



RowanUniversity

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.

Home Page

Rowan University

All
Search (Alt+Q)
0.00 USD




Shop • Shopping Home

Shop

Simple
Advanced

Search for products, vendors, forms, part number, etc.

Go to:
[Favorites](#) |
[Forms](#) |
[Non-Catalog Items](#)




Organization Message

Welcome to the Rowan University **Test Environment!**

My Requisitions:

- Any of your Requisitions in Pending, Completed, Rejected, or Withdrawn status you created or that have been assigned to you will populate here.
- Use the List View or Summary view to view a summary of the status of your requisitions

My Requisitions

NUMBER	REQUISITION	REQUISITIONER	DATE	TOTAL
 4134060	2024-10-10 request02 01	Alexis Jones		0
 4132542	2024-10-09 request02 02	Alexis Jones	1	0
 4132528	2024-10-09 request02 01	Alexis Jones	1	0

Summary
List

Showing 3 of

Quick Links:

- Use the Quick Links to swiftly access key pages used for requests or status on items in process.

[Request New Vendor](#)
[Order Shipping Guidelines](#)
[ISO Rules and Requirements](#)
[Banner FUND/ORG Access Guide](#)

Action Items:

- Items awaiting your action will display here such as unassigned carts, incomplete carts, incomplete requests, match exceptions, and items pending receiving..

Action Items

MY ASSIGNED APPROVALS

[Carts Assigned To Me](#)
2

[Invoices](#)
1

Action Items, Notifications, Profile:

- Access your Profile, any Notifications, or Action Items with the Flag, Bell, and User icons.

Shop:

- Use the Simple or Advanced Search to search for goods and services
- Use the Quick Links on the right to access key areas

Showcases:
Shop for items or services using:

- Punchout Catalogs
- Forms

Showcases

Punchout

amazon business

Apple

CDWG

Fisher Scientific

Connection

GRAINGER

HC SUPPLY

Lenovo

odp

shi

Thomas Scientific

VWR International

Forms

Standing Order Request

Services Form

SubAward Form

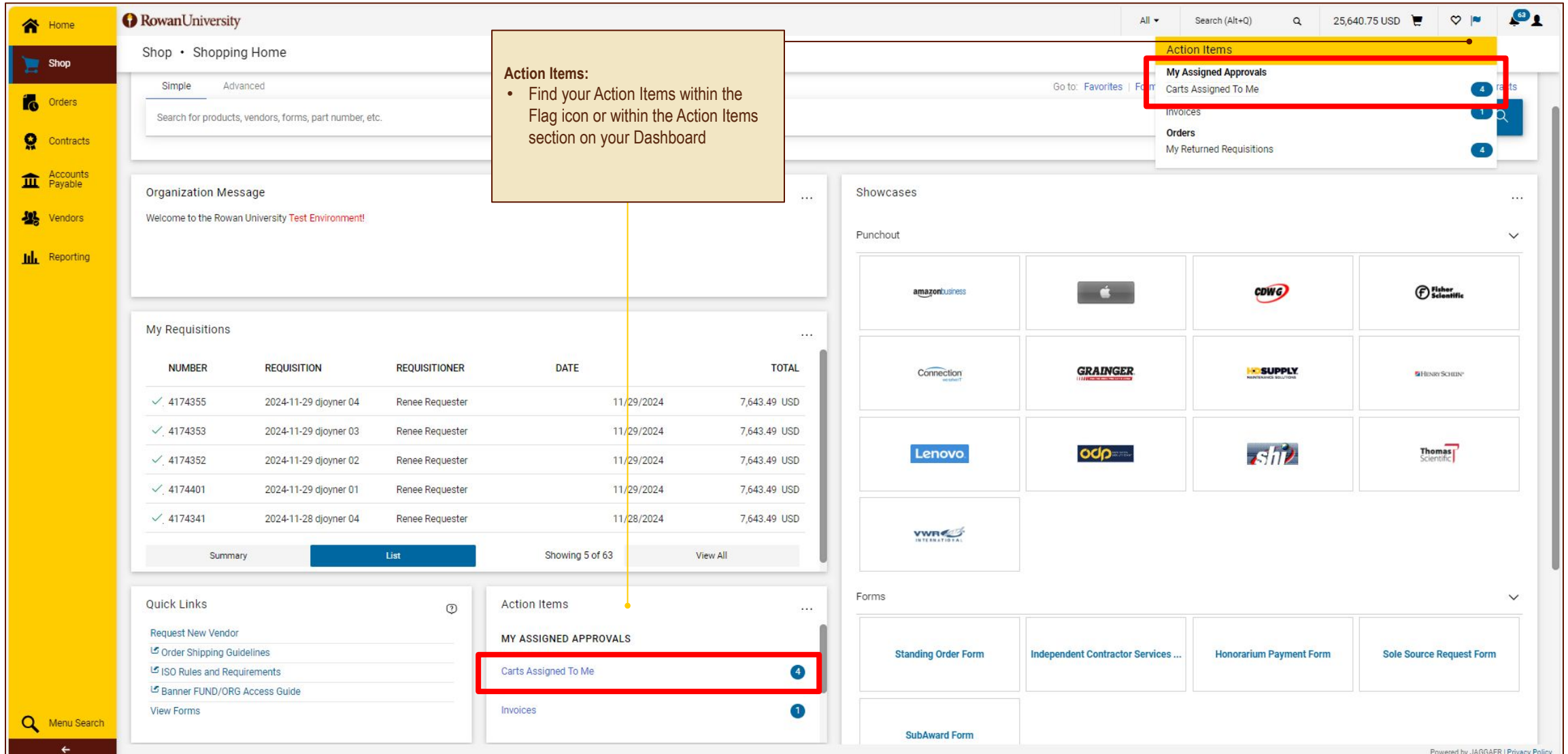
Honorarium Payment Form

Get Technology

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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



The screenshot displays the Rowan University procurement system dashboard. The 'Action Items' section is highlighted in red, showing a list of items assigned to the user. A yellow box highlights the 'Action Items' section on the dashboard, and a red box highlights the 'Action Items' section in the top navigation bar. A yellow line connects the two boxes.

Action Items:

- Find your Action Items within the Flag icon or within the Action Items section on your Dashboard

My Requisitions

NUMBER	REQUISITION	REQUISITIONER	DATE	TOTAL
✓ 4174355	2024-11-29 djoyner 04	Renee Requester	11/29/2024	7,643.49 USD
✓ 4174353	2024-11-29 djoyner 03	Renee Requester	11/29/2024	7,643.49 USD
✓ 4174352	2024-11-29 djoyner 02	Renee Requester	11/29/2024	7,643.49 USD
✓ 4174401	2024-11-29 djoyner 01	Renee Requester	11/29/2024	7,643.49 USD
✓ 4174341	2024-11-28 djoyner 04	Renee Requester	11/28/2024	7,643.49 USD

Showing 5 of 63

Quick Links

- Request New Vendor
- Order Shipping Guidelines
- ISO Rules and Requirements
- Banner FUND/ORG Access Guide
- View Forms

Action Items

MY ASSIGNED APPROVALS

- Carts Assigned To Me (4)
- Invoices (1)

Showcases

Punchout

- amazonbusiness
- apple
- CDWG
- Fisher Scientific
- Connection
- GRAINGER
- ISO SUPPLY
- HENRY SCHEIN
- Lenovo
- odp
- stl
- Thomas Scientific
- VWR International

Forms

- Standing Order Form
- Independent Contractor Services ...
- Honorarium Payment Form
- Sole Source Request Form
- SubAward Form

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.

RowanUniversity
All ▾
Search (Alt+Q) 🔍
25,640.75 USD 🛒
🏠
👤 9
🔔 68

[Shop](#) ▶ [My Carts and Orders](#) ▶ [View Carts](#) ▶ [Assigned Carts](#)

Cart Management Create Cart ?

[Draft Carts](#)
[Assigned Carts](#)

[Assign Substitute](#)

▼ Filter Assigned Carts

Card Name

Prepared for User
 🔍

Date Created
 📅

Assigned to User
 🔍

[Clear](#)
[Filter](#)

Type ▲	Shopping Cart Name ▲	Card Description	Date Created ▲	Total ▲	Created By ▲	Assigned To ▲	Action
Normal	Active 2024-10-17 sshopper 01		10/17/2024	25,640.75 USD	Sally Shopper	Renee Requester	View ▼
Normal	Customer Furniture		10/24/2024	12,500.00 USD	Sally Shopper	Renee Requester	View ▼
Normal	Socket Wrench Set		10/25/2024	430.04 USD	Sally Shopper	Renee Requester	View ▼
Normal	Campus Photography Services		11/27/2024	50,000.00 USD	Sally Shopper	Renee Requester	View ▼ View Activate Return Delete

Filter Assigned Carts:

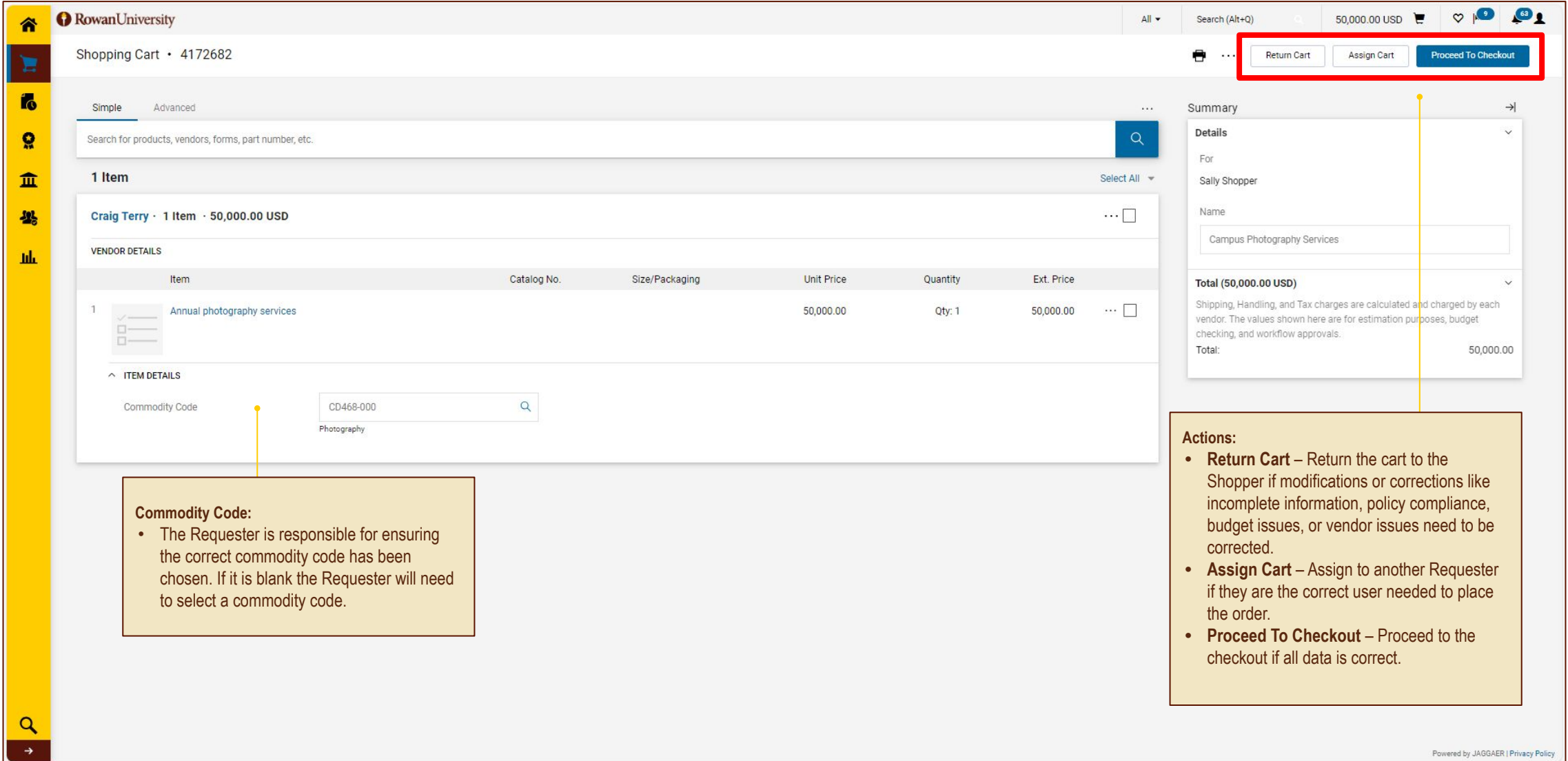
- Filter this page with text, calendar, and searchable fields including:
 - Card Name
 - Date Created
 - Prepared for User
 - Assigned to User

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.

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



Shopping Cart • 4172682

Return Cart Assign Cart Proceed To Checkout

Simple Advanced

Search for products, vendors, forms, part number, etc.

1 Item [Select All](#)

Craig Terry • 1 Item • 50,000.00 USD

VENDOR DETAILS

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 <input checked="" type="checkbox"/> Annual photography services			50,000.00	Qty: 1	50,000.00

ITEM DETAILS

Commodity Code [Photography](#)

Summary

Details

For Sally Shopper

Name Campus Photography Services

Total (50,000.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each vendor. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Total: 50,000.00

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.

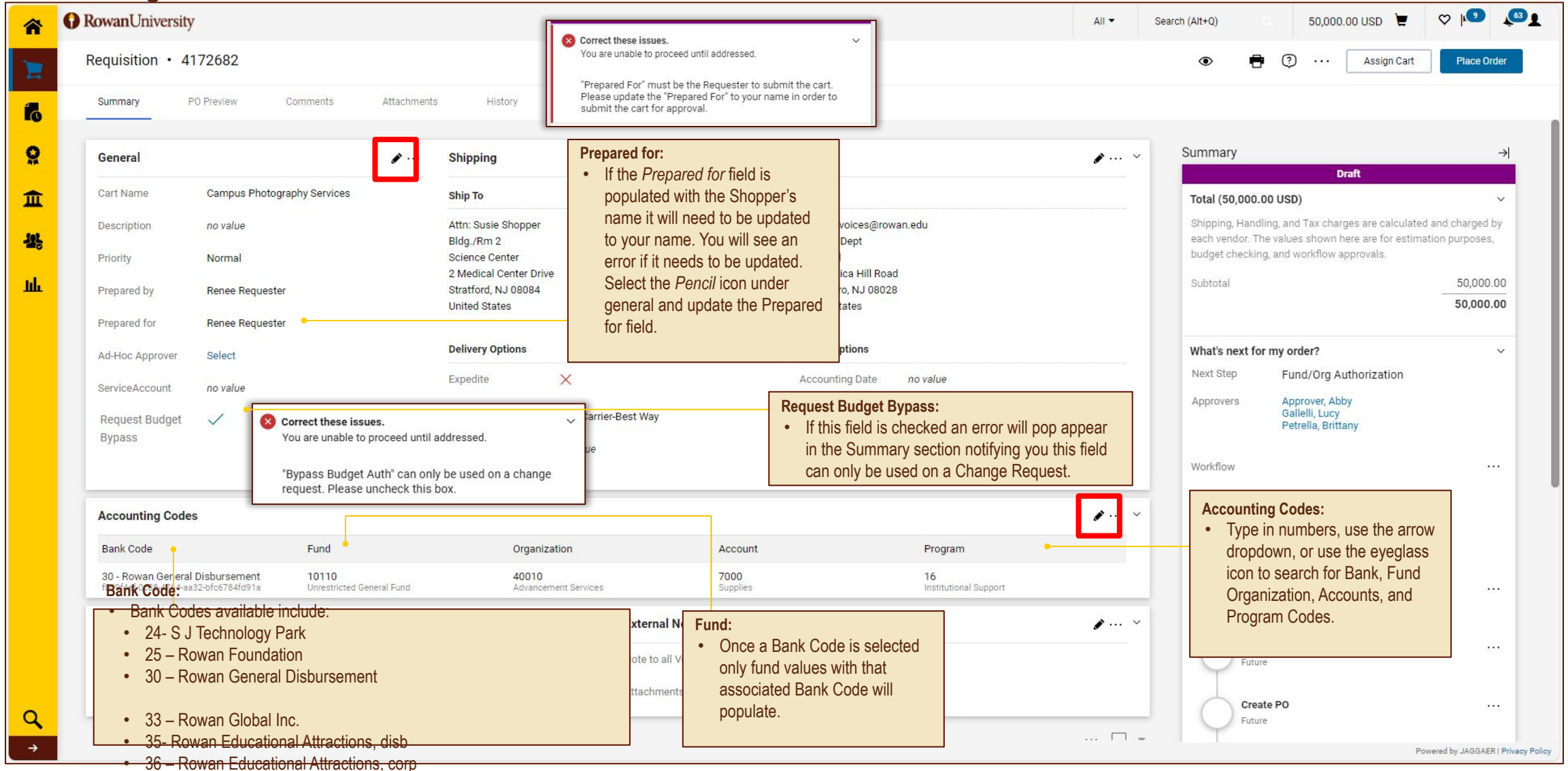
Actions:

- 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.



Requisition • 4172682

Summary | PO Preview | Comments | Attachments | History

General

Cart Name: Campus Photography Services

Description: no value

Priority: Normal

Prepared by: Renee Requester

Prepared for: Renee Requester

Ad-Hoc Approver: Select

ServiceAccount: no value

Request Budget Bypass: ☒

Shipping

Ship To: Attn: Susie Shopper, Bldg./Rm 2, Science Center, 2 Medical Center Drive, Stratford, NJ 08084, United States

Delivery Options: Expedite ☒

Accounting Date: no value

Accounting Codes

Bank Code	Fund	Organization	Account	Program
30 - Rowan General Disbursement	10110	40010	7000	16
Unrestricted General Fund	Unrestricted General Fund	Advancement Services	Supplies	Institutional Support

Correct these issues.
You are unable to proceed until addressed.

"Prepared For" must be the Requester to submit the cart. Please update the "Prepared For" to your name in order to submit the cart for approval.

Prepared for:

- If the *Prepared for* field is populated with the Shopper's name it will need to be updated to your name. You will see an error if it needs to be updated. Select the *Pencil* icon under general and update the Prepared for field.

Request Budget Bypass:

- If this field is checked an error will pop appear in the Summary section notifying you this field can only be used on a Change Request.

Correct these issues.
You are unable to proceed until addressed.

"Bypass Budget Auth" can only be used on a change request. Please uncheck this box.

Accounting Codes:

- Type in numbers, use the arrow dropdown, or use the eyeglass icon to search for Bank, Fund Organization, Accounts, and Program Codes.

Bank Codes available include:

- 24- S J Technology Park
- 25 – Rowan Foundation
- 30 – Rowan General Disbursement
- 33 – Rowan Global Inc.
- 35- Rowan Educational Attractions, disb
- 36 – Rowan Educational Attractions, corp

Fund:

- Once a Bank Code is selected only fund values with that associated Bank Code will populate.

Summary

Draft

Total (50,000.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each vendor. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal: 50,000.00

What's next for my order?

Next Step: Fund/Org Authorization

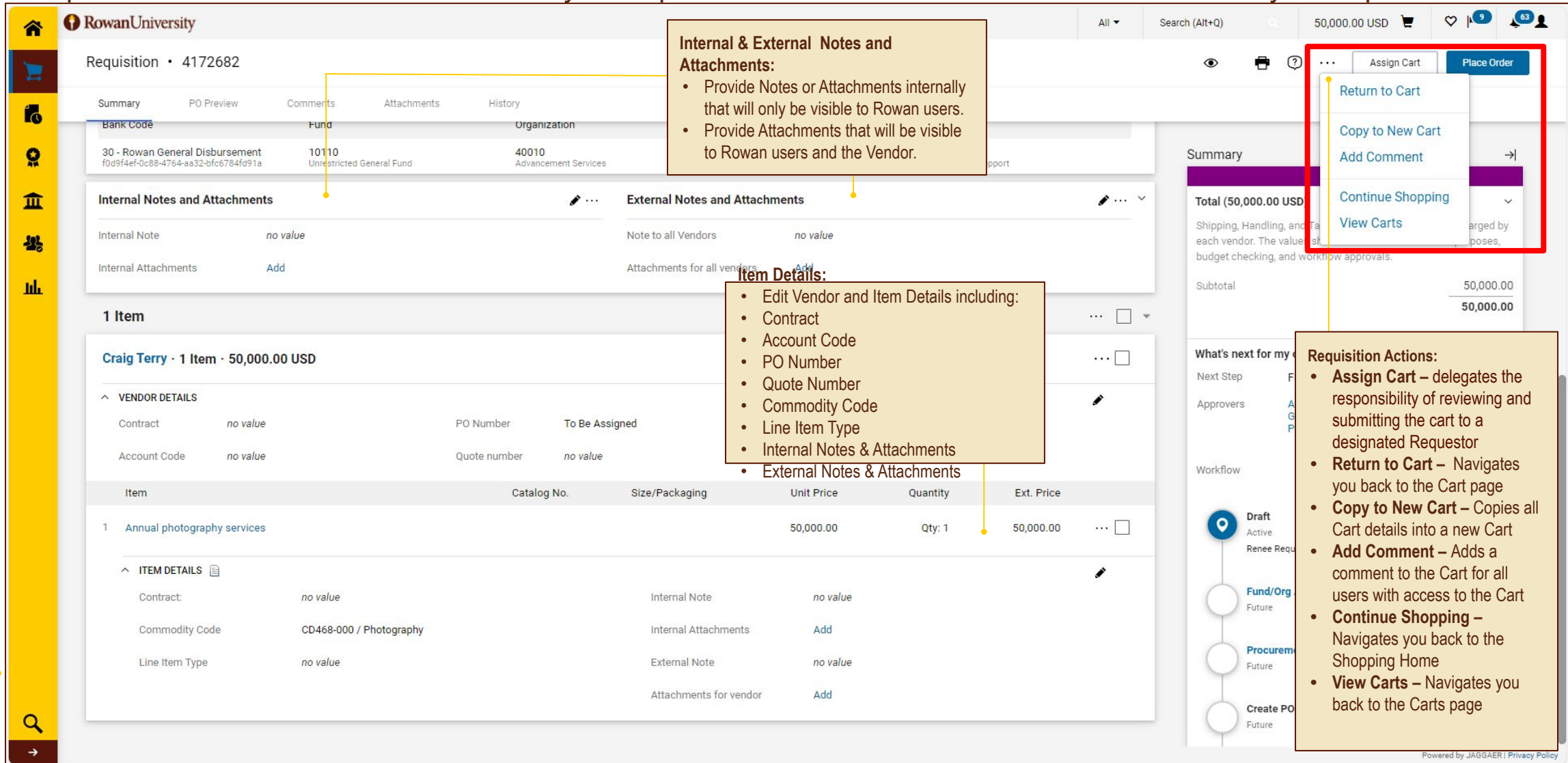
Approvers: Approver, Abby Gallelli, Lucy Petrella, Brittany

Workflow: Create PO

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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:

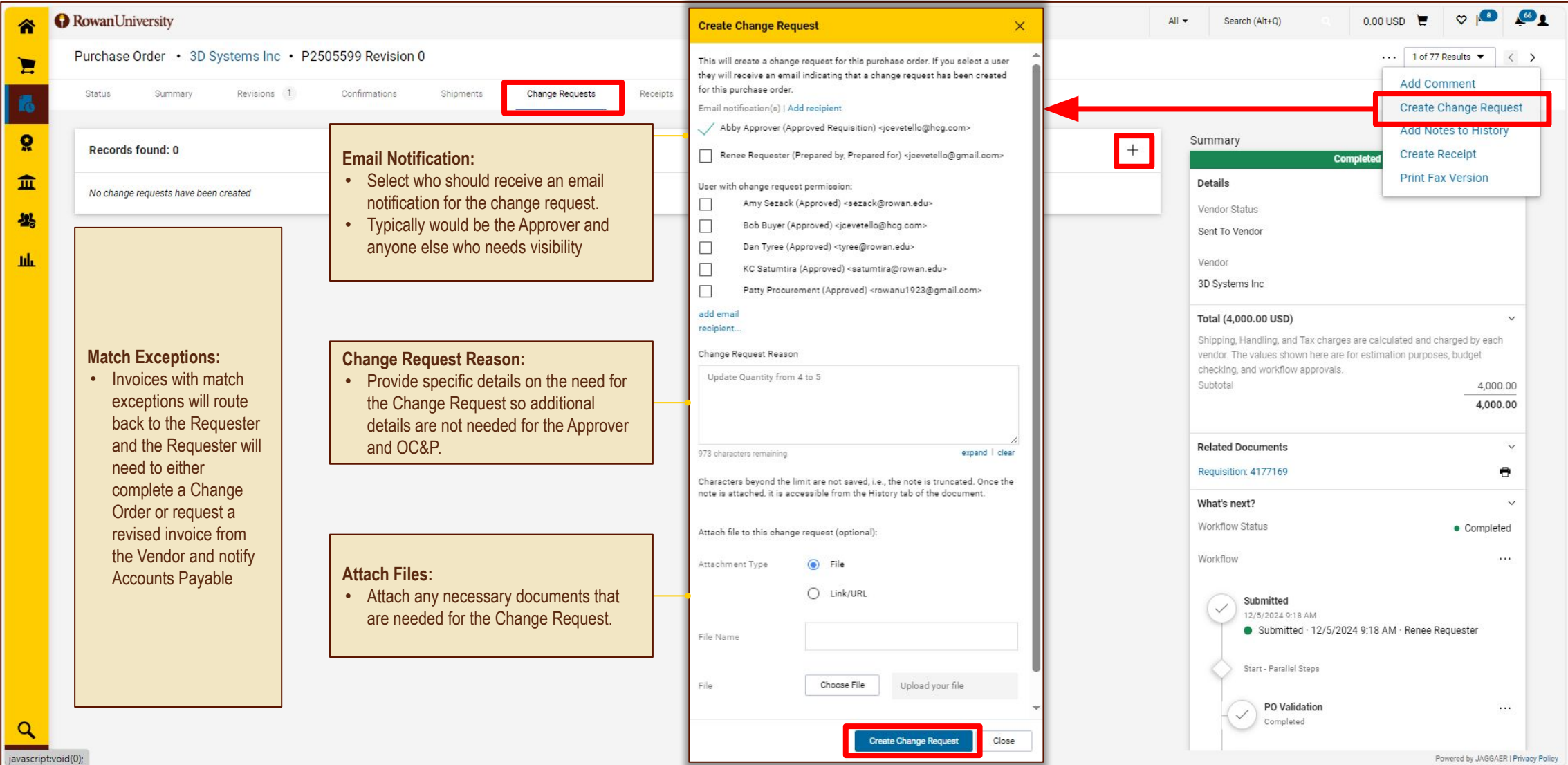
- **Assign Cart** – delegates the responsibility of reviewing and submitting the cart to a designated Requestor
- **Return to Cart** – Navigates you back to the Cart page
- **Copy to New Cart** – Copies all Cart details into a new Cart
- **Add Comment** – Adds a comment to the Cart for all users with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

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*.



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

Email Notification:

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

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.

Create Change Request Modal:

This will create a change request for this purchase order. If you select a user they will receive an email indicating that a change request has been created for this purchase order.

Email notification(s) | Add recipient

- ☒ Abby Approver (Approved Requisition) <jcevetello@hog.com>
- ☐ Renee Requester (Prepared by, Prepared for) <jcevetello@gmail.com>

User with change request permission:

- ☐ Amy Sezak (Approved) <sezak@rowan.edu>
- ☐ Bob Buyer (Approved) <jcevetello@hog.com>
- ☐ Dan Tyree (Approved) <tyree@rowan.edu>
- ☐ KC Satumtira (Approved) <satumtira@rowan.edu>
- ☐ Patty Procurement (Approved) <rowanu1923@gmail.com>

add email recipient...

Change Request Reason

Update Quantity from 4 to 5

973 characters remaining expand | clear

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

Attach file to this change request (optional):

Attachment Type

- ☒ File
- ☐ Link/URL

File Name

File

Choose File Upload your file

Create Change Request Close

Right Sidebar:

Summary

Completed

Details

Vendor Status

Sent To Vendor

Vendor

3D Systems Inc

Total (4,000.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each vendor. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal

4,000.00

4,000.00

Related Documents

Requisition: 4177169

What's next?

Workflow Status

Completed

Workflow

Submitted

12/5/2024 9:18 AM

Submitted · 12/5/2024 9:18 AM · Renee Requester

Start - Parallel Steps

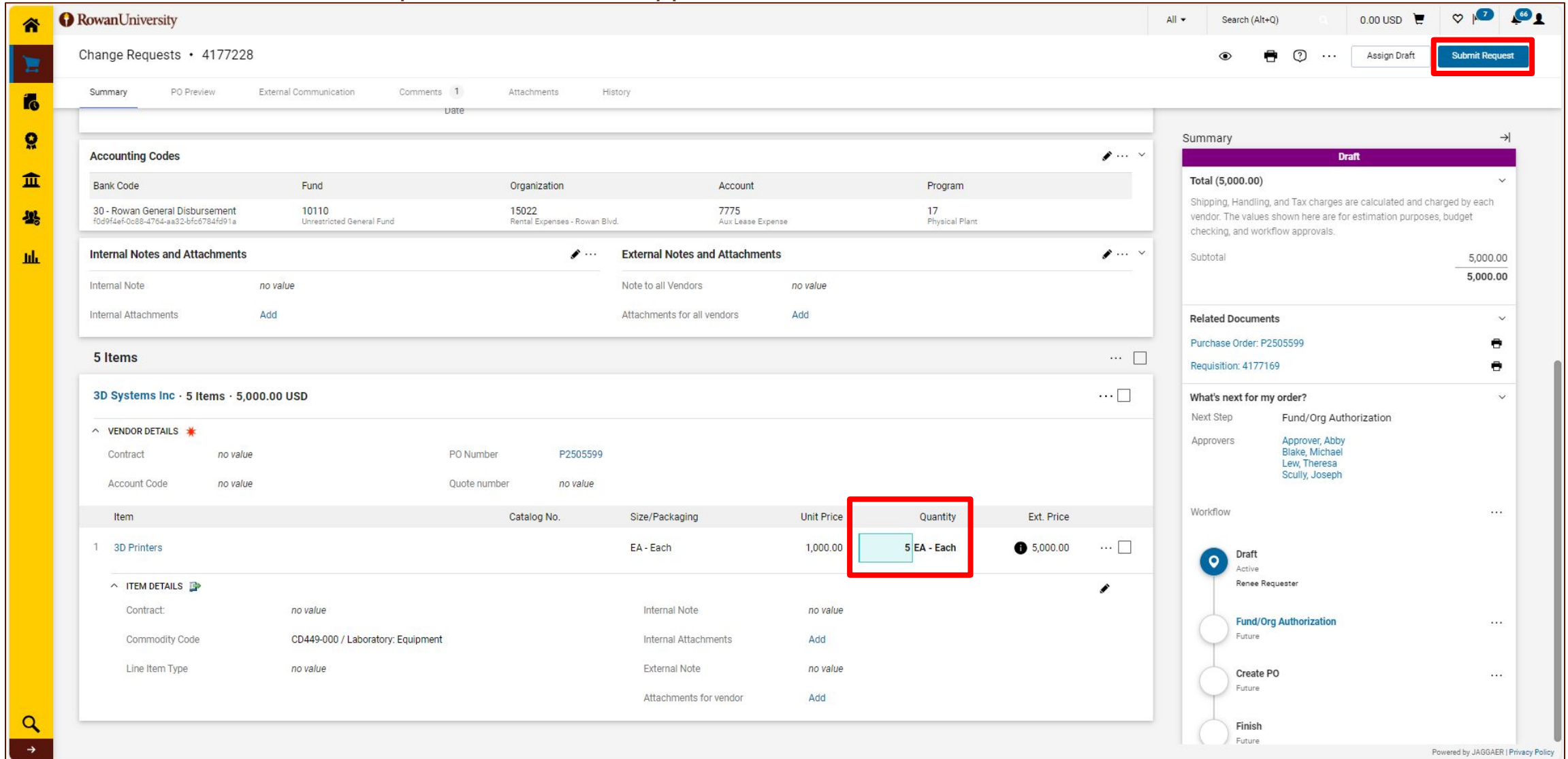
PO Validation

Completed

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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.



The screenshot displays the Rowan University Change Request interface for request 4177228. The page is divided into several sections:

- Header:** Includes the Rowan University logo, search bar, currency (0.00 USD), and notification icons.
- Change Requests • 4177228:** A breadcrumb trail and a list of tabs: Summary, PO Preview, External Communication, Comments (1), Attachments, and History.
- Accounting Codes:** A table with columns: Bank Code, Fund, Organization, Account, and Program.

Bank Code	Fund	Organization	Account	Program
30 - Rowan General Disbursement fd9f4ef-0c88-4764-aa32-bfc6784fd91a	10110 Unrestricted General Fund	15022 Rental Expenses - Rowan Blvd.	7775 Aux Lease Expense	17 Physical Plant
- Internal Notes and Attachments:** A section for adding internal notes and attachments.
- External Notes and Attachments:** A section for adding external notes and attachments.
- 5 Items:** A section for listing items, currently showing 5 items from 3D Systems Inc. for a total of 5,000.00 USD.

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 3D Printers		EA - Each	1,000.00	5 EA - Each	5,000.00
- Summary:** A sidebar on the right showing the draft status, total amount (5,000.00), subtotal (5,000.00), related documents (Purchase Order: P2505599, Requisition: 4177169), and a workflow diagram.

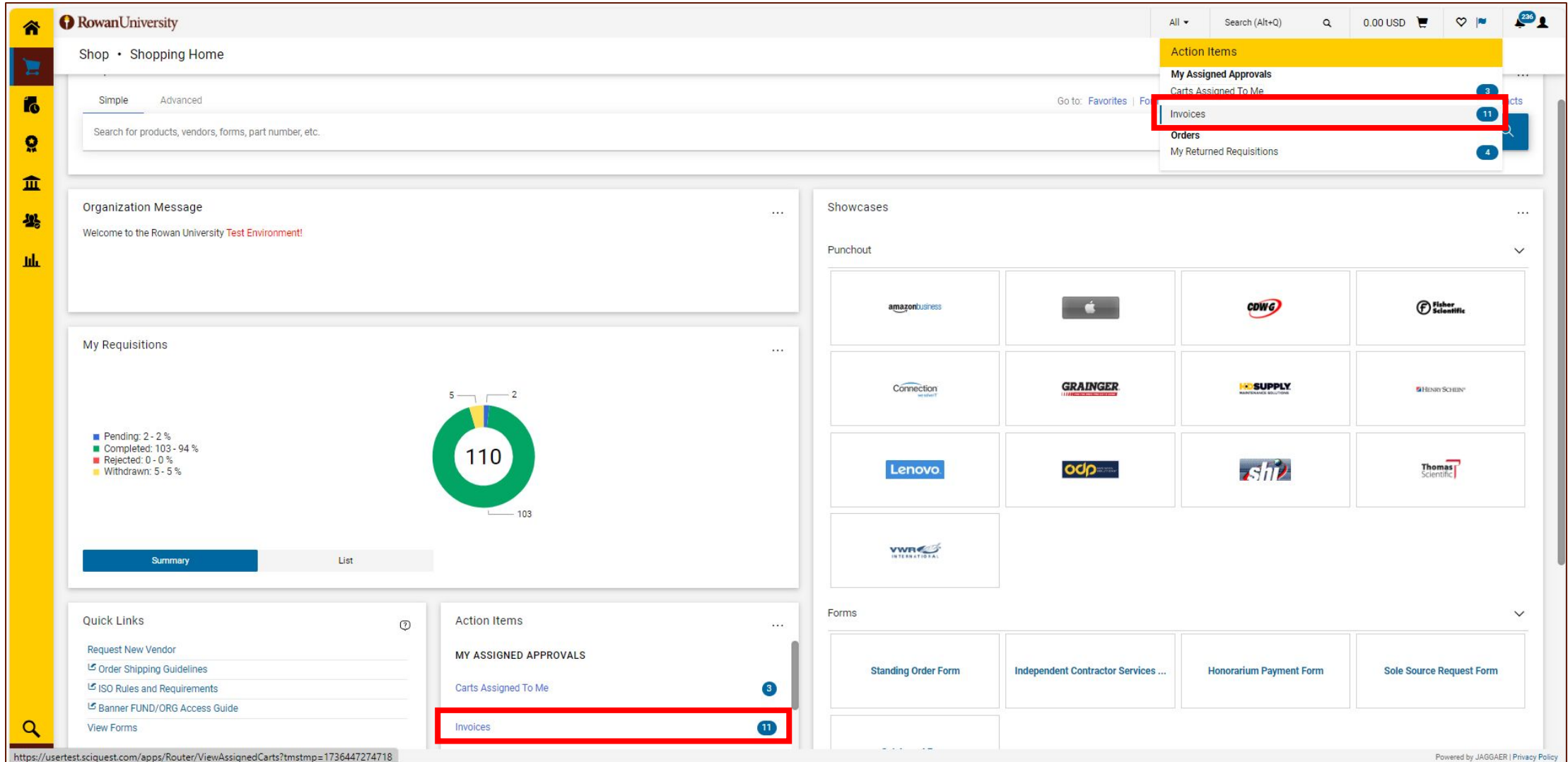
The **Submit Request** button is highlighted in red in the top right corner of the page.

Invoice Approval

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

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*.



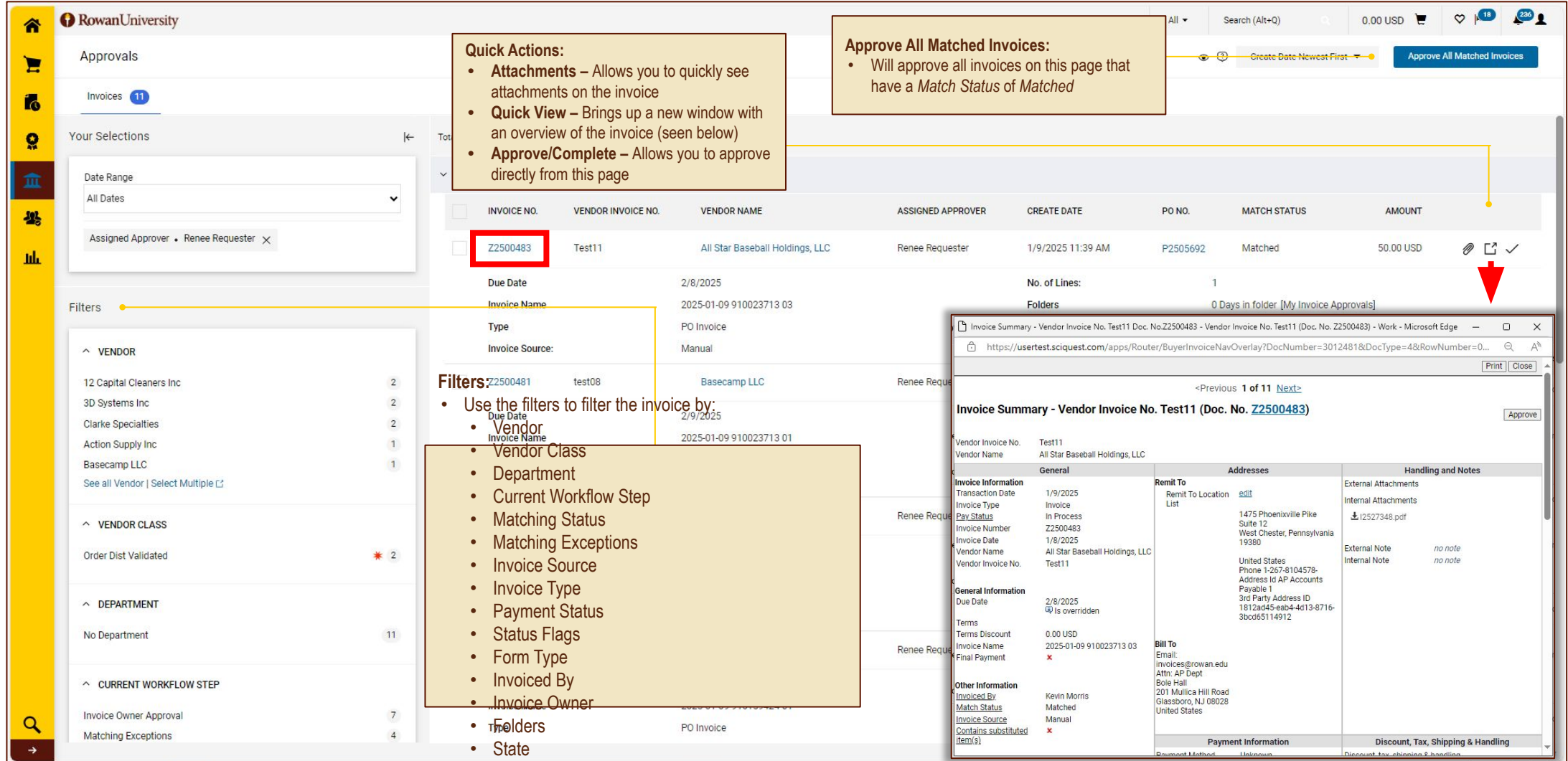
The screenshot displays the Rowan University procurement dashboard. The top navigation bar includes the Rowan University logo, a search bar, and a user profile icon. The main content area is divided into several sections:

- Organization Message:** A welcome message for the Rowan University Test Environment.
- My Requisitions:** A donut chart showing the status of requisitions: Pending (2 - 2%), Completed (103 - 94%), Rejected (0 - 0%), and Withdrawn (5 - 5%). The total count is 110.
- Quick Links:** A list of links for requesting new vendors, shipping guidelines, ISO rules, and access guides.
- Action Items:** A section titled "MY ASSIGNED APPROVALS" with a list of items: "Carts Assigned To Me" (3) and "Invoices" (11). The "Invoices" item is highlighted with a red box.
- Showcases:** A grid of vendor logos including Amazon Business, Apple, CDWG, Fisher Scientific, Connection, Grainger, Supply, Henry Schein, Lenovo, ODP, SHI, and Thomas Scientific.
- Forms:** A grid of forms including Standing Order Form, Independent Contractor Services, Honorary Payment Form, and Sole Source Request Form.

The URL at the bottom of the page is <https://usertest.sciquest.com/apps/Router/ViewAssignedCarts?tmstmp=1736447274718>.

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)



Rowan University

Approvals

Invoices **11**

Your Selections

Date Range: All Dates

Assigned Approver: Renee Requester

Quick Actions:

- Attachments** – Allows you to quickly see attachments on the invoice
- Quick View** – Brings up a new window with an overview of the invoice (seen below)
- Approve/Complete** – Allows you to approve directly from this page

Approve All Matched Invoices:

- Will approve all invoices on this page that have a *Match Status* of *Matched*

INVOICE NO.	VENDOR INVOICE NO.	VENDOR NAME	ASSIGNED APPROVER	CREATE DATE	PO NO.	MATCH STATUS	AMOUNT
Z2500483	Test11	All Star Baseball Holdings, LLC	Renee Requester	1/9/2025 11:39 AM	P2505692	Matched	50.00 USD

Filters:

- Use the filters to filter the invoice by:
 - Vendor
 - Vendor Class
 - Department
 - Current Workflow Step
 - Matching Status
 - Matching Exceptions
 - Invoice Source
 - Invoice Type
 - Payment Status
 - Status Flags
 - Form Type
 - Invoiced By
 - Invoice Owner
 - Folders
 - State

Invoice Summary - Vendor Invoice No. Test11 (Doc. No. Z2500483)

Vendor Invoice No. Test11
Vendor Name All Star Baseball Holdings, LLC

General	Addresses	Handling and Notes
Invoice Information Transaction Date 1/9/2025 Invoice Type Invoice Pay Status In Process Invoice Number Z2500483 Invoice Date 1/8/2025 Vendor Name All Star Baseball Holdings, LLC Vendor Invoice No. Test11 General Information Due Date 2/8/2025 Is overridden Terms Terms Discount 0.00 USD Invoice Name 2025-01-09 910023713 03 Final Payment Other Information Invoiced By Kevin Morris Match Status Matched Invoice Source Manual Contains substituted item(s)	Remit To Remit To Location List 1475 Phoenixville Pike Suite 12 West Chester, Pennsylvania 19380 United States Phone 1-267-8104578- Address ID AP Accounts Payable 1 3rd Party Address ID 1812a045-ea04-4d13-8716-3bcd65114912 Bill To Email: invoices@rowan.edu Attn: AP Dept Bole Hall 201 Mullica Hill Road Glassboro, NJ 08028 United States	External Attachments Internal Attachments 12527348.pdf External Note no note Internal Note no note
Payment Information Payment Method Unknown	Discount, Tax, Shipping & Handling Discount tax shipping & handling	

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.

Invoice • All Star Baseball Holdings,... • Z2500483
Approval Actions:

General

Invoice Information

Transaction Date	1/9/2025
Invoice Type	Invoice
Pay Status	In Process
Invoice Number	Z2500483
Invoice Date	1/8/2025
Vendor Name	All Star Baseball Holdings, LLC
Vendor Invoice No.	Test11

General Information

Due Date	2/8/2025 <small>Is overridden</small>
Terms	
Terms Discount	0.00 USD
Invoice Name	2025-01-09 910023713 03
Final Payment	✗

Other Information

Invoiced By	Kevin Morris
Match Status	Matched
Invoice Source	Manual
Contains substituted	✗

Addresses

Remit To

1475 Phoenixville Pike
Suite 12
West Chester, Pennsylvania 19380

United States
Phone 1-267-8104578-
Address Id AP Accounts Payable 1
3rd Party Address ID 1812ad45-eab4-4d13-8716-3bcd6511491

Bill To

Email: invoices@rowan.edu
Attn: AP Dept
Bole Hall
201 Mullica Hill Road
Glassboro, NJ 08028
United States

Payment Information

Payment Method	Unknown
Payment Record No.	no value
Payment Record Date	no value

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
Total	50.00 USD	

Summary

Pending

All Star Baseball Holdings, LLC

Vendor Invoice No. ...

Total (50.00 USD)	
Subtotal	50.00
Discount	0.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
Total	50.00

Related Documents

- Purchase Order: P2505692
- Requisition: 4189023

What's next?

Workflow

- Submitted**
1/9/2025 11:43 AM
Submitted - 1/9/2025 11:43 AM · Kevin Morris
- Invoice Owner Approval**
Pending - Renee Requester
- OK to Pay**
Future
- Delay Workflow**
Future

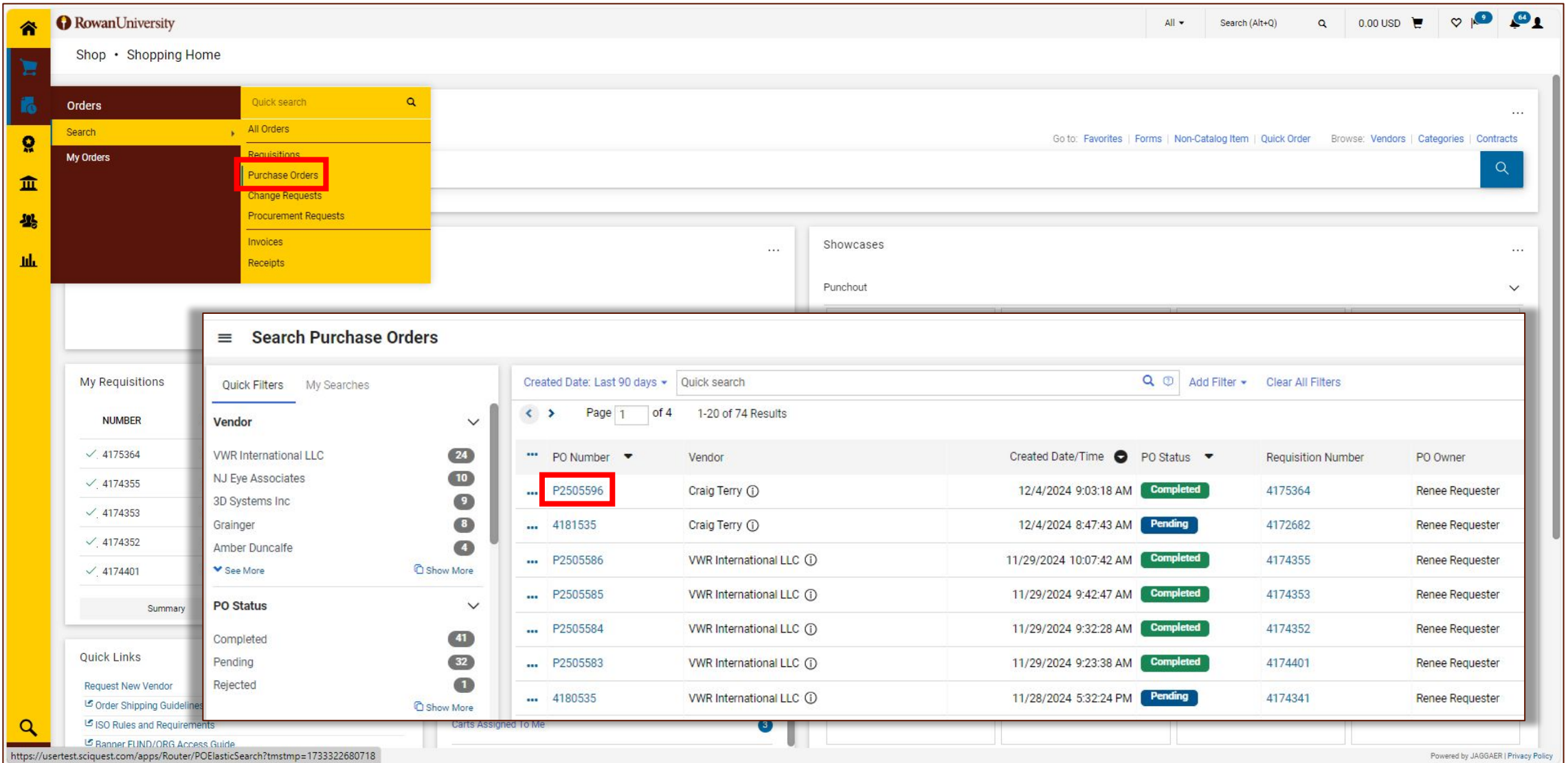
Receiving

(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.



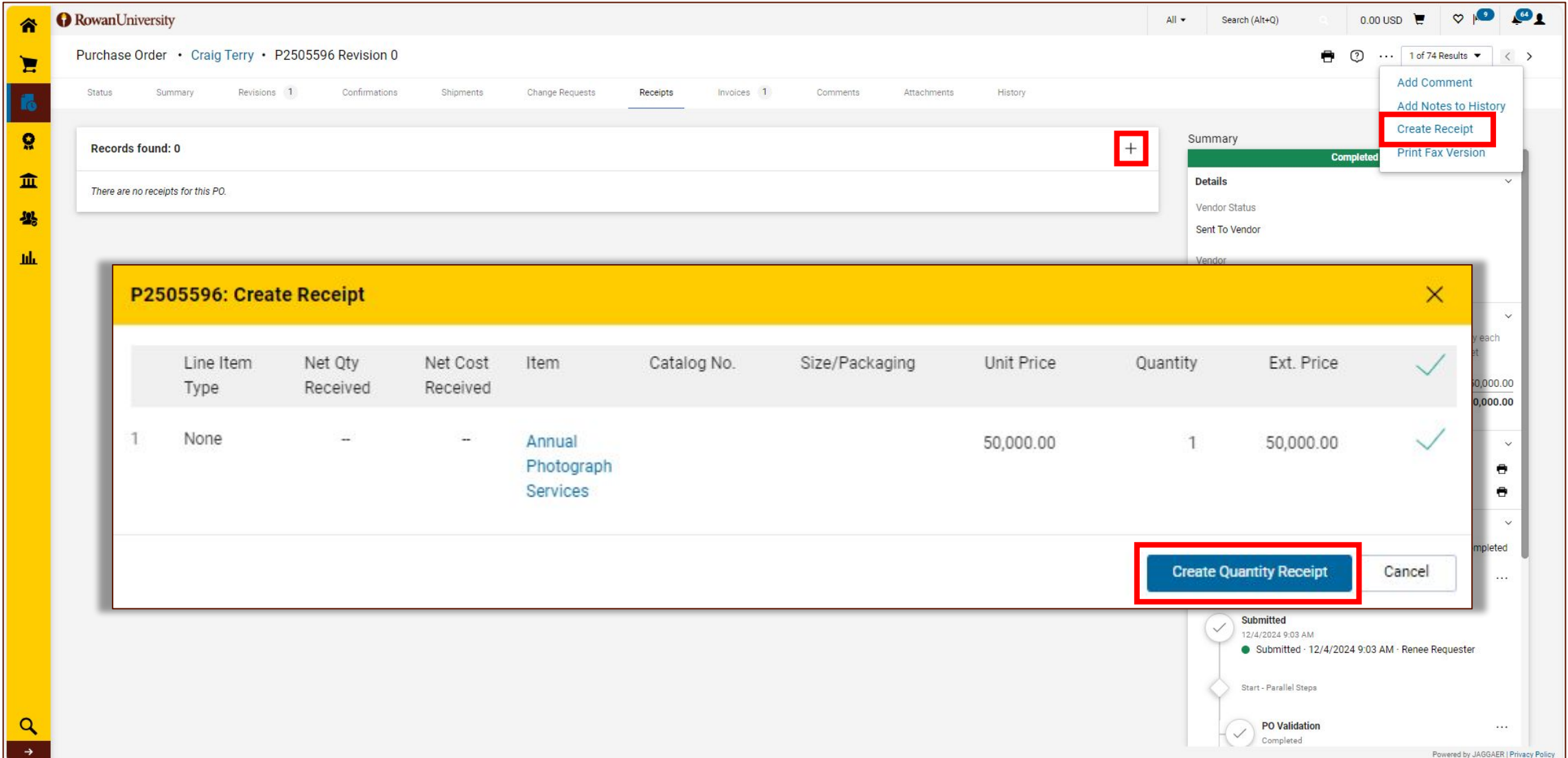
The screenshot shows the Rowan University procurement system interface. The navigation path is: Orders > My Orders > My Purchase Orders. The 'Purchase Orders' link is highlighted in the 'My Orders' dropdown menu. Below this, a 'Search Purchase Orders' modal is open, displaying a list of search results. The 'PO Number' column is highlighted, and the PO number 'P2505596' is selected. The table shows the following data:

PO Number	Vendor	Created Date/Time	PO Status	Requisition Number	PO Owner
P2505596	Craig Terry	12/4/2024 9:03:18 AM	Completed	4175364	Renee Requester
4181535	Craig Terry	12/4/2024 8:47:43 AM	Pending	4172682	Renee Requester
P2505586	VWR International LLC	11/29/2024 10:07:42 AM	Completed	4174355	Renee Requester
P2505585	VWR International LLC	11/29/2024 9:42:47 AM	Completed	4174353	Renee Requester
P2505584	VWR International LLC	11/29/2024 9:32:28 AM	Completed	4174352	Renee Requester
P2505583	VWR International LLC	11/29/2024 9:23:38 AM	Completed	4174401	Renee Requester
4180535	VWR International LLC	11/28/2024 5:32:24 PM	Pending	4174341	Renee Requester

The bottom of the page shows the URL: <https://usertest.scquest.com/apps/Router/POElasticSearch?tmstmp=1733322680718> and the text 'Powered by JAGGAER | Privacy Policy'.

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*.










The screenshot displays the Rowan University procurement system interface. At the top, the header shows 'Purchase Order • Craig Terry • P2505596 Revision 0'. The 'Receipts' tab is selected, showing 'Records found: 0' and a '+ ' icon in a red box. A modal window titled 'P2505596: Create Receipt' is open, displaying a table with one line item:

Line Item	Type	Net Qty Received	Net Cost Received	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	None	--	--	Annual Photograph Services			50,000.00	1	50,000.00	✓

At the bottom of the modal, the 'Create Quantity Receipt' button is highlighted with a red box, next to a 'Cancel' button. On the right side of the main interface, a dropdown menu is open, showing options: 'Add Comment', 'Add Notes to History', 'Create Receipt' (highlighted with a red box), and 'Print Fax Version'. The bottom right corner shows a status bar with 'Submitted' and 'PO Validation Completed'.

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.

RowanUniversity

All
Search (Alt+Q)
0.00 USD
9
64

Quantity Receipt • 680460


Save Updates
Complete

Summary
Comments
Attachments
History

Receipt Purpose
no value

Receipt Name
2024-12-04 requester 01

Receipt No
To Be Assigned

Receipt Date
12/4/2024

Packing Slip No.

Vendor Name
Craig Terry

Received by
Renee Requester

Receipt Address

Attn: Susie Shopper
Bldg./Rm 2
Science Center
2 Medical Center Drive
Stratford, NJ 08084
United States

Carrier
Other

Attachments
Add

Notes
1000 characters remaining

Change Order:

- If the quantity received does not match the amount invoiced then a Change Order will be needed

Summary
Draft

Details

Creation Date
12/4/2024 9:34:36 AM

Source
Manual

Vendor
Craig Terry

Received by
Renee Requester

Total (50,000.00 USD)

Subtotal
50,000.00
50,000.00

Related Documents

Purchase Order: P2505596

PO • P2505596




Line	Item	Catalog No.	Qty/UOM Ordered	Quantity	Status
------	------	-------------	-----------------	----------	--------

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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.

Quantity Receipt • 680460

Summary Comments Attachments History

Attn: Susie Shopper
Bldg./Rm 2
Science Center
2 Medical Center Drive
Stratford, NJ 08084
United States

Invoice Completion:

- Invoices will not move to complete status to feed to Banner for payment processing until receiving has been completed.

PO • P2505596

Line	Item	Catalog No.	Qty/UOM Ordered	Quantity	Status
1	Annual Photography Services		1	1	Received

ITEM DETAILS

Contract No. no value

Line Item Type no value

Flex Field 2

Attachments Add

Notes

1000 characters remaining

Status:

- Received** – Good/Service has been received
- Returned** – Good will be returned to the vendor
- Cancelled** – Good/Service should be cancelled

Drop Down:

- Complete** – will complete the receipt
- Add PO** – will add a new PO to the receipt
- Delete** – will delete the created receipt

Save Updates Complete

Complete

Add PO

Delete

Summary Details

Creation Date 2024 9:34:36 AM

Source Manual

Vendor Craig Terry

Received by Renee Requester

Total (50,000)

Subtotal 50,000.00

50,000.00

Related Docs

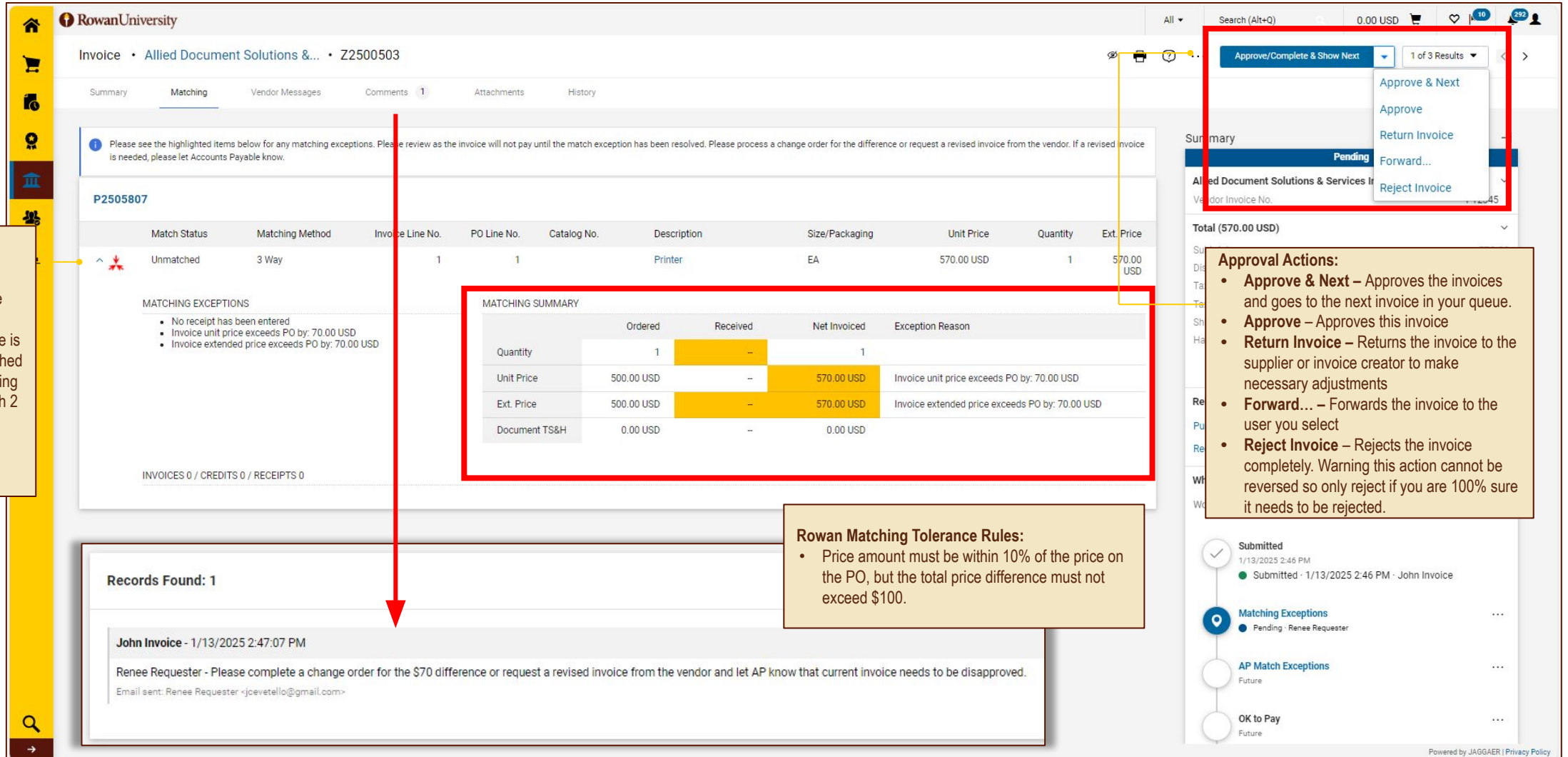
Purchase Order: P2505596

Match Exceptions

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

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.

Matching Summary Table:

	Ordered	Received	Net Invoiced	Exception Reason
Quantity	1	--	1	
Unit Price	500.00 USD	--	570.00 USD	Invoice unit price exceeds PO by: 70.00 USD
Ext. Price	500.00 USD	--	570.00 USD	Invoice extended price exceeds PO by: 70.00 USD
Document TS&H	0.00 USD	--	0.00 USD	

Comments:

John Invoice - 1/13/2025 2:47:07 PM

Renee Requester - Please complete a change order for the \$70 difference or request a revised invoice from the vendor and let AP know that current invoice needs to be disapproved.

Email sent: Renee Requester <joevetello@gmail.com>