

# Tags

## Tracking with tags

To view the tags associated with the selected item either click the Meta button in the inspector bar, or see the Meta tab in the Inspector shelf.

### Tags

Tags are words or phrases that you can define and associate with your items as searchable meta information. A tag can be local to a particular project, and used perhaps like a handy keyword, or it can be a global tag set available for use within all of your projects.

For instance, if you have a project for a research paper, then you may use local project tags to quickly tag and find documents, notes, and images you bring into your Curio project.

On the other hand, you may create a tag set titled “Tasks” containing tags such as “Possible”, “On Hold”, “Started”, “Working On”, and “Completed”, that you use to tag items in all of your projects. Then you can use the Status shelf to quickly search across all of your projects to see what figures are “On Hold”, for example.

### Sharing Global Tags with Others via Extracted Tags

On a related note, if you share a project you created with others then obviously those users would have access to the local tags, but what about your global tags?

Fortunately, Curio will embed an “extract” of any global tag sets you have referenced in the project so your colleagues will see those same tag associations. When they view the Meta inspector on their Macs those extracted tag sets will be available but grayed out to indicate they cannot delete or otherwise modify those tag sets. However, they can change tag associations from that set — for example, they can change a figure from “On Hold” to “Working On”.

### Assign Tags via Typing with Tag Name Completion

You can associate tags with the selected items simply by typing the tag name. A completion list will appear as you type so you can choose an existing tag, or you can continue typing and press the Return key to create an on-the-fly local project tag.

### Assign Tags via Hierarchical List or Image

You can also associate tags using the tags hierarchical list or click the button to turn it into a handy matrix showing only those tags with images.

### Working with Tag Sets and Tags

Use the gear button and tag properties at the bottom of the inspector to modify or create new tag sets and tags. These tags can either be local to your project or global and available across projects and for grouping purposes in the Status shelf.

- Create a new tag set or tag in the current tag set using the gear button.
- Tag sets and tags within a tag set can be arranged in a specific ordering, or you can use gear button to sort them.
- Change a tag name by double-clicking it.
- To delete a tag, select it and press the Delete key.
- Use the gear button to sort the tag sets and tags within the current set. You can also import an extracted tag set from a foreign project into your own shareable global tag sets. For instance, from the example above, if you’re viewing a colleague’s project with that “Tasks” extracted tag set then you can select it and use the gear button to import it into your own global tag sets. All internal identifiers are kept the same so you can continue to share projects with your colleagues that use that same tag set.
- Click the ‘Click to Record’ field to record a keyboard shortcut to quickly apply certain tags to figures. All shortcuts must include Control-Shift to avoid conflicts with existing Curio shortcuts.
- Assign an emoji or character symbol to a tag by clicking in the emoji field and pressing Control-Command-Space to bring up the standard macOS Character Viewer. Double-click on an emoji or text symbol and instantly it will be entered as the “image” for the tag. Emoji are great because they’re perfectly scalable and consume very little disk space for the project. If you choose a text symbol then use the little color well next to the emoji field to specify a tinting color for the symbol. This way you can turn a boring black down arrow symbol into a noticeable red down arrow.
- Alternatively you can drag in or paste an actual image into the tag’s image well. As a note, you can drag multiple images (icns, png, or jpg) from the Finder into the tags panel to add lots of image tags to an existing tag set, where their tag names are derived from their file names. Download perfect tag images from sites like IconFinder or search SmashingBuzz or Google for icon sets for more recommendations.
- When a tag has an image (emoji or actual) then it is displayed as an adornment next to the figure’s other adornments. Use the adornment size slider to change its size.

### One Tag Active

When a tag set is selected, note the ‘only one tag in the tag set can be active’ checkbox. Checking this option is perfect for those tag sets which represent a specific state or status. Choosing a tag in this set will automatically turn off the previously associated tag from this set.

For example, with the Detailed Tasks tag set you are specifying a GTD-style state for that task like pending, active, or done. If the current state of a figure is active then setting a tag of done will automatically turn off active.

These types of tag sets have a couple of extra ways to assign tags to a figure:

- If your tag set has 3 or fewer tags with images then clicking the tag’s image adornment will cycle through the tags in the set.
- If your tag set has more than 3 tags, then clicking the tag’s image adornment reveals a popup so you can quickly choose the new tag.

### Assign Figure Tags via Context Menu

Right-click on a figure and choose a tag from the context menu that appears to toggle the tag association.

### Assign Figure Tags via Mini Popover

Curio has a handy mini popover for setting tags which can be handy when you don’t want to bring up the inspector.

To show the tags mini popover: Option-click an existing tag adornment, or press the Comma key when a figure is selected. As a hint to remember this keyboard shortcut, think of a comma-separated list of tags.

When the mini popover appears type in a tag name. A completion list will appear as you type to help you choose an existing tag if you wish.

To hide the popover press the Escape key, or click its little close button