USER GUIDE TO SEARCHES AND FILTERS IN TRIAL INTERATIVE ROOMS V10.5

1. Introduction

To fully understand the Search Interface "Filters," it is important to be familiar with the Search Interface "Searches" as it is a direct dependency. So, let's take a look at each one separately:

- Searches
  - o The Search Interface "Searches" is a tool that enables users to search for Documents, Users, Sites, and Queries within a Room or across the Rooms they have access to by applying relevant metadata such as Document Name, Contact Name, Document Date, Document Status, etc. to these categories.

- Filters
  - o The Search Interface "Filters" is a tool that helps users refine their search results by applying filters based on any document metadata. This means that users can quickly and easily find the information they need by specifying the criteria that their search results must meet.

2.   Purpose of Searches and Filters

The "Searches" and "Filters" interfaces are designed to be user-friendly and efficient. They allow users to quickly and easily find the information they need.
- Searches allow users to perform two types of searches:
    - **Cross-study search:** This type of search allows users to search for documents across all rooms that they have access to
    - **Documents search (Within Room Search):** This search allows users to search for documents from within a room or study

Filters can be used to narrow down search results to only the most relevant information. For example, a user could search for all documents and then use filters to find the documents related to a specific topic or added by a particular user.

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3. Navigation

The process to execute both types of searches is the same except for the location:

Cross Room Search:

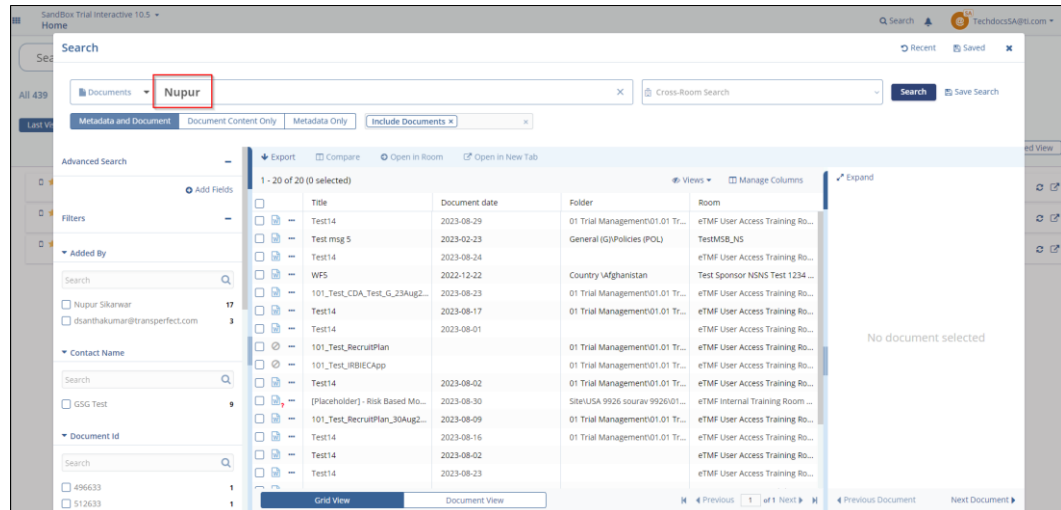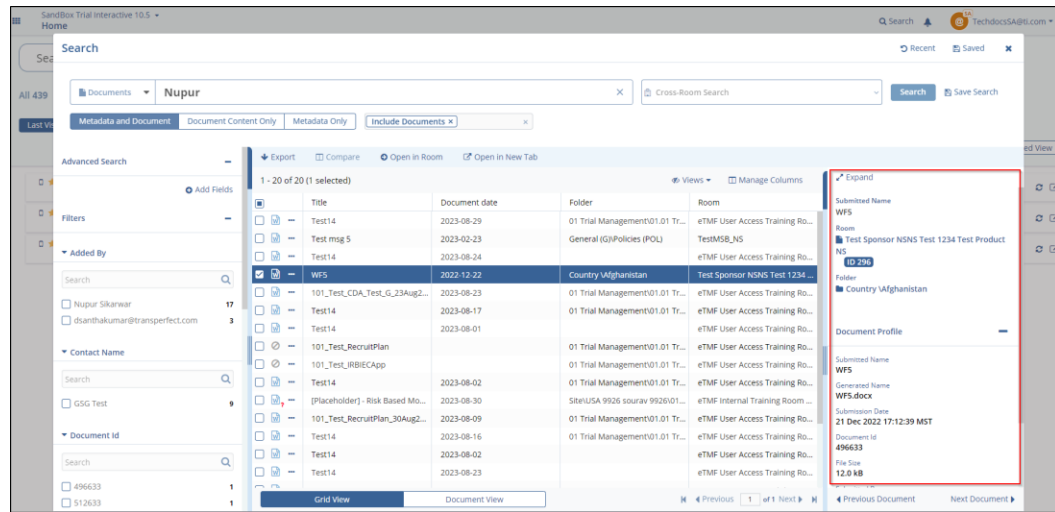1. TI Home Page > Click the Search Icon on the top right corner of the screen> Search Popup appears.
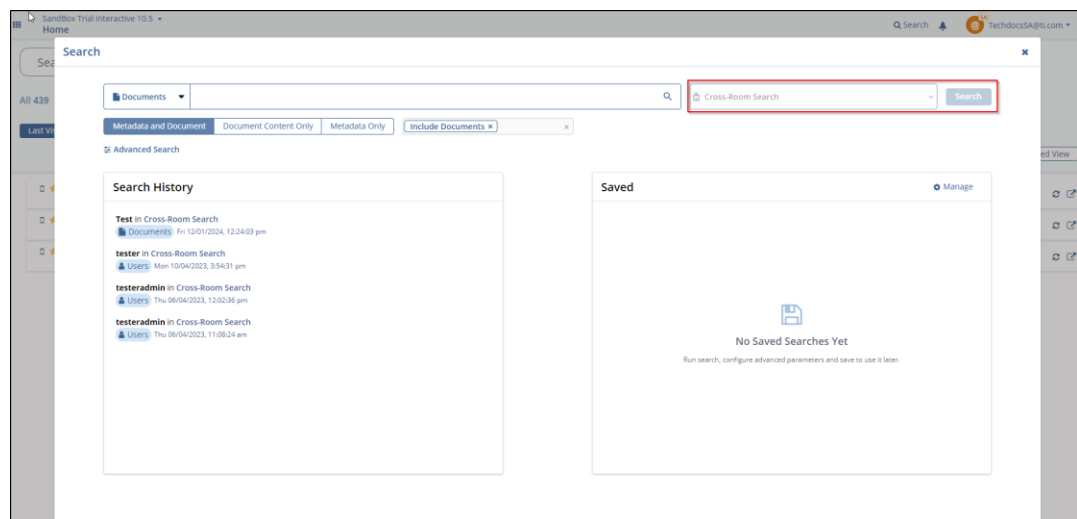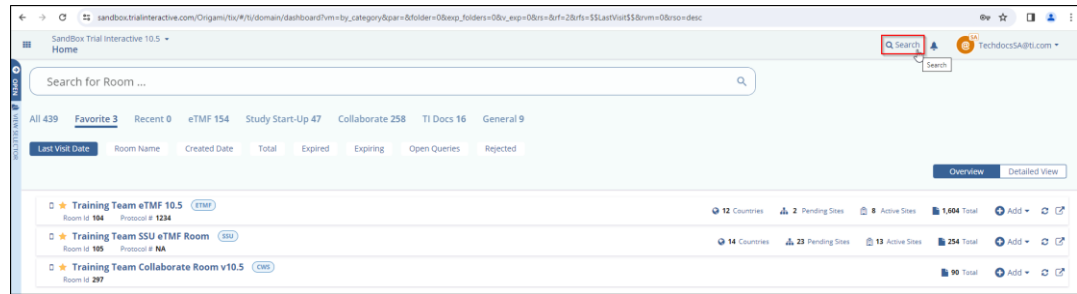
2. Select the requirement from the drop-down options and enter the search criteria in the Search box, as soon as the text is entered in the Search box, the search process starts, Items matching the search criteria are displayed in the Grid below the Search box or else a message No records available is displayed. Refer to the screenshot below:
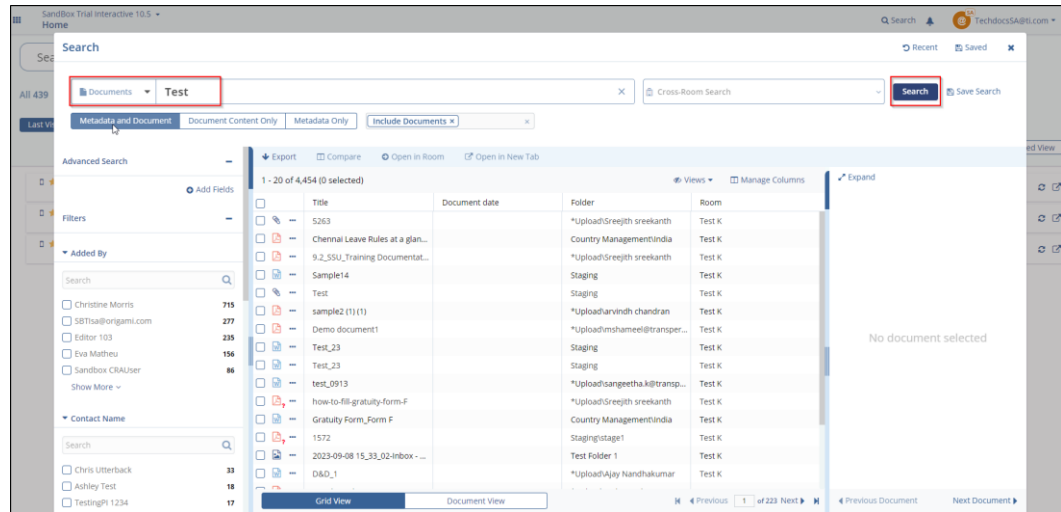
1. Hover the mouse over the Document icon to get a preview of the documents, click the document icon. The Document Metadata Panel Opens in the right pane.
2. Similarly, select the other options to perform a search. When the results are displayed and the user selects any record, User Details are displayed in the right pane.

Within Room Search: Enter the desired Room > Click the Search Icon on the top right corner of the screen> Search Popup appears.

- Rest all steps for searching remain the same as described for Cross Room Search.
- In both cases either search can be performed within all the Rooms the user has access to OR the number of Rooms can be selected within which the user wishes to perform the search:
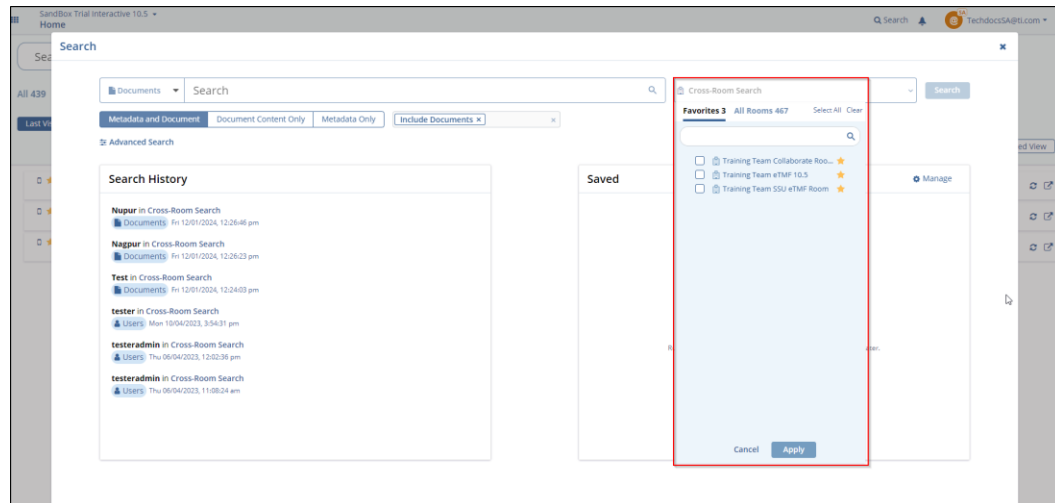
- Here are more examples of how users can use the Searches and Filters interfaces with Advance Search:
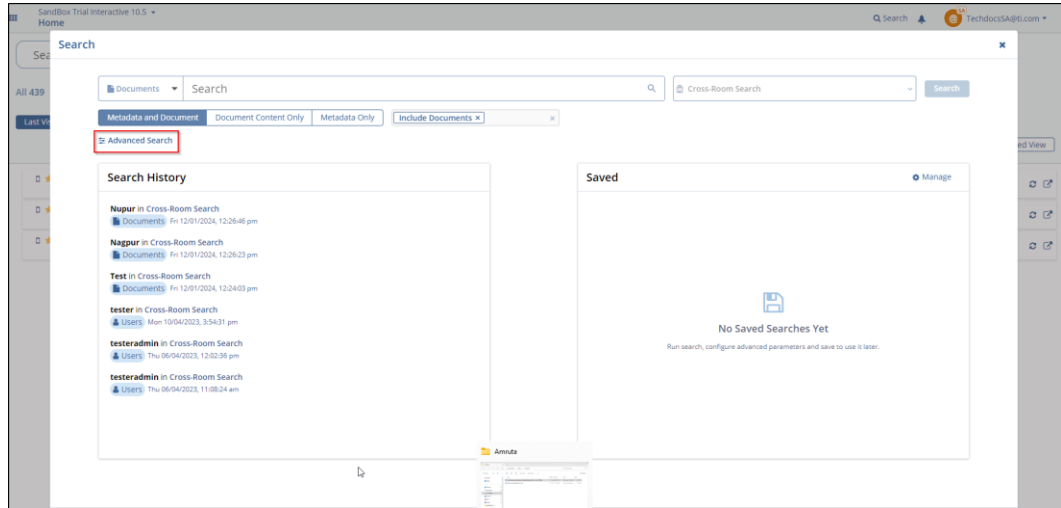
1. Click on Advance Search > Add More Fields > Advance Search- Add Fields pop-up will appear. A user who is working on multiple studies can use this Cross-study search to find all documents added in a Room by a particular Document Submitter by using Metadata "Added by".
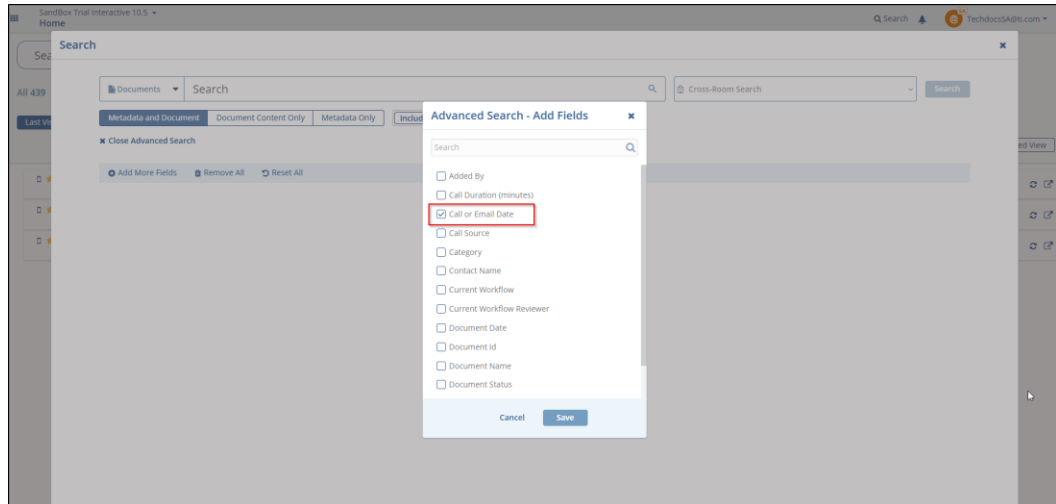
2. Search by Submitter name, this is how searches help users.
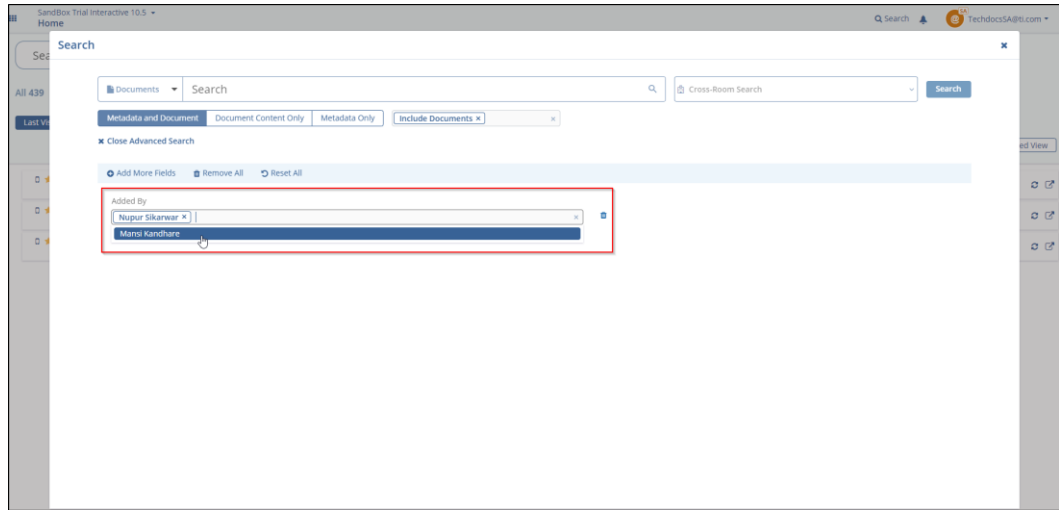
3. When it comes to applying "Filters" to these searches, users get more refined results: For example when the user gets details of documents added by particular users, further filters can be applied like "Document type", "Room name" etc.. which will help to know that the documents added by particular user were added to which doc type and to which Room.
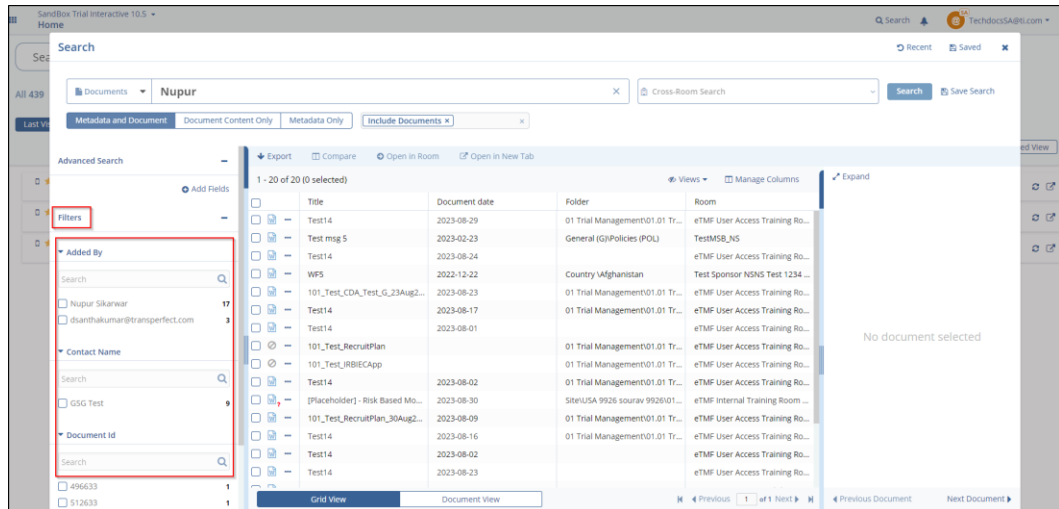
4.   Configuration

How to configure Metadata to be available for "Searches" and "Filters"?

- **Form Settings**: Go to TI Home Page > Click on Settings > From the drop-down Menu on Left Click Form Settings.
- Choose the required option from the drop-down menu:
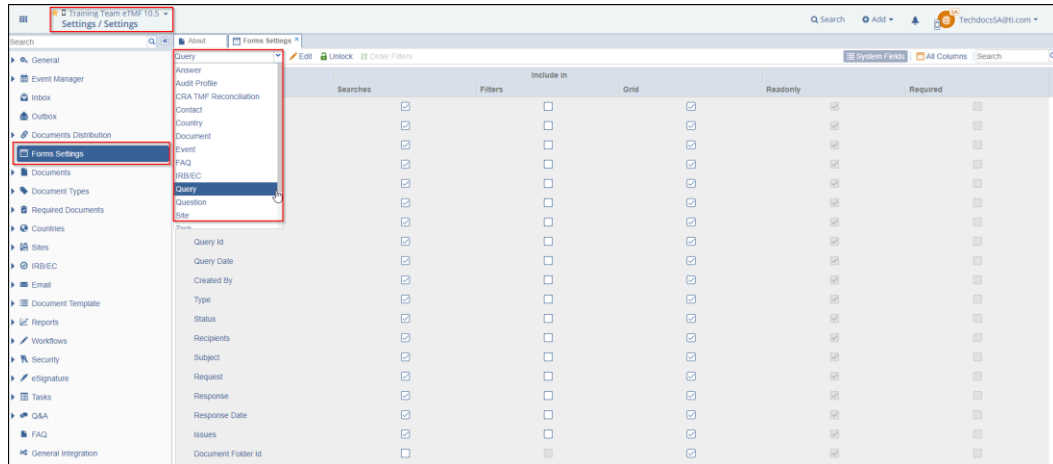
- All the related Metadata (Title) appears related to the dropdown selected and users can choose which Metadata they want to reflect for Searches and Filters:
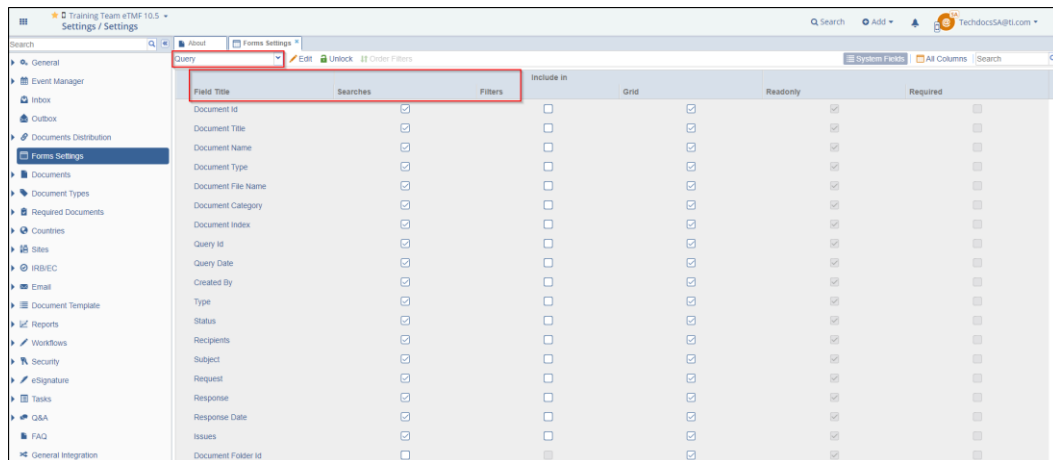
- Within Room Search: Enter Room > Go to Settings Module > From the drop-down Menu on Left Click Form Settings.
  - o   The rest Steps remain the same as explained for Form Search.

5. FAQ

Q. Do we need to enable "Searches" first to enable "Filters"
   Answer: Yes, as "Filters" is an interface that allows users to further refine their search and is completely dependent on the interface "Searches", the user will be able to enable "Filters" only when Searches" is enabled.

Q. Does any other Search Interface depend on "Searches or Filters"?
   Answer: No

Q. Which access level has access to Searches/Filters?
   Answer: Admin Users will have complete access to Searches and the rest of the Users will get limitations based on their roles, for example, Editors and Readers do not have access to search "Users" using "Searches".

Q. Can these be applied to both the System and Custom Metadata fields?
   Answer: Yes