

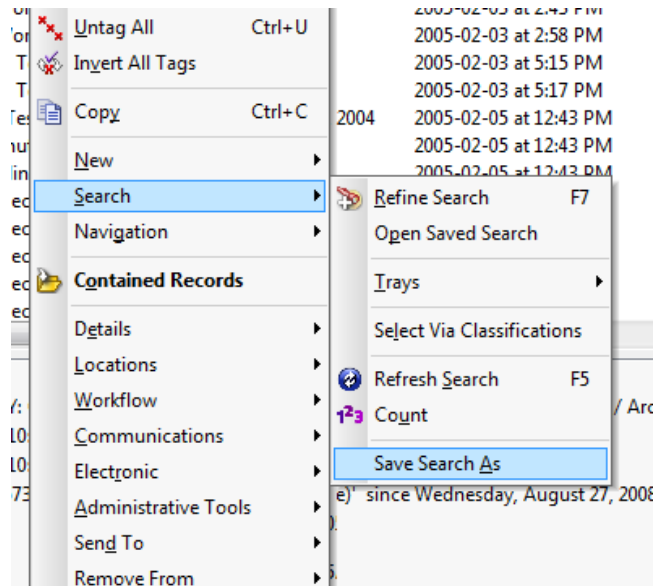
EDRMS TRIM Tip Save your Search

Primary Audience: Information Workers

Saving a search you plan to run again in the future.

To Save a search:

- Conduct your search.
- Then save it by right clicking and selecting Search / Save Search As



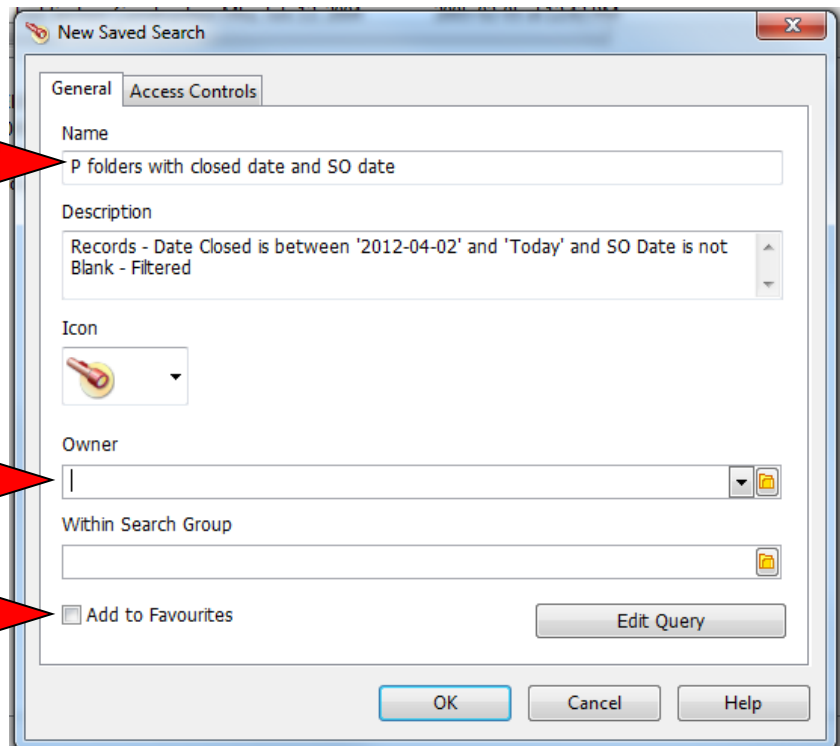
Give your search a meaningful name. Don't use dashes (-).



Your name will appear in the "Owner" field; remove it if you wish to share the search with others.



Add search to your "favourites" for convenience.

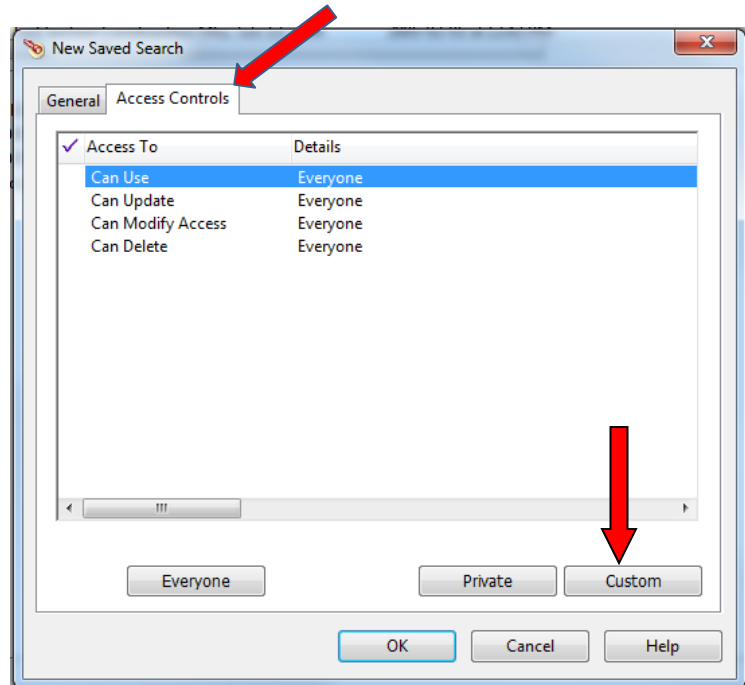


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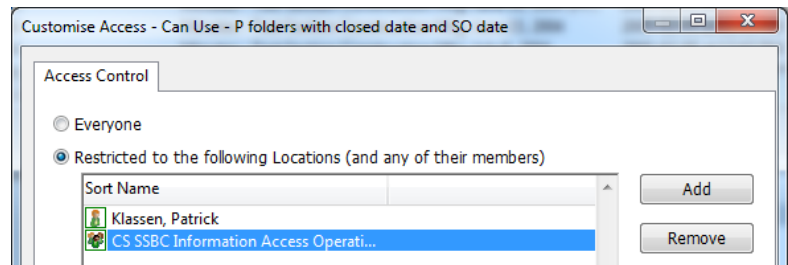
Select the Access Controls tab.

Do you want to let co-workers use the search?

- Tag Can Use. Select the “Custom” button on the lower right of Access Controls tab page.
- Select the “Restricted to...” button, then “Add” the branch or group needed.
- Select OK. You will find that “Can Use” has changed from the default of “Everyone” to your branch.
- It is recommended that you set Update, Modify & Delete to yourself only, otherwise others can remove or change your search.



If you want to make the search just for your use, then just put your name in the Access controls.



If you leave the Access Controls at the default of “Everyone” the every TRIM user across government can view it.

Find your saved searches in your “Favourites” or click on Search > Saved Record Searches in the TRIM menu bar.

