Guide to the OLE System Administration Module

Table of Contents

Introduction

This guide provides information about using OLE system administration functions available via the user interface. Users with proper authorization are able to perform powerful functions that affect the entire system. These functions, which are accessible via the **Admin** menu tab, allow you to:

- Support the Kuali Identity Management (KIM) module and implement security based on accounting line attributes
- Define basic types of location and reference information
- Control the running of batch jobs
- Support the Kuali Enterprise Workflow (KEW) module and
- Enable authorized users to perform a variety of other functional and technical activities.

Note

Only members of OLE-SYS Manager and KR-SYS Technical Administrator roles may initiate most documents in the Admin Menu. Other users may look up values from the lookup screens but may not be able to access other options at all.

This guide is organized to follow the layout of the Admin tab. Please note that some submenus are not covered in this guide.

- System provides access to KIM identy (roles and permissions) and locations, as well as identy management references (maintenance documents associated with KIM identities).
- Location provides access to creating and maintaining locations and location levels for the maintenance of library records.
- Batch allows users to upload files used by various OLE batch jobs, run batch jobs and see files generated by those jobs for Financial Processing, General Ledger, and System processes.
- Batch Framework submenu allows users to perform a variety of functional and technical activities that process cataloging records in batch.
- Kuali OLE Modules submenu allows you to perform a variety of functional and technical activities that affect the entire system. This includes uploading XML and People Flow rules to modify workflows. Users may also access the Staff Upload interface.
- KRMS Rules provides access to agendas, context, attribution, term and category lookups.
- Global Configuration Settings provide access to administering export and global import services.
- Configuration provides access to high level configuration options. Users may modify workflows and parameters for OLE.
- Monitoring provides access to the Kuali Service Bus and additional workflow documentation.

These sections are divided into subsections covering individual functions in the menu grouping. For each function, the applicable subsection presents a breadcrumb trail showing you how to access the function, information about the layout of and fields on the applicable screen(s), and where appropriate, additional information to help you use the screen(s).

Note

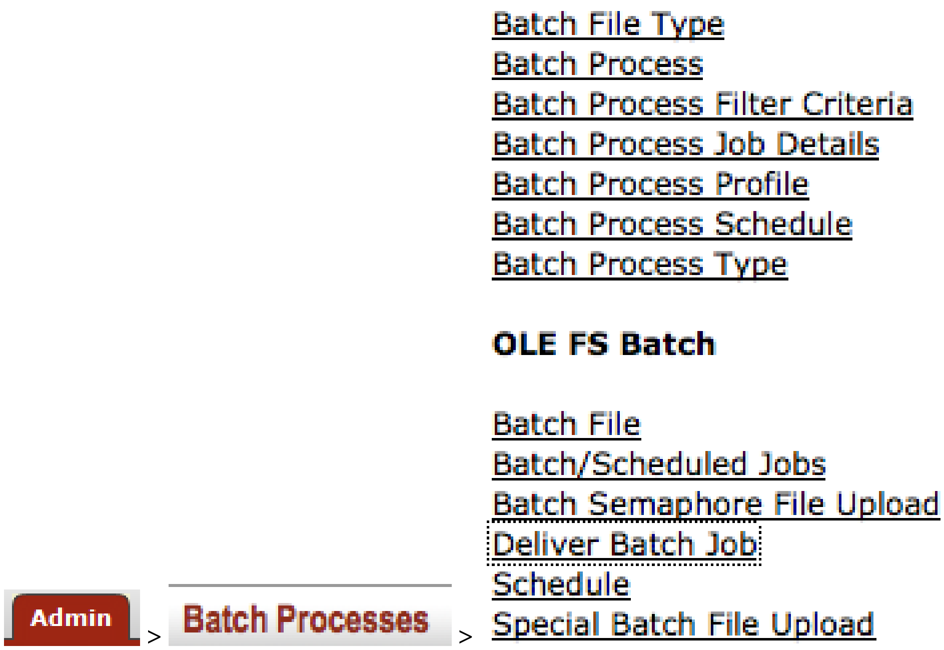
In order to work efficiently, you need to understand the basics of the OLE's user interface. For information and instructions about logging on and off, navigating, understanding the components of screens, and performing basic operations in the screens, see the OLE Basic Functionality and Key Concepts.

This guide as well as guides to other OLE modules are available for download from the OLE Documentation Portal.

Tip

Bookmark any page within OLE. This will allow you to easily navigate back to an interface or e-doc in one click, just log in.

Chapter 1. Batch Processes Administrative Documents



The Batch Framework submenu allows you to perform a variety of functional and technical activities that process cataloging records in batch.

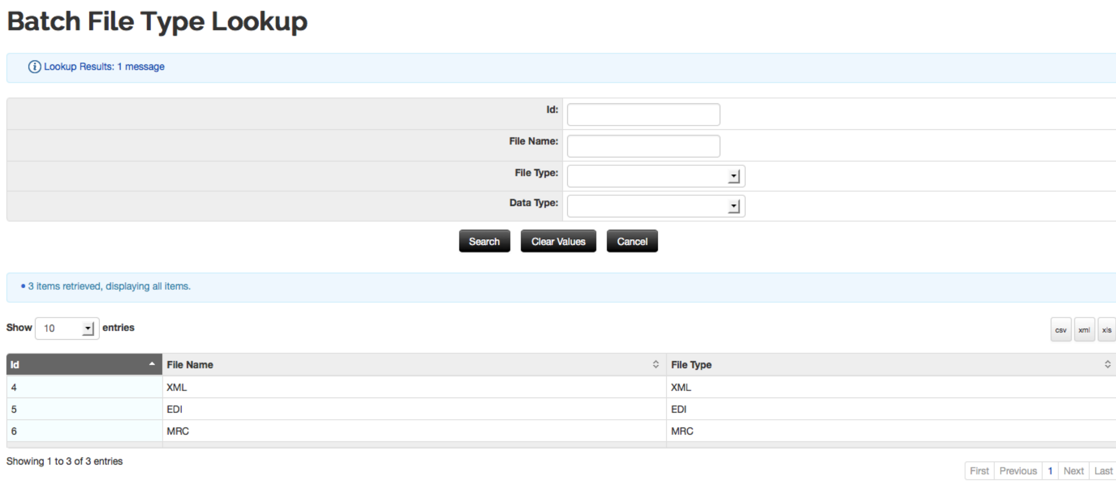
The top section of the **Batch Processes** submenu allows users to manage importing of order records, invoices, patrons, bibliographic records, locations, and serial records. It also allows users to batch export and batch delete records and manages the claim reports. The OLE FS Batch section controls many of the batch processes that occur for financial processes and OLE workflows. It also includes the **Deliver Batch Job** which creates notices for patrons.

Batch File Type

The **Batch File Type** is a maintenance document used to support batch process profile.

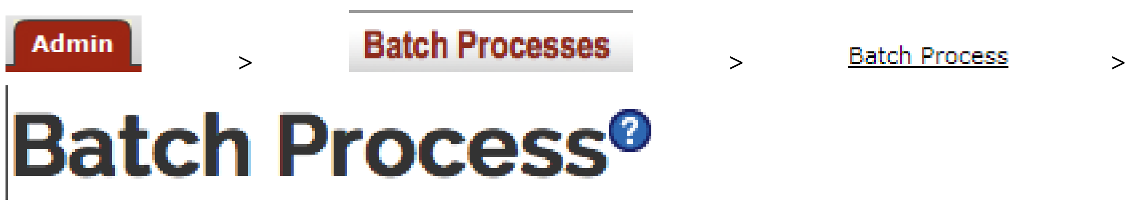
Note

Batch File Types cannot be edited via the interface. Technical assistance is required to add new or edit existing batch file types.



As a function of OLE, you may search for batch file types. Execute a blank search to review the available batch file types.

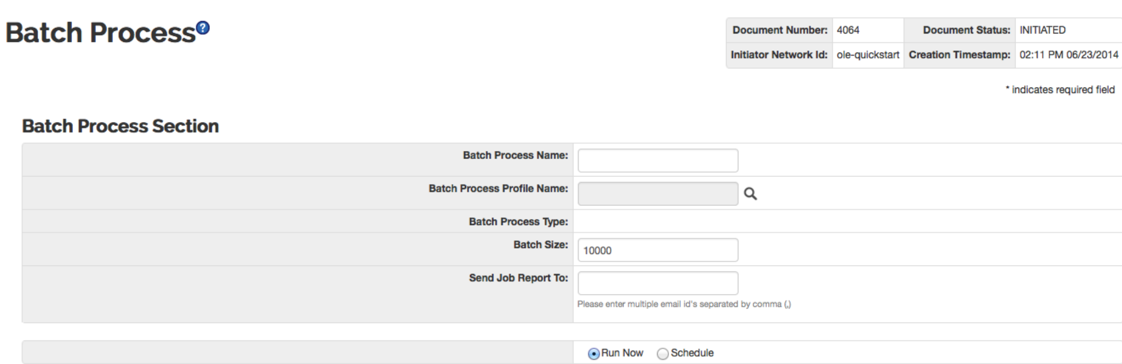
Batch Process



The **Batch Process** interface, available from the **Admin** menu, allows staff to run import and export jobs via the OLE user interface. Once the job has run, staff may receive notifications of completion, view reports and, for importing, make changes to records as necessary.

Process Overview

Open the **Batch Process** interface from the **Admin** tab.



1. Enter a name to distinguish your batch process. This field is not required but it will be helpful to identify the batch process. If left blank, the profile name chosen and a number is used by OLE.

2. Choose the **Batch Process Profile**. You must search for it from the lookup .

3. Modify the **batch size** if necessary. This is the number of records to import or export per batch.

   - For example, if you are exporting a database of seven million records, you might specify a batch size of one million and OLE will process the output in batches of one million.

   - However if you are importing records and you specify a lesser number of records to import than what exists in your file, the Batch Process will only import the specified number of records and not the full amount in your file.

4. If you wish to receive the batch process job report via email, enter your email in **Send Job Report To**.

   If you do not want to receive email notifications, you may also check the listing of job outputs from the **Batch Process Job Details** interface (see below).

5. Depending on the **Batch Process Type** (auto-populated when the **Batch Process Profile Name** is selected), an **Input Section** or an **Output Section** will appear.

   - **Output Section** is made available for exporting records types. Select the **Output Format** (MARC or MARCXML) from the drop down.

     Enter the **Output File Name**, a name given to the file.

     ### Note

     A note on naming the Output File:

     - If a "Batch Process Name" is specified, and no "Output File Name" is specified, the batch process name is used for the filename.

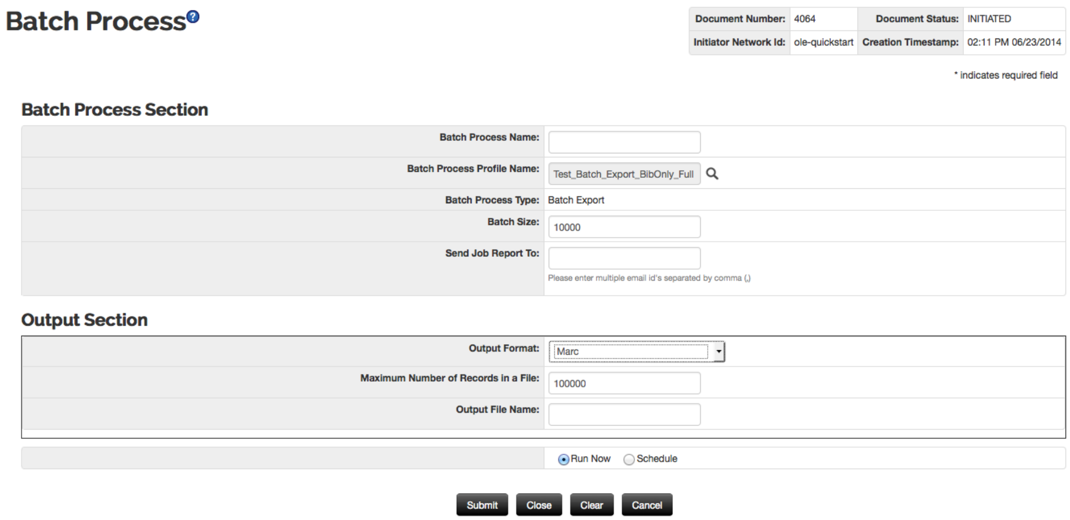
     - If an "Output File Name" is specified, and no "Batch Process Name" is given, the "Output File Field" is used for the filename.

     - If a "Batch Process Name" is specified, and a filename is given in the "Output File Name" field, the "Output File Name" field is used to generate the filename.

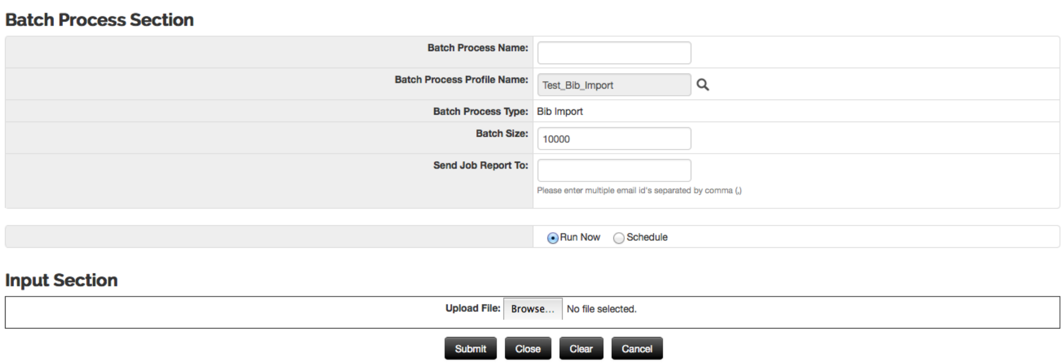
     - If a file name containing a space is entered in either the "Output File Name" field or the "Batch Process Name" field on the Batch Process screen, although the file will appear normal in the directory display (accessed from Batch Process Job Details > View Job Report > View Export Path), the link to download the file will break off the filename at the first space, with no extension.

       This is a known bug to be fixed in a future release. See OLE-6603.

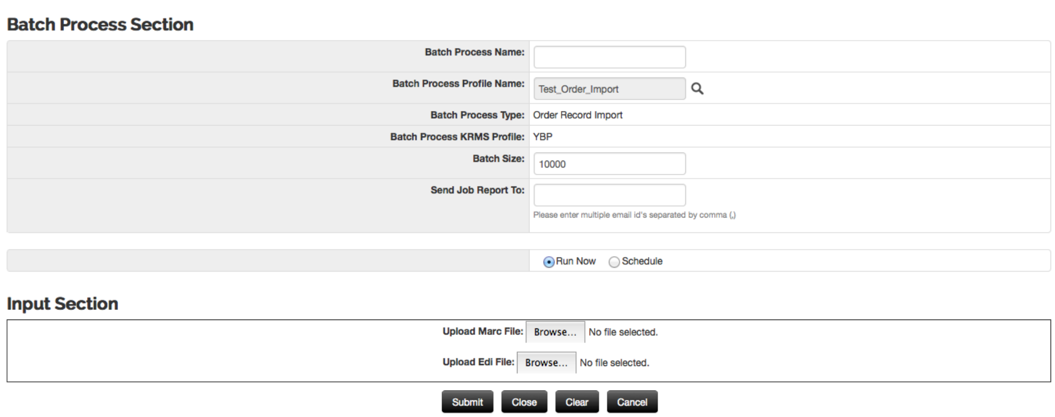
     Exported file location will be: export/[batch_process_profile or user_specified_location]/[job_name or job [batch_id]]- [start timestamp] [-part#]. [extension]

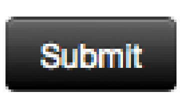


- **Input Section** is made available for most importing record types. Select **Browse...** (or **Choose File** depending on your browser) to search for the file from your local machine.



- **Input Section for Order Records** requires you to choose both a **MARC** and **EDE** file, unless the Order Import Profile you chose is marked "MARC only".



6. Select **Run Now** and click  to begin the job immediately.

Alternatively, you may select **Schedule** to schedule the job (see instructions below).

7. To review completed batch jobs, review the report, or restart the job see **Batch Process Job Details**.

Note

For additional information on **Batch Process Job Details**, see Batch Process Job Details

To Review jobs that are scheduled, reschedule or remove the job from OLE, see **Batch Process Job Schedule**.

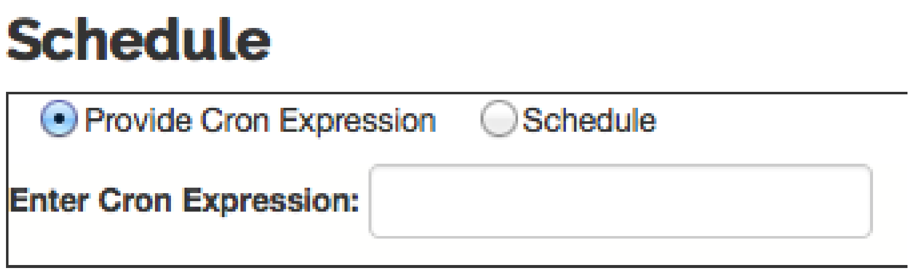
Note

For additional information on **Batch Process Job Schedule**, see Batch Process Job Schedule

Scheduling a Batch Process

If you select **schedule** to schedule the **Batch Process** job, an additional tab will appear to assist in the scheduling process.

- You may choose to schedule by Cron Expression. Select the radio button next to **Cron Expression** and enter the expression in the available text box. For example, "0 0 * * * ?" will export data hourly.

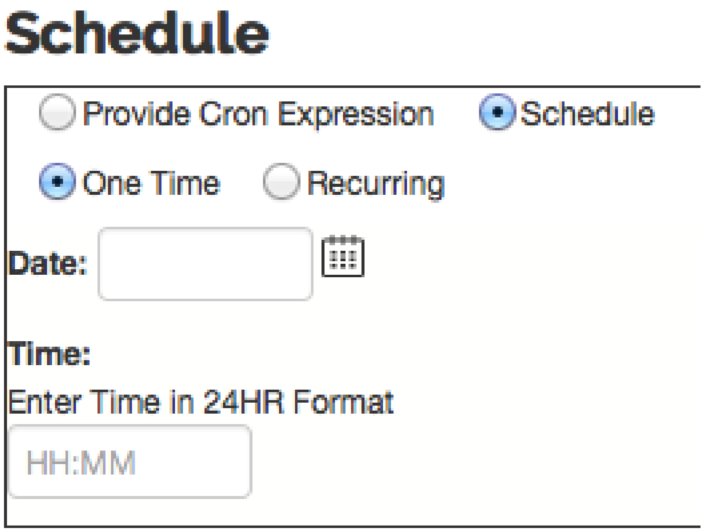


Note

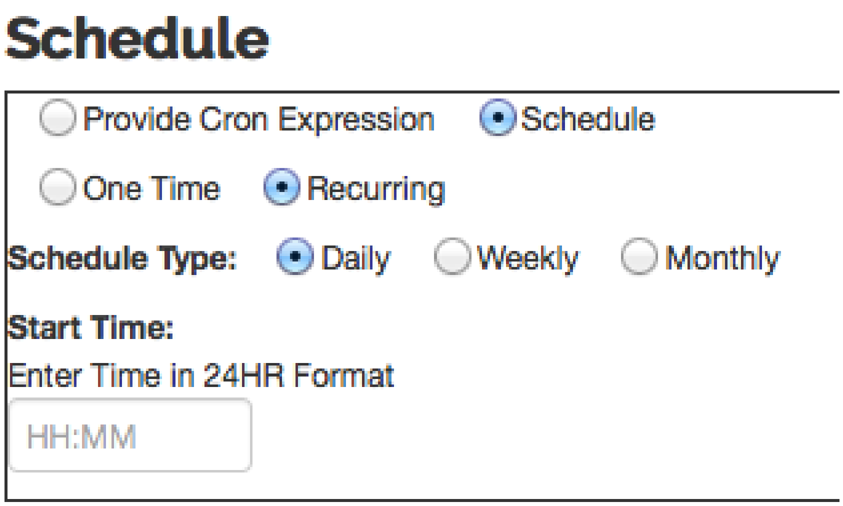
For more information about Cron expressions in OLE, see Job Cron Expression - controlling the frequency/schedule of job execution.

- You may also choose the radio button **Schedule** to manually enter when the job should occur. You will have two options:

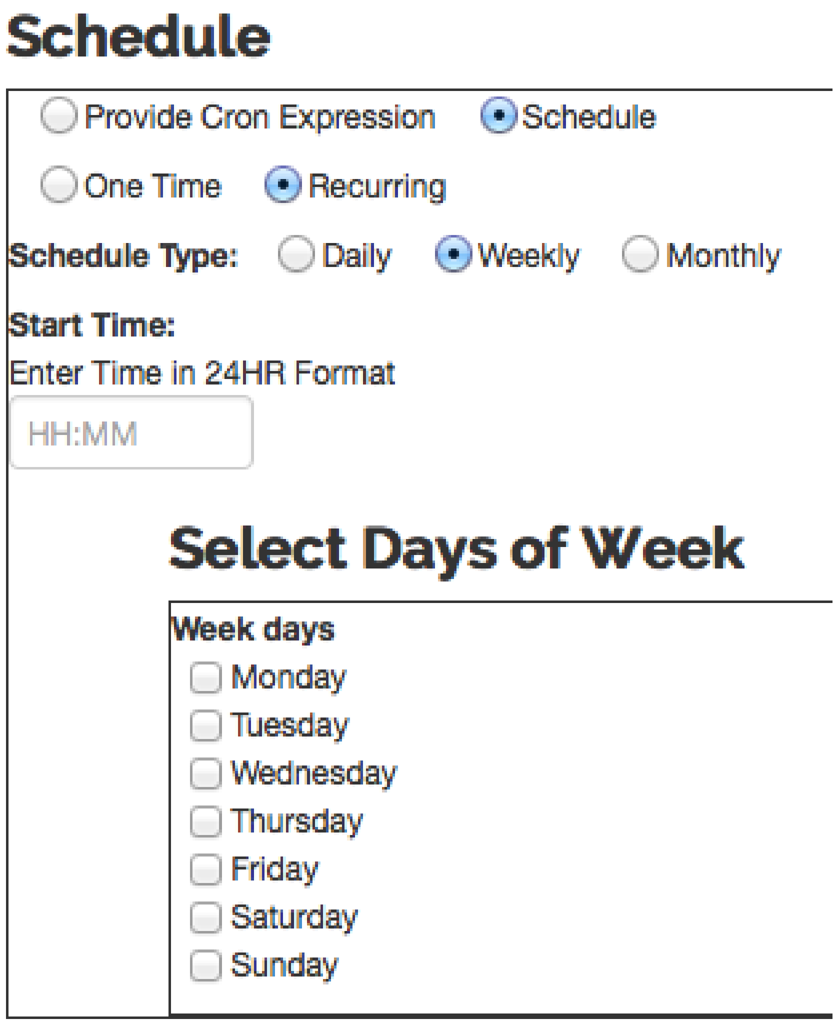
  - **One Time**: Enter the date or search for it from the calendar icon and time for the job to begin.



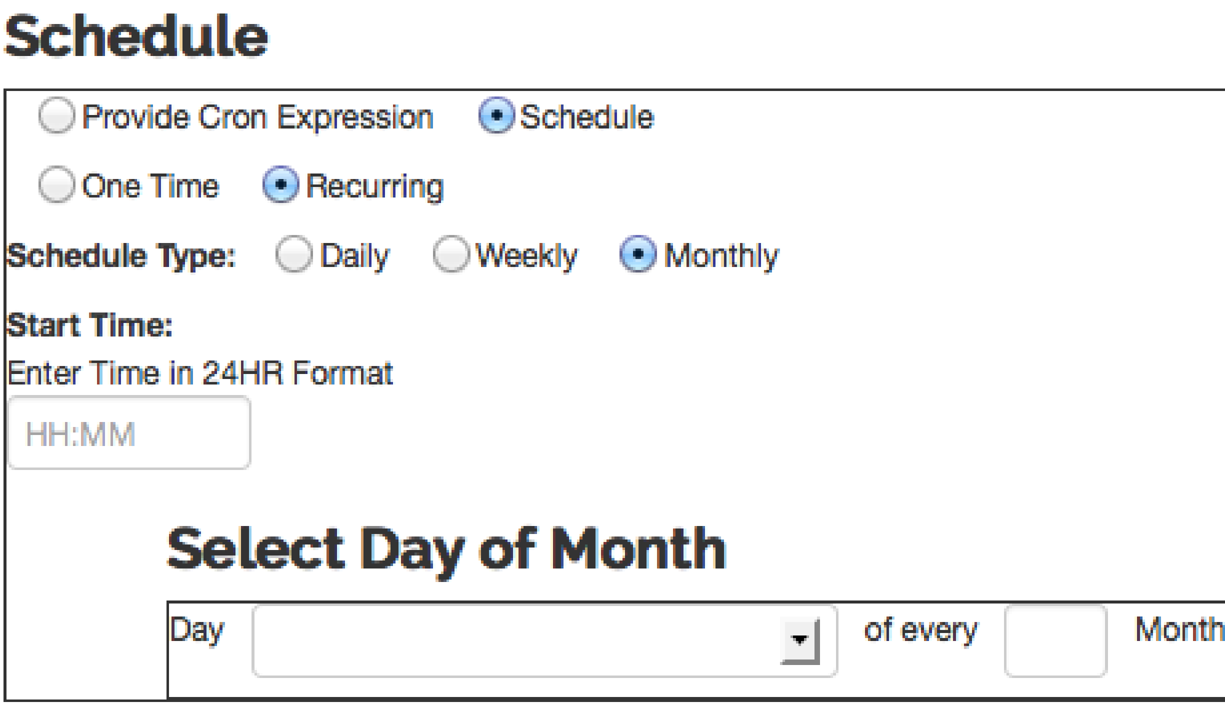
- **Recurring**: Select the schedule type Daily, Weekly or Monthly.
  - If you selected the Schedule Type **Daily**, enter the time for the job to begin.



  - If you selected the Schedule Type **Weekly**, enter the time for the job to begin and check the box for the days of the week that the job should run.



- If you selected the Schedule Type **Monthly**, enter the time for the job to begin, select the calendar date (for example, 23 for the 23rd day of each month), and enter the number of months that should elapse before the job runs again (for example, you may set the job to run every 3 or 6 months).



Once your schedule has been determined, click 

.

To see the details of the batch process, including the percent completed and the job report, go to the Batch Process Job Details.

Note

For more information about Batch Process Job Details, see the section below.

Scheduling a full dump of the database then incremental exports

First, create the full batch export profile and run the batch process job.

1. Search for the **batch process profile name** that will export full records.

   ### Note

   To make a batch process profile, see below.

2. Adjust the **batch size** as needed.

3. Select the **output format**.

4. Enter a file name in the **Output filename**.

5. Verify that the radio button **Run Now** is chosen.

6. Click **Submit** to run the full dump.

Next, create the incremental and schedule it to run daily at preferred time.

1. Search for the **batch process profile name** that will export incremental records. A separate profile is needed for this.

   ### Note

   To make a batch process profile, see below.

2. Adjust the **batch size** as needed.
3. Select the **output format**.
4. Enter a file name in the **Output filename**.
5. Select the radio button **Schedule** and schedule the preferred time. The job will pick up changes that exist since the job's creation.

   ### Note

   For more information about scheduling a job, see the Scheduling a Batch Process section above.

6. Click **Submit** to start the schedule.

Scheduling a full dump followed by daily incrementals

To schedule a full dump and then have daily incrementals, create two separate profiles - one for the full dump and one for the incremental. Using the created profiles, run the full export immediately followed by the scheduled incremental export. Schedule the incremental export to run after 'x' amount of time (6pm every evening for example). The first incremental export will be useless. However after the incremental runs the second time and after every 'x' amount of time following, it will export the records changed from the time it was scheduled.

Business Rules

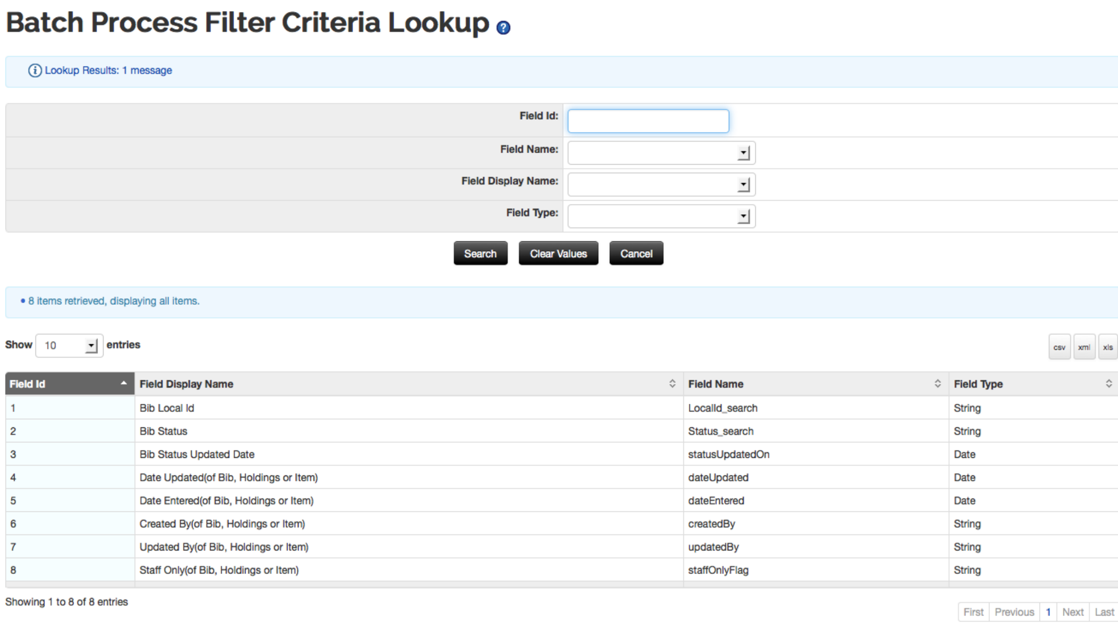
- If items are created through Batch Process (in BIB MARC XML format), there is no limit to the amount of records that can be imported at one time but the code may fail if too many item records are to be created for a single bibliographic record.

Batch Process Filter Criteria

The **Batch Process Filter Criteria** is a maintenance document used to support exporting bibliographic records. Filter Criteria can be selected from the batch process profile to narrow down which records will be exported when the profile is used.

Note

Batch Process Filter Criteria cannot be edited via the interface. Technical assistance is required to add new or edit existing batch process filter criteria.

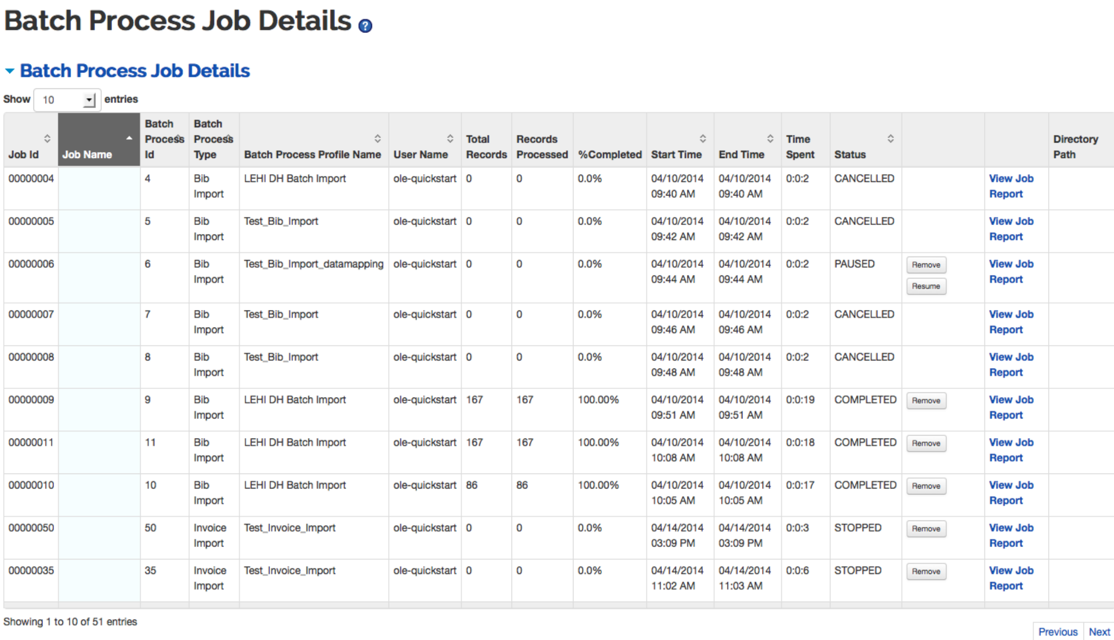


Field Id	Field Display Name	Field Name	Field Type
1	Bib Local Id	LocalId_search	String
2	Bib Status	Status_search	String
3	Bib Status Updated Date	statusUpdatedOn	Date
4	Date Updated(of Bib, Holdings or Item)	dateUpdated	Date
5	Date Entered(of Bib, Holdings or Item)	dateEntered	Date
6	Created By(of Bib, Holdings or Item)	createdBy	String
7	Updated By(of Bib, Holdings or Item)	updatedBy	String
8	Staff Only(of Bib, Holdings or Item)	staffOnlyFlag	String

As a function of OLE, you may search for batch process filter criteria. Execute a blank search to review the available batch process filter criteria.

Batch Process Job Details

The **Batch Process Job Details** screen displays the batch jobs that have run or are currently running. Staff may also restart a job, view the job report and remove the job from OLE.



Batch Process Job Details

Batch Process Job Details

Show 10 entries

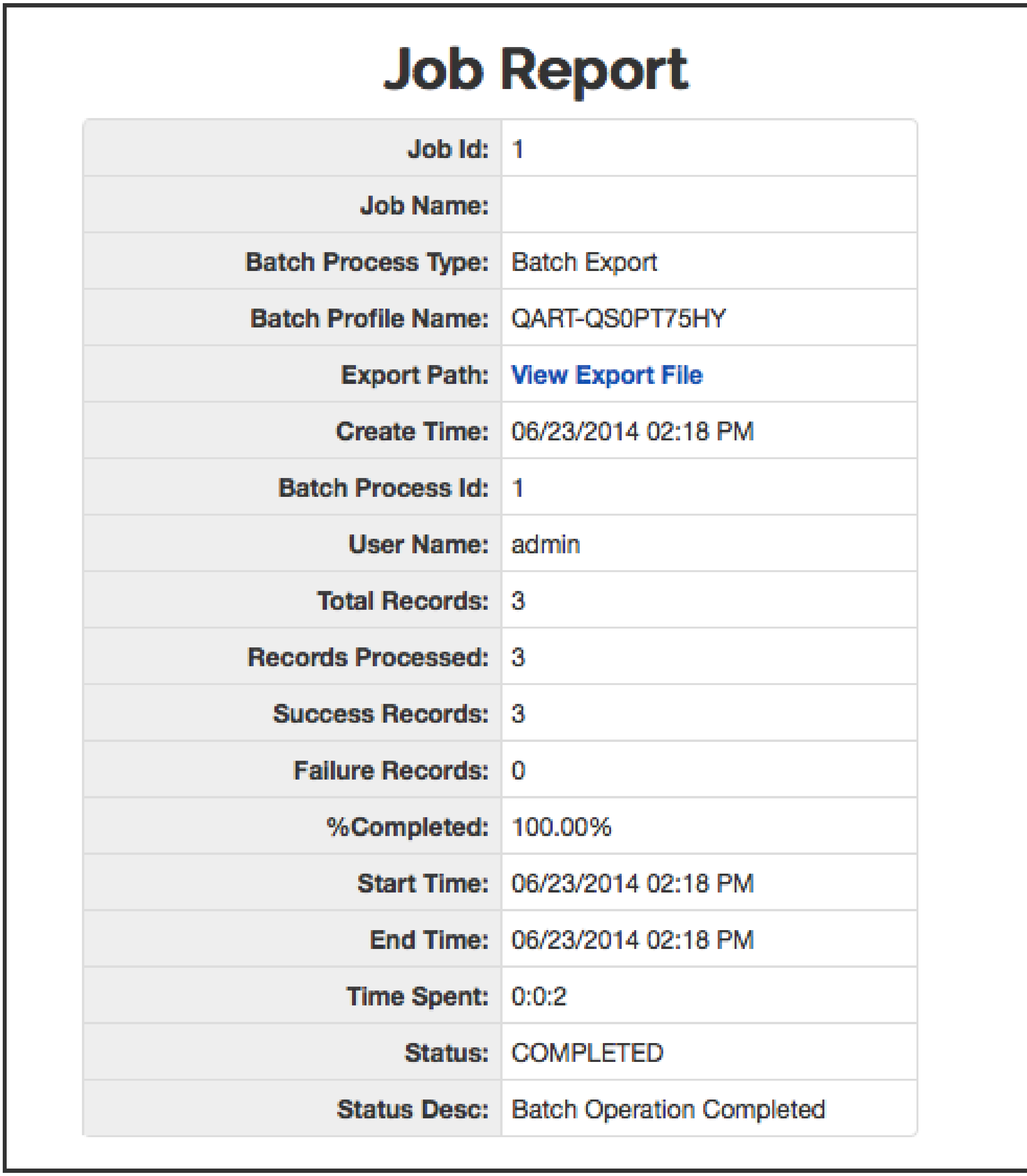
Job Id	Job Name	Batch Process Id	Batch Process Type	Batch Process Profile Name	User Name	Total Records	Records Processed	%Completed	Start Time	End Time	Time Spent	Status			Directory Path
00000004		4	Bib Import	LEHI DH Batch Import	ole-quickstart	0	0	0.0%	04/10/2014 09:40 AM	04/10/2014 09:40 AM	0:0:2	CANCELLED		View Job Report	
00000005		5	Bib Import	Test_Bib_Import	ole-quickstart	0	0	0.0%	04/10/2014 09:42 AM	04/10/2014 09:42 AM	0:0:2	CANCELLED		View Job Report	
00000006		6	Bib Import	Test_Bib_Import_datamapping	ole-quickstart	0	0	0.0%	04/10/2014 09:44 AM	04/10/2014 09:44 AM	0:0:2	PAUSED	Remove Resume	View Job Report	
00000007		7	Bib Import	Test_Bib_Import	ole-quickstart	0	0	0.0%	04/10/2014 09:46 AM	04/10/2014 09:46 AM	0:0:2	CANCELLED		View Job Report	
00000008		8	Bib Import	Test_Bib_Import	ole-quickstart	0	0	0.0%	04/10/2014 09:48 AM	04/10/2014 09:48 AM	0:0:2	CANCELLED		View Job Report	
00000009		9	Bib Import	LEHI DH Batch Import	ole-quickstart	167	167	100.00%	04/10/2014 09:51 AM	04/10/2014 09:51 AM	0:0:19	COMPLETED	Remove	View Job Report	
00000011		11	Bib Import	LEHI DH Batch Import	ole-quickstart	167	167	100.00%	04/10/2014 10:08 AM	04/10/2014 10:08 AM	0:0:18	COMPLETED	Remove	View Job Report	
00000010		10	Bib Import	LEHI DH Batch Import	ole-quickstart	86	86	100.00%	04/10/2014 10:05 AM	04/10/2014 10:05 AM	0:0:17	COMPLETED	Remove	View Job Report	
00000050		50	Invoice Import	Test_Invoice_Import	ole-quickstart	0	0	0.0%	04/14/2014 03:09 PM	04/14/2014 03:09 PM	0:0:3	STOPPED	Remove	View Job Report	
00000035		35	Invoice Import	Test_Invoice_Import	ole-quickstart	0	0	0.0%	04/14/2014 11:02 AM	04/14/2014 11:03 AM	0:0:6	STOPPED	Remove	View Job Report	

Showing 1 to 10 of 51 entries

Previous Next

Click **View Job Report** to view the report. If there were files that failed, the Job Report will display a link to the failure reason.

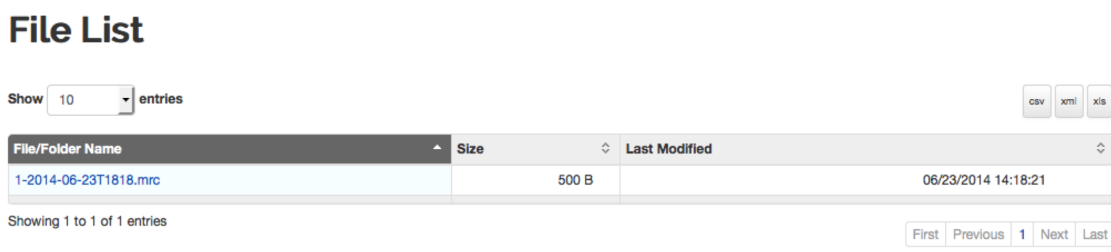
Below is an example of an batch export job report:



Job Report

Job Id:	1
Job Name:	
Batch Process Type:	Batch Export
Batch Profile Name:	QART-QS0PT75HY
Export Path:	View Export File
Create Time:	06/23/2014 02:18 PM
Batch Process Id:	1
User Name:	admin
Total Records:	3
Records Processed:	3
Success Records:	3
Failure Records:	0
%Completed:	100.00%
Start Time:	06/23/2014 02:18 PM
End Time:	06/23/2014 02:18 PM
Time Spent:	0:0:2
Status:	COMPLETED
Status Desc:	Batch Operation Completed

For batch exports only, clicking the **View Export File(s)** link allows you to view the files:



If the batch export type is incremental, the next time the job runs it will output a file of new and changed records and a .txt file of bib IDs for deleted bib records. If holdings records are modified or deleted, the bib record is output again in the next incremental update with only the holdings that remain output to the 9xx fields.

Batch Process Profile

Admin > Batch Processes > Batch Process Profile > Batch Process Profile Lookup

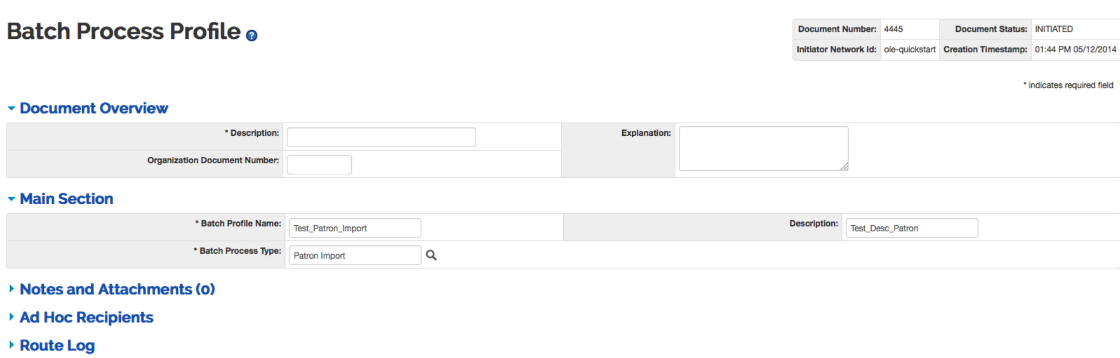
> Batch Process Profile

When you select the **Batch Process Profile** link from the **Admin** menu, the system displays the Batch Process Profile lookup. This screen allows staff to search for and edit pre-existing Batch Process Profiles or create new profiles.

Note

Once a Batch Process Profile is created, it cannot be deleted from the user interface.

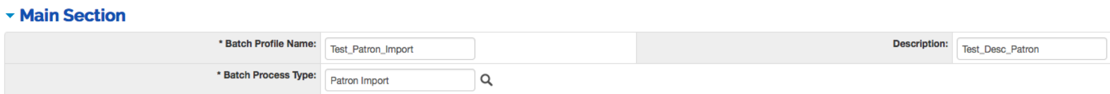
Document Layout



When creating a new Batch Process Profile, the only unique tab is the **Main Section**. However, depending on the **Batch Process Type** that is selected, different tabs are available for adding or modifying information for the profile.

Main Section tab

The **Main Section** tab contains basic information about the Batch Process Profile. Additional fields will appear in the Main Section tab depending on the Batch Process Type that is selected.



Main Section definition

Title	Description
Batch Process Name	Enter the name of the Batch Process.
Batch Process Type	Required. Enter the type of batch process or search for it from the lookup . For example, import patron, export bib, import order.
Description	Display only. Indicates whether the vendor is a parent or child record.
Data to Import	If the **Bib Import** type is selected, select the data type to import from the drop down list.
Requisitions for Titles	If the **Order Record Import** type is selected, select from the drop down list to have one requisition created per title or one requisition created for the order.
MARC Only	It the **Order Record Import** type is selected, and the file to be imported contains MARC records with embedded order data, check this box. If importing order data from an EDIFACT file, do not check this box.
Bib Import Profile	If the **Order Record Import** or **Invoice Import** type is selected, the Bib Import Profile is required to create or overlay bibliographic records. Search for the Bib Import Profile by the lookup to govern bib import parameters.
Data to Export	If the **Batch Export** type is selected, select from the drop down list to have only bibliographic data exported or bibliographic and instance data exported.
Export Scope	If the **Batch Export** type is selected, select from the drop down list how much should be exported: full export, filtered, incremental, or full except staff only bibs.

For **Patron import**, **Location import**, **Invoice import**, **Claim Report** and **Serial Record Import** the Main Section is the only tab available for adding or editing information.

Click submit to create a new profile for these types of batch processes.

Note

Serials Record Import was developed specifically for early adopters to migrate data into OLE. The loader allows data migrators to create three tables of data and load them without interfering with the workflow processes required by Rice. The three tables must be formatted in a very specific way. Each implementer, being unique in their previous systems, will have to work to create their own CSV or XML files to import. For additional information about the loader for 1.5 and the UChicago experience, see OLE-5642. If you have additional questions, please email ole.technical.usergroup@kuali.org.

Additional information for all other batch process types will be addressed below.

Order Record Import or Invoice Import: Constant and Default Values Tab

OLE supports two ways of importing order data:

- from a file of EDIFACT order messages, loaded in conjunction with a file of bibliographic data
- from order data embedded in each bibliographic record in a file

Order Record Import profiles have a "Marc only" checkbox on them. If checked, the profile will expect the user to load a file of bibliographic records alone, and will extract data from it to populate the order record. If the checkbox is left unchecked, it will expect the user to load a pair of files (bibliographic and EDIFACT) when using that profile.

If you are creating orders via embedded order data, you must specify which bibliographic fields and subfields contain which pieces of data. (This will vary from file to file, depending on the coding used by the data creator.) You can specify the mapping from bibliographic data to the requisition using the **Constant and Default Values** and **Data Mapping** sections of the profile.

Invoice import can likewise be done two ways:

- by loading a file of EDIFACT invoice messages
- by loading bibliographic records containing embedded invoice data

When loading an EDIFACT order message, you do not need to load bibliographic data at the same time. The file will try to match the invoice lines to existing purchase order lines as part of the load.

When loading invoice data embedded in bibliographic data, your invoice import profile should be linked to an existing bib import profile.

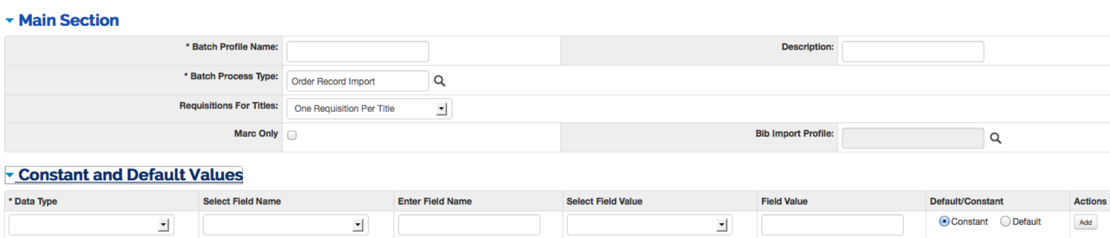
If the **Order Record Import** or **Invoice Import** type is selected from the **Main Section**, a new tab will load.

Enter the constant and default values and click 

.

Note

Do not forget to select items for the additional **Main Section** fields.



Constant and Default Values definition

Title	Description

Data Type	Select the **Data Type** from the drop down menu.
Select Field Name	Depending on the Data Type selected, select the field name from the drop down list.
Enter Field Name	Enter the field name to be defined as the constant or default value.
Field Value	Enter the field value to be defined as the constant or default value.
Default/Constant	Select the radio button for default or constant.
Action	Click Add to add the Default or Constant value.

Once your **Order Record Import** profile is completed, click submit.

The following fields are mandatory for an Order Record Import profile to create the Requisition.

For EDI and MARC (Constant and Default Values section):

1. Default Location
2. Item Type

Note

This Item Type does not refer to the Item Type listed on an Item Record (the maintenance table listed under Cataloging Maintenance). This refers to the line item on PURAP (S&A) documents. The only valid choice is "ITEM".

Item Types in the item record need to be entered on a Bib Import Profile that can be linked to the Order Import Profile.

3. Cost Source
4. Method of PO Transmission
5. Building Code
6. Delivery Campus Code
7. Org Code
8. Chart Code
9. Funding Source

For MARC only (Constant and Default Values section or Data Mapping section):

1. List Price
2. Vendor Number
3. Quantity
4. No Of Parts

5. Account Number
6. Object Code
7. Default Location
8. Item Type

Note

This Item Type does not refer to the Item Type listed on an Item Record (the maintenance table listed under Cataloging Maintenance). This refers to the line item on PURAP (S&A) documents. The only valid choice is "ITEM".

Item Types in the item record need to be entered on a Bib Import Profile that can be linked to the Order Import Profile.

9. Cost Source
10. Method of PO Transmission
11. Building Code
12. Delivery Campus Code
13. Org Code
14. Chart Code
15. Funding Source

Note

When typing a field value into the Constant and Default Values section, you must enter it exactly formatted as it is within OLE. For example, when adding Requestor Name you need to add LastName, FirstName.

Creating and Linking Items and E-Holdings during Order Record Import with a Bib Import Profile attached

Items and E-Holdings can be created by the Bib Import Profile and by the Order Record Import via the Requision's transition to a Purchase Order. In order to prevent OLE from creating both, a check has been added to the Order Record Import Profile. If an e-holdings or item record is created or modified by the Bib Import Profile, a second e-holding/item will not be created during the Requisition's transition to a Purchase Order. This ensures that only one new e-holding/item is linked to the Purchase Order and Bibliographic Record.

EDI Invoice Import Match Points

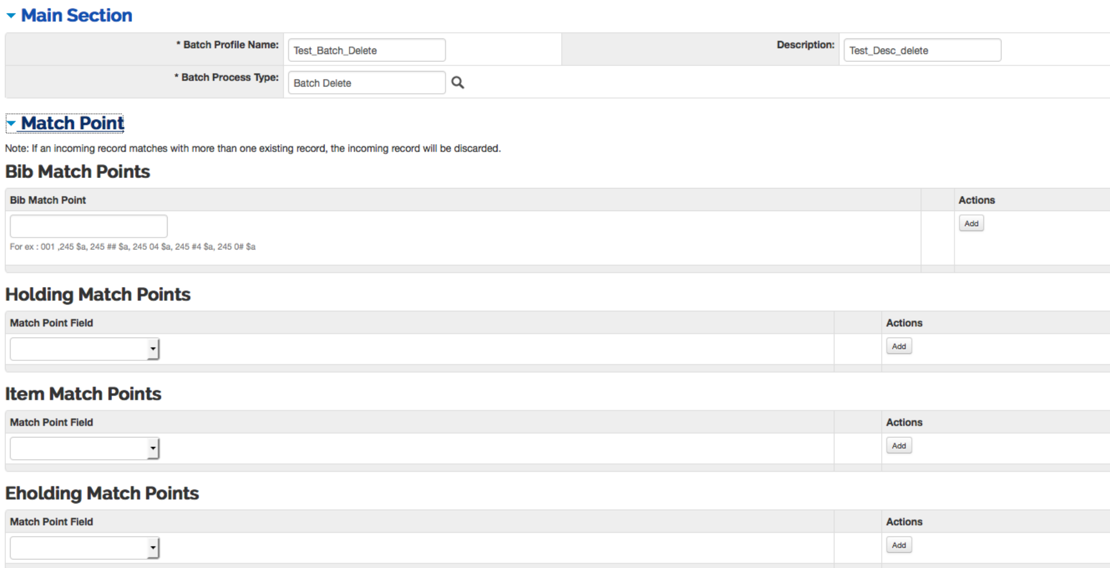
OLE will try to match each invoice line with its corresponding purchase order line. Match points are:

1. Primary match - the vendor’s ID number: stored in the Vendor Item Identifier field of the PO line item, and in the SNA segment of the EDIFACT message
2. Secondary match - ISSN, stored in the bib. record and in the PIA+5 segment of the EDIFACT message

3. Tertiary match - the OLE PO number, stored in the PO and the RFF+ON segment of the EDIFACT message

Batch Delete: Match Point Tab

If the **Batch Delete** type is selected from the **Main Section**, a new tab will load. The **Bib Match Point** tab is used to determine what records will be deleted from OLE. Enter the **match point** and click . Users may add as many match points as is necessary.



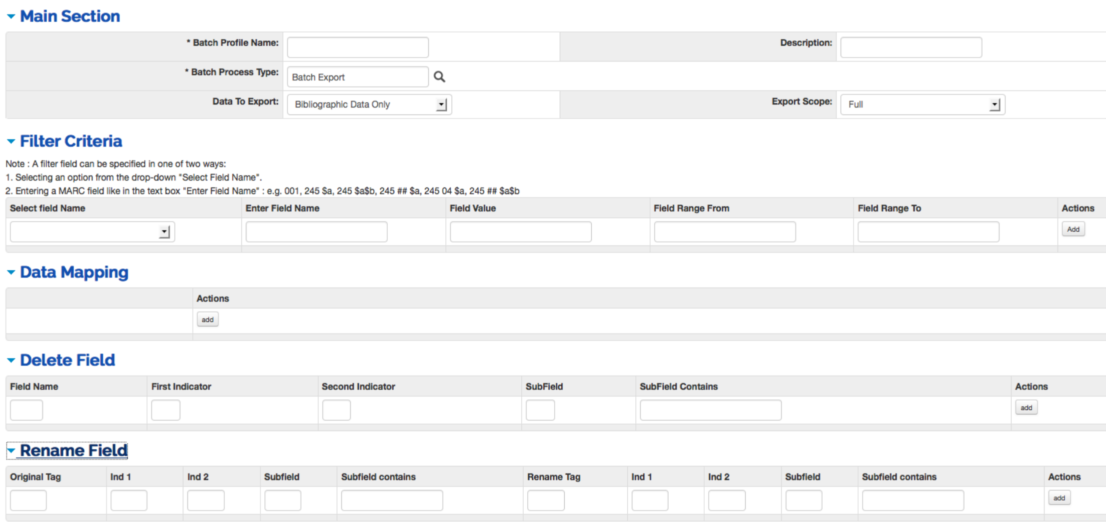
Batch Export

OLE does not provide a public discovery layer. As a result, staff will need to export bibliographic and OLE Instance data to various existing discovery layers. The existing systems expect MARC21 bibliographic records with 9xx local data fields containing a subset of information from OLE Instance records attached to the bibliographic records. OLE is able to suppress bibliographic or Instance data marked as staff only. OLE will also dump incremental updates with additions, modifications and deletions to bibliographic or Instance data as required by each library. OLE also allows the user to specify frequency of full and incremental exports. All of these actions can be set up in the profile and carried out through the **Batch Process** interface.

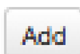
If the **Batch Export** type is selected from the **Main Section**, four additional tabs will load: **Filter Criteria**, **Data Mapping**, **Delete Field**, and **Rename Field**.

Note

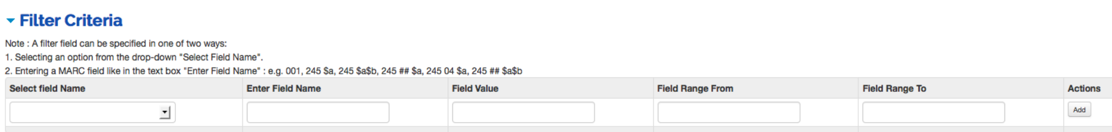
Do not forget to select items for the additional **Main Section** fields.



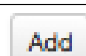
Filter Criteria Tab

If you chose filter in the **Export Scope** field of the **Main Section**, enter the filter criteria in the **Filter Criteria** tab and click 

.



Filter Criteria definition

Title	Description
Select Field Name	Select the field name from the drop down list.
Enter Field Name	If the field name does not appear in the **Select Field** drop down list, enter the field name to be defined as the constant or default value.
Field Value	Enter the field value to be defined as the constant or default value.
Field Range From	Enter a beginning field range to limit the filter.
Field Range To	Enter an ending field range to limit the filter.
Action	Click  to add the filter criteria value.

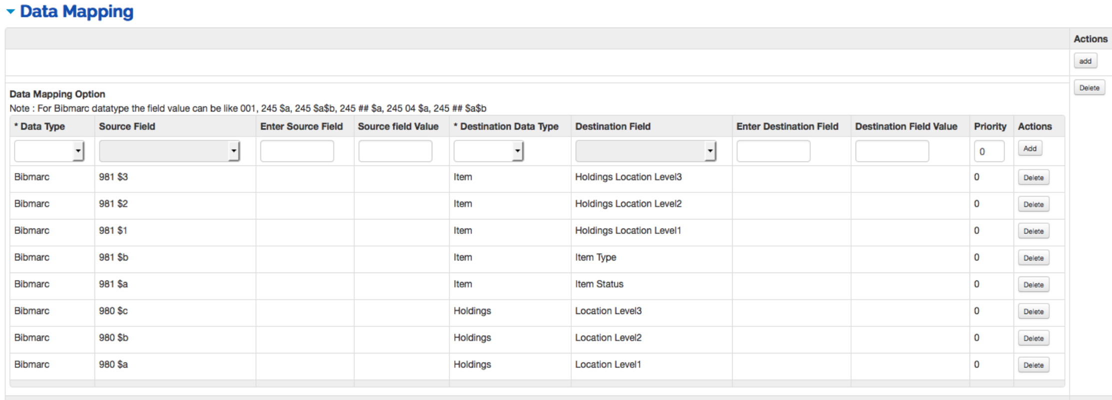
Data Mapping Tab

Click 

to add data mapping options.

Data mapping is divided into two sections. The first identifies the source field for the export and the second identities the destination field for which OLE will map to. Enter the source and destination information and click the 

button next to **Priority**.

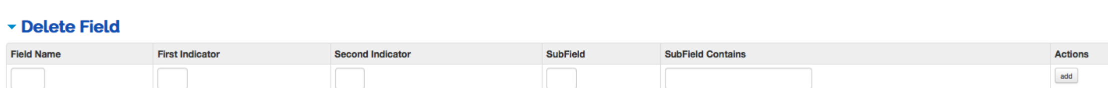


Data Mapping definition

Title	Description
Data Type	Select the type of data (Holding, Item, EHolding) from the drop down list.
Source Field	If you have chosen holding or item as the data type, select the OLE source field from the drop down menu.
Enter Source Field	If you have chosen bibmarc as the data type, enter a source field. For example "100 $a"
Source Field Value	If you have chosen bibmarc as the data type, enter a source field value.
Destination Data type	Select the type of destination data type (bibmarc, holding or item) from the drop down list.
Destination Field	If you have chosen holding or item as the data type, select the destination field from the drop down menu.
Enter Destination Field	If you have chosen bibmarc as the destination data type, enter a destination field. For example "100 $a"
Destination Field Value	If you have chosen bibmarc as the data type, enter a destination field value.
Priority	If the same source field is given multiple destinations, you may prioritize which should be first, second, third, and so on. **Note** You cannot map incoming data from multiple fields to a single field in OLE, unless you set priorities. In that case only the first met priority field will be mapped.
Action	Click  to add the Delete Field value.

Delete Field Tab

The **Delete Field** tab allows you to identify fields that will be deleted during the export. Enter the field information and click . Add as many fields as is needed.



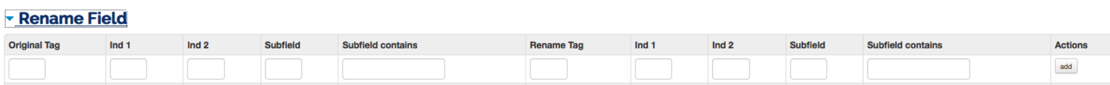
Delete Field definition

Title	Description

Field Name	Enter the bibliographic field name to be deleted. For example "101" or "245"
First Indicator	Optional. Enter the first indicator to be deleted.
Second Indicator	Optional. Enter the second indicator to be deleted.
SubField	Optional. Enter the subfield to be deleted.
SubField Contains	Optional. Enter the information the subfield contains that will be deleted during the export.
Action	Click Add to add the Delete Field value.

Rename Field Tab

The **Rename Field** tab is used to rename or change fields during the export. It is divided into two sections. The first identifies the original tag within OLE for the export and the second identities the newly named field in the exported record. Enter information for both the original and rename tags and click Add.



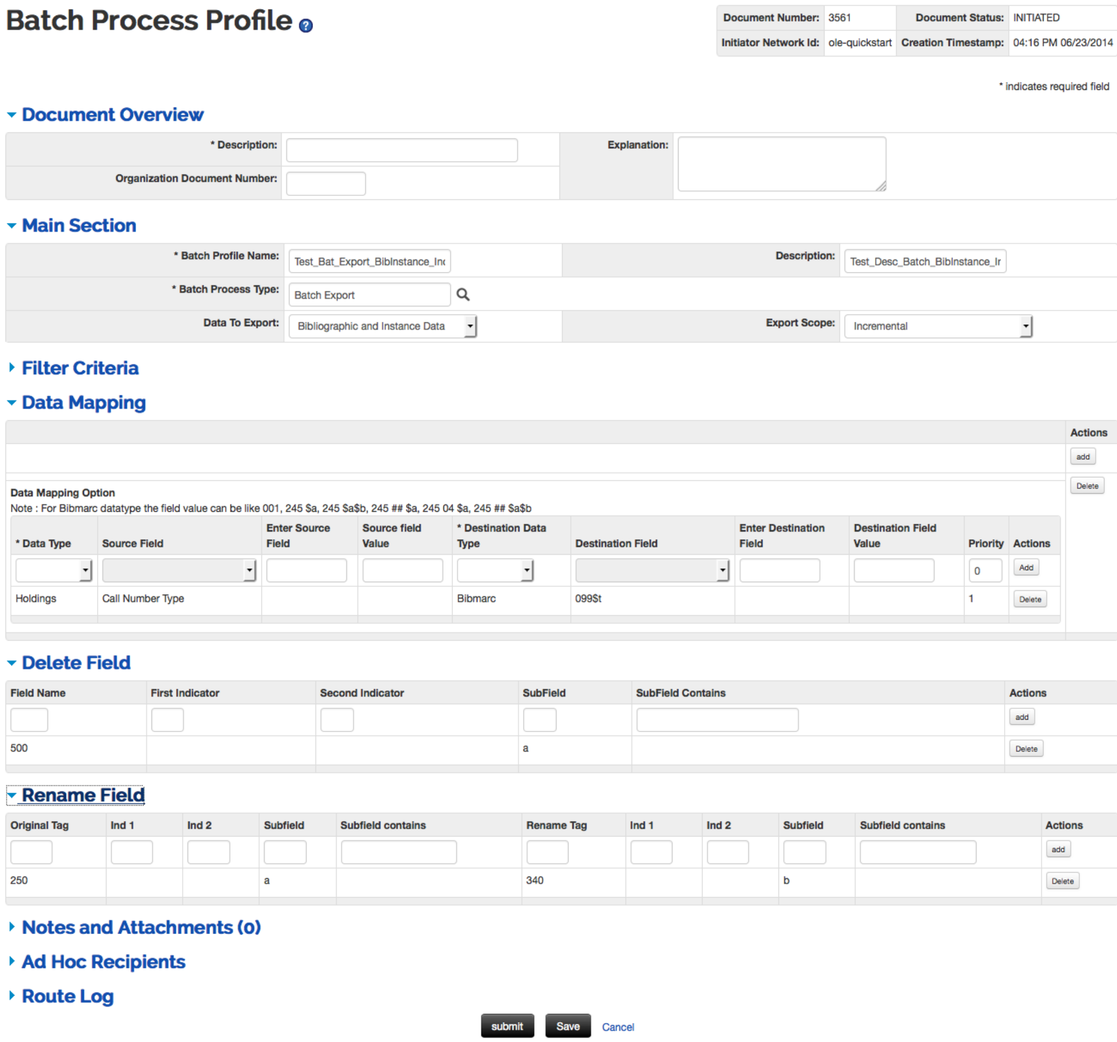
Rename Field definition

Title	Description
Original Tag	Enter the numeric MARC tag that you wish to rename.
Ind 1	Enter the Indicator 1 that will be changed.
Ind 2	Enter the Indicator 2 that will be changed.
Subfield	Enter the subfield that will be changed.
Subfield Contains	Enter the information that the subfield contains to be changed.
Rename Tag	Enter the replacing numeric MARC tag.
Ind 1	Enter the replacing Indicator 1 value.
Ind 2	Enter the replacing Indicator 2 value.
Subfield	Enter the replacing Subfield.
Subfield Contains	Enter the replacing subfield content.
Action	Click Add to add the Rename Field value.

Example

The most common set up for a batch export is the "incremental" type (set by Export Scope), without a filter and with data mapping of Holdings data as required by the library's discovery layer.

Here is an example:



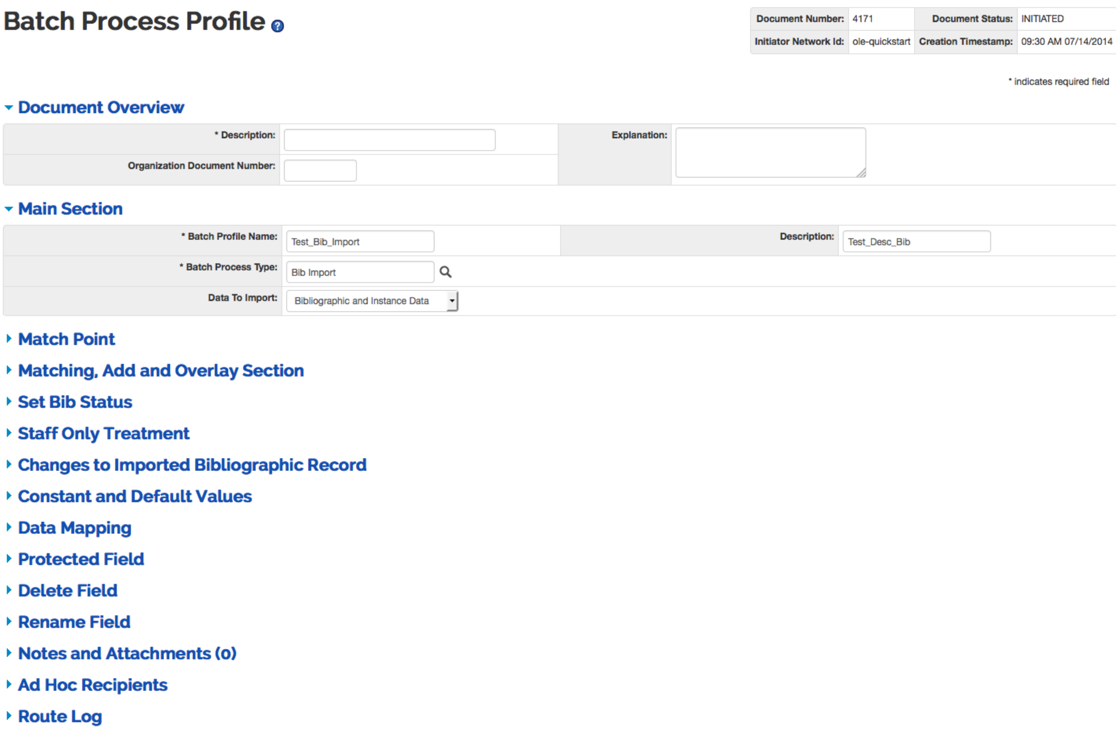
After creating and saving your Batch Process Profile, go to the Batch Process interface to set up your incremental export to run on a schedule.

Bib Import

If the **Bib Import** type is selected from the **Main Section**, additional tabs will load: **Match Point**, **Matching, Add and Overlay Section**, **Set Bib Status**, **Staff Only Treatment**, **Changes to Imported Bibliographic Record**, **Constant and Default Values** (described above), **Data Mapping**, **Protected Field**, **Delete Field**, and **Rename Field**.

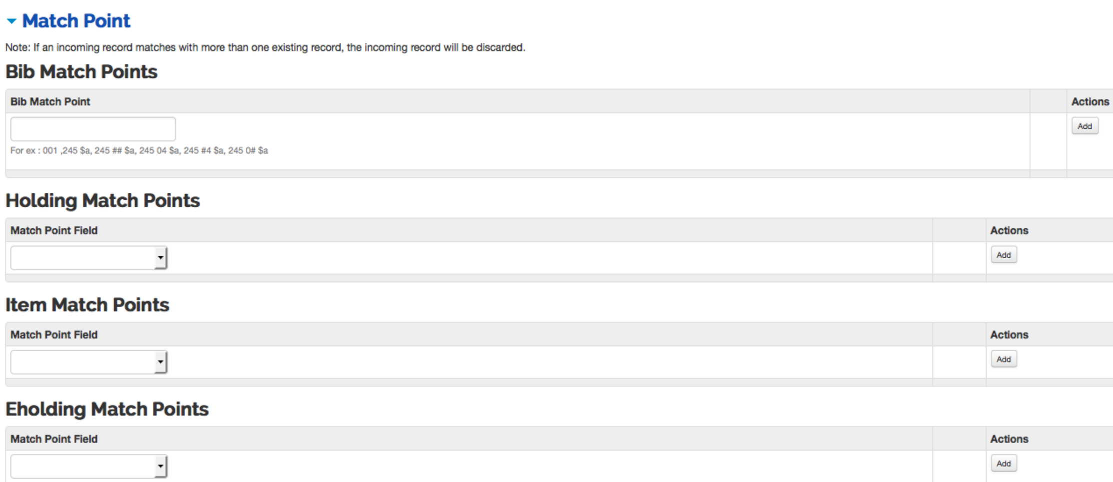
Note

All imported MARC bibliographic records must be Unicode-compliant (UTF-8).



Match Point Tab

On the **Match Point** tab, you may enter match point(s) for the bibliographic, holding, item, or e-holding records. If you add more than one match point, OLE will prioritize them by the order they have been entered (First entered, first matched). Click Add after adding each match point.



Matching, Add and Overlay Section

Depending on the **Data to Import** selection you have chosen on the Main Section Tab, the **Matching, Add and Overlay Section** allows user to determine what the course of action will be when importing records. Click the radio buttons to make your selection.

Tip

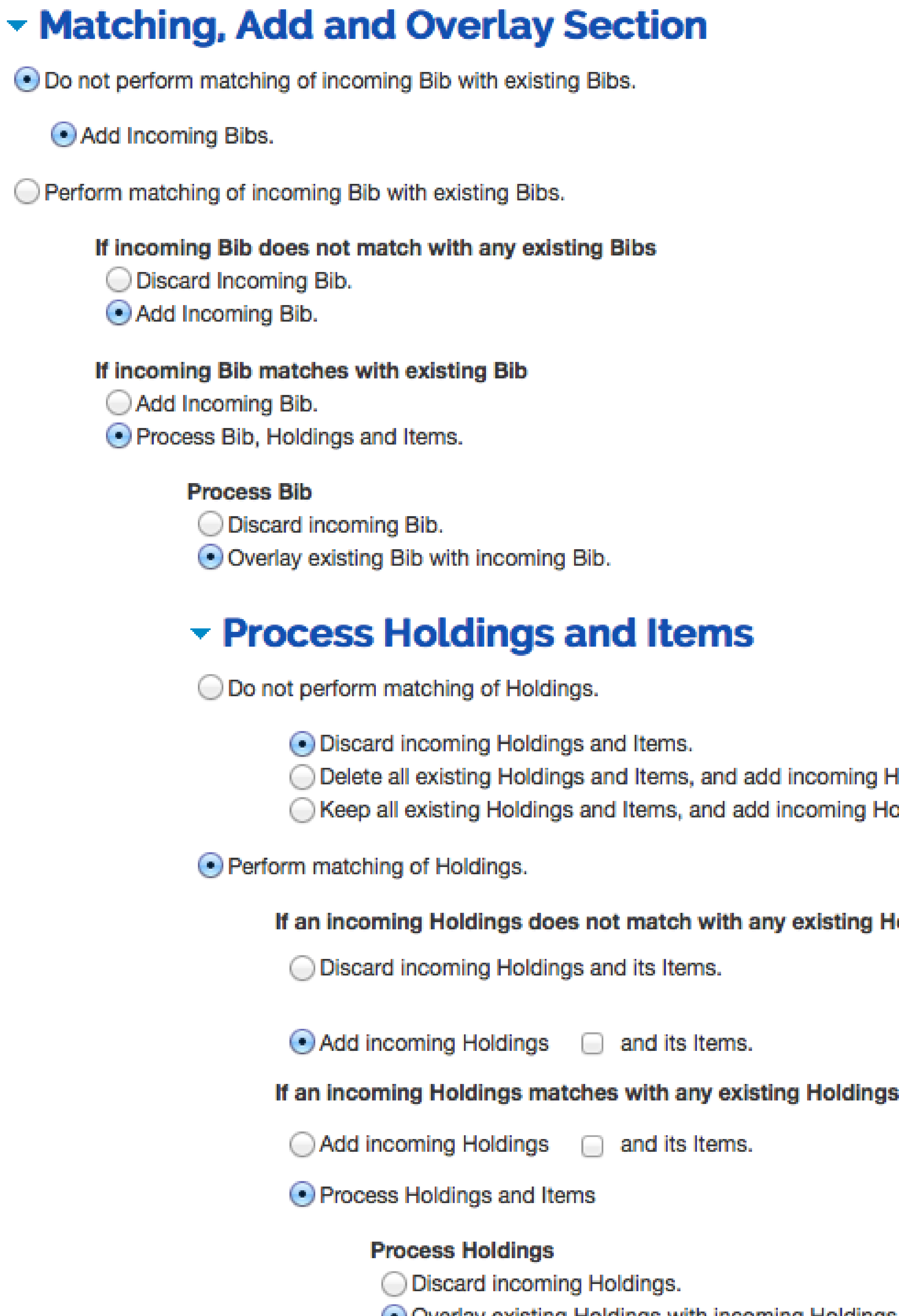
Follow the tree structure to make your selections - decide: **Do not perform matching on incoming Bib with existing Bibs** or **Perform matching of incoming Bib with existing Bibs**. If you choose to perform matching, look at the next set up of **If** statements and make your selections. Continue on only as deeply into the tree structure as you need to go.

Only open one section at a time, as needed (focus on bibs first, then look at Process Holdings and Items).

One radio buttons will always be selected in each section, even when that section is not applicable.

Note

If you select **Perform matching of incoming Bib with existing Bibs**, you must have a match point selected. If you select **Add Incoming Bib** under **If incoming Bib does not match with any existing Bibs**, you will receive a failure report when you run the batch process. In a future release, OLE will alert users of this error before the profile is finalized. See OLE-6789.


Matching, Add and Overlay Section
Do not perform matching of incoming Bib with existing Bibs.
Add Incoming Bibs.
Perform matching of incoming Bib with existing Bibs.
If incoming Bib does not match with any existing Bibs
Discard Incoming Bib.
Add Incoming Bib.
If incoming Bib matches with existing Bib
Add Incoming Bib.
Process Bib, Holdings and Items.
Process Bib
Discard incoming Bib.
Overlay existing Bib with incoming Bib.
Process Holdings and Items
Do not perform matching of Holdings.
Discard incoming Holdings and Items.
Delete all existing Holdings and Items, and add incoming H
Keep all existing Holdings and Items, and add incoming Ho
Perform matching of Holdings.
If an incoming Holdings does not match with any existing H
Discard incoming Holdings and its Items.
Add incoming Holdings
and its Items.
If an incoming Holdings matches with any existing Holdings
Add incoming Holdings
and its Items.
Process Holdings and Items
Process Holdings
Discard incoming Holdings.

Set Bib Status Tab

Depending on the **Data to Import** selection you have chosen on the Main Section Tab, the **Set Bib Status** tab allows user to set the statuses of the new or overlaid bibliographic records. Select the statuses from the drop down menu. For overlaid records, you may choose not to change the status.

Staff Only Treatment Tab

The **Staff Only Treatment** tab allows user to turn on the staff only flag in the cataloging record. For new records, check the box to apply the staff only flag to new bibliographic, instance, or item records. To set staff only for overlaid bibs, check the box at **For Overlaid Bib set Staff Only**.

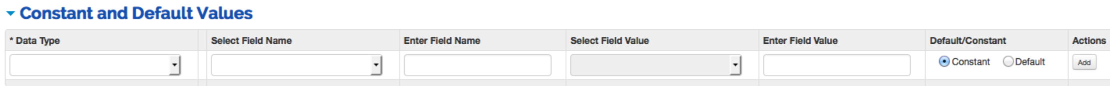
Changes to Imported Bibliographic Record Tab

The **Changes to Imported Bibliographic Record** tab allows users to modify or delete the 001 field if one exists in the incoming record. If you choose to replace the 001 with a new 035, you will be asked about prepending the contents of the 001 with the 003 field in parenthesis or with a stated value (the prepended contents of the 003 field then the 001 field will appear on a new 035 field in the imported record). To remove prefixes from the incoming 001 data, check the box by **Remove from 001** and enter the prefix to remove, for example, ocn or ocn, ocm.

Constant and Default Values

The **Constant and Default Values** tab is used to set default or constant values in OLE bibliographic, holding, e-holding, and item fields.

Enter the constant or default values and click .



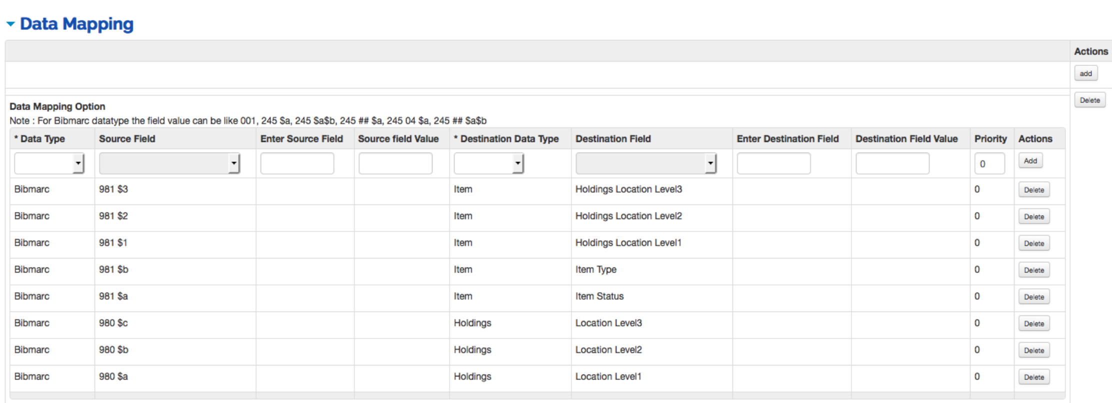
Constant and Default Values definition

Title	Description
Data Type	Select the type of date (bib, holding or item) from the drop down list.
Select Field Name	If you selected holding or item from the **Data Type**, select the field name from the drop down list.
Enter Field Name	Enter the field name to be defined as the constant or default value.
Field Value	Enter the field value to be defined as the constant or default value.
Default/Constant	Select the radio button for default or constant. • "Constant" data will be added to all records created or modified by the batch process. • "Default" data will be added to records unless other data is identified for that field in the Data Mapping section.
Action	Click  to add the Default or Constant value.

Data Mapping Tab

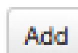
Click  to add data mapping options.

The **Data mapping** tab is divided into two sections. The first identifies the source field for the import and the second identities the destination field for OLE. Enter the source and destination information and click the  button next to **Priority**.



Data Mapping definition

Title	Description
Data Type	Select the type of data (bibmarc, holding or item) from the drop down list.

Source Field	If you have chosen holding or item as the data type, select the OLE source field from the drop down menu.
Enter Source Field	If you have chosen bibmarc as the data type, enter a source field. For example "100 $a"
Source Field Value	If you have chosen bibmarc as the data type, enter a source field value.
Destination Data Type	Select the type of destination data type (bibmarc, holding or item) from the drop down list.
Destination Field	If you have chosen holding or item as the data type, select the destination field from the drop down menu. **Note** The Destination Field options do not appear until you have made a selection in the Destination Data Type Field.
Enter Destination Field	If you have chosen bibmarc as the destination data type, enter a destination field. For example "100 $a"
Destination Field Value	If you have chosen bibmarc as the data type, enter a destination field value.
Priority	If the same incoming record could have the same information in multiple fields (for example call numbers), you may prioritize which should fill the OLE record first or second, and so on. **Note** You cannot map incoming data from multiple fields to a single field in OLE, unless you set priorities. In that case only the first met priority field will be mapped.
Action	Click  to add the Delete Field value.

Note

If your Bib Import Profile is set to create holdings and items, then you will need to specify a data source for the two required fields in the item record: Item Status and Item Type. These can be specified either in the Constant and Default Data section or the Data Mapping section.

Protected Fields Tab

The **Protected Fields** tab is divided into two tabs.

- The **Globally Protected Fields** allows user to view the globally protected fields defined for your OLE system. Click the checkbox to ignore the global protection of any of the fields listed.

  ### Note

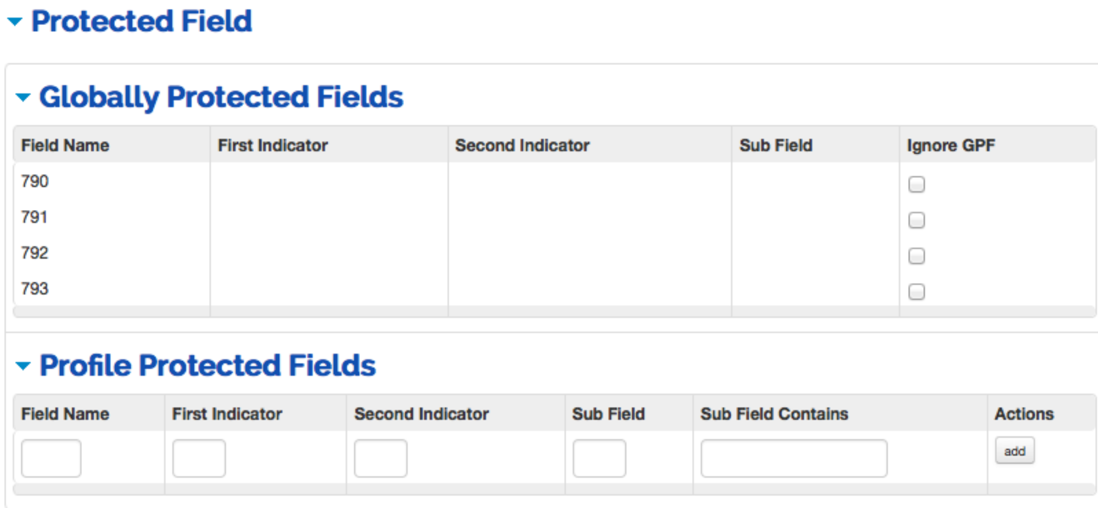
  For information on how to add and maintain globally protected fields, see the section of the *Guide to the OLE Describe and Manage Module.*

- The **Profile Protected Fields** allows users to add fields to protect only when using this profile. Input field information and click .

  ### Note

  Some fields may have multiple occurrences to be protected in both the incoming and the existing record (the 590, for example). In OLE 1.5, the protected fields listed in the **Profile**

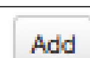
Protected Fields will be protected for the existing record but will ignore those in the incoming record. This is to be addressed in a later release, see [OLE-6848](OLE-6848).



Delete Field

The **Delete Field** tab allows you to identify entire fields to be deleted from the imported record(s) during the import process. Enter the field information and click . Add as many fields as is needed.

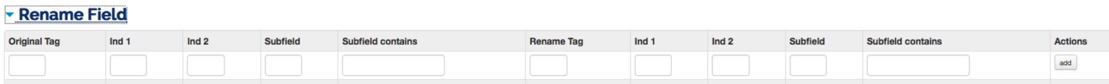
Delete Field definition

Title	Description
Field Name	Enter the bibliographic numeric tag of the field to be deleted. For example "710" or "245"
First Indicator	Optional. Use to delete a field with a particular first indicator value. Example: To delete field 510 with first indicator 4, enter "510" as Field Name and "4" as First Indicator.
Second Indicator	Optional. Use to delete a field with a particular second indicator value. Example: To delete field 856 with second indicator 1, enter "856" as Field Name, and "1" as Second Indicator.
SubField	Optional. Use to delete a particular subfield within a field. Example: To delete subfield 2 from field 655, enter "655" in Field Name and "2" in Subfield.
SubField Contains	Optional. Use to delete a field when it contains a subfield with a particular value. Example: To delete field 710 when subfield a contains LINK, enter "710" in Field Name, "a" in Subfield, and "LINK" in Subfield Contains.
Action	Click  to add the Delete Field value.

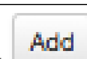
Rename Field

The **Rename Field** tab is used to change field tags and data during the import. It is divided into two sections. The first identifies the original tag from the imported record and the second identities the newly named MARC elements in the OLE record. Enter information for both the original and renamed data and click 

.

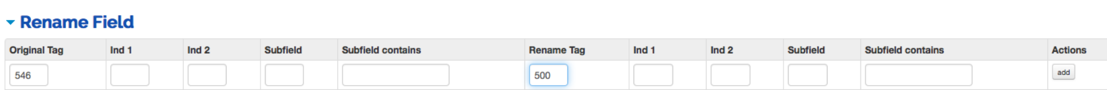


Rename Field definition

Title	Description
Original Tag	Enter the numeric tag from the imported record that you wish to rename during import.
Ind 1	Enter the value of Indicator 1 from the imported record that will be changed.
Ind 2	Enter the value of Indicator 2 from the imported record that will be changed.
Subfield	Enter the subfield from the imported record that will be changed.
Subfield Contains	Enter the information that the subfield contains that will be changed.
Rename Tag	Enter the replacing numeric tag.
Ind 1	Enter the replacing Indicator 1 value.
Ind 2	Enter the replacing Indicator 2 value.
Subfield	Enter the replacing Subfield name.
Subfield Contains	Enter the information that will replace the content in the imported record.
Action	Click  to add the Rename Field value.

Examples

Rename tag 546 to 500:

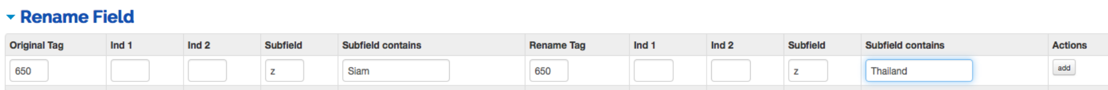


Change 245 first indicator value from 0 to 1:

Change 730 second indicator value from 2 to 0:

Change 651 subfield x to 651 subfield v:

Change 650 subfield z with text "Siam" to "Thailand":



Batch Process Schedule

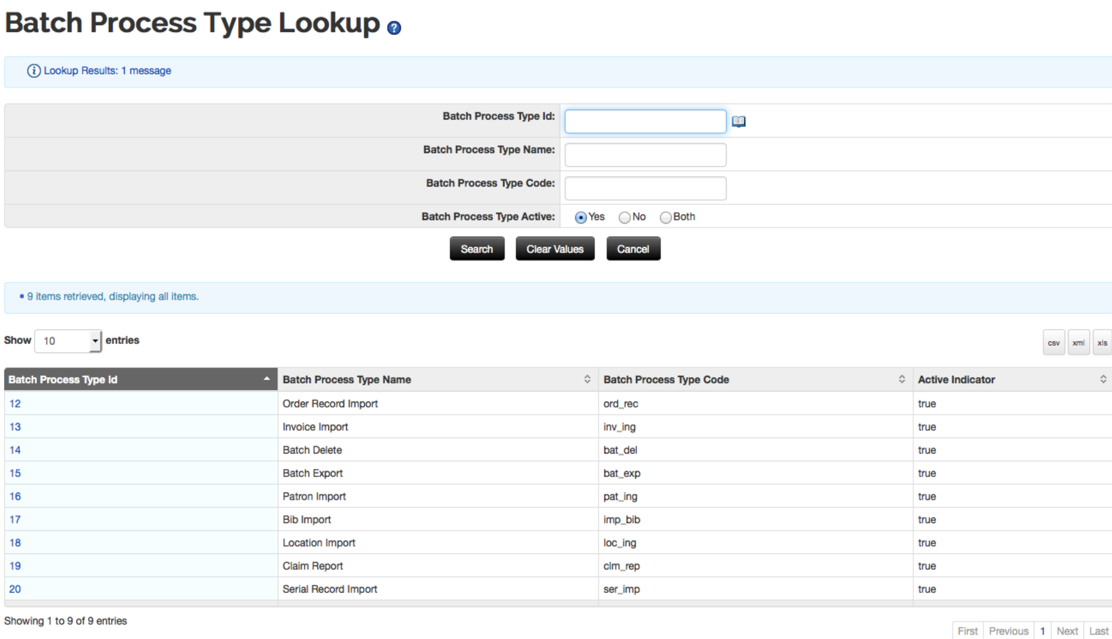
The **Batch Process Schedule** displays jobs that are scheduled to run. Staff may also reschedule or remove the job from OLE.

Batch Process Type

The **Batch Process Type** is a maintenance document used to support batch process profile. Depending on the batch process type selected, the Batch Process Profile will display particular tabs and fields. Batch Process Types are heavily tied into the workflow of batch processes and therefore you cannot add or edit Batch Process Types.

Note

Technical assistance is required to add new or edit existing batch process types.



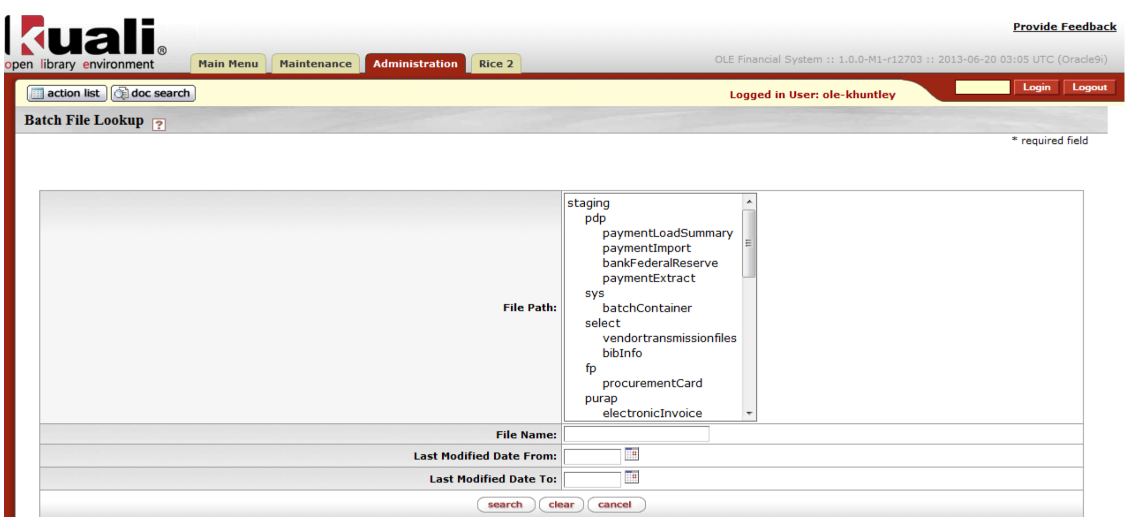
As a function of OLE, you may search for batch process types. Execute a blank search to review the available batch process types.

Batch File

Admin > Batch Processes > OLE FS Batch > • Batch File > Batch File Lookup

The Batch File lookup allows users to view OLE files, reports and logs. Users can search for files by name, date and by indicating what OLE file directory they reside in. Batch files can be downloaded or deleted.

Only members of OLE-SYS Manager group can download and act on batch files through this interface.



Batch File Lookup screen definition

Title	Description
File Path	Select the directory or sub-directory in which the file you wish to retrieve resides. Click the directory you wish to search. In the default configuration the 'reports' directory contains reports and log files generated by batch jobs. These reports exist in sub-directories corresponding to the module that owns the batch job. The Staging directory contains input files brought into OLE (such as procurement card or collector upload files) as well as export files generated by OLE (such as check files from PDP). These reports also exist in sub-directories corresponding to the module they are associated with. Some modules may have additional sub-directories further dividing their Staging output.
File Name	Enter the file you wish to retrieve.
Last Modified Date From	Enter or use the calendar to select a beginning date range for your search.
Last Modified Date To	Enter or use the calendar to select an ending date range for your search.

Reports that match your search will be displayed, showing their name, location and file size (in bytes.) Options in the Actions column allow you to Download or Delete the files.

Actions	File Path	File Name	Last Modified Date	File Size
Download Delete	staging/fp/procurementCard	transactionWithExtraFields.xml	07/23/2009 06:08 AM	3959
Download Delete	staging/fp/procurementCard	allTransDifferentCC.xml	07/23/2009 06:08 AM	3604
Download Delete	staging/fp/procurementCard	allTransSameCC.xml	07/23/2009 06:08 AM	3574
Download Delete	staging/fp/procurementCard	badChartData.xml	07/23/2009 06:08 AM	1824
Download Delete	staging/fp/procurementCard	badXmlFile.xml	07/23/2009 06:08 AM	680
Download Delete	staging/fp/procurementCard	fieldsInWrongOrder.xml	07/23/2009 06:08 AM	2714
Download Delete	staging/fp/procurementCard	transactions1.xml	07/23/2009 06:08 AM	18769

Warning

Note that manually deleting files via this interface should be done with great caution. There is no interface to undo a deletion and removing certain files may cause batch jobs or processes to fail.

The most common use for deleting a file is to remove a '.done' file from data files such as those created by the GLCP, LLCP or uploaded via the Collector. OLE creates two files for these particular processes, one ending in a '.data' extension and another ending in a '.done' extension. Deleting the '.done' extension file will keep the associated '.data' file from being processed by its associated batch processes but leave the data file itself for reference.

Batch/Scheduled Jobs

Admin > Batch Processes > OLE FS Batch > Batch/Scheduled Jobs > Batch Job Lookup > Batch Job

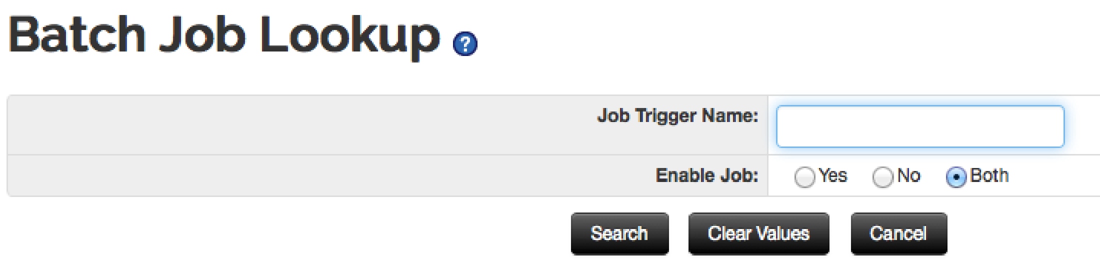
The Batch/Scheduled Jobs document allows users to edit the cron expression which specifies when the particular job should be scheduled. This interface is only for OLE-created jobs (Circulation jobs for example) and not KFS-inherited jobs. To learn more about each of the jobs available in Deliver, see Batch Processes in the *OLE Guide to Deliver Module*

Batch Job Lookup

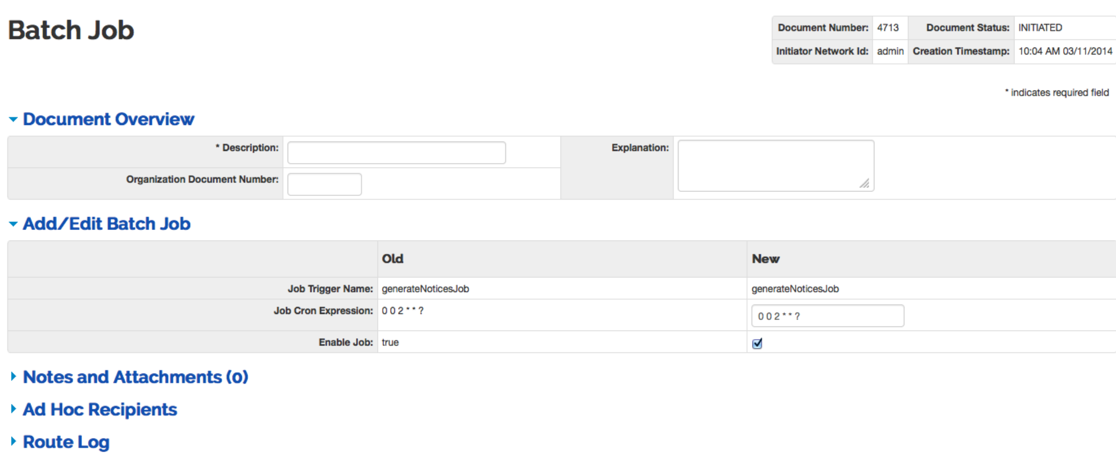
You cannot create a new document. You must search for a job and choose to **edit** it from the search results.

Tip

Enter a blank search to see all available jobs and their cron expressions.



Document Layout



The Batch Job document includes the **Add/Edit Batch Job** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

Add/Edit Batch Job definition

Title	Description
Job Trigger Name	Display Only. The name of the batch job that needs to be scheduled.
Job Cron Expression	Enter the cron expression for when the job should be scheduled.
Enable Job	Check the box to allow the job to run.

Job CRON Expression - controlling the frequency/ schedule of job execution

CRON enables users to schedule jobs to run periodically at certain times or dates. A CRON expression is a string comprised of 5 or 6 fields separated by white space that represents a set of times, normally as a schedule to execute some routine.

Example:

0 15 10 * * ?

0/2 0 12 * * ?

CRON Field definition

Field Placement	Description
First Field	Represents seconds. The allowed values are 0-59. **Example:** 2 0 12 * * ? - This will fire the job at 12:00:02 PM every day. 0/2 0 12 * * ? - This will fire the job every 2 seconds from 12:00:00 PM to 12:00:58 PM every day.
Second Field	Represents minutes. The allowed values are 0-59. **Example:** 0 5 12 * * ? - This will fire the job at 12:05 PM every day. 0 0/5 12 * * ? - This will fire the job every 5 minutes from 12:00 PM to 12:55 PM every day.
Third Field	Represents hours. The allowed values are 0-23. **Example:** 0 5 10 12 * * ? - This will fire the job at 12:05 PM every day. 0 5 12,18 * * ? - This will fire the job every 5 minutes from 12:00 PM to 12:55 PM and from 6:00 PM to 6:55 PM every day.
Fourth Field	Represents days of the month. The allowed values are 1-31. **Example:** 0 5 10 12 * * - This will fire the job at 10:05 AM on the 12th day of every month. 0 0 12 1/5 * ? - This will fire the job at 12:00 PM every 5 days every month, starting on the first day of the month.
Fifth Field	Represents months. The allowed values are 1-12 or JAN-DEC. **Example:** 0 11 11 11 11 ? *or* 0 11 11 11 NOV ? - This will fire the job at 11:11 AM on November 11th of each year.
Sixth Field	Represents days of the week. The allowed values are 1-7 or SUN-SAT. **Example:** 0 10,44 14 ? 3 WED *or* 0 10,44 14 ? 3 4 - This will fire the job at 2:10 PM and 2:44 PM on every Wednesday in the month of March. 0 10,44 14 ? 3 WED-FRI - This will fire the job at 2:10 PM and 2:44 PM from Wednesday to Friday each week during the month of March.

Special Character definition

Special Character	Description
'*'	Represents all possible values. **Example:** 0 0 12 * * ? - This will fire the job at 12:00 PM every day of every month in each year.
'?'	Represents no specific value for the particular field. **Example:** 0 0 12 * * ? - This will fire the job at 12:00 PM every day of every month in each year irrespective of the day in a week.

'-'	Represents the range of values for a corresponding field. **Example:** 0 0 14 ? * WED-FRI - This will fire the job at 2:00 PM from Wednesday, Thursday, and Friday of every week.
'/'	Represents incremental values specified to the field **Example:** 0 0 0/2 * * ? - This will fire the job every 2 hours starting at 12 AM.
'L'	Represents the last value in the specified field. This character is only allowed in the fourth and sixth field. **Example:** 0 15 10 ? * 6L - This will fire the job at 10:15 AM on the last Friday of every month. 0 15 10 L * ? - This will fire the job at 10:15 AM on the last day of every month.
'#'	Represents the "nth" XXX day of the month. This character is only allowed in the sixth field. **Example:** 0 15 10 ? * 6#3 - This will fire the job at 10:15 AM on the third Friday of every month. 0 15 10 ? * 4#5 - This will fire the job at 10:15 AM on the fifth Wednesday of every month. Note that if there is not a fifth Wednesday, the job will not fire.

Batch Semaphore File Upload

Admin > Batch Processes > OLE FS Batch > Batch Semaphore File Upload >

Batch Error Semaphore File Upload

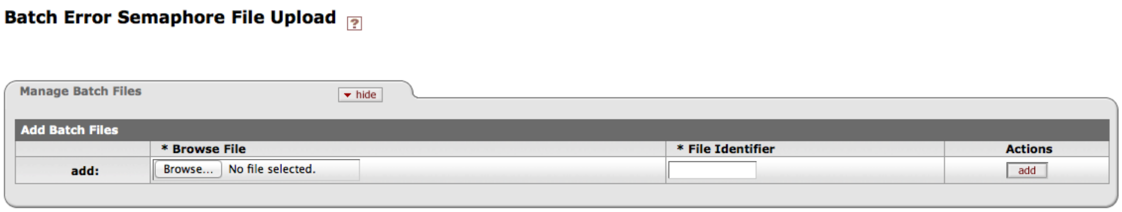
Tip

Because this functionality was inherited from KFS, additional information can be found in their technical documentation located on the wiki pages Batch 5 and Batch Container 5.

- Currently configured to only upload error files, but can easily be configured to upload the other file types
- To upload an error file for a Step (a stage in a job) create a new text file and name it whatever you like. The first line of the file should contain the name of the job and the the name of the Step (the bean id) in the format **jobName~stepName**. This line and all subsequent lines in the file will be considered error messages and will be logged by BatchStepTrigger.
- The File Identifier is required by the upload page, but is not used so enter anything.
- Once the file is saved to the batch container directory its name will be **jobName~stepName.error**.

Note

In KFS, the Bath Semaphore File Upload is secured by the KFS-SYS Technical Administrator role. While OLE does have a complementary role, the permission "Upload semaphoreInputFileTypeError" will need to be added to the role before using the document.



Schedule

Admin > Batch Processes > OLE FS Batch > • Schedule > Batch Job Lookup > Modify Batch Job

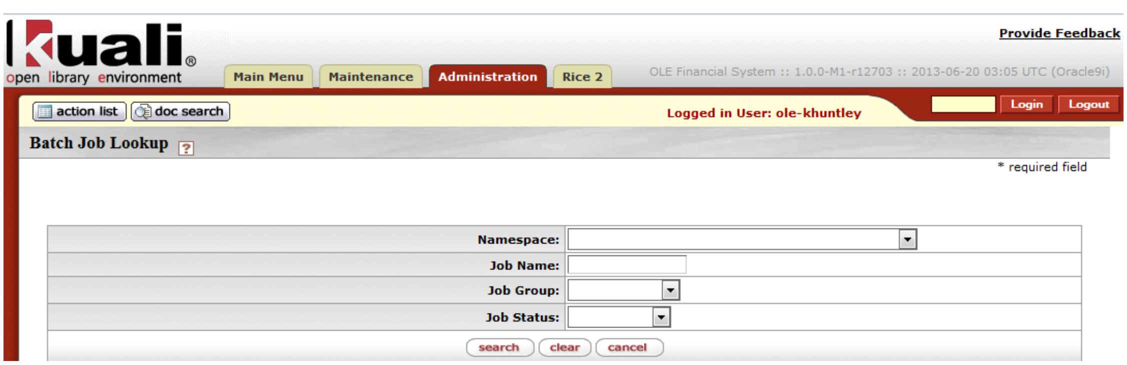
The Schedule option allows users to view, schedule or execute OLE batch processes (commonly called 'jobs' or 'batch jobs'). Scheduling is very necessary for OLE as there are many jobs - some running nightly, hourly, and others that only run after another job has successfully run.

Tip

Because this functionality was inherited from KFS, additional information can be found in their technical documentation located on the wiki page Batch 5.

Only members of OLE-SYS Operations or KR-SYS Technical Administrator role modify batch jobs though this interface though all users can use the batch job lookup. Members of OLE-SYS Operations can edit any existing schedule job belonging to an OLE namespace. Members of KR-SYS Technical Administrators can edit any existing schedule job belonging to the KR namespace.

When you select the **Schedule** option from the **Admin** menu, the system displays the Batch Job Lookup. This screen allows you to search for batch jobs by namespace, name, group, and statuses.



Batch Job Lookup screen definition

Title	Description
Namespace	Select the Namespace (application and module) the job is associated with.
Job Name	Enter the name of the job prescribed by the system.
Job Group	Select from the Job Group list. The valid selections are Scheduled: Jobs which are on the standard schedule. Jobs in this group are automatically

	executed by the schedulerJob. Unscheduled: Normal groups, all jobs are present in this group. These jobs must be executed manually.
Job Status	Select from the Job Status list. The valid selections are: Scheduled: Job has been scheduled for later execution Succeeded: Job finished executing successfully Canceled: Job was canceled, either before or during execution Running: Job is currently executing Failed: Job failed during execution For more detail about the status of a job or any problems it encountered while executing you can view its associated log file using the Batch File Lookup.

The screen returns the applicable list of jobs:

Actions	Namespace	Job Name	Job Group	Job Status	Next Run Time	Steps	Dependencies
Modify	OLE-COA	populatePriorYearDataJob	unscheduled			updatePriorYearDataStep	
Modify	OLE-COA	cfdaJob	unscheduled			cfdaBatchStep	
Modify	OLE-COA	addPriorYearAccountsJob	unscheduled			addPriorYearAccountsStep	

Every OLE batch job exists in an "unscheduled" version which can be initiated manually at any time. Therefore when you look at the search results for each scheduled job, there are two results shown: one result is in the job group scheduled, and one result is in the job group unscheduled.

There are two ways to initiate a batch job: "running" and "scheduling"

Running: You can either Run a job immediately, or at a specified date/time. If you add a time and click "run", no second job is created; the job remains in the "unscheduled" Job Group although the Job Status changes to "Scheduled".

Note

For information about how to run a job, see the Running Section below.

Scheduling: Clicking "schedule" (under Other Commands) instead of "run" adds a second version of the job in the batch job lookup, in the Scheduled job group. You don't specify a date/time for a scheduled job (if you type one in and then click "schedule", OLE just ignores the date/time.) Instead, the timing is controlled by a specific job called "scheduleJob". Its function is to run all the other jobs in the Scheduled job group. It reads the dependencies listed for each job it runs, so it can run them in the right order.

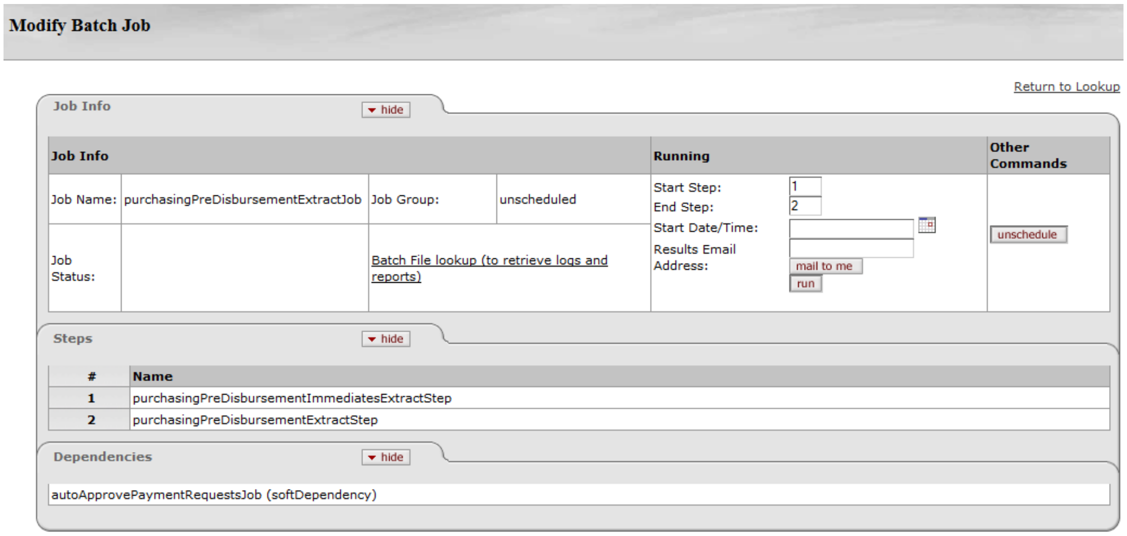
Note

OLE comes with a cron job that controls the running of the job "scheduleJob". The cron job is not accessible through the UI, however it is accessible through the server. The default setting is to run the jobs daily, at 11:00 PM. You could modify the cron job to run multiple times per day but this has not been tested and it may affect system performance. Instead, if there are particular jobs you wish to run (such as to update the GL immediately), you could run these jobs ad hoc.

Click the **Modify** link to open the Modify Batch Job maintenance e-doc.

Document Layout

From the Modify Batch Job e-doc, you can run the standard scheduler.



Note

When the server is restarted, the **Job Info** values revert back to the original setting unless the configuration is changed.

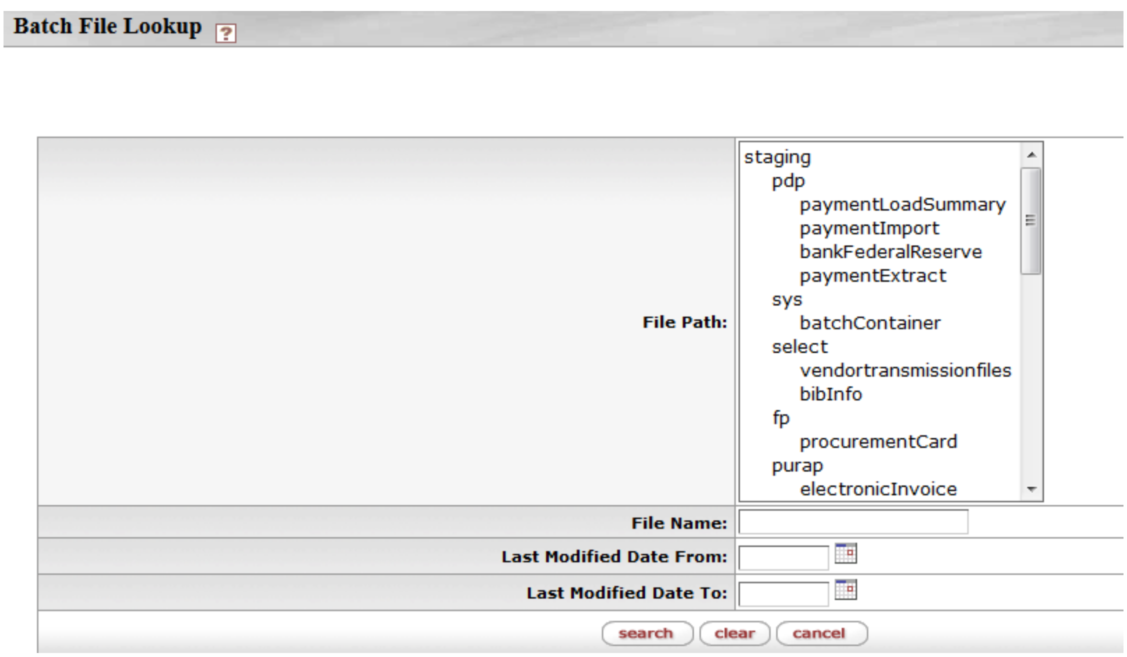
This e-doc contains the **Job Info** tab, the **Steps** tab, and the **Dependencies** tab.

Job Info Tab

The **Job Info** tab displays the basic information about the job and allows you to schedule or unscheduled the job. The **Job Info**tab includes three sections: **Job Info**, **Running**, and **Other Commands**.

Job Info Section

In addition to listing the basic information about the job, clicking the Batch File Lookup URL takes you to the Batch File Lookup screen where you may view logs and reports generated by batch jobs.



Note

To learn more about the Batch File Lookup screen, see Batch File

Running Section

The **Running** section allows a user to control a job schedule. When the user has appropriate access, the Running section displays information necessary to schedule a job.

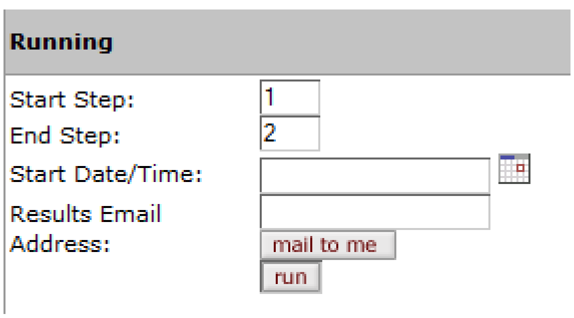
By default, when clicking the run button, the system runs all steps of the job immediately or you may schedule the job to start at the specified date and time.

Note

These parameters can be modified to only run a subset of steps on a job (shown in the **Steps** tab).

Warning

When manually running a job, job dependencies are not considered. Caution should be exercised that all necessary data that are normally added by the prerequisite jobs are set up to ensure a successful job run.



If you want to receive an email after the job completes, fill in the email address field or click the **Mail to Me** button to populate the email address from your user profile into the field. Otherwise, an email will be sent only on job failure, and it will be sent to the batch mailing list.

Other Commands Section

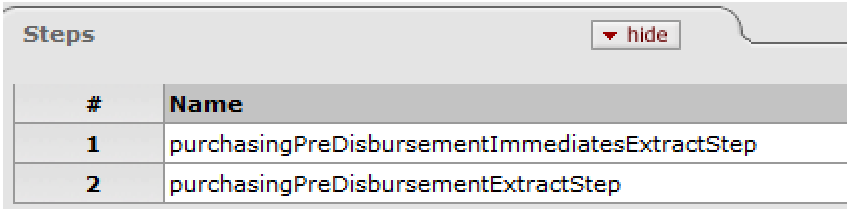
You may issue the following commands from this section:

- Click 

 to remove the job from the scheduled group. Clicking 'Unschedule' will remove the job from the scheduled group even if you are viewing an unscheduled version of the job when you click it.
- If a job is currently running, you can request that it be interrupted. This does not guarantee an immediate stop.

Steps Tab

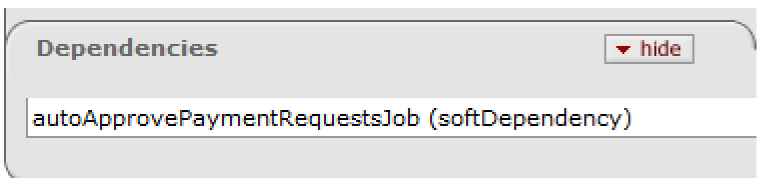
The **Steps** tab displays all the steps that make up this batch job. Steps are displayed in the order they are performed.



Dependencies Tab

The **Dependencies** tab displays all the other jobs on which the scheduled version of the current job depends. Batch jobs can have hard or soft dependencies. A soft dependency means that this job will not run until that dependent job has completed, but will run regardless of whether or not the job it depends on completed successfully. A hard dependency indicates that the job must not only complete before this job runs but it must complete successfully.

Note that you can run an unscheduled job without regard to the specified dependencies. The job will run automatically when the **run** button is clicked.



Tentative List of Select and Acquire jobs to be scheduled

Note

This list is a work in progress.

accountTemporaryRestrictedNotifyJob

approveLineItemReceivingJob

autoApprovePaymentRequestsJob

autoClosePurchaseOrdersJob

autoCloseRecurringOrdersJob

autoDisapproveJob

clearPendingEntriesJob

closeJob

collectorJob

disbursementVoucherPreDisbursementProcessorExtractJob

electronicInvoiceExtractJob

enterpriseFeedJob

faxPendingDocumentJob

nightlyOutJob

nominalActivityClosingJob

pdpClearPendingTransactionsJob

pdpDailyReportJob

pdpExtractAchPaymentsJob

pdpExtractCanceledChecksJob

pdpExtractGlTransactionsStepJob

pdpInactivatePayeeAchAccountsJob

pdpLoadFederalReserveBankDataJob

pdpLoadPaymentsJob

pdpNightlyLoadPaymentsJob

pdpSendAchAdviceNotificationsJob

populatePriorYearDataJob

posterBalancingJob posterJob

processPdpCancelsAndPaidJob

procurementCardDocumentJob

purchasingPreDisbursementExtractJob

purgeJob

purgeReportsAndStagingJob

receivingPaymentRequestJob

scheduleJob

scrubberJob

sufficientFundsAccountUpdateJob

To run GL jobs ad hoc, this is the list of jobs. They must be ran in order, to make sure the dependencies work. (Sites might want to do this at the very end of the fiscal year, for instance, in order to see expenditures update several times a day.)

enterpriseFeedJob

nightlyOutJob

collectorJob

sufficientFundsAccountUpdateJob

scrubberJob

pdpClearPendingTransactionsJob

posterJob

posterBalancingJob

clearPendingEntriesJob

processPdpCancelsAndPaidJob

purchasingPreDisbursementExtractJob

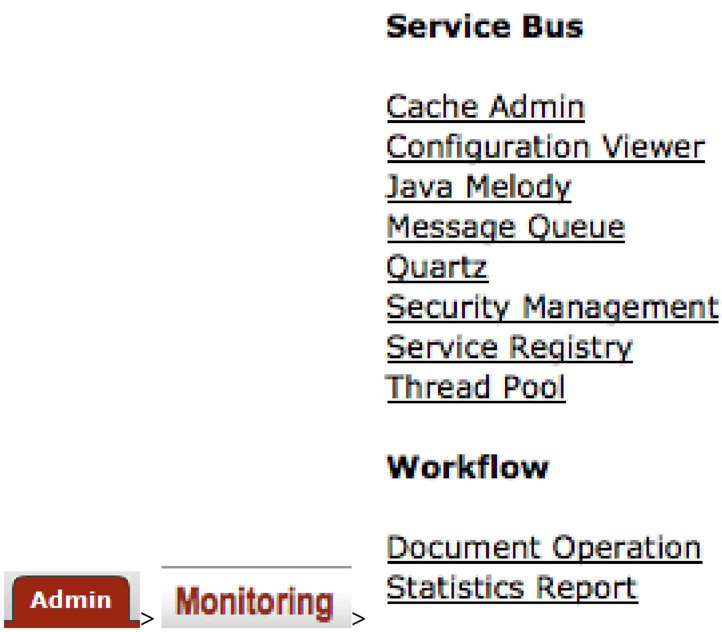
disbursementVoucherPreDisbursementProcessorExtractJob

pdpNightlyLoadPaymentsJob

Special Batch File Upload

Admin > Batch Processes > OLE FS Batch > Special Batch File Upload > Batch File Lookup

Chapter 2. Monitoring Administrative Documents

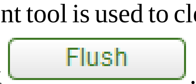


The items in the Monitoring submenu pertain to the Kuali Service Bus and the Kuali Enterprise Workflow (KEW) as well as the Application Server.

An Enterprise Service Bus is a middleware architecture construct which allows for integrating enterprise applications in an implementation-independent fashion. The Kuali Service Bus (KSB) specifically provides a messaging fabric as well as allowing acquisition of services on the bus using a service registry and invocation of those services using various protocols (java serialization over HTTP and SOAP). Because these are primarily technical operations, they are not covered in great detail here.

Use of these options is restricted to users with the KR-SYS Technical Administrator role.

Cache Management

The Cache Management tool is used to clear all or individual local system caches. Users may select specific or all caches and click 

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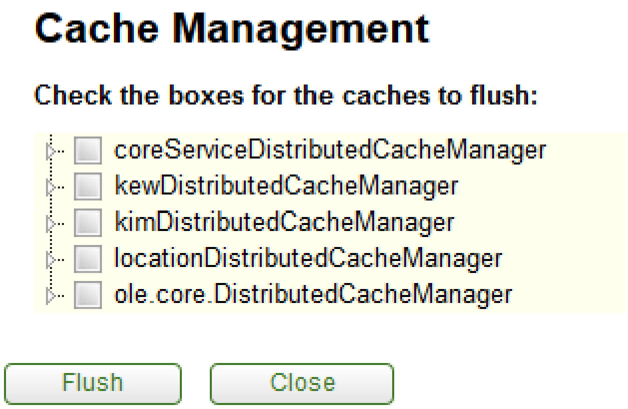
Tip

Click the arrow on the left of the checkbox to expand the list.

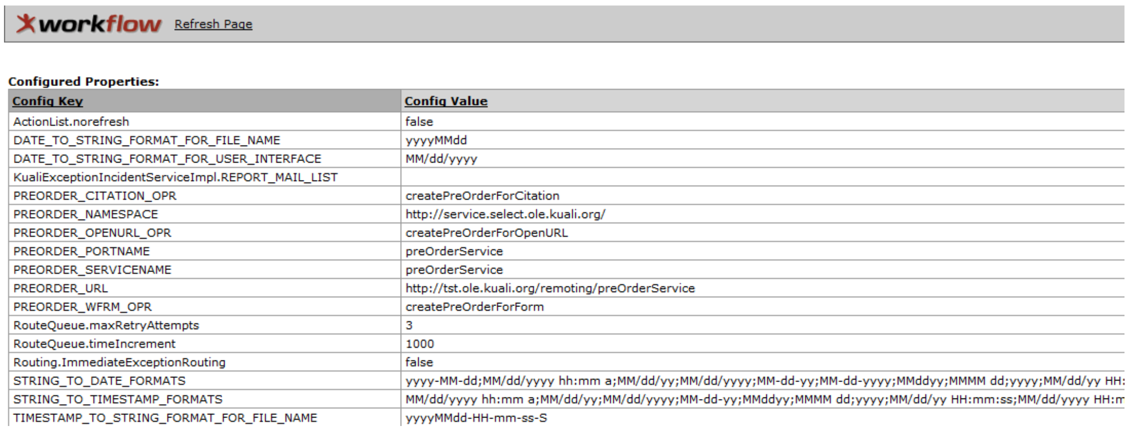
Document Layout



Configuration Viewer

The Configuration Viewer is used to review a table of configured properties. Click **Refresh Page** to update the values.

Document Layout


workflow Refresh Page

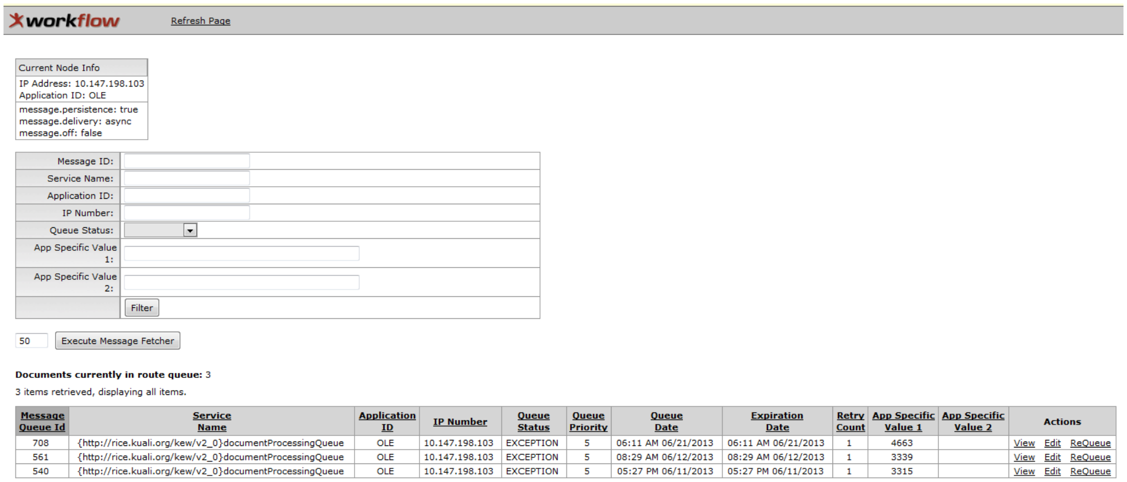
Configured Properties:

Config Key	Config Value
ActionList.norefresh	false
DATE_TO_STRING_FORMAT_FOR_FILE_NAME	yyyyMMdd
DATE_TO_STRING_FORMAT_FOR_USER_INTERFACE	MM/dd/yyyy
KualiExceptionIncidentServiceImpl.REPORT_MAIL_LIST	
PREORDER_CITATION_OPR	createPreOrderForCitation
PREORDER_NAMESPACE	http://service.select.ole.kuali.org/
PREORDER_OPENURL_OPR	createPreOrderForOpenURL
PREORDER_PORTNAME	preOrderService
PREORDER_SERVICENAME	preOrderService
PREORDER_URL	http://tst.ole.kuali.org/remoting/preOrderService
PREORDER_WFRM_OPR	createPreOrderForForm
RouteQueue.maxRetryAttempts	3
RouteQueue.timeIncrement	1000
Routing.ImmediateExceptionRouting	false
STRING_TO_DATE_FORMATS	yyyy-MM-dd;MM/dd/yyyy hh:mm a;MM/dd/yy;MM/dd/yyyy;MM-dd-yy;MM-dd-yyyy;MMddyy;MMMM dd;yyyy;MM/dd/yy HH:
STRING_TO_TIMESTAMP_FORMATS	MM/dd/yyyy hh:mm a;MM/dd/yy;MM/dd/yyyy;MM-dd-yy;MMddyy;MMMM dd;yyyy;MM/dd/yy HH:mm:ss;MM/dd/yyyy HH:m
TIMESTAMP_TO_STRING_FORMAT_FOR_FILE_NAME	yyyyMMdd-HH-mm-ss-S

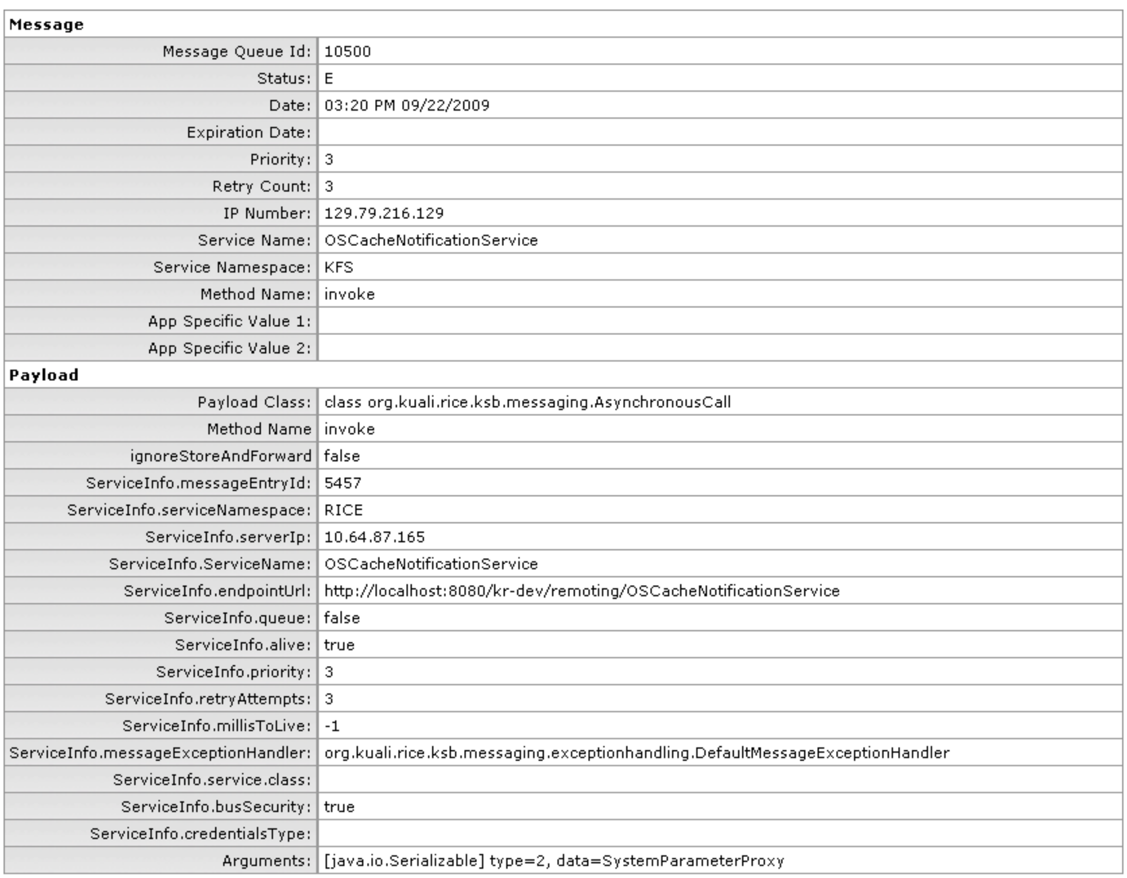
Java Melody

Message Queue

The Message Queue allows administrators to monitor messages that are flowing through the Service Bus. Messages can be edited, deleted or forwarded to other machines for processing from this screen.



Message Queue Id	Service Name	Application ID	IP Number	Queue Status	Queue Priority	Queue Date	Expiration Date	Retry Count	App Specific Value 1	App Specific Value 2	Actions
708	{http://rice.kuali.org/kew/v2_0}documentProcessingQueue	OLE	10.147.198.103	EXCEPTION	5	06:11 AM 06/21/2013	06:11 AM 06/21/2013	1	4663		View Edit ReQueue
561	{http://rice.kuali.org/kew/v2_0}documentProcessingQueue	OLE	10.147.198.103	EXCEPTION	5	08:29 AM 06/12/2013	08:29 AM 06/12/2013	1	3339		View Edit ReQueue
540	{http://rice.kuali.org/kew/v2_0}documentProcessingQueue	OLE	10.147.198.103	EXCEPTION	5	05:27 PM 06/11/2013	05:27 PM 06/11/2013	1	3315		View Edit ReQueue



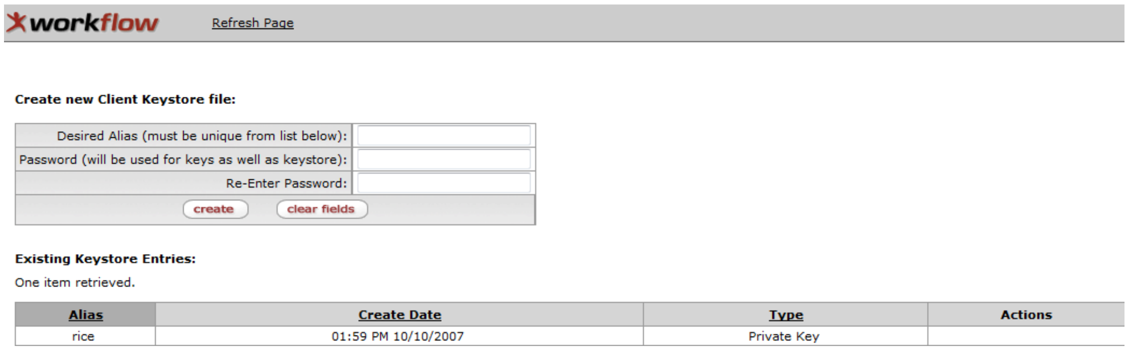
Message	
Message Queue Id:	10500
Status:	E
Date:	03:20 PM 09/22/2009
Expiration Date:	
Priority:	3
Retry Count:	3
IP Number:	129.79.216.129
Service Name:	OSCacheNotificationService
Service Namespace:	KFS
Method Name:	invoke
App Specific Value 1:	
App Specific Value 2:	
Payload	
Payload Class:	class org.kuali.rice.ksb.messaging.AsynchronousCall
Method Name	invoke
ignoreStoreAndForward	false
ServiceInfo.messageEntryId:	5457
ServiceInfo.serviceNamespace:	RICE
ServiceInfo.serverIp:	10.64.87.165
ServiceInfo.ServiceName:	OSCacheNotificationService
ServiceInfo.endpointUrl:	http://localhost:8080/kr-dev/remoting/OSCacheNotificationService
ServiceInfo.queue:	false
ServiceInfo.alive:	true
ServiceInfo.priority:	3
ServiceInfo.retryAttempts:	3
ServiceInfo.millisToLive:	-1
ServiceInfo.messageExceptionHandler:	org.kuali.rice.ksb.messaging.exceptionhandling.DefaultMessageExceptionHandler
ServiceInfo.service.class:	
ServiceInfo.busSecurity:	true
ServiceInfo.credentialsType:	
Arguments:	[java.io.Serializable] type=2, data=SystemParameterProxy

Quartz

Quartz provides a means by which an administrator can schedule delayed tasks, including retry attempts for messages that cannot be sent the first time.

Security Management

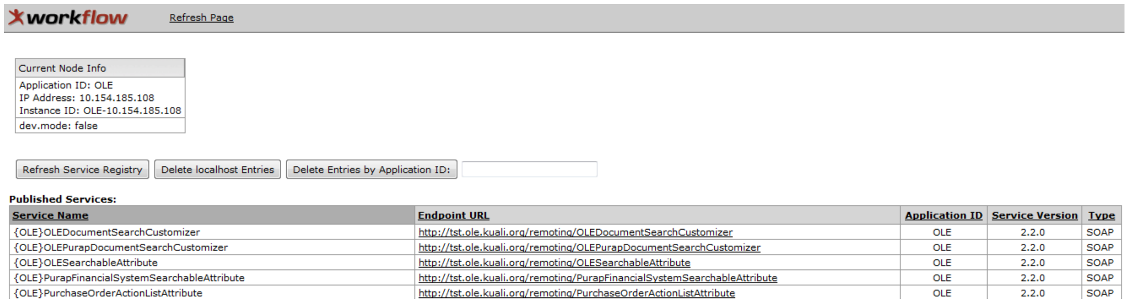
The Security Management provides a means by which an administrator can generate a keystore in the Kuali Service Bus (KSB).



Alias	Create Date	Type	Actions
rice	01:59 PM 10/10/2007	Private Key	

Service Registry

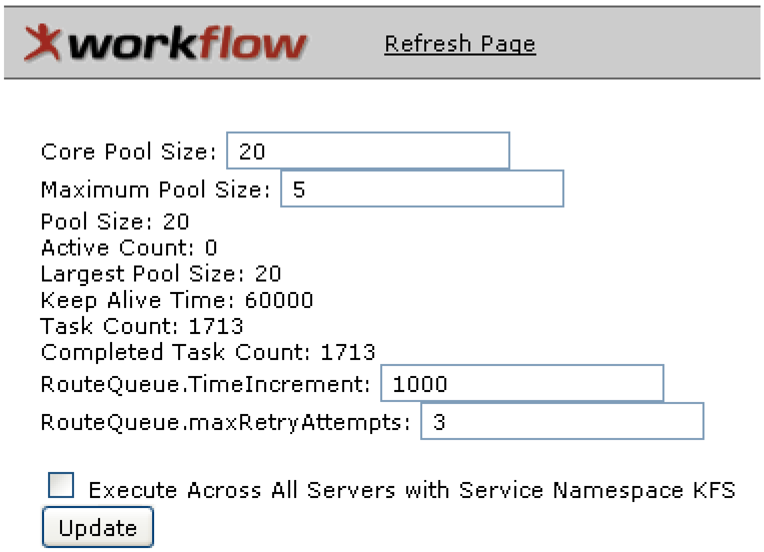
The Service Registry displays a read-only view of the Service Bus's Service Registry. The Service Registry shows all services that are exposed on the Service Bus and includes information about them (such as IP Address, endpoint URL, etc.). The Service Registry also includes an administrative function which allows the administrator to refresh its view of the registry.



Service Name	Endpoint URL	Application ID	Service Version	Type
{OLE}OLEDocumentSearchCustomizer	http://tst.ole.kuali.org/remoting/OLEDocumentSearchCustomizer	OLE	2.2.0	SOAP
{OLE}OLEPurapDocumentSearchCustomizer	http://tst.ole.kuali.org/remoting/OLEPurapDocumentSearchCustomizer	OLE	2.2.0	SOAP
{OLE}OLESearchableAttribute	http://tst.ole.kuali.org/remoting/OLESearchableAttribute	OLE	2.2.0	SOAP
{OLE}PurapFinancialSystemSearchableAttribute	http://tst.ole.kuali.org/remoting/PurapFinancialSystemSearchableAttribute	OLE	2.2.0	SOAP
{OLE}PurchaseOrderActionListAttribute	http://tst.ole.kuali.org/remoting/PurchaseOrderActionListAttribute	OLE	2.2.0	SOAP

Thread Pool

The Thread Pool provides a means by which an administrator can change the size of the Thread Pool used by the Service Bus for processing messages.



Document Operation

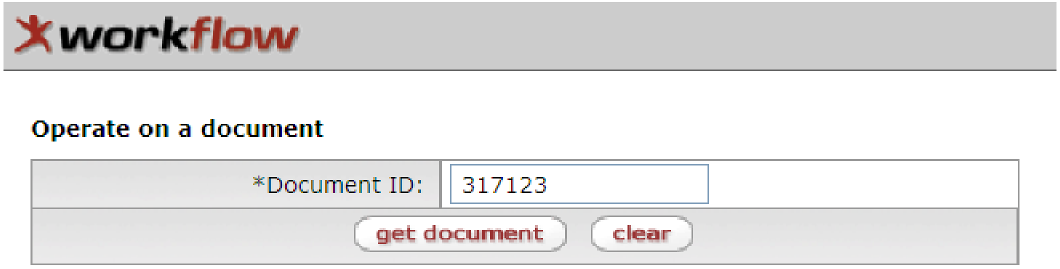
The **Document Operation** screen allows for low-level modifications to document data; users can manually move a particular document to the next step in the workflow, refresh the document, etc.

In certain scenarios or failure cases it may be necessary to make modifications to the document so that the state of the document in the KEW system is consistent with that of OLE. It may also be necessary to make modifications to the XML content of a document if, for example, there is a bug in the application integrating with KEW which results in incomplete or insufficient XML content to allow for proper routing.

Tip

In KFS, Document Operation is restricted to very few users and is used primarily to requeue doucments when a fiscal officer leaves and has things remaining in their Action List. After the account is updated with the new fiscal officer, KFS system admin will requeue the documents and then the system puts them in the new fiscal officer's Action List.

Instead of trying to push documents through the workflow with Document Operation, KFS users try to use Super User instead.

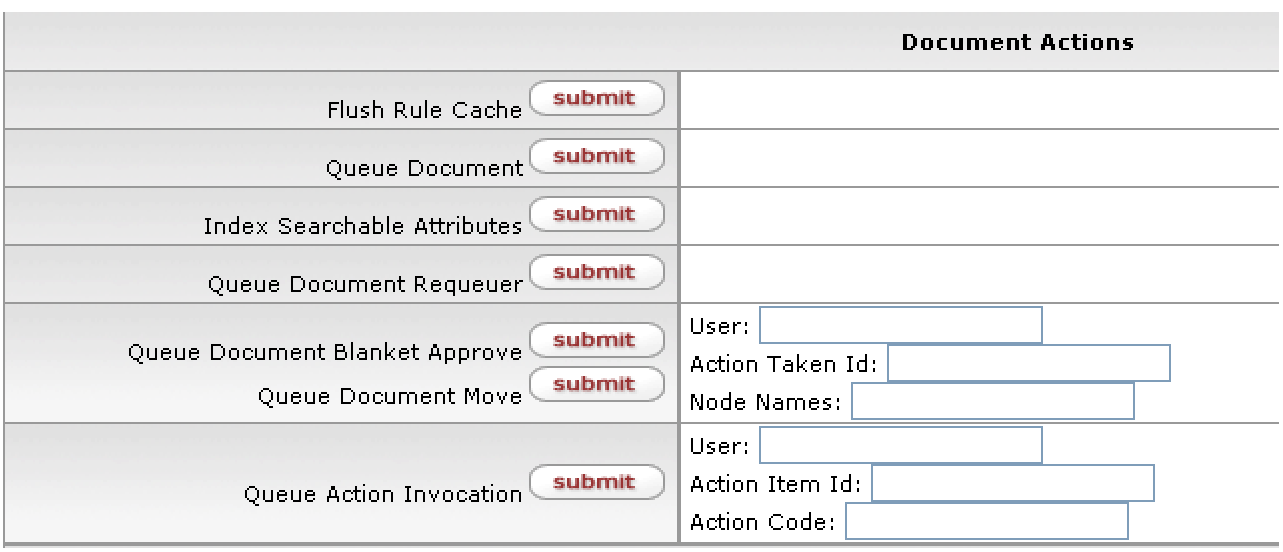


Enter the document ID you are searching for and click get document.

The administrator is then presented with a view of the document and can perform various operations on it. The screen is divided into various sections, including:

- Document Actions - Additional functions for reassigning and reprocessing document
- Document - simple data associated with the document
- Action Requests - the Action Requests associated with the document, includes requests for action which have already been satisfied
- Actions Taken - The actions that have been taken against this document (i.e. Approved by user X)
- Action Items - Items related to this document that are in users' Action Lists
- Route Node Instances - The node instances that form the document's instantiated route path
- Branch States - The branches on this document and the state of those branches
- Annotation - An annotation that will show up on the Route Log when the operation is performed.

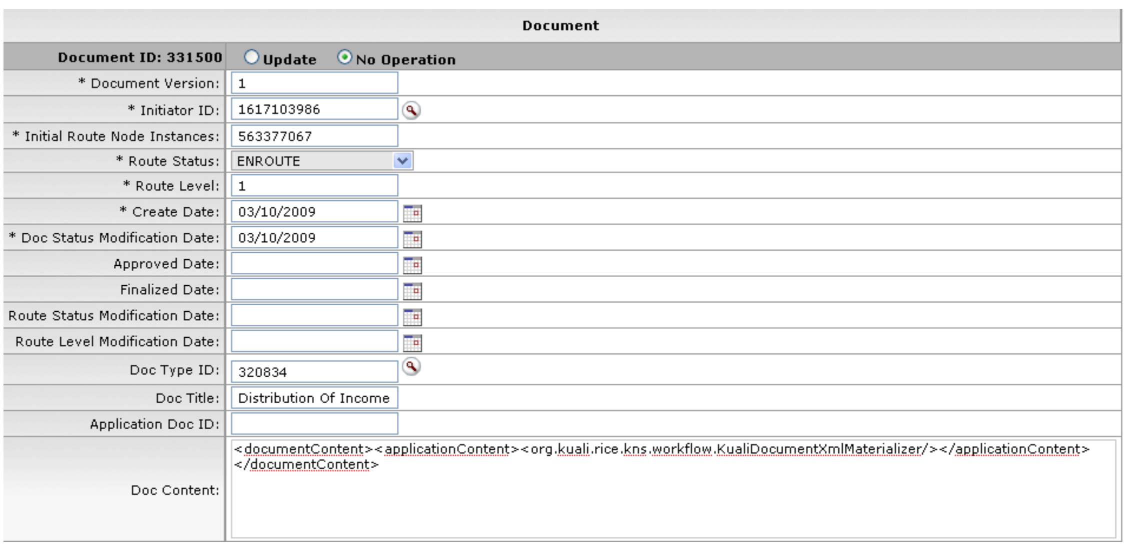
Document Action



Document Action definitions

Title	Description
Queue Document	Requeuing and reprocessing the document by the engine
Index Searchable Attributes	Update searchable data of the document
Queue Document Requeuer	Refresh document and regenerate request of current node
Queue Document Blanket Approve	Move blanket approve document forward; User, Action Taken Id, and Node Names are required • User - Enter initiator's network Id • Action Taken Id - Enter an entry's action taken Id • Node Names - Enter a comma separated list of node names
Queue Action Invocation	Reassign action request based on initiator, entry ID, and action code; User, Action Item Id, and Action Code are required • User - Enter initiator's network Id • Action Item Id - Enter an entry's action item Id • Action Code - A, F, K, or C; A for Approve, F for FYI, K for acknowledge, and C for Complete

Document

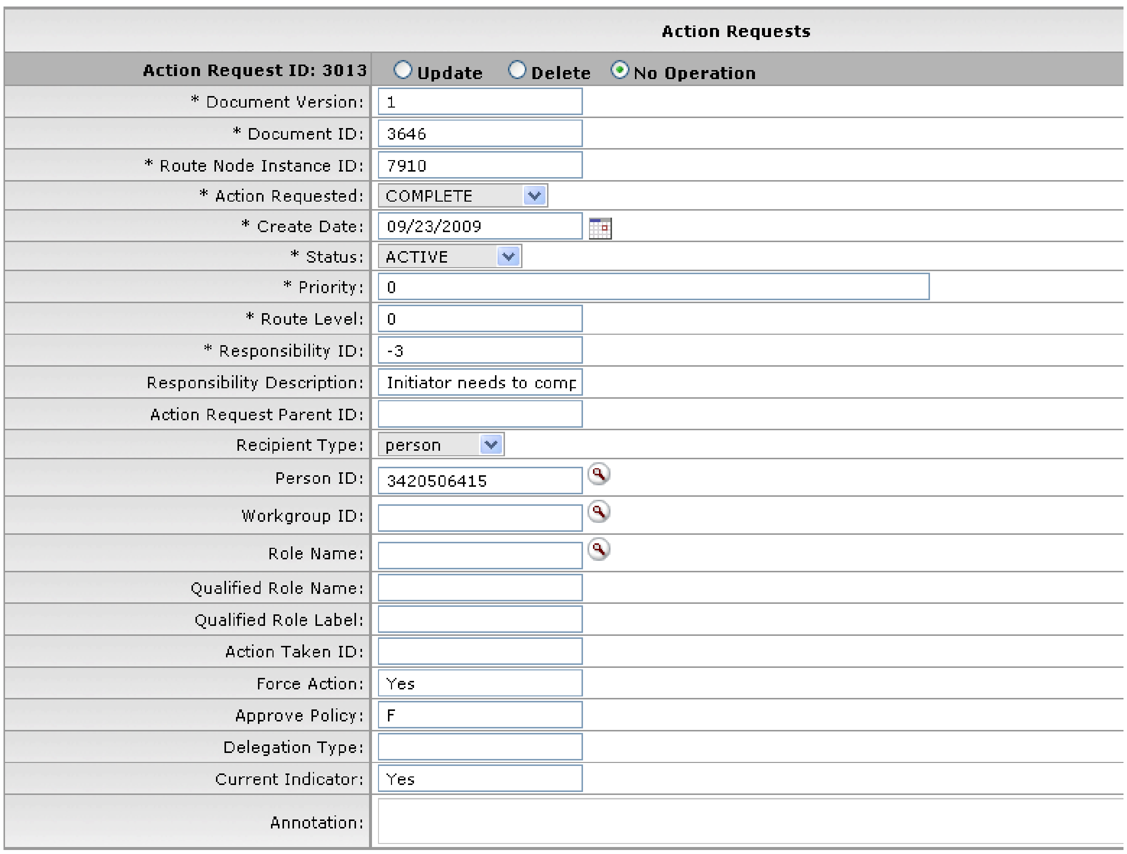


Document definitions

Title	Description
Document Version	A legacy field
Initiator ID	The workflow id of the initiator
Initial Route Node Instances	The ID of the initial route node instance on the document
Route Status	The current status of the document
Route Level	A legacy field providing a numerical representation of where the document is in the route path
Create Date	The initial date the document was created, doesn't not reflect whether the document was routed, saved, etc.

Doc Status Modification Date	The date at which the document's status was last modified
Approval Date	The date at which the document's state transitioned to APPROVED
Finalized Date	The date at which the document's state transitioned to FINAL
Route Status Modification Date	Legacy value, similar to Doc Status Modification Date
Route Level Modification Date	Legacy value, no longer used
Doc Type ID	The ID of the DocumentType definition for this document
Doc Title	The title of the document
Application Doc ID	A special id that can be set by client applications to associate the document to an ID in their system
Doc Content	The XML Content of the document

Action Requests

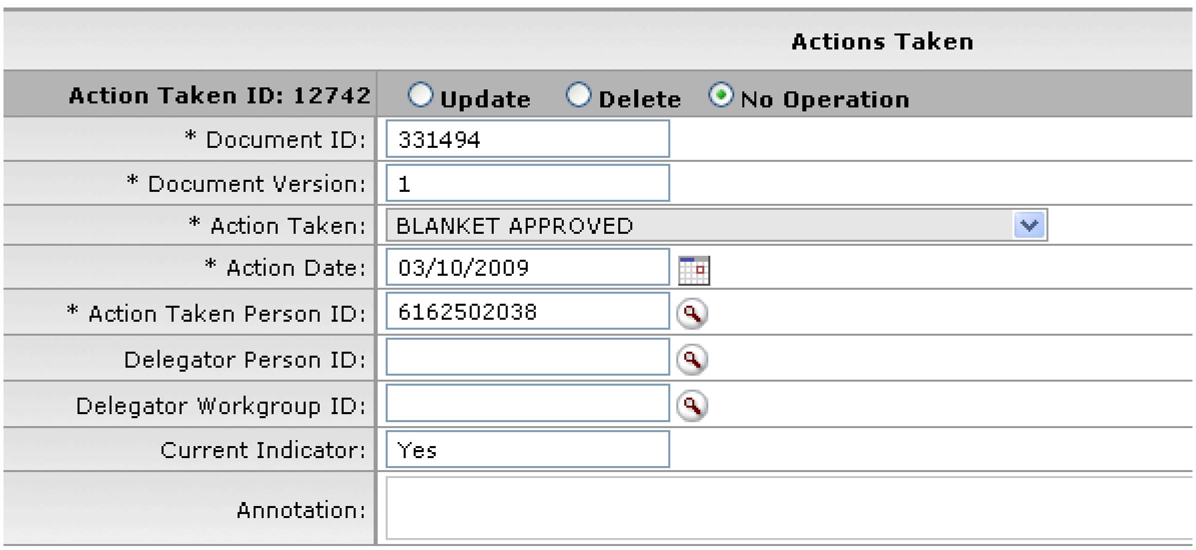


Action Request definitions

Title	Description
Document Version	A legacy field
Initiator ID	The workflow id of the initiator
Route Node Instance ID	The ID of the node instance that this request is attached to
Action Request	The type of action that is requested
Create Date	The date the request was created
Status	The current status of the request

Priority	The activation priority of the request
Route Level	A legacy field providing a numerical representation of where in the route path the request was generated
Responsibility ID	The id of the responsibility associated with this request (relates to Rules and/or Route Modules)
Responsibilty Description	A description of the responsibility of this request
Action Request Parent ID	ID of the parent action request if there is one
Recipient Type	The type of recipient for this request (user, workgroup, or role)
Person ID	If the recipient type is "user", the workflow id of the user recipient
Workgroup ID	If the recipient type is "workgroup", the workgroup id of the workgroup recipient
Role Name	If the recipient type is "role", the name of the role
Qualified Role Name	If the recipient type is "role", the value of the qualified role
Qualified Role Label	If the recipient type is "role", the label for the qualified role
Action Taken ID	If this request has been satisfied, the id of the ActionTaken that satisfied the request
Ignore Previous	The ignore previous indicator of the request
Approve Policy	The approve policy of the request (only used by role requests)
Delegation Type	If the request is a delegation, the type of delegation (primary or secondary)
Current Indicator	Indicates if the request is "Current" or not
Annotation	The value of the annotation on the request

Actions Taken



Actions Taken definitions

Title	Description
Document ID	The ID of the associated document
Document Version	A legacy field
Action Taken	The type of the action that was taken
Action Date	The date at which the action was taken
Action Taken Person ID	The workflow id of the user or delegate who took action

Delegator Person ID	If this action was performed by a delegate, the workflow id of the person whose authority was delegated
Delegator Workgroup ID	If this action was performed by a delegate, the workflow id of the Workgroup whose authority was delegated
Current Indicator	Indicates if the Action Taken is "Current" or not, non-current actions have been revoked by an action such as ReturnToPreviousNode
Annotation	The value of the annotation on the Action Taken

Action Items

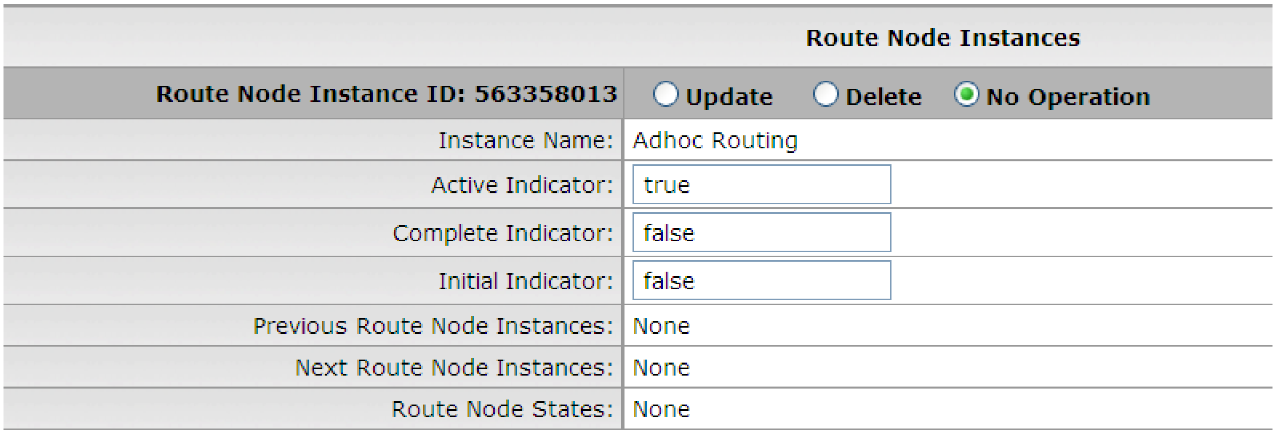
It is important to note that the Action Items is a de-normalized representation of an Action Request on the document that is used to render the Action List in an efficient matter. Therefore, it contains some copies of data from both the document and the request itself.

Actions Items definitions

Title	Description
Document ID	The ID of the associated document
Doc Type Name	The name of the DocumentType for this item
Doc Type Label	The label of the document type
Doc Handler URL	The URL used to access the doc handler for this item
Date Assigned	The creation date of the item
Action Request ID	The ID of the Action Request from which this item is derived
Action Requested	The type of action requested by this item
Responsibility ID	The responsibility id of the associated request
Person ID	The workflow id of the person responsible for the item
Workgroup ID	The workgroup id of the workgroup responsible for the item
Role Name	If the item was derived from a role request, the name of the role
Delegator Person ID	If the item was delegated, the workflow id of the delegating party
Delegator Workgroup ID	If the item was delegated, the workgroup id of the delegating party
Document Title	The title of the document

Route Node Instances

The Route Node Instances are modeled as a Directed Acyclic Graph starting at the node instance pointed to by the Initial Route Node Instances field in the Document section. Therefore, if you delete a route node instance, it will follow all links through its set of Next Route Node Instances and delete those as well.

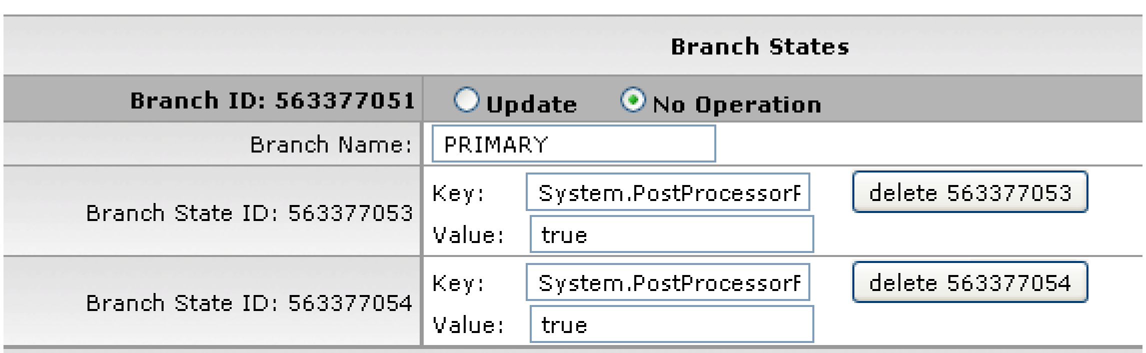


Route Node Instances definitions

Title	Description
Instance Name	The name of the node
Active Indicator	Indicates if the node is active
Complete Indicator	Indicates if the node's processing has completed
Initial Indicator	Indicates if the node has been processed by the engine yet
Previous Route Node Instances	A comma-separated display of the IDs of the previous Route Node Instances of the node
Next Route Node Instances	A comma-separated display of the IDs of the next Route Node Instances of the node
Route Node States	A representation of the state attached to the node

Branch States

All documents are required to have at least one branch that is named PRIMARY. Therefore, it is advisable to not rename the PRIMARY branch.

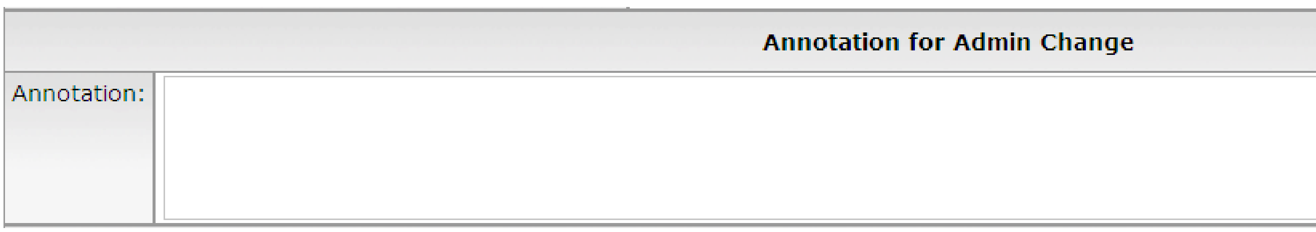


Branch States definitions

Title	Description
Branch Name	The name of the branch
Branch State ID	The ID of that piece of branch state
Branch State Key	The key of the branch state
Branch State Value	The value of the branch state

Annotation

Here you can enter an annotation explaining the changes being made. This will be logged on the Route Log so that it can be preserved as part of the audit trail for the document.



Once the changes have been made on the document operation screen, hit the Save button and the changes will be executed on the server. Remember that in order for a change to take place the appropriate radio button must be selected on the data that requires modification.

Statistics Report

The Statistics Report displays the counts of documents and users for various statuses and categories.

Workflow Statistics

Aggregates

Number of Document Types:	319	
Number of Users:	11	
Number of Active Items In All Action Lists:	269	
Number of Documents Initiated in the Last 30 Days:	OLE_DI	2
	OLE_REQTYPE	1
	ParameterTypeMaintenanceDocument	2
	OLE_PE	3
	OLE_ROOM	1
	OLE_MOTD	1
	OLE_SRYP	1
	OLE_RPTC	2
	OLE_TF	1
	OLE_PMBA	2
	OLE_PREQ	32
	OLE_OBJC	1
	OLE_GSOB	2
	OLE_RCVL	27
	OLE_PO	402
	OLE_PMSN	1
	ParameterMaintenanceDocument	2
	OLE_DV	1
	OLE_PMVC	1
	OLE_SACC	2
	NamespaceMaintenanceDocument	1
	OLE_ACQS	12
	OLE_IB	2
	OLE_PMALST	1
	OLE_SOPT	5
	OLE_ACCT	1
	OLE_PMVT	2
	OLE_PMCA	2
	OLE_PMPT	1
	OLE_FFD	1
	OLE_BA	3
	OLE_PMST	1
	OLE_ACQBTHUPLOAD	22
	OLE_CM	3
	OLE_INVCSBTYP	7
	OLE_PYMNTMTHD	2
	OLE_FLU	1
	OLE_AV	1
	OLE_PMCP	1
	OLE_GACC	1
	CountryMaintenanceDocument	1
	OLE_APRD	1
	OLE_ORDQU	5
	IdentityManagementGroupDocument	1
	OLE_PVEN	12
	OLE_REQS	352
	OLE_CR	4
	DocumentTypeDocument	78
	OLE_OSTY	1
	OLE_CSPR	2
	OLE_INVCTYP	1
	ComponentMaintenanceDocument	2
	OLE_CCTY	1
	CountyMaintenanceDocument	1
	OLE_CCR	1

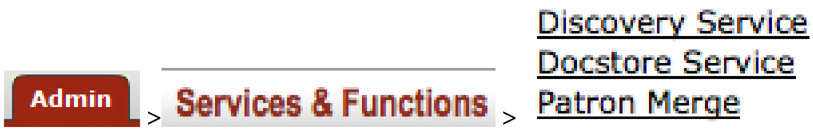
Date Range

Begin Date: 01/01/1900 End Date: 01/01/2400

Routing Status	Number of Documents for Date Range
CANCELED:	0
DISAPPROVED:	0
ENROUTE:	19
EXCEPTION:	0
FINAL:	425
INITIATED:	540
PROCESSED:	1
SAVED:	35

refresh cancel

Chapter 3. Services and Functions Administrative Documents



Discovery Service

The Discovery Service allows users to search the DocStore database and test the RESTful API and SOLR Indexing.

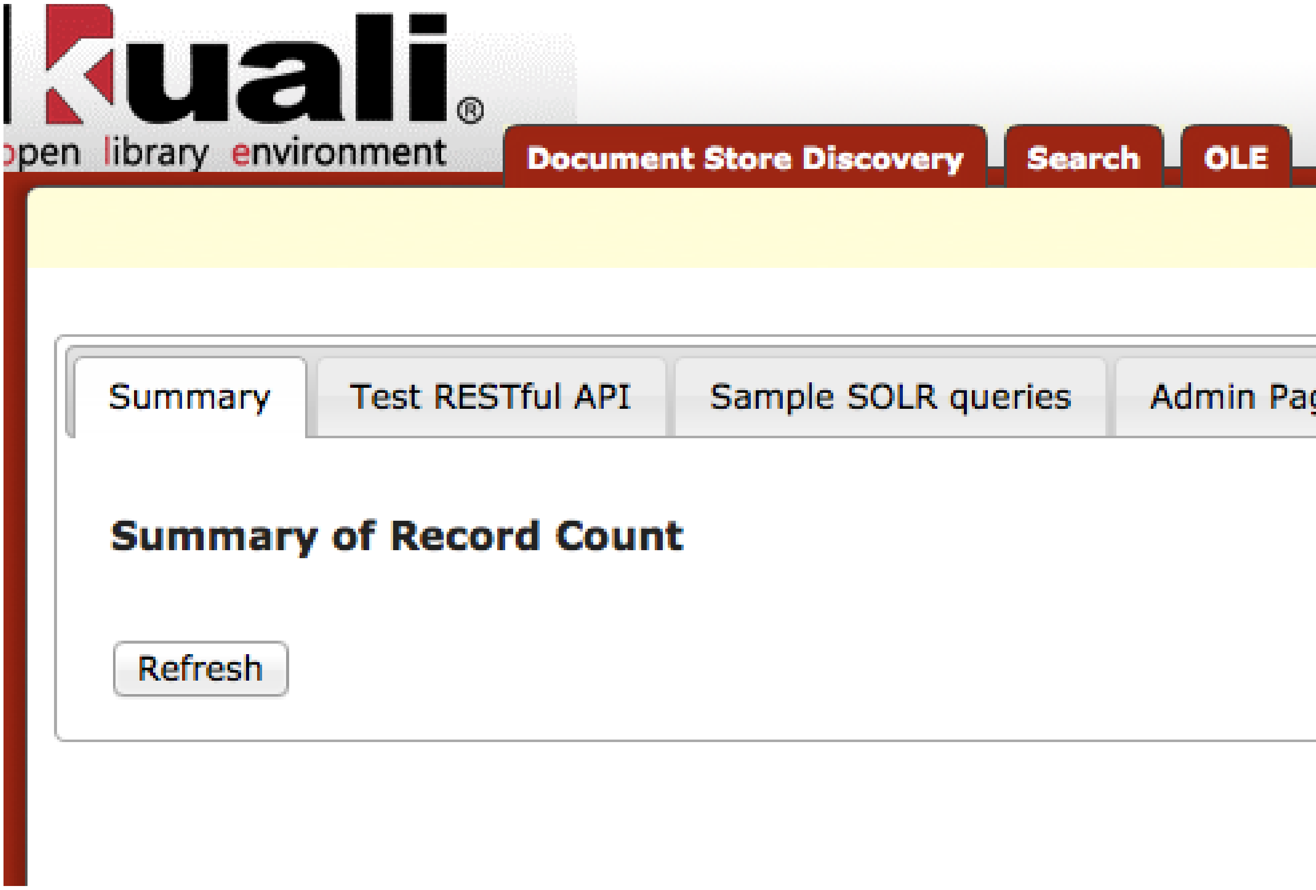
Note

In order to index and reindex bibliographic, holdings, e-holdings, and item records in Solr, go to http://demo.docstore.ole.kuali.org/admin.jsp (or http://tst.docstore.ole.kuali.org/admin.jsp if you are in the tst environment).

Click the **Start** button.

Click **Show Status** button to see the status.

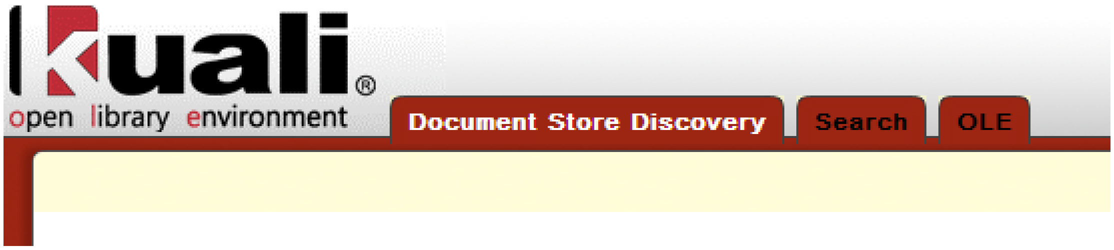
Indexing is complete when you see the "Index End Time"



The Grey tabs are explained here:

- **Summary** tab: Shows the summary of record count for each category, type and format
- **Test RESTful API** tab: Allows users to test the Get and Delete methods of the REST web services.
- **Sample SOLR queries** tab: Displays some sample queries' data for SOLR.
- **Admin Pages** tab: Contains administrative links for SOLR.

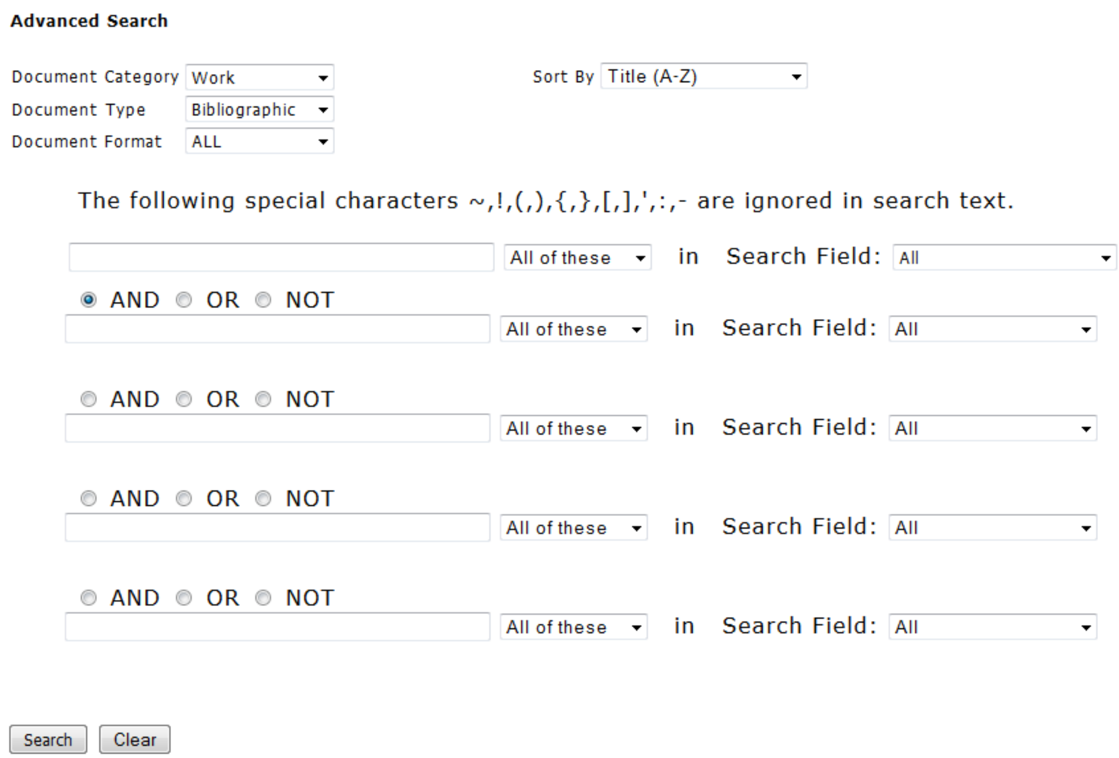
Click the **OLE** tab to return to OLE's main portal.



Document Store Search

Performing a Document Store Search

From the **Search** tab, bibliographic data in the DocStore can be searched in a variety of ways. Select options from the drop down menus and enter information to refine the search.



Advance Search Field Definitions

Title	Description
Document Category	General category of documents being searched. **Note** Work is the only valid category in 1.5
Document Type	Type of documents associated with a category. For the category **Work**, these include bibliographic, licenses, Instances, items, etc.
Document Format	Limits searches to a specific data format (i.e., MARC, Dublin Core). Defaults to **ALL**.
Sort By	Sorts the records by title, author, publication date, and relevance

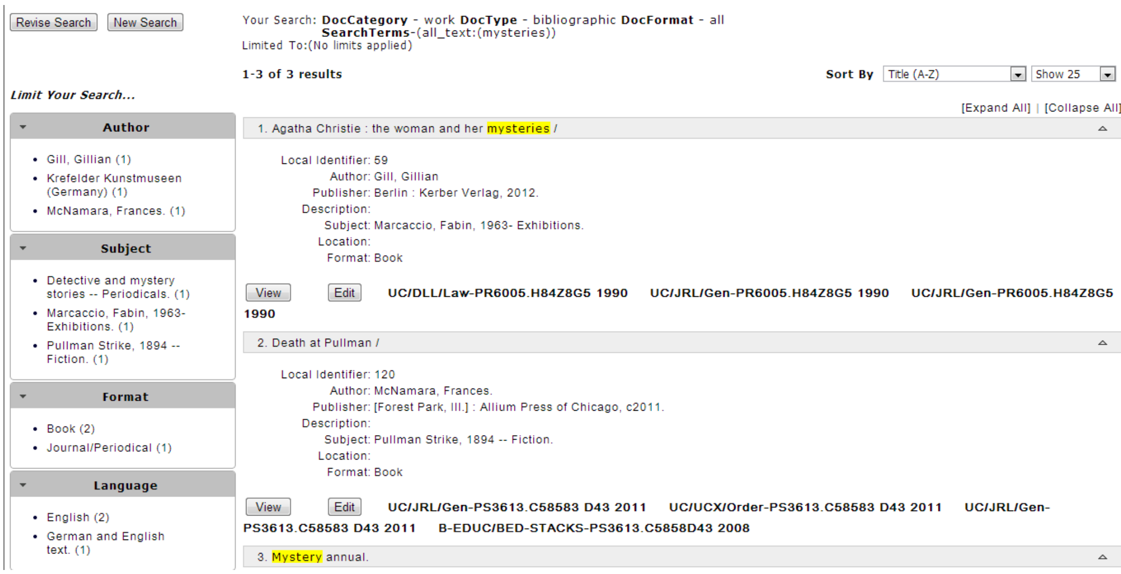
Five search lines are provided in the Document Store Discovery Layer. Standard Boolean operators (AND, OR, NOT) can be chosen to combine the search terms. Truncation is not automatic in OLE 1.0; the truncation symbol is an asterisk. An asterisk can also be used as a wildcard character within a word.

Note

Known bug: Special characters such as ‘&’ and ‘:’ are not recognized when searching.

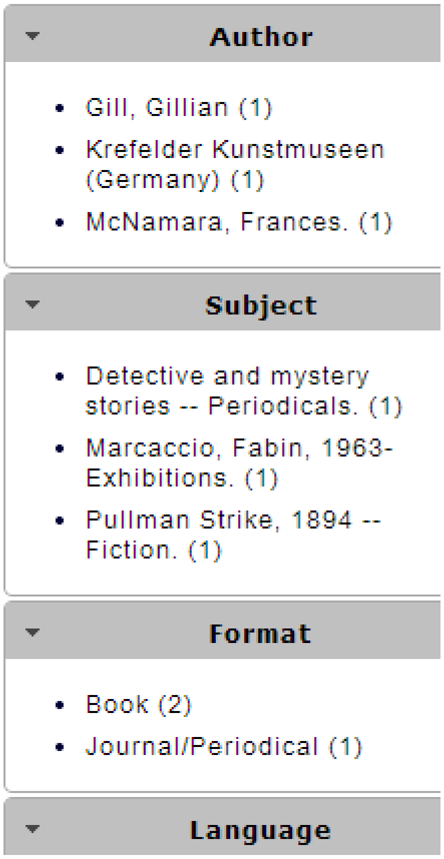
A default sort for the result set can be specified from either the search or the results screen. After all search and sort parameters are entered, click 

.

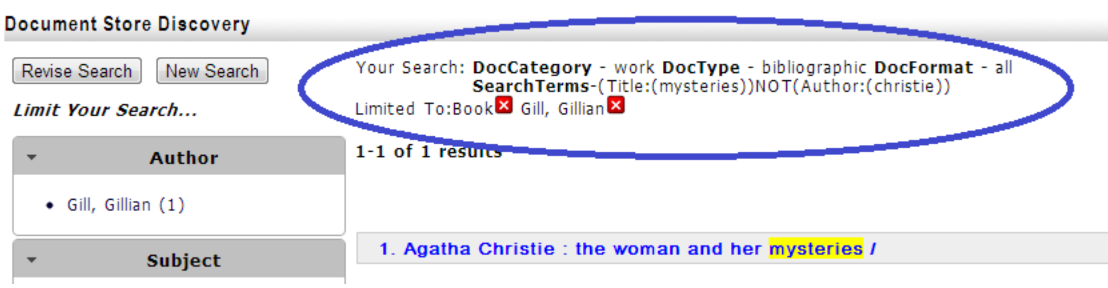


A short selection of fields from the bibliographic data is displayed for each title.

To refine your search, you can use the **facets** on the left-hand side of the results screen:



Clicking on these returns a smaller, more limited search result set. Clicking on more than one facet reduces the result set even further. The facets being used for limiting results are shown at the top of the results index:



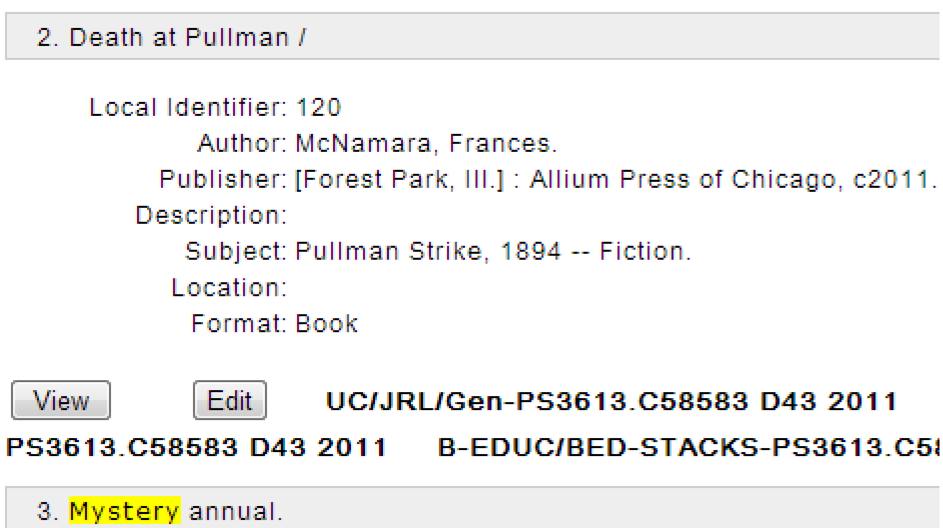
To remove a limit, click on the red **[x]** next to it.

The search results are then re-displayed with that limit removed.

If you need to see more titles on a screen, each entry can be collapsed to show only its titles. All entries can be collapsed at once by using the **Collapse All** link in the upper right:

To view more results you may slide or click on the search bar, type in a page number, or hover your mouse near the left of the **Selected page** field to use the up/down arrows. You will then need to click **Go to page**.

OLE is designed to search data in a variety of formats. OLE contains bibliographic data in MARC and Dublin Core formats, both stored in XML. The record format is shown at the bottom of the bibliographic information.



Just below the bibliographic details for each title are links to the XML versions. Click  to open an XML version of the record in a new window or browser tab:

This XML file does not appear to have any style information associated with it. The document tree is shown below.

```
- <OAI-PMH xsi:schemaLocation="http://www.openarchives.org/OAI/2.0/ http://www.openarchives.org/OAI/2.0/OAI-PMH.xsd">
  – <ListRecords>
    – <record>
      – <header>
          <identifier>oai:quod.lib.umich.edu:MIU01-010759290</identifier>
          <datestamp>2011-09-27T01:37:45Z</datestamp>
          <setSpec>hathitrust:pd</setSpec>
        </header>
      – <metadata>
        – <oai_dc:dc xsi:schemaLocation="http://www.openarchives.org/OAI/2.0/oai_dc/ http://www.openarchives.org/OAI/2.0/oai_dc.xsd">
          – <dc:title>
              Going public : what writing programs learn from engagement / edited by Shirley K Rose, Irwin Weiser.
            </dc:title>
          – <dc:subject>
              English language--Study and teaching (Secondary)--United States.
            </dc:subject>
            <dc:subject>Language arts (Secondary)--United States.</dc:subject>
            <dc:description>259 p. ;</dc:description>
            <dc:publisher>Logan, Utah : Utah State University Press,</dc:publisher>
            <dc:date>2010.</dc:date>
```


Click Edit to open the Bibliographic Editor.

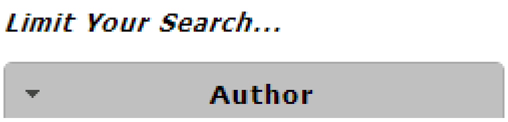
Note

For more information about the bibliographic editor, see the Editors section of the *Guide to the Describe and Manage Module*.

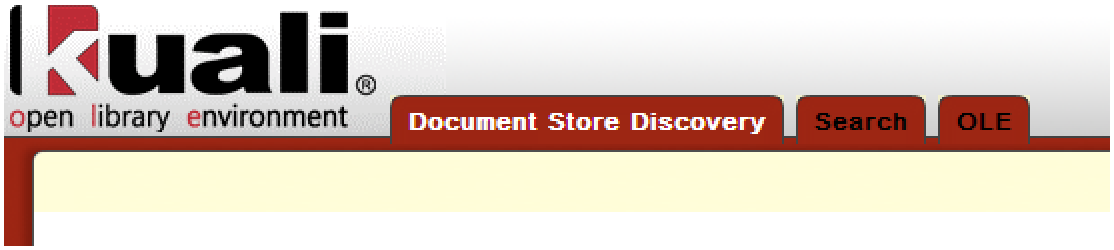
Note

Note: The View and Edit buttons will most likely change in future releases.

At any time, you may choose to revise your search or start a new search. These options are located at the top left side of the results screen.



Click the **OLE** tab to return to OLE's main portal.



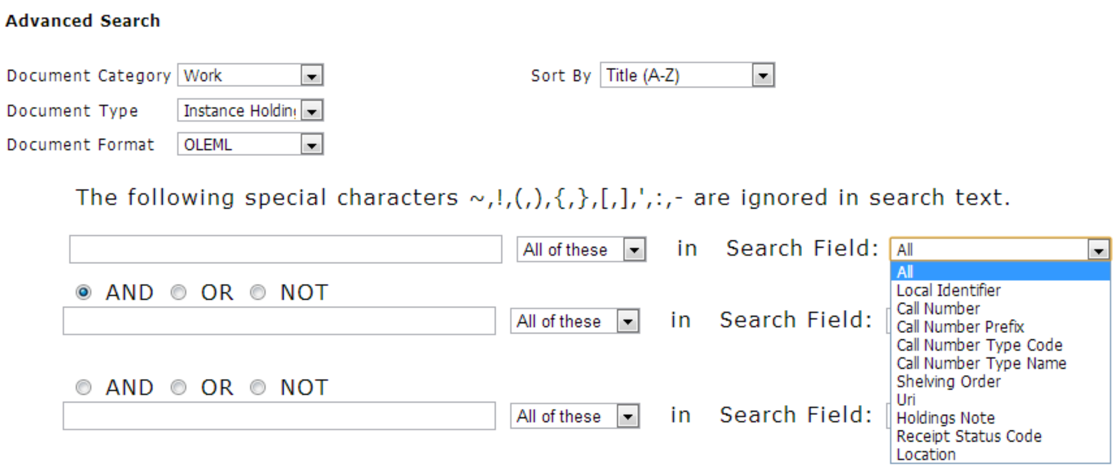
OLE Instance Searching

Some bibliographic search results may include link(s) to one to many Instance (with Holding) and Item records, for those created during acquisitions or as part of OLE sample data:

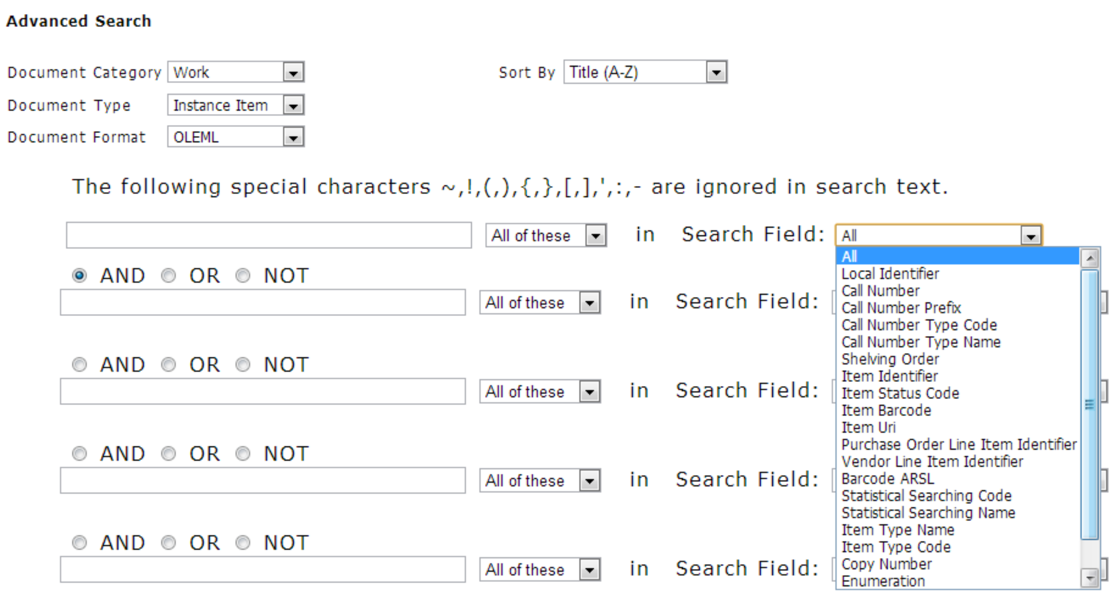
You may select the **call number** link to see the Instance metadata, or link from it to further Holding or Item(s) data. There is limited data in the Item records that have been added to the Document Store. To return to the Bibliographic description, click the **Title** link.

To return to your search results, use your browser's navigation.

At present, users only have the **Search Field** option "source" available when searching Instance documents, but can further search Holdings data like below:



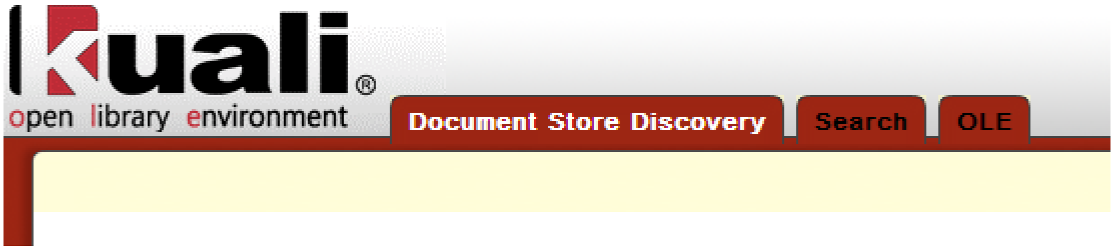
Or further, test searching on Item data.



Facets for Holdings and Item data (such as location, call number sorting, etc.) will be designed and released in the future.

Notes and Tips on Bib, Instance and Item searching

- Breadcrumbs are planned for a later release, for now you can navigate through the DocStore but will want to make note of where you have been if you want to return to the same record.
- If you use multiple words in your search, only one gets highlighted in the search results, and it’s the first word that appears in the document (not the first word in your list of search terms).
- If you search for a word in plural form, OLE will show results for the singular form as well.
- Click the **OLE** tab to return to OLE's main portal.



Click View to see Instance, Holdings or Items in their raw XML form. OLE will generate new Instance/Holding/Item documents during the Import or Load process or during Requisition-to-Purchase Order creation. You may also create and edit Instances through the Instance Editor.

Note

For more information about the Instance editor, see the Instance Editor section of the *Guide to the Describe and Manage Module*.

DocStore Service

Admin > Services & Functions > Docstore Service

The functionality of Docstore is mostly used by other processes like OLE. However, for demonstration and testing docstore, this screen is provided with different functions of docstore and information about docstore.

- **Ingest**: Allows storing of documents in the document store. The input should be a Request XML with a standard schema and returns the Response XML with a list of ingested UUIDs.
- **Check-in**: Check-in functionality allows to modify the content and metadata (additional attributes) of a document identified by its UUID (Universally Unique Identifier).
- **Check-out**: This operation retrieves the content of a document given its UUID.
- **Batch Delete**: Delete records from DocumentStore based on UUIDs.

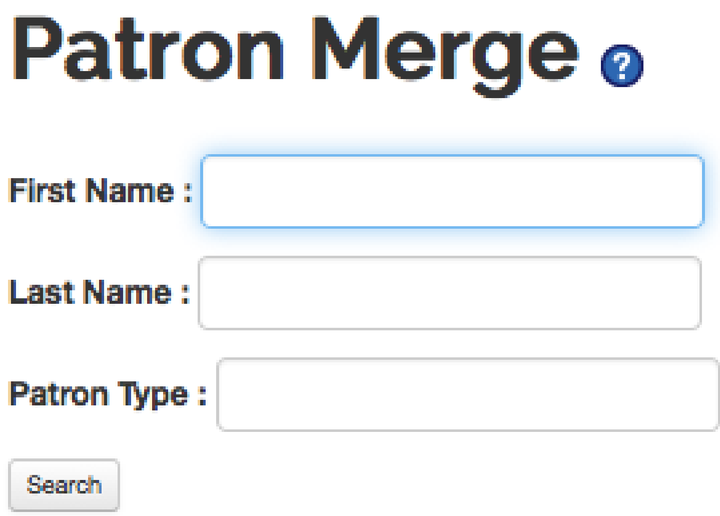
Patron Merge

Admin > Services & Functions > Patron Merge >

Patron Merge

Patron Merge is used to merge two or more patron records online. Patron Merge allows a duly-authorized operator to display all records to be merged. Any records of any kind linked to a duplicate record(s) will be relinked to the survivor record.

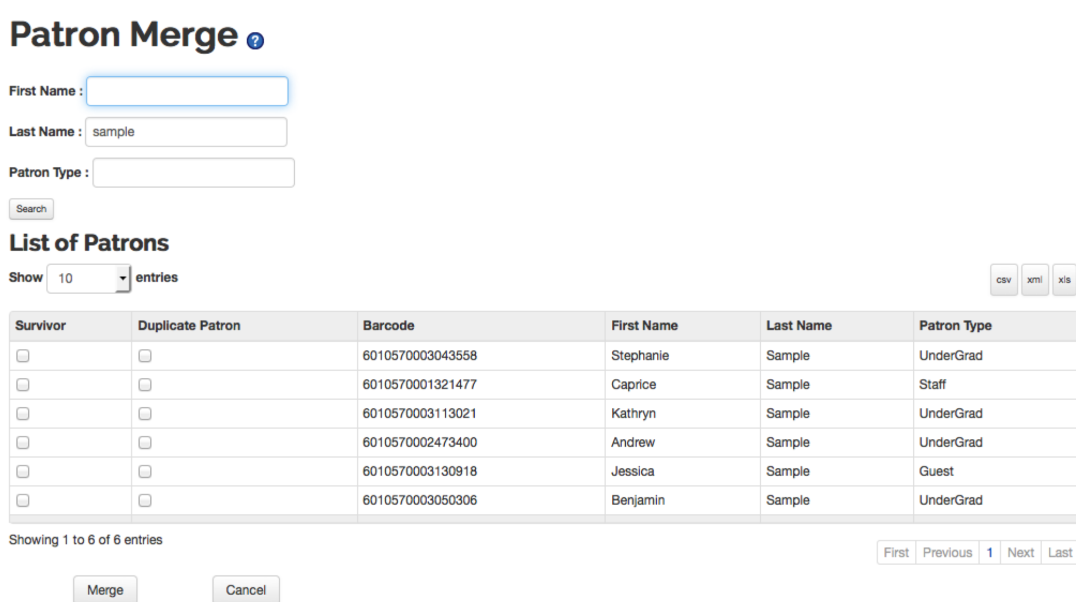
Process Overview



1. From the **Patron Merge** screen, search for the patron by **first name**, **last name** and/or **patron type**

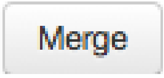
2. Click 

   A list of persons will appear below the search.



3. Select the **Survivor**, the record that will remain.

4. Select the **Duplicate Patron(s)** that will be added to the survivor record.

5. Click 

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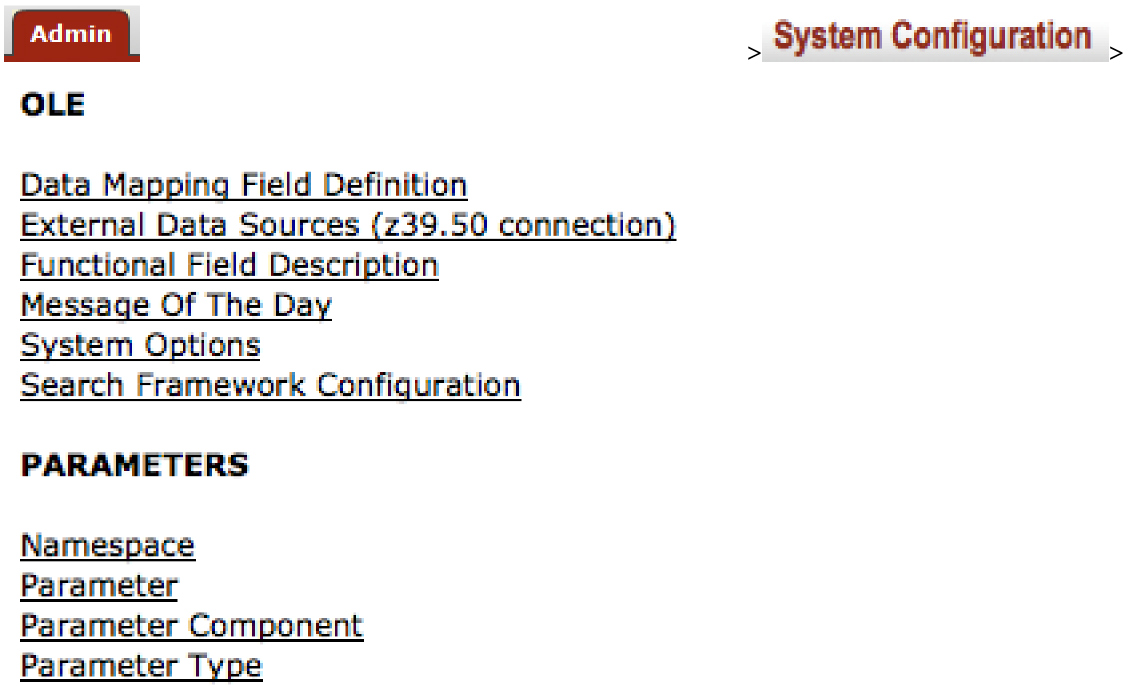
Chapter 4. System Configuration Administrative Documents



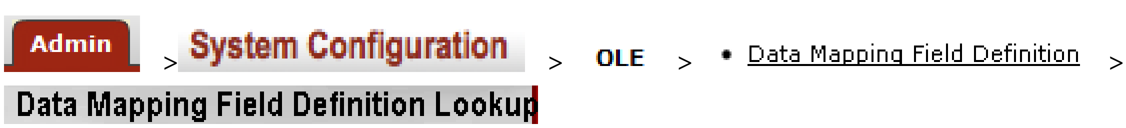
The **System Configuration** submenu allows you to perform a variety of functional and technical activities that affect the entire system.

The **OLE** configuration submenu group provides access to high-level configuration options available to functional users. These include functions that allow authorized users to maintain the message of the day and various parameters and business rules, define many high-level definitions of a fiscal year, and perform other functions that affect users and transactions throughout the system. Some functions are only lookups, such as the ability to view data mapping fields and others are inquire screens like the Routing & Identity Management Document Type Hierarchy.

The options in the **Parameters** submenu group are used primarily by technical users to upload and configure data to maintain the Kuali Enterprise Workflow (KEW) system. Because these two options are intended for technical users, they will not be dealt with in detail here.

Use of these options is restricted to users with the KR-SYS Technical Administrator role.

Data Mapping Field Definition

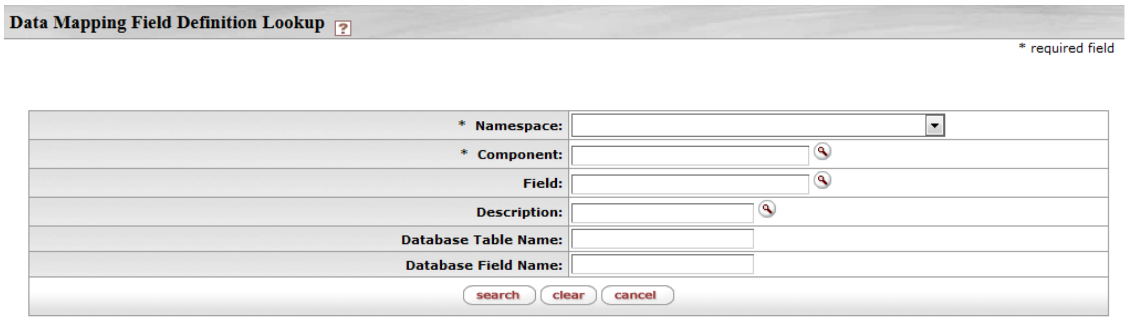


The Data Mapping Field Definition lookup displays definitions related to a given field in OLE. This information includes definitions such as the functional field description, the length of the field, whether or not it is encrypted, and the name of the field at the database level

Note

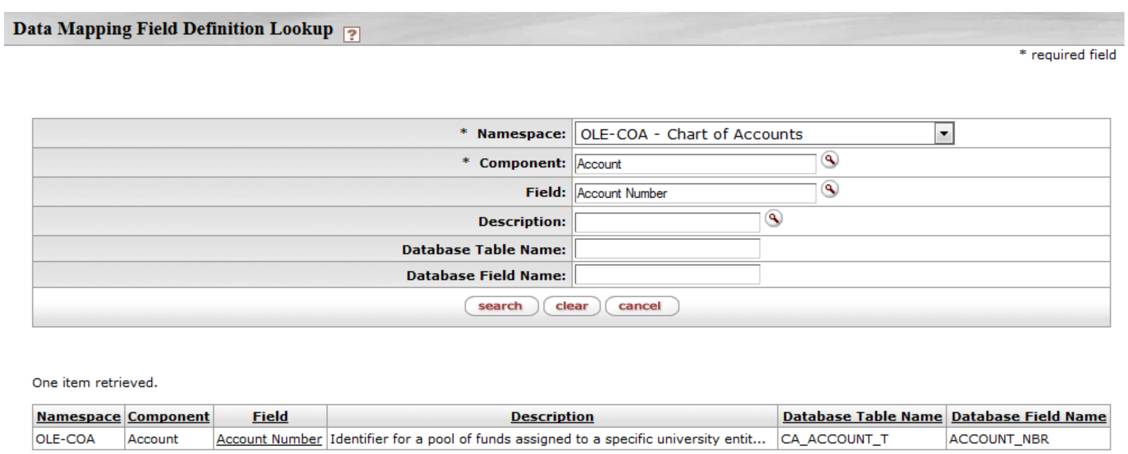
This data can only be updated by a technical resource and many of the values here are only meaningful to a technical user.

Document Layout

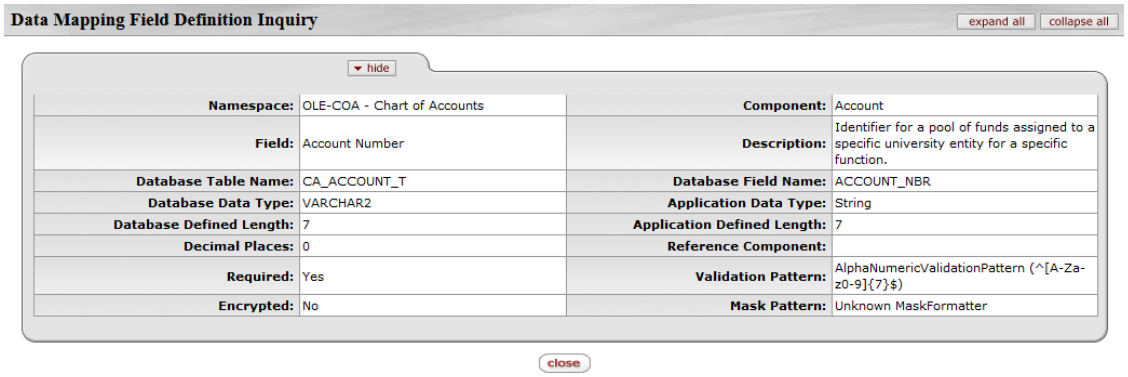


Data Mapping Field Definition Lookup definition

Title	Description
Namespace	Required. Select the namespace (large functional category) associated with the field you wish to search for.
Component	Required. Enter or search for and return the component (more specific functional category, such as a given screen or document section) associated with the field you wish to search for.
Field	Optional. Enter the field name of the field you wish to search for or use the lookup to search for it.
Description	Optional. Search for a field by its description. Remember that wildcards can be used, such as *account* to return all fields with the word 'account' in their description.
Database Table Name	Optional. Enter the name of the table in which the field you're searching for resides.
Database Field Name	Optional. Enter the name that identifies the field in the database.



The results display the namespace, component, field name, description and database field name and table name. Click on the linked field name to view the inquiry which contains additional data fields.



Data Mapping Field Definition Inquiry

expand all | collapse all

hide

Namespace:	OLE-COA - Chart of Accounts	Component:	Account
Field:	Account Number	Description:	Identifier for a pool of funds assigned to a specific university entity for a specific function.
Database Table Name:	CA_ACCOUNT_T	Database Field Name:	ACCOUNT_NBR
Database Data Type:	VARCHAR2	Application Data Type:	String
Database Defined Length:	7	Application Defined Length:	7
Decimal Places:	0	Reference Component:	
Required:	Yes	Validation Pattern:	AlphaNumericValidationPattern (^[A-Za-z0-9]{7}$)
Encrypted:	No	Mask Pattern:	Unknown MaskFormatter

close

Data Mapping Field Definition Inquiry

Fields appearing on the inquiry and not previously described above are detailed here.

Data Mapping Field Definition Inquiry definition

Title	Description
Database Data Type	The type of data expected for this field by the database.
Application Data Type	The type of data the application expects in this field.
Database Defined Length	The maximum character length of the field in the database.
Application Defined Length	The maximum character length of the field in the application.
Decimal Places	The number of decimal places supported by this field.
Reference Component	OLE component where this field originates. For example, an account number field has a reference component of 'account' indicating it is defined on the Account document.
Required	Indicates if the field must be completed for this particular component.
Validation Pattern	The technical pattern used to determine if the data in the field is valid.
Encrypted	Indicates if the field is encrypted at the database level.
Mask Pattern	If a field is masked (its content partially or fully obscured to unauthorized users) this field defines the type of masking used.

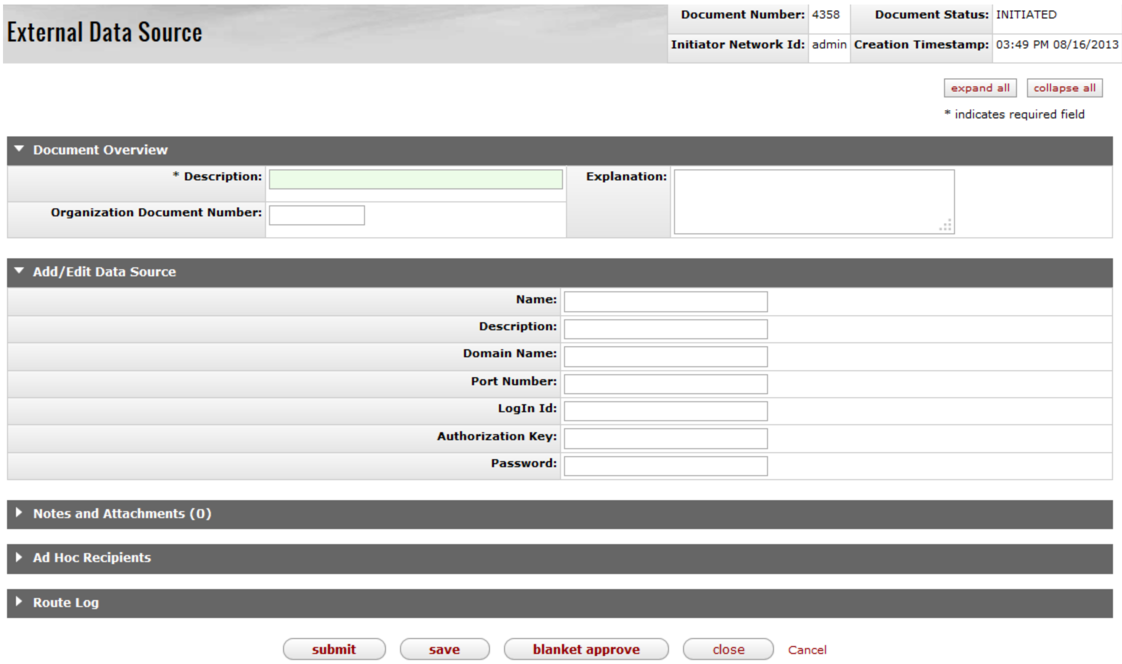
External Data Sources (z39.50 connection)

As the **Import Bib from External Data Source** option is available to show the possibility for institutions to import bibliographic records through a Z39.50 protocol, this interface exists to support the functionality. This e-doc can be used to create and maintain the sources for the import.

Note

Users will need to implement the Z39.50 protocol before using this e-doc.

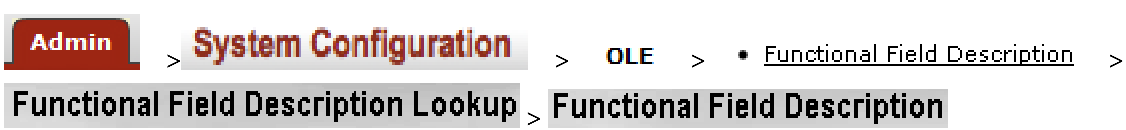
Document Layout



Add/Edit Data Source tab definition

Title	Description
Name	The familiar title of the data source.
Description	The description of the data source.
Domain Name	Enter the web address of the data source.
Port Number	Enter the port number required for accessing the data source.
Login ID	Enter the login ID of the data source.
Authorization Key	Enter the authorization key of the data source.
Password	Enter the password for the data source.

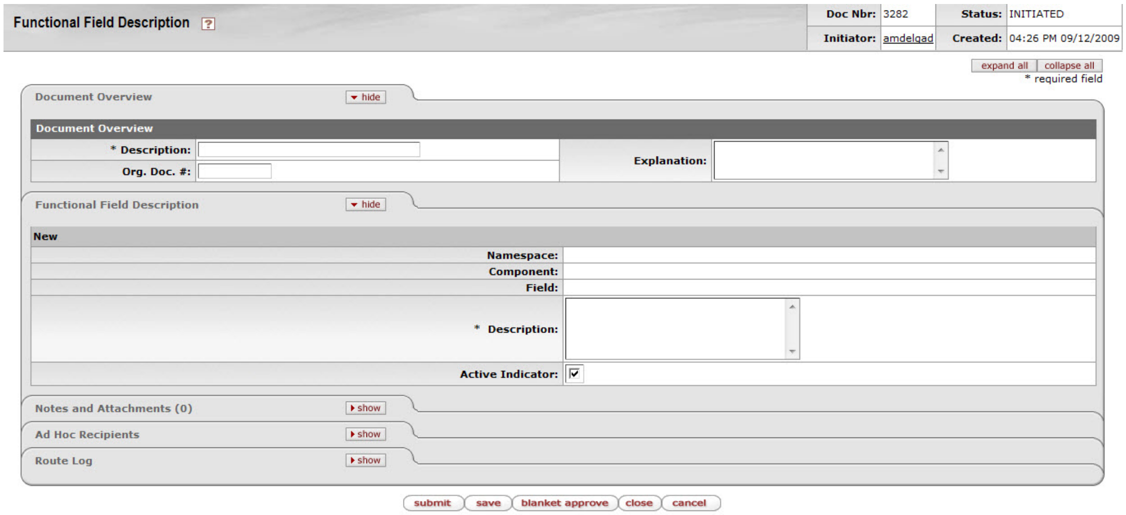
Functional Field Description



The Functional Field Description document is used to maintain descriptions for various fields throughout the application. Note that these values are for data mapping purposes only and cannot actually be viewed elsewhere in the application.

This document can only be initiated by members of OLE-SYS Manager role and does not route for approval. You can only edit existing field descriptions (by choosing 'edit' from the lookup). Creating new values requires technical assistance.

Document Layout



The Functional Field Description document contains the **Functional Field Description** tab.

Functional Field Description tab definition

Title	Description
Namespace	Display only. The namespace (large functional category) associated with the field you wish to edit the description for.
Component	Display only. The component (more specific functional category, such as a given screen or document section) associated with the field you wish to edit the description for.
Field	Display only. The field name of the field you wish to edit the description for.
Description	Required. Enter the description you wish to associate with this field.
Active Indicator	Required. Leave checked if you wish this functional description to be active. Uncheck the box if you wish to inactivate the description. Since these are not viewable elsewhere in the application inactivation will have no apparent effect.

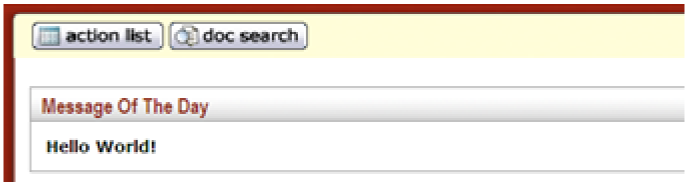
Message Of The Day

Admin > System Configuration > OLE > • Message Of The Day > Message Of The Day Lookup > Message Of The Day

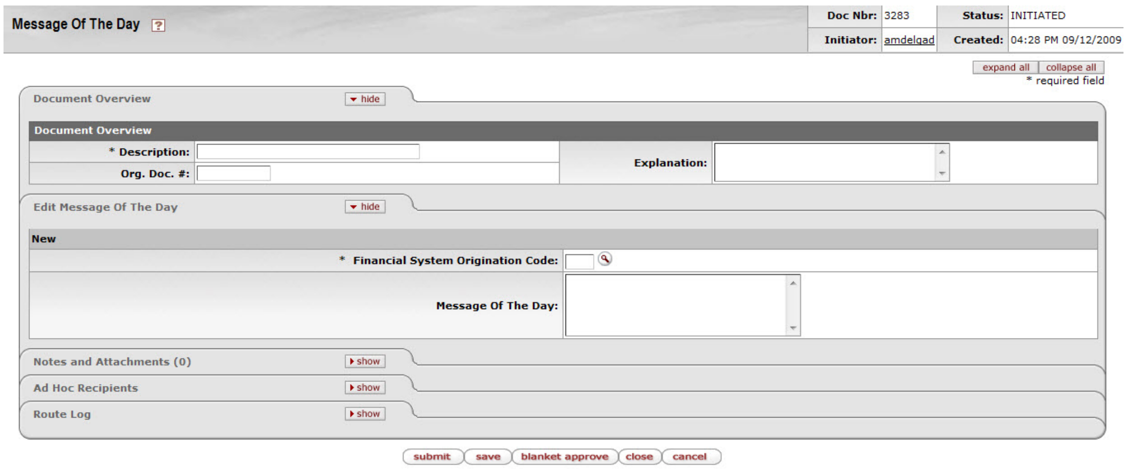
The Message of the Day document updates a message that appears OLE portal. It is an easy way to share information with OLE users and can be updated at any time.

Note

Only members of OLE-SYS Manager role can create or edit Message of the Day documents.



Document Layout



Edit Message Of The Day Tab

The Message of the Day document contains the **Edit Message of the Day** tab.

Edit Message of the Day tab definition

Title	Description
Financial System Origination Code	Required. Enter the code that identifies the instance of OLE in which you want the message to appear.
Message of the Day	Optional. Enter the text you want OLE users to see as the message of the day.

System Options

The System Options document defines many high-level definitions of a fiscal year, including balance types, object types and the university chart level. It also contains values that have an impact on how sufficient funds checking works for a given fiscal year.

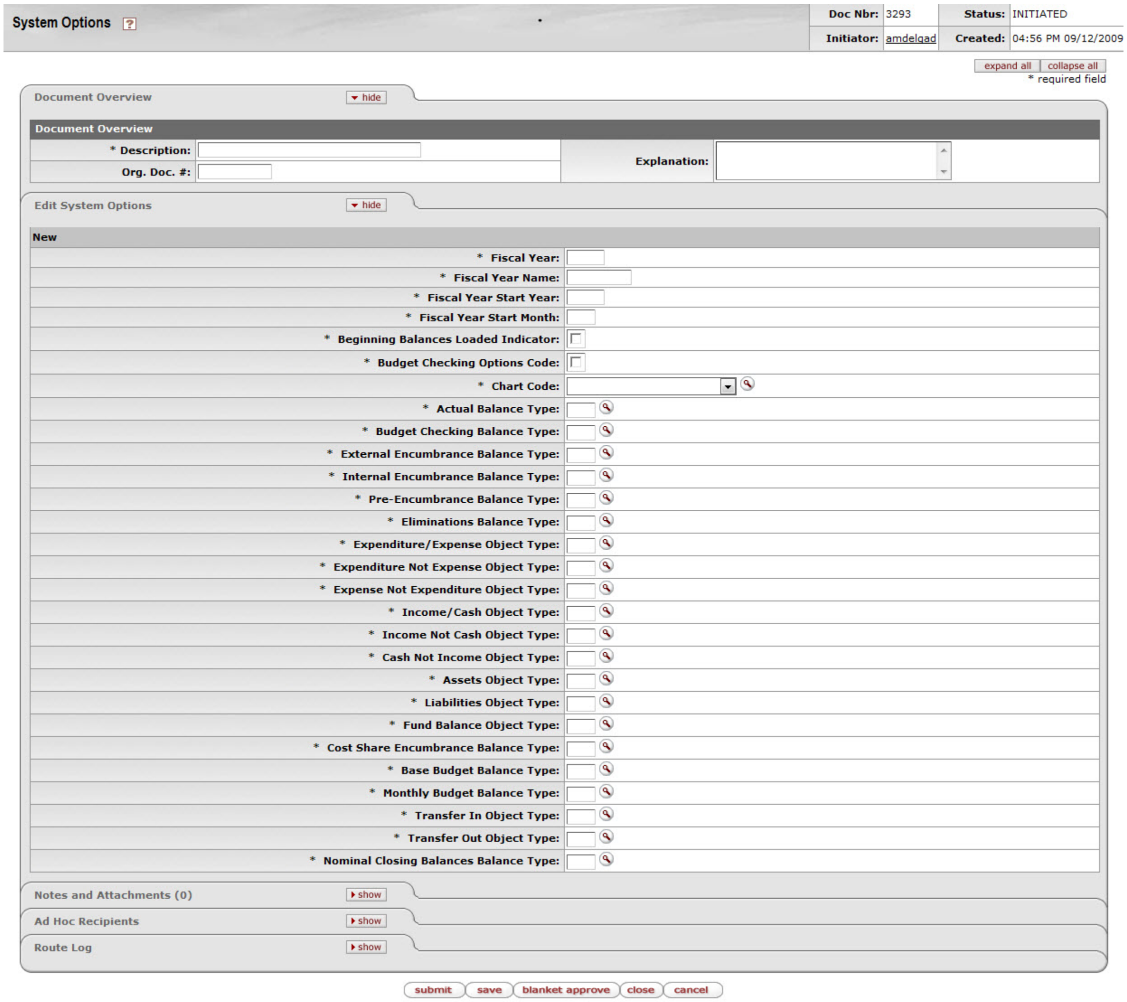
Note

Only members of OLE-SYS Manager role can create or edit System Options documents. These documents do not route for approval.

Tip

When you are configuring object types, it is important to cross reference the Object Type Table, System Options Table and the OBJECT_TYPES parameters in the Parameter Table.

Document Layout



Edit System Options Tab

The System Options document includes the **Edit System Options** tab.

Edit System Options tab definition

Title	Description
Fiscal Year	Required. Enter the fiscal year for which values are being defined.
Fiscal Year Name	Required. Enter the descriptive name of the fiscal year.
Fiscal Year Start Year	Required. Enter the calendar year when the fiscal year begins.
Fiscal Year Start Month	Required. Enter the calendar month when the fiscal year begins
Fiscal Year	Required. Enter the fiscal year for which values are being defined.
Beginning Balances Loaded Indicator	Optional. Select the check box if the beginning balances for the fiscal year have been loaded. If beginning balances have not been loaded then cash level sufficient funds checking must check both the previous and current

	fiscal years. Clear the check box if the beginning balances for the fiscal year have not been loaded.
Budget Checking Options Code	Required. Select the check box if sufficient funds checking is enabled for the fiscal year. Clear the check box if it is not.
Chart Code	Required. Enter the university level chart code defined for the fiscal year, or search for it from the **Chart** lookup .
Actual Balance Type	Required. Enter the balance type used to identify an Actual in the fiscal year, or search for it from the **Balance Type**lookup .
Budget Checking Balance Type	Required. Enter the balance type used to identify Budget Checking in the fiscal year, or search for it from the **Balance Type**lookup .
External Encumbrance Balance Type	Required. Enter the balance type used to identify External Encumbrances in the fiscal year, or search for it from the **Balance Type**lookup .
Internal Encumbrance Balance Type	Required. Enter the balance type used to identify Internal Encumbrances in the fiscal year, or search for it from the **Balance Type**lookup .
Pre-Encumbrance Balance Type	Required. Enter the balance type used to identify Pre-Encumbrances in the fiscal year, or search for it from the **Balance Type**lookup .
Eliminations Balance Type	Required. Enter the balance type used to identify Eliminations in the fiscal year, or search for it from the **Balance Type**lookup .
Expenditure/Expense Object Type	Required. Enter the object type used to identify the Expenditure/Expense category in the fiscal year, or search for it from the **Object Type**lookup
Expenditure Not Expense Object Type	Required. Enter the object Type used to identify the Expenditure Not Expense category in this fiscal year, or search for it from the **Object Type** lookup .
Expense Not Expenditure Object Type	Required. Enter the object Type used to identify the Expense Not Expenditure category in the fiscal year, or search for it from the **Object Type** lookup
Income/Cash Object Type	Required. Enter the object Type used to identify the Income/Cash category in the fiscal year, or search for it from the **Object Type** lookup .
Income Not Cash Object Type	Required. Enter the object type used to identify the Income Not Cash category in the fiscal year, or search for it from the **Object Type** lookup
Cash Not Income Object Type	Required. Enter the object type used to identify the Cash Not Income category in the fiscal year or search for it from the **Object Type** lookup .
Assets Object Type	Required. Enter the object type used to identify the Asset category in the fiscal year, or search for it from the **Object Type** lookup .
Liabilities Object Type	Required. Enter the object type used to identify the Liabilities category in the fiscal year, or search for it from the **Object Type** lookup .
Fund Balance Object Type	Required. Enter the object type used to identify the Fund Balance category in the fiscal year, or search for it from the **Object Type** lookup .
Cost Share Encumbrance Balance Object Type	Required. Enter the object type used to identify cost share encumbrances in the fiscal year, or search for it from the **Object Type** lookup .
Base Budget Balance Type	Required. Enter the object type used to identify Base Budget in the fiscal year, or search for it from the **Object Type** lookup .
Monthly Budget Balance Type	Required. Enter the object type used to Monthly Budget in the fiscal year, or search for it from the **Object Type** lookup .

Transfer In Object Type	Required. Enter the object type used to identify Transfer In transactions in the fiscal year, or search for it from the **Object Type** lookup .
Transfer Out Object Type	Required. Enter the object type used to identify Transfer Out transactions in the fiscal year, or search for it from the **Object Type** lookup .
Nominal Closing Balances Balance Type	Required. Enter the object type used to identify Nominal Balance closing entries in the fiscal year, or search for it from the **Object Type** lookup .

Search Framework Configuration

Admin > System Configuration > OLE > Search Framework Configuration >

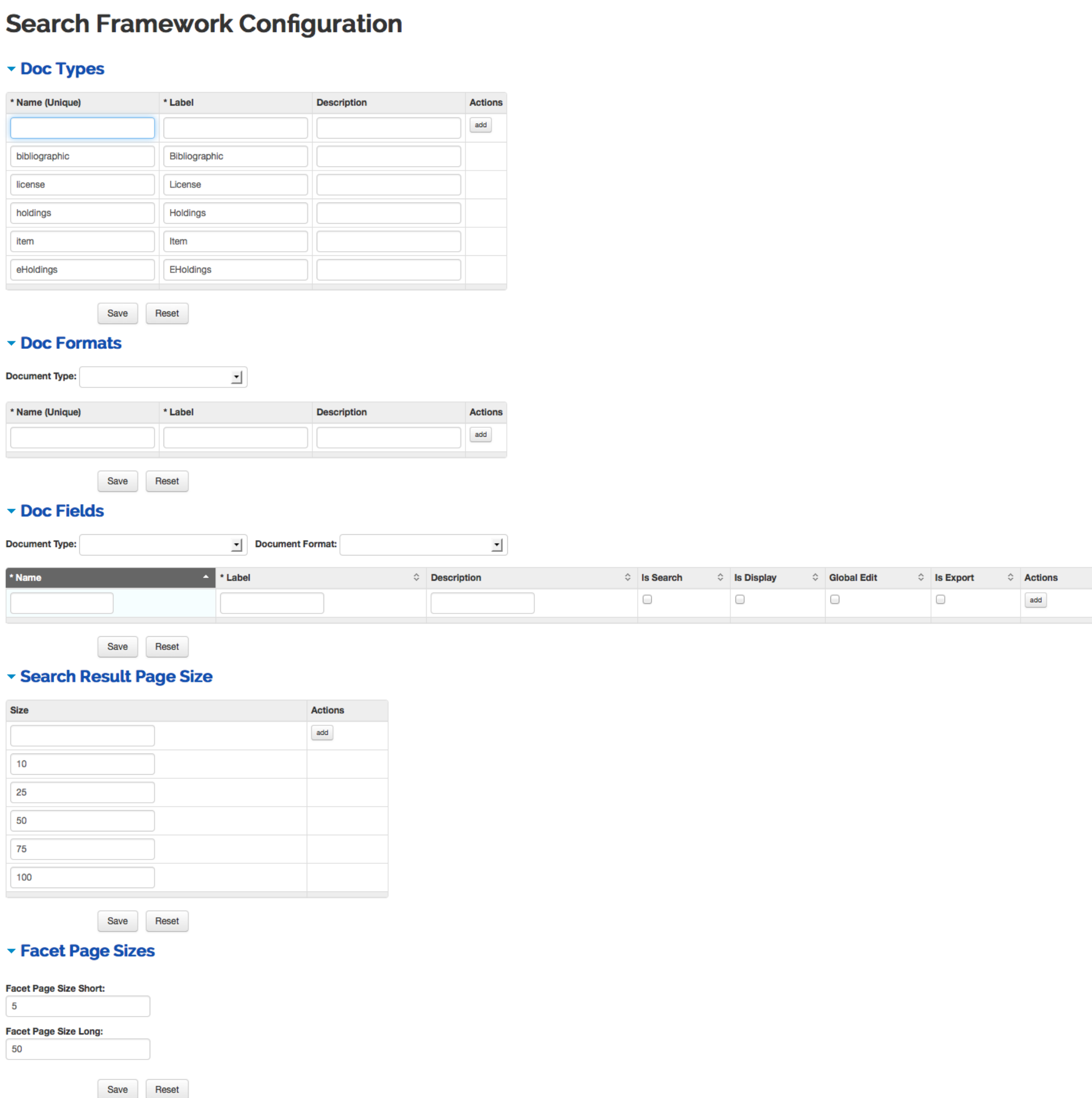
Search Framework Configuratio

The **Search Framwork Configuration** controls what is displayed on the Search Workbench and to a large degree how the Search Workbench operates.

Note

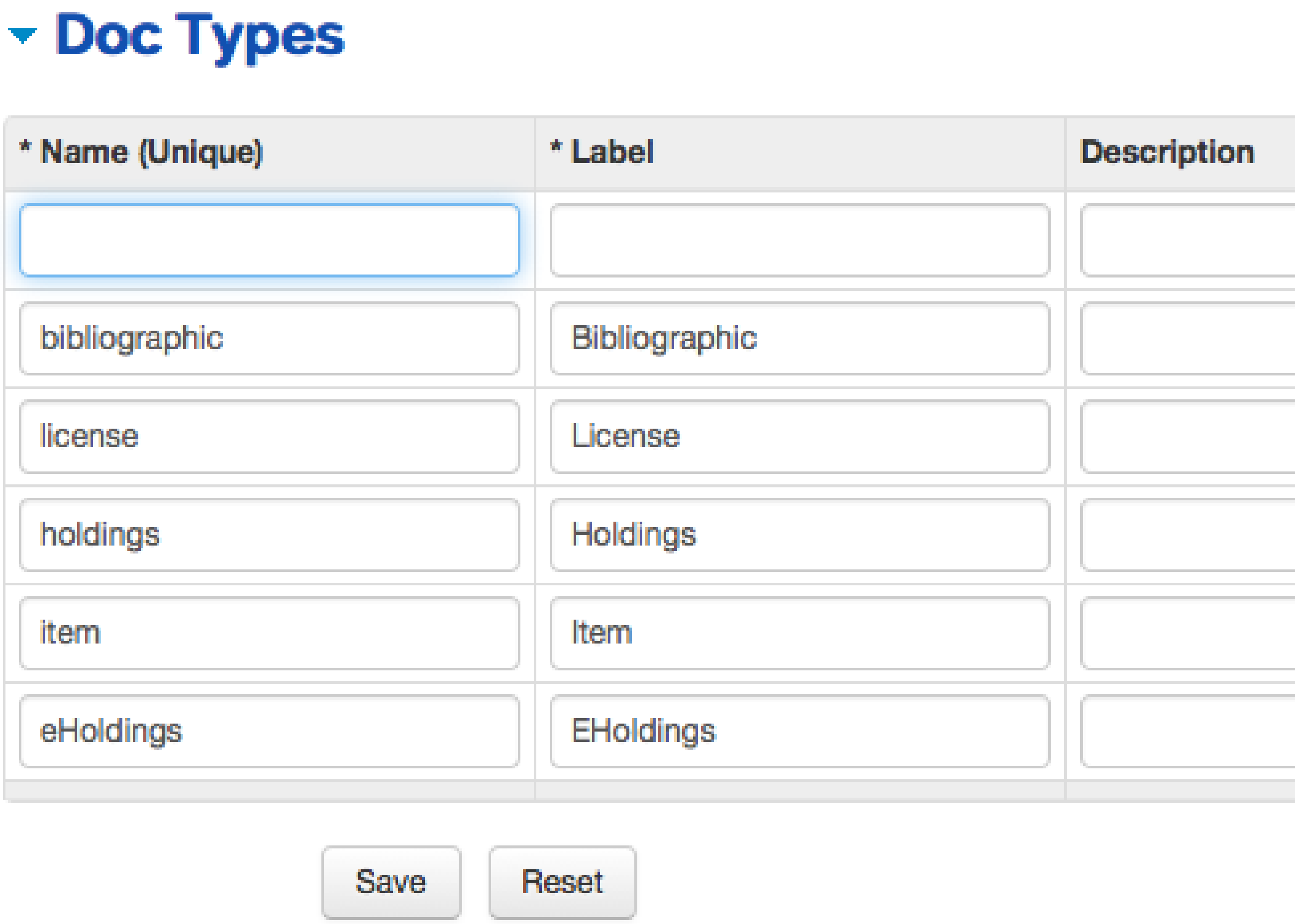
To see the system defaults for 1.5, see the Jira OLE-6360.

Document Layout

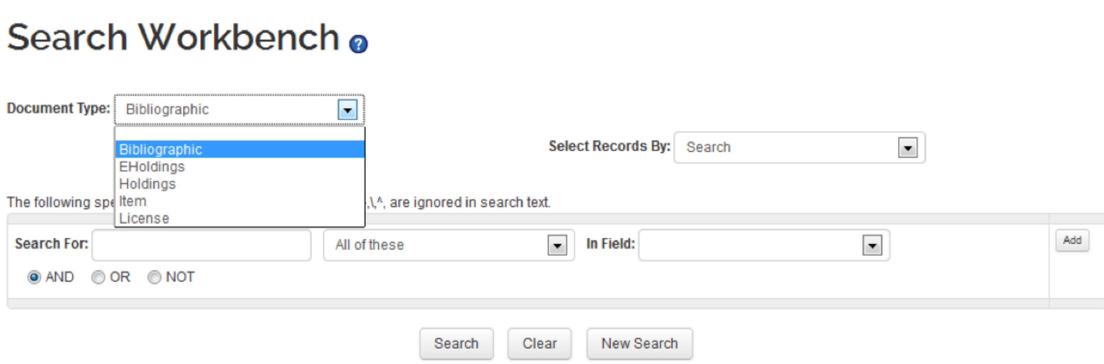


The Search Framework Configuration screen is divided into 5 parts with each part controlling a different aspect of the Search Workbench: **Doc Types**, **Doc Formats**, **Doc Fields**, **Search Result Page Size**, and **Facet Page Size**.

Doc Types Tab



The Doc Types tab has 3 columns and as many rows as are needed to define the various doc types of records stored in DocStore. These Doc Types are what are displayed on the Search Workbench in the Document Type drop down:



They are also used in the other sections of the Search Framework Configuration as described below.

Multiple doc types can be added to the search framework configuration by filling in all of the required fields and clicking the **add** button.

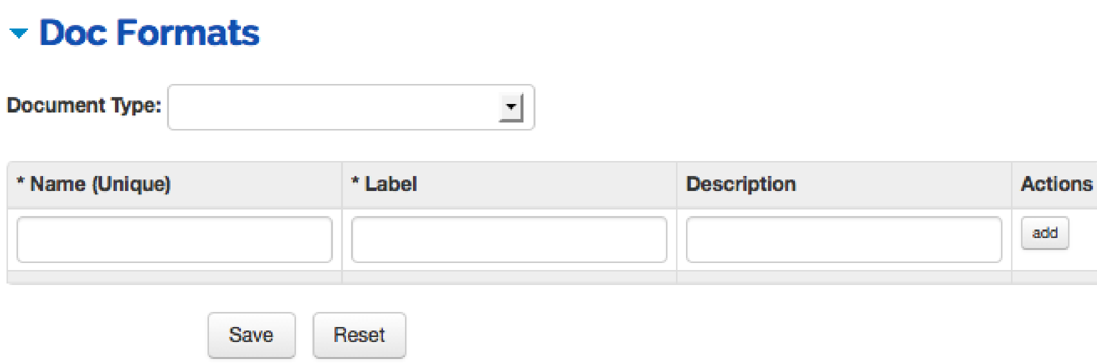
Warning

DO NOT ADD OR CHANGE ANY VALUES IN THIS SECTION WITHOUT FIRST CONSULTING WITH A PROGRAMMER. Code changes are needed to support a new document type.

Doc Types Column definitions

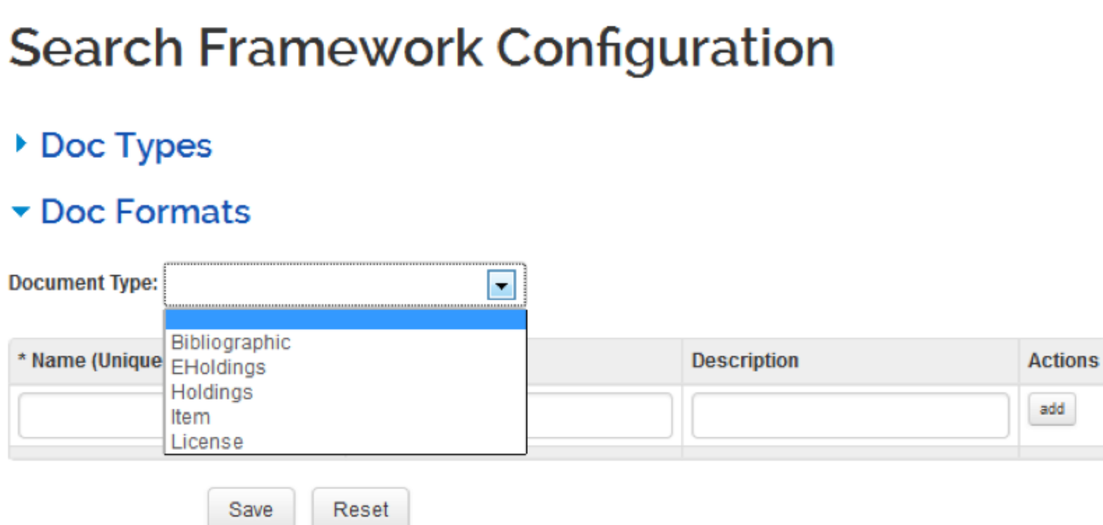
Title	Description
Name	Required. A unique name of the Doc Type. This will appear within the code.
Label	Required. A label for the Doc Type. This will appear in the Doc Type lookup on the Search Workbench.
Description	Optional. A description for the Doc Type.

Doc Formats Tab



The Doc Formats tab allows you to define multiple formats for document types and to provide each with a distinct label. The values in the drop down “Document Type” are from the Doc Types definitions described above.

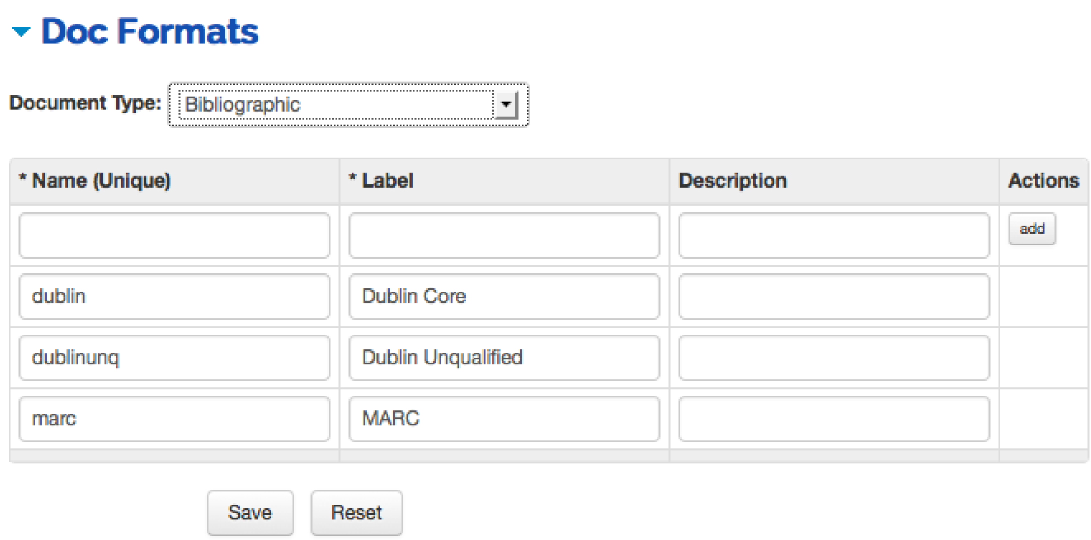
To work with the Doc Formats section, first select a **Document Type** in that drop down.



Selecting **Document Type** Bibliographic will display the 3 formats defined for 3 different Bibliographic formats: Dublin Core, Dublin Unqualified, and MARC.

Selecting **Document Types** EHolding, Holding and Item will display a single document format definition for each. For all of these document types, the format is oleml (OLE Markup Language – an xml format).

Selecting **Document Type** License displays 4 different formats for License. The definitions are DOC (Word Doc), ONIXPL (ONIX for Publications Licenses), PDF (Adobe), and XSLT (Extensible Stylesheet Language Transformations).



The format definitions along with the Doc Types are used in the Doc Fields section described below.

Multiple doc formats can be added to the search framework configuration by filling in all of the required fields and clicking the **add** button.

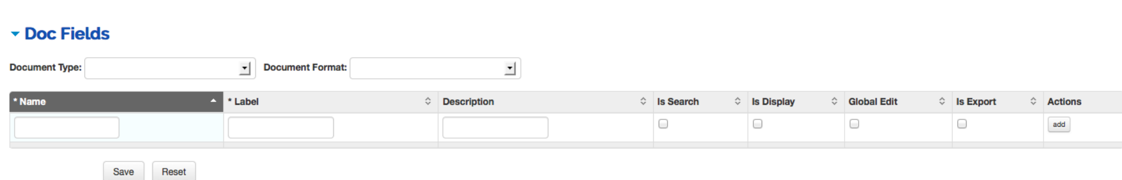
Warning

DO NOT ADD OR CHANGE ANY VALUES IN THIS SECTION WITHOUT FIRST CONSULTING WITH A PROGRAMMER. Code changes are needed to support a new document type.

Doc Format Column definitions

Title	Description
Name	Required. A unique name of the Doc Format. This will appear within the code.
Label	Required. A label for the Doc Format.
Description	Optional. A description for the Doc Format.

Doc Fields Tab



The Doc Fields tab controls the fields that are available for searching, the fields that are displayed in the results, the fields that can be globally edited in the Global Edit screen, and the fields that will be exported in an XML format from the search results. It also controls the definitions of those fields in terms of the values recorded in the bibliographic records. For example a field called Title can be defined in terms of MARC fields.

Note

Changes to some Doc Fields values will only affect records added or edited after the change is made because an indexing update is necessary to alter the display.

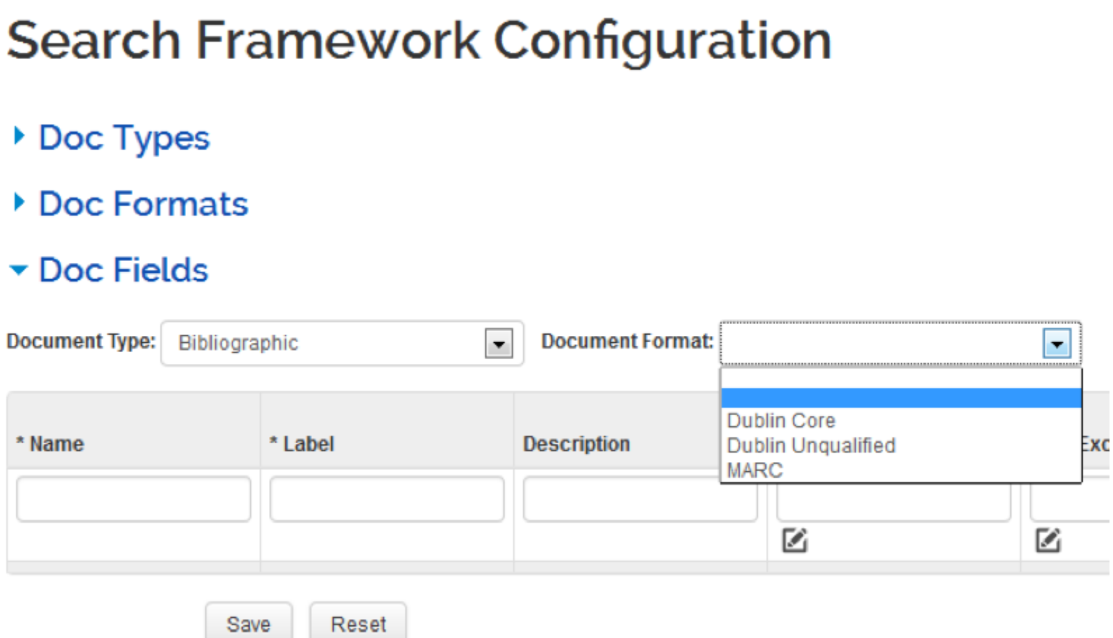
In order to index and reindex bibliographic, holdings, e-holdings, and item records in Solr, go to http://demo.docstore.ole.kuali.org/admin.jsp (or http://tst.docstore.ole.kuali.org/admin.jsp if you are in the tst environment).

Click the **Start** button.

Click **Show Status** button to see the status.

Indexing is complete when you see the "Index End Time"

To use this section, you need to select values from both the drop downs: Document Type and Document Format. The values for these lists are from the previous sections Doc Types and Doc Formats. Selecting a Doc Type will change the values in the Document Format section.



Depending on the Document Type selected from the drop down, different columns will be displayed.

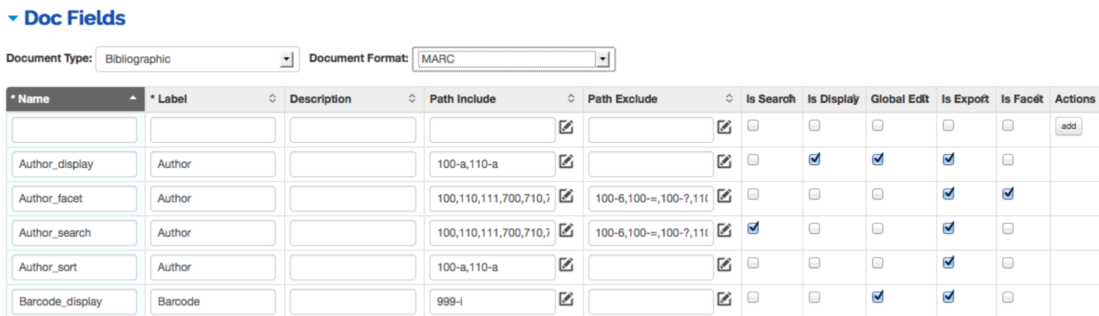
Doc Fields for Document Type – Bibliographic and Document Format – MARC

Selecting **Document Type** Bibliographic and **Document Format** MARC displays columns:

Name, Label, Description, Path Include, Path Exclude, Is Search, Is Display, Global Edit, Is Export, and Is Facet.

A Note on Titles: What OLE displays as Title in the search results is Title_sort. If you modify Title_display you will not see the results. However if you mouse-hover over a Title_sort value in the Search Workbench, you will see the Title_display value.

Multiple doc fields can be added to the search framework configuration by filling in all of the required fields and clicking the **add** button.



Doc Fields definitions

Title	Description
Name	Required. This is the name of the field used in Solr configuration. Please note that each Name value here must have the same name in the Solr configuration. **Warning** Adding a name here must be accompanied by a reconfiguration of Solr to be effective. Changing an existing Name value here without a corresponding name change in Solr will have unforeseen consequences .
Label	Required. This is what the users will see displayed as search values in the ‘In Field’ drop down on the Search Workbench for selecting the search criteria for Names ending in “_search” and the column names for search results for Names ending in “_display”. This can be changed without any corresponding change in Solr Configuration. **Note** As of this writing, changing the value for an existing Label does not affect what the users see.
Description	Optional. This is just for documentation. It does not have any impact on what the user sees on the Search Workbench.
Path Include	Optional. For Bibliographic Marc format fields, this is a reference to the underlying MARC fields and subfield codes. Entering a MARC field and subfield here defines what fields are displayed or searched on when this field is displayed in the search results or searched if selected in the search criteria. The default values displayed were derived from the OLE Search Technical Documentation page (section 1.3) on OLE’s Wiki page. There is a specific syntax to be used for both Path Include and Path Exclude. See Path Syntax below.
Path Exclude	Optional. For Bibliographic MARC format fields, this is a limitation on the Path Include values. If the path include for Title_display field for example was “245”, a value of “245-c” in this column would cause all values in 245 subfields to display except for the value in subfield 245 c. See Path Syntax below for a definition of the syntax to be used.

Is Search	Optional. Checking this box for a field will cause the field label to appear as a value in the "In Field" drop down on the Search Workbench. Removing the check will cause that field to disappear from those drop down values. Only check fields in this column which have "_search" as the last part of their names. See Cautionary Notes below.
Is Display	Optional. Checking this box for a field will cause the field label to appear as a column in the search results on the Search Workbench. Removing the check will cause that field column to disappear from the search results display on the Search Workbench. Only check fields in this column which have "_display" as the last part of their names. See Cautionary Notes below.
Global Edit	Optional. Checking this box for a field will allow the field to be edited in the Global Edit screens. A Global Edit screen for Bibliographic records is a future enhancement. This column will likely be hidden until that enhancement is ready.
Is Export	Optional. This is for a future feature that will allow export of fields in csv format. It has no impact on the "Export to Doc XML" function displayed under the search results on the Search WorkBench screen.
Is Facet	Optional. Checking this box will cause the Label for this field to appear in the "Narrow Search" section of the Search Workbench screen when searching for Bibliographic records. Only check fields in this column that have "_facet" as part of their names. See Cautionary Notes below.
Actions	Click **add** before clicking **save**to add extra rows to the **Doc Fields** tab.

Path Syntax

There is a specific Path syntax to be used in the Path Include and Path Exclude column values for a field. Here are examples of the syntax.

245-a means MARC field 245, subfield a. This is the value that will be searched or displayed for that field name.

245-a;b means MARC field 245 subfield a and subfield b. The semi colon means that for display fields, the value displayed will be the concatenated values of those subfields.

234-c, 245-6 means MARC field 245 subfield c and field 245 subfield 6 will be displayed, the comma will cause those two values to display on two lines in the search results.

600,610,69* means all the subfields of 600 will be concatenated and displayed on the first line, all the subfields of 610 will be concatenated and displayed on the second line, all the values of all the subfields of all fields starting with 69 will be concatenated and displayed on a third line.

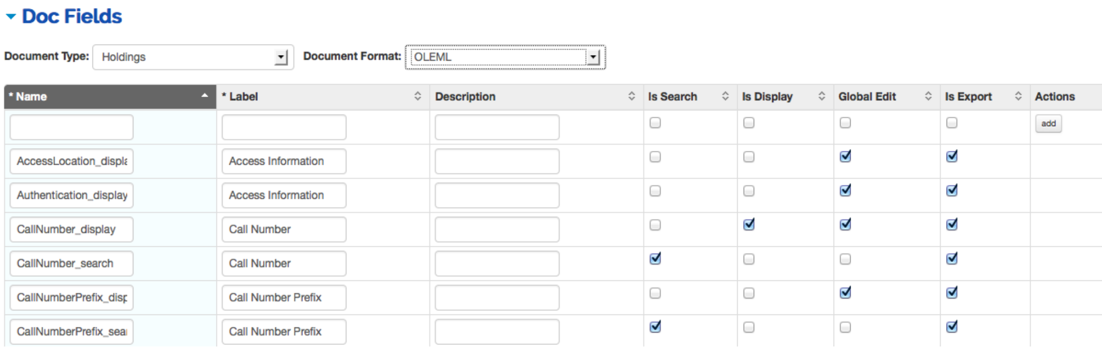
Note: There are some nonstandard subfields in a few of the default values that should not be confused as some kind of syntax. Examples include the Author_display Path Exclude field. The values "100-=" and "100-?" are actually subfields for the 100 field used by some of OLE's partner institutions' current systems – not syntax. It is likely that those subfields will not be used in OLE and will be removed from these default field definition values.

Doc Fields for Document Type Holdings, EHoldings, and Items; Document Format OLEML

Selecting **Document Type** Holding, EHoldings, or Items and **Document Format** OLEML displays columns:

Name, Label, Description, Is Search, Is Display, Global Edit, Is Export, and Is Facet.

Multiple doc fields can be added to the search framework configuration by filling in all of the required fields and clicking the **add** button.



Doc Fields definitions

Title	Description
Name	Required. This is the name of the field used in Solr configuration. Please note that each Name value here must have the same name in the Solr configuration. **Warning** Adding a name here must be accompanied by a reconfiguration of Solr to be effective. Changing an existing Name value here without a corresponding name change in Solr will have unforeseen consequences .
Label	Required. This is what the users will see displayed as search values in the 'In Field' drop down on the Search Workbench for selecting the search criteria for Names ending in "_search" and the column names for search results for Names ending in "_display". This can be changed without any corresponding change in Solr Configuration. **Note** As of this writing, changing the value for an existing Label does not affect what the users see.
Description	Optional. This is just for documentation. It does not have any impact on what the user sees on the Search Workbench.
Is Search	Optional. Checking this box for a field will cause the field label to appear as a value in the "In Field" drop down on the Search Workbench. Removing the check will cause that field to disappear from those drop down values. Only check fields in this column which have "_search" as the last part of their names. See Cautionary Notes below.
Is Display	Optional. Checking this box for a field will cause the field label to appear as a column in the search results on the Search Workbench. Removing the check will cause that field column to disappear from the search results display on the Search Workbench. Only check fields in this column which have "_display" as the last part of their names. See Cautionary Notes below.
Global Edit	Optional. Checking this box for a field will allow the field to be edited in the Global Edit screens. A Global Edit screen for Bibliographic records is a future enhancement. This column will likely be hidden until that enhancement is ready.
Is Export	Optional. This is for a future feature that will allow export of fields in csv format. It has no impact on the "Export to Doc XML" function displayed under the search results on the Search WorkBench screen.
Is Facet	Optional. Checking this box will cause the Label for this field to appear in the "Narrow Search" section of the Search Workbench screen when searching for Bibliographic records. Only check fields in this column that have "_facet" as part of their names. See Cautionary Notes below.
Actions	Click **add** before clicking **save**to add extra rows to the **Doc Fields** tab.

Notes about some of the Field Name rows defined for Holdings, Items and Eholdings:

- Title_display is needed.
- Some current fields like Title_Facet, Title_search, Title_sort are not meaningful here and will be removed.
- Fields like “CallNumber_display” and “CallNumber_search” can be merged into a single field. We anticipate that this will be done soon.

Cautionary Notes

- The question has come up about the significance of the “_display”, “_search”, “_facet”, “_sort” that are included in the Name column. If all of those different names for the same type of field are defined exactly the same in the Path Include and Path Exclude fields, can one of those fields have the Is Search, Is Display, Global Edit, and Is Facet boxes checked and the other fields ignored. This is something that still needs to be tested. Until then, only check the boxes as described above.
- The field Names ending in “_sort” are for internal use and exist primarily for the possible suppression of initial characters in the subfield value. We are not yet sure if there is a use case for having different values in the Path Include and Path Exclude fields for this Name than are present for the same field with “_display” at the end. At present the Path Include and Exclude values for Names ending with “_sort” are the same as those ending with “_display”.
- If a change is made in the Path Include or Path Exclude for any of the existing Names, the change will only be effective for bibliographic records created after the change. A re-index of the bibliographic records will be required to make that change effective for records that existed before the change. Even if the Name is a “_display” field, it will require a re-index to be effective for existing documents.

Note

In order to index and reindex bibliographic, holdings, e-holdings, and item records in Solr, go to http://demo.docstore.ole.kuali.org/admin.jsp (or http://tst.docstore.ole.kuali.org/admin.jsp if you are in the tst environment).

Click the **Start** button.

Click **Show Status** button to see the status.

Indexing is complete when you see the "Index End Time"

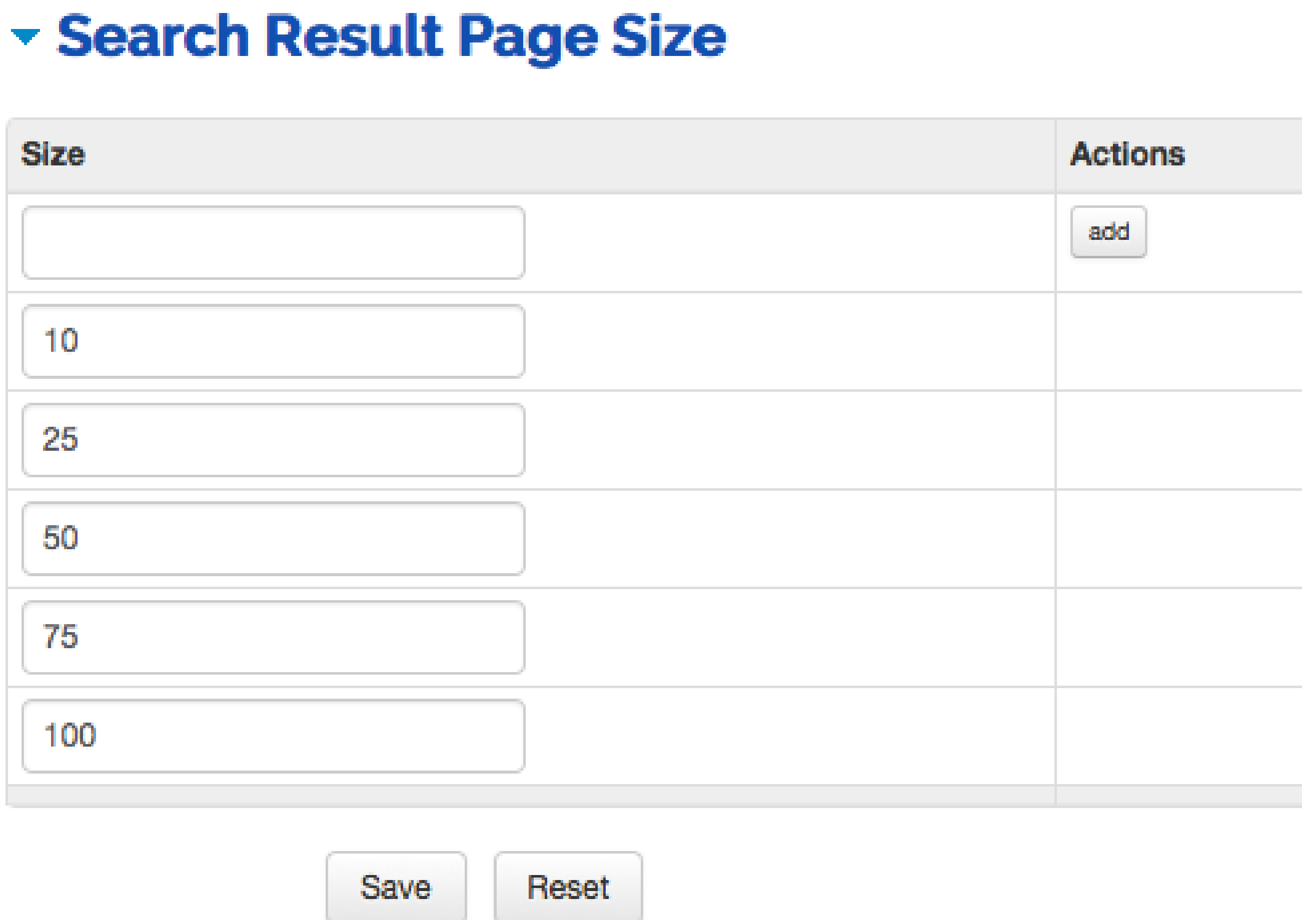
Note: There are some nonstandard subfields in a few of the default values that should not be confused as some kind of syntax. Examples include the Author_display Path Exclude field. The values “100-=” and “100-?” are actually subfields for the 100 field used by some of OLE’s partner institutions’ current systems – not syntax. It is likely that those subfields will not be used in OLE and will be removed from these default field definition values.

Doc Fields for Document Type Licenses

The doc field definitions for Document Type License has not been verified as yet.

Search Results Page Size Tab

Multiple Search Result Page Sizes can be added to the search framework configuration by filling in all of the required fields and clicking the **add** button.



Search Result Page Size Column definitions

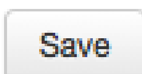
Title	Description
Size	Required. The number of search results displayed options available with each search's Result's **Show __ Entries** .

Facet Page Size Tab

Multiple Facet Page Sizes can be added to the search framework configuration by filling in all of the required fields and clicking the **add** button.

Process Overview

Modify tabs within the Search Framework Configuration page. Consult a programmer before adding or modifying some of the sections, these are noted above.

Click 

to save any changes or additions you have made. You must save each section that you modify.

Click to discard any changes you have made since the section was last saved. The reset function only restores everything from the database, by clicking the button any changes made in the session without clicking save will be reverted.

Example

An example of how indexing and searching is done:

When a Bib MARC record is added or updated, the following fields are generated for this record and indexed in Solr:

Title_search - This is a multi-valued field and the values are generated by taking all the subfields of the datafields 245,130,240,246,247,440,490,730,740,773,774,780,785,830,840 (Path Include values) and excluding the subfields

245-c,245-6,245-c,245-6,130-c,130-6,240-c,240-6,246-c,246-6,247-c,247-6,440-c,440-6,490-c,490-6,730-c,730-6,740-c,740-6,773-c,773-6,774-c,774-6,780-c,780-6,785-c,785-6,830-c,830-6,840-c,840-6 (Path Exclude values)

So there can be 15 values of Title_search generated, assuming all of the above data fields have values.

Title_display - 245-a;b - This is a single-valued field and its value is generated by concatenating subfields a and b of datafield 245

When a search request (**Title** = 'ole') is submitted, the query is built and sent to solr. The value 'ole' is looked for in the 15 or so values of **Title_search** field of every bib record **in Solr**. If found, the single value of **Title_display** of the matched record is returned **from Solr** as a search result row.

(So, the value searched for may not appear in the displayed search result row.)

Both **_search** and **_display** fields are updated in Solr whenever a MARC record is added or updated in OLE. And the **Path Include** and **Path Exclude** definitions that are available at that time will be used for updating Solr.

So if the **Path Include** and **Path Exclude** are modified for either the **_search** or **_display** field, these modifications will not affect the records already indexed in Solr, until they are reindexed.

Is_search property of **Title_search** field tells whether the user can run a search against this field.

Is_display property of **Title_display** field tells whether the user can see this column in search result grid.

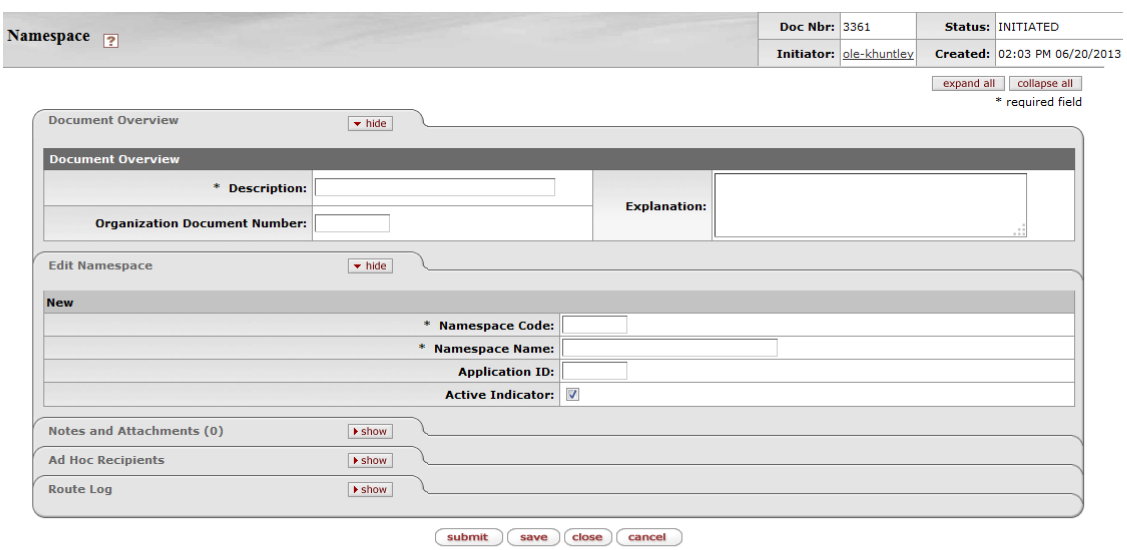
Namespace

Admin > System Configuration > Parameters > • Namespace > Namespace Lookup > Namespace

The Namespace document allows you to add new or maintain existing namespace codes. Namespace codes are used to identify various pieces of functionality and generally correspond to large functional areas. The namespaces in OLE base data normally take the form of a Kuali application followed by one of that application's modules. For example OLE Purchasing /Accounts Payable module would be associated with the namespace OLE-PURAP.

This document can only be initiated by members of OLE-SYS Manager or KR-SYS Technical Administrator role and does not route for approval.

Document Layout



Edit Namespace Tab

The Namespace document contains the **Edit Namespace** tab.

Edit Namespace tab definition

Title	Description
Namespace Code	Required. Enter the namespace code for this namespace. OLE convention for most namespaces is application abbreviation and module abbreviation separated by a dash (OLE-PURAP, KR-WKFLW, etc.)
Namespace Name	Required. A longer text description for this namespace code.
Application ID	Optional. An additional namespace identifier which identifies which application should recognize this namespace code. This is generally only used in instances where the regular namespace code is not enough to make a definition unique. This definition is normally used directly on the Parameter document and not assigned specifically to a namespace on this table.
Active Indicator	Required. Leave checked to indicate that this namespace is active and can be associated with permissions, responsibilities, roles and Kuali data elements organized by namespace. Uncheck the box to inactivate this namespace and make it an invalid choice.

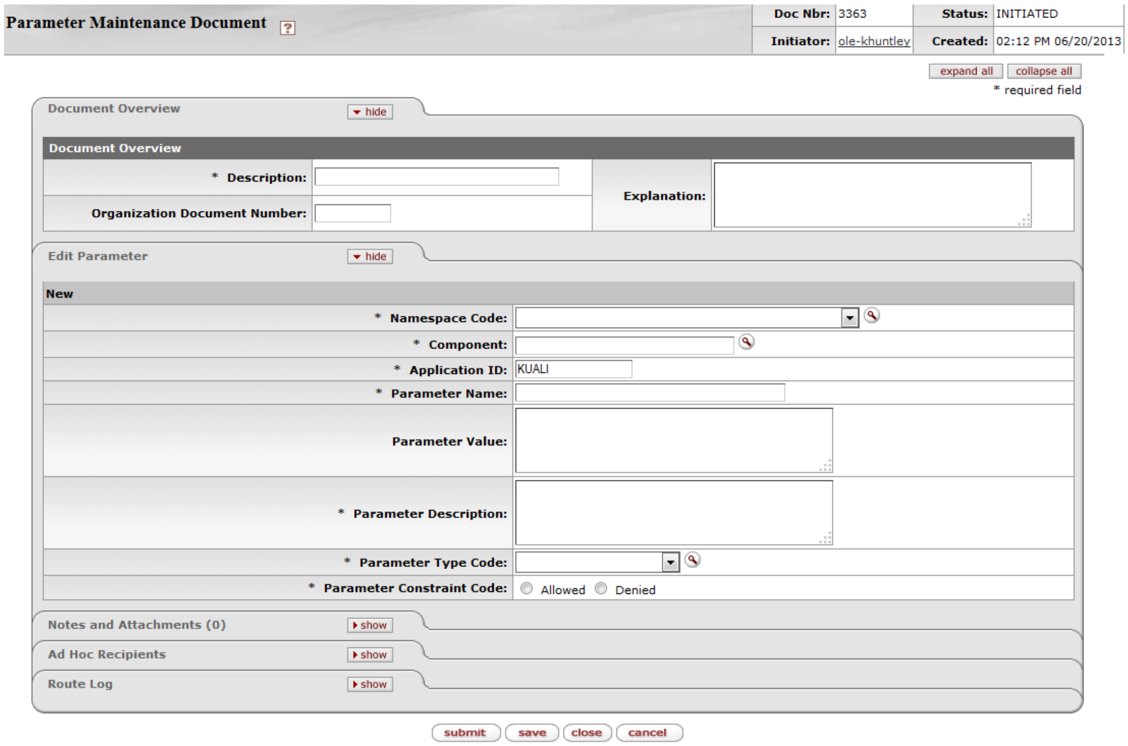
Parameter

Admin > System Configuration > Parameters > • Parameter > Parameter Lookup > Parameter

The Parameter document is used to define parameters and business rules in OLE. A specific value of a parameter can vary based on what the parameter is used to define. Some parameters create business rules. These rules create restrictions and enforce valid values and combinations on various document types or batch processes. Other parameters simply define institution-specific values not defined elsewhere in OLE. The value may, for example, be text that OLE is to display in a given location or it may be a simple yes or no value to turn an option on or off.

Only members of the KR-SYS Technical Administrator or OLE-SYS Manager role can create or edit Parameter documents.

Document Layout



Edit Parameter Tab

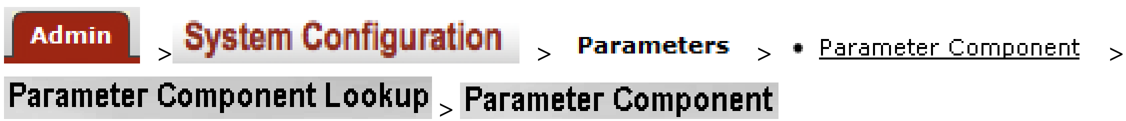
The Parameter document includes the **Edit Parameter** tab. This tab is where you define the modules, type, rules, and description of the parameters.

Edit Parameter tab definition

Title	Description
Namespace Code	Required. Select the appropriate Namespace code for the parameter from the **Namespace Code** list or search for it from the lookup.
Component	Required. Enter the parameter component code or search for it from the **Parameter Component** lookup .
Application ID	Required. Enter the application namespace to identify the application to which this parameter applies. Note that the same parameter can have different values for different applications.
Parameter Name	Required. Enter the name of the parameter being defined.
Parameter Value	Required. Enter the value for the parameter. The nature of a given parameter determines what form the parameter value should take. In some cases it is text for an OLE user to view or it could be a value such as an account number or an object code. In cases where multiple values are allowed they should be separated by a semi-colon. Consult with technical resources if you are unsure what format a specific parameter value should take.
Parameter Description	Required. Describe the purpose and usage of the parameter. The description is used for a documentation purpose.
Parameter Type Code	Required. Select the parameter type code from the **Parameter Type** list or search for it from the lookup . Default types include:

	System Configuration: Used to establish institution values not specific to validation. Document Validation: Used to establish business rules for documents.
Parameter Constraint Code	Required. Select Allowed if the parameter is to allow the defined parameter value within OLE application. Select **Denied** if the parameter is to deny the defined parameter value within OLE application. Consult with technical resources if you are unsure of the appropriate constraint code for a given parameter.

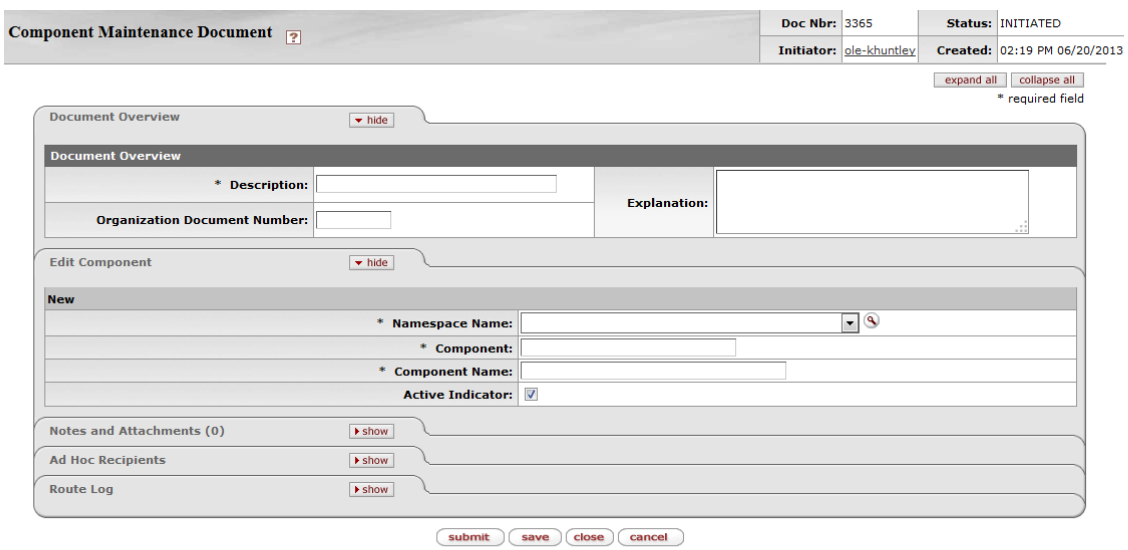
Parameter Component



The Parameter Component document defines valid components that can be associated with a parameter. Parameter components indicate a general or specific piece of OLE functionality to which a parameter applies. Some Parameter Components are generic (batch, lookup, all) while others are very specific and refer to particular documents or even specific tabs or fields on documents.

Only members of the KR-SYS Technical Administrator or OLE-SYS Manager role can create or edit Parameter Component documents.

Document Layout



Edit Component Tab

The Parameter Component document includes the **Edit Component Type** tab.

Edit Component tab definition

Title	Description
Namespace Name	Required. Select the appropriate Namespace code for the parameter from the Namespace Name list or search for it from the lookup.
Component	Required. Enter the parameter component code or search for it from the Parameter Component lookup .

Component Name	Required. Enter the descriptive name of the parameter component being defined.
Active Indicator	Required. Leave checked to indicate that this parameter component is active and can be associated with parameters. Uncheck the box to inactivate this component and make it an invalid choice.

Parameter Type

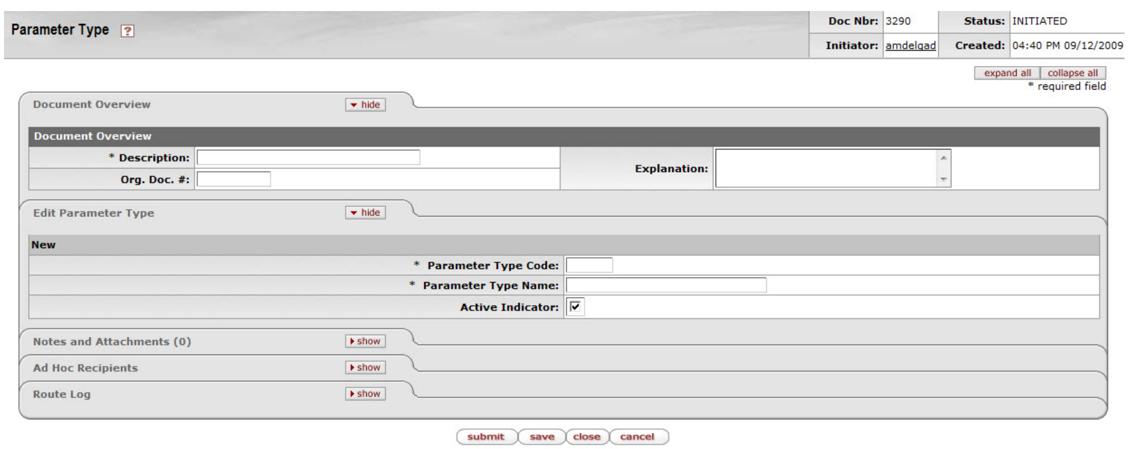
Admin > System Configuration > Parameters > • Parameter Type > Parameter Type Lookup > Parameter Type

The parameter type broadly defines what a parameter is used for. Parameters used for document validation (such as business rules) and parameters used for System Configuration (customizing OLE for your institution) are two types of parameters used in OLE.

The Parameter Type document allows you to create new or edit existing parameter types. Code must be developed to support any additional types or changes to existing types.

Only members of the KR-SYS Technical Administrator or OLE-SYS Manager role can create or edit Parameter Type documents and they do not route for approval.

Document Layout



Edit Parameter Type Tab

The Parameter Type document includes the **Edit Parameter Type** tab.

Edit Parameter Type tab definition

Title	Description
Parameter Type Code	Required. Enter the code by which this parameter type will be identified.
Parameter Type Name	Required. Enter the long descriptive name for this parameter type.
Active Indicator	Required. Check the box to make this parameter type active and available for selection when creating parameters. Uncheck the box if you wish to inactivate this type of parameter and prevent its selection when creating new parameters.

Chapter 5. Workflow Administrative Documents

Admin > Workflow Admin > Document Type
People Flow
Routing and IDM Doc Type
Rule Attribute
Statistics
Workflow Attribute
XML Import

The Kuali OLE Modules submenu allows you to perform a variety of functional and technical activities that affect the entire system. This includes uploading XML and People Flow rules to modify workflows. Users may also access the Staff Upload interface.

Note

For information on Statistics, see the section Statistics Report

Document Type

Admin > Workflow Admin > • Document Type > Document Type Lookup > Document Type

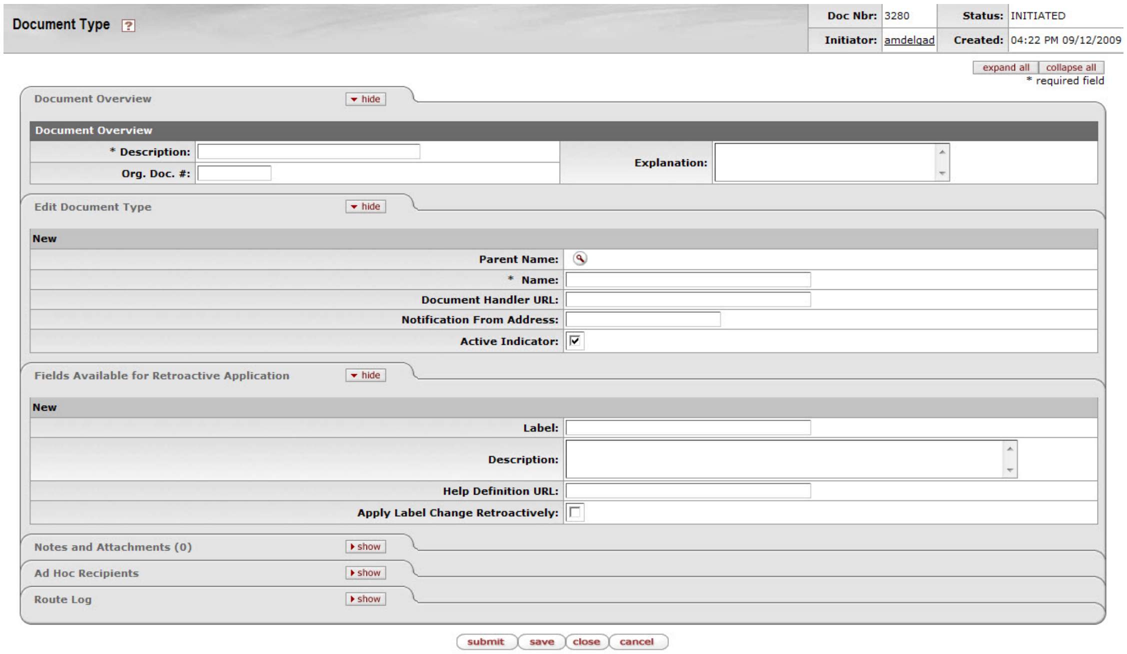
The Document Type document defines basic information about the document types that exist in OLE. It also defines document types specific to workflow and KIM. Many definitions of a document type not defined here are included in its workflow process definition and the data dictionary (a technical resource). The workflow process definition for a document type can be viewed using the Document Type lookup.

Note

For more information about workflow, see the OLE Workflow Overview and Key Concepts on the *Guide to OLE Basic Functionality and Key Concepts*.

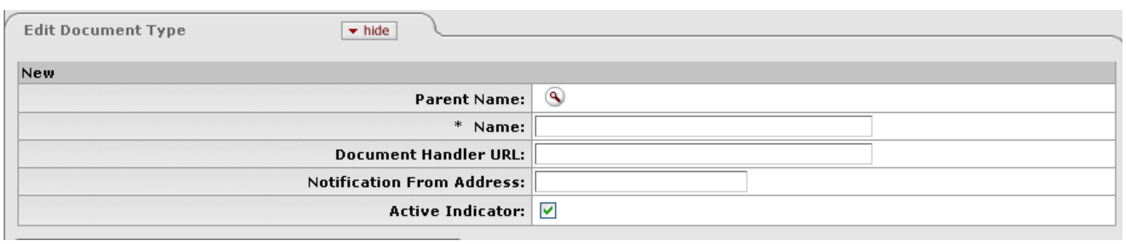
Document Type documents can only be created by members of OLE-SYS Manager or KR-SYS Technical Administrator roles and they do not route for approval.

Document Layout



The Document Type document contains the **Edit Document Type** tab and the **Fields Available for Retroactive Application** tab.

Edit Document Type Tab



Edit Document Type tab definition

Title	Description
Parent Name	Required. Every document type must answer to another document type in a parent/child relationship. Use the lookup to search for the document type to which this document type will answer. Document types can inherit important definitions from their parent document types, including permissions and responsibilities.
Name	Required. The common name of the document type. For most OLE documents the name is a four-character abbreviation. Note that while the name field can support longer names (and KEW and KIM documents are examples of these) the Labor Ledger and General Ledger can only support document names up to four characters in length. If you are creating a new document type that will eventually populate the ledgers be sure to abide by this four character convention.
Document Handler URL	Optional. (Technical) Identifies the basic URL that will take a user to this document type.
Notification From Address	Optional. The email address that will appear as the 'From' address on any action list notifications sent by workflow for this document type.

	This allows several applications using workflow to maintain separate notification email addresses.
Active	Required. The box should be checked if the document type is active and available for use. Uncheck the box to inactivate the document type. Note that you cannot post labor or General Ledger OLE entries with inactive document types.

Fields Available for Retroactive Application Tab

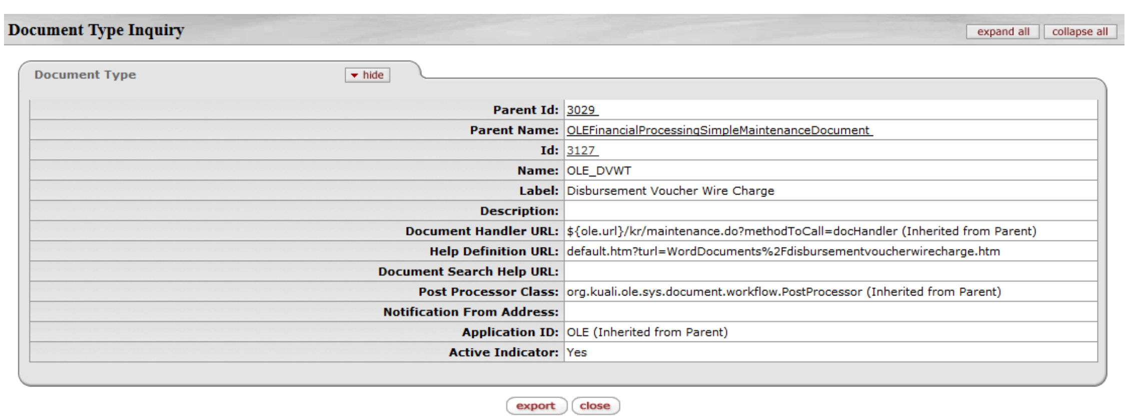
These are Document Type definitions that can be edited retroactively if need be. This means that should you decide to change one of these values for a given document type it is possible to apply the change retroactively to any documents of this type already created. For example, if you decided to change the Label of the Budget Adjustment document type you could choose to have that label change apply to historical Budget Adjustment documents in your OLE system.

Fields Available for Retroactive Application tab definition

Title	Description
Label	The Label appears in most places where document types are displayed in results (including the action list and document search screens) and is commonly longer than the document Name, which is often an abbreviation.
Description	Optional. A text description of this document type.
Help Definition URL	Optional. (Technical) Identifies the URL where the online help content for this document type resides.
Apply Label Change Retroactively	Optional. Check this box only when updating an existing document type and only if you wish the fields on this tab to be updated on previously created versions of documents of this type.

Document Type Inquiry

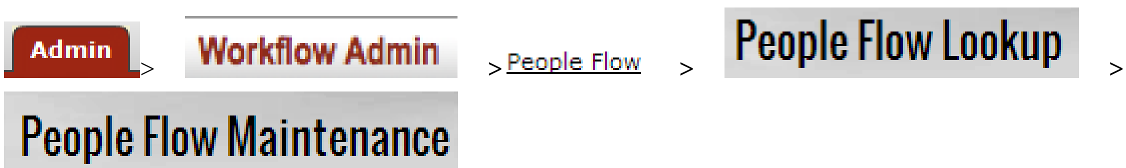
The Document Type Inquiry contains some additional fields that are not defined on this document but referenced from their source (either the corresponding workflow process definition or data dictionary information). These fields are defined below.



Document Type Inquiry definition

Title	Description
Parent ID	Display only. The unique, system-generated ID number that identifies the parent document of this Document Type.
ID	Display only. The unique, system-generated ID number that identifies this document type.
Post Processor Class	Display only. (Technical.) Identifies the post processor this document type calls upon reaching a completed workflow status (usually 'Final' or 'Processed'). The post processor is the code that tells OLE what tables to update when a document is approved.
Application ID	Display only. The namespace (large functional category) that is associated with this document type.

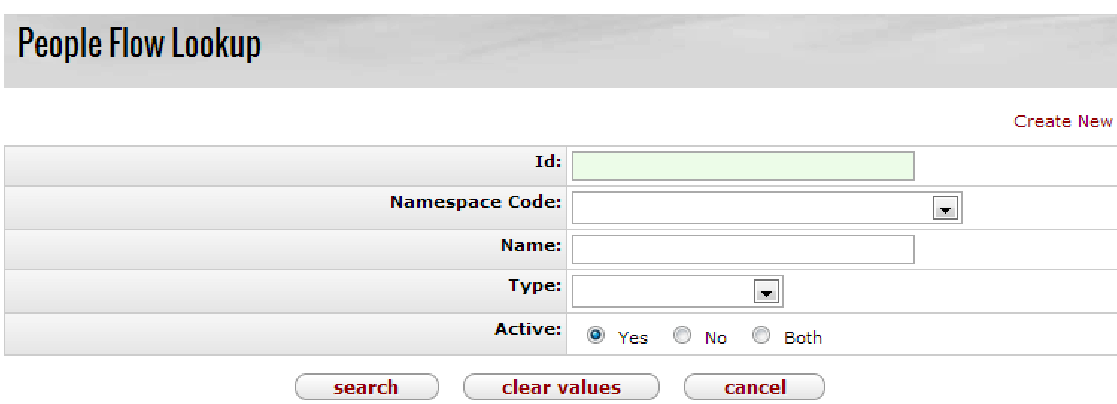
PeopleFlow



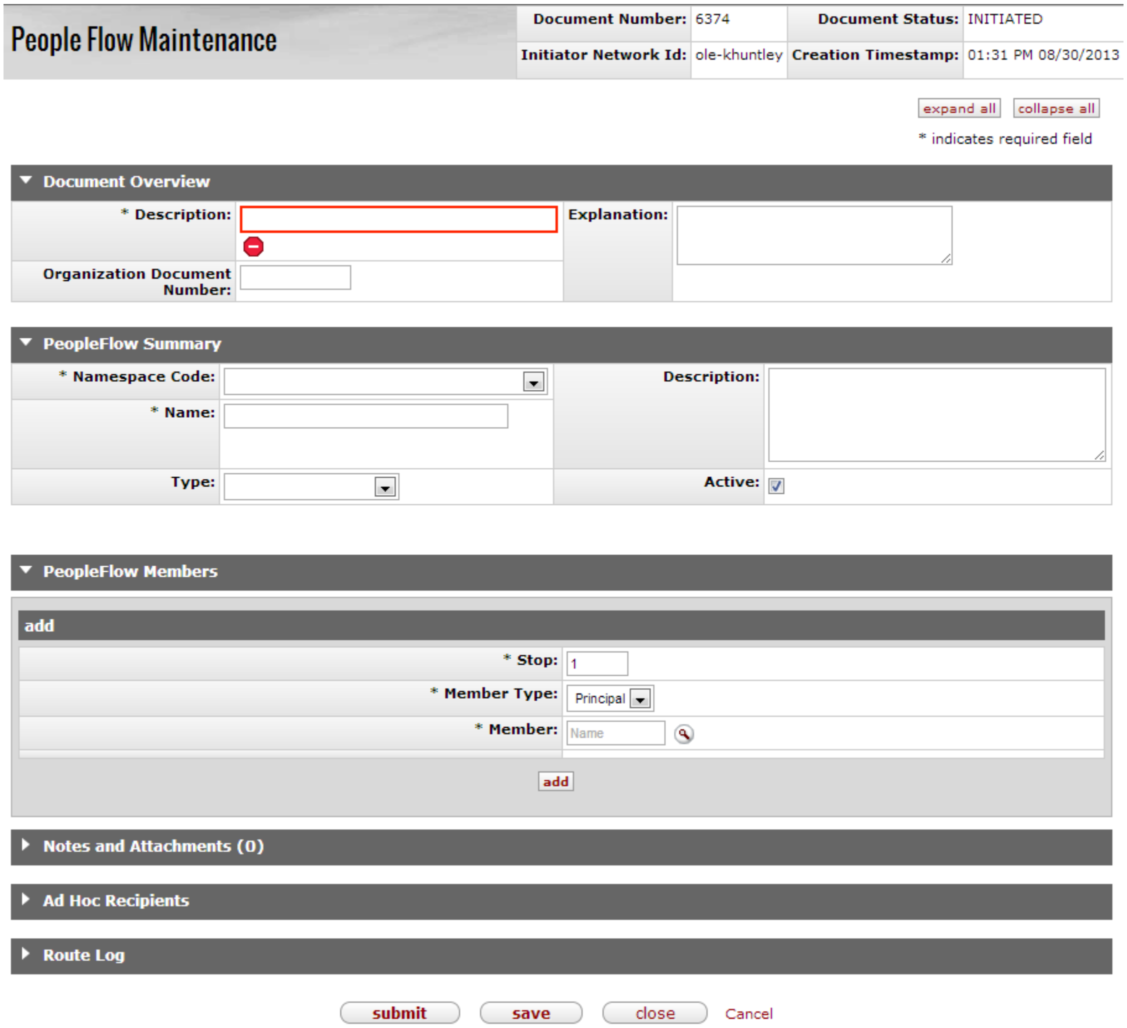
PeopleFlow is, for all intents and purposes, a prioritized list of people to send requests to. It does not require you to specify a hard coded route node in the document type for each individual who might need to approve or be notified. You can define "Stops" in a PeopleFlow, where everything in the same stop proceeds in parallel, but all must be done within the stop before proceeding to the next stop. You can call/execute a PeopleFlow from within a KEW workflow node directly, or you can invoke the Kuali Rules Management System (KRMS) engine from an application and any PeopleFlows that get selected during rule execution, defined in a KRMS agenda, will be called. In this way, you can integrate business rules across applications and workflows. The same PeopleFlow that defines a routing order among a set of persons, groups or roles can be called by KRMS rules, with the KRMS rules defining which type of request to pass to the PeopleFlow.

Getting Started

You can search for a PeopleFlow to copy from and modify (be sure to give it a new unique name) or can create a new one (see the top right of the lookup screen).



Document Layout



The PeopleFlow document includes several unique tabs—**PeopleFlow Summary** and **PeopleFlow Members**.

PeopleFlow Summary Tab

The **PeopleFlow Summary** tab contains information in which to both identify the PeopleFlow and where the PeopleFlow is applicable.

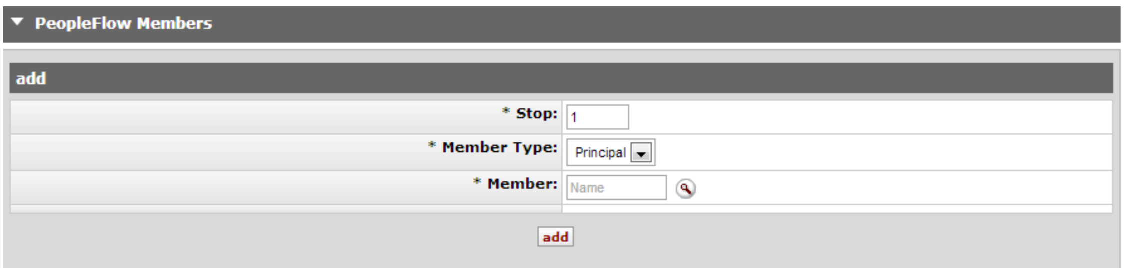
PeopleFlow Summary tab definition

Title	Description

Namespace Code	The Namespace to which this PeopleFlow will belong. A Namespace is a way to set both Permissions and Entity Attributes. Each Namespace instance is one level of Permissions and Entity Attributes and is one record in OLE. Select the Namespace from the drop down list.
Name	Required. The name of the PeopleFlow.
Type	Select the type of PeopleFlow from the drop down list to assign the PeopleFlow to more specific attributes.
Description	Enter a description of the PeopleFlow.
Active	Indicates whether this PeopleFlow is active or inactive. Remove the check mark to deactivate.

PeopleFlow Members Tab

The **PeopleFlow Members** tab allows users to add stops and add members to the PeopleFlow. PeopleFlows that you create can be called by rules, with the rules determining whether the PeopleFlow will be called for an action (such as approvals) or for notifications. Enter the required information and click Add.

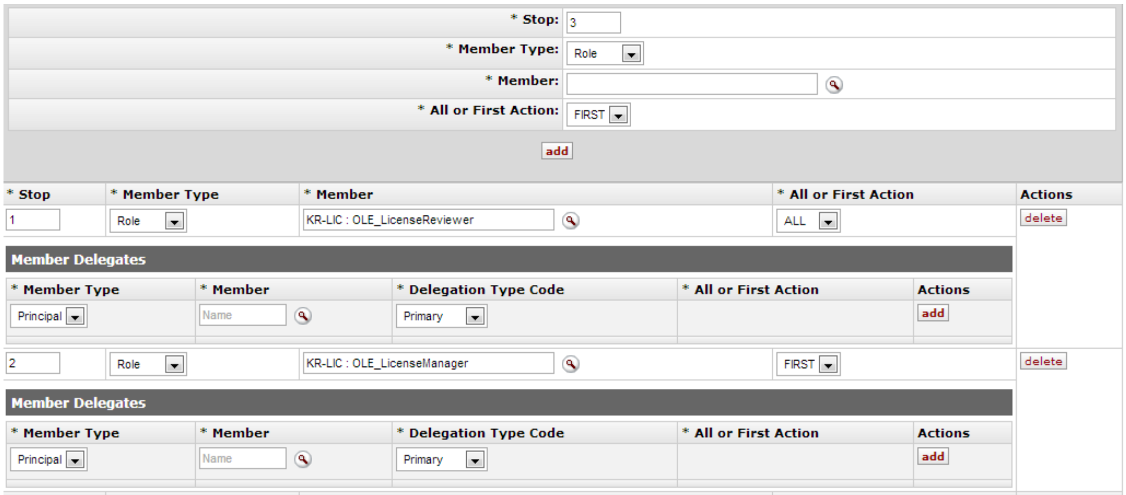


PeopleFlow Summary tab definition

Title	Description
Stop	Required. The stops in the workflow. Everything assigned to each stop must be complete before moving on to the next stop.
Member Type	Required. Select the Member Type from the drop down list. PeopleFlows can be assigned to a Principal, a group, or a role.
Member	Enter the member to be assigned to the PeopleFlow stop or search for them from the lookup .
All or First Action	If the **Member Type** Role or Group is selected, select **ALL** or **FIRST** from the drop down. Selecting ALL means every person in the role or group must take action. Selecting FIRST requires action from only one person.

PeopleFlow Members Tab continued

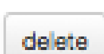
After clicking Add, an additional menu appears. Below shows an example of two stops added already added:



From here, **Member Delegates** may be added to allow others to take action for another person.

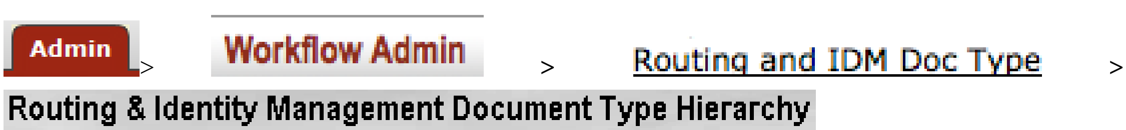
1. Enter the **Member Type** and the **Member**.
2. Select the **Delegation Type Code** from the drop down. The two choices are:
   - **Primary Delegate**: The delegator turns over his or her full authority to a primary delegate. The Action Requests for the delegator only appear in the Action List of the primary delegate.
   - **Secondary Delegate**: The secondary delegate acts as a temporary backup and has the same authority as the delegator when the delegator is not available to take action. Documents appear in the Action Lists of both the delegator and the delegate. When either acts on the document, it disappears from both Action Lists. People often have a secondary delegate who takes care of their action requests when they are out of the office.
3. Select **All of First Action** from the drop down list.
4. Click 

.

Click 

to remove the PeopleFlow stop.

Routing & Identity Management Document Type Hierarchy

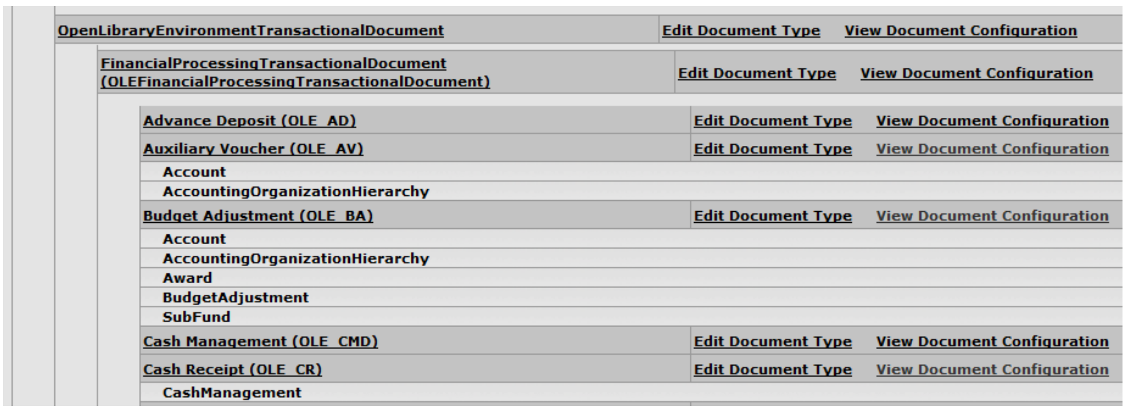


This special view combines KIM data with OLE Document Type Hierarchy. It visually displays the parent and child relationships between OLE document types and the route nodes that are associated with each. Users may also choose to view detailed configuration for each document type, including all KIM permissions and responsibilities related to that document.

Users who are authorized to edit document types, permissions and responsibilities may access these options directly via this screen.

Document Hierarchy View

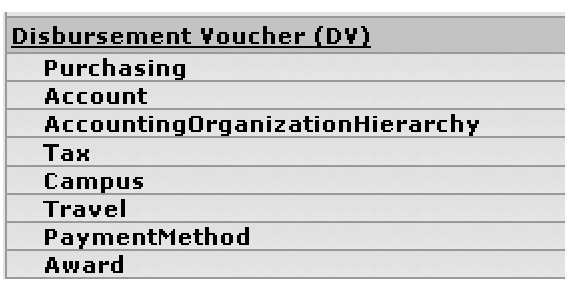
When you access the Routing & Identity Management Document Type Hierarchy screen, the system initially displays the document hierarchy itself. Document types are indented under their parent document types.



To display the Document Type Inquiry for a document, click the document type name.

Users with permissions to edit document types will see an extra link displayed for each type. To initiate an OLE Document Type Maintenance document to edit a document type, click the **Edit Document Type** link for it.

If a given document type does workflow routing, then the system displays the route nodes associated with this type directly below the name of the document. Route nodes are listed in the order in which this document passes through them. Document types with branching routing logic may have further indentation displaying route nodes that a document may only pass through under certain conditions.



Document Configuration View

To open a separate window displaying additional information about a document type, click the **View Document Configuration** link.

Document Configuration - OLE_OBJT

Document Information hide

Name	OLE_OBJT Edit Document Type	**Doc Handler URL**	
Label	Object Code	**Help URL**	default.htm?turl=WordDocuments%2Fobjectcode.htm
Parent Name	OLEChartComplexMaintenanceDocument	**Child Document Types**	

Permissions hide

Gray lines that are stricken through represent inherited permissions that have been overridden by a more specific permission.

hide **Defined For This Document**

Template Name	Permission Name	Detail Values	Granted to Roles

hide **Inherited From: OLEChartComplexMaintenanceDocument**

Template Name	Permission Name	Detail Values	Granted to Roles
Initiate Document (KR-SYS)	Initiate Document (Complex COA) (OLE-SELECT)		OLE-SELECT Financial-AQ4 OLE-SELECT Accounting-AQ4 OLE-SELECT OLE_User OLE-SYS User OLE-SELECT Financial-AQ5
Edit Document (KR-NS)	Edit Document (Complex COA) (OLE-SELECT)	Route Node Name = AdHoc Route Status Code = R	OLE-SELECT Financial-AQ4 OLE-SELECT Accounting-AQ4 KR-WKFLW Approve Request Recipient OLE-SELECT Financial-AQ5

hide **Inherited From: OpenLibraryEnvironmentComplexMaintenanceDocument**

Template Name	Permission Name	Detail Values	Granted to Roles
Edit Document (KR-NS)	Edit Document KFSM AdHoc R (OLE-SYS)	Route Node Name = AdHoc Route Status Code = R	KR-WKFLW Approve Request Recipient

hide **Inherited From: OLE**

Template Name	Permission Name	Detail Values	Granted to Roles
Administer Routing for Document (KR-WKFLW)	Administer Routing for Document KFS (OLE-SYS)		OLE-SYS Workflow Administrator
Blanket Approve Document (KR-WKFLW)	Blanket Approve Document KFS (OLE-SYS)		OLE-SYS Manager
~~Initiate Document (KR-SYS)~~	~~Initiate Document KFS (OLE-SYS)~~	-	~~OLE-SYS User~~
Open Document (KR-NS)	Open Document KFS (OLE-SYS)		KR-WKFLW Initiator or Reviewer OLE-SYS User
Save Document (KR-WKFLW)	Save Document KFS (OLE-SYS)		OLE-SYS System User KR-NS Document Editor
Delete Note / Attachment (KR-NS)	Delete Note / Attachment OLE FALSE (OLE-SYS)	Created By Self Only = FALSE	OLE-SYS Manager
Ad Hoc Review Document (KR-WKFLW)	Ad Hoc Review Document KFS A (OLE-SYS)	Action Request Code = A	OLE-SYS User
Ad Hoc Review Document (KR-WKFLW)	Ad Hoc Review Document KFS F (OLE-SYS)	Action Request Code = F	OLE-SYS Active Faculty or Staff OLE-SYS User
Ad Hoc Review Document (KR-WKFLW)	Ad Hoc Review Document KFS K (OLE-SYS)	Action Request Code = K	OLE-SYS Active Faculty or Staff OLE-SYS User
Copy Document (KR-NS)	Copy Document KFS (OLE-SYS)		KR-SYS Document Initiator
Add Message to Route Log (KR-WKFLW)	Add Message to Route Log KFS (OLE-SYS)		KR-WKFLW Initiator or Reviewer
Recall Document (KR-WKFLW)	Recall Document OLE (OLE-SYS)		
Super User Approve Single Action Request (KR-WKFLW)	Super User Approve Single Action Request OLE (OLE-SYS)		
Super User Approve Document (KR-WKFLW)	Super User Approve Document OLE (OLE-SYS)		
Super User Disapprove Document (KR-WKFLW)	Super User Disapprove Document OLE (OLE-SYS)		
~~Open Document (KR-NS)~~	~~Open Document (OLE-SELECT)~~	-	~~OLE-SELECT OLE_User~~
~~Initiate Document (KR-SYS)~~	~~Initiate OLE Documents (OLE-SELECT)~~	-	~~OLE-SELECT OLE_User~~

hide **Inherited From: KualiDocument**

Template Name	Permission Name	Detail Values	Granted to Roles
Cancel Document (KR-WKFLW)	Cancel Document (KUALI)	Route Node Name = PreRoute	KR-WKFLW Initiator or Reviewer KR-NS Document Editor
Route Document (KR-WKFLW)	Route Document (KUALI)		OLE-SYS System User KR-NS Document Editor
Edit Document (KR-NS)	Edit Kuali ENROUTE Document Node Name PreRoute (KUALI)	Route Node Name = PreRoute	KR-WKFLW Initiator
Edit Document (KR-NS)	Edit Kuali ENROUTE Document Route Status Code R (KUALI)	Route Status Code = R	KR-WKFLW Non-Ad Hoc Approve Request Recipient KR-WKFLW Approve Request Recipient
Add Note / Attachment (KR-NS)	Add Note / Attachment Kuali Document (KUALI)		KR-WKFLW Initiator or Reviewer
View Note / Attachment (KR-NS)	View Note / Attachment Kuali Document (KUALI)		KR-NS Document Opener
Send Ad Hoc Request (KR-NS)	Send FYI Request Kuali Document (KR-SYS)	Action Request Code = F	KR-NS Document Opener
Send Ad Hoc Request (KR-NS)	Send Acknowledge Request Kuali Document (KR-SYS)	Action Request Code = K	KR-NS Document Opener
Send Ad Hoc Request (KR-NS)	Send Approve Request Kuali Document (KR-SYS)	Action Request Code = A	KR-NS Document Editor KR-WKFLW Approve Request Recipient
~~Add Message to Route Log (KR-WKFLW)~~	~~Add Message to Route Log (KUALI)~~	-	-
Send Ad Hoc Request (KR-NS)	Send Complete Request Kuali Document (KR-SYS)	Action Request Code = C	KR-NS Document Opener

Workflow / Responsibilities hide

Gray lines that are stricken through represent inherited responsibilities that have been overridden by a more specific responsibilities.

Exception Routing

Required	Action Details At Role Member Level	Granted to Roles	Inherited
No	No	OLE-SYS Manager	OLE

Route Node: OrganizationHierarchy

Required	Action Details At Role Member Level	Granted to Roles	Inherited
No	Yes	OLE-SYS Organization Reviewer	OLE

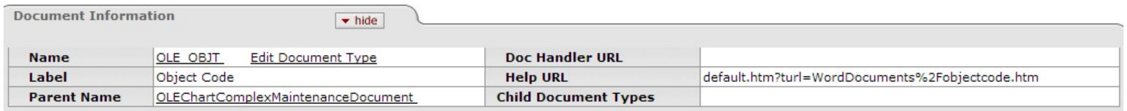
Route Node: Chart

Required	Action Details At Role Member Level	Granted to Roles	Inherited
Yes	No	OLE-SYS University Chart Manager OLE-SYS Chart Manager	OLE

This view includes **Document Information**, **Permissions** and **Workflow / Responsibilities** tabs.

Document Information Tab

This tab provides basic information about the document type. Much of the information here is identical to that available in the Document Type Inquiry.



Document Information ▾ hide

Name	OLE_OBJT Edit Document Type	**Doc Handler URL**	
Label	Object Code	**Help URL**	default.htm?turl=WordDocuments%2Fobjectcode.htm
Parent Name	OLEChartComplexMaintenanceDocument	**Child Document Types**	

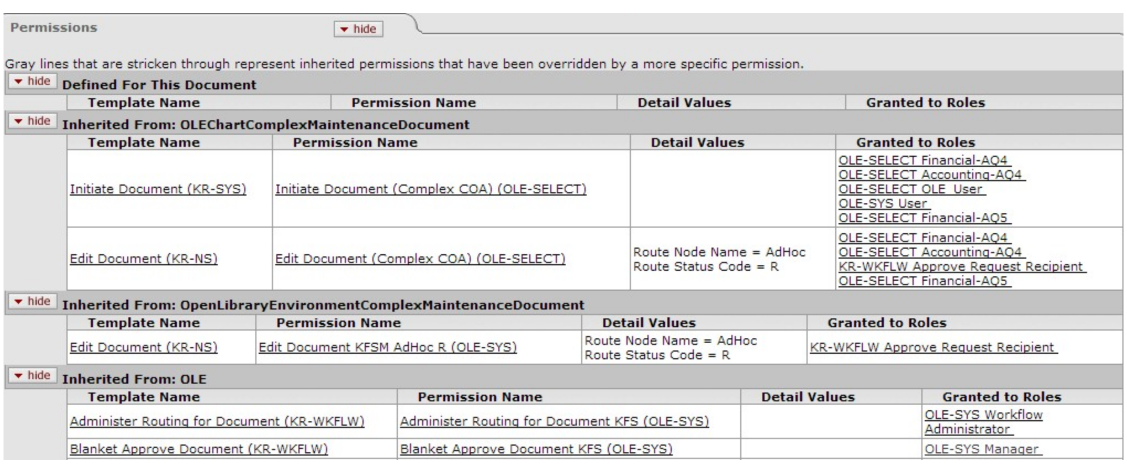
Document Information tab definition

Title	Description
Name	The name that uniquely identifies this type of document. If the user viewing the Configuration screen has permission to edit document type maintenance documents, the system also displays the **Edit Document Type** link.
Label	A longer, more descriptive name for this type of document. In some cases the name and the label may be identical.
Parent Name	The type of document that is the parent to (i.e., higher than) this document type in the document type hierarchy. To display the Document Configuration view for the parent document type, click the linked parent name.
Doc Handler URL	The URL for the document handler associated with this document type. This information is helpful for technical users.
Help URL	The URL for the online help associated with this document type.
Child Document Types	If this document type is a parent, the system displays all of its types for all of its children document types. To see the document configuration view for a child document type, click the link for the desired child document type.

Permissions Tab

This tab identifies the KIM permissions that are invoked by this type of document. Collapsible sections indicate how the document type is associated with each permission.

The **Defined for This Document** section lists permissions that specifically refer to this document type. But many document types receive most, if not all, their associated permissions by inheriting them from parent document types. Additional tabs display this inherited information and the name of the document type from which the permissions are inherited. For example, in the screenshot below, this document type inherits permissions from both OLEChartComplexMaintenanceDocument and OpenLibraryEnvironmentComplexMaintenanceDocument.



Permissions ▾ hide

Gray lines that are stricken through represent inherited permissions that have been overridden by a more specific permission.

▾ hide **Defined For This Document**

Template Name	Permission Name	Detail Values	Granted to Roles

▾ hide **Inherited From: OLEChartComplexMaintenanceDocument**

Template Name	Permission Name	Detail Values	Granted to Roles
Initiate Document (KR-SYS)	Initiate Document (Complex COA) (OLE-SELECT)		OLE-SELECT Financial-AQ4 OLE-SELECT Accounting-AQ4 OLE-SELECT OLE_User OLE-SYS User OLE-SELECT Financial-AQ5
Edit Document (KR-NS)	Edit Document (Complex COA) (OLE-SELECT)	Route Node Name = AdHoc Route Status Code = R	OLE-SELECT Financial-AQ4 OLE-SELECT Accounting-AQ4 KR-WKFLW Approve Request Recipient OLE-SELECT Financial-AQ5

▾ hide **Inherited From: OpenLibraryEnvironmentComplexMaintenanceDocument**

Template Name	Permission Name	Detail Values	Granted to Roles
Edit Document (KR-NS)	Edit Document KFSM AdHoc R (OLE-SYS)	Route Node Name = AdHoc Route Status Code = R	KR-WKFLW Approve Request Recipient

▾ hide **Inherited From: OLE**

Template Name	Permission Name	Detail Values	Granted to Roles
Administer Routing for Document (KR-WKFLW)	Administer Routing for Document KFS (OLE-SYS)		OLE-SYS Workflow Administrator
Blanket Approve Document (KR-WKFLW)	Blanket Approve Document KFS (OLE-SYS)		OLE-SYS Manager

Because more specific permissions override more general ones, some listed permissions may not apply. The system displays overridden permissions as gray strike-through text. In the example below the 'Initiate Document' permission inherited from OLE is overridden by a more specific permission displayed in **Inherited From: OLEChartComplexMaintenanceDocument** section.

Defined For This Document

Template Name	Permission Name	Detail Values	Granted to Roles

Inherited From: OLEChartComplexMaintenanceDocument

Template Name	Permission Name	Detail Values	Granted to Roles
Initiate Document (KR-SYS)	Initiate Document (Complex COA) (OLE-SELECT)		OLE-SELECT Financial-AQ4 OLE-SELECT Accounting-AQ4 OLE-SELECT OLE User OLE-SYS User OLE-SELECT Financial-AQ5
Edit Document (KR-NS)	Edit Document (Complex COA) (OLE-SELECT)	Route Node Name = AdHoc Route Status Code = R	OLE-SELECT Financial-AQ4 OLE-SELECT Accounting-AQ4 KR-WKFLW Approve Request Recipient OLE-SELECT Financial-AQ5

Inherited From: OpenLibraryEnvironmentComplexMaintenanceDocument

Template Name	Permission Name	Detail Values	Granted to Roles
Edit Document (KR-NS)	Edit Document KFSM AdHoc R (OLE-SYS)	Route Node Name = AdHoc Route Status Code = R	KR-WKFLW Approve Request Recipient

Inherited From: OLE

Template Name	Permission Name	Detail Values	Granted to Roles
Administer Routing for Document (KR-WKFLW)	Administer Routing for Document KFS (OLE-SYS)		OLE-SYS Workflow Administrator
Blanket Approve Document (KR-WKFLW)	Blanket Approve Document KFS (OLE-SYS)		OLE-SYS Manager
~~Initiate Document (KR-SYS)~~	~~Initiate Document KFS (OLE-SYS)~~	-	~~OLE-SYS User~~
Open Document (KR-NS)	Open Document KFS (OLE-SYS)		KR-WKFLW Initiator or Reviewer OLE-SYS User

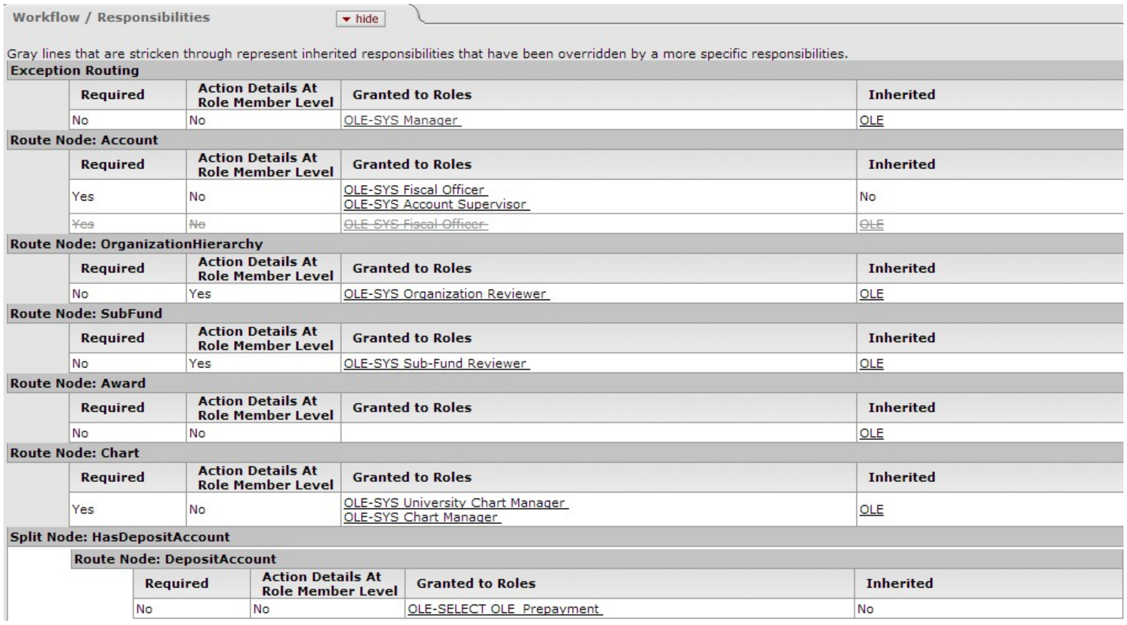
Permissions tab definition

Title	Description
Template Name	Display only. The name of the permissions template on which this permission is based. The template often defines, in a broad sense, what the permission controls. Similar types of permissions have the same template.
Permission Name	Display only. The name of this permission. In most cases the permission name is the same as the associated template name. **Note** Permission names are generally not unique because they describe types of authorization that may appear in many places throughout the application.
Detail Values	Display only. Additional detailed information that, when taken with the permission name, defines the permission's function.
Granted to Roles	Display only. The roles (i.e., the namespace and name of each role) associated with this permission. In some cases multiple roles may be associated with the same permission. To view the Role Inquiry, click the linked name of the desired role.

Workflow / Responsibilities Tab

This tab identifies the route nodes associated with this document type and displays critical information about the KIM responsibilities associated with them.

On this tab, the system displays route nodes in the order in which the document passes through them. The system also displays responsibility information for the Exception Routing node that will be invoked for this document type only if the document encounters an error that prevents it from completing its normal routing.



Responsibility information is presented for each route node in a standard format.

Workflow / Responsibilities tab definition

Title	Description
Required	Display only. A Yes or No value that indicates whether this responsibility must generate action requests for this document type. If the value is 'Yes' and the document generates no requests associated with this responsibility, then the document goes into exception status. If the value is 'No' and the responsibility generates no action requests, the document continues to route as normal.
Action Details at Role Member Level	Display only. A Yes or No value that indicates where the details of this workflow action request are defined. If the value is 'Yes,' the system collects action details when members are assigned to the role. If the value is 'No,' the system collects action details when this responsibility is assigned to a role.
Granted to Roles	Display only. The roles (that is, the namespace and name of each role) associated with the responsibility at this route node. To view the Role Inquiry, click the linked name of the desired role.
Inherited	Display only. Indicates whether this responsibility is inherited from another document type. If the value is 'No,' the responsibility is specifically associated with this document type. If a document type name appears here, the responsibility is inherited from the specified document type. To view the Document Configuration Inquiry for this document type, Click the linked name.

Rule Attribute

Rule attributes are a core KEW data element contained in a document that controls its Routing. It participates in routing as part of a Rule Template and is responsible for defining custom fields that can be rendered on a routing rule. It also defines the logic for how rules that contain the attribute data are evaluated.

Technical considerations for a Rule Attribute are:

They might be backed by a Java class to provide lookups and validations of appropriate values.

Define how a Routing Rule evaluates document data to determine whether or not the rule data matches the document data.

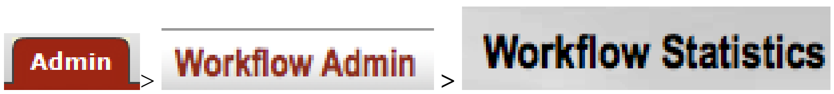
Define what data is collected on a rule.

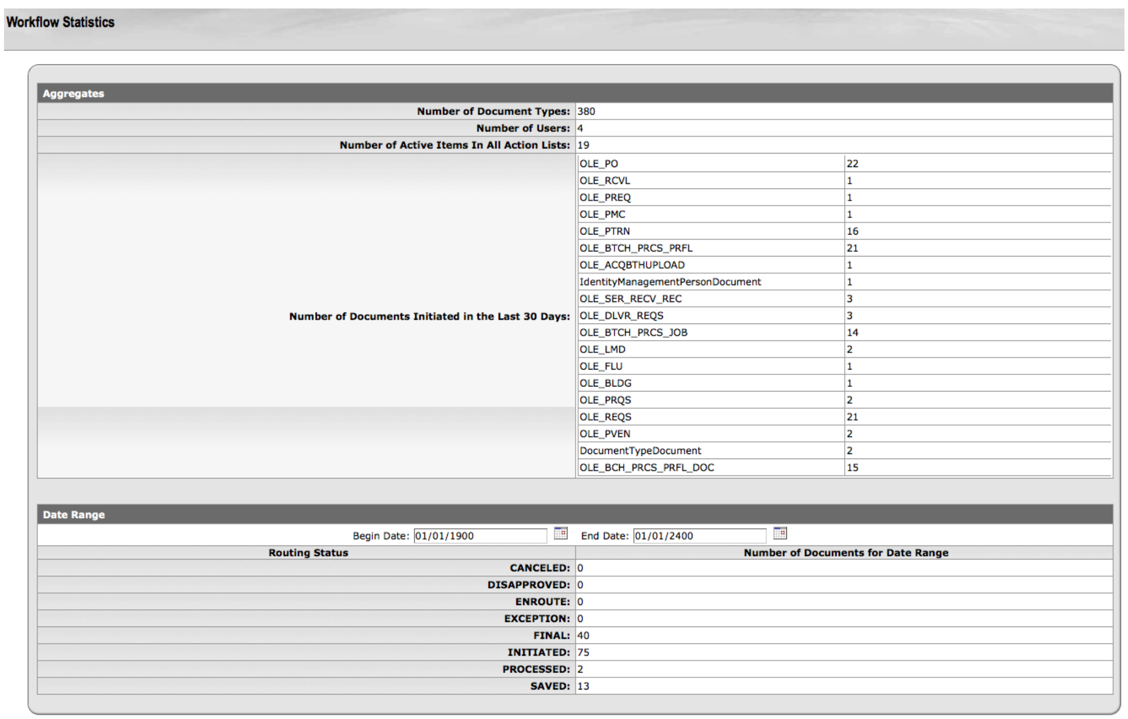
An attribute typically corresponds to one piece of data on a document (i.e dollar amount, department, organization, account, etc.).

Can be written in Java or defined using XML (with matching done by XPath).

Can have multiple GUI fields defined in a single attribute.

Statistics




Workflow Statistics

Aggregates

Number of Document Types:	380	
Number of Users:	4	
Number of Active Items In All Action Lists:	19	
Number of Documents Initiated in the Last 30 Days:	OLE_PO	22
	OLE_RCVL	1
	OLE_PREQ	1
	OLE_PMC	1
	OLE_PTRN	16
	OLE_BTCH_PRCS_PRFL	21
	OLE_ACQBTHUPLOAD	1
	IdentityManagementPersonDocument	1
	OLE_SER_RECV_REC	3
	OLE_DLVR_REQS	3
	OLE_BTCH_PRCS_JOB	14
	OLE_LMD	2
	OLE_FLU	1
	OLE_BLDG	1
	OLE_PRQS	2
	OLE_REQS	21
	OLE_PVEN	2
	DocumentTypeDocument	2
	OLE_BCH_PRCS_PRFL_DOC	15

Date Range

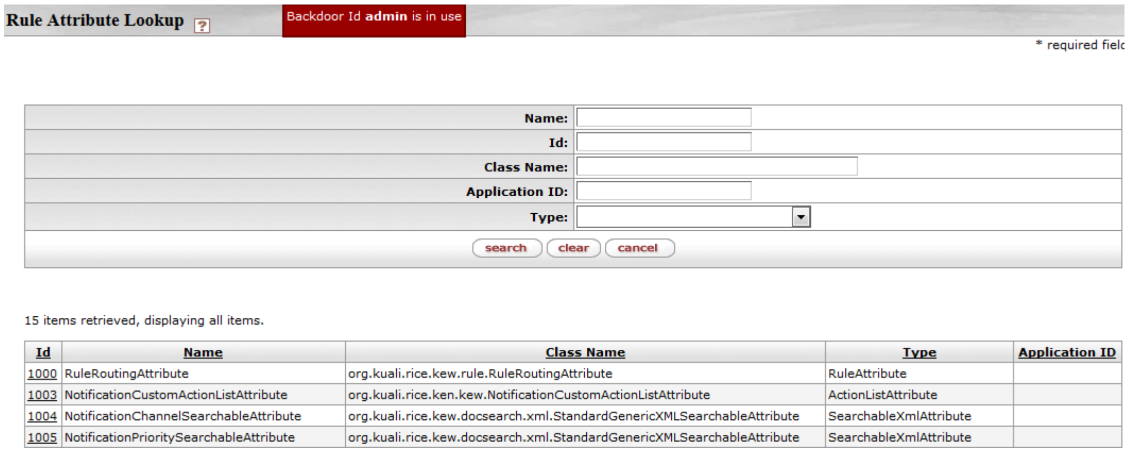
Begin Date: 01/01/1900 End Date: 01/01/2400

Routing Status	Number of Documents for Date Range
CANCELED:	0
DISAPPROVED:	0
ENROUTE:	0
EXCEPTION:	0
FINAL:	40
INITIATED:	75
PROCESSED:	2
SAVED:	13

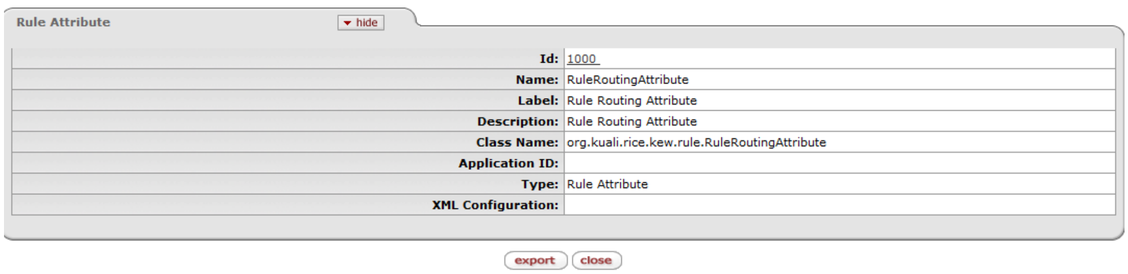
Workflow Attribute

The Rule Definition Lookup allows you to search for and report on workflow rule definitions and export the definition data in XML format. Rule definitions are used by document search and the action list.

This option consists only of a lookup and inquiry screen. There is no document type associated with rule definitions.



Clicking the ID number of a given rule definition will take you to the Rule Definition Inquiry screen.



Click the 

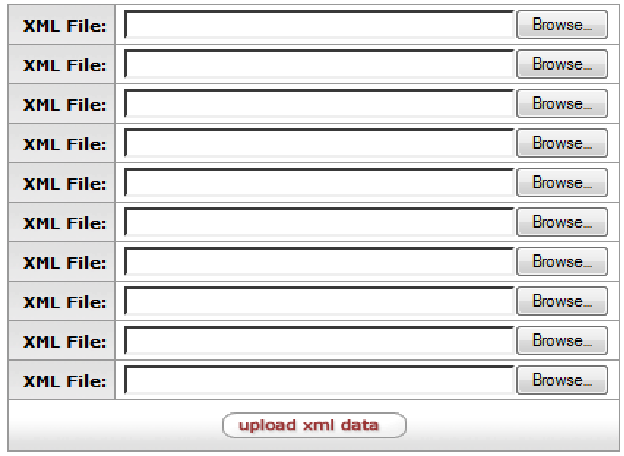
button to download the XML associated with a particular rule definition.

```
<?xml version="1.0" encoding="UTF-8"?>
<data xmlns="ns:workflow" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:schemaLocation="ns:workflow resource:WorkflowData">
  <ruleAttributes xmlns="ns:workflow/RuleAttribute" xsi:schemaLocation=
  "ns:workflow/RuleAttribute resource:RuleAttribute">
    <ruleAttribute>
      <name>RuleRoutingAttribute</name>
      <className>org.kuali.rice.kew.rule.RuleRoutingAttribute</className>
      <label>Rule Routing Attribute</label>
      <description>Rule Routing Attribute</description>
      <type>RuleAttribute</type>
    </ruleAttribute>
  </ruleAttributes>
</data>
```

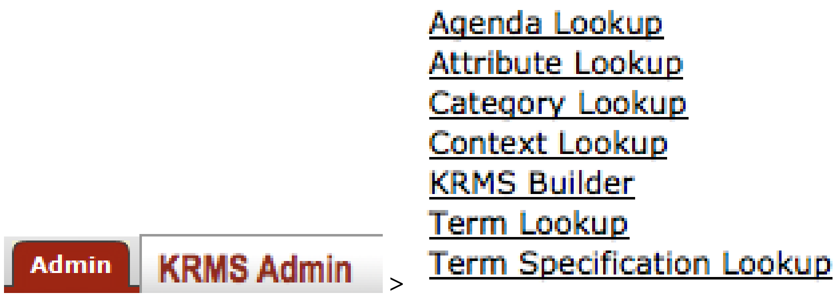
XML Import

The XML Ingester allows you to upload the XML file to the KEW server. These XML files might include workflow process definition files or rule definition files.

Ingester

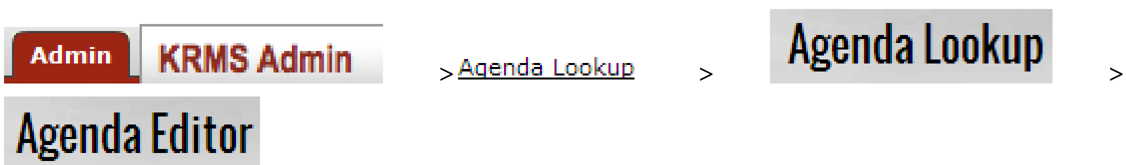

XML File:
Browse...
XML File:
Browse...
XML File:
Browse...
XML File:
Browse...
XML File:
Browse...
XML File:
Browse...
XML File:
Browse...
XML File:
Browse...
XML File:
Browse...
XML File:
Browse...
upload xml data

Chapter 6. KRMS Administrative Documents



The KRMS submenu allows you to perform a variety of functional and technical activities that affect the entire system.

Agenda Lookup

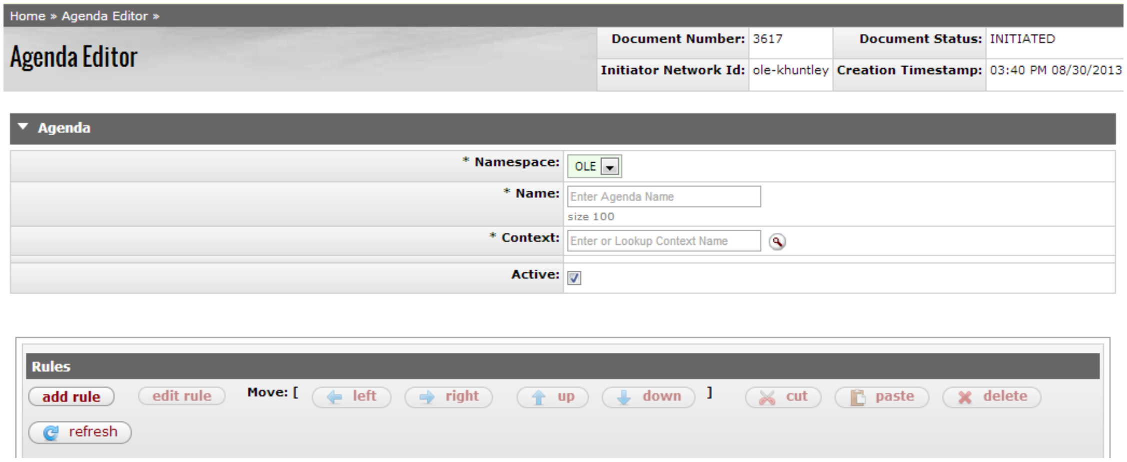


Rules in KRMS are placed into ordered sets called Agendas. The order of the Rules in an Agenda determines the sequencing: which rule gets evaluated first, second and so on. The Agenda also enables you to include conditional branching logic between Rules. In turn, Agendas are created in Contexts, which may represent any categories that are relevant within your institution. For example, they could correspond to document types or business processes or any other categories, such as licensing. Each Context contains its own agendas, and each Agenda contains its own rules. Rules aren't shared across agendas (though you can copy/paste, they become unique Rule instances), and Agendas aren't shared across Contexts. There is no Context hierarchy, that is, Agendas and Rules cannot be inherited across contexts within any sort of hierarchy.

Tip

Copy rules to save time and typing.

Document Layout



The Agenda Editor includes two unique tabs—**Agenda** and **Rules**.

Agenda Tab

The **Agenda** tab contains information in which to both identify the Agenda itself and where the Agenda will be applied.

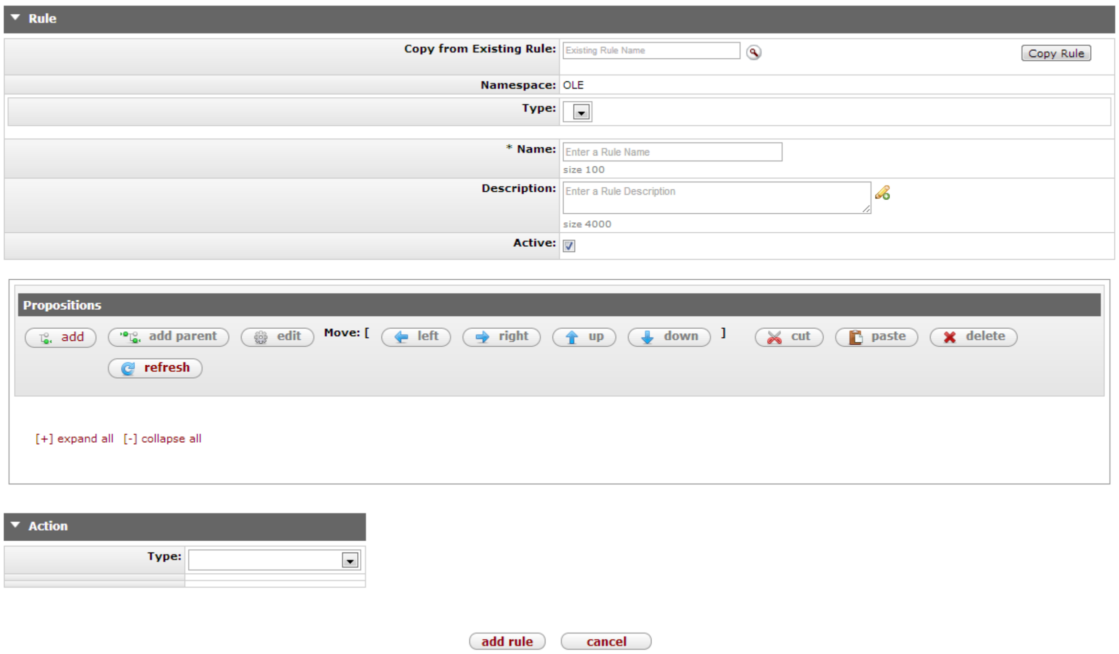
Agenda tab definition

Title	Description
Namespace	Required. The Namespace to which this Agenda will belong.
Name	Required. The name of the Agenda. This is a unique identifier and must be unique to the namespace selected.
Context	Required. A collection of agendas, rules, terms, term specifications. Enter a Context or search for it from the lookup .
Type	Select the type of Agenda from the drop down list to assign the Agenda to more specific attributes.
Active	Indicates whether this Agenda is active or inactive. Remove the check mark to deactivate.

Rules tab

From the **Rules** tab, users can add multiple rules to an agenda, move rules around in the workflow, and can cut, paste and delete.

Click **add rule** to open the Rule editor and add a rule. If a rule is already listed, select the rule and click **edit rule**. The Rule Editor will open. The Rule Editor includes two unique tabs—**Rule** which also contains the **Propositions** subtab and **Action**.



Rule

Fill in the descriptive information for the rule in the **Rule** tab

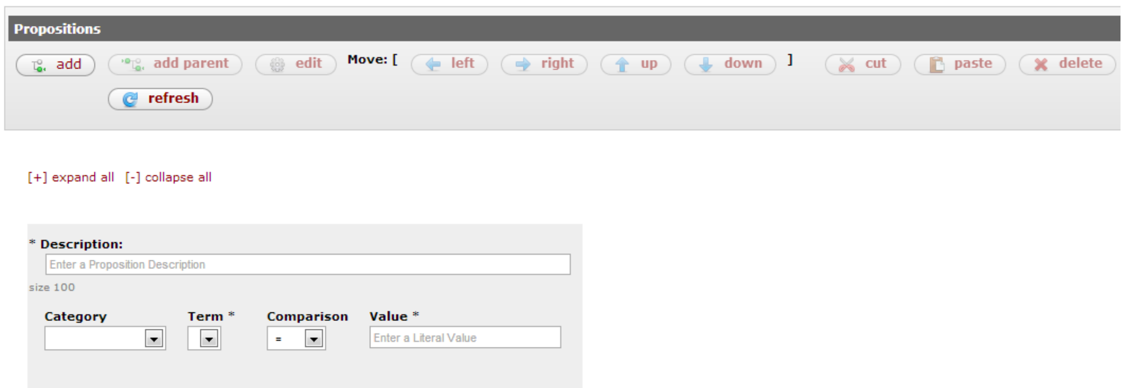
Rule tab definition

Title	Description
Copy from Existing Rule	If a similar rule already exists, you may enter the name or search for the rule from the lookup 
Namespace	Display only. The Namespace to which this Rule will belong.
Type	Select the type of rule from the drop down list to assign the rule to more specific attributes.
Name	Required. The name of the Rule. This is a unique identifier and must be unique to the namespace selected.
Description	Enter a description for the rule. To expand the description field, click the expand icon .
Active	Indicates whether this rule is active or inactive. Remove the check mark to deactivate.

Add Propositions

Add a simple proposition by clicking  under the **Proposition** tab (click **add parent** to add compound propositions). Propositions are functions made up of true and false conditions. Actions can be set to occur when proposition requirements are met.

Once **add** is clicked, OLE brings up a new set of fields.



Give the proposition a **Description**.

Select a **Category**, **Term**, and **Comparison** from the drop down lists. Categories help to narrow down the terms. Terms define a piece of business data that can be used in the construction of proposition (i.e. student GPA, account number, salary, etc.). Enter the **Value** to set the term (i.e. a student GPA of 4.0, "4.0" is the value)

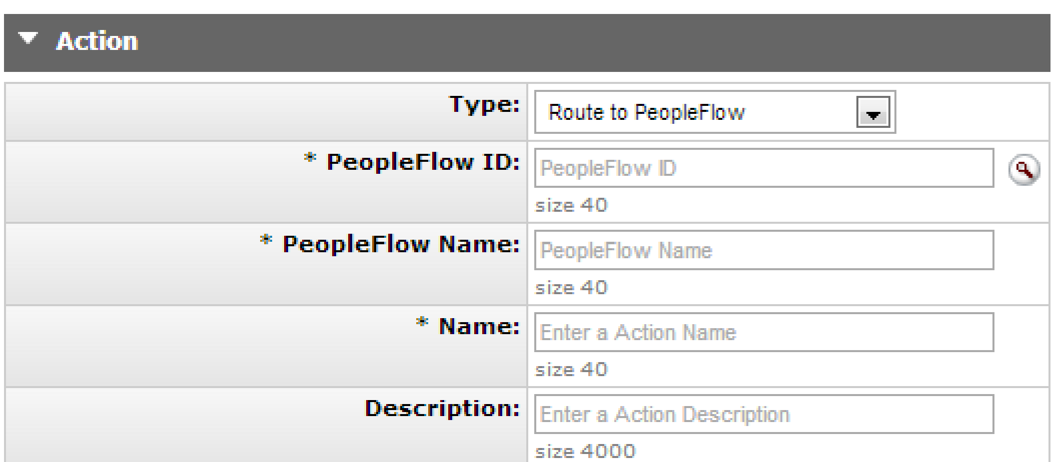
Add Action

In the **Action** tab, users can define the action that will be fired when the **Proposition** is evaluated.

Select the **Type** of action from the drop down menu. Depending on your selection, additional fields will become available.

No matter what Type is selected, enter a **Name**.

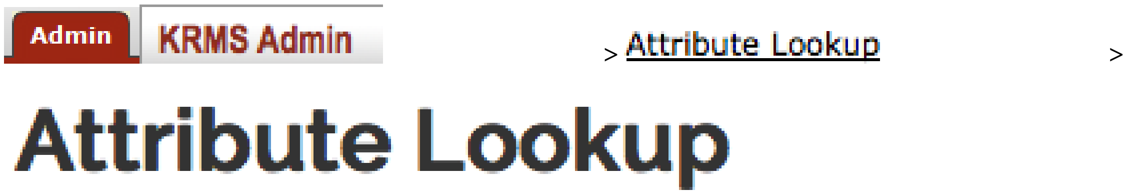
This is an example of the type **Route to PeopleFlow**, which includes additional required fields:



Click  to add this rule to the agenda.

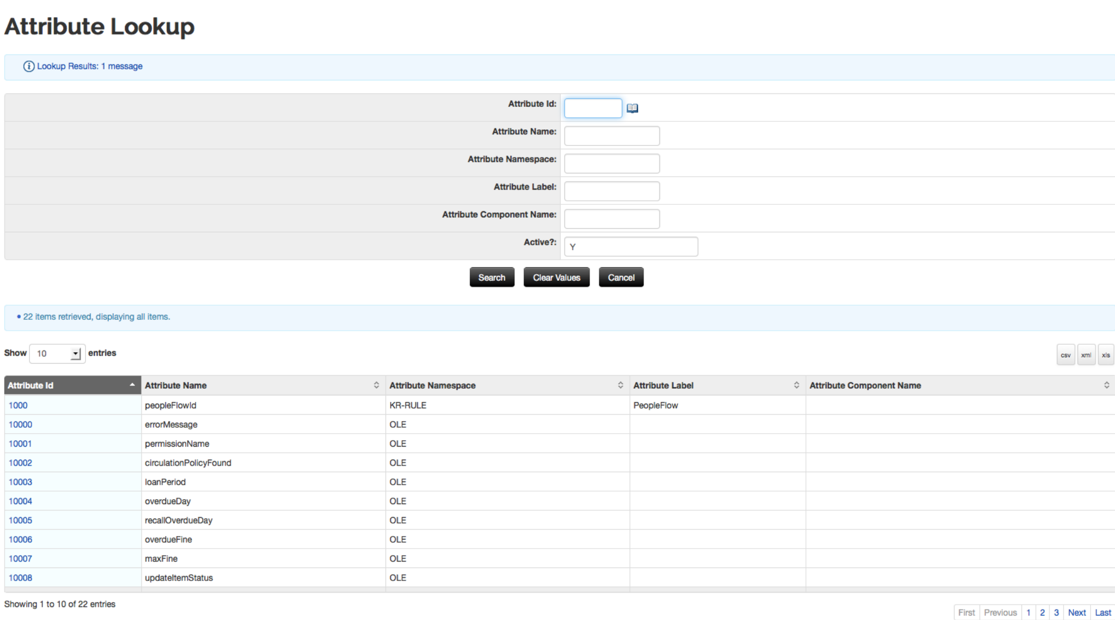
Continue to add as many rules as necessary for the agenda. Once complete click 

Attribute Lookup



The Attribute lookup allows users to search for attributes used within KRMS rules. These are maintained by a system administrator.

Document Layout

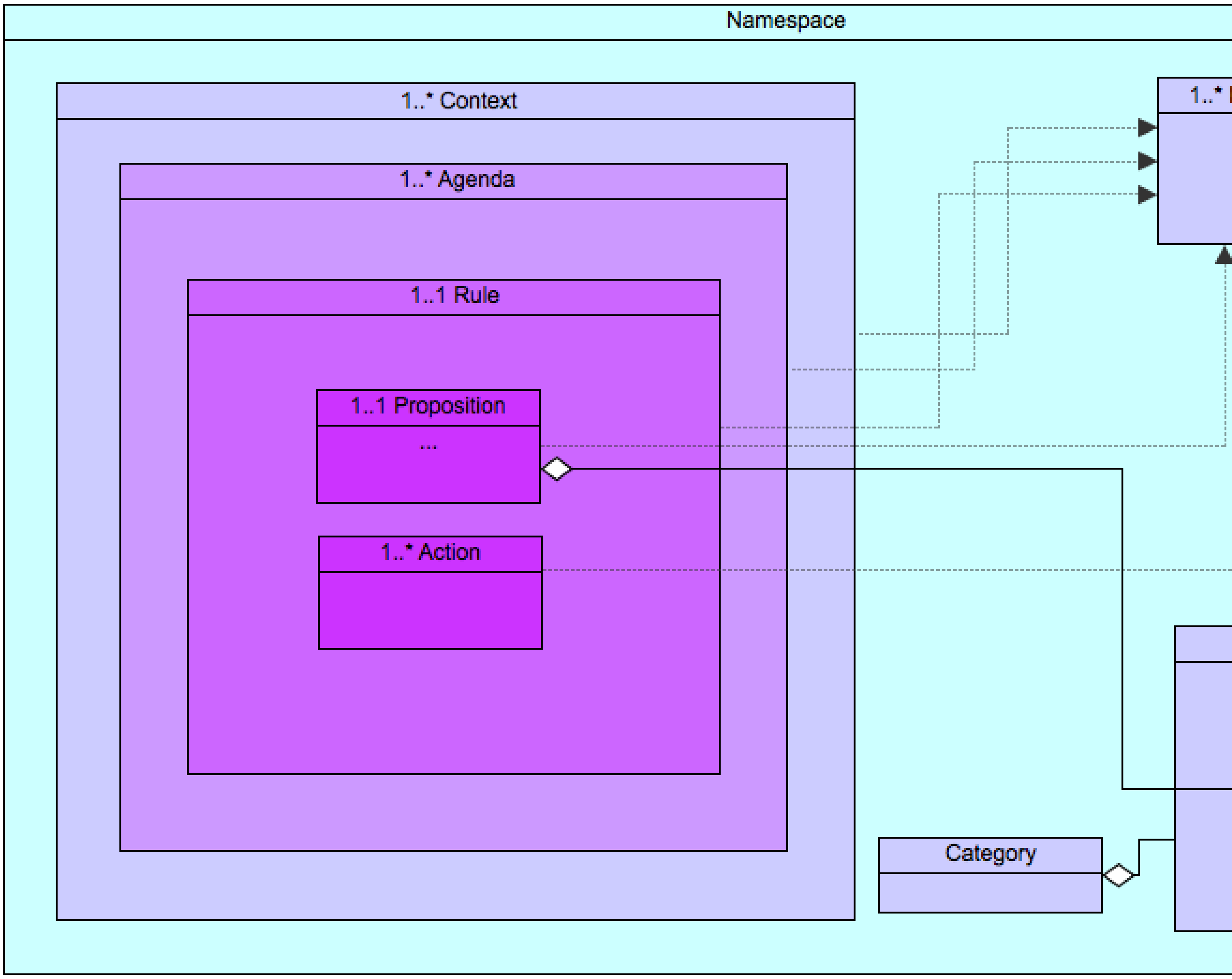


As a function of OLE, you may search for attributes. Execute a blank search to review all of them.

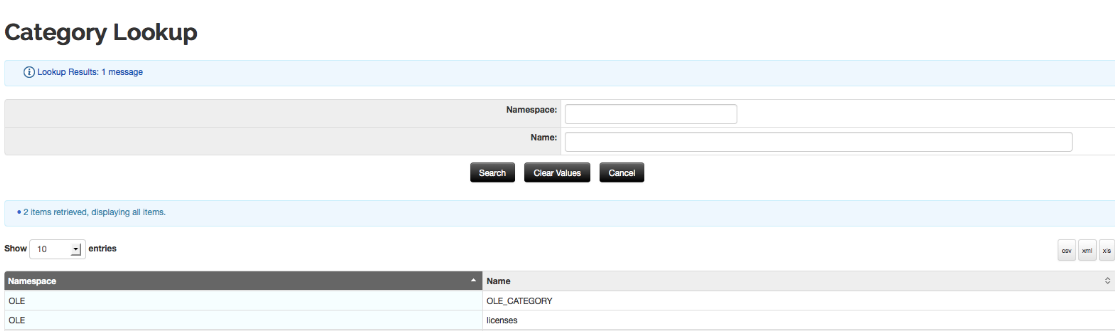
Category Lookup

Categories are related to the Proposition within a KRMS Rule, they distinguish terms and term specifications. To specify new Terms, you will probably want to first create term categories. These are maintained by a system administrator.

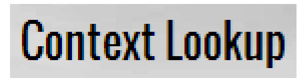
The following diagram outlines the hierarchy of entities in KRMS (note that some entities are omitted)

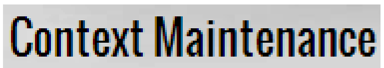


Document Layout



Context Lookup

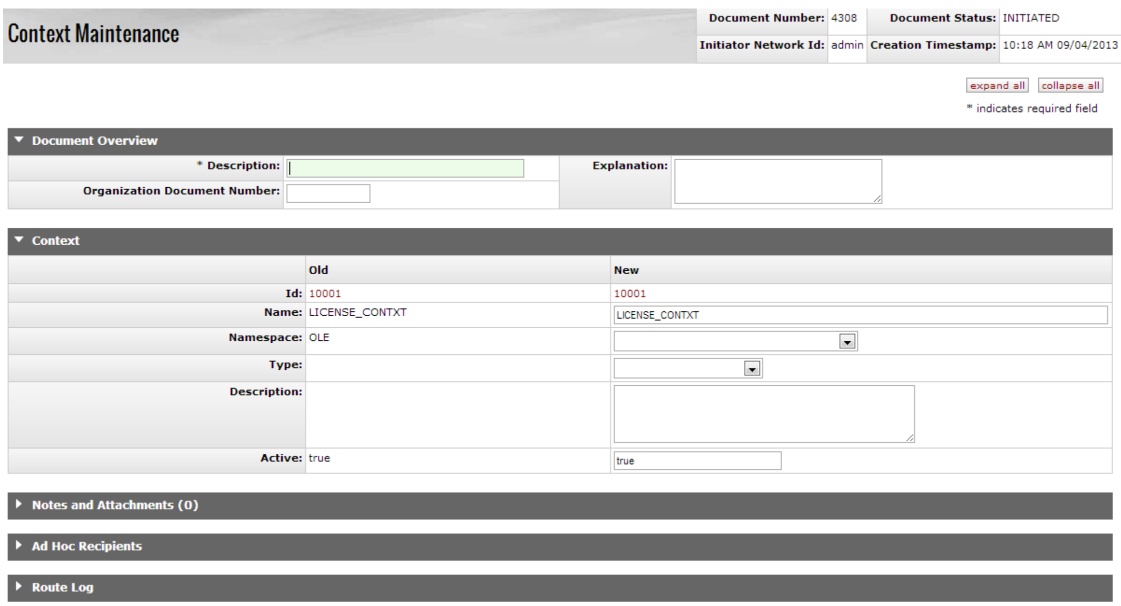
> Context Lookup >


>


Contexts are a collection of agendas, rules, terms, term specifications. In OLE a context of "License" has been established for easy identification of the items related to the licensing business rules.

Each Context contains its own agendas, and each Agenda contains its own rules. Rules aren't shared across agendas (though you can copy/paste, they become unique Rule instances), and Agendas aren't shared across Contexts. There is no Context hierarchy, that is, Agendas and Rules can't be inherited across contexts within any sort of hierarchy.

Document Layout



The Context Maintenance document includes the **Context** tab. The system automatically enters data into both the **Old** and **New** sections. Selected data fields are available for editing.

Context tab definition

Title	Description
Name	The name of the Context. This is a unique identifier and must be unique to the namespace selected.
Namespace	The Namespace to which this Context will belong. Select the namespace from the drop down list.
Type	Select a type from the drop down list to assign the context to more specific attributes.
Description	Enter a description of the context.
Active Indicator	Indicates whether this context is active or inactive. Remove the check mark to deactivate the code.

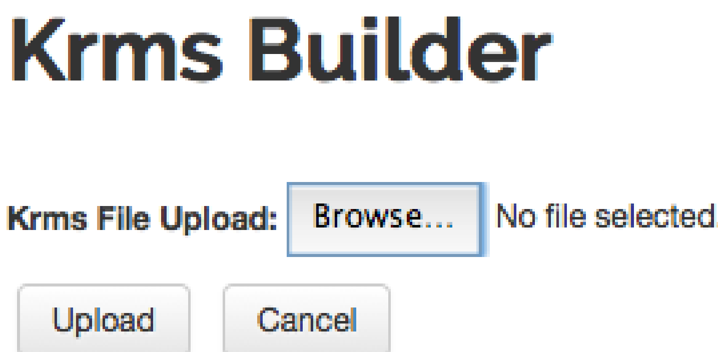
KRMS Builder

> 

>

Kuali's Rule Management System (KRMS) supports the creation, maintenance, storage and retrieval of business rules and agendas (ordered sets of business rules) within business contexts (e.g., for a particular department or for a particular university-wide process). KRMS enables you to define a set of rules within a particular business unit or for a particular set of applications. These business rules define logical conditions and the set of actions that result when those conditions are met. KRMS enables you to call and use this logic from any application, without having to re-write and manage all the rules' maintenance logic within the application.

From the KRMS builder, users with the correct permisssions may upload xml files into OLE.



Term Lookup

> 

>

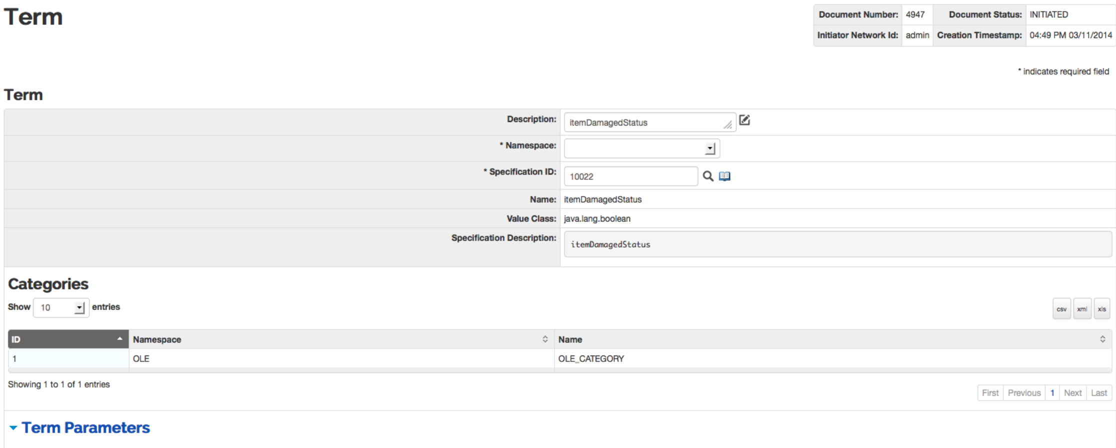
> 

Terms are related to the Proposition within a KRMS Rule. These are maintained by a system administrator.

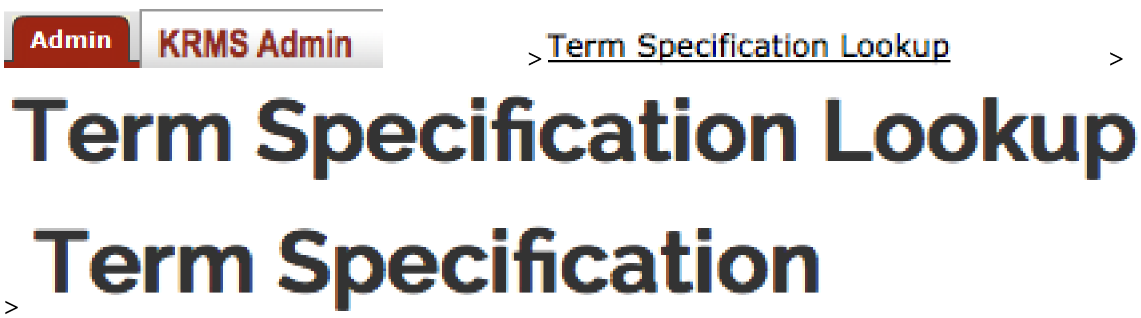
Note

See the diagram under Category for a visual representation of the relation between terms, term specifications, and categories.

Document Layout



Term Specification Lookup

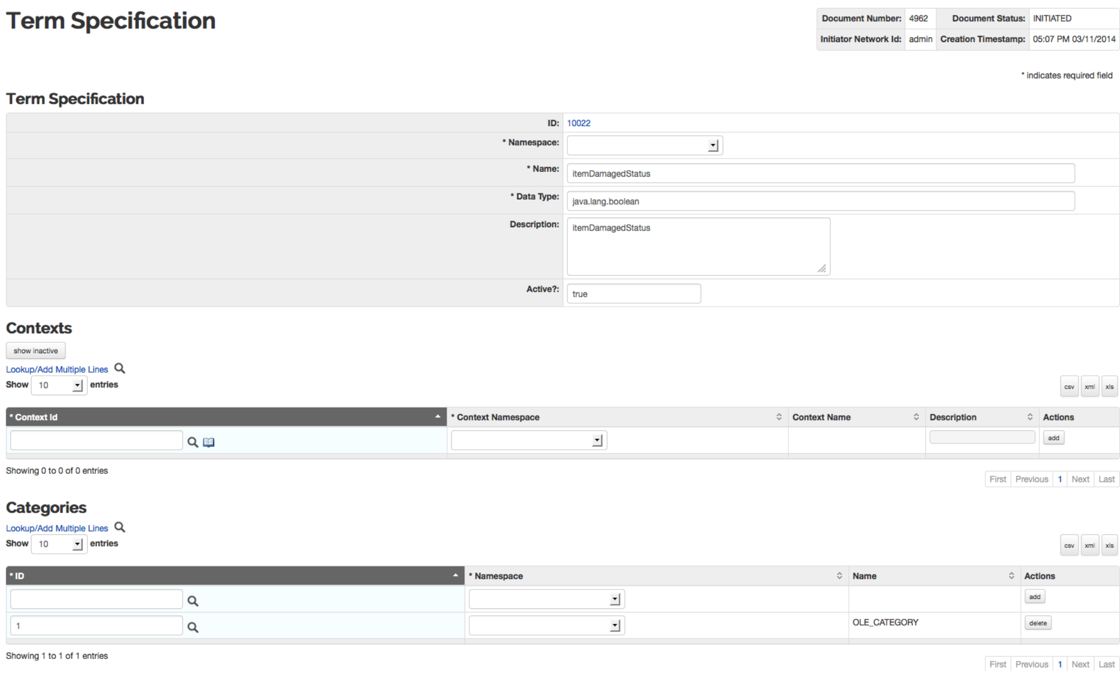


Term Specifications are also related to the Proposition within a KRMS Rule. You will need to create a term specification before creating a term. These are maintained by a system administrator.

Note

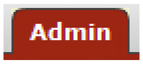
See the diagram under Category for a visual representation of the releation between terms, term specifications, and categories.

Document Layout



As a function of OLE, you may search for categories. Execute a blank search to review all of them.

Chapter 7. System Administration Documents



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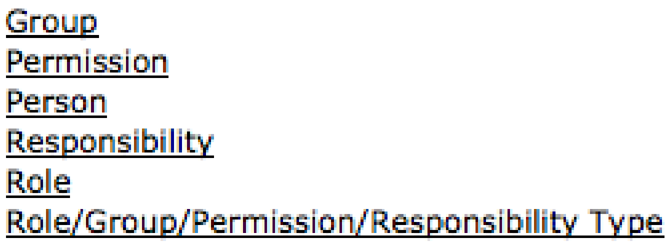


The Identity submenu group provides access to screens in order to establish and maintain user data and the associated roles and permissions in the Kuali Identity Management (KIM) system. This system handles user identification, permissions, and responsibilities for multiple Kuali applications, including OLE. KIM may also be used with non-Kuali applications.

OLE communicates with KIM to determine each user's permissions and workflow responsibilities. These permissions and responsibilities are defined by the user's role or roles in the system. Roles can be customized to handle permissions and responsibilities in a variety of ways based on your institution's needs.

Note

Learn more about KIM functions in the video KIM functions (roles, permissions, responsibilities).

Menu Access to KIM Functions

In OLE, most KIM documents are available from the **Admin** menu tab in the **System** menu group in the **Identity** submenu group. The Routing & Identity Management Document Type Hierarchy is available in the **Configuration** menu group in the **Workflow** submenu group.

The purpose of each document in the **Identity** subgroup in the **System** menu group is explained in the following table.

Basic KIM Concepts

This section introduces KIM permissions, responsibilities, roles, and groups as well as the Routing & Identity Management Document Type Hierarchy tool.

KIM Permissions, Responsibilities, and Roles

Entries in KIM control user permissions to edit a document, to blanket approve transactions, and to perform many other activities in OLE.

KIM also identifies responsibilities that generate workflow action requests in OLE. When a Fiscal Officer approves a financial processing document or a Chart Manager approves a Chart of Accounts maintenance document, the user is acting on a request that has been generated by a responsibility specified in KIM.

In KIM, you do not assign permissions and responsibilities directly to individual users; instead, you associate users with roles, and you give each role an appropriate set of responsibilities and permissions. For example, the Fiscal Officer role includes permission to edit accounting lines on certain en route documents. This role also includes responsibilities that generate requests for the specific actions fiscal officers must take on documents. The Limited Circulation Attendant role includes permissions to view but not make changes to a patron record.

In the base OLE configuration, similar business functions are often grouped into a single role. Your institution may choose to assign permissions and responsibilities differently or even create its own roles to fit its business processes.

In KIM, each user is identified on the KIM Person document. This document identifies the person by a Principal ID and assigns that person to any number of roles. Role assignments may be made via the Person document or the Role document. Some types of roles, called 'derived roles,' automatically determine their members from data in other OLE components. For example, because Fiscal Officer is a definition of the Account in OLE, the Fiscal Officer role derives its assignees based on the data in the Account table. You do not need to assign users to derived roles such as this one.

KIM Groups

Groups provide another important tool in KIM. Groups are an optional feature that allows you to associate persons, roles or other groups with each other for the purpose of making role assignments. For example, if you want to assign the same role to three users, you could create a group, assign the three users to it, and then assign the group to the desired role. (Alternatively, you could add the three users individually to the role. The choice of whether to use a group or assign individual users to roles is entirely yours.)

Routing & Identity Management Document Type Hierarchy Tool

One more tool—the Routing & Identity Management Document Type Hierarchy— is unique to KIM. This tool allows you to view KIM permissions and responsibilities as they relate to specific OLE documents.

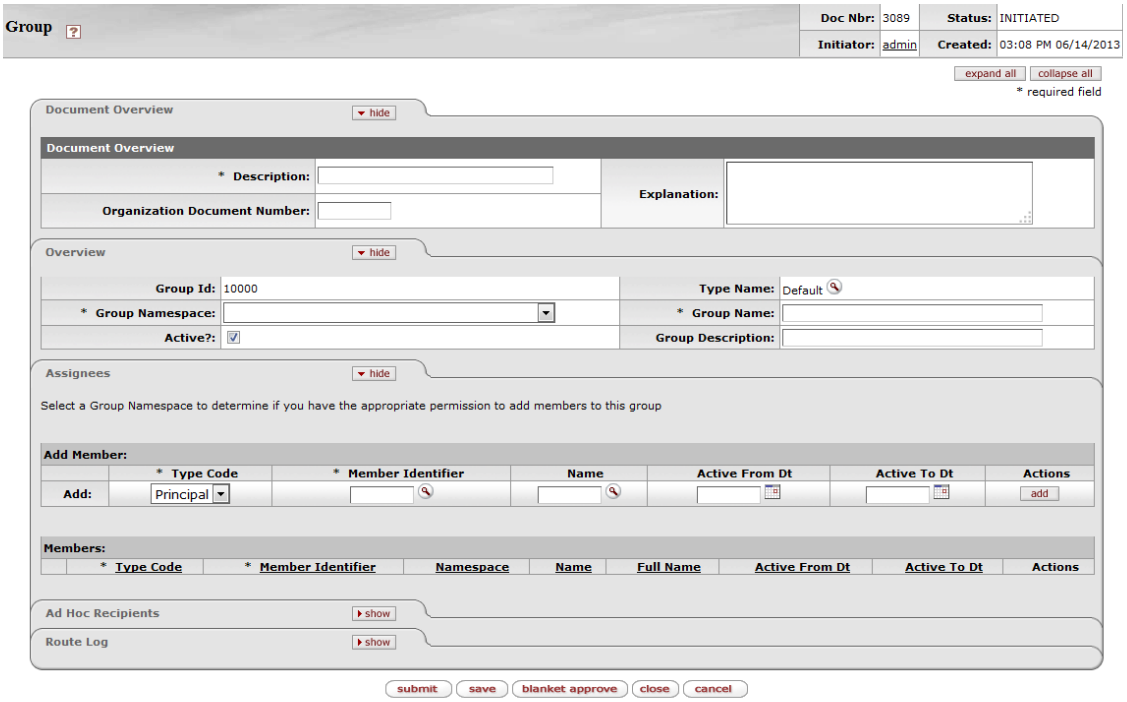
Group

The Group document allows you to associate persons, roles or other groups with each other in order to assign the same role to all group members.

Groups have no inherent permissions or responsibilities of their own. Only by associating a group with a role do the members of that group become associated with permissions and responsibilities.

Document Layout

The Group document includes **Document Overview**, **Overview, Definitions** and **Assignees** tabs.



Overview Tab

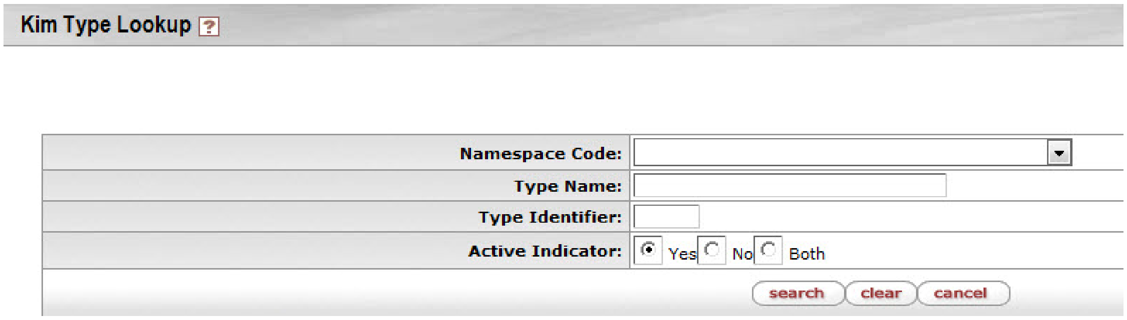
This tab identifies the group with a unique system-assigned ID number, a namespace and a name. Each group also has a type that specifies any qualifiers that this group might require.

Overview tab definition

Title	Description
Group ID	Display only. The unique system-assigned ID number that identifies this group. The system completes this field when you submit the document.
Type Name	Required. The type of definitions that will be associated with this group. Some group types, such as the Default Type, require no definitions to be collected. **Note** When creating a new group, you must select the Type before the system can generate the document. See below.
Group Namespace	Required. An indicator that associates the group with a particular application and module.
Group Name	Required. The common descriptive name by which this group is known.
Active	Check this box to indicate that this Group is active and is a valid choice for assigning to roles. Uncheck the box to indicate that this group is inactive (no longer valid when making role assignments).
Group Description	Additional description field for the group.

Type Name

When you click the lookup button, the system displays the KIM Type Lookup screen. You must search for and select an existing Type in order for the system to generate a new Group document.

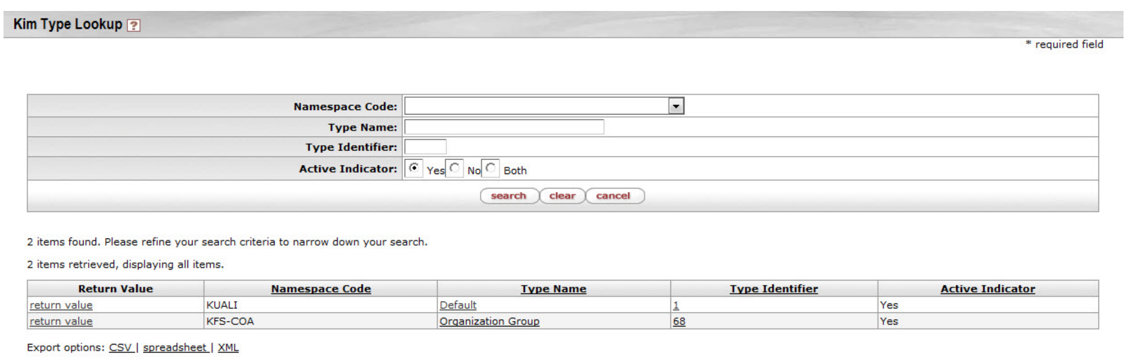


This lookup is used whenever you create a new group or role. The search definitions are explained below.

KIM Type Lookup definition

Title	Description
Namespace Code	Optional. Select the code identifying the application and module this KIM type pertains to.
Type Name	Optional. Enter the name identifying this KIM type.
Type Identifier	Optional. Enter the unique system-assigned identifying number for this KIM type.
Active Indicator	Required (defaults to 'Yes'). Change the default selection to view KIM types that are inactive or are both active and inactive.

The display of search results includes the same fields as the Lookup screen. To select the type you want to use for your new group, click the return value link for it.

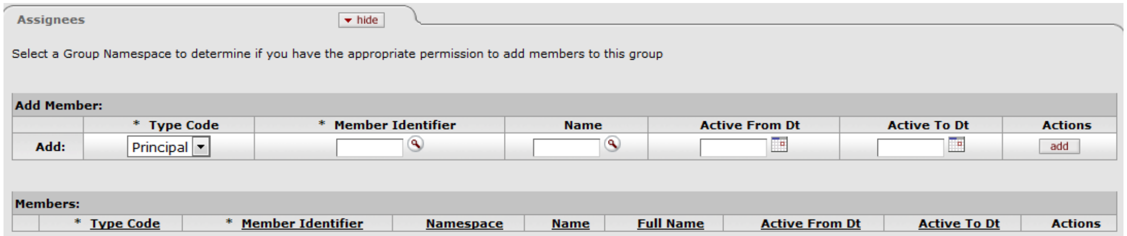


Definitions Tab

This tab contains any definitions specific to this group's type. For example, if a group has a type of Chart and Organization, this tab will record the Chart and Organization values that are specific to this group. In the example below a Chart Code and Organization Code are required for establishing groups of this type.

Assignees Tab

This tab contains the members who belong to this group. It can also be used to add new members or edit the values associated with existing members.



Assignees tab definition

Title	Description
Type Code	Required. Select the type of member you are adding to this group. Group members can be principals (as defined on the Person document), roles or other groups.
Member Identifier	Required. Enter the ID that identifies the member you are adding or use the lookup to search for and select a valid Member ID. The lookup directs you to the **Principal**, **Group** or **Role** lookup based on your Member Type Code selection.
Name	Display only. Displays the name of the member you've selected.
Active From Dt	Optional. To specify the earliest date on which this member is to be considered a valid member of this group, enter a From Date.
Active To Dt	Optional. To specify a date on which this member is no longer to be considered a valid member of this group, enter a To Date. **Note** Note that you cannot delete or inactivate group members. To remove a member from a group enter an Active To Date.
Actions	Click the **Add** button to add this member to the group.

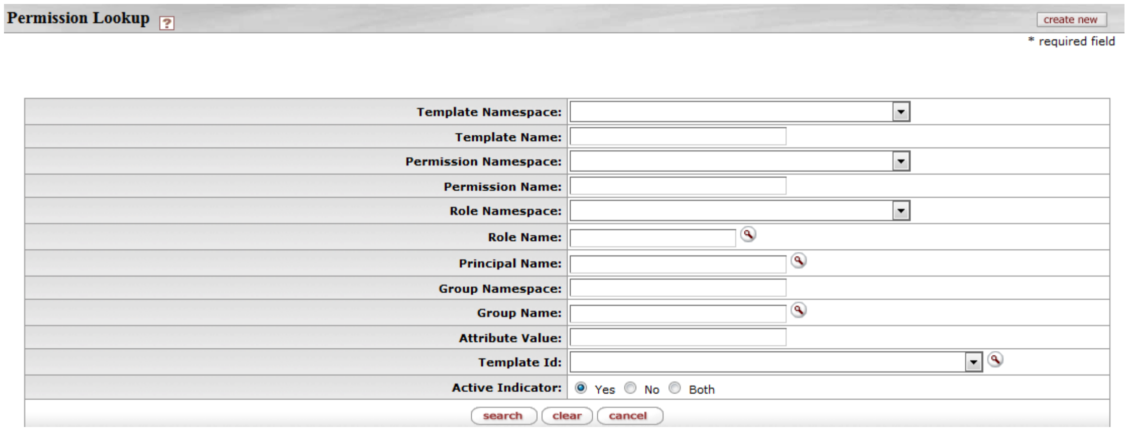
Permission

The Permission document allows you to create new permissions or edit existing ones. The Permission Lookup allows you to search for and view existing permissions. You can view summarized information about the permission detail values as well as the roles that are currently associated with this permission.

Only members of OLE-SYS Technical Administrator or OLE-SYS Manager role can create or modify Permission documents. These documents do not route for approval.

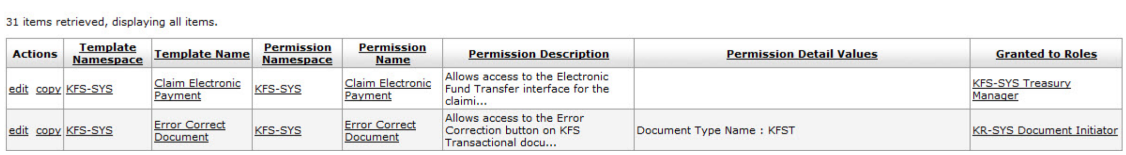
Note

Extreme caution should be exercised when modifying existing permissions or adding new ones. Even small changes can have application-wide consequences. Changes should be made only after sufficient testing with your local configuration.



Permission Lookup search criteria

Title	Description
Template Namespace	Optional. To search for a permission based on its template namespace (that is, the name of the application and module to which its template belongs), select the appropriate namespace.
Template Name	Optional. To search for a permission based on the name of the template it is based on, enter the appropriate template name.
Permission Namespace	Optional. To search for a permission based on its namespace, select the appropriate permission namespace.
Permission Name	Optional. To search for a permission by name, enter its name.
Role Namespace	To search for a permission based on the namespace of the role to which it is assigned, enter the appropriate role namespace.
Role Name	Optional. To search for a permission based on the role to which it is assigned, enter the appropriate role name.
Principal Name	Optional. To search for a permission based on the principals that currently have this permission through their association with a role, enter an appropriate principal name.
Group Namespace	Optional. To search for a permission based on the namespace of groups that have this permission through the group's association with a role, enter an appropriate group namespace.
Group Name	Optional. To search for a permission based on the name of a group that has this permission through its association with a role, enter an appropriate group name.
Attribute Value	Optional. A specific permission detail value associated with a permission
Template ID	Numerical value of the template namespace


31 items retrieved, displaying all items.

Actions	Template Namespace	Template Name	Permission Namespace	Permission Name	Permission Description	Permission Detail Values	Granted to Roles
edit copy	KFS-SYS	Claim Electronic Payment	KFS-SYS	Claim Electronic Payment	Allows access to the Electronic Fund Transfer interface for the claimi...		KFS-SYS Treasury Manager
edit copy	KFS-SYS	Error Correct Document	KFS-SYS	Error Correct Document	Allows access to the Error Correction button on KFS Transactional docu...	Document Type Name : KFST	KR-SYS Document Initiator

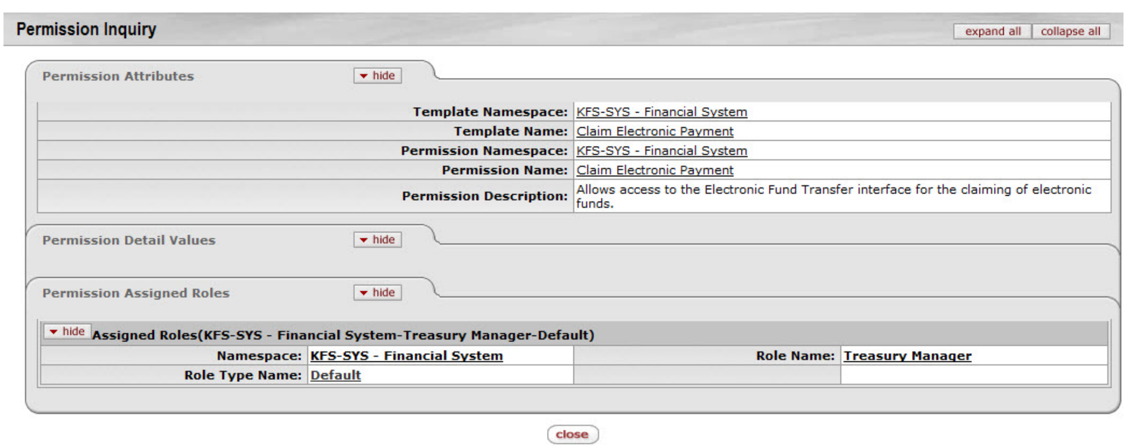
The Permission results display contains the fields described in the table below.

Permission Lookup results fields

Title	Description
Actions	Actions allow selection of edit or copy for each permission displayed.
Template Namespace	The code identifying the application and module the template pertains to. Because templates tend to be general categories, they are often associated with system-level namespaces.

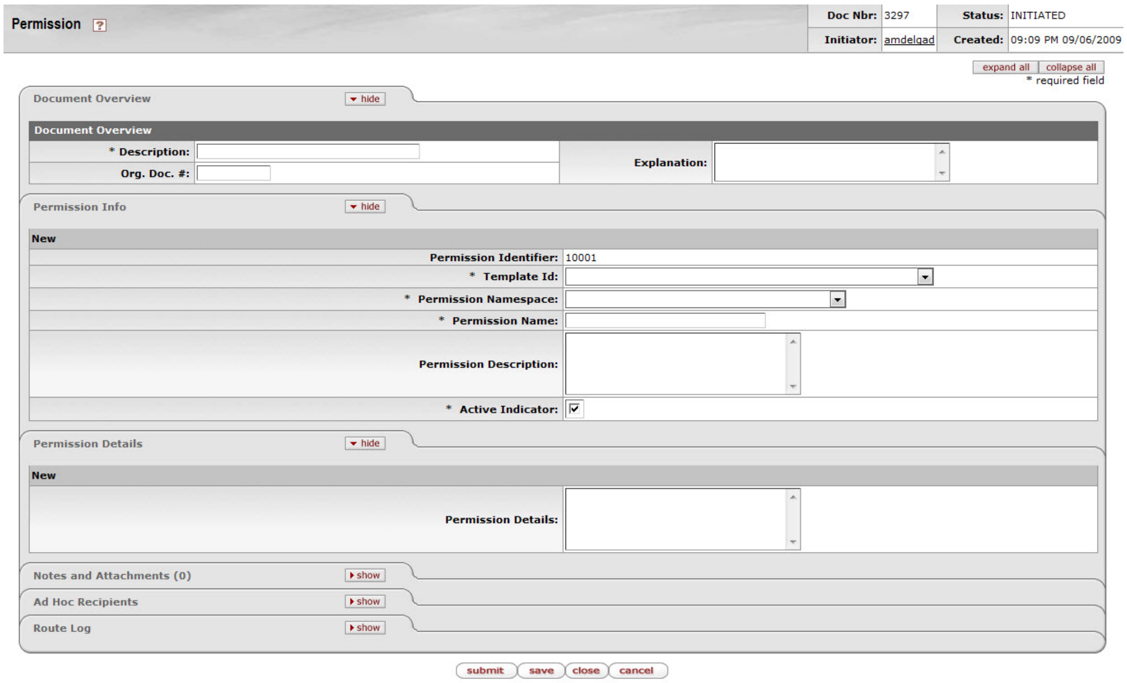
Template Name	The template the permission is based on. A template usually defines, in a broad sense, what the permission controls. Similar types of permissions share the same template.
Permission Namespace	The code designating the application and module this permission is associated with.
Permission Name	The descriptive name for this permission. In most cases this will match the Template Name.
Permission Description	Display only. Detailed information that describes the permission and its purpose.
Permission Detail Values	Display only. Detailed information that, in combination with the permission name, defines the permission's function. For example, if the permission name is 'Initiate Document,' the Permission Detail Values field indicates the specific type of document the initiate permission pertains to. Permission detail values can include many different types of data. Some common types are defined below. documentTypeName: The name of the document type associated with this permission. routeNodeName: The point in a document's workflow routing at which this permission becomes relevant. routeStatusCode: The routing status that a document must be in for this permission to apply. propertyName: Often, a field or document element that the permission pertains to.
Granted to Roles	Lists the namespace and name of roles that have this permission. Click on the linked name to view the Role inquiry.

To view an Inquiry screen for a permission, select the Permission Name of the appropriate row in the search results. The Inquiry screen contains the same information as the Search Results in a slightly different format.



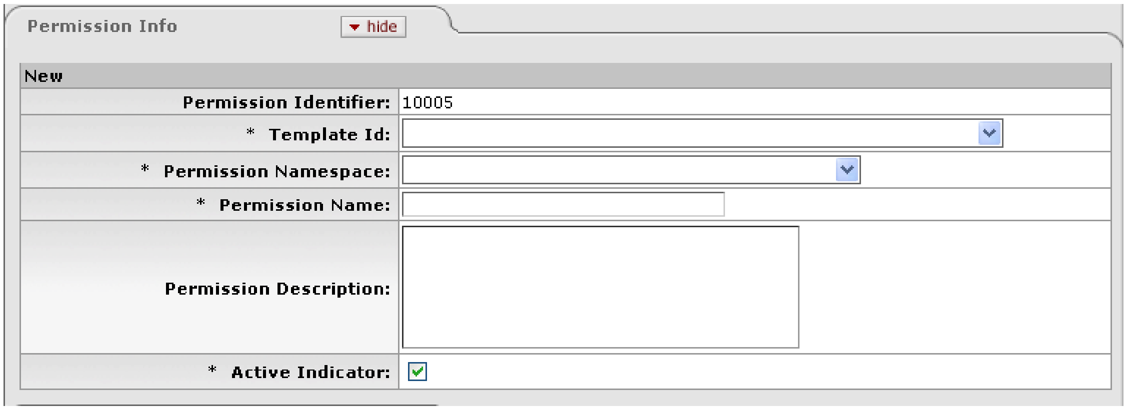
Document Layout

The Permission document includes **Document Overview**, **Permission Info**, and **Permission Details** tabs.



Permission Info Tab

This tab identifies the permissions with a unique system-assigned ID number, a template, namespace, name and description.



Permission Info tab definition

Title	Description
Permission Identifier	Display only. The unique, system-assigned ID number that identifies this permission.
Template ID	Required. Select the Template this permission is associated with. Templates identify broad permission types.
Permission Namespace	Required. An indicator that associates the permission with a particular application and module.
Permission Name	Required. A text name identifying this permission.
Permission Description	Optional. Enter a text description of what this permission does.
Active Indicator	Required (defaults to 'Yes'). Change the default selection if you wish this permission to be inactive. Inactive permissions will be disregarded by KIM when doing permission checks.

Permission Details Tab

This tab identifies the permission values that KIM needs to make this permission function. These values vary greatly depending on the type of permission being created. It is highly recommended that users view similar permissions (those with the same Template ID) and discuss Permission Details with technical resources to ensure values are entered correctly.

Permission Details tab definition

Title	Description
Permission Details	Optional (though most permissions require some details to be functional). Enter the permission details specific to this permission. Details should be entered as the name of the property followed by an '=' followed by the value of the property. When entering multiple details they should be separated by a hard return in the text box, such as: componentName=IdentityManagementPersonDocument

Person

The Person document allows you to identify each user to KIM (and, by extension, to OLE). Each Person document includes data about a user's relationship with your institution as well as the roles and groups to which this person belongs.

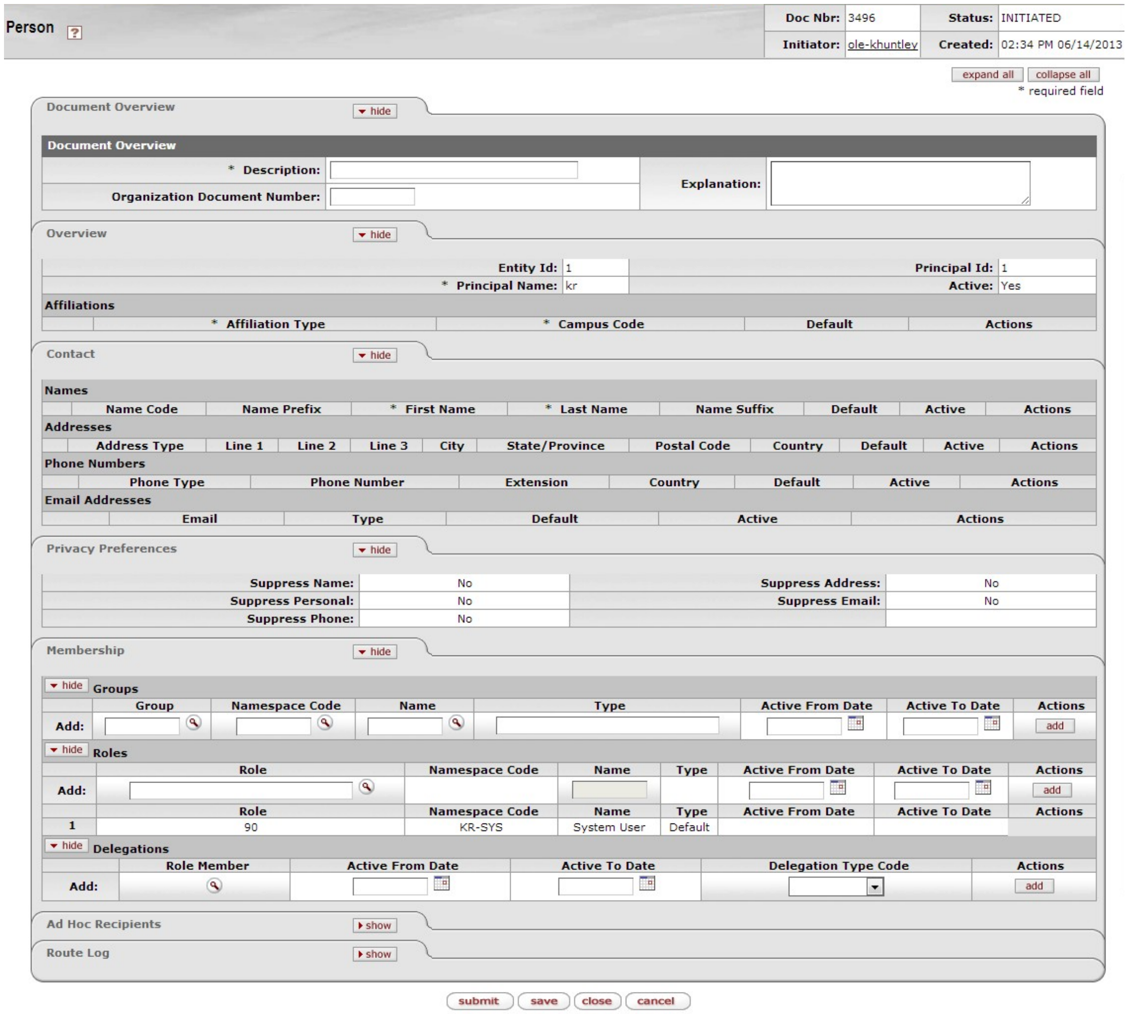
In KIM a person is a unique combination of an 'entity ID' and a 'principal ID.' The entity ID represents a person with a unique number, and the document associates the entity ID with the user's principal ID number and principal name (often referred to as a user name or user ID). When searching for or working with users in KIM, you usually reference either the principal ID or the principal name. A single entity ID can have multiple principals associated with it, but the base OLE implementation of KIM assumes that each entity ID has only a single principal.

Note

Note that initiation of the Person document is restricted to members of the KR-SYS Technical Administrator or OLE-SYS Manager role.

Document Layout

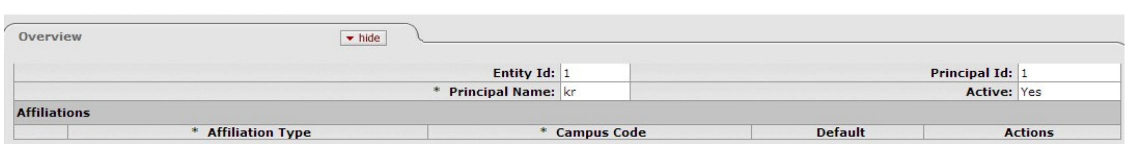
The Person document includes **Overview**, **Contact**, **Privacy Preferences**, and **Membership** tabs.



Overview Tab

The **Overview** tab identifies the person as a unique combination of entity and principal ID. It also contains information about how this person is affiliated with your institution. Two types of affiliations—staff and faculty—contain additional data elements to further define a person's relationship with your institution.

The instructions below assume that you are manually completing this information. Many institutions may want to either have this data fed from an existing person database or simply override this information with existing person data.



Overview Section

The first section in the **Overview** tab is the **Overview** section.

Overview section Definitions

Title	Description

Entity Id	Display only. The unique ID number identifying this person in your database. An individual may have multiple principal IDs but only one entity ID. The base OLE implementation assumes that each user will have only one entity ID and one principal ID. The system completes this entry automatically when you save or submit the document.
Principal ID	Display only. The unique ID number identifying this principal. Whereas Entity ID represents a unique person, principal represents a set of login information for that person. When selecting a person, you ordinarily reference his or her principal ID. The system completes this entry automatically when you save or submit the document.
Principal Name	Required. Enter the user name by which this principal is to be identified.
Principal Password	Optional. Enter the password for this principal ID.
Active	Check the box to indicate that this principal ID is active. Uncheck the box to indicate that this principal ID is inactive.

Use the **Affiliations** section of the **Overview** tab to add affiliations for this principal ID. Depending on the affiliation type added, you may need to complete additional fields.

Affiliations section definition

Title	Description
Affiliation Type	Optional. Select the type of affiliation from the list. Options include: Affiliate: An affiliation for users in your system that are neither employees nor students. Faculty: A faculty employee. Staff: A non-faculty employee. Student: A non-employee identified as a student of your institution. **Note** Affiliation types of Faculty and Staff require additional information (see below).
Campus Code	Required. Select the campus code associated with this affiliation.
Default	Check the box to indicate that this affiliation is this principal's default association with your institution. Each principal must have at least one default affiliation.
Actions	Click the **Add** button to add the affiliation.

If you have selected an Affiliation of 'Faculty' or 'Staff,' the system displays additional fields to collect employment information.

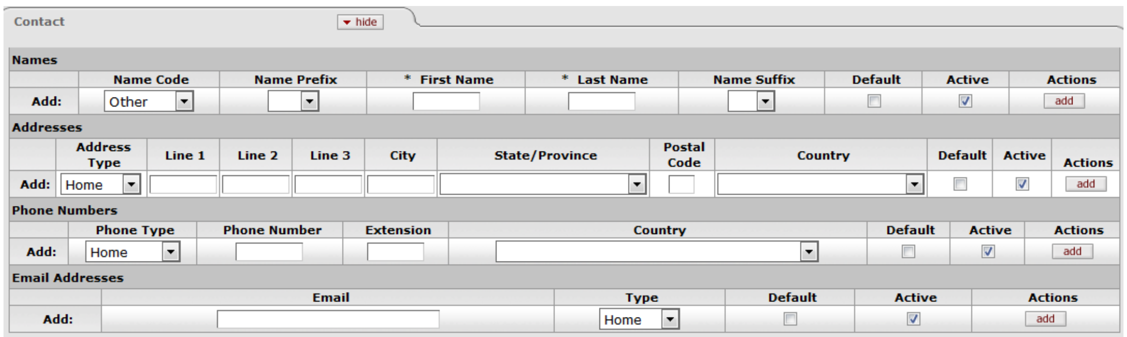
Employment Information fields definition

Title	Description
Employment ID	Optional. Enter the Employment ID number associated with this faculty or staff affiliation. Ordinarily this entry is the ID number identifying this principal in your HR system.
Primary	Check the box to indicate that this faculty or staff affiliation represents the principal's primary job with your institution. Each principal with a faculty or staff affiliation must have exactly one affiliation marked as 'primary.
Employee Status	Required. Select a value to identify the current status of this faculty or staff affiliation. Options include: Active, Deceased, On Non-Pay Leave Status, Not Yet Processed, Processing, Retired, Terminated

Employee Type	Required. Select a value to indicate the type of employment for this affiliation. Options include Non-Professional, Other, and Professional
Base Salary Amount	Required. Enter the base salary yearly amount earned for this faculty or staff affiliation.
Primary Department Code	Optional. Enter the code for the department associated with this faculty or staff affiliation. OLE-SYS User role parses this field to determine the default chart and organization for a user if it is formatted as 'Chart-Organization Code' such as BL-PSY or BA-PARK.
Actions	Click the**Add** button to add this row of employment information.

Contact Tab

The **Contact** tab records the names, addresses, phone numbers and email addresses associated with this Person record. Any Person record can store multiple records for contact information of each type (name, address, phone number, and email address), with one value of each type identified as the default value for the Person record.



Names Section

Names section definition

Title	Description
Name Code	Optional. Select the type of name to be added in this row. Options include: Other, Preferred, Primary
Name Prefix	Optional. Select the appropriate title for the name being added in this row. Options include: Ms, Mrs, Mr, Dr
First Name	Optional. Enter the first name for this record.
Last Name	Optional. Enter the last name for this record.
Name Suffix	Optional. Select a suffix for this name record. Options include: Jr, Sr, Mr, Md
Default	Check this box to indicate that this Name record is to be used as the default for this person. Each Person record must have exactly one Name record identified as the default.
Active	Check the box to indicate that this Name record is active. Uncheck the box to indicate that this record should be considered inactive.
Actions	Click the **Add** button to add this Name record.

Addresses Section

Addresses section definition

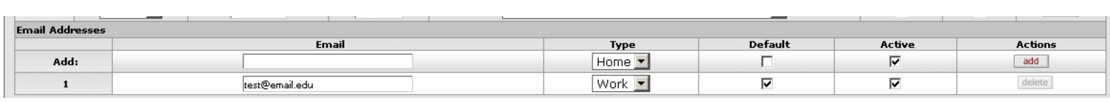
Title	Description
Address Type	Optional. Select the type of address being added on this row. Options include: Home, Other, Work
Line 1-3	Optional. Use lines 1, 2 and 3 to enter the street address for this row.
City	Optional. Enter the city associated with this address.
State/Province	Optional. Select the state or province associated with this address from the list.
Postal Code	Optional. Enter the postal code associated with this address.
Country	Optional. Select the country associated with this address.
Default	Check this box to indicate this address record should be used as the default. A Person record can have no more than one default Address record.
Active	Check this box to indicate that this Address record is active. Uncheck the box to indicate that this record is inactive.
Actions	Click the **Add** button to add this Address record.

Phone Numbers Section

Phone Numbers section definition

Title	Description
Phone Type	Optional. Select the type of phone number being added on this row. Options include: Home Mobile Other Work
Phone Number	Optional. Enter the area code and phone number.
Extension	Optional. Enter the appropriate extension.
Country	Optional. Select the country associated with this Phone Number record.
Default	Check this box to indicate that this Phone Number record should be used as the default. A Person record can have no more than one default Phone Number record.
Active	Check this box to indicate that this Phone Number record is active. Uncheck the box to indicate that this record is inactive.
Actions	Click the **Add** button to add this Phone Number record.

Email Addresses Section



Email Address section definition

Title	Description
Email	Optional. Enter the email address for this record.

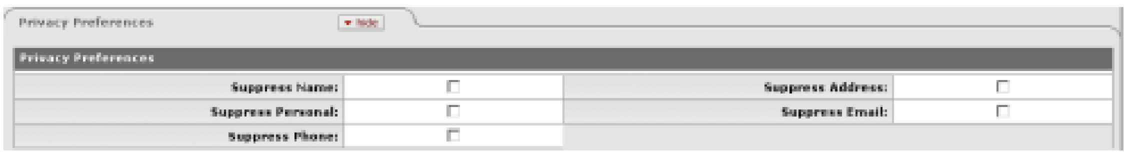
Type	Optional. Select the type of email address being added on this row. Options include: Home, Other, Work
Default	Check this box to indicate that this Email Address record should be used as the default. A Person record can have no more than one default Email Address record.
Active	Check this box to indicate that this Email Address record is active. Uncheck the box to indicate that this record is inactive.
Actions	Click the **Add** button to add this Email Address record.

Privacy Preferences Tab

Note

Note that no role in the base data configuration can modify this privacy preferences information. If you wish this capability to be available via the user interface, you must assign the 'Override Entity Privacy Preferences' permission to a role.

The **Privacy Preferences** tab allows you to suppress the display of fields on the Contact Tab.

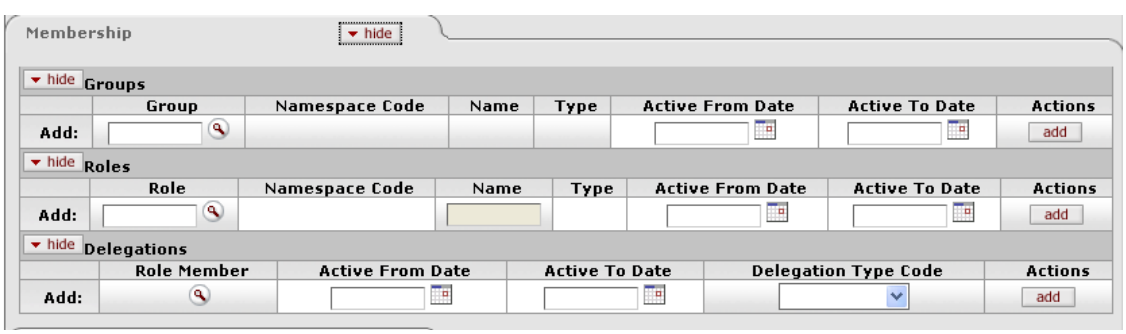


Privacy Preferences tab definition

Title	Description
Suppress Name	Optional. Check this box to specify that the system is not to display this person's names.
Suppress Personal	Optional. Do not display this person's personal data. This selection currently performs no function in OLE.
Suppress Phone	Optional. Check this box to specify that the system is not to display this person's phone numbers.
Suppress Address	Optional. Check this box to specify that the system is not to display this person's addresses.
Suppress Email	Optional. Check this box to specify that the system is not to display this person's email addresses.

Membership Tab

The **Membership Tab** allows you to associate a person with groups and roles and, by extension, with KIM permissions and responsibilities. *Assigning a person to a role is the most direct way to give a user KIM permissions and responsibilities.*



The tab is divided into three sections, one for managing assignments to **Groups**, another for **Roles**, and a third for **Delegations**.

Groups Section

Groups section definition

Title	Description
Group	Optional. Enter the name of the KIM group you want to assign this person to. You can also use the Group lookup to search for and select a valid value.
Namespace Code	Display only. After you select a group to add this person to, the namespace code associated with the selected group is displayed.
Name	Display only. After you select a group to add this person to, the name of that group is displayed.
Type	Display only. After you select a group to add this person to, the type associated with the selected group is displayed.
Active From Date	Optional. If this user's assignment to this group is to be effective as of a certain date, enter that date here.
Active To Date	Optional. If this user's assignment to this group is to terminate as of a certain date, enter that date here. **Note** There is no way to delete a person's assignment to a group. To remove a person from a group, use this field to specify a date in the past.
Actions	Click the **Add** button to add this group assignment.

Roles Section

Roles section definition

Title	Description
Role	Optional. Use the Name lookup to search for and select the role you want to assign this person to.
Namespace Code	Display only. After you select a role to assign to this Person record, the system displays the namespace code associated with that role.
Name	Display only. After you select a role to assign to this Person record, the system displays the name associated with that role.
Type	Display only. After you select a role to assign to this Person record, the system displays the role type associated with the selected role here.
Active From Date	Optional. If this user's assignment to this role is to be effective as of a certain date, enter that date here.
Active To Date	Optional. If this user's assignment to this role is to terminate as of a certain date, enter that date here. **Note** Note that there is no way to delete a person's assignment to a role. To remove a person from a role, use this field to specify a date in the past.
Actions	Click the Add button to add this role data.

Note

When assigning some roles, you may need to supply additional qualifying values that further define this person's assignment. For more information about role qualifiers, see Role.

Delegations Section

Delegations allow you to set a user as a primary or secondary delegate for a current member of a role. The delegate has the same permissions as the role member and is able to act on action requests generated for the role member by KIM.

Delegations section definition

Title	Description
Role Member	Optional. Use the Role Member lookup to search for and select the role and role member you wish to add a delegation for.
Active From Date	Optional. If this delegation is to be effective as of a certain date, enter that date here.
Active To Date	Optional. If this delegation is to terminate as of a certain date, enter that date here. **Note** Note that there is no way to delete a person's delegation. To remove a person from a role, use this field to specify a date in the past.
Delegation Type Code	Optional. This defines how the delegate will be able to access workflow action requests generated to the delegating role member. Options are 'Secondary' (the user must use the secondary delegate action list filter to view action requests) and 'Primary' (action requests will route directly to the delegate's action list).
Actions	Click the **Add** button to add this delegation data.

Process Overview

1. Enter the required fields and any additional information to the **Overview** and **Contact** tabs.
2. Add roles as desired on the **Membership** tab.
3. Include additional information to the Person document.
4. Save or submit the Person document.

Note

In OLE 1.5 after clicking **Submit** and receiving the system response "Document was successfully submitted", if you click **Close** OLE will ask "Would you like to save this document before you close it?" Select **No**. If you select Yes, the system will give you a stack trace error. Your changes will be saved in the system.

Additionally, after clicking **Save** and receiving the system response "Document was successfully submitted", if you click **Close** OLE will ask "Would you like to save this document before you close it?" Select **No**. Your changes will be saved in the system.

See OLE-5972 for additional details.

Business Rules

- A person must have at least one affiliation.
- Each faculty or staff affiliation must have at least one Employment Information record associated with it.

- If a person has any faculty or staff affiliations then one Employment Information record must be marked as 'primary.
- Each person must have a default Name record in the Contacts section.
- Each affiliation must be associated with a campus.
- Each type of contact information can have only one record marked as the default.

Routing

Only members of OLE-SYS Manager or KR-SYS Technical Administrator roles can initiate Person documents. In OLE base data configuration, the KIM Person document does not route for approval.

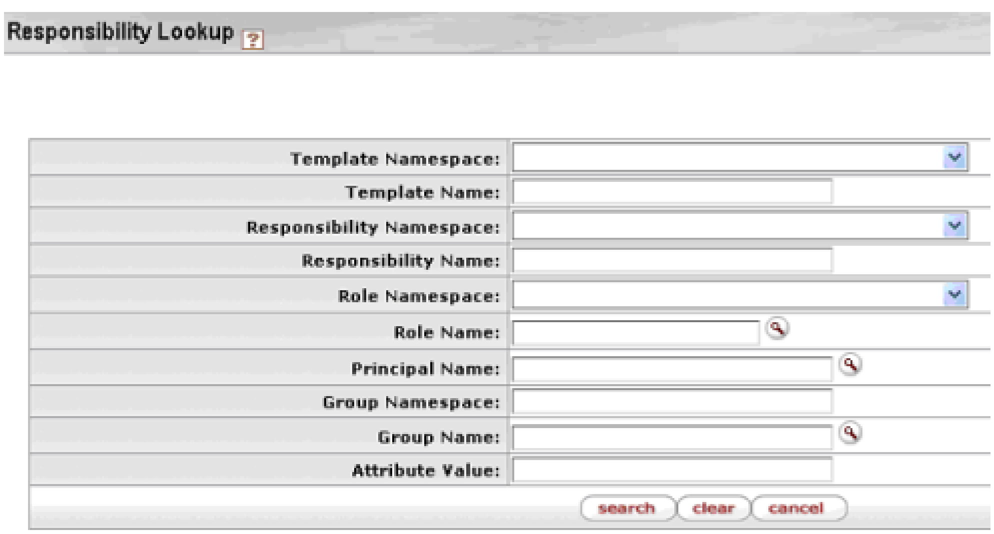
Responsibility

The Responsibility document allows you to create new responsibilities or edit existing ones. The Responsibility Lookup allows you to search for and view existing responsibilities. You can view summarized information about the responsibility detail values as well as the roles with which the responsibility is currently associated.

Only members of OLE-SYS Technical Administrator or OLE-SYS Manager role can create or modify a Responsibility document and it does not route for approval. Information about the Responsibility document follows detailed information about the Responsibility Lookup below.

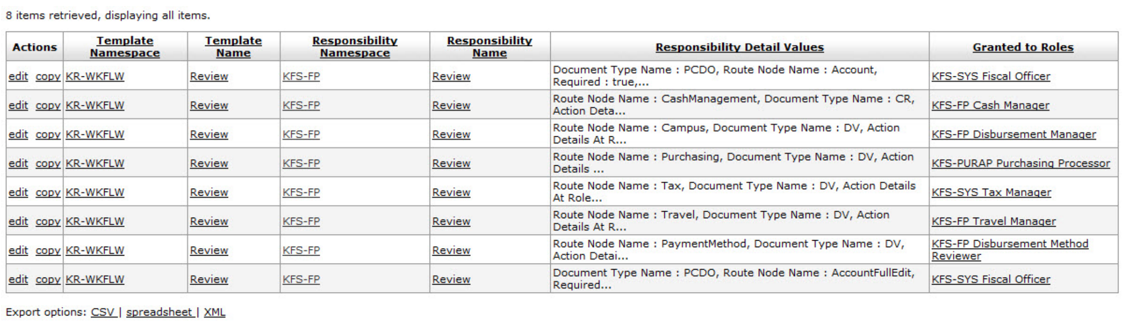
Note

Caution should be exercised when modifying existing responsibilities or adding new ones. Relatively minor changes can result in disruptions to the workflow of documents if made in error. Changes should be made only after sufficient testing with your local configuration.



Responsibility Lookup search criteria

Title	Description
Template Namespace	Optional. To search for a responsibility based on its template namespace (that is, the name of the application and module to which its responsibility template belongs), select the appropriate namespace.
Template Name	Optional. To search for a responsibility based on the name of the template it is based on, enter the appropriate template name.
Responsibility Namespace	Optional. To search for a responsibility based on its namespace, select the appropriate responsibility namespace.
Responsibility Name	Optional. To search for a responsibility by name, enter its name.
Role Namespace	To search for a responsibility based on the namespace of the role to which it is assigned, enter the appropriate role namespace.
Role Name	Optional. To search for a responsibility based on the role to which it is assigned, enter the appropriate role name.
Principal Name	Optional. To search for a responsibility based on the principals that currently have this responsibility through their association with a role, enter an appropriate principal name.
Group Namespace	Optional. To search for a responsibility based on the namespace of groups that have this responsibility through the group's association with a role, enter an appropriate group namespace.
Group Name	Optional. To search for a responsibility based on the name of a group that has this responsibility through its association with a role, enter an appropriate group name.
Attribute Value	Optional. A specific responsibility detail value associated with a responsibility.



8 items retrieved, displaying all items.

Actions	Template Namespace	Template Name	Responsibility Namespace	Responsibility Name	Responsibility Detail Values	Granted to Roles
edit copy	KR-WKFLW	Review	KFS-FP	Review	Document Type Name : PCDO, Route Node Name : Account, Required : true,...	KFS-SYS Fiscal Officer
edit copy	KR-WKFLW	Review	KFS-FP	Review	Route Node Name : CashManagement, Document Type Name : CR, Action Deta...	KFS-FP Cash Manager
edit copy	KR-WKFLW	Review	KFS-FP	Review	Route Node Name : Campus, Document Type Name : DV, Action Details At R...	KFS-FP Disbursement Manager
edit copy	KR-WKFLW	Review	KFS-FP	Review	Route Node Name : Purchasing, Document Type Name : DV, Action Details ...	KFS-PURAP Purchasing Processor
edit copy	KR-WKFLW	Review	KFS-FP	Review	Route Node Name : Tax, Document Type Name : DV, Action Details At Role...	KFS-SYS Tax Manager
edit copy	KR-WKFLW	Review	KFS-FP	Review	Route Node Name : Travel, Document Type Name : DV, Action Details At R...	KFS-FP Travel Manager
edit copy	KR-WKFLW	Review	KFS-FP	Review	Route Node Name : PaymentMethod, Document Type Name : DV, Action Detai...	KFS-FP Disbursement Method Reviewer
edit copy	KR-WKFLW	Review	KFS-FP	Review	Document Type Name : PCDO, Route Node Name : AccountFullEdit, Required...	KFS-SYS Fiscal Officer

Export options: CSV | spreadsheet | XML

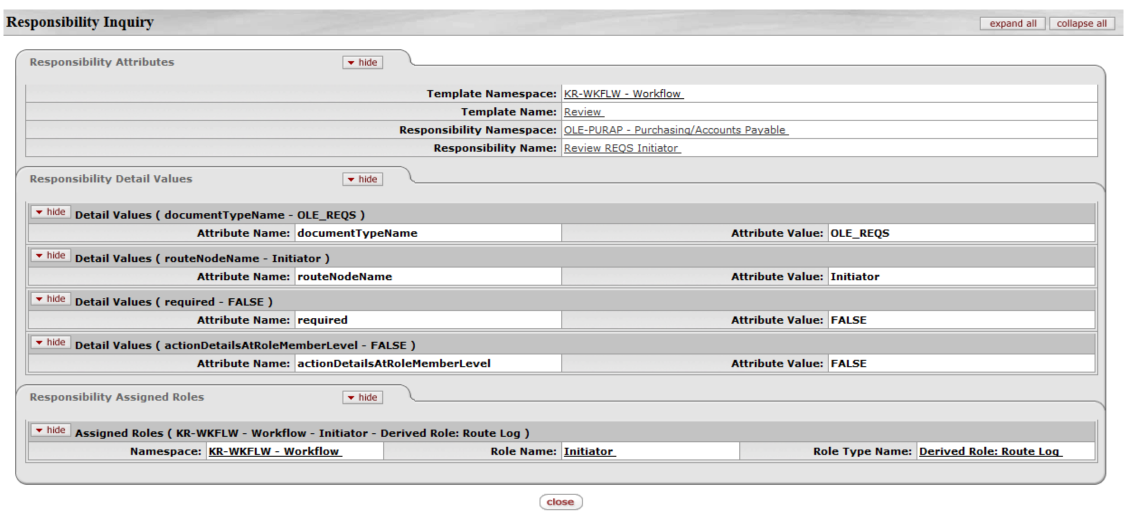
The Responsibility results display contains the fields described in the table below.

Responsibility Lookup results fields

Title	Description
Actions	Actions allow selection of edit or copy for each responsibility displayed.
Template Namespace	The code identifying the application and module the template pertains to. Because responsibilities pertain to workflow, most responsibility templates are associated with the KR-WKFLW (Kuali Rice-Workflow) namespace.
Template Name	The template the responsibility is based on. A template usually defines, in a broad sense, what the responsibility is. Since responsibilities normally are normally associated with action requests for user review, most responsibilities have a template name of 'Review.
Responsibility Namespace	The code designating the application and module this responsibility is associated with. This code usually corresponds to the namespace of the document type for which the responsibility generates action requests.
Responsibility Name	The name of this responsibility. In most cases the responsibility name will be the same as the associated template name ('Review'). Like permission names, responsibility names are not unique. Most OLE responsibilities have a name of 'Review.
Responsibility Detail Values	Display only. Detailed information that defines what document this responsibility generates action requests for, when the requests are generated and how they are handled by workflow.

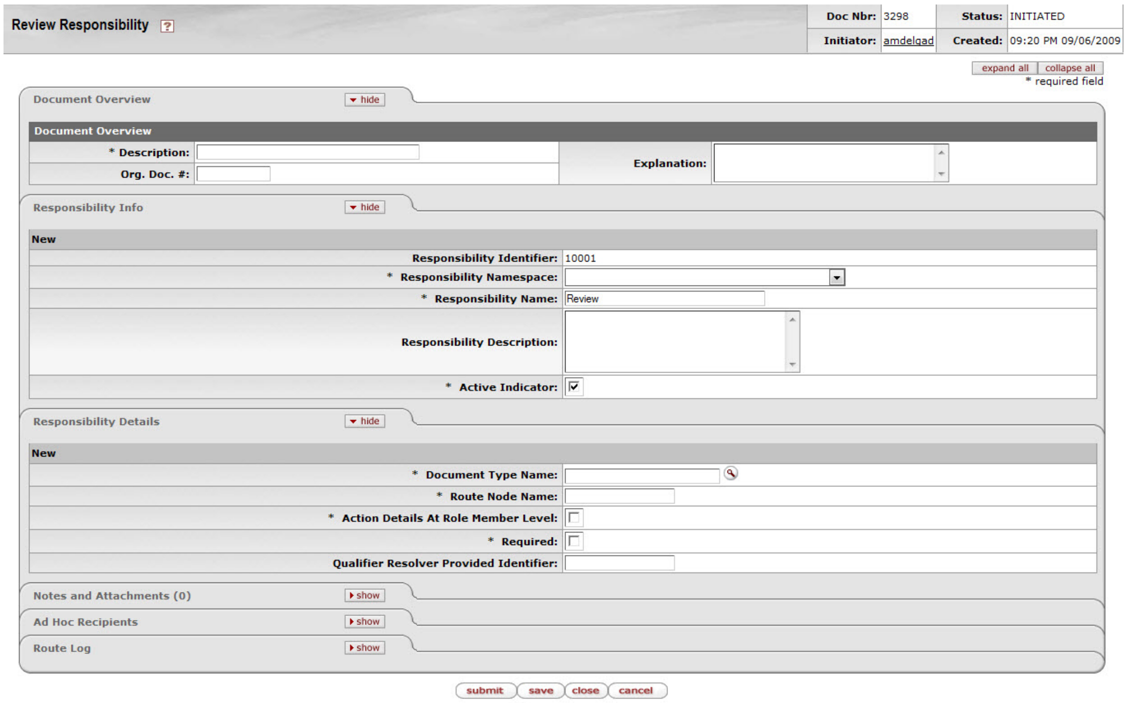
	Unlike permissions, which sometimes have different detail values, responsibility detail values generally contain the elements defined below. routeNodeName: The point in a document's workflow routing at which this responsibility generates requests. documentTypeName: The name of the document type for which this responsibility generates action requests. This value may also be a parent document type, which indicates that this responsibility applies to all child documents that contain the appropriate route node. actionDetailsAtRoleMemberLevel: A True or False indicator that defines where the system collects details of this workflow action request. If the value is 'True,' the system collects action details when members are assigned to the role. If the value is 'False,' the system collects action details when this responsibility is assigned to a role. required: A True or False value that indicates whether the system is required to generate an action request for this document type. If the value is 'True' and the document generates no requests associated with this responsibility, then the document will go into exception status. If the value is 'False' and the responsibility generates no action requests, then the document continues to route as normal.
Granted to Roles	Lists the namespace and name of roles that have this responsibility. Click on the linked name to view the Role Inquiry.

To view an Inquiry screen for a responsibility, select the **Responsibility Name** of the appropriate row in the search results. The Inquiry contains the same information displayed in the search results in a slightly different format.



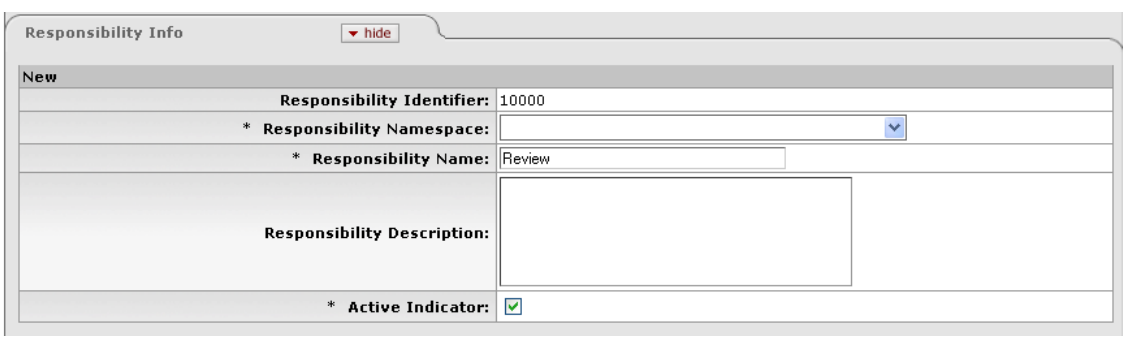
Document Layout

The Responsibility document includes **Document Overview**, **Responsibility Info**, and **Responsibility Details** tabs.



Responsibility Info Tab

This tab identifies the responsibility with a unique system-assigned ID number, a namespace, name and description.

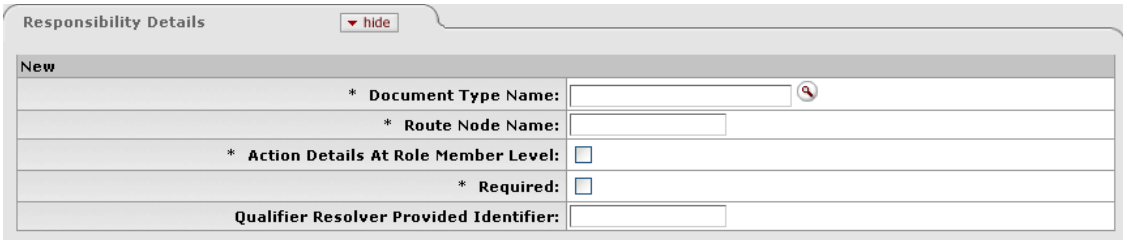


Responsibility Info tab definition

Title	Description
Responsibility Identifier	Display only. The unique, system-assigned ID number that identifies this responsibility.
Responsibility Namespace	Required. An indicator that associates the responsibility with a particular application and module.
Responsibility Name	Required (defaults to 'Review'). A text name identifying this responsibility. Note that this is the only valid value for this document. You cannot use the Responsibility document to establish or modify Responsibilities with the name 'Resolve Exception' -these require a technical resource to modify.
Responsibility Description	Optional. Enter a text description of what this responsibility does.
Active Indicator	Required (defaults to 'Yes'). Change the default selection if you wish this responsibility to be inactive. Inactive responsibilities will be disregarded by Workflow.

Responsibility Details Tab

This tab identifies the document type and route node associated with this responsibility. It also defines other responsibility information such as whether or not the action details reside at the role member level.



Responsibility Details tab definition

Title	Description
Document Type Name	Required. Enter the name of the document type this responsibility is associated with or use the **Document Type Lookup**  to search for and select a value.
Route Node Name	Required. The name of the route node at which this responsibility should be invoked.
Action Details at Role Member Level	Required (defaults to False). Check this box if you want role members associated with this responsibility to be able to define the type of workflow action they will need to take in order to fulfill the action request it generates.
Required	Required (defaults to False). Check this box if you wish documents of this type to go into Exception status if this responsibility does not generate at least one action request.
Qualifier Resolver Provided Identifier	Optional. In most cases this field should be blank. It can be used as an additional identifier KIM will use to choose the correct responsibility information for a given doc type. The document type must pass the provided identifier to KIM. This is only used in OLE based data for the routing of group documents. The group type ID is populated here and determines how the document routes (Chart and Organization type groups do organization review routing and default group types do not).

Role

The Role document allows you to create a new KIM role and edit an existing role. Each role aggregates a specific set of permissions and responsibilities and allows you to assign members to the role. OLE contains many existing roles that your institution may want to use as is, but you may also change existing roles and add new ones by using the Role document.

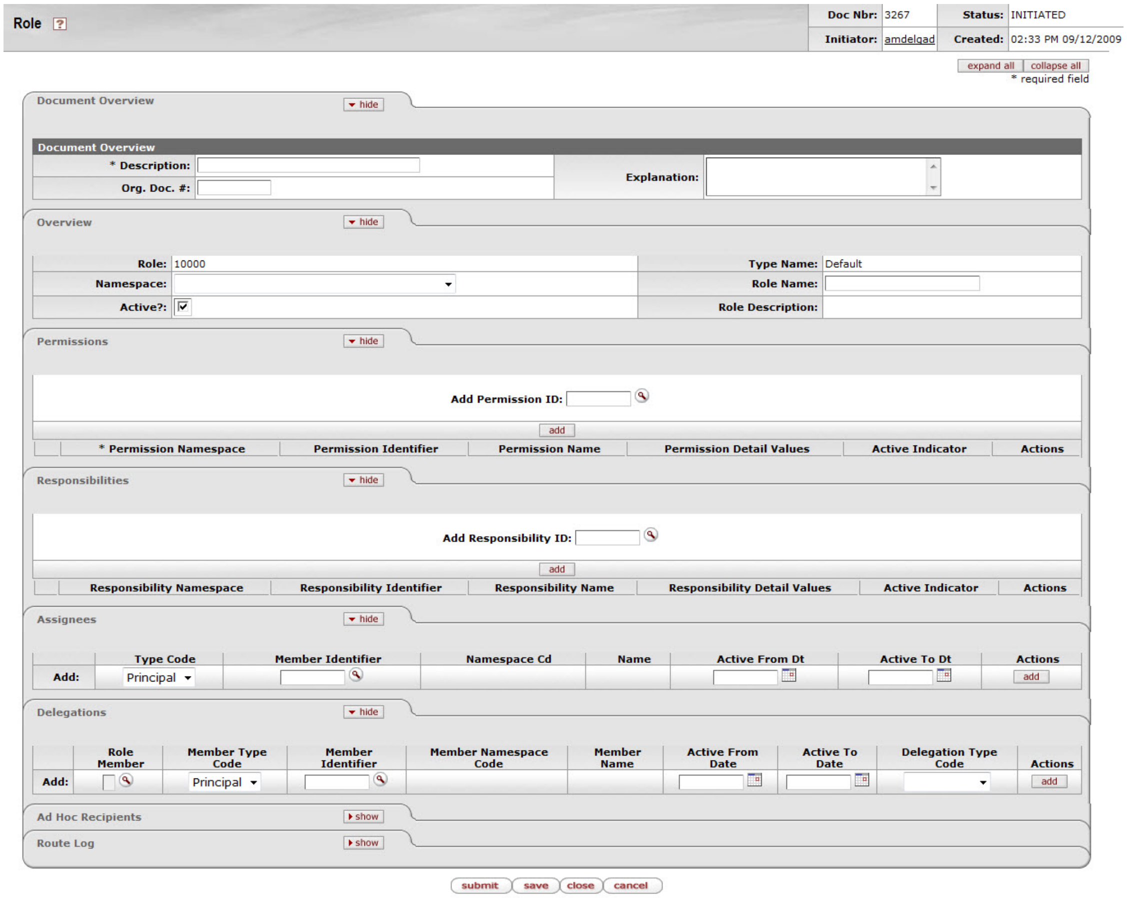
The purpose of each role is defined by its associated permissions and responsibilities. Roles are classified by types that generally indicate the type of permissions and responsibilities with which they can be associated.

Note

The process of creating a new type requires technical assistance. Consequently, KIM does not provide an interface for creating role types.

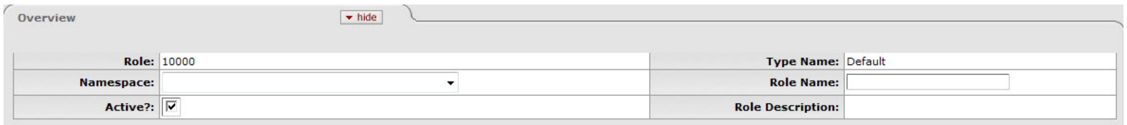
Document Layout

The Role document includes **Document Overview**, **Overview, Permissions**, **Responsibilities**, and **Assignees** tabs.



Overview Tab

This tab identifies the role with a unique system-assigned ID number, a namespace and a name. Each role also has a type which tends to match the types of permissions and responsibilities associated with it.



Overview tab definition

Title	Description
Role	Display only. The unique, system-assigned ID number that identifies this role.
Type Name	Display only. Because the role type normally reflects the type of qualifiers this role will need to collect when members are added, this name usually identifies the general types of permissions and responsibilities associated with it.

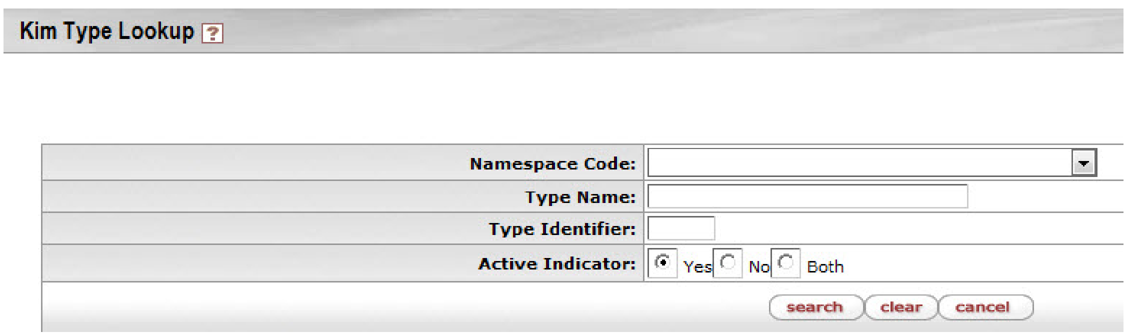
	Note When creating a new role, you must select its type before the system will generate the document. See Creating New Roles.
Role Namespace	Required. An indicator that associates the role with a particular application and module.
Role Name	Required. The common descriptive name by which this role is known.
Active	Check this box to indicate that this role is active and is, therefore, to be included by KIM when evaluating permissions and responsibilities. Uncheck the box to indicate that this role is inactive.

Creating New Roles

When you click the **Create New** button, the system displays the KIM Type Lookup. You must search for and select an existing Type in order for the system to generate a new Role document.

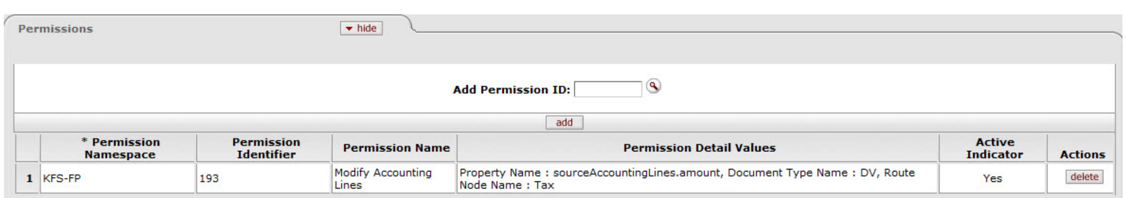
Note

Note that while the KIM Type Lookup is used when creating new groups and roles, not all KIM types are valid for both. When using this Lookup, you may receive different results depending on the KIM types that are valid for the entity you are working with.



Permissions Tab

This tab identifies the permissions associated with this role. Permissions authorize specific actions in the system with which they are associated. A role can have any number of permissions (including no permissions) associated with it.



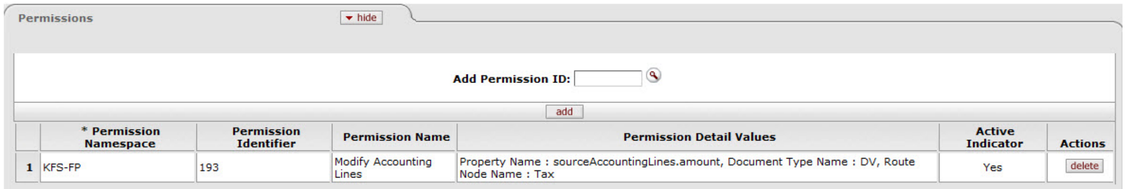
Permissions tab definition

Title	Description
Add Permission ID	To add a permission to this role, enter the appropriate permission ID or search for and select a value using the **Permission** lookup .
Add	Click the **Add** button to add the selected permission to this Role document.

After you add a permission to the document, the system displays additional information about the permission.

Note

Permissions cannot be edited via the Role document. Use the Permission document to perform this function.



Permissions tab definition, continued

Title	Description
Permission Namespace	Display only. The Namespace identifies the application and module associated with this permission.
Permission Identifier	Display only. The unique system-assigned ID number for this permission.
Permission Name	Display only. The descriptive name of this permission. This often identifies, in general terms, what the permission authorizes.
Permission Detail Values	Display only. The document types, tabs and/or fields this permission authorizes. Not all permissions have detail values.
Active Indicator	Display only. Indicator showing whether this permission is active within the system or not.
Actions	Click the **Delete** button to remove this permission from the role. **Note** You may delete a permission only if it has not yet been saved to the database (i.e., you added it to this role but have not yet submitted the document).

Responsibilities Tab

This tab identifies the responsibilities associated with this role. Responsibilities define the workflow actions that will be requested of the role. A role can have any number of responsibilities (including none) associated with it.

Responsibilities tab definition

Title	Description
Add Responsibility ID	To add a responsibility to this role enter the responsibility ID or search for and select a value using the **Responsibility** lookup .
Add	Click the **Add** button to add the selected responsibility to this Role document.

After you add a responsibility to the document, the system displays additional information about this responsibility.

Note

Responsibilities cannot generally be edited via the Role document, but some responsibilities have associated definitions that you must define at the role level. For information about editing responsibilities, see Responsibility.

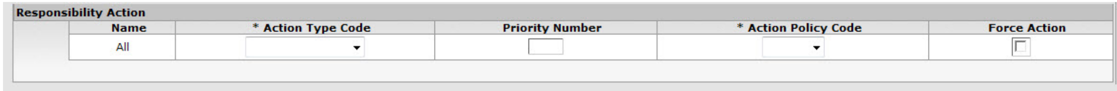
Responsibilities tab definition, continued

Title	Description
Responsibility Namespace	Display only. The Namespace identifies the application and module associated with this responsibility.
Responsibility Identifier	Display only. The unique system-assigned ID number identifying this responsibility.
Responsibility Name	Display only. The descriptive name of this responsibility. For most Responsibilities the name is 'Review.
Responsibility Detail Values	Display only. This identifies more specific information about the responsibility. Responsibility Detail Values are formatted in a standard way with the following definitions delimited by commas: Route Node: The workflow route level at which this responsibility is invoked. Document Type: The document type for which this responsibility generates workflow requests. Action Details at Role Member Level: A True or False indicator that defines where the details of this workflow action request are defined. If the value is 'True' then action details will be collected when Members are assigned to the role. If the value is 'False' then the action details must be collected when this responsibility is assigned to a role (see Assigning Action Detail Values.) Required: Indicates if the routing represented by this responsibility should be required. If this is set to True and the responsibility fails to generate an action request (perhaps because no one is assigned to the associated Role) then the document will go into Exception status. If this routing is optional this value will be False and the document will simply skip this responsibility if no requests are generated.
Active Indicator	Display only. Indicator showing whether this responsibility is active within the system or not.
Actions	Click the **Delete** button to remove this responsibility from this role. **Note** You can delete a responsibility only if it has not yet been saved to the database (i.e., you have added it to this role but have not yet submitted the document).

Assigning Action Detail Values

When adding a responsibility with an **Action Detail Values at Role Member Level** value of 'False,' you must complete additional fields in a Responsibility Action sub-section. The system displays this section immediately beneath the responsibility you've just added.

The fields in this sub-section define the type of action requests generated for and the general workflow behavior associated with this responsibility. Entries in these fields cause the system to generate the same type of action requests for all members of this role and handle actions by all members in the same way.

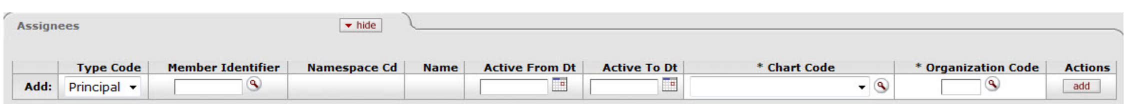


Responsibility Action subsection definition

Title	Description
Name	Display only. The namespace and name of the responsibility associated with these action details.
Action Type Code	Required. The type of action request that the system is to generate for this responsibility. Options include Approve, FYI and Acknowledge.
Priority Number	Optional. If multiple requests are generated at the route node specified on this responsibility, this value determines in the order in which the system will generate these requests. The system processes requests with lower priority numbers before processing requests with higher numbers. Requests with no number are treated as a priority of 1.
Action Policy Code	Required. This value determines what happens if multiple members of this role receive the same action request and one of them takes the action. This currently only applies in situations where a single action request is generated to multiple role members (i.e. the action details exist at the role level) or a role is assigned to another role and these nested role members receive an action request. For example, if a role with a responsibility with action details defined at the role level has three members assigned, all of these members receive the action request defined here; this code determines what the system does when one of them takes action on the document. A value of FIRST indicates that the first role member to take action on the document will automatically clear all the requests for this responsibility that may be in other role member's action lists. A value of ALL indicates that each role member must take individual action to clear his or her requests.
Force Action	Check the box to indicate that each user must take this action for this request even if the user has already previously taken action on this document. Leaving the box unchecked allows a request to be immediately fulfilled if the role member has previously taken action on this specific document.

Assignees Tab

This tab contains all members who belong to this role. You may also use the tab to add new members and edit the values associated with existing members.



Assignees tab definition

Title	Description
Type Code	Required. Role members can be principals (as defined on the Person document), groups or other roles. Select the type of member you want to add to this Role.
Member Identifier	Required. Enter the ID of the member you want to add or use the lookup to search for and select a valid value. The lookup directs you to the **Principal**, **Group** or **Role** lookup based on your Member Type Code selection.
Namespace Cd	Display only. Identifies the namespace code associated with this role member. Note that only groups and roles will display a namespace code.
Name	Display only. Identifies the name of the member being assigned to this role.
Active From Date	Optional. Allows you to qualify this member's association with this role by date. Entering a from date will define the earliest date on which this member is a valid member of this role.

Active To Date	Optional. Allows you to deactivate a member's association with a role on a specific date. The date you enter defines the date the user is no longer a member of this role. **Note** You cannot delete or inactivate role members. To remove a member from a role, specify an active to date.
Actions	Click the **Add** button to add this member to the role.

Note

Additional fields may be required, such as Chart Code or Organization Code, depending on the role type selected.

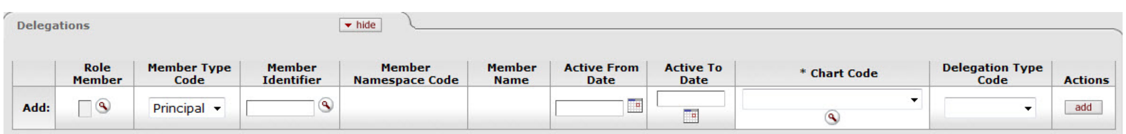
Note

Note that when assigning roles to other roles (nesting roles), qualifying values are not required. Some roles in OLE base data contain special logic to derive the required qualifiers from the nested role itself without qualifiers being specified. You may always specify qualifying values for a nested role and should do so unless you know the role being assigned contains logic to derive the qualifiers from the nested role. Roles without the proper qualifiers can cause problems throughout your OLE instance. Please consult with a OLE technical resource if you are unsure of whether or not to provide qualifying values when assigning a role to another role.

Delegations Tab

This tab identifies delegates associated with the role. Delegates are users that a member of this role has authorized to have the same permissions and take the same actions as the member is authorized to take.

The Assignees Tab dealing with Delegates is slightly different as detailed in the following table. Note that if the members of a role require qualifying values, the delegation requires these values as well. In most cases, delegates must have the same qualifiers as the role member they are associated with.



Delegations tab definition

Title	Description
Role Member	Required. Use the lookup to search for and return the member of this role you wish to create a delegate for.
Member Type Code	Required. Delegates may be principals (as defined on the Person document), groups or other roles. Select the type of delegate you want to add to this role.
Member Identifier	Required. Enter the ID that identifies the delegate you want to add or use the lookup to search for and select a valid value. Note that the lookup will direct you to the **Principal**, **Group** or **Role** lookup based on your Member Type Code selection.
Member Namespace Code	Display only. Identifies the namespace associated with the selected delegate. Note that only delegations to groups or roles will display a member namespace code.
Member Name	Display only. Shows the name of the selected delegate.
Active From Date	Optional. If you want you can qualify this delegate's association with this role by date. Entering a from date will define the earliest date on which this delegate is a valid delegate for this role.

Active To Date	Optional. Allows you to deactivate a delegate's association with a role on a specific date. The date you enter defines the date on which the user is no longer a delegate for this role. **Note** You cannot delete or deactivate delegates. To remove a delegate from a role, enter an active to date.
Delegation Type Code	Required. Select 'Secondary' or 'Primary. Note that this selection only applies to responsibilities associated with the role and indicates if the delegate will receive documents directly in their action list (Primary) or may choose to view documents in their action list using the secondary delegate list (Secondary).
Actions	Click the **Add** button to add this delegate to the role.

Note

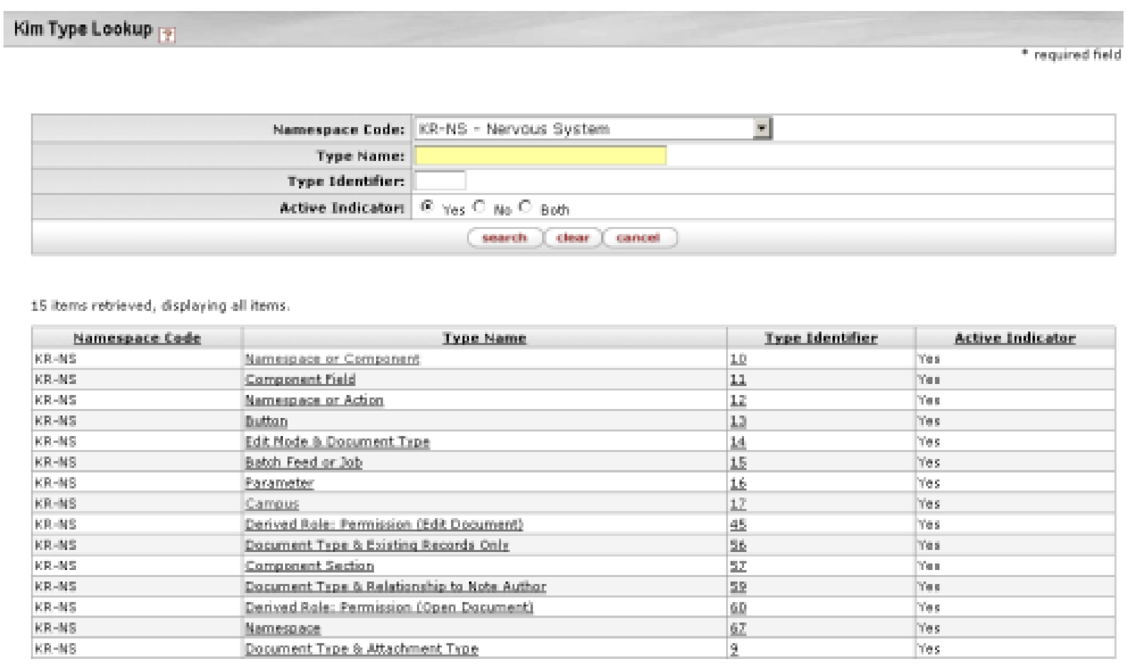
Additional fields may be required depending on the role type selected.

Role/Group/Permission/Responsibility Type

Admin > Identity Admin > • Role/Group/Permission/Responsibility Type > Kim Type Lookup

When the user selects the **Role/Group/Permission/Responsibility Type** option from the **Admin** menu tab, the system displays the Kim Type Lookup screen. Types are used to associate similar roles, groups, permissions and responsibilities. For example, all roles with the type of 'Campus' will collect a campus code for each member as a piece of qualifying data to tell KIM which campus that member is associated with. New types cannot be created via the interface. Development work needs to occur to make sure that KIM knows how to handle any new type added to the system.

Document Layout


Kim Type Lookup

* required field

Namespace Code: KR-NS - Nervous System
Type Name:
Type Identifier:
Active Indicator: Yes No Both

search clear cancel

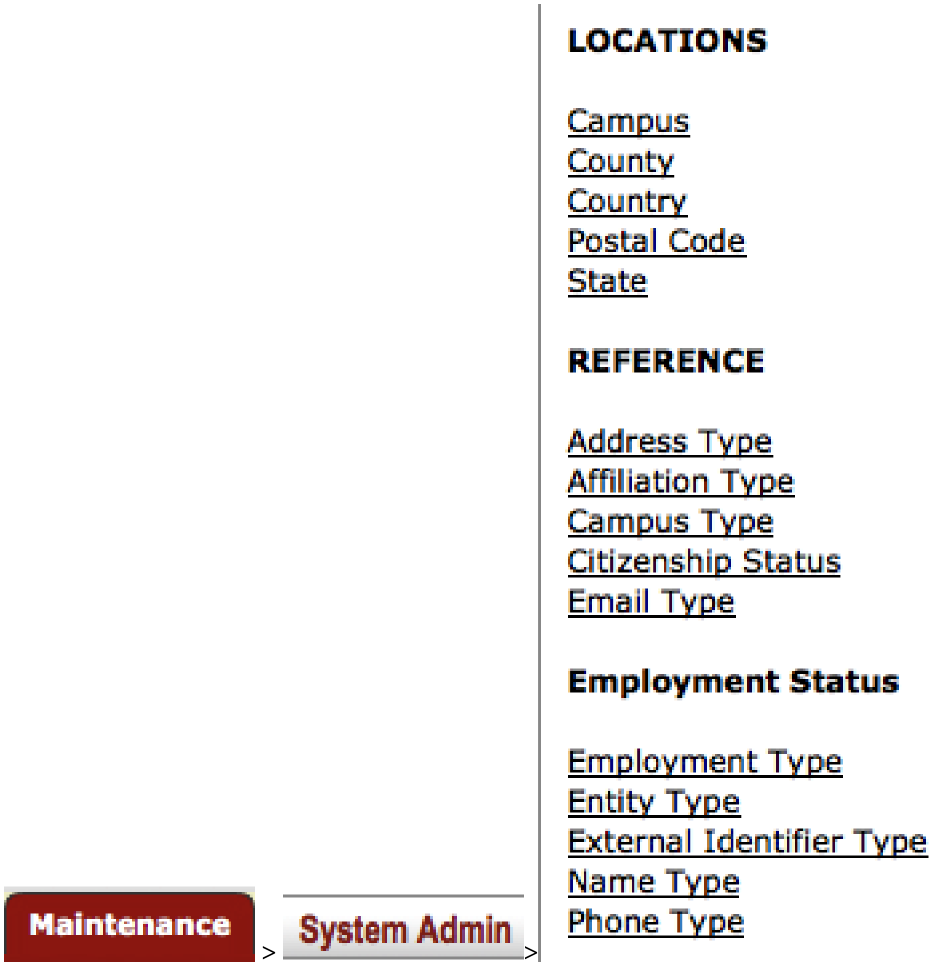
15 items retrieved, displaying all items.

Namespace Code	Type Name	Type Identifier	Active Indicator
KR-NS	Namespace or Component	10	Yes
KR-NS	Component Field	11	Yes
KR-NS	Namespace or Action	12	Yes
KR-NS	Button	13	Yes
KR-NS	Edit Mode & Document Type	14	Yes
KR-NS	Batch Feed or Job	15	Yes
KR-NS	Parameter	16	Yes
KR-NS	Campus	17	Yes
KR-NS	Derived Role: Permission (Edit Document)	45	Yes
KR-NS	Document Type & Existing Records Only	56	Yes
KR-NS	Component Section	57	Yes
KR-NS	Document Type & Relationship to Note Author	59	Yes
KR-NS	Derived Role: Permission (Open Document)	60	Yes
KR-NS	Namespace	67	Yes
KR-NS	Document Type & Attachment Type	9	Yes

Kim Type Lookup results definition

Title	Description
Namespace Code	Display only. The namespace code associated with this type.
Type Name	Display only. The descriptive name of this type. Clicking the name takes you to the Type Inquiry and displays the same information available in the lookup plus the name of the KIM service this type is associated with. The 'service' is the piece of code that tells KIM how to interpret roles, groups, permissions or responsibilities of a given type.
Type Identifier	Display only. The unique identifying number assigned to this type.
Active Indicator	Display only. Indicates whether this type is active. Inactive types are not eligible for selection when creating new roles, groups, permissions, or responsibilities.

Chapter 8. System Admin Maintenance Documents



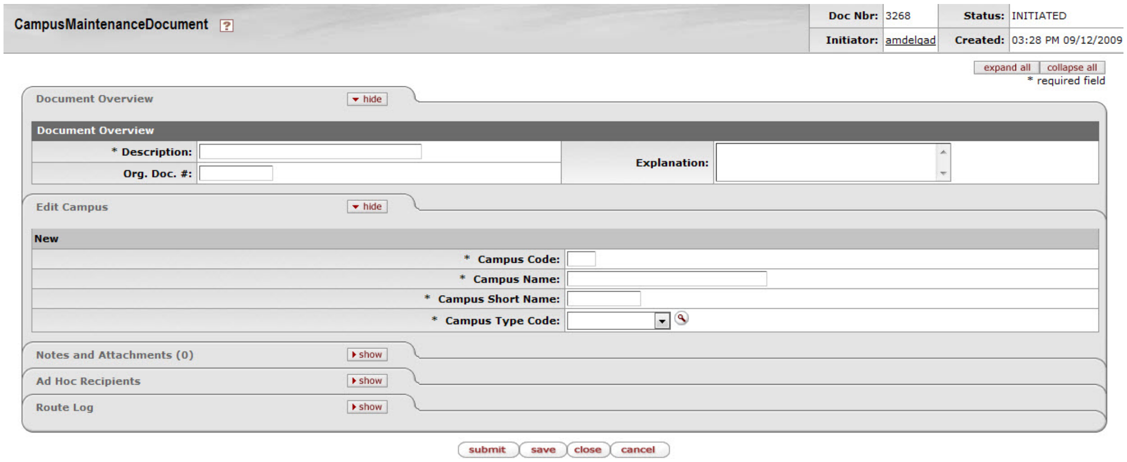
System Admin maintenance e-docs are available via the System Admin submenu on the **Maintenance** menu.

Campus

The CampusMaintenanceDocument is used to identify the different fiscal and physical operating entities of an institution for use in OLE. A campus may be identified as a fiscal entity, a physical entity, or both.

When the user chooses the Campus option, the system displays the Campus Lookup screen. After the user selects a campus or clicks the create new button, the system presents the CampusMaintenanceDocument.

Document Layout



Edit Campus Tab

The CampusMaintenanceDocument includes the **Edit Campus** tab.

In edit mode, the **Edit Campus tab** presents a display-only set of fields on the left and editable fields on the right in which the user may enter changes.

Edit Campus tab definition

Title	Description
Campus Code	Required. The unique identifying code assigned to a campus.
Campus Name	Required. The familiar name for a specific university campus.
Campus Short Name	Required. An abbreviated name for a specific campus; used in reports in which space is limited.
Campus Type Code	Required. Indicates the type of campus. Valid values are: B: - Both F - Fiscal P - Physical

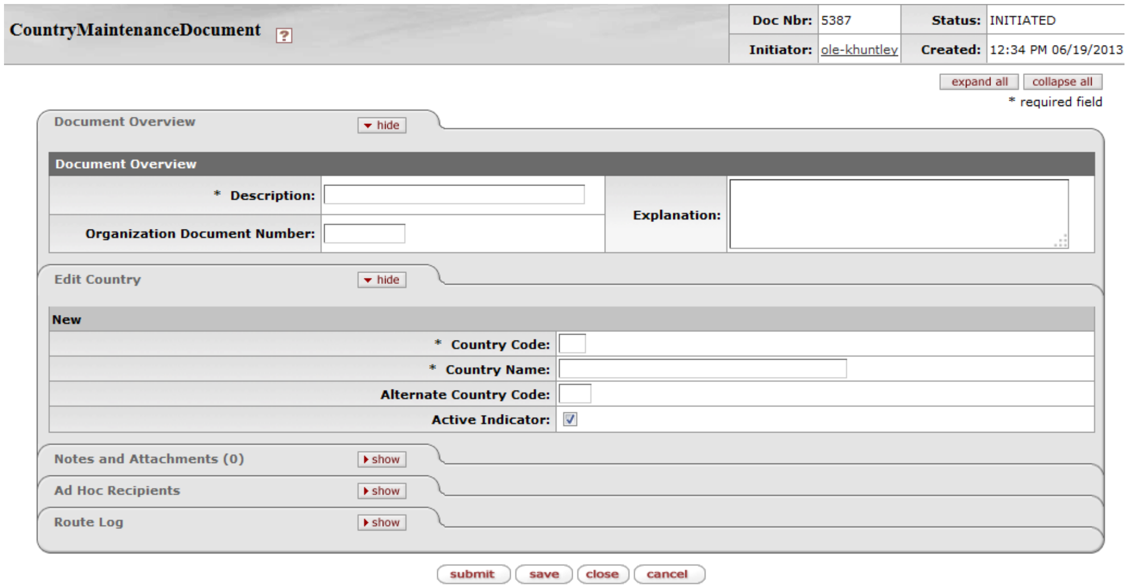
Country

Maintenance > System Admin > LOCATIONS > • Country > Country Lookup > CountryMaintenanceDocument

The Country Maintenance document is used to assign specific identifying codes to country names.

When the user chooses the **Country** option from the menu, the system displays the Country Lookup screen. After the user selects a country or clicks the **create new** button, the system presents the Country Maintenance document.

Document Layout



Edit Country Tab

The Country Maintenance document includes the **Edit Country** tab.

In edit mode, the **Edit Country** tab presents a display-only set of fields on the left and editable fields on the right in which the user may enter changes.

Edit Country tab definition

Title	Description
Country Code	Required. A unique identifying code assigned to a country.
Country Name	Required. A familiar name of a specific country.
Alternate Country Code	An alternative code assigned to a country.
Active Indicator	Indicates whether this country code is active or inactive in OLE. Remove the check mark to deactivate this country code.

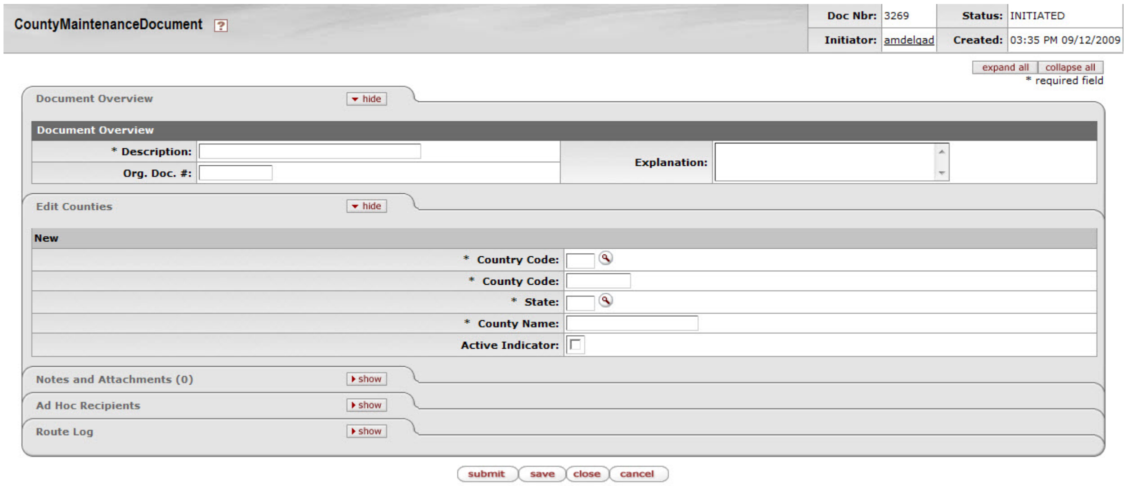
County

Maintenance > System Admin > LOCATIONS > • County > County Code Lookup > CountyMaintenanceDocument

The County Maintenance document is used to assign specific identifying codes to county names.

When the user chooses the **County** option from the **Admin** menu tab, the system displays the County Lookup screen. After the user selects a county or clicks the **create new** button, the system presents the County Maintenance document.

Document Layout



Edit Counties Tab

The County Maintenance document includes the **Edit Counties** tab.

In edit mode, the **Edit Counties** tab presents a display-only set of fields on the left and editable fields on the right in which the user may enter changes.

Edit Counties tab definition

Title	Description
Country Code	The country code for the country in which this county is located.
County Code	A unique identifying code assigned to this county.
State	The state abbreviation assigned to the state in which a county is located.
County Name	Required. The familiar name of this county.
Active Indicator	Indicates whether the county code is active or inactive in OLE. Remove the check mark to deactivate this county code.

Postal Code

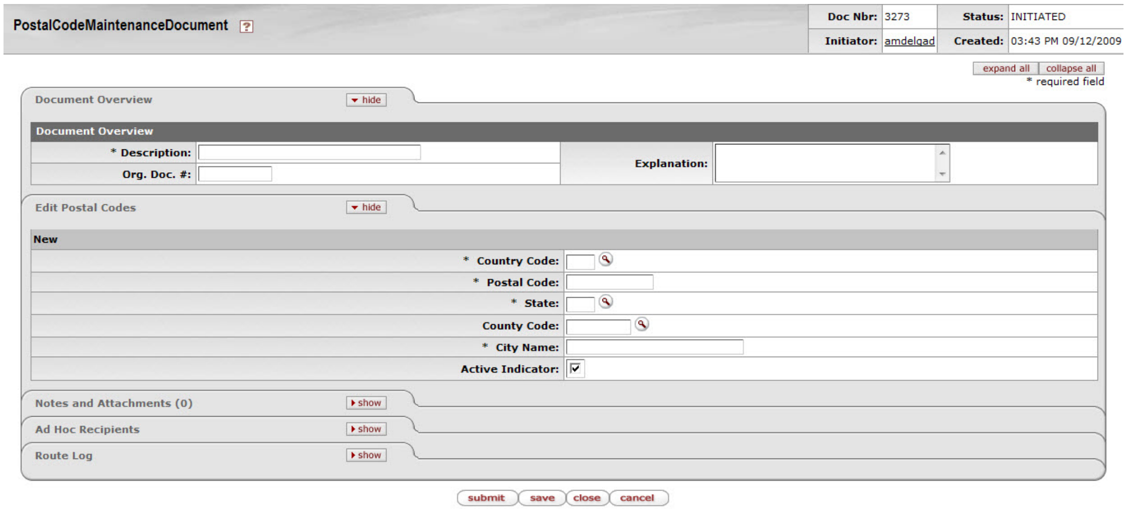
Maintenance > System Admin > LOCATIONS > • Postal Code > Postal Code Lookup > PostalCodeMaintenanceDocument

The Postal Code Maintenance document defines the zip code by city and state. When the user chooses the **Postal Code** option from the **Admin** menu tab, the system displays the Postal Code Lookup screen. After the user selects a postal code or clicks the **create new** button, the system presents the Postal Code Maintenance document.

Note

The user may also enter a city and state to find the associated zip code.

Document Layout



Edit Postal Codes Tab

The Postal Code Maintenance document includes the **Edit Postal Codes** tab.

In edit mode, the **Edit Postal Codes** tab presents a display-only set of fields on the left and editable fields on the right in which the user may enter changes.

Edit Postal Codes tab definition

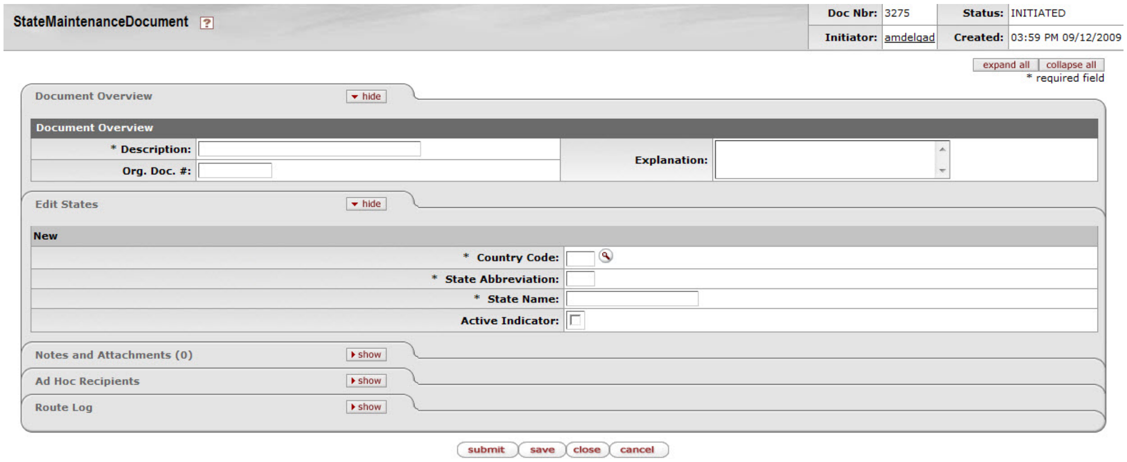
Title	Description
Country Code	The country code for the country associated with the zip (postal) code.
Postal Code	Identifies a Postal Service code.
State	Required. The state associated with the zip (postal) code.
County Code	The unique identifying code for the county associated with the zip (postal) code.
City Name	Required. The name of the city associated with the zip (postal) code.
Active Indicator	Indicates whether the postal code is active or inactive in OLE. Remove the check mark to deactivate this postal code.

State

Maintenance > System Admin > LOCATIONS > • State > State Code Lookup > StateMaintenanceDocument

The State Maintenance document defines the U.S. Postal Service codes used to identify states. When the user chooses the **State** option from the **Admin** menu tab, the system displays the State Code Lookup screen. After the user selects a state code or clicks the **create new** button, the system presents the State Maintenance document.

Document Layout



Edit States Tab

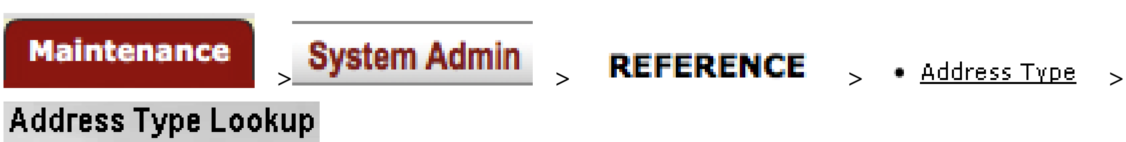
The State Maintenance document includes the **Edit States** tab.

In edit mode, the **Edit States** tab presents a display-only set of fields on the left and editable fields on the right in which the user may enter changes.

Edit States tab definition

Title	Description
Country Code	A unique identifying code assigned to the country of which this state is a part.
State Abbreviation	The state abbreviation.
State Name	Required. The full name of the state associated with the state abbreviation.
Active Indicator	Indicates whether the state code is active or inactive in OLE. Remove the check mark to deactivate the state code.

Address Type

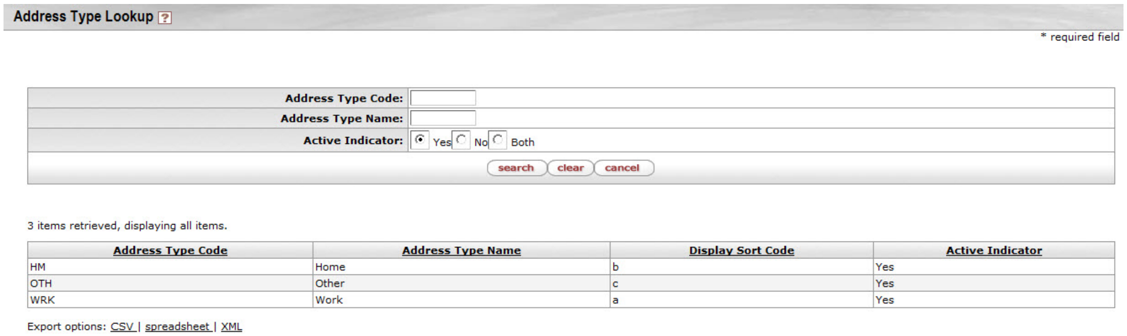


The Address Type Lookup displays the types of addresses that may be associated with Person records in KIM.

Note

Address types cannot be edited via the interface. Technical assistance is required to add new or edit existing address types.

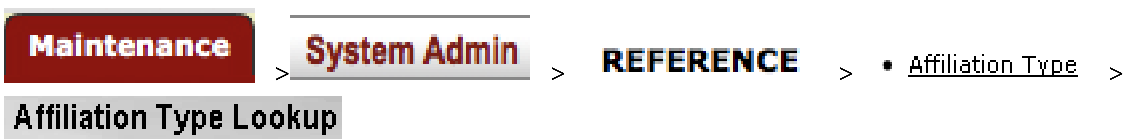
Document Layout



Address Type Lookup results definition

Title	Description
Address Type Code	Display only. The unique code for this type of address.
Address Type Name	Display only. The familiar title of this address type.
Display Sort Code	Display only. An alphabetical character used to determine the order in which address types are displayed in the list on the Person document.
Active Indicator	Display only. Indicates whether this address type is active (in which case the system displays it in the Address Type list on the Person document).

Affiliation Type

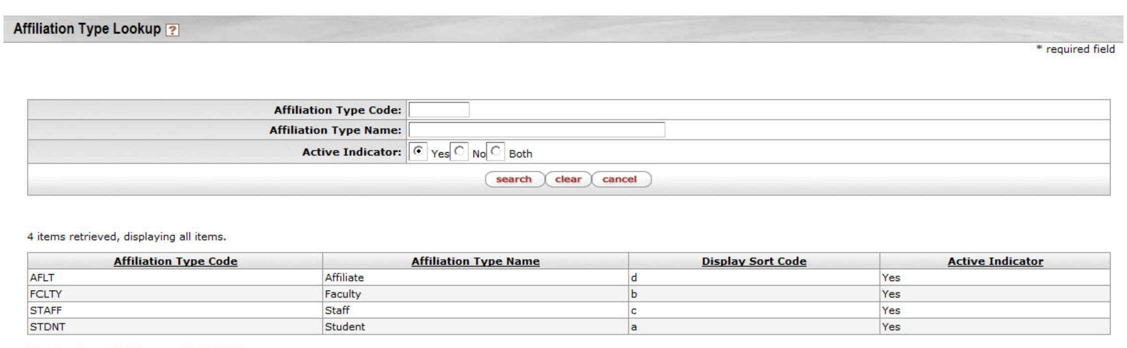


Affiliation types specify codes and text descriptions for the different types of affiliations that can be associated with a Person record in KIM. These codes may be used for data sorting or retrieval purposes. The Affiliation Type Lookup displays the valid affiliation code types.

Note

Affiliation types cannot be edited via the interface. Technical assistance is required to add new or edit existing affiliation types.

Document Layout



Affiliation Type Lookup results definition

Title	Description
Affiliation Type Code	Display only. A unique code that identifies this type of affiliation. The base values are: AFLT = Affiliate, FCLTY = Faculty, STAFF = Staff, STDNT = Student
Affiliation Type Name	Display only. A text description of this type of affiliation.
Display Sort Code	Display only. An alphabetical character used to determine the order in which the system displays affiliation types in the list.
Active Indicator	Display only. Indicates whether this type of affiliation is active (in which case the system displays it in the **Affiliation Type**list on the Person document).

Campus Type

When the user selects **Campus Type** from the **Admin** menu tab, the system displays the Campus Type Lookup. From this screen, the user may either create a new type or search for an existing type. This defines the valid types of campuses that can be selected when creating a new campus.

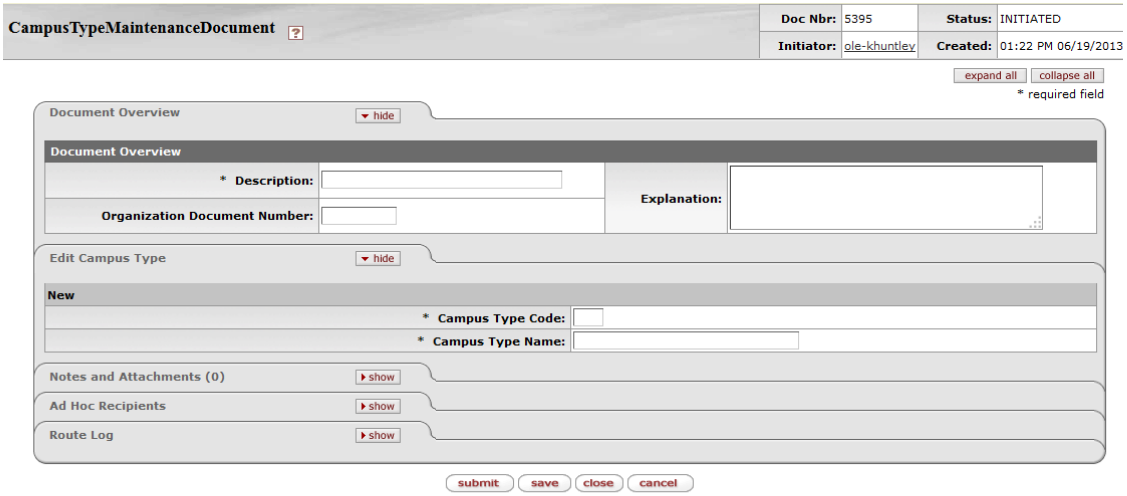
After performing a search based on user-specified criteria, the system displays a results table. The user may then choose to edit or copy a retrieved record.

After the user selects **create new**, **edit**, or **copy**, the system displays the Campus Type Maintenance document. This document allows users to add and maintain campus types.

Note

While anyone can view the current values for campus type, only members of OLE-SYS Manager or KR-SYS Technical Manager roles can create new campus types or edit existing values. This document does not route for approval.

Document Layout



Edit Campus Type Tab

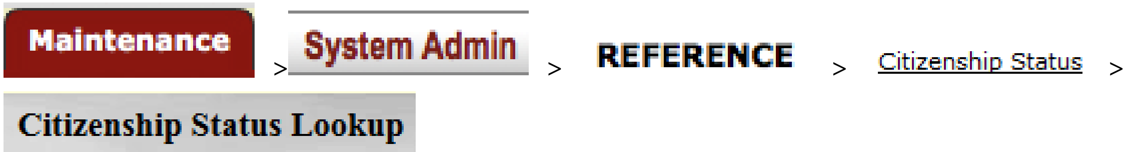
The Campus Type Maintenance document includes the **Edit Campus Type** tab.

In edit mode, the **Edit Campus Type** tab presents a display-only set of fields on the left and editable fields on the right in which the user may enter changes.

Edit Campus Type tab definition

Title	Description
Campus Type Code	Required. Enter a code to identify this type of campus.
Campus Type Name	Required. Enter a descriptive name for this campus type.

Citizenship Status

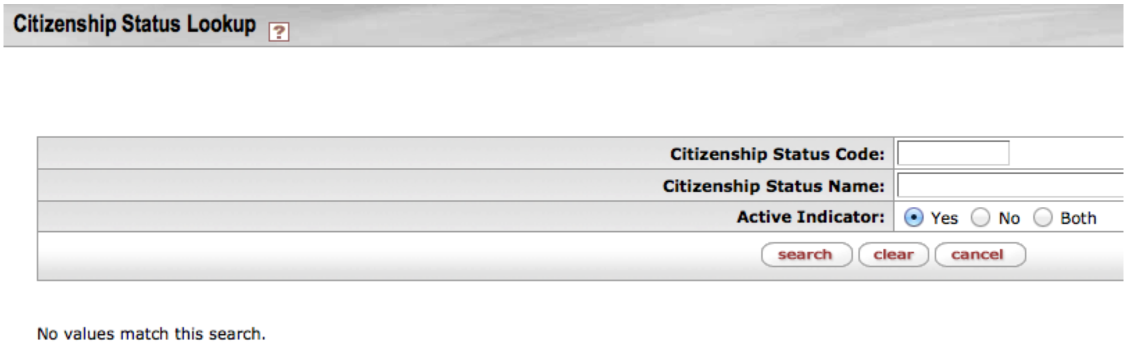


The Citizenship Status Lookup is used to display the types of statuses that may be entered on a Person record in KIM.

Note

Citizenship Status cannot be edited via the interface. Technical assistance is required to add new or edit existing status types.

Document Layout



Citizenship Status Lookup results definition

Title	Description
Citizenship Status Code	The code used to identify citizen status.
Citizenship Status Name	The familiar name of the citizen status.
Active Indicator	Display only. Indicates whether this citizen status type is active (in which case the system displays it in the **Citizen Status** list on the Person document).

Email Type

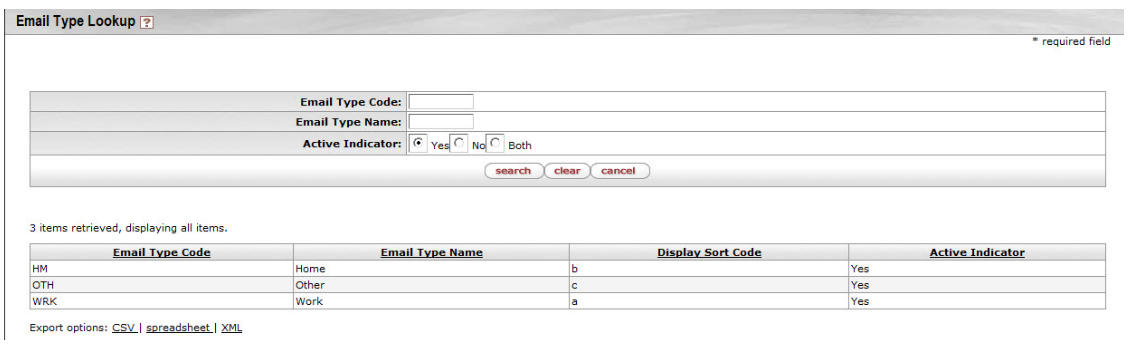
Maintenance > System Admin > REFERENCE > • Email Type > Email Type Lookup

The Email Type Lookup is used to display the types of email addresses that may be entered on a Person record in KIM.

Note

Email types cannot be edited via the interface. Technical assistance is required to add new or edit existing email types.

Document Layout



Email Type Code Lookup results definition

Title	Description
Email Type Code	Display only. A unique code identifying this type of email address. The base data values are: HM = Home, OTH = Other, WRK = Work
Email Type Name	Display only. A descriptive label for this type of email address.
Display Sort Code	Display only. An alphabetical character used to determine the order in which email address types are displayed in the list on the Person record.
Active Indicator	Display only. Indicates whether this email address type is active (in which case the system displays it in the **Email Type** list on the Person document).

Employee Type

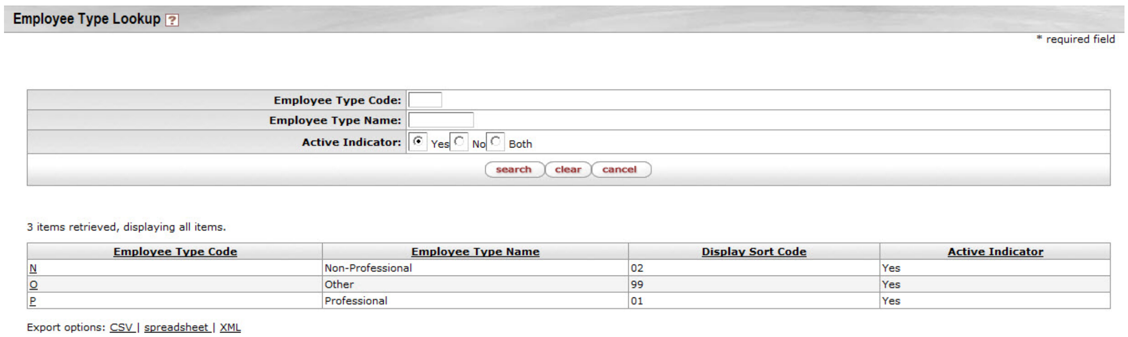
Maintenance > System Admin > Employment Status > • Employee Type > Employee Type Lookup

The Employee Type Lookup allows you to view the various status codes that can be assigned to a faculty or staff type of affiliation on the Person document in KIM.

Note

Employee types cannot be edited via the interface. Technical assistance is required to add new or edit existing employee types.

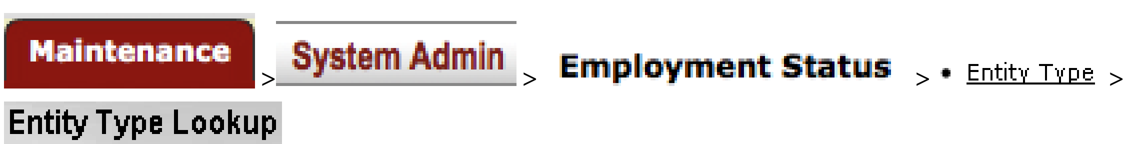
Document Layout



Employee Type Lookup results definition

Title	Description
Employee Type Code	Display only. A unique code identifying this type of employee. The base data values are: N = Non-Professional, O = Other, P = Professional
Employee Type Name	Display only. A descriptive label for this type of employee.
Display Sort Code	Display only. A numeric value used to determine the order in which employee types are displayed in the list.
Active Indicator	Display only. Indicates whether this employee type is active (in which case the system displays it in the **Employee Type** list on the Person document).

Entity Type

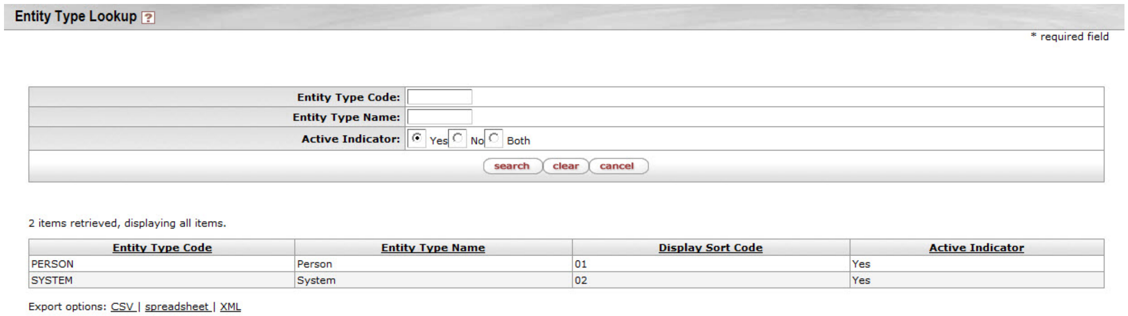


The Entity Type Lookup displays the various entity types recognized in KIM.

Note

Entity types cannot be edited via the interface. Technical assistance is required to add new or edit existing entity types.

Document Layout



Entity Type Lookup results definition

Title	Description
Entity Type Code	Display only. A unique code that identifies this entity type. The base data values are: PERSON = Person, SYSTEM = System
Entity Type Name	Display only. A descriptive label for this entity type.
Display Sort Code	Display only. A numeric value used to determine the order in which entity types would be displayed in a list.
Active Indicator	Display only. Indicates whether this entity type is active. Because entity types are not viewable elsewhere in the application, inactivation will have no apparent effect.

External Identifier Type

Maintenance > System Admin > Employment Status >

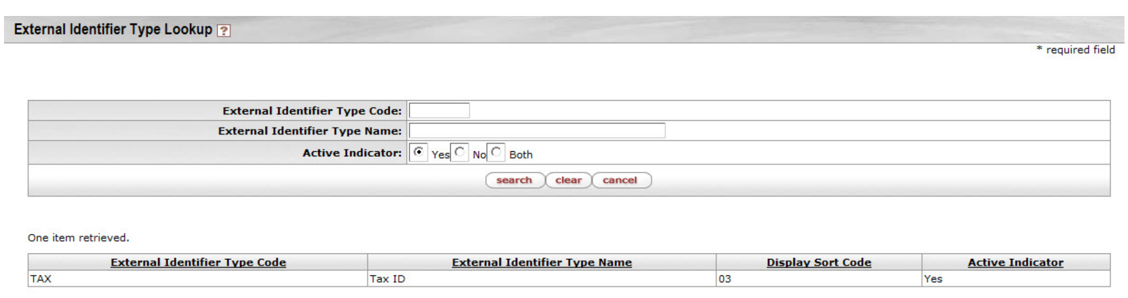
- External Identifier Type > External Identifier Type Lookup

The External Identifier Type Lookup displays the identifiers that may be associated with a Person record that has been generated by a non-Kuali system. The only example in OLE base data is Tax ID number.

Note

External identifier types cannot be edited via the interface. Technical assistance is required to add new or edit existing external identifier types.

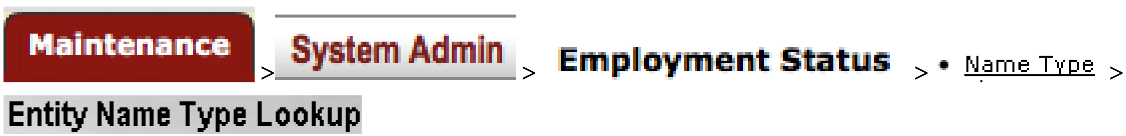
Document Layout



External Identifier Lookup results definition

Title	Description
External Identifier Type Code	Display only. A unique code that identifies this external identifier type. The base data value is: TAX = Tax ID
External Identifier Type Name	Display only. A descriptive label for this external identifier type.
Display Sort Code	Display only. A numeric value that determines the order in which external identifier types are displayed in the list.
Active Indicator	Display only. Indicates whether this external identifier type is active.

Name Type

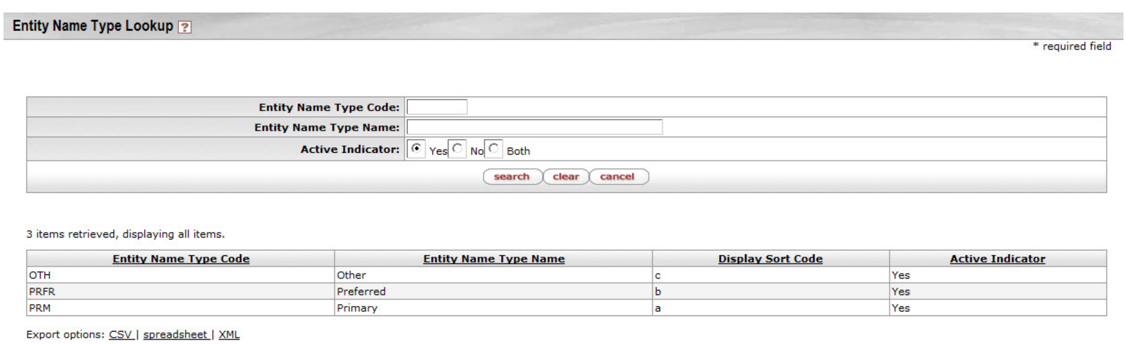


The Entity Name Type Lookup allows you to view the types of names that can be associated with a person on the **Contact** tab of a KIM Person document.

Note

Name types cannot be edited via the interface. Technical assistance is required to add new or edit existing name types.

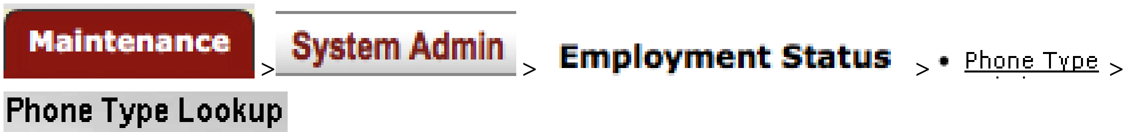
Document Layout



Entity Name Type Lookup results definition

Title	Description
Entity Name Type Code	Display only. A unique code that identifies this type of name. The base data values are: OTH = Other, PRFR = Preferred, PRM = Primary
Entity Name Type Name	Display only. A descriptive label for this name type.
Display Sort Code	Display only. An alphabetic value that determines the order in which name types are displayed in the list.
Active Indicator	Display only. Indicates whether this name type is active (in which case the system displays it in the **Name Type**list on the Person document).

Phone Type

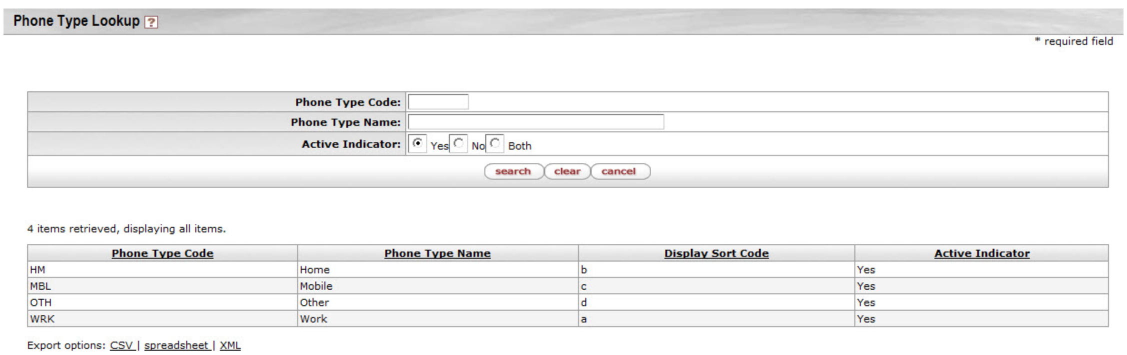


The Phone Type Lookup displays codes that identify various categories of phone numbers on the Person document.

Note

Phone types cannot be edited via the interface. Technical assistance is required to add new or edit existing phone types.

Document Layout



Phone Type Lookup results definition

Title	Description
Phone Type Code	Display only. The code that identifies the type of phone number.
Phone Type Name	Display only. The descriptive name for this type of phone number.
Display Sort Code	Display only. An alphabetic value that determines the order in which phone types are displayed in the list.
Active Indicator	Display only. Indicates whether this phone type is active (in which case the system displays it in the **Phone Type** list on the Person document).