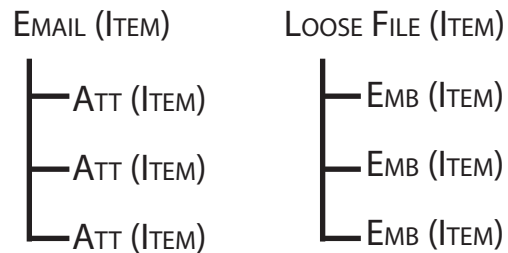


How Tag Sets and Filter Type Impact Filter Counts

WHAT IS A DOCUMENT FAMILY?

A document family is an email or loose file and the associated attachments (ATT) or embeddings (EMB). Each file in a document family is an individual item.

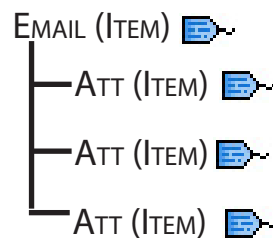


HOW DOES TAGGING WORK?

When you want to mark an item for future reference, you tag the item. The tag you use belongs to a tag set, and that tag set determines how the tag behaves. In the example below, items are tagged *Responsive*.

DOCUMENT FAMILY TAGGING

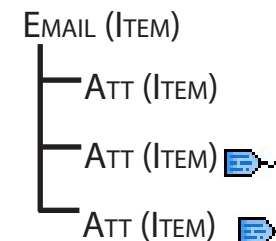
Applying tags from a document family tag set propagates the tag to every item in the document family.



Note! Changing a tag on any item changes the tag for every item in the document family.

ITEM-ONLY TAGGING

Applying tags from an item-only tag set applies the tag to the specific item.



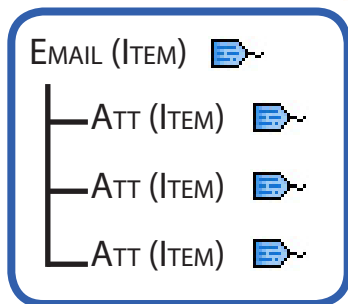
Note! If you filter an item-only tag set with the document family filter, you could tag every item in the document family, but the filter will only display a count of 1.

WHICH FILTER SHOULD YOU USE?

DOCUMENT FAMILY FILTER

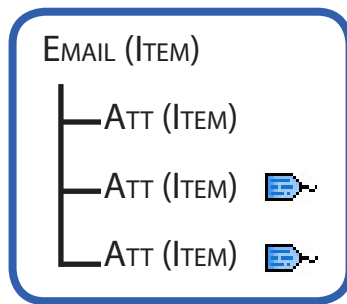
Views document family as a whole.

DOCUMENT FAMILY TAG SET



Tagged item(s) in **document family**? Yes = 1
FILTER COUNT = 1

ITEM-ONLY TAG SET

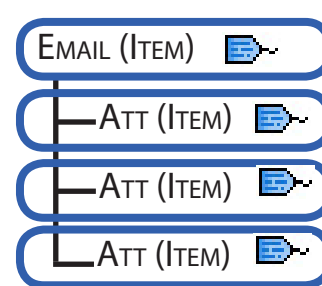


Tagged item(s) in **document family**? Yes = 1
FILTER COUNT = 1

ITEM-ONLY FILTER

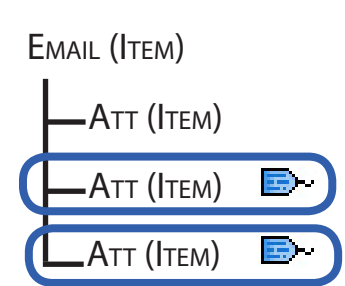
Views and counts each tagged item in a document.

DOCUMENT FAMILY TAG SET



How many **items** are tagged? 4
FILTER COUNT = 4 ITEMS

ITEM-ONLY TAG SET



How many **items** are tagged? 2
FILTER COUNT = 2 ITEMS