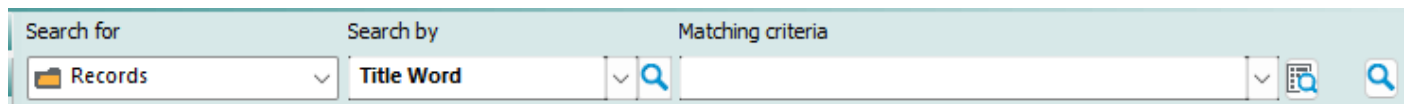# HOW TO SEARCH

Did you know there are multiple ways to perform a search in TRIM? You can search on most of the information about a record that is saved in TRIM.

There are simple search methods and more complex searches that allow you to combine criteria in a more sophisticated manner.
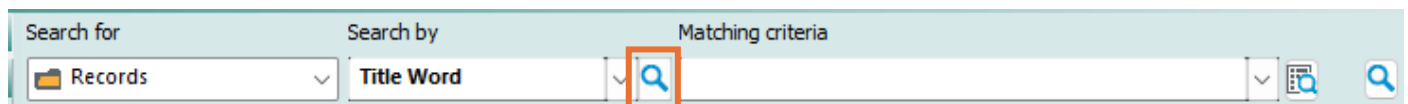
SIMPLE SEARCH
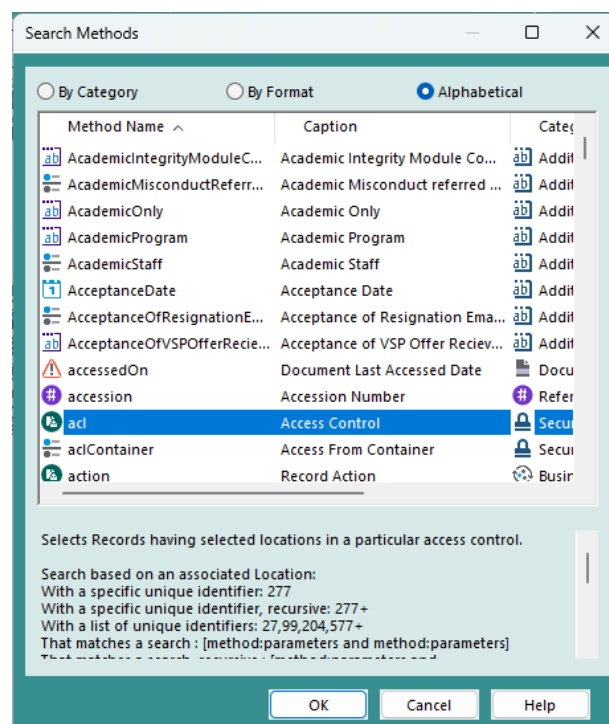
In TRIM, go to the **Find Records** Pane:

- **Search For:** Select a search type e.g. **Records**

- **Search By:** Select a search method e.g. **Title Word**

- **Matching Criteria**: Enter a value for the search method (e.g. student administration prizes)

- Select the **Find** 🔍 button to run the search

SEARCH METHODS

Clicking the blue magnifying glass icon for the 'Search By' field will allow you to navigate to and select any available search method in TRIM as shown below. The search methods are displayed 'By Category' by default, however you may wish to display the search methods in alphabetical order by selecting the 'Alphabetical' option:

As you search for and use additional search methods, they too then appear in the 'Search By' drop down list, as shown below:
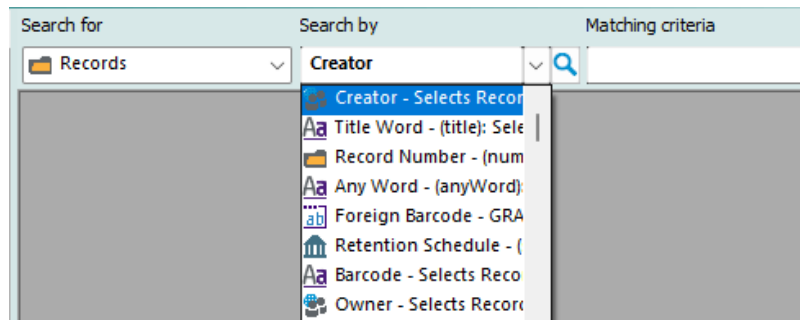
Popular/Recommended search options to add to the 'Search By" field drop down list are:

- **Creator** – located under the 'Contacts, People and Places' category
- **Any Word** – Searches the Record Title and the Notes field – located in the 'Text Search' category
- **Document Content** – searches the actual content contained within the document – located in the 'Text Search' category

REFINE YOUR SEARCH

Simple searches often return a lot of results, so the search might need to be refined.

- Press **F7** after the simple search has returned results to refine the query
- The **Find** dialogue box with the current search criteria you have entered is displayed
- Change your criteria and/or add new search methods and click **OK** to refine your search
- Examples of helpful criteria you can search on include:
    - o Date Registered/Created
    - o Creator
    - o Author

Another option to refine your search is to press F7 after you have completed a search and use the **Record Types** tab to refine your search by a particular record type:

- Right-click > **Untag all** to deselect all record types
- Place a **tick** to the left of the record types you want to include in the search results
- Click OK to refine your search:
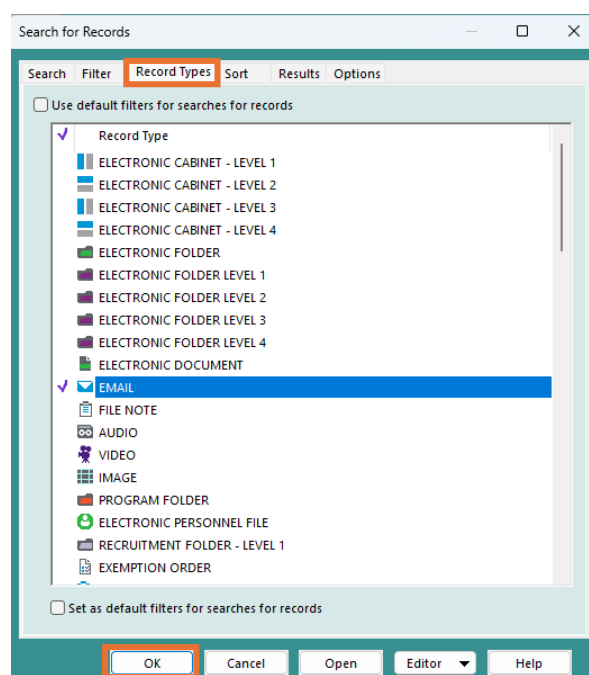
SEARCHING TIPS AND POINTERS

A wildcard * (asterisk) can be used to enhance search terms e.g. Administrat* would return words such as Administration, Administrator, Administrative, Administration's, etc.

Recent Documents and **My Containers** will show the last 25 records that users have worked with
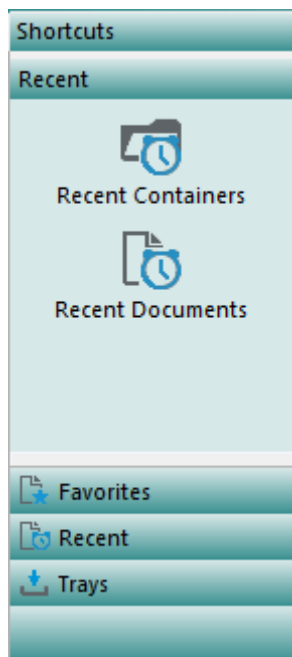
- Add **Records** you frequently use to your Favourites by **right-clicking** on the Record and selecting **Add to Favourites.**
- Use the **Filter** tab to filter the search by specific File Types e.g. PDF or Docs
- Use the **Record Type** tab to filter the search by specific Record Types e.g. Electronic Document or File