Chapter 4

Searching

Overview

The Archivists' Toolkit[™] provides support for searching Name, Subject, Accession, and Resource records. All data fields in these records can be searched as well as linked data in accession and resource records. Searching linked data allows for accession and resource records to be retrieved by searching for related data such as creator, source, and subject names; subjects; deaccession dates, and location. Resources can also be retrieved by searching for a specific instance type or for text within notes.

Note: The search interface includes a number of default search fields. These can be customized for a given repository. A list of the default fields in the search editor is available in the appendices. More information about customization is available in Chapter 15.

Filtering record lists

Every list may be filtered by typing text into the filter frame located above the sort columns. The filter process takes into account the values in all the columns that are present in the list screen display.

For example, filtering on the number 9 on the list of resources pictured will reduce the list to those resources in which "9" appears in the **Title, Extent Number, Resource Id, Extent Measurement**, or **Resource Identifier**.

Archivists' Toolkit - 1.1					_	. <u> </u>
File Import Setup Repor	1	rts Delete Expo	rt EAD			
Names	Resources					
Subjects Accessions	Filter: 9	10 Record(s)				
Resources	Title	Extent Number	Resource Id	Extent Measurement	Resource Identifier	
	Andrew J. and Erna Viterbi F	19	54 Linea	r feet	335	_
	Title of new resource record	0.89	42 Linea	r feet	A123	_
	Alfred Amery Papers	0.5	29 Linea	r feet	ALBA # 123	
	Frances Frost Papers	1.1	49 Linea	r feet	MSS 0007	
	Jerome Rothenberg Papers,	49.8	7 Linea	r feet	MSS 0010	
	Leaf of a gradual,	0.1	9 Linea	r feet	MSS 0024	
	Tarasca Gold Mining Compan	0.2	39 Linea	r feet	MSS 0167	
	Research files,	0.4	69 Linea	r feet	mss.189	
	Organization of Staff Analyst	8.9	18 Linea	r feet	Wagner #191	
	Frank Karl Papers	4	17 Linea	r feet	Wagner 192	
						•

Filtering on the number 89 will limit the list to only those resources in which that numeric expression is contained in the data of the list screen fields.

Archivists' Toolkit - 1. File Import Setup Repo						
Search 🔟 List A		ports Delete EAD Ex	port EAD			
Names Subjects	Resources					
Accessions	Filter: 89	2 Record(s)				
Resources	Title	Extent Number	Resource Id	Extent Measurement	Resource Identifier	
	Title of new resource record Research files,	0.89		Linear feet Linear feet	A123 mss.189	
	Research nies,	0.4	09	Lillear leeu	1155.109	
						-
<u> </u>						

This example indicates another characteristic of the filter feature: the filter is applied anew as each character is added or removed. Thus, adding or deleting a character from the filter expression will likely change the contents of the list.

To remove a filter, simply delete the text from the filter frame. The list screen will revert to its prior state.

Basic searching in all records

The Search tool provides the ability to search within a specific field, apply specific search operators, and create Boolean queries when searching any type of record.

To retrieve a subset of records using the search tool:

1. In the left hand navigation pane of the main screen, select the functional area (**Names**, Subjects, Accessions, or Resources) containing the records you wish to view.



2. Press the button.

	×
Names	Search Editor
Search names:	
Select a field Select a field Begins with	and v
	Cancel Search

3. Select a field to search.

Note: In any of the functional areas, information about record creation and updating can be searched using the Created, Created by, Updated, and Updated by fields. Created and Updated refer to the date the record was created or updated. Created by and Updated by are fields for the username of the person who performed the creation or update.

In addition, each area has a list of additional fields that can be searched. For example, under the Names functional area, it is also possible to search by Name Rule, Name Source, and Sort Name. These fields can be customized. See Chapter 15 for more information. See the appendices for a list of default searching fields for each functional area.

- 4. Select a search operator. Options are dependent upon the type of field being searched:
 - Options for text fields include:
 - Begins with •
 - Contains
 - Equals
 - Is Not Equal to
 - Is Empty

- Is Not Empty
- Fields associated with lookup lists offer the following options:
 - Equals
 - Is Not Equal to
 - Is Empty
 - Is Not Empty
- Integer and date fields provide the following search operators:
 - Equals
 - Is Between
 - Is Greater Than
 - Is Greater Than or Equal To
 - Is Less Than
 - Is Less Than or Equal To
- Yes/No fields provide only true or false search options

Note: Date searching requires that the date(s) entered be in the format established for the application. If you enter a date in the wrong format, the Toolkit may try to convert that date to the appropriate format, leading to an unexpected search. To ascertain the appropriate format for a date search, put any character in the search field and press the **Search** button. The Toolkit will return an error message giving the proper date format.

For information on establishing a date format for the Toolkit, see Chapter 15.

- 5. Enter or select a search term. Options are dependent upon the type of field being searched, and in some cases the operator:
 - a. Fields associated with lookup lists will provide the lookup list so that you can select the search string. All other text, date, or integer fields provide a search box for you to enter the search term.

<u>a</u>					×
Names			Sear	rch Editor	
Search names:					
Rules	-	Equals	-		
Last Updated	-	Equals			
				Anglo-American Cataloguing Rules (aacr)	
				Describing Archives: A Content Standard (dacs)	
				Local (local)	

b. Selecting the **Is Between** operator will result in two entry boxes, the first for the earlier number or date, the second for the later number or date. This search is inclusive, so that the begin date 1/1/2006 and end date 12/31/2006 will retrieve all actions for the year 2006.

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al Names	Sear	h Editor		×
Search names:	Begins with		40/04/0000	and 💌
Last Updated	Is between	▼ 1/1/2006	- 12/31/2006	Search

Note: The search string in date fields must follow the date format established for the system as a whole.

- 6. If desired, select a **Boolean** operator (and/or) and enter a second set of search options.
- 7. Press the Search button immediately below the basic query fields.

Tip: The Search tool has "sticky" values in order to allow you to easily refine a search. This means that once you have performed a search in a functional area, your search values will remain the next time you press the **Search** button for that functional area. The last search performed for a given area remains until the application is closed and restarted.

To quickly clear a search, open the first drop-down box and select **Select a field**, which clears all values for that part of the query. If clearing a **Boolean** search using both sets of search options, repeat this operation in the second part of the query as well.

Linked record searching in accessions and resources

For accession and resource records, the **Search Editor** also provides the ability to retrieve records by searching for related information. This includes names (creators, sources, subjects), subjects, location, or deaccession dates. In addition, you can search for resources containing a specific instance type, for example, digital objects and also for specific text within notes.

Note: The two search areas of the search tool for Accessions and Resources operate independently of each other. It is not possible to combine search parameters from the top and bottom areas of the screen.

To search by linked records:

1. In the left-hand navigation pane of the main screen, select Accessions or Resources.

		Search	
2.	Press the		button.

		x
Resources	Search Editor	
Search resources:		
	egins with 💌	and 💌
Include components in second secon	arch	
		Cancel Search
Search by linked record:		
Find by name		Lookup Clear Function
Find by subject		Lookup Clear
Find by location		Lookup Clear
Find by deaccession date	-	
Find by note text		
Find by instance type	T	
		Cancel Search

3. Use the following instructions to enter data into the **Search by linked record** area found in the lower half of the **Search Editor** window. Entering data into more than one of the following areas will create a Boolean "and" search of the values entered.

Find by name:

a. To search for creator, source, or subject name, press the **Lookup** button next to the **Find by name** search box.

esources	Na	me Lookup	
ilter:			
Sort Name	Name Type	Name Source	Name Rule
Addams Family	Family	ingest	Anglo-American Cat 🔺
anothertestnowforf	Person	ingest	Local
Ayres, Mary Clifton	Person	ingest	
Ayres, Mary Clifton	Person	ingest	
Blackburn, Paul C	Person	ingest	
Blackburn, Paul P	Person	ingest	
Borges, Jorge Luis	Person	Library of Congress	Local
Bradbury, Ray	Person	Local Sources	Anglo-American Cat
Bush, George, 1924	Person	ingest	_
Byrd, Bobby, 1942	Person	ingest	
Coates, Joseph F. (Person	ingest	
Dawson, Fielding, 1	Person	ingest	
Desert Growers Assoc	Corporate Body	ingest	
Geisel, Theodor Seu	Person	ingest	
Glenner, George G.,	Person	ingest	
Grolier Enterprises,	Corporate Body	ingest	
Iamgoingtoinputave	Person	ingest	Local
Imperial Irrigation Di	Corporate Body	ingest	
Institute for Technol	Corporate Body	ingest	

- b. Use the scroll bar to browse through the names, or the **Filter** box to narrow down the list.
- c. Once the desired name is located, select it by double clicking on the name or by clicking the name once and pressing the **Select** button. The **Find by name** search box will now contain the desired name.
- d. You may also select a **Function** to search by a name related to an accession or resource in a specific way, either as Creator, Source, or Subject.

Find by subject:

a. Press the **Lookup** button next to the **Find by subject** search box.

lesources Sul	oject Term Lookup	
Filter:		
Subject Term	Source	Γ
Alzheimer's disease Etiology	lcsh	
Alzheimer's disease Patients Day Care	. Icsh	Г
American poetry 20th century	lcsh	
Beta testing	Dictionary of Occupational Titles	
Brawley (Calif.)	lesh	
Chilaquiles	Art & Architecture Thesaurus	
Ethnology Papua New Guinea Morehea	. Icsh	
Ethnology Papua New Guinea Western .	lcsh	
Imperial County (Calif.)	lcsh	
Imperial Valley (Calif. and Mexico)	lcsh	
Irrigation water California, Southern	lcsh	
NievesRompope	Dictionary of Occupational Titles	
Pathologists Biography	lcsh	
Technology and stateUnited States.	lcsh	
Technology assessmentUnited States.	lcsh	
Technology assessment.	lcsh	
Water resources development California,	. Icsh	
Water rights California, Southern History	/ lcsh	
Water transfer California, Southern	lcsh	-

- b. Use the scroll bar to browse through the subjects, or the **Filter** box to narrow down the list.
- c. Once the desired subject is located, select it by double clicking on the entry or by clicking the subject term once and pressing the **Select** button. The **Find by subject** search box will now contain the desired subject term.

Find by location:

a. Press the **Lookup** button next to the **Find by location** search box.

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Building	Floor	Room	Coordinates
Chrysler	47	B	Coordinates
Forrester	2nd	47	Coord 1 23
Forrester	2nd 2nd	47	Coord 1 23
Forrester	2nd 2nd	47	Coord 1 25
Forrester	2nd 2nd	47	Coord 1 26
Forrester	2nd	47	Coord 1 27
Forrester	2nd	47	Coord 1 28
Forrester	2nd	47	Coord 1 29
Forrester	2nd	47	Coord 1 30
Forrester	2nd	47	Coord 1 31
Forrester	2nd	47	Coord 1 32
Forrester	2nd	47	Coord 1 33
Forrester	2nd	47	Coord 1 34
Goodyear	1st	2B	

- b. Use the scroll bar to browse through the locations, or the **Filter** box to narrow down the list.
- c. Once the desired location record is located, select it by double clicking on the record or by clicking the record once and pressing the **Select** button. The **Find by location** search box will now contain the desired location.

Find by deaccession date:

- a. There are two **Find by deaccession date** search boxes, one for the begin date and one for the end date. Enter the earlier date in the first box, following the preferred date format for the application.
- b. Enter the later date in the second box, following the preferred date format for the application.

1				×
Resources	Search Editor			
Search resources:				
Select a field Select a field	Begins with Begins with			and 💌
🔲 Include comp	ponents in search			
			Cancel	Search
Search by linked rec	ord:			
Find by name		Lookup	Clear	Function
Find by subject		Lookup	Clear	
Find by location		Lookup	Clear	
Find by deaccess	ion date 1/1/2006 - 8	3/31/2006		
Find by note text				
Find by instance (type 📃			
			Cancel	Search

Find by note type (for resource records only):

a. Enter the note text for which you are searching and click **Search**.

1		×
Resources	Search Editor	
Search resources: Select a field Select a field	Begins with Begins with Begins with Begins with Begins with Begins with Begins with	and 💌
📕 Include comp	onents in search	Cancel Search
Search by linked rec	ord:	
Find by name		Lookup Clear Function
Find by subject		Lookup Clear
Find by location		Lookup Clear
Find by deaccess	ion date	
Find by note text	arranged by the collector	
Find by instance I	type	
		Cancel Search

b. The search return screen will list all of the resource records that have note(s) which contain the text searched upon.

Find by instance type (for resource records only):

c. Open the **Find by instance type** drop-down list.

d. Select the type of instance you wish to search

1		×
Resources	Search Editor	
Search resources:		
Select a field Select a field	Begins with Image: Constraint of the second secon	nd 💌
Include componer	ants in search	
	Cancel Search	
Search by linked record:		
Find by name	Lookup Clear Function	-
Find by subject	Lookup Clear	
Find by location	Lookup Clear	
Find by deaccession d	date -	
Find by note text		
Find by instance type	Audio Cancel Search Books Computer disks / tapes	
	Digital object Graphic materials Maps Microform	

Note: Searching by instance type may require more time than other types of searches.

4. Once the desired fields have been populated, press the **Search** button immediately below the linked record search fields.

Tip: The **Search Editor** has "sticky" values in order to easily refine a search. This means that once a search is completed in a functional area, the search values remain the next time you press the **Search** button for that functional area. The last search data for a given area remains until the application is closed and restarted.

If you wish to quickly clear a linked record search, press the **Clear** button next to the appropriate field.