

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.



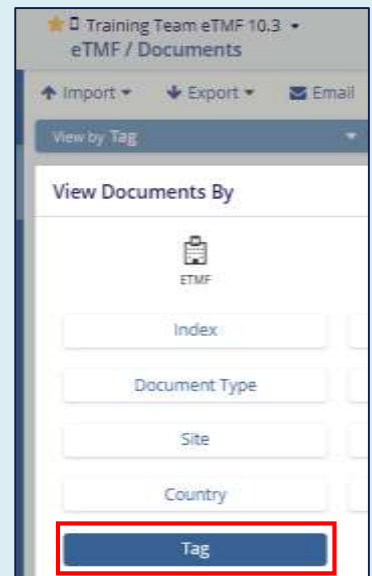
Important: The **Document Tag Feature** must be enabled within the Settings menu, and the **Tags** field enabled within Forms Settings in order for this function to work. Both can be done by a Room Admin.

See related job aid: [How to Enable the Document Tag Feature.](#)

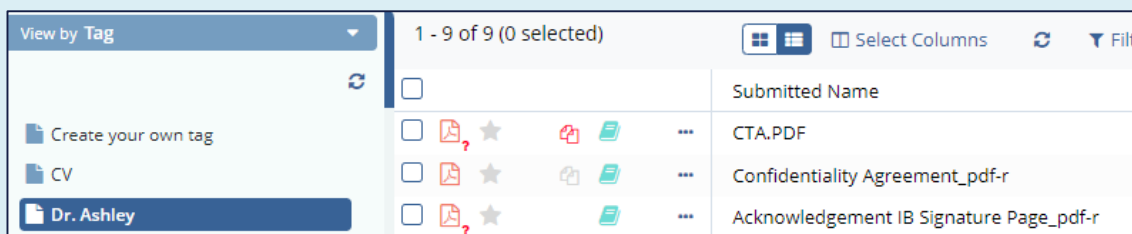
1. Login to a room and navigate to the **Documents Module.**



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.

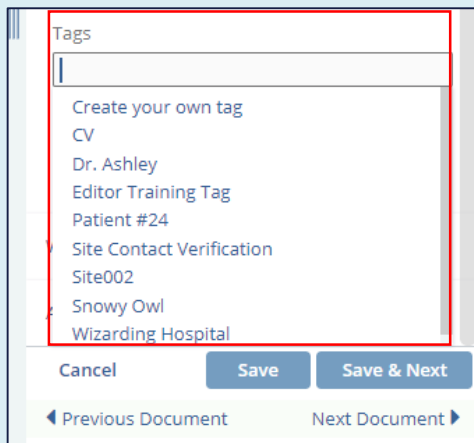
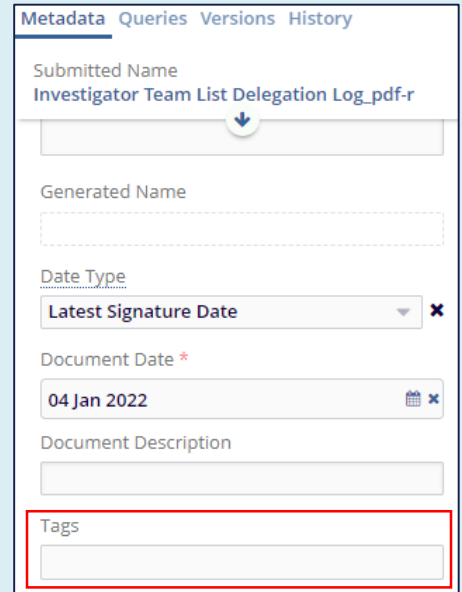


To apply Tags to documents:

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.



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.

