


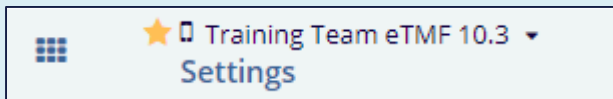
APPLICABLE TO:

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

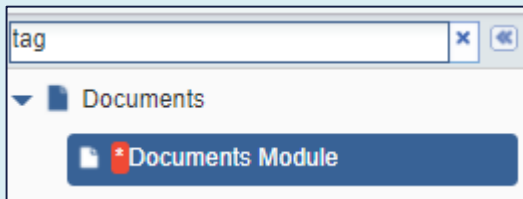
Users have the ability to ‘tag’ documents with a specific word or short sentence. Such tags may then be used for filtering, sorting, and reporting. Multiple tags may be created for each record.

 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 available to users among metadata fields.

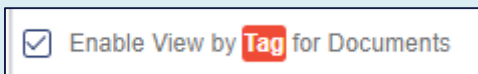
To Enable the **View by Tag for Documents** Option:



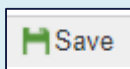
1. Open the **Settings** menu from the Navigation Grid



2. Search for “**Tag**” then select **Documents Module**



3. Click the box to **Enable View by Tag for Documents**

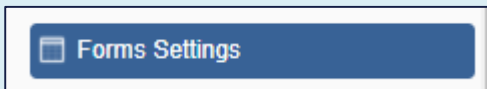


4. Click **Save** when finished.

To Add the **Tags** field in the **Metadata Pane**:



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



2. Click on **Forms Settings**



3. Switch to **System Fields** and locate **Tags**.



4. Select the **Coding** checkbox. This ensures document tags are a part of documents metadata. 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** to finish this process.

