

How to Create and Utilize User Defined Tags

Overview:

Tags are a filtering tool used to modify the output of reports. When a specific tag (or Tag Filter) is selected on a report control panel, only individuals that have been associated with that tag definition will appear in the report output.

Procedure for Defining a New Tag:

- 1) Navigate to the Tag Filtering area of the Personal Folder Administration Panel;
 - a. Open the database with Staff or Administrator level permissions;
 - b. Navigate to the Personal Folders module;
 - c. Click on the “Admin Tools” button to open the Administration Panel;
- 2) Click on the ‘Tag Definition’ button to open the ‘Tag Definitions’ table;

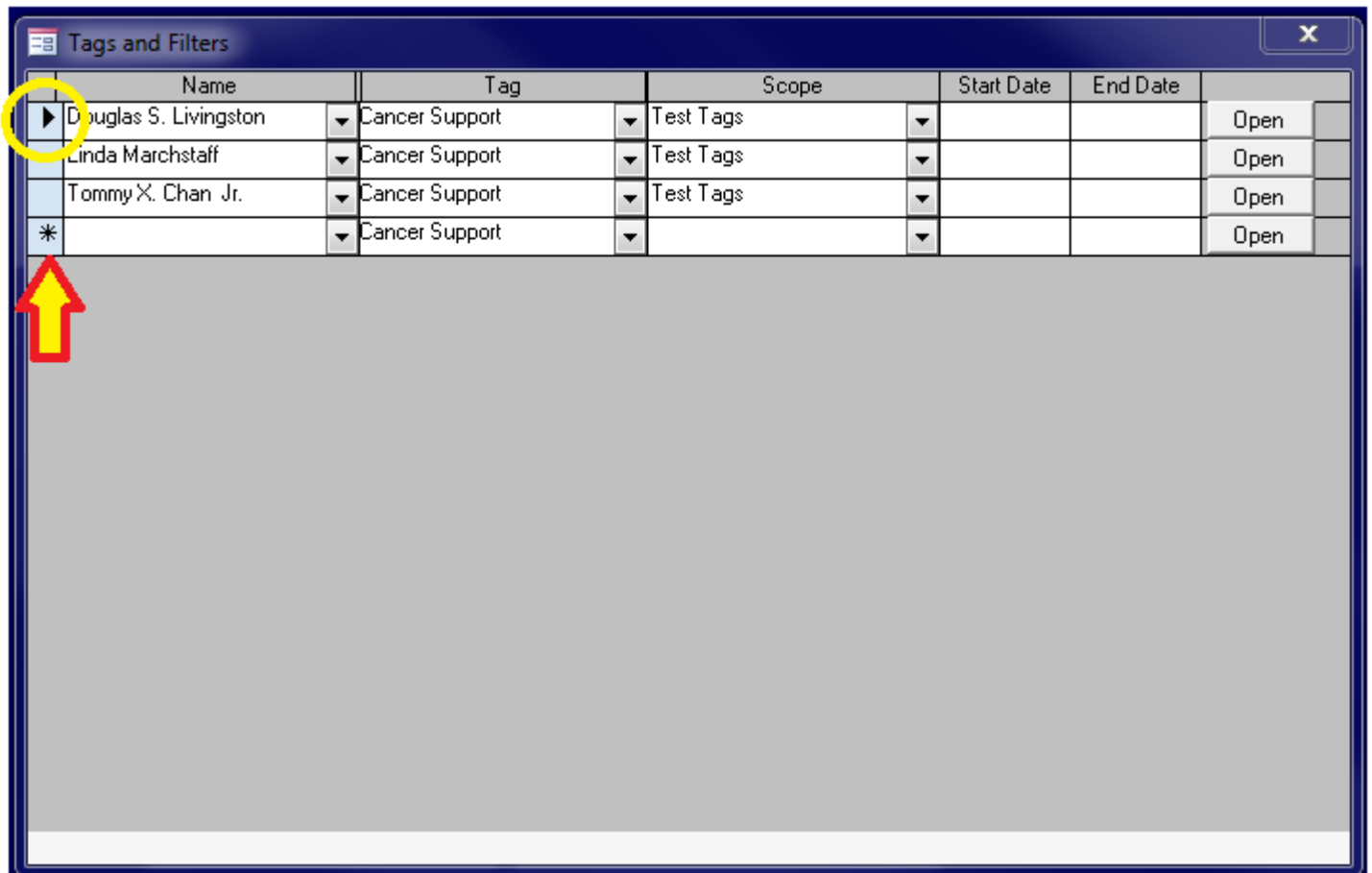
The screenshot displays the 'Personal Folders' interface. At the top, there is a header bar with 'Personal Folders' on the left and 'Reporting Sub-Group' set to 'Your Clubhouse' on the right. Below this is a yellow sidebar with buttons for 'Show Main Menu', 'Data Entry', 'Reports', 'Contact Management', 'Admin. Tools', 'Active Status', and 'Help'. The main content area is titled 'Administration Panel' and contains several buttons: 'Emergency Data Status', 'Missing Data', 'Duplicate Data', and 'Edit User Interface'. A 'Tag Filtering' section is highlighted with a blue bar and contains a 'Tag Definition' button with a question mark, which is pointed to by a red arrow. Below this is a 'Tag Assignment' dropdown menu. A 'Change Affiliations' section is also visible with a dropdown menu currently set to 'Everyone'.

- 3) Create a new tag in the new record (starred, last line) area of the Tag Definition table.

- a. Assign a Scope. This field is required, but is for organizational purposes only.
 - b. Assign a Tag Name. Make sure it relates to the planned use of the tag, and make sure that the Assignment Name and Selection Name columns contain exactly the same name.
 - c. Other fields are optional.
- 4) Additional Tag Definition Help and a Video can be found on the “Advanced” tab of database help.

Managing Tags:

- 1) Manage by Tag (Work with a list of all names that are pointed to by a specific tag.)
 - a. Navigate to the Tag Filtering area of the Personal Folder Administration Panel;
 - b. Select the specific tag that you wish to manage in the ‘Tag Assignment’ pull down menu.
 - c. To delete a tag, right click on the record selector (circled in yellow). Select ‘Delete’ on the keyboard



	Name	Tag	Scope	Start Date	End Date	
▶	Douglas S. Livingston	▼ Cancer Support	▼ Test Tags			Open
	Linda Marchstaff	▼ Cancer Support	▼ Test Tags			Open
	Tommy X. Chan Jr.	▼ Cancer Support	▼ Test Tags			Open
*		▼ Cancer Support	▼			Open

- d. To add a tag, use the bottom, starred record to enter new information.

- 2) Manage by Person (Work with a list of all tags that are pointing to a specific person.)
 - a. Open the individual's personal folder and click on the 'Tags' tab to view and/or work with a list of all tags pointing to this person.
 - b. To delete a tag, right click on the record selector. Select 'Delete' on the keyboard.

Member: Kidd, Billie Close




General Medical General Medical 2 Providers Insurance Diagnoses Meds Inpatient Care Permissions


Home Membership **Tags** Emergency Contact Education ID Income Housing Transportation

Instructions for Setting Tags:

- Tag identifiers are a powerful filtering tool that can be used to limit the individuals that appear on reports of any type, from attendance reports to mailing lists, etc.
- Tag filtered reports include only individuals for whom the appropriate tag was set during any portion of the report period.
- Start and end dates are OPTIONAL.
- A null start date is equivalent to the beginning of time.
- A null end date is equivalent to the end of time.

Tags Set for this Person:

Tag	Scope	Start Date	End Date
 Secretarial Skills	General		
Newsletter	General		
 Homeless	Program		
Keyboard Skills	Resumé		
Licensed Driver	Resumé		
Receptionist	Resumé		
Music	Test Tags		
TAYs	Test Tags		
Video Club	Test Tags		
* 			



c. To add a tag, use the bottom, starred record to enter new information.

- 3) **Test** your tags by running a name report, where you can directly observe the individuals allowed to clear the tag filter.

Utilizing Tags:

Tags are applied at report run time to filter the individuals that can appear in the output of the report. Only individuals that have been associated with a selected Tag Filter will be allowed to appear in the report output. To apply a Tag Filter to a selected report, utilize the Optional Tag Filter pull down menu found on virtually every report control panel in the Appilistic Clubhouse Database.

Control Panel

Current Enrollment Summary Report

Report Date: 6/12/2014

Applied Tag Filter: _No Tag Filter Applied

Member and Referral Selection ... ?

Active Only Everyone Inactive Only

Group results by ... ?

No Grouping Educational Advisor
 Assigned Unit Case Manager

Hide Report Notes

Help! Continue Cancel

Tag Start and End Dates: Each time that you assign a tag to an individual, you have the option of setting tag start and / or end dates. If either is set, the dates are compared with the report start and end dates. If there is any overlap, the individual will be included (if otherwise appropriate) in the report output. If there is no overlap, the individual will not be included, as if the tag was not assigned to them at all.

Tags vs. Reporting Sub-Groups: Reporting sub-groups are similar to tags in that they can be used to control who will be included in a report's output. However, they are significantly different in other regards. While all individuals will appear in reports run at the parent level, the individuals appearing in reports run in sibling sub-groups will be mutually exclusive. This trait is necessary in reports used for funding and some other administrative purposes. On the other hand, tags such as "Veterans" and "Registered Voters" can easily contain overlapping subsets of the database population.