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PowerDMS by NEOGOV

All About Tags in PowerDMS

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PowerDMS by NEOGOV

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This session will teach you:

- Where within PowerDMS you can leverage tags.
- The purpose, form and function of the tag feature.
- How to avoid overuse/misuse of the tag functionality.
- How to successfully manage your tags long term.

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A Few Things to Note:

- This session is being recorded.
- The recording will be automatically Emailed to all registrants of this session, as soon as it becomes available.
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- You can type in your questions any time within the questions field of GoToWebinar

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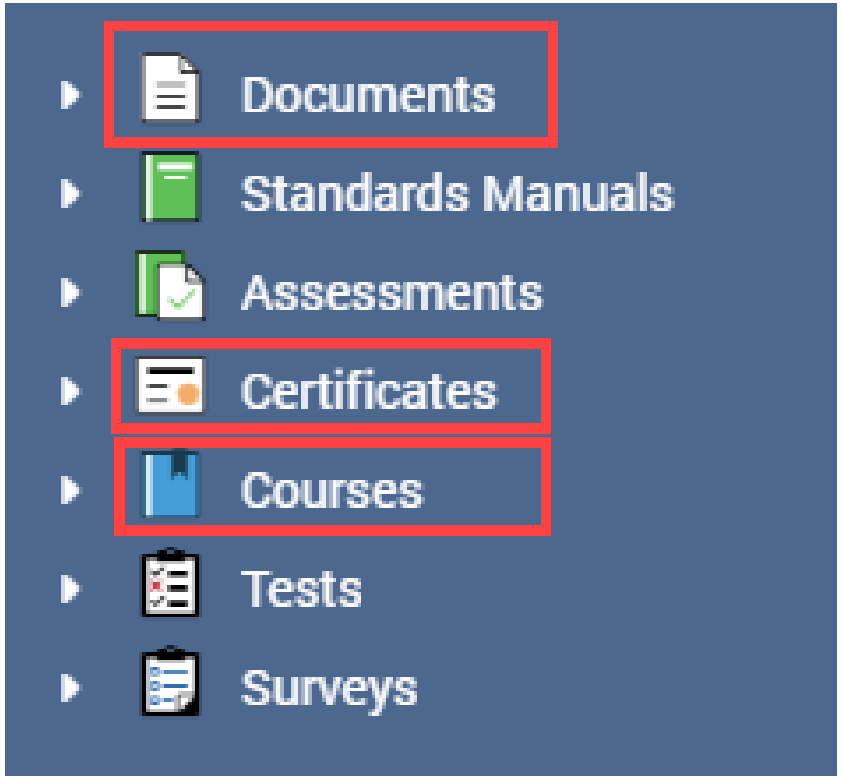
Where in PowerDMS can I use a tag?

Tags can be used on the following features:

- ✓ Documents
- ✓ Certificates
- ✓ Courses

The intention of tags is to allow an administrator to “link” separate but related content in PowerDMS.



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Pro-Tip: TAGS ARE NOT…

A key word search filter:

- Searching for key words is what your Find Anything Search field is for.

Intended to be a catch all for misspellings.

- It would be redundant and inefficient to create a tag associated with any potential misspellings of key words.

KEEP IT CLEAN, CONCISE AND TO THE POINT.

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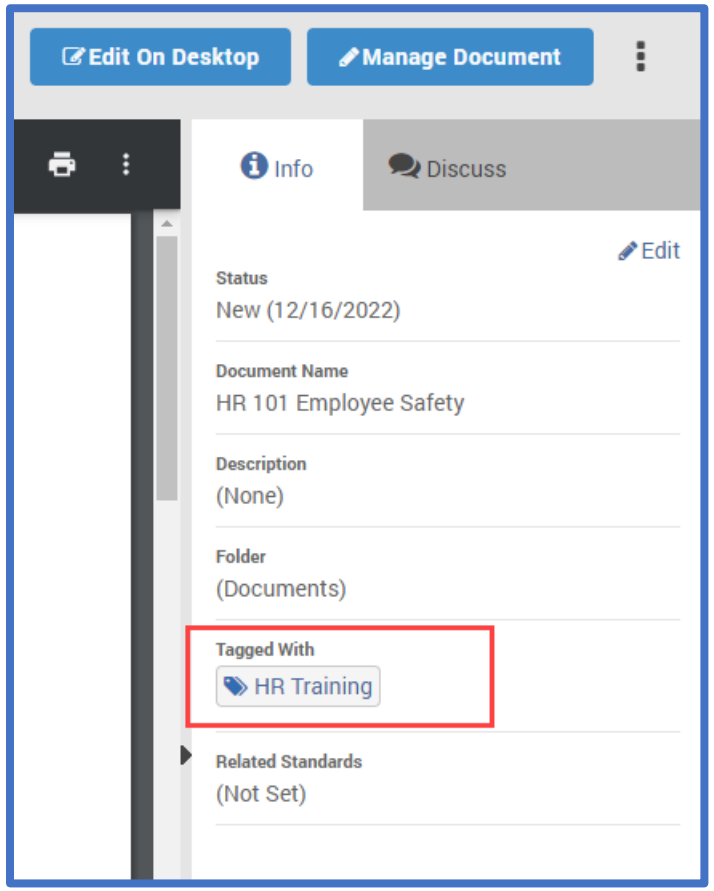
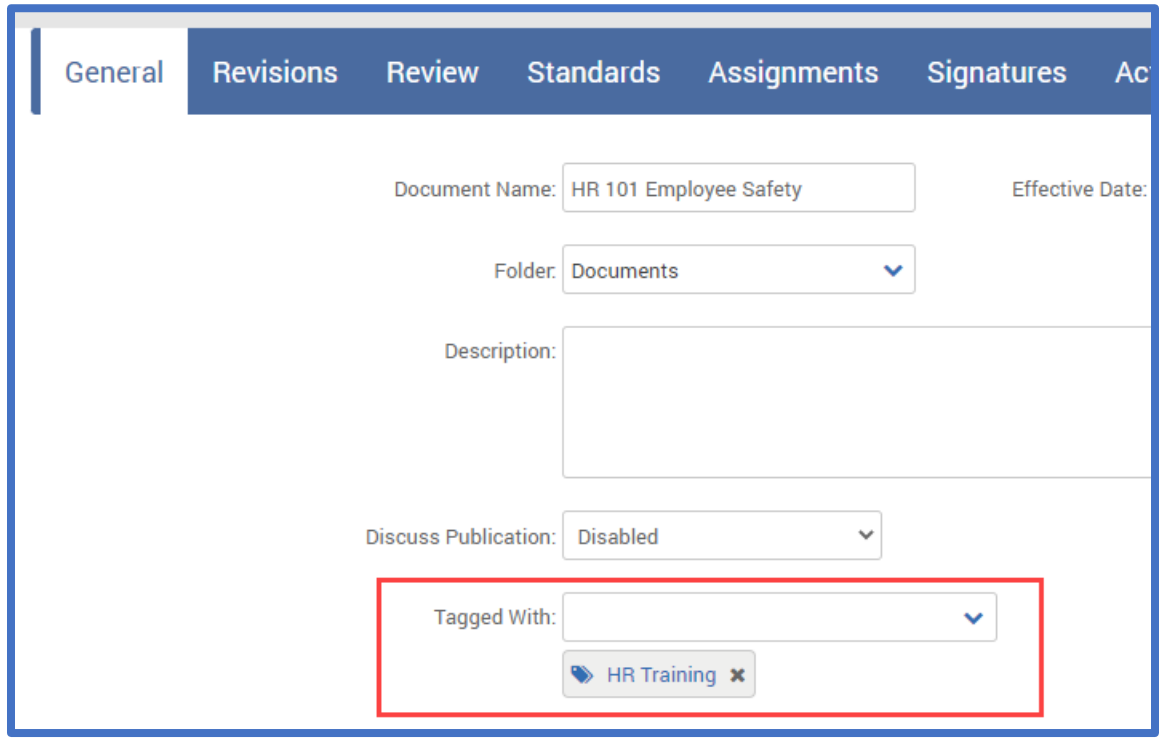
Where Do I Start Creating Document Tags?





Document Info Tab or General Tab -
Tags created will be displayed on both options.

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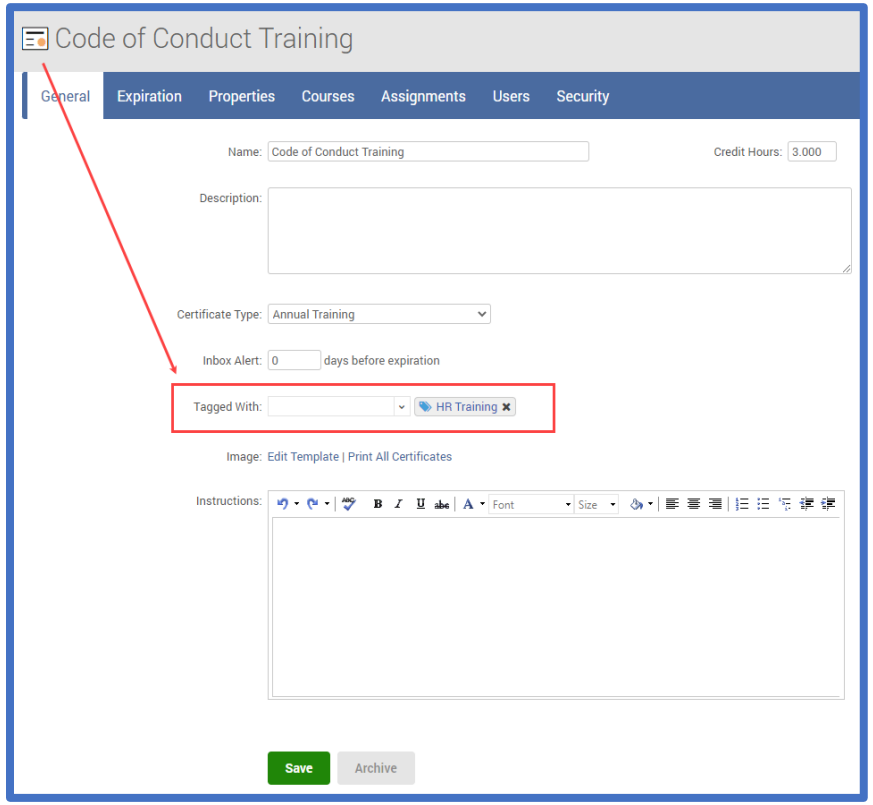
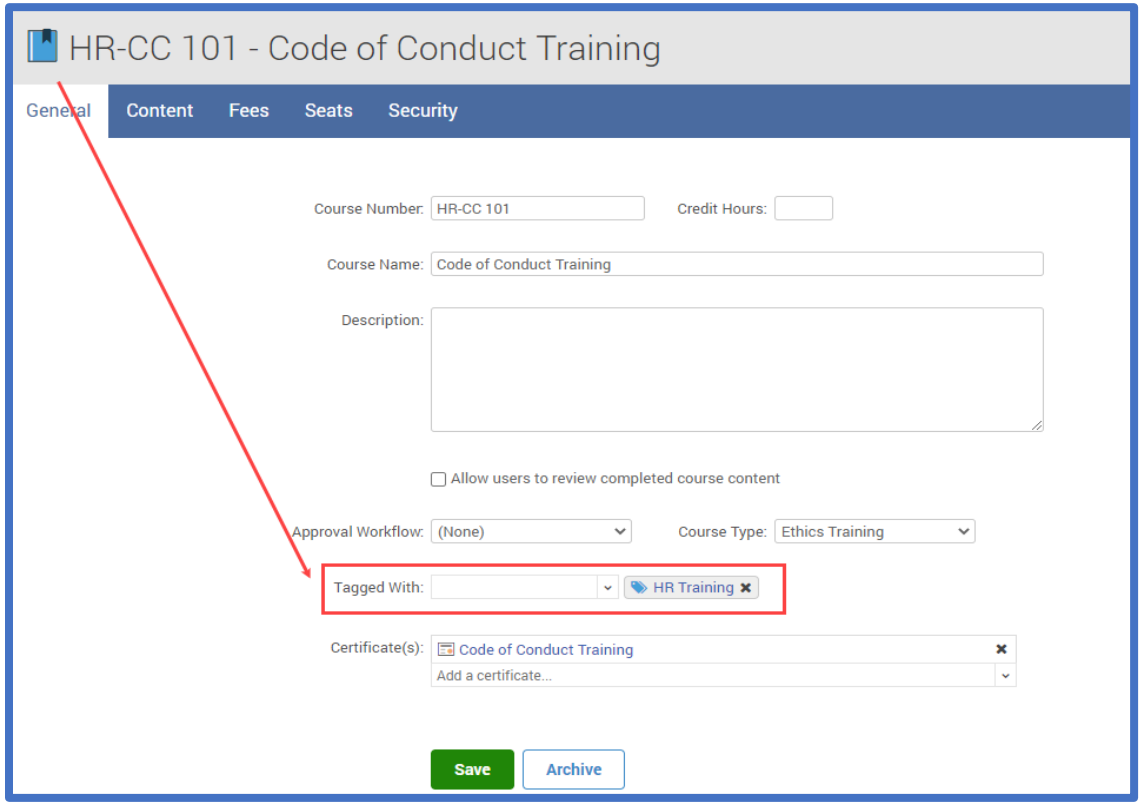
Where Do I Start Creating Training Tags?





General Tab of either the related certificate or course.

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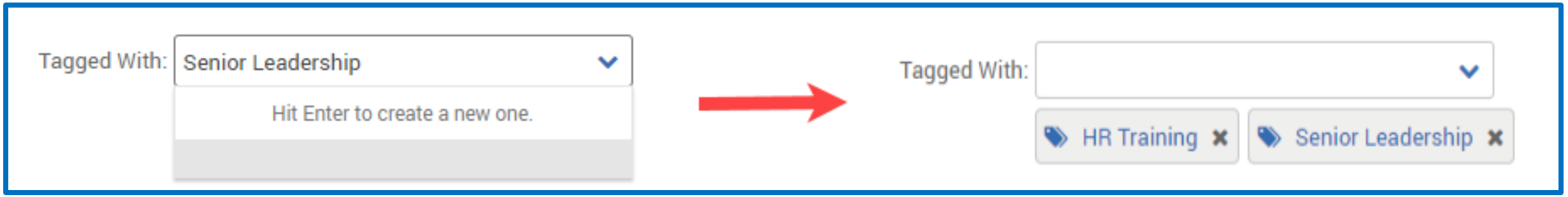
Pro-Tip:

When selecting the tag field, type in a few letters to ensure your intended tag hasn't already been created in your site.

If it has, select it – AVOID REDUNDANCIES



If it hasn't, complete the tag name (ensuring accuracy in spelling) and hit ENTER to create the new tag. Once save is selected on the management tab, the tag can be repurposed throughout your site.

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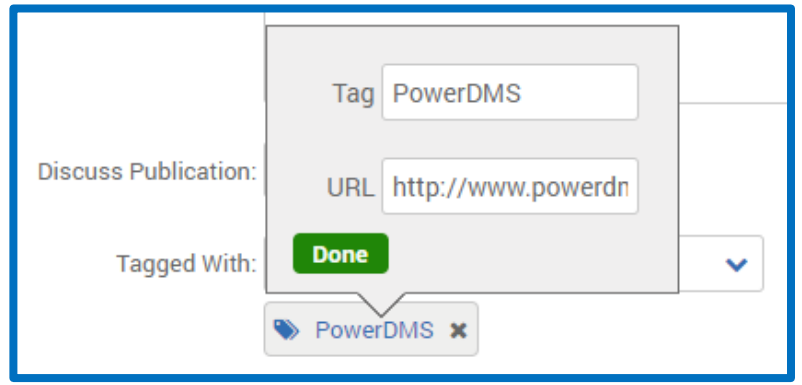
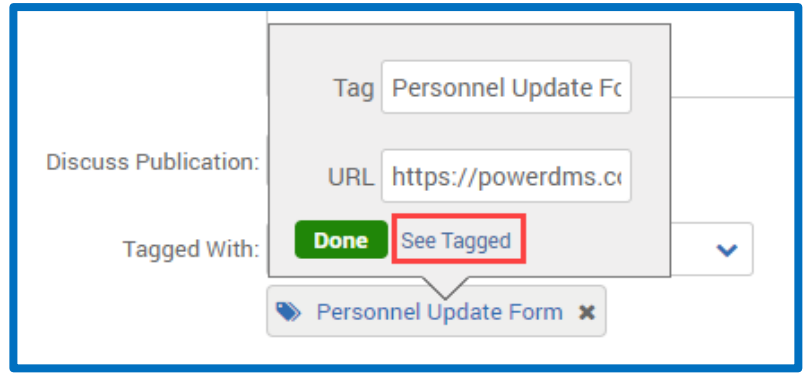
What else can a tag support?

Tags can:

- ✓ Pivot a user to an external website with the use of an embedded URL.



- ✓ Pivot a user to additional, supplemental documentation (ie related forms).



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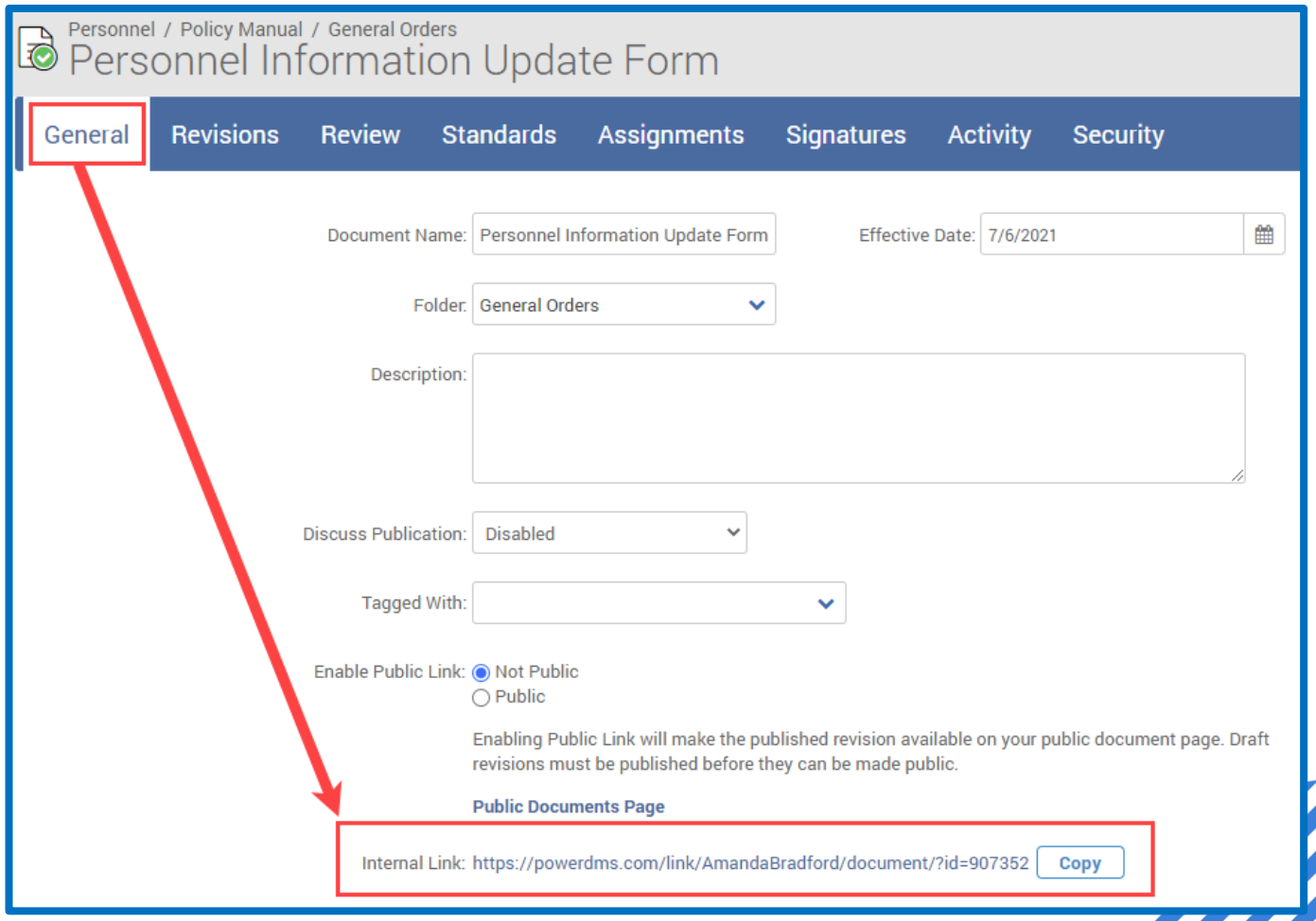
Pro-Tip: Tagging Forms

ALWAYS USE THE INTERNAL LINK, located on the general tab of the form you wish to embed within the tag.

Add the copied link to the URL field of the tag, then use that tag on the document the form is associated with.

This will ensure ease of navigation from document to form for your users, and long-term validity of the tag.



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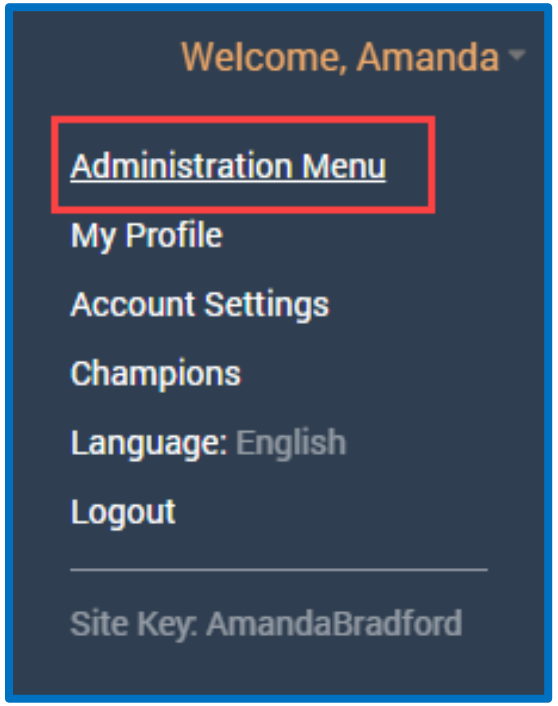
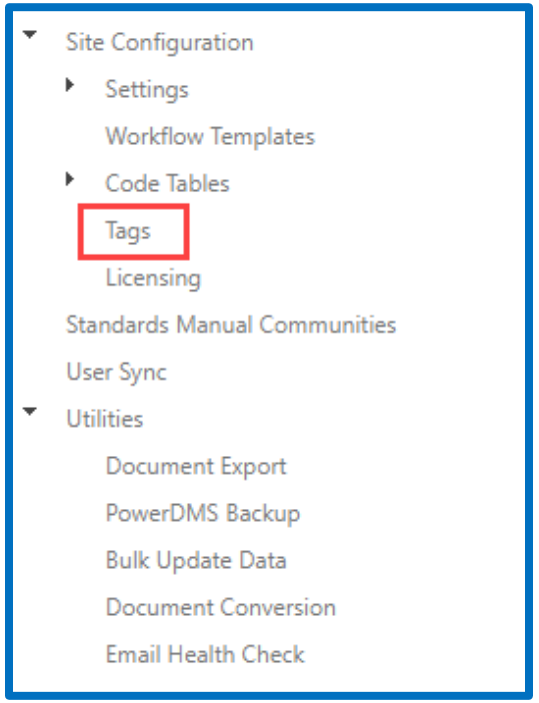
Managing Your Tags

Locate the TAGS section of the Administration Menu, this is where all your tags will be managed long-term.





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Managing Your Tags

Edit the naming conventions or add URLs to the tag with the use of the icon on the existing tag from the display.

- Any updates will apply to wherever the tag has been used, throughout the site.

Delete any old/outdated tags no longer purposeful with the use of the icon on the existing tag from the display.

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You Should Now Know:

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- How to avoid overuse/misuse of the tag functionality.
- How to successfully manage your tags long term.

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Resources

Understanding Tags

Linking Documents
(See Linking Your Form/Document to Document Tags section)

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