

# CREATING AND ASSIGNING A TAG

This guide assumes that you have already added your new users by importing them through the template or adding them individually and have assigned assessments to them

**tip** When you add new users to your console or import them, they are automatically placed in the Selected Users tab. They will remain there until you either remove them or exit the console

## CREATING THE TAG

1 Click on Categories & Tags

2 Choose the category for the Tag you'll be creating (usually it's the same as the assessment you've assigned)

3 Click on Create Tag to switch to the Create Tag dialog box

4 Name your tag

5 Save your Tag

The screenshot shows the 'Categories & Tags' section of a software interface. At the top, there are navigation tabs: 'Getting Started', 'Users & Assessments', 'Teams', 'Client Details', and 'Categories & Tags'. The 'Categories & Tags' tab is active. Below the tabs, there is a 'Create Tag' button and a 'Create Tag Category' button. A dropdown menu is open, showing a list of categories: 'BPA', 'Behavior Style: 360 Observer Groups', 'Teams That Work Plus', 'Inventory', 'Status', 'Primary Behavior Style', 'Secondary Behavior Style', 'Users', 'Teams That Work Plus', 'Team Leaders', 'Team Members', 'TTW Pre/Post', and 'Behavior Style: 360 Observer Groups'. The 'Behavior Style: 360 Observer Groups' category is selected. To the right, there is a 'Create Tag' dialog box. It contains a 'Tag Name' field, an 'Active' checkbox (checked), a 'Sort Order' dropdown (set to 1), and a 'Description' text area. At the bottom of the dialog are 'Cancel' and 'Save' buttons.

## ASSIGNING THE TAG - PART 1

6 Click on Users & Assessments

7 Click on Selected Users

8 Make sure everyone is here. If you're missing someone, go back to All Users and find them by putting their email address in the search box. Then click on the box to the left of the name and click on Add to Selected Users. When you've done that for everyone, return to Selected Users

9 Click on Assign Tag

The screenshot shows the 'Users & Assessments' section of the software interface. At the top, there are navigation tabs: 'Getting Started', 'Users & Assessments', 'Teams', 'Client Details', and 'Categories & Tags'. The 'Users & Assessments' tab is active. Below the tabs, there is a 'Users & Assessments' section with several buttons: 'Add User', 'Assign Assessment', 'Email Assessments', 'View Report', and 'Assign Tag'. Below these buttons, there are two tabs: 'All Users' and 'Selected Users'. The 'Selected Users' tab is active. Below the tabs, there is a 'Remove users from Selected Users' button. Below that, there is a table with columns: 'First Name', 'Last Name', and 'Email'. The table contains three rows of data: 'Sample', 'User 1', 'Sam'; 'Sample', 'User 2', 'Sam'. The 'Sample' row is highlighted.

	First Name	Last Name	Email
<input checked="" type="checkbox"/>	Sample	User 1	Sam
<input checked="" type="checkbox"/>	Sample	User 2	Sam

## ASSIGNING THE TAG - PART 2

**10** Choose the category from Step 2

**11** Scroll through the drop-down list to find the tag you created

**12** Click on **Assign Tags**

**13** After you've Assigned the Tag, it will show up here, along with any other tags assigned to the Users

### Add/Edit Tags

Tag Category:

Behavior Style: 360 Group **10**

Tag:

**11**

Assign Tags **12**

Users:

First Name	Last Name	Passcode
Sample	User 2	SWBSACQASA
Sample	User 4	LQAPAHEA

Close

Tags assigned to these user(s):

Tag Category	Tag Name	%	Delete
Another Tag Category	Tag 2	100	<input checked="" type="checkbox"/>
Behavior Style: 360 Groups	360 Group	100	<input checked="" type="checkbox"/>

**14**

If you want to remove someone from a Tag, click on the . The tag will still exist, but that user won't be associated with it

When you go back to All Users, your new tag will show up under the category you chose.

All Users
Selected Users

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Search

Filter

- ▶ Inventory
- ▶ Status
- ▶ Users
- ▶ Behavior Style: 360 Observer Groups
- ▶ Team Distribution Teams
- ▶ Teams That Work Plus Teams
- ▶ Teams That Work Teams
- ▶ BPA
- ▶ Behavior Style: 360 Groups

Test BS360 Group

Search

Filter

Behavior Style: 360 Groups > Test BS360 Group

- ▶ Inventory
- ▶ Status
- ▶ Users
- ▶ Teams That Work Teams
- ▶ Behavior Style: 360 Groups

Add to Selected Users

Results

Drag a column header and drop it here to group by that column

<input checked="" type="checkbox"/>	First Name	Last Name	Email
<input type="checkbox"/>	Sample	User 1	Sample1@test.com
<input type="checkbox"/>	Sample	User 2	Sample2@test.com
<input type="checkbox"/>	Sample	User 3	Sample3@test.com
<input type="checkbox"/>	Sample	User 4	Sample4@test.com

When you click on the Tag, everyone should show up in the results pane