Define Tags

This How-To-Guide describes the use and purpose of Tags along with how to create them within KSA. Tags are additional attributes that are associated with individual transaction types, both charge and payment types, to give further information about the transaction. They are user defined in the Tags Table and enable the user to later group or select transactions that carry a specific tag for inclusion in additional processing. Some transaction types may not have a need for a tag, however, others may carry one or more tags. For example: a cash payment transaction type might have the tag; CASH for later inclusion in the Form 8300 reporting, or a Title IV payment transaction type might have a tag FINAID for use with Payment Application rules. Some Tags are indicated as being Administrative Tags, when this indicator is set, a regular user would not be able to assign or remove the tag from a transaction or transaction type. The Administrative Tag indicator would be used for tags such as 1098T or the FINAID, where you would typically never want to remove the tag from a transaction.

This guide covers the following topics:

Terminology

The page KS Glossary of Terms Template could not be found.

How-To Steps

The following outlines the steps for adding Tags and their purpose in KSA .

Once you have signed into KSA and have the appropriate permissions, select the Settings tab from the top navigation tabs, then select Tags from the Navigation on the left side.   The currently added tags are displayed.

Add a New Tag

Tags are added to transaction types to add additional criteria regarding that tag that can be used for additional selection and processing.

In the initial view of Tags, a new Tag can be easily entered by filling in the blank elements at the top of the Tag Summary screen. Enter a unique Tag Symbol or Code (up to 45 characters), the Name (up to 100 characters), Description (up to 2000 characters) and check the Administrative Tag box if it is to be set as an Administrative Tag. Administrative Tags require a higher permission level to add or be removed from a Transaction Type of Transaction. Select the Add button to the far right to insert the new tag into the database. Upon saving, a unique Tag ID is assigned to the Tag Code. Here again, a message will be displayed at the top to indicate whether or not the Tag was inserted successfully.   Scrolling thru the Tags listed the newly added tag should be displayed and is now eligible for editing.

<Add introduction>

Screen Caption/Title (Using Subscript)

Edit an Existing Tag

When a user wishes to Edit an existing Tag to be used with transaction types, navigate to Settings/Tags.

From the initial display of Tags, a user with appropriate permission can modify or Edit an existing Tag by selecting the Edit button to the far right of the Tag to be edited. The Tag dialog box is opened for editing. This dialog box allows modification to the Tag's Name, Description and the Administrative Tag check box. Once the desired modifications are complete select the Submit button at the bottom and the changes will be saved to the database. A message is presented to the user at the top to signify whether or not the change was successful or if there were any errors. If everything is complete, select the Tag Summary link at the top to navigate back to the Tag Summary listing.

Reference Documentation

- Add and link some reference, such as a related Technical Guide
- Add and link another reference, such as a related How-To-Guide

Internal Resources

- Add and link an internal reference, such as a Google Doc
- Add and link another internal reference, such as a user story or requirement
- Add and link another internal reference, such as a milestone demo