Tagging Documents

Goal
You will be able to Tag documents.

The tag action allows the user to batch tag the documents.

NOTE: More detailed help instructions can be found in Rational under Help>User Guides on the toolbar.

Prerequisites
The user knows has created a Search.

Tag
The tag action allows the user to batch tag the documents. Tag offers three options:
a. Tag parents only
b. Tag parent and child
c. Tag child only

Parent –Child Relationship: A parent (top level document) is an email and children are an attachment.

Document lists show top-level documents. This means that if you have an email (parent document) and an attachment (its child), only the email (parent/top-level document) will appear listed in the list. Attachments are shown in a separate tab when clicking on the paper clip icon to the right of the parent document. Tags are applied in the same way, using the parent or parent and child. You can apply the tag only to the parents; option a or to the parent and child; option b or to the child only; option c.
Creating and applying tags
To create a tag, select the documents you wish to apply the tags to (explained above) and the following dialog will appear.

To create a new tag, click Create Tag and the dialogue shown to the right above will appear. Enter a name and add a search (optional) and click Create. The tag will appear listed in the dialog. Check the tags you wish to tag the documents with by selecting the checkboxes and then click OK to apply the tag.

NOTE: Adding a search to the creation of a tag makes the tag evergreen. This means as other files that match that search criteria are added to RG; they will automatically be tagged for that specific characteristic.

NOTE: You can apply more than one tag at a time.
To search for an existing tag, type in the tag name in the search bar and click Search.

Removing tags
To remove applied tags from documents, click on the option in the Document Actions menu to Remove tag and then select the parameters to define which documents you wish to remove the tag from. The dialog will appear listed (as shown above). Select the tags you wish to remove using the checkboxes and then click OK to remove the tag from the documents.

Tags can also be seen on the document level by going into the viewer and navigating to the Tags tab. They can also be added and removed from individual documents here.

NOTE: There is a way to manage tags including editing their names and deleting/hiding them from the UI. Contact the RF System Administrator.