

siterrra | Knowledge Base Article

General Navigation - Adding Tags in Siterrra

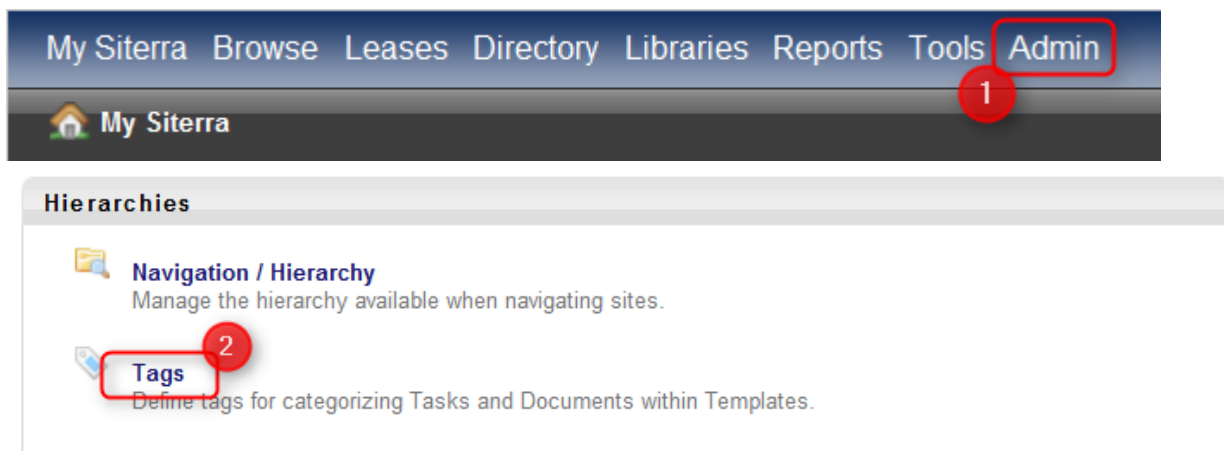
Question:

How can new Sections or Categories be added in Siterrra?

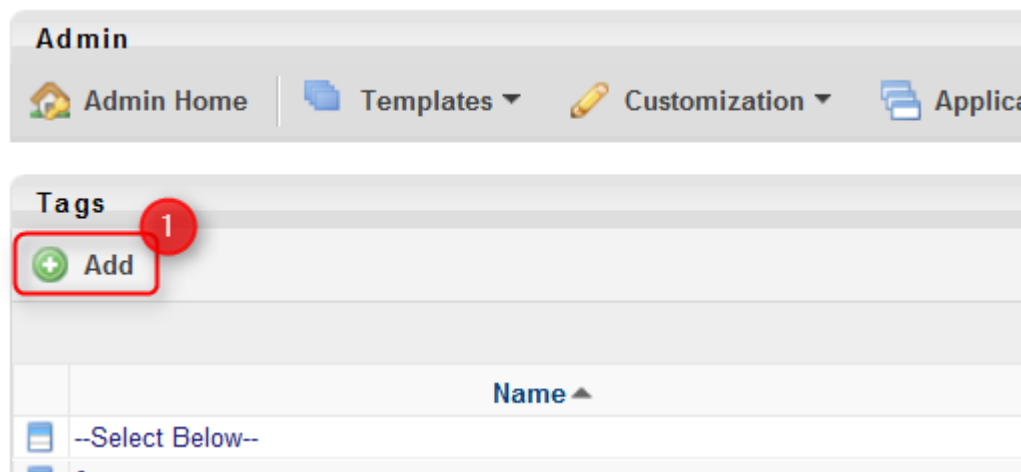
Answer:

Adding “Sections” and “Category” names is done by using the “Tags” portion in Siterrra. This is also where User and Check list Tags are created.

Begin by navigating to “Admin” (1) and then to “Tags” (2).



The new page will have a list of all the current tags used in the portfolio. Create a new one by selecting “Add” (1) in the upper left corner.



Fill out the display name for the tag and choose the type from the look up table. The options are:

User: User tags are created by the users, not Admins. This describes when a user creates a tag by uploading a document or photo into a library and by typing an ad hoc category or section name.

Category and Sections: Are used on the template level. They exist on both Library and Schedule Templates to help organize documents and photos that are uploaded into the system.

Checklist: Are used on the Schedule Template level. When adding a new task on the template it can be assigned to a checklist. The dropdown menu of checklists includes all tags with the type 'Checklist'.

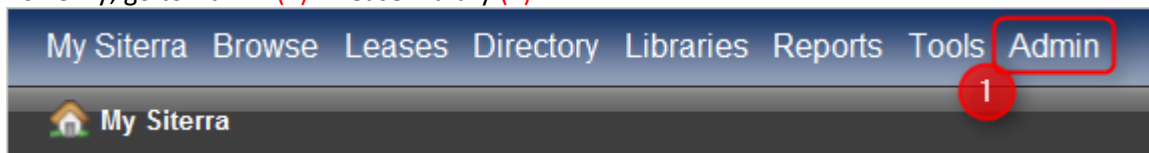
Select the appropriate type (1), in this example "Category" is shown. Then select 'Submit' (2).

The first screenshot shows the 'Tags' form with the 'Name' field set to 'New Tag' and the 'Type' dropdown menu open. The dropdown menu lists options: '- Not Selected -', 'Other', 'User', 'Category', 'Section', and 'Checklist'. The 'Category' option is highlighted. A red circle with the number 1 is placed over the 'Type' label. The 'Submit' button is partially visible but not yet selected.

The second screenshot shows the same 'Tags' form. The 'Name' field is 'New Tag' and the 'Type' dropdown is set to 'Category'. The 'Submit' button, which has a green checkmark icon, is highlighted with a red circle and the number 2. The 'Cancel' button is also visible.

Once the Tag has been created, it will be available for use.

To verify, go to Admin (1) > Lease Library (2).



Templates

Schedule Templates
 Create or modify Schedule Templates.

Library Templates
 Create or modify Library Templates.

Lease Templates
 Create or modify Lease Templates.

Letter Templates
 Create or modify Letter Templates.

Then select the blue and white menu icon to the left of the library intended to be added to the Category (1), and select "Manage Category"(2).

Library Templates

+ Add

	Name	Type	Description
(1)	FWS New Library Template	Document Library	
	Edit Manage Categories (2) Manage Sections Delete	Document Library	
		Document Library	
		Document Library	
		Document Library	Lease Photo Library
		Photo Library	

There the newly created Category will be visible and will be able to be selected and added to the Template by clicking "Select" (1) and then "Submit"

Available Categories

	Name ▲	Type Name
Select	New Cat.	Category
Select	New Cat. 1111	Category
Select	New Cat. 2	Category
Select	New Cat. 4	Category
Select	new one	Category
Select (1)	New Tag	Category

Selected Categories

Remove

Remove

Category Name

New Tag

Submit

Cancel