



TRIM: Advanced Searching, Quick Find, Saved Searches

Advanced Searching

If required you can combine search methods to narrow a search result. This function can be done in a new search, or when refining a search:

Open a new Search or refine a Search (F7)

Insert the first
Search By method

And search value
Equal To

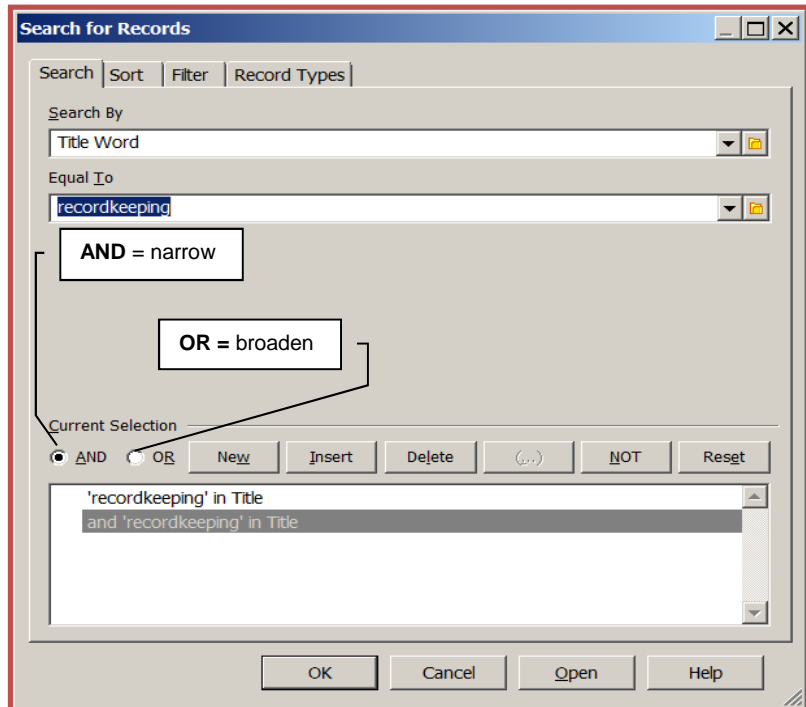
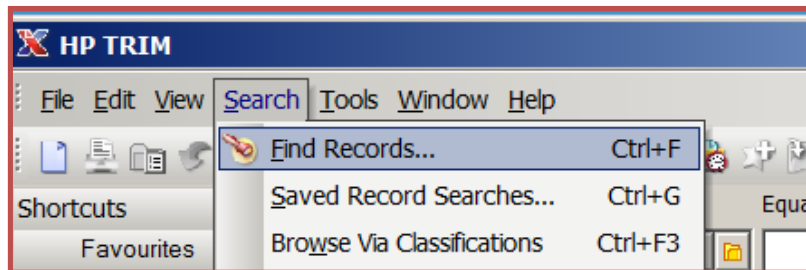
If refining a search, this will already be displayed

To insert a new search criterion

Click
New

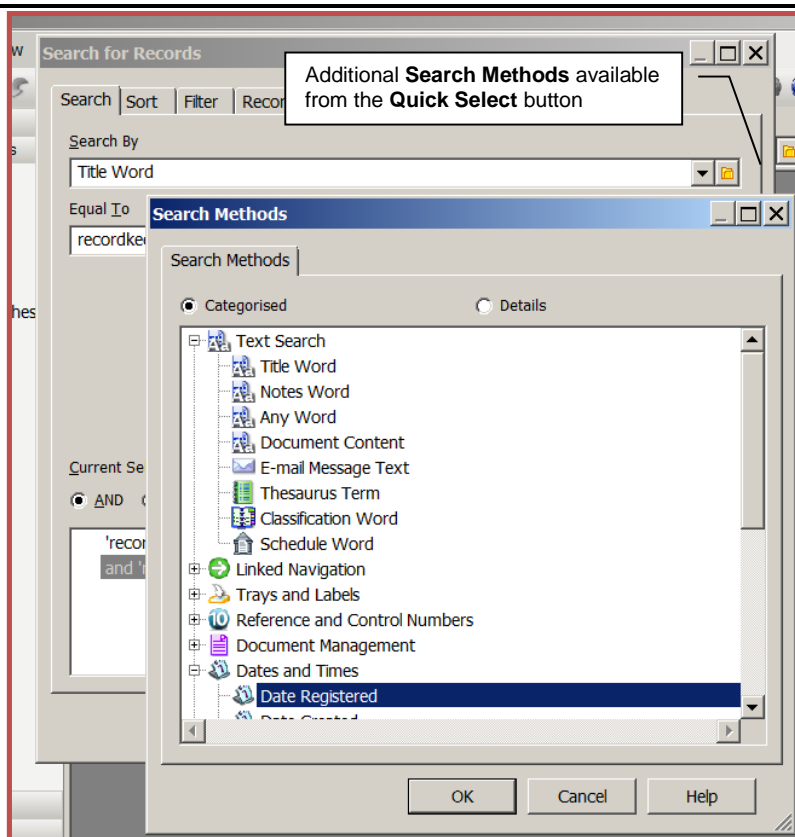
Select the appropriate search combination tools: **AND** or **OR**

- The AND combination will only return those records that meet all search criteria. This narrows a search, returning fewer records but pinpointing the required records.
- The OR combination will return all records that meet any of the search criteria. This broadens a search, returning more records and including a wider subject range.



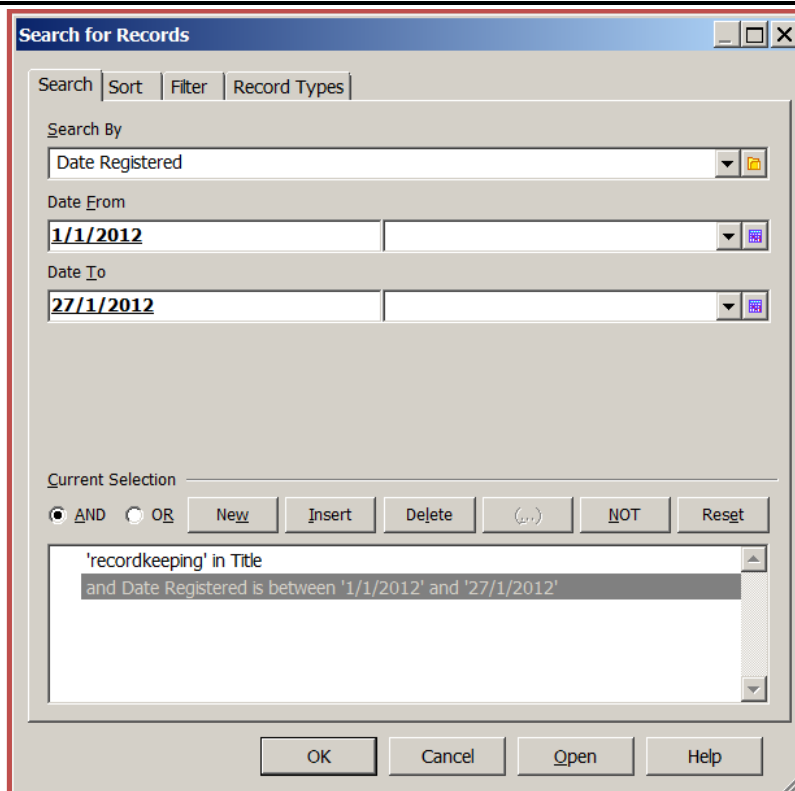
Select an additional Search Method

Click
OK

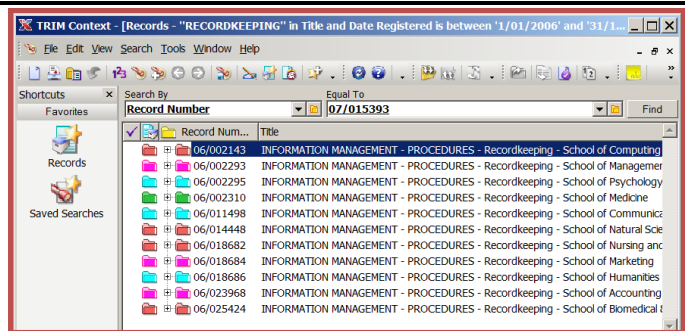


Insert the search value (in this case a date range)

Click
OK



The results of your search will be displayed



Other Advanced Tools

- New:** Adds a new line to your search at the bottom of your existing criteria.
- Insert:** Adds a new line to your search above the currently selected criteria.
- Delete:** Deletes the currently selected search criteria from the Current Selection box.
- (...):** Enables you to group search criteria together. This has the effect of mathematical brackets, where lines that are bracketed are always dealt with together as one, and will precede any other operations. The Brackets (...) button will remain greyed out until two or more search lines are selected.

To select multiple lines:

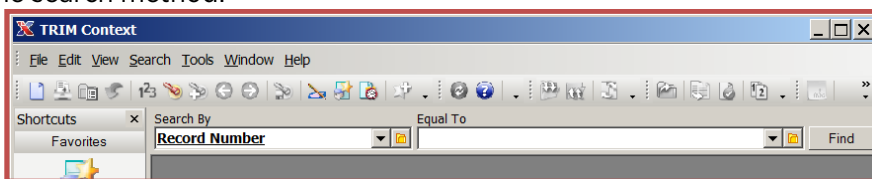
1. Using the mouse, click in front of a search criterion.
2. Click in front of another search criterion.

These search criteria will now be tagged and any operation performed will affect all tagged criterion.

- Not:** Enables you to exclude records that have a specified value from the search results. If you have tagged search criteria, the Not function will exclude all tagged criterion.
- Reset:** Deletes (once you confirm) all search criteria from the Current Selection Box, allowing you to compose a new Search.

Quick Find

The Quick Find function is available on the Search toolbar. It will allow you to search across one search method.



Insert the Search Method into the first Quick Find field. The search method can be selected using the KwikSelect or the Drop Down list. The Drop Down list reveals a listing of up to the last 25 search methods used with the Quick Search.

Insert the search value into the search field. The search value may be typed directly into the field or you may use the KwikSelect or Drop Down list. The Drop Down list reveals a listing of up to the last 25 search values used with the selected search method via the Quick Search.

Once you have filled in both fields, press *Enter* on the keyboard and the search results will be displayed.

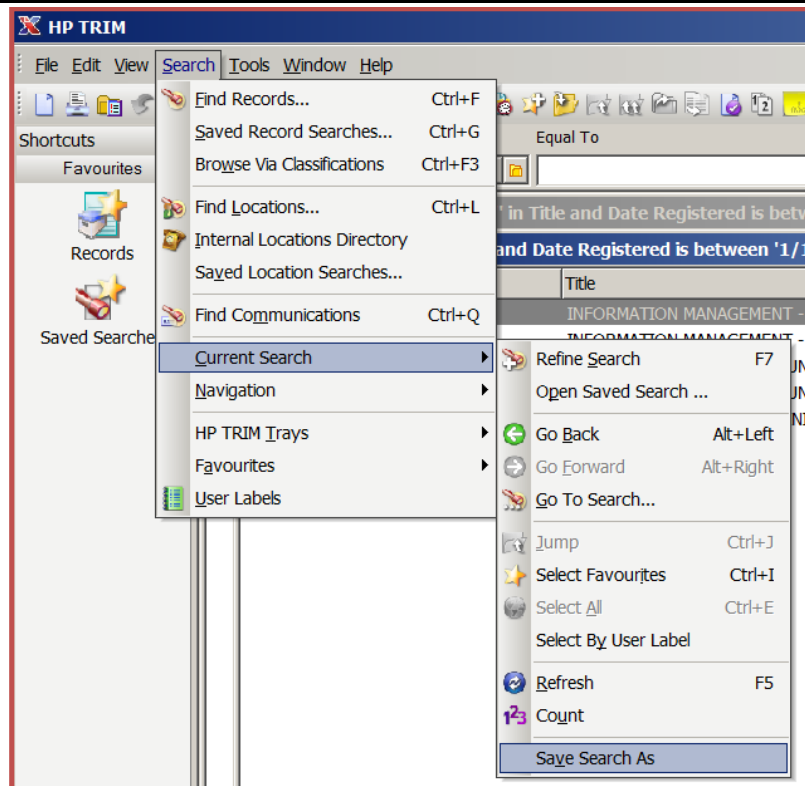
Saved Searches

It is possible to save searches for regular use. This is helpful if you regularly conduct the same search. It is the search criterion that is saved, not the search results.

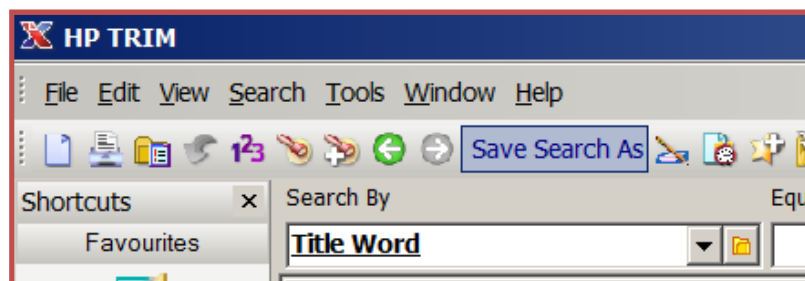
Perform the search you wish to save

From the **Search** menu, select **Current Search**

Save Search As



(or use the Save Search As toolbar button)



The Save Search wizard will appear: enter the following details.

Name:

Enter a name for your search that will be easy to identify in future (maximum of 30 characters). Each Saved Search name must be unique.

Icon:

Select an icon that you will easily recognise.

Owner:

Defaults to you, change if you are creating the search on behalf of someone else.

Within Search Group:

Enter a Search Group name – if it doesn't exist TRIM will ask you if you want to create one. Search groups help you organise your saved searches.

Add to Favourites:

Tick to add your Saved Search to your Favourites

Click

Access Controls
tab

New Saved Search

General | Access Controls

Name

Description

Records - "TRIM" in Title and Date Registered is between '1/1/2012' and '27/1/2012' - Filtered

Icon

Owner

Flynn, Sharon

Within Search Group

Add to Favourites

Edit Query

OK Cancel Help

Access Controls

Access Controls enable you to restrict access to the saved search. The following controls can be placed on the search:

Can Use: Who can run this Saved Search.

Can Update: Who can edit/modify this Saved Search.

Can Modify Access: Who can change the Access Control settings on the Saved Search.

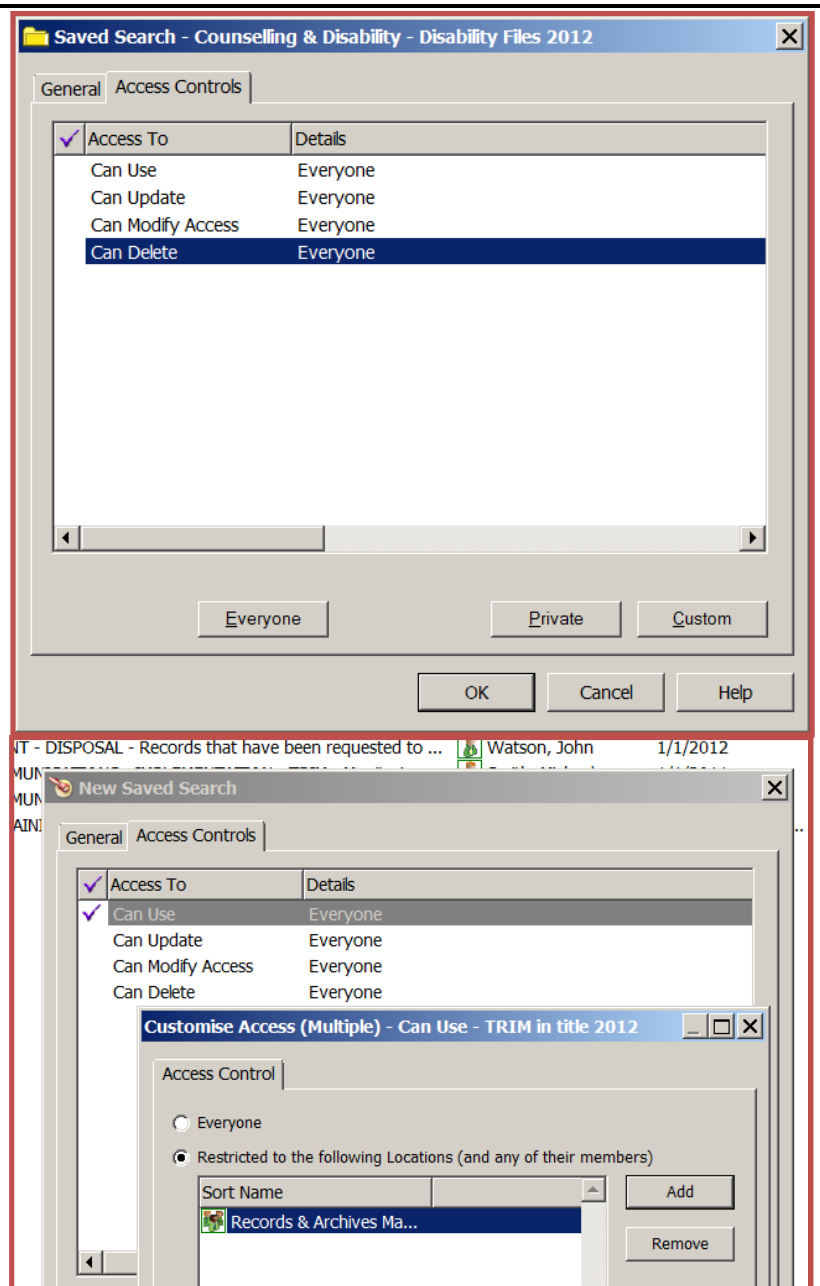
Can Delete: Who can delete the Saved Search.

Each of these **Access Controls** can be set to:

Everyone: Open access

Private: Only you have access

Custom: You assign the Access Control to a location/locations



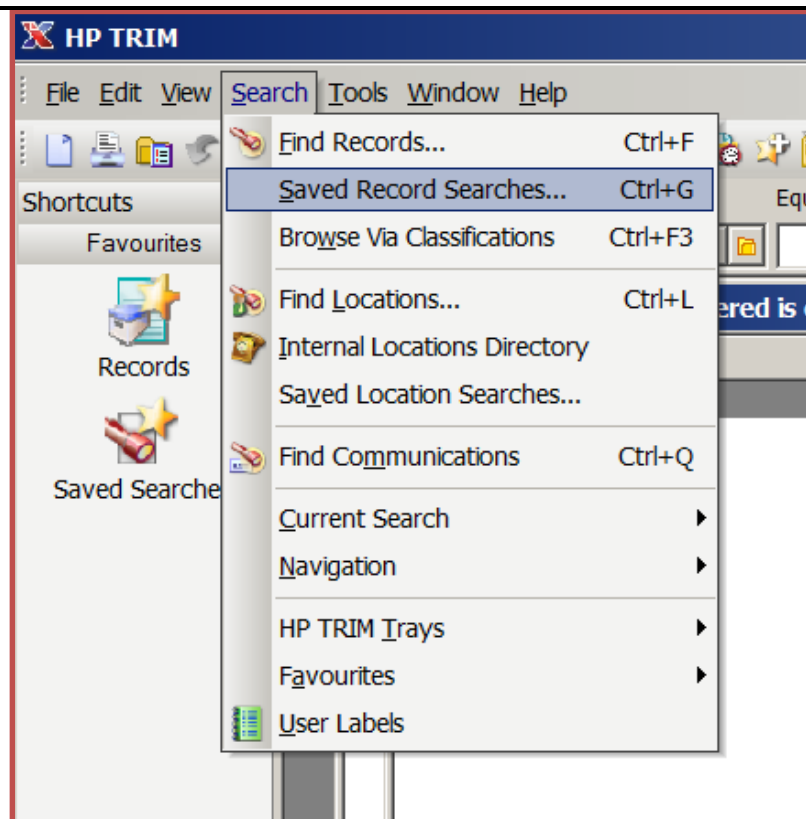
When saving searches that use dates e.g. Date Registered, you have a choice of using a fixed date or a meta-variable. If you want to do a daily search for records registered that day, rather than using a fixed date it is best to use the metavariable *TODAY*. This way you will always get the current day's records. The following meta-variables are available:

- Yesterday
- Today
- This Month
- Next 7 Days
- Tomorrow
- Next Month
- Next Week
- Year to date
- This Year
- Previous 7 Days
- Previous 14 Days
- This Week
- Previous Week
- Previous Month

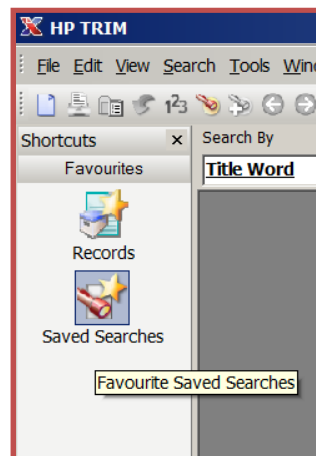
Accessing a Saved Search

From the Search Menu, select
Saved Record Searches

(or press *Ctrl + G*)



(or select *Saved Searches* from your *Favourites* toolbar)



A list of all available Saved Searches will appear

Double click on the desired search

You can refine your list if you have created Search Groups.

Type in the name of your Search Group

Click
OK

