



HokieMart Requestor Guide



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HokieMart Requestor User Guide



Introduction to HokieMart

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

HokieMart is Virginia Tech's e-procurement (purchasing) system designed to provide an effective and efficient purchasing process for the university. HokieMart allows Virginia Tech to:

- secure better pricing for 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 accurate and more timely financial information in conjunction with Banner
- increase the flow of purchase orders to eVA

Overview of HokieMart Process

HokieMart is used to make purchases and issue payments to vendors. This can be accomplished by submitting a requisition or a payment request form. After a requisition or payment request form is submitted, they flow through an approval process to generate a Purchase Order or e-invoice to initiate payment to a vendor.

In order to maintain separation of duties, typically, a single user may serve as both a Requestor and Receiver. Usually, an Approver has only that single role. Users cannot enter, approve, and receive their own documents in the HokieMart system.

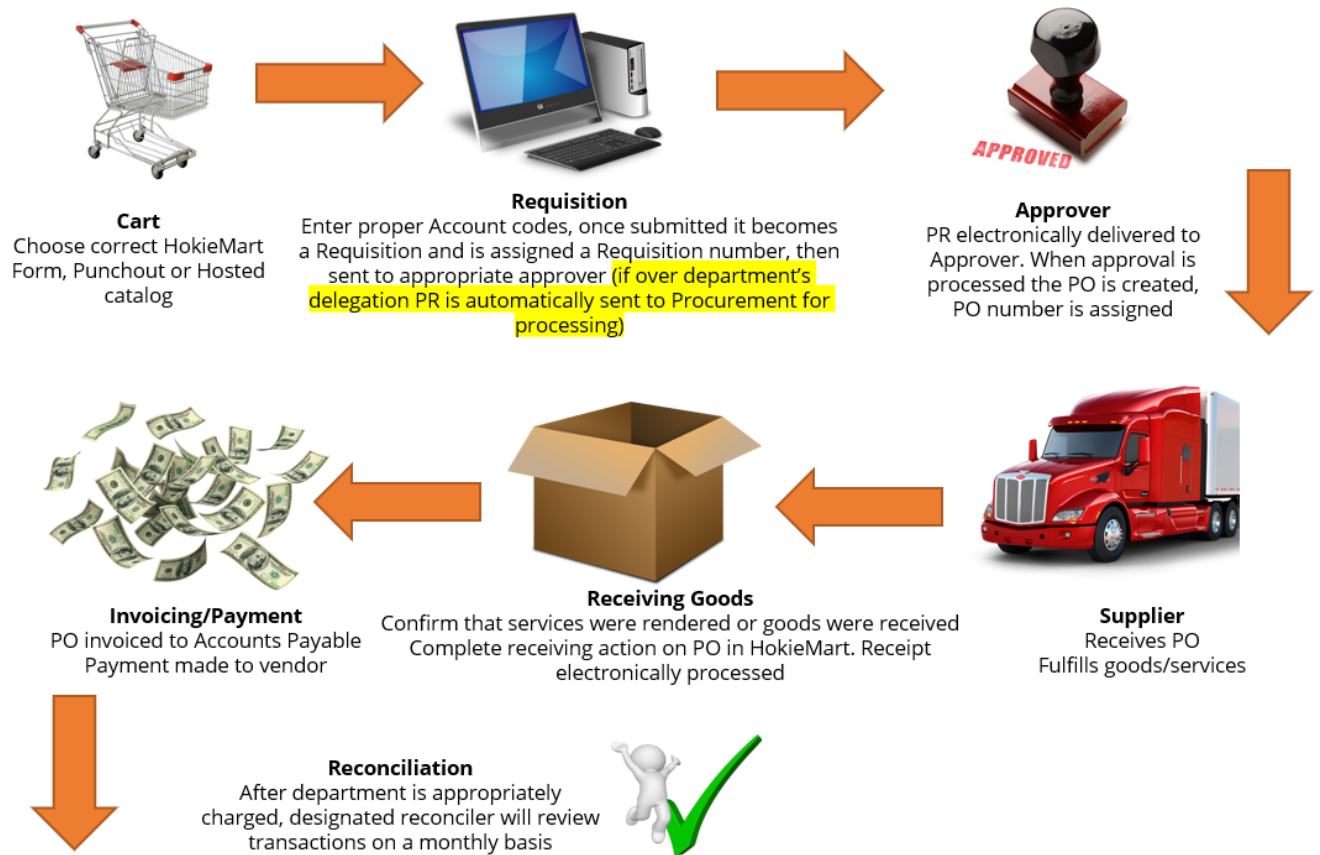
HokieMart provides a central receiving process for the entire university. Once goods or services are delivered, a Receiver will go into the purchase order to complete a receiving action. Along with a copy of the PO and invoice, this receiving action provides Accounts Payable with a 3-way match to issue payment to a vendor.

More information regarding receiving can be found in the [Receiver Guide](#).

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:

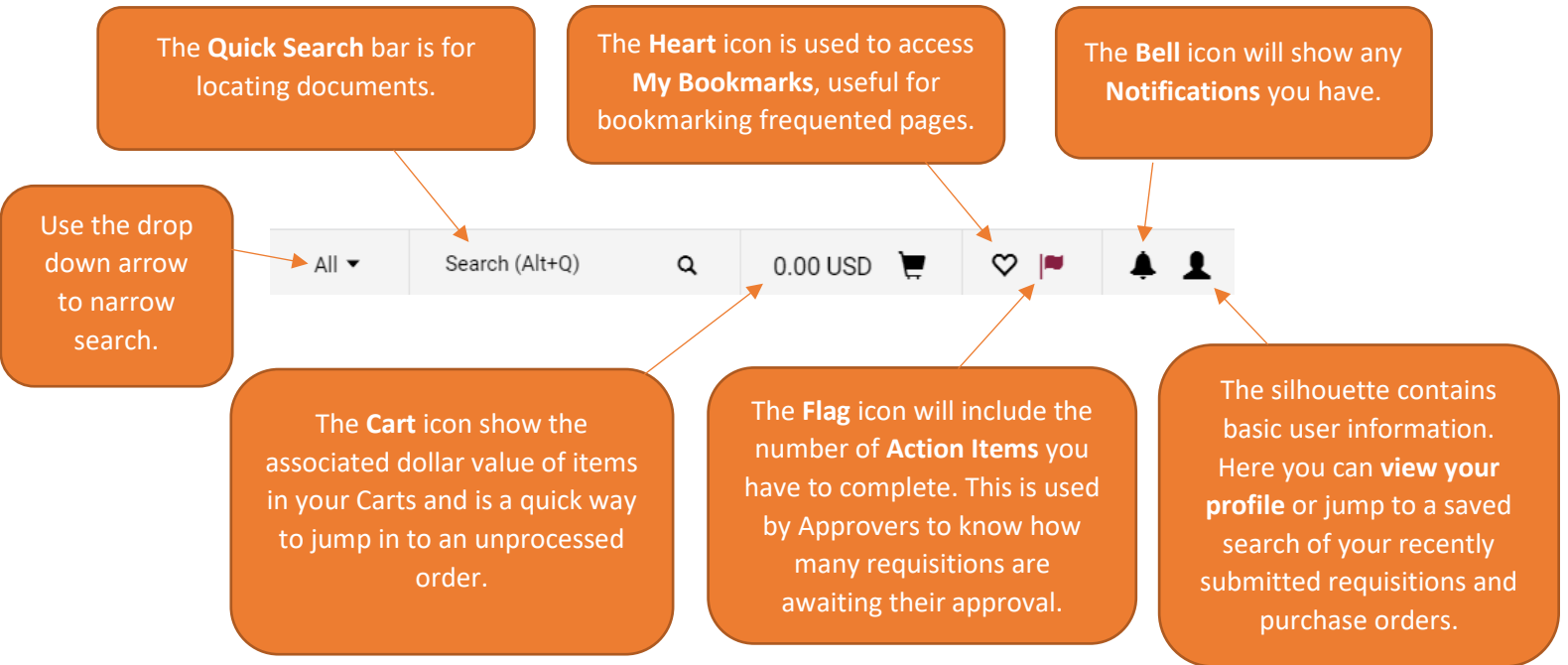
- Requestor
- Approver
- Receiver

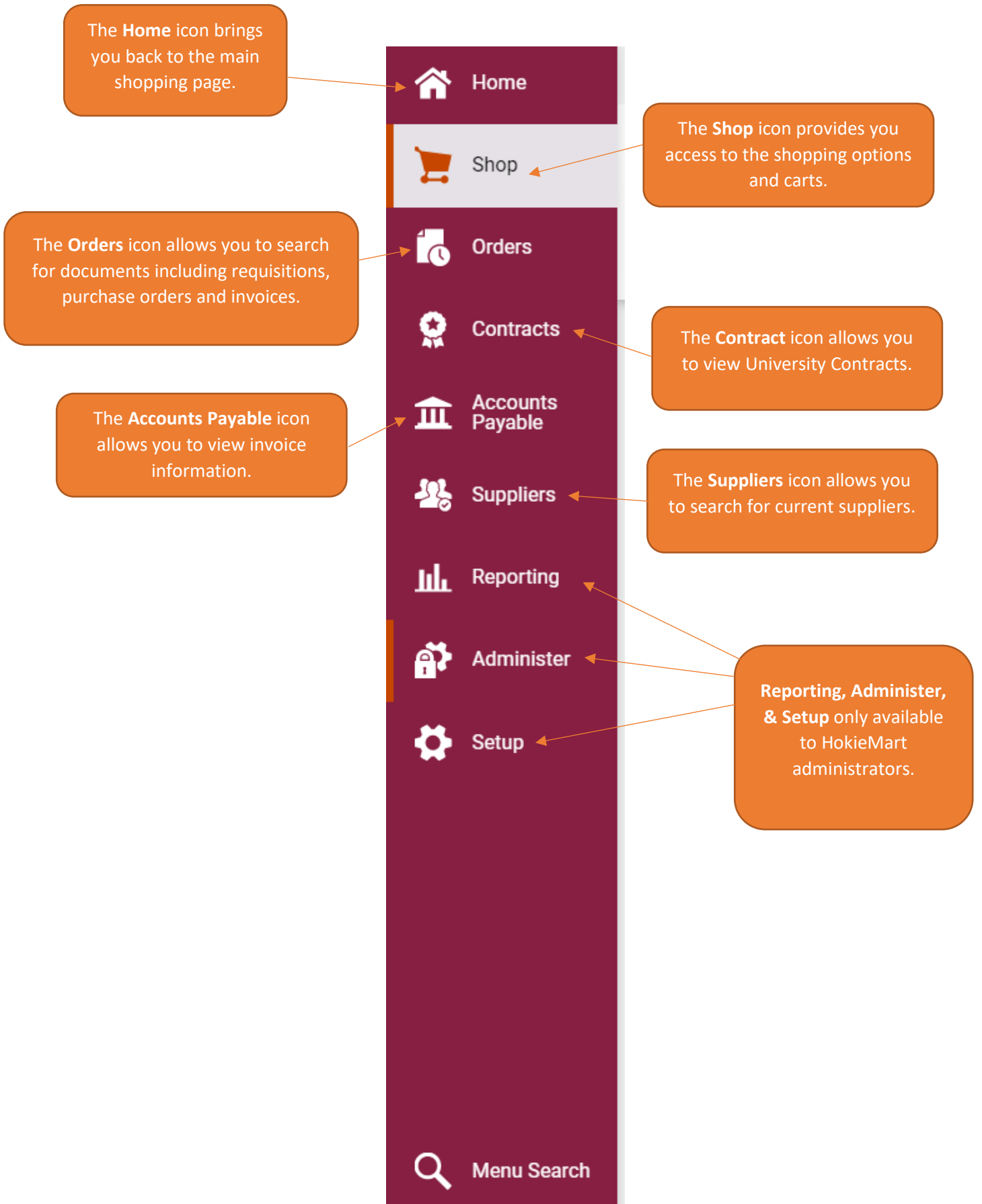
HokieMart Workflow



Navigation

There are various icons along the top of HokieMart that help users work efficiently in the system.



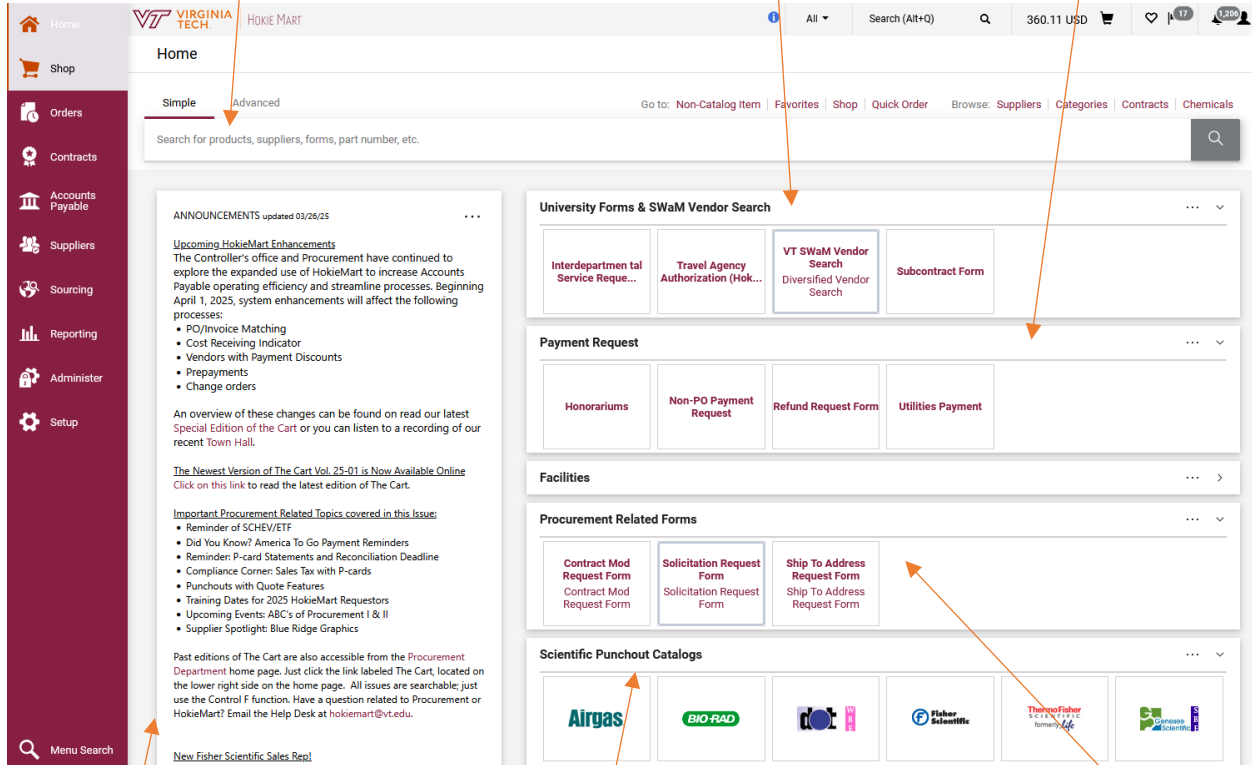


Shopping Home Page

The Simple Search Tool can be used to search for products, suppliers, forms and part numbers, etc.

University Forms contain several forms used to issue purchase orders for specific transaction types. It also includes our VT Vendor Search tool

Payment Request contains four forms that can be used to pay invoices for transactions that qualify as procurement exemptions.



The Organization Message displays announcements from Procurement.

The Featured Suppliers Shows tiles of contracted vendors with Punchout and Hosted catalogs.

The Procurement Related Forms provide a way for campus to request informational changes to contracts, request a formal solicitation, and add shipping addresses.

Searching for Carts, Orders and Documents

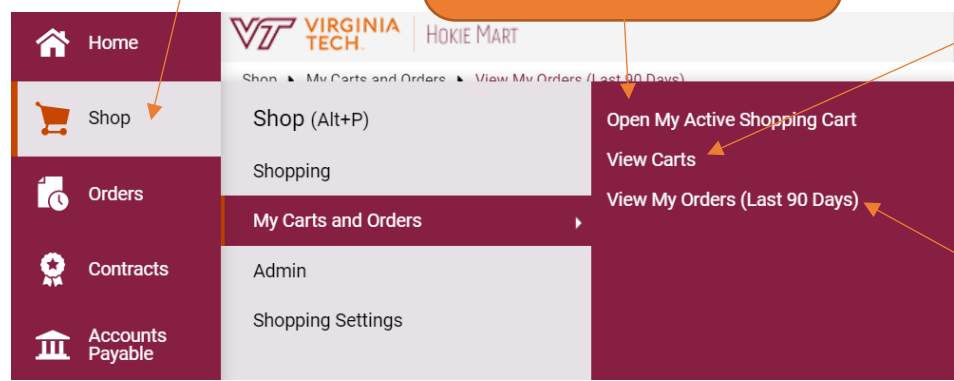
There are several ways to search for Carts (Items that have not been submitted for a requisition) and Pending Orders/Requests (Items that have been submitted as a requisition).

(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.

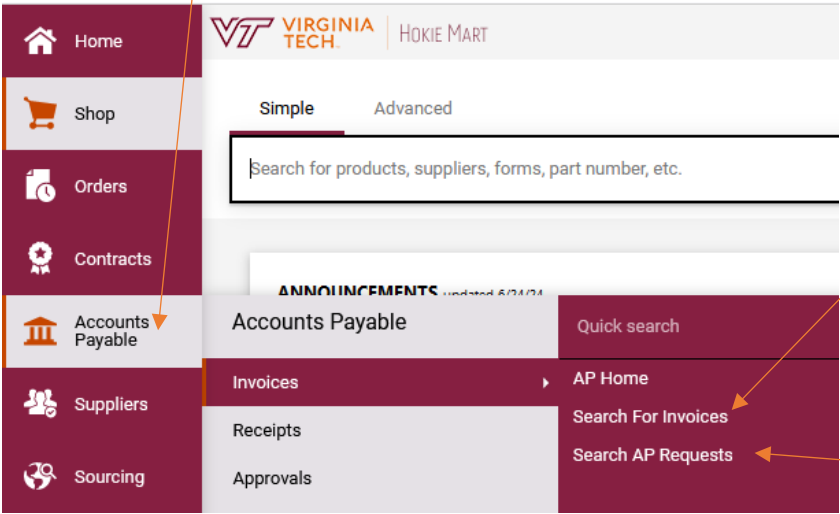


The screenshot shows the Hokie Mart interface. On the left, a navigation bar contains icons for Home, Shop, Orders, Contracts, and Accounts Payable. The 'Shop' menu is expanded, showing options: Shop (Alt+P), Shopping, My Carts and Orders, Admin, and Shopping Settings. The 'My Carts and Orders' option is further expanded to show: Open My Active Shopping Cart, View Carts, and View My Orders (Last 90 Days). The main content area shows the breadcrumb path: Shop > My Carts and Orders > View My Orders (Last 90 Days).

(1) Go to the left bar and select **Accounts Payable**, then **Invoices**.

(2) Select **Search For Invoices** to see all electronic invoices submitted from vendors against purchase orders or Payment Request Form invoices.

(3) Select **Search AP Requests** to see your Payment Request Forms.

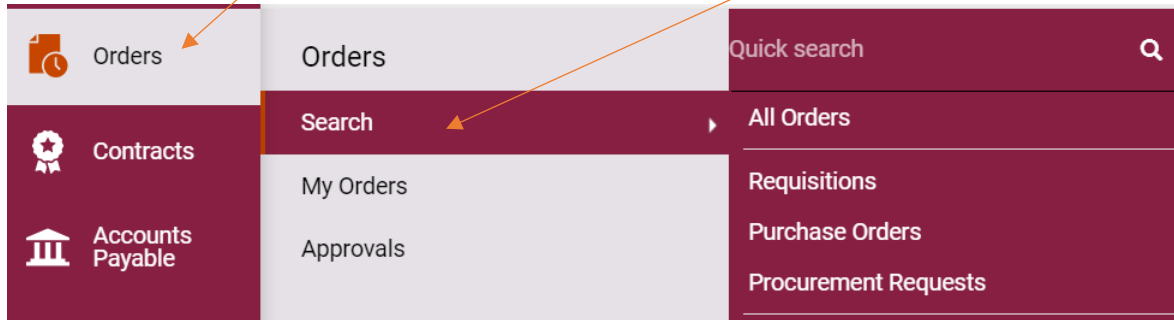


The screenshot shows the Hokie Mart interface. On the left, a navigation bar contains icons for Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, and Sourcing. The 'Accounts Payable' menu is expanded, showing options: Accounts Payable, Invoices, Receipts, and Approvals. The 'Invoices' option is further expanded to show: Quick search, AP Home, Search For Invoices, and Search AP Requests. The main content area shows a search bar with the placeholder text 'Search for products, suppliers, forms, part number, etc.' and a section titled 'ANNOUNCEMENTS'.

Orders Search

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

(2) Go to the Search which allows 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(s).

The screenshot shows the search results page. On the left, there are 'Quick Filters' and 'My Searches' sections. The 'My Searches' section is active, showing 'Manage Searches', 'My Purchase Orders', and 'My Recent Approvals'. Below these are 'Favorite Searches' with a message: 'You do not have any favorite searches yet.' The main content area shows a search filter 'Created Date: Last 90 days' and a search input field. Below the search bar, there are 'Add Filter' and 'Clear All Filters' buttons. The search results are displayed in a table with 14 results. The table has columns for PO Number, Supplier, Created Date/Time, PO Status, Requisition Number, PO Owner, Shipment Status, Matching Status, Total Amount, Receipt Number, and Invoice Status. The first three rows are visible, all with a 'Completed' status.

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 searches on the left side under **Manage Searches** by clicking on **My Searches**.

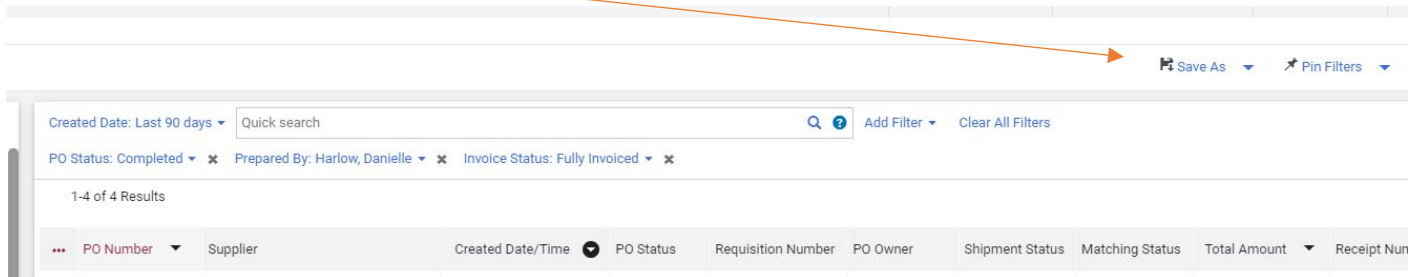
Use the Gear on the right side to create a custom filter and reorder columns.

Saving a Search

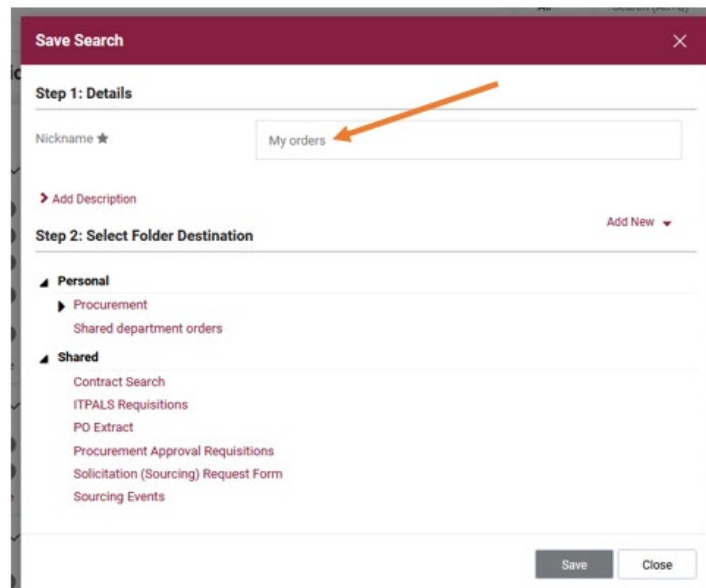
Follow the steps below to save a search once you have applied unique filters.

This process is particularly helpful if you place orders on behalf of another user or Shared Department. This will allow you to have a quick way to bring up all requisitions you prepared, regardless of who they were entered on behalf of.

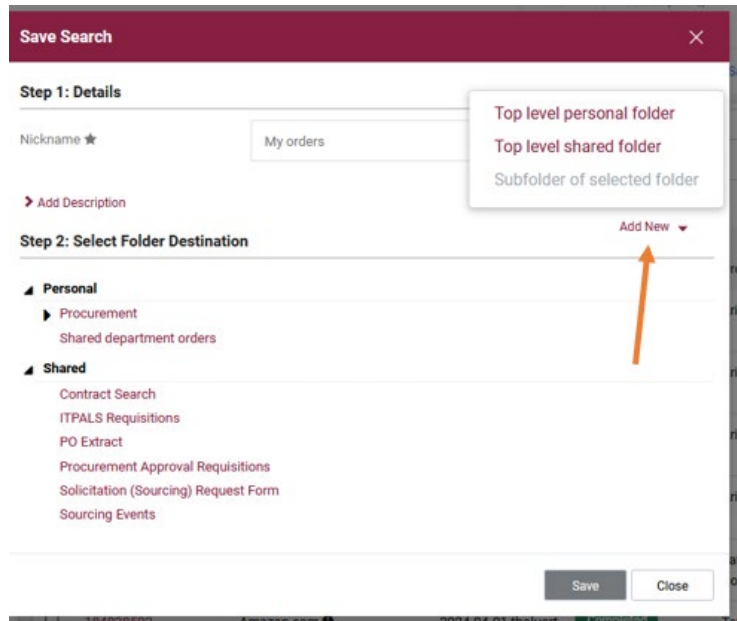
- Select the “Save As” icon



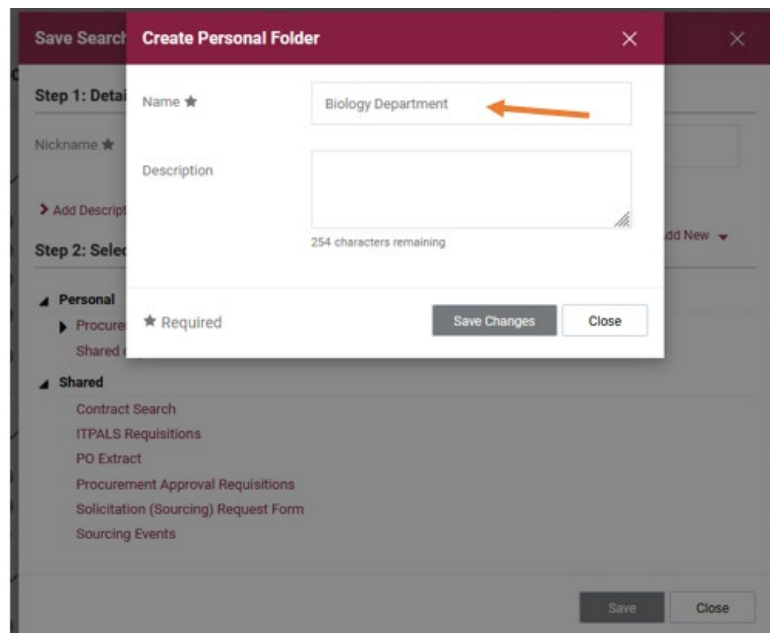
- Enter a nickname that will help you remember the purpose of this search for future reference.



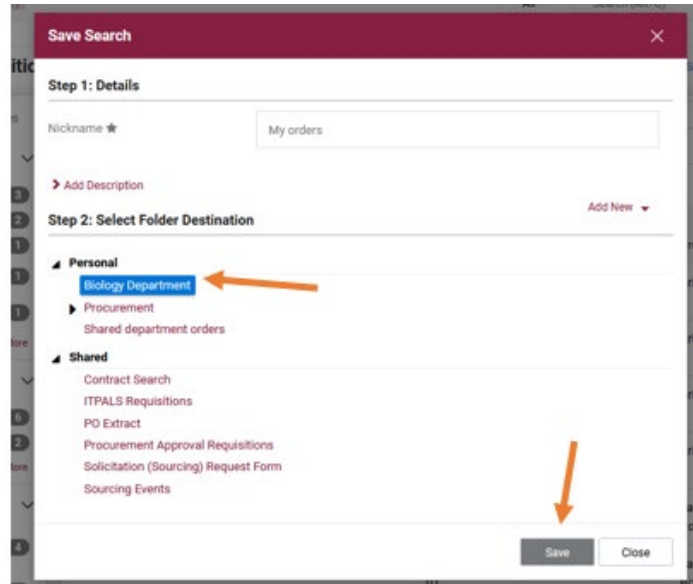
- If you do not have any folders created yet, you'll want to create a new one by clicking Add New. A personal folder will only be viewable by you. A Shared folder will be viewable by other users.



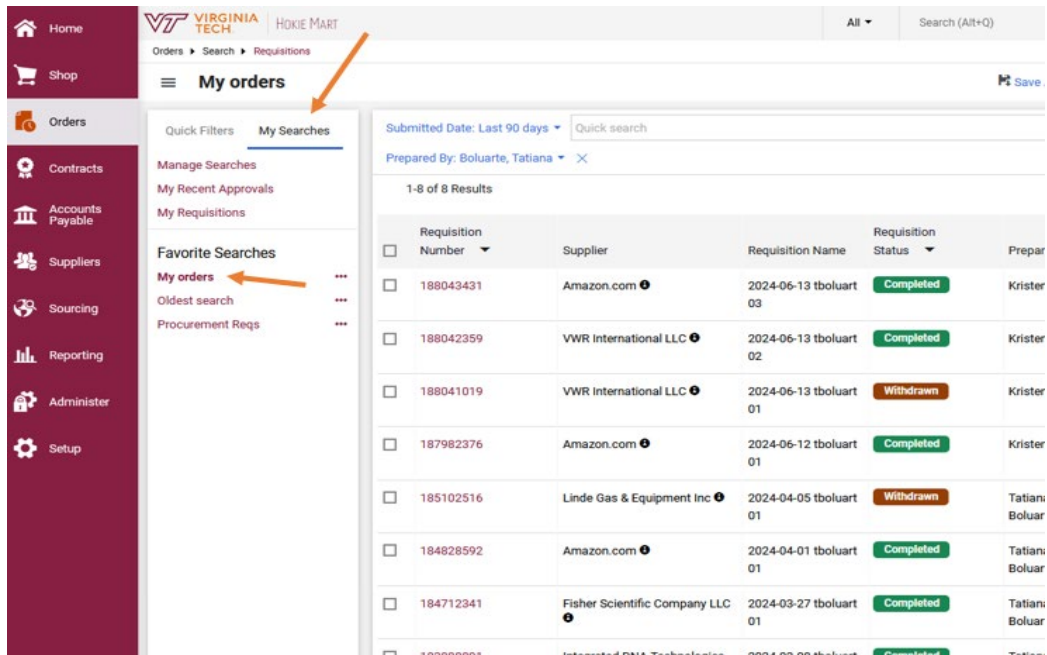
- You will then need to name your folder and save the changes. Name the folder something that makes sense to you.



- Your folder will now be listed and highlighted under Personal (if that's what you chose). Click save to save the search there.



- Now every time you go to **Orders** → **Search Requisitions**, you can click **My Searches** on the left-hand side and then select the saved search you just created.



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 utilizes either a Punchout catalog, Hosted Catalog, or a quote from a vendor to generate a shopping cart. After placing these items in the shopping cart, the Requestor will proceed through the checkout process to create a draft requisition. Once all required fields are complete on the draft requisition, it is submitted in to the workflow of approvals prior to becoming a purchase order.

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 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 into Banner.

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

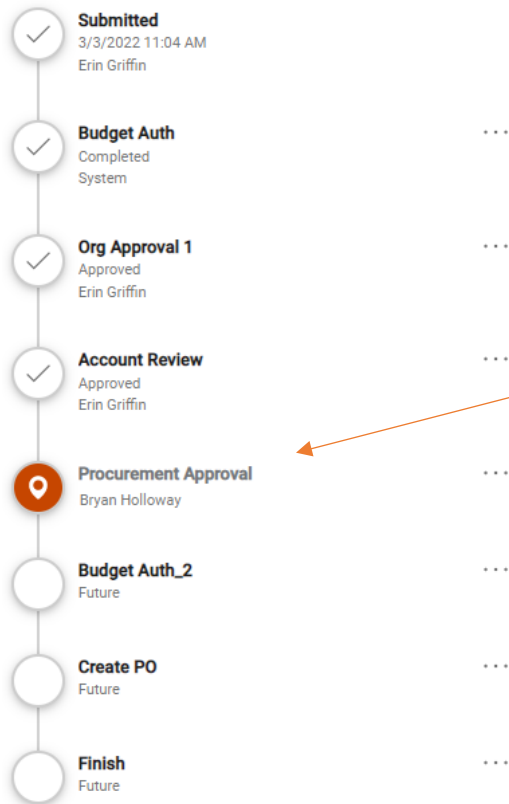
University **Policy 3015, Contract Signature Policy and Procedures**, delegates to department heads the authority to enact purchases of goods and services valued up to \$10,000 per transaction. Department heads may select faculty and staff within their department to exercise this authority. However, 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 in accordance with appropriate state rules and regulations.



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 listed at this step.

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

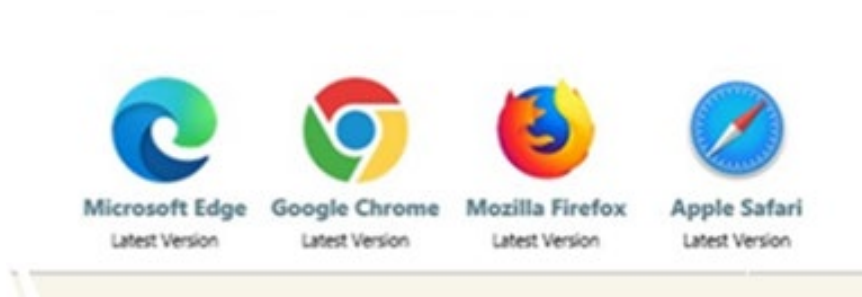
System Requirements

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*




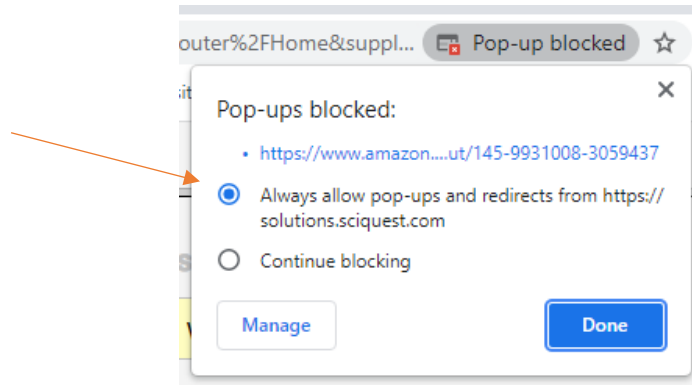
****Please Note:*** iPad is supported by Jaggaer, however, not all Supplier punchout sites will support the use of this device. Additionally, although Safari is supported by Jaggaer, not all Supplier punchout sites will support this browser.

Popup Blockers

Popup blockers should be disabled when using HokieMart. Some of the punchout 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 URL address bar, your browser is blocking popups from HokieMart.

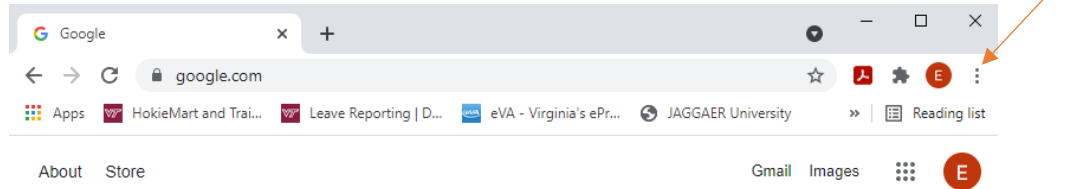
Click on the  icon and select “Always allow popups and redirects from <https://solutions.sciquest.com>” to enable pop-ups from Hokiemark. Doing this will save your settings when accessing Hokiemark in future sessions.



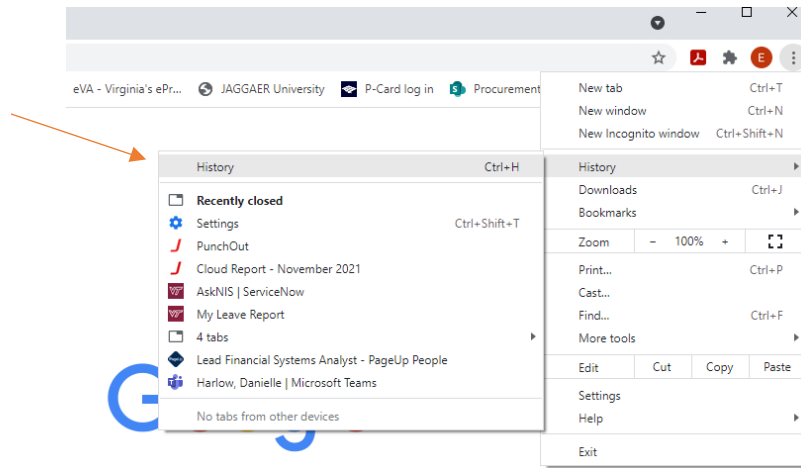
Troubleshooting

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

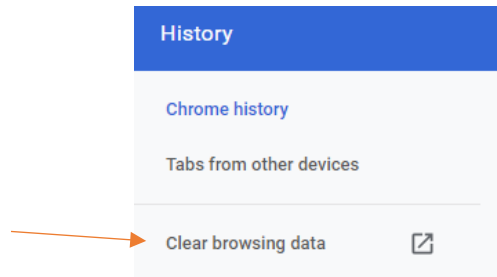
Click on the Tools menu for your browser.



Click on "History".



Click "Clear browsing data".

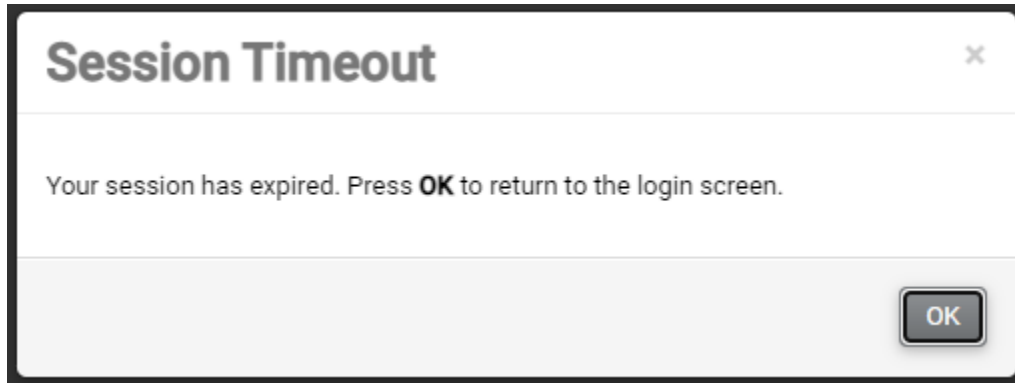


Open a new session of the browser and try accessing HokieMart again.

If users are experiencing outages or additional issues with HokieMart, they should report them to hokiemart@vt.edu.

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.

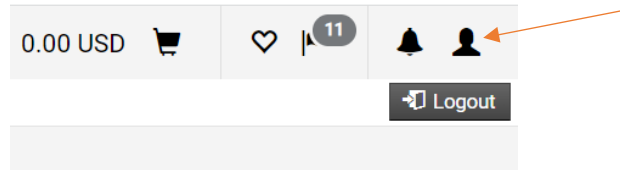


It is important to note that individual punchouts have time-out periods. These, however, are determined by the vendor. It is suggested that if users will not be active in HokieMart for an extended period of time, they should save the cart.

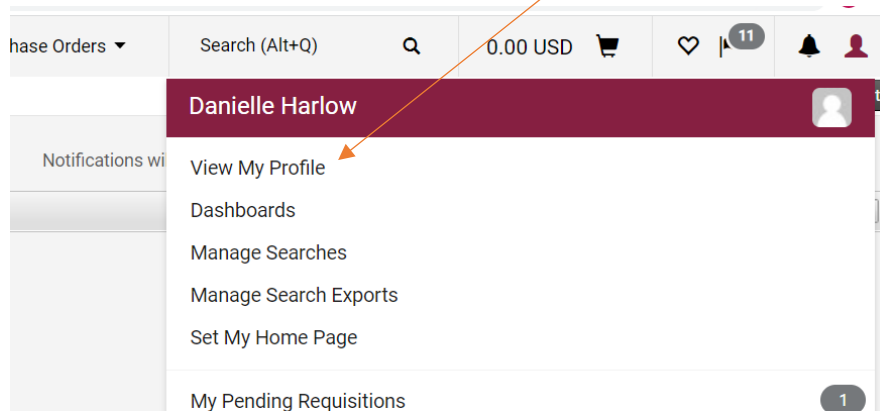
User Information and Settings

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.

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 *	<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		Edit
└ OrgWF1	No Default Value		Edit
└ UGType	No Default Value		Edit
Account	No Default Value		Edit
Activity	No Default Value		Edit
Chart	U	University Chart	Edit
Location	No Default 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 on the requisition document. 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. 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 codes (and activity code(s) 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

Users can choose to save a default ship to address in to their user profile. This address will automatically populate on their requisitions, but can be changed on individual requisitions before submission if needed. Ship to addresses in the system can only be official Virginia Tech campus addresses. If users need to ship to a non-VT campus address location, they can email hokiemart@vt.edu.

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 >

Default Addresses

Ship To Bill To

Select an address to edit Select Addresses for Profile

Shipping Addresses

- default

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 other departments, addresses can 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.**” Type in a key word(s) from the address you are searching. Users can search on the department name, building, or street to locate their desired ship to address.

Please note, shorter search criteria will yield more results. For example, if you are searching for addresses available on “300 Turner Street”, try searching an abbreviated version “300 Turner St.” The text field is not case sensitive.

Select **Search** to view addresses available.

The screenshot shows the 'Default Addresses' page with two tabs: 'Ship To' (selected) and 'Bill To'. Below the tabs is a search bar with the text 'Select an address to edit' and a 'Select Addresses for Profile' button. The 'Shipping Addresses' section on the left shows a 'default' address. The 'Address Search' section on the right has a search input field containing 'north end center', a 'Results Per Page' dropdown set to '10', and a 'Search' button. Below the search bar, it indicates 'Addresses Found: 17' and 'Page 1 of 2'. The search results are listed in a table with columns for 'Name' and 'Address'.

Name	Address
<input type="radio"/> 0176	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
<input type="radio"/> 0216	Contact Name . Phone +1 540-231-8548 Email danielleh@vt.edu Diversity and Inclusion North End Center Ste 3500 300 Turner St NW Blacksburg, VA 24061 United States
<input type="radio"/> 0312	Contact Name . Phone +1 540-231-8548 Email danielleh@vt.edu Controller North End Center Ste 3300 300 Turner St NW Blacksburg, VA 24061

To add the address to your profile

- Place the cursor in the radio button and click. The address will be displayed.
- The **Contact Name** field defaults to a period “.” Users should always type a name in to this field. Leaving a period can cause system issues in order transmission. The Contact Name can be changed on the draft requisition if needed.
- Phone and Email will default in with the user’s information. These can be changed on individual requisitions in draft status as needed.
- Click **Save**.

Default Addresses

The screenshot displays a web interface for managing default addresses. At the top, there are two tabs: 'Ship To' (selected) and 'Bill To'. Below the tabs, there are two buttons: 'Select Addresses for Profile' and 'Delete Address'. A message 'Select an address to edit' is shown. On the left, a 'Shipping Addresses' list contains one entry, 'default'. On the right, the 'Edit Selected Address' form is open, showing fields for Nickname (0333), Default (checkbox), Current Default Address (default), and ADDRESS details: Contact Name (*), Phone (+1 540-231-8548), Email (*, danielleh@vt.edu), Address Line 1 (Procurement), Address Line 2 (North End Center Ste 2100), Address Line 3 (300 Turner St NW), City (Blacksburg), State (VA), Zip Code (24061), and Country (United States). A 'Save' button is at the bottom.

If only one address is needed, it will appear as the default.

Users have the ability to select multiple Ship To addresses based on their needs and the needs of their department. If additional addresses are necessary, users have the ability to select a particular address as their default by checking off the Default checkbox.

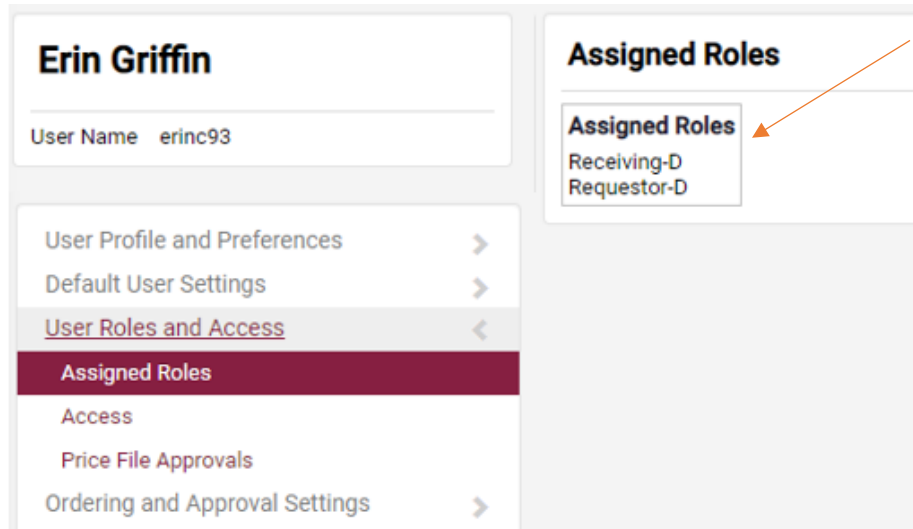
To select additional addresses, click on **Select Addresses for Profile** and follow the same steps as above.

Addresses can be deleted from the user profile by clicking **Delete Address**.

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.

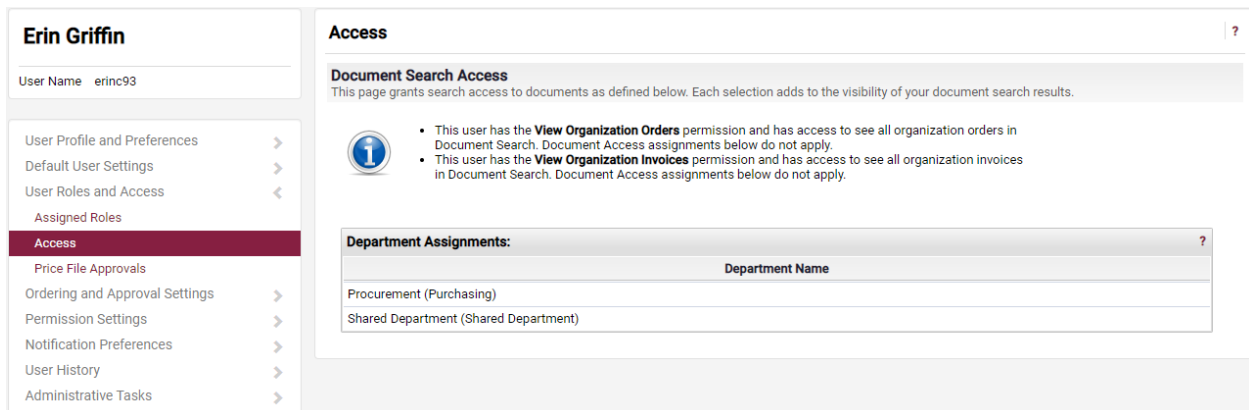
To view your assigned role(s), click on “Assigned Roles” under the “User Roles and Access” option.



If roles need to be changed or updated, complete the appropriate HokieMart **Access Request Form** and mail it to the Controller’s Office or email an electronic copy to General Accounting at genactg@vt.edu.

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

Users can choose to be notified when specific actions take place within the system. 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 a user profile for Danielle Harlow. The left sidebar contains a menu with 'Notification Preferences' highlighted in a dark red bar. The main content area is titled 'Notification Preferences: Purchase Orders' and displays a list of notification events with their corresponding notification types. An orange box highlights the 'Purchase Orders' menu item in the sidebar.

Event	Notification Type
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.

The screenshot shows the 'Edit Section' button for the 'Purchase Orders' notification preferences. An orange arrow points to the 'Edit Section' button, which is located at the top right of the notification list.

Event	Notification Type
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.

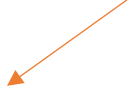
Email - will send an email to your email address.

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

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

Notification Preferences: Purchase Orders ?

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



Once you've made your edits click the **save changes** button.

The Procurement Department recommends the Requester turn on the following notifications:

Shopping, Carts, & Requisitions


- **PR Workflow complete/PO created** – Email notice that a requisition successfully completed workflow and that the system will create its purchase order(s).
- **PR line items rejected** – Email to a requisitioner that an approver rejected one or more line items on a requisition.
- **Cart/PR rejected/returned** – Email to a requisitioner that an approver has either rejected or returned a requisition.

Purchase Orders

- **PO Workflow complete** – Email notice that a purchase order successfully completed workflow.
- **PO line item(s) rejected** – Email to a requisitioner that an approver rejected one or more line items on a purchase order.
- **PO Rejected** – Email to a requisitioner that an approver rejected an entire purchase order.

Accounts Payable

- **Invoice rejected** – Email to an invoice owner that an approver rejected an entire invoice or credit memo.
- **Invoice returned** – Email and/or notification indicating that an invoice has been returned to the user.

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 Purchases

There are several types of forms in HokieMart:

1. **University Forms** – these forms allow Requestors to enter purchase requisitions through HokieMart for different types of transactions.
2. **Payment Request forms** – these forms are used to process payments to vendors that do not require a purchase order.
3. **Procurement Related forms** – these forms are used not used to purchase goods or services, but rather are used to make various requests to Procurement.

University Forms

There are five (5) 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. Punchout
2. Hosted Catalog
3. Interdepartmental Service Request (ISR)
4. Travel Agency Authorization
5. Non-Catalog

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

Types of Suppliers

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

- Hosted Catalog Suppliers
- Punchout Suppliers
- Internal Vendors
- 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 into 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. The Contracts module within HokieMart serves as the university's repository for procurement contracts.

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

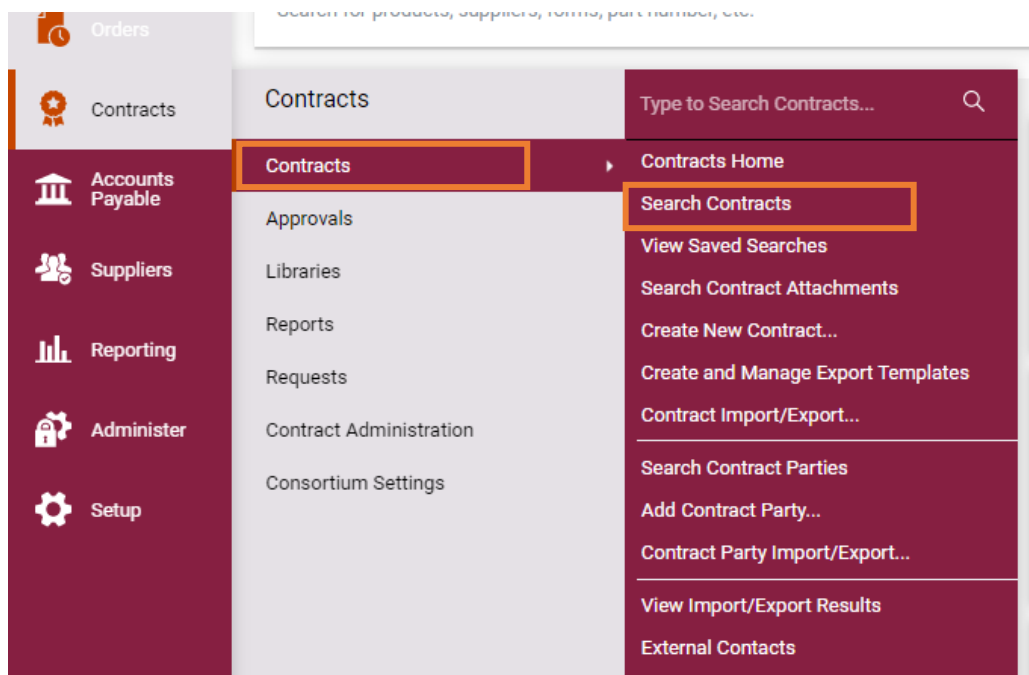
- view contracts available to their department
- review information about a contract (dates, description, etc.)
- search for a contract

Viewing Contracts

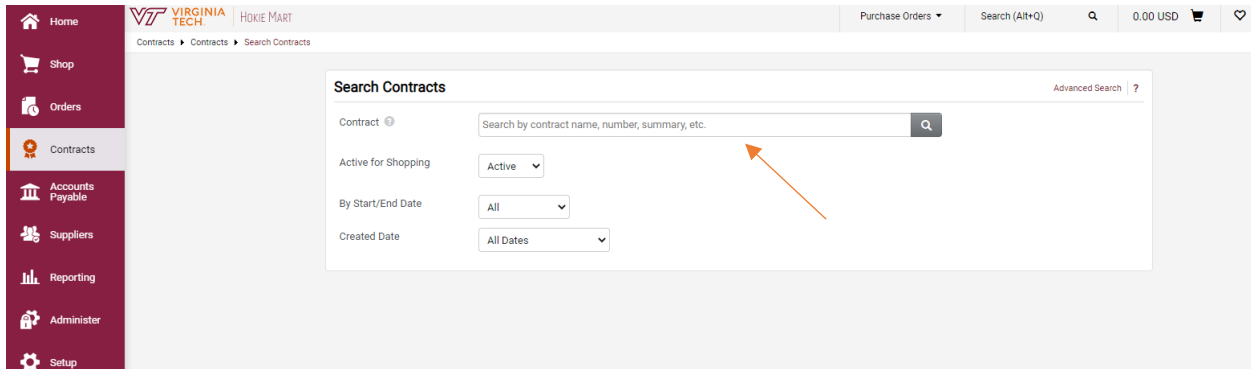
Contracts can be viewed in HokieMart, based on user access, or outside of the HokieMart system through our [Contracts Search Tool](#).

To view contracts through the Contracts Search Tool, navigate to the Procurement website (procurement.vt.edu) and click on the menu on the right-hand side. Under **“For Departments,”** select **VT Contracts**. Users can then search for vendor names, commodities, or keywords, and also have the ability to add filters to their search results.

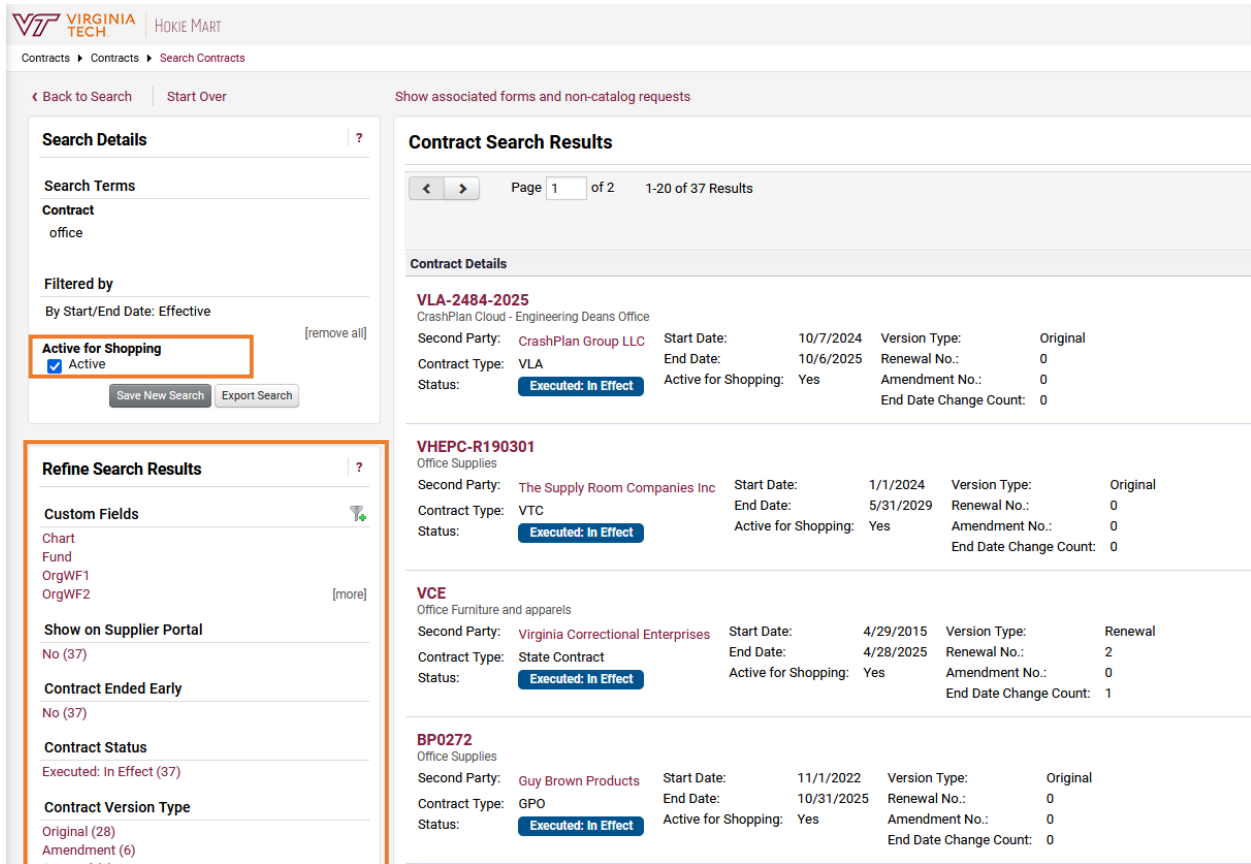
Contract information can also be found in HokieMart. Navigate to the contracts search option by going to the Contracts menu and then selecting **Contracts → Search Contracts**.



In the Contract field, type in the vendor name, contract number, or commodity to display search results.



Search results will show contracts. Users can select filters along the left-hand side to narrow results.



Click on the desired contract number for detailed information about the 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	... <input type="checkbox"/>
ITEM DETAILS						
Manufacturer Name	3M	Contract:	VTG-221-2021	Internal Note	no value	
Manufacturer	08242			Internal Attachments	Add	

“**Select contract**” will appear when a contract may be university-wide but not all good/services are included in the contract. Certain users may also have access to contracts that are not university wide and may need to select them on their individual requisitions.

If you are in your shopping cart, you can select the contract directly on the line item by clicking on the text that says “Select contract...”

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
▲ Contract(s) available for assignment to this line.							
1	Box of paper		EA	50.00	1 EA	50.00	<input type="checkbox"/>
ITEM DETAILS							
	Contract:	Select contract...		Internal Note			

If you are working in your draft requisition, click on the pencil icon directly on that line item.

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
▲ Contract(s) available for assignment to this line.							
1	Box of paper		EA	50.00	1 EA	50.00	... <input type="checkbox"/>
ITEM DETAILS							
	Contract:	no value		Internal Note	no value		

Click on the text that says “Select contract...”

Edit Line 1: Item Details

1 Box of paper EA 50.00

Contract: **Select contract...** Contract(s) available for assignment to this line. Internal Note

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

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

Select the radio button next to the contract number and click **save** to apply the contract.

Change Price

Select a Price and Contract Here

Step 1: Select a Price Step 2: Select a Contract

50.00 USD (Current price) No Contract

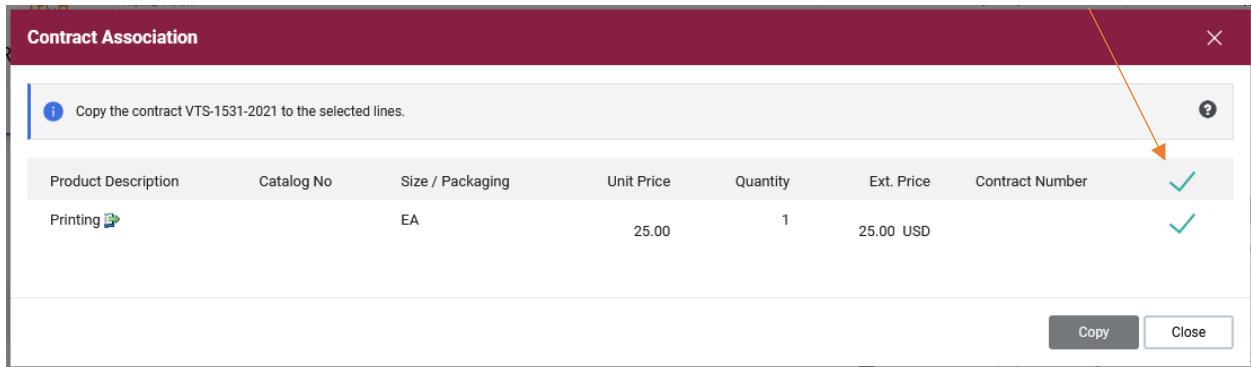
VTS-1531-2021 (Print and Document Services)
Print and Document Services

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

If you have additional line items on your requisition, you can copy the selected contract to other lines.

Line	Item	Catalog No.	Size/ Packaging	Unit Price	Quantity	Ext. Price	
1	Box of paper		EA	50.00	1 EA	50.00	...
ITEM DETAILS							
Contract:		VTS-1531-2021		Internal Note	no value		
		copy to other lines...		Internal Attachments	Add		
				Attachments for supplier	Add		
Contract(s) available for assignment to this line.							
2	Printing		EA	25.00	1 EA	25.00	...
ITEM DETAILS							
Contract:		no value		Internal Note	no value		

Click the checkbox next to the other line items to apply the contract. Click **Copy**.



All line items on a single requisition should have the same contract number. If requisitions are submitted with the contract number on only some of the line items, the requisition will split out in to multiple purchase orders.

General Contract Information

Contracts are set up with an ordering address. Payment addresses against contracts may not be listed in the supplier search and will not show on the requisition document. Please choose the order address (usually the bold address) and the Controller's Office will process the payment to the correct payment address based on default information or what is displayed on the invoice.

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.

Hosted Catalogs

Send to supplier method: HokieMart Will Deliver

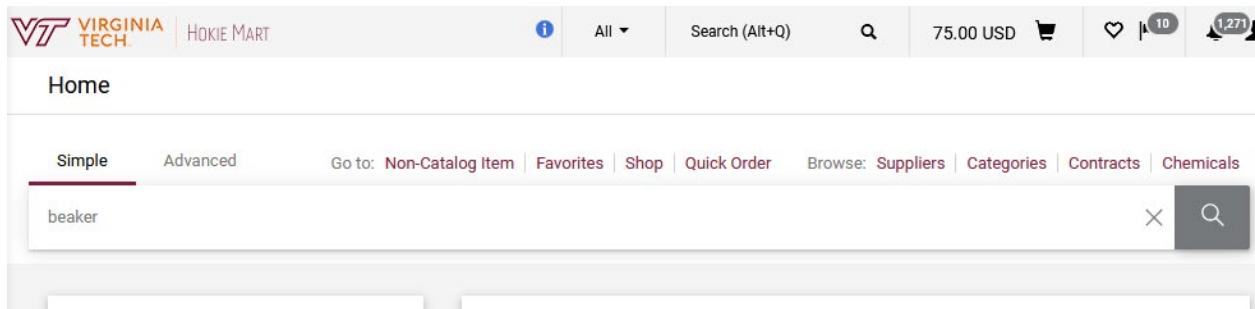
Hosted Catalogs allow users to search for a particular item with suppliers who have a catalog housed within HokieMart. There are two main types of hosted catalog suppliers: contract and non-contract.

Hosted Catalog suppliers with university contracts are displayed on the home page of HokieMart. Users can shop hosted catalogs in two ways, by using the simple search bar on the home page of HokieMart or by accessing a specific supplier's hosted catalog.

Simple Search

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, "beaker"



- Click the magnifying glass to search

The requested search information will be displayed.

The screenshot shows the Hokie Mart search results for 'beaker'. The page includes a navigation bar with the Virginia Tech logo, a search bar containing 'beaker', and a price of 75.00 USD. Below the search bar, there are tabs for 'Simple' and 'Advanced' search, and a 'Compare' button. The search results are displayed in a grid format, with a sidebar on the left for filters. The filters are categorized into 'By Supplier' and 'By Supplier Class'. The main grid shows three items, each with a placeholder image, a description, a price, and an 'Add To Cart' button. The items are:

- Beaker Griffin Low-form PP 30 mL;30 mL;12/PK;48/CS from Laboratory Disposable Products Inc. Price: 166.00 USD.
- Beaker Griffin Low-form PP 50 mL;50 mL;12/PK;48/CS from Laboratory Disposable Products Inc. Price: 156.00 USD.
- Beaker Griffin Low-form PP 100 mL;100 mL;12/PK;48/CS from Laboratory Disposable Products Inc. Price: 203.00 USD.

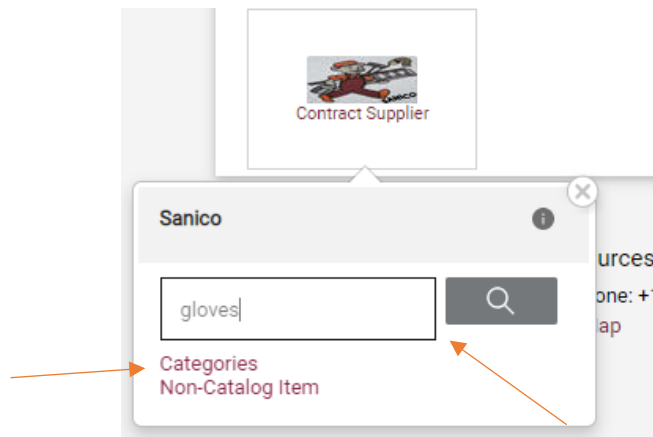
Scroll down to view all item options. Clicking on the item description may offer more specifics on that item. Users can filter search results using the filters along the right hand side.

Edit quantity on the desired item(s) and select **Add To Cart**.

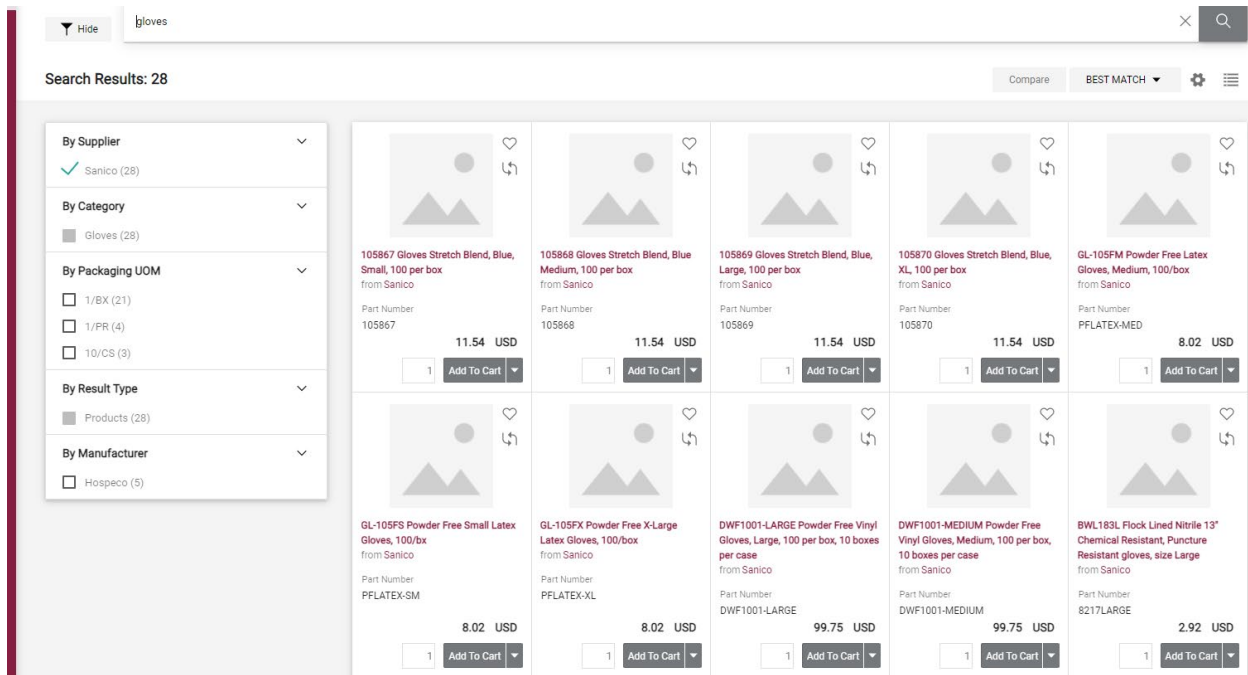
This is a close-up view of a product listing for a 'Polycarbonate graduated beaker with handle, 470 mL' from Cole-Parmer Instrument Company. The price is 32.80 USD. The listing includes a placeholder image, a description, a part number (06004-80), and a quantity field set to 1. An orange arrow points to the quantity field, and the 'Add To Cart' button is visible.

Contract Supplier Hosted Catalogs

Contracted 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 contracted supplier, click on the icon/tile and enter what you are looking for in the search bar or click on Categories to view a listing of all the commodities they offer.

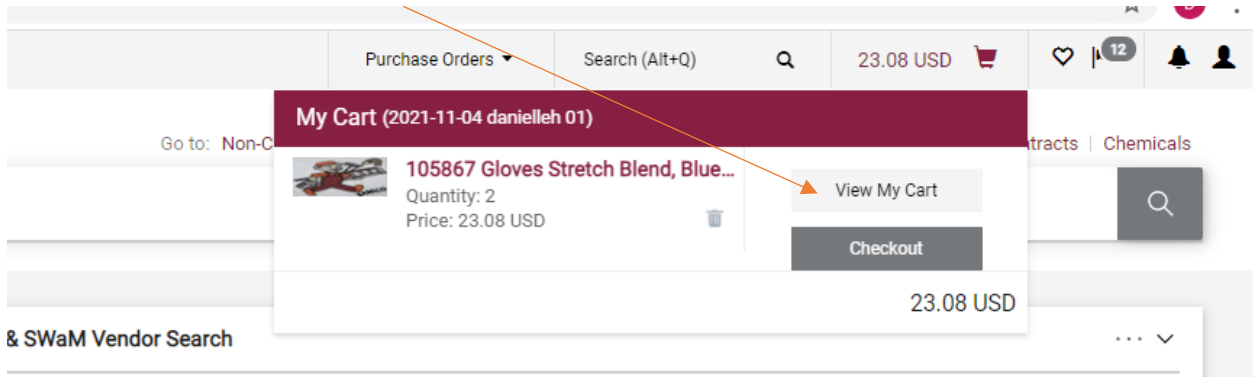


Click the magnifying glass to search. Results are displayed similar to using the simple search bar, however these results will already be filtered to a specific supplier.



Follow the steps above to add items to your cart.

Once items have been added to your cart, you will need to select the Cart icon at the top and Select **View My Cart** to proceed with checking out and creating a draft requisition.



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.

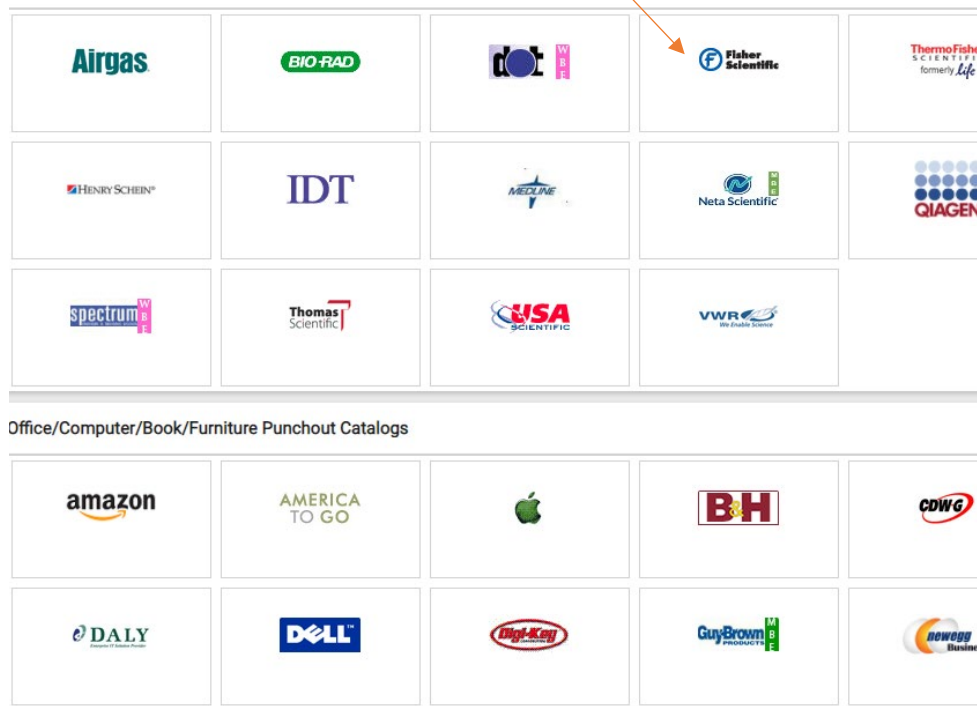
Punchout Vendors

Send to Supplier Method: HokieMart 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.

Punchouts are maintained on the Supplier's website. Click on the icon for the supplier to be redirected to the supplier's website. Once a user has created a shopping cart within the punchout, items will transfer back in to HokieMart to create a requisition.

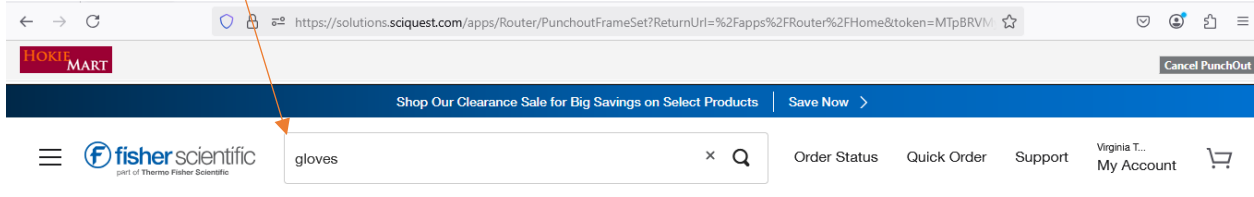
- Select desired Punchout supplier



Users will be punched out of HokieMart and onto the supplier's website for VT ordering. 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 punchout order, you access the supplier's website via HokieMart. Always have your pop-ups enabled on your web browser to allow the punchouts to open.

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



Welcome Virginia Tech

Over the years, the Fisher Scientific channel has supported the Virginia Tech research community's pursuit to improve the quality of life through innovative research.

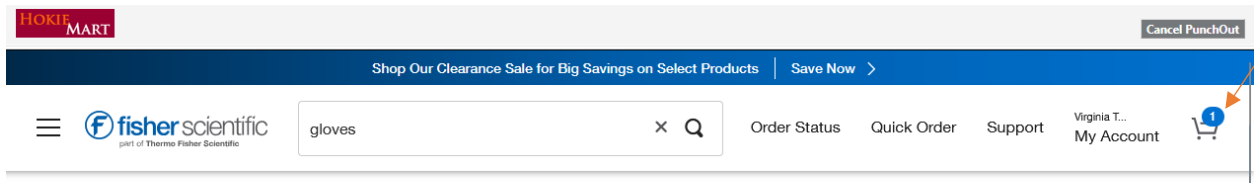
As Virginia Tech's approved supplier for lab supplies/equipment, chemicals, and consumables, the Fisher Scientific channel provides you with the products, services, and assistance you need to stay focused on your critical research. The Fisher Scientific channel offers an extensive product portfolio and a knowledgeable and responsive customer support team that helps ensure you get the right products at the right time. We look forward to serving your business!

Contacts

Maria Bryson
Sales Representative
+1 540-682-9330 (Cell)
maria.bryson@thermofisher.com

Fisher Scientific Customer Service
+1 800-766-7000
+1 800-926-1166 (Fax)
3970 Johns Creek Court
Suite 500

Add your item to the cart and click the check out or cart button.



Preferred Product

- Hot List Item (20)
- Switch and Save Item (18)

Category

- Work Gloves (1,202)
- Exam Gloves (525)
- General-Purpose Industrial Gloves (394)
- Chemical Resistant Gloves (331)
- Glove Accessories (230)
- Cold Resistant Gloves (187)
- Cleanroom Gloves (183)

Show all

Brands


Enter a brand name

Search results for "gloves"

Finding the Right Disposable Gloves

1 - 15 of 5,162 results

1



Nitrile Examination Disposable Gloves
Disposable nitrile gloves, powder free, non-sterile, ambidextrous

edge»»

Pricing & Availability Specifications


Catalog Number	Size	Price	Quantity	Availability
NGPF7001	Small	<input checked="" type="radio"/> \$7.59 Pack of 100	1	Check Availability edge»»
		<input type="radio"/> \$69.01 Case of 10 PK		<input checked="" type="checkbox"/> In Stock Available for delivery by Apr 02 Ships from NAZARETH, PA (EPD)

Punchouts can offer additional benefits such as estimated ship times and product availability.

Submit your cart for approval within the Supplier catalog.

Please note: this is the last place you can make changes to the items on this order. If changes must be made to the line items after punching back in to HokieMart, users will need to delete the cart and start from scratch within the punchout.

Account: 857660001

Item	Price	Quantity	Subtotal
 Nitrile Examination Disposable Gloves Catalog Number: NGPF7001 Size: Small	<input checked="" type="radio"/> \$7.59 / Pack of 100 <input type="radio"/> \$89.61 / Case of 10 PK	1	\$7.59

Return Cart to Purchasing Application

Order Summary

Subtotal (1 Item) \$7.59

Order Total \$7.59

[Apply Promotion Code](#)

Cancel Punchout

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

Shopping Cart · Shopping Cart

1 Item

Fisher Scientific Company LLC · 1 Item · 7.59 USD

SUPPLIER DETAILS Order Address 2 : 3970 Johns Creek Ct Ste 500, Suwanee, Georgia 30024-1297 United States

Contract VTG-546-2017 PO Number To Be Assigned

Line	Item	Catalog No.	Size/ Packaging	Unit Price	Quantity	Ext. Price
1	NITRILE POWDER FREE GLOVES S	NGPF7001	PK	7.59	Qty: 1 PK	7.59

ITEM DETAILS

Manufacturer Name Unknown Contract: VTG-546-2017 Internal Note
Select contract...

Manufacturer NGPF7001

Summary

Details

Total (7.59 USD)

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

Subtotal ★ **7.59**

Total ★ **7.59**

Tips:

- *Suppliers will not receive any external notes or external attachments on punchout PO's due to cXML transmission.*
- *Punchout orders are invoiced via cXML or supplier portal. Campus users will be able to see invoices for punchout orders on the invoice tab of their purchase order.*
- *User may NOT copy a cart that was created through a punchout.*
- *After returning to the cart, users may NOT add or delete items in the cart of the punchout. If changes need to be made to the items in the cart, users need to delete the entire cart and rebuild the order again through the punchout.*

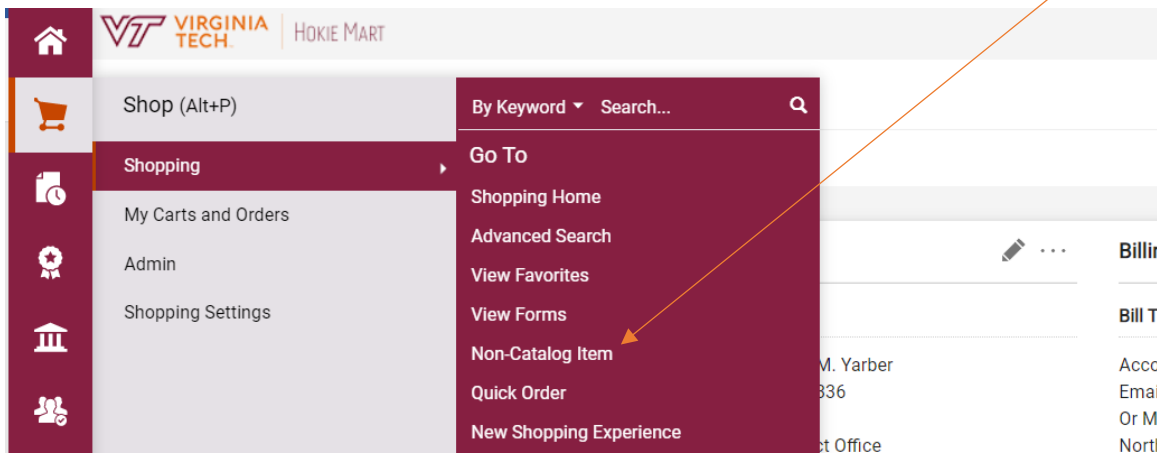
Non-Catalog Item

Send to Supplier Method: HokieMart Will Deliver *OR* User Will Deliver

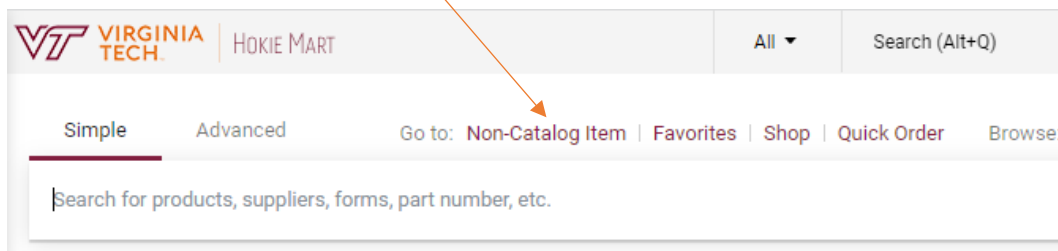
The Non-Catalog Item form allows users to purchase items or services and cannot be handled through the Hosted Catalog, Punchouts, Interdepartmental Service Request, Payment Forms, or Travel Agency Authorization.

Users should always contact the supplier prior to issuing a non-catalog requisition to be sure that the supplier will accept a purchase order and to obtain a quote for the items desired.

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.

A screenshot of the 'Add Non-Catalog Item' form. The form is titled 'Add Non-Catalog Item' and has a close button in the top right corner. Under the 'Existing Supplier' section, there is a search box labeled 'Select Supplier' with a magnifying glass icon. An orange arrow points to this search box. Below the search box, there is a table with columns for 'Description', 'Catalog No.', 'Quantity', 'Price', and 'Packaging'. The 'Packaging' column has a dropdown menu set to 'EA - Each'. At the bottom of the form, there are buttons for 'Save', 'Save And Add Another', and 'Close'. A legend indicates that fields with a star icon are required.

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

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

Select the desired supplier.

Note: If the supplier you're 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.).

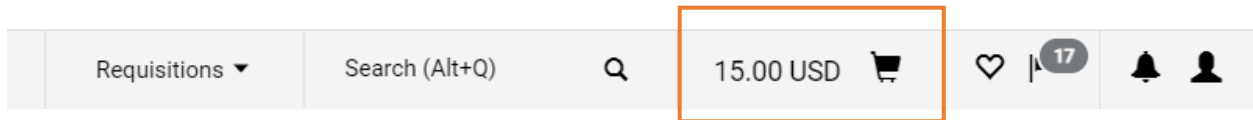
Product Description	Catalog No.	Quantity	Price Estimate	Packaging
Legal size paper	pp-ct-55	1	45.00	BX - Box

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 and items will be displayed in the shopping cart.



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

Users can click on the shopping cart and proceed with checkout to create a draft requisition, or they can come back to the cart at a later time to continue adding items and process the cart.

Interdepartmental Service Request (ISR)

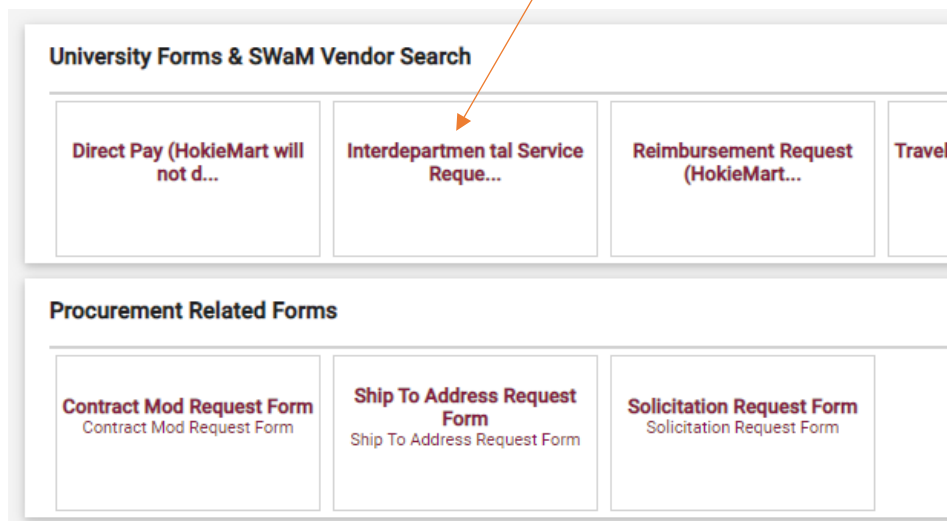
Send to Supplier Method: HokieMart will deliver PO

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

ISR forms are billed through a journal entry in Banner by the department acting as the internal supplier. Invoices for these transactions are not processed by Accounts Payable.

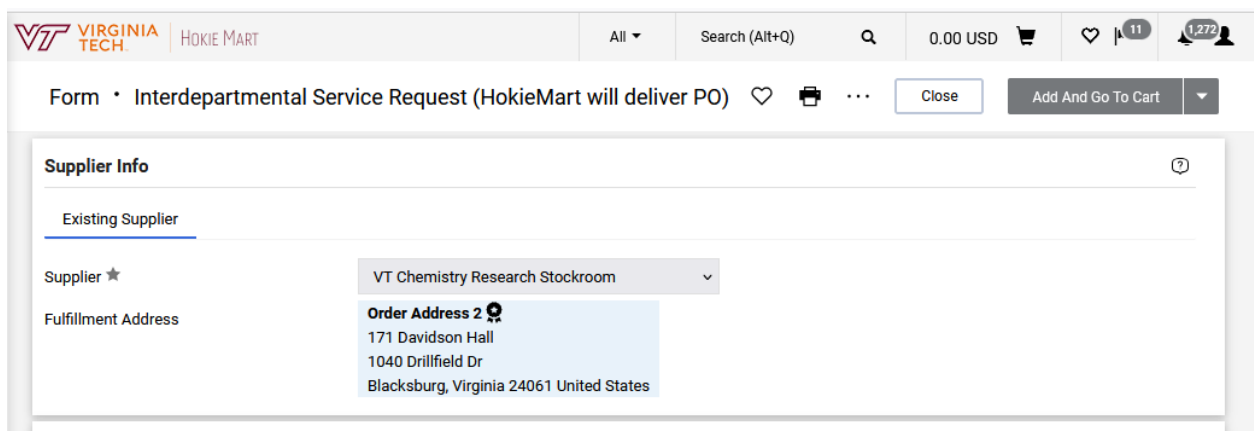
From the Main Screen of HokieMart under University Forms

- Select **Interdepartmental Service Request**



From the drop-down menu:

- Choose the desired VT Supplier. A listing of all Virginia Tech Internal Suppliers can be found [here](#). The order address will default in.



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 of items or users can enter a quantity of 1 for a service.
- Packaging defaults to **EA – each** but can be changed if needed.
- Estimated Price – enter how much you think the request will cost. This can be an exact amount quoted from the supplier or can be an estimate. This will be the amount encumbered for that line item.

The screenshot shows the 'General Info' section of a form. It includes a 'Non-Configurable Fields' header and a 'General Info Instructions' block. Below this are several required fields marked with a star: 'Form Type' (Interdepartmental Service Request), 'Catalog No.' (ISR), 'Product Description' (Beakers), 'Quantity' (5), 'Packaging' (EA - Each), and 'Estimated Price' (7.00). The Product Description field has a character count of 247 remaining and expand/clear options.

- Complete the **External Info** portion of the form. If this portion is not completed, error messages may appear on the requisition. All areas designated with a star are required fields.

The screenshot shows the 'External Info' section of the form. It includes an 'External Info Instructions' block and several required fields marked with a star: 'Service Required by' (3/31/2025), 'Department' (Procurement), 'Building / Room' (North End Center 2100), 'Contact Name' (HokieBird), and 'Contact Phone' (540-231-6221). There is also an 'External Notes' field with a character count of 948 remaining and expand/clear options. At the bottom, there is an 'External Attachments' section with an 'Add' button.

- If attachments are necessary, click **Add** in the **External Attachments** field.

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

Once you have entered your item, from the Available Actions drop-down menu, either click **Add and Go To Cart** or **Add to Cart and Return** to continue adding items.

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.

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 [here](#).

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.

Additionally, the Procurement department does not release encumbrances on ISR purchase orders. Encumbrances on cancelled ISR purchase orders can be released by the internal vendor through their billing process. Departments should contact the internal vendor directly for encumbrance releases on their purchase orders.

Travel Agency Authorization

Send to Supplier Method: 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.

Campus users should have contacted the contracted travel agent and arranged travel prior to submitting this form. The travel confirmation provided by the travel agent can be used by the department when entering in this form.

From Main Screen of HokieMart under the University Forms:

- Click **Travel Agency Authorization**:

The screenshot shows a web interface with two main sections. The top section is titled "University Forms & SWaM Vendor Search" and contains five buttons: "Direct Pay (HokieMart will not d...", "Interdepartmental 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 bottom section is titled "Procurement Related Forms" and 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 contract vendor you worked with to arrange travel.

Form • Travel Agency Authorization (HokieMart will deliver PO)

The screenshot shows the "Supplier Info" section of the form. The "Supplier" field is set to "Existing Supplier" and has a dropdown arrow. The dropdown menu is open, showing a list of travel agencies: "AAA Corporate Travel", "Anthony Travel LLC", "Covington Travel Service Inc", "Martin Travel Agency LLC", and "Omega World Travel". The "Form Type" field is set to "HokieMart will deliver PO".

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

- **Catalog No.** – type the traveler’s name as it appears on the driver’s license.
- **Product Description** is the location to provide information for the travel agent. Be as specific as necessary to ensure proper travel is arranged.
- **Quantity** should always be 1. This will be for one traveler.
- **Packaging** - will remain EA – each.
- Estimated price will be for the travel and all associated costs provided to you from your travel agent.

General Info ?

Non-Configurable Fields

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.). **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.

Form Type ★ Travel Agency Authorization (HokieMart will deliver PO)

Catalog No. ★

Product Description ★
141 characters remaining [expand](#) | [clear](#)

Quantity ★

Packaging ★

Estimated Price ★

Internal Info should provide the business purpose of the trip and any supporting attachments, such as the itinerary.

Internal Info ?

Internal Info Instructions Purpose of trip.

Internal Notes (1000 char) ★
932 characters remaining [expand](#) | [clear](#)

Internal Attachments [Add](#)

External Info should contain any information that would help the travel agency match this PO up with the arranged travel in their system. Best practice is to always include or reference the confirmation they provided you.

External Info ⓘ

External Info Instructions Enter additional travel agency instructions in External Notes.

External Notes (1000 char)

See confirmation number K902LDC3 attached.
Travel arranged with Tracy at AAA.

923 characters remaining expand | clear

External Attachments Add

↓ Hokie Bird travel confirmation.docx ...

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

This section outlines the steps to complete the Shopping Cart and finalize the Purchase Requisition (PR). While each purchase order transaction may be processed on a different form, all form types result in the same shopping cart and requisition document format.

Create the Cart

Users must first enter their transaction on the appropriate form type to create a shopping cart. The sections above detail how to process a transaction on each of the form types available in HokieMart (Punchout, Hosted Catalog, Non-Catalog, ISR, Travel Agency Authorization).

Edit the Cart

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

Cart Name - Users can assign a unique name to their cart, making it easier to find past requisitions. This is optional, but useful for frequent purchases from the same supplier. Cart names display on search results.

Priority - This field is used to communicate to the Procurement Buyer when departments have a requisition above delegation that requires urgent processing. PRs default to **Normal** priority. Users can select **Urgent** from a drop-down menu **only** for critical PRs exceeding departmental delegation. Most PRs should remain **Normal**.

Shopping Cart · Shopping Cart

Simple Advanced

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

Cart Name: Internal Note: Note to all Suppliers:

Priority: **Normal**

Leave date blank unless next fiscal year order (then enter 07/01/2024)

Send to Supplier?

Will this PO require incremental payments (i.e. cost receiving)?

Notify AP-Prepayment

Prepared for:

Notify AP-Prepayment – check off this field if a prepayment is required on a purchase order. See Prepayment notification in this user guide for additional details.

Date Field – this is used to indicate that a PO will not be paid for on this fiscal year's funds. As fiscal year end approaches, users can enter in July 1 and the current year to prevent their PO from paying out until next fiscal year. In most cases, this field should be left blank.

Will this PO require incremental payments? –
Users should check off this field if the PO will be paid using cost receipts rather than quantity receipts.

Internal Note and Note to all Suppliers – Users can enter in internal and external notes here. Internal notes are intended for departmental documentation. Notes to suppliers are intended for external communications.

The screenshot shows a 'Shopping Cart' form with the following fields and callouts:

- Cart Name:** 2025-04-01 erinc93 01
- Priority:** Normal
- Leave date blank unless next fiscal year order (then enter 07/01/2024):** mm/dd/yyyy
- Notify AP-Prepayment:**
- Prepared for:** Erin Griffin
- Internal Note:** 1000 characters remaining, expand | clear
- Note to all Suppliers:** 1000 characters remaining, expand | clear
- Send to Supplier?:** HokieMart Will Deliver
- Will this PO require incremental payments (i.e. cost receiving)?**

Prepared For (On-Behalf-Of) –
If you do not have access to the funding source for this purchase, or are an On-Behalf-Of Requestor, here is where you can enter in the name of another Requestor or “Shared Department.”

Send to Supplier? – this refers to whether or not the supplier will get a copy of the PO sent by the system.

HokieMart Will Deliver (default) means the system will automatically deliver 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

Once users have made the appropriate adjustments to the fields on the shopping cart, click **Proceed to Checkout** to create the draft requisition. Information on the shopping cart will transfer to the draft requisition and users will have the option to made edits before submitting the requisition.

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.

11 Items

New River Office Supply Inc · 11 Items · 360.11 USD

^ **SUPPLIER DETAILS** Order Address 2 : 2605 Research Center Dr, Blacksburg, Virginia 24060 United States

Contract *no value* PO Number To Be Assigned

Line	Item	Catalog No.	Size/ Packaging	Unit Price	Quantity	Ext. Price	
1	Paper Mate Profile Ballpoint Pen, Retractable, Bold 1.4 mm, Black Ink, Translucent Black Barrel, Dozen	PAP89465	EA	15.99	6 EA	95.94	... ✓

^ **ITEM DETAILS**

Contract: *no value* Internal Note *no value*

- Click on the drop-down arrow up at the summary level of the line items.
- Users can then choose from one of the following options:
 - Remove Selected Items – removes any items checked off from this draft requisition
 - Remove All Items – removes all items from the draft requisition
 - Move to Another Cart – moves selected items to a different cart. This can be useful if users accidentally put orders to two different suppliers in to one cart.

11 Items

New River Office Supply Inc · 11 Items · 360.11 USD

^ **SUPPLIER DETAILS** Order Address 2 : 2605 Research Center Dr, Blacksburg, Virginia 24060 United States

Contract *no value* PO Number To Be Assigned

Line	Item	Catalog No.	Size/ Packaging	Unit Price	Quantity	Ext. Price	
1	Paper Mate Profile Ballpoint Pen, Retractable, Bold 1.4 mm, Black Ink, Translucent Black Barrel, Dozen	PAP89465	EA	15.99	6 EA	95.94	... ✓

^ **ITEM DETAILS**

Contract: *no value* Internal Note *no value*

Summary

- Add to Favorites
- Remove Selected Items
- Remove All Items
- Move to Another Cart
- Change Supplier
- Add to Draft Cart or Pending PR/PO
- Add to PO Revision
- Requires Sourcing
- Remove Requires Sourcing

Final Review

After selecting **Proceed to Checkout**, the shopping cart information will transfer over to a draft requisition. Users can still edit shopping cart information and will also add shipping and funding details.

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

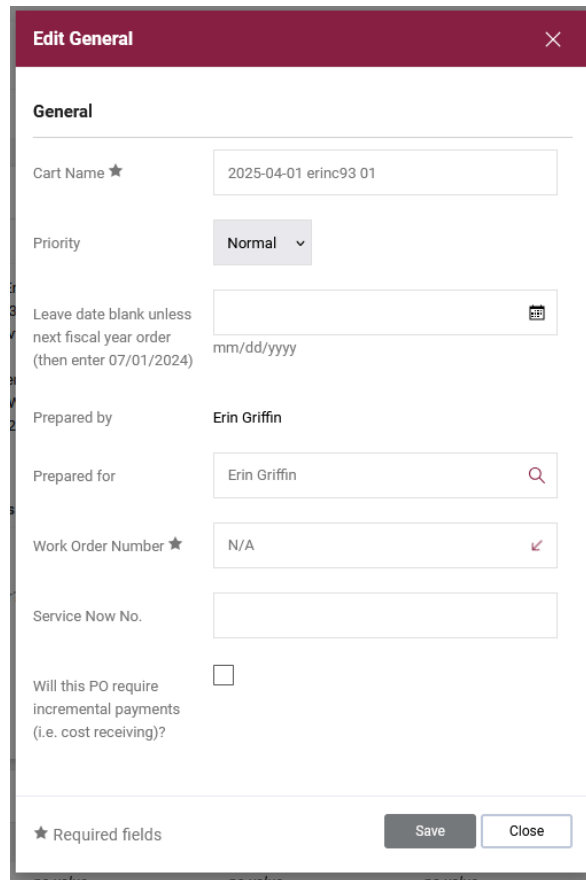
The screenshot displays a requisition draft for '199577269'. The main content is divided into four sections: General, Shipping, Billing, and Funding. The General section includes fields for Cart Name, Priority, Leave date, and Prepared by. The Shipping section includes Ship To and Delivery Options. The Billing section includes Bill To. The Funding section is a table with columns for Chart, Fund, OrgWF1, Account, UGType, Location, and Activity. A summary panel on the right, titled 'Draft', lists several required fields: Fund, OrgWF1, OrgWF2, FundWF, and Account, each with a red 'X' icon indicating they are missing. The total amount is 360.11 USD.

Chart	Fund	OrgWF1	Account	UGType	Location	Activity
U	no value	no value	no value	no value	15.99	no value

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. Select the pencil icon at the top right of each section to make any edits.

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.

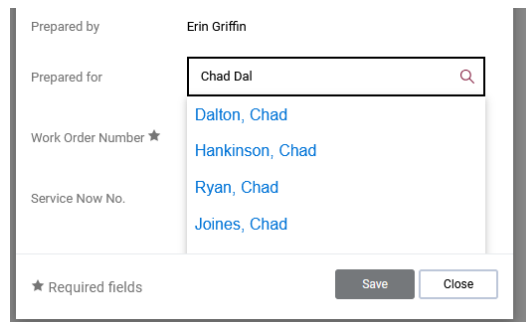


The screenshot shows the 'Edit General' form with the following fields and values:

- Cart Name ★: 2025-04-01 erinc93 01
- Priority: Normal
- Leave date blank unless next fiscal year order (then enter 07/01/2024): mm/dd/yyyy
- Prepared by: Erin Griffin
- Prepared for: Erin Griffin
- Work Order Number ★: N/A
- Service Now No.:
- Will this PO require incremental payments (i.e. cost receiving?):

At the bottom, there is a '★ Required fields' label, a 'Save' button, and a 'Close' button.

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



This screenshot shows the 'Prepared for' field with a search dropdown menu open. The dropdown lists the following suggestions:

- Chad Dal
- Dalton, Chad
- Hankinson, Chad
- Ryan, Chad
- Joines, Chad

The other fields in the form remain the same as in the previous screenshot.

- Possible choices will be displayed. Find the particular user from the list and click to select them.
- When complete, click **Save**.

Shipping

The Shipping section displays information regarding shipping and delivery data.

In this section, users can edit the ship to address that they want their order delivered to. Users can edit the Contact Name, Phone, and Email to customize this shipment to a specific recipient.

All default addresses saved in the user's profile will appear first, or users can search for an additional existing address in HokieMart. Only official Virginia Tech Campus addresses will be displayed in HokieMart.

Edit Shipping ✕

Ship To ★

CURRENT ADDRESS ↻

Contact Name ★ Add to my addresses

Phone

Email ★

Address Line 1

Address Line 2

Address Line 3

City

State

Zip Code

Country

0333 - Erin Griffin, +1 540-231-9028, erinc93@vt.edu, Procurement, North End Center Ste 2100, 300 Turner St NW, Blacksburg, VA 24061, United States ★

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

🔍 Results Per Page 10 ▾

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

Funding Information

The funding section is where the Requestor tells the system how we will fund the purchase. The fund and account are required fields. To edit or provide missing information, select the pencil icon and the **Accounting Codes** box will open.

The University Chart field will always default to "U."

Funding						
Chart	Fund	OrgWF1	Account	UGType	Location	Activity
U University Chart	no value ✖ Required	no value ✖ Required	no value ✖ Required	no value ✖ Required	no value	no value

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.

As users type in the funding box, a listing of available funds will be displayed from a drop-down list.

Edit Funding

Accounting Codes

Chart *	Fund *	OrgWF1 *	Account *	UGType *	Location	Activity
U - University Chart	procurement	No Value	Search	No Value	Search	Search

✖ Required

★ Required fields

Save Close

A listing of available funds will be displayed from a drop-down list. Users must click on the fund you wish to select when it appears beneath the funding box to accurately pull the fund in.

Edit Funding

Accounting Codes

Chart *	Fund *	OrgWF1 *	Account *	UGType *	Location	Activity
U - University Chart	121715	047000 - Procurement	Search	NA - Not Applicable	Search	Search

✖ Required

★ Required fields

Validated Save Close

Once the fund has been selected, the associated Org number and UG type will automatically be populated. Location and Activity codes are optional.

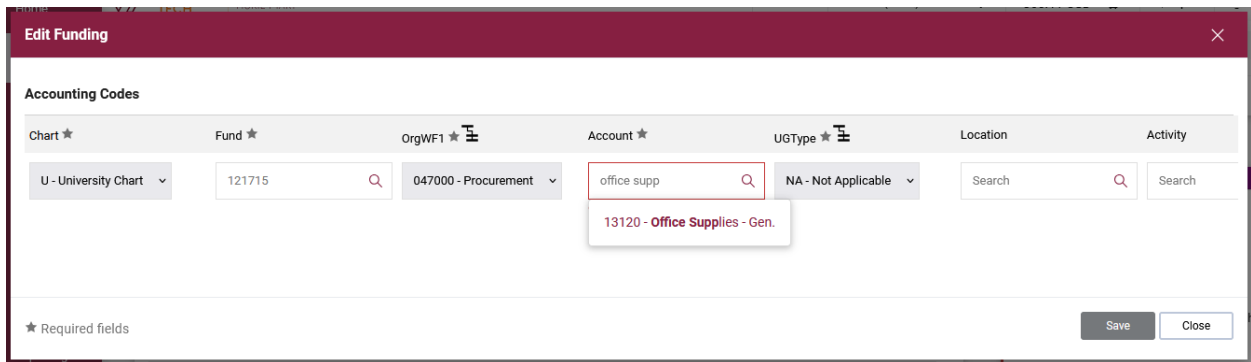
Account Code

Account codes are used to classify and categorize expenditures and can also route the requisition to additional necessary approvals. 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](#).

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](#).

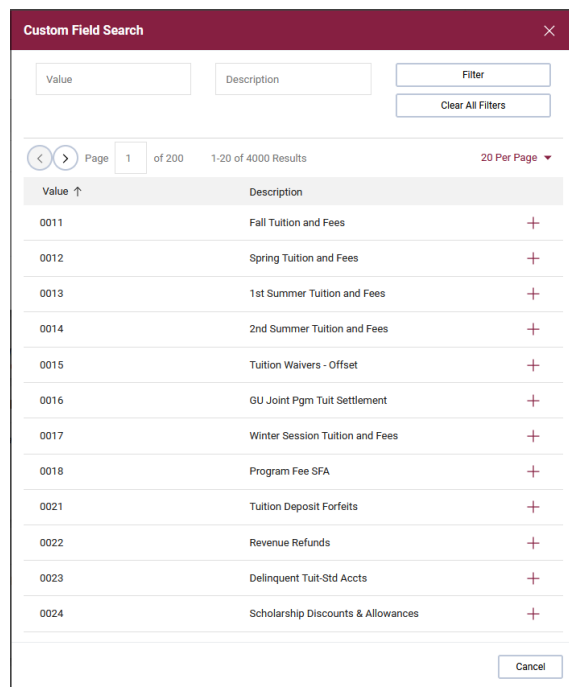
If account codes are stored in the user's profile, they will be displayed in a drop-down list by choosing **Select from profile value**. The appropriate selection may be made from this list.

If the account is not available from the user profile, users may need to search for the appropriate account code. To search for an account code, type in the search field. Users can type in a code or can search using key words such as "office supplies."



The screenshot shows the 'Edit Funding' window with the 'Accounting Codes' section. The 'Account' field contains 'office supp' and a search dropdown is open, displaying '13120 - Office Supplies - Gen.' as a result. Other fields include Chart (U - University Chart), Fund (121715), OrgWF1 (047000 - Procurement), UGType (NA - Not Applicable), Location, and Activity. A 'Save' button and a 'Close' button are visible at the bottom right.

Additionally, users can click on the magnifying glass to search through a listing within HokieMart.



The screenshot shows the 'Custom Field Search' window. It features a search interface with 'Value' and 'Description' input fields, a 'Filter' button, and a 'Clear All Filters' button. Below the search area, there is a table with the following data:

Value ↑	Description
0011	Fall Tuition and Fees
0012	Spring Tuition and Fees
0013	1st Summer Tuition and Fees
0014	2nd Summer Tuition and Fees
0015	Tuition Waivers - Offset
0016	GU Joint Pgm Tuit Settlement
0017	Winter Session Tuition and Fees
0018	Program Fee SFA
0021	Tuition Deposit Forfeits
0022	Revenue Refunds
0023	Delinquent Tuit-Std Accts
0024	Scholarship Discounts & Allowances

A 'Cancel' button is located at the bottom right of the window.

A listing of available funds will be displayed from a drop-down list. Users must click on the fund you wish to select when it appears beneath the funding box to accurately pull the fund in.

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. **External notes and attachments should not be used on a requisition generated from a punchout catalog.**

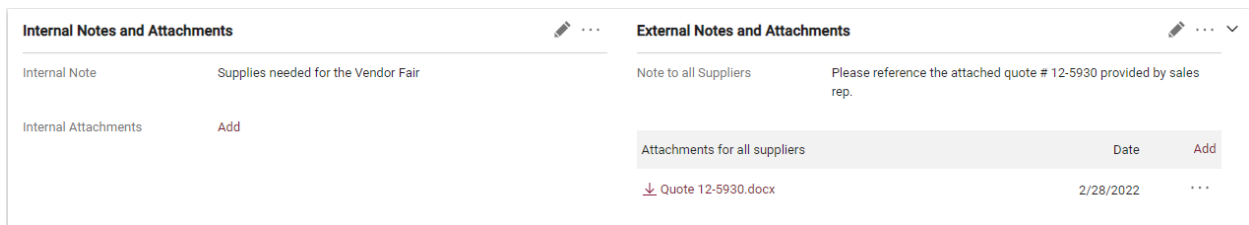
Internal notes and attachments remain internal to Hokiemark and are not viewable by the Supplier. Example uses are:

- 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:

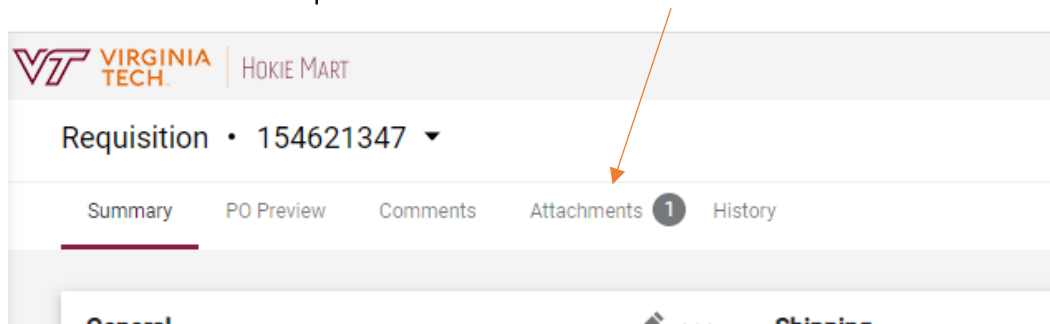
- To communicate delivery instructions to the supplier (“deliver to loading dock”).
- To attach a quote, you’re referencing in your product description.

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



The screenshot shows two side-by-side panels for a requisition. The left panel, titled "Internal Notes and Attachments", contains an "Internal Note" with the text "Supplies needed for the Vendor Fair" and an "Internal Attachments" section with an "Add" button. The right panel, titled "External Notes and Attachments", contains a "Note to all Suppliers" with the text "Please reference the attached quote # 12-5930 provided by sales rep." and an "Attachments for all suppliers" table. The table has columns for "Date" and "Add". One attachment is listed: "Quote 12-5930.docx" with a date of "2/28/2022" and a three-dot menu icon.

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



The screenshot shows the top navigation area of the requisition interface. It includes the Virginia Tech logo and "HOKIE MART" branding. Below that is the text "Requisition • 154621347" with a dropdown arrow. A navigation bar contains tabs for "Summary", "PO Preview", "Comments", "Attachments" (which is highlighted with a red underline and has a notification badge with the number "1"), and "History". An orange arrow points from the "Attachments" tab to the "Attachments" section in the previous screenshot.

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.

Submit the PR

After completing a final review the user is ready to click Submit PR for processing. This will send the requisition down through the workflow of approvals prior to becoming a purchase order.

The screenshot shows the Hokie Mart interface for a requisition with ID 199577269. The total amount is 360.11 USD. The 'Submit PR' button is highlighted with an orange box. The form is divided into three main sections: General, Shipping, and Billing. The General section includes details like Cart Name, Priority, and Leave date. The Shipping section includes Contact Name, Phone, Email, and Procurement address. The Billing section includes Accounts Payable, Email, and Or Mail To address. A Summary panel on the right shows the Total (360.11 USD) and a note about shipping, handling, and tax charges. Below the summary, there is a section titled 'What's next for my order?'.

Section	Field	Value
General	Cart Name	Yearly office supply order
	Priority	Normal
	Leave date	no value
	blank unless next fiscal year order (then enter 07/01/2024)	
Shipping	Ship To	
	Contact Name	Erin Griffin
	Phone	+1 540-231-9028
	Email	erinc93@vt.edu
Billing	Bill To	
	Accounts Payable	
	Email to:	vtinvoices@vt.edu
	Or Mail To:	

Summary

Total (360.11 USD)

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.

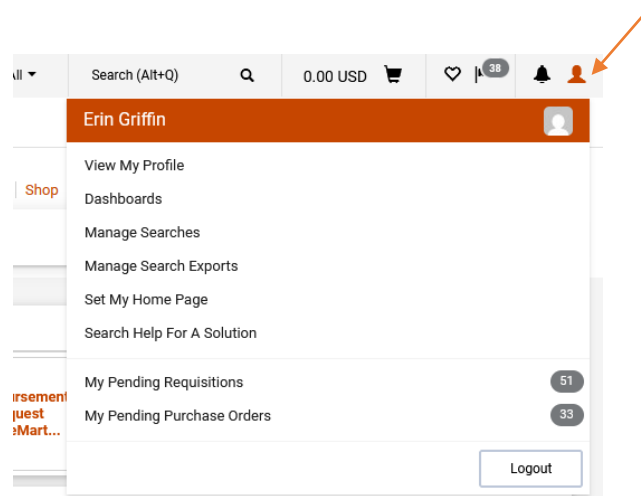
Subtotal	360.11
	360.11

What's next for my order?

Withdraw the PR

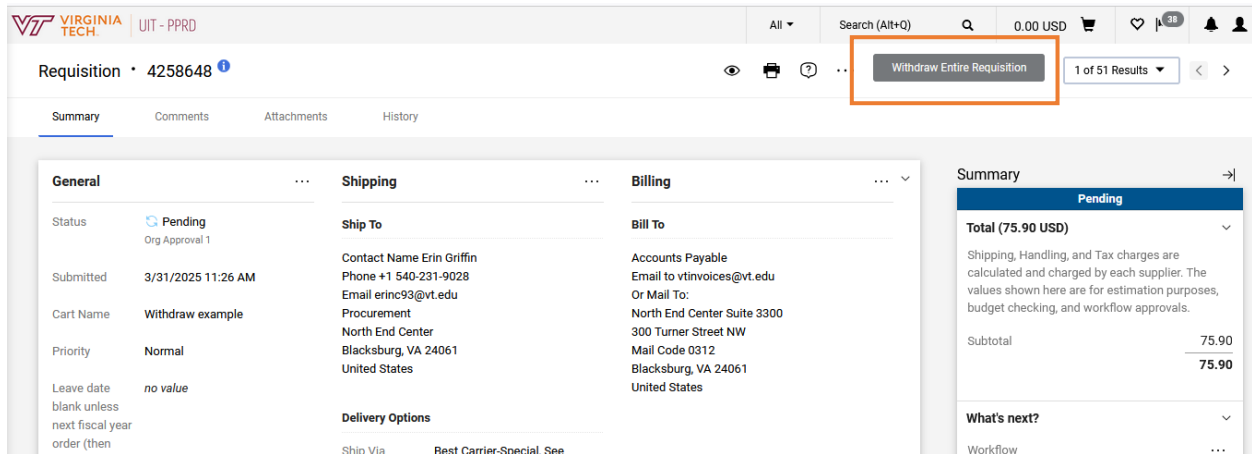
A Requestor can withdraw a PR at any stage in the workflow **prior to it becoming a PO**. Users may withdraw a requisition if they have additional information to add or changes to requisition details. Once a purchase order is issued, changes cannot be made unless it is over departmental delegation.

To locate a requisition once it is submitted, users can access a list of their pending requisitions by click on the User Icon on the top right hand side of HokieMart and selecting **My Pending Requisitions**.



Or users can query their requisition in the search bar using the requisition number.

Once the requisition has been located, users have the option to select **Withdraw Entire Requisition** in the upper right-hand corner.



The user will then need to include a reason for withdrawing. This will appear in the history of the 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.

OK
Cancel

Carrier-Special: See Comments

Status will be updated as “withdrawn.” If the user needs to edit the requisition information to resubmit, they can copy it to a new cart to make it editable again.

Requisition • 3401093 ▾

Summary
Comments 1
Attachments
History

General

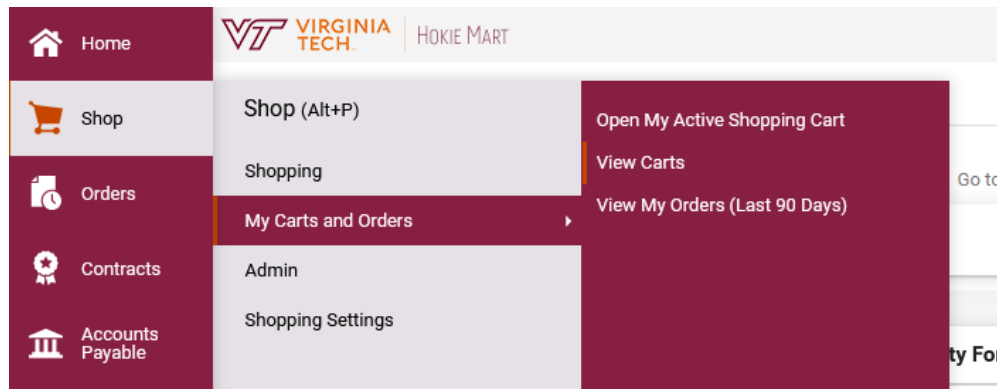
Status	← Withdrawn <small>(11/18/2021 9:00 AM)</small>
Submitted	11/18/2021 8:51 AM
Cart Name	2021-11-12 danielleh 01
Priority	Normal

Return PR to Requisitioner

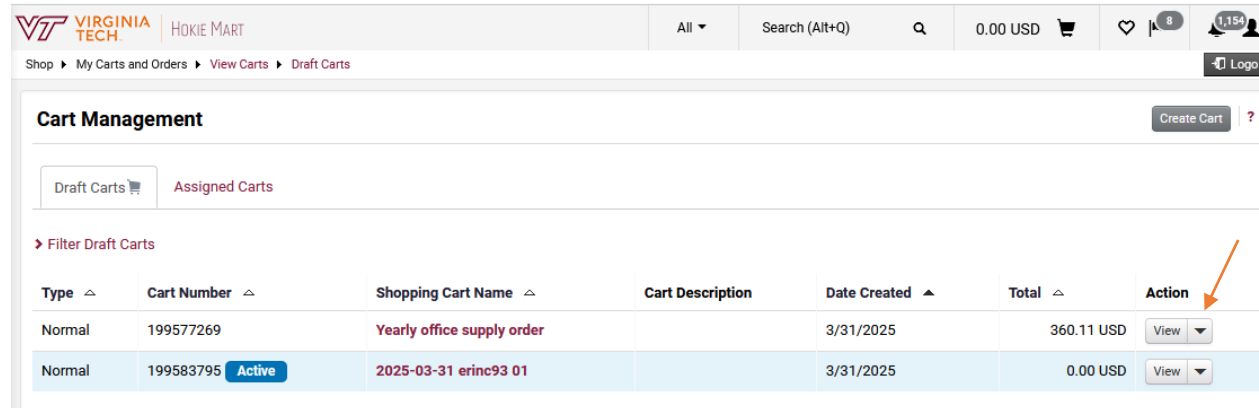
An Approver has the ability to return the Purchase Requisition (PR) to the Requestor (requisitioner) for any changes/updates that need to be made. This will allow the Approver to return rather than reject the PR.

After the Approver has assigned the requisition to themselves, reviewed the PR information, and returned it to the Requisitioner, 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.

Requestors can find draft carts by clicking on the Shop menu → My Carts and Orders → then View Carts.



Then activate the cart using the drop-down action arrow. 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

All requisitions flow through a Budget Authorization workflow step. A requisition may fail Banner budget authorization due to an invalid finance user, invalid accounts, or insufficient funds. Requisitions returned at budget authorization will return 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 and can be viewed in the History of the requisition.

Users can update the funding information or contact General Account genactg@vt.edu if access needs to be adjusted.

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 displays a requisition workflow interface. At the top, a purple header indicates the status is "Draft". Below this, a summary section shows a "Total (350.00 USD)" with a dropdown arrow. Underneath, a "Subtotal" of 350.00 is listed, followed by a bolded "350.00" at the bottom of the summary. The main section is titled "What's next for my order?" and shows the "Next Step" as "Org Approval 1". The "Approvers" listed are Griffin, Erin; Harlow, Danielle; and Sutphin, Bonnie. Below this, there is a "Workflow" section with a toggle for "Show skipped steps" (currently off) and a vertical timeline of steps: "Draft" (Active, Erin Griffin), "Budget Auth" (Future), "Org Approval 1" (Future), "Budget Auth_2" (Future), "Create PO" (Future), and "Finish" (Future). Each step in the timeline has a circular icon and a three-dot menu to its right.

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.

Cancelling 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:

- Contact the vendor and confirm with them that you are cancelling the PO.
- 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**.

When a cancelled receipt is submitted in HokieMart, it will export over to Banner along with all other receipts at 9am or 3pm each day. The cancelled receipt will trigger the automatic release of the encumbrance in Banner. If an encumbrance cannot be released for any reason, a Procurement Operations team member will comment on your PO with additional instructions.

Methods of Delivery

There are three methods of delivering purchase orders to vendors:

1. Computer to Computer (CXML).

original	2/17/2022 8:56:27 AM	System	PO Sent via CXML	200: OK
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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 Show less
original	12/20/2021 3:23:30 PM	System	PO Sent via fax	Out for fax delivery to +1 540-639- 6683

3. Email.

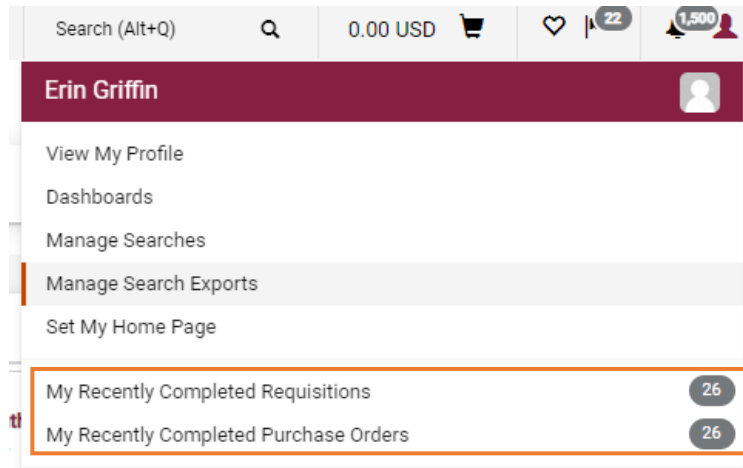
original	12/20/2021 3:23:30 PM	System	PO Sent via PDF attached email	becca@elevenwest.com
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Please note that the method for delivery is determined by the vendor at the time of their setup.

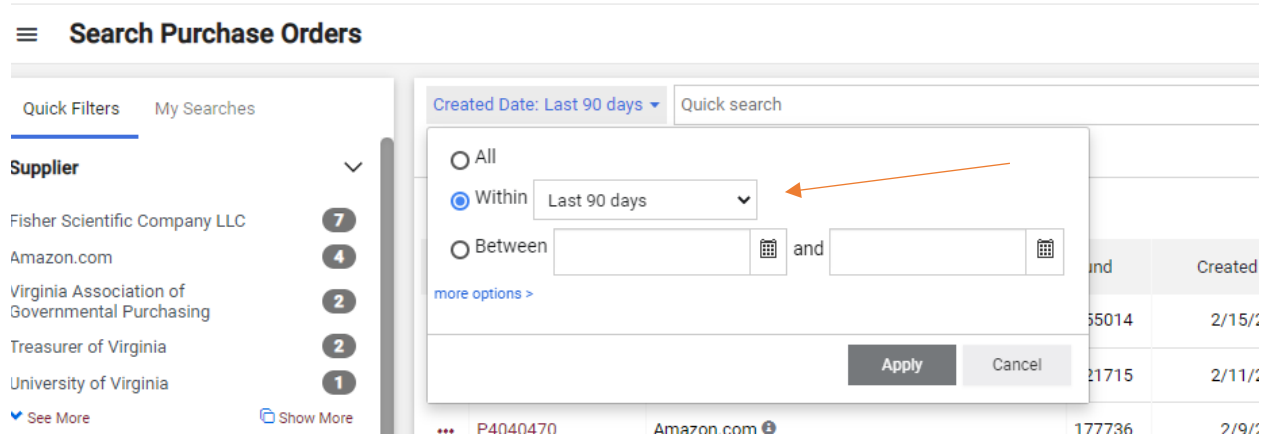
Punchout orders should always send cXML if HokieMart will Deliver is chosen on the requisition. All other order types will send Fax or Email, as determined by the vendor.

Viewing PRs and POs

Users can find a quick search of their recently completed requisitions and purchase orders from the last 90 days but using the saved searches in their 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	116276	1/31/2022 2:12:29 PM	Completed

Identifiers

- Contract Number
- Ext. Requisition Number
- Invoice Name
- Invoice Number(s)
- PO Number
- Packing Slip Number(s)
- Receipt Name
- Receipt Number
- Requisition Name
- Requisition Number
- Supplier Invoice Number(s)

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 **Shipping Information** **Billing/Payment**

General Information

PO/Reference No.
P4043600

Requisition Number
154170072 view | print

Ship To

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

Bill To

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

To obtain a copy of the PO the vendor would receive, click on the ... at the top right of the purchase order and select Print Fax Version. If the Requestor had selected User Will Deliver on their purchase order but needed to provide the vendor with a copy of the PO outside of the HokieMart system, they can use the Print Fax Version.

Purchase Order • Guy Brown Products • P4585555 Revision 0

Status Summary Revisions 1 Confirmations Shipments Receipts 1 Invoices 1

General Information **Shipping Information** **Billing/Payment**

General Information

PO/Reference No.
P4585555

Requisition Number
198960255 view | print

Ship To

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

Bill To

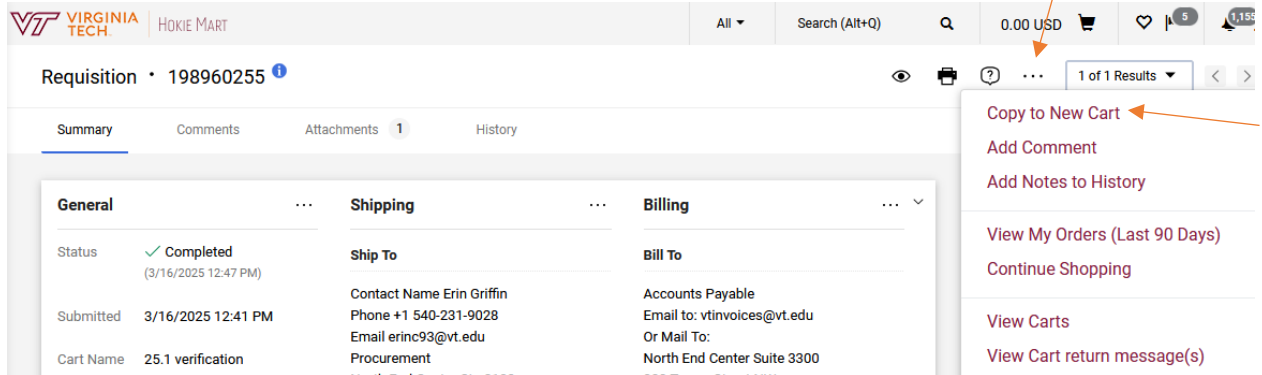
Accounts Payable
Email to: vtinvoices@vt.edu
Or Mail To:
North End Center Suite 3300
300 Turner Street NW
Mail Code 0312

Print Fax Version

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 can copy information you did not intend to bring to your new requisition. If you copy a requisition that was rejected for an error, that error will get copied.

Requisitions that were above departmental delegation or were generated from a punchout, 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 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. New Supplier can be used on the Non-Catalog form or on the Payment Request Forms. If a new internal supplier is needed on the Interdepartmental Service Request form, please contact General Accounting at genactg@vt.edu.

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

Item

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

254 characters remaining

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

Product Description *	Catalog No.	Quantity *	Price Estimate	Packaging
test		1	1.00	EA - Each

Complete the item information as usual and click **Save**.

Navigate to your order by clicking on the Cart icon on the upper right-hand corner of the page and then select View My Cart to edit the shopping cart information or click Checkout to proceed directly to the draft requisition.

22.21 USD

My Cart (2025-03-31 erinc93 01)

BIC Velocity Original Mechanical ... Quantity: 1 Price: 22.21 USD	View My Cart
	Checkout

22.21 USD

New supplier information goes in the Internal Notes. Click on the pencil icon to edit the section.

Internal Notes and Attachments	
Internal Note	no value
Internal Attachments	Add

It is also helpful to attach a quote, invoice, or any other relevant documentation, except a W9. A W9 is not needed at the time of requisition submission, but will be needed prior to payment being made.

W9's can be submitted to the Controller's office secure dropbox:

<https://controller.vt.edu/resources/accountspayable/dropbox.html>

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.

Example:

Edit Internal Notes And Attachments [X]

Internal Note

Internal Note

General Office Supply
123 Main St
Christiansburg, VA 24073
P: 540-382-1234
F: 540-382-5678
Email: sales@officesupply.com

880 characters remaining expand | clear

Save Close

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. In order for the purchase requisition to be routed to Procurement, choose **Best Vendor** as the supplier. When using Best Vendor, be sure to provide a detailed description of what you're purchasing and list an appropriate contact in your department for the Buyer to discuss your needs.

Best Vendor requisitions must be entered on a Non-Catalog form. Enter in your line-item information and best estimate of the price.

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

Add Non-Catalog Item [Close]

Existing Supplier

Best Vendor [Search] Best Vendor [Close]

Fulfillment Address [Dropdown] Distribution Methods [Dropdown]

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

Item [Dropdown]

Product Description *	Catalog No.	Quantity *	Price Estimate	Packaging
<input type="text"/> 254 characters remaining	<input type="text"/>	<input type="text"/>	<input type="text"/>	EA - Each [Dropdown]

★ Required fields

Save Save And Add Another Close

Complete the requisition.

Split Funding

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

1. The entire purchase (header level).
2. By line item.

Split Funding at the Header Level

Splitting at the header level means that the user wishes to split the entire amount of the requisition on to multiple funds.

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. Users may have to hover their mouse in the bottom right hand side of the Accounting Codes box to get the + symbol to appear.

Edit Funding [Close]

Accounting Codes

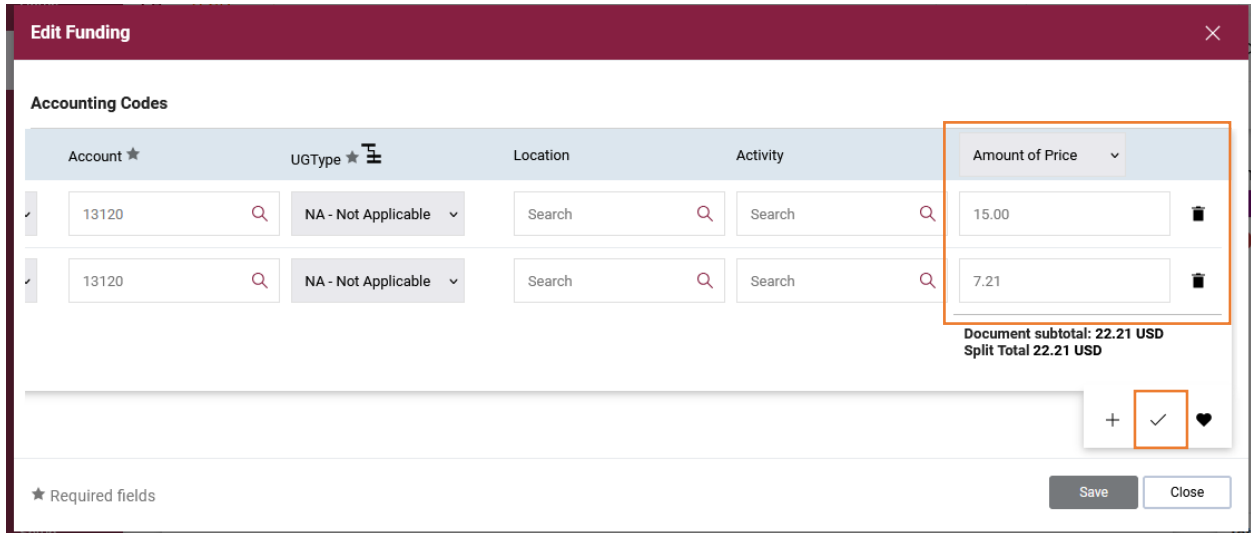
Chart ★	Fund ★	OrgWF1 ★	Account ★	UGType ★	Location
U - University Chart ▾	121715 🔍	047000 - Procurement ▾	13120 🔍	NA - Not Applicable ▾	Search
U - University Chart ▾	117865 🔍	047000 - Procurement ▾	13120 🔍	NA - Not Applicable ▾	Search

[+] [✓] [♥]

★ Required fields

Save Close

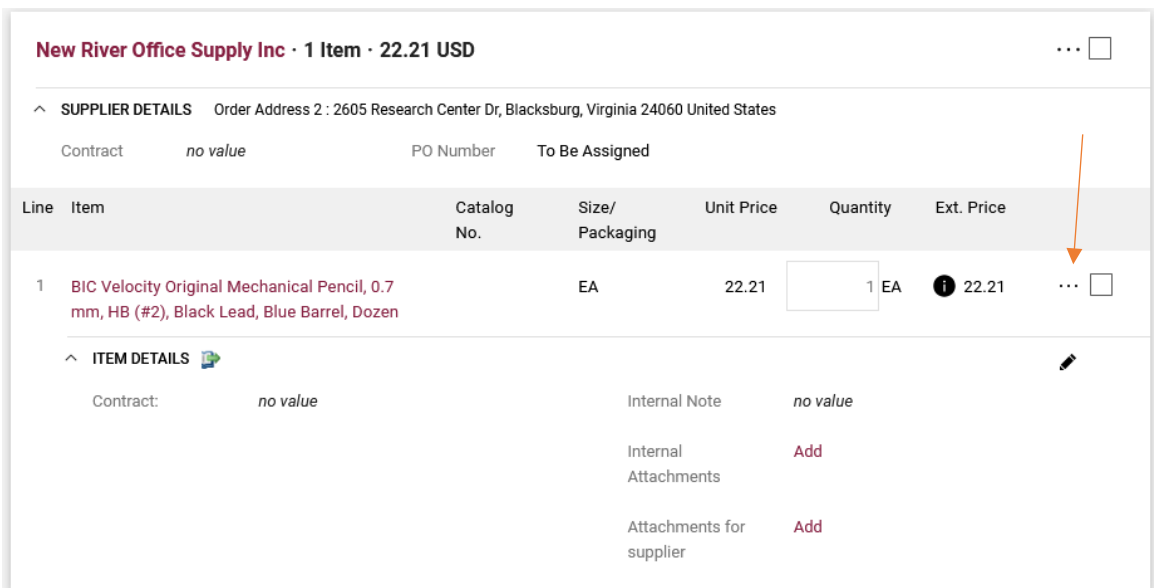
Users will need to enter in the distribution of cost on to the funds. You may need to scroll over to the right to view the split information. Once the distribution has been entered, click the check mark to allow the system to validate the distribution.



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

Split Funding at the Line-Item Level

Users may want to specify a different fund than is listed at the header level for a given line item or add a funding split specific to one line item. Click on the ... on the line item that requires a different funding source.



Select Accounting Codes

The screenshot shows a procurement system interface. On the left, there are sections for 'Procurement Method' (EBUY), 'Special Payment Terms', 'Special Freight Terms', and 'PO Clauses'. Below this is a '1 Item' section for 'New River Office Supply Inc' with a unit price of 22.21 USD. An 'Override' dropdown menu is open, listing options: Ship To, Delivery Options, Bill To, Accounting Codes (highlighted with an orange arrow), Buyer Checklist, Remove, Requires Sourcing, Remove Requires Sourcing, Add to Favorites, Move to Another Cart, Add to Draft Cart or Pending PR/PO, and Add to PO Revision.

The fund from the header level will default in the Accounting Codes section. To add another funding line, select the + symbol, or to change that fund, simply click in the field and enter in a different fund number.

The screenshot shows the 'Override Line 1: Accounting Codes' dialog box. It contains a table with columns: Chart, Fund, OrgWF1, Account, UGType, Location, and Activity. The first row shows 'U - University Chart', '116276', '099900 - Procurement Rebates & Fees', '13120', 'NA - Not Applicable', 'Search', and 'Search'. The second row shows 'U - University Chart', '121715', '047000 - Procurement', '13120', 'NA - Not Applicable', 'Search', and 'Search'. A '+' button is visible at the bottom right of the table area. A 'Save' button and a 'Close' button are at the bottom right of the dialog box.

Users will need to enter in the distribution of cost on to the funds. You may need to scroll over to the right to view the split information. Once the distribution has been entered, click the check mark to allow the system to validate the distribution.

Edit Funding

Accounting Codes

Account	UGType	Location	Activity	Amount of Price
13120	NA - Not Applicable	Search	Search	15.00
13120	NA - Not Applicable	Search	Search	7.21

Document subtotal: 22.21 USD
Split Total 22.21 USD

Save Close

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

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.

New River Office Supply Inc · 1 Item · 22.21 USD

SUPPLIER DETAILS Order Address 2 : 2605 Research Center Dr, Blacksburg, Virginia 24060 United States

Contract no value PO Number To Be Assigned

Line	Item	Catalog No.	Size/ Packaging	Unit Price	Quantity	Ext. Price
1	BIC Velocity Original Mechanical Pencil, 0.7 mm, HB (#2), Black Lead, Blue Barrel, Dozen		EA	22.21	1 EA	22.21

ITEM DETAILS

Contract: no value Internal Note: no value

Internal Attachments Add

Attachments for supplier Add

ACCOUNTING CODES Values have been overridden for this line

Chart	Fund	OrgWF1	Account	UGType	Location	Activity	Amount of Price
U University Chart	116276 eVA Fees	099900 Procurement Rebates & Fees	13120 Office Supplies - Gen.	NA Not Applicable	no value	no value	10.00 USD
U University Chart	121715 Procurement Operation	047000 Procurement	13120 Office Supplies - Gen.	NA Not Applicable	no value	no value	12.21 USD

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.

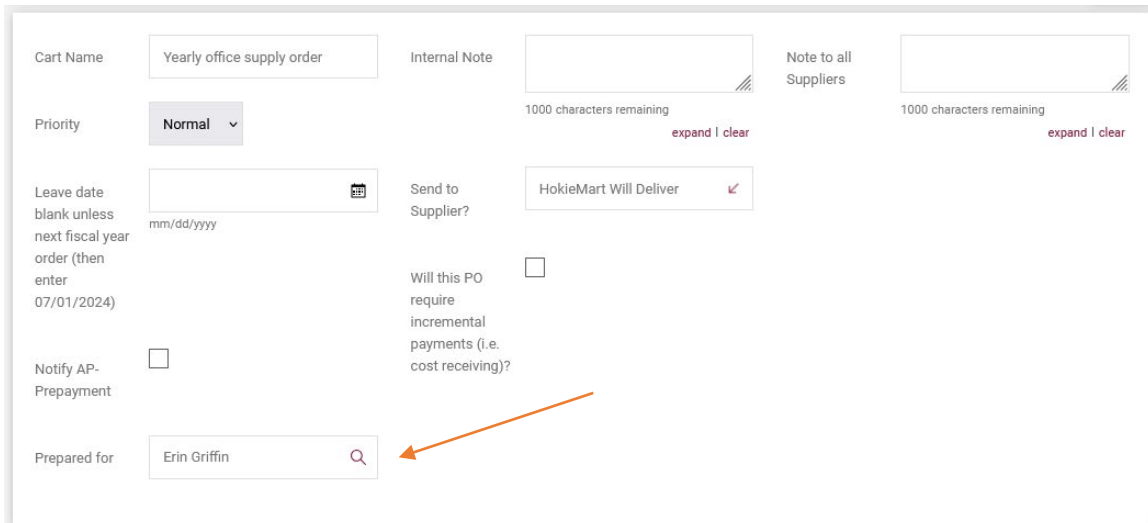
Shared Department (or On Behalf Of)

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. The Requestor entering in the order may not have access to all the funding sources that will be used. This allows the Requestor to proceed with entering in the order with assurance that the workflow will route the requisition to all applicable org level approvers for each funding source used.

****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.***

Requesters can change their requisition to be on behalf of Shared Department on either the Shopping Cart or draft Requisition document.

1. On the shopping cart, select the magnifying glass icon next to Prepared for.



The screenshot shows a shopping cart form with various fields. The 'Prepared for' field contains the name 'Erin Griffin' and a magnifying glass icon. An orange arrow points to this icon. Other fields include 'Cart Name' (Yearly office supply order), 'Priority' (Normal), 'Leave date' (07/01/2024), 'Notify AP-Prepayment' (checkbox), 'Internal Note', 'Note to all Suppliers', 'Send to Supplier?' (HokieMart Will Deliver), and 'Will this PO require incremental payments (i.e. cost receiving)?' (checkbox).

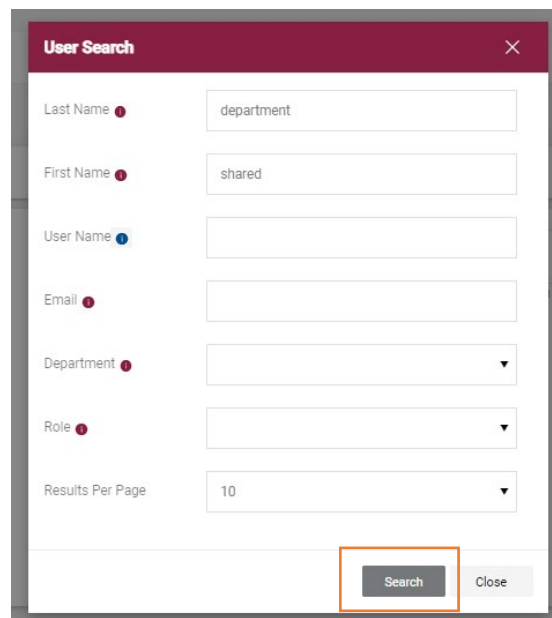
Search for the user “Shared Department.”

Last Name: **Department**

First Name: **Shared**

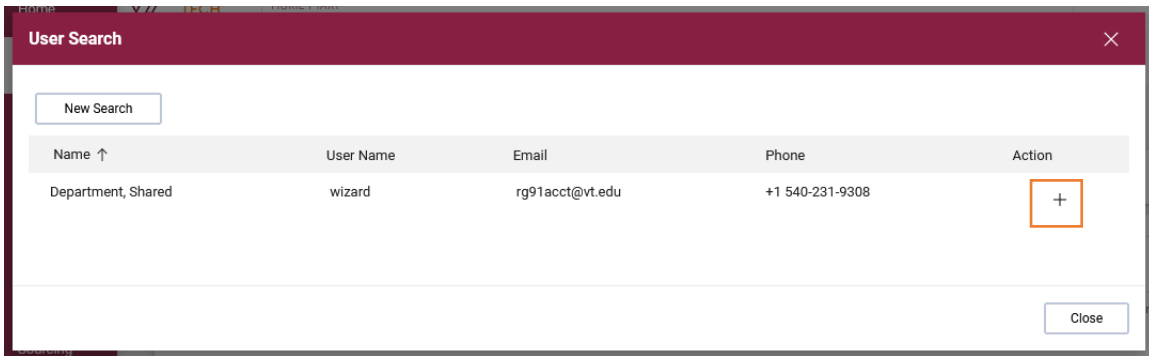
Then click **Search**.

Similarly, if you’re an On Behalf of Requestor entering the order on behalf of another user in your department, you would search for that user here.

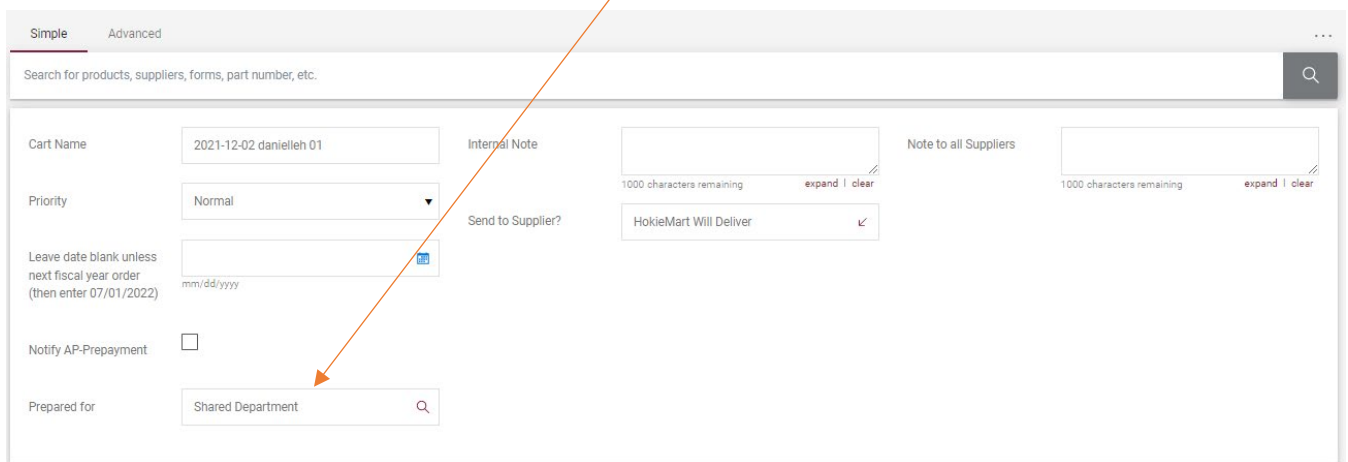


The screenshot shows a 'User Search' dialog box with the following fields: Last Name (department), First Name (shared), User Name, Email, Department (dropdown), Role (dropdown), and Results Per Page (10). A 'Search' button is highlighted with an orange box at the bottom right.

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.



2. The user can also edit the prepared for field on the draft requisition document. Before submitting the requisition, click the pencil icon in the General section to edit the field.

Cart Name	Yearly office supply order
Priority	Normal
Leave date blank unless next fiscal year order (then enter 07/01/2024)	no value
Prepared by	Erin Griffin
Prepared for	Erin Griffin
Work Order Number	N/A
Service Now No.	no value
Will this PO require incremental payments (i.e. cost receiving)?	X

Follow the steps outlined above to search for the Shared Department user.

Adding a Comment

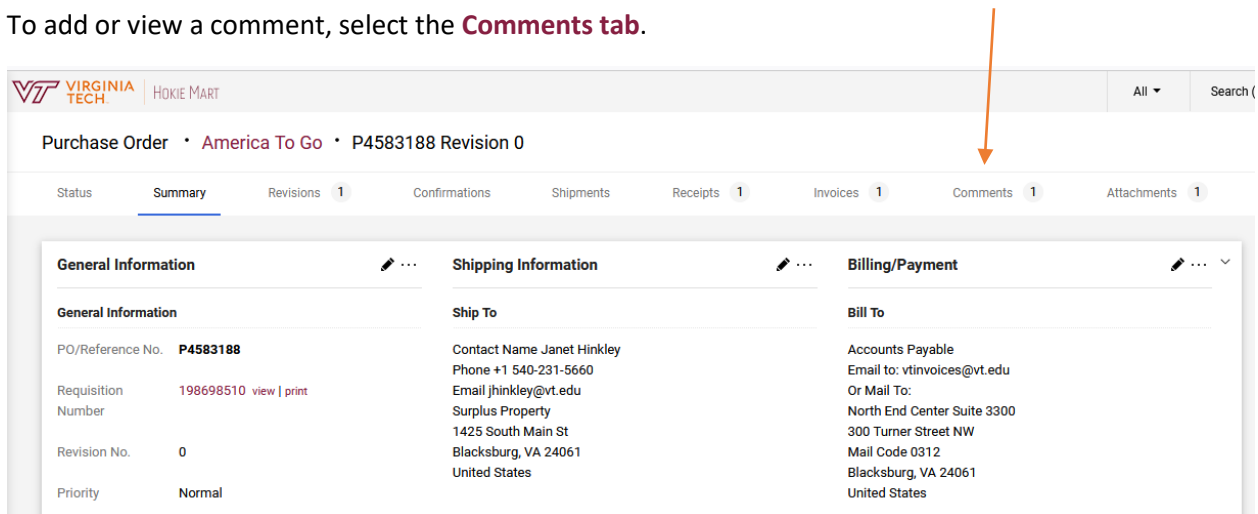
Adding Comments to PR or PO

HokieMart users have the ability to add comments to documents within HokieMart. If designated, notification of a comment will be transmitted via email to the designated recipients. Please note, you can only email a comment to someone who is set up as a user in HokieMart.

Examples of situations where a comment might be useful are:

- To provide Accounts Payable with clarifying information on the transaction.
- To add an attachment.
- To add a comment to a document after it has been completed.

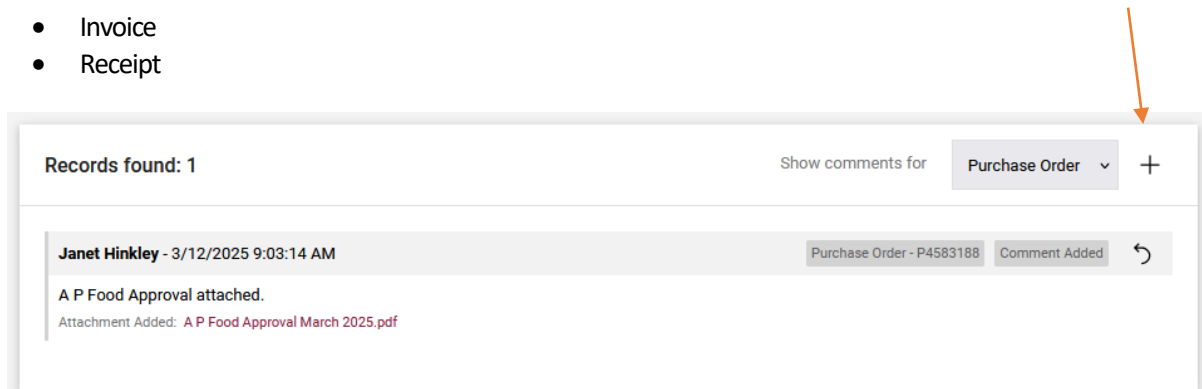
To add or view a comment, select the **Comments tab**.



The screenshot shows the HokieMart interface for a Purchase Order. The top navigation bar includes the Virginia Tech logo and 'HOKIE MART'. Below the header, the document title is 'Purchase Order · America To Go · P4583188 Revision 0'. A horizontal menu contains several tabs: Status, Summary (selected), Revisions (1), Confirmations, Shipments, Receipts (1), Invoices (1), Comments (1), and Attachments (1). An orange arrow points to the 'Comments' tab. Below the tabs, there are three main sections: 'General Information', 'Shipping Information', and 'Billing/Payment', each with a dropdown menu icon. The 'General Information' section shows PO/Reference No. P4583188, Requisition Number 198698510, Revision No. 0, and Priority Normal. The 'Shipping Information' section shows Contact Name Janet Hinkley, Phone +1 540-231-5660, Email jhinkley@vt.edu, and address 1425 South Main St, Blacksburg, VA 24061, United States. The 'Billing/Payment' section shows Accounts Payable, Email to: vtinvoices@vt.edu, and address 300 Turner Street NW, Blacksburg, VA 24061, United States.

The drop-down menu will allow user display comments from different documents associated with the transaction. This will default to showing comments just for the document type you are currently on.

- All
- Requisition
- Purchase Order
- Invoice
- Receipt



The screenshot shows a close-up of the 'Comments' section. At the top, it says 'Records found: 1'. To the right, there is a 'Show comments for' dropdown menu currently set to 'Purchase Order' with a plus sign icon to its right. An orange arrow points to this plus sign. Below this, a comment is displayed: 'Janet Hinkley - 3/12/2025 9:03:14 AM'. The comment text is 'A P Food Approval attached.' and 'Attachment Added: A P Food Approval March 2025.pdf'. To the right of the comment text are two buttons: 'Purchase Order - P4583188' and 'Comment Added' with a refresh icon.

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

The screenshot shows the 'ADD COMMENT' interface for a 'Purchase Order'. It includes a text area for the comment, a recipient selection dropdown, and an attachment section. Three callout boxes provide instructions:

- Callout 1:** Type desired comment. (Points to the text area containing 'Services were delivered. Please receive this PO.')
- Callout 2:** Add recipient for the comment or select one of the recipients already listed. (Points to the recipient dropdown showing 'Janet Hinkley (Prepared by, Prepared for) <jhinkley@vt.edu>').
- Callout 3:** Include attachment to the comment (optional). (Points to the 'Attach file (optional)' section with 'File' and 'Link/URL' options and a 'Choose File' button.)



When satisfied with comment select the check mark symbol. Please note, comments cannot be deleted once they are added to a purchase order. Comments can be viewed by any user who has access to view that document in HokieMart.

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.

- Order for one fixed asset (i.e. one SCHEV number):
 - ETF=2080640151
- 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
- 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.

External Notes and Attachments  ... 

Note to all Suppliers ETF=2080640151,2080640171,2080640211

Attachments for all suppliers [Add](#)

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 prior to receipt of goods and/or services purchased on a PO.

Although it is not a best practice of the university to prepay for goods and/or service, there are times a vendor must be paid in advance, such as a partial deposit payment for equipment that must be manufactured.

Prepayments for things such as memberships or honorariums where the check is to be presented by the department directly to the vendor on the day of the event can be submitted on the Payment Request forms. See the [Payment Request Forms User Guide](#) for more information.

To indicate that your order requires prepayment, select **Notify AP-Prepayment**. Additionally, you must also check off the incremental payments field. All prepayments should be paid using cost receipts.

Shopping Cart • Shopping Cart

The screenshot shows a shopping cart interface with the following fields and options:



- Cart Name: Yearly office supply order
- Internal Note: (empty)
- Note to all Suppliers: (empty)
- Priority: Normal
- Leave date: (empty)
- Send to Supplier: HokieMart Will Deliver
- Will this PO require incremental payments (i.e. cost receiving)?
- Notify AP-Prepayment
- 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 section.

Requisition • 154621347 ▾

Summary PO Preview Comments Attachments History

General  ... **Shipping**  ...

Cart Name	2022-02-23 erinc93 01	Ship To	
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	

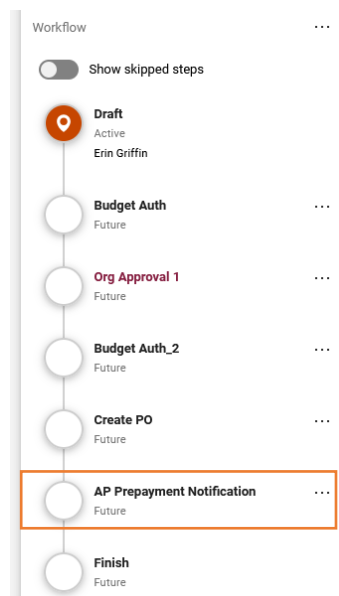
Delivery Options

Ship Via	Best Carrier-Special, See Comments
Send to Supplier?	User Will Deliver Requisitioner must deliver PO to supplier

Notify AP-Prepayment

Supporting documentation stating the prepayment terms from the vendor will need to be attached to the requisition electronically as an Internal Attachment.

A workflow step will appear on your requisition to notify Accounts Payable to make a prepayment. Receiving should be completed as soon as the PO is issued in order to initiate payment.



A workflow step will appear on your requisition to notify Accounts Payable to make a prepayment. Receiving should be completed as soon as the PO is issued in order to initiate payment.

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%. If additional prepayment is needed, please contact **Accounts Payable**.
- AP cannot pay from a quote or proforma invoice.
- AP must have documentation from the company stating prepayment or deposit is required.

Payment Request Forms

Payment Request Forms are utilized to streamline the processing of payments that do not require a purchase order. Separate forms have been created to process each type of transaction.

- Honoraria
- Revenue Refunds
- Utilities
- Non-PO Payment Requests

Each of these categories will reference the appropriate payment category as defined by Procurement.

Departments will enter their payment information on the applicable Payment Request Form and attach an invoice or appropriate information to substantiate payment to the supplier in HokieMart. This documentation will route through Accounts Payable for review and approval.

Once approved, the Payment Request Form is converted to an e-invoice that will route through existing organization level approvals. Once completed, the e-invoice will integrate to Banner Finance for disbursement.

It is important to note that there will be no receiving function associated with payment forms. The items processed on these forms will not create an encumbrance, and the associated invoice does not need to be sent to vtinvoices@vt.edu.

Payment Request Form Types

There are four payment request forms in HokieMart. Each form can be used to process payment requests for specific transactions that are exempt from competition under state procurement policies. A list of procurement exemptions and definitions is located at <https://www.procurement.vt.edu/departments/non-po-payment.html>.

It is imperative that the appropriate payment category be selected. Only payments that fall into these categories can be processed on these forms as they do not require formal procurement processes and can be processed in an expedited manner. Accounts Payable will review the selected payment category to ensure compliance before approving a request for payment. Requests that do not fall into these categories will be rejected and should go through the purchase requisition process on the non-catalog form.

Payment Request Form Processing

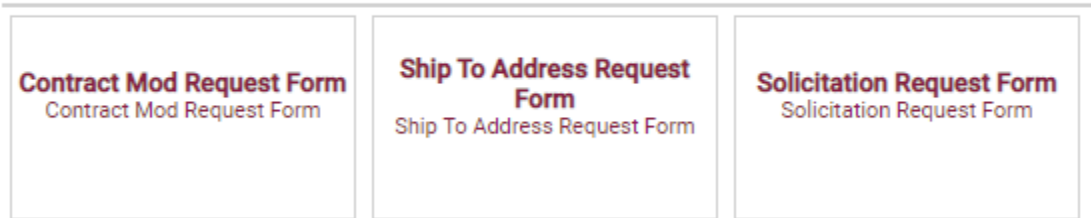
For specific, step-by-step instructions on entering invoices through the Payment Request Form in HokieMart, please view the [Payment Forms User Guide](#).

Procurement Request Forms

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

- Ship to Address Request Form.
- Contract Mod Request Form.
- 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

The screenshot shows the 'Instructions' tab selected in the left-hand navigation menu. The main content area displays the following information:

- Ship To Address Request ...** (Title)
- Form Number** 4985345
- Purpose** Generic Request
- Status** Incomplete
- Instructions** (Section Header)
- Request Actions (dropdown) | History (?)
- 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.
- Please note this must be an affiliated Virginia Tech address.*
- Next > (button)

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


The screenshot shows the 'Attachments' tab selected in the left-hand navigation menu. The main content area displays the following information:

- Ship To Address Request ...** (Title)
- Form Number** 4985345
- Purpose** Generic Request
- Status** Incomplete
- Attachments** (Section Header)
- Request Actions (dropdown) | History (?)
- Please add your attachments below.*
- Add Attachment (button)
- Previous (button) | Save Progress (button) | Next > (button)

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

- 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? *
<input type="text"/>

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

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.

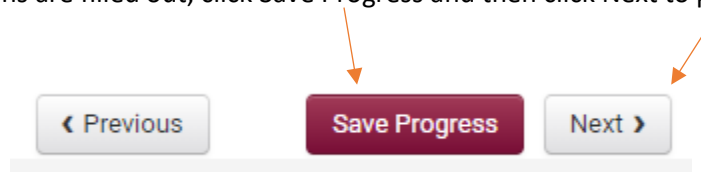
▼ Reason for Request

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 [x]

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

Form Approvals

Show skipped steps
Orientation: Horizontal

Submitted 12/10/2021 8:46 AM → **Form - Generic Approval Proc** (Active) → Finish

View approvers 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 into 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

Contract Mod Request Form		Instructions	Request Actions ▾ History ?
Form Number	635209	The purpose of this form is to notify Procurement of a modification to an existing contract with a Virginia Tech Vendor.	
Purpose	Generic Request		
Status	Incomplete		
Instructions			
Details	✓		
Attachments	✓		
Questions	✓		
Review and Submit			
Discussion			
Form Approvals			
			Next ▶

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		Details		Request Actions	History	?
Form Number	635209	Form Name *	Contract Mod Request Form			
Purpose	Generic Request	Purpose	Generic Request			
Status	Incomplete	Template Title	Contract Mod Request Form			
Instructions		Form Type	Contract Mod Request			
Details ✓						
Attachments ✓						
Questions ✓						
Review and Submit						
Discussion						
Form Approvals						

★ 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		Attachments		Request Actions	History	?
Form Number	635209	<i>Please add your attachments below.</i>				
Purpose	Generic Request	Add Attachment				
Status	Incomplete					
Instructions						
Details ✓						
Attachments ✓						
Questions ✓						
Review and Submit						
Discussion						
Form Approvals						

◀ 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 IT Procurement 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.

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

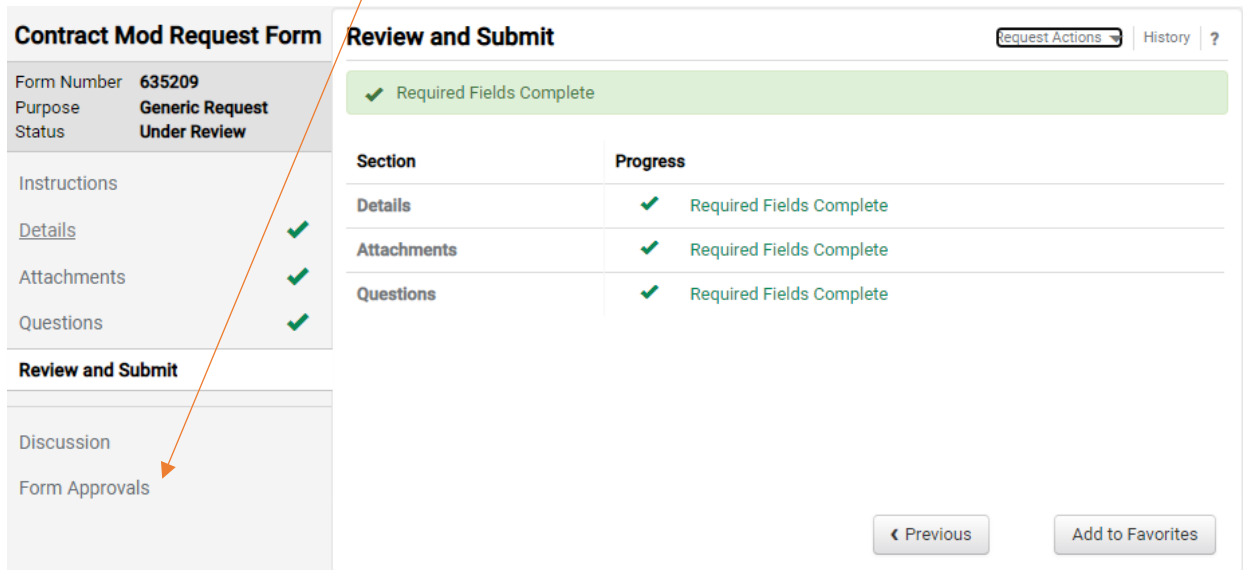
If any of the required fields were not completed, you can use the menu on the left-hand side to navigate back to the tab that needs to be fully completed before submission.

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 links: "Instructions", "Details" (with a green checkmark), "Attachments" (with a green checkmark), "Questions" (with a green checkmark), "Review and Submit" (bolded), "Discussion", and "Form Approvals" (with an orange arrow pointing to it). The main content area is titled "Review and Submit" and includes a "Request Actions" dropdown, "History", and a help icon. A green banner at the top says "Required Fields Complete". Below is a table showing progress for different sections.

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

At the bottom right of the main area are "Previous" and "Add to Favorites" buttons.

Once approved, you will receive an email from a Procurement Buyer confirming the changes have been added into 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're needing. Then click **Open Request Form**.

Initiate Sourcing Request

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 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

Instructions

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.

◀ Previous Next ▶

Attachments

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	

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 [★] 🔍

Enter the name of your department.

Who will be the point of contact for this solicitation in your department? [★]

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) [★]

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 [★]

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

Do you have suggested Vendors? [★] 🔍

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 - [Edit](#)

Historical Unit Price USD

Target Price USD

* Required

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

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.

Section	Progress
Details	✓ Required Fields Complete
Attachments	✓ Required Fields Complete
Questions	✓ Required Fields Complete
Product Line Items	✓ Required Fields Complete
Service Line Items	✓ Required Fields Complete
Suppliers	✓ Required Fields Complete

Form Approvals

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

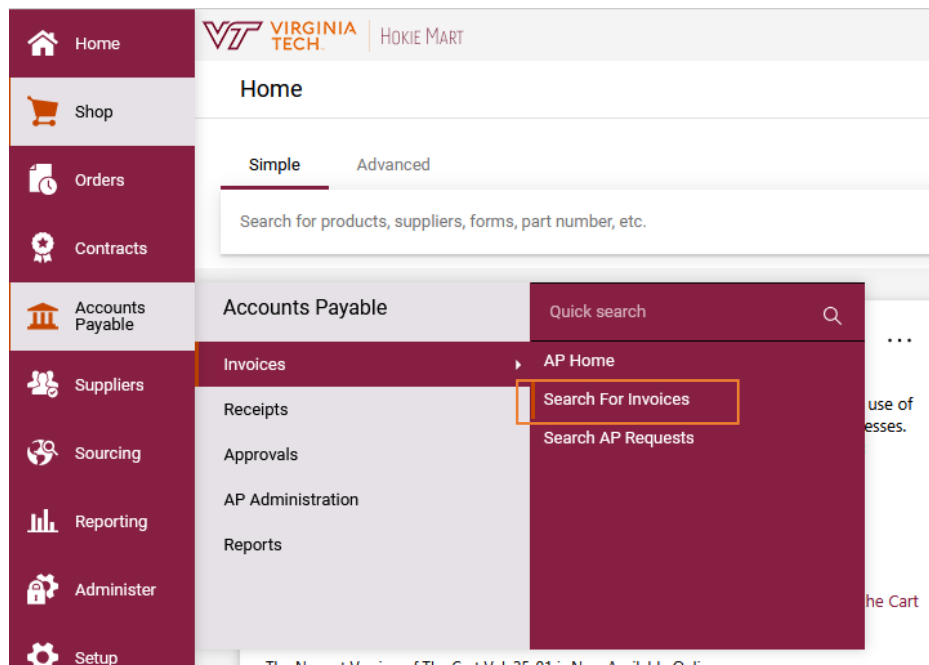
HokieMart provides the ability to process vendor invoices within the system. There are various methods currently utilized to generate invoices directly in to HokieMart:

- **cXML** – computer to computer transmission of invoices. Most punchout suppliers provide invoices in this way.
- **Portal** – vendors have the ability to set up a billing portal where they log in to HokieMart and submit an invoice directly against a purchase order document
- **OCR** (optical character recognition) – technology software that converts scanned invoice documents in to e-invoices in HokieMart
- **Automatic invoice creation** – some qualifying transactions will automatically flip in to an e-invoice once the purchase order is created or payment request form is approved
- **PO Flip** – manual entry of invoices by VT Accounts Payable staff

Many invoices are available for viewing in HokieMart. There are two ways to search and view e-Invoices.

Option #1:

When the PO number is not known or user wishes to view multiple eInvoices, navigate to Accounts Payable → Invoices → and Search for 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.

Purchase Order • P4003013 Revision 0 ▾

Invoice No. ↓	Supplier Invoice No.	Invoice Date	Due Date	Invoice Type	Payment Status	Invoice Total	Invoiced By
E0654466	5077650000	11/16/2021	12/6/2021	Invoice	Payable	44.75 USD	System

Line No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Invoice Qty/Cost	Status
1	Staples 30% Recycled Copy Paper 8.5" x 11", 20 lbs., White, 5000 Sheets/Carton (112350/461757)	492072	44.75 USD	1 CT	44.75 USD	1 / 44.75 USD	Net Invoiced

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 ▾



General	Addresses	Note/Attachments
Invoice Type: Invoice	Remit To	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

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

HokieMart	Questions concerning HokieMart functions (rejected/pending PR's and PO's), appropriate form usage and procedures, vendor receipt of orders: HokieMart@vt.edu
Accounts Payable	Questions concerning the payment of invoices, encumbrances, expenditures: 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: genactg@vt.edu
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: <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>