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
Purchasing Department
Poll before we get started
Course Objectives

Application Overview

Terminology

Navigation & User Profile

Shopping Catalogs and Forms

Requisition to Purchase Order

Receiving & Invoicing
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

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

SHOPPER
REQUISITIONER
APPROVER

Purchasing Department
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
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](image)
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
Non-Catalog Items
Hosted Catalog – A supplier listed on the home page that provides product content (description, manufacturer part number, etc.).

Punch-Out Catalog

Procurement Forms
Non-Catalog Navigation
Add Non-Catalog Item

Existing Supplier
Select Supplier

Item

<table>
<thead>
<tr>
<th>Description</th>
<th>Catalog No.</th>
<th>Quantity</th>
<th>Price</th>
<th>UOM</th>
</tr>
</thead>
</table>

Each

254 characters remaining

Additional Details

Commodity Code

Product Flags:
- Controlled substance
- Recycled
- Hazardous material

Required fields:

Save  Save And Add Another  Close
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

REQUISITIONER → APPROVER → PO

Purchasing Department
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.
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**.
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!!!*
Entering Freight and Discounts

Freight charges entered as a Non-Catalog item

Enter “Net Amount” – Price less discount (negative amounts are not permitted)
Modify/Update Requisition
Submit a Requisition

Purchasing Department
Approval Workflow

Workflow driven by method of finance (Accounts/SpeedChart) and Commodity Codes; can be previewed at any time during approval process
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).
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.
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.
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
  ✗ To add products to a catalog order; instead create a new requisition
  ✗ 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

Purchasing Department
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)

**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

**Source:** Purchasing Department

### Receipt Details

<table>
<thead>
<tr>
<th>PO No.</th>
<th>PO Line No.</th>
<th>Product Name</th>
<th>Catalog No.</th>
<th>QTY/UDM Ordered</th>
<th>Previous Receipts</th>
<th>Quantity</th>
<th>Add to Inventory</th>
<th>Line Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO009044</td>
<td>1</td>
<td>TRUMA/PRODUCT FORM CONCENTRATE 0.1 ml</td>
<td>1 EA</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PO009044</td>
<td>2</td>
<td>Estimated Shipping</td>
<td>1 EA</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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

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**Catalog Orders**
Report issue by opening a SPOC ticket

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**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