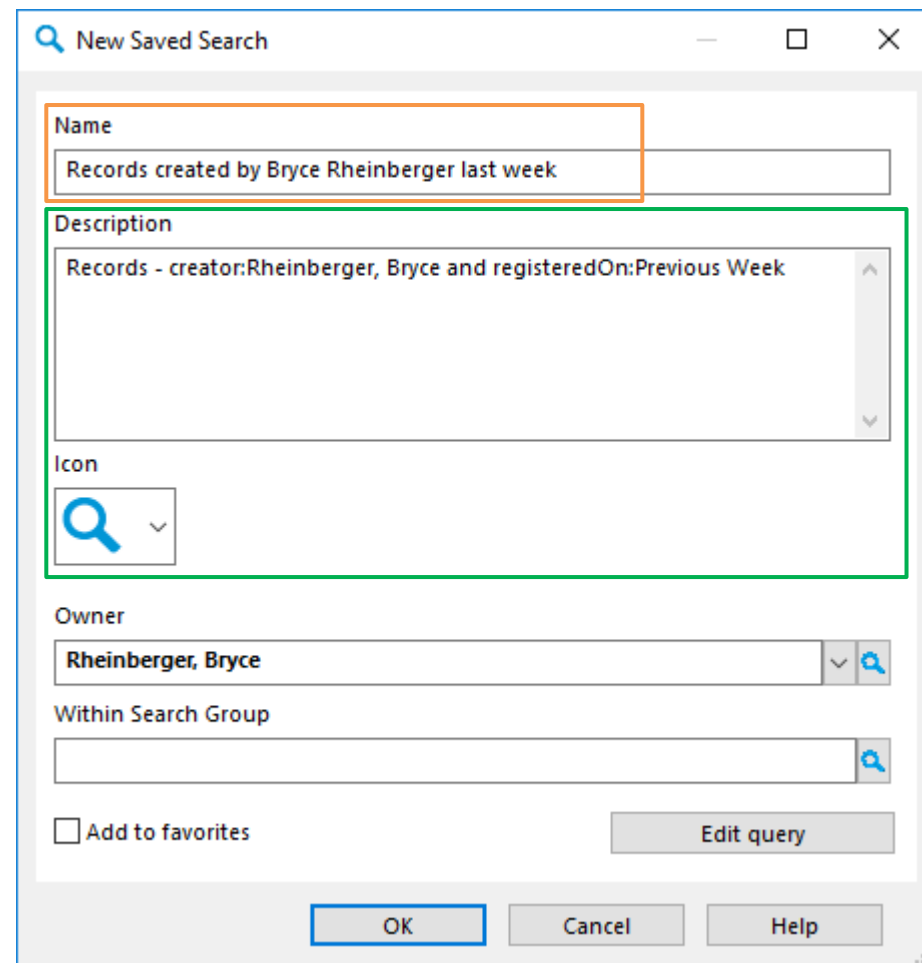## Saving a Search

If you regularly conduct the same search you can save the search criteria as a Saved Search for re-use in the future. Searches that you save can be added to your Favourites (in the **Shortcuts Pane)** for quick and easy access.

To create a new Saved Search follow these steps:

1. Perform the search you want to save.

2. With your search results displayed as the active window, right-click on one of your search results and select **Search → Save Search As**:
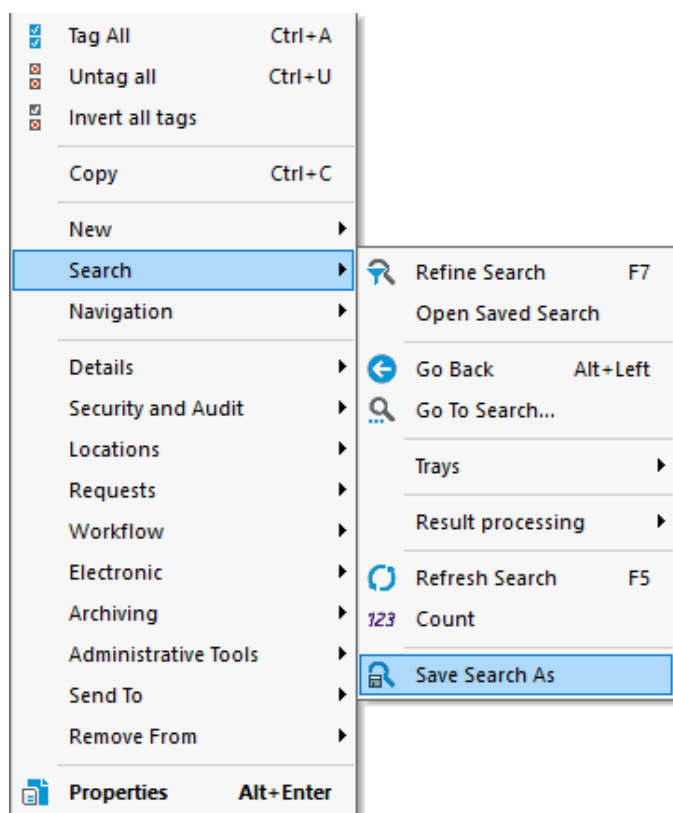
3. The '**New Saved Search'** window will appear. In the 'Name' field, enter a meaningful name for the saved search.
   Hint: The 'Description' and 'Icon' fields can be left as is, however if you'd like to enter a custom description and/or choose a custom icon you can.
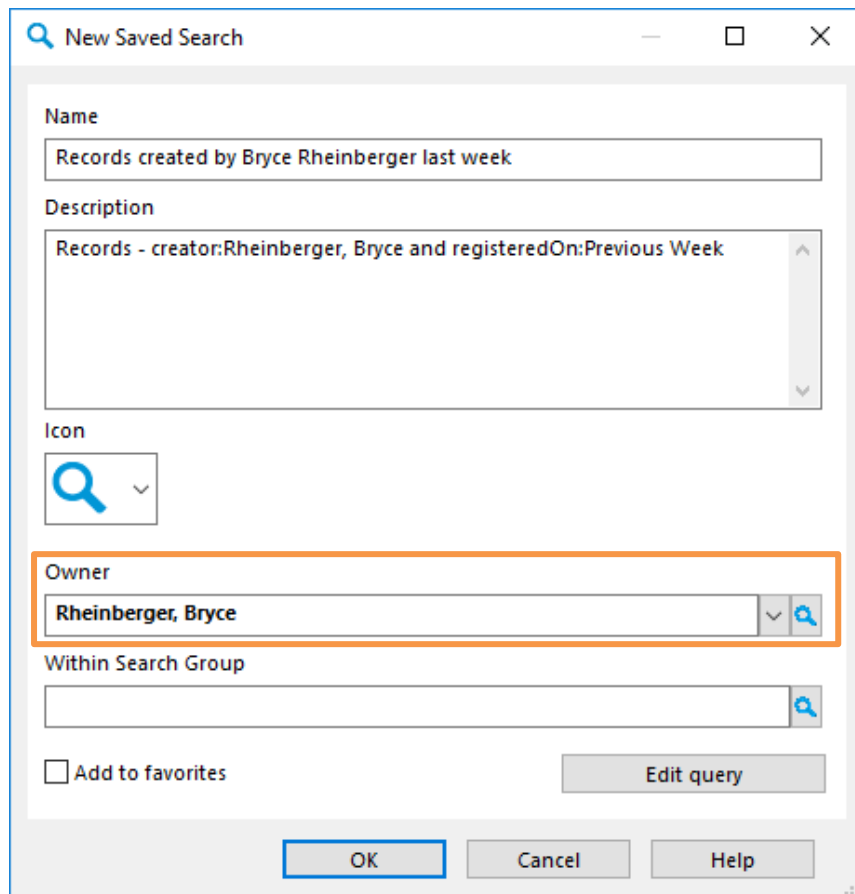
4. Complete the 'Owner' field as appropriate. Below is information on your options for completing this field.

If you leave the 'Owner' field as your name, the new Saved Search will be private so that only you can access it. If you decide to delete your name from the 'Owner' field then the new saved search will be public, meaning everyone will have access to it.

The easiest way to locate your Business Unit, School, Faculty etc. is to first click on the **My memberships** button:
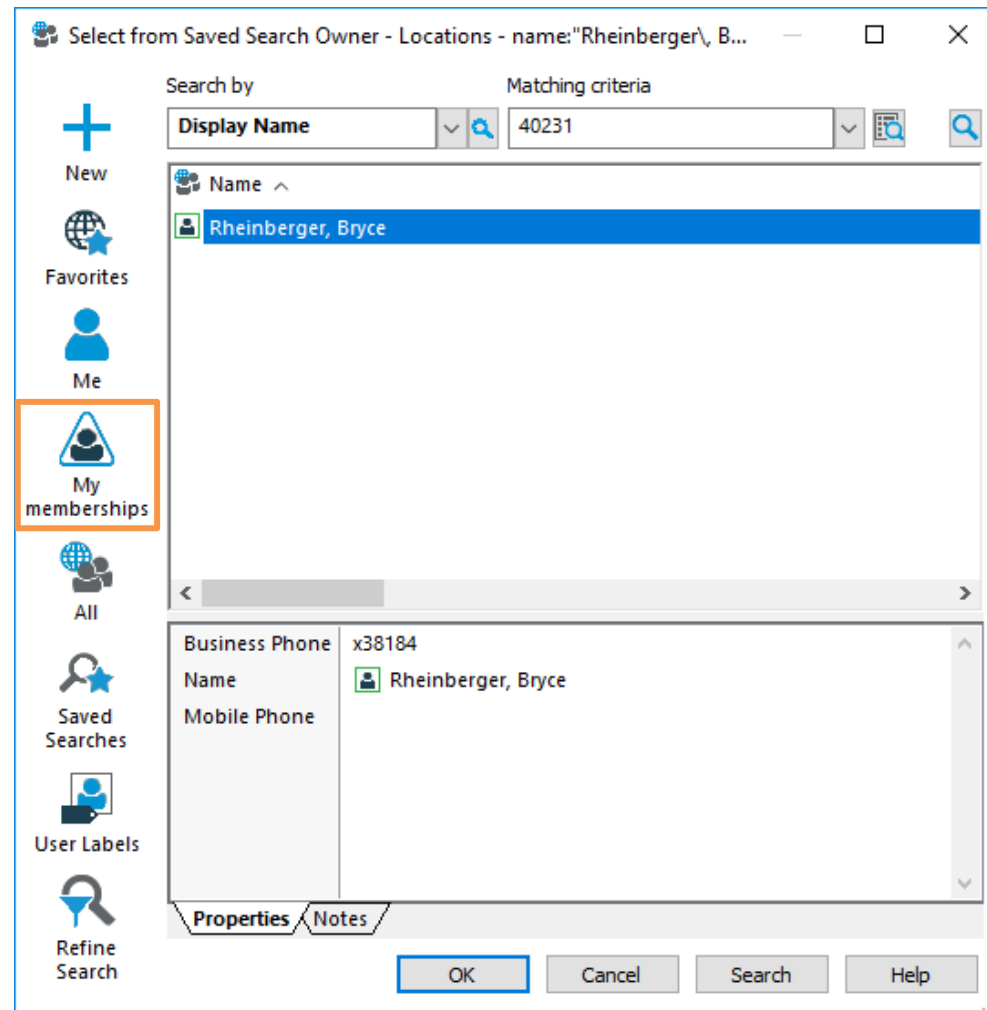
However, if you would like to provide access to a particular group (e.g. your School or Business Unit) you can click the **magnifying glass** button at the end of the 'Owner' field, which will open up the **'Select from Saved Search Owner'** window (refer image above right):

This will display any location that you're a direct member of in TRIM9. If you need to navigate up the TRIM9 Locations Hierarchy (e.g. if a Position is displayed but you want to select a Business Unit, or if a Business Unit is displayed but you want to select a Division) then click on the appropriate location to highlight it blue, then press **Ctrl+J** on the keyboard:
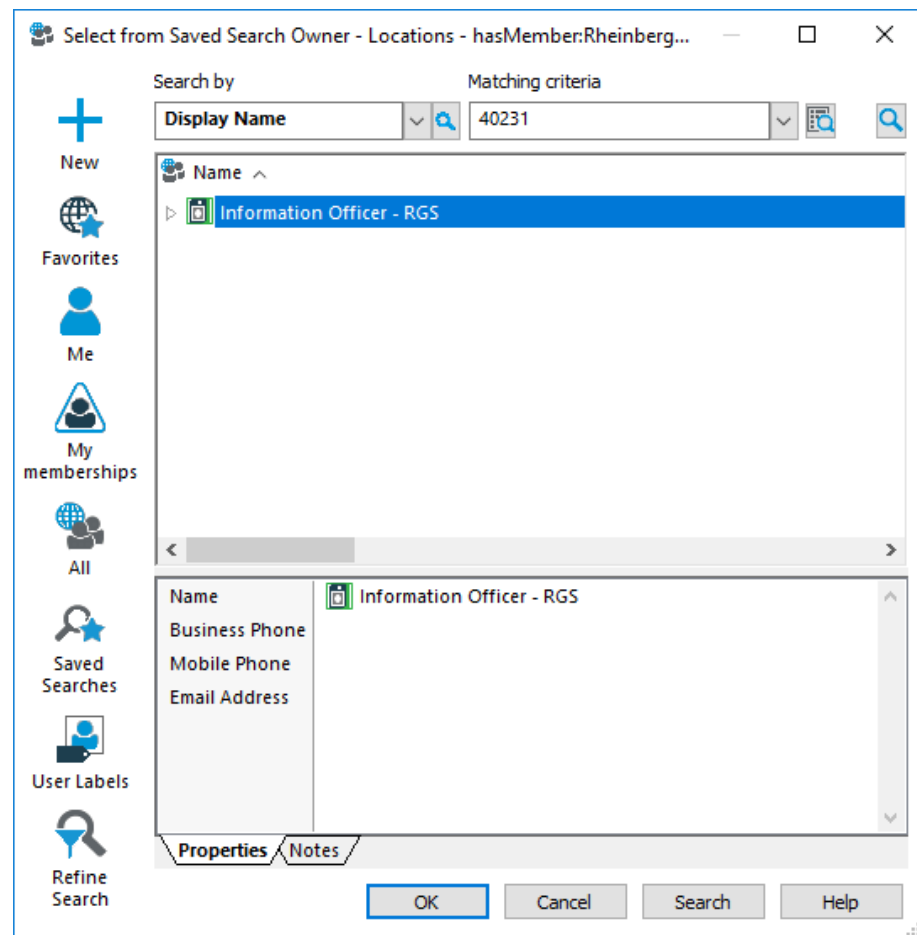
Continue to use **Ctrl+J** to navigate up the TRIM9 Locations structure until you have located the group you want to select. Once you have located it, click on it once to highlight it blue, then click **OK**:

Hint: If you navigate too far up the structure, just click on the **My memberships** button to start again:
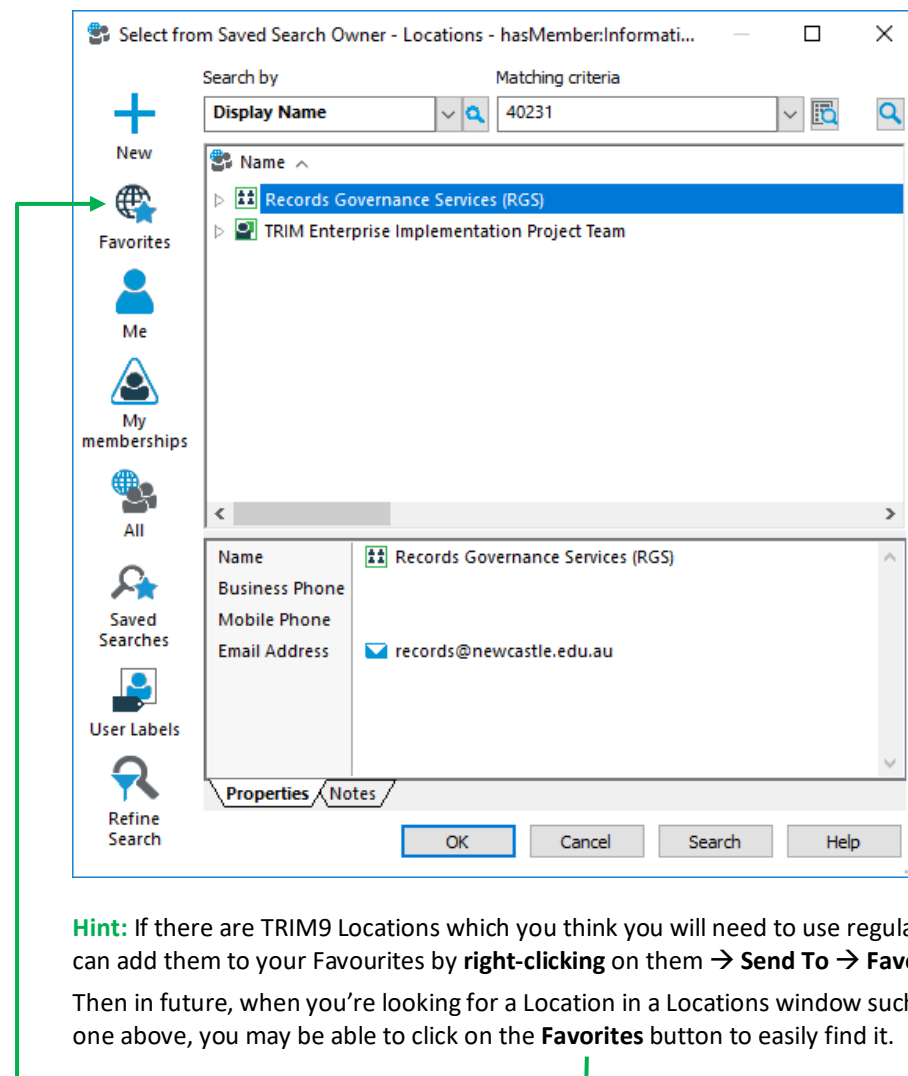

Hint: If there are TRIM9 Locations which you think you will need to use regularly; you can add them to your Favourites by **right-clicking** on them → **Send To** → **Favorites**.

Then in future, when you're looking for a Location in a Locations window such as the one above, you may be able to click on the **Favorites** button to easily find it.

Note: If you need to locate and select a location which isn't within your Facutly/Division, click on the **All** button:
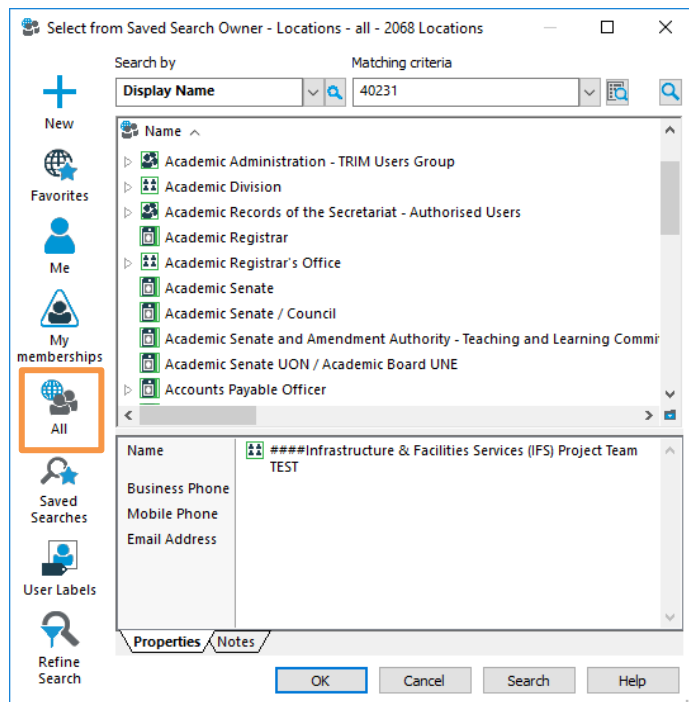

Then **before you click anywhere else**, begin typing the search criteria for the location you're looking for, and the below 'Prefix Search' window will pop up:
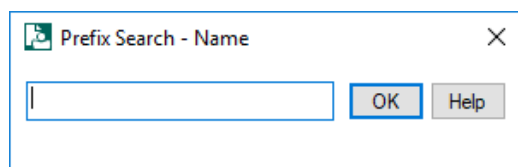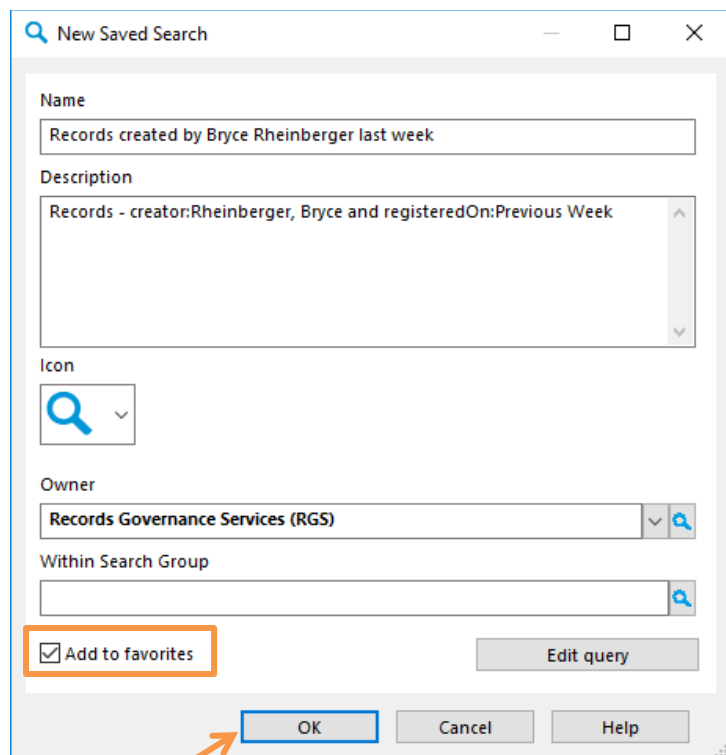

Hint: If you are looking for a Business Unit, School, Faculty etc. it is often easier to type the surname of a staff member who you know belongs to that Business Unit, School, Faculty etc. then use the **Ctrl+J** navigation method referred to earlier in this Quick Reference Guide to navigate up the TRIM9 Locations structure until you have located the group you want to select.

5. The 'Within Search Group' field is not mandatory. Search Groups help you to organise your saved searches into groups or a hierarchical structure; but they are not saved searches themselves.

Should you wish to place your Saved Search in a Saved Search Group, it is important to note that a Saved Search can only be added to a Saved Search Group when the Saved Search and Saved Search Group have the same Location as the Owner.
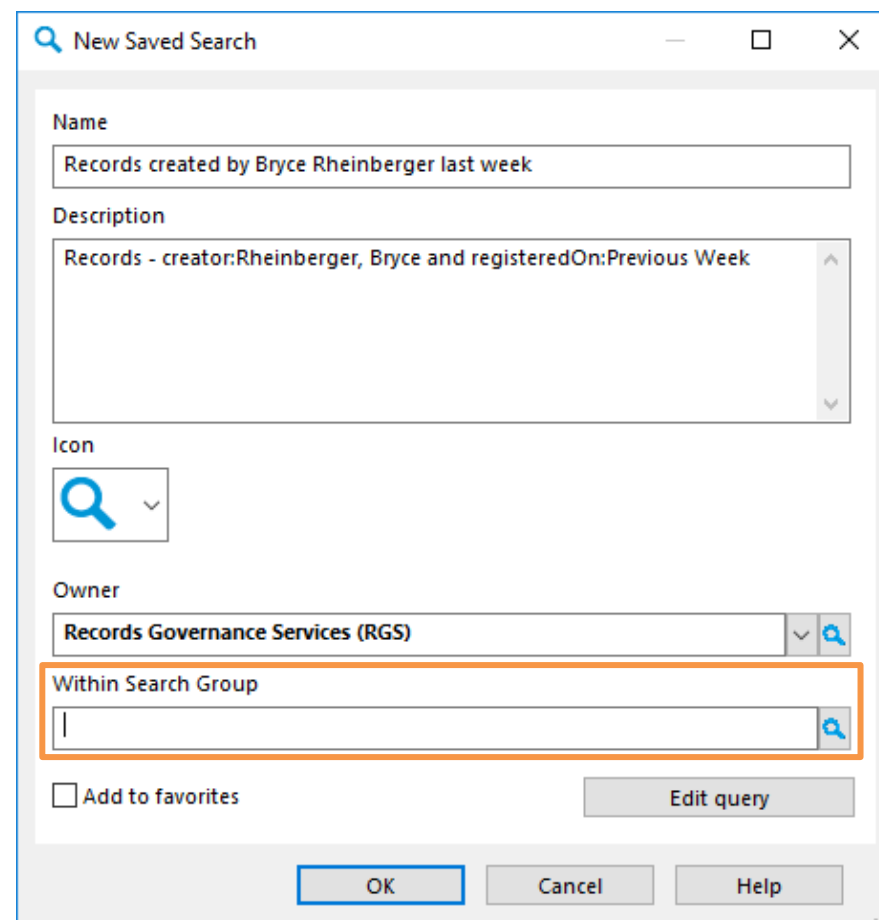
6. If you would like to send your new Saved Search to your Favourites where you can easily access it later, tick the 'Add to favorites' checkbox by clicking it once:
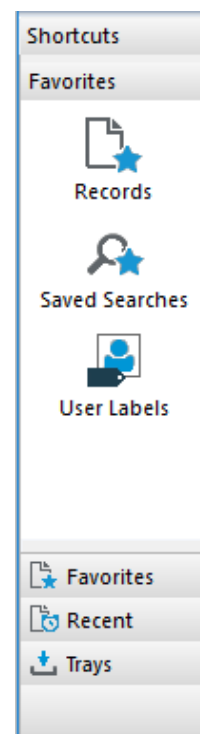

7. Click **OK** to save the Saved Search.

Locating Saved Searches

Your previously created **Saved Searches** are available at any time for you to use. In addition, Public Saved Searches that have been created by other TRIM users or the Records Governance Services team, and saved searches made available to you when created by other users, will also be available for you to use.

Saved Search - Located in Favorites

If you ticked the **Add to Favorites** check-box when creating your Saved Search, you can access the Saved Search via your **Favorites** tab in the **Shortcuts Pane** on the left of your TRIM screen. To access a Saved Search via your Favourites, follow the below steps:


1. In the Shortcuts Pane, ensure the **Favorites** tab is the currently selected tab.

2. Click the **Saved Searches** shortcut button.

Note: If the '**Favorites'** tab is not already displaying as the currently selected tab, select it by clicking on '**Favorites'** at the bottom of the **Shortcuts Pane**.
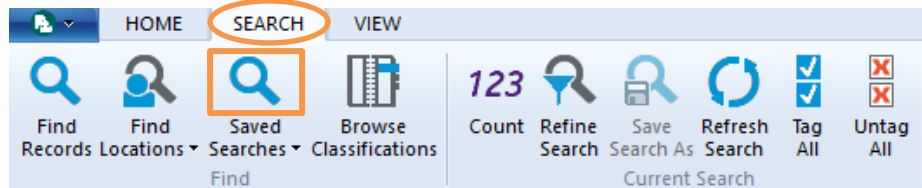
3. A 'Saved Searches - favorite' window will appear with your Favorite Saved Searches listed. Double-click on a Saved Search to run the search. Your search results will then display in a new window:
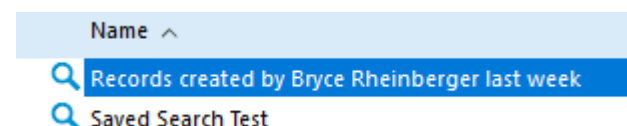
Saved Search - Not Located in Favorites

If you need to access a Saved Search that is not located in your Favourites, follow the below steps.

1. Select the **'SEARCH'** tab, then click on the **Saved Searches** magnifying glass:


2. A window will appear with all the saved searches that you have permission to access. Some searches may have been created by other users and some may have been created by you.

3. **Scroll** through the list of saved searches to locate the Saved Search that you want to run:
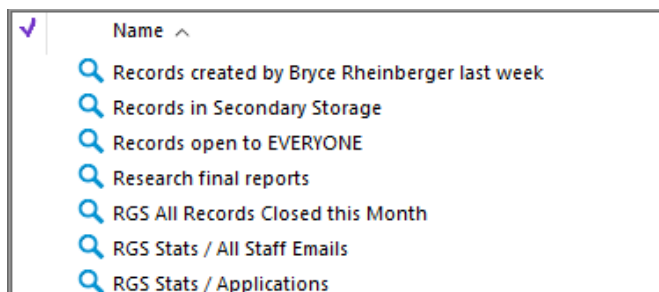
Hint: If you know the name of the Saved Search; <u>**before you click anywhere else**</u> you can type the first few letters (which will open the below window) then press **Enter** on your keyboard and it will either take you directly to the Saved Search that you are looking for or display a smaller list of saved searches for you to scroll through:
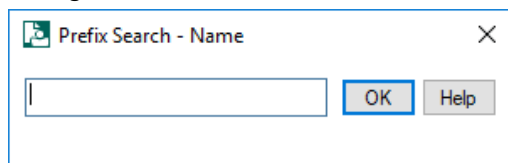
4. Once you have located the Saved Search you want to run, double-click on it to run it:
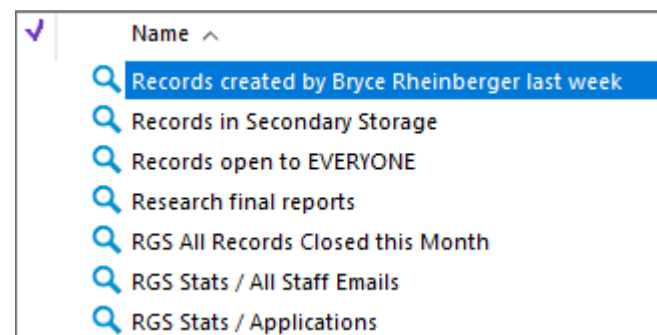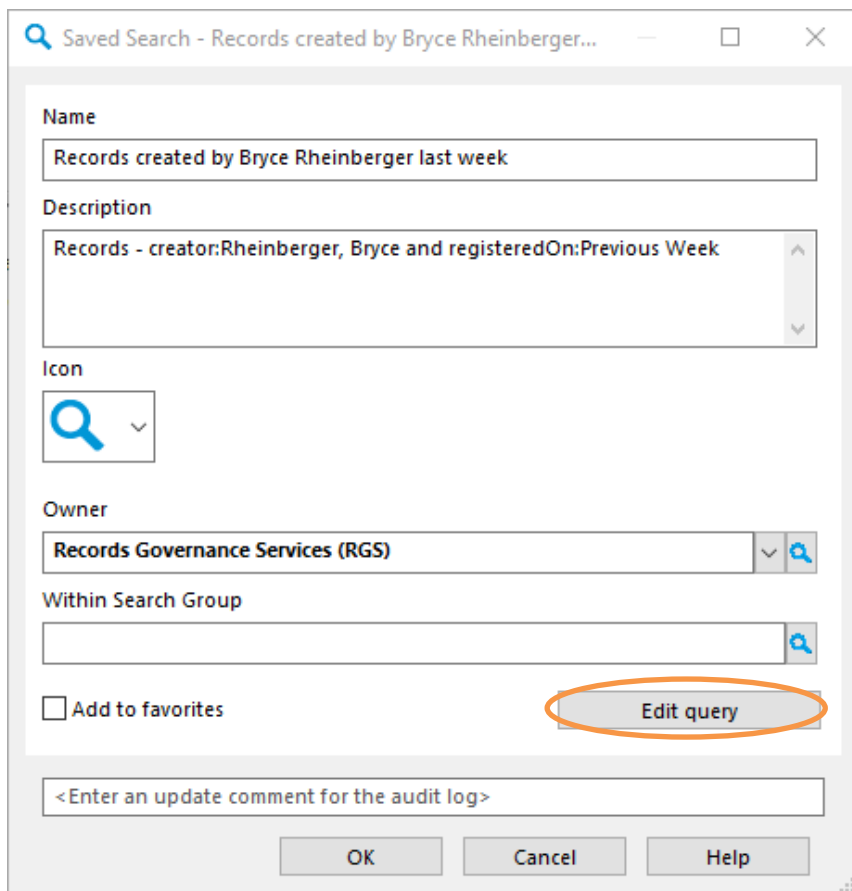

Hint: If this is a search that you expect to use often, add it to your Favourites by right-clicking on it → **Send To** → **Favorites**.

Editing a Saved Search

Should the criteria of one of your saved searches require amending/updating, this can be done by following the below steps:

1. Locate the Saved Search you need to update, then right-click on it → **Properties**:

2. When the below **'Saved Search'** window appears, select the **Edit query** button:
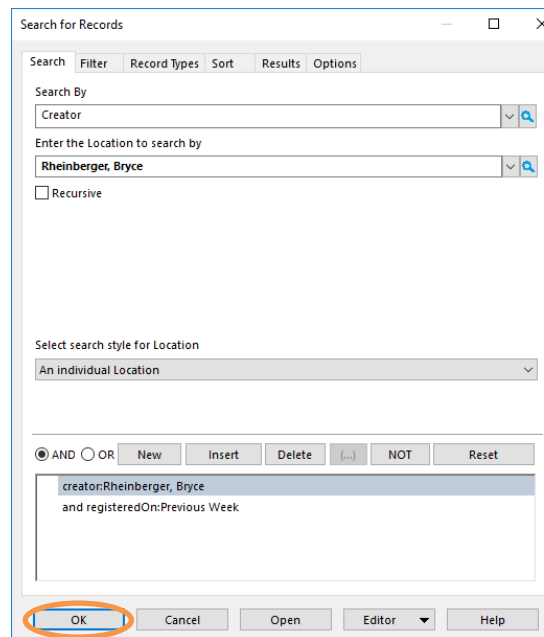
3. Update the search as required, then select **OK**:
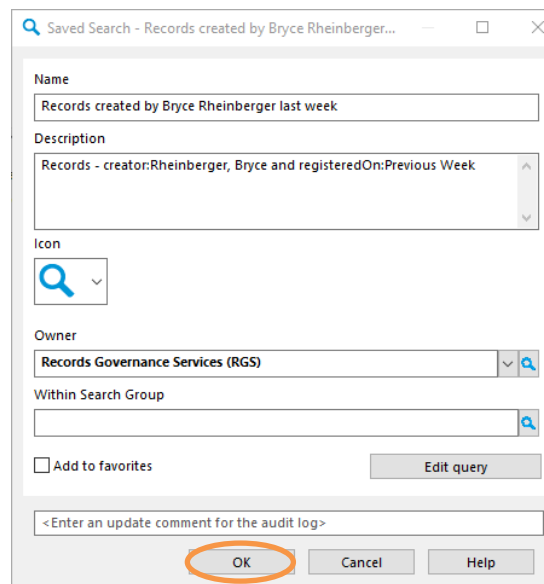
4. Select **OK** to save your changes and close the **'Saved Search'** window: