Tag User Guide

Tag Actions

Add Tag

To start this action, click the   Add Tag   button above the Tag listing.

Creates a new Tag.

When this action starts a form is displayed to enter the details of the Tag.

Each field customises or controls some aspect of the Tag display or behaviour.

Some fields are required and must be entered before the Tag can be added, the required fields are Name, Item Tag, Category Tag.

Although some fields are not required, it is best practice to populate these, including .

Most fields are optional, and are often prefilled with a good default so these may not need to be changed. These optional fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

View

To start this action, select the Tag you need to work on, and click the   **View**   button in the ⋮ More Menu on that row.

Display the selected Tag.

This action displays the Tag similarly as for an Edit Action, except none of the fields are editable.

Useful for reviewing records without making any changes.

Edit

To start this action, select the Tag you need to work on, and click the ✏ button on that row.

Edits an existing Tag.

When this action starts a form is displayed with the existing Tag and any previous information entered.

Each field customises or controls some aspect of the Tag display or behaviour.

When editing it is advisable to only change what is needed and most fields may not need to be changed. These other fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

Copy

To start this action, select the Tag you need to work on, and click the ⧉ **Copy** button in the ⋮ More Menu on that row.

Copies an existing Tag.

The selected Tag is copied and the word (Copy) will be added to the name of the new Copy

Delete

To start this action, either select the Tag to work on and click the 🗑 button on that row. Or CTRL+click to select multiple Tags and click the 🗑 button above the Tag listing.

Deletes an existing Tag.

When this action starts a screen is displayed to check for Confirmation before the Action continues.

On this screen a list of warnings may be provided to show the impact of deleting this Tag.

Search

To start this action, click the 🔍 button above the Tag listing.

Allows a Search of Tags.

This allows a simple text search across all Tags.

To search a specific field select the field from the drop down list

Adv. Search

To start this action, click the 🔍 Adv. Search button above the Tag listing in the ⋮ More Menu.

Allows an Advanced Search of Tags.

The Advanced Search opens a new section at the bottom of the Tags and allows several distinct features:

- Multiple Search Lines : allows Tag matches to be identified where more than one search criteria is required

- Nested Searches : allows a combination of AND and OR logic to find results

- Saved Filters : allows a search to be saved as a Filter

- Export : allows the results of the search to be exported and worked on separately

Refresh

To start this action, click the ↻ Refresh button above the Tag listing in the ⋮ More Menu.

Refresh the list of Tags.

Allows the list of records to be refreshed.

Although the records in the system will automatically update if a another Admin is using the system at the same time, the Refresh button allows the list to be manually updated.

Export to List

To start this action, click the ☁ Export to List button above the Tag listing in the ⋮ More Menu.

Export the Tag results shown to a List.

An Export List can be downloaded as a CSV file, or through any number of customised Export Templates.

Export to List will begin the process of Exporting the Tags shown.

Once the data is exported it is available to download as a CSV file with all columns.

A list of Export Templates for Tags will be shown, select the Export Template to Print, Export to Document, Export to CSV or Email.

Before using a template an opportunity to amend the template is provided.

See Export Templates for more information on Managing Export Templates.

Export All

To start this action, click the ⤓ Export All button above the Tag listing in the ⋮ More Menu.

Export all the Tags to a List.

Exactly as for "Export to List" except rather than just Exporting the Tag results shown, all Tags will be expored.

Export Item

To start this action, select the Tag you need to work on, and click the ☁ Export Item button in the ⋮ More Menu on that row.

Export only the selected Tag to a List.

Exactly as for "Export to List" except rather than just Exporting the Tag results shown, only the selected Tag is exported.

Import Tags

To start this action, click the ☁ Import Tags button above the Tag listing in the ⋮ More Menu.

Import Tags from a CSV file

Allows a CSV file of Tags to be imported to create individual Tag records for each row.

See separate Import documentation.

Choose Columns

To start this action, click the ⚙ Choose Columns button above the Tag listing in the ⋮ More Menu.

Changes the Columns shown in the Tag Listing.

The Choose Columns screen shows the Selected Columns on the left, and the Tag Columns available on the right.

Drag and Drop column names between the two columns.

Alternatively double click on a column name to move it from one list to the other.

On the left the Selected Columns can be dragged up and down to change the ordering in the Tag Listing.

Manage Filters

To start this action, click the   ☰ Manage Filters   button above the Tag listing in the ⋮ More Menu.

Creates custom Filters for Tags.

A Filter is a saved Advanced Search. Multiple Filters can be created for Tags.

These Filters appear at the top of the Tag listing.

When the Filter is selected the results are restricted to only include those which match the Filter.

The Manage Filters action shows a list of existing Filters for Tags where these can be managed.

Tag Field Reference

Name

This field is mandatory.

The name of the tag

Item Tag

This field is mandatory.

This tag applies to content items (pages, downloads, articles, etc.). If set, this tag may be selected for content items to find items related to other items

Category Tag

This field is mandatory.

This tag applies to categories. If set, this tag may be selected for categories, to enable selected categories to be listed in listing items