

ReqConnect

Business-Ready Application for Purchase Requisition Processing



ReqConnect is part of our docs for Deltek Business Automation Suite of products. It offers a completely automated purchase requisition system that can manage purchasing requests for your project-based business.

REQCONNECT OVERVIEW

Using a fully functioning document management and workflow system, ReqConnect provides all of the automation and controls your organization needs to reduce paper, time and most importantly, cost in the purchasing process.

APPLICATION FEATURES

ReqConnect provides for the creation, routing, administration and tracking of all purchase requisitions. It completely automates the requisition process while eliminating the use of paper. ReqConnect performs all of these functions while maintaining synchronization with your Deltek database through direct integrations.

Submit Requisition – Users can complete and submit purchase requisitions over the Web. The requisition form is integrated directly with your Deltek Costpoint® database.

Review Requisition – Routes the requisition to designated reviewers based on pre-defined business rules. Once reviewed and confirmed, the requisition is routed for approval.

Approve or Decline – Based on configured business rules, the requisition is automatically routed through an automated workflow to the requisite approvers for their decision.

Notifications - During requisition routing, automatic e-mail notifications can be configured and sent to the requestor, buyer, and approvers based on status changes assigned during processing.

Monitoring, Retrieval and Reporting - A complete audit trail is maintained during the life of a requisition—capturing routing steps, user actions and status changes. All audit history can easily be accessed and viewed at any time.

#	Qty	Item Code	Item Description	Vendor	Unit Price	Amount
1	12	001TECRAR000	Laptops Project: 10100.20.3 Org: 3001.5110 Account: 500-10	Dell	1,000.0000	12,000.00

KEY BENEFITS

- Integrates with Deltek Costpoint® for quicker generation of PO's and access to vendor data
- Offers greater control and insight on your organization's procurement process, while reducing wasteful expenditures
- Uses a paperless e-form via a Web browser for submittal and approval of all requisitions
- Generates notifications and reminders automatically—where reviewers/approvers receive e-mail notifications that a requisitions has been received, pending their review and processing
- A fully configurable rules engine for quick setup and easy maintenance of all approval routing rules
- Built on top of a fully functioning document management platform offering you the ability to attach any type of document
- Facilitates standardized and consistent business processing, helping to reduce time and money required to process requisitions

Solutions Designed for Your Needs

ReqConnect helps your organization reduce paper, time and cut costs in the purchasing process.

Requisition E-Form

ReqConnect utilizes a smart e-form made available within your organization through a Web browser interface over your company's Intranet site. This e-form allows users to enter all purchase requisition information that will get loaded directly into your Deltek Costpoint® system—which will then automatically create a purchase order.

E-mail Notifications

E-mail messages are generated automatically for requisitions entering a workflow queue. Users are notified via e-mail when requisitions:

- Are available for processing or have a changed status
- Have a change request from a reviewer or approver
- Are escalated to a participant's attention based on an action required

Electronic Notes

Users can attach electronic notes by entering text in a free form text box. The user-ID and date/time stamp is saved with the note. Electronic notes can be viewed by other users based on security access rights.

Electronic notes can also be attached to supporting documents during requisition workflow processing. A supporting note can be entered to assist in documenting specific actions a user takes within the process.

In requisition processing, sample notes may include:

- **Decline** – the user enters the reason for disapproval
- **Requesting Change** – the user enters a description of the change being requested
- **On Hold** – The user is awaiting information and enters the reason the item is being held

Requisition Request Escalation

If a requisition has been in a workflow queue for a defined period of time and no user action has been taken, a timer can be executed automatically sending an e-mail reminder or escalating the work item to another work queue.

Audit Trail

ReqConnect maintains a detailed history log for each document stored in the repository. Each time a document is accessed by a user, a record is entered into the history log to include log entry date and time stamp, user ID accessing the document, and user action performed. ReqConnect also provides a summary of users that have processed the requisition, as well as any changes requested by approvers.

Seamless Access

Additionally, links to the requisition document can be embedded in the content of the e-mail notification. When the e-mail recipient clicks on the link, they are taken to the document or work queue seamlessly without having to leave e-mail and launch another application.

As an *ISV Partner* since 2005, ECP offers Deltek clients a wide range of "project-based" workflow automation and document management solutions that support business processes such as: invoice automation, billing, contract management, requisitioning and human resources. These are complimented by our value-added integrations we provide between our content management system and Deltek software.



For more information on ECP, please visit us online at:
www.EPCorp.com

“We can easily access archived documents from any desktop and process new documents electronically. We no longer need to share a central paper filing system, which allows staff to work faster and more efficiently.”

Gregory Derritt
Director, Business Systems
American Institutes for Research