

Important!

You must check-in to receive credit in your training history

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!



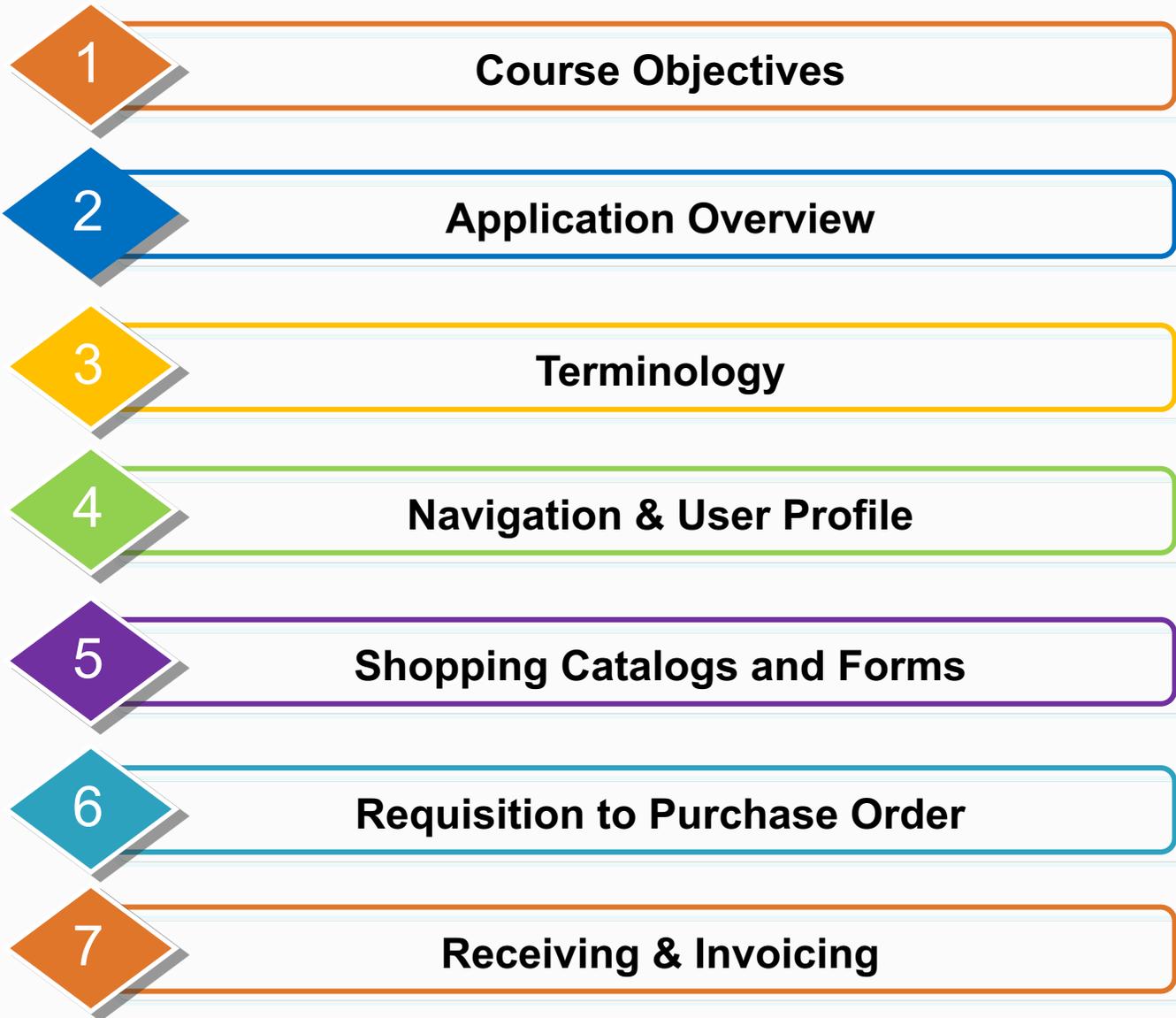
Rowdy Exchange Requester Training

CT0990





Poll before
we get
started



Course Objectives

- Understand the purchase process in Rowdy Exchange:
 - Processes and terminology
 - Shopping and requisition overview
 - Purchasing forms
- 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 enter a receipt (Receiving Report)



Application Overview



Procure-To-Pay Process





Purchasing Terminology



Terminology

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

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.

Requester – Can shop and submit the cart for approval.

Assignee – The assignee must be a requester in order to 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.



Navigation & User Profile

Update User Profile Defaults



Time for a Poll



General Navigation

Easy Slide-Out Menu and Breadcrumb Navigation

The upper menu banner provides easy access to:

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

Message board for news

The screenshot displays the RowdyExchange web application interface. On the left is a dark blue slide-out menu with icons and labels for Home, Shop, Documents, Contracts, Accounts Payable, Suppliers, Sourcing, Reporting, Administrator, and Setup. The main content area features a breadcrumb trail: Shop > Shopping Dashboard. Below this is an 'Organization Message' banner with a blue header and a white body containing a welcome message and several bullet points: 'Purchasing TIP - Early submission of a funded requisition will help expedite procurements.', 'STAPLES has been added to the catalog showcase for Office Supplies.', 'HIED has been added to the catalog showcase for Apple Products.', 'Coordinate Copy Machine and Multi-Function Device renewals or new leases through Purchasing.', and 'Remember to keep your Airgas cylinder rental payments up to date.' Below the message board are two side-by-side panels: 'Shop' with a search bar and filters, and 'My Draft Carts' with a dropdown menu and a 'No results found' message. The top navigation bar includes 'Purchase Orders', a search field, '0.00 USD', and icons for notifications and user profile.

View My Profile

Search (Alt+Q) 12.50 USD

Requester Name

View My Profile

Dashboards

Manage Searches

Manage Search Exports

Set My Home Page

Search Help For A Solution

You do not have any recent orders

Logout Help

Rowdy Exchange

My Profile > User's Name, Phone Number, Email, etc.

Requester Name

User Profile and Preferences

User's Name, Phone Number, Email, etc.

Language, Time Zone and Display Settings

App Activation Codes

Early Access Participation

Update Security Settings

Default User Settings

User Roles and Access

Ordering and Approval Settings

Permission Settings

Notification Preferences

User History

User Profile and Preferences

User's Name, Phone Number, Email, etc.

Language, Time Zone and Display Settings

App Activation Codes

Early Access Participation

Update Security Settings

Default User Settings

Custom Field and Chartfield Defaults

Default Addresses

Cart Assignees

Payment Options (DO NOT USE - PCARD BUYING IS NOT INCLUDED IN THE ROWDY EXCHANGE)

User Roles and Access

Ordering and Approval Settings

Default User Settings

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

Custom Field and Chartfield Defaults

Header (int.) | Header (ext.) | **Codes** | Code Favorites | Internal Information

Custom Field Name	Default Value	Description	Edit Values
Purchasing Business Unit	UTSA1	UTSA	Edit
Next Fiscal Year	No Default Value		Edit
Procurement Specialist	Unassigned	Unassigned	Edit
TIBH Exception	No Default Value		Edit
Purchasing Review Required	No Default Value		Edit
Contract Start Date (mm/dd/yyyy)	No Default Value		Edit
Contract End Date (mm/dd/yyyy)	No Default Value		Edit
Delivery Location	CR10112M	Central Rcv & Wrhs 1.01.12M	Edit

Entering Speed Chart Values

1. Click on **Create New Value**
2. Search for the desired **Speed Chart (cost center)** value

The screenshot displays the 'Custom Field and Chartfield Defaults' window. At the top, there are tabs for 'Header (int.)', 'Header (ext.)', 'Codes', 'Code Favorites', and 'Internal Information'. Below these is a table with columns: 'Custom Field Name', 'Default Value', 'Description', and 'Edit Values'. The 'Speed Chart' row is highlighted in yellow, with 'No Default Value' in the 'Default Value' column and an 'Edit' button in the 'Edit Values' column. Below the table, there is an 'Edit Values' section with a 'Create New Value' button (indicated by arrow 1) and a 'Close' button. To the right, a 'Search For Value' dialog is open (indicated by arrow 2), showing 'Field Name' as 'Speed Chart', empty 'Value' and 'Description' fields, and 'Results Per Page' set to 5. A 'Search' button is at the bottom of the dialog. A blue bracket on the right side of the dialog is also indicated by arrow 2. At the bottom left of the window, there is a note: '* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.'

Speed Chart (continued)

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

The image displays two screenshots of the 'Custom Field and Chartfield Defaults' interface, illustrating the steps for selecting and setting a default value for a custom field.

Top Screenshot: Shows the 'Custom Field and Chartfield Defaults' window for 'Speed Chart'. The 'Default Value' is 'No Default Value'. A list of values is displayed, with 'DZF002' selected. The 'Add Values' button is highlighted with a red box. Arrows labeled '3' and '4' point to the selection and the 'Add Values' button, respectively.

Value	Description
DAX122	DEFINE PEOPLESOFT SUPPORT
DXM062	PEOPLESOFT CONTRACTUL SVC-INST
<input checked="" type="checkbox"/> DZF002	PEOPLESOFT SUPP & SUST CTR OPS
<input type="checkbox"/> DZF003	PEOPLESOFT SUPP & SUST CTR OPS
<input type="checkbox"/> DZZ002	PEOPLESOFT SUPPORT & SUSTAINMT

Bottom Screenshot: Shows the 'Edit Existing Value' form for 'DXM033'. The 'Default' checkbox is checked and highlighted with a red circle. An arrow labeled '5' points to this checkbox.

Value	Description
DXM033	PURCH DISTR SERV OPS INST

Edit Existing Value Form:

Value	DXM033
Description	PURCH DISTR SERV O
Default	<input checked="" type="checkbox"/>
Status	active



Catalogs, Non-catalogs & Procurement Forms



SHOPPER

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' menu item is highlighted. The main content area features an 'Organization Message' section with a welcome message and a list of purchasing tips. Below this, there are two panels: 'Shop' and 'My Draft Carts'. The 'Shop' panel includes search filters for 'Simple', 'Advanced', and 'Non-Catalog Item' (which is highlighted with a red box). A search bar is present with the placeholder text 'Search for products, suppliers, forms, part number, etc.'. The 'My Draft Carts' panel shows a dropdown menu for 'All Drafts' and a message stating 'No results found'.

RowdyExchange

Purchase Orders Search (Alt+Q) 0.00 USD

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 displays the 'Catalog & Form Showcases' page for UTSA. It features a navigation menu on the left and a main content area with several categories of suppliers and forms. The categories and their contents are as follows:

- UTSA:** A single tile for 'UTSA General Stores'.
- Office Supplies:** A grid of two tiles: 'STAPLES Summit Industries (H&E)' and 'TODAY'S OFFICE Punchout (L2)'. Both are highlighted with a red box.
- Technology:** A grid of four tiles: 'DELL EMC Summit (H&E)', 'shi', 'DELL Summit (H&E)', and 'Apple Products'. All four are highlighted with a red box.
- Science and Research - Equipment and Tools:** A grid of six tiles: 'Agilent', 'BIO-RAD', 'CAROLINA', 'CML Micro', 'M', and 'Parker Scientific Possible Mixators (H&E)'. The 'Parker Scientific' and 'VWR Summit VWR' tiles are highlighted with red boxes.
- MIRO / Facilities:** A grid of one tile: 'GRAINGER Suppon (H&E)'. It is highlighted with a red box.
- Procurement Forms:** A grid of four tiles: 'After The Fact', 'Copy Machine Form (Central)', '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' selected and highlighted by 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 stating 'No results found'.

Non-Catalog Navigation Continued

Add Non-Catalog Item ✕

Existing Supplier

Select Supplier

Item ⌵

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

Additional Details ⌵

Commodity Code

Product Flags

- Controlled substance
- Recycled
- Hazardous material

★ Required fields

Unable to Locate a Non-Catalog Vendor

UTSA PaymentWorks

How to Navigate to PaymentWorks Initiator Role Navigation:
Log in to UTShare/PeopleSoft and click on UTSA Business Solutions Center tile



Initiator Role – Job Aid

Vendor must complete Supplier Registration through PaymentWorks



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



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 UNSPSC codes are required on requisition lines and defaulted with catalog items.

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	... <input type="checkbox"/>
^ 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	... <input type="checkbox"/>
^ 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		
		Amount Only:	×				
		Service Start Date:	no value				

Adding Account & SpeedChart

- 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**

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 E&G 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 E&G General Funds	AEN004 COE MECHANICAL ENGINEERING	EGEL03 MECHANICAL ENGINEERING LAB FEE	100 Instruction	no value	no value	no value	no value	no value

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 view print			
Taxable	✗	External Note to Suppliers	no value			
Commodity Code	78121603 / Freight fee	Attachments for supplier	Add			
Service End Date (mm/dd/yyyy)	no value	Internal Note	no value			
Amount Only	✓					
Service Start Date (mm/dd/yyyy)	no value					

Entering Freight and Discounts

Freight charges entered as a Non-Catalog item



3	Shipping	Each	5.00	1 Each	5.00	...	<input type="checkbox"/>
ITEM DETAILS							
Contract:		Select price or contract...		Internal Note		<input type="text"/>	
Taxable		<input type="checkbox"/>		1000 characters remaining		expand clear	
Commodity Code		78121603		<input type="text"/>		<input type="text"/>	
Amount Only		<input checked="" type="checkbox"/>					

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



1	Pens at \$1.50 per pack less discount of .25 cent per pack	Pack	1.25	3 Pack	3.75	...	<input type="checkbox"/>
ITEM DETAILS							
Contract:		Select price or contract...		Internal Note		<input type="text"/>	
Taxable		<input type="checkbox"/>		1000 characters remaining		expand clear	
Commodity Code		60121524		<input type="text"/>		<input type="text"/>	
Amount Only		<input type="checkbox"/>					

Modify/Update Requisition

Accounting Codes ...

Codes Added Here Will Be Applied to All Lines

i Values vary by line [Copy to other lines](#)

Account	Speed Chart	GL Unit	Fund	Department	Cost Center	Function	Program	PC Business Unit	Project-Activity	Project2	Project3
63003 Office/Computer Supplies	DXM033 PURCH DISTR SERV OPS INST	UTSA1	3105 DES Designated Tuition	BAA004 PURCHASING DEPARTMENT	DXM033 PURCH DISTR SERV OPS INST	700 Institutional Support	no value	no value	no value	no value	no value

Internal Notes and Attachments ...

Internal UTSA Notes	no value
Internal Attachments	Add

External Notes and Attachments ...

Note to all Suppliers	no value
Attachments for all suppliers	Add

Submit a Requisition

Rowdy Exchange | All | Search (Alt+Q) | 14.00 USD

Requisition : 144764889

Summary | PO Preview | Comments | Attachments | History

General

Card Name: Pens
Description: no value
Prepared by: Elizabeth Raymond
Department: PURCHASING DEPARTMENT (BAA004)
Prepared for: Elizabeth Raymond
PO Clauses: [Edit](#) | [View details](#)
Purchasing Business Unit: UTSA1
Next Fiscal Year:
Purchasing Review Required:
COVID-19 Related Purchase:

Shipping

Ship To: The University of Texas at San Antonio
501 W Cesar E. Chavez Blvd
Durango Bldg - Central Receiving
San Antonio, TX 78207
United States
Ship Via: Best Carrier-Best Way
Requested Delivery Date: no value

Billing

Bill To: UTSA
Disbursements and Travel Services
One UTSA Circle
San Antonio, TX 78249
United States

Total (14.00 USD)
Subtotal: 14.00
14.00

[Submit Requisition](#)
[Assign Cart](#)

What's next for my order?

Next Step: Wait for initial PR Validation
Approvers: There are no approvers

Workflow: Show skipped steps

- Draft** (Active) - Elizabeth Raymond
- Parallel Steps (Click to view)
- Cost Center Approval (Future)
- Purchasing Review (Future)

Approval Workflow

Workflow driven by method of finance (Accounts/SpeedChart) and Commodity Codes; can be previewed at any time during approval process

The screenshot displays the Rowdy Exchange interface for a requisition with ID 144764889. The page is divided into several sections: General, Shipping, Billing, and a Workflow sidebar. The General section includes fields for Cart Name (Pens), Description (no value), Prepared by, Department (PURCHASING DEPARTMENT (BAA004)), and Department Contact Information. The Shipping section shows Ship To (The University of Texas at San Antonio) and Ship Via (Best Carrier-Best Way). The Billing section shows Bill To (UTSA). The Workflow sidebar, highlighted with a red box, shows a sequence of steps: Draft (Active, Elizabeth Raymond), EAJ is Under \$15K (Skipped), Parallel Steps (Click to view), Cost Center Approval (Future), Cost Center Catch-All (Skipped), and Capital Projects Approval (Future). The Cost Center Approval step is expanded to show details for Cost Center: DXM033 (PURCH DISTR SERV OPS INST): (All Values), listing contacts Bruce Williams, Curtis Brinson, and Ynes Alderson.

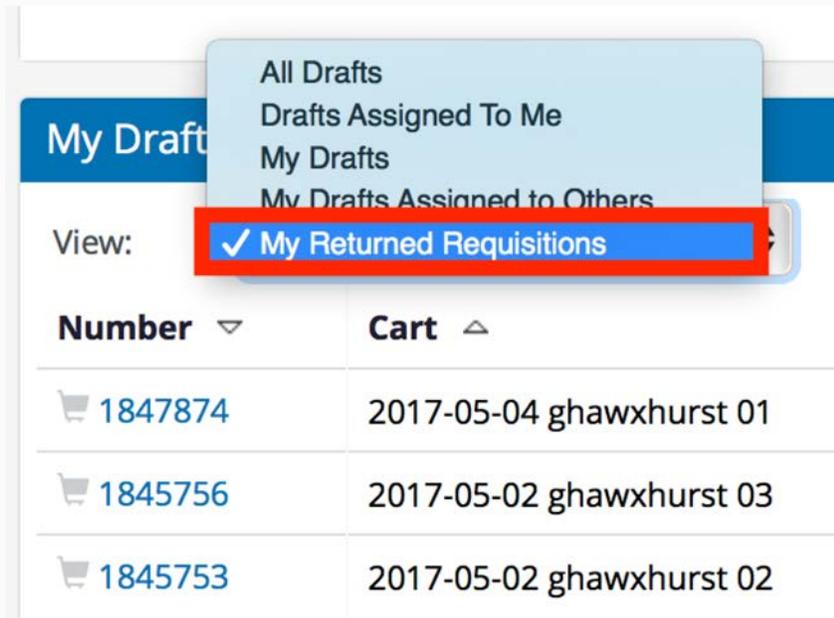
Section	Field	Value
General	Cart Name	Pens
	Description	no value
	Prepared by	
	Department	PURCHASING DEPARTMENT (BAA004)
	Prepared for	
	PO Clauses	1 Edit View details
	Purchasing Business Unit	UTSA1 UTSA
	Next Fiscal Year	×
	Purchasing Review Required	×
	COVID-19 Related Purchase	×
Department Contact Information		
Department Contact Name		
Department Contact Email		
Department Contact Phone		
Shipping	Ship To	The University of Texas at San Antonio 501 W Cesar E. Chavez Blvd Durango Bldg - Central Receiving San Antonio, TX 78207 United States
	Ship Via	Best Carrier-Best Way
Billing	Bill To	UTSA Disbursements and Travel Services One UTSA Circle San Antonio, TX 78249 United States
	Requested Delivery Date	no value

Time for a Poll



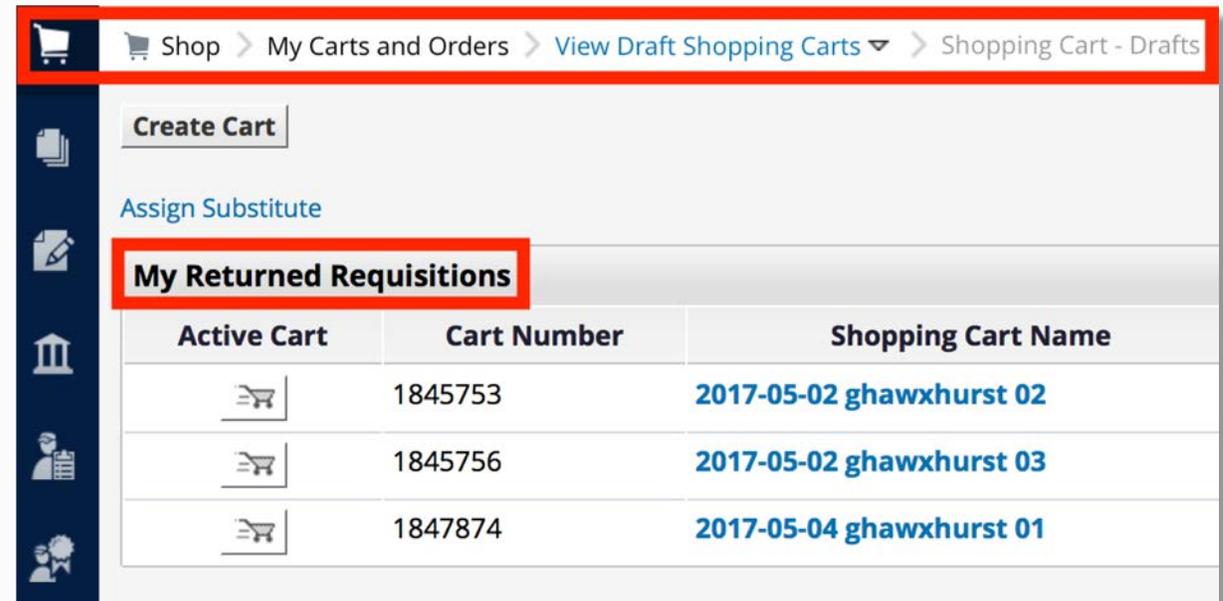
Locating a Returned Cart

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).



The screenshot shows the 'My Drafts' menu with a dropdown list. The 'View:' section has a red box around 'My Returned Requisitions', which is also highlighted in blue. Below the menu is a table of draft carts.

Number	Cart
1847874	2017-05-04 ghawxhurst 01
1845756	2017-05-02 ghawxhurst 03
1845753	2017-05-02 ghawxhurst 02



The screenshot shows the 'My Returned Requisitions' page. The breadcrumb trail at the top is highlighted in red: Shop > My Carts and Orders > View Draft Shopping Carts > Shopping Cart - Drafts. Below the breadcrumb is a 'Create Cart' button and an 'Assign Substitute' link. The main content area is titled 'My Returned Requisitions' and contains a table with three columns: Active Cart, Cart Number, and Shopping Cart Name.

Active Cart	Cart Number	Shopping Cart Name
	1845753	2017-05-02 ghawxhurst 02
	1845756	2017-05-02 ghawxhurst 03
	1847874	2017-05-04 ghawxhurst 01

Viewing Document History

To view comments or action taken against a requisition or purchase order, open the documents and click **History** to view the details.

Rowdy Exchange All ▾

Requisition ▾ : 144764889

Summary PO Preview Comments Attachments **History**

Start date End date User Filter Clear All Filters Export CSV

mm/dd/yyyy mm/dd/yyyy Action

1-12 of 12 Results 20 Per Page ▾

Line No	Date/Time ▾	User	Step(s)	Action	Field Name	From	To	Note
Line 1	6/4/2021 11:21 AM			Requisition modified	UOM	EA	PK	
Line 1	6/4/2021 11:21 AM			Requisition modified	Unit Price	0.75	1.25	Price changed automatically due to an update to Price Source:Manual
Line 1	6/4/2021 11:21 AM			Requisition modified	Product Description	Pens		Pens at \$1.50 per pack less discount of .25 cent per pack

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.

Rowdy Exchange

Documents Search All Orders

Search All Orders

Quick Filters My Searches

Supplier

- POSSIBLE MISSIONS, INC. 1963
- TODAY'S BUSINESS SOLUTIONS, LLC 848
- BURGOON CO. 724
- Summus Industries, Inc. (VWR) 578
- HIED INC 524
- See More Show More

Department

- FACILITIES BUSINESS OPERATIONS (BFC004) 2019
- COS BIOLOGY (ASC008) 1492
- COLLEGE OF SCIENCE-DEAN (ASC001) 1815
- COS CHEMISTRY (CTR042) 580
- COE BIOMED ENG CHEM ENG (AEN004) 510

Type of Order: All Created Date: Last 90 days Quick search

Page 1 of 50 1-200 of 12337 Results 200 Per Page

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

Methods for Approving a Requisition

Three (3) methods for approving:

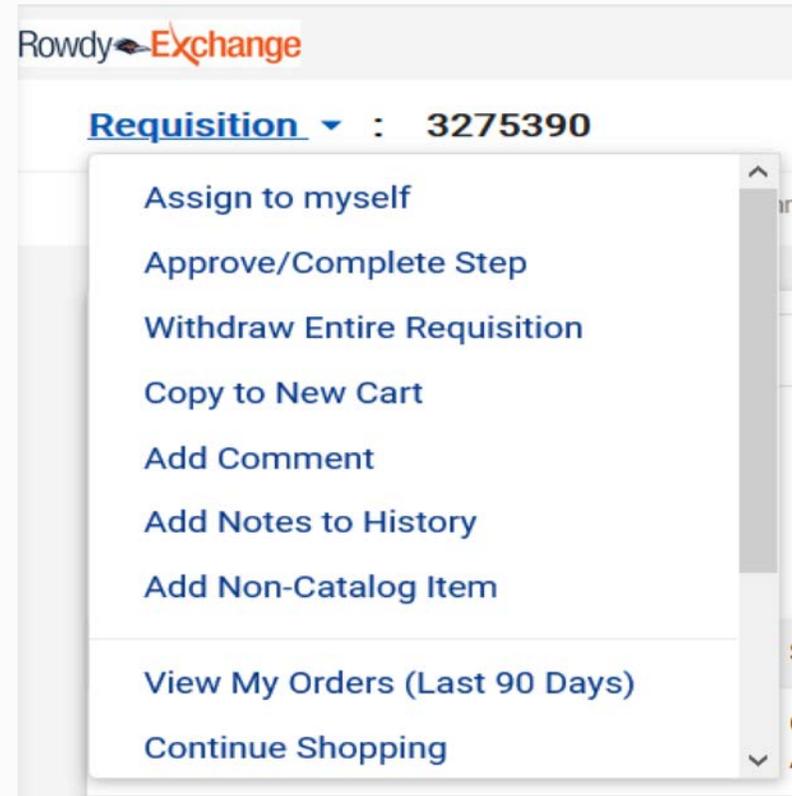
1) Online



2) Email



3) App



For Approver training go to: <http://www.utsa.edu/pds/rowdyexchange/>

Non-Catalog Manual Distribution

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**

Rowdy Exchange

Purchase Order : P00096044 Revision 0

Shipment Receipts Vouchers Comments Attachments 4 History

Shipping Information Billing/Payment

Ship To Bill To

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

UTSA
Disbursements and Travel Services
One UTSA Circle
San Antonio, TX 78249
United States

ShipTo Address Code CR10104 BillTo Address Code U21216

Delivery Options Billing Options

Ship Via Best Carrier-Best Way Payment Terms 0% 0, Net 30

Requested Delivery Date no value F.O.B. Destination

Total 85.00

Requisition Number 144815900 view | print

PO Clauses 3 Edit | View details

Purchasing Business Unit UTSA1

PO Change Order (POC)

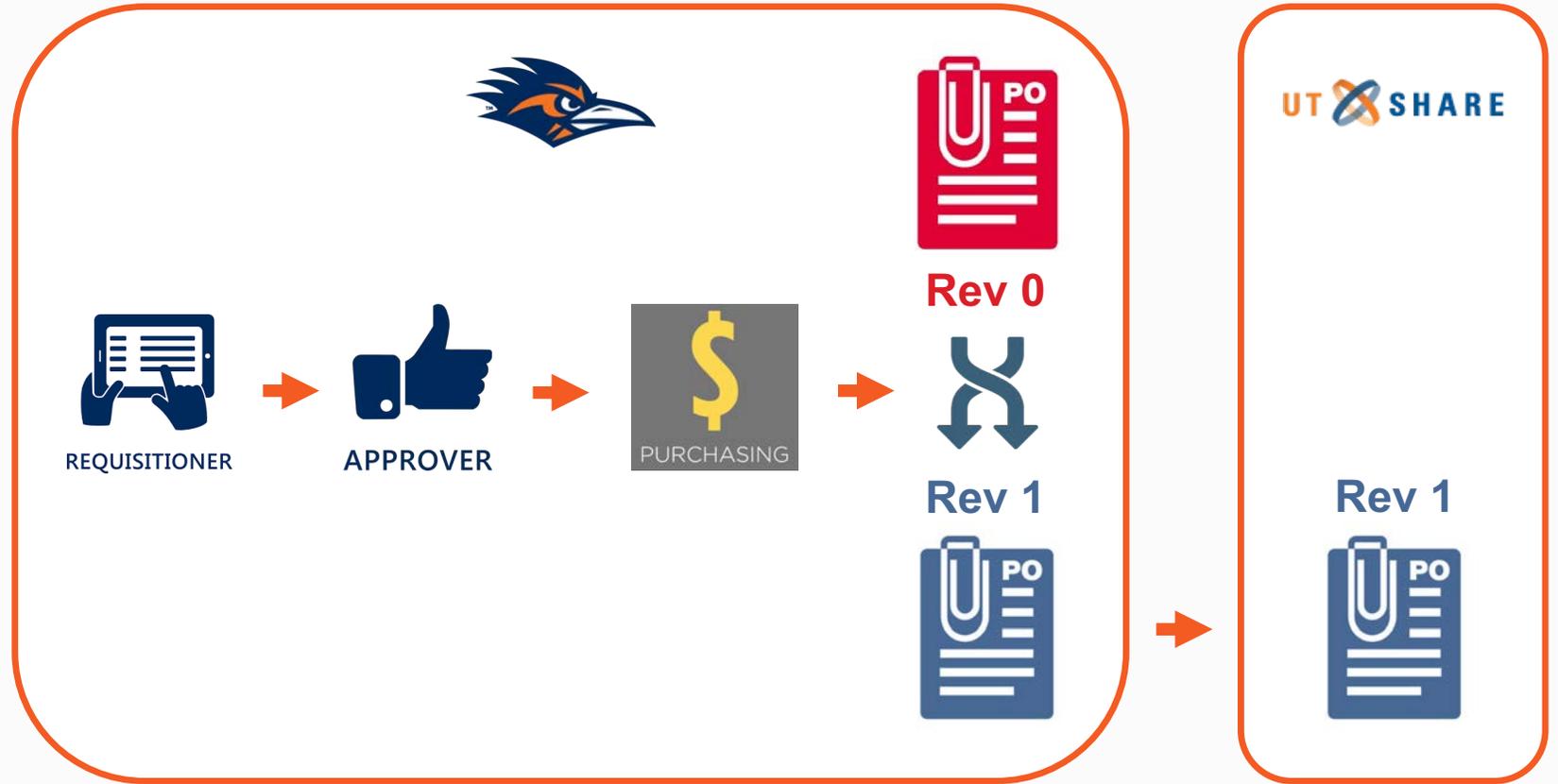
- Reasons to submit a POC request
 - ✓ To change the Account or Speed Chart (funding source)
 - ✓ To change quantity on non-catalogs orders
 - ✓ To change amount or price on non-catalog orders
 - ✓ To cancel a PO
- **DO NOT submit a POC request**
 - X To add products to a catalog order; instead create a new requisition**
 - X To cancel lines on catalog orders; instead send email to Purchasing@utsa.edu to have line or PO closed and the remaining funds disencumbered**



PO Change Order (POC) continued...

Key Points:

- ✓ Enter new total amount on the POC form for approval
- ✓ Once POC completed, buyer will approve change request; requisition will show approved



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. 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 & Invoicing



Receiving

A receipt is **required** for POs funded with State or Federal Funds, Capital and Control Assets or PO total is greater than \$4,999.99 (excluding Amount Only)

The screenshot shows the Rowdy Exchange interface for a Purchase Order (PO0096044 Revision 0). The 'Receipts' tab is selected and highlighted with a red box. Below the tabs, it displays 'Records found: 0' and a message: 'There are no receipts for this PO.' A red box highlights a plus sign icon in the top right corner of the records area.

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

Receiving

Rowdy Exchange
All ▾ Search (Alt+Q) 🔍 14.00 USD 🛒
🏠 📄 📊 ⚙️ 👤 3
Logout

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

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

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

DELIVERY

Carrier:

Tracking No.:

Attachments:

Notes:

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
PO0096044	1	TROMA-IProduct Form: Concentrate 0.1 ml		1 EA		<input type="text" value="1"/>		Do not update the Line Status	<input type="checkbox"/> Remove Line <input type="checkbox"/> Receive & Return
PO0096044	2	Estimated Shipping		1 EA		<input type="text" value="1"/>			<input type="checkbox"/> Remove Line <input type="checkbox"/> Receive & Return

Delete Add PO Save Updates Complete

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



Rowdy Exchange & UTShare Support

Additional Technical Support (Tech Café)

The Tech Café is ready for your questions!

1. Telephone: 210-458-5555
2. Email: techcafe@utsa.edu

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

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