**Tuesday, May 21, 2013**

Default values:

* On a requisition - Deliver (set by user) and Receiving Address (maintenance doc linked to chart and org)
* On a purchase order - Vendor Choice (why was this vendor chosen; noted for purchasing questions that can arise)

Kymber runs through a sample of requisition to purchase order in KFS. Note: some functionality has already been changed in OLE.

In KFS, setting up a sample/template requisition - set up addresses, vendor, add items and account information. Calculate, submit or save. Copy to use again (and anyone can copy any document). Use the copy feature, change the items, accounting lines.

OLE links item to bib records. Could it work to clear the record on copy? Relink one PO from one bib to another (spec being considered)?

Account number, object codes can be alphanumeric.

Additional defaults that could possibly be modified for PURAP-

* Accounts receivable: item code. On invoices, looking up an item code fills in most of the accounting lines. Can include item price and amount if always ordering same item/amount.
* Organization accounting default - accounting lines are filled in based on the (only one) org associated with user. On invoices, default accounting lines by organization associated with user.

There are no way to set up person-defaults for Kuali. Defaults on new e-docs - will have to be requested to development, functional people cannot set them at this time.

Searches - saved searches not applied to OLE specific searching.

KFS 5.1 is planned around Sept. Contribution release. JIRA KFS dashboard “PM report new” to see what is planned for the release.