OLE 0.3 Acquisitions Routing & User Roles: Reference Guide Default super-user: ole-khuntley open library environment Testing **Load Order Records** B: OLE_Acquisitions PreOrder Service Staff Upload ole-fermat Purchase Order Close (any user login can test webform) B: OLE Acquisitions University ole-fermat Purchase Web form **Financial** Ingest/Load (library Order Integrations/ Records website) Amendment* Payments & GL See also: Purchase Order **ACQUISITIONS** B: OLE_LOAD (future) Reopen, Retransmit, ole-jpaul Void, Split (versions of PO) A: OLE_Fiscal_Officers Acquisitions ole-rorenfro, ole-jaraujo Purchasing/Accounts Payable Line item Receiving to be completed prior to Contract Manager Assignment Payment Request S: OLE Selectors A: OLE ACQ-Mgr Payment Request ole-hachris Receiving ole-cstan Requisition PO required for Payment Submit Approve Request Vendor Credit Mem B: OLE RCV S: OLE-Invoicing, Requisition 3 Purchase Payment APO ole-mshaun ole-jshowalter (Pre-Order) Order * Line Item Request Payments B: OLE_Acquisitions (vendor K: OLE_Receive-Mgr A: OLE Payment Any Selection or Acquisition ole-fermat invoicing) ole-msmith user may save or submit ole-abeal Exception (temporary) Requisitions & act on own in OHQ X: CM Assignment OLE_super_selectors ole-parke, ole-khuntley ole-mandrew B: OLE_RCV A: OLE_Receive-Mgr ole-mshaun ole-mshaun ole-msmith Order Holding Queue * Provisional Bibliographic Document created & Workflows Legend: available to Editor as well as Single Item document Receiving Receiving Queue/Search Correction created for each REQ/PO/POA line item Actions below are from Rice roles, permissions & workflows, but the abbreviations and presentation are for this guide and user training only. **VENDOR** Example: B: OLE_Acquisitions S: ole_selectors (Role designated for users who can Submit) ole-fermat Lookup and Maintenance ole cstan (sample user login for this action) Edits A: ole_acquisitions (Role designated for users who can Approve) Vendor ole-fermat (sample user login for this action) Vendor A: OLE VND-Reviewer S: Submit New ole-eurainer S: OLE Acquisitions User can submit e-doc, but it must route thru approver. Most users can access or ole-fermat submit e-docs, but some are blocked. If user does not have explicit permissions for an e-doc, then they may "submit", but document routes to workflow approver. **MAINTENANCE B:** Blanket approve B: see each e-doc User can submit/approve in single step via "blanket approve" if all business rules Example: Edits are met. Exceptions or errors wills route to approvers. Maintenance Doc: Category © Carrier © Category S: OLE-Acquisitions (ole-fermat) A: Approver A: OLE_ACQ-Mgr (ole-hachris) A: see each e-doc User can approve edocs in submitted/unapproved status via Action List. - some maintenance docs only editable by SysAdmin users New S: see each e-doc K: acKnowledge Quick Links to DEMO: User must acknowledge e-doc in Action List. SEARCH **Chart of Accounts** DEMO site: http://demo.ole.kuali.org/ole-Acquisitions Search Balance Inquiries demo/portal.jsp Notification sent to Action List- no action required. No specific user logins required to execute General Ledger Available Balances Balances(top level) Cash Balances General Ledger Balance General Ledger Entry General Ledger Pending Entry Open Encumbrances FTP site: docstore.demo.ole.kuali.org Searches Load Order Records Username: demo, Password: dem0Nov01e Linked documents in Searches are View or Edit Load Reports E-docs that do not meet biz rules will route with exception status, usually to based on e-doc permissions Sample **Vendor**: Search criteria- *ybp* or BBYBP Sample fund: Chart "BL", Account "2947500", Linked editors open to all users from Docstore Sample users are representative persons, and not the only users who can perform Object Code "7119" Search the noted actions. See Drivers Manual. Acquisitions Search