

ERMS 2019 upgrade

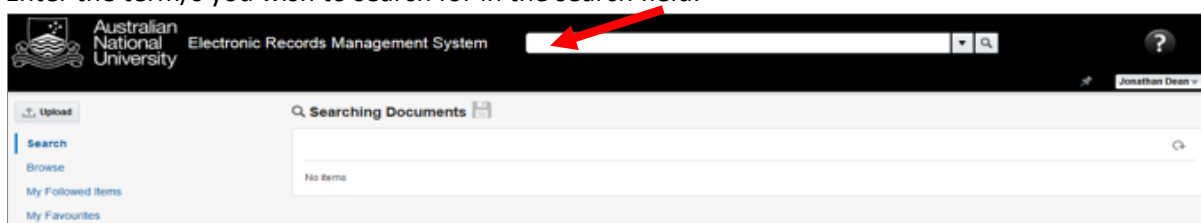
New ways to search

With the upgrade of ERMS (Electronic Records Management System), new ways to search for records are now available.

You can continue to perform basic (simple) text searches for records, or use wildcards, operators and filters to achieve more precise results.

To search for records in ERMS:

1. Click on Search (left side of window).
2. Enter the term/s you wish to search for in the search field.



3. Click on the Search icon at the end of the search bar or press “enter” on your keyboard.



4. The folders and documents which match the search term(s) used will be displayed.



Basic search terms

Searches in ERMS will query all records (documents), folders and libraries to which you have access. Search terms are not case sensitive, and single or multiple word searches are supported (e.g. searching for “report” or “draft strategic report”).

Search term operators

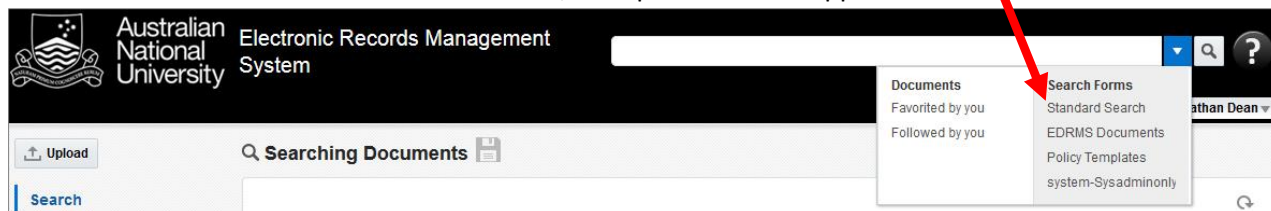
Enter your search terms in the search field separated by “AND”, “OR” and/or “NOT” operators to find results of various combinations (e.g. “strategic budget AND Australian NOT British”).

Note: operator terms must be entered in caps to be effective.

Wildcard searches can be run on individual terms, using the “?” operator to replace a single character, and “*” to replace zero or more characters (e.g. searching for “str?tegic budget*”).

Using the standard search form

Click on the arrow icon next to the search field, a drop-down menu appears.



Click on the Standard Search option to see a menu of search options which can be applied in any combination (e.g. all records filed by a specific ERMS user, within a specified time frame and/or containing desired search terms).

Search result filtering

Filters can be used in combination with text entered into the search box to further refine ERMS searches.

Filter options are displayed below the main menu (left side of window).

To apply a filter, click on the checkbox next to the desired filter option. Results applying the new filters will be displayed.

Filters include:

- > **Date Range** — click on the calendar/clock icon to choose a date or a specific date range
- > **Record Type** — document (file), folders, libraries, emails, physical documents, etc
- > **Security Groups**
- > **Creator / Filer**— refine results according to users who created, uploaded and/or edited certain documents
- > **File extension** – refine results by file type (e.g. Excel, Word, email message, etc)
- > **Search for** – allows you to narrow the search to only documents or folders