Tags: adding, removing, and filtering by tags for packages, providers, and titles

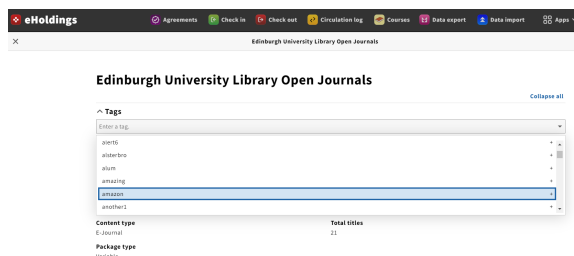## Add a tag to a package

Preconditions

- Minimum permissions assigned: eHoldings: Can edit providers, packages, titles detail records and Tags: All permissions

Steps

1. Go to eHoldings app
2. Search for and select a package.
   a. Using the Search & filter search bar with the Packages toggle selected. Click on your chosen package to select it.
3. Open the Tags accordion at the top of the record, if it's not already open.
4. Either select a tag(s) from the dropdown menu...
   a. It will appear in the Tags bar.
5. Or type a new tag into the Tags bar. Then click "Add tag for:..."

Expected Result

Tags are saved to the package

Remove a tag from a package

Preconditions

- Minimum permissions assigned: eHoldings: Can edit providers, packages, titles detail records and Tags: All permissions
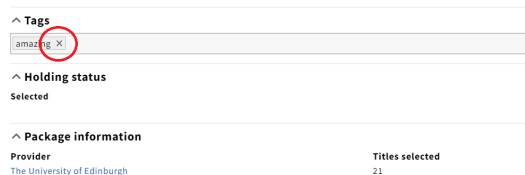
Steps

1. Go to the eHoldings app.
2. Click on the packages toggle.
3. Filter packages by one or more tags: Check the "Search by tags only" box, then select a tag(s) from the dropdown menu.
4. Choose any package returned by clicking on that package record.
5. Remove a tag by clicking the "X" next to the tag's name.

Expected Result

Tag is removed from a package

Filter package results by a tag

Steps

1. Go to the eHoldings app.
2. Go to the "Packages" tab.
3. Click the checkbox next to "Search by tags only" in the tags accordion.
4. Select tag from the dropdown menu.

Expected Result

Packages with that tag will be returned in the righthand pane.

⚠️ You can add, remove, and filter tags with **Provider** records by following the exact same steps as for packages. Just be sure to have the Providers toggle selected in the Search & filter pane.

Add a tag to a title / delete a tag

1. In the eHoldings app, search for and select a title.
   a. Click on the Titles toggle.
   b. Search within the search bar in the Search & filter pane.
   c. Click on the chosen title record to open it up.
2. Under the packages accordion in the title record, choose a package by clicking on it.
3. From here you can add tags to, and delete tags from, a title within a package following the same steps as adding/deleting tags to/from a package (see above).

✅ To add/delete tags to/from a title, you must access that title from within a package.

- To **filter** by tags for titles, follow the same steps as filtering by tags for packages (see above), but be sure the Titles toggle is selected in the Search & filter pane.