

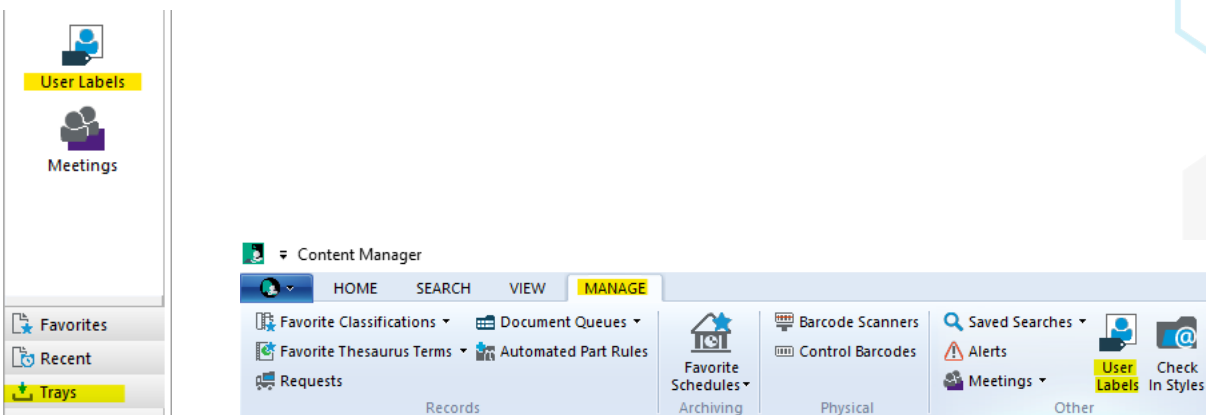
Creating Personal or Group User Labels

NOTES:

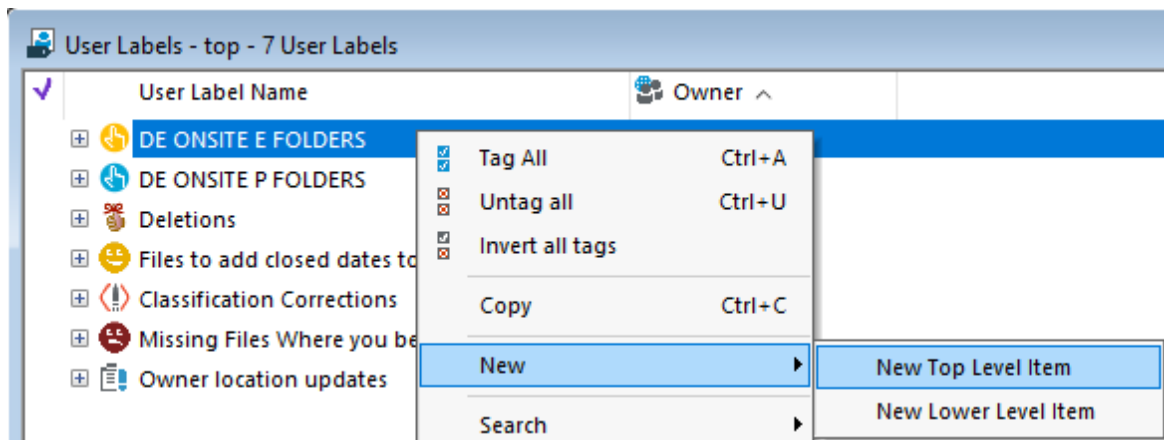
User Labels are used to create shortcuts to folders or documents that make it easy to find for your business needs. Each **User Label** can have multiple sub-levels and there is no limit to the number you can create. User labels can also be created so a whole organization can access and view it.

Create a New Personal User Label:

1. From the **Shortcuts** tab, **Trays** select **User Label** OR from the **Manage** Tab, select **User Label**.

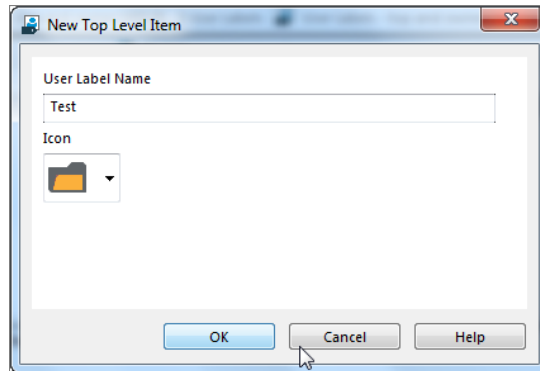


2. On the **User Labels** popup:
 - To create a new highest-level label, right click in the screen area and from the **New** menu, choose **New Top Level Item**.
 - To create a sub-level of an existing label, right click on the label and from the **New** menu, choose **New Lower Level Item**.



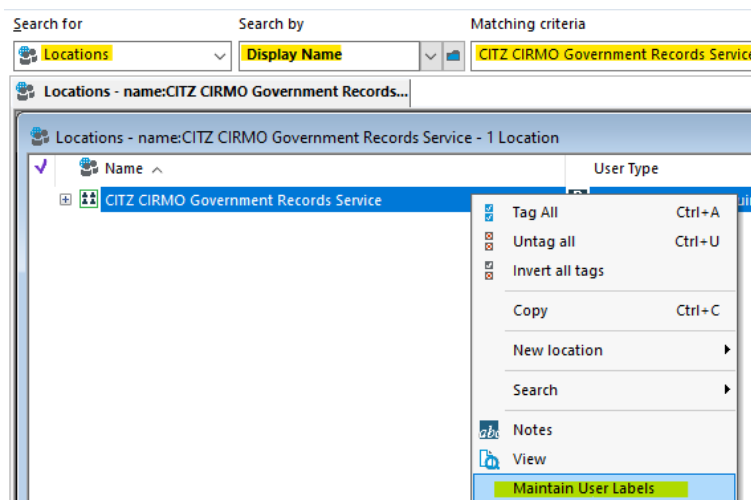
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- On the **New Top Level/New Lower-Level Item** popup:
 - Enter a name for your new user label in the **User Label Name** field and select an Icon if you want from the dropdown menu. Remember that these labels are not visible to or accessible by anyone else, they are simply your shortcuts. (See **Create a User Label for a group** below for group access instructions)
- Click **OK**.

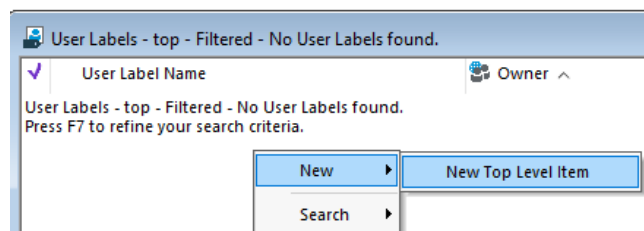


Create a User Label for a group:

- First search for Location group that will have access to the **User label**.
 - Use the Quick search **Location, Display name**, enter a location group name.
 - Now right click, select **Maintain User Label**.

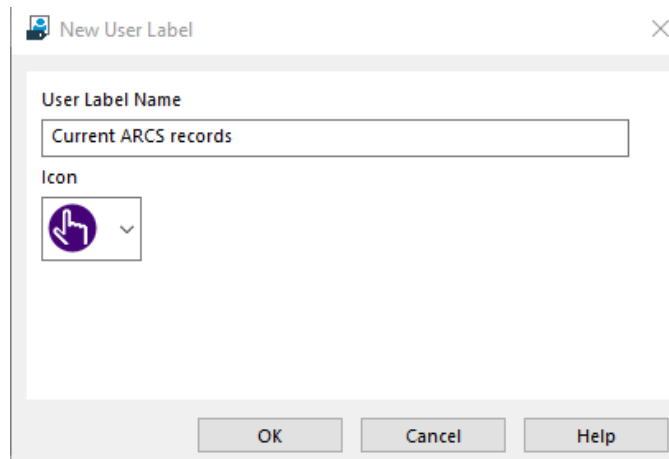


- On the **User Label** pop up, right click and select **New top level**.

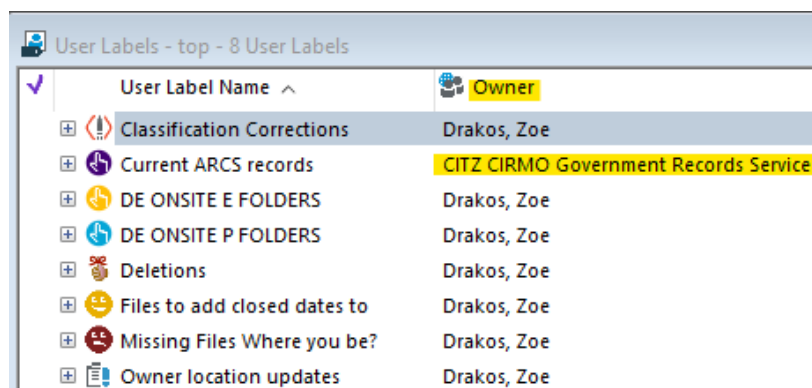


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3. On the **New User Label** pop up, name the **User Label** and add a unique Icon if you want. This creates the **User Label** in every user's personal **User Label tray** that is part of the location group you selected.



4. This creates the **User Label** in every user's personal **User Label Tray** who is part of the location group you selected. Notice that the **Owner** location shows the group name versus your personal User Labels that show your name as the owner.



Note: All users in the group will now be able to add and remove items from the group User Label as well as delete the User Label. Ensure you communicate to all users the intended use when using this group User Label. (e.g. Only for reference purposes and maintained by a single user or All users maintain and can add and remove or Do not delete group User label).

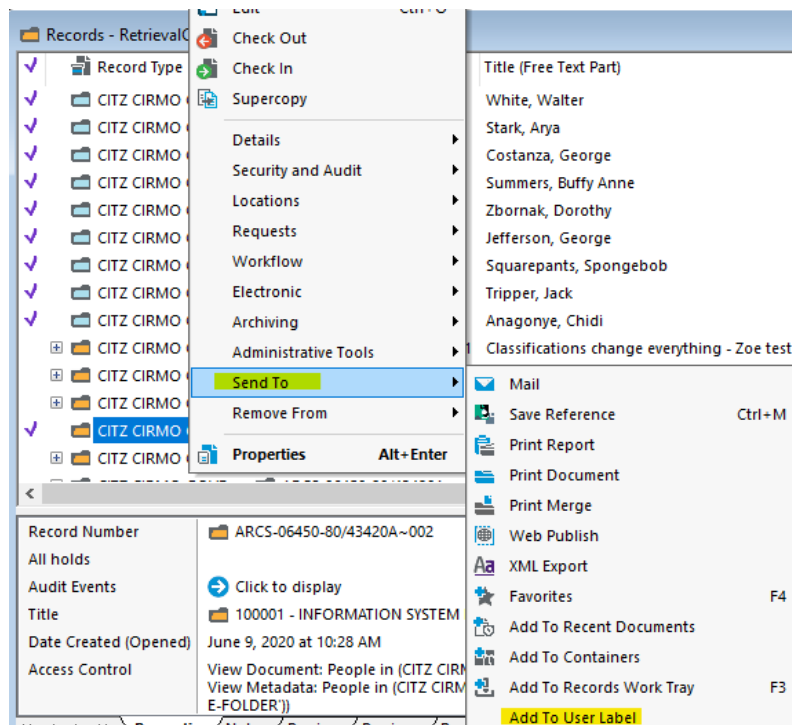
As **User labels** are trays showing records added to them by a user, they need to be maintained and kept up to date. Especially if it is information that is required by the group and could change periodically.

See **Tip 019 Saved Searches** if you want to locate records based on a set of search criteria.

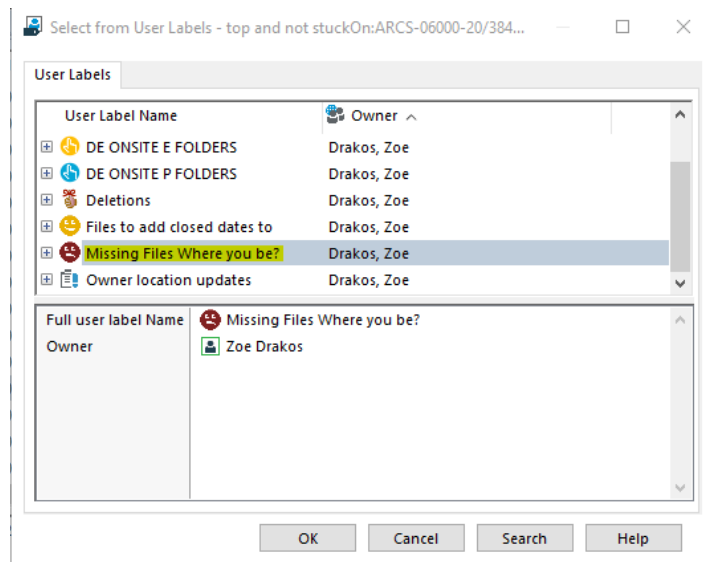
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Send records to a User Label:

1. Tag the record(s), right click, select **Send To** and then **Add to User Label**.



2. Select the appropriate **User Label** and click **OK**.

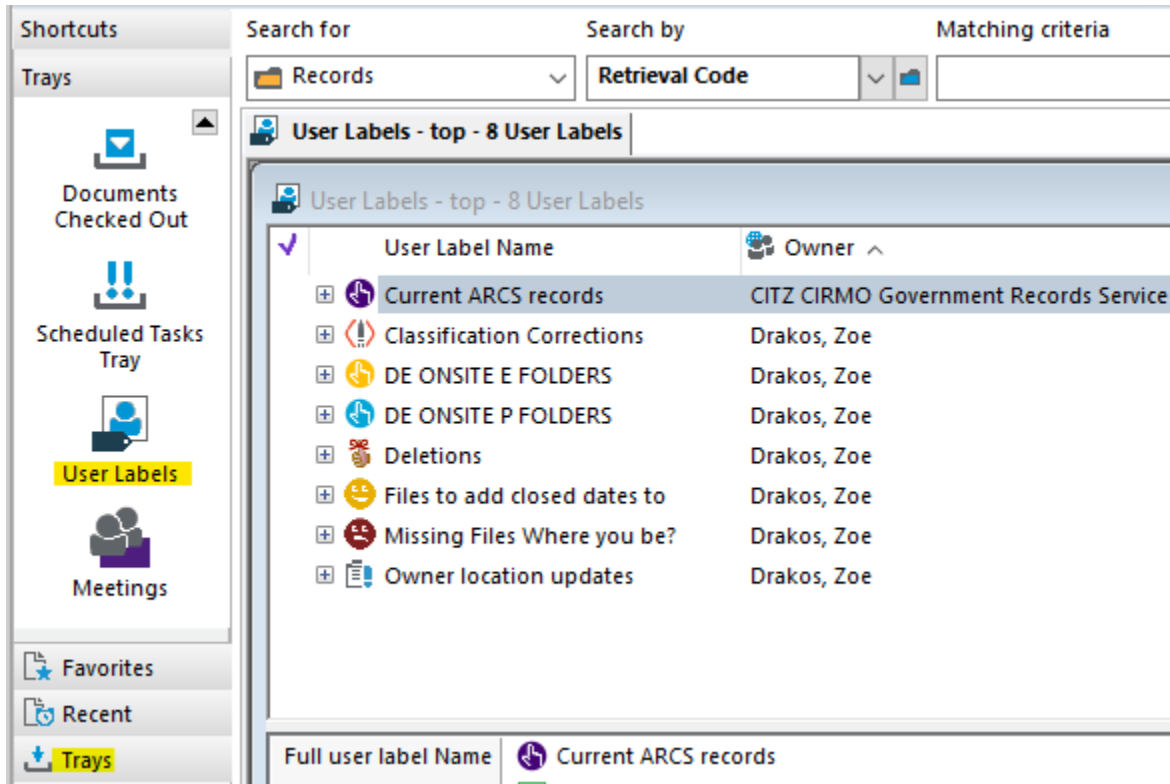


3. If sending more than 1 record, select **Yes to All** on popup.

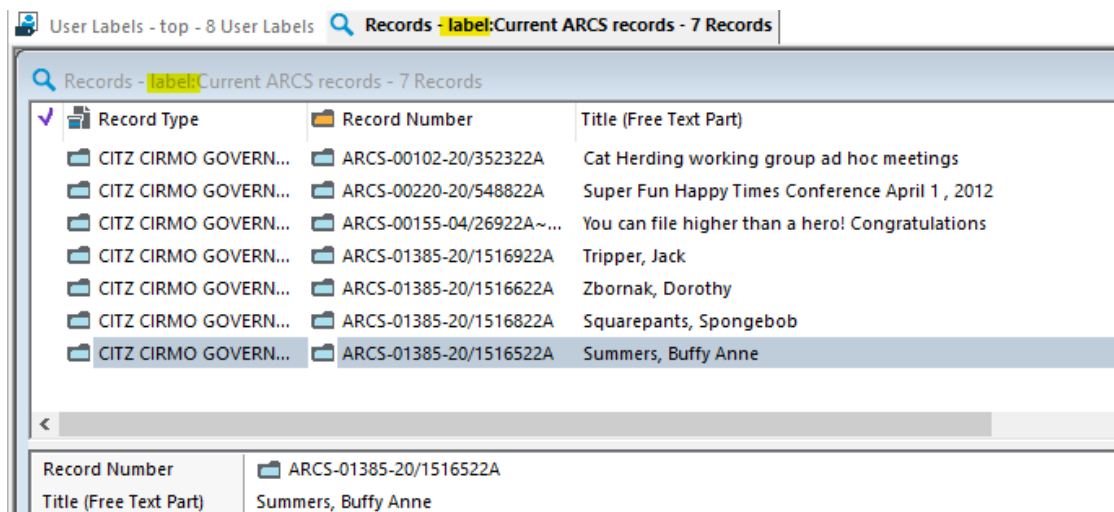
Note: When moving records into an existing **User Label**, if one or more of the records is already contained within that **User Label** then it will not show as an option to select as the system knows that it is already there and will not let it be added twice. Go to the **User Label** to see which record is already there if this happens.

Display your User Labels:

1. Click **Trays** from the **Shortcuts** bar.
2. Click **User Labels**. The User Labels screen displays your User Labels.



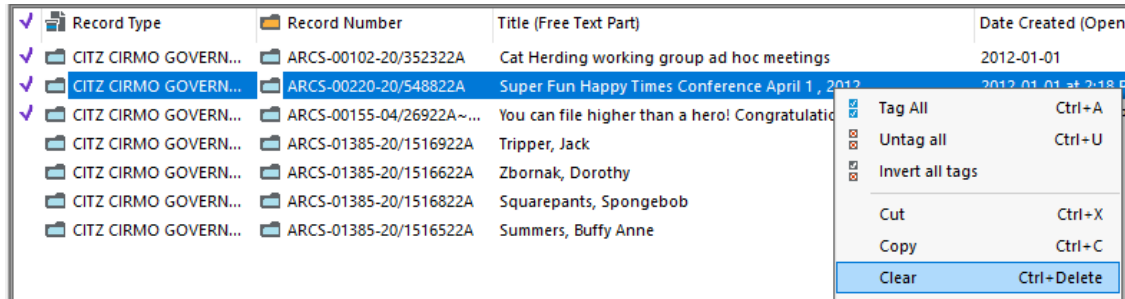
3. To view the records associated with your **User Labels**:
 - Double click on the **User Label**, or
 - Right click on the User Label and select **Show Records**.
 - All the records associated with the User Label will be displayed.



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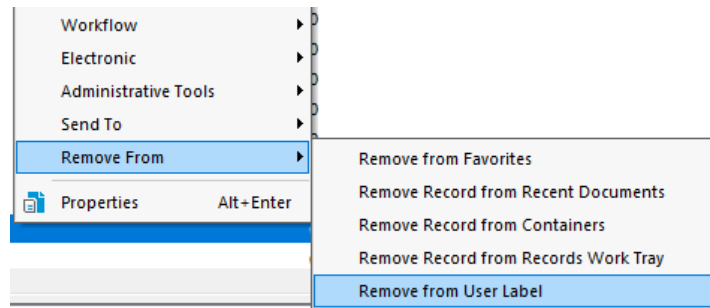
4. To remove records from a User Label:

- Tag the record(s), right click and select **Clear**,

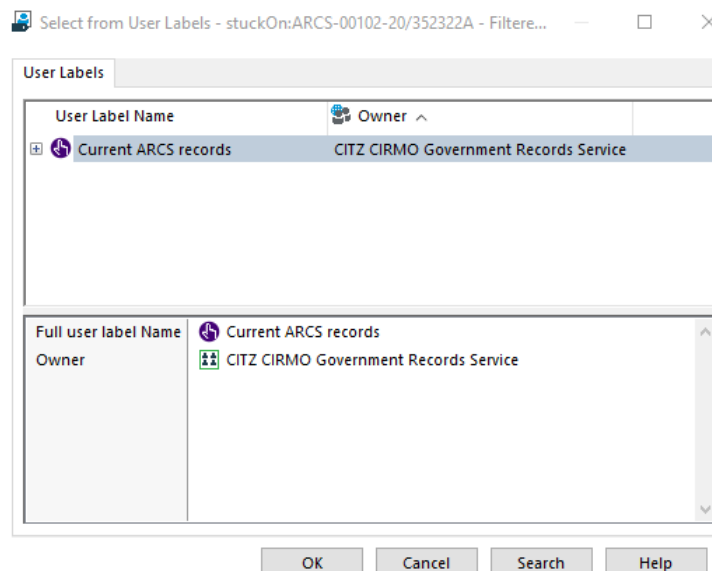


OR

- Select the record, right click and select **Remove from User Label**.



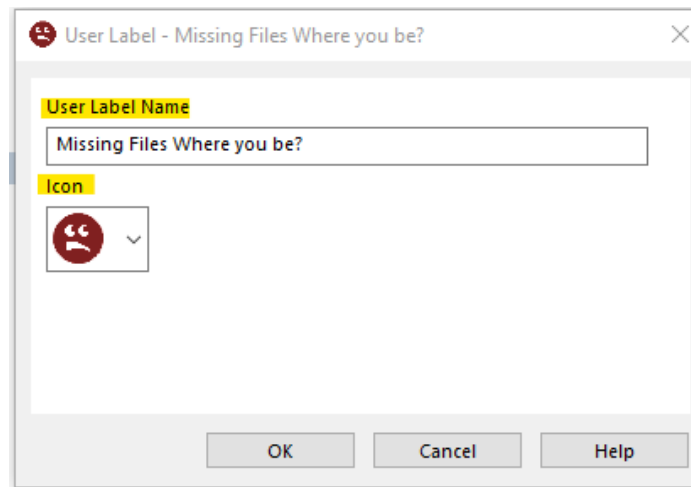
- On the **Select From User Labels** popup, select the **User Label** you want to remove it from.



- Click **OK**. The record will no longer be associated with the **User Label**. The record will be unchanged.

Modify a User Label:

1. Right click on the **User Label**.
2. Select **Properties**.
3. Modify the **User Label Name** or **Icon** fields. If it is a group **User Label**, make sure to tell the group of any changes made.



Delete a User Label:

1. Right click on the **User Label**.
2. Select **Delete**. A message asking you to confirm that you want to remove the **User Label** will be displayed.
3. Click **OK**.

Note: Deleting a User Label does not delete the actual records contained in it. Do not delete a Group User Label as it will delete it from everyone's User Label tray who is part of the group.