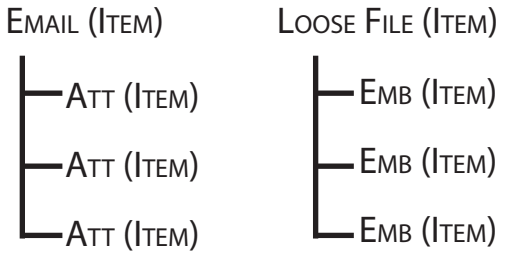
How Tag Sets and Filter Type Impact Filter Counts

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.

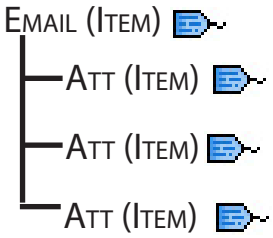


How Does Tagging Work?

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

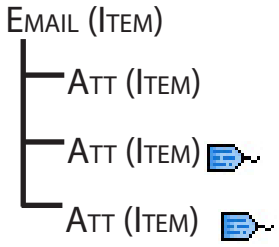
Applying tags from a document family tag set propagates the tag to every item in the document family.



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.



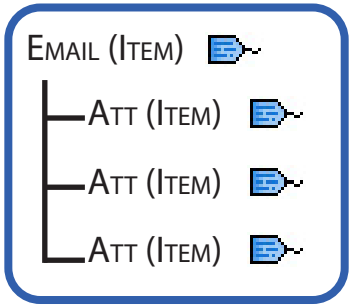
Note! If you filter an item-only tag set with the document family filter, you could tag every item in the document family, but the filter will only display a count of 1.

Which filter should you use?

Document Family Filter D I

Views document family as a whole.

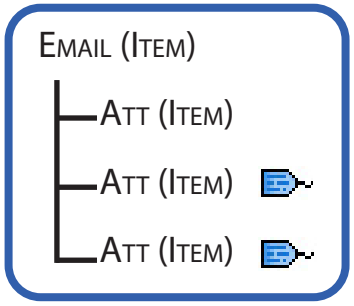
Document Family Tag Set



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

Filter Count = 1

Item-Only Tag Set



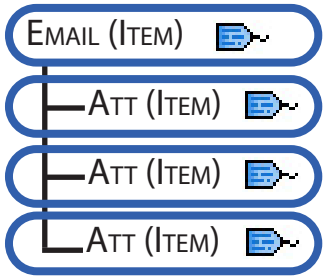
Tagged item(s) in **document family**? Yes = 1

Filter Count = 1

Item-Only Filter D I

Views and counts each tagged item in a document.

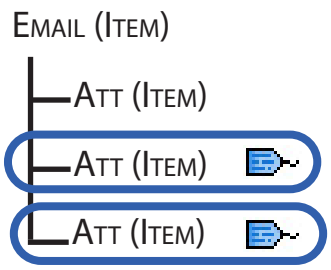
Document Family Tag Set



How many **items** are tagged? 4

Filter Count = 4 items

Item-Only Tag Set



How many **items** are tagged? 2

Filter Count = 2 items

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