



www.taggtool.com

Version 3

User Guide

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What is a tag?

A tag is a textual label which you associate to a physical file, the idea is that you search on these tags in order to find your files rather than manually navigating through the traditional directory hierarchy on your hard disk using the file explorer.

Any number of tags can be attached to a file making searching far more powerful. Prior to using tags, a file could only be found if you knew either the exact location of the directory in which it lived or the exact file name in order to search for it.

With tags you effectively add multiple search labels to a file and searching on one or more of the tags will return the file or files you are interested in.

A tag can be a single word such as 'photo', it can also consist of multiple words such as 'tax return'. To help reduce tag ambiguity dot notation can be used to indicate a context such as 'computers.apple' and 'recipe.ingredient.apple', this type of tag is called a hierarchical tag.

Tip - tags consisting of multiple words must be surrounded with double quotes, Examples: "tax return" , "art.self portrait"

Tags are case insensitive so you can enter your tags in lower case, upper or mixed case. Taggtool will automatically change the case of a tag you enter if it finds that a tag already exists with a different case.

Where are the tags stored?

All tag information is stored inside a powerful database rather than inside your files, this is done for technical and privacy reasons.

Certain file types such as pdf's and Microsoft Office allow metadata to be embedded into the file itself whilst useful also means that if you email or copy a document onto a memory stick or optical disc that person would be able to view your metadata with ease.

Taggtool attempts to offer the best of both worlds by keeping your tags separate from your files and extracting any embedded metadata it finds into it's database for searching.

What is a tag structure

Sometimes you may want to add more structure to the way you tag up files, for instance if you are sharing a database with another user you may want to make sure that a basic tagging structure is used so that a common set of tags are used rather than a complete free for all.

To facilitate this, tag structures can be designed and shared between users.

An example tag structure

documents documents.accounts documents.sales documents.marketing.pressrelease

How do I create a tag structure?

Tag structures are created with the 'Tag Structures' panel in the options dialog.

There are 2 ways to create a tag structure, the first and way is to use the Tag Structures control panel situated in the Options dialog.

Using this panel, you can specify where the tag structures should be saved, by default they are saved under the user's documents -> tagg directory but you can change this location to be somewhere on a network drive if you wish to share the structures with other users.

Tags are displayed in a tree view, so for example the tag 'documents.marketing.pressrelease' would be displayed as

Documents marketing pressrelease

To insert or remove a tag node click the right mouse button to display the popup menu, tag structures are saved automatically as you add/remove or rename tag nodes.

Tagging a File

There are 2 ways to manually add tags to a file, the first method is to use the 'Tag Files' screen in the main Taggtool application and the second way is to directly tag files from within the Windows file explorer.

Tagging files using the main application

Select the 'Tag Files' tab on the main screen to activate the Tagging screen.

Navigate through the tree, selecting those files or directories you wish to tag.

Using the built-in plugins you can preview the file before adding it, this gives you the ability to add a precise file title, description and tags.

To add a tag you have used before, either type the first few letters so that auto-complete pops up a menu of tags which match or click and drag a tag from the tag cloud to the add tags text field.

To add your own tags, simply type directly into the add tags text field, multiple tags should be comma delimited and multi-word tags surrounded with double quotes.

To add the tagged file to the database, click the 'Save' button.

To select all files in a directory right click on the name of the directory to display the popup menu, from this menu select 'Select all'. This will select all files in the directory, it will also select files inside any nested directories.

Using directory bookmarks

Directory bookmarks provide the ability to position the file system tree view to a particular directory with a single click, it is useful when you find yourself navigating to the same directory time and time again to tag files.

To add a directory bookmark right click on any directory name, select 'Bookmark' from the popup menu.

The next time you need to tag a file in that directory, simply select the directory from the combobox located above the file system tree view.

Tagging files directly from Windows file explorer

Using the Windows file explorer navigate to the file(s) you wish to tag then right click your selection to display the popup menu. Select 'Add Tags..' menu option to reveal the metadata panel, enter some tags then click on the 'save' button.

Understanding the metadata panel

The metadata panel displays all associated metadata information for any item(s) you have selected from either the search results panel or the tag files panel.

The metadata panel consists of 2 tab pages, namely 'Metadata' and 'Preview'.

Metadata

This tab page displays metadata you have added such as tags, descriptions, aliases and ratings as well as any embedded metadata extracted from the file.

You can modify the following metadata:

Tags

Alias

Description

Rating

Assigning tags - Multiple selection behaviour

When you select multiple tagged items the existing tags display panel will show a distinct view of all the tags used, for example if we had the following 2 files selected

File	Tags
finances.xls	money,finance,personal
insurance.pdf	finance,car

The existing tags panel will display the following tags:

car(1)+- finance(2)- money(1)+- personal(1)+-

The numbers in the parenthesis indicate the number of times the tag is used in the selection.

You can use the plus and minus buttons to add and remove tags currently in use, for instance to also assign the tag money to all of the selected items you would click the plus button next to the money tag.

At this point the 2 files would look like this

File	Tags
finances.xls	money,finance,personal
insurance.pdf	finance,car,money

Similarly you can use the minus symbol to remove a tag from all of the selected items. Embedded Metadata

To view any embedded metadata associated with a file, click on the Embedded tab.

This will display any embedded metadata extracted from files such as

MP3 music files JPG photo's MS Office documents ADS (Alternative Data Streams - NTFS file systems only)

Previewing a file

Before assigning tags to a file it is often useful to view the contents of the file, there are 2 ways to do this.

The first way is to simply launch the file by double clicking the file name from either the search panel or the tag files panel, the file will be opened with the default application associated with the file type. i.e. Word will be launched to display .doc files.

The second method involves the use of the plugins panel, Taggtool includes various plugins which make it easy to quickly preview the contents of a file without having to switch between third party applications.

Plugins provided

Plugin	Supported Formats
Audio	mp3,wav,ogg
Image	bmp,jpg,gif & png
Zip	zip,jar
Text	txt,bat
HTML	html

To preview a file using the plugins, click on the 'Plugins' tab page.

Importing files - Scan Folder

Certain file formats such as jpeg, mp3 and MS Office documents have the ability to store basic metadata inside the physical file.

For example, Microsoft office documents usually contain data items such as the author of a document and photos saved in the jpeg format often contain data such as the make and model of a camera used to take a photo as well as more detailed information such as the exposure setting.

The scan folder feature in Taggtool will search for any files which contain metadata and automatically import them into the active database.

This means that you can perform searches on the imported metadata, for example if we had imported some MS Office documents we could search for all documents created by a specific author by using the following search command:

```
author=jsmith
```

To perform a scan of a specific folder, select the 'Scan Folder' option from the Tools menu.

Choose the directory to scan, click ok.

Any files which contain embedded metadata will be added to your database.

Importing files - Scan System

The scan system is an extension to the scan folder feature, the main difference is that you can scan entire drives and volumes.

To perform a system scan, select the 'Scan Folder' option from the Tools menu.

Updating tagged items

Occasionally you will want to modify the tags attached to your files, there are 2 ways of updating your tagged items:

1) From the 'Tag files' panel 2) From the 'Search' panel

1) Making changes to files from the 'Tag Files' panel.

The first thing to do is navigate to the file or file(s) you wish to update, use the file system tree view to navigate around your file system.

Select the file(s) you wish to update (Hold down the shift key to select multiple files)

Use the metadata panel to add/remove tags as well as change the description and rating if required.

When you are happy with the changes, click on the save button.

2) Making changes from the 'Search' panel

Rather than having to navigate through the file system it is easier to perform a search for the files you wish to modify.

Select the file(s) from the search results panel using the left mouse button (Shift-click to select multiple items).

Make your changes in the metadata panel as described above, click the save button to complete.

Creating a database

When you run Taggtool for the first time, a default database is created for you.

In most cases this database is all you need however if you are going to be tagging a very large amount of files and like the idea of separating them into multiple databases then you can.

As an example you may want to create a photos database, a music database and a personal files database.

To create a new database select the 'Create Database' button from the toolbar.

Enter a name for the database, some examples of valid database names:

photos recipes college work legal documents

If you are planning to use Taggtool Server edition then you need to make sure that the 'shared database checkbox' is selected.

The checkbox ensures that only files accessible to users of the network can be tagged, this avoids the problem of users tagging files on their local computers which no one else can access.

Important: Once set it is not possible to switch existing tagged files from one representation to the other so choose carefully!

Switching between databases

To select a different database, click the 'Select Database' button in the tool bar.

A dialog window will be displayed containing a list of all Taggtool databases. Highlight the database you would like to activate then click the OK button or double click.

Importing a Taggtool legacy xml database

Version 3 of Taggtool introduced a new method of storing tags which replaced the xml files used in previous versions.

If you have a legacy database file which you would like to import then the 'Add an existing database' function will do just that.

To add an existing database, select the 'Add Existing Database' option in the Database tab of the 'Options' screen.

Select the database you wish to add then click the ok button.

Removing a database

If you wish to remove a database from your Taggtool environment, select the 'Remove database' button from the tool bar.

Entering search criteria

To perform a search for tagged items you enter space separated search terms, for instance to find all tagged items related to the tag 'photo' simply type photo into the search box.

As you type the first few letters of a tag, any matches to existing tags will be displayed in a pop-up list - if the list contains the tag you wish to add to your search criteria then select it from the list either with the mouse or by pressing the down cursor twice followed by the enter key.

You can dismiss the suggestion box by pressing the escape key.

Instead of typing in tags you can also select them from existing tag structures, right clicking in the search box will open a pop-up menu containing all tag structures which you can navigate through just like any other menu system.

You can also select tags from the 'Used Tags' menu, this menu lists all tags which are in use in the current database organized alphabetically.

You can enter as many search terms as you like, as well as searching the database for the specific terms entered Taggtool will also search against file names, file paths, file descriptions and volume names so you could search for all PDF files by simply typing .pdf

To exclude a results matching a specific term you can use the minus (-) symbol, for example to search for photos but not holiday photos you could enter photo -holiday.

To search for multi-word tags you must surround the search term with double quotes, i.e. "college work".

To exclude multi-word tags, place the minus symbol before the quotes i.e. documents -"college work"

Search Results display

Taggtool executes your searches in real-time as you type, search results are displayed in the results panel located below the search box.

There are currently 3 different results views you can use:

1. Multi View 2. Grid View 3. List View

Multi View

By default the multi view display is used, this view categorizes your search results into 4 distinct sections

File section Displays all files other than pictures and

pdf's

Pictures section	Displays images as thumbnails
PDF section	Displays PDF files as thumbnails
Web section	Displays website bookmarks

Grid View

The grid view displays all search hits in one big table with various columns including file name, path, volume and file size.

List View

The list view displays hits with minimal information in order to create a basic view.

To switch between views, use the small view icons located towards the bottom right of the results view panel.

Search Filter

Once you have entered your search criteria you can further narrow down your results by applying a search filter.

Available Filters include

- Images filter (*.bmp, *.ico, *.jpg, *.png, *.gif)
- Audio filter (*.wav, *.mp3, *.ogg)
- Text filter (*.txt)
- Zip filter (*.zip, *.jar)
- HTML filter (*.html)
- PDF filter (*.pdf)

To apply a filter simply expand the 'Advanced search' section by clicking on the "+" symbol and select a value from the filter combo box.

Quick Search

Sometimes it's useful to pull up a list of all pdf files or all office documents, rather than write some search terms to do this you can use the Quick Search panel.

To run a quick search, expand the quick search panel by clicking on the "+" symbol next to the 'Quick Search' label.

Simply click on one of the pre-defined quick searches to run.

Saving Searches

If you find yourself entering the same search criteria time and time again you can speed things up by saving the criteria for future use.

To save a search, click the small disk button located next to the search filter, the save search dialog will appear.

By default all searches are stored in a search folder called 'Default', to save the search enter a name for your search then click the ok button.

Search Folders

You can create your own search folders by selecting the 'New Folder' menu item from the 'Saved Searches' menu.

The Search folder dialog will appear, enter a name for your new folder then click the 'ok' button.

To re-organize any existing saved searches, use the Saved Searches maintenance panel located in the Options dialog accessible from the main tool bar.

Custom Applications

Often you may want to edit a file in a different application to the one associated with it by the Operating System.

With Taggtool you can create custom application commands to achieve this.

Click on the 'Settings' button in the main screen to launch the settings dialog, then select 'Custom Application Launcher'.

Enter a name for this command for example: Edit with Photo shop

Locate the application executable by clicking on the 'Browse' button.

Click 'Save'.

You can now select this Custom Application from the context menu in the search results window, you activate the context menu right click on a file in the search results screen.

When you select your custom application from the menu Taggtool will launch the application with the selected file name appended to the end of the command.

For example if we created a custom launcher for Notepad the command executed would look like:
Notepad.exe C:\documents\myfile.txt

If you need more control and would like to add command line switches you can make use of the following in-built macros.

\$File - Fully qualified path and file name i.e. C:\docs\expenses.xls \$Dir - Directory to file i.e. C:\docs

For example, to create a custom launcher which opens notepad and prints the document we could create the following command:

Executable command: Notepad.exe Parameters: /p \$File

Synchronizing your tagged files

Select the 'Sync' menu option from the Tools menu to activate the synchronize screen.

In most cases Taggtool will detect when a file is renamed or moved and automatically synchronise the database however if you are using Taggtool over a network it is possible that connectivity issues may cause Taggtool's database to become out of sync. If this happens you will need to use the straightforward 'Synchronize' feature to re-align Taggtool's internal database.

The synchronize process is made up of the following 3 steps:

- Step 1 - Run Report to list any out of sync files
- Step 2 - Search your computer's hard disk for possible matches
- Step 3 - Update the database with the new file locations

Step 1 - Run Report

The feature works by first examining the active database for any missing files, any files found to be missing will be listed in the Missing Files table.

Step 2 - Search

Before execute the search, you can limit the volumes or file systems that Taggtool will search to find the missing file(s).

Simply tick the checkboxes for each volume you would like Taggtool to search.

click 'Step 2 - Search' to activate the file search.

Any matches found will be displayed in the 'Missing Files' table, if Taggtool has located possible matches you can proceed to the next step in order to update the database with the new file location.

Step 3 - Resolve

The missing files table tells you which files are missing along with potential matches it has found, if there is more than one match for a file you can selected which match is the correct one by selecting the radio button in the last column.

If you do not wish to resolve specific files listed in the missing files table, you can use the first checkbox column to deselect the files, this tells Taggtool to ignore these files when the Resolve button is clicked to update the database.

Data Backup

Select the Backup' tab to activate the data backup screen.

The backup feature in Taggtool provides a fast and easy way to back up all of your tagged files across all of your databases.

For each database selected, Taggtool will copy the tagged files into a compressed zip file which you can then burn on to a CD or DVD for later recall in the event of data loss.

To access the backup feature select the 'Backup' tab on the main screen.

By default, Taggtool will save any backups in a directory named 'backups' under the 'Tagg' directory inside your user home directory.

If you wish to change this location click the Change button, this will open a directory chooser dialog from which you can select a different directory.

If you wish to view the current contents of the backup directory, click the folder button next to the change button, this will launch a window displaying the contents.

The backup feature creates a compressed zip file inside this directory when the backup process is run, by default this file name is auto-generated and uses the following format:

```
taggbackup-Day Month DayNumber HHMMSS TimeZone 4-digitYear.zip
```

An example output file would be named:

```
taggbackup-Thu May 24 074855 BST 2007.zip
```

You can override this name by simply entering a new name into the Backup file name text field.

If you are running multiple backups, i.e. creating a separate backup file for each database you can click the 'Generate' button in order to generate a new unique file name for each database you are backing up.

The next step prior to running the backup process is to select which databases you would like to backup, you do this by highlighting the database name in the list box.

After selecting which databases you are backing up, click the 'Backup' button to activate the backup process.

When running you will be given realtime feedback on the backup progress via the status table as well as the console at the bottom of the screen.

If you need to abort the backup, you can do so at any time by clicking the 'Stop' button.

Automatic Database backups

Taggtool uses a small but powerful internal database to store your tags, search folders and saved searches. In order to protect this data Taggtool automatically takes a copy of the internal database at regular intervals.

By default these copies are stored in the following directory:

```
C:\Users\[username]\Documents\Tagg\backups
```

Restoring from a backup

If the worst should happen and the internal database becomes corrupt you will be able to restore it by copying the contents of the backup zip file into the following directory:

C:\Users\[username]\Documents\Tagg\Database

Delicious Integration

If you use the Delicious social bookmarking service then you can configure Taggtool to integrate with it.

With integration enabled you will be able to run searches against your website bookmarks in the same way that you can with files.

You can also update your Delicious bookmarks, tags and descriptions via Taggtool.

If you do not have a Delicious account you can open one for free at <http://www.delicious.com>

Configuring Delicious Integration

Launch Taggtool's Option dialog by clicking on the 'Options' button in the toolbar.

Select the 'Delicious' tab page towards the top of the dialog.

Enter your Delicious user name and password in the fields provided.

If you access the internet via a proxy server you can enter the host and port information into the fields labelled proxy.

If you don't know what that means then leave these fields blank.

Tick the 'Enable Delicious integration' checkbox.

You now need to restart Taggtool to complete the process.

How do I stop and start Taggtool

To stop Taggtool you need to right-click on the small tag icon in the tasktray located towards the bottom right of screen, select 'Exit' from the popup menu which appears.

To start Taggtool, you can select it from the Start Menu -> All Programs -> Taggtool -> Tagg -> Taggtool or double click the Taggtool icon on the desktop.

The search widget

Whenever the Taggtool application is minimized or closed a small widget will appear on your desktop which can be used to perform searches without having to restore the application.

The search widget works in a similar way to the regular search panel, you simply enter your search terms into the text field and hit enter. The results of the search will be displayed in a panel attached to the widget.

The file tagging widget

As well as performing searches from your desktop it is also possible to add tags, descriptions and ratings to files using Windows file explorer.

To tag up a file(s), navigate to the file you wish to tag using the file explorer then right click on the file and select 'Add Tags' from the pop-up menu.

A small metadata panel will appear, use this window to enter your tags as well as any other metadata such as aliases, descriptions and ratings. Click save to commit your changes into the current database.

Fresh Files

The fresh files panel lists any new files created on your system in real-time, for example if you create a Word document a new entry will appear in the fresh files list. You can then tag up this file if required.

Due to the nature of operating systems many files are created by the system and applications which you may not be interested in so to avoid having long lists of you can filter out certain folders and file extensions.

To create a filter, select a file in the fresh files grid then right click to bring up the popup menu. From this menu you can choose to filter out all files by the file extension or you can choose to filter out all files by folder. By default, any nested folders which appear inside the selected folder will also be filtered out.

For example: A filter applied to `c:\programs\data` will also include `c:\programs\data\temp`

If at any time you wish to remove any filters then you can do so via the Fresh Files tab page in the Options dialog which is accessible from the main toolbar or main menu.

Rules

In addition to simply displaying fresh files, you can also create rules to automatically tag these files if they meet certain conditions.

For example, you could create a rule to automatically tag Microsoft Office documents with 'my-office' if they have been created inside the 'My Documents' folder.

At a later date you could then run a search for 'my-office' and add more descriptive tags if required. Adding rules is a powerful way of staying organized and reduces the amount of manual tagging you would otherwise have to do.

To create a new rule, click on the 'New Rule' button. In the rule dialog which appears, select which types of files you wish to process, i.e. *.doc for word files or *.* if you want the rule to be run against all file types.

Some common file types can be selected from the combobox next to the file extension filter, these cover various file types such as MS Office, Sound files, Image files etc.

The next step is to select which folder you wish the rule to be applied against, you can control whether or not to include sub folders by placing a tick in the checkbox.

Finally you can choose whether or not to enable the rule right now or disable it for future use.

Click 'ok' to save the rule.

If at any time you wish to modify a rule, simply double click the rule to display the rule dialog.

To delete a rule, click the 'delete' button.

Recently Opened Files

The 'Recently Opened' panel lists all files opened via the Taggtool application. The purpose is to shortcut the traditional method of first searching for a file, then opening. If you know that you recently looked at a file then you can by-pass the search by looking at the recently opened file list.

Files are listed in reverse chronological order hence the most recent file is placed at the top.

To re-open a file, simply double click the file you require.

What is the server edition?

The Taggtool server edition provides a way for multiple users to share and tag files in the same database at the same time.

The typical scenario is that you have 1 Taggtool server edition installed which multiple users can connect to via computers running the Taggtool Desktop Edition.

This makes it possible for multiple users to share the same database and view each others tags in realtime.

This collaborative approach to file management makes it a breeze for small teams to tag and share files on network shares or NAS devices.

By default databases created via the server edition are configured as 'shared' databases meaning that users are restricted from only tagging files and folders which all users can see i.e. Network folder shares.

After installing and running Taggtool server edition it is necessary to make sure that any firewalls present are configured to allow network traffic over port 1527.

Connecting to a Taggtool server

To connect to a Taggtool server, the server name and port number are needed. This information can be found by opening the About box (Help menu -> About) on the computer running Taggtool server edition.

To connect to the server, select 'Taggtool Server' -> 'Connect to server' from the main menu. This will launch a connection dialog into which you will need to enter the server name and port number.

If you want Taggtool to automatically connect to the server when it startups then click on the reconnect checkbox.

Finally, click 'ok' to connect to the server.

If at anytime you wish to disconnect from the server, click 'Taggtool Server' -> Disconnect from the main menu.

When disconnected, you are switched back to your local database.