

# 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.

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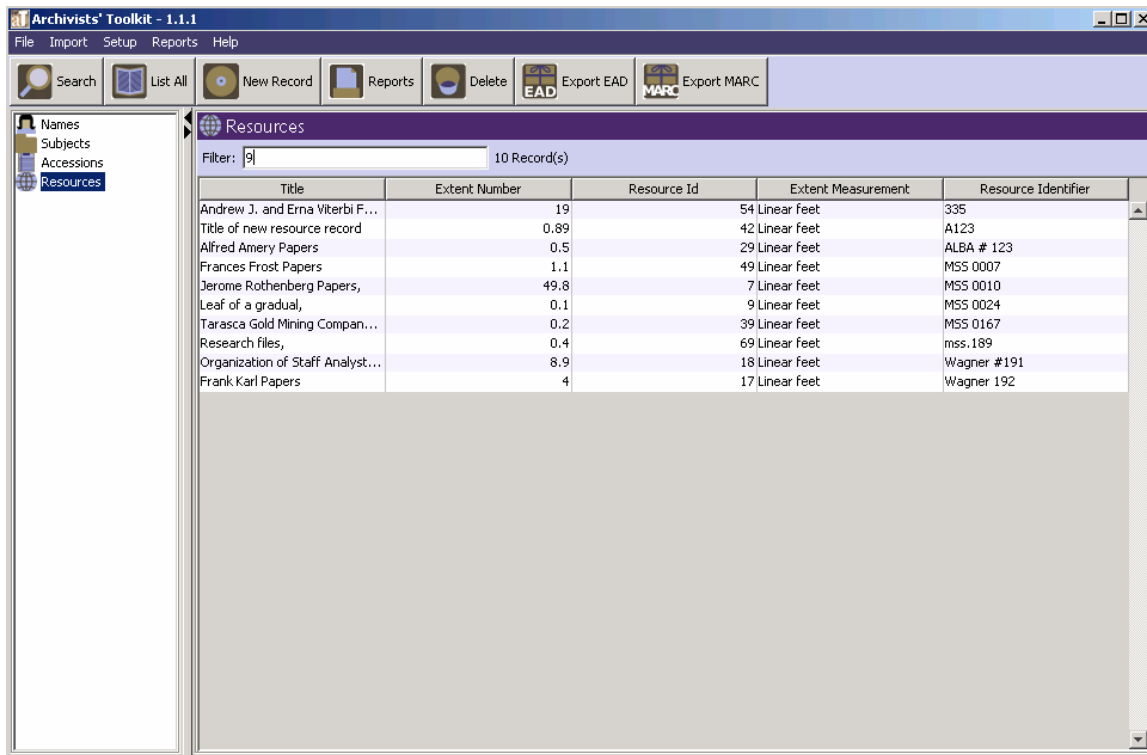
Note: The search interface includes a number of default search fields. These can be customized for a given repository. A list of the default fields in the search editor is available in the appendices. More information about customization is available in Chapter 15.

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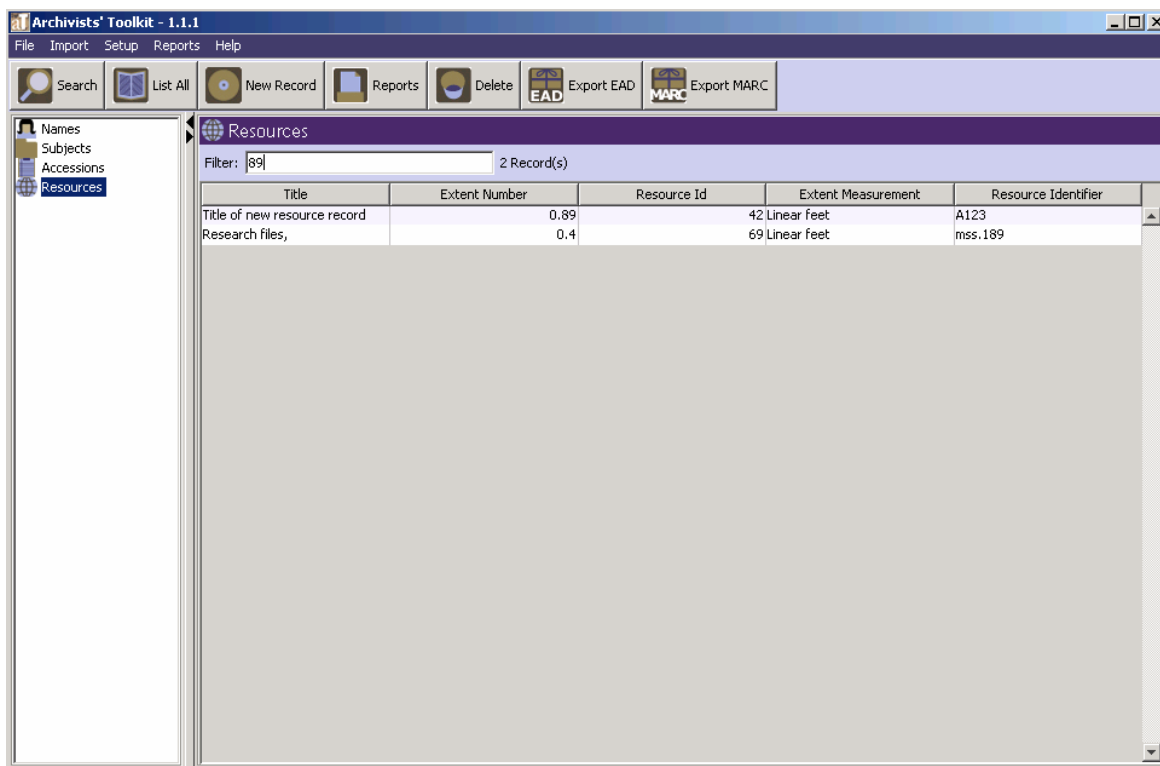
### Filtering record lists

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**.



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.



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.

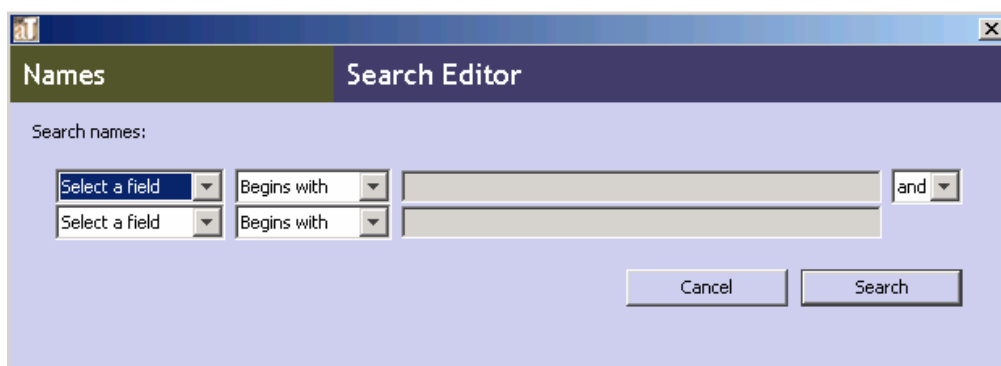
## Basic searching in all records

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.



3. **Select a field** to search.

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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.

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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

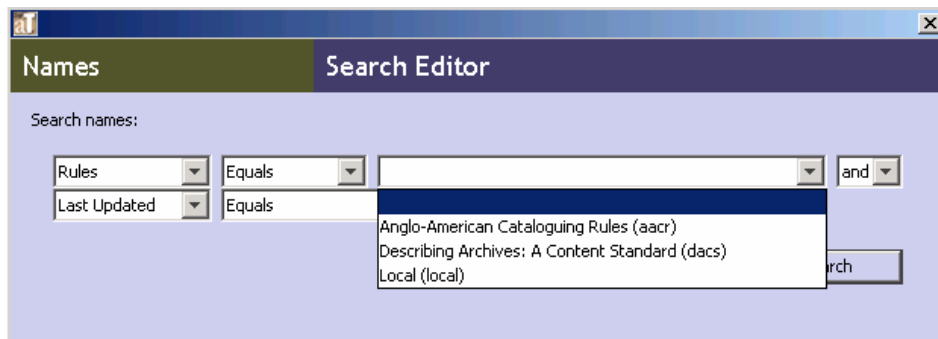
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Note: Date searching requires that the date(s) entered be in the format established for the application. If you enter a date in the wrong format, the Toolkit may try to convert that date to the appropriate format, leading to an unexpected search. To 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.

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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.




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

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

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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.

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## 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.

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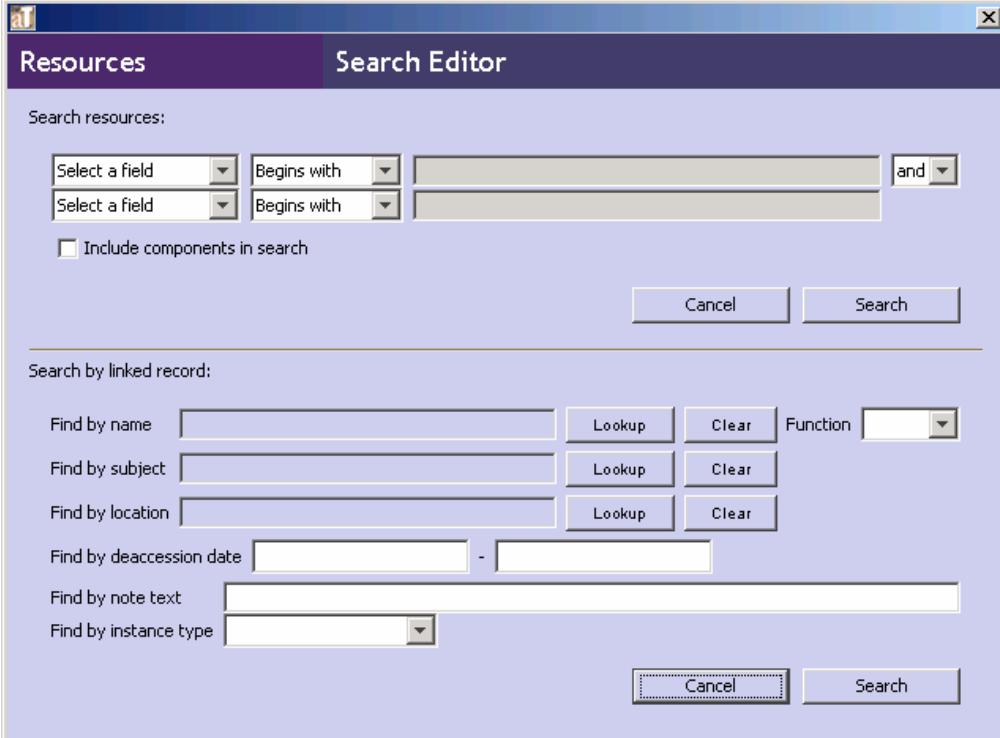
Note: The two search areas of the search tool for Accessions and Resources operate independently of each other. It is not possible to combine search parameters from the top and bottom areas of the screen.

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To search by linked records:

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

2. Press the  button.



Resources Search Editor

Search resources:

Select a field Begins with and

Select a field Begins with

Include components 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 date -

Find by note text

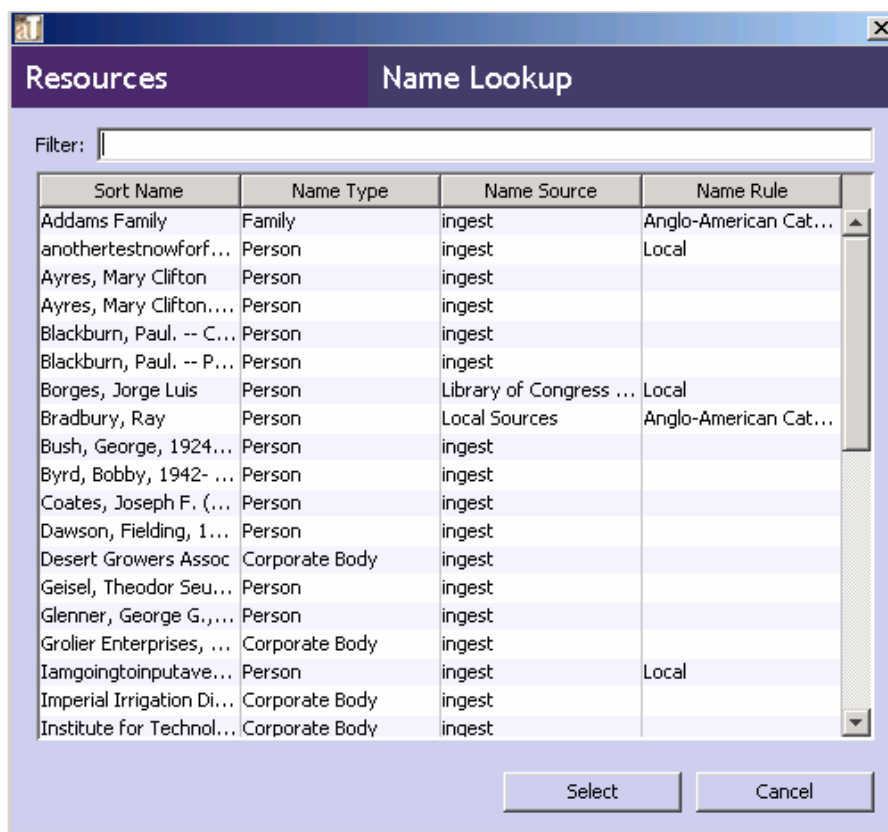
Find by instance type

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:**

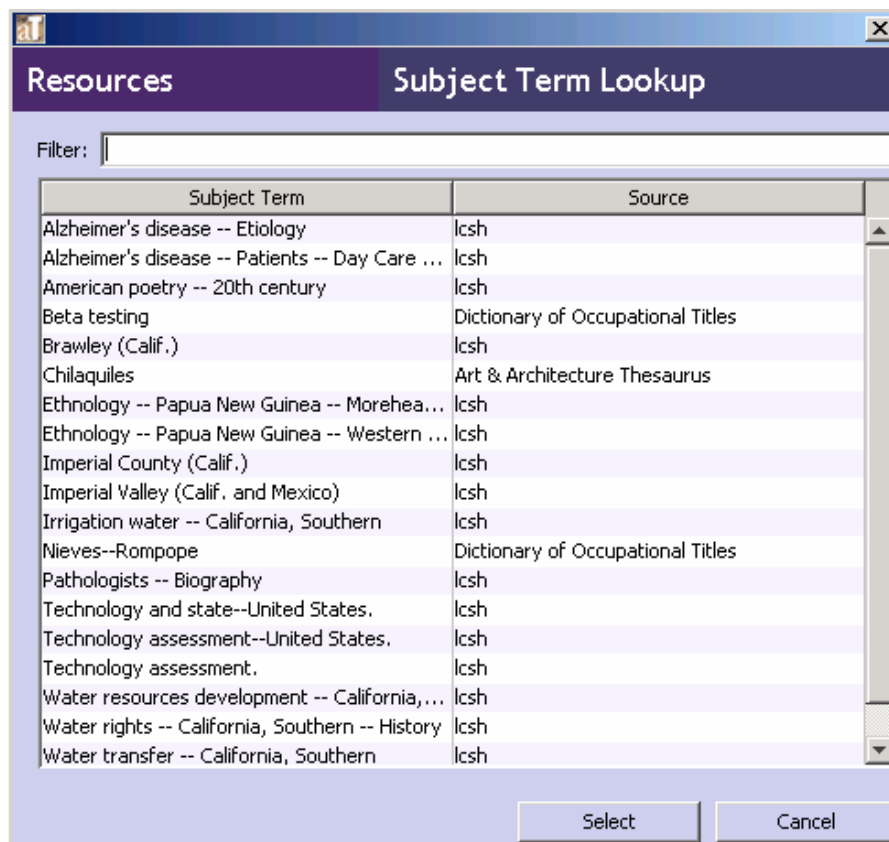
- a. To search for creator, source, or subject name, press the **Lookup** button next to the **Find by name** search box.



- 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.

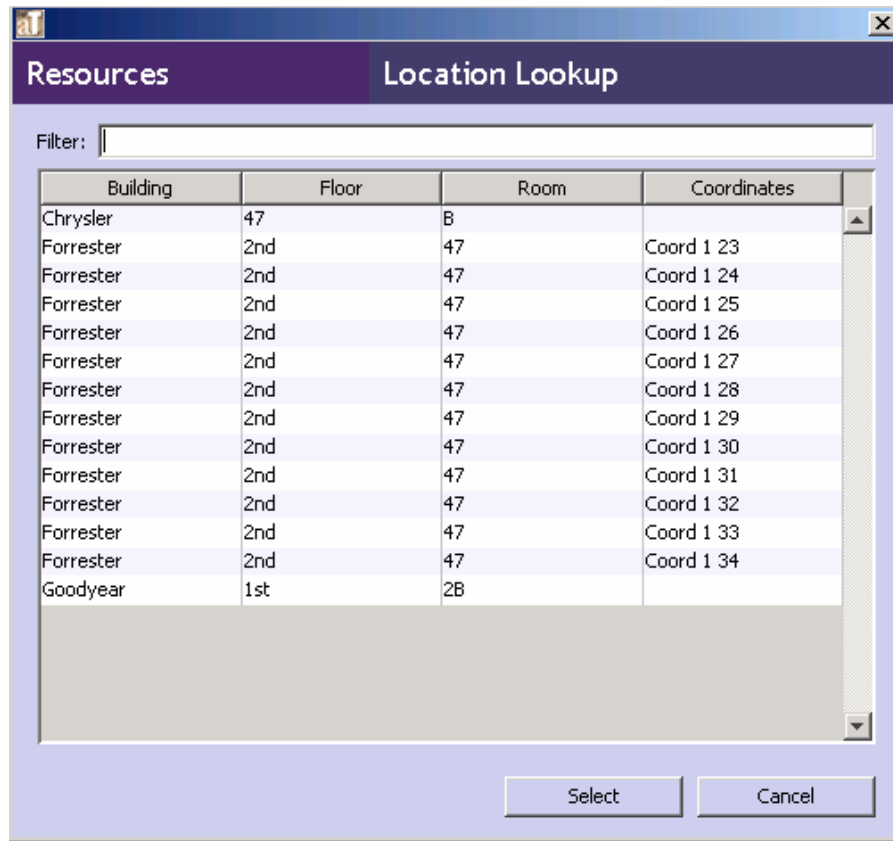


- b. Use the scroll bar to browse through the subjects, or the **Filter** box to narrow down the list.
- c. Once the desired subject is located, select it by double clicking on the entry or by clicking the subject term once and pressing the **Select** button. The **Find by subject** search box will now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

**Find by location:**

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





- 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.

The screenshot shows the 'Search Editor' window with the following fields and options:

- Search resources:** Two rows of search criteria. Each row has a 'Select a field' dropdown, a 'Begins with' dropdown, a text input field, and an 'and' dropdown.
- Include components in search
- Buttons: Cancel, Search
- Search by linked record:**
  - Find by name: [text input] [Lookup] [Clear] Function [dropdown]
  - Find by subject: [text input] [Lookup] [Clear]
  - Find by location: [text input] [Lookup] [Clear]
  - Find by deaccession date: [1/1/2006] - [8/31/2006]
  - Find by note text: [text input]
  - Find by instance type: [dropdown]
- Buttons: Cancel, Search

**Find by note type** (for resource records only):

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

This screenshot is identical to the previous one, but the 'Find by note text' field now contains the text 'arranged by the collector'.

- 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

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

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

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**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.

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