

Add Tags

Menu > Admin > Setup > Tags

Managing tags enables you to tag documents for special projects and relative query searches. Just as in the department, language and workflow status, you type in the tag name and click on save. Continue to add until completed.



1. Give your tag a Name. Examples such as, Pending, Work In Progress, Paid, On Hold...
2. Click Save.

Tag Documents



1. From the File/Review screen, click on the Fx icon, then select Tags, or you can use the Fx button located on any locating screen.
2. Add the tag(s) you would like to associate with the document.

Search for Tagged Documents

1. Menu > Locating > Content Search
2. From the Tag dropdown, select the tag you would like to search by.



3. Click Search.