2018 - 2019
Rowdy Exchange Requester Training

Purchasing Department
1. Course Objectives
2. Application Overview
3. Terminology
4. Navigation & User Profile
5. Shopping Catalogs and Forms
6. Requisition to Purchase Order
7. Receiving & Invoicing
Course Objectives

• Understand the purchase process in Rowdy Exchange:
  • Processes and terminology
  • Shopping and requisition overview
  • Purchasing forms and instructional guides/material

• How to create requisitions in Rowdy Exchange:
  • How to locate your supplier and/or catalog
  • How to build your shopping cart
  • How to submit your shopping cart
  • How to track the requisition approval process
  • How to track your order
  • How to enter a receipt (Receiving Report)
Application Overview
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
Integration Touchpoints

Rowdy Exchange

Authentication  |  Spend Director  |  Requisition Manager  |  Order Manager  |  AP Director (limited functionality)

User Login  |  Shopping  |  Create Requisition  |  Approval(s) & Budget Check  |  Create PO  |  Distribute PO to Supplier  |  Receiving >$5k  |  Transmit e-Invoice

Master Data

User Profile  |  Requisition and Budget Validation  |  PO Import/Encumber Funds **  |  Receipt Import  |  Invoice Import

Speed Chart * & Account Code Export  |  Vendor Export

All Related Chartfields *
Funds are not pre-encumbered **

Purchasing Department
2 Procure-To-Pay Process

Cart → Requisition → Approve Requisition → Purchase Order (PO) → Receipt → Invoice → Payment

SHOPPER → REQUISITIONER → APPROVER → PO → Receipt → Invoice → Payment

Purchasing Department
Purchasing Terminology
**Terminology**

**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.

**Requester** – Can shop and submit the cart for approval.

**Assignee** – The assignee must be a requester in order submit the cart for approval.

**Dashboard** – A view of the Rowdy Exchange “desktop,” which can be customized to present key information for the user.

**Showcase** – A collection of catalogs available for shopping. Catalogs are awarded through processes that comply with UTSA Purchasing rules.
Terminology continued...

**Create Carts**

**Create Requisitions**

**Approve Requisitions**

* Can not approve own cart

**SHOPPER**

**REQUISITIONER**

**APPROVER**

Purchasing Department
Terminology continue...

**Rowdy Exchange** – eProcurement Marketplace offering one-stop shopping for goods and services

**Cart** – Basket/list of products, services 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 processed through Rowdy Exchange from Punch-out vendors for payment
Navigation & User Profile

Hands-On: Update User Profile Defaults
The upper menu banner provides easy access to:
- Your Profile
- Approvals
- Notifications
- Shopping Cart
- Quick Search

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

1. View My Profile
2. Default User Settings
3. Custom Field and Chartfield Defaults
   - Default Addresses
   - Cart Assignees

Purchasing Department
4 Default User Settings

- Custom Fields and Chartfield Defaults
  - Header (internal/external)
  - Codes (Speed Chart)
  - Delivery Location
- Notification Preferences
  - Search results
  - Shopping, carts and requisitions
4 Entering Speed Chart Values

1. Click on **Create New Value**

2. Search for the desired **Speed Chart (cost center)** value
3. Select the desired value (cost center)

4. Click **Add Values**
   - If you have more than one cost center click all that are applicable

5. Set Default
   - update
Catalogs, Non-catalogs & Procurement Forms
Catalogs & Forms

**Non-Catalog Item** – A supplier not listed on the Rowdy Exchange home page.

**Hosted Catalog** – A supplier listed on the home page that provides product content (description, manufacturer part number, etc.).

**Punch-Out Catalog** – A supplier with electronic workflow (purchase order automatically routes to supplier and invoice automatically routes through Rowdy Exchange).

**Procurement Forms**
Unable to Locate a Non-Catalog Vendor

UTSA Supplier Information Form (SIF) required

- New vendors
- Update vendor information (address and/or financial institution)

Vendor must send completed form directly to Disbursements & Travel Services (DTS)

- Fax: 210-458-4829
- Mail: The University of Texas at San Antonio Disbursements & Travel Services
  One UTSA Circle
  San Antonio, Texas 78249
### Hosted vs. Punchout Catalogs

<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
Sample Search & Results
General Stores Orders

Process flow for General Stores orders:

1. Requisition approved and PO created (prefixed with “GS-”)
   • No encumbrance since orders are not exported to UTShare
2. Purchase order is automatically emailed to Central Receiving
3. Central Receiving processes and delivers order to department
4. At the end of month, Central Receiving bills the department through the IDT process in UTShare
Requisition to Purchase Order

Requisitioner → Approver → Purchase Order

Purchasing Department
### Department Contact Information

<table>
<thead>
<tr>
<th>Department Contact Name</th>
<th>Penny Abraham</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department Contact Email</td>
<td><a href="mailto:penny.abraham@utsa.edu">penny.abraham@utsa.edu</a></td>
</tr>
<tr>
<td>Department Contact Phone</td>
<td>210-458-5555</td>
</tr>
</tbody>
</table>

**Edit Contact Details**
Commodity Codes

- **UNSPSC** (United Nations Standard Products and Services Code) coding will be used in Rowdy Exchange to categorize each item. UNSPSC website: [www.unspsc.org](http://www.unspsc.org) **UNSPSC codes are required on requisition lines and defaulted with catalog items.**
• Account codes and SpeedChart entered at the **Header Level** will default to all lines

• Both Account codes and SpeedChart can be overwritten at the **Line Level**, as appropriate

• If multiple Account codes are used, add Speed Chart at **Line Level**
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: Do not receive
6 Entering Freight and Discounts

Freight changes entered as a Non-Catalog item

Enter “Net Amount” – Price less discount (negative amounts are not permitted)
Sections can be modified prior to submission
Submit a Cart for Processing

Cart Name & Description

Requester

Shopper
Approval Workflow (Cost Center)

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

PR Approvals

Show skipped steps: off
Orientation: Horizontal

Submitted
Future

Initial PR Validation
Future
view approvers

Wait for Initial PR Validation
Future
view approvers

RSC Grants Approval
Future
view approvers

Commodity/Special Approval
Future
view approvers

Purchasing Review
Future
view approvers

Final PR Validation
Future

Wait for Final PR Validation
Future
view approvers

Create PO
Future

Finish

Purchasing Department
Approval Workflow (Grants/Projects)

PR Approvals

Show skipped steps
Orientation: Horizontal

Submitted
Future

Initial PR Validation
Future
view approvers

PI Grants Approval
Future
view approvers

PM Grants Approval
Future
view approvers

Final PR Validation
Future
view approvers

RSC Grants Approval
Future
view approvers

Wait for Initial PR Validation
Future
view approvers

Wait for Final PR Validation
Future
view approvers

Create PO
Future

Finish

Purchasing Department
Locating a Returned Cart

If you receive an email that your requisition has 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.
Methods for Approving a Requisition

Three (3) methods for approving:

1) Online

2) Email

3) App

For Approver training go to: http://www.utsa.edu/pds/rowdyexchange/
1. Open PO from the dashboard or via Search Documents

2. From “Document Actions,” select “Print Fax Version”

3. Print and fax, or save as a PDF and email as an attachment to the vendor
PO Change Order (POC)

• Reasons to submit a POC request
  ✓ To change the Account or Speed Chart (funding source)
  ✓ To change quantity on non-catalogs orders
  ✓ To change amount or price on non-catalog orders
  ✓ To cancel a PO

• DO NOT submit a POC request
  X To add products to a catalog order; instead create a new requisition
  X If payment has been made against the PO
  X To cancel lines on catalog orders; instead send email to Purchasing@utsa.edu to have line or PO closed and the remaining funds disencumbered
Key Points:

✓ Enter new total amount on the POC form for approval

✓ Once POC completed, buyer will approve change request; requisition will show approved
Receiving & Invoicing
Receiving

Entering a receipt is **required** for orders funded with **State or Federal Funds** or **Capital and Control Assets** or more than **$4,999.99** (excluding Amount Only)

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State Fund Codes: 21xx (any fund code starting with 21)

Fund Codes: 5100 – 5499 (Federal, state, local and private grants, contracts and agreements (majority is federal))

**Capital:** Any equipment, other than software purchased on 09/01/09 or later, with a unit cost of $5,000 or more is considered ‘capitalized equipment’ and is recorded to UTSA’s inventory.

**Controlled Items ($500 to $4,999.99):** Stereo Systems, Cameras / Video Recorders, Computers, Data Projectors, TV/VCR/Camcorder/Laserdisk Player,

**Controlled Items (at any cost):** Guns: handguns, rifles, automatic weapons, shotguns, Artwork

**NOTE:** DTS will not process payment if receiving report has NOT been completed
Order Exception Handling

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

**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

**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

Purchasing Department
Rowdy Exchange & UTShare Support

Your Single Point of Contact (SPOC)

The PSSC is ready for your questions!
1. Telephone: 210-458-SPOC (458-7762)
2. Email: spoc@utsa.edu
3. Go to UTShare Website: http://www.utsa.edu/bis - Ticketing System

Additional Rowdy Exchange Resources: http://www.utsa.edu/pds/rowdyexchange/