

How to use Tags for Assignment of Snapshots

Snapshots can be assigned to individual analysts, typically based on department affiliation or college affiliation. This allows analysts to list only those Snapshots to which they are assigned.

The functionality that allows Snapshots to be assigned is called Tagging. In general, a tag is applied to a Snapshot and can be used for assignment of a Snapshot to an individual analyst.

Tags are available from within the “Tags” column in the Work In Progress listing of the Candidate Reviews page.


This functionality applies to the following roles only:

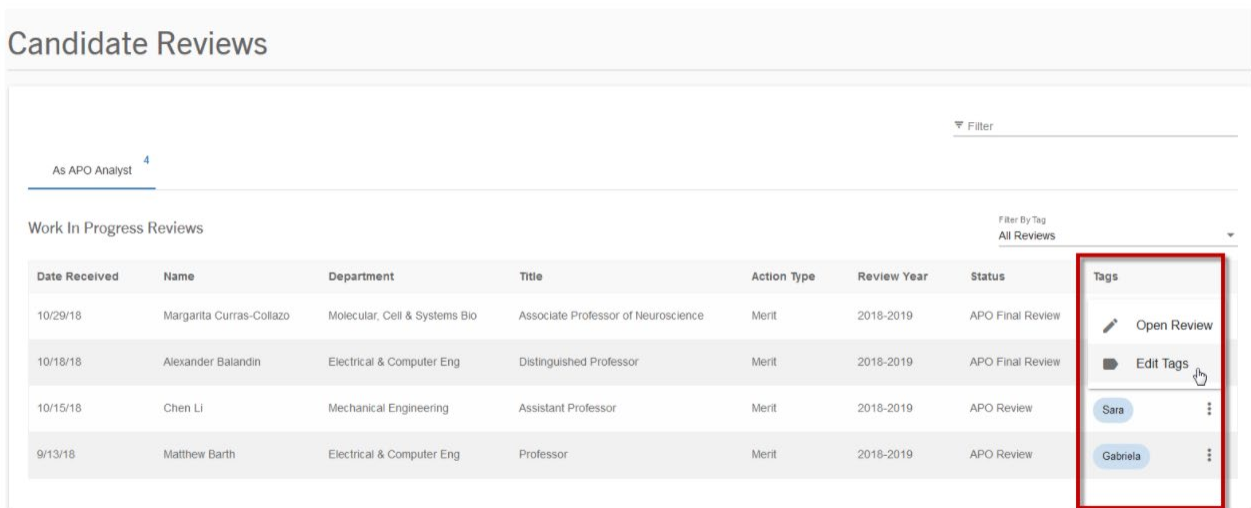
- Department - File Preparer
- College – Dean’s Analyst
- AP Office – AP Analyst
- CAP – CAP Analyst

General Guidelines for Tags

- Tags can have words, numbers, or symbols (e.g. File# 099)
- Each Snapshot can have up to 5 tags applied
- The system will remember the last chosen filter
- Once a tag is entered, the tag entry will suggest that tag in the future
- All tags are viewable and shared by all users in the given level (Department vs. College vs. APO vs. CAP)

To ADD a tag, follow these steps:

1. Click on the  menu and choose “Edit Tags”. (see screenshot below)
2. To add a tag, click above the underline and type a name or word. You may remove an existing tag by clicking the ‘X’ next to the tag name, or add another tag (up to 5 total tags per Snapshot).
3. Click the Save button.



To REMOVE a tag, follow these steps:

1. Click on the ... menu and choose “Edit Tags”.
2. Remove an existing tag by clicking the ‘X’ next to the tag name. (see screenshot below)
3. Click the Save button.

Candidate Reviews

The screenshot shows the 'Candidate Reviews' interface. At the top, there is a 'Filter' dropdown and a '4' next to 'As APO Analyst'. Below this is a section for 'Work In Progress Reviews' with a 'Filter By Tag' dropdown set to 'All Reviews'. A table lists reviews with columns: Date Received, Name, Department, Title, Action Type, Review Year, Status, and Tags. The first row is highlighted, and a popup menu is open over the 'Tags' column, showing a tag named 'Sara' with an 'X' icon next to it, indicating it can be removed. 'Cancel' and 'Save' buttons are at the bottom right of the popup.

Date Received	Name	Department	Title	Action Type	Review Year	Status	Tags
10/29/18	Margarita Curras-Collazo	Molecular, Cell & Systems Bio	Associate Professor of Neuroscience	Merit	2018-2019	APO Final Review	Sara
10/18/18	Alexander Balandin	Electrical & Computer Eng	Distinguished Professor	Merit	2018-2019	APO Final Review	
10/15/18	Chen Li	Mechanical Engineering	Assistant Professor	Merit	2018-2019	APO Review	
9/13/18	Matthew Barth	Electrical & Computer Eng	Professor	Merit	2018-2019	APO Review	

Filter the list of Snapshots using Tags

Once tags have been applied to multiple Snapshots, you can filter the list by the tag names.

To FILTER the list of Snapshots, follow these steps:

1. Click on the underline in the “Filter By Tag” area (see screenshot below)
2. Choose from an existing tag by clicking on the tag name.
3. To view the entire list of Snapshots again, choose the “All Reviews” tag.

Candidate Reviews

As APO Analyst ⁴

Filter

Filter By Tag
All Reviews

Work In Progress Reviews

Date Received	Name	Department	Title	Action Type	Review Year	Status	Tags
10/29/18	Margarita Curras-Collazo	Molecular, Cell & Systems Bio	Associate Professor of Neuroscience	Merit	2018-2019	APO Final Review	Open Review
10/18/18	Alexander Balandin	Electrical & Computer Eng	Distinguished Professor	Merit	2018-2019	APO Final Review	Edit Tags
10/15/18	Chen Li	Mechanical Engineering	Assistant Professor	Merit	2018-2019	APO Review	Sara
9/13/18	Matthew Barth	Electrical & Computer Eng	Professor	Merit	2018-2019	APO Review	Gabriela

Choose a Tag to Filter the List

As APO Analyst ⁴

Filter

Filter By Tag
All Reviews

Work In Progress Reviews

Date Received	Name	Department	Title	Action Type	Review Year	Status	Tags
10/29/18	Margarita Curras-Collazo	Molecular, Cell & Systems Bio	Associate Professor of Neuroscience	Merit	2018-2019	APO Final Review	Untagged Reviews
10/18/18	Alexander Balandin	Electrical & Computer Eng	Distinguished Professor	Merit	2018-2019	APO Final Review	Gabriela
10/15/18	Chen Li	Mechanical Engineering	Assistant Professor	Merit	2018-2019	APO Review	Kameron
9/13/18	Matthew Barth	Electrical & Computer Eng	Professor	Merit	2018-2019	APO Review	No Comments
							Sara