

# Check-In for Class

## ***Three ways for you to check-in:***

- *Click link in Chat Box provided by facilitator*
- *Use QR code (open camera on your smart phone)*
- *Open your browser and type in the web address below*



<https://mytraining.utsa.edu/apps/checkin>

*If you get an alert that you are not enrolled in the class, please let your facilitator know.*

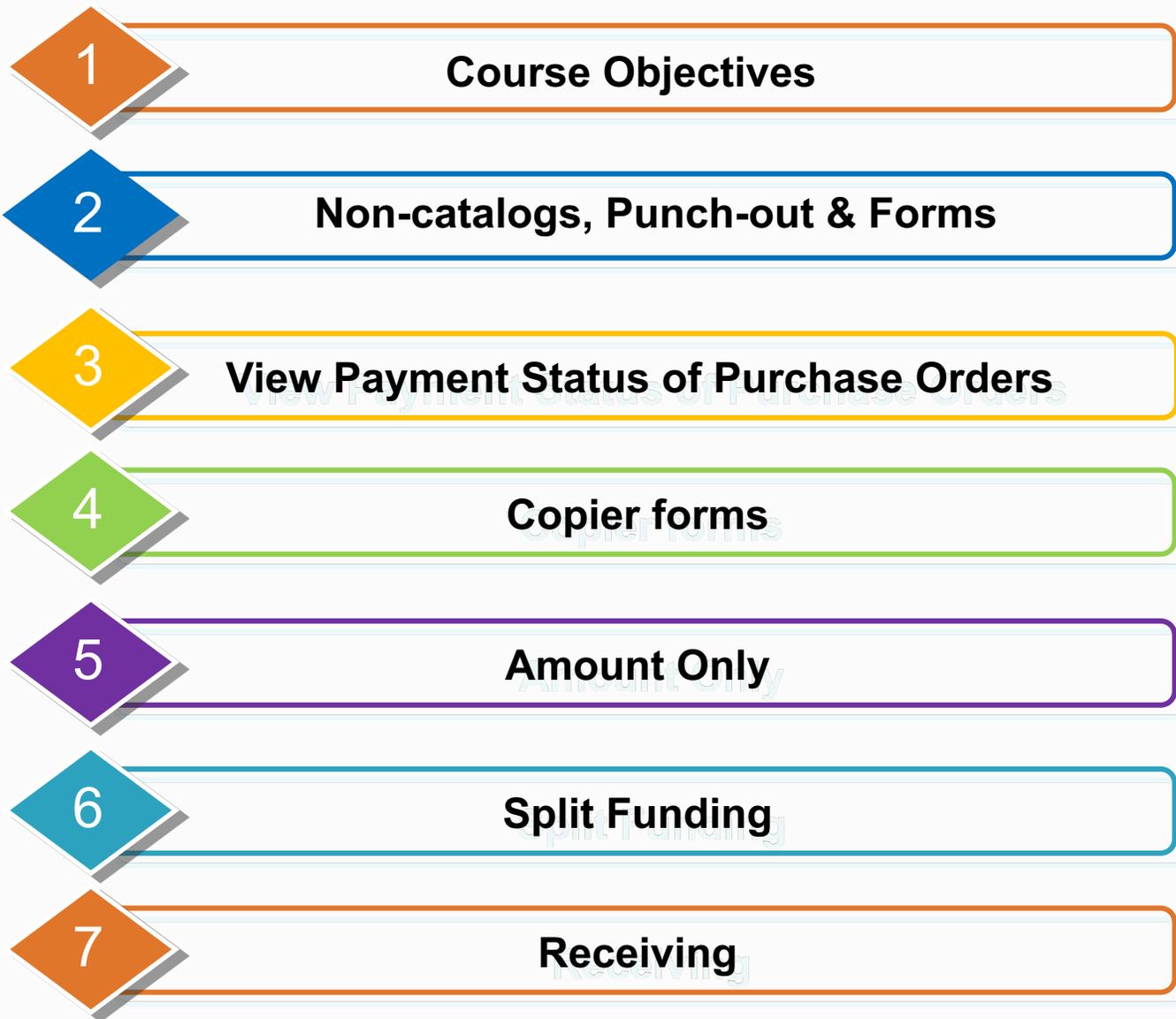
***Enjoy your class!***



# Rowdy Exchange Intermediate Requester Training

**CT0893**





# Course Objectives

- When to use Non-Catalog, Punch-out and Procurement Forms
  - Non-Catalog Orders
  - Punch-out
    -  Punch-out Invoices
- How to view status of payment for Purchase Orders
- How to complete Copier forms
- How to split funding
  - Cost Centers and Project ID's
  - Account Codes
- How to correctly use 'Amount Only'
- When to receive and when not to receive an item
  - Partial receiving



## 5 **Non-catalogs, Punch-out & Procurement Forms**

# Non-Catalog Items

The screenshot displays the RowdyExchange procurement portal interface. At the top, the navigation bar includes 'Home', 'Shop', 'Documents', 'Contracts', 'Accounts Payable', 'Suppliers', 'Sourcing', 'Reporting', 'Administer', and 'Setup'. The 'Shop' section is active, showing a 'Shopping Dashboard' with an 'Organization Message' and a search bar. The search bar has tabs for 'Simple', 'Advanced', and 'Non-Catalog Item' (which is highlighted with a red box). Below the search bar, there are options to 'Browse: Suppliers | Categories | Contracts'. The 'My Draft Carts' section shows 'All Drafts' and 'No results found'.

RowdyExchange

Purchase Orders ▾ Search (Alt+Q) 🔍 0.00 USD 🛒 ❤️ 2 🗨️ 1,435

Shop • Shopping Dashboard

### Organization Message

**Welcome to RowdyExchange**  
Your one-stop shop for procurement and business contracting needs.

- o **Purchasing TIP** - Early submission of a funded requisition will help expedite procurements.
- o **STAPLES** has been added to the catalog showcase for Office Supplies.
- o **HiEd** has been added to the catalog showcase for Apple Products.
- o Coordinate **Copy Machine and Multi-Function Device** renewals or new leases through Purchasing.
- o Remember to keep your **Airgas cylinder rental** payments up to date

### Shop

Simple | Advanced | Go to: Favorites | Forms | **Non-Catalog Item** | Browse: Suppliers | Categories | Contracts

Search for products, suppliers, forms, part number, etc. 🔍

### My Draft Carts

Draft Cart Type: All Drafts ▾

No results found

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

**Punch-Out Catalog**

**Procurement Forms**

The screenshot shows a 'Catalog & Form Showcases' interface with several categories. Red boxes highlight specific items, and orange arrows point from the text labels on the left to these items:

- Office Supplies:** Staples (Summus Industries (H&E)) and Today's Office Punchpad (L2).
- Technology:** Dell EMC, Shi, Dell (Summus (H&E)), and Apple Products.
- Science and Research - Equipment and Tools:** Agilent, BIO-RAD, CAROLINA, and Imbriox. Additionally, a red box highlights a 'Parker Scientific Possible Mixators (H&E)' item, and another red box highlights a 'VWR Scientific Summus VWR' item.
- MRO / Facilities:** A red box highlights a 'GRANINGER Sponges (H&E)' item.
- Procurement Forms:** After The Fact, Copy Machine Form (Centra), Konica Minolta Copy Machine, and PO Change Order.

# Non-Catalog Navigation

The screenshot displays the RowdyExchange procurement portal interface. On the left is a dark blue navigation sidebar with icons and labels for: Home, Shop (highlighted in orange), Documents, Contracts, Accounts Payable, Suppliers, Sourcing, Reporting, Administer, and Setup. The main header area includes the RowdyExchange logo, a 'Purchase Orders' dropdown, a search bar with the text 'Search (Alt+Q)', a currency indicator '0.00 USD', and notification icons for a shopping cart (2 items) and a user profile (1,435). Below the header is a 'Shop • Shopping Dashboard' breadcrumb. The main content area features an 'Organization Message' section with a 'Welcome to RowdyExchange' heading and a list of purchasing tips. Below this are two panels: 'Shop' and 'My Draft Carts'. The 'Shop' panel has tabs for 'Simple' and 'Advanced', a 'Go to:' menu with 'Non-Catalog Item' highlighted in a red box, and a search bar with the placeholder text 'Search for products, suppliers, forms, part number, etc.'. The 'My Draft Carts' panel shows a 'Draft Cart Type' dropdown set to 'All Drafts' and a message 'No results found'.

# Non-Catalog Navigation Continued

### Add Non-Catalog Item ✕

**Existing Supplier**

Select Supplier

**Item** ⌵

Description <span>★</span>	Catalog No.	Quantity <span>★</span>	Price	UOM
<input type="text"/> <small>254 characters remaining</small>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Each <span>⌵</span>

**Additional Details** ⌵

Commodity Code

**Product Flags**

- Controlled substance
- Recycled
- Hazardous material

★ Required fields

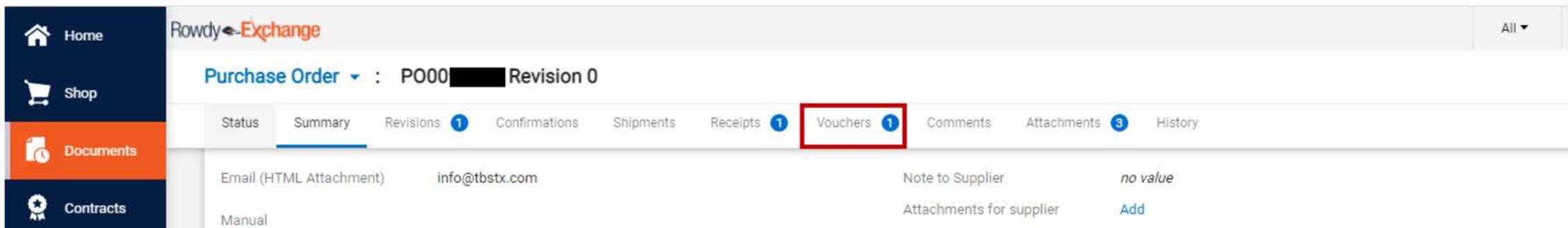
## Punch-out

- **Burgoon (Grainger)**
- **Commonwealth (Dell)**
- **HiED (Apple Products)**
- **Possible Missions (Fisher Scientific)**
- **Shi (Dell)**
- **Summus (Dell)**
- **Summus (Staples)**
- **Summus (VWR)**
- **Today's Business Solutions (Office Depot)**

**Punch-Out Catalog** – A supplier with electronic workflow (purchase order automatically routes to supplier **and** invoice automatically routes through Rowdy Exchange). **Cannot be changed or cancelled after PO has dispatched.**

# Punch-out Invoice

- “Vouchers” are the equivalent of “Invoice” in Rowdy Exchange.
- “Vouchers” are located at the top of the PO.
- Click on Vouchers to view invoices.



The screenshot displays the Rowdy Exchange web application interface. On the left is a dark blue navigation sidebar with icons and labels for Home, Shop, Documents, and Contracts. The main content area has a header with the Rowdy Exchange logo and a dropdown menu for 'Purchase Order' showing 'PO00 [redacted] Revision 0'. Below the header is a horizontal menu with tabs: Status, Summary, Revisions (1), Confirmations, Shipments, Receipts (1), Vouchers (1), Comments, Attachments (3), and History. The 'Vouchers' tab is highlighted with a red rectangular box. Below the tabs, there are two rows of information: 'Email (HTML Attachment) info@tbstx.com' and 'Manual', followed by 'Note to Supplier no value' and 'Attachments for supplier Add'.

# Punch-out Invoice (Cont.)

- (R00xxxxx) identifies invoice as an electronic invoice submitted through the system, it is also the voucher number when viewing in Peoplesoft.
- Click on Voucher No. to view and print an individual invoice.
- Supplier Voucher Number is the invoice number the Supplier uses to track and record payments.

The screenshot shows the Rowdy Exchange interface for a purchase order. The breadcrumb trail is 'Purchase Order > PO00 [redacted] Revision 0'. The 'Vouchers' tab is active, showing one record. The record details are as follows:

Voucher No.	Supplier Voucher No.	Voucher Date	Due Date	Voucher Type	Payment Status	Voucher Total	Invoiced By
R0027174	176264483001	6/3/2021	6/10/2021	Voucher	Payable	188.10 USD	System

# Punch-out Invoice (Cont.)

**Rowdy Exchange** | All ▾

Voucher ▾ : R0027174

Summary | Matching | Comments **1** | Attachments | History

**General** ✎ ⋮

Voucher Type: Voucher

Pay Status: Payable

Voucher Number: R0027174

Supplier Voucher No.: 176264483001

Supplier Name: TODAY'S BUSINESS SOLUTIONS, LLC

Voucher Date: 6/3/2021

Discount Date: no value

Due Date: 6/10/2021

Terms: 0% 0, Net 7

Terms Discount: 0.00 USD

Voucher Name: no value

Delivery Location: ITRESCOLL  
ITCRESCOLL Room Unknown

Purchasing Business Unit: UTSA1  
UTSA

Contains substituted item(s): ✕

Voucher Source: Electronic

**Addresses** ✎ ⋮

Remit To: no value

**Payment Information** ✎ ⋮

Accounting Date: 6/3/2021

**Notes/Attachments** ✎ ⋮ ▾

External Note: Extrinsic: REQUISITIONID= | Extrinsic: COMPANYNAME=University of...  
[Show more](#)

Internal UTSA Notes: no value

Internal Attachments: [Add](#)

**Discount, Tax, Shipping & Handling** ✎ ⋮

Discount, tax, shipping & handling

Allocation	Weighted	Header-level
Discount		0.00 USD
Tax 1		0.00 USD
Tax 2		0.00 USD
Shipping		0.00 USD
Handling		0.00 USD
<b>Total</b>		<b>188.10 USD</b>

# Punch-out Invoice (Cont.)

- Home
- Shop
- Documents
- Contracts
- Accounts Payable
- Suppliers
- Sourcing
- Reporting
- Administer

Rowdy Exchange All ▾

Voucher ▾ : R0027174

Summary Matching Comments 1 Attachments History

Item(s)

Voucher Source: Electronic

Export Date: 6/4/2021 8:00 AM

**Codes**  ...

LINE

GL Unit	Account	Speed Chart	Fund	Department	Cost Center	Function	Program	PC Business Unit	Project-Activity	Project2	Project3
UTSA1	63003 Office/Computer Supplies	EGK025 ITC-OFC EXEC DIRECTOR	2115 E&G Special Items (i.e. SALSI)	CTR049 INSTITUTE FOR TEXAN CULTURES	EGK025 ITC-OFC EXEC DIRECTOR	400 Academic Support	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>

# Punch-out Invoice (Cont.)

PO00 [REDACTED] ...

Status	PO Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	✓	1 Canon 118, Black Toner Cartridge (2662B001AA)	574974	EA	94.05	Qty: 2 EA	188.10	...

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ITEM DETAILS ↕ ✎

Manufacturer Name	CANON USA, INC.	Contract:	<i>no value</i>	External Note to Suppliers	Extrinsic: UNSPSC=44103103
Manufacturer Part Number	2662B001AA	Voucher Owner	Kristin Aguero	Internal Note	<i>no value</i>
Supplier Part Auxiliary ID	574974	Substitute Item	✗	Internal Line Attachments	<a href="#">Add</a>
<a href="#">more info...</a>		Taxable	✗		
		Line Match Status	Do Not Match		

Matching Summary

	Ordered	Received	Net Invoiced
Quantity	2	2	2
Ext. Price	188.10 USD	--	188.10 USD

# View Payment Status of Purchase Order

- Employee Self Service > Review PO Information

\*Note: If tile is not on Employee Self Service home page > Employee Self Service > Navigator > Financials > Purchasing > Purchase Orders > Review PO Information > Purchase Orders

- PO ID: Enter PO number  
(i.e. PO0050000)

**Employee Self Service**

### Purchase Order Inquiry

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Keyword Search](#)

**Search Criteria**

Business Unit	=	UTSA1	🔍
PO ID	begins with	PO0050000	🔍
Contract SetID	begins with		🔍
Contract ID	begins with		🔍
Release Number	=		
Purchase Order Date	=		📅
PO Status	=		▼
Short Supplier Name	begins with		🔍
Supplier ID	begins with		🔍
Supplier Name	begins with		🔍
Buyer	begins with		🔍
Buyer Name	begins with		🔍

Case Sensitive

**Search** [Clear](#) [Basic Search](#) [Save Search Criteria](#)

**Type complete PO number**

# View Payment Status of Purchase Order (Cont.)

- Search

Employee Self Service
Purchase Order

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Purchase Order Inquiry

Purchase Order

Business Unit UTSA1  
PO ID PO0050000

**PO and Budget status**  
 PO Status Compl  
 Budget Status Valid

**Header**

PO Date 03/13/2018

Supplier Name CELLISCO-001 Backorder Status Not Backordered

Supplier ID 0000037246 [Supplier Details](#) **Receipt Status** Receipt Status Received

Buyer generic buyer assignment ID  Hold From Further Processing

PO Reference [Click to view payments](#)

[Activity Summary](#)

[Header Comments...](#)

Matching [Document Status](#)

[Actions](#)

**Amount Summary**

Merchandise	55.00
Freight/Tax/Misc.	0.00
<b>Total</b>	<b>55.00 USD</b>
<b>Encumbrance Balance</b>	<b>0.00 USD</b>

**Remaining balance**

**Lines** Personalize | Find | View All | | | First 1-2 of 2 Last

Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status		
1		Benjamin Garrison-Administrati	44120000	1.0000	BX	27.50 USD	Closed		
2		Shannon Rios- ACAD ADVISING CO	44120000	1.0000	BX	27.50 USD	Closed		

Return to Search
 Notify
 Related

# View Payment Status of Purchase Order (Cont.)

- Click on Document Status

**Document Status**

Business Unit: UTSA1  
 Document Date: 03/13/2018  
 Currency: USD  
 Buyer: generic buyer assignment ID

PO ID: PO0050000  
 Status: Compl  
 Document Type: Purchase Order  
 Merchandise Amt: 55.00  
 Budget Status: Valid

Process Flow: Requisitions | Sourcing Events | Procurement Contracts | Purchase Orders | Service Work Orders | **Receipts(1)** | Returns | Vouchers(1) | Payments(1)

Associated Document Table:

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry
▼ Actions		UTSA1	Receipt	RC-0006677	Received	04/03/2018			<a href="#">📄</a>
▼ Actions		UTSA1	Voucher	00162422	Posted	03/21/2018			<a href="#">📄</a>
▼ Actions	UTSHR		Payment	3100124054	Posted	05/01/2018	0000037246	UTSA01	<a href="#">📄</a>

**For additional information click on Doc ID**

# Copy Machine Form

Click on one of the Copy Machine Forms and complete all data fields then add to cart.

The screenshot displays the Rowdy Exchange procurement portal. The header includes the logo and a breadcrumb trail: Shop > Shopping > Shopping Home > Shopping Dashboard. The main content area is organized into several sections:

- Possible Missions (HUB)**: A button with the text "Possible Missions (HUB)".
- QIAGEN**: A button featuring the QIAGEN logo.
- Summus/VWR**: A button with the text "Summus/VWR".
- MRO / Facilities**: A section header with a dropdown arrow, containing a button for **GRAINGER Burgoon (HUB)**.
- Procurement Forms**: A section header with a dropdown arrow, containing four buttons:
  - After The Fact**: A button with a warning triangle icon.
  - Copy Machine Form (General)**: A button with a printer icon.
  - Konica Minolta Copy Machine**: A button with a printer icon.
  - PO Change Order**: A button with a document icon.

# Copy Machine Order (Cont.)

Form
History

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**Copy Machine Ordering Instructions** ?



## GENERAL COPY MACHINE ORDER

Ordering Instructions:

The purpose of this form is to request a new multi-function copy machine for your department or to request a new purchase order for the renewal of an existing copier lease. All of the information required for an order is included on this form.

Commodity Code: 80161801 Photocopier rental or leasing service

The equipment location is the location where the copy machine physically resides. Ex: BRG 1.102

Associated Costs: Price will be the rate you will be paying on a monthly basis for the Lease of the Machine. Quantity will be the number of months remaining in the fiscal year that will be paid for on this purchase order. Included Add-Ons: Please list all items included in the lease rate such as Fax Options, Finishers, etc.

Lease Identification Number will be the quote and/or contract number assigned to you by the vendor. Lease Start Date will be the first day the lease begins. Lease End Date will be the final day of the entire contract. Note: If you have a three (3) year contract, the lease end date will be three years from now.

**Supplier** ?

**Supplier Information:**

**Supplier:** KONICA MINOLTA BUSINESS SOLUTIONS USA [more info...](#)

**Fulfillment Address:** ROWDY EXCHANGE: (preferred)  
2100 WASHINGTON BLVD STE 100  
ARLINGTON, VA 22204-5720 US

**Commodity Code:**  [search...](#)

**Machine/Equipment Information** ?

**Provide Location, Make, Model & Serial# below:**

**Equipment Make/Model Number:**

**Equipment Serial Number:**

**Equipment Location:**

**Equipment Attributes** ?

**Associated Costs**

Monthly Lease Rate and Quantity

Description	Price	Quantity	Ext. Price
Konica Minolta Copier for 09/01/2019 - 8/31/2020	237.99	12	2,855.88

**Number of Black and White Copies Included in Lease (if applicable)**

**Dollar Amount Allotted for Black and White Overages**

**Cost of Black & White Overages (Per Copy)**

**Number of Color Copies Included in Lease (if applicable)**

**Dollar Amount Allotted for Color Copy Usage**

**Cost of Color Overages (Per Copy)**

**Included Add-Ons**

# Copy Machine Order (Cont.)

<b>Equipment Attributes Total:</b>		<b>4,355.88</b>
<b>Contract Information</b> ?		
<b>Lease Identification Number</b>	TBD	
<b>Lease Start Date</b>	7/1/2019 <small>mm/dd/yyyy</small>	
<b>Lease End Date</b>	6/30/2022 <small>mm/dd/yyyy</small>	
<b>Requested Delivery Date</b>	<input type="text"/> <small>mm/dd/yyyy</small>	
<b>Terms and Conditions</b>	<p>INC., ("LESSOR", "WE", "US", "OUR", AND/OR "VENDOR") AND THE UNIVERSITY OF TEXAS AT SAN ANTONIO ("UNIVERSITY", "UTSA", "YOU", "YOUR", "INSTITUTIONAL PARTICIPANT", AND/OR "CUSTOMER"). FOR ALL PURPOSES UNDER THE MLA, THIS ORDER CONSTITUTES A "SCHEDULE" AS DEFINED AND USED IN THE MLA. IT IS THE INTENT OF THE PARTIES THAT THIS ORDER BE SEPARATELY ENFORCEABLE AS A COMPLETE AND INDEPENDENT AGREEMENT, INDEPENDENT OF ALL OTHER PURCHASE ORDERS TO THE MLA. THE PARTIES ACKNOWLEDGE THAT THE MLA TERMS AND CONDITIONS SHALL CONTROL OVER AND SUPERSEDE ALL PREPRINTED TERMS AND CONDITIONS LISTED ON, OR REFERENCED IN CONNECTION WITH THIS ORDER.</p> <p>DATES OF SERVICE FOR THIS PURCHASE ORDER:          SEPTEMBER 1, 2019 THROUGH AUGUST 31 2020.</p>	
<b>Attachments</b> ?		
<b>Internal Attachments</b>	<input type="button" value="Add Attachments"/> <a href="#">Konica Minolta Qu...</a> <span style="float: right;">Remove</span>	
<b>External Attachments</b>	<input type="button" value="Add Attachments"/>	
<b>Total</b>		<b>4,355.88</b>
<a href="#">See configuration for this form</a>		

# Copy Machine Order (Cont.)

Once form has been added to your cart scroll down to Lines and check “Amount Only”

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	✓ <a href="#">Copy Machine Order Form</a>			1,146.56	Qty: 1	1,146.56	⋮ □
^ ITEM DETAILS  							
Contract:	<i>no value</i>		Requisition Number	<a href="#">137591062</a> <a href="#">view</a>   <a href="#">print</a>			
Taxable	✗		External Note to Suppliers	<i>no value</i>			
Commodity Code	80161801 / Photocopier rental or leasing service		Attachments for supplier	<a href="#">Add</a>			
Service End Date (mm/dd/yyyy)	08/31/2021		Internal Note	<i>no value</i>			
<b>Amount Only</b>	✓						
Service Start Date (mm/dd/yyyy)	12/01/2020						

# 6 Amount Only POs

For orders that require ongoing invoices (i.e., freight, 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: \*Freight charges may result in multiple deliveries requiring multiple invoicing which is why we use “Amount Only” DO NOT RECEIVE!!!**

2	✓ Freight	EA	75.00	Qty: 1 EA	75.00	⋮
^ ITEM DETAILS 						
Contract:	no value	Requisition Number	144524634 <a href="#">view</a>   <a href="#">print</a>			
Taxable	✗	External Note to Suppliers	no value			
Commodity Code	78121603 / Freight fee	Attachments for supplier	<a href="#">Add</a>			
Service End Date (mm/dd/yyyy)	no value	Internal Note	no value			
Amount Only	✓					
Service Start Date (mm/dd/yyyy)	no value					

# Amount Only (Cont.)

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	✓ <a href="#">Copy Machine Order Form</a>			1,146.56	Qty: 1	1,146.56	... <input type="checkbox"/>
<p>^ ITEM DETAILS </p> <p>Contract: <i>no value</i>      Requisition Number: <a href="#">137591062</a> <a href="#">view</a>   <a href="#">print</a></p> <p>Taxable: ✗      External Note to Suppliers: <i>no value</i></p> <p>Commodity Code: 80161801 / Photocopier rental or leasing service      Attachments for supplier: <a href="#">Add</a></p> <p>Service End Date (mm/dd/yyyy): 08/31/2021      Internal Note: <i>no value</i></p> <p><b>Amount Only</b> <input checked="" type="checkbox"/></p> <p>Service Start Date (mm/dd/yyyy): 12/01/2020</p>							

**\*\*\*Reminder quantity cannot be greater than (1) and Amount Only box must be checked.\*\*\***

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# Adding Account & SpeedChart

- Account codes and SpeedChart entered at the **Header Level** will default to all lines
- Both lines are considered Office/Computer Supplies by adding at **Header Level**.

Accounting Codes											
Account	Speed Chart	GL Unit	Fund	Department	Cost Center	Function	Program	PC Business Unit	Project-Activity	Project2	Project3
63003	DSM013	UTSA1	3105	ASC008	DSM013	100	no value	no value	no value	no value	no value
Office/Computer Supplies	DEPT OF BIOLOGY OPS INSTR		DES Designated Tuition	COS BIOLOGY	DEPT OF BIOLOGY OPS INSTR	Instruction					

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	✓ Clorox(R) Disinfecting Wipes, 7 x 8, Fresh Scent, 75 Wipes Per Tub, Box Of 6 Tubs	536373	CT	38.13	Qty: 1 CT	38.13
ITEM DETAILS						
Manufacturer Name	THE CLOROX COMPANY	Contract:	no value	Requisition Number	144827935 view   print	
Manufacturer Part Number	10044600159499	Taxable	×	External Note to Suppliers	no value	
Supplier Part Auxiliary ID	536373	Commodity Code	47131502 / Cleaning cloths or wipes	Attachments for supplier	Add	
more info...		Service End Date (mm/dd/yyyy)	no value	Internal Note	no value	
		Amount Only	×			
		Service Start Date (mm/dd/yyyy)	no value			
2	✓ Paper Mate Gel Pen, Profile Retractable Pen, 0.7mm, Black, 36 Count	8012081	PK	17.47	Qty: 1 PK	17.47
ITEM DETAILS						
Manufacturer Name	NEWELL BRANDS INC.	Contract:	no value	Requisition Number	144827935 view   print	
Manufacturer Part Number	2095473	Taxable	×	External Note to Suppliers	no value	
Supplier Part Auxiliary ID	8012081	Commodity Code	44121701 / Rollerball pens	Attachments for supplier	Add	
more info...		Service End Date (mm/dd/yyyy)	no value	Internal Note	no value	

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# Adding Account & SpeedChart

- If multiple Account codes are used, add at **Line Level**
- If **items are different** Account codes should be different. **Do not** add different Account Codes at the **Header Level** instead update at the **Line Level**
- Snapshot shows examples of different **descriptions** of line items.

Purchase Order : PO0095956 Revision 0

Status Summary Revisions 1 Confirmations Shipments Receipts Vouchers Comments Attachments 5 History

Accounting Codes

Values vary by line.

Account	Speed Chart	GL Unit	Fund	Department	Cost Center	Function	Program	PC Business Unit	Project-Activity	Project2	Project3
63001 Consumable Non-Office Supplies	EGEL03 MECHANICAL ENGINEERING LAB FEE	UTSA1	2100 ESG General Funds	AEN004 COE MECHANICAL ENGINEERING	EGEL03 MECHANICAL ENGINEERING LAB FEE	100 Instruction	no value	no value	no value	no value	no value

2 Items

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 ✓	RS 200 micrometer inch adjust assy	MMP200-0204 55	EA	304.72	Qty: 3 EA	914.16
2 ✓	Freight		EA	75.00	Qty: 1 EA	75.00

ACCOUNTING CODES

Values have been overridden for this line

Account	Speed Chart	GL Unit	Fund	Department	Cost Center	Function	Program	PC Business Unit	Project-Activity	Project2	Project3
60373 Freight Delivery Services	EGEL03 MECHANICAL ENGINEERING LAB FEE	UTSA1	2100 ESG General Funds	AEN004 COE MECHANICAL ENGINEERING	EGEL03 MECHANICAL ENGINEERING LAB FEE	100 Instruction	no value	no value	no value	no value	no value

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# Adding Account & SpeedChart

- If purchase is split between **2 or more Cost Centers and/or Projects**, and any lines have a zero (0) dollar value **do not** add split at the **Header Level** instead update at the **Line Level**.
- Zero (0) cannot be split, thus PeopleSoft does not recognize the value and funds will not encumber until corrected.

**2 Oxygen** Cylinder 15.00 2 Cylinder 45.00

ITEM DETAILS

Contract: no value Internal Note: no value  
 Taxable: X Internal Attachments: Add  
 Commodity Code: 12141904 / Oxygen O  
 Service Start Date (mm/dd/yyyy): no value  
 Service End Date (mm/dd/yyyy): no value  
 Amount Only: X

CODES ADDED HERE WILL BE APPLIED TO ALL LINES

Account	Speed Chart	GL Unit	Fund	Department	Cost Center	Function	Program	PC Business Unit	Project-Activity	Project2	Project3	Amount of Price
63005 Chemicals & Gases	DXM039 PURCH-DISTR SERV OPS INST	UTSA1	0105 DES Designated Tuition	BAA004 PURCHASING DEPARTMENT	DXM039 PURCH-DISTR SERV OPS INST	700 Institutional Support	no value	no value	no value	no value	no value	30.00 USD
63005 Chemicals & Gases	DRM009 OPC RESRCH INTEGRITY COMP OPS	UTSA1	0105 DES Designated Tuition	RES004 RESEARCH INTEGRITY	DRM009 OPC RESRCH INTEGRITY COMP OPS	700 Institutional Support	no value	no value	no value	no value	no value	15.00 USD

**3 Shipping** Each 5.00 1 Each 5.00

ITEM DETAILS

Contract: no value Internal Note: no value  
 Taxable: X Internal Attachments: Add  
 Commodity Code: 78121609 / Freight fee  
 Service Start Date (mm/dd/yyyy): no value  
 Service End Date (mm/dd/yyyy): no value  
 Amount Only: ✓

CODES ADDED HERE WILL BE APPLIED TO ALL LINES

Account	Speed Chart	GL Unit	Fund	Department	Cost Center	Function	Program	PC Business Unit	Project-Activity	Project2	Project3	Amount of Price
60373 Freight Delivery Services	DXM039 PURCH-DISTR SERV OPS INST	UTSA1	0105 DES Designated Tuition	BAA004 PURCHASING DEPARTMENT	DXM039 PURCH-DISTR SERV OPS INST	700 Institutional Support	no value	no value	no value	no value	no value	5.00 USD

# 6 Document Search

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.

The screenshot displays the Rowdy Exchange web application. At the top, there is a search bar with the text "Search (Alt+Q)" and a magnifying glass icon. Below the search bar, the page title is "Search All Orders". On the left side, there is a sidebar with a "Supplier" filter menu showing a list of suppliers and their document counts: POSSIBLE MISSIONS, INC. (1963), TODAY'S BUSINESS SOLUTIONS, LLC (848), BURGOON CO. (724), Summus Industries, Inc. (VWR) (578), HIED INC (524), and a "Department" filter menu with options like FACILITIES BUSINESS OPERATIONS (BFC004) (2019), COS BIOLOGY (ASC008) (1492), COLLEGE OF SCIENCE-DEAN (ASC001) (1815), COS CHEMISTRY (CTR042) (580), and COE BIOMED ENG CHEM ENG (AEN004) (510). The main content area shows a table of search results with columns for Order Identifier, Type, Order Status, Order Owners, Created Date/Time, Completed Date, Supplier, and Total Amount. The table lists several orders, including receipts, requisitions, and purchase orders, with their respective statuses (Pending, Complete) and amounts.

Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount
RC-0041799	Receipt	-		6/4/2021 2:17:15 PM	6/4/2021 2:17:20 PM	MCMaster-CARR SUPPLY COMPANY	0.00 USD
144688307	Requisition	Pending		6/4/2021 2:16:03 PM	-	USA SCIENTIFIC INCORPORATED	585.20 USD
R0027199	Voucher	Complete		6/4/2021 2:09:44 PM	6/4/2021 2:10:53 PM	TODAY'S BUSINESS SOLUTIONS, LLC	1.99 USD
R0027198	Voucher	Complete		6/4/2021 1:56:04 PM	6/4/2021 1:56:41 PM	TODAY'S BUSINESS SOLUTIONS, LLC	135.75 USD
PO0096078	Purchase Order	Complete		6/4/2021 1:49:25 PM	6/4/2021 1:50:08 PM	POSSIBLE MISSIONS, INC.	87.28 USD
PO0096077	Purchase Order	Complete		6/4/2021 1:48:20 PM	6/4/2021 1:48:49 PM	POSSIBLE MISSIONS, INC.	195.00 USD
PO0096076	Purchase Order	Complete		6/4/2021 1:46:23 PM	6/4/2021 1:47:17 PM	GENSCRIPT CORP	679.93 USD

## 6 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 Non-Catalog Purchase Order
- **DO NOT submit a POC request**
  - ✗ **To add products to a Punch-out order; instead create a new requisition**
  - ✗ **If payment has been made against the PO**
  - ✗ **To cancel lines on Punch-out order; instead send an email to [Purchasing@utsa.edu](mailto:Purchasing@utsa.edu) to determine the best resolution.**



6

## PO Change Order (POC) (Cont.)

solutions.sciquest.com/apps/Router/FavoritesFormEdit?&FavoriteProductId=4456300&wantReloadOnClose=4456300&FavPageContext=2&tmstmp=...

**Purchase Order Change Request** Available Actions: Add and go to Cart

### PO Change Request Instructions



## PO CHANGE REQUEST

Use this form to request a change to a Purchase Order from a Non-Catalog Item(s) that has already been sent to the vendor.

In order to ensure proper handling of your request, you must do the following:

- Complete Change Order Form as needed & indicated on the form.
- Please be specific with the change order description. Complete this form by providing as much detail as possible regarding the requested change.
- List the correct PO number in the correct field.
- Please be sure to complete the form correctly regarding total dollar change order amount.

**A. Non-Conforming Purchase Order:** Executive approval is required for Non-Conforming Purchase Order Correction requests. A Non-Conforming Purchase Order Change ("POC") is a POC made solely for the purpose of causing the purchase order to match the invoice. If the requested POC results in one of the following circumstances, the POC is non-conforming and requires executive approval:

- (i) An increase in contract pricing without additional equivalent benefits provided by the vendor to UTSA; or
- (ii) A modification to the specific contracted goods/services without documented UTSA approval of the modification prior to receipt of the goods/services.

**B. Other Purchase Order Corrections:** Purchase Order corrections resulting in increasing or decreasing of unit quantity, addition or modification of line item description, and/or cancellation of an order are not considered non-conforming. Purchase Order changes must be completed before an invoice is submitted for payment. Exceptions to these processes will be handled on case-by-case.

### PO Change Request Details

Please complete the fields below to describe the nature of this PO Change Request. Provide as much information as possible on this form to avoid delays in processing. Fields in **bold** are required.

**PO Number**  
Enter Supplier

or  
[Supplier Search](#) | [Enter Manually](#)

**Change Type**  
Please select...

**Current PO Amount (Before POC)**

**Increase Amount (Enter Zero if No Increase)**

Decrease Amount

**New PO Amount (After POC)**

**Commodity Code**

**Commodity code used on PO being updated**

Please describe the required PO change as well as justification for the change. Be specific in order to avoid any delays in processing. If there are changes to one or more lines on the PO, please include the line number and associated change for each.

**PO Change Request Details**

**PO Change Request Detail must include all details needed for the change. Purchasing will need this information to correctly update your PO.**

Must include details including "New Funding Source", i.e. DXM003 to AX0033

1025 characters remaining

Internal Attachments

# Close or Cancel

- PO's with activity – receipts, invoices, vouchers should be closed - Please send an email to close PO's to [Purchasing@utsa.edu](mailto:Purchasing@utsa.edu). Once closed PO history of payments and receiving reports will still be available to view
- PO's with no activity – not sent to vendor, wrong vendor ID, no receipts, no invoices, no vouchers can be cancelled - Please process a PO Change request form in Rowdy Exchange to cancel PO's. Once cancelled PO will be removed from the history of UTShare and will no longer be available.
- Both Cancel and Closing will disencumber funds.

# Receiving

Receiving Reports are **important** and **required** on certain purchases. If the codes listed below are used, payment will not process without a receiving report. Entering a receipt is **required** for orders funded with **State or Federal Funds or Capital and Control Assets or purchases more than \$4,999.99 (excluding Amount Only items)**

Listed are Fund Codes, Account Codes and Descriptions that will require a receipt.

**Note this is a partial list of codes. For additional Account Codes use link <https://www.utsa.edu/financialaffairs/accounting/docs/Expense>**

## Receiving (Cont.)

**Example: State Fund codes: 21xx** (Any fund code starting with 21)

Accounting Codes  ... 

 Values vary by line.

Account	Speed Chart	GL Unit	Fund	Department	Cost Center	Function	Program	PC Business Unit	Project-Activity	Project2	Project3
			2100 E&G General Funds								

**Example: Fund Codes: 5100-5499** (Federal, state, local and private grants, contracts and agreements)

Accounting Codes  ... 

Account	Speed Chart	GL Unit	Fund	Department	Cost Center	Function	Program	PC Business Unit	Project-Activity	Project2	Project3
			5200 RES State Sponsored Programs								

# Receiving (Cont.)

## Capitalized Purchases

86110	\$5,000 or more	Furniture & Equipment
86120	\$5,000 or more	Computer Equipment
88210	\$100,000 or more	Computer Software
86115	\$5,000 or more	Telecommunication Equipment
86401	\$5,000 or more	All Artwork, Collections, Museum Artifacts
86201	\$5,000 or more	Motor Vehicles: Passenger Cars
86202	\$5,000 or more	Motor Vehicles: Truck, Van, Bus, Unmanned Aerial Vehicle (UAV): Drones

# Receiving (Cont.)

## Example: Capitalized items:

Accounting Codes   

Account	Speed Chart	GL Unit	Fund	Department	Cost Center	Function	Program	PC Business Unit	Project-Activity	Project2	Project3	Amount of Price
86110 Furnishings & Equip Capitaliz												327,000.00 USD

## Receiving (Cont.)

### Controlled Purchases

63161	Any Amount	Hand Guns, Rifles, Shotguns
63162	\$500-\$4,999.99	TVs, Projectors, Cameras, Camcorders, Video Recorders/Players, Sound Systems, Unmanned Aerial Vehicle (UAV): Drones
63163	\$500-\$4,999.99	Desktop/Laptop Computers, Tablets and Smartphones
63004	Any Amount	Food for Research
63005	Any Amount	Chemicals & Gases
63203	Any Amount	Animals

## Receiving (Cont.)

**Example: Controlled items: (\$500 to \$4,999.99 )** Cameras, Camcorders, Video Recorders/Players, Sound Systems, TVs, Projectors, Unmanned Aerial Vehicle (UAV): Drones, Desktop/Laptop Computers, Tablets and Smartphones

Accounting Codes ✎ ... ▾

Values vary by line.

Account	Speed Chart	GL Unit	Fund	Department	Cost Center	Function	Program	PC Business Unit	Project-Activity	Project2	Project3
63162 Furnishings & Equip Controlled							no value	no value	no value	no value	no value

## Receiving (Cont.)

**Example: Controlled items (at any cost):** Guns (handguns, rifles, automatic weapons, shotguns), Artwork, Specified Lasers, Encryption Technology, Sensors, Propulsion Systems, Infectious Agents, Food for Research, Toxins, Chemicals & Gases, Animals and Certain Materials for the Manufacture of Controlled Goods

Accounting Codes											
Account	Speed Chart	GL Unit	Fund	Department	Cost Center	Function	Program	PC Business Unit	Project-Activity	Project2	Project3
63005 Chemicals & Gases							no value	no value	no value	no value	no value

## Receiving (Cont.)

To receive select “Receipts” from top menu options

**Purchase Order** : PO00 [REDACTED] Revision 0

Status Summary Revisions 1 Confirmations 1 Shipments Receipts Vouchers Comments Attachments History

General Information	Shipping Information	Billing/Payment
PO/Reference No. PO00 [REDACTED]	Ship To	Bill To
Revision No. 0	The University of Texas at San Antonio	UTSA
Supplier Name HUP POSSIBLE MISSIONS, INC.	One UTSA Circle	Disbursements and Travel Services
	Central Receiving	One UTSA Circle
	San Antonio, TX 78249	San Antonio, TX 78249
	United States	United States

Click on “+” sign

**Purchase Order** : PO00 [REDACTED] Revision 0

Status Summary Revisions 1 Confirmations 1 Shipments Receipts Vouchers Comments Attachments History

Records found: 0 +

*There are no receipts for this PO.*

# Receiving (Cont.)

Rowdy Exchange

Accounts Payable > Receipts > Search For Receipts > Summary - Receipt 29248814

Receipt Create Date: 6/4/2021 2:34:17 PM  
 Source: Manual

Buttons: Delete Add PO Save Updates **Complete**

Summary Comments (0) History

Exact Match: PO No. PO0096044

**Header Information**

Receipt Name: 2021-06-04 6001019173 01

Receipt No	Receipt Date	Packing Slip No.	Supplier Name	Received by
To Be Assigned	6/4/2021 <small>mm/dd/yyyy</small>		STATE UNIVERSITY OF IOWA	

RECEIPT ADDRESS

Location: The University of Texas at San Antonio  
 One UTSA Circle  
 Central Receiving  
 San Antonio, TX 78249  
 United States

CARRIER

Carrier: Other  
 Tracking No.:  
 Attachments:  
 Notes (1,000 Chars. Max):

**DELIVERY**

Buttons: Attach/Link

**Receipt Lines**

Line Details

Show Receipt Details For Selected Lines: Remove Selected Items Go

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
PO0096044	1	TROMA-IProduct Form: Concentrate 0.1 ml		1 EA		1		<b>Do not update the Line Status</b>	Remove Line Receive & Return
PO0096044	2	Estimated Shipping		1 EA		1			Remove Line Receive & Return

Buttons: Delete Add PO Save Updates **Complete**

# Receiving (Cont.)

**For Partial Receiving: Check item not received. Click “Go” (Remove Selected Items)**

Summary | Comments (0) | History

Exact Match: PO No. P0007937

Header Information

Receipt Name: Requester

Receipt No	Receipt Date	Packing Slip No.	Supplier Name	Received by
To Be Assigned	1/23/2020 mm/dd/yyyy		HIED INC	Elizabeth Raymond

RECEIPT ADDRESS

Location: The University of Texas at San Antonio  
 One UTSA Circle  
 Central Receiving  
 San Antonio, TX 78249  
 United States

DELIVERY

Carrier: Other

Tracking No.

Attachments

Notes (1,000 Chars. Max)

Receipt Lines

Line Details

Show Receipt Details

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
P0007937	1	1781208Dell OptiPlex 3070 Micro	2 EA	2				Received	Remove Line Receive & Return
P0007937	2	1758015Dell Dell 23 Monitor - P2319HAdvanced Exchange Service, 5 Years	3 EA	3				Received	Remove Line Receive & Return

For Selected Lines: Remove Selected Items **Go**

Delete | Add PO | Save Updates | Complete

Summary | Comments (0) | History

Header Information

Receipt Name: Requester

Receipt No	Receipt Date	Packing Slip No.	Supplier Name	Received by
To Be Assigned	1/23/20 mm/dd/yyyy		HIED INC	Elizabeth Raymond

RECEIPT ADDRESS

Location: The University of Texas at San Antonio  
 One UTSA Circle  
 Central Receiving  
 San Antonio, TX 78249  
 United States

DELIVERY

Carrier: Other

Tracking No.

Attachments

Notes (1,000 Chars. Max)

Receipt Lines

Line Details

Show Receipt Details

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
P0007937	2	1758015Dell Dell 23 Monitor - P2319HAdvanced Exchange Service, 5 Years	3 EA	3				Received	Remove Line Receive & Return

For Selected Lines: Remove Selected Items **Go**

Delete | Add PO | Save Updates | Complete

**Complete Receiving Report by clicking “Complete”**

# 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](mailto: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/>

# Questions



*Thank you for attending class*

**Please complete the electronic evaluation form**

**Go to:**

**<https://mytraining.utsa.edu/apps/evaluations>**

- Click 'Load classes' (orange tab)
- Click the name of the class you took today
- Click 'Start Evaluation'
- Click 'Give Feedback'
- IMPORTANT '1' is LOW and '7' is HIGH



**Please add your comments in the open comment box at the end**