

# Tags Admin Guide

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Setting and assigning Tags



# What are Tags?

Tags are a Slice & Dice, Charting and cubeTV feature designed to give you even more flexibility in reporting, and allows you to dive into your data even faster.

Tags breaks free of the hierarchical structures of Slice & Dice's standard reporting, to customise reporting to fit your company's individual needs

Use the Tag feature to report on virtually any combo of data - from how your new hires are stacking up against each other, to how different teams within the same office are performing, all without having to manually select or deselect the data

The screenshot displays the 'Tags' management interface. At the top, there are tabs for 'Create Tags', 'Assign Tags', and 'Bulk Update'. The main area is divided into two sections: 'CREATE TAG CATEGORIES' and 'CREATE TAGS'.

**CREATE TAG CATEGORIES:** This section includes a text input field for 'Enter new category name here' and a '+ CREATE CATEGORY' button. Below this is a search bar and a table listing existing categories.

Name	Actions
Business Type	EDIT DELETE
Experience / Tenure	EDIT DELETE
Geographic Region	EDIT DELETE
Industry / Sector	EDIT DELETE
Reporting Manager	EDIT DELETE
Role	EDIT DELETE

**CREATE TAGS:** This section includes a text input field for 'Enter new tag name here', a dropdown menu for 'Select a category', and a '+ CREATE TAG' button. Below this is a search bar and a table listing existing tags.

Category	Name	Actions
Business Type :	Contract	EDIT DELETE
Business Type :	Perm	EDIT DELETE
Business Type :	Temp	EDIT DELETE
Experience / Tenure :	Experienced	EDIT DELETE
Experience / Tenure :	Graduate	EDIT DELETE
Experience / Tenure :	Mentor	EDIT DELETE
Experience / Tenure :	Probation	EDIT DELETE
Experience / Tenure :	Trainee	EDIT DELETE
Role :	Back-Office / Admin	EDIT DELETE
Role :	CEO	EDIT DELETE
Role :	Consultant (US = Recruiter)	EDIT DELETE
Role :	Director	EDIT DELETE
Role :	Finance	EDIT DELETE
Role :	Manager - Billing	EDIT DELETE
Role :	Manager - Non-Billing	EDIT DELETE
Role :	Non-exec Director	EDIT DELETE
Role :	Resourcer	EDIT DELETE
Role :	Senior consultant (US = Senior Recruiter)	EDIT DELETE

# Setting up Tags

Head to the dashboard menu and select Admin. You need to be a User Admin to do this.

Assign users the right to manage Tags.

Do this by clicking into Users on the left-hand menu and selecting the name of the team member you would like to give this admin privilege to.

Scroll to the bottom of the team member's profile. You will see a variety of Admin Permission check boxes. Select Tags Admin and save.

The screenshot displays the user management interface for a user named Ken Adams. The user's role is 'Observer'. The interface shows the user's profile and a list of permissions. The 'Tags Admin' permission is checked, indicated by a yellow arrow pointing to the checkbox. The 'APP PERMISSIONS' list includes: cubeTV, Charting, Jobs Pipeline (beta), OneView, OnPoint, Slice & Dice, and Usage. The 'ADMIN PERMISSIONS' list includes: Actuals Admin, cubeTV Admin, Company Settings Admin, Group Admin, IP Access Admin, Job Pipeline Admin, Metrics Admin, Ratio Admin, User Admin, Section Admin, Tags Admin, Target Admin, and Timezone Admin. The 'Tags Admin' checkbox is checked, and a yellow arrow points to it from the right.

# Tags Admin

Tags are used to further segment the data in cube19 to allow reporting and cubeTV to show data outside of the constricts of the group hierarchy

Scroll to the top of the page, and back to the admin menu on the left-hand side. Select Tags. There are three areas of Tags, Create Tags, Assign Tags, and Bulk Update.

Create Tags is used to create new Tag categories and tags to sit within each category.

Tag Categories are like a folder, and Tags are like the files in that folder. Tags are used to segment the data, and Tag Categories to keep the tags organised.

Add categories like job roles, industry sectors, geographical regions, and experience level.

Enter a New Tag Category and select Create Category to add new Tag Categories like Geographical Region or Industry Sector.

Enter a New Tag and select Create Tag to add new Tags within a Tag Category – like New York, Singapore, or London.

Name	Actions
Business Type	<a href="#">EDIT</a> <a href="#">DELETE</a>
Competition	<a href="#">EDIT</a> <a href="#">DELETE</a>
Experience / Tenure	<a href="#">EDIT</a> <a href="#">DELETE</a>
Geographical Region	<a href="#">EDIT</a> <a href="#">DELETE</a>
Industry Sector	<a href="#">EDIT</a> <a href="#">DELETE</a>
Reporting Manager	<a href="#">EDIT</a> <a href="#">DELETE</a>
Role	<a href="#">EDIT</a> <a href="#">DELETE</a>

Once the tag category and tags have been created, go to the Assign Tags sub-menu to assign individuals or groups the new tags.

Select the user or group to assign a tag to and click Add Tag. Choose the tag needed from the dropdown menu and assign a start date and end date (if needed) for the tag.

There are no limits to the amount of tags that are added to a user or group and tags can be set historically and with a future start date.

Once the tags have been saved and processed, they will then be added to the user or group and will be available in Slice & Dice, cubeTV and Charting.

The bulk update tab allows for multiple tags to be added to multiple users and groups. Please contact your Customer Success Manager for more information before using this option.

Jennifer Laurel

Tags History for: **Jenny Laurel**

Company View

+ ADD TAG

Tag	Start date	End date	Action
Business Type: <b>Perm</b>	14/06/2005	DD/MM/YYYY	Delete
Experience / Tenure: <b>Experienced</b>	14/06/2005	DD/MM/YYYY	Delete
Geographical Region: <b>London</b>	14/06/2005	DD/MM/YYYY	Delete
Industry Sector: <b>IT</b>	14/06/2005	13/07/2011	Delete
Industry Sector: <b>Energy</b>	14/07/2011	DD/MM/YYYY	Delete

CANCEL SAVE

INHERITED TAGS

Tag	Inherited from	Start date	End date
⚠ There is no tag history to display			

# Tags Examples

# Business Type

Using the Business Type tag, you can easily separate your Perm and Contract activity or revenue.

This option can be used in standard reporting to show the entire perm business activity and revenue in one report, rather than running the report by group to collate the information.

It can be used in Charting to separate your Perm and Contract consultants on revenue to see which area of the business is performing the strongest.

This tag is great for cubeTV, allowing for both perm and contract activity and sales leaderboards.

2 metrics selected | cubel9 Demo

Match Any Tags | Business Type: Perm x

Match All Tags | Select tags

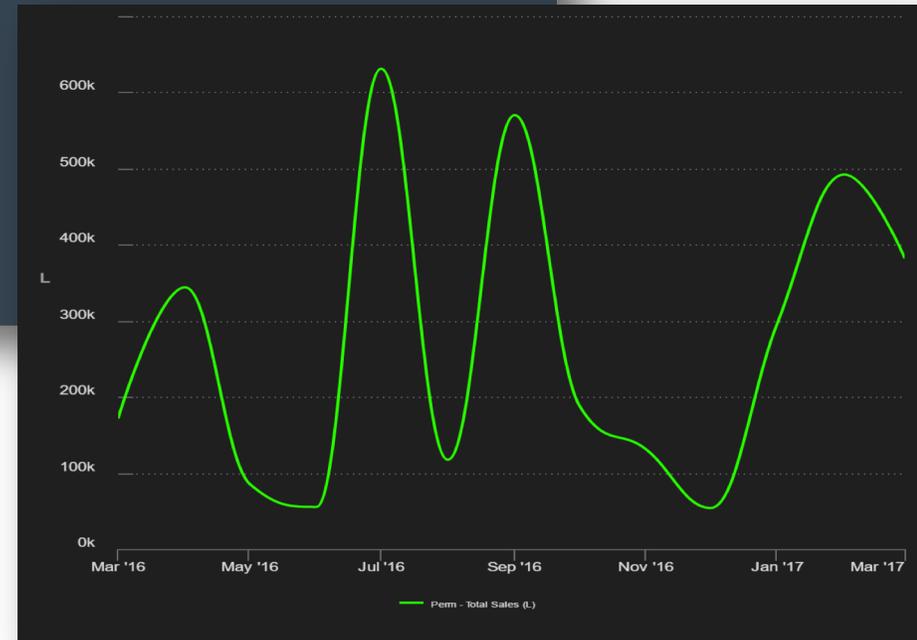
Display options |  Show Totals |  Show Rows For Use

SAVE REPORT | SAVE TO FILE

Currently viewing Custom Report data for: cubel9 Demo

Sum (Whole numbers) | Kpi value

Owner	Kpi name	Total Sales	Total Starters	Totals
Adina Deforge		110,392	5	110,397
Adria Zapata		58,898	3	58,901
Bill Norris		10,494	1	10,495
Charla Thompson		48,464	2	48,466
Glaysd Waggener		1,795	1	1,796
Karl Bryner		8,207	1	8,208
Kattie Cowell		13,101	1	13,102
Magan Falgoust		68,255	6	68,261
Marci Pauly			1	1
May Blankenship		55,147	3	55,150
Shameka Langlins		12,239	1	12,240
Stevie Bowens		1,628	2	1,630
Zach Mcfarland		23,885	10	23,895
Totals		412,503	37	412,540



# Experience

Using experience tags, you can separate all new starters into their own leader boards for the big screens to help drive the internal competition.

This will also allow you to look back over historical data in Slice & Dice and see how long it took for your consultants to make their first placement and what activity they were generating at the start of their career. This information can then be used to look at new starters and what priority metrics you are setting.

Sales Leaderboard • Perm • MTD				cubeTV			
RANK	NAME	DEALS	AMOUNT	TOP PERFORMER 3			
1	Zach Mcfarland	10	£51,848	<div style="text-align: center;">  <p><b>Steve Konrad</b></p> <p>Biggest Deal - Perm MTD <b>A\$19,809</b></p> <p>Avg Fee - Perm MTD <b>24%</b></p> </div>			
2	Kattie Cowell	4	£32,915				
3	Steve Konrad	5	£28,950				
4	Dom Sackett	2	£14,038				
5	Magan Falgoust	1	£14,009				
6	Karl Bryner	1	£7,462				
7	Yolande Bedell	0.50	£3,925				
8	Charla Thompson	0.50	£3,538				
9	Adria Zapata						
9	Bill Norris						

	Kpi name	1st Interviews	Jobs Added	CVs Sent	Total Placements	Total Sales	Totals
Owner							
Adina Deforge		53	9	135	4	85,629	85,830
Adria Zapata		25	36		9	89,384	89,454
Arten Henrich			2	1			3
Barbara Strait		4	12	6	7	13,872	13,901
Bill Norris		16	17	21	11	391,753	391,818
Candie Kitman			1				1
Charla Thompson			2		4	91,558	91,564
Charlie Hoadley		54	7	109	7	72,022	72,199
Colette Hitch		3	4	13			20

# Geographical Region/Industry Sector

By adding the correct locations to each of your offices, you can easily run Slice & Dice reports and look at each office separately, if your hierarchy is currently designed by Industry Sector and vice versa.

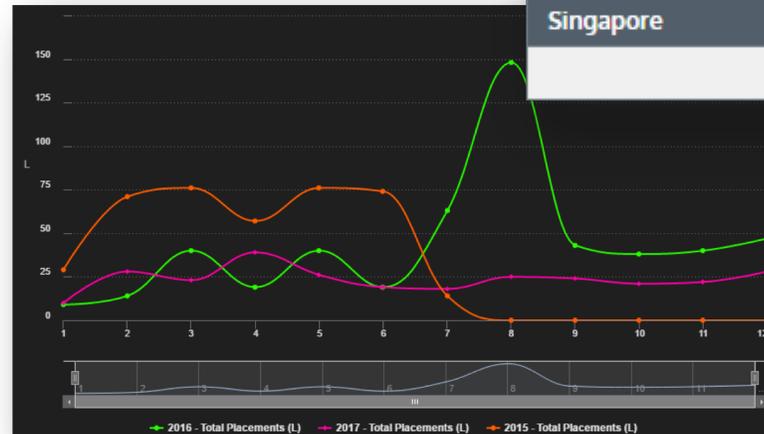
You will be able to set up leader boards on your big screens which can show users in specific offices/industry sectors and also create trend charts to look at each region/office or vertical individually to analyse and seasonal changes.

Use these tags in Charting to overlay each tag across multiple time periods and to see which industry sectors are performing the best over any time period.

Sales Leaderboard • Perm • MTD cubeTV

RANK	NAME	DEALS	AMOUNT	TOP PERFORMER
1	Zach Mcfarland	10	£51,848	<div style="border: 1px solid black; padding: 5px;"> <p><b>Steve Konrad</b></p>  <p>Biggest Deal - Perm MTD <b>A\$19,809</b></p> <p>Avg Fee - Perm MTD <b>24%</b></p> </div>
2	Kattie Cowell	4	£32,915	
3	Steve Konrad	5	£28,950	
4	Dom Sackett	2	£14,038	
5	Magan Falgoust	1	£14,009	
6	Karl Bryner	1	£7,462	
7	Yolande Bedell	0.50	£3,925	
8	Charla Thompson	0.50	£3,538	
9	Adria Zapata			
9	Bill Norris			

	Kpi name	Total Sales	Totals
	Tag for Geographical Region		
	London	2,329,634	2,329,634
	Singapore	1,160,491	1,160,491
	Totals	3,490,125	3,490,125



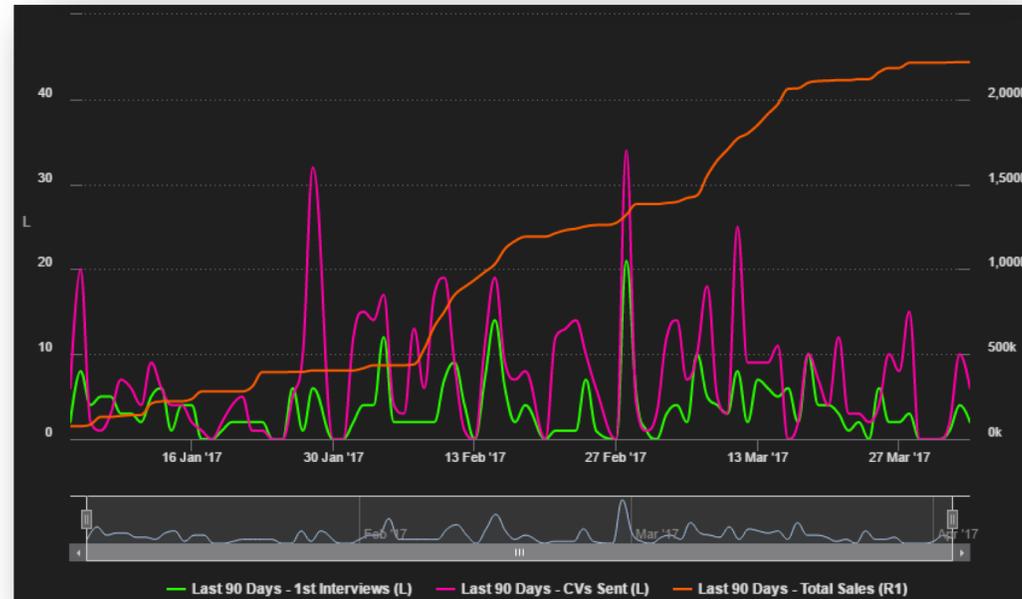
# Business Role

By using a Business Role tag, you can easily remove certain individuals data from your reports and leader boards.

Directors in the business and Non-billing managers may do a few deals here and there but these wouldn't need to be reflected in your numbers.

Tagging a user with a business role can also make sure that any back office users data won't show in activity reports or trends.

	Kpi name	1st Interviews	Jobs Added	CVs Sent	Total Placements	Total Sales	Totals
Owner							
Adina Deforge		53	9	135	4	85,629	85,830
Adria Zapata		25	36		9	89,384	89,454
Arlen Henrich			2	1			3
Barbara Strait		4	12	6	7	13,872	13,901
Bill Norris		16	17	21	11	391,753	391,818
Candie Kitzman			1				1
Charla Thompson			2		4	91,558	91,564
Charlie Hoadley		54	7	109	7	72,022	72,199
Colette Hitch		3	4	13			20



# Reporting Manager

Using the Reporting Manager tag, you can start to look at all users who report to the one manager, regardless of which team/group they may be in.

Very often there will be examples of different groups reporting into the same manager, and this tag now allows full visibility of each team/groups data under a single manager tag.

The Reporting Manager in Charting gives you visibility over how well your manager leads their team over time and what a successful leader looks like in your business.

		Kpi name	CVs Sent	Totals
Owner	Group			
Adina Deforge	Perm		25	25
Glayds Waggener	IT		2	2
Kattie Cowell	Finance		1	1
Magan Falgoust	IT		7	7
May Blankenship	IT		31	31
Totals			66	66



# Frequently Asked Questions

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**Q. How many tags & tag categories can I have?**

A. You can add as many tags & tag categories as you need.

**Q. Can I set against clients and create targets based on tags?**

A. No. Tags are only used for your recruiters and they can not be targeted.

**Q. Can I use tags in other areas of cube19?**

A. At present, tags are only available in Slice & Dice, cubeTV and Charting.

**Q. What do I do if I'm unsure on how to use tags effectively?**

A. If you have any problems or need advice on tags, please email [support@cube19.com](mailto:support@cube19.com). One of our team will be able to investigate and follow up on the issue with you.



Growth Analytics for Recruitment Companies

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