

## TRIM Upgrade 2022 Refining a search

## **REFINING A SEARCH**

- 1) Run the search
- 2) On the 'Search' ribbon, select 'Refine search'

Q       Q       Q       Q       User Labels       Image: Tag All         Records Locations Workflows Activities       Classifications       Classifications       Image:	но	HOME SEAF	CH VIEV	W MANAGE	ADMINISTR	ATION			-		
Search earch As Search Search	Records Locati	cations Workflow	s Activities	Classifications	🕞 User Labels	<ul> <li>Tag All</li> <li>Untag All</li> <li>Invert All Tags</li> </ul>	<b>123</b> Count	Refine Search	Save Refrest earch As Search	G Go Back G Go Forward G Go To Search	Hadd To + Kemove From +
Find Browse Records Tag Current Search		Find		Browse	Records	Tag			Cur	rent Search	

- 3) From here either;
  - a. Refine by disposition this is the status of the record, i.e. Active, Destroyed, Archived etc.
  - b. Refine by item type this is the type of results you want to see, i.e. Central Files, HR Files etc.

Search for Records - C X	Search for Records —						
Search Filter Record Types Sort Results Options	Search Filter Record Types Sort Results Options						
Use default filters for searches for records	Use default filters for searches for records						
Records with Disposition: Records with Record Class:	Record Type	^					
Vital	V E CENTRAL DOCUMENT						
🗸 년 Inactive 🗸 Corporate	CENTRAL FILE						
🗸 📑 Archived (Keep Forever) 🗸 Workgroup	CERTIFICE OF THE PRESIDENT AND VICE-CHANCELLOR DOC						
🗸 🔄 Destroyed 🗸 Personal	✓						
🗸 🛅 Archived (Custody Transferred) 🛛 🗸 Reference	SENIOR REMUNERATION DOCUMENT						
√ <sup>1</sup> Temporary	V 🗂 SENIOR REMUNERATION FILE						
	V 🗎 LEGAL DOCUMENT						
Records with Date Registered Within 🗸 Days	V 💼 LEGAL FILE						
Unfinalized	V 🗎 CONTRACT DOCUMENT						
✓ Finalized	V 💼 CONTRACT SUB FILE						
File Types (enter a list of file types separated by ';')	V CONTRACT FILE						
	🗸 🖺 eSOLUTIONS DOCUMENT						
Within mathew Caud Caude	🗸 🗂 eSOLUTIONS FILE						
within another saved search	V 💾 BUSINESS CONTINUITY & ICT DISASTER RECOVERY DOC						
	V 🗂 BUSINESS CONTINUITY & ICT DISASTER RECOVERY FILE						
Set as default filters for searches for records	V 💾 PROJECT DOCUMENT						
	V 🗂 PROJECT SUB FILE						
	V 🗂 PROJECT FILE						
	V 🖾 DATA STORAGE	~					
	Set as default filters for searches for records						
OK Cancel Open Editor <b>v</b> Help	OK Cancel Open Editor 🔻	Help					

- **4)** On both of these screens, the options will be greyed out. To amend this, untick the box 'Use default filters for searches for results' on either screen.
- 5) Continue refining as necessary, then select OK to run the refined search.