Searching for Library Content

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From the Library dashboard, you can search for Line Items containing specific text or a particular value tagged as data. You can't search for a tag field. Click 'Filters' for filter options.

| Line Items Layout Guides O | | FILTERS Select one or more values to refine your search. | | × |
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Brokers can also filter the list of Layout Guides. Since layout guides contain much less metadata, the filter tab is simpler, but it works in the same way.

| yout Guides 0 | | | FILTERS Select one or more values to refine your search | |
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| e items o | | | CORE INFORMATION | |
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Clicking the 'Filters' button pulls up a list of all metadata fields. Select as many filter terms as you need from the extensive options, and click 'Apply Filters' to hide all non-matching items. You can clear existing filters via this tab as well.

| Select Option | | Select Contract/Te | mplate | (i) Ad | d Information | | Create |
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| Risk Name | Aviation | | Contract Type | UMR | Team | Owner | Inception Date |
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When importing multiple Line Items, or, for brokers, creating a Layout Guide, you are shown the platform contract records you can access. Filter the list by specifying details and clicking 'Search'. Filters can be cleared by clicking the 'x' at their end.

| Line Items Layout | Guides 0 | | FILTERS Select one or more values to refine your search. | | | | | |
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Click the 'Contract/Template Name' filter tab to list Platform documents that can be filtered or scrolled. Select a template/ contract to filter the Line Items to just those used in that document, either the most current version or the original Item.

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|-----|--|---------------------------------------|---|
| | Showing 116 (from 116) Line Items | Draft 1 | |
| | Risk Details | | 1 |
| | Broker Remuneration & Deductions | RISK DETAILS | |
| - I | Fiscal And Regulatory | ♦ UMR | ~ |
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| | 2 Signing Provisions | ATTACHING TO FACILITY CONTRACT NUMBER | ~ |
| | Subscription Agreement | Project Period | ~ |
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| | Placing Data | | |

When inserting content from the Library into a template or contract, you can search by text or tagged value in the Line Item, and/or click on and expand out categories to search manually. The 'Filters' button lets you filter the list.



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