TRIAL INTERACTIVE

APPLICABLE TO:

- ● Administrators
- ● Room Managers
- ● Editors
- ● Readers

- ● eTMF
- ● Study Start-Up
- ● Collaborate

1. From any location in TI, open the **Search** function using the button located near the top-right of the screen.

Simple Search

2a. For a simple search, enter keywords directly in the search bar, then hit **Search**. You may set your search context using the buttons underneath the search bar.
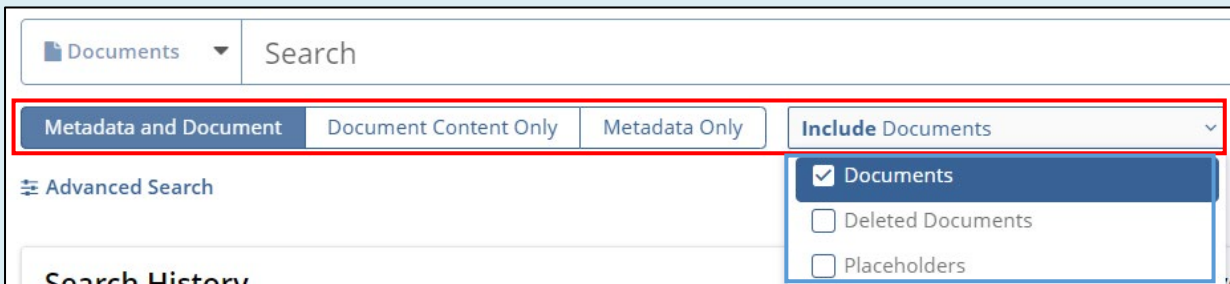
> While examples in this guide are based on a document search, you may be able to search for Queries, Sites, and Users – this is subject to user access level restrictions.

2b. The grid area will populate with documents that match the search keyword(s). You can refine search results using the filters located on the left side of the interface.
You can also use **Advanced Search**-like fields.
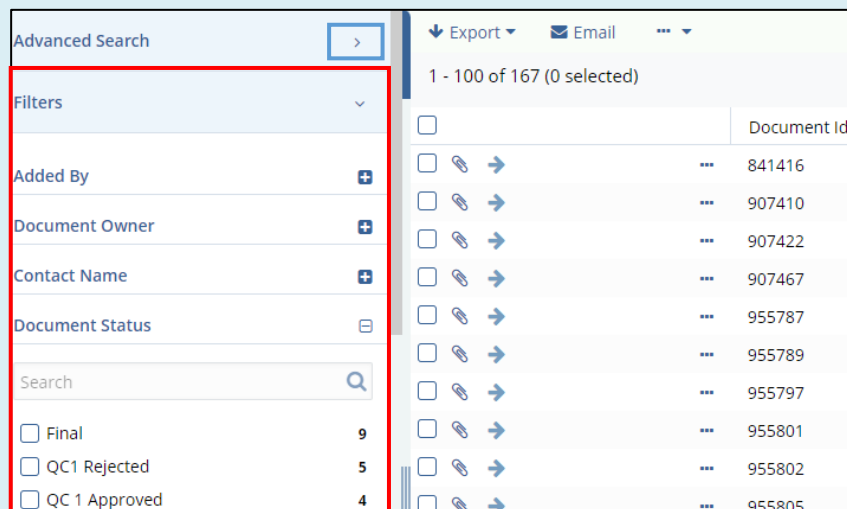
Advanced Search

3a. Use the **Advanced Search** button located under the search bar if you wish to set additional criteria for your search.

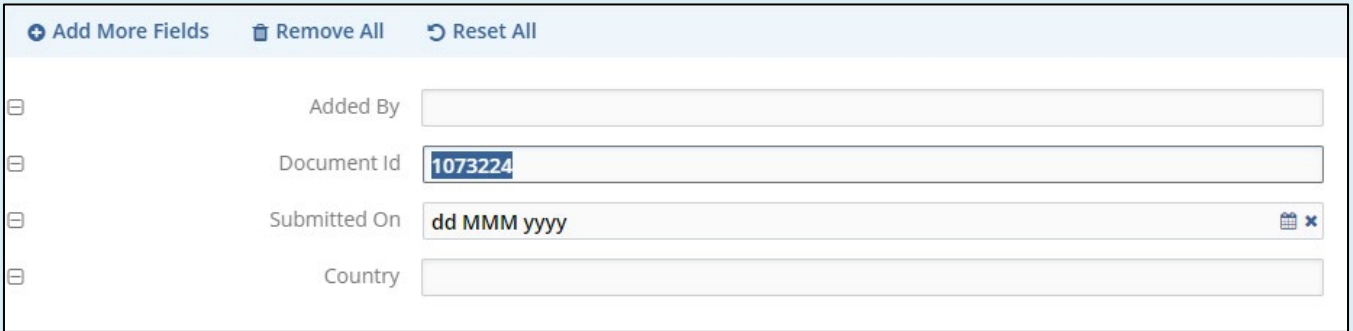Pro Tip: Advanced Search does not require entering keywords in the search bar.

3b. Use **Add More Fields** to enable criteria (specific metadata fields) by which the search will be performed. Make your selection from the dialog box, then click **Save**.

3c. Fill in the criteria with keywords, then click **Search (**at the top right). Search will look for any <u>partial</u> match.

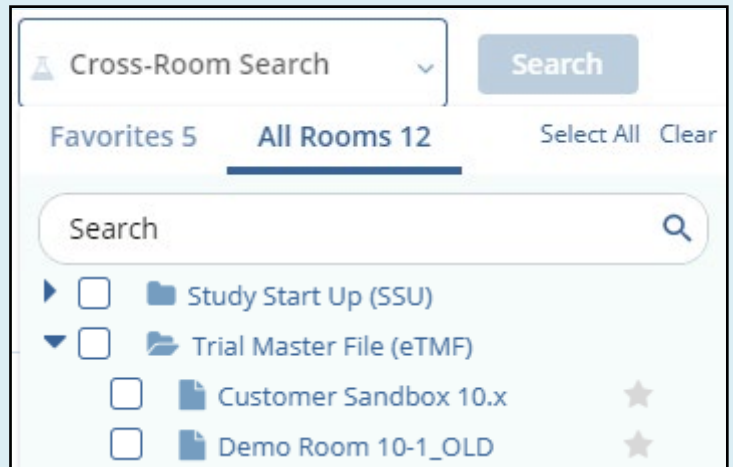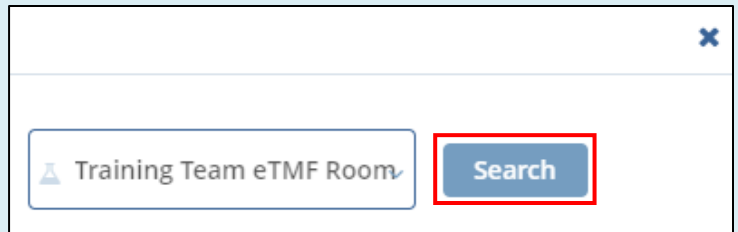| Add More Fields	Remove All	Reset All	
Added By			
Document Id	1073224		
Submitted On	dd MMM yyyy		
Country			

If using multiple fields here, search will return results that match all of the fields (logical "AND").

Training Team eTMF Room | **Search**

You can perform cross-room searches or look into other rooms you have access to, by using the room selector located next to the search bar. You can select multiple rooms at once.

Cross-Room Search | **Search**

Favorites 5   All Rooms 12   Select All   Clear
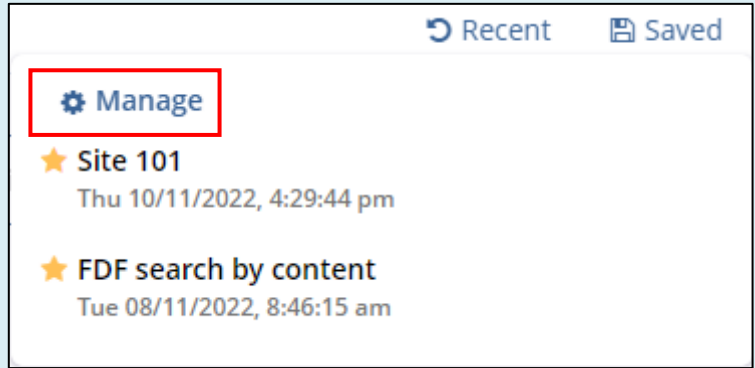
Search

▶ ☐ 📁 Study Start Up (SSU)
▼ ☐ 📂 Trial Master File (eTMF)
   ☐ 📄 Customer Sandbox 10.x ⭐
     ☐ 📄 Demo Room 10-1_OLD ⭐

<u>General</u>

4. You can **Save** a search for future use anytime after launching it. Saving will include any currently selected filter.

Search   💾 Save Search

5. Access **Recent** and **Saved** searches from the top ribbon, near the *close window* 'x' button. The Saved searches drop-down also allows for access to the **Manage** searches interface. Click on it.
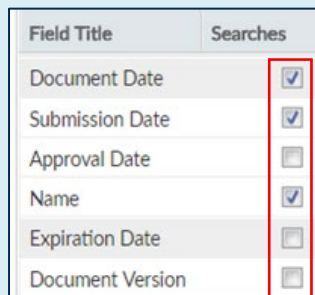

6. **Manage Saved Searches** allows you to favorite, share, edit previous searches, and more.
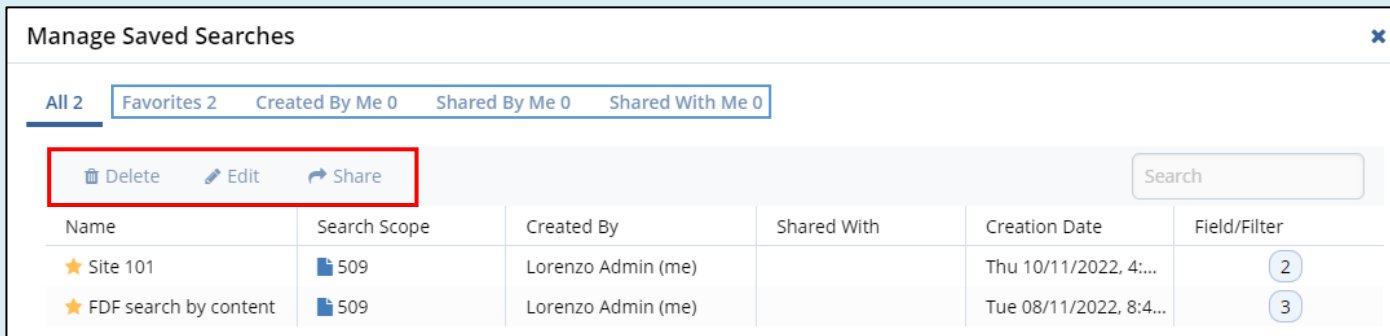
7. Admins have the ability to set which metadata fields are available for use in searches.
Open the **Forms Settings** menu in the **Settings** module and check boxes under the **Searches** column to enable specific fields.

Tips on Using Search

- Searches are NOT case-sensitive.

- Search will return results matching your input regardless of its location in text (beginning, middle, or ending of a word/multiple words).

- Use double quotes **" "** to look for an exact match. Example: **"Clinical Info".**

- Special characters and symbols are ignored by the search engine. ***Example:*** *searching for* **'medical@'** *will return the same results as a search for* **'medical'**.

- Some (but not all) Advanced Search fields support **Autocomplete**. Type the first 3 letters of an existing value and you will be able to click on its full name. Populating values in this manner will operate an exact match search.
  Adding multiple values will operate with logical "OR" unless an "AND" value is entered between the search terms.
  See figure below