

How To Use the Document Tag Feature

TI version 10.8

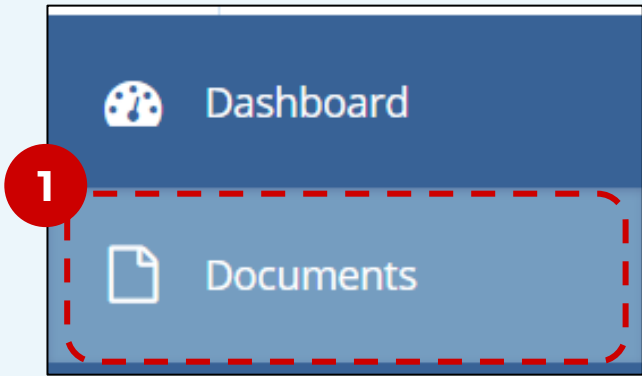
APPLICABLE TO:

- Admin
- Manager
- Editor
- Reader
- eTMF
- Collaborate / eISF

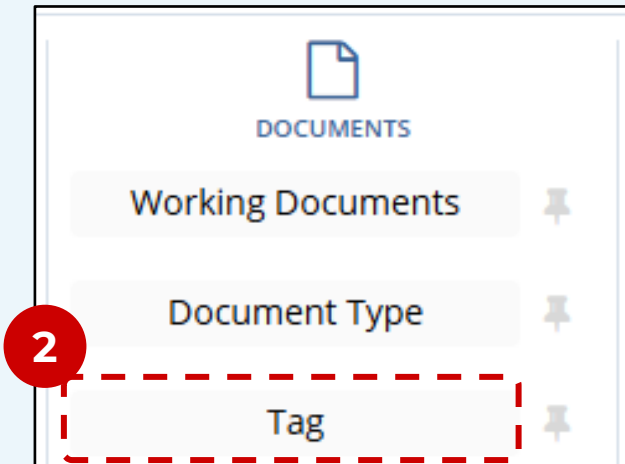
Document Tags can be enabled in TI rooms to provide an alternative way to identify, filter, search for, and group documents. Tags can be found in searches like all metadata, or through a dedicated 'View By Tag' in the Documents library.

To View Tags

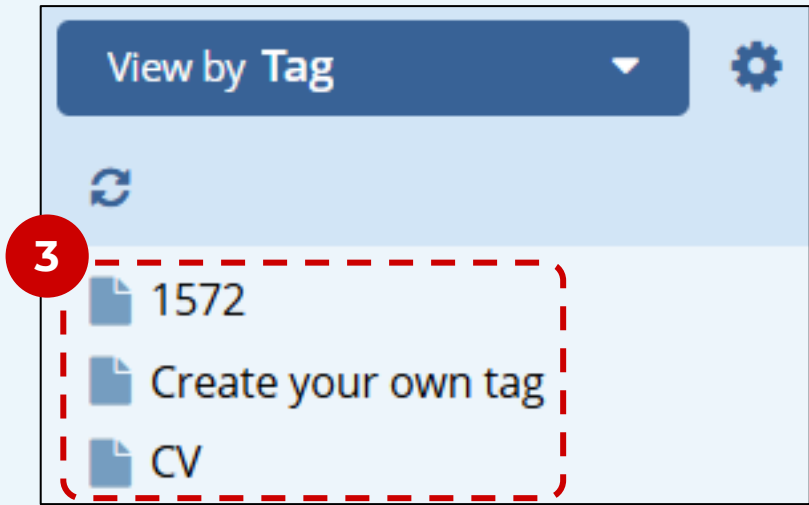
1 Navigate to the **Documents** library.



2 Select the **Tag** documents view.



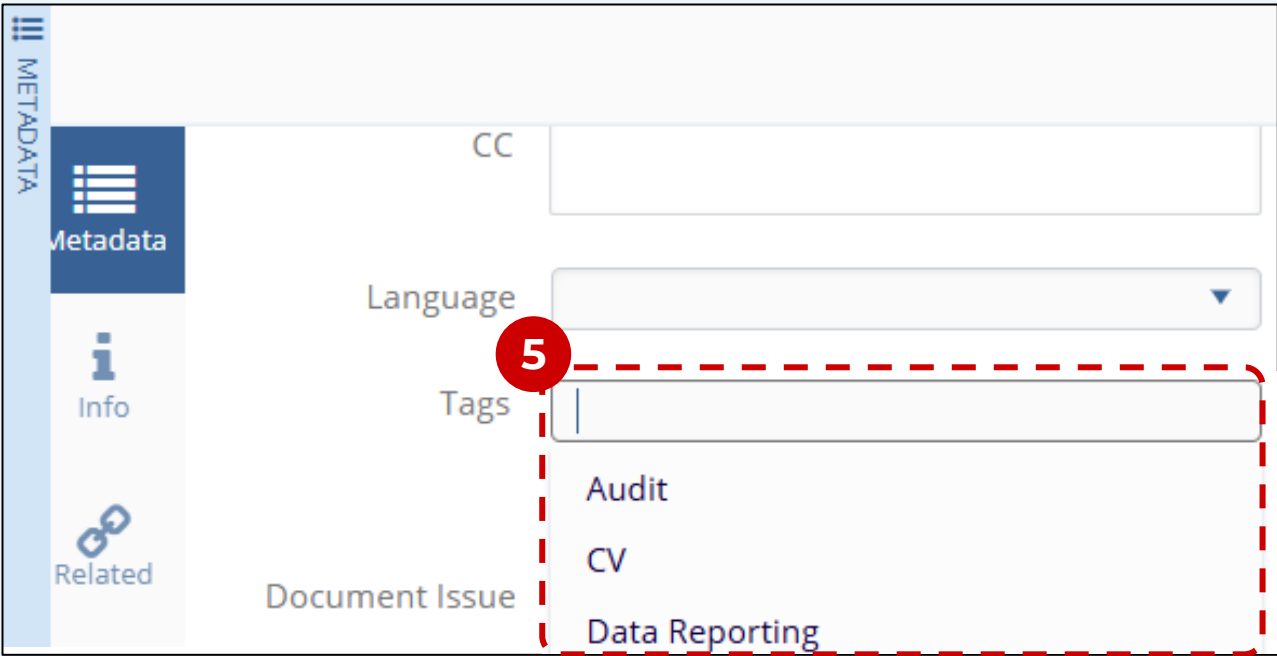
3 Existing tags will display as folders. **Click one** to see a list of documents that are currently associated with that tag.



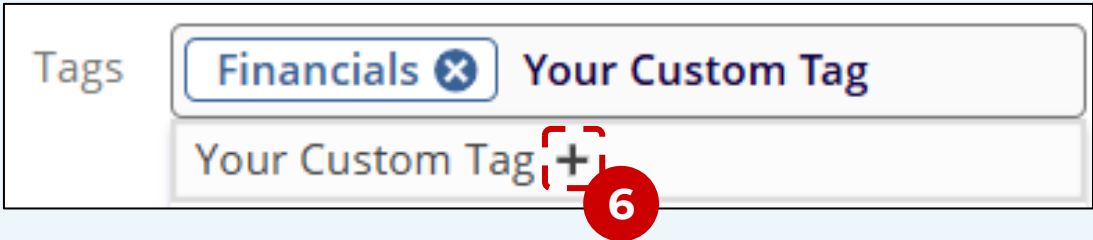
To Assign Tags

4 Select a document and expand the metadata panel.

5 Locate the **Tags** field (location may vary), and start typing a new tag - or select one of the existing options.



6 You may add new tags simply by typing, then clicking the '+' button.



7 For the changes to take effect, do not forget to click on the **Save** (or **Save&Next**) button at the bottom of the panel.

