Guide to OLE Basic Functionality and Key Concepts

Table of Contents

Introduction

This guide provides information about general OLE concepts and gives instructions for performing core functionality.

This guide is organized in this manner:

- The first section gives information for navigating through the OLE system. This includes OLE's tabs, screen elements, logging on and off the system, and some sample users for the test environment.
- OLE E-Doc Fundamentals provides information about the structure of OLE's e-documents. This includes a description of the standard tabs, such as Notes and Attachments and Route Log, and an explanation of performing basic operations and searches.
- OLE Maintenance Document Fundamentals provides information abou the structure of OLE's maintenance documents. This includes a description of the standard tabs, an explanation of performing basic operations, as well as some fiscal year information and extended attribute notes carried over from KFS.
- The next section gives general information about workflows within OLE and explains the Route Log and Action List.
- The final section gives information on importing accounting information for Select and Acquire and provides links to sample data to be used in the test environment.

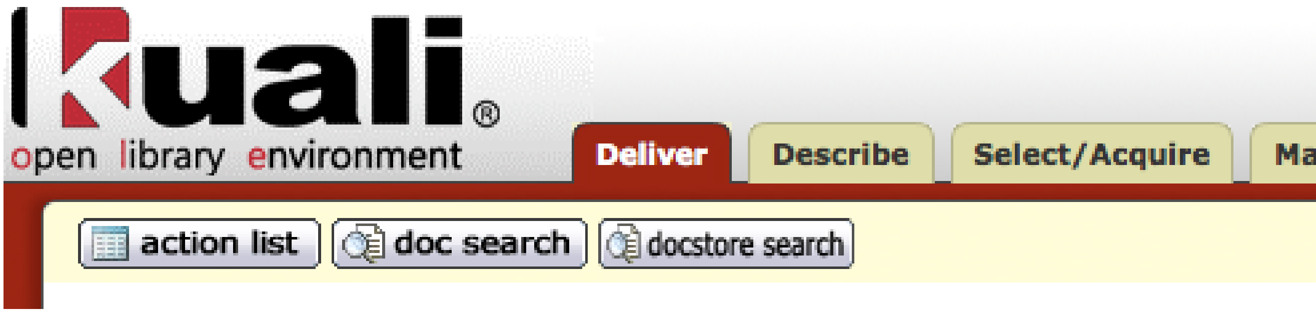
This guide as well as guides to other OLE modules are available for download from the OLE Documentation Portal.

Chapter 1. Navigating Through OLE

After you access OLE by typing or pasting the URL for it into your browser's address bar, you need to know where to find information and how to navigate. This section covers these topics.

OLE's Menus

The OLE portal is divided into modules. When entering the portal,you will see five menu tabs:

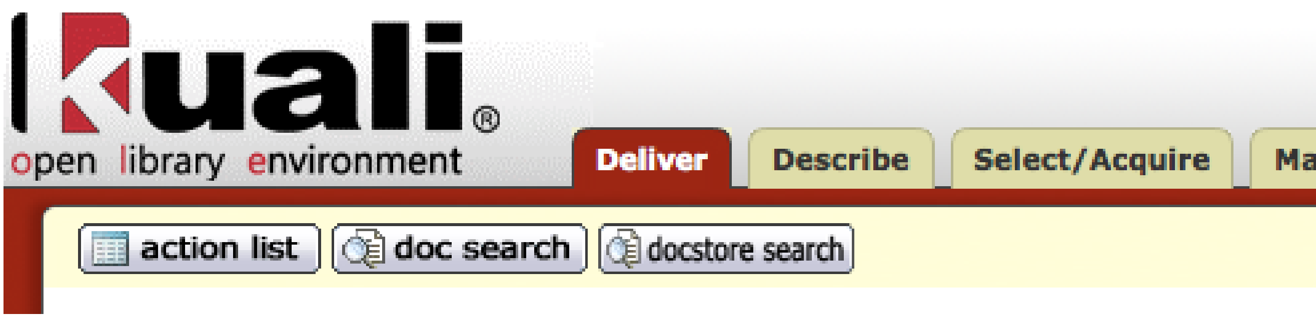


The **Deliver tab** displays e-docs and interfaces for circulation and patron management. The **Describe** tab displays e-docs and interfaces for cataloging processes. The**Select/Acquire** tab displays the list of transactions and functions that are associated with the financial processes and purchases as well as the E-Resources and Licensing, the beginning feature of electronic resource management (more development is scheduled for 2.0). The **Maintenance** tab includes the related maintenance documents for the four other tabs. The **Administration** menu tab displays the list of functions that only technical staff or super users in the functional area are likely to use. It also contains batch processing e-docs and interfaces.

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.

OLE Deliver Menu



The Deliver menu lists interfaces and electronic documents that persons with circulation permissions may access.

Deliver Menu Submenus

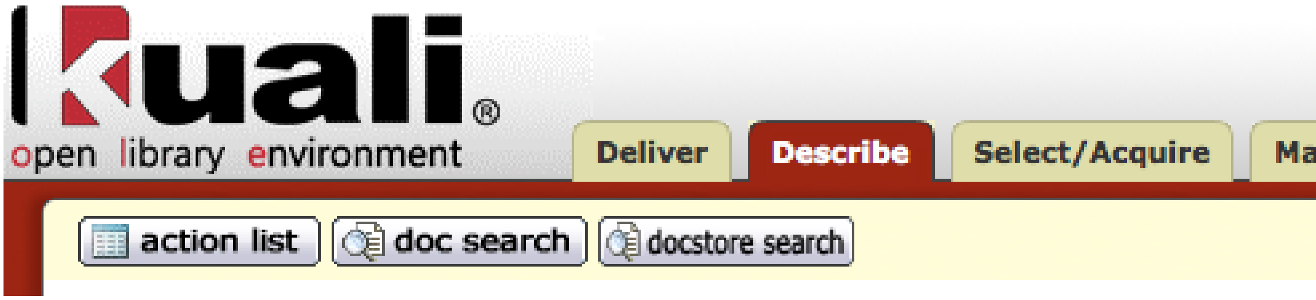
Category	Description
Circulation	Allows for the loan, return, and request of library materials as well as viewing the bill of a particular item.
Patron	Allows for the management of patron records and patron bills.

Each of these submenus are further divided.

Note

For information on working with the Deliver functions listed on this tab, see the *Guide to the OLE Deliver Module.* This and other OLE user guides are available from OLE Documentation Portal.

OLE Describe Menu



The Describe menu lists interfaces and electronic documents that persons with cataloging permissions may access.

Describe Menu Submenus

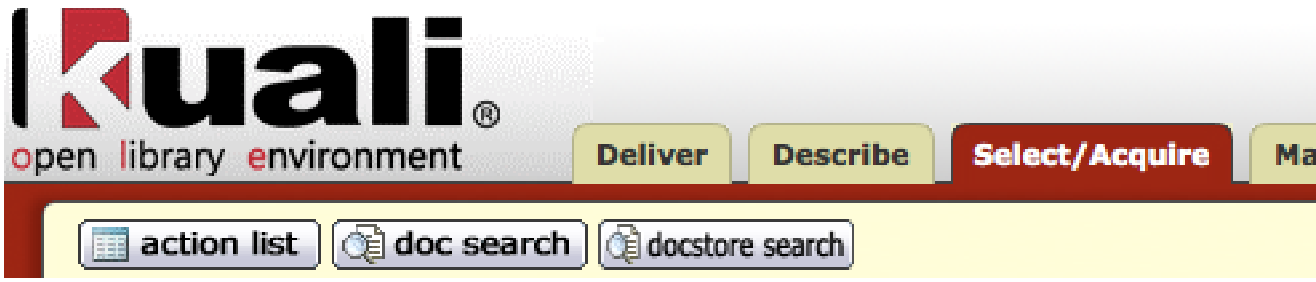
Category	Description
Create/Edit Titles, Holdings or Items	Allows for the management of library records: editors for single records, global edits of holdings, items and e-holdings.
Link Titles, Holdings or Items	Allows users to link records: create boundwiths, transfer, and analytics
Singe Record Export/Import	Allows user to import and export single records
Reports	Under Development

Each of these submenus are further divided.

Note

For information on working with the Describe functions listed on this tab, see the *Guide to the OLE Describe Module.* This and other OLE user guides are available from OLE Documentation Portal.

OLE Select/Acquire Menu



The Select/Acquire menu lists electronic documents and functions that departmental users are usually allowed to initiate.

Select/Acquire Menu Submenus

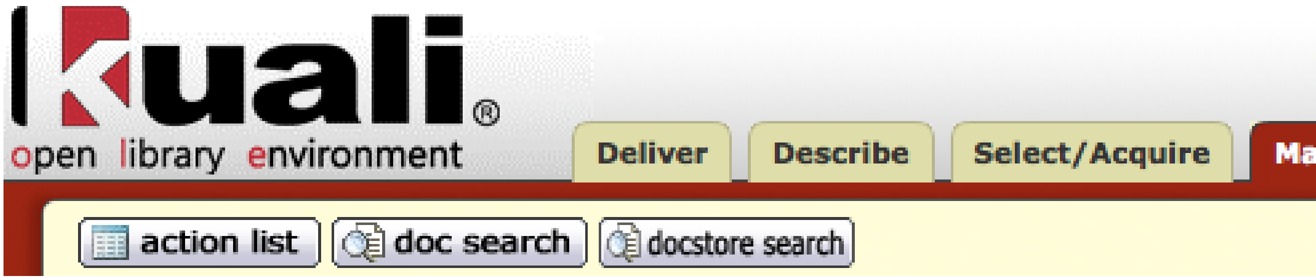
Category	Description
Ordering	Allows for the requisitions, or ordering, of library materials. Transactions are recorded in e-docs that are then posted to the General Ledger and affect the financial statements of the organization.
Fund	Allows the financial representation of a basic business activity. Transactions are recorded in e-docs that are then posted to the General Ledger and affect the financial statements of the organization. Examples of transactions are budget adjustments and transfer of funds. Additionally, users can review fund balances from the Fund Balances lookup.
Licensing	Allows for the management of License Requests. License Requests must be initiated through E-Resource Records.
Paying	Allows for invoicing, creating credit memos and claiming library materials. Transactions are recorded in e-docs that are then posted to the General Ledger and affect the financial statements of the organization.
Vendor	Allows access to vendor records.
Electronic Resources	Allows users to create and search E-Resource Records.
Receiving	Allows for the receiving of monographs and serials into OLE.
Import	Allows access to view various types of loaded records. Imports are done from the **Batch Processes** submenu on the **Admin** menu tab.
All Acquisitions Records	Acquisitions Search searches all financial documents.
Reports	Allows access to review fund balances: available balances displays the culminating account balance while cash balances displays the bottom line snapshot of your account. Organization Review is also listed here. It allows users to create additional reviewers to watch account or departmental activities.
Others	Allows access to Donor reports, General ledger and Year End documents

Each of these submenus are further divided.

Note

For information on working with the Select and Acquire functions listed on this tab, see the *Guide to the OLE Select and Acquire Module.* This and other OLE user guides are available from OLE Documentation Portal.

OLE Maintenance Menu



The Maintenance menu lists electronic documents that allows users to view and/or edit the maintenance tables.

Maintenance Menu Submenus

Category	Description
Cataloging Admin	Allows central maintenance of documents that support Describe documents.
Chart of Accounts	Allows central maintenance of COA documents.
Circulation Admin	Allows central maintenance of documents that support circulation.
Patron Admin	Allows central maintenance of documents that support the patron documents.
Vendor Admin	Allows central maintenance of documents that support the Vendor document.
Lookup	Allows users to assign delegates to accounts
E-Resource Admin	Allows central maintenance of documents that support Electronic Resouces, Licenses, and Agreements
Select & Acquire Admin	Allows central maintenance of documents that support ordering, paying and receiving.
System Admin	Allows central maintenance of documents that support KIM System documents on the **Admin** menu tab: roles, permissions, person, etc.
Pre-Disbursement Processor	Allows central maintence for sending fiscal documents to university financial systems.

Each of these submenus are further divided.

Note

For information on working with these maintenance documents, see the corresponding Module Guides available from OLE Documentation Portal.

A note on Admin Submenus/Maintenance Documents

The Admin submenu, often noted as "xxx Admin" where xxx is the name of another submenu, provides access to a variety of user-defined reference tables that are essential to OLE. These tables define attributes the system uses to validate e-documents and interfaces and allow users to look up values as necessary. The tables also control the often-complex relationship between elements for internal and external reporting. For example, OLE relies on maintenance tables for basic information such as the sub-fund groups to which new accounts may be assigned and the calendar month that correlates to the first month of your institution's fiscal year. This table-controlled flexibility is one of the features that make OLE a highly configurable application.

These important reference tables are maintained by electronic documents called maintenance documents or e-docs. Each of the OLE reference tables is maintained by a specific maintenance e-doc that is routed for approval before the table is updated

Tip

All users can look up values in the OLE reference tables via the lookup screens on the maintenance menu, but only members of manager-type roles may initiate most maintenance documents.

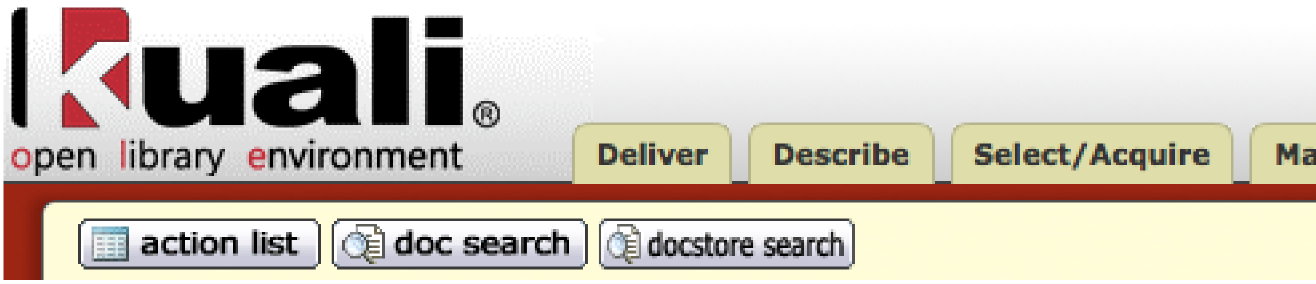
Note

Your institution may choose to add attributes to maintenance tables for reporting purposes. For information on adding these 'extended' attributes, see Extended Attributes.

Note

For information about initiating maintenance documents, see Performing Common Maintenance E-Doc Operations.

OLE Admin Menu



Kuali OLE enables users with proper permissions to perform a number of administrative functions that affect the entire system. These functions, which are accessible via the **Admin** menu tab, allow authorized users to:

- Import and export bibliographic, holding, item and e-holding records through batch processes
- Support the Kuali Identity Management (KIM) module
- 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.

Admin Menu Submenus

Category	Description
Batch Processes	Allows for the creation of batch profiles, accessing and managing maintenance tables for batch profiles, and batch importing of various types of OLE records.

	Allows you to view job schedules and manage key OLE FS batch processes.
Monitoring	Allows users to monitor messages that are flowing through the service bus, view the Service Registry for it, and change the size of its thread pool. Also allows users to access any document in order to perform operations on it and generate statistics reports.
Testing	Provides access to the data dictionary configuration key as well as the web service proof-of-concept request form.
Documentation	Provides links to OLE's user documentation.
Services & Functions	Allows access to test the RESTful API, SOLR queries, and administrate over the OLE DocStore (check-in, check-out, delete items, etc). Also allows users to merge patron records.
System Configuration	Provides access to a variety of functional and technical configuration options that affect the entire OLE.
Workflow Admin	Allows users to access documents associated with KEW workflows.
KRMS Admin	Allows users to create and modify KRMS rules for OLE.
Identity Admin	Provides a means of viewing and updating OLE user identification information; defining valid values for various types of location information; and defining valid types of personal information collected for the Identity module.

Each of these submenus are further divided.

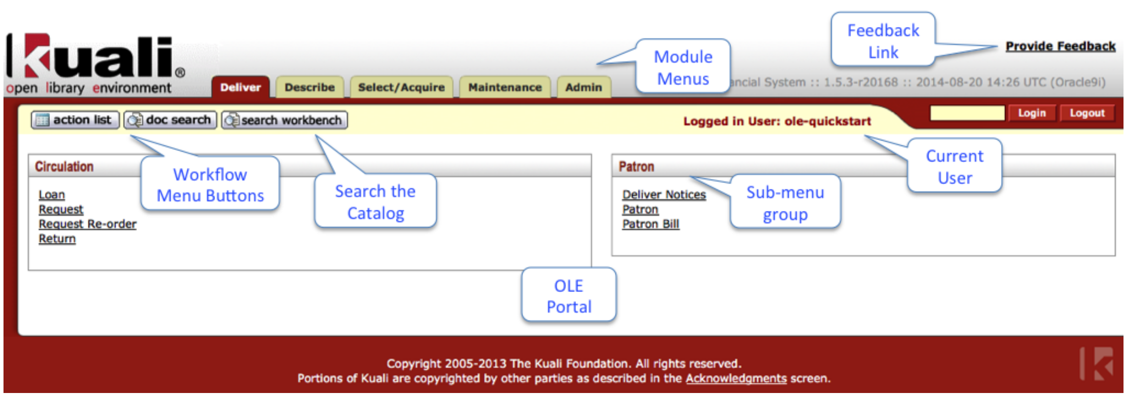
Note

For information on working with the Administrative functions listed on this tab, see the *Guide to the OLE System Administration Module.* This and other OLE user guides are available from OLE Documentation Portal.

Screen Elements

Each menu tab is organized into multiple submenus that group similar types of functions. Each menu tab also has these standard features:

- Workflow functionality is accessible from **action list** and **doc search** buttons in the upper-left corner of the screen.
- A **Message of the Day** can be displayed on the top of the screen.
- The current user is displayed on the upper right corner of the screen.
- A **Provide Feedback** link on the upper right corner of the screen allows anyone to report bugs, issues, and suggestions.



Message of the Day

All tabs include the **Message of the Day** at the top of the screen to quickly distribute messages to all OLE users on-line.

Tip

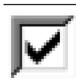
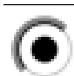
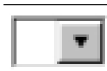
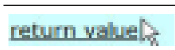
Updating the Message of the Day: If no message of the day is defined in the system, the **Message of the Day** area is not displayed on the screen. To define the message of the day, initiate the Message of the Day e-doc from the **Admin** menu tab.

For more information, see Message of the Day in the *Guide to the OLE System Administration Module*.

Standard Data Entry, Selection, Action, and Navigation Tools

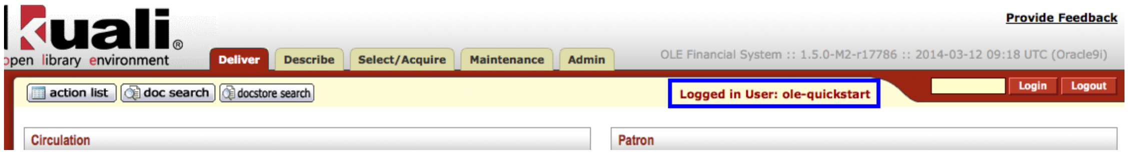
Online forms within this web-based software application allow you to enter and select information and to perform actions and navigate, both within and outside the system. The following table briefly outlines the basic tools.

Basic OLE Tools

Element	Description
	**Box** (a.k.a. edit box, text box, or entry field): A rectangular box in which you can type text. If the box already contains text, you can select that default text or delete it and type new text. Use a keyboard to type or clipboard to paste text and numbers into the field.
	**Check box** (a.k.a. selection box): A square box that is selected or cleared to turn on or off an option. More than one check box can be selected. Use a mouse to click within the box to place a check mark symbol to indicate the option is selected.
	**Option** (a.k.a. radio button, option button): A round button used to select one of a group of mutually exclusive options. Use a mouse to click within the circle. The dot symbol indicates that the option is selected.
	**List** (a.k.a. drop-down menu, combo box, or list box): A box with an arrow indicating a list that drops (expands) downward for viewing (may expand upward to take advantage of available screen real estate). Click the down arrow icon to list menu options, and then click the text to highlight and select an option.
	**Button** (a.k.a. command button, action button): A rectangular button with a text label that indicates the action to be performed. Use a mouse to click the button to initiate the action.
	**Link**: An internal hyperlink to a different place on the current page, a different screen within the current application, or a related system. Use your mouse to click on the underlined text to cause the desired information to appear.

Logging On and Off OLE

When launching OLE's demo and test environments, you will be automatically logged in with the default user id: ole-quickstart.



To log off from OLE, simply close the Web browser by clicking the standard browser's **Close** (X) button located in the upper right corner. Clicking **Logout** simply returns you to the default user, ole-quickstart.

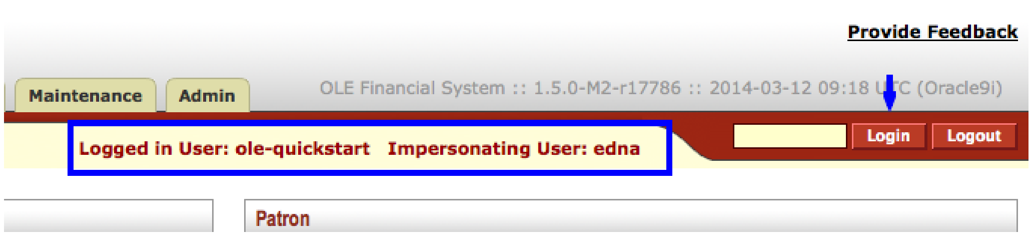
Switching Users

In OLE's demo and test environments, you have the ability to simulate being logged in as various users (sample users noted below). To accomplish this, type the user id you wish to login as into the text entry box next to the Login button and click Login.

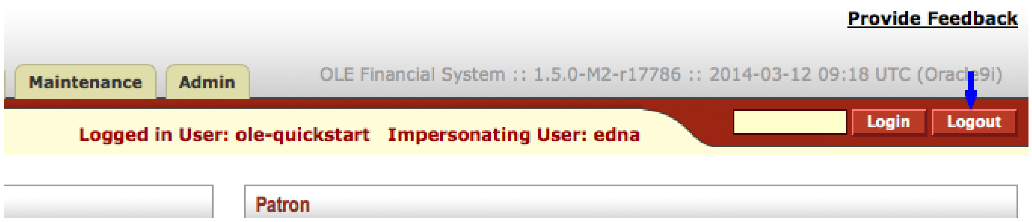
The ability in this demo environment to simulate being logged in as various users gives you the permissions required to try out each stage of specific workflows where approvals or actions are required by multiple user types. (Since this functionality is only meant for testing purposes, it will not be included in later releases.)

Tip

When logged in as ole-quickstart and impersonating another user, you may switch the user you are impersonating by again entering the user id into the text entry box next to the Login button and clicking **Login**:



To return to the original state - logged in only as ole-quickstart - click the **Logout** button:



User IDs and Roles

Note

These roles are set up for OLE's Test Drive and may not apply to local environments.

Module	Role Name	User ID	Description
Describe	Batch Cataloging	catbatch	Authorized to do batch imports and exports
Describe	Cataloger 1	cat1	Authorized for all Describe functions; permission to administer cataloging within assigned work unit
Describe	Cataloger 2	cat2	Authorized for all Describe functions except batch imports and bound-withs; permission to administer cataloging within assigned work unit
Describe	Cataloger Supervisor	catsup	Authorized for all Describe functions; permission to administer cataloging within assigned work unit(s)
Describe	Cataloging Super User	admin; supercat	Authorized for all Describe functions; permission to administer cataloging in all work units
Describe	Describe Read only	describereadonly	Authorized only to view records in Describe
Describe	Full Cataloging	catfull	Authorized for all Describe functions without limitation by ownership,work unit, bibliographic status or any other field-level permission restriction
Describe	OLE_Cataloging_Admin	admin; admin1	Initiate Catalogue Document
Describe	Temporary (Student) Staff Cataloger 1	tempcat1	Authorized to create and edit holdings/items within assigned work unit
Deliver	Operator	edna	Operator
Select/Acquire	OLE_LicenseAssignee	OLE_LicenseManager	This role will have the persons who can assign the License Request Document.
Select/Acquire	OLE_LicenseConfiguration	admin	This is a licensing superuser with authority to set default system configuration VALUES, such as the default notification period after inactivity.
Select/Acquire	OLE_LicenseManager	frank	Group of users who actually do the work of license negotiation used for routing purposes.
Select/Acquire	OLE_LicenseReviewer	edna	This role is a person with the authority to sign a license.
Select/Acquire	OLE_Licenses	fred	OLE_Licenses are the assignees for Requisitions requiring licenses or license negotiations. This role

			is the ?owner? of the license agreement, and has full edit, attachment, routing, and status change permissions.
Select/Acquire	OLE_LicenseViewer	<any Kuali user>	License documents and Search on Licenses have very limited permissons. This role can \"view only\" Agreements, Agreement docs, License Requests.
Select/Acquire	OLE_Licensing_Approver	supervisr	OLE_Licensing_Approver will receive License Requests in status ? Complete? as final step in workflow.
Select/Acquire	OLE_Signatory	eric	This role is a person with the authority to sign a license. Note: this role may not be used within OLE if license must be signed by an external party (outside of OLE).
Deliver	Circ Desk Attendant I	tester; tester1; testrole; user1	Circ Desk Attendant I
Deliver	Circ Desk Attendant II	edna; eric	Circ Desk Attendant II
Deliver	Circulation Supervisor	dev1; dev2	Circulation Supervisor
Deliver	Deliver Admin	admin; admin1	Deliver Admin
Deliver	Full Circulation Attendant	dev1; dev2	Edit Patron Document
Deliver	Limited Circulation Attendant	testuser1; testuser 2	View Patron Document,no access to borrowerType
Deliver	Location Administrator	admin; admin1	Edit and View the Location Level Document
Deliver	Operator	API; dev2; edna; eric; PALCI	Operator
Deliver	Patron Manager	admin; admin1	All the Permissions of Patron and BorrowerType
Deliver	Shelving Location Administrator	dev1; dev2	View Location Level Document
Deliver	Super Circulation Supervisor	admin; admin1	Super Circulation Supervisor
Deliver	Unit Manager	dev1; dev2	UnitManager
Select/Acquire	Accounts Payable Processor	ole-aatwood; ole-jxlinder	Accounts Payable users who can initiate Payment Requests and Credit Memo documents. They also have several permissions related to processing these document types and receive workflow action requests for them.
Select/Acquire	Accounting-AQ1	ole-brunelle	This Role is for View only document(Not for edit)
Select/Acquire	Accounting-AQ2	ole-cphovis	This Role is for low-level staff with specific needs only. This role is able to create and edit selected functions: payment requests, credit memos, disbursement vouchers, invoices)
Select/Acquire	Accounting-AQ3	ole-cstan; ole durbin	This Role is for staff performing function. This role is able to create and edit all functions (payment requests, purchase orders, credit memos, disbursement vouchers, invoices).
Select/Acquire	Accounting-AQ4	ole-earley; ole-ejacob	This Role is for when you want to restrict deletion to high-level staff. This role is able to create edit or delete all functions (payment requests, purchase orders, credit memos, disbursement vouchers, invoices, COA maintenance).
Select/Acquire	Acquisitions-AQ1	ole-brunelle	This Role is for View only document(Not for edit)
Select/Acquire	Acquisitions-AQ2	ole-cphovis; ole-ejacob	This Role is for low-level staff with specific needs only. This role is able to create and

			edit selected functions (receiving, purchase orders, requistions, payment requests).
Select/Acquire	Acquisitions-AQ3	ole-cstan; ole-durbin	This Role is for staff performing function. This role is able to create and edit all functions (receiving, purchase orders, requisitions, payment requests, vendors).
Select/Acquire	Acquisitions-AQ4	ole-cstan; ole-earley	This Role is for when you want to restrict deletion to high-level staff. This role is able to create edit or delete all functions (receiving, purchase orders, requisitions, payment requests, vendors, PURAP maintenance).
Select/Acquire	Acquisitions-AQ5	ole-ejacob; ole-fermat; ole-flaherty	This role can perform functions and assign appropriate security level to others (receiving, purchase orders, requisitions, payment requests, vendors, PURAP maintenance).
Select/Acquire	Collection Management	admin	This Role can close/cancel E-Resource Record if it is currently assigned to this group and Can approve/route to Acquisitions for purchase.
Select/Acquire	Financial-AQ1	ole-brunelle	This Role is for View only document(Not for edit)
Select/Acquire	Financial-AQ2	ole-cphovis	This Role is for low-level staff with specific needs only. This role is able to create and edit selected functions (purchase orders, payment requests).
Select/Acquire	Financial-AQ3	ole-durbin; ole-fermat	This Role is for staff performing function. This role is able to create and edit all functions (purchase orders, payment requests, invoices).
Select/Acquire	Financial-AQ4	ole-earley; ole-ejacob	This Role is for when you want to restrict deletion to high-level staff. This role is able to create edit or delete all functions (budget documents, transfer funds, deposit documents, COA maintenance, purchase orders, payment requests, edit sufficient fund checks and restrictions).
Select/Acquire	Financial-AQ5	ole-cstan; ole-flaherty	This role can perform functions and assign appropriate security level to others (budget documents, transfer funds, deposit documents, COA maintenance, , purchase orders, payment requests, edit sufficient fund checks and restrictions).
Select/Acquire	OLE_Acquisitions-select	admin; admin1	This Role performs can create edit view but not delete E-Resource Records.
Select/Acquire	OLE_Cataloger	admin1	This role can only view E-Resource Record.
Select/Acquire	OLE_E-Resource	admin	This role Can create edit delete E-Resource Record start any sub-workflow link to GOKb particular focus is on Activation and using the Access Dashboard.
Select/Acquire	OLE_E-ResourceManager		This role manages site-wide configurations like values for the E-Resource status and time periods for alerts.
Select/Acquire	OLE_Head	admin	This Role performs can create edit view but not delete E-Resource Records.

Select/Acquire	OLE_Load	ole-ejacob; ole-jpaul	This Role is assigned to admin for Loading
Select/Acquire	OLE_Selector	admin	This Role edits, creates and close/ cancel the E-Resource records if it is currently assigned to this group and also can begin the Trial
Select/Acquire	Operator	dev2	Operator for Serial Receiving
Select/Acquire	Receiving-AQ1	ole-brunelle	This Role is for View only document(Not for edit)
Select/Acquire	Receiving-AQ2	ole-cphovis; ole-ejacob	This Role is for low-level staff with specific needs only. This role is able to create and edit selected functions (receiving).
Select/Acquire	Receiving-AQ3	ole-durbin	This Role is for staff performing function. This role is able to create and edit all functions (receiving, payment requests, purchase orders, invoices).
Select/Acquire	Receiving-AQ4	ole-cstan; ole-earley	This Role is for when you want to restrict deletion to high-level staff. This role is able to create edit or delete all functions (receiving, payment request,purchase orders, invoices, receiving maintenance).
Select/Acquire	Reviewer	ole-cofya; ole-eurainer; ole-jtlieb	This role receives workflow action requests for the Vendor document.

Chapter 2. OLE E-Doc Fundamentals

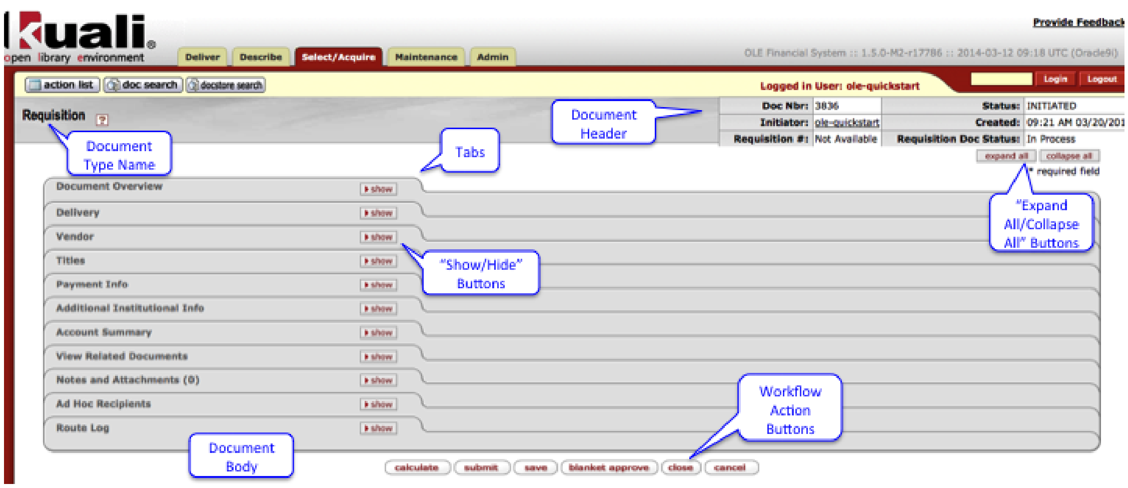
The following sections describe the page layout, common attributes of an e-doc, and basic functions.

Note

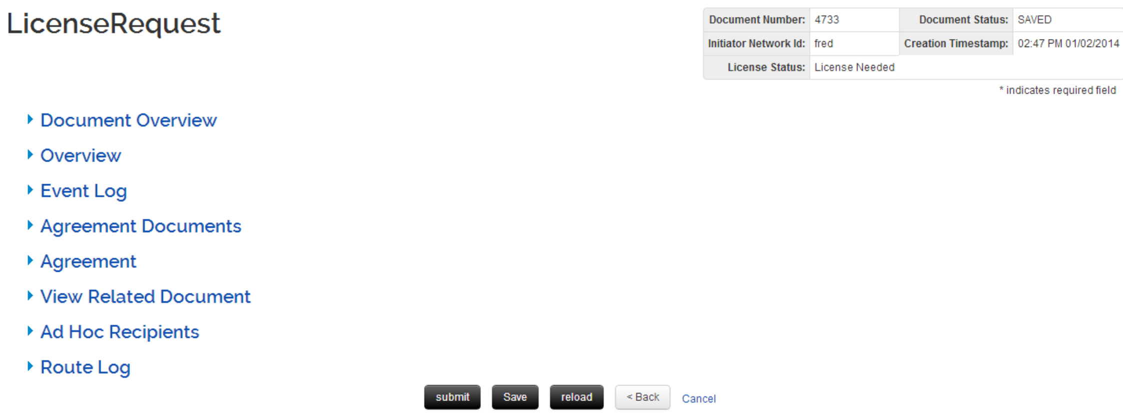
NOTE: This information applies to E-Docs and not OLE interfaces (such as loan, transfer, or bound-with). Each interface is described in the appropriate guide. Please refer to the OLE Documentation Portal.

E-Doc Screen Layout

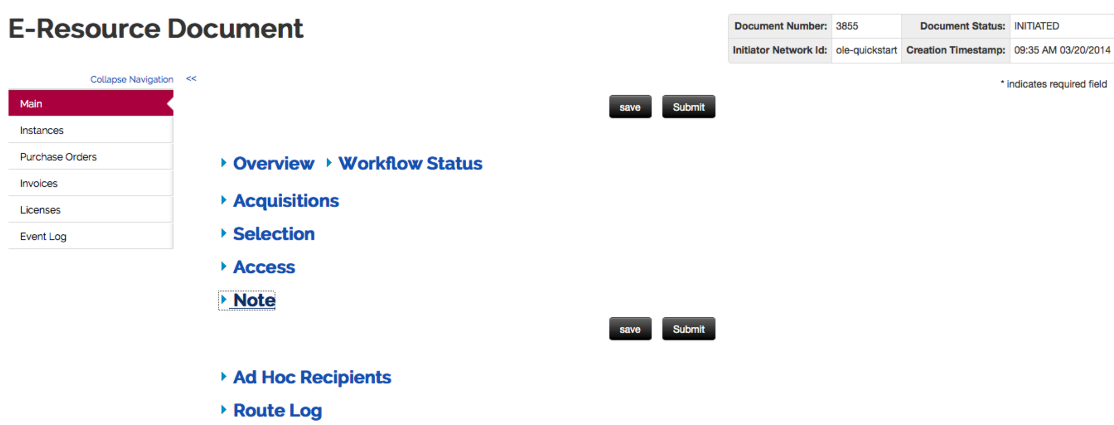
An e-doc consists of a document header and a document body. The document header in the upper right corner of the screen contains system information about the document. The document body is organized in a stack of labeled tabs that are similar to file folders. Based on the type of document, the system displays different sets of tabs. Workflow action buttons appropriate to your role are displayed at the bottom of the screen.



OLE-built documents (not inherited from KFS) have several variations even though the e-document concept remains the same. The tabs do not look like file folders, the "Show/Hide" buttons do not exist but arrows to the left of the tab titles instead, the overall design looks more modern:



Additionally, you will notice that several of the OLE screens, such as the Editors and the E-Resource Record, have left pane navigation:

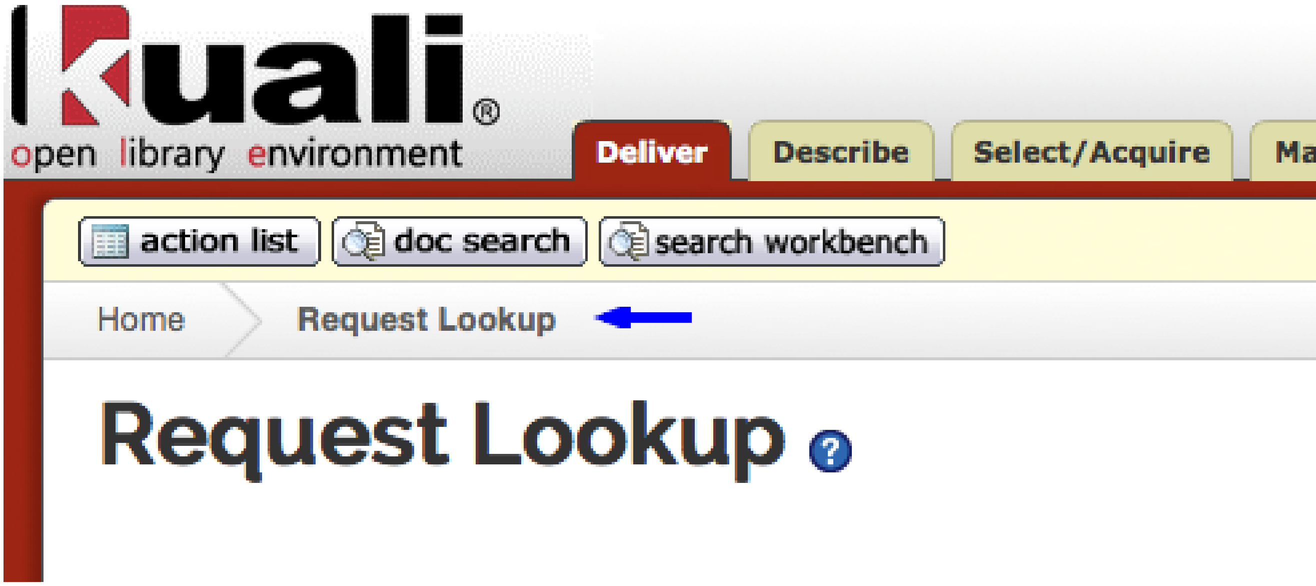


For the Editors, the left pane navigation is used to navigate between bibliographic records, Instances and E-Instances. For the E-Resource, the left pane allows for the large amount of information to be broken down into manageable pieces.

Note

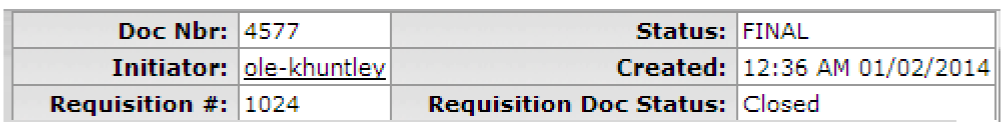
The left pane navigation on the different Editors will allow users to delete and add as well as navigate between records. For additional instructions, see Editors on the *Guide to the OLE Describe Module.*.

Breadcrumbs



In OLE-created documents, breadcrumbs are available to assist in navigation. Click **Home** to return to the OLE menu.

Document Header



Basic information in the document header

Title	Description
Document Nbr (Document Number)	The unique number used to identify each document. OLE assigns a sequential number to each document when it is created, regardless of the type of document.
Status (Document Status)	A code that identifies the status of a document within the Workflow process.
Initiator (Initiator Network ID)	The user ID of the document initiator.
Created (Creation Time Stamp)	The time and date the document was created.

Note

For information about status definitions, see Route Log.

Optional information in the document header

Title	Description
Copied from Document ID	OLE allows users to create new documents based on previous transactions by way of a copy function. When one document is copied from another, the document number of the copied document appears here.
Correct Document ID	OLE gives you the option of reversing a fully approved transaction through the use of an error correction function. When one document is a correction of another, the document number of the document being corrected appears

	here. This information is displayed only when the document was created using the error correction feature in an existing document.

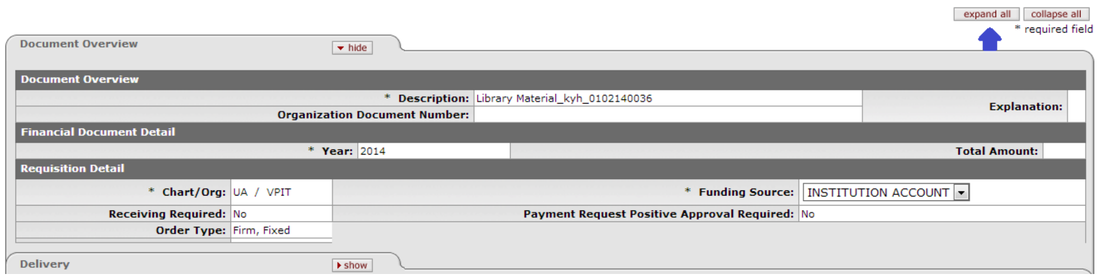
Note

Some documents have information in the header unique to that e-doc. Those are addressed in the user documentation.

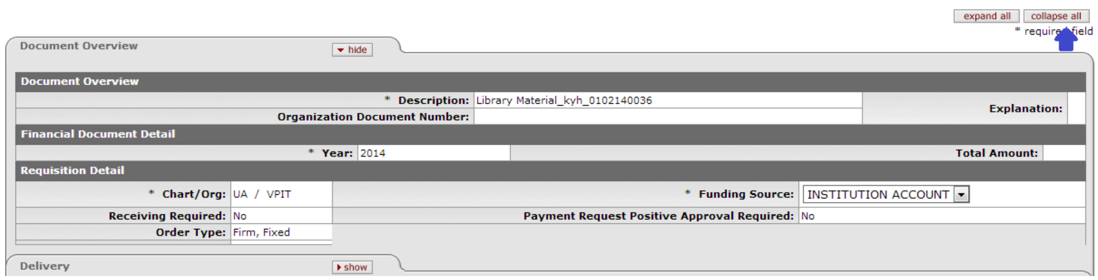
Expand All/Collapse All Buttons

You may expand or collapse all tabs in a document by clicking **expand all** or **collapse all**.

- Click expand all to expand all of the e-doc tabs.



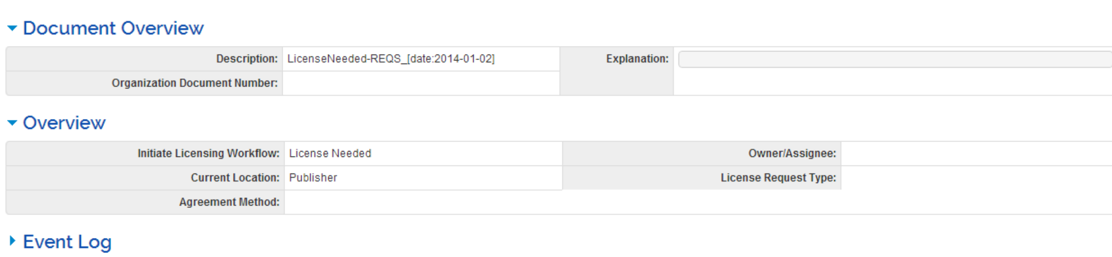
- Click collapse all to collapse all of the e-doc tabs.



Show/Hide

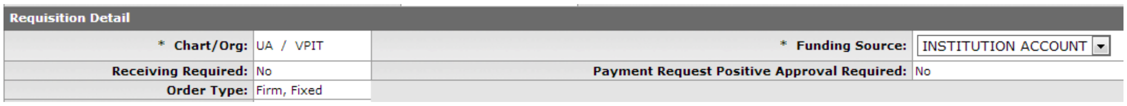
Click show or hide on tabs to expand or collapse an individual tab.

Alternatively, click the arrows on other e-docs:



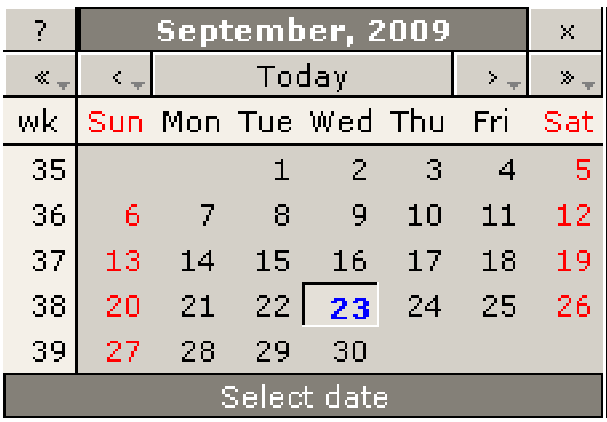
Required Fields

All required fields in an e-doc are denoted with an asterisk. You cannot submit the document until all required fields contain data.

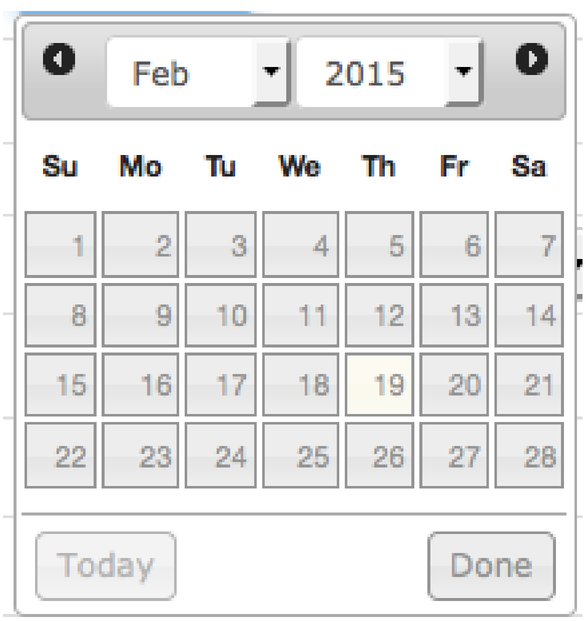


Date Fields

Dates must be specified in mm/dd/yyyy format. Alternatively, you may select a date by clicking the calendar (in OLE built documents) and selecting from the calendar that is subsequently displayed.

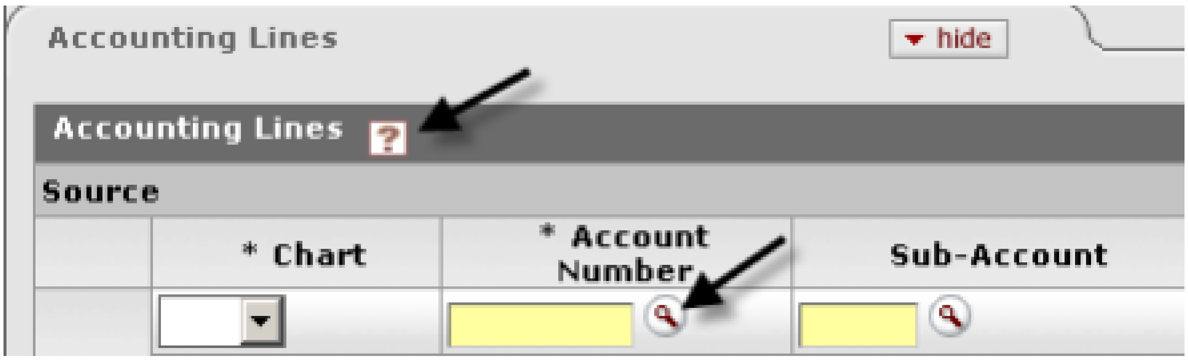


or



Standard Links and Icons

Since OLE is a web-based application, hyperlinks and icons are used for navigation. Clicking hyperlinks and icons allows you to drill down into document detail and to obtain additional information.



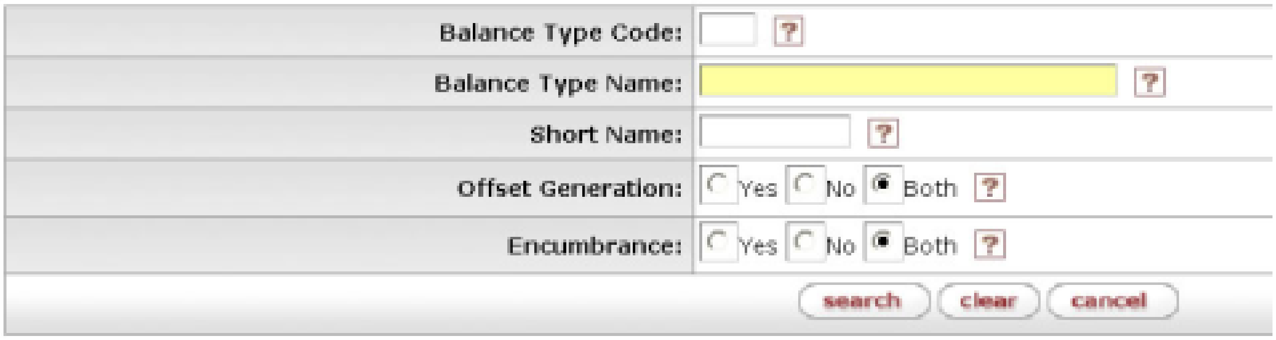
Help Icon

When you click the (or) icon by the title in the top left corner of an e-doc or other screen, the help system will display information about and instructions for working with the screen.

Field Lookup

The round magnifying glass or 'lookup' icon (or) allows you to look up reference table information so you avoid data entry errors.

After you click the icon, the system displays a list of valid values for you to select from or connects you to a form that allows you to search for the value you need.



To look up valid values in this form:

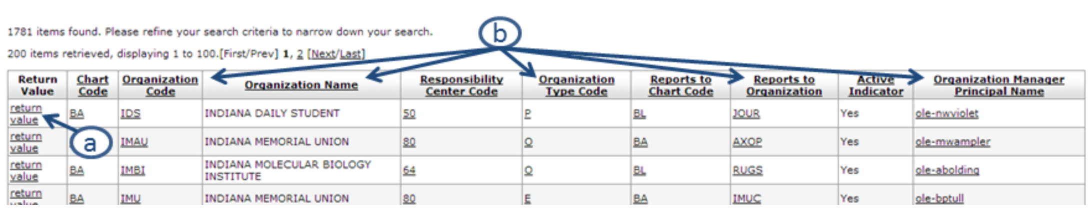
1. Enter one or more search criteria or leave all search criteria fields blank to retrieve all. To specify search criteria:

   - Type data into any combination, all, or none of the listed search fields. (Most search fields change letters to uppercase for the search.)
   - If you know the exact words or phrase, enter the text wrapped in quotes.
   - Use * only at the end of a word and only when you have entered a single word in the field
   - If desired, to enter a range of numbers or dates, use any of these range operators: >, <, >=, <=, and ..Note that the .. operator may be used only between two date values. It may not be used with a single date. All other operators are used before single dates.
   - Specify dates in the format mm/dd/yyyy. Using logical operators & (AND) and | (OR) with multiple search parameters.

2. Click .

   OLE displays the list of applicable values that you have requested. After the value list is displayed, you may take one of the following actions by clicking the hyperlinks labeled a and b below.

   In KFS-inherited screens:

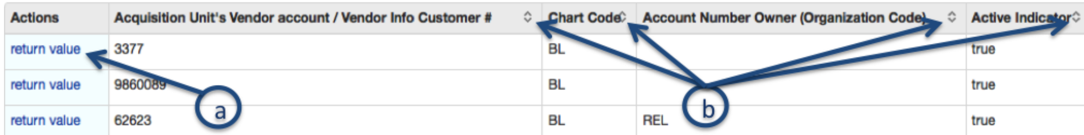


1781 items found. Please refine your search criteria to narrow down your search.

200 items retrieved, displaying 1 to 100.[First/Prev] 1, 2 [Next/Last]

Return Value	Chart Code	Organization Code	Organization Name	Responsibility Center Code	Organization Type Code	Reports to Chart Code	Reports to Organization	Active Indicator	Organization Manager Principal Name
return value	BA	IDS	INDIANA DAILY STUDENT	50	P	BL	JOUR	Yes	ole-nwviolet
return value		IMAU	INDIANA MEMORIAL UNION	80	O	BA	AXOP	Yes	ole-mwampler
return value	BA	IMBI	INDIANA MOLECULAR BIOLOGY INSTITUTE	64	O	BL	RUGS	Yes	ole-abolding
return value	BA	IMU	INDIANA MEMORIAL UNION	80	E	BA	IMUC	Yes	ole-bptull

In OLE-built screens a new pop-up window appears. Lookup result lists appear like this:

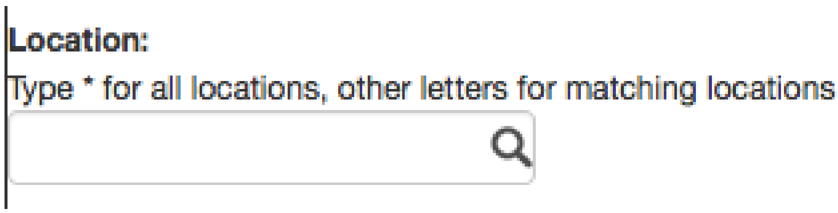


Actions	Acquisition Unit's Vendor account / Vendor Info Customer #	Chart Code	Account Number Owner (Organization Code)	Active Indicator
return value	3377	BL		true
return value	9860089	BL		true
return value	62623	BL	REL	true

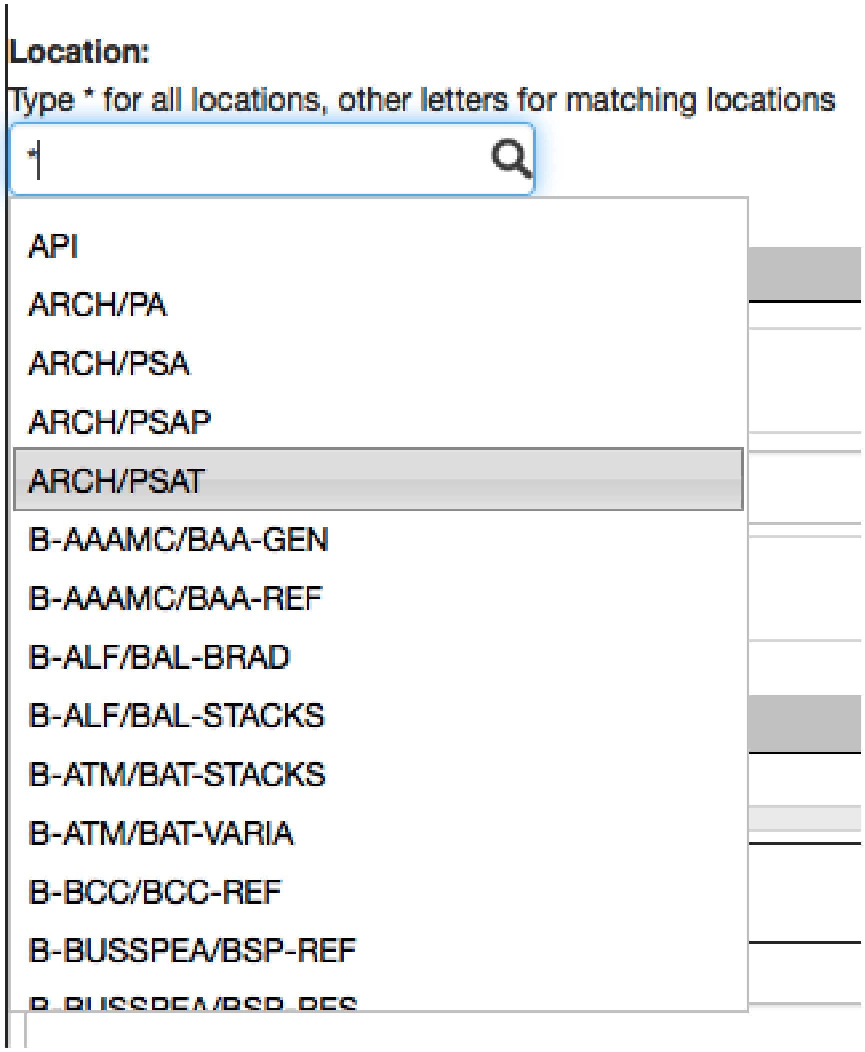
(a) Click **return value** to select the code.

(b) Click the name of a column, or the arrows, to sort the retrieved values by that column.

Autocomplete Fields



When the lookup  appears within the text box, this means it is an autocomplete field. Begin typing your data and a dropdown will appear to suggest data to enter. You may also type "*" (the asterisk key) to view all options.



Multiple Value Lookup

In global Chart of Account e-docs, documents requiring a list of values come with a special multiple value lookup screen where you may select multiple values from the search list. The **Look Up / Add Multiple xxx Lines** (where xxx is the name of the attributes you are updating) link is available in the applicable section of the tab where this feature is available.

The **Look Up / Add Multiple xxx Lines** takes you to a special search screen where you are given an opportunity to build a list of values from which you may choose one or more values by selecting the check boxes in the rightmost column.

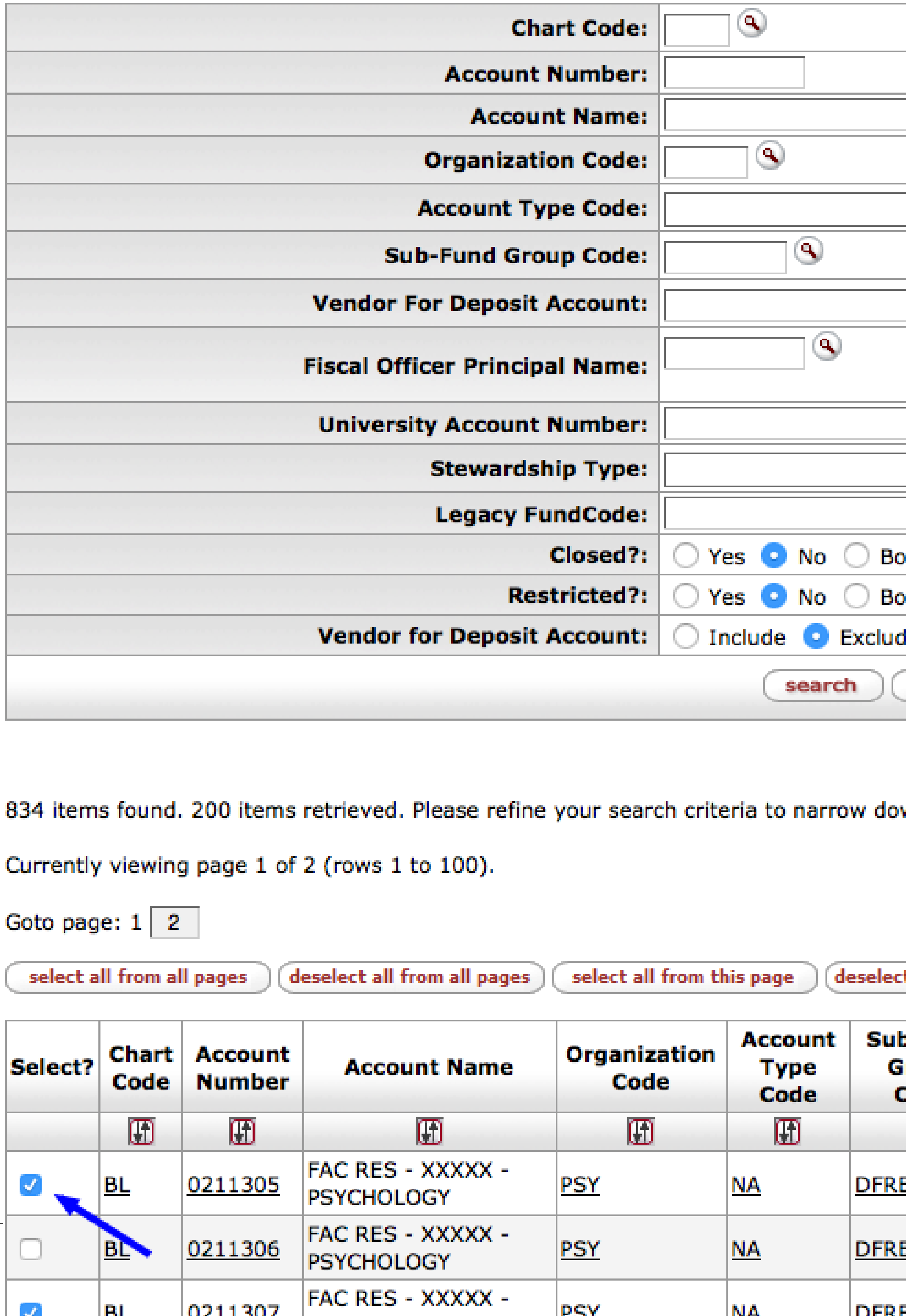
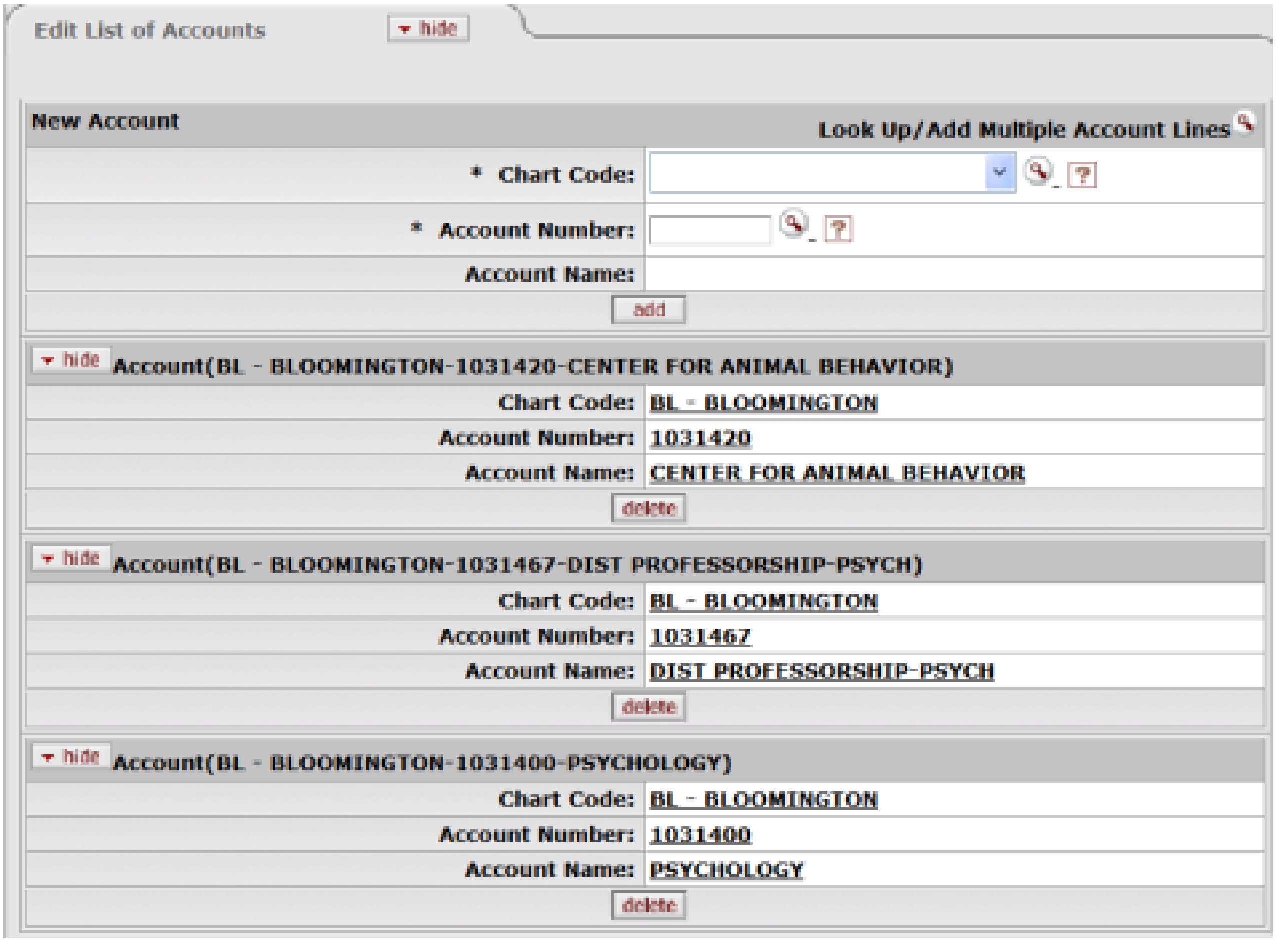


Chart Code:
Account Number:
Account Name:
Organization Code:
Account Type Code:
Sub-Fund Group Code:
Vendor For Deposit Account:
Fiscal Officer Principal Name:
University Account Number:
Stewardship Type:
Legacy FundCode:
Closed?: Yes No
Restricted?: Yes No
Vendor for Deposit Account: Include
search
834 items found. 200 items retrieved. Please refine your search criteria to narrow
Currently viewing page 1 of 2 (rows 1 to 100).
Goto page: 1 2
select all from all pages
deselect all from all pages
select all from this page
Select?
Chart Code
Account Number
Account Name
Organization Code
Account Type Code
BL
0211305
FAC RES - XXXXX - PSYCHOLOGY
PSY
NA
BL
0211306
FAC RES - XXXXX - PSYCHOLOGY
PSY
NA
FAC RES - XXXXX -

- Click a **select all** option to select all values in the list or on the page.
- Click a **deselect all** option to clear the check boxes for all values in the list or on the page.



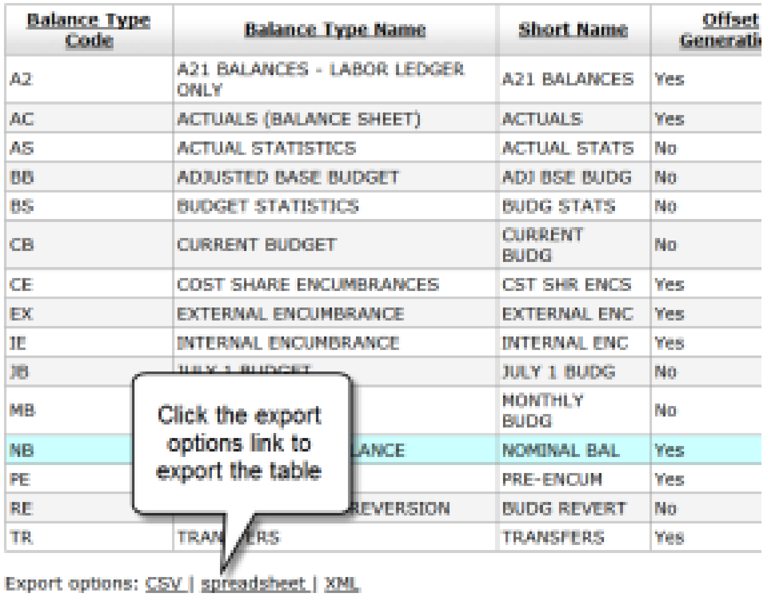
Clicking 

returns you to the tab you came from without populating the tab.

Export Options Links

In the KFS-inherited e-docs, to export the result of the table lookup to your local computer in CSV, Excel, or XML format:

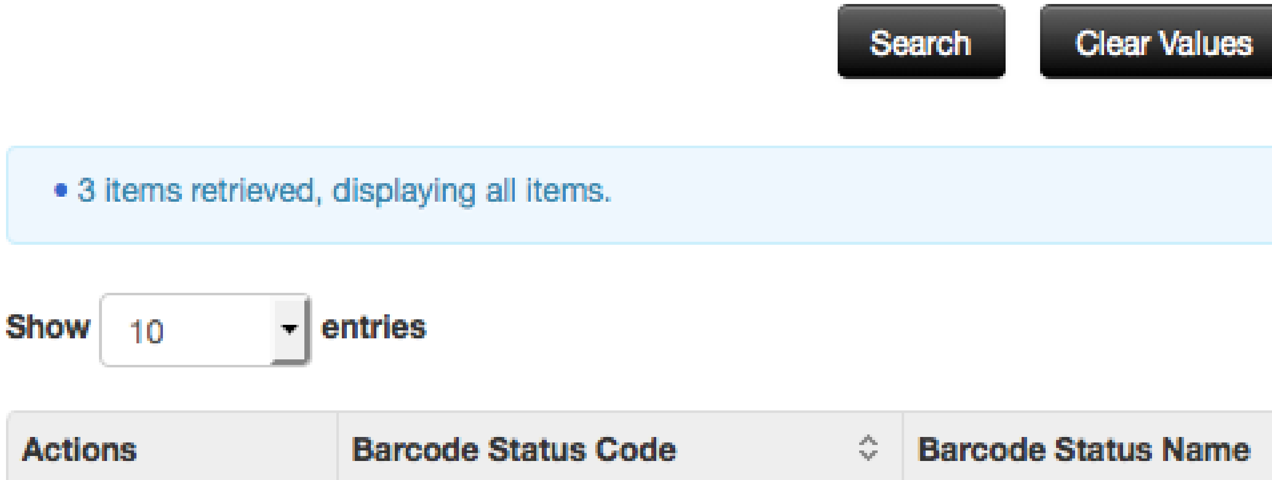
1. Click the **export option** link for the format you want.



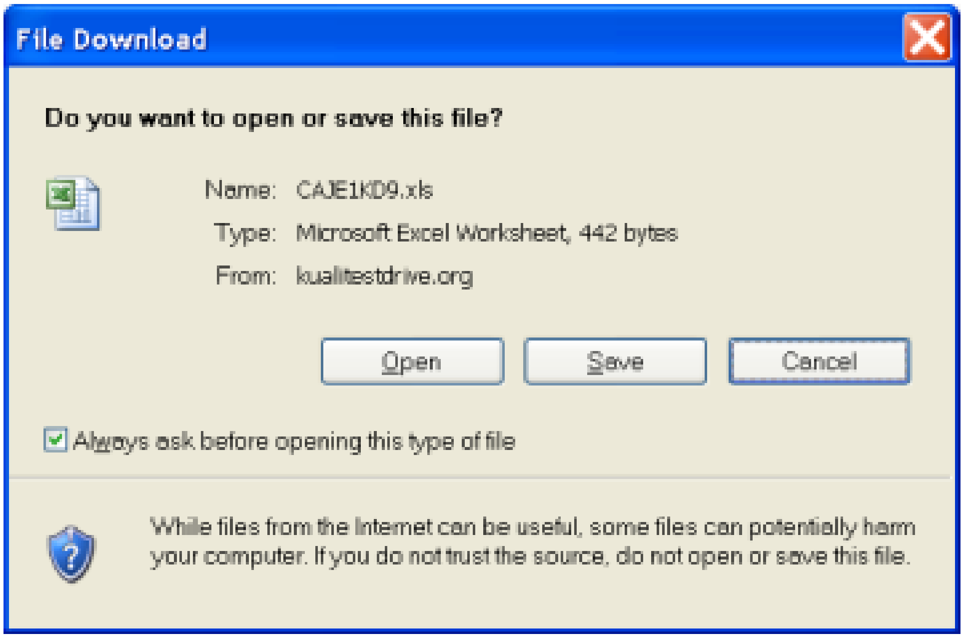
Balance Type Code	Balance Type Name	Short Name	Offset Generati
A2	A21 BALANCES - LABOR LEDGER ONLY	A21 BALANCES	Yes
AC	ACTUALS (BALANCE SHEET)	ACTUALS	Yes
AS	ACTUAL STATISTICS	ACTUAL STATS	No
BB	ADJUSTED BASE BUDGET	ADJ BSE BUDG	No
BS	BUDGET STATISTICS	BUDG STATS	No
CB	CURRENT BUDGET	CURRENT BUDG	No
CE	COST SHARE ENCUMBRANCES	CST SHR ENCS	Yes
EX	EXTERNAL ENCUMBRANCE	EXTERNAL ENC	Yes
IE	INTERNAL ENCUMBRANCE	INTERNAL ENC	Yes
JB	JULY 1 BUDGET	JULY 1 BUDG	No
MB		MONTHLY BUDG	No
NB	ANCE	NOMINAL BAL	Yes
PE		PRE-ENCUM	Yes
RE	REVERSION	BUDG REVERT	No
TR	TRAN ERS	TRANSFERS	Yes

Export options: CSV | spreadsheet | XML

On OLE-created documents, the same options are available above the results list.



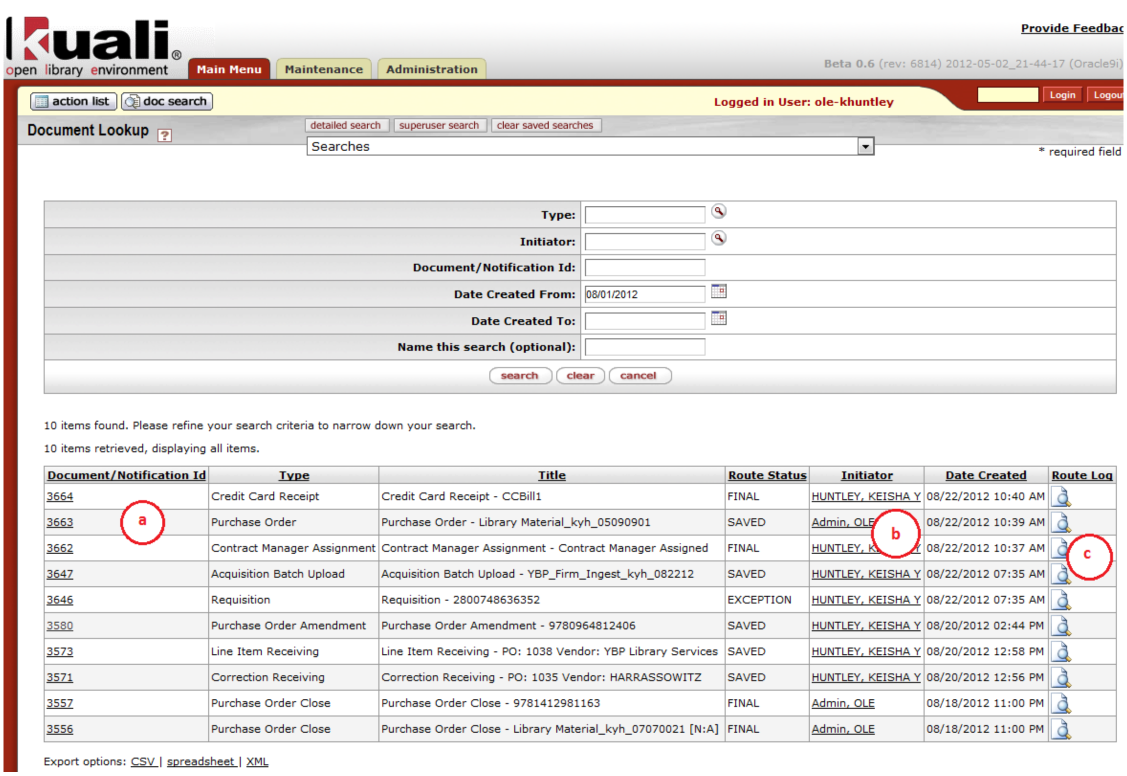
The system prompts you to click **Open**, **Save,** or **Cancel**.



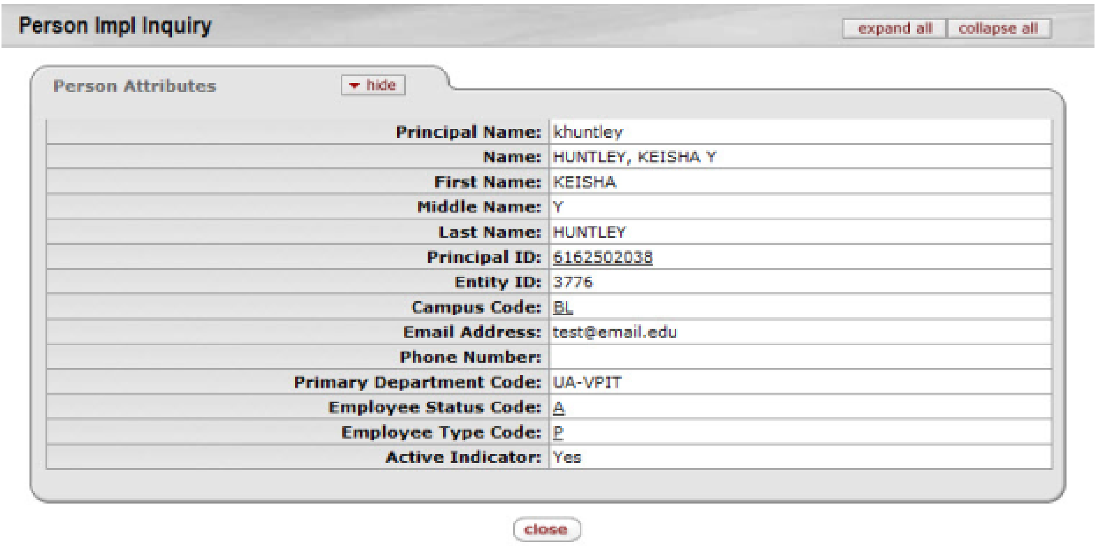
2. Click one of the buttons and follow the standard prompts.

Drill downs

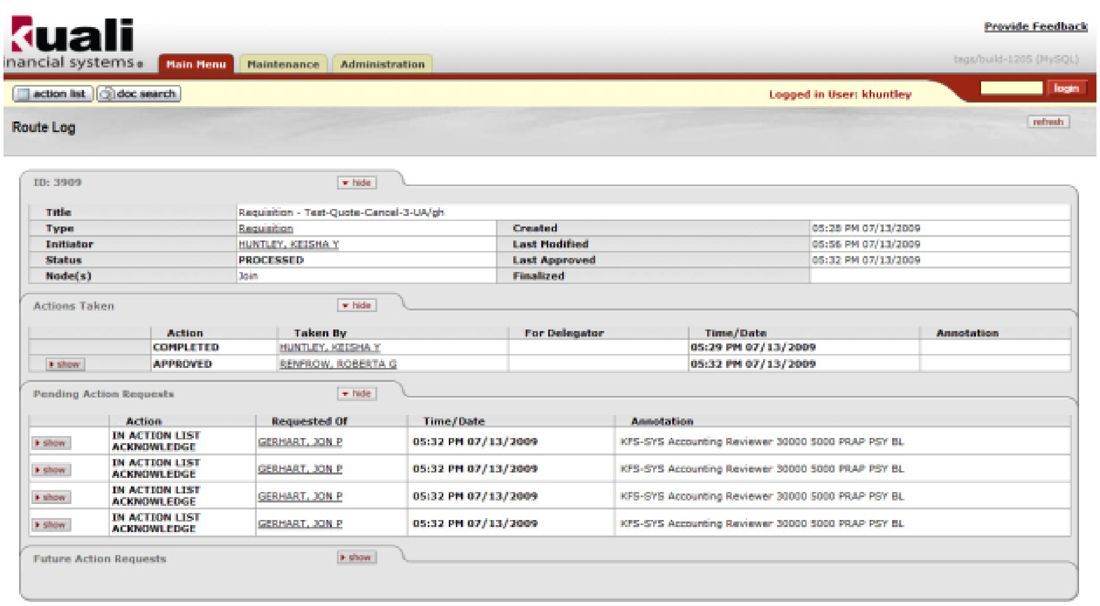
After you perform a search in KFS-inherited, financial documents, the system displays a link or icon in the list of retrieved data. You can 'drill down into' (that is, display) details for any of the linked items. Standard drill down features in OLE include the following.



- Document ID drill down: **(a)** Clicking the Document ID link retrieves the specified document so you can view or edit it.
- User drill down: **(b)** Clicking a linked user ID takes you to a Person Impl Inquiry report.



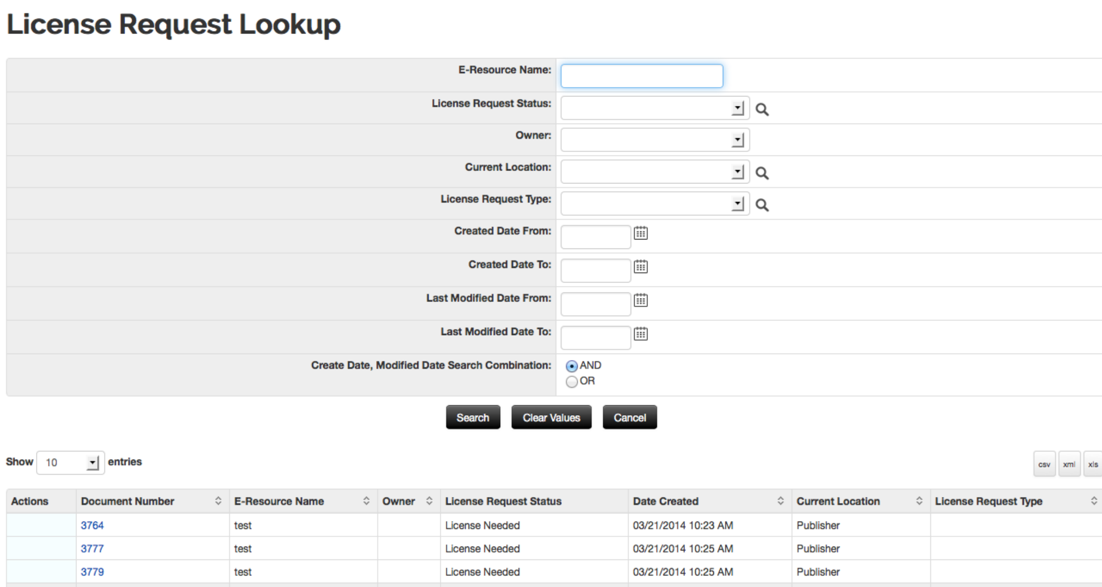
- Route log lookup: **(c)** Clicking the **Route Log** icon  takes you to the OLE Route Log for the document in this row. The Route Log contains two tabs summarizing routing activities. The **Action Taken** tab logs prior events and the **Pending Action Requests** tab logs known future events, from which you can see current Workflow action requests.



Note

For more information, see Route Log

To augment library workflows, search results are not as standard in the OLE-build documents. However from the search results listed there are links in blue to drill down into.

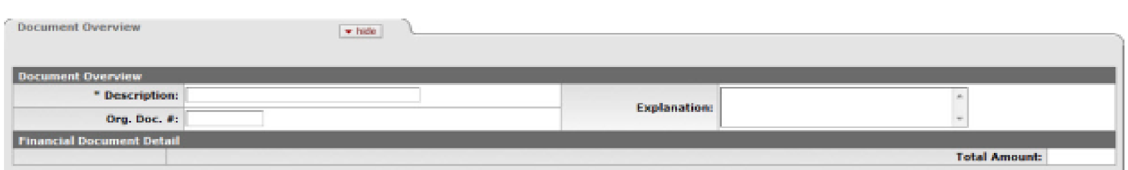


Standard Tabs

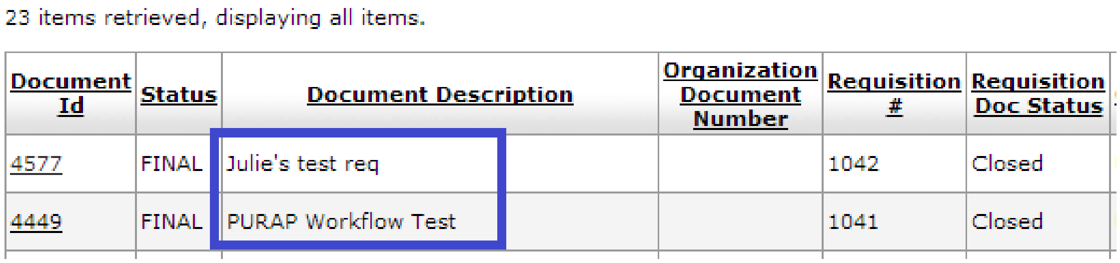
While the tabs contained in various e-docs vary from one document type to another, a set of standard tabs is included in every e-doc. All documents contain **Document Overview**, **Notes and Attachments**, **Ad Hoc Recipients**, and **Route Log** tabs. Additionally, financial transactions e-docs contain the **Accounting Lines** tab and the **General Ledger Pending Entries** tab.

Document Overview

The **Document Overview** tab identifies the document and includes fours fields—**Description**, **Explanation**, **Org. Doc** # and **Total Amount** (total amount only exists on financial documents only).

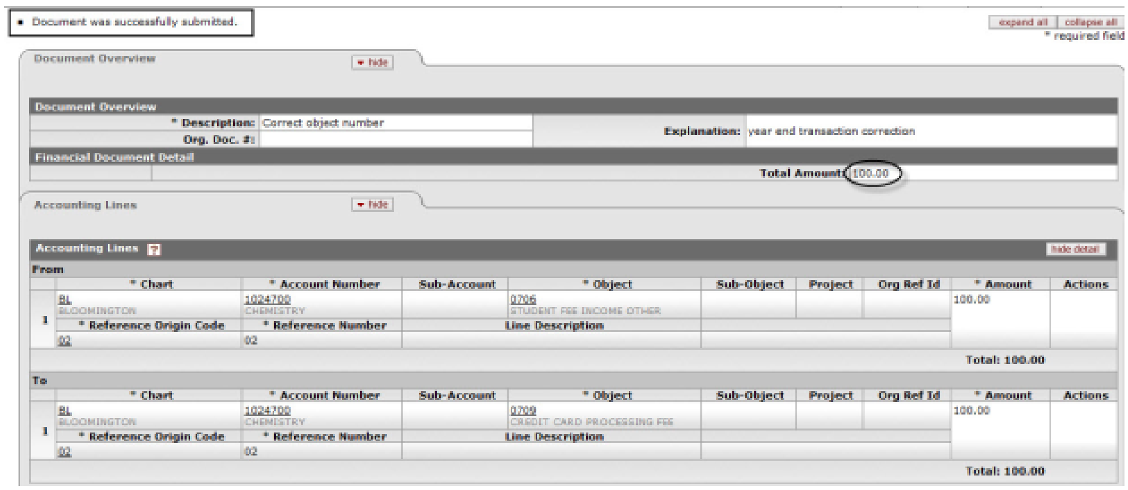


The **Description** field is a required field on every e-doc because it is used to identify the transaction and is included in the GL inquiry, standard reports, action list, and document search. Some documents, such as the Requisition, will have the **Description** field pre-populated.


23 items retrieved, displaying all items.

Document Id	Status	Document Description	Organization Document Number	Requisition #	Requisition Doc Status
4577	FINAL	Julie's test req		1042	Closed
4449	FINAL	PURAP Workflow Test		1041	Closed

The **Explanation** and **Org Doc#** fields allow you to include additional information about the document. For those in which it applies, the **Total Amount** field is updated when the document is submitted successfully.



Document Overview Tab Definitions

Title	Description
Description	Required. Enter the short description for the document. The description appears in the GL Inquiry (for financial documents), standard reports, action list and document search as a primary identification of the document.
Explanation	Optional. Enter a more detailed explanation than the information supplied in the description field.
Total Amount	Display-only on financial documents. Displays the total amount of accounting lines when the document is submitted successfully.
Org. Doc. #	Optional. Enter the value that may include departmental or organizational information. This number is not the same as the Document Number assigned by OLE.

Note

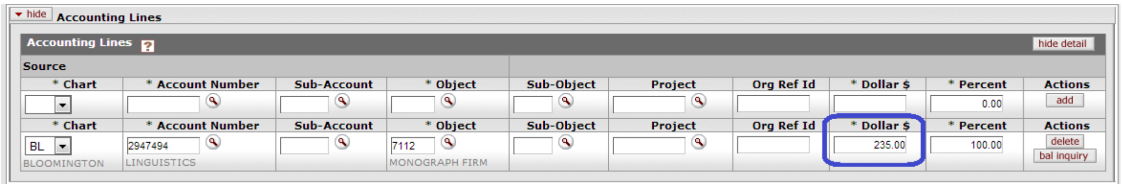
Other data fields may be available in the document overview of specific documents.

OLE Financial Documents Accounting Lines Tab

Accounting information for a financial transaction is entered in the **Accounting Lines** tab. This is where the accounting string data is entered. The required fields and the format of the tab vary slightly by document type. The **Dollar** or **Amount** field may also look different, depending on the type of document you are creating.

Single-Sided Entry

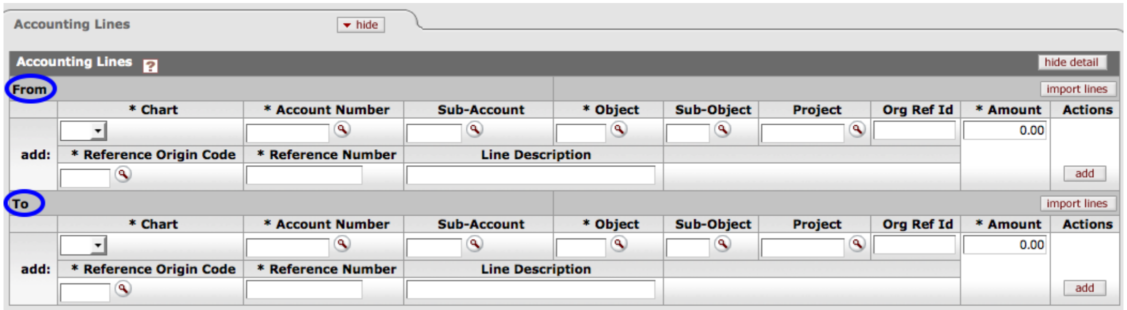
A number of documents require you to enter information onto only one side of the transaction because the balancing side of the transaction is automatically generated by OLE based on pre-set business rules. An example of a single-sided entry is the Purchase Order Accounting Lines.



Double-Sided Entry

Several types of documents function by placing accounts, object codes, and amount combinations in separate sections of the **Accounting Lines** tab. In a document with **From/To** sections (such as the General Error Correction or GEC document), the **From** section of the transaction represents a decrease in income, expense, or budget to an account. For example, when an account is entered in the **From** section of a GEC document and the object code is an expense type, the transaction reduces (credits) the expense and increases (debits) cash for that account.

The **To** section of this same type of transaction represents an increase in income, expense, or budget to an account. For example, when an account is entered in the **To** section of a GEC document and the object code is an expense type, the transaction increases (debits) the expense and decreases (credits) cash for this account.



Accounting Lines Tab Definitions

Title	Description
Chart	Required. Select the chart code from the **Chart** list.
Account	Required. Enter the account number or search for it from the **Account** lookup.
Sub-Account	Optional. Enter the sub-account number or search for it from the **Sub-Account** lookup.
Object	Required. Enter the object code or search for it from the **Object Code** lookup.
Sub-Object	Optional. Enter the sub-object code or search for it from the **Sub-Object** lookup.

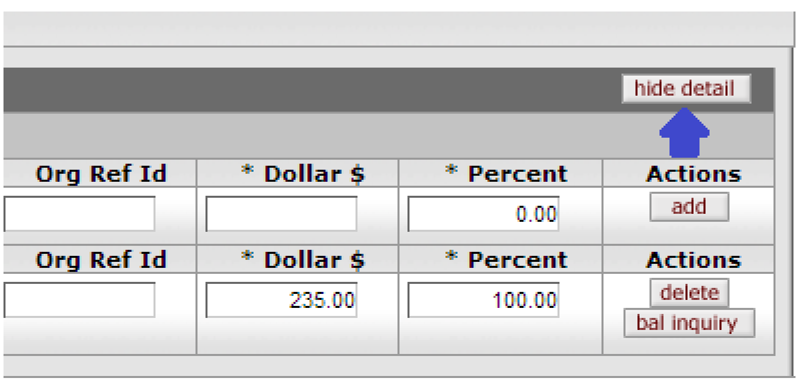
Project	Optional. Enter the project code or search for it from the **Project** lookup .
Object Type	Required only for the Journal Voucher document. Enter the object type code or search for it from the **Object Type** lookup . This value is auto-populated based on the object code used in the JV document when you click **add**.
Organization Reference	Optional. Enter the appropriate data for the transactions.
Amount (Or Dollar in some documents)	Required. Enter the amount.
Ref Origin Code	Required only for the General Error Correction document. Enter the ref origin code or search for it from the **Origination Code** lookup .
Ref Number	Required only for the General Error Correction document. Enter the ref number.
Line Desc	Optional in most documents. Enter a description of the transaction line. This field is required in a few documents and is noted as required in the help documentation for these types of documents.

Note

Some of the above fields are not included in all documents. Specific requirements for each document type are noted in the section for the document type.

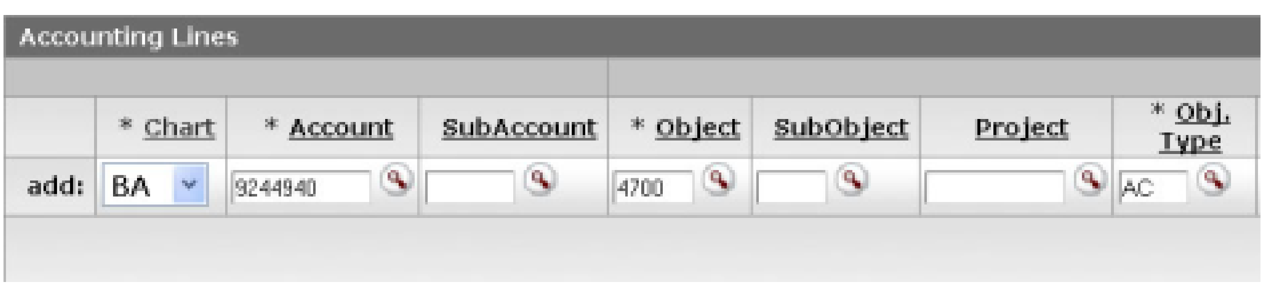
Displaying Account Details

Descriptions for the accounting string data may be hidden or shown by clicking **show detail** and **hide detail**.

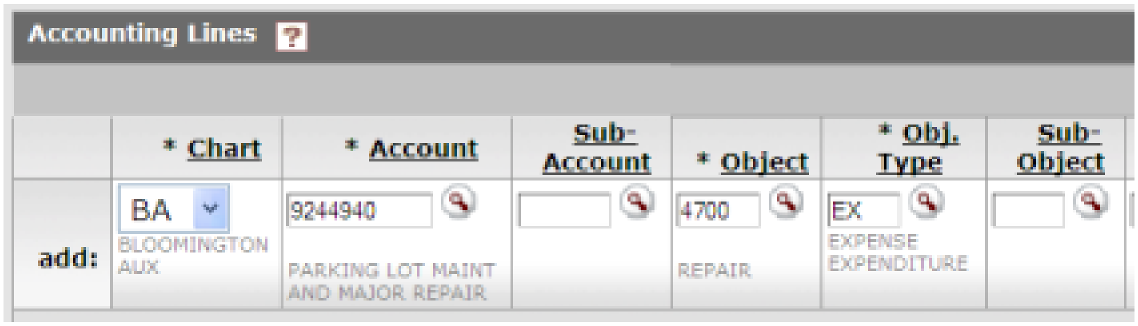


- Clicking 

hides the COA titles in the **Accounting Lines** tab:



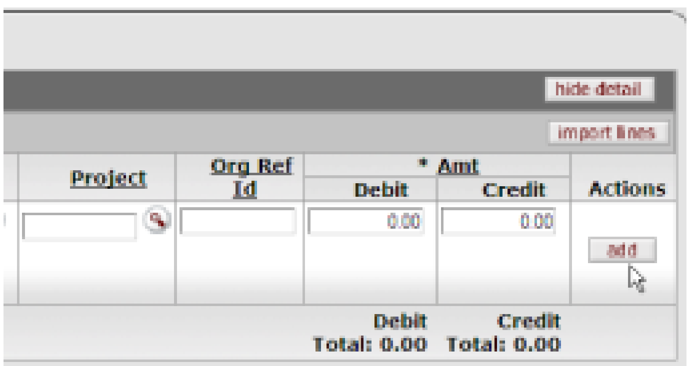
- Clicking show detail displays the COA titles in the **Accounting Lines** tab:



Accounting Lines Buttons

The accounting lines buttons offer the following options.

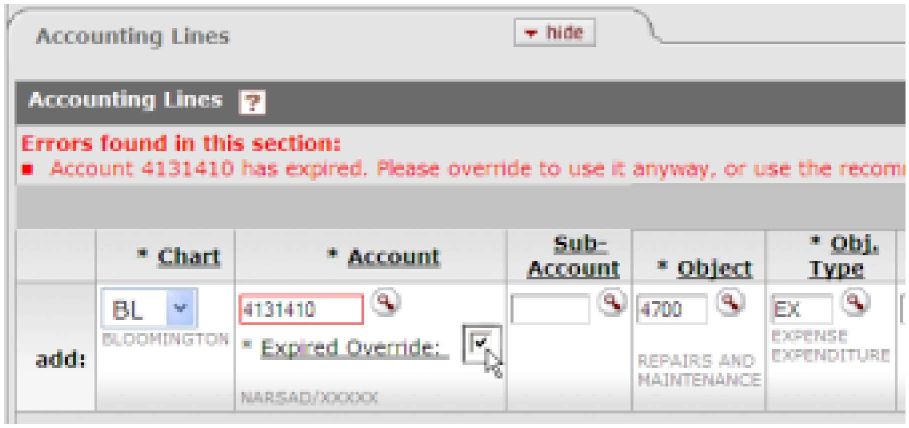
- To add an accounting line to the document, click add



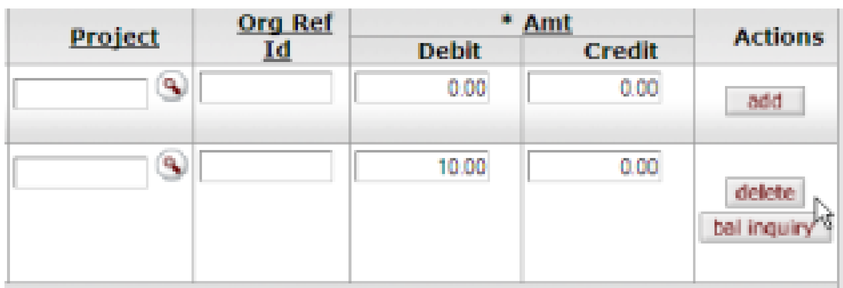
The system validates the account number, expiration status and business rules specific to the document type.

Note

If the account number is expired, you must check the **Expired Override** box or enter a different account in order to add the line.



- To delete the accounting line, click delete.



- To open the balance inquiry menu, click bal inquiry. Then select one of the reports by clicking the lookup icon next to the desired report title. .

Import Lines

If you have a number of accounting lines to enter, you may create a .csv file containing the transactions and import it into the document.

Note

For information about accessing and using the import templates, see Importing Data Into OLE.

Restrictions

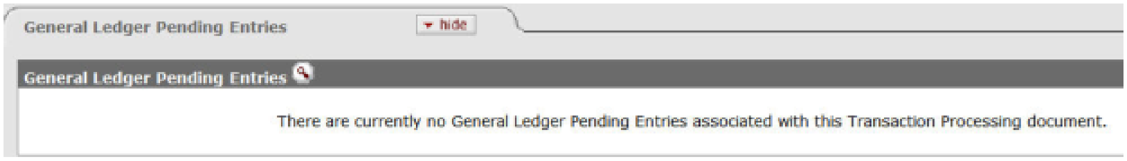
Each financial transaction document is governed by business rules for the document type and the accounting line data. Rules may be derived from specific attributes associated with the account, object code, or other accounting string data. The following is a partial list of account and object code attributes that may cause restrictions on various documents.

Attributes that may cause restrictions in entering accounting lines

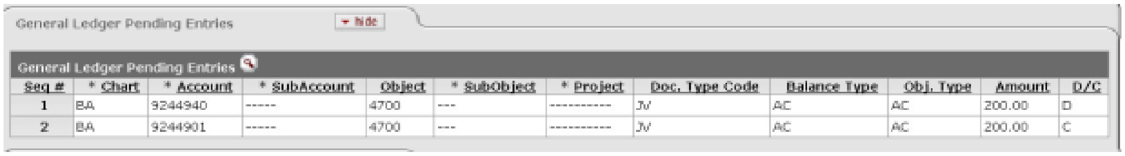
Attribute	Cross Edit
Account	Fund Group, Sub-Fund Group, Budget Recording Level, Effective/ Expiration Date, Account Sufficient Funds, Object Presence Control, Income Stream Account
Object Code	Object Type, Object Sub-Type, Object Level, Consolidated Object Code

General Ledger Pending Entries Tab

After a financial transaction document has been submitted, the **General Ledger Pending Entries** tab displays the actual entries that are to be posted to the GL when the document is fully approved and the GL batch process has run. In addition to the entries the user created, the **General Ledger Pending Entries** tab may include system-generated offset transactions. Before you submit the document, this tab contains the message 'There are currently no General Ledger Pending Entries associated with the Transaction Processing document'.

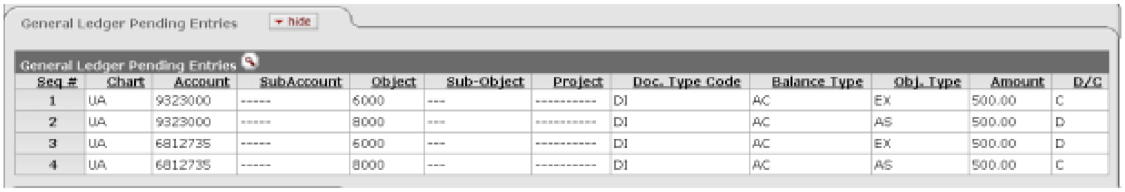


When the document is submitted into routing for approval, the pending entries are displayed in the **General Ledger Pending Entries** tab. After a transaction is fully approved, these entries are posted in a batch process to the General Ledger. After the batch process has been run, the general ledger pending entries are moved from this tab of the document.



General Ledger Pending Entries

Seq #	* Chart	* Account	* SubAccount	Object	* SubObject	* Project	Doc. Type Code	Balance Type	Obj. Type	Amount	D/C
1	BA	9244940	-----	4700	---	----------	JV	AC	AC	200.00	D
2	BA	9244901	-----	4700	---	----------	JV	AC	AC	200.00	C



General Ledger Pending Entries

Seq #	Chart	Account	SubAccount	Object	Sub-Object	Project	Doc. Type Code	Balance Type	Obj. Type	Amount	D/C
1	UA	9323000	-----	6000	---	----------	DI	AC	EX	500.00	C
2	UA	9323000	-----	8000	---	----------	DI	AC	AS	500.00	D
3	UA	6812735	-----	6000	---	----------	DI	AC	EX	500.00	D
4	UA	6812735	-----	8000	---	----------	DI	AC	AS	500.00	C

Balancing Rules

Each financial e-doc is governed by a set of balancing rules, some of which are more complex than others. The balancing rules within a document often enforce the basic rule that debits must equal credits. Whether or not an accounting line generates a debit or credit relies on various factors, including which side of a double-sided document it is in and whether the object code used represents income, expense, assets, or liabilities, etc.

Note

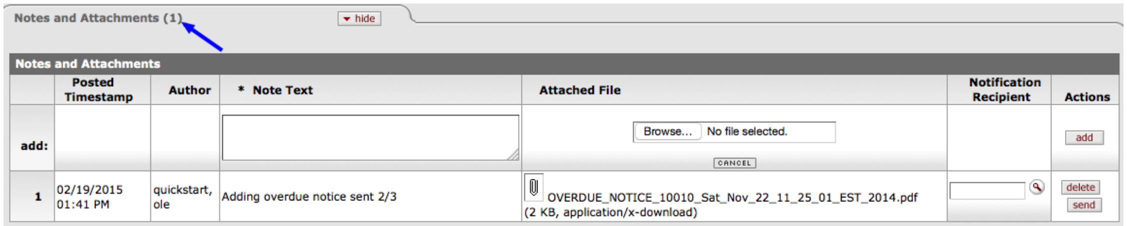
The Accounting Lines total in some documents may balance to sections in the document or to entries in the tabs on the document. For example, the Cash Receipt document's **Accounting Lines** tab balances to the **Reconciliation** section of the document.

Notes and Attachments Tab

Note

Size and File Type Restrictions for Attachments: The maximum size of attachments is 5 megabytes by default, but your institution may change that limit. The system imposes no restrictions on types of files that may be attached.

The **Notes and Attachments** tab displays user notes, attachments, or system-generated information about the document. The number of notes and/or attachments is indicated on the tab.



Notes and Attachments Tab Definitions

Title	Description
Posted Timestamp (Posted Date/Time Stamp)	Display-only. The time and date when the attachment or note was posted.
Author (Principal Name)	Display-only. The full name of the user who has added the notes or attachments.
Note Text	Required. Enter comments.
Attached File	Optional. Select the file to attach by clicking **Browse** and using the standard **Choose File** dialog box. Click **Cancel** to clear the file name you have selected.

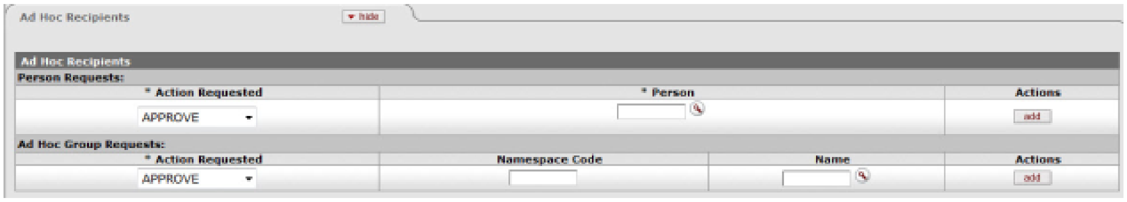
Note

Other data fields may be available in the Notes and Attachments tabs of specific documents.

Click  to add a note.

Ad Hoc Recipients Tab

The **Ad Hoc Recipients** tab allows you to interrupt the normal workflow routing of the document and include individuals or groups in the routing path. Ad hoc routing does not supersede the normal workflow routing of the document but is in addition to the normal routing. The **Ad Hoc Recipients** tab has two sections: **Person Requests** and **Ad Hoc Group Requests**. Use one or both of the sections to route the document to a person, group, or both.



Ad Hoc Recipients Tab Definitions

Title	Description
Action Requested	Required. Select the desired action from the **Action Requested** list. The choices are **APPROVE**, **ACKNOWLEDGE**, and **FYI**.
Person	Required when routing the document to an individual. Enter a user ID or select it from the lookup.
Ad Hoc Group Requested	Required when routing the document to a group. Enter a group name or select it from the lookup.

Click add in the **Actions** column to add the current line.

Click delete in the **Actions** column to delete the current line.

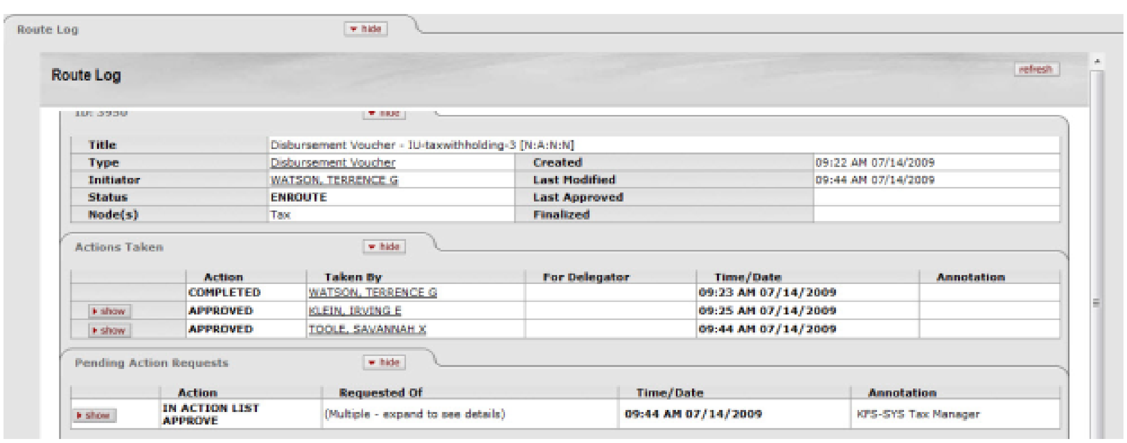
Note

For more information about ad hoc routing, see Ad Hoc Routing.

Route Log Tab

Most financial documents require one or more approvals before they impact the General Ledger. The process usually begins with Workflow identifying all account numbers used on the document and requesting the approval of the fiscal officers associated with these accounts. The applicable routing information for each e-doc can be found in its **Route Log** tab.

OLE-built, library documents can be routed also. This allows for audit trail functionality.



Note

For more information about the Route Log, see Route Log.

Basic E-Doc Operations

This section describes basic e-doc operations that you perform on many different types of documents.

Initiating a Document

1. Select the document link from the correct menu tab (Deliver, Describe, Select/Acquire).
2. Complete required tabs for the document.

   ### Note

   For information about the requirements for a particular type of e-doc, see the help documentation for the specific document type in the OLE Document Portal.

3. Click 

to route the document for approval.

Copying a Document

(initiating a document based on another document)

You may initiate a new document based on an existing document.

1. Retrieve the document from which you want to copy.

   ### Note

   For information about how to retrieve a document, see Using Doc Search to Find a Document.

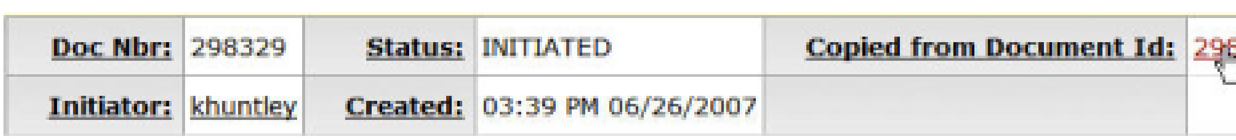
2. Click 

to route the document for approval.

   The system creates a new document with a new document ID. The document ID information for the copied-from document is displayed in the document header and also in the **Notes and Attachments** tab of the new document.

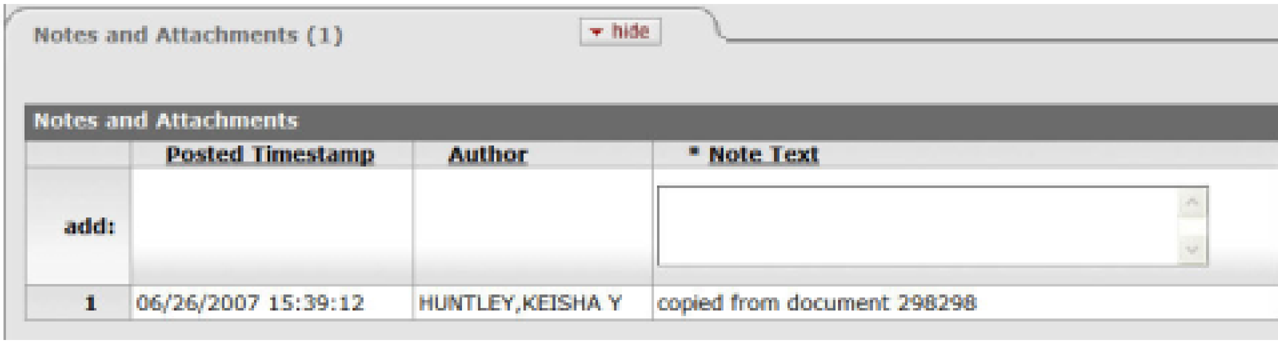
   ### Tip

   Clicking the **Copied from Document Id** takes you to the document you copied from.



Doc Nbr:	298329	Status:	INITIATED	Copied from Document Id:	29
Initiator:	khuntley	Created:	03:39 PM 06/26/2007		

   A note stating that the document was copied from another document is attached to the copied-from document.



3. Complete required tabs for the document.

4. Click submit to route the document for approval.

Note

For information about the requirements for a particular type of e-doc, see the help documentation for the specific document type. For information about routing the document, see Routing a Document.

Tip

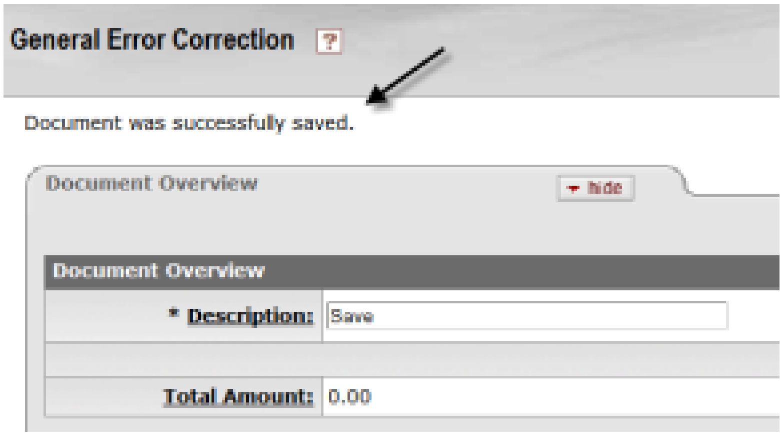
Lookup and Copy Feature for Maintenance e-docs To create a Maintenance Doc table code that is similar to one of the existing codes, click the copy link. The system creates a document with the same values, except for the values in the identifying fields. This copy feature is not available from the valid value lookup within the financial transaction documents.

Actions	Billing Campus Code	Billing Name	Billing Line 1 Address	Billing Line 2 Address	Billing City Name	Billing State Code	Billing Postal Code	Billing Country Code	Billing Phone Number	Billing Email Address	Active Indicator
edit copy	BL	THE UNIVERSITY	ACCOUNTS PAYABLE	P.O. BOX 4095	BUTTER NUT	SC	47402	US	(342) 456-2398		Yes
edit copy	CO	PURDUE UNIV. - COLUMBUS	ACCOUNTING DEPARTMENT	620 UNION DRIVE UN 443	BOSTON	TN	46202-5170	US	(862) 912-8658		Yes
edit copy	EA	UNIVERSITY EAST	ACCOUNTS PAYABLE	2325 CHESTER BOULEVARD	RICHMOND	OR	47374-1289	US	(892) 973-8392		Yes
edit copy	IN	PHYSICAL PLANT	ACCOUNTING DEPARTMENT	123 HICKS	WASHINGTON	TN	46202-5170	US	(317) 274-8658		Yes

Saving a Document

1. To save the document to work on later, click save.

2. Verify that the document was successfully saved. The system displays a message in the upper left corner.



3. Retrieve the document at a later time to continue working.

Note

For information about how to retrieve a document, see Using Doc Search to Find a Document.

Canceling a Document

Note

Documents in 'INITIATED' status that are canceled are removed from the database and cannot be retrieved or viewed.

1. To cancel a document, click  in the array of workflow action buttons.

2. When prompted, '**Are you sure you want to cancel?**' click 

Closing a Document

1. To close a document and return to the menu tab, click  in the array of workflow action buttons.

2. When prompted '**Would you like to save this document before you close it?**' click  to proceed.

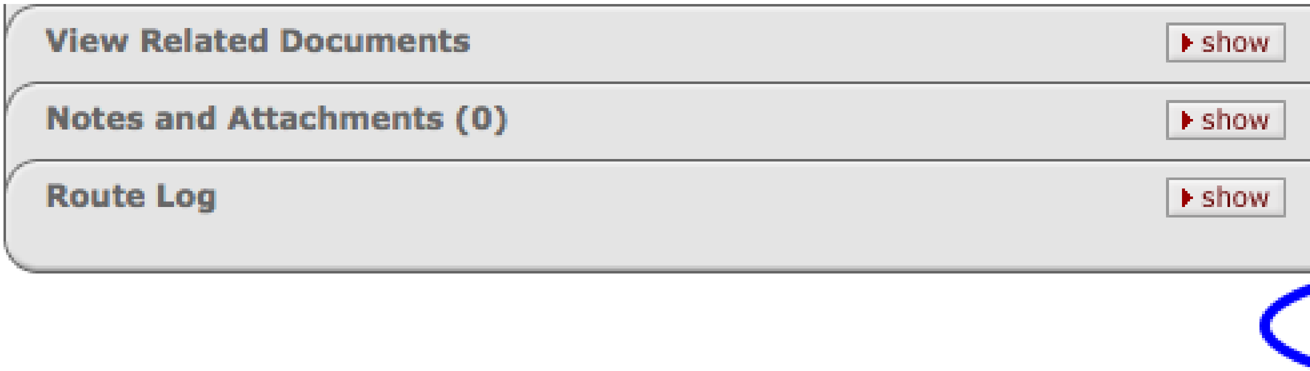
Note

Closing a document in 'INITIATED' status has the same effect as canceling the document.

Routing a Document

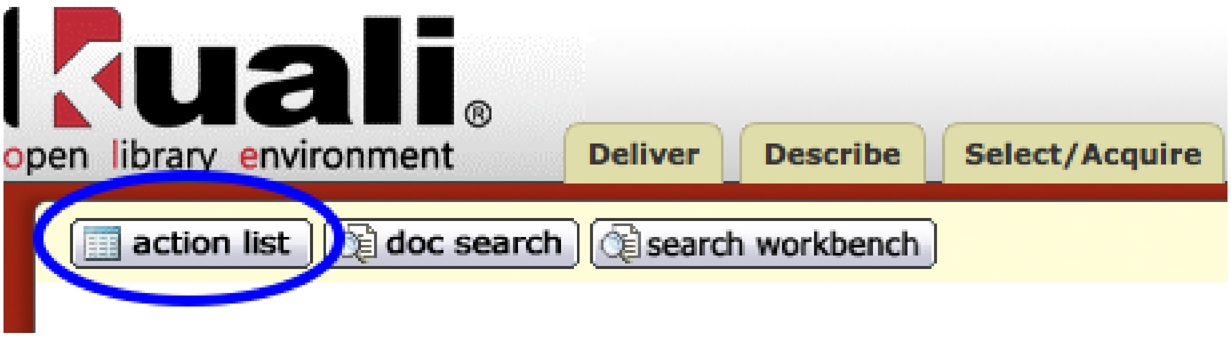
The e-doc process supports both pre-established workflow routing and ad hoc routing. In workflow routing, OLE routes the document to the proper users based on business rules established in Workflow. Ad hoc routing allows a user to route the document to one or more individual users and/or groups for approval, acknowledgment, or FYI.

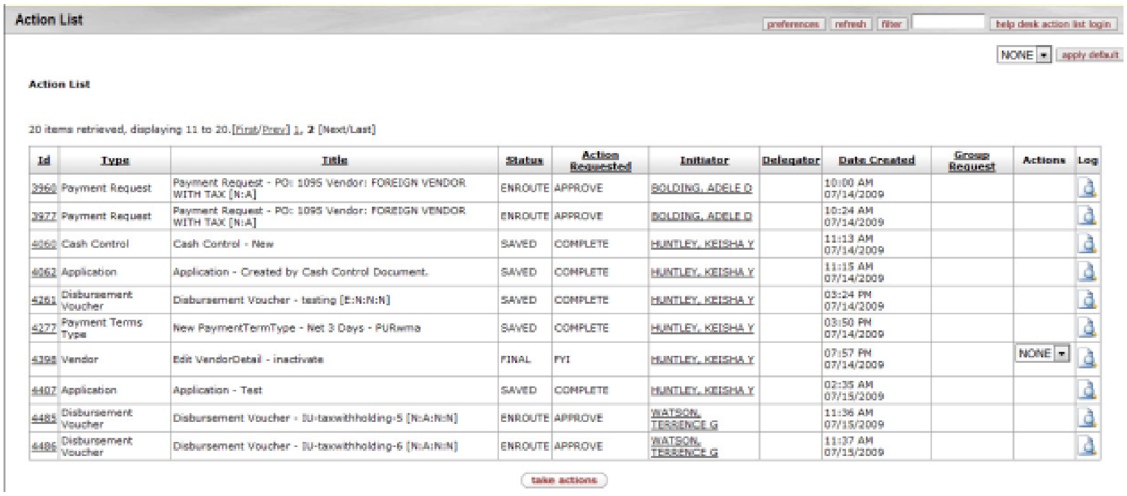
Unless you want to add an ad hoc routing, select one of the action buttons to route the document in the predefined routing hierarchy.



Using the Action List

The **action list** button is located in the upper left corner of the screen allows you to view and act on documents that require your completion, acknowledgment, approval, and FYI.




Action List

preferences refresh filter help desk action list login

NONE apply default

Action List

20 items retrieved, displaying 11 to 20.[First/Prev] 1, 2 [Next/Last]

Id	Type	Title	Status	Action Requested	Initiator	Delegator	Date Created	Group Request	Actions	Log
3960	Payment Request	Payment Request - PO: 1095 Vendor: FOREIGN VENDOR WITH TAX [N:A]	ENROUTE	APPROVE	BOLDING, ADELE D		10:00 AM 07/14/2009			
3977	Payment Request	Payment Request - PO: 1095 Vendor: FOREIGN VENDOR WITH TAX [N:A]	ENROUTE	APPROVE	BOLDING, ADELE D		10:24 AM 07/14/2009			
4060	Cash Control	Cash Control - New	SAVED	COMPLETE	HUNTLEY, KEISHA Y		11:13 AM 07/14/2009			
4062	Application	Application - Created by Cash Control Document.	SAVED	COMPLETE	HUNTLEY, KEISHA Y		11:15 AM 07/14/2009			
4261	Disbursement Voucher	Disbursement Voucher - testing [E:N:N:N]	SAVED	COMPLETE	HUNTLEY, KEISHA Y		03:24 PM 07/14/2009			
4277	Payment Terms Type	New PaymentTermType - Net 3 Days - PURwma	SAVED	COMPLETE	HUNTLEY, KEISHA Y		03:50 PM 07/14/2009			
4398	Vendor	Edit VendorDetail - inactivate	FINAL	FYI	HUNTLEY, KEISHA Y		07:57 PM 07/14/2009		NONE	
4407	Application	Application - Test	SAVED	COMPLETE	HUNTLEY, KEISHA Y		02:35 AM 07/15/2009			
4485	Disbursement Voucher	Disbursement Voucher - IU-taxwithholding-5 [N:A:N:N]	ENROUTE	APPROVE	WATSON, TERRENCE G		11:36 AM 07/15/2009			
4486	Disbursement Voucher	Disbursement Voucher - IU-taxwithholding-6 [N:A:N:N]	ENROUTE	APPROVE	WATSON, TERRENCE G		11:37 AM 07/15/2009			

take actions

Documents sent to your action list may request various types of actions from you. The most commonly requested actions are:

- *Approve:* Verify that the transaction is acceptable. Approved financial documents continue routing to additional approvers, or if fully approved, are included in the next update to the General Ledger.
- *Acknowledge*: View and acknowledge a transaction, without the need for giving formal approval. You must open the document from your action list to clear it out. This type of action request is generated to prior approvers and the initiator when a document is disapproved.
- *FYI:* A courtesy request allowing you to view the transaction or to clear the request from your action list without viewing it. You do not need to view the transactions sent for FYI routing.

Note

For more information about the action list, see Action List.

Searching OLE

As OLE grows to include more document types (patrons, bibliographic formats, licenses, etc.), OLE continues to integrate Search capabilities, where the search functions provide interoperability instead of some of the localized wildcards, limits on bibliographic fields, or other search-specific criteria below. Library users will be included in future testing and development of OLE Search, building upon our emerging search types for:

- Docstore Search / Search Workbench – full Bibliographic searching, edit and modify bibliographic, instance and e-instance (holdings, items, and e-holdings) records
- Acquisitions Search – includes limited Bibliographic searching
- Order Holding Queue – search on requisitions: actions on individual documents, or Approve/Cancel/Calculate return for further action, group of requisitions
- Receiving and Claiming Queue – complete receiving from search via queue, pay for the item, or claim
- Serials Search and Receive - search for serials and create or modify receiving records
- Fund Lookup – query general ledger for account balances and availabilities
- E-Resource Search and License Request Search

KFS inherited transactional Searches (no Bibliographic fields, only transactional- vendor, dates, etc.)

- Payment Request
- Purchase Orders
- Requisition - search on Title, Author, Publisher etc. added to eDoc transactional fields (selector, vendor, dates, doc id, delivery info, account/fund, etc.
- Receiving

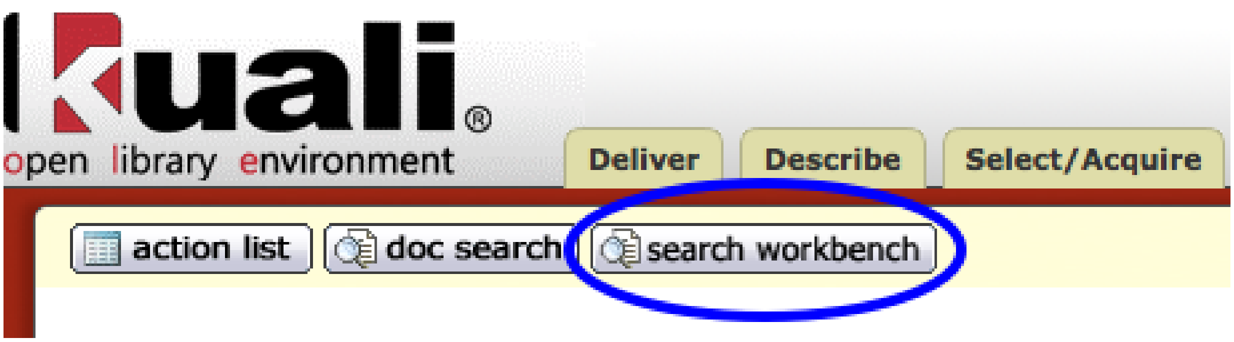
Other search functions available in OLE

- Lookups (referenced as needed in several sections)
- Lookup icon (referenced as needed in several sections; inherited from KFS)
- Custom Document Searches (inherited from KFS)
- Doc Search button
- Saving Custom (Session) Searches (as applied in OLE)

Search Workbench

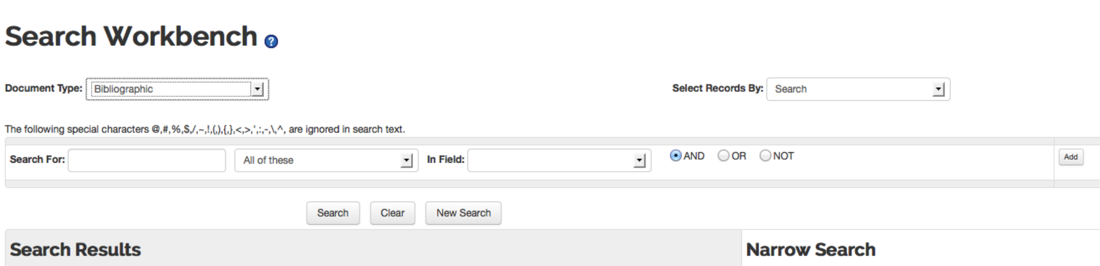
Search Workbench is an OLE search interface, a portal used to locate bibliographic, holdings, eholdings or item records in OLE. From there you can take further actions on records, e.g. viewing or modifying them. The Search Workbench supports a variety of searches and both a title and a call number browse.

Access **Search Workbench** by clicking on the search workbench button. This button is located in the left corner of the upper menu and is visible at all times in any module.



Process Overview

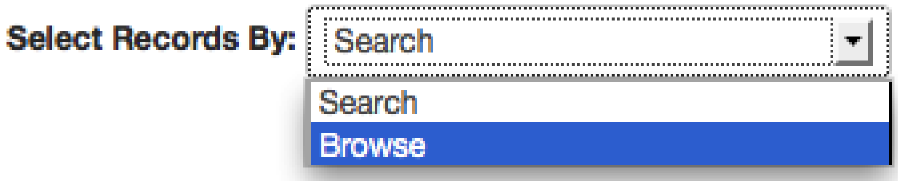
Once you have opened **Search Workbench**, you can perform a search to find a record or set of records.



Getting Started

When **Search Workbench** is first opened, the user will see the simple search interface that is pictured above.

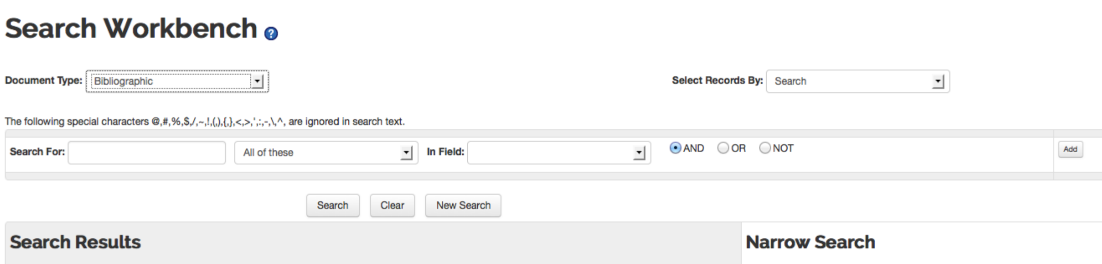
On the top portion of the search interface, on the right hand side, the user is given the option to perform two search types: Search or Browse. These options are found in the **Select Records By** area.



For information on searching, go to the searching section of this document. For information on browsing, go to either the general browsing, title browsing, or call number browsing sections of this document.

Searching

Select **Search** in the “Select Records by:” drop-down list in order to execute a search in OLE.

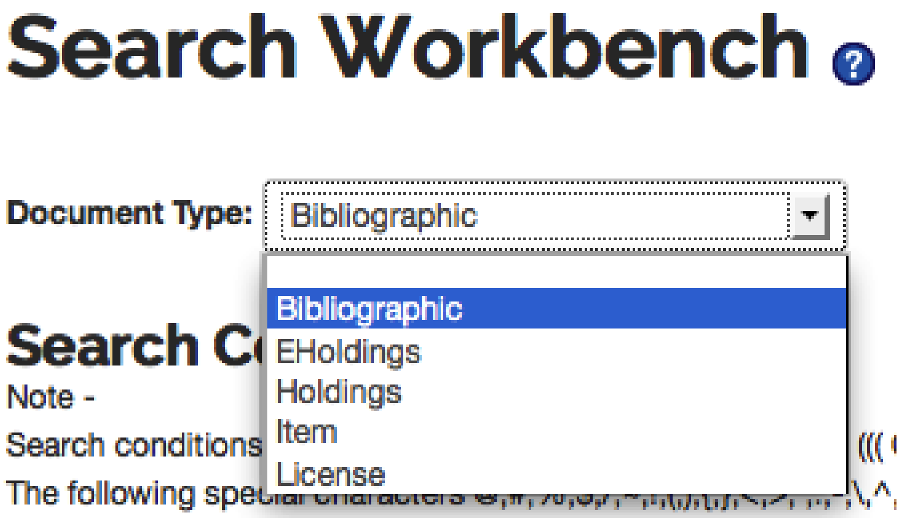


1. First select a **Document Type** from the drop down menu provided. Available **Document Types** are:

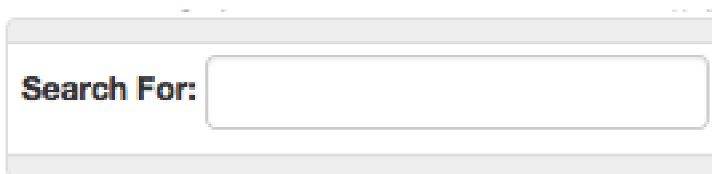
   - Bibliographic: This is the default setting.
   - EHoldings
   - Holdings
   - Item
   - License (Not available in this release)

   ### Note

   The **Document Type** selection drives the menu of available seach fields in the **In Field** menu.



2. The term(s) to be searched are entered in the **Search For** box.

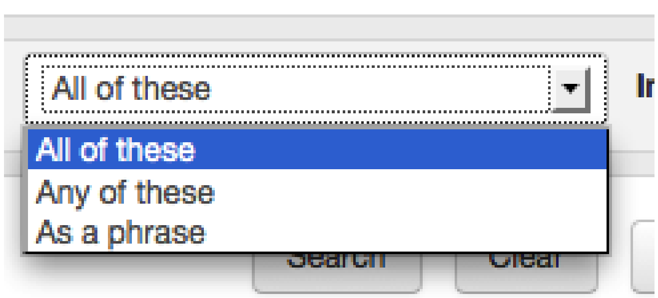


3. Next, you can select from the drop down list with the following options:

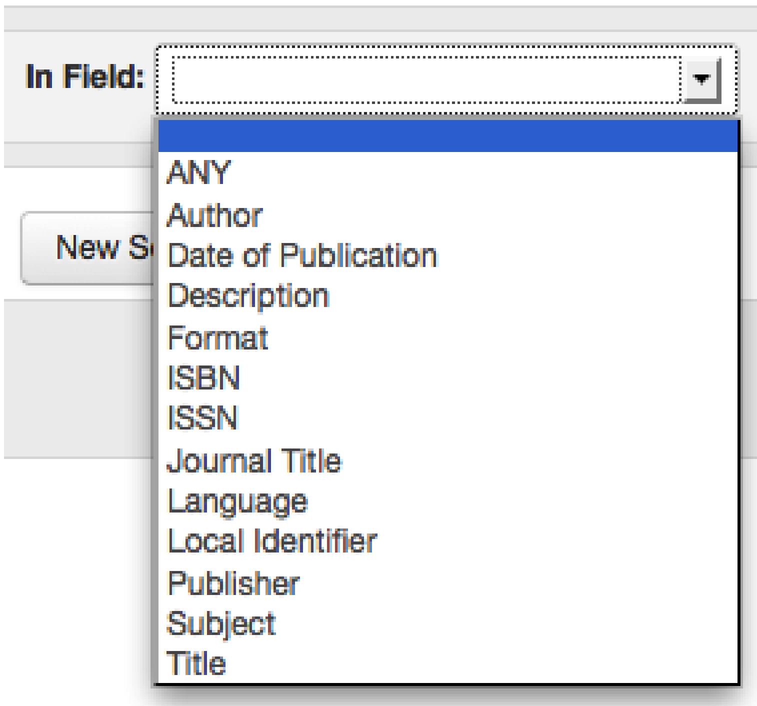
- All of these: all terms are found in the specified field
- Any of these: any of the terms are found in the specified field
- As a phrase: all terms must appear in the specified order

Note

You may search for hyphenated text if you choose to search "As a phrase". As noted on the interface, the hyphen will be ignored. By searching "As a phrase" the order of the text is taken into consideration.



4. Using the **In Field** menu, you can select a field to be searched from a drop-down list. As mentioned above, this menu is driven by the **Document Type** that you selected for your search. You can include all listed fields in your search by leaving the **In Field** box blank or by selecting **ANY** from the drop-down list.



5. You may also select a Boolean operator to apply to your search. To do this, follow these steps:

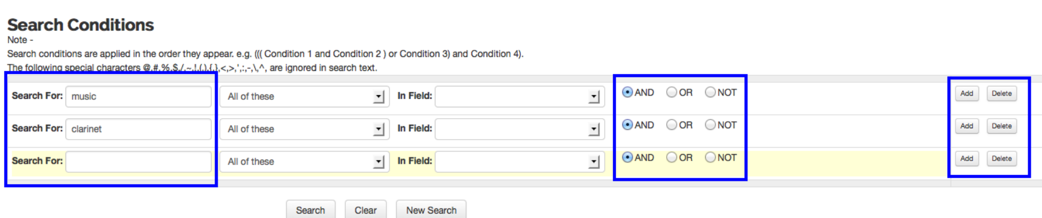
   a. Enter a term in the **Search For** field. It a term is not entered first, then the user will not be able to add fields.

   b. Click the 
 button, located on the right side of the screen, to add an additional search bar.

   c. Enter a search term in the new **Search For** field.

   d. Click 
 to enter more fields, as needed.

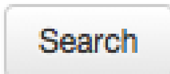
   e. Adjust the Boolean operators as needed by selecting clicking in the radio buttons next to AND, OR, or NOT



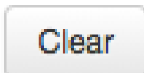
Note

OLE does not currently support cross-document-type searching. You cannot, for example, search for title data in bibliographic record and location data in a holdings record.

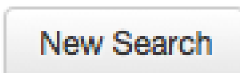
6. There are three options at this point:

   - Click 

 to perform the search.

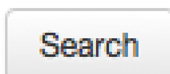
   - Click 

 to clear search values and start a new search.

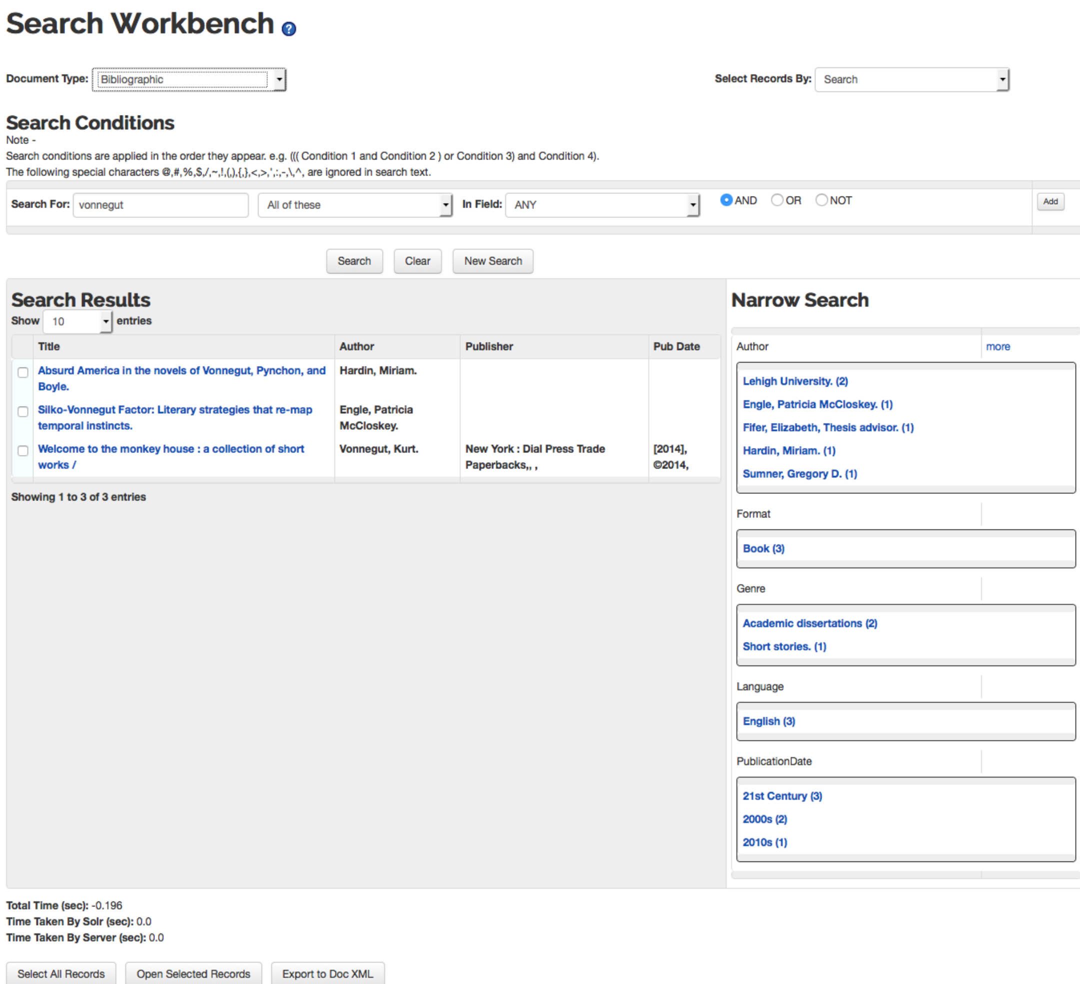
   - Click 

 to perform a new search after you have performed an initial search.

7. You can also perform an "open search." If you do not enter any search terms, all of the records matching the document type will be included in the search results when the Search button is clicked.

8. Once you clicked on 

 you will see the search results:



All records matching your search will display in the search results. There are no maximum record limits to constrain your searches.

To display a single record in the search results for editing from the above example, click in the blue title entry. To open multiple records for editing, put a check in the box to the left of the titles for the records that you want to edit and click on **Open Selected Records** below the search results – each record will open in a separate window.

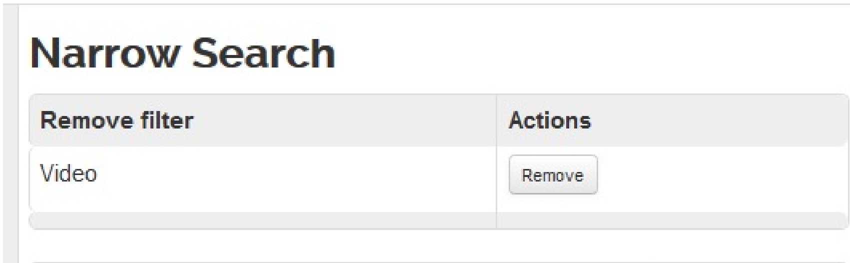
To the right of the search results, you can click on any blue facet to narrow the search results. You can click more above any facet section for additional facet options. Note that facets are presented only with a bibliographic search.

The search results will provide the title regardless of the document type selected. What other information that will display for records in the search results is locally configurable and will vary from institution-to-institution. The number of entries displayed on a screen is also locally configurable. In the example above you can adjust the number of records displayed on a single screen via a drop-down list. Note that you can see the total number of records in the search results just below the list.

At the bottom of the list on the right, you can click on **Next** to go to forward one screen of results or **Previous** to go back one screen.

Click on any blue facet to narrow your search results. You may click **more** above any facet section to view additional facet options.

Click  to remove a facet and expand your search:

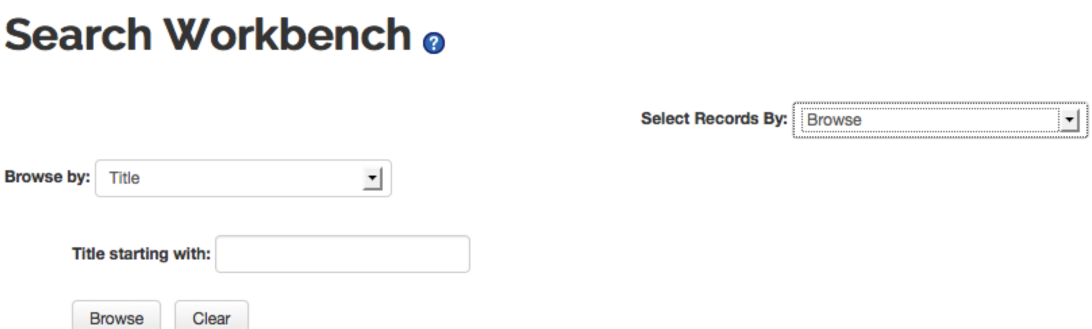


Tip

At the bottom of the search results screen, there is an “Export to XML” button that allows you to open selected records (those with a check) in XML in a window below the search results.

Browsing

The search workbench supports browsing by title and by call number. You can begin browsing by selecting **Browse** in the “Select Records By:” drop-down list.



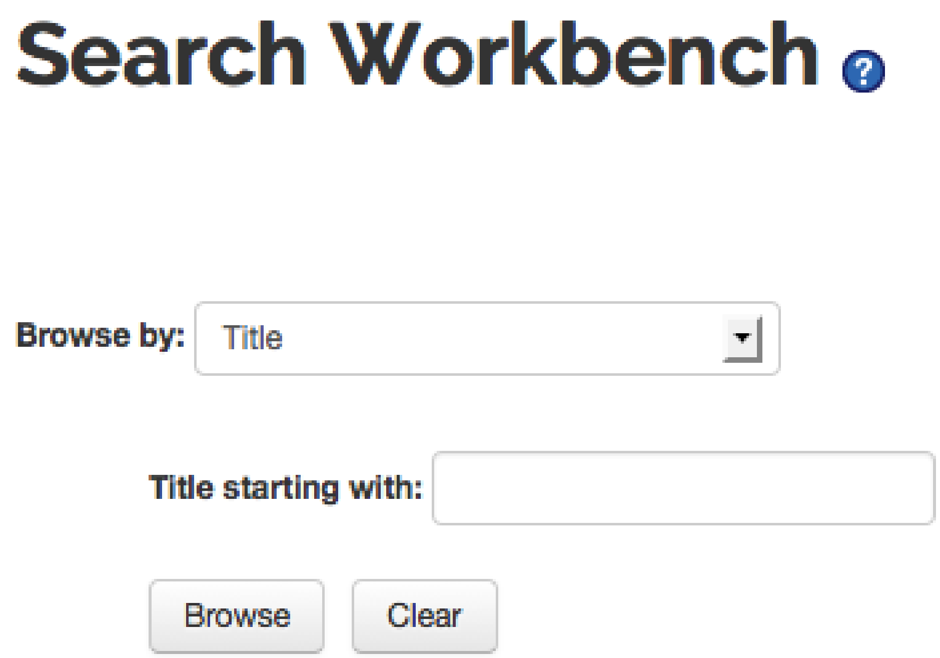
Then select either **Title** or **Call Number** from the “Browse by:” drop-down list. The search interface will differ for title and call number browses.

Title Browsing

A title browse results in a view of the title index at the point where the term(s) that you enter would appear in an alphabetical index of titles in the database. When searching, it doesn’t matter what order your search terms are in, unless you are searching as a phrase. For title browsing, you need to enter your title terms in the order in which they would appear on the bibliographic record. The exception is initial articles – these should not be included in your browse terms. Do not omit non-initial articles, prepositions, etc. when browsing, as these affect browse indexing.

Enter as much of the title as you care to. If you are entering a single term, it must be the first word of the title that is not an initial article.

After selecting **Title** in the “Browse by:” drop-down list, you will see a very simple interface:

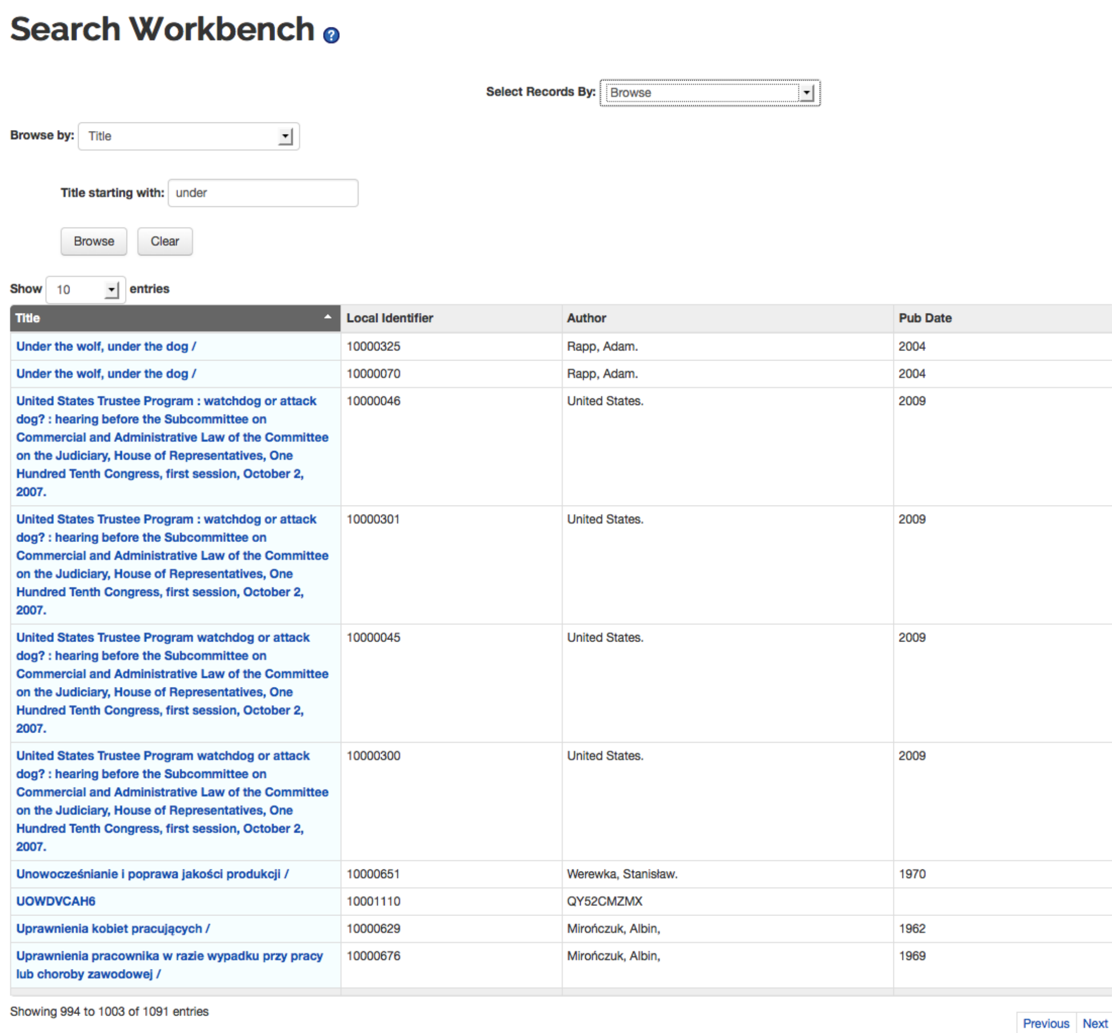


Enter the beginning word(s) of the title in the **Title starting with:** box.

Note

Enter only lower case letters. The title browse functionality does not currently work with upper case letters.

Your browse results will display.



Title	Local Identifier	Author	Pub Date
Under the wolf, under the dog /	10000325	Rapp, Adam.	2004
Under the wolf, under the dog /	10000070	Rapp, Adam.	2004
United States Trustee Program : watchdog or attack dog? : hearing before the Subcommittee on Commercial and Administrative Law of the Committee on the Judiciary, House of Representatives, One Hundred Tenth Congress, first session, October 2, 2007.	10000046	United States.	2009
United States Trustee Program : watchdog or attack dog? : hearing before the Subcommittee on Commercial and Administrative Law of the Committee on the Judiciary, House of Representatives, One Hundred Tenth Congress, first session, October 2, 2007.	10000301	United States.	2009
United States Trustee Program watchdog or attack dog? : hearing before the Subcommittee on Commercial and Administrative Law of the Committee on the Judiciary, House of Representatives, One Hundred Tenth Congress, first session, October 2, 2007.	10000045	United States.	2009
United States Trustee Program watchdog or attack dog? : hearing before the Subcommittee on Commercial and Administrative Law of the Committee on the Judiciary, House of Representatives, One Hundred Tenth Congress, first session, October 2, 2007.	10000300	United States.	2009
Unowocześnianie i poprawa jakości produkcji /	10000651	Werewka, Stanisław.	1970
UOWDVCAH6	10001110	QY52CMZMX	
Uprawnienia kobiet pracujących /	10000629	Mirończuk, Albin,	1962
Uprawnienia pracownika w razie wypadku przy pracy lub choroby zawodowej /	10000676	Mirończuk, Albin,	1969

The information that appears in addition to the title is locally configurable and will vary from institution-to-institution. To edit the bibliographic record for a title in the above example, click on the title. With browse results, you cannot choose multiple records for editing with a single command. However, when you open a record for editing, it opens in a new window, so your browse results remain for selecting additional records for editing if needed.

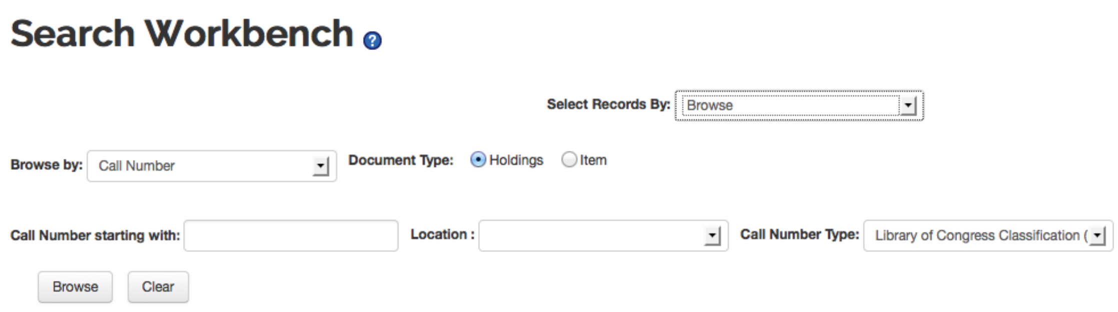
The number of entries displayed on a screen is also locally configurable. In the example above you can adjust the number of records displayed on a single screen via a drop-down list. Note that you can see the total number of records in the search results just below the list.

At the bottom of the list on the right, you can click on **Next** to go to forward one screen of results or **Previous** to go back one screen.

Call Number Browsing

Call number browsing results are also an index display. Enter as much of the call number as you want, but be sure that no elements of the call number are omitted from the string that you enter for your call number browse.

After selecting **Call Number** in the "Browse by:" drop-down list, you will see this interface:

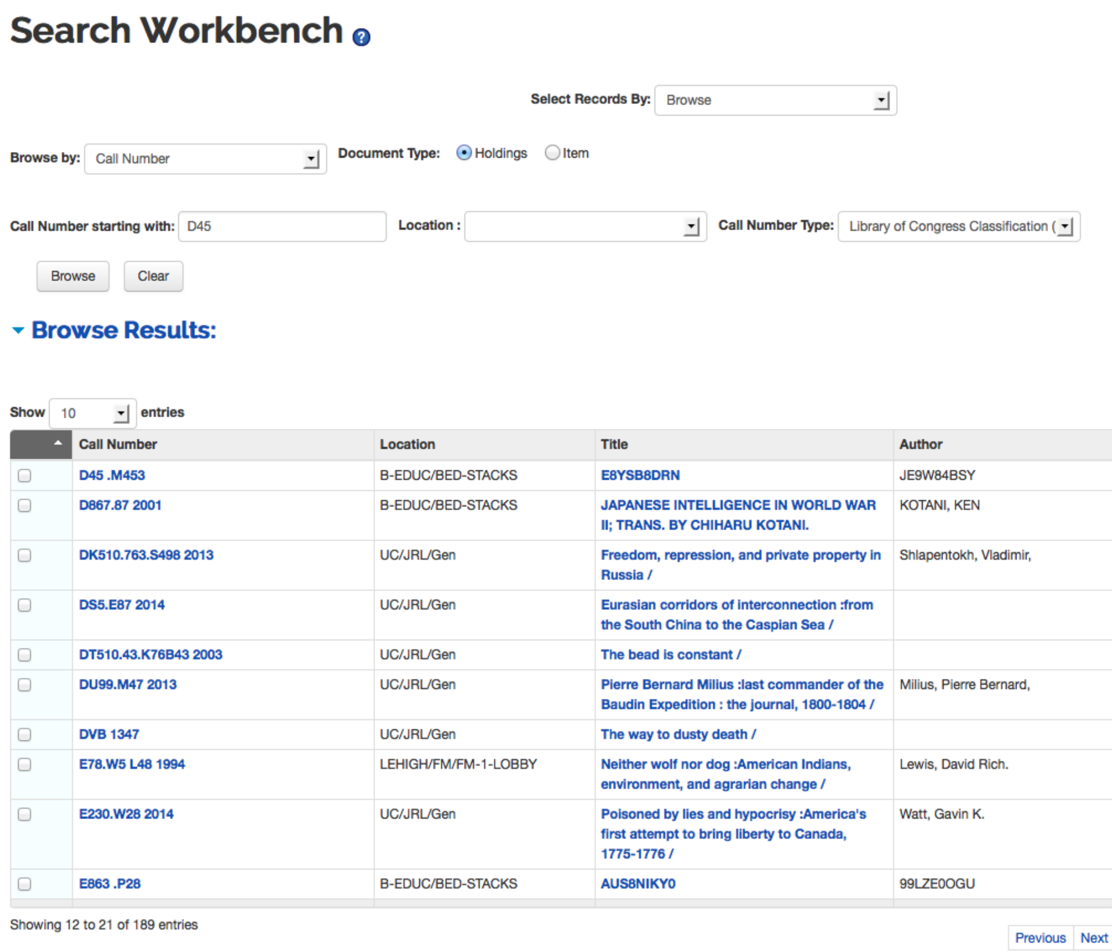


- Using **Document Type**, the user can choose to search a Holdings or Item
- Using **Location**, the user can limit the search by the locations within their library.
- Using **Call Number Type**, the user can select which classification scheme used by their library to search.

Enter all or part of a call number in the **Call Number starting with:** box and click **browse** to produce results.

Note

There are several glitches in sorting by Dewey Decimal Classification. For more information about the issues discovered, please see OLE-6632.



With browse results, you cannot choose multiple records for editing with a single command. However, when you open a record for editing, it opens in a new window, so your browse results remain for selecting additional records for editing.

The information that appears in addition to the title is locally configurable and will vary from institution-to-institution. To edit the bibliographic record for a title in the example above, click on the title.

Clicking on the call number in the example above will open either a holdings record or an item record, depending on which one you selected for your browse.

The number of entries displayed on a screen is also locally configurable. In the example above you can adjust the number of records displayed on a single screen via a drop-down list. Note that you can see the total number of records in the search results just below the list.

At the bottom of the list on the right, you can click on **Next** to go to forward one screen of results or **Previous** to go back one screen.

Actions Available From Search or Browse Results

1. When searching by Document Type **Bibliographic**, click the title to open the bibliographic record editor.

Note

For more information about record editors, see [MARC Editor]

2. When searching by Document Type **EHoldings**, click the title to open the record. Click **edit** on the E-Instance Editor to edit the eholding.

Note

For more information about the E-Instance Editors, see the [E-Instance Editor]

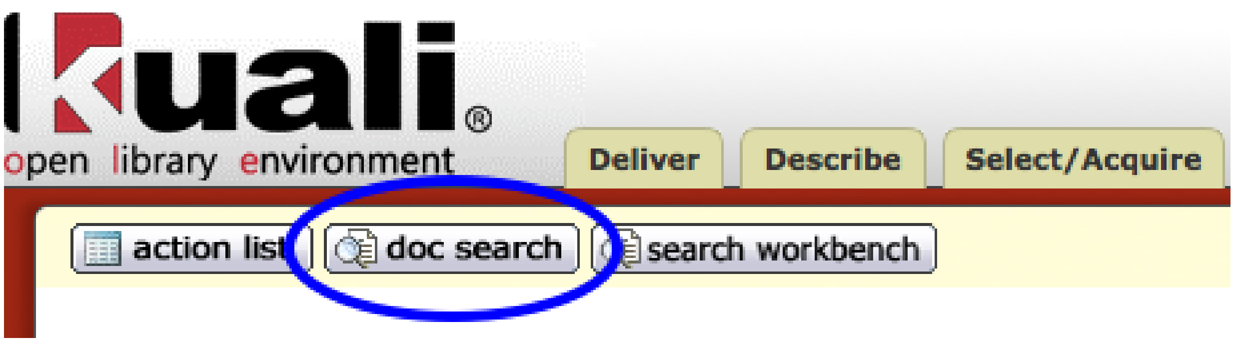
3. When searching by Document Type **Holdings** or **Item**, click the title to open the record. Click **edit** on the Instance Editor to edit the Holdings or Item.

Note

For more information about the Instance Editors, see the [Instance Editor]

Using Doc Search to Find a Document

The **doc search** button is located in the upper left corner of the screen. Using this button, you can search for a document you want to view or work with. This button allows you to quickly search for any transactional or acquisitions document by Document type, by Selector/initiator, dates, or document identification number. Click the search button without entering any criteria to view documents created today.



1. Click 

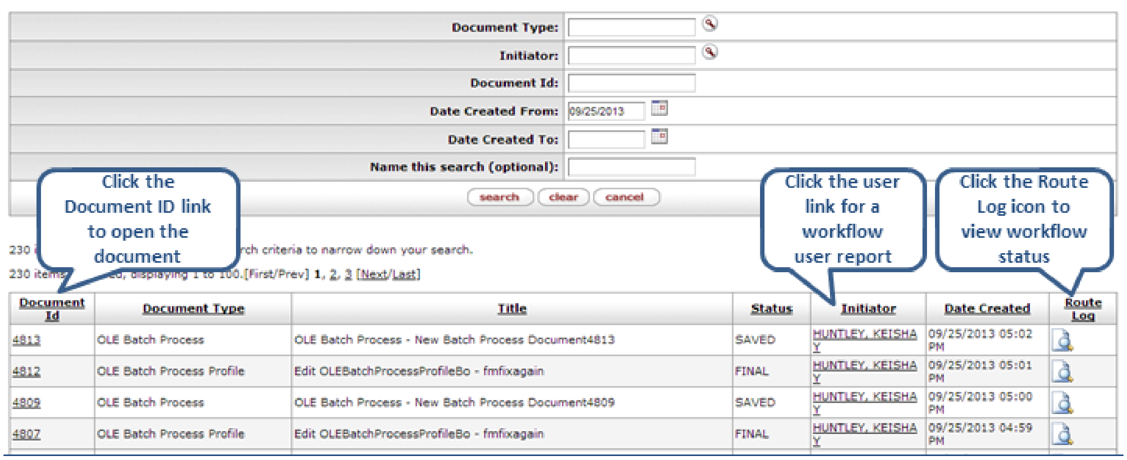
2. Enter search criteria.

Note

For explanations about search criteria fields, see [Standard Data Entry, Selection, Action, and Navigation Tools]() and [Standard Links and Icons]().

3. Click search.

4. Click the **document ID** link to open the document, the **Initiator ID** link to retrieve a workflow user report, or the **Route Log** icon to view the workflow status.



Doc Search Criteria

Field	Description
Type	Document type. Enter the document type or select it from the **Document Type** lookup.
Initiator	User ID of the document initiator. Enter the user ID or select it from the **Person** lookup.

Document/Notification ID	Enter the numeric document ID assigned by the system.
Date Created From/To	Enter or select from the calendar the range of document creation dates to search. You may select the **From** date only, the **To** date only, or both.
Name this Search (optional)	To save the search criteria for future use, enter a name for the search. All saved search are accessed via a list at the top of the document search screen.

Tip

Using Wildcards (*) in the Search Criteria: The use of asterisks in the search criteria allows you to perform pattern matching. To search for documents containing a string of characters in alphanumeric fields such as **Document Title**, you may enter a character string in the search criteria accompanied by asterisks. For example, enter '*test' to search for a document title that ends with the word 'test'. Enter 'test*' to search for a document title that begins with the word 'test'. Enter '*test*' to search for a document title that has the word 'test' somewhere in the document title.

Note

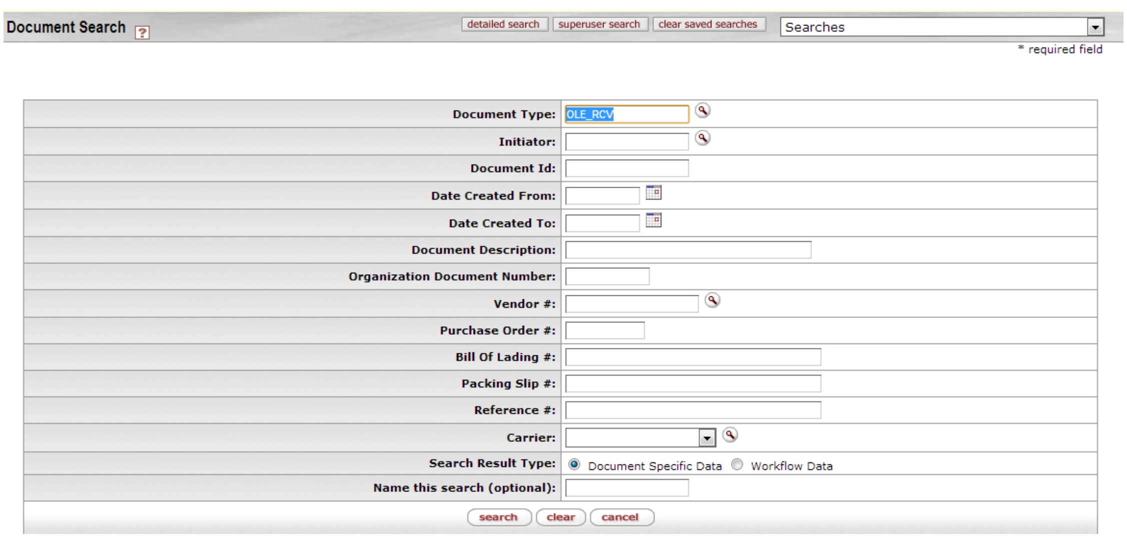
For information about advanced features of the document search, see Advanced Document Searches.

Performing Searches on Financial Documents

OLE also includes several forms of Search in each of the module tabs: Deliver, Describe, Select/Acquire. Many of these are further discussed in the specific section of this Drivers Manual for each function, and each is still under development.

Common Features and Search Options (Financial Docs only)

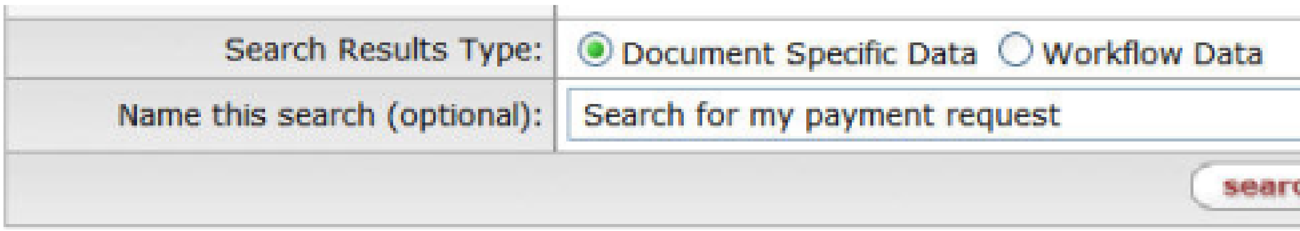
The following example shows the document lookup screen for monograph receiving.



In the example above, the user selected Search from the **Receiving** menu group on the OLE **Select/Acquire** tab. This screen includes the document type OLE_RCV pre-populated in the **Document Type** field. It also contains other fields you may want to use as search criteria in your search for one or more specific monograph receiving documents.

Each search screen gives you options for two search results types.

- *Document Specific Data:* In the search results, display information specific to the document(s).
- *Workflow Data:* In the search results, display information specific to the workflow status of the document(s).



To search for specific documents, follow these basic steps:

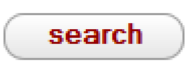
1. To restrict the search to documents that meet criteria of your choice, enter search data as appropriate.
2. If desired, save this set of search criteria for reuse later by entering a descriptive name in the **Name this search field**. Some OLE searches include the option to name and save your searches, so they can be repeated later by the same user. Named searches are available for Requisition, Purchase Order, Receiving and Payment Request searches.

   ## Note

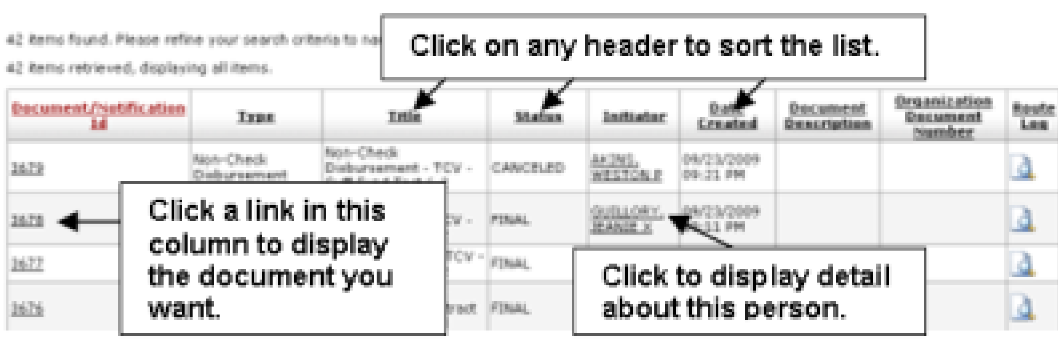
   For information about specific fields, see the help documentation for the particular type of document you are searching for in the OLE Documentation Portal.

   ## Note

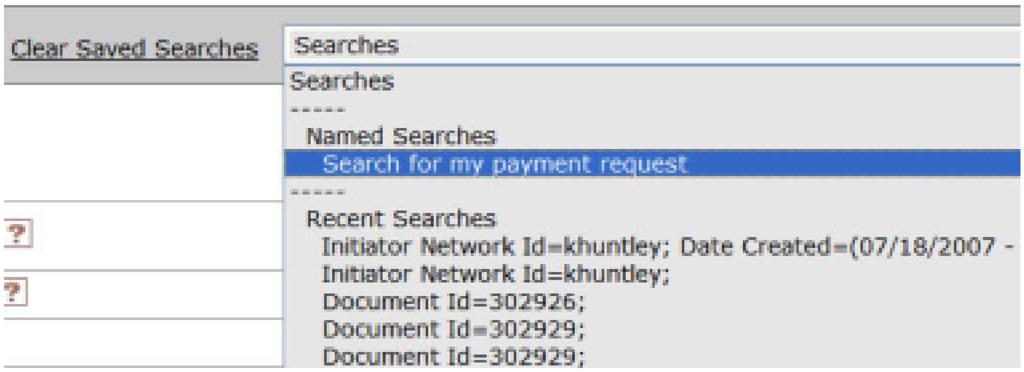
   For tips about data entry, see Data Entry Tips.

3. Click .

   The system retrieves a list of items that match your search criteria.

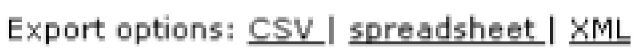


If you gave your search criteria a name, the system also displays the name of your saved search in the **Searches** list at the top of the screen.



4. Choose from among these options.

   - To sort the list, click on the header you want to sort on. Click once to sort in ascending order and click again to sort in descending order.
   - Some cells (such as those in the Initiator column in the example above) have links to screens that display more detail. Click the link to display detail.
   - Some searches have the option of exporting the list. To export the entire list in .csv, spreadsheet, or .XML format, scroll to the bottom of the screen and click a link to choose from among these options

   - After finding the document you want, click the link for it in **Document/Notification Id** column. The system displays the document.

Data Entry Tips

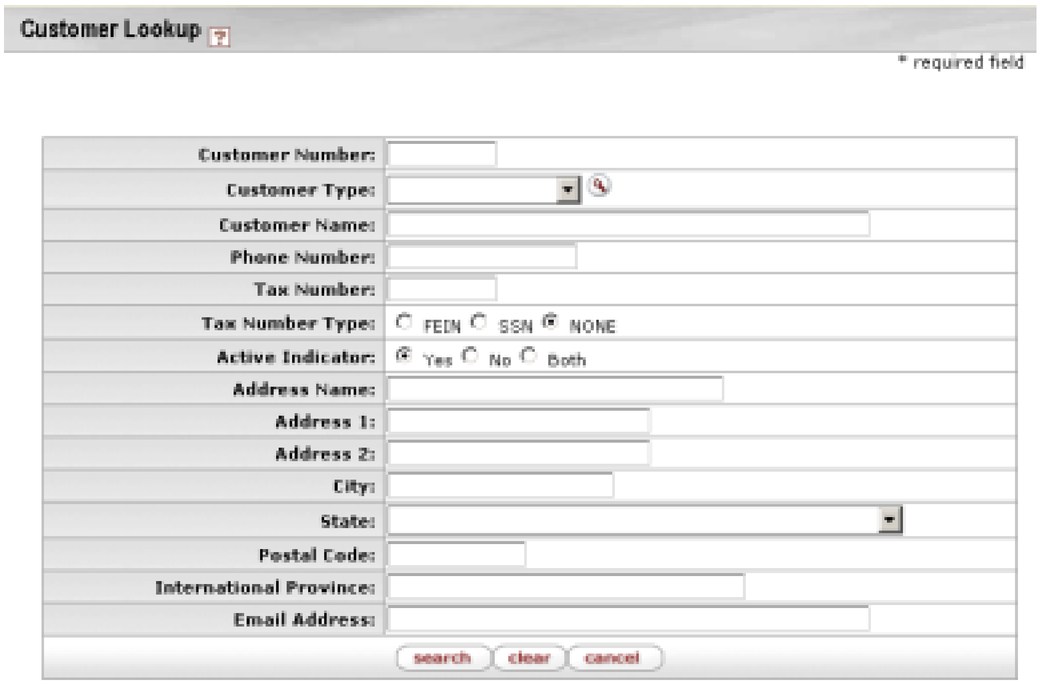
Keep these points in mind as you enter data:

- You may enter data in any or all fields on a custom document search screen. You may also leave all fields blank.
- After you select a document type from the any of the **Select/Acquire Searches**, you can easily change the search to find any other type of document without returning to the **Select/Acquire** tab to select a different search option. In the Document Lookup screen, simply change the code in the **Type** field to reflect the type of document you want to look for (for example, PO) and move your cursor out of the field. The system rebuilds the screen with the proper search criteria fields for the new document type.
- Dates must be specified in mm/dd/yyyy format. You may also click the calendar icon  and then select a date from the calendar.
- For many fields, the system provides a handy lookup tool  that can help you retrieve a value (for example, a customer number) you want to search on but have not memorized.

To use the lookup tool mentioned above:

1. Click the lookup icon for the field you need a value for (e.g., Customer Number).

   The system displays a form to help you find the specific value you need:



2. Enter identifying information (customer name, etc.) in any of the fields provided.

3. Click search to retrieve a list of records that match your entries.

One item retrieved.

Return Value	Customer Number	Customer Type	Customer Name	Phone Number	Tax Number	Tax Number Type	Active Indicator
return value	AME17925		BINKLEY CORPORATION				Yes

4. When you find the record you need, click the return value link to copy the value (customer number in this example) into your custom document search screen.

The following table indicates how to use special characters to expand or limit your searches.

Using special characters in search

Character(s)	Function	Use With	Example (Account Field Number)
!	Not equal to	Alphanumeric characters	!1031490 Matches on all account number **except** 1031490

&&	And	All types of data	1111500&&1123400 Matches on records that contain **both** of these account numbers: 1111500 1123400
*	Match on any character or characters	Alphanumeric characters	103* Matches on all account numbers that **start with** 103 (1030000, 1039765, etc.)
..	Between (inclusive range)	Alphanumeric characters, numbers, dates	1031490..1111500 Matches on account numbers **equal to or greater than** 1031490 **and** on account numbers **less than or equal to** 1111500
<	Less than	Alphanumeric characters, numbers, dates	<1031490 Matches on all account numbers **less than** 1031490
<=	Less than or equal to	Alphanumeric characters, numbers, dates	<=1031490 Matches on all account numbers **less than or equal to** 1031490
>	Greater than	Alphanumeric characters	>1031490 Matches on all account numbers **greater than** 1031490
>=	Greater than or equal to	Alphanumeric characters, numbers, dates	>=1031490 Matches on all account numbers **greater than or equal to** 1031490
?	Match on any single character	Alphanumeric characters	103?490 Matches on all seven-digit account numbers that start with 103 and end with 490 (1030490, 1031490, etc.)
Or	All types of data	1111500	1123400 Matches on **either** of these two account numbers: 1111500 1123400

Note

For more information about searches, see Using Doc Search to Find a Document and Advanced Document Searches.

Lookup Help

Specifying search criteria:

- Most fields will be uppercased for search.
- Dates should be specified as MM/dd/yyyy.
- Some fields have magnifying glass button for a sub lookup on that field.
- Wildcards allowed on strings are * and % match any number of characters, while using a ? will match any one character
- Logical operators allowed include && (And) as well as | (Or) to join multiple search criteria

- Range operators allowed on numerics and dates are >,<,>=,<=, or ..

  All operators except .. should be before date value. Operator .. should separate date values.

Result Table:

- Each result field has link on header for sorting. Click once to sort ascending,

  and click again to sort descending.
- Some row fields have links to inquiry. The inquiry will be presented in a new window.
- Click the return value link to select a row and return the key value to the previous page.

  Select 'return with no value' or click the cancel button if you wish to return without returning a value.

Maintenance Links:

- The 'create new' link on the upper left corner of the lookup screen will

  go to a maintenance document for creating a new record for this lookup type.
- For each result row the action column displays edit and copy links. The 'edit' link

  will go to a maintenance document for editing the current record. The 'copy' link

  will go to a new maintenance document but copy over attributes over the current record.

Export Functionality:

- At the end of each result set, there are links for exporting the data to a different format.
- Click 'csv' to export the data as a comma delimited file, 'spreadsheet' to export the data as a spreadsheet,

  or 'xml' to export the data as xml.

Chapter 3. Maintenance E-Doc Fundamentals

Many OLE electronic documents (eDocs) contain data fields that must be filled in from a controlled list, either by choosing from a drop-down menu, or by doing a lookup search to find valid values. The choices for these fields are defined in another type of OLE eDoc, called a maintenance document.

In OLE, maintenance documents are located on the **Maintenance** menu tab.

Note

For information about the structure of OLE, see Navigating through OLE

All of the maintenance eDocs are viewed and maintained in a similar fashion. Selecting the desired table from the **Maintenance** menu tab takes you to the lookup screen. From that screen you may create a new maintenance eDoc by clicking the **create new** link or search the table to view, edit, or copy a table value. OLE maintenance eDocs have varied permissions and access. Most users can perform lookups and selections, or view some of the data, but not all users can edit or create new maintenance tables.

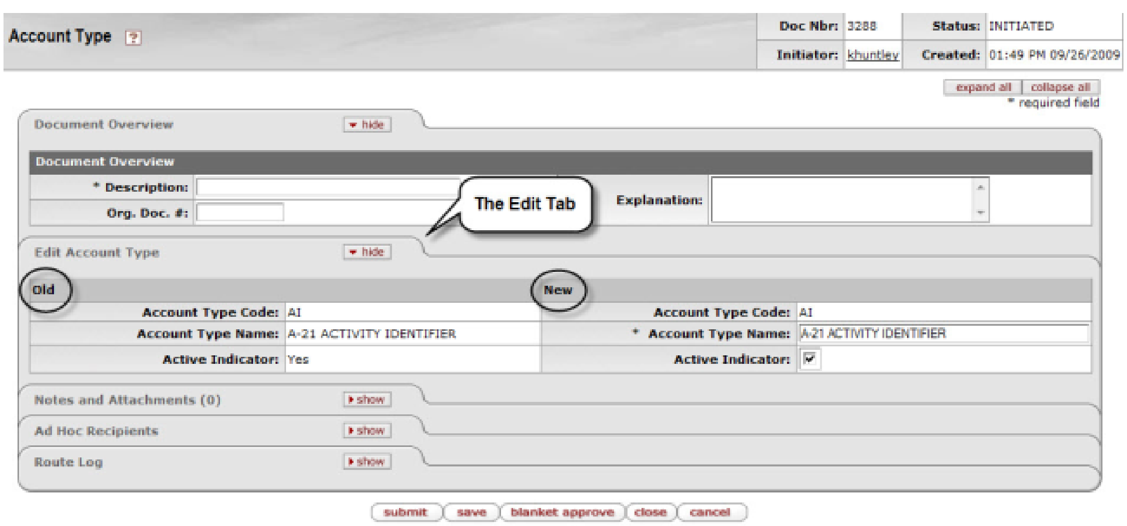
Common Tabs

The typical maintenance e-doc contains the **Document Overview**, **Notes and Attachments**, **Ad Hoc Recipients**, **Route Log** tabs, and an additional tab called **Edit xxx** tab, or **Add/Edit xxx**, where xxx is the name of the table. For example, the Account Type document has the **Edit Account Type** tab below the **Document Overview** tab.

Edit Tab

Each document has its own unique tab named **Edit xxx**, where xxx is the name of the table values that you want to maintain. The layout and data fields within the **Edit** tab vary depending on the document type and whether you are creating, editing or copying the document.

The **Edit** tab has one section when you are creating a new value. As shown below, the tab has two sections: **Old** and **New**. This occurs when you are editing the existing code.



This display allows the document to serve as an audit trail for the maintenance table update history. In the **New** section, only non-identifying fields are editable.

Note

Non-Editable Documents: There are some view-only documents which are not editable because all fields in the table are key identifying fields. Some tables in this category include the Barcode Status and Patron Note Type. When you search for a document, you are not able to see the edit link in the lookup screen. These tables must be updated directly in the database by the technical staff.

Other Common Tabs

Maintenance e-docs contain additional tabs that are also common to other e-docs. They are:

- Document Overview Tab
- Notes and Attachments Tab
- Ad Hoc Recipients Tab

Note

For information about the these tabs, see Standard Tabs and Route Log.

Common Business Rules

- All users can look up the table values.
- Only the members of the higher level roles (OLE-SYS Manager, OLE-SELECT Financial-AQ4, AQ5, KR-PTRN Patron Manager, KR-LIC OLE_LicenseConfiguration are some examples) can initiate a document to create or modify the table values.
- These documents do not route for approval.

Performing Common Maintenance E-Doc Operations

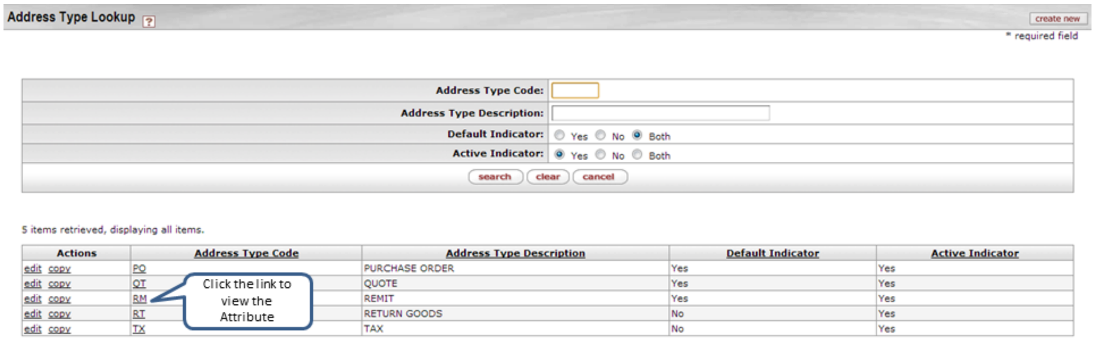
All of the maintenance documents are viewed and maintained in a similar fashion. Selecting the desired table from the maintenance menu takes you to the lookup screen. From that screen you may create a new document by clicking the **create new** link or search the table to view, edit, or copy a table value. These common operations are explained below, using the Address Type document as an example.

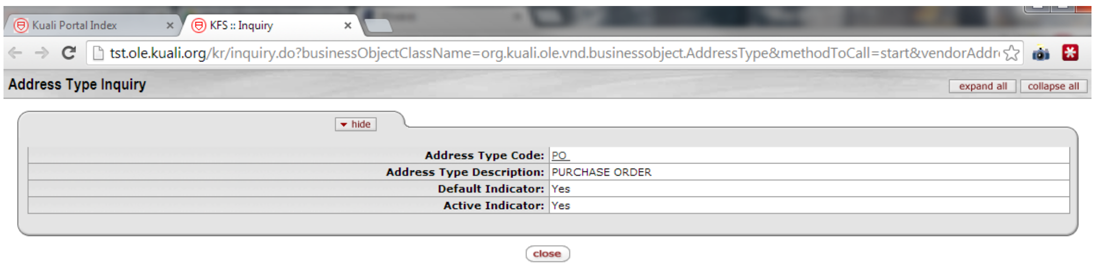
Searching for a Document

(Alternatively, a user will make selections from the Lookup icons inside transactional documents - the values of these Selection or Controlled Value lists are maintained via the maintenance docs in the Maintenance menu. For more information, tips, and suggestions see Searching OLE.)

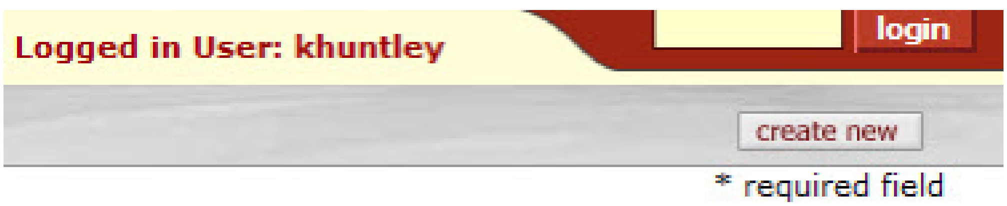
1. Select the desired maintenance e-doc from the **Maintenance** menu.
2. When the lookup screen appears, enter appropriate search criteria or leave blank to retrieve all. Click search

3. Click the **code** link for the value you want to view.





4. Click the create new button from the lookup screen to create a new entry to the table.



Initiating a Maintenance Document

1. Select the desired maintenance e-doc from the **Maintenance** menu.

2. Click the create new button located in the upper right corner or search for a document and click the **create new** button from the view window.

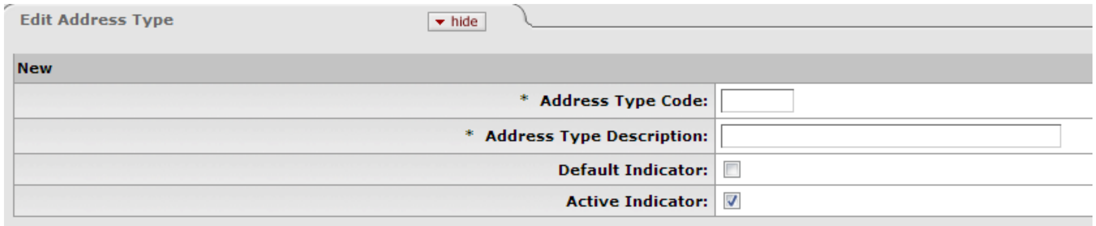
   The document appears with a new Document ID.

3. Complete the common Document tabs – **Document Overview** tab, **Notes and Attachments** tab, or **Ad Hoc Recipients** tab as needed.

   ## Note

   For information about the common financial transaction tabs such as **Document Overview**, **Notes and Attachments**, and **Ad Hoc Recipients, Route Log** tabs, see Standard Tabs.

4. Complete the **New** section in the **Edit** tab.



Note

For requirements for the **Edit** tab or the **Add/Edit** tab, see the help documentation for the appropriate document type in the guides listed in the OLE Document Portal

5. Click .

6. Review the **Route Log** tab.

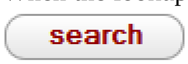
Note

For more information, see Route Log.

Copying a Maintenance Document

(Initiating a Document Based on Another)

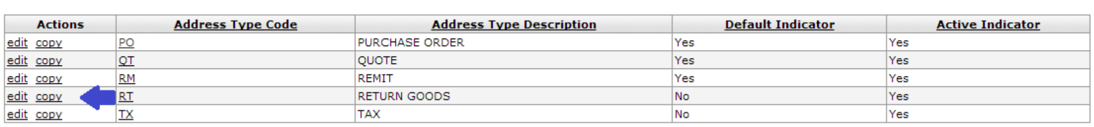
1. Select the desired maintenance e-doc from the **Maintenance** menu.

2. When the lookup screen appears, enter appropriate search criteria or leave blank to retrieve all. Click .

Note

For more information about lookup, see Field Lookup.

3. Click the **copy** link in the Actions column corresponding to the table value you want to copy from.



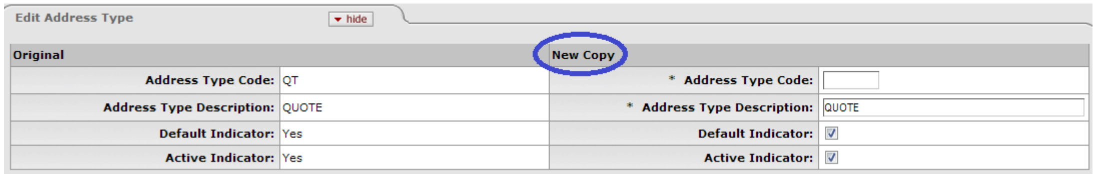
Actions	Address Type Code	Address Type Description	Default Indicator	Active Indicator
edit copy	PO	PURCHASE ORDER	Yes	Yes
edit copy	QT	QUOTE	Yes	Yes
edit copy	RM	REMIT	Yes	Yes
edit copy	RT	RETURN GOODS	No	Yes
edit copy	TX	TAX	No	Yes

4. Complete the standard tabs – **Document Overview** tab, **Notes and Attachments** tab, or **Ad Hoc Recipients** tab as needed.

Note

For information about the standard financial transaction tabs such as **Document Overview**, **Notes and Attachments**, and **Ad Hoc Recipients, Route Log** tabs, see Standard Tabs.

5. Complete the **New Copy** section in the **Edit** tab.



Note

For requirements for the **Edit** tab or the **Add/Edit** tab, see the help documentation for the appropriate document type in the guides listed in the OLE Document Portal. Maintenance documents are explained in their corresponding module guide.

6. Click .

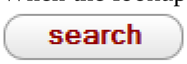
7. Review the **Route Log** tab.

Note

For more information, see Route Log.

Editing a Maintenance Document

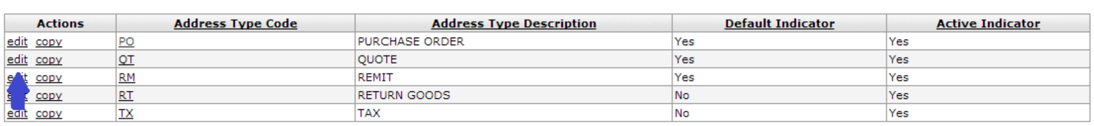
1. Select the desired maintenance e-doc from the **Maintenance** menu.

2. When the lookup screen appears, enter appropriate search criteria or leave blank to retrieve all. Click .

Note

For more information about lookup, see Field Lookup.

3. Click the **edit** link in the Actions column corresponding to the table value you want to copy from.



Actions	Address Type Code	Address Type Description	Default Indicator	Active Indicator
edit copy	PO	PURCHASE ORDER	Yes	Yes
edit copy	QT	QUOTE	Yes	Yes
edit copy	RM	REMIT	Yes	Yes
copy	RT	RETURN GOODS	No	Yes
edit copy	TX	TAX	No	Yes

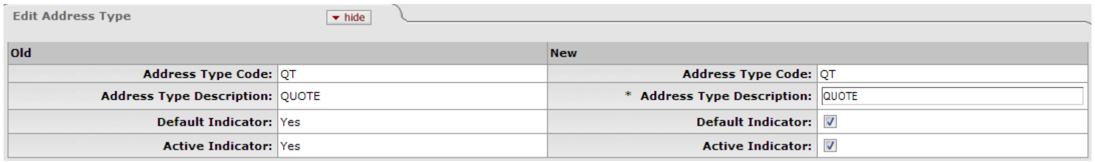
The document appears with a new Document ID.

4. Complete the standard tabs – **Document Overview** tab, **Notes and Attachments** tab, or **Ad Hoc Recipients** tab as needed.

Note

For information about the standard financial transaction tabs such as **Document Overview**, **Notes and Attachments**, and **Ad Hoc Recipients, Route Log** tabs, see Standard Tabs.

5. Complete the **New** section in the **Edit** tab.



Note

For requirements for the **Edit** tab or the **Add/Edit** tab, see the help documentation for the appropriate document type in the guides listed in the OLE Document Portal

6. Click 
.

7. Review the **Route Log** tab.

Note

For more information, see Route Log.

Note

You are allowed to edit non-identifying fields only. In edit mode, note that certain fields are not editable. You are only allowed to change the non-identifying fields associated with OLE code you are trying to edit. When the active/inactive flags are available for the reference table, you can first make the existing code inactive and then create a new code to change the identifying fields. If the active/inactive flags are not available, the changes must be made by the technical staff.

Fiscal Year Maker

Note

Fiscal Year Rollover continues to be reviewed or modified from inherited KFS functionality. ALL could change in future releases.

This batch job (OLE-SYS fiscalYearMakerJob) copies table values that are specific to a fiscal year into another fiscal year. Generally this job is used to copy values in maintenance tables from the current fiscal year into the next fiscal year to prepare those tables for future use. Some modules, such as Budget Construction, may require that these tables be updated with next fiscal year's values well before the end of the current fiscal year. Two parameters are used to control the Fiscal Year Maker process:

- OLE-SYS SOURCE_FISCAL_YEAR controls the fiscal year for which the Fiscal Year Maker batch process will copy certain maintenance table data to the next sequential year.
- OLE-SYS OVERRIDE_TARGET_YEAR_DATA_IND has a 'Y' or 'N' indicator that controls the mode in which the Fiscal Year Maker's batch process runs.
- 'N' copies values to the new fiscal year without overwriting any values that already exist in the new year.
- 'Y' copies values to the new fiscal year and overwrites any values that already exist in the new year.

Fiscal Year Maker impacts the following maintenance tables.

- Chart of Accounts tables: Accounting Period Object Code Offset Definition Organization Reversion Organization Reversion Detail Sub-Object Code
- Financial tables: Fiscal Year Function Control
- General Ledger tables: University Date
- System tables: System Options

Extended Attributes

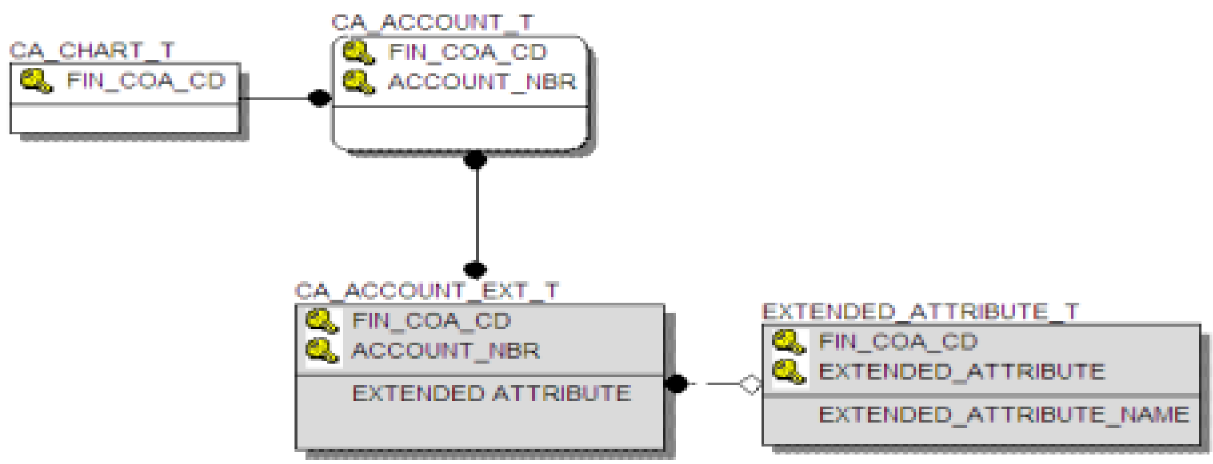
OLE allows you to add attributes to your maintenance tables in the event your institution requires additional attributes for reporting purposes. These attributes are called extended attributes.

Extended attributes can either be free text fields or have an associated reference table to supply valid values. The data dictionary can be configured by your technical staff in the following manner:

- An extended attribute displays on the associated e-doc
- An extended attribute can be made required or optional
- An extended attribute can be available as search criteria and/or in the search results in a lookup.

General Guidelines

How to add extended attributes to OLE: The steps in creating extended attributes involve your technical staff for the most part. Additional technical documentation is available. For example, a community college is required to track multiple additional attributes on the Account Table to meet the reporting requirements of community colleges. Each of these fields has a list of valid values that must be maintained in the system. One extension table with the multiple fields is added to the Account Table. These multiple new fields appear on the Account document. A new reference table for each new field is created to maintain the list of valid values for the new fields. Each of the reference tables appears as a new document on the **Maintenance** menu tab of OLE.



Dos

- Business rules can be applied to extended attributes the same as they could be applied to any other attribute delivered with OLE.
- Modification to include security and encryption can be applied to extended attributes as well just as the other existing OLE attributes.
- The data definition language, including referential integrity for extension tables are the responsibility of the implementing institution.

Don'ts

- Extended attributes are not intended to add additional fields to the accounting string and should not be added to tables such as GL Balance or GL Entry tables.
- Extended attributes should not be added to the workflow tables.

Chapter 4. OLE Workflow Overview and Key Concepts

The Kuali Enterprise Workflow (KEW) is a general-purpose, content-based electronic routing infrastructure or workflow engine. Its main purpose is to automate the routing of electronic documents (e-docs) to individuals and groups for approval, yet the KEW can also be used to orchestrate complex processes between business components and applications. Approval routing is based on institutional or departmental business rules and policies. A new routing option called PeopleFlow is also available from the KEW to provide a streamlined way to view and update routing actions. This section provides an overview of KEW as it relates to the OLE.

KEW Overview

Kuali OLE uses the KEW to handle the routing of electronic documents for actions such as approvals, acknowledgments and FYI notifications. Although much KEW functionality works behind the scenes, the **action list** and **doc search** buttons and the **Workflow Admin** submenu options on the OLE **Admin** tabs are part of the KEW. These workflow options allow you to access, act on, and search for many types of e-docs from various functional areas from a single location. Additionally, the **Route Log** tab on OLE e-docs is a workflow feature that allows you to follow the progress of given documents through the approval process.

Note

Many facets of Workflow (such as the route nodes that define how a given document type routes) are stored in workflow process definition files for the various document types. These files can be easily modified to alter the default routing of documents in your OLE implementation, but doing so requires a technical resource and as such is beyond the scope of this documentation.

OLE Workflow relies on Kuali Identity Management (KIM) to specify when workflow action requests are to be generated and who should take action to fulfill them. Functional users employ the KIM interfaces to make changes that affect the routing of documents.

Note

KFS Knowledge Transfer - KIM functions (roles permissions, responsibilities) was a video conference about roles and workflows. It also contains a visual demonstration on responsibilities.

PeopleFlow Overview

PeopleFlow is a new Kuali Rice feature that Kuali OLE is now using for License Requests and Electronic Resources. PeopleFlows are a prioritized list of people to send requests to. Essentially, it's like a mini people-based workflow that doesn't require you to specify a KEW 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 - a common rules engine for defining decision logic, commonly refereed to as business rules) 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.

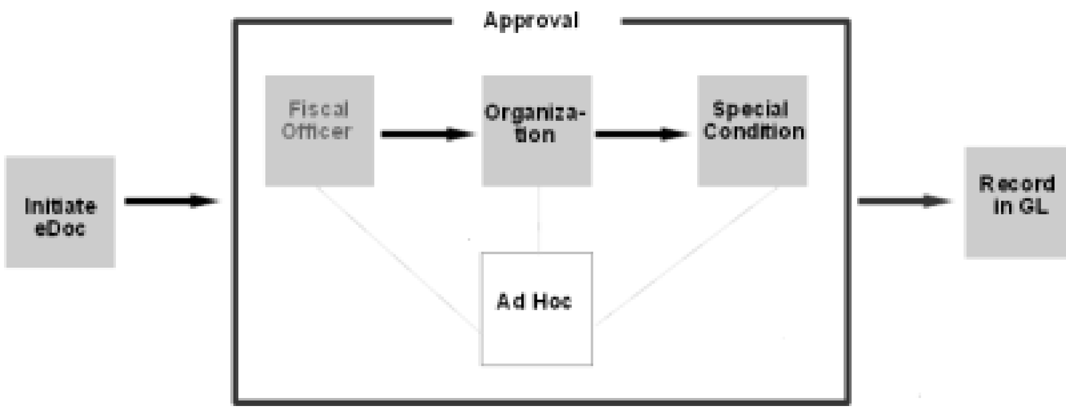
The same PeopleFlow that defines a routing order among a set of persons, groups or roles can be called by KRMS rules, with the KRMS rules defining which type of request to pass to the PeopleFlow (for example, an "approval" routing action or a "notification").

Note

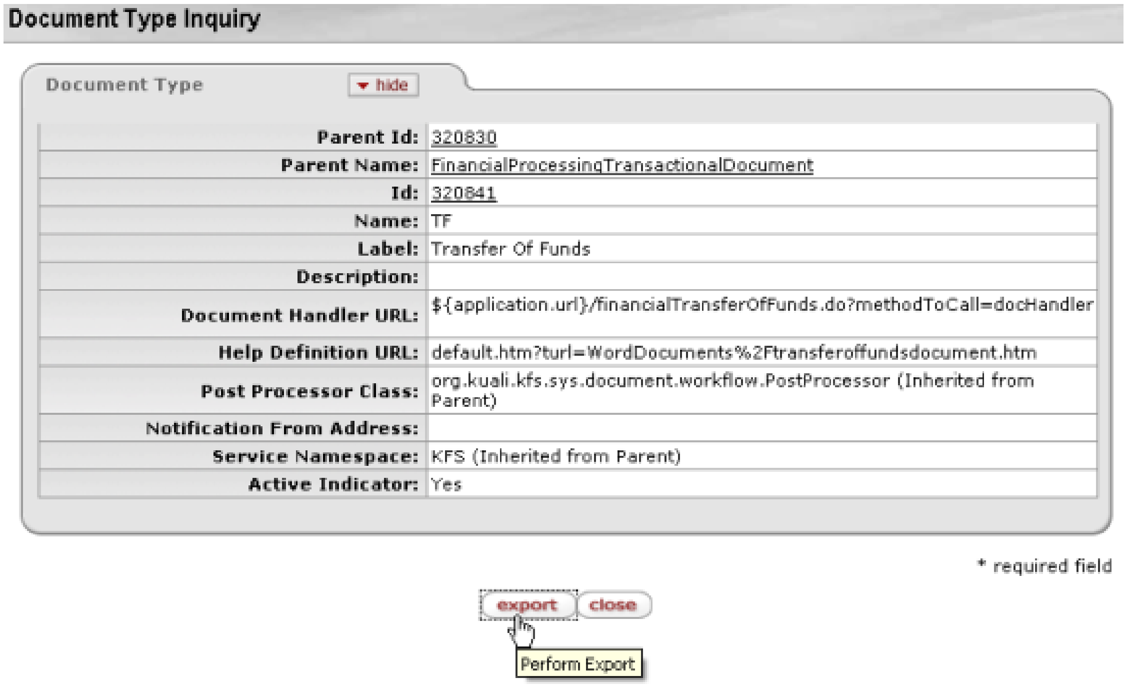
For information about creating and managing PeopleFlows in OLE, see [PeopleFlow]() in the *[Guide to OLE System Administration Functions.]()*

Route Levels and Workflow Routing

Documents route by progressing through a series of route levels (also called 'route nodes'). Many of the financial e-docs on the Select/Acquire menu, and other e-docs throughout OLE, support both pre-established workflow routing and ad hoc routing. Here is an example of the approval route nodes that a typical financial processing document passes through:

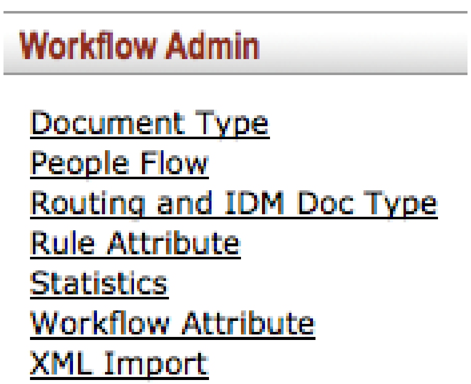


In workflow routing, a document's type (General Error Correction, Transfer of Funds, etc.) determines the route levels it passes through. Route nodes are defined by document type within the workflow process definition file. To view workflow process definitions in XML, use the **export** button on the Document Type Inquiry.



You may need technical assistance to understand or modify a workflow process definition file. Given that assistance, the file can easily be modified to change a document's routing behavior.

An easier view for functional users is located in the **Routing & IDM Doc Type** (Routing and Identity Management Document Type Hierarchy) option in the **Workflow Admin** submenu on the **Admin** menu.



The KEW arranges OLE document types in a hierarchical fashion, with some document types being 'parent' to the document types below them in the hierarchy. 'Child' document types inherit attributes from their parents. The Routing & IDM Doc Type Hierarchy screen displays documents in their respective positions in this hierarchy and also displays the route nodes associated with each document type. Nodes are listed in the order in which the document progresses through them.

The following example shows route nodes associated with the Transfer of Funds document type viewed through the Routing & IDM Doc Type Hierarchy.

Transfer Of Funds (TF)	Edit Document Type Configuration	View Document
Account		
AccountingOrganizationHierarchy		
SubFund		
Award		

Typical Route Levels of the OLE financial documents

Note

Routing and roles inherited from KFS continue to exist within OLE. Many of the route nodes remain listed but are passed over in OLE. These options remain available for institutions that wish to implement them.

Most, but not all, Kuali financial documents are able to progress through three route levels: account level, organization hierarchy, and special conditions.

Account Level Routing (Fiscal Officer)

Each account in OLE is assigned a designated approver called a fiscal officer. This individual is responsible for maintaining the fiscal integrity of an account and is often one of the first approvers to review a document that impacts the account. Most financial processing documents are routed to the fiscal officer for each of the accounts identified in the document. For example, Sue is the fiscal officer for account 1012300. All financial transactions involving this account are routed to Sue for approval.

Organization Review (Review Hierarchy) Routing

Every account belongs to an organization. The organization develops customized routing to appropriate roles based on criteria such as document type, dollar amount and override code. This routing may take advantage of the Chart of Accounts organization hierarchy, meaning that approvals are set up at different levels in the organization hierarchy. A document proceeding through this hierarchy routing might route to someone at the department level, then route to someone else at this department's school or college.

Organization hierarchy routing (corresponding to the AccountingOrganizationHierarchy route node) is very flexible and may be customized to be as simple or complex as needed. For example, it can be set up to accommodate appropriate routing when the head of acquisitions wants to approve every Transfer of Funds document over $1,000 that involves an account reporting to his organization.

Some documents without dollar amounts (such as account maintenance documents) also use organization hierarchy routing. While technically distinct, this type of routing functions exactly as described above without regard to dollar amount or override code.

Special Conditions Routing

Special condition routing is a blanket term for additional route levels that might be triggered by various attributes of a transaction. Special conditions often represent special administrative approvals that may be required. This routing may be based on the type of document, attributes of the accounts being used, or other attributes of the transaction.

Examples of special conditions routing

Routing Type	Description	E-Docs
Content Routing	If the document's content is incomplete, routes the document to an appropriate individual for completion.	Requisition
Separation of Duties	If the amount of the document exceeds an institutionally-defined threshold and there have been no approvers other than the document initiator, routes the document to a defined central approver.	Requisition
Sub-Account Routing	If the document uses a sub-account and the sub-account has a routing rule established, routes the document to the person, group or role for which the rule has been established.	Purchasing related e-docs
Sub-Fund Routing	If a sub-fund derived from an account appearing on the document has a routing rule established, the document routes to the person, group or role for which the rule has been established.	Financial transactions e-docs

Ad Hoc Routing

Ad hoc routing allows a document initiator or approver to add additional individuals or groups to the routing of a specific document. In most cases, ad hoc approvers inserted into the routing interrupt the regular routing process. For example, when a user initiates a financial document and ad hoc routes it to another user for approval, the document routes to the ad hoc approver before it routes to the fiscal officer.

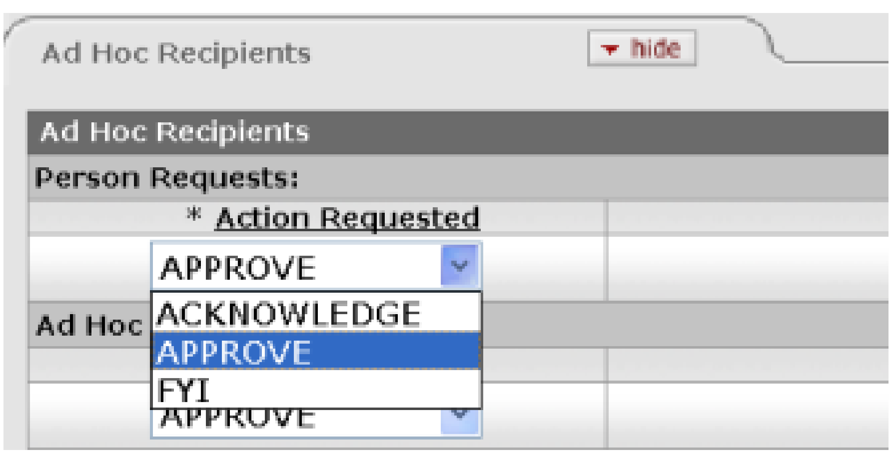
Tip

Ad hoc acknowledge and FYI routing do not interrupt the regular routing process.

Financial processing documents with these types of ad hoc requests still pending post to the General Ledger as soon as all other approvals are obtained. The system does not put them on hold while waiting for the acknowledgment to take place or for the FYI to be cleared.

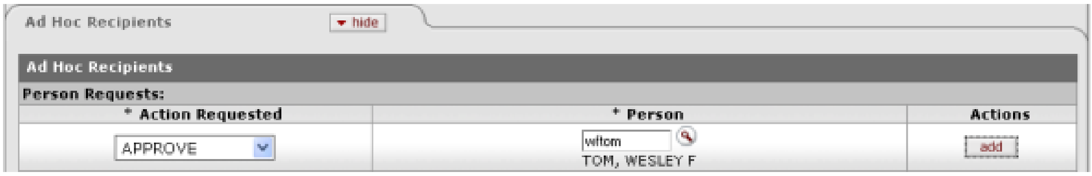
The following steps describe how to add an ad hoc recipient in the **Ad Hoc Recipients** tab.

1. Select an action requested from the **Action Requested** list. To route the document to an individual, select this option in the **Person Requests** section. To send the request to a group, select this option in the **Ad Hoc Group Requests** section.



2. To ad hoc route the document to another person, type the principal name in the **Person** box in the **Ad Hoc Recipients** section or use the lookup icon

to search for the appropriate user name.



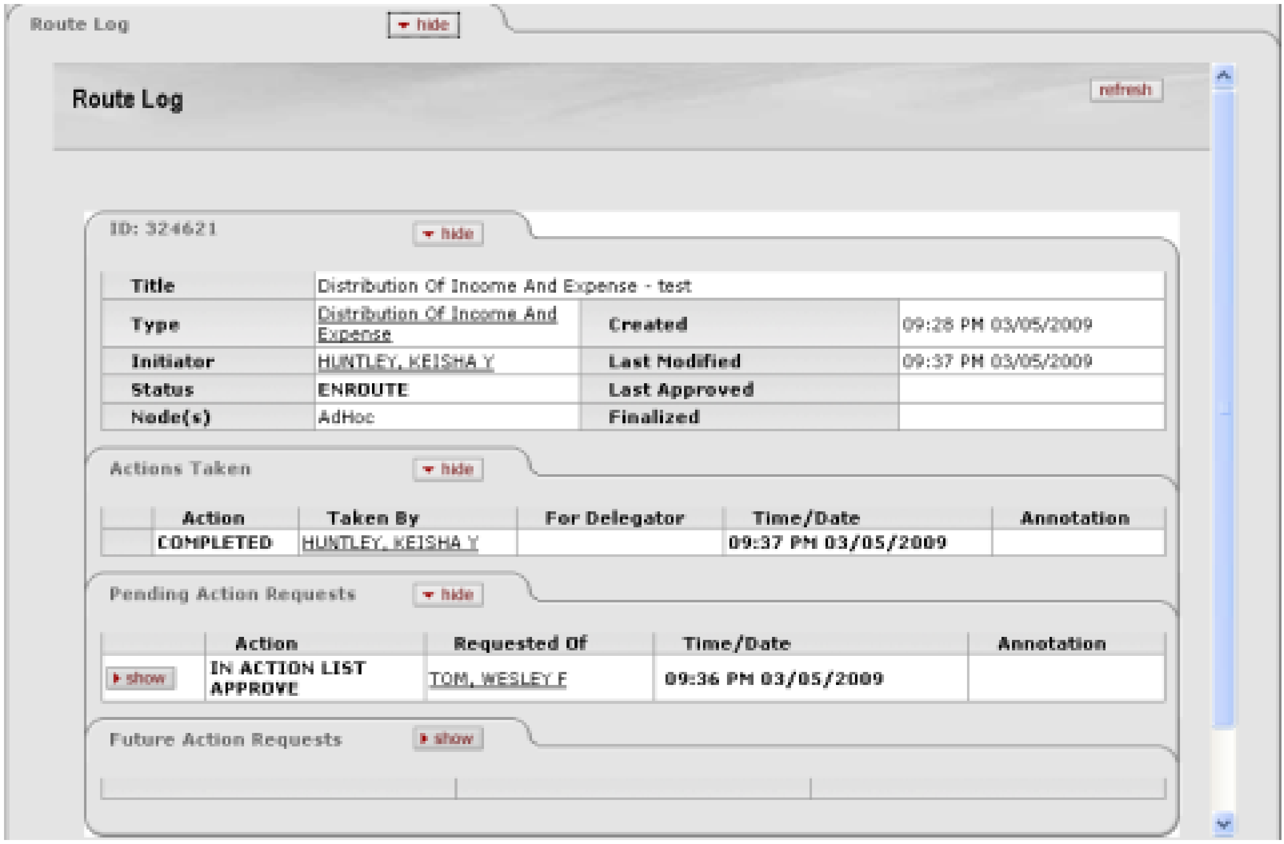
3. To ad hoc route the document to a group, in the **Namespace Code** field in the **Ad Hoc Group Requests** section, enter the group name or use the **Lookup** icon

   to search for the appropriate group name.

4. Click add . The system verifies that the person ID or group namespace code and name that you have entered for routing is valid.

5. Click submit on the document.

   After you complete the **Ad Hoc Recipient** section and submit the document, the system changes the **Node(s)** value to 'Adhoc' and changes the **Status** value to 'ENROUTE'.



The **Pending Action Requests** tab shows the requested action and the user ID.

When a document is en route, you may send ad hoc requests without taking a workflow action on the document. To do this follow the steps listed above but use the 

button instead of **Submit**.

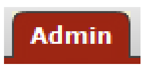
Note

When you review the Route Log immediately after submitting a document, you may not see the **Pending Action Requests** tab. This is because OLE has not yet received the routing information from Workflow. In this case, wait for a few seconds and click the **Refresh** button at the top of the Route Log to refresh the screen. You may need to repeat this process a few times until the information appears in the **Pending Action Requests** tab.

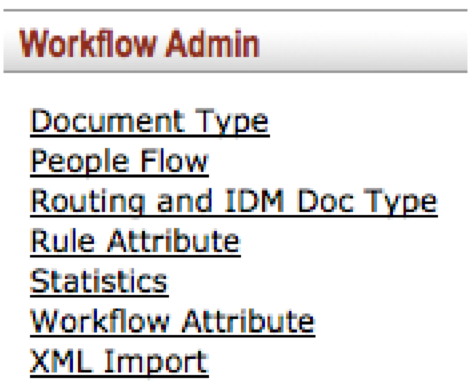
The **Pending Action Requests** tab shows the requested action and the user ID.

Viewing Route Nodes

To see the route nodes associated with a particular document type:

1. Click the  menu tab.

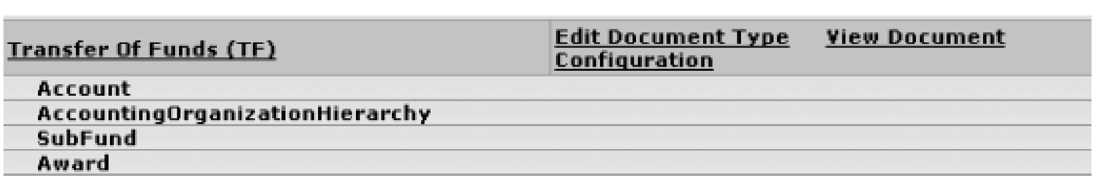
2. Select **Routing & IDM Doc Type** (Routing and Identity Management Document Type Hierarchy) from the **Workflow Admin** submenu.



The system displays document types in the hierarchy.

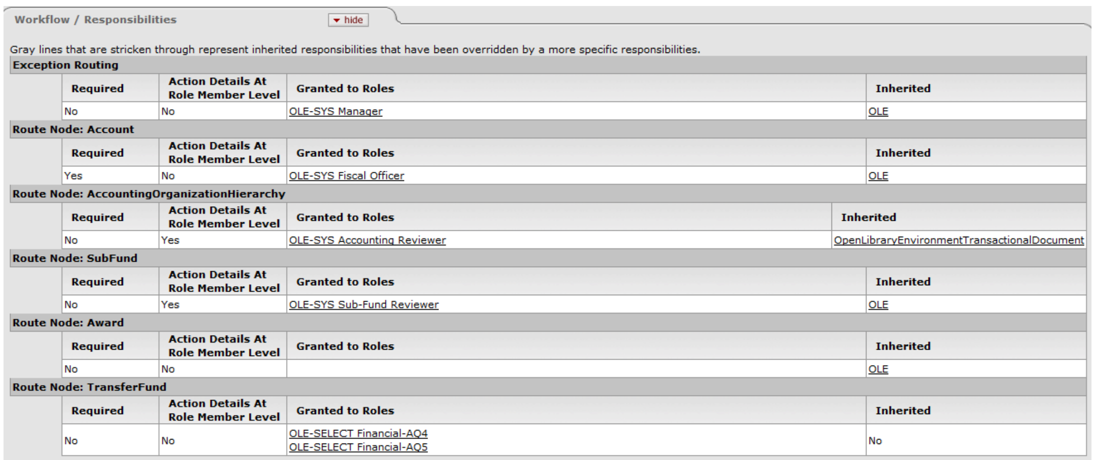
3. Locate the desired document type route levels.

For example, you might scroll down to Transfer of Funds to view the rules of the Transfer of Funds document route levels.



Beneath the document type, you see the nodes that the document routes through. The system lists these nodes in order from first to last. To view more detail about the KIM responsibilities associated with these route nodes, click the **View Document Configuration** link.

4. Scroll down to the **Workflow / Responsibilities** tab.



Workflow / Responsibilities

hide

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

	Required	Action Details At Role Member Level	Granted to Roles	Inherited
Exception Routing				
	No	No	OLE-SYS Manager	OLE
Route Node: Account				
	Yes	No	OLE-SYS Fiscal Officer	OLE
Route Node: AccountingOrganizationHierarchy				
	No	Yes	OLE-SYS Accounting Reviewer	OpenLibraryEnvironmentTransactionalDocument
Route Node: SubFund				
	No	Yes	OLE-SYS Sub-Fund Reviewer	OLE
Route Node: Award				
	No	No		OLE
Route Node: TransferFund				
	No	No	OLE-SELECT Financial-AQ4 OLE-SELECT Financial-AQ5	No

In the **Workflow / Responsibilities** tab, the system displays the name of each route node along with the associated role(s) and other information. The first entry in the list defines the exception routing for this document type. This entry identifies the role that receives the document if Workflow encounters an error that prevents it from completing the document's normal routing.

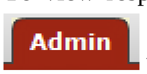
Note

In some cases a document may have route nodes that the document passes through based on certain conditions. These split or branching route nodes are indented to distinguish them from the route nodes through which all documents of this type pass.

Workflow Responsibilities

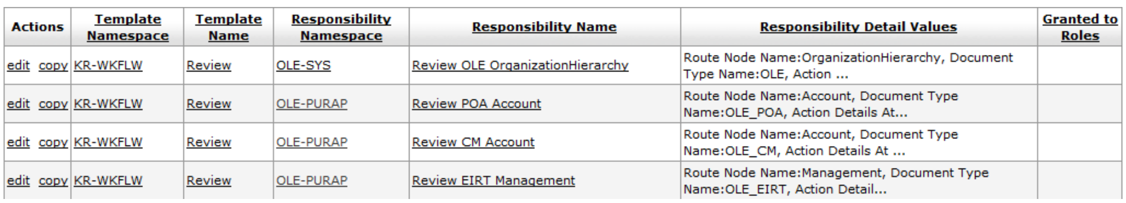
When a document routes through a particular route level, the KEW evaluates it against the responsibilities that reference this document type and route level. A responsibility acts like a trigger: If the document meets its criteria, the system sends an action request to a particular user or group of users.

Responsibilities are associated with roles in KIM. Roles have members or assignees who are represented in the system as persons, groups, or other roles. Users assigned to a role inherit the role's responsibilities, meaning that they receive action requests from Workflow when specified conditions are met.

To view responsibilities, select the **Responsibility** option from the **Identity Admin** submenu on the 

tab.

Each responsibility includes several attributes (that is, values and details) that determine when it is triggered.



Actions	Template Namespace	Template Name	Responsibility Namespace	Responsibility Name	Responsibility Detail Values	Granted to Roles
edit copy	KR-WKFLW	Review	OLE-SYS	Review OLE OrganizationHierarchy	Route Node Name:OrganizationHierarchy, Document Type Name:OLE, Action ...	
edit copy	KR-WKFLW	Review	OLE-PURAP	Review POA Account	Route Node Name:Account, Document Type Name:OLE_POA, Action Details At...	
edit copy	KR-WKFLW	Review	OLE-PURAP	Review CM Account	Route Node Name:Account, Document Type Name:OLE_CM, Action Details At ...	
edit copy	KR-WKFLW	Review	OLE-PURAP	Review EIRT Management	Route Node Name:Management, Document Type Name:OLE_EIRT, Action Detail...	

Responsibilities lookup results Definitions

Title	Description
Responsibility Detail Values	Display-only. Additional detail that identifies the document this responsibility generates action requests for, when the requests are generated and how Workflow handles them. Route Node Name: The point in a document's workflow routing at which this responsibility generates requests. Document Type Name: The name of the document type this responsibility will generate action requests for. Action Details At Role Member Level: A 'True' or 'False' indicator that indicates where the details of this workflow action request are defined. If the value is 'True,' action details are collected when members are assigned to the role. If the value is 'False,' the action details are collected when this responsibility is assigned to a role. Required: A 'True' or 'False' value that indicates whether this responsibility is required to generate an action request or send the document into exception status ('True') or is an optional responsibility and can be bypassed if no action requests are generated ('False').
Responsibility Name	Display-only. 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. Thus most OLE responsibilities have a **Responsibility Name** of 'Review'.
Responsibility Namespace	Display-only. The namespace with which the responsibility is associated. This namespace usually corresponds to the namespace of the document type for which the responsibility generates action requests.
Template Name	Display-only. The name of the template on which the responsibility is based. The template defines, in a broad sense, what the responsibilities based on it do. Since responsibilities usually generate action requests for user review, most responsibilities have a **Template Name** of 'Review'.
Template Namespace Code	Display-only. The namespace for the responsibility template. Usually, the namespace identifies the application and module the applicable responsibility template pertains to. Because responsibilities pertain to

	workflow, most responsibility templates are associated with the **KR-WKFLW** (Kuali Rice-Workflow) namespace.

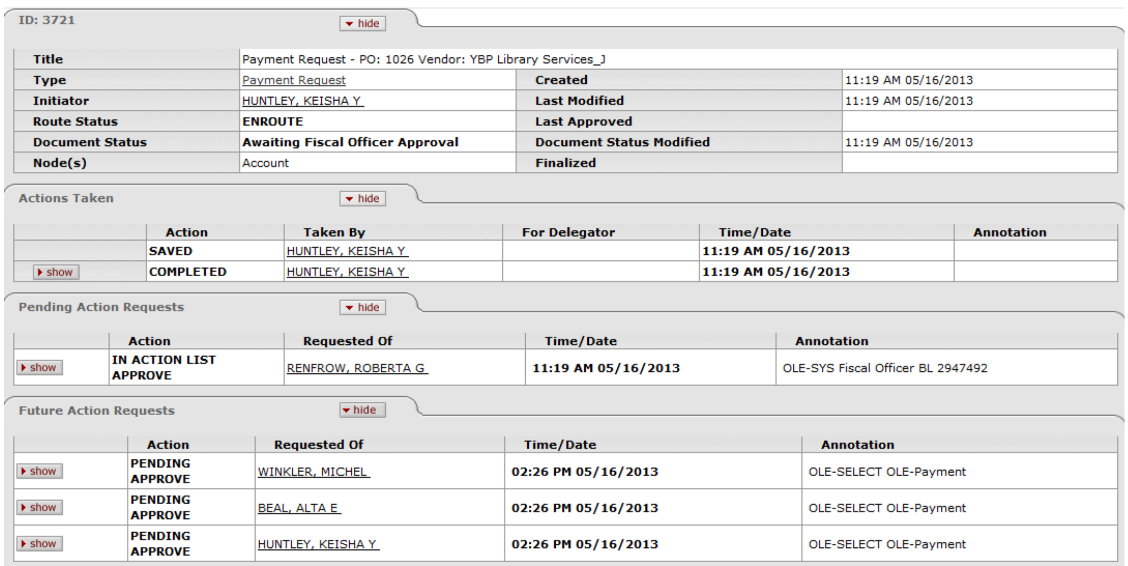
While responsibilities are created and maintained in two central locations, users may supply qualifying values when assigning users to a role associated with these responsibilities. These qualifying values generally identify specific circumstances under which the responsibility is invoked. For example, if a departmental user adds a user to a role with a responsibility that refers to an organization hierarchy route node, the departmental user supplies the appropriate chart and organization code. Subsequently, only documents that contain this chart and organization code route to the specified user.

Note

For more information about roles and responsibilities, see KIM Permissions, Responsibilities, and Roles in the *Guide to OLE System Administration Functions.*

Route Log

The **Route Log** tab displayed on all OLE e-docs shows workflow status details. The **Route Log** can have up to these four subtabs---**Document ID**, **Actions Taken**, **Pending Action Requests**, and **Future Action Requests**.



ID: 3721 hide

Title	Payment Request - PO: 1026 Vendor: YBP Library Services_J		
Type	Payment Request	Created	11:19 AM 05/16/2013
Initiator	HUNTLEY, KEISHA Y	Last Modified	11:19 AM 05/16/2013
Route Status	ENROUTE	Last Approved	
Document Status	Awaiting Fiscal Officer Approval	Document Status Modified	11:19 AM 05/16/2013
Node(s)	Account	Finalized	

Actions Taken hide

	Action	Taken By	For Delegator	Time/Date	Annotation
	SAVED	HUNTLEY, KEISHA Y		11:19 AM 05/16/2013	
show	COMPLETED	HUNTLEY, KEISHA Y		11:19 AM 05/16/2013	

Pending Action Requests hide

	Action	Requested Of	Time/Date	Annotation
show	IN ACTION LIST APPROVE	RENFROW, ROBERTA G	11:19 AM 05/16/2013	OLE-SYS Fiscal Officer BL 2947492

Future Action Requests hide

	Action	Requested Of	Time/Date	Annotation
show	PENDING APPROVE	WINKLER, MICHEL	02:26 PM 05/16/2013	OLE-SELECT OLE-Payment
show	PENDING APPROVE	BEAL, ALTA E	02:26 PM 05/16/2013	OLE-SELECT OLE-Payment
show	PENDING APPROVE	HUNTLEY, KEISHA Y	02:26 PM 05/16/2013	OLE-SELECT OLE-Payment

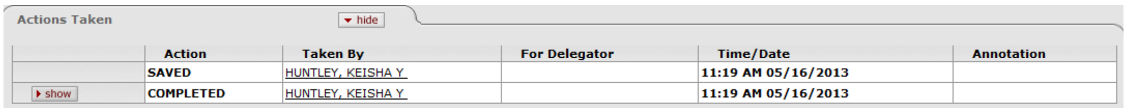
Document ID Tab Definitions

Title	Description
Title	A combination of the document type, description, and the organization document number (if any).
Type	The document type. The full name of the transaction used to identify this document type in Workflow.
Initiator	The name of the person who created the document.
Status	The route status for the document. **Note** For more information, see Route Status.
Node(s)	The current route node of the document -- that is, the current step that the document is on, on its route path. Route nodes are also referred to as 'route levels'.

Created	The time and date that the document was created.
Last Modified	The time and date that the document was modified last.
Last Approved	The time and date that the last action was taken on this document.
Finalized	The time and date that the document reached' Final,' 'Canceled,' or 'Disapproved' status.

Action Taken Tab

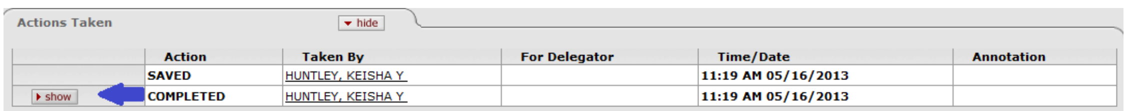
The **Actions Taken** tab displays the history of workflow actions on the e-doc.



This tab lists each action taken, the name of the person who took this action, and the time and date the action was taken. The **For Delegator** field shows the name of a delegate that took action on someone else's behalf. For example, for account routing the fiscal officer's name would be shown here if this person's delegate took action on the document.

To drill down into the details of each action, click 

.



The system displays the detail.

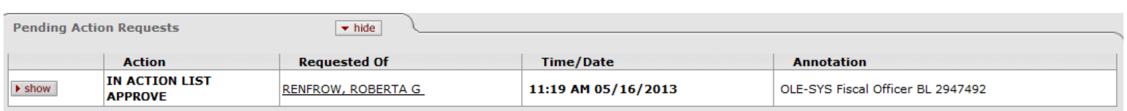
Note

Several layers of information may be available for an action request.

Pending Action Requests Tab

The **Pending Action Requests** tab displays the next action to be taken and shows more detailed routing information about this request. Only action requests at the current route node are displayed.

The following example shows a document that is awaiting approval by one fiscal officers.



The **Action** field indicates whether the document is in a user or group's action list or is pending their approval. An action of **Pending Approve** means Workflow has identified other approval actions needed at this route node, but it has not actually sent these requests yet. Pending approval actions may be determined by the **Priority** attribute on the appropriate workflow responsibilities.

The **Requested Of** field displays the name of the user or group responsible for the pending action. The value in this field is based on the responsibility at this current route level. In cases where a document routes to a role with more than five members the name of the role will be displayed along with any qualifying values pertaining to the role assignees who received the request.

Note that the **Pending Action Requests** tab shows pending requests only for the document at its current route node. The system may add new requests when the document transitions to a new route level.

Tip

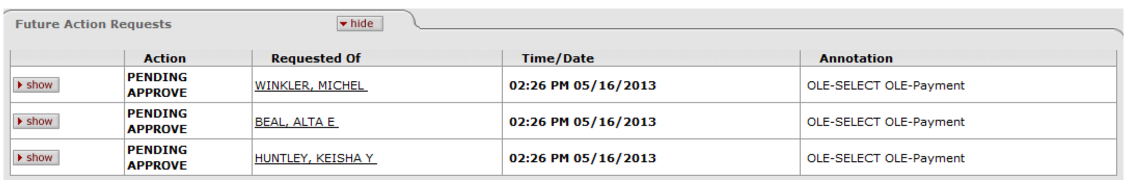
To identify members of a group whose ID is displayed in the **Requested Of** field, click the link for the group ID. The system displays information about the group members.

If multiple users are identified as the recipients of a single action request, the number of actions required is controlled by the action policy code associated with the responsibility that generated the request.

- If this code is set to 'ALL,' all users specified must take the required action on the document before the request will be cleared.
- If the action policy code is 'FIRST,' the first of the specified users to take the action will cause the system to clear the action request for all other users with the same request.

Future Action Requests Tab

When a document's status is 'saved' or 'enroute,' the **Future Action Requests** tab on the **Route Log** shows the action requests that Workflow will generate in the future based on the information currently on the document.



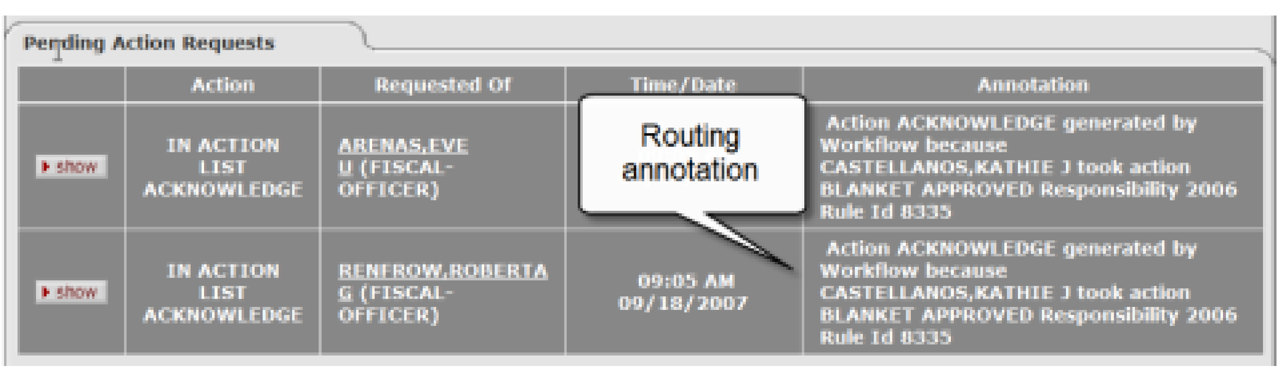
Future Action Requests ▾ hide

	Action	Requested Of	Time/Date	Annotation
▸ show	PENDING APPROVE	WINKLER, MICHEL	02:26 PM 05/16/2013	OLE-SELECT OLE-Payment
▸ show	PENDING APPROVE	BEAL, ALTA E	02:26 PM 05/16/2013	OLE-SELECT OLE-Payment
▸ show	PENDING APPROVE	HUNTLEY, KEISHA Y	02:26 PM 05/16/2013	OLE-SELECT OLE-Payment

To open this section and view the future action requests, click the ▸ show button. Future action requests are listed in the order in which they are to occur.

As a document routes and users take action on it, the system updates the contents of the **Future Action Requests** tab to show only those requests that have not yet been made by Workflow. When a document reaches 'Final' or 'Processed' status in Workflow, this tab becomes empty because there are no future requests to display.

The **Annotation** entry is a message that is generated based on the KIM responsibilities being referenced by Workflow.

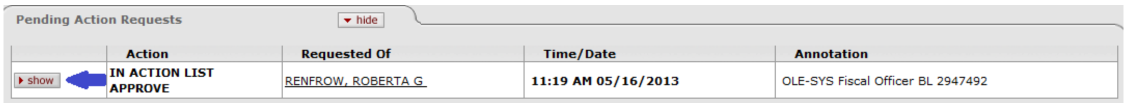


Pending Action Requests

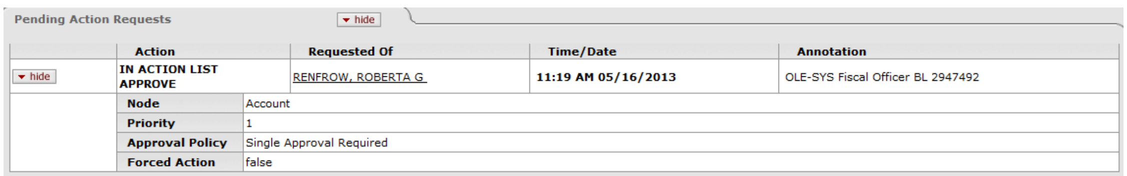
	Action	Requested Of	Time/Date	Annotation
▸ show	IN ACTION LIST ACKNOWLEDGE	ARENAS,EVE U (FISCAL-OFFICER)		Action ACKNOWLEDGE generated by Workflow because CASTELLANOS,KATHIE J took action BLANKET APPROVED Responsibility 2006 Rule Id 8335
▸ show	IN ACTION LIST ACKNOWLEDGE	RENFROW,ROBERTA G (FISCAL-OFFICER)	09:05 AM 09/18/2007	Action ACKNOWLEDGE generated by Workflow because CASTELLANOS,KATHIE J took action BLANKET APPROVED Responsibility 2006 Rule Id 8335

View Routing Details

To display more detailed routing information about the request, click show.



The resulting display contains additional information about the request.

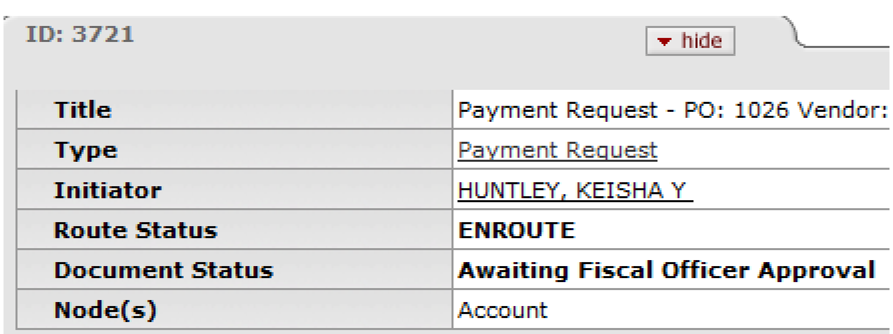


Pending Action Requests Tab Definitions

Title	Description
Node	The route node at which this request was generated.
Priority	The priority assigned to this workflow request. If multiple requests are generated at the same workflow node, the system generates requests with low priority numbers before requests with higher priority numbers.
Approval Policy	A value indicating whether members of a role receiving this request must each take action to fulfill the request or if only a single role member must take action.
Forced Action	A true/false indicator specifying whether a user must take action on this document even if he or she has acted on it previously. If 'True,' then the user must take another action. If 'False,' then the previous action will automatically fulfill this request.

Route Status

Route status indicates where a document is in its routing process. For any given document, the system displays route status in both the **Route Log** tab and the document header.



The following table summarizes the meaning of various route statuses in the KEW.

Route Status Definitions

Status	Description
Approved	The document has been approved. The document is now a valid business transaction in accordance with institutional needs and policies. See note below.
Canceled	The document is denoted as void and should be disregarded. This status is applied to a document when an initiator creates a document and cancels it before submitting it for approval.
Committed	The document has been committed to the database. See note below.
Disapproved	The document has been disapproved by an approver.
Enroute	The document has pending approval requests.
Exception	The document has been routed to an exception queue because workflow has encountered an error when trying to process its routing.
Final	The document has been routed and has no pending approval or acknowledgment requests. Documents in 'Final' status are considered approved in that documents in this status affect the General Ledger or update Chart of Accounts values.
Initialized	The document has been created but has not yet been saved or submitted.
Processed	The document has no pending approval requests but still has one or more pending acknowledgment requests. Processed documents are considered approved, so they impact the General Ledger or update Chart of Accounts values.
Saved	The document has been started but not completed or routed yet. The save action allows the initiator of a document to save his or her work and close the document. The document may be retrieved from the initiator's action list for completion and routing at a later time.

Note

A user does not ordinarily see a Status value of 'Approved' or 'Committed'. The system displays these statuses to users only as a result of a system error or performance issue.

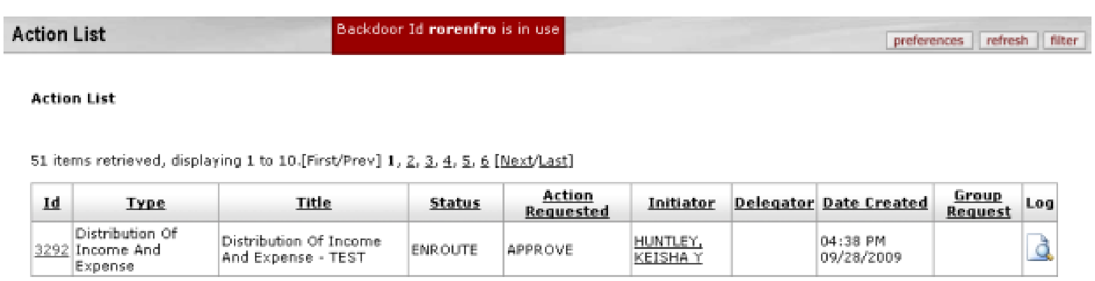
Action List

In OLE, you receive action requests for e-docs through your action list. This list provides summary information about each document that requires your attention, such as document type, title, route status, the type of action requested of you, who initiated the document, when it was created, and whether or not you've received this request because you are a delegate or a member of a group.

1. Click 

.

   The Workflow system retrieves all documents that you have initiated and saved and any documents that are routed to you to approve, acknowledge, or FYI.



2. Click the document **Id** link to open the document.

   The system displays a set of buttons at the bottom of the screen. The buttons you see depend on your role and the requested action. For example, you may see:

3. Click one of the workflow action buttons.

Workflow Action Buttons

When you open a document, you see various workflow action buttons at the bottom of the page. The buttons vary depending on the document you are opening, the kind of action request you have received for the document and the KIM role(s) to which you belong.

Note

Some additional buttons are available, depending on the e-doc you are viewing. These buttons are described within their particular guide.

Workflow Action Button Definitions

Action	Description
acknowledge	Signifies that you have responded to the acknowledgment action request. This button is available only to users to whom a document has been routed for acknowledgment. See FYI below.
approve	Signifies that in your judgment the document represents a valid business transaction in accordance with institutional needs and policies. A single document may require approval from several users, at multiple route levels, before it moves to 'Processed' status.
blanket approve	Bypasses all subsequent levels of approval and immediately moves a document to 'Processed' or 'Final' status. Anyone who would otherwise have received the document for approval receives an acknowledge request instead. This action may be taken only by roles associated with blanket approve document permission, such as the OLE-SYS Manager role.
cancel	Denotes that the document is void and should be disregarded. Canceled documents cannot be modified in any way and do not route for approval.
close	Allows you to exit the document. The system displays a message asking whether you want to save the document before closing. No changes to action requests, route logs or document status occur as a result of a close action. If you initiate a document and close it without saving, it is the same as canceling that document.
copy	Allows you to create a new document based on the existing document. Not all document types can be copied.
disapprove	Signifies that in your judgment the document does not represent a valid business transaction. A disapprove action from any single approver prevents a document from posting to the GL or updating a maintenance table.
error correction	Allows you to correct documents by creating a new document that reverses the original transaction. This feature can be used only on documents that have completed the routing process and have been fully approved. Not all document types are eligible for error correction.
FYI	Signifies that you have responded to the FYI action request. This action is available only to users to whom a document has been routed for FYI.

	The difference between acknowledgment and FYI is that FYI requests can be cleared directly from the action list without opening the document. FYI requests also have a different effect on the document status than acknowledgments. A document with no pending approval requests but with pending acknowledge requests is in 'Processed' status. A document with no pending approval requests but with pending FYI requests is in 'Final' status.
	Refreshes the screen and displays the most recently saved information. Changes that are made but not saved prior to reloading a page are not maintained.
	If you are the initiator of this document, allows you to save your work and close the document. The document may be retrieved from your action list for completion and routing at a later time. If your permissions allow you to edit en route documents, you can also save changes to an en route document in your action list.
	Moves the document (through workflow) to the next level of approval. After a document is submitted, it remains in 'Enroute' status until all approvals have taken place.

Special attention should be paid when you select any of the workflow action buttons noted below.

Blanket Approving a Document

If you are a member of a role with a blanket approve document permission (such as the OLE-SYS Manager role), you have the option to blanket approve a document routed to you for your approval.

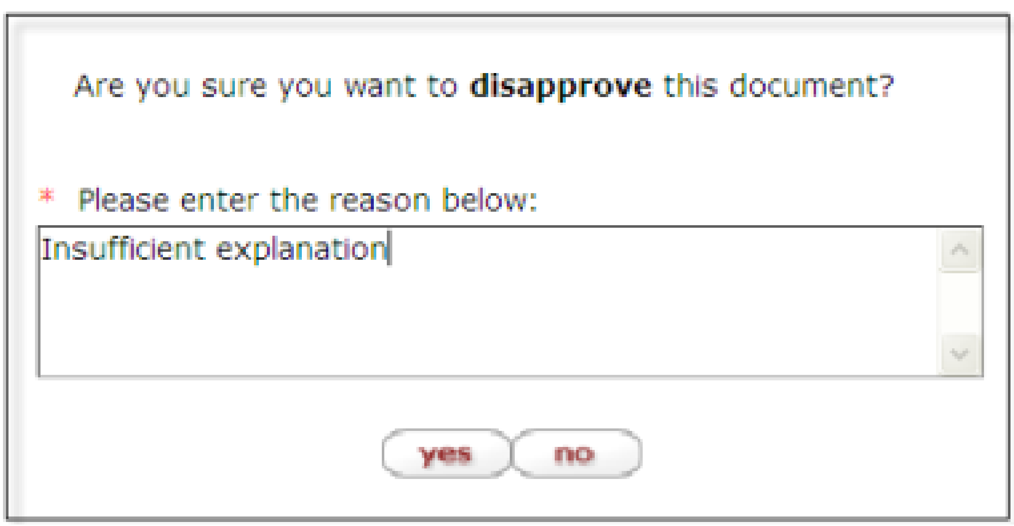
Note that you can only blanket approve a document you are initiating or a document for which you already have an approval request.

Click  to approve the document bypassing all other approvals.

Disapproving a Document

Click  .

Enter a reason for disapproval, and then click **yes** to confirm.



After you complete the disapprove action, the system displays the reason in the **Notes and Attachment** tab.

Acknowledging a Document

Note

Acknowledgments do not interrupt the normal workflow routing of a document. They do not stop a document from routing on to other individuals, groups, or roles who need to take approval actions.

Click 

.

FYI a Document

Note

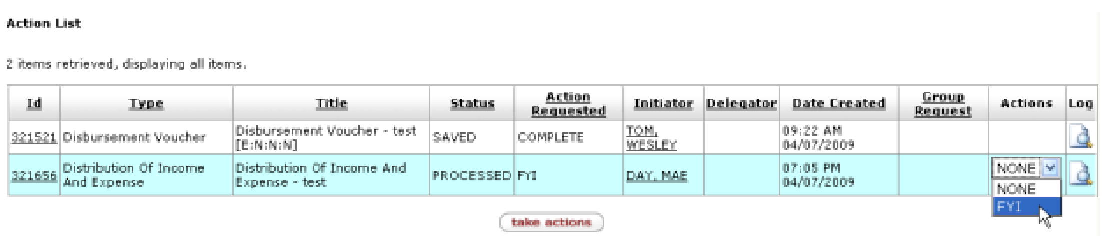
FYIs do not interrupt the normal workflow routing of a document.

To signify that you have responded to the FYI action, you may take either of two actions:

- Click 

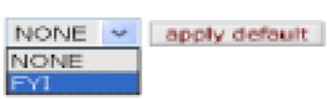
 when you open the document.
- or, in the action list, select 

 in the **Actions** column and click 



Tip

Setting the default action for FYI: To clear all FYI actions in the action list simultaneously, first set the default action from 'NONE' to 'FYI'.



Next, click **apply default** (in the upper right corner) and then click **take actions**.

Correcting Errors After Approval

In financial e-docs, the error correction action allows you to correct documents by creating a new document that reverses the original transaction that has been fully approved. A document created with the error correction action must route and be approved in the same manner as the e-doc it corrects.

Note

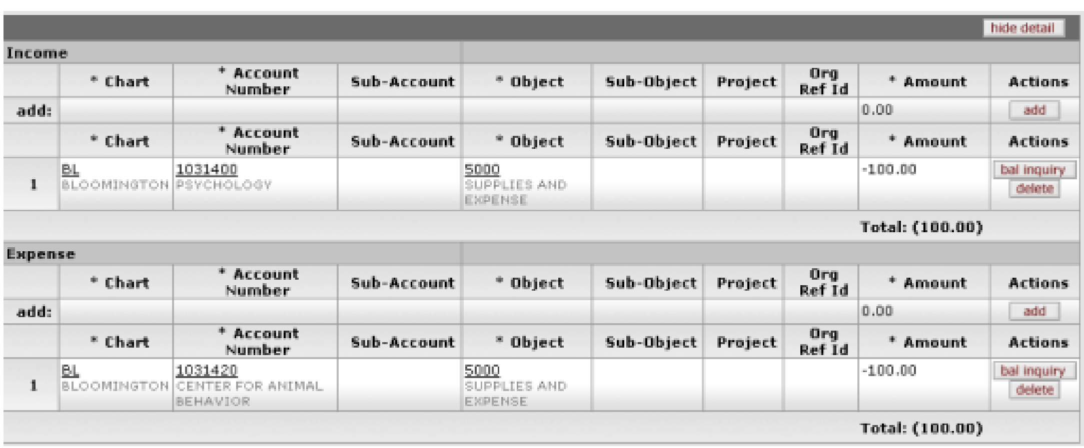
The error correction action should not be confused with the financial transaction document type General Error Correction (GEC), which is described in General Error Correction in the *Guide to the OLE Select and Acquire Module*.

1. Click 

   The system creates a new document with a new document ID. The system also displays **Corrects Document ID** in both the document header and the **Notes and Attachment** tab of the document.

Doc Nbr:	135198	Status:	INITIATED	Corrects Document Id::	135163
Initiator:	VPUTMAN	Created:	01:23 PM 03/27/2006		

Amounts are in negative to reverse the original transaction.



hide detail

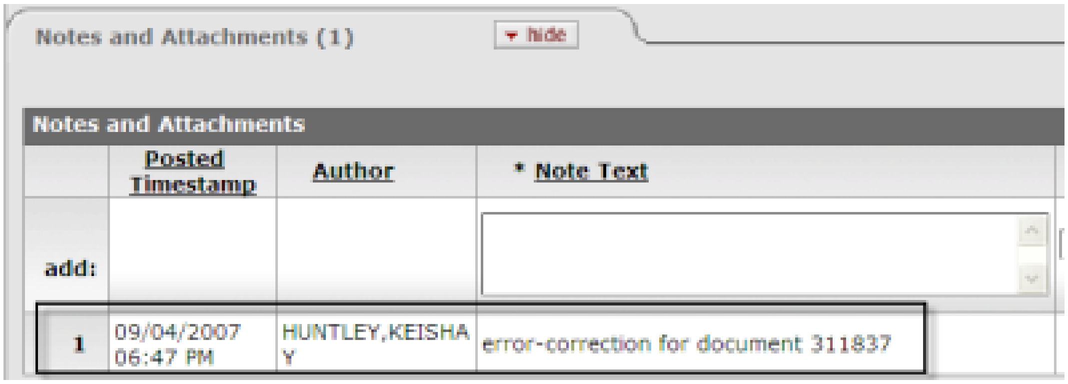
Income

	* Chart	* Account Number	Sub-Account	* Object	Sub-Object	Project	Org Ref Id	* Amount	Actions
add:								0.00	add
1	BL BLOOMINGTON	1031400 PSYCHOLOGY		5000 SUPPLIES AND EXPENSE				-100.00	bal inquiry delete
								Total: (100.00)	

Expense

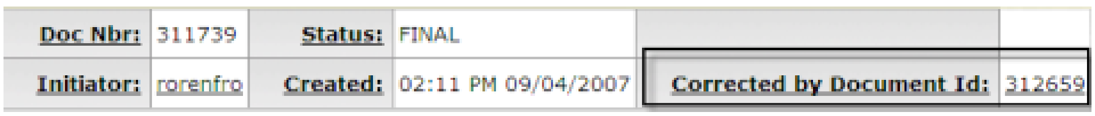
	* Chart	* Account Number	Sub-Account	* Object	Sub-Object	Project	Org Ref Id	* Amount	Actions
add:								0.00	add
1	BL BLOOMINGTON	1031420 CENTER FOR ANIMAL BEHAVIOR		5000 SUPPLIES AND EXPENSE				-100.00	bal inquiry delete
								Total: (100.00)	

The new document has an annotation that is an error correction.



2. Click submit.

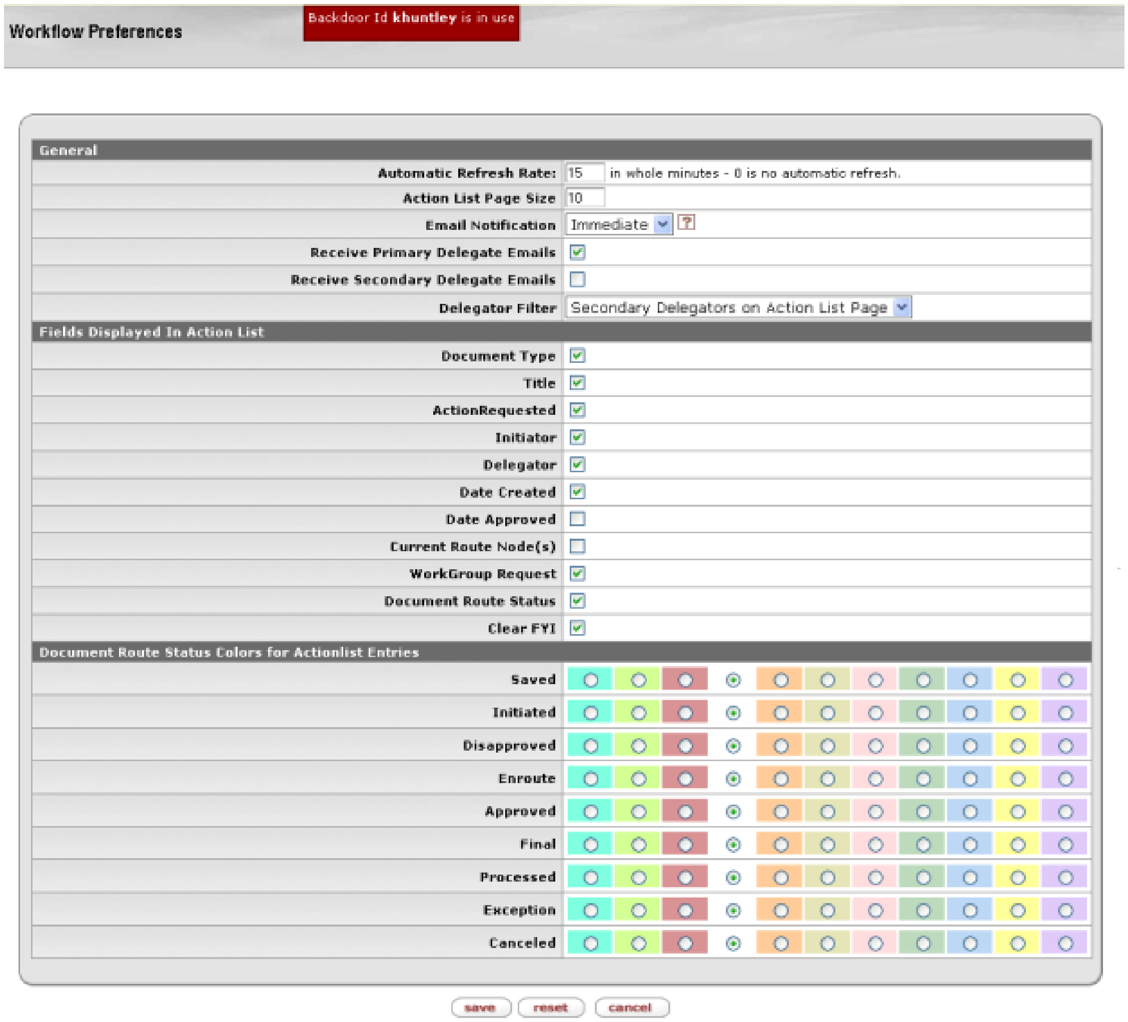
The header of the corrected document shows the corrected by document ID.



Workflow Preferences

The system allows you to change the automatic refresh rate, action list page size, email notification, and row colors that indicate the status of the document. You may also limit the list of documents in the action list by setting filters for delegators or workflow status. To make any of these changes, click the **preferences** button in the action list.

The system displays the Workflow Preferences screen.



Workflow Preferences Field Definitions

Title	Description
Automatic Refresh Rate	Enter a number in whole minutes.
Action List Page Size	Enter a number of rows to display per page in the action list.
Email Notification	Select one of the desired email frequencies from the list: 'None,' 'Daily,' 'Weekly' or 'Immediate'.
Receive Primary Delegates Emails	Check this box to receive an email when a document arrives in your action list for which you are the primary delegate.
Receive Secondary Delegates Emails	Check this box to receive an email when a document arrives in your secondary delegate action list.
Delegator Filter	In the list, select 'Secondary Delegators on Action List' or 'Secondary Delegators only on Filter Page' to specify when to show the secondary delegation entries in your action list.
Fields Displayed in Action List	Check each box to include these items on the action list.
Document Route Status Colors for Action List Entries	Click one of the color options for each document route status.

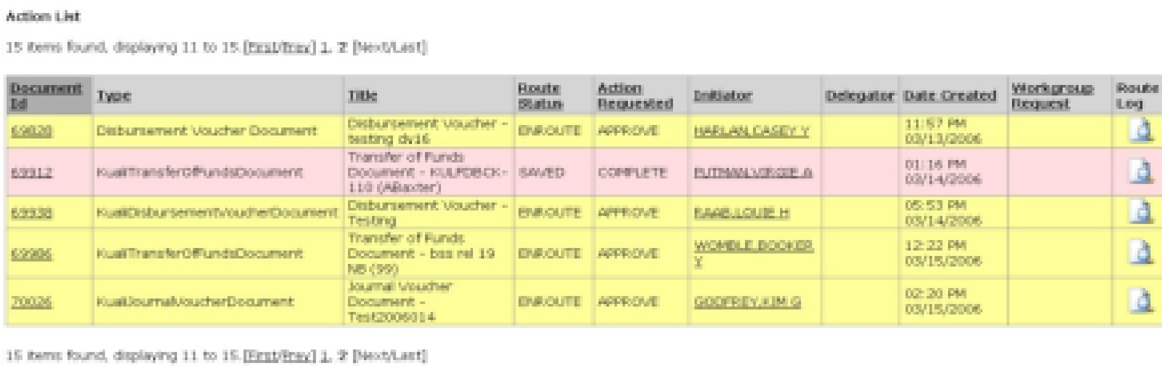
To save your preferences, click 

.

To return to the default preferences, click .

Note

Color changes do not take place until the next time you log onto the system.



Action List

15 items found, displaying 11 to 15 [First/Prev] 1, 2 [Next/Last]

Document Id	Type	Title	Route Status	Action Requested	Initiator	Delegator	Date Created	Workgroup Request	Route Log
69820	Disbursement Voucher Document	Disbursement Voucher - testing dv16	ENROUTE	APPROVE	HARLAN,CASEY Y		11:57 PM 03/13/2006		
69912	KualiTransferOfFundsDocument	Transfer of Funds Document - KULFDBCK-110 (ABaxter)	SAVED	COMPLETE	PUTMAN,VERGIE A		01:16 PM 03/14/2006		
69938	KualiDisbursementVoucherDocument	Disbursement Voucher - Testing	ENROUTE	APPROVE	RAAB,LOUIE H		05:53 PM 03/14/2006		
69986	KualiTransferOfFundsDocument	Transfer of Funds Document - bss rel 19 NB (99)	ENROUTE	APPROVE	WOMBLE,BOOKER Y		12:22 PM 03/15/2006		
70026	KualiJournalVoucherDocument	Journal Voucher Document - Test20060314	ENROUTE	APPROVE	GODFREY,KIM G		02:20 PM 03/15/2006		

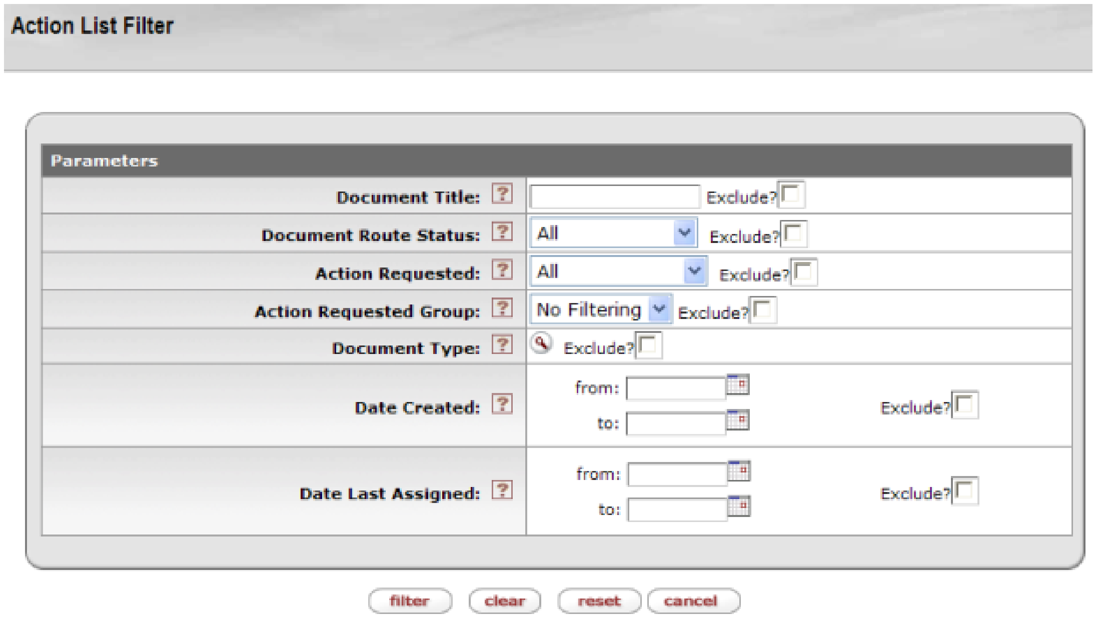
15 items found, displaying 11 to 15 [First/Prev] 1, 2 [Next/Last]

Action List Filter

Setting a filter allows you to display a subset of the action list.

1. To go to the Action List Filter dialog box, click the **Filter** button.

2. Specify filtering criteria in the Action List Filter dialog box.



3. Click .

The system displays a message in the upper left corner.

Action List Filter Definitions

Title	Description
Document Title	Enter a partial or full character string that you are looking for in the document description. For example, enter 'Test' to see all documents that contain 'Test' in the document description. This field is case sensitive. Select the **Exclude?** check box to exclude documents with the specified title from the list.
Document Route Status	Select the route status you want. The choices are 'All,' 'Approved,' 'Disapproved,' 'Enroute,' 'Exception,' 'Processed and Saved'. Select the **Exclude?** check box to exclude documents with the selected status from the list.
Action Requested	Select an action from the list. The choices are 'Acknowledge,' 'Approve,' 'Complete,' and 'FYI'. Select the **Exclude?** check box to exclude documents with the selected action from the list.
Action Requested Group	Select the name of the group that is requested to take an action.
Document Type	Select a document type from the lookup

	. Select the **Exclude?** check box to exclude documents with the selected type from the list.
Date Created	Enter a date range or select dates from the calendar to limit the documents based on the date they were created. Select the **Exclude?** check box to exclude documents that were created during this given time range.
Date Last Assigned	Enter a date range or select dates from the calendar to limit the documents based on the date that this action item was generated for you. Select the **Exclude?** check box to exclude documents that entered your action list during this given time range. The acceptable format is mm/dd/yyyy.

Clearing the Action List Filter

Note

The **Clear Filter** button is visible only when you have previously created the filter.

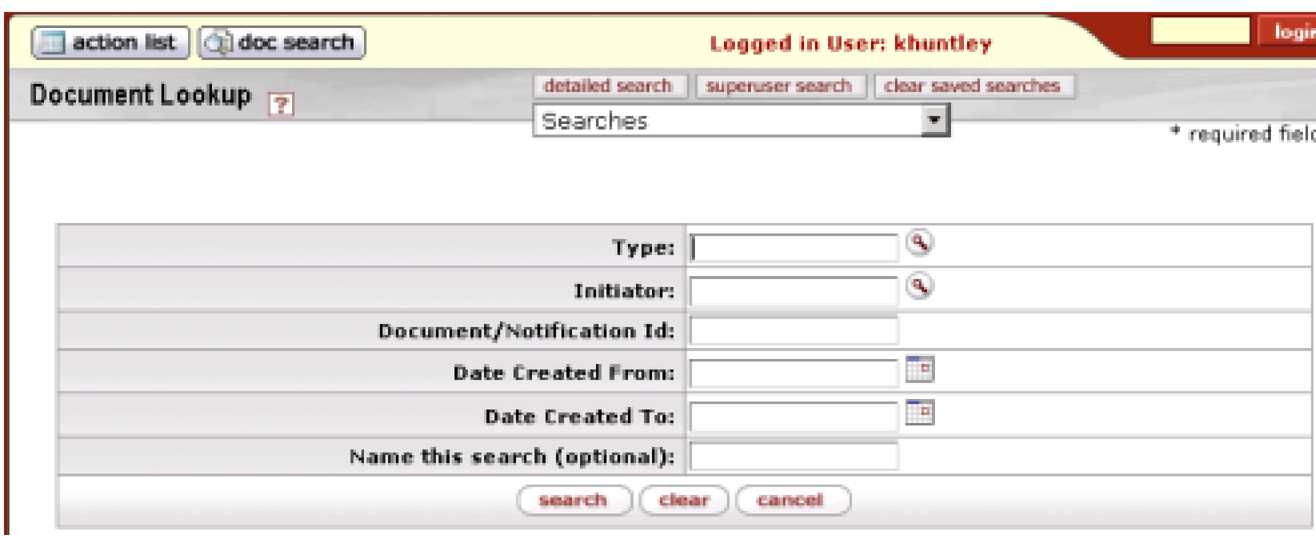
To remove the filter and view the entire list, click the clear filter button.

Advanced Document Searches

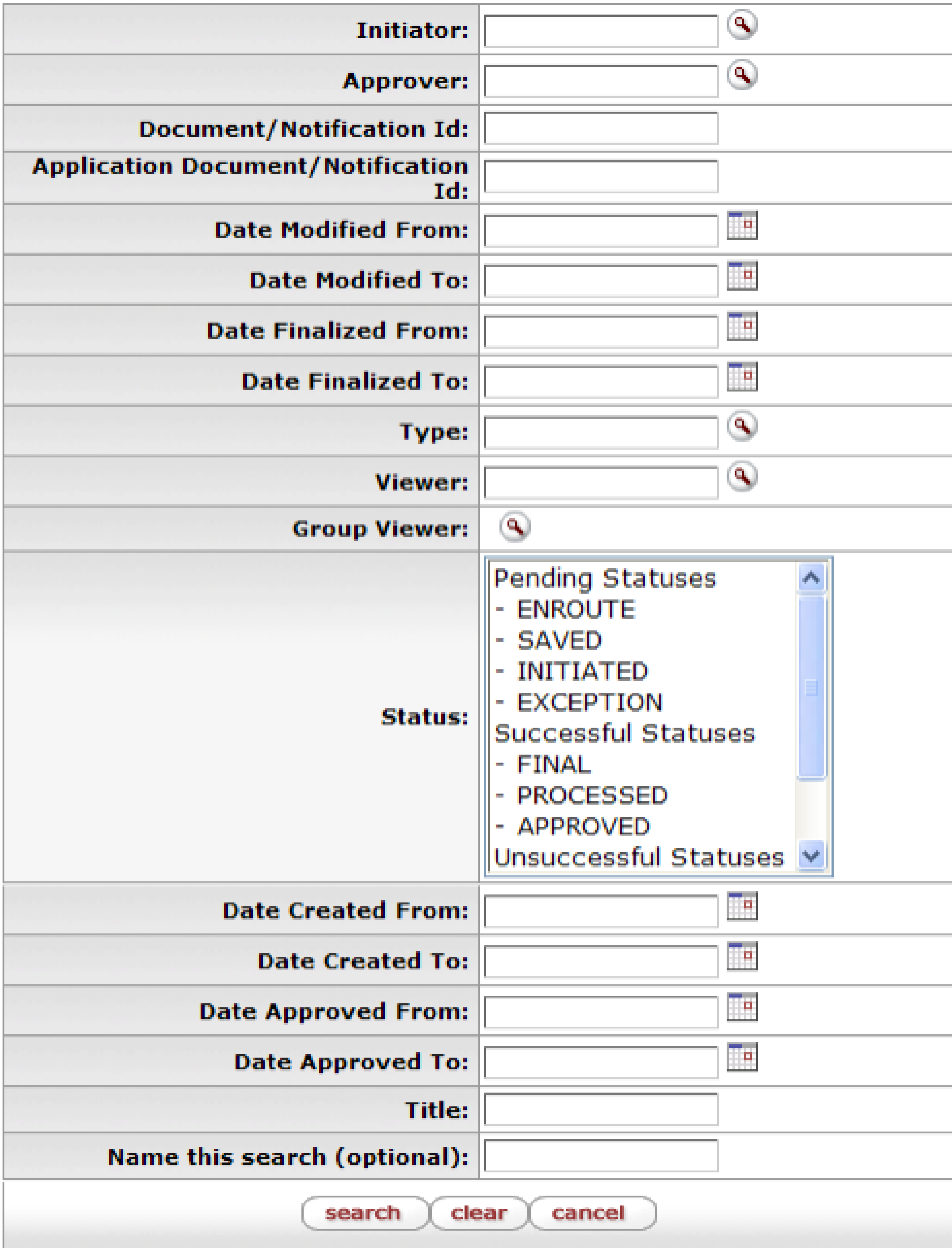
In Using Doc Search to Find a Document, we introduced the basic search capabilities within the KEW. The system also provides more advanced and sophisticated search capabilities.

Detailed Verses Basic Search

When you click the **doc search** button, the system displays a search screen that initially defaults to a basic search.



To switch between the basic search and detailed search, click the **detailed search** or **basic search** button near the top of the screen. The detailed search screen gives you more options for specifying search criteria.

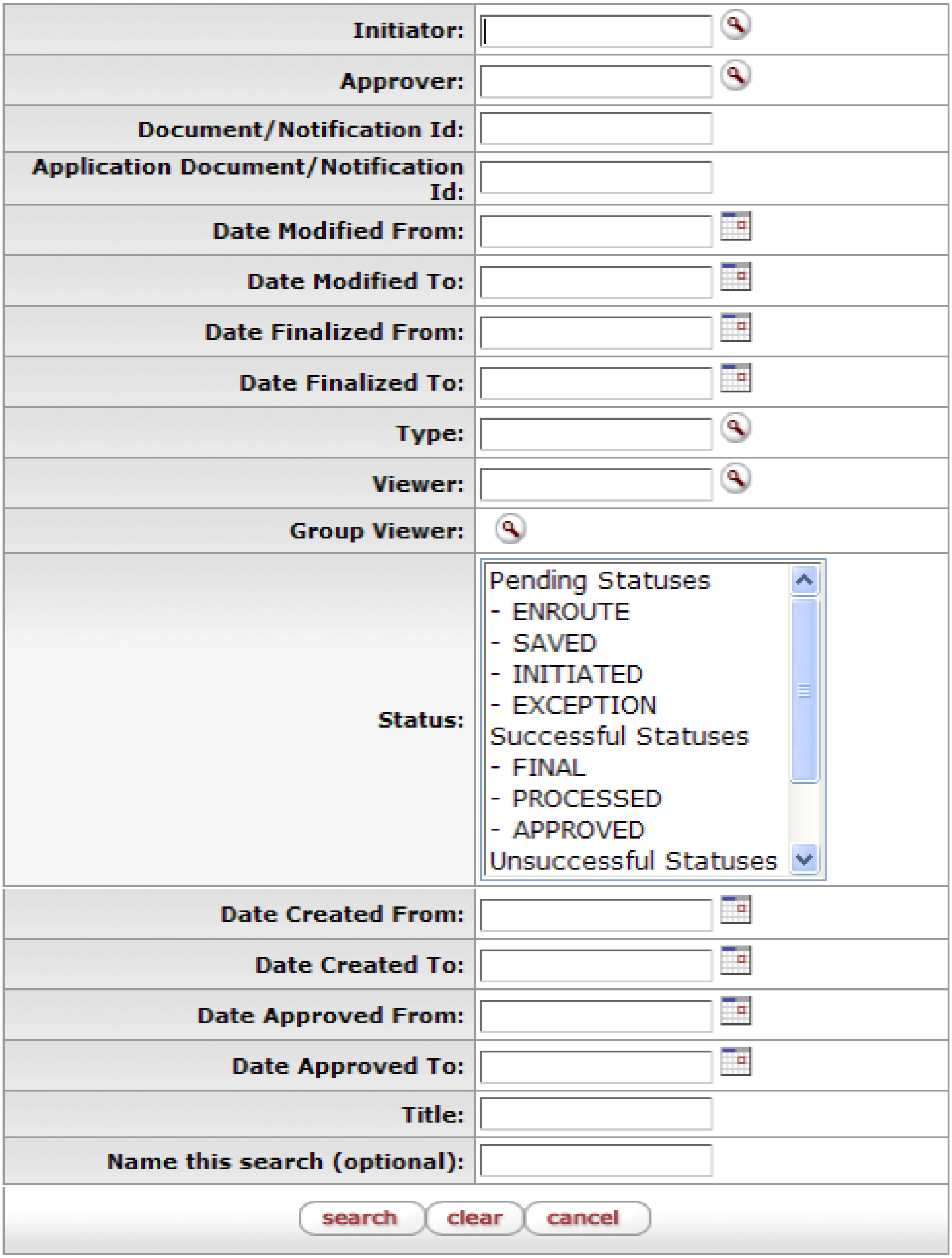


Initiator:	
Approver:	
Document/Notification Id:	
Application Document/Notification Id:	
Date Modified From:	
Date Modified To:	
Date Finalized From:	
Date Finalized To:	
Type:	
Viewer:	
Group Viewer:	
Status:	Pending Statuses - ENROUTE - SAVED - INITIATED - EXCEPTION Successful Statuses - FINAL - PROCESSED - APPROVED Unsuccessful Statuses
Date Created From:	
Date Created To:	
Date Approved From:	
Date Approved To:	
Title:	
Name this search (optional):	

search clear cancel

Superuser Verses Non-Superuser Searches

The search screen initially defaults to a non-superuser search mode. If you are a member of a role (e.g., the OLE-SYS Workflow Administrator role) that has the administer routing for document permission, you may switch between non-superuser search and superuser search mode by clicking the **Superuser Search** or **Non-Superuser Search** link.


Initiator:
Approver:
Document/Notification Id:
Application Document/Notification Id:
Date Modified From:
Date Modified To:
Date Finalized From:
Date Finalized To:
Type:
Viewer:
Group Viewer:
Status:
Pending Statuses
- ENROUTE
- SAVED
- INITIATED
- EXCEPTION
Successful Statuses
- FINAL
- PROCESSED
- APPROVED
Unsuccessful Statuses
Date Created From:
Date Created To:
Date Approved From:
Date Approved To:
Title:
Name this search (optional):
search
clear
cancel

The search screen initially defaults to a non-superuser search mode. If you are a member of a role (e.g., the OLE-SYS Workflow Administrator role) that has the administer routing for document permission, you may switch between non-superuser search and superuser search mode by clicking the **Superuser Search** or **Non-Superuser Search** link.

Note

Anyone can search for documents using superuser search, but only users with an appropriate role can actually take special actions on the documents retrieved by the superuser search function.

Document Specific Searches

Document-specific searches allow you to specify additional criteria when you search specific document types or groups of documents such as financial transactions or purchasing/accounts payable documents. In addition to the standard search criteria available in the basic and advanced searches, document-specific searches allow you to specify fields such as dollar amounts, status, and document-specific reference numbers.

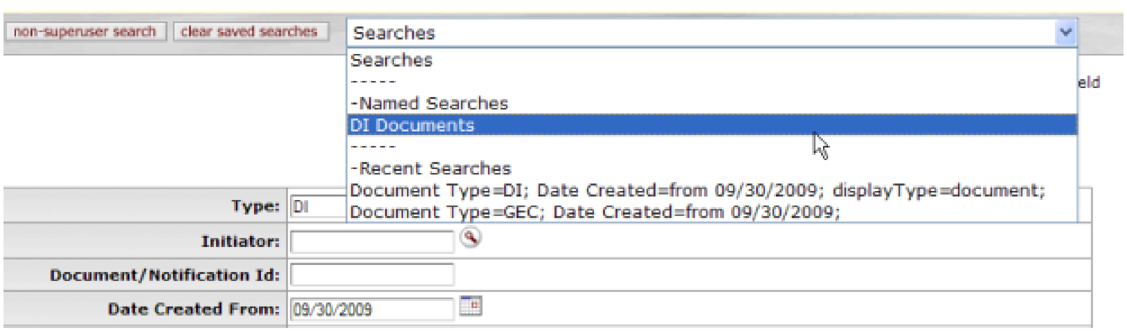
Note

For more information about document-specific search, see the help documentation section on the applicable document type in the appropriate guide listed in the OLE Documentation Portal.

You may also access these search options after you click the doc search button. To access document-specific search at this point, either enter the document type name and tab out of the field or use the **Document Type** lookup . The system displays the appropriate additional search fields.

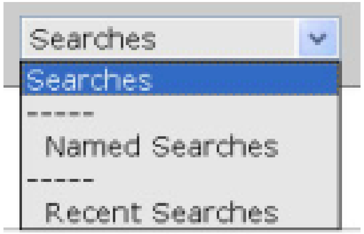
Named Searches

When you name a set of search criteria, the system saves your search as a named search. When you later click **search**, the system displays a list of all named searches you have created in the Searches list.



Clear Saved Searches

To clear all of your named searches, click **clear saved searches**. OLE clears the Searches list.



Clear Searches

To clear your previous search criteria, click 

.

Chapter 5. Importing Data into OLE

OLE allows users to import multiple types of records. In Select/Acquire, financial data can be inverted from spreadsheets (.csv files). Bibliographic records, Orders, Patrons, and Locations can be imported with the **Batch Process** using **Batch Process Profiles**. The first part of this page describes how to import data using templated spreadsheets. The second part gives users sample data to modify and use for batch processing.

Note

For information on importing via the batch process and the batch process profile, please refer to the Guide to the OLE System Administration Module.

Data Import Templates for Select/Acquire

OLE import templates allow you to import any number of accounting lines, endowment transaction lines, purchasing line items, and other types of data from a comma-delimited (.csv) file. This section contains a table that lists types of e-docs for which templates are available in the default system and provides a link to the corresponding template for each document type.

Following the table is a process overview that includes complete instructions for using templates to import multiple lines of data. Additional subsections contain detailed information about each template.

Data import templates by document type

Document Type	Description
Advance Deposits (AD) Disbursement Voucher (DV)	AC_CR_CCR_DV_SB_Import.xls
Budget Adjustment (BA) Year End Budget Adjustment (YEBA)	If an amount is erroneously entered in the **Base Budget Adjustment Amount** column, it is imported to the accounting line of the e-doc. An error is displayed when the data is validated via saving or submitting the e-doc.
Distribution of Income and Expense (DI) Pre-Encumbrance (PE) - encumbrance lines only Transfer of Funds (TF) Year End Distribution of Income and Expense (YEDI) Year End Transfer of Funds (YETF)	DI_YEDI_IB_TF_YETF_PE_Encumbrance_Only_Import.xls
General Error Correction (GEC) Year End General Error Correction (YEGEC)	GEC_YEGEC_Import.xls
Pre-Encumbrance (PE) -disencumbrance lines only	Disencumbrance lines only
Purchase Requisition (REQS) and Purchase Order (PO) account import	PURAP_Account_Import.xls The REQS and PO documents have no **Accounting Lines** tab, but clicking **setup distribution** in the **Items** tab opens an **Accounting Lines** section. This template imports account data into the **Accounting Lines** section.

Process Overview

The **import lines** button is located in the upper right corner of the appropriate tab (for example, the **Accounting Lines** tab). This button allows you to import a .csv file containing multiple lines of data into the tab.

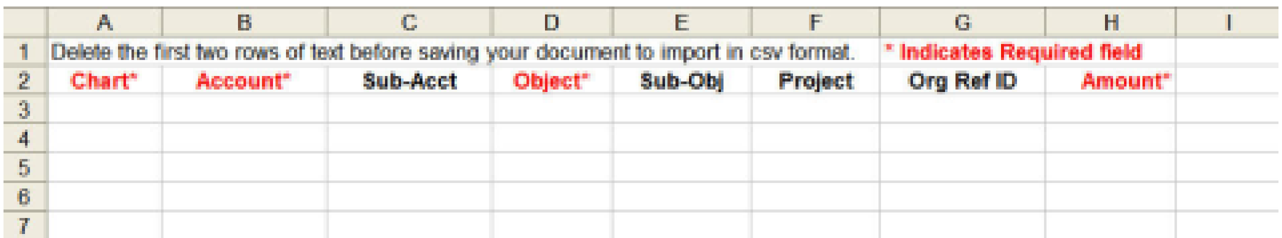
Different types of e-docs use different import templates, but in some cases multiple e-docs use the same template.

Note

The layout and format of the .csv import template files varies by document type. Using the incorrect format for the .csv file causes the import to fail. Note that, for financial transactions, a separate file is needed for each **Accounting Lines** tab section (for example, the **From** and **To** sections).

Creating a .csv File

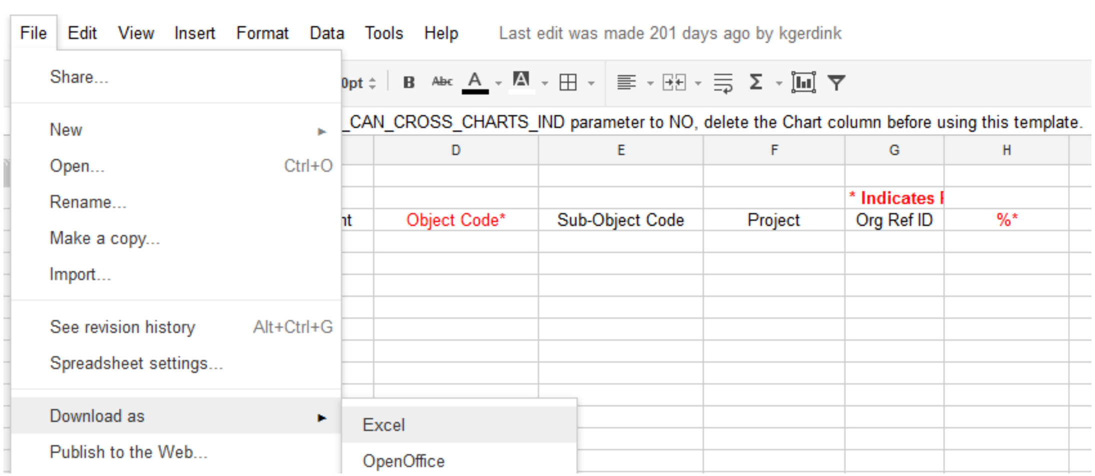
OLE provides a template for each document type (in some cases, multiple document types use the same template), for example:



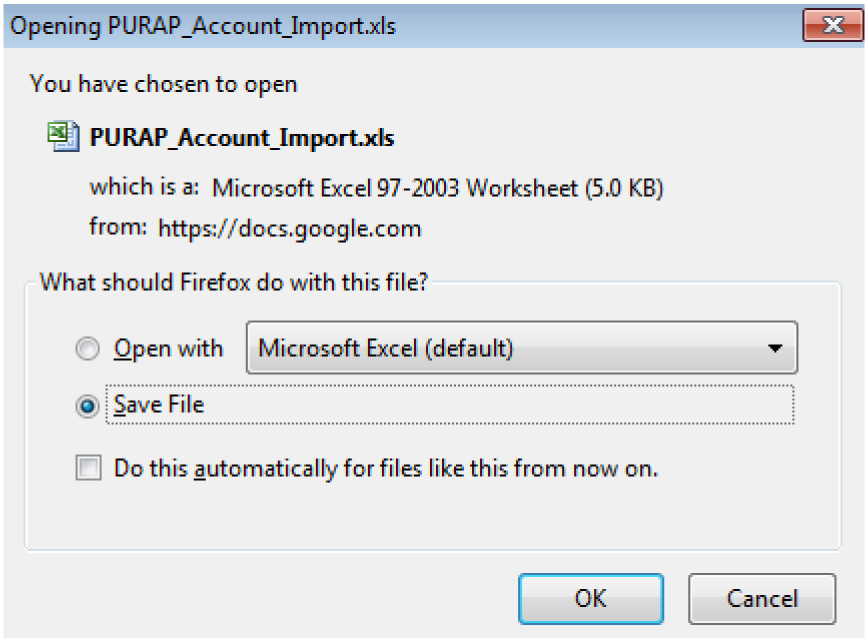
The format of the .cvs file varies depending on the document type. The desired template file for the document may be downloaded from [Google Docs](#) (PURAP_Account_Import, PE_Disencumbrance_only_Import, BA_YEBA_Import).

1. Please find the import rules and format requirements in the [Guide to the OLE Select and Acquire Module](#).

2. **In Google Docs**, open the template file that corresponds to the type of financial transaction document you are working on. You may "Download As" from the File menu of Google Docs to save the template to your desktop, please do not try to edit the document within Google Docs/Drive.



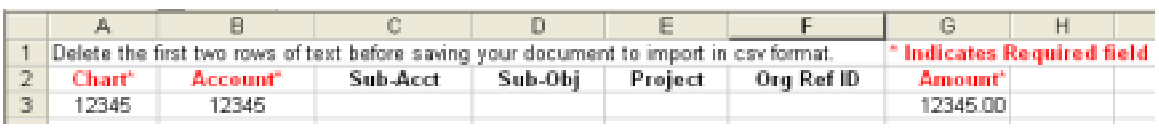
3. Save the template to your computer as an Excel workbook.



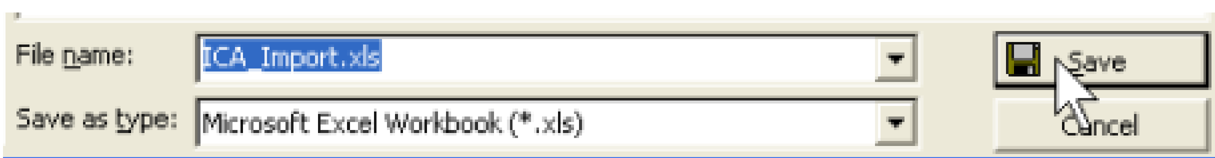
4. Add data to the file.

   ## Note

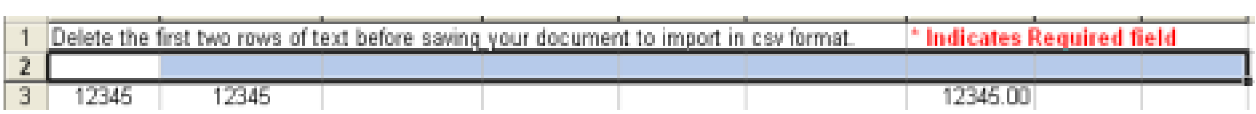
   Required field headings are marked with an asterisk and appear in red.



5. If the file is to be used again in the future, save the file as an Excel workbook (don't delete the headers yet). If the file is not to be used again, skip this step.

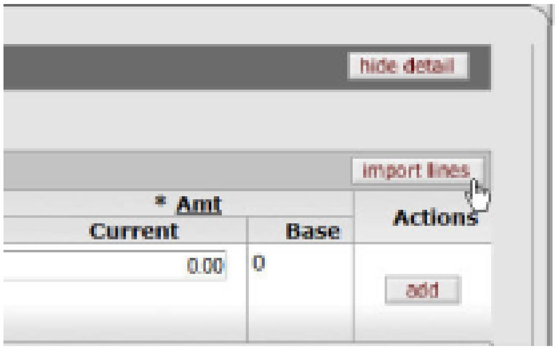


6. Delete the header rows at the top.



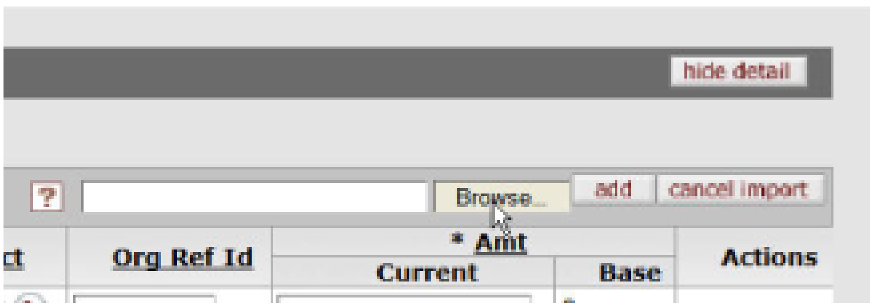
7. Save the file again, with a new name, in .csv format.

8. Click . In OLE the **import lines** button is located in the upper right corner of the applicable tab.



The system displays additional buttons such as **Browse**, **add**, and **cancel import**.

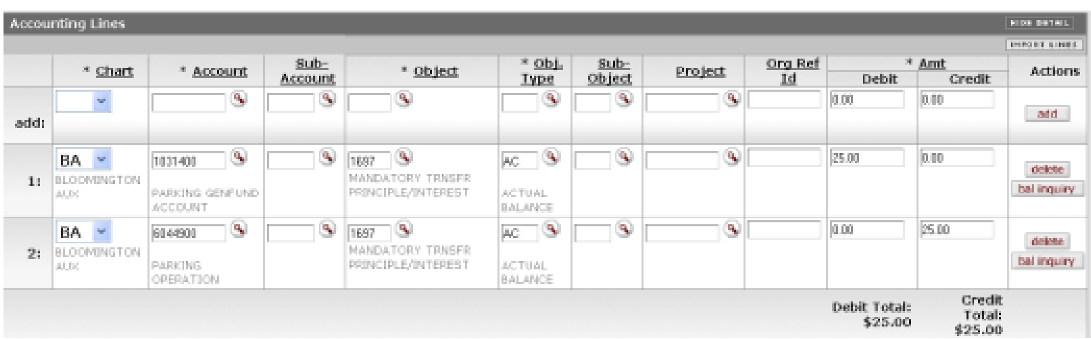
9. Click  and locate the file you have created from your computer.



10. From the Choose File window, select the .csv file to be imported and click 

11. Click .

The screen displays the imported data.



12. When finished, archive or delete the .csv file.

When the file is needed again, follow these instructions:

1. Open the saved Excel workbook with the data from Step 5 above.

2. Edit the file as necessary.
3. Follow steps 6 - 12 above.

AD_CR_CCR_DV_SB_Import.xls

The AC_CR_CCR_DV_SB_Import Google Doc template applies to two OLE document types:

- Advance Deposits Document (AD)
- Disbursement Voucher (DV)

	A	B	C	D	E	F	G	H	I	J	K
1	If your institution has set the ACCOUNTS_CAN_CROSS_CHARTS_IND parameter to NO, delete the Chart column before using this template.										
2	Delete the first three rows of text before saving your document to import in csv format.								* Indicates Required field		
3	Chart*	Account*	Sub-Acct	Object*	Sub-Obj	Project	Org Ref ID	Line Descr.	Amount*		

AD_CR_CCR_DV_SB_Import template format

Column	Field Name
A	Chart Code* **Note** If your institution has set the ACCOUNTS_CAN_CROSS_CHARTS_IND parameter to NO, delete this column before using the template
B	Account Number*
C	Sub-Account Number
D	Object Code*
E	Sub-Object Code
F	Project Code
G	Organization Reference Id
H	Line Description
I	Amount*

BA_YEBA_Import.xls

The BA_YEBA_Import Google Doc template applies to two document types:

- Budget Adjustment
- Year End Budget Adjustment

	A	B	C	D	E	F	G	H	I	J	K
1	If your institution has set the ACCOUNTS_CAN_CROSS_CHARTS_IND parameter to NO, delete the Chart column before using this template.										
2	Delete the first four rows of text before saving your document to import in csv format.							*Indicates Required Field			
3								Cur Budget	Base Budget	Month 1	Month 2
4	Chart*	Account*	Sub-Acct	Object*	Sub-Obj	Project	Org Ref ID	Adj Amt*	Adj Amt	Budg Amt	Budg Amt
5											
6											

L	M	N	O	P	Q	R	S	T	U
Month 3 Budg Amt	Month 4 Budg Amt	Month 5 Budg Amt	Month 6 Budg Amt	Month 7 Budg Amt	Month 8 Budg Amt	Month 9 Budg Amt	Month 10 Budg Amt	Month 11 Budg Amt	Month 12 Budg Amt

BA_YEBA_Import template format

Column	Field Name
A	Chart Code* **Note** If your institution has set the ACCOUNTS_CAN_CROSS_CHARTS_IND parameter to NO, delete this column before using the template
B	Account Number*
C	Sub-Account Number
D	Object Code*
E	Sub-Object Code
F	Project Code
G	Organization Reference Id
H	Current Budget Adjustment Amount*
I	Base Budget Adjustment Amount
J	Month 1 Budget Amount
K	Month 2 Budget Amount
L	Month 3 Budget Amount
M	Month 4 Budget Amount
N	Month 5 Budget Amount
O	Month 6 Budget Amount
P	Month 7 Budget Amount
Q	Month 8 Budget Amount
R	Month 9 Budget Amount
S	Month 10 Budget Amount
T	Month 11 Budget Amount
U	Month 12 Budget Amount

Note

If an amount is erroneously entered in the Base Budget Adjustment Amount column, it is imported to the accounting line of the e-doc. An error is displayed when the data is validated via saving or submitting the e-doc.

DI_YEDI_IB_TF_YETF_PE_Encumbrance_Only_Import.xls

The DI_YEDI_IB_TF_YETF_PE_Encumbrance_only_Import Google Doc template applies to several document types.

- Distribution of Income and Expense (DI)
- Pre-Encumbrance - encumbrance lines only
- Transfer of Funds (TF)
- Year-End Distribution of Income and Expense (YEDI)
- Year-End Transfer of Funds (YETF)

The basic format of the template is shown below.

	A	B	C	D	E	F	G	H	I
1	If your institution has set the ACCOUNTS_CAN_CROSS_CHARTS_IND parameter to NO, delete the Chart column before using this template.								
2	Delete the first three rows of text before saving your document to import in csv format.					* Indicates Required field			
3	Chart*	Account*	Sub-Acct	Object*	Sub-Obj	Project	Org Ref ID	Line Descr.	Amount*

DI_YEDI_IB_TF_YETF_PE_Encumbrance_Only_Import template format

Column	Field Name
A	Chart Code* **Note** If your institution has set the ACCOUNTS_CAN_CROSS_CHARTS_IND parameter to NO, delete this column before using the template
B	Account Number*
C	Sub-Account Number
D	Object Code*
E	Sub-Object Code
F	Project Code
G	Organization Reference Id
H	Line Description
I	Amount*

GEC_YEGEC_Import.xls

The GEC_YEGEC_Import Google Doc template applies to the General Error Correction and Year End General Error Correction document types. The basic format of the template is shown below.

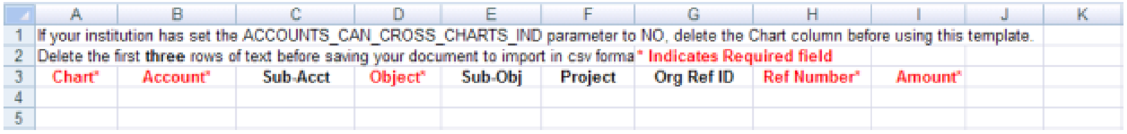
	A	B	C	D	E	F	G	H	I	J	K
1	If your institution has set the ACCOUNTS_CAN_CROSS_CHARTS_IND parameter to NO, delete the Chart column before using this template.										
2	Delete the first three rows of text before saving your document to import in csv format.							* Indicates Required field			
3	Chart*	Account*	Sub-Acct	Object*	Sub-Obj	Project	Org Ref ID	Ref Origin Code*	Ref Number*	Line Descr	Amount*

GEC_YEGEC_Import template format

Column	Field Name
A	Chart Code* **Note** If your institution has set the ACCOUNTS_CAN_CROSS_CHARTS_IND parameter to NO, delete this column before using the template
B	Account Number*
C	Sub-Account Number
D	Object Code*
E	Sub-Object Code
F	Project Code
G	Organization Reference Id
H	Reference Origin Code*
I	Reference Number*
J	Line Description
K	Amount*

PE_Disencumbrance_Only_Import.xls

The [PE_Disencumbrance_only_Import Google Doc] template applies to the Pre-Encumbrance (disencumbrance lines only) document type. The basic format of the template is shown below.



	A	B	C	D	E	F	G	H	I	J	K
1	If your institution has set the ACCOUNTS_CAN_CROSS_CHARTS_IND parameter to NO, delete the Chart column before using this template.										
2	Delete the first **three** rows of text before saving your document to import in csv forma						* Indicates Required field				
3	Chart*	Account*	Sub-Acct	Object*	Sub-Obj	Project	Org Ref ID	Ref Number*	Amount*		
4											
5											

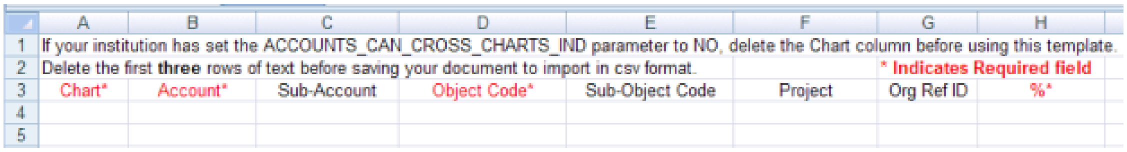
PE_Disencumbrance_Only_Import template format

Column	Field Name
A	Chart Code* **Note** If your institution has set the ACCOUNTS_CAN_CROSS_CHARTS_IND parameter to NO, delete this column before using the template
B	Account Number*
C	Sub-Account Number
D	Object Code*
E	Sub-Object Code
F	Project Code
G	Organization Reference Id
H	Reference Number*
I	Amount*

PURAP_Account_Import.xls

The [PURAP_Account_Import Google Doc] template applies to both the Requisition document type and the Purchase Order document type. It is used to import accounting lines into a requisition or purchase order.

The basic format of the template is shown below.



	A	B	C	D	E	F	G	H
1	If your institution has set the ACCOUNTS_CAN_CROSS_CHARTS_IND parameter to NO, delete the Chart column before using this template.							
2	Delete the first **three** rows of text before saving your document to import in csv format.						* Indicates Required field	
3	Chart*	Account*	Sub-Account	Object Code*	Sub-Object Code	Project	Org Ref ID	%*
4								
5								

PURAP_Account_Import template format

Column	Field Name
A	Chart Code* **Note** If your institution has set the ACCOUNTS_CAN_CROSS_CHARTS_IND parameter to NO, delete this column before using the template
B	Account Number*
C	Sub-Account Number

D	Object Code*
E	Sub-Object Code
F	Project Code
G	Organization Reference Id
H	%*

Sample Data

The **Batch Process** on the **Admin** tab, along with the **Batch Process Profile**, allows OLE users to import several types of records into OLE.

Note

To learn more about Batch Process and the Profile, see the Batch Processes section of the OLE Guide to System Administration.

Patron

Patron Sample Data - singlePatron.xml

Patron Schema - Patron v2.xsd.xml

Circulation

Circulation loan policy - deliver.xml (Not imported via Batch Process but XML Import)

Location

Location Sample Data from IU - iu librariesSampleLocations.xml

OLE Glossary of Terms

Numerical Terms

3rd Party Component	a reusable service, not developed or supplied by OLE that fulfils an OLE library business process.

A

AACR2	AACR2 stands for Anglo-American Cataloguing Rules, Second Edition. Principles of AACR include cataloging from the "item 'in hand" rather than inferring information from external sources and using the "item in hand" as the preferred source of information when conflicts exist. To be superseded by RDA.
Acceptance Criteria	What are the conditions of satisfaction for this user story? Acceptance criteria can be phrased in the form of a question and answer for the testers to use as a test-script to see if the designed system satisfactorily completes the actions specified in the User Story.
Acceptance Testing, UAT	Acceptance Testing or User Acceptance Testing - Tests that can be applied to determine successful outcome of a process, such as User Story or Workflow.
Account	Identifies a pool of funds assigned to a specific university organizational entity for a specific purpose. Global document functionality is available for this document.
Acquire Entity	an OLE component whereby an entity is selected, obtained and the license/registry terms associated with the entity are documented; the entity is described and added to the collection.
Acquisitions	The functions, policies and processes by which a library purchases or licenses materials for its collections; manages the the budget for this function; and identifies purchases made with endowed funds.
Action	In KRMS, an action is the event that is triggered within a rule when the terms of the proposition are met.. See Also Rule, Proposition.
Action List	A list of the user's notification and workflow items. Also called the user's Notification List. Clicking an item in the Action List displays details about that notification, if the item is a notification, or displays that document, if it is a workflow item. The user will usually load the document from their Action List in order to take the requested action against it, such as approving or acknowledging the document.
Action Request	A request to a user or Workgroup to take action on a document. It designates the type of action that is requested, which includes: • Approve: requests an approve or disapprove action. • Complete: requests a completion of the contents of a document. This action request is displayed in the Action List after the user saves an incomplete document.

	• Acknowledge: requests an acknowledgment by the user that the document has been opened - the doc will not leave the Action List until acknowledgment has occurred; however, the document routing will not be held up and the document will be permitted to transaction into the processed state if neccessary. • FYI: a notification to the user regarding the document. Documents requesting FYI can be cleared directly from the Action List. Even if a document has FYI requests remaining, it will still be permitted to transition into the FINAL state.
Active Directory	Authentication: Directory service created by Microsoft and relies on standards of LDAP
Active Indicator	An indicator specifying whether an object in the system is active or not. Used as an alternative to complete removal of an object.
Address	An address is a way to contact a patron. Addresses have dates to indicate when they can be used and types to indicate what they are used for. A subset of the patron's addresses are primary. Primary addresses are used to contact the patron.
Ad hoc Routing	A type of routing used to route a document to users or groups that are not in the Routing path for that Document Type. When the Ad Hoc Routing is complete, the routing returns to its normal path.
Admininstrative site	A web interface for librarians to manage various elements of the look and feel of a platform for their users. Data entered here include ip addresses, library contact information, library logos, and links to the library's catalog and help service, and sometimes the ability to customize site searching and results sorting, among other administrativa. There may be a separate site for retrieving usage statistics or usage statistics may be available from the administrative site.
Affiliation (patron)	Patron groups defined by a library, e.g., "History Dept.","Research Institute", etc. used primarily for statistical purposes.
Agenda	In KRMS, the agenda is a plan for the execution of rules. Agendas can be set as a decision tree or as a sequential list. Agendas are contained within a Context. See Also Rule, Context.
Agent	Any individual or organization entity that is represented in Kuali OLE. An agent could be an institution, a staff member, a library consortia, a publisher, a provider, or an individual working for a publisher / vendor.
Agreement	An agreement or understanding between the library / institution and a publisher / provider / donor regarding access to content. May include descriptive metadata, such as start date, end date, and contract number, as well as information about rights, restrictions, and business terms. An agreement will often represent either a negotiated license or a SERU agreement, although it could conceivably also represent other types of agreements, such as restrictions surrounding use of digital materials deposited in an institutional repository, use of donations made to a special collections unit, or use of gifts to the institution.
Agreement Document	A file associated with an Agreement in OLE. Many types of files are utilized in the negotiation process / provide further details about an Agreement, including a variety of word processing files, spreadsheet files, and pdfs.
AJAX	AJAX, short for Asynchronous JAvascript + XML, is a group of interrelated Web development techniques used on the client-side to create asynchronous web

	applications. With AJAX, web applications can send data to, and retrieve data from, a server asynchronously (in the background) without interfering with the display and behavior of the existing page.
Allocations	This is the primary area in which the ILS accounting is more granular and specific than at the parent organization level. A university will commonly budget operating funds for library acquisitions in one lump sum. The library then commonly subdivides that money into smaller chunks, according to the perceived needs of its users. The most common ways to subdivide the collection budget are: by school or administrative unit -- $x for the School of Medicine, for instance, $X for the School of Arts and Sciences, $X for the Business School, etc.; by subject -- with the library deciding how many subject funds to subdivide the money into; by material type -- dividing the budget among monographs, print serials, e-serials, other e-resources, rare material, etc.; or by combinations of these categories.
American Library Association (ALA)	“The object of the American Library Association shall be to promote library service and librarianship.” The stated mission is, “To provide leadership for the development, promotion, and improvement of library and information services and the profession of librarianship in order to enhance learning and ensure access to information for all.”
Analytic	A bibliographic record for an individual work in a monographic series. Alternatively, a bibliographic record for an article in a journal or newspaper, or for a chapter in a book. Analytics for monographic series are common in libraries. Analytics for journal articles or book chapters are much less common. Sometimes called "analytic entry".
Analytic Holding Record	A holdings record for an individual work in a monographic series (distinguished from a holdings record for the entire series. See Also Series Holding Record.
Analyzed series	A group of titles on related topics issued over time in which each individual work can be identified by two titles: the series title and the title of the individual work (as a volume of the seris title). The series title has its own bib record and each individual title has its own bib record as well, with the two sharing item-level data.
Apache Lucene	Apache Lucene(TM) is a high-performance, full-featured text search engine library written entirely in Java. It is a technology suitable for nearly any application that requires full-text search, especially cross-platform.
Approval order	A library's tentative commitment to purchase a title. See Also Approval Plan.
Approval Plan	An arrangement between a supplier (e.g., a "book jobber") and a library whereby the supplier automatically ships materials of certain kinds, of certain types, on certain subjects, etc. as profiled by the library; when received, the library has the option of keeping (and paying) or rejecting (and returning) any individual title. Approval plan shipments are often accompanied by a file of records from the supplier that include the bib, item/holdings, order and/or invoice data for the titles; this data is loaded into a library's system using a locally-defined import profile.
Approve	A type of workflow action button. Signifies that the document represents a valid business transaction in accordance with institutional needs and policies in the user's judgment. A single document may require approval from several users, at multiple route levels, before it moves to final status.

API	An Application Programming Interface (API) specifies a software component in terms of its operation, their inputs and outputs and underlying types. Its main purpose is to define a set of functionalities that are independent of their respective implementation, allowing both definition and implementation to vary without compromising each other.
AquaBrowser	The AquaBrowser® discovery layer provides a fresh, modern interface for patrons of varied backgrounds to use independently. By providing a simple interface with a single search box, patrons are able to quickly find relevant results when they need them. A fully hosted, subscription-based solution, AquaBrowser 3 significantly enhances service quality with minimal impact on a library's resources
Archive	governed by specific archival management policies, the process by which an entity or the copy of one can be stored or transferred to data storage.
Association College Research Libraries (ACRL)	The Association of College and Research Libraries (ACRL), a division of the American Library Association, is a professional association of academic librarians and other interested individuals. It is dedicated to enhancing the ability of academic library and information professionals to serve the information needs of the higher education community and to improve learning, teaching, and research.
Authenticate	process by which a system verifies the identity of a user. The user may be a person using a computer, a computer itself, or a computer program.
Authority	Authority records provide the authoritative display, listing, and indexing for Subject, Name, Title, Name/Title, so that all works by an author, for example, can be found with one unified Author Authority. Authority values can be selected and imported or manually copied from an external source in multiple standard formats. The actual "input" in the Author or Subject Heading field of the Bibliographic record, for example, could either hold the actual textual value (copied) or a hyperlink or UUID to the appropriate Authority record.
Authorize	process by which a system validates that a known individual or entity has the authority to perform specific actions within the system.
Automated Storage Retrieval (ASR)	A computer-controlled mechanical system designed to move items efficiently into compact storage and out again automatically, without human intervention. In libraries with large collections, ASRSs are used to maximize storage density and reduce labor costs by storing books and other materials in bins mechanically stacked in rows. Definition retrieved 6/6/2014 from http://www.abc-clio.com/ODLIS/odlis_a.aspx#asrs

B

Barcode (number)	In libraries, barcode number labels are physically attached to items as unique identifiers and are indexed to permit retrieval of an item's record(s) when the barcode number is scanned or typed in as a search term. Barcode numbers are also assigned to patrons and may be printed or encoded on magnetic stripes on an ID card. Patron barcodes are unique identifiers, indexed to permit retrieval of a patron's record when the barcode number is scanned or typed in as a search term. Barcodes are most frequently used to identify and link patrons to items when items are borrowed; library staff use barcode searches for record retrieval, typically for items in hand when record edits are required.

Barcode validation	A system feature that permits identification of a barcode as pertaining to an item or to a borrower (either through an initial digit or number of characters, set as a system configuration value); and/or calculation of a checksum using the barcode number's check digit in order to determine the validity of the barcode format.
Batch Job	Batch jobs, or batch processing, are what update General Ledger balances, other KFS/OLE tables, and files/jobs for exports. Batch jobs need to be run on some schedule to keep OLE in sync with external systems, such as University Financial.
BiblioCommons	Vendor database. See http://www.bibliocommons.com/
Bibliographic description	An OLE document that describes a bibliographic entity as published. Often referred to by library staff as a "bibliographic record." OLE will initially support two kinds of bibliographic records: (1) Those in the USMARC bibliographic formats, and (2) Dublin Core records.
Bibliography, bibliographic data	Metadata describing a title such as title, author(s), publisher, date of publication, standard number(s), subject headings, format, physical characteristics, etc. See Also Holdings, Item, MARC, Dublin Core.
Blanket Approve	Authority that is given to designated Reviewers who can approve a document to a chosen route point. A Blanket Approval bypasses approvals that would otherwise be required in the Routing. For an authorized Reviewer, the E-document will displays the Blanket Approval button along with the other options. When a Blanket Approval is used, the Reviewers who are skipped are sent Acknowledge requests to notify them that they were bypassed.
Blanket Order	Generally refers to a situation where a library automatically receives any and all publications from a publisher or other entity. See Also Standing order.
Book Number	A decimal number consisting of a letter of the alphabet followed by one or more digits that is appended to a class number in order to arrange material on the same subject in a specified order, usually alphabetically by author.
Borrower	See Patron.
Borrower Session	A single visit to the circulation desk by a borrower. Multiple items may be loaned during a single borrower session.
Borrower Type	A group of library users (e.g., "undergraduate", "graduate", "faculty, "alumni", "affiliate", etc.) who share a primary characteristic(s) and have the same service privileges (e.g., loan period, fine rate, access (or not) to interlibrary loan, etc.). Borrower type is one component in determining whether or not a user can borrow a library item and if so, under what policies.
"Bound with"	A physical object where two or more titles are joined together under one cover. The object is represented in a system as a single item which links to more than one bibliographic record.
Branding	Typically uploading an image of, or linking a library's logo to the main page of a platform.
Browse	To enter a sorted index at a particular point, and then to be able to page up or down through the index (possibly all the way up to the beginning or all the way down to the end). Distinguished from "search," which means to attempt to retrieve a finite set of records based on a search term or terms. A search ordinarily produces a

	finite subset of records (which might then be sorted); a browse positions the user at a particular place within an i
Business Analyst	a liaison among stakeholders in order to understand the structure, policies, and operations of an organization, and to recommend solutions that enable the organization to achieve its goals.
Business Process Engine	an OLE infrastructural middleware tool, the business process engine manages and executes library business processes defined by OLE
Business Process Modeling	a design approach used by OLE to document core library processes. The start and end points, step by step descriptions of how functions are performed, and contingencies are written down, and duplicate processes identified.
Business Rules	1. Describes the operations, definitions and constraints that apply to an organization in achieving its goals. 2. A restriction to a function for a business reason (such as making a specific object code unavailable for a particular type of disbursement). Customizable business rules are controlled by Parameters.

C

Call number	An identifier assigned to an object, usually printed on a label attached to the object, and used to determine its physical position in a shelving sequence in a library. Call numbers are derived from classification schemes; Dewey, Library of Congress (LC) and Superintendent of Documents (SuDoc) are the three major classification schemes used in North American libraries. See Also [Element] classification.
Cancel	A workflow action available to document initiators on documents that have not yet been routed for approval. Denotes that the document is void and should be disregarded. Canceled documents cannot be modified in any way and do not route for approval.
Cancellation	The process by which a library ends its subscription to a resource.
Cancelled Request Notice	Notice sent to a patron when a hold has been manually cancelled by the library staff. See Also Notices.
Caption	In serials, a caption is a character(s) used for to label a level of enumeration or chronology, e.g., "v." (volume), "no." (issue number), "pt." (issue part), etc. See Also Enumeration, Chronology.
Capture	process by which exposed data/metadata from an agency/source is harvested or deposited into the collection
CAS	Authentication: Central Authentication Service (CAS)
Casalini libri	Vendor--based in Italy--for the academic and research library community, specializing in the distribution of scholarly materials from countries outside the U.S.
Cataloging	Used to label Describe-Manage library activities, and can be performed by acquisitions, cataloging, or even licensing and circulation staff.

Charge/Charge Out	See Loan.
Chart	The Chart document is used to define the valid charts that make up the high-level structure of the KFS Chart of Accounts. It also indicates who has management responsibilities for each chart and which object codes are used for system-generated accounting lines for the chart.
Check digit	A check digit is a form of redundancy check used for error detection, the decimal equivalent of a binary checksum. It consists of a single digit computed from the other digits in the message.With a check digit, one can detect simple errors in the input of a series of digits, such as a single mistyped digit or some permutations of two successive digits. In libraries, e.g., check digit routines can be used to validate ISBNs, ISSN, and item and borrower barcode numbers.
Checkin (circulation)	See Return. See Also Return.
Checkin (serials)	The process by which a library records receipt of individual serial issues
Checkin action	A check-in action is a single identifiable block of behavior that may take place during check-in. A check-in action will do something, then return check-in conditions back to the check-in session where it originates.
Checkin condition	A check-in condition indicates what the operator should do with a checked-in item. A single check-in can generate multiple check-in conditions. Each check-in condition can generate several interactive notifications to the user.
Checkin message	A Check-in message tells the user what to do with a checked-in item. A single check-in can generate multiple Check-in messages.
Checkin session	A single check-in session is one sequence of item check-ins. The check-in session is a coherent block of work in the UI. Note that the materials in a given check-in session do not necessarily have anything to do with each other--often they are a mixture of materials from different places in the same bin. For things like batched receipt printing, it does make sense to treat the check-in session as a unit of work, though.
Checklist Template	A specific file (or files) that represents a university, library, or other institution's contractual requirements; licenses negotiated by the institution usually must meet (or attempt to meet) these specific requirements. Form of Agreement Document.
Checkout	See Loan.
Chronology	Descriptive information for the dating scheme of a serial, usually identified by level, e.g., level 0 = year level 1 = month would mean that each issue of the serial has a month and a year on each issue. Coupled with other information such as enumeration, frequency, etc., a system can predict the dating that appears on each issue. Chronology levels may also be assigned a descriptive caption. See Also Caption, Enumeration, Serial.
Circulation	The functions, policies and processes by which a library loans materials to its users, tracks such transactions and charges fines and fees for policy violations, e.g., overdue fines for late returns, lost item replacement fees, etc. Departments in charge of circulation may also issue borrower ID cards, rent lockers, collect copying fees, manage the interlibrary loan function, etc.

Circulation Location	The place that is considered an item's "home" when it is presented for circulation transactions, i.e., it can be checked out without override AND, when checked-in, does not need to be routed as it is already "home". See Also Location.
Citation Parser	application that parses document citations into fielded data. You can use it as a web application or a service (see also Code4Lib presentation 2009- https://docs.google.com/present/view?skipauth=true&ncl=true&id=dc5dd3br_0df622z6t
Claim	The action (or a record thereof) of notifying a vendor that an ordered item has not been received for whatever reason. A claim can be made for a PO line item OR for a single issue of a serial title. Claims can be prompted by: non-receipt, receipt of the wrong version of an item, receipt of a damaged copy, etc.
Class-together Series	A monographic series which the library has chosen to give a single call number, instead of giving different call numbers to the individual volumes. A series to which the library has chosen to give different call numbers to the individual volumes is said to be "classed separately" or "scattered."
[Element] classification	The set of data elements within the OLE Instance Schema that, taken together, make up the "call number" and state what classification/call number system (e.g., Library of Congress, Superintendent of Documents, Dewey Decimal) the call number conforms to.
Classification (classification scheme, classification schedule)	A system of coding and grouping library materials (books, serials, audiovisual materials, computer files, maps, manuscripts, realia) according to their subject and assigning a call number to each item. See Also Call number, LC (Library of Congress), Dewey Decimal Classification/Call Number, SuDoc (Superintendent of Documents) Classification/Call Number.
Clone	Ability to use an existing record (bibliographic, OLE Instance, Item, Holdings, Authority, etc.) to create a new record with some the same data values as contained in the original record.
Close	A workflow action available on documents in most statuses. Signifies that the user wishes to exit the document. No changes to Action Requests, Route Logs or document status occur as a result of a Close action. If you initiate a document and close it without saving, it is the same as canceling that document.
Cloud computing	Delivery of software as a service via a network, typically the Internet. "Cloud computing provides computation, software, data access, and storage resources without requiring cloud users to know the location and other details of the computing infrastructure. End users access cloud based applications through a web browser or a light weight desktop or mobile app while the business software and data are stored on servers at a remote location. Cloud application providers strive to give the same or better service and performance as if the software programs were installed locally on end-user computers."
Code	An individual Code within a Code List. A Code within a table of Codes will have the attribute, Display Value. See Also Display Value.
Code List	A list of valid values for a particular data element within OLE. For example, there will be a Code List for Locations; a user cannot assign a Location value within an Item unless it is part of the library's Location Code List (which might be shown in

	an OLE editor in the form of a pull-down menu). Ideally, the user could not assign the Code for a Location unless the user were authorized to assign that particular Code (in which case the OLE editor should show the user a pull-down menu of Locations that included only those Locations that the user is allowed to use). Within OLE, a Code List is made up of code values from similar maintenance documents. See Also Location, Location code.
Collection (general)	All materials owned by a library are often referred to as its "collection(s)". Can also mean the materials kept together in one area of a library, e.g., General Reference Collection, Music Recordings Collection, etc. usually in one sequence (e.g., by call number). See Also Location (shelving), Collection (shelving).
Collection (shelving)	An area of a library where a set of similar materials is physically kept, e.g., "General Reference Collection", "Circulating Collection", etc. where items are typically organized in a single sequence (most often by call number), A collection in this sense is often identified as a "shelving location". See Also Location (shelving).
Collection	An OLE entity, a collection is a group of managed relationships. Collections are not necessarily formal library collections, and may be virtual collections, hierarchical relationships, relationships across formats, or a collection of people and services.
Collection Space	(http://wiki.collectionspace.org) Academic and research libraries share similarities with museums and cultural heritage organizations in how they operate and manage their collections. Both types of organizations acquire, describe, manage, and preserve physical, and increasingly virtual, objects. During the OLE Design Project, CollectionSpace was identified as a community-source project that had some confluence of approach of service orientation, modular design, and functionality with the Kuali OLE project. Through conversations with CollectionSpace, the Kuali OLE Partners have established a basis for sharing appropriate programming code and software design parameters. These efforts could save Kuali OLE efforts while designing acquisition and description services, and could result in greater integration between these two projects. In discussions with CollectionSpace, the Kuali OLE Partners have agreed to formal interactions of these projects by a reciprocal advising between the boards of the two projects.
Commit Funds (Acquire)	process allows purchase price for entity to be encumbered from the appropriate fund; incorporates selector guidelines for assigning funds to order.
Commitments	This is a running total of costs expected in the future, from purchase orders that have been placed, but not yet paid for. Commitments are an inexact science, and their importance varies according to the types of purchases the library makes. Many libraries only use them for some types of orders (like firm orders, or print monographs), but do not use them at all for other types (like serial standing orders).
Completed	The action taken by a user or group in response to a request in order to finish populating a document with information, as evidenced in the Document Route Log.
Component	A set of functional library business processes defined by OLE
Configure Metadata (Manage)	process where metadata is normalized and processed according to established rules.

Context	In KRMS, a context is a container for related agendas. Contexts are also used to control what types of actions, terms, etc. are available. See Also Agenda.
Continuation order	Continuation orders are commitments from a library to purchase titles published over time, e.g., a series. A continution order is an order where it is not known what all the titles in the series are going to be, making it a type of standing order. In fact the only real difference between a continuation order and a standing order is that there may be multiple series ordered on a PO and that the distribution information is considered more than just a default. But just like standing orders, the order does not control what title is actually received. Instead, each title comes as it is published and it is then that the library describes it, receives it, and pays for it. Unless discontinued, a continuation order will be modified by year-end so that it continues against a new fiscal year. Unlike subscriptions, continuation orders are continued as opposed to being renewed. It is also possible that a multi-volume set, published over time, would be ordered as a continuation; this would probably be dictated by how payment was made--if the entire amount was paid in advance, it would likely be created as a firm order; if paid as each volume arrived, it might be created as a continuation order. See Also Standing order, Firm Order.
Copy	A single specimen of an intellectual entity, e.g., a library can have one (or more) copies of a single-volume monograph; one (or more) copies of a multi-volume set; etc. A single subscription to a journal may also be known as a "copy". A multipart book (or a serial subscription) is a copy with as many items as there are volumes. See Also Holdings, Item, Title.
Copy Request	Request for an item to be retrieved from its shelving location and designated pages from that item to be reproduced (scanned or photocopied) for the requesting patron. See Also Request.
Coutts	Coutts Information Services for book supply, collection management and shelf-ready services
Create Entity Relationships	process that creates a link between two or more entities. Entities can include resources, people, courses, facilities, organizations, finances, etc.
Create Metadata (Select, Describe)	Process where descriptive, structural, and/or administrative information about an entity is generated.
Customer	See Patron.
Cutter Number	A method of representing words or names by using a decimal point followed first by a letter of the alphabet, then by one or more Arabic numerals. A Cutter number is read and sorted as a decimal number. The cutter number is a coded representation of the author or organization's name or the title of the work (Charles Ammi Cutter first developed cutter numbers using a two-number table. A three-number table was developed in 1969.)

D

Data Architect	A data architect is a person responsible for ensuring that the data assets of an organization are supported by an architecture supporting the organization in achieving its strategic goals. The architecture should cover databases, data

	integration and the means to get to the data. Usually the data architect achieves his/her goals via setting enterprise data standards. A Data Architect can also be referred to as a Data Modeler, although the role involves much more than just creating data models.
Data / Dataflow diagrams	A data flow diagram (DFD) is a graphical representation of the "flow" of data through an information system, modeling its process aspects. Often they are a preliminary step used to create an overview of the system which can later be elaborated
Data Models	OLE infrastructural middleware tools, data models define how data is represented, accessed, and exchanged. Data models are independent of OLE components and databases.
Date Approved	The date on which a document was most recently approved.
Date Finalized	The date on which a document enters the FINAL state. At this point, all approvals and acknowledgments are complete for the document.
DCMI (Dublin Core Metadata Initiative)	The Dublin Core Metadata Initiative (DCMI) is an open organization, incorporated in Singapore as a public, not-for-profit Company, engaged in the development of interoperable metadata standards that support a broad range of purposes and business models.
DDC	See Dewey Decimal Classification (DDC).
Defaults	new functionality via OLE for system, org, role, or user level defaults. For example, S Miller may have default fields or selection lists pre-defined on certain documents based on his permissions or memberships. A future enhancement may be added for "My OLE" to support user-configured preferences.
Deleted TIPP	A TIPP is deleted when it is recognized as an error that should not have existed in the first place. See Also TIPP.
Deletgate	A user who has been registered to act on behalf of another user. The Delegate acts with the full authority of the Delegator. Delegation may be either Primary Delegation or Secondary Delegation. See Also Primary Delegation, Secondary Delegation.
Delegate Action List	A separate Action List for Delegate actions. When a Delegate selects a Delegator for whom to act, an Action List of all documents sent to the Delegator is displayed. For both Primary and Secondary Delegation the Delegate may act on any of the entries with the full authority of the Delegator.
Delete Entity Relationship (MER)	process that removes a link between two or more entities. Entities can include resources, people, courses, facilities, organizations, finances, etc.
Delete Metadata (Select, Describe)	process where descriptive, structural, and/or administrative information about an entity is removed
Delimiter	This is a character or symbol that is used in front of each subfield in the MARC record. The delimiter indicates to the computer that a different piece of information is coming. In OLE, it is the | (bar).
Deliver Entity	OLE component that tracks the request and supply of a resource including the resource availability, the terms of access, the preconditions of use, and whether

	the user requesting the resource has been identified and their credentials checked and verified.
Delivery	Library will deliver item to patron's designated location, rather than asking the patron to come to the libary for it. See Also Request.
Describe Entity	OLE component where metadata for an entity is obtained, created, modified and deleted
Describe- Create	See Create Metadata.
Describe- Expose	See Expose Data.
Describe- Obtain	See Obtain Metadata.
Describe-Delete	See Delete Metadata.
Describe-Modify	See Modify Metadata.
Development Infrastructure, OLE	This is the development infrastructure being used by OLE- see wiki page to understand development environment: Application Servers, Database Servers/ Schemas, Instances, Schemas, Continuous Integration, Amazon Web Console
Dewey Decimal Classification/ Call Number	A scheme that organizes knowledge into 10 classes, 100 divisions and 1000 sections, using decimals for these categories to create call numbers. Works are classified principally by subject, with extensions for subject relationships, place, time or type of material, producing classification numbers of at least three digits but otherwise of indeterminate length with a decimal point before the fourth digit, where present (for example, 330 for economics + .9 for geographic treatment + .04 for Europe = 330.94 European economy; 973 for United States + .05 form division for periodicals = 973.05 periodicals concerning the United States generally). See Also Call number.
Disapprove	A workflow action that allows a user to indicate that a document does not represent a valid business transaction in that user's judgment. The initiator and previous approvers will receive Acknowledgment requests indicating the document was disapproved.
Discharge	See Return.
Discovery Tool(s)	Applications (both proprietary and open source) providing search and discovery functionality for library end-users; may include features such as cross-database searching, relevance ranking, spell checking, tagging, enhanced content, search facets. Examples include AquaBrowser, Primo, eXtensible Catalog, Blacklight, etc.
Display Value	An attribute of a Code that specifies an alternate display value for the Code within a particular interface. For example, the code "REGENSTEIN" might have Display Value "Regenstein Library." The display value could appear in places within the OLE user interface, but could also be used by an external Discovery Tool. See Also Code, Discovery Tool(s).
Doc Nbr	See Document Number
Docstore	OLE architecture for structured and unstructured metadata (e.g., bib, item, holding, authority, licenses) that works in conjunction with linked transactional

	data in an OLE RDBMS/relational tables (e.g., purchasing, circulation, users, financial, borrowers).
Document Description	The description given to the document when it was created. Depending on the Document Type, this description may have been assigned by the Initiator or built automatically based on the contents of the document. The Document Description is displayed in both the Action List and Document Search.
Document ID	See Document Number
Document Number	A unique, sequential, system-assigned number for a document
Document Search	A web interface in which users can search for documents. Users may search by a combination of document properties such as Document Type or Document ID, or by more specialized properties using the Detailed Search. Search results are displayed in a list similar to an Action List.
Document Store	See DocStore.
DOI	Discovery: The Digital Object Identifier (DOI®) System is for identifying content objects in the digital environment. DOI® names are assigned to any entity for use on digital networks. They are used to provide current information, including where they (or information about them) can be found on the Internet
Donor Note	Donor information in an item if not purchased from specific donor funds; may be a code
Donor Public Display	Text of a Donor Note to acknowledge a specific donor
Drupal	Drupal is a free software package that allows anyone to easily publish, manage and organize a wide variety of content on a website.
Dublin Core	The Dublin Core set of metadata elements provides a small and fundamental group of text elements through which most resources can be described and cataloged. Using only 15 base text fields, a Dublin Core metadata record can describe physical resources such as books, digital materials such as video, sound, image, or text files, and composite media like web pages. Metadata records based on Dublin Core are intended to be used for cross-domain information resource description and have become standard in the fields of library science and computer science. Implementations of Dublin Core typically make use of XML and are Resource Description Framework (RDF) based. Dublin Core is defined by ISO through ISO Standard 15836, and NISO Standard Z39.85-2007.
Due Date/Time	The date and/or time by which a loaned library must be returned in order to avoid a penalty.

E

EAD (Encoded Archival Description)	The EAD Document Type Definition (DTD) is a standard for encoding archival finding aids using XML and is maintained in the Network Development and MARC Standards Office of the Library of Congress (LC) in partnership with the Society of American Archivists.
EBSCO	"EBSCO provides libraries with traditional print subscription services and electronic information discovery and management solutions." http://www.ebscoind.com/EBSCOInformationServices.asp

EDI	Electronic Data Interchange; structured transmission of data between organizations by electronic means. Usually a sequence of formatted messages between two parties. EDI formatted data can be transmitted using any methodology agreed to by the sender and recipient: FTP, HTTP, VAN, etc.
EDIFACT	Electronic Data Interchange for Administration, Commerce and Transport, an EDI standard adopted by the United Nations.
EDIFACT Invoice Message	A file containing EDIFACT data for one or more vendor invoices.
EDIFACT Message Segment	A specific portion of the EDIFACT message, identified by a 3-letter code and a segment number
EDItEUR	Trade standards body for the global book and serials supply chains, with over 80 members in 18 countries. Works with EDIFACT, ONIX and other standards.
eDoc	"electronic document", an online business transaction initiated in a Web-based form and routed electronically through a prescribed sequence of approvers. When the eDoc has been through its entire approval process, it is maintained in a database for future reference. The OLE adaption of Kuali Financial System (KFS) for Select and Acquire uses eDocs.
eDoc Search	The online application that lists eDocs by search conditions that you choose. You may select an eDoc in the search results and view its contents or its routing sequence.
E-Instance	E-Instance documents identify and describe electronic titles locally owned or licensed by libraries and as such contain unique information that cannot be captured by the global data provided by GOKb. They are the electronic counterpart to the OLE Instance record. Each e-instance belongs to a bib record.
Electronic Data Interchange	See EDI
Encumbrances	This is a running total of costs expected in the future, from purchase orders that have been placed, but not yet paid for. Commitments are an inexact science, and their importance varies according to the types of purchases the library makes. Many libraries only use them for some types of orders (like firm orders, or print monographs), but do not use them at all for other types (like serial standing orders).
Endowments	Endowments are restricted funds, segregated by the parent institution from other funds. Institutions normally do not spend the capital in an endowment, only some or all of the interest the fund earns each year. Unspent interest may be re-capitalized, increasing the size of the endowment over time. Endowments may have restrictions imposed by the donor in terms of subject matter or material type. Endowments often carry requirements for reporting to the donor, or for plating (placing a physical bookplate in a book, or attaching a virtual bookplate to an online resource).
Enhanced content	In discovery tools, a feature that refers to augmentation of standard bibliographic metadata with additional information such as cover images, tables of contents, book reviews, author biographies, content summaries, etc. Typically supplied by a vendor, e.g., Syndetic Solutions (owned by R.R. Bowker).
Enterprise Level Integration	using a defined relationship, process by which a system allows linking of services and business entities across applications to promote unrestricted data sharing
Entity	An Entity record houses identity information for a given Person, Process, System, etc. Each Entity is categorized by its association with an Entity Type.

Enumeration	Descriptive information for the numbering scheme of a serial, usually identified by level and a descriptive caption, e.g., level 0 = v. and level 1 = no. would mean that each issue of the serial has a volume and an issue number that would appear, e.g., as "v. 1 no. 3". See Also Caption, Chronology, Serial.
EOCR	Electronic Order Confirmation Record. A typical case would be: a library places orders with a vendor, and the vendor returns a file of order confirmations. The file could contain bibliographic records, data to populate holdings and item records, and data to populate order records.
E-resource record	The E-Resource record provides a central place to store information about an e-resource acquisition throughout its lifecycle. The E-resource may be linked to one or many OLE E-Instances or print Instances.
Event Manager	OLE middleware that analyzes and reports system event data, for example actions performed by users, changes in status. (Rice)
Ex Libris	Commercial vendor of ILS systems ALEPH and Voyager; link resolver SFX; consolidated searching tool MetaLib; ERM application Verde; digital resource management application DigiTool; discovery tool Primo; and Alma, next-generation ILS in the cloud.
Exception	A workflow routing status indicating that the document routed to an exception queue because workflow has encountered a system error when trying to process the document.
Exception Routing	A type of routing used to handle error conditions that occur during the routing of a document. A document goes into Exception Routing when the workflow engine encounters an error or a situation where it cannot proceed, such as a violation of a Document Type Policy or an error contacting external services. When this occurs, the document is routed to the parties responsible for handling these exception cases. This can be a group configured on the document or a responsibility configured in KIM. Once one of these responsible parties has reviewed the situation and approved the document, it will be resubmitted to the workflow engine to attempt the processing again.
Expenditure	The actual expenditure of money is done by other parts of the system (payment request, disbursement vouchers). The fund accounting system's role is to track the money involved, and to update the fund balances. Paying an expenditure usually involves removing any commitment from the purchase order involved. (Note: to be added to Payment requirements- There can be partial expenditures with partial commitments needing to be held until final receipt and payments made against to be shipped materials. I think we want the system to have this capability.)
Expired Hold	See On Hold Courtesy Notice.
Expired Request Notice	Notice sent to a patron when the request has expired unfilled. See Also Notices.
Expose Metadata (Describe)	process where metadata has been made available for capture
eXtensible Catalog	See XC.
External funding sources	(still has university accounts, money still tracked and reported to university account- just different funding sources, ie not general fund). Libraries frequently

receive special funding from outside sources. These may include: grants from foundations, government agencies, other charities, etc. to the library (title 6- depts get grants, but $ reported to library and portion that is library's is tracked in LMS); grant money given to other parts of the organization, but subvented to the library for purchases supporting the project receiving the grant; internal grants, from other divisions of the library's parent organization. For instance, it is not uncommon to share the cost of a particular purchase with a specific school at a university, separate from whatever other money the school may be contributing to the library budget; income from endowments or trusts held outside the university

EZProxy
: EZproxy is a web proxy server program extensively used by libraries to give access from outside the library's computer network to restricted-access websites that authenticate users by IP address. This allows library patrons at home or elsewhere to log in through their library's EZproxy server and gain access to bibliographic databases. OCLC Is the owner of EZProxy.

F

Fact
: In KRMS, actual data points within a proposition used when executing a rule. See Also Proposition, Rule.

Fast Add
: A means of circulation staff quickly assembling a cataloging record for the purpose of circulating a title to a Patron. Also brief bib or brief record

Fee
: A monetary charge levied by a library as a penalty (e.g., overdue fine, replacement cost for a lost item) or for a service (e.g., copying, locker rental). See Also Overdue Fine, Replacement fee.

Field Lookup
: The round magnifying glass icon found next to fields throughout the GUI that allow the user to look up reference table information and display (and select from) a list of valid values for that field.

Final
: A workflow routing status indicating that the document has been routed and has no pending approval or acknowledgement requests.

Fine
: See Overdue Fine.

Firm Order
: Firm orders are commitments from a library to purchase a quantity of a title from a provider. Once all quantities are resolved on a firm order (received & paid for, or cancelled) the order is considered complete and that no further relationship continues with a provider with regards to that firm order.

Fluid Foundation Project
: A critical aspect of any software system is the user interface. While Kuali OLE will not provide a public interface, it will need to provide interfaces for staff interactions. Efficiencies and ergonomics of the staff interface will help determine the overall utility and efficacy of Kuali OLE. The Fluid Project, an international group of designers, developers, advisors and volunteers that focus on improving the user experience of community and open source web applications, has agreed to provide consultation and development of the Kuali OLE user experience framework. This work will provide an ergonomic framework for constructing and extending user interfaces for staff interaction with Kuali OLE functions. The commitment of the Fluid Project extends to consultation and support, mentoring and design participation, and contracting for services. We anticipate a successful collaboration with the Fluid Project that will enrich both the Kuali OLE and the Fluid communities. (http://wiki.fluidproject.org)

Format	The physical form of a title, e.g., a printed book, e-book, DVD, map, serial, CD, kit, etc. See Also Title.
FRBR	Content and Metadata; Functional Requirements for Bibliographic Records, a conceptual entity relationship model developed by IFLA for retrieval and access (Work, Expression, Manifestation, Item) http://www.ifla.org/publications/functional-requirements-for-bibliographic-records
Frequency	The interval at which a serial appears, e.g., daily, weekly, monthly, quarterly, etc. See Also Serial.
Functional specification (fspec)	a set of functional library requirements for a specific library process or set of related activities. In OLE, we are isolating our Fspecs per User Story in order to define a small, easily specified set of requirements.
Fund	a portion of available money in any FY budget used to purchase materials. A fund can be used to purchase any kind or type of material or be dedicated to purchasing materials of a particular kind. Traditional Fund Codes could be long strings, that may include accounting information, fiscal year, and object codes (depicting departments, subjects, collections, donors etc). When libraries or specifications say "library fund", "fund" or "fund-code", it is meant as the financial structure to which a budget is attributed. This term is commonly used to refer to the OLE accounting string (chart, account, object code, plus optional elements if desired)

G

Gift exchange	A voluntary agreement between a library and another organization whereby the parties agree to trade specified types of materials without charge.
Gift fund	Gift funds are similar to endowments in their segregation and potential restrictions. The difference is that the money in a gift fund is not capitalized, so its full balance is available to be spent when the institution desires. Some gift funds are one-time gifts, and are gone once they are fully spent. Others exist for many years, if the donor continues donating more money to them.
GILS ISO	Discovery: Global Information Locator Service. http://www.gils.net/about.html
GLCP	General Ledger Correction Document. A document type OLE inherited from KFS. Used to load files of ledger entries, usually generated by batch jobs. Used by several steps in the fiscal-year-rollover process.
Global edit	The ability to make identical changes to multiple records (OLE Instance, Bibliographic Description, or Authority)
GOBI	An online selection and ordering tool provided by Yankee Book Peddler that allows library selectors to place orders using library-profiled data such as funds, etc. and define approval plans for automatic shipment of materials. GOBI provides bib, item, order and invoice metadata to a library for batch import.
Grace Period	The number of days/hours by which the system automatically extends a loan period (often unbeknownst to a borrower) so that items checked in before the end of the grace period are treated as being returned on time, i.e., no fines or penalties are assessed.

Group — A Group has members that can be either Principals or other Groups (nested). Groups essentially become a way to organize Entities (via Principal relationships) and other Groups within logical categories.

Groups can be given authorization to perform actions within applications by assigning them as members of Roles.

Groups can also have arbitrary identity information (i.e., Group Attributes hanging from them. Group Attributes might be values for "Office Address," "Group Leader," etc.

Groups can be maintained at runtime through a user interface that is capable of workflow.

GUI — Graphical User Interface (also UI).

H

"Happening" Location — A work unit in a library where certain functions are performed for items housed (or to be housed) at all or some of a library's shelving locations. An essential component of staff operator login and setting up permissions.
See Also Location.

Harrassowitz — Vendor--based in Germany--for the academic and research library community, specializing in the distribution of scholarly materials from countries outside the U.S.

Hathi Trust — HathiTrust is a partnership of major research institutions and libraries working to ensure that the cultural record is preserved and accessible long into the future.

Heading — The descriptive metadata for a name (personal or corporate), topic/subject, series title or uniform title. When placed in an authority record, a heading can be coded as "established" (suitable for use when creating bibliographic metadata) or as a "see" cross-reference (used to guide users to the "established" form).

Hide Record — To mark a record (bibliographic, holdings, item) so that is does not display in a public-facing service.
See Also Staff Only.

Hold Courtesy / Expired Hold Notice — Notice sent to a patron when the length of time an item is on the hold shelf has passed.
See Also Notices.

Hold Expiration Date — See Request Expiration Date

Hold Request — The ability for a patron/borrower to ask that an item currently on loan to another patron/borrower be made available when it is returned. Hold requests do not alter the existing loan period for the current borrower. If an item with a hold request also has a recall request, the latter will always be filled first.
See Also Request, Recall Request.

Hold Slip — PDF printed at a circulation desk to place in a book to identify the patron for which the book is being held.

Holding Description — The part of an individual OLE Instance containing the Holdings data. An OLE Instance must have one and only one Holdings Description.

	See Also OLE Instance.
Holdings	OLE Definition: Describes the extent of a resource available to the user. In the case of continuing resources holdings data may record the pattern of issuance of a resource and/or a summary statement of volumes held. 12/16/2011. See also Item. Traditional Library Definition: Metadata describing a library resource in terms of its physical or virtual location and a statement of the quantity/sequence available (e.g., 3 copies; volumes 1-12, etc.). In the case of a multipart resource, holdings data may record the pattern of issuance (i.e., enumeration and frequency patterns of a journal) as well as a summary statement of the parts available to users. A separate MARC holdings record may be linked to the related MARC bibliographic record by field 004 (Control Number for Related Bibliographic Record). Holdings of serial titles may be recorded in two ways: (1) through serials check-in features as issues arrive; these may or may not have item records; (2) through item records for individual bound volumes of back issues. See Also Item, OLE Instance, OLE Holding, sourceHolding.

I

Identifier	An identifier is an alternate identifier for the patron, for instance their student number. Generally identifiers are unique to a patron although duplicates are permitted. This is in contrast to affiliations, where many patrons share the same affiliation. Identifiers also can be used for authentication - it is possible to store a username and password as an identifier. Identifiers are repeatable.
Identify Supplier (Acquire)	process that retrieves policy for contact with supplier and allows query of potential supplier list
Identify Terms of Use (Deliver)	process where a resource that has been requested has been checked for terms of access and preconditions of use. (ie, licensing)
Identify User (Deliver, KIM)	process where user requesting resource has been identified and their credentials checked and verified
Identity Management	process where user is identified and their credentials checked and verified. The users could be a person using a computer, the computer itself, or a computer program and could use protocols such as LDAP, Shibboleth, Secure Shell Keys, and Certificates. Identity management may be performed by an OLE or 3rd party component. (KIM, KEM)
ILL, Interlibrary Loan	service whereby a user of one library can borrow books or access other resources that are owned by another library
ILS-DI API	Discovery: "From the standpoint of libraries it would be ideal to be able to mix_and_match ILS and discovery plaJorms to suit local needs. To create such a rich environment the library and vendor community will need agreement on the specific technical details of how discovery and ILS systems are to integrate"
Import	The act of importing, or ingesting, and processing information from an external vendor; performing match-n-merge overlay; and creating appropriate documents inside OLE.
Import Process	Manual process for a staff user to transfer a Bibliographic Description or an authority record from a utility or a file of Bibliographic Descriptions or authority

	records into the local database. The import process can be used to create a new Bibliographic Description/authority record or to replace an existing Bibliographic Description/authority record.
Ingest	See Import.
Initial subscription start date	The first day of the initial subscription term for which an order was placed.
Initiated	A workflow routing status indicating a document has been created but has not yet been saved or routed. A Document Number is automatically assigned by the system.
Initiator	A user role for a person who creates (initiates or authors) a new document for routing. Depending on the permissions associated with the Document Type, only certain users may be able to initiate documents of that type.
Innovative Interfaces, Inc. (III)	Commercial vendor of ILS system Millennium and discovery tool Encore.
Inquiry	A screen that allows a user to view information about a business object.
Instance	See OLE Instance.
Intellectual entity	in a library context, any work in any format considered for purchase or licensing, e.g., a book, serial, DVD, sound recording, archive, manuscript collection, map, database, online resource, indexing service, etc.
Inventory	process by which an entity is evaluated and tracked for retention and version preference, and access and descriptive metadata updated. May be used to manage weeding, reformatting, or relocation.
Invoice	New type of document to enter invoice payment requests in order to avoid having to create individual PREQs and to distribute the cost of additional charges.
ISBN	An International Standard Book Number "identifies the title or other book-like product (such as an audiobook) to which it is assigned, but also the publisher to be contacted for ordering purposes." ISBNs are 13-digit numbers (formerly 10-digits); the various elements of the number are separated by a hyphen (-).
ISSN	The ISSN is the standardized international code which allows the identification of any serial publication, including electronic serials, independently of its country of publication, of its language or alphabet, of its frequency, medium, etc. The ISSN number,therefore, preceded by these letters, and appears as two groups of four digits, separated by a hyphen , has no signification in itself and does not contain in itself any information referring to the origin or contents of the publication.
Issue	An individual piece of a serial title. An issue often (but not always) has a unique enumeration (e.g., volume 5, number 6) and chronology (e.g., June 2010) that distinguishes it from other issues of the serial title. See Also Serial.
Item	OLE Definition: Describes the smallest unit of a resource that is managed and/or circulated individually. It provides specific information regarding the physical location when pertinent. Traditional Library Definition: An individual physical piece (e.g., a single print volume; a DVD; an archival box; a CD jewel case) to which a library typically assigns a unique barcode number and affixes the barcode number label.

	See Also Copy, Holdings, OLE Instance, OLE Holding, sourceHolding, Title, Piece.
Item availability status	The item availability status is a single field that indicates whether the library can loan an item. Items become temporarily unloanable when they are part of some process, such as being on order, being on loan to another patron, and so on.
Item description	The part of an individual OLE Instance containing the data about an individual Item. An OLE Instance must have at least one Item Description and may have many Item Descriptions.
Item-level	To request an individual, specific copy of a work, or make a request on something where only one copy exists. See Also Request.
Item status	A descriptor describing an item's state for circulation purposes, e.g., "not checked out", "on hold", "checked out", "on shelf", etc. If an item is still in the order process, item status typically is the same as the order status, e.g., "on order", "received", "in processing", etc.
Item type	An identifier assigned to each item in a library that, in circulation, is one component that can determine whether or not such an item can be borrowed and, if so, the conditions of the loan. Item types are generally defined by each library and can be either a specific format (e.g., "DVD", "CD", "Map", etc.) or an indicator of borrowing eligibility (e.g., "Circulating", "Non-Circulating"). In practice, item type itself does not determine loan conditions but is used in combination with location and borrower type.

J

JISC	licensing company. See http://www.jisc.ac.uk
Journal	See Serial.
JSON	Delivery: JavaScript Object Notation. See http://www.json.org/
JSTOR	"JSTOR is a not-for-profit service that helps scholars, researchers, and students discover, use, and build upon a wide range of content in a trusted digital archive of over one thousand academic journals and other scholarly content." http://www.jstor.org/

K

KCA	Kuali Commercial Affiliate. A designation provided to commercial affiliates who become part of the Kuali Partners Program to provide for-fee guidance, support, implementation, and integration services related to the Kuali software. Affiliates hold no ownership of Kuali intellectual property, but are full KPP participants. Affiliates may provide packaged versions of Kuali that provide value for installation or integration beyond the basic Kuali software. Affiliates may also offer other types of training, documentation, or hosting services.
KFS	See Kuali Financial System
KFS Administrative Transactions	Allows the financial representation of a business activity performed by an administrative or central office. Administrative transactions are like all

	transactions in that they are recorded in journals or e-docs that are then posted to the General Ledger and affect the financial statements of the organization. Examples of administrative transactions are effort certification recreate, cash management, and journal voucher.
KFS Custom Document Searches	Allows searches for specific types of documents based on attributes of the transactions, primary key data elements, or both. Additional fields, specific to different modules, are available on custom document searches. Examples are customer invoices and requisitions. Special access may be required to retrieve custom document searches.
KFS Transaction	Allows the financial representation of a basic business activity. Transactions are recorded in e-docs or journals that are then posted to the General Ledger and affect the financial statements of the organization. Examples of transactions are customer invoices, cash receipts and requisitions.
KIM	See Kuali Identity Management
KEW	See Kuali Enterprise Workflow
Knowledgebase	A data source for global-level descriptive data elements about e-resources
KNS	See Kuali Nervous System
KRMS	See Kuali Rules Management System
KSB	See Kuali Service Bus
Kuali Coeus	The Kuali Coeus (KC) project is building a comprehensive system to manage the complexities of research administration that fully addresses the needs from the faculty researcher through grants administration to federal funding agencies. KC is using MIT's proven COEUS system as its baseline design, filling in missing functionality from COEUS, and updating its technical architecture for vendor independence and easier integration with other administration systems
Kuali Enterprise Workflow (KEW)	workflow / Workflow Services / Kuali Enterprise Workflow (KEW) - the Kuali infrastructure service that electronically routes an eDoc to its approvers in a prescribed sequence, according to established business rules based on the eDoc content.
Kuali Entity Management (KEM)	Future enhancement to KFS and KIM as partner to KIM, but for entities- to provide another layer to differentiate customers, vendors, other groups and organizations
Kuali Financial System (KFS)	The Kuali Financial System (KFS) project is a comprehensive suite of financial software that meets the needs of all Carnegie Class institutions. Its partner institutions are colleges, universities, and interested organizations that share a common vision of open, modular, and distributed systems for their software requirements. The goal of KFS is to bring the proven functionality of legacy applications to the ease and universality of online services. Based on modular architecture. Incorporated/adapted/extended by OLE for its Select and Acquire modules.
Kuali Foundation	Kuali - (ku-wah-lee) 1) kitchen wok - humble utensil which plays an important role in a successful kitchen, 2) Kuali Financial Systems - insanely fine, collaboratively developed, modular financial information system for higher

	education, 3) Community sourced development effort for distributed services in higher-education
Kuali Identity Management (KIM)	Solutions for authentication and authorization have been provided as part of the Kuali Identity Management (KIM) module in Rice. Kuali Identity Management (KIM) provides central identity and access management services. It also provides management features for Identity, Groups, Roles, Permissions, and their relationships with each other. All integration with KIM is through a simple and consistent service API (Java or Web Services). The services are implemented as a general-purpose solution that could be leveraged by both Kuali and non-Kuali applications alike.
Kuali Materials Management (KMM)	incubator project within Kuali: Kuali Materials Management
Kuali Nervous System (KNS)	underlying infrastructure code that any Kuali module may employ to perform its functions. The KNS is a set of functionality common to many modules. Examples include creating custom attributes, attaching electronic images, uploading data from desktop applications, lookup/search routines, and database interaction. the the Kuali Nervous System (KNS) provides services for encryption and decryption of data. KNS will eventually be replaced by KRAD beginning with Kuali Rice 2.0.
Kuali OLE	The goal of the Kuali Open Library Environment Project is to define a next-generation technology environment based on a thoroughly re-examined model of library business operations. The model will then be used to develop specifications for a next generation community-sourced library management system, Kuali OLE (pronounced oh-LAY). This software system will be a part of the academic enterprise technology framework and will scale up to connect with other enterprise technology systems within the academic and administrative computing environment. The software system will also be capable of scaling down for stand-alone library use
Kuali People Management for the Enterprise (KPME)	Over the past year, many schools have expressed interest in the idea of forming a Kuali HR/Payroll project. Many of us have aging HR/Payroll systems and are looking for a comprehensive, fully functional system, that is built BY higher education FOR higher education. The interested schools have prepared a white paper to describe the objectives of the project, and an initial phase for delivery
Kuali Rapid Application Development (KRAD)	"Kuali Rapid Application Development (KRAD) is a framework that eases the development of enterprise web applications by providing reusable solutions and tooling that enables developers to build in a rapid and agile fashion. KRAD is a complete framework for web developers that provides infrastructure in all the major areas of an application (client, business, and data), and integrates with other modules of the Rice middleware project. In future releases, KNS will be absorbed into and replaced by KRAD."
Kuali Ready	Kuali Ready is a business continuity planning tool that is specific to institutions of higher education. Its aim is to increase the institution's ability to keep operating in the face of disruptive events. Kuali Ready produces departmental continuity plans, and can be used by any type of department: instructional, research, support, administrative, collections, and clinical
Kuali Rice	The Kuali Rice software provides an enterprise class middleware suite of integrated products that allows for applications to be built in an agile fashion. This enables developers to react to end-user business requirements in an efficient and productive manner, so that they can produce high quality business applications.

Kuali Rules Management System	"Kuali Rule Management System (KRMS) is a common rules engine for defining decision logic, commonly referred to as business rules. KRMS facilitates the creation and maintenance of rules outside of an application for rapid update and flexible implementation that can be shared across applications."
Kuali Service Bus	Kuali Service Bus (KSB) is a simple service bus geared towards easy service integration in an SOA architecture. In a world of difficult to use service bus products KSB focuses on ease of use and integration. Message Driven Service Execution; Transactional Asynchronous Messaging; Synchronous Messaging; Queue Style Messaging.; Topic Style Messaging; Quality of Service; Service Discovery; Reliability; Persisted Callback; Primitive Business Activity Monitoring; Spring Based Integration; Programmatic Based Integration
Kuali Student	Kuali Student will be a modular, open source, standards-based next generation student system that will offer a flexible, scalable, cost-effective system that can be configured to meet the business requirements of any higher education institution

L

Last Modified Date	The date on which the document was last modified (e.g., the date of the last action taken, the last action request generated, the last status changed, etc.).
LC (Library of Congress)	A Congressional agency to support the research needs of the U.S. Congress, LC has evolved into a de facto national library of the U.S., creating and distributing bibliographic metadata at minimal cost; developing and maintaining MARC; and providing a myriad of other services to the U.S. library community.
LC (Library of Congress) Classification/Call Number	A system originally developed at LC to organize subjects into broad categories; it is essentially enumerative in nature. It provides a guide to the books actually in a library, not a classification of the world (as Dewey attempts to do). Call numbers derived from the system consist of one or two letters followed by numbers/ punctuation, e.g., PS1742._F6 1897 where PS is American Literature, 1742.F6 further refines the topic of the work, and 1897 is the date of publication and is part of what is called a Cutter number. See Also Call number.
LDAP	Authentication: LDAP, Lightweight Directory Access Protocol, is an Internet protocol that email and other programs use to look up information from a server OR is an application protocol for reading and editing directories over an IP network
LibLime	consulting, implementation, data migrations, for Koha in over 800 libraries
Library Catalog	A library catalog is a register of all bibliographic items found in a library or group of libraries, such as a network of libraries at several locations, such as http://www.iucat.iu.edu
Library of Congress Classification/Call Number	See LC Classification/Call Number.
Library privileges	See Privileges.
Library Technical Services	Common name of primary work unit in libraries that is charged with overall preparation of materials for circulation. After items/titles are ordered/received, found, gifted, this unit (sometimes referred to as Cataloging) prepares materials

to make them available to library staff, patrons, online catalogs, library catalog/discover layer. Common tasks can include: import or completion of the Bib Record; edit or creation of the Instance or Holdings record; bindery; shelf-prep; barcode; in-transit activities; bookplating (gifts); etc. This varies by library and workflows are different for physical items (books, DVDs, maps, etc) than Serial/Subsctiptions (magazines, bound-withs, multi-volume sets), and Electronic resources (URL links, licenses). Special handling/workflows may also be in place for offsite storage activities, Archives, Special Collections.

Library user
: See Patron.

Library user interface
: An application, typically Web/browser based, providing users with the ability to search library and other information databases as selected by the library. In most such products, the basic search type is general keyword (AND as a default operator) with search results from all sources presented by relevancy ranking. These applications typically offer a variety of local configuration options (e.g., indexing choices for each database; display configuration for various record types; etc.); social features such as public reviews, ratings, tagging, and "my list" features; etc. Also included are "my account"-type functions, i.e., the ability for a library user to renew items, check on the status of requests, pay bills, update address information, etc.
See Also Online Catalog.

License
: a right that gives a person or entity permission to do something that would be illegal if the person or entity did not have such permission. Usually the scope of the permission excludes ownership rights or privileges.

Line item
: an entity to be ordered, usually identified by title on a purchase order; any purchase order can have more than one line item, e.g., 10 books on a purchase order = 10 line items, one for each. Intended for ease of purchasing multiple items from one vendor.

Link Resolver
: A service that mediates OpenURL linking to library targets (licensed electronic resources)

Loan
: The process by which the system: (1) validates whether or not a library user can borrow a library item based on defined attributes (e.g., the circulation desk location, the shelving location of the item, item type, borrower type, etc.); and (2) if a loan is permitted, links the item with the patron and applies certain conditions (e.g., length of loan period) based on policies defined in configuration files. Synonyms: Check-out, charge, charge out

Loan Period
: The period of time for which a user has been allowed to borrow a library item. The loan period is usually dependent on the item type, the item's location and the borrower type. A loan period can be expressed in days, hours, as a fixed date, or as "indefinite".

Location
: An element in a library's system configuration that describes a conceptual entity or institution (e.g., "The University of X Library") or a building ("John Doe Memorial Library") or an area ("Doe Library, Bookstacks"; "Doe Library, Circulation Desk") where items are shelved or work is performed. All library items are assigned to a shelving area location and this becomes an attribute for circulation policy. Locations may also refer to library staff work areas at which certain functions (e.g., acquisitions (or ordering and receiving), cataloging, serials receiving, course reserve or circulation are the standard ones) are performed on or

	with items housed at shelving locations; work areas (e.g., a circulation location) are identified as part of an operator's login. See Also Location (shelving).
Location code	A Code value from a Code List that describes, with a greater or lesser degree of specificity, the Location where an Item is located. Within OLE there may be up to five different levels of Location, so the Item may contain as many as five different Location Codes. See Also Code, Code List.
Location ("happening")	See Work Unit.
Location (shelving)	A physical area where library items are housed, generally in single sequence (usually but not always by call number), either permanently or temporarily, and identified in holdings and/or item-level records by codes and/or literals. Shelving location is an attribute in determining circulation policy and can also be used as a search limit. See Also Collection (general), Collection (shelving), Location.
Lost Item Replacement Fee	See Replacement fee.
Lookups	The round magnifying glass or 'lookup' icon on any edoc or screen allows you to look up reference table information so you avoid data entry errors. Multiple lookup and selection is also available. Lookups from an existing document allow a "search select" option to return the selected value to the working edoc.

M

MADS	Content and Metadata; Metadata Authority Description Schema (MADS) is an XML schema developed by the United States Library of Congress' Network Development and Standards Office that provides an authority element set to complement the Metadata Object Description Schema (MODS
Magazine	See Serial.
Magnolia	open source content management systems. See http://www.magnolia-cms.com/magnolia-cms.html
Maintenance document	An e-doc used to establish and maintain a table record.
Manage (Create) Entity Relationship (MER)	OLE component that allows for the creation, modification and deletion of relationships between any two or more entities. Entities can include resources, people, courses, facilities, organizations, finances, etc.
Manage Entity	OLE component that describes the processes that track the lifecycle of an entity including preservation, curation, evaluation, retention, relocation, duplication, version preference, rights management, and updated in this process according to established rules.binding, repair, reformat, replacement, and withdraw. Access and descriptive metadata may be normalized
Manage Funds (Acquire)	process supported by the system to make payment for a service or product. Included in this process is a log trigger and log response; the system records the usage of services or product for audit, reporting or billing purposes.
Manage Inventory (Manage)	process where entity is evaluated and tracked for retention and version preference, and access and descriptive metadata updated.

Manage Rights (Manage)	process where information is maintained (collected, stored, updated) regarding rights of entities. Information is consulted and disseminated as necessary.
Manage Terms of Acquisitions Use (Acquire)	documents and manages acquisitions entities and associated information license terms (e-resources, gift, deposit, exchange, approval, etc.) selected for the collection; record is created with pending status; tracking begins as negotiations and/or evaluation of trial take place; final selection decision is recorded and pending status removed.
Manage User Relationship	an OLE or 3rd party component that describes processes to handle CRM (customer relationship management) including a user's initiation for request of service to the fulfilling of that request.
MARC	MARC (acronym for machine readable cataloging) is a standard for the representation and communication of bibliographic, authority and holdings information in machine-readable form. The structure of MARC records is an implementation of national and international standards, e.g., Information Interchange Format (ANSI Z39.2) and Format for Information Exchange (ISO 2709).
MARC XML	A framework for working with MARC data in a XML environment.
Match point	A data element used to determine a Bibliographic Description/authority record to be replaced by a new Bibliographic Description/authority record in the import process.
Membership order	Membership orders are commitments from a library to purchase a subscription to a membership from a provider. Having a membership may give a library permission to order materials from the provider or might cause the provider to periodically send materials to the library. Generally, memberships are renewed to continue the relationship with a provider.
Metadata	'data about data', metadata defines, describes and manages information and may include descriptive, holdings, authority, financial, or other types of data.
MetricDoc	A reporting tool created by the University of Pennsylvania. Metridoc is a data integration / job framework to assist libraries with data ingestion and normalization, with the end result being a repository to help deal with usage reporting.
METS	Content and Metadata; Metadata Encoding and Transmission Standard (METS) is a metadata standard for encoding descriptive, administrative, and structural metadata regarding objects within a digital library, expressed using the XML schema language of the World Wide Web Consortium. The standard is maintained in the Network Development and MARC Standards Office of the Library of Congress, and is being developed as an initiative of the Digital Library Federation
Middleware	software that manages and connects OLE components and provides interoperability with 3rd party applications and components; consists of a number of functions that can be called upon by multiple components
Modify Entity Relationships (MER)	process that modifies a link between two or more entities. Entities can include resources, people, courses, facilities, organizations, finances, etc.
Modify Metadata (Select, Describe)	process where descriptive, structural, and/or administrative information about an entity is altered

Monographic series	Scholarly and scientific books released in successive volumes, each of which is structured like a separate book or scholarly monograph. See also: series. See Also Series.
MODS	Metadata Object Description Schema is an XML-based bibliographic description schema developed by the United States Library of Congress' Network Development and Standards Office. MODS was designed as a compromise between the complexity of the MARC format used by libraries and the extreme simplicity of Dublin Core metadata.

N

NCIP	NISO (National Information Standards Organization) Circulation Interchange Protocol. This Standard is intended to address the growing need for interoperability among disparate circulation, interlibrary loan, and related applications. Interoperability between self-service applications and circulation applications; between and among various circulation applications; between circulation and interlibrary loan applications; and between other related applications, has been the principal focus of this Standard.
Negotiated License	One specific type of Agreement, which usually covers negotiated access to a purchased resource or collection of resources. The ONIX-PL standard was developed specifically to describe / transport both the text and interpretation of a negotiated license.
Newspaper	See Serial.
NISO (National Information Standards Organization)	A non-profit association accredited by the American National Standards Institute (ANSI); identifies, develops, maintains, and publishes technical standards to manage information in our changing and ever-more digital environment. NISO standards apply both traditional and new technologies to the full range of information-related needs, including retrieval, re-purposing, storage, metadata, and preservation. NISO has a variety of working groups of interest to OLE including those investigating ERM, KBART, CORE, et al.
NLM classification/call numbers	National Library of Medicine - These call numbers cover the field of medicine and related sciences, utilizing schedules QS-QZ and W-WZ, permanently excluded from the Library of Congress (LC) Classification schedules. The NLM Classification is a system of mixed notation patterned after the Library of Congress (LC) Classification where alphabetical letters which denote broad subject categories are further subdivided by numbers.
Notices	Messages sent to borrowers as a result of requests made for library items or the status of current loans of library items, e.g., recall notices, overdue notices, on hold notices, etc. Notices can be printed, emailed or texted.

O

OAI-PMH	Discovery: Open Archives Initiative- Protocol for Metadata Harvesting. http://www.openarchives.org/pmh/tools/
Object Code	Object codes represent all income, expense, asset, liability and fund balance classifications that are assigned to transactions and help identify the nature of the transaction Object Level. The Object Level document is used to maintain an

	attribute of the object code that is used to group similar object codes into categories for reporting Object Consolidation The Object Consolidation document defines a general category of object codes for reporting. One object consolidation includes the object codes belonging to one or more object levels.
Obtain Metadata (Select, Describe)	process where descriptive, structural, and/or administrative information about an entity is acquired.
OCLC	Worlds largest library cooperative, source of WorldCat online catalog (originally the Ohio College Library Center)
ODLIS	Online Dictionary for Library and Information Science, http://lu.com/odlis/
OLE Holding	This section of the OLE Instance records "general" holdings information in a format specific to OLE.
OLE Instance	OLE XML document type that describes individual Holdings and associated Items. The OLE Instance document is a container for recording holdings and item information for a bibliographic record. See also Holdings, OLE Holding, sourceholding and Items.
OLE sourceHolding	This section of the OLE Instance represents "specific" holdings information entered according to some standard external to OLE. Examples are MARC holdings, MODS holdings or any other format specific holdings.
On Hold Courtesy Notice	Notice sent to a patron when a hold has expired and will be removed from the hold shelf. See Also Notices.
On Hold Notice	Notice sent to a patron when a hold is available for pick-up. See Also Notices.
ONIX	An XML-based family of international standards intended to support computer-to-computer communication between parties involved in creating, distributing, licensing or otherwise making available intellectual property in published form, whether physical or digital
ONIX for Books	The ONIX for Books Product Information Message is the international standard for representing and communicating book industry product information in electronic form.
ONIX for Licensing (LT)	ONIX for Licensing Terms (LT) is the generic name for the most recent addition to the ONIX family. Built on a consistent underlying model of rights and usages, OLT formats are specialized to the needs of different user groups and applications.
ONIX for Publications Licensing (PL)	ONIX for Publications Licenses (ONIX-PL) is intended to support the licensing of electronic resources - such as online journals and ebooks - to academic and corporate libraries. ONIX-PL enables libraries to: (1) express licenses in a machine-readable format; (2) load them into electronic resource management systems; (3) link them to digital resources; and (4) communicate key usage terms to users. Publishers can also benefit from the ability to maintain their licenses in a standard machine-readable form.
ONIX for Serials	ONIX for Serials is a family of XML formats for communicating information about serial products and subscription information, using the design principles and many of the elements defined in ONIX for Books.

Online Catalog	The public user interface module of an integrated library system (ILS) that provides the ability to search for and display library resources by various search types and limits. Current online catalogs, while browser based, are typically proprietary applications that have limited capabilities for extending discovery and access to databases external to the library. Online catalogs also typically provide "my account"-type functions, e.g., the ability for a library user to renew items, check the status of requests, update an address, etc. See Also Library user interface.
OPAC	An Online Public Access Catalog (OPAC). See Also Online Catalog.
OpenID	Authentication: OpenID is an open standard that describes how users can be authenticated in a decentralized manner
Open URL	Discovery: OpenURL is a standardized format of Uniform Resource Locator (URL) intended to enable Internet users to more easily find a copy of a resource that they are allowed to access. Although OpenURL can be used with any kind of resource on the Internet, it is most heavily used by libraries to help connect patrons to subscription content
Operating funds	This is unrestricted money from the parent organization. In universities, this money typically comes from sources like tuition. Often, the library receives a lump sum of operating money from its parent body, and then decides internally how much of that to allocate for collection development.
Operator	a person who creates/updates/deletes a document online and typically recorded as such in a document's audit trail.
Operator (Circulation)	Operators log into OLE to do work. They perform work on behalf of patrons in the system.
OPLE	Open source software package developed by EDItEUR for creating, editing and managing license expressions using ONIX-PL. OPLE can be installed on a wide range of computer platforms from large network servers to individual laptop PCs and is compatible with all major operating system environments (Microsoft Windows, Apple Macintosh, Linux).
Order Resource (Acquire)	obtain collection resources, with associated functions to manage providers. In the case of acquiring digital material it is a process whereby a system manages content in order to bring it into a collection.
Order status	a label describing the purchase order's stage in the overall acquisition process from, e.g., "new" to "received/paid". Overlaps with item status.
Order type	a label describing characteristics of the order that indicate what future actions will apply. Required for any purchase order.
Organization	an OLE entity, an organization is an administrative structure, for example a college or university, library, institution, society, consortium, or association.
Overdue Fine	The amount charged to a borrower when a loaned library item is returned late. Overdue fines are calculated at checkin, based on an amount per day/hour, and may vary depending upon the borrower type, the item's location and the item type.
Overdue Recall Fine	The amount charged to a borrower when a loaned library item that has been recalled is returned late. Recall overdue fines are calculated at checkin, based on

an amount per day/hour, and may vary depending upon the borrower type, the item's location and the item type.

Ownership — The idea that permissions or policies based on a piece of data in a document (bib control numbers, item location, ownership field data) could be used to infer ownership, in conjunction with policies. Work Units or Roles would be connected or allowed to complete certain actions based on additional qualifier for ownership.

P

Package — A grouping of TIPPs offered by a supplier under particular terms.

Page — The ability for a patron/borrower to ask that an item not on loan be retrieved and either placed on hold (for the user to pick-up at a specified location for checkout) or be delivered (the item is retrieved, checked out, and then routed/physically delivered to the user).

Patron — An individual who has some level of library privileges. A person with access to a library (virtual or physical) and identified as belonging to a specific group, e.g., faculty, undergraduate, unaffiliated, etc. Each group may have different levels of service privileges, e.g., faculty have indefinite loan periods when borrowing items, undergraduates can borrow for 90 days, etc. Terms such as "patron", "library user", "user", or "borrower" are often used interchangeably.

Patron body — Main part of an OLE patron record containing data NOT in a patron component.
See Also Patron component.

Patron component — Repeatable segments of an OLE patron record: (1) address; (2) affiliation; (3) barcode; (4) identifier; (5) borrower type; and (6) note. Other information is in the patron body.
See Also Patron body, Affiliation (patron).

Patron Infrastructure type — a generic way to refer to borrower type, address type, affiliation type, identifier type, and note type. This is again not a term that should be exposed to end users but is useful to talk about all the types together. Right now they all have quite a bit in common although as OLE becomes more sophisticated they will vary from each other more.

Payment Request/ Invoice — Vendor Invoices are processed thru an OLE Payment Request, and represent money owed/due to a Vendor for products or services.

P-Card — Synonym for credit card, also called procard

Permissions — Permissions represent fine grained actions that can be mapped to functionality within a given system. Permissions are scoped to Namespace which roughly correlate to modules or sections of functionality within a given system. (A permission says something a role's users can do)

Periodical — See Serial.

Person — an OLE entity, a person is an individual represented in the environment. A few examples of persons include a user of a resource (such as a library user), a creator of a resource (such as an author), or a creator of metadata (such as a library staff member).

Pickup	Indicates that patron will come to the library to retrieve items set aside on his behalf. See Also Request.
Piece	A component of an item, e.g., a CD jewel case of 3 CDs would typically be treated as 1 item with 3 pieces. See Also Item.
Platform	An interface that administers or delivers electronic resources content, or provides a route to the content, to the user. A single publisher may have multiple platforms, eg: Elsevier has Science Direct, Scopus, and Compendex/Engineering Village. The platforms of one publisher may or may not be integrated in one administrative site.
Platform Administrative Site	Many platforms provide librarians with an interface for managing and customizing the display and other attributes of their platform. This interface (accessed via a URL) allows librarians to enter their institution's IP ranges, input their link resolver URL, manage the look and feel of the platform for their users, gather usage stats, etc. The interface is password protected.
Platform Provider Name	Name of company that hosts the platform, eg: EbscoHost, Proquest, Gale Cengage
Platform Software	The underlying architecture that runs a platform. A platform may belong to Oxford University Press, but run on the Highwire platform software.
Pluggable Framework	OLE infrastructural middleware that allows separately installable software modules to interact seamlessly in the environment. This provides for increasing functionality of the system with components that are not built-in.
POJO	POJO is an acronym for Plain Old Java Object. The name is used to emphasize that a given object is an ordinary Java object and not a special object.
Polaris Library Systems	Library automation solutions. See www.gisinfosystems.com/
Policy/Business Rules	OLE infrastructural middleware, Policy/Business Rules modifies workflows based on locally defined policies
Prediction pattern	A set of descriptive data (enumeration, chronology, frequency) enabling a system to generate a listing of future issues.of a serial. This data enables a system to show an operator the next expected issue which in turn allows for a quick and easy method of recording receipt of each issue.
Pre-Disbursement Processor	A KFS module and core component that receives data from systems that need to make disbursements and outputs a data file that can be sent to a check writer or formatted and sent to a bank for Automated Clearing House (ACH) direct deposits. Generates ledger entries when appropriate. (for example, to relieve liabilities when making a disbursement against a KFS Payment Request document)
Pre-order request	A collection of metadata describing a title (in any format) requested by library staff or outside users for addition to the library's collection.
Pre-Order Request Document	A Kuali OLE document containing a pre-order request's metadata along with data concerning the request type.
Preserve/Conserve (Entity) Resource (Manage)	process that tracks the preservation and curation of an entity that needs attention in regard to preservation/conservation activities including evaluation, binding,

repair, reformat, replacement, and withdraw. Access and descriptive metadata may be updated in this process. Determine whether the item should be relocated to archives/special collections.

Primary Delegation
: The Delegator turns over full authority to the Delegate. The Action Requests for the Delegator only appear in the Action List of the Primary Delegate. The Delegation must be registered in KEW or KIM to be in effect.

Principal
: In KIM, a principal reflects a method that an entity uses to log in to the system, for instance a username/password pair. One entity can have multiple principals when a single individual has more than one way to authenticate themselves. We will not use principals for patrons at all.

Printing
: Printing slips as part of transfers, sending items to bindery, shelf preparation.

Privileges
: Library services (many related to circulation) available to users, e.g., the ability to borrow items for periods of time; recall checked out items; order copies of library materials; gain access to a library building; etc. Certain services may be restricted to certain categories or types of users.

Process
: a loosely coupled series of operations or activities that achieve a library business goal.

Processed
: A routing status indicating that the document has no pending approval requests but still has one or more pending acknowledgement requests.

Project Manager
: A project manager is the person responsible for accomplishing the stated project objectives. Key project management responsibilities include creating clear and attainable project objectives, building the project requirements, and managing the constraints of the project management triangle, which are cost, time, scope, and quality.

Proposition
: In KRMS, rules consist of propositions and actions. A proposition is made up of terms and facts. KRMS supports three main types of propositions:

1. Simple Propositions - a proposition of the form "lhs op rhs" where lhs=left-hand side, rhs=right-hand side, and op=operator
2. Compound Propositions - a proposition consisting of more than one simple proposition and a boolean algebra operator (AND, OR) between each of the simple propositions
3. Custom Propositions - a proposition which can optionally be parameterized by some set of values. Evaluation logic is implemented "by hand" and returns true or false.

See Also Rule, Term, Fact.

Proxy
: A system that acts as an intermediary for authenticating authorized users accessing licensed electronic resources from an IP address outside of the registered institutional IP ranges.

Public-facing Service
: Any service/system that allows public users to query a library's database. Examples include discovery layers (such as VuFind) and Z39.50.

Public receipt
: In the Receipt History section of the Serials Receiving record, these are issues that have the "Public Display" checkbox checked

Purchase order	A document describing an entity to be bought or licensed along with vendor, fund, order type and other related data; OLE uses an adaptation of the Kuali Financial System's purchase order.

Q

Quality Assurance Manager	Quality assurance (QA) refers to the planned and systematic activities implemented in a quality system so that quality requirements for a product or service will be fulfilled.[1] It is the systematic measurement, comparison with a standard, monitoring of processes and an associated feedback loop that confers error prevention.

R

RDA (Resource Description and Access)	Designed for the digital world and an expanding universe of metadata users, RDA is the new, unified cataloging standard - an evolution of the cataloging principles from AACR2, Second Edition with rules carried over or adapted to the RDA model.
RDBMS (Relational Database Management System)	The Relational Database Management System (RDBMS) is a database model that stores information about both the data and how it is related. Relationships exist both among the columns within a table and among the tables. Each database is a collection of related tables.
RDF (Resource Description Framework)	A standard model for data interchange on the Web.
Recall Request	The ability for a patron/borrower to ask that an item currently on loan to another patron/borrower be returned. In most libraries, a recall request abbreviates the loan period for the current borrower who typically receives a notice with the new due date/time. In addition, fine rates applied for late return of recalled items are often higher than fine rates for late returns of an item without a recall request. See Also Request, Hold Request.
Receive Resource (Acquire)	process where a resource or service is received in response to request, for example an order request, a request for a service or resource, a gift.
Recurring Order	A purchase order with the “Type of Recurring Payment” field populated.
Reference Model	provides an abstract view of how the environment functions and the relationships between the various components, entities, and middleware. The reference model provides a foundation upon which the architecture of the system, and the concrete details, will be built.
Reformat Resource (Manage)	process where resource is selected, retrieved and converted; content is duplicated; access and descriptive metadata are updated.
Reformating	Converting a document from one format to another without changing its content
Relais	Relais International provides highly sophisticated systems and software to automate and streamline operations in traditional ILL, Document Delivery and consortial resource sharing services as well as for services supporting on campus delivery and distance education programs

Renew(al)	For circulation, the process/policy for extending the loan period of a borrowed library item. For acquisition, the process/policy for paying for a resource that is obtained on a periodic basis (e.g., continuing a subscription to a journal; obtaining access to an electronic database for a specified length of time; etc.).
Renewal (for E-Resources)	The process by which by a library extends its subscription to a resource to cover the next subscription period. Typically done in yearly increments.
Replacement fee	When a borrowed library item is not returned after a series of overdue notices, the system automatically creates and sends a replacement fee borrower bill to the borrower. The fee is either a default value defined in the circulation policy sets OR is the price entered in the item-level record.
Report Management	a 3rd party component to OLE that aids in the creating, viewing, and printing of reports. The software may provide an interface that will assist with the selection and extraction of data. This component may communicate with OLE through the report manager in the OLE middleware.
Report Manager	OLE infrastructural middleware reporting application that provides a connection between OLE, its data, and 3rd party report management software. The report manager may assist with the selection and extraction of data according to a particular type of report, as specified through the 3rd party report management software or through the policy/business rules middleware in OLE.
Repository	the OLE middleware that provides a registry of services. The repository manages the services to support their development, discovery, and use. Information about the services can be found here which could assist potential users with determining whether a service will meet their particular need, who maintains that service, etc.
Repository Management	an OLE 3rd party component that performs import, storage and basic integrity checks and preservation of entities stored in a repository.
Request	The ability of a library user/borrower to ask for services relating to the retrieval, loan or copying of an item in the library's collections. Such requests are now typically submitted online through a public interface that must interact with the library's "back office" system. See Also Recall Request, Hold Request.
Request Expiration Date	The date at which the hold will expire for a patron. The date is equal to X days after the hold notice was sent (as defined in the Circulation Desk maintenance document) and calculated when hold notice batch processes are run. The date is editable from the request screen by staff.
Request Service (Deliver, MUR)	process where resource is requested from a resource provider or data source, or where a user initiates a request for service. The process will take into account whether the resource or service is available and can be requested by the user based on access and use policies.
Requestor	A library user who submits a request for the library to purchase a title, recall a checked out item, page an item on the shelf, etc. See Also Patron.
Requisition	A pre-order document for a title being considered for acquisition as submitted by a library user or library staff using various input methods (e.g., submitting a Web form, manual keying, etc.) Default workflow is for a requisition to be approved by a selector and, upon supply of information such as vendor, fund, etc.,

	be transformed into a purchase order. Selectors may also decide against acquisition and cancel the requisition with notice to the original requestor.
Resource	an OLE entity, a resource is an item that may be collected and/or made available by an organization. Common examples of resources include books, journals, maps, and websites
Retired TIPP	A TIPP is retired when it no longer has any content remaining in a Package. The retired status allows users to see that the TIPP used to be part of a certain package, but is no longer available. See Also TIPP.
Return	The process by which the system: removes the temporary linkage between an item loaned by the library to a patron; calculates any overdue fines or penalties to be charged to the patron; and resets the item status to indicate its next state (e.g., "not checked out", "in transit", "on hold", etc.). Synonyms: Check-in, discharge
Rights Management	process where information regarding rights of entities is collected, stored, and updated. For example, the license terms of an entity that is acquired are reviewed, approved, and retained. Rights information is consulted and disseminated as necessary, for example, a resource that has been requested is checked for terms of access and preconditions of use. Rights management may be performed by an OLE component or 3rd party component.
Role Qualifier/Parameter	OLE Roles or Groups will be extended to include optional qualifiers or parameters on applied permissions. A Role or Group can continue with no qualifiers, or multiple.
Roles- Permissions	We can apply access, use, permissions at system, organization, group, role, or user level, so that users can belong to different groups with different access, permissions, or actually responsibilities/assignments in workflow.
Route Log	Displays information about the routing of a document. The Route Log is usually accessed from either the Action List or a Document Search. It displays general document information about the document and a detailed list of Actions Taken and pending Action Requests for the document. The Route Log can be considered an audit trail for a document.
Route Status	The status of a document in the course of its routing: • Approved: These documents have been approved by all required reviewers and are waiting additional postprocessing. • Cancelled: These documents have been stopped. The document's initiator can 'Cancel' it before routing begins or a reviewer of the document can cancel it after routing begins. When a document is cancelled, routing stops; it is not sent to another Action List. • Disapproved: These documents have been disapproved by at least one reviewer. Routing has stopped for these documents. • Enroute: Routing is in progress on these documents and an action request is waiting for someone to take action. • Exception: A routing exception has occurred on this document. Someone from the Exception Workgroup for this Document Type must take action on this document, and it has been sent to the Action List of this workgroup.

- Final: All required approvals and all acknowledgements have been received on these documents. No changes are allowed to a document that is in Final status.
- Initiated: A user or a process has created this document, but it has not yet been routed to anyone's Action List.
- Processed: These documents have been approved by all required users, and is completed on them. They may be waiting for Acknowledgements. No further action is needed on these documents.
- Saved: These documents have been saved for later work. An author (initiator) can save a document before routing begins or a reviewer can save a document before he or she takes action on it. When someone saves a document, the document goes on that person's Action List.

Routing an Item
: Libraries route items from one circulation desk to another when an item is received at one circulation desk but should be shelved by another.

RSS/Atom
: Delivery: RSS (Really Simple Syndication) is a family of web feed formats used to publish frequently updated works- XML. The Atom Syndication Format is an XML language used for web feeds, while the Atom Publishing Protocol (AtomPub or APP) is a simple HTTP-based protocol for creating and updating web resources

Rule
: In KRMS, a rule contains a proposition and an action. Rules are the policy set within the system.
See Also Policy/Business Rules, Proposition, Action.

Rules Engine
: See Policy/Business Rules

S

Sakai
: Open source application to support technology-enabled teaching, learning, research and collaboration in academic institutions. See http://sakaiproject.org/

Saved
: A routing status indicating the document has been started but not yet completed or routed. The Save action allows the initiator of a document to save their work and close the document. The document may be retrieved from the initiator's action list for completion and routing at a later time.

Schedule Event (Acquire, MUR, Rice)
: process that manages the scheduling of events based on policy implemented by the workflow engine. Provides check interval and deadline for certain actions such as claim, audit, renew, review, deliver.

SCONUL
: The SCONUL effort is currently focused on gathering use cases with an eye towards requirements for Electronic Resource Management in July 2011. David Kay is involved in OLE due to the alignment of our projects, the potential benefits to both projects if we work towards a common framework (built on Kuali Rice, KFS and OLE), and the sharing of process, resources, and requirements across our projects. This is a JISC-funded (Higher education funding agency in the UK) SCONUL-managed (HE Academic Library Council in the UK) project to develop a national academic library system that addresses many of the efforts of Kuali OLE

Secondary Delegation
: The Secondary Delegate acts as a temporary backup Delegator who acts with the same authority as the primary Approver/the Delegator when the Delegator is not

	available. 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. Secondary Delegation is often configured for a range of dates and it must be registered in KEW or KIM to be in effect.
Select Entity	describes the processes where metadata for an entity that has been selected for acquisition or trial, either permanently or temporarily, are created or obtained.
Select- Delete	See Delete Metadata
Select-Approve/Reject	New-
Select-Create	See Create Metadata
Select-Modify/update/use	See Modify Metadata
Select-Obtain	See Obtain Metadata
Selector	a library staff member with authority to purchase titles for a library's collection.
Separate Copy Report	An OLE Instance which includes information about a single Copy only. See Also Copy, OLE Instance.
Serial	A serial is a publication (in any format, most often print, microform or electronic) that is issued in successive parts (issues); serials include publications commonly referred to as magazines, newspapers, periodicals, journals, etc. A serial is usually published at intervals (i.e., a frequency, e.g,. quarterly, weekly, daily, etc.) with each issue often (but not always) identified by a number (i.e., enumeration, e.g., v. 7, no 1) and/or date (i.e., chronology, e.g., July 2009). Some serials have an irregular or unknown frequency and may also lack enumeration or chronology but are, nevertheless, considered serials. Enumeration and chronology can have multiple levels, each with a descriptive caption used for display purposes. See Also Subscription, Caption, Enumeration, Chronology.
Serial claim	See claim.
Series	A group of titles, usually on the same or related topics, issued under the same name (i.e., a series title) over a period of time. Each individual title may (or may not) have a series volume number and often has its own distinct title in addition to the series name. E.g., Lecture Notes in Mathematics volume 345 is the title "Proceedings of a Conference on Operator Theory, Dalhousie University, Halifax, Nova Scotia, April 13 and 14th, 1973". In many cases, libraries create records to allow users to find series volumes by either the series title/number AND by the individual title of a single volume in the series. These are called "analyzed series" or "analytics".
Series Holding Record	A holdings record for a monographic series (distinguished from a holdings record for an individual work in the series. See Also Analytic Holding Record.
SERU	Shared Electronic Resource Understanding (SERU) - licensing agreements service between libraries and publishers
Service	a well-defined, reusable set of operations, services are independent software pieces that are the building blocks used to assemble library business processes in OLE.

Service Mediator	as part of the OLE middleware, the service mediator aids communication between system-level service consumers and service providers. As consumers request services, the mediator negotiates between the consumer and the provider to manage the service request and its delivery.
Service Oriented Architecture (SOA)	the design approach that will be used to develop OLE, Service Oriented Architecture provides for loosely coupled, reusable services, and methods for allowing different functionality and communicate with other systems.applications to exchange data. By using SOA design architecture, OLE will describe a system that is can add new
Service Taxonomy	an index and classification of the services used in OLE. The taxonomy provides definitions of the services, helping to build a common and accepted language among OLE users.
Shelflist	A file of bibliographic records arranged in the same order as the corresponding materials on a library's shelves.
Shelflisting	Arranging library materials within an existing collection, normally by author; and determining the book number and other additions to the classification number necessary to create a unique number for each item. Shelflisting is also the activity of documenting the holdings of a collection as to location, volumes, and copies, providing an inventory of the collections (from: LC Classification and Shelflisting Manual, 2008).
Shelf Prep	Physical preparations of tangible library materials, that may include standard cataloging (barcode, call number, etc), plus physical preparation external to OLE. May be managed via notifications or cataloging checklist in OLE.
Shibboleth	Proxy or Authentication: A standards based, open source software package for web single sign-on across or within organizational boundaries. It allows sites to make informed authorization decisions for individual access of protected online resources in a privacy-preserving manner. http://shibboleth.internet2.edu/
Single Sign On	A mechanism for authenticating authorized users accessing licensed electronic resources using a single log-in for accessing all applications (i.e. Shibboleth)
SIP2	Document and Resource Delivery: Standard Interchange Protocol 2 for library automation. http://www.niso.org/workrooms/sip/
SirsiDynix	Commercial vendor of ILS systems Symphony,Unicorn and Horizon; discovery tool Enterprise.
SKOS	Content and Metadata
SOAP	SOAP, originally defined as Simple Object Access Protocol, is a protocol specification for exchanging structured information in the implementation of web services in computer networks. It relies on XML information set for its message format, and usually relies on other application layer protocols, most notably Hypertext Transfer Protocol or Simple Mail Transfer Protocol, for message negotiation and transmission.
SOLR	Solr is an open source enterprise search platform from the Apache Lucene project. [Penn and other libraries are using Solr to develop library discovery tools--AKA catalogs] http://lucene.apache.org/solr/

sourceHolding	This section of the OLE Instance represents "specific" holdings information entered according to some standard external to OLE. Examples are MARC holdings, MODS holdings or any other format specific holdings.
Source record	Record from which another record receives data from.
SPARQL	Discovery: an RDF query language; its name is a recursive acronym that stands for SPARQL Protocol and RDF Query Language
SQL	Reporting: is a database computer language designed for managing data in relational database management systems
SRU/SRW	Discovery: SRU is a standard XML-focused search protocol for Internet search queries, utilizing CQL (Contextual Query Language), a standard syntax for representing queries. SRW is a variation of SRU. Messages are conveyed from client to server, not by a URL, but instead using XML over HTTP via the W3C recommendation SOAP, which specifies how to wrap an XML message within an XML envelope.
Staff	For the purpose of OLE specs, Users or Staff may be used interchangeably to denote authorized library staff or system users. Library SME's prefer the term Staff or Operator, as in the library world, "users" is often construed as synonymous with "patrons" or "users of the library". Synonyms: User, Staff, Operator, (KIM) Person
Standard number	a numeric or alpha-numeric string with or without punctuation used as a unique identifier for an item; some standard number types have established validation rules, e.g., ISBN and ISSN.
Standing order	Standing orders are commitments from a library to purchase (sometimes after approval) all titles from a provider that fit within a predestinated profile (Author, subject, publisher, etc.) The titles to be sent from the provider are often not known until they are received at the library. The library processes each title as it is sent from the provider by describing it, receiving it, and invoicing it. Unless discontinued, a standing order will be modified by year-end so that it continues into each new fiscal year. Unlike subscription orders, standing orders are "continued" as opposed to "renewed". A standing order may also be called a blanket order.
Staff Only	A flag on record (bibliographic, holdings, item) that, when checked, marks the record so it does not display in a public-facing service.
Status	On an Action List; also known as Route Status. The current location of the document in its routing path. See Also Route Status.
Subfield	The code used to separate pieces of information in the bibliographic record, such as separating the title from the author: 245 04 |a The life and times of a cataloger / |c Frieda B. Cataloger, where the "a" and "c" that proceed the delimiter | are the subfield codes.
Submit	A workflow action button used by the initiator of a document to begin workflow routing for that transaction. It moves the document (through workflow) to the next level of approval. Once a document is submitted, it remains in 'ENROUTE' status until all approvals have taken place.
Subscription	A subscription is an order for a title that is published in parts over time, often (but not always) on a set schedule, where each part often (but not always) has a

	specific numeric and/or chronological identifiers. One can subscribe to a journal for a specific period of time (e.g., a year's subscription to the New Yorker) or to a package of e-journals licensed for a specific period of time (e.g., EBSCOHost Business Source Complete). Subscriptions are renewed (typically annually) to ensure continuous receipt/access.
Subscription start date; subscription end date	Beginning and end dates of the term of covered by the most recently paid order.
SuDoc (Superintendent of Documents) Classification/Call Number	A system to organize publications of the U.S. government based on the issuing agency. Call numbers derived from this system describe the agency, a subunit, type of publication, title, etc., e.g., HE 3.3:15/2 where HE is the agency; 3 is a bulletin, .3 is the title and 15/2 is the volume and issue number. See Also Call number.
Superintendent of Documents Classification/Call Number	See SuDoc (Superintendent of Documents) Classification/Call Number.
Superuser	A user who has been given special permission to perform Superuser Approvals and other Superuser actions on documents of a certain Document Type.
Supervisor Override	A supervisor override allows an operator to approve a loan when another operator does not have sufficient permission to approve it.
Supply Entity (Deliver)	process where an appropriate entity is supplied subject to conditions or constraints on use.

T

Talis	Commercial vendor of ILS system Talis Alto and discovery tool Talis Prism.
Target record	Record (Bibliographic Description or OLE Instance) to which a record (OLE Instance or Item Description) is being transferred.
Term	In KRMS, a named variable used to build propositions. See Also Proposition.
TIPP	(from GOKb) An electronic resource distinguished by a unique combination of Title Instance, Package, and Platform. It represents, at the most granular level, the resource a library has purchased.
Title	An identifying name assigned to an intellectual entity, e.g., a book, DVD, map, serial, music recording, etc. See Also Format, Copy, Item, Uniform Title.
Title instance	(from GOKb) A publication distinguished by a unique combination of title, publisher, and ISSN.
Title-level	To request any one of multiple copies of a work where there are mulitple item records attached to a bibliographic record. See Also Request.
Track Event (Acquire, MUR, Rice)	process that enables tracking the status of an event, a resource, a request, or a task at any given point in the workflow.
Transfer	A change in the physical custody of archival materials from one location or agency to another, usually without a corresponding change of legal ownership

	and responsibility. In OLE, Users may move Instances to other Bibs; Items to other Instances. Global edits can provide functionality for relocating or moving (physically) the actual Items, updating Location information. Transfers are subject to document ownership and status rules.
Trial	Access to a particular e-resource on a particular platform for a limited time period, usually 30 days, to evaluate an e-resource.
Triggers	When writing specifications, triggers describe the event(s) that cause the user story to be initiated

U

UI	User Interface, also GUI (graphical user interface).
UIF	Built upon a rich JQuery library of Standards as part of KRAD, UIF (User Interface Framework), includes, Light boxes, Messages and Notifications, Progressive Disclosure, Client Side Validation, Table Tools, Themes and AJAX Enabled Fields and are no longer limited to the vertical tab layout of KNS.
Uniform Title	The standardized form of a title that has been issued in different versions using many variations of the original title. For example, "Huck Finn", "Mark Twain's Huckleberry Finn" and "Huckleberry Finn" all share the same content, i.e., the work written by Mark Twain. When creating metadata for any one of these titles, a librarian would include the standard form of the title (in this case, it's "Adventures of Huckleberry Finn") thus allowing users to find a listing of all versions in a library's collection. Uniform titles are most often established for literary classics; musical compositions; and religious texts (the Bible and the Koran being the most famous examples of the latter). Uniform titles are established in the U.S. by the Library of Congress (and its various cataloging partners) and are available to libraries via services such as OCLC.
URL	Uniform resource locator: a web address; a character string that refers to an internet resource
Use Case	an example that illustrates the potential application of OLE, its components, and its processes. Use cases might be abstract or concrete. They help provide meaning to the functionalities of OLE. See Also User Story.
User	See Staff.
User Interface	See GUI.
User Story	A user story is a software system requirement formulated as one or more sentences in the everyday or business language of the user. User stories are used with Agile software development methodologies for the specification of requirements (together with acceptance tests).

V

Variable Field	MARC fields for which the length of the field varies, as the length is dependent upon the data that is entered into the field. All fields except 00X are variable data fields. (see http://www.loc.gov/marc/96principl.html#eight)

Vendor	an organization or individual supplying materials for purchase, exchange or at no cost; KFS term is "supplier". Companies or non-profits businesses with which a library has a business relationship. They may play one or many roles in the e-resource management world. Eg: Ebsco Publishing licenses its databases and hosts (on their own platform) those same databases. However, they do not bill direct to libraries.
VRA	Content and Metadata; Visual Resources Association, a library association for image media professionals, or, Video Recordings Act 1984
VTLS	Commercial vendor of ILS system Virtua

W

Web Services	a software component that supports machine-to-machine transactions over a network, in particular, over the Internet.
Wild Card	A character that may be substituted for any of a defined subset of all possible characters.
Work Location	See Work Unit
Work Mark	A letter (or combination of letters) placed after the Cutter number to help maintain alphabetical order on a library's shelves and to create a unique call number for each work. The work mark is usually the first letter of the first important word in the title.
Work Unit	A location or departmental, or organizational field, used to as an attribute or match point between documents and Roles/Permissions. The Work Unit will be compared between a Document and as a qualifier on a Role, in order for Permissions/Policy to designate what staff can perform which actions on a document. Work units can be designated with parent-child relationships, to allow easier creation of roles/permissions across work units (one parent work unit can include or cover multiple child work units). Note: while locations hierarchy could be replicated for Work units, it is more granular than work units or document ownership designations may need to be. Work units and document ownership will frequently be at the Library level.
Workflow	a series of activities that involve people, business processes, and software that achieve a library business goal
Workflow Engine	See Business Process Engine.
WorldCat	Online catalog representing holdings of more than 72,000 libraries worldwide.
WorldCat Selection	Allows selectors of new materials at a library to view notification records from multiple materials vendors in one central system and access participating vendors' systems directly from WorldCat Selection.
WSDL	WSDL is an acronym for Web Services Description Language. It is an XML-based interface definition language that is used for describing the functionality offered by a web service. The acronym is also used for any specific WSDL description of a web service which provides a machine-readable description of how the service can be called, what parameters it expects and what data structures it returns.

X

X12	"The Accredited Standards Committee (ASC) X12, chartered by the American National Standards Institute in 1979, develops electronic data interchange (EDI) standards and related documents for national and global markets." http://www.x12.org/
XC (eXtensible Catalog)	An open source, user-centered, next generation software for libraries. It comprises four software components that can be used independently to address a particular need or combined to provide an end-to-end discovery system to connect library users with resources.
XHTML	Delivery: the next generation of HTML, compliant with XML standards
xISBN (Web service)	Use this Web service to retrieve a list of International Standard Book Numbers (ISBNs) associated with a submitted ISBN, based on WorldCat information. Free and subscription versions are available. The xISBN Web service supplies ISBNs and other information associated with an individual intellectual work that is represented in WorldCat. Submit an ISBN to this service, and it returns a list of related ISBNs and selected metadata. Ideal for Web-enabled search applications - such as library catalogs and online booksellers - and based on associations made in the WorldCat database, xISBN enables an end user to link to information about other versions of a source work
XML	Delivery: Extensible Markup Language (XML) is a set of rules for encoding documents in machine-readable form
XML ingester	A workflow function that allows you to browse for and upload XML data.

Y

YBP (Yankee Book Peddler)	YBP provides books and supporting collection management and technical services to academic, research and special libraries around the world. Owned by Baker & Taylor.

Z

Zotero	Zotero [zoh-TAIR-oh] is a free, easy-to-use tool to help you collect, organize, cite, and share your research sources. It lives right where you do your work - in the web browser itself. http://www.zotero.org/