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| Program Tag Configurations | | | |
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| **Application Section:** Organization Management | | **User Roles:** Program Tag Manager | |
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# Program Tag Permission Levels

|  |  |  |
| --- | --- | --- |
|  | Permission | |
| Action | 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. |