Setting Up User Tags

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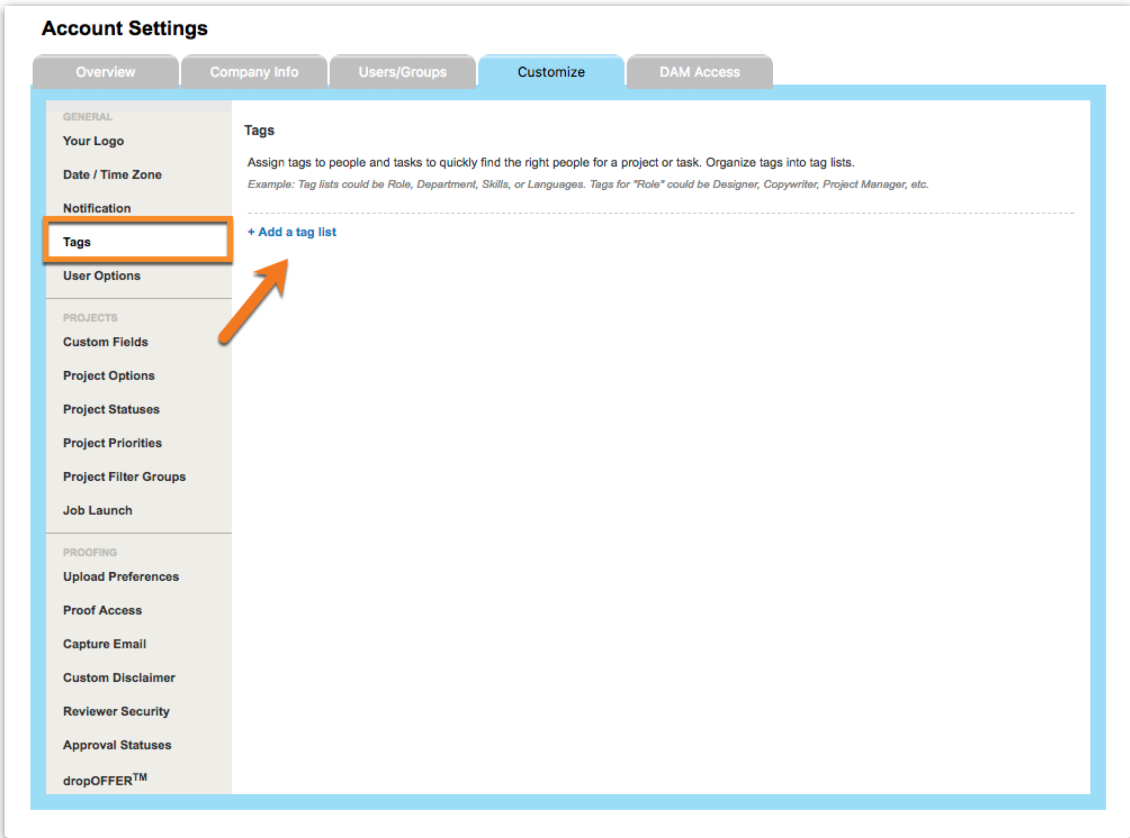
What are User Tags?

Admins can create tags to **help identify your team members** by Role, Department, Location, etc. Then, you'll be able to **search and filter by these tags** when assigning your team members to Projects and Tasks.

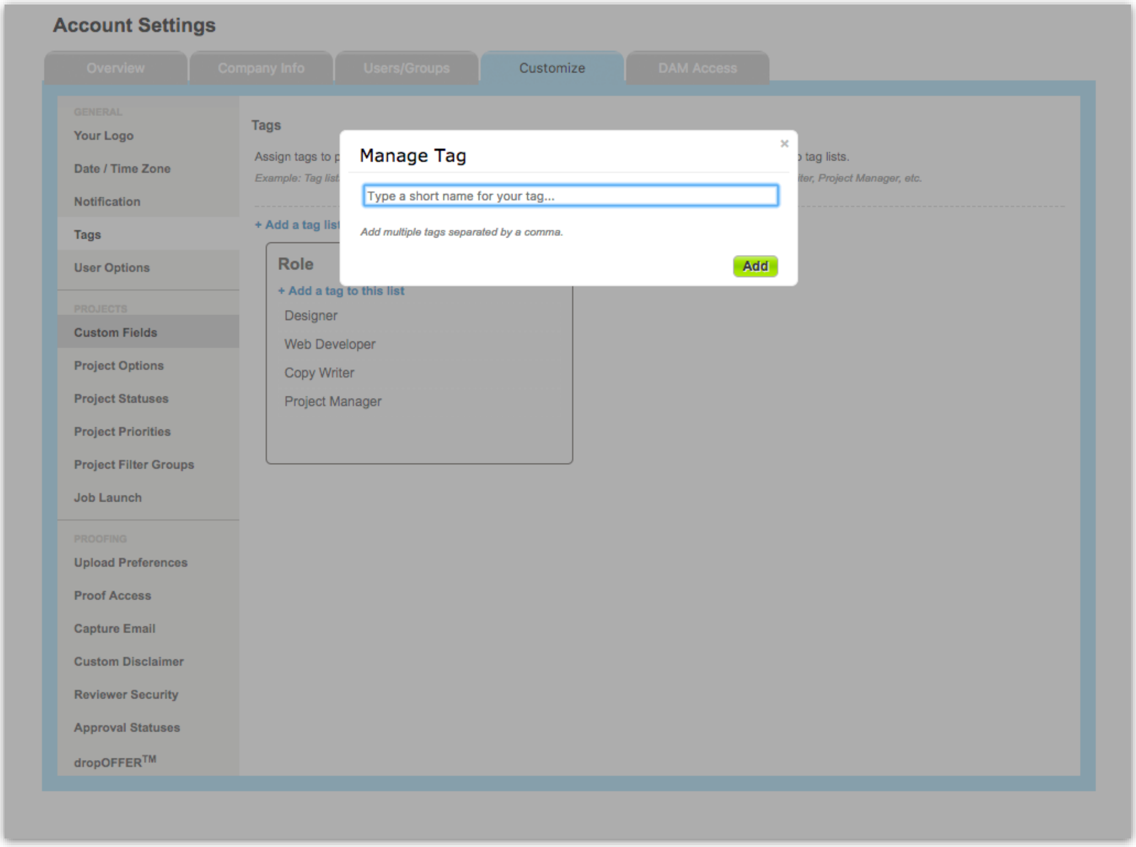
Setting up User Tags

1. To begin, create a **tag list** that describes a group of tags you will be assigning to users. *For example, a tag list named 'Role' might contain various tags like Designer, Web Developer, Copy Writer, Project Manager, etc.*
2. Navigate to **Account > Account Settings > Customize > Tags.** Click **+Add a tag list** to name and create your list.



3. Once you have created the tag list, click **+Add a tag to this list** to create the

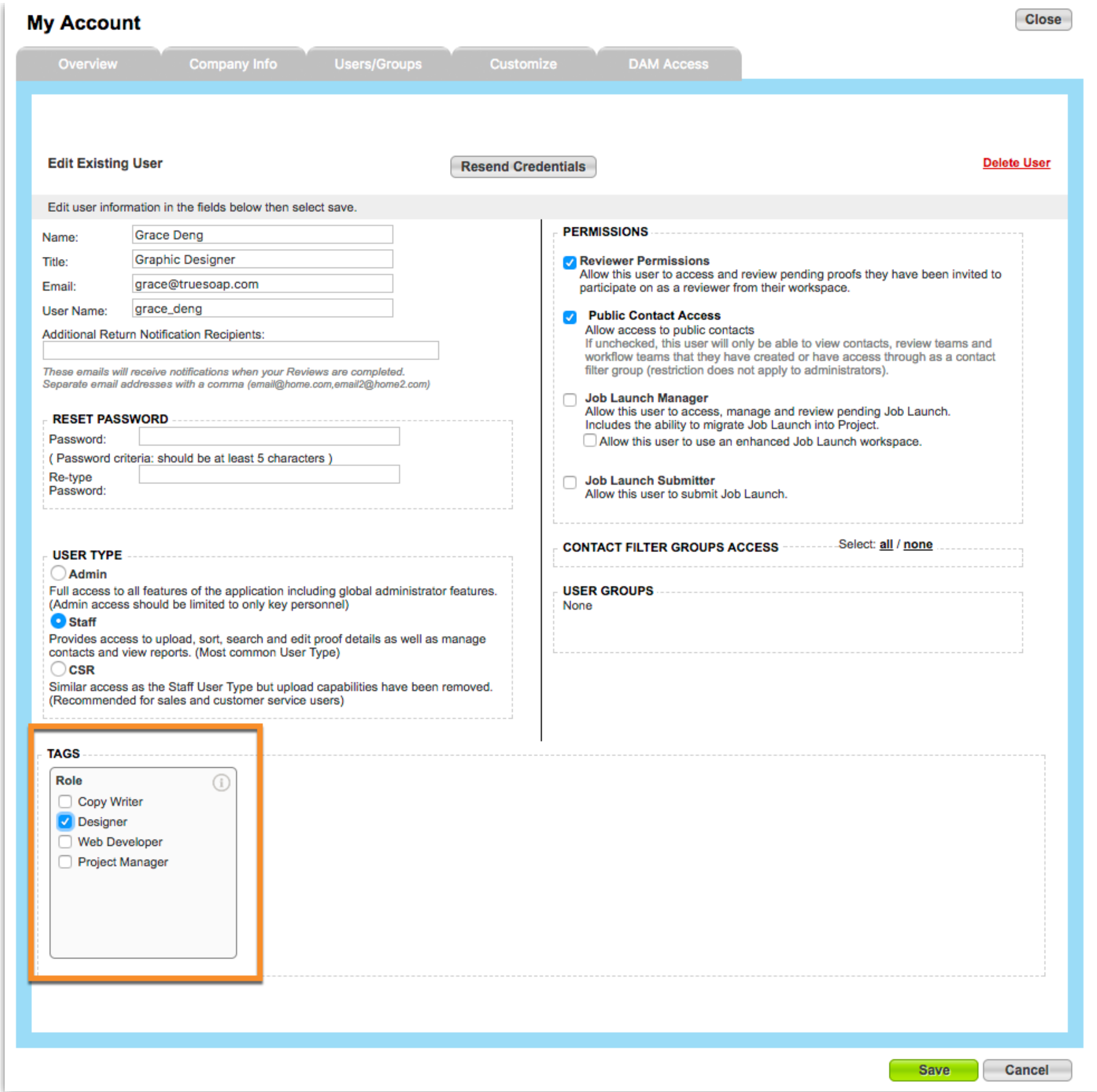
applicable tags. You can type multiple tags separated by comma and click **Add** to save.



Assigning User Tags

To assign user tags to individual users, follow the steps below.

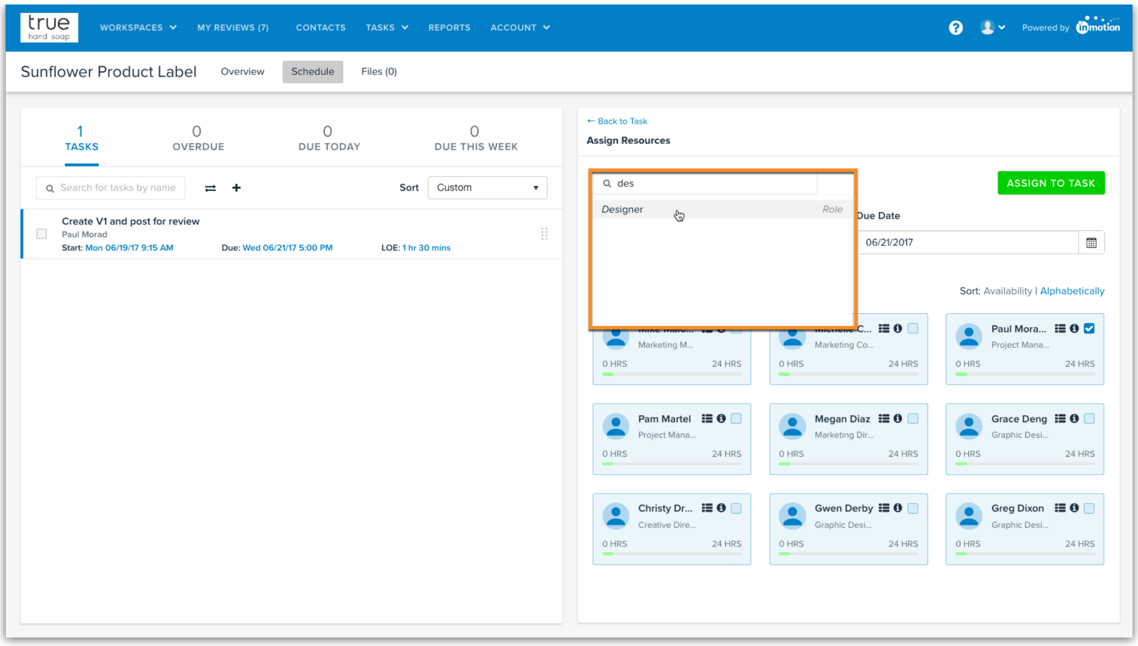
1. Navigate to **Account > Account Settings > Users/Groups** to find and select the applicable user record.
2. Once you have opened the user record you would like to edit, you can simply **check on or off the user tag(s)** relevant to the user.
3. Click **Save** to proceed.



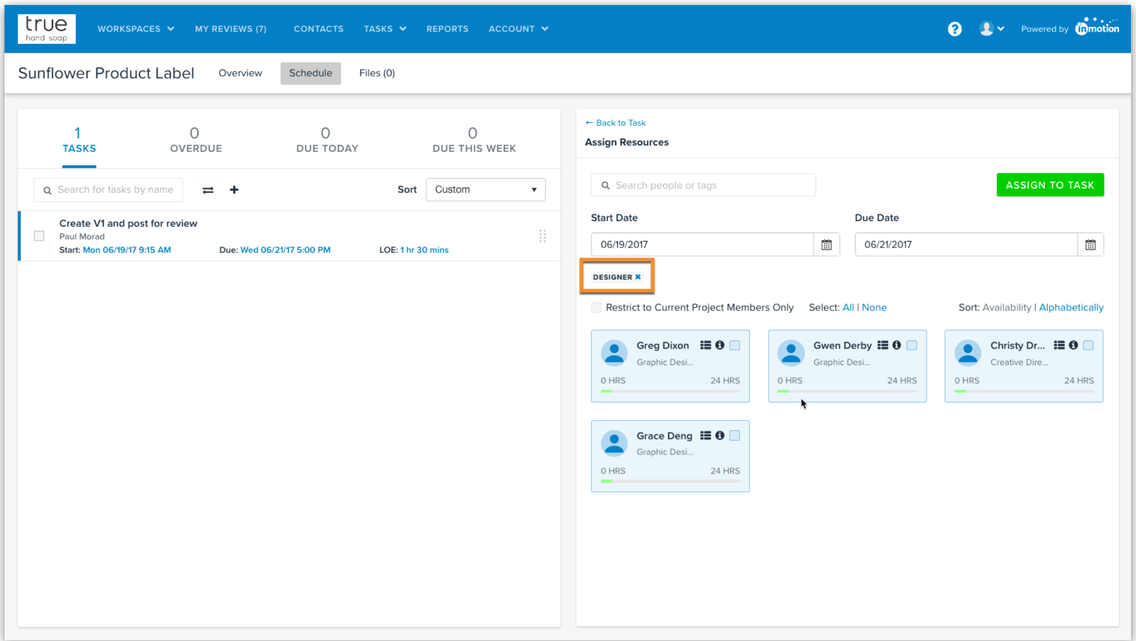
Search by User Tag

When Assigning Resources (http://guide.inmotionnow.com/help/assigning-resources) to a task or project from the Project Dashboard, you can search the available resources by user tag to narrow your results.

1. In the search box, begin typing the tag you'd like to use and it will appear. Select the tag to narrow your search.



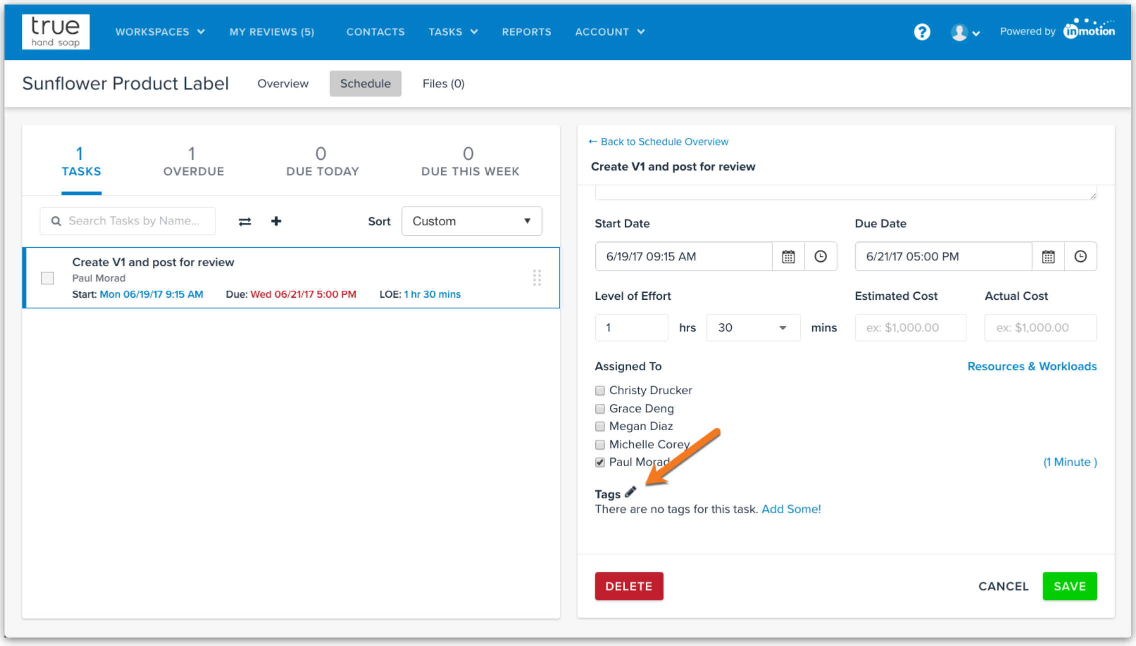
2. Once you have applied the tag to narrow your search, you will see it appear above the list of users. You can click the **X** to the right of the tag in order to remove the search filter.



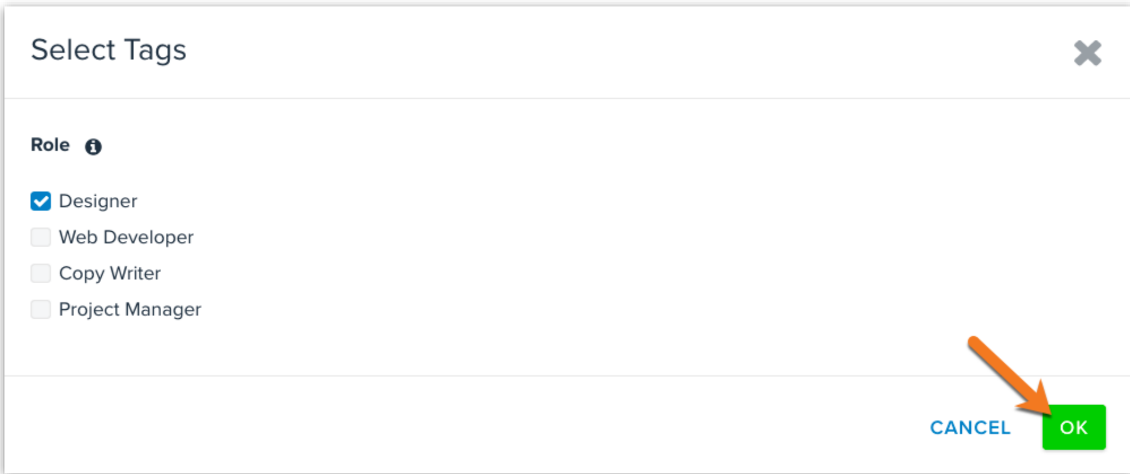
Applying User Tags to Tasks

User Tags can also be applied to individual tasks in order to assist with assigning resources. When the tag is applied directly to the task, it will automatically filter the available resources. This is commonly used when the project member creating tasks is not the user who assigns the resources to each task.

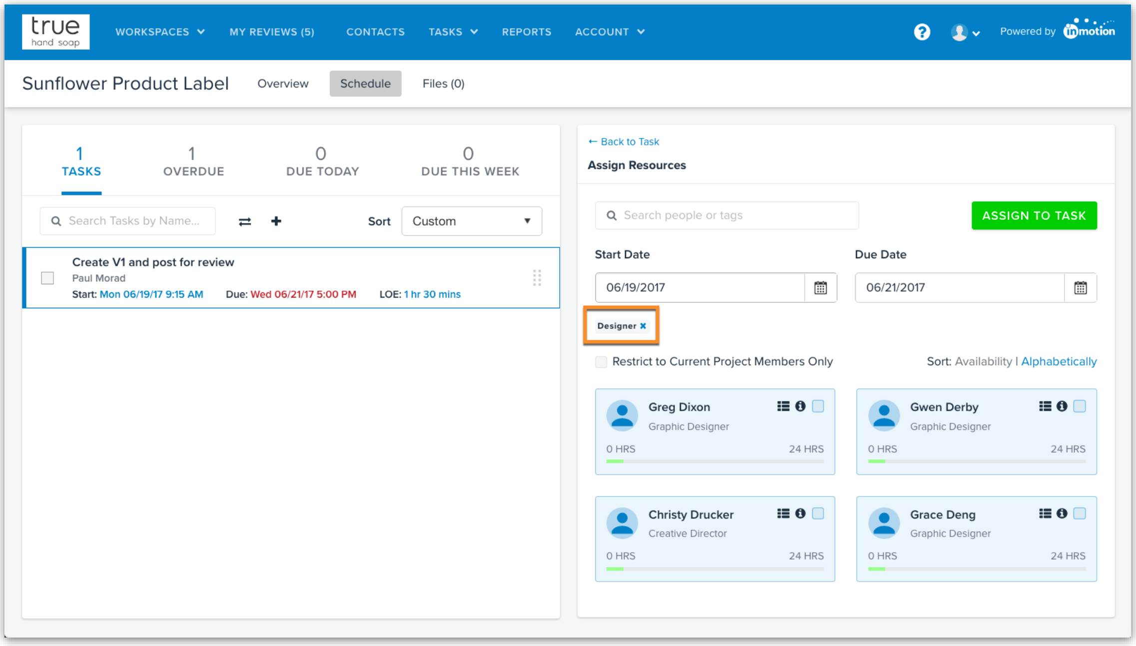
1. Select the appropriate task and scroll to the bottom of the task information pane.
2. Click the edit icon next to **Tags** to apply a tag to the task.



3. In the **Select Tags** modal, check off the box(es) that are applicable to the task and click **OK**.



4. Now, when you click **Resources & Workloads**, the list of available team members will automatically be filtered by the applied tag.



WORKSPACES
MY REVIEWS (5)
CONTACTS
TASKS
REPORTS
ACCOUNT
Powered by inmotion
Sunflower Product Label
Overview
Schedule
Files (0)
1 TASKS
1 OVERDUE
0 DUE TODAY
0 DUE THIS WEEK
Search Tasks by Name...
Sort
Custom
Create V1 and post for review
Paul Morad
Start: Mon 06/19/17 9:15 AM
Due: Wed 06/21/17 5:00 PM
LOE: 1 hr 30 mins
← Back to Task
Assign Resources
Search people or tags
ASSIGN TO TASK
Start Date
06/19/2017
Due Date
06/21/2017
Designer
Restrict to Current Project Members Only
Sort: Availability | Alphabetically
Greg Dixon
Graphic Designer
0 HRS
24 HRS
Gwen Derby
Graphic Designer
0 HRS
24 HRS
Christy Drucker
Creative Director
0 HRS
24 HRS
Grace Deng
Graphic Designer
0 HRS
24 HRS