

# Administration Guide

## Front Office 9.5

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## 1.0 Introduction

This manual introduces the main areas required to administer the Front Office System. The document is formatted in such a way as to be able to be used as a reference guide to aid in configuration and administration tasks. All features available in Front Office are included, however features can be restricted, depending on your license. Please contact [info@biomni.com](mailto:info@biomni.com) to find out more information or to request a no obligation trial license.

This document does not cover operating Front Office in Multi-Tenant mode: details of that can be found in the Front Office Multi-Tenant Solution Guide.

The [Biomni Community](https://community.biomni.com/) provides an ever-increasing set of self-help resources, including knowledge base articles, FAQs, videos, adapters, and templates to download etc. Support tickets can also be logged here, accessible online at <https://community.biomni.com/>.

Throughout this manual the System Configuration Settings area of Front Office is referred to when specific functionality is required as settings need to be activated within this area. Links are also provided to Related Topics within sections where more specific detail can be obtained.



## 2.0 First Steps

When setting up a new Front Office implementation some logical steps should be followed to configure the system to suit your individual requirements and needs. The Administration Menu provides access to the set up and configuration areas of the system. Access to this menu is controlled by a user's access profile. Within the Admin screen, categories are presented which in turn allow you to build the system to work and perform in the required way for users on various levels of access.

The initial steps are to ensure that your organization data is in the system, which can be achieved using import functionality via standard CSV or Unicode text file templates. Organization data includes:

- Divisions (multiple cost centers sit within Divisions; these divisions can restrict access to requests raised on the system)
- Cost Centers (each cost center must be assigned a Division; the shipped GEN Division can be used if other divisions are not required)
- Addresses (delivery and invoice addresses to appear on the requests raised on the system)
- Access Profiles (to determine what the user can see and do when logged in to the system)
- Users (who will be able to login and use the system)
- User Groups (used for restricting access to specific areas of the Service Catalog and reports)

### Related Topics:

[Division](#)

[Cost Center](#)

[Address](#)

[Access Profile](#)

[User](#)

[User Group](#)

[Data Import](#)

Once the organizational data is in the system you can begin to define the processes that users will follow to request and view information relating to services and products, any approval workflows required and where this request information is sent once the process is complete within Front Office.

Front Office is a multi-supplier / catalog supporting tool, enabling you to manage and provide many catalog items to your users for selection, whether this is via the targeted Service Catalog, full supplier catalog view or logically grouped bundles of products.

When items are requested from a catalog or bundle, a suitable request form can be invoked to ensure that all the necessary request information is captured to enable the request to be fulfilled.

Business forms can also be created, to enable users to request those items or services that are not necessarily catalog items, e.g., holiday requests, access to email etc.

Each request type can be controlled independently, including fields that are displayed, the approval flow that is required and request overall workflow.

Users can access a customer configurable Service Catalog to drill down through a logical category structure and select the items or services (or a combination of both from a bundle) required.

**Related Topics:**[Supplier](#)[Catalog](#)[Bundle](#)[Request Type](#)[Approval](#)[Service Catalog](#)

## 3.0 Front Office Administration

Within the Administration menu the main system configuration categories can be seen. Only users with the appropriate administration rights can access this area. Administrators and Supervisors have full access by default but all top-level categories within the Administration area can be controlled by specific access rights. Below each of the administration categories are listed, with links to general information regarding the options that can be found within each section. Links to related topics can be used to view more specific detail when creating or editing within any of the administration screens.

### 3.1 Service Catalog & Notices

[Service Catalog](#)

[Service](#)

[Notice](#)

### 3.2 Request & Approval

[Request Type](#)

[Request Field](#)

[Approval Matrix](#)

More.....

[Cost Center Approver](#)

[Position Code](#)

### 3.3 Supplier, Catalog & Bundle

[Bundle](#)

[Catalog](#)

[Supplier / Supplier Account / Product Type](#)

[Shortcuts](#)

More....

[Commodity Type / UNSPSC Commodity Type](#)

[Approved List](#)

### 3.4 Organization

[Access Profile](#)

[User](#)

[User Group](#)

[Cost Center](#)

[Division](#)

[Address](#)

[Report](#)

[Tenant](#)

### 3.5 Settings

[System Configuration](#)

[Adapter](#)

[License](#)

[Task](#)

[Template](#)

[Email Template](#)

[XSLT Library](#)

[Custom Form](#)

[Theme & Customization](#)

[Integration Settings](#)

[Currency & Language](#)

[Currency & Exchange Rate](#)

[Language](#)

[More...](#)

[Custom JavaScript](#)

[Auto-Receipting](#)

[System Code](#)

[Business Time](#)

### 3.6 Support

[Biomni Support](#)

[Error Log](#)

[Configuration Check](#)

[Task Queue](#)

[Email](#)

[Email Queue](#)

[Email Log](#)

[Integration Logs](#)

[Catalog Import Log](#)

[Adapter Log](#)

[External User Import Log](#)

[PunchOut Log](#)

More...

[Audit Log](#)

[Login Log](#)

[Internal Workflow Log](#)

[Internal Workflow Action](#)

[SLA Log](#)

[DataCenter Transaction Logs](#)

[Documents](#)

## 4.0 Service Catalog & Notices

The Service Catalog is a fully configurable means of presenting the services, apps, and information available to the business, in a highly graphical manner. All types of categories can be mixed and matched to present a richer offering to employees with diverse needs, ranging across the organization.

An **App Store** allows a library of image-rich available applications to be offered so that business users can make their own sourcing decisions. This allows IT to retain control without limiting decision making abilities of the business users. Configurable filters can be defined to enable easier discovery and delivery can be determined by individual app, whether immediately downloadable or requested for subsequent delivery through a range of integration options.

A **panel** allows real time HTML content from an external source to be presented. This might be the logged-on user's open tickets, division reports, or even a news feed. It is also possible to present clickable buttons within the panel that could automatically create a context appropriate request, e.g., add extra memory to a specific VM, from a list of available VMs.

A **service category** can be configured with HTML embedded images and links to aid navigation and service discovery. Categories can contain any number of sub-categories or Services and access restrictions can be applied to any category or Service within the catalog to ensure that users only see what is relevant to them.

The Service Catalog administration pages allow WYSIWYG ('what you see is what you get') editing of the hierarchy and allows moving / copying of category nodes as well as the linkage of services and items.

Designing the Service Catalog begins by deciding what options are being offered to end users and how this can be achieved, e.g., which services should be available to users and how should they be grouped; what information should be included to enable the end user to make an informed choice; where can this information be sourced and how can it be kept up to date; is the service requestable or is it merely conveying information; if requestable, is it driven by one or more products (i.e., a bundle), is it sourced from an app store or is it just a business form; is the information hosted externally; how should the data be presented and are high quality images available to create an attractive and enticing offering, to a similar standard that end users are familiar with socially.

Once a clearer picture emerges, the creation of the Service Catalog can start, with the primary principle always in mind that end users should be able to locate any available offering easily and intuitively. The 'carousel' and 'service menu' are two display options which may be utilized particularly where large catalogs are in use.

A **Notice** is a news-ticker style item which displays at the top of the home page and allows important or relevant information to be presented to the end user. Notice types, of *Alert* or *Information*, can be

customized via the *Admin > Settings > Theme* page. Clicking on a notice allows a rich text display of additional detail or linking out to an external site.



## Designing the Service Catalog

There are three bespoke types of categories: service categories, app store categories, and panel categories; suitable for displaying externally retrieved data in a panel. Each category type has its own configuration options, including the ability to restrict access by user group.

The ‘carousel’ and ‘service menu’ display options allow one, many, or all categories to be included for easier navigation through the catalog. Alternatively, or as well as, important or frequently accessed categories can be displayed on the home page with their child services easily accessible.

The Service Catalog can also incorporate a welcome message at the top of the home page.

A number of images are available out-of-the-box, but an administrator can also upload their own.

If a user is only allowed to view a single category (excluding the welcome message) Front Office will automatically make that category the home page.

Services or App Store items created can be linked to multiple Service Catalog categories where appropriate.

The entire Service Catalog can be imported from or exported to another system; any included service will retain its original status. Every category or service can be accessed directly via a ‘share link’ option, present on each Edit page. The share link can be auto generated or specified by the administrator.

Tip: Navigate back through the Service Catalog using the ‘breadcrumb’ links at the top left of page.

## 4.1 Creating a Service Catalog

On selecting 'Service Catalog', three types of category (container) are available: *Add Category*, *Add App Store*, and *Add Panel*. Each type supports a different type of data: a standard category supports associated services / catalog end points, an App Store displays multiple items from the vendor catalogs, and a panel supports display of externally sourced HTML information.

All types must have a category name set but this name can be hidden for display, which may be appropriate where a full image is being used. Drill-down to the next page is achieved by clicking the image or the title.

The presentation of the Service Catalog can be adjusted via the *Theme* page in Administration: this includes supports for several display options, although certain settings can be overridden when editing a specific category. If good quality images are available for the associated services, consider using a *Tiled Display Type*. Solid background images display best in this mode. The Service Catalog can contain as many categories as desired at this top level, either inside or outside the carousel and / or service menu, if enabled.

The display of all categories can be controlled by an 'enabled' flag, which allows configuration to take place or perhaps temporary unavailability of the services included, without being visible to the end user. Be aware that the category will still be visible within the Admin area.

Creation / editing of categories and positioning / re-ordering of categories within the catalog is actioned within two modes: *Edit* or *Layout* mode, on the right of the Service Catalog home page in *Admin*. When in *Layout* mode, using the panel on the right, categories may be moved (dragged) in or out of the carousel and service menu. Categories outside the carousel can be sized for display, using 'T-shirt' sizes: XS, S, M, L, and XL. This determines how much horizontal space a category will take up on the page.

The home page title (top left) can be displayed or hidden.

The search facility, displayed at the top of each service catalog page, performs a full 'OR' search, with the results ranked by the number of search words found. Service name, service description and attribute fields are searched.

### 4.1.1 Creating a Service Catalog Welcome Message

The 'Welcome' message is an optional section that can be included at the top of the Service Catalog. This can be accessed via the *Edit* button at the top-level Service Catalog page. If the carousel is enabled, the welcome message can be displayed above the carousel or as the first (default) 'category' in the carousel. This positioning can be configured via the *Layout* mode editor.



## 4.2 Creating an App Store

An App Store category is a single level repository of product items, presented as tiles, with support for multiple filters and search options, enabling easy discovery. Products can be configured for a range of 'on selection' actions and a product level hook can also be utilized to extend options for delivery action even further. An App Store category allows product items to be presented in a similar manner to an App Store, so good quality images are important. A default image is displayed if no image is found.

An App will be displayed with up to four lines of text beneath the image. This will typically be name, chosen attribute, rating and price. If app names are typically long and require more space, the attribute field can be left empty.

Once an App Store is created, the actions available from the drop-list against the category name (available by use of 'mouse-over' when in the home page carousel) are *View*, *Edit*, *Move*, *Copy* and *Delete*.

### 4.2.1 Details Tab

A category level image can be included, selected either via the image picker or a URL entered; the image height has no restriction, and the category height will be scaled accordingly; the image width will always be scaled, and the aspect ratio maintained, to a maximum width of 140 pixels. Background images can also be included but are never scaled. The height of the category will expand, assuming a modern browser is used. A background image position can also be selected.

Tip: image scaling can cause a performance hit so best practice is to load images of the correct size. Where icons and graphics are over twice the maximum size, a warning message will be displayed.

The App Store can be linked to a specific request type, with the option to override the default request type from the App Store Product hook. If no request type is associated, the shipped miscellaneous request type will be used.

The action associated with an app can be set to either immediately download from a specified product URL, open a link in a new window or request in the usual way. The button text can also be changed for a product as well as some help text added. These properties can also be overridden by an external hook triggered when the requester views the app details. An item being routed via a request will always be a single cart entry only and will therefore utilize the simplified request process.

### 4.2.2 Content Tab

One or more Front Office 'suppliers' can be associated to the App Store. If no supplier is associated, all active product items across all supplier catalogs will be displayed.

### 4.2.3 Filter Tab

Product attributes (e.g., device type) can be displayed as a list of top-level filters; these are rolled up from individual items within the App Store, to create a distinct list. However, when configuring filters to

be displayed, attributes across all supplier products are presented for selection, and Category name will always be included.

Only attributes applicable to the specific App Store content will be available for selection by the end user. The associated filters will not always be displayed when 'viewing' the App Store within the Admin area, as asynchronous processing needs to occur to generate the filters.

#### 4.2.4 Access Tab

It is possible to restrict who can access a specific App Store by utilizing user groups. An App Store can be open to all or have one or more user groups assigned, to hide or show.

Tip: Create required user groups prior to configuring the Service Catalog.

#### 4.2.5 What the End User Sees

An unpaginated list of items, displayed as tiles, will be displayed to the end user. Where content is extensive, data will be returned in chunks, however, unless the user scrolls down the page very fast, this should be transparent to the viewing user. A chosen attribute can be displayed on the top-level item tile for the App Store.

A 'sort' option allows the returned search results to be displayed by either relevance (displays apps closest to the search parameters first - default sort), rating, popularity, newest (Created Date), price (low to high), price (high to low) or alphabetical (by name). Any additional filters for the App Store are those specified within the App Store definition: only attribute names applicable to the specific App Store content will be available for selection, although Category name will always be included.

The search facility within the App Store searches the Name and additional description fields, as well as part numbers, supplier, and manufacturer. All attributes will be searched, regardless of whether they are configured as top-level filters or not. The search engine delivers a rapid, high performance text search, which uses a daily fully re-compiled index; product additions or deletions are dealt with as they happen during the day, although this may cause the count to be incorrect until a full index job has run. The *Configuration Check* page, available in the Support sub menu, shows details of the latest index and allows a new re-index to be run.

An individual item can be rated (once only) in the Product Details tab by the end user, using a star system, and optionally, a review published. The aggregate rating will be displayed with the tile at App Store level. A supervisor can delete an individual review if necessary. A usage (popularity) figure, indicating the number of times the action button has been clicked for the item, is displayed in the Product Details tab. The usage figure can be manually adjusted via the Catalog Maintenance screen.

**Related Topics:**

[Creating a Catalog item](#)

[Restricting your Category / End Points to User Groups](#)

[Creating a User Group](#)

[Catalog](#)

[Data Import](#)

[Adapter](#)

[Theme](#)

### 4.3 Creating a Panel Category

A panel can be used to insert real time HTML content from an external source, such as a report or website page, into the Service Catalog. The panel's content can be updated without requiring the user to reload the surrounding page.

The panel requires a Name and a Panel URL. The name can optionally be displayed at the top of the panel.

Several properties are available to allow displayed information to be both secure and appropriate to the user:

- User ID
- User Name
- Email Address
- Culture Code
- Time Zone
- Security Token
- Web Root Address (system)

An additional CSS class may be specified for styling. The summary panel height can be specified to override the default size. Panel scrolling can also be controlled.

This feature can also be designed to allow a button click from within the panel to automatically generate a contextual request, using information passed from the panel.

Support is now available for popups to be displayed on the main site when initiated from an externally hosted Service Catalog HTML panel / portlet. The ability to display popups within popups is also possible. Sizing of the popups can be controlled.

A number of additional features are available to support richer featured panel data and presentation. Please contact the support team via the Community at <http://community.biomni.com/home> for further information.

## 4.4 Creating a Service Category

A standard category is used where services or further categories can be presented. Every category must be given a name, although this can be hidden from display, and optionally a fuller description to assist the user’s understanding of the offering: the balance between visual and informational should be considered. Each category added can also be given a short description if differing text is required when the category is seen at top level from when the category is selected. Services within the category can be displayed as small tiles, large tiles, or text. The service catalog menu, if enabled, can be hidden at category level.

A category level image can be included, selected either via the image picker or a URL entered; the image height has no restriction, and the category height will be scaled accordingly; the image width will always be scaled, and the aspect ratio maintained, to a maximum width of 140 pixels. Background images can also be included but are never scaled. The height of the category will expand, assuming a modern browser is used. A background image position can also be selected. The Additional CSS Class field allows specific styling for the category: the value of this field is a reference to a class in the Custom CSS page (Admin > Settings > Them > Custom CSS).

Note: image scaling can cause a performance hit so best practice is to load images of the correct size. Where icons and graphics are over twice the maximum size, a warning message will be displayed.

The actions available from the drop-list against the category name (available by use of ‘mouse-over’ when in the carousel) are *View*, *Edit*, *Move*, *Copy* and *Delete*.

A search option is available to enable service (names) to be searched. Results are returned in context, to aid future navigation.

**Related Topics:**

- [Creating a Catalog item](#)
- [Restricting your Category / End Points to User Groups](#)
- [Creating a User Group](#)
- [Catalog](#)
- [Data Import](#)
- [Adapter](#)
- [Scheduled Task](#)
- [Theme](#)

### 4.4.1 Adding Service Catalog Subcategory Levels, Separator Text, and End Points

To add a subcategory, separator text or end point to the Service Catalog structure, drill down through the existing categories until you reach the required level. Select *Add Category*, *Link Service* or *Add*

*Separator* as required. Depending on the option selected, either enter the appropriate data or link the service to a category, as relevant.

Tip: Categories can be re-sequenced as required using the drag and drop sequencing on the Service Catalog designer / 'Layout' mode.

#### 4.4.2 Restricting Access to Categories and End Points

It is possible to restrict who can see a category or end point within the Service Catalog by utilizing user groups. Each category or end point can be open to all or have multiple user groups assigned, to hide or show.

Tip: Create required user groups prior to configuring the Service Catalog.

##### System Configuration Settings:

Edit the Service Catalog page title

Enable Request Item Category Code in Service Catalog

Maximum Image Upload Size (KB)

#### 4.4.3 Service

Services are presented to users within the Service Catalog via a configurable hierarchy. Each service can be defined to contain a variety of information to ensure users fully understand the service offering, its pricing and service levels. A service can additionally be configured with an end point from a choice of standard actions, allowing a request to be raised, if appropriate. Available actions include request form, bundle or various views of a supplier catalog.

New services can either be created or imported via the Service link / drop list on the main Administration page. When a service is created or imported it always starts with a primary status of "Draft". Whilst the service is at *Draft* status, an additional sub status can be assigned to denote its specific stage in development. Draft services are not visible by end users and can be therefore changed multiple times without impacting what users see. When ready to publish the service, select *Make Live*, and the service will appear in all the associated categories. Once live, the only changes that can be made to a service is to change its category linkage or whether it should be additionally displayed at top level. A new *Draft* version of a *Live* service can be taken at any time, leaving the Live service visible and unchanged to users. When ready to replace the *Live* version of the Service, select *Make Live* again. This will automatically replace the existing live version.

**Related Topics:**

[Catalog](#)

[Bundle](#)

[Request Type](#)

[Approval](#)

[User Group](#)

[Data Import](#)

[Theme](#)

#### 4.4.3.1 Adding a Service

Select *Service* > *Add* from within the Service Catalog category or create one / multiple services first via *Service* page.

A service can be informational only, requestable only or both informational and requestable. Each service can contain several sections of data when viewed through the Service Catalog, including a name and description. If only the service name is completed, and the service is also requestable, only the requestable end point is displayed to the user; if more information is available about the service, it is denoted by an 'information' icon, adjacent to the service name when displayed in the category detail page.

It is important to associate an image to a service to create a visually more appealing display; ideally this should be square and will be displayed as 100 \* 100 pixels. It will be resized if necessary, maintaining the aspect ratio. The URL of a selected image is editable. A number of images are available out-of-the-box, but an administrator can also upload their own. Note: image scaling can cause a performance hit so best practice is to load images of the correct size. Where icons are over twice the maximum size, a warning message will be displayed.

Within the Category Edit feature, an optional flag allows services within the category to be displayed tiled, like an 'app' or 'web' store look. Solid background images display best in this mode.

The Service Type (Technical, Business, Customer, System or Configuration Item), Criticality (Business Critical, Mission Critical, Operational or Administrative), Group (allowing demarcation of services), Owner (selectable user or group) and Version are all summary level service information visible to the user.

The Review Date, for admin use only, indicates when a service should next be re-appraised. The Service Status denotes the stage that a Service is at during the build process, whilst at an overall *Draft* status, which is not seen by users via the Service Catalog. Once created and ready for deployment, a service is made live so that users can see the information via the Service Catalog.

Additional attributes can be associated to a service via the Attributes section and any Keywords for searching can be entered into Search Keywords section. Spaces should separate multiple keywords.

Price and SLA Service information can be included under each of the appropriate tabs on the Service creation screen.

Parent and child services can be created in the Dependencies tab. This allows inclusion of services that are dependent on the current service and also services that the current service is dependent on. Note that if a single service is imported, any dependent services must be available, at the required version. Best practice suggests that any associated services are checked prior to go live.

By default, all users will be able to see the service within the Service Catalog, but the Access tab can be used to limit access using User Groups; this can be by 'showing for' or 'hiding from' specific user groups. Any category or service can be restricted in this manner and access is inherited via the hierarchy. 'Sharelink' and 'Related Services' (i.e., Dependencies) are also subject to the same rules, but additionally, can also be viewed if the service is not part of any category.

In the Action tab, a service can be flagged as 'Service can be requested' and an end point associated from the following list:

- Request Type
- Bundle
- Item
- Supplier
- Full Catalog Search
- Off Catalog

Selecting an end point type allows a previously created end point to be associated, although new request types can be created during the linkage.

The Category tab allows the service to be associated to one or more category within the Service Catalog, by means of a tree view structure. There is also a facility to designate the service as one which will be displayed as part of the top-level category on the home page. Only data within the Category tab can be edited for a *Live* service.

#### **4.4.3.2 PunchIn to a service**

Once created, live services can be accessed directly from an external source using the punch-in feature. This can be configured by copying the value in the "Share Link" field on the Service Summary page and pasting into the source location, e.g., a web page or email. On accessing the link, a user will be authenticated by Front Office, either automatically, if integrated security mode is enabled, or via the log-in page. Once authenticated, the user will be routed to the specified service. Alternatively, the user can be directed to the requestable action by appending '&autoaction=' to the end of the Link URL, e.g.: <http://FrontOffice60/PunchInHandler.ashx?pt=scs&sid=QVm4Nu32mkS77QQC1BZVdg&autoaction=>

This link cannot be used for Single Sign-On configurations out of the box. Please contact the support team via the Community at <http://community.biomni.com/home> for further information.

#### 4.4.3.3 Editing a Service

An existing service can be accessed via the Service list or from within the Service Catalog, if already associated. Actions on a service are available 'View' link within the Service Catalog category. Each existing service can be edited via the 'EDIT' option shown against the Service Name.

Existing services can be used as a basis for similar new services by using the Copy facility; they can then be edited as appropriate and made live.

An existing service can be accessed either directly in the Service List page or, if already associated, from within the Service Catalog. A number of actions are available via a drop list on the service name: *View*, *Delete*, *Retire*, *New version*, *Unlink* and *Copy*.

A Draft service can be made live, which automatically replaces the existing live version of the service if it exists, and a live service retired.

## 4.5 Notice

Notice functionality allows posting of alerts or information to be displayed on the home page, for a specified period, to some or all users. The notice will be displayed in news- ticker style, in scrollable format; clicking on a specific notice expands to the detail.

Once clicked, the notice is displayed in rich text format, or the user is routed through to a predefined URL. Both types of message type (alerts or information) can be themed in *Admin > Settings > Theme*.

A notice can be restricted to a user group or be visible to all users; a title or plain text summary text can be entered for display in the news ticker (if both entered, only Summary text will be displayed in the ticker); Full Description with optional image (rich text long description click through) or URL (internal or external to system), with optional external reference; start date / time and end date / time; activation flag (useful for regularly repeated messages).

A news ticker style preview is displayed on the Notice maintenance list page.



## 5.0 Organization

The Organization section contains access to those areas relating to your organizational data that will form the basis for the system set up. The system can be designed to incorporate users who will be able to access the system to view and request products and services. Access profiles and user groups enable separation of users into logical segments and restrict the areas that are of no interest to them, making the user experience both easy and relevant. Division and Cost Center separation can be used to enable request costs to be reported against each area of your business.

For information on configuring Front Office please see the additional Multi-Tenant Solution Guide.

<p><b>Related Topics:</b></p> <p><a href="#">Access Profile</a></p> <p><a href="#">Address</a></p> <p><a href="#">Division</a></p> <p><a href="#">Cost Center</a></p> <p><a href="#">User</a></p> <p><a href="#">User Group</a></p> <p><a href="#">Reports</a></p> <p><a href="#">Data Import</a></p>
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### 5.1 Access Profile

An Access Profile determines which functional areas a user can access. Customized profiles can be created by grouping any number from a list of more than 30 Access Rights; each user on the system is then assigned the appropriate access profile to control what they can access and the actions they can perform on the system. Any number of Access Profiles can be created to provide a full range of access options and customer created access profiles can be edited or deleted.

The system provides two shipped access profiles: ‘Supervisor’, which has all access rights assigned, giving full access to all the system and ‘Default Access Profile’, which gives basic access for a standard user. The default user access profile is editable.

To create a new access profile, select *Access Profile > Add*, within the Organization category. Allocate an ID then create the Access Profile Name and Description. Access rights can be linked in the adjacent tab by clicking on the Access Right Name (hyperlink) and the access right will move to the *Linked* section. Moving the mouse over the Access Right Name gives a fuller explanation of the access right.

A list of all Access Rights and their Descriptions can be found in the *Support > Documents* folder: *System Settings List*.

**Related Topics:**

[User](#)

[Data Import](#)

## 5.2 Address

Delivery and invoice addresses can be included in the request process via request field association of two shipped fields: Delivery Address and Invoice Address. Additional 'address' type request fields can also be created and both address types will be available for selection. An address can be designated as the Organization default address via standard Request Field defaulting and a user can also be assigned an exception default address, set via the User Maintenance option.

A default address will be determined via a hierarchical search: User > Organization. If no value is found at either level, then no default address will be shown but a user can select an address from the standard address picker within the request.

Addresses can be created or updated via the user interface or imported using a [CSV or Unicode text file](#). Existing Addresses can be edited or deleted.

The quick search option is a wildcard search on the Address Name and all address lines plus zip code. Additional filters allow restriction by Address Name and by delivery type.

**Related Topics:**

[Creating a new Request Form](#)

[Data Import](#)

### 5.2.1 Creating an Address

To create an address via the user interface, select *Address > Add* option within the Organization category. Each address created needs a unique code for identification. An address can be designated as only available when a specified supplier is included in the request; likewise, when the Requested By or Requested For user is part of a specific division on the system. A delivery or invoice address (i.e., shipped 'system' field) can be designated 'editable' if the requester can free text enter a location.

### 5.2.2 Editing an Address

Addresses can be edited by selecting *Address > View* within the Organization category. If addresses have been downloaded to Front Office from an Integrated Supplier, they will not be editable.

An address can be deactivated, which will prevent it being displayed for end user selection. Any request field or user field default associations must be manually updated, although validation will ensure an inactive address is not submitted on the request.

### 5.2.3 Setting an Address Format

An Address Format by country can be configured from *Organization > Address > Address Format*. This is particularly useful if requesters can enter free-text addresses. The number of address lines can be configured, as well as any mandatory elements.

## 5.3 Division

A Division is used to filter access to previously created requests and restrict cost centers shown to users within the request process. A Division consists of a group of Cost Centers and needs to exist **before** any Cost Centers can be created; at least one division must exist. The system is shipped with the single *General* Division, which can be used if no other divisions are required.

Divisions can be created via the user interface or imported using a [CSV or Unicode text file](#).

The quick search option is a wildcard search on Division Code and Division Name.

To create a division, select *Division > Add* option within the Organization category. A new Division must be given a unique code and a name for identification. A division may be edited by selecting the *Division > View* option. Click on the Division to be edited from the list displayed. Divisions can only be deleted where no associations to other data exists.

#### Related Topics:

[Cost Center](#)

[Data Import](#)

## 5.4 Cost Center

Each user on the system must be associated with a Cost Center. This allows the costing of requests to be placed against not only a user but also their Cost Center. A Cost Center can be created for each department / area within an organization. A group of Cost Centers form a [Division](#).

**Note: every request must be associated with a user / cost center combination. The system is shipped with the single General cost center, which can be used for users if no other cost center functionality is used within a customer organization.**

Each Cost Center requires an assigned Cost Center owner, selected from the users on the system. The owner is established as a failsafe for any totally incorrect request type approval configurations and will not normally impact on the Approval routing relating to the Cost Center. Approval configuration is covered in further detail within the [Approval](#) section of this guide.

Cost centers can be created via the user interface or imported using a [CSV or Unicode text file](#).

The quick search option is a wildcard search on Cost Center Code, Cost Center Name, User Name, or Division Name. A checkbox allows deactivated Cost Centers to be included in the search.

To create a Cost Center on the system via the user interface select *Cost Center > Add* option within the Organization category. Cost Center names and owners can be edited by selecting *Cost Center > View* within the Organization category.

A Cost Center code cannot be edited; if the code is incorrect a new Cost Center must be created, and the incorrect cost center deactivated so that it can no longer be selected when creating new requests. Historical requests using this cost center will continue to be available and both active and deactivated cost centers are available in Request List Advanced Search.

Cost Centers can only be deactivated if they are not associated with a user.

**Related Topics:**

[Division](#)

[Approval](#)

[Data Import](#)

## 5.5 User

All Users requiring access to Front Office or used in the request process must exist in the system. The User Maintenance area is available to maintain individual user settings that control access permissions, account status, user default values, associated divisions, user group membership and request field default values.

It is also possible to change the user's password and set 'out of office' approval backup from the User List. Normally an approver would configure 'out of office' details in their About Me page but an administrator could set up the details here if the approver has forgotten to do so. Access to About Me is controlled by an [access right](#).

Users can be created via the user interface, imported using a [CSV or Unicode text file](#) or imported from [Active Directory](#). Active Directory imported fields include User ID, User Name (choice of mapping from

AD Full Name or User Name), and Email Address. An import profile can contain one or many organizational units or groups. A profile can be assigned a cost center, an access profile, a language, and a status. The profile can be assigned to one or many Front Office user groups (which must already exist).

The quick search option is a wildcard search on User ID, User Name, Email address and User GUID. Additional filters within the search are Status and Access Profile. Activated status also includes the statuses: Account Locked, Expired and Password Reset.

### 5.5.1 Creating a User

To create a user via the user interface, select the *User > Add* option within the Organization category.

#### Settings tab

Each user must have a unique user ID which is used to access the system. Additional fields required are User Name, Email Address, Cost Center, Status, and Access Profile; the latter determines the areas of the system to which they will have access. A valid email address is used primarily to send automated emails to the requester or request approver.

Three statuses are available when creating a user: Activated, Deactivated and Dormant. The Dormant status can be used for users who only need to be recognized as 'Requested For' users in the request process but will not actually ever login to the system. Dormant users can only be created; activated users may not be moved to that status.

***Note: A user must have an 'activated' status before they can be selected within the Approval Matrix.***

Other settings include language, time zone and currency defaults; the user may edit language, time zone and currency settings from within My Account, if System Configuration Settings allow. IT is also possible to maintain some core data which will be referenced by the approval matrix: Line Manager and Approval Level of the user.

On creation of a user, a system generated user Globally Unique Identifier (GUID) is created. This value is used through the core database tables and, in isolation, is not identifiable as belonging to a specific user.

If entry to the system is via the login page, new users should use the *Forgotten Password* functionality to determine their password.

Other tabs are available to set additional user information:

#### Divisions tab

Divisions listed here are used for determining which requests are available under the *View All Requests* access right and for restricting the cost centers that can be selected when creating a request. The parent Division of the user's associated Cost Center will be "selected" as default, but other divisions can be selected.

### Groups tab

User Group membership for the user is managed here. A user can be linked or unlinked to groups.

### Defaults Tab

The Defaults tab enables user defaults to be set against the request fields used in request types. This ensures easier request completion for users by defaulting their specific information into request fields and so avoiding retyping for each request raised, e.g., contact email address, contact telephone number etc. The associated Request Field default is displayed for reference.

### Integration Tab

If an Integration Setting (*Admin > Settings > Integration Settings*) has been designated as overridable for or by a user, the setting will be displayed here. The Integration Setting may have been designated as accepting only pre-defined values.

## 5.5.2 Editing a User

All user details can be edited via the user interface by selecting the *User > View* option within the Organization category.

Should a user's ID need to change then it must be managed carefully, and consideration should be given to outstanding requests and assigned approvals. Although the User GUID is used throughout the database, all touchpoints to external systems are likely to still use User ID, so a change to this field may impact in-flight requests.

If the user has locked their account after too many unsuccessful login attempts, their account may be reset by selecting the 'Activated' status.

Deactivated users may be 'anonymized', to allow compliance with the EU General Data Protection Regulation (GDPR). This action will reset the User ID, User Name and Email Address fields to the User GUID, and can be done via the User List or by means of the scheduled task. This task uses the System Setting (*Number of days before deactivated users will be anonymized*) to determine which deactivated user to consider.

## 5.5.3 About Me

The *About Me* link on the menu bar allows users to amend certain settings.

The user can change the language Front Office is presented in, assuming more than one language is available, and the user is given permission to change (via system setting). The currency in which prices are displayed can also be changed, depending on whether exchange rates are maintained for Front Office; data will always be stored in the system base currency and converted only for display. The time zone which reflects the user's location can be edited, if the user is given permission, via system setting; the user's time zone should be accurate as this affects how data is saved i.e., data is stored in UTC.

The user's default delivery and / or invoice address can be amended if the appropriate access rights have been granted.

If any Integration Settings have been designated as 'editable by user', they will be displayed here. Valid values are typically included also.

The user's 'out of office' date range and substitute assignee can also be set here. This practice should be encouraged where the user is a nominated approver or fulfillment task assignee, so that workflows can move quickly. The user can request to still receive notification emails during the out of office period. Note: 'out of office' substitution is only made once the approval stage becomes active, i.e., once previous stages are complete.

The user can also change their password here, assuming they can remember their existing password. If not, the *Forgotten Password* facility on the login page should be used, or if that is not possible, an administrator can change a password via User Maintenance.

Exceptionally, where a list has been filtered by the user, e.g., Request List or Inbox, and the data becomes invalid for whatever reason, the saved filter / search parameters can cause the list page to time out and crash. If this occurs, the user can be instructed to click the *Clear Searches* button. This would allow work to continue.

**Related Topics:**

- [Access Profile](#)
- [Cost Center](#)
- [User Group](#)
- [Approval](#)
- [Currency & Exchange Rate](#)
- [Password Controls](#)
- [Data Import](#)

**System Configuration Settings:**

- Enable Multi-Currency in catalogs / requests

Enable user selection of Time Zones  
 Enable users to select preferred Language  
 Maximum number of records to show in list views  
 Number of days before deactivated users will be anonymized

## 5.6 User Group

The purpose of a User Group is to allow easy linkage of a number of users to specific areas within the system, including access control of categories within the Service Catalog, Service Catalog end points, specific [Bundle](#), [Request Type](#) or [Reports](#). Additionally, user groups can be used in an approval stage, to allow faster approval resolution.

Any number of User Groups can be created, and users can belong to many groups. Use of multiple groups can provide ultimate flexibility for each relevant functional area. The quick search option is a wildcard search on User Group Name.

User Groups can be created via the user interface or imported using two [CSV or Unicode text files](#) User Group and User Group Members.

### 5.6.1 Creating a User Group

To create a new user group, select *User Group > Add* option within the Organization category. Each user group must be given a unique ID and a name, then (active) users can be linked to the group via the popup selector,

The *Can See Full Catalog* checkbox is only used within the [Approved List](#) feature.

Users Groups can be edited as required via *Organization > User Group > View*. Groups in use, e.g., Service Catalog, Approval, Request Type, Bundle, Reports; cannot be deleted.

**Related Topics:**

[Creating a User](#)  
[Service Catalog](#)  
[Request Type](#)  
[Bundle](#)  
[Approval](#)  
[Service Catalog](#)  
[Approved List](#)



[Reports](#)  
[Data Import](#)

## 5.7 Reports \*

Support for Microsoft® Reporting Services delivered reports, via an embedded report viewer within Front Office, is available. This powerful report generation tool supports wide ranging report requirements, rendered in several output formats. Some sample reports are available, and more will be added over time, although the solution seamlessly supports the addition of customer specific reports (it is assumed that measures will be considered to mitigate the impact on performance of the production server).

Reports firstly need to be registered in Front Office via the *Admin > Organization > Report* screen, where additional user group access privileges must be assigned. An access right controls the display of the *Reports* menu option to end users. All reports are visible to the Admin user or to Supervisors.

The *Reporting* tab on the Configuration Check screen in *Admin > Support* menu can be used to confirm set up information.

Please refer to the Installation and Upgrade Guide for customization guidance and details of the shipped reports.

\*Feature not fully available to unlicensed customers. Please email [info@biomni.com](mailto:info@biomni.com) to find out more information or to enquire about upgrading your license.

## 6.0 Request & Approval \*

This category enables you to define and build the specific request forms that users will see when requesting products and / or services from suppliers, as well as (internal) fulfillment rules. Many individual request forms can be created to ensure the correct information is obtained at the initial requesting step relating to the type of product and / or services required. Each individual request type can have a specifically designed approval workflow incorporated to ensure that any business and financial approval criteria is adhered to when requests are submitted, prior to the requests being fulfilled.

If request approval is required prior to fulfillment or closure, the approval module has many options to suit your specific organizational requirements, which can be configured with minimal ongoing maintenance. Approval workflows can include full approval, staging and notification roles during the workflow process. Approval rules can incorporate any combination of organizational structures, rules relating to division and / or cost center, different commodity types being requested and the financial value of requests. Approval can be designed to work both sequentially or in parallel where required, with latest catalog update options during the approval process, as well as reminder and escalation functionality at each step of the approval chain.

### Related Topics:

[Request Type](#)

[Request Field](#)

[Role](#)

[Approval Matrix](#)

[Cost Center Approvers](#)

[Position Code](#)

\*Feature not fully available to unlicensed customers. Please email [info@biomni.com](mailto:info@biomni.com) to find out more information or to enquire about upgrading your license.

### 6.1 Request Type \*

Request Types are designed to enable capture of the information necessary for you to fulfill a user's request for services. Request Types can contain line items either from a pre-determined bundle / group of items or individual items selected by the user from the available catalogs, although this setting must be specified on initial creation of the form. Designing a request type enables you to:

- Ensure that the right information is gathered on the request form within fields created from a wide range of field types
- Control how these fields are displayed to the user using form sections and column layouts, as well as many other options to present a visually pleasing form

- Determine approval routing dependent on who is raising the request and the contents of the request
- Determining workflow options for fulfillment and configuring rules for internal fulfillment
- Setting Service Level Agreement measurements
- Control who can see and / or edit parts of the requests throughout its lifecycle

Any number of request types can be designed, created, and linked to actionable services, dependent on your license.

The baked-in Miscellaneous Request type is the default system form used when ad-hoc items are selected directly from the [Catalog](#). This form can be amended by adding, removing, and filtering the [Request Fields](#) that appear within the form. This form is currently a [legacy](#) form.

Front Office request types are defined as either having request Items or not. Item request types can be associated to one or more bundles. Request types with no Items are referred to as business forms and are made up of a Header form and optional Confirm form.

Any Item request type is comprised of up to four forms, each containing a configured set of fields: Header, Supplier, Item and Confirm. The Header form is always displayed, the Supplier form is hidden automatically where not required, and the Item and Confirm forms can be optionally configured as hidden.

Some Item request types can also be automatically displayed with only a Header form. This occurs where only a single item is being requested and there are no supplier or item request fields configured. In this scenario the description of the item being requested is displayed in the space normally used to show the request form title.

A request type can also be categorized as “sensitive” if access to a completed request needs to be controlled.

Access to specific request types can be controlled by utilizing [User Groups](#).

Many elements of the request type can be [imported to or exported](#) from another Front Office system. Data includes Request Type Details, Request Fields, Rules, Role permissions, Fulfillment, SLA, and Request List Columns. The Approval Matrix is a separate import process, which must take place after the initial Request Type import. Ensure all the required approval roles have been created prior to the Approval Matrix import. Any associated Adapters or Bundles (for Item Requests) must exist prior to the import or the association will be ignored as part of the import: a warning will be shown first. A Request Type is imported as ‘deactivated’.

**Related Topics:**

[User Group](#)

[Request Form](#)

[Adapter](#)

Several system configuration settings are related to the end user requesting process and also the display of the Request Summary:

**System Configuration Settings:**

Empty Cart on Log on

Populate 'Requested For' field with 'Created By' user's name

Refresh defaulted fields when Request For user is changed

Display the Supplier page before the Item page

Only allow one Supplier per order

Give Request Number more prominence in the Request area

Allow Request Summary to be emailed

Display Request Price on Request Summary

View Requested For user's catalog

Warn Before Clearing Cart on New Request

\*Feature not fully available to unlicensed customers. Please email [info@biomni.com](mailto:info@biomni.com) to find out more information or to enquire about upgrading your license.

**6.1.1 Creating a Request Form \***

A request form provides a list of request fields for satisfying associated specific bundle of products and / or services. They can also reflect internal business use and non-catalog related services.

Select *Request Type* > *Add* from within the Request & Approval Category.

Each request type is given a unique code, a name and description. Enter the required information against the main details of the new request type. If this request type is flagged to 'include items', i.e., to be linked to one or more bundles, you are then able to link to existing or create new bundles from within the *Bundle* tab ('include items' must be flagged prior to first save and cannot be subsequently changed). A flag on the *Bundle* tab allows a restriction to be set, so that for any of the bundles associated with the request type, only a single instance and single quantity of the bundle may be present in the cart. This allow the form and fulfillment configuration to be simpler. A checkbox controls whether the end user can copy an existing request from within the Request List. Another checkbox determines whether the 'Requested For' field can be associated with a request. This would typically be used when the request must only be used by the logged-in user.

A checkbox determines whether a request type is deemed *sensitive* and hence access to the created request should be restricted. If checked, only the Requested By and Requested For users will see the request in the Request List or Inbox. Additionally, any user named in the approval route can perform a Request List advanced search, and by selecting themselves in the *Approved By* or *Currently Being Approved By* fields, to view the request. No other user, either one with administrative rights or a user with *view all requests* access right, can view the request. Additionally, individual request fields can be marked as “encrypt in database”, which allows the data to be encrypted at rest.

Note(s): (1) (user) group approval is not recommended when using sensitive requests, as only the approving individual user will be able to access the request once that approval stage is completed. (2) it is important to edit notification email XSLT so that sensitive content is hidden, otherwise the full detail will be accessible in the *Email* section in the Admin menu. (3) a ‘sensitive’ flag is included in all request-related API data, so the receiving system can be adjusted, as appropriate.

A checkbox controls whether a Closure ‘milestone’ will be created. This stage is activated once the request, approval or fulfilment milestones have completed, whichever is last. The process and content of the page are populated using a DAPI call.

Information on *Legacy Forms* can be found at the end of this [section](#). Legacy form functionality can be enabled via a system setting.

Integration via Request Update hook functionality can be configured to run at a number of points: on request creation, on change of ‘Requested For’ user, as a requester switches between each level of the request form, when the requester moves to the approval page, when a user initiates a call via the *Update* button or each time the request is loaded post initial creation. Others event milestones are on start of the overall approval process, on specific stage start and on approval completion.

Note: when creating a copy of the request, ‘Requested For’ hook is not fired. Auto population of the form with specific user related data is achieved via the ‘on request creation hook’.

Continue to work through the tabs to build the fields that will appear on the request form when presented to the user and the format in which these fields are displayed within sections and columns; the rules for roles, i.e., which fields are mandatory, hidden, or read-only, at each role stage throughout the request workflow; the approval resolution rules and the fields that are seen on the Request List display as column headings.

Additional usage statistics can be captured against a request type and referenced in reports, in the form of a monthly estimated volume sheet to allow tracking of estimated versus actual demand for a specific request type. A specific report is required to access this information; please contact the support team via the Community at <http://community.biomni.com/home> for further information.

Individual Request Types can be copied. The details copied are the same as for Request Type Import / Export: Request Details (excluding hook settings), Request Fields, Rules, Roles and permissions, Fulfillment, SLA, Request List columns; local language data is also included. The associated bundle for an Item Request Type must be manually configured post copy, as well as Approval Matrix. A copied request type is set to 'deactivated'.

**Note: The system setting (Allow ad hoc Items mixed with Bundle-associated Request Types) allows / disallows ad-hoc items being added into the cart with a bundle that is associated to a specific request form type.**

**System Configuration Settings:**

- Allow Advanced Layout options in the Request
- Allow Request Attachment
- Maximum File Attachment Size (Kb)
- Maximum Image Upload Size (Kb)
- Commodity Type Resolution
- Default Off Catalog Request Commodity Type
- Auto Generated Order Number – Length / Prefix
- Order Label auto set to Order Number
- Order No Auto Generate when
- Order No Generation Method
- Supplier PO Number Generation method
- Enable Legacy Forms functionality

\*Feature not fully available to unlicensed customers. Please email [info@biomni.com](mailto:info@biomni.com) to find out more information or to enquire about upgrading your license.

**6.1.2 Designing a Form \***

A request type is entirely independent from any other request type, removing any of the *Legacy Form* limitations of shared request fields and non-editable system fields. This decoupling also removes the need for a Request Field library.

All elements of a request type form can be copied into a clipboard, which is displayed in the *Toolbox*. Pasting is achieved by dragging it from the clipboard onto the design area. The clipboard contents are maintained until Request Type Maintenance is exited, allowing tables and fields to be copied from one request type to another.

If using the site in 'multi-language' mode, a language picker at the top of the page allows all data to be switched to the relevant language. If no translated data exists, fields will be displayed in the base language.

The shipped 'Miscellaneous' request, the default for cart-related requests, is available as a *Legacy Form*, as field filtering by commodity, supplier or item, is not yet available. Only *Legacy Forms* can currently be sent to Connecta or Supplier Gateway.

#### 6.1.2.1 Creating a form layout

\*\* See also *Forms Designs Best Practice*, available in the *Admin > Settings > Documents* folder for tips for creating attractive forms \*\*

A form is created by dragging a table, heading or field from the toolbox and dropping it onto the design area. A single column form can be created simply by just dragging the relevant field on, however using tables should be considered where side by side field layout is required or conditional rules are needed to display the fields: if all the relevant fields are encapsulated within a table, the rule definition, as well as formatting, is much simpler. Once in the design area, all elements can be moved by dragging to the desired location; this includes moving items in and out of tables.

Dragging an element from the toolbox automatically opens the property window at the base of the page. The property window contains three tabs: *Visual*, *Configuration* and *Help*, defaulted to the 'Visual' tab. The auto-open process can be suppressed at any time; this will persist until the property window is manually re-opened.

The *Visual* tab contains many formatting options, including:

- Position of label (alignment)
- Width of label (in relation to available row space)
- Width of control / height (data entry box; certain field types only)
- Top / bottom margin settings

Tables and headings additionally support:

- Drop shadow
- Border radius
- Border color
- Background color

The *Configuration* tab covers:

- Field Code

This is auto generated but editable; field codes are unique within request location, i.e., header, supplier, or item, but the same code can be used across locations, and in different request types. A field code can be amended by entering a brief label, which is particularly useful for easy identification of tables or headings when configuring Rules & Roles. If a field code is amended once established, all related rule, approval or workflow associations will be updated also.

- Field length (certain fields only)
- Default value (certain fields only)
- Adapter configuration
- Ability to encrypt field data at rest in database

The *Help* tab supports rich text Help, displayed adjacent to the field to assist the requester.

If one or more bundles are associated to the request form, fields can be added at either *item* or *supplier* level by selecting from the location drop-list at the top of the page.

A toggle to full screen mode is available for the design area, via an icon at the top right of the page. This can be useful when viewing the impact of a form.

Request fields are grouped into three general categories:

#### **Standard Fields**

- **Checkbox**
- **Toggle switch**
- **Single Line Text Box**
- **Multi-line text box**
- **Number**  
An allowed minimum and / or maximum range can be specified including maximum number of decimal places.
- **Email**  
A text box that includes a simple formatting check to validate for either a single email address or list of email addresses.
- **Hyperlink**  
The field can be presented as a read-only clickable link, using a Default value and standard field protection via 'Roles' tab, or as a requester-entered value. Basic hyperlink validation is carried out; relative URIs are supported so a website address should be prefixed as 'https://' or 'http://'. Once selected in a request, the site is displayed in a separate window.
- **File**  
A maximum file size is stipulated as a System Configuration Setting; attachments of the following file extensions are not permitted: VBS, WSF, EXE, COM, BAT, BAS, SYS, DLL, HTM, HTML and MHT.
- **Date**



The default value is not set as an absolute value but in relation to Today's date, e.g., four days after today: +4; four days ago: -4; today: 0. If only business days to be included: append 'w' e.g., +4w.

- **Time**

- **Radio button**

Useful where there is only a short list of options; an existing field can easily be swapped to *list box* mode. The *Import* function offers pre-defined values for rapid configuration; these can be edited once selected. Alternatively, the *Import* pane allows copy / paste from a spreadsheet and allows quick manual entry of multiple values. The *Import* function is currently only for base language values.

- **List Box**

Useful where there is a longer list of options; an existing field can easily be swapped to *radio button* mode. A System Configuration Setting determines how many items must be in the list before a popup picker, with quick search option, is presented, rather than a drop-list. The *Import* function offers pre-defined values for rapid configuration; these can be edited once selected. Alternatively, the *Import* pane allows copy / paste from a spreadsheet and allows quick manual entry or editing of multiple values. An *Advanced* checkbox on the base language *Import* page displays XML for all languages.

- **Password**

This field is for use when interfacing with an external site. The field value is stored in the database encrypted and will not be displayed on the request summary. It is passed out in the API encrypted and there is a separate method to manage encryption / decryption.

The field value is never written to the audit or other logs and is cleared from the database on request moving to status 'complete'.

### Section

- **Heading**

Includes a rich text editor panel, allowing extensive display options. When editing the heading display in the property window, the panel can be expanded to full screen via a toggle facility.

1, 2, 3 or 4 column tables provide several presentation styles and allow ease of formatting, as well as rapid management of rules and roles. Tables can be multi-row.

- 1 column table
- 2 column table
- 3 column table
- 4 column table

### Advanced fields

- **Requested For**

A shipped ('system') field which can only be used once within a request form. This field is available for use on any form.

- **Request Number**

A shipped ('system') field which can only be used once within a request form. This field is available for use on any form.

- **Request Label**  
A shipped ('system') field which can only be used once within a request form. This field is available for use on any form.
- **Division List**  
*Displays all Divisions*
- **Cost Center List**  
*Displays all active cost centers*
- **Approval Cost Center**  
A shipped ('system') field which can only be used once within a request form. This field allows the update of the cost center which can be utilized as an approval matrix parameter.
- **User List**  
*Displays all active users.*
- **Address List**  
*Displays both Delivery and Invoice pre-configured addresses*
- **Asset**  
An asset field retrieves assets from a source external to Front Office, using an Adapter. The assets retrieved are typically laptops, desktops, servers, mobile phones etc. The field will automatically select the asset if only one is returned, rather than displaying the search and selection screens.

First configure the External System in *Admin > Settings > External System*, then link it to the request field. Configure the following options as appropriate to the adapter: -

*Filter By User*: determines whether the User ID of the Requested For user should be sent to the external system.

*Filter 1 / Filter 2*: string data sent out to the external system. Usage depends upon individual implementation.

*Maximum Asset Selections*: used as part of request validation to control the number of assets selected.

- **External List box**  
An external list box retrieves data from a source external to Front Office, using an adapter. Any number of text and image columns can be displayed, depending upon the implementation of the adapter.

First configure the adapter in *Admin > Settings > Adapter*, then link it to the request field. Configure the following options as appropriate to the adapter: -

*Parameters*: text data sent to the external system; usage depends upon the individual implementation.

*Multi-Select*: determines whether multiple items can be selected from the data.

Once these have been set the field can be saved. This will contact the external system and return the definition of the columns that will be displayed in the external list box, as well as the

features that are enabled. The potential features available are Paging, Searching and User Filtering (i.e., one or more drop-lists for user selection).

Note 1: if Multi-select, Paging, Searching or User Filtering are enabled, the data will be displayed in the request as a pop up, otherwise it will display in a list box.

Note 2: additional data is sent to the external system so that localized data can be returned, or other data specific to the current user, and specific to the location of the field in the request, e.g., for a specific supplier, item or bundle. An information message may also be returned.

Where a pop-up box is displayed, request field help text is also shown here, as well as on the form, allowing the requester easier access to help relating to the pop up.

- **Tree View**

A 'tree view' control is based on the same principles as an external list box, with a different display. It retrieves data from a source external to Front Office, using an adapter. Any tree depth can be supported, depending upon the implementation of the adapter.

First configure the adapter in *Admin > Settings > Adapter*, then link it to the request field. Configure the following options as appropriate to the adapter: -

*Parameters*: text data sent to the external system; usage depends upon the individual implementation.

*Multi-Select*: determines whether multiple items can be selected from the data.

*Cascade Selection*: controls whether the selection of a particular node automatically selects every element below.

*Popup Width (pixels)*: allows the default width of the tree view selector popup box to be controlled, as per the known data to be returned.

Once these have been set the field can be saved. This will contact the external system and return the definition of the columns that will be displayed in the external list box.

User details, including culture, are sent to the adapter, allowing user targeted information to be returned, including localized data, as well as the location of the field in the request, e.g., for a specific supplier, item, or bundle. Images, referencing either relative or absolute URLs, may be specified in the adapter. An information message may also be returned.

Request field help text is also shown on the pop-up box, allowing the requester easier access to help relating to the pop up.

- **Panel**

Like the *Panel* category type in the Service catalog, a panel field can be used to insert real time HTML content from an external source, such as a report or website page, into the request. When this feature is used for request form completion purposes, it is advised that the field is hidden for the request summary, otherwise real time information will be used, which may be misleading or inappropriate.

- **Cart**  
Displays the contents of the cart (items) associated with the request. This displays best in a single column layout.
- **Approval**  
Displays the approval routing associated with the request. This displays best in a single column layout. It is recommended that this section is hidden for the 'read-only' role (i.e., viewing the Request Summary) and approval roles, as the information will also be available as a separate milestone. Note: this may change subject to how approval is configured to vary with request contents.

When trying to delete a request field, it will not be allowed if used in approval or workflow, with the message informing of specifics. If the field is used in a rule, a warning will be displayed, indicating that the whole rule will be deleted if the deletion is completed.

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### 6.1.3 Rules \*

By default, all fields configured will be included / displayed on the request. Creating a rule allows a field to be conditionally included / excluded or shown / hidden. 'Include' / 'exclude' determines whether the nominated field it will form part of the request or not; this option should be used by default. Exceptionally, where, for example, a back-end process updates a field that is not relevant / appropriate to the end user, 'show' / 'hide' can be used. However, on raising a request form, if the field value has already been set and the user edits the form to invoke a change of condition which results in that field no longer being relevant, the previously entered field value will not be reset.

Display rules can be created for *checkbox*, *toggle*, *radio button* or *list box* field types, i.e., rules are evaluated when values of these field types change. Available comparators are 'is / is not'.

For Item request types, rules can also be based on the commodities of the items present. For the Item level form an 'is / is not' comparator is available for the specific Item associated with the form. For all other form types (Header, Supplier, Confirm), commodity rules are evaluated based on the presence of any Item with the stated commodity.

Multiple conditions can be joined by either *AND* or *OR*, but not both. Selecting the 'action' field is achieved via a picker, which presents the form: tables, headings or fields can be selected / de-selected by clicking on the cell. The selected 'condition' is displayed with a green bordered hatched selection in the form picker and any 'actions' with a blue bordered hatched selection.

Rules can be set at table, heading or field level. Where tables are used, all descendants will also be affected by the rule. The request displayed to the requester will be adjusted to compensate for any conditional exclusions.

Tip: Once all rules have been added, it is helpful to re-sequence them to follow a logical order. This helps review and problem diagnosis.

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#### 6.1.4 Roles \*

Roles are used to determine what users can see and do at different stages of the request lifecycle, i.e., creation, approval, fulfillment tasks and viewing the Request Summary. A role must be created with a minimum of (role name and role type). The list of all available roles can be selected from within the Approval Matrix or Fulfillment tabs.

Within this tab, request editing permissions can also be associated, i.e., which fields on the request type are mandatory, hidden, or read-only at each role step. This allows the view for users with different responsibilities to be controlled, e.g., when the request is raised the Requester may be required to complete certain mandatory information but when the request is submitted to the first approver, those fields may be read-only for that approver although there may be additional fields that the approver needs to complete that were hidden to the Requester. Similarly, certain fields may be inappropriate for all users to view. The whole Supplier, Item, and Confirm forms can also be shown / hidden for specific roles.

Two non-editable roles are available out of the box: the *Requester* role, which will always be used for request creation and editing prior to submission, and *Request Summary – Read Only*, which is used to control which request fields are displayed on the Request Summary, when accessing from the Request List. This is also the default role assigned when creating Inbox Tasks within Fulfillment. Request Field visibility, as defined in the relevant Approval or Inbox Task role, is also applied to the Request Summary when that assigned user is accessing the request via the Inbox or notification email.

##### 6.1.4.1 Adding and managing a Role

A new role can be created by clicking the buttons *Edit Roles > New*. Here only a role name is set, along with two flags: the ability to edit items and edit price in the cart.

Once created, each role can have field level permissions of *mandatory*, *hidden* and *read-only* set as required. Tables are also available for quick selection; if a table is specified, any heading or request field contained within it will have the same permissions applied (this is not available for *Legacy Forms*).

A role is required when creating an approval matrix stage and an Internal Fulfillment Task.

**Note: Roles do not determine the access profile of a user within other areas of the system. These roles are only applicable to the action required / permitted during the approval and fulfillment process.**

A role may be deleted which is not linked to the approval matrix or internal fulfillment. This deletion will archive the role so it can be used when accessing historical requests. This role ID cannot be used again.

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### 6.1.5 Approval \*

Once the requester submits the request, the approval process, if configured, will be activated. A request can be set to never require approval, always require approval, or conditionally require approval, depending on the rules defined in the individual matrix records.

Where approval is a simple process, the option to create approval records in the background but not require the requester to click through the page, is available. If the approval route needs attention, e.g., a picklist is generated as part of the route, the approval page will always be displayed for the requester to action.

An escalation group can also be specified; this allows approval stages awaiting action for more than the time specified in the matrix record to be emailed with the details.

See the [Approval](#) section for further information.

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### 6.1.6 Fulfillment \*

There are three types of fulfillment available via this tab: Connecta and External Workflow, which are described in the Adapter section, and Internal Fulfillment, which is described below.

Internal fulfillment allows for a process to be defined that will be executed after the request has completed approval. This process can involve user interaction or integration with other systems. A process consists of several activities that will be executed dependent on the structure of the process. You drag and drop activities on the design surface to add new activities or to re-position existing activities.

The activities below are available.

#### 6.1.6.1 Sequence

A sequence activity executes all its children in order one after the other. It waits for each activity to complete before starting the next one. The activity does not complete until the last child activity has completed. The initial workflow process is a sequence activity.

#### **6.1.6.2 Parallel**

A parallel activity starts to execute all its children at the same time. The activity does not complete until all its children have completed.

#### **6.1.6.3 Flowchart**

A 'Flowchart' activity allows for more complex orchestration models to be embedded within a Front Office fulfillment process. Made up of standard action activity types, the flowchart activity removes the need for flow control activities and follows a traditional flowchart execution path.

#### **6.1.6.4 If**

An 'if' activity provides the ability to decide which of its possible two children is run dependent on a set of conditions. If the request matches the conditions specified then any child in the "Then" branch of the activity will be run, otherwise any child in the "Else" branch of the activity will be run. If multiple conditions are added to the activity, the configurator decides whether the result should be dependent on any or all of the conditions passing. The 'If' activity completes when the relevant child activity has completed.

#### **6.1.6.5 While**

A 'While' activity runs its children repeatedly while the request matches the condition specified. If the request does not match the condition when the activity starts, no children will run. If multiple conditions are added to the activity, the configurator decides whether the result should be dependent on any or all of the conditions passing. The 'While' activity completes when the condition is met.

#### **6.1.6.6 Do While**

A 'Do While' activity runs its children repeatedly while the request matches the condition specified. If the request does not match the condition when the activity starts, the children will be run once. If multiple conditions are added to the activity, the configurator decides whether the result should be dependent on any or all the conditions passing. The 'Do While' activity completes when the condition is met.

#### **6.1.6.7 Delay**

A delay activity waits for the time specified and then completes.

#### **6.1.6.8 Inbox**

An inbox activity provides the ability to create an Inbox Task that requires user action. An inbox activity requires a specified User, User Group, 'Requested By' user, 'Requested For' user or User from a nominated request field, to carry out the task, along with a Role. The role determines what Request fields are visible and whether the user can (or indeed must) edit the request. Also specified is the allowed duration of the task, entered in days, hours or minutes and calculated using the system level configured 'Business Time'.

Alternatively, the activity can be assigned at run time, by referencing a specific request field (code), which can be a user list, list box, external list box, text, or email field. The requester completes the designated field on request creation and the value is used when determining the fulfillment route.

When the activity runs the required user or group is emailed the Action as well as the Instructions, who must then complete the task using the Inbox Task list. The action and instructions fields support

template properties and XSLTs that will be replaced at run time (see [Template](#)). An inbox activity completes when the inbox task that is created is completed or cancelled.

**Related Topics:**[Business Time](#)**6.1.6.9 Email**

An email activity provides the ability to email one or more recipient's information about a request; recipients supported are User, User Group, 'Requested By' user, 'Requested For' user, 'user from field' or email address(s). The subject and message fields support template properties and XSLTs that will be replaced at run time (see [Template](#)). An email activity completes as soon as the email has been queued for sending.

**6.1.6.10 Web Service**

A web service activity provides the ability to call a web service on a remote system to enable system integration. The web service call is a Request Fulfillment message. If "Wait for response" is not checked, a web service activity completes as soon as the web service call has been made successfully. If "Wait for response" is checked a web service activity will wait until the Front Office (Directa) API has received a *CompleteRequestFulfilmentActivity* message for this activity.

**6.1.6.11 PowerShell**

A PowerShell activity will allow a specified Windows PowerShell script to be executed directly from Front Office. An account and password, with the appropriate rights, must be specified under which it will run. If "Wait for response" is not checked, the PowerShell activity completes as soon as the script has started. If "Wait for response" is checked, a PowerShell activity will wait until the Front Office (Directa) API has received a *CompleteRequestFulfilmentActivity* message for this activity.

**6.1.6.12 Open SLA**

An open SLA activity provides the ability to open an SLA defined against this Request Type. The SLA is specified by name, and if the SLA is already open the activity will do nothing. An Open SLA activity completes as soon as the attempt to open the SLA has completed.

**6.1.6.13 Close SLA**

A close SLA activity provides the ability to close an open SLA defined against this Request Type. The SLA is specified by name. If the SLA is already closed the activity will do nothing. A Close SLA activity completes as soon as the attempt to close the SLA has completed.

**6.1.7 SLA**

A Service Level Agreement (SLA) allows measurement of key time-based metrics in the lifetime of a request. An SLA has a duration entered in days, hours, or minutes, calculated using the system level configured 'Business Time', and can optionally notify one or more recipients (a single user, a user group, or an email address) if the SLA fails to complete within this specified duration. The subject and message fields support template properties and XSLTs that will be replaced at run time (see [Template](#)).



All SLAs associated with the Request Type will be created along with the Request. Initially they will all be pending. An SLA can be opened and closed either via the Internal Fulfillment process or via calls to the Front Office (Directa) API, i.e., via approval hook functionality during the approval process. All measurements are relative to the date and time the SLA is opened. If the SLA has not been closed after the specified duration it will automatically move to 'Failed', however if it closes before the duration specified it will move to 'Passed'.

Additional notifications can also be created for an SLA. These notifications have a duration period of days, hours or minutes, calculated using the system level configured 'Business Time, and will fire while the SLA is open either before or after SLA failure. These notifications can notify one or more recipients (a single user, user group or email address) of impending (or past) failure and can also optionally set the SLA to a 'Warn' status to show it is likely to fail soon.

**Related Topics:**

[Business Time](#)

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### 6.1.8 Request List \*

A 'Restrict Visibility' checkbox allows orchestration-style requests to be hidden from the Request List. This works in conjunction with the access right *View Restricted Requests*.

#### 6.1.8.1 Column Configuration – Request List display

It is possible to configure the columns that will be displayed in the Request List for the Request Type. Within the Request List tab, a list of available fields may be selected and an option to specify the display sequence is available; the available list is restricted to only those field types that are viable. If no columns are selected within this area, a set of 10 columns will by default be displayed in the Request List.

#### 6.1.8.2 Searching Request Fields on the Request List

It is possible to set request fields as searchable on the Request List Advanced Search. Within the Request List tab, a list of available fields may be selected for searching; these include supplier and item fields, in addition to header fields. The following field types are not available: separator, hyperlink, file attachment and asset fields. This feature is available for *Legacy Forms* only.

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### 6.1.9 Creating a Legacy Form \*

Enabling Legacy form support is via a system setting and a checkbox in the Request Type Details tab. Legacy forms can be used where:

- Request fields are required to be filtered dependent on catalog items, i.e., using a supplier, commodity code or item filter
- Request Field defaulting dependent on the requesting user is required, and the request update hook functionality is not appropriate
- Requesting users are utilizing Internet Explorer 7.

**System Configuration Settings:**

Enable Legacy Forms Functionality

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#### 6.1.9.1 Creating a New Request Field **\*\* Legacy Forms Only \*\***

Within the Fields tab, select *Create Field* to add a new field to your Request Form or use *Link Field* associate previously created fields to this request type. Listed below are all available field types. Configuration supports a rich text 'Help' field displayed as a tooltip to the end user and, for most field types, a 'Default' field value to be pre-populated, which can be overridden at user level. 'Short Name' is used as a Request List column and depending on field type, a field length must be specified. 'Export' defaults to enabled but can be unset if the field should not be available outside of the system, e.g., request hooks, workflow or Connecta™. 'Category' helps to organize fields when configuring and make them easier to retrieve. The 'Associated With' link adjacent to the 'Request Field Code' lists any Request Types with which the field is associated.

- **Address List**  
Displays both 'Delivery' and 'Invoice' addresses. Requester-editable addresses are only supported via the Delivery Address system field.
- **Check Box**
- **Cost Center List**  
Displays all active cost centers.
- **Date**  
The default value is not set as an absolute value but in relation to Today's date, e.g., four days after today: +4; four days ago: -4; today: 0. If only business days to be included: append 'w', e.g., +4w.
- **Division List**  
Displays all Divisions.
- **Email**  
A text box but includes a simple formatting check: must include @ sign and at least one full stop within the domain name area.
- **File**  
A maximum file size is stipulated as a System Configuration Setting; attachments of the following file extensions are not permitted: VBS, WSF, EXE, COM, BAT, BAS, SYS, DLL, HTM, HTML and MHT.
- **Hyperlink**  
The default hyperlink can be presented with a friendly name using the 'Hyperlink Text' field. Once selected, the hyperlinked site appears in a separate window.
- **List Box**

A System Configuration Setting determines how many items must be in the list before a popup picker, with quick search option, is presented, rather than a drop-list. List box items can be re-sequenced. List box items can be entered via the UI or imported in the Data Import facility, using a CSV or Unicode text file.

- **Number**
- **Separator Text**  
A non-textual separator bar is displayed in the request unless Default text is entered. Alternatively, separator sections can be created as part of 'Advance Form' configuration.
- **Text Box**  
Depending on the field length entered, the field will display as a multi-line entry box. Specifying the 'Number of Rows' allows control of the display.
- **Time**
- **User List**  
Displays all active users.

More complex field types are Asset and External List box:

- **Asset**  
An asset field retrieves assets from a source external to Front Office, using an Adapter. The assets retrieved are typically laptops, desktops, servers, mobile phones etc.

First configure the External System in *Admin > Settings > External System*, then link it to the request field. Configure the following options as appropriate to the adapter: -

*Filter By User*: determines whether the User ID of the Requested For user should be sent to the external system.

*Allow Fast Select*: if set, the field will automatically select the asset if only one is returned, rather than displaying the search and selection screens, e.g., if *Filter By User* is selected and the user only has one computer.

*Filter 1 / Filter 2*: string data sent out to the external system. Usage depends upon individual implementation.

*Maximum Asset Selections*: used as part of request validation to control the number of assets selected.

- **External List box**  
An external list box retrieves data from a source external to Front Office, using an adapter. Any number of text and image columns can be displayed, depending upon the implementation of the adapter.

First configure the adapter in *Admin > Settings > Adapter*, then link it to the request field. Configure the following options as appropriate to the adapter: -

*Parameters*: text data sent to the external system; usage depends upon the individual implementation.

*Multi-Select*: determines whether multiple items can be selected from the data.

Once these have been set the field can be saved. This will contact the external system and return the definition of the columns that will be displayed in the external list box, as well as the features that are enabled. The potential features available are Paging, Searching and User Filtering (i.e., one or more drop-lists for user selection).

Note 1: if Multi-select, Paging, Searching or User Filtering are enabled, the data will be displayed in the request as a pop up, otherwise it will display in a list box.

Note 2: additional data is sent to the external system so that localized data can be returned, or other data specific to the current user, and specific to the location of the field in the request, e.g., for a specific supplier, item or, bundle.

Once fields are created, they can be used across multiple request types if required. The full available Request Fields list is available directly from the Administration home page.

Each field type will prompt entry of the relevant information. Once created or associated, the Advanced Form tab can be used to control the display of the fields to users based on sections and column layouts.

**Note 1: If Advanced Form is active (as per checkbox at the top of the tab) then every field associated with the request must be selected within the advanced form definition or it will not be seen by users.**

**Note 2: It is more efficient to create new Request Fields from within the Request Type, as the new field is automatically associated with the Request Type.**

#### 6.1.9.2 Selecting a Shipped (system) Field

Several shipped request fields are available. These include 'Requested For' user, Cost Center, Request Number, Request Label, Delivery address (including support for requester-editable address), Invoice Address, Request Value, Required By date and Request Notes. The Request Field Name may be edited, and a default specified but otherwise the properties are fixed. Only one instance of a system field can be associated with a specific request type.

#### 6.1.9.3 Request Field Dependencies

Dependent fields ensure only relevant subsequent fields are displayed, depending on the selection made in the parent field. Dependent fields can only be assigned to a parent field that is a list box type.

E.g., a field labeled 'Type of Travel' has a choice of 'Rail' and 'Air'. By selecting 'Rail' fields such as Departure Station, Arrival Station and Departure Time will be displayed. However, if 'Air' is selected the fields will relate to 'Departure Airport', 'Destination Airport' etc.

Request Nested Dependent fields can be set up with many levels in a tree type structure.

**Note: Ensure all the relevant fields are available prior to creating the dependencies. Each field that is used as a dependent field cannot be used again at any other dependency level so all dependent field trees should be created from the ‘top down’.**

#### 6.1.9.4 Adding a Dependent Field to a Higher-Level Field

Select the ‘Add’ link in the Dependent Fields column of the higher-level field required. Select the Parent value to be configured. Select the required dependent (or child) fields by checking the box against the field name and then clicking on the ‘add’ link at the top of the check box column (the added fields then move to the top section of the screen). Once dependencies are added they can be re-sequenced using the drag and drop icon against each field. Defaults can also be added or edited if required. Continue to add dependencies for each of the list box descriptions as required until complete.

To continue building your nested dependent field structure repeat the above process by selecting the ‘Add’ link beside each of the fields that require further dependent fields below them.

**Note: There are no restrictions in the depth of the dependent fields’ tree.**

#### 6.1.9.5 Filtering Request Fields

It is possible for certain fields to appear within a request according to the type of product being purchased, e.g., when ordering IT equipment, certain IT fields may be relevant which would not be for a stationery purchase.

Fields can be filtered on criteria dependent upon the level of the request that the fields appear:

- Header level – commodity type filter
- Supplier level – supplier or commodity type filter
- Item level – commodity type, supplier, or item number filter.

Select the *Fields* tab within Request Type Maintenance and then select the *Add* link which appears in the Commodity Type / Supplier or Item filter column of the field to be filtered. Select whether this field is to be ‘included’ or ‘excluded’ when any of the specified commodity types / supplier or items form part of the request raised:

- Include = ANY field present
- Exclude = ALL fields present

Add the commodity types / supplier or items from the list by checking the associated box(es) and clicking on the *Add* link at the top of the check box column. The selected items will now be moved in the top of the screen.

Any commodity type, suppliers or catalog items required as filters must be created prior to carrying out the filter set up within the Request type.

### 6.1.10 Advanced Form **\*\* Legacy Forms Only \*\***

Within any request type you can activate an 'Advanced Form' option which enhances the presentation to user's raising a request: this provides one or two column layout, sectional formatting, and color themed display. The Advanced Form tab is visible when the system setting is enabled. The Advanced Form can be designed and then activated for specific requests.

*Note: Any requests using the Advanced Form option that are passed to Connecta™ will sequence the fields as they appear in the request within a single column format; the two-column layout is not passed to, or displayed in, Connecta™.*

#### 6.1.10.1 Configuring an Advanced Form

The advanced form functionality allows arrangement of fields into a single or two column format section. Each request type can contain many sections of differing formats.

Using the Edit link within each section you can assign a *Title* (and determine if a title is displayed) and *Description* bar which can be color coded using a standard set of colors provided. These colors can be overwritten using the style sheets; please contact the support team via the Community at <http://community.biomni.com/home> for further information.

It is also possible to insert sections within sections, although this is only suitable for short label / short response fields, as the layout for lower resolution browsers may be adversely impacted.


#### 6.1.10.2 Adding a Section

One section is provided within the Advanced Form tab to get you started. To add further sections, click the *Add Section* button.

A new section is added in a single column layout; to edit the section layout select the *Edit* link within the section. To add a section within an existing section, select the *Add* (request field) link and click the *Add Section* link, displayed at the top right corner of the popup.

**Note: Help is provided (?) against the Title bar and Description to assist you.**

#### 6.1.10.3 Re-Sequencing Sections

To re-sequence a Section select the  icon and drag and drop the section from and to the desired position. Top level Sections only can be re-sequenced. A section within a section cannot be re-sequenced.

#### 6.1.10.4 Adding Fields to Sections


Within the appropriate section, select the *Add* link where you want the field to appear. Select the field to be added within this section; care should be taken to insert the field in the correct position. Continue to add fields as required within your sections. All fields required to be displayed must be included in the layout.

**Note: Separator Fields, if associated within the Advanced Form, will be displayed as ‘read only field’ on the request. Text box type fields will change to a Text Area if above 50 characters in length and associated within a two-column layout; the number of rows displayed can be controlled within request field set up.**

#### 6.1.10.5 Adding Rows to Sections

Rows can be added above or below existing rows within sections at any time using the  icon.

#### 6.1.10.6 Deleting Sections and Fields

Sections can be deleted, and request fields removed by selecting the  icon to the right of the Section Title bar or the field.

## 6.2 Approval \*

If the request needs approval prior to fulfillment or closure, an extensive variety of rules and options can be designed, which should allow an organization’s approval workflow process to be mapped and automated within the approval set up. Approvers can be allocated based on the requester’s business unit / cost center, contained commodities, or any field value. Where authorized users raise requests on behalf of others, approval routing can be determined on the *Requested For* user. Support for out-of-office (substitute approvers), organizational position hierarchies (e.g., route to line manager), and integration to user account directories ensures streamlined rule management and effective approval of all requests.

*Note: a significantly more complex rules-based matrix evaluation is available (‘Advanced Approval Rules’) but this is primarily used in a legacy manner by long running customers. The default Approval Matrix option should be adequate for even the most complex business scenarios. Please contact the support team via the Community at <http://community.biomni.com/home> for further information.*

A request can be set to never require approval, always require approval, or conditionally require approval, depending on the rules defined in the individual matrix records. When a request is submitted for approval, all matrix records are evaluated, and the matching records retrieved, and specific users or groups assigned. This filtered and updated list becomes the approval route for the specific instance of the request. Each record is known as an Approval Stage. Whenever a stage becomes active, a check is made to verify if the user an ‘out of office’ record applicable for today; if so, the substitute approver is swapped in instead of the original.

If the *Remove Duplicate Approval Stages* system setting is enabled, at point of the approval route being calculated at request submission, the approval route is calculated as normal. Next, the derived list is reviewed and if two or more consecutive stages are resolved to the same user, an assessment is made to determine which single stage to retain. The stage that is retained is the first approver, or, if no approvers are found, the first stager, or, finally, if no stagers are found, the first notifier. If there is more than one stage with the same stage type, e.g., multiple approvers, the priority is determined as follows, (1) being most important:

1. Sequence

2. Role ID (alphabetical)
3. Stage type (approver, stager, or notifier)
4. List box number
5. Default or advanced matrix

Where approval is a simple process, the option to create approval records in the background but not require the requester to click through the page, is available. If the approval route needs attention, e.g., a picklist is generated as part of the route, the approval page will always be displayed for the requester to action. An escalation group can also be specified; this allows approval stages awaiting action for more than the time specified in the matrix record to be emailed with the details.

Approval task notifications (either for those required to take action or for information only) are included in a set of approval related emails which can be configured using XSLT (Extensible Stylesheet Language Transformation) so that the text in the emails is relevant to the customer's requests and processes. In addition to the notification email, a full list of outstanding approval tasks is available via the *Inbox* menu > *Approvals* list.

The Approval Matrix can be created via the user interface or imported using a [CSV or Unicode text file](#).

A detailed guide to assist configuration of the approval process is available. Please contact the support team via the Community at <http://community.biomni.com/home> for further information.

**System Configuration Settings:**

- Exclude Requested By / For from Approval List
- Route user via login page on clicking hyperlink
- Allow comments when approving
- Display Approval Submit picklists by last name
- Remove Duplicate approval stages
- "From" Mail address
- Allow Advanced approval rules

**Related Topics:**

- [Approval Matrix](#)
- [Auto Self Approval](#)
- [Approval Hook](#)
- [Approval Reminders & Escalation Reporting](#)
- [Approval Level for Users](#)
- [Cost Center Approvers](#)
- [Approval Position Codes](#)



<a href="#">Role</a> <a href="#">Email Configuration</a> <a href="#">Data Import</a>
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\*Feature not fully available to unlicensed customers. Please email [info@biomni.com](mailto:info@biomni.com) to find out more information or to enquire about upgrading your license.

### 6.2.1 Approval Matrix \*

The information contained with the Approval Matrix defines the approvers who are required for specific request types. When a request is submitted for Approval, the system references the matrix to determine the approvers needed to approve the request. The Approval Matrix can include Group, Parallel, Position Code, Request Field and Approval Hook processing. The matrix is processed by searching for ALL matching rules to derive a list of approvers required to authorize the request. Using this type of matrix makes for easier understanding and repair if a stage is missing.

\*Feature not fully available to unlicensed customers. Please email [info@biomni.com](mailto:info@biomni.com) to find out more information or to enquire about upgrading your license.

### 6.2.2 Configuring the Approval Matrix \*

Approval Matrix records can be configured from within the Request Type (*Approvals* tab) screens or via the generic Matrix available at the top-level Administration home page. High volume changes can also be edited via [CSV or Unicode text file import](#).

<b>Related Topics:</b> <a href="#">Data Import</a>
-------------------------------------------------------

#### 6.2.2.1 Core Settings

##### Request Type

An Approval Matrix must be assigned to a Request Type.

<b>Related Topics:</b> <a href="#">Request Type</a>
--------------------------------------------------------

##### Role

The selected request type determines the contents of the *Role* picklist, as defined in the Request Type > *Roles* tab. The role is used to define the actions that the approver(s) is allowed / required to perform whilst authorizing a request. A meaningful name should be used, to assist the Requester and the Approver. Select from the available list or create a new role via the *Request Type / Roles* tab.

**Related Topics:**  
[Request Type Role](#)

**Stage Type**

Defines the access level of the approval stage:

- Approval - must approve or decline a request; can also add additional information to the request if required
- Stager – reviews or edits specific information in the request; does not have the authority to approve or decline the request
- Notification – receives an email as notification only; no action is required

**Stage Sequence**

Selecting the stage type displays the Stage Sequence number, which determines where this record appears within the resolved approval route. This ensures the request passes through the approval process in an appropriate order.

**Assigned Approver**

The assigned approver picklist lists the options for the type of resolver.

**Approval Level**

Specify an approval level to enable users associated with this level to authorize the request. Approval levels should be alphabetical (A-Z), with A being the highest level.

**Related Topics:**  
[Approval Level for Users](#)  
[Cost Center Approvers](#)

**Specific User / User Group**

Select a user if a specific user is to authorize the request. Select a user group for more flexibility: all members of the group will receive an approval email and any user can approve as appropriate.

Alternatively, you can select the user who raised the request (*Requested By*) or the user for whom the request has been raised (*Requested For*).

**Related Topics:**  
[User](#)  
[User Group](#)

### User from Field / User Group from Field

Using *User from Field* or *User Group from Field* allows a request header field to be entered, of type List box, External List box (but not tree view), Text Box or Radio; and specifically for *User from Field*, type User List. This request field would be updated during request creation, either by the request creator or by an external system, and on request submission for approval, the entered value will be used as the assigned approver for that approval stage.

Note: if using External List Box, the field must be configured in single selection mode.

### Line Manager via User

A user's Line Manager can be specified against the user's details (either via User Maintenance or Import Users facility) and at request submission stage, the Requested For user's manager assigned the approval stage. This allows a simple, easy to maintain approval process.

If using Position Codes, the following options can be used:

#### ***Approval Level via Position***

By selecting the *Approval Level* and *Via Position* checkbox, the approval route calculation process will locate the position code of the user on whose behalf the request is placed and ascend the organizational hierarchy from this point. The first position code reached, where the user has been allocated the required approval level or higher, will be chosen as the approver of the request.

#### ***Line Manager via Position***

By enabling the Line Manager checkbox, the approval route calculation process will locate the Position Code of the user for whom the request is placed and then ascend the organizational hierarchy to the user's line manager. The line manager will be the sole approver of the request.

***Note: if a position is vacant the process will continue to search up the tree until a filled position is located; the user associated with that position will be the approver for the request.***

#### ***Position Code***

A specific position may be selected, and the associated user included in the approval route calculation process. If the specified position code is vacant, the organizational hierarchy will be ascended until the next filled position code is reached and the request will be assigned to the associated user.

#### **Related Topics:**

[Approval Position Codes](#)

### Approval Hook

An Approval Hook allows a link out to an external system, which may approve or decline a request, add items, and update field information on the request, or which may merely be passed the request details for notification purposes. It may be selected as a matrix action from a list of active Hooks set up via the Adapter area. An Approval Hook can work alongside standard approval matrix rows set up in Front Office.

**Note: if communication with the external system fails for a request, a supervisor may approve or decline the approval stage via the Approvals List.**

**Related Topics:**

[Adapter & Request Hooks](#)

**Request Value**

By default, the *Any Request Value* checkbox is enabled, which means that the matrix record will be applied, regardless of the value of the request. If specific value bands are required, uncheck the box and *Minimum* and *Maximum* request values can be entered.

**6.2.2.2 More Settings**

**Approve in Parallel**

By default, the approval route operates in a series of sequential stages: each approval stage must be complete before the next stage is activated. If you wish for more than one stage in the matrix to be started simultaneously (i.e., in parallel), then each relevant matrix record should be checked. The parallel group will consist of consecutive parallel records; a 'sequential' (i.e., nonparallel) record will end the grouping. An approval flow can have several groups of matrix rows set to parallel approval.

**Note: it is inadvisable to use Approval Recalculation in association with Parallel approval.**

**Approval Recalculation**

If the approval route needs to be verified during the approval process, perhaps for example the model / price of the requested items is amended or a cost center is changed, enable the 'Recalculate' checkbox. The comparison of the current route and the new route checks that the number of stages, the Role ID, and the resolved user type (e.g., user group for both current and new) are all unchanged. Also, that the designated user is still valid. Where multiple users are potential approvers (i.e., a drop-down list), a check will ensure that the current user can still be an approver in the new route; if so, that user is retained. If any of the above does not match, the route is designated as changed and the approver will be presented with the recalculated list of approvers; the current approver needs to accept the page. If no differences to the approval route are determined, then the approval process carries on uninterrupted, transparent to the 'recalculating' approver.

If the approver verifies the recalculation, the approval route is reset, and the approval process restarted. An audit record is created to denote the recalculation and the original approval route effectively 'archived' for support purposes only.

### Remove Expired Products and Update Pricing

If only the most up to date catalog data can be submitted, enable the 'Remove Expired Products' and / or 'Update Pricing' checkboxes. Prior to an approver with these options enabled being presented with the request, the catalog will have been checked for updates and the request changed accordingly, i.e., items deleted, end dated products removed and prices amended. The approver is informed of the details of the changes (and a tooltip specifying the affected products displayed) and given the choice to proceed (i.e., approve the request), or ignore the changes (i.e., decline the request). Assuming the approver has the rights to edit the contents of the request, as per the role rights, they will be advised to replace removed products, if required.

Any changes applied take effect prior to approval recalculation logic being called. If the item is marked as 'price editable' then no price changes will be assessed; PunchOut products will also be excluded. This check cannot be implemented for notification role types or for Approval Hooks matrix rows. If the request is declined, no changes are applied. An audit record reflects the changes made.

### Skip stage if no approvers found

This feature allows a matrix row to be skipped if there is no user or approval hook available. If all stages for the request type are skipped in this manner, no approval will be required, and an appropriate audit comment logged. It also needs the "Request Requires Approval" field (found on the Approval list) to be set to either "Yes" or "Only if approvers found". If "Request Requires Approval" is set to "Yes", at least one approver must be found for the request; if set to "Only if approvers found", then the whole approval stage may be bypassed if all stages are optional and approvers are not found.

If the matrix row is flagged as optional for an *Approval Level*, and no Approval Level user can be found, the stage will be skipped rather than be set to the Cost Center Owner. Dormant or Deactivated Users will be skipped. Deactivated adapters or adapters of the wrong type will also be skipped. If the 'optional' stage resolves to an invalid user, then the request will error, regardless.

### Matching Criteria

#### Fields

Request fields can be used to determine whether a matrix is matched to a request. Any number of text, number, list box, or radio button request fields may be specified including the same field with many matching values, with the option to match 'any' or 'all' fields. A value must be entered against field selected, with the choice of the following operators, dependent on field type:

Text:	equals, contains, or does not contain
Number:	equals, not equals, less than or greater than
List box:	equals or not equals
Radio button:	equals or not equals
External List box:	equals, contains, or does not contain

Note: Tree view fields are not supported.

**Related Topics:**  
[Creating a new Request Field](#)

**Commodity Type, Division, Cost Center selection criteria**

A *Commodity Type*, *Division* and / or *Cost Center* can be used to determine whether a matrix is matched to a request using the specific filter. No selection results in all records being included.

**Related Topics:**  
[Commodity Type](#)  
[Division](#)  
[Cost Center](#)

**Reminders & Escalation**

Approval Reminder and Escalation periods can be set, using the specified number of days, hours or minutes after the original approval email was sent to the approver; ‘Business Time’, as configured at system level, will be applied to the calculation. Both fields are optional but if completed, can trigger a reminder email only, an escalation email only or both.

**Reminder Email**

An email reminder is sent to an approver who has yet to action an approval request.

**Escalation**

An email is sent to an ‘escalation’ user group when a stage has been open beyond a designated period. The email includes details of the assigned approver or group, with group members listed. The Escalation Group is specified against the Request Type or, if a global value is acceptable, as a System Configuration setting).

The main body of both emails contains the same request level information as the original approval emails. The emails can be configured using XSLT (Extensible Stylesheet Language Transformation).

**Related Topics:**  
[User Group](#)  
[Email Configuration](#)  
[Business Time](#)

**System Configuration Settings:**  
 Default Approval Escalation User Group

## Grouping & Sequence

Lastly, sequencing can optionally be set:

### **List box Number**

If it is required that more than one approver should approve a certain criterion of request, then a List-box Number should be specified. The List-box Number defines whether Approval is required from any of the people (across matching matrix records) or all of them. If any single user can approve, then the List-box Numbers should be the same across all records and those approvers will appear in a drop-down list from which the submitter can select the desired user. If the List box Numbers are different for otherwise matching records, multiple approval stages will be created.

### **Priority within List box**

If there is a certain preference required for the order in which the approvers appear in the list-box, this can also be specified using this numeric value (1 = first in the list).

\*Feature not fully available to unlicensed customers. Please email [info@biomni.com](mailto:info@biomni.com) to find out more information or to enquire about upgrading your license.

### **6.2.3 Editing an Approval Matrix \***

Approval matrix lines can be edited to change the criteria either via CSV or Unicode text file import or via the user interface.

\*Feature not fully available to unlicensed customers. Please email [info@biomni.com](mailto:info@biomni.com) to find out more information or to enquire about upgrading your license.

### **6.2.4 Approval Level for Users \***

Approval Levels that exist within the Approval Matrix must be associated with one or more Approvers so that when the matrix matches a line which incorporates a level, it can then reference the cost center of the request (via the Requested For user) and locate the relevant level of user who is specifically associated to that cost center for this purpose. If it cannot find an exact match, it will look for any appropriate users of a higher Approval Level.

A user is assigned a level within *User Maintenance > Settings* tab. The list of available Approval Levels reflects what has been created in the Approval Matrix.

#### **Related Topics:**

[User](#)

[Cost Center Approvers](#)

\*Feature not fully available to unlicensed customers. Please email [info@biomni.com](mailto:info@biomni.com) to find out more information or to enquire about upgrading your license.

### 6.2.5 Auto Self Approval \*

Once the approval route has been calculated on request submission, this feature allows the first approval stage of the request to be automatically approved if the *Requested By* user is included in that first stage.

**System Configuration Settings:**

Allow Auto Self-Approval

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### 6.3 Cost Center Approvers \*

When using Approval Levels within the Approval Matrix (independent of Position Code resolution), you will need to associate the users who can be approvers with the Cost Centers. Cost Center approvers are maintained via a CSV or Unicode text file import.

**Related Topics:**

[Data Import](#)

\*Feature not fully available to unlicensed customers. Please email [info@biomni.com](mailto:info@biomni.com) to find out more information or to enquire about upgrading your license.

### 6.4 Approval Position Codes \*

Your organizational hierarchy can be represented within the system using Position Codes. Each Position Code is unique and is used to classify the relative position of a user within your organizational hierarchy. Position codes can be utilized in the approval process to route approval to:

- A specific employee identified by a position code
- A line manager (without having to identify the user id or position of that line manager)
- An employee of specific level of authority where that employee is determined from the organizational hierarchy OR the designated cost center approvers.

Every user within the system is required to have a position code assigned, with the relevant hierarchical code stipulated. The hierarchy is usually stable, with only the users potentially moving as career progression / organizational changes require. Position Codes can only be created via a CSV or Unicode text file import.



A dummy position code to sit above the top user (e.g., CEO) in an organization is required to be specified in a system configuration setting; an additional setting specifies the user ID of the approver of requests raised by the top user.

**Related Topics:**[Data Import](#)[Approval Matrix](#)**System Configuration Settings:**

Resolve Request Approver(s) via Position Codes

Highest Position Code User ID

Highest User's Parent Position Code

\*Feature not fully available to unlicensed customers. Please email [info@biomni.com](mailto:info@biomni.com) to find out more information or to enquire about upgrading your license.

## 7.0 Supplier, Catalog & Bundle

Supplier Catalogs provide a means of presenting users with options within service requests and allow authorized users to raise purchase requests within Front Office. Supplier catalogs can be presented to users, either in their complete searchable / browsable format via the full catalog view or embedded within defined bundles. A catalog must be associated to a supplier and a basic set of data can be imported via the import facility. A supplier’s catalog can be managed locally in Front Office either via manual entry or by using the catalog import facility. Additionally, Supplier Gateway allows a more extensive set of catalog data to be published. It also provides suppliers with a self-service catalog upload / publish module and an automated catalog update option.

Any number of suppliers can be created, some of which may have a catalog and others may be used for off-catalog (free text) requesting only. Other suppliers may be configured as hosting their catalog externally and users connect by ‘punching out’ to shop and retrieve items back into Front Office. Suppliers can be imported via the Supplier Gateway tool along with a catalog that is uploaded via [CSV](#) or [Unicode text file](#).

Catalog items can also be grouped into Approved lists, which restrict the view by User Groups, enabling the system to show only those catalogs and suppliers that may be relevant to a set of end users, rather than the entire supplier and catalog lists.

Commodity types, linked at supplier or item level within the catalog, can drive field filtering on the request type and / or approval workflow. A commodity type can also be mapped against a product type that is assigned to catalogs that are imported via the Supplier Gateway.

The Service Catalog also allows a specified supplier catalog, item, or bundle to be accessed.

<p><b>Related Topics:</b></p> <ul style="list-style-type: none"> <li><a href="#">Supplier</a></li> <li><a href="#">Catalog</a></li> <li><a href="#">PunchOut to an External Catalog</a></li> <li><a href="#">Off-Catalog Ordering</a></li> <li><a href="#">Bundle</a></li> <li><a href="#">Approved List</a></li> <li><a href="#">Commodity Type</a></li> <li><a href="#">User Group</a></li> <li><a href="#">Data Import</a></li> </ul>
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**System Configuration Settings:**

- Empty Cart on Log on
- Hide Price Message
- Enable A-Z Supplier filter in catalog view
- Enable Catalog Favorites List to be created
- Display Tax Rate in Price List Details
- Commodity Type Resolution
- Enable Approved Lists
- Show full catalog link on home page

## 7.1 Commodity Type

Commodity Types can be assigned to specific products or services within the catalog and / or against specific suppliers. Commodity Types have two main uses within the system:

- For use within the approval matrix to identify approvers for specific product / service requests submitted for approval.
- For filtering fields appearing on the Request forms when requesting specific products / services.

For filtering request fields, Commodity Types can also be mapped to the standard commodity code structure (UNSPSC); this globally used classification hierarchy for products and services is frequently used by suppliers when publishing catalogs via the Supplier Gateway. Assignment is via the entry of the required classification code; top level must be entered and then up to three additional levels.

Commodity Types can be accessed via *Catalog, Supplier & Bundle > More...* link.

Note: this field is still referred to as the original name of 'Purchase Type' in both schemas and the database.

## 7.2 Supplier

On viewing the Supplier List, all active suppliers will be displayed, by default; the quick search option is a wildcard search on Supplier Name, Supplier Code and Supplier Address fields. Suppliers can be deactivated either from the list or from the details page. The list can be sorted by either Supplier name or Supplier Code.

A shipped supplier record 'Unknown Supplier' allows Off Catalog requests to be raised when the supplier is not known. The display of this supplier in the Off-Catalog page can be controlled via a system setting.

### 7.2.1 Creating a Locally Maintained Supplier

To create a supplier on the system, select *Supplier > Add* in the *Supplier, Catalog & Bundle* category. Each supplier requires a unique code (alphanumeric and underscore supported); this is automatically prefixed with an 'X' if created in Front Office – denoting a locally maintained supplier. Many settings are available within the Supplier Maintenance screen, including:

- Supplier currency - active currencies displayed
- Commodity type - standard and off-catalog items
- Category levels - for catalog; 0-5 valid
- Contact method - for request submission to supplier (e-procurement solutions)
- Off catalog requests accepted
- File attachments on PO - email-only contact method
- Address & contact details

### 7.2.2 PunchOut to an External Catalog

A requester can access an external supplier website to select products and add these products to the Front Office cart. The external website can be accessed via the Service Catalog or via standard catalog browsing (denoted under an *External Catalogs* category). PunchOut parts can be created in Catalog Maintenance and be linked to the Service Catalog. The destination supplier site is configured via the PunchOut tab within Supplier Maintenance for locally maintained suppliers, but registered suppliers must be hosted on Supplier Gateway v5.00 SP1.

If the user experiences any problems, e.g., unsuccessful connection to the external site or the item retrieved in an unknown currency, a friendly message will be displayed. Further diagnosis is available through the *PunchOutLog* option within the Support > Other Logs screen, where the full outbound and response cXML is available. Any errors are also reported in the [Error Log](#), as well as via [Other Logs](#).

### 7.2.3 Editing a Supplier

Suppliers created within the Front Office system can be edited at any time via the *Supplier > View* option in the *Catalog, Supplier & Bundle* category. The Supplier's currency is only editable if no catalog exists.

For a Supplier imported via the Supplier Gateway, only the Commodity Types assigned can be edited as well as the graphics path. Other details relating to the supplier must be edited within the Supplier Gateway.

**Note: A Supplier must be set up within the Front Office System before Catalog Items can be imported. The Supplier record must have a selection against 'Supplier Category Level' to enable a catalog to be created and displayed although this category level may be set to zero if the Supplier is to be used for Off-Catalog requests only.**

#### 7.2.4 Associating a Supplier Account

The Supplier Account screen can be accessed from a drop-down list against the specific supplier within the Supplier List. This allows the registration of account codes for a supplier, which will be included in the supplier orders sent to the Supplier Gateway and ensures invoices can be assigned to the correct entity.

#### 7.2.5 Associating a Product Type

Product Types provide a low maintenance facility for ensuring an updated catalog continues to be associated to a Commodity Type for request field filtering purposes. Product Types can be assigned to a product item by the supplier and imported with the catalog via the Supplier Gateway.

Product Types can be linked to a Commodity Type within the Front Office system, so that when a new product is added to the Supplier Gateway catalog file with that specific Product Type, a manual link does not need to be created to the correct commodity type. This reduces ongoing maintenance significantly.

To create this link, select *Product Type* from the *More...* link within the Supplier, Catalog & Bundle category.

Any Product Types that have been passed from the Supplier Gateway into Front Office will appear under the relevant supplier's name. Select each Product Type and select the required Commodity Type. If a new Product Type is used in a supplier catalog, then the link to a Commodity Type will be required.

**Related Topics:**

[Commodity Type](#)

### 7.3 Catalog

There are a number of ways to create catalog data for display in Front Office: in addition to publishing a catalog via the Supplier Gateway, catalogs can be created via the user interface or the main fields can be created via CSV or Unicode text file import / export facility with either manual or scheduled import.

Before a catalog can be created or imported the Supplier must be setup with at least one supplier category level. Any Commodity Types included in the import must also exist. The file includes all the commonly used catalog fields but is not a full representation of fields available in the Supplier Gateway or the Front Office Catalog Maintenance screen.

The quick search option is a wildcard search on Part Number, Part Description(s), UPC, Supplier Code, Supplier Name and Manufacturer Name. Additionally, deactivated suppliers can be included in the search. This same set of parameters is available for (quick) searching in the end-user full catalog search.

By default, an end user may enter a rating and product review for a product item, which may be deleted by an administrator. The review facility is controlled by a system setting.

Catalog name and description fields can be localized.

**System Configuration Settings:**

Enable product reviews and ratings

**Related Topics:**

[Supplier](#)

[Catalog](#)

[Commodity Type](#)

[Product Type](#)

[Data Import](#)

[Adapter](#)

[Scheduled Task](#)

### 7.3.1 Creating a Catalog Item

To create a catalog item via the user interface, select *Catalog > Add* from within the Catalog, Supplier & Bundle Category.

#### Details tab

Each catalog item created requires an item / part number, which the system suggests but which can be overtyped and a name.

Optional fields:

Additional description data (unlimited length), either plain text or HTML; a default commodity type for the supplier; an option which ensures multiple quantities added to the cart will be added as individual rows, allowing different item fields data to be entered; an option which allows items to only be displayed in bundles and not in the catalog; the product's web and manufacturer details; start and end dates (if not completed, indicates item is available for request).

App Store-specific features:

*App Store Action*: determines the process followed if the user proceeds from the Item Details popup; available options are *create request*, *open Link in new window*, *open link in same window*, *immediate download* or *disable*.

*App Store Action button text*: allows the button to be tailored appropriately from the default *Request Now*.

*App Store Action help message*: the default message which displayed on the Item Details popup. This can be overridden by text set by the on-load hook.

*App Store Download URL*: the download URL for immediately downloadable items.

*App Store usage*: a count will be incremented every time a user selects an action from the Item popup; however, this figure can be overwritten here. Popularity is intended as a guide, not an absolute. Items can be filtered by popularity in the App Store.

All App Store features can be overridden by use of the *App Store Product hook*.

Note: if importing a supplier's catalog, the 'Action' field values are 'CreateRequest', 'Immediate Download', 'OpenNewWindow', 'OpenSameWindow' and 'None'.

### Images and graphics

An icon can be set, which will be displayed at top level within an App Store, or as a thumbnail on page titles or lists. Ideally this should be square and will be displayed as 120 \* 120 pixels. It will be resized if necessary, maintaining the aspect ratio. If no icon is present, the first product graphic will be used instead, if available.

Product Graphics allowed useful visual information related to the product to be included e.g., screen shots and will be displayed as a scrolling panel on the Product Details tab, with a maximum width of 500 pixels (height is optional and the page will stretch to accommodate). Multiple Product Graphics can be included, although the maintenance screen supports additions in multiples of three pickers. When importing or exporting multiple graphics, values should be separated by a pipe delimiter (|).

The URL of a selected icon or graphic is editable.

Note: image scaling can cause a performance hit so best practice is to load images of the correct size. Where icons and graphics are over twice the maximum size, a warning message will be displayed.

Note: if importing a supplier's catalog, multiple graphics must be separated by a pipe (|).

### **Pricing tab**

Unit price; sales tax percentage; an option to allow the price to be changed once requested, either by all users or depending on approval role; an option to hide the price from display to the end user; up to five volume price discounts.

### **Attributes tab**

Product attributes can be created as name / value pairs, e.g., the name being ‘device type’ and the value being ‘Windows 7’. Multiple attributes can be created, and the same attribute can be created multiple times, e.g., another ‘device type’ entry could be ‘Windows 8’. Multiple attributes of the same name will be displayed to the user as a drop-list.

Attributes are displayed as a list for the end user in the Product Details tab for all products. As part of a Service Catalog App Store, the (distinct) attribute (names) can be displayed as a list of top-level filters; the attributes to be displayed in this way are configurable. A chosen attribute can be displayed on the top-level item tile. All attributes are searchable.

New attribute names can be created, or existing attributes re-used. Ensure the spelling / abbreviation is consistent, to prevent inappropriate duplicate entries, as each distinct attribute name could be displayed to the end user. If widespread changes are required, it is recommended that the catalog is exported and edited, before re-importing.

**Other Information tab**

Generally, information for display to end user - Quantity available in stock; Unit of measure data: base unit, ordering unit and unit of measure quantity; equivalent or superseding product; product type (for mapping purposes).

**Category tab**

Categorization structure for catalog browsing (add, edit, and delete), item assignment to category.

<p><b>Related Topics:</b></p> <p><a href="#">Creating a Service Catalog</a></p> <p><a href="#">Adapter</a></p>
----------------------------------------------------------------------------------------------------------------

**7.4 Off-Catalog Ordering**

Off-Catalog ordering can be used to request products or services from suppliers who do not have a catalog on the system or for suppliers who may not publish their full catalog. Off-catalog ordering provides a free text entry of item descriptions and part code, defaulted but can be overwritten with supplier specific product number if known. Off catalog item requests can follow an individual Approval route by applying a specific off-catalog commodity type to relevant suppliers. Off-catalog ordering can also be activated for initial request from an ‘unknown’ supplier, with an additional stage in the Approval workflow to enable a new supplier / part number to be created.

Off-catalog functionality is activated from within the System Configuration section.



**System Configuration Settings:**

Allow Unknown Supplier for Off Catalog Items

Enable Off Catalog Ordering

Net Price required for Off Catalog Items

Off Catalog Page Intro Text

Off Catalog Page Name override

Show Net Price of Off Catalog Items

## 7.5 Bundle

A bundle is a collection of items from one or more product catalogs, grouped for easy selection. The contents can be fixed or marked as optional for the requester when placing a request.

Each Bundle is given a name and a description, which can be configured with rich text formatting / images as required. Bundles can be linked to specific Request Types ensuring that when selected, the relevant request forms and approval routing rules are assigned.

A clear view is given to users where various types of item must be requested together, and a selection can then be made from any optional items within the same view.

A bundle can be imported to or exported from another Front Office system; an imported bundle will be set to 'deactivated'.

### 7.5.1 Creating a New Bundle

Select *Bundle > Add* from within the Catalog, Supplier & Bundle category.

Each bundle is given and a name, description and whether individual bundle items can be removed, or quantities edited in the cart. Bundles can also be linked to a specific user group to restrict access and a specific request type, so that a relevant request form will be launched when the bundle is requested. Images and hyperlinks can be added via the Image Manager icon within the Description field. If no product images are available, selecting 'List' will allow a grid textual view rather than the 'App Store' like display.

Once the main details are completed, items can be added to the bundle, list boxes of items can be created, and separator text can be created to format the presentation in the bundle display.

### 7.5.2 Editing a Bundle

Bundle details can be edited, and items added, changed, or deleted from bundles by selecting the *Bundle > View* option in the Catalog, Supplier & Bundle category.

### 7.5.3 Validation of Bundles

Catalog changes can invalidate a bundle, making it impossible to request by a user. A once daily scheduled task validates all bundles and emails the Support Desk of any invalid active bundles. A *Validate Now* button in the Bundle Maintenance list can also request the validation task to be run. A specific bundle will always validate on save. Invalid bundles are listed in red.

A *Replace Item* button on the Bundle List allows rapid replacement or removal of invalid or superseded items.

**System Configuration Settings:**

Maximum Image Upload Size (KB)

Email Address of Support Team

## 7.6 Approved List

An Approved List is a method of filtering access to the supplier catalog so that restricted or non-relevant suppliers / items are hidden from view from certain users. This is achieved by linking a user group to a restricted 'view' of the full catalog; access to the Service Catalog is unaffected as that can be filtered independently via user groups.

Approved Lists can be accessed via *Supplier, Catalog & Bundle category > More...* link. The Name and associated User Group is set within the first tab. Any User Groups assigned that have 'Can see full catalog' enabled will effectively override any Approved List filtering. A user may be linked to multiple Approved Lists.

The second tab allows full supplier catalogs to be linked. This means that any future catalog changes are automatically included in the Approved List. The third tab allows specific items to be associated and if selected via the supplier search or category filters, this will be a snapshot of items in the catalog at the point of addition. The Approved List will need to be manually edited to apply any future catalog changes.

## 8.0 Settings

This category includes the settings to activate or deactivate specific system functionality, adjust how that functionality will work, set up for import and export functions and auto-receipting rules.

Front Office offers many features that can be enabled if required. To enable a specific type of functionality, the System Configuration section must be selected within the Settings category. See System Configuration Settings document in the Support > [Documentation](#) folder for a full list of available settings.

**Related Topics:**

[System Configuration](#)

[Email Templates](#)

[Receipting, Returns & Asset Registration](#)

[Auto-Receipting](#)

[Adapter](#)

[Currency & Language](#)

[Scheduled Task](#)

[Custom Form](#)

[System Code](#)

[Quick Links](#)

[Business Time](#)

### 8.1 Licensing

The licensing area provides the ability to view the current license applied to the system, and to update the license once a new key has been obtained. The licensable features as well as any seat, request type or product count limits are shown in the screen. Trial license expiry times are also visible.

Please contact [info@biomni.com](mailto:info@biomni.com) for more information about extending your license.

### 8.2 System Configuration

The System Configuration area is split into logical sections, to facilitate use. Each section has system settings relating to that area which can be viewed and, in most cases, edited. Some settings are very powerful so care should be taken before changes are made. A full list of the settings available can also be found in the *Support > Documents* folder. Please contact the support team via the Community at <http://community.biomni.com/home> for further information.

### 8.2.1 User Login to Front Office

There are three different ways for a user to access Front Office: Windows Authentication, Single Sign-On, or entry via a login page. For further information about Single Sign-On, please contact the support team via the Community at <http://community.biomni.com/home>.

When user login is required, password rules can be defined to align with in-house security policies. This functionality is set up within the System Configuration section in the Settings category. A customer configured message can be displayed against the User ID field, to assist new users with their login, e.g., "Login using email address". 'Remember me' functionality can provide the re-instatement of the previous session, although as this effectively keeps the user logged in, password expiration policies may be contravened. The 'Remember me' duration should be set to a compatible timescale.

If a user is refused login for whatever reason, a non-specific message is displayed. This includes exceeding the normal number of allowed password attempts when the account is locked. The user sees the same message displayed throughout. If a user exceeds the allowed number of password attempts, they may reset their password by using 'Forgotten Password' functionality on the login page.

The user's password is encrypted in the database using a salted one-way algorithm, ensuring that passwords cannot be compromised even by database administrators who have direct access to the system's database.

**System Configuration Settings:**

- Enable 'Forgotten Password' functionality
- Force AlphaNumeric passwords
- Login Page / User ID help message
- Minimum length of new password
- Number of Previous Passwords Retained
- Password Retries Allowed
- Period of time before password expires (days)
- 'Remember Me' duration
- When Should Passwords Expire

### 8.2.2 Windows Authentication

To use Windows Authentication, users must be set up in the database with user names matching the users' domain names, e.g., dependent on the system setting, this would be either ACME\john.smith or john.smith.

Configure the *Remove Domain Name* system setting i.e., switch on if using john.smith or off if using ACME\john.smith.

Once at least one Windows user has access to the Administration area, IIS should be set as *Anonymous Authentication* and *Forms Authentication* both disabled and Windows Authentication enabled; configuration within IIS will ensure the web.config file is updated, and Front Office access changed accordingly.

The shipped 'ADMIN' user ID can only be used to access the system until Windows Authentication is configured in IIS. After that point, no manual login is available.

**Note: if using Active Directory to sync users, ensure that at least one user is associated to the 'Supervisor' access profile on initial import, otherwise access to the Admin area is compromised.**

**Note: these instructions only apply to configuration on initial implementation of the system and are not appropriate for later changes to the login protocol due to impact on historical data. Please contact the support team via the Community at <http://community.biomni.com/home> for further information.**

**System Configuration Settings:**

Set Domain Name rules for User login

### 8.2.3 Active Directory Import

Front Office can be synchronized with Active Directory for easier maintenance. Import is managed via a scheduled import task, allowing a specified time or a frequency to be specified. The schedule should reflect the full user set as any user not included will be deactivated in Front Office.

Multiple import profiles can be created, using a different source for each profile. For each profile a Front Office access profile, cost center and user account status must be specified, and the users may be automatically assigned to zero or more user groups. However, the user group must already exist in Front Office. The Front Office *User Name* can be sourced from either 'Full Name' (default) or 'Display Name.' A language may be optionally selected, otherwise the system base language will be used. An import profile can be specified by group or organizational unit, with or without 'children' included.

Import profiles will be processed from the top of the list and so can be re-sequenced as appropriate. If the same user is present in multiple profiles, only the *Imported User Fields* from the latest profile processed will apply. User group membership will be updated from all profiles.

The user specified within the Active Directory import requires the *List Contents* and *Read All Properties* rights at the root level of the domain specified to be able to search all organizational units / groups and import all users.

A system configuration setting allows control of whether the Domain Name should be pre-pended to the user ID when importing. It is important to verify the appropriate setting value prior to creating the first user accounts as a subsequent change will cause new user accounts to be created and existing accounts disabled, along with the attendant impact on accessing historical requests. The Active Directory import process uses an unchanged identifier to verify whether to add or edit an existing user record. This means that the User ID can be changed at source and be updated in Front Office during the import, with no duplication or intervention required. This process assumes that an Active Directory import has already run post upgrade to Front Office 9.1, as this will populate the User GUID, and thus allow matching on User ID change.

Exceptionally, it is possible to create locally maintained 'Front Office' users, for records not maintained in Active Directory. These users will be ignored by the Active Directory update.

**Note: if using Windows Authentication, ensure that at least one user is associated to the 'Supervisor' access profile on initial import, otherwise access to the Administration area is compromised.**

**Note: these instructions only apply to configuration on initial implementation of the system and are not appropriate for later changes to the login protocol due to impact on the 'user maintained' method. Please contact the support team via the Community at <http://community.biomni.com/home> for further information.**

#### 8.2.4 Configuring Front Office to use Federated Single Sign-On

Front Office supports Federated Single Sign-On via the WS-Federation Passive Protocol. It is implemented with Microsoft Windows Identity Foundation (WIF), and uses SAML tokens for claims transfer. However it does not support the SAML2 Protocol, SAML-P.

When Front Office is installed, it is configured with Forms Authentication requiring first login to utilize the "admin" account. To authenticate via the identity provider:

1. Create users in the Front Office database, who correspond to users in the identity provider.
2. Edit the Front Office web.config file to enable Federated Single Sign-On.

##### 8.2.4.1 Create a user in Front Office

In Front Office users are identified by their "User ID". In the identity provider users are identified by "Claims". For authentication to be successful, users in Front Office must have a User ID matching the value in one of the claims from the identity provider.

Front Office looks at the following claims when attempting to find the Front Office user: Name, Email, WindowsAccountName and UPN. Typically Name and Windows Account Name have the format domain\username, and typically Email and UPN have the format username@domain.

Users can be entered through the portal or imported in bulk, either directly from Active Directory or via a .CSV file.

## 8.2.5 Edit web.config to Enable Federated Single Sign-On

This section describes the change to web.config to enable Federated Single Sign-On:

1. Navigate to <Install Location>\WebSite
2. Open web.config with notepad, as **Administrator**.
3. Find the <modules> section and uncomment the two IdentityModel modules:

```
<modules>
  <remove name="RadUploadModule"/>
  <remove name="BundleModule"/>
  <add name="RadUploadModule" type="Telerik.Web.UI.RadUploadHttpModule, Telerik.Web.UI"/>
  <add name="BundleModule" type="System.Web.Optimization.BundleModule" />
  <!-- to enable federated single sign on uncomment the following two modules -->
  <add name="WSFederationAuthenticationModule" type="System.IdentityModel.Services.WSFederationAuthenticationModule,
  <add name="SessionAuthenticationModule" type="System.IdentityModel.Services.SessionAuthenticationModule, System.Ide
</modules>
```

4. Find the <authentication> section and change the mode to "None"

```
<authentication mode="None">
  <forms name=".DirectaTrunkAuthCookie" loginUrl="~/Controller/Kickoff.aspx?Controller=LoginContr
</authentication>
```

5. Enter the URL of the WS-Federation web site in the issuer attribute of the <wsFederation> element

```
<system.identityModel.services>
  <federationConfiguration>
    <cookieHandler path="/" requiresSsl="false"/>
    <!--authenticationType="urn:oasis:names:tc:SAML:2.0:ac:classes:Password"-->
    <wsFederation passiveRedirectEnabled="true" authenticationType="urn:oasis:names:tc:SAML:2.0:ac:classes:Password" issuer="https://devadfs.devtech.com/adfs/ls/" realm="
  </federationConfiguration>
</system.identityModel.services>
```

6. Find the <trustedIssuers> section and type in the token-signing certificate thumbprint of the WS-Federation server. NOTE: cut & paste should not be used as it may insert hidden characters into the file which interfere with the thumbprint matching).

```
<system.identityModel>
  <identityConfiguration>
    <audienceUris>
      <add value="urn:frontoffice"/>
    </audienceUris>
    <issuerNameRegistry type="System.IdentityModel.Tokens.ConfigurationBa
    <trustedIssuers>
      <add thumbprint="188bea6d636fb164afa30fb33feba38514ef0a63"/>
    </trustedIssuers>
    </issuerNameRegistry>
    <!--certificateValidation certificateValidationMode="None"/-->
  </identityConfiguration>
</system.identityModel>
<system.identityModel.services>
  <federationConfiguration>
    <cookieHandler path="/" requireSsl="false"/>
    <!--authenticationType="urn:oasis:names:tc:SAML:2.0:ac:classes:Passwor
    <wsFederation passiveRedirectEnabled="true" authenticationType="urn:oe
  </federationConfiguration>
</system.identityModel.services>
```

7. If on a test system, using self-sign SSL certificates, uncomment the <certificateValidation> element:

```
</trustedIssuers>
</issuerNameRegistry>
<certificateValidation certificateValidationMode="None"/>
</identityConfiguration>
</system.identityModel>
```

8. Save the web.config file.

If a switch back to Forms Authentication is required, e.g., to recover from a problem, the web.config file can be edited, and the authentication mode set to forms: <authentication mode="Forms">.

### 8.2.5.1 Login to Front Office

The system should now be fully configured for Federated login.

1. Close Internet Explorer and re-open
2. Type in the URL of Front Office
3. If using test certificates, accept the two certificate errors
4. Enter the credentials for the user created earlier. The user should be successfully logged in.

### 8.2.6 New User Account Requests

For user login configurations, a hyperlink labeled *New User Registration* can be displayed for allow for new user requests. A pop-up screen will display a contact email address.

#### System Configuration Settings:

Enable the 'New User Registration' link on the Home Page  
Notification email address for new user account requests

## 8.3 Adapter

Front Office provides a number of integration points for interchange of information with other systems. This section covers the adapters shipped with the product; however, many more adapters are available for download via the Biomni Community, accessible online at <http://community.biomni.com/home>

The Adapter area enables communication details of specific web services, which import / export data from the system and communicate with other systems, including Biomni's Supplier Gateway and Connecta products (deprecated), using pre-built adapters:

- App Store Product hook
- Approval hook
- Catalog Import
- External List-box
- Field Value changed by User hook
- Post Approval Request Export
- Receipt Export
- Reporting Services
- Request Asset
- Request Event hook
- Request Fulfillment hook
- Request Import
- Request Update hook
- Request Validation hook
- Scheduled Task hook
- Tree View
- Front Office (Directa) API



The following hooks are deprecated:

- On 'Requested For' change hook (use Field Value changed by User hook)
- Request Submit hook (use Request Update hook)
- Connecta (deprecated)
- Supplier Gateway (deprecated)

For any of the above the following data must be entered:

- Adapter Display Name
- Web Service URI (excluding Request Import & Front Office (Directa) API)

Only active records will be processed.

A number of security configurations are supported: Basic Authentication (User Name and Password), Windows Authentication (optional User Name and Password) and WS-Security (both Front Office and Adapter certificates).

The Front Office SDK can be found in `<install location>\SDK`. Please contact the support team via the Community at <http://community.biomni.com/home> for further information.

### 8.3.1 Catalog Import

One or more supplier catalogs may be scheduled for import via a scheduled task, using a web service linked to an adapter.

### 8.3.2 App Store Product Hook

A product linked to a Service Catalog 'App Store' category can determine whether the item is available for immediate download for the requesting user, whether a request form (default associated to the App Store or an alternative request type) is generated for user completion, a request is automatically created / completed using known information or the App presented for information only.

### 8.3.3 Request Import

A request can be imported into Front Office, 'pushed' by an external system.

It is also possible to generate a sample Xml import file from any existing request (system reference) using both the 5.40 and 8.0 schema. A version 8.0 schema is available as a Directa API call, and the schema can be found in the Directa API screen.

Business Form requests and loose item requests can be imported; requests containing bundles or off-catalog items are not supported. The xml file also supports automatic submission of the imported request to the approval process. If a stage results in a list-box, the first user in the list is automatically

selected. A punch-in link is also generated, with the option of setting a read-only (Request Summary) or edit (Request Details) property.

Only one request import adapter may be active at any time.

### 8.3.4 Request Export

An approved request can be exported from Front Office to an external system. This functionality is controlled by a system configuration setting and the export details are configured via the Request Export system type in Adapter Maintenance. All request types will be included.

Only one request export adapter may be active at any time.

### 8.3.5 Request Update Hook

A request can be updated by an external system at any point during the request creation process. This functionality is configured via the Request Update Hook system type in Adapter Maintenance and then linked to a specific request type via the Request Type Maintenance main details screen. The hooks can be called and activated on initial request load or as you switch between each level of the request form, i.e., a request update hook can be called when the form is loaded, the requester leaves the header, supplier, or item pages, or enters the approval stage. Additionally, a user-initiated update is possible via an *Update* button within the page. The Request Update Hook can access an adapter and pull back information which then populates predefined request fields on the request, e.g., you may need a Software License check to occur when Software is being requested; the Software licensing system can be called and return data relating to licenses available etc. into the Front Office request.

### 8.3.6 Request Validation Hook

A request can be validated on request submission and updated applied to the request, or validation messages displayed against a specific request field or at overall request level.

### 8.3.7 Field Value Changed by User Hook

A change of request field value in a request form can call a request type level hook to update or reset other related fields. This allows cross field validation to be actioned.

This feature is not available for legacy forms.

Note: *On change of 'Requested For' user* hook is now deprecated and replaced by this hook, which gives more control.

### 8.3.8 Approval Hook

Request information can be passed to an external system for approval and optional update (either request fields editing, or catalog / off catalog items added) at any point during the approval process. This functionality is configured via the Approval Hook system type in Adapter Maintenance and linked to specific rules via the Approval Matrix set up.

#### Related Topics:

[Approval](#)

#### System Configuration Settings:

Public Web Services URL

### 8.3.9 External List Box

A Request Field Type *External List-box* allows data from an external source to be presented to the requester, generated in real time. The request is passed out with the call and the resulting data is presented to the requester either as a single select list box or as a popup supporting multi-select, searching, filtering, and paging. The data presented can have multiple columns, be both text and images and all data can support localization, using the requester's preference.

This functionality is configured via the External List-box system type in Adapter Maintenance and linked to External List-box type fields during request type set up.

An External List-box field can be set via a Request Update Hook or an Approval Hook, although no validation of this field type will occur.

It is possible to include an External List-box field as a Request List column. External fields can be included in Request List Advanced Search, where values will be searched in free text entry mode. Additionally, they can be used for Request Field Approval within Approval Matrix Maintenance, with the operators *Equals* or *Contains*.

**Note: An External List-box field cannot be used as a dependent field. No default can be set. External list-box field presentation ignores the system configuration setting 'Maximum number of items in a picklist display'.**

### 8.3.10 Tree View

A request field type *Tree View* allows data from an external source to be presented to the requester, generated in real time. It is a type of *External List-box* (see above), but the results are presented in a tree view rather than in a tabular form. The request is passed out with the call and the resulting data is presented to the requester as a single or multi-select option; the option to cascade the selection down the tree is also available. Any number of nodes, to any depth, can be displayed.

This functionality is configured via the Tree View system type in Adapter Maintenance and linked to Tree View type fields during request type set up.

A Tree View field can be set via a Request Update Hook or an Approval Hook, although no validation of this field type will occur.

Tree View fields are restricted to the request form and email templates and cannot be referenced elsewhere, e.g., in approval or in Request List Advanced Search.

**Note: A Tree View field cannot be used as a dependent field and no field default can be set.**

### 8.3.11 Request Asset

A request field type *Asset* allows access to an externally hosted asset database where appropriate information may be retrieved and applied to the request. Details are configured via the Request Asset system type in Adapter Maintenance. Multiple Request Asset adapters may be active at any time, allowing each asset field to call a different adapter.

### 8.3.12 Receipt Export

Receipting and Returns information can be exported from Front Office to an external system at a predefined time, e.g., once per day. This functionality is controlled by a system configuration setting and the export details are configured via the Receipt Export system type in Adapter Maintenance. Only one receipt export adapter may be active at any time.

### 8.3.13 Request Event Hook

There are five events available: the *on load*, *on form navigation*, *on approval start*, *on approval stage start* and *on approval completion*.

The 'on load' request hook will fire when the request is loaded from the following actions:

Raising a request from the cart, a bundle, or any type of catalog (including full catalog, favorites, off catalog, app store or quick links); clicking 'return to request' link; editing a draft request; editing a request via a punch-in link; editing a request as an approver or inbox task assignee.

The 'on load' request hook will not fire in the follow circumstances:

When switching between item, supplier, confirm and header request pages; when selecting asset, tree view, or external list box request field popups; when editing a price or quantity on the request item page; when any request rules fire; when approving or completing a task from the request summary.

The 'on form navigation' hook will fire when editing a request and switching between the header, supplier, items and confirm forms.

The 'on approval start' hook will fire when a request has been submitted for approval.

The 'on approval stage start' hook will fire when a new approval stage is activated.

The 'on approval complete' hook will fire when the approval process is completed successfully, or approval has been declined.

Note: It is intended that additional request 'events' will be added to this hook over time, allowing all request interaction to be centralized around a single hook. This will allow the other hooks to be deprecated.

#### 8.3.14 Request Fulfillment Hook

Post the approval stage, the request may be configured to be sent to an external system for fulfillment or an adapter activity could send it as part of an internal fulfillment process.

Multiple Request Fulfillment types may be active concurrently, allowing different routing for individual Request Types. Association to a specific Request Types is via *Request & Approval > Request Type Maintenance*.

A Request Fulfillment adapter may be assigned to a single request type.

#### 8.3.15 Front Office (Directa) API

This adapter definition is available to allow access to the Front Office (Directa) API Web Services to be completely disabled, or for basic authentication or WS-Security to be configured. By default, the Front Office (Directa) API is enabled, if Front Office is running in an environment where the Public Web Services are available over the internet, disabling or securing this adapter should be considered.

Access to the WSDL and available DAPI methods can be found here, as well as the v8.0 Request Import schemas. Information for developers is available in the SDK documentation.

Only one Front Office (Directa) API external system record may be active.

### 8.3.16 Connecta™ Integration (deprecated)

Requests can be sent to Connecta, and status updates received via configuration of the Connecta adapter in Adapter Maintenance. Only one Connecta adapter may be active at any time. The *Enable Connecta Integration* system configuration setting must be enabled, and individual Request Types can be linked to the Connecta adapter via Request Type Maintenance.

A Request Fulfillment (recommended) or a Connecta adapter may be active but not both.

For Connecta version 2.10 or above, summary information about requests that are in approval within Front Office can also be sent and displayed in the Connecta dashboard; configuration for this is within the System Task option under the Settings category.

**Related Tasks:**

[Scheduled Task](#)

**System Configuration Settings:**

Enable Connecta Integration

Request Type: Request Field Code override

Deployment Address: Request Field Code

### 8.3.17 Supplier Gateway Integration (deprecated)

Requests can be sent to Supplier Gateway and status updates received via configuration of the Supplier Gateway system type in Adapter Maintenance. Only one Supplier Gateway definition may be active at any time.

**Note:** *'Enable Connecta Integration' system configuration setting must be disabled if Supplier Gateway Integration is being used.*

## 8.4 Task

### 8.4.1 Scheduled Task

Within the Task option a variety of scheduled system tasks can be activated, and the frequency rules set. Custom tasks may also be created. Tasks can also be forced to run immediately as an ad hoc action. Note that where an actual run time is specified, this may appear inconsistent with the reported Due date / time and the Last Run date / time Available tasks are:

Anonymize User Data	Delete old Audit Trail records (system setting)
App Store Usage Rollup Task	Delete old Email log records (3 days old)
Auto Decline Approval (6 months old)	Delete old Error log records (6 months old)

Calculate Bundle Validity	Delete old Task Queue history records
Check for Request Status Updates	Export Approval counts to Connecta
Check for Requests to be sent	Import Active Directory
Delete expired Request Locks	Import Catalog
Delete Expired Sessions	Import Base Data
Delete old Adapter log records (30 days old)	Send email

### 8.4.2 Custom Tasks

A custom Recurring Tasks can be created and scheduled as per standard tasks, executed by either calling an adapter or running a PowerShell script.

**Related Topics:**

[Data Import](#)

**System Configuration Settings:**

- Audit Trail retention period (days)
- Default System Time Zone
- Email Address of Support Team
- Enable full Auditing for Base Data Import

### 8.4.3 Custom Task Plugins

This screen provides support for creating custom task plugins that allow developers to integrate more closely with the Front Office task engine. Custom plugins can be viewed, both at summary and detail level, on the *Configuration Check* page.

## 8.5 Template

### 8.5.1 XSLT Library

The XSLT Library provides XSLT templates to be used to create snippets of HTML for Rich Text email templates. A sample of the XML passed to the XSLT is available, as is the ability to run the XSLT snippet against any request in the system to demonstrate the output.

### 8.5.2 Email Template

The sending of both Rich Text and XSLT individual email templates can be controlled by deactivation, if required.

#### 8.5.2.1 Rich Text Email Templates

Default templates are provided for the following emails:

- Inbox Task Notification
- Email Activity
- SLA Failure
- SLA Notification

These email templates are managed using a Rich Text editor with replacement parameter support. When the email is sent the template is parsed and the parameters replaced with the appropriate content. To add Replacement parameters, the “Insert template” option on the rich text editor gives access to a popup which can add two types of parameters:

#### Properties

Properties provide access to simple elements of the Request or other properties relevant to the specific template. Simply choose the required property and click Insert.

#### XSLT Templates

XSLT templates provide a way to add complex data to the template. The picker lists all the XSLT templates available in the XSLT Library. These XSLTs are then executed, and the resulting HTML is inserted into the template when it runs.

#### **8.5.2.2 XSLT Email Templates**

The system generates several types of emails during the request and approval process to advise users of request statuses and advise approvers that action is required on a request as part of the approval workflow. The email can be configured using XSLT (Extensible Stylesheet Language Transformation) so that the text on the emails is relevant to the customer’s requests and processes. This is applied on a system wide basis, so all changes apply to all emails of that type that are generated.

#### **The following system emails use XSLT:**

- Request: Approval Required
- Request Approved (Requested By or Requested For user)
- Request: Approval no longer required
- Request: Approval on hold
- Request: Approval Escalation
- Request: Overdue Approval
- Request Notification
- Request Cancellation
- Request Declined
- Request created for you
- Request Summary
- New Supplier Request
- New Password details



Many email types include a summary of the request in the body of the email; the format of this summary can be configured by editing the Common Request Information email type.

Select the Email Type you would like to edit. You can edit the email subject line and include one or more replacement parameters; you can restore the system default email, or you can associate one of your own XSLT files or download the existing template to edit and upload to make changes. To view the email layout, you can preview in the browser or email an example to a specified email address.

To create a replacement parameter in the subject line, the format is:  
`{{XPath expression}}`

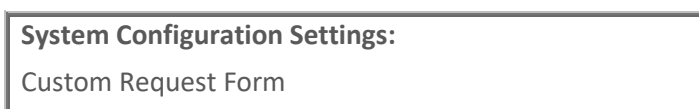
E.g., to display the Requested For user's name:  
`{{../Request/Header/RequestedForUser/User/Name}}`

To include a locally maintained request header field in the subject line or the body, with a Field Code of 'YourRef':  
`##RunXPath:./EmailParameters/Request/Header/RequestHeaderFields/FormField[FieldCode='YourRef']/FieldValue##`

If required, an email can be suppressed by deactivating the template.

### 8.5.3 Custom Form

Custom Form functionality is provided to enable request data to be presented in a printable format, perhaps in the style of a business document. The request data has a specific XSLT applied, which enables the layout and data contained on the output to be controlled. The sample XML output and default XSLT can be generated within the Custom Form configuration screen. Your own XSLT can also be linked to the custom form within this screen.



### 8.6 Theme & Customization

The shipped 'Front Office' theme can be adjusted in this page, both by editing the colors used, as well as some of the images and styles. A 'revert to default' option allows any customized color change to be reset to the base Front Office theme.

The chosen theme selections can be saved / utilized across different sites by using the simple, block copy / paste, plain text import / export facility. Please note that this facility only imports / exports references to images: the actual image must be present on the new site, in your *Images* folder.

Editable aspects:

- Site Wide
  - Page width
  - Page outer color (when page width constrained)
  - Page outer background image
  - Make pages transparent when supported
  - Color for text on page background (should be black unless using transparency)
- Header:
  - Header height (in px; 0 hides header)
  - Header logo (max size 300x75px; left aligned; no repeat)
  - Header background image (repeated horizontally; max height 75px)
  - Header background color
  - Header text color
  - Top Bar IFrame height (in px)
- Colors:
  - Primary color (used in menu bar and other color blocks)
  - Primary text color (text color used on top of the primary color)
  - Secondary color (used in graphical controls, such as service catalog carousel and progress controls)
  - Secondary text color (text color used on top of the secondary color)
  - Highlight color (to emphasize text / elements – must be visible on white)
  - Subdued color (used in graphical controls, such as progress controls, to grey out areas)
  - Subdued text color (used on top of subdued color)
  - Success color (to show success, normally a shade of green)
  - Attention color (to warn / emphasize something in progress, normally a shade of orange)
  - Failure color (to show failure, normally a shade of red)
- Menu:
  - Menu bar background image (repeated; max height 27px)
  - Cart image (left aligned; no repeat; max size 350x75px)
- Page:
  - Title background color
  - Title area background image
  - Title area text color
- Buttons:
  - Button background color
  - Button text color
  - Button border radius
- Service Catalog / Bundle elements:
  - Themed panel background color (themed panel used in service catalog, bundle, and login page)
  - Themed panel text color
  - Themed panel heading color
  - Themed panel border color
  - Themed panel margin, size in px (recommended between 0 - 6)
  - Themed panel border radius
  - Themed panel bullet image (max size 16x16px)
  - Carousel Background Image

- Notices:
  - Information message background color
  - Information message text color
  - Alert message background color
  - Alert message text color

All changes made here are retained post version upgrade.

Further explanations and tips can be found in the *Front Office Theming Guide*.

### 8.6.1 Themes & Stylesheets: Advanced Use

If the Theme page does not support the desired presentation, additional changes can be made via the Custom CSS tab. This will override the styles defined in the Biomni.css.

Certain features, e.g., the 'Forgotten Password' link on the login page, belong to a separate class and can therefore be hidden if required.

Any customizations made as Custom.CSS should be reviewed on upgrade to a new version, as new features may require further adjustment.

### 8.6.2 Custom JavaScript

This allows the creation of custom JavaScript. Field values for all request field types are accessible via the JavaScript API. All Front Office pages are uniquely identifiable, which aids integration.

### 8.6.3 Menu

This tab allows the menu area contents to be specified, including the top bar replacement menu (Iframe) URL, and display of the Request List and Inbox.

### 8.6.4 Custom About Me

This section allows custom tabs to be added to the About Me page.

## 8.7 Currency & Language

Within this subcategory, all the currencies and exchange rates required in a multi-currency system and any additional languages needed across the user base, can be configured. This allows users with different language or currency bases to use the same system.

### 8.7.1 Currency & Exchange Rate

A full list of ISO 4217 currencies is available via *Settings > Currency & Language > Currency*. Any number of currencies can be activated for use within Front Office. An active currency must have a current exchange rate. Selected display attributes of the currency can be amended. Activating a currency allows alternative user set-up and also allows users to select an alternative display currency via My Account, if enabled.


Exchange rates are required purely for internal display calculations, where the user’s chosen currency differs from the system base currency or the supplier’s catalog currency. All catalog and request information is stored in the database in the supplier’s currency.

### 8.7.2 Language

The system is available in 18 languages:

English (UK)	French	Norwegian (Bokmal)
English (US)	German	Portuguese (Brazil)
Chinese (Simplified)	Hungarian	Portuguese (Portugal)
Chinese (Traditional)	Italian	Russian
Danish	Japanese	Spanish
Dutch	Korean	Swedish
Finnish	Malay	

The system can run in single or multiple language mode. If multiple languages are enabled (via *Settings > Currency & Language > Language*) a language selection option in About Me can be enabled, via a system setting, to allow a user to switch between languages.

The core framework of the system is available in each of those languages and most customer-maintained data can also be translated. In the administration areas, the fields that can be translated display  icon adjacent. The default field value must always be entered in the default system language; if no customer maintained alternative language value is present, the field will display the Default System Language. Catalog and user entered data is only available in a single language.

Note: system base language is set during install and should only be changed whilst the system is still empty, especially for a multi-language site. Later change of default language risks unpredictable results and should not be attempted. If in doubt, please contact the support team via the Community at <http://community.biomni.com/home> for further information.

**Related Topics:**

[Configuration Check](#) (for base currency & language)

**System Configuration Settings:**

Enable Multi Currency in catalogues / requests  
 Default System Language  
 Enable Users to select preferred Language

### 8.8 Integration Settings

Front Office adapters can be written to register their configuration settings on install. These can be managed from within this page. Normally adapters will be demarcated by section and settings will be either text or password; passwords will be encrypted in the database.

User level settings, as well as acceptable values, can also be specified and designated as editable 'for' or 'by' the user. User level values can be set within the *User* maintenance screen or via *My Account*, as appropriate and values are importable via a Base Data import / export facility, off the *Admin > Organization > User* menu.

### 8.9 Receipting, Returns & Asset Registration

Front Office supports registration of receipts against individual request items, recording of associated asset information and recording of 'returns' against previously received items. This functionality is controlled via system settings and access profile rights for users.

The following Access Rights control who can carry out which receipting functions within the system once the Receipting functionality is activated:

- Receipt all requests (the Requester and Requested For against a request will automatically have rights to receipt against their own requests)
- Receipting Administrator (allows Receipts to be changed and outstanding items closed)

Once enabled, Receipting, Asset assignment and Returns are manually registered against individual requests by accessing the Receipt tab on the Request Summary screen or auto receipting rules can be configured via Admin area *Settings > Auto-Receipting*.

By default, multiple quantities will be rolled up to display a single supplier / item line. If receipting is required at the same level as the items on the request, a line number will be displayed on the receipting pages, to match the line number displayed on the Request Summary.

Receipting, Asset and Returns information can be exported from Front Office to an external system. This functionality is controlled by a system configuration setting and the export details are configured via the Adapter section.

**Related Topics:**

Adapter

### 8.9.1 Auto-Receipting

Auto-Receipting can be configured to apply to suppliers, commodity types, or values, and any combination of these three options; as many rules as required may be created. A receipt will be created post request approval complete if any rule matches.

### 8.9.2 Enabling Asset Registration on Receipting

It is possible to register asset-related details when receipting an item. The relevant system configuration setting must be activated to enable this functionality.

When a receipt is created the user can enter an *Asset Number*, a *Serial Number*, or an *Additional Reference*. Once entered, assets may be cleared / edited until final committal using the 'ok' button, after which point no further changes may be made.

Any added Asset information is included in the Receipt Export (if used) and can be viewed within a collapsible panel in the *Receipted* tab against a request.

### 8.9.3 Returns

It is possible to create a return note against a Receipt, via the Receipt menu against individual requests. This is for internal record accuracy only and no system generated communication will be made with the supplier.

**System Configuration Settings:**

- Enable Receipting
- Allow Auto-Receipting
- Default Receipt Date
- Enable Receipt Asset Functionality
- Enable Receipt Export
- Enable Returns Functionality
- Expand Receipt Items

## 8.10 System Code

Most data elements must have a unique code assigned on creation. Those listed below will be defaulted with an automatically generated unique ID. The Request Type and Request Field generated IDs can be edited by the user, whilst the creation of a role can be configured to support a free text entered code or an automatically generated code, with manual override.

- Request Type
- Request Field
- Role
- Goods Received Note
- Returns Note

### 8.11 Business Time

Business Time allows individual days to be set as operating days with the additional option of specifying a start and end time within the day. Alternatively, a day can be set to '24 hours' where there is no interruption to business activity. The starting default is Monday through Friday, 24 hours per day.

This configuration is considered when calculating Approval reminders / escalation, Approval days' waiting, Internal Workflow Inbox Task duration and Internal Workflow SLA timings.

**Related Topics:**

[Approval Reminder / Escalation](#)

[Internal Workflow – Inbox Task](#)

[Internal Workflow - SLA](#)

## 9.0 Support

The Support category logs data relating to information passing in and out of the system, as well as creating a full audit of all actions taken within configuration and request processing.

### 9.1 Biomni Support

This is a hyperlink to the Biomni Community site, where extensive self-help resources can be found, including knowledge base articles, FAQs, videos, adapters, and templates to download. Support tickets can also be logged here. It is accessible online at <http://community.biomni.com/home>

### 9.2 Error Log

A full list of errors encountered either by back or front-end processing. Users typically receive a 'friendly' error message, referencing an Error ID. The full details of the error are listed here and can sent, if using IE browser, via the email facility, to the support email address listed on the Community at <http://community.biomni.com/home>.

### 9.3 Configuration Check

This area contains a myriad of settings and information essential to Front Office's successful operation.

Note: if editing any system setting from this page, clicking *Close* on the *System Settings* list will return to the launching page.

#### Server tab

The *Server* tab contains core installation information about the Front Office instance and should be used for both proactive and reactive viewing.

All Front Office Services will be displayed; services no longer used may be cleared from view. The next refresh will create an updated list. Two monitoring measures check the current health of the service, primarily whether the Internal Workflow, Task Engine and Scheduler jobs are running ('Heartbeat') and responding ('Watchdog').

The web server name and address (editable) are listed. The Public Web Service check allows the configuration of the website and the public web service (editable) to be compared. If the system is correctly configured, they should match.

Custom plugins can be viewed at both summary and detail level. An edit facility takes the user to the Custom task Plugin maintenance page.



### Base Settings tab

Display of core configuration data required by Front Office: default currency, language, time zone and country settings, as well as the site identifier (primarily used for integration). All settings, excluding *Currency*, can be edited here. The system currency cannot be amended post install as financially based request values are stored using this value. Changing the system language post install needs careful evaluation.

*Request Summary PunchIn* link allows a specific request to be accessed directly from an external source, e.g., a web page or email. The link must be copied, and the final number replaced by the System Reference. On accessing the link, a user will be authenticated by Front Office, either automatically, if integrated security mode is enabled, or via the log-on page. Once authenticated, they will be routed to the specified Request Summary, assuming the recipient has the normal access to the request.

This link cannot be used for Single Sign-On configurations out of the box. Please contact the support team via the Community at <http://community.biomni.com/home> for further information.

The *Image Upload Test* allows images which will be available through any of the (full) rich text editors to be accessed to ensure the folder is in the appropriate location.

**System Configuration Settings:**

Public Web Services URL

### Email tab

Reporting of all email configuration and settings. The Admin and Support Team's email addresses can be edited here, as well as the sending email address for approval and fulfilment system generated emails. SMTP settings and email formatting via XSLT can be amended via links; a test mail can be sent, and the Email Queue monitored.

### Reporting tab

Reporting of the main configuration settings to assist reporting set up; the Adapter definition can be edited via *Settings > Adapter*, whilst the *Reporting Services Folder* can be edited here. Individual reports are listed with their data sources configuration, to allow confirmation of correct data.

Please refer to the Install document in the Front Office 9.1 Reporting zip for customization guidance and details of the shipped reports. This module is available dependent on license.

### Search

The search facility within a Service Catalog App Store utilizes a pre-built index, which runs in full once per day, on each web server. A partial index is triggered if any product in the system is updated. A full re-index can be requested at any time.

Pre-built Indexes allow an end user's search results to be returned very quickly.

## Caching

Front Office employs data caching mechanisms to avoid unnecessary load on the database server by reducing how often data that changes infrequently is retrieved. The most efficient of these is "SQL Cache Dependency". This mechanism only retrieves data from the database when it has changed.

If operating properly, the *Cache Type* should display as "SQL Cache Dependency". Otherwise, a message will display explaining a problem has occurred; this is an unlikely scenario, but the Error Log should be checked as a starting point for diagnosis. Front Office will continue to work but changes to Front Office configuration may not take place immediately.

The Cached Data section shows when data was added to the cache and can give an indication as to whether caching is working correctly.

## 9.4 Task Queue

Lists of task activity. Tasks cover a large range of asynchronous tasks required by the system, including Bundle validation, Approval emails and Approval Hooks. Information is split across four tabs: *Current* (tasks queued in the Task Engine), *Scheduled* (recurring tasks), *Future* (one-off tasks that will be run, e.g., approval escalation, SLA expiry or fulfillment tasks that are configured to delay) and *History* (tasks that have run over the last eight days).

The *Current*, *Scheduled* and *History* lists show currently active tasks as green and failed tasks as red.

If large numbers of tasks are outstanding on the *Current* tab, check the status of the Windows Service via the [Configuration Check](#) screen.

## 9.5 Email

### 9.5.1 Email Queue

Any system generated emails that are either at Pending status or that have failed to send, are displayed within the Email Queue list. From here, emails can be resent or deleted.

When displaying any queued records, a check is made to ensure the email system task is enabled and if not, a warning message is shown.

### 9.5.2 Email Log

This screen provides visibility of all system generated emails that have been sent, selectable by date. The content of the email is also included.

**Related Topics:**  
[Scheduled Task](#)

## 9.6 Integration Logs

The individual log detail pages also contain correlated records, to aid full diagnosis. Production of these logs is controlled by the system setting *Enable Integration Logging*, which can also be updated from the Integration Logs page. If integration traffic is heavy in the site, it is advisable to disable logging until required to for support purposes. This will protect against logs becoming full.

### 9.6.1 Catalog Import

The full outbound and response XML is available for all Catalog Import web service transactions. These logs are deleted after 30 days.

### 9.6.2 External User Import (Active Directory)

The full outbound and response XML is available for all External User Import transactions. These logs are deleted after 30 days.

### 9.6.3 Adapter Log

The full outbound and response XML is available for all Adapter web service transactions. These logs are deleted after 30 days.

### 9.6.4 PunchOut Log

The full outbound and response cXML is available for all Supplier PunchOut transactions. These logs are deleted after 30 days.

**System Configuration Settings:**  
[Enable Integration Logging](#)

## 9.7 Audit Log

A log of audited actions within the system, retained according to the number of days specified in the system setting.

Note: audit records are retained for the period specified within the system configuration setting apart from request specific audit records, which are retained indefinitely.

**System Configuration Settings:**  
[Audit Trail retention period \(days\)](#)

## 9.8 Login Log

A list of the login entries by UserID / date. The list can be filtered by date and the UserID searched on.

## 9.9 Workflow

### 9.9.1 Internal Workflow Log

This screen provides visibility of all active and complete Internal Workflow processes. It is possible to manage active workflows from this screen with similar functionality to the Request Fulfillment tab.

### 9.9.2 Internal Workflow Action Queue

This screen provides visibility on pending and failed actions for Internal Workflow processes. It is of use when trying to diagnose problems with the workflow process.

## 9.10 SLA Log

This screen provides visibility of all SLAs that have been attached to requests. It shows the status, as well as key dates and times for the SLA and any notifications.

## 9.11 Documents

A list of documents: Complete Administration Guide, Multi-Tenant Solution Guide, Service Catalog Overview, Form Design Best Practice, Request Fulfillment Overview, System Settings List, Federated Single Sign-On, Theming Guide and the current version Release Notes and Install & Upgrade Guide

All documents are available in English only.

## 10.0 Additional Information

### 10.1 Data Import

Importing and exporting of data is available throughout the relevant administration areas to provide a simple regular update facility for potentially large amounts of data. The following data types can be imported:

#### XML Import / Export

These are typically system to system transfers, initiated by the user for immediate processing. For imported files, any errors or warnings are presented on screen to the user. Confirmation actions may be required.

- Service
- Service Catalog
- Request Type
- Bundle

It should be noted that the Approval Matrix and associated Bundles (for Item Requests) are not included in Request Type Import / Export. The Approval Matrix must be imported separately and assumes that the appropriate roles have been created in the Request Type. All relevant Adapter definitions must already exist and will be matched by name; this is particularly important as request types are imported with no validation checks.

A request type or bundle is imported as 'deactivated'; an individual service as draft. A service within a full-service catalog import retains its original status.

#### CSV or TXT Import / Export

This is typically a system-to-system transfer. Import can either be initiated by the user, for a selected supplier, for immediate processing or configured for import via a standard scheduled import task, allowing a specified time / frequency to be specified; this can be set up for one or more suppliers.

For user-initiated imports, any errors or warnings are presented on screen to the user. Confirmation actions may be required. For scheduled import errors, details can be found in the *Support > Other Logs* area.

- Catalog

Processing of this file is by column name, which allows greater flexibility for backward compatibility when new optional columns are added. Supplier, Part Number and Part Name are the only mandatory fields and must be present in every import; all other fields are optional, and columns can be removed if

external update of current (possibly locally maintained) data is not required. Data is processed by column name so these must be accurate.

The file includes all the commonly used catalog fields but is not a full representation of fields available in the Supplier Gateway or the Front Office Catalog Maintenance screen.

Files can be exported to CSV or Unicode text (tab delimited) format. A system setting '*CSV Import and Export encoding*' controls which character encoding the CSV uses; the setting is defaulted to Windows 1252. Unicode text will always be in UTF8.

If the file will be edited in Microsoft® Excel™, it should be noted that Microsoft® Excel™ does not handle Unicode CSV files. If your install has data which will not fit within a single non-Unicode encoding, the Unicode Text format must be used.

Tip 1: Excel™ strips leading zeroes so if they should be preserved, e.g., for a part number, prefix the numbers with '0'

Tip 2: when updating existing information, always consider exporting the currently held information prior to the new import. This can be a useful starting point before edits or also a useful backup if the newly imported data is incorrect.

#### **CSV or TXT Import / Export - Base Data for Task Queue or File Drop**

- Division & Cost Center
- Address
- User
- User Group & User Group Members
- Request Field – List Box options (legacy forms only)
- User Field Defaults (legacy forms only)
- Position Code
- Approval Matrix
- Cost Center Approver
- User Integration Settings

A standard template for Base Data Imports is available, via a link at each of the individual Import screens, which can be used to import data as it specifies the correct formatting required for each data type, as well as the row-level actions supported, i.e., update or delete, meaning that partial files just including any changed rows can be applied. This template also provides column level instructions / validation rules which must be adhered to.

Processing of these files uses fixed column positioning so the file will only be processed when the expected number of columns are present; the columns must also appear in the same sequence as the template. When functionality changes in a release version, the updated template must be used.

Files can be exported to CSV or Unicode text (tab delimited) format. A system setting '*CSV Import and Export encoding*' controls which character encoding the CSV uses; the setting is defaulted to Windows 1252 (Western European). Unicode text will always be in UTF8.

If the file will be edited in Microsoft® Excel™, it should be noted that Microsoft® Excel™ does not handle Unicode CSV files. If your install has data which will not fit within a single non-Unicode encoding, the Unicode Text format must be used. Please contact the support team via the Community at <http://community.biomni.com/home> for assistance.

Where an import / export is available, it is shown against the specific category options within the Administration area. The Import facility is controlled by an access right. When multiple file types are to be imported, care should be given to the sequence of the queued tasks, to prevent new / amended data being processed out of sequence. Only one instance of a file can be queued at a time.

Tip 1: when updating existing information, always consider exporting the currently held information prior to the new import. This can be a useful starting point before edits and is also a useful backup if the newly imported data is incorrect.

Tip 2: additional rows added to the Approval Matrix should always be added with a blank Row ID. Editing an existing matrix record must always be carried out on the exported file.

Tip 3: if assigning a time zone exception to a user's record, find the Time Zone identifier by looking in *Organization > User Maintenance > Add / Edit User*, selecting the appropriate time zone from the drop-list and using the value in the associated help text question mark.

Tip 4: If importing multiple file types, they should be processed in the following sequence to ensure dependencies across files do not cause errors:

Division, Cost Center, Address, User, User Group, User Group Member, Request Field Picklists, User Field Default, Position Codes, Approval Matrix, Cost Center Approvers & User Integration Settings.

### 10.1.1 Automated File Uploads

Automated pickup of Base Data Import CSV or TXT files from a physical directory can be scheduled. Access the *Scheduled Task* configuration page, under the *More...* link within the Settings Category. A daily schedule for automated file pickup and a directory location must be specified. The time specified will relate to the Default System Time Zone.

The Biomni Front Office Service must have permissions for the folder within which the files are to be dropped. Any errors will be emailed to the Support Team email address and audit records will be written, depending on the system setting of full or summary level auditing. Summary level is always recommended for performance and usability reasons.

Multiple files of the same type are processed in date order and multiple file types will be processed in the following sequence:

Division, Cost Center, Address, User, User Group, User Group Member, Request Field Picklists, User Field Default, Position Codes, Approval Matrix, Cost Center Approvers & User Integration Settings.

File names must be in the appropriate format, where data pre asterisk is fixed, i.e.:

- DivisionImport\*.csv or DivisionImport\*.txt
- CostCentreImport\*.csv or CostCentreImport\*.txt
- AddressImport\*.csv or AddressImport\*.txt
- UserImport\*.csv or UserImport\*.txt
- UserGroupImport\*.csv or UserGroupImport\*.txt
- UserGroupMemberImport\*.csv or UserGroupMemberImport\*.txt
- RequestFieldPickListImport\*.csv or RequestFieldPickListImport\*.txt
- UserFieldDefaultImport\*.csv or UserFieldDefaultImport\*.txt
- PostionCodeImport\*.csv or PostionCodeImport\*.txt
- ApprovalMatrixImport\*.csv or ApprovalMatrixImport\*.txt
- CostCentreApproverImport\*.csv or CostCentreApproverImport\*.txt
- UserIntegrationSettingsImport\*.csv | UserIntegrationSettingsImport\*.txt

Exceptionally, if required, the expected file naming format can be changed, however this requires additional server configuration. Please contact the support team via the Community at <http://community.biomni.com/home> for further information.

### 10.1.2 Scheduled Catalog Import

One or more catalogs may be scheduled for import via a standard scheduled import task, allowing a specified time or a frequency to be specified. A web service is specified in an Adapter definition.

### 10.1.3 Active Directory

Users can be imported from Active Directory via a scheduled task, allowing multiple sources to be listed. An import profile requires a target access profile, cost center and status to be identified, as well as zero or more user groups to which users may be associated; the user group must exist in Front Office. Multiple import profiles can be specified. An import profile can be specified by group or organizational unit, with or without 'children' included.

**Related Topics:**

[Scheduled Task](#)



Adapter

**System Configuration Settings:**

CSV Import and Export encoding

Enable full Auditing for Base Data Import

Email Address of Support Team

## 10.2 Integration

Below is a summary of the different facets of Front Office integration. More detail can be found in the relevant sections in the Admin Guide or by contacting the support team via the Community at <http://community.biomni.com/home> for further information.

Front Office Integration		
<p>Web Site Panels - CSS – JavaScript – PunchIn</p>	<p>Single Sign-On</p>	<p>Adapters</p>

### 10.2.1 Panels

The Service Catalog provides custom user interface integration by allowing custom panels to be developed and displayed within the Service Catalog. These panels can range from simple read-only widgets to full blown applications that might use other Front Office integration points, including the Front Office SDK and web service API, custom CSS, custom JavaScript, panel JavaScript and Punch-In URLs.

### 10.2.2 Cascading Style Sheets

The Front office website cascading style sheets can be customized by editing via *Admin > Settings > Theme >> Custom CSS* tab.

### 10.2.3 JavaScript

Site based JavaScript customizations can be applied via *Admin > More... Custom JavaScript*

When developing custom panels there are typically requirements for the panel to communicate to Front Office, for example redirection when session timeouts. This page ensures `Biomni.FrontOffice.js` file can be referenced in a custom panel, providing client-side functionality to Front Office.

### 10.2.4 Punch in URLs

PunchIn URLs are URLs that provide external access to different parts of the web interface. These can also be utilized by custom Service Catalog panels, allowing navigation between panels.

### 10.2.5 Adapters

There are several integration points provided by adapter web service hooks that allow integration with request and workflow.

### 10.2.6 Custom Single Sign-On

If the out of the box authentication mechanisms provided by Front Office do not satisfy business requirements, a custom Single Sign-On component can be developed. To implement custom Single Sign-On, a new dynamic link library must be created that implements the single sign-on interface contract.

## 10.3 Time Zones

A system default time zone is specified at point of implementation, but Front Office also has functionality which allows users to view data related date / time information in their own time zone, if different. If the system setting is enabled, the user can set their time zone via About Me.

The system provides a standard set of International Time Zones based around GMT + / – hours. A full list is also available in the document template for Data Imports.

**All data is saved in UTC (Coordinated Universal Time) as an unambiguous point, unaffected by seasonal variations. It is essential that the user's Time Zone is accurate as it is used as a basis for the conversion to UTC.**

**System Configuration Settings:**

Default System Time Zone

Enable User selection of Time Zones

## 10.4 Help Link

Help Text is now written by the customer, so that help text appropriate to the organization's configuration can be provided to the end user.

To customize the Help Text, select the Administration tab, then System Settings, System Settings, Display, Help Text link.

### 10.4.1 Single Language Setup

If your system requires only single language help text:

1. Save the HTML file containing the help text under the Virtual Root of the system.
2. Modify the Front Office system setting *Help Text Link* so that the value contains the path to the help text file.

### 10.4.2 Multi-Language Setup

Front Office supports the following cultures:

en-GB	hu-HU	pt-BR
en-US	it-IT	pt-PT
da-DK	ja-JP	ru-RU
de-DE	ko	sv-SE
es-ES	ms_MY	zh-Hans
fi-FI	nl-NL	Zh-Hant
fr-FR	nb-NO	

**Note 1: If your system requires help text for multiple languages the following conventions must be followed:**

Under the Virtual Root of the system create a help text folder and a sub folder for each culture Front Office supports.

**Note 2: the sub folder must be named as an exact match to the culture it supports, e.g., if there is an Italian help text file, this must reside in a folder called 'it-IT'.**

Modify the Front Office system setting *Help Text Link* so that the value contains the path to the help text file. Substitute the culture code with: <User-Culture>

**Example:**

If the Front Office system supports English (UK), Italian and German, the following folder structure should be used:

HelpText:

- en-GB
- it-IT
- de-DE

Help Text Link system setting:

***HelpText/<User-Culture>/helptext.html***

**System Configuration Settings:**

Help Text Link

## 10.5 Image Management

Images will always be resized prior to display, where needed. However, downloading from an external site and resizing one or more images can have an impact of page load times, so, where possible, the size of the image should closely match the recommended size stated on the relevant page.

## 10.6 Additional System Configuration Settings

Up to three customer-configured hyperlinks may be displayed at the base of the home page, e.g., to link to specific terms of use or privacy statements. It is possible to set a label for each link, as well as whether it is displayed only for logged in users.

A global setting determines the maximum number of items for a picklist before a searchable pop window is displayed instead. A global setting, which can be overridden by users in *About Me*, determines the maximum number of records displayed in each page of a grid.

The system configuration settings referenced in this document are considered the key settings; additional settings are available in *Settings > System Configuration*.

### System Configuration Settings:

Custom link to be displayed on Home Page (x3)

Label of Custom link to be displayed on Home Page (x3)

When to show Custom link on Home Page (x3)

Maximum number of items for pick-list display

Maximum number of records to show in list views

## 10.7 Virus Checking Request File Attachments

The API supports custom virus check software to be utilized for request file attachments and the API 'Create Attachment' method. A system setting supports details of the plug-in. If a virus is detected it will be written to the Error Log.

Note: this will only check request file attachments. Image uploads and file uploads in the Admin menu (data Import) will not be included.

### System Configuration Settings:

Custom anti-virus plugin

## 10.8 Cookies

Front Office uses and requires cookies to be enabled on the customer / user's internet browser. These cookies are solely used to hold temporary session information to improve usability of the application whilst ensuring secure access to all application areas.

## 11.0 Standard end-user pages

### 11.1 Request List

The Request List displays all available requests for the current user and can be viewed in two ways: Panel and List.

In Panel view, requests are not grouped by request type but listed individually down the left panel with the current selected request being shown in the right panel. The list of requests auto load on scroll down.

The 'quick search' option is a wildcard search on Request Number, Request Label and System Reference. The list can additionally be filtered by Age (within a day / week / month), Request Type or Status (a dynamically created list of the milestones by sub status that the user has access to). More powerful users can choose to display either their own requests or all requests. The latest search criteria are retained across sessions and used when displaying the Request List on the next visit.

In List view, the columns displayed within each expandable Request Type group can be configured via the [Request Type](#) maintenance screens. A System Configuration Setting, '*Maximum number of records to show in list view*', defaults the length of the grid. This can be overridden at User level via About Me.

A user will always see their own requests, either those they have raised or those that have been raised for them. Additionally, if the user has the *View All Requests* access right enabled, they will be able to see requests for all cost centers within their own division<sup>1</sup>. Cross division viewing can be enabled by associating a user with additional divisions via their user record in [User Maintenance](#). A user with *Supervisor* profile, or a user with *Supervisor Privileges* access right assigned, sees all requests.

If using [Internal Fulfillment](#), the running / completed process can be visible in a page on the Request Summary, depending on access rights. An additional access right controls what actions are available. Notification of task or activity failure is emailed to the support desk and a correlated Workflow Log can be viewed in the Support menu. Any user with access to the Request Summary tab can retry a failed task.

The status of individual activities in the workflow are visible via a pending, completed or failed icon. A running or failed activity can be aborted by a user with the appropriate access right.

If using Service Level Agreement functionality, a traffic light status (green if 'ok', amber if at 'warn' status and red if 'failed') is available both in the Request List, as a configurable column, and on the Request Summary information panel. Display of this information is controlled by an access right.

The request definition will be relevant to when the request was created (except for 'legacy' forms where the new definition is shown with any old data appended), which may cause issues for updated external list box / tree view fields.

An existing request can be copied, which will create a new *draft* request. The request type definition must be consistent between original request and now.

Theme properties can be used to emphasize success, warnings, or failure in the Request Summary milestones differently to the shipped colors.

<sup>1</sup> *View All Requests* access right excludes any request designated *sensitive*. Sensitive requests are only viewable by Requested By or Requested For users by default. Additionally, any user named in the approval route can perform a Request List advanced search, and by selecting themselves in the *Approved By* or *Currently Being Approved By* fields, to view the request. No other admin user can view the request.

## 11.2 Inbox

The Inbox is effectively a 'To Do' list. It may contain just Approvals or also Tasks, if Internal Fulfillment is enabled. A user with *Supervisor* profile, or a user with *Supervisor Privileges* access right assigned, sees all requests.

### 11.2.1 Approvals List

The Approvals List is available as a panel view. The list of requests requiring approval is in a left-hand panel with the currently selected request being displayed on the right. The list auto loads more requests when scrolled down.

Requests can be filtered by Status (a dynamically created list of actual requests either 'on hold' or 'pending') and by Request Type. The 'quick search' option is a wildcard search on Request Number, Request Label, System Reference, Requested By (name), Requested For (name), Approver (user name, group name or adapter name) and Role Name. By default, the list will display the oldest approvals first, but this can be swapped to displaying the newest.

A Supervisor or a user with the appropriate access rights can select an alternative approver for any current or future approval stage in a request that has already been submitted for approval. This might be used if an Approver is off sick.

Sensitive requests are only viewable by the specific user named in the approval route for the active approval stage. No other admin user can view the request.

The ability to resend the email to the existing approver is available and if 'out of office' dates have been specified and are relevant today, they will be displayed as mouse-over text. From the Home Page select *Approvals*; find the relevant request; select the *Approval List Edit* in the final column. The appropriate approval stage can then be edited.

A System Task allows requests that have been in approval for more than 180 days to be automatically declined, i.e., calculated using the approval stage start date. An approval-declined email will be sent to the Requester. Any request *On Hold* will be ignored. This feature can be enabled via *Settings > System Task* screen.

### 11.2.2 Tasks

The *Tasks* tab will display if the request Internal Fulfillment feature is enabled. Once an Inbox activity is triggered, an Inbox Task is created and the assignee individual or group emailed. All current tasks are also listed in the Tasks list. The list can be filtered by Request Type and assigned group. The 'quick search' option is a wildcard search on Request Number, Request Label, System Reference, Requested By (name), Requested For (name), Assigned (user or group name) and Action Name.

A user sees any Tasks that have been allocated to them individually or as a member of the assigned group. A group member can process the task immediately or assign it to themselves for later processing. A task can be completed, held, or cancelled (cancellation effectively completes the task so that the workflow process can move on). A user with the appropriate access rights can assign the task to another group or user if re-allocation is required. The task assignee can access the request and field permissions will be determined by the task's role.

Any pre-submission integration hooks configured with the request are not run again if the request is edited by an Inbox assignee.