



Program Tag Configurations

NBIS Release Version: 4.0

Updated Date: 05/23/2022

File ID: REF-005

Application Section: Organization Management

User Roles: Program Tag Manager

Table of Contents:

Program Tag Permission Levels	1
Program Tag Usage.....	1
Program Tag Visibility	2
Program Tag Configuration Options	2
Program Tag Configuration Restrictions	2

Program Tag Permission Levels

Action	Permission	
	Tag Owner	Tag Modifier
View Tag Details	Yes	Yes
Edit Tag Details	Yes	No
View Tag Owners	Yes	No
Approve/Deny Tag Requests for their Org	Yes	No
Configure a Program Tag for their Org	Yes	Yes
View Outgoing requests	Yes	Yes

Program Tag Usage

Where its Used	How it's used
Users	Users utilize the program tag in their User Assignment Capabilities to grant them access to view or work on cases/tasks. The user must have this tag to open the case even in read-only mode. This does not allow them to be assigned the case to work." To "This tag allows the users to open a case in read-only mode.
Cases/Tasks	Cases/tasks automatically have the program tags of the subject added. It is the organization's responsibility to implement the tag for it to have any effect on the view/assignment permissions or workflow.
Subjects	Subjects have their respective organizations' program tags added to their profile. These add visibility/assignment permissions to all cases related to this subject.
System Engines and Configurations	Certain configurations for the organization (notifications, assignment rules, Workflow Builder, etc.) can use program tags to further expand their capabilities.





Program Tag Visibility

Program Tag Visibility	Description
Private	Other organizations cannot request to join the tag. It will only be available to this organization.
Protected	Other organizations must request to be a Tag Modifier or Tag Owner
Public	Other organizations can join as a Tag Modifier without going through the requesting process. Organizations must still request to be Tag Owner.

Program Tag Configuration Options

Configuration Field Name	Description
Organization	Determines if the tag is enabled for the current organization
System Engines	Enables the tag to be used with org configurations such as notifications, assignment rules, or Workflow Builder.
Tag Restrictions	Determines if the tag can restrict a user's access to a case (see table below)

Program Tag Configuration Restrictions

Program Tag Configuration Restriction	Functionality	Description
No restrictions	Label/Non Restrictive	No restrictions are placed on the case by adding this tag. This tag cannot be applied to user assignment capabilities. This makes the tag a label for subjects and is the default value for all tags when created or joined.
Open the case	Restrictive, NBIS Configurations	This tag allows the users to open a case in read-only mode. This does not allow them to be assigned the case to work.
Work on the case	Restrictive, NBIS Configurations	The user must have this tag to be able to be assigned the case. This includes the permission to open and view the case.
View the Subject	Hide Subject, Restrictive, NBIS Configurations	The user must have this program tag to search for or view the subject in subject management. This also includes the permissions to Open and Work on any cases for this subject.

