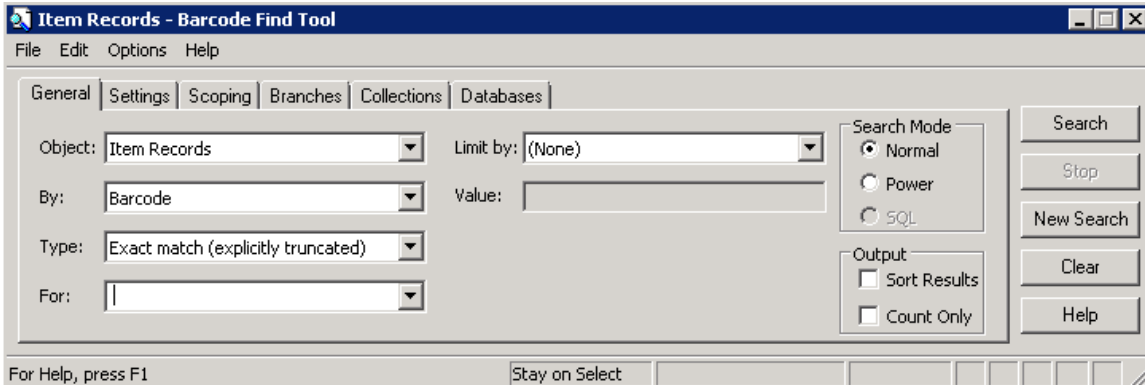


# Find Tool

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You use the Polaris Find Tool to search for existing records and to perform actions with these records without having to open them. You can use the Find Tool to do a basic search, or you can use various options to narrow your search more precisely.

## Doing a Basic Search



The Find Tool appears when you select a record type from the Polaris Shortcut Bar, or when you click **Find** on workforms and dialog boxes. You select the type of record you are searching for, the criteria you want to search by, the type of search, and then type the word or phrase that you want to use for your search.

In addition, various options on the Find Tool let you narrow your search and specify how you want the results to display. You can limit your search to specific formats, display only a count of the records found, or display the results in a list.

You can have multiple Find Tools open at once. The title bar of each Find Tool displays the object and access point selected for that search. For example, if you are searching for an item record by barcode, the title bar displays **Item Records - Barcode Find Tool**. When you minimize any Find Tool, a tooltip displays the title of the Find Tool in the taskbar at the bottom of the screen.

## Setting up a Search

A search query is a structured request for database information. The simplest query uses default settings, and you just type a word or phrase to describe the records for which you are looking. This word or phrase might be, for example, a full or partial title, the last name of an author, or a patron's name.

A standard search query on the Find Tool requires the following four criteria:

1. **Record (Object box)**

The record types that you can select in the **Object** box depend on the menu option, workform, or field where you accessed the Find Tool. For example, in a Check Out workform, if you click **Find** in the Name field, the Name Find Tool opens with **Patron Record** in the **Object** box.

2. **Access Point (By box)**

You select the access point of the record for which you are searching in the **By** box. The access points in the selection list depend on the record type you selected in the **Object** box. For example, access points for bibliographic records include (among others) **Title**, **Author**, and **Subject**. You can set your own default **By** access point for each record type. Then, whenever you log on with your user ID and search for a record using the Find Tool, the search **By** option is automatically set for the record type.

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### 3. Type of Search (Type )

- **Exact match (implicitly truncated)** - Displays all the records beginning with the letters or numbers in the **For** box.  
**Example:** Type **energy** in the **For** box for a bibliographic title search. The results list includes all titles that begin with *energy*.
- **Exact match (explicitly truncated)** - Displays only the records that exactly match the letters or numbers in the **For** box.  
**Example:** Type **energy** in the **For** box for a bibliographic title search. The results list includes only items titled *energy*.

### 4. Search String (For)

You specify the search string in the **For** box by typing one or more characters. Polaris ignores letter case, multiple spaces, and all punctuation (except quotation marks) entered in the **For** box.

### Limit By

You can limit your search to narrow down the results. For example, you can search for a title and limit the format to **DVD**. Some **Limit by** options have pre-set selections in the **Value** box. For example, if you select **Language**, a list of languages appears in the **Value** box. If you select **Author**, you type the author's name in the **Value** box.

### Setting and Using Search Results

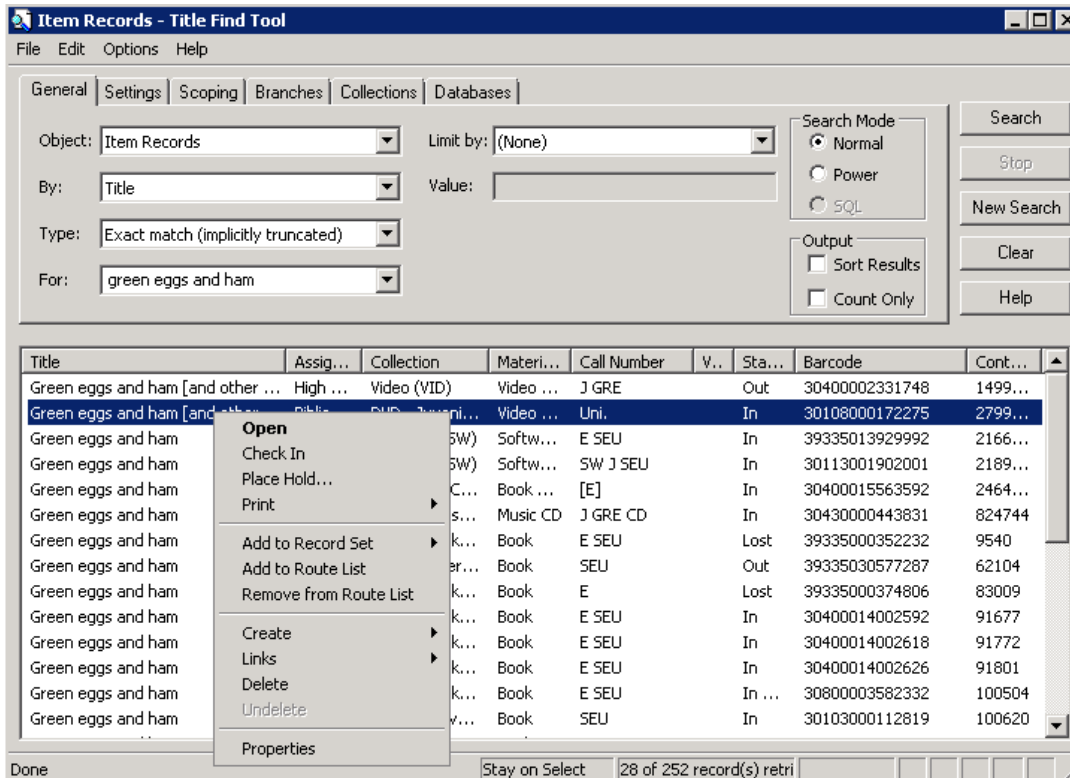
You can set the Find Tool to display a count of the records that match your search criteria, or you can display the records in the results list. The number of records that appear in the results list depends on the retrieval limits set in System Administration, but you can change this limit in the Find Tool. You can also change the maximum number of records you want sorted when the results are displayed (e.g. search for Smith may require more than 1000 default limit)

When you do a keyword or phrase search for bibliographic or authority records, all the bibliographic or authority records are checked for relevancy. Then, the most relevant records are returned in the results list according to the retrieval limits.

**Note:** After you retrieve the results, you can sort them by the column headers, and print the results.

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## Use the context menu (right click) in the Find Tool results list



Follow these steps to perform actions on records from the Find Tool results list without opening the records.

1. Search for the record or records using the Find Tool.

The records are displayed in the results list.

2. Select the record and right-click.

The following options may be available depending on the record type:

**Note:** Not all options are available for all types of records, and some options are available only for specific records. For example, in bibliographic records from the Find Tool results list.

- **Select** – Choose this item
- **Open** - Opens the record in the appropriate workflow.
- **Preview** - See bibliographic records in a small window, as they would appear in TRACpac. Also, see circulation statistics and all the linked item records in one view.
- **Properties** - Display a dialog box with information about the record.

### Set Find Tool results limits

The larger the number of records that are retrieved and displayed in the results list, the slower the retrieval time. In addition, displaying records in a sort order slows down retrieval time. To ensure optimal performance, you can set retrieval and sort limits. You can also increase the amount of time the system will search before timing out. Follow these steps to specify how you want retrieval results to be handled.

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1. Open the Find Tool.
2. Create your search query, but do not click **Search** yet.
3. Select the **Options** tab.

If you want to change the default settings, do the following:

- Type another number to change the number of records that are retrieved in the **Retrieval Limit** box. The default limit is set in Polaris Administration with the profile **Find Tool: Default number of records to return in a result set**.
- Type another number in the **Sort Limit** box. This changes the number of records that are sorted when they are retrieved in the Find Tool. The default sort limit is set in Polaris Administration with the profile **Find Tool: Do not automatically sort if the result set is greater than**.
- Type another number in the **Search Timeout (sec)** to increase or decrease the amount of time (in seconds) that the system will search before timing out. The default is 30 seconds.  
**Tip:** If you want Polaris to sort records, you must select the **Sort Results** check box on the Find Tool's General page.
- Check or clear the **Use Initial Articles** check box. If this box is checked, the initial article in a title is ignored if that article is defined in the Initial Articles table (see "Defining Leading Articles" in the *Polaris Administration Guide 3.3 (Updated)*). The check box is active for title and series searches for certain types of records. If the initial article table is not used for the search type, the check box is inactive.

### Print search results

You can print the Find Tool results list directly from the Find Tool. Follow these steps to print search results from the Find Tool.

1. Search for the records using any of the search options available.  
The records are displayed in the Find Tool results list.
2. Select **File, Print**, and select a print option

\*\*More detailed information about the Find Tool can be found in Updated Basics Guide – Finding Polaris Records (Help – Online Documents)