



# RowanUniversity

## **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.*

# 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



## Creating Favorites

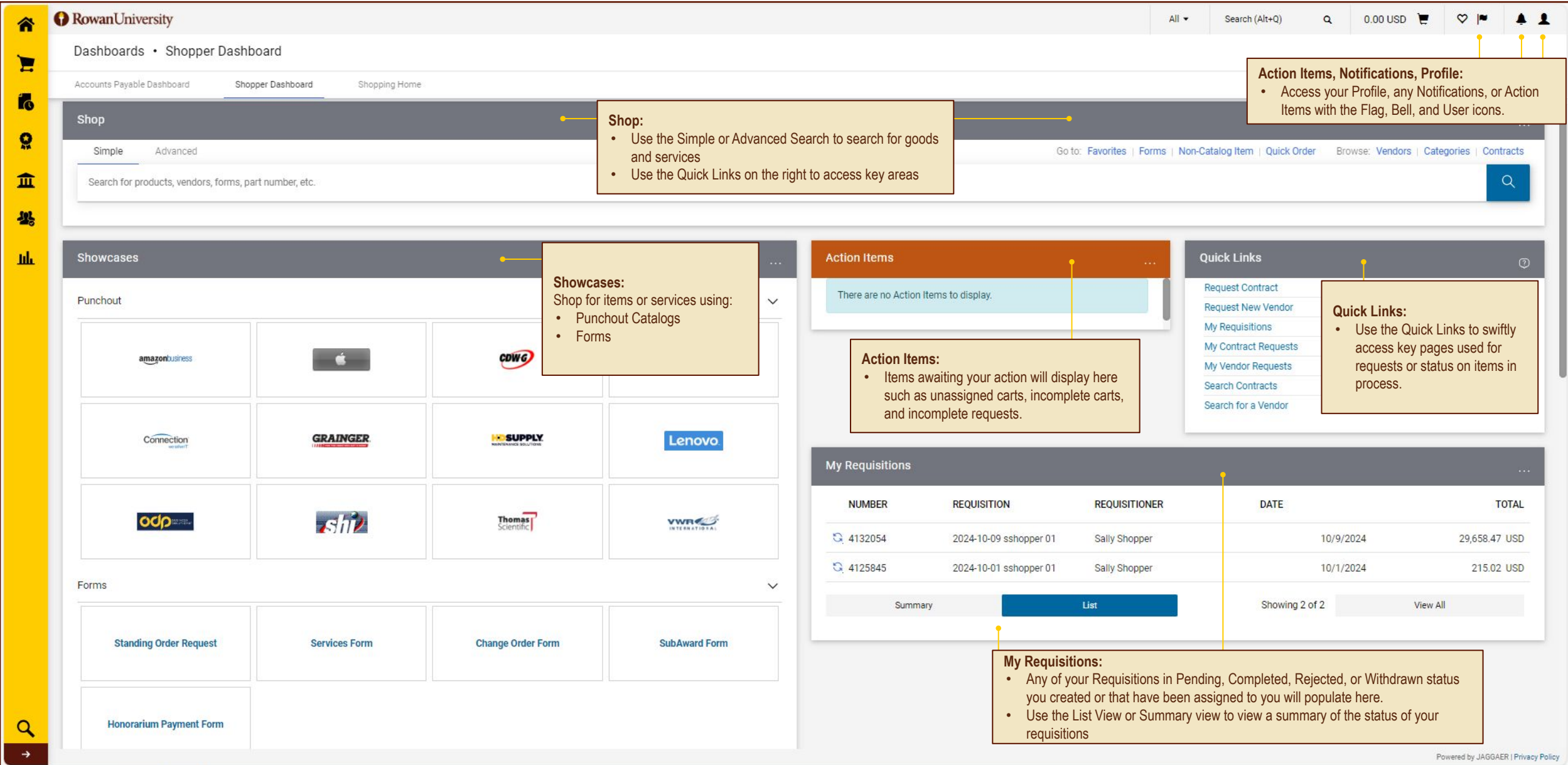
- Add routinely ordered items to a favorites folder for quick re-ordering. Only hosted and form items are eligible.
- Search for items. Select the heart icon located in the top right corner of the item
- Edit the Item Nickname and Quantity and add an optional Description. The correct product name will display on the requisition and purchase order to the supplier.
- Select the Destination Folder and click Submit. Select Create New to create a new folder to store favorited items in. A message will appear noting the product has been added to your Favorites.



## 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



**Rowan University** | All | Search (Alt+Q) | 0.00 USD | Profile | Notifications | Action Items

Dashboards • Shopper Dashboard

Accounts Payable Dashboard | **Shopper Dashboard** | Shopping Home

**Shop**

Simple | Advanced

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

Go to: [Favorites](#) | [Forms](#) | [Non-Catalog Item](#) | [Quick Order](#) | Browse: [Vendors](#) | [Categories](#) | [Contracts](#)

**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**

Punchout

Shop for items or services using:

- Punchout Catalogs
- Forms

**Action Items**

There are no Action Items to display.

**Action Items:**

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

**Quick Links**

- [Request Contract](#)
- [Request New Vendor](#)
- [My Requisitions](#)
- [My Contract Requests](#)
- [My Vendor Requests](#)
- [Search Contracts](#)
- [Search for a Vendor](#)

**Quick Links:**

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

**My Requisitions**

NUMBER	REQUISITION	REQUISITIONER	DATE	TOTAL
<a href="#">4132054</a>	2024-10-09 sshopper 01	Sally Shopper	10/9/2024	29,658.47 USD
<a href="#">4125845</a>	2024-10-01 sshopper 01	Sally Shopper	10/1/2024	215.02 USD

Summary | **List** | Showing 2 of 2 | [View All](#)

**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

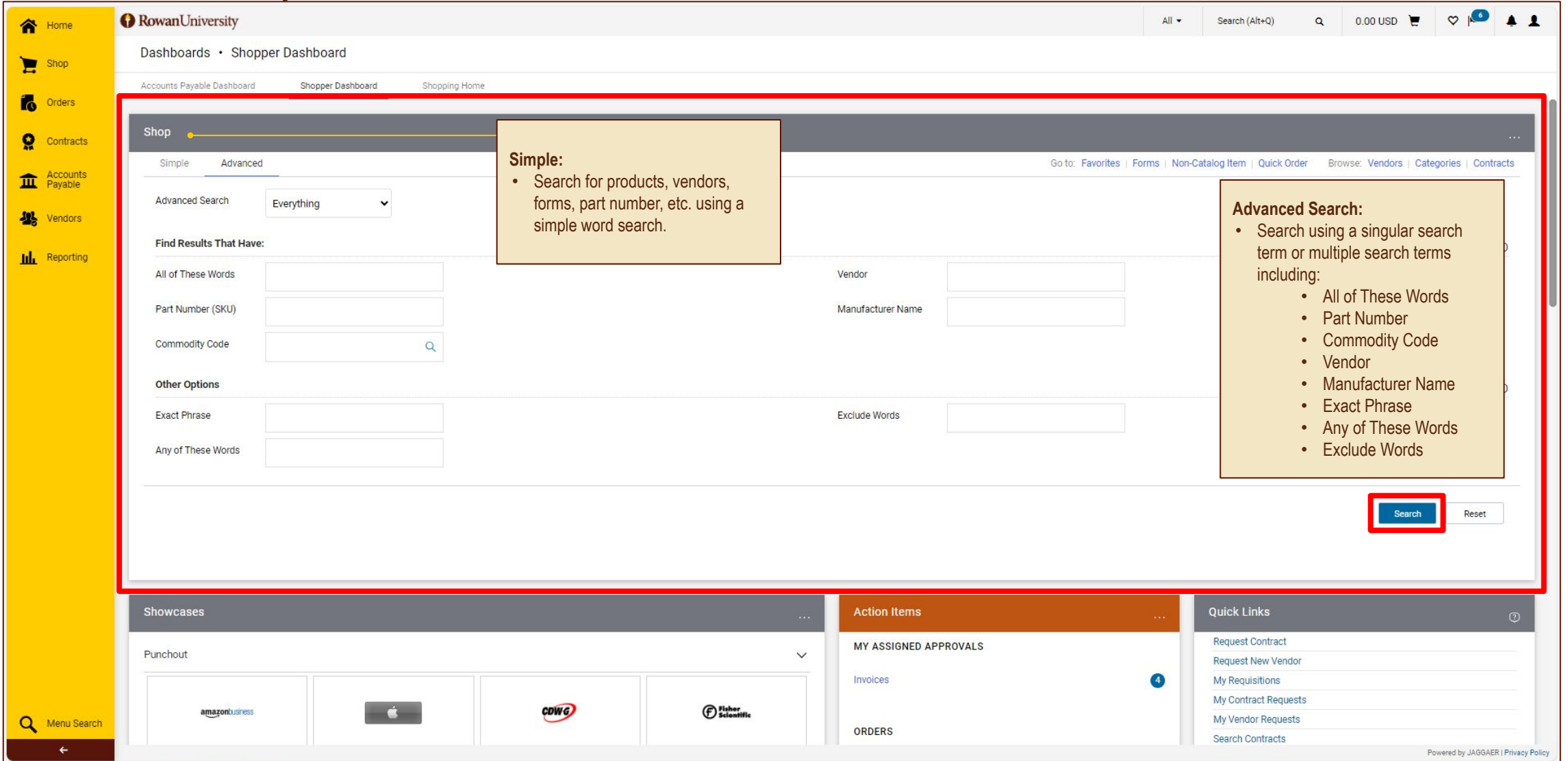
Standing Order Request | Services Form | Change Order Form | SubAward Form

Honorarium Payment Form

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# Step by Step

**1a. Shopping using Search** - From the Shopper Dashboard navigate to the *Shop* section and use the *Simple* or *Advanced* Search to search for your item.



The screenshot shows the Rowan University Shopper Dashboard. The 'Shop' section is highlighted with a red border. The search interface includes a 'Simple' search option and an 'Advanced Search' section. The 'Advanced Search' section has a dropdown menu set to 'Everything' and several input fields for search criteria.

**Simple:**

- Search for products, vendors, forms, part number, etc. using a simple word search.

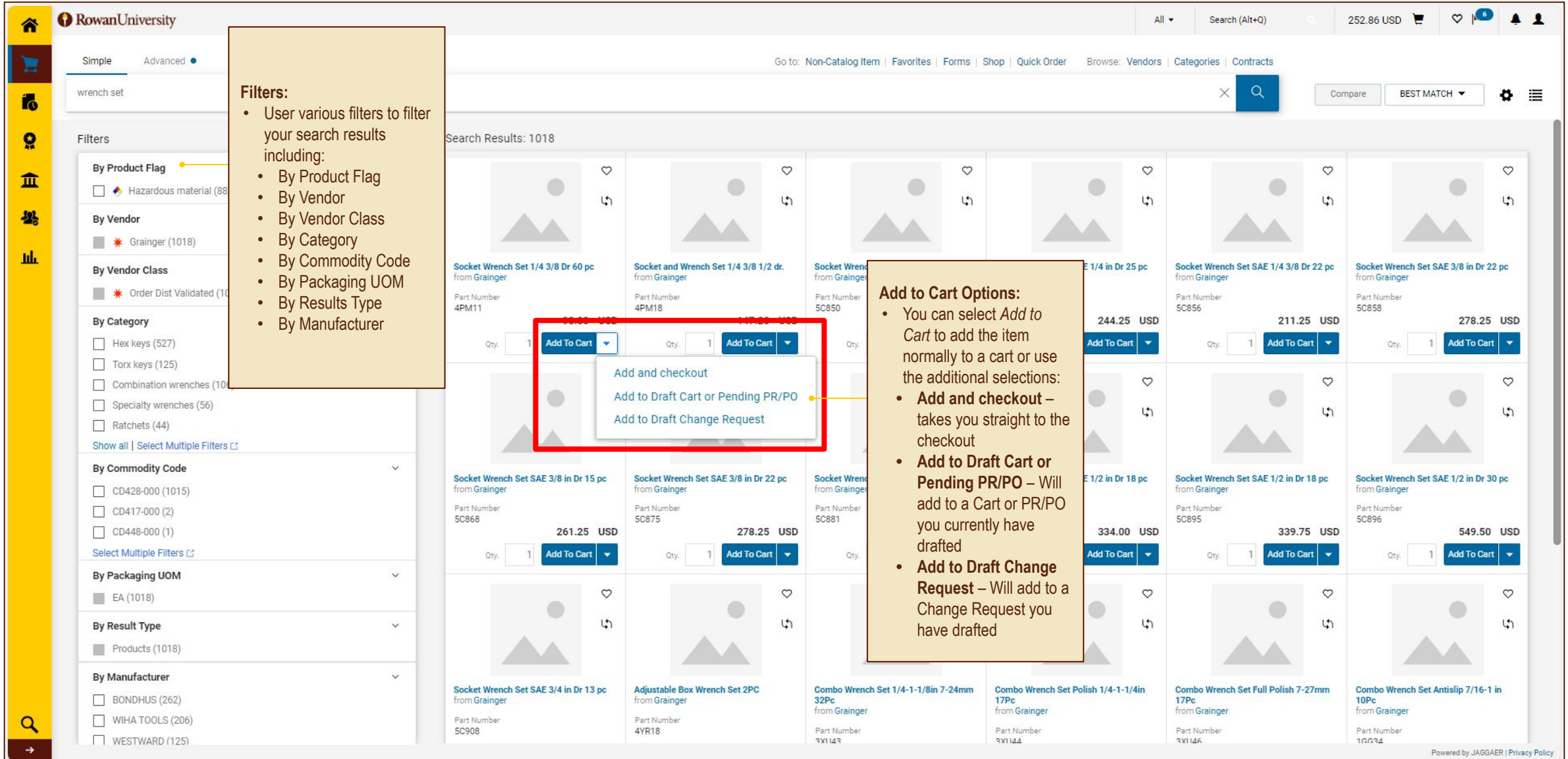
**Advanced Search:**

- Search using a singular search term or multiple search terms including:
  - All of These Words
  - Part Number
  - Commodity Code
  - Vendor
  - Manufacturer Name
  - Exact Phrase
  - Any of These Words
  - Exclude Words

The 'Search' button is highlighted with a red box.

# Step by Step

1a. Shopping using Search - From your search results select the item you are looking for and *Add To Cart*.



The screenshot shows a search results page for 'wrench set' with 1018 results. The left sidebar contains various filter categories such as Product Flag, Vendor, Vendor Class, Category, Commodity Code, Packaging UOM, Result Type, and Manufacturer. A red box highlights the 'Add To Cart' dropdown menu for a specific item, which has opened to show three options: 'Add and checkout', 'Add to Draft Cart or Pending PR/PO', and 'Add to Draft Change Request'. A yellow callout box explains the 'Add to Cart Options'.

**Filters:**

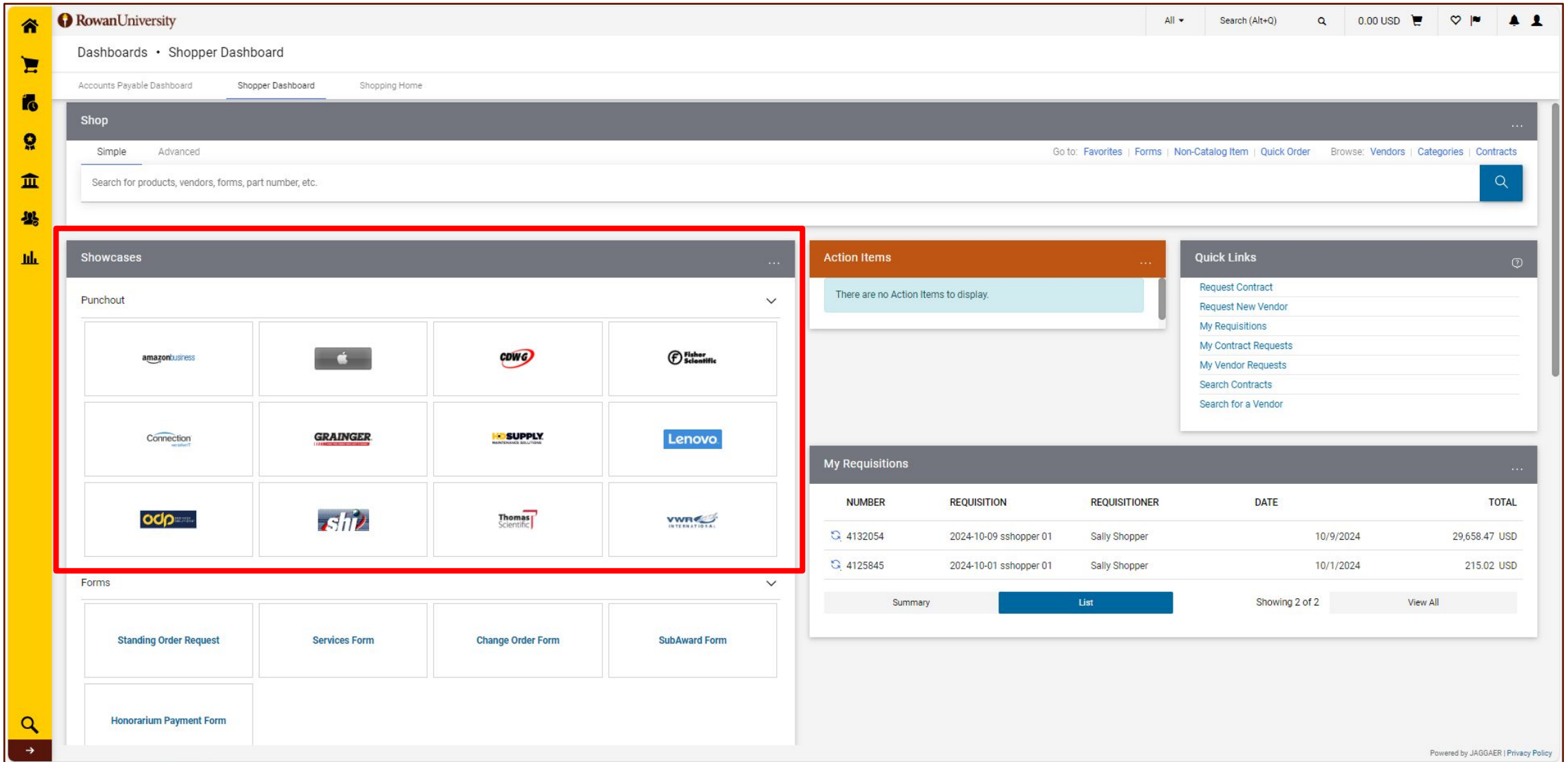
- User various filters to filter your search results including:
  - By Product Flag
  - By Vendor
  - By Vendor Class
  - By Category
  - By Commodity Code
  - By Packaging UOM
  - By Results Type
  - By Manufacturer

**Add to Cart Options:**

- You can select *Add to Cart* to add the item normally to a cart or use the additional selections:
  - **Add and checkout** – takes you straight to the checkout
  - **Add to Draft Cart or Pending PR/PO** – Will add to a Cart or PR/PO you currently have drafted
  - **Add to Draft Change Request** – Will add to a Change Request you have drafted

# Step by Step

**1b. 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.



The screenshot shows the Rowan University Shopper Dashboard. The 'Showcases' section is highlighted with a red box and contains a 'Punchout' category with the following vendor tiles:

- amazon business
- Apple
- CDWG
- Fisher Scientific
- Connection
- GRAINGER
- HS SUPPLY
- Lenovo
- odp
- shi
- Thomas Scientific
- VWR INTERNATIONAL

Below the Showcases section, there are 'Forms' including:

- Standing Order Request
- Services Form
- Change Order Form
- SubAward Form
- Honorarium Payment Form

On the right side of the dashboard, there are sections for 'Action Items' (displaying 'There are no Action Items to display.'), 'Quick Links' (Request Contract, Request New Vendor, My Requisitions, My Contract Requests, My Vendor Requests, Search Contracts, Search for a Vendor), and 'My Requisitions' table.

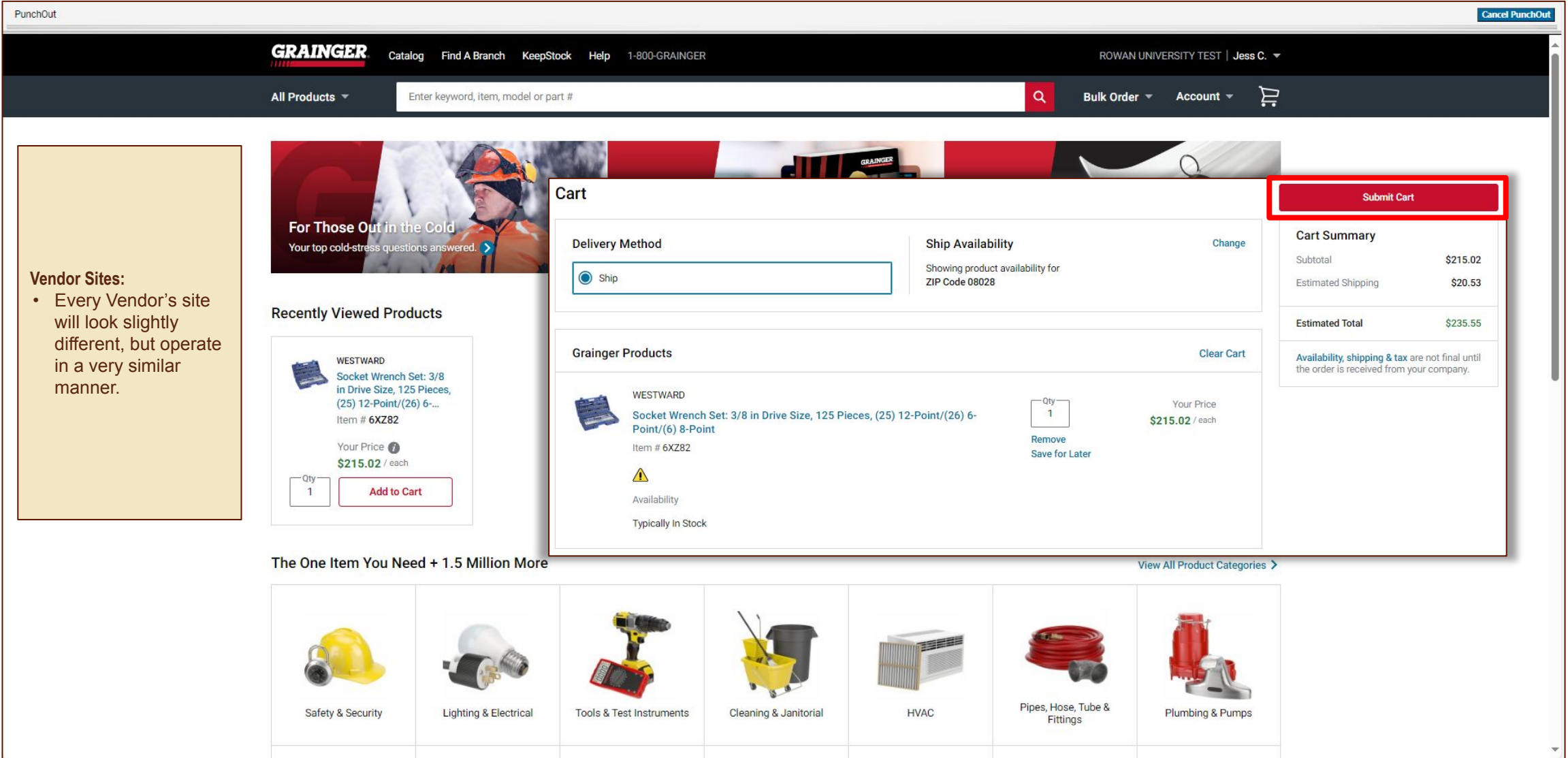
NUMBER	REQUISITION	REQUISITIONER	DATE	TOTAL
4132054	2024-10-09 sshopper 01	Sally Shopper	10/9/2024	29,658.47 USD
4125845	2024-10-01 sshopper 01	Sally Shopper	10/1/2024	215.02 USD

At the bottom right, there is a footer: 'Powered by JAGGAER | Privacy Policy'.



# Step by Step

1b. 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.



The screenshot shows the Grainger website interface. At the top, there is a navigation bar with the Grainger logo, a search bar, and links for 'Catalog', 'Find A Branch', 'KeepStock', 'Help', and '1-800-GRAINGER'. The user is logged in as 'ROWAN UNIVERSITY TEST | Jess C.'. Below the navigation bar, there is a 'PunchOut' header with a 'Cancel PunchOut' button. The main content area is divided into several sections:

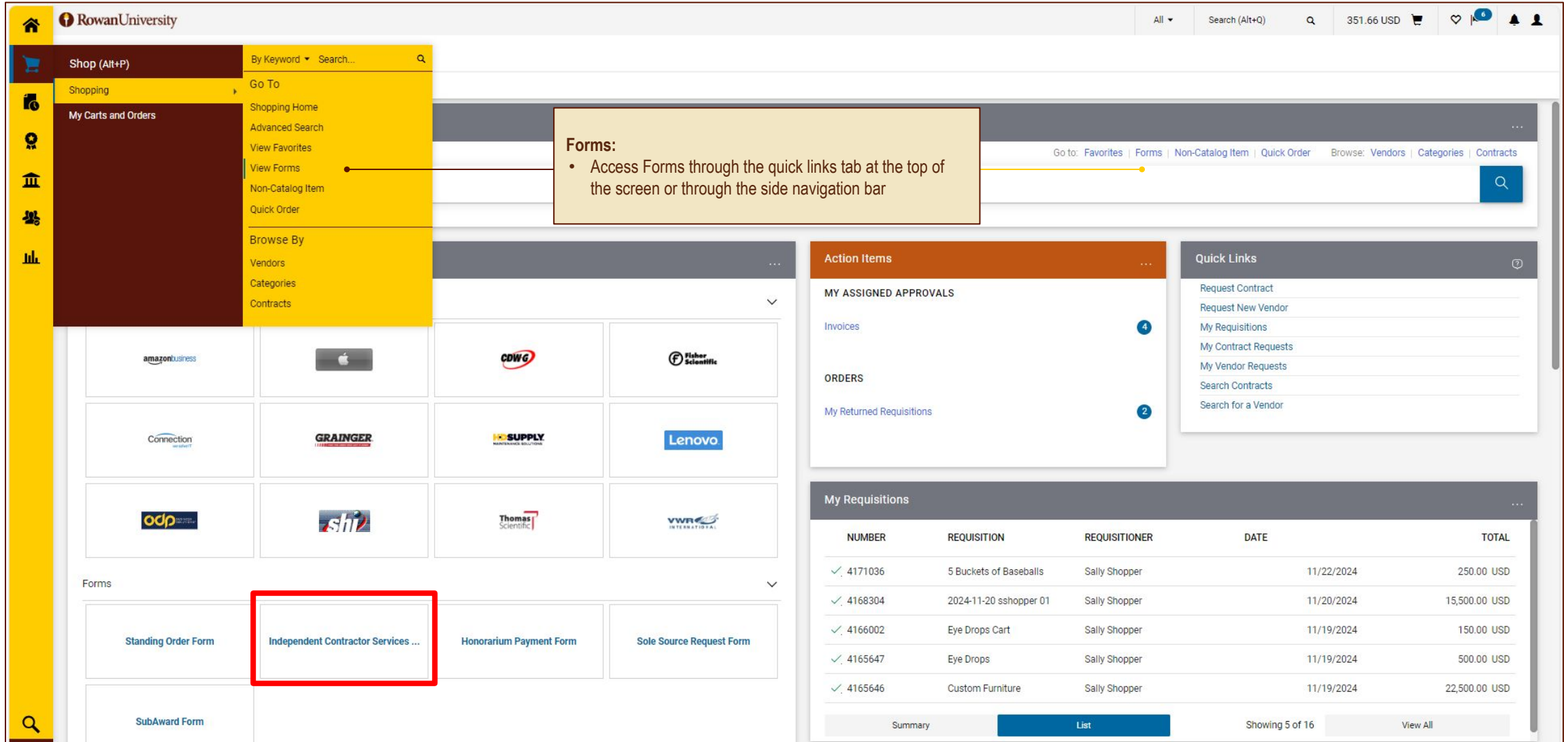
- Vendor Sites:** A yellow box on the left contains the text: "Vendor Sites: Every Vendor's site will look slightly different, but operate in a very similar manner."
- For Those Out in the Cold:** A banner image of a worker in winter gear with the text: "For Those Out in the Cold. Your top cold-stress questions answered."
- Recently Viewed Products:** A section showing a 'WESTWARD Socket Wrench Set: 3/8 in Drive Size, 125 Pieces, (25) 12-Point/(26) 6-Point/(6) 8-Point' with a price of '\$215.02 / each' and an 'Add to Cart' button.
- Cart:** A central white box titled 'Cart' containing:
  - Delivery Method:** A radio button selected for 'Ship'.
  - Ship Availability:** 'Showing product availability for ZIP Code 08028' with a 'Change' link.
  - Grainger Products:** A list of items, including the same 'WESTWARD Socket Wrench Set' with a quantity of '1' and a price of '\$215.02 / each'. It also includes 'Remove' and 'Save for Later' options.
  - Cart Summary:** A table showing:
 

Subtotal	\$215.02
Estimated Shipping	\$20.53
<b>Estimated Total</b>	<b>\$235.55</b>

 Below the summary, it states: "Availability, shipping & tax are not final until the order is received from your company."
- The One Item You Need + 1.5 Million More:** A row of seven product categories with icons: 'Safety & Security' (hard hat), 'Lighting & Electrical' (light bulb), 'Tools & Test Instruments' (drill), 'Cleaning & Janitorial' (mop bucket), 'HVAC' (air filter), 'Pipes, Hose, Tube & Fittings' (red hose), and 'Plumbing & Pumps' (pump).

# Step by Step

1c. **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)



The screenshot shows the Rowan University Shopping Dashboard. A yellow callout box titled "Forms:" contains the following text:

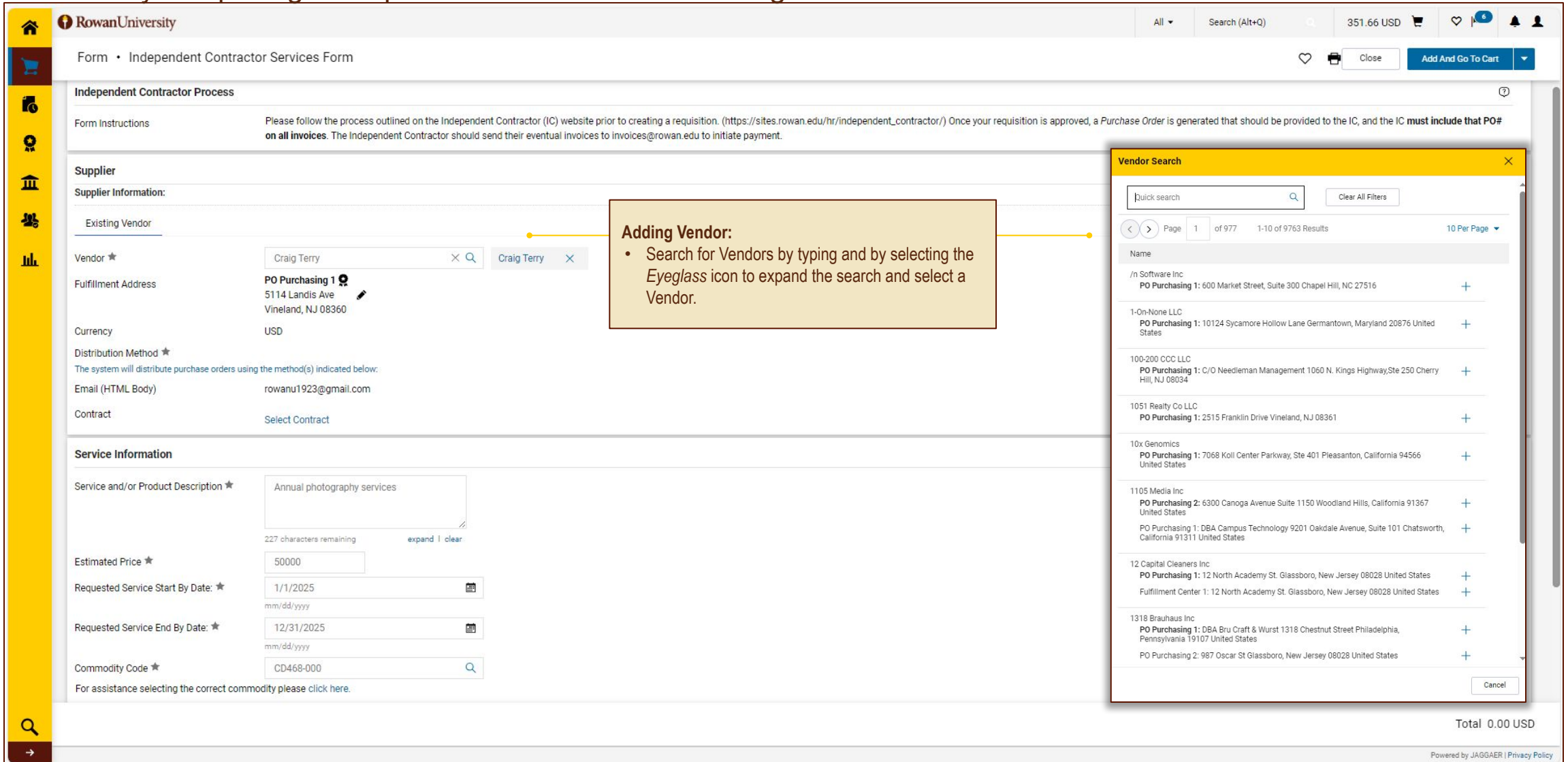
- Access Forms through the quick links tab at the top of the screen or through the side navigation bar

The dashboard features a top navigation bar with a search bar, currency (351.66 USD), and user profile. A left sidebar contains navigation options like "Shop (Alt+P)", "My Carts and Orders", and "Browse By". A central grid displays various vendor logos including Amazon Business, Apple, CDWG, Fisher Scientific, Connection, Grainger, Supply, Lenovo, ODP, Shi, Thomas Scientific, and VWR International. Below the grid is a "Forms" section with buttons for "Standing Order Form", "Independent Contractor Services ..." (highlighted with a red box), "Honorarium Payment Form", "Sole Source Request Form", and "SubAward Form". On the right, there are sections for "Action Items" (MY ASSIGNED APPROVALS, ORDERS), "Quick Links", and "My Requisitions".

NUMBER	REQUISITION	REQUISITIONER	DATE	TOTAL
✓ 4171036	5 Buckets of Baseballs	Sally Shopper	11/22/2024	250.00 USD
✓ 4168304	2024-11-20 sshopper 01	Sally Shopper	11/20/2024	15,500.00 USD
✓ 4166002	Eye Drops Cart	Sally Shopper	11/19/2024	150.00 USD
✓ 4165647	Eye Drops	Sally Shopper	11/19/2024	500.00 USD
✓ 4165646	Custom Furniture	Sally Shopper	11/19/2024	22,500.00 USD

# Step by Step

**1c. 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*.



The screenshot shows the 'Independent Contractor Services Form' in progress. The form includes sections for 'Supplier Information' and 'Service Information'. A 'Vendor Search' popup is open on the right, displaying a list of vendors with their names and addresses. A callout box titled 'Adding Vendor:' provides instructions on how to search for and select a vendor.

**Adding Vendor:**

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

**Supplier Information:**

Form Instructions: Please follow the process outlined on the Independent Contractor (IC) website prior to creating a requisition. (https://sites.rowan.edu/hr/independent\_contractor/) Once your requisition is approved, a Purchase Order is generated that should be provided to the IC, and the IC **must include that PO# on all invoices**. The Independent Contractor should send their eventual invoices to invoices@rowan.edu to initiate payment.

**Supplier**

Supplier Information:

Existing Vendor

Vendor \*

Fulfillment Address **PO Purchasing 1**   
5114 Landis Ave  
Vineland, NJ 08360

Currency USD

Distribution Method \*  
The system will distribute purchase orders using the method(s) indicated below.

Email (HTML Body) rowanu1923@gmail.com

Contract [Select Contract](#)

**Service Information**

Service and/or Product Description \*   
227 characters remaining

Estimated Price \*

Requested Service Start By Date \*    
mm/dd/yyyy

Requested Service End By Date \*    
mm/dd/yyyy

Commodity Code \*

For assistance selecting the correct commodity please click here.

**Vendor Search**

Quick search

Page 1 of 977 1-10 of 9763 Results 10 Per Page

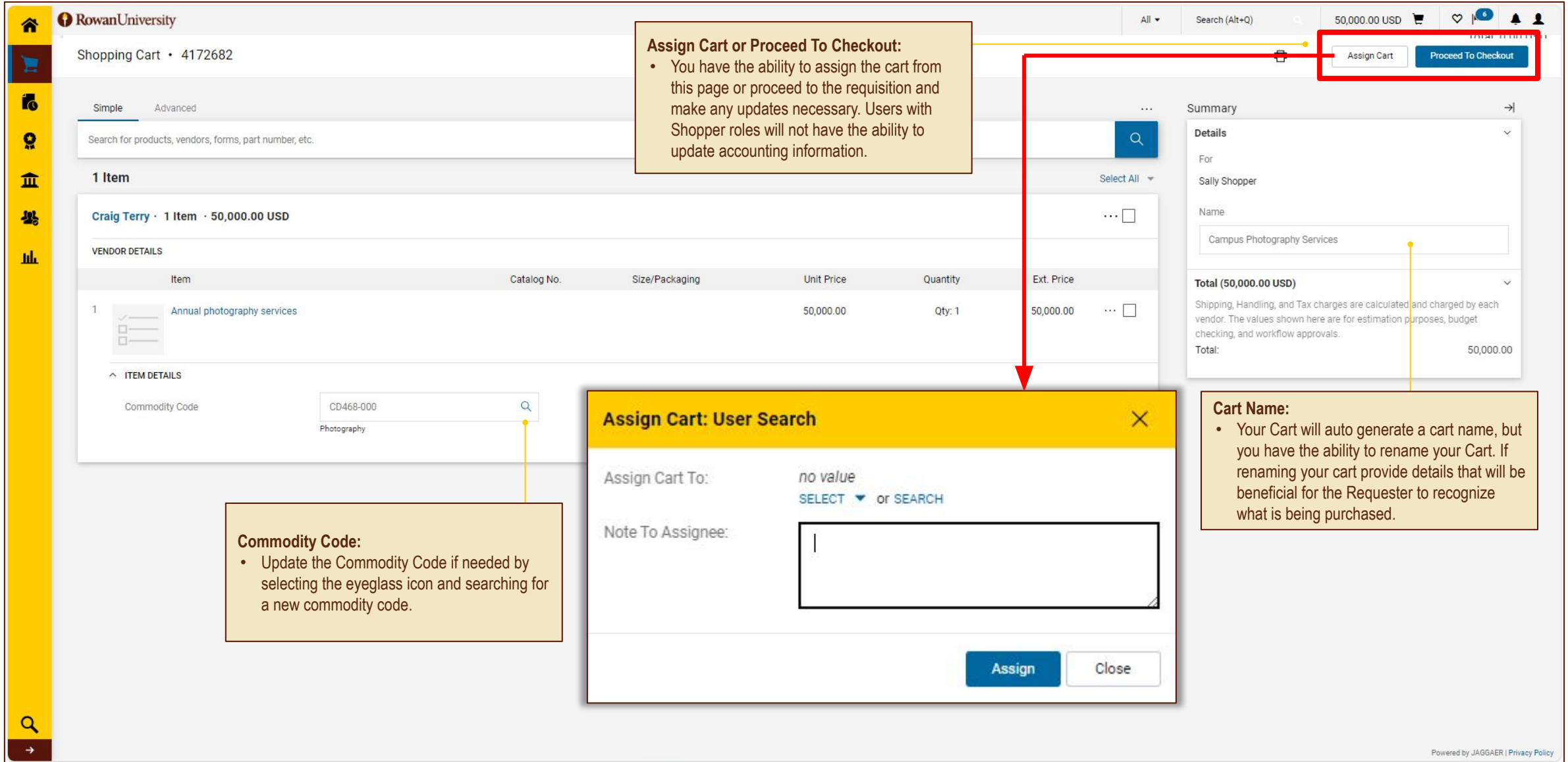
Name	
/n Software Inc PO Purchasing 1: 600 Market Street, Suite 300 Chapel Hill, NC 27516	<input type="button" value="+"/>
1-On-None LLC PO Purchasing 1: 10124 Sycamore Hollow Lane Germantown, Maryland 20876 United States	<input type="button" value="+"/>
100-200 CCC LLC PO Purchasing 1: C/O Needleman Management 1060 N. Kings Highway, Ste 250 Cherry Hill, NJ 08034	<input type="button" value="+"/>
1051 Realty Co LLC PO Purchasing 1: 2515 Franklin Drive Vineland, NJ 08361	<input type="button" value="+"/>
10x Genomics PO Purchasing 1: 7068 Koll Center Parkway, Ste 401 Pleasanton, California 94566 United States	<input type="button" value="+"/>
1105 Media Inc PO Purchasing 2: 6300 Canoga Avenue Suite 1150 Woodland Hills, California 91367 United States	<input type="button" value="+"/>
PO Purchasing 1: DBA Campus Technology 9201 Oakdale Avenue, Suite 101 Chatsworth, California 91311 United States	<input type="button" value="+"/>
12 Capital Cleaners Inc. PO Purchasing 1: 12 North Academy St. Glassboro, New Jersey 08028 United States	<input type="button" value="+"/>
Fulfillment Center 1: 12 North Academy St. Glassboro, New Jersey 08028 United States	<input type="button" value="+"/>
1318 Brauhaus Inc PO Purchasing 1: DBA Bru Craft & Wurst 1318 Chestnut Street Philadelphia, Pennsylvania 19107 United States	<input type="button" value="+"/>
PO Purchasing 2: 987 Oscar St Glassboro, New Jersey 08028 United States	<input type="button" value="+"/>

Total 0.00 USD

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# Step by Step

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



The screenshot shows a shopping cart for 'Craig Terry' with one item: 'Annual photography services' for 50,000.00 USD. The interface includes a search bar, a summary panel, and an 'Assign Cart: User Search' modal window.

**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.

**Assign Cart: User Search**

Assign Cart To:  SELECT or SEARCH

Note To Assignee:

Summary:

Details

For: Sally Shopper

Name:

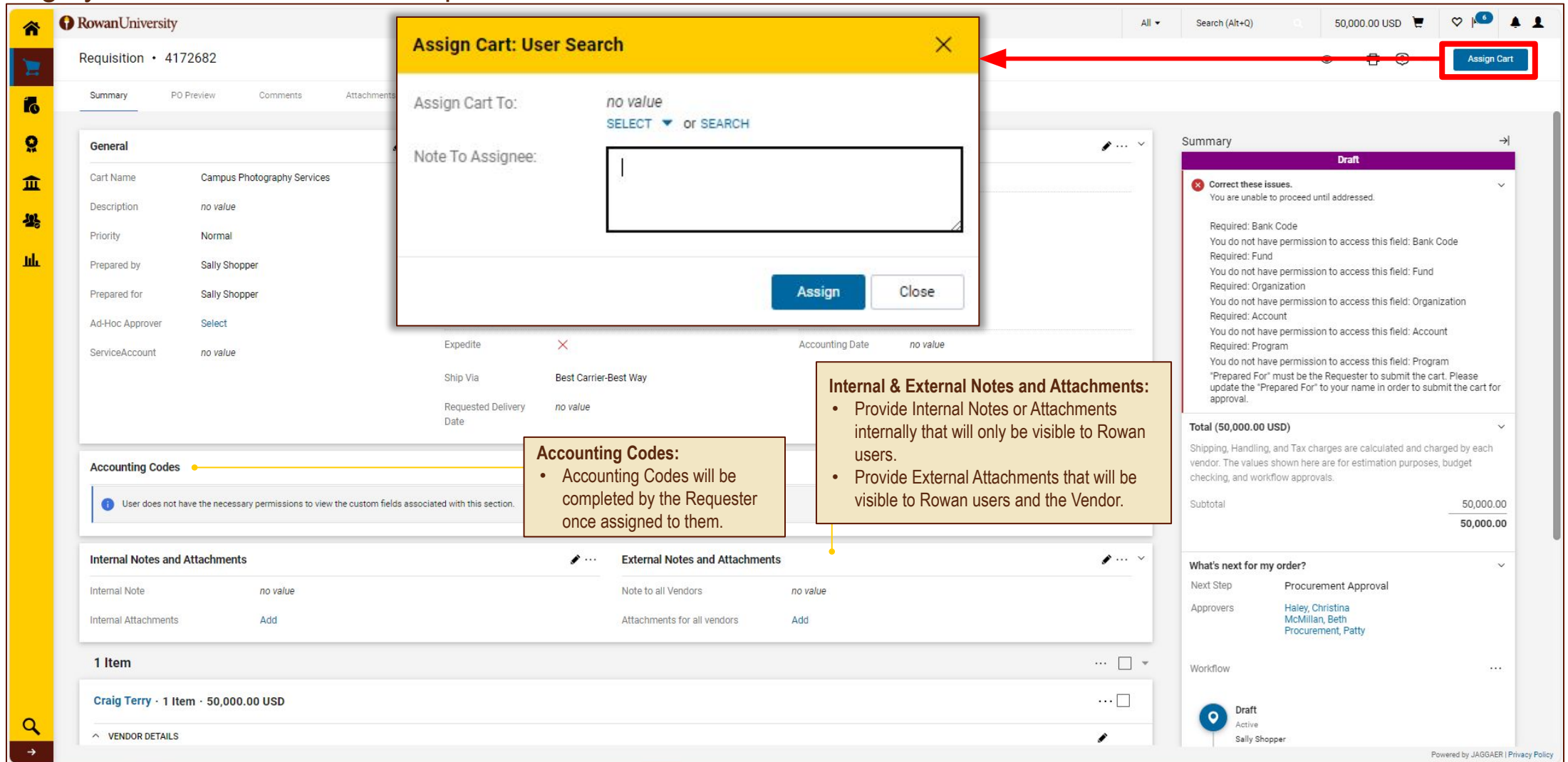
Total (50,000.00 USD)

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

# 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 Requester.



The screenshot displays the 'Assign Cart: User Search' modal window over a requisition page. The modal has a yellow header and contains the following fields:

- Assign Cart To:** A dropdown menu currently showing 'no value' with a 'SELECT' button and a 'SEARCH' button.
- Note To Assignee:** A large text input area.
- Buttons:** 'Assign' (blue) and 'Close' (white) buttons at the bottom.

A red arrow points from the 'Assign Cart' button in the top right corner of the requisition page to the modal window.

Below the modal, there are two callout boxes:

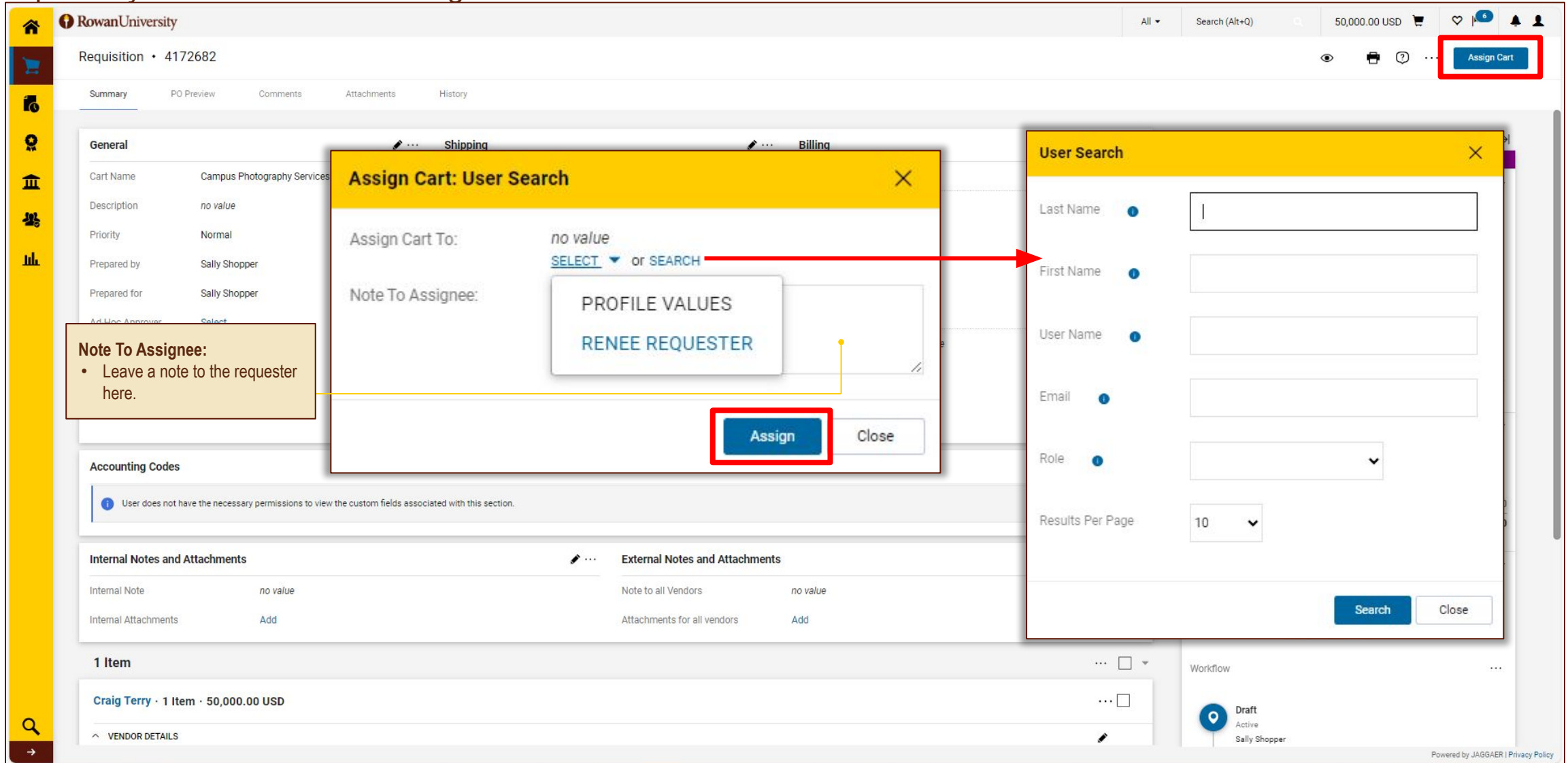
- Accounting Codes:**
  - Accounting Codes will be completed by the Requester once assigned to them.
- Internal & External Notes and Attachments:**
  - Provide Internal Notes or Attachments internally that will only be visible to Rowan users.
  - Provide External Attachments that will be visible to Rowan users and the Vendor.

The background requisition page shows the following details:

- Requisition:** 4172682
- General:**
  - Cart Name: Campus Photography Services
  - Description: no value
  - Priority: Normal
  - Prepared by: Sally Shopper
  - Prepared for: Sally Shopper
  - Ad-Hoc Approver: Select
  - ServiceAccount: no value
- Shipping:**
  - Expedite: X
  - Ship Via: Best Carrier-Best Way
  - Requested Delivery Date: no value
- Accounting Codes:**
  - User does not have the necessary permissions to view the custom fields associated with this section.
- Internal Notes and Attachments:**
  - Internal Note: no value
  - Internal Attachments: Add
- External Notes and Attachments:**
  - Note to all Vendors: no value
  - Attachments for all vendors: Add
- Item:**
  - Craig Terry · 1 Item · 50,000.00 USD
- Summary:**
  - Status: Draft
  - Issues: Correct these issues. You are unable to proceed until addressed.
    - Required: Bank Code (You do not have permission to access this field: Bank Code)
    - Required: Fund (You do not have permission to access this field: Fund)
    - Required: Organization (You do not have permission to access this field: Organization)
    - Required: Account (You do not have permission to access this field: Account)
    - Required: Program (You do not have permission to access this field: Program)
  - Total (50,000.00 USD):
    - Subtotal: 50,000.00
    - Total: 50,000.00
  - Next Step: Procurement Approval
  - Approvers: Haley, Christina; McMillan, Beth; Procurement, Patty

# 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.



The screenshot displays the Rowan University procurement interface. At the top right, a blue button labeled "Assign Cart" is highlighted with a red box. Below it, a "User Search" modal is open, showing search criteria for Last Name, First Name, User Name, Email, and Role. A red arrow points from the "or SEARCH" link in the "Assign Cart: User Search" modal to the search input field in the "User Search" modal. The "Assign Cart: User Search" modal shows search results for "PROFILE VALUES" and "RENEE REQUESTER". A red box highlights the "Assign" button at the bottom of this modal. A yellow callout box points to the "Note To Assignee:" field, containing the text: "Note To Assignee: • Leave a note to the requester here."

**Assign Cart: User Search**

Assign Cart To: no value  
[SELECT](#) or [SEARCH](#)

Note To Assignee:

PROFILE VALUES  
 RENEE REQUESTER

**Assign** Close

**User Search**

Last Name:

First Name:

User Name:

Email:

Role:

Results Per Page: 10

**Search** Close

**Note To Assignee:**

- Leave a note to the requester here.

**1 Item**

Craig Terry · 1 Item · 50,000.00 USD

VENDOR DETAILS

Workflow: Draft, Active, Sally Shopper

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