Document Tags

Tags can be assigned to documents so they can be easily located in a global fileroom search on the Content Search page.

Add a Tag

1. From the menu on the left side, go to Admin > Fileroom > Tags.

2. Click the Add Tag button.
3. Enter the Tag Name.
4. Click Save.

Edit a Tag

To edit a Tag, click the Tag under the Tags column to open.

When finished making your changes, be sure to click the Save button.

Delete a Tag

To delete a Tag, click the Delete button under the Delete column.

Assign a Tag to Multiple Documents

1. Below the user menu, click the Search button.
2. At the Content Search page, locate the documents you want to tag using the search fields, then select the documents using the checkbox under the Actions column.
3. After you select the documents you want to tab, click the Fx button above the document list.
4. From the Fx menu, click the button next to Tag.
5. In the pop-up window, select the tags you want to assign, then close the window.