Learn how to add a tag to a request, edit a tag, and delete a tag in Tipasa. Tags are custom labels that can be applied to active and closed requests. Your library can use tags as a way to group and keep track of requests. For example, enter a tag such as "Invoice" to keep track of borrowing libraries and patrons to whom you have sent invoices. Use the tag to retrieve these requests and follow up with the borrower when needed.

Tags are only visible to your library. The system maintains all tags created and saved to a request, and you can search for active and closed requests using tags. You can create up to 200 unique tags.

Add a tag to a request

You can create new tags by adding and saving them to a request, or you can add existing tags to a request.

Note: You can only create up to 200 unique tags.

To create a new tag and add it to a request:

https://help.oclc.org/Resource_Sharing/Tipasa/Tags/Manage_Tags

Printed: Tue, 20 Sep 2022 18:09:44 GMT
1. Open the request you want to tag.
2. In the Request Details, in the Request Tags field, enter one or more **new tags**.
3. Click the **text in the list** or press <Enter> to add the tag to the request.
4. Click **Save**.

To add an existing tag to a request:

1. Open the request you want to tag.
2. In the Request Details, in the Request Tags field, type the **tag** into the field or select the **tag** from the list. If you type into the field to find the tag, the system will match your text to the first characters of the tag.
3. Click the **text in the list** or press <Enter> to add the tag to the request.
4. Click **Save**.

**Automatically tag new borrowing requests:**

Add request tags to main automations to automatically apply tags to requests that match specific criteria. See [Automated Request Manager](https://help.oclc.org/Resource_Sharing/Tipasa/Tags/Manage_Tags) for more information about automations.

1. From the Automated Request Manager section of the WorldShare ILL module of the OCLC Service Configuration:
2. Click + **Add New** to create a new automation or select the **Edit** button associated with an existing automation.
   - For new automations, enter a **Name** and assign a **Priority**. See [Main Automation fields](https://help.oclc.org/Resource_Sharing/Tipasa/Tags/Manage_Tags) for more information.
3. Select any desired match criteria from the **Matches** drop-down menu. See [Automation Match criteria](https://help.oclc.org/Resource_Sharing/Tipasa/Tags/Manage_Tags) for more information.
   - If you do not select a match criteria, the automation will apply to all requests.
   - Click the **Add a match** button to configure additional match criteria.
4. From the **Action** drop-down, select **Add Request Tags**.
5. Enter the desired tag(s) to be applied to requests matching the specified criteria.
6. Click **Save**.
Edit or Delete a tag

Edit a tag

You can edit active tags. If you made a mistake and need to change the name of the tag, you can edit it on the Tipasa Home.

**Note:** Before you edit a tag, you should refresh the tag list to make sure the list is current. You will receive an error if you are not working from the most up to date version of the tag list.

**To edit a tag:**

1. On the Tipasa Home, click the **All Tags** accordion.
2. Click **Refresh List** to make sure the tags list is displaying the most current version.
3. Locate the **tag** you want to edit. You can search for the tag in the Find a tag search box, or find the tag in the list.
4. Click the **pencil icon** next to the tag you want to edit.
5. Click **Edit**.
6. In the tag field, edit the tag. If you are renaming the tag, you can only use a phrase that has not been used yet.
7. Click **Submit**.
8. The tag is updated and sorted in the tag list in alphabetical order.

Delete a tag

You can delete active tags and tags that are no longer associated with any active requests. You may want to delete a tag if you no longer use it.

**When you delete a tag:**
• It is removed from all requests.
• It is removed from the tags list under the All Tags accordion.
• It does not appear as a suggestion when you add a tag to a request.

Note: Before you delete a tag, you should refresh the tag list to make sure the list is current. You will receive an error if you are not working from the most up to date version of the tag list.

To delete a tag:

1. On the Tipasa Home, click the All Tags accordion.
2. Click Refresh List to make sure the tags list is displaying the most current tags.
3. Locate the tag you want to delete. You can search for the tag in the Find a tag search box, or find the tag in the list.
4. Click the pencil icon next to the tag you want to delete.
5. Click Delete.
6. On the Delete Tag window, click Delete.
7. The tag is deleted and removed from the tag list.

Frequently used tags

The Frequently Used Tags sections displays on the Tipasa Home and shows the top twenty tags, based on the number of active requests using the tag. If there are less than twenty distinct tags on active requests, fewer than twenty tags will appear in this section. The All Tags accordion shows all tags that have ever been used, including tags that appear on closed requests. Click on a tag to view all active requests with that tag.