



## HokieMart Requestor Guide



## **Table of Contents**

<b>Introduction to HokieMart</b> .....	<b>4</b>
Overview of HokieMart Process .....	5
HokieMart Workflow .....	6
Navigation .....	6
User Roles .....	14
<b>System Requirements</b> .....	<b>16</b>
Web Browsers.....	16
Popup Blockers.....	17
Troubleshooting .....	18
Time-Out Sessions.....	19
<b>User Information and Settings</b> .....	<b>20</b>
My Profile.....	20
User Default Settings.....	21
Notification Preferences .....	27
<b>HokieMart Forms</b> .....	<b>31</b>
Contract Suppliers .....	32
Hosted Catalogs.....	38
Punchout Vendors .....	41
Non-Catalog Item.....	44
Direct Pay .....	47
Interdepartmental Service Request (ISR).....	50
Travel Agency Authorization .....	53
<b>Processing Orders in HokieMart</b> .....	<b>55</b>
Create the Cart.....	55
Edit the Cart.....	56
Removing Items from a Cart .....	59
Moving Items to Another Cart.....	60
Final Review .....	61
Internal/External Notes and Attachments.....	66
Funding Information.....	68
Submit the PR.....	72

Withdraw the PR.....	73
Return PR to Requisitioner.....	75
Copying a Cart.....	82
<b>Additional Actions .....</b>	<b>83</b>
Adding a New Supplier/Address .....	83
Best Vendor .....	87
Split Funding .....	88
Shared Department (or On Behalf Of).....	91
Adding a Comment.....	94
SCHEV Orders.....	96
Prepayment Notification .....	97
<b>Procurement Request Forms.....</b>	<b>99</b>
Ship to Address Request Form.....	100
Contract Mod Request Form .....	108
Solicitation Request Form.....	113
<b>Additional Resources .....</b>	<b>119</b>
Selecting Account Codes .....	119
Invoices/Credit Memos.....	120
General Contact Information .....	123
Helpful links/Websites .....	124



## HokieMart Requestor User Guide



### Introduction to HokieMart

The Procurement Department is the Virginia Tech department responsible for overall management of the university's procurement system for the provision of goods, services, insurance and non-capitol construction.

HokieMart is the e-procurement (purchasing) system which allows Virginia Tech to provide an effective and efficient e-procurement (purchasing) system for the university. This system, HokieMart, allows Virginia Tech to:

- secure better pricing of commonly-used products
- provide one-stop shopping
- reduce time and effort in the purchasing process
- select goods from online suppliers
- produce cost savings through the use of HokieMart contract suppliers
- improve business practices with the introduction of initial purchase approval
- increase efficiency with the use of central invoicing and electronic receiving
- produce, in conjunction with Banner, accurate and more timely financial information
- increase the flow of purchase orders to eVA

## Overview of HokieMart Process

After the requisition is submitted and approved in HokieMart, a Purchase Order number is created.

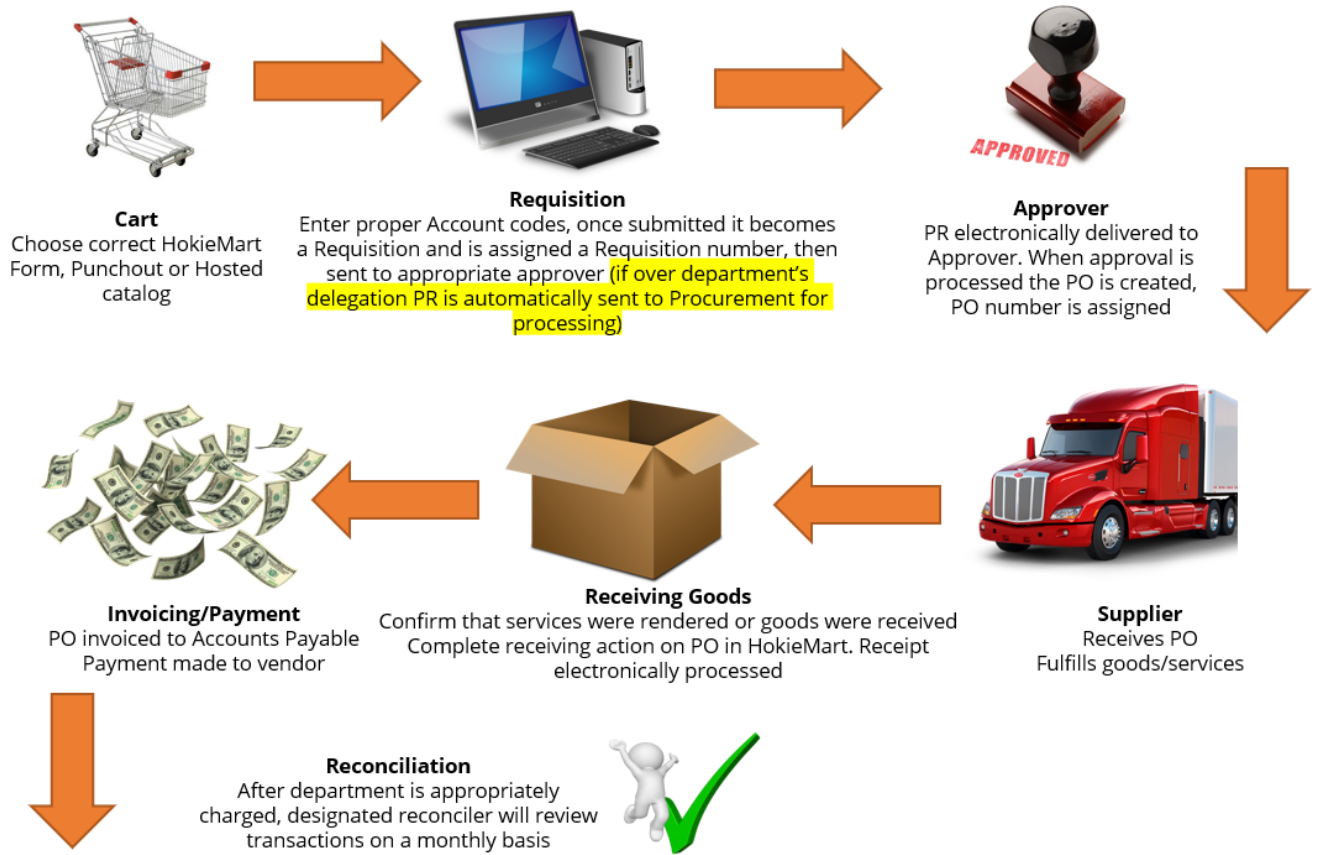
Typically, a single user may serve as both a Requestor and Receiver. Usually, an Approver has only that single role.

HokieMart provides a central receiving process for the entire university. All invoices created in HokieMart are sent directly to the Controller's Office. Departments continue to receive invoices for direct payments and university contract transactions.

HokieMart is open to the entire university; there should be virtually no paper processing. The responsibility of each user is described in one of three guides:

- Requestor
- Approver, and
- Receiver

## HokieMart Workflow



## Navigation

Top of the Home Page (right side) – Snapshot of the system and items that need to be processed

The **Quick Search** bar is for locating documents by number

The **Heart** icon is used to access **My Bookmarks**, useful for frequently used forms

The **Bell** icon will include the number of **Notifications** you have

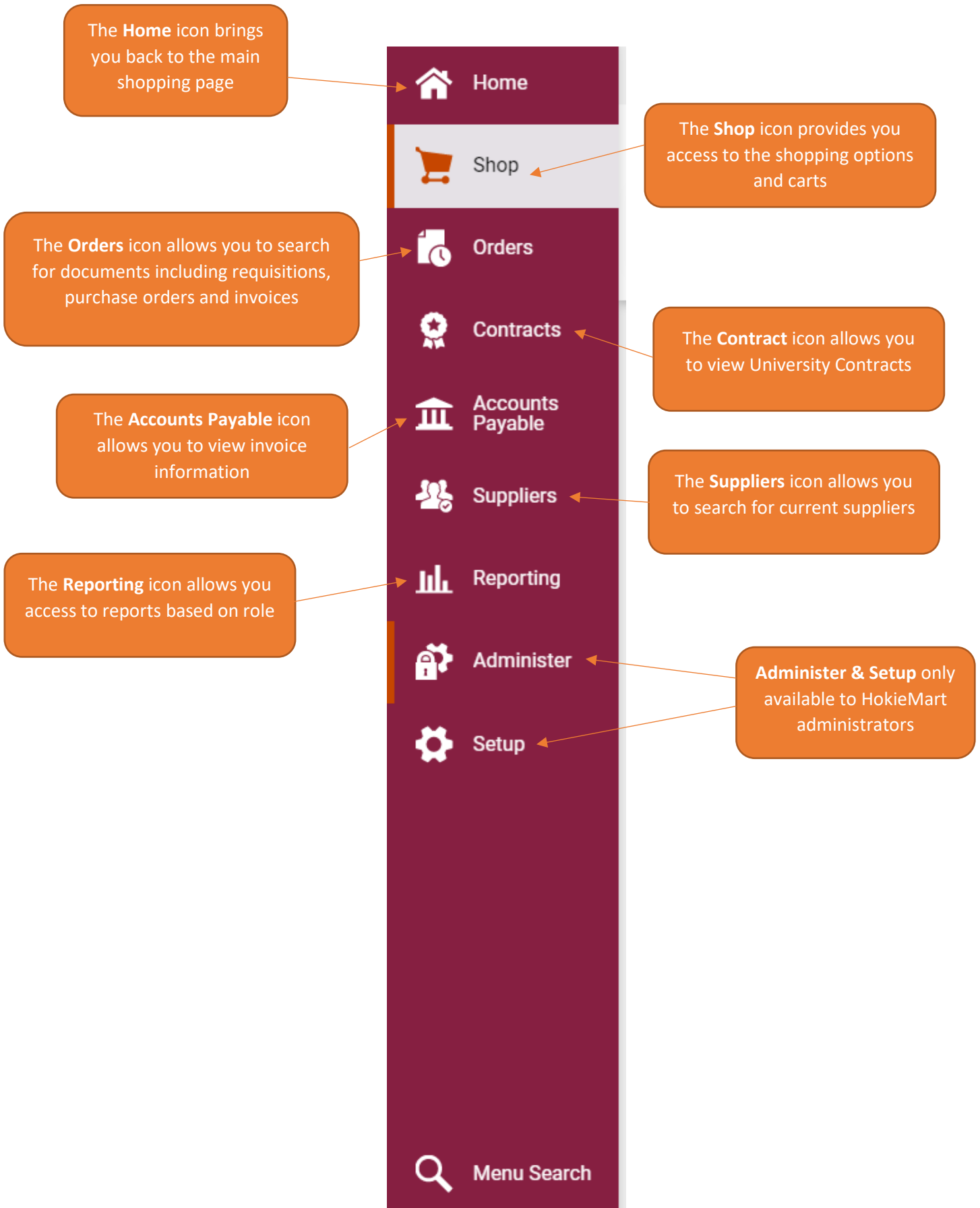
Use drop down arrow to narrow search



The **Cart** icon show the associated dollar value of items in your Carts

The **Flag** icon will include the number of **Action Items** you have to complete

The silhouette contains basic user information. Here you can **view your profile**

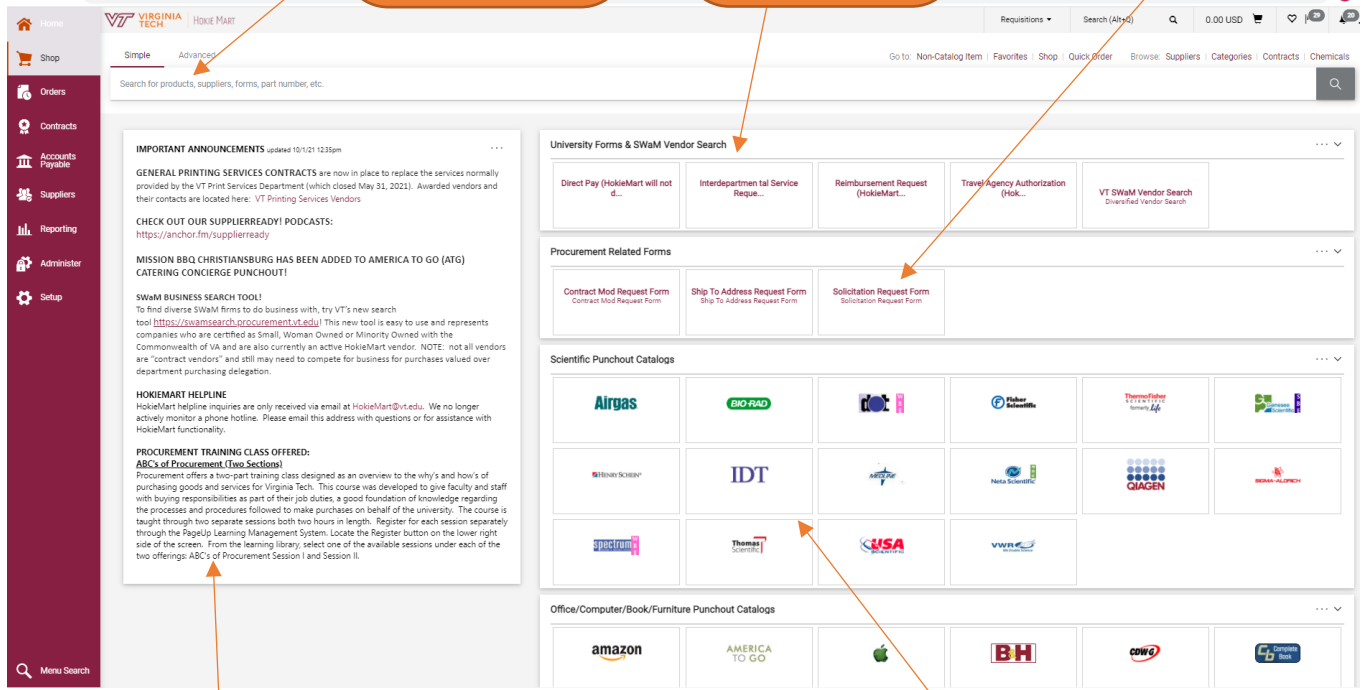


# Shopping Home Page

The Search Tool you can search for products, suppliers, forms and part numbers, etc

University Forms  
Direct Pay, ISR, Reimbursement Req, Travel Auth, VT Diverse Vendor Search

Procurement Forms  
Ship to Address Request Form, Contract Mod Request Form, Solicitation Request Form



The Organization Message displays announcements from Procurement

The Featured Suppliers Shows tiles of Punchout and Hosted catalog suppliers





## Searching for Carts, Orders and Documents

There are several ways to search for Carts (Items that have not been submitted for a requisition) and Pending Orders/Requests (Items that have been submitted as a requisition).

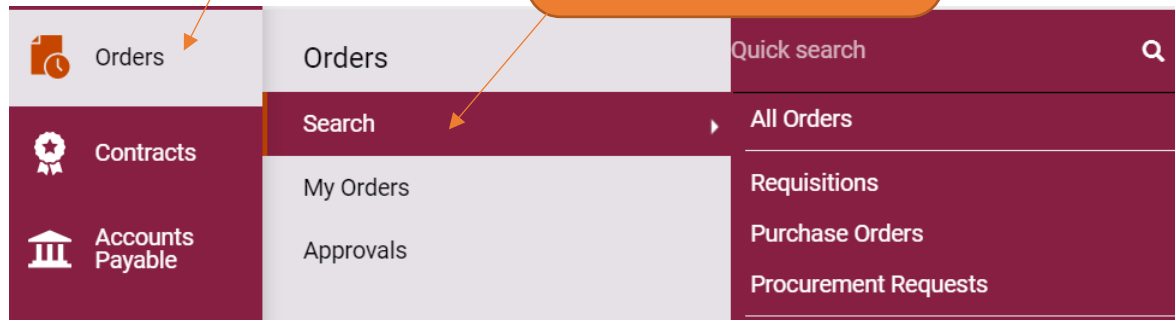
The image shows a screenshot of the Hokie Mart web application interface. The left sidebar contains navigation items: Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Reporting, Administer, and Setup. The main content area shows a breadcrumb trail: Shop > My Carts and Orders > View My Orders (Last 90 Days). Below the breadcrumb, there are three menu items: Open My Active Shopping Cart, View Carts, and View My Orders (Last 90 Days). Four orange callout boxes with arrows point to these elements:

- (1) Go to the left bar and select **Shop**, then **My Carts and Orders**
- (2) Open **My Active Shopping Cart** which will show any cart that is in progress and not assigned
- (3) Open **View Carts** to see both **Active Carts** and **Carts Assigned**
- (4) Open **View My Orders** to view orders you have created in the past 90 days

## Orders Search

(1) Go to the left bar and select **Orders**

(2) Go to the **Search** which allow you to search for Requisitions, and Purchase Orders



(1) Filters are in the left column to narrow your search  
 (2) Another option is available to Add Filter

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount	Receipt Number	Invoice Status
P3991629	Amazon.com	10/22/2021 2:17:20 AM	Completed	150214502	Danielle Harlow	Sent To Supplier	-	41.22 USD	-	No Invoices
P3990604	The Supply Room Companies Inc	10/20/2021 2:45:12 PM	Completed	150178859	Danielle Harlow	Sent To Supplier	-	129.20 USD	31031784	Fully Invoiced
P3987971	America To Go	10/15/2021	Completed	149977270	Danielle	Sent To	-	648.56 USD	30949118	Partially

Find previously saved searched on the left side under **Manage Searches** by clicking on My Searches

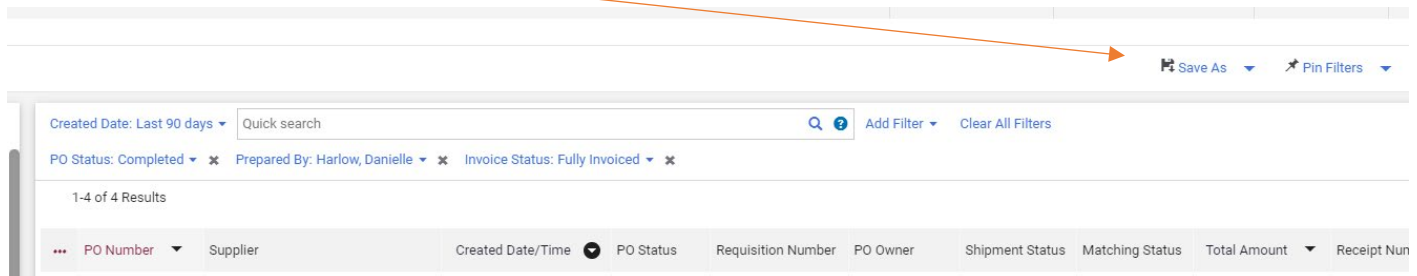
Use the Gear on the right side to create a custom filter and reorder columns



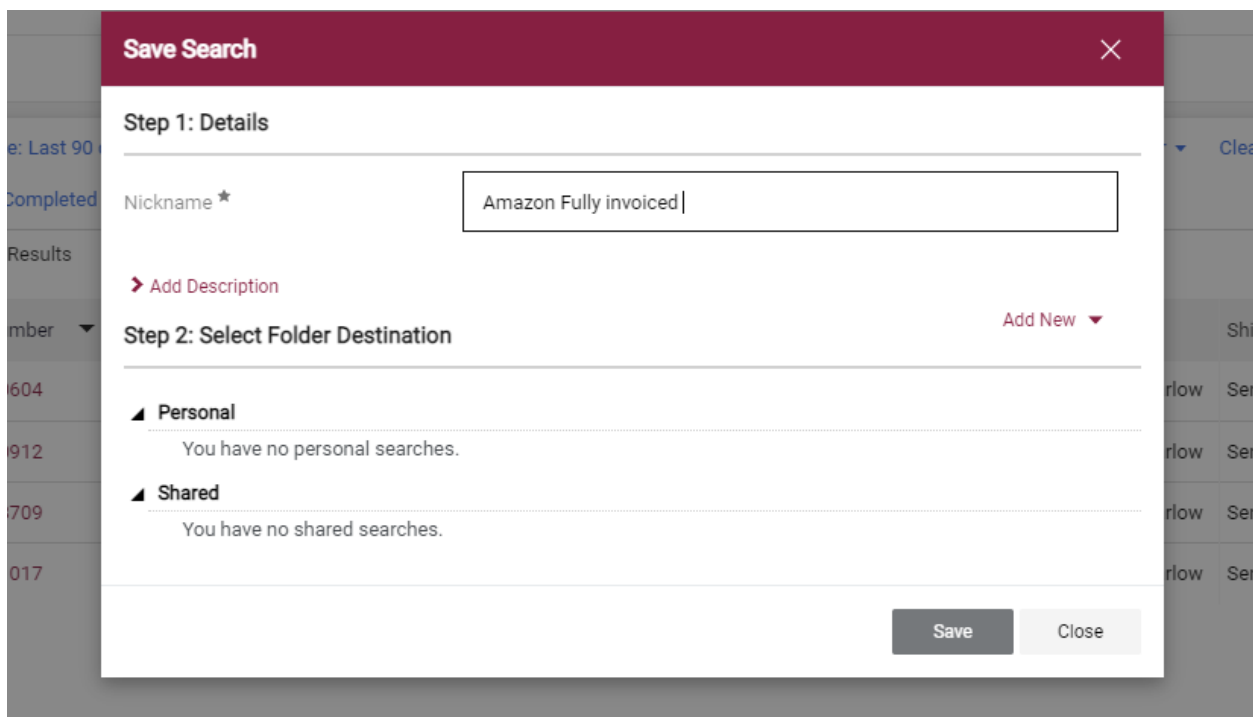
## Saving a Search

To save a custom search after filters have been selected.

- Select the "Save As" icon



- Save the search with a Nickname so you can easily identify it for future uses.



- Select Save

## User Roles

Roles in HokieMart are assigned to a particular user based on information received from departments and levels of responsibilities within individual departments and are controlled within the HokieMart application.

### Requestor

The Requestor is the individual (user) who initiates the electronic purchase of goods and services by shopping and creating a “cart.” The Requestor has numerous sources to search for commodities and services and place the chosen items in a “shopping cart.” After placing these items in the “shopping cart” the Requestor will “check out.” After “check-out” is complete, a Purchase Requisition (PR) is created.

### On Behalf-of-Requestor

An On Behalf-of- Requestor is an individual who initiates the electronic purchase of goods and services “on behalf of” the Requestor who is authorized to use HokieMart.

### Approver

An Approver is an individual designated to electronically review/edit and approve purchase requisitions within the delegated purchasing authority. The Approver electronically receives the PR for approval. After verification, the Approver may approve the PR or reject part/all of the PR. Approval of the PR creates a Purchase Order (PO) that is electronically delivered to the vendor.

### Receiver

The Receiver verifies receipt of goods/services. All or part of the order may be received depending on delivery (backorders, damaged goods, etc.). The Receiver enters HokieMart and electronically “receives” the goods/services.

### Delegated Purchasing Authority

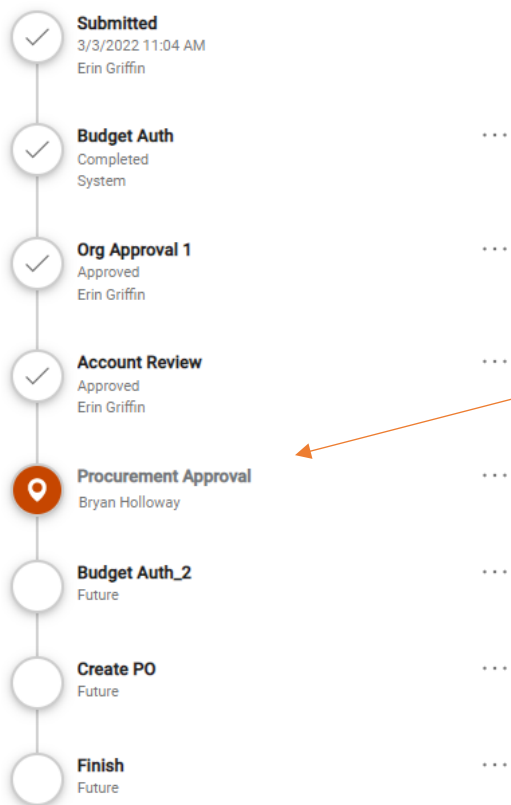
University **Policy 3015, Contract Signature Policy and Procedures**, delegates to department heads the authority to enact purchases of goods and services valued up to \$10,000 per transaction. Department heads may select faculty and staff within their department to exercise this authority. However, the department head remains responsible for the correct exercise of delegated purchasing authority and must ensure that personnel are properly trained and supervised; that all rules and procedures are followed; and that prices being paid are fair and reasonable.

At dollar amounts up to \$10,000, price competition among vendors is not required, but is certainly encouraged. Once the vendor is selected, a firm fixed price, inclusive of all charges for handling, shipping, tax (if any), etc., should be determined and a HokieMart requisition prepared.

### Purchase Requisitions Exceeding \$10,000

When a Purchase Requisition (PR) exceeds the ten-thousand-dollar (\$10,000) limit and the supplier is not a contract supplier, the PR will automatically be routed in the workflow to the Procurement Department after approval(s) by the organization.

The buyers in the Procurement Department will process the PR.



You will see the step “Procurement Approval” in the workflow for requisitions that are above departmental delegation. Once a requisition has been assigned to a buyer, you will see that buyer’s name.

For orders that require processing by an ITPALS buyer, you will see the workflow step “ITPALS Approval.”

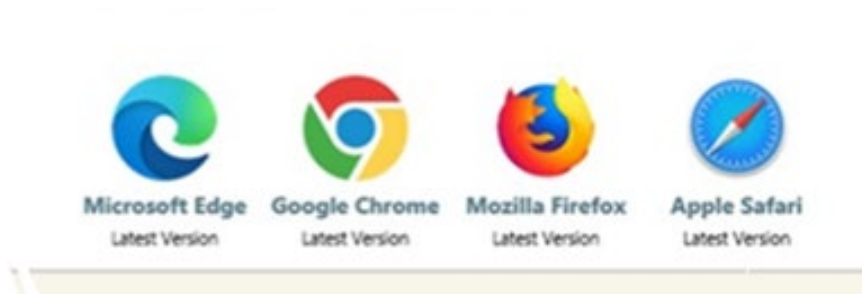
## System Requirements

### Web Browsers

HokieMart is a web-based product and is used in conjunction with the Internet. Users may access HokieMart from either a PC or Mac.

The following browsers are currently supported by Jaggaer for use of HokieMart:

- Microsoft Edge
- Google Chrome
- Mozilla Firefox
- Apple Safari





*Please note: iPad is supported by Jaggaer, however, not all Supplier punch-out sites will support the use of this device. Additionally, although Safari is supported by Jaggaer, not all Supplier punch-out sites will support this browser.*

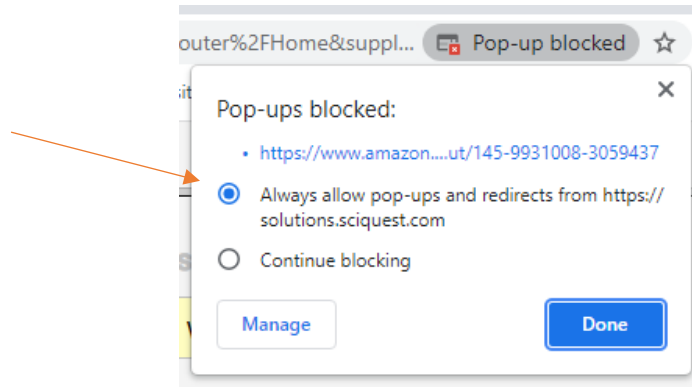


## Popup Blockers

Popup blockers should be disabled when using HokieMart. Some of the punch-out sites open in a new window and will not open if you have popup blockers enabled.

If you are unable to open a punchout and see this icon  in your web address, your browser is blocking pop-ups from HokieMart.

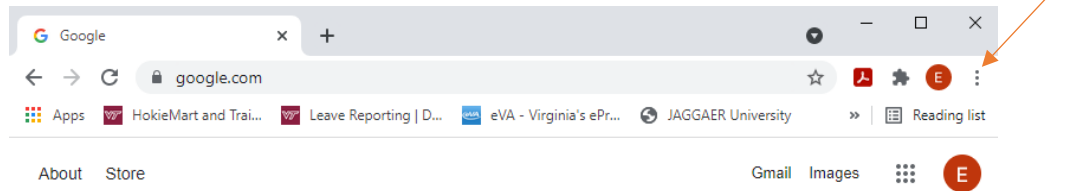
Click on the  icon and select “Always allow pop-ups and redirects from **<https://solutions.sciquest.com>**” to enable pop-ups from HokieMart. Doing this will save your settings when accessing HokieMart in future sessions.



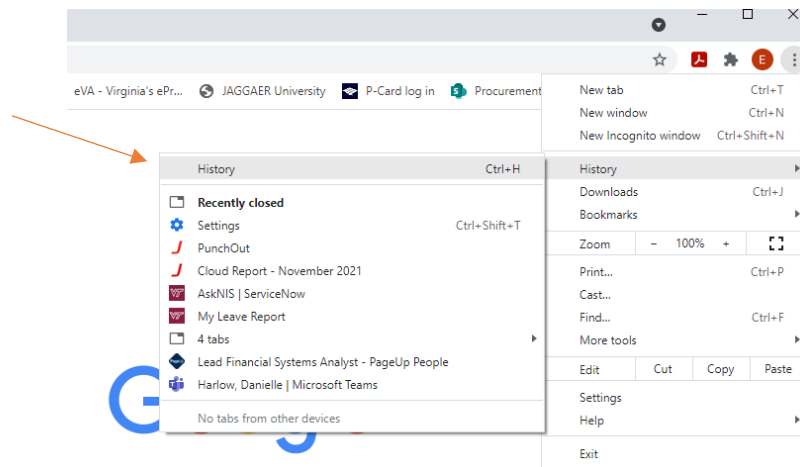
## Troubleshooting

If you're experiencing difficulty with pages loading in HokieMart, try clearing your browser history.

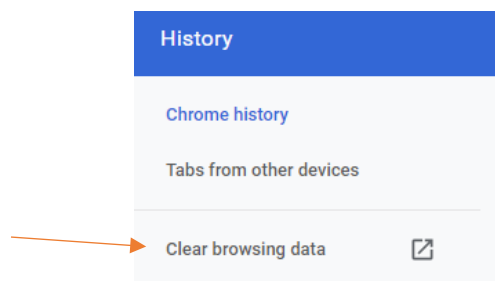
Click on the Tools menu for your browser.



Click on "History"



Click "Clear browsing data"

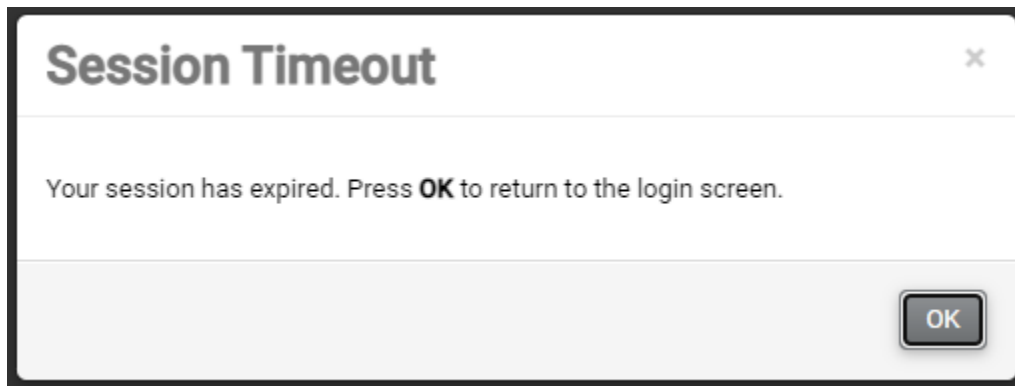


Open a new session of the browser and try accessing HokieMart again.

If users are experiencing outages or additional issues with HokieMart, they should report them to [hokiemart@vt.edu](mailto:hokiemart@vt.edu).

## Time-Out Sessions

HokieMart will time-out after one hour of inactivity. If a user has not been active in the application during that time period, the application will become inactive and the user must log in again.

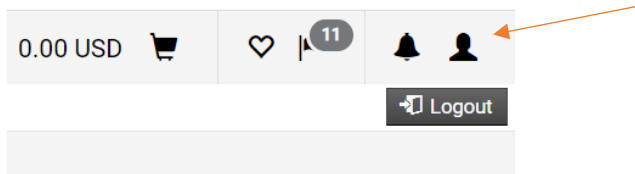


It is important to note that individual punchouts have time-out periods. These, however, are determined by the vendor. It is suggested that if users will not be active in HokieMart for an extended period of time, they should save the cart.

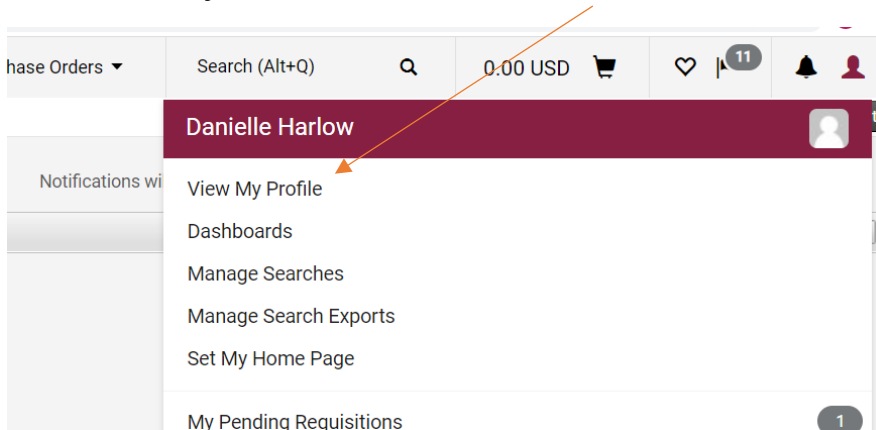
# User Information and Settings

## My Profile

To access your profile settings, select the silhouette icon in the upper right-hand corner



Select "View my Profile:



User's name, phone number, email, etc. is set up at the time your access to HokieMart is granted. Users cannot edit this information themselves. If changes are needed, send an email to General Accounting in the Controller's office [genactg@vt.edu](mailto:genactg@vt.edu).

**User's Name, Phone Number, Email, etc.**

First Name	Erin
Last Name	Griffin
Phone Number	<input type="text" value="+1 540-231-9028"/> <input type="text" value="ext."/> <small>International phone numbers must begin with +</small>
Mobile Phone Number	<input type="text"/> <small>International phone numbers must begin with +</small>
E-mail Address <sup>★</sup>	<input type="text" value="erinc93@vt.edu"/> <input type="button" value="✉"/>
Department	<input type="text" value="Procurement (Purchasing)"/>

## User Default Settings

There are defaults available for each user that will auto-populate within the current forms.

Once you have selected your profile, select “Default User Settings”

**Danielle Harlow**  
User Name danielleh

User Profile and Preferences <  
**User's Name, Phone Number, Email, etc.**  
 Language, Time Zone and Display Settings  
 Early Access Participation  
 Guided Tour Instructions  
 Default User Settings <  
 Custom Field and Accounting Code Defaults  
 Default Addresses  
 User Roles and Access >  
 Ordering and Approval Settings >  
 Permission Settings >  
 Notification Preferences >  
 User History >  
 Administrative Tasks >

**User's Name, Phone Number, Email, etc.**

First Name Danielle  
 Last Name Harlow  
 Phone Number  ext.   
International phone numbers must begin with +  
 Mobile Phone Number   
International phone numbers must begin with +  
 E-mail Address \*    
 Department   
 Authentication Method SAML  
 User Name \* danielleh

★ Required Save Changes

To add a department's fund codes as a default, select each tab and “Edit”

my Home > Custom Field and Accounting Code Defaults

**Danielle Harlow**  
User Name danielleh

User Profile and Preferences >  
 Default User Settings <  
**Custom Field and Accounting Code Defaults**  
 Default Addresses  
 User Roles and Access >  
 Ordering and Approval Settings >  
 Permission Settings >  
 Notification Preferences >  
 User History >  
 Administrative Tasks >

**Custom Field and Accounting Code Defaults**

Header (int.) Header (ext.) **Codes** Code Favorites Internal Information ?

Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		<input type="button" value="Edit"/>
└ OrgWF1	No Default Value		<input type="button" value="Edit"/>
└ UGType	No Default Value		<input type="button" value="Edit"/>
Account	No Default Value		<input type="button" value="Edit"/>
Activity	No Default Value		<input type="button" value="Edit"/>
Chart	U	University Chart	<input type="button" value="Edit"/>
Location	No Default Value		<input type="button" value="Edit"/>

Under the Codes tab, each field has “Edit” as an option. The only fields required when creating and processing a Purchase Requisition are **Fund** and **Account**. All HokieMart users must enter at least one **Fund** and **Account** combination. The department information,

known as Organization (Org) information, will populate automatically when the fund number is entered in the field. The system will only let the user enter fund information authorized by the Controller's office.

## Account Code Favorites

**Custom Field and Accounting Code Defaults**

Header (int.) Header (ext.) Codes **Code Favorites** Internal Information

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

Add

**Accounting Codes**

Chart	Fund	OrgWF1	Account	UGType	Location	Activity
<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

As accounts are selected by the user, they will appear in a list on the screen. **It is recommended that default account codes not be created.** Users should verify the account code when the requisition is being prepared.

Accounting Code Favorites allows a user to create a name for a saved combination of fund and account (and activity code if applicable).

- Enter the nickname for the new favorite being created.

- Enter the codes for the favorite such as fund code, account code, and activity code if applicable.
- Click the save button when complete.

When entering funding in a cart, the favorite can be used. Select the favorite code from the list as stated below which will default the saved values such as fund code, account code, and activity code.

This process should be helpful when splitting the same funds and account codes regularly.

## Default Addresses

The user's default address information should be populated prior to using HokieMart. The "Ship To" addresses in HokieMart are the current addresses in Banner. The only acceptable "Ship To" addresses allowed in HokieMart are official addresses previously determined by the University.

The screenshot shows the user profile for Danielle Harlow. The left sidebar contains navigation options: User Profile and Preferences, Default User Settings, Custom Field and Accounting Code Defaults, Default Addresses (highlighted), User Roles and Access, Ordering and Approval Settings, Permission Settings, Notification Preferences, User History, and Administrative Tasks. The main content area is titled 'Default Addresses' and features two tabs: 'Ship To' and 'Bill To'. Below the tabs, there is a text prompt 'Select an address to edit' and a button 'Select Addresses for Profile'. A dropdown menu titled 'Shipping Addresses' is open, showing a single entry 'default'. An orange arrow points from the text above to the 'Ship To' tab.

## Ship To

The "Ship To" address will be the address users would like the item(s) delivered. Some departments have just one "ship to" address that is used daily. For some departments, addresses will vary. For this reason, users will have the ability to select multiple default "Ship To" addresses.

To save a "Ship To" address to your profile in HokieMart, users are able to search all available addresses.

Click "Select Addresses for Profile." *Users may find it easier to enter their department name or building name in the "Address Text" field.*

Select "Search." Type in a key word(s) from the address you are searching. The text field is not case sensitive. The address information will then be displayed. Depending on information entered, the listing may be long.

The screenshot shows the 'Default Addresses' interface. At the top, there are tabs for 'Ship To' and 'Bill To'. Below this, there is a section for 'Select an address to edit' with a 'Select Addresses for Profile' button. The main area is divided into two columns. The left column, 'Shipping Addresses', shows a list with 'default' selected. The right column, 'Address Search', has a search box containing 'north end center', a 'Results Per Page' dropdown set to '10', and a 'Search' button. Below the search box, it says 'Addresses Found: 17' and 'Page 1 of 2'. The search results are listed in a table with columns for 'Name' and 'Address'. Three results are shown, each with a radio button for selection. The first result (ID 0176) is selected. The address details for the selected result are: Contact Name, Phone +1 540-231-8548, Email danielleh@vt.edu, Equity and Access, North End Center Ste 2300, 300 Turner St NW, Blacksburg, VA 24061, United States.

To add the address to your profile

- Place the cursor in the "radio" button and click. The address will be displayed.
- The users name field will default to ".". Type users name in **Contact Name** field. So that this will display on Purchase Requisitions (PR's).
- Click "Save."



## Default Addresses

Ship To Bill To

Select an address to edit Select Addresses for Profile Delete Address

**Shipping Addresses**

default

**Edit Selected Address**

Nickname

Default

Current Default Address default

**ADDRESS**

Contact Name \*

Phone

Email \*

Address Line 1

Address Line 2

Address Line 3

City

State

Zip Code

Country

Save

If only one address is needed, it will appear as the default. If additional addresses are necessary, users have the ability to select a particular address as their default.

Users have the ability to select multiple “Ship To” addresses based on their needs and the needs of their department.

To select additional addresses:

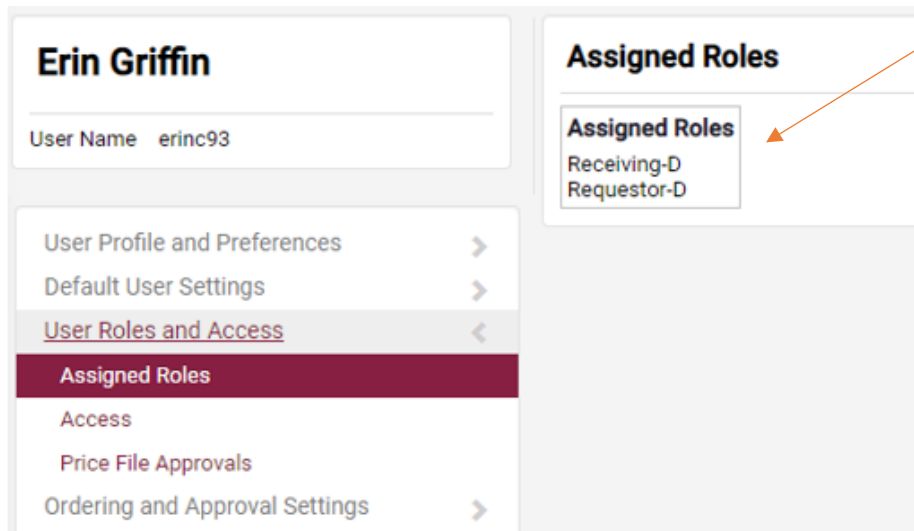
Select Addresses for Profile

- Click “Select Addresses for Profile”
- Follow the above steps for adding address information.

## Assigned Roles

Roles are assigned to a particular user based on information received from departments and levels of responsibilities within individual departments and are controlled within the HokieMart application.

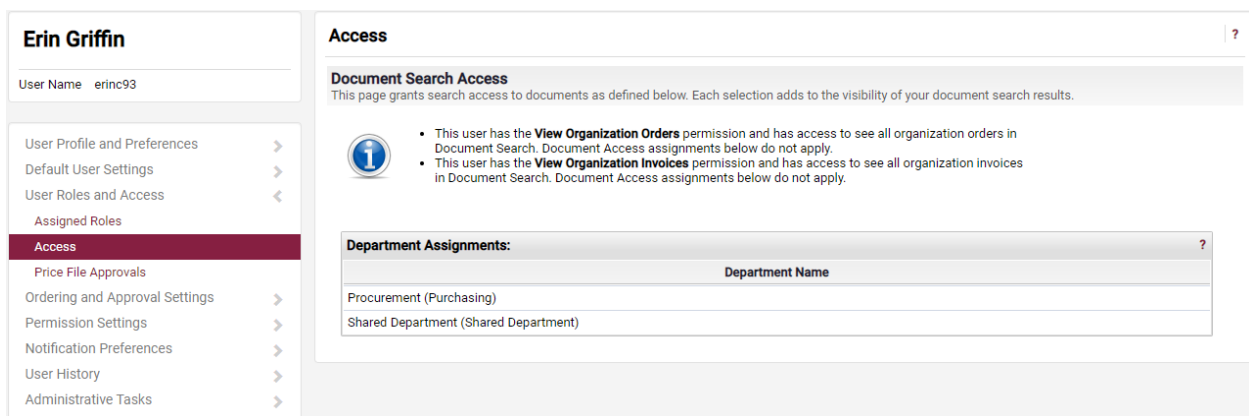
To view your assigned role(s), click on “Assigned Roles” under the “User Roles and Access” option.



If roles need to be changed or updated, complete the appropriate HokieMart [Access Request Form](#) and mail it to the Controller’s Office.

## Access

The Access page displays the level of visibility the user has been granted when conducting a search for documents, such as purchase orders and requisitions.



## Notification Preferences

When actions are performed in HokieMart, emails can be generated to notify users of these actions. We recommend users check these email notification boxes to increase the level of individual notification. To edit notifications preferences, access your profile in HokieMart.

- Select “View My Profile”
- Navigate to the notification preferences section

The screenshot shows the user profile for Danielle Harlow. The left sidebar contains a navigation menu with 'Purchase Orders' highlighted. The main content area is titled 'Notification Preferences: Purchase Orders' and displays a list of notification types and their corresponding notification levels. An orange arrow points from the 'Purchase Orders' menu item to the notification list.

Notification Type	Notification Level
Prepared By - PO Workflow complete	Email & Notification
Prepared By - PO sent to Supplier	None
Prepared By - PO line item(s) rejected	Email & Notification
Prepared By - PO rejected	Email & Notification
PO submitted into Workflow	None
PO pending Workflow approval	Notification
PO Workflow Notification available	None
PO Workflow complete	Email & Notification
PO sent to supplier	None
PO Confirmation/Acknowledgement	None
PO Line Item Ship Notice	None
PO line item(s) rejected	Email & Notification
PO rejected	Email & Notification
PO line item Backorder notice	None
PO line item Cancellation notice	None

The notification preferences are categorized by type. Select the type (ex. Shopping, Carts & Requisitions) and select edit section.

This close-up screenshot shows the 'Edit Section' button, which is a pencil icon followed by the text 'Edit Section' and a question mark icon. An orange arrow points to this button. Below the button, the first few rows of the notification preferences table are visible.

Notification Type	Notification Level
r - PO Workflow complete	Email & Notification
r - PO sent to Supplier	None
r - PO line item(s) rejected	Email & Notification
r - PO rejected	Email & Notification

In the edit section select the type of notification you would like to modify from the drop down (none, email, notification or email & notification).

**None (Default)** – no notifications are delivered by the system

**Email** - will send an email to your email address

**Notification** – will add a notification to the Notifications Menu on the top of the HokieMart page.

**Email & Notification** – will do both listed above (recommended).

Event	Default	Override	Notification Type
Prepared By - PO Workflow complete	<input type="radio"/>	<input checked="" type="radio"/>	Email & Notification
Prepared By - PO sent to Supplier	<input checked="" type="radio"/>	<input type="radio"/>	None
Prepared By - PO line item(s) rejected	<input type="radio"/>	<input checked="" type="radio"/>	Email & Notification
Prepared By - PO rejected	<input type="radio"/>	<input checked="" type="radio"/>	Email & Notification
PO submitted into Workflow	<input checked="" type="radio"/>	<input type="radio"/>	None
PO pending Workflow approval	<input checked="" type="radio"/>	<input type="radio"/>	Notification
PO Workflow Notification available	<input checked="" type="radio"/>	<input type="radio"/>	None
PO Workflow complete	<input type="radio"/>	<input checked="" type="radio"/>	Email & Notification
PO sent to supplier	<input checked="" type="radio"/>	<input type="radio"/>	None
PO Confirmation/Acknowledgement	<input checked="" type="radio"/>	<input type="radio"/>	None
PO Line Item Ship Notice	<input checked="" type="radio"/>	<input type="radio"/>	None
PO line item(s) rejected	<input type="radio"/>	<input checked="" type="radio"/>	Email & Notification
PO rejected	<input type="radio"/>	<input checked="" type="radio"/>	Email & Notification
PO line item Backorder notice	<input checked="" type="radio"/>	<input type="radio"/>	None
PO line item Cancellation notice	<input checked="" type="radio"/>	<input type="radio"/>	None

Once you have made your edits click the save changes button and you're done.



The Procurement Department recommends user select at minimum these nine (9) options:

**Related to Purchase Requisitions (PR's):**

- PR Workflow complete/PO created
- PR line items rejected
- Cart/PR rejected/returned

**Related to Purchase Orders (PO's)**

- PO Workflow Notification Available
- PO Workflow Complete
- PO Line item(s) rejected
- PO Rejected

**Settlement**

- Invoice Requires Receipt Notice
- Invoice line Item(s) Complete/Rejected

*Tip: If you would like an explanation of the notification, hover your mouse over the  icon next to each notification listed for a more detailed description.*

## **HokieMart Forms**

There are 7 basic forms that allow users to enter Purchase Requisitions in HokieMart. In this section, the various forms will be reviewed. The section entitled, Processing Orders in HokieMart will provide details on how to enter an order after selecting the correct form.

- |                   |  |                                |
|-------------------|--|--------------------------------|
| 1. Hosted Catalog | 4. Direct Pay                              | 7. Travel Agency Authorization |
| 2. Punch-out      | 5. Interdepartmental Service Request (ISR) |                                |
| 3. Non-Catalog    | 6. Reimbursement Request                   |                                |

It is important to understand the use of each form type so that when you enter your order, you are choosing the appropriate form. Choosing the wrong form can lead to cancellations and delays in processing.

### **Types of Suppliers**


There are three basic types of vendors/suppliers in HokieMart:

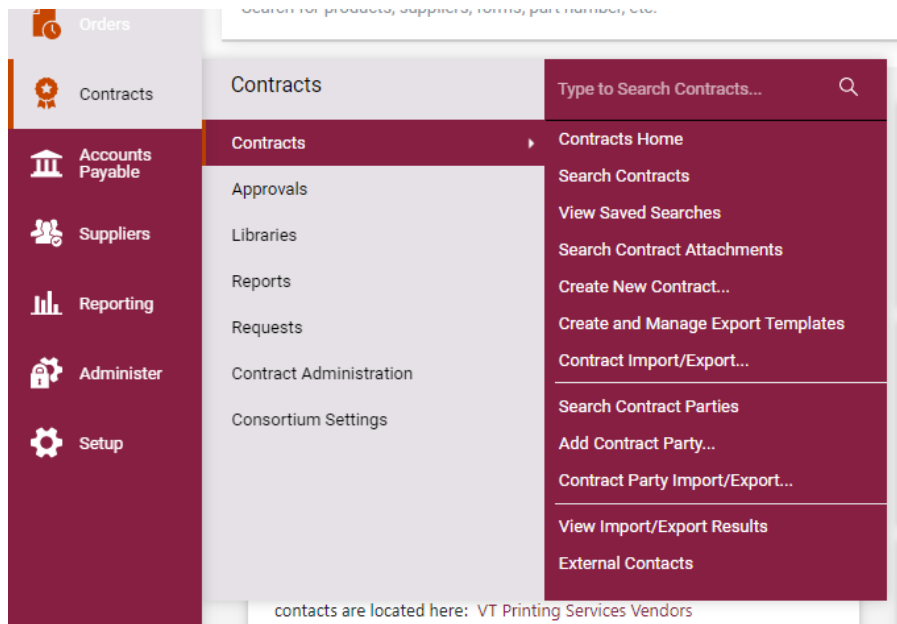
- Hosted Catalog Suppliers,
- Punchout Suppliers, and
- Non-Catalog Item Suppliers.

The type of suppliers you select will dictate the manner in which you search for products and process your order in HokieMart.

Some suppliers have negotiated contracts with Virginia Tech or other state agencies. The next section will cover more detail on how to search for suppliers with contracts and how to add those contract numbers on to your requisitions.

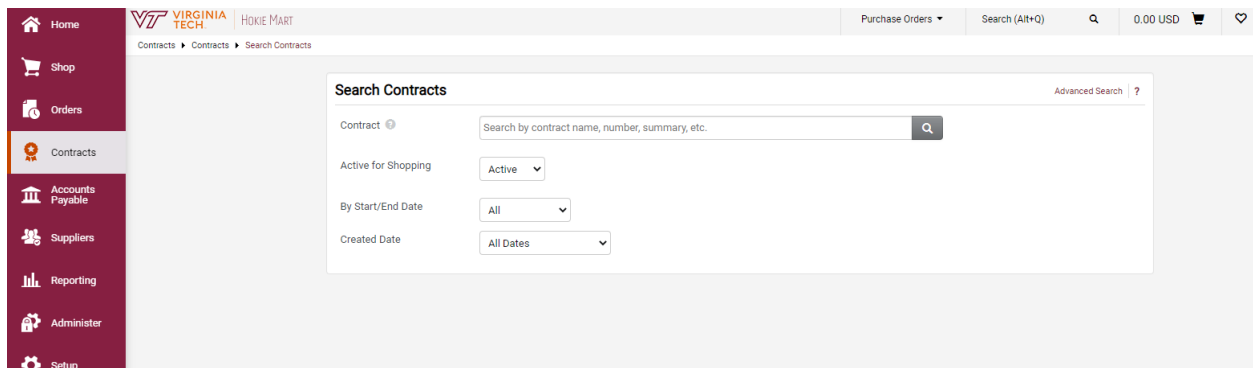
## Contract Suppliers

University contract suppliers are distinguished by the symbol  to the right of the vendor. Examples of contract suppliers are Fisher Scientific, Sigma-Aldrich, and VWR International. University departments have unlimited purchasing authority when using contract suppliers with the exception of a \$100,000 limit on the purchase of computers from the suppliers Apple and Dell.



Using the contracts feature in HokieMart will allow users the ability to:

- view contracts available to their department
- review information about a contract (dates, description, etc.)
- search for a contract







## Selecting a Contract on a Requisition

When entering an order in HokieMart, the contract number will automatically populate on your requisition when the contract is a university- wide contract (available for all users).

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 8242-BX Blue DoodleBug Cleaning Pad, 5/box	PAD 8242-BX	5/BX	7.74	1 BX	7.74	...

ITEM DETAILS		Contract:	VTG-221-2021	Internal Note	no value
Manufacturer Name	3M			Internal Attachments	Add
Manufacturer Part Number	08242			External Note	no value
UNSPSC	47-13-16-02			Attachments for supplier	Add

“Select contract” will appear only when a contract may be university-wide but not all good/services are included in the contract.

1 cleaning pads	EA	7.74	1 EA	7.74	...
-----------------	----	------	------	------	-----

ITEM DETAILS		Contract:	no value	Internal Note	no value
				Internal Attachments	Add
				External Note	no value
				Attachments for supplier	Add

To select a contract, select the pencil icon on the line item

Click on “Select contract.....”

**Edit Line 1: Item Details**

1 cleaning pads	EA	7.74	1 EA	7.74	...
-----------------	----	------	------	------	-----

Contract: [Select contract...](#)

Contract(s) available for assignment to this line.

Internal Note

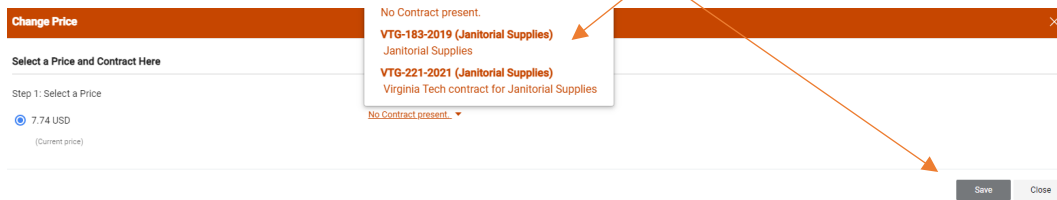
External Note

1000 characters remaining [expand](#) | [clear](#)

1000 characters remaining [expand](#) | [clear](#)

[Save](#) [Close](#)



Select the contract from the drop down list and Save.



## Viewing Contracts

These instructions will allow users to identify which contracts are available to them and whether they have visibility privileges to a specific contract. Privileges, full or partial viewing, will be possible.


From the Main Screen of HokieMart,

- Click on  on the task bar on the left-hand side of the screen as shown in the previous section.
- Enter desired supplier, item description, or contract name.
- Click .
- If you wish to view general information about all contracts, select Search without typing in the search bar. A listing of all contracts will be displayed.

**Contract Search Results** ?

1-4 of 4 Results Sort by Best Match 20 Per Page

**Contract Details**

<b>BP91050</b> Office Supplies and Toner <span style="float: right;">Open Summary</span>					
Second Party:	Guy Brown prior to 10_1_2014 	Start Date:	10/1/2009	Version Type:	Original
Contract Type:	-	End Date:	7/31/2010	Renewal No.:	0
Status:	<b>Superseded</b>	Active for Shopping:	Yes	Amendment No.:	0
				Extension Count:	0
<b>BP0040-A</b> Office Supplies and Toner <span style="float: right;">Open Summary</span>					
Second Party:	Guy Brown Products	Start Date:	12/1/2014	Version Type:	Amendment
Contract Type:	GPO	End Date:	10/31/2016	Renewal No.:	1
Status:	<b>Superseded</b>	Active for Shopping:	Yes	Amendment No.:	1
				Extension Count:	0
<b>BP0040-A</b> Office Supplies and Toner <span style="float: right;">Open Summary</span>					
Second Party:	Guy Brown Products	Start Date:	12/1/2014	Version Type:	Renewal
Contract Type:	GPO	End Date:	10/31/2016	Renewal No.:	1
Status:	<b>Superseded</b>	Active for Shopping:	Yes	Amendment No.:	0
				Extension Count:	0
<b>BP0040-A</b> Office Supplies and Toner <span style="float: right;">Open Summary</span>					
Second Party:	Guy Brown Products	Start Date:	11/1/2021	Version Type:	Renewal
Contract Type:	GPO	End Date:	4/30/2022	Renewal No.:	5
Status:	<b>Executed: In Effect</b>	Active for Shopping:	Yes	Amendment No.:	0
				Extension Count:	0

1-4 of 4 Results 20 Per Page

Click on the desired contract number for detailed information about the contract. In this example, Guy Brown was chosen.

Contract Details					
<b>BP91050</b>					
Office Supplies and Toner					
Second Party:	Guy Brown prior to 10_1_2014 ⚠	Start Date:	10/1/2009	Version Type:	Original
Contract Type:	-	End Date:	7/31/2010	Renewal No.:	0
Status:	<b>Superseded</b>	Active for Shopping:	Yes	Amendment No.:	0
				Extension Count:	0

---

<b>BP0040-A</b>					
Office Supplies and Toner					
Second Party:	Guy Brown Products	Start Date:	12/1/2014	Version Type:	Amendment
Contract Type:	GPO	End Date:	10/31/2016	Renewal No.:	1
		Active for Shopping:	Yes	Amendment No.:	1

## General Contract Information

Contracts are set up with the ordering address. Payment addresses against contracts may not be listed in the supplier search. Please choose the ordering address (usually the bold address) and the Controller's Office will process the payment to the correct payment address.

## Copier Contracts

*New Copier Purchase and First Year Maintenance Agreements:* Process new copier purchase and first-year maintenance agreements on a Non-Catalog Item form without selecting the contract. The Procurement Department will continue to process a university PO for copier rental or for the new copier and initial (first year) maintenance agreement.

*Copier Maintenance/Rental payments:* Process as a contract purchase by selecting the contract on the Non-Catalog form.

## Software and Equipment Maintenance Agreements

To make maintenance payments for software and equipment agreements for multiple years greater than \$2,000, process the Non-Catalog Item form selecting the original PO number generated for maintenance.

## Contract Warning Message

A warning message will be displayed to remind the user to select "HokieMart Will Deliver" or "User Will Deliver" (the user is now responsible for sending the PO to the vendor). After selecting the desired delivery method, proceed to complete the PR

## For Issues With A Contract

If you process a PR to a supplier which you believed to be a contract supplier, but the contract selection process is not available, please contact the HokieMart Helpline [hokiemart@vt.edu](mailto:hokiemart@vt.edu). Provide the supplier name and contract number. The problem will be researched and a response sent to the user, advising on the availability of this contract.



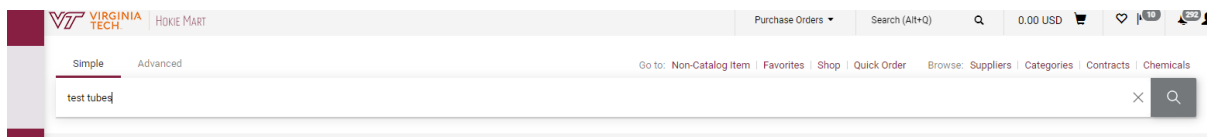
## Hosted Catalogs

### HokieMart Will Deliver OR User Will Deliver

Hosted Catalogs allow users to search for a particular item with suppliers who have a catalog housed within HokieMart. Items in a hosted catalog will show up in the shop section or you can access by using the catalog tile.

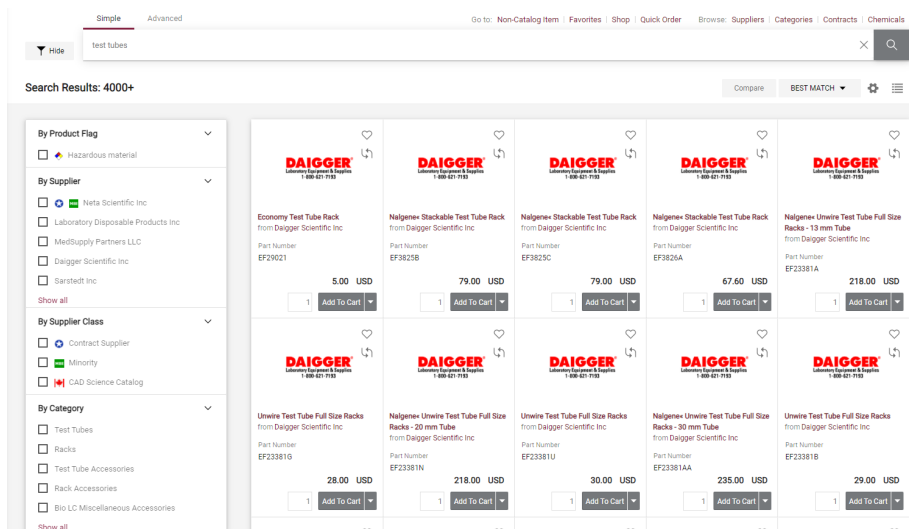
To use the simple search feature from the Shopping Home Page in HokieMart:

- Place the cursor in the field located in the upper center portion of the screen
- Enter an item description (for example “test tube”)

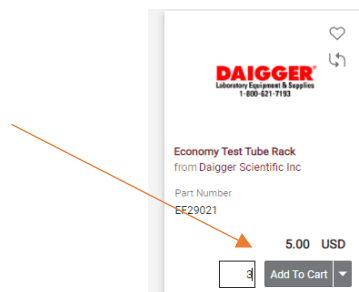


- Click the magnifying glass to search

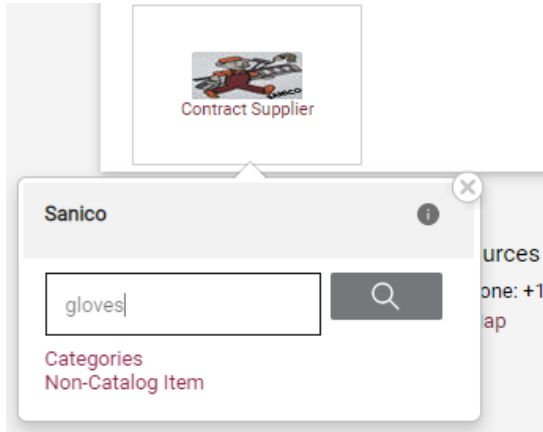
The requested search information will be displayed.



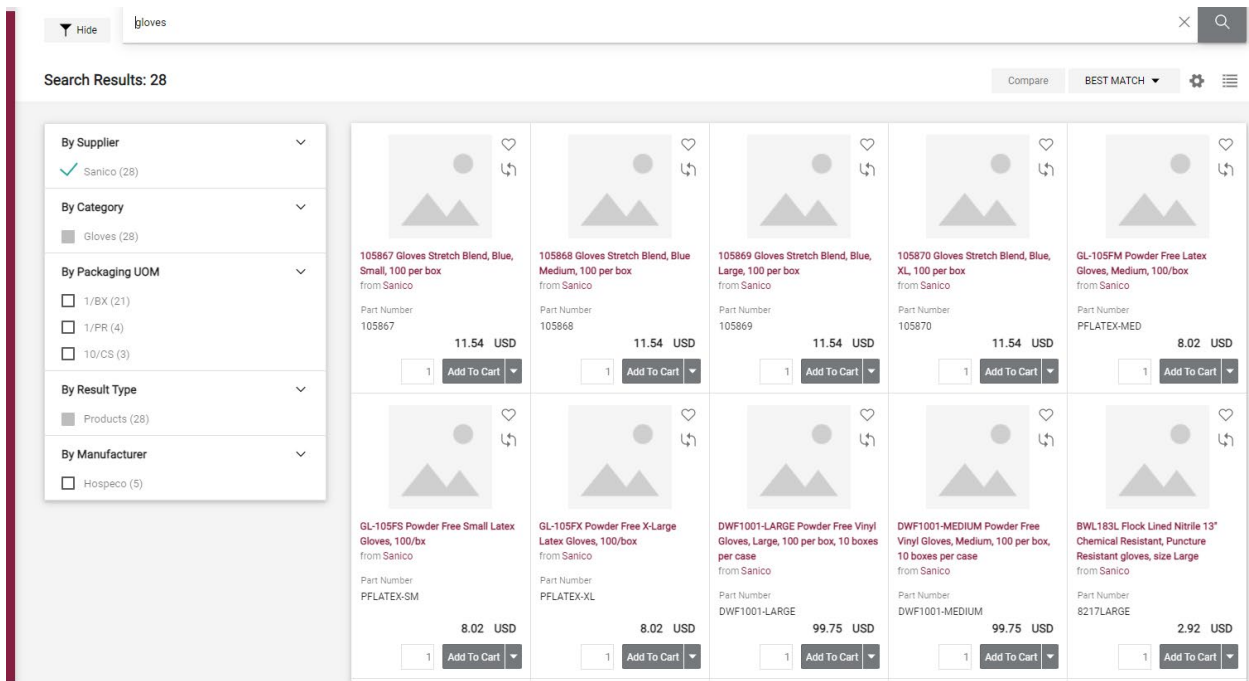
Scroll down to view all item options. Select the desired item and enter quantity and click “Add to Cart”

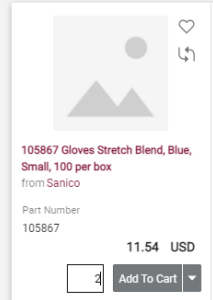


Preferred suppliers with hosted catalogs have an icon under the Hosted Catalog Suppliers section on the home page of HokieMart. To shop a hosted catalog from a preferred supplier, click on the icon/tile and enter what you are looking for in the search bar.



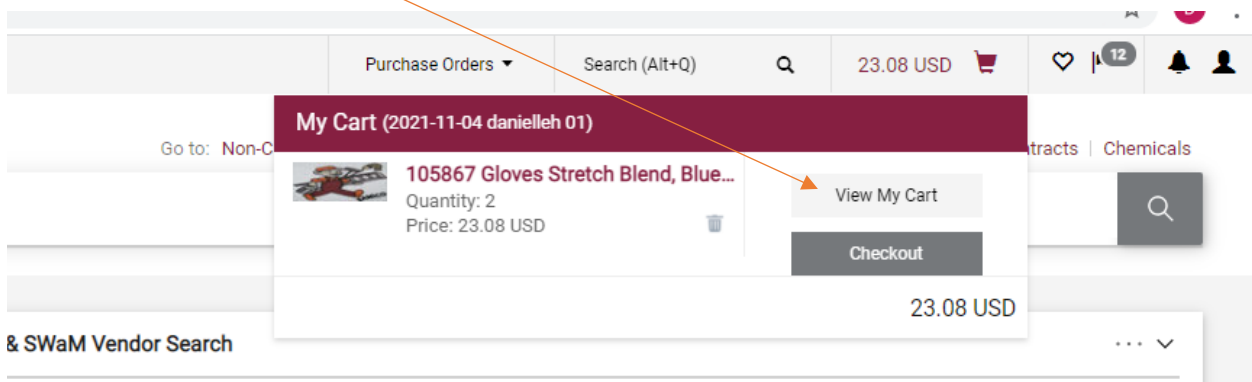
Click the magnifying glass to search





Select item and enter quantity and select “Add to Cart”

Once items have been added to your cart, you will need to select the Cart icon at the top and Select “View Cart”



You can select “Checkout” to proceed with submitting your requisition.

*Note: It is highly recommended that you utilize the Hosted Catalog suppliers who have a tile on the home page of HokieMart. These catalog suppliers offer Virginia Tech the best pricing and negotiated terms.*



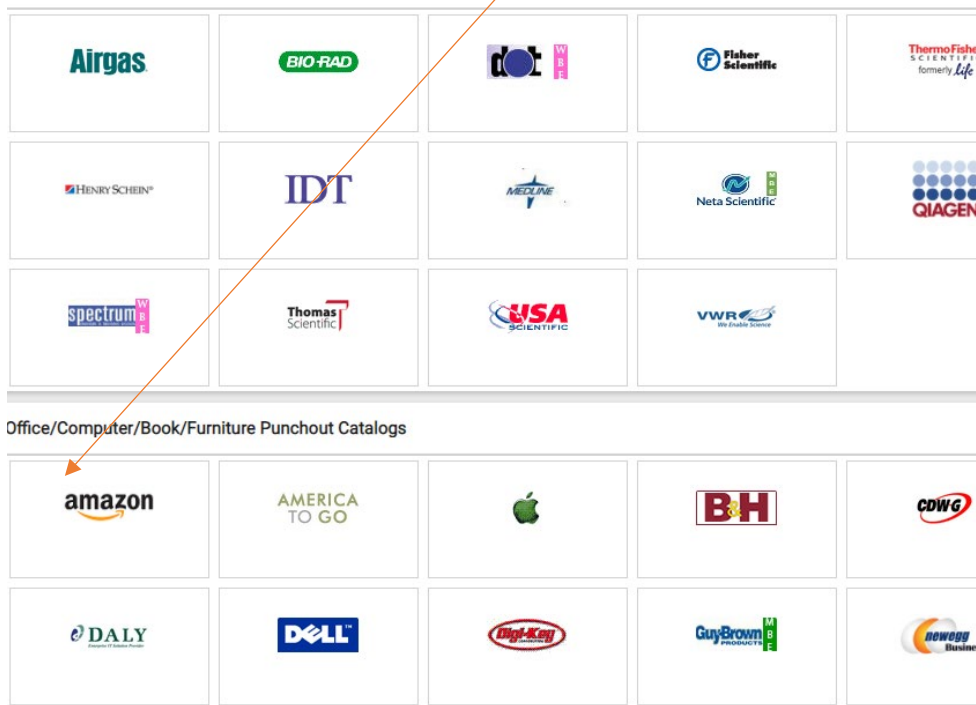
## Punchout Vendors

### HokieMart Will Deliver OR User Will Deliver

Punchout suppliers are contracted vendors and punchouts should be utilized whenever possible over using a non-catalog form. Punchouts have unlimited departmental purchasing authority EXCEPT for computer technology (Dell and Apple) which is capped at \$100,000.

Punch-outs are maintained on the Supplier's website. Click on the icon on for the supplier to be redirected to the Supplier's website.

- Select desire Punch-out supplier



Users will be directed to the supplier's website. When searching for items, the dollar value displayed will be the contract/discounted price. All of the Punchouts are similar, **but they are each a bit different in how items are placed into the shopping cart.**

It is important that when you are placing a punch-out order, you access the supplier's website via HokieMart.

When you punch out to a supplier site, enter the search criteria in the appropriate location, such as the suppliers search bar

Add your item to the cart and click the check out or cart button depending on which site you are utilizing

The screenshot shows the Amazon Business Prime search results for 'pens'. The search bar at the top contains 'pens' and the results are sorted by 'Featured'. The page displays various pen products, including Sharpie S-Gel pens and Paper Mate InkJoy pens. The left sidebar includes filters for Delivery Day, Climate Pledge Friendly, Department, Customer Reviews, Brand, and Price. The main content area shows product images, titles, and prices for several pen models.

Submit your cart for approval within the Supplier catalog

amazon.com SIGN IN SHIPPING & PAYMENT GIFT OPTIONS PLACE ORDER

### Review your order

**Warning:** This order requires approval.

**Information:** There are 2 important messages about your order.

- If your hours ever change at an address, click [Edit delivery preferen...](#)
- If tax exemption is applied to this order, you acknowledge your tax exemption...

**Group:** Punchout Users (Virginia Tech) [Change](#)

**Payment method:** [Change](#) Pay by Invoice

**Promotional Codes:**  Enter Code

**Shipping address:** [Change](#)  
 Contact Name Danielle Harlow, Phone +1 540-231-854  
 Procurement, North End Center Ste  
 2100, 300 Turner St NW  
 Blacksburg, VA 24061  
 United States  
 Phone:  
[Ship to multiple addresses](#)

**Submit order for approval**

By placing your order, you agree to the [Amazon Business Accounts Terms and Conditions](#) and [Amazon's privacy notice](#).

**Order Summary**

Items (2):	\$31.73
Shipping & handling:	\$0.00
<b>Total before tax:</b>	<b>\$31.73</b>
Estimated tax to be collected:*	\$0.00
<b>Order total:</b>	<b>\$31.73</b>

[How are shipping costs calculated?](#)  
 Prime shipping benefits have been applied to your order. (Why aren't all my items eligible?)

The Supplier will return the items to HokieMart and place it in your Cart at the top

Shopping Cart • Shopping Cart

Purchase Orders Search (Alt+Q) 31.73 USD Proceed To Checkout

Simple Advanced

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

Cart Name 2021-11-04 danielleh 01 Internal Note Danielle Harlow address Note to all Suppliers

Priority Normal 964 characters remaining expand clear

Send to Supplier? HokieMart Will Deliver 1000 characters remaining expand clear

Leave date blank unless next fiscal year order (then enter 07/01/2022) mm/dd/yyyy

Notify AP-Prepayment

Prepared for Danielle Harlow

Details

For Danielle Harlow

Estimate (31.73 USD)

Subtotal 31.73

Total 31.73 USD

### Tips:

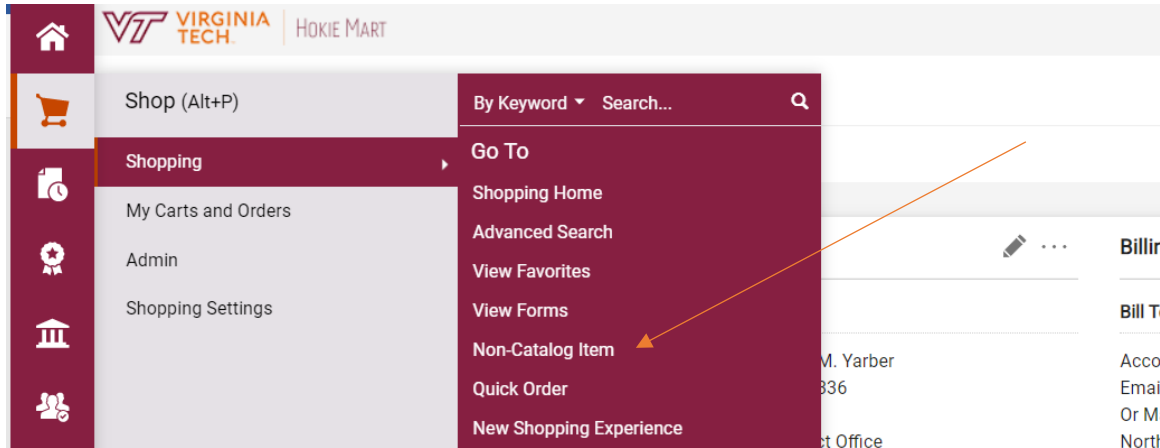
- *External Notes and Attachments cannot be used with punch-out PO's – suppliers will not receive any external notes or external attachments on punch-out PO's.*
- *User may NOT copy a cart that was created through a punch-out.*
- *After returning to the cart, users may NOT add or delete items in the cart of the punch-out.*

## Non-Catalog Item

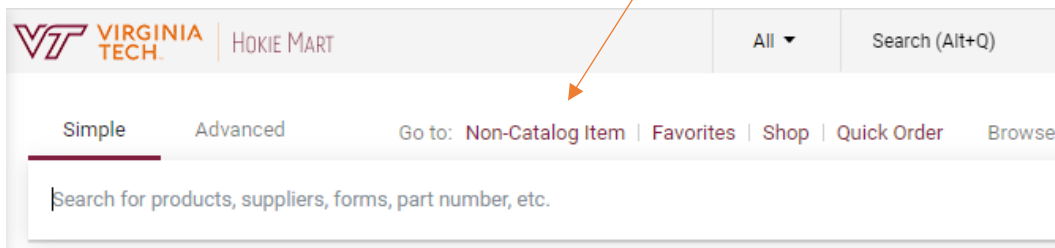
### HokieMart Will Deliver OR User Will Deliver

The Non-Catalog Item form allows users to purchase items that are non-travel-related and cannot be handled through the Hosted Catalog, Punch-outs, Direct Pay or Reimbursement Request form.

The Non-Catalog form can be found by selecting the cart icon under Shopping,

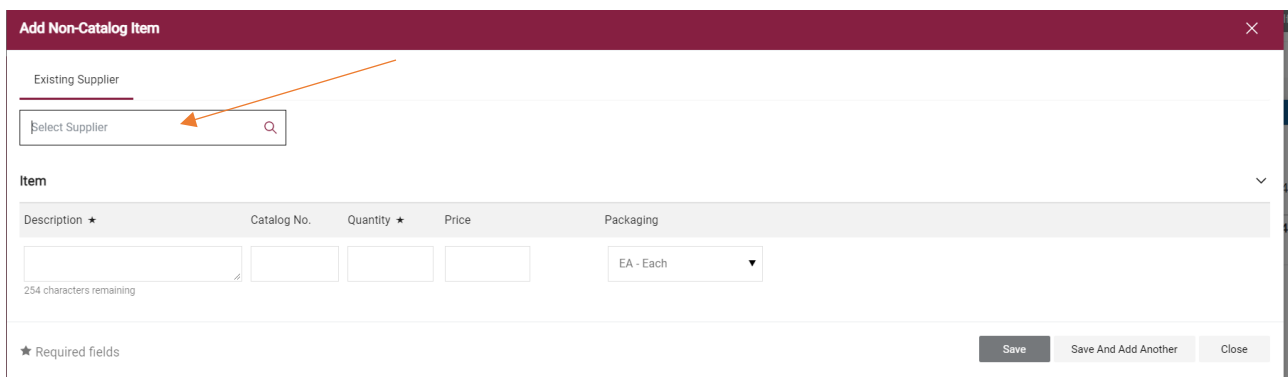


or on the home page of HokieMart



Select Non-Catalog Item to open a blank form.

A search box will be displayed allowing users to search for a particular supplier.



Begin entering a specific vendor. As the name is entered, possible matches will be displayed.

The screenshot shows the 'Add Non-Catalog Item' form. The 'Existing Supplier' field is active, and a dropdown menu is open showing search results for 'New River Of'. The results include 'New River Office Supply Inc', 'Community Foundation of the New River Valley', 'First Team Nissan of the New River Valley', and 'Women's Resource Center of the New River Valley Inc'. Below the dropdown, there are input fields for 'Quantity', 'Price', and a 'Packaging' dropdown menu set to 'EA - Each'. At the bottom, there are buttons for 'Save', 'Save And Add Another', and 'Close', along with a '★ Required fields' indicator.

Select the desired supplier.

*Note: If the supplier you are looking for is not available, please see the section on Adding New Supplier/Address.*

Next:

- Enter Product Description of the item(s) being purchased.
- Enter Catalog No. when available.
- Enter desired Quantity (cannot be zero - **0**).
- Enter a Price for the item(s). A dollar amount must be provided.
- From the drop-down menu, choose Packaging option if known (EA, LO, PK, etc.).

The screenshot shows the 'Add Non-Catalog Item' form with the 'Existing Supplier' field set to 'New River Office Supply Inc'. The 'Fulfillment Address' section is expanded, showing 'Order Address 2' with the address: '2605 Research Center Dr, Blacksburg, Virginia 24060 United States'. The 'Item' section is also expanded, showing a table with the following data:

Description *	Catalog No.	Quantity *	Price	Packaging
Legal size Paper	pp-ct-55	1	15.00	RM - Ream

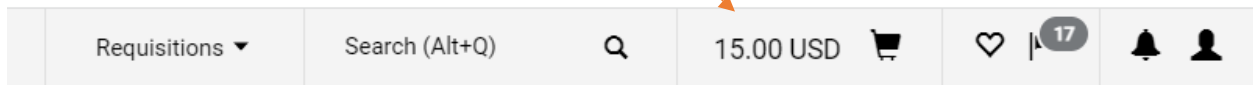
At the bottom, there are buttons for 'Save', 'Save And Add Another', and 'Close', along with a '★ Required fields' indicator.

When only one item is to be ordered,

- Click Save
- User will now be in the Home Screen of HokieMart.
- Click on the shopping cart icon in the upper right-hand corner of the screen to access the draft cart.

If multiple items are being ordered from the same vendor,

- Click Save and Add Another after adding each item.
- When finished shopping click Save
- User will now be in the Main Screen of HokieMart.
- Click on the shopping cart icon in the upper right-hand corner of the screen to access the draft cart.



[Item](#) | [Favorites](#) | [Shop](#) | [Quick Order](#)    [Browse: Suppliers](#) | [Categories](#) | [Contracts](#) | [Chemicals](#)

Users will now have the option to:

- View the cart and continue shopping or
- Go directly to the Requisition Summary screen which allows the requester to add funding information in the Cart Draft Requisition
- Complete the PR

## Direct Pay

### HokieMart will not deliver PO

Direct Pay is used only for item(s) explicitly listed on the Direct Pay Policy - [University Policy 3220](#).

- From the main Shopping Home Page select "Direct Pay"

University Forms & SWaM Vendor Search

Direct Pay (HokieMart will not d...)	Interdepartmental Service Reque...	Reimbursement Request (HokieMart...)	Travel Agency Authorization (Hok...
--------------------------------------	------------------------------------	--------------------------------------	-------------------------------------

Procurement Related Forms

Contract Mod Request Form Contract Mod Request Form	Ship To Address Request Form Ship To Address Request Form	Solicitation Request Form Solicitation Request Form
--	--	--

- Begin typing Supplier Name
- Select Desired Supplier

Direct Pay (HokieMart will not deliver PO) Available Actions: Add and go to Cart [Go] [Close] [Print]

**Supplier Info** ?

Enter Supplier: National Educational [X]

- National Educational Music Company
- National Association of Educational Procurement
- National Restaurant Associaton Educational Foundation ?

**Non-Configurable Fields**

General Info Instructions: Use this form for items obtained under the direct payment procedures. This includes: Utility Payments, Purchases from the US Post office, Licenses, and Animal Registration, purchases from other governmental agencies, etc. Detailed procedures can be found at this web site: [Direct Pay Procedures: Policy 3220](#)

Form Type: Direct Pay (HokieMart will not deliver PO)

Catalog No.: DP

Product Description: [Text Area] 254 characters remaining expand | clear

Quantity: 1

Packaging (UOM): EA - Each

Estimated Price: 0.00

**Configurable Fields**

Payment Category: A1 - Utility payments

Total 0.00

Next in the “General Info” section of the form, enter required information:

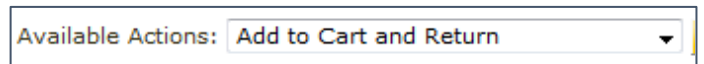
- Catalog No. - should display DP (Do not edit)
- Product description – type a description of what is being paid.
- Quantity - leave at 1. This is one payment.
- Packaging - most often will remain EA – each
- Estimated Price – the requestor should be in possession of an invoice or bill showing the total cost.
- Payment Category may be selected from the Payment Category drop-down list.

A screenshot of a web form's dropdown menu. The label 'Payment Category' is on the left. The selected option is 'A1 - Utility payments' on the right, with a small downward arrow icon.

- When complete, from the drop-down list on the top of the screen, click “Add and go to Cart.”

A screenshot of a web form's dropdown menu. The label 'Available Actions:' is on the left. The selected option is 'Add and go to Cart' on the right, with a small downward arrow icon.

- If additional items are to be ordered from the same vendor, click “Add to Cart and Return.” This will provide the user with the option to add additional items to the cart.

A screenshot of a web form's dropdown menu. The label 'Available Actions:' is on the left. The selected option is 'Add to Cart and Return' on the right, with a small downward arrow icon.

To finalize the Direct Pay once all items have been added, select “Add and go to Cart” from the Available Actions drop-down menu to return to your **Cart – Draft Requisition**.

User will now be in the **Cart – Draft Requisition**. Complete the cart to create the PR.



## Direct Pay (example)

Direct Pay (HokieMart will not deliver PO) Available Actions: Add and go to Cart Go Close

---

**Supplier Info** ?

**Supplier** National Association of Educational Procurement [more info...](#)  
[select different supplier](#)

**Fulfillment Address** Order Address 1: (preferred)  
450 Wireless Rd  
Hauppauge, NY 11788 US  
[select different fulfillment center](#)

**Supplier Phone** +1 (631) 273-2600

**Distribution**  
The system will distribute purchase orders using the method(s) indicated below:  
**Fax** +1 (631) 952-3660

---

**General Info** ?

**Non-Configurable Fields**

**General Info Instructions** Use this form for items obtained under the direct payment procedures. This includes: Utility Payments, Purchases from the US Post office, Licenses, and Animal Registration, purchases from other governmental agencies, etc. Detailed procedures can be found at this web site: [Direct Pay Procedures: Policy 3220](#)

**Form Type** Direct Pay (HokieMart will not deliver PO)

**Catalog No.** DP

**Product Description** 2014 Annual Membership for the department  
213 characters remaining [expand](#) | [clear](#)

**Quantity** 1

**Packaging (UOM)** YR - Year

**Estimated Price** 1,500.00

**Configurable Fields**

**Payment Category** A16 - Membership and association dues

**Total** 0.00

## Direct Pay Tips

### Memberships and Association Dues

Payment Category A16  
Account Code 12210

### Processing Payments to Other State Agencies

Payment Category A6  
Account Code 12440

### Payment to the U. S. Immigration and Naturalization Service

Payment Category A6  
Account Code 12472

### Purchasing Pitney Bowes Postage

Payment Category A2

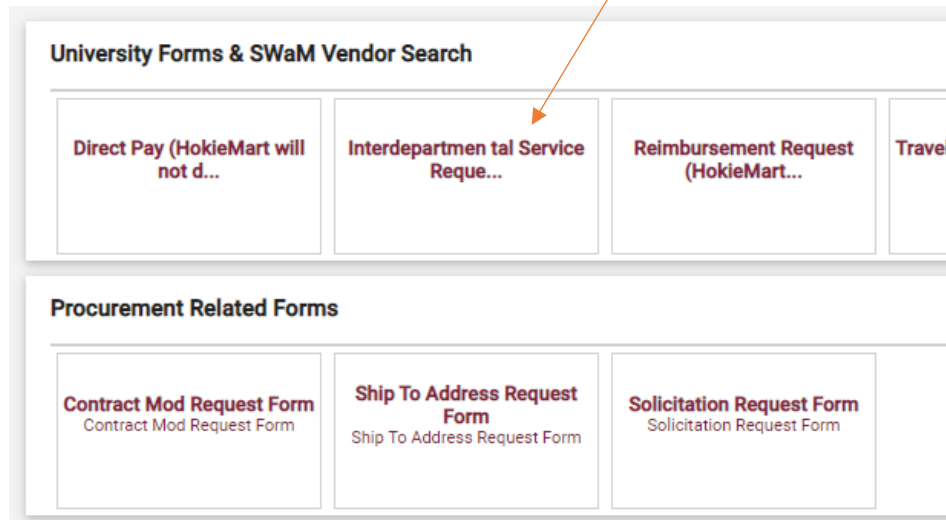
## Interdepartmental Service Request (ISR)

### HokieMart will deliver PO

The Interdepartmental Service Request (ISR) form is used to process orders to all university suppliers and Service Centers listed on the drop-down menu of the form. Service Centers/Suppliers are added on a continuous basis.

From the Main Screen of HokieMart:

- Select "Interdepartmental Service Request."



From the drop-down menu:

- Choose the desired VT supplier.
- Complete list of Virginia Tech internal university suppliers can be found at: [https://www.procurement.vt.edu/content/dam/procurement\\_vt\\_edu/hokiema/rt/Internal\\_Vendor\\_Listing.pdf](https://www.procurement.vt.edu/content/dam/procurement_vt_edu/hokiema/rt/Internal_Vendor_Listing.pdf)

The screenshot shows the 'Interdepartmental Service Request (HokieMart will deliver PO)' form. The 'Available Actions' dropdown is set to 'Add and go to Cart'. The 'Supplier Info' section is expanded, showing a dropdown menu for 'Supplier' with 'VT Personal Touch Catering' selected. Below this, the 'Fulfillment Address' is displayed as 'Order Address 1: (preferred) 17 Owens Dining Hall Blacksburg, VA 24061-0223 US' and the 'Supplier Phone' is '+1 (540) 231-5827'.

In the General Info section, enter all information.

- Catalog No. should display ISR (Do not edit)
- Product description allows the user to identify what is purchased.

- Quantity - leave at 1. This is one service request.
- Packaging defaults to EA – each
- Estimated Price – enter how much you think the request will cost

**General Info** ?

**Non-Configurable Fields**

General Info Instructions Use this form for Interdepartmental Service Requests. Include a general description of the goods or services you are requesting in Product Name/Description field.  
Interdepartmental Service Request (HokieMart will deliver PO)

**Form Type**  
**Catalog No.** ISR  
**Product Description** [Text Area] 254 characters remaining expand | clear  
**Quantity** 1  
**Packaging (UOM)** EA - Each  
**Estimated Price** 0.00

- Complete the “External Notes” portion of the form. If this portion is not completed, error messages will appear and the user cannot submit the PR. All areas are required.

**External Info** ?

External Info Instructions Include additional instructions under External Notes below.

**Service Required by:** [Date Field] mm/dd/yyyy  
**Department:** [Text Field]  
**Building / Room:** [Text Field]  
**Contact Name:** [Text Field]  
**Contact Phone:** [Text Field]

External Notes (1000 char) [Text Area] 1000 characters remaining expand | clear

External Attachments  
 add attachment...

**Total** 0.00

- If attachments are necessary, Click “add attachment.”

Browse and attach any document(s) that need to be sent with the ISR. These attachments must be done as **External Attachments**.

- Close the attachment box. The attachment name will appear in the box.

From the Available Actions drop-down menu:

- Click Add and go to Cart
- When finished shopping click Save and Close

User will now be in the Main Screen of HokieMart. Click on the shopping cart icon in the upper right-hand corner of the screen to access the draft cart.



User will now have the option to view the cart and continue shopping or go directly to the Requisition Summary screen which allows the requisitioner to add funding information in the Cart Draft Requisition. Complete the PR.

### **Account Codes for ISRs**

When entering ISRs for internal suppliers in HokieMart who are official University Service Centers, The account code on all transactions must always be 1244R. If an account code other than 1244R is entered on the ISR, the PO that was generated will be closed and you will be asked to process a new request through HokieMart with the correct account code. A complete list of official University Service Center HokieMart Suppliers can be found at the following link:

[https://www.procurement.vt.edu/content/dam/procurement\\_vt\\_edu/hokiemart/service\\_ctrs.pdf](https://www.procurement.vt.edu/content/dam/procurement_vt_edu/hokiemart/service_ctrs.pdf)

### **Receiving ISRs**

Please note that departments submitting ISRs to any Internal Service Unit through HokieMart **do not need to do receiving in HokieMart** or send a paper copy of the invoice to the Controller's Office. The individual service area will process the billings through Banner.

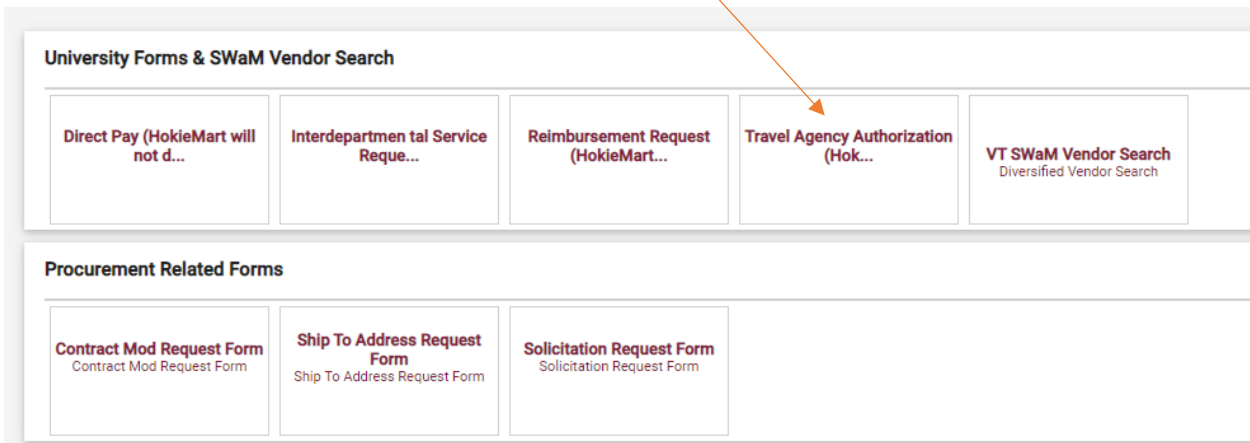
## Travel Agency Authorization

### HokieMart Will Deliver PO

Use this form to purchase airline tickets and other travel related services from contract travel agencies listed on the drop-down menu of the Travel Agency Authorization. **Do not use this form for travel reimbursements to university faculty or staff.** See the Controller's website for information related to travel and travel reimbursements.

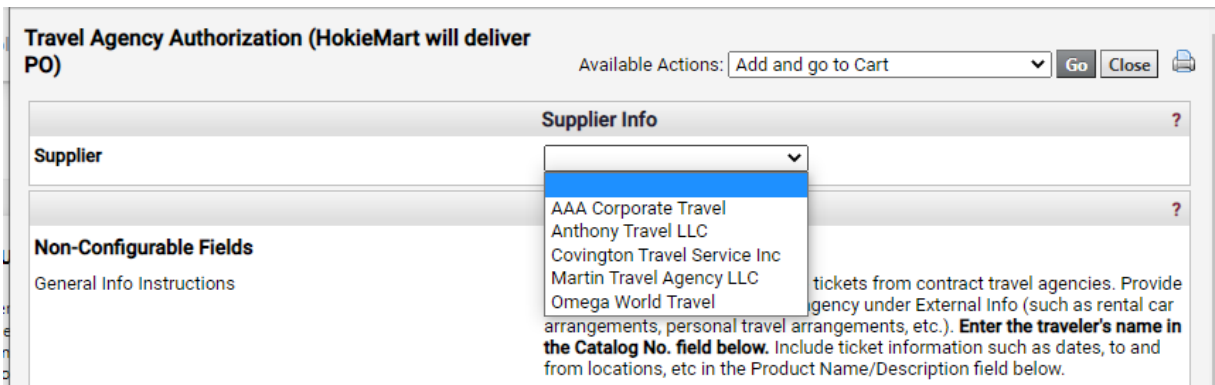
From Main Screen of HokieMart:

- Click Travel Agency Authorization



The screenshot shows the HokieMart main screen with two sections: 'University Forms & SWaM Vendor Search' and 'Procurement Related Forms'. In the first section, there are five buttons: 'Direct Pay (HokieMart will not d...', 'Interdepartmen tal Service Reque...', 'Reimbursement Request (HokieMart...', 'Travel Agency Authorization (Hok...', and 'VT SWaM Vendor Search Diversified Vendor Search'. An orange arrow points to the 'Travel Agency Authorization (Hok...' button. The second section, 'Procurement Related Forms', contains three buttons: 'Contract Mod Request Form Contract Mod Request Form', 'Ship To Address Request Form Ship To Address Request Form', and 'Solicitation Request Form Solicitation Request Form'.

- From the drop-down menu choose the desired contract vendor.



The screenshot shows the 'Travel Agency Authorization (HokieMart will deliver PO)' form. At the top, there is a title bar with 'Available Actions: Add and go to Cart' and buttons for 'Go' and 'Close'. Below the title bar is the 'Supplier Info' section, which has a dropdown menu open. The dropdown menu lists the following suppliers: 'AAA Corporate Travel', 'Anthony Travel LLC', 'Covington Travel Service Inc', 'Martin Travel Agency LLC', and 'Omega World Travel'. Below the dropdown menu is the 'Non-Configurable Fields' section, which includes 'General Info Instructions'. To the right of the dropdown menu, there is a text box containing the following text: 'tickets from contract travel agencies. Provide agency under External Info (such as rental car arrangements, personal travel arrangements, etc.). Enter the traveler's name in the Catalog No. field below. Include ticket information such as dates, to and from locations, etc in the Product Name/Description field below.'

Next in the "General Info" section of the form, enter required information:

- Catalog No. – type the traveler's name. Be sure to use legal name.
- Product Description is the location to provide information for the travel agent. Be as specific as necessary to ensure proper travel is arranged.
- Quantity will be 1. This will be for one traveler.
- Packaging - will remain EA – each
- Estimated price will be for the travel and all associated costs.

## Sample Travel Agency Authorization Form

Travel Agency Authorization (HokieMart will deliver PO) Available Actions: Add and go to Cart Go Close

Supplier Info	
Supplier	<input type="text"/>

General Info	
<b>Non-Configurable Fields</b>	
General Info Instructions	Use this form to purchase airline tickets from contract travel agencies. Provide additional instructions to travel agency under External Info (such as rental car arrangements, personal travel arrangements, etc.). <b>Enter the traveler's name in the Catalog No. field below.</b> Include ticket information such as dates, to and from locations, etc in the Product Name/Description field below.
Form Type	Travel Agency Authorization (HokieMart will deliver PO)
Catalog No.	<input type="text"/>
Product Description	<input type="text"/> 254 characters remaining expand   clear
Quantity	<input type="text"/>
Packaging (UOM)	EA - Each
Estimated Price	<input type="text"/>

Internal Info	
Internal Info Instructions	Purpose of trip.
Internal Notes (1000 char)	<input type="text"/> 1000 characters remaining expand   clear
Internal Attachments	add attachment...

External Info	
External Info Instructions	Enter additional travel agency instructions in External Notes.
External Notes (1000 char)	<input type="text"/> 1000 characters remaining expand   clear
External Attachments	add attachment...

Total 0.00

- Complete required information in the Internal and External Info section as necessary.
- Attachments may be added to Internal and External Info, such as an itinerary, if necessary.

To finalize the Travel Agency Authorization from the Available Actions drop-down menu, select:

- Click Add and go to Cart
- Then click Go

User will now be in the **Cart - Draft Requisition**. Complete the cart to create the PR.

# Processing Orders in HokieMart

Once the requestor has determined which HokieMart screen form is required to complete the desired electronic procurement transaction, this section will outline the steps to complete the Shopping Cart and finalize the Purchase Requisition (PR).

## Create the Cart

Choose the appropriate form from the HokieMart main screen

- You can search the Hosted Catalog, select a vendor from the Punch-out, submit a Non-Catalog item or choose one of the University forms.
- Complete the HokieMart Form
- Navigate to the Shopping Cart

The screenshot shows the HokieMart main screen with several callout boxes:

- The Search Tool you can search for products, suppliers, forms and part numbers, etc.** (points to the search bar)
- University Forms** (points to the University Forms & SWAM Vendor Search section, listing: Direct Pay (HokieMart will not use), Interdepartmental Service Request, Reimbursement Request (HokieMart...), Travel Agency Authorization (Link...), VT SWAM Vendor Search (Overseas Vendor Search))
- Shopping cart** (points to the cart icon in the top right)
- The Featured Suppliers Shows tiles of Punch-out and Hosted catalog setup** (points to the Scientific Punchout Catalogs section, listing: Airgas, CRYAD, IDT, Thermo Scientific, USA, VWR, etc.)

## Edit the Cart

Users should now take a moment to edit (add additional information) to the shopping cart. There is a last chance to edit information during the Final Review. **Regardless of the screen form used, the information and fields required in to complete the Cart are the same.**

**Cart Name** - Users have the ability to give the cart a unique name. This is optional, but helpful when searching for past requisitions. If users purchase the same items frequently from the same supplier, it may be helpful to give the cart a unique name. Users can view past purchases by the cart name.

**Priority** - Users are able to set the priority of the PR. By default the priority will be Normal. There is a drop-down menu with the option of Urgent. Use this option ONLY when a PR is of critical importance AND it is above departmental delegation. Most PRs will be Normal.

**Date Field** - This field should be left blank. The exception is just prior to the end of the fiscal year. At that time, users may enter the date of July 1 and current year. This will ensure the invoice will be paid out of the next fiscal year's budget.

**Notify AP-Prepayment** - See Prepayment Notification in this Guide for additional instructions.

**Prepared For (On-Behalf-Of)** - This feature is used by the On-Behalf-of Requestor. The PR is prepared for another Requestor or "Shared Department." The selection may be made here or in the Final Review. For information addition information on this topic refer to the On-Behalf-Of Requestor section.

**Internal Notes** - notes intended for department and/or university. (see section below for more detail)

- Click in the box and type to add desired note.



## Send to Supplier? –Verify the delivery methods

Send to Supplier? HokieMart Will Deliver ⌵ NOTES for this supplier or and will not be sent.

**Profile Values**

HokieMart Will Deliver - HokieMart will distribute the PO to supplier

User Will Deliver - Requisitioner must deliver PO to supplier

- “HokieMart Will Deliver” (default) means the system will automatically delivery a copy of the PO to the vendor.
- “User Will Deliver” means the user will email or fax a copy of the PO to the vendor outside of the HokieMart system.

In most cases, “HokieMart will Deliver” will be the correct response.

If the delivery method should be changed;

- Click “Select from profile values.”
- From the drop down menu, choose:
  - “HokieMart Will Deliver” or “User Will Deliver.”

Once complete, select “Proceed to Checkout.”

Shopping Cart • Shopping Cart ☰ 👁 🖨 Proceed To Checkout

Simple Advanced ⋮

Search for products, suppliers, forms, part number, etc. 🔍

Cart Name:  Internal Note:  Note to all Suppliers:

Priority:  Send to Supplier?:  965 characters remaining expand | clear 1000 characters remaining expand | clear

Leave date blank unless next fiscal year order (then enter 07/01/2022)

Notify AP-Prepayment:

Prepared for:  🔍



## Removing Items from a Cart

When the user wishes to remove items from an active cart.

- Place a check mark in the box next to the item to be removed.

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 TRU RED 8.5" x 11" Copy Paper, 20 lbs., 92 Brightness, 500 Sheets/Ream, 10 Reams/Carton (TR56958)	135848	CT	37.17	Qty: 1 CT	37.17	... <input type="checkbox"/>

ITEM DETAILS

Manufacturer Name: Domtar Contract: BP0040-A Internal Note:  1000 characters remaining expand | clear

Manufacturer Part Number: 135848/TR56958

Supplier Part Auxiliary ID: 135848

more info...

- Select
- Highlight and select "Remove"

1 Item

Virginia Business Systems - 1 Item - 123.77 USD

SUPPLIER DETAILS Order Address 4: 9899 Mayland Dr, Richmond, Vi...

Contract: P3122217 PO Number: To Be Assigned

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 monthly service fee, invoice #54478841		EA	123.77	1 EA	123.77	... <input checked="" type="checkbox"/>

ITEM DETAILS

Contract: P3122217 Internal Note:  1000 characters remaining expand | clear

To remove multiple line items, select the check boxes and the arrow pointing down

Size/Packaging	Unit Price	Quantity	Ext. Price	
CT	37.17	Qty: 1 CT	37.17	... <input checked="" type="checkbox"/>

You now have the option to "Remove Selected Items" or "Remove All Items"

...	Add to Favorites
...	Remove Selected Items
...	Remove All Items
...	Move to Another Cart >
...	Add to Draft Cart or Pending PR/PO >
...	Add to PO Revision
...	Remove Contract from Selected Lines

## Moving Items to Another Cart

When user is in a **draft cart** and wishes to move an item(s) to a new cart:

- Place a check mark in the right-hand box of the line item that you wish to move.

The screenshot shows a shopping cart for "Virginia Business Systems" with 1 item totaling 123.77 USD. The item is "monthly service fee, invoice #54478841" with a unit price of 123.77 and a quantity of 1 EA. A checkmark is visible in the right-hand box of the item row. An orange arrow points to this checkmark. Below the item table, there are sections for "SUPPLIER DETAILS" and "ITEM DETAILS".

- Select

This screenshot shows the same shopping cart item, but with a context menu open over the right-hand box. The menu options are: "Remove", "Add to Favorites", "Move to Another Cart", "Add to Draft Cart or Pending PR/PO", and "Add to PO Revision". The "Move to Another Cart" option is highlighted.

- Select Move to Another Cart
- You can either move the line item to a new cart or a draft cart

This screenshot shows the context menu with two sub-menus open. The "Move to Another Cart" sub-menu has two options: "Move to new cart" and "Draft Cart". The "Add to Draft Cart or Pending PR/PO" sub-menu has one option: "2021-11-09 danielleh 01 (150967575)".

## Final Review

After selecting **“Proceed to Checkout,”** users will be ready to complete the processing the requisition.

There is a visible checklist showing information that is still required to submit the requisition.

There is information the requisitioner may want to edit in the General and Shipping sections. The Billing section will always remain as the defaulted information.

General	Shipping	Billing
<b>Cart Name</b> 2021-11-09 danielleh 01 <b>Priority</b> Normal Leave date blank unless next fiscal year order (then enter 07/01/2022) <i>no value</i> <b>Prepared by</b> Danielle Harlow <b>Prepared for</b> Danielle Harlow <b>Work Order Number</b> N/A	<b>Ship To</b> Contact Name Danielle Harlow Phone +1 540-231-8548 Email danielleh@vt.edu Procurement North End Center Ste 2100 300 Turner St NW Blacksburg, VA 24061 United States  <b>Delivery Options</b> Ship Via Best Carrier-Special, See Comments ⚠ Ship Via for this supplier is unsupported and will not be sent.  Send to Supplier? HokieMart Will Deliver HokieMart will distribute the PO to supplier  Notify AP-Prepayment ✗	<b>Bill To</b> Accounts Payable Email to: vtinvoices@vt.edu Or Mail To: North End Center Suite 3300 300 Turner Street NW Mail Code 0312 Blacksburg, VA 24061 United States



## General

General displays data entered during the Edit the Cart section. At this time, On-behalf-of users should select a different user, if they haven't already done so. In the upper portion of

the general section, select  .

**Edit General** ✕


---

**General**

---


Cart Name \*


Priority  ▼

Leave date blank unless  
next fiscal year order  
(then enter 07/01/2022) 

mm/dd/yyyy

Prepared by

Prepared for  

Work Order Number \*  

---

★ Required fields

To prepare the requisition "On Behalf" of a different user, enter name of the user you wish to purchase on behalf of and click Search.

- Possible choices will be displayed. Find the particular user from the list and choose Select.
- When complete, click "Save."

## Shipping

Shipping displays information regarding shipping and delivery data.

### Edit Shipping ✕

**Ship To** ★

**CURRENT ADDRESS** ↻

Contact Name <span>★</span>	<input type="text" value="Erin Griffin"/>	<input type="checkbox"/> Add to my addresses
Phone	<input type="text" value="+1 540-231-90"/>	
Email <span>★</span>	<input type="text" value="erinc93@vt.edi"/>	
Address Line 1	Procurement	
Address Line 2	North End Center S te 2100	
Address Line 3	300 Turner St NW	
City	Blacksburg	
State	VA	
Zip Code	24061	
Country	United States	

---

**0333** - Erin Griffin, +1 540-231-9028, erinc93@vt.edu, Procurement, North End Center Ste 2100, 300 Turner St NW, Blacksburg, VA 2406... ★

**Surplus** - Ron Barrett, (540) 231-5660, ronald@vt.edu, Surplus Property, 1425 South Main St, Blacksburg, VA 24061, United States

---

🔍 Results Per Page  ▼

Users can edit the ship to address that they want their order to ship to here. All default addresses saved in the users profile will appear first, or users can search for an additional existing address in HokieMart.



The Ship Via should default to “Best Carrier-Special, See Comments.”

The user will have the chance to edit the delivery method to the supplier (either HokieMart Will Deliver or User Will Deliver).

The user can check the Notify AP-Prepayment box if a prepayment is required on this order.

**Delivery Options**

---

Ship Via

Send to Supplier? ★

Notify AP-Prepayment

---

★ Required fields

## Internal/External Notes and Attachments

Internal/External notes and attachments are used to communicate or notate information about an order internally or to communicate externally to the supplier. **Internal/External notes and attachments cannot be used on a Punchout Requisition.**

Internal notes and attachments remain internal to Hokiemark and are not viewable by the Supplier. Example uses are:

- To reference an item for a specific cart (“for Chemistry 101 lab class”, “Supplies for Dr. Bell”)
- For notes needed by the Procurement Department (“See attached bid”, “Confirming invoice”)
- Used to provide information to add a New Supplier

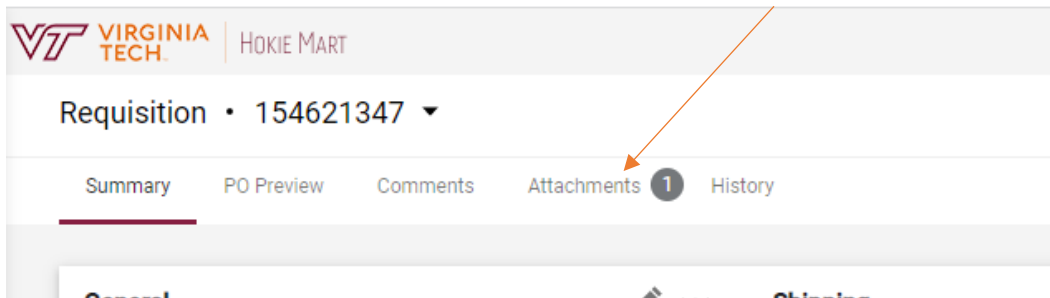
External notes and attachments are those intended for the Supplier to see. Example uses are:

- To communicate delivery instructions to the supplier (“deliver to loading dock”)
- To attach a quote you are referencing in your product description

Example of Internal and External notes and attachments on a requisition:

Internal Notes and Attachments		External Notes and Attachments		
Internal Note	Supplies needed for the Vendor Fair	Note to all Suppliers	Please reference the attached quote # 12-5930 provided by sales rep.	
Internal Attachments	Add	Attachments for all suppliers		
			Date	Add
		Quote 12-5930.docx	2/28/2022	...

Any attachments added through the Internal/External Notes and Attachments sections will also appear on the Attachments tab of the requisition and PO.



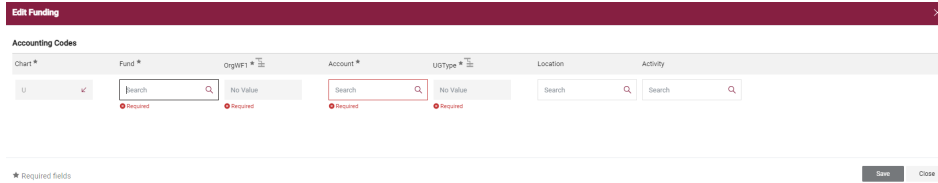
If you forget to add your attachment while processing your requisition, you can still add it through a comment after the requisition has been submitted or completed.

## Funding Information

In this section, the fund and account are required. To edit or provide missing information,

select '  ' The **Accounting Codes** box will open allowing:

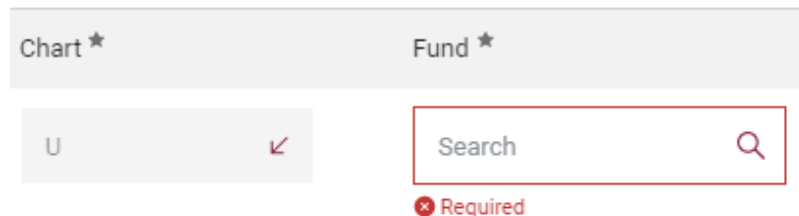
- for changes to be made or
- information to be added.



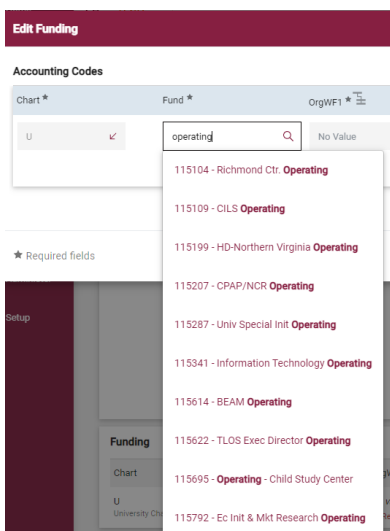
### Fund

The fund code may be displayed if one has been created as a default in the user profile. Some users have access to multiple funds. If the appropriate fund does not display or another fund should be used, users may use the search feature or type the fund code in.

#### Accounting Codes



A listing of available funds will be displayed from a drop-down list.



Highlight the appropriate fund code and click to select it.

Then "Save"

The screenshot shows a web form titled "Edit Funding". Below the title bar, there is a section labeled "Accounting Codes". This section contains several input fields: "Chart \*" with the value "U", "Fund \*" with the value "115109", "Org/WF1 \*" with the value "027205", "Account \*" with the value "13120", and "UGType \*" with the value "NA". There are also search boxes for "Location" and "Activity". A red box highlights the "Account \*" field, and a red arrow points to it from the right. A red "Required" indicator is visible below the "Account \*" field. At the bottom right of the form, there are "Save" and "Close" buttons.

## Account Code

Account codes are used by the Controller's office to classify and categorize expenditures. It is important that correct account codes are used when entering purchases in HokieMart. For a quick reference of account codes see: [Account Code Listing](#)

- If the Value (account code) is known, it may be entered.

Frequently used account codes can be stored in the user's profile. To learn how to add Account Code Favorites, see **User Information and Settings: Account Code Favorites**.

If the appropriate account code is in their profile, users may "Select from profile values." If account codes are stored in the user's profile, they will be displayed in a drop-down list by choosing "Select from profile value." The appropriate selection may be made from this list.



## Searching for Account Codes

If the account is not available from the user profile, users may need to search for the appropriate account code. To search for account code type in the search field.

Account \* UGType \*

Search NA

Required

**Accounting Codes**

Chart *	Fund *	OrgWF1 *	Account *	UGType *
U	121715	047000	office supplies	NA

13120 - Office Supplies - Gen.  
1312U - Office Supplies - Unallowable

Highlight the appropriate account code and click to select it.

Then "Save"

**Edit Funding**

**Accounting Codes**

Chart *	Fund *	OrgWF1 *	Account *	UGType *	Location	Activity
U	121715	047000	13120	NA	Search	Search

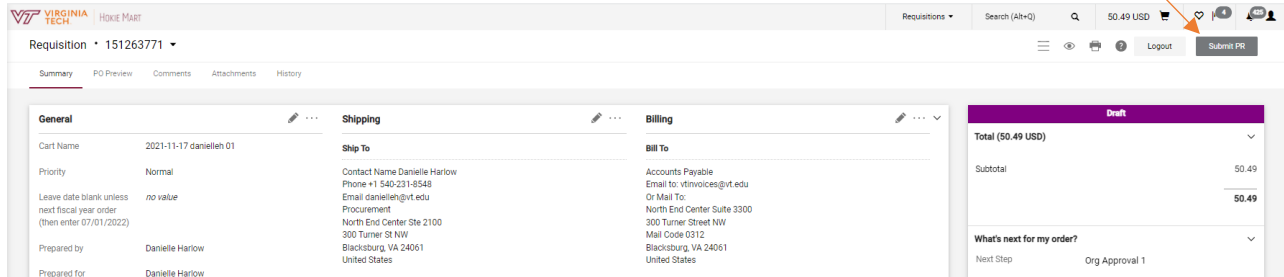
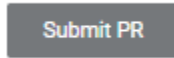
Required

\* Required fields **Save** **Close**

## Submit the PR

After completing the "Final Review" the user is ready to submit the PR for processing.

- Click "Submit PR."

A screenshot of the Virginia Tech Hokie Mart Requisition page for requisition number 151263771. The page is divided into several sections: General, Shipping, Billing, and a Draft summary. The General section shows the cart name, priority, and preparation details. The Shipping section provides contact information for Danielle Harlow. The Billing section lists the bill-to address and contact information. The Draft summary shows a total of 50.49 USD and the next step as Org Approval 1. A red arrow points to the "Submit PR" button in the top right corner of the page.

General	Shipping	Billing
<b>Cart Name</b> 2021-11-17 danielleh 01	<b>Ship To</b>	<b>Bill To</b>
<b>Priority</b> Normal	Contact Name Danielle Harlow Phone +1 540-231-8548 Email danielleh@vt.edu	Accounts Payable Email to: vtinvoices@vt.edu Or Mail To:
Leave date blank unless next fiscal year order (then enter 07/01/2022)	Procurement North End Center Ste 2100 300 Turner St NW Blacksburg, VA 24061 United States	North End Center Suite 3300 300 Turner Street NW Mail Code 0312 Blacksburg, VA 24061 United States
<b>Prepared by</b> Danielle Harlow		
<b>Prepared for</b> Danielle Harlow		



Draft	
<b>Total (50.49 USD)</b>	
Subtotal	50.49
	<b>50.49</b>
<b>What's next for my order?</b>	
Next Step	Org Approval 1

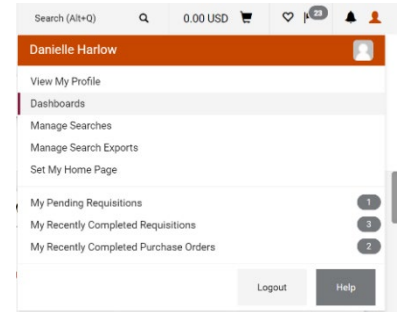
- The PR is now complete
- A Requisition number will display




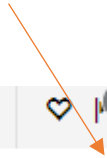
## Withdraw the PR

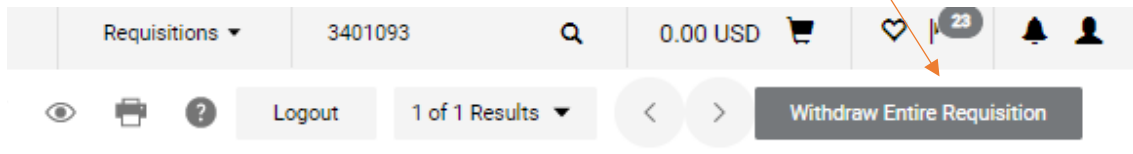
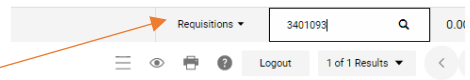
A Requestor can withdraw a PR at any stage **prior to it becoming a PO**.

- Click on  and select "My Pending Requisitions" 




OR

- Perform a query by searching the PR number 
- Select and open the desire PR
- In the upper right-hand corner of the Requisition select "Withdraw Entire Requisition" 



### Withdraw Entire Requisition

 Once a requisition is withdrawn, it cannot be reinstated. Click OK to withdraw, or CANCEL to leave the requisition unchanged.

Reason

1000 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.

- Include a comment for a reason for the withdrawal
- Select "OK"
- Status will be updated as "withdrawn"

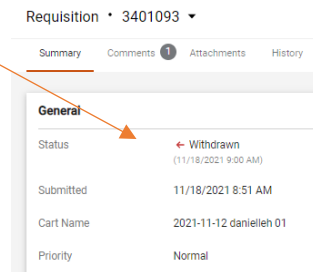
Requisition • 3401093 ▾

Summary Comments **1** Attachments History

---

**General**

Status	← Withdrawn (11/18/2021 9:00 AM)
Submitted	11/18/2021 8:51 AM
Cart Name	2021-11-12 danielieh 01
Priority	Normal

A screenshot of a requisition management interface. At the top, it shows 'Requisition • 3401093' with a dropdown arrow. Below this are tabs for 'Summary', 'Comments' (with a '1' notification), 'Attachments', and 'History'. The 'Summary' tab is active. Underneath, there's a section titled 'General' containing a table with requisition details. An orange arrow points from the third bullet point in the list above to the 'Status' field in the table, which now displays '← Withdrawn' with a timestamp of '(11/18/2021 9:00 AM)'. Other details include 'Submitted' (11/18/2021 8:51 AM), 'Cart Name' (2021-11-12 danielieh 01), and 'Priority' (Normal).

## Return PR to Requisitioner

An Approver has the ability to return the Purchase Requisition (PR) to the Requestor (requisitioner) for any changes/updates that need to be made. This will allow the Approver to return rather than reject the PR.

After the Approver has assigned and viewed the PR and returned, the Requestor will receive an automatic email with the URL link. When a requisition is returned by the Approver it reverts to a Draft Requisition.

Requestor should:

- Click on "cart."
- Click on "draft carts."
- Make the requested changes/updates and resubmit the PR into the workflow.

The PR number will remain the same as the original. All previous documentation and notes will be preserved. The requisition will restart the workflow from the beginning regardless of the step it was returned from.

A HokieMart system Notification or Email will be received by the Requestor notifying them of the return. The requestor must have "Cart/PR rejected/returned" checked in their Profile in order to receive the emails.

### **Automatic Return of Requisitions Rejected by Banner**

A Banner budget authorization may fail due to an "invalid user," "invalid accounts," or "insufficient funds." A feature will now return the rejected budget authorization PRs to the Requestor in the form of a draft cart. Users can now correct and resubmit the PR without having to create a new PR.

The user will receive an automatic email notification that the PR has been returned and that action is needed. The reason that the PR is being returned is included in the email.

**Note:** *The user must have "Cart/rejected/returned" checked in their email preferences to receive this automatic email. (See User Profile for more information related to this topic).*

## Requisition and Purchase Order Follow Up

### PR Approval Workflow

The purchase requisition is submitted into the HokieMart workflow and will proceed through several steps, including through each level of approval. After the PR has completed all approval levels, it will become a purchase order (PO).

The workflow can be viewed on the right-hand side of the requisition.

The screenshot shows a requisition summary and a workflow diagram. The summary includes a total of 350.00 USD and a list of approvers. The workflow diagram shows a sequence of steps: Draft (Active), Budget Auth (Future), Org Approval 1 (Future), Budget Auth 2 (Future), Create PO (Future), and Finish (Future).

Draft	
Total (350.00 USD)	▼
Subtotal	350.00
	<hr/>
	<b>350.00</b>

What's next for my order?	
Next Step	Org Approval 1
Approvers	Griffin, Erin Harlow, Danielle Sutphin, Bonnie

Workflow 🔗 🖨️

Show skipped steps

- Draft**  
Active  
Erin Griffin
- Budget Auth**  
Future
- Org Approval 1**  
Future
- Budget Auth 2**  
Future
- Create PO**  
Future
- Finish**  
Future

The first section provides an overview of the total cost on your requisition and shows the status (draft, pending approval, etc.).

The workflow shows each step that your order will proceed through.

A typical requisition workflow may look similar to this, or it may have additional approval steps in the process.

**Draft** – the requisition has not yet been submitted.

**Budget Auth** – the departmental budget is checked to verify that funds are available.

**Org Approval 1** – the first level approver can approve or reject all or part of a requisition.

*To view the approvers, click this step.*

**Budget Auth 2** – the departmental budget is checked a second time.

**Create PO** – the requisition becomes a PO.



## Canceling a PO

If your requisition has not yet been approved and progressed to a PO, you can withdraw it, or ask one of your approvers to reject or return the requisition to you.

If your requisition has been approved and is now a PO, you will need to do a couple of things to cancel it:

1. Contact the vendor and confirm with them that you are cancelling the PO.
2. Complete a cancelled receipt on the PO. For more information on how to complete receiving and step by step instructions for different receiving scenarios, please review the [Receiver Guide](#).

## Methods of Delivery

There are three methods of delivery:

1. Computer to Computer (CXML)

original	2/17/2022 8:56:27 AM	System	PO Sent via CXML	200: OK
----------	-------------------------	--------	---------------------	---------

2. Fax

original	12/20/2021 3:28:31 PM	System	Delivery Notification	Delivered to: +1 540-639-6683 Date and time of delivery: Dec 20, 2021 3:28:31 PM Number of pages delivered: 2 Delivery was made on attempt #: 1 <a href="#">Show less</a>
original	12/20/2021 3:23:30 PM	System	PO Sent via fax	Out for fax delivery to +1 540-639- 6683

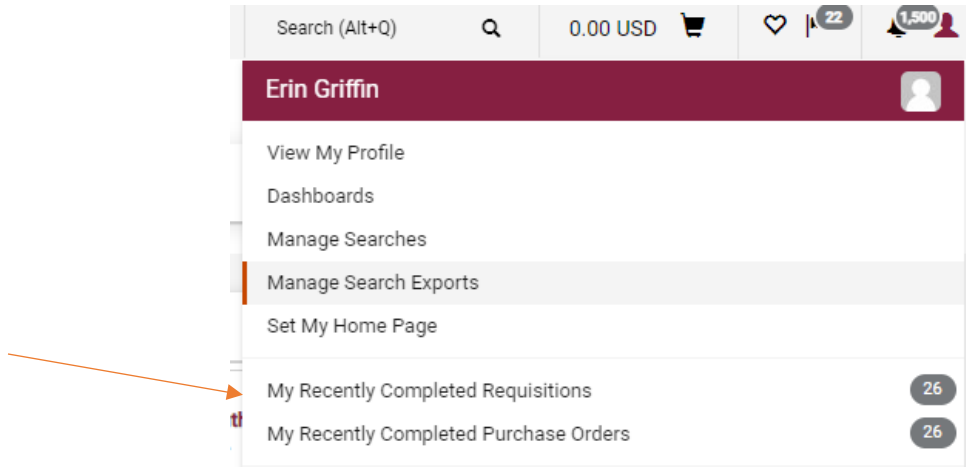
3. Email

original	12/20/2021 3:23:30 PM	System	PO Sent via PDF attached email	becca@elevenwest.com
----------	--------------------------	--------	---	----------------------

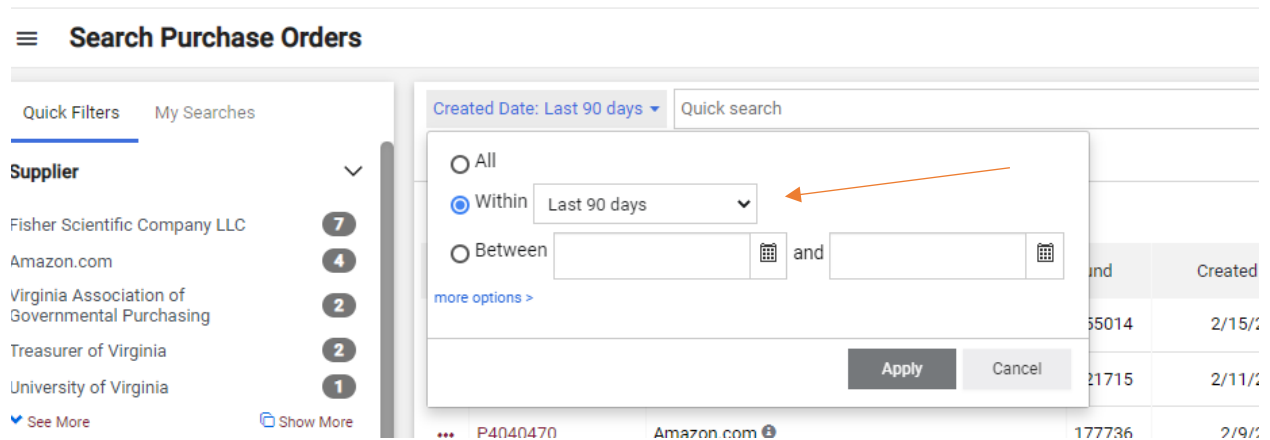
Please note that the method for delivery is determined by the vendor at the time of their setup.

## Viewing PRs and POs

PRs and POs can be viewed for 90 days after completion using the drop down menu located under the user profile



Or you can filter by date to view PRs and POs completed within certain time frames.







Additional filters can be viewed and selected when searching for PRs and POs.

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

PO Owner: Griffin, Erin | PO Status: Completed

1-26 of 26 Results

PO Number	Supplier	Fund	Created Date/Time	PO Status
P4043600	UPS	655014	2/15/2022 9:07:21 PM	Completed
P4041860	NIGP	121715	2/11/2022 1:49:07 PM	Completed
P4040470	Amazon.com	177736	2/9/2022 3:21:04 PM	Completed
P4039382	University of Virginia	121715	2/8/2022 11:54:53 AM	Completed
P4039078	Livingston International Inc	121715	2/8/2022 8:22:31 AM	Completed
P4034576	Treasurer of Virginia	116976	1/31/2022 9:12:29 PM	Completed

To print a copy of your PR or PO, click the printer icon at the top right hand side of the screen. This will open the document in a new tab on your browser that you can print or save as a PDF.

Purchase Order • P4043600 Revision 0

Status Summary Revisions 1 Confirmations Shipments Receipts 1 Invoices Comments Attachments 2 History

**General Information**

PO/Reference No.  
P4043600

Requisition Number  
154170072 view | print

**Shipping Information**

Ship To

Contact Name Erin Griffin  
Phone +1 540-231-9028  
Email erinc93@vt.edu  
Procurement  
North End Center Ste 2100

**Billing/Payment**

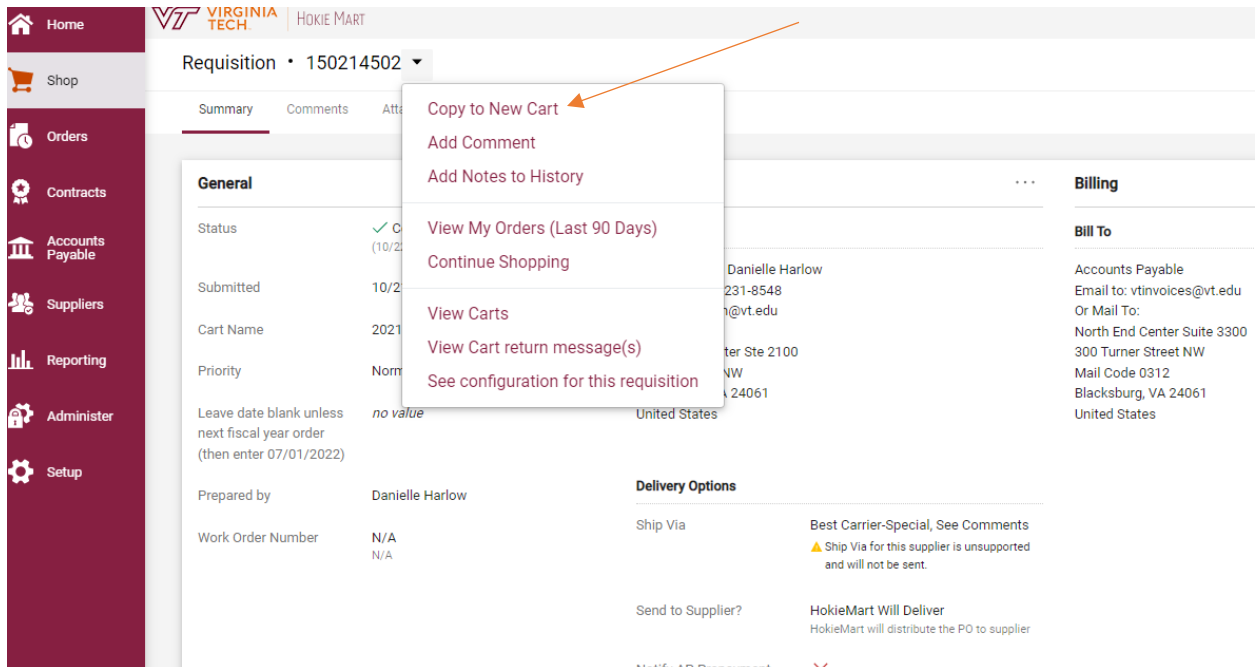
Bill To

Accounts Payable  
Email to: vtinvoices@vt.edu  
Or Mail To:  
North End Center Suite 3300  
300 Turner Street NW

## Copying a Cart

Users can copy requisitions into a completely new cart, providing a very convenient way to repeat an order. Items can be removed or additional products can be added to the cart if needed.

- Locate an existing requisition
- Open the requisition
- From the Actions drop-down menu select Copy to New Cart



A new shopping cart is created with all line item(s) and requisition custom information included.

Copying a cart should be done with caution! Copying a cart copies all information. If you copy a requisition that was rejected for an error, that error will get copied.

**Requisitions that were above departmental delegation should never be copied.**

## Additional Actions

### Adding a New Supplier/Address

Sometimes the need arises to purchase from or use a vendor/supplier that is not currently listed in the HokieMart or Banner database. The Procurement Department must enter the vendor into the system, so the order can be processed through HokieMart and ultimately that the vendor can be paid through Banner.

Note that a new vendor/supplier can be an individual or a corporate entity.

**This procedure can also be used to communicate changes or updates to existing supplier information, such as addresses, phone or fax numbers.**

The requestor must select the appropriate form to process the order. The available form options for this type of situation would be either Non-Catalog Item or Reimbursement Request.

From the Main Screen of HokieMart, for this example we will select Non-Catalog Item:

- Choose and click desired form.
- After a search for the supplier has been attempted type the words “New Supplier” in the Supplier box. This will bring up the “New Supplier/Address” option.

**Add Non-Catalog Item**

New Supplier/Address

New Supplier  X 🔍

**Item**

Description ★	Catalog No.	Quantity ★	Price
<input type="text"/> 254 characters remaining	<input type="text"/>	<input type="text"/>	<input type="text"/>

The selection of the Fulfillment Address will default to VT Purchasing (Procurement) Department.

The screenshot shows a form with the following sections:

- Existing Supplier**: A tab at the top left.
- New Supplier/Address**: Two search input fields with 'X' and 'Q' icons.
- Fulfillment Address**: A dropdown menu with a downward arrow and the text 'Distributi'.
- Order Address 1**: A selected address entry: 'Order Address 1 - VT Purchasing Dept, Blacksburg, Virginia 24061 United States'. An orange arrow points to this entry.
- Item**: A table with columns: Description, Catalog No., Quantity, Price, and Packaging.

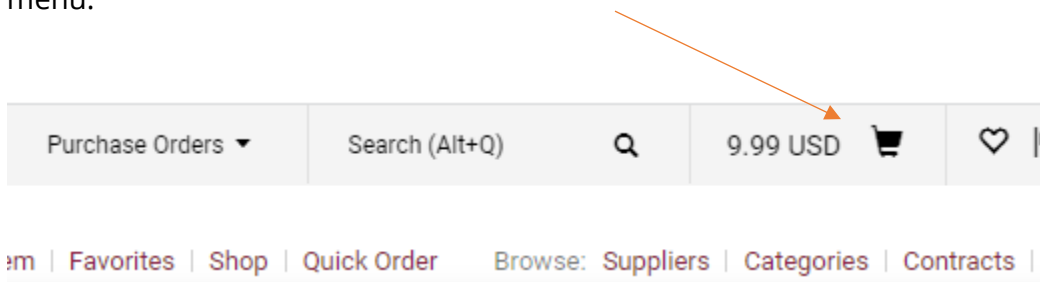
Description *	Catalog No.	Quantity *	Price	Packaging
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	EA - Each

254 characters remaining

Continue to complete the information for the item as usual:

- Provide description
- Catalog No. if necessary
- Quantity
- Price
- Packaging
- Click "Save and Close"

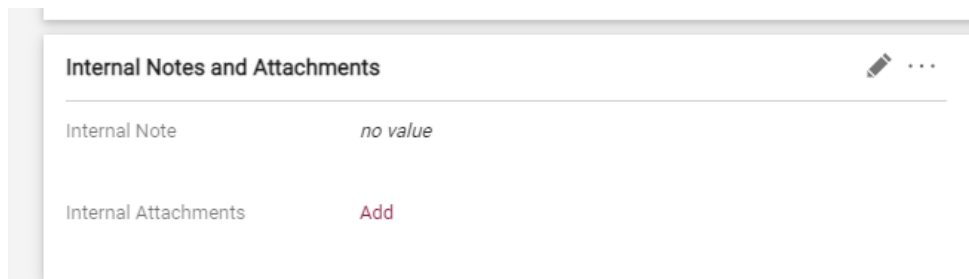
Locate the Cart icon on the upper right-hand corner of the page to activate the dropdown menu.



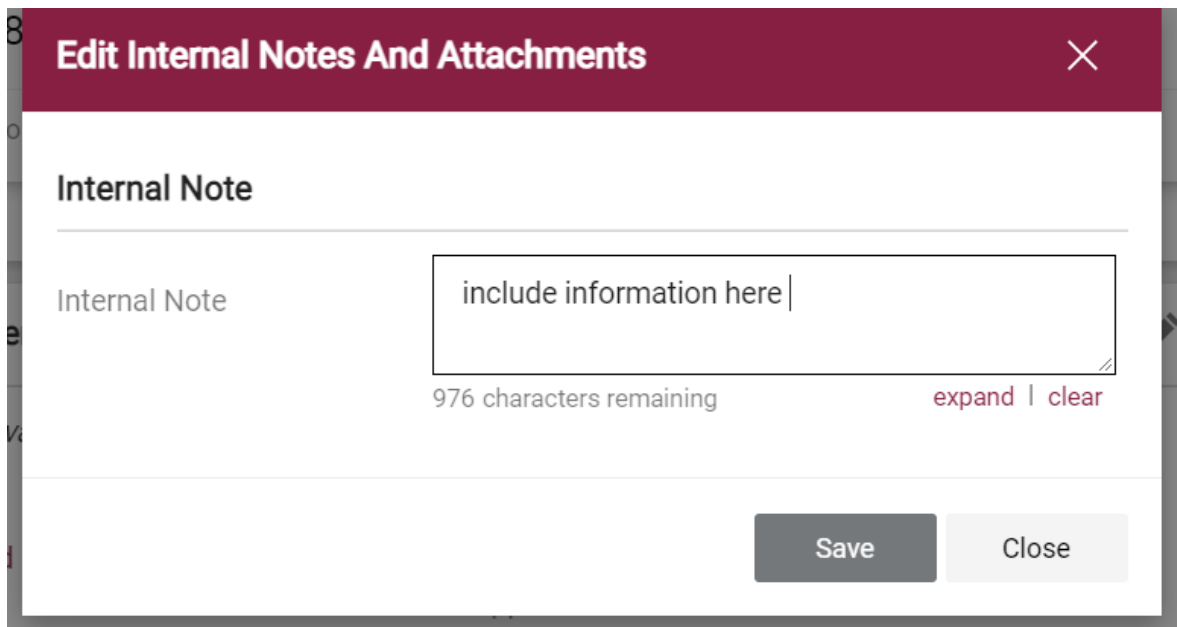
Click **View My Cart** to navigate to the Cart – Draft Requisition where the Cart can be reviewed and edited or click **Checkout** to proceed to input your Requisition information.



- Scroll down to **Internal Notes and Attachments** section on the left-hand side of the cart.
- Select the  icon to edit.



- An Internal Note box will open.
- Type the information needed to set up a new supplier in the Internal Note box (see below)



In order to avoid delays processing the PR, the Procurement Department requests that the following information is provided to set up the New Supplier:

### **For Vendors**

Put the following in the internal notes:

- Vendor name
- Address
- Phone and fax number - **many HokieMart orders are faxed to suppliers**
- And if available, the FIN or banner id (each separated by a semi colon)
- If using a supplier website, provide the website address

Click Save and complete the PR.

### **For an Individual or Student**

If the vendor/supplier is a VT faculty, staff or student please put the following in the internal notes:

- First and last name (middle initial when available)
- Address
- Banner ID Number with the first 3 digits masked (XXX-456-789)
  - If the individual is a student only the last 4 of the banner id should be provided

**Due to PII policies, NEVER include social security numbers in the Internal Notes.**

Click Save and complete the PR.

### **New Supplier /Vendor Follow Up**

The Vendor Team will add the new supplier if needed.

If the address already exists, the Vendor Team will select the supplier and may add a comment advising the user. The supplier will now be available for future use.

If the PR does not include the above supplier information, the PR will be rejected advising the department of the required information. The requestor will then need to copy the cart to a new cart and add all of the required information.

After the Procurement Department adds the new supplier, the PR will proceed through the approval workflow.

## Best Vendor

When a department knows the item(s) that need to be ordered but are unsure of a supplier, a buyer in the Procurement Department can process the purchase order (PO). In order for the purchase requisition (PR) to be electronically delivered to Procurement, choose **Best Vendor** as the supplier. When using Best Vendor be sure to provide a detailed description of what you are purchasing and list an appropriate contact in your department for the Buyer to discuss your needs.

From the Main Screen of HokieMart:

- Open a Non-Catalog form
- Type "Best Vendor" in the Supplier Name field

The selection of the Fulfillment Address will default to VT Purchasing (Procurement) Department.

**Add Non-Catalog Item** [X]

Existing Supplier

Best Vendor [X] [Q] Best Vendor [X]

Fulfillment Address [v] Distribution Methods [>]

Order Address 1 [i] - VT Purchasing Dept, Blacksburg, Virginia 24061 United States

Item [v]

Description *	Catalog No.	Quantity *	Price	Packaging
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	EA - Each [v]

254 characters remaining

\* Required fields

Save Save And Add Another Close

- Complete the PR.


## Split Funding

There are two primary methods of splitting the funding between funds:

- the entire purchase (header level)
- by line item

### Split Funding at the Header Level

When user wishes to split the funding on a PR at the header level (split the entire amount of the PR),

- Click the pencil icon  in the right-hand corner in the Funding section to edit.

An **Accounting Codes** box will open.

- Click the + symbol to add a line of funding

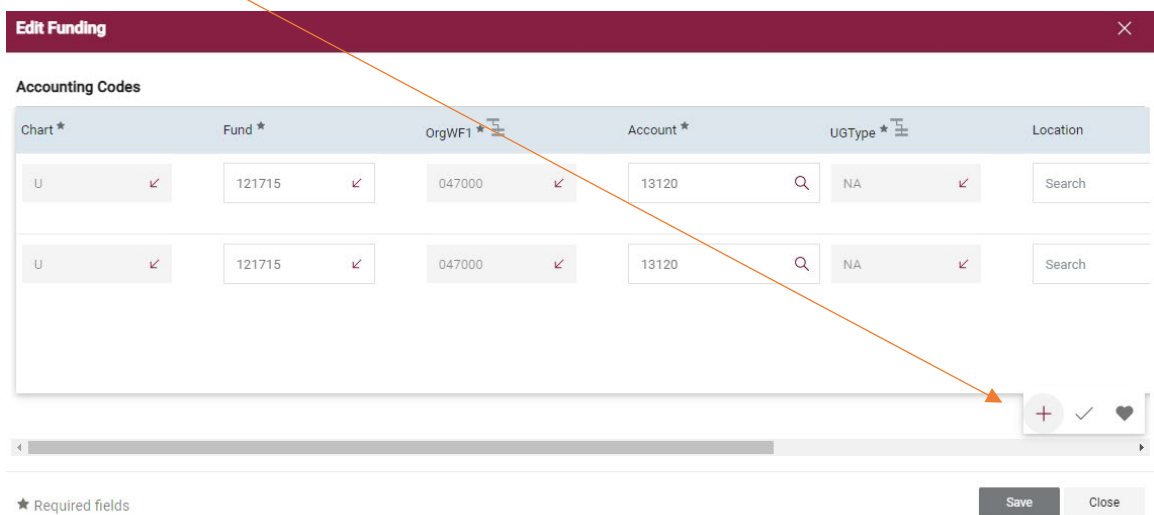
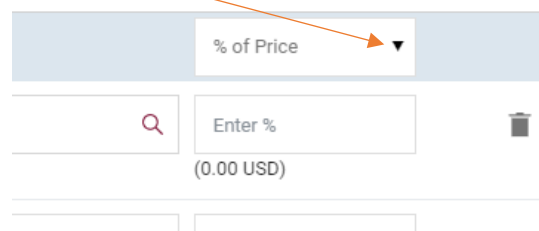


Chart *	Fund *	OrgWF1 *	Account *	UGType *	Location
U	121715	047000	13120	NA	Search
U	121715	047000	13120	NA	Search

★ Required fields

Save Close

Selecting the down arrow with allow you to enter split amounts by % of Price, % of Quantity, or Amount of Price



% of Price

Enter %

(0.00 USD)



**It is highly recommended that users select the Amount of Price option.** The % of Price or % of Quantity options will likely result in failed orders due to the way that Banner and HokieMart do their rounding differently.

### Split Funding at the Line Item Level

- Go to line item and select ...

**Guy Brown Products - 1 Item - 3.77 USD**

^ SUPPLIER DETAILS Order Address 3 : 7111 Commerce Way, Brentwood,...

Contract BP0040-A PO Number To Be Assigned

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 Avery Glue Stic Permanent Glue Sticks, 1.27 Oz., 6/Pack (98073)	390848	PK	3.77	Qty: 1 PK	3.77	...

^ ITEM DETAILS

Manufacturer Name Avery Products Corporation Contract: BP0040-A Internal Note no value

Manufacturer Part Number 98073 Internal Attachments Add

Supplier Part Auxiliary ID 390848

- Select **Accounting Codes**

Special Payment Terms? If yes, please check the box.

Special Freight Terms? If yes, please check the box.

PO Clauses Add

**1 Item**

**Guy Brown Products - 1 Item - 3.77 USD**

^ SUPPLIER DETAILS Order Address 3 : 7111 Commerce Way, Brentwood,...

Contract BP0040-A PO Number To Be Assigned

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 Avery Glue Stic Permanent Glue Sticks, 1.27 Oz., 6/Pack (98073)	390848	PK	3.77	Qty: 1 PK	3.77	...

^ ITEM DETAILS

Manufacturer Name Avery Products Corporation Contract: BP0040-A Internal Note no value

Manufacturer Part Number 98073 Internal Attachments Add

Override

- Ship To
- Delivery Options
- Bill To
- Credit Card Info
- Accounting Codes
- Buyer Checklist
- Remove
- Add to Favorites
- Move to Another Cart
- Add to Draft Cart or Pending PR/PO
- Add to PO Revision

Org Approval 1 Future

Budget Auth\_2 Future

- To add another funding line, select the + symbol

**Override Line 1: Accounting Codes**

Chart *	Fund *	OrgWF1 *	Account *	UGType *	Location	Activity
U	21715	047000	13120	NA	Search	Search

+ ✓

★ Required fields

Save Close

- Select the down to enter split amounts by Amount of Price

- Once additional funding lines are added, select **Save**

The Funding section of the requisition will now display “Values vary by line” to indicate that funding has been detailed to the line item level.

**Funding**

Values vary by line.

Chart	Fund	OrgWF1	Account	UGType	Location	Activity
U University Chart	121715 Procurement Operation	047000 Procurement	13120 Office Supplies - Gen.	NA Not Applicable	no value	no value

**Funding indicated on the line item level will override the fund chosen for the entire requisition.**

*\*\*\*Please note: when copying a cart, any funding detailed to the line item level will copy to the new cart line items.*


## Shared Department (or On Behalf Of)

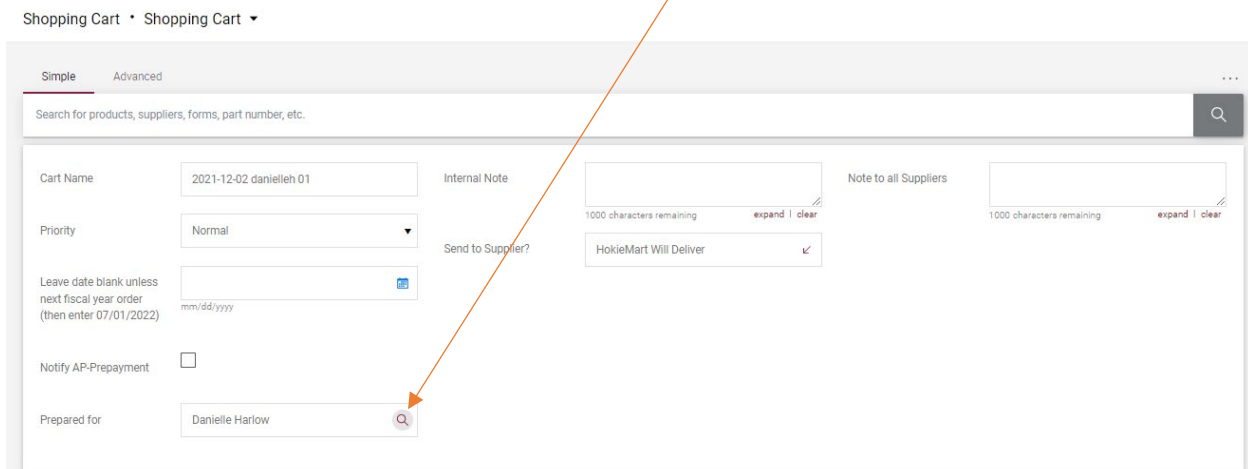
The purpose of a Shared Department PR is when a department is sharing the cost of purchasing particular goods or services with one or more departments.

*\*Note the steps to create a PR for a shared department are similar to the steps required to create a PR for an On Behalf Of requestor.*

There are two areas where users can create a Shared Department PR

### Option #1

When processing the shopping chart, select the  icon next to "Prepared for"



Shopping Cart • Shopping Cart ▾

Simple Advanced

Search for products, suppliers, forms, part number, etc. 🔍

Cart Name: 2021-12-02 danielleh 01 Internal Note: 1000 characters remaining expand | clear

Priority: Normal Send to Supplier? HokieMart Will Deliver ✓ Note to all Suppliers: 1000 characters remaining expand | clear

Leave date blank unless next fiscal year order (then enter 07/01/2022) mmm/dd/yyyy

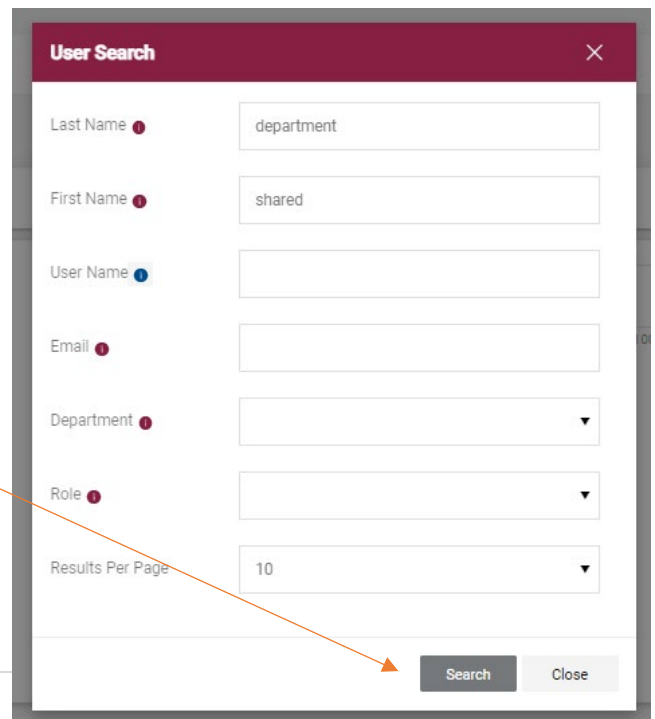
Notify AP-Prepayment

Prepared for: Danielle Harlow 🔍

Search for the user "Shared Department"

- Last Name: **Department**
- First Name: **Shared**

Then click **Search**



User Search ✕

Last Name 🔴 department

First Name 🔴 shared

User Name 🔵

Email 🔴

Department 🔴

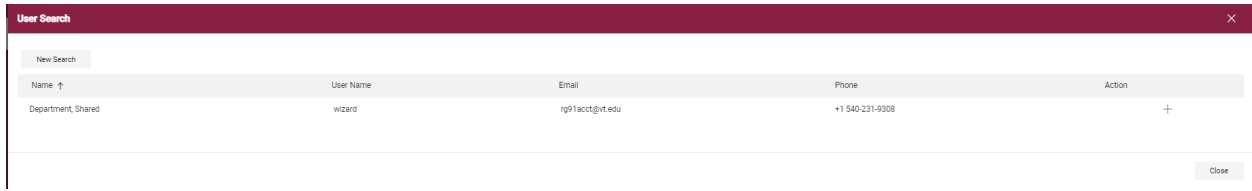
Role 🔴

Results Per Page 10

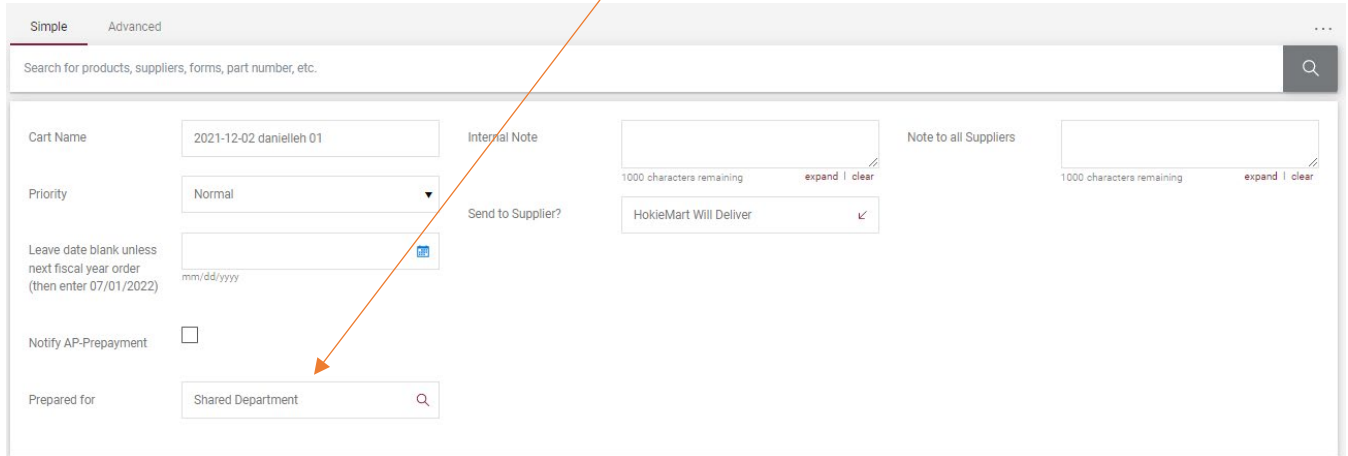
Search Close

If you are an On Behalf of Requestor entering the order on behalf of another user in your department, you would search for that user here.

Select the "+" symbol to add the Shared Department user to your Shopping Cart



The Shopping Cart has been updated to reflect "Shared Department" or another user



## Option #2

If the user forgot to create a Shared Department request while creating the Shopping Cart, the requestor has a second opportunity to input this information.

Before submitting the PR, users can edit the General section by selecting the  symbol

**General**

Cart Name: 2021-12-02 danielleh 01

Priority: Normal

Leave date blank unless next fiscal year order (then enter 07/01/2022): no value

Prepared by: Danielle Harlow

Prepared for: Danielle Harlow

Work Order Number: N/A

Follow steps above in Option#1 to search, select, and update the "Prepared for" field to "Shared Department" or other desired user.

## Adding a Comment

### Adding Comments to PR or PO

Requestors and Approvers have the ability to add comments to the PR or PO. In addition, a comment may be sent to other HokieMart users. If designated, notification of a comment will be transmitted via email to the designated recipients. Examples of situations where a comment might be useful are:

- To notify an Approver or other HokieMart user that a PR is ready for approval
- To add an attachment
- To add a comment to a PR/PO after the PR/PO has been processed

To add a comment:

Select the **Comments tab**

Purchase Order • P3988571 Revision 0 ▾

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

General Information		Document Status	
PO/Reference No.	P3988571	A/P status	Open
Revision No.	0	Workflow	✓ Completed (11/4/2021 3:28 PM)

The drop down menu will allow user display comments from:

- **All**
- **Requisition**
- **Purchase Order**
- **Invoice**
- **Receipt**

Records found: 0 Show comments for Purchase Order ▾ +

*No comments have been added*

To add a new comment, select the “+” symbol

Type desired comment

Add recipient for the comment or select one of the recipients already listed

Include attachment to the comment (optional)

Records found: 0

Show comments for All

**ADD COMMENT**

Please see attachment. - DH

973 characters remaining expand | clear

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)

Danielle Harlow (Prepared by, Prepared for) <danielleh@vt.edu>

**Attach file (optional)**

Attachment Type  File  Link/URL

File Name

File

Choose File Upload your file

No comments have been added

When satisfied with comment select  symbol.

Records found: 1

Show comments for All

**Danielle Harlow** - 12/6/2021 3:44:49 PM

Purchase Order - P3988571 Comment Added

Please see attachment. - DH

Email sent: Danielle Harlow <danielleh@vt.edu>

The comment has now become a permanent part of the Purchase Order.

## SCHEV Orders

It is critical that when entering multiple SCHEV numbers that they be entered exactly as shown below (with no spaces inserted in the SCHEV number). This information is to be added in External Notes section of the HokieMart form.

1. Order for one fixed asset (i.e. one SCHEV number):

ETF=2080640151

2. Order containing multiple fixed assets in a given range (i.e. the range below would account for 4015,4016,4017,4018,4019,4020,4021):

ETF=2080640151,2080640171,2080640211

3. Order containing multiple fixed assets not in a consistent range:

ETF=2080640151,2080640171,2080640211

SCHEV orders to the same vendor should be consolidated to one PO if possible, rather than placing a separate PO for each item ordered on SCHEV funding to the same vendor.



## Prepayment Notification

Prepayment Notification is a feature that alerts the accounts payable department that a check must be cut and sent on to a vendor/ supplier, prior to receipt of goods and/or services.

Although it is not the policy of the university to prepay for goods and/or service, there are times a vendor/ supplier must be paid in advance, such as magazine subscription, conference registration or a partial deposit payment. Another common prepayment is for events where the check is to be presented by the department directly to the vendor on the day of an event, for example, an honorarium or speaker fee.

To indicate that your order requires prepayment, select “Notify AP-Prepayment” on your requisition to route your PO to Accounts Payable.



Shopping Cart • Shopping Cart ▾

Simple    Advanced

---

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

---

Cart Name	2022-02-23 erinc93 01
Priority	Normal ▾
Leave date blank unless next fiscal year order (then enter 07/01/2022)	<input type="text"/>  mm/dd/yyyy
Notify AP-Prepayment	<input checked="" type="checkbox"/>
Prepared for	Erin Griffin 



From your shopping cart, select the check box next to “Notify AP-Prepayment” to mark your requisition as an order that needs to be prepaid.

If you forget to check this box while in the Shopping Cart, you can still edit this field when processing your Requisition. It will be located under the Shipping block.

Requisition • 154621347 ▾

Summary PO Preview Comments Attachments History

---

<b>General</b>  ...	<b>Shipping</b>  ...
Cart Name 2022-02-23 erinc93 01	<b>Ship To</b>
Priority Normal	Contact Name Erin Griffin
Leave date blank unless next fiscal year order (then enter 07/01/2022) <i>no value</i>	Phone +1 540-231-9028
Prepared by Erin Griffin	Email erinc93@vt.edu
Prepared for Erin Griffin	Procurement
Work Order Number N/A N/A	North End Center Ste 2100
	300 Turner St NW
	Blacksburg, VA 24061
	United States
	<b>Delivery Options</b>
	Ship Via Best Carrier-Special, See Comments
	Send to Supplier? User Will Deliver Requisitioner must deliver PO to supplier
	Notify AP-Prepayment <input checked="" type="checkbox"/>

Supporting documentation will need to be attached to the requisition electronically as an Internal Attachment.

### Guidelines for Prepayments

- Cannot be made more than 90 days prior to the date of an event or start of service unless there is a monetary advantage to the University. If greater than 90 days, special permission must be granted by Accounts Payable.
- Maximum allowed for prepayment for goods and services contracts/agreements is 50%
- AP cannot pay from a quote or proforma invoice

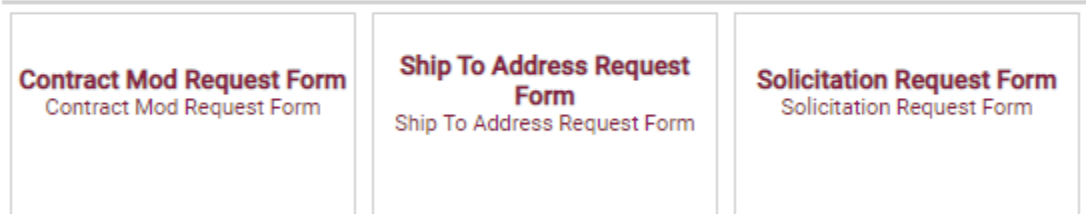
- AP must have documentation from the company stating prepayment or deposit is required

## **Procurement Request Forms**

There are three Procurement Related Forms located on the home page of HokieMart:

1. Ship to Address Request Form
2. Contract Mod Request Form
3. Solicitation Request Form

### **Procurement Related Forms**



These forms are not used to purchase goods or services, but rather are used to make various requests to Procurement.

## Ship to Address Request Form

The Ship to Address Request Form is used to notify Procurement of a request to add or make a change to a Virginia Tech ship to address location. *Please note that new requests must be for an affiliated Virginia Tech address.*

To open up a new form, click on the Ship to Address Request tile on the home page of HokieMart.

### Instructions

Ship To Address Request ...	Instructions	Request Actions ▾   History   ?
Form Number <b>4985345</b> Purpose <b>Generic Request</b> Status <b>Incomplete</b>	The purpose of this form is to notify Procurement of a request to add or make a change to a Virginia Tech Ship To Address location. <i>Please note this must be an affiliated Virginia Tech address.</i>	
<b>Instructions</b>		
Attachments <span>✓</span>		
Questions <span>✓</span>		
Review and Submit		
Discussion		
Form Approvals		
		<a href="#">Next ▶</a>

The left-hand side will show some auto generated information, such as the form number and status, and a list of the tabs you will need to fill out prior to submitting the form.

Click Next to begin your request.

### Attachments

Ship To Address Request ...		Attachments	Request Actions	History	?
Form Number	4985345	Please add your attachments below.			
Purpose	Generic Request	<input type="button" value="Add Attachment"/>			
Status	Incomplete				
Instructions		<div style="text-align: right;"> <input type="button" value="Previous"/> <input type="button" value="Save Progress"/> <input type="button" value="Next"/> </div>			
<b>Attachments</b>	✓				
Questions	✓				
Review and Submit					
Discussion					
Form Approvals					

Users have the option to add any supporting documentation that would help explain their request. Attachments are optional and not required to submit your request.

## Questions

The first section of information that must be filled out is the General Information.

Ship To Address Request ...		Questions - Page 1	Request Actions	History	?
Form Number	634504	★ Response Is Required			
Purpose	Generic Request	<b>On This Page</b> General Information (3) New Address or Change of Address (15) Reason for Request (1)			
Status	Incomplete	<b>General Information</b> Date of Request? *			
Instructions		<input type="text"/> <input type="button" value="Calendar"/> <small>mm/dd/yyyy</small>			
Attachments	✓	Department of Requestor? *			
<b>Questions</b>	✓	<input type="text"/>			
Review and Submit		Phone Number of Requestor?			
Discussion		<input type="text"/>			
Form Approvals					

- Enter the current date for Date of Request.
- Enter your department as the requestor on the form.
- Enter your phone number to be used for any follow up questions regarding this form.

Next, indicate the type of request from the drop down.

▼ **New Address or Change of Address**

Is this a request for a new Ship To Address to be added or a request for a change to an existing Ship To Address? \*

- Select **Add a New Ship to Address** to request a completely new Virginia Tech ship to address that does not already exist in Hokiemarkt.
- Select **Change to an existing Ship to Address** to request an edit to an existing Virginia Tech address in Hokiemarkt.

Once a selection is made, additional questions depending on the type of request will appear.

## Add a New Ship to Address Questions

1st Address Line / Department Name \*

2000 characters remaining

2nd Address Line / Room and Building \* ⓘ

2000 characters remaining

3rd Address Line / Street Name and Number

2000 characters remaining

City \*

State \* ⓘ

Zip Code \* ⓘ

Current Virginia Tech Mail Address at this Location?

2000 characters remaining

- Enter the following information:
  - Department name
  - Room and Building (if not applicable, type NA)
  - Street Number and Name
  - City
  - State
  - Zip Code
  - And the current Virginia Tech Mail Code at that location

## Change to an existing Ship to Address Questions

Current Ship to Address? \*

2000 characters remaining

- Enter the Current Ship to Address that needs to be edited

1st Address Line / Department Name \*

2000 characters remaining

City \*

2nd Address Line / Room and Building \* ?

2000 characters remaining

State \* ?

3rd Address Line / Street Name and Number

2000 characters remaining

Zip Code \* ?

- Enter the following information as you want the edited address to appear in HokieMart:
  - Department name
  - Room and Building (if not applicable, type NA)
  - Street Number and Name
  - City
  - State
  - Zip Code

*Please note, enter information in each box, even if it is staying the same.*



Both the **Add a New Ship to Address** and **Change to an existing Ship to Address** forms require a Reason for Request.

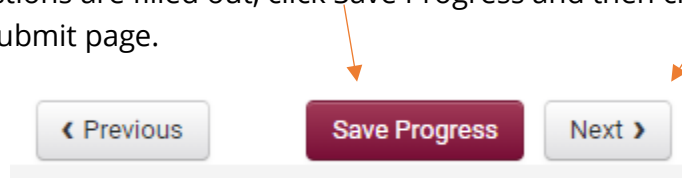
▼ **Reason for Request**

Please explain why the Ship To Address is being changed or added. ★

2000 characters remaining

For example, a department may have moved offices and needs their ship to address updated or there is a new building established on campus that needs a new ship to address.

Once all of the Questions are filled out, click Save Progress and then click Next to progress to the Review and Submit page.



## Review and Submit

The final page of the form provides a check to ensure all required fields were completed.

**Ship To Address Request ...**

Form Number **635158**  
Purpose **Generic Request**  
Status **Incomplete**

Instructions  
Attachments   
Questions

**Review and Submit**

Discussion  
Form Approvals

**Review and Submit**

Request Actions | History | ?

✓ Required Fields Complete

Section	Progress
Attachments	✓ Required Fields Complete
Questions	✓ Required Fields Complete

◀ Previous   Add to Favorites   Submit

If any of the required fields were not completed, you can use the menu on the left hand side to navigate back to the tab that needs to be fully completed before submission.

Once everything is complete, click Submit.

**Confirm**

Are you sure you want to submit this form?

Yes No

Select Yes to confirm submission of the form.

Once submitted, the Status of the form changes to "Under Review". You can view where the form is in the workflow by clicking Form Approvals.

**Ship To Address Request ...**

Form Number **635158**  
Purpose **Generic Request**  
Status **Under Review**

Instructions  
Attachments   
Questions   
Review and Submit  
Discussion

**Form Approvals**

Show skipped steps

Orientation **Horizontal**

Submitted 12/10/2021 8:46 AM

**Form - Generic Approval Proc**  
Active  
View approvers

Finish  
Expedite

Once approved, you will receive an email from a Procurement Form Approver confirming that the changes are made or the new address has been added in to HokieMart. The form will also show in approved Status.

### Ship To Address Request ...

Form Number **635158**  
Purpose **Generic Request**  
Status **Approved**

Instructions  
Attachments ✓  
Questions ✓  
Review and Submit  
Discussion

### Form Approvals

Show skipped steps   
Orientation Horizontal ▾

**Submitted**  
12/10/2021 8:46 AM

**Form - Generic Approval Proc**

Approved ✓  
✓ Erin Griffin

**Completed**  
12/10/2021 8:49 AM

## Contract Mod Request Form

The Contract Mod Request Form is used to notify Procurement of a modification to an existing contract with a Virginia Tech vendor.

To open up a new form, click on the Contract Mod Request tile on the home page of HokieMart.

### Instructions

The screenshot shows a web interface for the 'Contract Mod Request Form'. The left sidebar contains a header 'Contract Mod Request Form' and a table with the following data:

Form Number	<b>635209</b>
Purpose	<b>Generic Request</b>
Status	<b>Incomplete</b>

Below the table is a list of instructions with progress indicators:

- Details ✓
- Attachments ✓
- Questions ✓
- Review and Submit

The main content area is titled 'Instructions' and contains the text: 'The purpose of this form is to notify Procurement of a modification to an existing contract with a Virginia Tech Vendor.' In the top right corner of the main area, there are links for 'Request Actions', 'History', and a question mark. A 'Next >' button is located in the bottom right corner of the main area.

The left-hand side will show some auto generated information, such as the form number and status, and a list of the tabs you will need to fill out prior to submitting the form.

Click Next to begin your request.

## Details

### Contract Mod Request Form

Form Number **635209**  
Purpose **Generic Request**  
Status **Incomplete**

Instructions

**Details** ✓  
Attachments ✓  
Questions ✓  
Review and Submit

Discussion  
Form Approvals

### Details

Request Actions | History | ?

Form Name \*

Purpose **Generic Request**

Template Title **Contract Mod Request Form**

Form Type **Contract Mod Request**

★ Required

[← Previous](#) [Save Progress](#) [Next →](#)

The Details tab shows auto populated details about this specific form. There is nothing the user needs to fill out on this tab. Click next to begin the form.

## Attachments

### Contract Mod Request Form

Form Number **635209**  
Purpose **Generic Request**  
Status **Incomplete**

Instructions

Details ✓  
**Attachments** ✓  
Questions ✓  
Review and Submit

Discussion  
Form Approvals

### Attachments

Request Actions | History | ?

*Please add your attachments below.*

[Add Attachment](#)

[← Previous](#) [Save Progress](#) [Next →](#)


Users have the option to add any supporting documentation that would help explain their request. Attachments are optional and not required to submit your request.


## Questions


The first section of information that must be filled out is the **Contract Information**.

### ▼ Contract Information

Date of Request \*

  
mm/dd/yyyy

Department Name \* 

Contract Administrator \* 

Contract Administrator's Phone Number \*

Contract Number \*

Vendor Name \*

Is this an ITPALS Contract? \* 

Yes  No

Enter the following Contract information:

- Current date as the Date of Request
- Department Name
- Name of the Contract Administrator
- Contract Administrator's Phone number
- Contract Number
- Vendor Name
- Indicate if the contract is an ITPALS Contract

*Helpful tip: Hover your mouse over the  icon to view help text!*

Each Contract Mod form request must have a **Reason for Modification**. Select the reason and provide a brief description for the modification to the service or product.

**Reason for Modification**

What is the reason for this modification? \*

Price Adjustment     Vendor Name Change     Vendor Contact Name Change  
 Payment Terms     Vendor Address Change     Other

Modify Service or Product ?

2000 characters remaining

Depending on the reason selected, additional text boxes may appear for an explanation of the modification.

## Review and Submit

The final page of the form provides a check to ensure all required fields were completed.

**Contract Mod Request Form**    **Review and Submit**    Request Actions ▾ | History | ?

Form Number **635209**  
Purpose **Generic Request**  
Status **Incomplete**

Instructions

Details ✓

Attachments ✓

Questions ✓

**Review and Submit**

Discussion

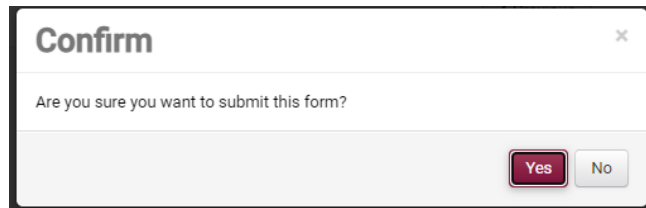
Form Approvals

Section	Progress
Details	✓ Required Fields Complete
Attachments	✓ Required Fields Complete
Questions	✓ Required Fields Complete

◀ Previous    Add to Favorites    **Submit**

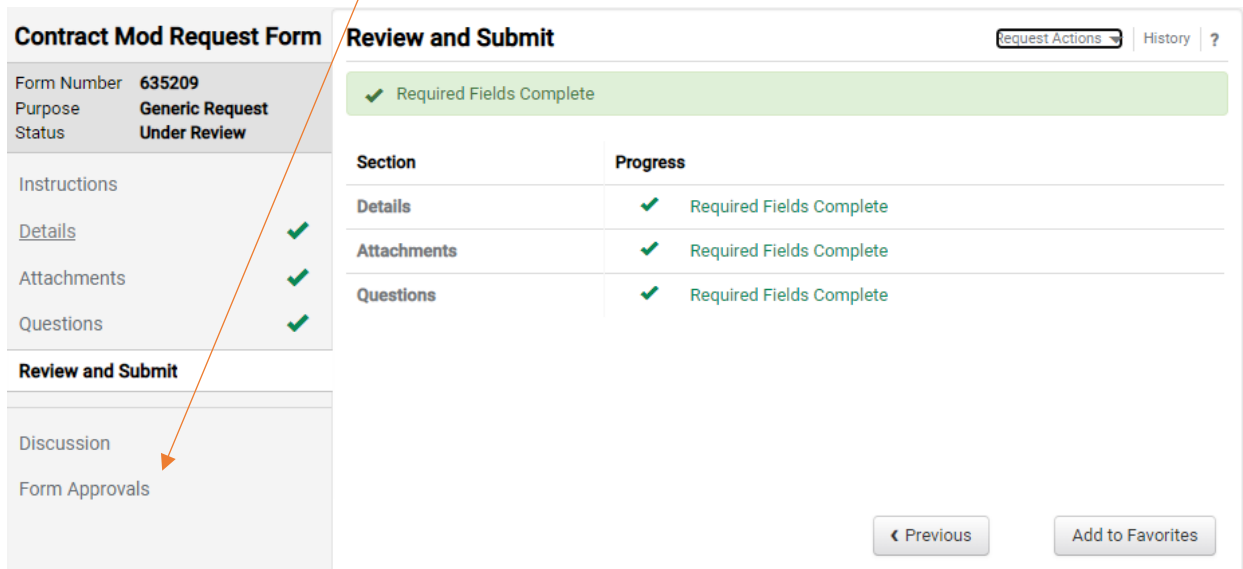
If any of the required fields were not completed, you can use the menu on the left hand side to navigate back to the tab that needs to be fully completed before submission.

Once everything is complete, click Submit.



Select Yes to confirm submission of the form.

Once submitted, the Status of the form changes to "Under Review". You can view where the form is in the workflow by clicking Form Approvals.

The screenshot shows the "Contract Mod Request Form" interface. On the left is a sidebar with navigation options: "Instructions", "Details" (with a green checkmark), "Attachments" (with a green checkmark), "Questions" (with a green checkmark), "Review and Submit" (highlighted), "Discussion", and "Form Approvals". An orange arrow points from the "Form Approvals" link in the sidebar to the "Form Approvals" section in the main content area. The main content area is titled "Review and Submit" and includes a "Request Actions" dropdown, "History", and a "?" icon. A green banner at the top indicates "Required Fields Complete". Below this is a table showing the progress of different sections:

Section	Progress
Details	✓ Required Fields Complete
Attachments	✓ Required Fields Complete
Questions	✓ Required Fields Complete

At the bottom right of the main content area, there are two buttons: "Previous" and "Add to Favorites".

Once approved, you will receive an email from a Procurement Buyer confirming the changes have been added in to HokieMart. The form will also show in approved Status.



## Solicitation Request Form

The Solicitation Request Form is used to notify Procurement of a request to create a solicitation for a good or service.

To open up a new form, click on the Solicitation Request tile on the home page of HokieMart. This will open a new tab to initiate your sourcing request. Enter in a title description of what you are needing. Then click **Open Request Form**.

**Initiate Sourcing Request** [Close]

Sourcing Request Title \*

Sourcing Request Template Solicitation Request Form for Sourcing

\* Required **Open Request Form** Close

## Instructions

You will now be on the Instructions tab of the form. The Sourcing Request Title now shows on the top left-hand corner of the form. Move through each tab on the left by clicking **Next** at the bottom of the form and fill out the requested information.

**Housekeeping Services** **Instructions** [Print Request](#) [Request Actions](#) [History](#) [?](#)

Form Number **768893**  
Purpose **Sourcing Event Request**  
Status **Incomplete**

Details

**Instructions**

Attachments   
Questions   
Product Line Items   
Service Line Items   
Suppliers   
Review and Submit

Form Approvals

This Solicitation Request Form should be used to initiate a request for VT Procurement to create a solicitation on your behalf.

Please note that you must include *at least* one Product **OR** Service Line Item.

If you have any questions about your request, please contact [procurement@vt.edu](mailto:procurement@vt.edu).

[Previous](#) [Next](#)

# Attachments

Housekeeping Services	
Form Number	768893
Purpose	Sourcing Event Request
Status	Incomplete
Details	✓
Instructions	
<b>Attachments</b>	✓
Questions	▲
Product Line Items	▲
Service Line Items	▲
Suppliers	✓
Review and Submit	
Form Approvals	

## Attachments

[Print Request](#) | [Request Actions](#) | [History](#) | [?](#)

Please add your attachments below.

[Add Attachment](#)

[← Previous](#)

[Save Progress](#)

[Next →](#)

Users have the option to add any supporting documentation that would help explain their request. Attachments are optional and not required to submit your request.

## Questions

Fill out the following **General Information** regarding the nature of this solicitation request.

### ▼ Sourcing Request - General Information

Department Name <sup>★</sup> 🔍

**Enter the name of your department**

Who will be the point of contact for this solicitation in your department? <sup>★</sup>

**Enter the name of the person who will be the point of contact in your department to work with Procurement on this solicitation.**

Please provide contact information for the individual who will be the point of contact for this solicitation (e.g., email, phone number) <sup>★</sup>

2000 characters remaining

**Type the contact information for the point of contact listed above. This will be the way the Procurement Buyer will contact the Department point of contact with any questions.**

Purchasing Category <sup>★</sup>

**Select the Purchasing Category. The two options are (1) Goods and Services and (2) Construction.**

Do you have suggested Vendors? <sup>★</sup> 🔍

Yes  No

**Indicate if you have any suggested Vendors. If yes is selected, additional text boxes will appear for you to enter vendor contact information.**

When are the goods or services required? ★

**Indicate the date that the goods or services are needed.**

Is this solicitation grant funded? ★

Yes  No

**Indicate if this will be funded by a grant. If so, enter the grant number on the following question.**

If the solicitation is grant-funded, please provide the grant number

Please provide a brief scope of work for this solicitation.

2000 characters remaining

**Type in a brief description of the scope for this solicitation.**

Other Information

2000 characters remaining

**Enter any additional information that may be helpful for the buyer to review.**

Have you uploaded any relevant documentation in the Attachments Section of this form (e.g., Statement of Work)? ★

**Double check that you have added any attachments back on the attachments tab. If no attachments were needed, answer Not Applicable to this question.**

## Product/Service Line Items

At least one Product or Service line item is needed to submit the form. To add a line item, click **Add Product Line Item** and a box will appear for you to type in your line item information.

**Housekeeping Services**

Form Number **768893**  
Purpose **Sourcing Event Request**  
Status **Incomplete**

Details ✓  
Instructions  
Attachments ✓  
Questions ✓  
**Product Line Items** ▲  
Service Line Items ▲  
Suppliers ✓  
Review and Submit  
Form Approvals

**Product Line Items** [Print Request](#) | [Request Actions](#) ▼ | [History](#) | ?

Please add your first Product Line Item.

[Add Product Line Item](#) ▼

[< Previous](#) [Save Progress](#) [Next >](#)

The only required fields are the Name of the item and the quantity needed. Additional information such as description, catalog number, unit of measure, and price are optional.

**Add Product Line Item** ×

Name \*

Description   
2500 characters remaining

Catalog Number

Quantity \*

Unit of Measure

Commodity Code -

Historical Unit Price  USD

Target Price  USD

\* Required

## Suppliers

The Suppliers tab is not used at this time; no entry is needed on the Suppliers tab.

## Review and Submit

The final page of the form provides a check to ensure all required fields were completed.



If any of the required fields were not completed, you can use the menu on the left hand side to navigate back to the tab that needs to be fully completed before submission.

Click **Submit** to submit the form to Procurement.

Once submitted, the Status of the form changes to “Under Review”. You can view where the form is in the workflow by clicking Form Approvals.

**Housekeeping Services**

Form Number **768893**  
Purpose **Sourcing Event Request**  
Status **Under Review**

Details ✓  
Instructions ✓  
Attachments ✓  
Questions ✓  
Product Line Items ✓  
Service Line Items ✓  
Suppliers ✓

**Review and Submit**

Print Request | Request Actions ▼ | History

✓ Required Fields Complete

Section	Progress
<b>Details</b>	✓ Required Fields Complete
<b>Attachments</b>	✓ Required Fields Complete
<b>Questions</b>	✓ Required Fields Complete
<b>Product Line Items</b>	✓ Required Fields Complete
<b>Service Line Items</b>	✓ Required Fields Complete
<b>Suppliers</b>	✓ Required Fields Complete

Form Approvals

◀ Previous

Once approved, you will receive an email from a Procurement Buyer to discuss the next steps of your solicitation. The form will also show in approved Status.

## **Additional Resources**

### **Selecting Account Codes**

Selecting the right account code is important not only to classify your expenditure, but it can also affect the workflow process that your requisition will route through. Choosing the incorrect account code can lead to longer processing times for your purchases.

For example, using account code 22413 when purchasing a Laser Engraver will route your requisition to Environmental Health and Safety to obtain the proper approvals before the Purchase Order is issued to the vendor.

A complete listing of account codes may be found on the Controller's Office website:  
<https://www.controller.vt.edu/accountcodes.html>

There are a few internal vendors who require account code 1244R to be used on requisitions for their services. Any requisition submitted to one of these vendors that does not use account code 1244R will automatically fail. [Click here](#) to view the listing of Official University Service Centers requiring the 1244R account code.

## Invoices/Credit Memos

### Credit Memos in HokieMart

Credit memos cannot be processed in HokieMart. Please send the hard copy/paper credit memo to the Controller's Office (MC 0312) with the applicable PO number written in the upper, right-hand corner.

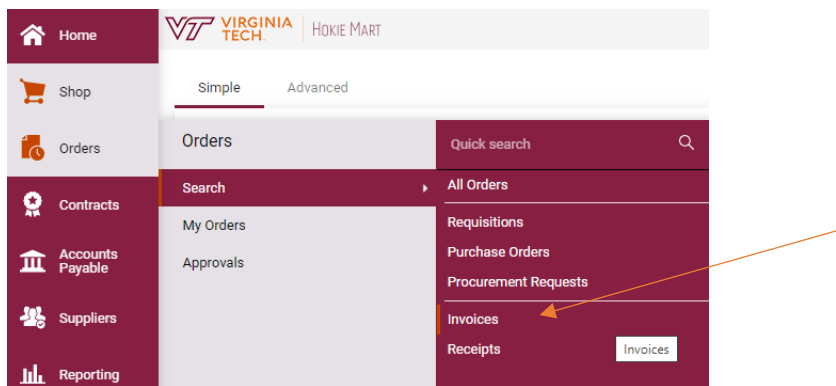
The Controller's office will process the credit memo and close out the invoice. To have the encumbrance released from a PO with a credit memo applied by AP, please contact [hokiemart@vt.edu](mailto:hokiemart@vt.edu).

### eInvoicing

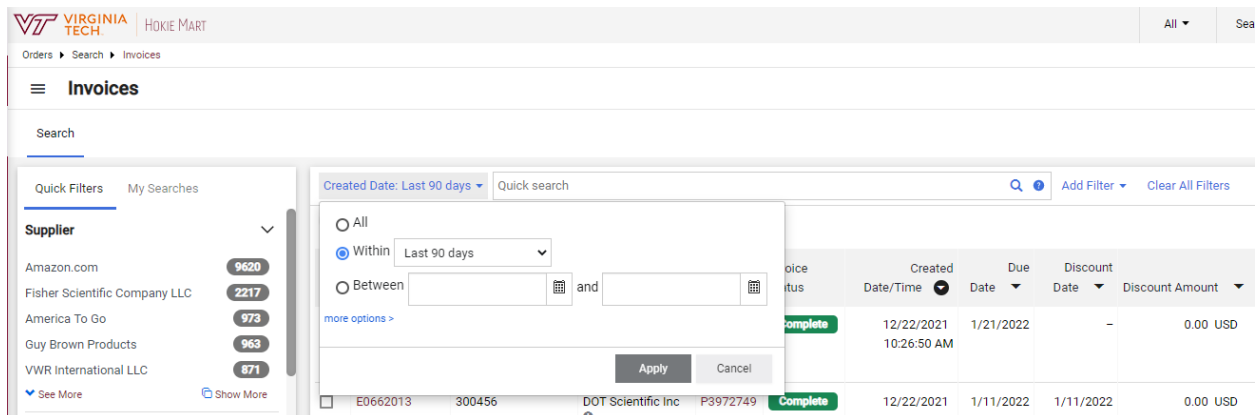
There are several suppliers who electronically invoice (eInvoice) the university. There are two options to view eInvoices.

#### Option #1

When the PO number is not known or user wishes to view multiple eInvoices, navigate to Orders → Search → and select Invoices:



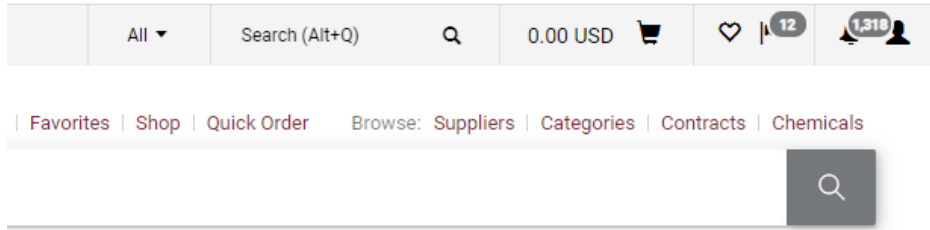
Users can then select filters such as date range, supplier, account, fund, etc.



#### Option #2

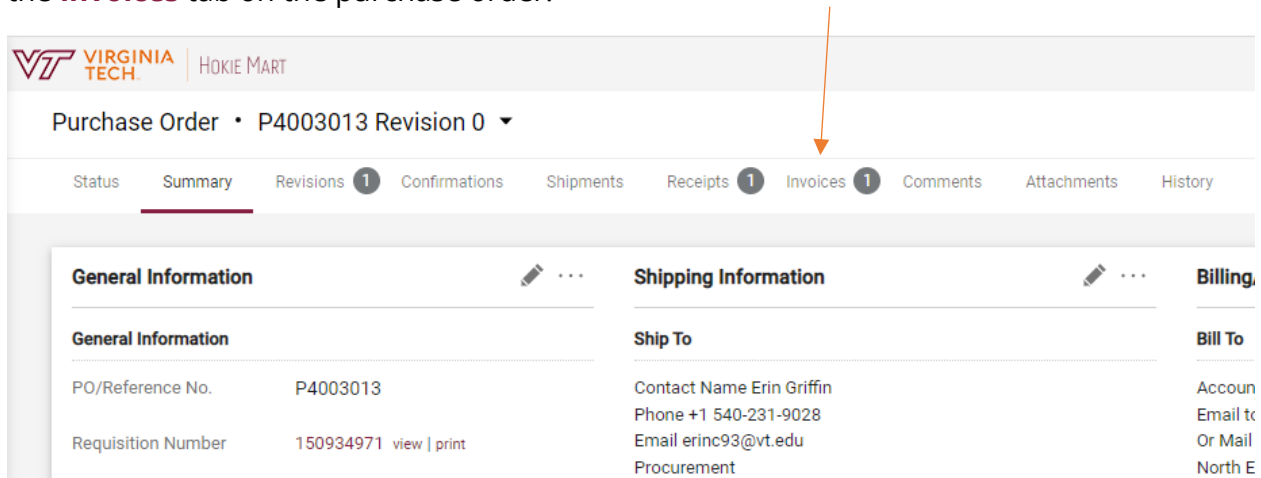


When the PO number or invoice number is known, the user can search using the Quick Search feature located on the right side of the top menu bar.

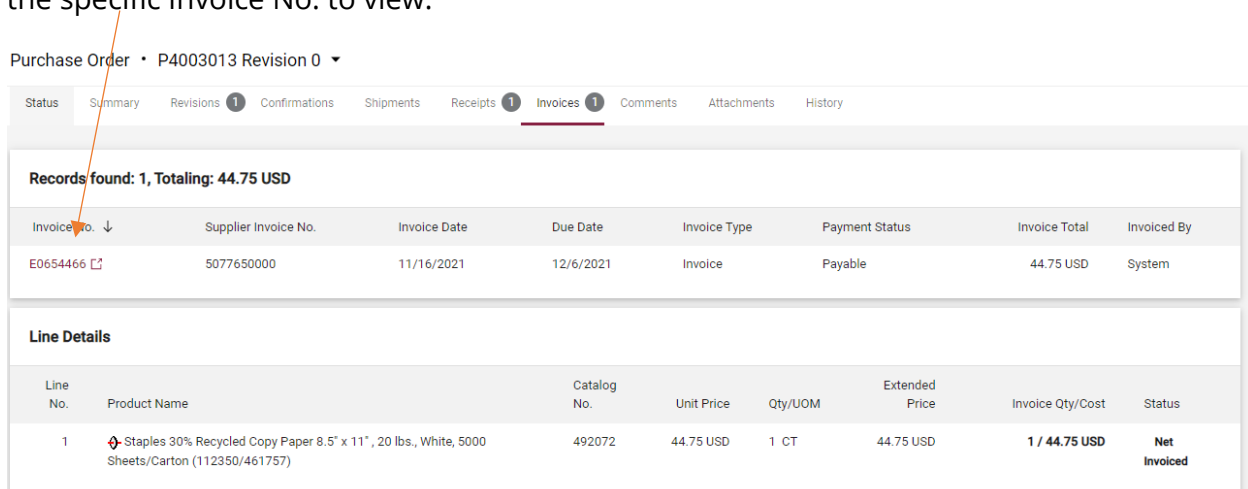


If the invoice number is entered in and searched, the user will be taken directly to that e-invoice.

If the PO number is entered in and searched, the user will be taken directly to that PO. Click the **Invoices** tab on the purchase order.



Any invoices belonging to that Purchase order will be displayed on the Invoices tab. Click on the specific Invoice No. to view.




You will then see the invoice and can print or save a PDF copy by selecting the printer icon on the top right hand corner.

Invoice • E0654466 ▾

☰ 👁 🖨 ?

Summary Comments Attachments History

General		Addresses		Note/Attachments	
Invoice Type	Invoice	<b>Remit To</b>		External Note	<i>no value</i>
Pay Status	Payable	PO Box 306229 Nashville, Tennessee 37230-6229		Internal Note	<i>no value</i>
Invoice Number	E0654466	United States		External Attachments	
Supplier Invoice No.	5077650000	Address Id Vendor Payment Address 2		Internal Attachments	
Supplier Name					

## Invoice Imaging

Accounts Payable invoices can be viewed directly from Banner. Please review [Procedure 21005a: Invoice Imaging](#) for information on how to access Accounts Payable invoice images.

Please note that images are available for accounts payable invoices from July 1, 2007 forward. This does not include e-invoices.

## General Contact Information

<b>HokieMart</b>	Questions concerning HokieMart functions (rejected/pending PR's and PO's), appropriate form usage and procedures, vendor receipt of orders: <a href="mailto:HokieMart@vt.edu">HokieMart@vt.edu</a>
<b>Accounts Payable</b>	Questions concerning the payment of invoices, encumbrances, expenditures: <a href="mailto:acctpay@vt.edu">acctpay@vt.edu</a>
<b>Fixed Assets</b>	Questions regarding fixed assets, please contact <a href="mailto:VTFixedAssets@VT.edu">VTFixedAssets@VT.edu</a>
<b>Receiving</b>	Questions concerning electronic receiving: Rebecca Goad <a href="mailto:rg91acct@vt.edu">rg91acct@vt.edu</a>
<b>Banner Reports</b>	Questions concerning Banner Finance Reports: <a href="mailto:genactg@vt.edu">genactg@vt.edu</a>
<b>HokieMart Access</b>	Questions concerning updating or adding roles (Receiver, Requestor, Approver) or access to funding: General Accounting <a href="mailto:genactg@vt.edu">genactg@vt.edu</a>

## Helpful links/Websites

Additional HokieMart material and HokieMart User Quick Guides may be found on the Procurement website: <https://www.procurement.vt.edu/hokiemart.html>

Vendors that do not accept HokieMart POs (please use a P-card):  
<https://www.procurement.vt.edu/hokiemart/xvendors.html>

Issues of the HokieMart Newsletter, The Cart, may be found at:  
<https://www.procurement.vt.edu/hokiemart/cart.html>

*\*\*Please note if you are an active user in HokieMart, you will receive The Cart newsletter.*

Latest updates about upcoming HokieMart upgrades can be found at:  
<https://www.procurement.vt.edu/hokiemart/updates.html>