be configured to display cover art and other information about the title such as reviews, author notes, summaries, tables of contents, excepts, etc.
To access enhanced content, click the title or the picture of the item to go to the detailed display screen. The enhanced content is shown on the left in the detailed display screen.

**Details**

**Title:** William Shakespeare
**Author:** Shakespeare, William, 1564-1616
**Physical Description:** 40 p.: col. ill. ; 21 cm.
**Summary:** Introduces the poetry of William Shakespeare through a sampling of sonnets and excerpts from his plays.

**Available:** 1

**Link to Details**

Click the hypertext title link or the enhanced content image to access the detailed display information for the title.
The detailed display screen contains more bibliographic and item specific information, as well as a link to the item in the OPAC. The details screen (shown below) is discussed on page 57 of this training guide.

---

**Available:**

<table>
<thead>
<tr>
<th>Library</th>
<th>Material Type</th>
<th>Item Barcode</th>
<th>Shell Number</th>
<th>Copy</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mewers</td>
<td>Book</td>
<td>3107000484962</td>
<td>NEXT JUN 2023</td>
<td>1</td>
<td>Standard shelving location</td>
</tr>
</tbody>
</table>

---

**Summary**

**Reviews 2**

**Google Preview**
Selecting an Action

The Select an Action feature allows users easy access to a variety of actions within a set of search results. These options include placing a hold, adding items to My List, emailing item details and printing item details.

To perform an action:

1. Enter your search term into the search field and click Search.

2. Select the check box next to the title(s) of interest.
3. Click the **Select an Action** button at the top of the hit list.

You also have the option of selecting the checkbox beside the **Select an Action** dropdown menu which allows you to select every displayed title in the hit list before performing an action.

**Place Hold(s)**

Enterprise offers the option to place title-level holds—a hold on any copy record under a given title. Within the search results, users are able to place a hold on a single title or against multiple titles in a search results list.

**To place a hold on multiple titles:**

1. Enter your search term into the search field and click **Search**.
2. Select the check box next to the titles of interest.
3. Click the **Place Hold(s)** option from the **Select an Action** menu.

Enterprise will prompt SirsiDynix Symphony users to log into Enterprise at this point if you haven’t yet logged in. For Horizon users, you will be redirected to HIP where you will log in to continue placing the hold.

4. Select the pickup library in the drop down menu if needed.
5. To continue, click **Place Hold**.

6. In the confirmation window that appears, click **OK**.

You are placed back in the hit list.

**To place a hold on a single title:**

1. Enter your search term into the search field and click **Search**.
2. Select the check box next to the title of interest.
3. Click the **Place Hold(s)** button associated with the title of interest.
4. Select the pickup library in the drop down menu if needed.
5. To continue, click **Place Hold**.
6. In the confirmation window that appears, click **OK**.
Add Items to My List

The My List feature enables users to generate a list of titles which can be viewed at a later time.

**To add items to My List:**

1. Enter your search term into the search field and click Search.
2. Select the check box next to the title(s) of interest.
3. Click the Add to My Lists option from the Select an Action menu.

A confirmation window appears indicating that the items were added to the list Temporary List (if not logged in) or to the configured default list (if logged in).
For further information about My Lists, refer to the My List section on page 97 in this training guide.

Email Item Information

Enterprise offers users the opportunity to email item details for the titles selected within search results. Emails can be sent in plain text or HTML format. In HTML format, links retain their hypertext capabilities to go to whatever location they would have gone to if the link had been executed from within Enterprise.

T o e m a i l i t e m i n f o r m a t i o n :

1. Enter your search term into the search field and click Search.
2. Select the check box next to the title(s) of interest.
3. Click the Email option from the Select an Action menu.
4. Enter the appropriate email address into the Email Address field provided.
5. Select the appropriate checkbox to send the email in a plain text format instead of an HTML format.

6. Click Send Email.

7. In the confirmation window that appears, click OK.

Emails of hit lists sent in HTML format include titles that function as hypertext links, taking the user to the full bibliographic record when clicked as seen below:
Emails of search results sent in plain text format contain the same information and layout as HTML emails, without hypertext links as seen below:

Title Twilight
Author Meyer, Stephenie, 1973-
Publication Date 2005
Summary: When seventeen-year-old Bella leaves Phoenix to live with her father in Forks, Washington, she meets an exquisitely handsome boy at school for whom she feels an overwhelming attraction and who she comes to realize is not wholly human.
Format: Books

Title New moon
Author Meyer, Stephenie, 1973-
Publication Date 2006
Summary: When the Cullens, including her beloved Edward, leave Forks rather than risk revealing that they are vampires, it is almost too much for eighteen-year-old Bella to bear, but she finds solace in her friend Jacob until he is drawn into a "cult" and changes in terrible ways.
Format: Books
Print Item Information

Printing item information may also be done with the Select an Action option.

To print item information:

1. Enter your search term into the search field and click Search.
2. Select the check box next to the title of interest.
3. Click the Print option from the Select an Action menu.

![Print option in select an action menu]

The item information appears in a new web browser window.

![Browser window with search results]

4. Use the browser’s print functions to print the item information displayed from the hit list:
Where the Internet continues to evolve from a place of information to a place of social interaction, many users like to stay connected to popular social networks. Enterprise offers you the opportunity to connect to Facebook® directly from the search results that display in the hit list based on administrative configuration settings. For every title found on the hit list, you will see two Facebook® icons: an icon illustrating the number of library patrons who “like” a given title and a separate “Like” icon allowing you to indicate on your Facebook® page that you “like” a given title.

To “like” a title:

1. Enter your search term into the search field and click Search.

2. Click on the Facebook® icon associated with the title of interest within the hit list.

3. Log into Facebook® using your Facebook® account information in the new window.
These same steps would also apply if you were viewing the item detailed display.
Facets in Enterprise allow users to limit and refine their searches. Within a search results list, facets appear at the left side of the screen.

Types of Facets

The following are common facets within Enterprise:

- Author
- Subject
- Format
- Item Type
- Language
- Library
- Publication Date (Range or Year)
Hit Count

Except for Item Type and Library, each facet listing has a number following it indicating how many of the results in the current search results relate to that category:

Limiting Search Results

For each facet, the 5 most prolific categories are displayed with the most prolific one on top. For example, if a search renders results with 56 titles associated with the format category Electronic Resources and 145 titles associated with the format category Book, the Book category will appear before the Electronic Resources category.
If there are more than 5 categories for any facet, a **More** link appears at the bottom of the list of categories under that facet. If the category list for any facet is large enough, an **Expand All** link also displays beneath the **More** link.
Likewise, by clicking on the **Expand All** link, you can see all categories associated with that facet.
To return to the abbreviated list of just the top 5 categories in a facet, click the **Collapse All** link at the bottom of the list.

**Using Limits**

Clicking on any of the facet listings reduces the search result total to contain only those records that include the facet criteria.
To select multiple options within the same facet, select the appropriate check boxes and click **Include**. You may also click **Exclude** to exclude facets.

Multiple facets (e.g., author and subject) can also be selected to refine your search results.

Remove any selected facet by clicking the **Close** button next to the appropriate facet under the Narrowed By section.
Removing Limits (Narrowed by)

To remove a facet from your list of limits, click the ✗ in front of the appropriate facet.

To remove all facets being used to limit the hit list entries, click Clear all at the top of the facet list.
Only Show Available

SirsiDynix Symphony users have the option of having Enterprise display only items in the hit list that are considered available for checkout at the time of display.

Click the **Only Show Available** button to prompt Enterprise to display available items associated with the ILS.

Click the **Include Unavailable** button to return to all results in the hit list.
Publication Date

Enterprise offers the option to view the data related to the publication date facet as a bar graph in addition to text format.

You can toggle between the two formats by clicking the **Years/Graph** buttons.
While in the bar graph format, you have the option of either sliding the date range bars or filling in the date range fields to narrow the date range before refining your search.

**Gutenberg eBook**

Enterprise displays items included in the Gutenberg eBook project that are available for download in a digital format without cost to the user.

**To download a Gutenberg eBook:**

1. Enter your search term into the search field and click **Search**.
2. Limit the search results by including electronic resources as a Format facet.
3. Click the **Download E-book** link under the appropriate title within the search results page.

There may also be titles that display in the search results that are NOT part of the Gutenberg eBook project but have links that allow users to purchase digital copies of a given title.
4. Select the appropriate format to download the Gutenberg eBook in the new window.

5. Follow the instructions provided based on the format selected to finish the downloading process.

To return to the search results without downloading the eBook, click Close.
Detailed Display

As the name suggests, Detailed Display provides additional information about an item in your search results. In the detailed display screen, users can see the following:

- More bibliographic information than was displayed in the hit list.
- Copy/item level information.
- Options to execute new searches based on authors or subjects related to that title.
- A link to the OPAC to check availability and/or place holds.
- Links to enriched content.

Detailed display information is accessed by clicking either the title or the cover image within the hit list.
Fields That Display

The following fields can be seen in a detailed display:

- ISBN
- Personal Author
- Corporate Author
- Conference Author
- Uniform Title
- Title
- Edition
- Publication Info
- Physical Description
- Series
- Series Title
- General Note
- Contents
- Abstract
- Reading Level
- Program Info
- Local Note
- Personal Subject
- Corporate Subject
- Conference Subject
- Title Subject
- Subject Term
- Geographic Term
- Genre Term
- Added Author
- Added Corporate Author
- Added Conference Author
- Added Uniform Title
- Added Title
- Electronic Access
- Item/Copy Level Information

**Author/Subject Link Searching**

When the available author or subject heading hypertext links within the detailed display are selected, Enterprise launches an entirely new search for all bibliographic records associated with that author or subject.
Item Availability

Whether you are a Horizon or SirsiDynix Symphony customer, you can see the availability of items in Enterprise from the search result display.

By clicking on the title or cover art, the number of items available display as well as the current location/status of specific items.

Enterprise also displays library, call number, and item type information for each library that owns any copies of the title.
Place a Hold

In the item detailed display, users can place a title-level hold on the item selected. Although the process for placing holds is provided earlier in this training guide, the instructions below are useful to place a hold while viewing the item details.

To place a hold in Detailed Display:

1. Enter your search term into the search field and click Search.
2. Access the detailed display for the item of interest.
3. Click Place Hold on the right side of screen.

Enterprise will prompt SirsiDynix Symphony users to log into Enterprise at this point if you have not yet logged in. For Horizon users, you will be redirected to HIP where you will log in to continue placing the hold.

4. If necessary, select the pickup library in the drop down menu.
5. Click **Place Hold**.

6. In the confirmation window that appears, click **OK**.
   
   You are placed back in the hit list.

   For SirsiDynix Symphony users, refer to the My Account section on page 77 in this training guide to learn how to manage the holds already placed.
Previous Record/Next Record/Return to Results

The links to view both the details of the previous and next records are found to the sides of the Detailed Display screen in the form of arrows. This design makes it easy for users to move from record to record without having to return to the search results each time. When you want to return to the hit list, the black X button closes the Detailed Display window.

Reviews in Enterprise

With Enterprise, libraries are able to subscribe to ChiliFresh’s Write a Review service. With this service, users are able to read reviews written by other users and even add their own reviews. This is similar to the reviews found on many on-line shopping services. Library administrators are able to monitor new reviews and block or delete any as needed.

When the Read or Write a Review option is enabled, searches will return one of three options:

- A link to view a review
- A link to write a review
- Nothing (occurs when the listing does not have a valid ISBN)
Reading a Review

To read reviews written by others:

1. Click on the link under Reader Rating that indicates how many reviews are available.

2. Reviews appear in line with entries in the hit list. Use the inner scroll bar to see the review(s).
3. While looking at the review, you have the following options:

- Close Reviews by clicking on the **Close Reviews** link.
- Sort Reviews by using the pull-downs or option window.
- Add Reviews by clicking on the **Add a Review for this Link**.
- Jump to page by using the pull-down Jump to Page option window (found at the bottom of the inner page, not shown in screenshot below).
Writing a Review

To write a review:

1. Click the Add a Review for this Link while viewing existing reviews, as explained above.

2. Users who are not registered are able to register by clicking the Register Here link.

You must be registered and enter your email address and password to complete a review.
3. Once registered and logged in a library user can do any of the following:
   
   - Give a 1-5 ranking
   - Title a review
   - Add comments
   - Check whether or not you would recommend it to a friend
4. Click the **Add Review** button to send the review for processing.

**Federated Search Sources**

A federated search source is a collection of settings that connect to a federated search provider, and define how to interpret the data that is returned from a federated search source. For example, you might have a federated search source that connects to EBSCO, a third-party content provider.

A search source may have one or more search targets associated with it. Search targets define the how to interpret the data that is returned from a federated search source. Using the Enterprise admin console, the administrator can add, edit, or delete a federated search source or its associated search targets.

Below is an example of using the federated search source functionality to create a Z39.50 connection to the Library of Congress.

**To create a Z39.50 connection using Federated Search sources:**

1. Using the Limits drop down, select Library of Congress as the search target on the Home page.

2. Enter your search term into the Search field.
3. Click **Search**.

Enterprise displays the results from the federated search source only in a List view. A limited amount of information, as compared to titles found within your connected ILS, is listed on the hit list.

When you perform an “Everything” search where no particular search target or search limit is selected, Enterprise immediately displays all records connected to discovery search targets. You can have Enterprise display all records connected to federated search targets by clicking the following button found in the top-right corner of the hit list:
Rooms Content

All sites using Enterprise 3.0 (or later) have the ability to create content using Rooms. This content might include text, images, sound clips or links to other websites. Additionally, this content can be indexed for searching.

To search content within a room:

1. Enter a search term in the Search field.
2. Using the Limits drop down, select “Rooms Content Search” as shown below:
3. Click **Search**.

4. Select the Room of interest from the hit list to access the content searched.
**Discovery Search Sources**

A discovery search source is a collection of data imported and indexed into Enterprise. Examples of discovery search sources can range from your ILS database content, Rooms content, Library Favorites content, or loaded PDF documents. These search sources provide a broader search scope beyond conventional materials found in other OPAC systems.

Just like searching federated sources, you can limit your search to only retrieve results from the Discovery search sources. You may also perform an “Everything” search and find results from the Discovery search sources included. Below is an example of searching just PDFs.

![Example of Searching PDFs](image)

Clicking on a title will take you to the PDF.
**Subscribe to Search Results**

Enterprise allows you to save any of your Enterprise searches as an RSS feed so you can quickly and easily see updated results of these searches through their RSS reader.

**To subscribe to search results:**

1. Perform the search you wish to save as an RSS feed.

2. At the top of the search result hit list, click the **Subscribe to Search Results** link.

The steps from here on are application dependant. For this example, we are using Internet Explorer. In other browsers and RSS applications, the steps will be similar, but different.

3. Click the **Subscribe to this Feed** link.
4. If desired, edit the name for the feed, and select where you want the feed.

5. Click the **Subscribe** button.

6. Click **Close** button on the window displaying the confirmation message.

The RSS Feed link will display among other feeds in the web browser.
7. Click the recently added RSS feed to access the feed. The example below is for reading the RSS feed using an Internet Explorer browser.

8. Click on a title to go to the full bibliographic detail screen for that record.
My Account

The My Account option in Enterprise allows SirsiDynix Symphony users to access information regarding personal information, checkouts, holds and fines for themselves and others associated with their group of users.

Accessing My Account

To access My Account:

1. Click My Account in the toolbar at the top of the screen.

   Enterprise will prompt you to log into Enterprise at this point if you haven’t yet logged in.

   When logged in, you will see your name at the top of the screen to the left of the Login button.

2. Select the tab/accordion of interest in the new screen to view specific information.
Personal Information

Users can access and manage several pieces of information on the Personal Information tab: contact information, PIN, Enterprise user preferences, other group members associated with a user group in SirsiDynix Symphony.

Contact Information

On the Contact Information accordion, users will see only the information associated with the primary address declared in a user record in SirsiDynix Symphony. In other words, if they have two addresses, and if the system designates the second address as the primary address, they will not see the first address.

Change PIN

This accordion allows users to modify your established PIN in SirsiDynix Symphony. If a user changes the PIN in Enterprise, those changes will be immediately seen in SirsiDynix Symphony.

To change your PIN:

1. Open the Change PIN accordion on the Personal Information tab in My Account.
2. Enter your current PIN into the Current PIN field.
3. Enter your new PIN into the New PIN and Confirm New PIN fields.
Preferences

The Preferences accordion allows users to set the four following preferences:

- Default language: The language you would like to view the Enterprise interface in when logged in.
- Default My Account tab: The tab you want to view first when opening My Account.
- Preferred List: The list to which you prefer to save items when adding items to My Lists.
- Keep My Checkout History: The setting that enables/disables your checkout history to be displayed on the Checkouts tab.

The Keep My Checkout History feature displays when:

- The Charge History Rule policy is turned on in the Symphony configuration files.
- The Allow Checkout History feature is turned on in the Enterprise administration console.
- The Charge History Rule policy in the user record is either set to All Charges or No Charges.

To set your preferences:

1. Open the Preferences accordion on the Personal Information tab in My Account.
2. Change settings as necessary using the drop down menus.
3. Select/deselect to keep your checkout history, if applicable.
4. Click Update.
Group Members

In the **Group Members** accordion, users will see information about all associated members of a user group, such as the member role, user ID and user name.

<table>
<thead>
<tr>
<th>Role</th>
<th>User ID</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Child</td>
<td>210000012</td>
<td>Lewis, Ken</td>
</tr>
<tr>
<td>Child</td>
<td>210000013</td>
<td>Lewis, Dorothy</td>
</tr>
<tr>
<td>Parent</td>
<td>210000014</td>
<td>Lewis, Lisa</td>
</tr>
</tbody>
</table>

This accordion only appears if you are a member of a user group set up in SirsiDynix Symphony.
Checkouts

Users can access and manage several pieces of information on the Checkouts tab: current checkouts, current checkouts to members of an associate user group, and checkout history.

My Current Checkouts

In the My Current Checkouts accordion, users can view all of the items currently checked out by title and author, the number of times each item has been renewed, and the due date for each checkout. They can also renew checkouts on this tab.
When items are overdue, Enterprise alerts users with a red exclamation mark on the **Overdue** tab and at the top of and beside each overdue title on the **My Current Checkouts** accordion.

**To renew your checkouts:**

1. Open the **My Current Checkouts** accordion on the **Checkouts** tab in My Account.

2. Select the items you would like to renew using the checkbox associated with the title of interest, or using the **Select All** check box.

3. Click **Renew**.
4. Click Yes in the Renewal Confirmation window that displays.

The new due date appears next to the checkouts renewed.
**Group’s Current Checkouts**

The **Group’s Current Checkouts** accordion is similar to the **My Current Checkouts** accordion except it displays items checked out to other members associated with a user group which are established in SirsiDynix Symphony. Users may also renew items checked out to other group members.

Enterprises alerts you when you cannot renew a checkout due to other holds placed against the checkout, as illustrated in the screen capture below.

You will not see the **Group’s Current Checkouts** accordion if you are not associated with any user group in SirsiDynix Symphony.
My Checkout History

This accordion allows users to see what titles you have checked out previously and the date the items were checked out and returned.

The My Checkout History accordion displays when:

- The Charge History Rule policy is turned on in the Symphony configuration files.
- The Allow Checkout History feature is turned on in the Enterprise administration console.
- The Charge History Rule policy in the user record is either set to All Charges or No Charges.
Holds

Users can access and manage several pieces of information on the **Holds** tab: current active holds and the holds associated with members within a user group.

**My Holds**

In the **My Holds** accordion, users can view all of the items currently on hold by title and author, the hold status, the pick-up library, the hold expiration date, and their position within the holds queue for a particular title.
Users can also cancel holds, edit the pickup library and suspend holds on this accordion.

Similar to the Checkouts tab, Enterprise alerts users on the Holds tab and at the top of and beside each title on the My Holds accordion with a green exclamation mark icon when any items are available for pick-up.
To manage place holds:

1. Open the **My Holds** accordion on the **Holds** tab in My Account.

2. Select the items you would like to manage using the checkbox associated with the title of interest, or using the **Select All** check box.

3. Click the button most appropriate for the situation: **Cancel Hold(s)**, **Edit Pickup Library**, or **Suspend Hold(s)**.

4. Follow the instructions within the various new windows that display. For example when suspending a hold, select the start date and end date for the hold using the calendar that appears.

5. Click **Suspend**.
Other appropriate windows display when you cancel holds or edit the pickup library.

For newly suspended holds, a calendar icon displays next to the holds that have been suspended, and if you place your mouse over the calendar icon, the suspension dates appear.
**Group Holds**

The *Group Holds* accordion is similar to the *My Holds* accordion except it is designated for displaying the holds associated with other members in a user group which are established in SirsiDynix Symphony.

<table>
<thead>
<tr>
<th>Title/Author</th>
<th>User</th>
<th>Status</th>
<th>Pickup at</th>
<th>Expires</th>
<th>Place in queue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clifford’s Thanksgiving Visit</td>
<td>Lewis, Ira Enidwell, Norman.</td>
<td>Active</td>
<td>E. A. Arrowood Foundation Library</td>
<td>12/20/11</td>
<td>3</td>
</tr>
</tbody>
</table>

You will not see the *Group Holds* accordion if you are not associated with any user group in SirsiDynix Symphony.

**Fines**

Users can access and manage several pieces of information on the *Fines* tab: accruing fines, current fines, accruing fines associated with other members of a user group, current fines associated with other members of a user group, and a payment history.

Unlike the previous two tabs, the *Fines* tab only has one red exclamation mark on the tab itself to alert the user to bills and fines they may owe.
**Accruing Fines**

This accordion lists the estimated amount of how much a user owes the library in terms of accruing fines. Fines will continue to accrue until the item is either renewed or checked in. At this point, the fine turns into a bill and can be paid.

**Current Fines**

The **Current Fines** accordion provides a list of bills associated with the user account. The bills listed here are current unpaid bills that differ from the accruing fines mentioned above. In this accordion, you may see the titles the bills are associated with, if applicable, the reasons for the bills, the individual and total amount due for each and all bills. The user may also see the available credit they have in their user credit account, if applicable.
**Group Accruing Fines**

The **Group Accruing Fines** accordion allows users to view the same things as the **Accruing Fines** accordion except this accordion is designated for displaying the accruing fines associated with other members in a user group which are established in SirsiDynix Symphony.

<table>
<thead>
<tr>
<th>Title</th>
<th>Estimated Fine</th>
</tr>
</thead>
<tbody>
<tr>
<td>Twilight</td>
<td>$0.75</td>
</tr>
</tbody>
</table>

**Group Fines**

The **Group Fines** accordion allows users to view and do the same things as the **Current Fines** accordion except this accordion is designated for managing the current fines associated with other members in a user group which are established in SirsiDynix Symphony.

<table>
<thead>
<tr>
<th>Title</th>
<th>User</th>
<th>Reason</th>
<th>Pay</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brown Rabbit's shape book</td>
<td>Lewis, Ken</td>
<td>Damaged material</td>
<td>✔</td>
<td>$7.50</td>
</tr>
</tbody>
</table>

**Paying Bills**

With some additional configuration, users may also pay current bills using your user credit account or PayPal.

**To pay for a bill using your user credit account:**

1. Open the **Current Fines** accordion on the **Fines** tab in My Account.
2. Select the bill to pay by clicking the **Pay** checkbox associated with the appropriate bill.
3. Click **Apply Credit**.

To pay for a bill using **PayPal**:

1. Open the **Current Fines** accordion on the **Fines** tab in My Account.

2. Select the bill to pay by clicking the **Pay** checkbox associated with the appropriate bill.

3. Click the **PayPal** icon.

4. If you already have a PayPal account: Click **Have PayPal account?**

5. If you do not already have a PayPal account: Fill out the fields under **Create a PayPal account**.
6. Click *Agree and Create Account*. 
**Payment History**

The **Payment History** accordion displays a history of paid bills—partial and full—on your personal user account whether payments were made in SirsiDynix Symphony or in Enterprise. This accordion lists the date and amount paid, but does not list the bill itself.

<table>
<thead>
<tr>
<th>Date</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug 1, 2011</td>
<td>$5.00</td>
</tr>
<tr>
<td>Aug 1, 2011</td>
<td>$1.54</td>
</tr>
<tr>
<td>Jun 30, 2011</td>
<td>$2.00</td>
</tr>
<tr>
<td>Jun 30, 2011</td>
<td>$5.00</td>
</tr>
<tr>
<td>Jun 30, 2011</td>
<td>$2.00</td>
</tr>
<tr>
<td>Jun 30, 2011</td>
<td>$0.54</td>
</tr>
<tr>
<td>Jun 23, 2011</td>
<td>$3.00</td>
</tr>
<tr>
<td>Jun 23, 2011</td>
<td>$5.00</td>
</tr>
</tbody>
</table>

**Total Paid**: $35.00
Summary Box

Users can quickly assess your account situation by glancing over at the information provided in the Summary Box. Here, you can see the user status, the user group status (if applicable), the number of personal overdue checkouts along with the total number of checkouts altogether, the number of available holds ready for pickup associated with the number of holds altogether, and the amount of fines currently owed the library.

Similar to the tabs recently discussed, the Summary Box also alerts users to various activities in their account with an exclamation mark.
My Lists

The My Lists feature in Enterprise enables users to generate a list of titles which details you can view at a later time.

Adding Items to My Lists

To add items to My Lists:

1. Enter a search term in the Search field and click Search.

2. Select the check box next to the title(s) of interest.

3. Click the Add to My Lists option from the Select an Action menu.
If you are logged into Enterprise, and you have created multiple lists on your My List account and have not designated a default list, Enterprise will prompt you select a list to which you would like to add the selected items.

You can also indicate in this same window to make the select list the default list.

A confirmation window appears indicating that the items were added to the list Temporary List (if not logged in) or to the configured default list (if logged in).

4. Click the **Close** button to close and return to the hit list.
Managing My Lists

When managing My Lists, users must first access the list(s) by clicking the My Lists link in the toolbar at the top of the screen.

Enterprise will prompt you to log into Enterprise at this point if you have not yet logged in.

When logged in, you will see your name at the top of the screen to the left of the Login button.

The titles associated with the Temporary list will be the first ones to display as Enterprise begins to display My Lists.
From this list, users have the option to perform several actions for selected title from the Select an Action button. The following are the actions available:

- Place a hold
- Save the Temporary list
- Delete selected titles
- Email
- Print
- Move to another list
- Copy to another list

The process for completing the following actions is discussed in detail under the Select an Action section of this training guide on page 35.

Results within the list can be re-sorted by title or by the date the title was added to the list using the Arrange By menu.
Furthermore, the physical order of the titles can be rearranged within the list by clicking, dragging and dropping the Reorder Titles icon.

Item details can be accessed by clicking on the title link or the cover art, just as you would in a hit list.

To perform an action:

1. Select the check boxes next to the specific title(s) in the Temporary list.

   Users also have the option of selecting the checkbox beside the **Select an Action** drop down menu which allows you to select every displayed title in the Temporary list before performing an action.

2. Click the **Select an Action** button at the top of the list.

   The remaining steps differ based on the desired action you select. These unique steps are listed below.
Save Temporary List

The **Save Temporary List** feature allows users to add selected titles currently found in the Temporary list and rename the list for organizational purposes. This action would be performed instead of adding and naming a new list and then moving selected titles from the Temporary list to the new list.

**To save the Temporary list:**

1. Click the **Save Temporary List** option from the Select an Action menu.

2. Enter the new list name in the Save As field in the new window.

3. Click **Save**.

The new list is created and is found among the other list in My Lists.
Delete Selected

The **Delete Selected** feature allows users to remove unwanted titles from My Lists.

To remove unwanted titles from My Lists:

1. Click the **Delete Selected** option from the **Select an Action** menu.

2. Click Delete in the confirmation window.

The selected title no longer appears among any list in My Lists.
Move/Copy

The Move and Copy options are also used to organize My Lists. These two options follow the same process. When you move titles, they no longer will exist as part of the Temporary list. Conversely, when you copy titles, they will exist as part of the Temporary list.

To move/copy titles in My Lists:

1. Select the appropriate option from the Select an Action menu.

2. Select a list from the menu provided to which you would like to move/copy the titles.

3. Do one of the following:
   - Click Move.
   - Click Copy.
Managing Other Lists

Accessing Other Lists

Users can access other saved lists in My Lists by selecting the list name in the Lists column.

Adding a New List

To add a new list to My Lists:

1. Click the Add List button.

2. Enter a new name for the list in the List Name field.

3. Click Create.
Removing Old Lists

To delete an old list:

1. Select the list(s) to remove.

2. Click the **Delete Lists** button.

3. In the confirmation window, click **Delete**.
Field Mapping

Translation

Each element below is in the form: xxxx (yyy) (zzz) where ‘xxxx’ is a descriptive name of the element, ‘(yyy)’ indicates whether it comes from Bibliographic or Item information, and ‘(zzz)’ where ‘zzz’ is a number refers to a ‘marc map id’ – which relates to the number in ‘Source of Data’ table at the bottom. (e.g. “Author (Bib) (9)” means it is an Author type field, comes from the Bib record, and the details of what is pulled from the Bib record is in the MMID column numbered ‘9’ in the table below).

A couple of these have additional notes in brackets ([ ] ). Normally, where an Extraction defines multiple tags, then ALL instances of those tags in the Bib record are indexed / displayed. Exceptions are noted as [Single Value] – which means the first tag defined that exists in the Bib record is the one whose data is used.

Bib data is divided into Marc 21 and UNIMARC. For the Item data, it’s the same for both standards.

What is Indexed

The following information is indexed:

- Author (Bib) (9)
- Bib Summary (Bib) (127)
- Electronic Access (Bib) (57)
- Format (Bib) (66)
- ISBN (Bib) (71)
- Language (Bib) (82)
- Pub Date (Bib) (93)
- Publisher (Bib) (96)
- Series (Bib) (114)
- Subject (Bib) (121)
- Title (Bib) (132)
- Call Number (Item)
- Item Type (Item)
Existing Facets

The following are existing facets:

- Author (Bib) (9)
- Library (Item)
- Format (Bib) (66)
- Itype (Item)
- Language (Bib) (82) (Single Value)
- Pub Date (Bib) (93) (Single Value)
- Subject (Bib) (121)

What Displays in the Detail Results

The following displays from the bibliographic record:

- ISBN (Bib) (28)
- Personal Author (Bib) (29)
- Corporate Author (Bib) (30)
- Conference Author (Bib) (31)
- Uniform Title (Bib) (32)
- Title (Bib) (33)
- Edition (Bib) (34)
- Publication Info (Bib) (35)
- Physical Description (Bib) (36)
- Series (Bib) (37)
- Series Title (Bib) (38)
- General Note (Bib) (39)
- Contents (Bib) (40)
- Abstract (Bib) (41)
- Reading Level (Bib) (42)
• Program Info (Bib) (43)
• Local Note (Bib) (44)
• Personal Subject (Bib) (45)
• Corporate Subject (Bib) (46)
• Conference Subject (Bib) (47)
• Title Subject (Bib) (48)
• Subject Term (Bib) (49)
• Geographic Term (Bib) (50)
• Genre Term (Bib) (51)
• Added Author (Bib) (52)
• Added Corporate Author (Bib) (53)
• Added Conference Author (Bib) (54)
• Added Uniform Title (Bib) (55)
• Added Title (Bib) (56)
• Electronic Access (Bib) (57)

The following displays from the item record:

• Library (Item)
• Item Type (Item)
• Call Number (Item)

**Source of Data**

Generally, the data is made up of the contents of the defined Subfield(s) within each Tag. If a Bib record has more than one instance of a Tag, then the data from each is included. If a Field has more than one tag defined, then data from each one that exists in the Bib Record is included. For example, using the ‘Author’ definition, if some Marc 21 Bib record has a 100 tag and two 700 tags, but no 110, 111, 130, 710, 711, or 740 tag, then there will be three pieces of data returned: one for the 100 tag, and one each for the 700 tags.

The Subfields are normally defined in a comma delimited list. Sometimes, there is literal data to be included – when this happens, the Subfield(s) would have something like this:
..., (<a href="")u(""), ...

which means that if there is a $u in the tag, then use it, but prefix it with what is in the parens before the u: <a href="" and suffix it with what is in parens after the u: "">

Further, sometimes a subfield is included only when a condition is met, like this:

..., [(856 subfield $u exists)]()z(/a), ...

In this case, the $z is included only if the tag also has a $u (and, will have a suffix...)

Putting this all together, a somewhat complex Subfield(s) entry might be:
(<a href="")u(""), [(856 subfield $u exists)]()z(/a), v, 3

This means:

- If there is a $u, then include it, prefixing it with <a href="", and suffix it with "">
- If there is a $z, then if there is a $u in the 856 tag, then include the $z, with no prefix (the parens are empty), but with a suffix of </a>
- If there is a $v, include it.
- If there is a $3, include it.
- When there are multiple subfields being concatenated together for a single tag, they are separated by a space character.
- Sometimes, the whole tag is included ‘conditionally’ – in this case, there will be some type of test in the Notes column.

**Bib – MARC 21**

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**SirsiDynix Symphony Training**
Formats – MARC 21

- This pulls the 007 position 0 if 007 exists and position 1 is a ‘|’. It will prefix this with a ‘7.’
- This pulls the 007 positions 0 and 1 if 007 exists and position 1 is not a ‘|’. It will prefix this with a ‘7.’
- If there is no 007, then the leader positions 6 and 7 are pulled, no prefix is added.

Once this value is determined, then it is transformed into a more descriptive version using the ‘normalize format’ table, included at the end of this document. Note that this table is the same for both Marc 21 and UNIMARC.

| 66 | Format | 007 | (7) Pos 0 for a length of 1 () | (007 subfield $_1:1$ value is “|”) |
|----|--------|-----|-----------------------------|----------------------------------|
|    |        | 007 | (7) Pos 0 for a length of 2 () | (007 subfield $_1:1$ value is not “|”) |
|    |        | 000 | Position 6 for a length of 2 | (007 does not exist) |

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For UNIMARC, Series Title is not defined

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For UNIMARC, Program Information is not defined

43 | Program Information |  
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For UNIMARC, Local Note is not defined

44 | Local Note |  
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45 | Personal Subject | 600 | a, b, c, d, f, h, t, (-)x(), (-)y(), (-)z()  
---|---|---

46 | Corporate Subject | 601 | a, b, c, e, f, g, h, t, (-)x(), (-)y(), (-)z()  
(601 indicator 1 value is "0")  
---|---|---

47 | Conference Subject | 601 | a, b, c, e, f, g, h, t, (-)x(), (-)y(), (-)z()  
(601 indicator 1 value is "1")  
---|---|---

48 | Title Subject | 605 | a, h, i, k, l, m, n, q, r, s, t, u, (-)x(), (-)y(), (-)z()  
---|---|---

49 | Subject Term | 606 | a, (-)x(), (-)y(), (-)z()  
---|---|---

50 | Geographic Term | 607 | a, (-)x(), (-)y(), (-)z()  
---|---|---

For UNIMARC, Genre Term is not defined

51 | Genre Term |  
---|---|---

52 | Added Author | 701 | a, b, c, d, f, g, p  
702 | a, b, c, d, f, g, p  
---|---|---

53 | Added Corporate Author | 711 | a, b, c, d, e, f, g, h, p  
a, b, c, d, e, f, g, h, p  
712 | a, b, c, d, e, f, g, h, p  
---|---|---

54 | Added Conference Author | 711 | a, b, c, d, e, f, g, h, p  
(711 indicator 1 value is "1")  
---|---|---

55 | Added Uniform Title | 501 | a, e, k, m  
---|---|---
For UNIMARC, Electronic Access is not defined

**Formats – UNIMARC**

This will pull data only from the FIRST tag, sequentially as defined in this table, that gives back data (i.e. will not evaluate all of them, returning multiple values...)

Once this value is determined, then it is transformed into a more descriptive version using the ‘normalize format’ table, included at the end of this document. Note that this table is the same for both Marc 21 and UNIMARC.

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<table>
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82 Language 101 a

93 Publication Date 100 a
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| 607 | a, ( -j0, (-)x(), (-)y(), (-)z() |
| 608 | a, ( -j0, (-)x(), (-)y(), (-)z() |
| 616 | a, (jc()), (jf()), ( -j0, (-)x(), (-)y(), (-)z() |
| 600 | a, (jc()), (jf()), ( -j0, (-)x(), (-)y(), (-)z() |
| 601 | a, (jc()), (jd()), (je()), (jf()), ( -j0, (-)x(), (-)y(), (-)z() |
| 602 | a, (jf()), ( -j0, (-)x(), (-)y(), (-)z() |
| 605 | a, (jb()), (jh()), (ji()), ( -j0, (-)x(), (-)y(), (-)z() |
| 604 | a, ( -j0, (-)x(), (-)y(), (-)z() |
| 127 | Summary | 330 | a |
| 132 | Title All Fields | 200 | a, (jb()), (jc()), (=d0, (je()), ( /f0, ( /g0, ( /h0, ( /i0 |
| 500 | a, (h0, (i0, (l0, (k0, (m0, (n0, (q0, (r0, (s0, (t0, (u0, (v0, (w0, ( -x0, ( -y0, ( -z0 |
| 501 | a, (e0, (k0, (m0 |
| 503 | a, (jb()), ( -d0, (e0), (f0, ( /h0, ( /i0, ( /j0, (k0, ( /m0, ( /n0, ( /q0, ( /r0, ( /s0, ( /t0, ( /u0, ( /v0, ( /w0 |
| 510 | a, (e0, (h0, (i0, (j0 |
| 512 | a, (e0 |
| 513 | a, (e0, (h0, (i0 |
| 514 | a, (e0 |
| 515 | a |
| 516 | a, (e0 |
| 517 | a, (e0 |
| 518 | a |
| 520 | a, (e0, (h0, (i0, (j0 |
| 530 | a, (jb()), (jj) |
### Item

1. **Library**
   - Horizon: Item table, location column, 949 tag subfield a
   - Symphony/Unicorn: ITEM table, Library column, 999 tag subfield m

2. **Item Type**
   - Horizon: Item table, itype column, 949 tag subfield c
   - Symphony/Unicorn: ITEM table, Type column, 999 tag subfield t

3. **Call Number**
   - Horizon: Item table, call_reconstructed column, 949 tag subfield d
   - Symphony/Unicorn: CALLNUM table, ITEM_NUMBER column, 999 tag subfield a
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7ag=DIAGRAM
7aj=MAP
7ak=MAP
7aq=MODEL
7ar=REMOTESEN
7as=SECTION
7au=MAP
7ay=VIEW
7az=MAP
7a|=MAP

7c=ER
7ca=ER
7cb=ER
7cc=ER
7cf=ER
7ch=ER
7cj=ER
7cm=ER
7co=ER
7cr=ER
7cu=ER
7cz=ER
7gu=PROJGRAPHIC
7gz=PROJGRAPHIC
7g|=PROJGRAPHIC

7h=MICROFORM
7ha=MICROFORM
7hb=MICROFORM
7hc=MICROFORM
7hd=MICROFORM
7he=MICROFORM
7hf=MICROFORM
7hg=MICROFORM
7hu=MICROFORM
7hz=MICROFORM
7h|=MICROFORM

7k=NONPROJGRAPH
7kc=COLLAGE
7kd=DRAWING
7ke=PAINTING
7kf=PRINT
7kg=PHOTO
7kh=PHOTO
7ki=PICTURE
7kj=PRINT
7kl=TECHDRAWING
7kn=CHART
7ko=FLASHCARD
7ku=NONPROJGRAPH
7kz=NONPROJGRAPH
7k|=NONPROJGRAPH

7m=MOTIONPICT
7mc=MOTIONPICT
7mf=MOTIONPICT
7mr=MOTIONPICT
7mu=MOTIONPICT
7mz=MOTIONPICT
7m|=MOTIONPICT

7o=KIT
7ou=KIT
7o|=KIT

7q=NOTATEDMUSIC
7qu=NOTATEDMUSIC
7q|=NOTATEDMUSIC

7r=REMOTESEN
7ru=REMOTESEN
7r|=REMOTESEN

7s=SOUNDREC
7sd=SOUNDDISC
7se=SOUNDREC
7sg=SOUNDREC
7si=SOUNDREC
7sq=SOUNDREC
7ss=SOUNDCASS
7st=SOUNDREC
7su=SOUNDREC
7sw=SOUNDREC
7sz=SOUNDREC
7s|=SOUNDREC

7t=BOOK
7ta=REGPRINT
7tb=LARGEPRINT
7tc=BRAILLE
7td=LOOSELEAF
7tu=BOOK
7tz=BOOK
7t |=BOOK

7v=VIDEOREC
7vc=VIDEOCART
7vd=VIDEODISC
7vf=VIDEOCASS
7vr=VIDEOREEL
7vu=VIDEOREC
7vz=VIDEOREC
7v | = VIDEOREC

7z = UNSPECIFIED
7zm = UNSPECIFIED
7zu = UNSPECIFIED
7zz = UNSPECIFIED
7z | = UNSPECIFIED

#UNIMARC entries
u100d = BOOK
u100f = BOOK
u100g = BOOK
u100h = BOOK
u100i = BOOK
u100j = BOOK
u105 = BOOK

u106f = BRAILLE
u106d = LARGEPRINT
u106r = REGPRINT

#Tag number, Position, value
u1158g = FILMSTRIP
u1158j = FILMSTRIP
u1150a = MOTIONPICT
u1150b = PROJGRAPHIC
u130d=MICROFORM
u130e=MICROFORM
u130f=MICROFORM
u130g=MICROFORM
u130h=MICROFORM
u130z=MICROFORM
u135a=COMPFILE
u135b=COMPFILE
u135c=COMPFILE
u135d=COMPFILE
u135u=COMPFILE
u135v=COMPFILE
u135z=COMPFILE