

How to Enable the Document Tag Feature

TI version 10.7

APPLICABLE TO:

- Admin
- Manager
- Editor
- Reader
- eTMF
- Collaborate

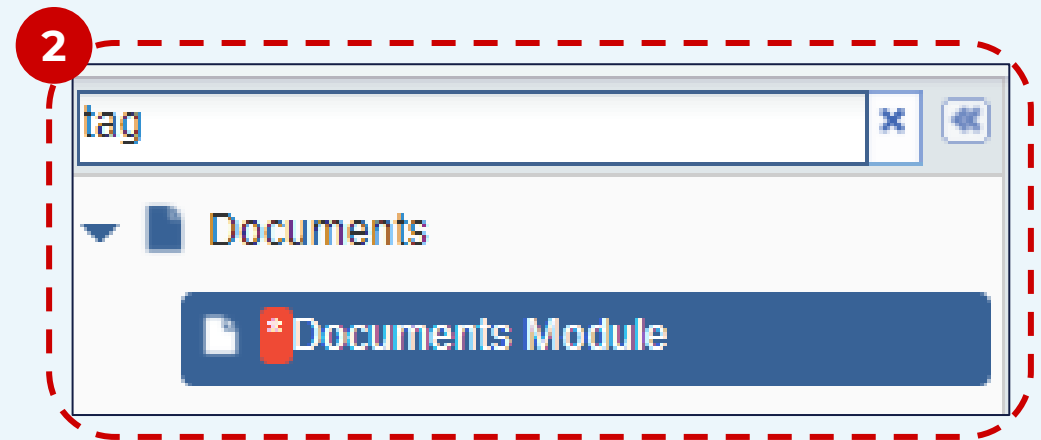
When this feature is enabled for a room, users have the ability to ‘tag’ documents with a specific word or short sentence.

Such **tags** may then be used for filtering, sorting, and reporting.
Multiple tags may be assigned to one record.

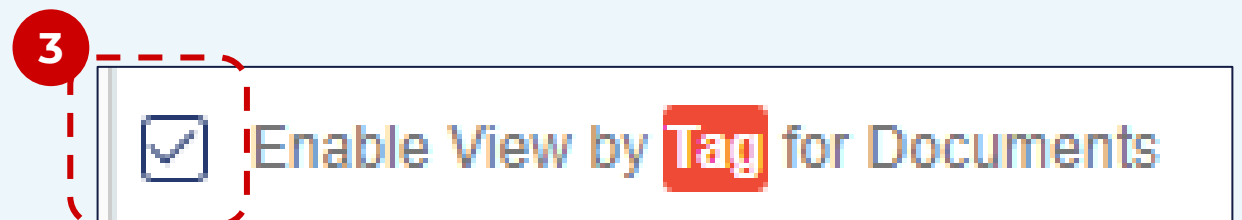
1 Open the **Settings** menu.



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



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

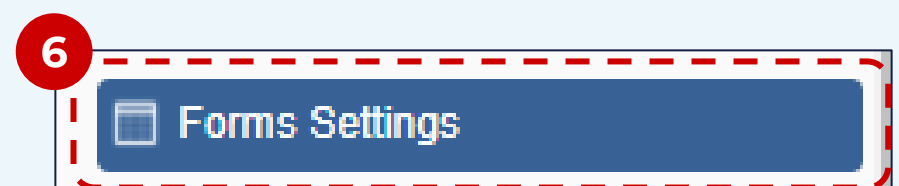


4 Click **Save** when finished.

To make Tags a visible field on documents

5 Open the **Settings** menu.

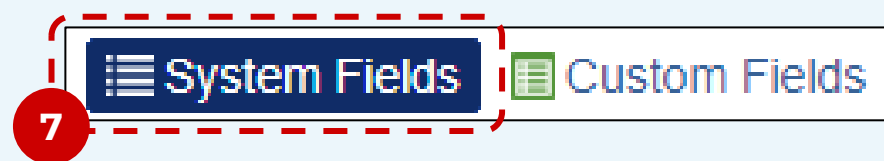
6 Locate and select **Forms Settings**.



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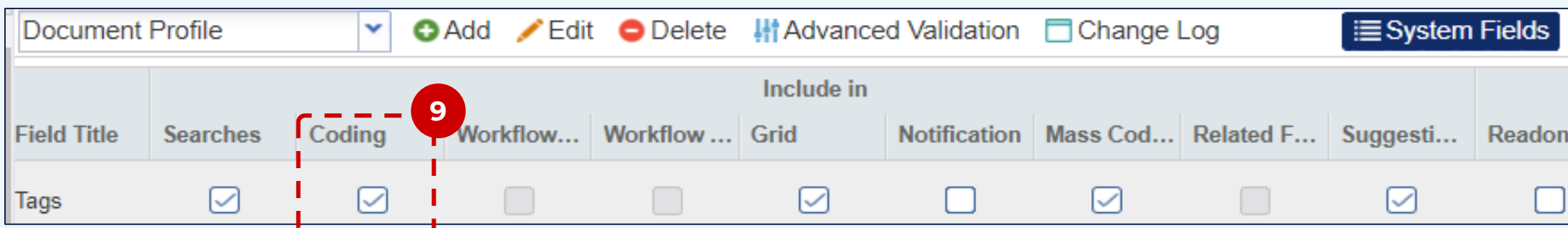
7 Make sure **System Fields** are displayed. (select from top ribbon)



8 Locate the **Tags** entry.



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



Field Title	Searches	Include in								Readon
		Coding	Workflow...	Workflow ...	Grid	Notification	Mass Cod...	Related F...	Suggesti...	
Tags	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

