

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:

Search fo	r Record	s					_		х
Search	Filter	Record Types	Sort	Results	Optio	ns			
Search	Ву								
Title \	Word							~	۹
Enter t	he words	to use for this	search						
1								\sim	۹
This se	earch met	hod requires m	ore inforr	nation.					
		New	Insert	Delet	e (.) NO	т	Reset	
ti	tle:								
	OK	Cancel		Open		Editor	•	Help	

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:

Search for Records		×
Search Filter Record Types Sort Results Options		
Search By		
Title Word Enter the words to use for this search		
	~	٩

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:

By Category	O By Format		Alphabetical		
Method Name		Caption	Category	Format	
Favorites					
Recently Used Methods					
⊳ <u>ab</u> Type					
∡ 💏 Text Search					
Aa anyWord		Any Word	🛱 Text Search	Word	
Aa content		Document Content	a Text Search	Content Text	
Aa idol		IDOL Query	Aa Text Search	Content Text	
Aa notes		Notes Word	A Text Search	Word	
Aa title		Title Word	🛱 Text Search	Word	
Dinked Navigation					
▷ 📩 Trays and Labels					
Reference and Control Numbers					
🖻 🖺 Document Management					
N Dates and Times					

Quick Reference Guide - Searching - Advanced Searching in TRIM9 (D20/251524)



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.

4. 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.)

Search for Records	_		×
Search Filter Record Types Sort Results Options			
Search By		_	
Title Word Enter the words to use for this search		\sim	٩
		\sim	۹

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:

earch fo	r Record	s						>
Search	Filter	Record Types	Sort	Results	Options			
Search	Ву							
Date	Registere	d					~	a
								-
Enter a	date an	d optionally a to	date for	a range s	earch	 		_
Enter a Match		d optionally a to	date for 18/09/20		earch			
	ing	d optionally a to			earch			
Match	ing	[And Up Until]			earch			

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:

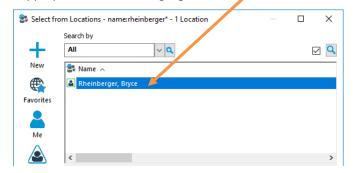
earch for Records	– 🗆 X
Search Filter Record Types Sort Results Options	
Search By	
Creator	~ 🔍
Enter the Location to search by	
	~ Q
Recursive	
Select search style for Location	
An individual Location	(~) <
Please type or use KwikSelect button to enter a Location.	—

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.

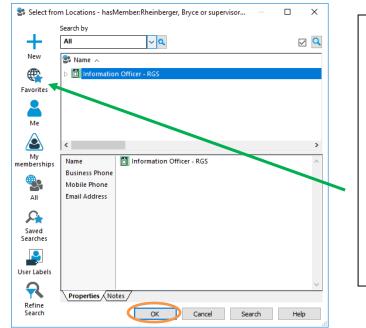
If you are looking for a 'Position' title such as 'TRIM Administrator' or 'Manager Records Governance Services', or other location such as a School or Business Unit; search for a person who is in that location (as above, type their surname into the 'Enter the Location to search by' field, then click 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 \rightarrow Send To \rightarrow 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. 5. When you have entered in your search criteria for your first search method, click **New** to add an additional search method:

Search fo	r Records	5					_		×
Search	Filter	Record Types	Sort	Results	Options				
Search	Ву								
Creat	or							~	Q,
Enter t	he Locati	on to search by							
Inform	nation Of	fficer - RGS						~	Q.
Rec	ursive								
									*
Select	search stv	le for Location							
	lividual L								\sim
		New	Insert	Delete	()	NOT		Reset	
cr	eator:Inf	ormation Officer	r - RGS						
	ОК	Cancel		Open		Editor	•	Help	



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:

Search fo	r Record	s					—) ×
Search	Filter	Record Types	Sort Resul	ts Options				
Search	Ву							
Creat	or							~ Q
Enter t	he Locati	ion to search by						
Inform	mation O	fficer - RGS						~ Q
Select	ursive search st dividual L	yle for Location .ocation						*
	eator:Inf	R New ormation Officer or:Information O		Delete	()	NOT	Reset	
		OK	Cancel	Open	E	ditor 🔻	Не	lp

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):

earch for Records					
Search Filter Record	Types Sort Results	Options			
	types sort Results	Options			
Search By					
Date Registered					~ ℃
-	ally a to date for a range s	search			
Matching	~ 2/10/2020				•
[And Up l	Jntil]				•
More search options					×
Specific date or range o	f dates, e.g 1/1/2007 to 2/	/2/2008			\sim
	lew Insert	Delete) NOT	Re	set
creator:Information	Officer - RGS				
and registeredOn:2	/10/2020				
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	R	eset
creator:Information Officer - RGS		_
and registeredOn:This Week		
1		
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 Filter Record Types	Sort Results	Options					
Search By							
Date Registered					~ <	2	
Enter floating value type and a	single type of time in	nterval					
This	÷ Week		\sim	*		*	
More search options						*	
Floating range, single time int	erval, e.g. this week				•	~	
			_				
			Ł				
@ 1102 0.00	land	2-late ()	NOT				
AND OR New	Insert	Delete ()	NOT	R	eset		
creator:Information Office	er - RGS	Delete ()	NOT	R	eset		
	er - RGS	Delete ()	NOT	R	eset		
creator:Information Office	er - RGS	Delete ()	NOT	R	eset		
creator:Information Office	er - RGS	Delete ()	NOT	R	eset		
creator:Information Office	er - RGS	Delete ()	NOT	R	eset		
creator:Information Office	er - RGS	Delete ()	NOT	R	eset		
creator:Information Office	er - RGS	Delete ()	NOT	R	eset		

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 <u>Steps 5 to 10</u> 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:

Search	Filter	Record Typ	oes Sort	Results	Options			
Search	Ву							
Creat	or							\sim
Enter t	he Locati	on to search	h by					
Senio	r TRIM A	dvisor - RGS	1					\sim
Rec	ursive							
Colort	earch ch	le for Locati	ion					
		le for Locati	ion					
	search sty lividual Lo		ion					
			ion		1			
			ion		ţ			
An inc			Insert	Delet	;e ()	NOT	Re	eset
	lividual L	New	Insert		e ()	NOT	Re	eset
An inc	lividual Lo	New Ormation Of	Insert fficer - RGS		;e ()	NOT	Re	eset
An inc An Inc ANE ANE	lividual Lo O OR reator:Inf	New ormation Of	Insert fficer - RGS Week)		:e ()	NOT	Re	eset
An inc An Inc ANE ANE	lividual Lo O OR reator:Inf	New Ormation Of	Insert fficer - RGS Week)		ie ()	NOT	Re	eset
An inc An Inc ANE ANE	lividual Lo O OR reator:Inf	New ormation Of	Insert fficer - RGS Week)		;e ()	NOT	Re	eset
An inc An Inc ANE ANE	lividual Lo O OR reator:Inf	New ormation Of	Insert fficer - RGS Week)		:e ()	NOT	Re	eset
An inc An Inc ANE ANE	lividual Lo O OR reator:Inf	New ormation Of	Insert fficer - RGS Week)		:e ()	NOT	Re	eset
	lividual Lo O OR reator:Inf	New ormation Of	Insert fficer - RGS Week) Advisor - R		ie ()	. NOT		eset

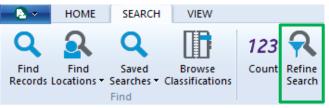
Quick Reference Guide - Searching - Advanced Searching in TRIM9 (D20/251524)

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

Search fo	r Records						—		×
Search	Filter	Record Types	Sort	Results	Options				
Search	Ву								
Creator v Q									
Enter t	he Locatio	on to search by							_
Senio	r TRIM Ad	lvisor - RGS						\sim	٩
Rec	ursive								
Select	search styl	le for Location							
An inc	lividual Lo	ocation							\sim
		New	Insert	Delet	e ()	NOT	R	eset	
V (c	reator:Info	ormation Office	r - RGS						-
🗸 ar	nd registe	redOn:This We	ek)						
0	r creator:S	enior TRIM Adv	isor - RGS						
I									
	ОК	Cancel		Open		Editor 🔻		Help	

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:





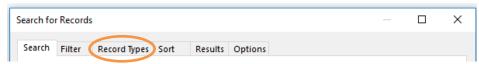
14. In addition to the 'Search' tab in the 'Search for Records' window, there are five other tabs which allow you to filter your search even further and choose how the results will display. As you are learning to perform advanced searches, you may want to explore these tabs to discover exactly what options 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:

Search fo	r Record	s				—	×
Search	Filter	Record Types	Sort	Results	Options		

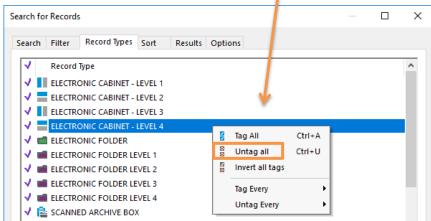
Record Types Tab

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**:



Quick Reference Guide - Searching - Advanced Searching in TRIM9 (D20/251524)

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:

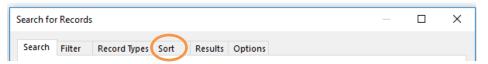
Search fo	or Records	s							_		×
Search	Filter	Record Types	Sort	Results	Options						
	Record	Tupe									^
ľ,	_										
		ELECTRONIC CABINET - LEVEL 1									
		ELECTRONIC CABINET - LEVEL 2									
		ELECTRONIC CABINET - LEVEL 3 ELECTRONIC CABINET - LEVEL 4									
11.2		ONIC CABINET -	LEVEL 4								
11.2	_	ONIC FOLDER									
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	SCANN	ED ARCHIVE BO	x								
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		IOR Works - Op									
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	-	JOR Projects - Su	-								v .
		It for searches fo									
	_										
		OK	Car	ncel	Ope	n	Ed	itor	•	Help	



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:

Search for Records	— 🗆 X
Search Filter Record Types Sort Results Options	
1 Aa Title (Free Text Part)	Descending
2	Descending
3	Descending
Ute stable tipl order for object conting	
Use alphabetical order for object sorting	
Set as default for searches for records	Get Default
OK Cancel Open Editor	Help

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

Search for Records	- D X
Search Filter Record Types Sort Results Options	
1 Aa Title (Free Text Part)	✓ ✓ Descending
2	∼ Descending
3	✓ Descending

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:

Search for Records		— 🗆	×
Search Filter Record Types Sort Results Options			
1 Aa Title (Free Text Part)	~	Descending	
2 🔯 Date Created	\sim	Descending	
3	\sim	Descending	



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):

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+ 6		i 🗈 🛋	ah 💽 🖡	1 📑 🗈		s 🕹 🖻	
New Prop	erties Explorer View	Edit Revisions Create Pl				II Send To Make	
Ŧ	ile	Renditio Document		ort Records Supercop Record Commands	y Final Pa	rts Favorites Referer	nce Email Recycle Bin Send
Shortcuts	Search for	Search by	Matching c	riteria			
Favorites	ecords 💼	✓ Title Word	~ 🤍				✓ <a>I
<u>Γ</u>	Records - Empty list	- No Rec					4 Þ
Records	Favorites	🗸 📲 📹 Record Num	ber Title			🚏 Creator	Date Registered
Search for	Records			— 🗆	×		
Search	Filter Record Type	s Sort Results	Options				
🗹 Use f	the default column set	tup for this Content N	/lanager object				
Availabl	le Columns		Displayed Colur	nns			
Rec	cord Type	~	Record Typ	e			
💼 Red	cord Number		💼 Record Nu				
Aa Titl	e te Created		Aa Title				
	te Created cession Number		Date Regis	tered			
	dressee						
	ernative container						
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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:

Γ	Search for Records							×
					\frown			
	Search	Filter	Record Types	Sort	Results Options			
					\smile			

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

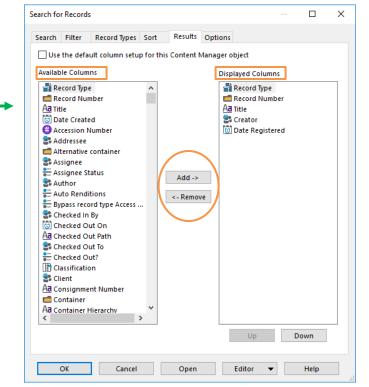
Search fo	r Records	;					—	×
Search	Filter	Record Types	Sort	Results	Options			
🗹 Use	Use the default column setup for this Content Manager object							

Clear the tick from this checkbox by clicking it once:

Search for Records	—	×
Search Filter Record Types Sort Results Options		
Use the default column setup for this Content Manager object		



- 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:

Search for	Records							×
Search	Filter	Record Types	Sort	Results	Opt	tions		
-		ılt column setuj	p for thi	S Content N	/lana		_	
	e Columr	eal Decision				Displayed Columns	_	
	te of Birth					Record Number		
		didature Variat. Imencement				Ad Title		
1 Dat	te of Com	pletion or Dis				Aa External ID		
	te of Deci	sion S/DVC(R) Deci				Aa Faculty / Division	1	
		(A) or SMC Dec.				Date Received		
		I Signature		Add ->		🚺 Date Due		
	te of First te of Loss			<- Remov	ا م			
		Milestone		X- Kelliov	C			
	te of Noti te of Offe							
	-	gress Report						
	te of PVC te Publisł							
	te Receive							
		y Clearance Re. ualifications R.						
	-	Field Last Upd.						
T Dat	te Supera	nnuation Rece	×					
						Up	Down	
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C	Ж	Cancel		Open		Editor 🔻	Help	