

APPLICABLE TO:

- Administrators
- eTMF
- Managers
- Study Start-Up
- Editors
- Collaborate
- Readers



Document metadata now include tags as a convenient way to identify, filter, search, and group documents by means other than 'traditional metadata fields. Multiple tags may be associated to a single record.



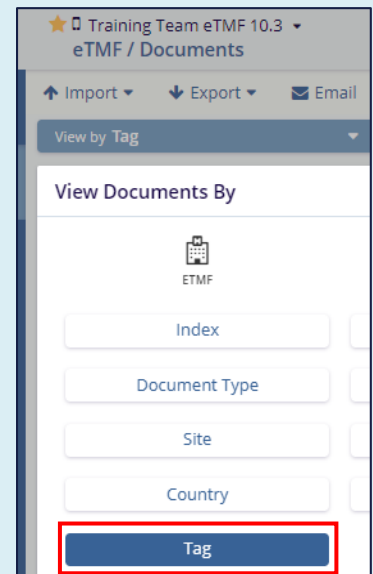
Important: The **Document Tag Feature** must be enabled within the Settings menu, and the **Tags** field enabled within Forms Settings in order for this function to work. Both can be done by a Room Admin.

See related job aid: **How to Enable the Document Tag Feature.**

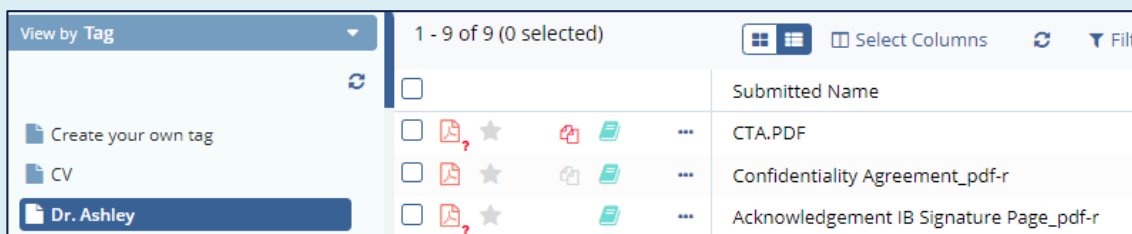
1. Login to a room and navigate to the **Documents Module.**



2. To view documents that already have tags associated to them, choose the **Tag** option in the **View by** selector.

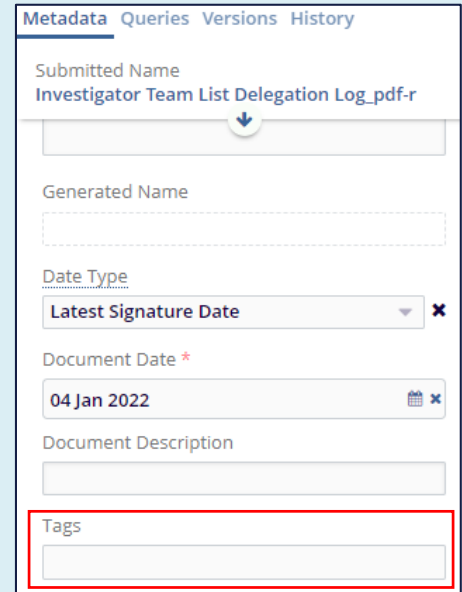


3. Existing tags will display on the left as folders. Click one to see the documents that are currently associated with that tag.



To apply Tags to documents:

1. Locate the **Tags** field within the **Metadata Pane**.
2. Click on the **Tags** field to display a list of existing Tags. Users can choose multiple tags to apply to the same document.



Metadata Queries Versions History

Submitted Name
Investigator Team List Delegation Log.pdf-r

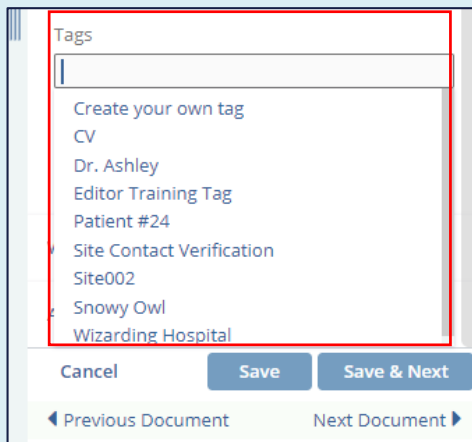
Generated Name

Date Type
Latest Signature Date x

Document Date *
04 Jan 2022 x

Document Description

Tags



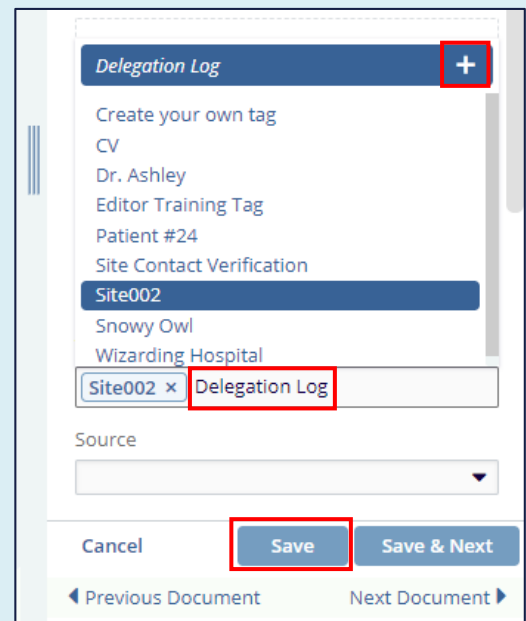
Tags

- Create your own tag
- CV
- Dr. Ashley
- Editor Training Tag
- Patient #24
- Site Contact Verification
- Site002
- Snowy Owl
- Wizarding Hospital

Cancel Save Save & Next

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3. To create a new Tag, just start typing into the current field, then click the + button on the right.
4. Once finished, click **Save** to update the Document Profile.



Delegation Log +

- Create your own tag
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Site002 x Delegation Log

Source

Cancel Save Save & Next

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