

# Search/Discovery “Under the Hood”

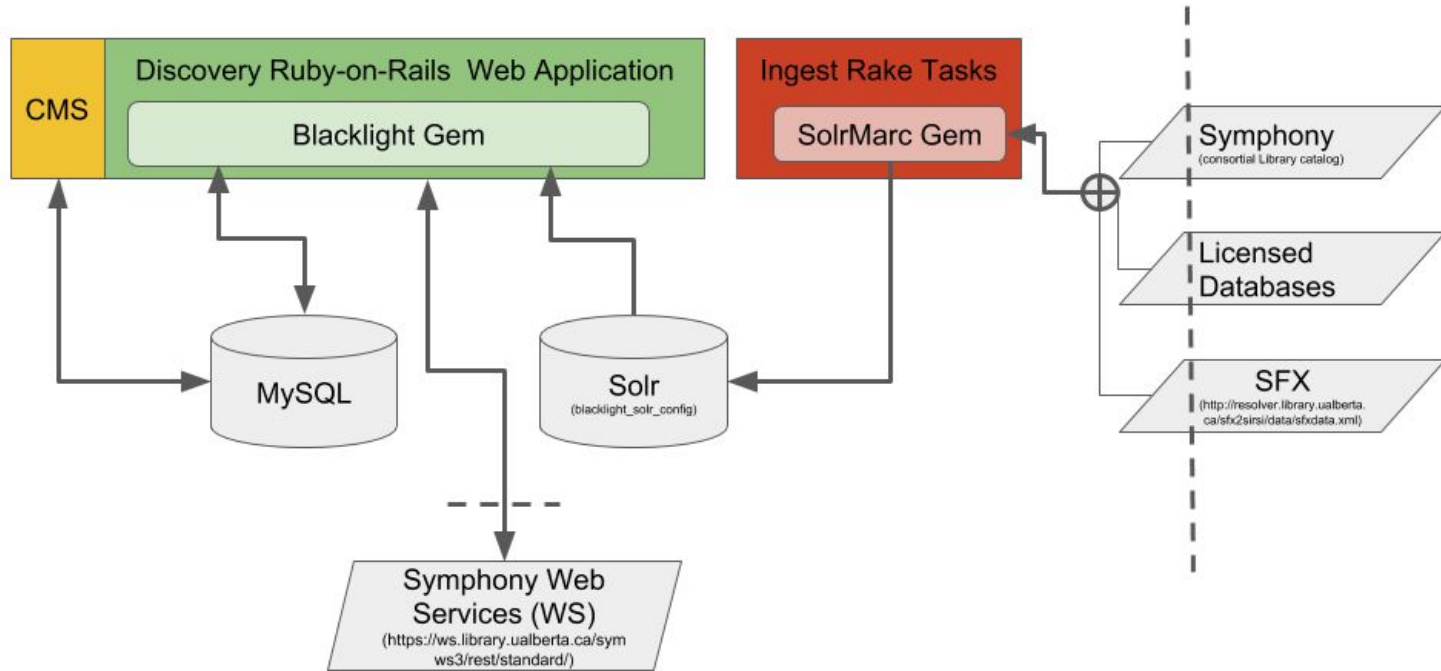
Tricia Jenkins and Sean Luyk | Spring Training 2019

# Outline

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- Search in libraries
- Search trends
- Search “under the hood”

## Discovery



The Discovery Technology Stack

# Solr

- Open Source Apache Project since 2007
- Webserver providing search capabilities
- Based on Apache Lucene
- Main competitor: Elastic Search
- Powers:



“

“Compared with the research tradition developed in information science and subsequently diffused to computer science, **the historical antecedents for understanding information retrieval in librarianship and indexing are far longer but less widely influential today**”

Warner, Julian. *Human Information Retrieval*. MIT Press: 2010

# Search in Libraries

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# Search Goal #1

Retrieve all relevant documents for a user query, while retrieving as few non-relevant documents as possible

# What makes search results “relevant”?

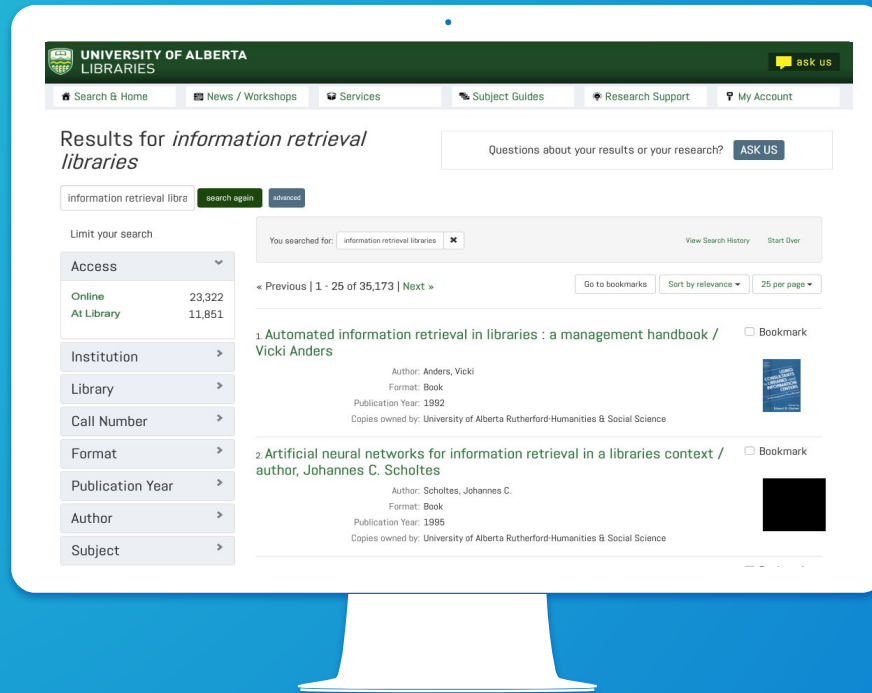
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It's all about expectations...





# Search Relevance is Hard



Users: relevant to me

Technologists: relevant as defined by the model

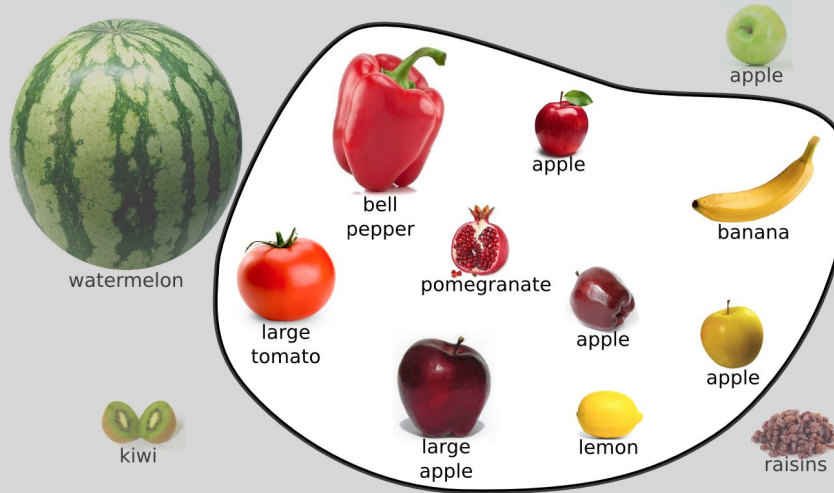
# Expectations for Precision Vary



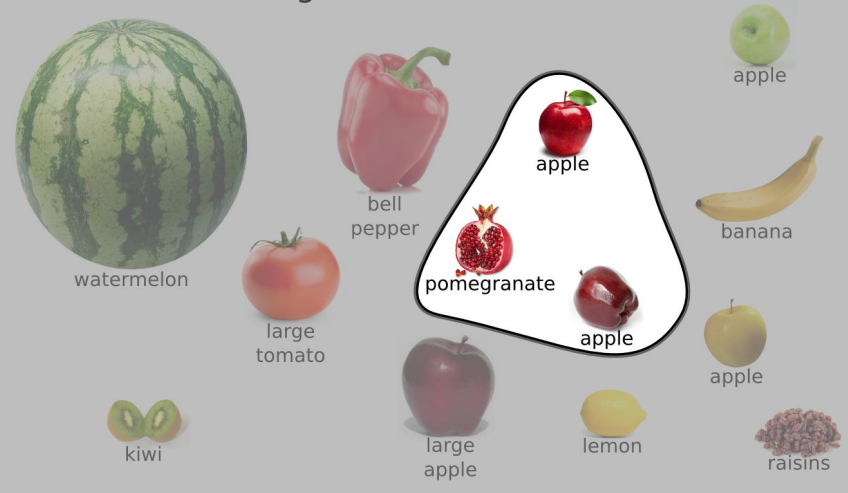
# Relevance and Precision are Always at Odds

Search query: "apples"

Initial Search Results



"Tight" Search Results





# Search Goal #2

Provide users with a good search  
experience

# What makes for a “good” user experience?

How do we know if we're providing users with a good search experience?



“

“To design the best UX, pay attention to what users **do**, not what they **say**. Self-reported claims are unreliable, as are user speculations about future behavior. Users do not know what they want.”

Nielsen, Jakob. “First Rule of Usability? Don’t Listen to Users”

<<https://www.nngroup.com/articles/first-rule-of-usability-dont-listen-to-users/>>



How do our users search?

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What are their priorities?

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How do different user groups search?

# Search Trends in Libraries

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## Focus on Delivery, Ditch Discovery (Utrecht)

- Improve delivery at point of need (e.g. Google Scholar)
- Don't invest in discovery. Let users use the systems they already do
- Provide good information on the best search engines for different kinds of materials



# Coordinated Discovery (UW-Madison)

- Show users information categories
- Connect searches across the categories, and recommend relevant resources from other categories
- Promote serendipitous discovery
- Present different metadata for different categories
- UI = not bento, but also not jambalaya



<https://www.library.wisc.edu/experiments/coordinated-discovery/>

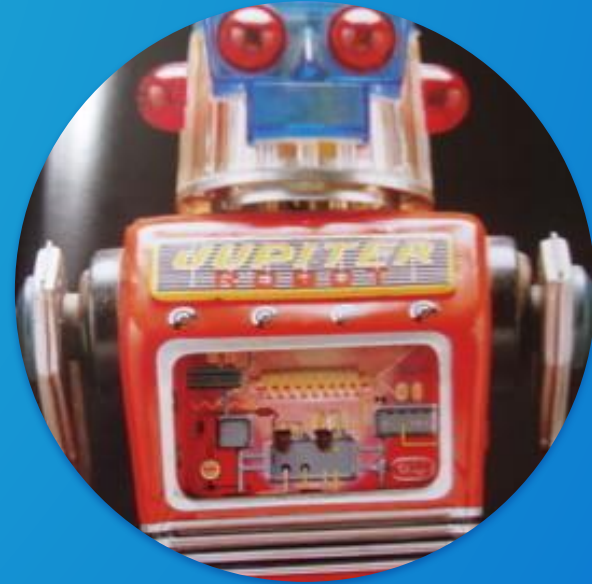
# New Developments

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# Machine Learning/AI Assisted Search

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- Use supervised/unsupervised machine learning to improve search relevance
- Use real user feedback (result clicks) and/or document features (e.g. quality) to train a learning to rank (LTR) model



# Machine Learning (in a nutshell)

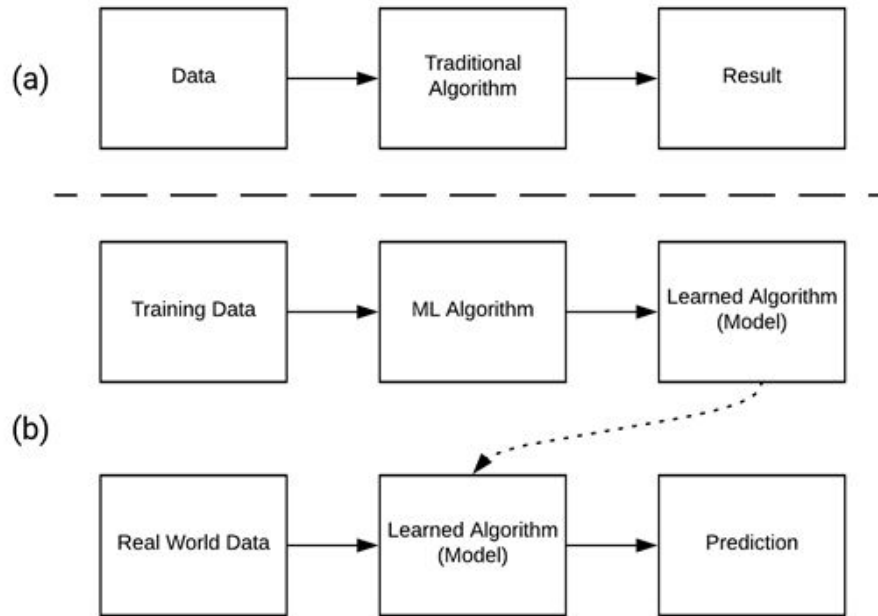


Figure 1. A traditional algorithm (a) versus a machine learning algorithm (b).

# Machine Learning-Powered Discovery

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Some examples...

- Carnegie Museum of Art [Teenie Harris Archives](#)
  - Automated metadata improvement, facial recognition:  
<https://github.com/cmoa/teenie-week-of-play>
- Capacity building: [Fantastic Futures](#), [Stanford Library AI Initiative/Studio](#)

# Clustering/Visualization

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- Use cluster analysis methods to group similar objects
- Example: [Carrot2](#) (open source clustering engine)
- Example: Stanford's use of [Yewno](#)



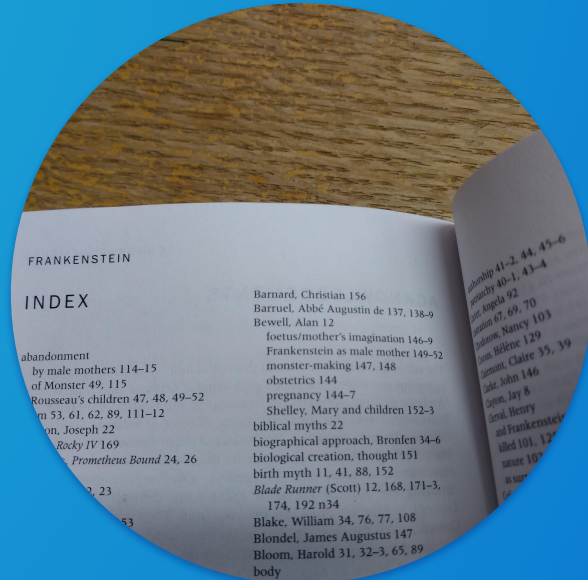
# Search Under the Hood

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# Index

If you are trying to find a subject in a book, where do you look first?



# Indexing Concepts

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## Inverted Index

A searchable index that lists every word and the documents that contain those words, similar to an index in the back of a book which lists words and the pages on which they can be found. Finding the term before the document saves processing resources and time.

## Stemming

A stemmer is basically a set of mapping rules that maps the various forms of a word back to the base, or stem, word from which they derive.

```

02831cga a2200481 a 4500
001 2117026
007 vf cbaho
008 930913s1993 abc020 v leng d
035 $a ocm30704841
040 $b eng
055 3 $a Z 710 $b F494 1993
090 $a Z 710 F494 1993 $b AEU
090 0 $a Z 710 F559 1993 $b ARDC
090 $a Z 710 F494 1993 $b AEC
245 00 $a Finding Frankenstein $h [videorecording] : $b an introduction to the University of Alberta Library system /
260 $a Edmonton, Alta. : $b Vicom, $c c1993.
300 $a 1 videocassette (20 min.) : $b sd., col. ; $c 1/2 in.
336 $a two-dimensional moving image $b tdi $2 rdacontent
337 $a video $b v $2 rdamedia
338 $a videocassette $b vf $2 rdacarrier
500 $a VHS.
500 $a Known as: University of Alberta Library instruction video.
500 $a Available in French with title: A la recherche de Frankenstein : une initiation au système de bibliothèque de l'Alberta
596 $a 38 42 43 48
610 20 $a University of Alberta. $b Library.
650 0 $a Library orientation $x Aids and devices.
650 0 $a Library orientation for college students.
650 0 $a Information services $x User education.
710 2 $a Vicom Ltd.
740 0 $a Introduction to the University of Alberta Library system.
740 0 $a University of Alberta Library instruction video.
740 2 $a A la recherche de Frankenstein.
740 4 $a Une initiation au système de bibliothèque de l'Alberta.
926 $a Z 710 F494 1993 $w LC $c 9 $i 0162000388809 $d 4/12/2001 $l ON_SHELF $m UASCITECH $n 8 $p $150.00 $r Y $s Y $t MAG_MEDIA $u 9/13/1993
926 $a Z 710 F494 1993 $w LC $c 5 $i 0162000388742 $d 10/12/2016 $e 9/21/2016 $l ON_SHELF $m UAHSS $n 10 $p $150.00 $r Y $s Y $t MAG_MEDIA $u 9/13/1993
926 $a Z 710 F494 1993 $w LC $c 6 $i 0162000388759 $d 10/12/2016 $e 9/29/2016 $l ON_SHELF $m UAHSS $n 3 $p $150.00 $r Y $s Y $t MAG_MEDIA $u 9/13/1993
926 $a Z 710 F494 1993 $w LC $c 7 $i 0162000388767 $d 10/12/2016 $e 9/29/2016 $l ON_SHELF $m UAHSS $n 3 $p $150.00 $r Y $s Y $t MAG_MEDIA $u 9/13/1993
926 $a Z 710 F494 1993 $w LC $c 8 $i 0162000388775 $d 10/12/2016 $e 9/29/2016 $l ON_SHELF $m UAHSS $n 9 $p $150.00 $r Y $s Y $t MAG_MEDIA $u 9/13/1993
926 $a Z 710 F494 1993 $w LC $c 2 $i 0162000388718 $d 2/1/1996 $l ON_SHELF $m UAHLTHSC $n 2 $p $150.00 $r Y $s Y $t MAG_MEDIA $u 9/13/1993
926 $a Z 710 F494 1993 $w LC $c 3 $i 0162000388726 $d 4/10/2013 $e 11/21/2006 $l ON_SHELF $m UARCRF $n 1 $p $150.00 $r Y $s Y $t MAG_MEDIA $u 9/13/1993 $o .STAFF. A0074008
926 $a Z 710 F494 1993 $w LC $c 1 $i 0162000388700 $l READONSITE $m UARCRF $p $150.00 $r Y $s Y $t NO_LOAN $u 9/13/1993 $o .STAFF. A0018532
926 $a Z 710 F494 1993 $w LC $c 10 $i 0162009685411 $l ON_SHELF $m UARCRF $p $150.00 $r Y $s Y $t MAG_MEDIA $u 8/17/1999 $o .STAFF. A0022869
926 $a Z 710 F494 1993 $w LC $c 11 $i 0162009685429 $l ON_SHELF $m UARCRF $p $150.00 $r Y $s Y $t MAG_MEDIA $u 8/17/1999 $o .STAFF. A0022869

```

## An example

### Finding Frankenstein [videorecording] : an introduction to the University of Alberta Library system / produced for University of Alberta Library

Additional authors/performers: Vicom Ltd.

Format: Video or Projection

Published: Edmonton, Alta: Vicom

Year: 1993

Physical Details: 1 videocassette (20 min.) : sd., col. ; 1/2 in

General Note: VHS. -- Known as: University of Alberta Library  
instruction video. -- Available in French with title: A  
la recherche de Frankenstein : une initiation au  
système de bibliothèque de l'Alberta.

Object type: videorecording

## Another example

```
00961cam a2200265 | 4500
001 38596
008 073074s1974 inu 0 eng l
010 $a 72080409
020 $a 0672514575
035 $a ocm00415598
040 $a DLC $b eng
049 $a aeu $b eng
050 0 $a PR 5397 $b F82 1974
090 00 $a PR 5397 F82 1974 $b AEU
100 1 $a Shelley, Mary Wollstonecraft, $d 1797-1851.
245 10 $a Frankenstein : $b or, The modern Prometheus.(The 1818 text) $c Edited, with variant readings, an introd., and notes, by James Rieger
260 $a Indianapolis, $b Bobbs-Merrill $c [1974.]
300 $a xiv, 287 p. $b illus. $c 21 cm.
336 $a text $b txt $2 rdacontent
337 $a unmediated $b n $2 rdamedia
338 $a volume $b nc $2 rdacarrier
490 0 $a The Library of literature
596 $a 43
740 4 $a The modern Prometheus.
926 $a PR 5397 F82 1974 $w LC $c 1 $i 000000895789 $d 9/4/2018 $e 9/4/2018 $k CHECKEDOUT $l ON_SHELF $m UAHSS $n 94 $p $150.00 $r M $s Y $t BOOK $u 10/25/1988
```

Frankenstein : or, The modern Prometheus.(The 1818 text)  
Edited, with variant readings, an introd., and notes, by James Rieger

Author: Shelley, Mary Wollstonecraft, 1797-1851

Format: Book

Published: Indianapolis: Bobbs-Merrill

Year: 1974

Physical Details: xiv, 287 p. illus. 21 cm

ISBN: 0672514575

Series: The Library of literature

<https://search.library.ualberta.ca/catalog/38596>

# Marc Mapping

```
27 # Title fields
28 #   primary title
29 title_t = custom, getLinkedFieldCombined(245[a-z])
30 title_display = 245[a-bd-z]
31 title_vern_display = custom, getLinkedField(245a)
32
33 #   additional title fields
34 title_add1_t = custom, getLinkedFieldCombined(130[a-z]:240[a-z]:210ab:222ab:242abnp:243[a-gk-s]:246[a-gnp]:247[a-gnp])
35 title_added_entry_t = custom, getLinkedFieldCombined(700[gk-pr-t]:710[fgk-t]:711fgklnpst:730[a-gk-t]:740anp)
36 title_series_t = custom, getLinkedFieldCombined(440anpv:490av)
37 title_sort = custom, getSortableTitle
38 edition_tesim = 250a
39 alternate_display_tesim = 880a
40 responsibility_display = 245c
```

# Analysis Chain

? Index Analyzer: org.apache.solr.analysis.TokenizerChain

Tokenizer: org.apache.lucene.analysis.standard.StandardTokenizerFactory

class: solr.StandardTokenizerFactory

luceneMatchVersion: 6.6.0

Token Filters: org.apache.lucene.analysis.icu.ICUFoldingFilterFactory

class: solr.ICUFoldingFilterFactory

luceneMatchVersion: 6.6.0

org.apache.lucene.analysis.core.StopFilterFactory

words: stopwords.txt

class: solr.StopFilterFactory

ignoreCase

luceneMatchVersion: 6.6.0

org.apache.lucene.analysis.snowball.SnowballPorterFilterFactory

language: English

class: solr.SnowballPorterFilterFactory

luceneMatchVersion: 6.6.0

# Finding Frankenstein [videorecording] : an introduction to the University of Alberta Library system

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ST	Finding	Frankenstein	videorecording	an	introduction	to	the	University	of	Alberta	Library	system
ICUFF	finding	frankenstein	videorecording	an	introduction	to	the	university	of	alberta	library	system
SF	finding	frankenstein	videorecording		introduction			university		alberta	library	system
SF	find	frankenstein	videorecord		introduc			univers		alberta	librari	system

# Frankenstein : or, The modern Prometheus.(The 1818 text)

---

<u>ST</u>	Frankenstein	or	The	modern	Prometheus	The	1818	text
<u>ICUFF</u>	frankenstein	or	the	modern	prometheus	the	1818	text
<u>SF</u>	frankenstein			modern	prometheus		1818	text
<u>SF</u>	frankenstein			modern	prometheus		1818	text



# Inverted Index

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word	documents
<u>frankenstein</u>	doc1, doc2
<u>edit</u>	doc2
<u>system</u>	doc1
<u>modern</u>	doc2
<u>introd</u>	doc2
<u>introduc</u>	doc1
<u>jame</u>	doc2
<u>librari</u>	doc1
<u>videorecord</u>	doc1
<u>note</u>	doc2

word	documents
<u>produc</u>	doc2
<u>prometheus</u>	doc2
<u>read</u>	doc2
<u>rieger</u>	doc2
<u>find</u>	doc1
<u>text</u>	doc2
<u>univers</u>	doc1
<u>variant</u>	doc2
<u>alberta</u>	doc1
<u>1818</u>	doc2

# Document Term Frequency

2	frankenstein
1	edit
	system
	modern
	introd
	introduc
	jame
	librari
	videorecord
	note
	produc
	prometheus
	read
	rieger
	find
	text
	univers
	variant
	alberta
	1818

## Now repeat for many different attributes

We use a dynamic schema which defines many common types that can be used for searching, display and faceting. We apply these to title, author, subject, etc.

Use Case	indexed	stored	multiValued	omitNorms	termVectors	termPositions	docValues
search within field	true						
retrieve contents		true <sup>2</sup>					true <sup>2</sup>
use as unique key	true		false				
sort on field	true <sup>2</sup>		false <sup>2</sup>	true <sup>1</sup>			true <sup>2</sup>
highlighting	true <sup>4</sup>	true			true <sup>2</sup>	true <sup>3</sup>	
faceting <sup>5</sup>	true <sup>2</sup>						true <sup>2</sup>
add multiple values, maintaining order			true				
field length affects doc score				false			
MoreLikeThis <sup>5</sup>					true <sup>6</sup>		

## Search Concepts

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### DisMax

DisMax stands for Maximum Disjunction. The DisMax query parser takes responsibility for building a good query from the user's input using Boolean clauses containing multiple queries across fields and any configured boosts.

### Boosting

Applying different weights based on the significance of each field.

## DisMax

**mm**

Minimum "Should" Match: specifies a minimum number of clauses that must match in a query.

```
<str name="mm">6<&lt;90%</str>
```

**qf**

Query Fields: specifies the fields in the index on which to perform the query.

```
<str name="qf">  
id^100000  
isbn_t^100000  
issn_t^100000  
lc_callnum_display^100000  
title_unstem_search^100000  
title_tesim^100000  
subtitle_unstem_search^100000  
title_t^25000  
subtitle_t^25000  
title_addl_unstem_search^25000  
title_addl_t^25000  
earlier_title_tesim^25000  
later_title_tesim^25000  
title_added_entry_unstem_search^1500  
title_added_entry_t^1250  
publication_year^1000  
subject_topic_unstem_search^1000  
subject_topic_tesim_search^500  
subject_t^500  
author_unstem_search^250  
author_addl_unstem_search^250  
author_t^100  
title_addl_t^50  
contents_tesim^50  
databasesdescription_tesim^50  
subject_addl_unstem_search^250  
subject_addl_t^50  
gmd_tesim^50  
summary_holdings_tesim^50  
title_series_unstem_search^25  
local_note_tesim^25  
general_note_tesim^25  
awards_note_tesim^25  
title_series_t^10  
section_number_tesim^10  
section_name_tesim^10  
<!-- text -->  
<!-- source -->  
</str>
```

**q**

Defines the raw input strings for the query.

i.e. frankenstein

# Simplified Dismax

---

frankenstein ○

```
title^100000  
subject^1000  
author^250
```



```
title:frankenstein^100000 OR  
subject:frankenstein^1000 OR  
author:frankenstein^250
```

# frankenstein

```
"(+DisjunctionMaxQuery(((subtitle_t:frankenstein)^25000.0 | (databasedescription_tesim:frankenstein)^50.0 | (gmd_tesim:frankenstein)^50.0 | (isbn_t:frankenstein)^100000.0 | (lc_callnum_display:frankenstein)^100000.0 | (subject_addl_t:frankenstein)^50.0 | (general_note_tesim:frankenstein)^25.0 | (title_addl_t:frankenstein)^25000.0 | (subject_t:frankenstein)^500.0 | (later_title_tesim:frankenstein)^25000.0 | (subject_addl_unstem_search:frankenstein)^250.0 | (title_series_unstem_search:frankenstein)^25.0 | (issn_t:frankenstein)^100000.0 | (subject_topic_unstem_search:frankenstein)^1000.0 | (title_unstem_search:frankenstein)^100000.0 | (awards_note_tesim:frankenstein)^25.0 | (section_name_tesim:frankenstein)^10.0 | (earlier_title_tesim:frankenstein)^25000.0 | (title_addl_unstem_search:frankenstein)^25000.0 | (title_t:frankenstein)^25000.0 | (title_tesim:frankenstein)^100000.0 | (publisher_tesim:frankenstein)^1000.0 | (id:frankenstein)^100000.0 | (subtitle_unstem_search:frankenstein)^100000.0 | (title_series_t:frankenstein)^10.0 | (local_note_tesim:frankenstein)^25.0 | (author_unstem_search:frankenstein)^250.0 | (subject_unstem_search:frankenstein)^750.0 | (author_t:frankenstein)^100.0 | (author_addl_unstem_search:frankenstein)^250.0 | (contents_tesim:frankenstein)^50.0 | (author_addl_t:frankenstein)^50.0 | (title_added_entry_t:frankenstein)^1250.0 | (summary_holdings_tesim:frankenstein)^50.0 | (title_added_entry_unstem_search:frankenstein)^1500.0 | (section_number_tesim:frankenstein)^10.0~0.01 DisjunctionMaxQuery(((subtitle_t:frankenstein)^25000.0 | (databasedescription_tesim:frankenstein)^500.0 | (gmd_tesim:frankenstein)^500.0 | (isbn_t:frankenstein)^1000000.0 | (lc_callnum_display:frankenstein)^1000000.0 | (subject_addl_t:frankenstein)^500.0 | (general_note_tesim:frankenstein)^250.0 | (title_addl_t:frankenstein)^25000.0 | (subject_t:frankenstein)^5000.0 | (later_title_tesim:frankenstein)^25000.0 | (subject_addl_unstem_search:frankenstein)^2500.0 | (title_series_unstem_search:frankenstein)^250.0 | (source:frankenstein)^100000.0 | (issn_t:frankenstein)^1000000.0 | (subject_topic_unstem_search:frankenstein)^10000.0 | (title_unstem_search:frankenstein)^1000000.0 | (awards_note_tesim:frankenstein)^250.0 | (section_name_tesim:frankenstein)^100.0 | (earlier_title_tesim:frankenstein)^25000.0 | (title_addl_unstem_search:frankenstein)^250000.0 | (title_t:frankenstein)^250000.0 | (title_tesim:frankenstein)^1000000.0 | (publisher_tesim:frankenstein)^10000.0 | (id:frankenstein)^1000000.0 | (text:frankenstein)^10.0 | (subtitle_unstem_search:frankenstein)^1000000.0 | (title_series_t:frankenstein)^100.0 | (local_note_tesim:frankenstein)^250.0 | (author_unstem_search:frankenstein)^2500.0 | (subject_unstem_search:frankenstein)^7500.0 | (author_t:frankenstein)^1000.0 | (author_addl_unstem_search:frankenstein)^2500.0 | (subject_topic_facet:frankenstein)^6250.0 | (contents_tesim:frankenstein)^500.0 | (author_addl_t:frankenstein)^500.0 | (title_added_entry_t:frankenstein)^12500.0 | (summary_holdings_tesim:frankenstein)^500.0 | (title_added_entry_unstem_search:frankenstein)^15000.0 | (section_number_tesim:frankenstein)^100.0)~0.01))/no coord"
```

# Show Your Work

```
▼ explain:
▼ 38596:
"\n266593.2 = sum of:\n 24227.56 = max plus 0.01 times others of:\n 24187.45 = weight(title_unstem_search:frankenstein in 0) [SchemaSimilarity], result of:\n 24187.45 = score(doc=0,freq=2.0 = termFreq=2.0\n), product of:\n 100000.0 = boost\n 0.18232156 = idf, computed as log(1 + (docCount - docFreq + 0.5) / (docFreq + 0.5)) from:\n 2.0 = docCount\n 1.3266368 = tfNorm, computed as (freq * (k1 + 1)) / (freq + k1 * (1 - b + b * fieldLength / avgFieldLength)) from:\n 2.0 = parameter k1\n 0.75 = parameter b\n 18.5 = avgFieldLength\n 20.897959 = fieldLength\n 4011.0745 = weight(title_t:frankenstein in 0) [SchemaSimilarity], result of:\n 4011.0745 = score(doc=0,freq=1.0 = termFreq=1.0\n), product of:\n 25000.0 = boost\n 0.18232156 = idf, computed as log(1 + (docCount - docFreq + 0.5) / (docFreq + 0.5)) from:\n 2.0 = docCount\n 1.3266368 = tfNorm, computed as (freq * (k1 + 1)) / (freq + k1 * (1 - b + b * fieldLength / avgFieldLength)) from:\n 2.0 = parameter k1\n 0.75 = parameter b\n 18.5 = avgFieldLength\n 20.897959 = fieldLength\n 4011.0745 = weight(title_t:frankenstein in 0) [SchemaSimilarity], result of:\n 4011.0745 = score(doc=0,freq=1.0 = termFreq=1.0\n), product of:\n 100000.0 = boost\n 0.18232156 = idf, computed as log(1 + (docCount - docFreq + 0.5) / (docFreq + 0.5)) from:\n 2.0 = docCount\n 1.3266368 = tfNorm, computed as (freq * (k1 + 1)) / (freq + k1 * (1 - b + b * fieldLength / avgFieldLength)) from:\n 2.0 = parameter k1\n 0.75 = parameter b\n 18.5 = avgFieldLength\n 20.897959 = fieldLength\n 4011.0745 = weight(title_unstem_search:frankenstein in 0) [SchemaSimilarity], result of:\n 4011.0745 = score(doc=0,freq=2.0 = termFreq=2.0\n), product of:\n 100000.0 = boost\n 0.18232156 = idf, computed as log(1 + (docCount - docFreq + 0.5) / (docFreq + 0.5)) from:\n 2.0 = docCount\n 1.3266368 = tfNorm, computed as (freq * (k1 + 1)) / (freq + k1 * (1 - b + b * fieldLength / avgFieldLength)) from:\n 2.0 = parameter k1\n 0.75 = parameter b\n 18.5 = avgFieldLength\n 20.897959 = fieldLength\n 4011.0745 = weight(title_unstem_search:frankenstein in 0) [SchemaSimilarity], result of:\n 4011.0745 = score(doc=0,freq=1.0 = termFreq=1.0\n), product of:\n 1.8998418 = weight(text:frankenstein in 0) [SchemaSimilarity], result of:\n 1.8998418 = score(doc=0,freq=1.0 = termFreq=1.0\n), product of:\n 1.8998418 = boost\n 1.0 = docCount\n 1.0 = docFreq\n 1.0 = avgFieldLength\n 1.0 = fieldLength\n 1.0 = termFreq=1.0\n 1.2 = parameter k1\n 0.75 = parameter b\n 71.0 = avgFieldLength\n 64.0 = fieldLength"
```

```
▼ 2117626:
"\n266638.28 = sum of:\n 24239.842 = max plus 0.01 times others of:\n 6.808311 = weight(general_note_tesim:frankenstein in 1) [SchemaSimilarity], result of:\n 6.808311 = score(doc=1,freq=1.0 = termFreq=1.0\n), product of:\n 25.0 = boost\n 0.2876821 = idf, computed as log(1 + (docCount - docFreq + 0.5) / (docFreq + 0.5)) from:\n 1.0 = docCount\n 0.9466437 = tfNorm, computed as (freq * (k1 + 1)) / (freq + k1 * (1 - b + b * fieldLength / avgFieldLength)) from:\n 1.0 = parameter k1\n 0.75 = parameter b\n 25.0 = avgFieldLength\n 28.44445 = fieldLength\n 24187.45 = weight(title_unstem_search:frankenstein in 1) [SchemaSimilarity], result of:\n 24187.45 = score(doc=1,freq=2.0 = termFreq=2.0\n), product of:\n 100000.0 = boost\n 0.18232156 = idf, computed as log(1 + (docCount - docFreq + 0.5) / (docFreq + 0.5)) from:\n 2.0 = docCount\n 1.3266368 = tfNorm, computed as (freq * (k1 + 1)) / (freq + k1 * (1 - b + b * fieldLength / avgFieldLength)) from:\n 2.0 = parameter k1\n 0.75 = parameter b\n 18.5 = avgFieldLength\n 20.897959 = fieldLength\n 4011.0745 = weight(title_t:frankenstein in 1) [SchemaSimilarity], result of:\n 4011.0745 = score(doc=1,freq=1.0 = termFreq=1.0\n), product of:\n 25000.0 = boost\n 0.18232156 = idf, computed as log(1 + (docCount - docFreq + 0.5) / (docFreq + 0.5)) from:\n 2.0 = docCount\n 0.88 = tfNorm, computed as (freq * (k1 + 1)) / (freq + k1 * (1 - b + b * fieldLength / avgFieldLength)) from:\n 1.0 = parameter k1\n 0.75 = parameter b\n 12.0 = avgFieldLength\n 16.0 = fieldLength\n 555.1907 = weight(title_added_entry_t:frankenstein in 1) [SchemaSimilarity], result of:\n 555.1907 = score(doc=1,freq=1.0 = termFreq=1.0\n), product of:\n 1250.0 = boost\n 0.6931472 = idf, computed as log(1 + (docCount - docFreq + 0.5) / (docFreq + 0.5)) from:\n 1.0 = docCount\n 0.6407767 = tfNorm, computed as (freq * (k1 + 1)) / (freq + k1 * (1 - b + b * fieldLength / avgFieldLength)) from:\n 1.0 = parameter k1\n 0.75 = parameter b\n 12.0 = avgFieldLength\n 16.0 = fieldLength\n 666.2289 = weight(title_added_entry_unstem_search:frankenstein in 1) [SchemaSimilarity], result of:\n 666.2289 = score(doc=1,freq=1.0 = termFreq=1.0\n), product of:\n 1500.0 = boost\n 0.6931472 = idf, computed as log(1 + (docCount - docFreq + 0.5) / (docFreq + 0.5)) from:\n 1.0 = docCount\n 0.6407767 = tfNorm, computed as (freq * (k1 + 1)) / (freq + k1 * (1 - b + b * fieldLength / avgFieldLength)) from:\n 1.0 = parameter k1\n 0.75 = parameter b\n 12.0 = avgFieldLength\n 16.0 = fieldLength\n 666.2289 = weight(general_note_tesim:frankenstein in 1) [SchemaSimilarity], result of:\n 6.808311 = score(doc=1,freq=1.0 = termFreq=1.0\n), product of:\n 250.0 = boost\n 0.2876821 = idf, computed as log(1 + (docCount - docFreq + 0.5) / (docFreq + 0.5)) from:\n 1.0 = docCount\n 0.9466437 = tfNorm, computed as (freq * (k1 + 1)) / (freq + k1 * (1 - b + b * fieldLength / avgFieldLength)) from:\n 1.0 = parameter k1\n 0.75 = parameter b\n 25.0 = avgFieldLength\n 28.44445 = fieldLength\n 24187.45 = weight(title_unstem_search:frankenstein in 1) [SchemaSimilarity], result of:\n 24187.45 = score(doc=1,freq=2.0 = termFreq=2.0\n), product of:\n 100000.0 = boost\n 0.18232156 = idf, computed as log(1 + (docCount - docFreq + 0.5) / (docFreq + 0.5)) from:\n 2.0 = docCount\n 1.3266368 = tfNorm, computed as (freq * (k1 + 1)) / (freq + k1 * (1 - b + b * fieldLength / avgFieldLength)) from:\n 2.0 = parameter k1\n 0.75 = parameter b\n 18.5 = avgFieldLength\n 20.897959 = fieldLength\n 4011.0745 = weight(title_t:frankenstein in 1) [SchemaSimilarity], result of:\n 4011.0745 = score(doc=1,freq=1.0 = termFreq=1.0\n), product of:\n 250000.0 = boost\n 0.18232156 = idf, computed as log(1 + (docCount - docFreq + 0.5) / (docFreq + 0.5)) from:\n 2.0 = docCount\n 0.88 = tfNorm, computed as (freq * (k1 + 1)) / (freq + k1 * (1 - b + b * fieldLength / avgFieldLength)) from:\n 1.0 = parameter k1\n 0.75 = parameter b\n 12.0 = avgFieldLength\n 16.0 = fieldLength\n 2.5374484 = weight(text:frankenstein in 1) [SchemaSimilarity], result of:\n 2.5374484 = score(doc=1,freq=3.0 = termFreq=3.0\n), product of:\n 10.0 = boost\n 0.18232156 = idf, computed as log(1 + (docCount - docFreq + 0.5) / (docFreq + 0.5)) from:\n 2.0 = docCount\n 1.3917434 = tfNorm, computed as (freq * (k1 + 1)) / (freq + k1 * (1 - b + b * fieldLength / avgFieldLength)) from:\n 3.0 = termFreq=3.0\n 1.2 = parameter k1\n 0.75 = parameter b\n 71.0 = avgFieldLength\n 113.7778 = fieldLength\n 5551.907 = weight(title_added_entry_t:frankenstein in 1) [SchemaSimilarity], result of:\n 5551.907 = score(doc=1,freq=1.0 = termFreq=1.0\n), product of:\n 12500.0 = boost\n 0.6931472 = idf, computed as log(1 + (docCount - docFreq + 0.5) / (docFreq + 0.5)) from:\n 1.0 = docCount\n 0.6407767 = tfNorm, computed as (freq * (k1 + 1)) / (freq + k1 * (1 - b + b * fieldLength / avgFieldLength)) from:\n 1.0 = parameter k1\n 0.75 = parameter b\n 12.0 = avgFieldLength\n 16.0 = fieldLength\n 28.44445 = fieldLength\n 6662.2886 = weight(title_added_entry_unstem_search:frankenstein in 1) [SchemaSimilarity], result of:\n 6662.2886 = score(doc=1,freq=1.0 = termFreq=1.0\n), product of:\n 15000.0 = boost\n 0.6931472 = idf, computed as log(1 + (docCount - docFreq + 0.5) / (docFreq + 0.5)) from:\n 1.0 = docCount\n 0.6407767 = tfNorm, computed as (freq * (k1 + 1)) / (freq + k1 * (1 - b + b * fieldLength / avgFieldLength)) from:\n 1.0 = parameter k1\n 0.75 = parameter b\n 12.0 = avgFieldLength\n 16.0 = fieldLength\n 28.44445 = fieldLength"
```



## Boolean Model + Vector Space Model

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### Boolean query

A document either matches or does not match a query.  
AND, OR, NOT

### IDF

Inverse document frequency deals with the problem of terms that occur too often in the collection to be meaningful for relevance determination.

### TF

Term frequency is the number of times a term occurs in a document. A document that mentions a query term more often has more to do with that query and therefore should receive a higher score.

# University of Alberta Library

```
*(+(DisjunctionMaxQuery(((subtle t:univers)^25000.0 | (databasesdescription_tesim:univers)^50.0 | (gmd_tesim:univers)^50.0 | (isbn t:univers)^100000.0 | (lc_callnum_display:univers)^100000.0 | (subject_addl_t:univers)^50.0 | (general_note_tesim:univers)^25.0 | (title_addl_t:univers)^25000.0 | (subject_t:univers)^500.0 | (later_title_tesim:univers)^25000.0 | (subject_addl_unstem_search:univers)^250.0 | (title_series_unstem_search:univers)^25.0 | (issn_t:univers)^100000.0 | (subject_topic_unstem_search:univers)^1000.0 | (title_unstem_search:univers)^100000.0 | (awards_note_tesim:univers)^25.0 | (section_name_tesim:univers)^10.0 | (earlier_title_tesim:univers)^25000.0 | (title_addl_unstem_search:univers)^25000.0 | (title_t:univers)^25000.0 | (title_tesim:univers)^100000.0 | (publisher_tesim:univers)^1000.0 | (id:univers)^100000.0 | (subtle_unstem_search:univers)^100000.0 | (title_series_t:univers)^10.0 | (local_note_tesim:univers)^25.0 | (author_unstem_search:univers)^250.0 | (subject_unstem_search:univers)^750.0 | (author_t:univers)^100.0 | (author_addl_unstem_search:univers)^250.0 | (contents_tesim:univers)^50.0 | (author_addl_t:univers)^50.0 | (title_added_entry_t:univers)^1250.0 | (summary_holdings_tesim:univers)^50.0 | (title_added_entry_unstem_search:univers)^1500.0 | (section_number_tesim:univers)^10.0)-0.01) DisjunctionMaxQuery(((subtle t:alberta)^25000.0 | (databasesdescription_tesim:alberta)^50.0 | (gmd_tesim:alberta)^50.0 | (isbn t:alberta)^100000.0 | (lc_callnum_display:alberta)^100000.0 | (subject_addl_t:alberta)^50.0 | (general_note_tesim:alberta)^25.0 | (title_addl_t:alberta)^25000.0 | (subject_t:alberta)^500.0 | (later_title_tesim:alberta)^25000.0 | (subject_addl_unstem_search:alberta)^250.0 | (title_series_unstem_search:alberta)^25.0 | (issn t:alberta)^100000.0 | (subject_topic_unstem_search:alberta)^1000.0 | (title_unstem_search:alberta)^100000.0 | (awards_note_tesim:alberta)^25.0 | (section_name_tesim:alberta)^10.0 | (earlier_title_tesim:alberta)^25000.0 | (title_addl_unstem_search:alberta)^25000.0 | (title_t:alberta)^25000.0 | (title_tesim:alberta)^100000.0 | (publisher_tesim:alberta)^1000.0 | (id:alberta)^100000.0 | (subtle_unstem_search:alberta)^100000.0 | (title_series_t:alberta)^10.0 | (local_note_tesim:alberta)^25.0 | (author_unstem_search:alberta)^250.0 | (subject_unstem_search:alberta)^750.0 | (author_t:alberta)^100.0 | (author_addl_unstem_search:alberta)^250.0 | (contents_tesim:alberta)^50.0 | (author_addl_t:alberta)^50.0 | (title_added_entry_t:alberta)^1250.0 | (summary_holdings_tesim:alberta)^50.0 | (title_added_entry_unstem_search:alberta)^1500.0 | (section_number_tesim:alberta)^10.0)-0.01) DisjunctionMaxQuery(((subtle t:library)^25000.0 | (databasesdescription_tesim:library)^50.0 | (gmd_tesim:library)^50.0 | (isbn t:library)^100000.0 | (lc_callnum_display:library)^100000.0 | (subject_addl_t:library)^50.0 | (general_note_tesim:library)^25.0 | (title_addl_t:library)^25000.0 | (subject_t:library)^500.0 | (later_title_tesim:library)^25000.0 | (subject_addl_unstem_search:library)^250.0 | (title_series_unstem_search:library)^25.0 | (issn t:library)^100000.0 | (subject_topic_unstem_search:library)^1000.0 | (title_unstem_search:library)^100000.0 | (awards_note_tesim:library)^25.0 | (section_name_tesim:library)^10.0 | (earlier_title_tesim:library)^25000.0 | (title_addl_unstem_search:library)^25000.0 | (title_t:library)^25000.0 | (title_tesim:library)^100000.0 | (publisher_tesim:library)^1000.0 | (id:library)^100000.0 | (subtle_unstem_search:library)^100000.0 | (title_series_t:library)^10.0 | (local_note_tesim:library)^25.0 | (author_unstem_search:library)^250.0 | (subject_unstem_search:library)^750.0 | (author_t:library)^100.0 | (author_addl_unstem_search:library)^250.0 | (contents_tesim:library)^50.0 | (author_addl_t:library)^50.0 | (title_added_entry_t:library)^1250.0 | (summary_holdings_tesim:library)^50.0 | (title_added_entry_unstem_search:library)^1500.0 | (section_number_tesim:library)^10.0)-0.01))-3 DisjunctionMaxQuery(((subtle t:\univers ? alberta library\~3)^250000.0 | (databasesdescription_tesim:\univers ? alberta library\~3)^500.0 | (gmd_tesim:\univers ? alberta library\~3)^500.0 | (isbn t:\univers ? alberta library\~3)^1000000.0 | (lc_callnum_display:\univers ? alberta library\~3)^1000000.0 | (subject_addl_t:\univers ? alberta library\~3)^500.0 | (general_note_tesim:\univers ? alberta library\~3)^250.0 | (title_addl_t:\univers ? alberta library\~3)^25000.0 | (subject_t:\univers ? alberta library\~3)^5000.0 | (later_title_tesim:\univers ? alberta library\~3)^25000.0 | (subject_addl_unstem_search:\univers ? alberta library\~3)^2500.0 | (title_series_unstem_search:\univers ? alberta library\~3)^250.0 | (title_unstem_search:\univers ? alberta library\~3)^250.0 | (source:University of Alberta Library)^100000.0 | (issn t:\univers ? alberta library\~3)^1000000.0 | (subject_topic_unstem_search:\univers ? alberta library\~3)^10000.0 | (title_unstem_search:\univers ? alberta library\~3)^1000000.0 | (awards_note_tesim:\univers ? alberta library\~3)^250.0 | (section_name_tesim:\univers ? alberta library\~3)^100.0 | (earlier_title_tesim:\univers ? alberta library\~3)^25000.0 | (title_addl_unstem_search:\univers ? alberta library\~3)^250000.0 | (title_t:\univers ? alberta library\~3)^250000.0 | (title_tesim:\univers ? alberta library\~3)^1000000.0 | (publisher_tesim:\univers ? alberta library\~3)^10000.0 | (id:\univers ? alberta library\~3)^1000000.0 | (text:\univers ? alberta library\~3)^10.0 | (subtle_unstem_search:\univers ? alberta library\~3)^1000000.0 | (title_series_t:\univers ? alberta library\~3)^100.0 | (local_note_tesim:\univers ? alberta library\~3)^250.0 | (author_unstem_search:\univers ? alberta library\~3)^2500.0 | (subject_unstem_search:\univers ? alberta library\~3)^7500.0 | (author_t:\univers ? alberta library\~3)^1000.0 | (author_addl_unstem_search:\univers ? alberta library\~3)^2500.0 | (subject_topic_facet:University of Alberta Library)^6250.0 | (contents_tesim:\univers ? alberta library\~3)^500.0 | (author_addl_t:\univers ? alberta library\~3)^500.0 | (title_added_entry_t:\univers ? alberta library\~3)^12500.0 | (summary_holdings_tesim:\univers ? alberta library\~3)^500.0 | (title_added_entry_unstem_search:\univers ? alberta library\~3)^15000.0 | (section_number_tesim:\univers ? alberta library\~3)^100.0)-0.01))/no_coord"
```



# Challenges

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## Precision vs Recall

Were the documents that were returned supposed to be returned?  
Were all of the documents returned that were supposed to be returned?

## Language

"L'armée furieuse" vs "armée furieuse"

## Phrase searching across fields

"Migrating library data a practical manual"

## Minimum "Should" Match

british missions "south pacific"

## Length Norms

matches on a smaller field score higher than matches on a larger field.  
"Managerial accounting garrison"

## Boosting

UAL content or recency.

# Tuning

Terminal window showing performance metrics and logs for a Taurus load testing tool.

Terminal title: pjenkins@DIG00ZTJ1: ~/Code/blacklight\_spl\_conf/test

Terminal content:

```
File Edit View Search Terminal Help
1 users, -0 active
Latest Interval Stats at 19:36:07
Average Times: Full: 0.090, Connect: 0.000, Latency: 0.042, -Receive: 0.048
Percentiles: 0.0%: 0.001, 50.0%: 0.025, 90.0%: 0.172, 95.0%: 0.410, 99.0%: 0.410, 99.9%: 0.410, 100.0%: 0.410
Response Codes: 200: 81.02% (3), 300: 18.18% (2), All: 100.00% (11)
Taurus | v1.13.4 by BlazeMeter.com |
JMeter: Replay_Solr_Logs.jmx
Running...
Elapsed: 95:33:09 ETA: N/A
local mem: 59.800, engine-logs: 74537, disk-writes: 113.892, bytes-recvd: 93.581, disk-reads: 92.644, disk-space: 29.000, bytes-sent: 11.774, conn-all: 46, conn: 27.400
Cumulative Stats 95:33:08
Average Times: Full: 0.145, Connect: 0.000, Latency: 0.137, -Receive: 0.008
Percentiles: 0.0%: 0.000, 50.0%: 0.047, 90.0%: 0.309, 95.0%: 0.592, 99.0%: 1.613, 99.9%: 1.715, 100.0%: 10.816
Response Codes: 200: 77.51% (1096913), 300: 17.33% (248236), 404: 1.22% (16135), 500: 1.00% (13400), All: 100.00% (1415248)
Labels
Hits Failures Avg Time
http://localhost:8983/solr/discovery/select?wt=ruby&q=search&facet.query= 244 8.61% 0.267
http://localhost:8983/solr/discovery/suggest?q=K22SuccessfulAssessmentFo 2 100.00% 0.001
http://localhost:8983/solr/discovery/suggest?q=experienting+the+depths+of+ 24 100.00% 0.002
http://localhost:8983/solr/discovery/select?wt=ruby&q=search&facet.query= 1156 26.82% 0.128
http://localhost:8983/solr/discovery/select?wt=ruby&q=search&facet.field= 1157 27.14% 0.354
http://localhost:8983/solr/discovery/select?wt=ruby&q=documentid=9549255 4172 0.00% 0.003
http://localhost:8983/solr/discovery/suggest?q=K22SUCCESSFUL+ASSESSMENT+FO 8 100.00% 0.001
http://localhost:8983/solr/discovery/select?wt=ruby&q=search&facet.query= 82 7.32% 0.188
http://localhost:8983/solr/discovery/select?defType=ismax&f.author_displa 266 0.00% 0.160
http://localhost:8983/solr/discovery/select?wt=ruby&q=documentid=8302327 3306 0.00% 0.006
http://localhost:8983/solr/discovery/suggest?q=subject+analysis+in+online 16 100.00% 0.006
http://localhost:8983/solr/discovery/select?wt=ruby&q=search&facet.field= 2504 1.00% 0.369
http://localhost:8983/solr/discovery/select?wt=ruby&q=search&facet.query= 6005 0.00% 0.229
http://localhost:8983/solr/discovery/select?wt=ruby&q=search&facet.field= 2 0.00% 0.892
http://localhost:8983/solr/discovery/select?wt=ruby&q=search&facet.field= 10522 0.00% 0.097
http://localhost:8983/solr/discovery/select?f.author_display.facet.lnlt=2 35928 2.01% 1.315
http://localhost:8983/solr/discovery/select?wt=ruby&q=search&facet.field= 381 13.35% 0.279
http://localhost:8983/solr/discovery/select?wt=ruby&q=search&facet.field= 4 0.00% 0.697
http://localhost:8983/solr/discovery/suggest?q=MeIssX2cG.+red.+1987.+Hazar 6 100.00% 0.001
09:55:30 WARNING: No details for errors of , dropped
Info: [{"c": 2, "tag": "None", "url": "Counter()", "rc": "400", "msg": "u'Bad Request'", "type": 0}]
```



# Thanks!

Any questions?

You can find us at

[sean.luyk@ualberta.ca](mailto:sean.luyk@ualberta.ca)

[tricia.jenkins@ualberta.ca](mailto:tricia.jenkins@ualberta.ca)