

APPLICABLE TO:

Administrators

eTMF

Study Start-Up

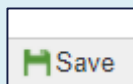
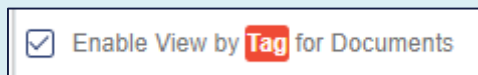
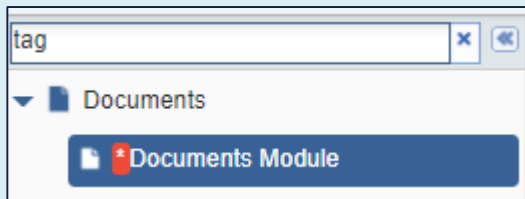
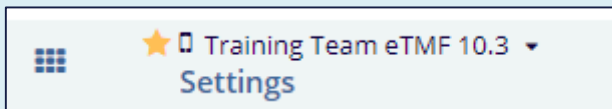
Collaborate

Users have the ability to tag documents with a particular word or phrase. These tags may then be used for filtering, sorting, and reporting. Multiple tags may be created for each record.

Note: The **Document Tag Feature** must be enabled within the **Settings** menu in order for the function to work.

The **Tags** field must also be added within the **Forms Settings** to ensure it's an included piece of metadata.

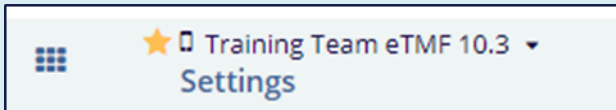
To Enable the **View by Tag for Documents** Option:



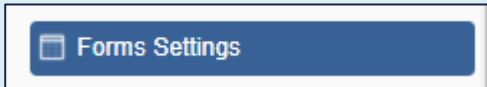
1. Open the **Settings** menu from the Navigation Grid
2. Search for “**Tag**” then select **Documents Module**
3. Click the box to **Enable View by Tag for Documents**
4. Click **Save** when finished

Document metadata supports tags as easy ways to tag, filter, search, and identify documents later for analysis or export.

To Add the Tags field in the Metadata Pane:



1. Open the **Settings** menu from the Navigation Grid



2. Click on **Forms Settings**



3. Click **System Fields** on the right and locate **Tags**

4. To ensure document tags are a part of the document metadata, select the **Coding** box. Users can also check the boxes next to **Searches** and **Grid** for additional sorting and filtering options.

Field Title	Searches	Coding	Workflow...	Workflow ...	Grid	Notification	Mass Cod...	Related F...	Suggesti...	Readonly	Required
Tags	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

5. Click **Save** once finished.

