

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.

Documents - Sea	arch			
Metadata and Document Document Content Only Metadata Only		Include Documents		
후 Advanced Search			🔽 Documents	
			Deleted Documents	
Search History			Placeholders	

While examples in this guide are based on a <u>document search</u>, 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	>	🕈 Export 👻 🖾 Email	••• •	
		1 - 100 of 167 (0 selected)		
Filters	~			Document Id
Added By	e			841416
				907410
Document Owner	0	- ⊗ →		907422
Contact Name	•			907467
Document Status	⊟			955787
		- ⊗ →		955789
Search	Q			955797
🗌 Final	9			955801
QC1 Rejected	5			955802
QC 1 Approved	4			955805

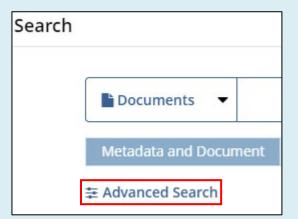


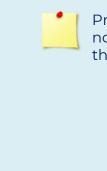
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Advanced Search

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

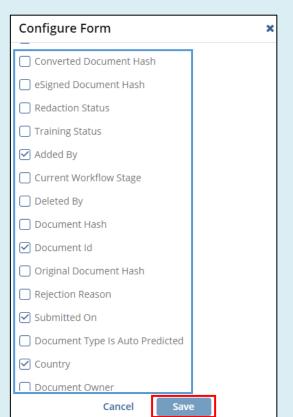




Pro Tip: Advanced Search does not require entering keywords in the search bar.

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**.





TRANSPERFECT

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T R I A L INTERACTIVE

How to Perform a Search TI v 10.5

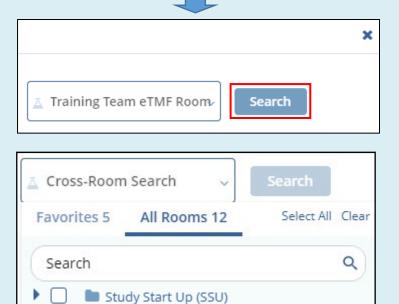
3c. Fill in the criteria with keywords, then click **Search (**at the top right). Search will look for any <u>partial</u> match.

• Add More Fields	1 Remove All	C Reset All	
8	Added By		
	Document Id	1073224	
Θ	Submitted On	dd MMM yyyy	≅ ×
Θ	Country		



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

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.



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.

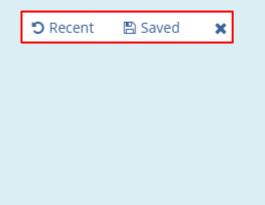


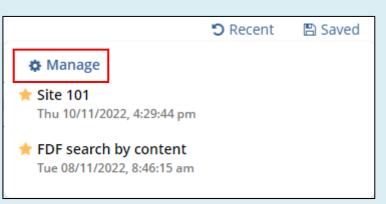




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5. Access **Recent** and **Saved** searches from the top ribbon, near the *close window* 'x' button. The Saved searches drop-down also allows for access to the **Manage** searches interface. Click on it.



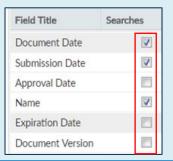


6. **Manage Saved Searches** allows you to favorite, share, edit previous searches, and more.

lanage Saved Searches					
II 2 Favorites 2 Crea	ated By Me 0 Share	ed By Me 0 Shared With M	1e 0		
🛍 Delete 🛛 🖋 Edit	Anare Share			Sea	rch
Name	Search Scope	Created By	Shared With	Creation Date	Field/Filter
★ Site 101	509	Lorenzo Admin (me)		Thu 10/11/2022, 4:	2
★ FDF search by content	509	Lorenzo Admin (me)		Tue 08/11/2022, 8:4	3

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.





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T R I A L INTERACTIVE

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

Search			
	Documents Search		
	Metadata and Document Document		Content Only Metadata Only Include Documents ~
	X Close Advanced Search		
	• Add More Fields	🛱 Remove All	ී Reset All
	8	Category	Exact OR Partial OR Partial General × gen ×
		Document type	DocType1\DocType1.1 × DocType1 ×doc × new ×
			new Partial +
			New Document Type Exact

