SetTags User Manual

Version 2.3

Aug 2019

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Document Purpose

This document describes the functionality of SetTags and how to use it. Installation is described in the document Set Tags Installation.

Overview

SetTags is an application for:

1. Managing a list of applicable tags and descriptions. For Workgroup versions, only a Workgroup Master user can edit tags.
2. Loading and viewing single or multiple item (file, folder, URL or mail message) selections, with a preview of item content.
3. Tagging single files and folders by including tag names in the file or folder name, and creating a shortcut in a facet folder sub-folder with the name of the tag with the shortcut defined using a drive letter, or a UNC path.
4. Tagging single or multiple Outlook email messages from with Outlook. Tags are stored as mail categories.
5. Tagging single or multiple URLs.
6. Applying the same tag to multiple files, or files in a folder, selected by either by browsing the filesystem or from files loaded into SetTags.
7. Applying different tags to a multi-file selection on the basis of a view of the file content using a slideshow window
8. Automatically generating tags from rule based on file name, path name or content.
9. Viewing items with any tag or combination of tags as a grid list within SetTags
10. Creating a Zip archive of tagged files for export to users not running SetTags

When SetTags applies a tag (or tags) to a file or folder, it adds the tag string to the file or folder name and creates a shortcut to the file in a sub-folder of the Facet folder (see page 45 for more details). The shortcut can use a drive letter or a mapped UNC path to refer to its target. The shortcut name is the name of the original file. SetTags accesses tagged files via the targets of shortcuts contained in the Facet folder sub-folders. Shortcuts will update automatically if the target file is moved or renamed. Deleting a tag from a file removes the shortcut pointing to the file in the Facet folder sub-folder, or the file itself and removes the tag from the file name in its original location. Tags for Outlook emails are stored in the local database and are shown in Outlook by defining Categories with the tag names and applying these to tagged files so they are visible in Outlook. Tags for URLs are stored in the network database.

Tagging of files and folders can be performed by selecting multiple files or single folders in Windows Explorer and sending them to SetTags via a right-click on the selection, or by dragging them into the application. Files and folders can also be selected from within the SetTags application. Tags then can then be applied to all the loaded data or selection from it. Tags can be added to individual files by dragging from the tag list to a file list. Emails can be tagged from within Outlook after installation of the Outlook Add-in OutlookTag.

Most tag operations can be performed by right-clicking in the Tags box to show a context menu. View options access this functionality via buttons in the Input Data Actions and View boxes.

SetTags can operate in multi-user mode using either a shared network drive or cloud storage. User access to tags and items containing a particular tag, and the management of the tag list, can be controlled.

SetTags requires Windows 7 or newer (64-bit operating system) with .Net 4.6.1 Framework, and the Desktop application SetTags.exe is a 32-bit application.

Usage Scenarios

Multi-User Operation

SetTags can be used with multiple users accessing the same group of documents in two modes.

Cloud mode operates only when files and folders are shared between users by a cloud service such as OneDrive, Google Drive or Dropbox. There is no central management of tags by default – any user can delete, add to or edit tags. When this happens, other users are notified and need to restart SetTags to see the changed tags.

Workgroup operation is discussed in more detail on page 52.

Cloud Operation

Most cloud storage providers offer the option of storing cloud files in a local folder, which is then synchronised with a folder stored on the remote cloud server. Folders can be shared by the cloud folder owner via a Web page, using the process described here for Microsoft OneDrive.

In order to use Cloud functionality, the facet folder and all files and folders to be tagged must be within a local folder synchronised with cloud storage. A warning message is shown if files being tagged are not within the specified cloud folder.

As SetTags functionality requires a particular facet folder structure and the implementation of Windows shortcuts, selective sharing of files with particular tags on any platform is not possible via OneDrive. If folders containing input files and the facet folder are stored in the OneDrive local folder and all OneDrive access is from Windows devices, SetTags can be used by multiple users, and changes made to any tags will be synchronised to all other SetTags user.

If OneDrive is used from a non-Windows device, any folders containing tagged files can be shared with specific users via the email address which they use for OneDrive authentication. The facet folder should not be shared, as the shortcuts contained in it will not work. Tagged files can then be located using Search functionality on the device. Any changes to the content of these files will then be synchronised back to all other OneDrive users with access to this folder. All OneDrive users will be notified of any changes to file content. The tag name (included in the file name) should not be changed.

If access to files with selected tags needs to be restricted in a OneDrive environment, the only way to achieve this is to restrict the sharing of folders containing input files with selected tags. The flexibility of access control for files and folders provided by the Windows filesystem is not available for cloud storage.

Dropbox allows access control of folders with the free version, but all users must have Dropbox installed, whereas OneDrive is built into Windows 10. As each user accesses their own local tag database, any user can edit the tag list in the local cloud folder unless this permission is

restricted. If the tag list is changed by any user, other users will be warned to restart SetTags in order to use the updated tag list.

Scanned Documents

Applying some kind of descriptive metadata to scanned documents is essential if the scanned documents are to be accessed effectively. Optical character recognition (OCR) may be applied to create searchable content in the scanned files (usually in PDF format) but PDF content is not yet routinely indexed on Windows filesystems. The quality of the OCR may also be poor on documents with coloured backgrounds, typewriter fonts or low-contrast printing. Descriptive file and folder names are frequently used to allow systematic access to scanned documents, but these have limited descriptive capacity. Documents frequently have multiple attributes which are of interest, which can be easily added as tags.

Scanning of paper documents is frequently performed as a service, where the scanned documents are sent to an external agency which may not have software required to access documents via their tags. SetTags export functionality creates a folder tree from the tag structure with folders populated with documents having a particular tag. This allows recipients of the exported documents to utilise the tag structure without any additional software or training, and also to add tagged documents to their own SetTags instances if required.

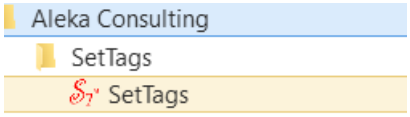
Organisational Document Management

Organisations of all sizes have problems retrieving documents relating to particular issues. In the not-for-profit area, high staff turnover and financial stringencies compound the problem. While free document management systems exist, new staff are most comfortable working with systems they are familiar with. SetTags simple interface and close integration with Microsoft Windows ensures that new staff can quickly become familiar with application of tags to documents and retrieval on the basis of tags.

If a shared network drive is used, the Workgroup version provides access control for tagged documents. For cloud-based sharing, the Cloud version provides this functionality.

Installation, Running and Uninstallation

The self-extracting installer SetTags_nn.exe (where nn is the version number) should be downloaded from the Aleka Consulting web site. Double-click on the downloaded file to install the program. Select the option to launch the program after installation as this will create the option to send files to SetTags via a right-click.
The program can be found in the Aleka Consulting->SetTags folder in "All Programs" as shown below:



If desired the program can be pinned to the Start menu by right-clicking on the program and selecting Pin to Start Menu.

Tagging Emails using OutlookTag

If tagging of emails from Outlook is required, the following steps should be followed:

1) Download the OutlookTag.zip file and extract its contents into a convenient folder.
2) If Outlook is running it, close it and check that Outlook.exe is not running by showing the Processes tab of Task Manager or the Details Tab in Windows 10. Select "End Process" after right-clicking on Outlook.exe in the Task Manager list
3) Then click on the extracted file OutlookTag.application. This will install the OutlookTag Add-In**.** The installation process should complete with the message "Registration successful".
4) Restart Outlook. The start screen should indicate when the different Add-Ins are loaded. After loading OutlookTags the main screen and message screen should appear as shown in the section Loading Items from Outlook on page 24.

SetTags must be installed and run before OutlookTag is installed. Installation of the Add-In before SetTags Desktop is installed and run once will result in a warning message and the Add-In buttons being disabled.

SetTags and OutlookTag may be uninstalled from the Control Panel->Programs and Features list in the same way as any other application.

Administrator and non-Administrator Users

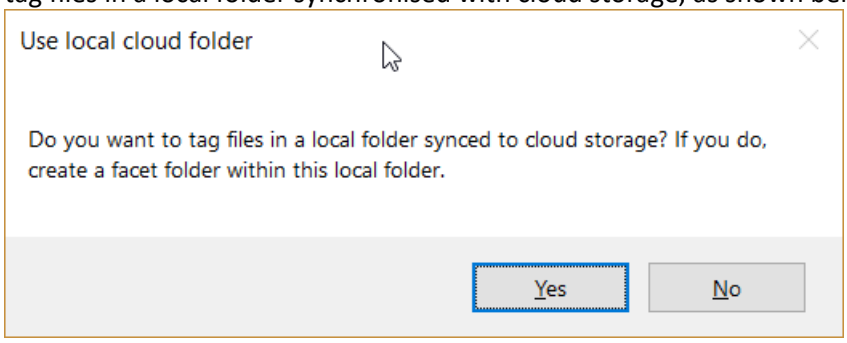
Installing SetTags on a machine from a user account with Administrator privileges will make the program accessible to all users of the machine. However, unless the program is run from an Administrator account, or as an Administrator, no shortcuts will be created in the default facet folder location (C:\Users\<UserName>\AppData\Roaming\SetTags\Facets). A warning message will appear if the default Facet Folder location is used with a non-Admin account. A different facet folder location should be specified in this case.

Desktop Operation

First Run

After installation, a Demo Cloud license is automatically created when SetTags is run (either by clicking the Program entry or by sending selected files to SetTags via right-click Send->SetTags), which expires 30 days after installation or when 100 items have been tagged. A Demo license can only be used once. Contact Aleka Consulting if a second Demo license is required.

When SetTags is first run with a Demo Cloud license, the user is prompted to ask if they wish to tag files in a local folder synchronised with cloud storage, as shown below:



If the answer is yes, the following screen is shown. The screen is always shown for a non-demo Cloud license.

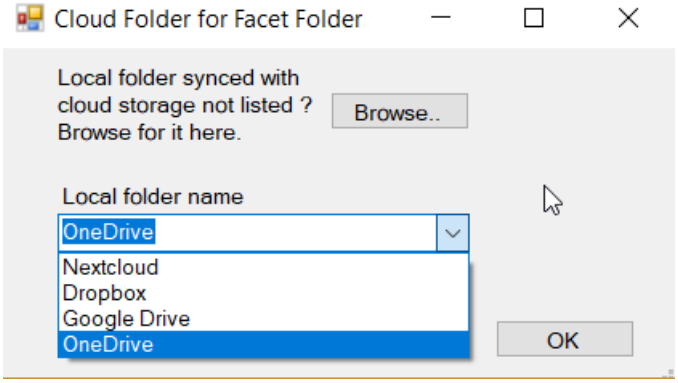


Figure 1 Selecting local cloud storage folder

This screen allows the local folder synchronised with cloud storage to be selected. If the name of the folder is not shown, it can be selected via the Browse button from the user directory. A facet folder is created in the selected folder.

If the answer is No, the screen shown in Figure 1 is not shown and the License type becomes Desktop. Demo licenses may be selected as either Cloud or Desktop via the Options screen as shown below:

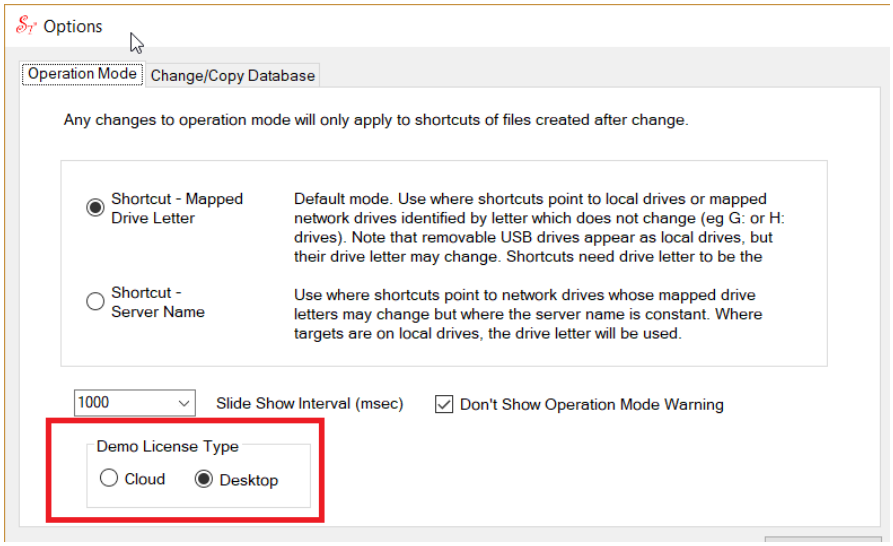
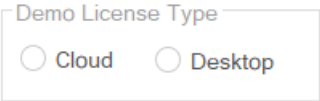


Figure 2 Selecting the Demo License Type

The Demo License options are disabled for non-Demo licenses.



Licensing

If a license key has to be installed for SetTags, or the database used by it has to be changed, this is done by clicking on the License top level menu to show the following screen:

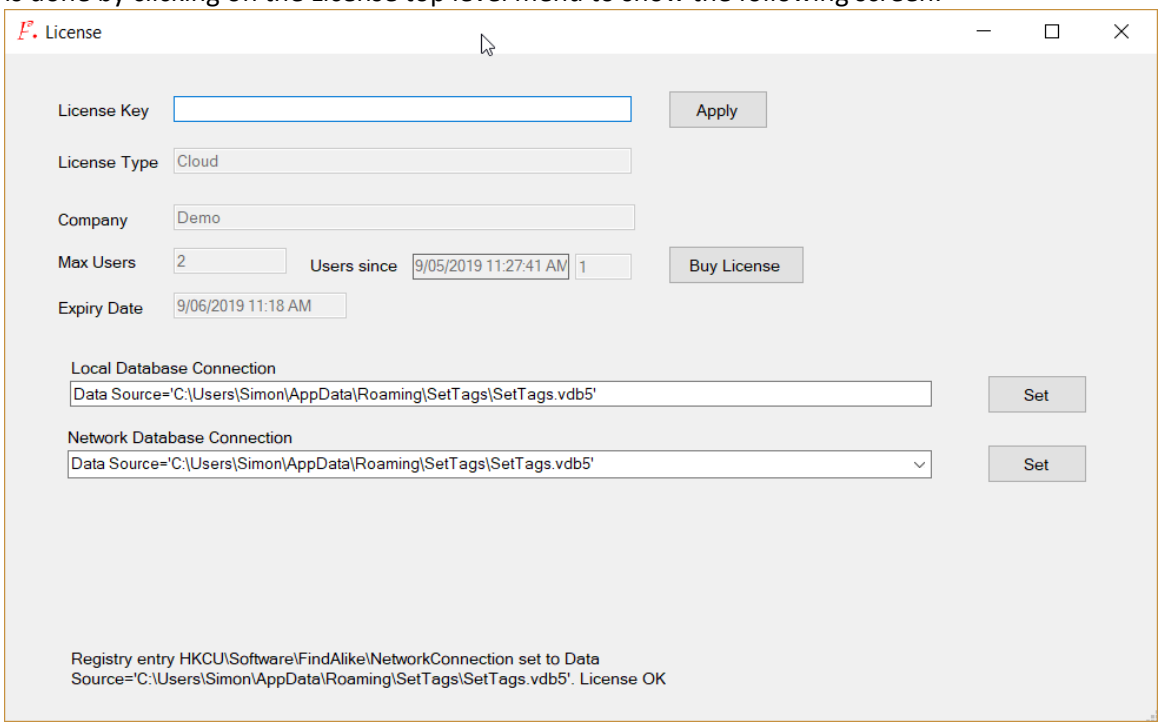


Figure 3 Licensing screen

Any license key received is entered in the License Key text box and the Apply button clicked. License details are then shown. When a license expires, only the License top-level menu item remains accessible to allow entry of a new license code.

For multiple users, the maximum number of users over the last 24 hours is defined the Max Users box. The current number of users over the period is shown to the right of it. If the maximum number is exceeded, SetTags becomes unlicensed and non-operational until the number of users over the previous 24 hours has dropped below the limit.

The local database connection is set by default on installation, but can be redefined if required. The Network Database connection is the same as the local database connection for Demo and Desktop licenses. It may be different for Workgroup licenses. Workgroup operation is described on page 50.

Start Screen

Once a valid license has been obtained, the SetTags main screen appears, with the following default appearance:

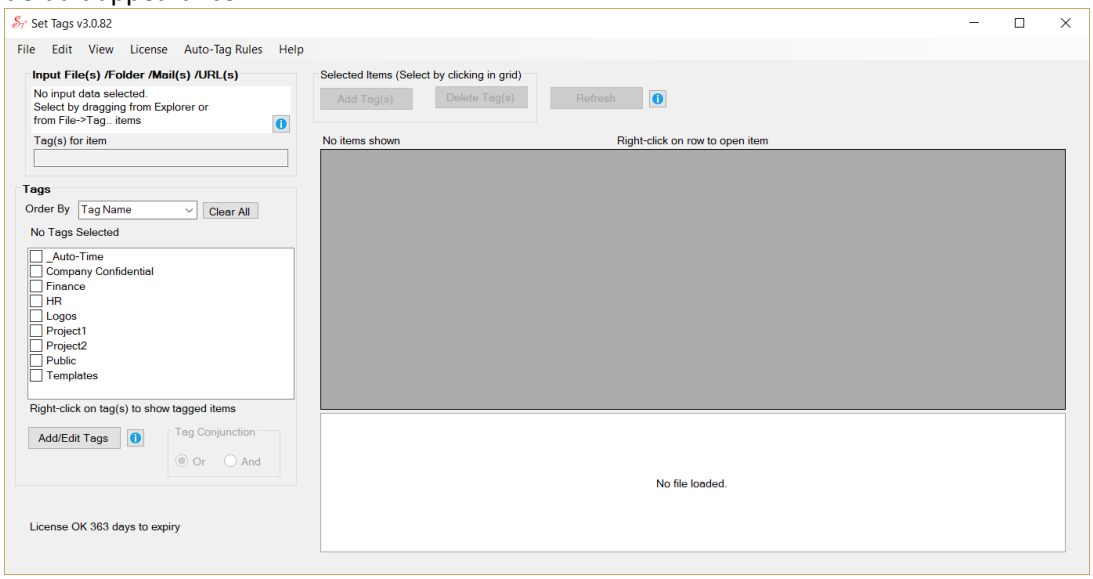


Figure 4 Default SetTags main screen on loading

Tags may be ordered by Name, Description or by the oldest modified date of files with that tag using the Order By combo box. The Clear All button clears all selected tags. The number of days before license expiry is shown below the tag list. More information on each enabled control can be obtained by hovering the mouse over the control or clicking the Information button beside it.

View Options

The Input Data Actions and View boxes may be shown or hidden using the View->View Box and View->Input Data Box options. The main functionality provided by the buttons in each box can be accessed by right-clicking in the Tags box.

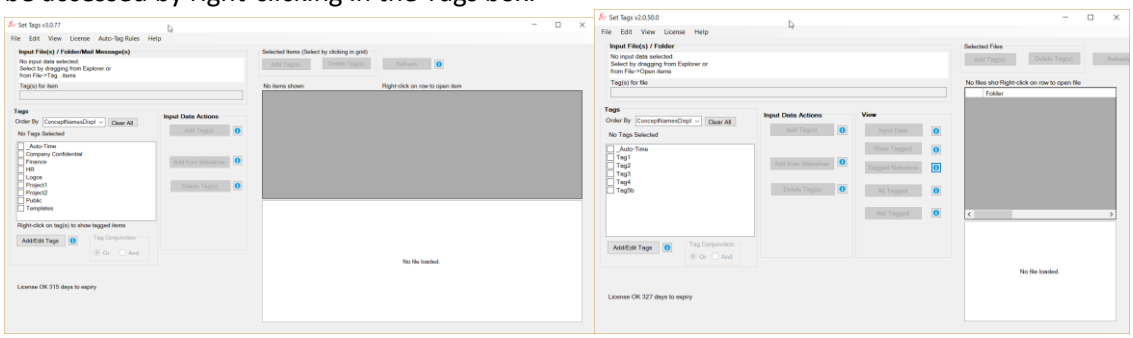


Figure 5 Other view options showing Input Data Actions (left) or Input Data Actions and View boxes (right)

If a tag is selected and one or more item loaded, the “No Tags Selected” region above the tag grid turns white and indicates that dragging tags onto a file selected from the grid is enabled. The grid shows the input item properties. Different icons in the Type column are shown for files, folders, mail messages and URLs.

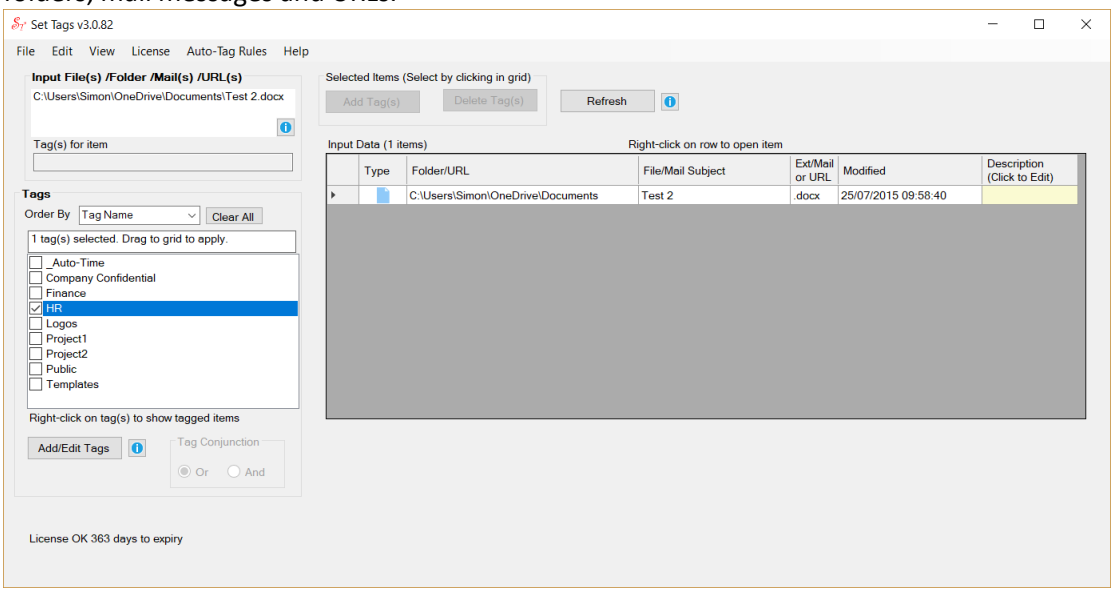
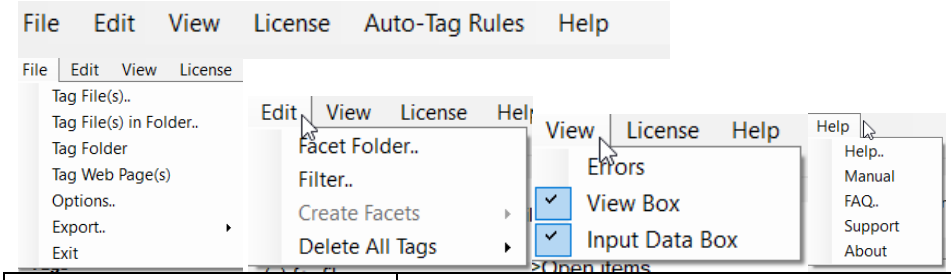


Figure 6 Drag box above tag list enabled after tag selection and input file loading.

Menu Items

Menu and sub-menu items are shown below:



Menu Item	Description
File->Tag File(s)..	Loads single or multiple files. See Loading .
File-> Tag File(s) in Folder	Loads files in or below folder
File-> Tag Folder	Loads single folder
File-> Tag Web Page(s)	Loads URLs of Web pages by pasting
File->Options..	Sets operation parameters. See Options Screen.
File->Export..	Exports tagged files. See Exporting Tagged Files.
File->Exit	Closes SetTags.
Edit->Facet Folder	Shows/sets Facet folder. See Facet Folders.
Edit->Filter	Sets filter for including or excluding files to tag. See Tag Filter.
Edit->Create Facets	Create Facet folder from tags in file names. See Creating the Facet Folder.
Edit-> Delete All Tags	Delete all tags from all tagged files or input selection. See Delete Operations.
View->Errors	Show errors in operation. See Errors.
View->View Box	Show or hide View box
View-> Input Data Box	Show or hide Input Data Actions Box
License	Show or set License and databases. See Licensing.
Auto-Tag Rules	Define rules for auto-tagging
Help->Help	Show help
Help->Manual	View manual as PDF file
Help->FAQ	Show Frequently Asked Questions as PDF file.
Help-> Support	Prepare and optionally mail support data.
Help->About	Version information for SetTags.

Adding and Editing Tags

A number of pre-defined tags are included in the initial database. These can be deleted or renamed as required (except for _Auto-Time).

Tag Name	Description
Company Confidential	Confidentiality
Public	Confidentiality
To Do	Status
Project1	Projects
Project2	Projects
Templates	Communications
Logos	Communications
HR	Organisation

Finance	Organisation
_Auto-Time	Automatically generated from metadata

Auto-Time Tag

If _Auto-time is checked, a tag is generated from the file Modified date in the form YYYY –MM (MMM) (eg 2014-1 (Jan)) and applied automatically to the file. Files with the same month of modification are assigned the same tag. If the Move Operation mode is chosen, the files can be moved into folders with names representing the year and month of modification. This format means that folders sorted by name will be in date order as shown below:

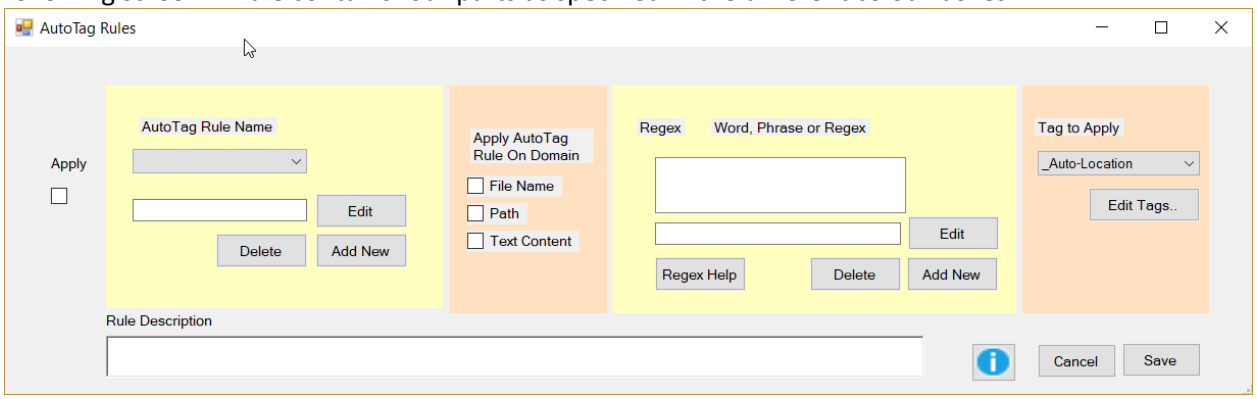
Name	Date modified	Type
2017-09 (Sep)	07/09/2017 10:33	File folder
2015-09 (Sep)	07/09/2017 11:46	File folder
2015-08 (Aug)	07/09/2017 11:45	File folder
2015-07 (Jul)	07/09/2017 11:39	File folder
2015-06 (Jun)	07/09/2017 11:33	File folder
2015-05 (May)	07/09/2017 11:28	File folder
2015-01 (Jan)	07/09/2017 11:28	File folder
2014-12 (Dec)	07/09/2017 11:28	File folder
2014-11 (Nov)	07/09/2017 11:28	File folder
2014-10 (Oct)	07/09/2017 11:28	File folder

Figure 7 Date ordering of folders after Auto-Time tag generation

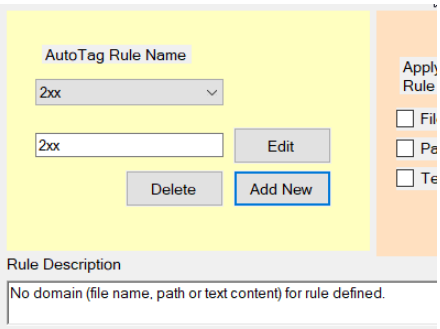
Files can then be selected from these folders for subject-based tagging.

Auto-Tag Rules

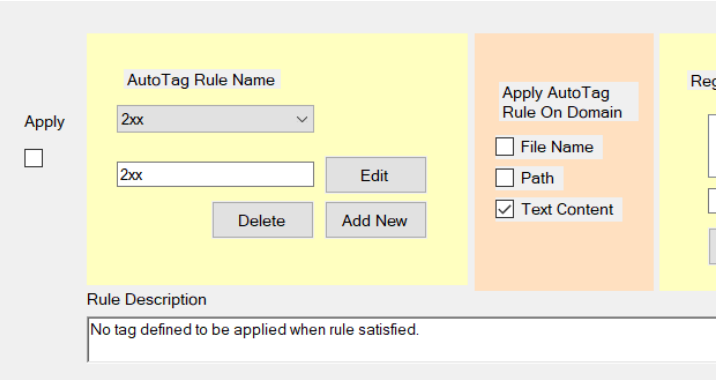
Auto-Tag rules can be used to set tags on the basis of text found in the file name, file path or content. The rules are specified by clicking on the Auto-Tag Rules menu item to show the following screen. A rule contains four parts as specified in the different colour boxes.



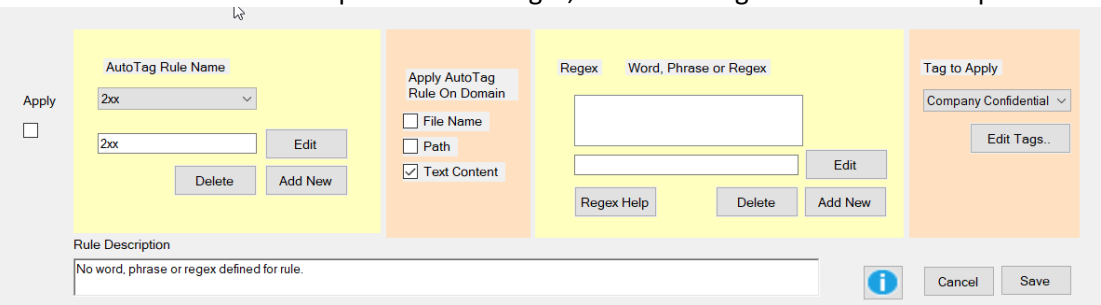
The first step is to define a name for the rule by typing into the text box below the AutoTag Rule Name box and clicking Add New:



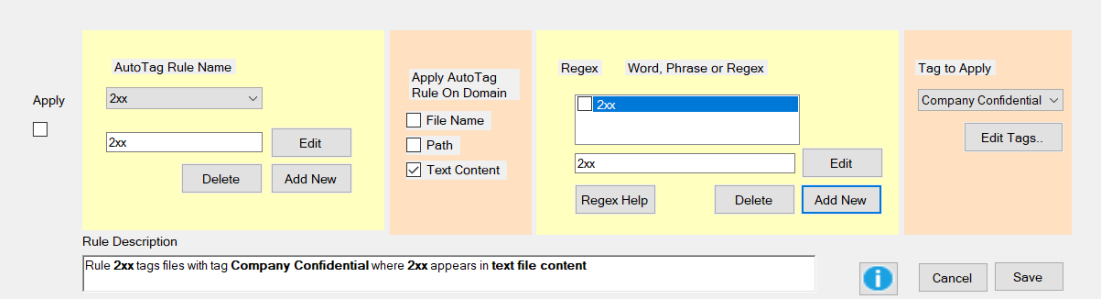
The Rule Description box then reports that a domain for the rule has not been defined. The available domains are the file name, the file path and the text content, which can be selected from the check boxes below "Apply AutoTag Rule On Domain". If the file does not contain any text, the rule will never be satisfied.



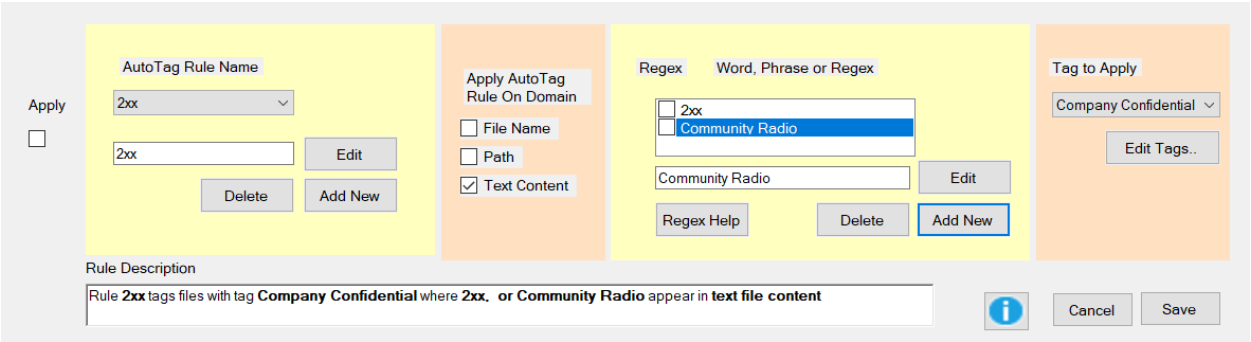
The Rule Description box then prompts for the tag to be added when the rule is satisfied. This can be entered from the dropdown on the right, and a new tag can be added if required.



The Rule Description box then prompts for the addition of a word, phrase or regular expression (Regex) to complete the rule. These should entered in the white text box to the left of the Edit button, and Add New clicked. The entered text then appear in the list box above the text box, and the Rule Desciption shows the complete rule with components shown in bold as below:



Additional words, phrases or regular expressions can be added by repeating this process:



If any of the words or phrases entered appear in the selected domain (or domains), or if the regex is matched, the selected tag is applied.

If a regular expression has been entered, the Regex checkbox to the left of the expression should be checked.

Once the Rule Description contains elements shown in bold, the rule may be saved using the Save button in the bottom right-hand corner of the screen. Clicking cancel (or closing the form) discards all changes made to the rules since the screen opened. If the Save button is clicked without all four components of the rule being satisfied, a warning message is shown and the incomplete rule is not saved.

Checking the Apply check box applies the rule when the Auto-Tag option is selected from the main screen.

If more than one rule is defined, rules can be selected for editing from the dropdown in the Rule Name Section

Regular Expressions (Regexes)

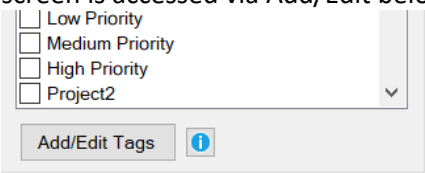
Regular expressions (or regexes) are a sequence of characters that define a very flexible search pattern rather than the simple keyword search used in most search engines. The syntax can be extremely complex, but some of the most common requirements are to:

- match an occurrence of a search pattern at the start or end of a string
- match the negation of string (satisfy a rule when a string does not appear)
- match a range of letters or numbers

There are number of web sites offering regex information, tutorials and expression checkers:
Wikipedia – information
Regex101 – expression checker
Expresso –Windows Desktop expression checker and tutorial
Regular-Expressions.info - tutorial

User Tags

A set of tags which can be applied to items can be pre-defined before any items are processed, or tags can be defined on the fly after a group of items has been selected. The Tag Management screen is accessed via Add/Edit below the tag list:



The tag management screen is as shown below:

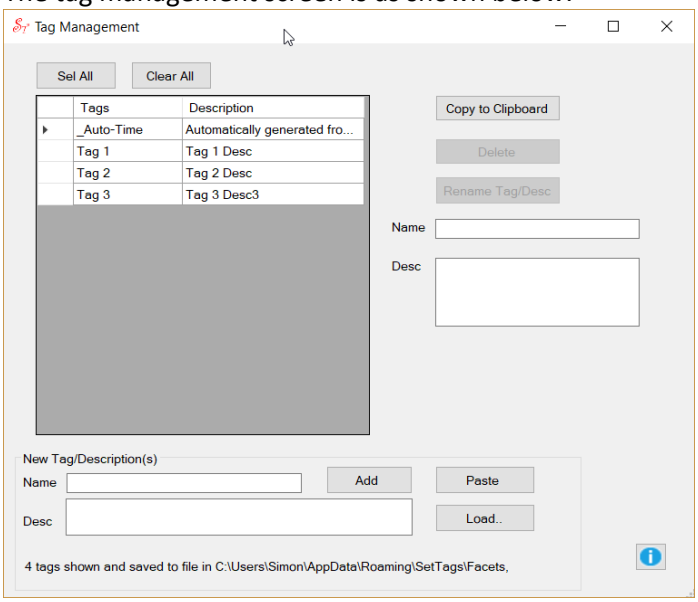


Figure 8 Tag Management Screen

The _Auto-Time tag is always present and cannot be deleted. Tags can be added by typing a tag name (and optionally Description in the Desc box) into the box to the left of and below the Add button. Multiple tags can be added by pasting a list of tag names and descriptions from the clipboard using the Paste button. The names are separated by a new line and the name and description are separated by a tab character. Any existing tags are replaced. New tags can also be updated from a text file containing the same data (and the shortcut mode being used) via the Load button. Files containing all tags and descriptions for a particular set of facets are shown in the facet folder with the name TagNameDesc.txt.

Tag names cannot include commas or any characters not allowed in Windows file or folder names as follows:

< (less than)
> (greater than)
: (colon)
" (double quote)
/ (forward slash)
\ (backslash)
| (vertical bar or pipe)
? (question mark)
* (asterisk)
Tab

The strings !TS! and !AT! are also reserved and cannot be used.

If you need to copy the list of tags and descriptions, these can be transferred to the Clipboard by clicking the Copy to Clipboard button. A list of the tags (and the Shortcut Mode) is saved in the Facet folder in the file TagNameDesc.txt. This is updated whenever a tag is changed.
Once tags and descriptions are added, tags and/or descriptions can be changed or deleted by selecting them and using the appropriate buttons. The Select All and Clear All buttons can be used to select or unselect all entries.

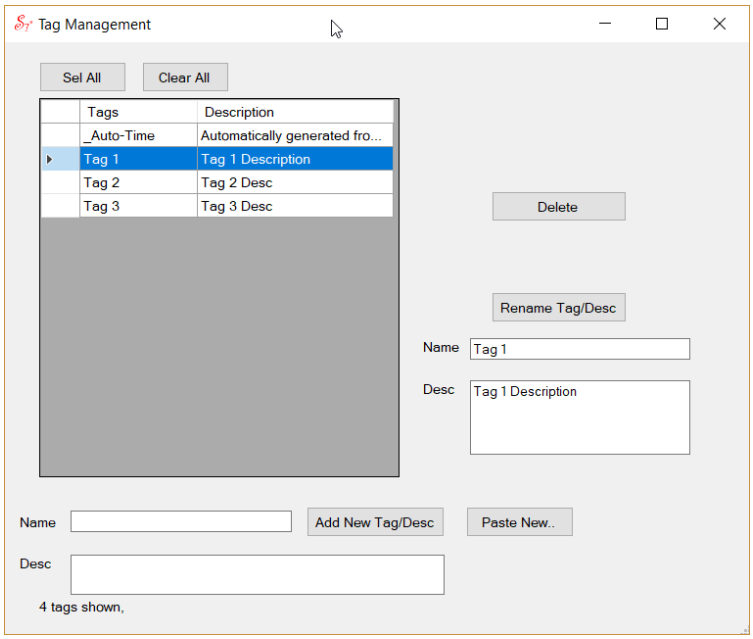


Figure 9 Renaming and deleting tags/descriptions

When deleting or renaming tags, the option to only change tags in the tag list or to change the tags already applied to items is shown:

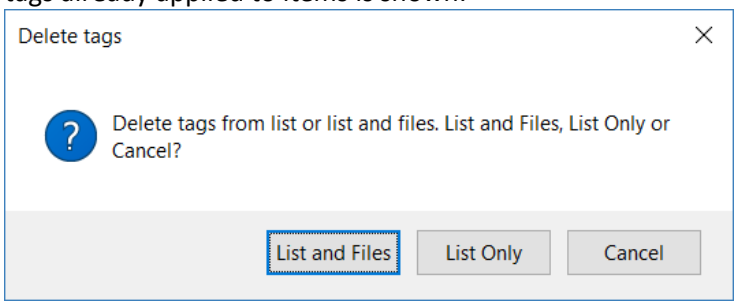


Figure 10 Option to delete files from list only or from list and files

On closing the User Tag screen (by clicking on the X at the top right of the screen) and returning the main screen, the tags are available for selection and application. The tag descriptions appear when hovering over the tags:

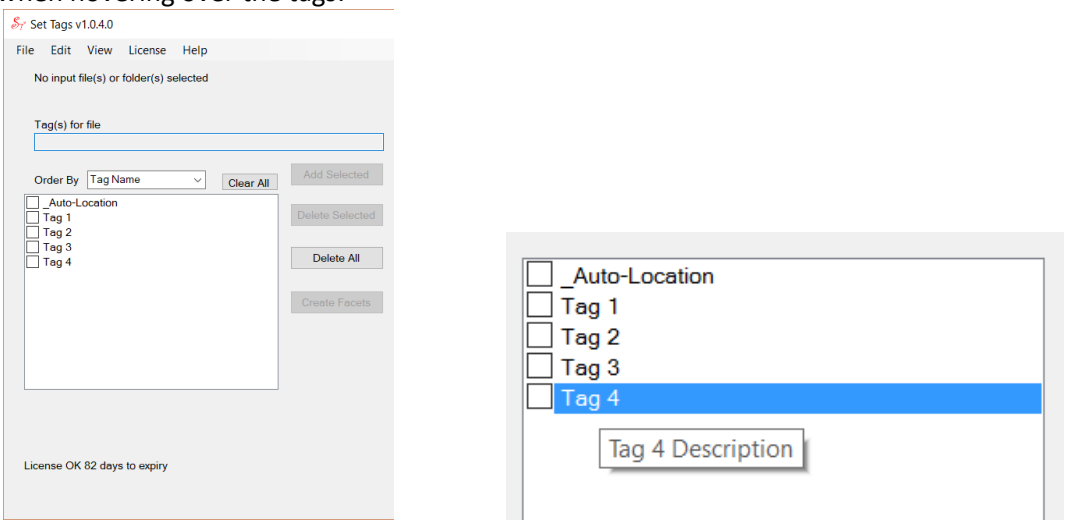


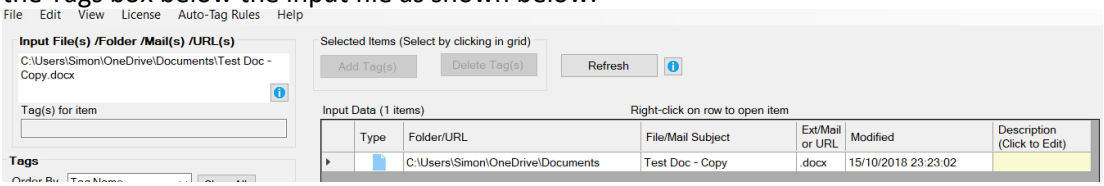
Figure 11 Main screen after tag definition (left) and tag description display when hovering over tag (right)

Loading Items

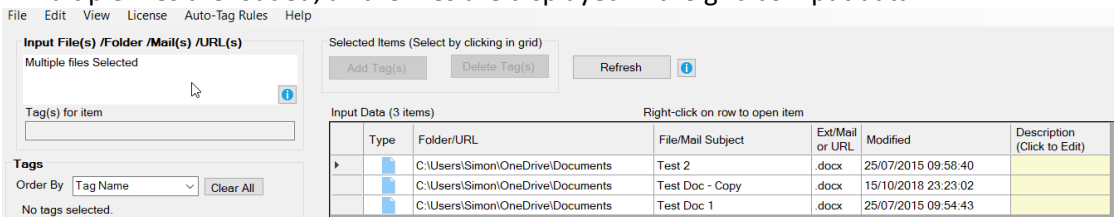
Files and folders can be loaded either from within the application or from Explorer by right-clicking and selecting Send To-> SetTags. URLs can be loaded from within the application.

Loading From Application

Files or files in or below a folder to be processed can be selected from the File->Tag File(s).. and File->Tag File(s) in Folder.. menu options. If a single file is loaded, any tags applied are shown in the Tags box below the input file as shown below:

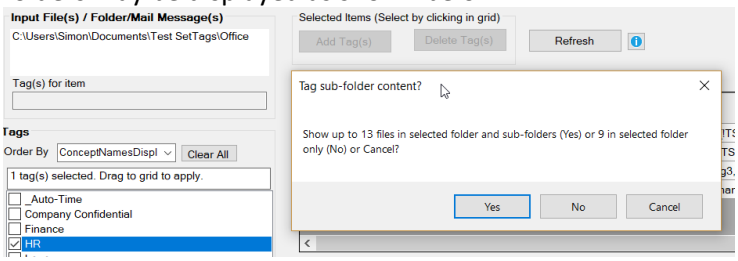


If multiple files are loaded, all the files are displayed in the grid as input data:



The icon in the Type column indicates whether the item is a file (blue file icon), a folder (yellow folder icon), a mail message (black mail icon), or URL (black globe icon).

If a folder is loaded via Tag File(s) in Folder, files in the folder, or files in the folder and sub-folders may be displayed as shown below:



If the option selected displays a very large number of files, the loading process may take some time. The number of files loaded is shown below the tag list. Loading can be terminated by clicking the Stop Loading button, which is displayed during loading.

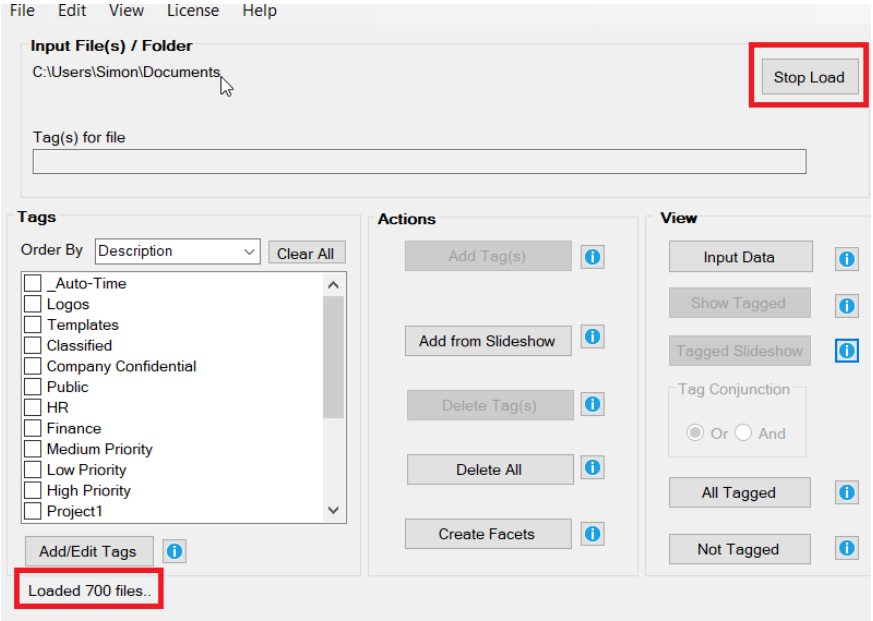


Figure 12 Loading from a folder with a large number of files

After selecting Yes or No, the files are displayed in the input data grid. Grid content can be sorted by any of the displayed columns by clicking in the column header. Grid column widths can be changed by dragging the column boundary.

Once input files are displayed in the grid, tags may be added or removed or the display filtered as described in following sections.

Loading Folders

Single folders may be loaded via the File->Tag Folder option. Loaded folders are shown with a yellow folder icon as shown below. Folder are processed in the same way as file, with a tag string being added to the folder name.

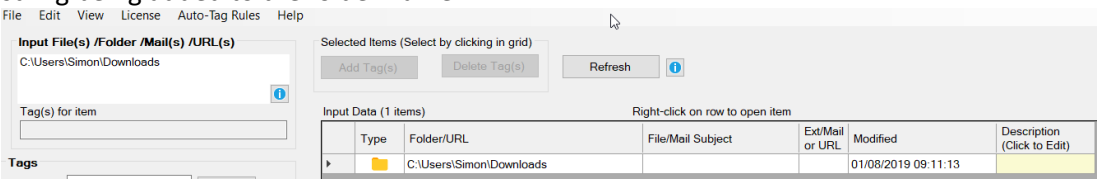


Figure 13 Folder loaded for tagging

Loading URLs

URLs can be loaded by pasting the URL of a web page into the screen shown by selecting File->Tag Web Page(s):

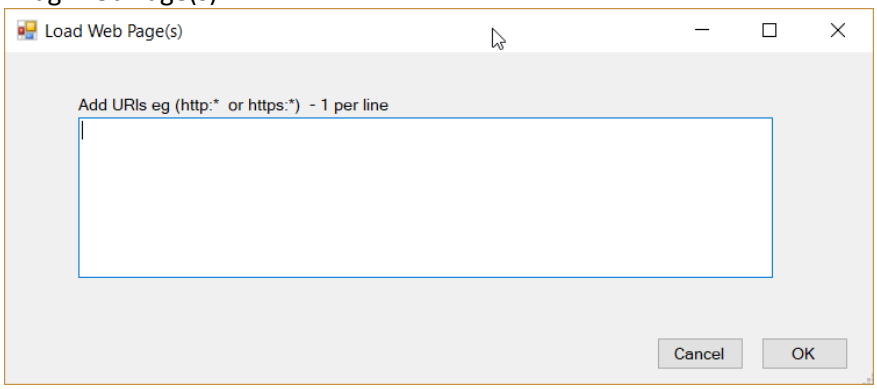


Figure 14 Screen for loading URLs of Web pages

The URL of a web page can be copied to the Clipboard as shown below

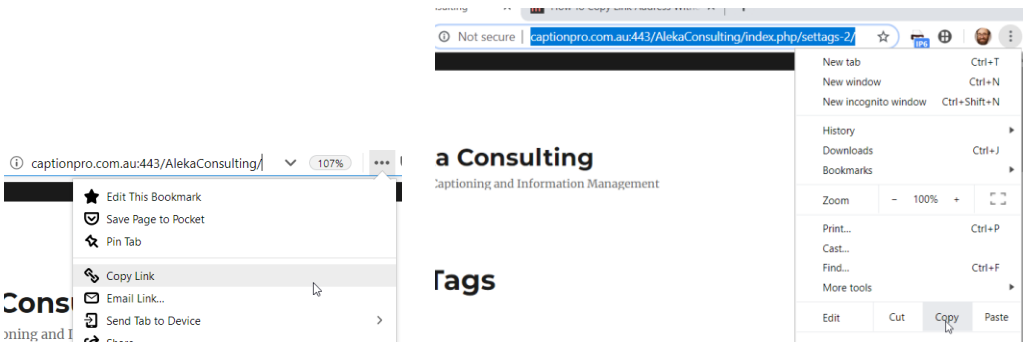


Figure 15 Copying URLs from Firefox (left) via menu option and from Chrome (right) via select/copy

If the browser screen and the SetTags screen are both visible, URLs can also be loaded by dragging the ⓘ icon at the left of the address bar onto the white Input File(s) box.

Loaded URLs appear as shown below

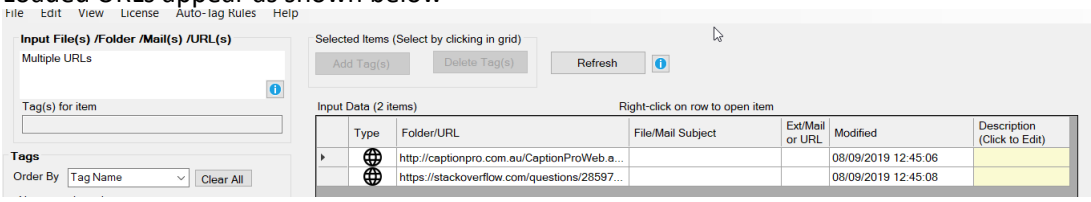
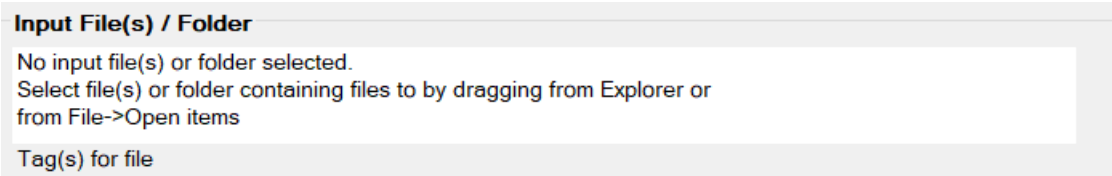


Figure 16 Loaded URLS

Loading Files and Folder Content from Explorer

Single or multiple files, or the file content of single folders can be loaded by from Windows Explorer by selecting the group of files or a single folder for tag addition or removal and dragging them onto the white Input Files/Folder box in the main screen.



Items can also be loaded by right-clicking and selecting Send To as shown below:

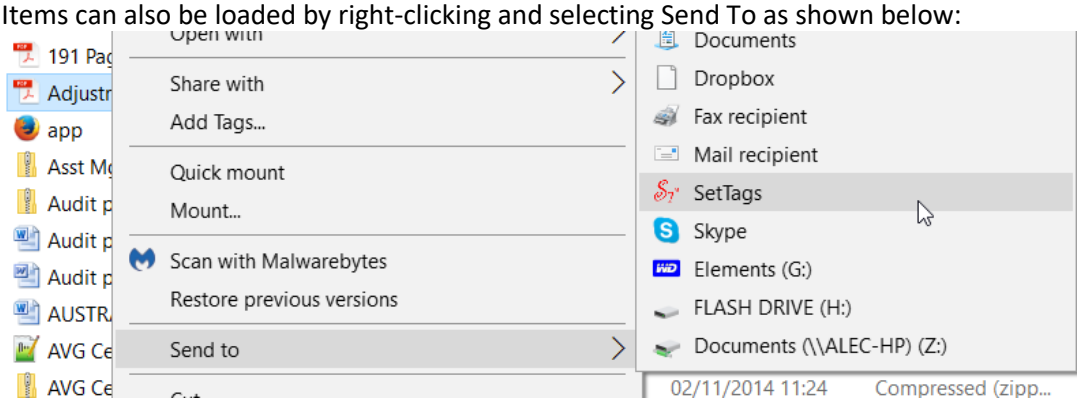


Figure 17 Example of item selection by right-clicking on Windows Explorer selection

The main SetTags screen then shows whether a single file or folder, or multiple files have been selected.

Loading Items from Outlook

After installing the OutlookTag Add-In, Mail messages and Contacts can be tagged.

Mail Messages

Mail messages can be loaded from the main Outlook window via the Tag Selected button in SetTags tabs in the ribbon as shown below.

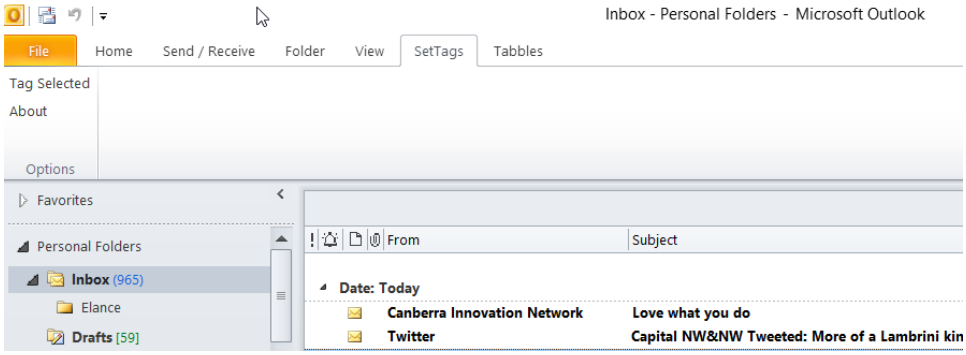


Figure 18 Loading single or multiple email messages from Outlook main window

Any messages selected appear in SetTags as shown below. The date is the date on which the email was sent.

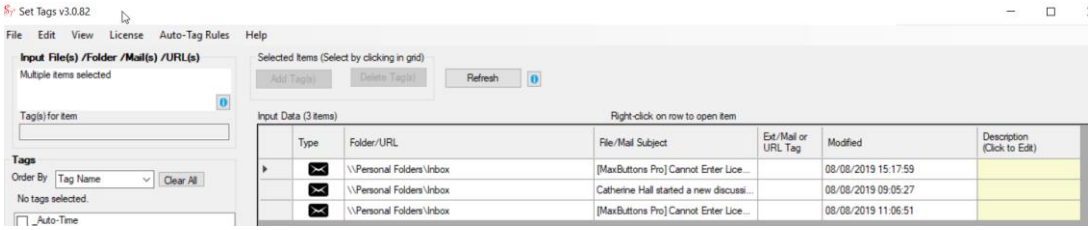


Figure 19 Mail messages loaded into SetTags from Outlook

Single messages can also be loaded via Tag Message button in the Message window

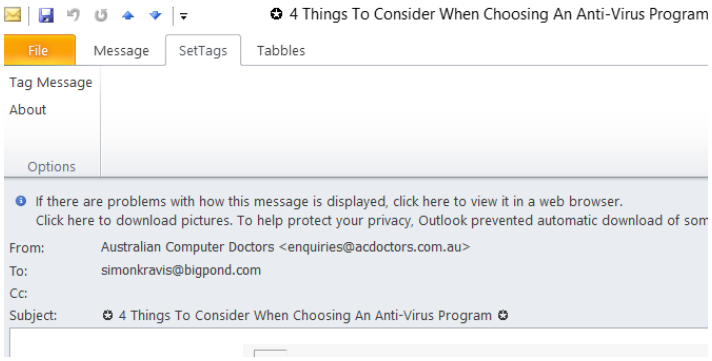
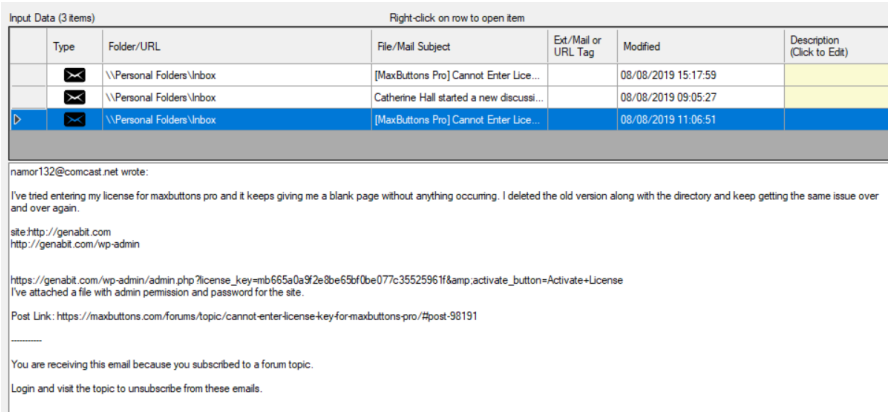
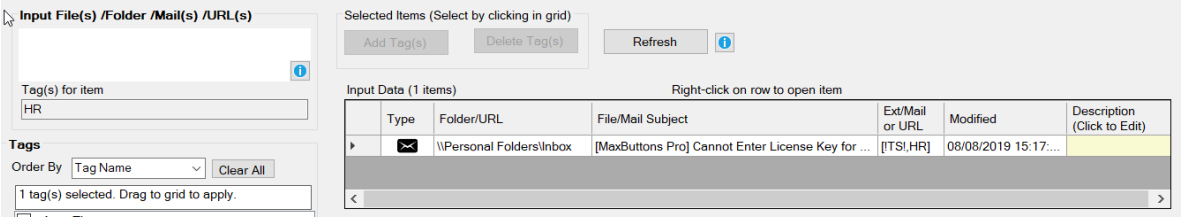


Figure 20 Loading single email messages from Outlook Message window

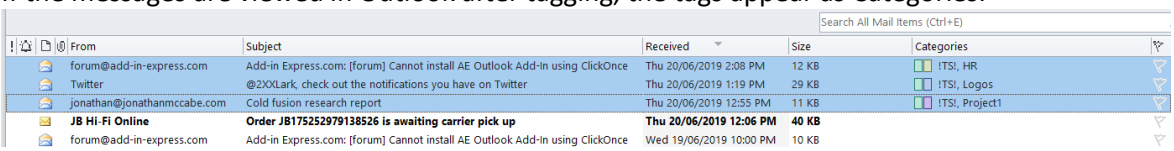
Clicking on any mail message displays its text content as a preview:



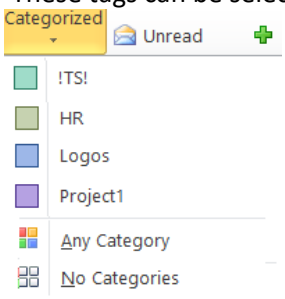
After tagging, the tags appear in the Ext/Mail Tags column:



If the messages are viewed in Outlook after tagging, the tags appear as Categories:

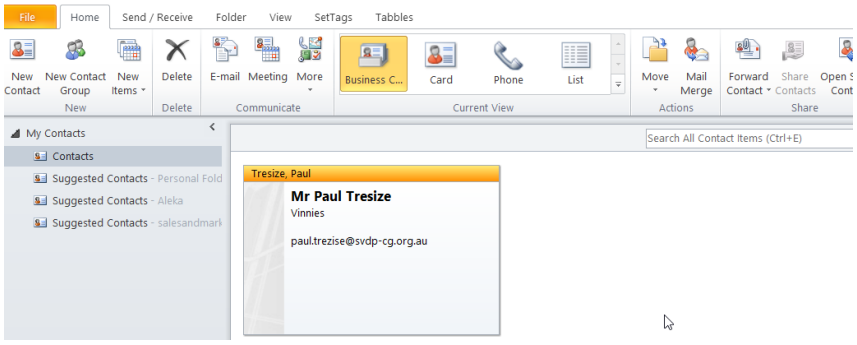


These tags can be selected when searching to display tagged emails within Outlook:

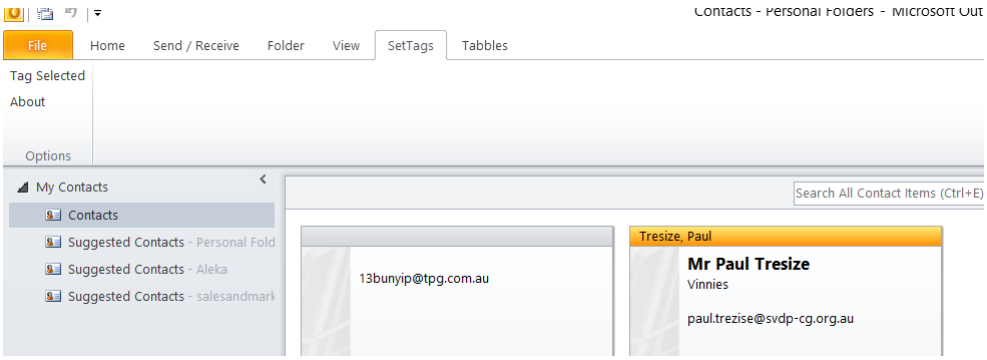


Contacts

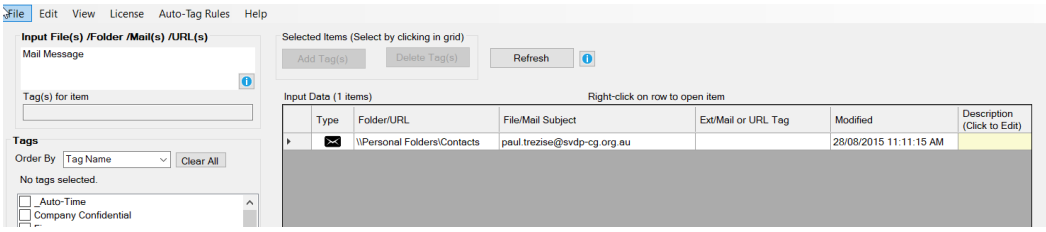
Contacts can be tagged in the same way as Mail messages. After selecting Contacts rather than Mail in the left-hand Outlook pane, contacts are shown in the default Business Card view:



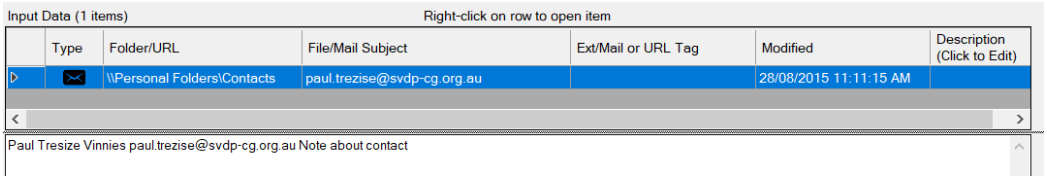
Tags can be added by selecting the SetTags menu item to show the SetTags ribbon. Individual Contacts can be selected for tagging by clicking on them. The top bar turns orange when a Contact is selected as shown below.



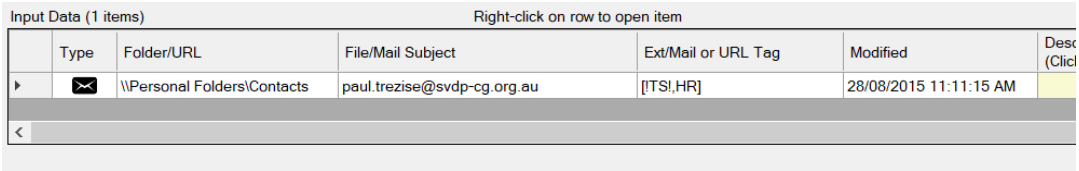
Clicking Tag Selected then launches SetTags with the selected Contact (or Contacts) as input items as shown below. The Contact email address is shown in the 3rd column.



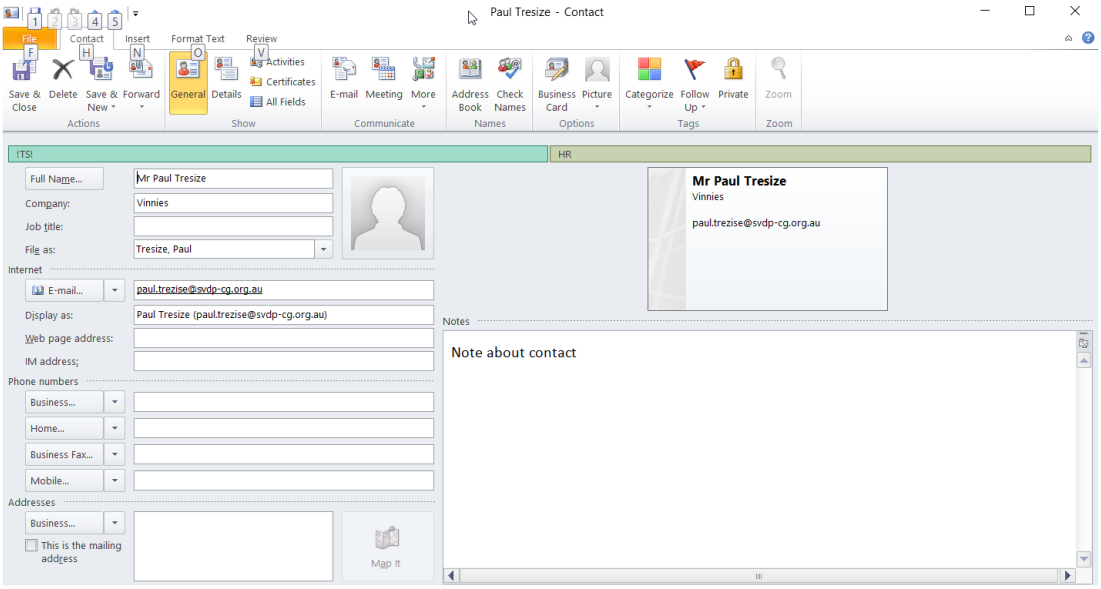
Clicking on the items shows some of the contact information in the preview area



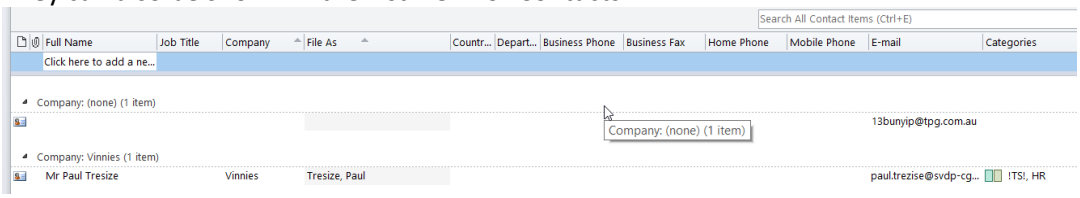
The Contact can then be tagged in the same way as for Mail messages. The tag applied is shown in the 4th column:



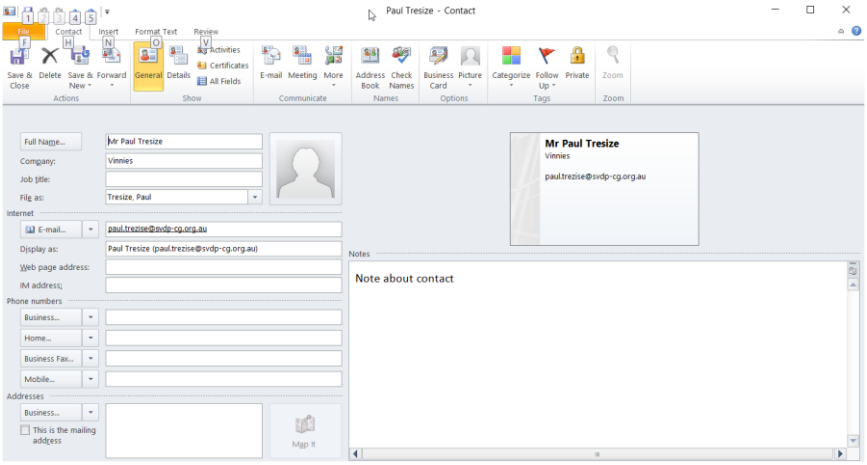
Within Outlook, the applied tags are shown as Categories. These are visible in contacts in the Contact input data screen, shown as below by clicking on the Business Card Icon:



They can also be shown in the List view for Contacts:



Clicking on the Business Card icon opens the Contact editing screen:



Adding Descriptions to Items

Text descriptions can be added to items to provide more information about them. Descriptions are edited by clicking in the yellow Description column to show the following screen:

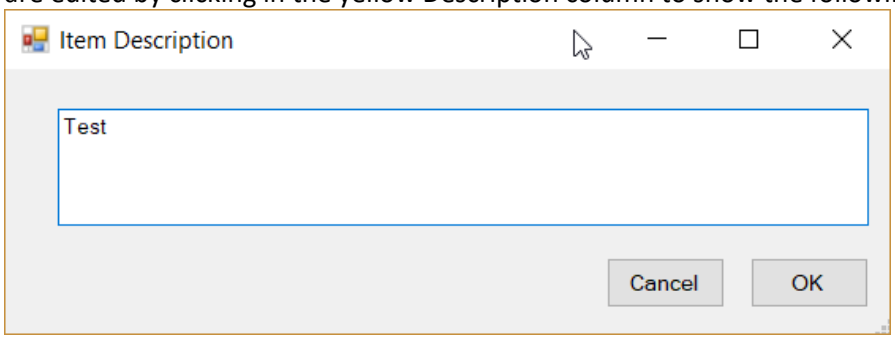
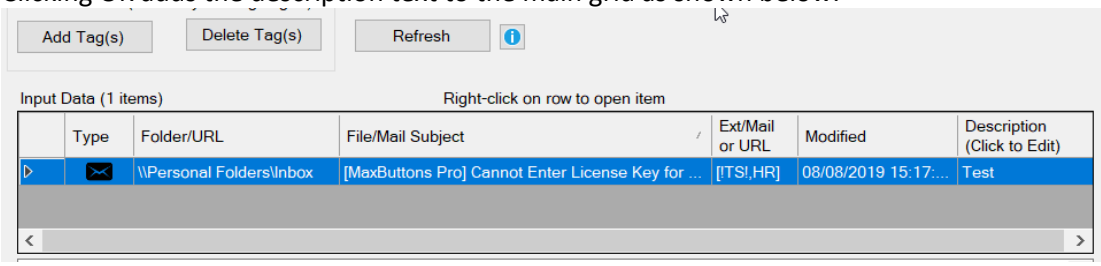


Figure 21 Description Addition screen

Clicking OK adds the description text to the main grid as shown below:



Descriptions are particuarly useful for the URLs where content may bear little relationship to the URL text.

Processing of Items

Processing may be the addition or deletion of selected tags, the deletion of all tags or the population of a facet folder (see page 45). The Desktop license only supports tagging of files and creation of a facet folder on local drives. Removable USB drives and USB drives are also accessible with a Desktop license, but network locations (shared drives) require a Workgroup license.

The File->Tag File(s) menu allows selection of one or more files from a selected folder:

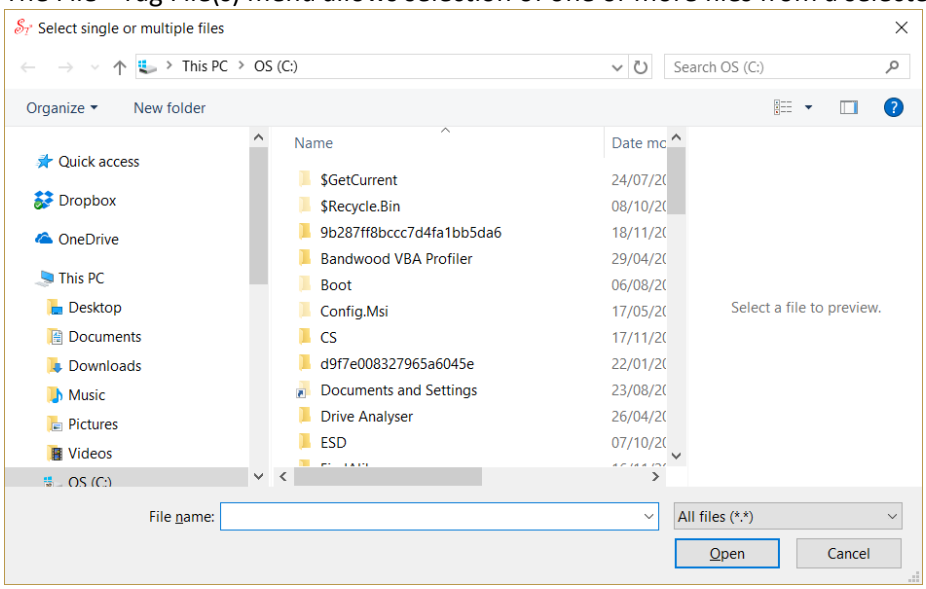


Figure 22 Default file selection screen

The default folder selection is the C: directory. Once files are selected, the default on re-opening is the folder containing the selected file (or files). If a single file is selected and Open clicked, the file path is shown on the main screen:

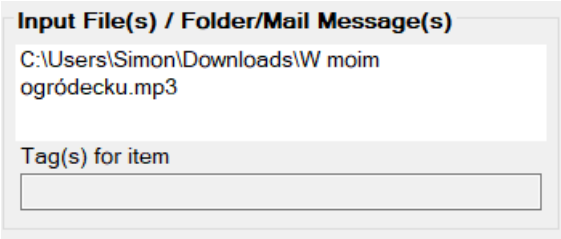


Figure 23 Main screen after single file selection

If a file to which tags have already been applied is selected, these tags are shown in the 'Tags for file(s)/folder box':

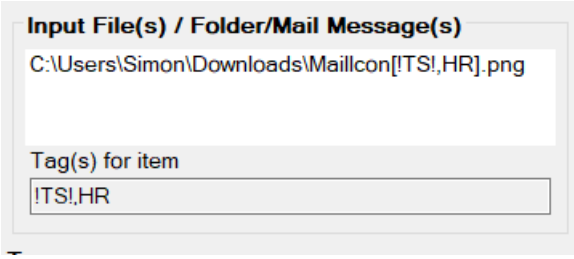


Figure 24 Main screen after selection of already tagged file

If multiple files are selected the main screen indicates this:

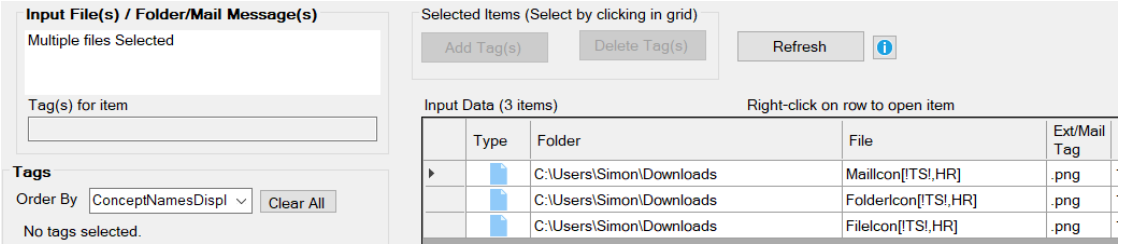


Figure 25 Main screen after multiple file selection

Note that the Stop button appears for multiple file processing. This is enabled after Add Selected or Delete Selected is clicked. Clicking it stops processing Single folders can be selected using the File-> Open Folder.. option. This brings the up the following screen by default:

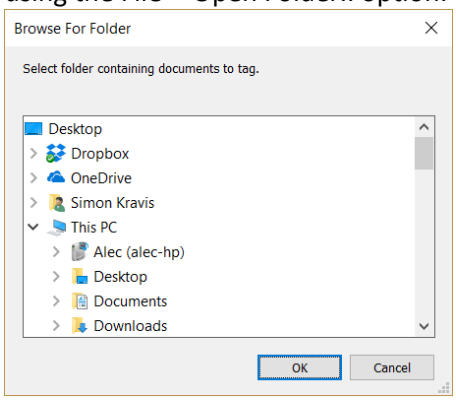


Figure 26 Default folder selection screen

A folder containing files to be processed can then be selected via the Tag File(s) in Folder.. menu item. If such a folder is selected, the main screen shows the folder path as follows:

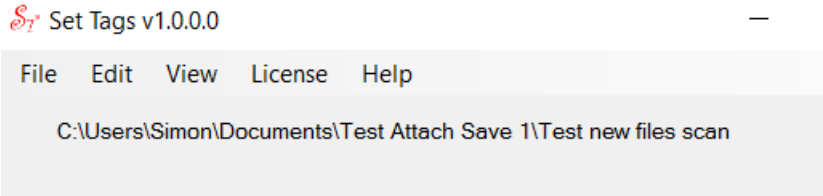


Figure 27 Main screen showing folder path

This path is persisted for subsequent folder selections.

Processing of Mail Messages

When tags are applied to mail messages, the tags are shown in the FileExt/Mail Tags column as shown below:

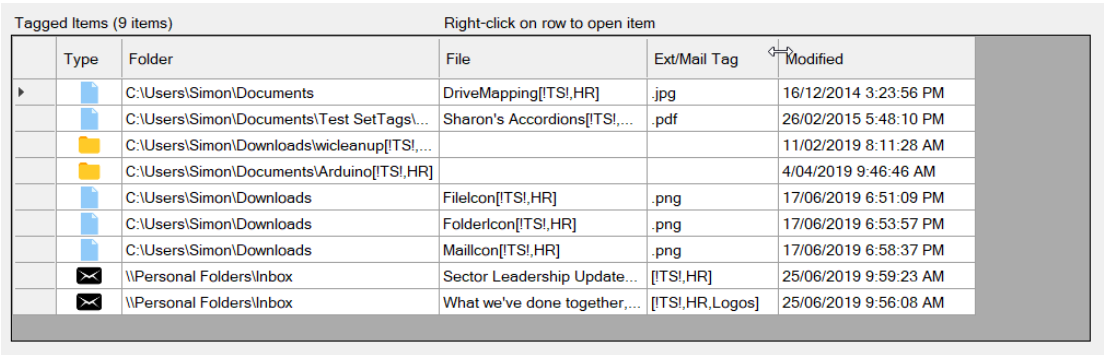
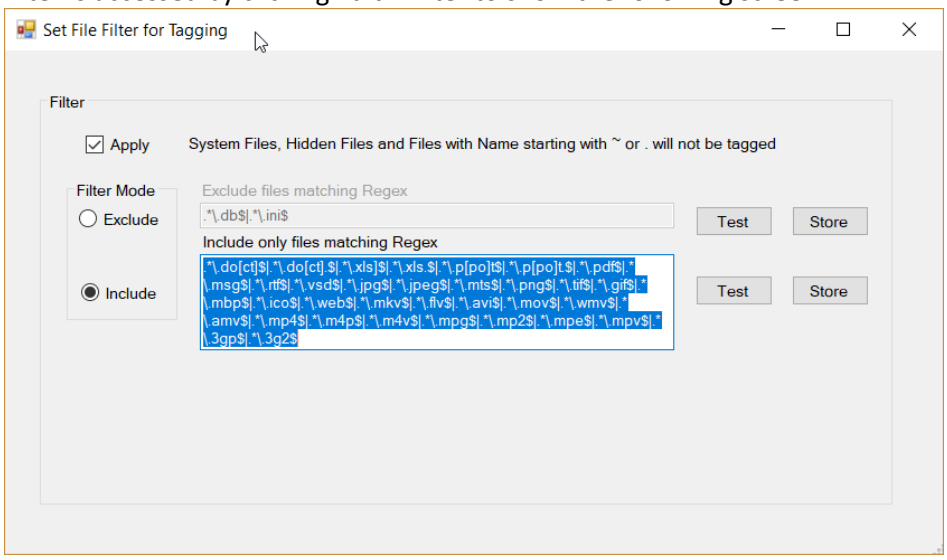


Figure 28 Example of display of tags, for files, folders and mail messages

Tag Filter

If multiple files are selected, for example by selecting a folder, it may be that some files should be excluded from the tagging process. One reason is that file names may be used internally by an application and the addition of the tag to the file name may cause the application to fail. The filter is accessed by clicking Edit->Filter to show the following screen:



Filters are defined as Regex expressions, and Regex documentation should be consulted to determine how to achieve the desired result.

System and hidden files, and Office temporary files starting with ~ or Macintosh files starting with . are always excluded. Other file types which may be accessed on the basis of their file names (such as code files) should also be excluded.

The Apply checkbox determines whether any filtering is applied when files are processed. Files not meeting the filter criteria are not shown in the grid display. Files rejected by the filter are listed as skipped in the run reports. The default setting for Filter Mode is Exclude, where the filter excludes files whose full path match a Regular Expression (Regex). The Include Filter Mode setting includes only files whose full path matches a Regex, depending on the Filter Mode setting. Files with System or Hidden attributes are not tagged if any filter is applied. The default settings for the Exclude filter exclude file names with end in .db or .ini. The default settings for the Include filter include Office files and common image and video formats. If these values are edited, the new Regex can be tested by clicking the Test button beside each string and stored by clicking the Store button.

Excel spreadsheets containing links to other files may have the links broken the if the name of the link target file is changed, as the lin is stored as a relative path. If Excel spreadsheets containing links are to be tagged, then links should be updated after tagging.

Displaying Tagged and Untagged Items

When items are loaded and at least one tag is selected from the list, controls in the View box are enabled as shown below. If no tags are selected only the loaded files are displayed. Clicking on the Show Tagged button shows all the files to which the user has access which have the selected tag or combination of tags. Note that these are not necessarily included in the loaded input files.

If more than one tag is selected, they are combined as AND or OR according to the Tag Conjunction setting. The loaded files can be redisplayed by clicking the Input Data button.

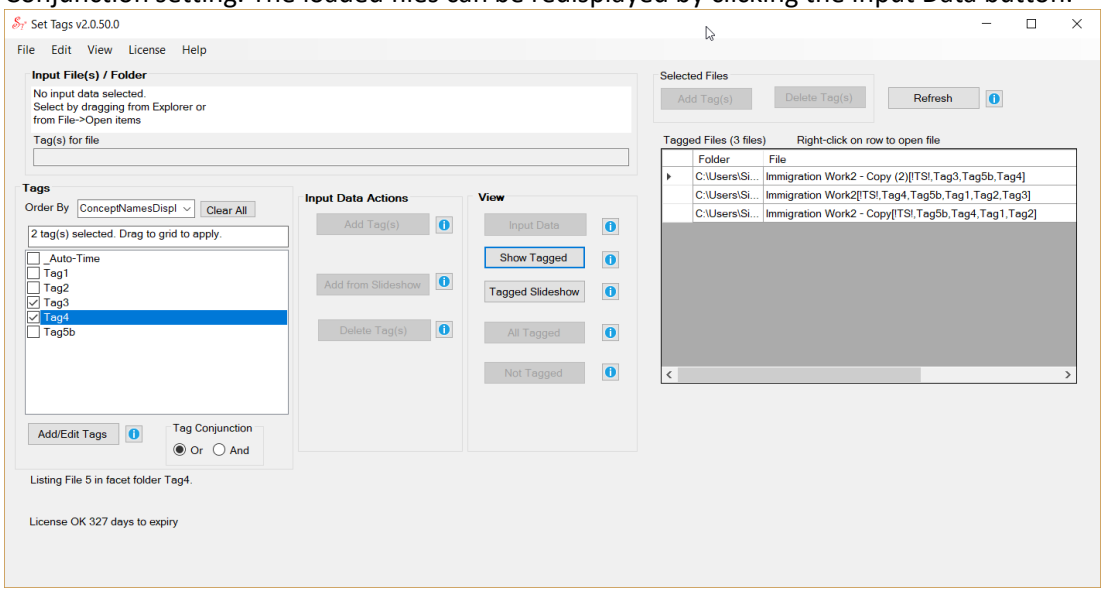


Figure 29 Display of files with selected tags Tag3 and Tag4

Clicking on the All Tagged button shows all files with any tag which are included in the loaded files. Note that the grid heading changes to All Tagged in this case.

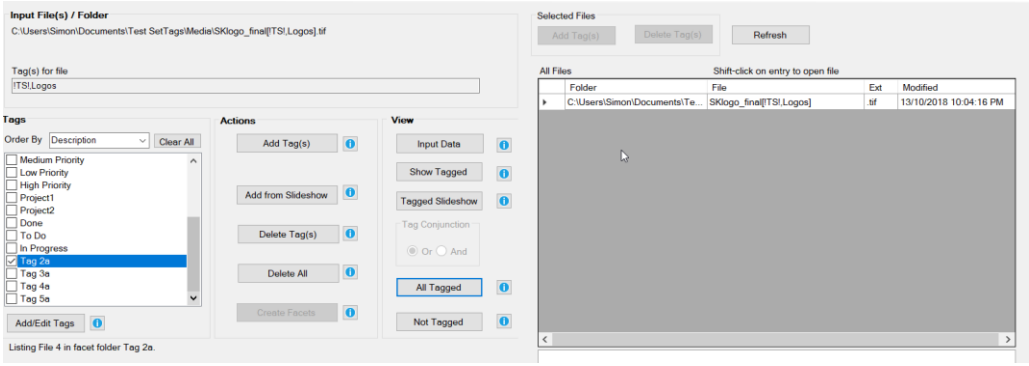
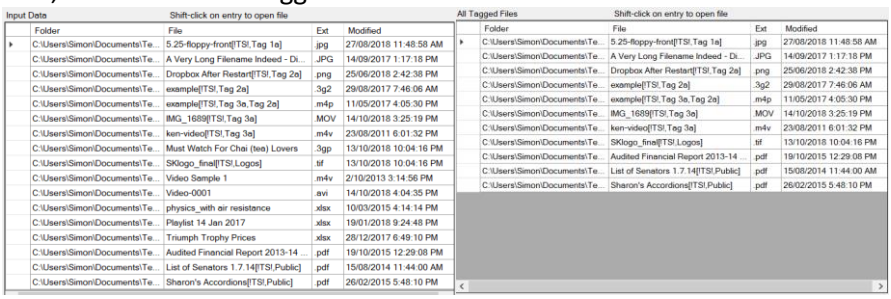


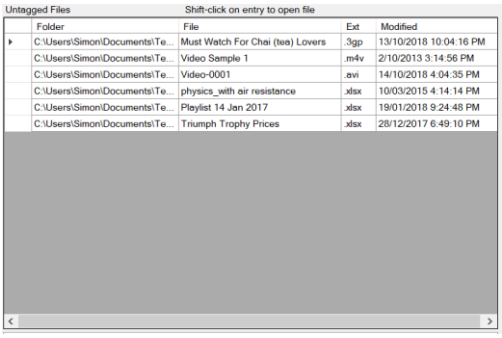
Figure 30 Display of all tagged files included in loaded files

In the above example only a single tagged file is loaded.

All Tagged and Not Tagged Display

If multiple files or folder contents are loaded, the All Tagged and Not Tagged buttons display complements of set of loaded files. The figure below shows results with a folder containing 18 files, 12 of which are tagged.





Untagged Files Shift-click on entry to open file

Folder	File	Ext	Modified
C:\Users\Simon\Documents\Te...	Must Watch For Chai (tea) Lovers	.3gp	13/10/2018 10:04:16 PM
C:\Users\Simon\Documents\Te...	Video Sample 1	.m4v	2/10/2013 3:14:56 PM
C:\Users\Simon\Documents\Te...	Video-0001	.avi	14/10/2018 4:04:35 PM
C:\Users\Simon\Documents\Te...	physics_with air resistance	.xlsx	10/03/2015 4:14:14 PM
C:\Users\Simon\Documents\Te...	Playlist 14 Jan 2017	.xlsx	19/01/2018 9:24:48 PM
C:\Users\Simon\Documents\Te...	Triumph Trophy Prices	.xlsx	28/12/2017 6:49:10 PM

Figure 31 Display of all loaded files(Top L), all tagged files (Top R), untagged files (Bottom L)

All of the view options can be accessed by right-clicking in the tag list box to bring up the context menu shown below. This option can be used if the View Box and Input Data box are hidden.

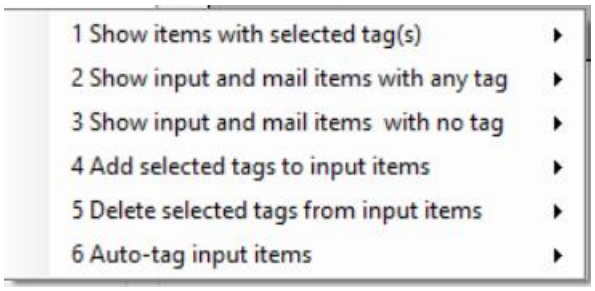


Figure 32 Context menu for display and processing options

Viewing Items Shown in Grid

Clicking on any row in the grid displays a preview of the item below the grid, and right-clicking or double-clicking opens the file with the selected Windows application for that file type in a new window as shown below. Folders are opened with File/Windows Explorer and mail items with Outlook.

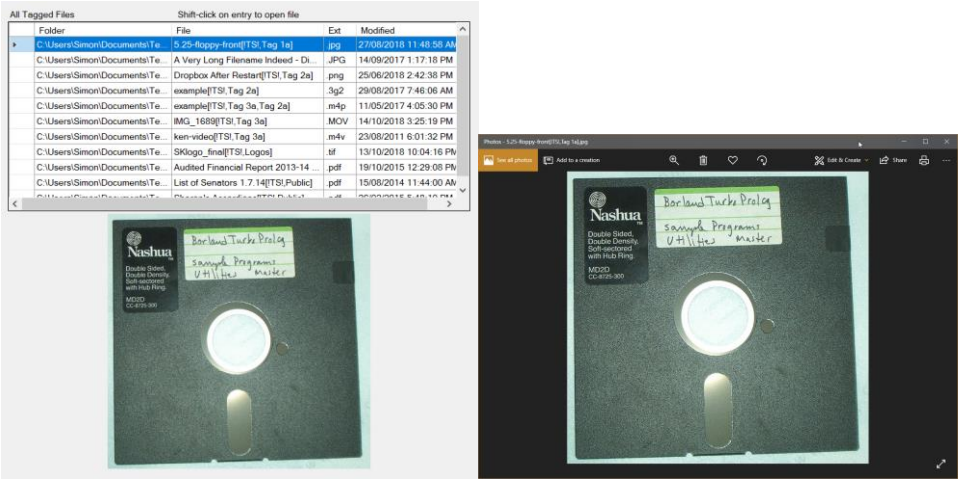


Figure 33 Displaying Files from the grid as a preview by a click (left) or using the associated application by a shift-click (right)

Some file types (such as Outlook msg files) cannot be displayed in preview, but can be opened by Ctrl-clicking.

The first 8000 characters of Web page text content is displayed as a preview for URL items. This content may not be available for some URLS due to security issues. A warning message is displayed in this case. Text content may also be missing if the web page does not support particular browser versions. The absence of text content does not prevent the URL from being tagged.

The up and down arrows on the keypad move the row displayed up or down.

Adding to or Removing Tags from Selection of Items Shown in Grid

Multiple Items Selection

When one or more tags is selected, and items are shown in the grid, selected tags can be added or removed from any items selected via the Add Tag(s) and Delete Tag(s) buttons, which are then enabled. Multiple items can be selected by clicking on a row and then shift-clicking on a different row. All rows in between will then be selected. Rows can be added individually to the selection by ctrl-clicking on the new row.

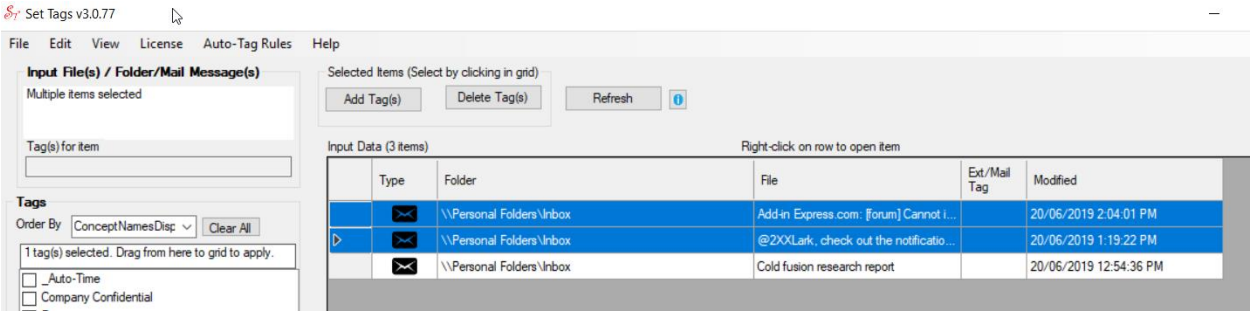
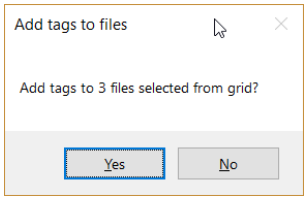


Figure 34 Multiple Row Selection from Grid

Clicking Add Tag(s) in the Selected Files box above the grid requests confirmation:



If the addition is confirmed, tags are added to the selected items. If tags already exist in any of the selected files, the option to replace or append can be chosen. The display view then changes to Tagged Files:

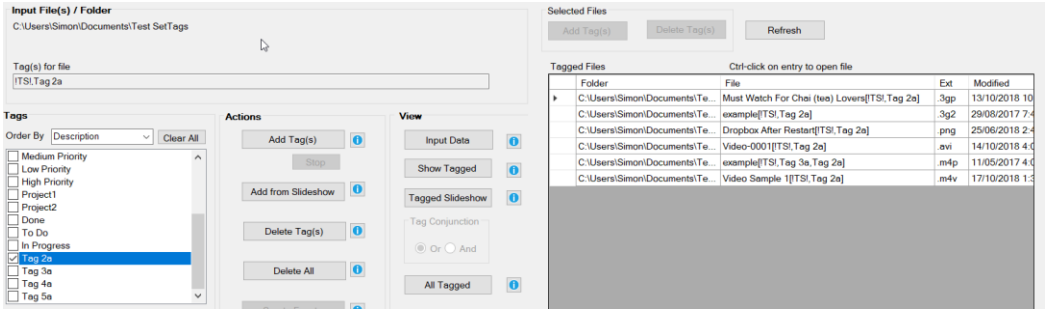


Figure 35 Display after Addition of Tags from Untagged Files Screen

To delete tags from items, select the items from which the tags are to be deleted, and the tag(s) to delete as shown below:

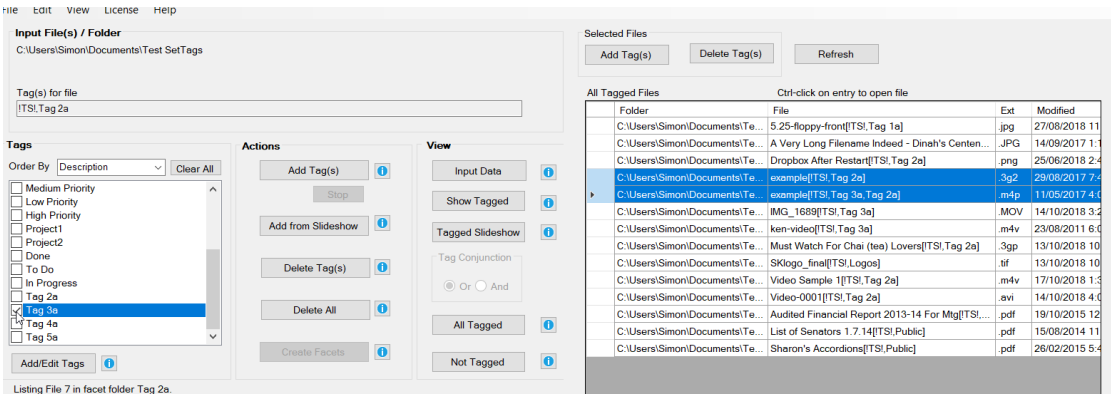
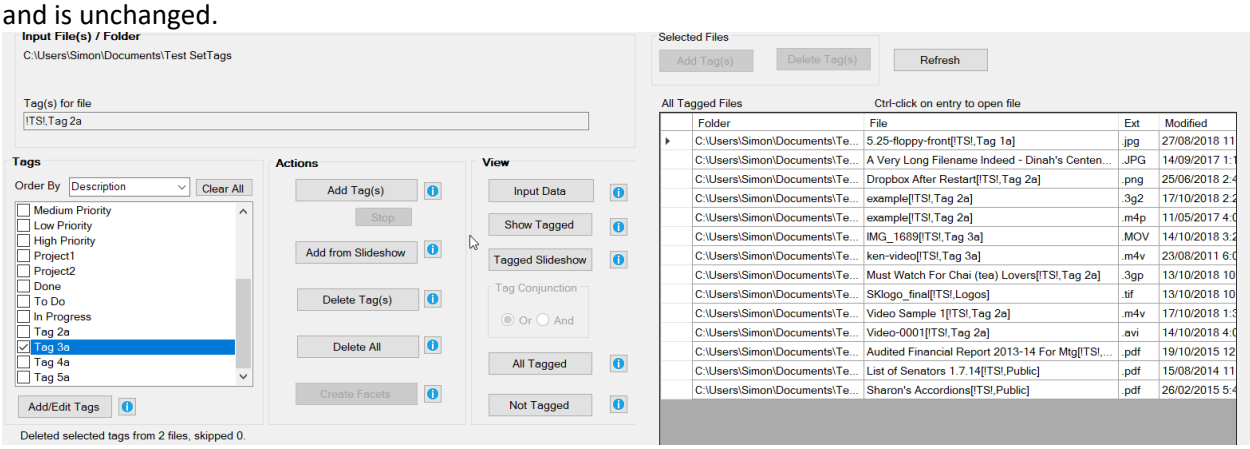


Figure 36 Files Before Deletion of Tag 3a from two selected file

The expected result is that the tag "Tag 3a" is removed from the file called example.m4p before any tag was applied, as shown below. The other selected file did not contain the selected tag and is unchanged.



Adding Tags To a Single File Selection using Preview

Where tags are to be applied to files on the basis of the file preview, this can be achieved by clicking the file row in the grid to show the preview, and then dragging from the tag selection box above the tag list onto the file shown in the grid as shown below. This has the same effect as selecting the file to be tagged and clicking Add Tag(s) in the Selected Files box above the grid. It may be helpful to hide the Input Data Actions and View boxes from the View menu in this case:

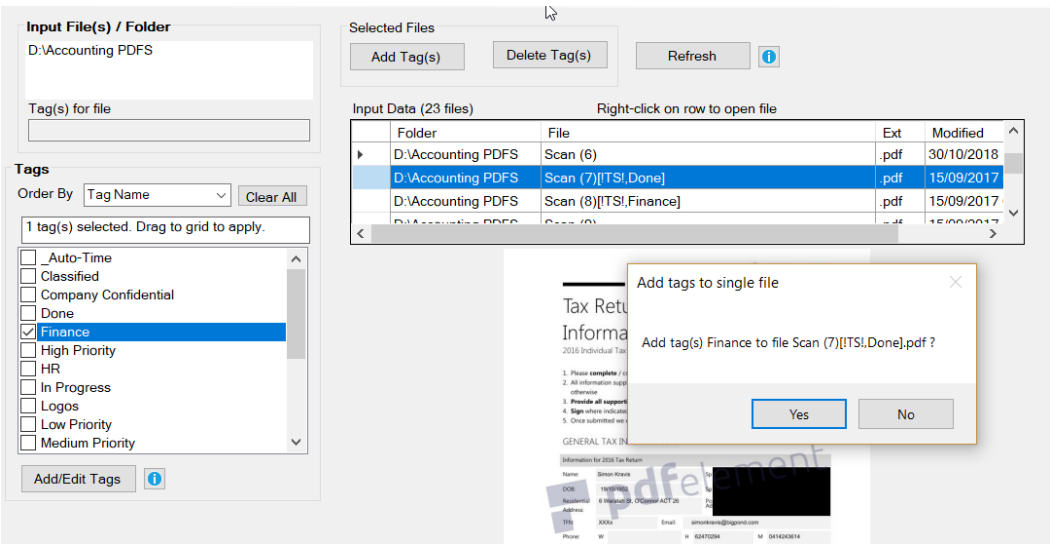


Figure 37 Adding Tags by Dragging to a Single File on the Basis of Preview

Adding Tags to Single File Selection from Slideshow

Slideshow mode also adds tag to a single file. The preview is shown over the full screen for Office, text and media files. After loading single or multiple files, the Add from Slideshow button in the Actions box is enabled. Clicking this button displays all loaded file as shown in the screen below. A similar screen is shown for any files displayed in the grid by clicking the Tagged Slideshow button in the View Grid. The screen can be used to add or remove tags as well as display files sequentially.

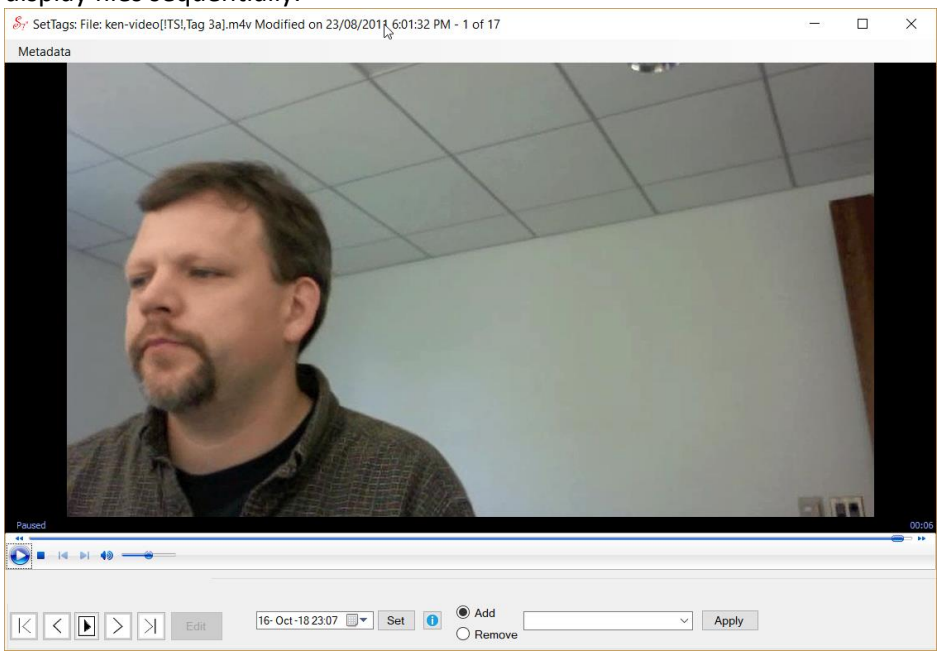


Figure 38 Slideshow screen showing video

Images can also be shown visually, as well as the first page of Office and PDF documents. The Edit button allows images to be edited using the Windows default application. Videos must be stopped using the blue controls directly below the video before the a different slide can be viewed using the navigation buttons at the bottom left.

Tags can added (and removed) individually via the combo box. New tags can also be defined. Only existing tags can be removed.

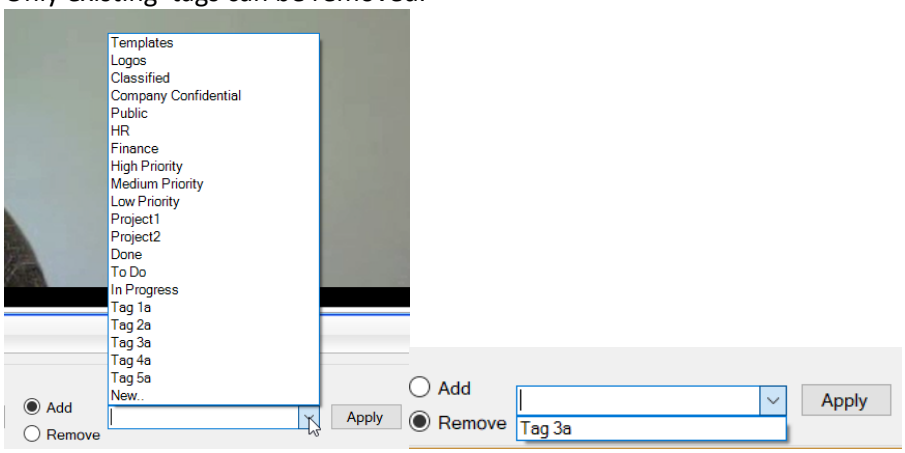


Figure 39 Applying tags(Left) and removing tags(right) from within slideshow

For files type other than media, a file preview is shown:

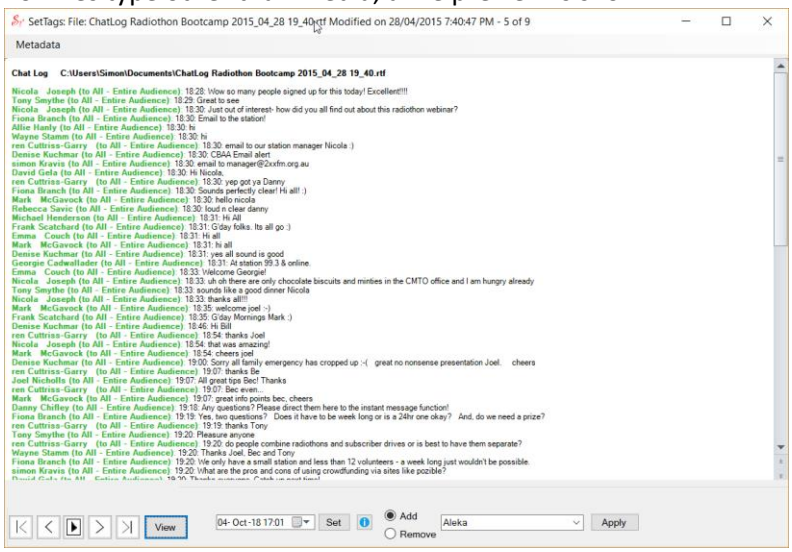


Figure 40 Slideshow view of non-media file

This view displays the content of file types supported by the Preview control (including Office files). Even if the file type is does not have its content shown, it can be viewed via the View button, which launches a read-only copy of the selected file with the default application.

File metadata may be viewed by clicking the Metadata menu item at the top LHS of the screen:

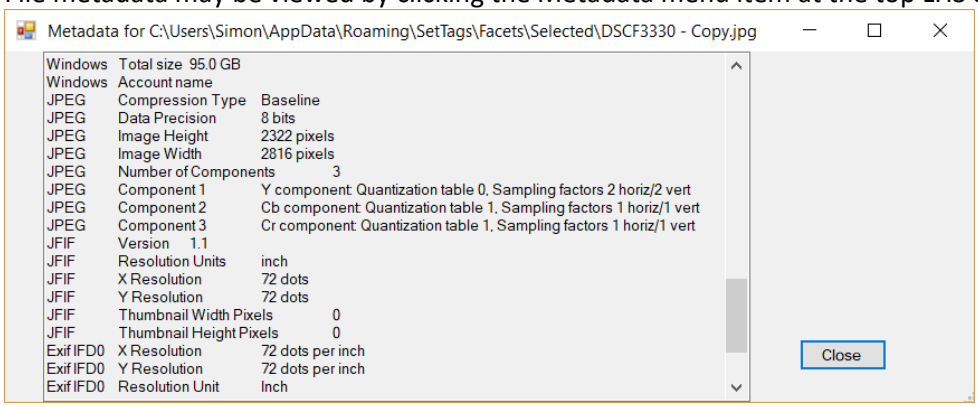


Figure 41 File Metadata

The general group of metadata fields is shown first, then the metadata field name and finally the value.

The list of selected files may be traversed using the left ( ) and right ( ) arrow buttons in the lower left corner of the screen. If the cursor is left on either of these buttons the list may be traversed using the left and right arrow keys on the keyboard. The button moves back to the first item in the list and to the end. Clicking the slideshow button moves automatically through the list, displaying each slide for the time interval selected by selecting the slideshow interval on the Options screen. The default value is 5000 msec. After clicking, the slideshow button shows the pause symbol . Clicking the button showing this symbol stops the slideshow, as does clicking the ESC key while the cursor is over the slideshow button. During the slideshow, all controls except the slideshow button are disabled.

Images may be zoomed to a maximum of 3x by dragging the grey square in the scroll bar at the bottom of the screen, or by clicking the Up arrow button to zoom in or the Down arrow button to zoom out:

Figure 42 Zoomed image display

Adding Selected Tags To All Input Data

To add selected tags to all loaded items, check the tags required for the item from the list shown in the Tags section of the main screen. When any tag is selected, the Add Selected and Delete Selected button are enabled. Clicking Add Selected shows a confirmation screen indicating the operation mode as shown below:

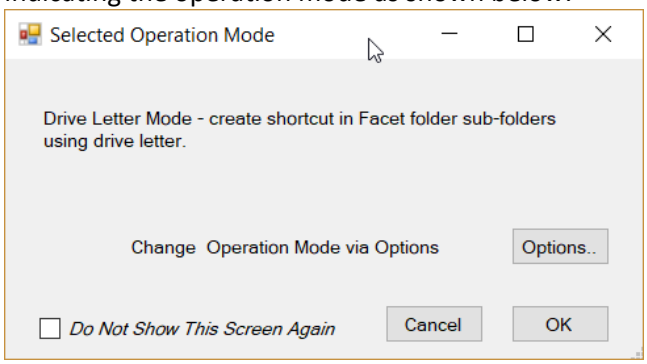


Figure 43 Operation Mode Confirmation Screen

The operation mode may be changed by clicking the Options button to show the screen in Figure 52. Checking Do Not Show This Screen Again will prevent the confirmation screen from being shown.

Single Input Files

If a single file is the selected item, the name of the item changes after tagging to include the tag string as shown below, and the tag string itself is shown in the tag text box. The tag !TS! is used as a marker to identify files tagged by SetTags. Multiple tags are separated by commas.

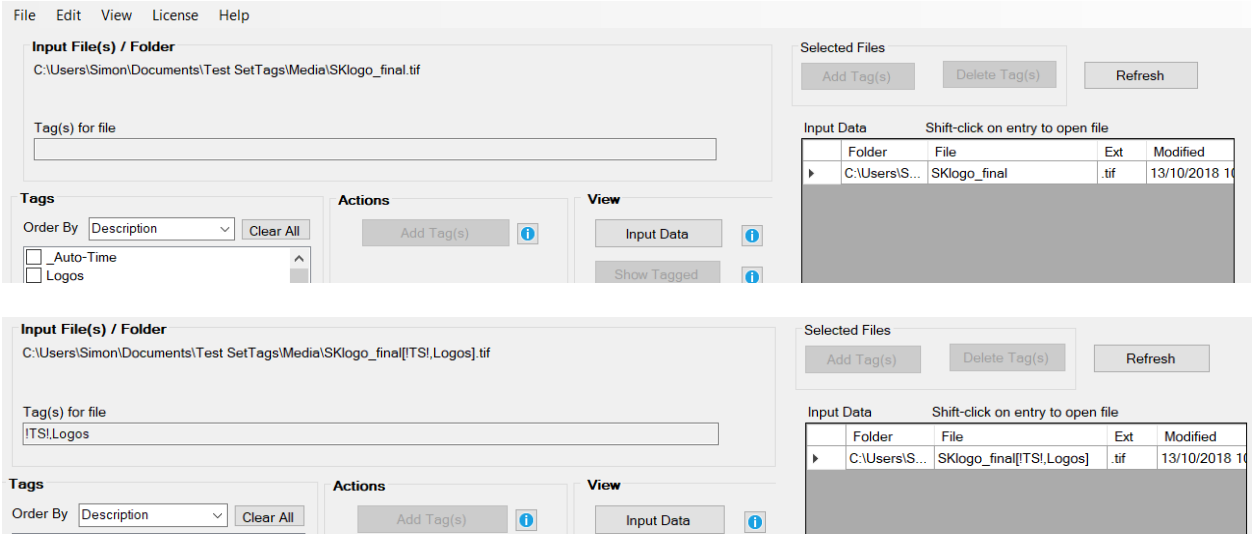


Figure 44 Single file before adding Logos (top) and after addition (bottom)

If the file to be tagged already has a tag created by SetTags, the option to append the selected tag to the existing one or replace it is offered as shown below:

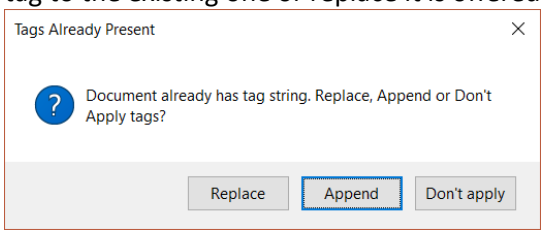


Figure 45 Option screen to select replacement of or appending and existing tag

The selected tag is only appended if it is not present in the existing tag.

Replacing Files Already Tagged

If a tagged file is replaced rather than edited (as can happen when organisation logos or templates are changed), the new file should be placed in the same folder as the one it is replacing (which has tags included in its name) without any tags being added. The required tag should then be added by SetTags, and the new file with the selected tag in its file name will replace the old one.

If the tags are added manually and the new file replaces the old one, any shortcuts pointing to it will not find the new file, as its identity as seen by the shortcut uses a unique file identifier, not the file path. In this case the shortcut will be removed by purging (see page 46).

Same File Name in Different Folders

Files with same name are commonly found in different folders. When these are tagged in Copy or Move mode, the facet folder sub-folder with the tag name will contain files with bracketed sequence numbers added to the file names before the file extension to distinguish them. In any of the other modes, a sequence number will be added to shortcut name for the second or subsequent files.

Folder Contents

If the selection is a folder, the following screen asking if the tagging is to be applied recursively to files in all sub-folders is shown:

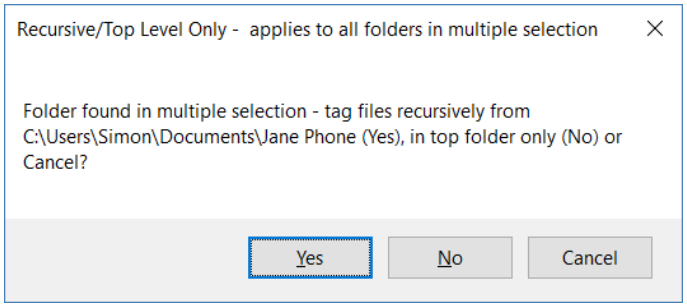


Figure 46 Application of tags to files recursively or to files in folder only

Application of the tags can be stopped by clicking the Stop button below Add Selected, which is enabled when the tagging starts. The progress of tagging is shown below the tag grid, and the file name at the top is the file name after tag addition. Note that changes to file name by an application may not result in the change being visible in Windows Explorer unless the display is refreshed by clicking F5.

Options Available from Tags Box

The main functionality provided in the Input Data Actions and View boxes can be accessed by right-clicking in the Tags list to show the following context menu

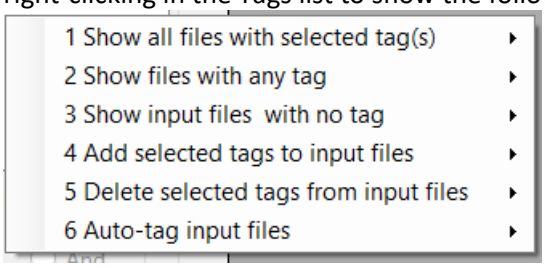
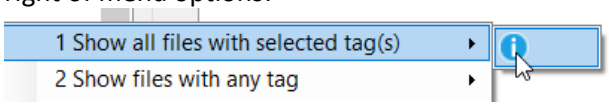


Figure 47 Tags box context menu

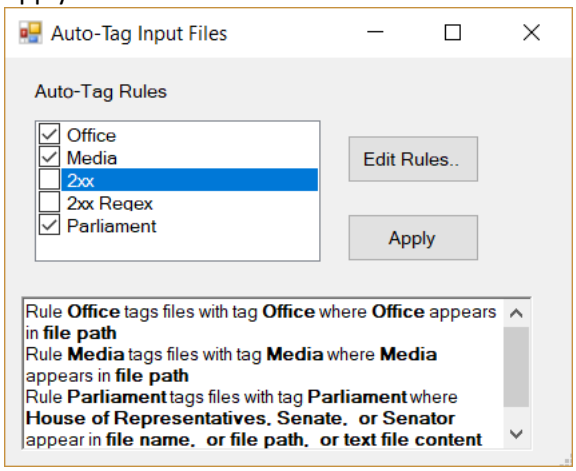
If multiple tags are selected, the display may use a criteria of OR and AND for display depending on the setting of the Tag Conjunction box below the tag list.

Selecting Option 2 shows either all tagged files with the selected tags, or only those files appearing in the input data. Further help is available from the Info menu items shown to the right of menu options:

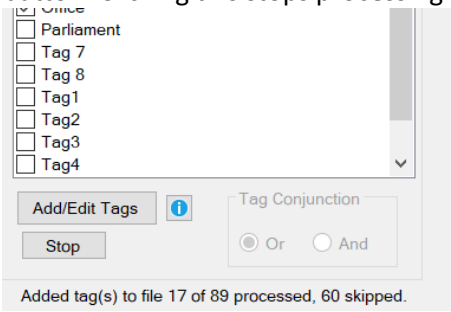


Auto-Tagging

If option 6 (Auto-Tagging) is selected, the screen below allows users to select which rules to apply to the text content of the item and edit them if necessary:



Clicking Apply applies the selected rules (rules with a check mark beside them) to the files shown in the grid. While the tagging is running, a Stop button appears below the Add/Edit Tags button. Clicking this stops processing.



Note that folder items have no text content and URL text content may be missing or unexpected for reasons discussed earlier.

Delete Operations

Tags are only removed from files by this operation. They are not removed from the tag list by this deletion. If tags are to be removed from the available list, click the Add/Edit Tags button. After Delete operations, SetTags is set to have no input data loaded. Note that changes to file name by an application such as SetTags from deleting tags may not result in the change being visible in Windows Explorer unless the display is refreshed by clicking F5. The Delete process for multiple files may be stopped by clicking the Stop button above Delete Selected.

Delete Selected

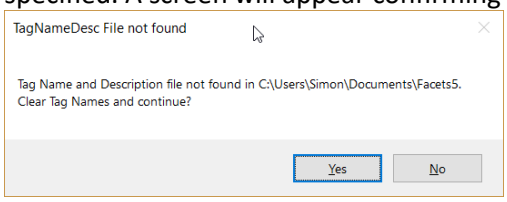
The Delete Selected button removes selected tags from input file(s) , from files within or below loaded folders or from all files to which the selected tag(s) have been applied. This button is only enabled if at least one tag is checked from the list shown in the grid.

Delete All Tags

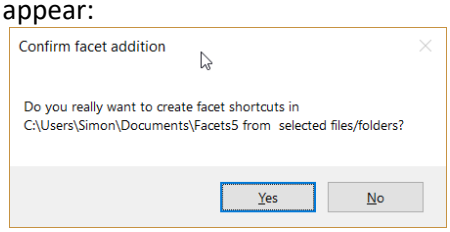
The menu item Edit->Delete All Tags removes all tags from file(s) directly loaded, from files within or below loaded folders or from all files to which any tag has been applied. Note that no items need to be loaded for this operation to be enabled. Delete operations for All files may affect files not included in the input data.

Creating the Facet Folder

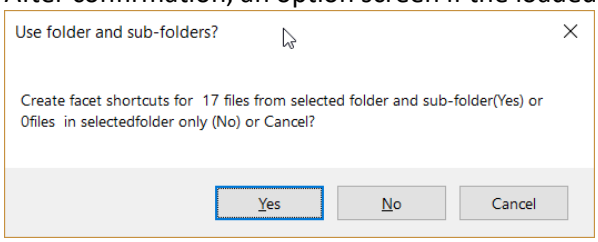
A facet folder and a set of sub-folders can be created from a set of loaded files containing tags via the menu item Edit->Create facets. This may be necessary if a collection of tagged files is moved to a different server and the existing shortcuts in the facet folder will not find their targets with the selected operation mode. In this case, a new, empty, facet folder should be specified. A screen will appear confirming that existing tags will be deleted from the database:



After closing the Facet Folder screen and selcting Edit->Create Facets, a confirmation screen will appear:



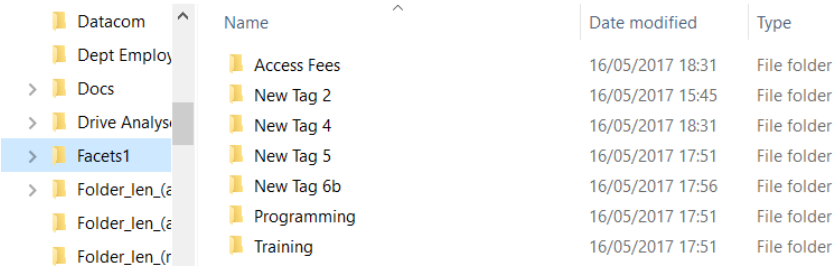
After confirmation, an option screen if the loaded files are folder contentswill appear:



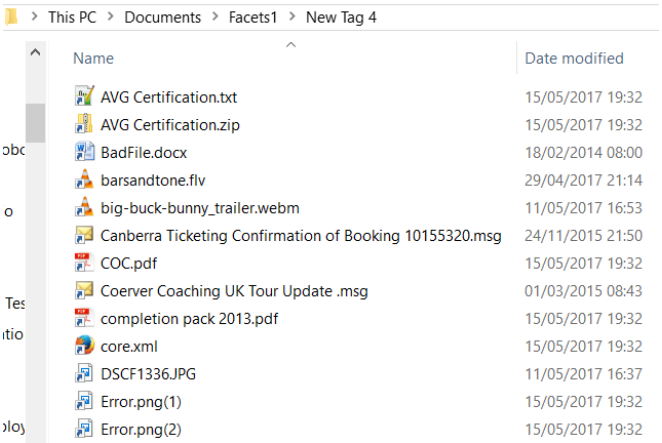
Selecting Yes will create sub-folders corresponding to tag names and populate them with shortcuts pointing to the files. Selected files without tags will not be processed. If tags do not exist in the current database to match those present in the files they will be created.

Facet Folders

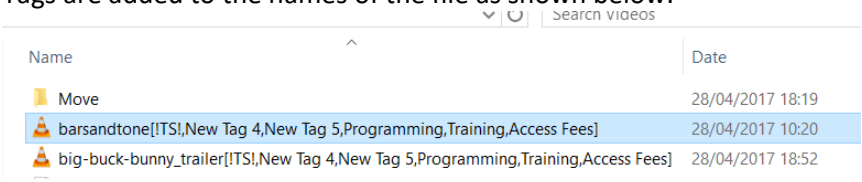
The Facet folder is created automatically on startup at C:\Users\<UserName>\AppData\Roamind\SetTags\Facets for desktop licenses if it does not already exist. It is the parent folder for a number of sub-folders which have the names of tags. The content of the sub-folders is determined by the Operation mode tab of the Options screen described on page 49. Changes to tags are reflected in changes in the tag string in the file name, and by changes to the content of each sub-folder. If the Operation Mode uses Mapped Drive, Server Name or Relative Path shortcuts, the sub-folders contain shortcuts to files having that tag, thus allowing files with particular tags to be located by browsing rather than search. An example of a facet folder (Facets1) is shown below. This folder contains sub-folders, each with the name of a tag



The sub-folders provide a way of finding tagged documents by browsing with Windows Explorer rather than using search. The content of sub-folder New Tag 4 is shown below:



Each tag sub-folder contains a shortcut to the file with that tag, using the name of the file (with extension) for the shortcut. Where two different files have the same name and the same tag, a sequence number is added just before the file extension (eg Error.png(1), Error.png(2)). The Modified dates of the shortcuts are set to the Modified dates of the target files
Tags are added to the names of the file as shown below:



In Mapped Drive or Server Name shortcut mode, shortcuts will find their target if it has been moved or renamed within the file share or storage device, the structure is robust against renames or relocations of the tagged files

Setting Location

The Facet folder location can be changed by clicking on the Edit->Facet Folder menu item to show the following screen. A new folder location can be selected using the Browse.. button.

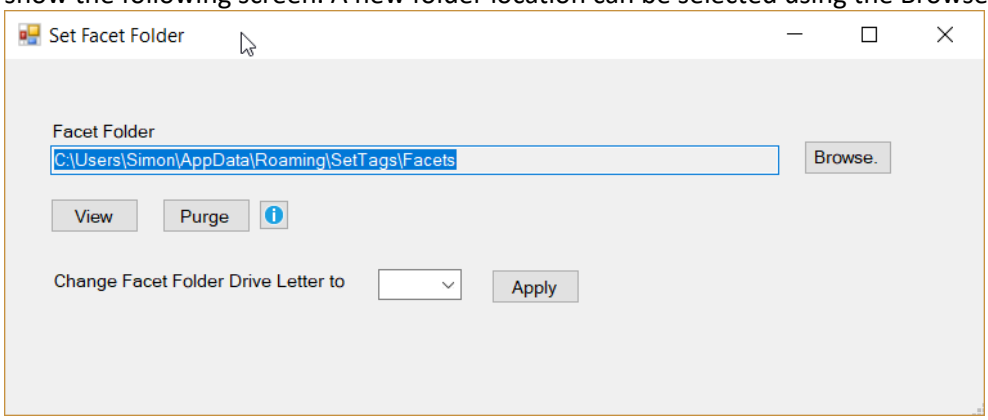


Figure 48 Facet Folder definition screen

The View button launches Windows Explorer in the facet folder to show the sub-folders with the names of tags:

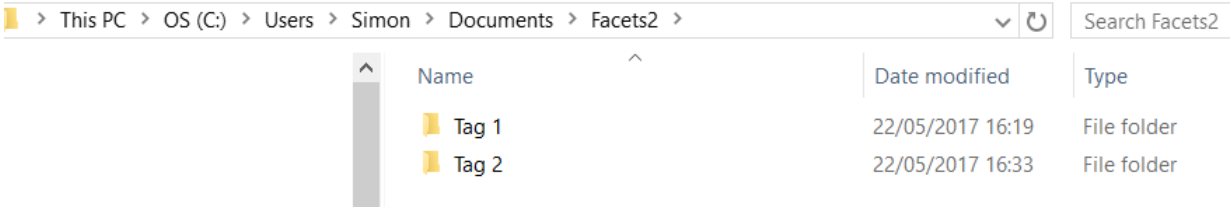


Figure 49 Viewing Facet Folder with Tag sub-folders

Purging the Facet Folder

In Mapped Drive Letter, or Server Name mode, it is possible that the shortcuts contained in the facet folder point to files which have been deleted or moved to another server, in which case the shortcut will not open the desired file and will display the screen below:

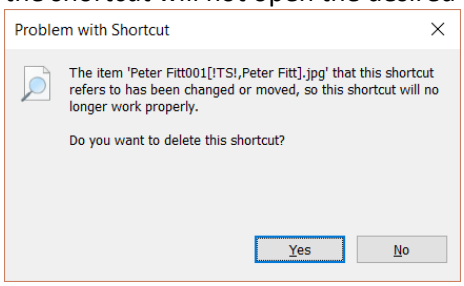


Figure 50 Message shown when shortcut target deleted or moved to another server

Clicking the Purge button tests whether the targets of all shortcuts created in Mapped Drive Letter or Server Name modes below the facet folder point to targets which are still on the same server as when the shortcut was created. If not, the screen shown in Figure 50 is displayed, and the Yes option to delete the shortcut should be selected. In addition, purging removes pointers to emails which have not had tags applied or which are no longer accessible.

Purge also offers the option to delete any tags from the list which have not been applied to any files.

Changing Shortcut Target Drive Letters

If a set of facet shortcuts is generated on a removable drive, the mapped drive letter may change if the drive is connected to a different computer or if different peripherals are

connected to the same computer. The change in drive letter will result in shortcuts failing to find their targets when clicked. The shortcut targets can be changed in to use the new drive letter by selecting the new drive letter from the dropdown box, which shows all current drive letters for the computer, selecting one and clicking Apply:

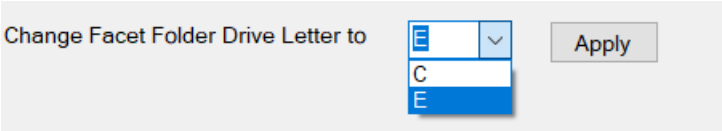


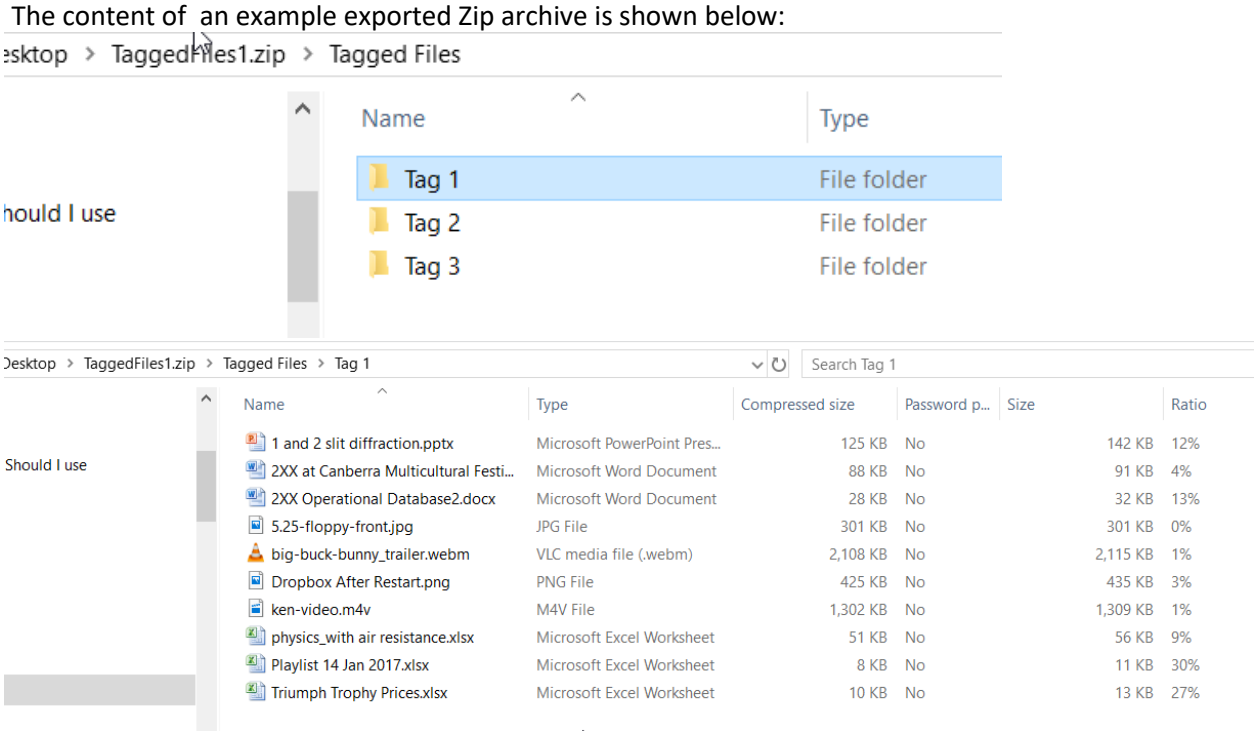
Figure 51 Changing facet folder drive letter

Using the Mapped Drive letter rather than Relative Path allows the thumbnail of the shortcut target file to be shown in the shortcut itself, allowing easy inspection of image files with a particular tag.

Exporting Tagged Files

Files which have been tagged can be exported as a Zip file. Tagged folders and emails are not included. All files are contained within sub-folders of a Tagged Files folder. Each sub-folder has the name of a tag and each contains files with that tag. Tag names are not included in the file name. The export facility is accessed via the File->Export menu item. The exported file can be forwarded to users who do not have Set Tags installed but wish to access the files grouped by tag.

The content of an example exported Zip archive is shown below:



Options Screen

Operation Mode

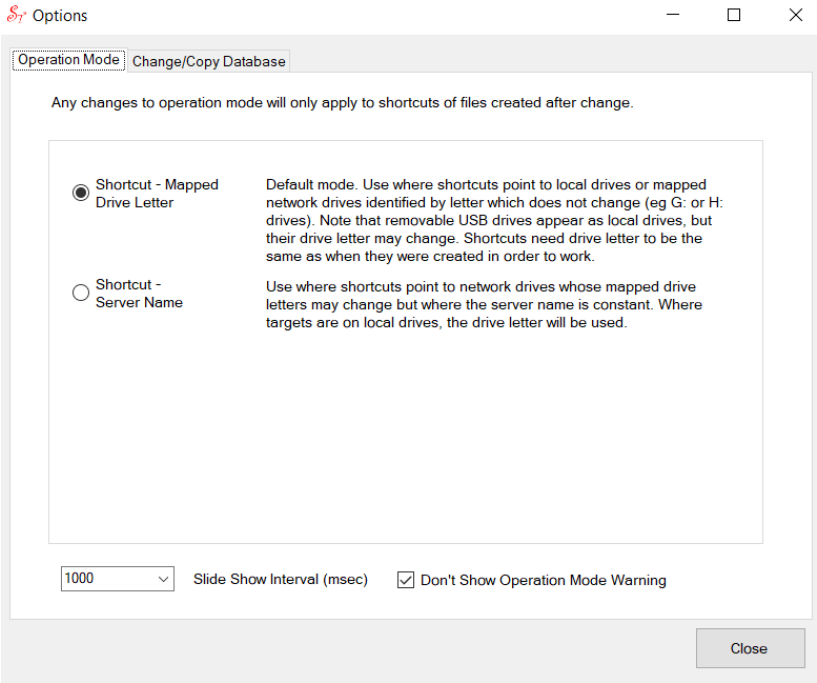


Figure 52 Operation Mode tab

This tab is used to define how the shortcuts access the target files, or allow the user to copy or move files into the facet folders. In all Shortcut modes the facet folder subfolders contain shortcut files, whose icons contain an arrow in their bottom left corner as shown below:

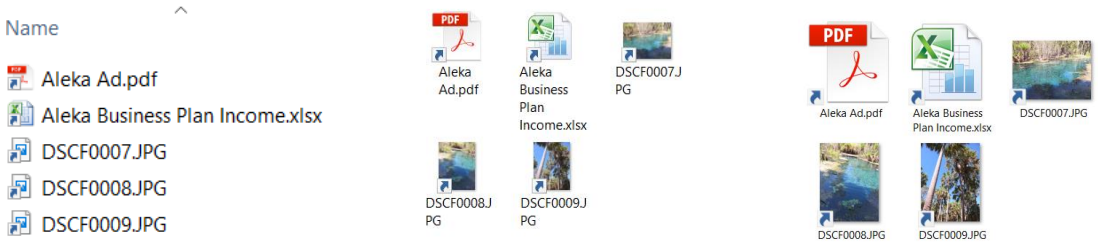


Figure 53 Shortcuts in Facet Folder Subfolder in Details view (left), Medium Icons(Centre) and Large Icons(Right)

Note that attaching shortcuts to emails will not allow the email recipient to view the files.
The operation modes are as follows:

Shortcut using Mapped Drive Letter

This is the default mode where the Facet Folder and tagged files both reside on the local drive of the computer on which SetTags is installed, or on the same shared drive (often called the G: drive within organisations). If the location or name of the tagged file or shortcut changes but the file or shortcut remains on the same drive, the shortcut will still work. Where mapped drive letter shortcuts are created on a removable drive which does not have a constant drive letter across computers, the drive letter can be changed using the Change Mapped Drive Letter option on the Facet Folders screen shown on page 47.

Shortcut using Server Name

This option is used where files have been tagged on different mapped drives and the drive letter used for mapping may change. The UNC path of the target file can be used as the target. This includes the name of the server and has the form:

\\servername\sharename\folder\subfolder\file

If the location or name of the tagged file or shortcut changes but the file or shortcut remains on the same drive, the shortcut will still work.

Change/Copy Database

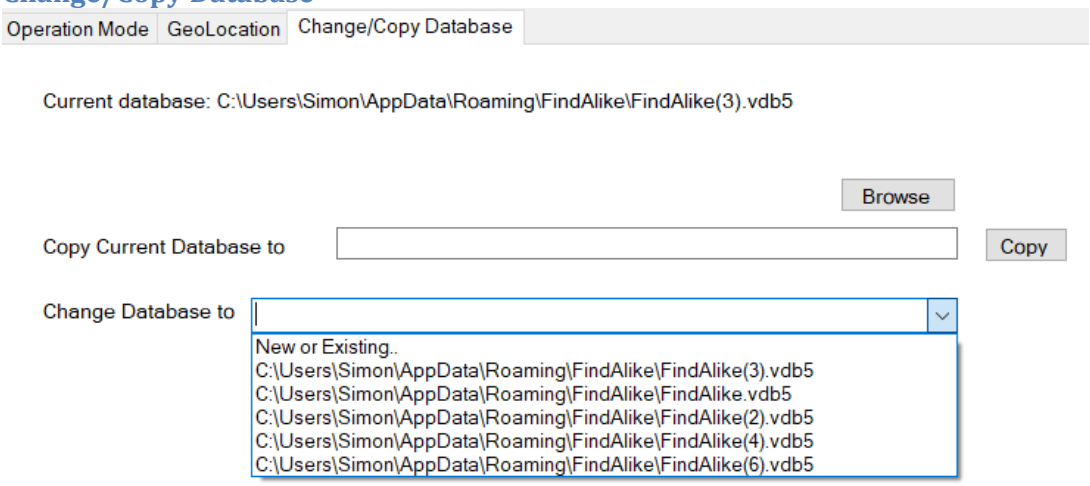


Figure 54 Change/Copy Database screen

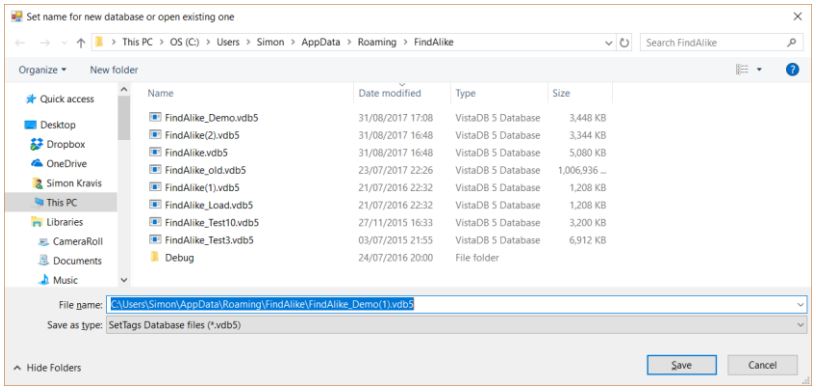
This screen allows the user to copy or change the database used by the application.

Copy

The Browse button allows the use to select a location to which the current database can be copied. Once it has been selected, this location appears in the 'Copy Current Database to' text box. Clicking Copy then executes the copy. This functionality can be used to copy a database onto a removable drive so that slideshows can be shown from any computer with SetTags installed. However, the Facet Folder location will have to be changed to use the drive letter assigned to the removable drive on a different computer.

Change Database

New database names can be selected from the dropdown, which contains all the database names which have been the change destination. Clicking Save when "New or Existing.." is selected from the combo box creates a new database with this name if the name does not exist. In this case, an empty database is created, using the default facet folder location. A non-existent name is created as the default when browsing by adding a sequence number to the current database path, as shown below. License information from the current database is copied to the new one. The default browse folder is the default location for databases, which is (C:\Users\<user>\AppData\Roaming\FindAlike). All databases have the extension .vdb5. Note that only the file name should be specified for a new database after browsing to a new folder.



If the suggested new database name is not used, an existing database may be selected to open. This allows the use of a completely separate set of tags. Note that the application is restarted after changing the database.

Workgroup Operation

In Workgroup mode, only one user (Workgroup Master) can change tags. For other users, tags are read-only, allowing central management. All users access the same tag list stored on a network database accessible to all users. If files or folders accessible to multiple users are to be tagged, the facet folder must be in a location accessible to all users. This may be a shared disk drive accessed via a Local Area Network (LAN). Mail messages are stored in the local databases and are not shared between multiple users.

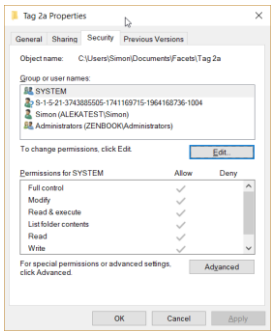
If SetTags is being used by multiple users who do not share access to filesystem storage but instead share cloud storage (such as Microsoft SharePoint, Microsoft Teams or DropBox), URLs of documents in cloud storage can be tagged and have descriptions added which can then be shared between users. In order to do this, all users must have access to a SQL Server Network database, which may be on a Virtual Private Server. The setup of such a database is described in the document SetTags Prep Install Support. In this case a Cloud license should not be used, and individual users will access facet folders in their own local storage. However, the tag list will come from the Network database.

Setting Workgroup Licenses

On installation, SetTags creates a demo license for each user, with a locally accessible facet folder. The Workgroup Master license should then be installed by the user who will administer the set of tags which can be applied. A SQL Server database should then be created in a location accessible to all workgroup users using the script provided in the document Set Tags Prep Install and Support. One the Workgroup Master license is installed, the Network database should be set to the SQL server database. If the workgroup share disk storage, a facet folder should be created in a location accessible to all workgroup users. Other Workgroup users should then install their Workgroup licenses and set the Network database to the newly created SQL Server database and the Facet folder to the location specified by the Workgroup Master user, if there is commonly accessible and storage. If not, individual Workgroup users will retain different Facet folders and may only share tagged URLs with other Workgroup users

Workgroup Access Control

In a multi-user environment, not all users have access to all items. Access control for tagged files and folders can be set by the Workgroup Master user setting permissions on the facet folder sub-folders via Windows properties which can be set by right-clicking:



If a user has no read access to a facet sub-folder, the tag will not appear in the tag list. If there are individual files to which the user does not have read access in a folder which is accessible, these files will not be listed as folder contents and will not appear in the SetTags grid.

A Workgroup license is required for multi-user operation, or if a single user wishes to access files on a network drive. For multi-user operation, a single user is designated the Workgroup Master user. This user can edit tags and define facet folder location and has all the capability of a desktop individual license. Other users receive a Workgroup license via a script which writes registry values. Workgroup users have restricted functionality as detailed below:

Differences between Desktop and Workgroup Licenses

Desktop	Workgroup	Workgroup Master
No access to files on servers – local machine (including attached USB drives) only.	Access to files and folders on file servers.	Access to files and folders on file servers.
Can access single Vista database only as local and network database	No user control of databases. Uses local Vista database and SQL Server database as network database	Can access Vista or SQL Server databases as local and network database
Full control of tags and tag filters	No editing of tags, local option for tag filter	Tags and network tag filters centrally managed by Workgroup Master user.
User license stored on local database.	License stored on network database.	License stored on network database.
No additional database required.	Access to a SQL Server database required (can be SQL Server Express).	Access to a SQL Server database required (can be SQL Server Express).
Facet Folder on local drive by default	Workgroup Users access facet folder specified by Workgroup Master user	Can define facet folder and set permissions for individual tags

Workgroup Masters and Other Users

Where a Workgroup license is being used with a single user, the user is a Workgroup Master user who has full capability to change facet folder locations and manage tags. Where centralised control of tag management and shared facet folder location is required, the Workgroup Master should access a SQL Server Master database as the Network database. The database access credentials should support creation and modification of tables for the database. If tagged folder and files are to be shared, the Workgroup Master User should also specify a facet folder location which is accessible to all other users on a shared drive. If SetTags is only being use to tag URLs, a globally accessible facet folder is not required. Other Workgroup users will access their local VistaDB database and the network database with a SQL Server connection string. The licensing limit for Workgroup licenses limits the number of different accounts accessing the SQL Server Master database over a 24 hour period to the number specified in the license.

Local and Network Connections

The installation of SetTags uses a default VistaDB database at C:\Users\UserName\AppData\Roaming\FindAlike\FindAlike.vdb5. A desktop license allows this to be changed, but the Network database is always the same as the Local database. A Workgroup Master license allows the use of a SQL Server database or a Vista database as the local and network database.

Workgroup Licensing

Installation of SetTags generates a Desktop demo license. The Workgroup Master should then enter their license key and set the Network database to an accessible SQL Server database.

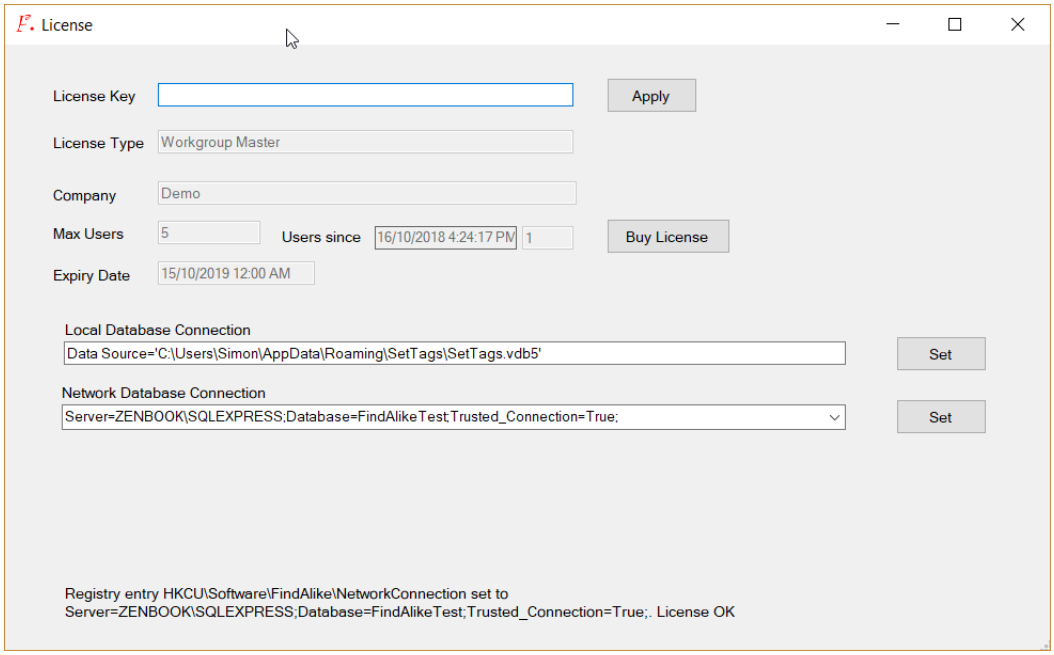


Figure 55 License screen after entry of Workgroup Master license

Tag Filter

For Workgroup license, users may use the centrally defined Tag Filter options by selecting Network as the Filter source:

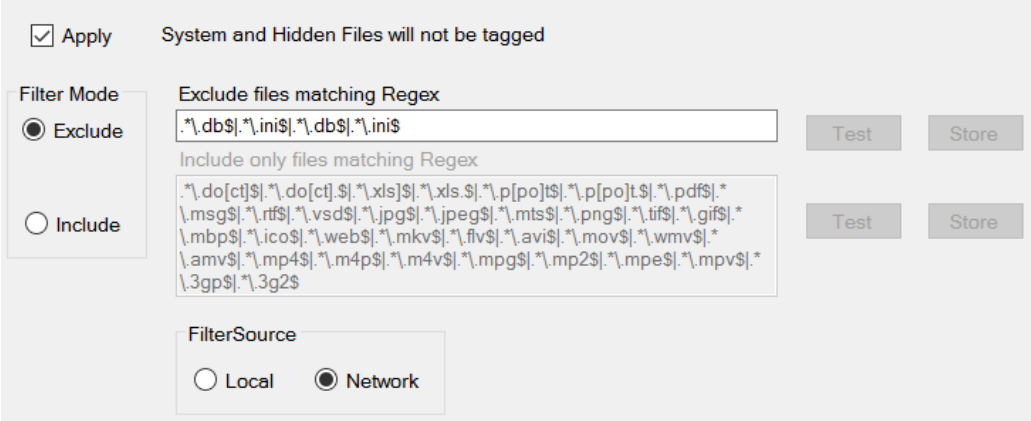


Figure 56 Filters centrally defined from Network with no editing allowed

By selecting Local as the Filter Source, a filter unique to the user can be defined and edited:

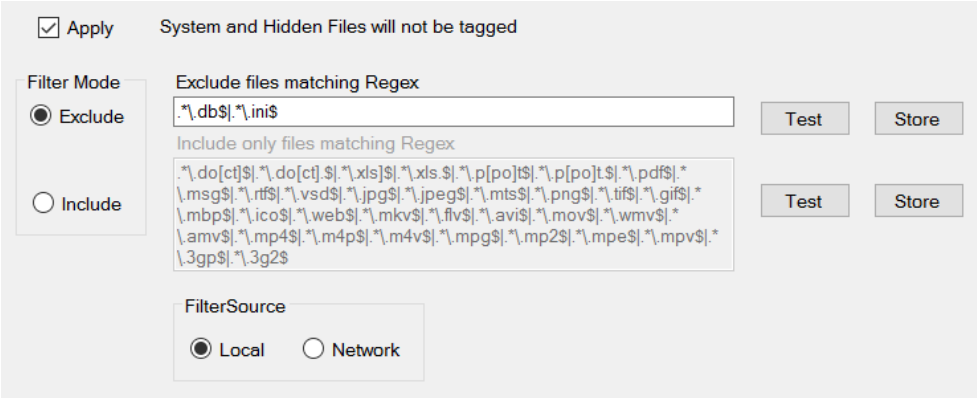


Figure 57 Filters locally defined and editable

The Workgroup Master user can make changes to the filters which will be visible to all Workgroup Users.

Appendices

Errors

Errors generated by any SetTags operation can be viewed by clicking the View-> Errors menu item as shown
below:

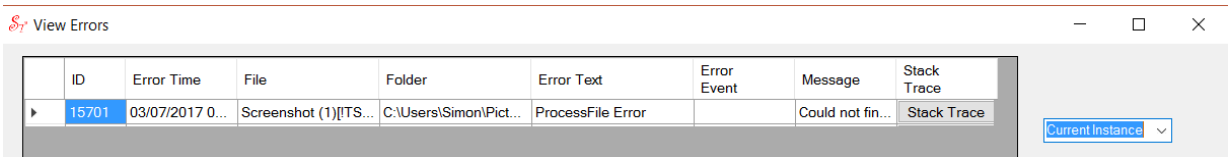


Figure 58 Errors from Current Instance

The default option is to show only errors which have occurred during the current SetTags run, (Current Instance in the combo box to the right of the error display but All Errors can also be displayed:

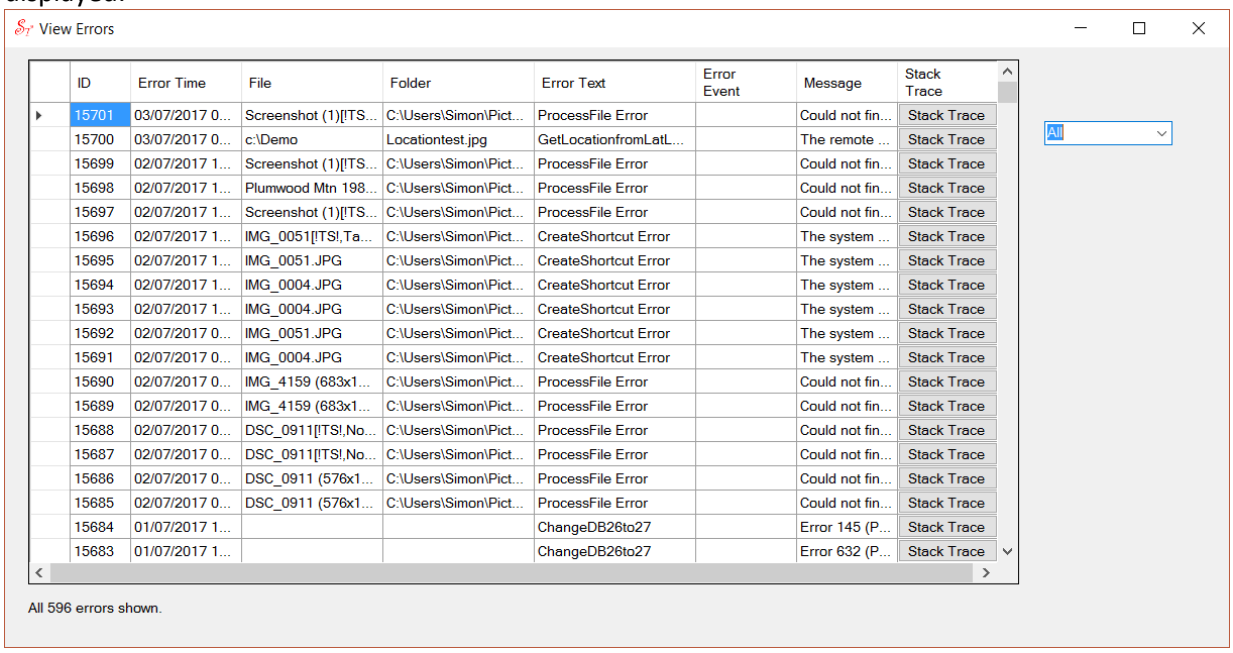
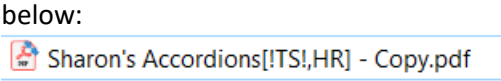


Figure 59 Display of all errors

Copying Tagged Files

As tags are stored in the file name, copying a file with Windows Explorer will result in the "Copy being appended before the dot separating the file from the extension. Although the tags appear in the file name, a shortcut to the file will not be created in the appropriate facet folder and it will not be visible if files with any of the tags appearing in the name are selected. To ensure that copied tagged files appear in this case, the tag (or tags) should be re-applied to the copied file. In this case the tag name string will appear before the " – Copy" part of the name as shown below:



Known Bugs and Workarounds

Warning message when tagging files stored on USB drive

USB drives often use the FAT32 (File Allocation Table) filesystem rather than the NTFS (New Technology File System) format used by hard drive and computer internal storage. The FAT32 filesystem does not support writing of file metadata to the same extent that NTFS does. If files are stored on a FAT32 filesystem, a warning message is generated that failures may result when deleting tags from files which have been moved, as file metadata is used to indicate the location of shortcuts pointing to files. If files have not been moved, then no problems will arise. For maximum flexibility, USB drives should be formatted as NTFS filesystems, but this will erase any data stored on them. Metadata setting on FAT32 drives is much slower than on NTFS drives.