

WebReq Version 5.60 release - May 2018

As with previous WebReq releases, Version 5.60 includes major new features, as well as fixes and minor enhancements.

The major features in this release have been introduced as part of our plan to constantly improve the product as a whole, rather than to address the requirements of a specific client.

This document outlines all major functional enhancements introduced since version 5.50.

Contents

Standing Orders	2
Automatic Population of Supplier Invoice Entries	3
Site Diaries	4
Fruck Run Sheets	6
Fimesheet Enhancements	7
Nobile Timesheets	
og Scheduling	7
Auto loading of Card Transactions	8
Other Enhancements	9
n Development	12

Standing Orders

WebReq now has Standing Orders which allows you to manage multiple standing and duplicate orders over different time periods. These can be across multiple suppliers and services.

The new form allows the user to list and filter existing and historic standing orders and provides the ability to create new orders based on re-occurring schedules.

Menu	Standing	Orders									
Advanced Fi	Iter Options V										
Supplier	E		R	ecurring Schedule	All	v					
Requisitio	n No		S	how Orders Due							
Due Date F Due Date T	Ę		-	how Generated oday							
Search		Clear									Generate
	Recurring	Latest	Latest	Latest		Latest	Expected		Previous	Previous	Generate
Supplier Name	Schedule	Purchase	Requisition	Requisition	Generated Date	Requisition	Recurring	Requisition Type	Requisition	Requisition	New
	Schedule	Order No	No	Date		Value	Date		No	Date	Requisition
Bunnings Australia	Quarterly	39786	13262	21/08/2017	21/08/2017	18040.00	21/11/2017	Standing Type 1	13141	21/05/2017	
Telstra Corp	Monthly	40029	13343	23/10/2017	24/10/2017	880.00	23/11/2017	TELRegs	13222	23/09/2017	
Transgrid	Monthly	39666	13222	14/10/2017	14/10/2017	2128.33	14/11/2017	Standing Type 1	13101	14/09/2017	
Oz Cleaning	Quarterly	36969	12323	04/07/2017	04/07/2017	18040.00	04/10/2017	Standing Type 3	12202	03/04/2017	
NRMA	Monthly	Pending	13411	02/11/2017	02/11/2017	148.80	02/12/2017	NRMA Standing	13290	03/10/2017	
Lease Plan	Annual	26721	8907	18/11/2016	18/11/2016	12040.00	18/11/2017	Lease Plan	8786	19/11/2015	
Fleet Track	Monthly	39357	13119	24/10/2017	24/10/2017	375.00	24/11/2017	Standing Type 1	12998	24/09/2017	

- On initial opening the new Standing Orders form lists all current orders (requisitions) that are due, shortly due or overdue.
- The Latest (current) requisitions due for recurrence will be displayed. The related PO number will also be included.
- Users are able to click on the latest requisition number to view details if required
- Where the latest requisition has not yet been PO Approved this is highlighted as "Pending"; providing the opportunity to ensure prior recurring orders have been properly completed.
- The expected Recurring Date will signify if a standing order is overdue (red), due today (green) or due shortly.
- The previous requisition number relating to each standing order is displayed and the full requisition details can be viewed by clicking on the Previous Requisition Number link.
- A user will click the checkbox under the Generate New Requisition column to select those requisitions that are to be "copied" to a new requisition.
- Initially the content of copied (recurring) requisitions will be identical to the source requisition except for the Requisition Date or Generated Date. Newly generated requisitions can then be edited if required prior to approval.



Automatic Population of Supplier Invoice Entries

WebReq can now automatically capture common invoice data values from emailed Supplier Invoices and upload this information, seamlessly populating the WebReq Supplier Invoice screen. This reduces manual data entry and speeds up processing. Once loaded the Supplier Invoice is ready to be processed within WebReq, including email based smart phone approval. This is all done in WebReq eliminating the need for interfaces to OCR systems.

The process includes data capture, validation and upload automation; all designed to limit the amount of user intervention and excessive manual processing. This provides increased visibility for your AP staff, reduces the cost per invoice by avoiding human mistakes and provides full control over the approval cycle by routing the invoices to the right approvers automatically.

Based on inbound Supplier Invoices being sent to a specific email address WebReq takes a pdf invoice, scans and "reads" it and turns it into metadata that is used to populate fields in the database.

As part of the process you define where on a Supplier Invoice WebReq is to pick up the different fields so that you create the templates pointing WebReq at the characters it is to use. The mapping is done by you, once per supplier, so there is minimal consulting cost in the set up or ongoing support.

Fields available to be mapped include the Invoice Number, Invoice Date, Invoice Total and Purchase Order Number. If the Purchase Order number is selected WebReq will automatically allocate all the lines on the Purchase Order to the Invoice Entry screen allowing the user to confirm or make changes as necessary, thus eliminating the need for many more key strokes. The Supplier Invoice document is also automatically attached to the invoice in WebReq providing a full link back to the relevant document.

Waterman Pty Ltd 1 Crosby St Liverpool NSW 2170			Ę		225 70 084441	123
WebReq Pty Ltd 23 Some Street Clovelly NSW 2031					Date Order N	10/95/2015
Description		Qty	Rate	Amount	GST	Template Field
B19411BE	Bic Cristal Med Blue	1.00	\$ 18.75	\$ 18.75	\$1.8	PO Number Invoice No Invoice Date Invoice Total
EDOFF010R	A4 Recycled Copy	10.00	\$ 11.40	\$ 1 14.00	\$ 11.40	
OW173SE	A4 130gsm Colour Yellow Out of Stock ON BACK ORDER	1.00	\$ 54.00	ē.	•	Remove text:
					mount Ner GS oice Total	Remove Dollar sign(s) Comma(s) Space(s)
						OK Cancel Remove

When a Supplier Invoice has been entered it will need to be Approved for Payment. In WebReq you can have emails sent automatically to the person who needs to approve the Invoice for Payment. They will receive an approval notification email, such as the one below, and will be able to review the invoice as an attachment, and then Approve or Reject it accordingly. This is ideal for managers on the road using their mobile phones.



: WebReqAW <alistairw@gtmanagement.com.au alistairw@gtmanagement.com.au</alistairw@gtmanagement.com.au 					Tue 08/05/2018 8
ect: Cleaners Warehouse Invoice 56985 submitte	d for approval				
ebReq - Approval Notification					
ebkeq - Approval Notification					
voice Number: 56985 is submitted for a	approval Click on the invoice number to access WebReq.				
tered By: Geoff Taylor					
voice Date: 09/07/2012					
lue : \$\$2178.00					
Number(s): 100051, 100124					
ject Description	Activity Description	Description	Unit Cost	Quantity	Val
George St - Budget Example	Requisites	Meterials	\$2000.00	1.00	\$2000.
George St - Budget Example	Consumables	Consumables	\$77.00	1.00	\$77.
George St - Budget Example George St - Budget Example	Consumables Materials	Consumables	\$77.00 \$12.00	1.00 2.00	\$77. \$24.
George St - Budget Example	Materials		\$12.00		
				Total	\$2178.
				Total GST	\$202.
				Total inc GST	\$2380.4
PROVE					
PROVE					
PPROVE					
REJECT	sons for rejection in the email body. Th	here will be visible to the origin	nator		
PPROVE REJECT	isons for rejection in the email body. Th	hese will be visible to the origi	nator		

Site Diaries

WebReq was recently enhanced with the ability to keep Site Diaries both online and offline.

Each day has a cover page and tabs for each cost type.

	2444 WYONGAH, F Saturday 1/7/2017	ROAD AND DRAINAGE U	PGRADE		Save and Continue	Delete
				Complete		
ctivity Notes				Attachments		
Any variations noted in	day	Yes 🔘 No 💿	Comments			
Start Time		6:30				
Ind Time		17:00				
Pre-Shift ?		Yes 🔘 No 🖲				
Did a tool box talk hap	pen ?	Yes 🔘 No 🖲				
Did the client visit the s	site?	Yes 🔘 No 🖲	Comments			
Was there a delay?		Yes 🔘 No 💌	Comments			
Delay Duration						
Note 1 Weather				A		
				11		
Rainfall		MM				
Cover Page	Labour	Plant	Material	Subcontractors	Summary	



Some example cost sheets are below:

		VYONGAH, ROA 1/7/2017	D AND DRAI	NAGE UPGRADE					Save an <mark>d</mark> Conti	nue	Dele	te	
lanad	ement					Com	plete hments						
ianag	Person	Start Time	End Time	Cost Code	Rate C	ode	Quantity	Unit	Rate	Amount	Allowance	Repeat	ſ
X +	Paul Couzens 🔻	6:30	17:00	CONC	Labour	r v	5	Hours	700.00	3500		Repeat	
<+	Damien Delaney	6:30	17:00	AS	Labour	•	6.75	Hours	120.00	810		Repeat	
(+	6			DEMO	Labour	r 🔻	3.25	Hours	120.00	390		Repeat	1
(+	Paul Couzens	6:30	17:00	CONC	Labour	r 🔻	5	Hours	700.00	3500		Repeat	1
(+	Gavin Musgrove	6:30	17:00	V001	Labour	e 🔻	5	Hours	105.00	525		Repeat	1
			1								1000		1
<+	2			CONC	Labour	•	5	Hours	105.00	525		Repeat	
Κ+	n Labour			CONC	 Opension 	*	5	Hours Hours	105.00	525		Repeat Repeat	
K +	n Labour Person	Start Time	End Time	Cost Code	 Opension 	•		100000	105.00		Allowance	Repeat	
K +	n Labour Person Brody Deaves	6:30	17:00	Cost Code	Rate C Mainte	▼ Rode	Quantity	Hours	Rate 49.48	Amount 549.80	Allowance	Repeat Repeat Repeat	
K + tobsor K + K +	n Labour Person Brody Deaves T Nathan Cambourn T	6:30	17:00	Cost Code AS DEMO	Rate C Mainte Mainte	▼ code enance Worksh ▼ enance Worksh ▼	Quantity 10 10	Hours Unit Hours Hours	Rate 49.48 52.53	Amount 549.80 580.30	Allowance	Repeat Repeat Repeat Repeat	
K + obsor K + K + K +	n Labour Person Brody Deaves Y Nathan Cambourn Y Barbara Brown Y	6:30	17:00	Cost Code AS DEMO CONC	Rate C Mainte Mainte	▼ code mance Worksh ▼ mance Worksh ▼	Quantity 10 10	Hours Unit Hours Hours Hours	Rate 49.48	Amount 549.80 580.30	Allowance	Repeat Repeat Repeat Repeat Repeat	
K + obsor K + K + K +	n Labour Person Brody Deaves T Nathan Cambourn T	6:30	17:00	Cost Code AS DEMO CONC	Rate C Mainte Mainte	▼ code enance Worksh ▼ enance Worksh ▼	Quantity 10 10	Hours Unit Hours Hours	Rate 49.48 52.53	Amount 549.80 580.30	Allowance	Repeat Repeat Repeat Repeat	
x + X + X + X +	n Labour Person Brody Deaves Y Nathan Cambourn Y Barbara Brown Y	6:30	17:00	Cost Code AS DEMO CONC	Rate C Mainte Mainte	▼ code mance Worksh ▼ mance Worksh ▼	Quantity 10 10	Hours Unit Hours Hours Hours	Rate 49.48 52.53	Amount 549.80 580.30	Allowance	Repeat Repeat Repeat Repeat Repeat	
X + tobsor X + X + X + X +	Person Brody Deaves Nathan Cambourn Barbara Brown	6:30	17:00	Cost Code AS DEMO CONC	Rate C Mainte Mainte Mainte	▼ code mance Worksh ▼ mance Worksh ▼	Quantity 10 10	Hours Unit Hours Hours Hours Hours	Rate 49.48 52.53	Amount 549.80 580.30	Allowance	Repeat Repeat Repeat Repeat Repeat	Repeat
K + K + K + K + K +	n Labour Person Brody Deaves ¥ Nathan Cambourn ¥ Barbara Brown ¥ T	6:30 6:30	17:00	Cost Code AS DEMO CONC	Rate C Mainte Mainte Mainte	vode mance Worksh V mance Worksh V mance Worksh V V	Quantity 10 10 10	Hours Unit Hours Hours Hours Hours	Rate 49.48 52.53 58.02	Amount 549.80 580.30 580.30 Rate	Allowance	Repeat Repeat Repeat Repeat Repeat	Repeat

Job	2444 WYONGAH	H, ROAD AND DRAINAGE UI	PGRADE		Save and Continue	Delete
Date	Saturday 1/7/2013	7			Export To Excel	Excel Overview
ctivity No	tes			Attachments	D	
Any variations no	ted in day	Yes 📄 No 🖲	Comments			
Start Time		6:30				
End Time		17:00				
Pre-Shift ?		Yes 🔘 No 🖲				
Did a tool box tal		Yes 🔘 No 🖲				
Did the client visi		Yes 🤍 No 🖲	Comments			
Was there a dela	y?	Yes 🔘 No 🖲	Comments			
Delay Duration						
Weather						
Rainfall		ММ		<i></i>		
Cost Code						Valu
CONC AS V004 DEMO V003 V001						20255.3 1819.6 970.3 60.5 52 16
SIGN						23798.9



Key features include:

- Site staff can enter what actually happened as it happens.
- It provides feedback of actual costs for each entry so that managers have accurate costing.
- Screens have been built to run on a mobile device (e.g. Tablet, iPad) or desktop providing high compatibility and ease of use wherever staff operate.
- You can document attachments, including automatic attachment of photos taken from the device. Photos are transferred to the server when the device is next online.
- Colour-coded data entry that follows logic steps. Coloured tabs show at a glance what has and hasn't yet been entered.
- Ability to copy a previous diary entry so there is no need to re-enter the same information when the same type of work is carried out over several days on the same site.
- Option to complete more than one Diary per day for occasions when there is more than one Manager on the same site, on the same day.
- Timely availability of costing data to everyone (including staff in the field).

Truck Run Sheets

As an extension of Site Diaries, we have developed Truck Run Sheets to keep track of haulage by trucks to various sites carrying different materials. The following costing definitions can be setup:

- Tip Fees (e.g. Bricks to Tip 1 may cost \$110 per Tonne, while Asphalt to Tip 1 may cost \$200 per Tonne).
- Haulage Charges per Schedule (e.g. a 10 wheeler to Tip 1 may have a Cost Rate of \$100, and to Tip 2 a Cost Rate of \$120).
- A Register of truck ownership.
- Truck Capacities (e.g. a 10 wheeler may be able to carry up to 10 Tonnes).

Each Load entered on the Truck Run Sheet generates 2 transactions:

- A haulage cost based on the truck being used and which tip site it is going to, and
- A dumping cost which is based on the truck type, tip site and material being carried.

			9 6-14 Urunga Para sday 10/5/2018	ade					Save and	Continue		Delete				
2		THU.	July 10/5/2010				Complete	d 🔲								
	Truck Rego		Truck Type		Tip Site		Material		Work Centre		Loads					
	Truck Rego abc123	•	Truck Type	Ŧ	Tip Site City Tip		Material Asbestos Soil		Work Centre	•	Loads 7:00	8:00	8:45			
						•		۲	-	7		8:00	8:45	15:15		
	abc123	۲	10 Wheeler	۲	City Tip	•	Asbestos Soil	•	DEMOLITION		7:00		_	15:15]	



Timesheet Enhancements

Timesheets have been enhanced to provide more flexibility for users. The key changes are as follows:

- In the past Timesheets were Approved by the manager responsible for the person who entered the Timesheet into WebReq. A new feature now allows Timesheets to be Approved by the Project Manager rather than the manager of the person who entered it. This streamlines Timesheet approvals where the work is against billable projects.
- Some businesses do not require their staff to enter a Start/End Time for each Timesheet entry. Now users can switch this feature off and simply enter the number of hours worked for each Timesheet entry. This makes it simpler and quicker to enter Timesheets into WebReq.
- You are now able to attach supporting documentation to the Timesheet.

Mobile Timesheets

 Another major enhancement in Timesheets is the ability to run the module on a mobile device such as a tablet or phone. The screens have been modified to suit users who are out of the office and want to enter their Timesheet on a mobile device. When a user goes to the web site on the phone it will default to the current week. You are able to create a new weekly Timesheet or update daily entries on the current week. Once all entries have been made and the user selects Finished / Update the Timesheet is locked and is available for EBA interpretation and updating within WebReq.

Log Scheduling

WebReq has recently introduced Scheduling into its offering when used with Logs. It allows you to schedule the work to be done for a particular job and to send this out to all sub-contractors with their Work Orders.

The Scheduling screen is opened from the WebReq Log so it is only information on that log that can be entered. The user can select the relevant days beside each sub-contractors entry. Drag and drop features allow you to easily extend or contract the entries as appropriate.

og Supplie	r Schedi	ule									
Start Date			25/0	07/2017						Updat	te
	Tue 25/07/17	Wei 26/07		Thu 27/07/17	Fri 28/07/17	Sat 29/07/17	Sun 30/07/17	Mon 31/07/17	Tue 01/08/17	Wed 02/08/17	Thu 03/08/17
JB Electrical's											
Pete Conra	ad - 81828	38485	S								
SouthEnd Plumbing											
Neil Armst	rong - 999	9									
International Kitchens											



Once the Schedule has been completed a new report allows for 28 days of scheduling to be displayed. This report is automatically dispatched to each log sub-contractor along with their Work Order. In that way the sub-contractor knows the expectation on them and the dependencies on others and that others have on them.

Schedule for Job	9599	6			1	/117-12	23 Cha	pel Rd	South	BANK	STOW	N NSW																
Commencing on	Tues	day 25	/07/20	17																								
Key	Sch	eduled	Day		Unsch	neduleo	I Day		Nonw	orking	Day																	
Supplier		Tue 25/07	Wed 26/07	Thu 27/07	Fri 28/07	Sat 29/07	Sun 30/07	Mon 31/07	Tue 01/08	Wed 02/08	Thu 03/08	Fri 04/08	Sat 05/08	Sun 06/08	Mon 07/08	Tue 08/08	Wed 09/08	Thu 10/08	Fri 11/08	Sat 12/08	Sun 13/08	Mon 14/08	Tue 15/08	Wed 16/08	Thu 17/08	Fri 18/08	Sat 19/08	Su 20/
JB Electrical's Pete Conrad - 8182838485																												
SouthEnd Plumbing Neil Armstrong - 999																												
International Kitchens Buzz Aldrin - 0412123456																												

Auto loading of Card Transactions

You are now able to automatically load card transactions from a banks website directly in to WebReq. We currently support 2 formats being as follows:

- CSV format from CommBank
- QuickBooks format from AMEX

Please contact us if you have a requirement for a different format and we will endeavour to create this if it is feasible.

Exe Lead From Bark Lead From Bik CommonwealthBark	
Log on to CommBiz	
Login ID: * 2 Expatien Pastword CommBiz - Terms & Contrilions Login Password: * 3 CommBiz - Terms & Contrilions 3 CommBiz - Minkets Product Disclosure Statement Token Passwort: 9 CommBiz Centre	
Where you big on to ConnerBic: you agree to our <u>Tama and Conditions</u> Register contine now Register contine no	
Our new cyber security advice page helps you secure your business, with top tips on securing your compares and networks and helping your staff protect themselves and your business while they're online. <u>Visit</u>	
💡 Current highlights	
Want to go papertees? Service delegates can electorically authorise requests like adding peory. CEA accounts afting up Commercial Card Administration and adding or charging Electronic Account Authorities. Push Notifications now available on CommBiz Mobile You can customise notifications now available on CommBiz Mobile to learn that are importante you. Find out more about CommBiz Mobile	
Security © Commonwealth Bent, of Australia ABN 45 123 124	



In addition to the above we have enhanced the Card Allocation module further with the following features:

- Allow the Card Approver to emulate the Card Holder for data entry if required. From the Approvals screen they can allocate to Purpose, Activity and Work Centre codes as well as flag an entry as Complete.
- Once a file containing Card Transactions has been loaded an email notification can be sent to the Card Holder alerting them to the fact that it has been loaded and is ready for them to enter the details.
- Once a Card Holder has entered the relevant data and flagged it as Complete an email notification can be sent to the Card Approver alerting them that they need to Approve a card.

Other Enhancements

- Further **WebReq menu options**, typically used in the setup of the system, are now available using a web browser interface rather than the Windows based Control Panel. This is part of our ongoing development to move functionality from the Control Panel to the web browser. Options now available on the web include Activity, Activity Group, Profit Centre, Profit Centre Group, Purpose Code and Period End maintenance.
- Mobile Inwards Goods. As part of the ongoing development of functions that make sense to have available on mobile devices, WebReq now allows users to access Inwards Goods on their tablets or smartphones. This allows users in warehouses to mark off goods delivered directly into WebReq without the need to be in front of a computer.
- **Xero API**. We have developed an interface to Xero using their API. This allows Suppliers and associated invoice transactions to flow from WebReq in to Xero.
- Un-Complete a Completed Requisition. Previously once a Requisitioner had flagged their Requisition as Completed they were unable to make any changes to this unless one of the Approvers rejected the Requisition. A new feature now allows the Requisitioner to "Un-Complete" their Requisition (if provided with appropriate rights) to enable them to make further changes to it, unless the Requisition has already been Approved by the next Approver.
- **Reset Approvers of Requisitions**. If you have appropriate permission the system will allow you to reset approvers per Requisition. This is useful when an Approver has changed roles or left the company. For example, a new manager of a project may need to approve a requisition that is waiting on the old manager to approve.
- **Budget Import**. Users of budgets in WebReq can now import their budgets using the web browser rather than the Control Panel. A Budget Import screen determines what fields need to be included in the CSV file (Excel) to be uploaded in to WebReq. Each budget must include the Purpose Code and Activity Code to allow WebReq to determine the relevant approval rules.
- Email Management now allows users to have more flexibility in regard to managing email alerts within WebReq. The form allows clients to include/exclude the options of the various email alerts. Each alert can also have any number of "additional" recipients. The below are just some examples of alert options (for requisitions) that clients have requested over time.



My Menu	Email Ma				
Select Module		[m			
		Requisition			
Select Notifica	oon type	Requisition Completed	×		
Alert Detail	s.				
Email Subject		Requisition No [Requis	sition No] by [Requisitioner]	is awaiting approval by	Approve
Additional Sub	ject Text	Some more text			
Inactive		Ö			
Advise Approv	er if over budget				
Include all atta	achments				
Notify Purpose	Manager				
Notify Profit C	entre Manager				
Notify Location	n Manager				
			Recipient Type	FYI Prefix	Delete
			Recipient Type	FY1 Prefix	Delete
Recipient Waters, Alista	ir V	anagement	<u>cc</u> ~	FYI Prefix	
Recipient Waters, Alista Wy Menu	⊭ ✓ ✓ Email Ma		<u>cc</u> ~	FYI Prefix	
Recipient Waters, Alista	⊭ ✓ ✓ Email Ma	Requisition		FYI Prefix	
Recipient Waters, Alista My Menu Select Module Select Notifica	Email Ma			FYI Prefix	
Recipient Waters, Alista My Menu Select Module	Email Ma	Requisition		FYI Prefix	
Recipient Waters, Alista My Menu Select Module Select Notifica	Email Ma	Requisition Requisition PO Approved			X
Recipient Waters, Alista My Menu Select Module Select Notifica Alert Detail	Email Ma	Requisition Requisition PO Approved			X
Recipient Waters, Alista Wy Menu Select Module Select Notifica Alert Detail Email Subject	Email Ma	Requisition Requisition PO Approved			X
Recipient Waters, Alista My Menu Select Module Select Notifica Alert Detail Email Subject Additional Sub Inactive	Email Ma Email Ma tion Type s	Requisition Requisition PO Approved			X
Recipient Waters, Alista Wy Menu Select Module Select Notifica Alert Detail Email Subject Additional Sub Inactive Exclude alert I when they PO	Email Ma Email Ma tion Type	Requisition Requisition PO Approved Requisition No [Requise			X
Recipient Waters, Alista Wy Menu Select Module Select Notifica Alert Detail Email Subject Additional Sub Inactive Exclude alert 1	Email Ma Email Ma tion Type	Requisition Requisition PO Approved Requisition No [Requise			X

- Expense Claim Approval by Project Manager. Just as with Timesheets (see above) you can now set Expense Claims to be approved by project managers rather than by the manager responsible for the person who entered the expense claim into WebReq
- **Retentions**. You can now apply retention rates to both suppliers and clients in WebReq. When producing RCTI or sending invoices to clients the appropriate retention rate can be applied.



- **Document Management**. In the past users could store documents attached to Facility Management logs. The List Document screen now allows users to go to a central location to view all documents stored within WebReq. For example, Supplier Invoices that have been stored against invoices entered in WebReq.
- Person Templates. Administrative users of WebReq are aware of the number of Security Group fields that are attached to users which determine what a user can do within WebReq. In the past it was necessary to set up each user separately. Some sites have large numbers of users and many of these perform that same, or very similar roles. Person Templates enables you to create as many template users as you require to help speed up the creation of new users. For example, you may have a template user for a Job Manager, another for a Warehouse user, another for an Admin user and another for an Accounts user.



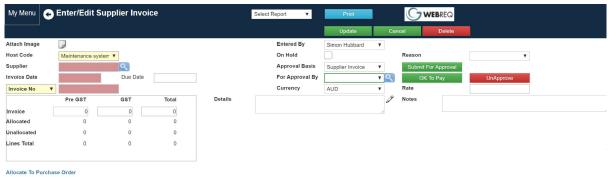
In Development

• UI

WebReq is undergoing a major rewrite to modernise the Look and Feel of the product. This is expected to be released later this year, and work has already started on the following modules: Supplier Invoicing, Inwards Goods and Requisitions.

As an example, here are a couple of screen shots from the Supplier Invoice module. The final design may vary slightly but as can be seen it gives WebReq a 'fresher' and 'more up-to-date' look.

My Menu	Li	st Supplier I	nvoices					Select Re	port 🔻	Prin New Inv		C	7 WEBREQ					
 Advanced F 	=ilter Opti	ons																
upplier AP Acc lurpose Code from Invoice Da from Year/Peric from Invoice No lost Code	ate od 1	900 1 Te	o Invoice Date o Year/Period o Invoice No ▼	01/	Q Q 01/2099 12	Requisition PO Numb Currency Invoices Credits	per		▼ 2	Open Image: Comparison of the second of th	v	d	Batch I Include Open Closed Exporte Batc	Batch	20	lude Unbato	triod 5	
Search		Clear			Display		First 100 Re	sults 🔻					Appro	we Selected				
Invoice No	Туре	Supplier	Invoice Date	Status	Currency		Approved Inc GST		FC Approved Inc GST	Last Approver	For Approval By	Image	Approve All	Action Require	d Batch	Batch All	Copy Invoice	
1234567	Invoice	Statewide Steel	16/05/2017	Open	AUD	0.00	0.00	0.00	0.00		Simon Hubbard						•	
56554	Invoice	British Aerospace	12/12/2017	Open	AUD	13,200.00	0.00	13,200.00	0.00	Simon Hubbard							-	
TT2017002	Invoice	Texel Ltd	2/07/2017	Open	AUD	33.00	0.00	33.00	0.00		Simon Hubbard						-	



Allocated Supplier Invoice Lines

Unallocated Supplier Invoice Lines



• Offline Photo Capture on mobile devices

A new development is in progress to create a Mobile Phone App for taking or selecting existing photos and sending to WebReq for association with claims, card allocations, invoices, etc. This can be used offline and allows the user to Transfer Files to the WebReq server when they are next online.

A user can select New Document to select a photo, or take a new one, give it a description and specify what type of document it is for (e.g. an Expense Claim or Invoice).

≡	New Document
Get Photo	
Description	
Document Type	•
Save	

Under List Documents the user can either Delete or Transfer files to the WebReq server for use with the relevant WebReq module.

ansfer Files Delete Marked	
Insier Files Delete Marked	
Created Transferred Type Description	n
11/5/2018 N/A Expense Claim TC	



• Mobile Requisitions

The following details the proposed enhancement to WebReq to allow for fast requisition entry on mobile devices. WebReq already supports tablet devices. This enhancement will allow for simplified data entry to occur on smaller phone-sized screen.

Features

- Purpose Code entry will include a pop-up search function to allow for adding criteria such as manager, location, profit centre, etc.
- Supplier will contain a "quickpick" function where users enter the first few characters contained in the supplier name or AP Account and a list of those results will auto-display for selection.
- Items will allow for quick-pick based on the item code and item description.
- Activity Code will also use the quick-pick function based on the activity code or activity description.
- The Description field will autopopulate to the Item or Activity description but can be edited by the user.
- Selection of an item code can auto-populate the rate field where items have been configured with a cost rate.
- All the above fields are mandatory prior to submitting for approval.
- Submitting the requisition will auto-complete the requisition and begin the approval process per standard WebReq.
- The display will allow for both portrait and landscape viewing & data entry with autoreformatting depending on the orientation used.

Ne	W		Cano	el.
Upd	ate		Delet	e
Supplier	Acm	Description	Qty	Rate
20mm-b		20mm Bearing	4	20
144-00		Angle Blade	1	125
	REP-LAB	Repairs Labour	8	100
			Total	100

