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.

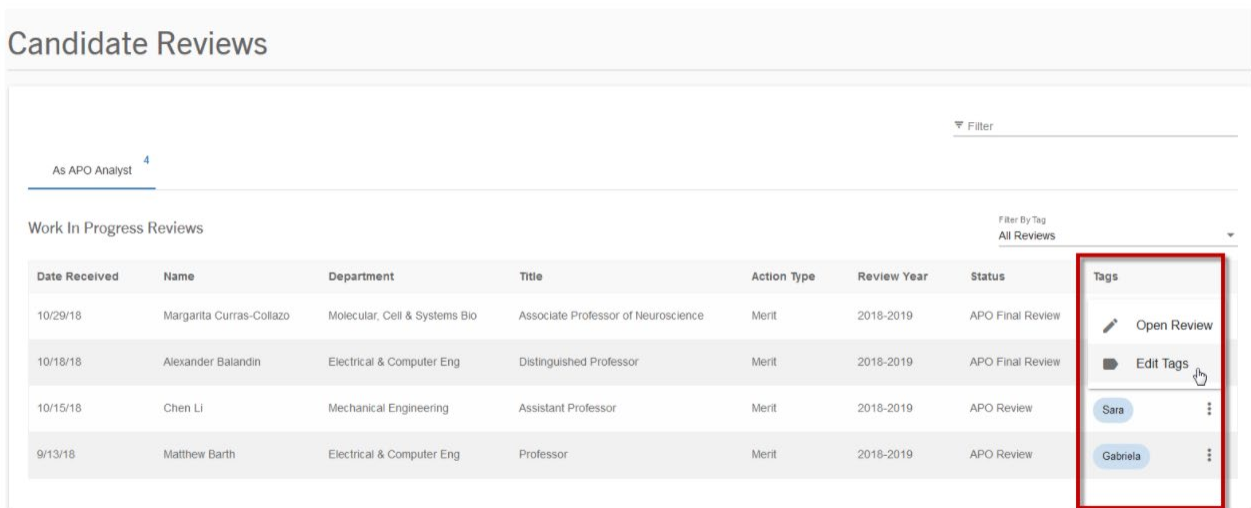This functionality applies to the following roles only:
- Department - File Preparer
- College – Dean's Analyst
- AP Office – AP Analyst
- CAP – CAP Analyst

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.

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

Choose a Tag to Filter the List