3 SEARCHING

3.1 INITIATING A NEW SEARCH USING THE “RESET TRIM SEARCH” BUTTON

The Reset TRIM Search button in the menu bar will always result in a clean search being initiated (i.e. it will not inherit any filters set during a previous search):

Click the Reset TRIM Search button. The Find Records dialogue box will then pop up:
3.2 SEARCH TAB

The Search tab allows you to select the type of search method that you wish to use and to enter the relevant text. Common search methods include Title Word, Record Number, Creator, and Date Created.

Click the yellow folder to the extreme right of the Search By field:

A dialogue box called Search Methods will pop up. The search methods can be displayed in categories or as a single list:

If using the categorised display, expand each option using the +

Select the desired search method. Click OK.

This will return you to the Find Records screen. Enter the text you wish to search for in the Equal To field:
Click **OK**

**NB** - If the Equal To field is left blank you cannot run a search – even if you have used the Filter tab to set parameters for your search.

After you have used a search method once it will then display in the drop down list in the **Search By** field (to the left of the yellow folder icon).

### 3.3 BOOLEAN SEARCHING

Multiple search terms can be set by selecting **New** and then adding an additional search type. Boolean searches work on the **And, OR, Not** principle. E.g. Creator “Bloggs, Joe”, and Title Word “Madsen” etc.
3.4 **SORT TAB**

Currently the **Sort** tab does not affect the search results. Do not use the sorting facility here – run the search, and sort the results via the column headings.

3.5 **FILTER TAB**

The **Filter** tab allows you to refine your search to only return results of a certain Record Type, Status or Disposition.

Under the **Record Type** section, right click and select **Untag All**:
Then individually tag the record types that you do wish to search on by clicking in the white space to the left of the record type name – e.g. Electronic Folder, Document, User Subfolder – as shown below a tick will be placed next to the selected record type:

If you have not populated the **Search** tab please ensure that you do so before clicking **OK**.

If you wish to search for records that are Inactive, Destroyed or Archived uncheck the **Active** checkbox under **Disposition**:

Likewise, if you would like to ensure that your search results are confined to records that are active and usable make sure that **Active** is checked and uncheck all other options available under the **Disposition** section.

If you have not populated the **Search** tab please ensure that you do so before clicking **OK**.
For document searches, you can filter your results to return only documents that have been **Declared As Final** or alternatively, **NotDeclared As Final**. The default is to search for both, as many users do not finalise documents in a consistent manner. (Finalising a document means that the document cannot be edited.)

![Filter Options](image)

### 3.6 MODIFYING A SEARCH USING “TRIM SEARCH” BUTTON

If you have made a typo or want to change one of the search parameters you set, you can select TRIM Search from the top menu bar – this will retain all of the criteria that you set for the previous search – including Boolean search terms and filters - so that you only have to edit fields rather than start from scratch.

![TRIM Search Options](image)

### 3.7 SEARCH RESULTS DISPLAY

The search results will display in the right hand side of the screen.
You may notice your Favourite Searches option in the left hand pane expands. If you close the Favourite Searches using the + your search results will disappear. It is best to leave the Favourite Searches option expanded.

To view the contents of a folder **double click** on the folder name. The Subfolders or Documents will be displayed in the right hand pane. When you open a folder from your search results it will then list under the New Search button in Favourite Searches on the left, whilst the folder contents are displayed on the right.
3.8 SEARCH PROGRESS AND COUNT

Search results do not display until all of the relevant records have been retrieved. While the search is in progress you can see the result count accumulating in the bottom left of the screen.

A final count of the number of records retrieved will then display:

3.9 NO SEARCH RESULTS

If there are no search results the following message will be displayed in the right pane.

Use the TRIM Search button (See Section 3.2) to modify the search criteria.

3.10 PERSONAL SEARCHES / FAVOURITES SEARCHES

After running a search you are able to then save that search criteria under Personal Searches or Favourite Searches. Saving a search allows you to re-run a complex search at a later date without having to recreate all of the relevant criteria. Personal and Favourite Searches are personal - they can only be viewed by you.
After performing a search, expand the menu item **Personal Searches** to display its contents. Right click over **New Search** and select **Save my Last Search**, as below:

The **New Saved Search** dialogue box will appear:

Under **Name** type a title for your search so that you will recognise it later. Records Management Services recommends that you include an agreed **acronym** for your department as a prefix for the saved search name.
Do not modify the **Description** field – this contains a summary of the search criteria that you are saving. The search criteria is also present under the Search, Sort and Filter tabs, if you wished to review it before saving.

(If you wish to save this under **Favourite Searches** select the check box **Add this Saved Search to your Favourites Tray**.)

Click **OK**.

The search will now be displayed under **Personal Searches**:

If you wish to modify the search criteria at a later date, right click on the search name and select **Edit this Search**:

This will open up a dialogue box similar to the **New Saved Search** screen where you can use the Search, Filter and Access Controls tabs to modify the search criteria.

To run a saved search, click on the search name. The Find Records dialogue box will pop up. Click **Ok** without making any modifications. Sometimes if you re-run the same saved search
in one session it will bypass the Find Records dialogue box and will simply display the search results in the left pane underneath the Search name.

3.11 “NEW SEARCH” IN PERSONAL SEARCHES/FAVOURITE SEARCHES

By expanding Favourite Searches or Personal Searches in the left hand list options you will find that there is a New Search button. This is the same as the TRIM Search button i.e. it will inherit all the values of your most recent search including any filters that you set. Records Management Services suggests you use the two search options in the menu bar instead of this feature.

3.12 SHARED SEARCHES

A Shared Search is a saved search that has been opened up for other people to view. You can share it with one other person, a whole department or any combination of people/departments provided they are registered Records Online user.

The search criteria will be the same for everyone – however, the results may vary from person to person depending on their access rights. Please bear this in mind if you are unable to view files that one of your colleagues can see. If you think that you should be able to view a file and you cannot, please notify Records Online to review your access rights.

To create a Shared Search run the search and follow the same steps as outlined in Personal Searches. Then email records.online@sydney.edu.au with the exact name of the saved search and the names of the users requiring access to the saved search, the Helpdesk will update the access controls and send you through an email notification to let you know the shared search is now available. Please then communicate this to the rest of the users in the access group.