


## Simple Search

1. In TRIM (HPE Records Manager), go to the **Find Records Pane**.



2. **Search For:** choose a search type e.g. Records.
3. **Search By:** choose a search method e.g. Title Word.
4. **Matching Criteria:** enter a value for the search method (e.g. HP Records Manager Implementation).
5. Select the **Find**  button to run the search.

The search results will appear in the window below.

## Searching Tips & Pointers

- A wildcard \* (asterisk) can be used to enhance search terms e.g. Administrat\* would return words such as Administration, Administrator, Administrative, Administration's, etc.
- **Recent Documents** and **Recent Files** will show the last 25 Records that users have worked with.
- Add **Records** you frequently use to your **Favourites** by **Right-clicking** on the Record and selecting **Add to Favourites**.
- Simple searches often return a lot of results, so the search might need to be refined. **Press F7** after the search has run to refine the query.
- Use the **Filter tab** to filter the search by specific File Types e.g. PDF or Docs, or Record Type e.g. Electronic Document or File.

## Dynamic Search Terms

### Searching Locations

- Me (*where the location is the user logged into TRIM*)

### Searching Dates

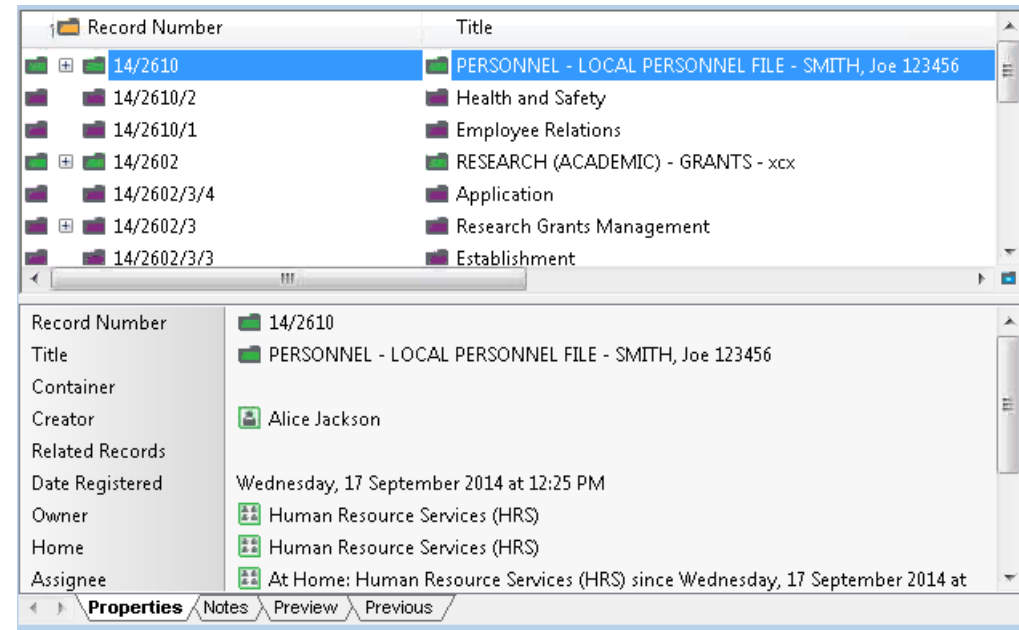
- Today, Yesterday, Tomorrow, This Week, Previous Week, This Month, Previous Month, This Year, Previous Year

**Note!** If the same search is run often, save the search criteria as a **Saved Search**.

## Sorting Search Results by Columns

To sort search results by Columns, select the column header to sort.

- **Record Number:** Usually appears first in the list.
- **Title:** Appears in alphabetical order A→Z, click again for Z→A order.
- **Date Created:** Appears oldest to newest, click the column header again to reverse the order.
- **Creator:** Appears alphabetically by Surname, click the column header again to sort in descending order.



Record Number	Title
14/2610	PERSONNEL - LOCAL PERSONNEL FILE - SMITH, Joe 123456
14/2610/2	Health and Safety
14/2610/1	Employee Relations
14/2602	RESEARCH (ACADEMIC) - GRANTS - xcX
14/2602/3/4	Application
14/2602/3	Research Grants Management
14/2602/3/3	Establishment

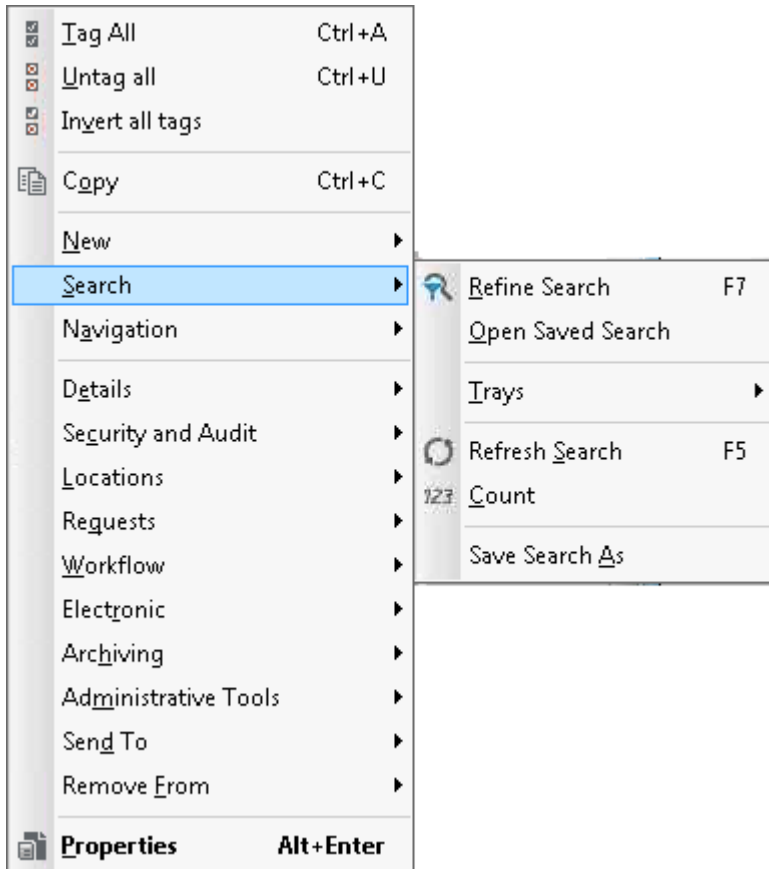
  

Record Number	14/2610
Title	PERSONNEL - LOCAL PERSONNEL FILE - SMITH, Joe 123456
Container	
Creator	Alice Jackson
Related Records	
Date Registered	Wednesday, 17 September 2014 at 12:25 PM
Owner	Human Resource Services (HRS)
Home	Human Resource Services (HRS)
Assignee	At Home: Human Resource Services (HRS) since Wednesday, 17 September 2014 at

## Saving Searches

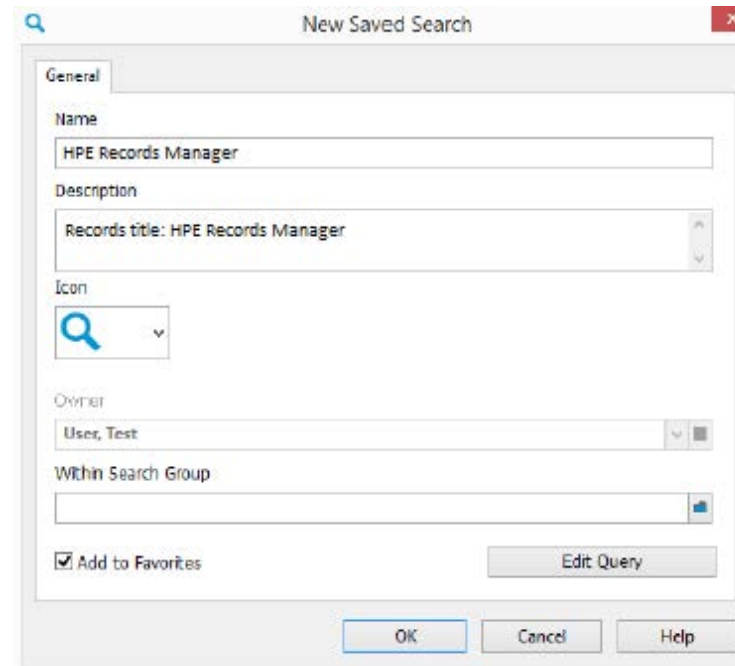
1. After running a Search, right-click in the search results window and select: **Search > Save**

### Search As.



2. In the New Saved Search window, **Name** your search and ensure that the **Add to Favourites** checkbox is ticked.

**Note!** The **Description** can be updated to match the Search criteria.



3. Select **OK** to save the Search.
4. To access a **Saved Search** select the Saved Search Icon on the **Favourites Shortcut Bar**.

