

Guide to the OLE System Administration Module

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Introduction

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

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

Note

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

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

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

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

Note

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

This guide as well as guides to other OLE modules are available for download from the [OLE Documentation Portal](#).

Tip

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

Chapter 1. Batch Processes

Administrative Documents

- [Batch File Type](#)
- [Batch Process](#)
- [Batch Process Filter Criteria](#)
- [Batch Process Job Details](#)
- [Batch Process Profile](#)
- [Batch Process Schedule](#)
- [Batch Process Type](#)

OLE FS Batch

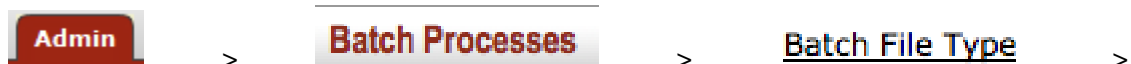
- [Batch File](#)
- [Batch/Scheduled Jobs](#)
- [Batch Semaphore File Upload](#)
- [Deliver Batch Job](#)
- [Schedule](#)
- [Special Batch File Upload](#)
- [Compute Loan Overdue Notice Dates](#)



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

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

Batch File Type



Batch File Type Lookup

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

Note

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

Batch File Type Lookup

① Lookup Results: 1 message

| | |
|------------|----------------------|
| Id: | <input type="text"/> |
| File Name: | <input type="text"/> |
| File Type: | <input type="text"/> |
| Data Type: | <input type="text"/> |

• 3 items retrieved, displaying all items.

Show entries

| Id | File Name | File Type |
|----|-----------|-----------|
| 4 | XML | XML |
| 5 | EDI | EDI |
| 6 | MRC | MRC |

Showing 1 to 3 of 3 entries

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

Batch Process



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

Process Overview

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

Batch Process[?]

| | | | |
|-----------------------|----------------|---------------------|---------------------|
| Document Number: | 9737 | Document Status: | INITIATED |
| Initiator Network Id: | ole-quickstart | Creation Timestamp: | 12:28 PM 03/06/2015 |

* indicates required field


Batch Process Section

| | |
|---------------------|------------------------------------|
| Batch Process Name: | <input type="text"/> |
| Batch Process Type: | <input type="text"/> |
| Batch Size: | <input type="text" value="10000"/> |
| Send Job Report To: | <input type="text"/> |

Please enter multiple email id's separated by comma (,)

Run Now Schedule

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

2. Choose the **Batch Process Profile**. You must search for it from the lookup  .
3. Modify the **batch size** if necessary. This is the number of records to import or export per batch.
 - For example, if you are exporting a database of seven million records, you might specify a batch size of one million and OLE will process the output in batches of one million.
 - However if you are importing records and you specify a lesser number of records to import than what exists in your file, the Batch Process will only import the specified number of records and not the full amount in your file.
4. If you wish to receive the batch process job report via email, enter your email in **Send Job Report To**.

If you do not want to receive email notifications, you may also check the listing of job outputs from the **Batch Process Job Details** interface (see [below](#)).
5. Depending on the **Batch Process Type** (auto-populated when the **Batch Process Profile Name** is selected), an **Input Section** or an **Output Section** will appear.
 - **Output Section** is made available for exporting records types. Select the **Output Format** (MARC or MARCXML) from the drop down.

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

Note

A note on naming the Output File:

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

This is a known bug to be fixed in a future release. See [OLE-6603](#).

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

Batch Processes Administrative Documents

Batch Process²

| | | | |
|-----------------------|----------------|---------------------|---------------------|
| Document Number: | 4064 | Document Status: | INITIATED |
| Initiator Network Id: | ole-quickstart | Creation Timestamp: | 02:11 PM 06/23/2014 |

* Indicates required field

Batch Process Section

| | |
|--|---|
| Batch Process Name: | <input type="text"/> |
| Batch Process Profile Name: | Test_Batch_Export_BibOnly_Full <input type="text"/> |
| Batch Process Type: | Batch Export |
| Batch Size: | 10000 |
| Send Job Report To: | <input type="text"/> |
| <small>Please enter multiple email id's separated by comma (,)</small> | |

Output Section

| | |
|--------------------------------------|----------------------|
| Output Format: | Marc |
| Maximum Number of Records in a File: | 100000 |
| Output File Name: | <input type="text"/> |

Run Now Schedule

Submit Close Clear Cancel

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

Batch Process Section

| | |
|--|--------------------------------------|
| Batch Process Name: | <input type="text"/> |
| Batch Process Profile Name: | Test_Bib_Import <input type="text"/> |
| Batch Process Type: | Bib Import |
| Batch Size: | 10000 |
| Send Job Report To: | <input type="text"/> |
| <small>Please enter multiple email id's separated by comma (,)</small> | |

Run Now Schedule

Input Section

| | | |
|--------------|-----------|-------------------|
| Upload File: | Browse... | No file selected. |
|--------------|-----------|-------------------|

Submit Close Clear Cancel

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

Batch Process Section

| | |
|--|--|
| Batch Process Name: | <input type="text"/> |
| Batch Process Profile Name: | Test_Order_Import <input type="text"/> |
| Batch Process Type: | Order Record Import |
| Batch Process KRMS Profile: | YBP |
| Batch Size: | 10000 |
| Send Job Report To: | <input type="text"/> |
| <small>Please enter multiple email id's separated by comma (,)</small> | |

Run Now Schedule

Input Section

| | | |
|-------------------|-----------|-------------------|
| Upload Marc File: | Browse... | No file selected. |
| Upload Edl File: | Browse... | No file selected. |

Submit Close Clear Cancel

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

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

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

Note

A note on naming the Output File:

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

This is a known bug to be fixed in a future release. See [OLE-6603](#).

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

Batch Process²

| | | | |
|-----------------------|----------------|---------------------|---------------------|
| Document Number: | 4064 | Document Status: | INITIATED |
| Initiator Network Id: | ole-quickstart | Creation Timestamp: | 02:11 PM 06/23/2014 |

* Indicates required field

Batch Process Section

| | |
|--|---|
| Batch Process Name: | <input type="text"/> |
| Batch Process Profile Name: | Test_Batch_Export_BibOnly_Full <input type="text"/> |
| Batch Process Type: | Batch Export |
| Batch Size: | <input type="text" value="10000"/> |
| Send Job Report To: | <input type="text"/> |
| <small>Please enter multiple email id's separated by comma (,)</small> | |

Output Section

| | |
|--------------------------------------|-------------------------------------|
| Output Format: | <input type="text" value="MARC"/> |
| Maximum Number of Records in a File: | <input type="text" value="100000"/> |
| Output File Name: | <input type="text"/> |

Run Now Schedule

- **Output and Input Section for Export Records by File:** If in the profile **Bib Local Id From File** was chose as the filter criteria, you will be able to modify the Output section as noted above and you will upload the .txt file of local identifiers in the Input section. Click **Browse** to find the file on your local machine.

Important

In the Input section, only a .txt file is allowed. In the file, the local identifiers must be separated by a line break.

Batch Process Section

| | |
|--|--|
| Batch Process Name: | <input type="text"/> |
| Batch Process Profile Name: | NRS Bib export test <input type="button" value="Q"/> |
| Batch Process Type: | Batch Export |
| Batch Size: | 10000 |
| Send Job Report To: | <input type="text"/> |
| <small>Please enter multiple email id's separated by comma (,)</small> | |

Output Section

| | |
|--------------------------------------|---------------------------------------|
| Output Format: | Marc <input type="button" value="v"/> |
| Maximum Number of Records in a File: | 100000 |
| Output File Name: | <input type="text"/> |

Run Now Schedule

Input Section

| | |
|--------------|-----------------------------|
| Upload File: | Browse... No file selected. |
|--------------|-----------------------------|

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

Batch Process Section

| | |
|--|--|
| Batch Process Name: | <input type="text"/> |
| Batch Process Profile Name: | Test_Bib_Import <input type="button" value="Q"/> |
| Batch Process Type: | Bib Import |
| Batch Size: | 10000 |
| Send Job Report To: | <input type="text"/> |
| <small>Please enter multiple email id's separated by comma (,)</small> | |

Run Now Schedule

Input Section

| | |
|--------------|-----------------------------|
| Upload File: | Browse... No file selected. |
|--------------|-----------------------------|

7.



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

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

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

Note

For additional information on **Batch Process Job Details**, see [Batch Process Job Details](#)

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

Note

For additional information on **Batch Process Job Schedule**, see [Batch Process Job Schedule](#)

Scheduling a Batch Process

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


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


Schedule

Provide Cron Expression Schedule
Enter Cron Expression:

Note

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

- You may also choose the radio button **Schedule** to manually enter when the job should occur. You will have two options:
 - **One Time**: Enter the date or search for it from the calendar icon  and time for the job to begin.

Provide Cron Expression Schedule
 One Time Recurring
Date: 
Time:
Enter Time in 24HR Format

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

Provide Cron Expression Schedule

One Time Recurring

Schedule Type: Daily Weekly Monthly

Time:

Enter Time in 24HR Format

HH:MM

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

Provide Cron Expression Schedule

One Time Recurring

Schedule Type: Daily Weekly Monthly

Time:

Enter Time in 24HR Format

HH:MM

Select Days of Week

Week days

- Monday
 - Tuesday
 - Wednesday
 - Thursday
 - Friday
 - Saturday
 - Sunday
-

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

Provide Cron Expression Schedule

One Time Recurring

Schedule Type: Daily Weekly Monthly

Time:
Enter Time in 24HR Format

Select Day of Month

Day of every Month(s).

Once your schedule has been determined, click

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

Note

For more information about Batch Process Job Details, see the section [below](#).

Scheduling a full dump of the database then incremental exports

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

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

Note

To make a batch process profile, see [below](#).

2. Adjust the **batch size** as needed.
3. Select the **output format**.
4. Enter a file name in the **Output filename**.
5. Verify that the radio button **Run Now** is chosen.

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

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

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

Note

To make a batch process profile, see [below](#).

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

3. Select the **output format**.

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

5. Select the radio button **Schedule** and schedule the preferred time. The job will pick up changes that exist since the job's creation.

Note

For more information about scheduling a job, see the [Scheduling a Batch Process](#) section above.

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

Scheduling a full dump followed by daily incrementals

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

Business Rules

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

Batch Process Filter Criteria



Batch Process Filter Criteria Lo

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

Note

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

Batch Process Filter Criteria Lookup

Lookup Results: 1 message

| | |
|---------------------|----------------------|
| Field Id: | <input type="text"/> |
| Field Name: | <input type="text"/> |
| Field Display Name: | <input type="text"/> |
| Field Type: | <input type="text"/> |

8 items retrieved, displaying all items.

Show entries

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

Showing 1 to 8 of 8 entries

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

Batch Process Job Details

[Admin](#) > [Batch Processes](#) > [Batch Process Job Details](#) >

Batch Process Job Details

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

Batch Processes
Administrative Documents

Batch Process Job Details ?

| |
|---|
| Date Created From: <input style="width: 100px;" type="text"/> |
| Date Created To: <input style="width: 100px;" type="text"/> |

Batch Process Job Details

Show 10 entries

| Job Id | Job Name | Batch Process Id | Batch Process Type | Batch Process Profile Name | User Name | Total Records | Records Processed | %Completed | Start Time | End Time | Time Spent | Status | Directory Path | Actions |
|---------|----------|------------------|---------------------|-------------------------------|----------------|---------------|-------------------|------------|---------------------|---------------------|------------|-----------|---------------------------------|---------------------------------------|
| 0000095 | | 95 | Bib Import | ISBN overlay | ole-quickstart | 2 | 2 | 100.00% | 03/28/2015 11:47 AM | 03/28/2015 11:47 AM | 0:0:3 | COMPLETED | View Job Report | <input type="button" value="Remove"/> |
| 0000094 | | 94 | Bib Import | TRCCS | ole-quickstart | 2 | 2 | 100.00% | 03/27/2015 09:09 PM | 03/27/2015 09:09 PM | 0:0:2 | COMPLETED | View Job Report | <input type="button" value="Remove"/> |
| 0000093 | | 93 | Bib Import | TRCCS | ole-quickstart | 2 | 2 | 100.00% | 03/27/2015 09:05 PM | 03/27/2015 09:05 PM | 0:0:2 | COMPLETED | View Job Report | <input type="button" value="Remove"/> |
| 0000092 | | 92 | Bib Import | TRCCS | ole-quickstart | 0 | 0 | 0.0% | 03/27/2015 09:02 PM | 03/27/2015 09:02 PM | 0:0:2 | STOPPED | View Job Report | <input type="button" value="Remove"/> |
| 0000091 | | 91 | Bib Import | TRCCS | ole-quickstart | 2 | 2 | 100.00% | 03/27/2015 08:57 PM | 03/27/2015 08:57 PM | 0:0:2 | COMPLETED | View Job Report | <input type="button" value="Remove"/> |
| 0000090 | | 90 | Bib Import | TRCCS | ole-quickstart | 2 | 2 | 100.00% | 03/27/2015 08:54 PM | 03/27/2015 08:54 PM | 0:0:3 | COMPLETED | View Job Report | <input type="button" value="Remove"/> |
| 0000089 | | 89 | Order Record Import | Test Manual PO Close (Lehigh) | ole-quickstart | 1 | 1 | 100.00% | 03/27/2015 03:49 PM | 03/27/2015 03:49 PM | 0:0:4 | COMPLETED | View Job Report | <input type="button" value="Remove"/> |
| 0000088 | | 88 | Order Record Import | Test Manual PO Close (Lehigh) | ole-quickstart | 1 | 1 | 100.00% | 03/27/2015 03:44 PM | 03/27/2015 03:44 PM | 0:0:8 | COMPLETED | View Job Report | <input type="button" value="Remove"/> |
| 0000087 | | 87 | Order Record Import | Test Manual PO Close (Lehigh) | ole-quickstart | 2 | 2 | 100.00% | 03/27/2015 03:37 PM | 03/27/2015 03:37 PM | 0:0:9 | COMPLETED | View Job Report | <input type="button" value="Remove"/> |
| 0000086 | | 86 | Bib Import | Penn bib import test 1 | ole-quickstart | 4 | 4 | 100.00% | 03/26/2015 03:04 PM | 03/26/2015 03:04 PM | 0:0:3 | COMPLETED | View Job Report | <input type="button" value="Remove"/> |

Showing 1 to 10 of 95 entries

[Previous](#) [Next](#)

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

Below is an example of an batch export job report:

Job Report

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

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

File List

Show 10 entries

csv xml xls

| File/Folder Name | Size | Last Modified |
|-----------------------|-------|---------------------|
| 1-2014-06-23T1818.mrc | 500 B | 06/23/2014 14:18:21 |

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

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

Batch Process Profile

Admin > Batch Processes > Batch Process Profile >

Batch Process Profile Lookup

> Batch Process Profile

Note

Please click [here](#) for technical documentation.

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

Note

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

Document Layout

Batch Process Profile

Document Number: 4445 Document Status: INITIATED
Initiator Network Id: ole-quickstart Creation Timestamp: 01:44 PM 05/12/2014

* indicates required field

> Document Overview

| | | | |
|-------------------------------|----------------------|--------------|----------------------|
| * Description: | <input type="text"/> | Explanation: | <input type="text"/> |
| Organization Document Number: | <input type="text"/> | | |

> Main Section

| | | | |
|-----------------------|---|--------------|---|
| * Batch Profile Name: | <input type="text" value="Test_Patron_Import"/> | Description: | <input type="text" value="Test_Desc_Patron"/> |
| * Batch Process Type: | <input type="text" value="Patron Import"/> | | |

> Notes and Attachments (0)

> Ad Hoc Recipients

> Route Log

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

Main Section tab

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

▼ Main Section

| | |
|---|--|
| * Batch Profile Name: <input style="width: 80%;" type="text" value="Test_Patron_Import"/> | Description: <input style="width: 80%;" type="text" value="Test_Desc_Patron"/> |
| * Batch Process Type: <input style="width: 80%;" type="text" value="Patron Import"/> <input type="button" value="Q"/> | |

Main Section definition

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

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



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

Note

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

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

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

OLE supports two ways of importing order data:

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

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

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


Invoice import can likewise be done two ways:

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

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

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

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

Enter the constant and default values and click .

- Constant: The value entered in the profile will override the present value or add a value if one was not present in the incoming invoice file.
- Default: The value entered in the profile will be added to the created document if the value is not available in the incoming invoice file.

Note

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



▼ Main Section

| | | | |
|--------------------------|--|---------------------|----------------------|
| * Batch Profile Name: | <input type="text"/> | Description: | <input type="text"/> |
| * Batch Process Type: | Order Record Import <input type="text"/> | | |
| Requisitions For Titles: | One Requisition Per Title <input type="text"/> | | |
| Marc Only | <input type="checkbox"/> | Bib Import Profile: | <input type="text"/> |


▼ Constant and Default Values

| * Data Type | Select Field Name | Enter Field Name | Select Field Value | Field Value | Default/Constant | Actions |
|----------------------|----------------------|----------------------|----------------------|----------------------|---|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input checked="" type="radio"/> Constant <input type="radio"/> Default | <input type="button" value="Add"/> |

Constant and Default Values definition

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

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



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

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

1. Default Location

Note

The default location must come from only one subfield (for example: 980 \$x), it cannot be two (980 \$x\$y).

The default location in your MARC record must match the location exactly as it appears in the Requisition's location dropdown. If three levels are used at your institution and three levels appear on the Requisition, then all three levels must be in you MARC subfield. Additionally, location levels must be separated by slashes (\$xUC/DDDL/Law).

2. Item Type

Note

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

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

3. Cost Source

4. Method of PO Transmission

5. Building Code

6. Delivery Campus Code

7. Org Code

8. Chart Code

9. Funding Source

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

1. List Price
2. Vendor Number
3. Quantity
4. No Of Parts
5. Account Number
6. Object Code
7. Default Location
8. Item Type

Note

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

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

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

Item Description is required for EDIFACT or MARC files that will not have a matching PO line item. Currently in OLE without a linked PO, or including the Item Description, the batch process will fail with the reason "Error Message:null".

Note

There is a bug ticket for the Item Description and its error message. See [OLE-7057](#)

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

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

When running the batch process for order imports, the Bib Import Profile is executed first and then the Order Import Profile.

Items and E-Holdings can be created by the Bib Import Profile and by the Order Record Import via the Requisition's transition to a Purchase Order. In order to prevent OLE from creating both, a check has been

added to the Order Record Import Profile. If an e-holdings or item record is created or modified by the Bib Import Profile, a second e-holding/item will not be created during the Requisition's transition to a Purchase Order. This ensures that only one new e-holding/item is linked to the Purchase Order and Bibliographic Record.

Note

OLE cannot run an Order Import batch process with hundreds of items. Additionally, the more items links to each order, the more time the system will take to import the order.


In OLE 1.5, you will not be able to import multiple orders with multiple copies and locations.

EDI Invoice Import Match Points

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

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

Batch Delete: Match Point Tab

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

▼ Main Section

| | | | |
|-----------------------|-------------------|--------------|------------------|
| * Batch Profile Name: | Test_Batch_Delete | Description: | Test_Desc_delete |
| * Batch Process Type: | Batch Delete | | Q |

▼ Match Point

Note: If an incoming record matches with more than one existing record, the incoming record will be discarded.

Bib Match Points

| Bib Match Point | Actions |
|---|------------------------------------|
| <input type="text"/> | <input type="button" value="Add"/> |
| <small>For ex : 001 ,245 \$a, 245 # \$a, 245 04 \$a, 245 #4 \$a, 245 09 \$a</small> | |

Holding Match Points

| Match Point Field | Actions |
|----------------------|------------------------------------|
| <input type="text"/> | <input type="button" value="Add"/> |

Item Match Points

| Match Point Field | Actions |
|----------------------|------------------------------------|
| <input type="text"/> | <input type="button" value="Add"/> |

Eholding Match Points

| Match Point Field | Actions |
|----------------------|------------------------------------|
| <input type="text"/> | <input type="button" value="Add"/> |

Batch Export

OLE does not provide a public discovery layer. As a result, staff will need to export bibliographic and OLE Instance data to various existing discovery layers. The existing systems expect MARC21 bibliographic

records with 9xx local data fields containing a subset of information from OLE Instance records attached to the bibliographic records. OLE is able to suppress bibliographic or Instance data marked as staff only. OLE will also dump incremental updates with additions, modifications and deletions to bibliographic or Instance data as required by each library. OLE also allows the user to specify frequency of full and incremental exports. All of these actions can be set up in the profile and carried out through the **Batch Process** interface.

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

Note

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

▼ Main Section

| | | | |
|-----------------------|--|---------------|-------------------------------------|
| * Batch Profile Name: | <input type="text"/> | Description: | <input type="text"/> |
| * Batch Process Type: | <input type="text" value="Batch Export"/> <input type="button" value="Q"/> | | |
| Data To Export: | <input type="text" value="Bibliographic,Instance and EInstan"/> | Export Scope: | <input type="text" value="Filter"/> |

▼ Filter Criteria

Note : A filter field can be specified in one of two ways:

1. Selecting an option from the drop-down "Select Field Name".
2. Entering a MARC field like in the text box "Enter Field Name": e.g. 001, 245 \$a, 245 \$a\$b, 245 ## \$a, 245 04 \$a, 245 ## \$a\$b

| Select field Name | Enter Field Name | Field Value | Field Range From | Field Range To | Actions |
|----------------------|----------------------|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="Add"/> |

▼ Data Mapping

| Actions |
|------------------------------------|
| <input type="button" value="add"/> |


▼ Delete Field

| Field Name | First Indicator | Second Indicator | SubField | SubField Contains | Actions |
|----------------------|----------------------|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

▼ Rename Field

| Original Tag | Ind 1 | Ind 2 | Subfield | Subfield contains | Rename Tag | Ind 1 | Ind 2 | Subfield | Subfield contains | Actions |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

Filter Criteria Tab

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

▼ Filter Criteria

Note : A filter field can be specified in one of two ways:


1. Selecting an option from the drop-down "Select Field Name".
2. Entering a MARC field like in the text box "Enter Field Name": e.g. 001, 245 \$a, 245 \$a\$b, 245 ## \$a, 245 04 \$a, 245 ## \$a\$b

| Select field Name | Enter Field Name | Field Value | Field Range From | Field Range To | Actions |
|----------------------|----------------------|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="Add"/> |


Filter Criteria definition


| Title | Description |
|-------------------|--|
| Select Field Name | Select the field name from the drop down list. |

Batch Processes Administrative Documents












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

Data Mapping Tab

Click  to add data mapping options.

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

▼ **Data Mapping**


| | | | | | | | | | Actions |
|--|----------------------|----------------------|----------------------|-------------------------|--------------------------|-------------------------|-------------------------|----------|---|
| | | | | | | | | |  |
| | | | | | | | | |  |
| Data Mapping Option <small>Note : For Bibmarc datatype the field value can be like 001, 245 \$a, 245 \$a\$b, 245 ## \$a, 245 04 \$a, 245 ## \$a\$b</small> | | | | | | | | | |
| * Data Type | Source Field | Enter Source Field | Source field Value | * Destination Data Type | Destination Field | Enter Destination Field | Destination Field Value | Priority | Actions |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | 0 |  |
| Bibmarc | 981 \$3 | | | Item | Holdings Location Level3 | | | 0 |  |
| Bibmarc | 981 \$2 | | | Item | Holdings Location Level2 | | | 0 |  |
| Bibmarc | 981 \$1 | | | Item | Holdings Location Level1 | | | 0 |  |
| Bibmarc | 981 \$b | | | Item | Item Type | | | 0 |  |
| Bibmarc | 981 \$a | | | Item | Item Status | | | 0 |  |
| Bibmarc | 980 \$c | | | Holdings | Location Level3 | | | 0 |  |
| Bibmarc | 980 \$b | | | Holdings | Location Level2 | | | 0 |  |
| Bibmarc | 980 \$a | | | Holdings | Location Level1 | | | 0 |  |

Data Mapping definition


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

Batch Processes
Administrative Documents

Action

Click  to add the Delete Field value.


Delete Field Tab

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


▼ **Delete Field**

| Field Name | First Indicator | Second Indicator | SubField | SubField Contains | Actions |
|----------------------|----------------------|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

Delete Field definition

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

Rename Field Tab

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

▼ **Rename Field**

| Original Tag | Ind 1 | Ind 2 | Subfield | Subfield contains | Rename Tag | Ind 1 | Ind 2 | Subfield | Subfield contains | Actions |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

Rename Field definition

| Title | Description |
|-------------------|---|
| Original Tag | Enter the numeric MARC tag that you wish to rename. |
| Ind 1 | Enter the Indicator 1 that will be changed. |
| Ind 2 | Enter the Indicator 2 that will be changed. |
| Subfield | Enter the subfield that will be changed. |
| Subfield Contains | Enter the information that the subfield contains to be changed. |
| Rename Tag | Enter the replacing numeric MARC tag. |
| Ind 1 | Enter the replacing Indicator 1 value. |
| Ind 2 | Enter the replacing Indicator 2 value. |
| Subfield | Enter the replacing Subfield. |

Batch Processes Administrative Documents

| | |
|-------------------|---|
| Subfield Contains | Enter the replacing subfield content. |
| Action | <div style="display: inline-block; border: 1px solid #ccc; padding: 5px 10px; background-color: #f0f0f0; border-radius: 3px;">Add</div> Click Add to add the Rename Field value. |

Example

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

Here is an example:

Batch Process Profile ⓘ

| | |
|--------------------------------------|---|
| Document Number: 3561 | Document Status: INITIATED |
| Initiator Network Id: ole-quickstart | Creation Timestamp: 04:16 PM 06/23/2014 |

* indicates required field

Document Overview

| | |
|--|--|
| * Description: <input style="width: 90%;" type="text"/> | Explanation: <div style="border: 1px solid #ccc; height: 20px;"></div> |
| Organization Document Number: <input style="width: 80%;" type="text"/> | |

Main Section

| | |
|--|--|
| * Batch Profile Name: <input style="width: 95%;" type="text" value="Test_Bat_Export_BibInstance_Inr"/> | Description: <input style="width: 95%;" type="text" value="Test_Desc_Batch_BibInstance_Ir"/> |
| * Batch Process Type: <input style="width: 90%;" type="text" value="Batch Export"/> Q | |
| Data To Export: <input style="width: 90%;" type="text" value="Bibliographic and Instance Data"/> | Export Scope: <input style="width: 80%;" type="text" value="Incremental"/> |

Filter Criteria

Data Mapping

| * Data Type | Source Field | Enter Source Field | Source field Value | * Destination Data Type | Destination Field | Enter Destination Field | Destination Field Value | Priority | Actions |
|-------------|------------------|----------------------|----------------------|-------------------------|-------------------|-------------------------|-------------------------|----------|---------------------------------------|
| | | <input type="text"/> | <input type="text"/> | | | <input type="text"/> | <input type="text"/> | 0 | <input type="button" value="Add"/> |
| Holdings | Call Number Type | | | Bibmarc | 099St | | | 1 | <input type="button" value="Delete"/> |

Delete Field

| Field Name | First Indicator | Second Indicator | SubField | SubField Contains | Actions |
|----------------------|----------------------|----------------------|----------------------|--|---------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input style="width: 90%;" type="text"/> | <input type="button" value="add"/> |
| 500 | | | a | | <input type="button" value="Delete"/> |

Rename Field

| Original Tag | Ind 1 | Ind 2 | Subfield | Subfield contains | Rename Tag | Ind 1 | Ind 2 | Subfield | Subfield contains | Actions |
|----------------------|----------------------|----------------------|----------------------|--|----------------------|----------------------|----------------------|----------------------|--|---------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input style="width: 90%;" type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input style="width: 90%;" type="text"/> | <input type="button" value="add"/> |
| 250 | | | a | | 340 | | | b | | <input type="button" value="Delete"/> |

Notes and Attachments (0)

Ad Hoc Recipients

Route Log

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

Batch Export: Bib Local ID from File

Set up the Profile:

Batch Processes Administrative Documents

Document Overview

| | | | |
|-------------------------------|------------------|--------------|--|
| * Description: | export by filter | Explanation: | |
| Organization Document Number: | | | |

Main Section

| | | | |
|-----------------------|---------------------------------|---------------|--------|
| * Batch Profile Name: | export by filter | Description: | |
| * Batch Process Type: | Batch Export | | |
| Data To Export: | Bibliographic and Instance Data | Export Scope: | Filter |

Filter Criteria

Note : A filter field can be specified in one of two ways:


1. Selecting an option from the drop-down "Select Field Name".

2. Entering a MARC field like in the text box "Enter Field Name": e.g. 001, 245 \$a, 245 \$a\$b, 245 ## \$a, 245 04 \$a, 245 ## \$a\$b

| Select field Name | Enter Field Name | Field Value | Field Range From | Field Range To | Actions |
|------------------------|----------------------|----------------------|----------------------|----------------------|---------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="Add"/> |
| Bib Local Id From File | | | | | <input type="button" value="Delete"/> |

1. In the Document Overview: Enter a **Description**
2. In the Main Section: Enter a **Batch Profile Name**, search for the **Batch Process Type** "Batch Export", select a type of **Data to Export**, and select the **Export Scope** "Filter".
3. In the Filter Criteria: Select "Bib Local ID from File" under **Select Field Name**. Click **Add**.
4. Click **Submit**

From the Batch Process:

1. Select the **Batch Process Profile Name** from the Lookup .
2. In the Input Section: Click **Browse...** to search your computer for the .txt file

Important

This .txt file's local identifiers must be separated by a line break

3. Click **Submit**
4. When the **Batch Process Job Details** screen appears, refresh your screen to see the completed job. Click **View Job Report** to download the exported file.

Bib Import

For a demonstration of several Bib Imports in OLE 1.5.2.1, watch "Bib Import 101" available under [OLE Demonstration Library - OLE 1.5 Demos](#). The demonstration presents the setup of several different bib import profiles and the batch processing of .mrc files to import records using the created profiles into OLE. Additionally, to see the step by step functionality of the Bib Import profile, see the Google Document: [Spec - Batch Import](#)

Note

You will need to log into KIS to view this document.

If the **Bib Import** type is selected from the **Main Section**, additional tabs will load: **Match Point, Matching, Add and Overlay Section, Set Bib Status, Staff Only Treatment, Changes to Imported**

Bibliographic Record, Constant and Default Values (described above), **Data Mapping, Protected Field, Delete Field, and Rename Field**.

Note

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

In the **Main Section**, be sure to select the **Data to Import** that is relevant for your import files. If you select "Bibliographic, Instance and EInstance" but only import E-Instance records, you will end up with extraneous holdings and items. Additionally, the **Constant and Default Values** should match the data to import. If you create a profile and select "Bibliographic and EInstance Data", do not enter any constant or default values for Holdings and Items - only for E-Holdings.

Batch Process Profile


| | | | |
|-----------------------|----------------|---------------------|---------------------|
| Document Number: | 4171 | Document Status: | INITIATED |
| Initiator Network Id: | ole-quickstart | Creation Timestamp: | 09:30 AM 07/14/2014 |

* Indicates required field

Document Overview

| | | | |
|-------------------------------|----------------------|--------------|----------------------|
| * Description: | <input type="text"/> | Explanation: | <input type="text"/> |
| Organization Document Number: | <input type="text"/> | | |

Main Section

| | | | |
|-----------------------|---|--------------|--|
| * Batch Profile Name: | <input type="text" value="Test_Bib_Import"/> | Description: | <input type="text" value="Test_Desc_Bib"/> |
| * Batch Process Type: | <input type="text" value="Bib Import"/>  | | |
| Data To Import: | <input type="text" value="Bibliographic and Instance Data"/> | | |

- ▶ Match Point
- ▶ Matching, Add and Overlay Section
- ▶ Set Bib Status
- ▶ Staff Only Treatment
- ▶ Changes to Imported Bibliographic Record
- ▶ Constant and Default Values
- ▶ Data Mapping
- ▶ Protected Field
- ▶ Delete Field
- ▶ Rename Field
- ▶ Notes and Attachments (0)
- ▶ Ad Hoc Recipients
- ▶ Route Log

Match Point Tab

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

entered (First entered, first matched). Click  after adding each match point.

▼ Match Point

Note: If an incoming record matches with more than one existing record, the incoming record will be discarded.

Bib Match Points

| Bib Match Point | Actions |
|---|------------------------------------|
| <input type="text"/> | <input type="button" value="Add"/> |
| <small>For ex : 001 ,245 \$a, 245 # \$a, 245 04 \$a, 245 #4 \$a, 245 0# \$a</small> | |

Holding Match Points

| Match Point Field | Actions |
|----------------------|------------------------------------|
| <input type="text"/> | <input type="button" value="Add"/> |

Item Match Points

| Match Point Field | Actions |
|----------------------|------------------------------------|
| <input type="text"/> | <input type="button" value="Add"/> |

Eholding Match Points

| Match Point Field | Actions |
|----------------------|------------------------------------|
| <input type="text"/> | <input type="button" value="Add"/> |

Matching, Add and Overlay Section

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

Tip

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

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

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

Note

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

▼ Matching, Add and Overlay Section

Do not perform matching of incoming Bib with existing Bibs.

Add Incoming Bibs.

Perform matching of incoming Bib with existing Bibs.

If incoming Bib does not match with any existing Bibs

Discard Incoming Bib.

Add Incoming Bib.

If incoming Bib matches with existing Bib

Add Incoming Bib.

Process Bib, Holdings and Items.

Process Bib

Discard incoming Bib.

Overlay existing Bib with incoming Bib.

▼ Process Holdings and Items

Do not perform matching of Holdings.

Discard incoming Holdings and Items.

Delete all existing Holdings and Items, and add incoming H

Keep all existing Holdings and Items, and add incoming Ho

Perform matching of Holdings.

If an incoming Holdings does not match with any existing H

Discard incoming Holdings and its Items.

Add incoming Holdings and its Items.

If an incoming Holdings matches with any existing Holdings

Add incoming Holdings and its Items.

Process Holdings and Items

Process Holdings

Discard incoming Holdings.

Overlay existing Holdings with incoming Holding

Set Bib Status Tab

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

▼ **Set Bib Status**

| | | | |
|-------------------------------------|-------------|--------------------|--|
| For new records set Bib status as : | None | For Overlaid Bibs: | <input type="radio"/> Do not change Status |
| | | | <input checked="" type="radio"/> Set Status as |
| Change Status To: | Cataloguing | | |

Staff Only Treatment Tab

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

▼ **Staff Only Treatment**

| | | |
|--|---------------------------------|---|
| | For new Bib set Staff Only | <input type="checkbox"/> |
| | For new Instance set Staff Only | <input type="checkbox"/> |
| | For new Item set Staff Only | <input type="checkbox"/> |
| | For Overlaid Bibs: | <input type="radio"/> Do not change Staffonly |
| | | <input checked="" type="radio"/> Set Staffonly as |
| | For Overlaid Bib set Staff Only | <input type="checkbox"/> |

Changes to Imported Bibliographic Record Tab

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

▼ **Changes to Imported Bibliographic Record**

Delete 001

Tag 001: Change to 035

Remove from 001


Prepend contents of tag 003, enclosed in parentheses

Always prepend this value :

Constant and Default Values

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


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Enter the constant or default values and click .


▼ Constant and Default Values

| * Data Type | Select Field Name | Enter Field Name | Select Field Value | Enter Field Value | Default/Constant | Actions |
|----------------------|----------------------|----------------------|----------------------|----------------------|---|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input checked="" type="radio"/> Constant <input type="radio"/> Default | <input type="button" value="Add"/> |


Constant and Default Values definition

| | |
|-------------------|---|
| Title | Description |
| Data Type | Select the type of date (bib, holding or item) from the drop down list. |
| Select Field Name | If you selected holding or item from the Data Type , select the field name from the drop down list. |
| Enter Field Name | Enter the field name to be defined as the constant or default value. |
| Field Value | Enter the field value to be defined as the constant or default value. |
| Default/Constant | Select the radio button for default or constant. <ul style="list-style-type: none"> “Constant” data will be added to all records created or modified by the batch process. “Default” data will be added to records if there is nothing found on the incoming record. Data will be added unless other data is identified for that field in the Data Mapping section. |
| Action | Click  to add the Default or Constant value. |

Data Mapping Tab

Click  to add data mapping options.

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

the  button next to **Priority**.


▼ Data Mapping

| * Data Type | Source Field | Enter Source Field | Source field Value | * Destination Data Type | Destination Field | Enter Destination Field | Destination Field Value | Priority | Actions |
|----------------------|----------------------|----------------------|----------------------|-------------------------|--------------------------|-------------------------|-------------------------|----------|---------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | 0 | <input type="button" value="Add"/> |
| Bibmarc | 981 \$3 | | | Item | Holdings Location Level3 | | | 0 | <input type="button" value="Delete"/> |
| Bibmarc | 981 \$2 | | | Item | Holdings Location Level2 | | | 0 | <input type="button" value="Delete"/> |
| Bibmarc | 981 \$1 | | | Item | Holdings Location Level1 | | | 0 | <input type="button" value="Delete"/> |
| Bibmarc | 981 \$b | | | Item | Item Type | | | 0 | <input type="button" value="Delete"/> |
| Bibmarc | 981 \$a | | | Item | Item Status | | | 0 | <input type="button" value="Delete"/> |
| Bibmarc | 980 \$c | | | Holdings | Location Level3 | | | 0 | <input type="button" value="Delete"/> |
| Bibmarc | 980 \$b | | | Holdings | Location Level2 | | | 0 | <input type="button" value="Delete"/> |
| Bibmarc | 980 \$a | | | Holdings | Location Level1 | | | 0 | <input type="button" value="Delete"/> |

Data Mapping definition

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

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| | |
|-------------------------|---|
| Source Field | If you have chosen holding or item as the data type, select the OLE source field from the drop down menu. |
| Enter Source Field | If you have chosen bibmarc as the data type, enter a source field. For example "100 \$a" |
| Source Field Value | If you have chosen bibmarc as the data type, enter a source field value. |
| Destination Data Type | Select the type of destination data type (bibmarc, holding or item) from the drop down list. |
| Destination Field | <p>If you have chosen holding or item as the data type, select the destination field from the drop down menu.</p> <p>Note</p> <p>The Destination Field options do not appear until you have made a selection in the Destination Data Type Field.</p> <p>Tip</p> <p>If you choose a location level from the dropdown for Holdings or Items, be sure that your institution has a location assigned to that level.</p> |
| Enter Destination Field | If you have chosen bibmarc as the destination data type, enter a destination field. For example "100 \$a" |
| Destination Field Value | <p>If you have chosen bibmarc as the data type, enter a destination field value to overlay or add the value to the newly created record. Leave blank for the incoming record to populate the field.</p> <p>Note</p> <p>The values in this field are not applicable to holdings and item records. The batch process will ignore any data you enter in this field for these record types.</p> |
| Priority | <p>If the same incoming record could have the same information in multiple fields (for example call numbers), you may prioritize which should fill the OLE record first or second, and so on.</p> <p>Note</p> <p>You cannot map incoming data from multiple fields to a single field in OLE, unless you set priorities. In that case only the first met priority field will be mapped.</p> |
| Action | <p>Click  to add the Delete Field value.</p> |

Note

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


Protected Fields Tab

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

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

Note

For information on how to add and maintain [globally protected fields](#), see the section of the [Guide to the OLE Describe and Manage Module](#).

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

Note

Some fields may have multiple occurrences to be protected in both the incoming and the existing record (the 590, for example). In OLE 1.5, the protected fields listed in the **Profile Protected Fields** will be protected for the existing record but will ignore those in the incoming record. This is to be addressed in a later release, see [OLE-6848](#).

▼ Protected Field


▼ **Globally Protected Fields**

| Field Name | First Indicator | Second Indicator | Sub Field | Ignore GPF |
|------------|-----------------|------------------|-----------|--------------------------|
| 790 | | | | <input type="checkbox"/> |
| 791 | | | | <input type="checkbox"/> |
| 792 | | | | <input type="checkbox"/> |
| 793 | | | | <input type="checkbox"/> |

▼ **Profile Protected Fields**

| Field Name | First Indicator | Second Indicator | Sub Field | Sub Field Contains | Actions |
|----------------------|----------------------|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

Delete Field

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

▼ Delete Field


| Field Name | First Indicator | Second Indicator | SubField | SubField Contains | Actions |
|----------------------|----------------------|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

Delete Field definition


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

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Action

Click  to add the Delete Field value.


Rename Field

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

▼ Rename Field

| Original Tag | Ind 1 | Ind 2 | Subfield | Subfield contains | Rename Tag | Ind 1 | Ind 2 | Subfield | Subfield contains | Actions |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

Rename Field definition

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

Examples

Rename tag 546 to 500:

▼ Rename Field

| Original Tag | Ind 1 | Ind 2 | Subfield | Subfield contains | Rename Tag | Ind 1 | Ind 2 | Subfield | Subfield contains | Actions |
|--------------|----------------------|----------------------|----------------------|----------------------|------------|----------------------|----------------------|----------------------|----------------------|------------------------------------|
| 546 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | 500 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

Change 245 first indicator value from 0 to 1:

▼ Rename Field

| Original Tag | Ind 1 | Ind 2 | Subfield | Subfield contains | Rename Tag | Ind 1 | Ind 2 | Subfield | Subfield contains | Actions |
|--------------|-------|----------------------|----------------------|----------------------|------------|-------|----------------------|----------------------|----------------------|------------------------------------|
| 245 | 0 | <input type="text"/> | <input type="text"/> | <input type="text"/> | 245 | 1 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

Change 730 second indicator value from 2 to 0:

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▼ Rename Field

| Original Tag | Ind 1 | Ind 2 | Subfield | Subfield contains | Rename Tag | Ind 1 | Ind 2 | Subfield | Subfield contains | Actions |
|--------------|-------|-------|----------|-------------------|------------|-------|-------|----------|-------------------|---------|
| 730 | | 2 | | | 730 | | 0 | | | add |

Change 651 subfield x to 651 subfield v:

▼ Rename Field

| Original Tag | Ind 1 | Ind 2 | Subfield | Subfield contains | Rename Tag | Ind 1 | Ind 2 | Subfield | Subfield contains | Actions |
|--------------|-------|-------|----------|-------------------|------------|-------|-------|----------|-------------------|---------|
| 651 | | | x | | 651 | | | v | | add |

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

▼ Rename Field

| Original Tag | Ind 1 | Ind 2 | Subfield | Subfield contains | Rename Tag | Ind 1 | Ind 2 | Subfield | Subfield contains | Actions |
|--------------|-------|-------|----------|-------------------|------------|-------|-------|----------|-------------------|---------|
| 650 | | | z | Siam | 650 | | | z | Thailand | add |

Bib Import with multiple holdings and multiple items

To import multiple holdings and items with the Bib Import Profile, you will need to enter information for at least two different destination fields: A "Location Level5" for both the holdings, and a "Holdings Location Level5" for the item. (Depending on your institution, you may need to include additional location levels.) If you do not include these location level destination fields, the bib import profile will only create one holding and one item per bibliographic record. For Example:

▼ Data Mapping

| | | | | | | | | | | Actions |
|---|--------------|--------------------|--------------------|-------------------------|--------------------------|-------------------------|-------------------------|----------|---------|---------|
| | | | | | | | | | | add |
| | | | | | | | | | | Delete |
| Data Mapping Option | | | | | | | | | | |
| Note : For Bibmarc datatype the field value can be like 001, 245 \$a, 245 \$a\$b, 245 ## \$a, 245 04 \$a, 245 ## \$a\$b | | | | | | | | | | |
| * Data Type | Source Field | Enter Source Field | Source field Value | * Destination Data Type | Destination Field | Enter Destination Field | Destination Field Value | Priority | Actions | |
| | | | | | | | | 0 | Add | |
| Bibmarc | 852 \$h\$i | | | Holdings | Call Number | | | 0 | Delete | |
| Bibmarc | 852 \$c | | | Holdings | Location Level5 | | | 0 | Delete | |
| Bibmarc | 852 \$b | | | Holdings | Location Level3 | | | 0 | Delete | |
| Bibmarc | 876 \$3 | | | Item | Enumeration | | | 0 | Delete | |
| Bibmarc | 876 \$h\$i | | | Item | Call Number | | | 0 | Delete | |
| Bibmarc | 876 \$f | | | Item | Item Type | | | 0 | Delete | |
| Bibmarc | 876 \$p | | | Item | Item Barcode | | | 0 | Delete | |
| Bibmarc | 852 \$c | | | Item | Holdings Location Level5 | | | 0 | Delete | |
| Bibmarc | 852 \$b | | | Item | Holdings Location Level3 | | | 0 | Delete | |
| Bibmarc | 876 \$c | | | Item | Location Level5 | | | 0 | Delete | |
| Bibmarc | 876 \$b | | | Item | Location Level3 | | | 0 | Delete | |
| Bibmarc | 876 \$q | | | Item | Item Status | | | 0 | Delete | |
| Bibmarc | 876 \$w | | | Item | Call Number Type | | | 0 | Delete | |
| Bibmarc | 852 \$w | | | Holdings | Call Number Type | | | 0 | Delete | |

Warning

Leave the Destination Field Value blank. The created records will not include the values if you enter them in this field.

Batch Process Schedule

[Admin](#) > [Batch Processes](#) > [Batch Process Schedule](#) >

Batch Process Schedule

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

Batch Process Type

[Admin](#) > [Batch Processes](#) > [Batch Process Type](#) >

Batch Process Type Lookup

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

Note

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

Batch Process Type Lookup [?](#)

① Lookup Results: 1 message

| | |
|----------------------------|--|
| Batch Process Type Id: | <input type="text"/> |
| Batch Process Type Name: | <input type="text"/> |
| Batch Process Type Code: | <input type="text"/> |
| Batch Process Type Active: | <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both |

• 9 Items retrieved, displaying all items.

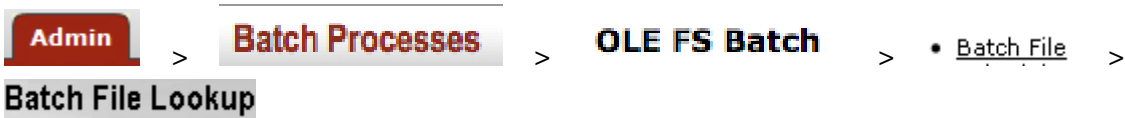
Show entries

| Batch Process Type Id | Batch Process Type Name | Batch Process Type Code | Active Indicator |
|-----------------------|-------------------------|-------------------------|------------------|
| 12 | Order Record Import | ord_rec | true |
| 13 | Invoice Import | inv_ing | true |
| 14 | Batch Delete | bat_del | true |
| 15 | Batch Export | bat_exp | true |
| 16 | Patron Import | pat_ing | true |
| 17 | Bib Import | imp_bib | true |
| 18 | Location Import | loc_ing | true |
| 19 | Claim Report | clm_rep | true |
| 20 | Serial Record Import | ser_imp | true |

Showing 1 to 9 of 9 entries

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

Batch File



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

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

kuali
open library environment

Provide Feedback

Main Menu Maintenance Administration Rice 2

OLE Financial System :: 1.0.0-M1-r12703 :: 2013-06-20 03:05 UTC (Oracle9i)

action list doc search Logged in User: ole-khuntley Login Logout

Batch File Lookup [?](#)

* required field

| | |
|--------------------------|---|
| File Path: | staging pdp paymentLoadSummary paymentImport bankFederalReserve paymentExtract sys batchContainer select vendortransmissionfiles bibInfo fp procurementCard purap electronicInvoice |
| File Name: | <input type="text"/> |
| Last Modified Date From: | <input type="text"/> |
| Last Modified Date To: | <input type="text"/> |

Batch File Lookup screen definition

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

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

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

Warning

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

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

Batch/Scheduled Jobs

[Admin](#) > [Batch Processes](#) > [OLE FS Batch](#) > [Batch/Scheduled Jobs](#)
Batch Job Lookup >
Batch Job

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

Batch Job Lookup

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

Tip

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

Batch Job Lookup ?

| | |
|---|--|
| Job Trigger Name: | <input type="text"/> |
| Enable Job: | <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both |
| <input type="button" value="Search"/> <input type="button" value="Clear Values"/> <input type="button" value="Cancel"/> | |

Document Layout

Batch Job

| | | | |
|-----------------------|----------------|---------------------|---------------------|
| Document Number: | 4897 | Document Status: | INITIATED |
| Initiator Network Id: | ole-quickstart | Creation Timestamp: | 12:27 PM 02/04/2015 |

* indicates required field

Document Overview

| | | | |
|-------------------------------|----------------------|--------------|----------------------|
| * Description: | <input type="text"/> | Explanation: | <input type="text"/> |
| Organization Document Number: | <input type="text"/> | | |

Add/Edit Batch Job

| | Old | New |
|------------------------|---------------------|-------------------------------------|
| * Job Trigger Name: | generateNoticesJob | generateNoticesJob |
| * Job Cron Expression: | 0 24 05 31 1 ? 2015 | 0 24 05 31 1 ? 2015 |
| Enable Job: | true | <input checked="" type="checkbox"/> |

Run/Schedule Batch Job

Run Now Schedule

Notes and Attachments (0)

Ad Hoc Recipients

Route Log

This screen includes unique **Add/Edit Batch Job** and **Run/Schedule Batch Job** tabs in addition to the standard tabs that display on OLE document screens.

Note

For more information about the standard tabs, see [Standard Tabs](#) on the [Guide to OLE Basic Functionality and Key Concepts](#).

Add/Edit Batch Job

Add/Edit Batch Job

| | Old | New |
|------------------------|---------------------|-------------------------------------|
| * Job Trigger Name: | generateNoticesJob | generateNoticesJob |
| * Job Cron Expression: | 0 24 05 31 1 ? 2015 | 0 24 05 31 1 ? 2015 |
| Enable Job: | true | <input checked="" type="checkbox"/> |

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

Add/Edit Batch Job definition

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

Run/Schedule Batch Job

Run/Schedule Batch Job

Run Now Schedule

The Batch Job document includes the **Run/Schedule Batch Job** tab.

Click **Run Now** and **Submit** to start the job. Click **Schedule** to choose a date and time to start the job. Choosing **Schedule** opens a new tab:

Run/Schedule Batch Job

Run Now Schedule

Schedule

Provide Cron Expression Schedule

You have two options to schedule your batch job.

- Click **Provide Cron Expression** and enter the Cron Expression. See [Job CRON Expression - controlling the frequency/schedule of job execution](#) below for assistance entering the Expression

Run/Schedule Batch Job

Run Now Schedule

Schedule

Provide Cron Expression Schedule

* Enter Cron Expression:

- Click **Schedule** to enter a specified date or recurring dates for the batch job to run.

Run/Schedule Batch Job


Run Now Schedule

Schedule

Provide Cron Expression Schedule


One Time Recurring

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

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

Provide Cron Expression Schedule

One Time Recurring

Date: 

Time:
Enter Time in 24HR Format

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

Provide Cron Expression Schedule

One Time Recurring

Schedule Type: Daily Weekly Monthly

Time:
Enter Time in 24HR Format

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

Provide Cron Expression Schedule

One Time Recurring

Schedule Type: Daily Weekly Monthly

Time:

Enter Time in 24HR Format

HH:MM

Select Days of Week

Week days

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

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

Provide Cron Expression Schedule

One Time Recurring

Schedule Type: Daily Weekly Monthly

Time:
Enter Time in 24HR Format

Select Day of Month

Day of every Month(s).

Once your schedule has been determined, click

Pick up Location (for On Hold Notices)

If you have selected the **generateOnHoldNoticeJob**, an additional tab will be available. **Pick up Location** allows you to regulate the printing or electronic transmission of Deliver notices by Circulation Location/Library Name if desired.

▼ **Pick up Location**

| | Old | New |
|-------------------|-----|----------------------|
| Pick-up Location: | | <input type="text"/> |

Select the Pick-up Location from the drop down list. The list will only include locations for which you are authorized.

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

Note

OLE uses the [Quartz Job Scheduler](#) as its authority on Cron expressions.

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

Example:

Batch Processes
Administrative Documents

0 15 10 * * ?

0/2 0 12 * * ?

CRON Field definition

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

Special Character definition

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

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

Batch Semaphore File Upload

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

Batch Error Semaphore File Upload

Tip

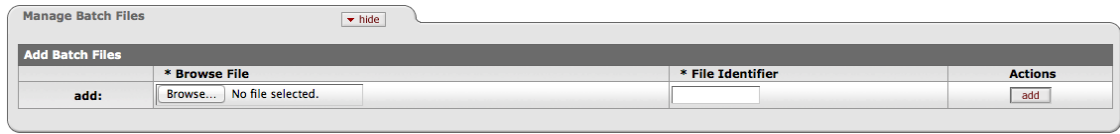
Because this functionality was inherited from KFS, additional information can be found in their technical documentation located on the wiki pages [Batch 5](#) and [Batch Container 5](#).

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

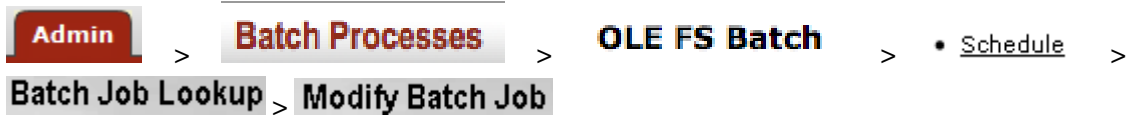
Note

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

Batch Error Semaphore File Upload 



Schedule



Note

Please click [here](#) for technical documentation.

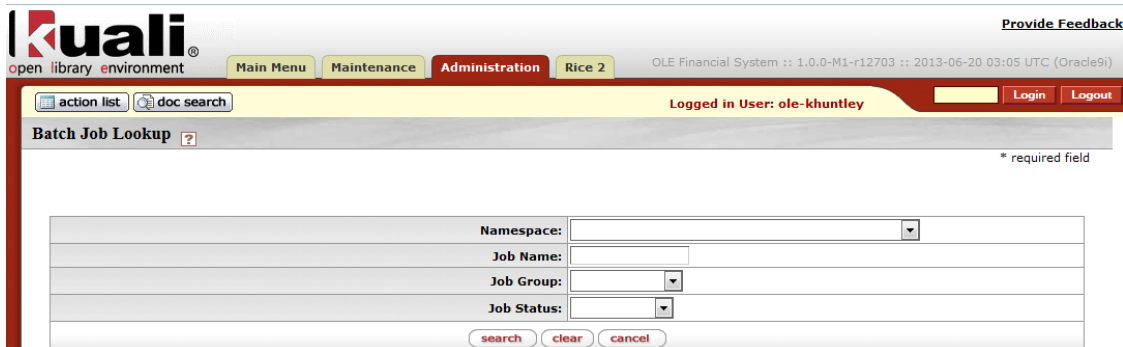
The Schedule option allows users to view, schedule or execute OLE batch processes (commonly called 'jobs' or 'batch jobs'). Scheduling is very necessary for OLE as there are many jobs - some running nightly, hourly, and others that only run after another job has successfully run.

Tip

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

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

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



Batch Job Lookup screen definition

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

Batch Processes
Administrative Documents

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

The screen returns the applicable list of jobs:

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

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

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

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

Note

For information about how to run a job, see the [Running Section](#) below.

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

There is a parameter, OLE-SYS CUTOFF_TIME, which controls when the daily batch schedule should terminate. If schedulejob does not complete and some of the dependent jobs are stuck at "Pending", a cut-off time check, which prevents the job from overrunning, is causing the error. Adjust the time on the parameter to correct the problem.

Note

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

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

Document Layout

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

Batch Processes
Administrative Documents

Modify Batch Job [Return to Lookup](#)

Job Info ▼ hide

| Job Info | | Running | | Other Commands |
|-------------|--|------------|--|---|
| Job Name: | purchasingPreDisbursementExtractJob | Job Group: | unscheduled | <input type="button" value="unschedule"/> |
| Job Status: | Batch File lookup (to retrieve logs and reports) | | Start Step: <input type="text" value="1"/> End Step: <input type="text" value="2"/> Start Date/Time: <input type="text" value=""/> Results Email Address: <input type="text" value="mail to me"/> <input type="button" value="run"/> | |

Steps ▼ hide

| # | Name |
|---|--|
| 1 | purchasingPreDisbursementImmediatesExtractStep |
| 2 | purchasingPreDisbursementExtractStep |

Dependencies ▼ hide

autoApprovePaymentRequestsJob (softDependency)

Note

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

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

Job Info Tab

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

Job Info Section

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

Batch File Lookup ?

| | |
|--|--|
| <p>File Path:</p> | <div style="border: 1px solid gray; padding: 2px;"> <ul style="list-style-type: none"> staging pdp <ul style="list-style-type: none"> paymentLoadSummary paymentImport bankFederalReserve paymentExtract sys <ul style="list-style-type: none"> batchContainer select vendortransmissionfiles bibInfo fp <ul style="list-style-type: none"> procurementCard purap electronicInvoice </div> |
| File Name: <input type="text"/> | <input type="text"/> |
| Last Modified Date From: <input type="text"/> | <input type="text"/> |
| Last Modified Date To: <input type="text"/> | <input type="text"/> |
| <input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/> | |

Note

To learn more about the Batch File Lookup screen, see [Batch File](#)

Running Section

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

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

Note

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

Warning

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

Running

Start Step:

End Step:

Start Date/Time: 

Results Email Address:

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

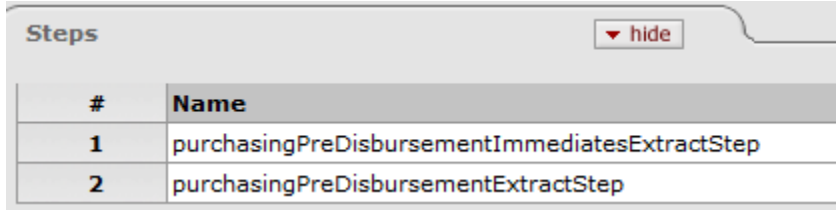
Other Commands Section

You may issue the following commands from this section:

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

Steps Tab

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

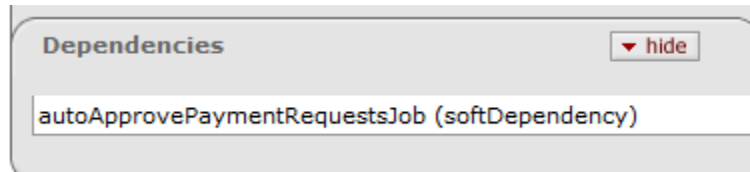


| # | Name |
|---|--|
| 1 | purchasingPreDisbursementImmediatesExtractStep |
| 2 | purchasingPreDisbursementExtractStep |

Dependencies Tab

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

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



| |
|--|
| autoApprovePaymentRequestsJob (softDependency) |
|--|

Tentative List of Select and Acquire jobs to be scheduled

Note

This list is a work in progress. For a working list of all Batch Jobs and additional information about them, see https://docs.google.com/a/kuali.org/spreadsheet/ccc?key=0AuCs4Q8X_DXJdHhqeIc1Skwya2JpckpfYzY4bHVnQ2c. You will need a KIS account to access this document.

accountTemporaryRestrictedNotifyJob
approveLineItemReceivingJob
autoApprovePaymentRequestsJob
autoClosePurchaseOrdersJob
autoCloseRecurringOrdersJob
autoDisapproveJob
clearPendingEntriesJob
closeJob
collectorJob
disbursementVoucherPreDisbursementProcessorExtractJob
electronicInvoiceExtractJob

enterpriseFeedJob
faxPendingDocumentJob
nightlyOutJob
nominalActivityClosingJob
pdpClearPendingTransactionsJob
pdpDailyReportJob
pdpExtractAchPaymentsJob
pdpExtractCanceledChecksJob
pdpExtractGITransactionsStepJob
pdpInactivatePayeeAchAccountsJob
pdpLoadFederalReserveBankDataJob
pdpLoadPaymentsJob
pdpNightlyLoadPaymentsJob
pdpSendAchAdviceNotificationsJob
populatePriorYearDataJob
posterBalancingJob posterJob
processPdpCancelsAndPaidJob
procurementCardDocumentJob
purchasingPreDisbursementExtractJob
purgeJob
purgeReportsAndStagingJob
receivingPaymentRequestJob
scheduleJob
scrubberJob
sufficientFundsAccountUpdateJob

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

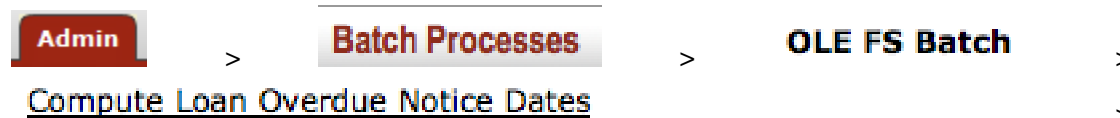
enterpriseFeedJob
nightlyOutJob

collectorJob
sufficientFundsAccountUpdateJob
scrubberJob
pdpClearPendingTransactionsJob
posterJob
posterBalancingJob
clearPendingEntriesJob
processPdpCancelsAndPaidJob
purchasingPreDisbursementExtractJob
disbursementVoucherPreDisbursementProcessorExtractJob
pdpNightlyLoadPaymentsJob

Special Batch File Upload



Compute Courtesy and Overdue Notice Dates for Loans



Compute courtesy and overdue

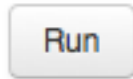
The Compute Courtesy and Overdue Notice Dates for Loans screen allows users to update the notice table for existing loan records. During implementation, the loan table (OLE_DLVR_LOAN_T) and the notice table (OLE_DLVR_LOAN_NOTICE_T) could be populated while loading institutional data. However, if your institution has not done so or if you need to repopulate the notice table, you may do it through this interface.

Note

The Courtesy and Overdue notices are dependent on your KRMS circulation policies. The notice table relies on the loan periods that are described in the policies.

Click **run** to trigger OLE's scan of loan documents in the loan table and update the notice table.

Compute courtesy and overdue



You will not receive any feedback from the interface that the tables are getting updated. To see changes, check your [Deliver Notices](#) after some time (it could take an hour or two).

Note

Deliver Notices documentation is available in the [Guide to the OLE Deliver Module](#).

Chapter 2. Monitoring Administrative Documents

Service Bus

- [Cache Admin](#)
- [Configuration Viewer](#)
- [Java Melody](#)
- [Message Queue](#)
- [Quartz](#)
- [Security Management](#)
- [Service Registry](#)
- [Thread Pool](#)

Workflow

- [Document Operation](#)
- [Statistics Report](#)



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


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

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

Cache Management



Cache Management

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

Tip

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

Document Layout

Cache Management

Check the boxes for the caches to flush:

| | |
|--------------------------|------------------------------------|
| <input type="checkbox"/> | coreServiceDistributedCacheManager |
| <input type="checkbox"/> | kewDistributedCacheManager |
| <input type="checkbox"/> | kimDistributedCacheManager |
| <input type="checkbox"/> | locationDistributedCacheManager |
| <input type="checkbox"/> | ole.core.DistributedCacheManager |

Configuration Viewer

Admin > **Monitoring** > **Service Bus** > **Configuration Viewer** >

Configured Properties:

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


Document Layout

workflow Refresh Page

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

Java Melody

Admin > **Monitoring** > **Service Bus** > **Java Melody** >

 **Statistics of JavaMelody monitoring taken at 3/11/14 10:4**

Message Queue



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

workflow Refresh Page

Current Node Info
IP Address: 10.147.198.103
Application ID: OLE
message.persistance: true
message.delivery: async
message.off: false

Message ID:
Service Name:
Application ID:
IP Number:
Queue Status:
App Specific Value 1:
App Specific Value 2:

Documents currently in route queue: 3
3 items retrieved, displaying all items.

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

Message

Message Queue Id: 10500
Status: E
Date: 03:20 PM 09/22/2009
Expiration Date:
Priority: 3
Retry Count: 3
IP Number: 129.79.216.129
Service Name: OSCacheNotificationService
Service Namespace: KFS
Method Name: invoke
App Specific Value 1:
App Specific Value 2:

Payload

Payload Class: class org.kuali.rice.ksb.messaging.AsynchronousCall
Method Name: invoke
ignoreStoreAndForward: false
ServiceInfo.messageEntryId: 5457
ServiceInfo.serviceNamespace: RICE
ServiceInfo.serverIp: 10.64.87.165
ServiceInfo.ServiceName: OSCacheNotificationService
ServiceInfo.endpointUrl: http://localhost:8080/kr-dev/remoting/OSCacheNotificationService
ServiceInfo.queue: false
ServiceInfo.alive: true
ServiceInfo.priority: 3
ServiceInfo.retryAttempts: 3
ServiceInfo.millisToLive: -1
ServiceInfo.messageExceptionHandler: org.kuali.rice.ksb.messaging.exceptionhandling.DefaultMessageExceptionHandler
ServiceInfo.service.class:
ServiceInfo.busSecurity: true
ServiceInfo.credentialsType:
Arguments: [java.io.Serializable] type=2, data=SystemParameterProxy

Quartz



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

Security Management



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

workflow Refresh Page

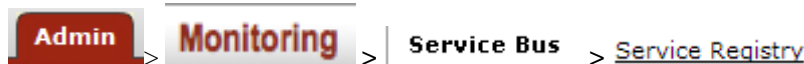
Create new Client Keystore file:

| | |
|---|--------------------------|
| Desired Alias (must be unique from list below): | <input type="text"/> |
| Password (will be used for keys as well as keystore): | <input type="password"/> |
| Re-Enter Password: | <input type="password"/> |
| <input type="button" value="create"/> <input type="button" value="clear fields"/> | |

Existing Keystore Entries:
One item retrieved.

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

Service Registry



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

workflow Refresh Page

Current Node Info

| |
|---------------------------------|
| Application ID: OLE |
| IP Address: 10.154.185.108 |
| Instance ID: OLE-10.154.185.108 |
| dev.mode: false |

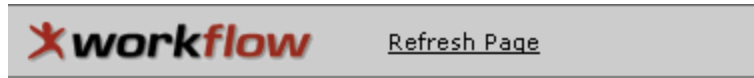
Published Services:

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

Thread Pool



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



Core Pool Size:
Maximum Pool Size:
Pool Size: 20
Active Count: 0
Largest Pool Size: 20
Keep Alive Time: 60000
Task Count: 1713
Completed Task Count: 1713
RouteQueue.TimeIncrement:
RouteQueue.maxRetryAttempts:
 Execute Across All Servers with Service Namespace KFS

Document Operation



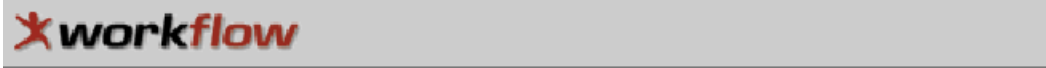
The **Document Operation** screen allows for low-level modifications to document data; users can manually move a particular document to the next step in the workflow, refresh the document, etc.

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

Tip

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

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



Operate on a document

| | |
|--|-------------------------------------|
| *Document ID: | <input type="text" value="317123"/> |
| <input type="button" value="get document"/> <input type="button" value="clear"/> | |

Enter the document ID you are searching for and click .

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

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

Document Action

| Document Actions | |
|--|---------------------------------------|
| Flush Rule Cache <input type="button" value="submit"/> | |
| Queue Document <input type="button" value="submit"/> | |
| Index Searchable Attributes <input type="button" value="submit"/> | |
| Queue Document Requirer <input type="button" value="submit"/> | |
| Queue Document Blanket Approve <input type="button" value="submit"/> | User: <input type="text"/> |
| Queue Document Move <input type="button" value="submit"/> | Action Taken Id: <input type="text"/> |
| | Node Names: <input type="text"/> |
| Queue Action Invocation <input type="button" value="submit"/> | User: <input type="text"/> |
| | Action Item Id: <input type="text"/> |
| | Action Code: <input type="text"/> |

Monitoring
Administrative Documents

Document Action definitions

| Title | Description |
|--------------------------------|--|
| Queue Document | Requeuing and reprocessing the document by the engine |
| Index Searchable Attributes | Update searchable data of the document |
| Queue Document Requeuer | Refresh document and regenerate request of current node |
| Queue Document Blanket Approve | <p>Move blanket approve document forward; User, Action Taken Id, and Node Names are required</p> <ul style="list-style-type: none"> • User - Enter initiator's network Id • Action Taken Id - Enter an entry's action taken Id • Node Names - Enter a comma separated list of node names |
| Queue Action Invocation | <p>Reassign action request based on initiator, entry ID, and action code; User, Action Item Id, and Action Code are required</p> <ul style="list-style-type: none"> • User - Enter initiator's network Id • Action Item Id - Enter an entry's action item Id • Action Code - A, F, K, or C; A for Approve, F for FYI, K for acknowledge, and C for Complete |

Document

| Document | |
|---------------------------------|---|
| Document ID: 331500 | <input type="radio"/> Update <input checked="" type="radio"/> No Operation |
| * Document Version: | 1 |
| * Initiator ID: | 1617103986 |
| * Initial Route Node Instances: | 563377067 |
| * Route Status: | ENROUTE |
| * Route Level: | 1 |
| * Create Date: | 03/10/2009 |
| * Doc Status Modification Date: | 03/10/2009 |
| Approved Date: | |
| Finalized Date: | |
| Route Status Modification Date: | |
| Route Level Modification Date: | |
| Doc Type ID: | 320834 |
| Doc Title: | Distribution Of Income |
| Application Doc ID: | |
| Doc Content: | <documentContent><applicationContent><org.kuali.rice.kns.workflow.KualiDocumentXmlMaterializer/></applicationContent></documentContent> |

Document definitions

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

Monitoring Administrative Documents

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

Action Requests

| Action Requests | |
|--------------------------------|---|
| Action Request ID: 3013 | <input type="radio"/> Update <input type="radio"/> Delete <input checked="" type="radio"/> No Operation |
| * Document Version: | 1 |
| * Document ID: | 3646 |
| * Route Node Instance ID: | 7910 |
| * Action Requested: | COMPLETE |
| * Create Date: | 09/23/2009 |
| * Status: | ACTIVE |
| * Priority: | 0 |
| * Route Level: | 0 |
| * Responsibility ID: | -3 |
| Responsibility Description: | Initiator needs to comp |
| Action Request Parent ID: | |
| Recipient Type: | person |
| Person ID: | 3420506415 |
| Workgroup ID: | |
| Role Name: | |
| Qualified Role Name: | |
| Qualified Role Label: | |
| Action Taken ID: | |
| Force Action: | Yes |
| Approve Policy: | F |
| Delegation Type: | |
| Current Indicator: | Yes |
| Annotation: | |






Action Request definitions

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

Monitoring Administrative Documents

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

Actions Taken

| Actions Taken | |
|-------------------------------|--|
| Action Taken ID: 12742 | <input type="radio"/> Update <input type="radio"/> Delete <input checked="" type="radio"/> No Operation |
| * Document ID: | <input type="text" value="331494"/> |
| * Document Version: | <input type="text" value="1"/> |
| * Action Taken: | BLANKET APPROVED  |
| * Action Date: | <input type="text" value="03/10/2009"/>  |
| * Action Taken Person ID: | <input type="text" value="6162502038"/>  |
| Delegator Person ID: | <input type="text"/>  |
| Delegator Workgroup ID: | <input type="text"/>  |
| Current Indicator: | <input type="text" value="Yes"/> |
| Annotation: | <input type="text"/> |

Actions Taken definitions









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

Monitoring Administrative Documents

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

Action Items

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

| Action Items | |
|------------------------------|--|
| Action Item ID: 10775 | <input type="radio"/> Update <input type="radio"/> Delete <input checked="" type="radio"/> No Operation |
| * Document ID: | 3646 |
| * Doc Type Name: | PREQ  |
| * Doc Type Label: | Payment Request |
| * Doc Handler URL: | https://test.kuali.org/k/ |
| * Date Assigned: | 09/23/2009  |
| * Action Request ID: | 3013 |
| * Action Requested: | COMPLETE  |
| * Responsibility ID: | -3 |
| * Person ID: | 3420506415  |
| Workgroup ID: | <input type="text"/>  |
| Role Name: | <input type="text"/>  |
| Delegator Person ID: | <input type="text"/>  |
| Delegator Workgroup ID: | <input type="text"/>  |
| Document Title: | Payment Request - PO |

Actions Items definitions

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

Route Node Instances

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

| Route Node Instances | |
|--|---|
| Route Node Instance ID: 563358013 | <input type="radio"/> Update <input type="radio"/> Delete <input checked="" type="radio"/> No Operation |
| Instance Name: | Adhoc Routing |
| Active Indicator: | <input type="text" value="true"/> |
| Complete Indicator: | <input type="text" value="false"/> |
| Initial Indicator: | <input type="text" value="false"/> |
| Previous Route Node Instances: | None |
| Next Route Node Instances: | None |
| Route Node States: | None |

Route Node Instances definitions

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

Branch States

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

| Branch States | |
|-----------------------------|---|
| Branch ID: 563377051 | <input type="radio"/> Update <input checked="" type="radio"/> No Operation |
| Branch Name: | <input type="text" value="PRIMARY"/> |
| Branch State ID: 563377053 | Key: <input type="text" value="System.PostProcessorF"/> <input type="button" value="delete 563377053"/> Value: <input type="text" value="true"/> |
| Branch State ID: 563377054 | Key: <input type="text" value="System.PostProcessorF"/> <input type="button" value="delete 563377054"/> Value: <input type="text" value="true"/> |

Branch States definitions

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

Annotation

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

| Annotation for Admin Change | |
|-----------------------------|----------------------|
| Annotation: | <input type="text"/> |

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

Statistics Report



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

Monitoring Administrative Documents

Workflow Statistics

| Aggregates | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|--|--------|---|-------------|---|----------------------------------|---|--------|---|----------|---|----------|---|----------|---|----------|---|--------|---|----------|---|----------|----|----------|---|----------|---|----------|----|--------|-----|----------|---|------------------------------|---|--------|---|----------|---|----------|---|------------------------------|---|----------|----|--------|---|------------|---|----------|---|----------|---|----------|---|----------|---|----------|---|---------|---|--------|---|----------|---|------------------|----|--------|---|---------------|---|---------------|---|---------|---|--------|---|----------|---|----------|---|----------------------------|---|----------|---|-----------|---|---------------------------------|---|----------|----|----------|-----|--------|---|----------------------|----|----------|---|----------|---|-------------|---|------------------------------|---|----------|---|---------------------------|---|---------|---|
| Number of Document Types: | 319 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Number of Users: | 11 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Number of Active Items In All Action Lists: | 269 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Number of Documents Initiated in the Last 30 Days: | <table border="1" style="width: 100%; border-collapse: collapse;"> <tbody> <tr><td>OLE_DI</td><td style="text-align: right;">2</td></tr> <tr><td>OLE_REQTYPE</td><td style="text-align: right;">1</td></tr> <tr><td>ParameterTypeMaintenanceDocument</td><td style="text-align: right;">2</td></tr> <tr><td>OLE_PE</td><td style="text-align: right;">3</td></tr> <tr><td>OLE_ROOM</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_MOTD</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_SRYP</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_RPTC</td><td style="text-align: right;">2</td></tr> <tr><td>OLE_TF</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_PMBA</td><td style="text-align: right;">2</td></tr> <tr><td>OLE_PREQ</td><td style="text-align: right;">32</td></tr> <tr><td>OLE_OBJC</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_GSOB</td><td style="text-align: right;">2</td></tr> <tr><td>OLE_RCVL</td><td style="text-align: right;">27</td></tr> <tr><td>OLE_PO</td><td style="text-align: right;">402</td></tr> <tr><td>OLE_PMSN</td><td style="text-align: right;">1</td></tr> <tr><td>ParameterMaintenanceDocument</td><td style="text-align: right;">2</td></tr> <tr><td>OLE_DV</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_PMVC</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_SACC</td><td style="text-align: right;">2</td></tr> <tr><td>NamespaceMaintenanceDocument</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_ACQS</td><td style="text-align: right;">12</td></tr> <tr><td>OLE_IB</td><td style="text-align: right;">2</td></tr> <tr><td>OLE_PMALST</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_SOPT</td><td style="text-align: right;">5</td></tr> <tr><td>OLE_ACCT</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_PMVT</td><td style="text-align: right;">2</td></tr> <tr><td>OLE_PMCA</td><td style="text-align: right;">2</td></tr> <tr><td>OLE_PMPT</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_FFD</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_BA</td><td style="text-align: right;">3</td></tr> <tr><td>OLE_PMST</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_ACQBTHUPLOAD</td><td style="text-align: right;">22</td></tr> <tr><td>OLE_CM</td><td style="text-align: right;">3</td></tr> <tr><td>OLE_INVCSBTYP</td><td style="text-align: right;">7</td></tr> <tr><td>OLE_PYMNTMTHD</td><td style="text-align: right;">2</td></tr> <tr><td>OLE_FLU</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_AV</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_PMCP</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_GACC</td><td style="text-align: right;">1</td></tr> <tr><td>CountryMaintenanceDocument</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_APRD</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_ORDQU</td><td style="text-align: right;">5</td></tr> <tr><td>IdentityManagementGroupDocument</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_PVEN</td><td style="text-align: right;">12</td></tr> <tr><td>OLE_REQS</td><td style="text-align: right;">352</td></tr> <tr><td>OLE_CR</td><td style="text-align: right;">4</td></tr> <tr><td>DocumentTypeDocument</td><td style="text-align: right;">78</td></tr> <tr><td>OLE_OSTY</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_CSPR</td><td style="text-align: right;">2</td></tr> <tr><td>OLE_INVCTYP</td><td style="text-align: right;">1</td></tr> <tr><td>ComponentMaintenanceDocument</td><td style="text-align: right;">2</td></tr> <tr><td>OLE_CCTY</td><td style="text-align: right;">1</td></tr> <tr><td>CountyMaintenanceDocument</td><td style="text-align: right;">1</td></tr> <tr><td>OLE_CCR</td><td style="text-align: right;">1</td></tr> </tbody> </table> | OLE_DI | 2 | OLE_REQTYPE | 1 | ParameterTypeMaintenanceDocument | 2 | OLE_PE | 3 | OLE_ROOM | 1 | OLE_MOTD | 1 | OLE_SRYP | 1 | OLE_RPTC | 2 | OLE_TF | 1 | OLE_PMBA | 2 | OLE_PREQ | 32 | OLE_OBJC | 1 | OLE_GSOB | 2 | OLE_RCVL | 27 | OLE_PO | 402 | OLE_PMSN | 1 | ParameterMaintenanceDocument | 2 | OLE_DV | 1 | OLE_PMVC | 1 | OLE_SACC | 2 | NamespaceMaintenanceDocument | 1 | OLE_ACQS | 12 | OLE_IB | 2 | OLE_PMALST | 1 | OLE_SOPT | 5 | OLE_ACCT | 1 | OLE_PMVT | 2 | OLE_PMCA | 2 | OLE_PMPT | 1 | OLE_FFD | 1 | OLE_BA | 3 | OLE_PMST | 1 | OLE_ACQBTHUPLOAD | 22 | OLE_CM | 3 | OLE_INVCSBTYP | 7 | OLE_PYMNTMTHD | 2 | OLE_FLU | 1 | OLE_AV | 1 | OLE_PMCP | 1 | OLE_GACC | 1 | CountryMaintenanceDocument | 1 | OLE_APRD | 1 | OLE_ORDQU | 5 | IdentityManagementGroupDocument | 1 | OLE_PVEN | 12 | OLE_REQS | 352 | OLE_CR | 4 | DocumentTypeDocument | 78 | OLE_OSTY | 1 | OLE_CSPR | 2 | OLE_INVCTYP | 1 | ComponentMaintenanceDocument | 2 | OLE_CCTY | 1 | CountyMaintenanceDocument | 1 | OLE_CCR | 1 |
| OLE_DI | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_REQTYPE | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ParameterTypeMaintenanceDocument | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_PE | 3 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_ROOM | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_MOTD | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_SRYP | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_RPTC | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_TF | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_PMBA | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_PREQ | 32 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_OBJC | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_GSOB | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_RCVL | 27 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_PO | 402 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_PMSN | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ParameterMaintenanceDocument | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_DV | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_PMVC | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_SACC | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| NamespaceMaintenanceDocument | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_ACQS | 12 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_IB | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_PMALST | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_SOPT | 5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_ACCT | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_PMVT | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_PMCA | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_PMPT | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_FFD | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_BA | 3 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_PMST | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_ACQBTHUPLOAD | 22 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_CM | 3 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_INVCSBTYP | 7 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_PYMNTMTHD | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_FLU | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_AV | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_PMCP | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_GACC | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| CountryMaintenanceDocument | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_APRD | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_ORDQU | 5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| IdentityManagementGroupDocument | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_PVEN | 12 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_REQS | 352 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_CR | 4 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| DocumentTypeDocument | 78 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_OSTY | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_CSPR | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_INVCTYP | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ComponentMaintenanceDocument | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_CCTY | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| CountyMaintenanceDocument | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OLE_CCR | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Date Range | |
|----------------|---|
| Begin Date: | <input type="text" value="01/01/1900"/> |
| End Date: | <input type="text" value="01/01/2400"/> |
| Routing Status | Number of Documents for Date Range |
| CANCELED: | 0 |
| DISAPPROVED: | 0 |
| ENROUTE: | 19 |
| EXCEPTION: | 0 |
| FINAL: | 425 |
| INITIATED: | 540 |
| PROCESSED: | 1 |
| SAVED: | 35 |

Chapter 3. Services and Functions

Administrative Documents



Discovery Service



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

Note

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

Click the **Start** button.

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

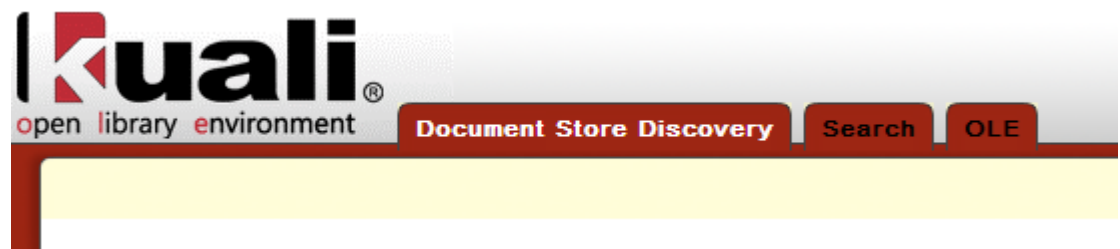
Indexing is complete when you see the "Index End Time"



The Grey tabs are explained here:

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

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



Document Store Search

Performing a Document Store Search

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

Advanced Search

Document Category Sort By
Document Type
Document Format

The following special characters ~,!,(,),{,},[,],',;,- are ignored in search text.

in Search Field:

AND OR NOT

in Search Field:

AND OR NOT

in Search Field:

AND OR NOT

in Search Field:

AND OR NOT

in Search Field:

Advance Search Field Definitions

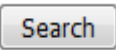
| Title | Description |
|-------------------|---|
| Document Category | General category of documents being searched. |
| Document Type | Type of documents associated with a category. For the category Work , these include bibliographic, licenses, Instances, items, etc. |
| Document Format | Limits searches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

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

Note

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

Services and Functions Administrative Documents

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



Revise Search New Search

Your Search: **DocCategory** - work **DocType** - bibliographic **DocFormat** - all
Search Terms - (all_text:(mysteries))
Limited To:(No limits applied)

1-3 of 3 results

Sort By Title (A-Z) Show 25

[Expand All] | [Collapse All]

Limit Your Search...

- Author**
 - Gill, Gillian (1)
 - Krefelder Kunstmuseen (Germany) (1)
 - McNamara, Frances. (1)
- Subject**
 - Detective and mystery stories -- Periodicals. (1)
 - Marcaccio, Fabian, 1963- Exhibitions. (1)
 - Pullman Strike, 1894 -- Fiction. (1)
- Format**
 - Book (2)
 - Journal/Periodical (1)
- Language**
 - English (2)
 - German and English text. (1)

1. Agatha Christie : the woman and her **mysteries** /

Local Identifier: 59
Author: Gill, Gillian
Publisher: Berlin : Kerber Verlag, 2012.
Description:
Subject: Marcaccio, Fabian, 1963- Exhibitions.
Location:
Format: Book

[View](#) [Edit](#) UC/DLL/Law-PR6005.H84Z8G5 1990 UC/JRL/Gen-PR6005.H84Z8G5 1990 UC/JRL/Gen-PR6005.H84Z8G5 1990

2. Death at Pullman /

Local Identifier: 120
Author: McNamara, Frances.
Publisher: [Forest Park, Ill.] : Allium Press of Chicago, c2011.
Description:
Subject: Pullman Strike, 1894 -- Fiction.
Location:
Format: Book

[View](#) [Edit](#) UC/JRL/Gen-PS3613.C58583 D43 2011 UC/UCX/Order-PS3613.C58583 D43 2011 UC/JRL/Gen-PS3613.C58583 D43 2011 B-EDUC/BED-STACKS-PS3613.C5858D43 2008

3. **Mystery** annual.

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

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

▼ **Author**

- Gill, Gillian (1)
- Krefelder Kunstmuseen (Germany) (1)
- McNamara, Frances. (1)

▼ **Subject**

- Detective and mystery stories -- Periodicals. (1)
- Marcaccio, Fabin, 1963- Exhibitions. (1)
- Pullman Strike, 1894 -- Fiction. (1)

▼ **Format**

- Book (2)
- Journal/Periodical (1)

▼ **Language**

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

Document Store Discovery

[Revise Search](#) [New Search](#)

Your Search: **DocCategory** - work **DocType** - bibliographic **DocFormat** - all
SearchTerms-(Title:(mysteries))NOT(Author:(christie))
Limited To:Book ✖ Gill, Gillian ✖

Limit Your Search...

1-1 of 1 results

▼ **Author**

- Gill, Gillian (1)

▼ **Subject**

1. Agatha Christie : the woman and her **mysteries** /

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

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

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

Services and Functions Administrative Documents

Revise Search New Search

Your Search: **DocCategory** - work **DocType** - bibliographic **DocFormat** - marc
Search Terms: (Title:(ot*ello))NOT(Author:(shak*))
Limited To: Verdi, Giuseppe, Sound recording

Limit Your Search...

Selected page: 1 Go to page

1-25 of 61 results

Sort By Pub date (new-old) Show 25
[Expand All] | [Collapse All]

1. Selezioni da: **Otello**

2. **Otello**

3. Ballet music from Les Vêpres siciliennes, Macbeth, Don Carlos, **Otello**, Aida

4. **Otello**

Author

- Verdi, Giuseppe, (61)
- Boito, Arrigo, (15)
- Del Monaco, Mario, (9)
- Gobbi, Tito (7)
- Martinelli, Giovanni, (7)

more...

Subject

- Operas, (35)

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

Selected page: 1 Go to page

1-25 of 54 results

Sort By

1. **Otello** Giuseppe Verdi.

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

2. Death at Pullman /

Local Identifier: 120
Author: McNamara, Frances.
Publisher: [Forest Park, Ill.] : Allium Press of Chicago, c2011.
Description:
Subject: Pullman Strike, 1894 -- Fiction.
Location:
Format: Book

View Edit UC/JRL/Gen-PS3613.C58583 D43 2011
PS3613.C58583 D43 2011 B-EDUC/BED-STACKS-PS3613.C58583 D43 2011


3. **Mystery** annual.

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

Services and Functions Administrative Documents

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

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

Click  to open the Bibliographic Editor.

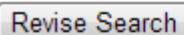
Note

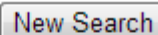
For more information about the bibliographic editor, see the [Editors](#) section of the [Guide to the Describe and Manage Module](#).

Note

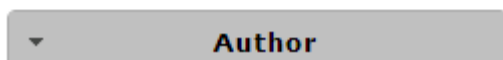
Note: The View and Edit buttons will most likely change in future releases.

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

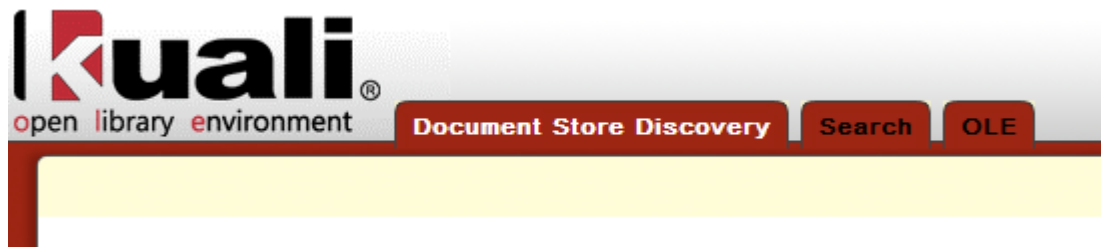




Limit Your Search...



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



OLE Instance Searching

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

1. Agatha Christie : the woman and her **mysteries** /

Local Identifier: 59
Author: Gill, Gillian
Publisher: Berlin : Kerber Verlag, 2012.
Description:
Subject: Marcaccio, Fabian, 1963- Exhibitions.
Location:
Format: Book

[View](#) [Edit](#) [UC/DLL/Law-PR6005.H84Z8G5 1990](#) [UC/JRL/Gen-PR6005.H84Z8G5 1990](#) [UC/JRL/Gen-PR6005.H84Z8G5 1990](#)

2. Death at Pullman /

Local Identifier: 120
Author: McNamara, Frances.
Publisher: [Forest Park, Ill.] : Allium Press of Chicago, c2011.
Description:
Subject: Pullman Strike, 1894 -- Fiction.
Location:
Format: Book

[View](#) [Edit](#) [UC/JRL/Gen-PS3613.C58583 D43 2011](#) [UC/UCX/Order-PS3613.C58583 D43 2011](#) [UC/JRL/Gen-PS3613.C58583 D43 2011](#) [B-EDUC/BED-STACKS-PS3613.C5858D43 2008](#)

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

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

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

Services and Functions Administrative Documents

Advanced Search

Document Category Sort By

Document Type

Document Format

The following special characters ~,!,(,),{,},[,],',:,- are ignored in search text.

in Search Field:

AND OR NOT

in Search Field:

AND OR NOT

in Search Field:

- All
- Local Identifier
- Call Number
- Call Number Prefix
- Call Number Type Code
- Call Number Type Name
- Shelving Order
- Uri
- Holdings Note
- Receipt Status Code
- Location

Or further, test searching on Item data.

Advanced Search

Document Category Sort By

Document Type

Document Format

The following special characters ~,!,(,),{,},[,],',:,- are ignored in search text.

in Search Field:

AND OR NOT

in Search Field:

AND OR NOT

in Search Field:

AND OR NOT

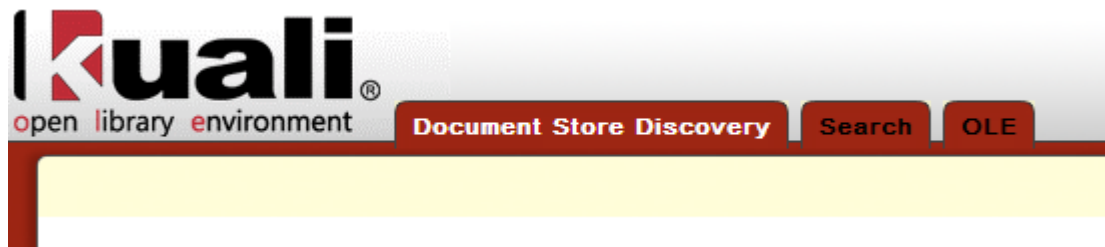
in Search Field:

- All
- Local Identifier
- Call Number
- Call Number Prefix
- Call Number Type Code
- Call Number Type Name
- Shelving Order
- Item Identifier
- Item Status Code
- Item Barcode
- Item Uri
- Purchase Order Line Item Identifier
- Vendor Line Item Identifier
- Barcode ARSL
- Statistical Searching Code
- Statistical Searching Name
- Item Type Name
- Item Type Code
- Copy Number
- Enumeration

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

Notes and Tips on Bib, Instance and Item searching

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



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

Note

For more information about the Instance editor, see the [Instance Editor](#) section of the [Guide to the Describe and Manage Module](#).

DocStore Service



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

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

Patron Merge



Patron Merge

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

Process Overview

Patron Merge

First Name :

Last Name :

Patron Type :

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

2. Click 

A list of persons will appear below the search.

Patron Merge

First Name :

Last Name :

Patron Type :

List of Patrons

Show entries

| Survivor | Duplicate Patron | Barcode | First Name | Last Name | Patron Type |
|--------------------------|--------------------------|------------------|------------|-----------|-------------|
| <input type="checkbox"/> | <input type="checkbox"/> | 6010570003043558 | Stephanie | Sample | UnderGrad |
| <input type="checkbox"/> | <input type="checkbox"/> | 6010570001321477 | Caprice | Sample | Staff |
| <input type="checkbox"/> | <input type="checkbox"/> | 6010570003113021 | Kathryn | Sample | UnderGrad |
| <input type="checkbox"/> | <input type="checkbox"/> | 6010570002473400 | Andrew | Sample | UnderGrad |
| <input type="checkbox"/> | <input type="checkbox"/> | 6010570003130918 | Jessica | Sample | Guest |
| <input type="checkbox"/> | <input type="checkbox"/> | 6010570003050306 | Benjamin | Sample | UnderGrad |

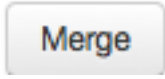
Showing 1 to 6 of 6 entries

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

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

5.

Click



Chapter 4. System Configuration Administrative Documents

Admin

> System Configuration >

OLE

[Data Mapping Field Definition](#)

[External Data Sources \(z39.50 connection\)](#)

[Functional Field Description](#)

[Message Of The Day](#)

[System Options](#)

[Search Framework Configuration](#)

PARAMETERS

[Namespace](#)

[Parameter](#)

[Parameter Component](#)

[Parameter Type](#)

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

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

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

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

Data Mapping Field Definition

Admin

> System Configuration

> OLE

> • Data Mapping Field Definition

> Data Mapping Field Definition Lookup

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

Note

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

Document Layout

Data Mapping Field Definition Lookup * required field

| | |
|--|----------------------|
| * Namespace: | <input type="text"/> |
| * Component: | <input type="text"/> |
| Field: | <input type="text"/> |
| Description: | <input type="text"/> |
| Database Table Name: | <input type="text"/> |
| Database Field Name: | <input type="text"/> |
| <input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/> | |

Data Mapping Field Definition Lookup definition

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

Data Mapping Field Definition Lookup * required field

| | |
|--|-----------------------------|
| * Namespace: | OLE-COA - Chart of Accounts |
| * Component: | Account |
| Field: | Account Number |
| Description: | <input type="text"/> |
| Database Table Name: | <input type="text"/> |
| Database Field Name: | <input type="text"/> |
| <input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/> | |

One item retrieved.

| Namespace | Component | Field | Description | Database Table Name | Database Field Name |
|-----------|-----------|--------------------------------|---|---------------------|---------------------|
| OLE-COA | Account | Account Number | Identifier for a pool of funds assigned to a specific university entit... | CA_ACCOUNT_T | ACCOUNT_NBR |

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

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

close

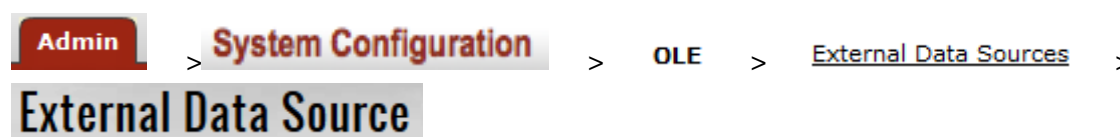
Data Mapping Field Definition Inquiry

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

Data Mapping Field Definition Inquiry definition

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

External Data Sources (z39.50 connection)



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

Note

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

Document Layout

System Configuration Administrative Documents

| | | |
|-----------------------------|-----------------------------|---|
| External Data Source | Document Number: 4358 | Document Status: INITIATED |
| | Initiator Network Id: admin | Creation Timestamp: 03:49 PM 08/16/2013 |

* indicates required field

▼ Document Overview

| | |
|--|---|
| * Description: <input style="width: 90%;" type="text"/> | Explanation: <input style="width: 90%; height: 40px;" type="text"/> |
| Organization Document Number: <input style="width: 80%;" type="text"/> | |

▼ Add/Edit Data Source

| | |
|--------------------|--|
| Name: | <input style="width: 90%;" type="text"/> |
| Description: | <input style="width: 90%;" type="text"/> |
| Domain Name: | <input style="width: 90%;" type="text"/> |
| Port Number: | <input style="width: 90%;" type="text"/> |
| LogIn Id: | <input style="width: 90%;" type="text"/> |
| Authorization Key: | <input style="width: 90%;" type="text"/> |
| Password: | <input style="width: 90%;" type="text"/> |

▶ Notes and Attachments (0)

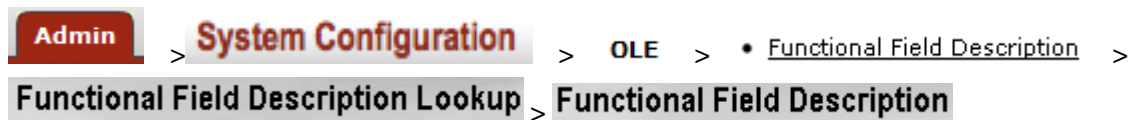
▶ Ad Hoc Recipients

▶ Route Log

Add/Edit Data Source tab definition

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

Functional Field Description



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

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

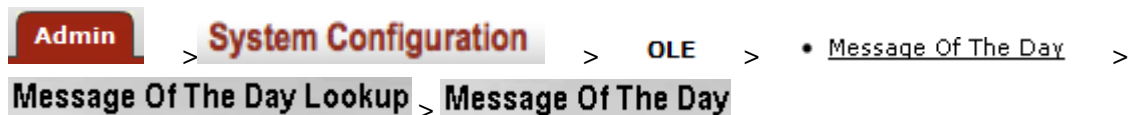
Document Layout

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

Functional Field Description tab definition

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

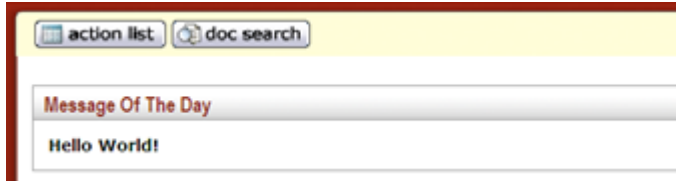
Message Of The Day



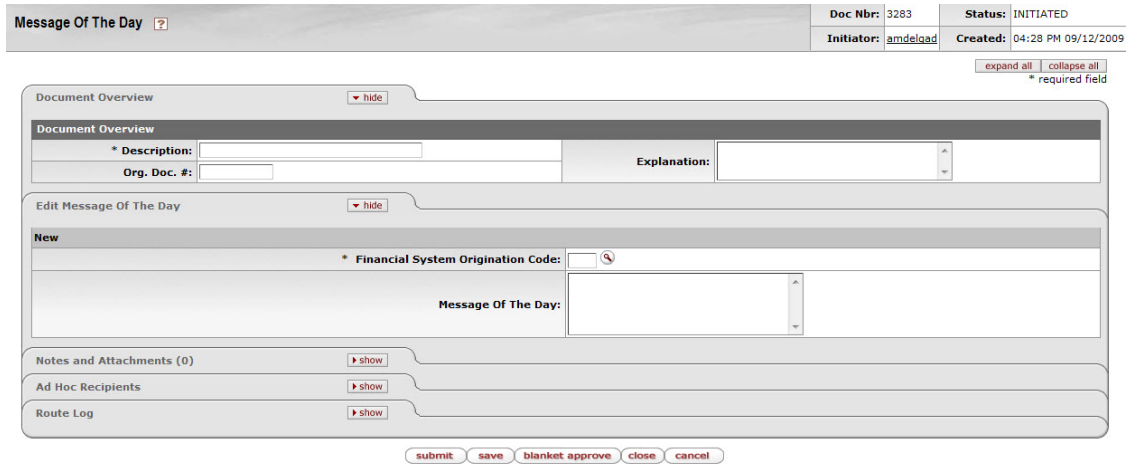
The Message of the Day document updates a message that appears on each tab of the OLE portal. It is an easy way to share information with OLE users and can be updated at any time.

Note

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



Document Layout



Edit Message Of The Day Tab

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

Edit Message of the Day tab definition

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

Implementation Information

You must have at least one item in the Message of the Day table (FP_MOTD_T), otherwise you will see the message "Unable to retrieve message of the day".

The Message of the Day should only display the message whose origination code (FS_ORIGIN_CODE_T) is equal to the origination code contained in Home Origination (FS_HOME_ORIGIN_T). OLE defaults to "01" for the Home Origination code.

System Options



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

Note

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

Tip

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

Document Layout

System Options ? Doc Nbr: 3293 Status: INITIATED
Initiator: amdelgad Created: 04:56 PM 09/12/2009

[expand all](#) [collapse all](#)
* required field

Document Overview hide

Document Overview

* Description: Explanation:

Org. Doc. #:

Edit System Options hide

New

* Fiscal Year:

* Fiscal Year Name:

* Fiscal Year Start Year:

* Fiscal Year Start Month:

* Beginning Balances Loaded Indicator:

* Budget Checking Options Code:

* Chart Code:

* Actual Balance Type:

* Budget Checking Balance Type:

* External Encumbrance Balance Type:

* Internal Encumbrance Balance Type:

* Pre-Encumbrance Balance Type:

* Eliminations Balance Type:

* Expenditure/Expense Object Type:

* Expenditure Not Expense Object Type:

* Expense Not Expenditure Object Type:

* Income/Cash Object Type:

* Income Not Cash Object Type:

* Cash Not Income Object Type:

* Assets Object Type:

* Liabilities Object Type:

* Fund Balance Object Type:

* Cost Share Encumbrance Balance Type:

* Base Budget Balance Type:

* Monthly Budget Balance Type:

* Transfer In Object Type:

* Transfer Out Object Type:

* Nominal Closing Balances Balance Type:

Notes and Attachments (0) show

Ad Hoc Recipients show

Route Log show















submit save blanket approve close cancel

Edit System Options Tab








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

Edit System Options tab definition

System Configuration Administrative Documents

| Title | Description |
|-------------------------------------|--|
| Fiscal Year | Required. Enter the fiscal year for which values are being defined. |
| Fiscal Year Name | Required. Enter the descriptive name of the fiscal year. |
| Fiscal Year Start Year | Required. Enter the calendar year when the fiscal year begins. |
| Fiscal Year Start Month | Required. Enter the calendar month when the fiscal year begins |
| Fiscal Year | Required. Enter the fiscal year for which values are being defined. |
| Beginning Balances Loaded Indicator | Optional. Select the check box if the beginning balances for the fiscal year have been loaded. If beginning balances have not been loaded then cash level sufficient funds checking must check both the previous and current fiscal years. Clear the check box if the beginning balances for the fiscal year have not been loaded. |
| Budget Checking Options Code | Required. Select the check box if sufficient funds checking is enabled for the fiscal year. Clear the check box if it is not. |
| Chart Code | Required. Enter the university level chart code defined for the fiscal year, or search for it from the Chart lookup  . |
| Actual Balance Type | Required. Enter the balance type used to identify an Actual in the fiscal year, or search for it from the Balance Type lookup  . |
| Budget Checking Balance Type | Required. Enter the balance type used to identify Budget Checking in the fiscal year, or search for it from the Balance Type lookup  . |
| External Encumbrance Balance Type | Required. Enter the balance type used to identify External Encumbrances in the fiscal year, or search for it from the Balance Type lookup  . |
| Internal Encumbrance Balance Type | Required. Enter the balance type used to identify Internal Encumbrances in the fiscal year, or search for it from the Balance Type lookup  . |
| Pre-Encumbrance Balance Type | Required. Enter the balance type used to identify Pre-Encumbrances in the fiscal year, or search for it from the Balance Type lookup  . |
| Eliminations Balance Type | Required. Enter the balance type used to identify Eliminations in the fiscal year, or search for it from the Balance Type lookup  . |
| Expenditure/Expense Object Type | Required. Enter the object type used to identify the Expenditure/Expense category in the fiscal year, or search for it from the Object Type lookup  . |
| Expenditure Not Expense Object Type | Required. Enter the object Type used to identify the Expenditure Not Expense category in this fiscal year, or search for it from the Object Type lookup  . |
| Expense Not Expenditure Object Type | Required. Enter the object Type used to identify the Expense Not Expenditure category in the fiscal year, or search for it from the Object Type lookup  . |
| Income/Cash Object Type | Required. Enter the object Type used to identify the Income/Cash category in the fiscal year, or search for it from the Object Type lookup  . |
| Income Not Cash Object Type | Required. Enter the object type used to identify the Income Not Cash category in the fiscal year, or search for it from the Object Type lookup  . |
| Cash Not Income Object Type | Required. Enter the object type used to identify the Cash Not Income category in the fiscal year or search for it from the Object Type lookup  . |
| Assets Object Type | Required. Enter the object type used to identify the Asset category in the fiscal year, or search for it from the Object Type lookup  . |
| Liabilities Object Type | Required. Enter the object type used to identify the Liabilities category in the fiscal year, or search for it from the Object Type lookup  . |

System Configuration
Administrative Documents

| | |
|--|--|
| Fund Balance Object Type | Required. Enter the object type used to identify the Fund Balance category in the fiscal year, or search for it from the Object Type lookup  . |
| Cost Share Encumbrance Balance Object Type | Required. Enter the object type used to identify cost share encumbrances in the fiscal year, or search for it from the Object Type lookup  . |
| Base Budget Balance Type | Required. Enter the object type used to identify Base Budget in the fiscal year, or search for it from the Object Type lookup  . |
| Monthly Budget Balance Type | Required. Enter the object type used to Monthly Budget in the fiscal year, or search for it from the Object Type lookup  . |
| Transfer In Object Type | Required. Enter the object type used to identify Transfer In transactions in the fiscal year, or search for it from the Object Type lookup  . |
| Transfer Out Object Type | Required. Enter the object type used to identify Transfer Out transactions in the fiscal year, or search for it from the Object Type lookup  . |
| Nominal Closing Balances Balance Type | Required. Enter the object type used to identify Nominal Balance closing entries in the fiscal year, or search for it from the Object Type lookup  . |

Search Framework Configuration

Admin >
 System Configuration >
 OLE >
 Search Framework Configuration >

Search Framework Configuration

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

Document Layout

Search Framework Configuration

Doc Types

| * Name (Unique) | * Label | Description | Actions |
|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |
| bibliographic | Bibliographic | <input type="text"/> | |
| license | License | <input type="text"/> | |
| holdings | Holdings | <input type="text"/> | |
| item | Item | <input type="text"/> | |
| eHoldings | EHoldings | <input type="text"/> | |

Doc Formats

Document Type:

| * Name (Unique) | * Label | Description | Actions |
|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

Doc Fields

Document Type: Document Format:

| * Name | * Label | Description | Is Search | Is Display | Global Edit | Is Export | Actions |
|----------------------|----------------------|----------------------|--------------------------|--------------------------|--------------------------|--------------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="add"/> |

Search Result Page Size

| Size | Actions |
|----------------------|------------------------------------|
| <input type="text"/> | <input type="button" value="add"/> |
| 10 | |
| 25 | |
| 50 | |
| 75 | |
| 100 | |

Facet Page Sizes

Facet Page Size Short:

Facet Page Size Long:

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

Doc Types Tab

▼ Doc Types

| * Name (Unique) | * Label | Description |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| bibliographic | Bibliographic | <input type="text"/> |
| license | License | <input type="text"/> |
| holdings | Holdings | <input type="text"/> |
| item | Item | <input type="text"/> |
| eHoldings | EHoldings | <input type="text"/> |

Save

Reset

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

Search Workbench ?

Document Type:

Select Records By:

The following special characters, \, ^, are ignored in search text.

Search For: All of these In Field:

AND OR NOT

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

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

Warning

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

Doc Types Column definitions

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

Doc Formats Tab

▼ Doc Formats

Document Type:

| * Name (Unique) | * Label | Description | Actions |
|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

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

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

Search Framework Configuration

▶ Doc Types

▼ Doc Formats

Document Type:

| * Name (Unique) | * Label | Description | Actions |
|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

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

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

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

▼ Doc Formats

Document Type:

| * Name (Unique) | * Label | Description | Actions |
|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |
| dublin | Dublin Core | <input type="text"/> | |
| dublinunq | Dublin Unqualified | <input type="text"/> | |
| marc | MARC | <input type="text"/> | |

The format definitions along with the [Doc Types](#) are used in the [Doc Fields](#) section described below.

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

Warning

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

Doc Format Column definitions

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

Doc Fields Tab

▼ Doc Fields

Document Type: Document Format:

| * Name | * Label | Description | Is Search | Is Display | Global Edit | Is Export | Actions |
|----------------------|----------------------|----------------------|--------------------------|--------------------------|--------------------------|--------------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="add"/> |

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

Note

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

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

Click the **Start** button.

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

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

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

Search Framework Configuration

▶ Doc Types

▶ Doc Formats

▼ Doc Fields

Document Type: Document Format:

| * Name | * Label | Description | Exc |
|----------------------|----------------------|----------------------|--------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> |

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

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

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

System Configuration Administrative Documents

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

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

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

▼ Doc Fields

Document Type: Document Format:

| Name | Label | Description | Path Include | Path Exclude | Is Search? | Is Display? | Global Edit? | Is Export? | Is Facet? | Actions |
|----------------------|----------------------|----------------------|--------------------------|------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="add"/> |
| Author_display | Author | | 100-a;b;c;d;e;q,110-a;b; | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |
| Author_facet | Author | | 100,110,111,700,710,71 | 100-6,100-7,100-7,110- | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Author_search | Author | | 100-a;b;c;d;q,110-a;b;c; | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |
| Author_sort | Author | | 100-a,110-a | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |
| Barcode_display | Barcode | | 999-i | | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |

Doc Fields definitions

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

System Configuration
Administrative Documents

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

Path Syntax

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

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

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

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

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

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

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

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

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

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

System Configuration Administrative Documents

▼ Doc Fields

Document Type: Document Format:

| Name | Label | Description | Is Search | Is Display | Global Edit | Is Export | Actions |
|--------------------------|----------------------|----------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="add"/> |
| AccessLocation_display | Access Information | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Authentication_display | Access Information | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| CallNumber_display | Call Number | <input type="text"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| CallNumber_search | Call Number | <input type="text"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| CallNumberPrefix_display | Call Number Prefix | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| CallNumberPrefix_search | Call Number Prefix | <input type="text"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |

Doc Fields definitions

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

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

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

Cautionary Notes

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

Note

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

Click the **Start** button.

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

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

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

Doc Fields for Document Type Licenses

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

Search Results Page Size Tab

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

▼ Search Result Page Size

| Size | Actions |
|----------------------------------|------------------------------------|
| <input type="text"/> | <input type="button" value="add"/> |
| <input type="text" value="10"/> | |
| <input type="text" value="25"/> | |
| <input type="text" value="50"/> | |
| <input type="text" value="75"/> | |
| <input type="text" value="100"/> | |

Search Result Page Size Column definitions

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

Facet Page Size Tab

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

▼ Facet Page Sizes

Facet Page Size Short:

Facet Page Size Long:

Process Overview

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

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

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

Example

An example of how indexing and searching is done:

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

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

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

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

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

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

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

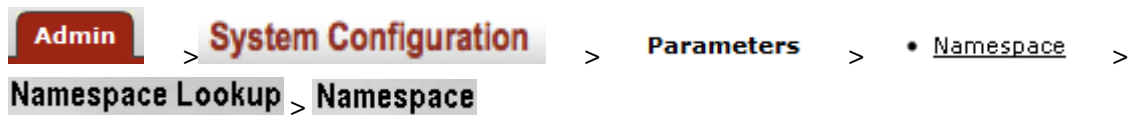
Both **_search** and **_display** fields are updated in Solr whenever a MARC record is added or updated in OLE. And the **Path Include** and **Path Exclude** definitions that are available at that time will be used for updating Solr.

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

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

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

Namespace



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

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

Document Layout

The screenshot shows the 'Namespace' document layout. At the top, there is a header with the document title 'Namespace' and a help icon. Below this is a table with document details: 'Doc Nbr: 3361', 'Status: INITIATED', 'Initiator: ole-khuntev', and 'Created: 02:03 PM 06/20/2013'. There are 'expand all' and 'collapse all' buttons, and a note '* required field'. The main content area is divided into several sections: 'Document Overview' with fields for 'Description' and 'Explanation'; 'Edit Namespace' with a 'New' section containing fields for 'Namespace Code', 'Namespace Name', 'Application ID', and 'Active Indicator' (checked); 'Notes and Attachments (0)', 'Ad Hoc Recipients', and 'Route Log', each with a 'show' button. At the bottom, there are 'submit', 'save', 'close', and 'cancel' buttons.

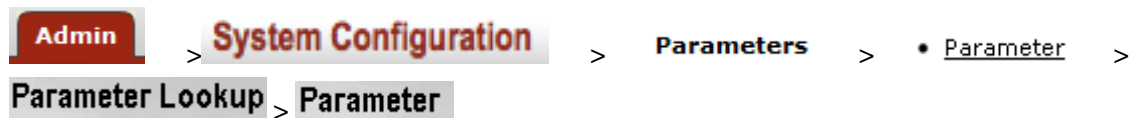
Edit Namespace Tab

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

Edit Namespace tab definition

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

Parameter



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

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

Document Layout

Parameter Maintenance Document ?

| | |
|--------------------------------|-------------------------------------|
| Doc Nbr: 3363 | Status: INITIATED |
| Initiator: ole-khuntley | Created: 02:12 PM 06/20/2013 |

expand all collapse all
* required field

Document Overview ▼ hide

*** Description:**

Organization Document Number:

Explanation:

Edit Parameter ▼ hide

New

*** Namespace Code:**

*** Component:**

*** Application ID:**

*** Parameter Name:**

Parameter Value:

*** Parameter Description:**

*** Parameter Type Code:**

*** Parameter Constraint Code:** Allowed Denied

Notes and Attachments (0) ▶ show

Ad Hoc Recipients ▶ show

Route Log ▶ show

submit
save
close
cancel

Edit Parameter Tab

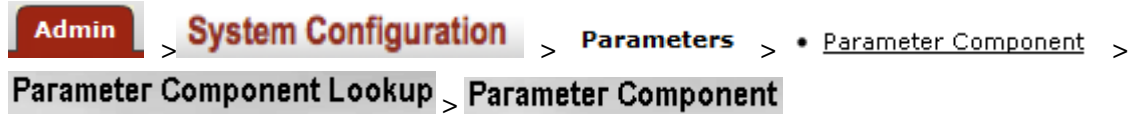
The Parameter document includes the **Edit Parameter** tab. This tab is where you define the modules, type, rules, and description of the parameters.

Edit Parameter tab definition

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

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

Parameter Component



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

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

Document Layout

Component Maintenance Document ?
Doc Nbr: 3365 Status: INITIATED

Initiator: ole-khuntlev
Created: 02:19 PM 06/20/2013

expand all collapse all

* required field

Document Overview ▼ hide

*** Description:**

Organization Document Number:

Explanation:

Edit Component ▼ hide

New

*** Namespace Name:** ▼ 🔍

*** Component:**

*** Component Name:**

Active Indicator:

Notes and Attachments (0) ▶ show

Ad Hoc Recipients ▶ show

Route Log ▶ show

submit save close cancel

Edit Component Tab

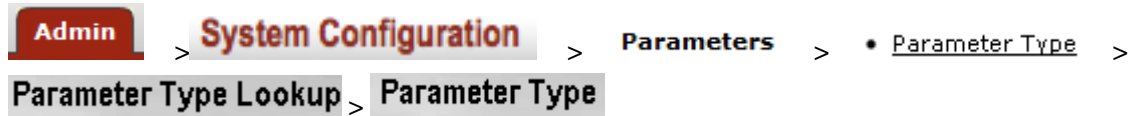
The Parameter Component document includes the **Edit Component Type** tab.

Edit Component tab definition

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

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

Parameter Type



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

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

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

Document Layout

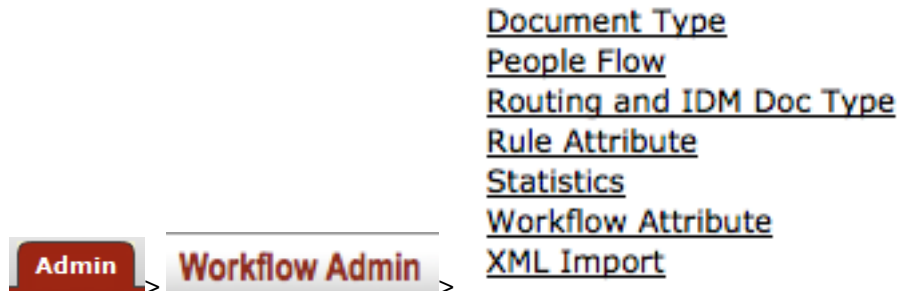
Edit Parameter Type Tab

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

Edit Parameter Type tab definition

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

Chapter 5. Workflow Administrative Documents

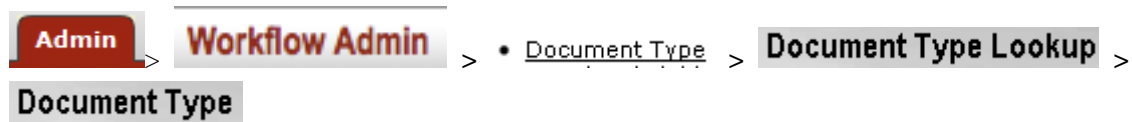


The Kuali OLE Modules submenu allows you to perform a variety of functional and technical activities that affect the entire system. This includes uploading XML and People Flow rules to modify workflows. Users may also access the Staff Upload interface.

Note

For information on Statistics, see the section [Statistics Report](#)

Document Type



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

Note

For more information about workflow, see the [OLE Workflow Overview and Key Concepts](#) on the [Guide to OLE Basic Functionality and Key Concepts](#).

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

Document Layout

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

Edit Document Type Tab

Edit Document Type tab definition

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

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

Fields Available for Retroactive Application Tab

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

The screenshot shows a web form titled "Fields Available for Retroactive Application" with a "hide" button. The form contains the following fields:

- Label:** A text input field.
- Description:** A larger text input area.
- Help Definition URL:** A text input field.
- Apply Label Change Retroactively:** A checkbox, currently unchecked.

Fields Available for Retroactive Application tab definition

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

Document Type Inquiry

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

The screenshot shows a "Document Type Inquiry" window with an "expand all" and "collapse all" button. The main area displays the following details for a document type:

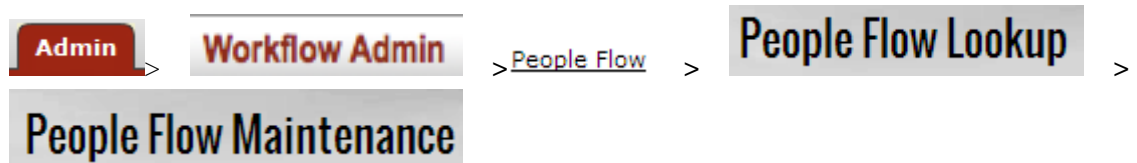
- Document Type:** (with a "hide" button)
- Parent Id:** 3029
- Parent Name:** OLEFinancialProcessingSimpleMaintenanceDocument
- Id:** 3127
- Name:** OLE_DVWT
- Label:** Disbursement Voucher Wire Charge
- Description:**
- Document Handler URL:** \${ole.url}/kr/maintenance.do?methodToCall=docHandler (Inherited from Parent)
- Help Definition URL:** default.htm?url=WordDocuments%2Fdisbursementvoucherwirecharge.htm
- Document Search Help URL:**
- Post Processor Class:** org.kuali.ole.sys.document.workflow.PostProcessor (Inherited from Parent)
- Notification From Address:**
- Application ID:** OLE (Inherited from Parent)
- Active Indicator:** Yes

At the bottom of the window are "export" and "close" buttons.

Document Type Inquiry definition

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

PeopleFlow



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

Getting Started

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

People Flow Lookup

[Create New](#)

| | |
|------------------------|--|
| Id: | <input style="width: 90%;" type="text"/> |
| Namespace Code: | <input style="width: 90%;" type="text"/> |
| Name: | <input style="width: 90%;" type="text"/> |
| Type: | <input style="width: 90%;" type="text"/> |
| Active: | <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both |

Document Layout

| | | |
|--------------------------------|---|--|
| People Flow Maintenance | Document Number: 6374 | Document Status: INITIATED |
| | Initiator Network Id: ole-khuntley | Creation Timestamp: 01:31 PM 08/30/2013 |

* indicates required field

Document Overview

| | | | |
|--------------------------------------|----------------------|---------------------|----------------------|
| * Description: | <input type="text"/> | Explanation: | <input type="text"/> |
| Organization Document Number: | <input type="text"/> | | |

PeopleFlow Summary

| | | | |
|--------------------------|----------------------|---------------------|-------------------------------------|
| * Namespace Code: | <input type="text"/> | Description: | <input type="text"/> |
| * Name: | <input type="text"/> | | |
| Type: | <input type="text"/> | Active: | <input checked="" type="checkbox"/> |

PeopleFlow Members

add

| | |
|-----------------------|---|
| * Stop: | <input type="text" value="1"/> |
| * Member Type: | <input type="text" value="Principal"/> |
| * Member: | <input type="text" value="Name"/> <input type="button" value=""/> |

Notes and Attachments (0)

Ad Hoc Recipients

Route Log

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

PeopleFlow Summary Tab

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

PeopleFlow Summary


| | | | |
|--------------------------|----------------------|---------------------|-------------------------------------|
| * Namespace Code: | <input type="text"/> | Description: | <input type="text"/> |
| * Name: | <input type="text"/> | | |
| Type: | <input type="text"/> | Active: | <input checked="" type="checkbox"/> |

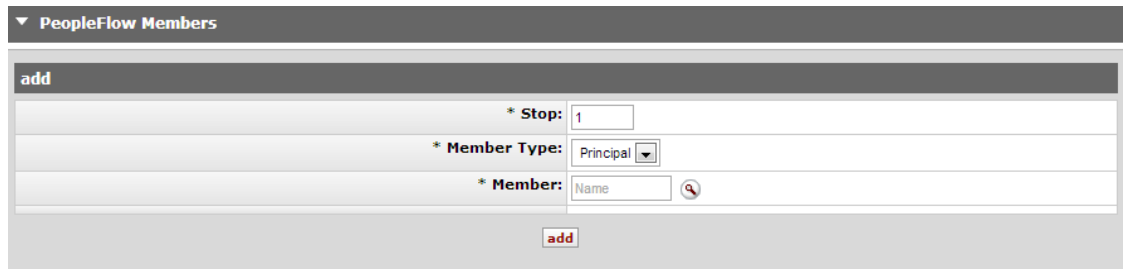
PeopleFlow Summary tab definition

| | |
|-------|-------------|
| Title | Description |
|-------|-------------|


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

PeopleFlow Members Tab


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



PeopleFlow Summary tab definition

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

PeopleFlow Members Tab continued

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

| * Stop: 3 | | | | |
|--|---------------|------------------------------|-----------------------|---------------------------------------|
| * Member Type: Role | | | | |
| * Member: KR-LIC : OLE_LicenseReviewer | | | | |
| * All or First Action: FIRST | | | | |
| <input type="button" value="add"/> | | | | |
| * Stop | * Member Type | * Member | * All or First Action | Actions |
| 1 | Role | KR-LIC : OLE_LicenseReviewer | ALL | <input type="button" value="delete"/> |
| Member Delegates | | | | |
| * Member Type | * Member | * Delegation Type Code | * All or First Action | Actions |
| Principal | Name | Primary | | <input type="button" value="add"/> |
| 2 | Role | KR-LIC : OLE_LicenseManager | FIRST | <input type="button" value="delete"/> |
| Member Delegates | | | | |
| * Member Type | * Member | * Delegation Type Code | * All or First Action | Actions |
| Principal | Name | Primary | | <input type="button" value="add"/> |

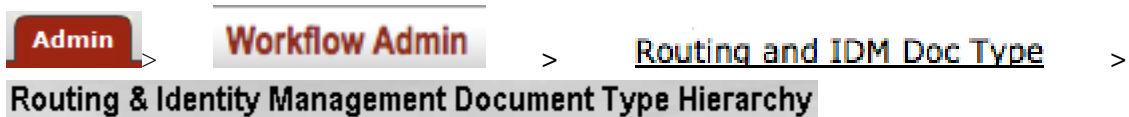
From here, **Member Delegates** may be added to allow others to take action for another person.

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

4. Click .

Click to remove the PeopleFlow stop.

Routing & Identity Management Document Type Hierarchy



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

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

Document Hierarchy View

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

| | | |
|--|------------------------------------|---|
| OpenLibraryEnvironmentTransactionalDocument | Edit Document Type | View Document Configuration |
| FinancialProcessingTransactionalDocument (OLEFinancialProcessingTransactionalDocument) | Edit Document Type | View Document Configuration |
| Advance Deposit (OLE AD) | Edit Document Type | View Document Configuration |
| Auxiliary Voucher (OLE AV) | Edit Document Type | View Document Configuration |
| Account | | |
| AccountingOrganizationHierarchy | | |
| Budget Adjustment (OLE BA) | Edit Document Type | View Document Configuration |
| Account | | |
| AccountingOrganizationHierarchy | | |
| Award | | |
| BudgetAdjustment | | |
| SubFund | | |
| Cash Management (OLE CMD) | Edit Document Type | View Document Configuration |
| Cash Receipt (OLE CR) | Edit Document Type | View Document Configuration |
| CashManagement | | |

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

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

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

| |
|--|
| Disbursement Voucher (DV) |
| Purchasing |
| Account |
| AccountingOrganizationHierarchy |
| Tax |
| Campus |
| Travel |
| PaymentMethod |
| Award |

Document Configuration View

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

Workflow Administrative Documents

Document Configuration - OLE_OBJT

▼ hide

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

▼ hide

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

Defined For This Document

| Template Name | Permission Name | Detail Values | Granted to Roles |
|---|---|--|--|
| Inherited From: OLEChartComplexMaintenanceDocument | | | |
| Template Name | Permission Name | Detail Values | Granted to Roles |
| Initiate Document (KR-SYS) | Initiate Document (Complex COA) (OLE-SELECT) | | OLE-SELECT Financial-AQ4 OLE-SELECT Accounting-AQ4 OLE-SELECT OLE User OLE-SYS User OLE-SELECT Financial-AQ5 |
| Edit Document (KR-NS) | Edit Document (Complex COA) (OLE-SELECT) | Route Node Name = AdHoc Route Status Code = R | OLE-SELECT Financial-AQ4 OLE-SELECT Accounting-AQ4 KR-WKFLW Approve Request Recipient OLE-SELECT Financial-AQ5 |
| Inherited From: OpenLibraryEnvironmentComplexMaintenanceDocument | | | |
| Edit Document (KR-NS) | Edit Document KFSM AdHoc R (OLE-SYS) | Route Node Name = AdHoc Route Status Code = R | KR-WKFLW Approve Request Recipient |
| Inherited From: OLE | | | |
| Template Name | Permission Name | Detail Values | Granted to Roles |
| Administer Routing for Document (KR-WKFLW) | Administer Routing for Document KFS (OLE-SYS) | | OLE-SYS Workflow Administrator |
| Blanket Approve Document (KR-WKFLW) | Blanket Approve Document KFS (OLE-SYS) | | OLE-SYS Manager |
| Initiate Document (KR-SYS) | Initiate Document KFS (OLE-SYS) | - | OLE-SYS User |
| Open Document (KR-NS) | Open Document KFS (OLE-SYS) | | KR-WKFLW Initiator or Reviewer OLE-SYS User |
| Save Document (KR-WKFLW) | Save Document KFS (OLE-SYS) | | OLE-SYS System User KR-NS Document Editor |
| Delete Note / Attachment (KR-NS) | Delete Note / Attachment OLE FALSE (OLE-SYS) | Created By Self Only = FALSE | OLE-SYS Manager |
| Ad Hoc Review Document (KR-WKFLW) | Ad Hoc Review Document KFS A (OLE-SYS) | Action Request Code = A | OLE-SYS User |
| Ad Hoc Review Document (KR-WKFLW) | Ad Hoc Review Document KFS F (OLE-SYS) | Action Request Code = F | OLE-SYS Active Faculty or Staff OLE-SYS User |
| Ad Hoc Review Document (KR-WKFLW) | Ad Hoc Review Document KFS K (OLE-SYS) | Action Request Code = K | OLE-SYS Active Faculty or Staff OLE-SYS User |
| Copy Document (KR-NS) | Copy Document KFS (OLE-SYS) | | KR-SYS Document Initiator |
| Add Message to Route Log (KR-WKFLW) | Add Message to Route Log KFS (OLE-SYS) | | KR-WKFLW Initiator or Reviewer |
| Recall Document (KR-WKFLW) | Recall Document OLE (OLE-SYS) | | |
| Super User Approve Single Action Request (KR-WKFLW) | Super User Approve Single Action Request OLE (OLE-SYS) | | |
| Super User Approve Document (KR-WKFLW) | Super User Approve Document OLE (OLE-SYS) | | |
| Super User Disapprove Document (KR-WKFLW) | Super User Disapprove Document OLE (OLE-SYS) | | |
| Open Document (KR-NS) | Open Document (OLE-SELECT) | - | OLE-SELECT OLE User |
| Initiate Document (KR-SYS) | Initiate OLE Documents (OLE-SELECT) | - | OLE-SELECT OLE User |
| Inherited From: KualDocument | | | |
| Template Name | Permission Name | Detail Values | Granted to Roles |
| Cancel Document (KR-WKFLW) | Cancel Document (KUALI) | Route Node Name = PreRoute | KR-WKFLW Initiator or Reviewer KR-NS Document Editor |
| Route Document (KR-WKFLW) | Route Document (KUALI) | | OLE-SYS System User KR-NS Document Editor |
| Edit Document (KR-NS) | Edit KualI ENROUTE Document Node Name PreRoute (KUALI) | Route Node Name = PreRoute | KR-WKFLW Initiator |
| Edit Document (KR-NS) | Edit KualI ENROUTE Document Route Status Code R (KUALI) | Route Status Code = R | KR-WKFLW Non-Ad Hoc Approve Request Recipient KR-WKFLW Approve Request Recipient |
| Add Note / Attachment (KR-NS) | Add Note / Attachment KualI Document (KUALI) | | KR-WKFLW Initiator or Reviewer |
| View Note / Attachment (KR-NS) | View Note / Attachment KualI Document (KUALI) | | KR-NS Document Opener |
| Send Ad Hoc Request (KR-NS) | Send FYI Request KualI Document (KR-SYS) | Action Request Code = F | KR-NS Document Opener |
| Send Ad Hoc Request (KR-NS) | Send Acknowledge Request KualI Document (KR-SYS) | Action Request Code = K | KR-NS Document Opener |
| Send Ad Hoc Request (KR-NS) | Send Approve Request KualI Document (KR-SYS) | Action Request Code = A | KR-NS Document Editor KR-WKFLW Approve Request Recipient |
| Add Message to Route Log (KR-WKFLW) | Add Message to Route Log (KUALI) | - | - |
| Send Ad Hoc Request (KR-NS) | Send Complete Request KualI Document (KR-SYS) | Action Request Code = C | KR-NS Document Opener |

▼ hide

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

Exception Routing

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

Route Node: Organization Hierarchy

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

Route Node: Chart

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

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

Document Information Tab

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

| Document Information ▼ hide | | | |
|--|---|-----------------------------|--|
| Name | OLE_OBJT Edit Document Type | Doc Handler URL | |
| Label | Object Code | Help URL | default.htm?url=WordDocuments%2Fobjectcode.htm |
| Parent Name | OLEChartComplexMaintenanceDocument | Child Document Types | |

Document Information tab definition

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

Permissions Tab

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

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

| Permissions ▼ hide | | | | |
|---|--|---|--|--|
| Gray lines that are stricken through represent inherited permissions that have been overridden by a more specific permission. | | | | |
| ▼ hide Defined For This Document | | | | |
| | Template Name | Permission Name | Detail Values | Granted to Roles |
| ▼ hide Inherited From: OLEChartComplexMaintenanceDocument | | | | |
| | Template Name | Permission Name | Detail Values | Granted to Roles |
| | Initiate Document (KR-SYS) | Initiate Document (Complex COA) (OLE-SELECT) | | OLE-SELECT Financial-AQ4 OLE-SELECT Accounting-AQ4 OLE-SELECT OLE User OLE-SYS User OLE-SELECT Financial-AQ5 |
| | Edit Document (KR-NS) | Edit Document (Complex COA) (OLE-SELECT) | Route Node Name = AdHoc Route Status Code = R | OLE-SELECT Financial-AQ4 OLE-SELECT Accounting-AQ4 KR-WKFLW Approve Request Recipient OLE-SELECT Financial-AQ5 |
| ▼ hide Inherited From: OpenLibraryEnvironmentComplexMaintenanceDocument | | | | |
| | Template Name | Permission Name | Detail Values | Granted to Roles |
| | Edit Document (KR-NS) | Edit Document KFSM AdHoc R (OLE-SYS) | Route Node Name = AdHoc Route Status Code = R | KR-WKFLW Approve Request Recipient |
| ▼ hide Inherited From: OLE | | | | |
| | Template Name | Permission Name | Detail Values | Granted to Roles |
| | Administer Routing for Document (KR-WKFLW) | Administer Routing for Document KFS (OLE-SYS) | | OLE-SYS Workflow Administrator |
| | Blanket Approve Document (KR-WKFLW) | Blanket Approve Document KFS (OLE-SYS) | | OLE-SYS Manager |

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

| ▼ hide Defined For This Document | | | | |
|---|---|--|--|--|
| Template Name | Permission Name | Detail Values | Granted to Roles | |
| ▼ hide Inherited From: OLEChartComplexMaintenanceDocument | | | | |
| Template Name | Permission Name | Detail Values | Granted to Roles | |
| Initiate Document (KR-SYS) | Initiate Document (Complex COA) (OLE-SELECT) | | OLE-SELECT Financial-AQ4 OLE-SELECT Accounting-AQ4 OLE-SELECT OLE User OLE-SYS User OLE-SELECT Financial-AQ5 | |
| Edit Document (KR-NS) | Edit Document (Complex COA) (OLE-SELECT) | Route Node Name = AdHoc Route Status Code = R | OLE-SELECT Financial-AQ4 OLE-SELECT Accounting-AQ4 KR-WKFLW Approve Request Recipient OLE-SELECT Financial-AQ5 | |
| ▼ hide Inherited From: OpenLibraryEnvironmentComplexMaintenanceDocument | | | | |
| Template Name | Permission Name | Detail Values | Granted to Roles | |
| Edit Document (KR-NS) | Edit Document KFSM AdHoc R (OLE-SYS) | Route Node Name = AdHoc Route Status Code = R | KR-WKFLW Approve Request Recipient | |
| ▼ hide Inherited From: OLE | | | | |
| Template Name | Permission Name | Detail Values | Granted to Roles | |
| Administer Routing for Document (KR-WKFLW) | Administer Routing for Document KFS (OLE-SYS) | | OLE-SYS Workflow Administrator OLE-SYS Manager | |
| Blanket Approve Document (KR-WKFLW) | Blanket Approve Document KFS (OLE-SYS) | | OLE-SYS User | |
| Initiate Document (KR-SYS) | Initiate Document KFS (OLE-SYS) | - | OLE-SYS User | |
| Open Document (KR-NS) | Open Document KFS (OLE-SYS) | | KR-WKFLW Initiator or Reviewer OLE-SYS User | |

Permissions tab definition

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

Workflow / Responsibilities Tab

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

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

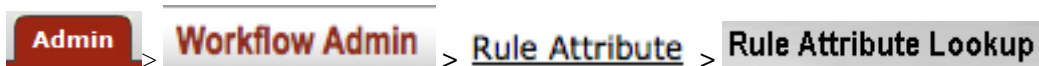
| Workflow / Responsibilities ▼ hide | | | | |
|--|-----------------------------------|--|---|---------------------|
| Gray lines that are stricken through represent inherited responsibilities that have been overridden by a more specific responsibilities. | | | | |
| Exception Routing | | | | |
| | Required | Action Details At Role Member Level | Granted to Roles | Inherited |
| | No | No | OLE-SYS Manager | OLE |
| Route Node: Account | | | | |
| | Required | Action Details At Role Member Level | Granted to Roles | Inherited |
| | Yes | No | OLE-SYS Fiscal Officer OLE-SYS Account Supervisor | No |
| | Yes | No | OLE-SYS Fiscal Officer | OLE |
| Route Node: OrganizationHierarchy | | | | |
| | Required | Action Details At Role Member Level | Granted to Roles | Inherited |
| | No | Yes | OLE-SYS Organization Reviewer | OLE |
| Route Node: SubFund | | | | |
| | Required | Action Details At Role Member Level | Granted to Roles | Inherited |
| | No | Yes | OLE-SYS Sub-Fund Reviewer | OLE |
| Route Node: Award | | | | |
| | Required | Action Details At Role Member Level | Granted to Roles | Inherited |
| | No | No | | OLE |
| Route Node: Chart | | | | |
| | Required | Action Details At Role Member Level | Granted to Roles | Inherited |
| | Yes | No | OLE-SYS University Chart Manager OLE-SYS Chart Manager | OLE |
| Split Node: HasDepositAccount | | | | |
| | Route Node: DepositAccount | | | |
| | Required | Action Details At Role Member Level | Granted to Roles | Inherited |
| | No | No | OLE-SELECT OLE Prepayment | No |

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

Workflow / Responsibilities tab definition

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

Rule Attribute



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

Technical considerations for a Rule Attribute are:

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

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

Define what data is collected on a rule.

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

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

Can have multiple GUI fields defined in a single attribute.

Statistics

Admin > Workflow Admin > Workflow Statistics

Workflow Statistics

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

Date Range

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

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

Workflow Attribute

Admin > Workflow Admin > Workflow Attribute > Rule Attribute Lookup

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

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

Rule Attribute Lookup Backdoor Id admin is in use * required field

Name:

Id:

Class Name:

Application ID:

Type:

15 items retrieved, displaying all items.

| Id | Name | Class Name | Type | Application ID |
|------|---|--|------------------------|----------------|
| 1000 | RuleRoutingAttribute | org.kuali.rice.kew.rule.RuleRoutingAttribute | RuleAttribute | |
| 1003 | NotificationCustomActionListAttribute | org.kuali.rice.ken.kew.NotificationCustomActionListAttribute | ActionListAttribute | |
| 1004 | NotificationChannelSearchableAttribute | org.kuali.rice.kew.docsearch.xml.StandardGenericXMLSearchableAttribute | SearchableXmlAttribute | |
| 1005 | NotificationPrioritySearchableAttribute | org.kuali.rice.kew.docsearch.xml.StandardGenericXMLSearchableAttribute | SearchableXmlAttribute | |

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

Rule Attribute hide

Id: 1000

Name: RuleRoutingAttribute

Label: Rule Routing Attribute


Description: Rule Routing Attribute

Class Name: org.kuali.rice.kew.rule.RuleRoutingAttribute

Application ID:

Type: Rule Attribute

XML Configuration:

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

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

XML Import

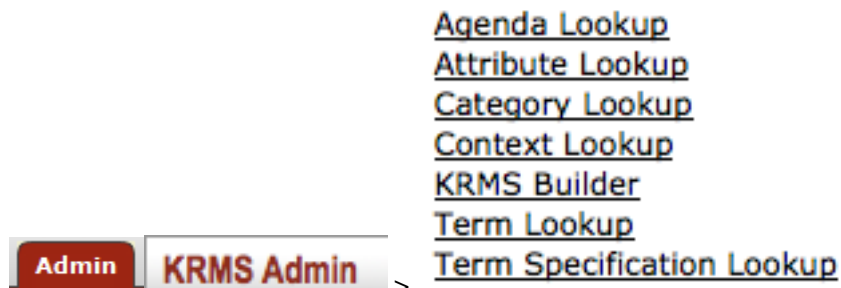
Admin > **Workflow Admin** > XML Import > **Ingester**

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

Ingestor

| | | |
|--|----------------------|-----------|
| XML File: | <input type="text"/> | Browse... |
| XML File: | <input type="text"/> | Browse... |
| XML File: | <input type="text"/> | Browse... |
| XML File: | <input type="text"/> | Browse... |
| XML File: | <input type="text"/> | Browse... |
| XML File: | <input type="text"/> | Browse... |
| XML File: | <input type="text"/> | Browse... |
| XML File: | <input type="text"/> | Browse... |
| XML File: | <input type="text"/> | Browse... |
| XML File: | <input type="text"/> | Browse... |
| <input type="button" value="upload xml data"/> | | |

Chapter 6. KRMS Administrative Documents



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

Tip

A [presentation about KRMS rules](#) was done on December 4th, 2014. This presentation covers the background, an introduction to and definitions for KRMS, and then dives deeper into the functionality, architecture, and execution of rules in KRMS. The presentation and its slides, booklet, and a link to GitHub are available from the [Rice Developer Sessions](#) wiki page.

Note - the presentation gets very technical in the second half.

Agenda Lookup



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

Tip

Copy rules to save time and typing.

Document Layout

The screenshot shows the Agenda Editor interface. At the top, there is a breadcrumb trail: Home > Agenda Editor >. Below this, the page title is "Agenda Editor". To the right, there are two rows of metadata: "Document Number: 3617" and "Document Status: INITIATED"; "Initiator Network Id: ole-khuntley" and "Creation Timestamp: 03:40 PM 08/30/2013".

The main content area is divided into two tabs: "Agenda" and "Rules".

The "Agenda" tab is active and contains the following fields:

- * Namespace: A dropdown menu with "OLE" selected.
- * Name: A text input field with the placeholder "Enter Agenda Name" and a "size 100" label below it.
- * Context: A text input field with the placeholder "Enter or Lookup Context Name" and a search icon to its right.
- Active: A checked checkbox.

The "Rules" tab is also visible and contains a toolbar with the following buttons:

- add rule
- edit rule
- Move: [left, right, up, down]
- cut
- paste
- delete
- refresh

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


Agenda Tab

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

This is a close-up view of the "Agenda" tab form. It shows the following fields:

- * Namespace: A dropdown menu with "OLE" selected.
- * Name: A text input field with the placeholder "Enter Agenda Name" and a "size 100" label below it.
- * Context: A text input field with the placeholder "Enter or Lookup Context Name" and a search icon to its right.
- Active: A checked checkbox.

Agenda tab definition

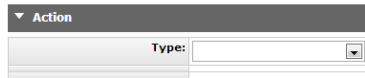
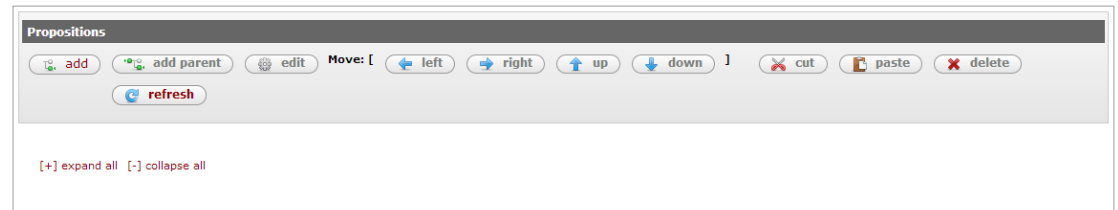
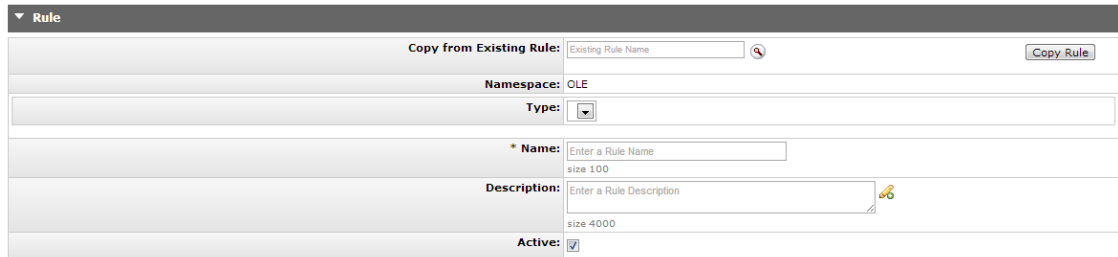
| Title | Description |
|-----------|--|
| Namespace | Required. The Namespace to which this Agenda will belong. |
| Name | Required. The name of the Agenda. This is a unique identifier and must be unique to the namespace selected. |
| Context | Required. A collection of agendas, rules, terms, term specifications.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

Rules tab

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





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




Rule

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

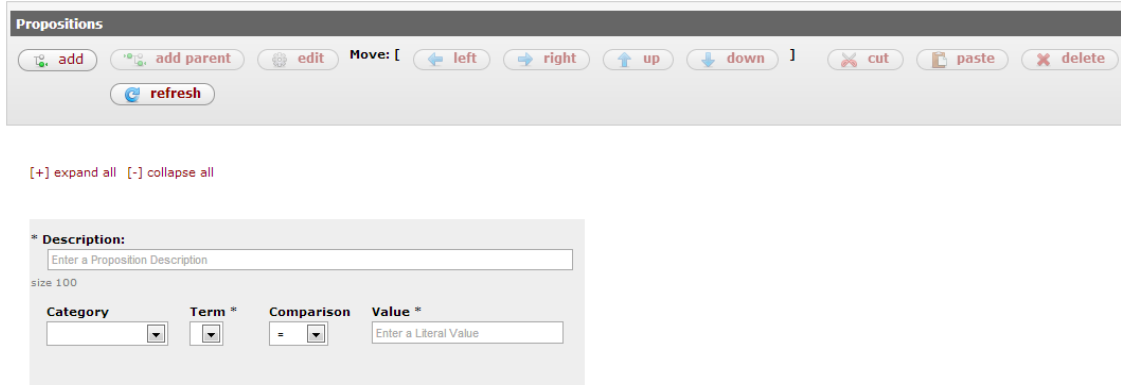
Rule tab definition

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

Add Propositions

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

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



Give the proposition a **Description**.

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

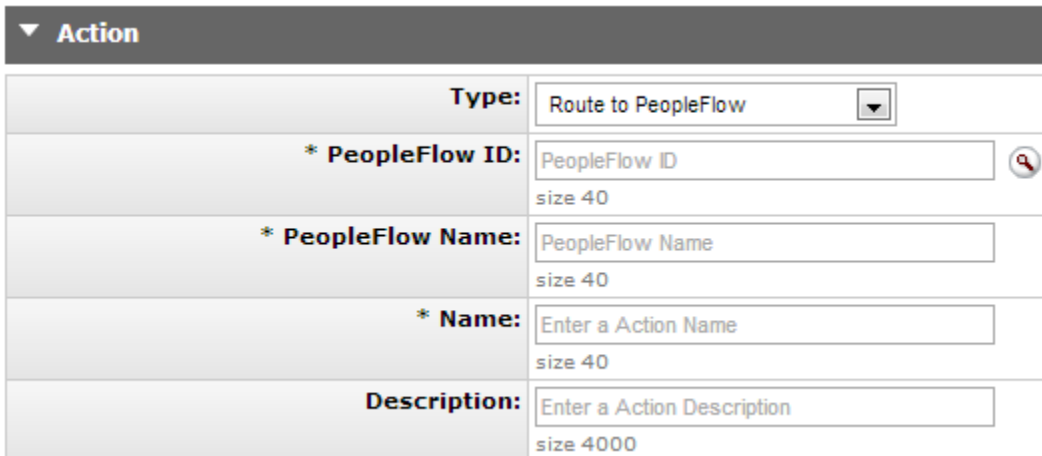
Add Action

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

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

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

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

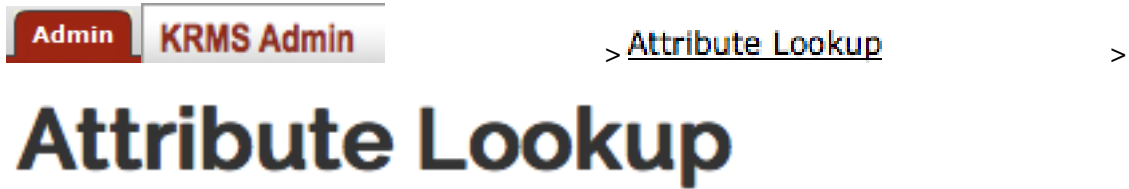


| Action | |
|---------------------------|---|
| Type: | Route to PeopleFlow |
| * PeopleFlow ID: | PeopleFlow ID size 40 |
| * PeopleFlow Name: | PeopleFlow Name size 40 |
| * Name: | Enter a Action Name size 40 |
| Description: | Enter a Action Description size 4000 |

Click **add rule** to add this rule to the agenda.

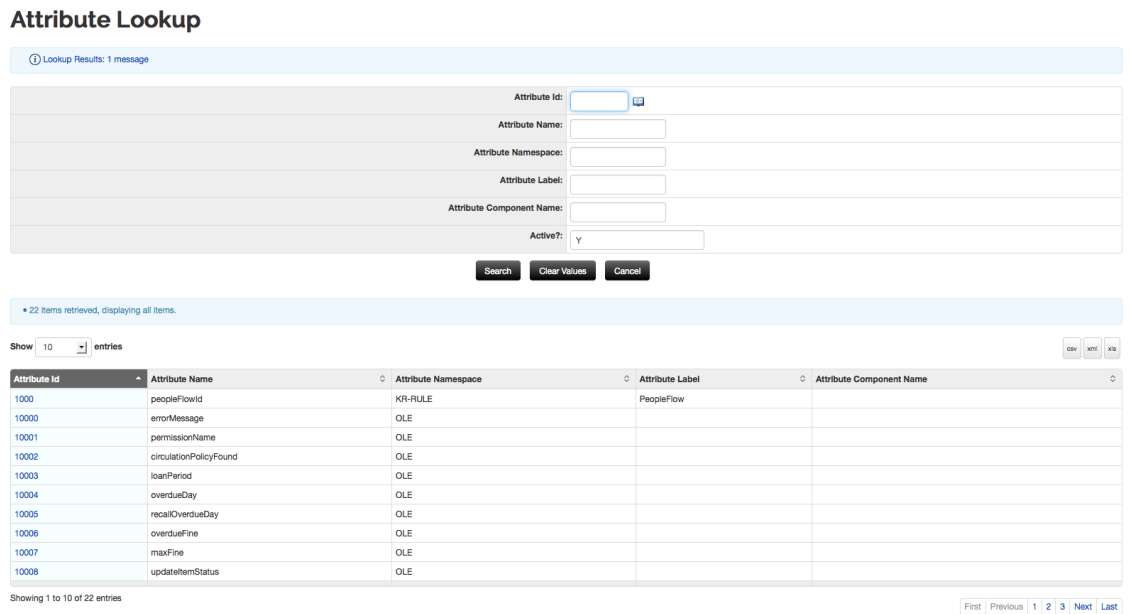
Continue to add as many rules as necessary for the agenda. Once complete click **submit**

Attribute Lookup



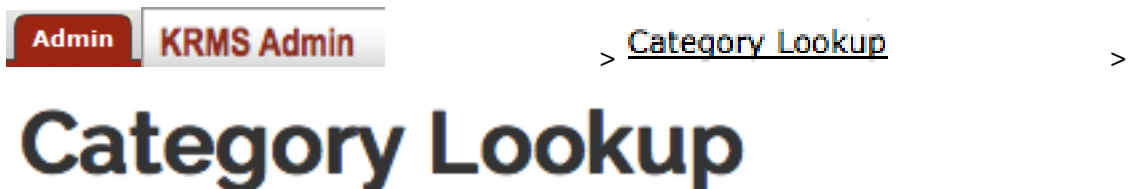
The Attribute lookup allows users to search for attributes used within KRMS rules. These are maintained by a system administrator.

Document Layout



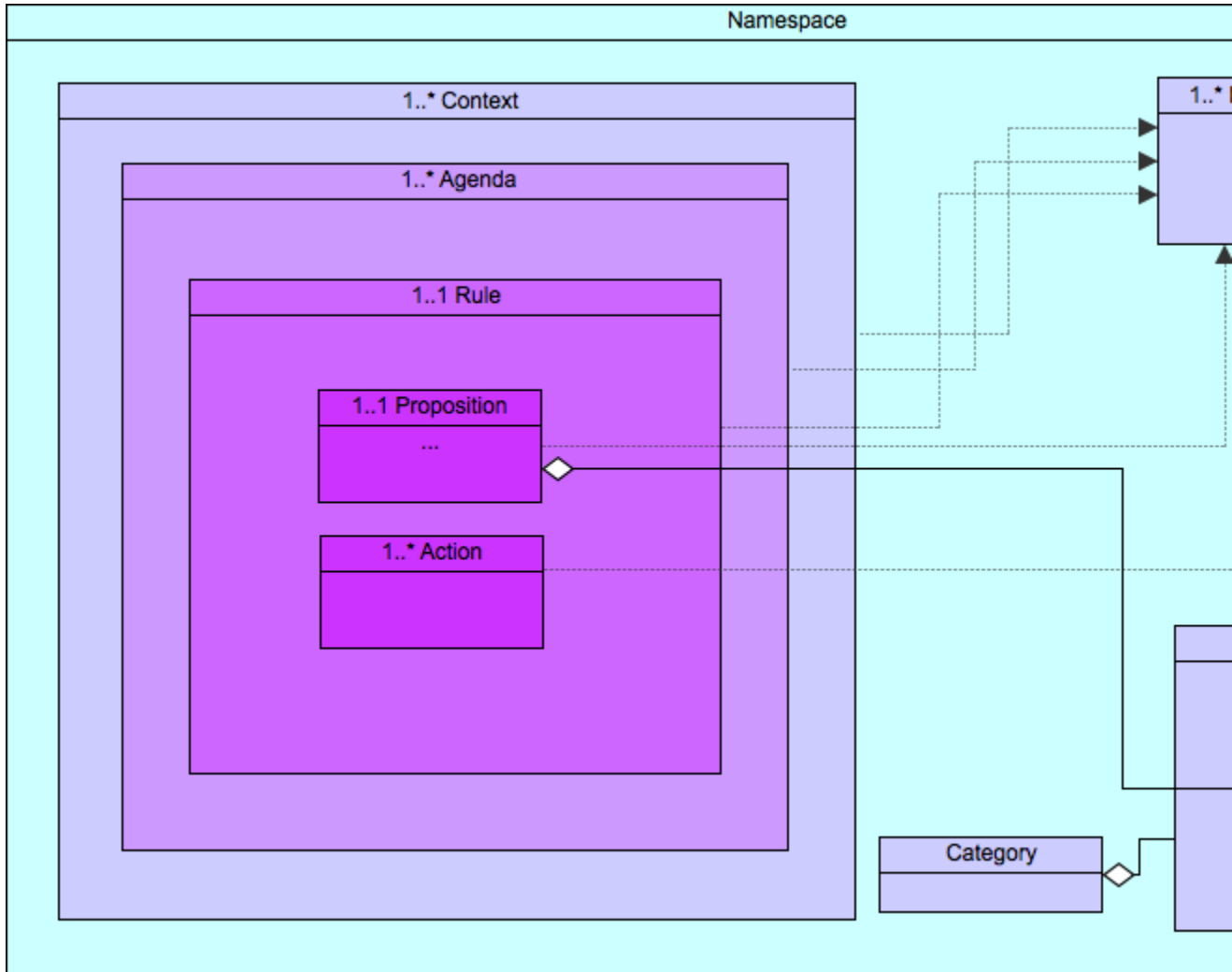
As a function of OLE, you may search for attributes. Execute a blank search to review all of them.

Category Lookup



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

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



Document Layout

Category Lookup

① Lookup Results: 1 message

Namespace:

Name:

• 2 items retrieved, displaying all items.

Show entries

| Namespace | Name |
|-----------|--------------|
| OLE | OLE_CATEGORY |
| OLE | licenses |

Context Lookup



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

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

Document Layout

Context Maintenance

Document Number: 4308 Document Status: INITIATED
Initiator Network Id: admin Creation Timestamp: 10:18 AM 09/04/2013

[expand all](#) [collapse all](#)
* indicates required field

Document Overview

| | |
|---|--|
| * Description: <input type="text"/> | Explanation: <input type="text"/> |
| Organization Document Number: <input type="text"/> | |

Context

| | Old | New |
|---------------------|----------------|----------------------|
| Id: | 10001 | 10001 |
| Name: | LICENSE_CONTXT | LICENSE_CONTXT |
| Namespace: | OLE | <input type="text"/> |
| Type: | | <input type="text"/> |
| Description: | | <input type="text"/> |
| Active: | true | <input type="text"/> |

Notes and Attachments (0)

Ad Hoc Recipients

Route Log

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

Context tab definition

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

KRMS Builder



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

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

Krms Builder

Krms File Upload: No file selected.

Term Lookup



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

Note

See the diagram under [Category](#) for a visual representation of the relation between terms, term specifications, and categories.

Document Layout

Term

Document Number: 4947 Document Status: INITIATED
 Initiator Network Id: admin Creation Timestamp: 04:49 PM 03/11/2014

* Indicates required field

Term

Description: ItemDamagedStatus

* Namespace:

* Specification ID: 10022

Name: ItemDamagedStatus

Value Class: java.lang.boolean

Specification Description: ItemDamagedStatus

Categories

Show 10 entries

| ID | Namespace | Name |
|----|-----------|--------------|
| 1 | OLE | OLE_CATEGORY |

Showing 1 to 1 of 1 entries

[Term Parameters](#)

Term Specification Lookup

Admin **KRMS Admin** > Term Specification Lookup >

Term Specification Lookup

Term Specification

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

Note

See the diagram under [Category](#) for a visual representation of the relation between terms, term specifications, and categories.

Document Layout

Term Specification

Document Number: 4962 Document Status: INITIATED
 Initiator Network Id: admin Creation Timestamp: 05:07 PM 03/11/2014

* Indicates required field

Term Specification

| | |
|--------------|----------------------|
| ID: | 10022 |
| * Namespace: | <input type="text"/> |
| * Name: | ItemDamagedStatus |
| * Data Type: | java.lang.boolean |
| Description: | ItemDamagedStatus |
| Active?: | true |

Contexts

[show inactive](#)

[Lookup/Add Multiple Lines](#)

Show 10 entries

ctrl xtl xls

| * Context Id | * Context Namespace | Context Name | Description | Actions |
|----------------------|----------------------|--------------|-------------|---------|
| <input type="text"/> | <input type="text"/> | | | add |

Showing 0 to 0 of 0 entries

First Previous 1 Next Last

Categories

[Lookup/Add Multiple Lines](#)

Show 10 entries

ctrl xtl xls

| * ID | * Namespace | Name | Actions |
|----------------------|----------------------|--------------|---------|
| <input type="text"/> | <input type="text"/> | | add |
| 1 | | OLE_CATEGORY | delete |

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

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

Chapter 7. System Administration Documents



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

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

Note

Learn more about KIM functions in the video [KIM functions \(roles, permissions, responsibilities\)](#).

Menu Access to KIM Functions

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

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

Basic KIM Concepts

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

KIM Permissions, Responsibilities, and Roles

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

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

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

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

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

KIM Groups

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

Routing & Identity Management Document Type Hierarchy Tool

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

Group



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

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

Document Layout

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

| | | |
|----------------|-------------------------|-------------------------------------|
| Group ? | Doc Nbr: 3089 | Status: INITIATED |
| | Initiator: admin | Created: 03:08 PM 06/14/2013 |

* required field

Document Overview ▼ hide

Document Overview

* **Description:**

Organization Document Number:

Explanation:

Overview ▼ hide

Group Id: 10000

* **Group Namespace:**

Active?:

Type Name: Default

* **Group Name:**

Group Description:

Assignees ▼ hide

Select a Group Namespace to determine if you have the appropriate permission to add members to this group

Add Member:

| Add: | * Type Code | * Member Identifier | Name | Active From Dt | Active To Dt | Actions |
|------------------------------------|-------------|----------------------|----------------------|----------------------|----------------------|------------------------------------|
| <input type="button" value="add"/> | Principal | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

Members:

| * Type Code | * Member Identifier | Namespace | Name | Full Name | Active From Dt | Active To Dt | Actions |
|-------------|---------------------|-----------|------|-----------|----------------|--------------|---------|
| | | | | | | | |

Ad Hoc Recipients ▶ show

Route Log ▶ show

Overview Tab

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


Overview ▼ hide


| | |
|---|--|
| Group Id: 10000 | Type Name: Default |
| * Group Namespace: <input type="text"/> | * Group Name: <input type="text"/> |
| Active?: <input checked="" type="checkbox"/> | Group Description: <input type="text"/> |

Overview tab definition

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

Type Name

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

Kim Type Lookup 


| | |
|--------------------------|--|
| Namespace Code: | <input type="text"/> |
| Type Name: | <input type="text"/> |
| Type Identifier: | <input type="text"/> |
| Active Indicator: | <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both |

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

KIM Type Lookup definition

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

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

Kim Type Lookup  * required field

| | |
|--------------------------|--|
| Namespace Code: | <input type="text"/> |
| Type Name: | <input type="text"/> |
| Type Identifier: | <input type="text"/> |
| Active Indicator: | <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both |

2 items found. Please refine your search criteria to narrow down your search.
 2 items retrieved, displaying all items.

| Return Value | Namespace Code | Type Name | Type Identifier | Active Indicator |
|------------------------------|----------------|--------------------|-----------------|------------------|
| return value | KUALI | Default | 1 | Yes |
| return value | KFS-COA | Organization Group | 68 | Yes |

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

Definitions Tab

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


Attributes ▼ hide

| | |
|---|--|
| * Chart Code <input type="text"/>  | * Organization Code <input type="text"/>  |
|---|--|

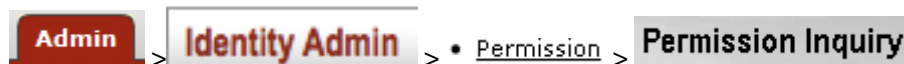
Assignees Tab

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

Assignees tab definition

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

Permission



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

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

Note

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

Permission Lookup create new
* required field

| | |
|--|--|
| Template Namespace: | <input type="text"/> |
| Template Name: | <input type="text"/> |
| Permission Namespace: | <input type="text"/> |
| Permission Name: | <input type="text"/> |
| Role Namespace: | <input type="text"/> |
| Role Name: | <input type="text"/> |
| Principal Name: | <input type="text"/> |
| Group Namespace: | <input type="text"/> |
| Group Name: | <input type="text"/> |
| Attribute Value: | <input type="text"/> |
| Template Id: | <input type="text"/> |
| Active Indicator: | <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both |
| <input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/> | |

Permission Lookup search criteria

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

31 items retrieved, displaying all items.

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

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

Permission Lookup results fields

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

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

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

Permission Inquiry expand all collapse all

Permission Attributes hide

| | |
|--------------------------------|---|
| Template Namespace: | KFS-SYS - Financial System |
| Template Name: | Claim Electronic Payment |
| Permission Namespace: | KFS-SYS - Financial System |
| Permission Name: | Claim Electronic Payment |
| Permission Description: | Allows access to the Electronic Fund Transfer interface for the claiming of electronic funds. |

Permission Detail Values hide

Permission Assigned Roles hide

hide **Assigned Roles(KFS-SYS - Financial System-Treasury Manager-Default)**

| | | | |
|------------------------|--|-------------------|----------------------------------|
| Namespace: | KFS-SYS - Financial System | Role Name: | Treasury Manager |
| Role Type Name: | Default | | |

close

Document Layout

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

| | | | |
|----------------------------------|--|---------------------------|-------------------------------------|
| Permission ? | | Doc Nbr: 3297 | Status: INITIATED |
| | | Initiator: amdload | Created: 09:09 PM 09/06/2009 |

[expand all](#) | [collapse all](#)
* required field

Document Overview hide

Document Overview

* **Description:**

Org. Doc. #:

Explanation:

Permission Info hide

New

Permission Identifier: 10001

* **Template Id:**

* **Permission Namespace:**

* **Permission Name:**

Permission Description:

* **Active Indicator:**

Permission Details hide

New

Permission Details:

Notes and Attachments (0) show

Ad Hoc Recipients show

Route Log show

Permission Info Tab

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

Permission Info hide

New

Permission Identifier: 10005

* **Template Id:**

* **Permission Namespace:**

* **Permission Name:**

Permission Description:

* **Active Indicator:**

Permission Info tab definition

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

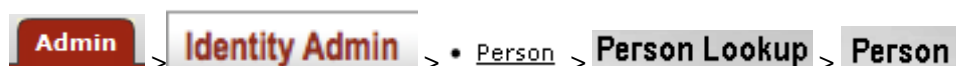
Permission Details Tab

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

Permission Details tab definition

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

Person



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

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

Note

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

Document Layout

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

| | | |
|-----------------------|-------------------------|------------------------------|
| Person ? | Doc Nbr: 3496 | Status: INITIATED |
| | Initiator: gle-khuntlev | Created: 02:34 PM 06/14/2013 |

* required field

Document Overview ▼ hide

Document Overview

| | | | |
|-------------------------------|----------------------|--------------|----------------------|
| * Description: | <input type="text"/> | Explanation: | <input type="text"/> |
| Organization Document Number: | <input type="text"/> | | |

Overview ▼ hide

| | | | |
|-------------------|----|---------------|-----|
| Entity Id: | 1 | Principal Id: | 1 |
| * Principal Name: | kr | Active: | Yes |

Affiliations

| * Affiliation Type | * Campus Code | Default | Actions |
|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

Contact ▼ hide

Names

| Name Code | Name Prefix | * First Name | * Last Name | Name Suffix | Default | Active | Actions |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

Addresses

| Address Type | Line 1 | Line 2 | Line 3 | City | State/Province | Postal Code | Country | Default | Active | Actions |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

Phone Numbers

| Phone Type | Phone Number | Extension | Country | Default | Active | Actions |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

Email Addresses

| Email | Type | Default | Active | Actions |
|----------------------|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

Privacy Preferences ▼ hide

| | | | |
|--------------------|----|-------------------|----|
| Suppress Name: | No | Suppress Address: | No |
| Suppress Personal: | No | Suppress Email: | No |
| Suppress Phone: | No | | |

Membership ▼ hide

Groups ▼ hide

| Group | Namespace Code | Name | Type | Active From Date | Active To Date | Actions |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

Roles ▼ hide

| Role | Namespace Code | Name | Type | Active From Date | Active To Date | Actions |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |
| 1 | 90 | KR-SYS | System User | Default | | |

Delegations ▼ hide

| Role Member | Active From Date | Active To Date | Delegation Type Code | Actions |
|----------------------|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

Ad Hoc Recipients ▶ show

Route Log ▶ show

Overview Tab

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

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

Overview ▼ hide

| | | | |
|-------------------|----|---------------|-----|
| Entity Id: | 1 | Principal Id: | 1 |
| * Principal Name: | kr | Active: | Yes |

Affiliations

| * Affiliation Type | * Campus Code | Default | Actions |
|----------------------|----------------------|----------------------|------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |

Overview Section

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

Overview section Definitions

| Title | Description |
|-------|-------------|
| | |

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

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

Affiliations section definition

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

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

The screenshot shows a form titled "Employment Information" with several input fields and a button. The fields are: "Add:" (with a dropdown arrow), "Employment Id" (text input), "Primary" (checkbox), "Employee Status" (dropdown menu), "Employee Type" (dropdown menu), "Base Salary Amount" (text input), and "Primary Department Code" (text input). There is a red "Add" button on the right side of the form.

Employment Information fields definition

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

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

Contact Tab

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

Contact
▼ hide

| Names | | | | | | | | | |
|-------|-----------|-------------|--------------|-------------|-------------|--------------------------|-------------------------------------|------------------------------------|--|
| Add: | Name Code | Name Prefix | * First Name | * Last Name | Name Suffix | Default | Active | Actions | |
| Other | | | | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="button" value="add"/> | |

| Addresses | | | | | | | | | | | |
|-----------|--------------|--------|--------|--------|------|----------------|-------------|---------|--------------------------|-------------------------------------|------------------------------------|
| Add: | Address Type | Line 1 | Line 2 | Line 3 | City | State/Province | Postal Code | Country | Default | Active | Actions |
| Home | | | | | | | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="button" value="add"/> |

| Phone Numbers | | | | | | | | |
|---------------|------------|--------------|-----------|---------|--|--------------------------|-------------------------------------|------------------------------------|
| Add: | Phone Type | Phone Number | Extension | Country | | Default | Active | Actions |
| Home | | | | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="button" value="add"/> |

| Email Addresses | | | | | |
|-----------------|-------|------|--------------------------|-------------------------------------|------------------------------------|
| Add: | Email | Type | Default | Active | Actions |
| | | Home | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="button" value="add"/> |

Names Section

| Names | | | | | | | | | |
|-------|-----------|-------------|--------------|-------------|-------------|--------------------------|-------------------------------------|------------------------------------|--|
| Add: | Name Code | Name Prefix | * First Name | * Last Name | Name Suffix | Default | Active | Actions | |
| Other | | | | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="button" value="add"/> | |

Names section definition

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

Addresses Section

| Addresses | | | | | | | | | | | |
|-----------|--------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|--------------------------|-------------------------------------|------------------------------------|
| | Address Type | Line 1 | Line 2 | Line 3 | City | State/Province | Postal Code | Country | Default | Active | Actions |
| Add: | Home ▾ | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="button" value="add"/> |

Addresses section definition

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

Phone Numbers Section

| Phone Numbers | | | | | | | |
|---------------|------------|----------------------|----------------------|----------------------|--------------------------|-------------------------------------|------------------------------------|
| | Phone Type | Phone Number | Extension | Country | Default | Active | Actions |
| Add: | Home ▾ | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="button" value="add"/> |

Phone Numbers section definition

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

Email Addresses Section

| Email Addresses | | | | | |
|-----------------|----------------------|--------|-------------------------------------|-------------------------------------|---------------------------------------|
| | Email | Type | Default | Active | Actions |
| Add: | <input type="text"/> | Home ▾ | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="button" value="add"/> |
| 1 | test@email.edu | Work ▾ | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="button" value="delete"/> |

Email Address section definition

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

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

Privacy Preferences Tab

Note

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

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

| Privacy Preferences | |
|---------------------|--------------------------|
| Suppress Name: | <input type="checkbox"/> |
| Suppress Personal: | <input type="checkbox"/> |
| Suppress Phone: | <input type="checkbox"/> |
| Suppress Address: | <input type="checkbox"/> |
| Suppress Email: | <input type="checkbox"/> |

Privacy Preferences tab definition

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

Membership Tab


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

| Membership | | | | | | | |
|--------------------|----------------------|----------------------|----------------------|----------------------|------------------------------------|----------------------|------------------------------------|
| ▼ hide Groups | | | | | | | |
| | Group | Namespace Code | Name | Type | Active From Date | Active To Date | Actions |
| Add: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |
| ▼ hide Roles | | | | | | | |
| | Role | Namespace Code | Name | Type | Active From Date | Active To Date | Actions |
| Add: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> |
| ▼ hide Delegations | | | | | | | |
| | Role Member | Active From Date | Active To Date | Delegation Type Code | Actions | | |
| Add: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="add"/> | | |

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


Groups Section

Groups section definition

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

Roles Section

Roles section definition

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


Note

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

Delegations Section

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

Delegations section definition

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

Process Overview

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

Note

In OLE 1.6 after clicking **Submit** and receiving the system response "Document was successfully submitted", if you click **Close** OLE will ask "Would you like to save this document before you close it?" Select **No**. If you select Yes, the system will give you a stack trace error. Your changes will be saved in the system.

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

See [OLE-7432](#) for additional details.

Business Rules

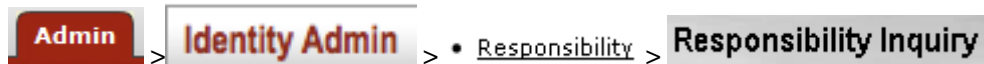
- A person must have at least one affiliation.
- Each faculty or staff affiliation must have at least one Employment Information record associated with it.

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

Routing

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

Responsibility



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

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

Note

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

| | |
|---------------------------|----------------------|
| Template Namespace: | <input type="text"/> |
| Template Name: | <input type="text"/> |
| Responsibility Namespace: | <input type="text"/> |
| Responsibility Name: | <input type="text"/> |
| Role Namespace: | <input type="text"/> |
| Role Name: | <input type="text"/> |
| Principal Name: | <input type="text"/> |
| Group Namespace: | <input type="text"/> |
| Group Name: | <input type="text"/> |
| Attribute Value: | <input type="text"/> |

Responsibility Lookup search criteria

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

8 items retrieved, displaying all items.

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

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

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

Responsibility Lookup results fields

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

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

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

Responsibility Inquiry expand all collapse all

Responsibility Attributes hide

Template Namespace: [KR-WKFLW - Workflow](#)

Template Name: [Review](#)

Responsibility Namespace: [OLE-PURAP - Purchasing/Accounts Payable](#)

Responsibility Name: [Review REQS Initiator](#)

Responsibility Detail Values hide

▼ hide Detail Values (documentTypeName - OLE_REQS)

| | |
|----------------------------------|---------------------------|
| Attribute Name: documentTypeName | Attribute Value: OLE_REQS |
|----------------------------------|---------------------------|

▼ hide Detail Values (routeNodeName - Initiator)

| | |
|-------------------------------|----------------------------|
| Attribute Name: routeNodeName | Attribute Value: Initiator |
|-------------------------------|----------------------------|

▼ hide Detail Values (required - FALSE)

| | |
|--------------------------|------------------------|
| Attribute Name: required | Attribute Value: FALSE |
|--------------------------|------------------------|

▼ hide Detail Values (actionDetailsAtRoleMemberLevel - FALSE)

| | |
|--|------------------------|
| Attribute Name: actionDetailsAtRoleMemberLevel | Attribute Value: FALSE |
|--|------------------------|

Responsibility Assigned Roles hide

▼ hide Assigned Roles (KR-WKFLW - Workflow - Initiator - Derived Role: Route Log)

| | | |
|--|--------------------------------------|---|
| Namespace: KR-WKFLW - Workflow | Role Name: Initiator | Role Type Name: Derived Role: Route Log |
|--|--------------------------------------|---|

close

Document Layout

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

| | | | |
|---|--|----------------------------|-------------------------------------|
| Review Responsibility ? | | Doc Nbr: 3298 | Status: INITIATED |
| | | Initiator: amdelaad | Created: 09:20 PM 09/06/2009 |

[expand all](#) | [collapse all](#)
* required field

Document Overview ▼ hide

Document Overview

* **Description:**

Org. Doc. #:

Explanation:

Responsibility Info ▼ hide

New

Responsibility Identifier: 10001

* **Responsibility Namespace:**

* **Responsibility Name:**

Responsibility Description:

* **Active Indicator:**

Responsibility Details ▼ hide

New

* **Document Type Name:**

* **Route Node Name:**

* **Action Details At Role Member Level:**

* **Required:**

Qualifier Resolver Provided Identifier:

Notes and Attachments (0) ▶ show

Ad Hoc Recipients ▶ show

Route Log ▶ show

Responsibility Info Tab

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

Responsibility Info ▼ hide

New

Responsibility Identifier: 10000

* **Responsibility Namespace:**

* **Responsibility Name:**

Responsibility Description:

* **Active Indicator:**


Responsibility Info tab definition

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

Responsibility Details Tab

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

Responsibility Details tab definition

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

Role



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

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

Note

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

Document Layout

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

The screenshot shows a web interface for a 'Role' document. At the top, there are fields for 'Doc Nbr: 3267', 'Status: INITIATED', 'Initiator: amdelgad', and 'Created: 02:33 PM 09/12/2009'. Below this are 'expand all' and 'collapse all' buttons, and a note '* required field'. The main content is organized into several tabs, each with a 'hide' button:

- Document Overview**: Contains fields for '* Description:', 'Org. Doc. #:', and 'Explanation:'.
- Overview**: Contains fields for 'Role: 10000', 'Namespace:', 'Active?: ', 'Type Name: Default', 'Role Name:', and 'Role Description:'.
- Permissions**: Features an 'Add Permission ID:' field with a search icon and an 'add' button. Below is a table with columns: '* Permission Namespace', 'Permission Identifier', 'Permission Name', 'Permission Detail Values', 'Active Indicator', and 'Actions'.
- Responsibilities**: Features an 'Add Responsibility ID:' field with a search icon and an 'add' button. Below is a table with columns: 'Responsibility Namespace', 'Responsibility Identifier', 'Responsibility Name', 'Responsibility Detail Values', 'Active Indicator', and 'Actions'.
- Assignees**: Features an 'Add:' field with a search icon and a 'Principal' dropdown. Below is a table with columns: 'Type Code', 'Member Identifier', 'Namespace Cd', 'Name', 'Active From Dt', 'Active To Dt', and 'Actions'.
- Delegations**: Features an 'Add:' field with a search icon and a 'Principal' dropdown. Below is a table with columns: 'Role Member', 'Member Type Code', 'Member Identifier', 'Member Namespace Code', 'Member Name', 'Active From Date', 'Active To Date', 'Delegation Type Code', and 'Actions'.
- Ad Hoc Recipients**: Features a 'show' button.
- Route Log**: Features a 'show' button.

At the bottom of the form are buttons for 'submit', 'save', 'close', and 'cancel'.

Overview Tab

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

The screenshot shows the 'Overview' tab of the Role document. It contains the following fields:

- Role:** 10000
- Namespace:** (dropdown menu)
- Active?:**
- Type Name:** Default
- Role Name:** (text input)
- Role Description:** (text input)

Overview tab definition

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

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

Creating New Roles

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

Note

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

Kim Type Lookup

Namespace Code:

Type Name:

Type Identifier:

Active Indicator: Yes No Both

Permissions Tab

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

Permissions ▼ hide

Add Permission ID:

| | * Permission Namespace | Permission Identifier | Permission Name | Permission Detail Values | Active Indicator | Actions |
|---|------------------------|-----------------------|-------------------------|--|------------------|---------------------------------------|
| 1 | KFS-FP | 193 | Modify Accounting Lines | Property Name : sourceAccountingLines.amount, Document Type Name : DV, Route Node Name : Tax | Yes | <input type="button" value="delete"/> |

Permissions tab definition

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

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

Note

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

| | * Permission Namespace | Permission Identifier | Permission Name | Permission Detail Values | Active Indicator | Actions |
|---|------------------------|-----------------------|-------------------------|--|------------------|---------------------------------------|
| 1 | KFS-FP | 193 | Modify Accounting Lines | Property Name : sourceAccountingLines.amount, Document Type Name : DV, Route Node Name : Tax | Yes | <input type="button" value="delete"/> |

Permissions tab definition, continued


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

Responsibilities Tab

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

| Responsibility Namespace | Responsibility Identifier | Responsibility Name | Responsibility Detail Values | Active Indicator | Actions |
|--------------------------|---------------------------|---------------------|------------------------------|------------------|---------|
|--------------------------|---------------------------|---------------------|------------------------------|------------------|---------|

Responsibilities tab definition

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

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

Note

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

| | Responsibility Namespace | Responsibility Identifier | Responsibility Name | Responsibility Detail Values | Active Indicator | Actions |
|---|--------------------------|---------------------------|---------------------|---|------------------|---------------------------------------|
| 1 | KFS-SYS | 1 | Review | OrganizationHierarchy, KFS, true, false | Yes | <input type="button" value="delete"/> |

Responsibilities tab definition, continued

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

Assigning Action Detail Values

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

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

| Responsibility Action | | | | | |
|-----------------------|--------------------|-----------------|----------------------|--------------------------|--|
| Name | * Action Type Code | Priority Number | * Action Policy Code | Force Action | |
| All | ▼ | | ▼ | <input type="checkbox"/> | |

Responsibility Action subsection definition


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

Assignees Tab

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

| Assignees ▼ hide | | | | | | | | | |
|---|-------------|----------------------|--------------|------|----------------------|----------------------|--------------|----------------------|------------------------------------|
| | Type Code | Member Identifier | Namespace Cd | Name | Active From Dt | Active To Dt | * Chart Code | * Organization Code | Actions |
| Add: | Principal ▼ | <input type="text"/> | | | <input type="text"/> | <input type="text"/> | ▼ | <input type="text"/> | <input type="button" value="add"/> |

Assignees tab definition

| Title | Description |
|-------------------|--|
| Type Code | Required. Role members can be principals (as defined on the Person document), groups or other roles. Select the type of member you want to add to this Role. |
| Member Identifier | <p>Required. Enter the ID of the member you want to add or use the lookup  to search for and select a valid value. The lookup directs you to the Principal, Group or Role lookup based on your Member Type Code selection.</p> <p>Note</p> <p>There is a reported bug that will not allow you to add anything other than a Principal. If you try to add a Role or a Group, the screen never finishes loading (OLE-6771).</p> |

| | |
|------------------|---|
| Namespace Cd | Display only. Identifies the namespace code associated with this role member. Note that only groups and roles will display a namespace code. |
| Name | Display only. Identifies the name of the member being assigned to this role. |
| Active From Date | Optional. Allows you to qualify this member's association with this role by date. Entering a from date will define the earliest date on which this member is a valid member of this role. |
| Active To Date | Optional. Allows you to deactivate a member's association with a role on a specific date. The date you enter defines the date the user is no longer a member of this role. Note You cannot delete or inactivate role members. To remove a member from a role, specify an active to date. |
| Actions | Click the Add button to add this member to the role. |

Note

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

Note

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



Delegations Tab

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

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

The screenshot shows a web interface for adding a delegation. It includes a 'hide' button and several input fields: 'Add:' with a checkbox and a search icon, 'Role Member' with a search icon, 'Member Type Code' with a dropdown menu (set to 'Principal'), 'Member Identifier' with a search icon, 'Member Namespace Code', 'Member Name', 'Active From Date' with a calendar icon, 'Active To Date' with a calendar icon, '* Chart Code' with a search icon, 'Delegation Type Code' with a dropdown menu, and an 'add' button.

Delegations tab definition

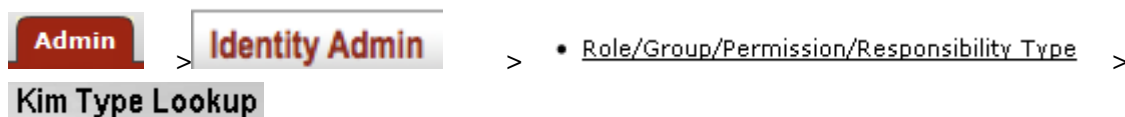
| Title | Description |
|-------------------|--|
| Role Member | Required. Use the lookup  to search for and return the member of this role you wish to create a delegate for. |
| Member Type Code | Required. Delegates may be principals (as defined on the Person document), groups or other roles. Select the type of delegate you want to add to this role. |
| Member Identifier | Required. Enter the ID that identifies the delegate you want to add or use the lookup  to search for and select a valid value. Note that the lookup |

| | |
|-----------------------|--|
| | will direct you to the Principal, Group or Role lookup based on your Member Type Code selection. |
| Member Namespace Code | Display only. Identifies the namespace associated with the selected delegate. Note that only delegations to groups or roles will display a member namespace code. |
| Member Name | Display only. Shows the name of the selected delegate. |
| Active From Date | Optional. If you want you can qualify this delegate's association with this role by date. Entering a from date will define the earliest date on which this delegate is a valid delegate for this role. |
| Active To Date | Optional. Allows you to deactivate a delegate's association with a role on a specific date. The date you enter defines the date on which the user is no longer a delegate for this role. Note You cannot delete or deactivate delegates. To remove a delegate from a role, enter an active to date. |
| Delegation Type Code | Required. Select 'Secondary' or 'Primary'. Note that this selection only applies to responsibilities associated with the role and indicates if the delegate will receive documents directly in their action list (Primary) or may choose to view documents in their action list using the secondary delegate list (Secondary). |
| Actions | Click the Add button to add this delegate to the role. |

Note

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

Role/Group/Permission/Responsibility Type



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

Document Layout

Kim Type Lookup * required field

| | |
|--|--|
| Namespace Code: | KR-NS - Nervous System |
| Type Name: | |
| Type Identifier: | |
| Active Indicator: | <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both |
| <input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/> | |

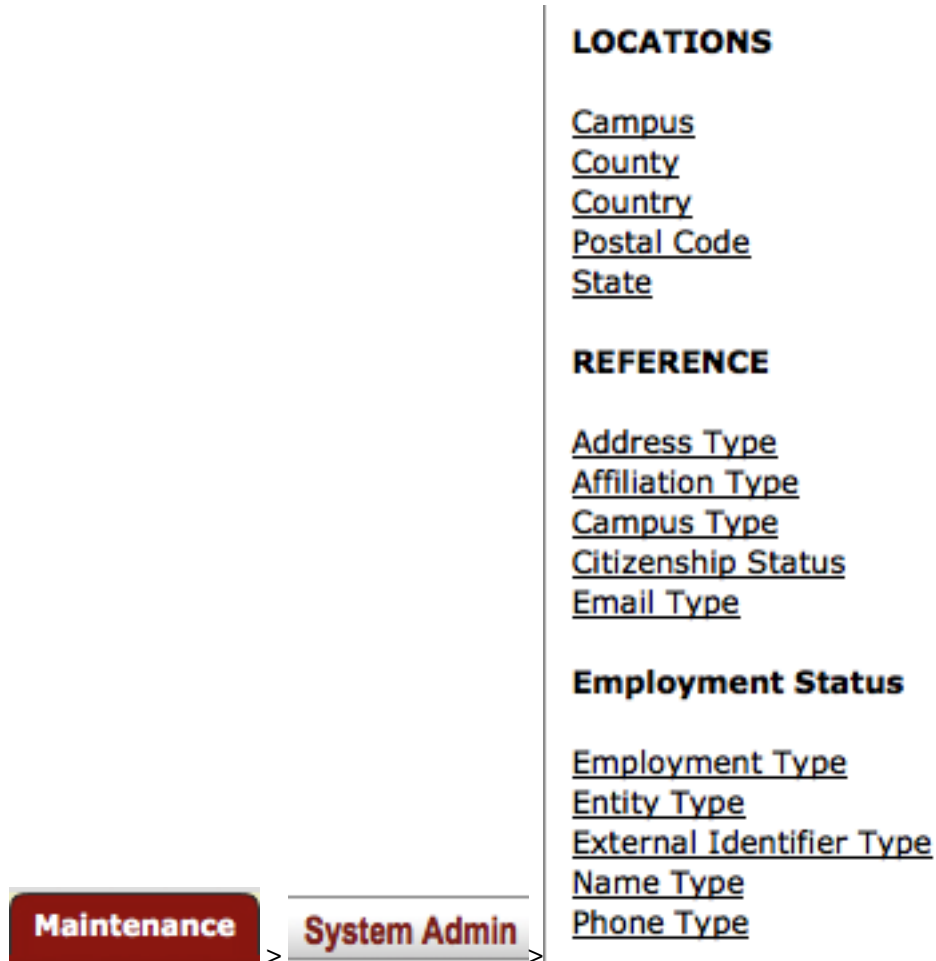
15 items retrieved, displaying all items.

| Namespace Code | Type Name | Type Identifier | Active Indicator |
|----------------|---|-----------------|------------------|
| KR-NS | Namespace or Component | 10 | Yes |
| KR-NS | Component Field | 11 | Yes |
| KR-NS | Namespace or Action | 12 | Yes |
| KR-NS | Button | 13 | Yes |
| KR-NS | Edit Mode & Document Type | 14 | Yes |
| KR-NS | Batch Feed or Job | 15 | Yes |
| KR-NS | Parameter | 16 | Yes |
| KR-NS | Canvas | 17 | Yes |
| KR-NS | Derived Role: Permission (Edit Document) | 48 | Yes |
| KR-NS | Document Type & Existing Records Only | 56 | Yes |
| KR-NS | Component Section | 57 | Yes |
| KR-NS | Document Type & Relationship to Note Author | 59 | Yes |
| KR-NS | Derived Role: Permission (Open Document) | 60 | Yes |
| KR-NS | Namespace | 67 | Yes |
| KR-NS | Document Type & Attachment Type | 9 | Yes |

Kim Type Lookup results definition

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

Chapter 8. System Admin Maintenance Documents



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

Campus



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

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

Document Layout

Edit Campus Tab

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

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

Edit Campus tab definition

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

Country



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

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

Document Layout

| | | |
|------------------------------|------------------------|------------------------------|
| CountryMaintenanceDocument ? | Doc Nbr: 5387 | Status: INITIATED |
| | Initiator: ole-khuntey | Created: 12:34 PM 06/19/2013 |

* required field

Document Overview

Document Overview

* Description:

Organization Document Number:

Explanation:

Edit Country

New

* Country Code:

* Country Name:

Alternate Country Code:

Active Indicator:

Notes and Attachments (0)

Ad Hoc Recipients

Route Log

Edit Country Tab

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

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

Edit Country tab definition

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

County



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

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

Document Layout

Edit Counties Tab

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

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

Edit Counties tab definition

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

Postal Code



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

Note

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

Document Layout

The screenshot shows the 'PostalCodeMaintenanceDocument' interface. At the top, there is a header bar with the document title and a help icon. To the right, a status bar displays 'Doc Nbr: 3273', 'Status: INITIATED', 'Initiator: amdeload', and 'Created: 03:43 PM 09/12/2009'. Below this, there are controls for 'expand all', 'collapse all', and a note '* required field'. The main content area is divided into several tabs: 'Document Overview' (with a 'hide' button), 'Edit Postal Codes' (with a 'hide' button), 'Notes and Attachments (0)' (with a 'show' button), 'Ad Hoc Recipients' (with a 'show' button), and 'Route Log' (with a 'show' button). The 'Edit Postal Codes' tab is active and contains a 'New' section with the following fields: '* Country Code:' (with a search icon), '* Postal Code:', '* State:' (with a search icon), 'Country Code:' (with a search icon), '* City Name:', and 'Active Indicator:' (with a checked checkbox). At the bottom of the form, there are buttons for 'submit', 'save', 'close', and 'cancel'.

Edit Postal Codes Tab

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

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

Edit Postal Codes tab definition

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

State



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

Document Layout

The screenshot shows a web interface for a State Maintenance Document. At the top, there is a header bar with the document ID 'StateMaintenanceDocument', document number '3275', status 'INITIATED', initiator 'amdelgad', and creation date '03:59 PM 09/12/2009'. Below this are several tabs: 'Document Overview', 'Edit States', 'Notes and Attachments (0)', 'Ad Hoc Recipients', and 'Route Log'. The 'Document Overview' tab is active, showing fields for 'Description', 'Org. Doc. #', and 'Explanation'. The 'Edit States' tab is also visible, showing a 'New' section with fields for 'Country Code', 'State Abbreviation', 'State Name', and 'Active Indicator'. At the bottom, there are buttons for 'submit', 'save', 'close', and 'cancel'.

Edit States Tab

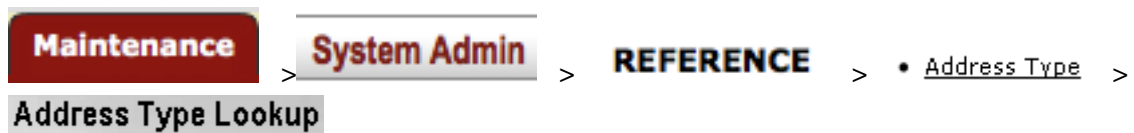
The State Maintenance document includes the **Edit States** tab.

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

Edit States tab definition

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

Address Type



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

Note

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

Document Layout

Address Type Lookup * required field

| | |
|--|--|
| Address Type Code: | <input type="text"/> |
| Address Type Name: | <input type="text"/> |
| Active Indicator: | <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both |
| <input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/> | |

3 items retrieved, displaying all items.

| Address Type Code | Address Type Name | Display Sort Code | Active Indicator |
|-------------------|-------------------|-------------------|------------------|
| HM | Home | b | Yes |
| OTH | Other | c | Yes |
| WRK | Work | a | Yes |

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

Address Type Lookup results definition

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

Affiliation Type

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

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

Note

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

Document Layout

Affiliation Type Lookup * required field

| | |
|--|--|
| Affiliation Type Code: | <input type="text"/> |
| Affiliation Type Name: | <input type="text"/> |
| Active Indicator: | <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both |
| <input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/> | |

4 items retrieved, displaying all items.

| Affiliation Type Code | Affiliation Type Name | Display Sort Code | Active Indicator |
|-----------------------|-----------------------|-------------------|------------------|
| AFLT | Affiliate | d | Yes |
| FCLTY | Faculty | b | Yes |
| STAFF | Staff | c | Yes |
| STDNT | Student | a | Yes |

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

Affiliation Type Lookup results definition

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

Campus Type



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

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

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

Note

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

Document Layout

CampusTypeMaintenanceDocument ?

| | |
|--------------------------------|-------------------------------------|
| Doc Nbr: 5395 | Status: INITIATED |
| Initiator: ole-khuntley | Created: 01:22 PM 06/19/2013 |

[expand all](#) | [collapse all](#)
 * required field

Document Overview
hide

| | |
|---|---|
| * Description: <input type="text"/> | Explanation: <div style="border: 1px solid gray; height: 40px;"></div> |
| Organization Document Number: <input type="text"/> | |

Edit Campus Type
hide

New

| | |
|---|----------------------|
| * Campus Type Code: <input type="text"/> | <input type="text"/> |
| * Campus Type Name: <input type="text"/> | <input type="text"/> |

Notes and Attachments (0)
show

Ad Hoc Recipients
show

Route Log
show

Edit Campus Type Tab

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

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

Edit Campus Type tab definition

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

Citizenship Status



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

Note

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

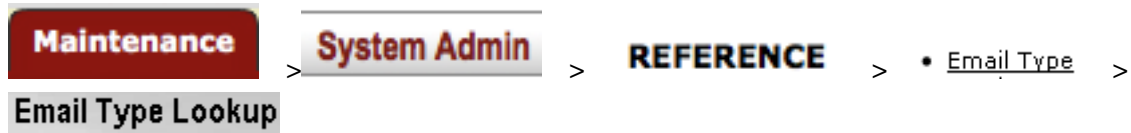
Document Layout

A screenshot of the 'Citizenship Status Lookup' search form. It includes fields for 'Citizenship Status Code', 'Citizenship Status Name', and 'Active Indicator' (with radio buttons for Yes, No, Both). There are 'search', 'clear', and 'cancel' buttons. Below the form, the message 'No values match this search.' is displayed.

Citizenship Status Lookup results definition

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

Email Type



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

Note

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

Document Layout

Email Type Lookup * required field

| | |
|--|--|
| Email Type Code: | <input type="text"/> |
| Email Type Name: | <input type="text"/> |
| Active Indicator: | <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both |
| <input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/> | |

3 items retrieved, displaying all items.

| Email Type Code | Email Type Name | Display Sort Code | Active Indicator |
|-----------------|-----------------|-------------------|------------------|
| HM | Home | b | Yes |
| OTH | Other | c | Yes |
| WRK | Work | a | Yes |

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

Email Type Code Lookup results definition

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

Employee Type



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

Note

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

Document Layout

Employee Type Lookup * required field

Employee Type Code:

Employee Type Name:

Active Indicator: Yes No Both

3 items retrieved, displaying all items.

| Employee Type Code | Employee Type Name | Display Sort Code | Active Indicator |
|--------------------|--------------------|-------------------|------------------|
| N | Non-Professional | 02 | Yes |
| O | Other | 99 | Yes |
| P | Professional | 01 | Yes |

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

Employee Type Lookup results definition

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

Entity Type



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

Note

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

Document Layout

Entity Type Lookup * required field

| | |
|--|--|
| Entity Type Code: | <input type="text"/> |
| Entity Type Name: | <input type="text"/> |
| Active Indicator: | <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both |
| <input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/> | |

2 items retrieved, displaying all items.

| Entity Type Code | Entity Type Name | Display Sort Code | Active Indicator |
|------------------|------------------|-------------------|------------------|
| PERSON | Person | 01 | Yes |
| SYSTEM | System | 02 | Yes |

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

Entity Type Lookup results definition

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

External Identifier Type



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

Note

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

Document Layout

External Identifier Type Lookup * required field

| | |
|--|--|
| External Identifier Type Code: | <input type="text"/> |
| External Identifier Type Name: | <input type="text"/> |
| Active Indicator: | <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both |
| <input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/> | |

One item retrieved.

| External Identifier Type Code | External Identifier Type Name | Display Sort Code | Active Indicator |
|-------------------------------|-------------------------------|-------------------|------------------|
| TAX | Tax ID | 03 | Yes |

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

External Identifier Lookup results definition

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

Name Type

Maintenance >
 System Admin >
 Employment Status >
 Name Type >
 Entity Name Type Lookup

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

Note

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

Document Layout

Entity Name Type Lookup * required field

Entity Name Type Code:

Entity Name Type Name:

Active Indicator: Yes No Both

3 items retrieved, displaying all items.

| Entity Name Type Code | Entity Name Type Name | Display Sort Code | Active Indicator |
|-----------------------|-----------------------|-------------------|------------------|
| OTH | Other | c | Yes |
| PRFR | Preferred | b | Yes |
| PRM | Primary | a | Yes |

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

Entity Name Type Lookup results definition

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

Phone Type

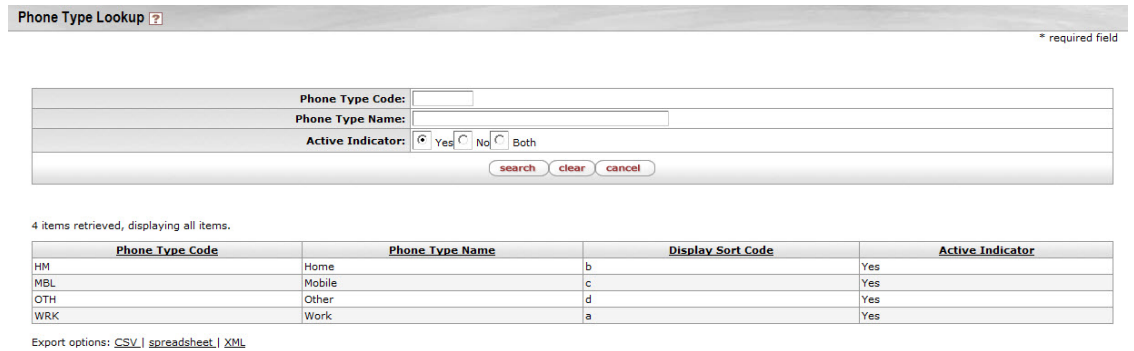


The Phone Type Lookup displays codes that identify various categories of phone numbers on the Person document.

Note

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

Document Layout



Phone Type Lookup results definition

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