Virginia Tech
Electronic Business System

HokieMart

Approver User Guide

November 8, 2010
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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. This system, 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

Users in HokieMart

Requestor – 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 - 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 within the delegated purchasing authority. After verification, the Approver may either reject part/all of the PR or approve the PR. Approval of the PR creates a Purchase Order (PO) that is electronically delivered to the supplier.

Receiver – individual who electronically receives the 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: http://www.purch.vt.edu.
Contact Information

**HokieMart**
Questions concerning HokieMart functions (rejected/pending PRs/POs), appropriate form usage and procedures, vendor receipt of orders:
HokieMart@vt.edu, 540-231-2020

**Accounts Payable**
Questions concerning the payment of invoices, encumbrances, expenditures:
Julie Rosenberger at Julie.zurfluh@vt.edu, 540-231-2544

**Receiving/Invoice Imaging**
Questions concerning electronic receiving and invoice images:
Mike Long at milong@vt.edu, 540-231-9308

**Banner Reports**
Questions concerning Banner Finance reports:
Penny Falck at plfalck@vt.edu, 540-231-9260
Tara Jones at taraj@vt.edu, 540-231-8564

**Direct Pay**
Questions concerning the use of Direct Pay Form and payment categories: Donna Nichols at dnichols@vt.edu, 540-231-8616

**HokieMart Roles**
Questions concerning updating/adding HokieMart roles (Requestor, Receiver, Approver): Penny Falck at plfalck@vt.edu, 540-231-9260

**International Tax Payments**
(US Non-Resident): Janet Kunz at jakunz@vt.edu, 540-231-3754

**Wire Transfers**
Questions concerning wire transfers: LaTawnya Burleson, latawnya@vt.edu, 540-231-0678

**Updated HokieMart Information**

Issues of the HokieMart Newsletter, The Cart, may be found at:
http://www.purch.vt.edu/HokieMart/cart/cart.html

Issues of the HokieMart Bulletin Upgrades may be found at: http://www.purch.vt.edu/ under the tab labeled Announcements on the right.

Current HokieMart User Guides may be found at:
http://www.purch.vt.edu/HokieMart/ug.html
Browser Requirements and Settings

HokieMart is a web-based product and is used in conjunction with the Internet. Currently, Virginia Tech supports Internet Explorer and Netscape as preferred web browsers. You may access HokieMart from either a PC or Mac.

This example is for Internet Explorer web browser. For assistance with other browsers, contact your departmental Information Technology technician.

Trusted Site for SciQuest

For all features to function fully in SciQuest, HokieMart users need to make SciQuest a trusted site.

From the Browser Menu Bar:

- Select Tools
- Internet Options
- Security
- Trusted Sites
- Sites

Enter https://www.sciquest.com in the field as shown.

- Click “OK” to close the box.
- Click “OK” to close the Tools box.
Information Panel

On the Home Page, to the left, is a section displaying information as it pertains to the organization (Virginia Tech).

**HokieMart Message** - this section will display news and messages intended for all university users. These messages remind users of up-coming events, announce new contracts, and other pertinent information. **System Messages** - a method of communicating information pertaining to HokieMart. These messages will be posted by a system administrator.

**Review** - status of HokieMart activity by user in various areas. Each area will display particular information about areas of interest.

**Requisition Approvals** – An Approver may click on “Approvals” for access to their PRs to be approved.

**My Resources** - provide users with a quick reference to the HokieMart Help Desk. By clicking on the email link, an email notification will be sent to the Help Desk. Users may also contact the Help Line by phoning 540-231-2020.
Creating and Managing User Profile

Each HokieMart Approver will have a “personalized” profile which must be created prior to performing HokieMart functions.

Production URL – [http://www.hokiemart.vt.edu](http://www.hokiemart.vt.edu)

- Log into HokieMart using Production URL.

- Enter your PID (same user name for Banner application).

- Enter your Password (same password used to log into Hokie Spa, MyVT, or Banner leave system).

- Click “Login.”
Email Preferences

When a Purchase Requisition (PR) is generated in HokieMart, 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.

- Click “Profile.”
- Click “Email Preferences.”
- Place a check mark in the desired boxes. Both boxes must be checked.
- Click “Save.”
Changing Your Password

If you wish to change your PID password:

- **Proceed to URL:**
- **Select the “Change Your PID Password” option.**
Time-Out Sessions

The HokieMart will “time out” after one hour. If a user has not been “active” in the application during that time period, the application will become inactive. Before any further action can be taken, the user must login again by clicking on “login again.”

OR by using the main login screen.

Important: Each Punchout has a time-out period. These, however, are determined by the various suppliers.
Purchase Requisition Actions

As an Approver, you have the responsibility to review/verify the data on the PR. The Approver or substitute is responsible for ensuring that purchases are appropriate university expenditures. As part of the review process, several actions may be taken:

Assigning the PR
Reviewing/Editing the PR
    General
    Ship To Address
    Bill To Address
    Purchase Order Funding
    Split Individual Line Items of PR
    Organization Number
    Adjusting the Quantity
    Assigning a Substitute

Approving a PR
Rejecting a PR
Adding Comments to a PR or PO
Adding Documentation

Assigning the PR

From the Home Page of HokieMart:

- Click the “approvals” tab.
  A list of PR’s awaiting action will appear.

- Click “Assign” for each of the PRs you wish to approve/reject.
- Click “Go.”
  The PR will now move to “My PR Approvals.”

- Click the PR Number.
The entire requisition (“Summary Requisition”) will appear.
Reviewing/Editing the PR

At this point the Approver must review and, if desired, edit the PR. The PR cannot proceed to the approval process until the “Review” is done. The areas that can be edited are:

**General**

In this section of “Review,” Approvers can update some of the General information:

- Click “edit.”
- Make desired updates
- Click “save.”

**Status:** shows the step of the PR in the workflow process (cannot be edited).

**Submitted:** displays the date the PR was submitted by the Requestor (cannot be edited).

**Cart Name:** the system-assigned name for the Cart. Unless users choose a unique name, the Cart will have the system name (Cart date prepared and Requestor who prepared the PR). Approvers can change the Cart Name if desired.

**Priority:** Approvers can modify the “Priority” of the order. Typically, the “Priority” will be normal.

**Accounting Date:** will not display, unless it has been “future dated” during the PR process. This field should NOT be used except at the end of each fiscal year.

**Prepared by:** the individual who prepared the PR (cannot be edited).

**Prepared for:** the name of the individual for whom the On-Behalf-of Requestor prepared the requisition. This is only visible if the PR was submitted on behalf of another user (cannot be edited).
Ship To Address

The “Ship To” is the location where materials will be delivered. The Requestor designates a “Ship To” address at the time the PR is prepared.

If you created additional addresses in your profile, you can modify the “Ship To” address.

From the drop-down menu,
- Click “edit” if you wish to update this address.
- Select the desired address code.
- Click “Save.”

Bill To Address

The “Bill To” address will be Accounts Payable in the Controller’s Office. HokieMart generated invoices will be centrally received by the Controller’s Office.

This address may not be edited.
**Purchase Order Funding**

**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 “Funding” tab.
  A Funding box will open.

- Click “Edit.”

- Click “add split.”
- Choose desired method of splitting the PR.

- Enter desired amount of the split.
- Click “recalculate/validate values.”
- Click “Save.”

Amount of price should be split as desired.
Line Item Level

In an active cart:

- Click the “Funding” tab.
- Scroll down to Supplier/Line Item Details.

- Click “Ext. Price” box by the line item that you wish to split.
- Click “Edit.”
- Click “add split” (once for each additional split).

From the drop-down menu:

- Select “Amount of Price.”
- Enter dollar amounts/account codes/fund codes as needed.

- Click “recalculate/validate values.”
User will receive an error message if the amounts do not equal the total.

Correct the error and

- Click “recalculate/validate values.”
- Click “Save.”

This message will appear next to each item that is split:

**Accounting Codes**

(values have been overridden for this line)

<table>
<thead>
<tr>
<th>Chart</th>
<th>Fund</th>
<th>Org/Inv</th>
<th>Account</th>
<th>Location</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>U</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Select from profile values...</td>
<td>Select from all values...</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Organization Number**

The organization code that is linked to a particular fund will be displayed on the PR.

**Fund Code**

If you have not selected funds in your profile, you may manually enter the fund number.

If you choose to change/enter the fund, you will also need to:

- Click “recalculate/validate values.” The correct organization will populate.
- Click “Save.”

**Account Code**

The account code may also be changed. If account codes have been stored in your profile, you may select them from the drop-down list. If not, they may be entered manually. The procedure for changing the account code is the same for changing the fund number.

After adjusting any of the values in the fields:

- Click “recalculate/validate values.”
- Click “Save.”

University account codes may be viewed by selecting this URL:

http://www.co.vt.edu/procedures/Account_Descriptions_0306.pdf
Adjusting the Quantity

Approvers also have the ability to adjust the number of items on a PR.

- Click “Assign.”
- Click “Go.”
- Click “PR number.”

The entire PR will be displayed.

- Select the item to be changed by placing a check mark in the radio box next to the item.
- Click “edit.”

Internal and External Note boxes will open to allow the Approver to add notes about the quantity change.

- Change the quantity if desired.
- Click “Save.”

If the quantity is adjusted, after selecting “Save,” the Ext. Price (extended price) will reflect the change.
Assigning a Substitute

As an Approver there may be times that you will need to assign a substitute to approve PRs. This substitute will perform Approver functions until he/she is no longer designated as a substitute. You may assign anyone as a substitute but that individual will also need to be an Approver.

Above “My PR Approvals: “

- Click “Assign Substitute.”

- Enter the last name of the person you wish to assign as the substitute.
- Click “Search.”

A list of matches will be displayed.

- Choose the desired user.
- Click the radio circle to select the desired Approver as your substitute.
- Click “Choose Selected User.” This individual will now be assigned as your substitute.
- Click “End Substitution” when you want to remove this user as a substitute.

If you temporarily designate a substitute, you will also need to remove them as a substitute.

While the substitution is in effect, both the original Approver and the substitute can approve transactions.
Approving a PR

Approvers should receive an automatic email informing them of a pending transaction. Approvers must have their email preferences set up to receive the automatic emails.

- Click “approvals” tab.

- Click “Assign” to assign PR for Approver action. If the Approver does not wish to act on the PR at the present time:
  - Click “Assign.”
  - Click “Go.”
  The PR will remain assigned to the current Approver.

To complete the Approval of the PR:

- Click the PR number.

Transaction will move to “My PR Approvals” folder.

The detailed PR will appear. View details (items, quantities, funding, etc.). Make any necessary updates/changes.

To approve transaction:

- Click “Approve/Complete Step” in upper right-hand corner of the screen.
- Click “Go.”

Transaction is now approved. PR will become a PO and will be electronically processed in HokieMart.
Rejecting a PR

Approvers should receive an automatic email informing them of a pending transaction. Approvers must have their email preferences set up to receive the automatic emails.

- Click “approvals” tab.
- Click “Assign” to assign PR for Approver action. If the approver does not wish to act on the PR at the present time:
  - Click on “Assign.”
  - Click “Go.”
  The PR will remain assigned to the current Approver.

To complete the rejection of the PR:
- Click PR number.
  Transaction will move to “My PR Approvals” folder.

The detailed PR will appear. View details (items, quantities, funding, etc.). Make any necessary updates/changes.

To reject complete PR or specific line items from the drop-down menu:
- Click “Reject Selected Items.”
- Click “Go.”
  An “Add Note” box will open which allows the Approver to add specific notes about the rejection. The note can be seen in the PO history.
  - Click “Reject Line Item” after adding the notes.

Final step to approve the rejection:
- Click “Approve/Complete Step” in the upper right-hand corner of the screen.
- Click “Go.”
  The PR is now rejected and will not become a PO.
Reject Entire PR at One Time

Approvers have the ability to reject all line items of a PR in one single action. “Reject Requisition” is an option on the “Available Actions” drop-down menu. Selecting “Reject Requisition” will open a pop-up box asking the user to add a comment to the requisition if desired. The note will be added to the PR history.

If you do not wish to add a “PR Reject Reason,” click “Reject Requisition.”

The entire requisition has now be rejected and will not become a PO.
Returning a PR to Requisitioner (Requestor)

An Approver (including administrative approvers) has the ability to return the PR as a draft cart to the Requestor for any changes/updates that need to be made. This function is available AFTER the cart has been assigned to the Approver. Returning a PR allows changes without rejecting the PR.

From the drop-down menu:
- Select “Return to Requisitioner.”
- Click “Go.”

The following box will open.

- Add desired “Reason for return.”
- Click “Return to Requisitioner.”

The Requestor will receive an e-mail notification (Requestor must have “PR Rejected” checked in their Profile.) that the PR has been returned for action.

The “requisition outbox” will now display “Requisition returned.”

The Requestor will make the changes as requested by the Approver and resubmit the revised PR for approval.

If Approver wishes to view the reason for returning the PR:
- Click “History” tab.
Adding Comments to a PR or PO

Requestors and Approvers have the ability to add comments to the purchase requisition (PR) or purchase order (PO). In addition, a comment may be sent to other HokieMart users. 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

“Add Comment” is available in the drop down menu of “Available Actions” on the PR.

To add a comment,
- Select “Add Comment” from the drop down menu.
- Click “Go.”

The “Add Comment” box will open.
- Add the desired comment.
- Place a checkmark in the email notification(s).
- Click “Add Comment.”

By clicking on “add email recipient” other HokieMart users may receive the email notification.

An attachment(s) may also be included in the email. See instructions below.

By clicking the “Comments” tab on the PR, the Approver and Requestor may view all comments associated with this PR.
Adding Documentation

An Approver also has the ability to **add documentation** (Word Files, etc.) when the PR is returned to the Requestor.

- Follow instructions above for adding a Comment.
- Check “Email notification(s).”
- Click “Browse” and attach the desired document.
- Click “Add Comment.”

Requestor and/or other recipients will receive an email.

```
Re: COMMENT ADDED TO REQUISITION #: 318907
Dear Sherry Crunkilton,

Sherry Crunkilton has commented on Requisition 318907
Comment: See Direct Pay Information
Attachment: Direct Pay Information.doc
To reply to this comment click on the following Link
https://userdept.ocquest.com/apps/budget/ReqComments?reqId=318907&authuser=U330104&level=MY_ORDERS_HIST&level2=MY_ORDERS_HIST&reqType=0&reqstatus=10&temp=124029379254
```

To reply to the comment:
- Click the URL in the email.
- Click “Comments.
- Click “Add Comment.”

To open the attachment:
- Click the attachment name.
Approval Workflow and History of the PR

An Approver can view the approval steps and any history pertaining to the PR by selecting either the “Approvals” or “History” tab.

Approvals Tab

This tab provides the workflow of the PR and lists all of the approval stages before the PR is completed.

History Tab

This tab provides the entire history of the PR process from creation by the Requestor and the individual steps in the process. If the PR fails, there will be an error message and the Requestor will need to create a new cart or copy the previous cart and correct the error.
Other PR Actions

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

If you have chosen “Assign” to place a PR in your “My PR Approvals” folder, you must take action on the PR. You do, however, have the ability to take alternative actions.

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

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

- **Forward to** - this will forward the PR to another assigned Approver. If this option is selected, you will be able to choose another Approver to assume responsibility for approving the PR.
  
  - Click “Forward to” from the drop-down menu.
  - Click “Go.”
  - Enter the last name of the individual you wish to forward the PR to.
  - Click “Search.”

  All users matching your query will be displayed.

  - Place a mark in the “radio” circle to choose the desired “Forward to” Approver.
  - Click “Choose Selected User.”

  A box will open to allow the Approver, if desired, to enter note to the individual that the PR is being forwarded to.

  Click “Forward.”

**Add Notes to History** - allows the Approver to add notes that may be important on this PR.

**Copy to New Cart** – an action which can be performed only by a Requestor and an Approver who also has the role of Requestor on the organization/fund.
PR Stages

There are various stages of a PR:

- the PR is pending and is still in the Approval Workflow.

✓ - the PR has been Approved and the Workflow is complete. After approval, the PO is created.

✗ - indicates the PR has been rejected at some point in the Approval Workflow. This may be at the Budget Authorization stage or at the Approval stage.

✓ - indicates the PR has been partially approved/rejected. This would mean that one or more items of a multi-line item PR have been rejected but others have been approved.

↩ - PR has been withdrawn by the Requestor. The Approver will not see these requisitions.

<table>
<thead>
<tr>
<th>Status</th>
<th>Requisition No.</th>
<th>Requisition Name</th>
<th>Requisitioner</th>
<th>Requisition Date/Time</th>
<th>Requisition Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>2972363</td>
<td>2006-10-18 requester04 01</td>
<td>Bird04, Hokie</td>
<td>10/18/2006 2:56 PM</td>
<td>715.00 USD</td>
</tr>
<tr>
<td>✗</td>
<td>2972447</td>
<td>2006-10-18 requester03 01</td>
<td>Bird03, Hokie</td>
<td>10/18/2006 2:55 PM</td>
<td>730.00 USD</td>
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<tr>
<td>✓</td>
<td>2972375</td>
<td>2006-10-18 requester25 01</td>
<td>Bird25, Hokie</td>
<td>10/18/2006 2:55 PM</td>
<td>715.00 USD</td>
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<td>✗</td>
<td>2920936</td>
<td>Office supplies</td>
<td>Bird04, Hokie</td>
<td>10/18/2006 2:48 PM</td>
<td>8.27 USD</td>
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<tr>
<td>✗</td>
<td>2920947</td>
<td>File folder</td>
<td>Bird03, Hokie</td>
<td>10/18/2006 2:48 PM</td>
<td>52.43 USD</td>
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<td>2930072</td>
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<td>Bird03, Hokie</td>
<td>10/18/2006 2:48 PM</td>
<td>13.91 USD</td>
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<td>Bird01, Hokie</td>
<td>10/18/2006 2:48 PM</td>
<td>20.38 USD</td>
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<td>✗</td>
<td>2972120</td>
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<td>Bird23, Hokie</td>
<td>10/18/2006 2:48 PM</td>
<td>15.46 USD</td>
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<td>✗</td>
<td>2972210</td>
<td>2006-10-18 requester02 01</td>
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<td>10/18/2006 2:48 PM</td>
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<td>✗</td>
<td>2972037</td>
<td>Beakers_2</td>
<td>Bird23, Hokie</td>
<td>10/18/2006 2:39 PM</td>
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<td>✗</td>
<td>2971915</td>
<td>Beakers</td>
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<td>892.84 USD</td>
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<td>2006-10-17 requester25 01</td>
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<td>10/17/2006 10:20 AM</td>
<td>200.00 USD</td>
</tr>
<tr>
<td>✗</td>
<td>2961454</td>
<td>2006-10-17 requester02 01</td>
<td>Bird02, Hokie</td>
<td>10/17/2006 10:16 AM</td>
<td>350.00 USD</td>
</tr>
<tr>
<td>✗</td>
<td>2961470</td>
<td>2006-10-17 requester01 01</td>
<td>Bird01, Hokie</td>
<td>10/17/2006 10:16 AM</td>
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<td>✗</td>
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<td>Bird25, Hokie</td>
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<td>10/17/2006 9:59 AM</td>
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</table>
History of Approved PRs

Approvers can view a history of all approved PRs.

To locate the Approver outbox:

- Click “approvals” tab
- Click “Requisition outbox” tab.
- The following box will open. The filter “This Month” is the default.

- Click “Search.”
All PRs which were approved in the present month will appear.

From the drop-down menu, Approvers may also choose to search by:

- Last Month
- Today
- Yesterday
- Manual Filter

To view PRs for an extended period of time:

- Choose “Manual Filter” from the drop-down menu.
- Enter the “Start Date” and “End Date” for the desired date range of the search.
- Click “Search.”

Appraiser can view all PRs for the chosen date range.
Approval Workflow and History of the PO

After a PO has completed the approval process, the Approver, by selecting from either the “PO Approvals” tab or the “History” tab, can view the workflow and the history of the PO.

PO Approvals Tab

This tab provides the workflow of the PO and lists all of the stages as the PO is electronically processed.

History Tab

This tab provides the entire history of the PO from its creation and the delivery method to the supplier.
Searching for a PR or PO

Approvers will have the ability to search for PRs or POs using their unique number. From the Home Page of HokieMart:

- Enter the PR No. that you would like to view.
- Click “Go.”

The entire PR will be visible.

Follow the same steps above to view a PO.

- Enter the PO No. that you would like to view.
- Click “Go.”

The entire PO will be visible.
Searching for PO Receipts

To view details of a specific PO receipt(s), from the Home Page of HokieMart:

- Enter the PO No. on which you would like to view the receipts.
- Click “Go.”
- Click the “Receipts” tab.

The receipt(s) number(s) will appear.
- Click on the “Receipt No.” to view the entire receipt.

- Receiver
- Receipt Date
- Receipt Summary

Receiver:
Sally Trainer 2.
Received on

Both items ordered have been electronically received.