

# Searching

Search can be set up with either SIMPLE Search or ADVANCED Search or a combination of both.

The Search screen can be configured to provide the user with the facility to search by individual fields, as well as to execute a single search across All Fields.

The SIMPLE Search function is sometimes labelled "All Fields" because it can execute across all fields in the database. It operates similar to a "Google-like" Search function. Fields can be nominated for inclusion in Simple Search. The main database record and sub-records that describe physical copies can be searched. Attached documents in digital formats such as PDFs, Word or Microsoft office documents can also be searched either as part of a SIMPLE Search or searched exclusively.

The End User will most probably be presented with the same search functionality but in the **Search Portal** which is customised using the Search Portal Template Designer. This Help Guide section describes the set up of Search in the Administrative function and the OPAC display.

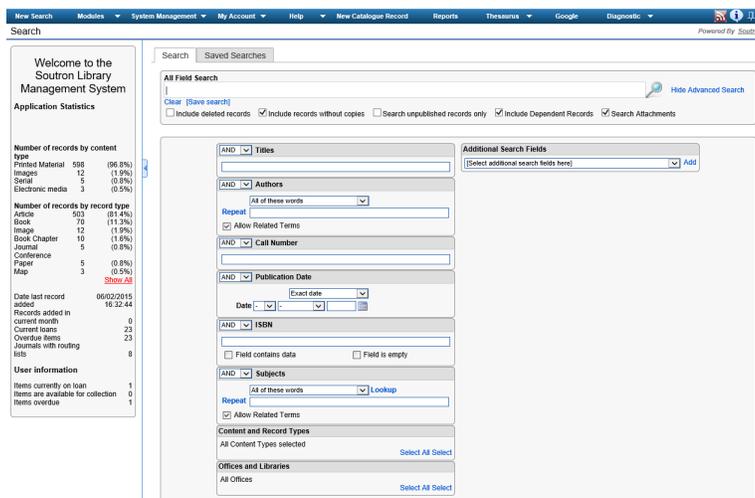
 The fields which appear on the search screen are defined in [Content Type Maintenance](#).

This page describes:

- [Types of Search Field](#)
- [Using AND, OR, NOT operators](#)
- [Additional Search Fields](#)
- [Subjects Search](#)
- [Content and Record Type selection](#)
- [Office and Library selection](#)
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When the application is opened by an Administrative user, the Search screen is displayed with the Welcome Message area and menus and functions that the Administrative User has been assigned according to the role and access permissions granted by the System Administrator.

This page is referred to as the HOME page. It is displayed within the SEARCH tab.



The Simple and [Advanced Search](#) options are usually displayed. This presents the Simple Search (also referred to as All Fields) and Advanced Search options that consist of Fields and Field Groups that can be combined into a Search Strategy using Boolean operators. To see only the All Fields Search box, [click Hide Advanced Search](#).

 The wording for Show / Hide Advanced Search can be changed in [Resource String Translations](#)

Search terms (Words or Phrases) are entered in the search fields. This can be a single word or a combination of words.

Click **[Clear]** to start again and clear any terms entered into the field boxes or select the term and press backspace or delete on the keyboard.

 The wording for the Clear option can be changed in [Resource string translations](#)

To begin a new search, click **Home** or **New Search** on the menu.

The [Saved Searches](#) tab lists all predefined searches. These are search strategies that have been saved so that they can be repeated to find a set of records from the database without having to re-enter words or phrases or combine fields in a search strategy.

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## All Fields search

The All Fields search box searches across specified fields from the database that are used to record data - *these are defined in [Field Maintenance](#)*.

The Search also performs Full Text searching of [documents](#) that have been attached to a record and uploaded into the database. Full text searching is described in detail in a [separate document](#).

 The description "All Fields" can be changed in [Resource string translations](#)

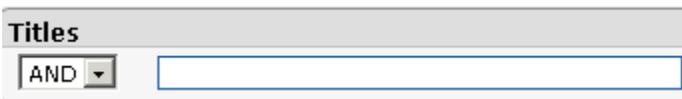
## Types of search field

There are four types of search field:

Text fields are enabled for word searches to be performed, and include fields such as Title or ISBN. Simply enter a search term into the field and press Carriage Return or click on the eyeglass icon.

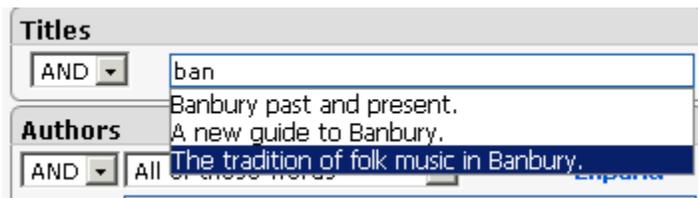
A Text field may also be presented with more than one field defined. This is called a Field Group, where the search is executed across all fields that are within the Field Group.

A Rich Text Field stores and indexes data the same as a Text field and is searched the same but allows formatting of the text, retaining any HTML markup that might have been made to the text.



The screenshot shows a search interface for a field titled "Titles". It features a dropdown menu set to "AND" and an empty text input box.

If [Use Suggestion](#) has been enabled by the System Administrator, as text is typed into a Text search field, a drop-down list of matching entries is presented automatically, from which the required entry can be selected:



The screenshot shows two search fields. The first, titled "Titles", has a dropdown set to "AND" and the text "ban" entered. A list of suggestions is displayed below it: "Banbury past and present.", "A new guide to Banbury.", and "The tradition of folk music in Banbury.". The second field, titled "Authors", has a dropdown set to "All of these words" and the text "The tradition of folk music in Banbury." entered.

Lookup Fields refer to a thesaurus where terms can be selected from a predefined list.

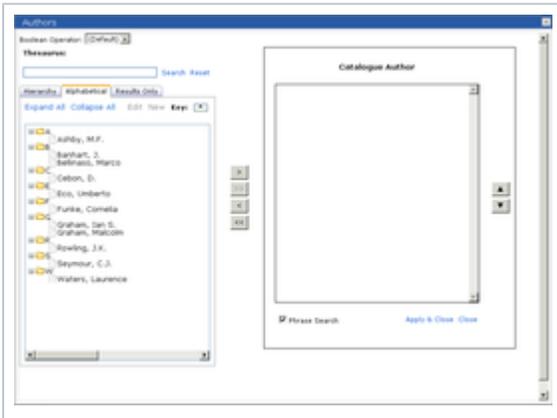
## Entering search terms manually

After the first three characters of a search term have been entered into the Lookup Field, the system presents a list of possible matches from which one can be selected.

Highlight the term required and press **Enter** to paste the term into the field.

## Using the thesaurus lookup

Alternatively, terms can be selected from the thesaurus by clicking **Lookup**. The thesaurus then opens:



Depending on how the thesaurus has been set up, the terms will be displayed in either hierarchical or alphabetical view. To see all terms, click **Expand All**.

Click on the term you want to use in the search and then click on the > arrow or double-click to paste it into the search box on the right hand side. Repeat this to include multiple terms in a search.

By default the system will apply the AND operator between the terms; it can however be changed by selecting either the OR or NOT operator.

Finally, click **Apply & Close**.

You will be returned to the Advanced Search, with your selected search terms pasted into the relevant field.

## Specifying how the search terms will be applied

You can specify how the search terms will be applied. The options are:

Search type	Description	Examples
<b>All of these words</b>	Search for records with all of the search terms in the field, in any order, anywhere within the field	"marketing" also finds "market"
<b>Exact wording or phrase</b>	Search for records with all of the search terms in the field, in the exact order specified	"marketing" finds just that, ie it will not also retrieve "consumer marketing"
<b>Starts with</b>	Search for records starting with the search terms	"consumer" finds "consumer marketing", "consumer spending" etc

## Adding additional terms

To add additional terms to the search in this field, click **Expand**. This adds another search box, into which you can enter terms in the same way.

Change the AND/OR/NOT drop-down as required. You can continue expanding the search as needed.

## Including related terms

Thesaurus fields can have a tick box option to also retrieve records which have been tagged with related terms:



Whether this search option is allowed is defined in OPAC Maintenance ([Options](#))

## Including narrower terms

As well as the search term specified, the system can find records which contain narrower terms of that term. For example, a taxonomy hierarchy has:

Marketing

[Exhibitions](#)

[Trade Fairs](#)

then if this option is enabled, it will find records with any of those terms.

If the option is not enabled, only records will be found with the term you entered.

 The option "Traverse Down Term Hierarchy" is enabled using System Configuration Maintenance ([Common Settings](#))

## Searching for fields which are empty or contain data

Search for records where fields are either empty or contain data. This must be enabled in [Field Maintenance](#)

Tick the relevant option before searching.

 The option is enabled for a particular field in [Field Maintenance](#)  
Whether this search option is allowed for End Users is defined in [OPAC Maintenance \(Options\)](#). This option is always available for Administrator staff

Date fields enable a period, a range of dates or a specific date to be searched.

There are three options for searching dates:

Exact date	To search for a specific date, select the year first, then add the month and then the day. Alternatively, you can enter just a year, or click on the calendar icon to pick the date.
Period	This allows you to search over a period of time such as Day, Week, Month, Quarter, Year, and specify the number, for example 3 weeks. <div style="border: 1px solid green; padding: 5px; margin-top: 10px;"> This feature allows you to create saved searches of recent additions to the catalogue</div>
Start and/or end dates	You can enter a Start Year or End Year or combination of the two. You can search up to the present by leaving the end date empty.

As well as displaying records that match your date criteria, records with circa dates within a range of years will also be included.

 The number of years in the circa dates range is defined in System Configuration Maintenance ([Common settings](#)).  
The default search option is defined in [Field Maintenance](#).

Number fields, such as CID (Computer ID), can be searched using ranges:



To search for a single number, enter the number into the From box and tick the "Search single" box.

There are also some search boxes which search across a group of fields at the same time. Note that thesaurus fields in field groups do not have the [lookup facility](#) that they have if they are presented individually on the search screen.

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## Using Boolean operators (AND, OR, NOT)

To build a search using a combination of terms across fields, use the appropriate AND/OR/NOT drop-down boxes to the left of most fields.

**i** Whether or not Boolean operators are enabled for all users is determined in [OPAC Maintenance \(Options\)](#)

[Search syntax](#)

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## Additional Search Fields

This drop-down list contains a list of additional fields that can be selected for inclusion in an Advanced Search.

**i** The fields which appear in the Additional Search list (if any) are defined in [Field Maintenance](#).

Note also that fields defined as not public will not appear in this list for End Users.

If no fields have been defined for this function, the drop-down list will not appear at all.

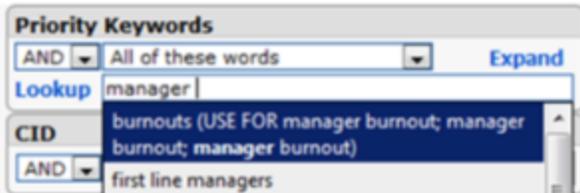
1. From the drop-down list select a field to search and then click **Add**. The field you selected is displayed with an input box.
2. Enter your search words into the field as normal
3. To include another field, repeat step 1
4. To remove an Additional Search field, click X
5. To remove ALL Additional Search field selections, click **Remove All**

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## Suggestion

If Suggestion has been enabled, by typing into a Text or Thesaurus field or Text/Thesaurus field group, the system will present a drop-down list of matching entries from which the required entry can be selected.

In thesaurus fields, "Use For" options are displayed:



To search on the entry typed in, ignoring all the suggested entries, simply click on the Search icon.

**i** Suggestion can be enabled at a field or field group level, and per OPAC, and is defined in [System Management](#).

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## Content and Record Types selection

Records in the database are defined as [Record Types](#). A Record Type and must be assigned to a broader category called [Content Types](#). For example the Content Type "Library" may contain Record Types of Book, Serials, Reports, Directory, etc.

It is possible to conduct a search by specifying the required Content and Record Types. All Content and Record Types are included in the search unless otherwise specified.

**i** The option to allow an End User to restrict a Search by Content Type and or Record Type is defined in [OPAC Maintenance \(Options\)](#)

## Content and Record Types

All Content Types selected

Select All [Select](#)

To select one or more Content Types or Record Types, click **Select**.

The required Types can be selected by expanding the categories and ticking those to be included.



Click **Save**, to be returned to the search screen and the search can be executed, applying the restricted Content and Record Types.

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## Office and Library selection

Narrow the search by specifying the only records from a specific [Office](#) or [Library](#) are to be included in the Search results. All locations are included unless otherwise specified. Note It is not possible to refine a search by [SubLocations](#).

 Whether this feature is present or not is defined in [OPAC Maintenance \(Options\)](#)

## Offices and Libraries

All Offices

Select All [Select](#)

To select one or more Office or Library, click **Select**.

Select the required Offices/Libraries by expanding the categories and ticking those to be included.



Then click **Save**, to return to the search screen.

 The wording for Office / Libraries can be changed in [Resource string translations](#)

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## Volumes

Volumes are a special type of record that have a structure built into the database so that multi-volume sets can be easily managed and controlled. By default, Volume records are not retrieved as part of a search, although the master record that a Volume belongs to is returned by a search.

 This feature is turned on/off in System Management > Common Settings

However, when this feature is turned on, if a Volume contains words that are included in the search, then the Volume record will be returned as a record in its own right in the search results and it will also show the title of the master record as a concatenation of the master record title and the title of the Volume record. In the display of Brief Results, any record that is a Volume will be indicated by a Volume icon.

 Note that at present you cannot specific a search for words or phrases that appear in both the master and volume record.

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## Other search options

Administrative staff have a number of search options that are unavailable to End Users:

These are:

<b>Include deleted records</b>	<p>Deleted records remain in the system but are not seen by End Users and are only visible to Administrative staff users if this box is ticked.</p> <p>Tick this option to include deleted records in the search.</p>
<b>Include records without copies</b>	<p>Tick this option to include records without copies in the search, or untick to exclude them.</p> <p><i>The default for this option is defined in System Configuration Maintenance (<a href="#">Common settings</a>).</i></p> <div data-bbox="516 947 1482 1058"><p> If a search is filtered by Office and/or Location, and if this option is ticked the search will retrieve all records without copies, as well as the ones with the location selected. Untick the option to stop this happening.</p></div>
<b>Search unpublished records only</b>	<p>By default all searches include unpublished records for Administrative staff users: tick this box to search *only* unpublished records.</p> <p><i>Whether you have access to non-published records or not is defined in <a href="#">Access Permissions</a>.</i></p>

There are other options which are also available to End Users, depending on the settings in OPAC Maintenance > Options:

<b>Include Dependent Records</b>	<p>Tick this option to include amendments in the search, or untick to exclude them.</p> <p><i>The default for this option is defined in OPAC Maintenance (<a href="#">Options</a>).</i></p> <p><i>The wording for this option can be changed in <a href="#">Resource string translations</a>.</i></p>
<b>Search Attachments</b>	<p>Tick this option to include the text of attached documents in the search, or untick to exclude them.</p> <p><i>The default for this option is defined in OPAC Maintenance (<a href="#">Options</a>).</i></p>

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## Subjects Search

**Additional Search Fields**

[Select additional search fields here] Add

AND Subjects Search

Use Ctrl to select more than one term

Children's fiction  
Cornwall  
Fiction - science fiction  
Spanish language

Apply AND between terms  
 Allow Related Terms

This option presents a list of terms from a thesaurus that can be used to do a quick subject search. Click on the term to search and click **Search**.

The terms that appear in this panel are defined in the Thesaurus module.

 Whether this feature is present or not is defined in OPAC Maintenance ([Options](#))

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## Executing the search

Once search terms have been entered, either click **Search** or press Enter on your keyboard.

The search results are displayed in the [search results](#) screen, or if only one record is found, the [Full Record](#) screen is displayed. Where no results are found, a "No records found" message will display.

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### See also

[Using saved searches](#)