How to Use Tagging Quick Guide

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How to Tagging Features

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What is Tagging?

Tagging is a labelling feature that can be used to tag different items or records. Tagging helps the users in organizing their records into categories. There are two types of tagging in Teczo:

1. My Tags – personal tags which can be defined and only seen by the current user.
2. Company Tags – tags which can be defined by the system administrators and can be seen by record members. There are two types of company tags:
   a. Default Tags – defined by the system administrators by assigning abbreviation and description
   b. Field Tags – data maintenance fields that are assigned by the system administrators which can be used in different modules.
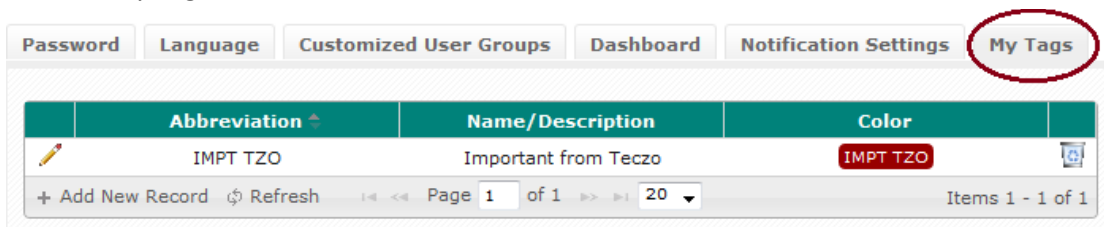
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Create My Tags

Here's how to create My Tags or personal tags that can be assigned to one or more of user's records or items.
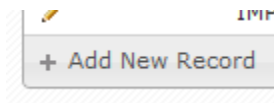
1. On the topmost right corner of the page, click the My Account icon.
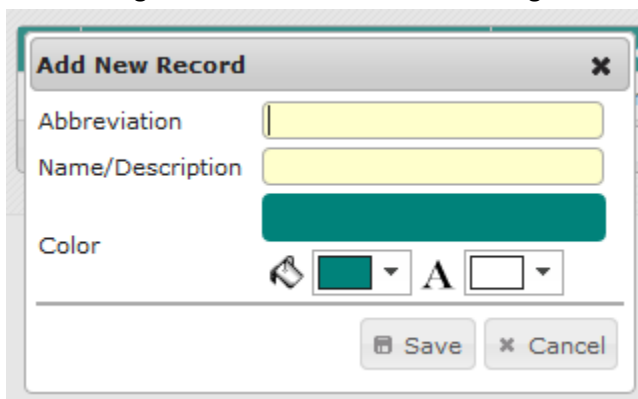
2. Click the My Tags tab.

3. Click the Add New Record button.

4. Define or Type the Abbreviation (up to 8 characters), Name/Description (up to 50 characters), select background and font colour for the tag and click Save.
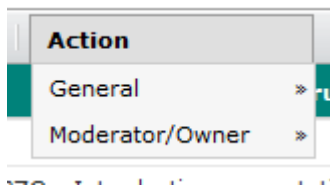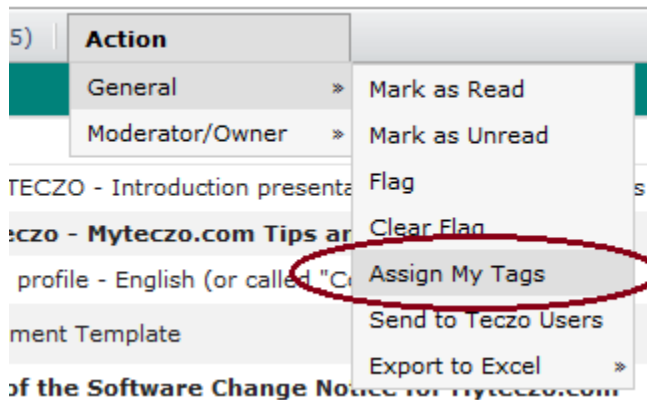
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Assign My Tags

A User can assign a personal tag to one or more items through the following:

1. Select one or more records or items in the summary table.
2. Click the Action dropdown selection through the state bar.

Action	
General	»
Moderator/Owner	»

3. Under the General selection click the Assign My Tags.

Action		
General	»	Mark as Read
Moderator/Owner	»	Mark as Unread
		Flag
		Clear Flag
		Assign My Tags
		Send to Teczo Users
		Export to Excel »

4. Select the personal tag from the list and click Save.   The User can search the list by typing characters in the search box.

Tag As:

☑ Important from Teczo (IMPT TZO)

Save   Cancel
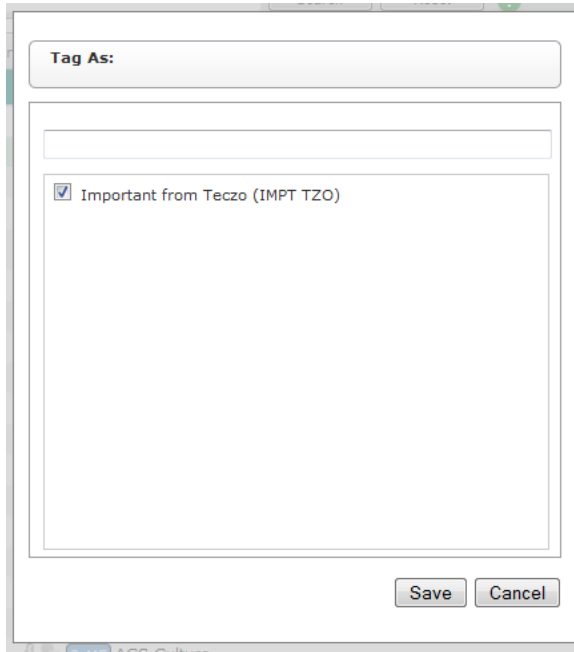
5. The Tag abbreviation will be displayed in the selected records or items in the summary table. Hovering over the tag will display the tag name/description.
Note: Personal Tags are displayed without underline.

693	IMPT TZO 3-ME STICKY: TECZO - Introduction pres
1476	Important from Teczo yteczo.com Tips and Tric
664	3-ME Company profile - English (or called "Corporat
249	2-HI ACS Document Template

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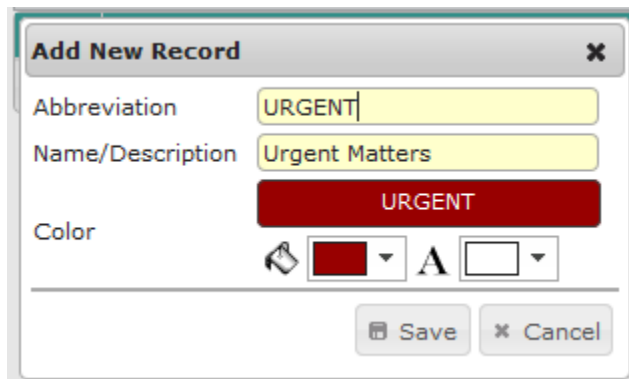## Create Company Tags (For System Administrators Only)

Here's how to create Company Tags or Field Tags that can be assigned by the Moderator and Owners to one or more records or items.

Create Default Tags

1. In the Data Maintenance Module click the Default Tags link under Company Tags (Data Maintenance module default page).
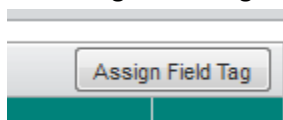
2. Click the Add New Record button.
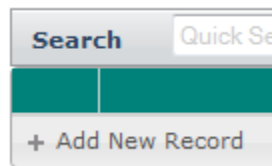
3. Define or Type the Abbreviation (up to 8 characters), Name/Description (up to 50 characters), select background and font colour for the tag and click Save.
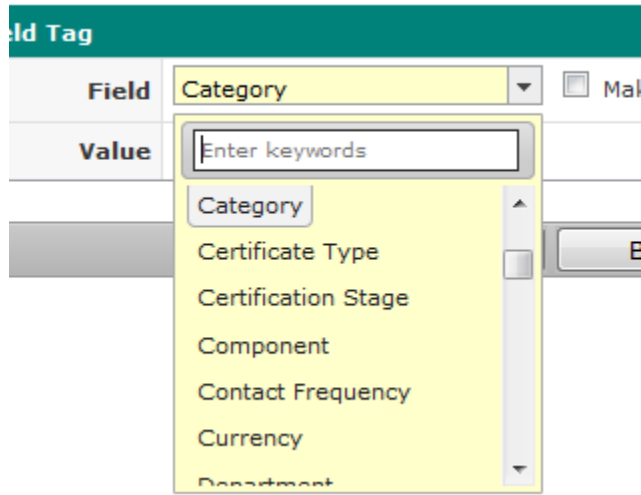

Create Field Tags

1. In the Data Maintenance Module click the Field Tags link under Company Tags (Data Maintenance module default page).
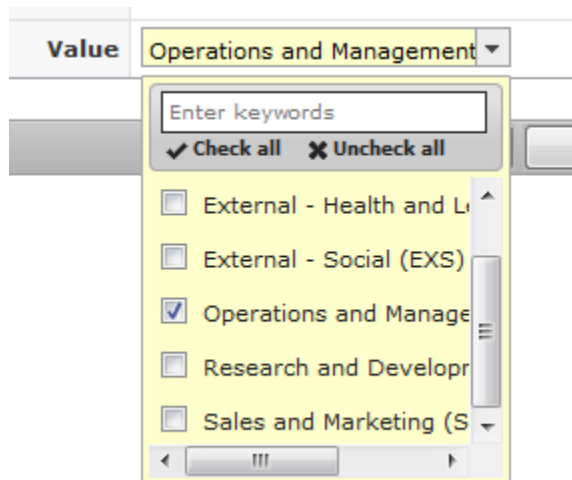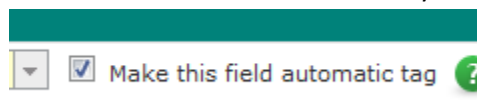
2. Click Assign Field Tag button.

3. Select the desired field


4. Select one or more field values.

5. If desired, click the button beside the field selection to make it an automatic tag. Automatic tags will be assigned automatically whenever the field value is selected through the add/edit page of a record. Moderator or Owner may remove the tag if desired through details page
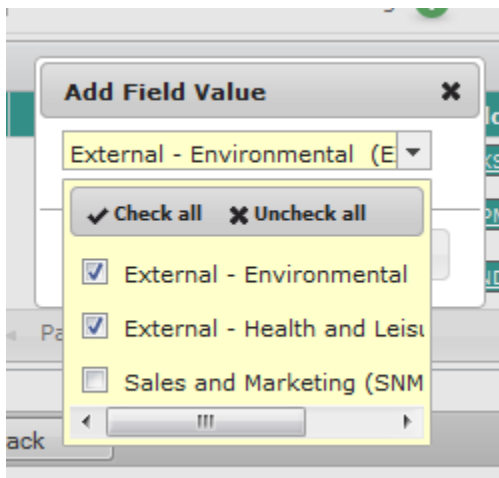
6. Upon saving, the user will be directed to edit page wherein background and font colour can be defined. Click the pencil icon before the abbreviation. Select desired colour and click Save.
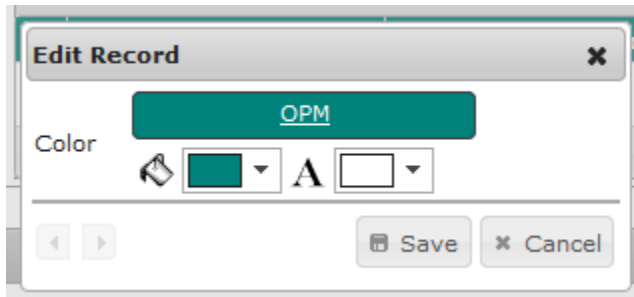
7. The User can assign additional field value by clicking the Add Value button.

8. Select the desired field value and click Save.

9. Repeat Step 6 to define the background and font colour.
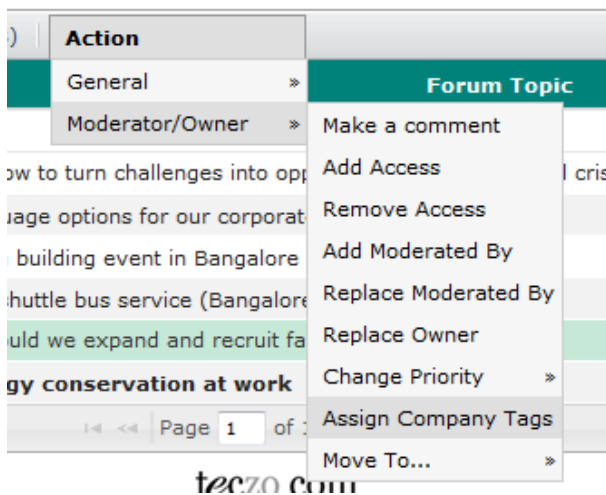
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Assign Company Tags (Moderators and Owners Only)

Moderator and Owner can assign a company tag to one or more items through the following:

1. Select one or more records or items in the summary table.
2. Click the Action dropdown selection through the state bar.
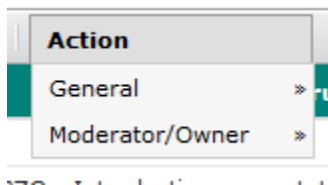
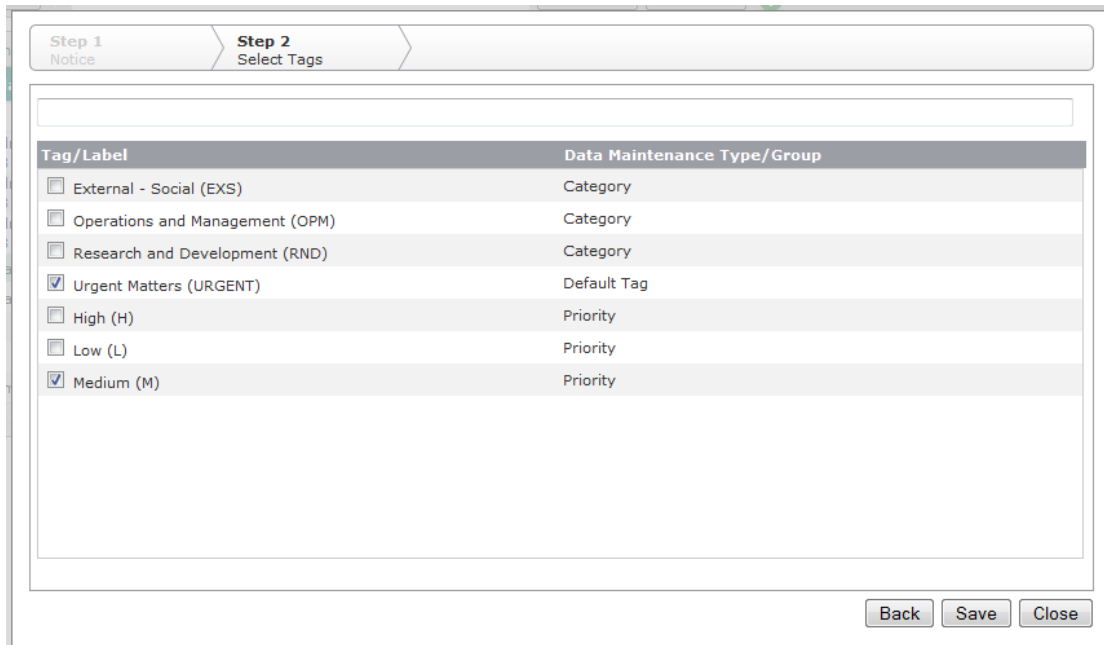3. Under Moderator/Owner selection, click the Assign Company Tags.

4. A list of records or items the user is authorized to update will be shown. Click Next.

5. Select one or more desired Tags then click Save. The user can search the list by typing characters in the search box.

6. The Tag abbreviation will be displayed in the selected records or items in the summary table. Hovering over the tag will display the tag name/description.
    Note: Company Tags are displayed with an underline.

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Removing Tags

Tags can be removed in several ways:

Removing Tags through the Details Page
1. When viewing the summary table click a record to view the details page.
2. In the details page, user can see the tags assigned for the record. Remove the tag by clicking the X at the end of every tag. (Only the Moderator and Owner can remove the Company Tags.)

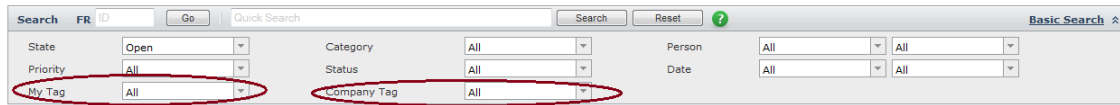### Removing Tags through Action Dropdown Selection
1. Select one or more topics in the summary table.
2. Select Assign My Tags or Company Tags through Action dropdown selection.
3. User will see the check boxes with the following:
    a. ☐ Tag is not assigned to one or more records. Checking this will assign the tag to the selected records.
    b. ☑ Tag is assigned to all of the selected records. Removing the check will remove the tag to the selected records.
    c. ◼ Tag is assigned to one or more records. Clicking once will change the shade to check and will be assigned to all the selected records.
4. Click Save to perform the desired action.

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Filtering of Tags

My Tags and Company Tags can be filtered through Advanced Search.

1. Through Advanced Search, locate the My Tags or Company Tags

2. Select one or more tags to filter and click Search.

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