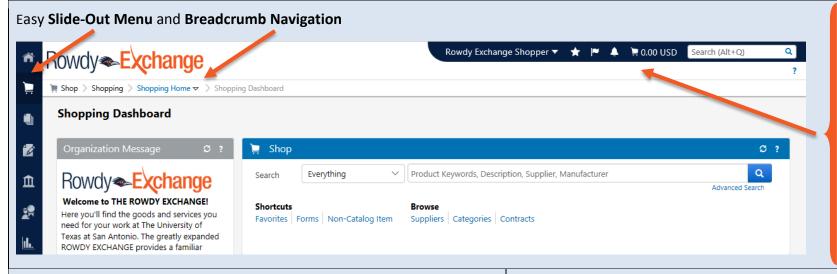
# Rowdy Exchange: General Quick Reference Guide

UTSA eProcurement System – www.utsa.edu/rowdyexchange

Need Assistance? Contact your Single Point of Contact (SPOC) at 210-458-SPOC (458-7762) or through www.utsa.edu/UTShare





The upper menu banner provides easy access to:

- Your Profile
- Approvals
- System Notifications
- Default Shopping Cart
- Quick Search

Manage Your Profile: Click your name in the banner, click View My Profile

### Add Default Cart Assignees (Shoppers Only)

- Click Default User Settings and then click Cart Assignees
- Click Add Assignee... button
- Enter Requester's Last Name and click **Search** and click **Select** next to the desired user/requester
- To add more Requesters, repeat process for each additional user
- To set a default assignee, click Set as Preferred

# Add Default Address, Delivery Location & Contact Information

- Click Default User Settings and then click Default Addresses
- Click Select Addresses for Profile button
- From Select Address Template, select the Building name from available list
- Accept default Nickname and click Save
- Click Custom Field and Chartfield Defaults, then select Header (int.) tab
- Click Edit to right of Delivery Location and Create New Value default value from available list (Requester Only)
- Select the Header (ext.) tab, click **Edit** and **Create New Value** for **Department Contact Name**, **Email** and **Phone**.

# Add Custom Field & Speed Chart Defaults (Requesters Only)

- Click **Default User Settings** and then click **Custom Field and Chartfield Defaults**
- Select the Codes tab, click Edit and Create New Value for Account and Speed Chart.

### **Update Notification Preferences**

- Click Notification Preferences and then select the desired area (i.e. Shopping, Carts & Requisitions)
- Click **Edit Section** in the upper right corner of the Notification Preference
- Select **Override** next to the item to be changed and then toggle to the desired notification method (None, Email, Notification, Email & Notification)
- Click Save Changes once update completed

### **Add Items to a Shopping Cart**

#### **HOSTED CATALOGS**

- From Home page, Shop
- Use quick search text box then click Search
- Or Browse by Supplier, Category, etc.
- Click Add to Cart button
- Follow Checkout instructions

### **EXTERNAL CATALOGS (PUNCHOUT)**

- From Home page
- External Catalogs section, click supplier's icon to access external catalog
- Search in supplier's catalog for items and add to supplier's shopping cart
- Confirm order in supplier's site to return item(s) to Rowdy Exchange cart
- Follow Checkout instructions

#### **NON-CATALOG ITEM**

- From Home page, click Non-Catalog Item
- Enter Supplier name
- Select the appropriate supplier
- Enter product information
- Click **Save and Close** for a single item from this supplier
- Click **Save and Add Another** for multiple items from the same supplier
- Follow Checkout instructions

When all items have been added to the shopping cart, click Proceed to Checkout button

# **Assign Cart (Shopper)**

#### **ASSIGNING A CART FOR PROCESSING**

- From draft Shopping Cart, click Assign Cart
- If no defaults, select Search for an assignee or Select from all values
- Enter search criteria
- Click Search button
- Click Select assignee
- Click Assign button

# **Checkout (Requester)**

From draft Shopping Cart, select Proceed to Checkout

#### **CHANGE SHIP TO LOCATION**

- Select Shipping
- Click Edit under Ship To section
- Select **Shipping Address** from drop-down menu *If a One-Time Ship-To Location* 
  - Select **ADHOC** from drop-down list
  - Enter ATTN, Address Line 1, Building/Ste/Rm, City, State and Zip Code
- Click Save button

### **APPLY SPLIT ACCOUNT (CHARTFIELD) CHARGES**

To edit accounting splits for all line items:

 Under Accounting Codes, click Edit button in the right hand corner of the header section (continue with General Instructions)

#### -OR-

To edit accounting splits for individual line items:

Under Accounting Codes in the Lines section, click
 Edit for the desired line number (continue with
 General Instructions)

#### **GENERAL INSTRUCTIONS:**

To split charges:

- Click add split link (repeat as required)
- Select % of Price, % of Qty, Amount of Price or Amount of Qty from drop-down menu
- Enter Amount of split

For all edits/splits:

- Beneath Account and Speed Chart field, click Select from profile values or Select from all values to choose appropriate values
- Search for Account or Speed Chart by Value (Account/Speed Chart) or Description
- Click **Select** button next to appropriate value
- Click Save button

### **Document Search**

### FIND AN ORDER (BY REQUISITION OR PO)

Click document search on navigation bar

- Enter Requisition or PO number into search box
- Click **Go** button

#### VIEW APPROVAL STATUS AND HISTORY

Display the Requisition on your screen

- Click Requisition Approvals tab for all workflow approval steps and the status of each step
- Click **History** tab for all actions taken on the requisition

### **Approvals (Approvers)**

Go to Orders & Docs. > Approvals > My Approvals

#### **APPROVE A REQUISITION**

- In My Approvals list, click the desired Requisition
  No. to open the requisition
- Review the items, ship to address, charging instructions and notes – edit if necessary
- Select **Approve/Complete Step** in the Available Actions drop-down menu
- Click Go

#### **REJECT A REQUISITION**

- In My Approvals list, click the desired Requisition
  No. to open the requisition
- Select **Reject Requisition** from the Available Actions drop-down menu
- Click Go
- Reject Requisition box appears type in your reason
- Click Reject Requisition button

### **RETURN A REQUISITION**

- In My Approvals list, click the desired Requisition
  No. to open the requisition
- Select Return to Requisitioner in the action dropdown menu
- Click Go
- Return to Requisitioner Reason box appears type in your reason
- Click Return to Requisitioner button