

# BOS Manager's Guide

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# BOS Overview and General Navigation

## Landing Page



## Logging In To BOS

BOS utilizes the University of Utah's Duo authentication for logging in. To log in, click one of the two 'Log In' buttons, either on the top navigation bar or in the middle of the page. This will attempt to authenticate against the University of Utah's system - so if you already have an active log in, you will automatically be directed to the BOS home page, otherwise, it will redirect you to the DUO login page.



Welcome to the Health Science Cores *Budget and Ordering System*

→ Log In

## Home Page

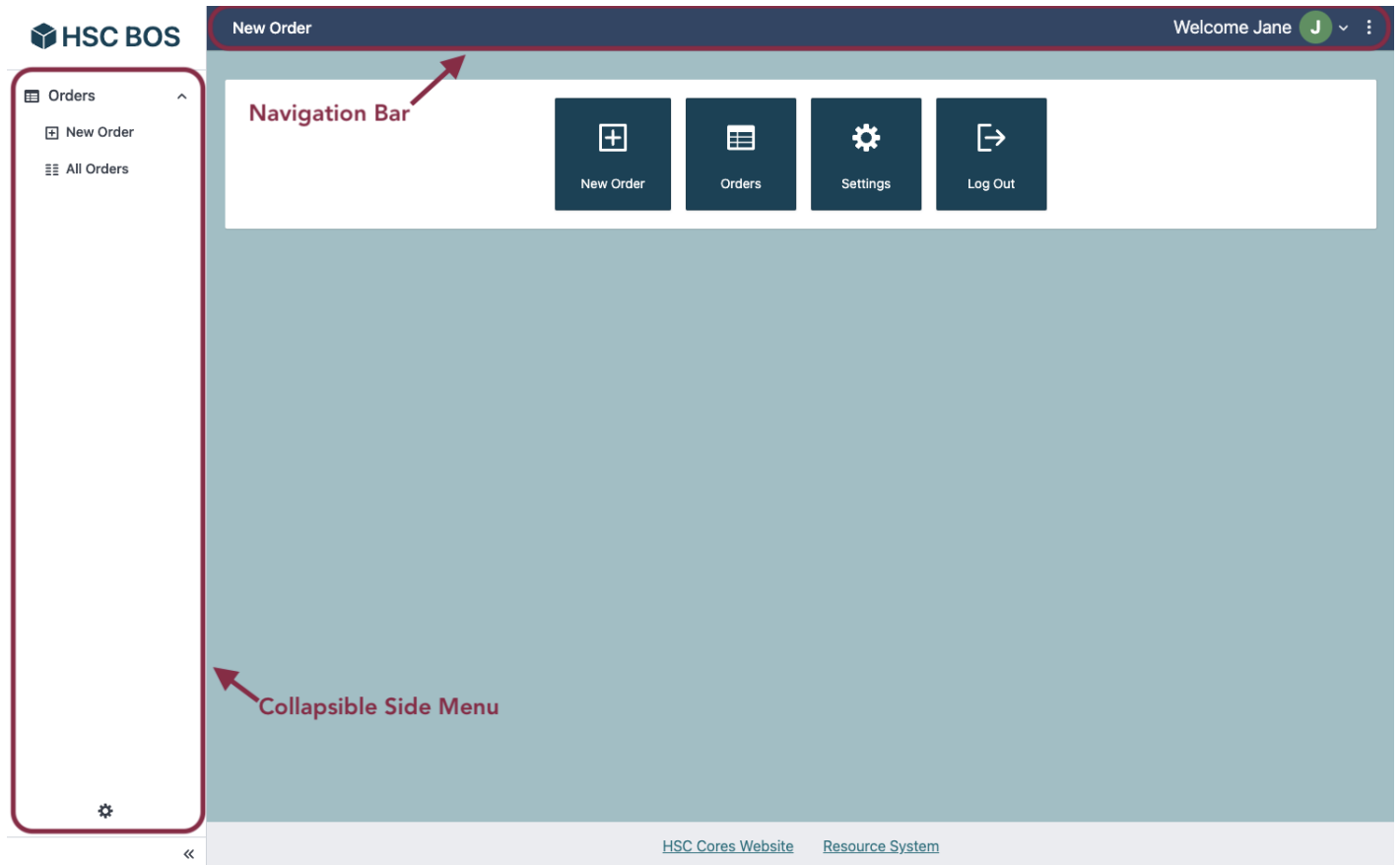
The BOS Home Page has a list of tiles that link to common tasks. *These links will vary depending on your role(s).*

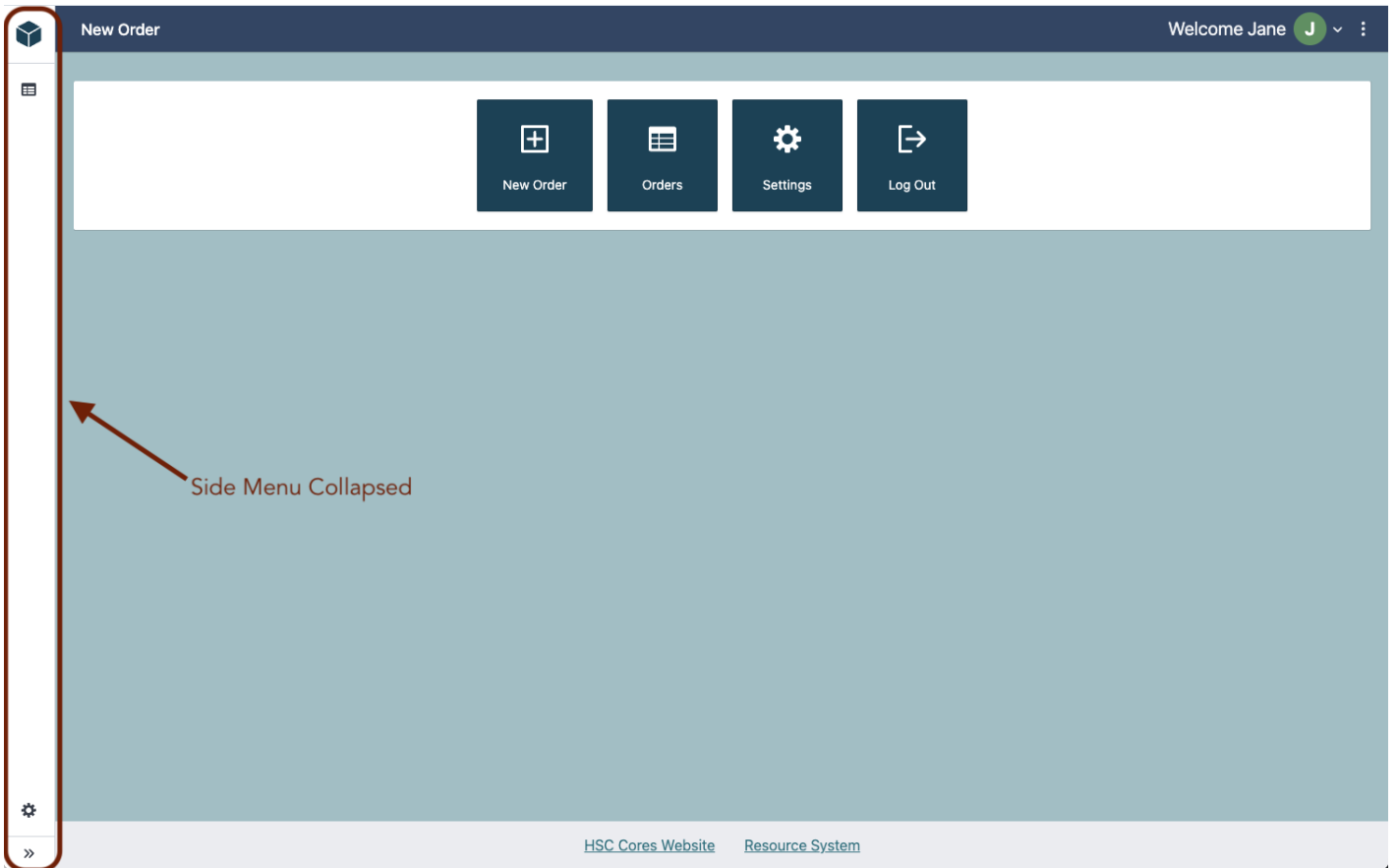
A screenshot of the HSC BOS Home Page. The top header is dark blue with the HSC BOS logo on the left, "New Order" in the center, and "Welcome Jane J" on the right. A left sidebar contains a menu with "Orders" (expanded), "New Order", and "All Orders". The main content area features four dark blue tiles: "New Order" (with a plus icon), "Orders" (with a list icon), "Settings" (with a gear icon), and "Log Out" (with an exit icon). The footer is light blue with a gear icon on the left and links to "HSC Cores Website" and "Resource System" on the right.

**Menu items along the top and side navigation bars along with the link tiles seen on the Home Page will vary depending on your BOS role(s).**

## BOS Navigation

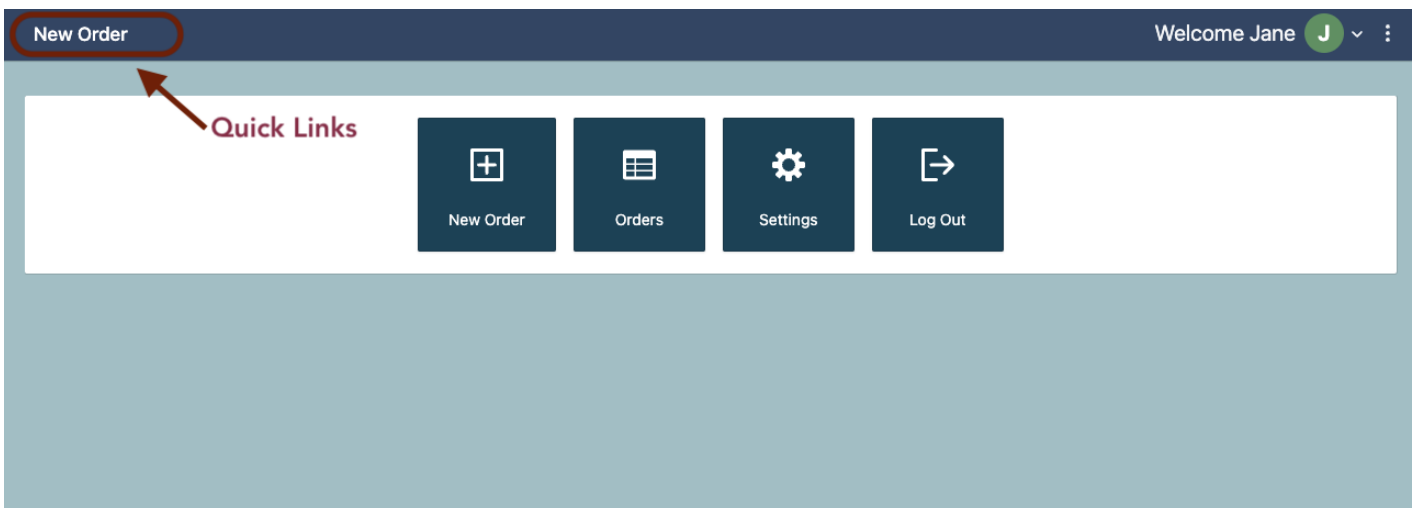
The BOS System is designed to be easily navigable. There is a **collapsible side menu** along with a **navigation bar** along the top. The side menu, expanded by default, can collapse or expand using the double caret button at the bottom of the menu. *The menu items will vary depending on your role(s).*



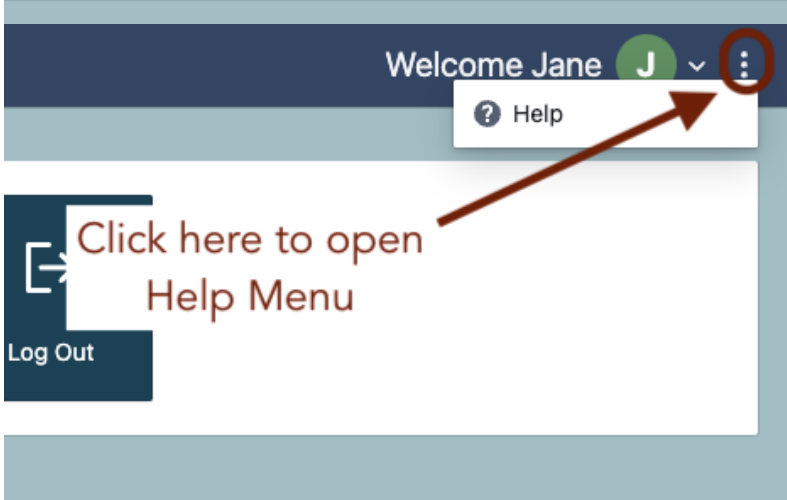
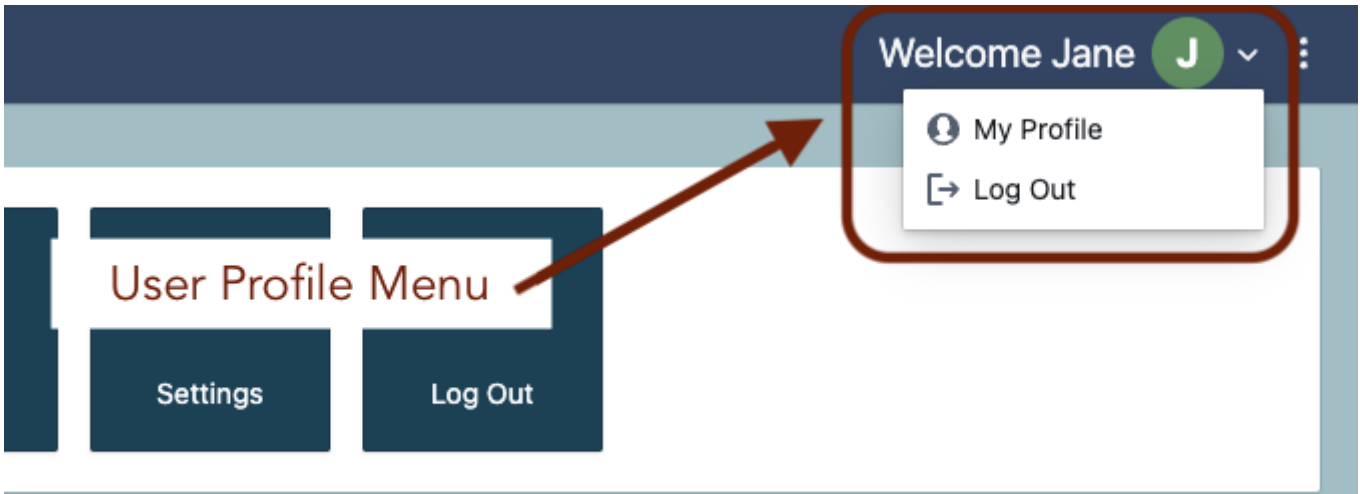


## Top Navigation

The top navigation bar includes **Quick links** along the left. *These links will vary depending on your role(s).*



Along the right, the navigation bar has a **User Profile Menu**, and a **Help Menu** (accessed by clicking the 3 dot icon on the far right).



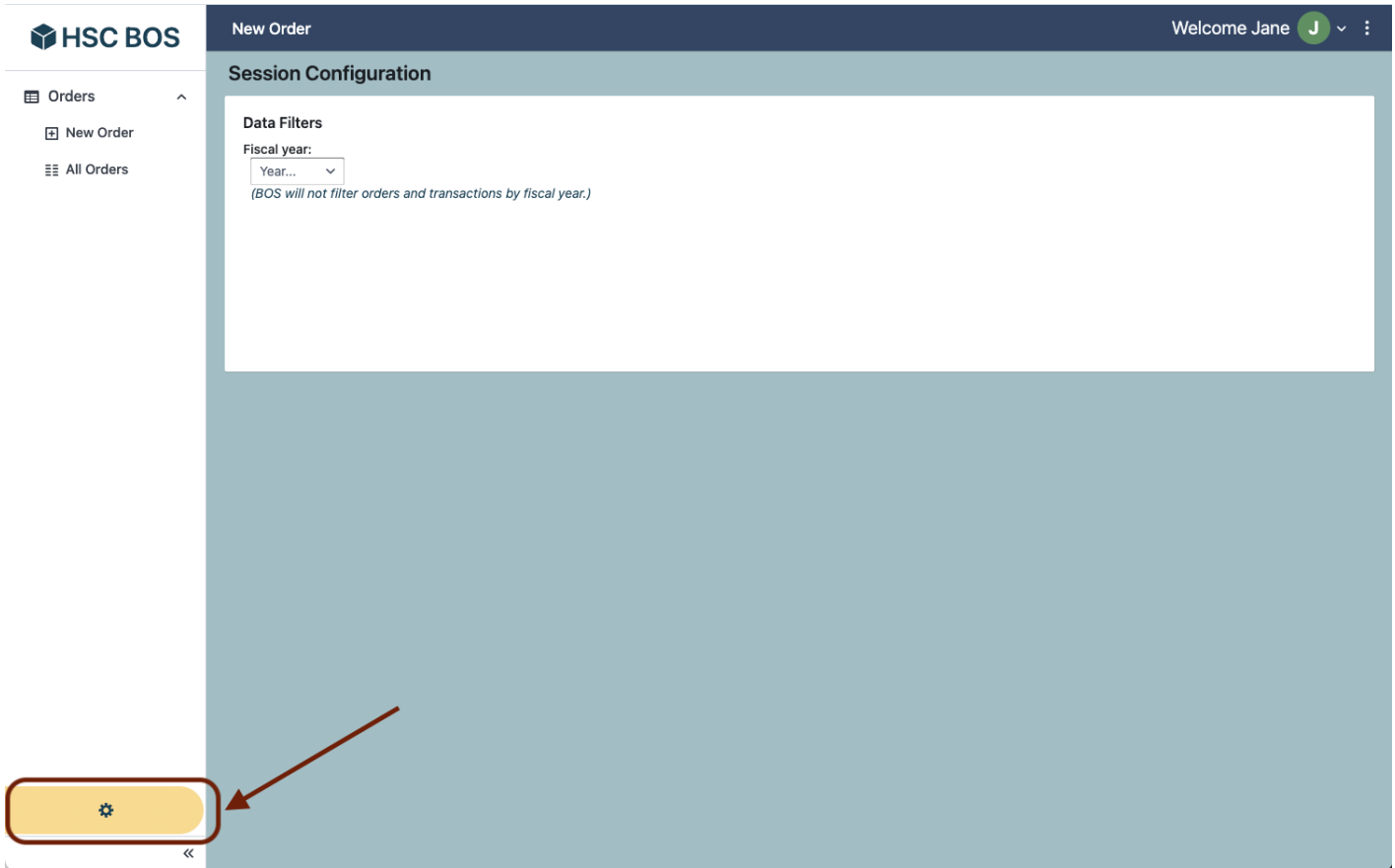
The help menu link will direct you to the **Help Page** which has a link back to this BOS BookStack shelf along with some email links as seen below.

The screenshot displays the HSC BOS web application interface. At the top left is the HSC BOS logo. The top navigation bar includes 'New Order' and 'Reports' links, and a user profile for 'Jane' with a dropdown arrow. A left-hand navigation menu lists several categories: 'Orders' (with sub-items 'New Order' and 'All Orders'), 'Transactions' (with sub-items 'All Transactions' and 'Reports'), 'Accounts' (with sub-items 'All Accounts' and 'Budgets'), 'Administration', and 'Core Facilities'. A gear icon for settings is located at the bottom of this menu. The main content area is titled 'Help' and features a 'BookStack Documentation' link. Below this, a section titled 'Still need help?' lists two categories of issues: technical problems (with an 'Email the developers' link) and administrative tasks (with an 'Email the admin office' link). At the bottom of the page, there are links for 'HSC Cores Website' and 'Resource System'.

(Note that the navigation menu items on this screenshot are those available to **Lab Managers**.)

# BOS Session Configuration

You can update your BOS session configuration from the **Session Configuration Page** accessed by clicking the **gear icon** on the bottom of the Side Navigation Menu.




Here, you can opt to have BOS filter orders/transactions by fiscal year. Just click the arrow in the Fiscal Year drop down and then select a year.

## Session Configuration

### Data Filters

Fiscal year:

- (Filter orders and transactions by fiscal year.)
- 2024
- 2023
- 2022
- 2021
- 2020
- 2019
- 2018
- 2017
- 2016



If a year is selected, the note will be updated and a clear button will become available. This will cause BOS to automatically filter orders and transactions. *This filter does not apply to Reports (accessible by those with permission only).*

## Session Configuration

### Data Filters

Fiscal year:

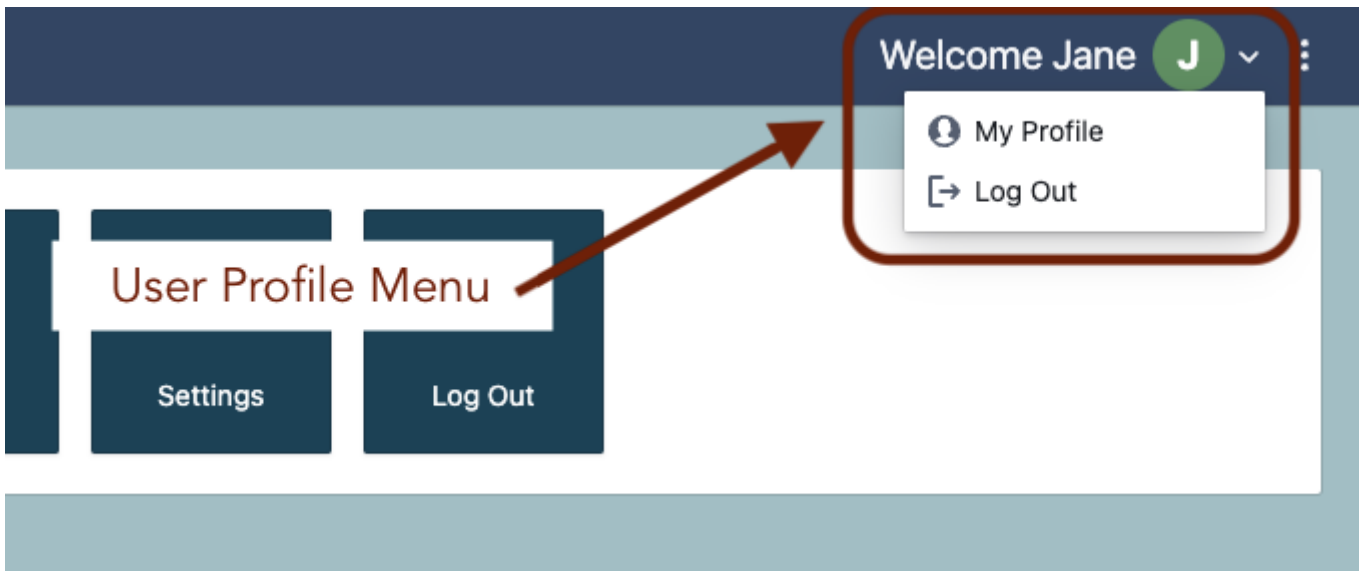
 

*(BOS will filter orders and transactions to fiscal year: 2024)*

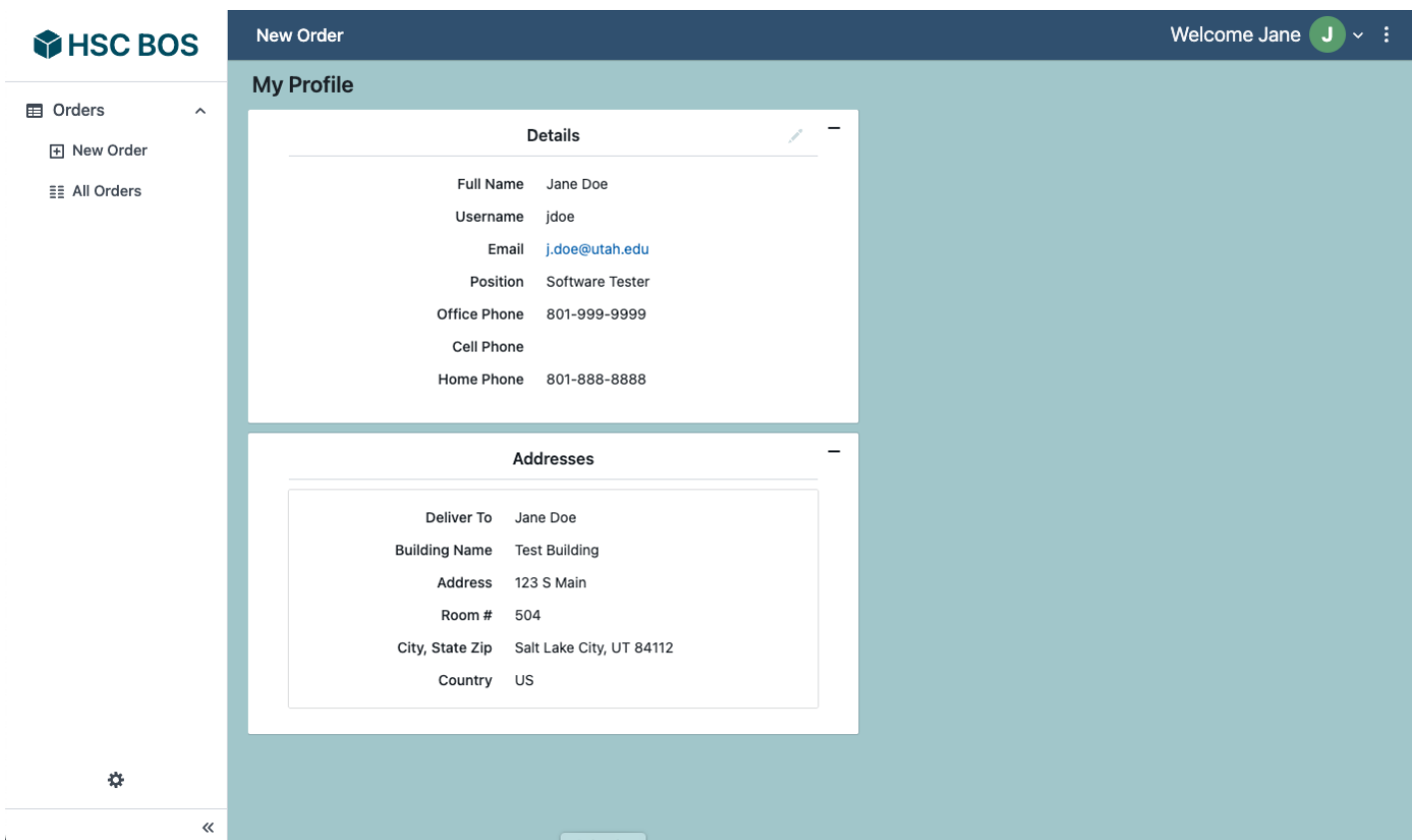


# User Profile

You can view and (partially) edit your own user information in BOS from the **User Profile Page**. You can access this page from the top navigation bar.



The profile page shows your profile information in 2 boxes. The first contains your user details, the second displays all addresses on file for you.




You can edit *some* user details in the **editable details box** (see details about how these work below). Fields that can be update include name, email address, position and phone numbers. Username is the user's University of Utah UNID. **Addresses** can be *added* or *edited* by the HSC Cores' [Admin Office](#); contact them to make any necessary changes.

## BOS Editable Detail Box

Throughout BOS, you may encounter boxes of information that is editable. These boxes can be recognized by the pencil icon in the upper right corner.

To edit information in an editable details box, click the pencil icon in the corner. This will toggle the box to be in its **edit state**.

### My Profile

Details		Click to edit 
Full Name	Jane Doe	
Username	jdoe	
Email	<a href="mailto:j.doe@utah.edu">j.doe@utah.edu</a>	
Position	Software Tester	
Office Phone	801-999-9999	
Cell Phone		
Home Phone	801-888-8888	

When a detail box is in its edit state, editable fields will become fillable. You can exit the edit state by clicking the eye icon in the corner of the box. *This will not save any changes*, but will toggle the box back to a **view only state**.

## My Profile

### Details

Done editing

Full Name	Jane Doe	X
Username	jdoe	X
Email	j.doe@utah.edu	X
Position	Software Tester	X
Office Phone	801-999-9999	X
Cell Phone		
Home Phone	801-888-8888	X

If updates are required, you can follow up with any necessary changes. When one or more fields have been changed, save and undo buttons will appear.

## My Profile

Name Updated

### Details

Full Name	Jane P. Doe	X
Username	jdoe	X
Email	j.doe@utah.edu	X
Position	Software Tester	X
Office Phone	801-999-9999	X
Cell Phone		
Home Phone	801-888-8888	X

Undo

Save

Click 'Save' to save the changes; a confirmation notification will appear at the top of the screen upon success.

User Saved Undo

- Orders ^
- New Order
- All Orders

### My Profile

#### Details

Full Name	Jane P. Doe	X
Username	jdoe	X
Email	j.doe@utah.edu	X
Position	Software Tester	X
Office Phone	801-999-9999	X
Cell Phone		