Campus Shopper Guide
Rowan ProConnect

Campus Shopper Overview

How to Shop and Create Carts in Rowan ProConnect

As a Shopper, you will shop for goods or services you need, create a cart with your items, and assign the cart to the correct Requester.

The Shopper has the ability to shop for goods and services in a variety of ways. You can shop for goods using punchout catalogs or non-catalog forms and you can shop for services through the forms as well. Once you have found your items in a catalog or completed a form this will create a shopping cart where a lot of the information populates automatically based off of the items and pre-configured set up of your profile, but you will then enter missing information such as the Shipping address and Accounting Codes. Once you have completed all required information you will assign the cart to a Requisitioner.

This reference guide is intended to illustrate the process of shopping for goods and services and provide commentary.

Best Practices

- Use Punchout Catalogs for pre-approved and negotiated pricing to help save money and streamline the process.

- When using a form for goods or services include as much detail as possible including accurate descriptions, correct supplier names, quantities, any necessary supporting information, etc. as detailed carts help requesters and approvers understand your needs.

- To ensure your order moves quickly through the system assign your carts promptly to the appropriate requester.

- After submitting a Cart, check the status of your Cart from any screen, by clicking on the Shopping icon and browsing to My Carts and Orders > View Carts.

- Add routinely ordered items to a favorites folder for quick re-ordering.

- Add comments and attachments to your draft requisition that will be visible to the Requisitioner once you have assigned the cart.

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.

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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.) or Default User Settings (Account Code Defaults and Default Addresses).

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.
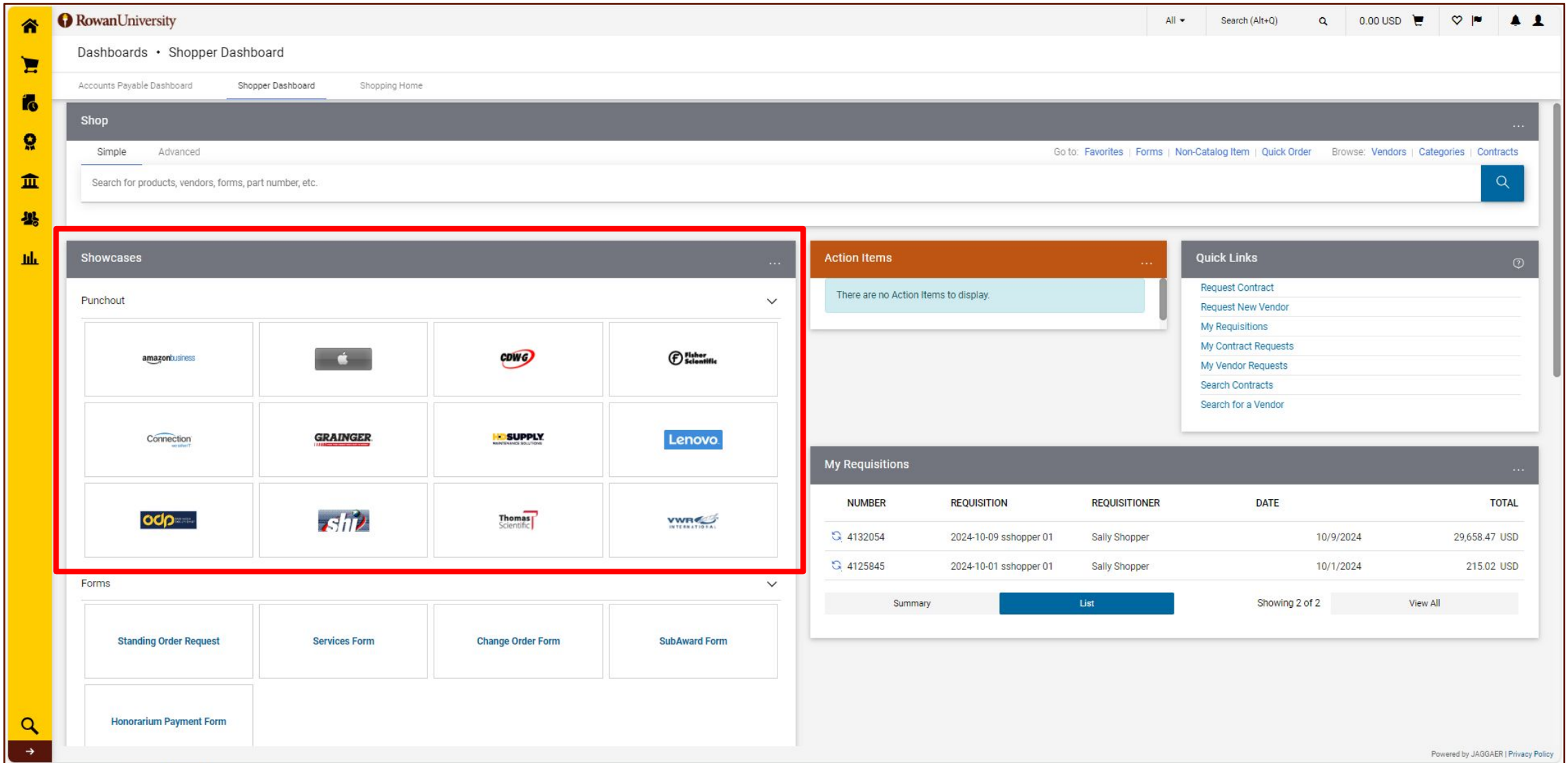
Shopper Dashboard

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

Showcases:
Shop for items or services using:
- Punchout Catalogs
- Forms

Action Items:
- Items awaiting your action will display here such as unassigned carts, incomplete carts, and incomplete requests.

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

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

Step by Step

1a. Shopping Punchout Catalog - From the Shopper Dashboard navigate to the *Showcases* section and select your Punchout vendor tile. This will redirect you to the vendor's site.

Step by Step

1a. Shopping Punchout Catalog (Continued) - Search for and add items to the cart. Once all items have been added to the cart select *Submit Cart* to return the cart to ProConnect.

Vendor Sites:
- Every Vendor's site will look slightly different, but operate in a very similar manner.

Step by Step

1b. Shopping via Form - From the Shopper Dashboard navigate to the *Showcases* section and select your Form depending on your need (Standing Order Request, Services Form, Change Order Form, SubAward Form, Honorarium Payment Form)

Step by Step

1b. Shopping via Form (Continued) - Each form will have different information to complete, but will be filled out in the same manner by completing all required information and selecting *Add And Go To Cart.*

Adding Vendor:
- Search for Vendors by typing and by selecting the *Eyeglass* icon to expand the search and select a Vendor.

Step by Step

2. Complete Cart Information - Ensure all items and details are correct. Select *Assign Cart* or *Proceed to Checkout.*

Assign Cart or Proceed To Checkout:
- You have the ability to assign the cart from this page or proceed to the requisition and make any updates necessary. Users with Shopper roles will not have the ability to update accounting information.

Commodity Code:
- Update the Commodity Code if needed by selecting the eyeglass icon and searching for a new commodity code.
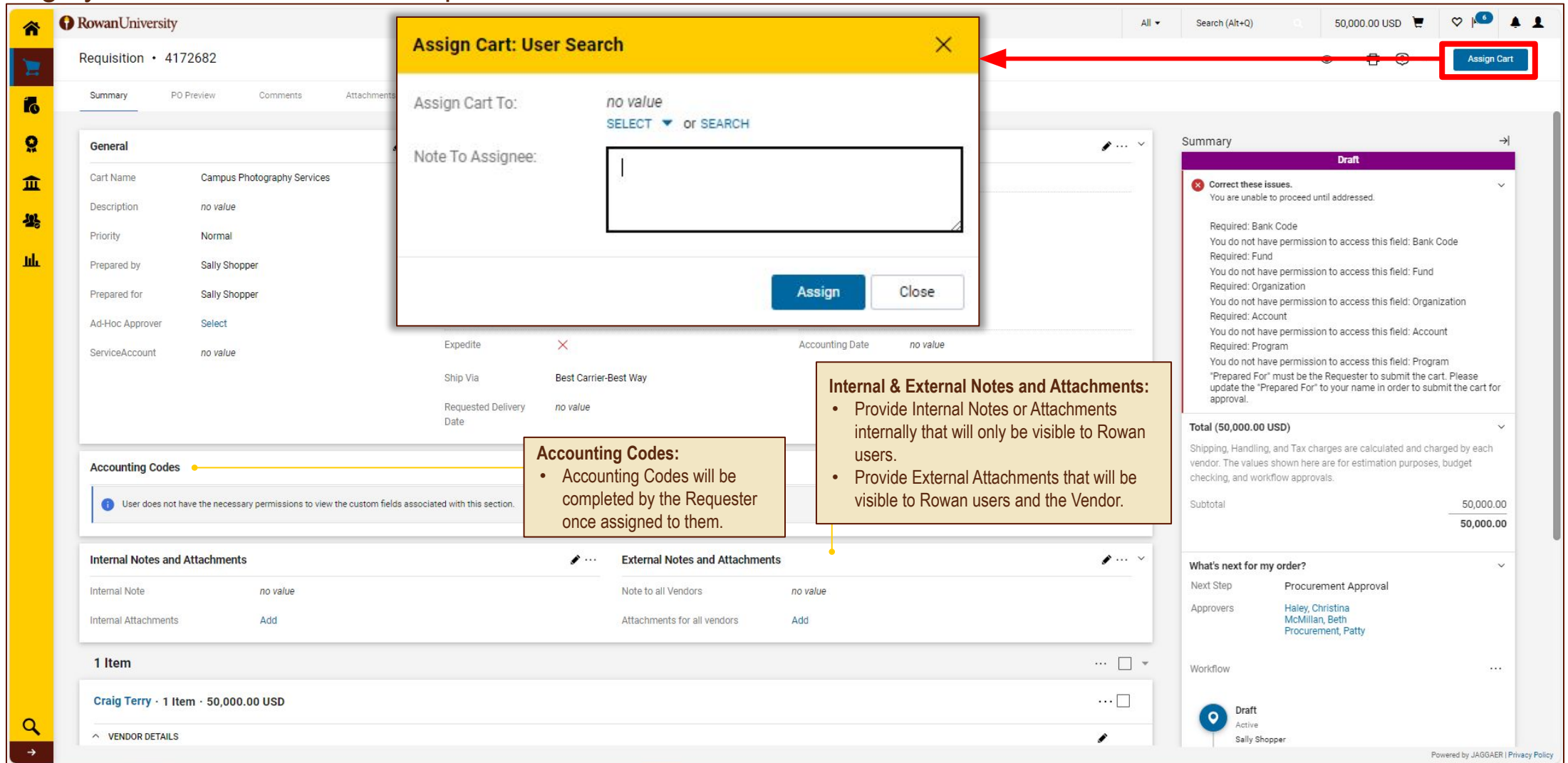
Cart Name:
- Your Cart will auto generate a cart name, but you have the ability to rename your Cart. If renaming your cart provide details that will be beneficial for the Requester to recognize what is being purchased.

Step by Step

3. Update Requisition Information - Update all required information on the requisition including General, Shipping, Billing, Notes, Attachments and Item information (information will auto populate based on your profile and the item or service details). Assign your cart to the correct Requster.

Step by Step

4. Assign Cart – Update Select *Assign Cart,* search for and select a user, then select *Assign*. You have the ability to optionally leave a note to the assignee.