

# 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)

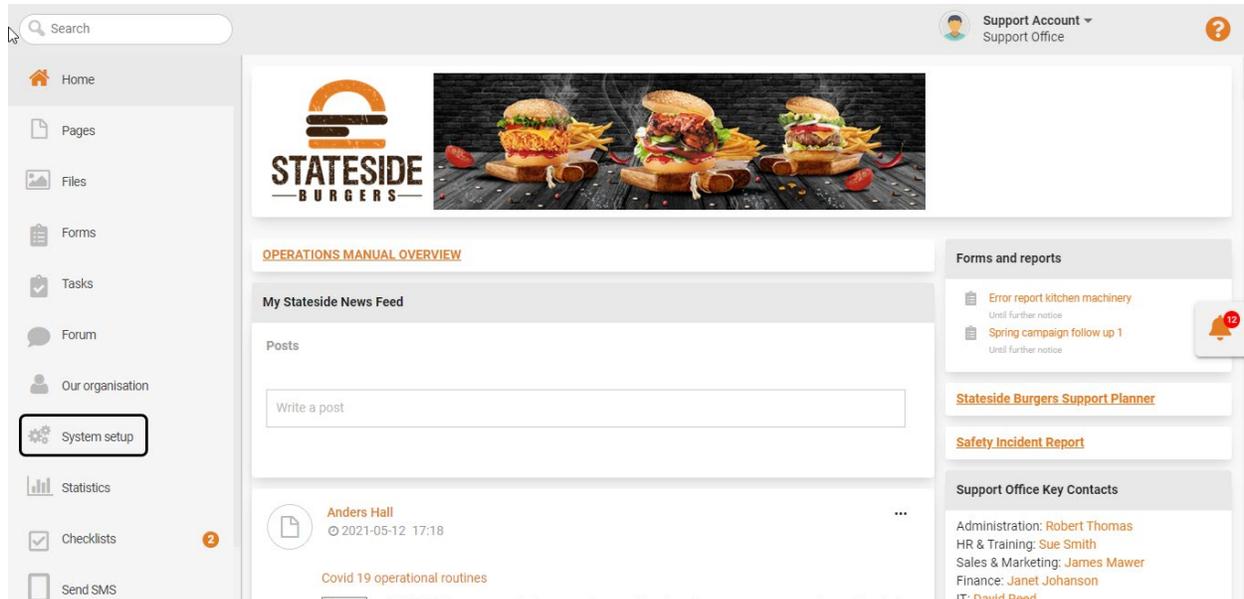
Here is a list of topics that we will discuss in this **Tags** manual.

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

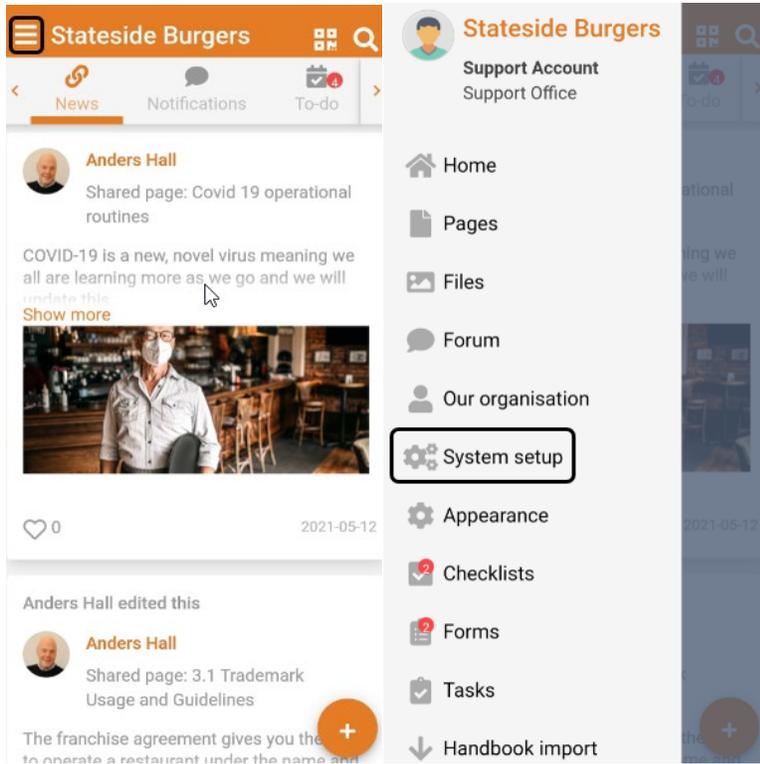
## How to Create a New Tag

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.

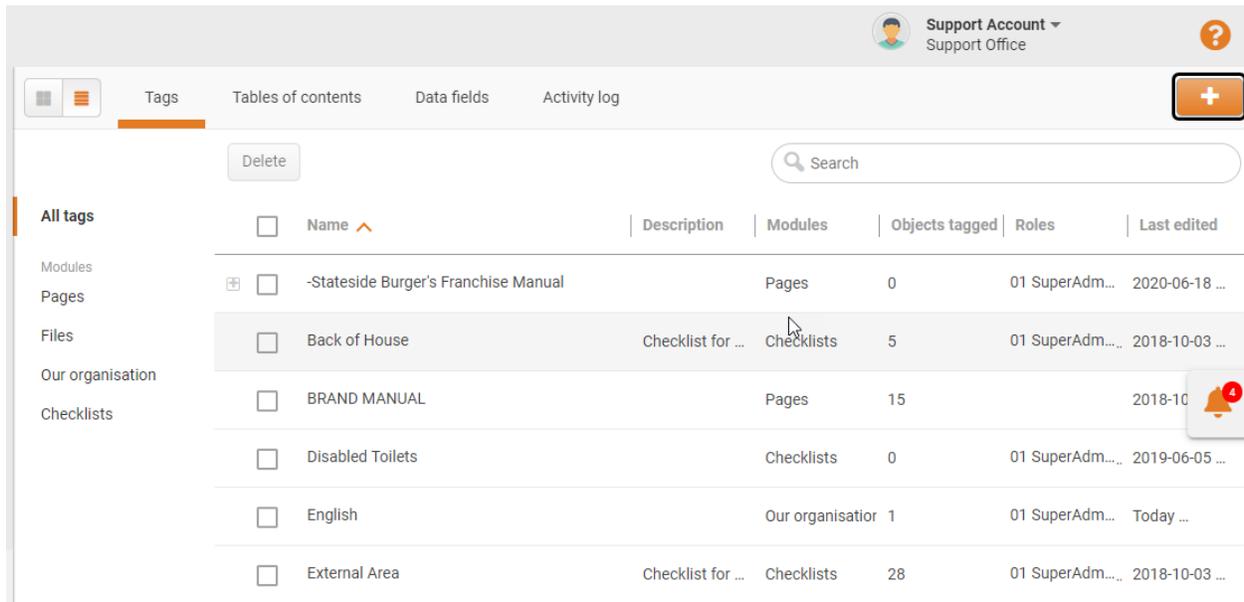


If you are accessing the platform from the **Chainformation** mobile app, you can open your profile menu by clicking the **hamburger** icon in the top-left corner of your mobile screen.



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.

<https://chainformation.com/userguides>

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.

The screenshot displays the 'Tags' page in the Chainformation system. At the top right, there is a user profile for 'Support Account' and a 'Support Office' dropdown. Below this, navigation tabs include 'Tags', 'Tables of contents', 'Data fields', and 'Activity log'. A 'Delete' button and a search bar are positioned above the table. The table lists various tags such as '-Stateside Burger's Franchise Manual', 'Back of House', 'BRAND MANUAL', 'Disabled Toilets', 'English', 'External Area', 'Female Toilets', and 'First Aider'. A left-hand menu is highlighted with a box, showing 'All tags' and sub-categories like 'Modules', 'Pages', 'Files', 'Our organisation', and 'Checklists'. A notification bell icon with a '2' is visible on the right side of the table.

Name	Description	Modules	Objects tagged	Roles	Last edited
-Stateside Burger's Franchise Manual		Pages	0	01 SuperAdm...	2020-06-18 ...
Back of House	Checklist for ...	Checklists	5	01 SuperAdm...	2018-10-03 ...
BRAND MANUAL		Pages	15		2018-10 ...
Disabled Toilets		Checklists	0	01 SuperAdm...	2019-06-05 ...
English		Our organisator	1	01 SuperAdm...	Today ...
External Area	Checklist for ...	Checklists	28	01 SuperAdm...	2018-10-03 ...
Female Toilets		Checklists	0	01 SuperAdm...	2019-06-05 ...
First Aider	People traine...	Our organisator	3	01 SuperAdm...	2018-10-03 ...

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**.

Tags Tables of contents Data fields Activity log +

Delete Search

All tags	<input type="checkbox"/> Name ^	Description	Modules	Objects tagged	Roles	Last edited
Modules	<input type="checkbox"/> -Stateside Burger's Franchise Manual		Pages	0	01 SuperAdm...	2020-06-18 ...
Pages	<input type="checkbox"/> Communication		Pages	10	01 SuperAdm...	2020-06-18 ...
Files	<input type="checkbox"/> Customer service		Pages	6	01 SuperAdm...	2020-06-18 ...
Our organisation	<input type="checkbox"/> Financials		Pages	7	01 SuperAdm...	2020-06-18 ...
Checklists	<input type="checkbox"/> IT and systems		Pages	7	01 SuperAdm...	2020-06-18 ...
	<input type="checkbox"/> Marketing		Pages	3	01 SuperAdm...	2020-06-18 ...
	<input type="checkbox"/> Procurement and suppliers		Pages	4	01 SuperAdm...	2020-06-18 ...
	<input type="checkbox"/> Quality control		Pages	2	01 SuperAdm...	2020-06-18 ...

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

Support Account Support Office ?

Tags Tables of contents Data fields Activity log +

Delete Search

All tags	<input type="checkbox"/> Name ^	Description	Modules	Objects tagged	Roles	Last edited
Modules	<input type="checkbox"/> -Stateside Burger's Franchise Manual		Pages	0	01 SuperAdm...	2020-06-18 ...
Pages	<input type="checkbox"/> Back of House	Checklist for ...	Checklists	5	01 SuperAdm...	2018-10-03 ...
Files	<input type="checkbox"/> BRAND MANUAL		Pages	15		2018-10-03 ...
Our organisation	<input type="checkbox"/> Disabled Toilets		Checklists	0	01 SuperAdm...	2019-06-05 ...
Checklists	<input type="checkbox"/> English		Our organisation	1	01 SuperAdm...	Today ...
	<input type="checkbox"/> External Area	Checklist for ...	Checklists	28	01 SuperAdm...	2018-10-03 ...

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



Back

English

Edit

Name	English
Description	
Modules	Our organisation
Changed by	Support Account
Last edited	Today



## 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.

	Name	Description	Modules	Objects tagged	Roles	Last edited
Modules	-Stateside Burger's Franchise Manual		Pages	0	01 SuperAdm...	2020-06-18 ...
Pages	Back of House	Checklist for ...	Checklists	5	01 SuperAdm...	2018-10-03 ...
Files	BRAND MANUAL		Pages	15		2018-10 ...
Our organisation	Disabled Toilets		Checklists	0	01 SuperAdm...	2019-06-05 ...
Checklists	English		Our organisation	1	01 SuperAdm...	Today ...
	External Area	Checklist for ...	Checklists	28	01 SuperAdm...	2018-10-03 ...

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

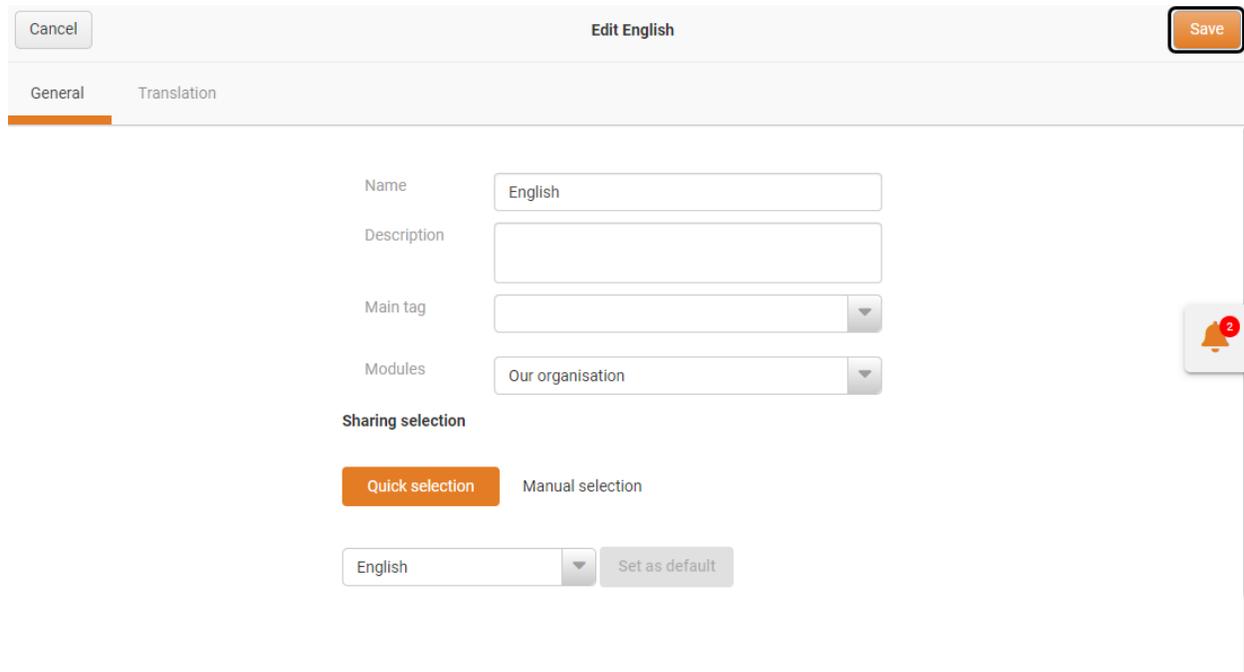
3. Click the **Edit** button in the top-right corner of the page to open the **Edit tag** page.

Back English Edit

Name	English
Description	
Modules	Our organisation
Changed by	Support Account
Last edited	Today

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.



Cancel Edit English Save

General Translation

Name English

Description

Main tag

Modules Our organisation

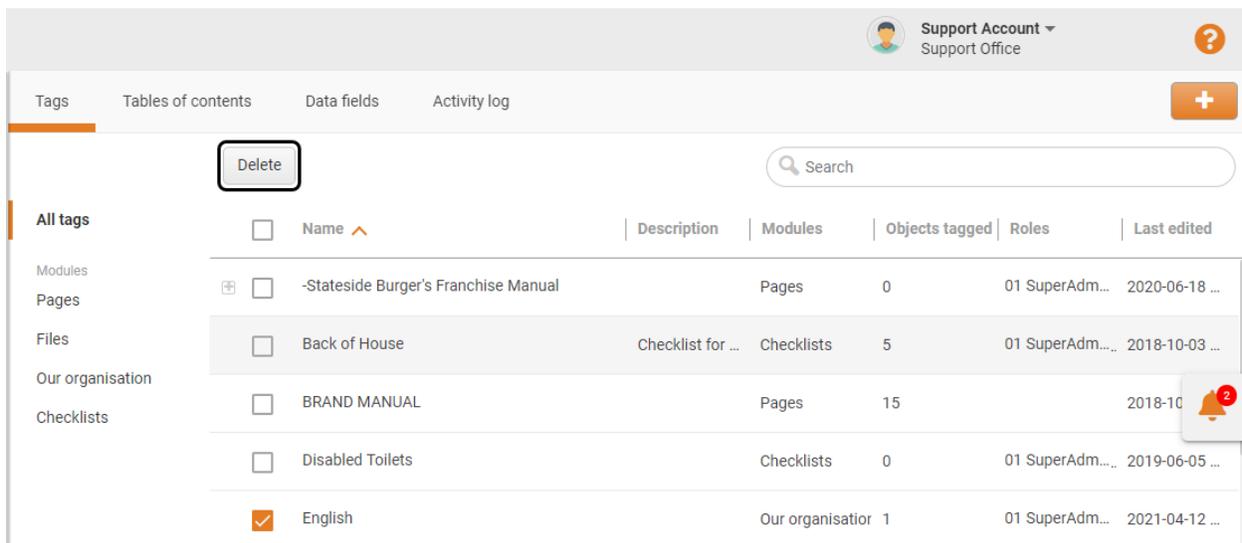
Sharing selection

Quick selection Manual selection

English Set as default

## 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.



	Name ^	Description	Modules	Objects tagged	Roles	Last edited
Modules	<input type="checkbox"/>	-Stateside Burger's Franchise Manual	Pages	0	01 SuperAdm...	2020-06-18 ...
Pages	<input type="checkbox"/>	Back of House	Checklist for ...	Checklists	5	01 SuperAdm... 2018-10-03 ...
Files	<input type="checkbox"/>	BRAND MANUAL	Pages	15		2018-10 ...
Our organisation	<input type="checkbox"/>	Disabled Toilets	Checklists	0	01 SuperAdm...	2019-06-05 ...
Checklists	<input checked="" type="checkbox"/>	English	Our organisatio	1	01 SuperAdm...	2021-04-12 ...

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.**

