Logging In

1. Visit: https://companyname.thoughttrace.com/classifier/ .
2. Enter Username and Password. Click **Log In**.

Tip: Be sure to substitute your company name in the URL above.

Uploading Documents

1. Click **Upload** in the top navigation bar.
2. Drag and drop file(s) or click to browse for file(s). Click **Next**.
3. Select **One Document** or **Multiple Documents**. Click **Next**.
4. Add Tags, select a Profile and populate Attributes.
5. Click **Start Upload**.

Tip: You may specify a document type when uploading one document.

Reclassifying Documents

1. Open the document.
2. Click the **Reclassify** button.

Tip: You can also reclassify documents within packet view.

Merging Documents

1. Open the packet and select documents. Click **Merge Documents**.
2. Select a Document Type.
3. Type a name and arrange document order (optional).
4. Click **Merge**.

Tip: Selected documents must reside within the same packet.

Adding Attributes

1. Open the packet or document.
2. Click the ⊕ icon and select an attribute.
3. Enter the value and click the ✔ icon to save.

Tip: Attributes can be added in packet view or document view.

Adding Tags

1. Open the packet or document.
2. Click in the Tags text box and begin typing.
3. Select the text from the drop-down list to confirm.
4. Click the ✔ icon to save.

Tip: Tags can be added in packet view or document view.

Modifying Document Types

1. Click the ▾ next to the current document type.
2. Select the appropriate document type from the drop-down list.

Tip: Document types can be modified in the packet or document view.

Updating Document Statuses

1. Click the ▾ next to the current document status.
2. Select the appropriate status from the drop-down list.

Tip: Statuses can be updated in packet view or document view.

Searching for Documents

1. Click **Home** in the top navigation bar.
2. Apply Filters:
   - Use search bar to filter by document name or text.
   - Type Tags and select values from drop-down list.
   - Click **Add Filter** to add Attributes and/or Entities.
   - Select Document Types and/or Statuses.

Getting Help

1. Click the ❓▾ button in the top navigation bar.
2. Select the appropriate resource from the drop-down menu:
   - **Support**: Support, product updates and knowledge base
   - **ThoughtTrace Academy**: Free online training and webinars
   - **Community**: User discussions and enhancement requests