**Tuesday, June 4, 2013**

Invoicing - new initiation screen and new doc for collecting invoice information for OLE

* eInvoicing job - Finds PO, creates PREQ; Electronic Invoice Reject docs in KFS.
* Invoice would route in OLE, PREQs just get created. Would need to change routing on the job.
* Remove Bank Code on PREQ - IDs bank that cuts the check
* Process Item from Account Receivable Payment App - pulls in invoices, lists POs. May be helpful when designing the new document
* Prorate from Capital Asset - distribution (by amount or evenly) may be helpful.
* Can we leave things in if it doesn’t hurt things? If designing new, remove. Things are easily removed. Can just be removed from the UI
* Concern: Modify PREQ has created a lot of problems in the past.
* Blanket Orders - Could create 1 PO for vendor then apply items to PO. Amendment - could amend for new items ordered. Alternatively: ongoing order; change REC to reflect what comes in.

Staff Alerts - in action lists, for future activities (renewals, etc) - KEN, messaging. Kymber not for sure but creates items (methods, not docs) in the action list. Jonathon may know.

* Manual reminders (remember to get check back with a vendor; Serials haven’t arrived on time). May need to be a Rice enhancements.

Event Log - Coeus has event log. Could always add notes.

* KFS audit trail. MSU has created a way to see changes in amendments. Don’t allow changes on documents. Cornell is adding a note for each acct line change (won’t be in trunk for a while).
* OLE wants notes/audit trail. Would also want users to be able to add notes as needed, to record history. - Versioning: there are needs for versioning. Notes can be added anytime already.
* Vendor notes tab: keeps track of notes. Anytime you note on doc (update table on maintenance doc), it tracks on the vendor (which is an object). Creates docs to make changes to an object.
  + Maintenance doc (object) makes changes to tables; transactional docs create entries (move $ around accts in KFS) and use maintenance docs.
  + Kuali way is that everything is a document. Maintenance docs have old/new side and keeps track of changes.
  + Lookup icons - searches on maintenance docs. Change a maintenance doc and it changes the values on the docs. (Main menu docs in KFS will route).
* Status Changes: Waiting on Additional Info - pauses the workflow; can be added to any doc.

Contributions - usually have fspec, tspec, code. Will need to be careful using contributed code as we continue to upgrade KFS.