

HokieMart Approver Guide





HokieMart Approver Guide

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Introduction

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

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

Roles in HokieMart

Requestor – an individual 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 individual who initiates the **electronic** purchase of goods and services "on behalf of" the **Requestor** who is authorized to use HokieMart.

Approver – individual designated to **electronically** review/edit and approve purchase requisitions and invoice documents within the delegated purchasing authority. After verification, the Approver may either reject part/all of the document or approve the document. This role approves two types of documents: Requisitions and Invoices. Approval of the requisition creates a Purchase Order (PO) that is electronically delivered to the supplier. Approval of an Invoice provides Accounts Payable with approval to generate payment once the document completes workflow and integrates in to Banner.

Receiver – an individual who **electronically** receives goods and services. The **Receiver** verifies receipt of goods/services. All or part of the order may be received depending on delivery (backorders, damaged goods, etc.). After HokieMart interfaces with Banner, a Banner PO number is created by the system. Typically, a single user may also serve as both a **Requestor** and **Receiver**. HokieMart provides a central receipt of invoice 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**.

Additional HokieMart material may be found on the Purchasing website: <u>https://www.procurement.vt.edu/hokiemart.html</u>

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:

Platform	Browser Support
Windows	Internet Explorer (IE) – Only Version 11* Edge – latest version with Windows 10 Chrome – latest version – automatically updated by Google Firefox – latest version – automatically updated by Mozilla
Macintosh	Safari 4.0 and higher Firefox – latest version – automatically updated by Mozilla
iPad	Safari – embedded browser within the iPad

*Previous versions of Internet Explorer are no longer supported. Users will be redirected to a page displaying recommended browsers.

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.

Navigation

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



Searching for a Document

Approvers will have the ability to search for documents, such as requisitions, purchase orders, and invoices, using their unique numbers.

From the Home Page of HokieMart, type in the document number that you would like to view

Select the 🥰 symbol									
	Requisitions 🔻	167980783	٩	0.00 USD 📜	♥ №				
: Non-Catalog Item	Favorites Shop C	Quick Order Brow	se: Supplier	rs Categories Co	ntracts Cł				

The entire document will be visible

A Home	VIRGINIA HONE MA	ART .						Requisitions	Search (Alt+Q)	Q. 0.00 USD 🗮	v 🕫
) Shop	Requisition • 1679	80783							≡ ⊕ ⊕	… 1 of 1 R	iesulte 👻 <
Ordera	Summary Comments	Attachments History									
Contracts	General		Shipping			Billing		•	c	ompleted	
Accounts Payable	Status	Completed (2/24/2023 11:32 AM)	Ship To			Bill To		Total	(59.99 USD)		
Suppliers	Submitted	2/24/2023 11:31 AM	Contact Name Danielle Phone +1 540-231-854 Email danielleh@vt.edu	Harlow 8		Accounts Payable Email to: vtinvoices@vt.edu Or Mail To:		Purc	ase Order: P4225620		e
Sourcing	Cart Name Priority	Amazon webcam for Benny Normal	Procurement North End Center Ste 2 300 Turner St NW	100		North End Center Suite 3300 300 Turner Street NW Mail Code 0312		What	e: E0774907		
II. Reporting	Leave date blank unless next fiscal year order (the	no value	Blacksburg, VA 24061 United States			Blacksburg, VA 24051 United States		Work	low		6 e
Administer	enter 07/01/2023)	Oppielle Madeur	Delivery Options					0	Show skipped steps		
Setup	Prepared for	Danielle Harlow	Ship Via	Best Carrier-Sp A Ship Via for this	ecial, See Comments s supplier is unsupported and will not be sent.			6	Submitted 2/24/2023 11:31 AM Danielle Harlow		
	Work Order Number	N/A N/A	Send to Supplier?	HokieMart Will HokieMart will dis	Deliver tribute the PO to supplier			6	Budget Auth		
	Service Now No.	no value	Notify AP-Prepayment	×					✓ System		
	Funding								Org Approval 1 Approved Mary Helmick		
	Chart	Fund	OrgWF1	Account	UGType	Location	Activity		Budget Auth_2		
	U University Chart	121715 Procurement Operation	047000 Procurement	13120 Office Supplies - Gen.	NA Not Applicable	no value	no value	0	Completed System		
	Internal Notes and At	tachments			External Notes and Attachments				Create PO Completed		
	Internal Note	webcam for Benny's office			Note to all Suppliers	no value A Notes for this supplier are unsupported an	d will not be sent.		Completed		

Follow the same steps as above to view a PO. Change the drop-down options to Purchase Order then type in the desired PO number and search.

Purchase Orders 🔻	P4225620	۵	0.00 USD 📜	Q	22
	\equiv	• 🖶 🛛	•••• 1 of 1 Result	ts 🔻	

User Profile/ Notification Preferences

Each HokieMart Approver will have a "personalized" profile which must be created prior to performing HokieMart functions. Your profile is created by General Accounting when you submit your HokieMart Access Request form.

Email Preferences

When a Requisition or Invoice is submitted in HokieMart and awaiting approval, emails can be automatically generated to notify Approvers. By default, certain email notification boxes will be checked. Approvers may choose to check additional email notification boxes to increase the level of individual notification. By placing the cursor over the description, a brief definition will be displayed to assist users in making a decision.

- Select the silhouette icon
- Then select "View My Profile"
- Navigate to the notification preferences section

•	Search (Alt+Q)	0.00 USD	Æ	♡ 13	1372
100	Danielle Harlow				
	View My Profile				
	Dashboards				
	Manage Searches				1
	Manage Search Exports				
_	Set My Home Page				
	Search Help For A Solution				
ncy (Hok	My Recently Completed Requ	isitions			2
	My Recently Completed Purch	ase Orders			2
					Logout

User Profile and Preferences	>	
Default User Settings	>	Prepared By - Cart Assigned Notice 😧
User Roles and Access	>	Prepared Ry - DD line item(c) rejected
Ordering and Approval Settings	>	Prepared by - PR line item(s) rejected
Permission Settings	>	Prepared By - PR rejected/returned 🕄
Notification Preferences	<	Cart Assigned Notice
Administration & Integration		
Shopping, Carts & Requisitions		Receive PR and PO notifications for Carts
Change Request		Assigned to Me
Purchase Orders		PR submitted into Workflow 😌
Catalog Management		PR pending Workflow approval 9
Accounts Payable		
Receipts		PR Workflow Notification available \varTheta
Contracts		PR Workflow complete / PO created 😣
Sourcing Director		
Supplier Management		PR line item(s) rejected
Form Requests		Cart/PR rejected/returned
User History	>	Sourcing Event created from Requisition
Administrative Tasks	>	
		PR created from an awarded Sourcing Event
		Cart created from an awarded Sourcing Event

The notification preferences are categorized by type. Approvers will want to turn on notifications under the Shopping, Carts & Requisitions section, as well as the Accounts Payable section. Select the type (ex. Shopping, Carts & Requisitions) and select the edit section.

Erin Griffin		Notification Preferences: Shopping, Carts & Requisitions		Edit Section ?			
User Name erinc93		The in-application notifications are not yet available for all Email Notifications.					
User Profile and Preferences	>						
Default User Settings	>	Prepared By - Cart Assigned Notice 🤤	None				
User Roles and Access	>		None				
Ordering and Approval Settings	>	Prepared By - PR line item(s) rejected	None				
Permission Settings	>	Prepared By - PR rejected/returned 😧	None				
Notification Preferences	<	Cart Assigned Nation	None				
Administration & Integration							
Shopping, Carts & Requisitions		Receive PR and PO notifications for Carts	None				
Purchase Orders		Assigned to Me 😧					
Catalog Management		PR submitted into Workflow 😧	None				
Accounts Payable		BB ponding Workflow opproval	Notification				
Receipts		FR pending worknow approval	Hormoulon				
Contracts		PR Workflow Notification available 😧	None				

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 the system will send an email to your VT 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).

For requisition notifications, we recommend turning on the **PR pending Workflow Approval** email & notification in the Shopping, Carts & Requisitions section.

For invoice notifications, we recommend turning on the **Invoice pending Workflow approval** email & notification in the Accounts Payable section.

Document Approval Actions

As an Approver, you have the responsibility to review/verify the data on the PR. The Approver is responsible for ensuring that purchases are appropriate university expenditures.

As part of the review process, several actions may be taken, outlined in the sections below.

Managing Documents Awaiting Approval and Assigning the Document

Approvers can work their approvals on a notification basis, or they can view all documents needing their approval in a queue. From the home page of HokieMart select the flag icon for action items.



Click on the category of document, either Requisitions or Invoices, that you wish to approve. This will bring up your queue of requisitions and/or invoices awaiting your approval. If you have any documents that you have already assigned to yourself, you will see those listed as well.

Click on the requisition or invoice number that you wish to review.

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PI
3642050	Cell Signaling Technology Inc 😒	Not Assigned	1
Requisition Name No. of line items	Cell Signaling - 3 line address 1	Folders	141
3625271	MWI Animal Health	Not Assigned	1(
Requisition Name No. of line items	New UX Forms update	Folders	160

The document will open up for your review.

A Home	VIRGINIA UIT - DVLP				All 👻	Search (Alt+Q	۹	1.00 USD 📜 🤇	⊅ <mark>•133</mark>	_
📜 Shop	Invoice • UPS • E90	00370D	۲	ð	Assi	gn 🔹 1 of 20 Resu	lts 🔻 <	>		
Crders	Summary Matching	g Supplier Messages Comments	Attachments 1	History						
Scontracts	A The invoice contains one	or more non-PO invoice lines. They are excluded from t	the matching.						?	⊬
Accounts Payable	General		Addresses		Note/A	ttachments			v	
Suppliers	Invoice Information		Remit To		External	Note	no value			
Sourcing	Invoice Type Inv	roice	PO Box 809488 Chicago, Illinois 60680		Internal	Note	no value			
Reporting	Pay Status In	Process	United States Address Id Vendor Payment Add	rase 10	External	Attachments				
	Invoice Number E9	00370D	Bill To		Interna	Attachments		Date		
Administer	Supplier Invoice No. V7	X221234	no address		<u>↓</u> UPS	221234		6/12/2024		
Setup	Supplier Name UP	2S								
	General Information									
	Invoice Name No	on-PO Payment Request								
	Invoiced By Eri	in Griffin								
	Match Status Un	matched								
	Invoice Owner Eri	in Griffin								
	Invoice Source Fo	rm Request								
	Terms Ne	nt 30 (0% 0, Net 30)	Payment Information		Discou	nt, Tax, Shipp	ing & Handlin	9		
	Contains substituted		F.O.B. Destina	tion-FRT Included in Cost	Discoun	t, tax, shipping	& handling			
	item(s)	20.000	Payment Method Unknow	vn	Alloca	ation	Weighted			
	Terms Discount 0.0	10 USD	Payment Record No. no value	8				Header	r-level	
	Customer Account V7 Number	8221	Payment Record Date no value	0	Di	scount		0.00	0 USD	
	Authorized Payment C1	inht - Outbound Heavy Haul			Та	ix 1		0.00	0 USD	
	Category	ight outcome income theme			Та	ix 2		0.00	0 USD	
Q Menu Search	Enclosure no	value			Sh	hipping		0.00	0 USD	

Select "Assign to myself" on the top right hand corner of requisition or invoice you wish to review. This will assign the requisition in to your personal approval queue. This is important especially for departments with multiple approvers.



Reviewing a Requisition

Approvers are responsible for reviewing requisitions to ensure the appropriateness of organizational funding, correct account codes, and accurate shipping information for department purchases of goods and services. By approving a requisition, the Approver confirms the validity of the purchase.

Throughout the document, to edit, select the pencil icon

Once assigned, the Approver must review and, if applicable, edit the document. The document cannot proceed through the workflow process until the "Review" is done. The areas that can be edited are in the sections that follow.

General Information

In this section of the review, Approvers can update the following fields of General information:

Edit General		×
General		
Status	😋 Pending Org Approval 1 (Danielle Harlow)	
Submitted	3/24/2023 8:48 AM	
Cart Name *	2023-03-24 danielleh 02	
Priority	Normal	~
Leave date blank unless next fiscal year order (then enter 07/01/2009)	mm/dd/yyyy	
Prepared by	Danielle Harlow	
Prepared for	Danielle Harlow	
Work Order Number 🕇	N/A	لا
★ Required fields	Save	Close

Cart Name: The system will automatically assign a name for the Cart unless users choose a unique name.

Priority: Approvers can modify the "priority" of the order. This should be left at "normal" unless the PO is above department delegation and a timesensitive or urgent purchase.

Accounting Date: This field should be left blank unless you wish to use funds from a future fiscal year. If using funds from the next fiscal year, enter 07/01/ and the year.

Shipping Information

The "Ship To" is the location where materials will be delivered. The Requestor designates a "Ship To" address at the time the requisition is prepared.

As the approver you will need to review the information and ensure it's the proper ship to contact and Virginia Tech ship to location. To edit this section, click on the pencil icon in the Shipping block.

The Send to Supplier field indicates if the HokieMart system to automatically send a copy of the purchase order to the vendor upon completion of the requisition through the approval workflow. HokieMart will deliver indicates the system will send the purchase order to the vendor. User Will Deliver indicates that the system will not send the purchase order to the vendor.

Approvers can then edit the contact information, change the shipping address, send to supplier method or indicate if a prepayment is required.

Edit Shipping			×
Ship To 🔺			
CURRENT ADDRESS			Ċ
Contact Name 🕇	Danielle Harlow	Add to my addresses	
Phone	+1 540-231-8548		
Email *	danielleh@vt.edu		
Address Line 1	Procurement		
Address Line 2	North End Center		
City	Blacksburg		
State	VA		
Zip Code	24061		
Country	United States		
O default, +1 540-2	31-8548, danielleh@vt.edu, Proci	rement, North End Center, Blacksburg, VA 24061, United States	*
Search additional	Q Results Per Pag	e 10 🗸	
Delivery Options			
Ship Via		Best Carrier-Special, See Comments	
		▲ Ship Via for this supplier is unsupported and will not be sent.	
Send to Supplier? *		SciQuest Will Deliver	
Notify AP-Prepayment			

Bill To Adress

The "Bill To" address will be Accounts Payable in the Controller's Office. This address should not be edited.

Purchase Order Funding

As the approver you will need to review the funding information closely to ensure accurate fund, org, and account codes are being used.

Funding							<i>ب</i> ۲
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	

To edit the funding information, select the pencil icon

After the updates are made select "save" to apply changes.

A comprehensive list of university account codes may be viewed here: <u>https://www.controller.vt.edu/accountcodes.html</u>

Reviewing an Invoice

Similar to Requisitions, the Approver should review all invoices in their queue for appropriateness of organizational funding and correct account codes for the transaction. Approvers should also ensure timeliness of payment by providing a quality control review of the date the invoice was received by the department and the date the invoice was submitted as a Payment Request in HokieMart.

Invoices needing approval are those that are generated by a Payment Request Form. These are forms designed to process a payment for pre-established transaction types. For more detailed information on Payment Request Forms, please view the <u>Payment Forms User Guide</u>.

The invoice approval process will mirror the purchase requisition approval workflow process. In order to maintain appropriate internal control, the approver must be different than the requestor. The Controller's Office will conduct a quarterly review to ensure compliance.

Once assigned, the Approver must review and, if applicable, edit the document. The document cannot proceed through the workflow process until the "Review" is done. An explanation of the information available on an invoice document is outlined below.

General Section

The General Section on invoices is broken in to three subsections: Invoice Information, General Information, and Dates Information.

General

Invoice Information		Here, Approvers can see information such as who the supplier is that we are paying, what the
Invoice Type	Invoice	supplier's invoice number is, and what our intern HokieMart invoice number is.
Pay Status	In Process	The Invoice number always starts with an E and
Invoice Number	E900370D	ends with a D. This is the number users can use to pull up the invoice in the HokieMart and Banner systems.
Supplier Invoice No.	V7X221234	Systems.
Supplier Name	UPS	

General Information

Invoice Name	Non-PO Payment Request	The General Information is the next subsection.
Invoiced By	Erin Griffin	
Match Status	Unmatched	This subsection tells the Approver information such as
Invoice Owner	Erin Griffin	the Requestor who entered the invoice (Invoice Owner),
Invoice Source	Form Request	Form, and the payment terms of the supplier.
Terms	Net 30 (0% 0, Net 30)	
Contains substituted item(s)	×	Additionally, you can see information that the Requestor
Terms Discount	0.00 USD	entered on the Payment Request Form. The Approver should review the Customer Account Number,
Customer Account Number	V7X221	Authorized Payment Category, and Enclosure if applicable.
Authorized Payment Category	C1 Freight – Outbound Heavy Haul	
Enclosure	no value	
Dates Informatio	n	The final subsection under the General Section is the Dates
Accounting Date	6/12/2024	Information.
Invoice Date	6/8/2024	
Discount Date	no value	Here, Approvers will see dates such as the date the invoice was received by the department and the due date calculated based
Due Date	7/8/2024	on the payment terms.
Invoice Received Date (mm/dd/yyy	06/08/2024 /y)	Approvers should review the Invoice Received Date to verify
Service Start Date (mm/dd/yyyy)	e no value	that the invoice was submitted in to HokieMart for payment promptly upon receipt from the vendor.
Service End Date, Goods Receipt Da (mm/dd/yyyy)	/ 06/08/2024 ate	

Note/Attachments Section

Note/Attachments

External Note	no value		The Note/Attachments section pulls in the invoice and
Internal Note	no value		any payment backup information that the Requisitioner attached on the Payment Request Form.
External Attachments			
Internal Attachmen	ts	Date	
<u>↓</u> UPS 221234		6/12/2024	
			Payment Information Section

Payment Information

F ayment morna	aton	Once an e-invoice routes for approval and i		
F.O.B.	Destination-FRT Included in Cost	completed, the document will integrate with Banner Finance.		
Payment Method	Unknown	The Payment Information section on each e- invoice in HokieMart will show payment		
Payment Record No.	no value	information once a disbursement is made in Banner Finance.		
Payment Record Date	no value	Codes Section		

Funding information will display under the Codes Section. Approvers should thoroughly review this information to ensure appropriate funding and account codes are applied to this payment.

Codes							v
LINE							
Chart	Fund	OrgWF1	Account	UGType	Location	Activity	
U University Chart	121715 Procurement Operation	047000 Procurement	12130 Messenger Services	NA Not Applicable	no value	no value	

Line Item Details

The final section on an invoice will show the Approver more detailed information on the description and total cost of this payment.

11	.ine								•
<no< td=""><td>PO Nur</td><td>nber></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></no<>	PO Nur	nber>							
	Status	P0 Line	Item	Catalog No.	Size/ Packaging	Unit Price	Quantity	Ext. Price	
1	G		Payment for invoice V7X221234, account V7X221, dated 6/8/24. Charges for shipment of equipment to Jin-Hee Cho in Falls Church, VA. Check Request: Non-PO Payment Request		EA	10.38	Qty: 1 EA	10.38	
	V ITEM	DETAILS	>						

Returning the Document

As an Approver there may be times that you will need to return the requisition back to the requisitioner to make changes. Please note, the return function is only available on a Requisition Document and is not an action that can be taken on an Invoice awaiting approval.



From the drop-down action items select "Return to Requisitioner"

**Please note, the requisition must be assigned to the approver to have this action as an option.

- 1	Return To Requisitioner	×	le
	expand	l clear	
	Characters beyond the limit are not saved, i.e., the note is truncated. Once to note is attached, it is accessible from the History tab of the document.	he	
- 1	Save Changes Car	ncel	

This will allow you to include a comment explaining why you are returning the requisition.

When done, select "Save Changes" to complete the action.

Rejecting a Document

Should you need to reject a requisition or invoice entirely, this action can be done. However, the document will no longer be salvageable to the requisitioner, and it will remain permanently rejected. This means that if re-entry is needed to ensure a purchase order is issued or a payment is completed, the Requisitioner will need to re-enter the requisition or Payment Request Form from scratch.



A comment box will open which allows the Approver to add specific notes about the rejection. The note can be seen in the PO history.

Adding a Comment

Adding Comments to a Document

Approvers have the ability to add comments to a Requisition, Invoice, or Purchase Order. 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 a HokieMart user to submit a receipt
- To add an attachment
- To add internal information to a transaction after the document has completed workflow

To add a comment: Select the Comments tab Purchase Order • P3988571 Revision 0 • Revisions 1 Confirmations Status Summary 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		

We recommend leaving this set to All.

To add a new comment, select the "+" symbol



When satisfied with the comment select the check mark symbol

Records found: 1	Show comments for	All	+
Danielle Harlow - 12/6/2021 3:44:49 PM	Purchase Or	der - P3988571 Comment Added	5
Please see attachment DH Email sent: Danielle Harlow -danielleh@vt.edu>			

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

**Please note, comments cannot be deleted or edited once posted to the document. Anyone with access to view this document in HokieMart can see the comments.

Approval Workflow and History of the Document

History Tab

This tab provides the entire history of the document process from creation and the individual steps in the process.

An Approver can view the approval steps and any history pertaining to the requisition or invoice by selecting the "History" tab.

VZ7 ¥	IRGINIA ECH. HOKIE M.	ART						Procure	ment Requests 💌
Requ	uisition • 1679	80783							
Sur	nmary Comments	Attachments	History						
S	tart date	End date		✓ Action	User	(Requisition	✓ Document	.t type
F	ilter Clear All Fi	Iters							Export CSV
1-1	6 of 16 Results								20 Per Page 🖪
Line I	No Date/Time ↓	User	Step(s)	Action		Field Name	From	То	Note
	2/24/2023 11:32:51 AM	System		Requisition approval process con	npleted				
	2/24/2023 11:32:51 AM	System	Create PO	PO Created		PO#: 139866886			
	2/24/2023 11:32:46 AM	System	Budget Auth_2	Requisition approved					
	2/24/2023 11:32:34 AM	Mary Helmick	Org Approval 1	Requisition approved					
	2/24/2023 11:32:32 AM	Mary Helmick	Org Approval 1	Requisition assigned					
	2/24/2023 11:31:44 AM	System	Budget Auth	Requisition approved					
	2/24/2023 11:31:34 AM	Danielle Harlow		Requisition submitted					
	2/24/2023 11:31:24 AM	Danielle Harlow		Requisition modified		FundWF	empty	121715	
	2/24/2023 11:31:24 AM	Danielle Harlow		Requisition modified		OrgWF2	empty	047000	
	2/24/2023 11:31:24 AM	Danielle Harlow		Requisition modified		UGType	empty	NA	

Workflow

The workflow is listed on the right hand side of each document with in the HokieMart system. The workflow lists all of the approval stages before the requisition is completed and turned into a PO or the invoice is integrated in to Banner for payment. The workflow provides transparency so that document viewers can see the real time progress of a given purchase requisition or invoice.

Below is an example of a Requisition workflow.

Completed	
Total (59.99 USD)	>
Related Documents	~
Purchase Order: P4225620	0
Invoice: E0774907	•
What's next?	~
Workflow	Ľ 🖶
Show skipped steps	
Submitted 2/24/2023 11:31 AM Danielle Harlow	
Sudget Auth Completed V System	
Org Approval 1 Approved Mary Helmick	
Completed	
Create PO Completed	
Completed 2/24/2023 11:32 AM	

Other Actions

There are additional steps that may be taken from the drop-down menu.

If you have chosen "Assign" to place a requisition or invoice in your Approvals folder, you must take action on the document. You do, however, have the ability to take alternative actions.



Return to Shared Folder - places the document back into the organization folder. This will release you from the approver responsibility and allow another approver to assign the requisition.

Place on Hold - there may be times that you wish to delay action. By using this option, it will not require any action until you change the date.

Forward to - this will forward the document to another assigned Approver. If this option is selected, you will be able to choose another Approver to assume responsibility for approving the requisition or invoice.

General Contact Information

HokieMart	Questions concerning HokieMart functions (rejected/pending PRs and POs), appropriate form usage and procedures, vendor receipt of orders: <u>HokieMart@vt.edu</u>
Accounts Payable	Questions concerning the payment of invoices, encumbrances, and expenditures: Accounts Payable acctpay@vt.edu
Fixed Assets	Questions regarding fixed assets, please contact VTFixedAssets@VT.edu
Receiving	Questions concerning electronic receiving: Accounts Payable acctpay@vt.edu
Banner Reports	Questions concerning Banner Finance Reports: General Accounting <u>genactg@vt.edu</u>
HokieMart Access	Questions concerning updating or adding roles (Receiver, Requestor, Approver) or access to funding: General Accounting genactg@vt.edu

Helpful links/Websites

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

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