

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



Easy Slide-Out Menu and Breadcrumb Navigation

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 drop-down menu
- Click **Go**
- Return to Requisitioner Reason box appears - **type in your reason**
- Click **Return to Requisitioner** button