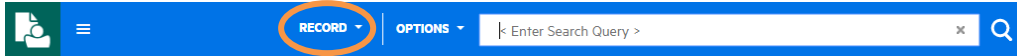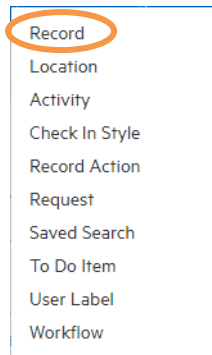THE UNIVERSITY OF
NEWCASTLE
AUSTRALIA

Basic Searching

1. Clicking the drop-down arrow next to the field populated with **RECORD** in the **Search Area** provides a list of numerous objects to search for:


For the vast majority of end users and in the vast majority of scenarios, the 'Search For' field should be left as the default which is Record:
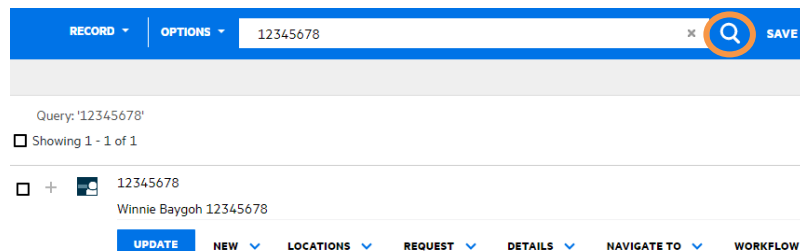

Record
Location
Activity
Check In Style
Record Action
Request
Saved Search
To Do Item
User Label
Workflow

Hint: When searching, should your search results not be as expected, check this field to see if it has been populated with one of the other options contained in the drop-down list, and if so, change back to **Record**.

2. In the < Enter Search Query > field is where you type what you are looking for. E.g. if wanting to search by Record Title you would type keywords relevant to the record you are looking for. If wanting to search by Record Number (such as a student number) you would type the record number you are looking for:
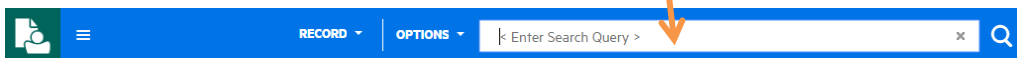
3. Once you are ready to search, press **Enter** on the keyboard, or click on the **magnifying glass** search button to the right of the **Search Area**. Your search results will display under the search area:

Query: '12345678'
☐ Showing 1 - 1 of 1

☐ + 📄 12345678
Winnie Baygoh 12345678

UPDATE   NEW ⌄   LOCATIONS ⌄   REQUEST ⌄   DETAILS ⌄   NAVIGATE TO ⌄   WORKFLOW

Note: Text searches in TRIM9 are not case sensitive. If searching by Record Title you must enter the search terms in the same order that has been used in the title of the record. E.g. If **john citizen** does not return the result you are looking for, try **citizen john** or **citizen, john** or **citizen** instead.

Wildcards

When searching you may use either of the following two wildcards. They can be used at the beginning, the middle, or the end of a word. They are useful for expanding your search results and including misspelt words in your search results:

WILDCARD SYMBOL	FUNCTION	EXAMPLE	
		SEARCH CRITERIA	RESULT
?	To denote a single character	**wa?t**	Would return results for wait, want, wart, waft, etc.
		ch??f	Would return results for the correctly spelt chief and the incorrectly spelt cheif.
*	To denote any string of characters	**wa*t**	Would return a much larger response than the wa?t example above, including all of the above results plus additional results such as walnut, warrant, wackiest etc.
		test*	Would return results for test, tests, tested, tester and testing.

Refine a Search - Filter Record Types

If your search returns too many results, you can refine your search to make it easier to find the particular record you are looking for.

A quick and easy way to refine your search is to search for only the record types that you are looking for, such as a Student Cabinet, a Student Misconduct File or an email. To do this:

1. Click on the **OPTIONS** drop-down button and select **Filter Record Types**:
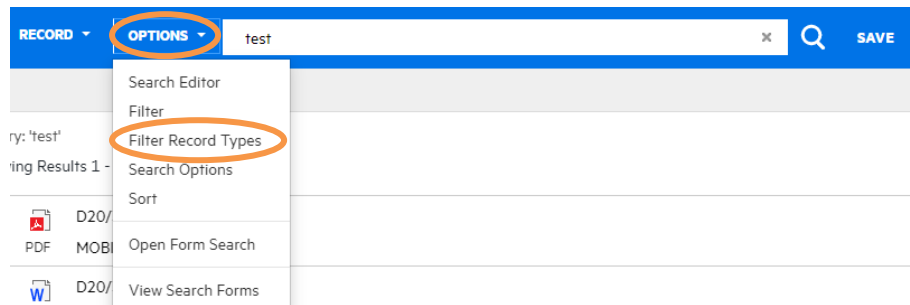
2. The **'SEARCH FILTER – RECORD TYPE'** window will display. Untick the 'Select all' checkbox to remove the tick from each record types check box:

3. Scroll through the list of record types to find the record type(s) you are looking for and select them by clicking in its associated check box:

4. Then click **OK** at the bottom right of the **'SEARCH FILTER – RECORD TYPE'** window:

5. Your search results will now only contain the record type(s) you selected.

Advanced Searching

It is possible in TRIM9 to perform compound searches using multiple criteria and sort your search results. Please see below instructions:

1. Click on the **OPTIONS** drop-down and select 'Search Editor':
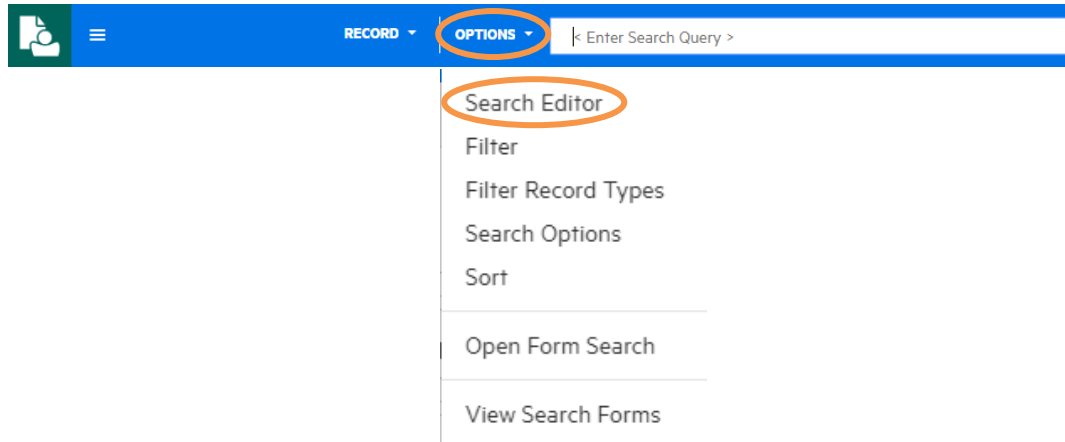
2. The **'RECORD SEARCH'** window will appear. If you have recently run a search the search you conducted will be listed under the **Build Query** section. If you haven't recently run a search then the **Build Query** section will be blank:
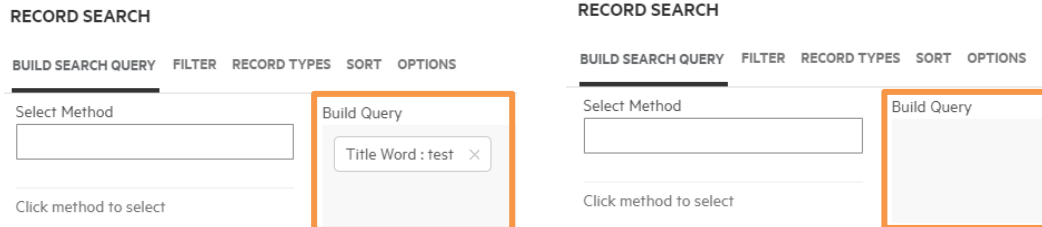
3. The available search methods will appear under the 'Click method to select' field. You can choose to browse them either alphabetically or by category. If browsing by category use the + next to each category to see all the search methods within:
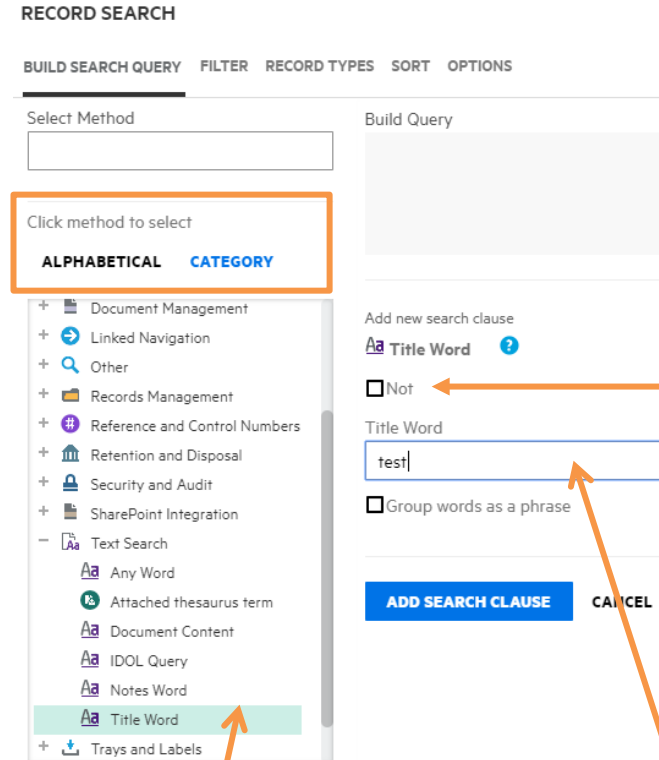
4. Select your search method by clicking it once, then just to the right provide the relevant data for your selected search method.

5. For each search method you include in your search you have the option to use the **NOT** button:

By default TRIM will find search results that match the criteria you have selected. The **NOT** button will instead return results that do not match the criteria selected for that particular search method.
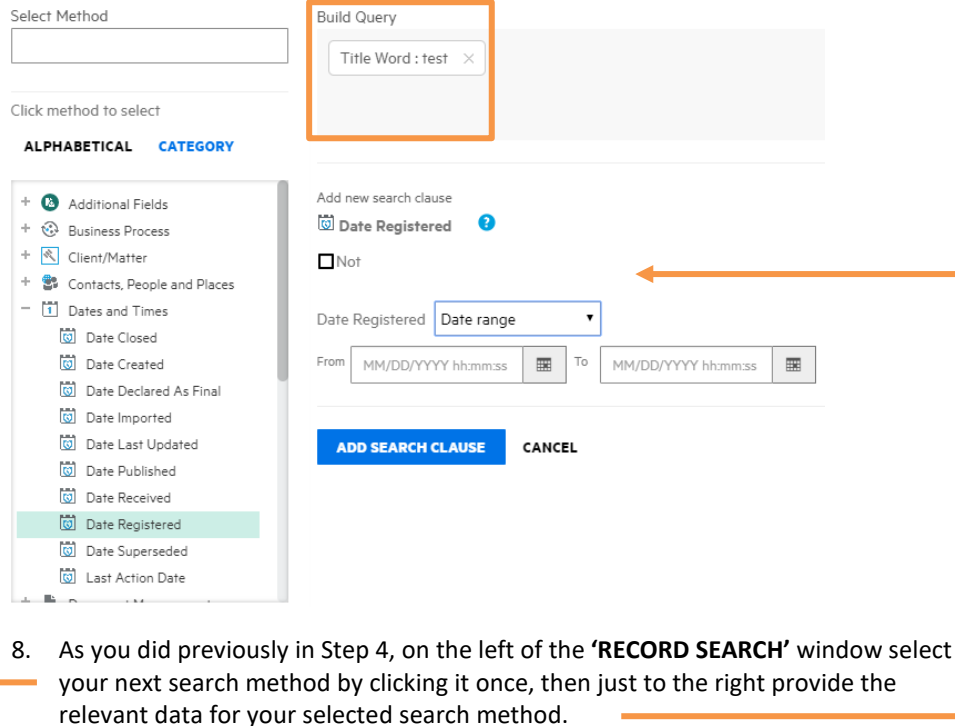
6. Click the **ADD SEARCH CLAUSE** button:

    ADD SEARCH CLAUSE

7. The search method and criteria will be added to the **Build Query** section:

    RECORD SEARCH

    BUILD SEARCH QUERY   FILTER   RECORD TYPES   SORT   OPTIONS

    Select Method

    Build Query

    Title Word : test ✕

    Click method to select

    ALPHABETICAL   CATEGORY

    + Additional Fields
    + Business Process
    + Client/Matter
    + Contacts, People and Places
    – Dates and Times
        Date Closed
        Date Created
        Date Declared As Final
        Date Imported
        Date Last Updated
        Date Published
        Date Received
        Date Registered
        Date Superseded
        Last Action Date

    Add new search clause

    Date Registered ?

    ☐ Not

    Date Registered   Date range ▼

    From MM/DD/YYYY hh:mm:ss 📅 To MM/DD/YYYY hh:mm:ss 📅

    ADD SEARCH CLAUSE   CANCEL

8. As you did previously in Step 4, on the left of the **'RECORD SEARCH'** window select your next search method by clicking it once, then just to the right provide the relevant data for your selected search method.

9. Click the **ADD SEARCH CLAUSE** button to add this second search method and criteria to your search:

    ADD SEARCH CLAUSE

10. In the **Build Query** section of the **'RECORD SEARCH'** window you will now have two search parts listed. If you wish to add further search parts; repeat Steps 8 and 9 until you have fully built the search you require:

    Build Query

    Title Word : test ✕   And   Date Registered : 01/01/2020 - 31/03/2020 ✕

11. You now have the option of selecting **AND** or **OR** for choosing how one search part will combine with the next search part:

    AND – Fewer records are found because records must meet the criteria defined in both search parts.

    OR – More records are found because records can meet the criteria defined in either of the search parts.

    By default, one search part will combine with the next by the **AND** clause. Clicking the **And** button between two search parts will allow you to select between **AND** and **OR**:

    Build Query

    Title Word : trim ✕   And   Title Word : content manager ✕

    Or

    And

12. If your search has multiple search parts, you may need to group certain search parts together in order for the search to run the way you intend. Should you need to do this, click on the **BUILD GROUP** button:
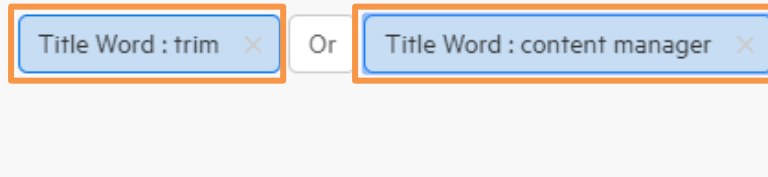
    Build Query

    Title Word : trim ✕   Or   Title Word : content manager ✕   And   Date Registered : 01/01/2020 - 31/03/2020 ✕   Or   Date Registered : 01/01/2019 - 31/03/2019 ✕

    BUILD GROUP

13. Select the two search parts which will form the beginning and end of your search group so they highlight blue, then click on the **CREATE GROUP** button. Example below:
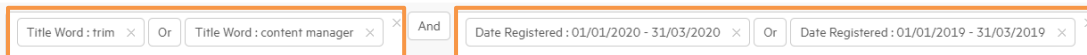

14. If necessary, repeat Steps 12 and 13 to build any additional search groups. Below is an example of a search with four search parts in which the search parts have been combined to create two search groups. So, the below search will find records with
   - (the word 'trim' OR the words 'content manager' in the title) AND
   - (which were registered in TRIM in January, February or March 2020 OR January, February or March 2019):


15. When you are ready to run your search, click on the **SEARCH** button at the bottom right of the **'RECORD SEARCH'** window:
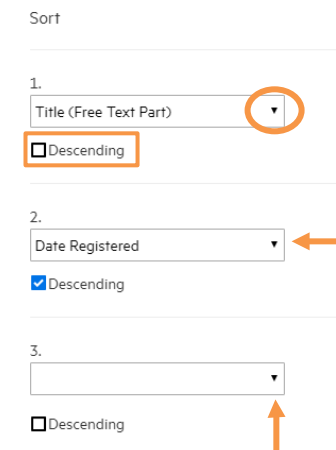

Sorting a Search

When you run a search in TRIM, by default TRIM sorts search results by 'Date Created' in descending order; that is with the most recent date at the top of the list. Should you wish to sort your search results in another way:

1. Click on the **OPTIONS** drop-down button in the **Search Area**, then select **Sort**:
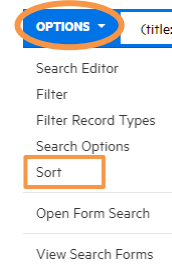
2. The **'SEARCH SORT'** window will open. Click on the first **drop-down arrow** and select the field by which you want to sort the search results. Next, decide if you want to sort your search results in ascending or descending order, and tick or un-tick the 'Descending' box as necessary:

Descending – The highest numerical value, most recent date or last alphabetical value (last letter in the alphabet) will be at the top of the search results.

Ascending – The lowest numerical value, oldest date or first alphabetical value (first letter in the alphabet) will be at the top of the search results.

3. If you wish to sort your search results further, repeat for the second and third **drop-down fields** as necessary, then click **OK** at the bottom right of the **'SEARCH SORT'** window to apply the sort settings:

Saved Searches

If you ever build quite a complex search which you anticipate needing to run again in the future, you can save the search so it is quick and easy to run next time you need it:

1. Click on the **SAVE** button at the right of the **Quick Search Area**:
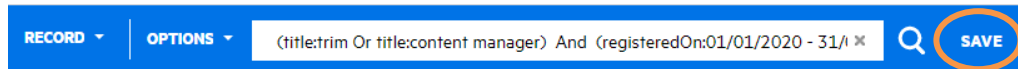
2. The **'NEW SAVED SEARCH'** window will appear:

   - Type in a name for your saved search in the 'Enter search name:' field,

   - If colleagues will need to access this search, change the 'Search owner' field to the TRIM Location for your team, School, Unit etc. Otherwise you can leave this field populated with your name.

   - Select the 'Add to Favorites' checkbox so that this saved search is added to your Favorite saved searches and hence easy for you to locate it in future.

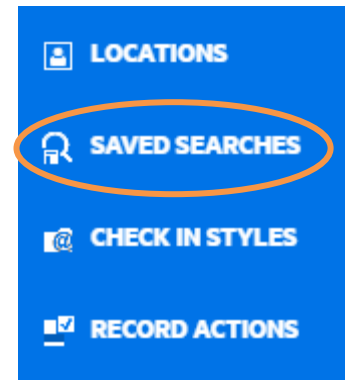   - Select the **SAVE** button when you are ready to save your search:
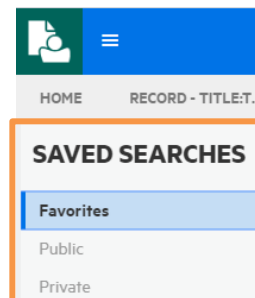

To view and run saved searches:

1. Click on the **Menu** button at the top left of the TRIM9 Web Client screen:

2. Four columns of options will display. In the third column, click on **SAVED SEARCHES**:

3. Your Favourite saved searches will appear on screen. On the left of the screen in the **SAVED SEARCHES** area you will see three options:

   Favorites – Saved searches which you have added to your Favorites.

   Public – All saved searches in TRIM which you have access to.

   Private – Saved searches for which you are the owner. Only you can see these in TRIM.

4. To execute a saved search, click on it once, then select **SEARCH**: