

**DRAFT**

## **RILM on New FirstSearch: Recommendations for Improvement**

**Update by Tracey Rudnick  
15 July 2003, amended 20 January 2004**

The following recommendations are based largely on the FirstSearch RILM review (2000 MOUG meeting and newsletter) by Robert Acker, Emma Dederick-Colón, and Rebecca Littman; recommendations assembled by Martin Jenkins (2001 MOUG meeting and newsletter) that took into account changes brought by the New FirstSearch interface; MLA-L comments; and new observations of FirstSearch RILM. The recommendations below were presented to 2003 MOUG attendees for comments, amendments, and priority setting; Deborah L. Bendig, Product Manager, WorldCat in FirstSearch, OCLC, was in attendance. The 2003 presentation included recent FirstSearch enhancements and updates to previous recommendations. Much of this information has been excised from the current recommendation but can be found in Rudnick's report cited below.

### **I. FURTHER READING: REPORTS AND ENHANCEMENT UPDATES**

Acker, Robert, Emma Dederick-Colón, and Rebecca Littman. "RILM Abstracts on FirstSearch." *Music OCLC Users Group Newsletter* no. 76 (September 2000): 17–23.

"AskMOUG: Reference and Public Services Facilitator: Sonya Oliver." Report by Matthew Sheehy. *Music OCLC Users Group Newsletter* no. 78 (May 2001): 22–23.

"Enhancements to RILM Database On OCLC FirstSearch Service." *Music OCLC Users Group Newsletter* no. 79 (November 2001): 8. Official announcement from OCLC representative Sonya Oliver about changes that took effect on Oct. 14, 2001.

Jenkins, Martin. "What's New With FirstSearch: RILM on New FirstSearch." Report by Tracey Rudnick. *Music OCLC Users Group Newsletter* no. 78 (May 2001): 16–18.

Rudnick, Tracey. "RILM on New FirstSearch: Recommendations for Improvement." *Music OCLC Users Group Newsletter* no. 84 (September 2003): 22–27. (Original report for MOUG membership.)

### **II. RECOMMENDATIONS REALIZED AS OF 2001**

The following recommendations have been implemented but might benefit from enhancement.

#### **1. Fix pre- and post-search sorting.**

Post-search sorting is available by year, author, classification, title, and library count. Pre-search ranking and sorting is not presently available in RILM. See further comments below about default sort order.

#### **2. Plurals function.**

There is no automatic plurals function. Users may search for simple plurals (s, es) by adding + to a term. In addition, right truncation (\*) and wildcards (#, ?) are also available.

#### **3. Limit searches to holdings in local library, region or state.**

The RILM search screen has a check box for a pre-search limit to "items in my library"; or, a pre-search limit may be set for any library code if you know the OCLC siglum. 2001 MOUG participants observed that there is a link to the sigla, but results can be unpredictable (e.g., if one's library is part of a consortium). There is no limit for states/regions. Sometimes the search inexplicably does not work.

### **III. SUGGESTED IMPROVEMENTS**

*Arranged in priority order.*

#### **1. Keyword Index and Authors (RILM and WorldCat) NEW ITEM**

RILM's (and WorldCat's) keyword search indexes the abstract, source phrase, subject, title, and cross references; it is a subject/topic-driven search. Author fields are excluded. This is contrary to the way many other databases function, and contrary to the way most users are taught. Library users expect their keyword searches to search for *all* terms in a record. In spite of the fact that there will be some useless hits, a pure keyword search will get the most complete search results possible. Many users use only the keyword search, and many reference librarians encourage

this. Users cannot be expected to know whether an author's name will appear in an author, title, abstract, or subject field (this is especially true in WorldCat); a pure keyword search allows some success under any circumstances. (To identify fields indexed: for WorldCat, go to the online Help and search the word "MARC." For RILM and other databases, see the revised RILM guide at [www.oclc.org/firstsearch/databases/index.htm](http://www.oclc.org/firstsearch/databases/index.htm) or the RILM Z39.50 guide at [www.oclc.org/firstsearch/documentation/z3950/rilm.htm](http://www.oclc.org/firstsearch/documentation/z3950/rilm.htm), accessed 7 February 2003.)

## 2. Sort Order in "List of Records" **NEW ITEM**

While users can perform post-search sorts, the default display order is seemingly random, even chaotic. Users frequently ask about display order and expect *something* alphabetical or chronological. They also indicate that accession number or load date makes no sense to them. Applying a sort for every search is inconvenient. RILM needs a logical default sort. If OCLC cannot change the default, then sort buttons (or better, drop-down menus, such as those available in WorldCat's Advanced and Expert modes), should be prominently placed on the search and display screens for maximum effect; users should be able to set a session sort order.

## 3. Searching RILM Numbers

The 2001 recommendation noted that there is some access to RILM numbers. Patrons can use the RILM Number index to search the complete RILM number (e.g., 95-16338-ap); use the Main Work index to find partial RILM numbers (e.g., 95-16338); or use the Contents of Collected Work index (partial number, e.g., 90-00244) to find entries for the contents of a work. For more information about RILM numbers, consult a RILM search guide at the University of Connecticut: [www.lib.uconn.edu/music/guides/RILMguide.pdf](http://www.lib.uconn.edu/music/guides/RILMguide.pdf) (accessed 6 February 2003). Unfortunately, these search strategies are beyond most of RILM's users. The problem may partially be resolved by creating hyperlinks between parent-child references. Users do encounter RILM number references in other sources, so they need the ability to search numbers in a simple to understand, single index. Clear instructions would be helpful.

The revised recommendation observes that the Accession Number search (formerly "RILM Number") allows users to omit the two-letter document-type suffix; this should increase user success. Otherwise, the situation has gone from bad to worse. The Contents of Work index, helpful for searching individual articles or essays in a Main work, no longer functions; even the online Help example (92-00276) no longer works. Many RILM records for essays no longer display the Main Work number for the collection. (Barbara Mackenzie of RILM indicated in a 4 February 2003 email that the problem happened after the last reload.) A Contents Browse search finds some records with hyperlinks back to the parent record, but the contents of Main Works are incompletely represented, many links do not work, and the RILM Numbers are wrong; perhaps these are experimental records. The loss of these features is unfortunate. While they were confusing to some users, at least professionals could mediate a search and help users quickly find what they needed. If and when the search works again, there should be hyperlinks between parent/child records, users should not have to reconstruct RILM numbers (e.g., derive 90-08210 from 8210), and online Help should clearly explain how and when to use each search.

## 4. Online Help

Expand Help screens, including more meaningful examples. Explain how to use classifications, document types, and descriptors to refine searches. Give proximity search tips more prominence. Define and explain each index: online Help provides index names and examples, but users must guess their meaning and appropriate usage. (The recently revised OCLC database guides at <http://www.oclc.org/firstsearch/databases/index.htm>, accessed 8 February 2003, include more indexes, index codes, and some additional information.) Explain the use of Expert indexes and codes (particularly document type) in all search modes.

Provide links to document type code lists, classifications, and classification numbers (or link to RILM's list at [www.rilm.org/classnum.html](http://www.rilm.org/classnum.html), accessed 7 February 2003).

Put a box at the bottom of the Advanced search screen (similar to that found on the Expert search screen) explaining truncation, Boolean, and proximity operators.

## 5. Subject Heading Indexes

The original recommendation requested subject heading and subject indexes in New FirstSearch. Users can now identify subject terms and subfield phrases by browsing the subject and subject phrase indexes. They can neither browse lists of *complete* subject headings containing multiple phrases/subfields (e.g., Brahms, Johannes --reception), nor can they perform any kind of search that crosses subfields (e.g., proximity searching, phrase searches using quotes, or FirstSearch's subject phrase search). Users are limited to the subject [keyword] search to find terms in subject headings; the results are imprecise, pulling unrelated terms from different headings (e.g., a subject search seeking materials on Brahms's reception finds an article on the reception of Bach's works and Bach's influence on Brahms). Subject access is further weakened by several omissions: cross references to authoritative terms, a thesaurus or syndetic structure, and especially a progression from broad to specific headings similar to those found

in online catalog subject heading browse searches. Users can see full subject strings (e.g., Beethoven, Ludwig van -- reception -- Austria -- Wien -- ca. 1900) in RILM's print volumes. NISC and SilverPlatter allow users to browse complete subject heading fields; it would be interesting to know if users take advantage of that feature.

## 6. Hyphenation (WorldCat and RILM) **NEW ITEM**

(This item was added to the list after the February 2003 MOUG presentation.) The hyphen needs to be re-indexed as a non-indexing character. Many online library catalogs already do this. Currently, the hyphen is treated as a literal character in the searching and indexing, rather than as a blank. This poses problems when searching hyphenated surnames (e.g., Nicolai Rimsky-Korsakov or Felix Mendelssohn-Bartholdy) or hyphenated terms (e.g., "full-text database" and other adjectival forms). For example, if one omits the hyphen or types only part of the name (e.g., Felix Mendelssohn Bartholdy or Felix Mendelssohn), there are no retrievals on the authoritative form of the name, Mendelssohn-Bartholdy. Any hits on the word "Mendelssohn" come from other places (e.g., poor authority control, the composer's sister Fanny Mendelssohn Hensel, a performing group with Mendelssohn in the name, or some other source for the word Mendelssohn). Unwary users incorrectly assume that they have effectively executed a search. One can find the full form of the name by typing the hyphen, using truncation, or using a Boolean "or" to search for alternate forms, but this strategy is unintuitive for most users. Users who type the hyphen also risk missing non-hyphenated uses of the word. (This entry was largely drawn from MLA-L correspondence from Darwin Scott and Yale Fineman 17–18 April 2003.)

## 7. Advanced Search (RILM and WorldCat) **NEW ITEM**

The word "advanced" is misleading; this search is just as easy as a single keyword box (or the new multi-box Basic Search offered after the July 2003 interface update), and presents several useful options that users seek when the first log in (e.g., limiting for format or language). Many librarians teach the Advanced search to their novice users as the "easier and more effective" search method. The search could have a more inviting name (e.g., "Guided Search"). Readers of this report are reminded that local systems administrators can set the Advanced search as the default.

By extension, the Basic Search screen (in WorldCat for example) could simply be combined with the Advanced screen by setting the default index searches to Keyword, Author, Title, ISBN, and Year. Users could still change the index if needed, and would have the Limit options below.

The Advanced indexes certainly should be standardized to match the Expert indexes. Only three indexes would need to be added: Abstract Present (pr:), Issue (is:), and Volume (vol:). These indexes might be used more often if they were in the Advanced search; their presence would not detract. Index labels (e.g., au:) should be included in the Advanced search indexes. This will help encourage users to learn and use index labels in any search mode. Also, it may be desirable having "all of these," "any of these," or "as a phrase" drop-down boxes next to each search text boxes, similar to that found in Endeavor's Voyager.

## 8. Limiting by Document Type

The original recommendation requested more choices for material type limits (at least periodical articles) in Advanced searches. Currently, results may be limited by six document types: articles, books, commentary, dissertations, media, reviews. Document Type and Document Type Phrase indexes have been added to drop-down index menus in Advanced and Expert search modes. Online Help should indicate that the Document Type Phrase index provides the most complete list of document types. Online Help for Basic, Advanced, and Expert searching should also indicate that index codes (especially document type) used in Expert mode also work in Basic and Advanced searches. For example, adding **dt=ap** or **dt="article in a periodical"** to a Basic or Advanced search limits results to periodical articles.

## 9. Authority Records

Add RILM's complete authority file to the subject and subject heading indexes (rather than separate Xreference index), with links to actual records and "see also" references if appropriate. This would be best implemented in a browseable subject heading index by providing hyperlinks in the authority file, which would automatically execute the search for the correct form of name. Example: a subject search for Mozart's *Magic Flute* should refer to *Zauberflöte*, with the opportunity to link directly to that term. Another example: if a student searches for Tchaikovsky, s/he will get very few hits because RILM spells it Cajkovskij; the user will not be prompted with the cross reference.

The keyword search now retrieves cross reference records (e.g., for Tchaikovsky). Records are displayed at the top of the results list, but their function and syntax are somewhat unclear to users. As with the cross reference search (formerly Xreference), the cross reference (e.g., Cajkovskij) is not clickable; one must re-enter the search. At the very least, the authorized form found in Xreference search should be clickable, bringing up a search screen with an authorized name form entered in one of the boxes. Name/title cross references (e.g., for Mozart's *Magic Flute*) should also be added to the cross reference or keyword searches.

(An aside: unauthoritative names and titles are retrieved as part of authoritative subject or subject phrase searches if they appear in a proper title for another work (e.g., Poznansky's book, *Tchaikovsky's Last Days: A Documentary Study* or Ingmar Bergman's film treatment of *Magic Flute*). Those bibliographic records include the actual authoritative titles in other subject headings, but users must be taught to redo the search using the correct form. The appearance of the unauthoritative title in a subject heading can be misleading to users who assume that the term's appearance in the controlled vocabulary means that they have found the correct form; in this context cross references are especially important.)

#### **10. Reviews, and the Relationship Between Reviews and Reviewed Items NEW ITEM**

From Barbara Mackenzie of RILM (4 February 2003 email): "Reviews are too hard to retrieve. Specifically: the only way to find the reviews of an item is to search title only; if one retrieves a book record with author+title search, there's no mention of reviews, let alone a way to get to them. There's a link from reviews to the main entry, but not the other way around, which would actually be more useful." Online Help should indicate appropriate strategies.

#### **11. Stopwords**

Stopwords have been removed from all indexes in the RILM database and are now searchable (see 14 October 2001 OCLC announcement cited above). As follow up, OCLC should remove the list of stopwords from RILM online Help, or specify those databases in which the stopwords still apply (e.g., WorldCat). FirstSearch does have reserved operators that one must type in quotes (e.g., and, with, near); these are clearly indicated in the online Help. The following characteristics and strategies should also be explained in Help. Single- and double-character stopwords (or regular words) tend to retrieve an excessive number of false hits, so users should be encouraged to use phrase or proximity searching (e.g., "a major," with the quotes, or a w1 major), rather than a and major. Also, RILM spells out the words "sharp" and "flat," rather than using the symbols # and b.

#### **12. Journal Cross References and ISSNs**

Provide cross-references from a journal whose title is an acronym or abbreviation (e.g., FoMRHI—*Fellowship of Makers and Restorers of Historical Instruments*) to include information such as the name of the publishing organization or an ISSN, to verify the publication. This would also be helpful to less experienced users who may not know what the acronyms mean. Options: add full titles or organization names to the list of titles; link to a list provided by RILM; do a global update incorporating this information; or, provide a searchable abbreviation box similar to that used in *GroveMusic* ([www.grovemusic.com](http://www.grovemusic.com), accessed 25 January 2003). The table version of the list of titles included in RILM on FirstSearch includes most but not all ISSNs; it may be that these titles do not have ISSNs assigned at all.

#### **13. Synonyms**

Implement a synonym list for multilingual musical terms (e.g., sinfonia = symphonie = symphony, or hautbois = oboe), English names for foreign cities (e.g., Florence = Firenze); incorporate it into a browseable subject index (this may be part of RILM's internal thesaurus). Also considering investigating *GroveMusic's* "concept" search, in which the system substitutes synonyms upon the user's request.

#### **14. Hyperlinks in Bibliographic Record**

Provide hyperlinks within the elements of the bibliographic record (e.g., author, subject headings, and other indexes in the bibliographic record). WorldCat provides a similar capability via hyperlinks in the bibliographic record for authors, descriptors, and class descriptors. WorldCat users can also follow hyperlinks by clicking on links or buttons for "Related Subjects," "Related Authors," "Limit By," and "More Like This" (observed 7 February 2003).

#### **15. Geopolitical Appendages NEW ITEM—Not yet verified**

Sometimes RILM adds a geopolitical appendage to a title, e.g., *Miscellanea musicologica* (AUS), in the print indexes. This gets translated by FirstSearch as *Miscellanea musicologica Australia*, with no parentheses or indication that "Australia" is not part of the source title. This can yield null results if one then searches for that source title in WorldCat. (The authors are still verifying that this does not happen in other RILM interfaces.)