The following table lists and describes each data field on the OLE Vendor eDoc. Data fields that have not been altered or added by the OLE project have definitions provided by the KFS user manual. The KFS User Manual describes the Vendor eDoc athttp://testdrive.kfs.kuali.org/kfs-ptd/static/help/default.htm?turl=WordDocuments%2Fvendorpven.htm.

Document Header – completed automatically	
Doc Nbr	A unique, sequential, system-assigned number for a document
Status	Also known as Route Status. The current location of the document in its routing path.
Initiator	An OLE user role for a person who creates (initiates or authors) a new document for routing. Any Kuali user may initiate most of the document types, however, an Initiator may be required to belong to a Role for certain restricted document types (for example, Journal Voucher).
Created	The date on which a document is created
Document Overview tab	
*Description	This is a free form text field which is required when a new document is created. The description will follow the document through the routing chain.
Org. Doc. #	The organization document number. If the organization does not use an internal referencing system, this field is left blank.
Explanation	Allows you to include additional information about the document that does not fit into the **Description** field (which is limited to 40 characters).
Vendor *tab*	
General Information section	
Vendor Number	Display-only. A unique, system-generated number that identifies this vendor, assigned at the time the document is approved.
Vendor Name	Required if **Vendor Last Name** and **Vendor First Name** fields are blank. Enter the vendor name that is not a first and last name. If the vendor should be identified by a first and last name, leave this field blank.
Vendor Last Name	Required if **Vendor Name** field is blank. Enter the vendor last name. If the vendor should be identified by a company name or title, leave this field blank and use the **Vendor Name** field.
Vendor First Name	Required if **Vendor Name** field is blank. Enter the vendor first name. If the vendor should be identified by a company name or title, leave this field blank and use the **Vendor Name** field.
Vendor Name	Display-only. A unique, system-generated number that identifies this vendor, assigned at the time the document is approved.
Corporate Information section	
*Vendor Type	Required. Select the appropriate vendor type from the **Vendor Type** list or

	select if from the **Vendor Type** lookup . Examples include 'Disbursement Voucher' and 'Purchase Order. A vendor's type determines on which KFS documents it may be used. Different vendor types are used on different documents
*Is this a Foreign Vendor?	Required. Select 'Yes' from the list if the vendor should be identified as foreign. Select 'No' if the vendor is not identified as foreign.
Tax Number	Required for non-foreign vendors. Enter the vendor's tax ID number or SSN.
Tax Number Type	Required. Select the **Tax Number Type** option that describes the tax number entered in the Tax Number field. If no Tax Number was entered, select 'None.
*Ownership Type	Required. Select the appropriate type from the **Ownership Type** list, or search for it from the **Owner Type** lookup . Examples include 'Corporation,' 'Non-Profit,' and 'Individual/Sole Proprietor. The ownership type is found on the tax document (W9, W8Ben for example) submitted by the vendor.
Ownership Type Category	Optional. Select the appropriate category from the **Ownership Category** list, or search for it from the **Owner Category** lookup . The ownership category more specifically identifies the vendor, often indicating the type of services this vendor provides. Examples might include 'Health Care Services' or 'Legal Services.
W9 Received	Optional. Select 'Yes' or 'No' from the list to indicate if a W9 has been received for this vendor. Certain types of vendors may be required to have a W9 on file before they may be approved for use.
W-8BEN Received?	Optional. Select 'Yes' or 'No' from the list to indicate if a W-8BEN has been received for this vendor. Certain types of foreign vendors may be required to have a W-8BEN on file before they may be approved for use.
Backup Withholding Begin Date	Optional. Enter the effective date for backup or select it from the calendar , if the vendor is subject to backup withholdings.
Backup Withholding End Date	Optional. Enter the date to discontinue backup withholding or select it from the calendar , if the vendor is subject to backup withholdings.
Debarred	Optional. Select 'Yes' or 'No' from the list to indicate whether or not this vendor has been debarred. This designation indicates that an institution has been barred from doing business with this vendor by the state or federal government.
Detail Information section	
*Currency Type	Required. Currency type of the vendor. Select the appropriate currency type from the **Currency Type** list or select if from the **Currency Type** lookup .
Payment Terms	Optional. Select from the **Payment Terms** list or select it from the **Payment Term Type** lookup . Payment terms include the number of days a payment is due and whether a discount is available for prompt

	payment.
Pre-Payment	Optional. Select 'Yes' or 'No' from the list to indicate whether or not this vendor accepts pre-payments.
Credit Card	Optional. Select 'Yes' or 'No' from the list to indicate whether or not this vendor accepts credit card payments.
Minimum Order Amount	Optional. Enter an amount if the vendor requires a minimum dollar amount for orders.
Shipping Title	Optional. Select a title from the **Shipping Title** list or select it from the **Shipping Title** lookup . The shipping title determines when ownership of the product takes effect. For example destination indicates that ownership takes effect when the product arrives at the delivery location.
Shipping Payment Terms	Optional. Select the terms from the **Shipping Payment Terms** list or select it from the **Shipping Payment Terms** lookup . This determines whether the institution pays for shipping charges.
DUNS Number	Optional. Enter the nine-digit vendor Data Universal Numbering System (DUNS) number if available. The DUNS number is a unique identifier for businesses that register with Dun and Bradstreet.
Vendor URL	Optional. Enter the URL for the vendor's website.
Confirmation	Optional. Select 'Yes' to indicate that this vendor needs a printed or faxed copy of a PO if the order has been phoned in. Select 'No' if an additional confirmation copy of the PO is not required by the vendor.
Sold To Vendor Number	Display-only. Automatically displayed when the **Sold To Vendor** is entered.
Sold To Name	Display-only. Automatically displayed when the **Sold To Vendor** is entered.
Restricted	Optional. Select 'Yes' or 'No' from the list to indicate whether or not the use of this vendor is restricted. A restricted vendor is ineligible for APOs.
Restricted Date	Display-only. Automatically displayed by the system when 'Yes' is selected in the **Restricted** field.
Restricted Person Name	Optional. The system automatically displays the name of the document initiator when 'Yes' is selected for Restricted.
Restricted by Principal Name	
Restricted Reason	Required if Restricted is set to 'Yes. Enter a text description indicating why this vendor is restricted.
Remit Name	Optional. This field is for information purposes only and does not carry forward to payments requests or disbursement vouchers.
Active Indicator	Required. Select the check box if the vendor is active. Clear the check box if it is inactive.
Inactive Reason	Optional. If inactivating a currently active vendor, select a reason from the **Inactive Reason** list or select it from the **Vendor Inactive Reason** lookup

	. Examples might include 'Sold' or 'Out of Business.
Transmission Format tab	
*Transmission Format	Required. Transmission format of the vendor. Select the appropriate currency type from the **Transmission Format** list or select from the **Transmission Format** lookup .
*Preferred Transmission Format	Indicate whether or not the vendor transmission format/type is the preferred one or not. Required. Select the check box if the Transmission Format is the preferred format. Clear the check box if it is not the preferred format.
*Transmission Type	Required. Transmission Type of the Transmission Format. Select the appropriate currency type from the **Transmission Type** list or select from the **Transmission Type** lookup .
Connection Address	Optional. Address of the transmission type.
User Name	Optional. User Name of the transmission type.
Password	Optional. Transmission Type password.
Active Indicator	Required. Select the check box if the Transmission Format is active. Clear the check box if it is inactive.
Address tab	
*Address Type	Required. Select an address type from the **Address Type** list or search for it from the **Address Type** lookup .
*Address 1	Required. Enter the first line of the address information.
Address 2	Optional. If necessary, enter the second line of the address information.
*City	Required. Enter the city name for this address.
State	Optional. Select the state from the **State** list or select it from the **State Code** lookup . State may be required under certain circumstances (such as when entering a US address).
Postal Code	Optional. Enter the postal code for this address. Postal code may be required under certain circumstances (such as when entering a US address).
Province	Optional. Enter the province for this address.
*Country	Required. Select a country from the **Country** list or select it from the **Country** lookup .
Attention	Optional. Enter to whose attention it should be directed to, if you want this address to have an attention line.
URL	Optional. Enter a URL you want to associate with this vendor address.
Vendor Fax Number	Optional. Enter the vendor fax number you want to associate with this address.
Email Address	Optional. Enter the vendor email address you want to associate with this address.
Set as Default Address	Required. Select 'Yes' or 'No' from the list to indicate if this address should be used as the default for this vendor or not. Every vendor must have one default address.

Address Note	
Active Indicator	Required. Select the check box if the address is active. Clear the check box if it is inactive.
Contact tab	
*Contact Type	Required. Select contact type from the **Contact Type** list or select it from the **Contact Type** lookup .
*Name	Required. Enter the name of the contact.
Email Address	Optional. Enter the email address for this contact.
Address 1	Optional. Enter the first line of the address information for this contact.
Address 2	Optional. Enter the second line of the address information for this contact.
City	Optional. Enter the city name for this contact.
State	Optional. Select the state from the **State** list or select it from the **State Code** lookup .
Postal Code	Optional. Enter the postal code for this contact.
Province	Optional. Enter the province name for this contact.
Country	Optional. Select the country from the **Country** list or select it from the **Country** lookup .
Attention	Optional. Enter to whose attention it should be directed to, if you want this address to have an attention line.
Comments	Optional. Enter any additional comments about this contact.
Active Indicator	Required. Select the check box if the contact is active. Clear the check box if it is inactive.
Phone Number section	
*Phone Type	
*Phone Number	
Extension	
Active Indicator	
Supplier Diversity tab	
*Supplier Diversity	Required when the tab is used. Select the supplier diversity type from the Supplier Diversity list or select it from the **Supplier Diversity** lookup .
Active Indicator	Required. Select the check box if the supplier diversity type is active. Clear the check box if it is inactive.
Shipping Special Conditions tab	
*Shipping Special Conditions	Required. Select the type from the **Shipping Special Conditions Type** list or select it from the **Shipping Special Condition** lookup.
Active Indicator	Required. Select the check box if the shipping special conditions type is active. Clear the check box if it is inactive.
Percent*	Indicates the Percentage that will be applied to the Line Account. System default data value 100%.
Vendor Commodity Codes tab	
Commodity Code	Optional. Enter the commodity code.
Commodity Default Indicator	Optional. Select the check box if this commodity code is to be used as the default for this vendor. This commodity code is used on APOs where an institution has indicated that the commodity code is required on POs but

	not on requisitions. Clear the check box if this commodity code is not to be used as the default.
Active Indicator	Optional. Select the check box if this commodity code is active for this vendor. Clear the check box if it is inactive for this vendor.
Search Alias tab	
*Search Alias Name	Required. Enter the alternate name that may be use to search for this vendor.
Alias Type	Optional. Identifies the search alias type applied via the OLE Alias Type maintenance table. Sample data values - Abbreviation, Vendor Code, External Vendor Code.
Active Indicator	Required. Select the check box if the search alias name is active. Clear the check box if it is inactive.
Vendor Phone Number tab	
*Phone Type	Required. Select the phone type from the **Phone Type** list or select it from the **Phone Type** lookup .
*Phone Number	Required. Enter the phone number.
Extension	Optional. Enter the extension for the phone number.
Active Indicator	Required. Select the check box if the vendor phone number is active. Clear the check box if it is inactive.
Acquisition Unit Vendor Accounts tab	
*Acquisition Unit's Vendor account / Vendor Info Customer #	Required. Enter the number this vendor uses to identify your institution or organization as a customer.
*Chart Code	Required. Select the chart this customer number should be associated with from the **Chart Code** list or select it from the **Chart** lookup .
*Account Number Owner (Organization Code)	Optional. Enter an organization code to associate with this customer number or select it from the **Organization Code** lookup .
Discount	
Discount Type	
Standard Delivery Carrier	
Standard Delivery Carrier Interval	
Active Indicator	Required. Select the check box if the customer number is active. Clear the check box if it is inactive.
Contracts tab	
Contract Name	Required. Enter the name used to identify this vendor contract.
Description	Required. Enter a text description that describes the contract.
Campus	Required. Select what institution campus this contract is associated with from the **Campus** list or select it from the **Campus** lookup .
Begin Date	Required. Enter the effective date of the contract or select it from the calendar .
End Date	Required. Enter the expiration date of the contract or select it from the calendar .
Contract Manager	Required. Select the name of the person at your institution who manages this contract from the **Contract Manager** list or search for it from the

	Contract Manager lookup .
PO Cost Source	Required. Select a cost source for this contract from the **PO Cost Source** list or search for it from the **Purchase Order Cost Source** lookup .
Payment Terms	Required. Select the payment terms for this contract from the **Payment Terms** list or search for it from the **Payment Term Type** lookup .
Shipping Terms	Optional. Select the shipping terms for this contract from the **Shipping Terms** list or search for it from the **Shipping Payment Terms** lookup .
Shipping Title	Optional. Select a shipping title for this contract from the **Shipping Title** list or search for it from the **Shipping Title** lookup .
Extension Option Date	Optional. Enter the date up until the contract may be extended or select it from the calendar .
Default APO Limit	Optional. Enter the upper dollar amount for which automatic purchase orders (APOs) under this contract may be created.
Active Indicator	Required. Select the check box if the contract is active. Clear the check box if it is inactive.
Notes and Attachments Tab	
Posted Timestamp	Display-only. The time and date when the attachment or note was posted.
Author	Display-only. The full name of the user who has added the notes or attachments.
Note Text	Required. Enter comments.
Attached File	Optional. Select the file to attach by clicking **Browse** and using the standard **Choose File** dialog box. Click **Cancel** to clear the file name you have selected.
Notification Recipient	
Actions	Click add to add a note.
Ad Hoc Recipients Tab	
Person Requests section	
Action Requested	Required. Select the desired action from the **Action Requested** list. The choices are **APPROVE**, **ACKNOWLEDGE**, and **FYI**.
Person	Required when routing the document to an individual. Enter a user ID or select it from the lookup .
Actions	Click add to add an ad hoc request to a person.
Ad Hoc Group Requests section - Required when routing the document to a group. Enter a group name or select it from the lookup .	
Action Requested	The action one needs to take on a document; also the type of action that is requested by an Action Request.
Namespace Code	Code for the group selected in *Name*.
Name	Enter the group name or use the **Lookup** icon to search for the appropriate group name.
Actions	Click add to add a an ad hoc request to a group.
Route Log Tab	
ID	
Title	A short summary of the notification message.
Type	The document type. The full name of the transaction used to identify this

	document type in Workflow.
Initiator	An OLE user role for a person who creates (initiates or authors) a new document for routing.
Route Status	The workflow status of a document in the course of its routing.
Node(s)	The current route node of the document—that is, the current step that the document is on, on its route path. Route nodes are also referred to as 'route levels'.
Created	The time and date that the document was created.
Last Modified	The time and date that the document was modified last.
Last Approved	The time and date that the last action was taken on this document.
Finalized	The time and date that the document reached' Final,' 'Canceled,' or 'Disapproved' status.
Actions Taken section	
Action	System action.
Taken by	Name of the person who took the action.
For Delegator	Name of a delegate that took action on someone else's behalf.
Time/Date	Time and date the action was taken.
Annotation	
Pending Action Requests section	
Action	Indicates whether the document is in a user or group's action list or is pending their approval.
Requested of	Displays the name of the user or group responsible for the pending action.
Time/Date	
Annotation	
Detail section	
Node	The route node at which this request was generated.
Priority	The priority assigned to this workflow request. If multiple requests are generated at the same workflow node, the system generates requests with low priority numbers before requests with higher priority numbers.
Approval Policy	A value indicating whether members of a role receiving this request must each take action to fulfill the request or if only a single role member must take action.
Forced Action	A true/false indicator specifying whether a user must take action on this document even if he or she has acted on it previously. If 'True,' then the user must take another action. If 'False,' then the previous action will automatically fulfill this request.
Future Action Requests section	
Action	
Requested of	
Time/Date	
Annotation	Message that is generated based on the KIM responsibilities being referenced by Workflow
Log Action Message section	
Action Message	