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 restrict the search to document content or metadata only, using the buttons underneath the search bar
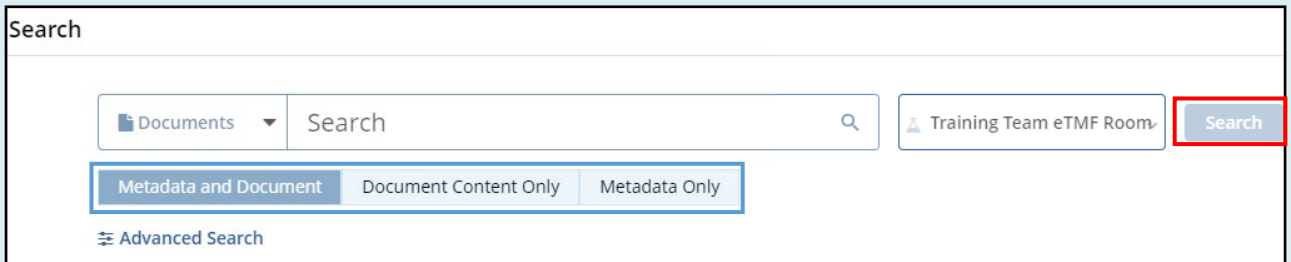
While examples in this guide are based on a document search, you may be able to search for Queries, Sites, and Users – this is subject to user access level restrictions.

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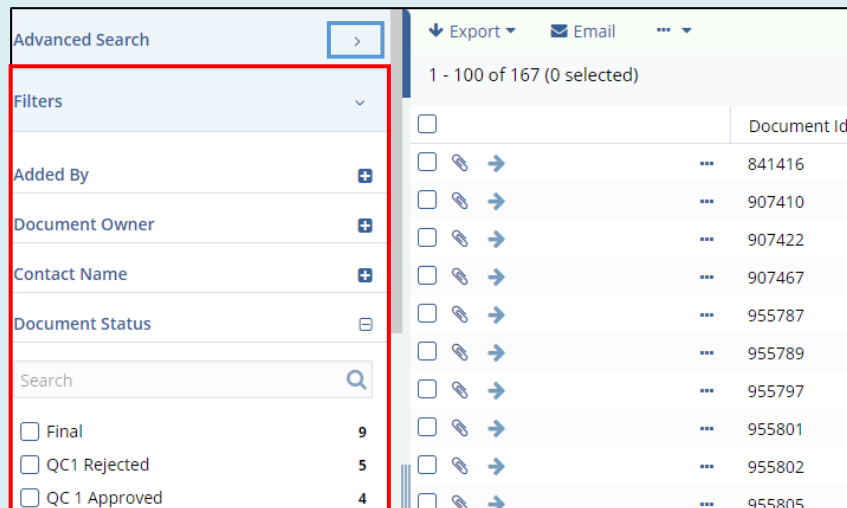
Advanced Search

3a. Use the **Advanced Search** button located under the search bar if you wish to set additional criteria for your search.
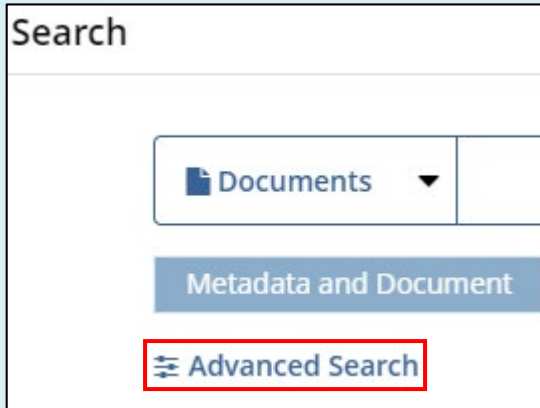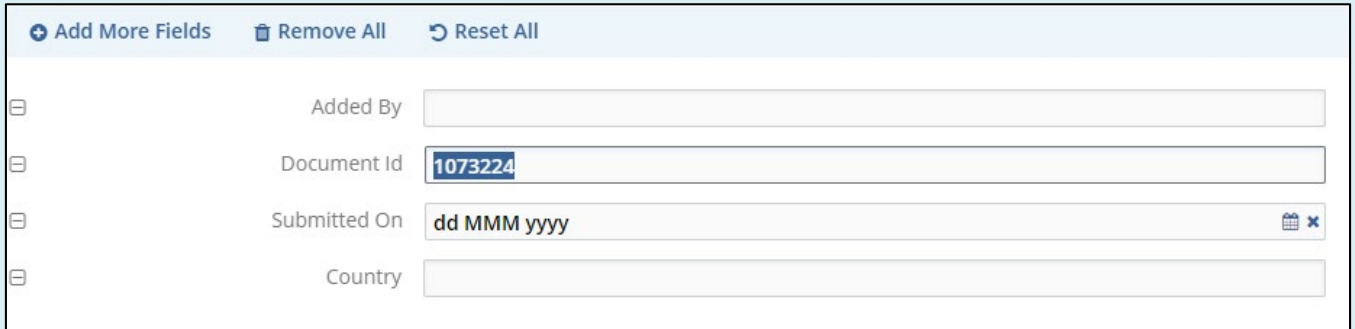
Pro Tip: Advanced Search does not require entering keywords in the search bar.

3b. Use **Add More Fields** to enable criteria by which the search will be performed. Select the ones you need from the dialog box, then click **Save**.
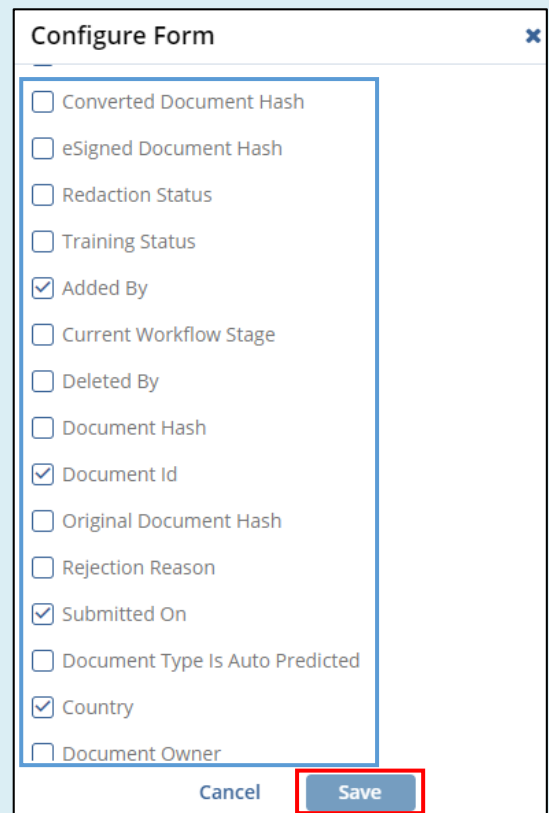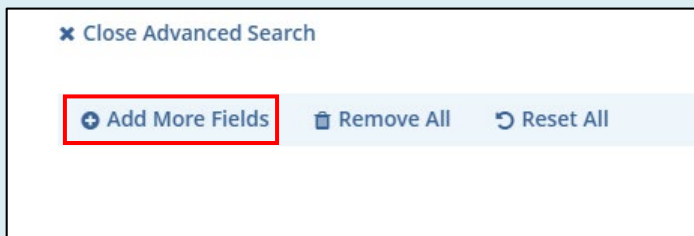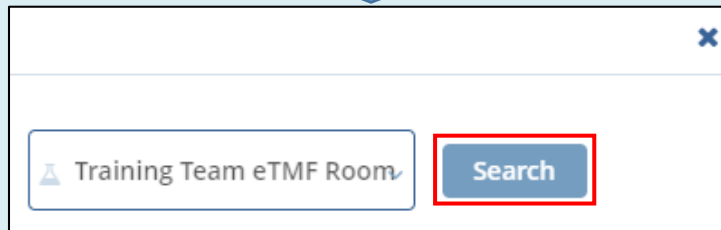
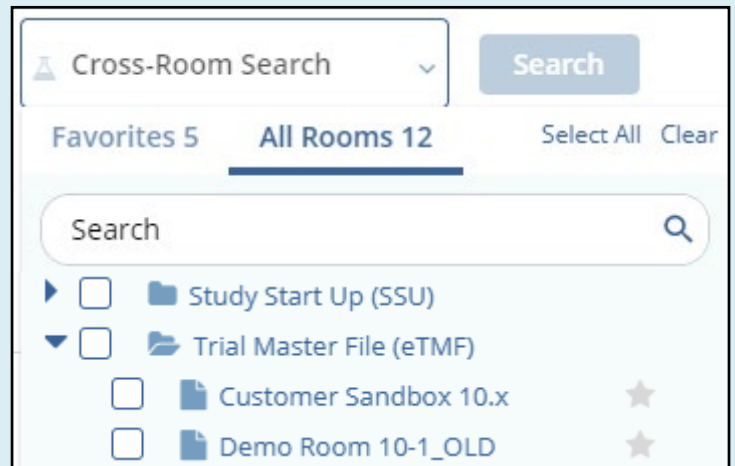**3c. Fill the criteria you need for the current search, then click Search at the top right.**

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.
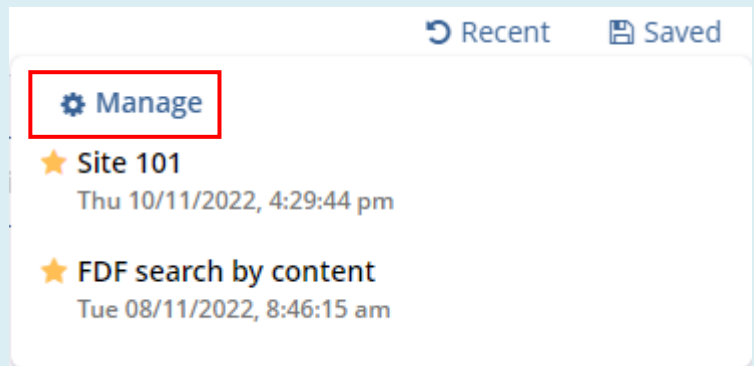

4. You can Save a search for future use anytime after launching it. Saving will include any currently selected filter.

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.
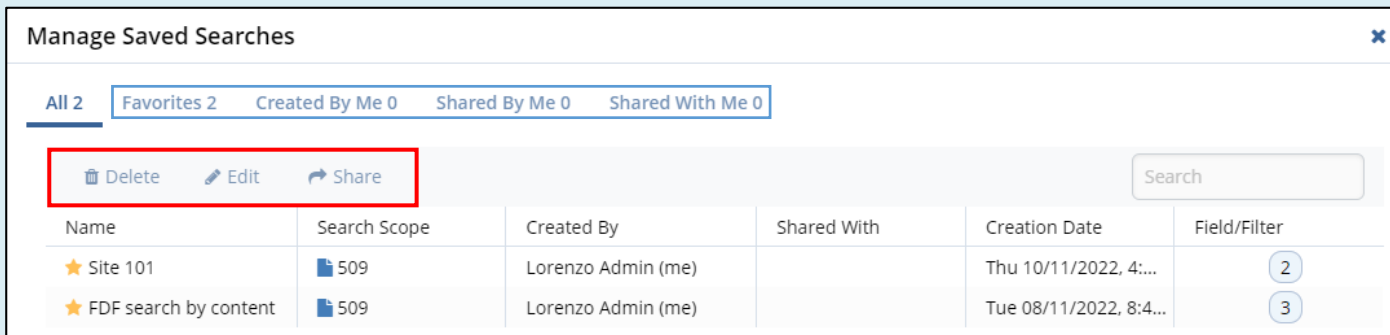
7. Admins have the ability to set which metadata fields are available for use in searches.
Open the **Forms Settings** menu in the **Settings** module and check boxes under the **Searches** column to enable specific fields.