

- APPLICABLE TO:
- ☒ Admin

☐ Manager

☐ Editor

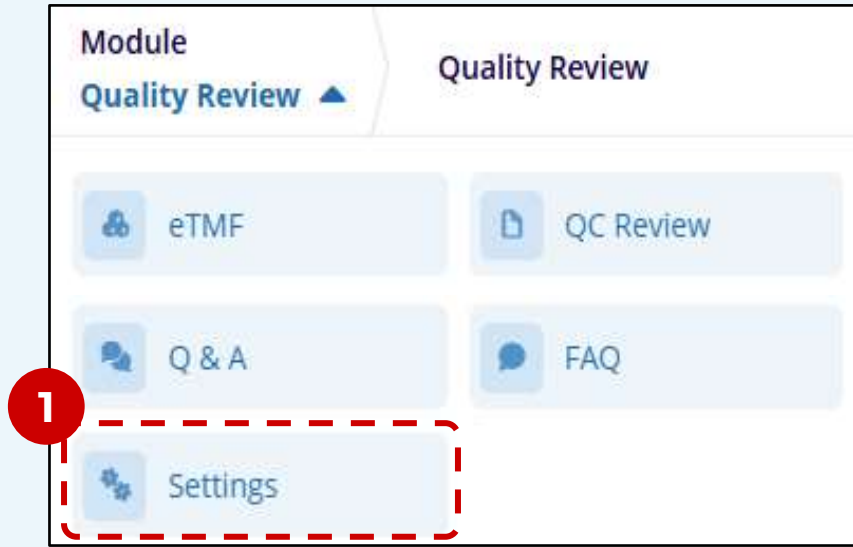
☐ Reader

☒ eTMF

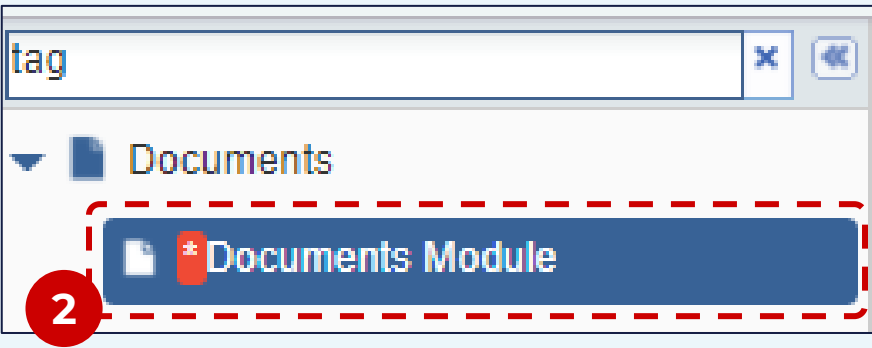
☒ Collaborate

When this feature is enabled for a room, 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 assigned to one record.

1 Open the **Settings** module.



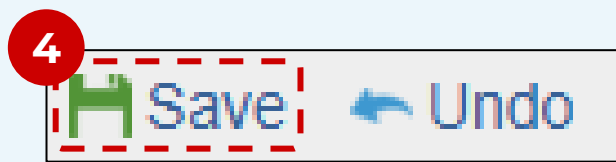
2 Search for “Tag” then select **Documents Module**.



3 Click the checkbox for **Enable View by Tag for Documents**.



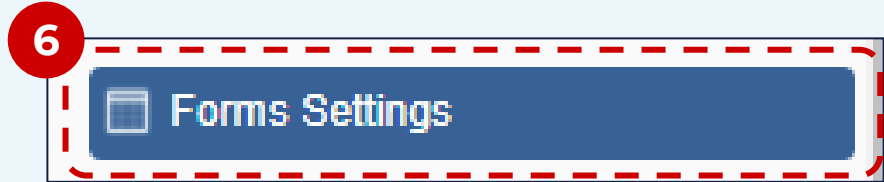
4 Click **Save** when finished.



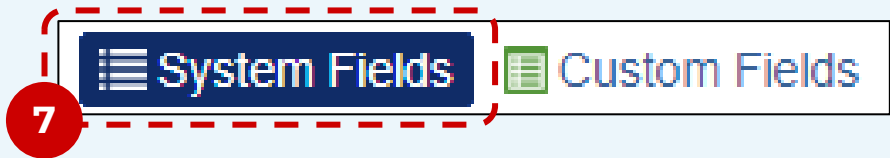
To make Tags a visible field on documents

5 Open the **Settings** module. (see image in step 1)

6 Locate and select **Forms Settings**.



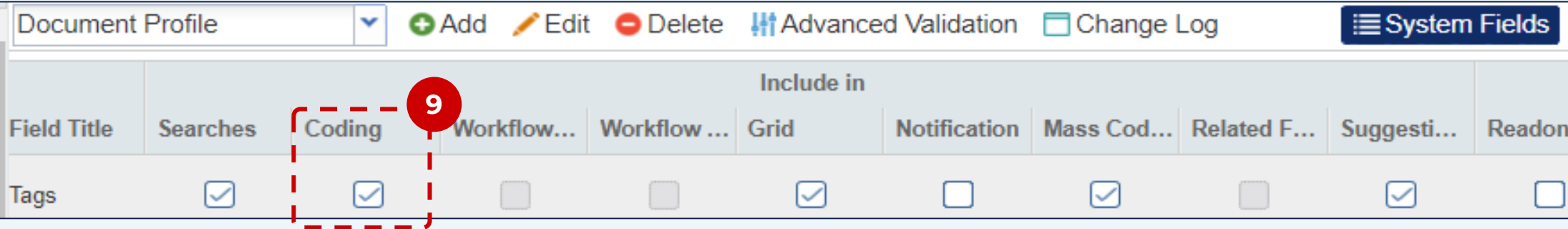
7 Make sure **System Fields** are displayed. (select from top ribbon)



8 Locate the **Tags** entry.



9 Make sure the box for [Include In] **Coding** is checked. You December also choose to include in **Grid** and **Mass Coding** for maximum visibility.



10 Click **Save** to preserve the changes.

