

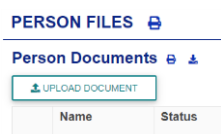
DOCUMENT TAGS

Q: What are Document Tags and what are they used for?

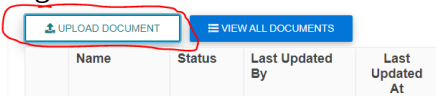
A: Tags are a way of organizing Documents into groups/folders within a Case for easier access. A Document is allowed to have up to 5 Tags on it simultaneously. Zelly Tags work similar to Tags within Evernote. One could consider them like the folder names that may have previously existed under a given Casey Case folder on the network drive.

Q: How do I add a Document Tag to a Document?

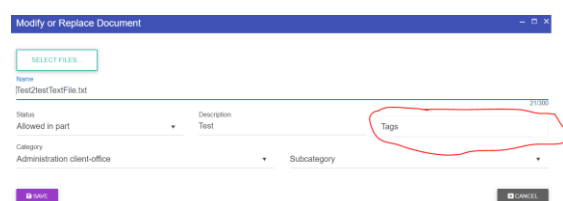
A: In the Person Documents section of the Details and Add/Edit Person pages.



Tags can also be added to Documents on the upload Document modal,

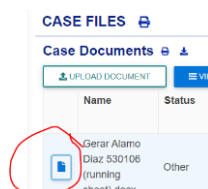


as well as on the modify/replace Document modal. This applies to both Person Documents and Person Runsheet Documents.



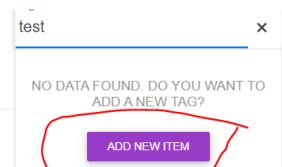
Tags for Case related Documents can be added/removed in a similar fashion. In the Case Documents section of Case pages, Tags can be added to Documents on the upload Document modal as well as on the edit/replace Document modal. This applies to both Case Documents and Case Runsheet Documents.

Tags can be added/removed on the Document Details page as well.



Q: How do I add a new Document Tag to Zelly?

A: When adding a Document Tag to a Document via the Document Tag drop down, users have the option to create a new Tag with the given Name/Text if one doesn't already exist.



Q: What types of Document Tags should I add to Zelly?

A: Think about what types of Folders you created on the network drive for Documents related to Casey Cases. Those would make excellent Document Tag options within Zelly.

If you are familiar with Evernote and how it handles Tags, utilize the same approach for Document Tags within Zelly.

Q: Who can see which Document Tags?

A: All Users can see and use all Document Tags. Tags are only filtered in one way within Zelly. A given Document Tag is either a Case related Document Tag or a Person related Document Tag.

Q: Why can't I edit the name/text of an existing Document Tag?

A: Since all Users can use all Document Tags, we need to be very careful when editing the name of a Tag that has already been used. Only System Admins / IT have permissions to update the name of a Document Tag. If you need one changed, please notify zelly@publiccounsel.net, and Zelly Support will follow-up with you about it.

Q: How do I search for Documents by a Document Tag?

A: On the Document search page, you can use the Tag filter in the upper right of the search criteria area. You can also click on a Tag in the search results rows to search for documents with that specific Tag as well.

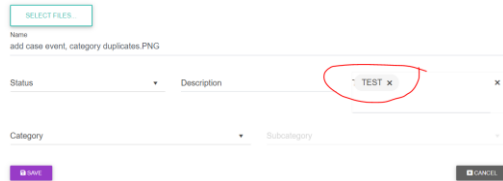
Document Search

Document	Document Name	Description	Last Updated By	Tags
Person	First Name	Match Type Contains	Middle Name	Last Name
	Address	City	State	Zip Code
Case	Case #	Docket #		

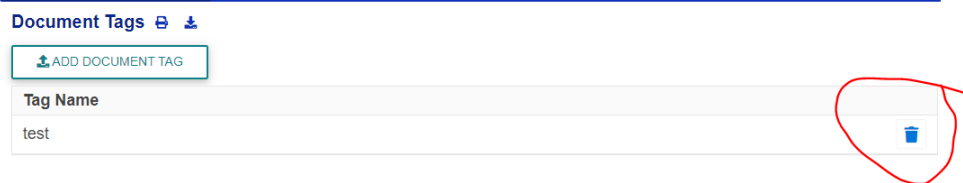
This also works on the View All Case Documents and View All Person Documents pages.

Q: How do I remove a Document Tag from a Document?

A: Anywhere an 'X' is displayed within the Tag "button", it can be used to remove the Document Tag from the given Document.



The Trash Can icon next to the Tag can also be used on Tag grids/lists, such as the one on the Document Details page.



Neither of these approaches will remove the Tag completely from Zelly. They only remove the given Tag from the given Document. The Tag can still be used within Zelly for other documents. Only the Zelly Support team (zelly@publiccounsel.net) has the ability to permanently remove a Tag from Zelly.