



### Change in Banner PO Import

#### Topics in this Issue:

- Change in Banner PO Import
- Banner Purchase Order Import into HokieMart
- Zero Dollar PRs
- Header Level Split Funding
- Perform Receiving Function Timely to Ensure Invoice Discounts are Honored

#### Contract Corner:

- CDW-G
- New England Biolabs
- MedSupply Partners

On January 18, 2013 changes were made to the process which imports PO's from Banner to HokieMart. These changes enable more detailed information such as payment terms, notes to vendor, and Purchasing Department buyer contact information to be included on the PO. These changes also modified the appearance of the faxed PO's created by departments to vendors. *See page 7 for more information on the changes.*

As a result of these changes, we have revised the Banner import information. This information will also be posted on the Purchasing Departments web-site under the Training Material link and can be found in the Quick Guide Section. You can always contact the HokieMart Help Desk at [hokiemart@vt.edu](mailto:hokiemart@vt.edu) for additional assistance.

### Banner Purchase Order Import into HokieMart

Updated Procedures: 01-18-13

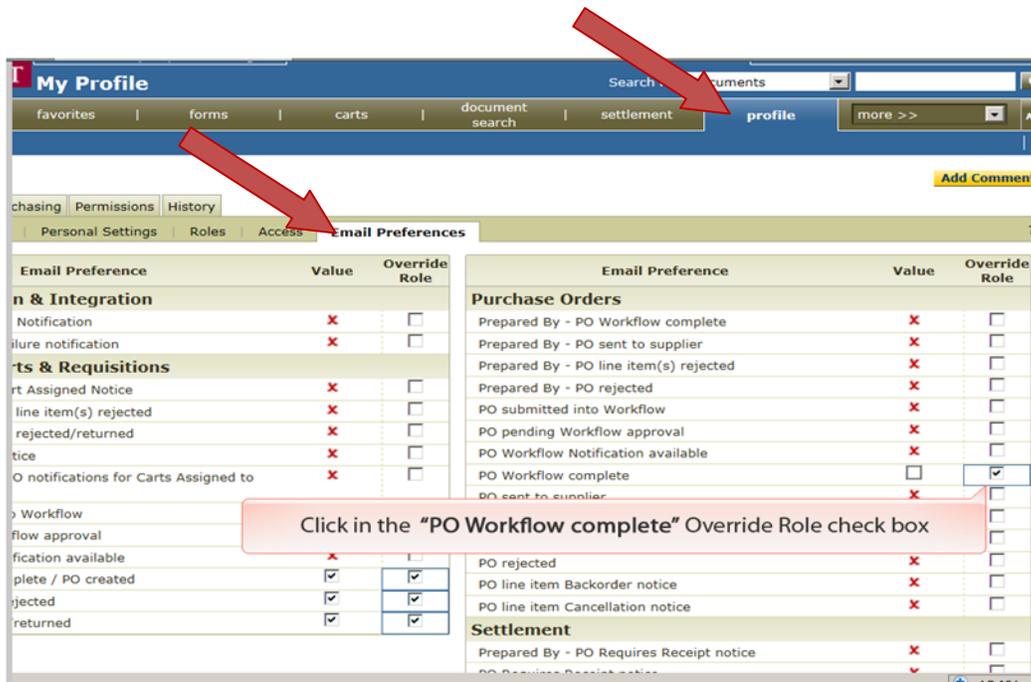
When a Requestor creates a Purchase Requisition (PR) in HokieMart that exceeds the delegated departmental authority, the **Purchasing Department** creates the Purchase Order (PO) in Banner. Once the PO is completed, it is imported into HokieMart and an email notification is sent to the Requestor, provided the email preference option is selected for this feature. Instructions for enabling this notification are described below.

#### Step 1: Update and add additional HokieMart Email preference

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In HokieMart starting from the Home/Shop page:

- click on the **Profile** tab located at the top right side of the screen. Under the **Profile** tab the Requestor will find a new set of tabs.
- select the **Email Preferences** tab. This is the screen page where Requestors can personalize the email notifications that can be received from the system. When actions are performed in HokieMart, emails can automatically be generated to notify users of these actions.
- click in the "PO Workflow complete" Override Role check box to enable, as shown below. Remember to click **Save** on the bottom of your screen before exiting.



- This feature should be added to any other automated messages you already receive.

When the “PO Workflow Complete” email preference is set, an email will be sent when the PO is imported into HokieMart. The email will contain a link to the imported PO. See sample email below.

From: support@sciqwest.com  
 To: Atkins, Regina  
 Cc:  
 Subject: Workflow Routing Completed for Purchase Order#: P2317313

Sent: Thu 1/17/2013 11:00 AM

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Re: WORKFLOW ROUTING COMPLETED FOR PURCHASE ORDER#: P2317313

Dear Regina Atkins,

The purchase order listed above has completed workflow routing. You can update and track the status of purchase orders on-line by using "My Requisitions," or by selecting the URL below.

<https://usertest.sciquest.com/apps/Router/POstatus?poId=1354947&AuthUser=434303&tmstmp=1358440276404>

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If you have any questions with regard to this Purchase Order, please contact your SelectSite Support Team.

Support Team Contact Information:  
 +1 (540) 231-2020  
[HokieMart@vt.edu](mailto:HokieMart@vt.edu)

Thank you,  
 Virginia Polytechnic Institute & State University

The following notes were attached to this purchase order during the workflow process:

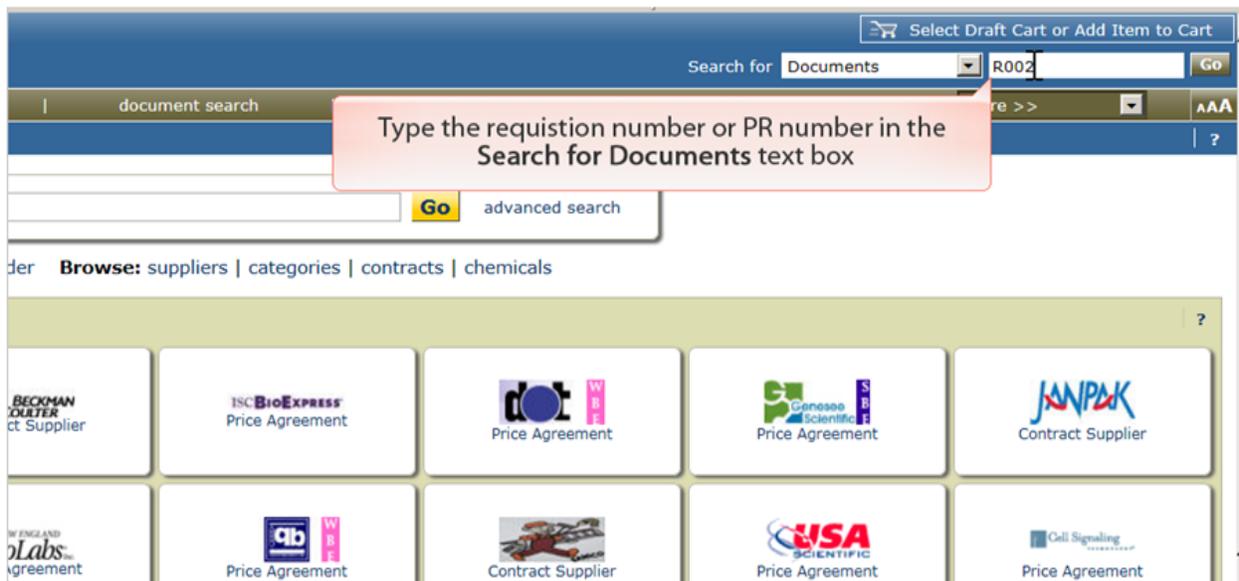
Continue next page →

**NOTE: We recommend that this email notification is set to assure prompt notification of purchase order completion by the Purchasing Department.** However, if the preference is not set, the PO can be found by using the “Search For” feature as outlined below.

## Step 2: How to locate a PO through the “Search For” feature

The “Search For” feature allows the Requestor to locate a PO with either the *HokieMart* requisition number (contains no alpha characters) or the *Banner* requisition (RXXXXXXX) number. With either requisition number, the Requestor is now able to locate all of the associated related documents.

1. Type in either the HokieMart PR number or the Banner PR number.

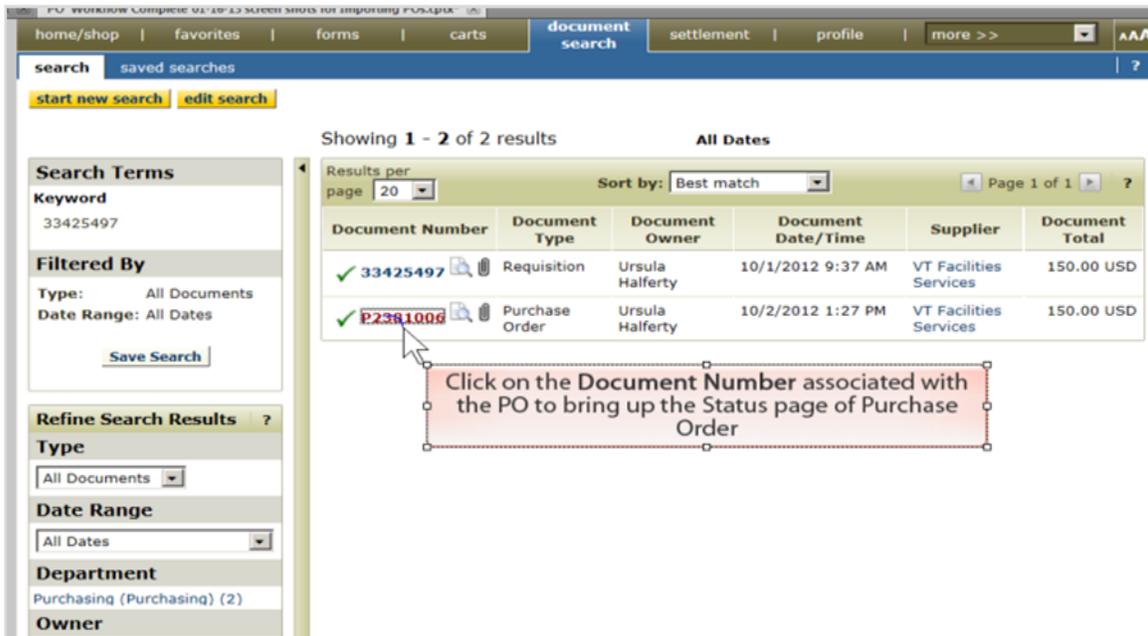


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- The system will return one or multiple related search result items. Click on **Return to Search Results** to bring up the list.



- Under the **Document Number** column click on the purchase order, identified by the starting "P" number.



4. Once the document is open click on the **Purchase Order** tab where you will be able locate the Banner requisition number or HokieMart PR number in their usual locations on the screen.

**MART Status - PO P2381006**

Search for Documents [Go]

home/shop | favorites | forms | carts | document search | settlement | profile | more >> | AA/

search | saved searches | ?

Return to Search Results | 2 of 2 results | Document Number(s) P2381006 (Purchase Order)

PO/Reference No. **P2381006 Revision 0** Available Actions Add Comment [Go]

Supplier **VT Facilities Services**

Status **Purchase Order** Revisions PO Approvals Shipments Receipts Invoices Comments Attachments (2) History

Summary Accounting Codes

General Information		Document Status	
PO/Reference No.	<b>P2381006</b>	A/P status	Open
Revision No.	0	Workflow	✓ Completed (10/2/2012 1:28 PM)
Purchase Order Date	10/2/2012	Distribution	The system distributed the purchase order using the method(s) indicated below the last time it was distributed: Email (HTML Attachment): HokieServ@vt.edu 10/2/2012 1:28 PM
Supplier Name	VT Facilities Services more info...	Supplier	Sent To Supplier view
Total	150.00		
Owner Name			
Owner Phone			
Owner Email			
Requisition Number	33425497 view   print		

**Line Item Status**

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing
1 ✓ Pick up and transport 50 storage boxes from Purchasing Dept and deliver to Records Management Warehouse more info...	ISR	LO	150.00	1 LO	150.00 USD	Sent To Supplier	none	none

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

**Total 150.00 USD**

End

## Zero Dollar PRs

Purchase Requisitions (PRs) should not be created with zero dollars on the line item/s which would in turn result in a zero dollar purchase order. These PRs will be returned in HokieMart to your Draft Cart with the message:

“The purchase requisition was returned because the document was submitted for Zero Dollars”.

The User should add a dollar amount and then resubmit the PR.

### **Important Note:**

The only exception to this are PRs created to “Best Vendor” and they may remain at zero dollars.

## Header Level Split Funding

Split fund by dollars has been available for users since 2008. A quick guide for this procedure may be found on the Purchasing Department web-site:

[http://www.purch.vt.edu/HokieMart/QuickGuides/Requestor/Split\\_Funding\\_by\\_Dollars.pdf](http://www.purch.vt.edu/HokieMart/QuickGuides/Requestor/Split_Funding_by_Dollars.pdf).

We encourage you to split funds by dollars on the header accounting block rather than the line item.

## Perform Receiving Function Timely to Ensure Invoice Discounts are Honored

Recent enhancements in the Banner Finance system allows the University to record and track purchase order and invoice discounts more efficiently. To obtain the vendor discount, the receiving function must be done timely by the department so that the invoice can be paid in time to qualify for the discount. The invoice cannot be paid until the department does the receiving in HokieMart.

If departments receive the invoice directly from the vendor and a discount is applicable on the purchase order, the invoice should be sent to the Controller's Office with the words "EXPEDITE-Discount" written on the front of the invoice. This will alert the Accounts Payable staff to process the invoice as soon as possible to obtain the discount.

If a purchase order has terms that are not net 30 days (i.e.net 20 days), the invoice must be paid within the special net payment terms. If not, the invoice will appear as an exception on the department's prompt payment report. A small percentage of purchase orders have net terms other than 30 days. Occasionally a vendor will require special terms before they will accept an order.

## CDW-G New Contact

Mitch Huffington and Jason Guenther are now the account representatives serving VT. They each bring with them 9 years of customer service experience with CDW-G. Their contact information is:

Mitch: 866-723-1550 fax: 847-968-1362

Jason: 866-723-3395; fax 847-968-1378

Team Email: [jmc@cdwg.com](mailto:jmc@cdwg.com)

## New England Biolabs (NEB)

Have announced a 2.3% price increase effective Jan 1, 2013. Orders totaling \$300 or more receive free shipping. Orders under \$300 will be charged a flat rate of \$23.00 for shipping.

## MedSupply Partners Added as a Vendor for Life Sciences Laboratories

MedSupply Partners product lines consist of over 85,000 products with a focus on molecular biology, tissue culture, histology, chemistry, HPLC, lab safety, and general laboratory supplies. This includes lab consumables, reagents, chemicals, and equipment. The company originated in 2003 and has over 40 years of industry experience.

Your VT contact is Lee Haltiner;

Email: [lhaltiner@medsupplypartners.com](mailto:lhaltiner@medsupplypartners.com);

Voicemail: 877-633-7779 ext. 121;

Website: [www.medsupplypartners.com](http://www.medsupplypartners.com).

Lee can provide technical assistance, as well as special customized quotes.

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The Cart is distributed on an "as needed" basis and we appreciate your input. Please send an email to [hokie-mart@vt.edu](mailto:hokie-mart@vt.edu) with the subject line: The Cart Suggestions.

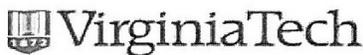
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## Change in Banner PO Import

The Requestor information previously contained in the area labeled section ①, can now be found under **Delivery Information** in the section labeled ②. The message information “no value” in area ① will appear as shown below and populates automatically as the default message when the

PO created is within the departmental authority (dollar amount).

When a PO is over the departmental authority and/or is processed through the Purchasing Department, such as the case of “Best Vendor”, area ① will now populate with the contact information of the Buyer. This will make it easier for the Requestor to follow up with the Buyer if there are any questions on the PO.



### PURCHASE ORDER

Virginia Polytechnic Institute and State University		
Purchase Order Date	PO/Reference No.	Revision No.
<b>1/22/2013</b>	<b>P2426009</b>	<b>0</b>
Bid/Req Number	<i>no value</i>	
After Hours Number	<i>no value</i>	
Buyer Name	<i>no value</i>	
Fax Number	<i>no value</i>	
Buyers Phone Number	<i>no value</i>	

#### Order acceptance instructions:

This transaction shall be governed by the laws of the Commonwealth of Virginia and the provisions of the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors (<https://vascupp.org/hem.pdf>).

Terms and Conditions found at this web site: [www.purch.vt.edu/html.docs/terms.html](http://www.purch.vt.edu/html.docs/terms.html)

Supplier Information	Billing Address	Delivery Information
Lin Engineering 16245 Vineyard Blvd Morgan Hill, CA 95037 US Phone +1 (408) 919-0200 Fax +1 (408) 919-0201	Virginia Polytechnic Institute & State University Accounts Payable 201 Southgate Center Mail Code 0312 Blacksburg, VA 24061 United States	<b>Delivery Address</b> Virginia Polytechnic Institute & State University Contact Name Kevin Hoopes Mechanical Engineering 114 Randolph Hall Blacksburg, VA 24061 United States Phone +1 (540) 231-1673 Email woodyaj@vt.edu <b>Delivery Information</b> Requested Delivery Date Ship Via Best Carrier-Best Way Owner Name Jacqueline Woodyard Owner Phone +1 (540) 231-1673 Owner Email woodyaj@vt.edu
Billing Information		
F.O.B.	N/A	
Contract	<i>no value</i>	
Notes to Supplier		
PO Clause		
There are no clauses associated with this Purchase Order.		