



(Old) Fund Tags

Fund tags are a way of pulling funds together to create reports on groups of related funds.

Tags can be based on departments, material types, people who are responsible for the fund, or anything by which you might want to group funds together.

Funds can be assigned multiple tags.

Adding a Fund Tag

1. Go to Admin/Acquisitions Administration/Fund Tags
2. Click on New Fund Tag
3. Select the Fund Tag Owner from the drop down
4. Enter the Fund Tag Name
5. Click Save

Filtering the Fund Tag List

Select the Fund Tag Owner from the drop down. Check off Ancestors or Descendants limit to tags owned at the system level or branch level.

For example, if you have created tags for the system BEVERLY, as well as tags for BEV, BEB, and BEF, and you want to see all of them, select BEVERLY as the Fund Tag Owner and check off Descendants.

Fund Tag Configuration

Fund Tag Owner: + Ancestors + Descendants

<input type="checkbox"/>	#	<u>Fund Tag ID</u>	<u>Fund Tag Owner</u>	<u>Fund Tag Name</u>
<input type="checkbox"/>	1	169	BEVERLY	fiction
<input type="checkbox"/>	2	171	BEF	farms
<input type="checkbox"/>	3	172	BEV	main
<input type="checkbox"/>	4	170	BEB	bookmobile

To see tags for BEF and BEVERLY, set the Fund Tag Owner to BEF and check off Ancestors.

Fund Tag Configuration

Fund Tag Owner: + Ancestors + Descendants

<input type="checkbox"/>	#	<u>Fund Tag ID</u>	<u>Fund Tag Owner</u>	<u>Fund Tag Name</u>
<input type="checkbox"/>	1	169	BEVERLY	fiction
<input type="checkbox"/>	2	171	BEF	farms

To see tags for just BEF, set the Fund Tag Owner to the BEF and leave Ancestors and Descendants unchecked.

Fund Tag Configuration

Fund Tag Owner: + Ancestors + Descendants

<input type="checkbox"/>	#	<u>Fund Tag ID</u>	<u>Fund Tag Owner</u>	<u>Fund Tag Name</u>
<input type="checkbox"/>	1	171	BEF	farms

Editing a Fund Tag

1. Double click on the tag you want to change.
2. Make any changes
3. Click Save

Deleting a Fund Tag

1. Check the box on the left of the tag you want to remove

2. Click on  and then Deleted Selected