**Tuesday, April 23, 2013**

1. [Deposit Accounts Background](https://docs.google.com/a/kuali.org/document/d/1B89kb7X4MNHJECiH2u-IqUYGbzsFsLcGxR6kYwMOmSo/edit)
	1. Bob shared background of why Libraries provide pre-payments to Vendors. In some cases this is required by Vendor, others a discount is offered. Not tied to any specific order.
	2. Kymber: UofA - Non Check/Non-ACH Payment - Contribution to be added to the base KFS contributed from Univ of Arizona is the process for UofA to address this type of functionality. Jonathan provided this modification. KFSCNTRB-529. **Action:** Need a technical review of this contribution to determine the effort to bring this into 1.0. FC/SME’s need to weigh what is in place and the effort to bring that to where we could be vs. effort to implement contribution. (UCONN, UCI have both picked up this contribution - Keiko at UCI’s review touches approx 200 files, UCI did not pick up all of contribution) Action: Is this change going to benefit us with OLE-2099 (1.0) also?
	3. KFSCNTRB - 1020 - another contribution of interest
	4. **Action:** What do we need to do to ensure the many to one functionality is a contribution to the KFS Project?
2. Contribution Process - **Action:** Nora we need to document the manner in which we can review contributions to KFS/Rice that Kymber demonstrated with the jira projects in this session - Bob will work with you on this once you have an initial draft. Patty/Team need to develop process to assess contributions and adopt in OLE.

**Future Sessions**

1. S&A - look at the Contract Manager routing to see how that fits with our licensing
2. Describe - what do we have on the bib record that we can use to identify this record belongs to a work unit
3. System Parameters and how they are used for business rules and the association with KRMS.
4. Templates for Charts - Kymber will dig up some examples; OLE’s should be simpler since we don’t need to publish financial statements so lots of the attributes are unnecessary
5. S&A -- fund codes -- has anyone
6. S&A -- credit memos:
	1. how does OLE process them through PDP? (Most library systems treat a credit just like an invoice with a negative amount.)
	2. how do you credit a PO that hasn’t been invoiced? (this happens occasionally, and will be common in the first few months after implementation)

**ActionList:**

1. Dev team researching the ability to convert Describe documents to transactional documents. Must be able to establish doctypes to apply permissions, etc- ...**Vijay will provide input.**
2. Workgroup for streamlining roles/permissions out of the box. (Patty/Chris, Lead SMEs) see [OLE-2026](https://jira.kuali.org/browse/OLE-2026)
	1. Clean up OLEFS permissions that were integrated from KFS
	2. Design that includes maint doc config, trans doc config, sys doc config
	3. Define the bare minimum for the parents/grandparents and work from there.
	4. Template - define our configuration requirements -**Chris Case will be working on this template.**