Chainformation Admin User Guide
(Tags)

Last Updated: June 2, 2021

Welcome to the **Chainformation** user guide. In this manual, we will learn how to manage the **Tags** section on the **System setup** page.

Tags is a feature that allows you to categorise the content in **Chainformation,** you can compare **Tags** with a Folder, so you get the right context. The platform does not have folders per say, or other hierarchical storage; it is all defined by **Tags**. It is much like the feature "**Labels**" in **Gmail**.

Tags makes it easier for **Users** to find content based on different topics. **Tags** also provides smart functionality with automated and dynamic **Table of contents** (see separate instruction on this) and automated listing of links and shortcuts.

Tags can only be created and managed by Users with the appropriate **Role** and **Admin** level. (see separate manual on these settings)

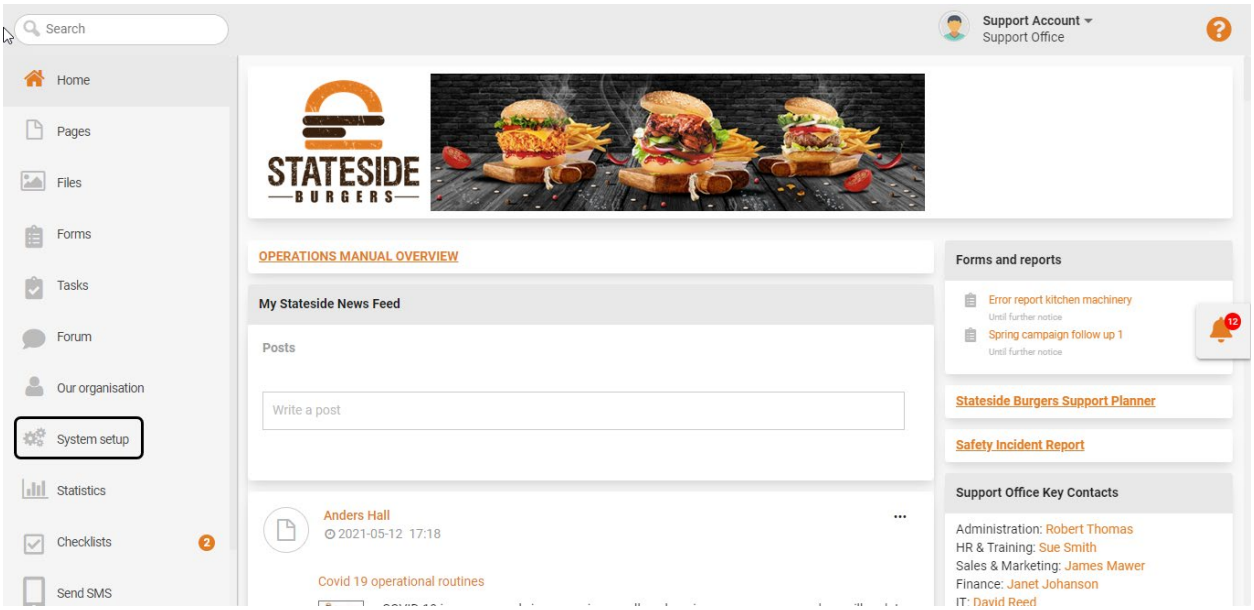
Here is a list of topics that we will discuss in this **Tags** manual.

- How to Create a New Tag
- View Your Existing Tags
- Edit a Tag
- Delete a Unit
- Manage Your Quick Selections

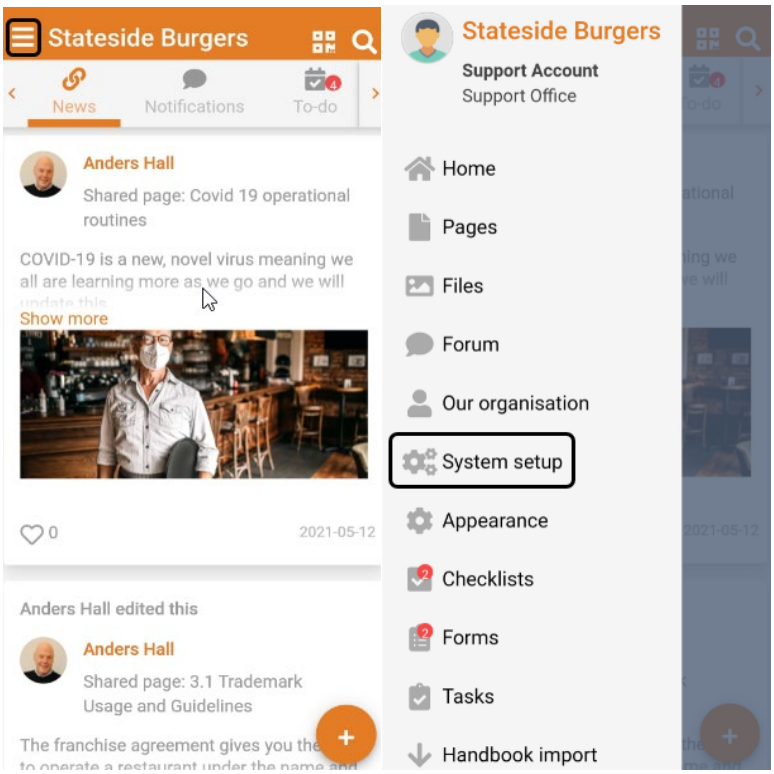
How to Create a New Tag

Once you have logged in to the **Chainformation** platform, follow these navigation steps to **create** a **new tag**.

1. Click the **System setup** button in the left-side menu to open the **System setup** page.

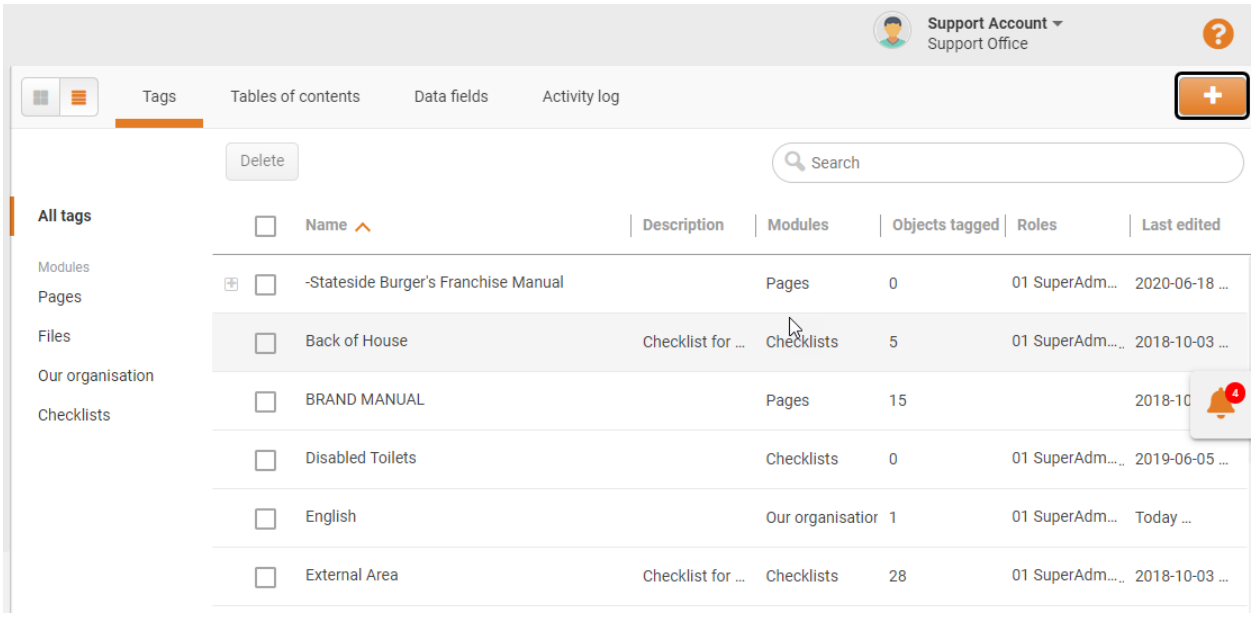


If you are accessing the platform from the **Chainformation** mobile app, you can open your profile menu by clicking the **hamburger** icon in the top-left corner of your mobile screen.



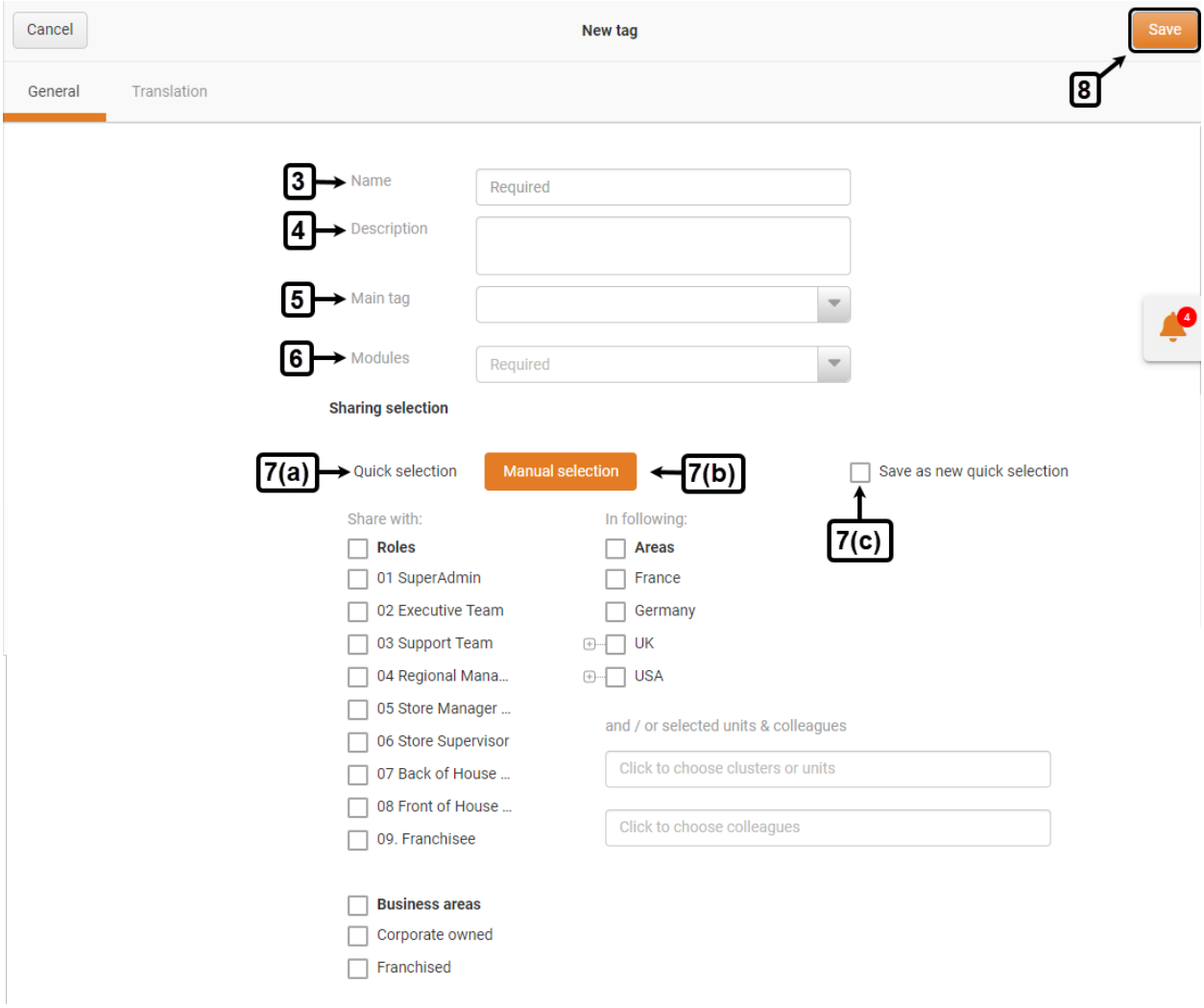
By default, you will be redirected to the **Tags** tab.

2. Click the (**+**) icon in the top-right corner of the **Tags** page to create a new tag.



This will open the **New tag** page.

On the **New tag** page, follow the navigation steps demonstrated below to create a new tag.



3. Enter the **Name** of the new tag.

4. Enter a **Description** of the new tag (if applicable).

5. Select a **Main tag** from the dropdown menu if you want to associate the new tag with an existing tag as its subcategory. This feature is mainly used together with the **"Table of Content"** feature.

Leave the **Main tag** field empty if you do not want to associate the new tag with an existing tag. The system will save the tag as a new main tag.

6. Select the **Module(s)** in which the new Tag should be available.

Note: You can select one or more modules from the dropdown menu. The dropdown menu contains the following four options:

- Checklists

- Files
- Our organisation
- Pages

7(a). Choose a **Sharing selection** of Roles, Areas, and Business areas for which the new tag will be available.
This means: For those Users that are allowed to create content, which Tags should be available for them to Tag their content. **NOTE: This setting does NOT in any way affect who will be allowed to READ the content Tagged.**

7(b). You can select these options manually by choosing the **Manual selection** option if you do not have a pre-defined Quick selection with your required options.

Note: You can also select some individual units, clusters and colleagues instead of an entire area.

If you select an area and unit/cluster simultaneously then the system will make this tag available for the selected units, clusters, or colleagues alongside the selected area.

7(c). Check the checkbox next to the **Save as new quick selection** option to save your selected options as a new quick selection for the future use. See User guide for Quick Selections

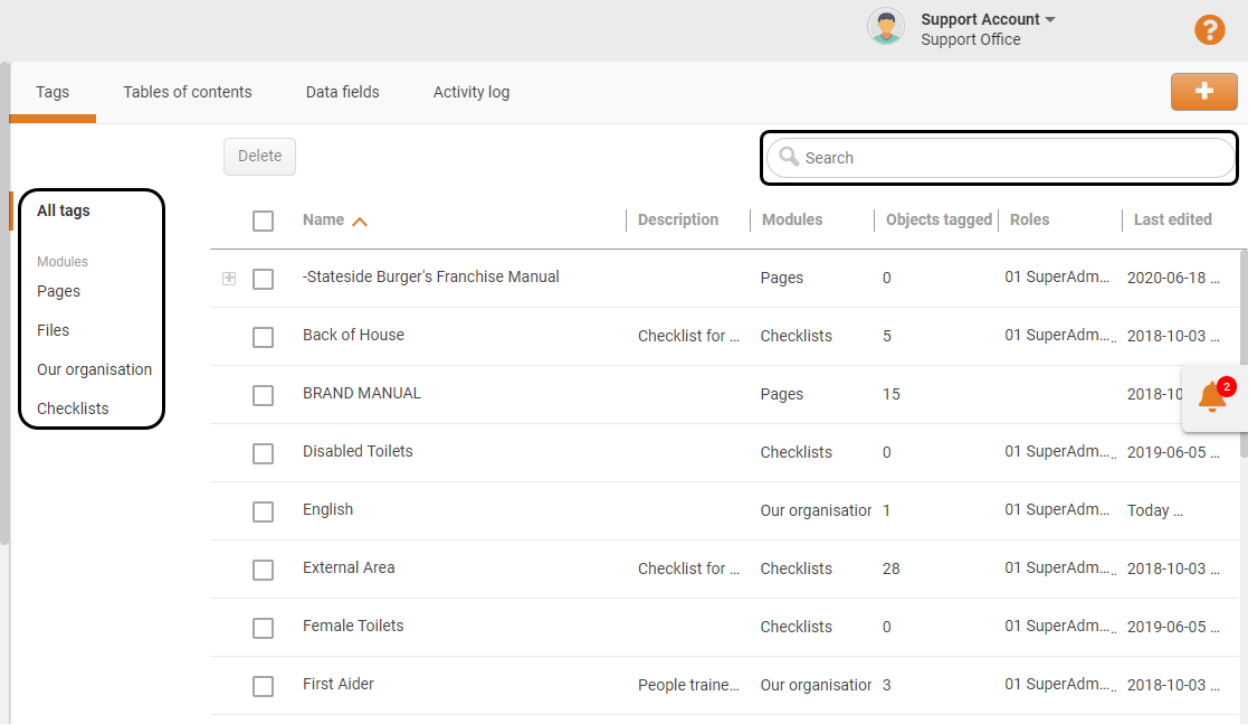
Once you have entered all the details, carefully review all the information on the **New tag** page.

Make sure you have filled all fields with the **Required** status and associate the new tag with at least one role, area/cluster/unit, and business area. Otherwise, the system will not create the new tag.

8. Enter the **Save** button in the top-right corner of the page to activate the created tag.

View Your Existing Tags

1. Access the **Tags** tab on the **System setup** page by following the navigation steps as demonstrated in the previous section.



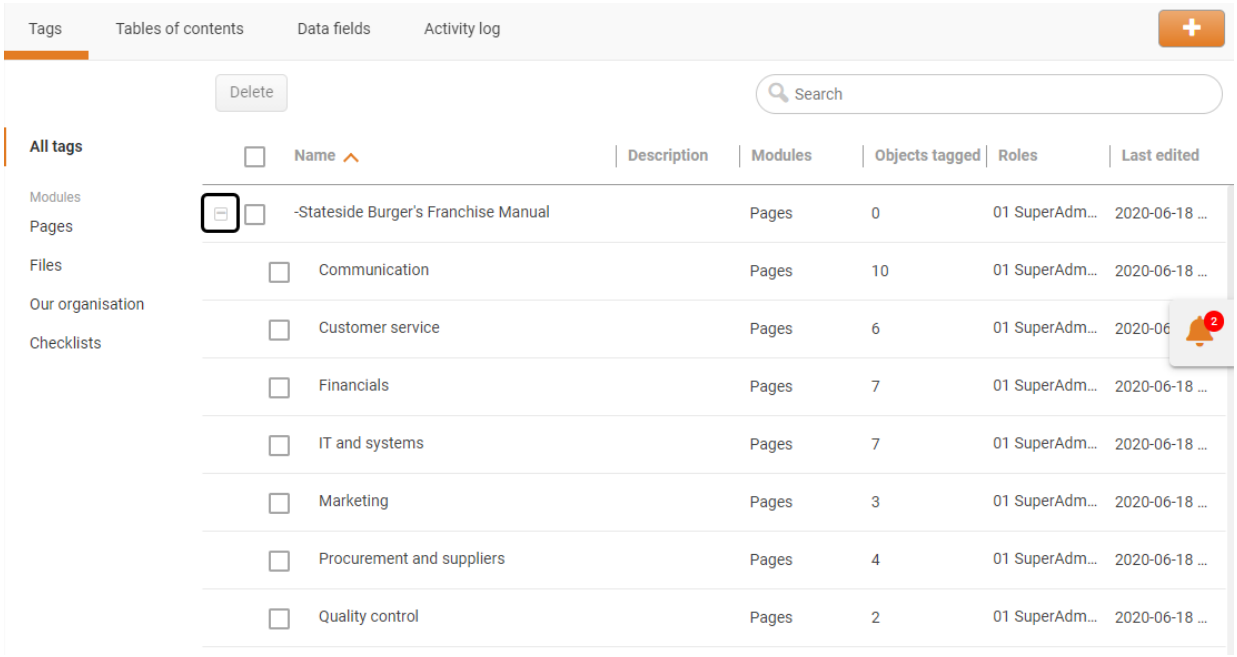
You can view all the available tags associated with different modules on the **Tags** page.

You can also use the **Search** field to find a tag based on any of the available data/information. See the User Guide for Search

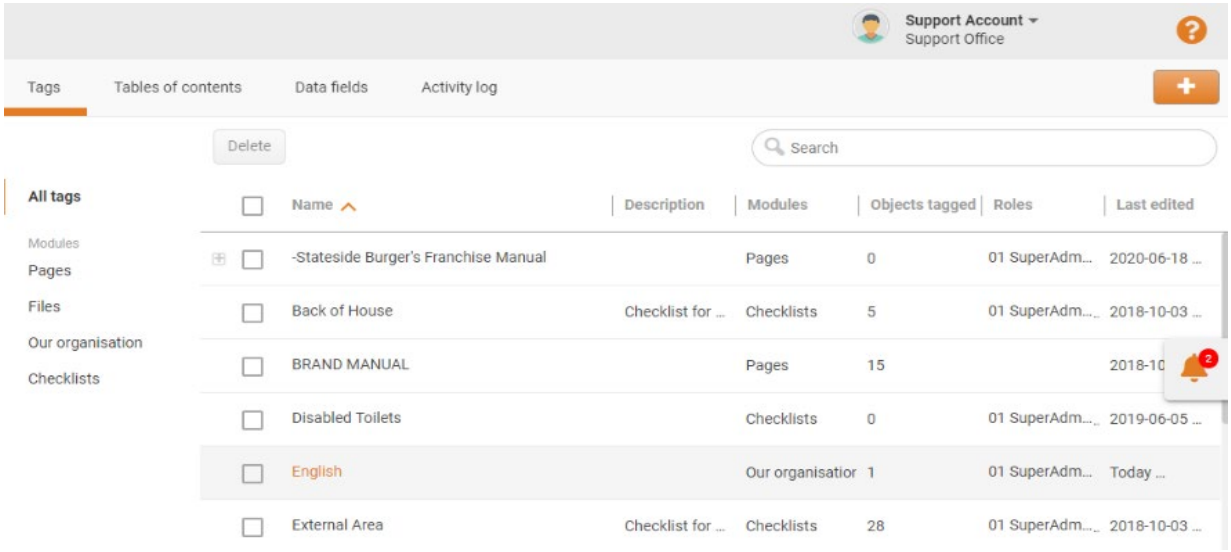
Likewise, you can view tags associated with a specific module only by clicking this module in the left side menu of the Tags page.

Note: You can view or search only those tags that are available for your role, unit, area, etc.

3. Click the **expand (+)** button next to a **main tag** to view all its **sub tags**.



4. Click the name of a tag to view its details.



This will open the **Details** tab of the selected tag where you can view all its details.

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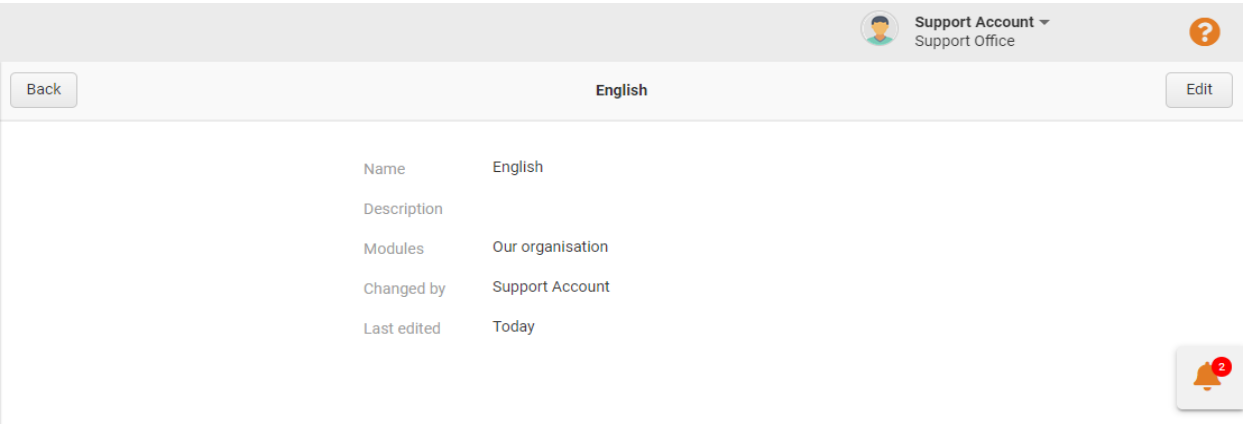
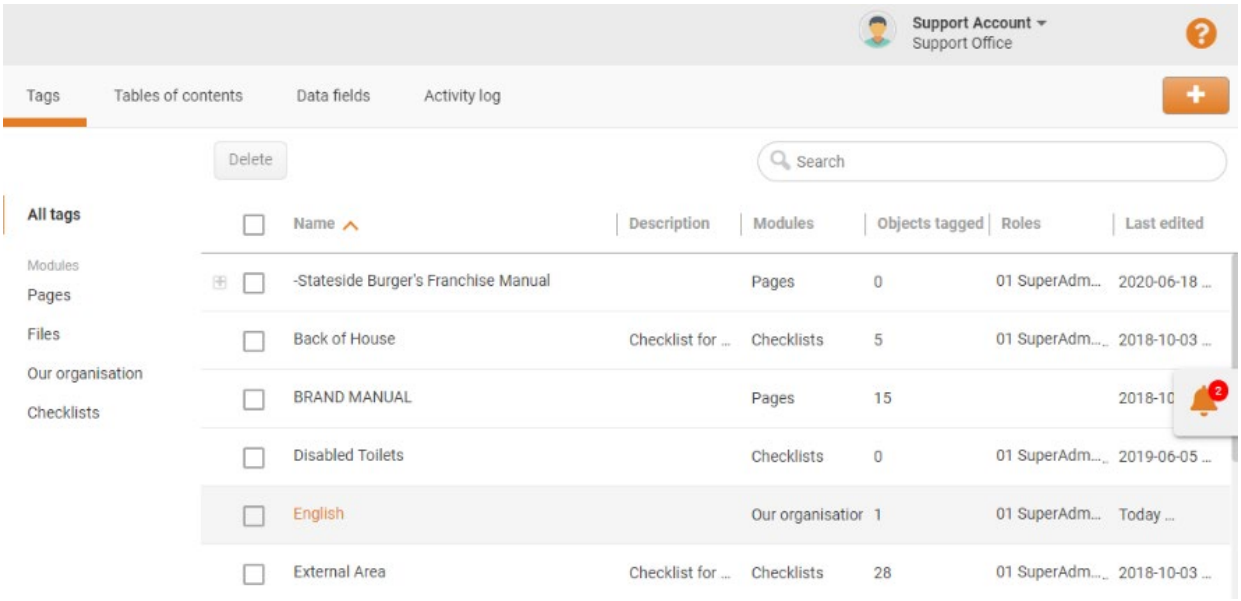


Edit a Tag

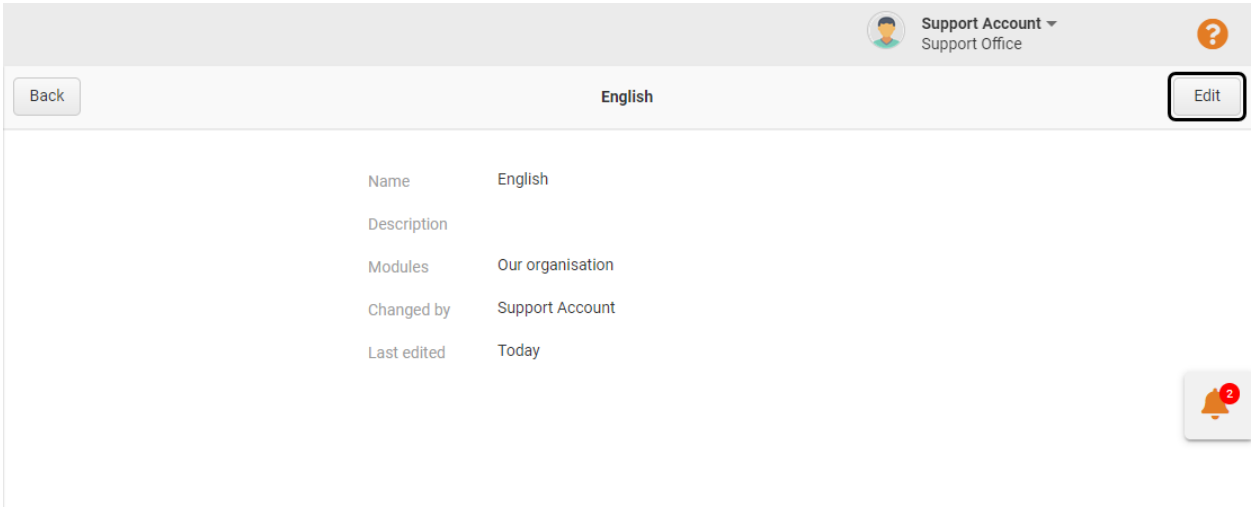
1. Access the **Tags** tab on the **System setup** page by following the navigation steps as demonstrated in the previous section.

2. On the **Tags** page, click the name of the tag you want to edit.



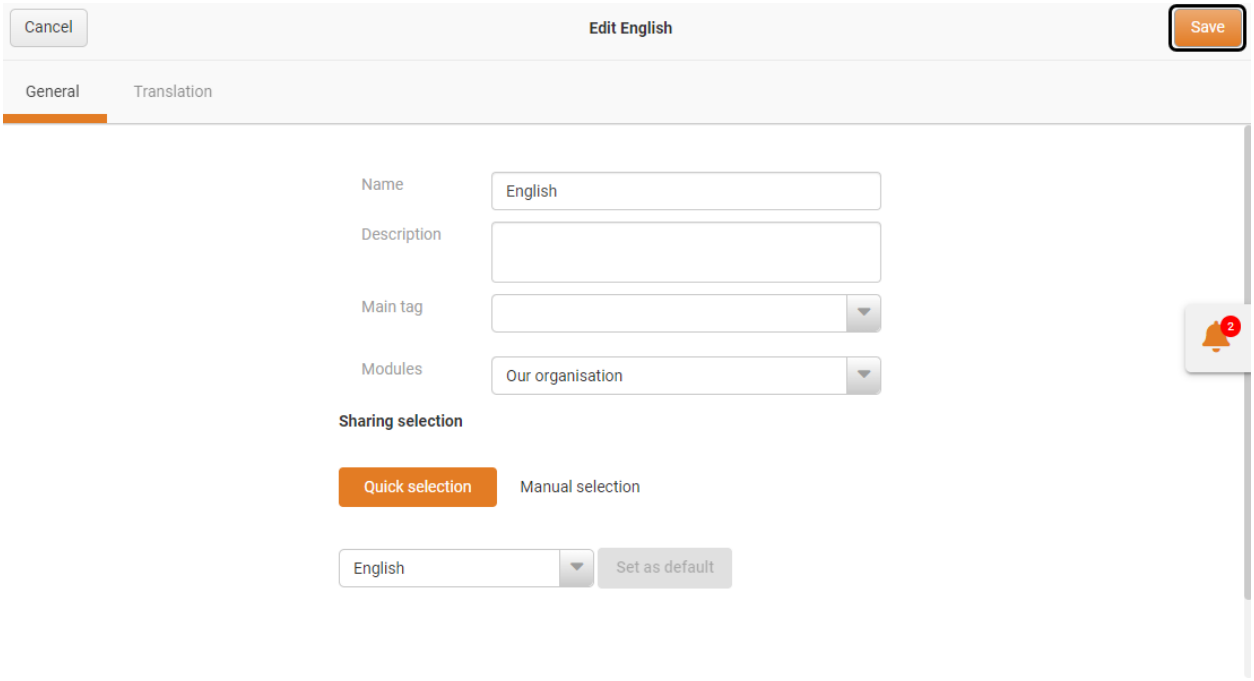
This will open the **Details** tab of the selected tag.

3. Click the **Edit** button in the top-right corner of the page to open the **Edit tag** page.



4. Update the details you want to edit in the selected tag.

5. Click the **Save** button in the top-right corner of the **Edit Tag** page to save all the information you have edited.

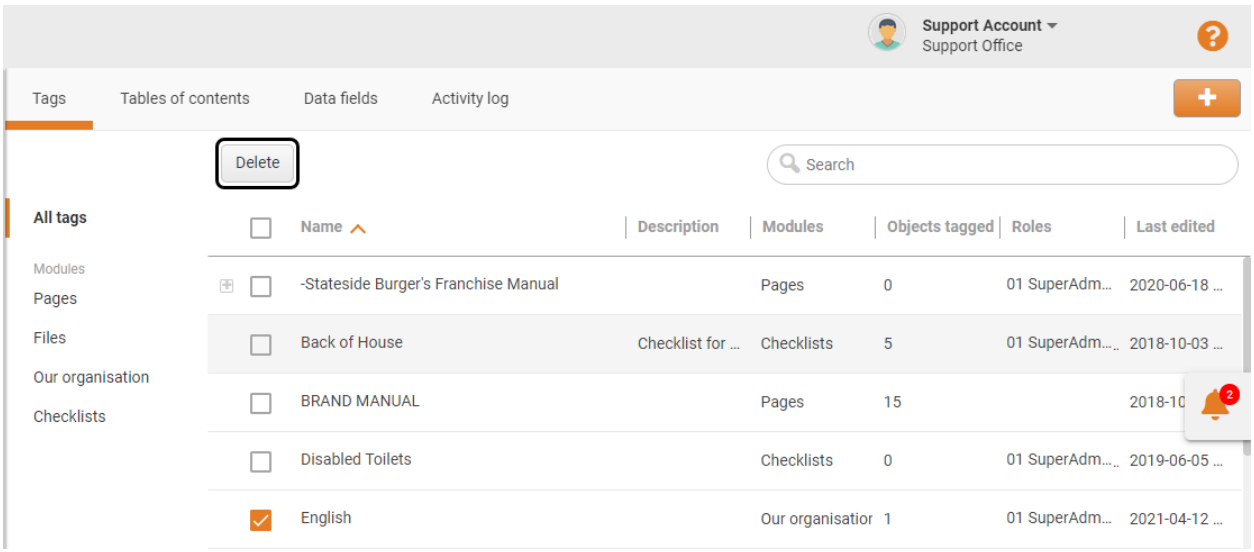


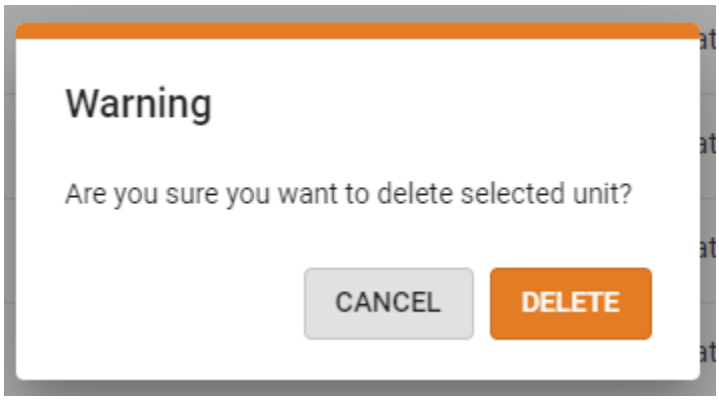
Delete a Tag

1. Access the **Tags** tab on the **System setup** page by following the navigation steps as demonstrated in the previous section.

2. On the **Tags** page, **check** the **checkbox** next to the name of the tag or tags you want to delete permanently.

3. Click the **Delete** button above the tags list.



4. Click the **DELETE** button in the pop-up message shown on the screen to delete the selected tags.

NOTE: When you DELETE a Tag, it will be deleted from all across the platform, and this action CANNOT be reversed. However, your content will not be deleted or affected in any way.