

### APPLICABLE TO:

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

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

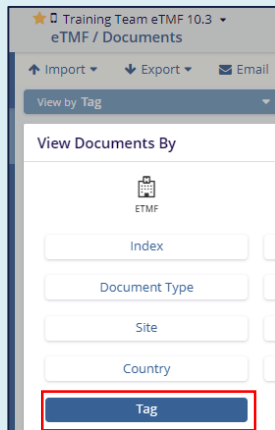
Multiple tags may be created for each record.

**Note:** The **Document Tag Feature** must be enabled within the Settings menu and the **Tags** field must also be added within the Forms Settings to ensure it's an included piece of metadata in order for this function to work.

These must be enabled by Room Admins

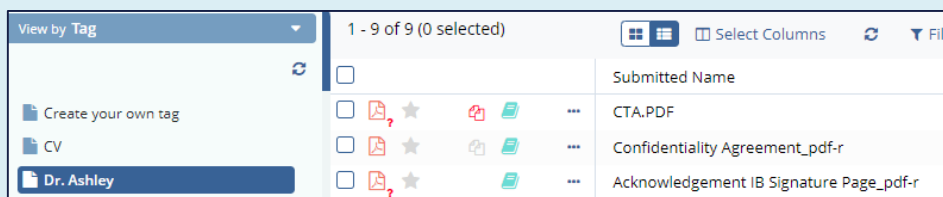
See related job aid: **How to Enable the Document Tag Feature**

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



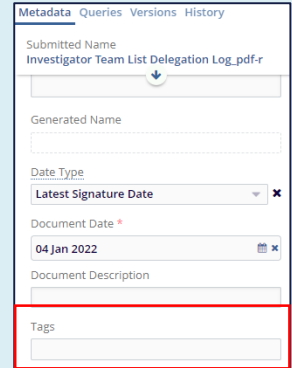
2. To view documents that already have tags associated to them choose the **Tag** option in the **View by Pane**

3. Tags that have been created will display on the left. Click a **Tag** to see the documents that are associated with that tag.

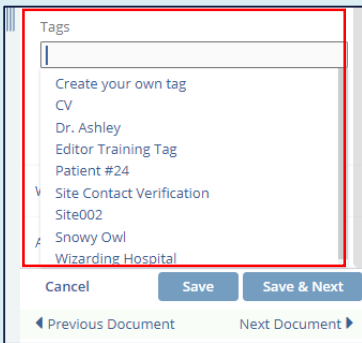


Document Tags are applied during the coding process.

### 1. Locate the Tags field within the Metadata Pane



2. Click in the Tags box to see a list of available Tags that have already been created. Users can choose multiple tags to apply to the same document.



3. To create a new Tag, type the name of the tag into the box, and click the + button to add.

4. Once finished, click Save

