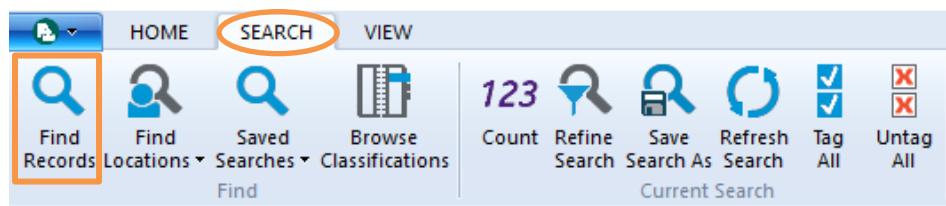


Advanced Searching

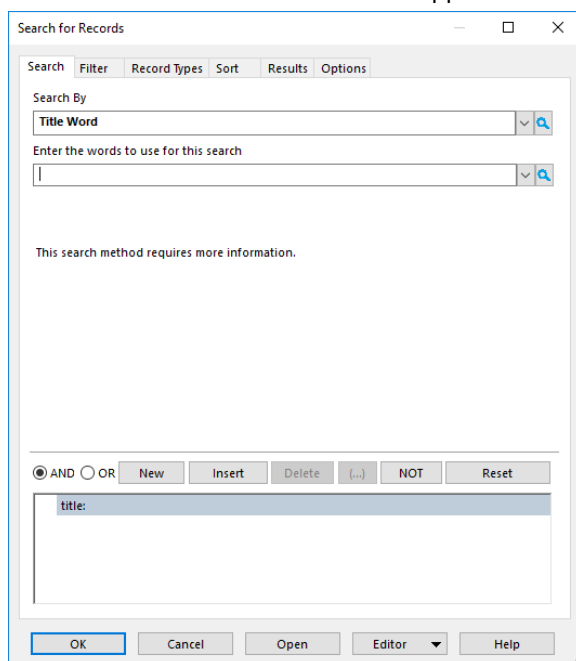
Advanced searching in TRIM9 generally involves searching for records which match two or more criteria, plus using the search options available to you to filter and sort search results, and to display certain information about your search results.

Searching by Two or More Criteria

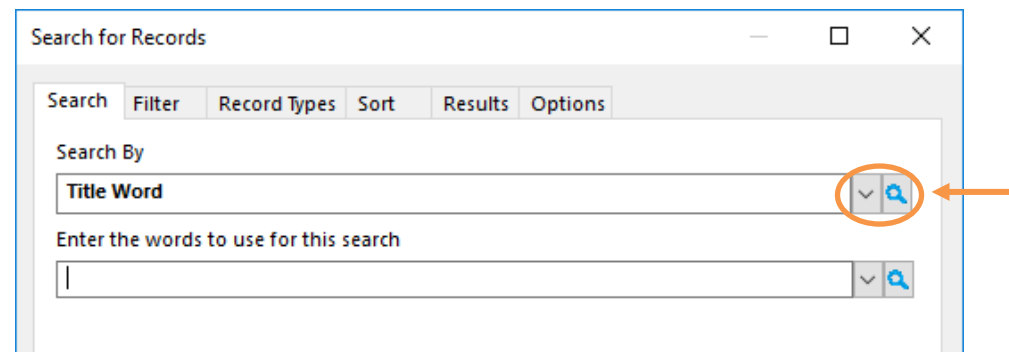
1. Select the **'SEARCH'** tab, then click on the **Find Records** button:



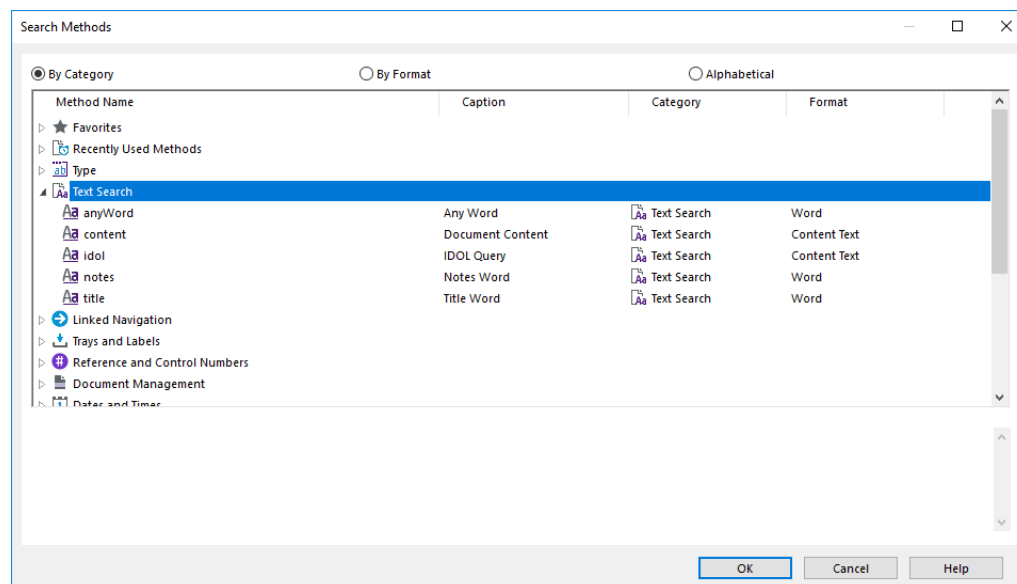
2. The **'Search for Records'** window will appear:



3. You now need to populate the 'Search By' field with the first search method for your search. By default, the 'Search By' field will be populated with whichever 'Search By' option you most recently used to run a basic search. If you need to change this, your first option is to use the **drop-down arrow** at the end of the 'Search By' field to select a different search method:



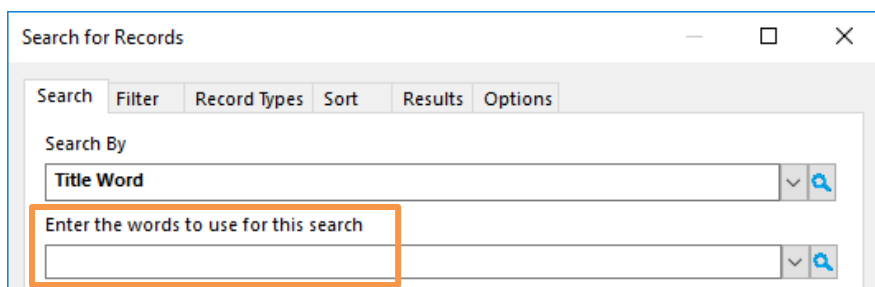
Should you not be able to locate your required search method, use the **magnifying glass** to the right of the 'Search By' field to display the **'Search Methods'** window which displays all available search methods and will also allow you to browse 'By Category'. Click the **triangle** next to a Category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



Note: If you are wanting to search by a custom field that has been put into TRIM9 for you/your team etc. (such as School, Faculty, Agreement End Date, Agreement Type) these are all located under the 'Additional Fields' category.

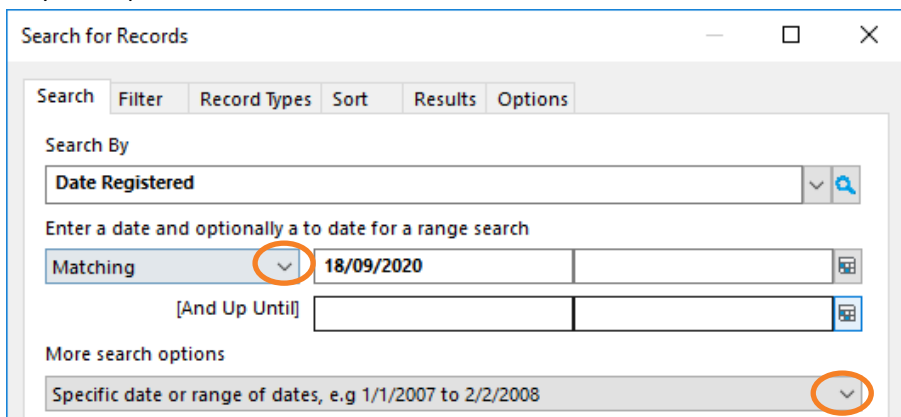
- Once you have populated the 'Search By' field with your first search method, you will then need to enter criteria for your search in the field directly below the 'Search By' field. This field will change depending on what search method is entered into the 'Search By' field. Please see examples below:

Text Searches (Title Word, Any Word, Document Content etc.)



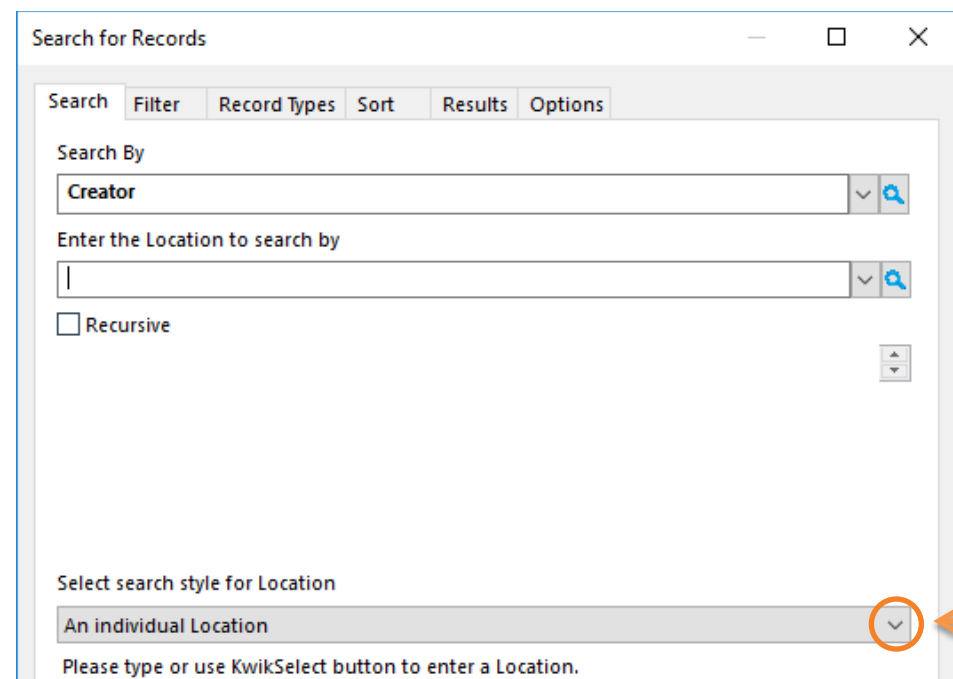
Date Searches (Date Created, Date Registered, Date Closed etc.)

When searching by a 'date' search method you have some options regarding exactly how you want to search. Use the **drop-down arrows** available to modify your search to best suit your requirements:



Location Searches (People, Positions, Schools, Business Units etc.)

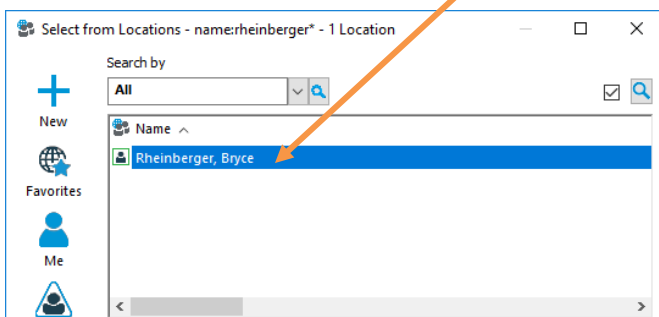
When searching by a 'location' search method you have some options regarding exactly how you want to search. Use the **drop-down arrow** available to modify your search to best suit your requirements:



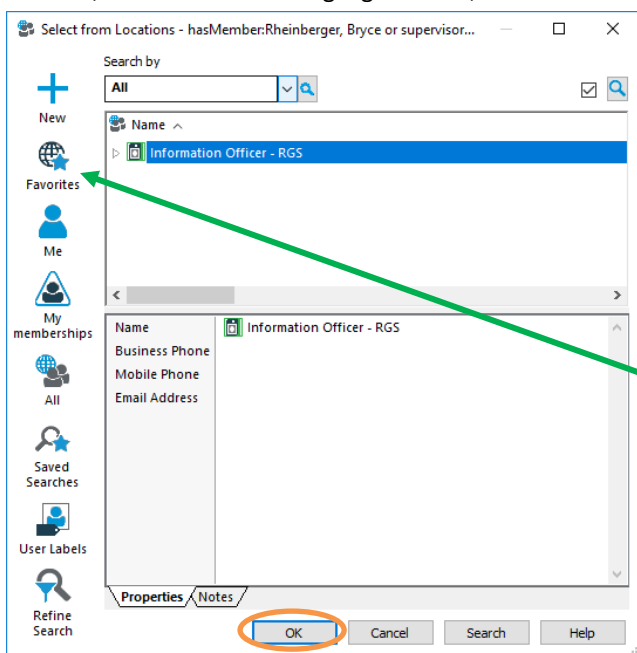
When searching for a location such as 'Creator' or 'Author', if you want to enter a person, type their surname into the 'Enter the Location to search by' field. Their full name may then automatically populate, however if it doesn't, click on the **magnifying glass** button at the end of the 'Enter the Location to search by' field, which will open the '**Select from Locations**' window for you to correctly identify and select them.

If you are looking for a 'Position' title such as 'TRIM Administrator' or 'Manager Records Governance Services', or other location such as a School or Business Unit; search for a person who is in that location (as above, type their surname into the 'Enter the Location to search by' field, then click on the **magnifying glass** button at the end of the 'Enter the Location to search by' field to open the '**Select from Locations**' window for you to locate

them). Then, to navigate up the TRIM9 Locations Hierarchy (e.g. if a Person is displayed but you want to select a Position, or 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) click on the appropriate location to highlight it blue:



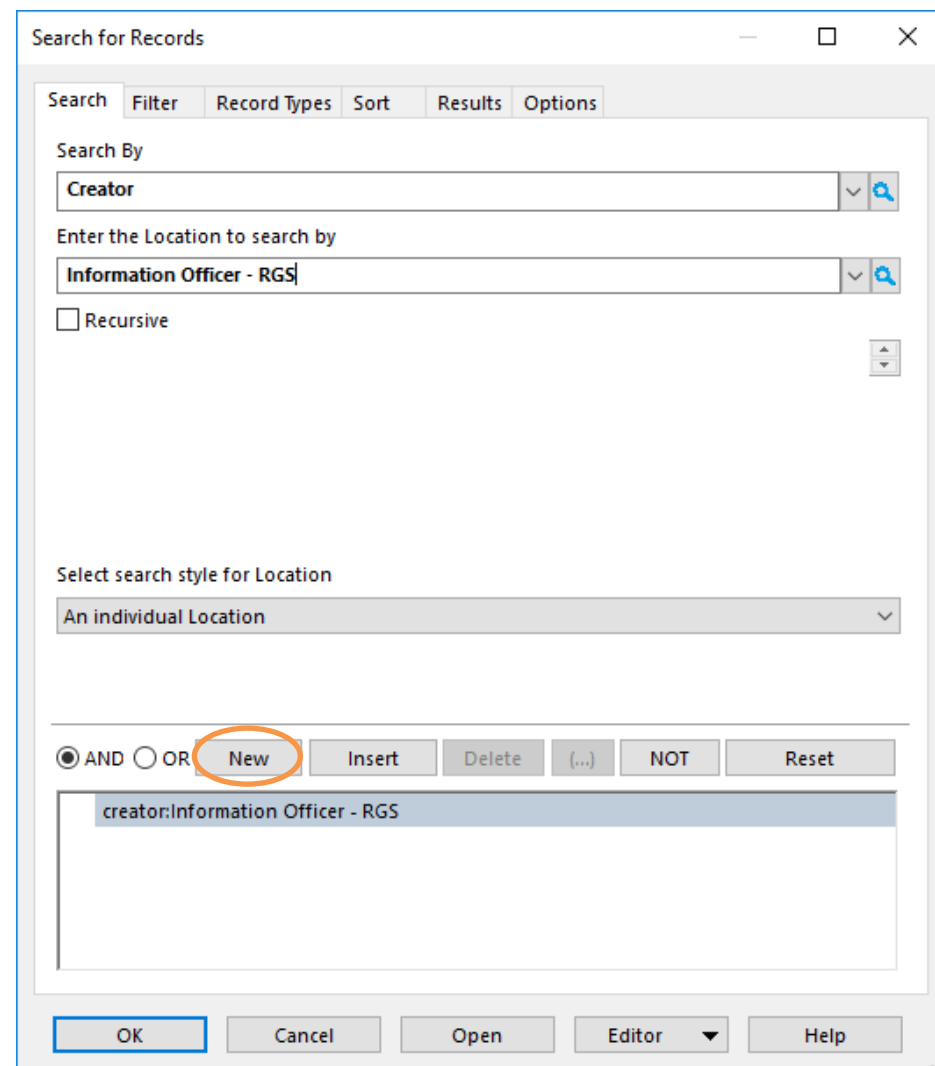
Then click **Ctrl+J** on the keyboard to navigate up the TRIM9 Locations structure. Continue to use **Ctrl+J** to navigate up the TRIM9 Locations structure until you have located the Position / Business Unit / School etc. you want to select. Once you have located it, click on it once to highlight it blue, then click **OK**:



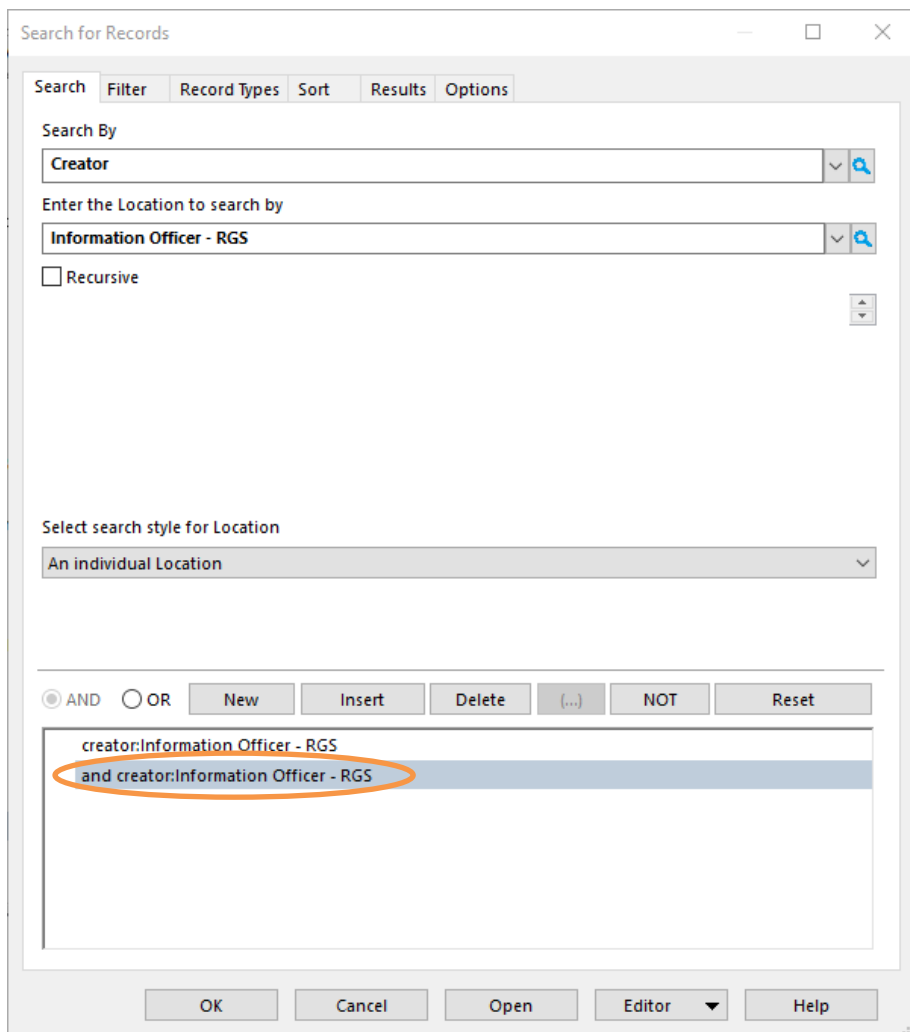
Hint: If there are TRIM9 Locations which you think you will need to use regularly; you can add them to your Favourites by right-clicking on them → **Send To** → **Favorites**

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

- When you have entered in your search criteria for your first search method, click **New** to add an additional search method:



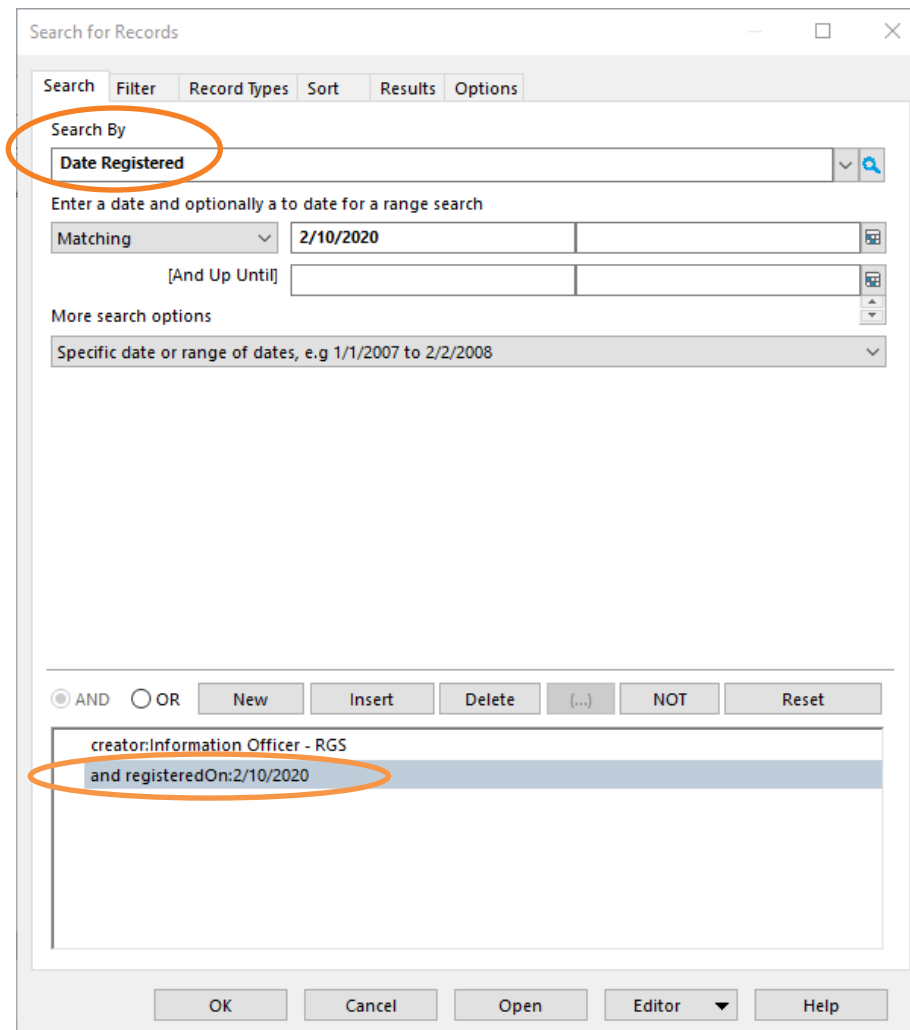
6. You will notice that there is now another line in the field at the bottom of the 'Search for Records' window. Ensure the bottom line is highlighted (either grey or blue) as in the screenshot below:



The screenshot shows the 'Search for Records' window with the following details:

- Search By:** Creator
- Enter the Location to search by:** Information Officer - RGS
- ☐ Recursive
- Select search style for Location:** An individual Location
- Search Criteria:**
 - AND OR New Insert Delete (...) NOT Reset
 - creator:Information Officer - RGS
 - and creator:Information Officer - RGS** (highlighted)
- Buttons:** OK, Cancel, Open, Editor, Help

7. Now change the 'Search By' field to your next required search method. When you do this, the bottom line in the field at the bottom of the window will update to reflect the search method you selected (refer screenshot below):



The screenshot shows the 'Search for Records' window with the following details:

- Search By:** Date Registered
- Enter a date and optionally a to date for a range search:**
 - Matching: 2/10/2020
 - [And Up Until]
- More search options:** Specific date or range of dates, e.g 1/1/2007 to 2/2/2008
- Search Criteria:**
 - AND OR New Insert Delete (...) NOT Reset
 - creator:Information Officer - RGS
 - and registeredOn:2/10/2020** (highlighted)
- Buttons:** OK, Cancel, Open, Editor, Help

8. Now enter criteria/options for your second search method in the field(s) below the 'Search By' field. When you do this, the bottom line in the field at the bottom of the window will update to reflect the criteria/options you added (refer screenshot below):

Search for Records

Search Filter Record Types Sort Results Options

Search By
Date Registered

Enter floating value type and a single type of time interval
This Week

More search options
Floating range, single time interval, e.g. this week

AND OR New Insert Delete (...) NOT Reset

creator:Information Officer - RGS
and registeredOn:This Week

OK Cancel Open Editor Help

9. You now have the option of selecting **AND** or **OR** for choosing how the second search method will combine with the first search method:

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

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

Search for Records

Search Filter Record Types Sort Results Options

Search By
Date Registered

Enter floating value type and a single type of time interval
This Week

More search options
Floating range, single time interval, e.g. this week

AND OR New Insert Delete (...) NOT Reset

creator:Information Officer - RGS
and registeredOn:This Week

OK Cancel Open Editor Help

10. One other option you have for each search method is to use the **NOT** button.

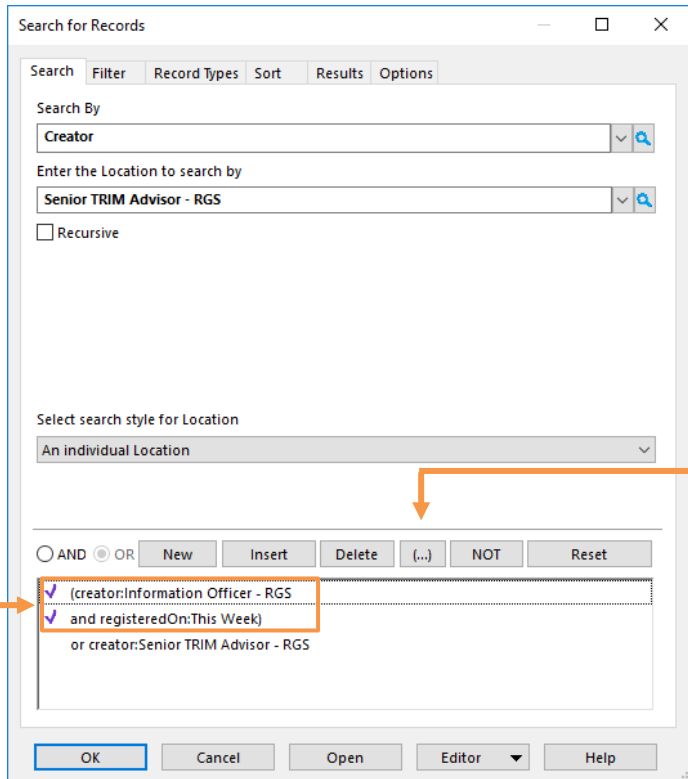
By default TRIM will find search results that match the criteria you have selected. The **NOT** button will instead return results that **do not** match the criteria selected for that particular search method.

11. If you would like to add additional search methods and criteria to your search, you can do so by performing [Steps 5 to 10](#) above for every additional search method you add.

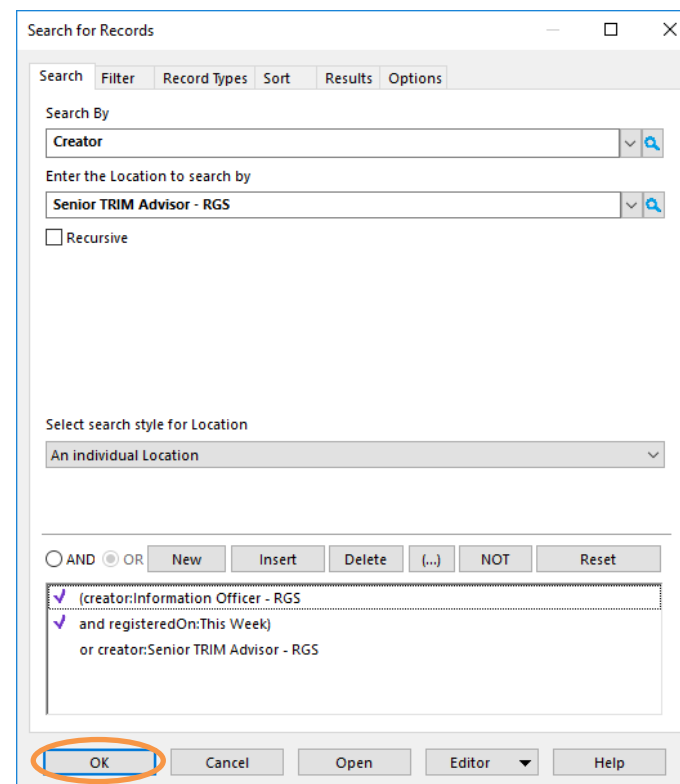
12. If you add three or more criteria to your search, you may find you need to use the (...) button to get the search to run as you intend. If you choose to, the (...) button will add brackets around your chosen search methods and criteria in order to form one or more groups within your search clause. Similar to in mathematics, brackets give a clause precedence, in that search methods and criteria contained within a set of brackets will be performed together.

To form a search group within your search clause:

- Click to the left of the search method and criteria for which you want the brackets to start and stop, which will place a tick next to them
- Click on the (...) button which will add brackets around the chosen search methods and criteria:

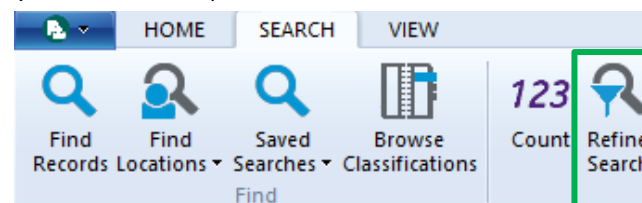


13. When you are ready to run the search, just click on the **OK** button to do so:

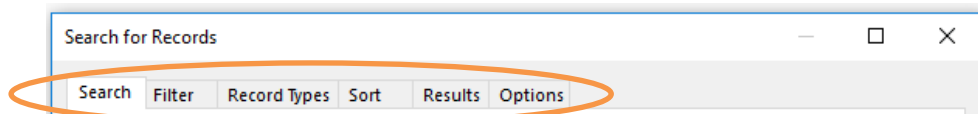


Hint: When you have run the search and the search results are displayed on screen, if you want to make any changes to your search, pressing **F7** on the keyboard will take you back into the 'Search for Records' window where you can modify the search as required.

Alternatively, you can use the **Refine Search** button on the 'Search' tab to modify your search as required:



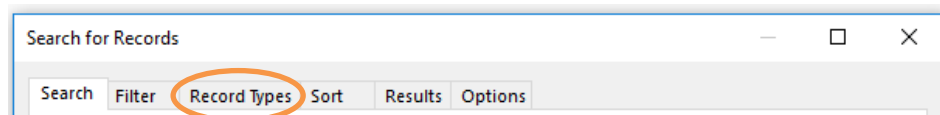
14. In addition to the 'Search' tab in the 'Search for Records' window, there are five other tabs which allow you to filter your search even further and choose how the results will display. As you are learning to perform advanced searches, you may want to explore these tabs to discover exactly what options are available to you and to familiarise yourself with these options. The 'Record Types', 'Sort' and 'Results' tabs are explained below, as these three tabs in particular are very useful search customisation tools:



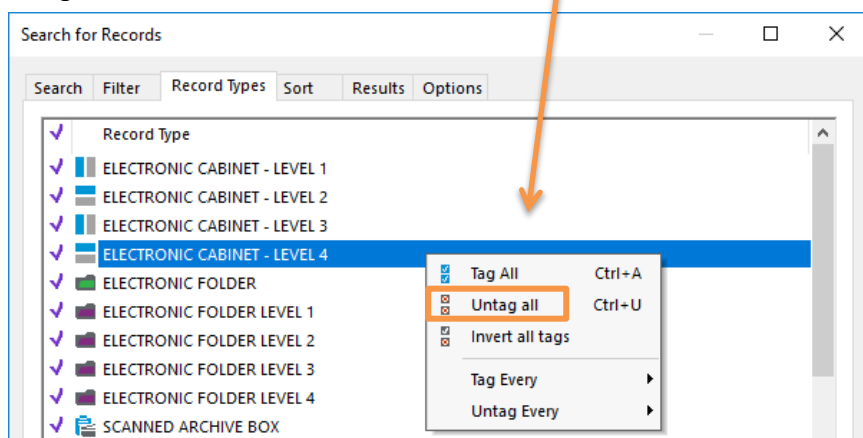
Record Types Tab

When you run a search, TRIM9 will include all record types in the search results by default. If you wish to see only a particular record type or a selection of record types in your search results, refer to the below instructions:

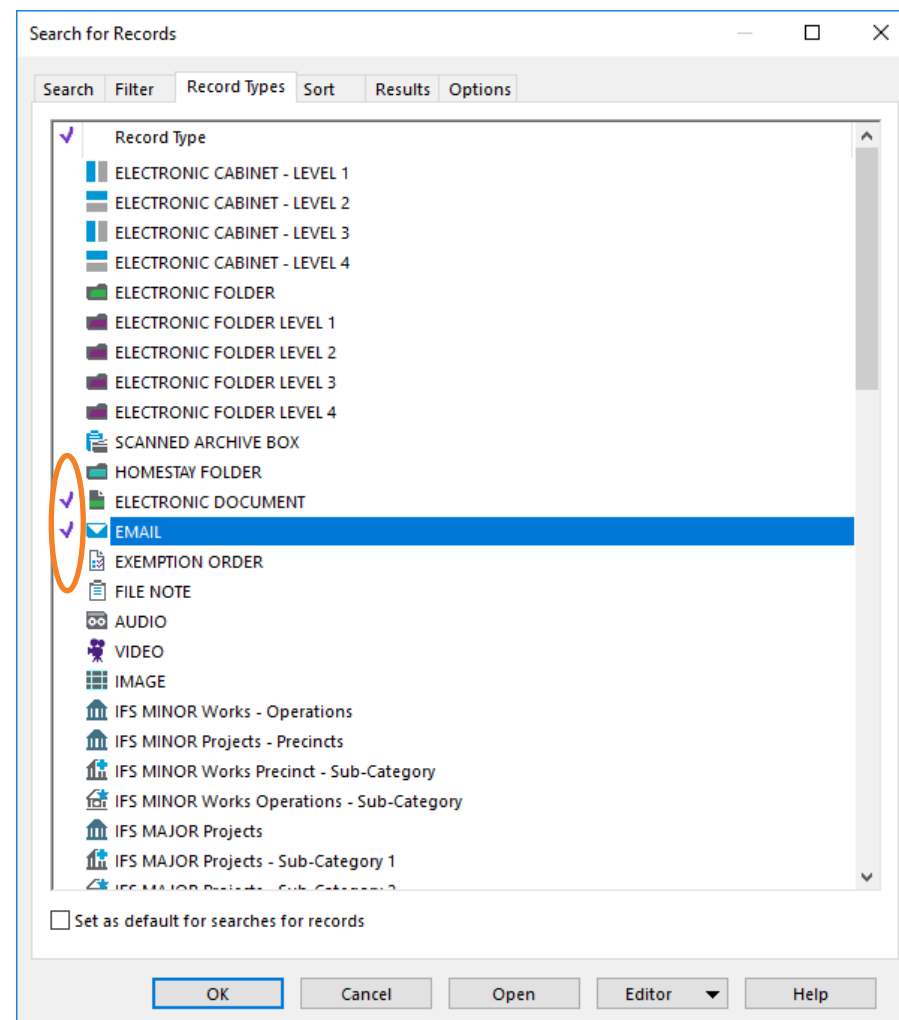
1. Click on the 'Record Types' tab:



2. Right-click anywhere in the window where the record types are listed and select **Untag all**:



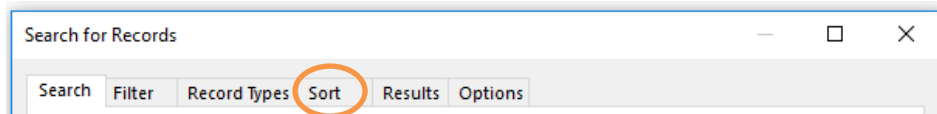
3. Retag all the record types you want to include in your search results by clicking your mouse cursor just to the left of each of the record types:



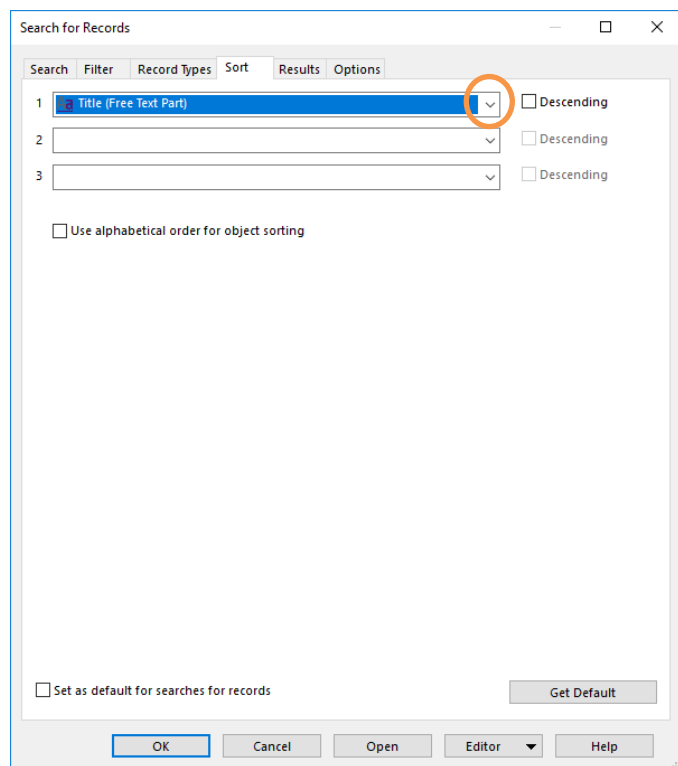
Sort Tab

When you run a search in TRIM9, by default the search results are sorted by 'Date Registered' in descending order; that is with the most recent date at the top of the list. If you wish to sort your search results differently and have them appear in a specific order, refer to the below instructions:

1. Click on the **'Sort'** tab:



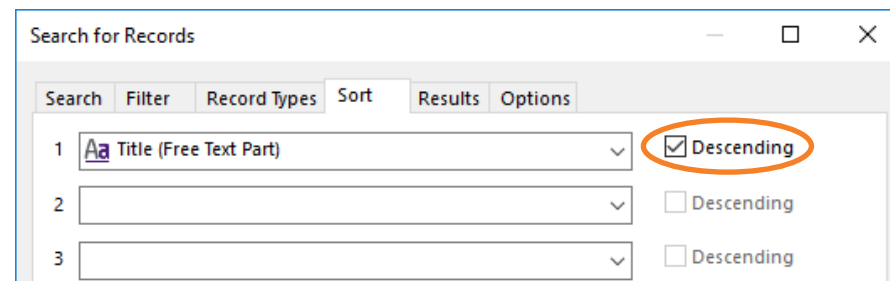
2. Click on the first **drop-down arrow** and select the field by which you want to sort the search results:



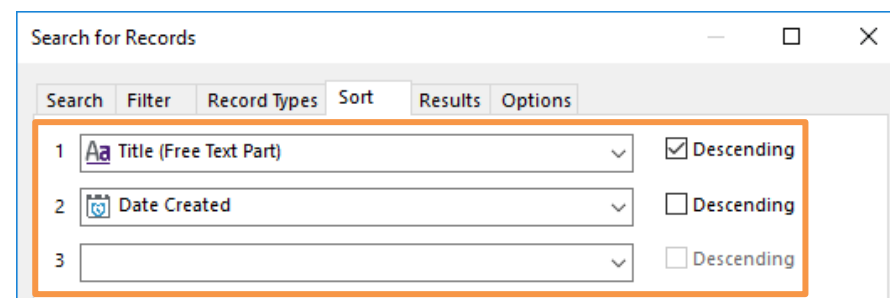
3. Decide if you want to sort your search results in ascending or descending order, and tick or un-tick the 'Descending' box as necessary:

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

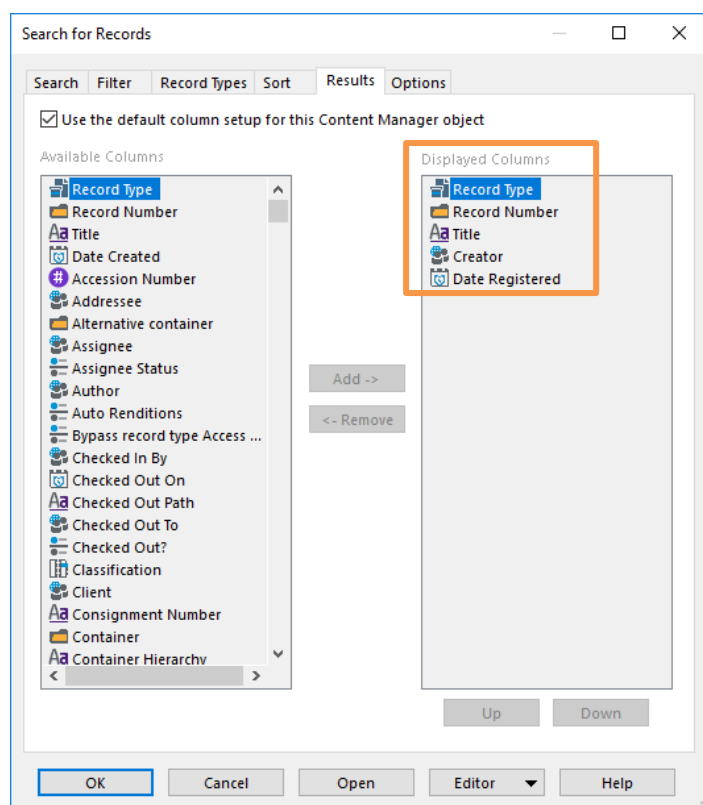
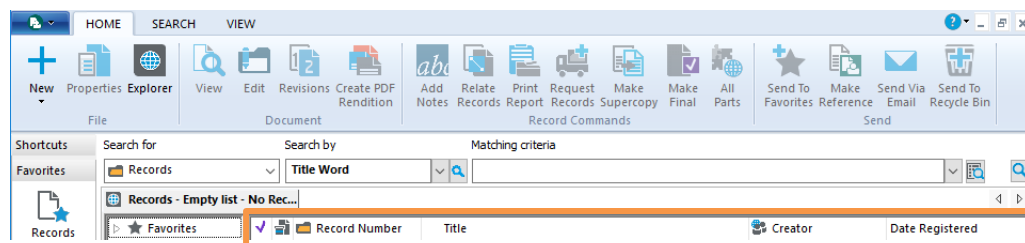


4. If you choose to populate the second and third fields, TRIM9 will sort the search results by the field in the first box, then by the field in the second box and finally by the field in the third box:



Results Tab

When you run an advanced search in TRIM9, by default, the columns you have displayed in your normal TRIM9 screen will be the columns that TRIM9 uses when displaying the search results (please refer to the below two screenshots):

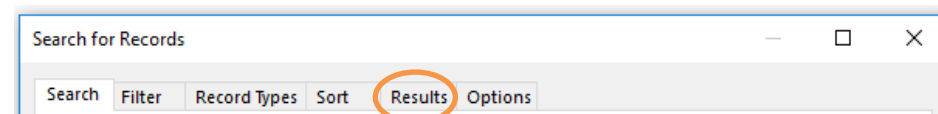


The 'Results' tab allows you to choose which columns TRIM9 should use when displaying your search results. This is useful if there is particular metadata (information about the record) such as 'Action Officer', 'Date Assigned', 'Due Date', 'School' etc. that is relevant to the search you are running. The columns that you or your team would find useful to include here will depend largely on your role within the organisation. When you have become familiar with using TRIM9 and the type of metadata that is routinely being captured into the system by your team and other TRIM9 users, you will then have a good idea on which columns you want TRIM9 to use when displaying particular search results.

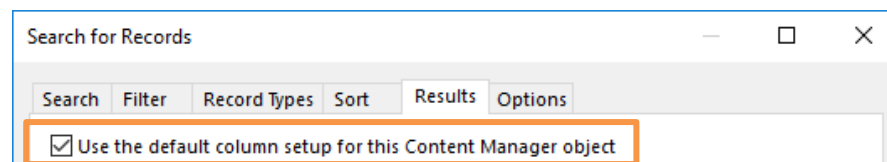
If you use the 'Results' tab to select particular columns for your search, TRIM9 does not keep this column selection or order of columns for subsequent searches. You can however save the search, which also saves the columns you selected. For more information about saving searches, please refer to the [TRIM9 - Quick Reference Guide - D20/235166 - Searching - Creating and Locating Saved Searches in TRIM9](#).

Refer to the below instructions to customise the columns TRIM9 will use when displaying the search results for your search:

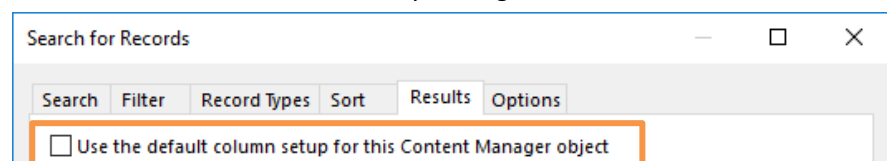
1. Click on the 'Results' tab:



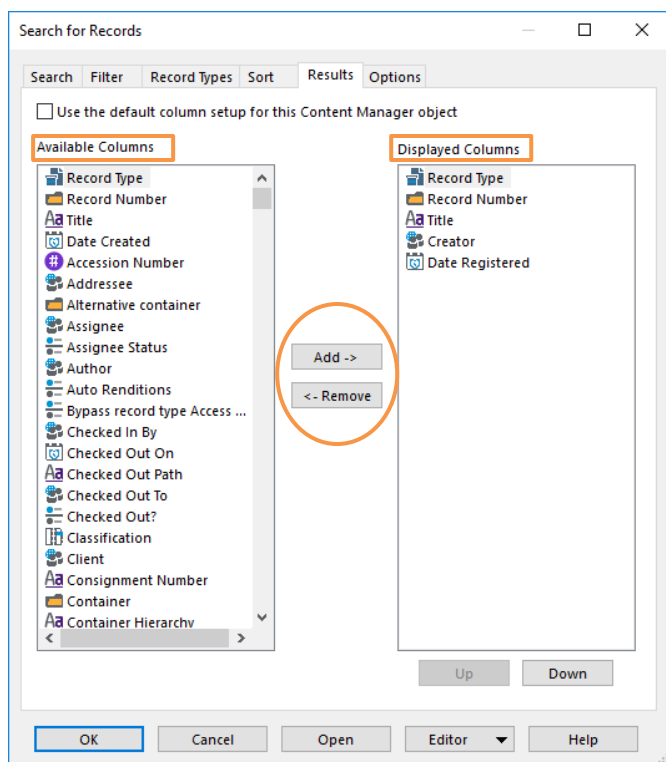
2. By default, there will be a tick in the 'Use the default column setup for this Content Manager object' checkbox:



Clear the tick from this checkbox by clicking it once:



3. On the left are all the 'Available Columns' that you can choose to use when displaying the search results for your search. On the right are all the currently selected columns ('Displayed Columns'):
 - To add a column to the 'Displayed Columns', simply locate it on the left of the window (under the heading 'Available Columns'), click on it once, then click on the **Add** button in the middle of the window
 - To remove a column from the 'Displayed Columns', simply locate it on the right of the window (under the heading 'Displayed Columns'), click on it once, then click on the **Remove** button in the middle of the window



Hint: Except for the first four columns under the 'Available Columns' heading, the available columns will list in alphabetical order. If you scroll through from A to Z you will notice that the alphabet commences again. These second lot of columns are Additional Fields (fields that have been added to TRIM9 specifically for UON).

4. To change the order in which the columns will display, under the 'Displayed Columns' heading on the right of the window, select the column you want to move by clicking on it once, then use the **Up** or **Down** buttons to change the order in which the columns display:

