

# Features by Version

## Front Office

CATALOG	7.3	8.0/1	8.2+	8.4+	8.6+
<b>Service Catalog &amp; Service Portfolio</b> Easily navigated, highly graphical view of services and commodities, displayed optionally as a carousel and with tiled images.	x	NEW	✓	✓	✓
<b>App Store view</b> Category presented as an App Store, with options for immediate download, streaming or placing a request. Popularity, ratings and reviews available.	x	NEW	✓	✓	✓
<b>'Panel' support</b> Presentation of external sourced / hosted content e.g. reporting or external websites; additional capability for user to generate a request using IFrame data as source	x	NEW	✓	✓	✓
<b>Request launch from 'panel'</b> Ability to launch a request from a panel, either as a full page or as a popup	x	x	NEW	✓	✓
<b>App Store-style Service Categories</b> Services displayed as tiles, with image display (with HTML descriptions – 8.4)	NEW	✓	✓	✓	✓
<b>App Store-style Bundles</b> Images and organization using separator text	✓	✓	✓	✓	✓
<b>Home page notices</b> Date / time-controlled alerts and information – for display at the top of the page	x	x	NEW	✓	✓
<b>Tree list catalog view</b> Full catalog browse via tree list, incorporating vendor catalogs, bundles, favorites and forms	✓	✓	✓	✓	✓
<b>PunchOut to a supplier's website</b> Ability to browse a supplier's website and include selected items in request	✓	✓	✓	✓	✓
<b>Raise a request using another user's catalog</b> Ability to raise request for another user using their catalog views, based on other user's group membership	✓	✓	✓	✓	✓
<b>Searching catalog</b> Searching within Service Catalog or full catalog	✓	✓	✓	✓	✓
<b>Approved lists</b> Approved lists configured at item or supplier level	✓	✓	✓	✓	✓
<b>Quick Links panel on Service Catalog view</b> Quick navigation links to approvals/recent requests, and customizable sections	✓	✓	✓	✓	✓
<b>Service Catalog Menu</b> Independently managed service menu display option	x	x	x	x	NEW
<b>Service Catalog Category Display Style: Small Tiles</b> Small tiled display style in for structured display of available services	x	x	x	x	NEW

REQUEST PROCESS	7.3	8.0/1	8.2+	8.4+	8.6+
<b>Request entry - step through pipeline</b> Request create and edit pages streamline data capture, including ability to save requests as draft	✓	✓	✓	✓	✓
<b>Request entry – confirmation form</b> Additional optional form for end of request edit pipeline,	x	x	x	x	NEW
<b>Powerful forms builder</b> Forms’ designer with ability to create versatile, stylized, professional looking forms, tailored to the corporate preference	x	NEW	✓	✓	✓
<b>Rules based field display</b> Fields displayed or hidden dependent on prior selections	x	NEW	✓	✓	✓
<b>Externally sourced request field type</b> 'External list-box' field sources data from another system, in real time, with search, user filters, paging and multi select newly included	✓	✓	✓	✓	✓
<b>Externally sourced tree view field type</b> Data sourced externally, represented as a tree view. Single / multi-select and cascade supported, as well as icon display at node level	x	x	NEW	✓	✓
<b>Request creation data retrieval</b> Configured per request type; support for initial request load from an external source	x	NEW	✓	✓	✓
<b>Request on-load hook</b> Configured per request type; support for external source update whenever the request is loaded post creation.	x	x	x	NEW	✓
<b>Associated field refresh on change of external data</b> Clearing of field data where change of external data invalidates data previously entered in associated fields	x	x	NEW	✓	✓
<b>External data retrieval hook prior to approval</b> Configured per request type; support for synchronous updates from external system, post Details, Item, Supplier pages	✓	✓	✓	✓	✓
<b>Request wide validation hook</b> Configured per request type; support for synchronous validation by external source	x	x	NEW	✓	✓
<b>Bundle driven request types</b> Selection of specific request type driven by the bundle selected	✓	✓	✓	✓	✓
<b>App Store driven request types</b> Selection of specific request type driven by the originating App Store	x	x	NEW	✓	✓
<b>Field level tooltip help</b> Hover-over field help icon displayed as tool tip	✓	✓	✓	✓	✓
<b>Single item simple request process</b> A single item can be fast-tracked through a simple request process	x	x	NEW	✓	✓
<b>Switch field type</b> Alternative to check box and simple list	x	x	x	x	NEW
<b>Approval and Basket form control</b> Place the basket or approval control on any form to show the items or approval routing associated with the current request	x	x	x	x	NEW

APPROVAL	7.3	8.0/1	8.2+	8.4+	8.6+
<b>Choice of extensive options for approval rules at multiple stages</b> Simple or complex approval rules available to create an Inbox driven approval process. Rule options include, levels, value based rules, designated users or groups, originating user and more. Approval process sequential or parallel	✓	✓	✓	✓	✓
<b>Ability to enable approval by request type</b> Allows approval to be enabled for any given request type	✓	✓	✓	✓	✓
<b>Ability to apply conditional approval</b> Inclusion of stages, or whole approval process, conditional on certain rules being met	x	NEW	✓	✓	✓
<b>Approval using request fields</b> Approval routing driven by any request field value (text, number & pick-list) in addition to value, division, cost center, commodity type	✓	✓	✓	✓	✓
<b>Approval using user nominated in request field</b> Assignment at submission to user via request field, manually or via external system	✓	✓	✓	✓	✓
<b>Approval using user's Line Manager</b> Approval using user's Line Manager, as defined on User record	✓	✓	✓	✓	✓
<b>Approval hooks</b> Allows third party system integration in approval to approve & decline requests	✓	✓	✓	✓	✓
<b>Approval recalculation</b> Allows approval steps to be recalculated mid approval	✓	✓	✓	✓	✓
<b>Approval step reassignment</b> Allows mid approval step reassignment to user or user group	✓	✓	✓	✓	✓
<b>Approval reminder &amp; escalation reporting</b> Reminder approval emails sent and / or an escalation group notified	✓	✓	✓	✓	✓
<b>Auto self-approval</b> Automatic approval of Requested By user's approval step	✓	✓	✓	✓	✓
<b>Support for product changes during approval</b> Price changes & discontinued products applied during approval route	✓	✓	✓	✓	✓
<b>Support for 'out of office' delegation</b> Assigned approver can delegate future requests to an alternative user for a designated period	✓	✓	✓	✓	✓
<b>Notification emails configurable using XSLT</b> Content customization via XSLT of system generated emails	✓	✓	✓	✓	✓
<b>Simple approval via mobile device</b> Simple approval tasks can be actioned from mobile device	✓	✓	✓	✓	✓
<b>Email Subject Line replacement parameters</b> Allows more replacement parameters within subject line	✓	✓	✓	✓	✓

INTEGRATION / FULFILLMENT	7.3	8.0/1	8.2+	8.4+	8.6+
<b>Internal request fulfillment</b> (dependent on licensing) Request fulfillment capability, managed from, and visible in, the UI, allowing requests to be fulfilled using standard, repeatable processes; includes support for PowerShell.	NEW	✓	✓	✓	✓
<b>Request SLA</b> (dependent on licensing) Measurement of time taken between specified activities within workflow	✓	✓	✓	✓	✓
<b>Support for 'out of office' delegation</b> Task assignee can delegate future tasks to an alternative user for a designated period	✓	✓	✓	✓	✓
<b>External request fulfillment</b> Allows request to be sent externally for fulfillment post approval stage	✓	✓	✓	✓	✓
<b>Request export</b> Allows request to be exported to an external system, post approval complete	✓	✓	✓	✓	✓
<b>Request import</b> Allows request created in an external system to be imported into the system, with option to auto submit to approval	x	NEW	✓	✓	✓
<b>Receipting export</b> Allows receipt and return notes to be automatically exported	✓	✓	✓	✓	✓
<b>Service Catalog import / export</b> Facility to import entire service catalog or individual service from, and export to, another system (XML)	✓	✓	✓	✓	✓
<b>Request Type import / export</b> Facility to import request type definition from, and export to, another system (XML)	✓	✓	✓	✓	✓
<b>Bundle import / export</b> Facility to import bundle from, and export to, another system (XML)	✓	✓	✓	✓	✓
<b>Supplier Catalog import / export</b> Facility to import a supplier's catalog from, and export to, another system (CSV)	✓	✓	✓	✓	✓
<b>Supplier Catalog scheduled import</b> Facility to schedule the daily import of a supplier's catalog from an external system	✓	✓	✓	✓	✓
<b>Master data – manual load or scheduled file pick-up</b> Master data (Approval Matrix, Cost Center, Approver, Position Code, User, User Group / Members, Address, Division and Cost Center) import/export by individual file type (CSV or TXT)	✓	✓	✓	✓	✓
<b>Integration Setting parameters</b> Site wide (tenant exceptions) parameters to control integration components. User level (read-only or editable by user) exceptions (new)	x	x	NEW	✓	✓
<b>Active Directory sync</b> Facility to import users and group relationships from Active Directory and persist synchronization via a daily task	✓	✓	✓	✓	✓
<b>Federated Single Sign-On</b> Federated Single Sign on via the WS-Federation Passive Protocol; use of SAML tokens for claims transfer	x	x	NEW	✓	✓
<b>Reporting Services</b> (dependent on licensing) Microsoft® Reporting Services available for reporting. Some core shipped reports available out of the box	✓	✓	✓	✓	✓

RECEIPTING	7.3	8.0/1	8.2+	8.4+	8.6+
<b>Goods receipt note entry</b> Line item quantity receipting from request summary; support for 'returned' items	✓	✓	✓	✓	✓
<b>Auto receipting</b> Auto receipt item conditionally using supplier, commodity type or value	✓	✓	✓	✓	✓
<b>Asset capture on receipt</b> Record up to 3 asset references when receipting; included in receipt export	✓	✓	✓	✓	✓
MISCELLANEOUS	7.3	8.0/1	8.2+	8.4+	8.6+
<b>Request type copy</b> Ability to copy request type definition	✓	✓	✓	✓	✓
<b>Custom Task plugins</b> Ability to integrate more closely with task engine. (v8.5)	x	x	x	NEW	✓
<b>Business Time</b> Definition of business days of the week and working hours within day. Applied to any generic day calculations e.g. approval reminders, Internal Workflow SLA and tasks	✓	✓	✓	✓	✓
<b>System Email control</b> Ability to control which email types are issued to the organization	✓	✓	✓	✓	✓
<b>Theme editing via UI</b> Ability to theme the Front Office site to allow the corporate profile to be represented	NEW	✓	✓	✓	✓
<b>License management</b> License level control of product, including seats & range of functionality	✓	✓	✓	✓	✓
<b>Mobile device support</b> Simple approval via mobile device	✓	✓	✓	✓	✓
<b>Multi-Tenant support</b> Ability to host multiple tenants within a single Front Office	✓	✓	✓	✓	✓
<b>Support for Unicode</b> Support for extended character languages	✓	✓	✓	✓	✓
<b>Customized help text</b> HTML file created by client, to allow appropriate help to be provided	✓	✓	✓	✓	✓
<b>Ability to hide main menu</b> Via new theme setting	x	x	x	x	NEW