HIGHLIGHTS

REQLOGIC VERSION 8 ENHANCEMENTS:

- GENERAL
- TIMESHEETS
- ROUTING ENGINE
- BUYER TASKS
- EXPENSE & INVOICE
- RECEIVING
- REPORTS & INQUIRIES
- TECHNOLOGY/SYSTEM
- SDK

The ReQlogic™ team is excited to announce the release of ReQlogic V8.0. This new release boasts numerous enhancements that offer even greater functionality, technology, stability and user interface operations to this already dynamic software. Most of the enhancements in V8.0 make the functions even more user-friendly and allow tasks to be performed even more quickly. However, there are also some significant enhancements designed to improve the way businesses run.

ReQlogic users will want to take advantage of the new features in V8.0 and enjoy the benefits that this new release brings. To do so, you must upgrade from your current ReQlogic version. To be eligible to receive and upgrade to V8.0 you must be current on your ReQlogic Enhancement Plan.

GENERAL ENHANCEMENTS	
Document Scanning and Scanned Invoice Processing*	The new Scanner Interface enables users to scan paper documents and attach the scanned images to ReQlogic documents. Paper invoices can also be scanned and processed into ReQlogic invoice documents with the scanned images as attachments.
Attachment Export	With this enhancement, administrators can configure ReQlogic to automatically export all attachments at the time of PO creation (for requisitions) and AP Voucher creation (for invoices and expenses). Files are exported to a specified directory and paired with XML documents that contain meta data about the attachment. The export can be used to integrate attachments with other document management systems or for other purposes.
Department Based Access Rights	Six new access rights give users the ability to see and/or access documents based on their department. These access rights apply to requisitions, expense documents and vendor invoice documents.

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GENERAL ENHANCEMENTS	
Read Only Access Right	This enhancement provides the ability to grant users access to see all documents but prevents them from being able to make changes. This enhancement is a good fit for organizations with users that need to see all documents but do not want to allow them to make changes or take action, such as recalling.
PO Events on Status Tab	PO-related events will display on the requisition's Status Tab. These events are: PO Emailed, PO Printed and PO Transmitted.
Import Message	A new pop-up message will display when importing a document when a line is not created because of failed validation. The message will indicate how many lines failed.
Currency Included in Requisition Import	Requisition Import now enables import of currency for requisitions that are not in base currency.
Import Multiple Requisitions	Multiple documents can now be imported from a single spreadsheet with the Requisition Import function. An indicator column has been added to the requisition import spreadsheet to identify document breaks.
Favorites Enhancements	The standard item and vendor lookups are enhanced by adding a visual queue if the item has been marked as a favorite. Lines already marked as favorites will have a light green background and the Add to Favorites button on the right will now only be visible for lines that are not already favorites.
Enhanced Notes Icon	The notes icon has been enhanced to make it more visible when a note exists. The icon that indicates the existence of a note now has a yellow background to make it easier to recognize.
Inventory Fulfillment Transaction	This enhancement provides a tighter link between the ReQlogic transaction and the created issue transaction in Microsoft Dynamics GP and Microsoft Dynamics SL. New fields have been added to the inventory fulfillment table. This linking enables better reporting capabilities for custom reports as well as other future functionality and client-specific customizations.
Punchout Indicator	A new flag in the requisition line table indicates if a line came from Punchout. Copying the line does not copy this flag.
Separate Batch Counter (Microsoft Dynamics GP only)	This enhancement adds separate batch prefix and number counters for expenses and invoices so that each module can have its own batch number. For invoices, an option also has been added to have one batch per user to group each AP user's invoices separately.
Expense Items on Requisitions	An enhancement to the ReQlogic Catalog allows the same items to be used on the three document types (requisitions, expense documents and vendor invoice documents).

GENERAL ENHANCEMENTS	
Project Defaults for ReQlogic Catalog Items	This enhancement adds a default Task or Cost Category to the ReQlogic Catalog. The Task or Cost Category defaults when a project is selected on the document line and the Task or Cost Category is valid for the project.
Microsoft Dynamics SL Header User Fields	For Microsoft Dynamics SL invoices and expenses, this enhancement sends the ReQlogic header user fields to the voucher header. The enhancement adds to the document line user fields that already go to Microsoft Dynamics SL.
NAV 2009 R2 Support	ReQlogic 8.0 is compatible with NAV 2009 R2.

TIMESHEET ENHANCEMENTS	
New Batch Per Period	A new checkbox option (Append Period Nbr to Batch Nbr) has been added to the Time Setup page. When selected, project time and expense batches will auto append the period number to the batch number. This will group documents by period. When appending the period number, the process will use a maximum of 13 characters from the standard batch number, and then append the period number.
Weekly Timesheet Support	This enhancement enables the creation and submission of weekly timesheets. When active, this supports time periods that are weekly, and is not compatible with other time period setups.

ROUTING ENHANCEMENTS	
Require Comments	An option has been added to the setup of routing steps to require a review comment when a reviewer makes changes to a document then approves it.
Prevent Zero Price Approval	An option has been added to the setup of routing steps to prevent an approval with zero price. This ensures that a specific approval step must assign a price before moving forward or re-routing. A new checkbox option (Can approve zero price) is available on the routing step. If not checked, the approver must enter a price. For implementers, the upgrade process sets the default value for this new checkbox to checked to be compatible with previous functionality.

ROUTING ENHANCEMENTS	
FYI Routing for All Users	This enhancement expands FYI routing to all users. Currently, a user must be marked as a reviewer to receive an FYI notification.
Policy Options by Document Type	"Add ability to set routing policy options at header level by document type (Req/Exp/Inv/Time). Checkbox options available on the Policy header are now broken down by document type. Options can be different per document type. For example, line level approval can be allowed for requisitions, but not expenses"
New Routing Criteria: "Not In"	The ReQlogic routing engine becomes more flexible with the addition of the "Not In" operator. The "Not In" operator can be used with a single value or a comma separated list of values.
Re-routing Based on Line Amount	Administrators can now enter an amount criteria for the Line Total on the General Settings page, and re-routing will be triggered when a change in line total exceeds the specific amount. With this enhancement, note that a percentage must also be specified if the Line Total criteria checkbox is checked because a percentage of zero (0) indicates any percentage or any change in line total will trigger a re-route. The typical use of this enhancement is to specify a percentage, then as applicable, to specify an amount as well.
Response Button Placement	For the Question and Answer functionality, a second Response button has been located next to the response text box and uses a different color to make it more visible.
Required Field Validation During Routing	The routing engine has been enhanced to check that all required fields have been entered at the time of approval. The routing engine will use the new user interface customization layer for the approver (not the requester). If multiple customization layers exist, the order of priority from highest to lowest is Approver Group, User, Dept, Group. This enhancement applies to Requisitions, Expense Reports and Invoices.

BUYER QUEUE ENHANCEMENTS	
Buyer Notes Restriction	An option has been added to restrict access to Buyer Notes to users who are marked as "Buyer". This enables the buyers to exchange notes that only they can see.
Buyer Communication with Requester	To enhance buyer communication with requester, the Buyer Note pop-up now has the option to send the note in an email. A drop-down box will list the users that can be selected. The list of users includes the requester and the buyers that are assigned to the requisition. The list will automatically exclude the user who is editing the note. If the Buyer Note is a header note, all line buyers will be included. If the note is a line note, only the buyer assigned to the line is included. The email will be based on a new email template.

EXPENSE ENHANCEMENTS	
Company Account Processing	This enhancement provides the ability to send company account transactions to AP for payment creating an AP voucher. This creates a mechanism for automatically handling expenses that are charged to company accounts, such as a company credit card. As part of this enhancement, the Vendor Invoice module will be used for paying company account vendors. Approved company account transactions will accumulate in the ReQlogic Vendor Invoice module in an open Invoice document. An AP clerk can then control when the invoice is sent to AP to pay the company account vendor. This enhancement also will enable Expense Types to be maintained in the ReQlogic Code Setup page.
Import Project Data with Expense	The Expense Import function adds the ability to enter Project values during the import of credit card transactions.
Import to Existing Expense Document	The Expense Import function adds the option to append to an existing expense document.

INVOICE MODULE ENHANCEMENTS	
Invoice Match Enhancements	The standard Invoice Match fields have been added to the document header and line as their own fields and will no longer use user-defined fields. For upgrades, implementers just need to hide the user-defined fields. Navigation and lookups also have been updated to be invoice match specific.
Vendor Invoice Freight and Misc. Costs	This enhancement adds handling for Freight/Miscellaneous Cost to vendor invoice documents. Users enter Freight and/or Misc. Cost on separate lines with items specifically set up for this purpose in the ReQlogic Catalog. The enhancement also sends the Freight/Misc. Cost to the appropriate fields on the voucher and sets the distribution type to Freight/Misc. instead of Purchase. This feature applies only to the AP option, not to receipt invoices.

RECEIVING ENHANCEMENTS	
Barcode Receiving*	Receiving transactions now can be generated in ReQlogic through the use of barcoding.
Receiving Lot and Serial Items	For Microsoft Dynamics GP and Microsoft Dynamics SL only, this enhancement adds receiving for serial and lot controlled items.

BUDGET ENHANCEMENTS	
Can View All Budgets Access Right	New access resources for "Can view all budgets" and "Can change all budgets" have been added. The "Can change all budgets" access enables users to create budgets on behalf of other users as well.
Add More User Fields to Budget Criteria	This enhancement adds support for user-defined fields 11-14 to the budget criteria.
Distribute Budgets to Non-standard Budget Calendars	The "distribute" function on the Budget Maintenance page has been enhanced to be compatible with non-standard budget calendars, such as calendars with four periods (quarterly).

EMAIL ENHANCEMENTS	
Routing Description in Email	Routing related email notifications now can include the routing policy step description in email text. The administrator can add the new email field: %ROUTING_DESCRIPTION%.
User Name in Email	The user name now can be included in emails via the %OWNERNAME% field. This generically populates the name of the user that triggered an email. In the case of routing questions, this is the name of reviewer who sent the question. Emails not triggered by the application, but instead sent via the SQL Agent, such as buyer changes email, do not include this enhancement.
Email URLs in General Settings	URLs that can be used in links within emails can be defined in two new General Settings fields: "App URL" and "Mobile URL". This removes the need to hard code URLs in the email templates.
Attachments Accessed from Email	Attachments can now be accessed from the routing email. The email field %ATTACHMENTS% can be added to the email template.

REPORT ENHANCEMENTS	
Transmitted Via CXML Checkbox	This enhancement adds a checkbox on the Purchase Orders page to track whether a PO has been "Transmitted via cXML". This checkbox is set automatically after processing has taken place, but can be manually toggled if needed. The PO Number lookup can be customized to display this indicator.
Status Tab on Documents	Document reports for requisitions, expenses, vendor invoice and timesheets now will contain routing details from the document's Status tab.
PO Report Changes (Microsoft Dynamics GP only)	The PO report from ReQlogic will have the FOB box populated. Because Microsoft Dynamics GP stores the FOB value on the line, the default report will display the value from the first PO line. The Currency Id also has been added to the standard report. A special RPT file is no longer required when using multi-currency

TECHNOLOGY/SYSTEM ENHANCEMENTS	
Track Customizations and System Configurations	This enhancement adds the ability to track what customizations and system updates are currently installed. This information will automatically be tracked in a new table based on processing through the ReQlogic Utilities. A new System Updates report will now exist on the Administration menu to display the list of all system updates. This report can be used by support to determine what has been installed, when, and in what order.
Custom Stored Procedure Option in Routing Criteria	This enhancement adds a criteria option to the routing policy step that is based on custom a stored procedure in which complex criteria can be built. A new policy step type called "Stored Procedure (SDK)" is now available. When selected, the administrator is able to specify a stored procedure name for determining criteria. This enhancement is considered part of the SDK and provides maximum flexibility for developers to control the routing engine. A sample stored procedure named "XW_SDK_ROUTING_Criteria_Sample" will be provided as an example.
Secondary Status Field	A Secondary Status field has been added to XW_ReqHdr table that enables the SDK to assign custom secondary statuses.
Create Vs. Approve Customizations	This enhancement splits Data Field Customizations into "Create vs. Approve", or "Requester vs. Approver". A new User Setup field named "Group ID (Review)" can be used to assign a customization group to approvers that will be used only when in approval mode. This field is optional.
Add User Fields to ReQlogic Catalog	User-defined fields 11-14 have been added to the ReQlogic Catalog.
Date and Numeric Columns in View Definitions	This enhancement adds the ability to format date and numeric columns in view definitions as dates or with a specified number of decimals. The enhancement will add a text box named "Mask" to the view definitions page for each column. The value would be a SQL function such as Date() or Str().
Company Name Stored in RLSystem Database	This enhancement moves storage of the company name to the RLSystem database. This change will facilitate restoring production databases as test databases. A new column on the ReQlogic Agent tab grid called "Company Name" will be used to enter the company name.
New Department ID Field on Document Header	A schema modification adds the Department ID to the header. The default value will come from the user, but can be changed. The field will initially be set to hidden.
Upgrade Data Field Customization Automatically	The upgrade process will update all Data Field Customization records by looping through all existing levels and adding changes to them all. With previous versions, only Data Field Customization records at the Global level were modified.

TECHNOLOGY/SYSTEM ENHANCEMENTS	
Expanded Parameter Field Enhancements	Enhancements to the parameter fields on the General Settings page expands these fields from 20 to 200 characters, and adds message labels that enable an implementer to give the parameters meaningful labels based on usage.
Installation Files Grouped by Microsoft Dynamics ERP	ReQlogic installation XML files are now separated by Microsoft Dynamics ERP in subfolders. Depending on the Microsoft Dynamics ERP database selected, the XML file lookup in the ReQlogic Utilities will only show the XML files that are relevant to the ERP.
Report Viewer SDK	This enhancement adds support for reports created using Microsoft Report Viewer. While the primary reporting engine in ReQlogic 8.0 is Crystal Reports, there are advantages to each type of report engine. The developer is advised to evaluate the best reporting tool based on each report needed.

**Part of this functionality was originally released in a Version 7.0 service pack.*

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