**Tuesday, May 7, 2013**

Workunits - a place where work is performed. Circulation has “circulation desk”. Catalogers work on records for particular libraries or campuses.

1. KFS has ‘campus’ as an object. Physical, financial, both. Divides location even if a true campus isn’t associated.
2. Libraries can be considered a campus; OLE could also create objects if campuses don’t work.
3. KFS doesn’t have workunit but campus, dept, organization.
   1. Campus determines where PO get routed
   2. Campuses get associated with persons in KIM
   3. Accounts and funds are associated with particular campuses. KFS does not restrict accounts though so anyone could use them.
4. Access security, a module in KFS, can restrict what accts are used by whom. Delivered with KFS but complicated to use.
   1. All documents set by parameters and permissions. Need to figure out who can change a document and when.
5. Are there superusers who can change any campus or library? In KFS, usually superusers gets things moving in the workflow: managers who can change anything at any time. Blanket Approve - central admin usually can create, blanket approve to push past workflow.
6. Libraries need workflows to monitor/report how many records are created for a workunit; who created a particular cataloging record.
   1. You can specifically link campus to doc with KFS
   2. You can find the doc through the initiator. On REQ, chart, org is associated with the initiator. DVs route by campus code to campus processing unit.
7. Campus is separate of chart, org but can be set up to be in sync.
   1. Bob suggested maybe chart and org for PURAP docs; campus for docstore
   2. Set up permissions for chart and org, another set of permissions set up for campus
   3. If someone without access pulls up a document that isn’t part of their campus, the document is only viewable, not editable.
   4. Could set up the document so that someone outside of the campus cannot edit but can copy. KFS does not allow copying of maintenance docs because the doc may not be the most current version.
   5. Maybe very useful for consortia; too complicated for others? Location attributes are already set up, campuses may easily be applied.
   6. With permissions, can set up for 1 person to do the whole workflow or several people to do different tasks. Roles can be set up for each task. OLE should deliver simple/general roles and permissions, than institutions can modify.
8. Setting up defaults for particular fields - UC Irvine has particular accounting strings defaulted for some docs. KRAD may help with defaults. REQs have operator settings for address defaults but only that one field.
   1. Removing ‘room’ as part of the address? Can also be set as part of default. The field isn’t validated
   2. Defaults are set up in libraries to streamline, can be mostly overridden.