

Introduction

This document is a step-by-step guide to successfully use Tags in Access Unify® | Records (“Unify Records”).

What are Tags?

Tags are user-applied labels that can be assigned to records within an Inventory. They allow users to group related records, flag items for action, and enhance searchability without modifying structured metadata fields.

Tags allow users to:

- Group related records
- Flag records for review
- Improve filtering and search efficiency
- Create flexible classifications across Inventories

Prerequisites

Before using Tags, confirm that you have access to the relevant Inventory and permission to apply or manage Tags. Available actions may vary depending on your role.

Before you begin

Screenshots provided in this set up guide may appear different than your Unify Records screens, either due to different permissions, field configurations, or browser settings.

Tags: A User Guide

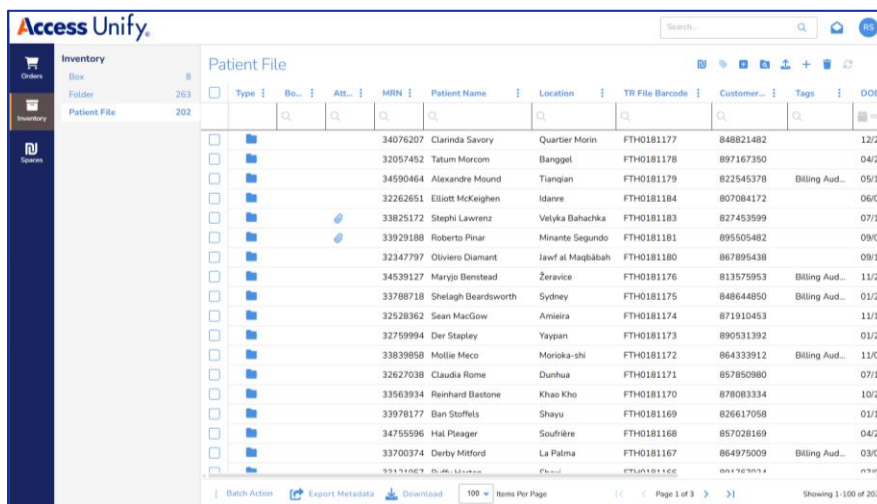
Applying Tags to Records

This section will walk through applying tags to your Inventory. In Unify Records, tags can be applied from the Inventory grid, item detail panel, or through bulk actions. A record may have multiple tags assigned.

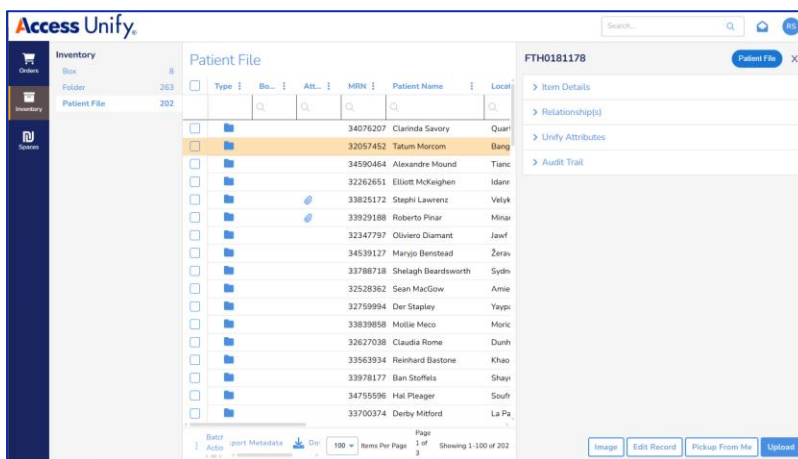
Actions – applying a tag to a single record

Action Log into Unify Records, if not already logged in.

Orientation Navigate to the Inventory that has the records you want to tag.

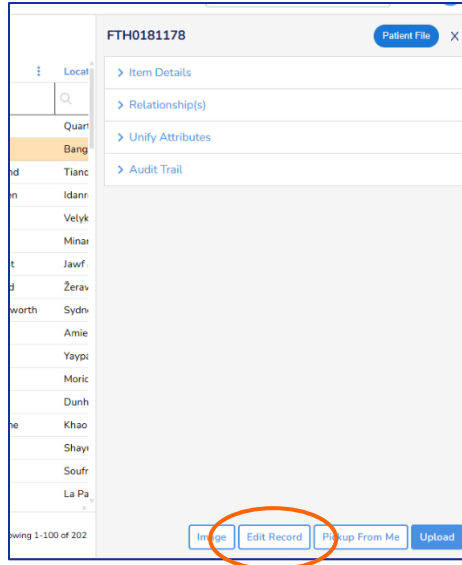


Action Click the record you want to apply a tag to and the item detail panel will appear.

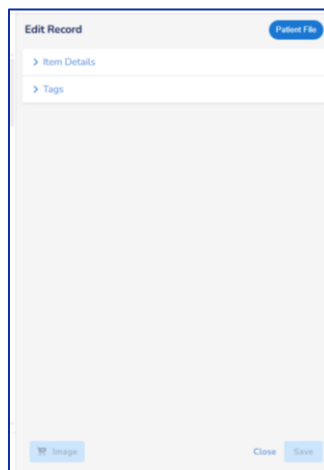


Action At the bottom of the item detail panel, click 'Edit Record'.

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Orientation The item detail panel will now be in 'edit mode'.

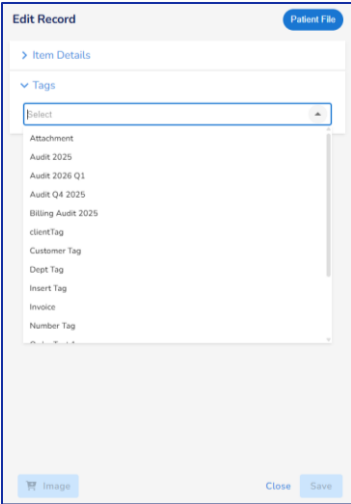


NOTE: Depending on your specific role and permissions, you may see more or less information in 'edit mode'.

Action Click the 'Tags' section to expand the section.

Action Choose a tag from the drop-down list and click 'Save'.

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Orientation A success message will appear, and the item detail panel will close. The tag will now be displayed in the 'Tags' column in the grid.

Actions – applying tags to multiple records

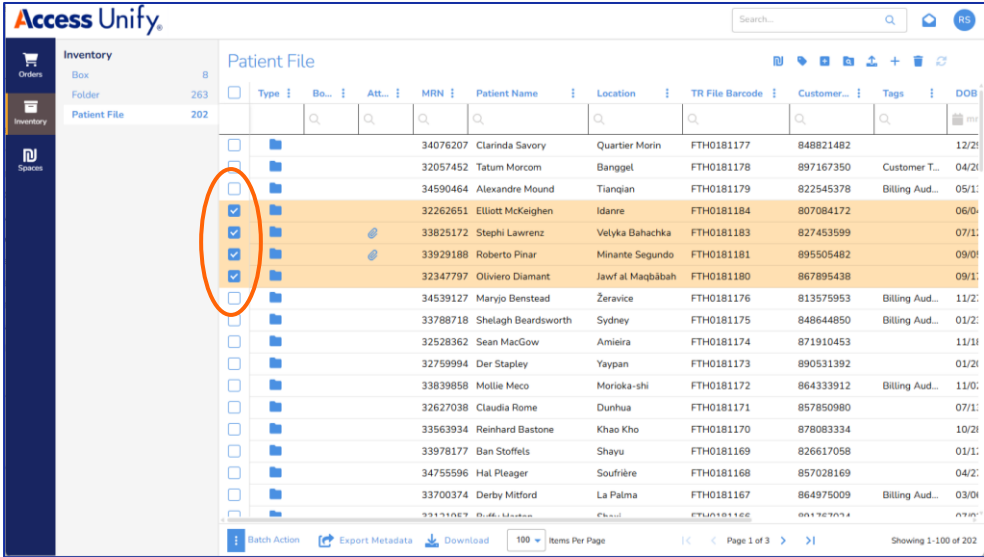
Action Log into Unify Records, if not already logged in.

Orientation Navigate to the Inventory that has the records you want to tag.

MRN	Patient Name	Location	TR File Barcode	Customer	Tags	DOB
34076207	Clarinda Savory	Quarter Morin	FTH0181177	848821482		12/21
32057452	Tatum Morcom	Banggal	FTH0181178	897167350		04/21
34590464	Alexandre Mound	Tianqian	FTH0181179	822545378	Billing Aud...	05/11
32262651	Elliott McKeighen	Idarne	FTH0181184	807084172		06/01
33825172	Stephi Lawrenz	Velyka Bahachka	FTH0181183	827453599		07/11
33929188	Roberto Pinar	Minante Segundo	FTH0181181	895505482		09/01
32347797	Oliviero Diamant	Jawf el Magbabah	FTH0181180	867895438		09/11
34539127	Maryjo Benstead	Zeravice	FTH0181176	813575953	Billing Aud...	11/21
33788718	Shelagh Beardsworth	Sydney	FTH0181175	848644850	Billing Aud...	01/21
32528362	Sean MacGow	Amieira	FTH0181174	871910453		11/11
32759994	Der Stapley	Yaypan	FTH0181173	890531392		01/21
33839858	Mollie Mecco	Morioka-shi	FTH0181172	864333912	Billing Aud...	11/01
32627038	Claudia Rome	Dunhua	FTH0181171	857850980		07/11
33563934	Reinhard Bastone	Khao Kho	FTH0181170	878083334		10/21
33978177	Ban Stoffels	Shayu	FTH0181169	826617058		01/11
34755596	Hai Pleager	Soufrière	FTH0181168	857028169		04/21
33700374	Derby Mitford	La Palma	FTH0181167	864975009	Billing Aud...	03/01

Action Click the checkbox for one or more records you wish to tag.

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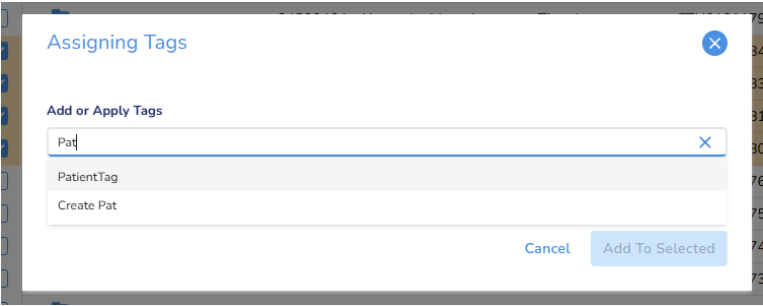


Action In the action area, click the 'Tag' icon.



Orientation A dialogue box will appear.

Action Start typing in the box to locate an existing tag or create a new tag 'on-the-fly'.



Action Click 'Add to Selected'.

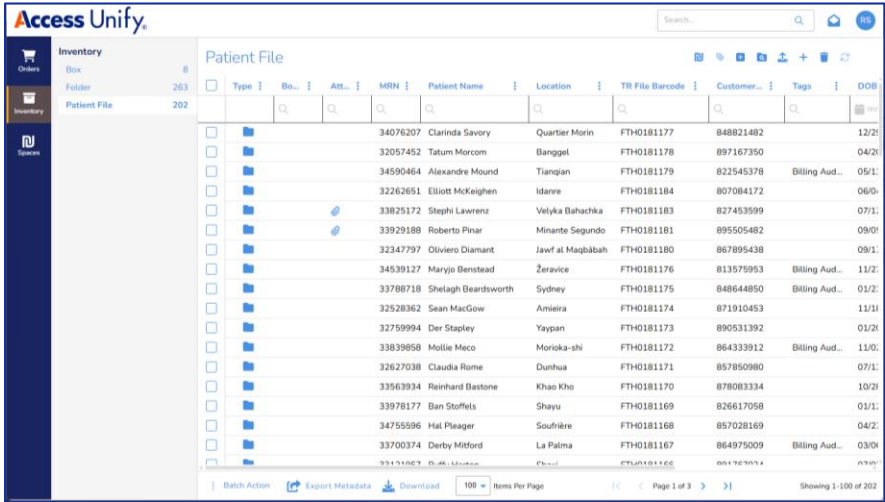
Orientation A success message will appear, and the dialogue box will close. The tag will now be displayed in the 'Tags' column in the grid on the selected records.

Actions – removing a tag from a single record

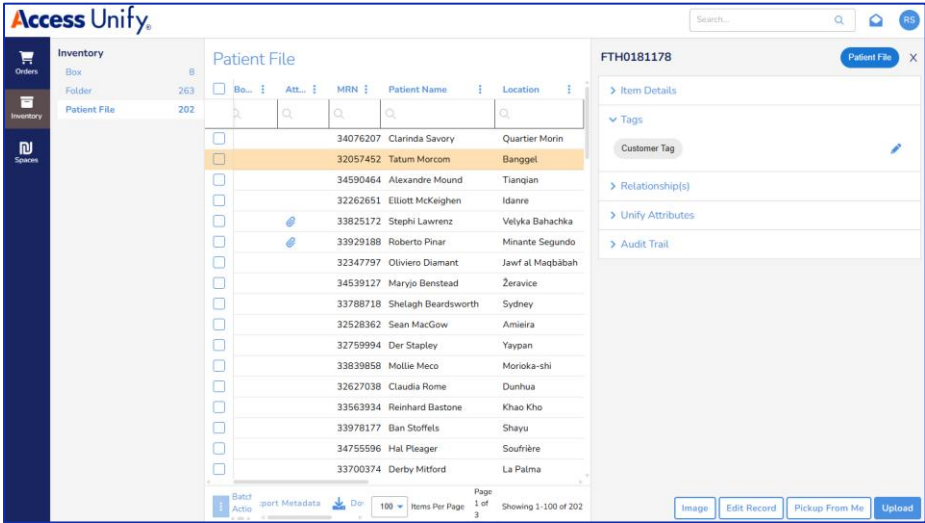
Action Log into Unify Records, if not already logged in.

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Orientation Navigate to the Inventory that has the records with a tag you want to remove.

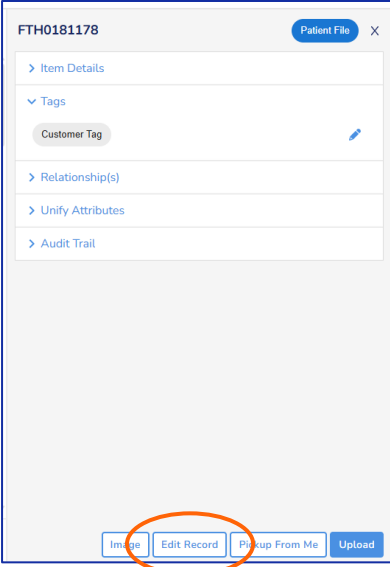


Action Click the record you want to remove the tag from, and the item detail panel will appear.

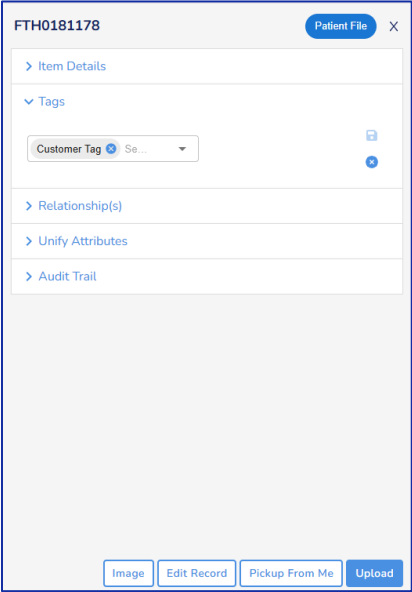


Action With the Tags section open, either click the edit icon (pencil) or at the bottom of the item detail panel, click 'Edit Record'.

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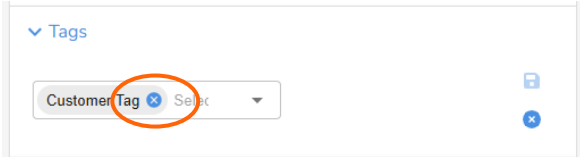


Orientation This is the item detail panel view when the edit icon (pencil) is clicked.



NOTE: If you click 'Edit Record', the item detail panel will be in 'Edit Mode'.

Action Click the 'X' next to the tag you wish to remove.



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Action Click the 'Save' icon.



NOTE: You can also search for and apply a different tag as needed.

Orientation A success message will appear, and the item detail panel will close. The tag will now be removed from the record.

Actions – removing tags from multiple records

Action Log into Unify Records, if not already logged in.

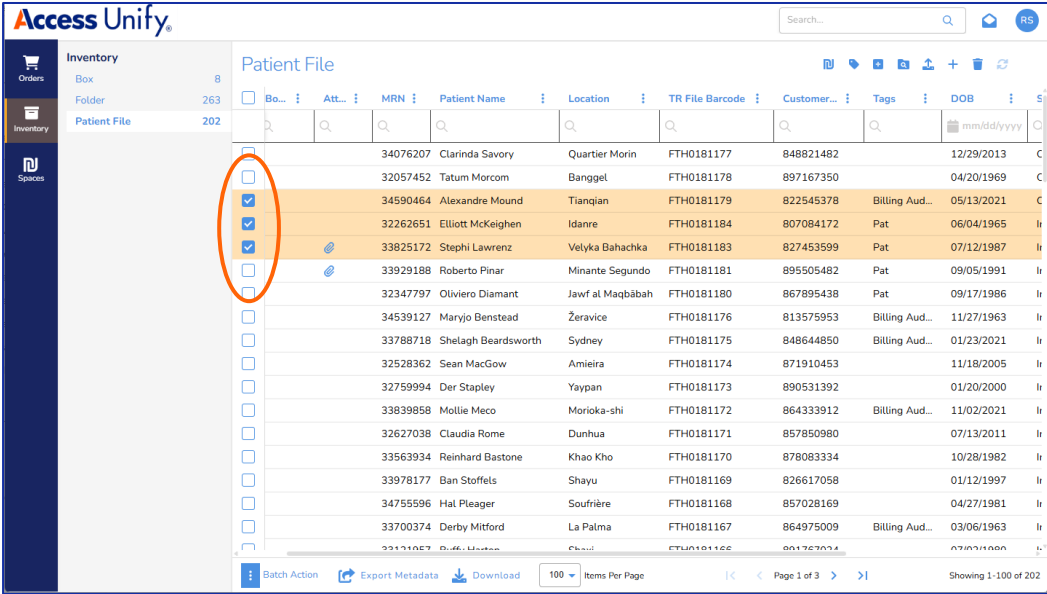
Orientation Navigate to the Inventory that has the records with tags you want to remove.

The screenshot shows the 'Access Unify' interface with a 'Patient File' inventory table. The table has columns for MRN, Patient Name, Location, TR File Barcode, Customer, Tags, and DOB. Several rows are visible, each with a checkbox in the first column. The table is titled 'Patient File' and has a search bar at the top right. The bottom of the table shows 'Batch Action', 'Export Metadata', 'Download', '100' items per page, and 'Page 1 of 3'.

	MRN	Patient Name	Location	TR File Barcode	Customer	Tags	DOB
<input type="checkbox"/>	34076207	Clarinda Savory	Quartier Morin	FTHO1B1177	848821482		12/29/2013
<input type="checkbox"/>	32057452	Tatum Morcom	Banggal	FTHO1B1178	897167350		04/20/1969
<input type="checkbox"/>	34590464	Alexandre Mound	Tianjian	FTHO1B1179	822545378	Billing Aud...	05/13/2021
<input type="checkbox"/>	32262651	Elliott McKeighen	Idanre	FTHO1B1184	807084172	Pat	06/04/1965
<input type="checkbox"/>	33825172	Steph Lawrenz	Velyka Bahachka	FTHO1B1183	827453599	Pat	07/12/1987
<input type="checkbox"/>	33929188	Roberto Pinar	Minante Segundo	FTHO1B1181	895505482	Pat	09/05/1991
<input type="checkbox"/>	32347797	Oliviero Diamant	Jawaf al Magbubah	FTHO1B1180	867895438	Pat	09/17/1986
<input type="checkbox"/>	34539127	Maryjo Benstead	Zeravice	FTHO1B1176	813575953	Billing Aud...	11/27/1963
<input type="checkbox"/>	33788718	Shelagh Beardsworth	Sydney	FTHO1B1175	848644850	Billing Aud...	01/23/2021
<input type="checkbox"/>	32528362	Sean MacGow	Amieira	FTHO1B1174	871910453		11/18/2005
<input type="checkbox"/>	32759994	Der Stapley	Yaypan	FTHO1B1173	890531392		01/20/2000
<input type="checkbox"/>	33839858	Mollie Meco	Morioka-shi	FTHO1B1172	864333912	Billing Aud...	11/02/2021
<input type="checkbox"/>	32627038	Claudia Rome	Dunhua	FTHO1B1171	857850980		07/13/2011
<input type="checkbox"/>	33563934	Reinhard Elstone	Khao Kho	FTHO1B1170	878083334		10/28/1982
<input type="checkbox"/>	33978177	Ban Stoffels	Shayu	FTHO1B1169	826617058		01/12/1997
<input type="checkbox"/>	34755596	Hal Pleager	Soufrière	FTHO1B1168	857028169		04/27/1981
<input type="checkbox"/>	33700374	Derby Mitford	La Palma	FTHO1B1167	864975009	Billing Aud...	03/06/1963

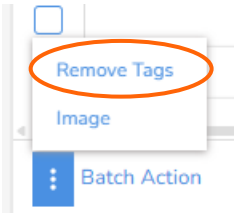
Action Click the checkbox for one or more records that have the tags you wish to remove.

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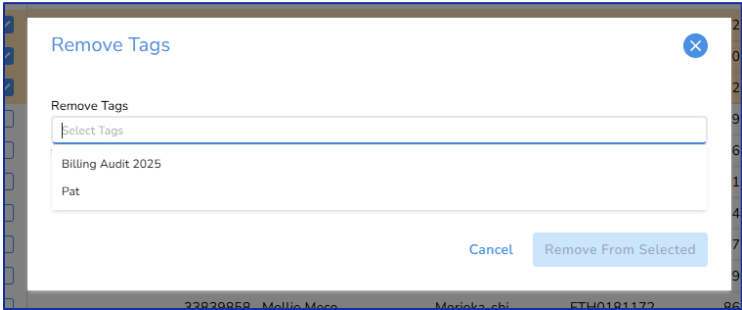
NOTE: All the selected records do not have to have the same tag.

Action At the bottom of the grid, click the 'Batch Action' menu, and select 'Remove Tags'.



Orientation A dialogue box will appear.

Action The drop-down list will display a unique list of the tags across all the selected records. Choose which tag you wish to remove.

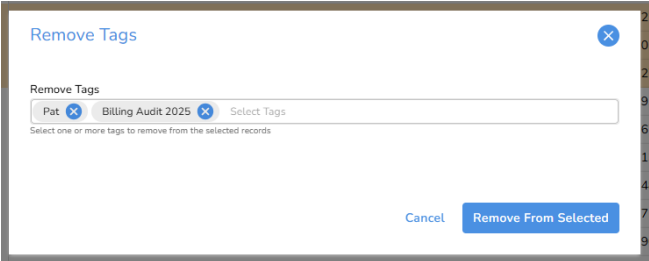


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NOTE: Multiple tags can be removed at once.

Action

Click 'Remove from Selected'.



Orientation

A success message will appear, and the dialogue box will close. The tags will now be removed from the selected records.

SUCCESS! You have successfully learned about tags.