





All About Tags in PowerDMS

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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.



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.
- You can and should download a copy of this presentation from the Handouts section of the GoToWebinar sidebar.
- You can type in your questions any time within the questions field of GoToWebinar

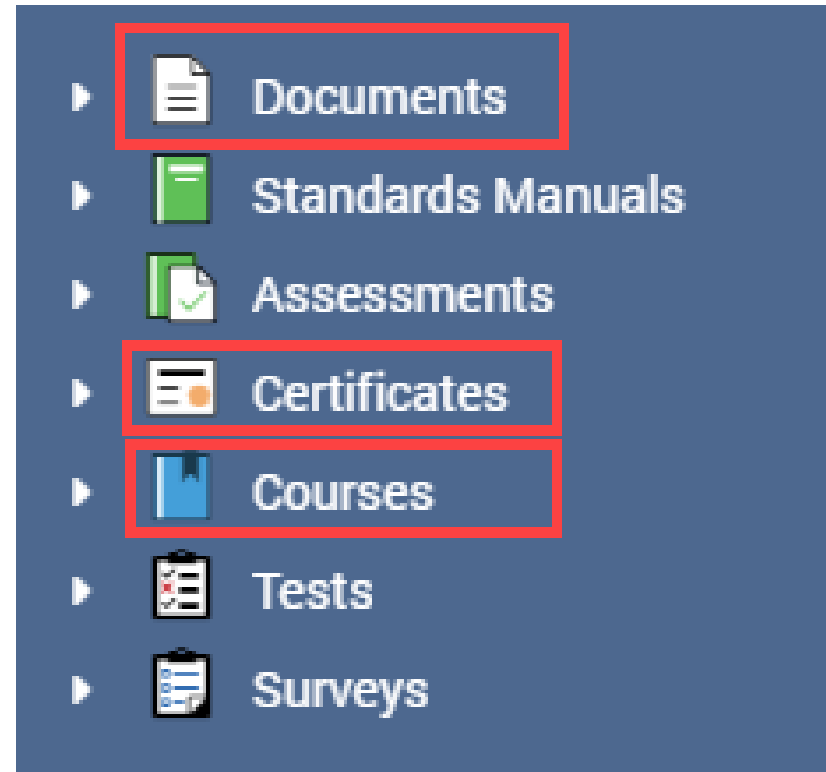


Where in PowerDMS can I use a tag?

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.



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.

Where Do I Start Creating Document Tags?

This screenshot shows the 'Info' tab of a document in PowerDMS. The document is titled 'HR 101 Employee Safety' and is currently 'New' as of 12/16/2022. It is located in the 'Documents' folder. The 'Tagged With' section is highlighted with a red box and shows a single tag: 'HR Training'. Other fields include 'Description' (None) and 'Related Standards' (Not Set).

Edit On Desktop **Manage Document**

Info **Discuss** **Edit**

Status
New (12/16/2022)

Document Name
HR 101 Employee Safety

Description
(None)

Folder
(Documents)

Tagged With
HR Training

Related Standards
(Not Set)

This screenshot shows the 'General' tab of a document in PowerDMS. The document is titled 'HR 101 Employee Safety' and is currently 'New' as of 12/16/2022. It is located in the 'Documents' folder. The 'Tagged With' section is highlighted with a red box and shows a single tag: 'HR Training'. Other fields include 'Description' (None) and 'Related Standards' (Not Set).

General **Revisions** **Review** **Standards** **Assignments** **Signatures** **Ac**

Document Name: HR 101 Employee Safety Effective Date:

Folder: Documents

Description:

Discuss Publication: Disabled

Tagged With:
HR Training

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

Where Do I Start Creating Training Tags?

Code of Conduct Training

General | Expiration | Properties | Courses | Assignments | Users | Security

Name: Code of Conduct Training Credit Hours: 3.000

Description:

Certificate Type: Annual Training

Inbox Alert: 0 days before expiration

Tagged With: HR Training

Image: Edit Template | Print All Certificates

Instructions:

Save Archive

HR-CC 101 - Code of Conduct Training

General | Content | Fees | Seats | Security

Course Number: HR-CC 101 Credit Hours:

Course Name: Code of Conduct Training

Description:

☐ Allow users to review completed course content

Approval Workflow: (None) Course Type: Ethics Training

Tagged With: HR Training

Certificate(s): Code of Conduct Training

Add a certificate...

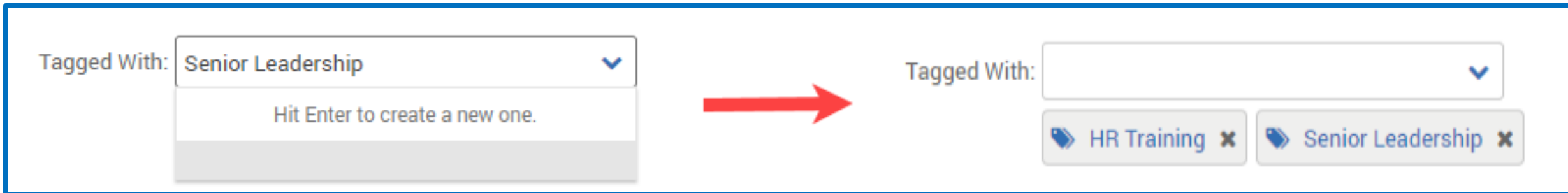
Save Archive

General Tab of either the related certificate or course.

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.



What else can a tag support?

Tags can:

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



A screenshot of a tag configuration interface. On the left, the text "Discuss Publication:" is visible. To its right is a form with two input fields: "Tag" containing "PowerDMS" and "URL" containing "http://www.powerdn". Below these fields is a green "Done" button. To the right of the "Done" button is a dropdown arrow. Below the form, the text "Tagged With:" is visible, followed by a tag labeled "PowerDMS" with a close icon (X).

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



A screenshot of a tag configuration interface. On the left, the text "Discuss Publication:" is visible. To its right is a form with two input fields: "Tag" containing "Personnel Update Fo" and "URL" containing "https://powerdms.co". Below these fields is a green "Done" button and a red-outlined button labeled "See Tagged". To the right of the "See Tagged" button is a dropdown arrow. Below the form, the text "Tagged With:" is visible, followed by a tag labeled "Personnel Update Form" with a close icon (X).

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.

Personnel / Policy Manual / General Orders

Personnel Information Update Form

General Revisions Review Standards Assignments Signatures Activity Security

Document Name: Personnel Information Update Form Effective Date: 7/6/2021

Folder: General Orders

Description:

Discuss Publication: Disabled

Tagged With:

Enable Public Link: ☒ Not Public ☐ Public

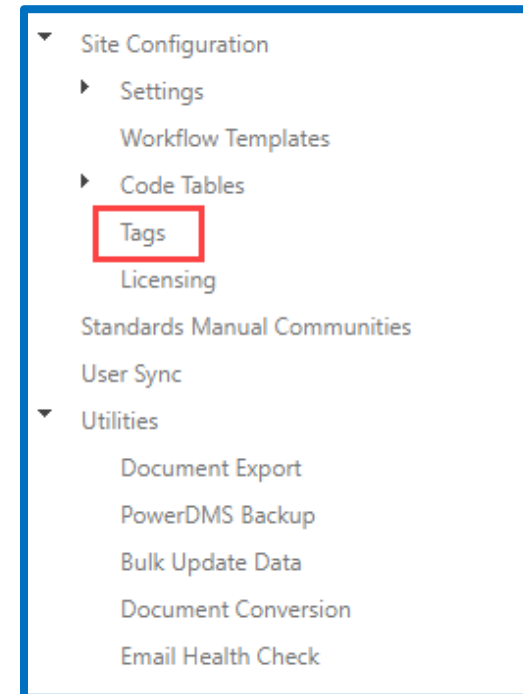
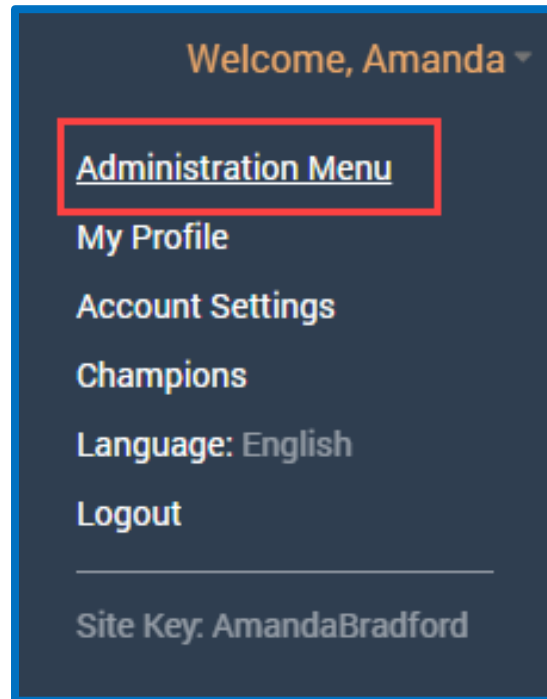
Enabling Public Link will make the published revision available on your public document page. Draft revisions must be published before they can be made public.

Public Documents Page

Internal Link: <https://powerdms.com/link/AmandaBradford/document/?id=907352> Copy

Managing Your Tags


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
















Managing Your Tags

Site Configuration » Tags PowerDMS 5.33.0


Manage Tags

Search: 

| Name | URL | | | | |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| HR Training | |  |  |  |  |
| New Hire Requirements | |  |  |  |  |
| Personnel Update Form | https://powerdms.com/link/AmandaBradford/document/?id=907352 |  |  |  |  |

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.

You Should Now Know:

- 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.



A person wearing a dark blue suit and a light blue shirt is holding a white rectangular sign with both hands. The sign has the word "QUESTIONS?" written on it in a bold, dark blue, sans-serif font. The background is a plain, light grey wall.

QUESTIONS?

Resources

[Understanding Tags](#)

[Linking Documents](#)

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

