

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.

View by Tag	•	1 - 9 of 9 (0 selected)		📰 🗉 Select Columns 🗧	7 T Filt
:	0			Submitted Name	
Create your own tag		🗆 🖪, ★	ආ 🟉	 CTA.PDF	
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How Use the Document Tag Feature TI v 10.3

Document Tags are applied during the coding process.

1. Locate the Tags field within the Metadata Pane

Metadata Queries Versions History
Submitted Name Investigator Team List Delegation Log_pdf-r
Generated Name
Date Type
Latest Signature Date 🔍 🗙
Document Date *
04 Jan 2022 🛗 🗙
Document Description
Tags

	Tags		
V	Create your own CV Dr. Ashley Editor Training Patient #24 Site Contact Ver Site002 Snowy Owl Wizarding Hosp	Tag	
	Cancel	Save	Save & Next
Previous Document Next Document			

 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

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OPEN	Metadata Queries Versions History
III METADATA	Submitted Name Investigator Team List Delegation Log_pdf-r
DATA	Submitted Name *
	Investigator Team List Delegation Log_pdf-r
	Comments
	Generated Name
	Delegation Log +
Ш	Create your own tag CV
	Dr. Ashley
	Editor Training Tag
	Patient #24
	Site Contact Verification
	Site002
	Snowy Owl
	Wizarding Hospital Site002 × Delegation Log
	Site002 × Delegation Log
	Source
	•
	Cancel Save Save & Next



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