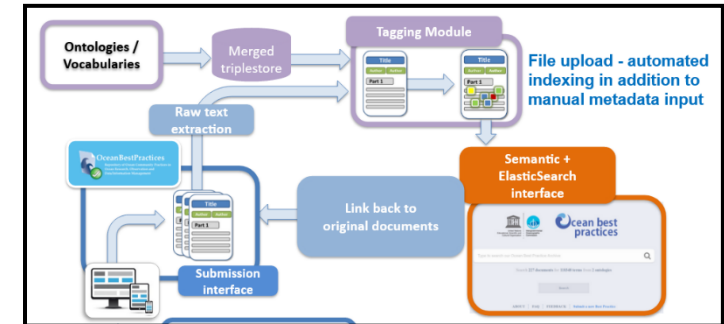


Repository Search Tips

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1. Content indexing for your search

To underpin the search functions offered in the Ocean Best Practices System Repository, rich metadata input and sophisticated automated semantic indexing technology using authorized vocabularies is executed for each document uploaded.



2. Performing a basic search

The most basic search is to use the search box with **All Fields** selected, which will search across all metadata fields content and the full text document. To search for a word or phrase, type it out in the search bar and press 'Enter' on your keyboard or click the search/magnifying glass Q icon or click the box labelled 'Search'. A list of results will be displayed in a new screen including your query text in a bubble below the search bar. You can add more terms or phrases to refine your search by entering them in the search bar above your results and hitting enter or clicking the search/magnifying glass Q icon to refresh your results. You can choose to make your second term search in another metadata field (see *Tip 3*). Additions will appear in new bubbles and you'll have the option to further refine your search with logical operators (Boolean) (see *Tip 5*). You can remove any term or phrase from the search by clicking the 'x' in its bubble, which will refresh the results. Further:

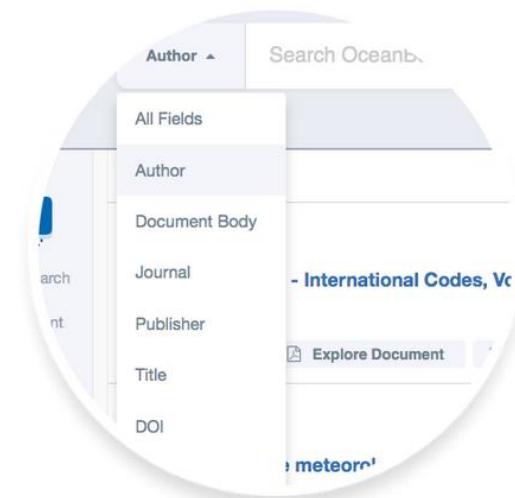
- Searches are not case sensitive
- Partial matches will be included in the results (e.g. a query like “mangroves” will also retrieve “mangrove”)
- On the first search screen you will likely see suggested terms and phrases appear as you enter your query: these are terms that are present in the ontologies, thesauri, and vocabularies that we use to index documents and are there to help you build a query. (you can choose to select a suggested term or ignore it.)

3. Metadata field search

You can restrict your search to a single metadata field – such as the Title, Author or Journal Title by using the dropdown menu to the left of the search bar.

You can also restrict your search to the body of the document in the repository, ignoring the content of the metadata fields, using the same dropdown menu and selecting “Document Body”.

Example: Selecting the "Author" field and then running a search for “Delauney” will only retrieve documents with “Delauney” in the "Author" metadata field. The search will not return results where “Delauney” is only present in the body of a document (e.g. its references section).



Note: After you’ve conducted a search, and want a completely new search, you need to click the Clear All button in the search bar area or click on 'x' in each of the search bubbles. If this is not done your new search will only be looking in the results of your previous search.

Some metadata field searches require that the search term corresponds to pre-selected parameters e.g. SDG requires the goal, target or indicator number **14.1**

Adoption Level Search

Select this metadata field from the Search dropdown by the search bar and search using one of the predetermined adoption levels that have been selected at the metadata submission: **Enter one of the search terms**

Search Terms	
Novel	= not adoption outside originators
Validated	= tested by third parties
Organisational	
Multi-organisational	
National	
International	

DOI: Digital Object Identifier Search

Select this metadata field from the Search dropdown by the search bar and then enter the exact DOI you wish to search for in the format **10.25607/OBP-561**

Endorsed Search

There are several ways to search for endorsed practices and it depends on whether you want to search for practices endorsed by a particular endorsing entity or want to find endorsed practices for a topic:

- a. Select Endorsed metadata field from the Search dropdown by the search bar. To search in this field you must know the name of the Endorsing entity - for the moment enter only GOOS

OR

- b. Search in [All Fields](#) for the topic e.g. nutrients, and in the Filter Option box, toggle ON 'Endorsed' - all records on the search results screen will be records where the metadata field Endorsement (External) has been completed

OR

- c. Search in [All Fields](#) for the topic e.g. nutrients, and on the results screen use the Sort dropdown and click on 'Endorsed' either asc or desc. the results at the top of the display will be the records where the metadata field Endorsement (External) has been completed but there will be no indication of how many of the top records are in the category

SDG: Sustainable Development Goals Search

Select this metadata field from the Search dropdown by the search bar. To search, you must enter the number of the SDG Goal/Target/Indicator e.g. 14.1

- 13 Take urgent action to combat climate change and its impacts
- 14 Conserve and sustainably use the oceans, seas and marine resources for sustainable development
 - 14.1 By 2025, prevent and significantly reduce marine pollution of all kinds, in particular from land-based activities, including marine debris and nutrient pollution
 - 14.2 By 2020, sustainably manage and protect marine and coastal ecosystems to avoid significant adverse impacts, including by strengthening their resilience, and take action for their restoration in order to achieve healthy and productive oceans

Variables: EOV/EBV/ECV

Select these metadata fields from the Search dropdown by the search bar. These fields require you to search for the name of the variable e.g. ocean sound. You can use a significant word from the variable name in the field BUT it much reduces the quality of your research results.

4. Scoring search results

It is not always easy to understand what results have been returned for your search. The scoring of a search result is determined based on the field matches from the query you specified and any additional filters you apply to the search.

By default, we sort matching search results by relevance score, which measures how well each document matches a query. When searching with a keyword a *query string* is constructed and used to find matching documents. A *query clause* asks the question: *How well does this document match the query clause?*. Besides deciding whether or not the document matches, the query clause also calculates a relevance score.

In order to produce better search results fields such as the *title* and *abstract* are boosted. Boosting a field means that the field counts more toward the relevance score. Currently the title and abstract fields are boosted at double the other searchable fields.

All searches are performed against Elasticsearch. More information about Elasticsearch relevance scoring can be found at [Query and filter context](#)

When searching by a specific term - a filter option is used to further narrow the search results. (see *Tip 6*). A filter option asks the simple question: *Does this document match the filter?*. The answer is a simple Yes or No and no relevance score is calculated.

5. Logical operators (Boolean AND, OR, NOT)

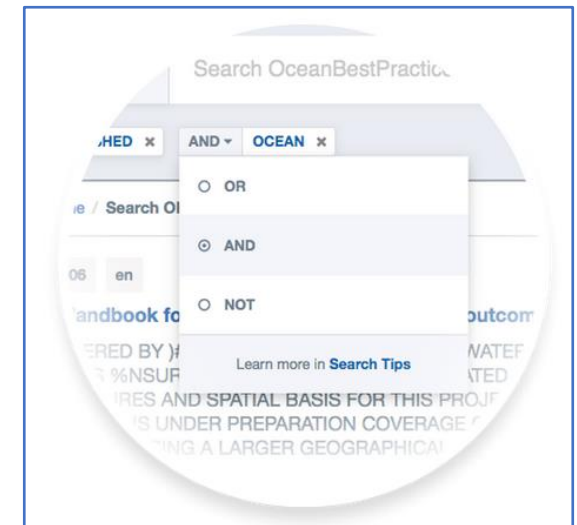
Logical operators give you more control over how multiple search queries are handled. By default, terms or phrases entered into the search bar are used to expand your initial search using the "OR" logical operator. The operator can be switched to an "AND" operator by clicking on it and using the dropdown menu. "AND" operators let you restrict your search, only retrieving documents which include both terms or phrases. Lastly, the "NOT" operator allows you to exclude documents that mention a certain term or phrase.

OR operators will include the term or phrase they are associated with in the search query, but it may not be present in the results

AND operators will require that the search term IS present in the results

NOT operators will require that the search term IS NOT present in the results

Example: Searching for "marinas" from the search homepage will bring up the results page, with the search bar at the top. Typing "fish" into the search bar on this results page will, by default, expand your search by including documents that mention "marinas" OR "fish" . Switching the operator in front of "fish" to an "AND" will restrict your search to only those documents that mention both "marinas" and "fish". Switching the operator in front of "ocean" to the "NOT" operator will exclude all documents that mention the term "fish" from your results for 'marinas'.



6. Search Filter Options

The Filter Options dropdown menu on the right of the search bar allows you to access additional functions to enhance your search. Always remember to switch OFF your filter options when moving onto a new search, unless you want all your searches to be filtered by the filter selected ON.

Endorsed Filter

To use the Endorsed filter

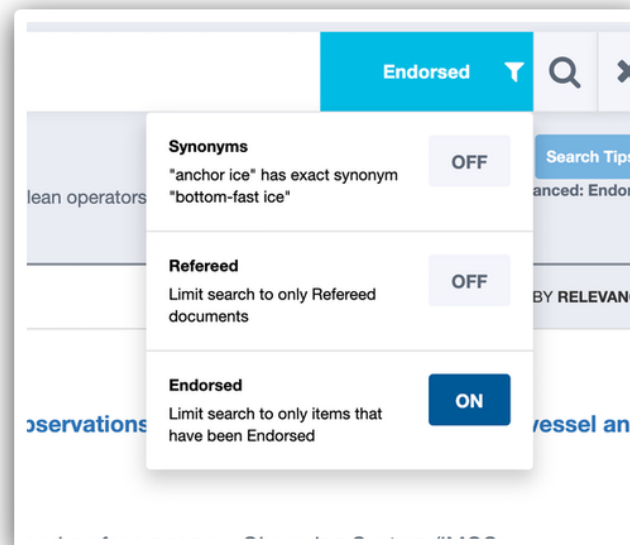
- a. Search in [All Fields](#) for the topic e.g. nutrients, and in the Filter Option box, toggle ON 'Endorsed' - all records displayed on the search results screen will be records where the metadata field Endorsement (External) has been completed

Synonyms Filter

Enabling this feature by toggling the OFF/ON button in the Filter Options dropdown will allow the system to check if a) your search term is present in any of the ontologies, thesauri, or vocabularies used to index documents in the archive and b) if those ontologies, thesauri, or vocabularies list any exact synonyms for that term. If they do, those synonyms will be added to the query to broaden your search.

Example: The term "seamount" is associated with the exact synonyms "sea mount" and "sea-mount". Allowing the system to search for these variants increases the likelihood of retrieving more relevant results.

Refereed Filter



If you would like your search to only return results for documents that have been identified as refereed, in the metadata, you can toggle ON/OFF 'Refereed' in the Filter Options dropdown

7. Interacting with your search results

Sorting

The "Sort By" dropdown menu on the right of the results page allows you to select what order your results will be displayed. By default, results are sorted by relevance, determined by standard metrics based on the number of times your search term or phrase occurs in a target document. Selecting any other sort option from the dropdown will re-sort your results.

After displaying the results from your search, if you select the 'Sort by Endorsed' will place document records in which the Endorsement (external) metadata field is completed at the top of the records displayed

Saved Search

If you wish to save a search result, simply save the URL in your browser's address bar or add it to your bookmarks.

Citations Export

On the bar above the search result records click 'Select All' or you can make a selection for export by clicking the small box by each individual record. After record selection a 'Download Citation' button will appear to click and export the citations to a file in your nominated download location e.g. filename: obp-export-citations ... Or, you can click the 'Generate Citation' button associated with the record and copy and paste the citation into another medium.

Viewing and downloading documents



in

Clicking the “Explore Document” button below each search result will launch a light-weight PDF viewer in a new tab. With this tool you can preview the records retrieved by your search as well as your search terms in context.

The terms or phrases you searched for will be highlighted across the document and are viewable individually (by using the dropdown menu which lists them) or all together by clicking on “Highlight All Terms”.

PDF Toolbar



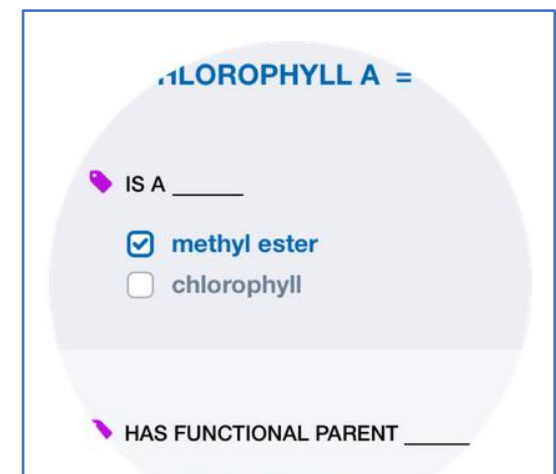
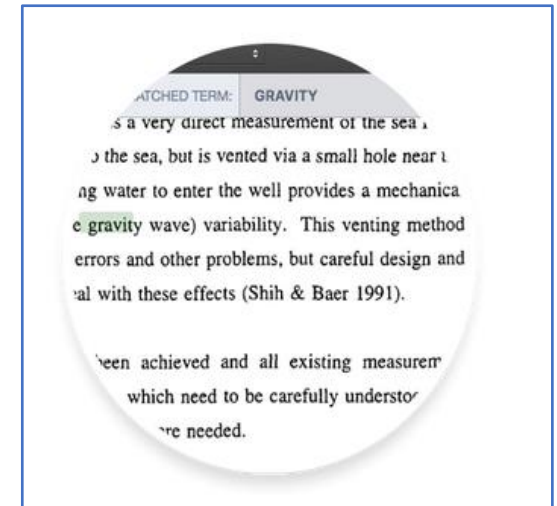
You can download or print the full document using the options in the PDF ribbon at the top of the page. When you are finished, simply close the preview tab in your browser and return to your search results.

Note: if you wish to see the complete record and metadata of any search result, please click the document title to be redirected to the Ocean Best Practices repository where you can also download the full document

8. Vocabularies - automated semantic indexing

Using tags

Based on their textual content, each document in the Ocean Best Practices System repository will have been automatically semantically indexed ("tagged") with terms from controlled vocabularies and/or ontologies. You can see which tags are associated with each document by clicking on "View Tags" in any search result and these will be displayed on the left hand side-bar.



You can click on any one of these tags to discover related keywords, categorized by how they are related to the original tag. By clicking the checkbox next to any tag, you can add it to your search, restricting results to documents that mention it.
