

Release Notes - Tagging

Release Date

5th Dec 2022

Overview

Tags are virtual labels or keywords that can be added to Documents and then used to search for groups of documents that contain similar text or subjects. The Tags available for use are bespoke to each Centrik site and can be maintained by a user.

What is new?

- The ability to create 'virtual labels' or 'keywords' and attach these to documents.
- Search for documents or groups of documents using 'virtual labels' or 'keywords'.
- The ability to create 'Parent' groups with sub 'Children' groups, creating a hierarchy of items, these are viewable and searchable at each level.
- Future enhancement will provide the ability to tag other types of objects across the suite of modules within Centrik, from safety cases to audit findings.

Why are we doing this?

Tagging can be a hugely powerful tool to an organisation, assisting users by the ability to organise, group and build associations between Centrik objects that would not otherwise be related.

This change enables Managers of their Centrik system to create Groups and subgroups of labels (Tags) and, in the first iteration, **associate these to documents**. The ability to do this across the Centrik suite of modules will follow in due course.

The benefit of this means less searching for associated items.

As an example, in the event of a regulation and or legislation change you will be able to search at a granular level for a virtual tag or keyword allowing you to view and identify all tagged documents that could be affected or associated by this change.

Items such as Change Requests (CR) across an organisation become faster by allowing quick searches of documents requiring change.

More importantly as tagging gets rolled out across all of the Centrik modules you will have the ability to organise your data within your Centrik site, building associations between things that wouldn't usually be related, and helping you to search for information on a more granular level than what was previously available.

Who does this affect?

Tags are designed primarily as a management tool and will only be visible to those with 'Manage' permissions access rights.

How do I use Tagging on my site?

Click on the following link to see a 'How to' video.

- [Tagging video](#)

This video will highlight an overview of the new Tagging functionality, including how to create virtual tags, and how to link these to documents

FAQ

Q. How can I enable tagging on my system?

A. Tagging can be enabled by the Centrik Support team.

Q. Do I have to enable tagging on my system?

A. No, the additional functionality is aimed to assist managers with a quick way of linking documents to one another by the means of a virtual tag or keyword and create efficiency within an organisation when used correctly.

Q. Can I use tagging in other Centrik modules?

A. At this point tagging is only available within the documents module however it will soon be made available across the Centrik suite of modules

Q. Can I use as many tags as I like?

A. Yes, if enabled on your site you can add as many virtual labels 'tags' as you wish. The idea is to make searching for information easier for your organisation. The temptation might be to add tags to everything but ask yourself 'would this confuse?'. Keeping things simple is usually the best way forward however there is no limit to the number of tags that can be added.

Q. What access rights are required for Tagging?

A. There are two access rights associated with Tagging, 'View Tags Structure' will allow the user the ability to view created tags as well as the tag structure within your site. Users will not be able to make changes to existing tags, or add new ones.

The 'Manage Tags' access right allows a user the ability to manage tags across your system, including, creating a tag group, and any children within that group, the deactivation of tags and, the migration of tags.

Q. Will Document Managers require the 'Manage Tags' access rights?

A. No, Document Managers will be able to use created tags in the system when adding or amending any system documents without the requirement of additional access rights.