

# ADMINISTRATION

## Create groups and tags

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### SUMMARY:

You can categorize documents in several different ways with Ubidogy, and we'll go through this document

- 1) Tags
- 2) Document Sets/Types
- 3) Categories

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**Ubidogy A/S**

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# Tags

Tags are a way to mark up your documents so they'll be easier to find in the future.

Tags are words you can use to classify your documents, and it's a bit more freestyle than document categories.

The screenshot shows a form titled "Valgfri information" with a yellow circle containing the number "1" and an upward arrow icon. Below the title is a "Beskrivelse" field with an information icon, containing the text: "Non Disclouser Argument Between[Name] and [Company] Concerning Confidential bussiness Arguments." Below this is a "Tags" field with an information icon, containing two tags: "abc" and "tag2", and a yellow circle containing the number "2". Below the tags field are two dropdown menus: "Kategori" with the text "Vælg kategori" and "Dokumenttype" with the text "Vælg dokumenttype". At the bottom of the form are two buttons: "Forhåndsvisning" and "Send".

In signing, you can select Optional Information and then you can create Tags. If you have made tags before, they will come as suggestions, but otherwise you just type your tag and press enter.

You do this as many times as you want tags.

# Categories

Valgfri information 1 ^

Beskrivelse ⓘ

Non Disclouser Argument Between[Name] and [Company]  
Concerning Confidential bussiness Arguments.

Tags ⓘ

Kategori ⓘ Dokumenttype ⓘ

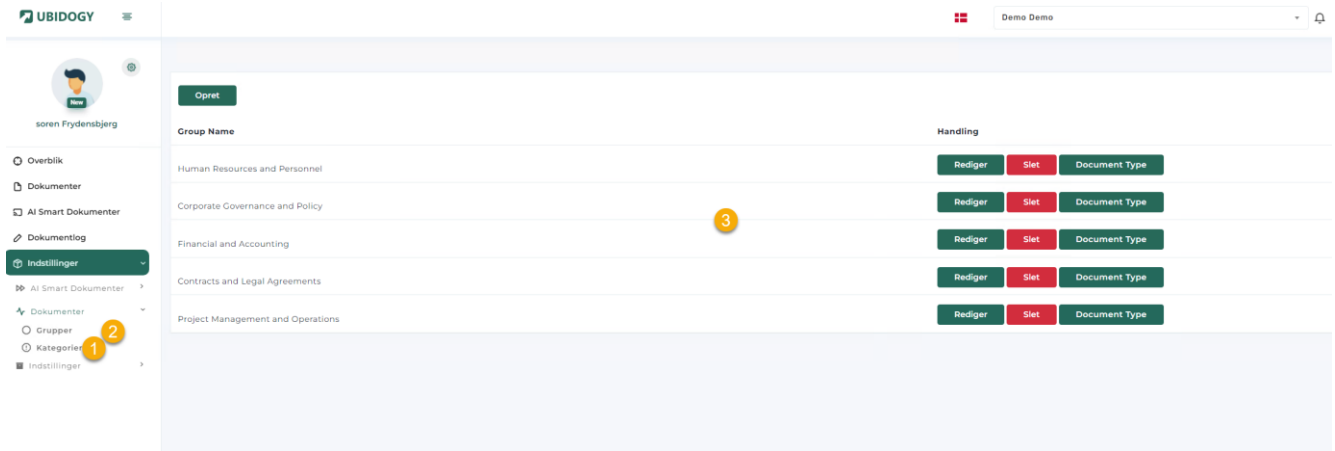
Temporary documents 2 Employment Contract 3

Forhåndsvisning Send

Categories are an additional way to categorize documents. When signing, you can choose categories you have created in the left dropdown.

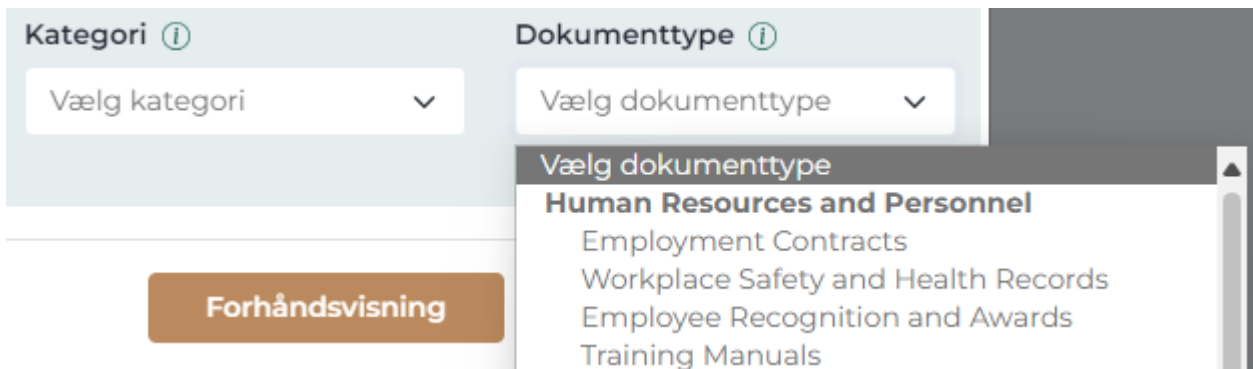
When you sign up for Ubidogy, you automatically get some categories. You can delete them and make your own.

To create categories, select Options, → Documents, → Categories



## Document Sets/Types

Document sets and types (seen as document types in the user interface) are also a way of grouping.



The marked headings (Human Resources and Personnel) are a group under this one has document types.

You can create the groups and types you need by going to Settings, → Documents, → Groups.

The screenshot shows the Ubidogy web application interface. At the top left, the logo 'UBIDOGY' is visible. Below it, the user profile for 'soren Frydensbjerg' is shown. A sidebar on the left contains navigation options: 'Overblik', 'Dokumenter', 'AI Smart Dokumenter', 'Dokumentlog', and 'Indstillinger'. The 'Indstillinger' menu is expanded, showing 'AI Smart Dokumenter', 'Dokumenter', 'Grupper', 'Kategorier', and 'Indstillinger'. The main content area features a table with the following structure:

Group Name	Handling
Human Resources and Personnel	Rediger Slet Document Type
Corporate Governance and Policy	Rediger Slet Document Type
Financial and Accounting	Rediger Slet Document Type
Contracts and Legal Agreements	Rediger Slet Document Type
Project Management and Operations	Rediger Slet Document Type

Yellow callout circles are present: '1' is next to 'Indstillinger' in the sidebar, '2' is next to 'Grupper', and '3' is next to the 'Document Type' button in the table row for 'Financial and Accounting'.

Types are created under each group by selecting Document Type in the line.