How To Use the Document Tag Feature

TI version 10.7
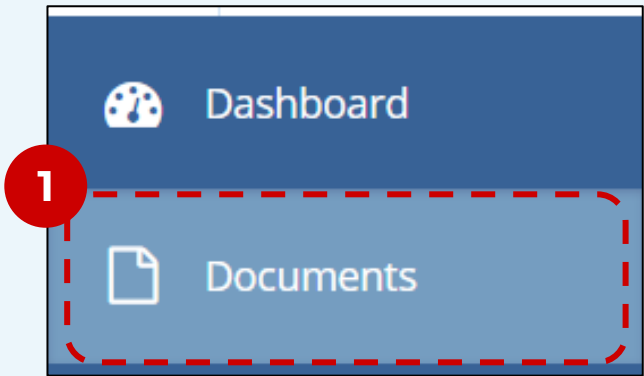
TRIAL INTERACTIVE

APPLICABLE TO:

- ● Admin
- ● Manager
- ● Editor
- ○ Reader

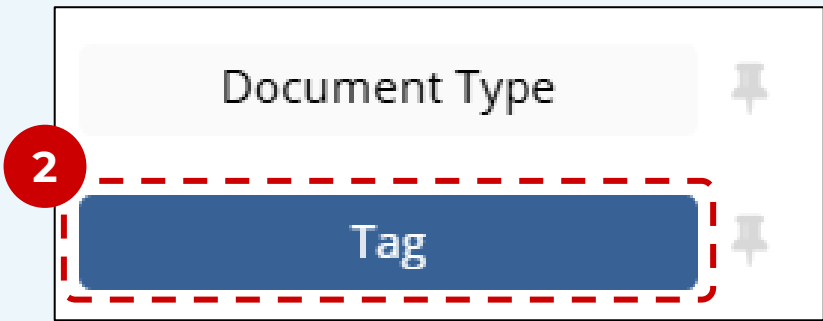- ● eTMF
- ● Collaborate / eISF

Documents tags can be enabled in study rooms to provide an alternative way to identify, filter, search, and group documents by means other than 'traditional' metadata fields.
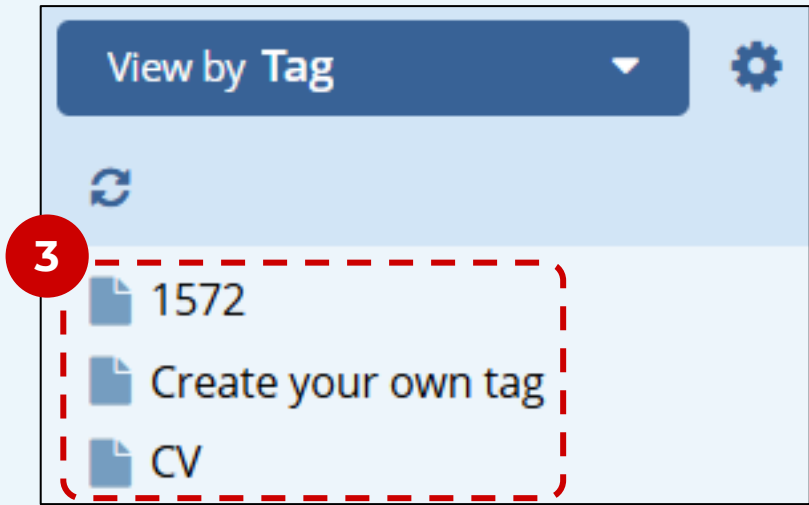
To View Tags

1 Navigate to the **Documents** module.
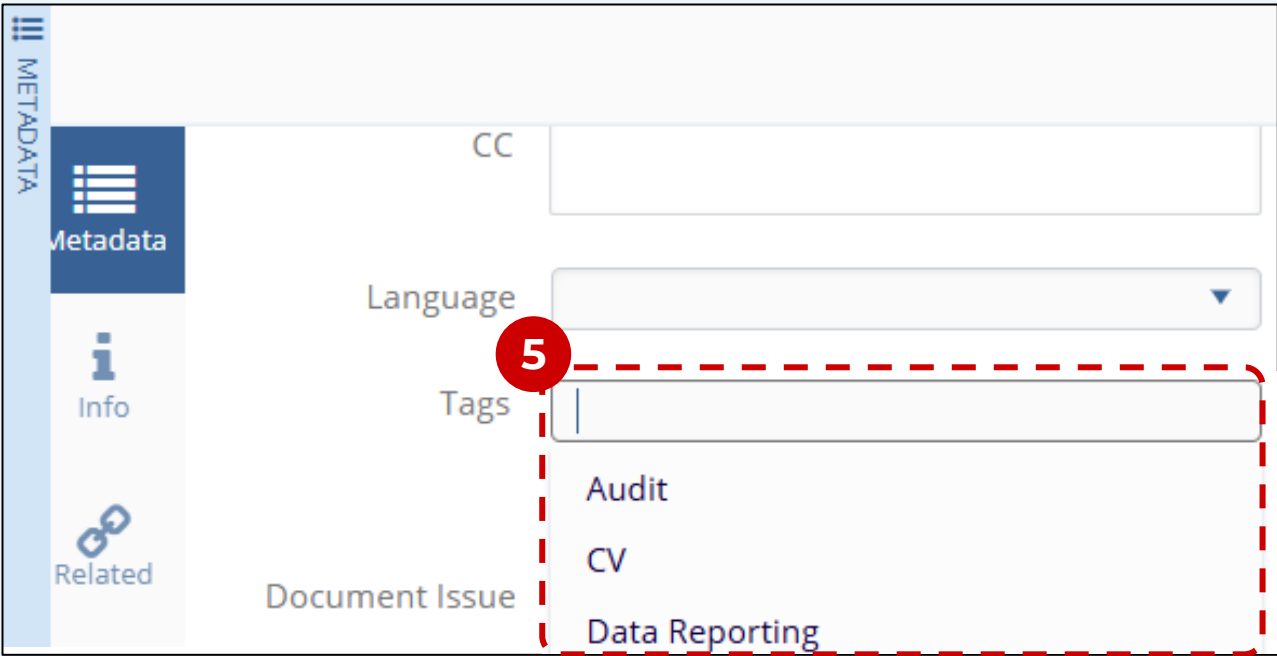

2 Select the **Tag** documents view.

3 Existing tags will display as folders. Click one to see a list of documents that are currently associated with that tag.
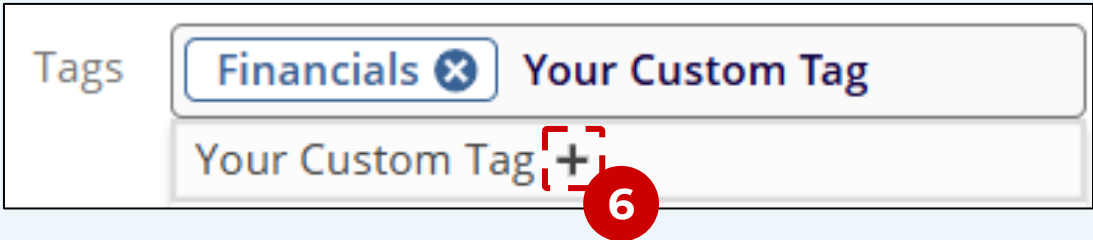
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To Assign Tags

4 Select a document and expand the metadata panel.

5 Locate the **Tags** field (location may vary), and start typing or select one of the existing options.

6 You may add new tags simply by typing, then clicking the **'plus'** button.

7 For the changes to take effect, do not forget to click on the **Save** or **Save&Next** buttons at the bottom of the panel.