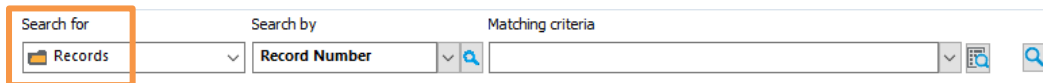


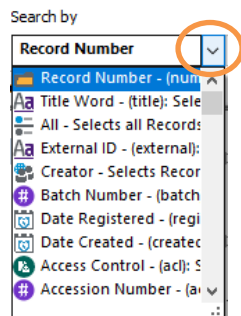
Basic Searching

1. Ensure the 'Search for' field is populated with **Records**:



Search for: **Records** | Search by: **Record Number** | Matching criteria: [empty]

2. Use the drop-down arrow for the 'Search by' field to locate and select the search method you want to search by:



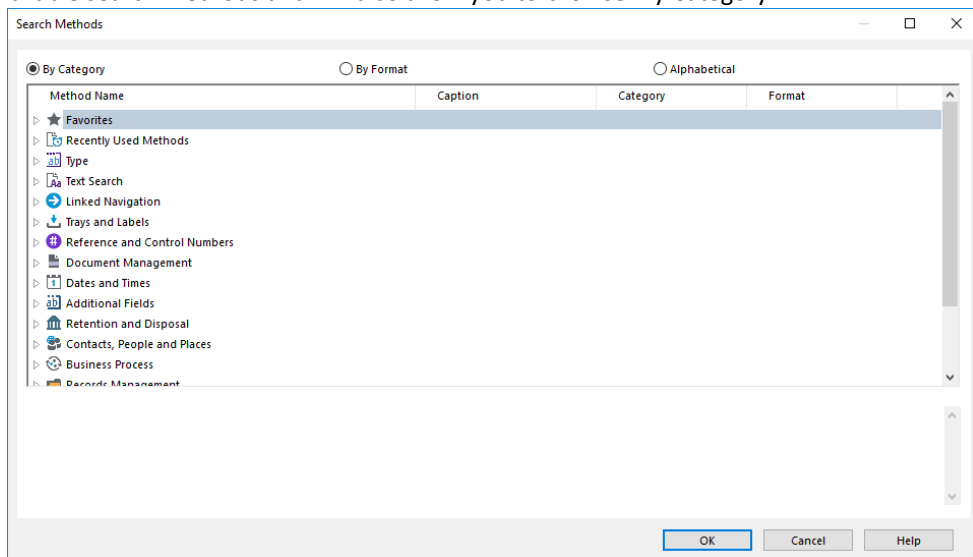
Search by: **Record Number** (selected)

- Record Number - (num)
- Title Word - (title): Sele
- All - Selects all Records
- External ID - (external):
- Creator - Selects Recor
- Batch Number - (batch
- Date Registered - (regi
- Date Created - (creat
- Access Control - (acl): S
- Accession Number - (a

Search by

Record Number

Should you not be able to locate your required search method, use the magnifying glass to the right of the 'Search by' field to display the 'Search Methods' window which display all available search methods and will also allow you to browse 'By Category':



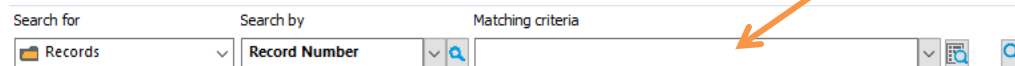
Search Methods

By Category (selected) | By Format | Alphabetical

Method Name	Caption	Category	Format
★ Favorites			
Recently Used Methods			
Type			
Text Search			
Linked Navigation			
Trays and Labels			
Reference and Control Numbers			
Document Management			
Dates and Times			
Additional Fields			
Retention and Disposal			
Contacts, People and Places			
Business Process			
Records Management			

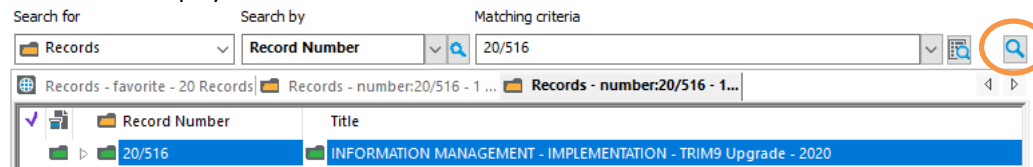
OK Cancel Help

3. In the 'Matching criteria' field is where you type what you are looking for. E.g. if you have selected 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:



Search for: **Records** | Search by: **Record Number** | Matching criteria: [empty]

4. 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:



Search for: **Records** | Search by: **Record Number** | Matching criteria: **20/516**

Records - favorite - 20 Records | Records - number:20/516 - 1 ... | Records - number:20/516 - 1...

Record Number	Title
20/516	INFORMATION MANAGEMENT - IMPLEMENTATION - TRIM9 Upgrade - 2020

Note: Text searches in TRIM9 are not case sensitive.

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:

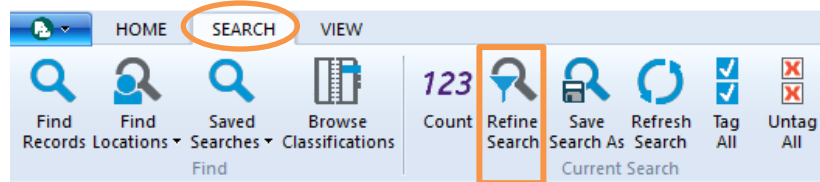
WILDCARD SYMBOL	FUNCTION	EXAMPLE	
		SEARCH CRITERIA	RESULT
?	To denote a single character	wa?t	Would return results for wait, want, wart, waft, etc.
		ch??f	Would return results for the correctly spelt chief and the incorrectly spelt cheif.
*	To denote any string of characters	wa*t	Would return a much 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

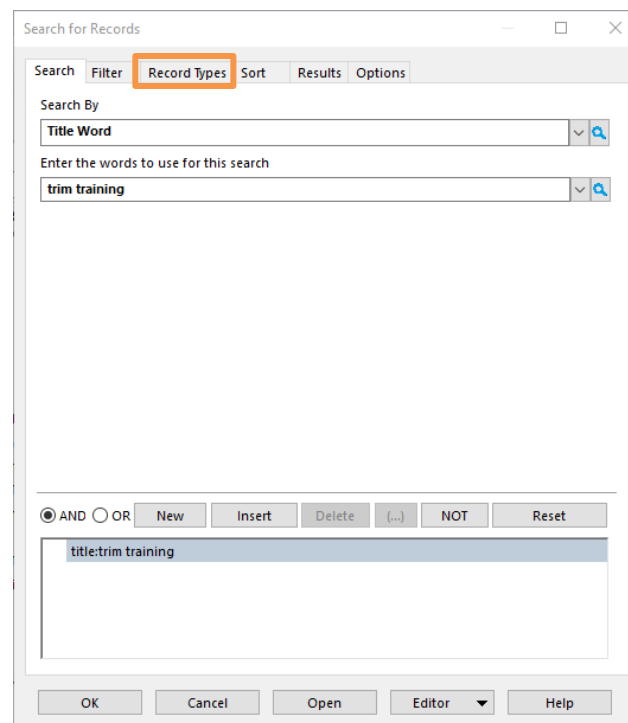
If your search returns too many results, you can refine your search to make it easier to find the particular record you are looking for.

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, an Electronic Folder, an Executed Agreement / Contract or an email. To do this:

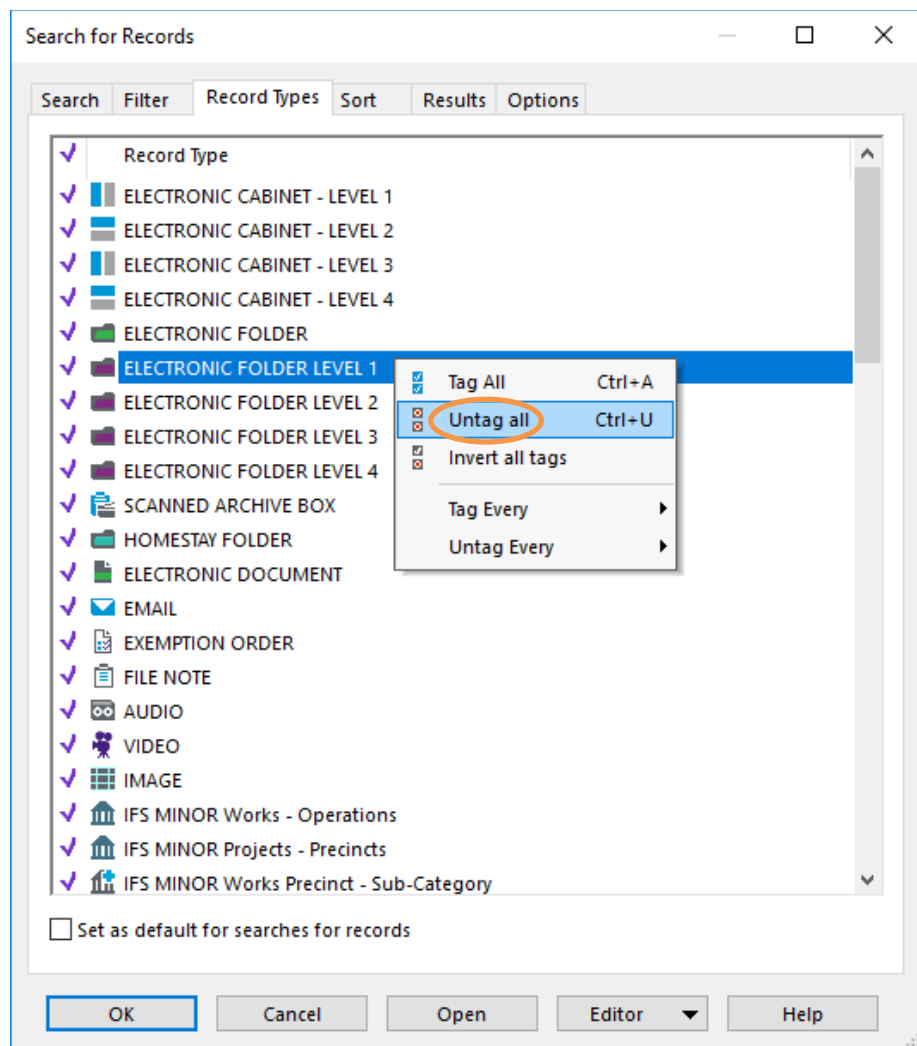
1. Press **F7** on the keyboard, or alternatively select the **'SEARCH'** tab and then click the **Refine Search** button:



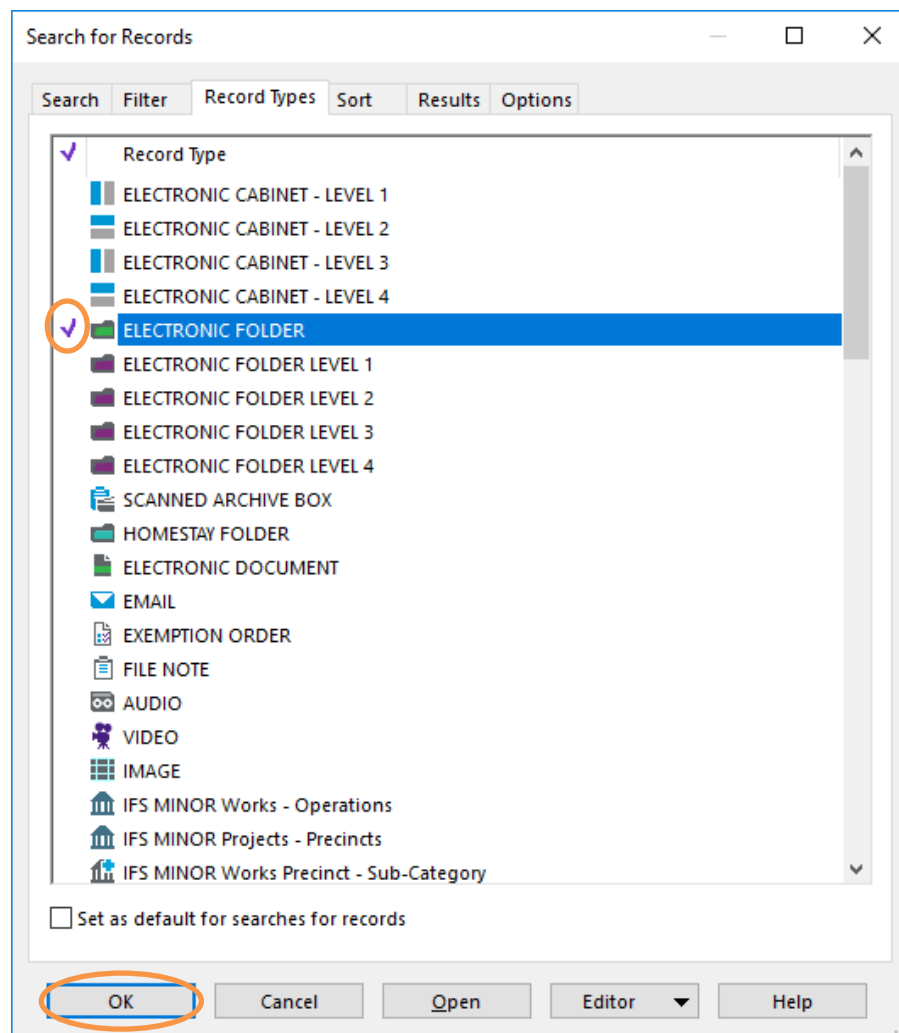
2. The **'Search for Records'** window will display. Click on the **'Record Types'** tab:



- Right-click on any of the listed record types and select **Untag all**:



- Place a tick next to any record type that you want to search for by clicking to the left of it, then click **OK**:



5. The search results will now only contain records matching your selected record type(s):

Search for	Search by	Matching criteria
Records	Title Word	trim training
Records - favorite - 20 Records Records - number:20/516 - 1 ... Records - title:trim - 10000+ ... Records - title:trim training - ...		
Record Number	Title	
17/1441	TEACHING - COURSE DELIVERY - Resources & Working Papers - TRIM Training - Courses Listed - 2017	
18/596	TEACHING - COURSE DELIVERY - Resources & Working Papers - TRIM and Records Training - Courses Listed - 2018-2022	
18/1170	PERSONNEL - STAFF DEVELOPMENT - Training - One on One / Adhoc TRIM Training - 2018	
18/1876	PERSONNEL - STAFF DEVELOPMENT - Training - TRIM Training - Attendance Records - 2019	
10/2257	PERSONNEL - STAFF DEVELOPMENT - Training - TRIM Training - Course Evaluation Forms	
19/455	PERSONNEL - STAFF DEVELOPMENT - Training - One on One / Adhoc TRIM Training - 2019	
15/2653	INFORMATION MANAGEMENT - POLICY, PROCEDURES AND GUIDES - TRIM Training Material and Correspondence	

Sorting Search Results by Columns

To easily sort search results, select the column header to sort by a particular column.

- Record Number:** Clicking once sorts from lowest number to highest, click the column header again to sort from highest number to lowest.
- Title:** Clicking once sorts the records in alphabetical A→Z order, click again to sort in reverse alphabetical Z→A order.
- Creator:** Clicking once sorts alphabetically by Surname, click the column header again to sort in reverse alphabetical order.
- Date Registered:** Click once to sort oldest to newest, click the column header again to reverse the order and sort newest to oldest.

Record Number	Title	Creator	Date Registered
17/1441	TEACHING - COURSE DELIVERY - Resources & Working Papers - TRIM Training - Co...	Colanzi, Lou	10/02/2017 at 12:23 PM
18/1876	PERSONNEL - STAFF DEVELOPMENT - Training - TRIM Training - Attendance Records...	Rheinberger, Bryce	6/06/2018 at 9:41 AM
18/281	PERSONNEL - STAFF DEVELOPMENT - Training - HDR TRIM Workflow Reference Gui...	Rheinberger, Bryce	25/01/2018 at 12:33 PM
16/814	PERSONNEL - STAFF DEVELOPMENT - Training - TRIM Training - Attendance Records...	Wren, Adam	15/01/2016 at 10:13 AM
11/4488	PERSONNEL - STAFF DEVELOPMENT - Training - Kapish TRIM Administrator Training	McElhinney, Jeanette	29/11/2011 at 2:03 PM
15/2652	PERSONNEL - STAFF DEVELOPMENT - Training - TRIM Training Course Information	Friend, Tanya (Ms)	9/10/2015 at 9:44 AM
16/815	PERSONNEL - STAFF DEVELOPMENT - Training - TRIM Training - Course Evaluation F...	Wren, Adam	15/01/2016 at 10:20 AM
18/1170	PERSONNEL - STAFF DEVELOPMENT - Training - One on One / Adhoc TRIM Training ...	Rheinberger, Bryce	24/04/2018 at 3:40 PM
15/2653	INFORMATION MANAGEMENT - POLICY, PROCEDURES AND GUIDES - TRIM Training ...	Friend, Tanya (Ms)	9/10/2015 at 10:30 AM

Searching Tips and Pointers

- The **Explorer Window** and Shortcuts such as **Recent Documents**, **Recent Files** and **Favorites** are a very user friendly way to quickly locate records which you have worked on recently, created recently or use regularly.

For more information on the Explorer Window and Shortcuts please refer to the [TRIM9 Quick Reference Guide - D18/353391 - Introduction to TRIM9, the Explorer Window and Shortcuts](#)

- TRIM9 supports **Dynamic Search Terms** for some search methods:
 - When searching via a **Location field** such as 'Creator', typing 'me' will use the logged on user as the search criteria for that field:

Search for	Search by	Matching criteria
Records	Creator	me

- When searching via a **Date field** such as 'Date Registered', the following are valid terms which you can type as the search criteria;
 - today,
 - yesterday,
 - tomorrow,
 - this week,
 - previous week,
 - this month,
 - previous month,
 - this year,
 - previous year.

Search for	Search by	Matching criteria
Records	Date Registered	today