**Friday, April 12, 2013**

1. It seems it would make sense to cover Organizations before we get into specific workflows that may be required for our specific modules.
   1. Organizations, can these be used for our work units?
      1. examples depts, divisions,
      2. there are types of organizations
      3. organizations can be hierarchical
      4. accounts can be associated at any level
      5. what about orgs not associated with accounting strings?
         1. can be associated with initiator for example and no relationship to accounts
   2. Options for controlling ordering, receiving security by location, org, other options?
      1. persons can be associated with a person
      2. kim can understand that relationship b/n person and org and do something with it - like control routing or access
      3. set up a role (e.g., serial receiver) with a qualifier (e.g. location)
      4. template by document and actions, roles, restrictions
      5. orgs can be associated with people through ‘department’ field
      6. multiple organization associations to one person
      7. the association can be through a role with a role qualifier (e.g. campus or other location based organization)
      8. kim is also aware of the hierarchy structure of organizations
      9. the qualifier could be based on OLE’s shelving location structure
      10. Kim has a UI, it is a module of Rice
2. Side question - how easy is it to change the names of the tabs that are open - perhaps style sheets; kim can also control what actions open new tabs
3. Defaulting Delivery by initiator - after selecting delivery information - button “set as default building” and stays with the user id - not a cookie.
4. Final delivery and Receiving addresses are different
5. Access Security is available in OLE to control access by person to different accounting data for different documents
6. Contributions are available to setup default accounting for an initiator from partners in kfs
7. Would it be worth our while to move forward with specific module scenarios in the following manner:
   1. Develop our document configuration template (Chris has volunteered to pull this together from existing efforts from Kathy and possibly examples from Kymber)
   2. Have each module provide a sample of configurations to bring to a session and implement in an ole environment. This would prove out our template and hopefully give us a fuller understanding of all the ins/outs of configuring documents roles, permissions and responsibilities. The hope is this template may be useful to implementers and part of our documentation out of the box.