



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



Creating Favorites

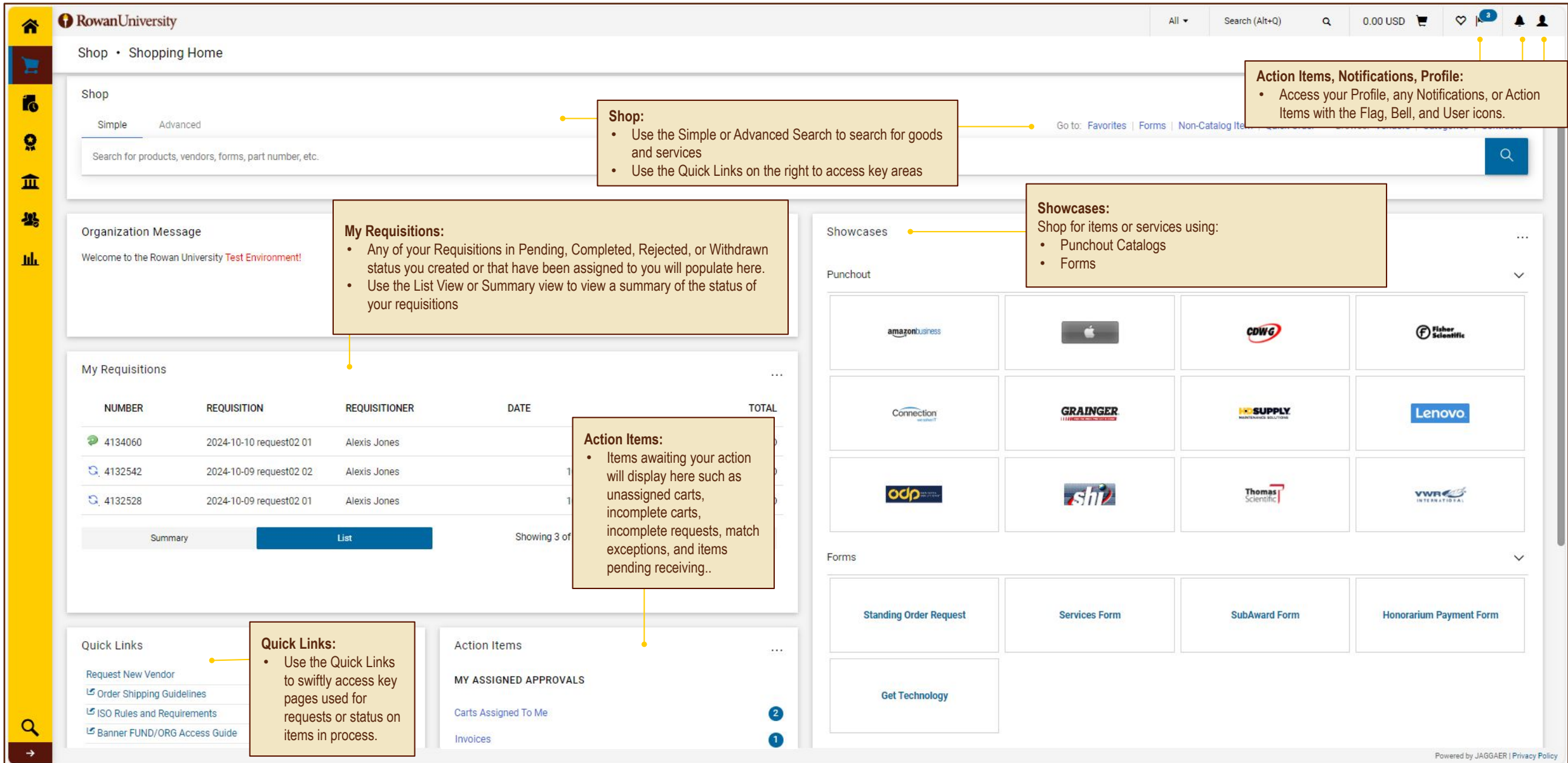
- Add routinely ordered items to a favorites folder for quick re-ordering. Only hosted and form items are eligible.
- Search for items. Select the heart icon located in the top right corner of the item
- Edit the Item Nickname and Quantity and add an optional Description. The correct product name will 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.

Home Page



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

Shop • Shopping Home

Shop

Simple | Advanced

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

Go to: Favorites | Forms | Non-Catalog Items

Shop:

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

Action Items, Notifications, Profile:

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

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		
4132542	2024-10-09 request02 02	Alexis Jones		
4132528	2024-10-09 request02 01	Alexis Jones		

Summary | List | Showing 3 of

Showcases:

Shop for items or services using:

- Punchout Catalogs
- Forms

Shows: amazonbusiness, Apple, CDWG, Fisher Scientific, Connection, GRAINGER, SUPPLY, Lenovo, odp, shi, Thomas Scientific, VWR INTERNATIONAL

Forms: Standing Order Request, Services Form, SubAward Form, Honorarium Payment Form, Get Technology

Quick Links:

- 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

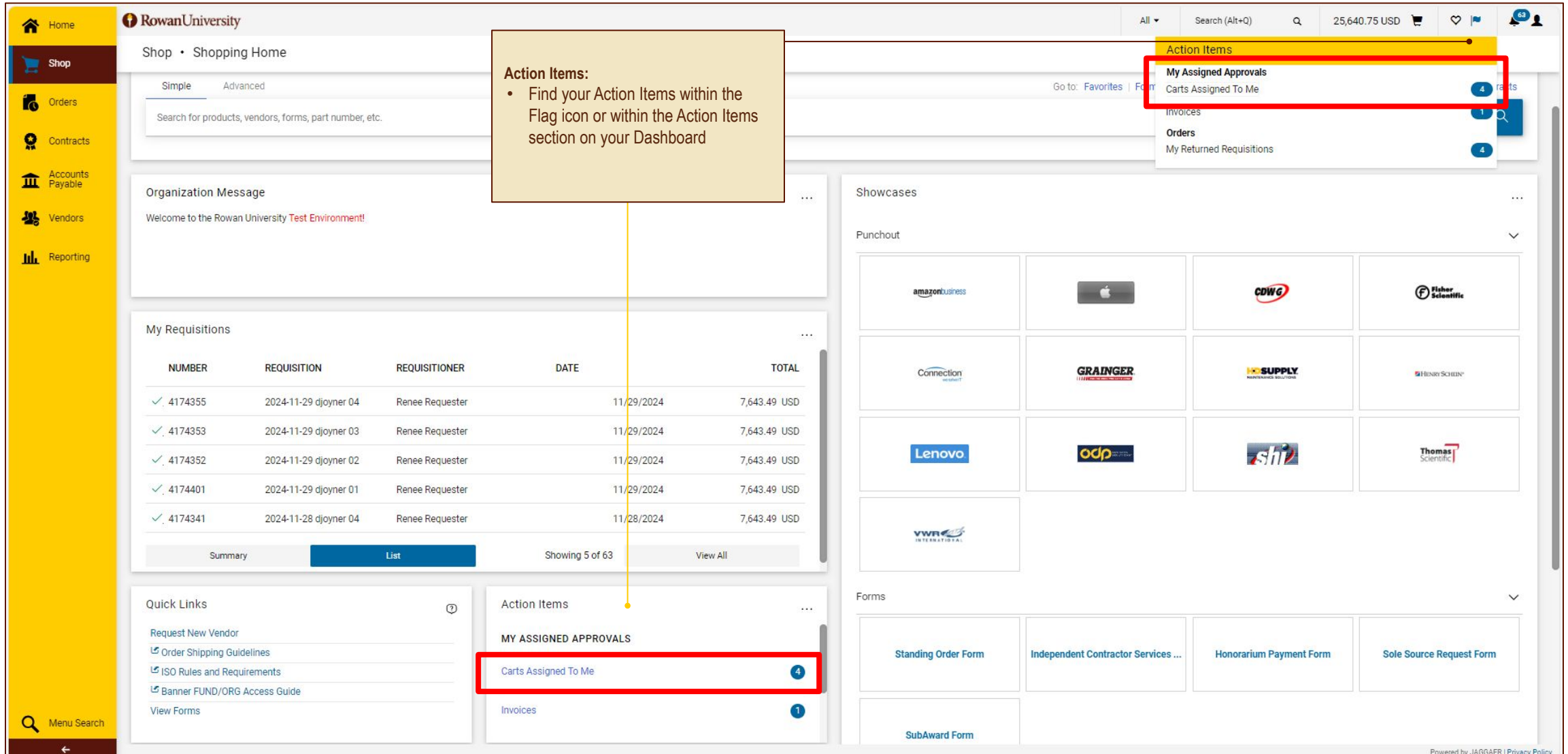
Carts Assigned To Me (2)

Invoices (1)

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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 interface. A yellow sidebar on the left contains navigation options: Home, Shop, Orders, Contracts, Accounts Payable, Vendors, and Reporting. The main content area is titled 'Shop • Shopping Home' and includes a search bar, an 'Organization Message' (Welcome to the Rowan University Test Environment!), and a 'My Requisitions' table. A 'Quick Links' section is located at the bottom left, and an 'Action Items' section is at the bottom center. A dropdown menu for 'Action Items' is open at the top right, showing 'My Assigned Approvals' and 'Carts Assigned To Me' (highlighted with a red box). A yellow callout box points to the 'Action Items' section in the sidebar and the 'Carts Assigned To Me' link in the bottom center.

Action Items:

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

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 | View All

Quick Links:

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

Action Items:

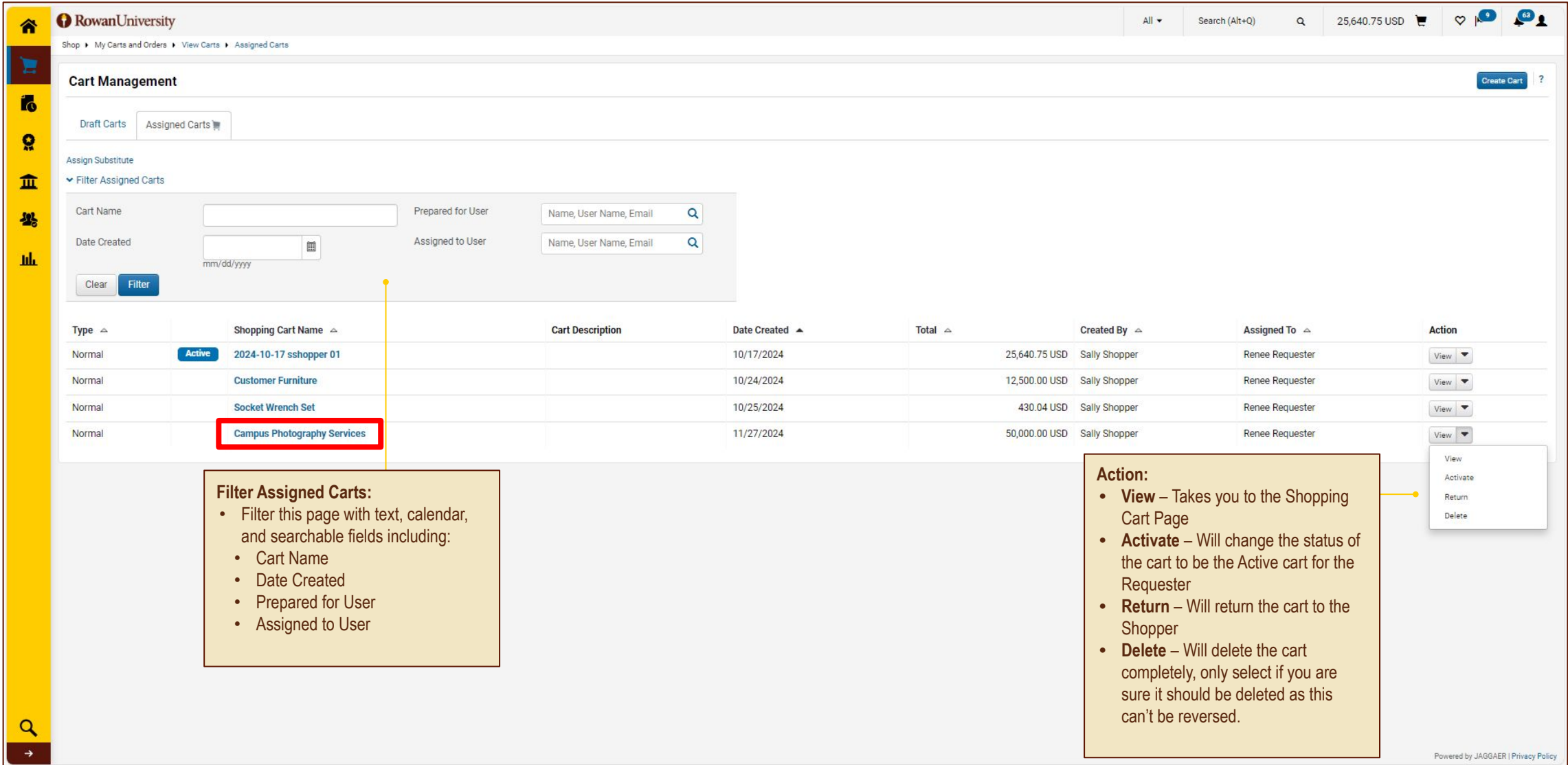
- MY ASSIGNED APPROVALS
- Carts Assigned To Me (4)
- Invoices (1)

Showcases:

- Punchout: amazonbusiness, Apple, CDWG, Fisher Scientific, Connection, GRAINGER, H&B 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

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.



The screenshot shows the 'Assigned Carts' page in the Rowan University system. The page includes a navigation bar, a search bar, and a 'Create Cart' button. Below the navigation is a 'Filter Assigned Carts' section with input fields for 'Cart Name', 'Date Created', 'Prepared for User', and 'Assigned to User'. A table lists several shopping carts, with 'Campus Photography Services' highlighted in a red box. A yellow line points from this box to a callout box. Another yellow line points from the 'View' dropdown menu of the highlighted cart to a second callout box. The page footer indicates it is powered by JAGGAER.

Filter Assigned Carts:

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

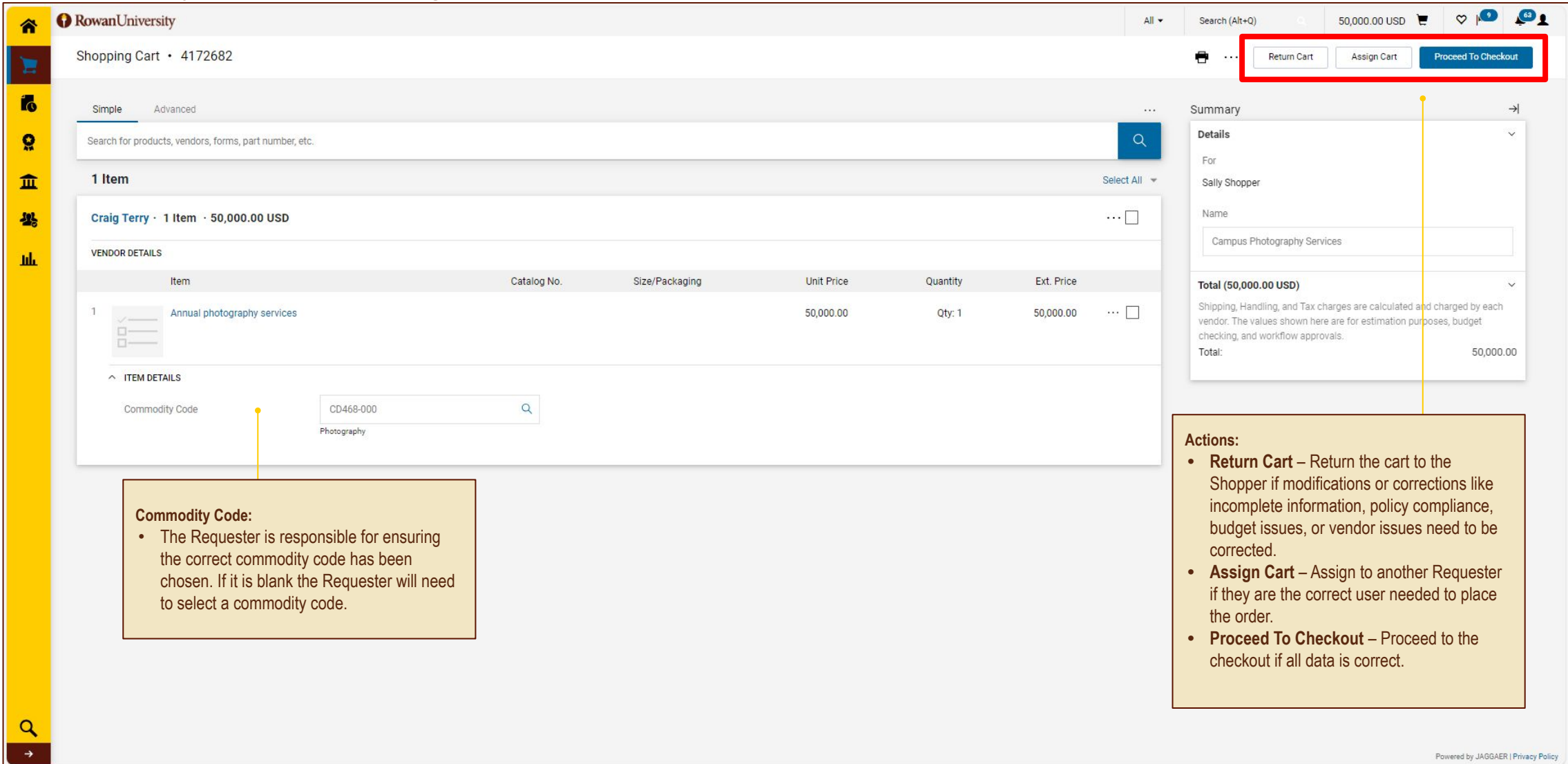
Action:

- 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.

Type	Shopping Cart Name	Cart 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

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



Rowan University Shopping Cart • 4172682

50,000.00 USD

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 Annual photography services			50,000.00	Qty: 1	50,000.00

ITEM DETAILS

Commodity Code Photography

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

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.

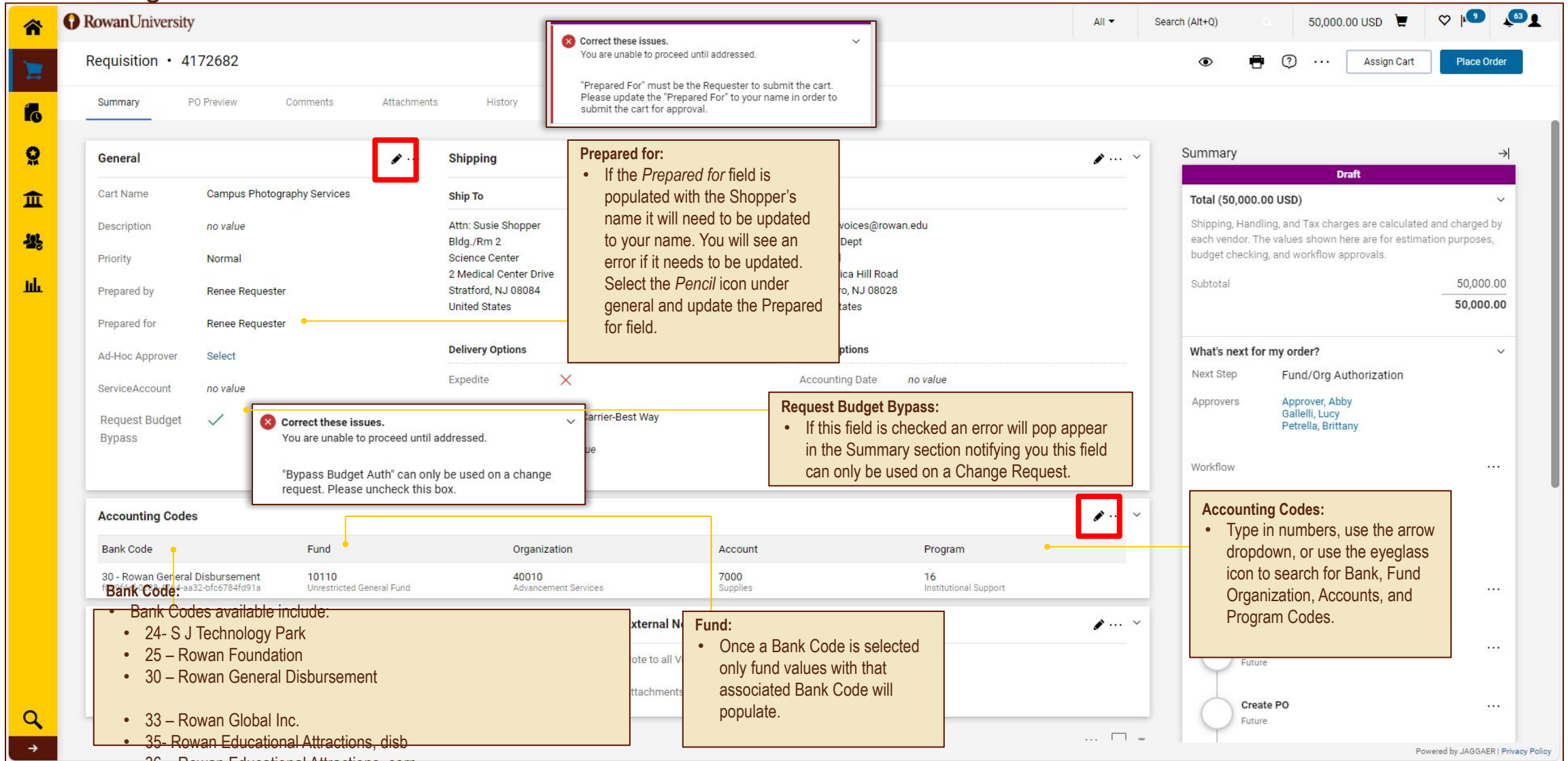
Actions:

- 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.



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.

Accounting Codes:

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

Fund:

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

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

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
Total 50,000.00

What's next for my order?

Next Step Fund/Org Authorization

Approvers Approver, Abby Gallelli, Lucy Petrella, Brittany

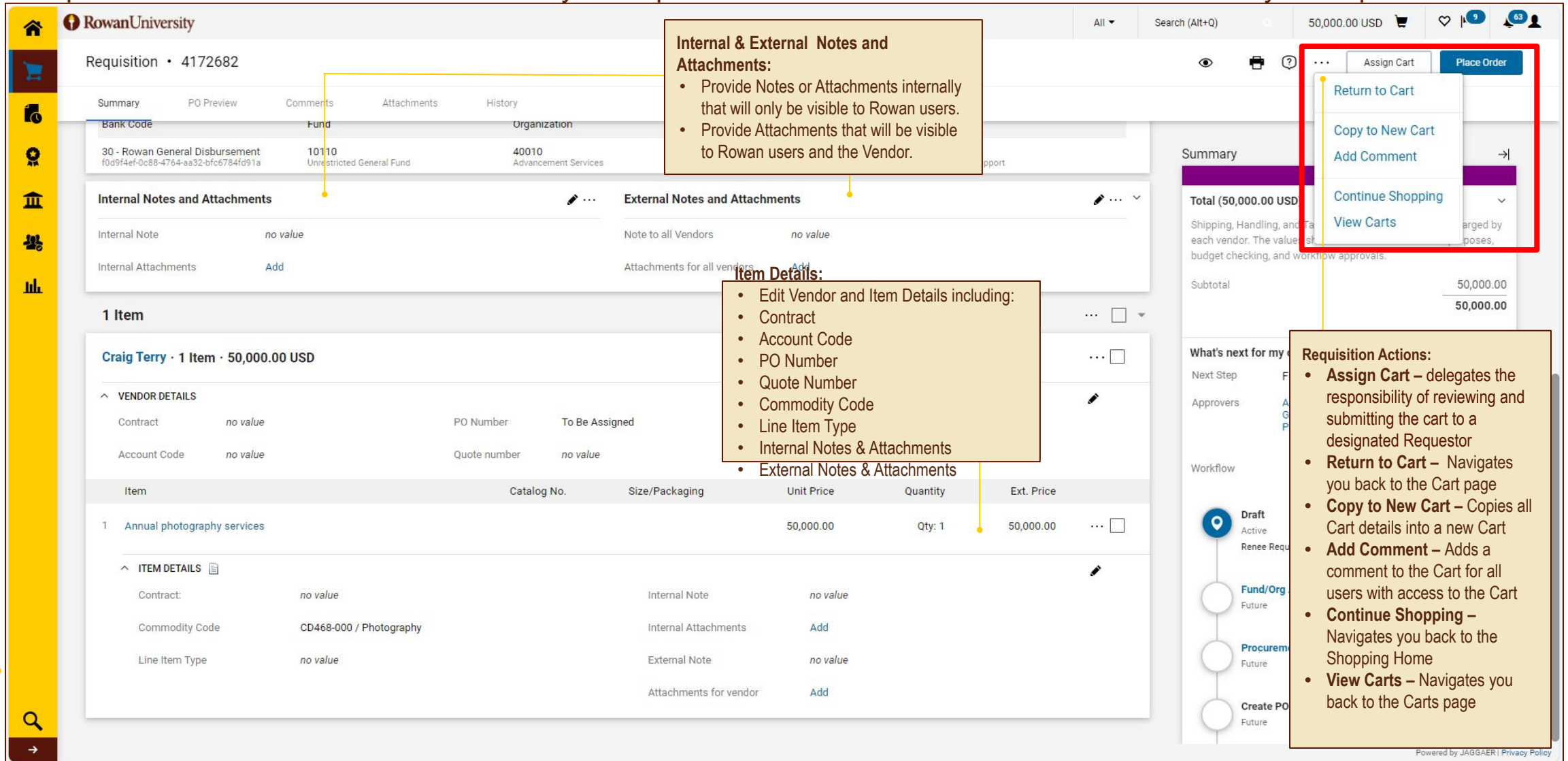
Workflow

Future
Create PO Future

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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

Summary Table:

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Annual photography services			50,000.00	Qty: 1	50,000.00

Vendor Details Table:

Field	Value	Field	Value
Contract	no value	PO Number	To Be Assigned
Account Code	no value	Quote number	no value

Item Details Table:

Field	Value	Field	Value
Contract	no value	Internal Note	no value
Commodity Code	CD468-000 / Photography	Internal Attachments	Add
Line Item Type	no value	External Note	no value
		Attachments for vendor	Add

Summary Table:

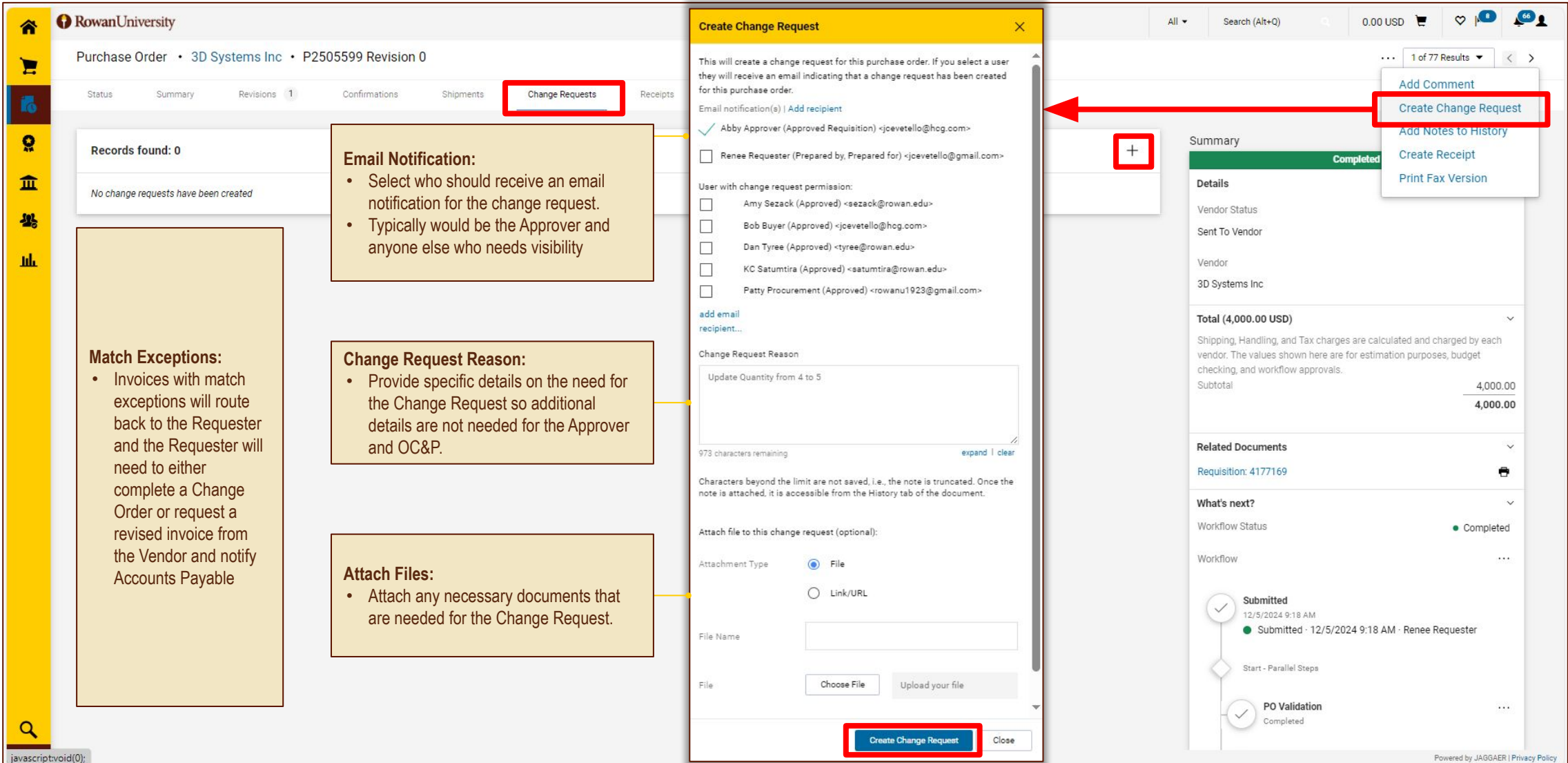
Total (50,000.00 USD)	
Subtotal	50,000.00
	50,000.00

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 Form Fields:

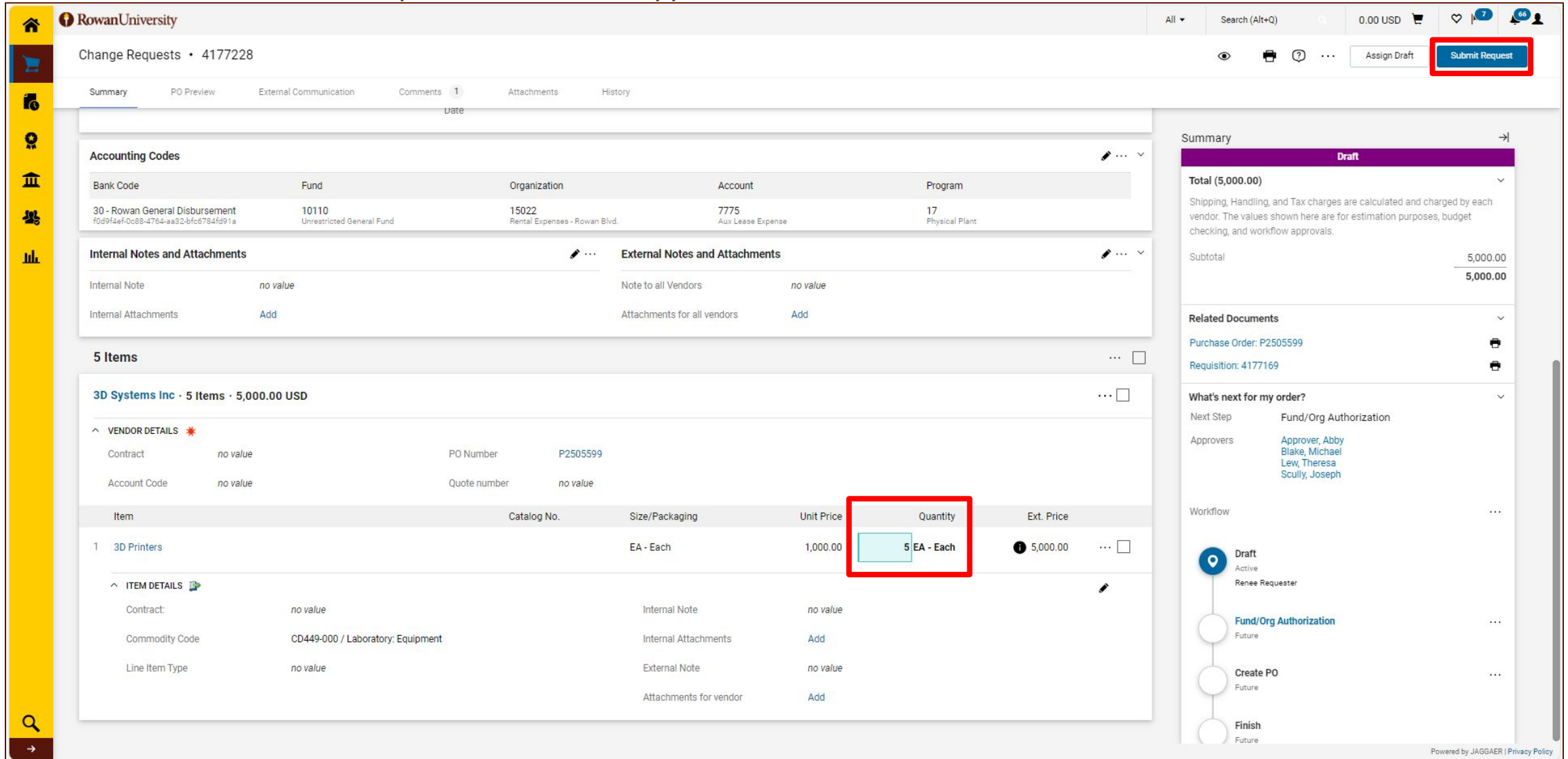
- Email notification(s) | Add recipient:**
 - Abby Approver (Approved Requisition) <jcevettel@hcg.com>
 - Renee Requester (Prepared by, Prepared for) <jcevettel@gmail.com>
- User with change request permission:**
 - Amy Sezack (Approved) <sezack@rowan.edu>
 - Bob Buyer (Approved) <jcevettel@hcg.com>
 - Dan Tyree (Approved) <tyree@rowan.edu>
 - KC Satumtira (Approved) <satumtira@rowan.edu>
 - Patty Procurement (Approved) <rowanu1923@gmail.com>
- Change Request Reason:** Update Quantity from 4 to 5
- Attach file to this change request (optional):**
 - Attachment Type: File, Link/URL
 - File Name:
 - File:

Summary Panel:

- Vendor Status:** Completed
- Total (4,000.00 USD):** Subtotal 4,000.00
- Related Documents:** Requisition: 4177169
- What's next?:** Workflow Status: Completed
- Workflow:** Submitted 12/5/2024 9:18 AM

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.



Rowan University

Change Requests • 4177228

Summary PO Preview External Communication Comments 1 Attachments History

Accounting Codes

Bank Code	Fund	Organization	Account	Program
30 - Rowan General Disbursement fd9f4ef-0c88-4764-aa32-bfc6784f91a	10110 Unrestricted General Fund	15022 Rental Expenses - Rowan Blvd.	7775 Aux Lease Expense	17 Physical Plant

Internal Notes and Attachments External Notes and Attachments

Internal Note no value Internal Note Note to all Vendors no value

Internal Attachments Add Attachments for all vendors Add

5 Items

3D Systems Inc • 5 Items • 5,000.00 USD

VENDOR DETAILS

Contract no value PO Number P2505599

Account Code no value Quote number no value

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 3D Printers		EA - Each	1,000.00	5 EA - Each	5,000.00

ITEM DETAILS

Contract: no value Internal Note no value

Commodity Code CD449-000 / Laboratory: Equipment Internal Attachments Add

Line Item Type no value External Note no value

Attachments for vendor Add

Summary Draft

Total (5,000.00)

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 5,000.00

5,000.00

Related Documents

Purchase Order: P2505599

Requisition: 4177169

What's next for my order?

Next Step Fund/Org Authorization

Approvers Approver, Abby Blake, Michael Lew, Theresa Scully, Joseph

Workflow

Draft Active Renee Requester

Fund/Org Authorization Future

Create PO Future

Finish Future

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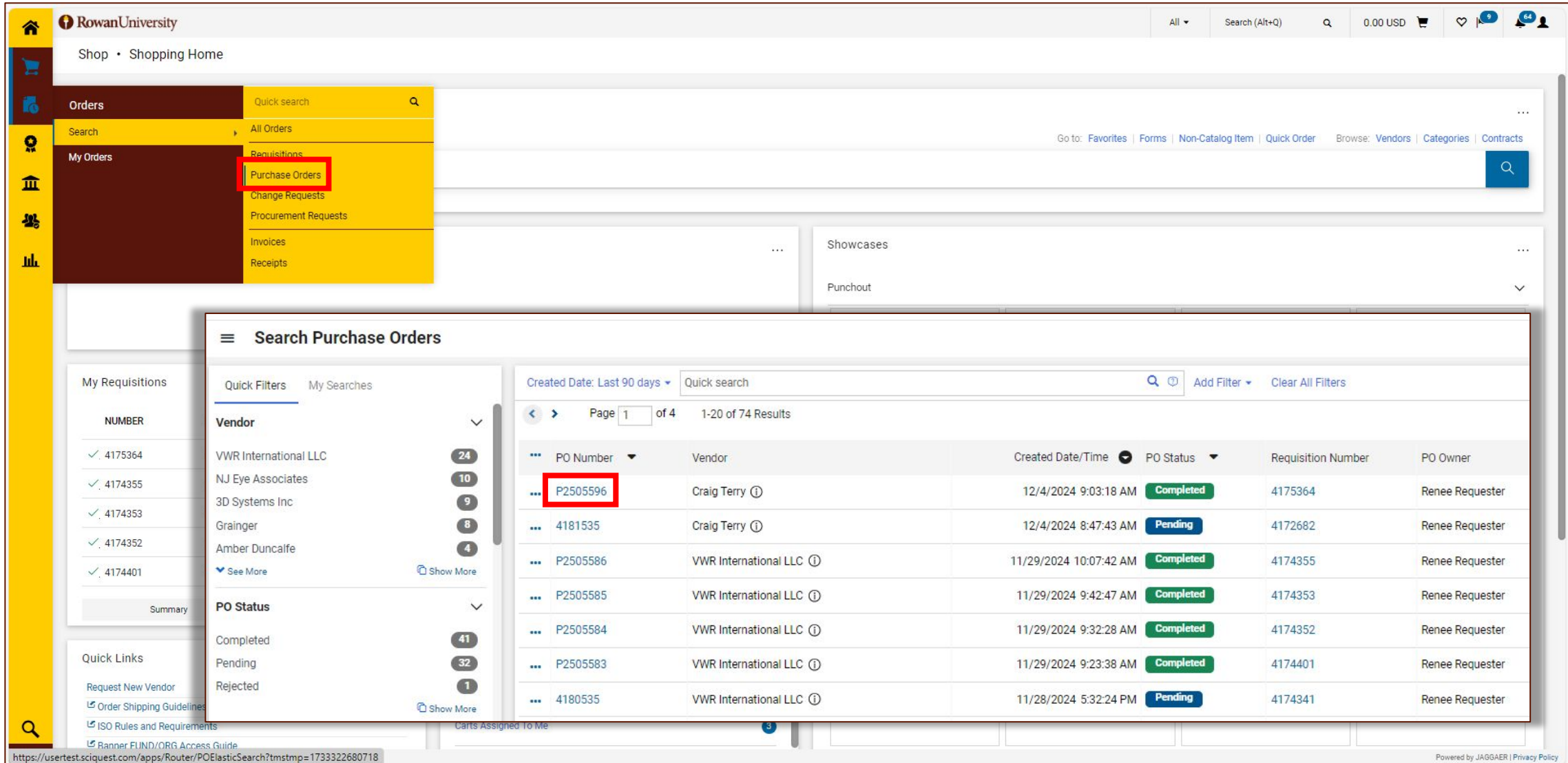
Receiving

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

All orders, including 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 > Purchase Orders. The 'Purchase Orders' menu item is highlighted with a red box. Below, the 'Search Purchase Orders' window is open, displaying a list of purchase orders. The PO number 'P2505596' is highlighted with a red box in the list.

Search Purchase Orders

Created Date: Last 90 days | Quick search | Add Filter | Clear All Filters

Page 1 of 4 | 1-20 of 74 Results

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

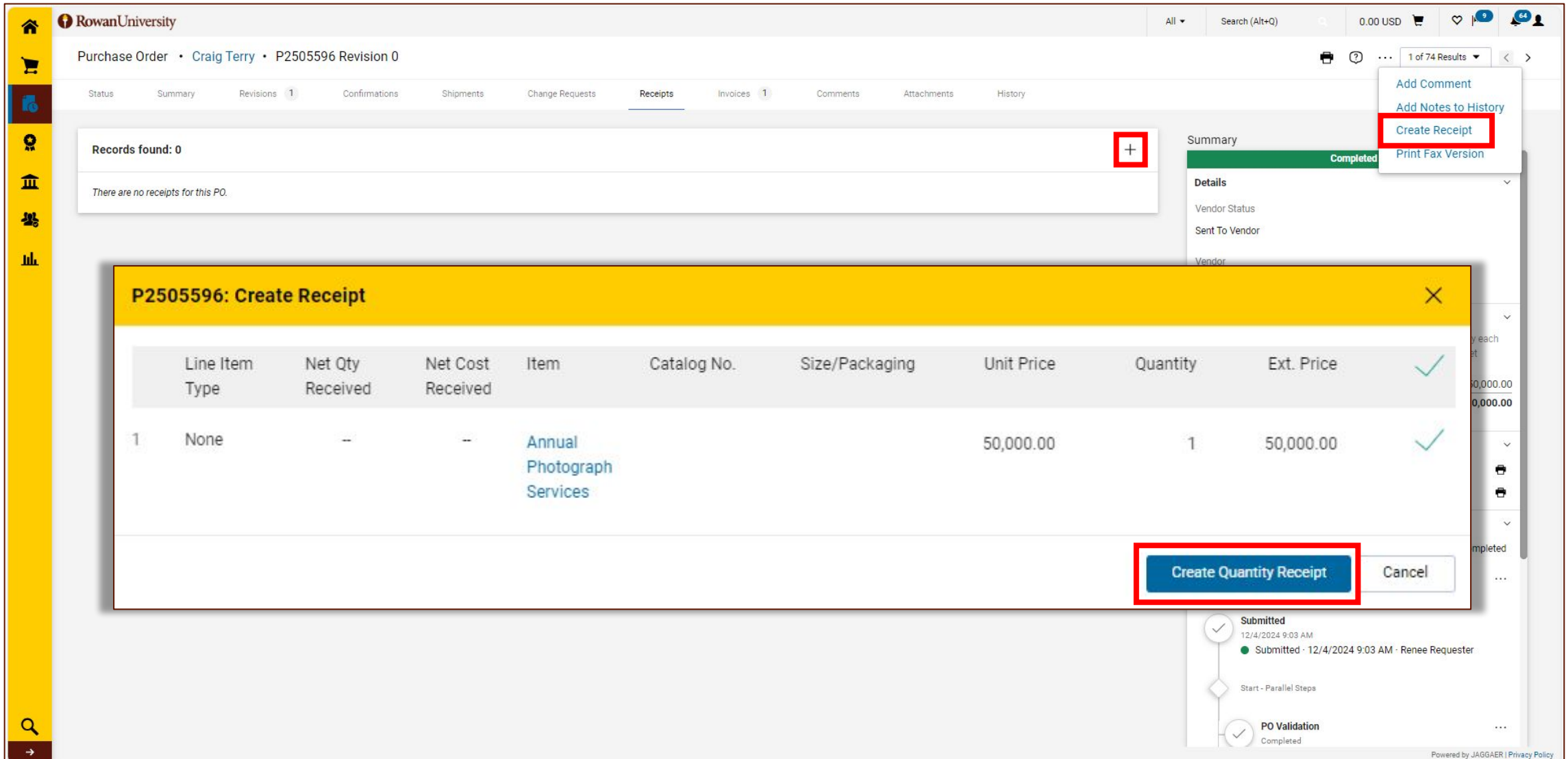
Summary: My Requisitions (4175364, 4174355, 4174353, 4174352, 4174401), Vendor (VWR International LLC: 24, NJ Eye Associates: 10, 3D Systems Inc: 9, Grainger: 8, Amber Duncliffe: 4), PO Status (Completed: 41, Pending: 32, Rejected: 1).

Quick Links: Request New Vendor, Order Shipping Guidelines, ISO Rules and Requirements, Banner FUND/ORG Access Guide.

Footer: <https://usertest.scquest.com/apps/Router/POElasticSearch?tmstmp=1733322680718> | 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*.



RowanUniversity

Purchase Order • Craig Terry • P2505596 Revision 0

Status Summary Revisions 1 Confirmations Shipments Change Requests **Receipts** Invoices 1 Comments Attachments History

Records found: 0 +

There are no receipts for this PO.

P2505596: Create Receipt

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	✓

Create Quantity Receipt Cancel

Submitted 12/4/2024 9:03 AM
Submitted - 12/4/2024 9:03 AM - Renee Requester

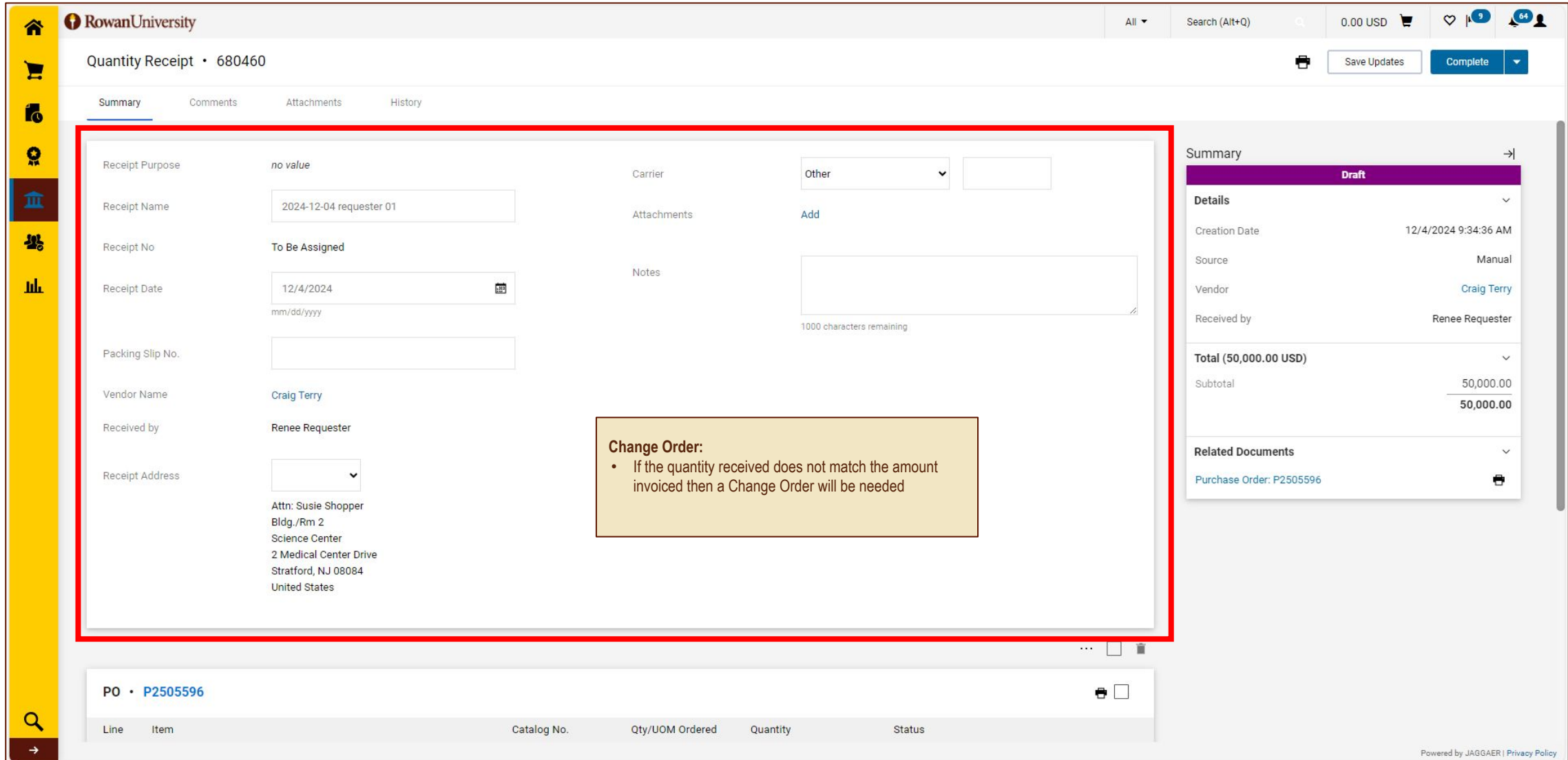
Start - Parallel Steps

PO Validation Completed

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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.



Quantity Receipt • 680460

Summary | Comments | Attachments | History

Receipt Purpose: *no value*

Receipt Name:

Receipt No: **To Be Assigned**

Receipt Date: mm/dd/yyyy

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:

Attachments:

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](#)

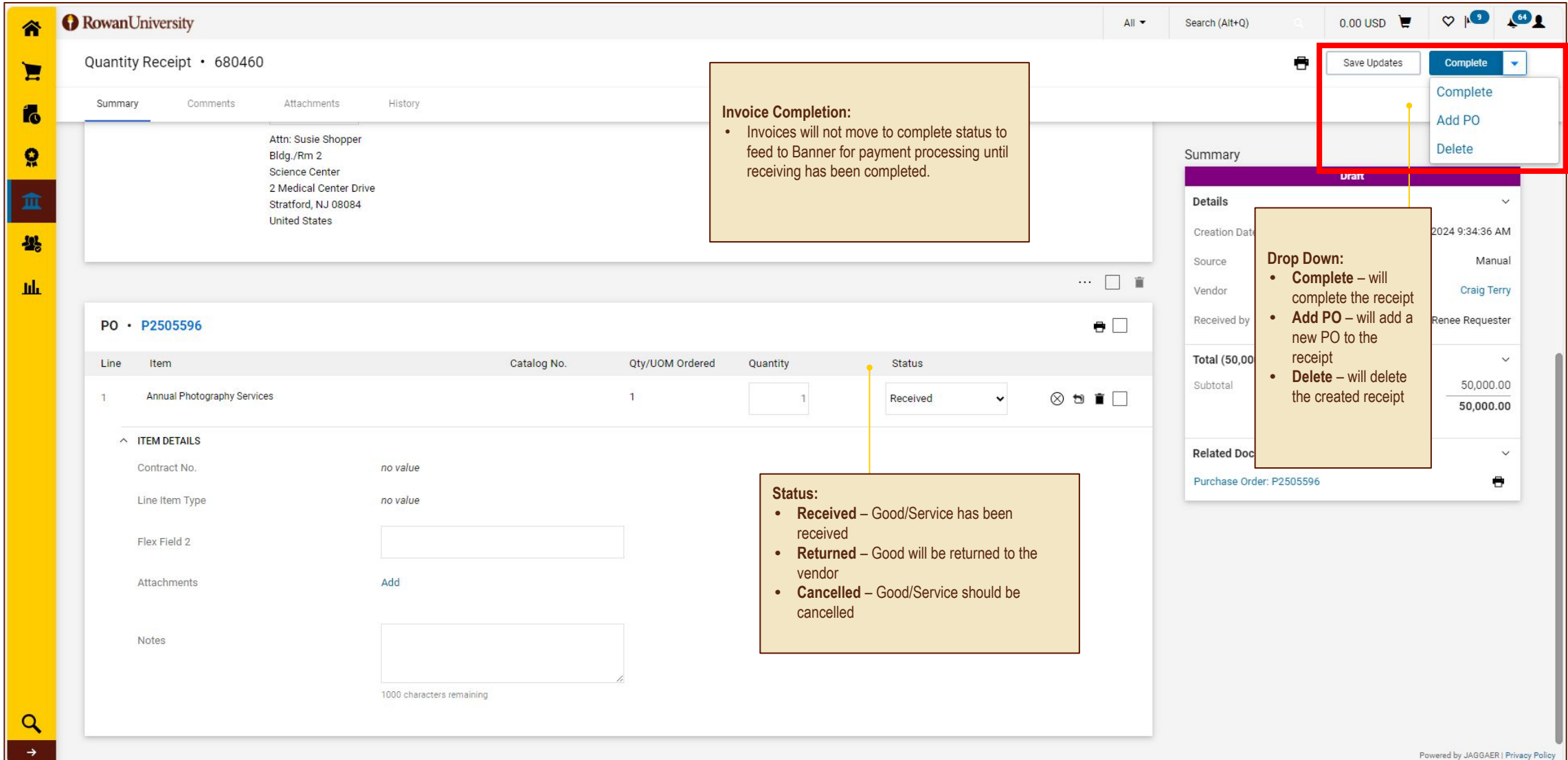
PO • [P2505596](#)

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

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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.



The screenshot displays the 'Quantity Receipt' interface for receipt number 680460. It includes a navigation sidebar, a header with 'RowanUniversity', and a main content area with tabs for Summary, Comments, Attachments, and History. A vendor contact card is visible, listing 'Attn: Susie Shopper' and the address '2 Medical Center Drive, Stratford, NJ 08084, United States'. Below this is a table for 'PO • P2505596' with columns for Line, Item, Catalog No., Qty/UOM Ordered, Quantity, and Status. The first row shows 'Annual Photography Services' with a quantity of 1 and a status of 'Received'. A 'Drop Down' menu is open over the 'Status' field, showing options: Complete, Add PO, and Delete. A 'Save Updates' button and a 'Complete' button are also visible in the top right. A 'Details' sidebar on the right shows receipt information like 'Creation Date: 2024 9:34:36 AM' and 'Total (50,000.00)'. A 'Related Docs' section shows 'Purchase Order: P2505596'.

Invoice Completion:

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

Drop Down:

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

Status:

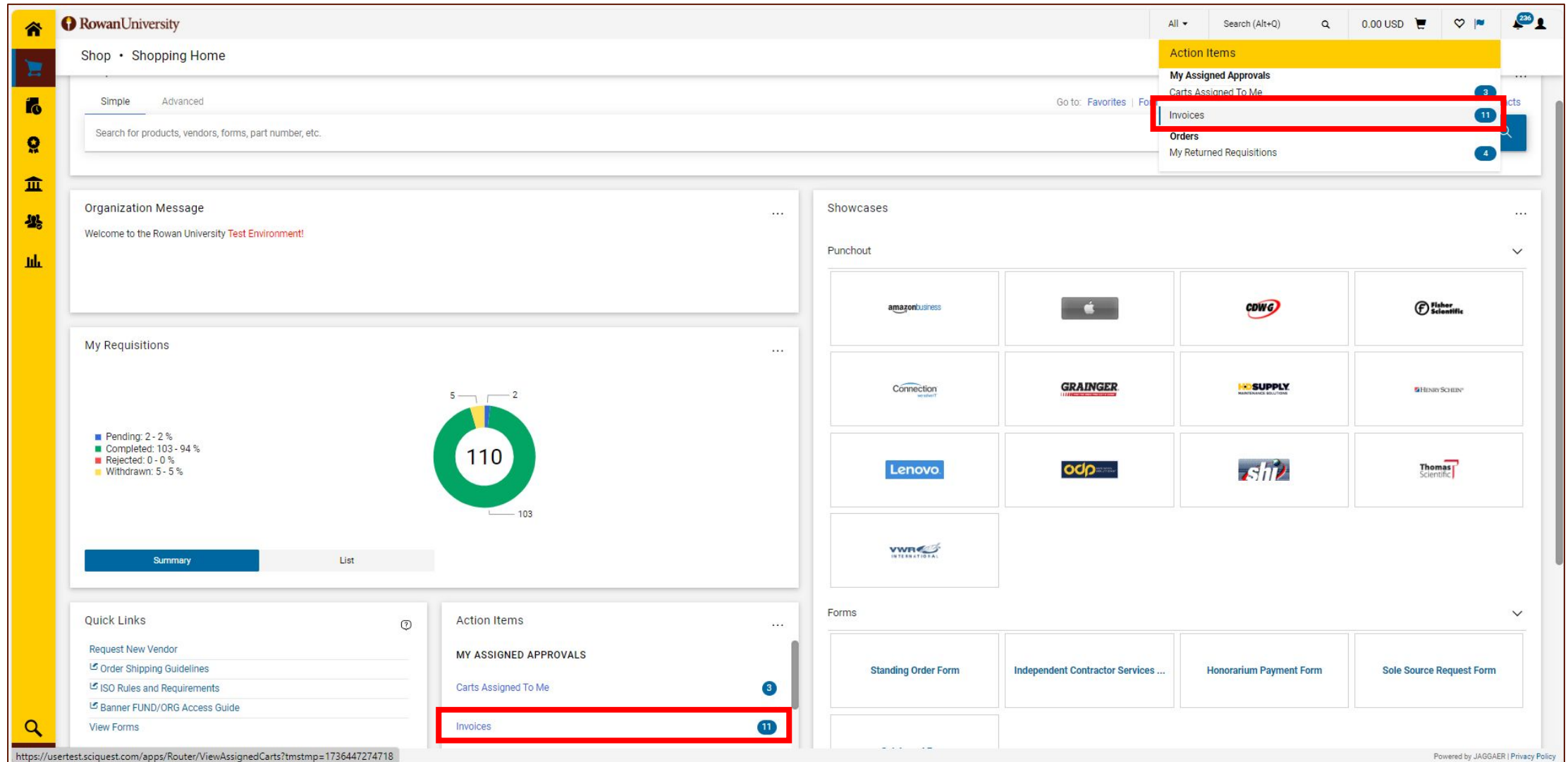
- **Received** – Good/Service has been received
- **Returned** – Good will be returned to the vendor
- **Cancelled** – Good/Service should be cancelled

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*.



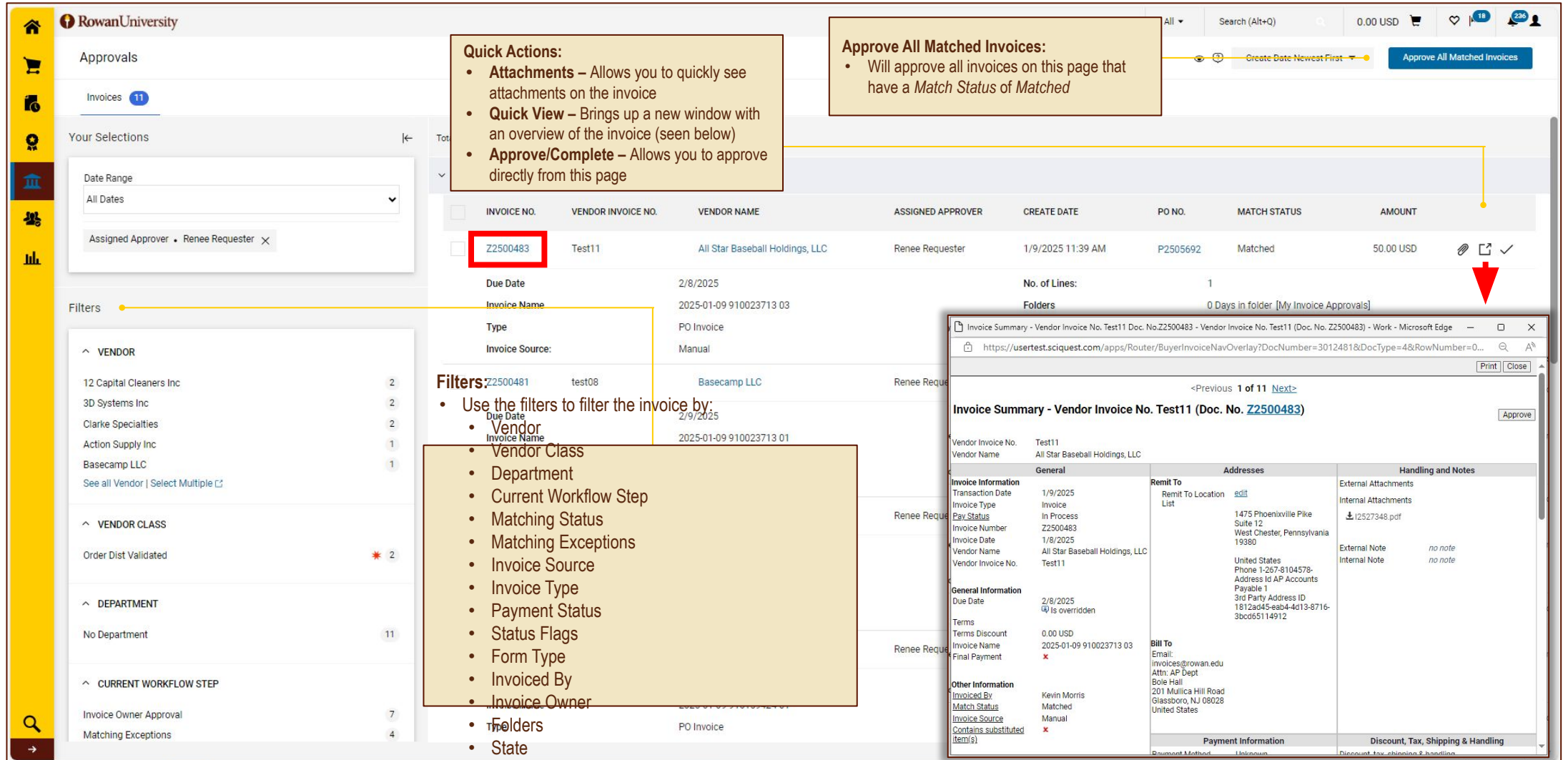
The screenshot displays the Rowan University procurement dashboard. The top navigation bar includes the university logo, a search bar, and user information. A yellow sidebar on the left contains various navigation icons. The main content area is divided into several sections:

- Organization Message:** A welcome message for the Rowan University Test Environment.
- My Requisitions:** A donut chart showing the status of 110 requisitions:
 - Pending: 2 - 2%
 - Completed: 103 - 94%
 - Rejected: 0 - 0%
 - Withdrawn: 5 - 5%
- Quick Links:** A list of links for requesting vendors, shipping guidelines, ISO rules, and banner access.
- Action Items:** A widget titled "MY ASSIGNED APPROVALS" with a notification flag of 11. The "Invoices" option 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 form links for Standing Order, Independent Contractor Services, Honorarium Payment, and Sole Source Request.

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

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)



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*

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

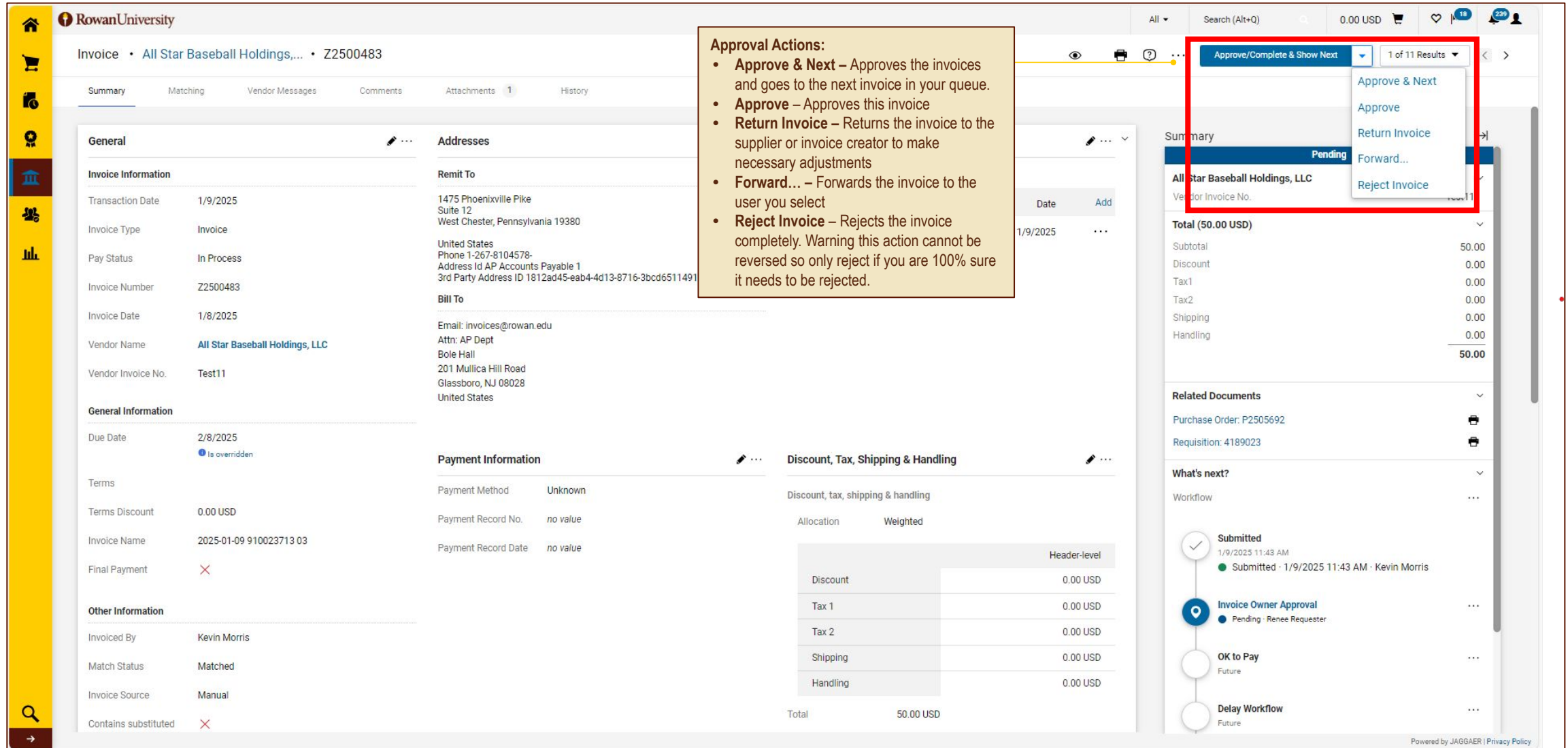
INVOICE NO.	VENDOR INVOICE NO.	VENDOR NAME	ASSIGNED APPROVER	CREATE DATE	PO NO.	MATCH STATUS	AMOUNT
Z2500483	Test11	All Star Baseball Holdings, LLC	Renee Requester	1/9/2025 11:39 AM	P2505692	Matched	50.00 USD

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

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	Remit To Remit To Location: edit 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-ea04-4d13-8716-3bc065114912	External Attachments Internal Attachments: 12527348.pdf External Note: no note Internal Note: no note
General Information Due Date: 2/8/2025 Terms: Is overridden Terms Discount: 0.00 USD Invoice Name: 2025-01-09 910023713 03 Final Payment: x	Bill To Email: invoices@rowan.edu Attn: AP Dept Bole Hall 201 Mullica Hill Road Glassboro, NJ 08028 United States	Payment Information Payment Method: Help Discount, Tax, Shipping & Handling

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.



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.

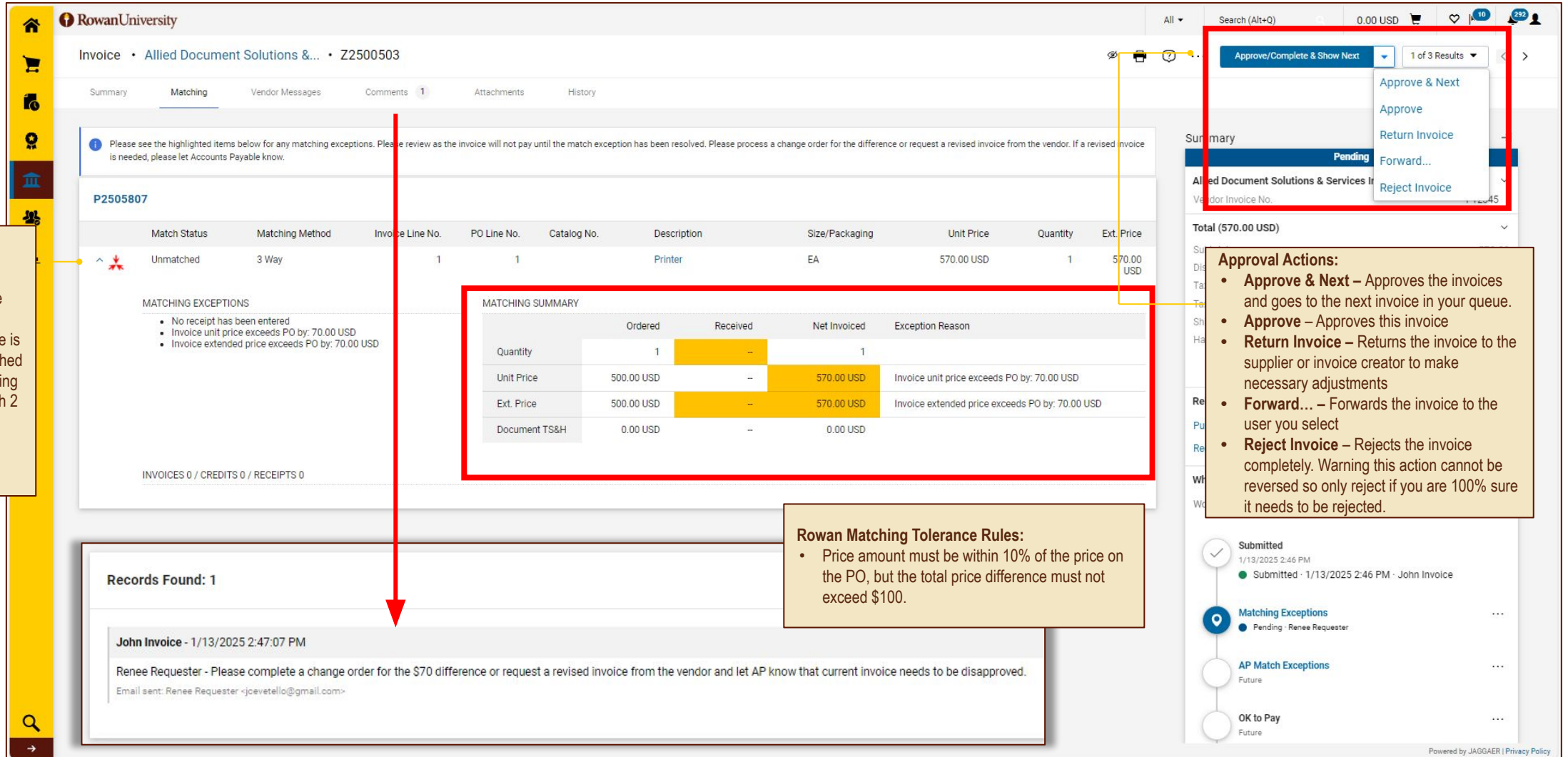
Allocation	Weighted	Header-level
Discount		0.00 USD
Tax 1		0.00 USD
Tax 2		0.00 USD
Shipping		0.00 USD
Handling		0.00 USD
Total	50.00 USD	

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.

MATCHING SUMMARY

	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	

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.

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.

Records Found: 1

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 <jcvetello@gmail.com>