Frequently Asked Questions

GENERAL

• What is Rowdy Exchange?
  o An e-procurement system offering a “one-stop shop” for many purchasing and business contract processes, including sourcing (bids), shopping, contracts, etc. It was designed to simplify day-to-day purchasing of all goods and services.

• Why did we adopt Rowdy Exchange?
  o Rowdy Exchange provides current technology for the procurement of goods and services so UTSA departments can speed processes and reduce costs. It provides improved reporting and encourages spending with preferred vendors and contracts, offering cost and time savings as well as better products for the university.

• What is the value of shopping in Rowdy Exchange vs. going out to physically shop?
  o Rowdy Exchange orders will be encumbered, have appropriate approvals and receive contracted pricing for enabled vendors. By shopping at their desks, employees’ time is maximized to perform other departmental duties.

• Who should receive training to understand how Rowdy Exchange works?
  o Everyone involved in the purchasing process at UTSA, including shoppers, requestors and approvers.

• There is an overview and requestor training. Do I need to attend both?
  o The overview is recommended for shoppers and approvers. The requestor training is required for requestors. Requestors are also required to take AM0580 Purchasing Rules and Regulations.

• How do I log in to Rowdy Exchange?
  o There is a link to access Rowdy Exchange within UTShare/PeopleSoft for people who have been requestors in the past. Once logged into PeopleSoft you will see the Rowdy Exchange link under the UTSA Business Solutions Center pagelet.
  o New employees need to fill out the UTShare Departmental User Access form and attend the required training “AM 580 – Purchasing Rules and Regulations” before taking the appropriate Rowdy Exchange class.

• What are Hosted and Punch-out Catalogs? What are Non-Catalog orders?
  o Hosted Catalog – Product content (description, manufacturer part number, etc.) and UTSA pricing are maintained within Rowdy Exchange.
  o Punch-out catalog – The process that allows a purchaser to buy from the supplier website through Rowdy Exchange. These are the showcase links/icons that will take you directly to the supplier’s external UTSA specific website.
  o Punch-out catalog (Level 2) – “Order from Supplier” link takes you directly to the supplier’s website to view the specific item and UTSA contracted price.
  o Non-Catalog order – The process of placing an order with a supplier when the goods and services are not available in either the Hosted or Punch-out catalog.

• Should I update my profile?
  o Yes. This will minimize data entry on the following:
    ▪ User defaults (delivery location, contract, account/speedchart, etc.)
    ▪ Email approval code
    ▪ Refer to Rowdy Exchange Approvers Guide if needed
  o You may view and update your profile within Rowdy Exchange from the banner at the top right side of the screen.
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APPROVALS

- Who can approve requisitions?
  - Rowdy Exchange does not specify whether or not you are an approver. If you are already approving requisitions in PeopleSoft, the same security will be migrated over, and you will receive the approval emails.

- How does an approver return/reject a requisition?
  - Approvers will have the option to return the requisition to the requestor for modification or to reject the requisition, which means that the requisition will no longer be accessible.
  - *Returning the requisitions allows for modification.*
  - *Rejecting the requisition will no longer be available for modification and the requester will have to start a new requisition.*

- Will approvers receive an email to approve a requisition?
  - Yes. Approvers will receive a detailed email from Rowdy Exchange about the purchase, and they will be able to “Take an Action” from that email.
  - Approvers who have created an approval code will be able to approve the requisition from the email. Without an approval code they are required to log in to Rowdy Exchange to complete the approval process. See the Rowdy Exchange Approvers Guide for more information about the approval code.

- Am I able to approve requisitions without an approval code?
  - Yes, you can still approve requisitions, but when the approval code is set up through your user profile, you can approve directly from the email.

SHOPPERS

- Is everyone a shopper?
  - Yes. Employees who have access to PeopleSoft are able to shop. Shoppers can only shop and are required to “assign” their cart to the department requester for processing. Departmental shoppers are controlled at the department level.

- I have students who work in a lab. Can we categorize them as “shoppers”? 
  - Employees who have assignments in PeopleSoft will be able to shop.

REQUISITIONERS

- Will the vendor receive the PO information directly?
  - If it is a catalog order, yes.
  - If it is a non-catalog order, then no. The manual process still remains the same. You will print out the PO and either fax or email it to the vendor.

- How will I know if the PO has been dispatched?
  - The PO status can be referenced within the PO itself by checking the “Document Status” and looking at the “Distribution” information. Additional information is available by expanding the view link in the document status area to show a complete document history.

- I noticed that General Stores is in the showcase catalog listing. Will I still have to send them an email or fax to get my supplies?
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- No. This PO will go directly to General Stores. You will receive your items and see the charge in your budget overview the next month.
- What is the process if I make a mistake on a requisition?
  - You can edit and/or delete the requisition as long as it has not been approved and sourced to a PO.
- How does the POC (Purchase Order Correction) work in Rowdy Exchange?
  - The POC form is housed within Rowdy Exchange. You will fill out the form electronically and, when submitted, it will go through the typical workflow and, when all approved, will route to the Purchasing Office.
- Can I see the workflow process?
  - Yes. The complete workflow can be viewed by clicking the “PR Approvals” link in the requisition. Additional workflow can be seen on the PO in the “PO Approvals” link if the PO contains capital or controlled items.
- How do I create a Receiving Report, and can I receive for another in the department?
  - Learn how to receive in Rowdy Exchange by watching the training video available when you log in to PeopleSoft under the UTSA Business Solutions Center site or on the Rowdy Exchange website under “Resources.” Yes, others in the department can receive.
- Can I work on/update a requisition if someone else created it?
  - No. Modifications can only be done by the requester who created the requisition. Other requestors can only receive the items.
- Where can I find the HUB vendors?
  - After clicking on the “Non-Catalog” link, you can leave the search criteria blank and all HUB vendors will be listed alphabetically on the first few pages.
- What if a vendor I want to use is not a showcase vendor?
  - Orders can be placed with non-showcase vendors by processing a non-catalog item request.
  - How were Showcase vendors selected?
    - Showcase vendors were selected because they have an existing contract, have a high volume of business with UTSA, and have punch-out or hosted catalog capabilities with Jaggaer. UTSA does have the option to add additional vendors to the showcase; however, this comes at an added expense and, thus, will be considered on a limited basis.
- Is there a receiving query by department?
  - Yes. Departments may search for receipts by PO number, requisition number or by receipt number.

BUDGET/ACCOUNTING

- Where do I enter my chartfield string?
  - “Defaults” can be set up in “User Settings” to make chartfield selection easier. However, chartfield strings are populated in the “Accounting Codes” section of the requisition. Only the “Speedchart” needs to be populated, which will populate the Fund, Department, Cost Center, Function or other chartfield information needed.
- What does PR Validation check?
  - PR validation will check to make sure funds are available and that the chartfield information is correct.
- Can I use a different chartfield string or split the cost?
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- Yes. Within the chartfield line, there is a link called “Add split.” This will add another line so you can use a different source of funding.

- Will I enter the chartfield string or will it already default from my profile?
  - Chartfield information can be entered ahead of time in your default settings before creating a requisition to simplify the selection of chartfield information or enter it when creating the requisition. Users should be cautious in setting up defaults as the system could default to an incorrect chartfield that was not intended for the purchase.

- When are the funds pre-encumbered?
  - There will be no “pre-encumbrances” for Rowdy Exchange orders. Funds will be encumbered when the requisition is assigned a PO in Rowdy Exchange and recorded in PeopleSoft.

- As we get closer to year-end (end of fiscal year), can I create a PO for a purchase that will use funds in the new fiscal year?
  - Yes. There is a “Next Fiscal Year” flag that you can check, and the funds will not be encumbered until the next fiscal year.
  - Note, POs identified for next fiscal year will not be finalized until September 1 of the new fiscal year and should not be placed with the vendor until September 1.

- Can I enter chartfield information at the line level if I did not enter it ahead of time?
  - Yes.

- Are vendors set up for tax exempt status?
  - Maintenance of the vendor file has not changed. PeopleSoft is the system of record. Vendors are not set up for exempt status. All vendors and transactions are reviewed at calendar year-end for 1099 tax reporting issues.

**PROCESS**

- Is shipping included in the price?
  - For catalog items, shipping is included. For non-catalog items, shipping is not included.

- Will the vendors submit invoices directly to DTS?
  - Yes, but only for Showcase Vendors or specific vendors that have been configured for e-invoicing functionality.

- Can we use Procards to order from the 17 Showcase Vendors?
  - ProCards are not allowed in RowdyExchange. Even though you are strongly encouraged to use Rowdy Exchange instead of Procard transactions, vendors who accept ProCards offer an alternative purchasing method. Procard transactions are not enabled in Rowdy Exchange, so any Procard transaction will use the same processes we use today.

- When do I need to create a receipt?
  - When orders are more than $4,999.99 (excluding Amount Only)
  - When using state or federal funds
  - When purchasing capital or controlled assets

- A vendor I previously used is listed in PeopleSoft but not in Rowdy Exchange. What is the process to add the vendor?
  - Send an email to DTS so the vendor can be migrated over to Rowdy Exchange.
  - New vendors will require the SIF form.

- What action is required after the PO is created?
  - No action is required for catalog orders.
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- For non-catalog orders, the requestor will need to print and fax or email a copy of the PO.
- Will we still enter requisitions in UTShare/PeopleSoft?
  - No. Beginning July 17, requisitions are now entered only in Rowdy Exchange.
- How does the SmartBuy process work in Rowdy Exchange?
  - SmartBuy orders work the same as they had in PeopleSoft. A non-catalog order will be used to create a requisition, and Purchasing will complete the SmartBuy PO in the state’s system.
- When will my order be shipped? Could it be a few hours or days?
  - Actual order shipment depends on the supplier. Orders are typically sent to the vendor immediately upon completion and approval of the PO. Once the order is received, processing times will vary by vendor. Please contact the vendor directly. Who do I contact if I have an issue with a catalog order?
  - Report the issues by opening a SPOC ticket
- Who do I contact if I have an issue with a non-catalog order?
  - Contact the supplier directly or submit a “Supplier/Vendor Dispute” form to DTS.
- When my PO was created on a non-catalog order I realized that my vendor had the wrong address. What do I need to do?
  - The Purchase Order can still be submitted to the vendor because you are manually sending them the PO either by fax or email. It is recommended that you submit the SIF form so that you have the option to choose which address you want to show up on the PO in the future.
- What is the difference between an internal and external comment, and how do I know when to use each?
  - An internal comment does not get printed on the PO. It is used for communication within departments or with individuals within UTSA. An external comment is printed on the PO and is to advise the vendor of additional information not contained at the line level.
- Can comments be deleted?
  - No, comments cannot be deleted. Comments are used for communicating with UTSA users only. All supplier/vendor comments must go in the External Notes and Attachments section.
- Will I get notification from the e-invoice catalog vendor?
  - Punch-out Catalog vendors will provide an order confirmation to the end user once the order is received and begins processing.