eRequest Q&A

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How does eRequest integrate with Continia?

eRequest allows for the entry of requisitions and on approval, Purchase Orders are created in BC. eRequest can also automatically create receipts or allows users to mark purchase order lines as received and the goods receipt in created in BC.

You may use Continua (or any other OCR software) to OCR incoming documents and create the invoice matched to the Purchase Order or Purchase Order/Goods Receipt and use Continua workflow for approvals.

eRequest also has its own Invoice Approvals functionality which you could use to route the purchase invoice back to the originating user or to a specified eRequest user for approval through eRequest in the Nolan Cloud Services portal or through the teams app for the desktop or mobile.

How does the approval workflow work in eRequest? Is it from BC or eRequest, and what workflows are recommended for not-for-profit businesses?

Approval routes and approval values are held in eRequest. A person entering a request does so whilst in a role or group.

For example, all the users in finance may be in a “Finance Request Entry” role/group. When they have entered their request, we call the “Finance Request Entry” role/group the originating group and users must submit the request to the originating group’s parent which may be the “Finance Manager” Group.

There may be more than one person in the “Finance Manager” group and the person entering the request can select any of the users in the “Finance Manager” group to send the request to.

The user in the “Finance Manager” group has an approval limit. If the request is less than the approval limit, the request may be approved and a purchase order created. If the request is for more than the finance manager user’s approval limit, the finance manager user must submit it up the hierarchy again, perhaps to the user in the “Chief Financial Officer” group.

Sometimes, the approval groups are setup on a departmental basis, sometimes, they reflect named users where Joe sends his requests to Bob etc. I have also seen generic groups where there are “Requesters” who submit to a group called “Greater Than 10,000” where the system is configured with all of the users who can approve up to 10,000. The parent of that group is a group called “Greater Than 50,000”.

Different request forms can have different originating groups so an IT request may be first sent to the IT manager for technical approval, then to the finance manager for financial approval before going to the Head of Department for final approval.

Can eRequest approval workflows be based on department code or project code in a requisition?

The requester can select an originating group which will apply the approval workflow based on the department or project.

We can also set up request forms by department or by project and default the originating group, department and/or project on the form so that all requests

entered on that form will be linked to the right department, project and be approved using the departmental or project workflow.

Is it mandatory for every requisition in eRequest to go through a workflow? For example, even if the CFO raised a small requisition for £100, it would go for approval.

There is an option at form level to not allow “Self-Approval” which will mean that even if the requester is the CFO, they will not be allowed to approve their own requests. If you wish to allow self approval up to a certain limit however you may do so by setting the option to allow “Self-Approval” and setting the approval limit for the user on the form.

Who can perform a Goods Receipt in eRequest? Does it have to be the requisitioner, and is it handled in BC or eRequest?

Goods receipt can be performed in BC or eRequest. In order for a user to do the goods receipt in eRequest, they must be granted access to do so, so this can be restricted at form/user level.

---- When the list of POs to be receipted is displayed in eRequest, the user can only see the POs created from requests that they have raised or requests that have been raised by users below them in the hierarchy. i.e. a departmental head can receive as well as the requester if this hierarchy is setup in eRequest.

There is also an “Automatic Receipt” option at form level whereby, eRequest creates the purchase order and receipt in BC at the same time which effectively enables the AP team to enter the invoice in BC without the need for manual receiving simulating the process for a 2 way match.

Does eRequest support multiple currencies and does it integrate with our currency setup?

eRequest has a currency field on the request forms which defaults from the company base currency. You can also set a different default currency on the form if required. You can lock the currency or allow it to be changed on the form by the user if required and set restrictions as to which currencies they may select.

In submitting a request, the approver must have an approval limit set in the currency of the request otherwise, eRequest will not allow the request to be submitted to them. Approvers may have approval limits set in as many currencies you need.

eRequest uses the currency setup and information from BC so you no not need to set up currencies or exchange rates in eRequest.

What are the tolerance levels for differences in eRequest?

Currently there is no additional functionality in eRequest that checks for variances between the purchase price on the PO and on the invoice. Existing functionality in BC applies. The decision as to whether the invoice requires additional approval is a manual decision by the person entering the invoice.

How does eRequest work with fixed assets?

In eRequest we allow entry of GL Account, Item and Comment lines on a request which translate to the item types on the purchase order in BC. We do not currently support the Fixed Asset line type however it is in the roadmap for future enhancements.

I am unsure if BC allows for the creation of assets from postings to the Fixed Assets Additions account. If so, requests could be setup to create purchase

orders for the Fixed Assets additions account which would then provide the basis for creating the assets.

How do I add deferral templates for an order in eRequest?

You can set a Default Deferral Template against items in BC. If you create a request for an item where a Deferral Template is attached, the resulting purchase order will be created with the deferral plan attached.

Can approvals be delegated in eRequest when someone is on annual leave?

Currently there isn’t a mechanism for delegation however, if a user sends a request for approval and it is not approved by the approver, the requestor may recall the request and sent it to another approver within the approval group.

How does budget integration work in eRequest, and what other options are available?

Application in the period. Access to Active User pricing requires the entry of a charge card into the system for automated billing.

Who needs a BC license to use eRequest?

Users do not require BC licences to use eRequest. Requests may be entered, submitted for approval, approved and PO created, purchase orders emailed to vendors, receipted and invoices may be approved in eRequest, all without a BC licence.

A BC licence is only required, should the user need to use the links from eRequest to navigate into the BC application itself.

Does eRequest pull vendor information from BC, and what happens if a vendor isn’t approved? Would it allow requisition to be raised? Could it integrate with Salesforce?

The vendor must be a vendor in BC. There is an option to exclude block vendors from being selectable. You can also filter which vendors are available for selection on a request form, for example, only allow selection of IT suppliers on the IT form.

What notifications do eRequest users receive, and how often are they sent?

The user gets notifications through Teams when a request is sent for approval, when a request is approved and when a purchase order is created.

Can I add contracts to a requisition in eRequest?

For sites where contracts are a dimension in the chart of accounts you may enter of select the contract when putting on a request.

The addition of functionality to allow the entry of the Contract, task and planning line is on the product road-map.

Does eRequest automatically send the PO number to the vendor, or do we send it manually?

Currently, the PO should be emailed to the supplier manually however Automatic PO emailing will be an option placed at form level to enable Automated Purchase

order emailing.

Can multiple people be included in first-stage approvals in eRequest, such as 5 people in Finance receive the order for review?

Only one user at a time is the approver however you can submit the request along a hierarchy until all approvers have approved.

Can approvers make changes to a requisition in eRequest and is there an option to add an amend button?

Before submission, you can change your request. Once a request is submitted, before it is approved, a user can recall the request to make amendments if needed.