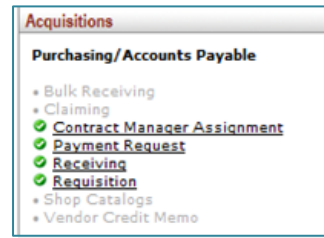


# OLE 0.3 Acquisitions Routing & User Roles: Reference Guide

Default super-user: ole-khuntley

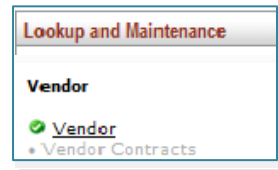


## ACQUISITIONS

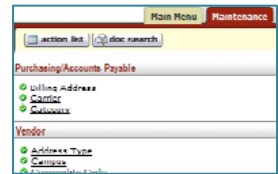


Any Selection or Acquisition user may save or submit Requisitions & act on own in OHQ

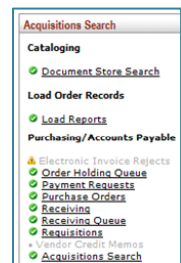
## VENDOR



## MAINTENANCE



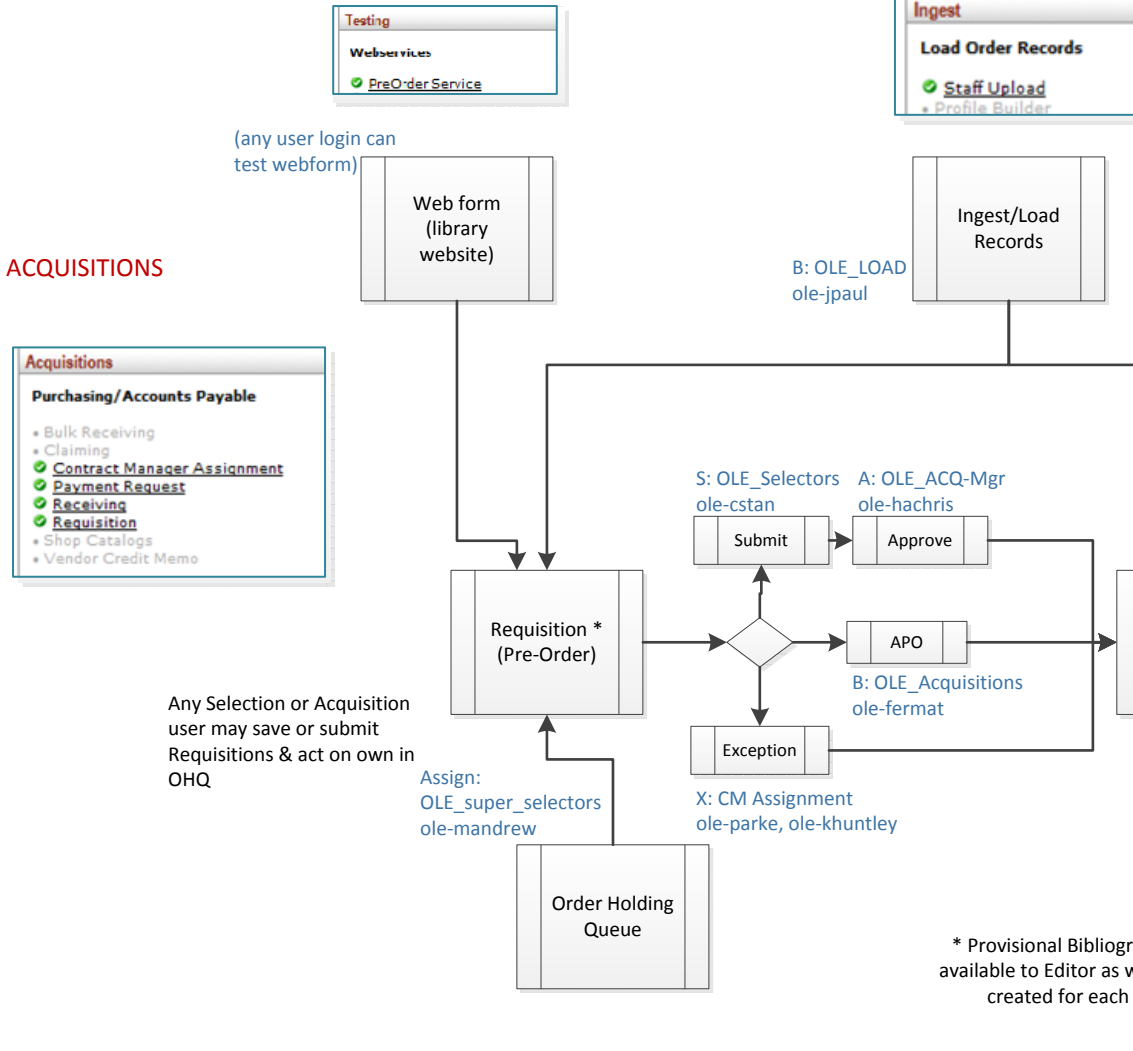
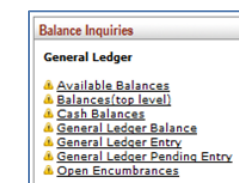
## SEARCH



No specific user logins required to execute Searches  
Linked documents in Searches are View or Edit based on e-doc permissions

Linked editors open to all users from Docstore Search

## Chart of Accounts



### Workflows Legend:

Actions below are from Rice roles, permissions & workflows, but the abbreviations and presentation are for this guide and user training only.

#### Example:

S: ole\_selectors (Role designated for users who can Submit)  
ole\_cstan (sample user login for this action)  
A: ole\_acquisitions (Role designated for users who can Approve)  
ole-fermat (sample user login for this action)

#### S: Submit

User can submit e-doc, but it must route thru approver. Most users can access or 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.

#### B: Blanket approve

User can submit/approve in single step via "blanket approve" if all business rules are met. Exceptions or errors will route to approvers.

#### A: Approver

User can approve edocs in submitted/unapproved status via Action List.

#### K: acknowledge

User must acknowledge e-doc in Action List.

#### F: FYI

Notification sent to Action List- no action required.

#### X: eXception

E-docs that do not meet biz rules will route with exception status, usually to Approver.

Sample users are representative persons, and not the only users who can perform the noted actions. See Drivers Manual.

### Quick Links to DEMO:

**DEMO** site: <http://demo.ole.kuali.org/ole-demo/portal.jsp>

**FTP** site: [docstore.demo.ole.kuali.org](http://docstore.demo.ole.kuali.org)  
Username: demo, Password: demONov01e

Sample **Vendor**: Search criteria- \*ybp\* or BBYP  
Sample **fund**: Chart "BL", Account "2947500", Object Code "7119"