

APPLICABLE TO:

● Company Admin

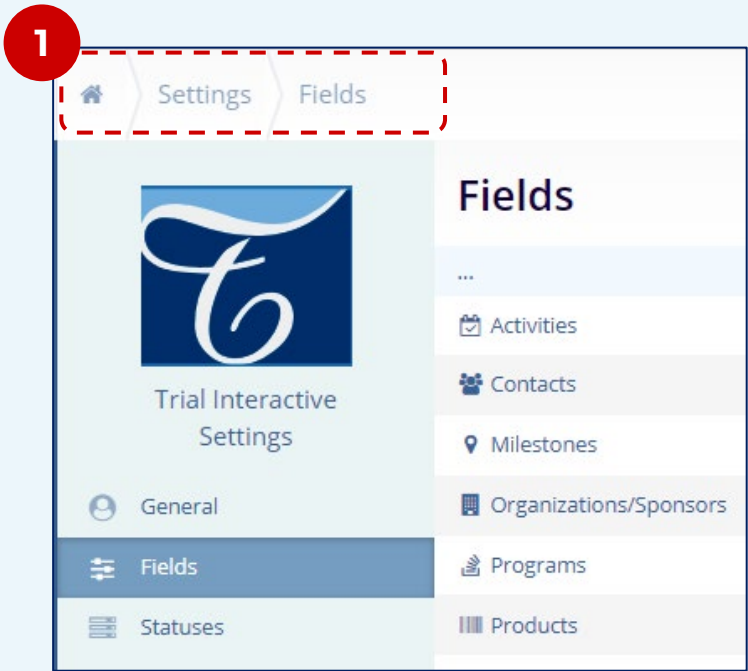
● CTMS

Summary:

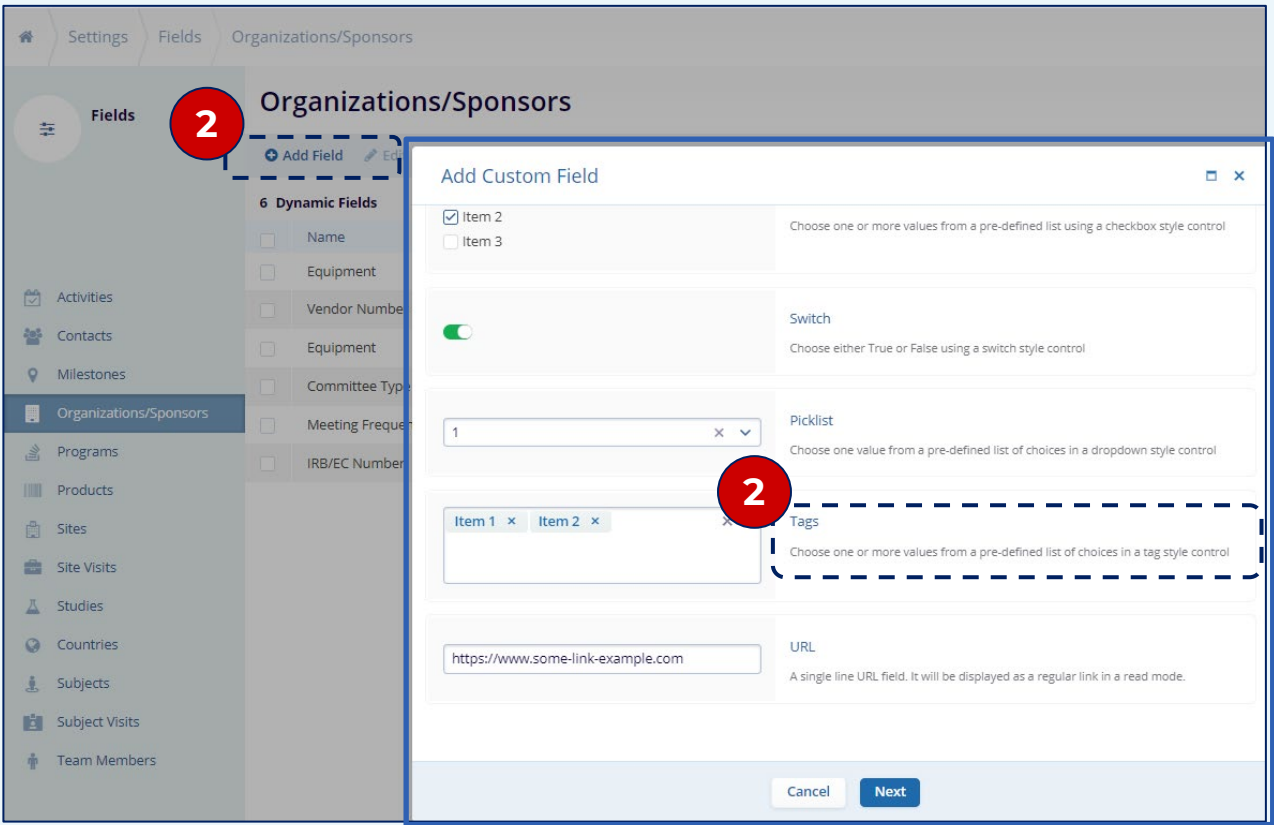
Using tags on a record in a CTMS helps users organize and quickly retrieve information, streamline workflows, and improve collaboration across teams. Tags enable more efficient categorization, filtering, and reporting, making it easier to manage trial data and ensure key items are easily accessible and trackable throughout the clinical trial process.

1 Create a Custom Tag field:

This can be completed by an Administrator through **Settings > Fields** and selecting the record type the tag field is associated with



- 2
- Click **Add Field**
 - Select Tags from the list of custom field types
 - Click Next



- 3
- Enter the tag field Name
 - Complete any additional information
 - Click **Next**

4

Defining selectable Tag values:

- Click **Add** (to create each value)
- Click **Save** (for each value)
- Click **Create**

5

Reference the “How to Customize the Grid” job aid to add this custom field to your filtering