Rowan University

Procurement Requester Guide

Rowan ProConnect

Procurement Requester Overview

How to review Carts and Place Orders, Create Change Requests, and Receive Goods and Services

As a Requisitioner you will review carts assigned to you, make the necessary adjustment or return the carts for the shopper to make the necessary adjustments, and create a requisition.

The Requisitioner must be familiar with Rowan's procurement practices and policies which apply to the requisitions they process. They must also be familiar with the department's workflow. A Requisitioner will confirm that all information in the requisition assigned to them is accurate, complete, and complies with the relevant policy and funding requirements. They will also enter the Accounting information on the requisition, such as Bank Code, Chart, Fund, Organization, Account, and Program. They should also use ProConnect to communicate with other users involved in the workflow through internal notes, history, comments, and attachments. Once they have placed the order they will continue to track the order through the approval process.

A requisitioner also has the ability to shop and create a requisition if a Shopper is not involved in the process.

This reference guide is intended to illustrate the process of creating a requisition and provide commentary.

Best Practices for Approving Carts and Placing Orders

- Ensure all information entered on the requisition is accurate and complete including appropriate vendor, item descriptions, quantities, pricing, accounting codes, and any necessary documentation.
- Monitor the requisition status to ensure it is moving through the approval process and follow up with approvers if there are any delays or issues.
- After submitting a Requisition for approval, check the status of your Requisition from any screen, by clicking on the Orders icon and browsing to My Orders > My Requisitions.
- Return Requisitions to Shoppers when information has not been entered correctly or additional information is needed so they can update and resubmit. Add comments to the requisition to provide clarity to the Shopper on what should be updated.

Note: Based on the selections you make in certain fields, other fields may or may not be visible. If you do not see a field on your request form that is in the below guide that is because the visibility on that field was not triggered, meaning you can continue completing your request.

Best Practices for Approving Carts and Placing Orders

- Before you withdraw a Requisition determine if the Requisition needs updates or if it needs to be removed completely. Once you withdraw a Requisition it cannot be reinstated, so if changes are needed return the Requisition for updates. Add comments and attachments to your draft requisition that will be visible to the Approver once you submitted the Requisition.
- When a good is delivered to you or a service is completed you should immediately receive the good or service in ProConnect to ensure no delays in the invoicing process.
- Requesters will submit Change Requests on Purchase Orders that require changes including: updating quantity of goods, updating accounting codes, and updating pricing.
- Requesters should be approving invoices on standing orders. Please approve invoices assigned to you in a timely manner to ensure no delays in the accounting process. (This is a new process for Rowan).

Note: Based on the selections you make in certain fields, other fields may or may not be visible. If you do not see a field on your request form that is in the below guide that is because the visibility on that field was not triggered, meaning you can continue completing your request.

Quick Reference

Reviewing Your Profile

- Click the user icon in the top right corner and select View My Profile.
- Use the Navigation bar on the left to update your User Profile and Preferences (Name, Time Zone, etc.), Default User Settings (Account Code Defaults and Default Addresses), or Notification Preferences.

Action Items & Quick Links

- Use the Action Items section on your Dashboard as listed above or use the flag icon located on the top of your screen to view any action items you have in ProConnect.
- Quick links on your dashboard provide easy access to frequently used actions and important sections within ProConnect including:
  - Requesting a Contract or Vendor
  - My Requisitions, Contract Request, Vendor Request
  - Search for Contracts or Vendors

Navigation Bar

- Use the navigation bar on the left side of the screen to access the different modules (Shop, Orders, Contracts, Accounts Payable, Vendors, Reporting) to view order history, search for contracts or vendors, view invoices, and view reports.

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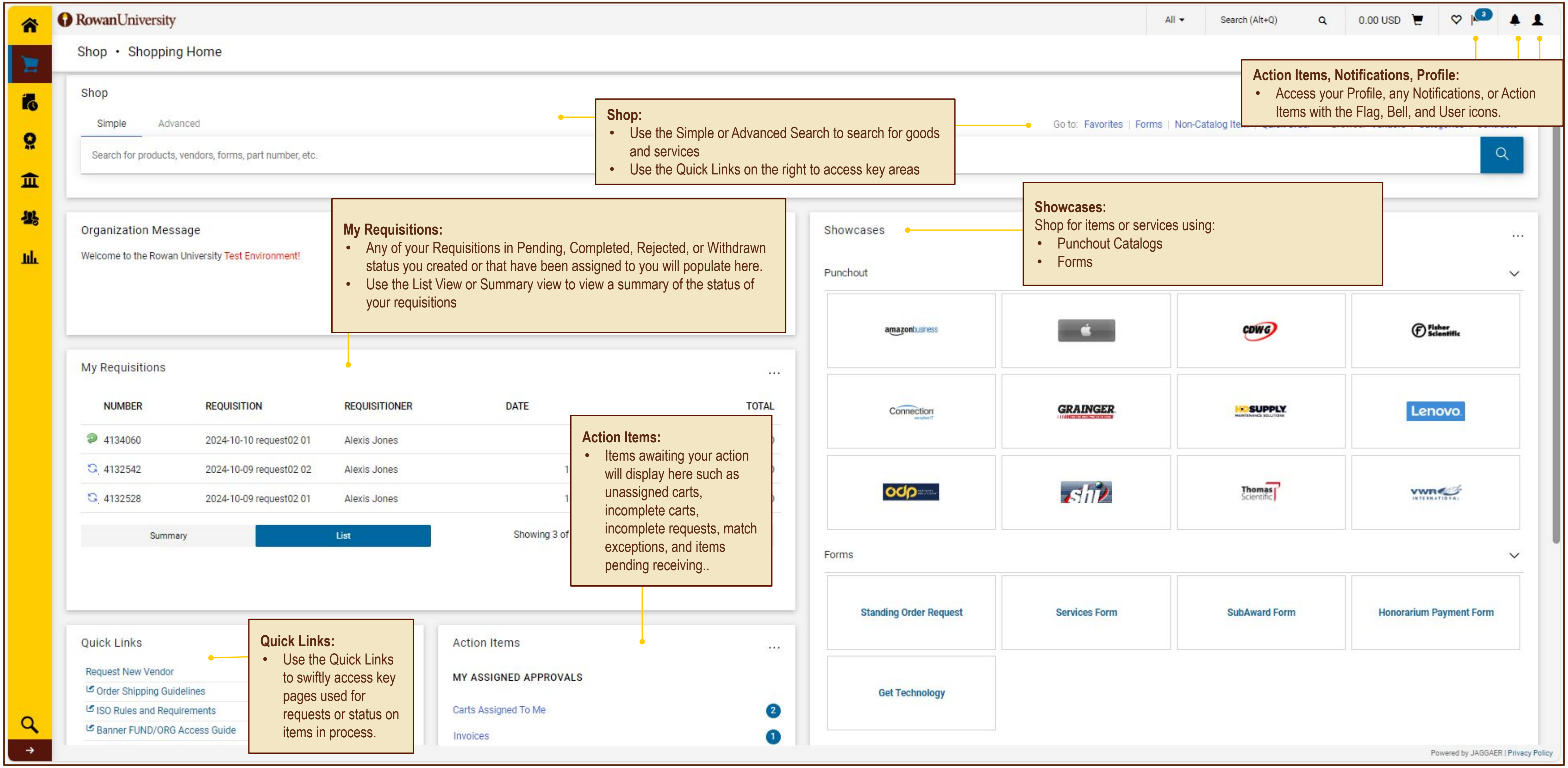
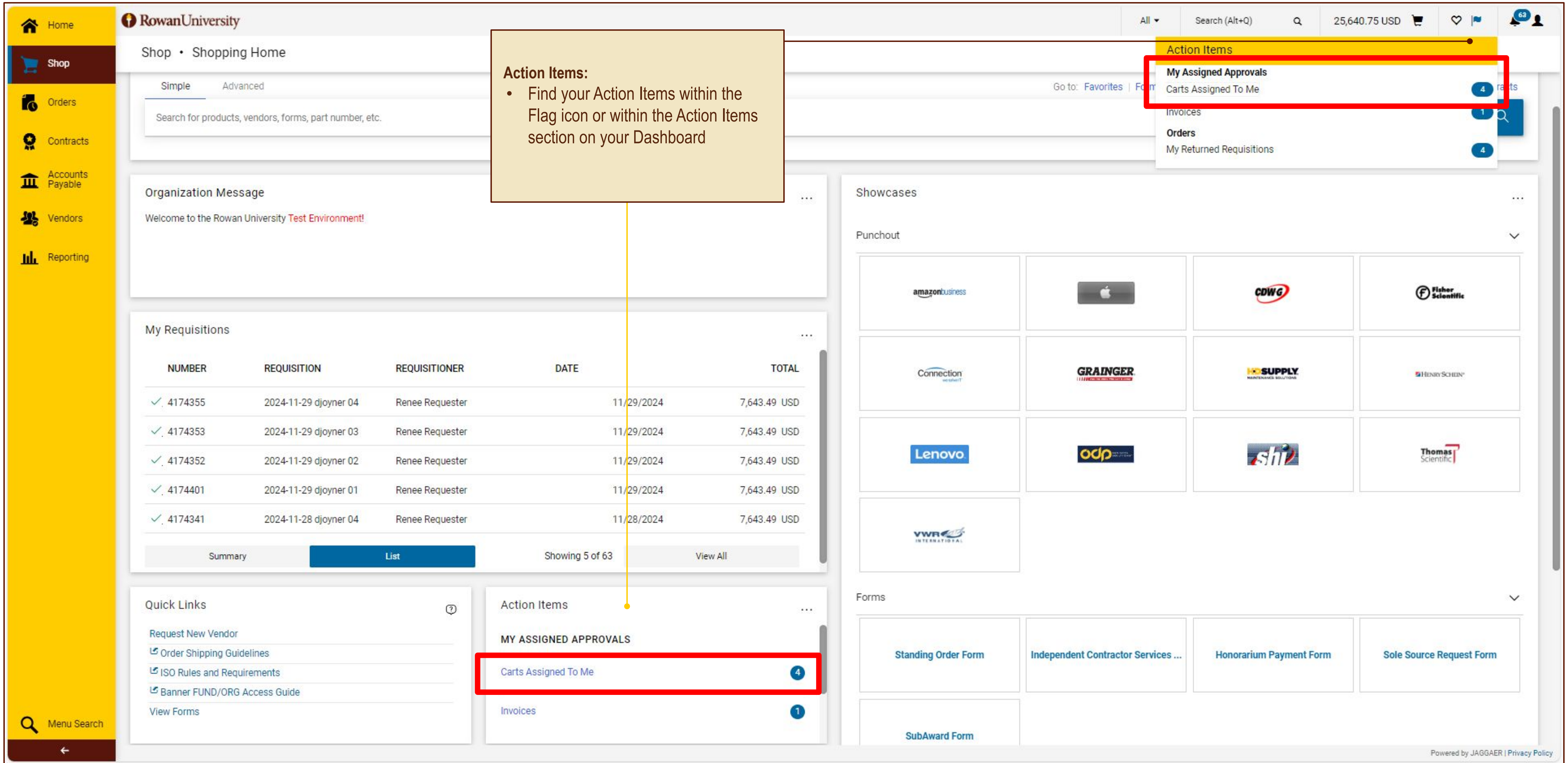
Home Page



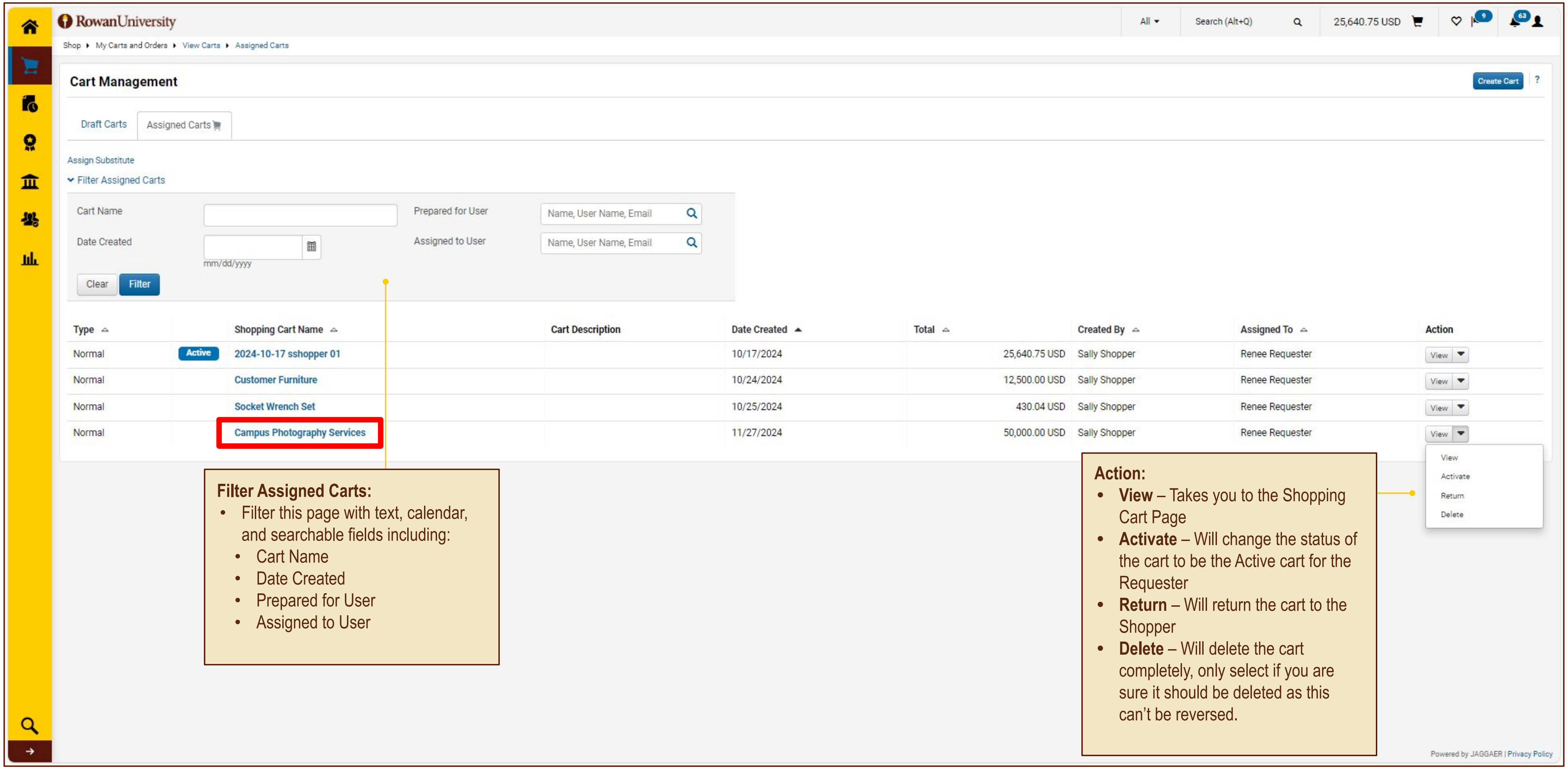
Step by Step

1. Reviewing Action Items - Access your action items assigned to you by navigating to the *Action Item* icon at the top of the screen or the *Action Items* section on your dashboard. Select the *action items* you are looking to complete



Step by Step

2. Assigned Carts Page - From the *Assigned Carts* page select the cart you would like to action or use the Action section where you can *View, Activate, Return, or Delete* directly from the page.



Filter Assigned Carts:

- Filter this page with text, calendar, and searchable fields including:
  - Cart Name
  - Date Created
  - Prepared for User
  - Assigned to User

Action:

- **View** – Takes you to the Shopping Cart Page
- **Activate** – Will change the status of the cart to be the Active cart for the Requester
- **Return** – Will return the cart to the Shopper
- **Delete** – Will delete the cart completely, only select if you are sure it should be deleted as this can't be reversed.

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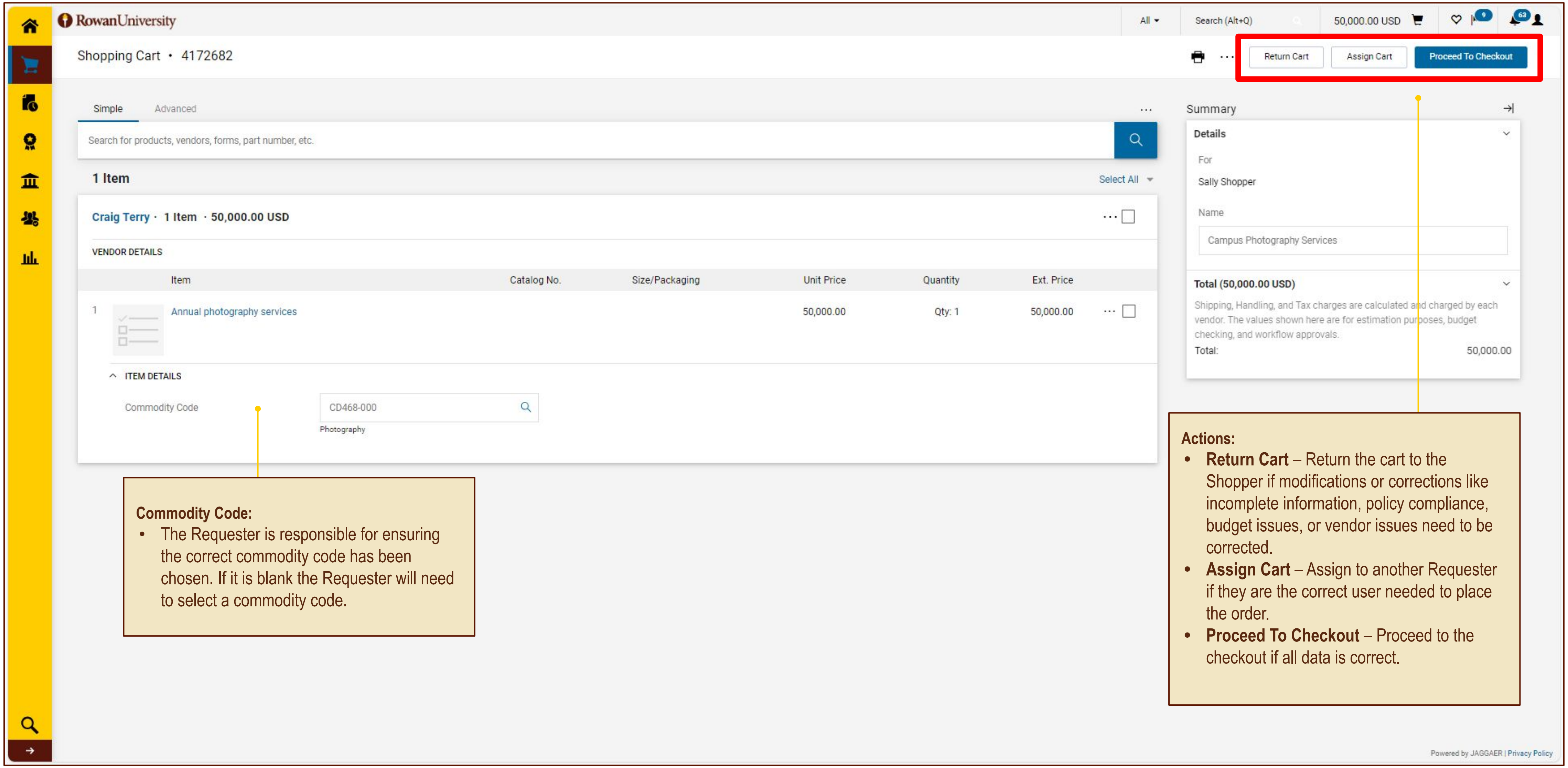
Step by Step

3. Review Cart - Review all Cart details to ensure they are correct. From this page you can Return Cart if adjustments need to be made by the shopper, Assign Cart if a different Requisitioner should review, or Proceed To Checkout



Commodity Code:

- The Requester is responsible for ensuring the correct commodity code has been chosen. If it is blank the Requester will need to select a commodity code.

Actions:

- **Return Cart** – Return the cart to the Shopper if modifications or corrections like incomplete information, policy compliance, budget issues, or vendor issues need to be corrected.
- **Assign Cart** – Assign to another Requester if they are the correct user needed to place the order.
- **Proceed To Checkout** – Proceed to the checkout if all data is correct.

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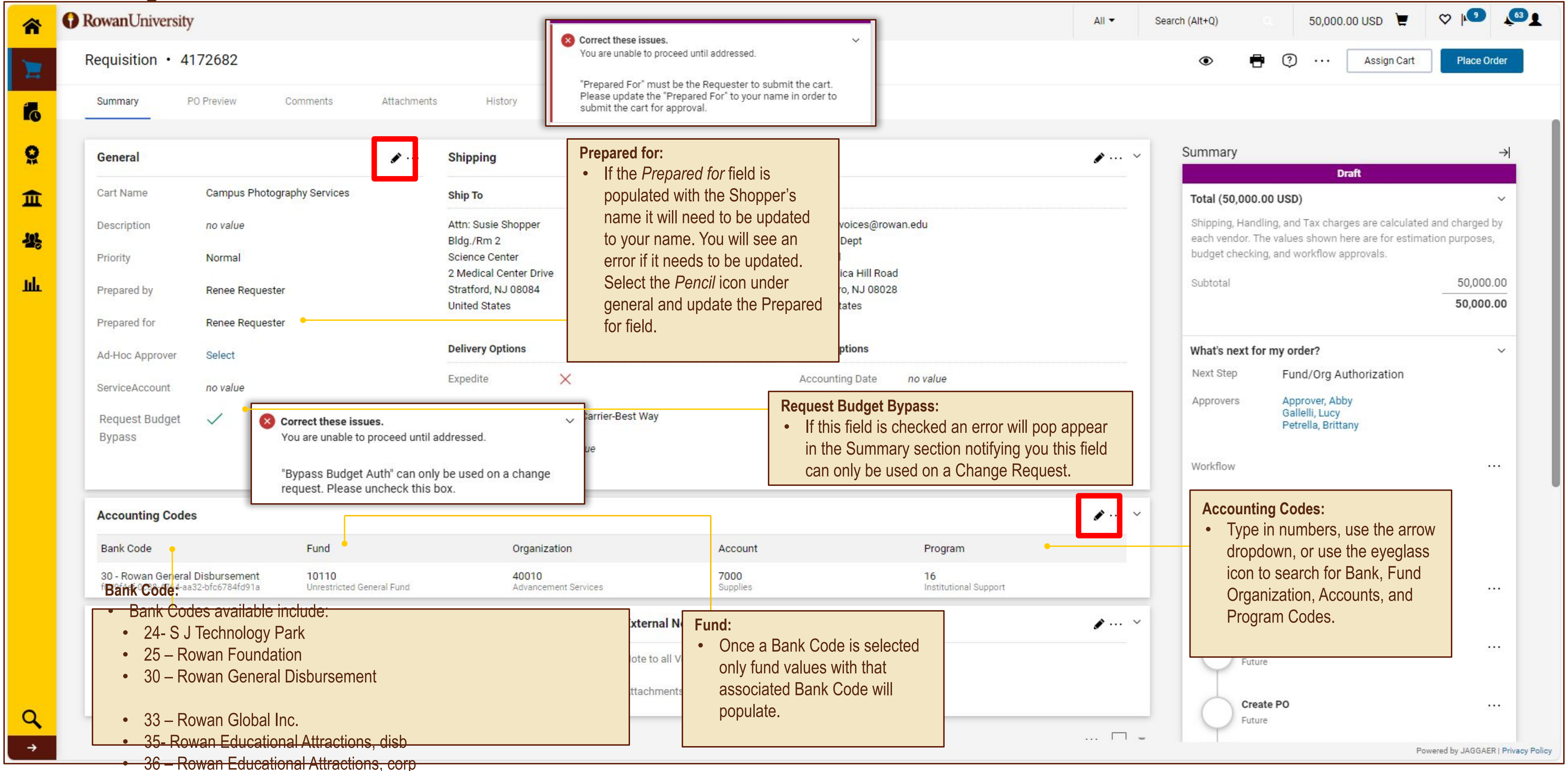
Step by Step

4a. Review Requisition - Review all *General, Shipping, and Billing* details and make adjustments as needed. Complete *Accounting Codes* information.



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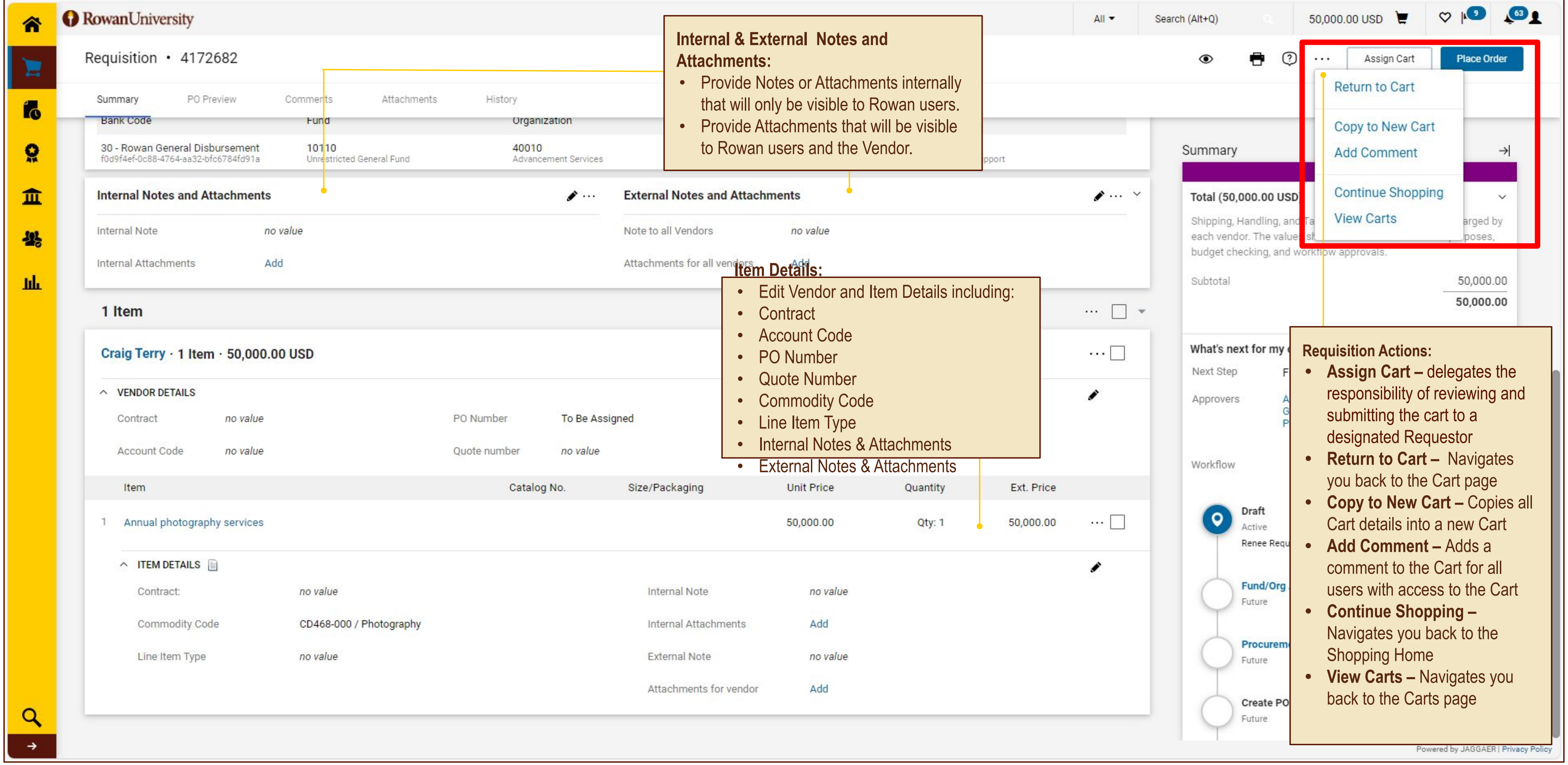
Step by Step

4b. Review Requisition (Continued) - Review or add Notes and Attachments. Review item details for accuracy. Use Requisition Actions if the Order is not ready to be placed or select Place Order if the order is ready to be placed.



Internal & External Notes and Attachments:

- Provide Notes or Attachments internally that will only be visible to Rowan users.
- Provide Attachments that will be visible to Rowan users and the Vendor.

Item Details:

- Edit Vendor and Item Details including:
- Contract
- Account Code
- PO Number
- Quote Number
- Commodity Code
- Line Item Type
- Internal Notes & Attachments
- External Notes & Attachments

Requisition Actions:

- **Assign Cart –** delegates the responsibility of reviewing and submitting the cart to a designated Requestor
- **Return to Cart –** Navigates you back to the Cart page
- **Copy to New Cart –** Copies all Cart details into a new Cart
- **Add Comment –** Adds a comment to the Cart for all users with access to the Cart
- **Continue Shopping –** Navigates you back to the Shopping Home
- **View Carts –** Navigates you back to the Carts page

Change Orders

(These actions do not take place during the original requisition creation)

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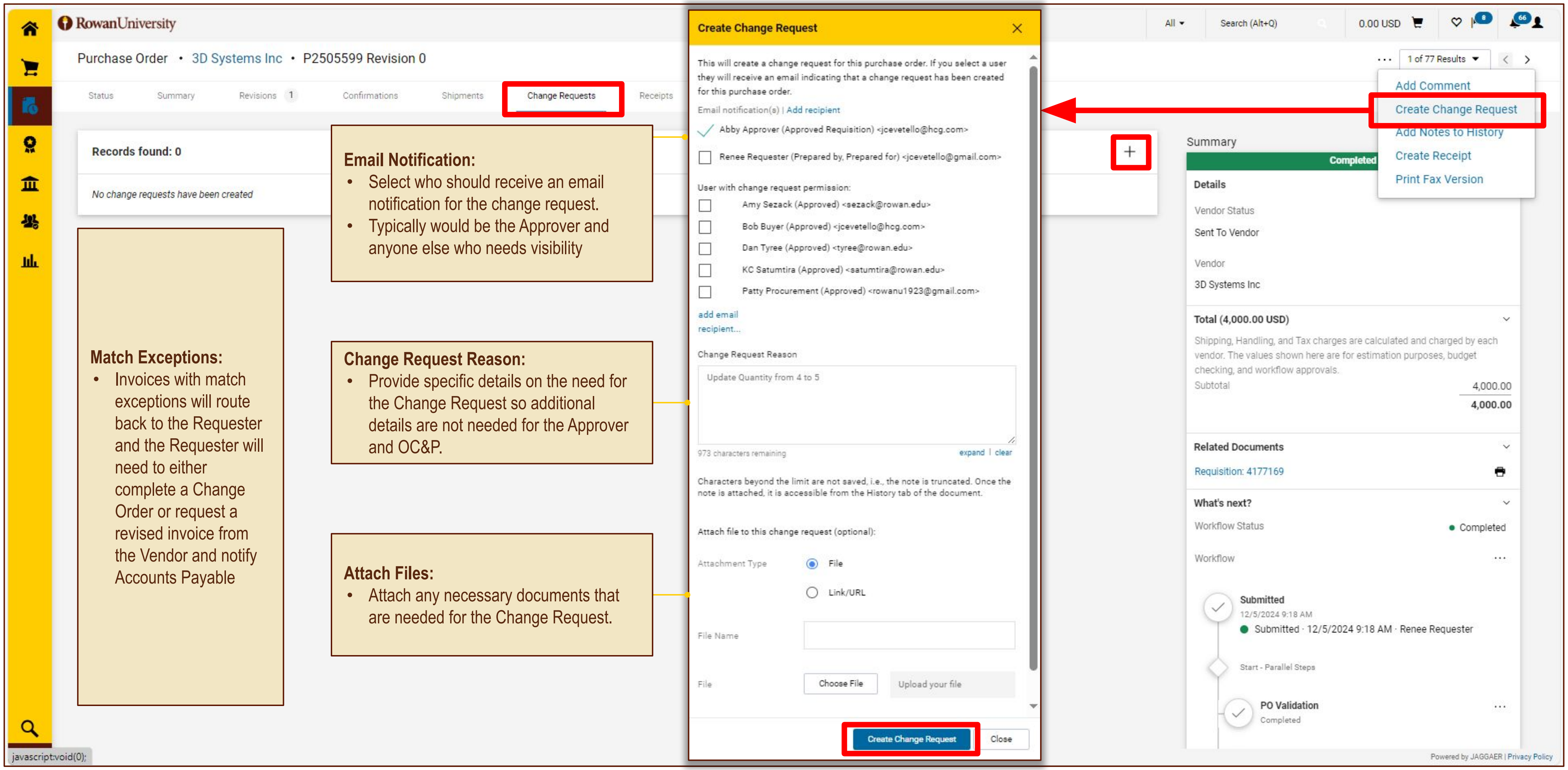
Step by Step

5a. Creating a Change Request - From the Purchase Order navigate to the *Change* Requests tab and select the + or *Action* icon and then select *Create Change Request*. Fill out details and select *Create Change Request*.



Email Notification:

- Select who should receive an email notification for the change request.
- Typically would be the Approver and anyone else who needs visibility

Match Exceptions:

- Invoices with match exceptions will route back to the Requester and the Requester will need to either complete a Change Order or request a revised invoice from the Vendor and notify Accounts Payable

Change Request Reason:

- Provide specific details on the need for the Change Request so additional details are not needed for the Approver and OC&P.

Attach Files:

- Attach any necessary documents that are needed for the Change Request.

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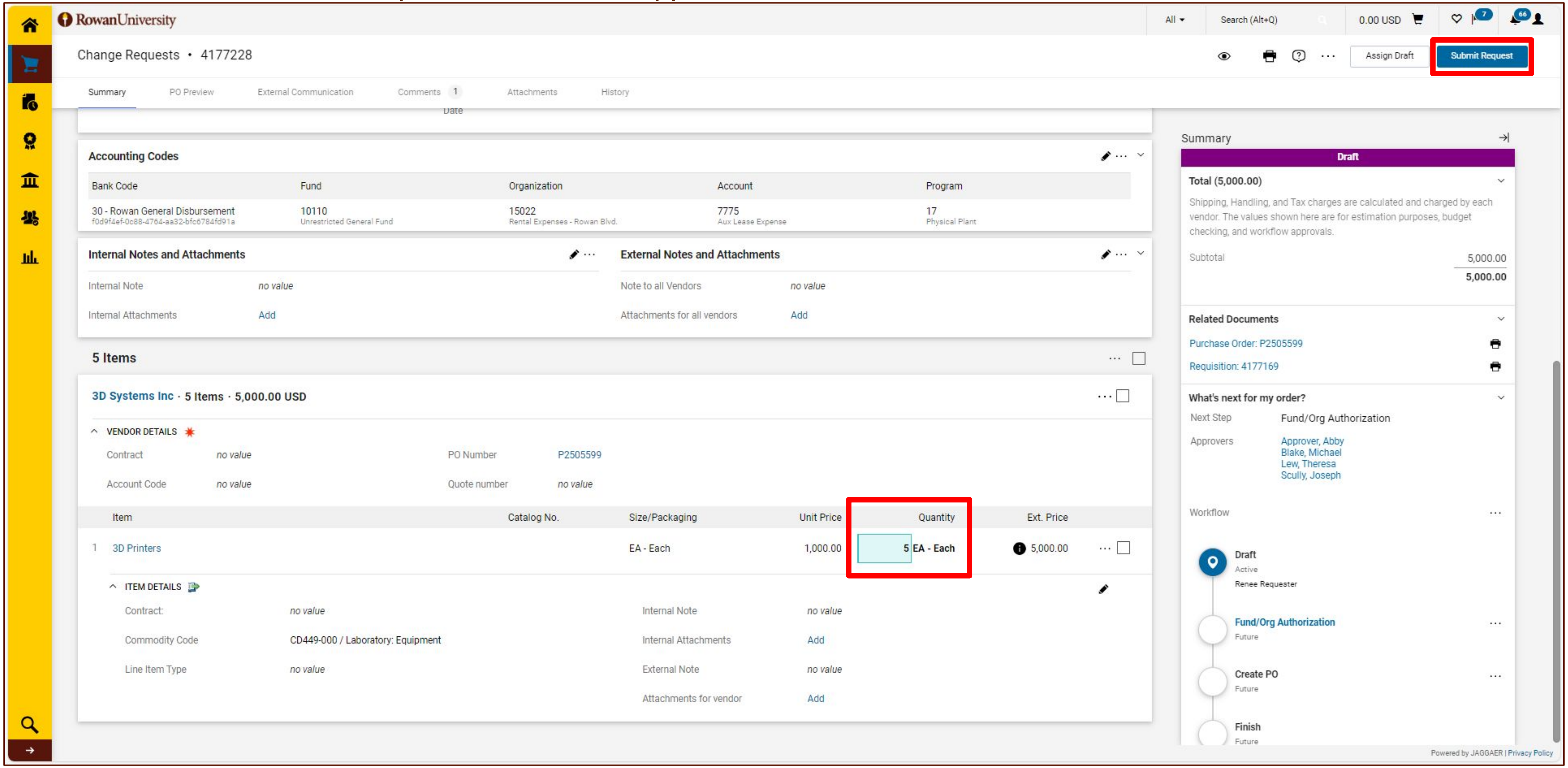
Step by Step

5b. Creating a Change Request - Make all necessary updates on the Change Request page. Once those updates have been made select *Submit Request* to submit for approval.



Invoice Approval

(These actions do not take place during the original requisition creation)

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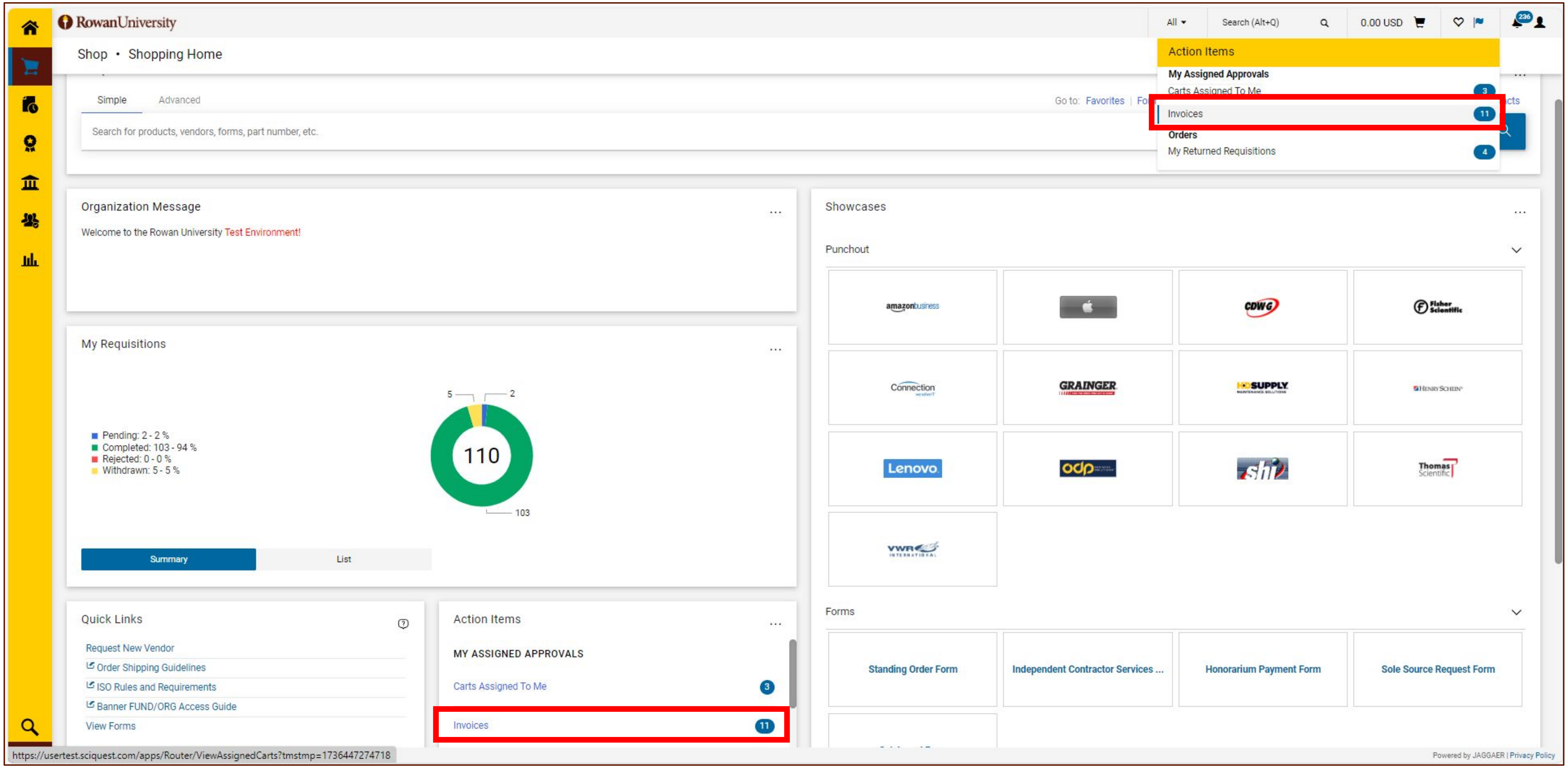
Step by Step

7a. Invoice Approval - From your dashboard navigate to invoices assigned to you through the *Action Items* widget on your dashboard or the *Action Items* notification flag and select *Invoices* from *My Assigned Approvals*.



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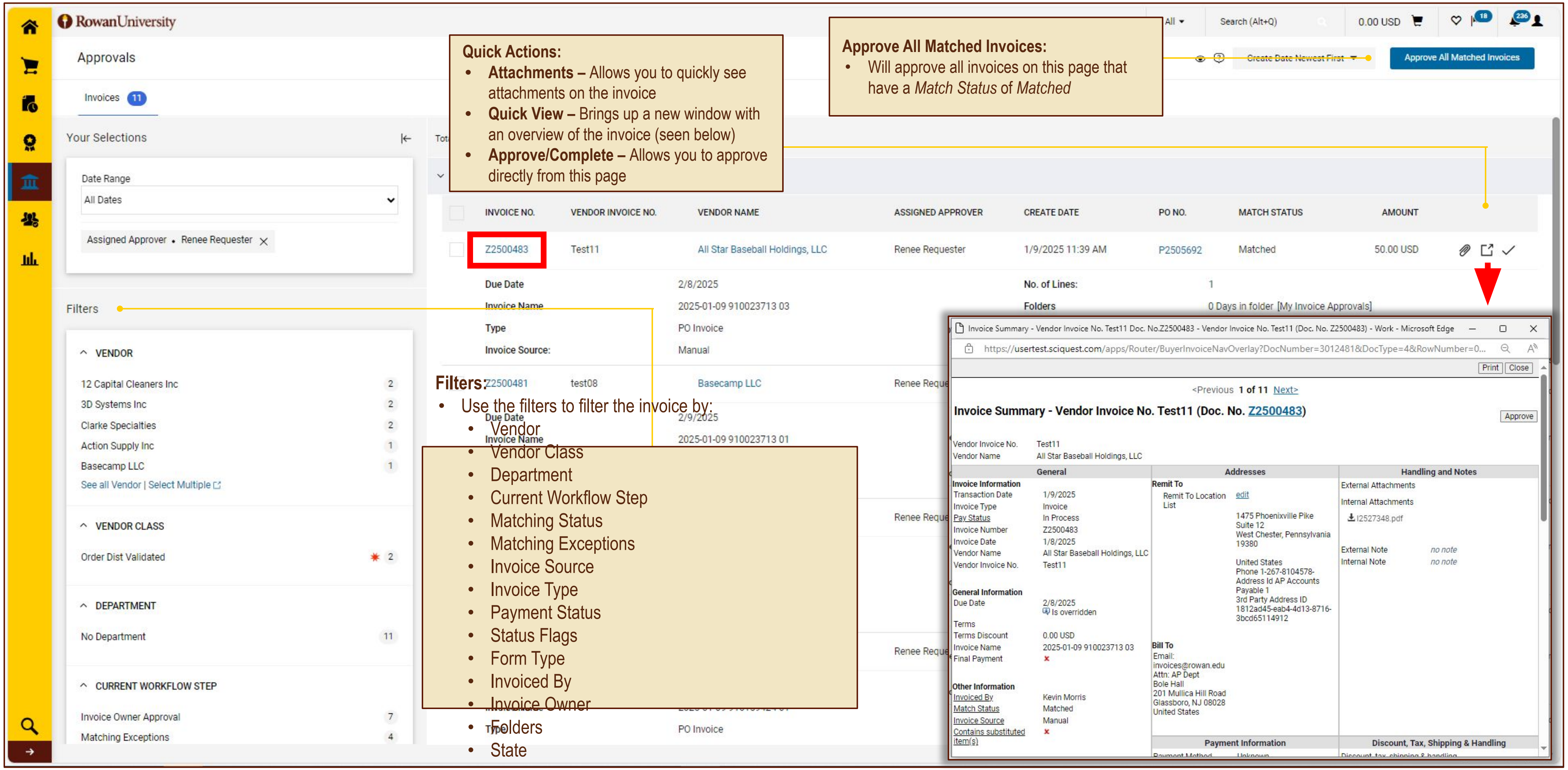
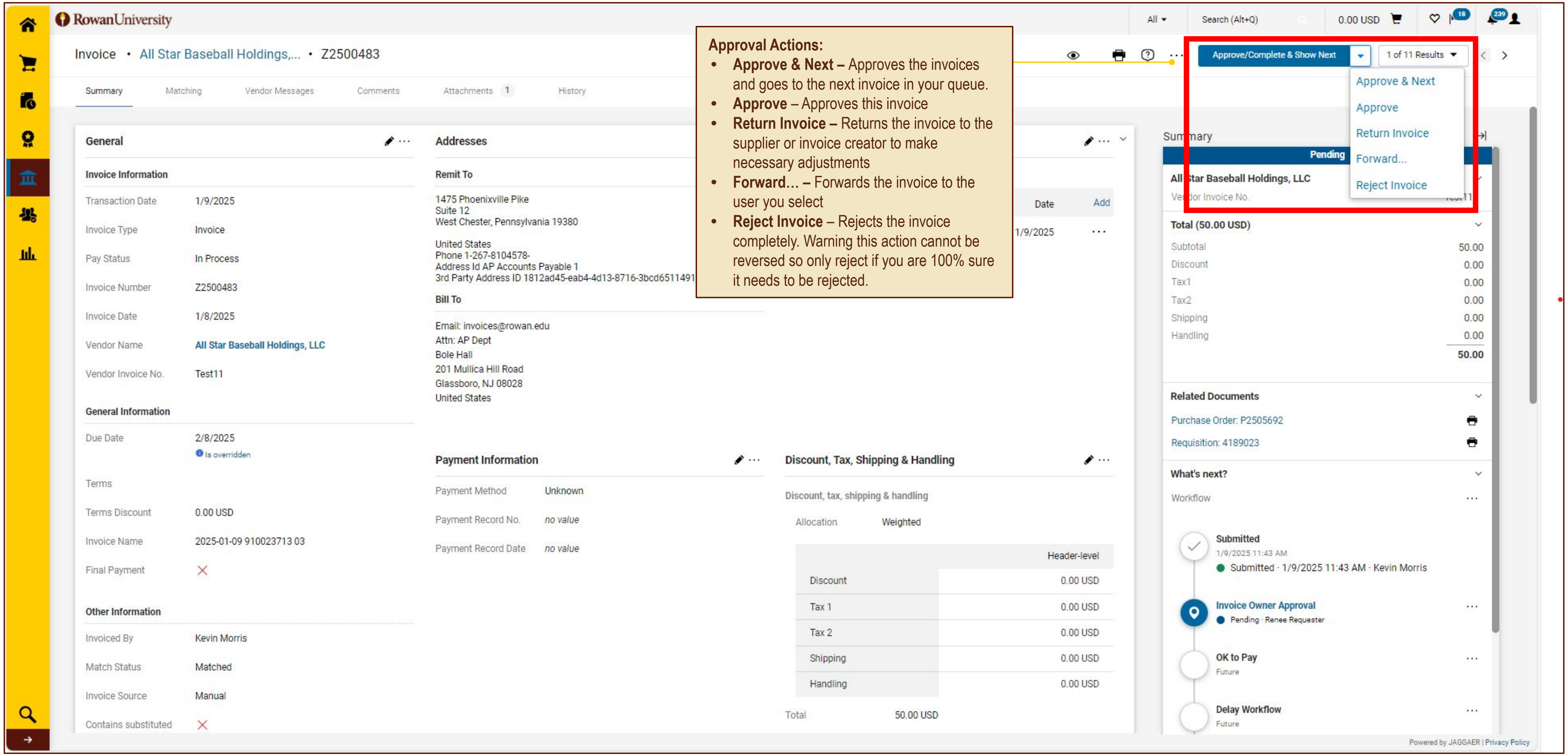
Step by Step

7b. Invoice Approval - From the *Approvals* page you have the option to view the attachments of the invoice, get a quick view of the invoice, Approve and individual invoice directly from this page, or Approve All Matched Invoices. You can also select the invoice number to go to the Invoice page. (For invoice with Match Exception proceed to step 8)



Step by Step

7c. Invoice Approval - From the *Invoice* page review all details of the invoice to ensure the details are correct. Once you are ready navigate to the Approval actions button and select the correct action.



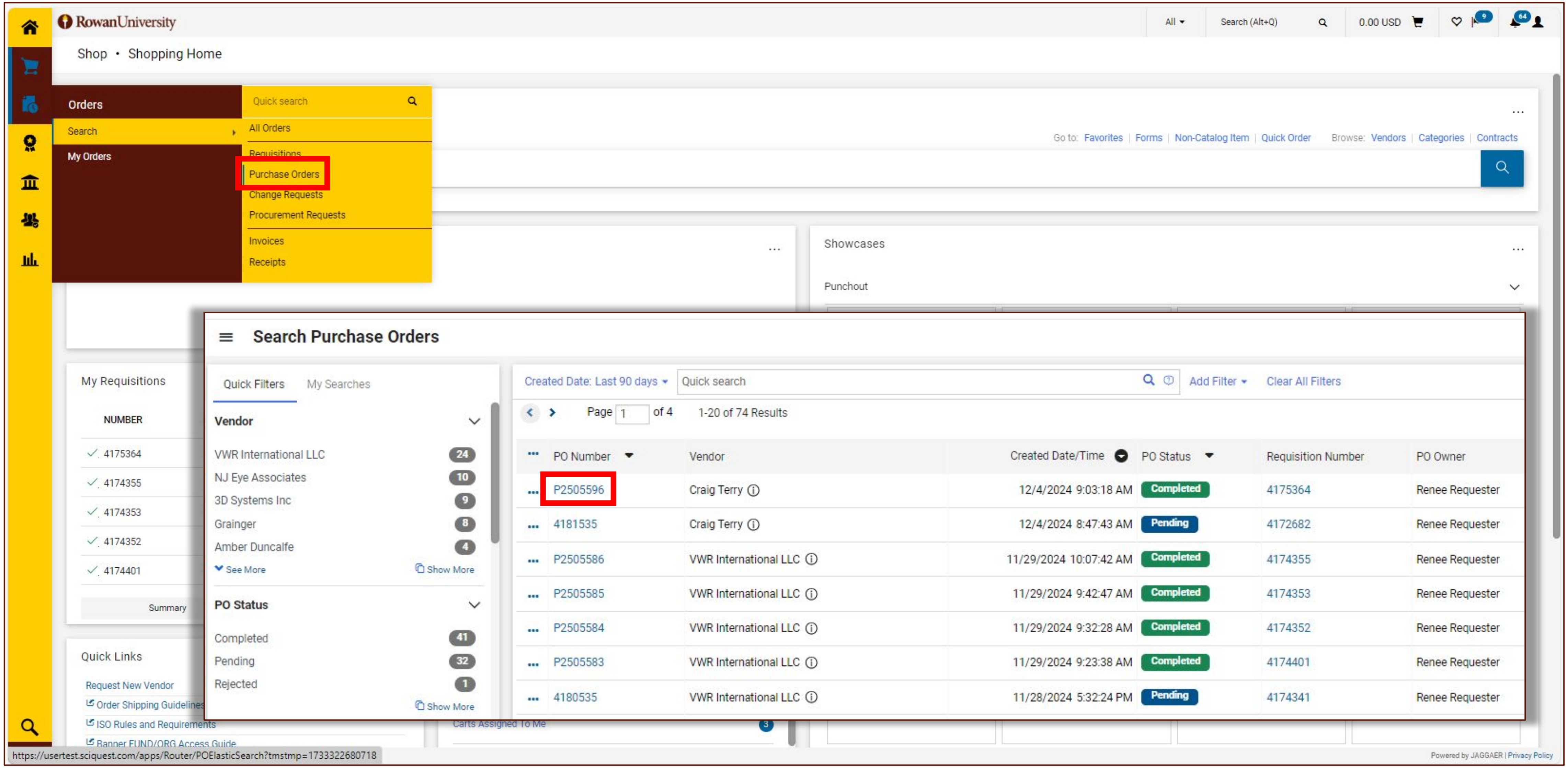
Receiving

(These actions do not take place during the original requisition creation)

*All orders, **excluding standing orders**, will require the Requester to receive the goods or services in ProConnect.*

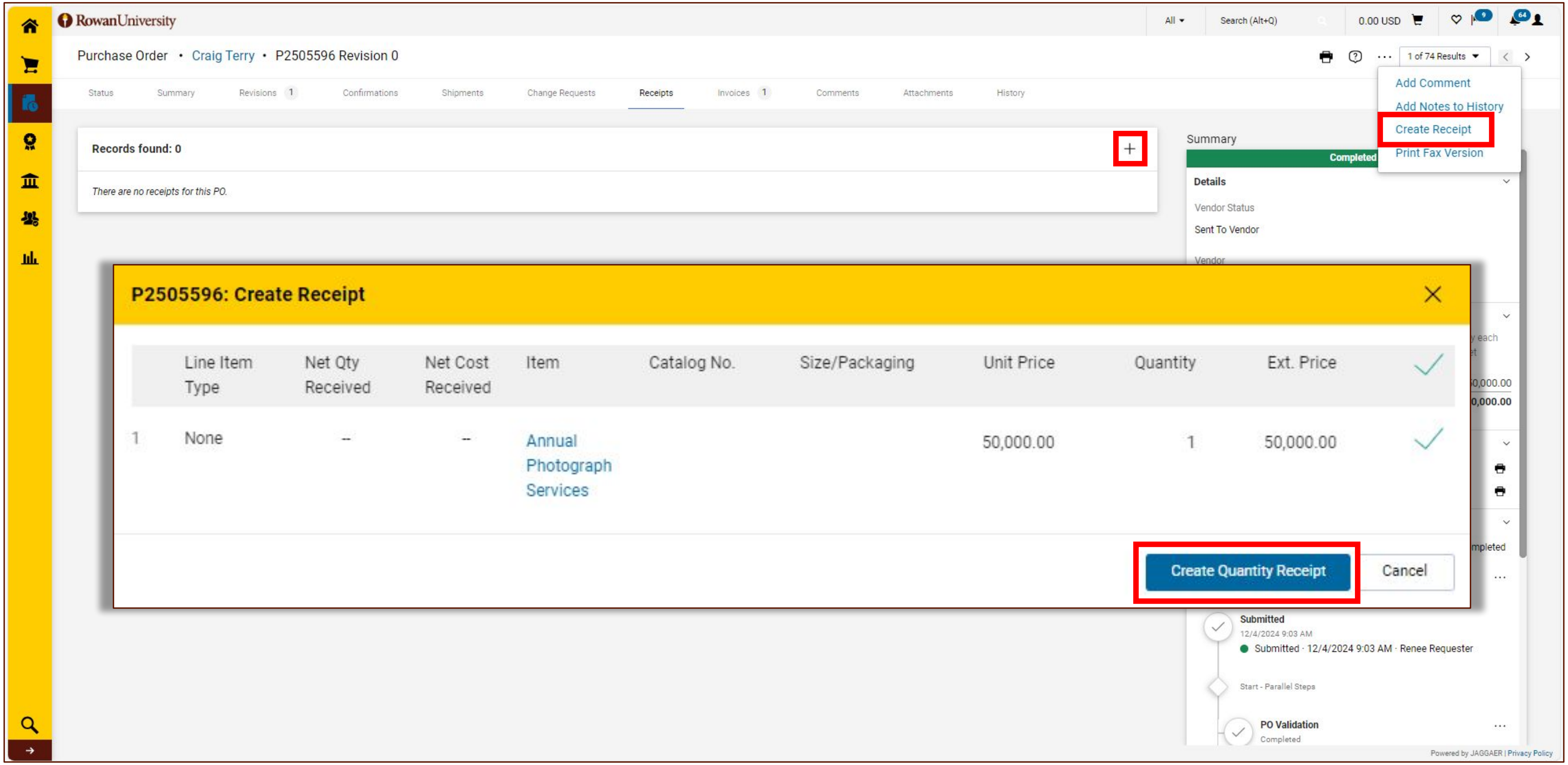
Step by Step

6a. Receipt Creation - Navigate to the PO by navigating to Orders > My Orders > My Purchase Orders. Then select the PO you are ready to receive items for.



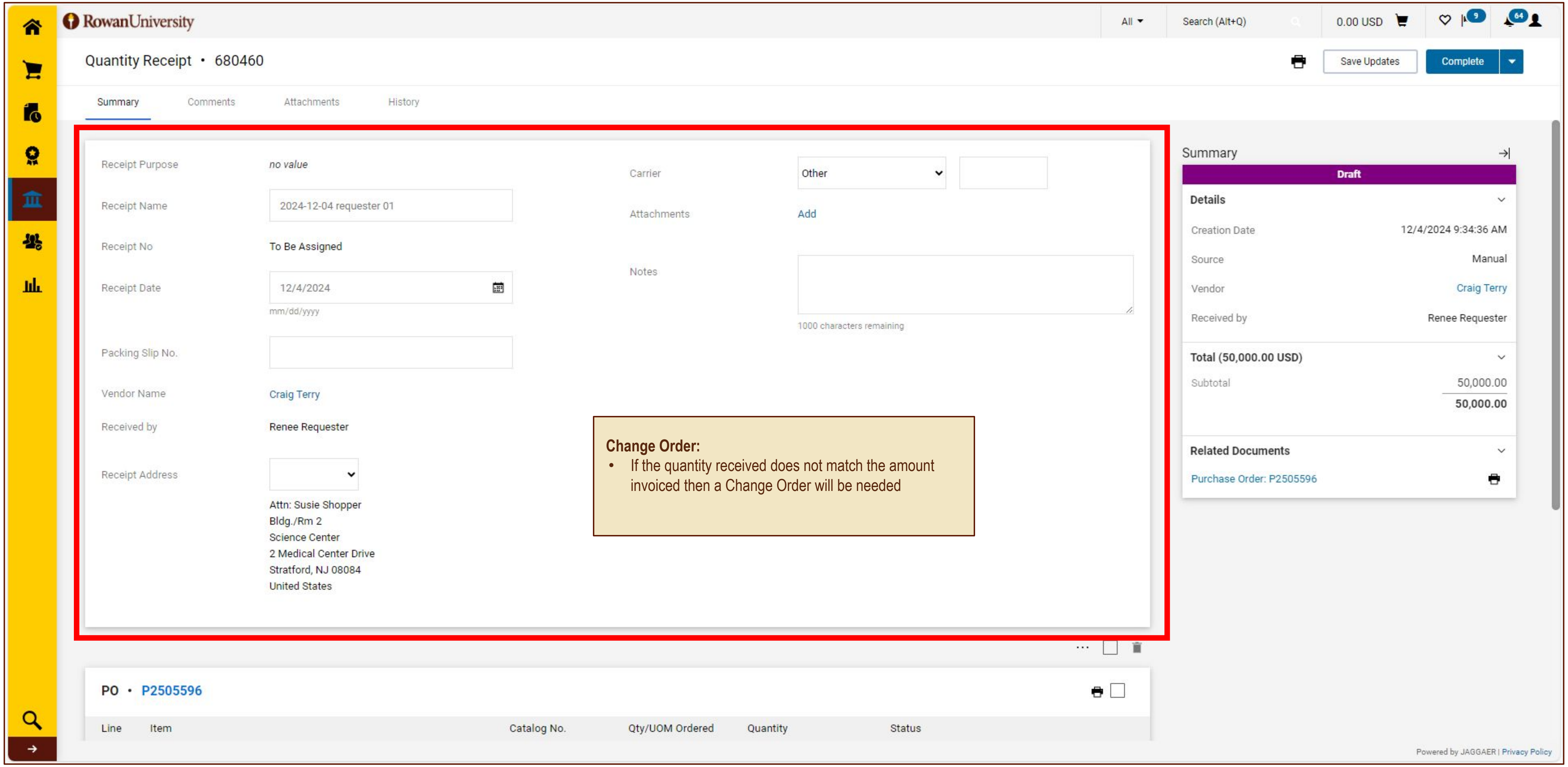
Step by Step

6b. Receipt Creation - Within the PO select the action icon and select *Create Receipt* or select the + icon from the *Receipts* tab. Select the line in which you are creating a receipt for and then select *Create Quantity Receipt*.



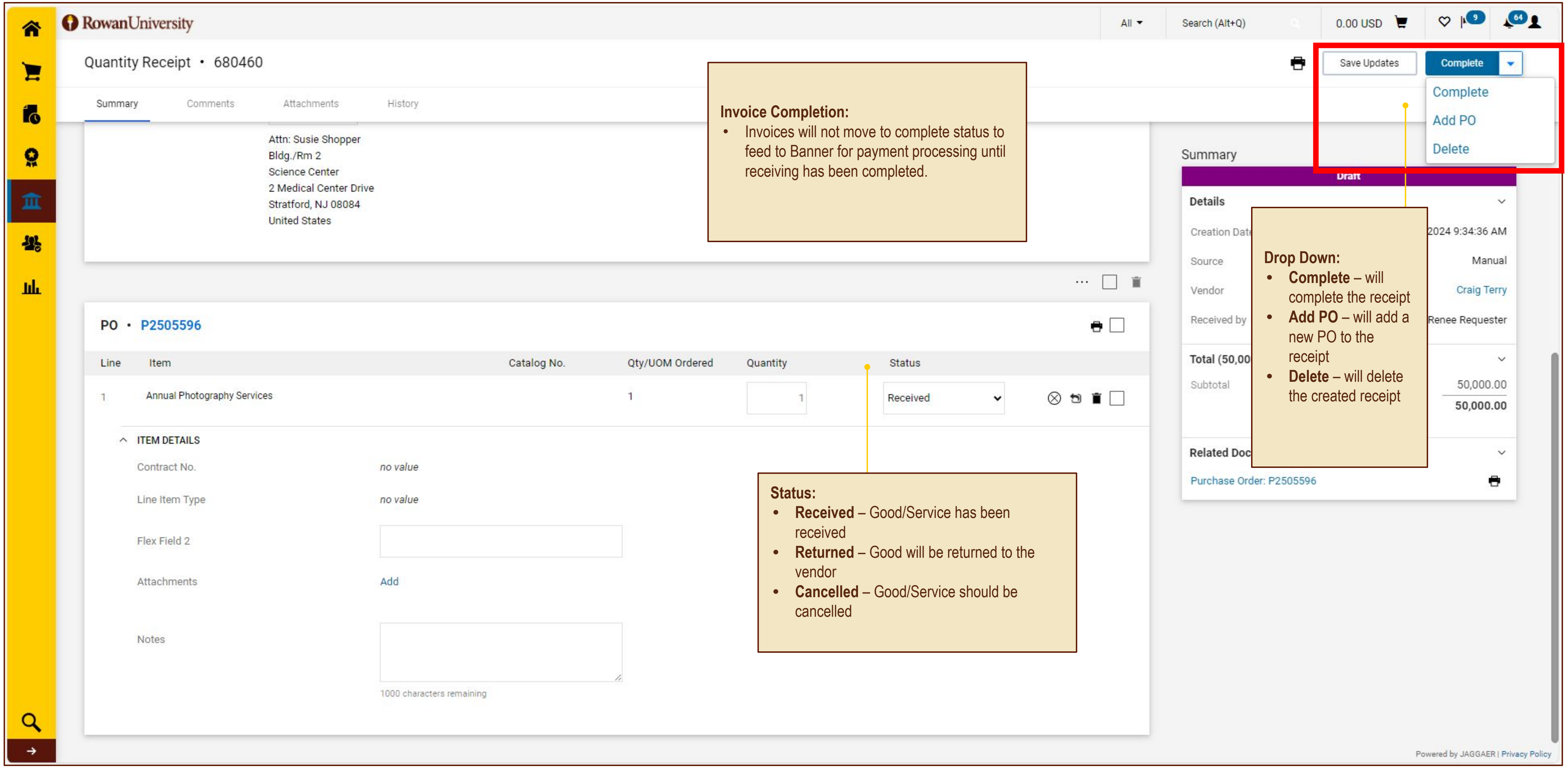
Step by Step

6c. Receipt Creation - Complete all required fields on the receipt. Fields will populate from the PO, but can be adjusted if needed and attachments and notes can be added.



Step by Step

6c. Receipt Creation (continued) - Update the Quantity of items received in the PO section to the correct quantity received from the vendor. Once complete select *Save Updates* or *Complete* to complete the receipt.



Match Exceptions

(These actions do not take place during the original requisition creation)

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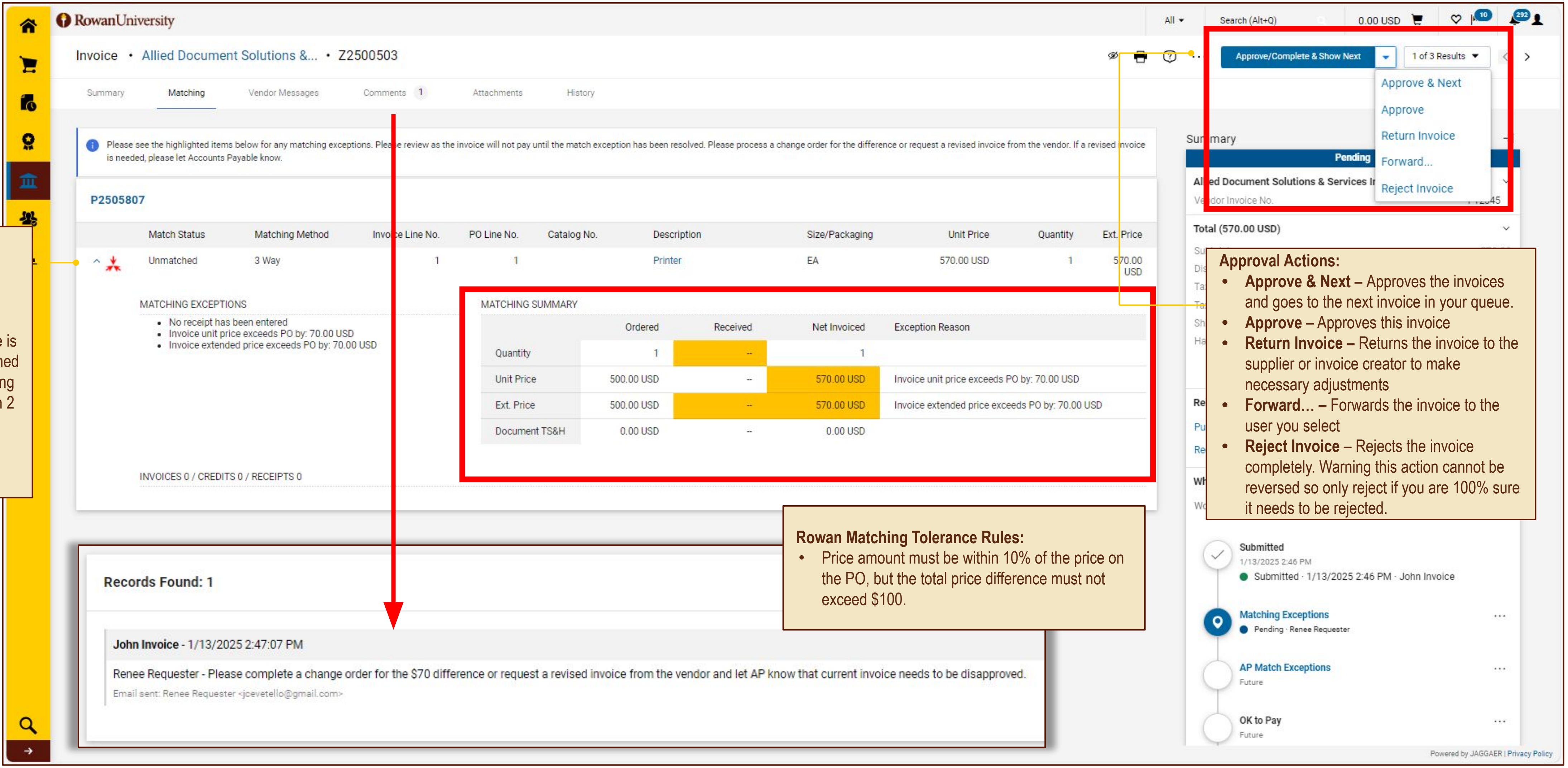
Step by Step

8. Match Exception - On the *Matching* tab you will be able to see the reason your invoice is in *Unmatched* status. Accounts Payable will also leave a comment in the *Comments* tab with instructions on creating a Change Request or getting a revised invoice from the Vendor. (To create a Change Request follow steps 5a and 5b)



Matching Type:

- Depending on the rules this icon will show if the invoice is matched, unmatched with 3 way matching or unmatched with 2 way matching.

Approval Actions:

- **Approve & Next –** Approves the invoices and goes to the next invoice in your queue.
- **Approve** – Approves this invoice
- **Return Invoice –** Returns the invoice to the supplier or invoice creator to make necessary adjustments
- **Forward… –** Forwards the invoice to the user you select
- **Reject Invoice** – Rejects the invoice completely. Warning this action cannot be reversed so only reject if you are 100% sure it needs to be rejected.

Rowan Matching Tolerance Rules:

- Price amount must be within 10% of the price on the PO, but the total price difference must not exceed $100.