Basic Requisitions

Enables basic routing policies (up to 3 levels of approval, and routing based on total requisition value only). This module is suitable for very simple routing needs only. It may require a lot of maintenance since approvers need to be manually entered in each policy, and it is likely that a separate policy would need to be defined per department in order to define the various approval hierarchies for those departments

The Advanced Routing module is required if routing is more than 3 levels deep, and when routing criteria is based on anything other than requisition total dollar amount (e.g., routing to the IT department for IT items, routing to the CFO for capital expenditure items, or where project related purchases need to be forwarded to the project manager, etc.). In conjunction with the Customization module, it is possible to define a department hierarchy (e.g., Manager, Director, VP) at the department level, and use these fields in this table as the "who" to route requisitions to, rather than having to hard code rules (routing policies) per department.

Customization Module

Text Customization allows users to change labels and messages across the system, at the global level, department level or user level.

View Definition allows users to:
> change any grid views,
> change lookups to the backend application, by adding columns (up to 12), removing columns or changing the order that columns appear in,
> create user defined lookups can be created to point to any table/view. These lookups can be linked to user defined field.
> restrict lookups (e.g., GL account, vendor, item) so that certain users or departments only see those values that are relevant to them

The **e-mail notifications** that are triggered by various events can be modified.

User fields can be defined at the header or detail level of a requisition, as well as at the ReQlogic Catalog Item, User and Department levels. These user fields may be used by the routing engine, or passed to the Purchasing module for additional reporting.

The **User Interface** can be modified so that users can:
> hide fields
> make fields required that are not required by default
> make fields read only
> set default values in fields
> associate validation lists with user fields

These modifications can be done at the global level, by department or by user to customize the user interface.

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Advanced Routing Module

Without Advanced Routing Policy Module, users can create routing policies with three levels of approval, where each level is based on the total dollar value of the requisition (i.e., individual requisition lines are not evaluated).

With the Advanced Routing Policy Module, users can create routing policies with **unlimited levels** of approval, where the criteria for determining where each requisition is routed for approval can be based on **any field** in any table in the Purchasing or ReQlogic modules, e.g., the item type (such as capital items or IT equipment), the GL account, the department, as well as dollar value, can determine who a requisition will be routed to for approval. Approval levels can be defined in parallel as well as sequentially. With the Advanced Routing Policy Module policies can also **branch out** to other policies.

In addition, certain individuals can also be sent FYI notifications via e-mail when certain requisitions are submitted. This functionality is not available in Basic Requisitions.

How to know if you need Advanced Routing versus Basic Routing:

1. If you need more than 3 levels of approval, Advanced is required.
2. If you don't want to have to maintain a separate approval policy for each department where you need to hard code the names of the 3 different approvers where applicable (a lot of maintenance), then Advanced is required. Advanced can refer to a field in a table to find the approver's id.
3. If you need to be able to send different lines on the requisition to different people based on some characteristic of the line, not only the dollar amount, then Advanced is required (e.g., IT items to the IT departments as well as the normal departmental dollar hierarchy, Capital items to a financial analyst, chemicals to the safety officer, projects to a project manager, over budget lines to the budget owner, office supplies to the office manager, etc.)
4. If you want to be able to branch out to different policies, **or** have an IF, AND routing requirement then Advanced is required.
5. If you want to be able to send an FYI to someone when an event occurs you need Advanced.
6. If you need to route a requisition for approval based on anything other than the total dollar value of the entire requisition, the Advanced is required. (see also #3 above)
7. If you want reviewers to be able to modify a line they are reviewing, Advanced is required.
8. If you want reviewers who are reviewing a requisition with more than one line on it, and want to allow the reviewer to approve some and reject other lines in the requisition, rather than having to approve or reject the entire requisition, then Advanced is required.

Project Module *(applies to Axapta, Solomon and Great Plains only)*

This module will enable project functionality within ReQlogic. This module is required if the backend application (Solomon or Great Plains) has the project module installed and the user needs to be able to add projects or tasks on the requisition line, and have them flow all the way through to the Project module.

Multi-Company Module *(applies to Solomon and Axapta only)*

This module will enable multi-company functionality within ReQlogic. This module is required if the backend application has the multi-company module installed and the user needs to be able to enter different company ids on the requisition line, and have them flow all the way through to the General Ledger.

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Multi-Currency
If the multi-currency module is being used in the backend application, and multicurrency requisitions and Purchase Orders are required, then the Multi-Currency module is required.

Catalog Connector
The Catalog connector module has two aspects:

Firstly, it enables users to select items from a copy of an externally maintained catalog. For example, if a vendor can provide users with a soft copy of their catalog, that catalog does not need to be imported into either the ReQlogic catalog or the Inventory module. Instead users can connect to it in its native format from *within* ReQlogic.

Users can **also** connect to a vendor's catalog on their website in real-time using "**Punchout**" technology. Punch Out allows users to securely access a supplier's online web store while they are using their existing procurement application (e.g., ReQlogic). The requester uses the supplier's web site to search and select items for purchase and then fills a shopping cart. The shopping cart of items is then sent via the Internet in real time to ReQlogic. This allows users to "punch out" from within ReQlogic to a vendor's website, create a shopping cart of items, check out, and have those items transferred into a requisition in ReQlogic, and have those items submitted for approval using the routing rules defined in ReQlogic.

Budget Control

This module allows budget checking against either the General Ledger budget, the Project Budget (for Great Plains and Solomon only), Encumbrance Management (Great Plains) or the ReQlogic budget.

The latter allows the creation of unique purchasing budgets, which can be defined by a wide variety of criteria including GL Account, Department (sub-account), Project, Task/Cost Category, Item id, Item Class, Vendor, User id and Site ID. In addition, up to 8 user-defined fields can also be added to the criteria.

A budget may be based on a dollar amount, a quantity or both. Budgets are time sensitive, and may be defined at an annual level, at a period level, or both.

Regardless of the source of the budget there are three different levels of enforcement; no enforcement, a warning only and a rejection message. Even if a budget is defined with no enforcement, or with a warning message only, the reviewers will know that a particular requisition line is over budget, by means of a visual cue. They can then make a decision to either approve or reject that line.

Budget commitments may be used as routing criteria by the Advanced Routing engine.

On-line Receiving
This (optional) module facilitates a de-centralized approach to receiving goods, whereby users at remote sites can create the receiving transactions from their desk using ReQlogic's easy-to-use web interface, and facilitating the invoice matching process. (ReQlogic creates a receipt transaction that is automatically sent to the back end, **with the exception of Navision**). Goods can also be received directly in the backend Purchasing module.

Request for Quotes (RFQ)
This module allows a user as part of the requisition workflow process to send items out for quotes to unlimited number of vendors, who are notified via e-mail that they have a request to respond

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to. These suppliers do not need to exist as vendors in the backend application to be selected. The suppliers in turn logs in to a secure site (the "Supplier Portal") and responds to those bids. The ReQlogic user or buyer selects the winning bid (the history of all bids, including the winning bid, is saved) and the requisition continues on its approval workflow path to purchase order creation.

Expenses Reports Module
This module allows employees to process their expense reports using the robust workflow engine within ReQlogic to define the appropriate approval rules. Approved expense reports create accounts payable vouchers in the backend Accounts Payable module.

Expenses Reports Bundle
For users who only need expense entry and approval but *not* the requisitioning functionality, this offering combines the functionality of the core module to facilitate the processing of employee expenses. If the requisition functionality is subsequently required the customer can add this functionality at the cost differential of the original modules (Basic Requisition AND Employee Expenses)

Multiple Languages
If multiple languages are required at the user level, they can be purchased separately. Examples include French, Spanish and German.

Named User
Licensing in ReQlogic is by module and by the number of named users (***not concurrent users***). A requester, a reviewer or a buyer would each be a named user in ReQlogic terms. Named users can be purchased in any quantity. There is also an unlimited named user option, which starts to be cost effective at over 400 named users.

Once a named user leaves the company, you can re-use that license by marking that user as "inactive".

If you are tempted to limit the number of named users you purchased, for example, by having requisitions go through a single person in a department, you will loose the full visibility to a requisition and to its current status, that is otherwise available to users who log in as themselves and submit their own requisitions.