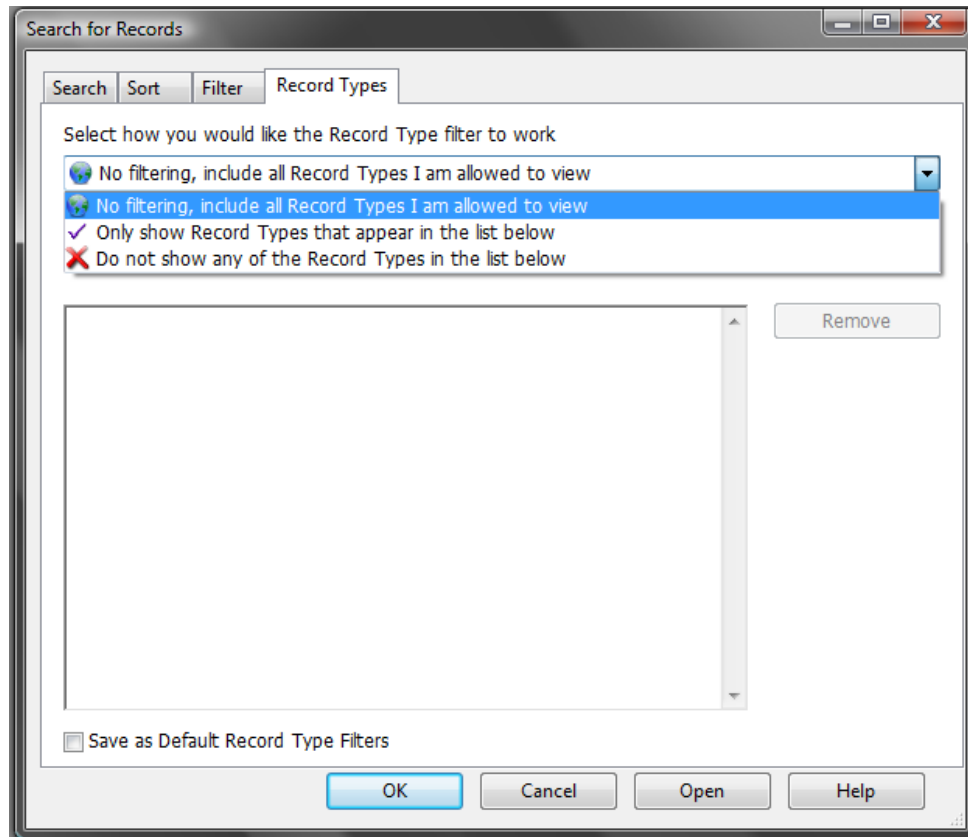


This document is a supplement to the TRIM guides and explains how to use the new Record Types tab in the Search for Records window. Searching in TRIM has always required users to select specific record types when searching. Previously this was done by tagging select record types from a given list or by right clicking and choosing an option to only tag every folder, box or document. Now you can choose between filtering options and build your own custom list of record types.

Initially you will select one of three options as below.



- **No filtering, include all Record Types I am allowed to view:** to include all record types (documents, folders and boxes), both record types related to your business unit and all other types to which you have access. This is suitable for very broad searches. Please note with this option the record types will not be displayed in the Record Types tab.
- **Only show Record Types that appear in the list below:** to build your own list of record types, adding those record types of interest from a list of all ministry document types, e-folder and p-folder record types, and ministry on-site destruction and off-site transfer box record types.
- **Do not show any of the Record Types in the list below:** to exclude specific record types. This is the inverse of option two.

Most users will likely select option two for everyday TRIM work in their business unit to focus on just the record types relating to their unit. Please note that the right click tagging functionality is no longer available.

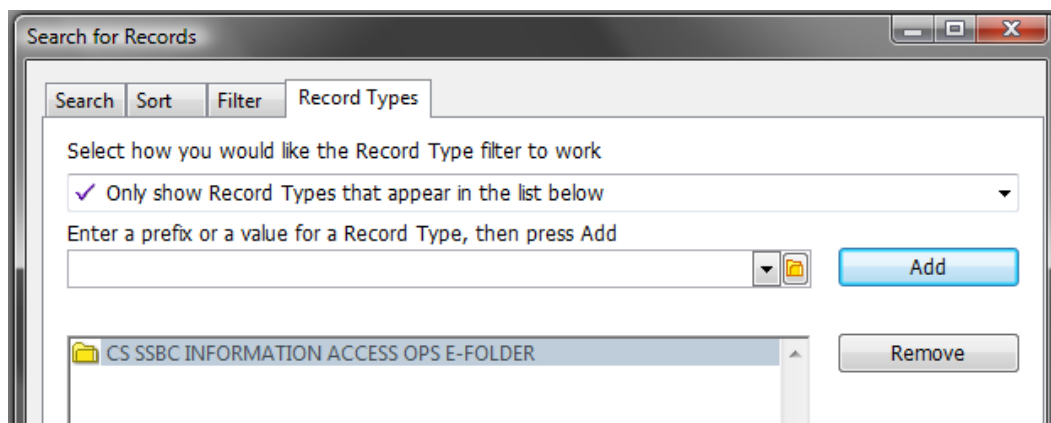
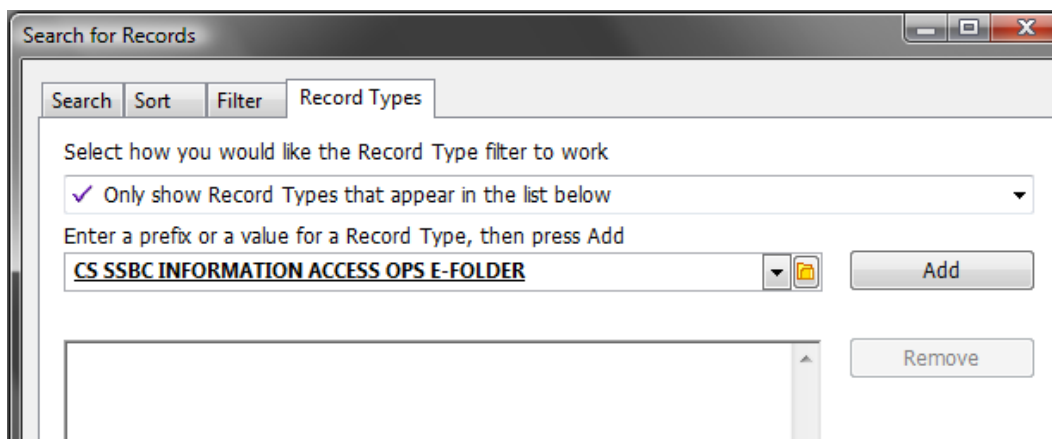
The following instructions concern **option two** for building a custom list of record types.

### Only show Record Types that appear in the list below

To add record types to the list, you can enter the full or partial record type name into the search field and click on Add or leave the search field blank and click on Add.

**Entering the full correct record type name** in the search field will directly add the record type to the list when clicking on Add. A correct name will display as **underscored and bolded**.

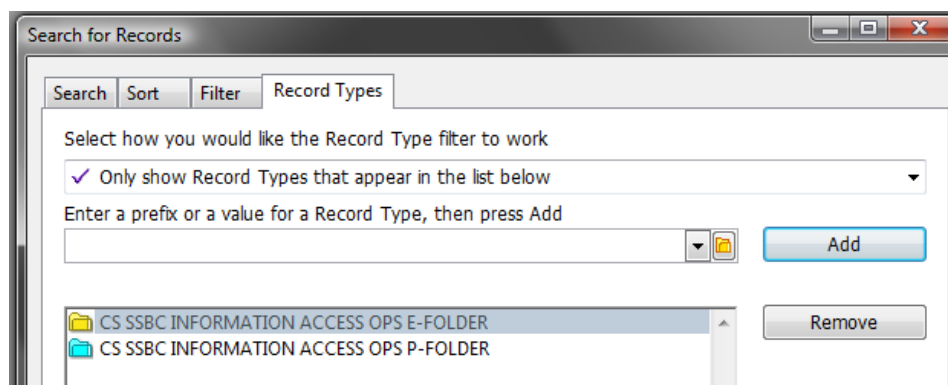
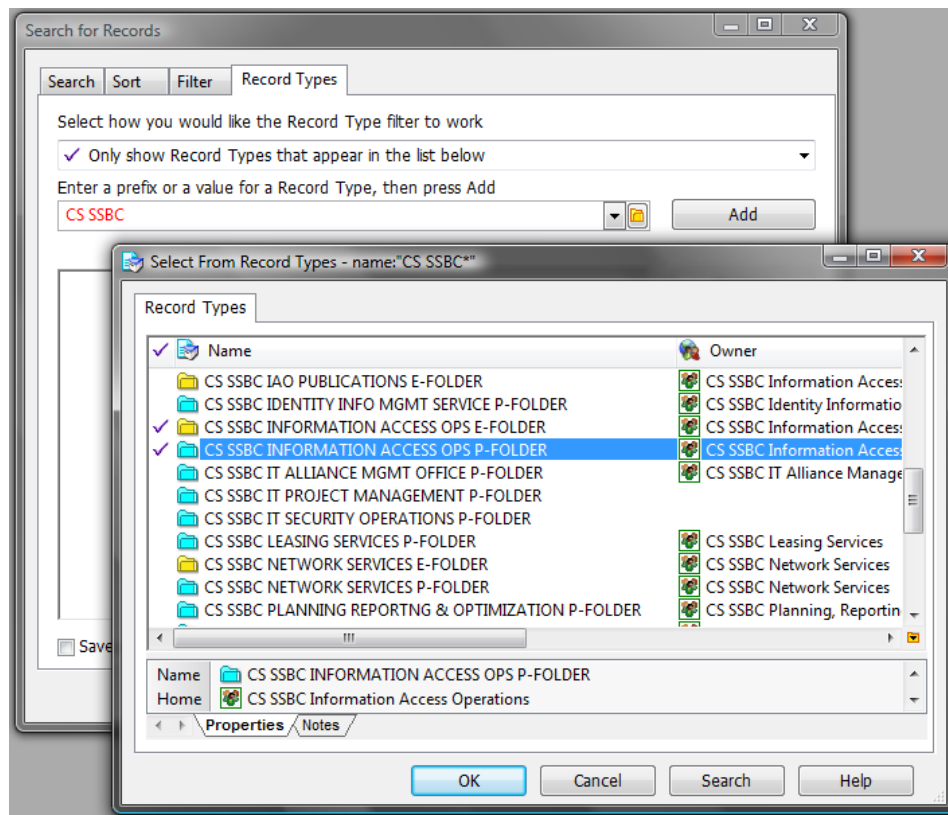
ENTER THE FULL RECORD TYPE NAME | ADD



# EDRMS TRIM Tip Filtering searches by Record Type

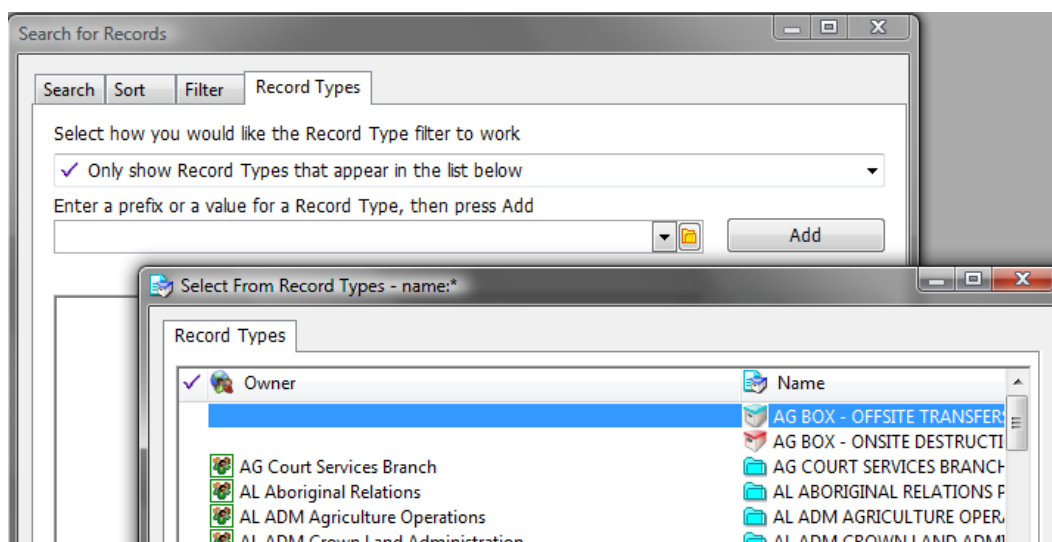
Entering the beginning of a record type name in the search field and clicking on Add will return a list of all record types which match the search value. A partial name will **display as red**. From the list of matching record types, you can tag record types and then click OK to add them to the custom list.

ENTER SEARCH VALUE | ADD | TAG RECORD TYPE(S) | OK



**Leaving the search field blank** will return a list of all record types when clicking on Add. You can then search the list of all record types by a combination of scrolling, searching, and sorting. From the list of all record types, users can tag the desired record types and then click OK to add them to the custom list.

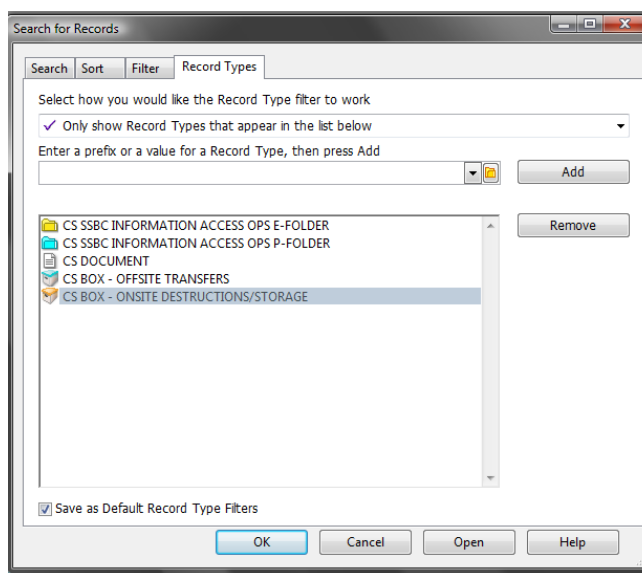
NO SEARCH VALUE | ADD | TAG RECORD TYPE(S) | OK



**Hint:** All record type names will be displayed in the Select From Record Types window. However, if you add to your search record types that you *do not* have permission to view, your TRIM search speed will degrade substantially. It is therefore imperative that you pick your record types *carefully*.

## Setting a default list

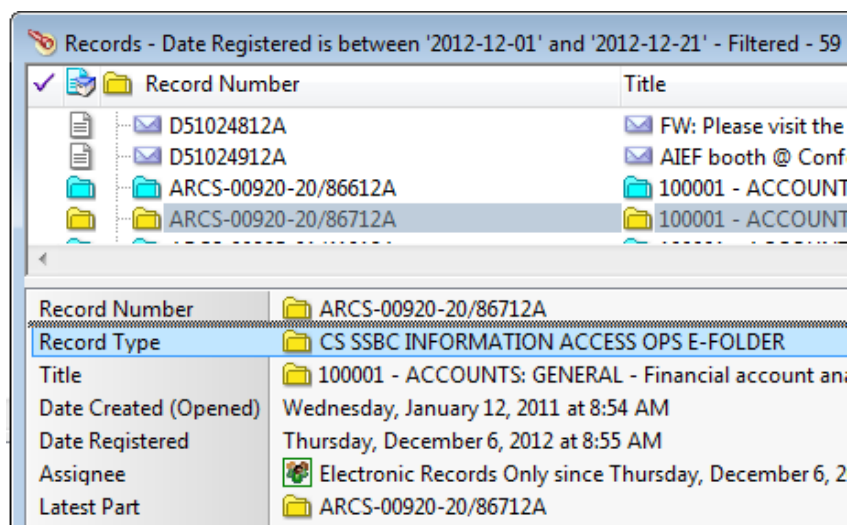
Once the record types list has been created, users can set their default list by checking the default box titled Save as Default Record Type Filters. You must click OK and run a search to save the default setting. The list can be changed anytime by using add and remove buttons. The default can be changed anytime by checking the default box and running a search.



The above example, in order of display, will include all e-folders and p-folders for a particular division, the electronic documents as designated by the ministry document type, and all transfer and destruction boxes. This is a typical default list for business units using TRIM to manage both electronic and physical records. Starting with this default selection, a TRIM user could remove record types for individual searches to narrow the filter but leave the default setting unchanged. For example, to search for just e-folders and documents, the user would first remove the p-folder record type and box record types, and then run the search. Subsequent searches will start off again with the full list of default record types.

## Finding your record types

If you are unsure of the record types for your business unit you can always ask EDRMS Help for assistance. Browsing through all record types is also a useful exercise to not only find the record types for your business unit, but also to increase your organizational awareness of how TRIM is set up and used by other branches and divisions within your ministry. Record type names can also be displayed as a field in the View Pane as shown below.



In summary, when selecting to “Only show Record Types that appear in the list below”, you can add record types to your custom list in the following ways and set any selection as your default.

- ENTER THE FULL RECORD TYPE NAME | ADD
- ENTER SEARCH VALUE | ADD | TAG RECORD TYPE(S) | OK
- NO SEARCH VALUE | ADD | TAG RECORD TYPE(S) | OK