Rowdy Exchange Training Overview

Spring/Summer 2017
Course Objectives

• Know how to transition from UTShare to Rowdy Exchange
• Understand the purchase process in Rowdy Exchange, including:
  • New processes and terminology
  • Shopping and requisition overview
  • Purchasing forms and instructional guides/material
• How to enter requisitions in Rowdy Exchange, including:
  • How to locate your supplier and/or catalog
  • How to build your shopping cart
Objectives continued…

• How to enter Requisitions in Rowdy Exchange, including:
  • How to submit your shopping cart
  • How to approve your requisition
  • How to track your order
  • How to enter a receipt

• Who to contact for questions and information
Transition to Rowdy Exchange
Transition to Rowdy Exchange

• UTShare Requisitions not sourced to a Purchase Order by the go-live date of July 17 should be canceled and entered into Rowdy Exchange

• Purchase orders entered and dispatched in UTShare will be processed in UTShare
  • PO Changes (POC)
  • Receipts
  • Invoices
Transition continued…

• Requesters will need to **enter the Account Codes**; they will no longer default from entering the commodity codes

• Department staff will be able to **enter receipts** for their *department’s* orders

• Only Capital or Controlled Accounts will reviewed through the **Asset Business Process**.
Business Process Changes
Business Process Changes

• Suppliers will only be in Rowdy Exchange if identified for Open for Ordering in UTShare. Vendors with activity in the last 18-months were loaded to Rowdy Exchange.

• Entering a receipt is only required for orders more than $4,999.99 (excluding Amount Only) or all items funded with State or Federal Funds or for Capital and Controlled assets.

• Security access for Rowdy Exchange will be performed through UTShare; this includes Total Contract Management (TCM).
Summary

Unchanged
1. Maintain Orders/Invoices in UTShare if created prior to Rowdy Exchange Go-Live
2. Vendor Maintenance and Invoice Processing by DTS

New Process
1. Account Code Entry
2. e-Invoice for Catalog orders
3. Receiving for > $4,999.99 or State/Federal Funds or for Capital and Controlled Assets
Sourcing with Catalogs vs ProCard

Key Benefits over ProCard:
1. No need for external websites or phone calls
2. No after the fact approvals from ProCard purchases
3. No ProCard reconciliation
4. Electronic invoices
Application Overview
Background for eProcurement Solution

• Productivity
  • Leverage technology to process high-volume, low-value transactions
  • Purchasing can focus on strategic sourcing activities

• Controls
  • Standardized approval processes
  • Improved policy compliance

• Visibility of Spend

• Cost Reduction
  • Leveraged spend to reduce per unit cost
  • Total cost of ownership
Selection of Rowdy Exchange

• Jaggaer (Software as a Service provider) has a strong commitment to higher education
• Ease of use leads to high adoption
• Spend visibility leads to identified savings and negotiated new contracts
• Contract compliance leads to ensured contracted price
• Consortium leads to multi-university use/access
• UTShare partner
Integrated eProcurement Solution

**Procurement Interface**
- Performs *most* Procure-to-Pay activities
- Access to internal UTSA forms

**Financial System of Record**
- Source of Chartfield values & validations
- Vendor Master
- Receives Purchase Orders, Receipts & Invoices
- Generates payments
- Financial reporting

**Supplier Community**
- Hosted & Punchout Catalog Content
- Access to Rowdy Exchange to receive and process POs & post e-Invoices

**Support Team & Knowledgebase**
- Formal Help Desk
- Exchange tips, best practices and questions & answers

**DTS**
- UTSA Vendor Setup and Maintenance
- Invoice & Payment Processing

Office of Financial Affairs
Procure-To-Pay Process

--- Responsible Party ---

- Required for Purchase Orders:
  1. > $4,999.99 (non-Amt. Only)
  2. State and or Federal Funds
  3. Capital & Controlled Assets

- Vendor Submitted e-Invoices

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Office of Financial Affairs
Integration Touchpoints

Rowdy Exchange

- **Authentication**: User Login
- **Spend Director**: Shopping, Create Requisition
- **Requisition Manager**: Approval(s) & Budget Check
- **Order Manager**: Create PO, Distribute PO to Supplier
- **AP Director (limited functionality)**: Receiving >$5k, Transmit e-Invoice

- **Master Data**
  - **User Profile**
  - **Speed Chart** & Account Code Export
  - **Vendor Export**
  - **Requisition and Budget Validation**
  - **PO Import/Encumber Funds**
  - **Receipt Import**
  - **Invoice Import**

*All Related Chartfields*

**Funds are no longer pre-encumbered**
When are receipts required?
New Purchasing Terminology
Rowdy Exchange – eProcurement Marketplace offering one-stop shopping for goods and services

Cart – Basket/list of products or internal forms captured for the creation of a Requisition

PR Validation – “Purchase Request”; process to confirm valid Chartfield combination and available funds to pay for purchase

E-Invoice – “Electronic” invoice submitted through Rowdy Exchange for processing by DTS; no approvals or manual intervention required for payment
Terminology continued…

Non-Catalog Item – The process of placing an order with a supplier when the goods and/or services are not available in either a Hosted or Punchout catalog.

Hosted Catalog – Product content (description, manufacturer part number, etc.) and UTSA pricing are maintained within Rowdy Exchange.

Punch-Out Catalog – The process for a purchaser to buy from the supplier website through Rowdy Exchange. These are the showcase link that will take you directly to the suppliers external UTSA specific website.

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.
Terminology continued…

**Shopper** – All UTSA staff have the ability to shop in Rowdy Exchange. A shopper can browse online catalogs, add items to a shopping cart and assign the cart to a requester for processing and approval.

**Assignee** – User assigned to process the shopping cart. The assignee must be a Requester in order to submit the cart for approval.
Terminology continued…

- **Create Carts**
- **Create Requisitions**
- **Approve Requisitions**

**SHOPPER**

**REQUISITIONER**

**APPROVER**

* Can not approve own cart
Terminology continued…

**UNSPSC** (*United Nations Standard Products and Services Code*) coding will be used in Rowdy Exchange to categorize each item. List of available commodity (UNSPSC) codes is much more robust in new system making finding what you are looking for easier. This coding system is a global standard for categorizing goods and services. Codes are now **eight (8) digits**:

- 2-Digit Segment (Aggregation of Families)
- 2-Digit Family (Familial Grouping)
- 2-Digit Class (Grouped by Function)
- 2-Digit Commodity (Product or Service)

UNSPSC Website: [www.unspsc.org](http://www.unspsc.org)

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**Improved search capacities making it easier to find codes**

**UNSPSC codes defaulted with catalog Items; required on requisition lines**
What does PR Validation check?
General Navigation

Easy Slide-Out Menu and Breadcrumb Navigation

The upper menu banner provides easy access to:
- Your Profile
- Approvals
- System Notifications
- Default Shopping Cart
- Quick Search

Message board for news and links to training/supporting material.
View My Profile

1. Click on "View My Profile" in the Rowdy Exchange Shopper.
2. Select "Cart Assignees" and expand the list to view and manage your assignees.
Default User Settings

- Custom Fields and Chartfield Defaults
  - Header Defaults
  - Default Codes
- Default Addresses
- Cart Assignees (*Shoppers Only*)
- Notification Preferences
  - Search Results
  - Shopping, Carts and Requisitions
Cart Assignees

1. Click on Add Assignee
2. Search for the requester in your department
Cart Assignees (continued)

3. Select your requester under the Action column

4. Set as Preferred
How do you access your profile?
5 Shopping Catalogs & Forms
Types of Catalogs

1. **Hosted**: Item content, image and pricing stored in Rowdy Exchange

   Lens Paper Booklet, 8 x 6 inch, 100 Sheets
   from CAROLINA BIOLOGICAL SUPPLY COMPANY

<table>
<thead>
<tr>
<th>Part Number</th>
<th>Manufacturer Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>634000</td>
<td>634000 - (Carolina Biological Supply Company)</td>
</tr>
</tbody>
</table>

2. **Punchout (Level-2)**
   - Item content, image stored in Rowdy Exchange
   - Direct product/item link to pricing on supplier’s external website

   Xerox Multipurpose Color Paper, 8 1/2in x 11in, 20 Lb, 30% Recycled, Gray, Ream Of 500 Sheets
   from TODAY’S BUSINESS SOLUTIONS LLC

<table>
<thead>
<tr>
<th>Part Number</th>
<th>Manufacturer Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>345702</td>
<td>3R20079 - (Xerox)</td>
</tr>
</tbody>
</table>

3. **Punchout (Direct Link)**
   - Content and pricing housed within external vendor website
   - Link available from Showcase

Office of Financial Affairs
Internal vs. External Catalogs

Rowdy Exchange

TODAY'S Offer
Punchout (L2)

Summus/Dell

Burgoon (HUB)
<table>
<thead>
<tr>
<th>Activity / Description</th>
<th>Hosted</th>
<th>Punchout *</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single-user interface</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Product comparisons</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Price / product control</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Supplier / category preferences</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Organizational favorites</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Robust product flags, CAS numbers</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Related product information</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Configurable goods</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Up-to-date products and pricing</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Availability / backorder info</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Shipping charges / Tax</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Temporary and volume discounts</td>
<td>✔️</td>
<td>✔️</td>
</tr>
</tbody>
</table>

* Punchout functionality varies by supplier

NOTE: No shipping charges unless expedited
# Catalog Supplier Integration

<table>
<thead>
<tr>
<th>Catalog Type</th>
<th>Level-2 Punchout</th>
<th>PO Distribution</th>
<th>E-Invoicing</th>
<th>Electronic Credits</th>
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</thead>
<tbody>
<tr>
<td><strong>Punchout</strong></td>
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<td></td>
<td></td>
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<tr>
<td>Commonwealth Trading Company (Dell)</td>
<td>☑</td>
<td>cXML</td>
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<td>☑</td>
<td>cXML</td>
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<td>☑</td>
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<td>Burgoon (Grainger)</td>
<td>☑</td>
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<td>☑</td>
<td>☑</td>
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<tr>
<td>Possible Missions (Fisher Scientific)</td>
<td>☑</td>
<td>cXML</td>
<td>☑</td>
<td>☑</td>
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<tr>
<td>SHI</td>
<td>☑</td>
<td>cXML</td>
<td>☑</td>
<td>☑</td>
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<tr>
<td>Summus (VWR)</td>
<td>☑</td>
<td>cXML</td>
<td>☑</td>
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</tr>
<tr>
<td>Summus (Dell)</td>
<td>☑</td>
<td>cXML</td>
<td>☑</td>
<td>☑</td>
</tr>
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<td>☑</td>
<td>cXML</td>
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<td>☑</td>
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<tr>
<td><strong>Hosted</strong></td>
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<td></td>
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<td>☑</td>
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<td>BIO-RAD LABORATORIES INC</td>
<td>☑</td>
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<tr>
<td>CAROLINA BIOLOGICAL SUPPLY COMF</td>
<td>☑</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CHARLES RIVER LABORATORIES INC</td>
<td>☑</td>
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</tr>
<tr>
<td>COMBI-BLOCK'S INC</td>
<td>☑</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>EMD MILLIPORE CORPORATION</td>
<td>☑</td>
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<tr>
<td>JACKSON LABORATORY</td>
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<td>QIAGEN INC</td>
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<tr>
<td>SIGMA-ALDRICH INC</td>
<td>☑</td>
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</tr>
</tbody>
</table>
Shopping Guidelines

Shopping Hierarchy:

1. **“Shop From the Top”** – perform a keyword or SKU/Item number search

2. **Search Showcase** – check Showcase and shop by Category

3. **Enter Non-Catalog** – if you know the Supplier and item details, create and submit a non-catalog order *(Requester Only)*

4. **Contact Department Requester** – contact for assistance locating and or processing a non-catalog order
Hierarchy for Shopping

Welcome to THE ROWDY EXCHANGE!
Here you'll find the goods and services you need for your work at The University of Texas at San Antonio. The greatly expanded ROWDY EXCHANGE provides a familiar online shopping experience and negotiated pricing from UTSA's preferred suppliers.

You can search for items by keyword or item number. When you find the item you need, just put it in your shopping cart. If you can't find what you need, click on the Non-Catalog item link, complete the form, and submit.

Issues or Questions?
Contact us at RowdyExchange@utsa.edu

Account Codes for Capitalized & Controller Purchases

Further Reading & Training
  - Punch-out Shopping
  - Non-catalog Item Shopping

Catalog & Form Showcases

UTSA

Office Supplies

My Draft Carts

Shop

Search
Product Keywords, Description, Supplier, Manufacturer

Advanced Search

Shortcuts
Favorites Forms

Browse
Suppliers Categories Contracts

View:

Number Cart Type

Date Total

1829944 2017-04-14 re_requestor 01 My Drafts Assigned to Others 4/14/2017 43.34 USD
Sample Search & Results

1. Search for "paper towels" and view the search results.
2. Add the item to the cart and view the cart.
3. Order the item from the supplier.
Order from Supplier (Level-2)

UTSA Contracted Price

$325.33 / carton
Available Catalogs
Unable to Locate a Non-Catalog Vendor

Vendors “Open for Ordering”

- Only vendors with activity in the last 18 months were set up for ordering.

- If an existing vendor outside that date range is needed, contact DTS to have the vendor updated for ordering in Rowdy Exchange*

- New vendor setup requests remains the same*

* Submit a “Supplier Information Form (SIF)”
Purchasing Forms

Current forms available for go-live, more under development…

- After The Fact
- Exclusive Acquisition
- Copy Machine Order
- PO Change Order
5 Shopping Catalogs & Forms
What is the Shopping Hierarchy?
Requisition to Purchase Order

REQUISITIONER → APPROVER → Purchase Order
Submit a Cart for Processing

Requester

Shopper

Office of Financial Affairs
Submit a Cart for Processing

1. Click on Assign Cart.
2. Select from profile values or search for an assignee.
3. Assign the cart to the user profile or search for an assignee.
Cart Received for Processing

Received from shopper

Office of Financial Affairs
Commodity Codes will default from most catalog items; if not, one must be selected.
Capitalized & Controlled Accounts

Purchases meeting established thresholds must be coded accordingly.

A direct link to the account code list can be found from the home page in the Organization Message.

Issues or Questions?
Contact us at RowdyExchange@utsa.edu

Account Codes for Capitalized & Controller Purchases

Further Reading & Training
- Punch-out Shopping
- Non-catalog Item Shopping
Adding Account & SpeedChart

Account and SpeedChart codes entered at the **Header Level** will default to all lines.

Both codes can be overwritten at the **Line Level** as appropriate.
Amount Only/Continuous POs

For orders that require ongoing invoices (i.e. service contracts or long-term lease agreements)

Enter the following information as a non-catalog item:

1. Quantity of “1”
2. Total quoted/contracted amount
3. Accept default unit of measure of “Each”
4. Set line item(s) to “Amount Only”

NOTE: No receipts required
6 Entering Freight and Discounts

Freight charges entered as a Non-Catalog item

Enter “Net Amount” – Price less discount (negative amounts are not permitted)
Next Fiscal Year Flag

FY18 purchases requiring advance approval, mark the “Next Fiscal Year” flag
Submit a Requisition

Requisition: 1829944
2017-04-14 re_requestor 01
Status: Draft
Document Total: 43.34 USD
What's next for my order?

Requisition
- General
- Shipping
- Billing
- Accounting Codes
- Internal Notes and Attachments
- External Notes and Attachments
- Supplier Information

Final Review
- General
  - Cart Name
  - Description
  - Prepared by
  - Prepared for
  - PO Clauses
  - Purchasing Business Unit
  - Next Fiscal Year
- Department Contact Information
  - Department Contact Name
  - Department Contact Email
  - Department Contact Phone
  - Delivery Location
  - Purchasing Review Required

Submit Requisition
Assign Cart

Office of Financial Affairs
Approval Workflow (Cost Center)

Workflow driven by method of finance (Accounts/SpeedChart) and Commodity Codes; can be previewed before submission
Approval Workflow (Comm./Special)
Approval Workflow (Grants/Projects)
Locating a Returned Cart

Should the requisition be returned for **failed PR Validation** or **rejected workflow approval**, navigate to the My Draft Cart (Dashboard or My Carts and Orders view).
To view comments or action taken against a requisition or purchase order, open the documents and click **History** to view the details.
Use document search features to retrieve a requisition or purchase order that is outside the 90 day view of the dashboards.

Use (1) **Quick Search** if you know the document number or (2) **Document Search** to use more advanced search criteria.
Approving a Requisition

Three (3) methods for approving:

1) Online
2) Email
3) App* (For Release after initial go-live)
Approving a Requisition (Email)

Approving via email: 💌

1. Navigate to **User Profile and Preferences**

2. Create and or change email approval code. Enter a minimum of four characters
Upon receiving an email requesting approval, click the **Take Action** bottom.

Your default web browser will open. You do not need to be logged into Rowdy Exchange.
To approve, enter the Approval Code associated with your profile and click the Approve button.

To reject or take another action, enter the required Approval Code and click Assign to myself.

The requisition is now assigned to you for further action.
PO Creation

Once a requisition has been fully approved and completed, the final PR validation step, the requisition will be sourced to a purchase order.

PO number can be found on the requisition or via the “My Purchase Order” dashboard.
Non-Catalog Manual Distribution

1. Open PO from the dashboard or via Search Documents
2. Within the PO “Summary,” scroll down to the “Distribution Information” section to determine if the order needs to be manually distributed to the supplier.
1. Open PO from the dashboard or via Search Documents

2. From “Document Actions,” select “Print Fax Version”
Non-Catalog Manual Distribution

Purchase order is now ready to be sent to the supplier for fulfillment. The PO can be:

1. Printed and faxed, or

2. Saved as a PDF and emailed

NOTE: If Supplier is used frequently, provide DTS the fax or email address so the Distribution method can be updated for automatic submission to the supplier.
PO Change Order (POC)

- Reasons to submit a POC request
  - To change the Account or Speed Chart (funding source)
  - To change quantity, when reducing items ordered or for match exceptions
  - To change amount or price on non-catalog orders
  - To cancel a PO

- When NOT to submit a POC request
  - To add products to a catalog order; accomplished by placing a new order
  - If any payment has been made against the PO, a journal entry request change required to adjust funding
What action is required after the PO is created?
Requisition to Purchase Order

REQUISITIONER ➔ APPROVER ➔ PO
Receiving & Invoicing
RECEIVING: Entering a receipt is only required for orders more than $4,999.99 (excluding Amount Only) or funded with State or Federal Funds or Capital and Control Assets.
## Receiving

![Screenshot of Receiving interface](image)

### Header Information
- **Receipt Name**: 2017-05-18_re_requestor_B1
- **Receipt Create Date**: 5/18/2017 9:08:28 AM
- **Source**: Manual
- **To Be Assigned**: 5/18/2017
- **Supplier Name**: Sumus - Dell
- **Received by**: Rowdy Exchange Requestor
- **RECEIPT ADDRESS**: The University of Texas at San Antonio, One UTSA Circle, Central Receiving, San Antonio, TX 78249, United States
- **DELIVERY**: Other
- **Tracking No.**
- **Attachments**
- **Notes** (1,000 characters max)

### Receipt Lines
- **PO No.**: PO-000111
- **PO Line No.**: 1
- **Product Name**: OptiPlex 7440 AIO/OptiPlex 7440 AIO B70
- **Catalog No.**: 210-AFLP
- **Qty/UDM ordered**: 5 EA
- **Previous Receipts**
  - **Quantity**: 5
  - **Add to Inventory**: ✔
  - **Line Status**: Received
  - **Actions**: Received, Remove Line, Receive & Return

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Office of Financial Affairs
Receiving Errors

SPECIAL NOTICE: Completed receipts **CANNOT** be reopened or revised once processed through to UTShare (process is run nightly).

If a correction is required, enter a SPOC ticket including the PO and Receipt number.
Order Exception Handling

Receiving/Invoice issues for orders that **DO NOT** require a receipt in Rowdy Exchange

**Conditions of Item Ordered:**

- Not received
- Backordered and never received
- Discontinued or no longer available
- Received damaged or defective
- Received wrong item or substitute item
- Invoiced incorrectly

**Catalog Orders**

Report issue by opening a SPOC ticket

**Non-Catalog Orders**

1. Contact non-catalog supplier directly
2. Submit a Supplier/Vendor Dispute Form to DTS
Invoicing

• Most Punchout vendors will invoice electronically (except for non-catalog orders)

• All other vendors will remit invoices to DTS for processing and payment

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DTS will continue to receive, process and pay invoices
Training Overview
Classroom Training

Current Course Offerings:

1. Rowdy Exchange Overview – AM0869
2. Requester Training (Hands-On) – CT0990

Log on to MyTraining Classroom for available dates and times
Video Snippet Training

UTSA Videos (Coming Soon):

1. Processing a Non-Catalog Order
2. Requisition Approval
3. Creating a Quantity Receipt
4. Copy a Requisition
5. Adding Attachments
General Quick Reference Guide

Add Items to a Shopping Cart
- From Shopping Cart, click Add to Cart button
- Follow Checkout instructions

Itemized Catalogs
- From Home page
- Click Catalog tab
- Select item from catalog
- Click Add to Cart

Checkout (Requester)
- From Shopping Cart, select Proceed to Checkout
- Change Shipping Location
- Select Shipping Address from drop-down menu
- Enter Shipping Address
- Click Save button

″Add Custom Field & Speed Chart Defaults (Requesters Only)″
- Click Default User Settings and then click Custom Field Defaults
- Select the Codes tab, click Edit and Create New Value for Account and Speed Chart

Update Notification Preferences
- Under Development...

Rowdy Exchange: General Quick Reference Guide

The upper menu banner provides easy access to:
- Your profile
- Approvals
- System Notifications
- Default Shopping Cart
- Quick Search

Office of Financial Affairs

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Update Notification Preferences
- Under Development...

Office of Financial Affairs
Support Overview
Rowdy Exchange & UTShare Support

Your Single Point of Contact (SPOC)

The PSSC is ready for your questions! There are three (3) ways to contact us:

1) Telephone: 210-458-SPOC (458-7762)
2) Email: RowdyExchange@utsa.edu
3) Go to UTShare Website: www.utsa.edu/UTShare, link to the SPOC icon for the UTShare ticketing system

Questions raised now through post-go live helps PSSC establish a comprehensive knowledge base and appropriate Service Levels!