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 procurement system for the provision of goods, services, insurance and non-capitol 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 purchase goods and services, and make payments to vendors. This can be accomplished by submitting a requisition or a payment request form to generate an e-invoice. After a requisition or payment request form is submitted, they flow through an approval process to generate a Purchase Order or 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.

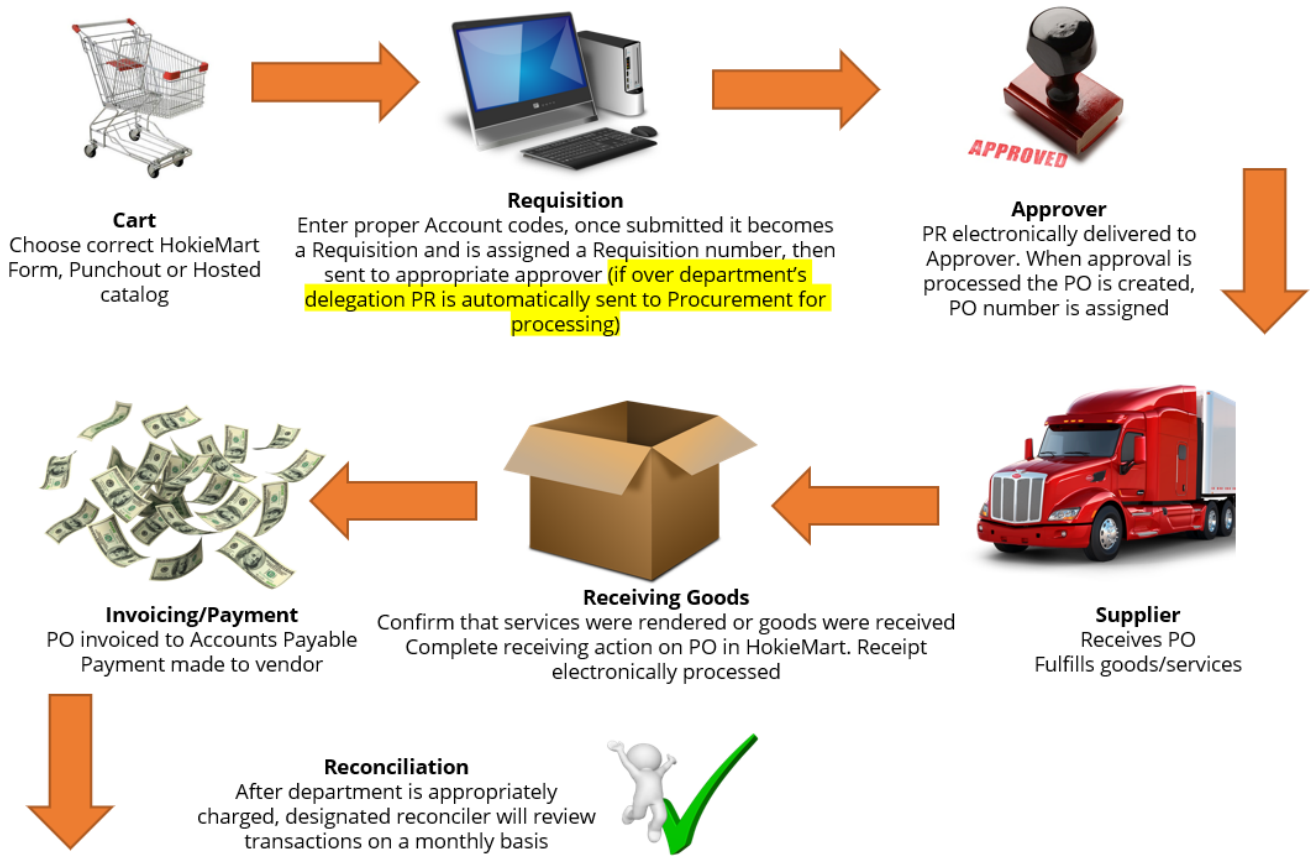
HokieMart provides a central receiving process for the entire university. Once goods or services are delivered, a Receiver will go into the purchase order to complete a receiving action. Along with a copy of the PO and invoice, this receiving action provides Accounts Payable with a 3-way match to issue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

Departments continue to receive invoices for direct payments and university contract transactions. Payment Request Forms require no receiving.

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:

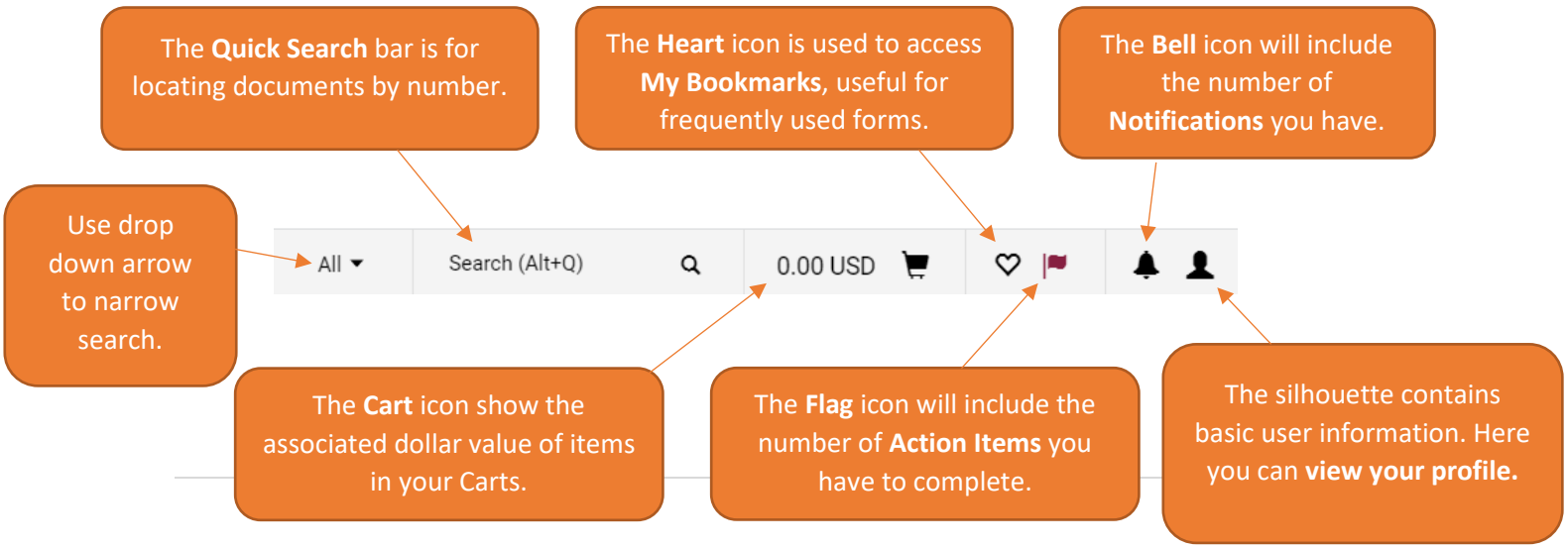
- Requestor
- Approver
- Receiver

HokieMart Workflow



Navigation

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



The **Home** icon brings you back to the main shopping page.

The **Shop** icon provides you access to the shopping options and carts.

The **Orders** icon allows you to search for documents including requisitions, purchase orders and invoices.

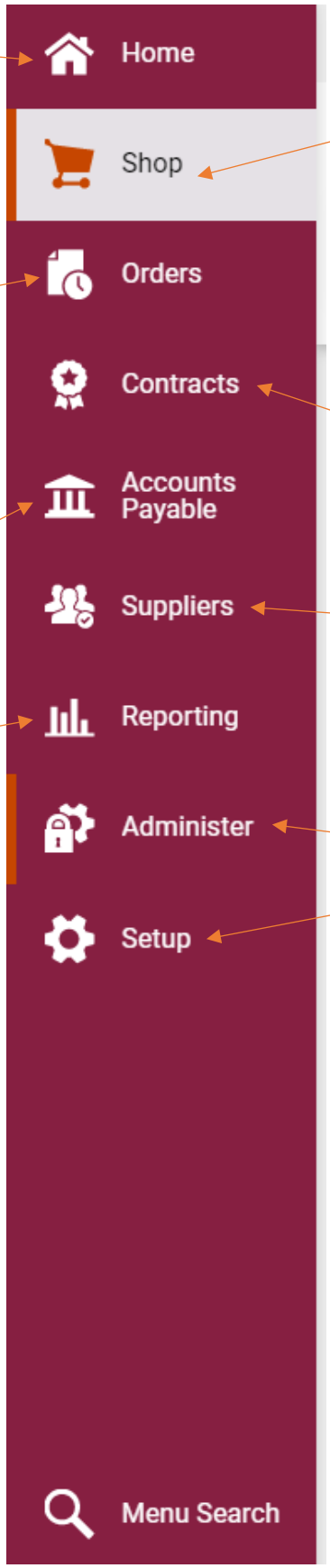
The **Contract** icon allows you to view University Contracts.

The **Accounts Payable** icon allows you to view invoice information.

The **Suppliers** icon allows you to search for current suppliers.

The **Reporting** icon allows you access to reports based on role.

Administer & Setup only available to HokieMart administrators.



Shopping Home Page

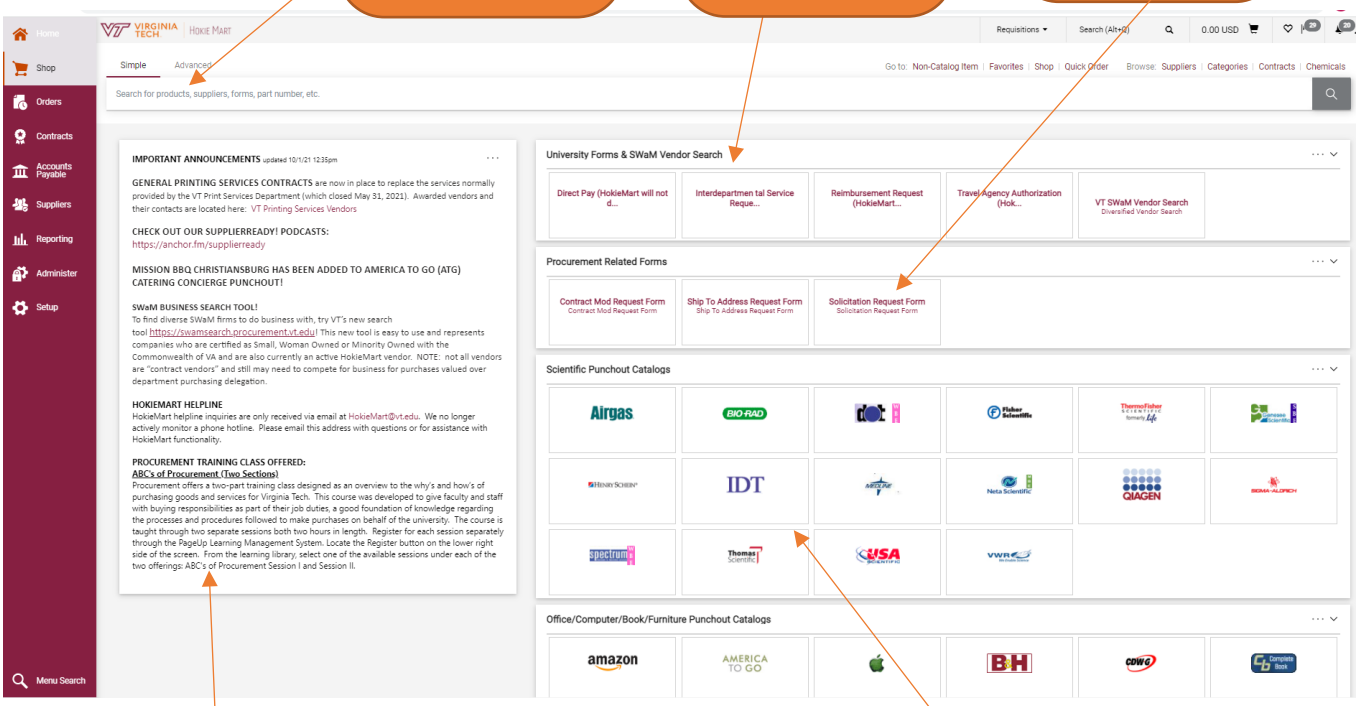
The **Search Tool** you can search for products, suppliers, forms and part numbers, etc.

University Forms

Payment Request, ISR, Travel Auth, VT SWaM Vendor Search.

Procurement Forms

Ship to Address Request Form, Contract Mod Request Form, Solicitation Request Form.



The **Organization Message** displays announcements from Procurement.

The **Featured Suppliers** Shows tiles of Punchout and Hosted catalog suppliers.

Searching for Carts, Orders and Documents

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

(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.

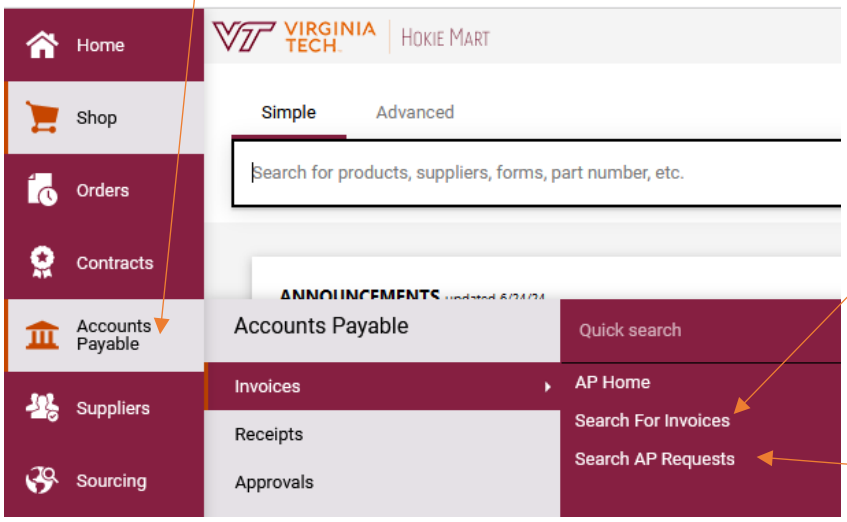
(3) Open **View Carts** to see both **Active Carts** and **Carts Assigned.**

(4) Open **View My Orders** to view orders you have created in the past 90 days.

(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.

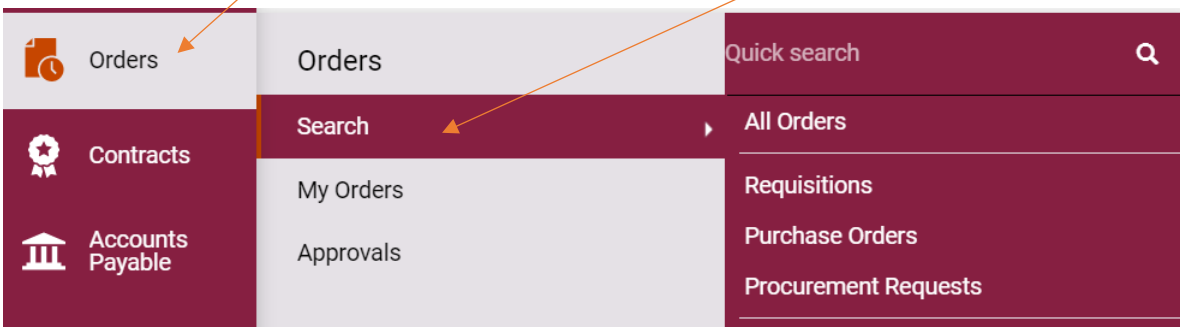
(3) Select **Search AP Requests** to see your departments Payment Request Forms.



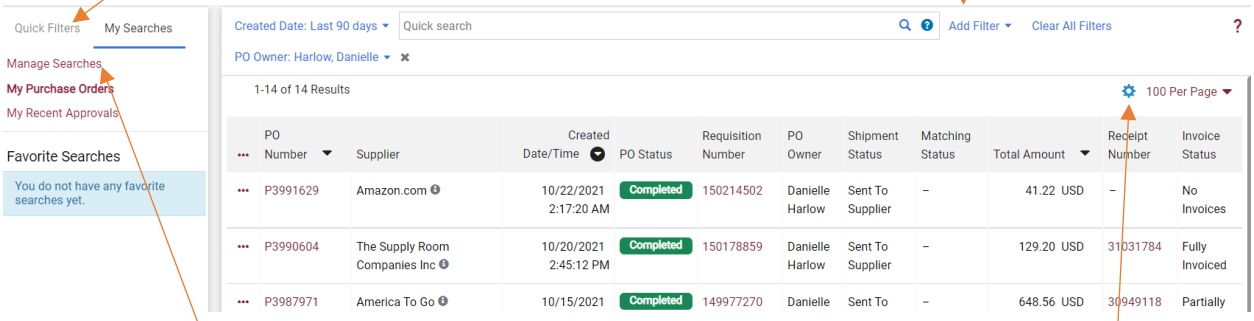
Orders Search

(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).



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

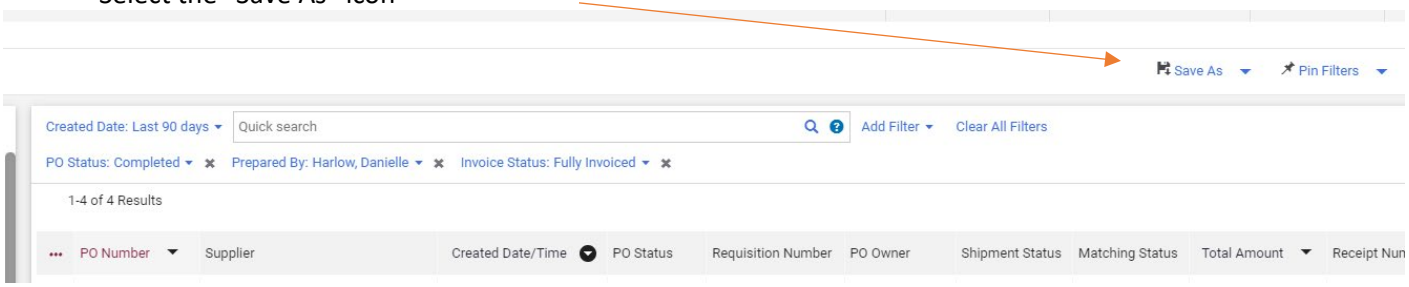
Use the Gear on the right side to create a custom filter and reorder columns.

Saving a Search

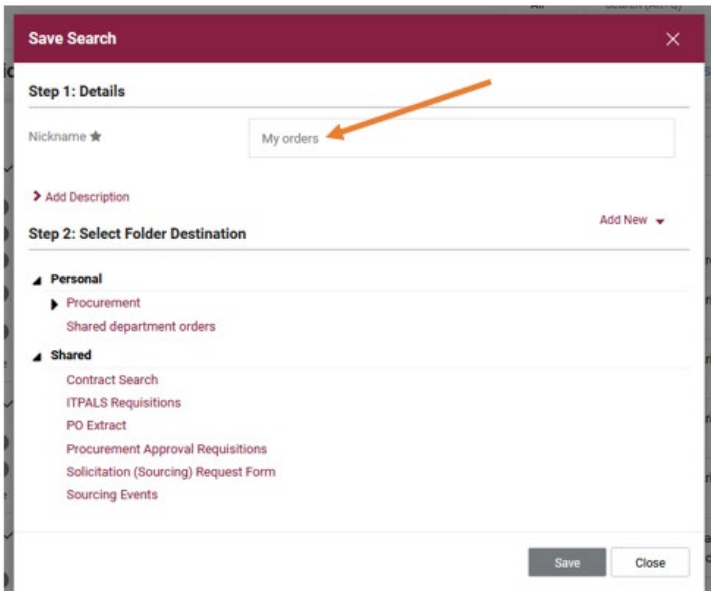
Follow the steps below to save a search once you have applied unique filters.

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.

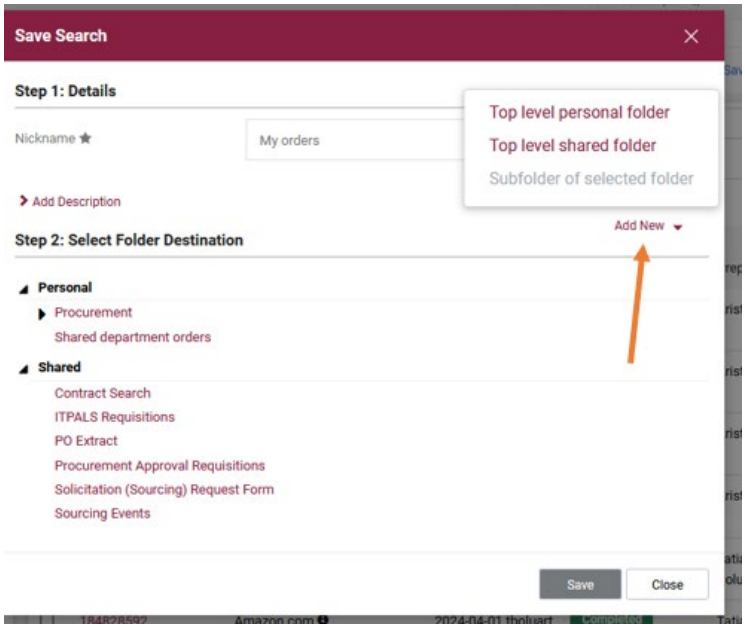
- Select the "Save As" icon



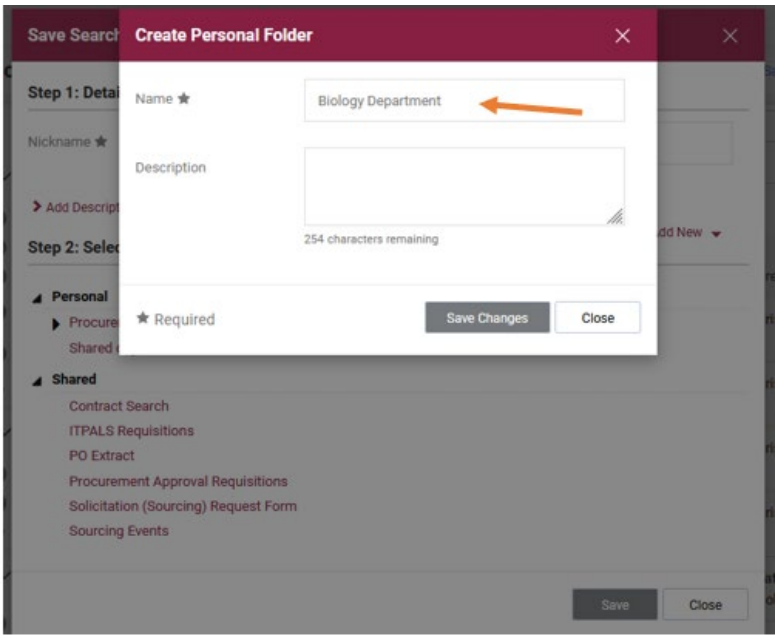
- Enter a nickname that will help you remember the purpose of this search for future reference.



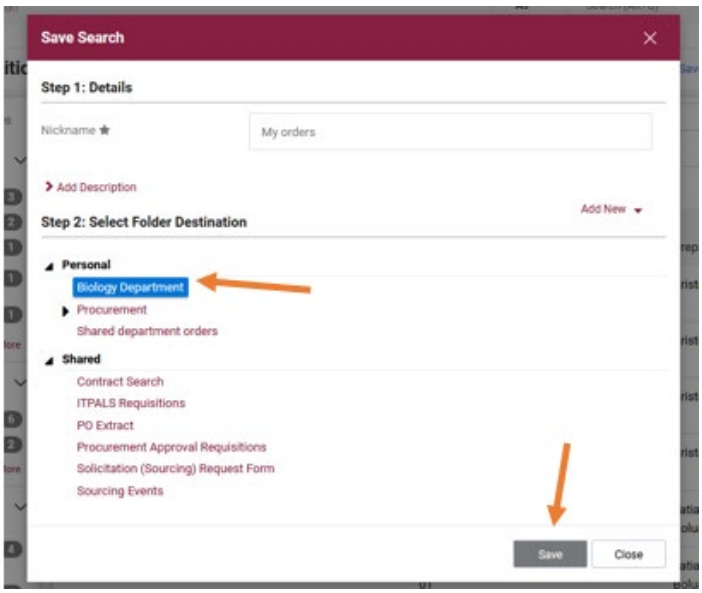
- If you do not have any folders created yet, you'll want to create a new one by clicking Add New. A personal folder will only be viewable by you. A Shared folder will be viewable by other users.



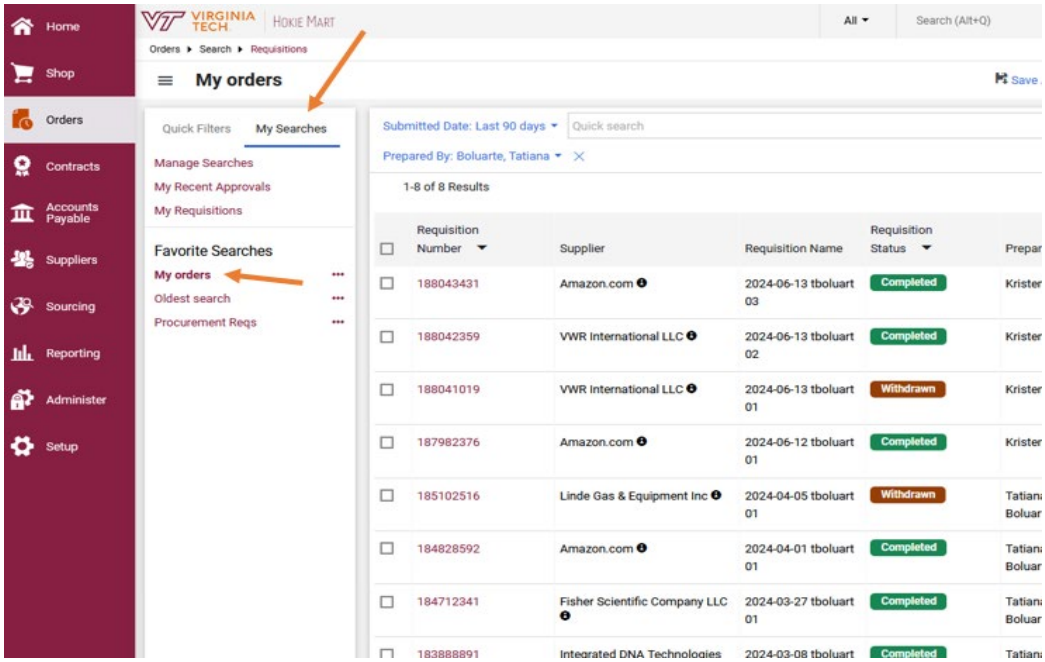
- You will then need to name your folder and save the changes. Name the folder something that makes sense to you.



- 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 has numerous resources to search for commodities and services and place the chosen items in a "shopping cart." After placing these items in the "shopping cart" the Requestor will "check out." After "check-out" is complete, a Purchase Requisition (PR) is created.

On Behalf-of-Requestor

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

Approver

An Approver is an individual designated to electronically review/edit and approve purchase requisitions 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

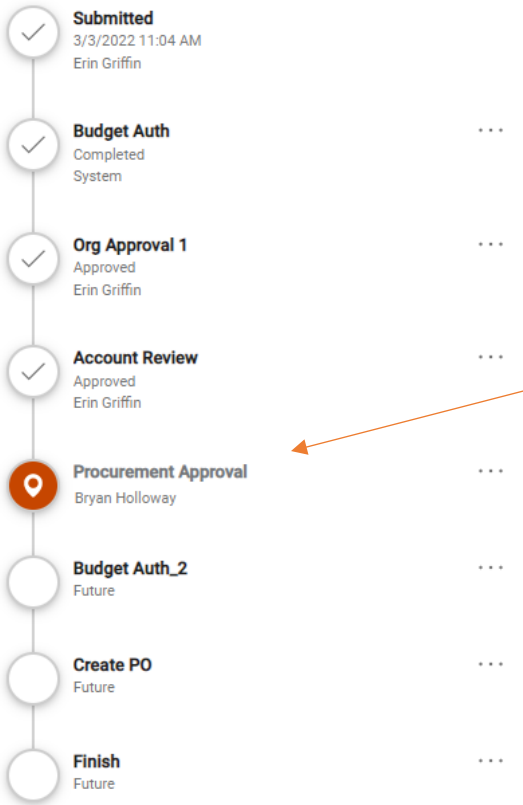
University **Policy 3015, Contract Signature Policy and Procedures**, delegates to department heads the authority to enact purchases of goods and services valued up to $10,000 per transaction. Department heads may select faculty and staff within their department to exercise this authority. However, the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



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

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

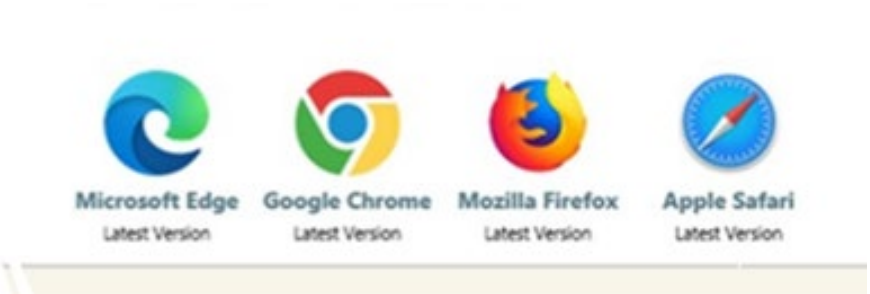
System Requirements

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



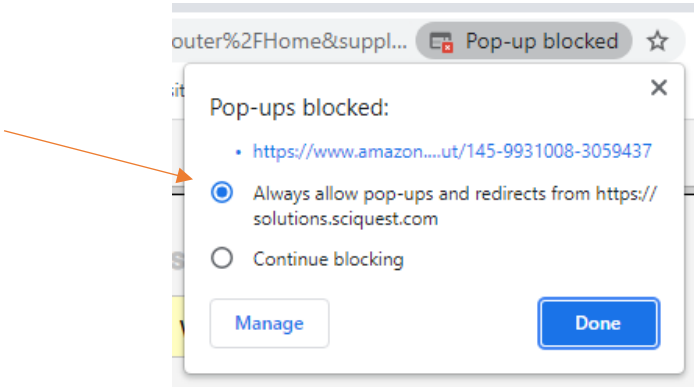
Please Note: *iPad is supported by Jaggaer, however, not all Supplier punchout sites will support the use of this device. Additionally, although Safari is supported by Jaggaer, not all Supplier punchout sites will support this browser.*

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.

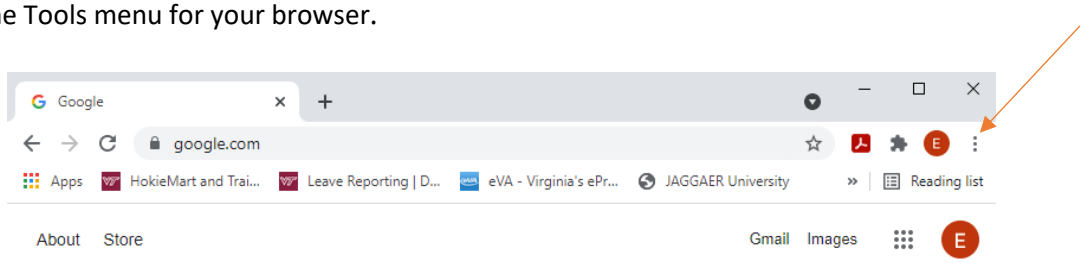
Click on the icon and select "Always allow popups and redirects from **https://solutions.sciquest.com**" to enable pop-ups from Hokiemart. Doing this will save your settings when accessing Hokiemart in future sessions.



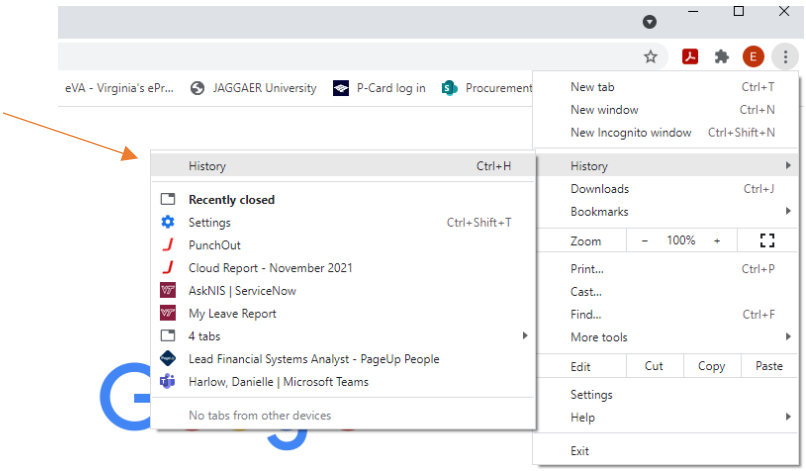
Troubleshooting

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

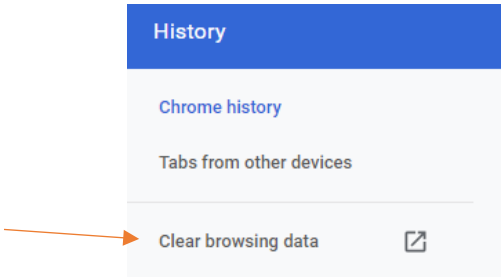
Click on the Tools menu for your browser.



Click on "History".



Click "Clear browsing data".

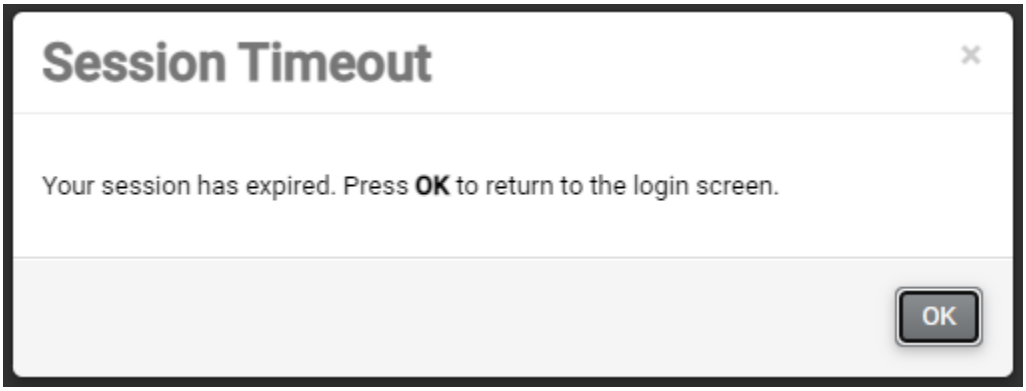


Open a new session of the browser and try accessing HokieMart again.

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

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.

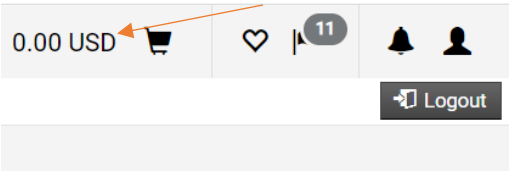


It is important to note that individual punchouts have time-out periods. These, however, are determined by the vendor. It is suggested that if users will not be active in HokieMart for an extended period of time, they should save the cart.

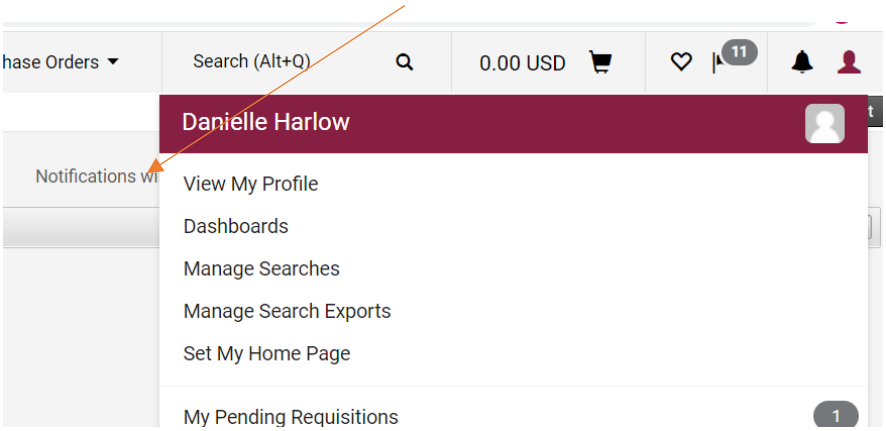
User Information and Settings

My Profile

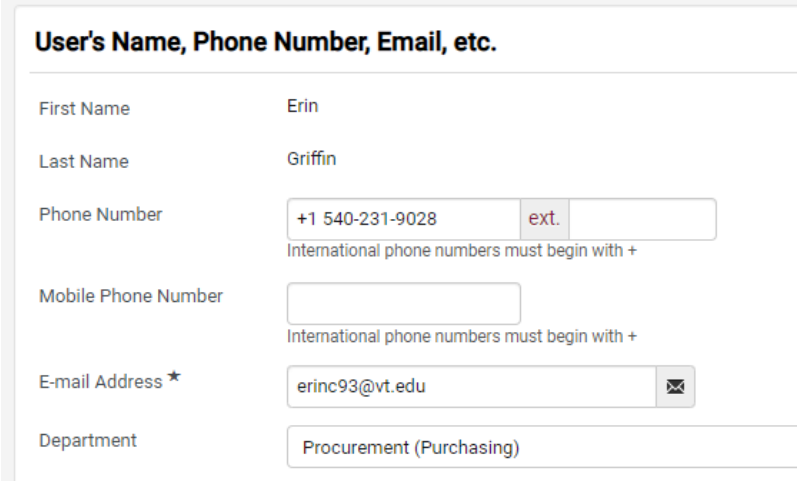
To access your profile settings, select the silhouette icon in the upper right-hand corner.



Select “View my Profile”.



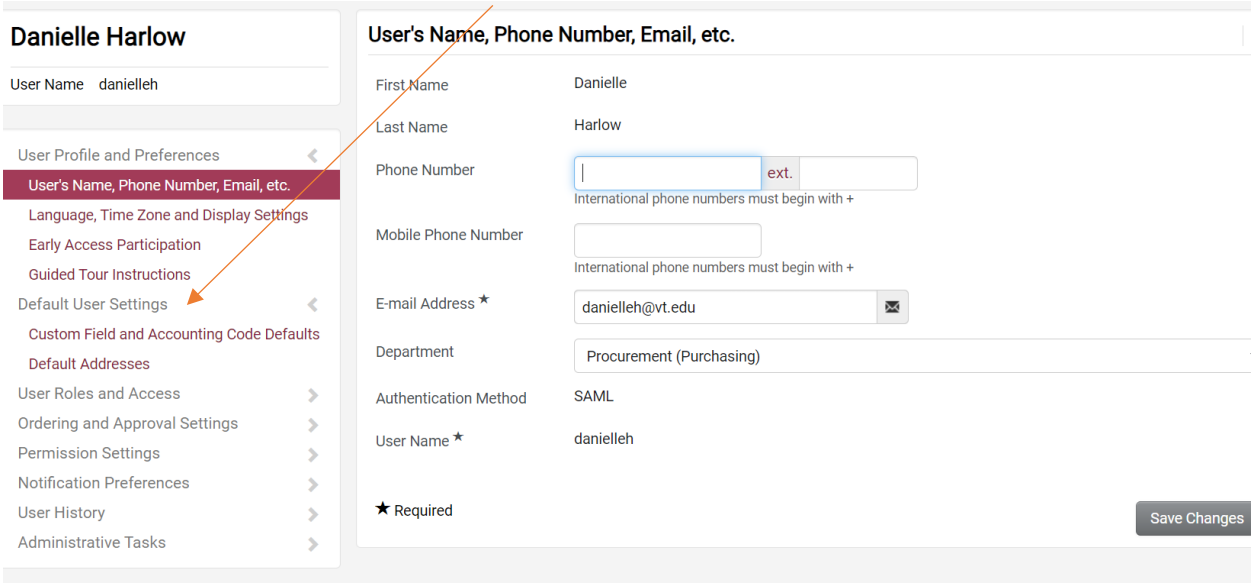
User’s name, phone number, email, etc. is set up at the time your access to HokieMart is granted. Users cannot edit this information themselves. If changes are needed, send an email to General Accounting in the Controller’s office **genactg@vt.edu**.



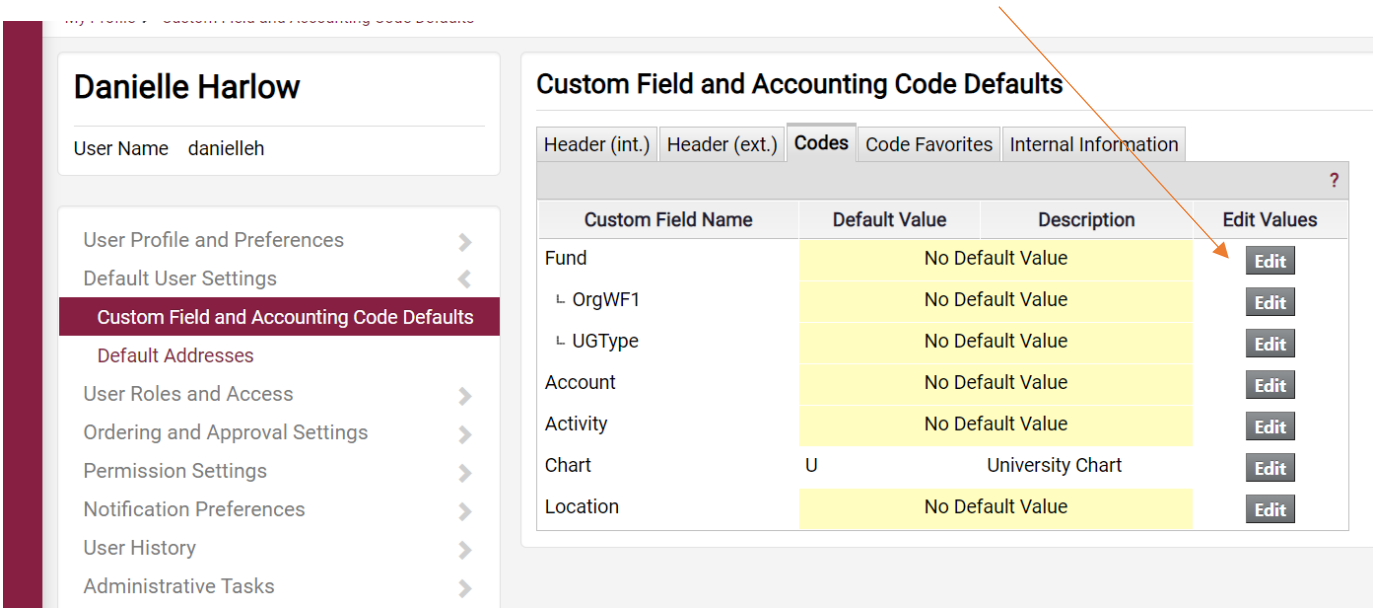
User Default Settings

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”.

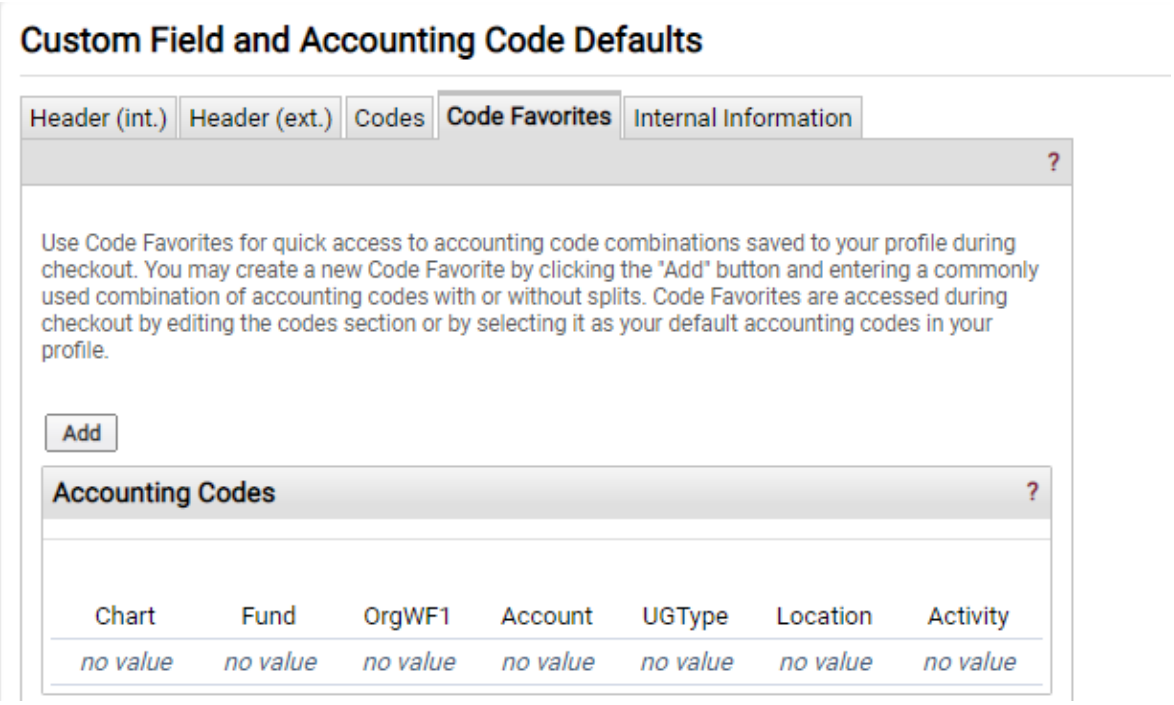


To add a department's fund codes as a default, select each tab and "Edit".



Under the Codes tab, each field has "Edit" as an option. The only fields required when creating and processing a Purchase Requisition are **Fund** and **Account**. All HokieMart users must enter at least one **Fund** and **Account** combination. The department information, known as Organization (Org) information, will populate automatically when the fund number is entered in the field. The system will only let the user enter fund information authorized by the Controller's office.

Account Code Favorites



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).

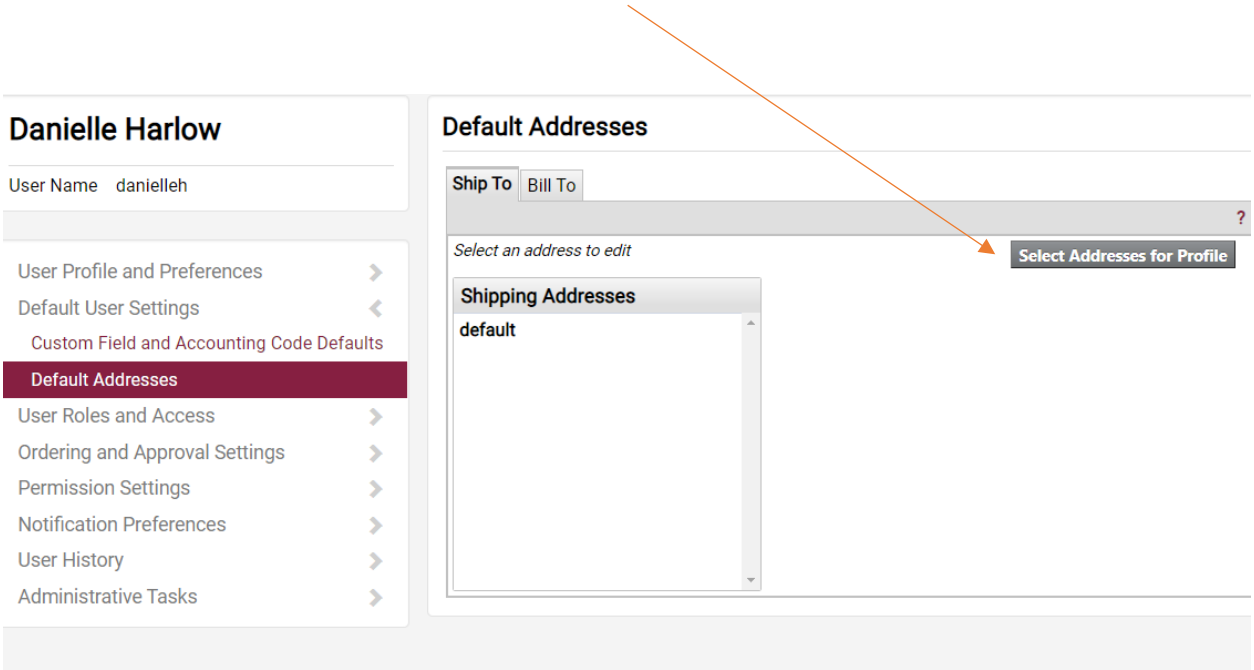
- Enter the nickname for the new favorite being created.
- Enter the codes for the favorite such as fund code, account code, and activity code if applicable.
- Click the save button when complete.

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

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



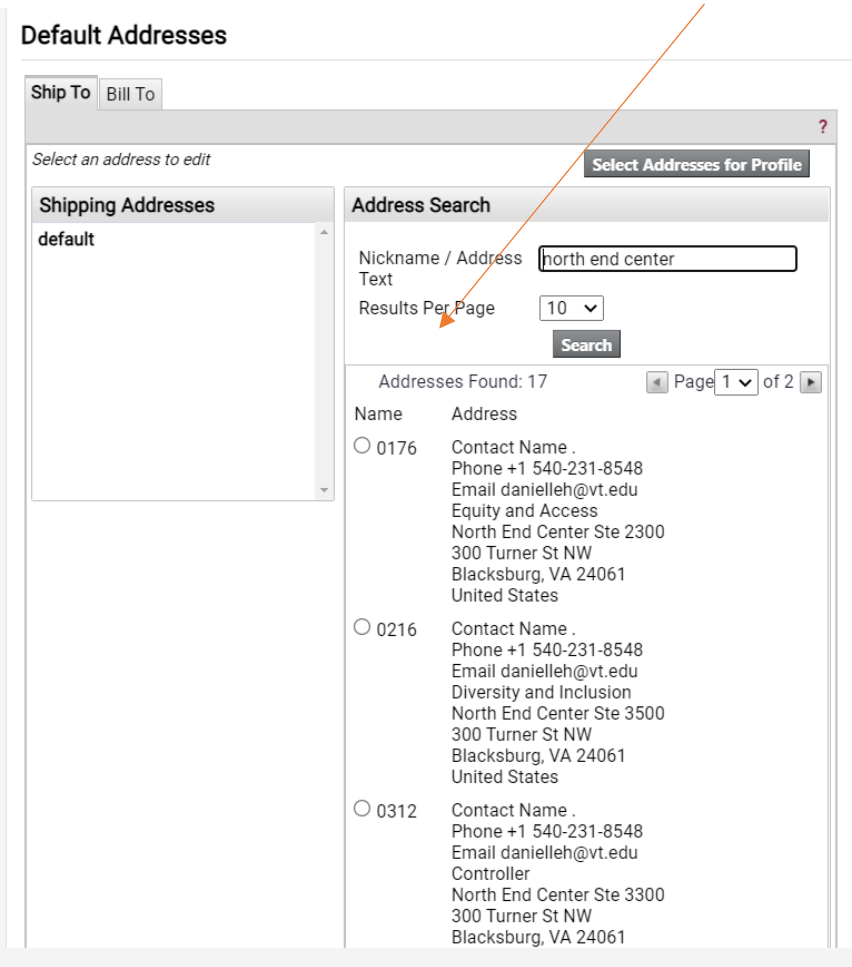
Ship To

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

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

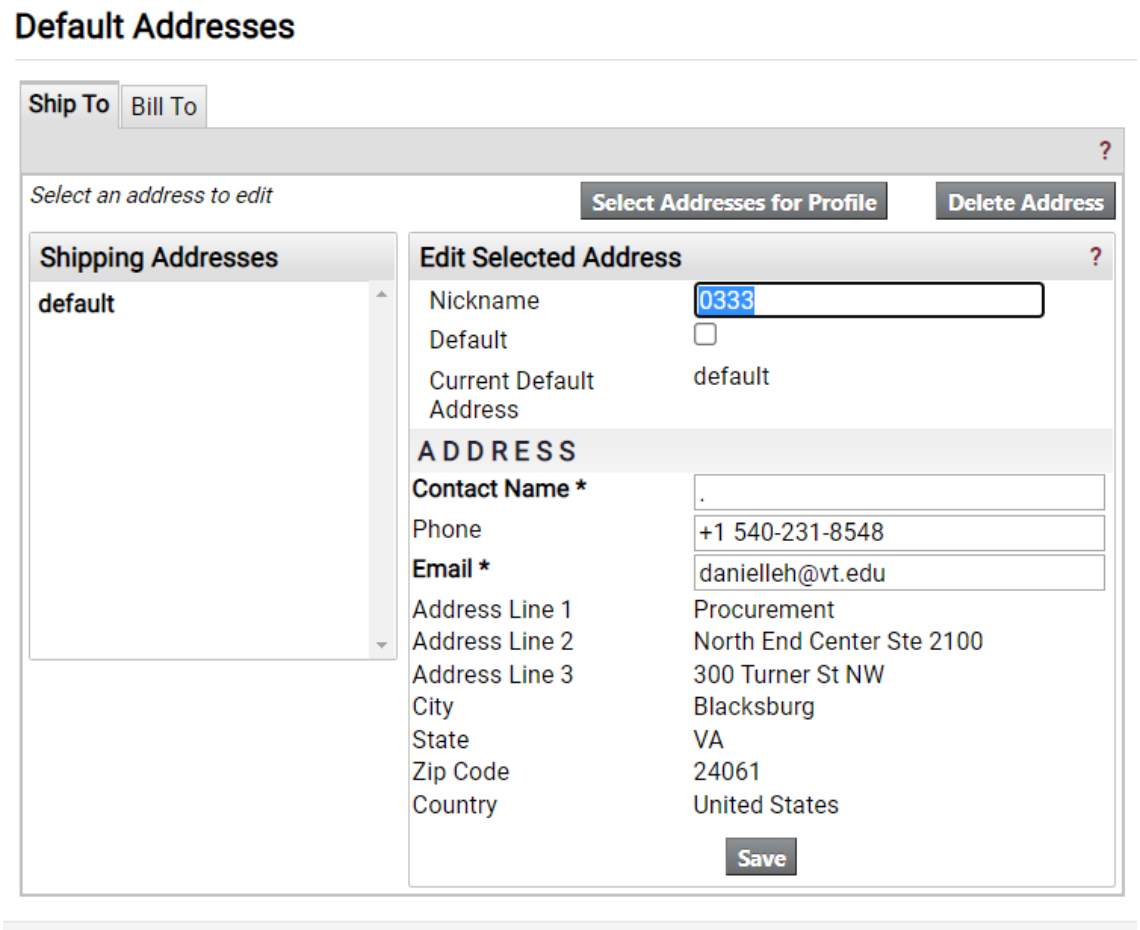
Click "Select Addresses for Profile." *Users may find it easier to enter their department name or building name in the "Address Text" field.*

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



To add the address to your profile

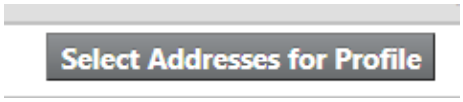
- Place the cursor in the “radio” button and click. The address will be displayed.
- The users name field will default to “.”. Type users name in **Contact Name** field. So that this will display on Purchase Requisitions (PR’s).
- Click “Save.”



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

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

To select additional addresses:

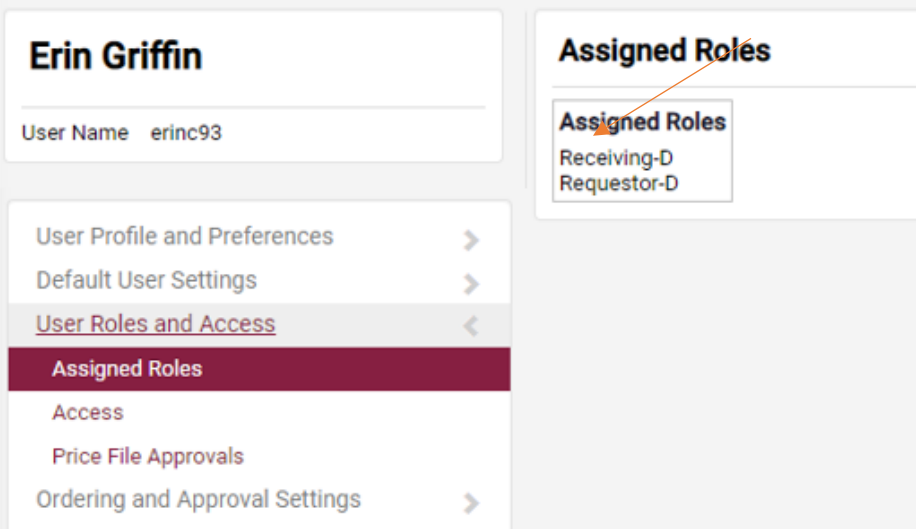
- Click "Select Addresses for Profile". 

- Follow the above steps for adding address information.

Assigned Roles

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

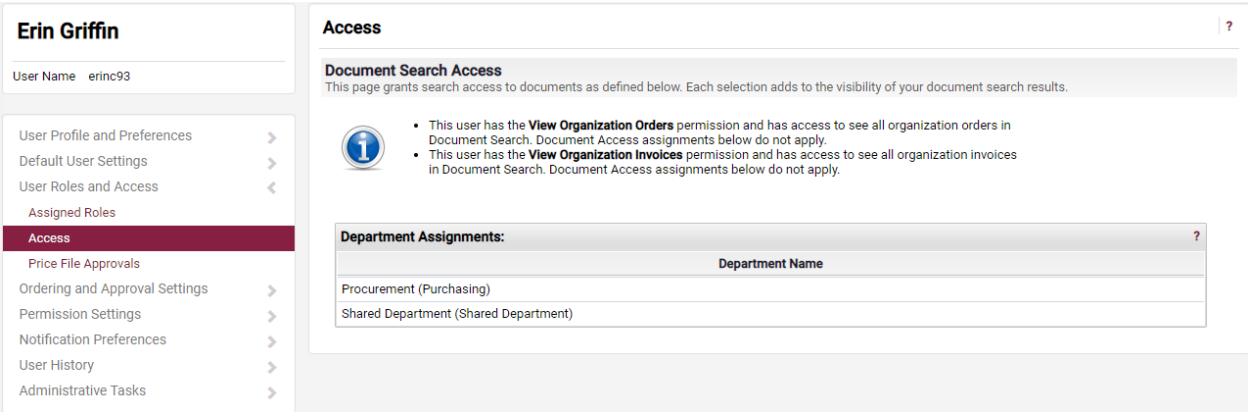
To view your assigned role(s), click on “Assigned Roles” under the “User Roles and Access” option.



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

Access

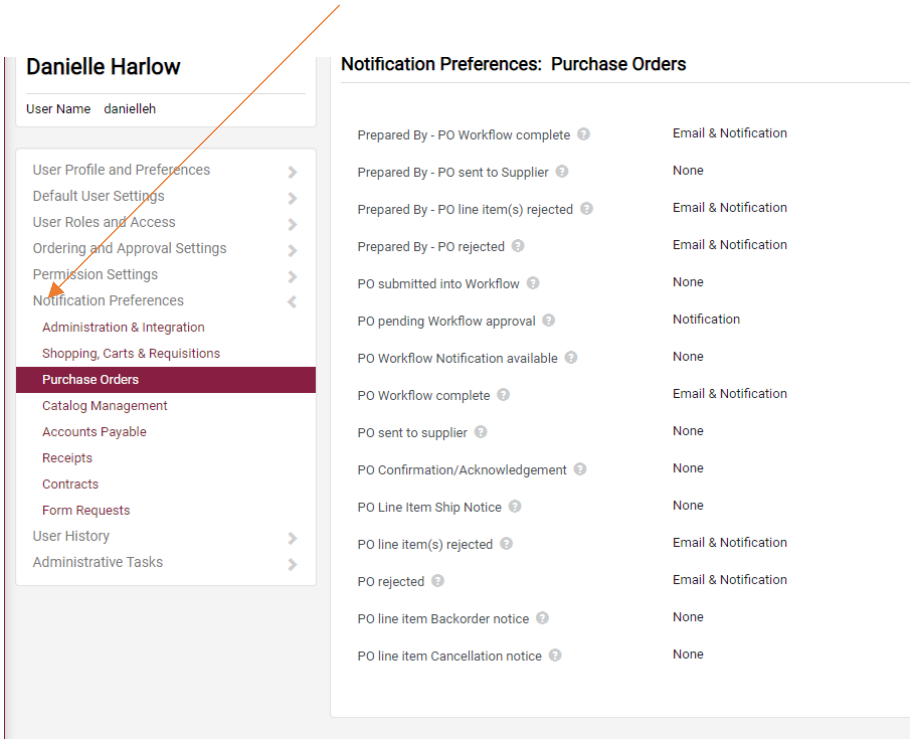
The Access page displays the level of visibility the user has been granted when conducting a search for documents, such as purchase orders and requisitions.



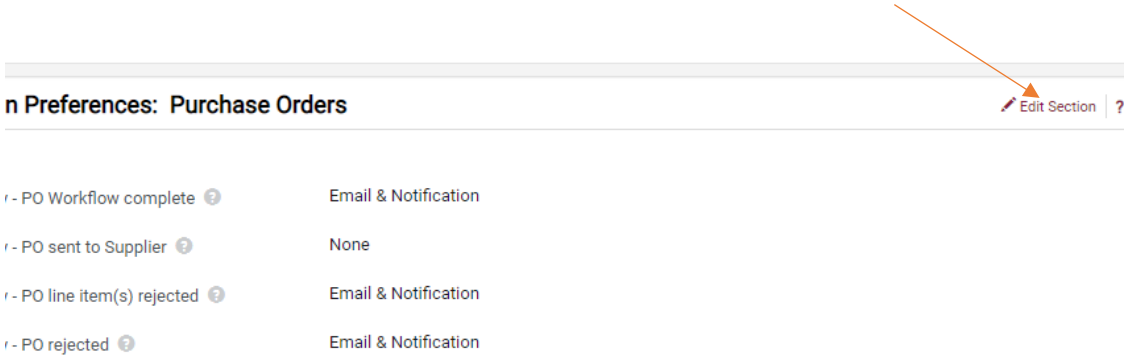
Notification Preferences

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

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



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



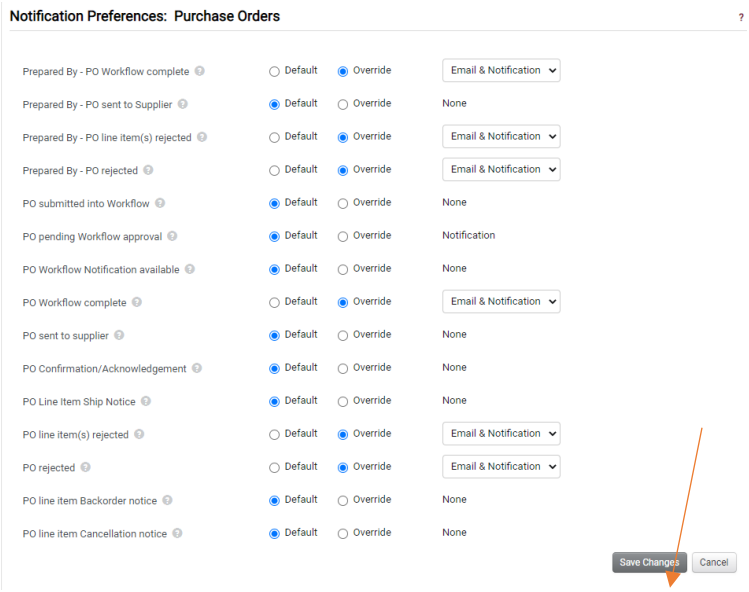
In the edit section select the type of notification you would like to modify from the drop down (none, email, notification or email & notification).

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).



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

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

Related to Purchase Requisitions (PR's):

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

Related to Purchase Orders (PO's)

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

Invoicing

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

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

HokieMart 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:

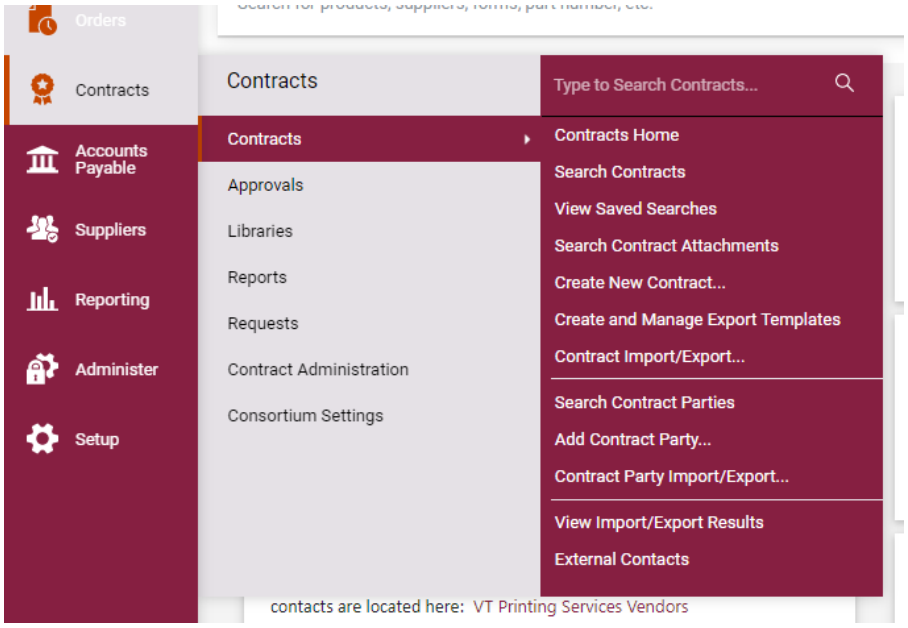
- Hosted Catalog Suppliers
- Punchout Suppliers
- Internal Vendors
- Non-Catalog Item Suppliers

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.

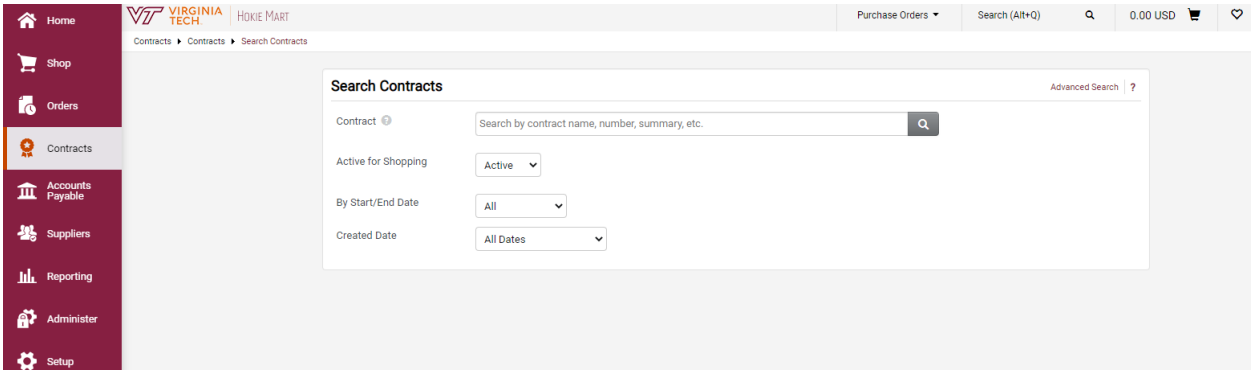
Contract Suppliers

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.



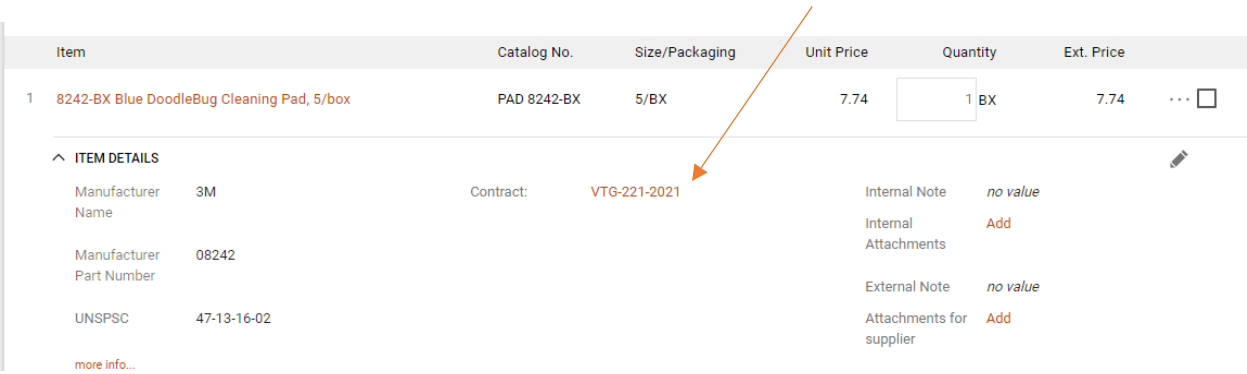
Using the contracts feature in HokieMart will allow users the ability to:

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

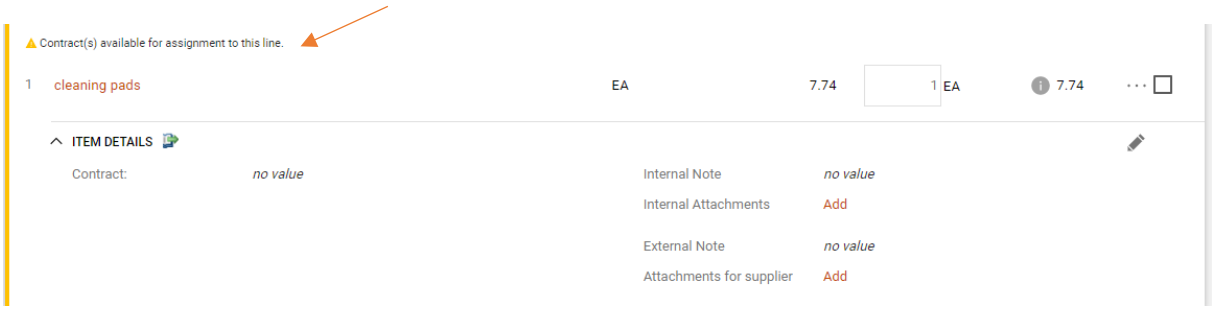


Selecting a Contract on a Requisition

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

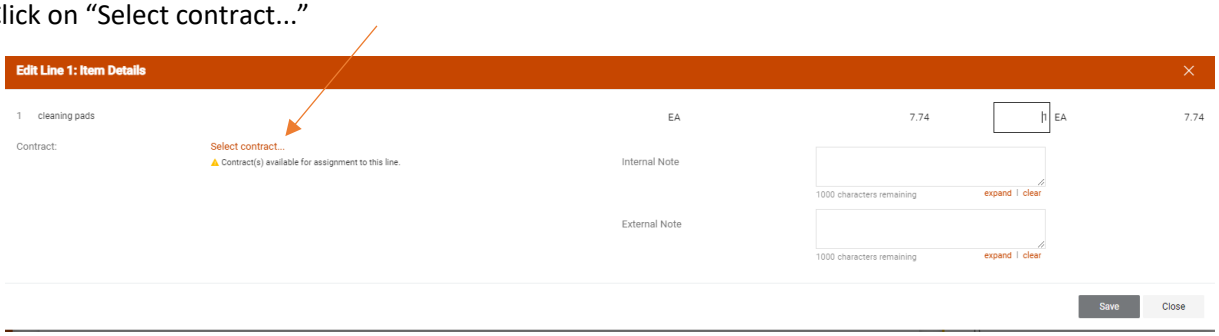


"Select contract" will appear only when a contract may be university-wide but not all good/services are included in the contract.

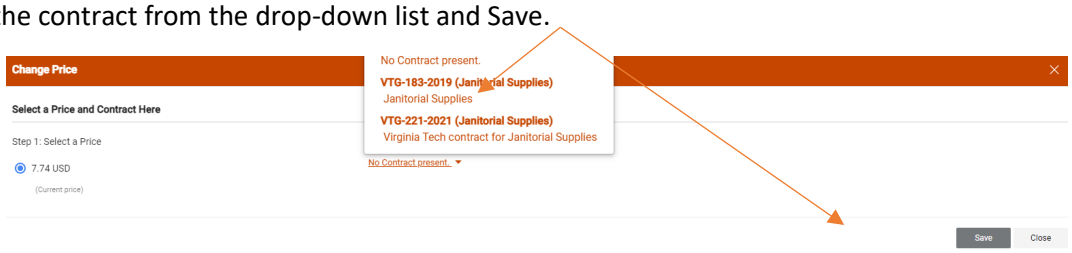


To select a contract, select the pencil icon on the line item

Click on "Select contract..."



Select the contract from the drop-down list and Save.



Viewing Contracts

Contracts can be viewed in HokieMart, based on user access, or through our **Contracts Search Tool**.

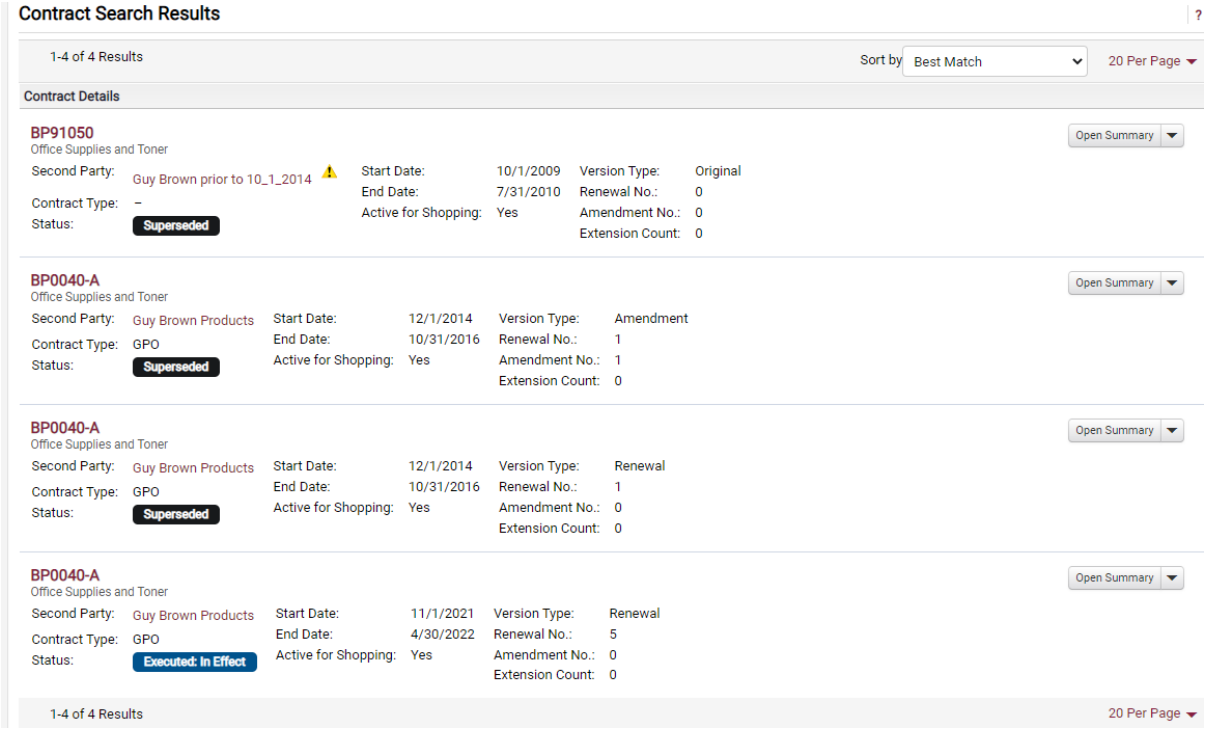
To view contracts through the Contracts Search Tool, navigate to the Procurement website (procurement.vt.edu) and click on the menu on the right-hand side. Under "For Departments," select VT Contracts. Users can then search for vendor names, commodities, or keywords, and also have the ability to add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

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

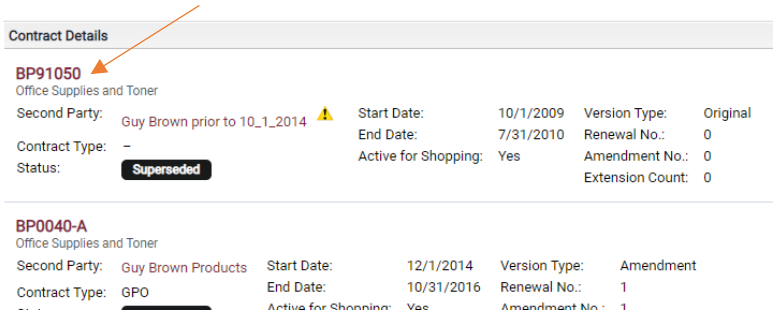
From the Main Screen of HokieMart:

- Click on

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



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



General Contract Information

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

Copier Contracts

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

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

Software and Equipment Maintenance Agreements

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

Contract Warning Message

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

For Issues with A Contract

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

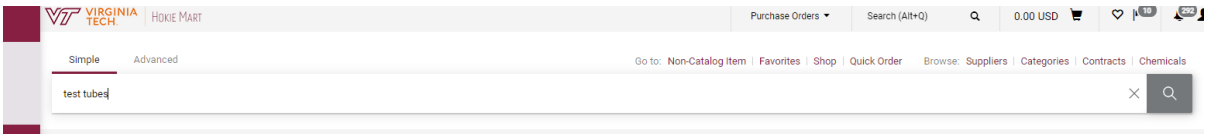
Hosted Catalogs

HokieMart Will Deliver

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

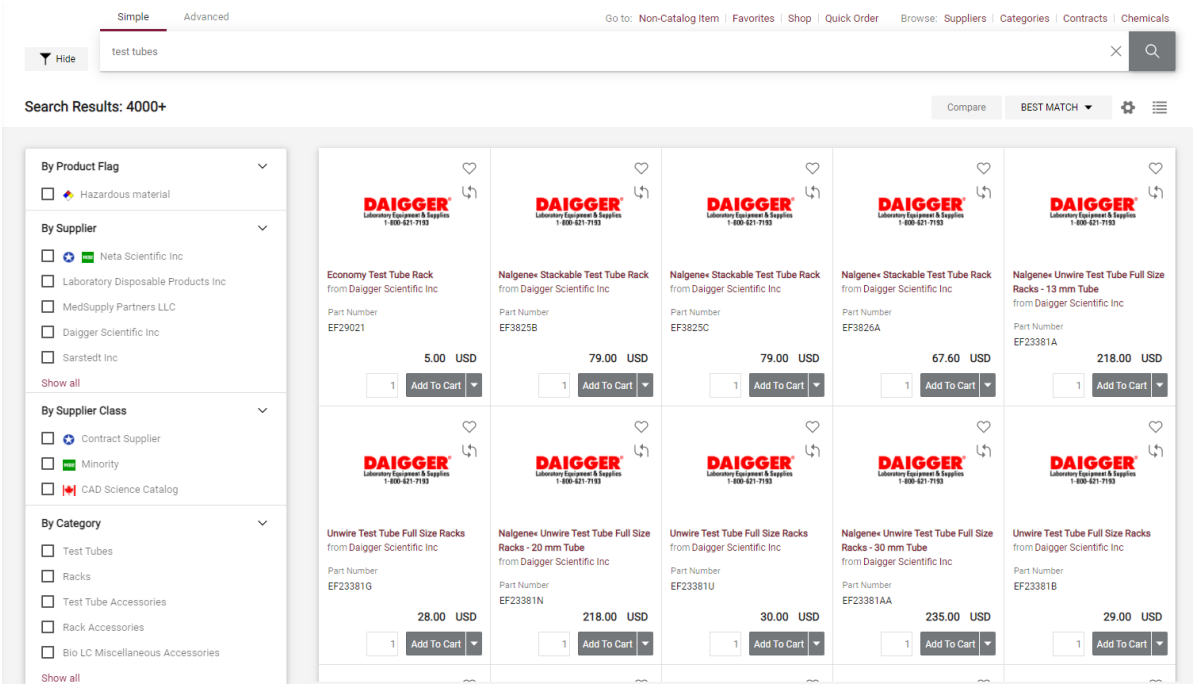
To use the simple search feature from the Shopping Home Page in HokieMart:

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

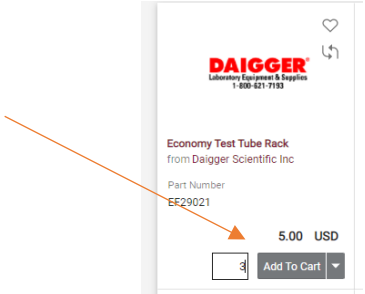


- Click the magnifying glass to search

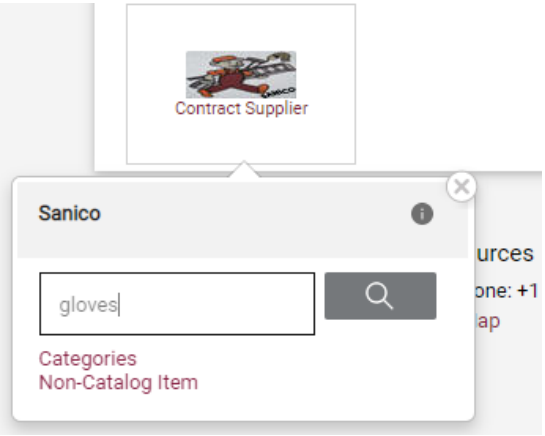
The requested search information will be displayed.



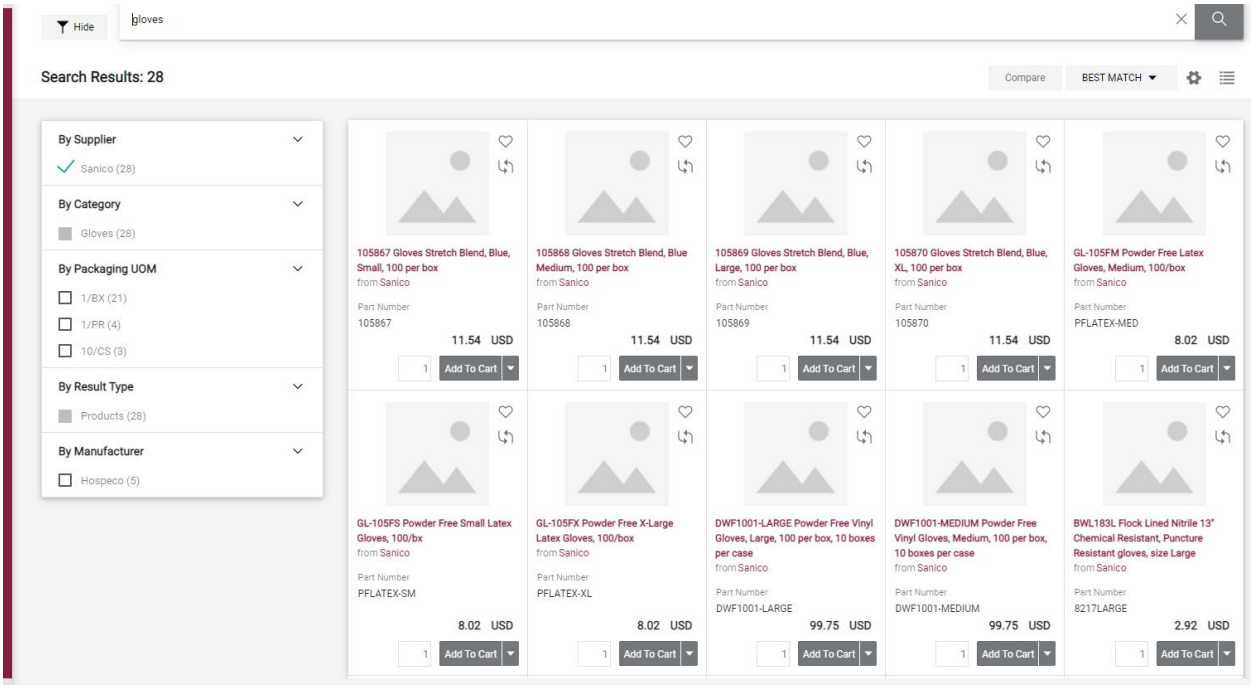
Scroll down to view all item options. Select the desired item and enter quantity and click “Add to Cart”.

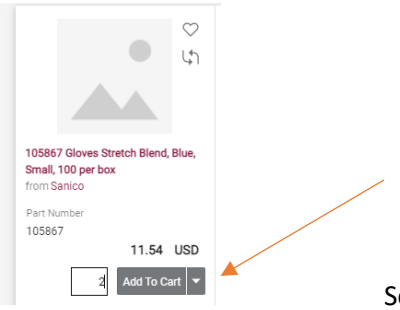


Preferred suppliers with hosted catalogs have an icon under the Hosted Catalog Suppliers section on the home page of HokieMart. To shop a hosted catalog from a preferred supplier, click on the icon/tile and enter what you are looking for in the search bar.



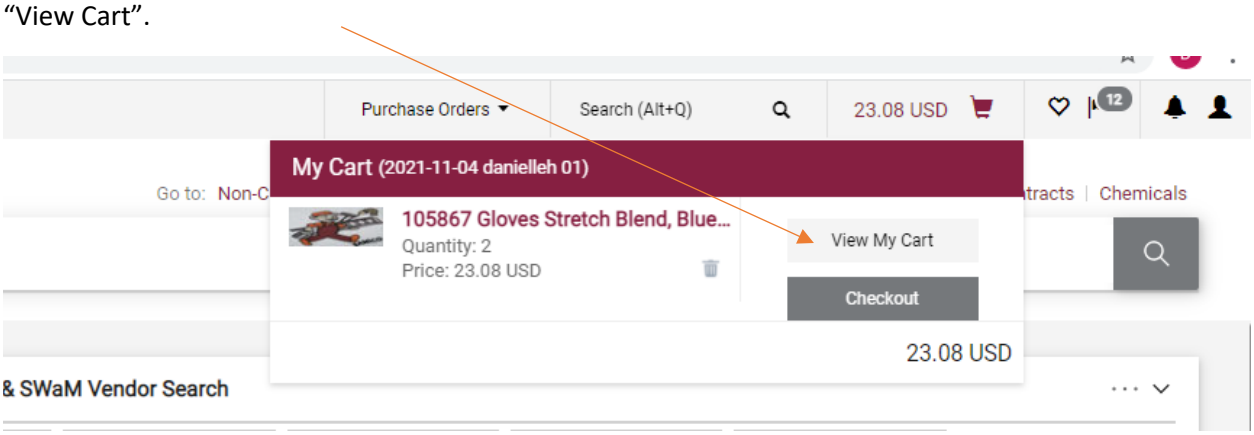
Click the magnifying glass to search





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

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



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

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

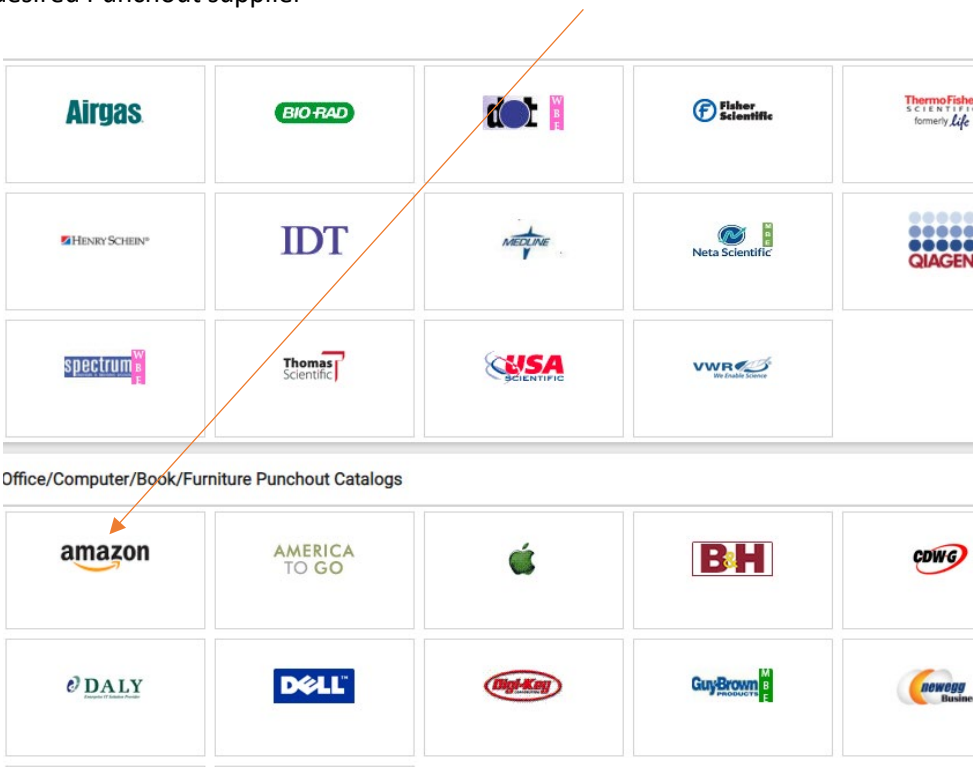
Punchout Vendors

HokieMart Will Deliver

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.

- Select desired Punchout supplier

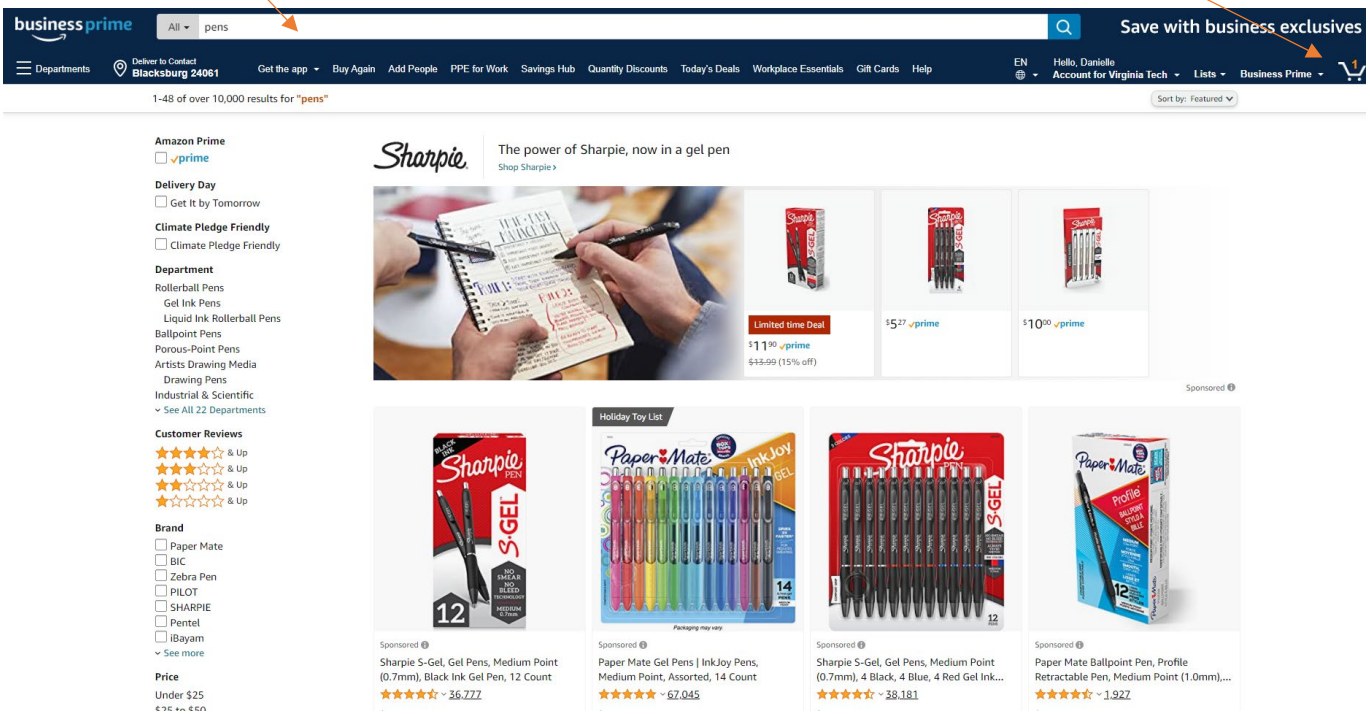


Users will be punched out of HokieMart and onto the supplier's website for VT ordering. When searching for items, the dollar value displayed will be the contract/discounted price. All of the Punchouts are similar, **<u>but they are each a bit different in how items are placed into the shopping cart.</u>**

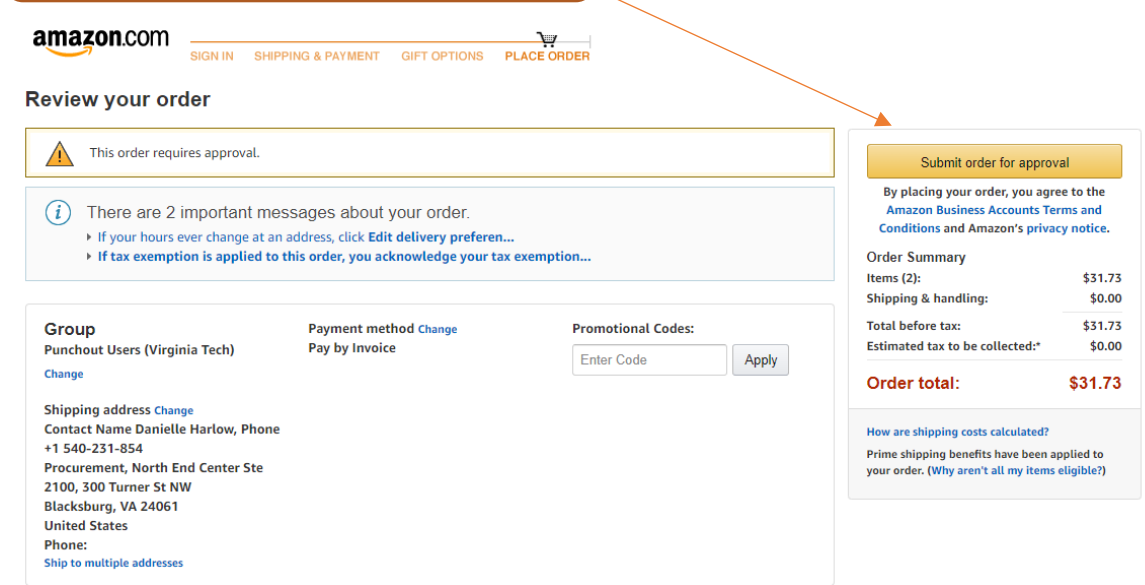
It is important that when you are placing a punchout order, you access the supplier's website via HokieMart.

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

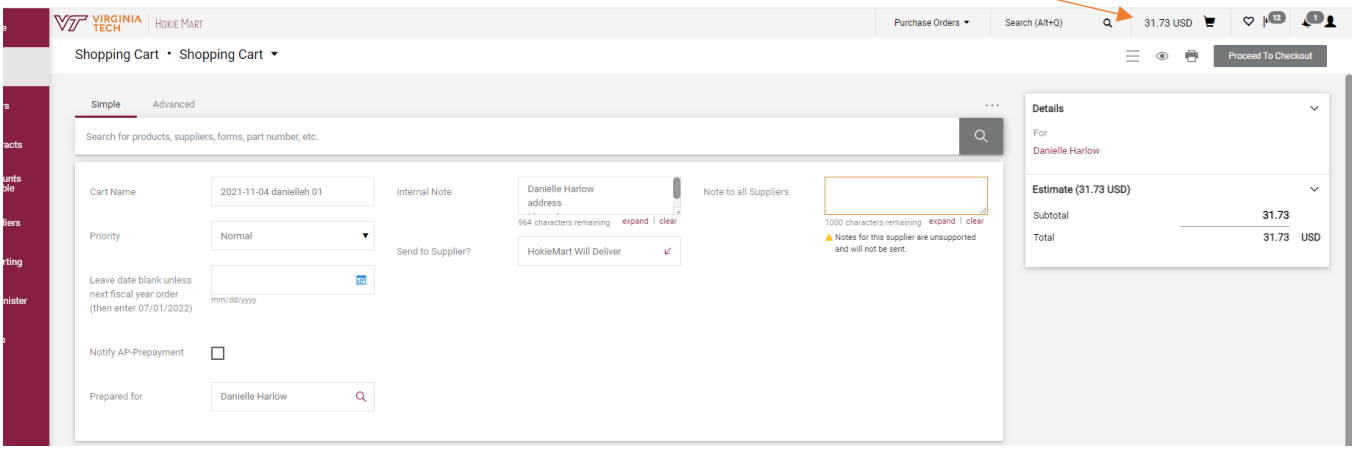
Add your item to the cart and click the check out or cart button depending on which site you are utilizing.



Submit your cart for approval within the Supplier catalog.



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



Tips:

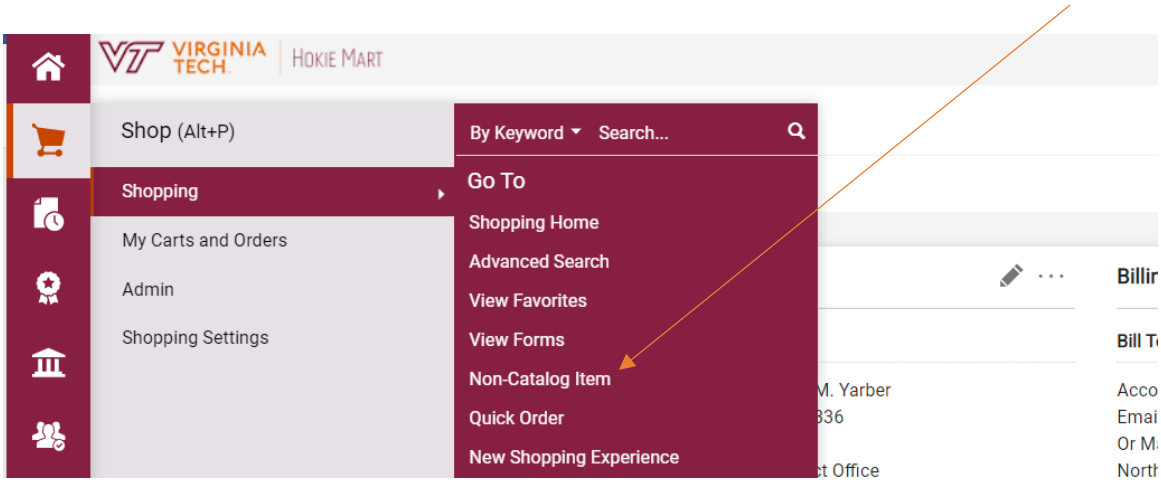
- ***External Notes and Attachments cannot be used with punchout PO's.***
- ***Suppliers will not receive any external notes or external attachments on punchout PO's.***
- ***User may NOT copy a cart that was created through a punchout.***
- ***After returning to the cart, users may NOT add or delete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

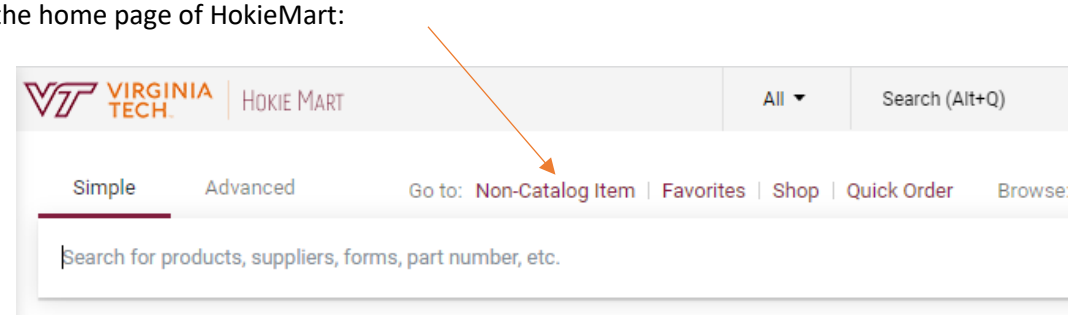
HokieMart Will Deliver OR User Will Deliver

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

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

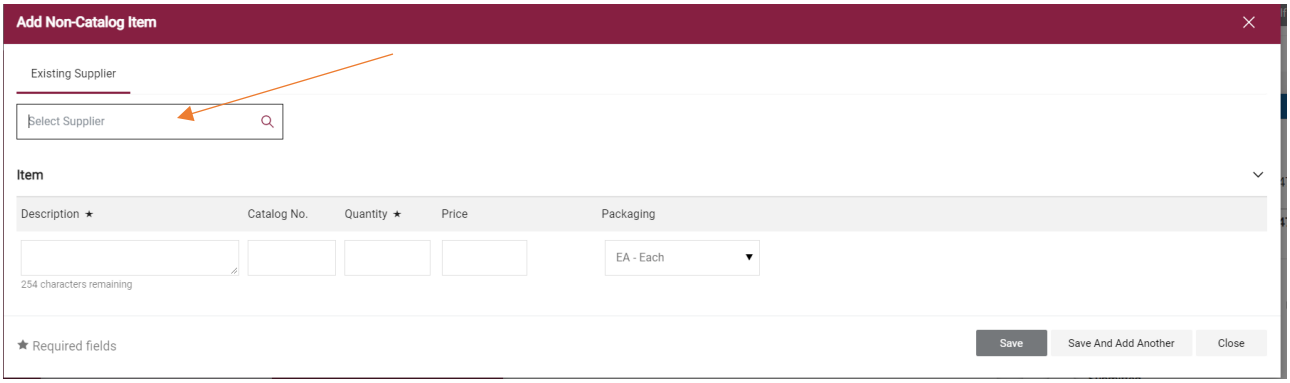


Or on the home page of HokieMart:

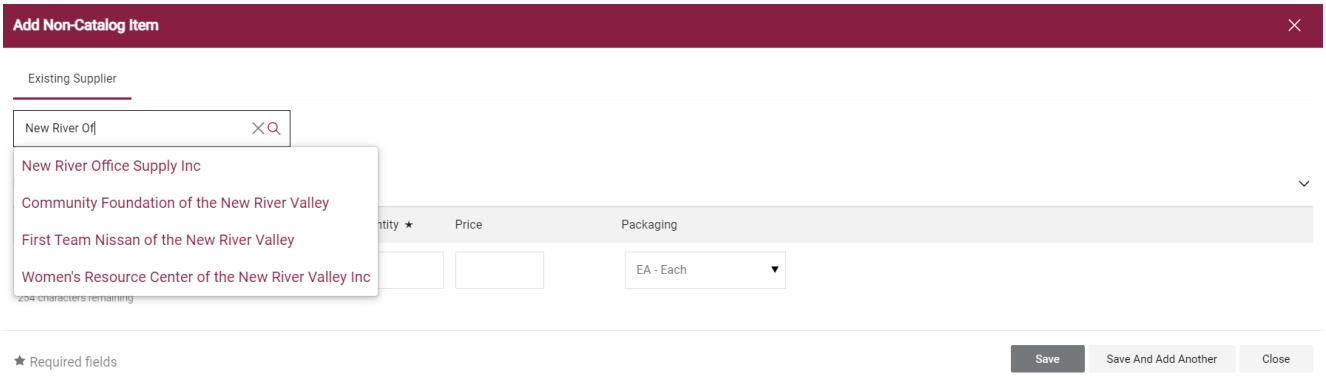


Select Non-Catalog Item to open a blank form.

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



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

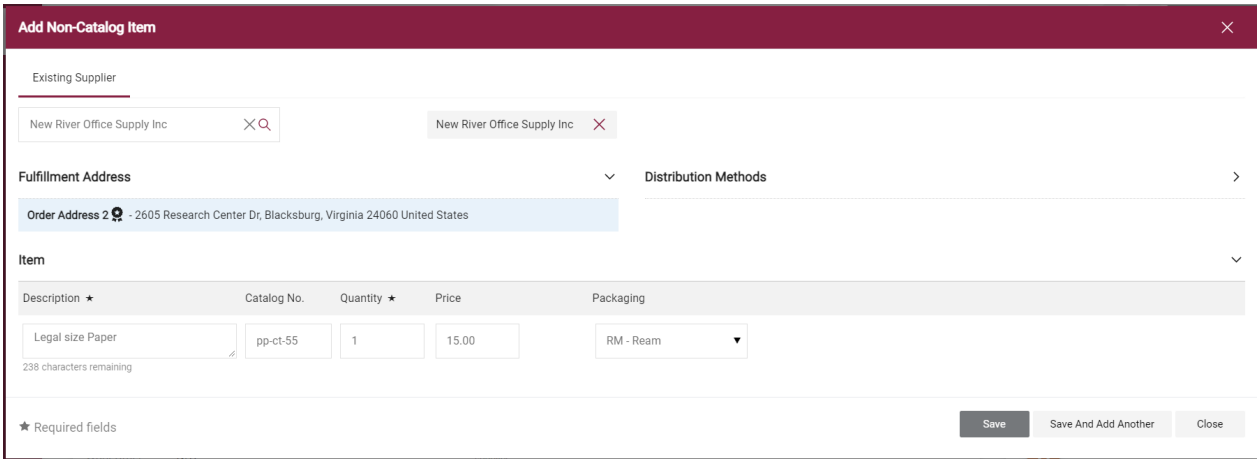


Select the desired supplier.

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.).

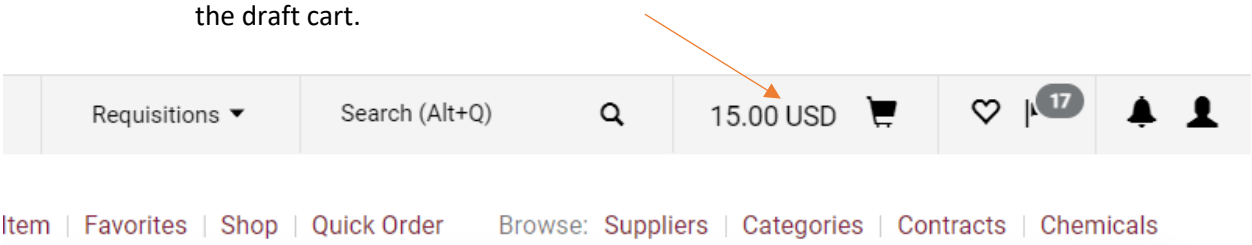


When only one item is to be ordered,

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

If multiple items are being ordered from the same vendor:

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



Users will now have the option to:

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

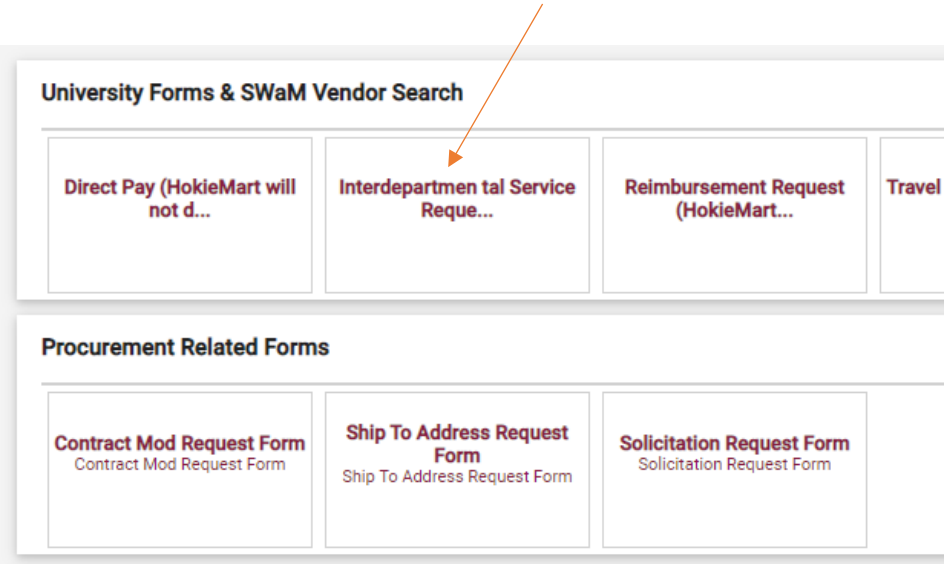
Interdepartmental Service Request (ISR)

HokieMart will deliver PO

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

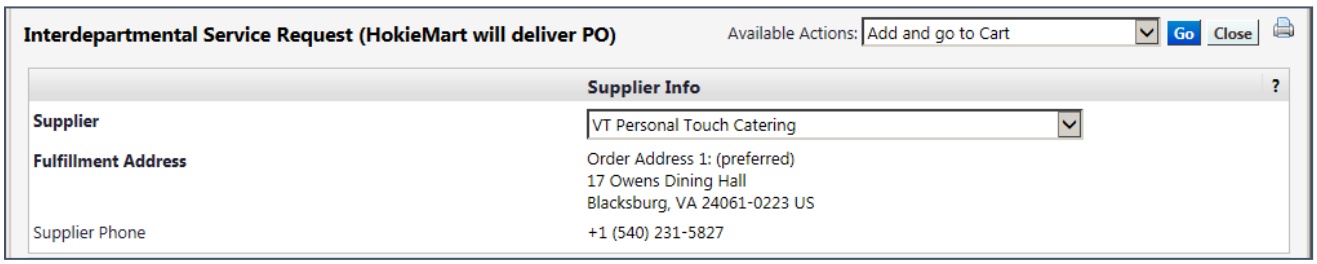
From the Main Screen of HokieMart:

- Select "Interdepartmental Service Request."



From the drop-down menu:

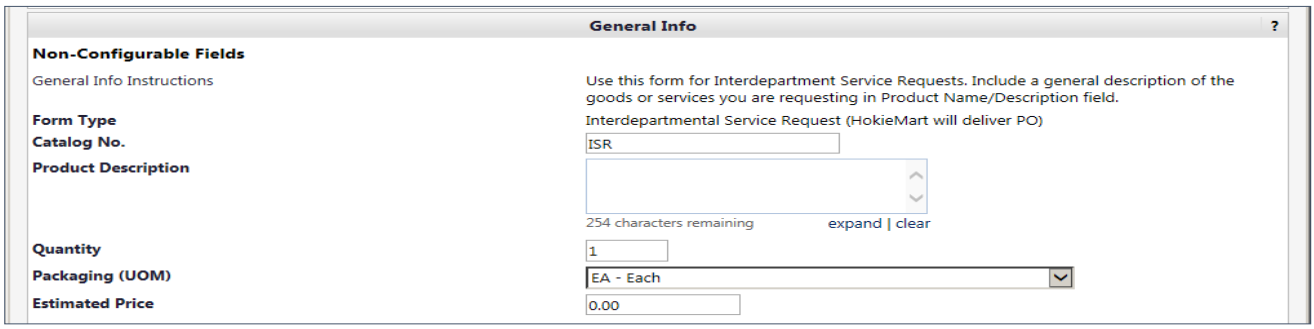
- Choose the desired VT supplier.
- Complete list of Virginia Tech internal university suppliers can be found at: https://www.procurement.vt.edu/content/dam/procurement_vt_edu/hokiemart/Internal_Vendor_Listing.pdf



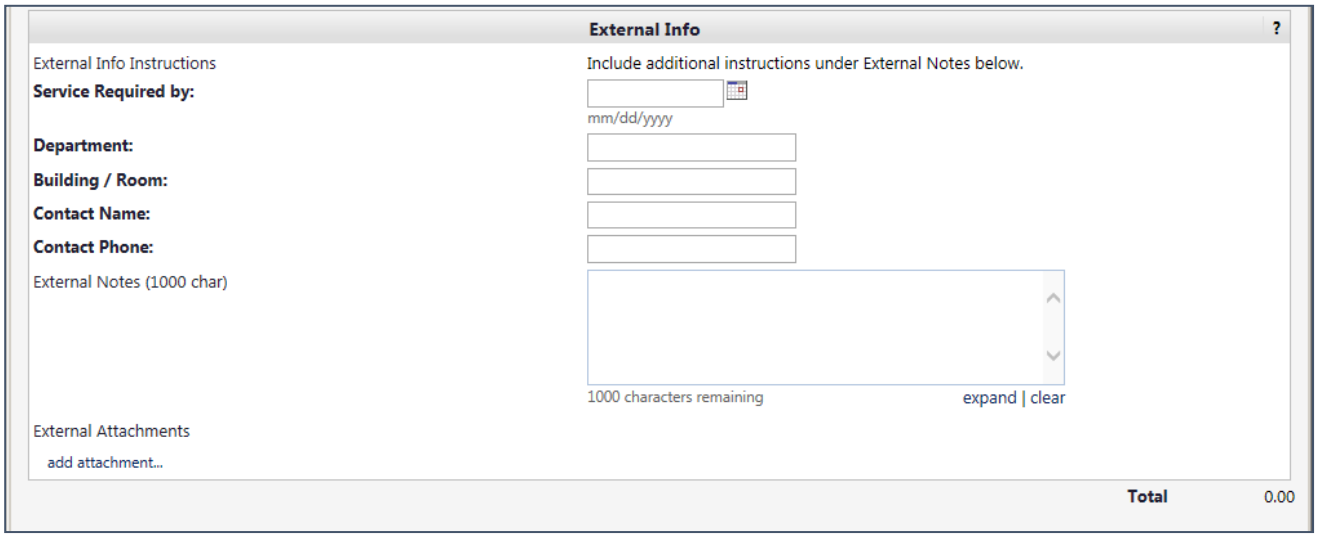
In the General Info section, enter all information.

- Catalog No. should display ISR **(Do not edit).**
- Product description allows the user to identify what is purchased.
- Quantity - leave at 1. This is one service request.
- Packaging defaults to EA – each.

- Estimated Price – enter how much you think the request will cost.



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



- If attachments are necessary, click "add attachment."

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

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

From the Available Actions drop-down menu:

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

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

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

Account Codes for ISRs

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

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.

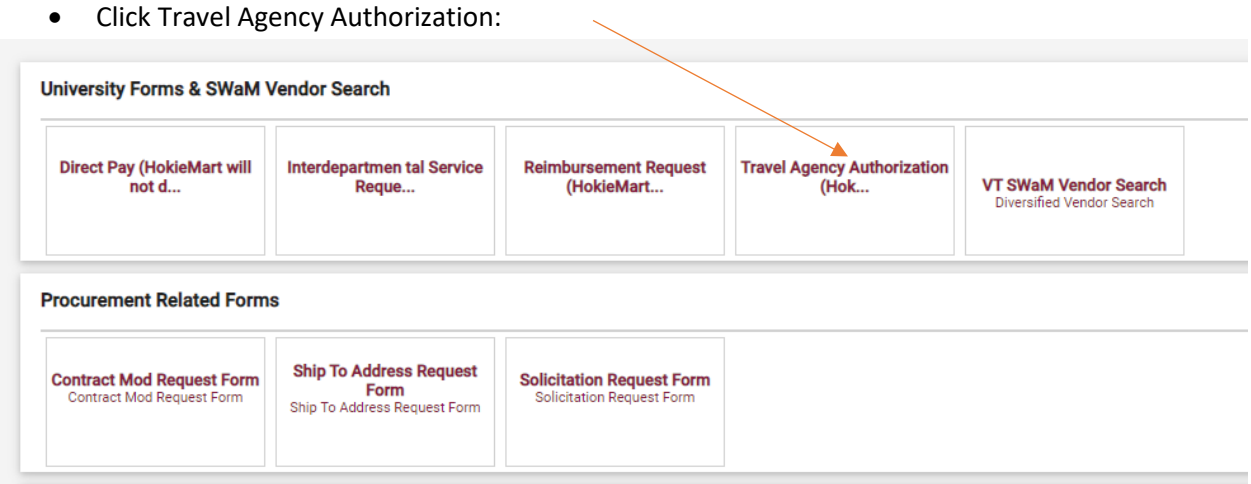
Travel Agency Authorization

HokieMart Will Deliver PO

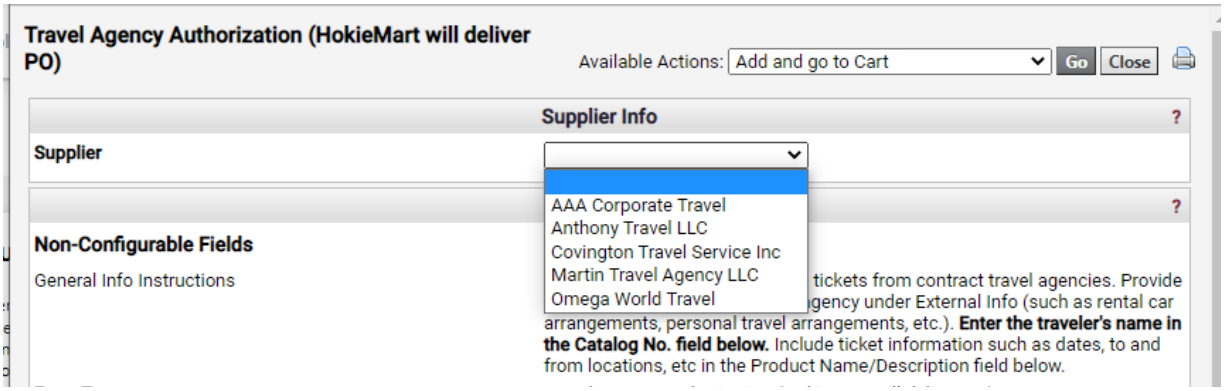
Use this form to purchase airline tickets and other travel related services from contract travel agencies listed on the drop-down menu of the Travel Agency Authorization. **Do not use this form for travel reimbursements to university faculty or staff**. See the Controller's website for information related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

From Main Screen of HokieMart:

- Click Travel Agency Authorization:



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



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

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

Sample Travel Agency Authorization Form

Travel Agency Authorization (HokieMart will deliver PO)

Available Actions: Add and go to Cart | Go | Close

Supplier Info

Supplier

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

254 characters remaining expand | clear

Quantity

Packaging (UOM): EA - Each

Estimated Price

Internal Info

Internal Info Instructions: Purpose of trip.

Internal Notes (1000 char)

1000 characters remaining expand | clear

Internal Attachments

add attachment...

External Info

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

External Notes (1000 char)

1000 characters remaining expand | clear

External Attachments

add attachment...

Total 0.00

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

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

- Click Add and go to Cart.
- Then click Go.

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

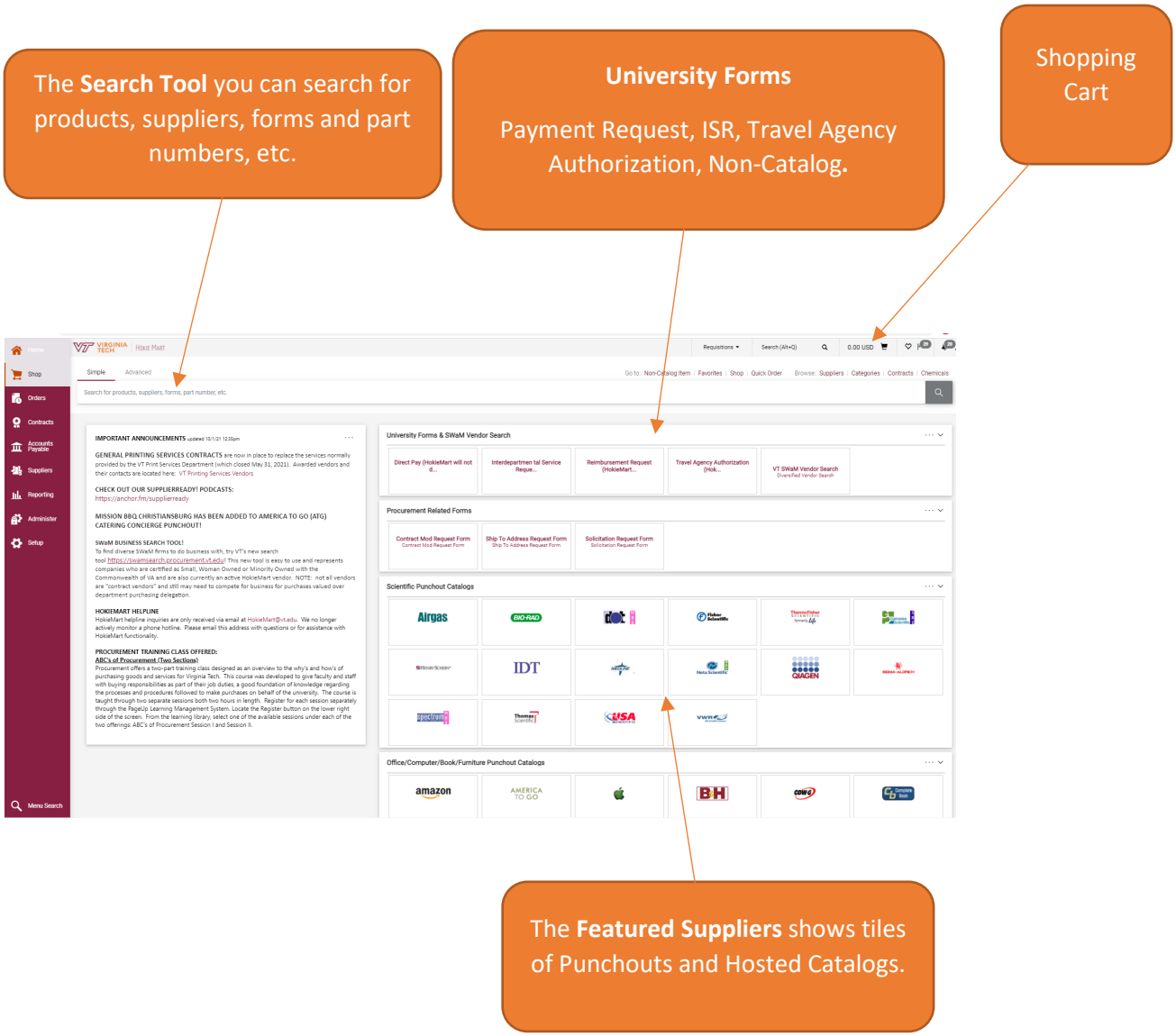
Processing Orders in HokieMart

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

Create the Cart

Choose the appropriate form from the HokieMart main screen:

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



Edit the Cart

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

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

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

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

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

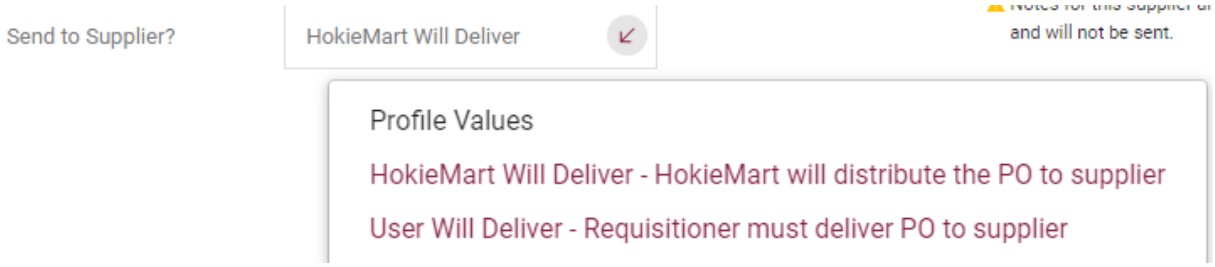
Prepared For (On-Behalf-Of) - This feature is used by the On-Behalf-of Requestor. The PR is prepared for another Requestor or "Shared Department." The selection may be made here or in the Final Review. For additional information on this topic refer to the On-Behalf-Of Requestor section.

Internal Notes - notes intended for department and/or university. See section below for more details.

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

Send to Supplier? – Verify the delivery methods.

- “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.

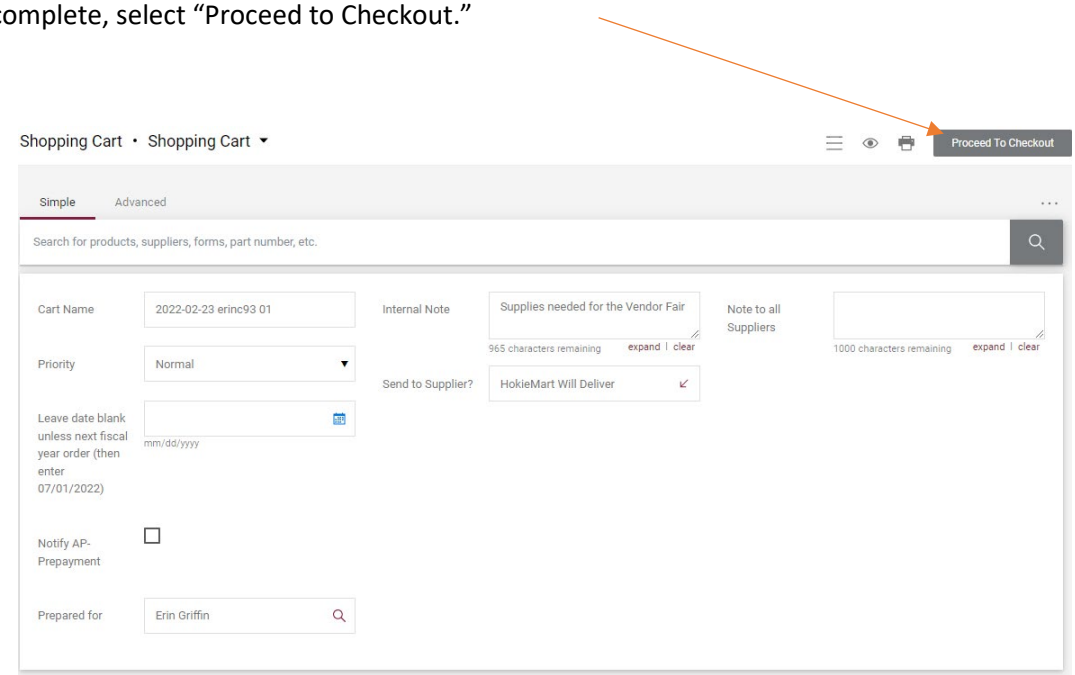


In most cases, “HokieMart will Deliver” will be the correct response.

If the delivery method should be changed:

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

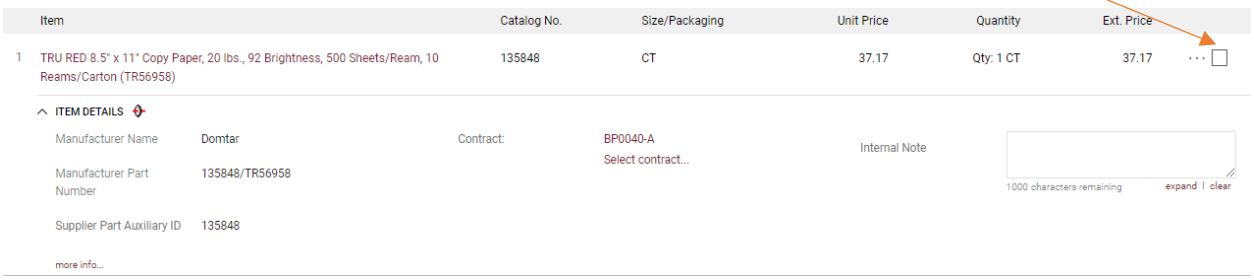
Once complete, select “Proceed to Checkout.”



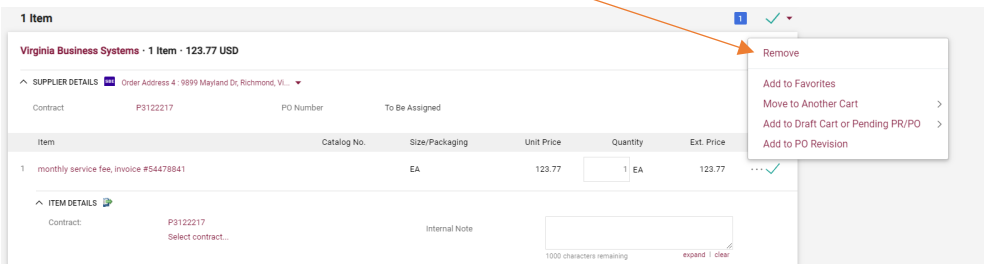
Removing Items from a Cart

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

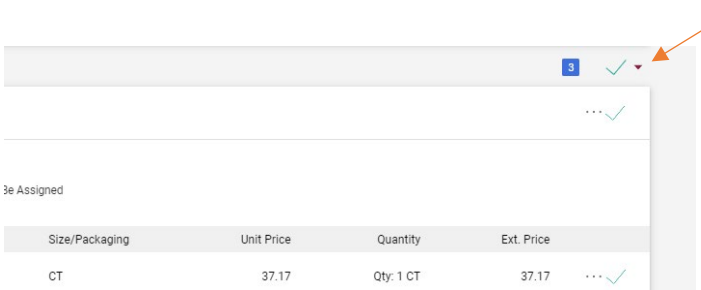
- Place a check mark in the box next to the item to be removed.



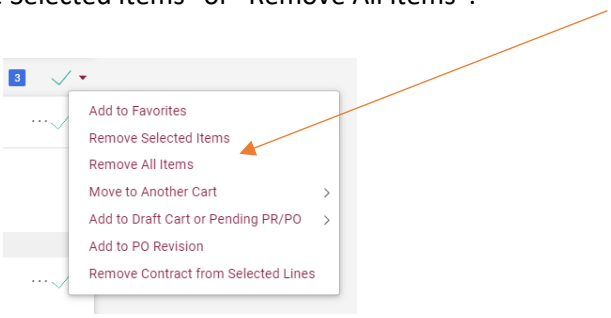
- Select • • •
- Highlight and select “Remove”.



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



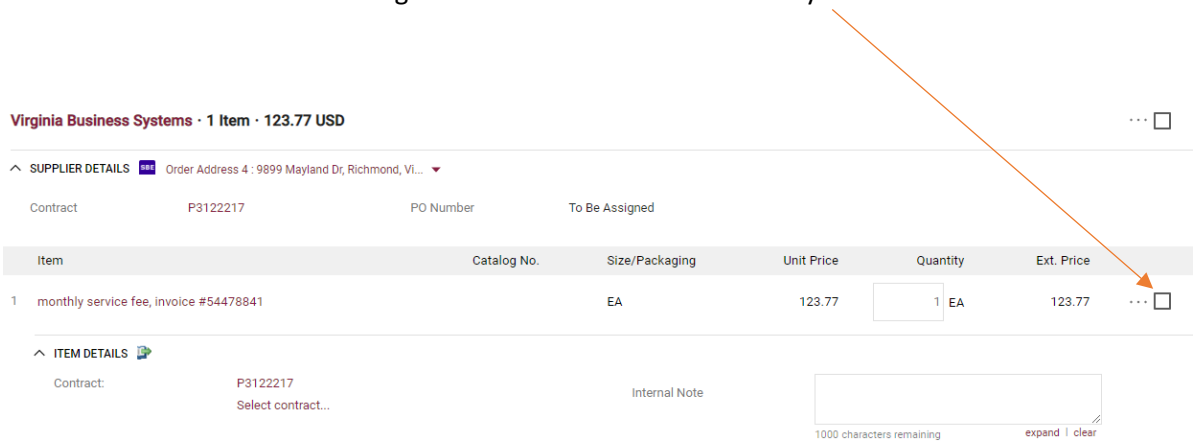
You now have the option to “Remove Selected Items” or “Remove All Items”.



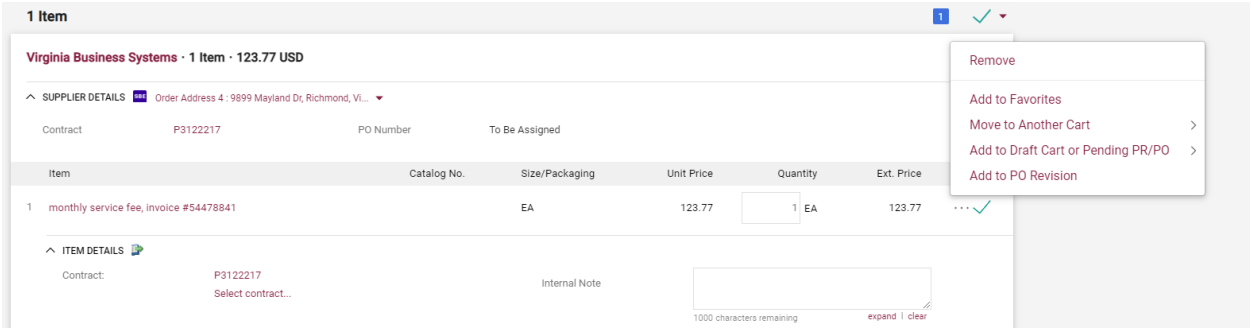
Moving Items to Another Cart

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

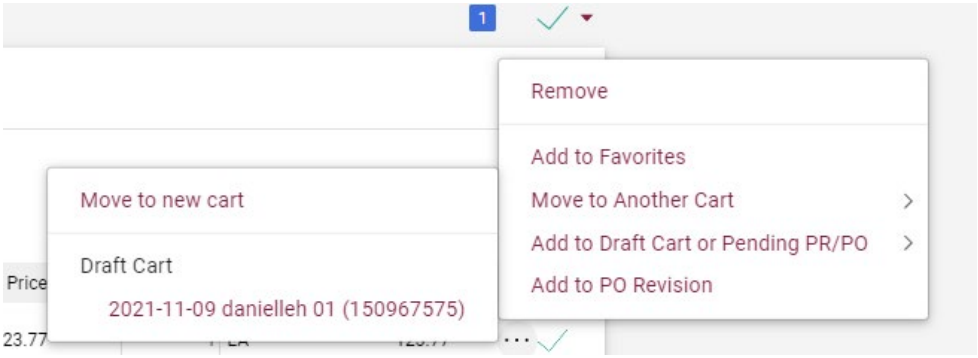
- Place a check mark in the right-hand box of the line item that you wish to move.



- Select • • •



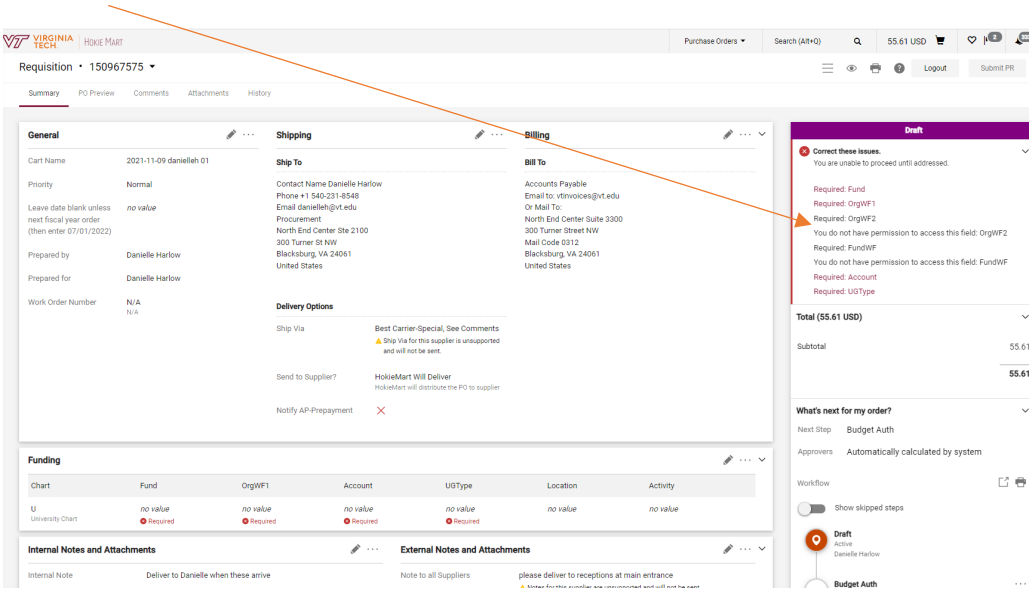
- Select Move to Another Cart.
- You can either move the line item to a new cart or a draft cart.



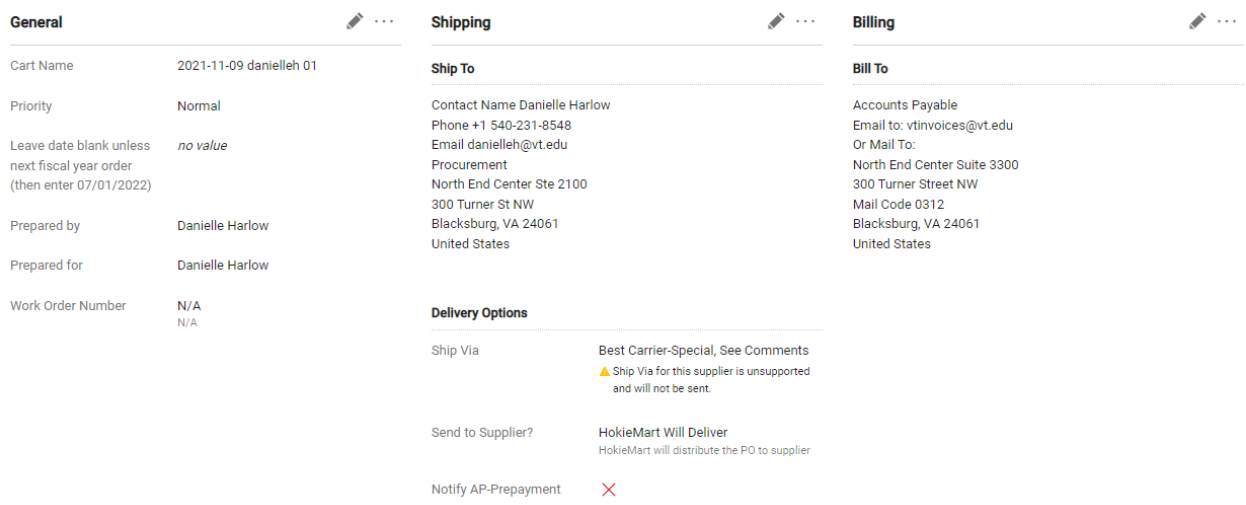
Final Review

After selecting "**Proceed to Checkout**," users will be ready to complete the requisition.

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



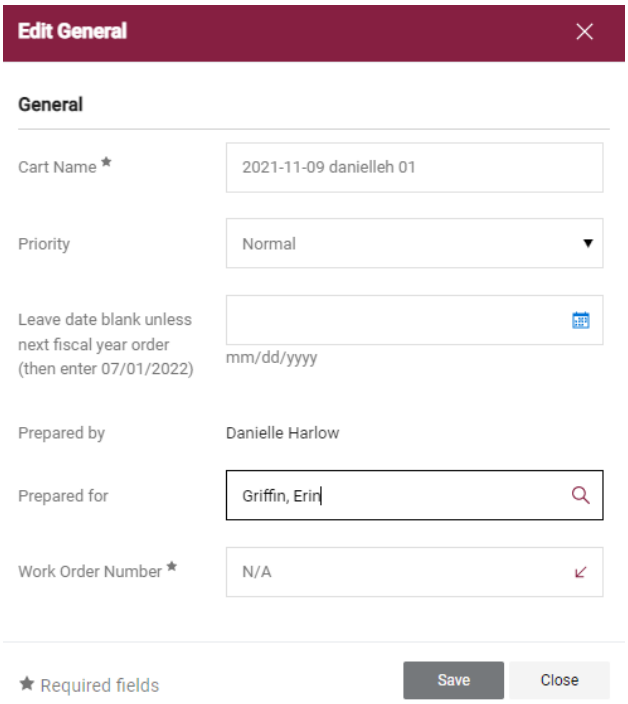
There is information the requisitioner may want to edit in the General and Shipping sections. The Billing section will always remain as the defaulted information.



General

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

.

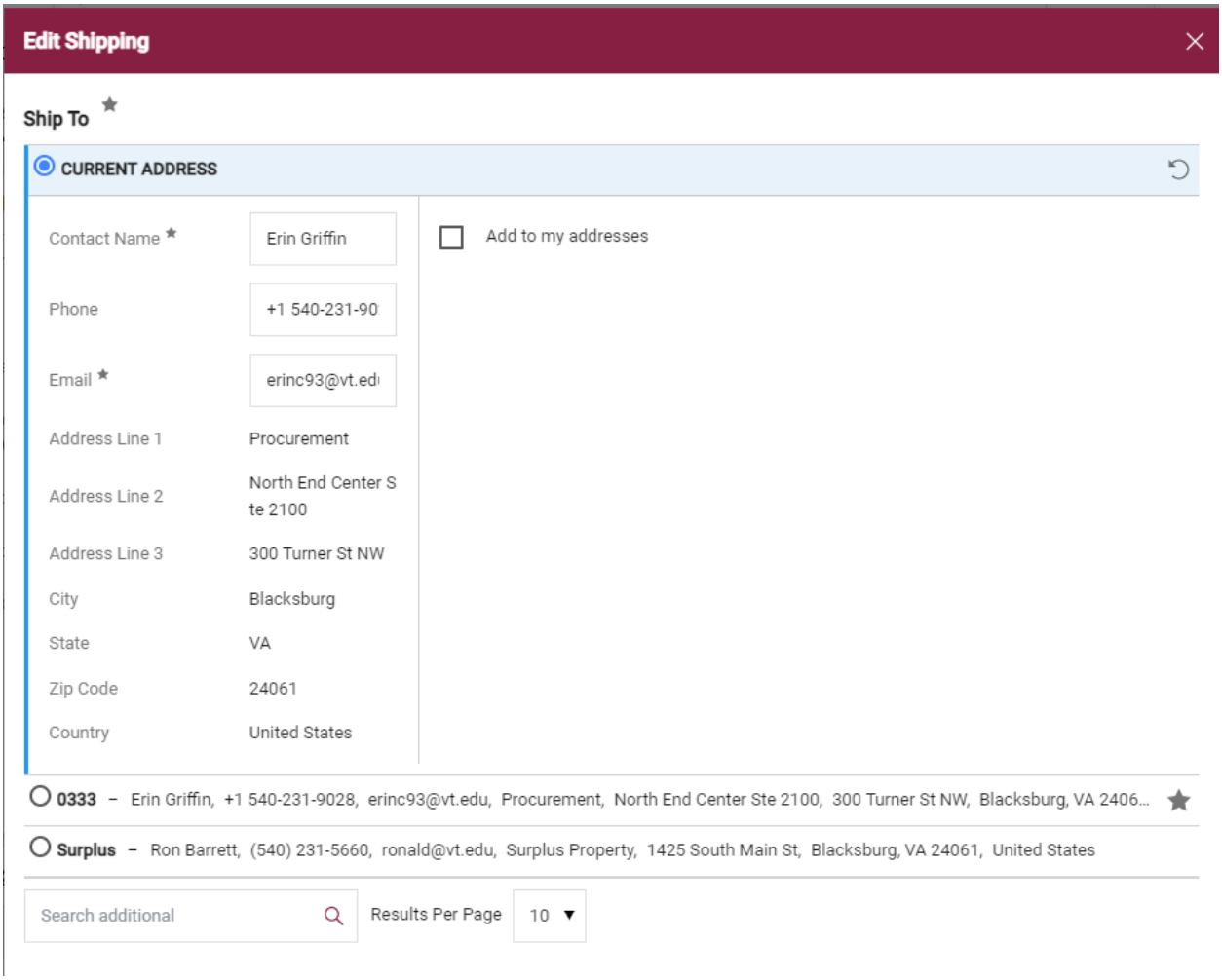


To prepare the requisition "On Behalf" of a different user, enter the name of the user you wish to purchase on behalf of and click Search.

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

Shipping

Shipping displays information regarding shipping and delivery data.

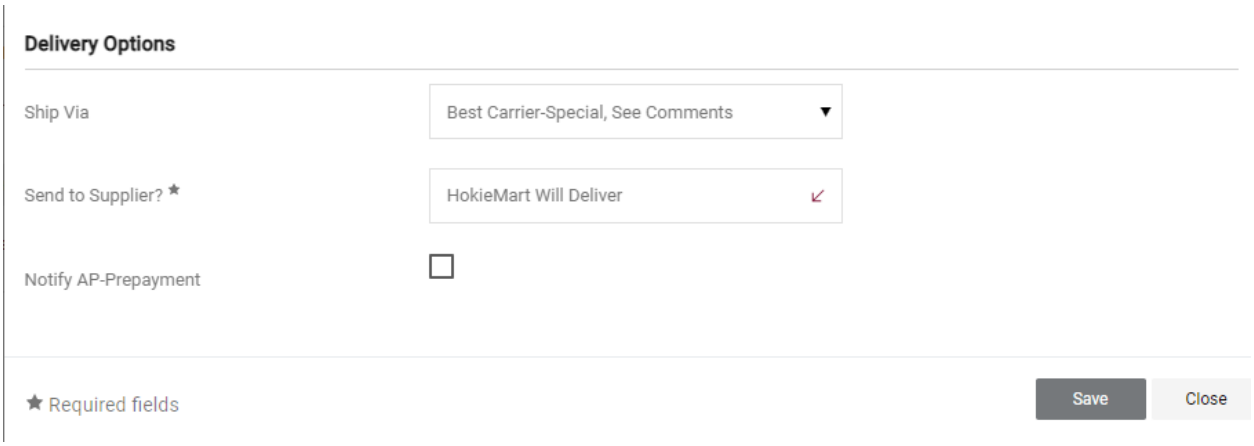


Users can edit the ship to address that they want their order to ship to here. All default addresses saved in the user's profile will appear first, or users can search for an additional existing address in HokieMart.

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

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

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



Internal/External Notes and Attachments

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

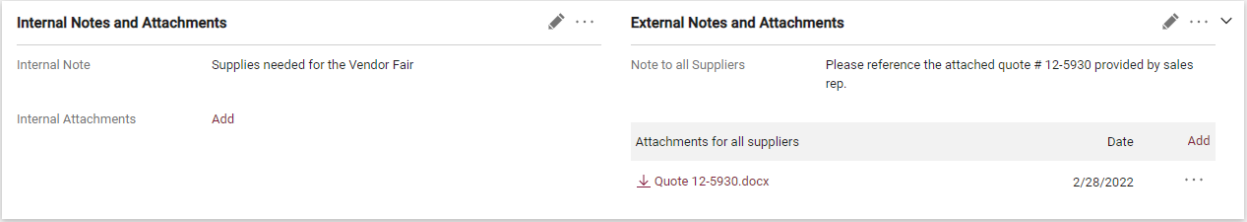
Internal notes and attachments remain internal to Hokiemart and are not viewable by the Supplier. Example uses are:

- 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.

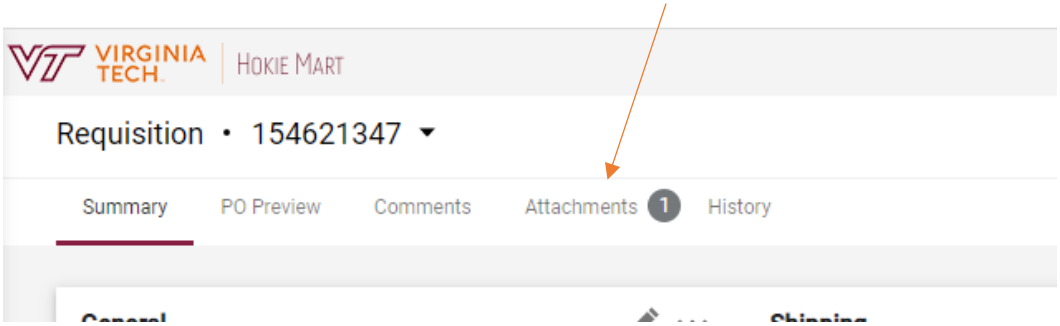
External notes and attachments are those intended for the Supplier to see. Example uses are:

- 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:



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

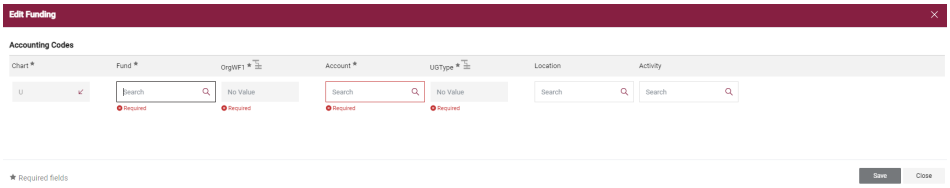


If you forget to add your attachment while processing your requisition, you can still add it through a comment after the requisition has been submitted or completed.

Funding Information

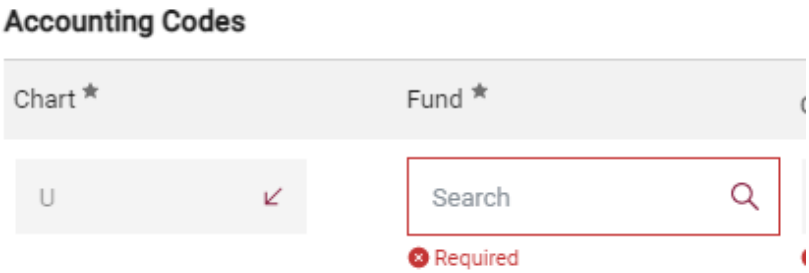
In this section, the fund and account are required. To edit or provide missing information, select “ ” The **Accounting Codes** box will open allowing:

- For changes to be made.
- Information to be added.

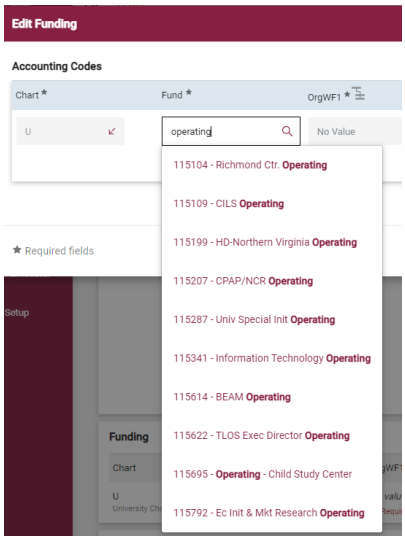


Fund

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

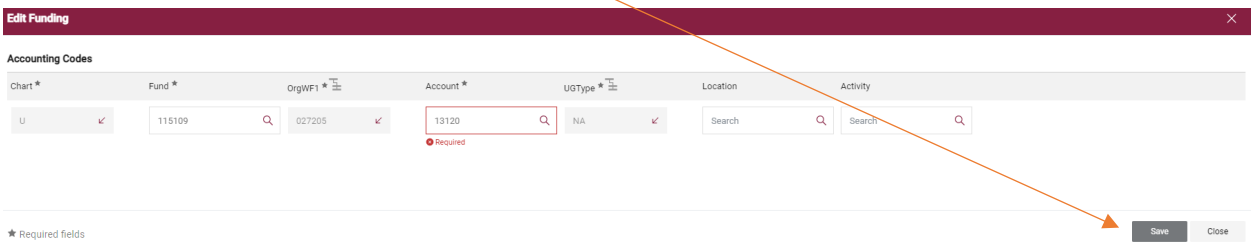


A listing of available funds will be displayed from a drop-down list.



Highlight the appropriate fund code and click to select it.

Then “Save”.



Account Code

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

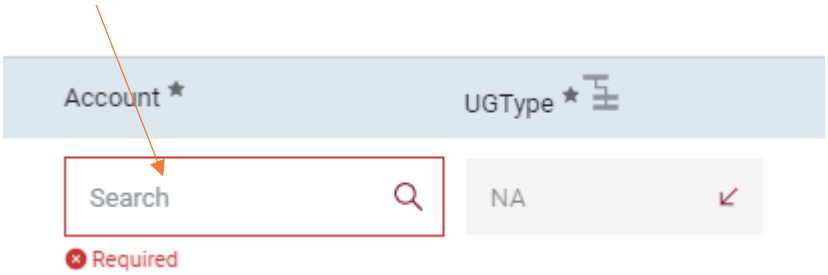
- If the Value (account code) is known, it may be entered.

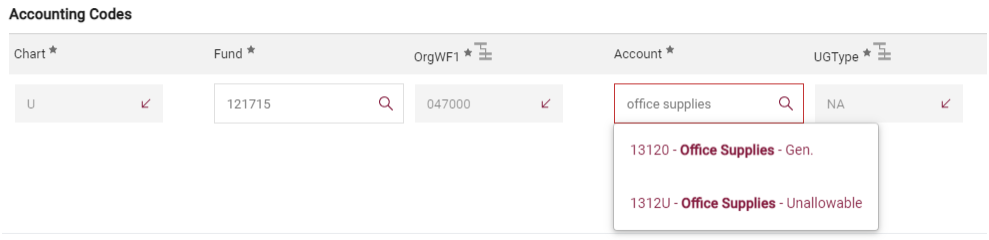
Frequently used account codes can be stored in the user’s profile. To learn how to add Account Code Favorites, see **User Information and Settings: Account Code Favorites.**

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

Searching for Account Codes

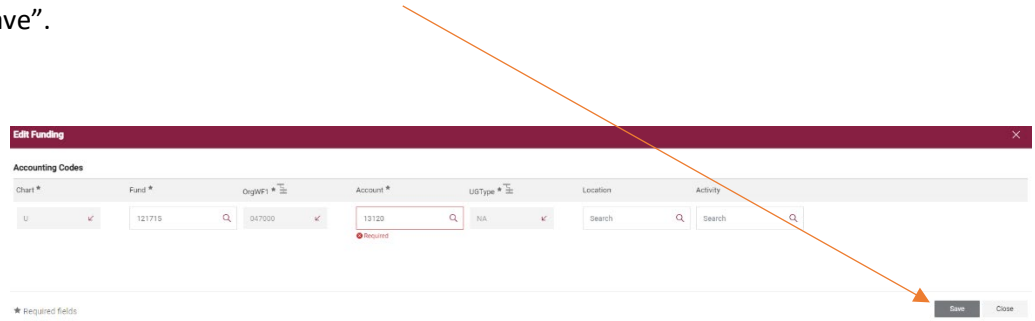
If the account is not available from the user profile, users may need to search for the appropriate account code. To search for account code type in the search field.





Highlight the appropriate account code and click to select it.

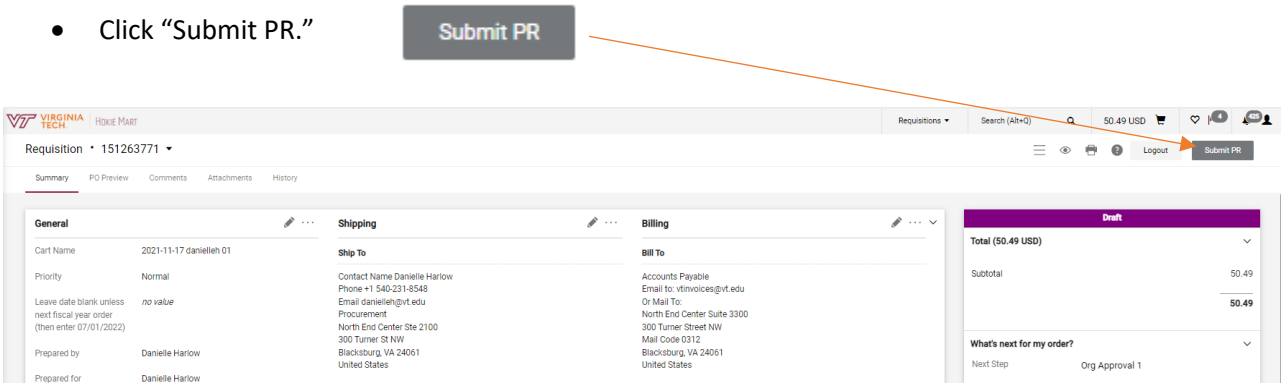
Then “Save”.



Submit the PR

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

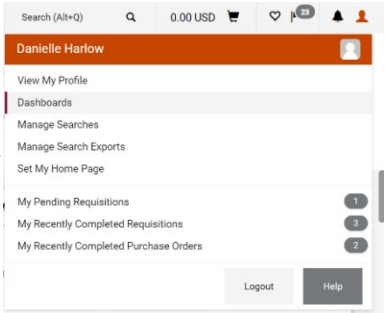
- Click “Submit PR.”



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

Withdraw the PR

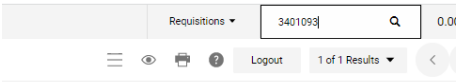
A Requestor can withdraw a PR at any stage **prior to it becoming a PO**.



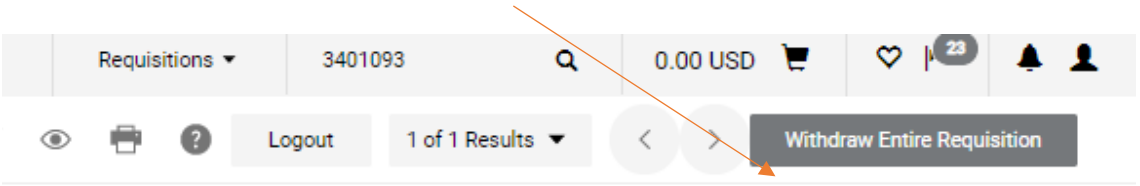
- Click on and select "My Pending Requisitions".

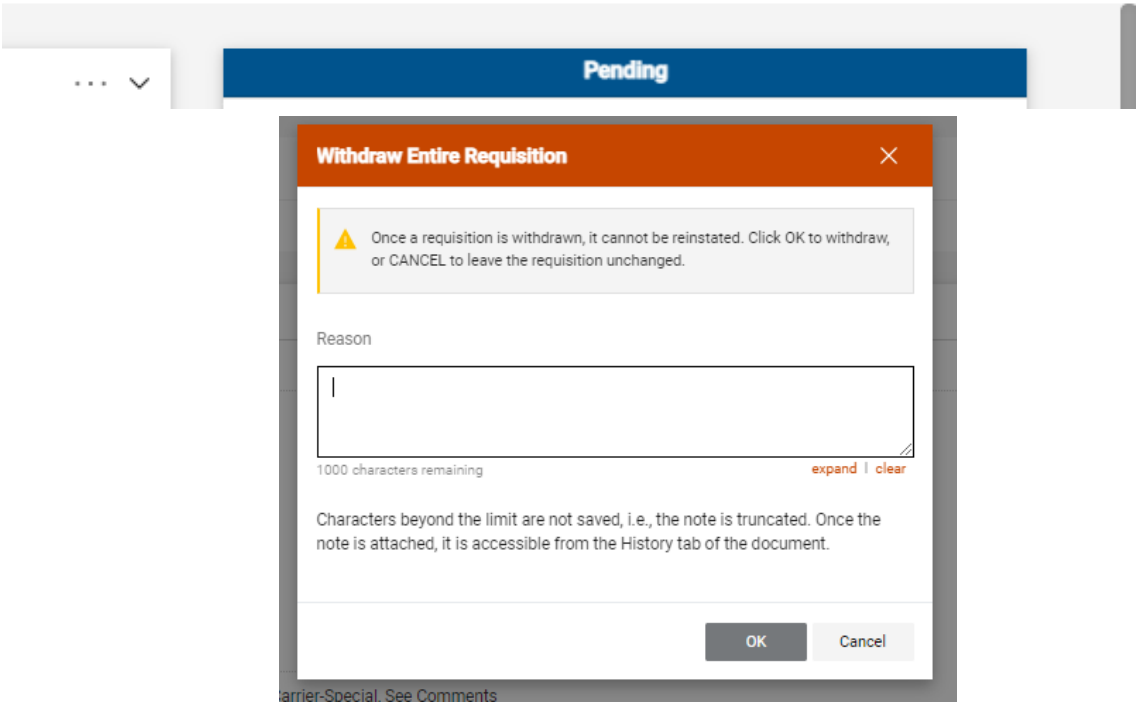
OR

- Perform a query by searching the PR number:



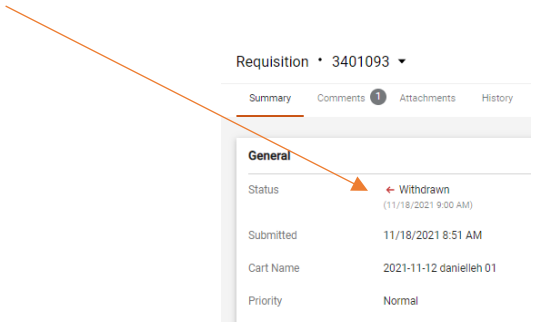
- Select and open the desired PR.
- In the upper right-hand corner of the Requisition select "Withdraw Entire Requisition".





- Include a comment for a reason for the withdrawal.

- Select “OK”.
- Status will be updated as “withdrawn”.



Return PR to Requisitioner

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

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

Requestor should:

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

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

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

Automatic Return of Requisitions Rejected by Banner

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

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

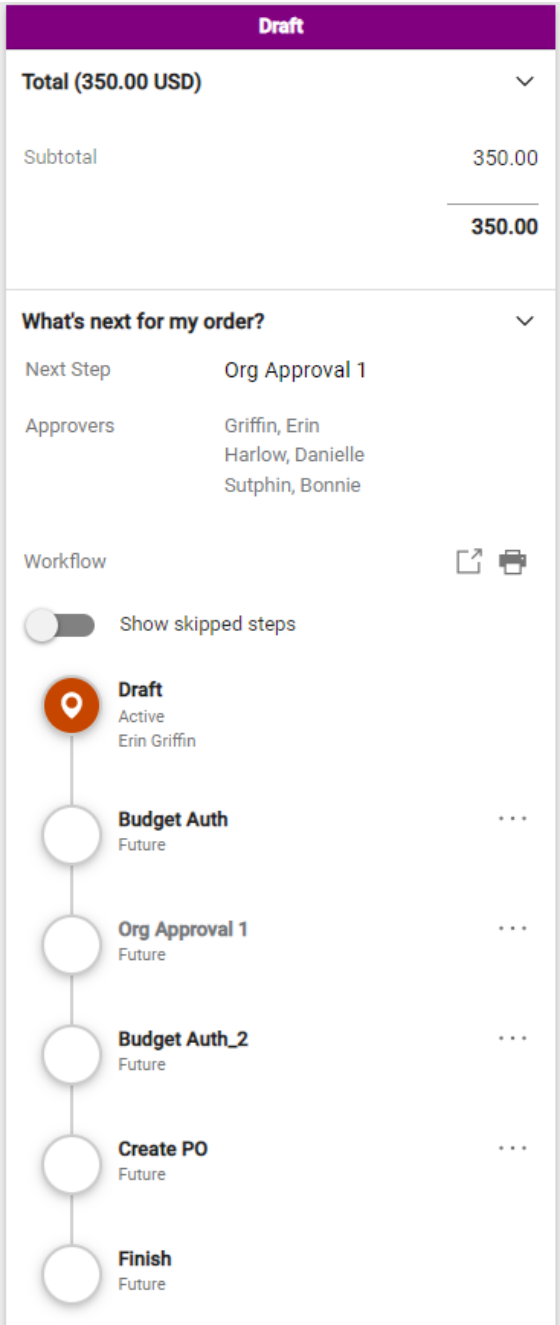
Note: ***The user must have “Cart/rejected/returned” checked in their email preferences to receive this automatic email. (See User Profile for more information related to this topic).***

Requisition and Purchase Order Follow Up

PR Approval Workflow

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

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



The 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 delivery:

1. Computer to Computer (CXML).

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

2. Fax.

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

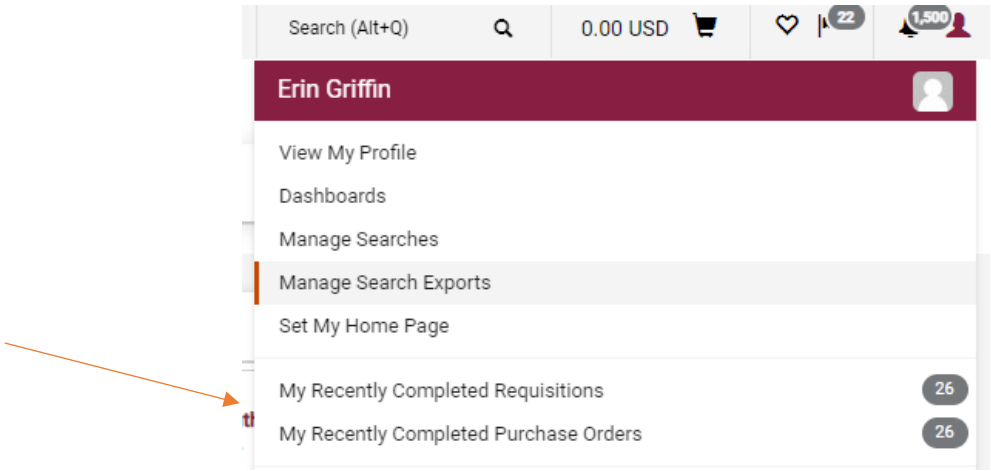
3. Email.

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

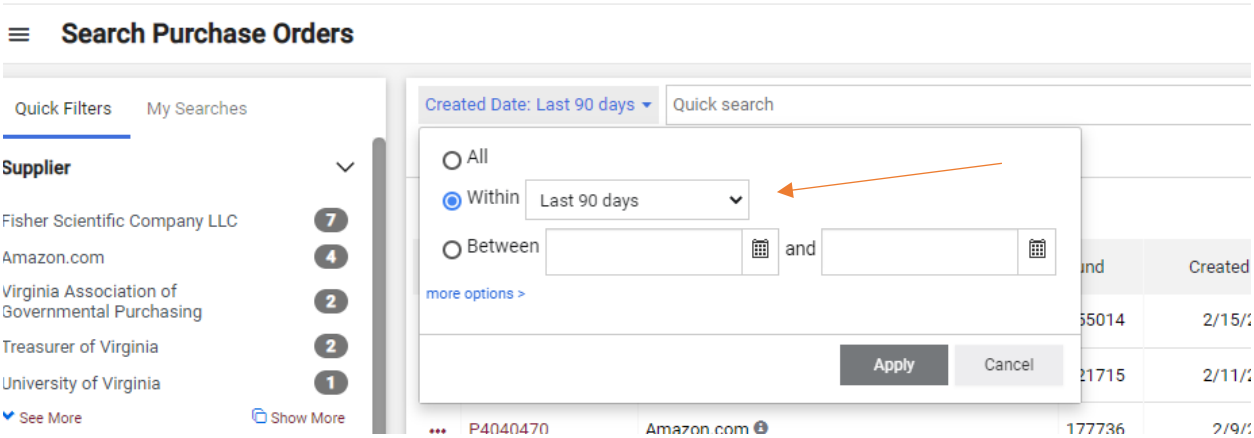
Please note that the method for delivery is determined by the vendor at the time of their setup.

Viewing PRs and POs

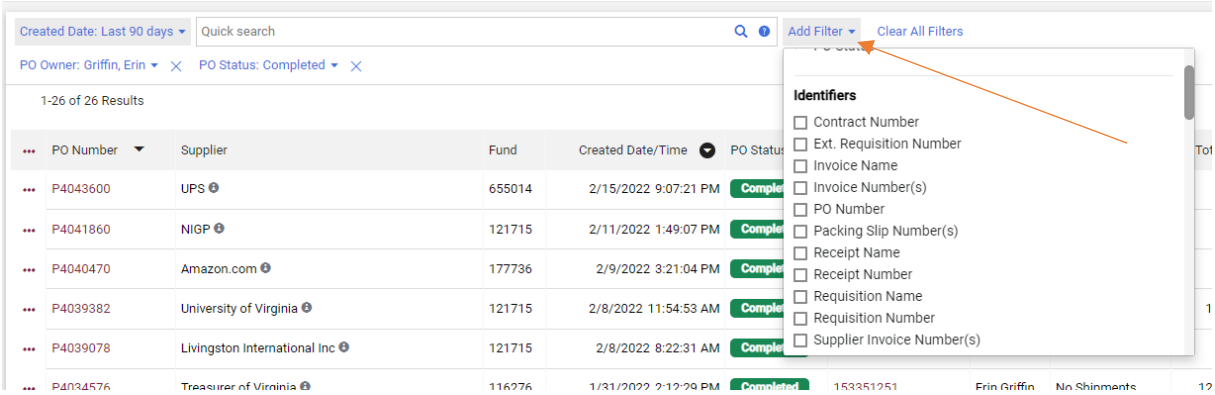
PRs and POs can be viewed for 90 days after completion using the drop-down menu located under the user profile.



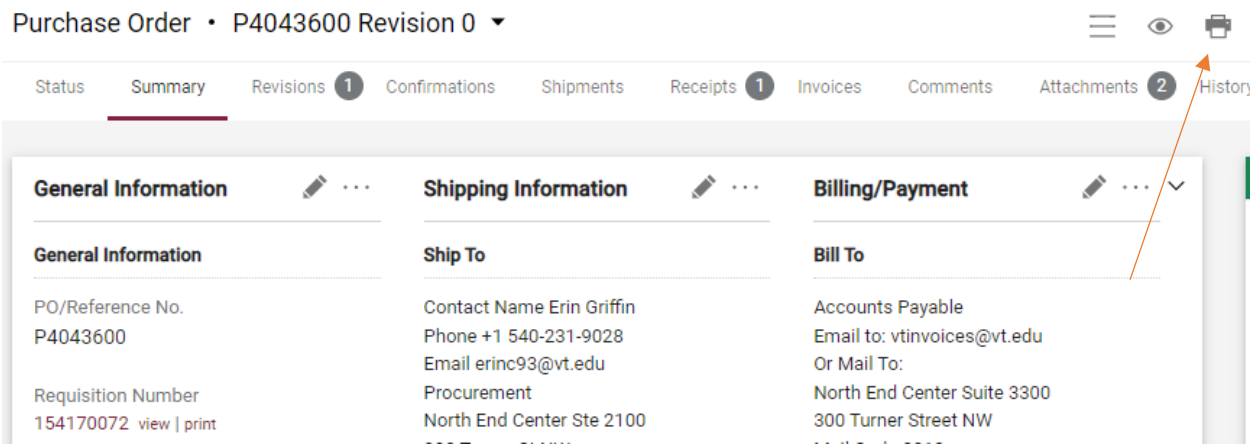
Or you can filter by date to view PRs and POs completed within certain time frames.



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



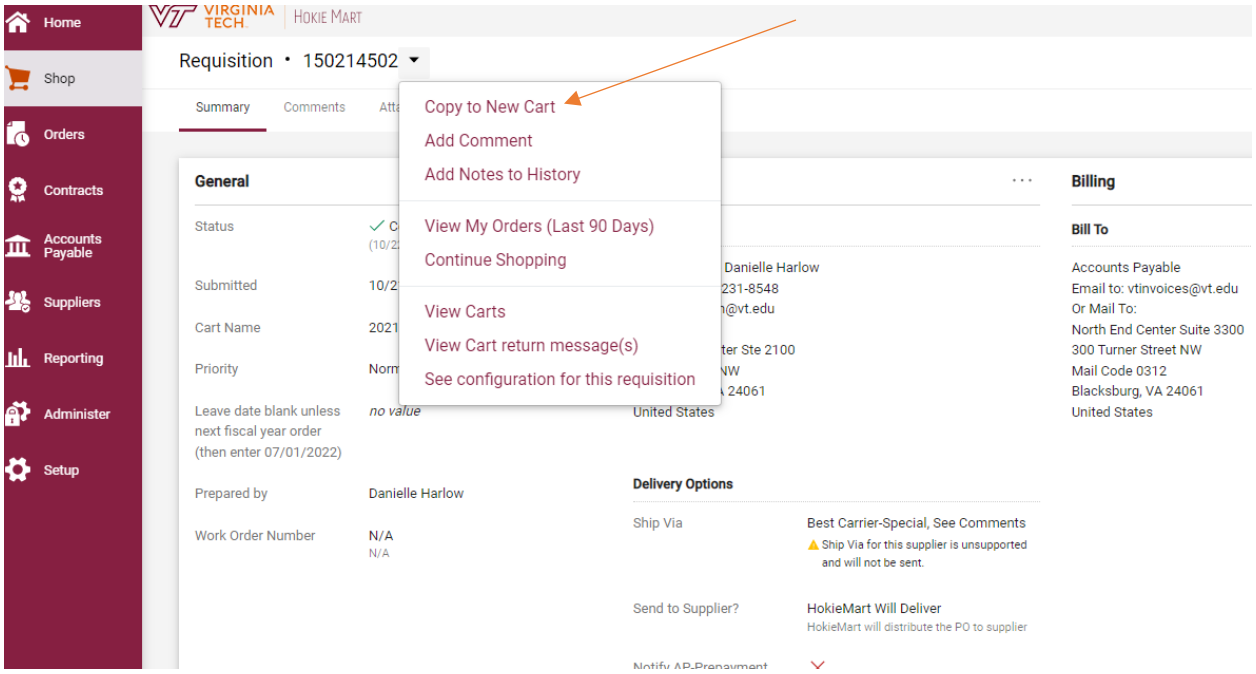
To print a copy of your PR or PO, click the printer icon at the top right-hand side of the screen. This will open the document in a new tab on your browser that you can print or save as a PDF.



Copying a Cart

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

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



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

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

Requisitions that were above departmental delegation 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.

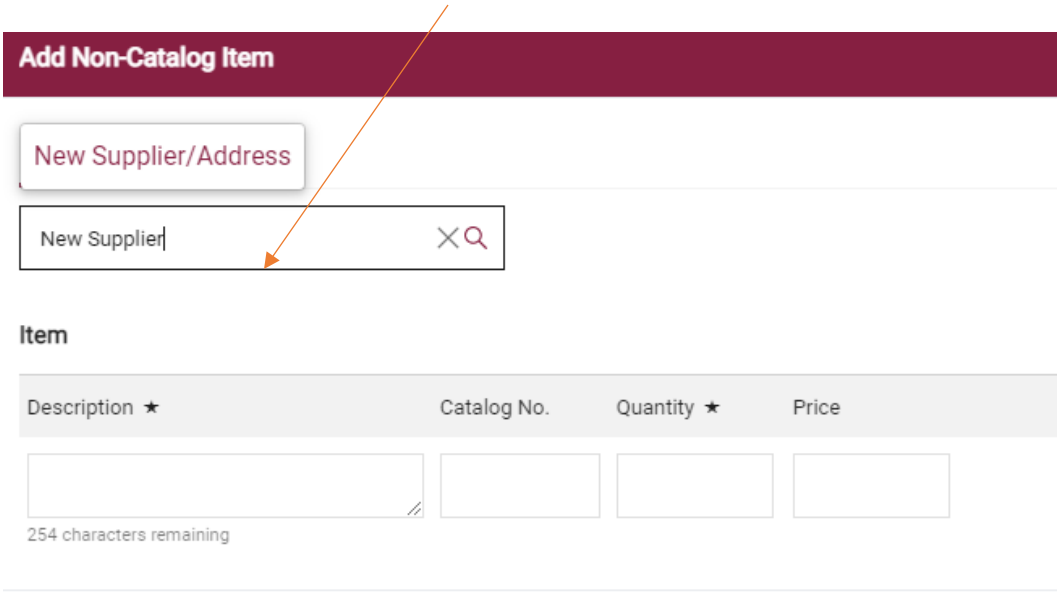
Note that a new vendor/supplier can be an individual or a corporate entity.

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

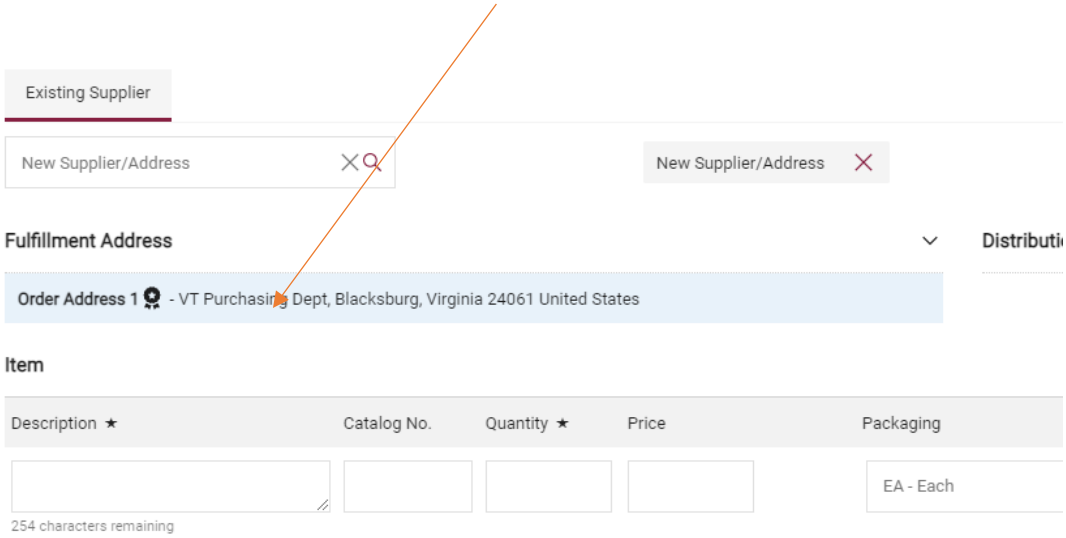
The requestor must select the appropriate form to process the order. New Supplier can be used on the Non-Catalog form or on the Payment Request Forms. If a new internal supplier is needed on the Interdepartmental Service Request form, please contact General Accounting at **genactg@vt.edu**.

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.



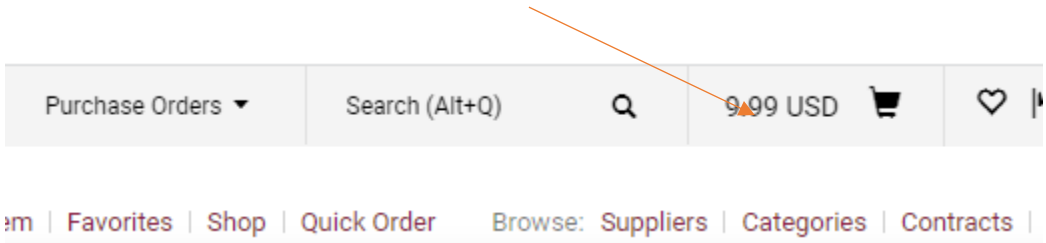
The selection of the Fulfillment Address will default to VT Purchasing (Procurement) Department.



Continue to complete the information for the item as usual:

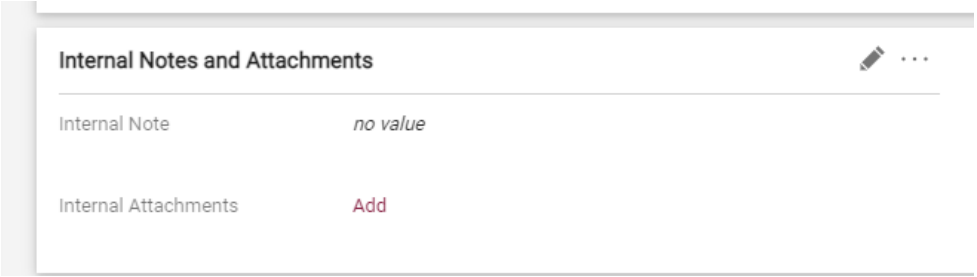
- Provide description.
- Catalog No. if necessary.
- Quantity.
- Price.
- Packaging.
- Click “Save and Close”.

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

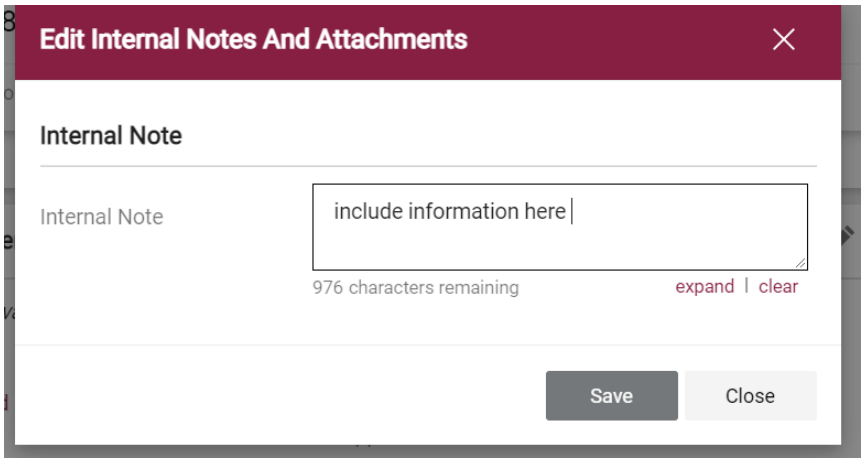


Click **View My Cart** to navigate to the Cart – Draft Requisition where the Cart can be reviewed and edited or click **Checkout** to proceed to input your Requisition information.

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



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



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.

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

Click Save and complete the PR.

New Supplier /Vendor Follow Up

The Vendor Team will add the new supplier if needed.

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

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

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

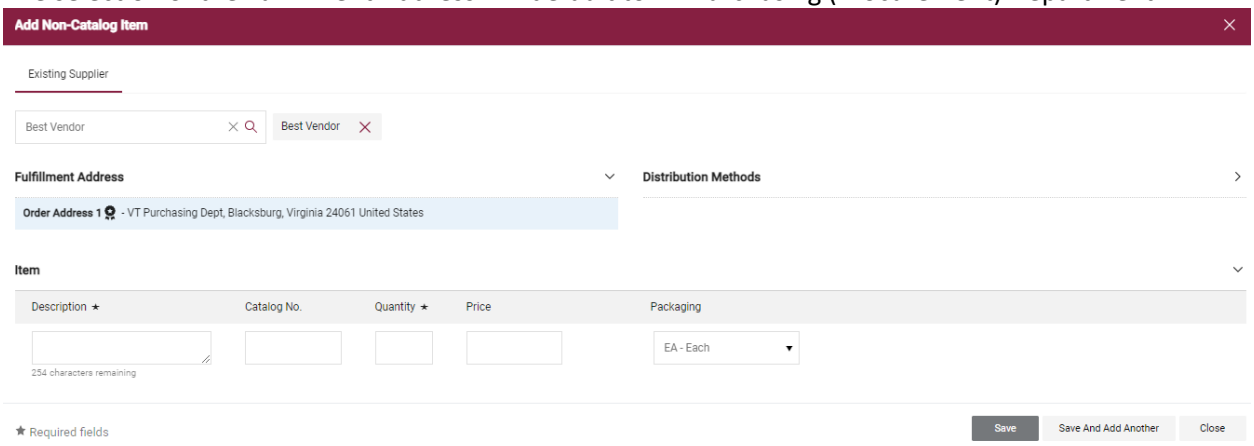
Best Vendor

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

From the Main Screen of HokieMart:

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

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



- Complete the PR.

Split Funding

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

- The entire purchase (header level).
- By line item.

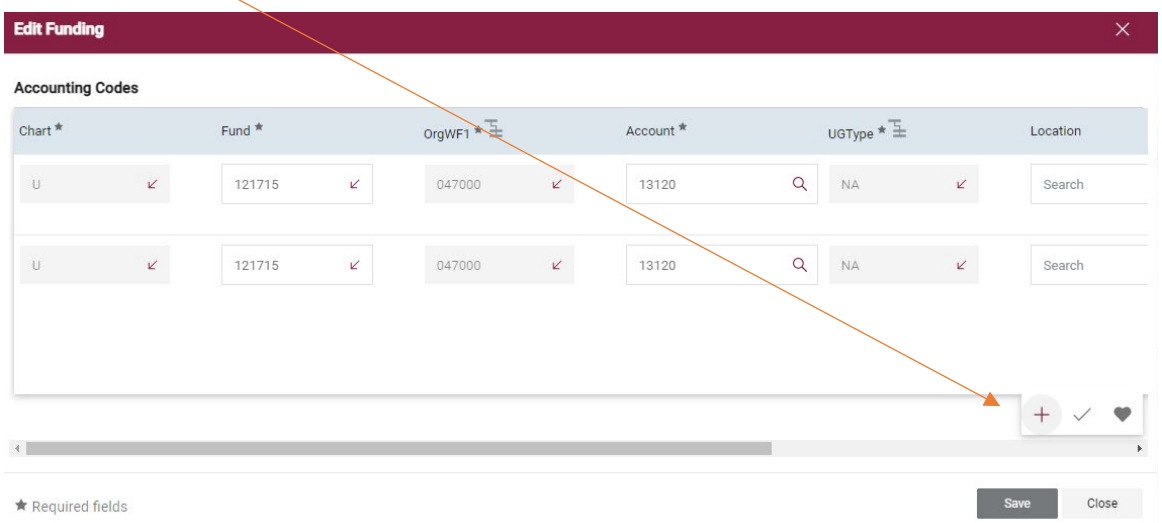
Split Funding at the Header Level

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

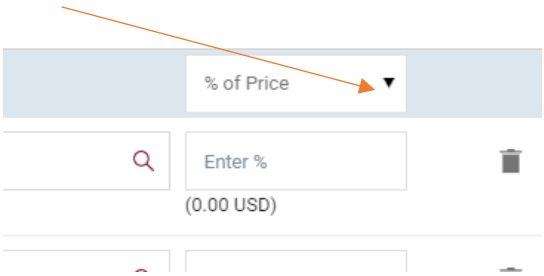
- Click the pencil icon in the right-hand corner in the Funding section to edit.

An **Accounting Codes** box will open.

- Click the + symbol to add a line of funding



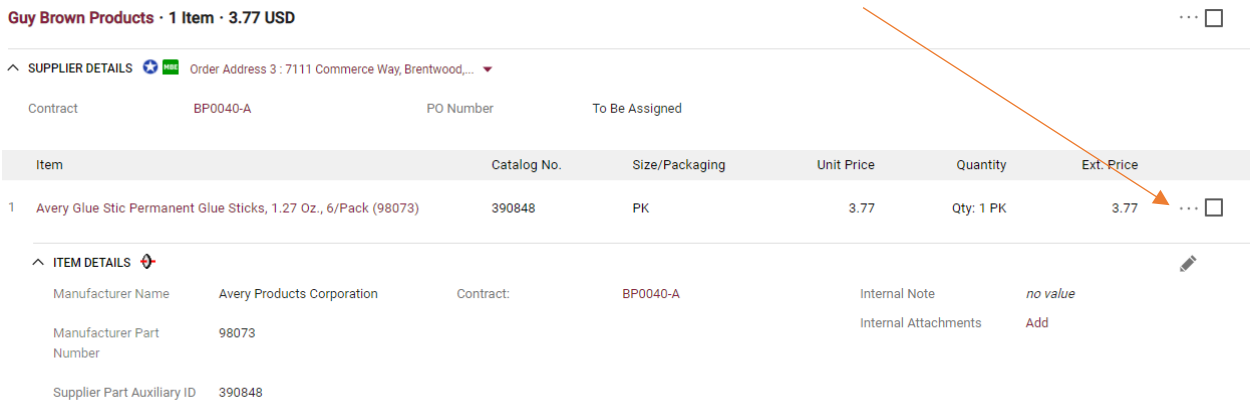
Selecting the down arrow will allow you to enter split amounts by % of Price, % of Quantity, or Amount of Price.



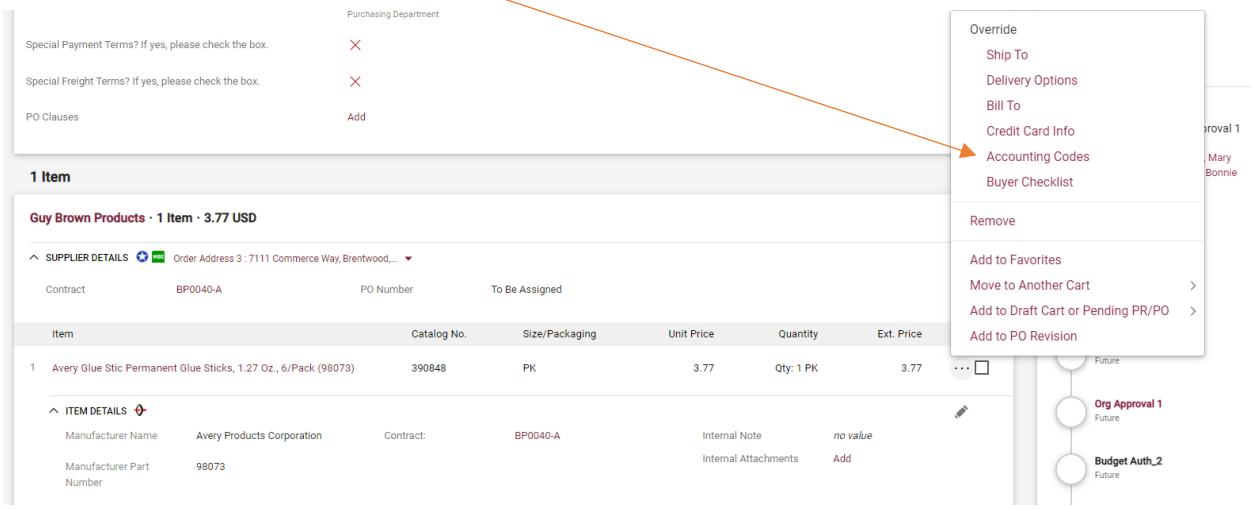
It is highly recommended that users select the "Amount of Price" option. The % of Price or % of Quantity options will likely result in failed orders due to the way that Banner and HokieMart do their rounding differently.

Split Funding at the Line Item Level

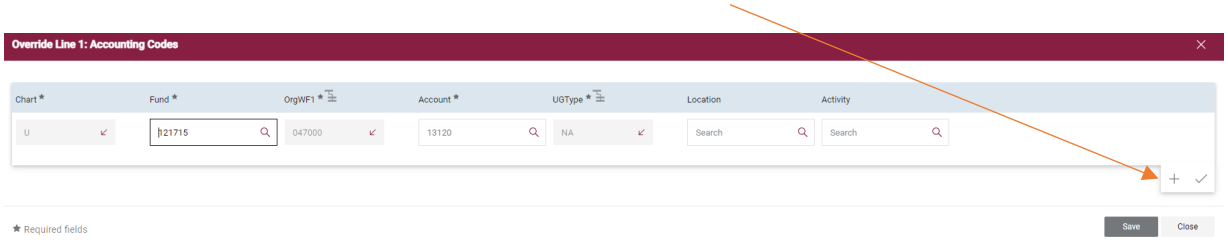
- Go to line item and select * * *



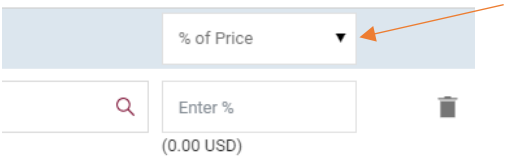
- Select **Accounting Codes**



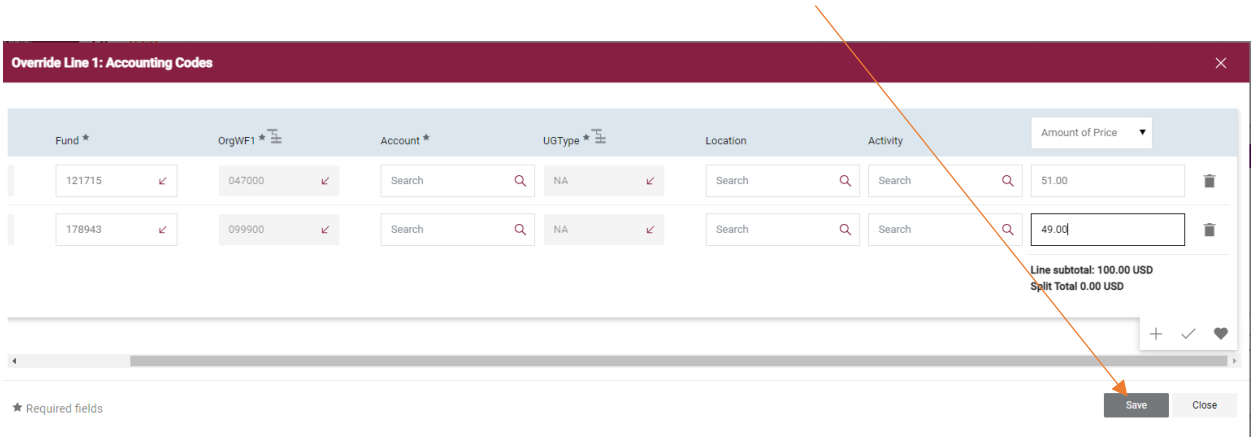
- To add another funding line, select the + symbol.



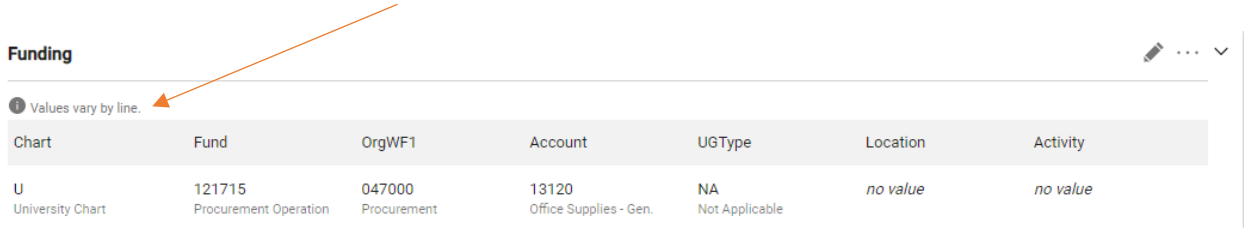
- Select the down arrow to enter split amounts by Amount of Price.



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



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



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

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

Shared Department (or On Behalf Of)

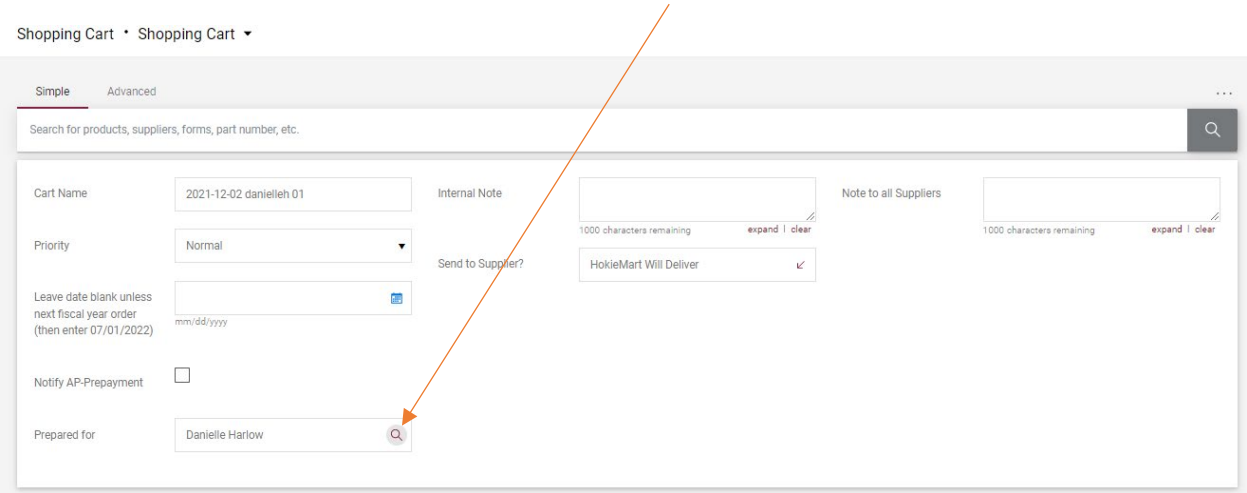
The purpose of a Shared Department PR is when a department is sharing the cost of purchasing particular goods or services with one or more departments.

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

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

<u>Option #1:</u>

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

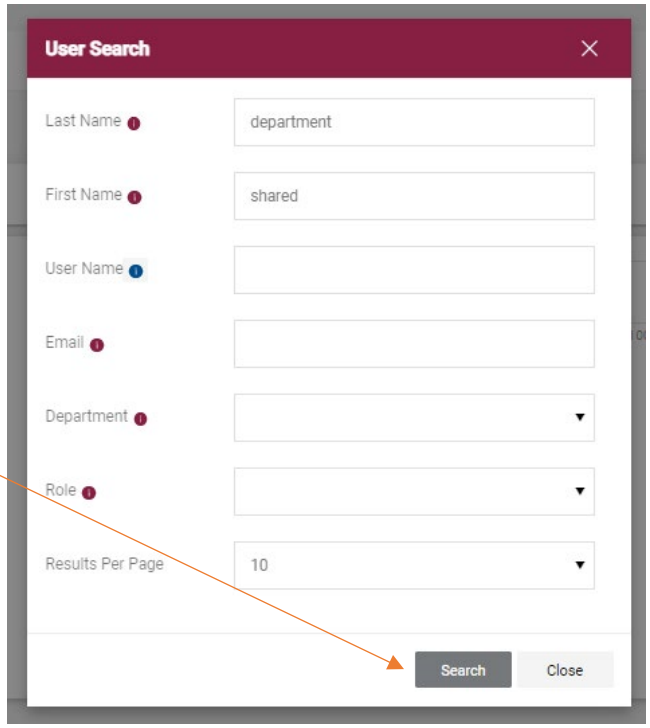


Search for the user "Shared Department."

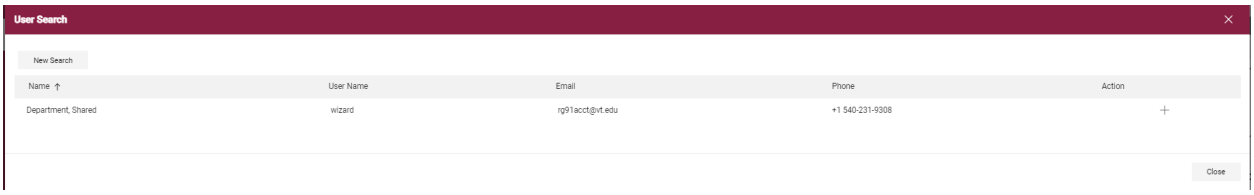
- Last Name: **Department.**
- First Name: **Shared.**

Then click **Search.**

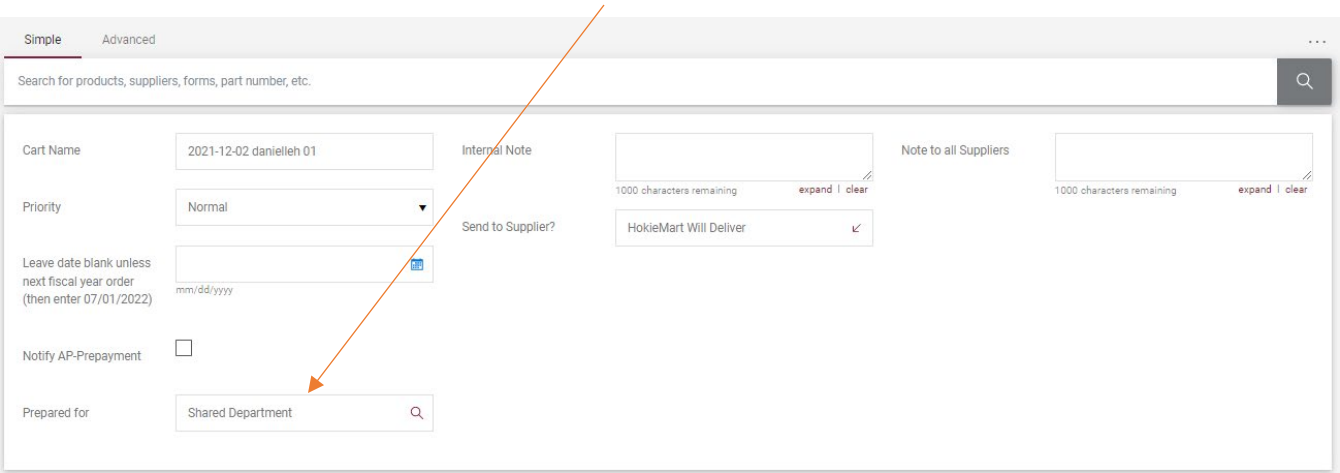
If you're an On Behalf of Requestor entering the order on behalf of another user in your department, you would search for that user here.



Select the “+” symbol to add the Shared Department user to your Shopping Cart.



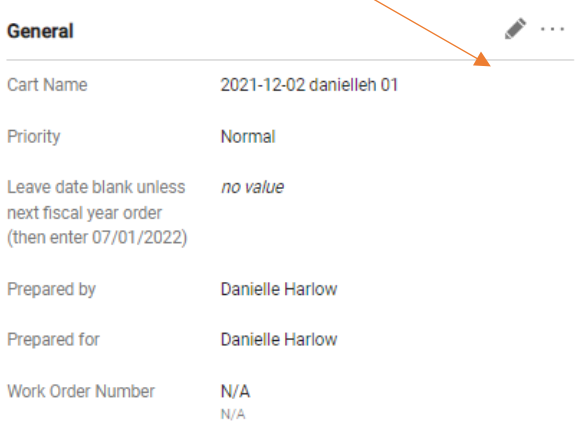
The Shopping Cart has been updated to reflect “Shared Department” or another user.



<u>Option #2:</u>

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

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



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

Adding a Comment

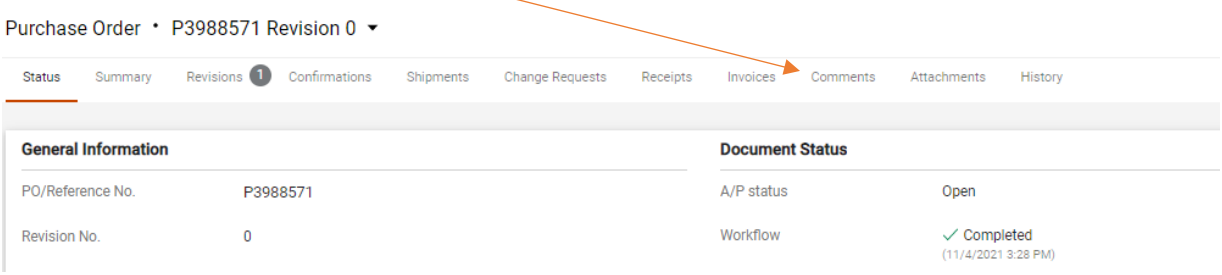
Adding Comments to PR or PO

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

- To notify an Approver or other HokieMart user that a PR is ready for approval.
- To add an attachment.
- To add a comment to a document after it has been completed.

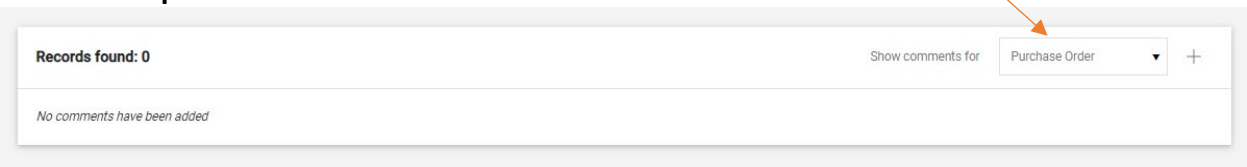
To add a comment:

Select the **Comments tab**.

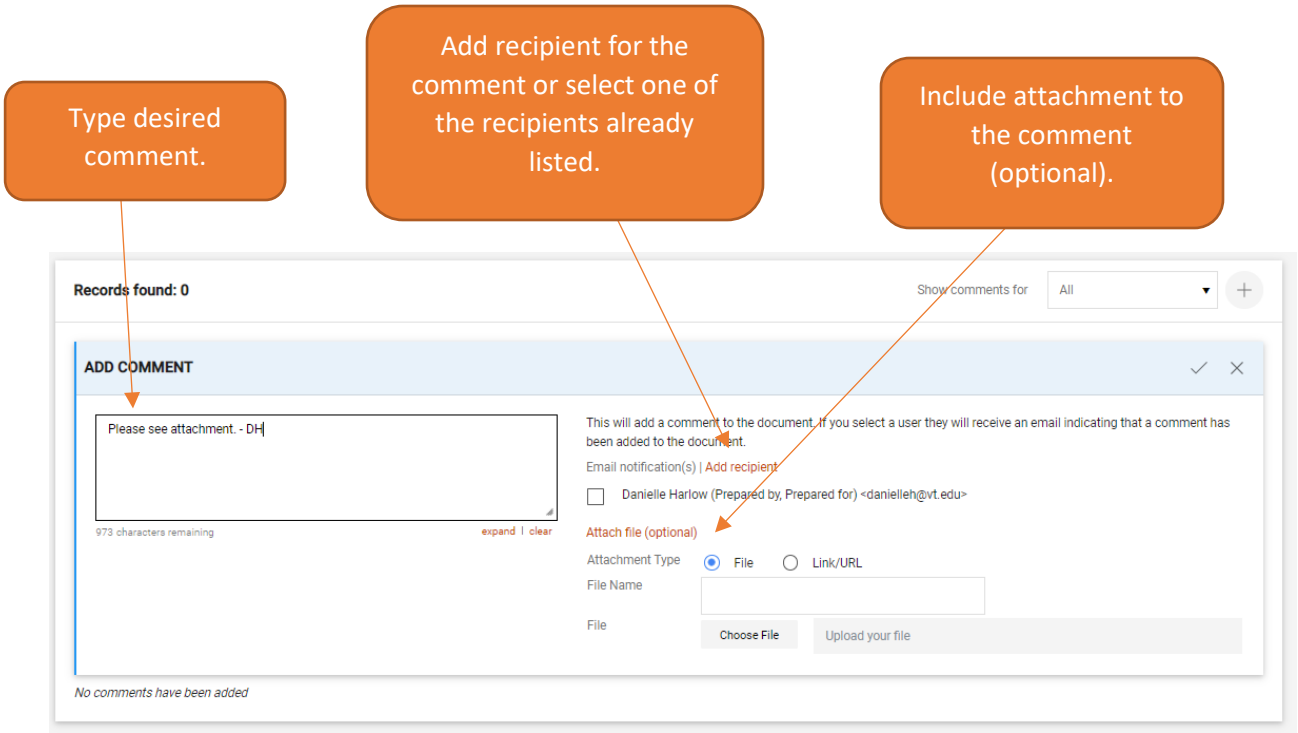


The drop-down menu will allow user display comments from:

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



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



When satisfied with comment select symbol.

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

SCHEV Orders

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

- 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

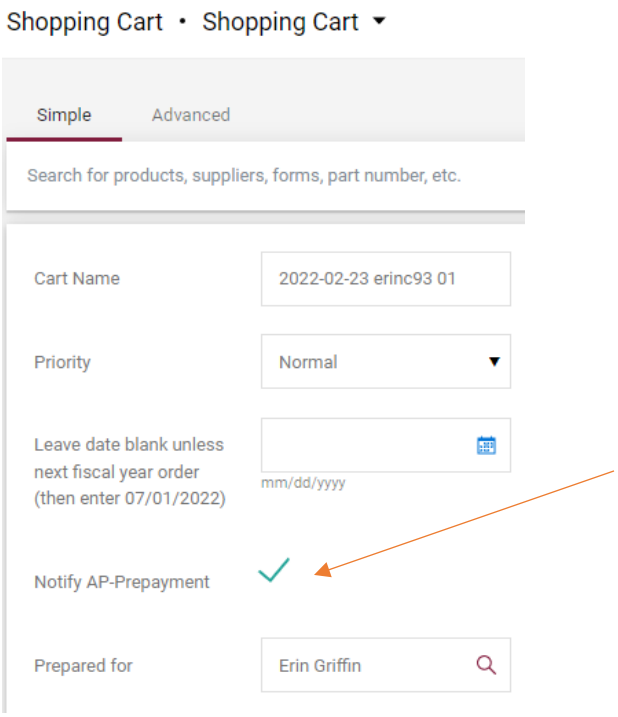
SCHEV orders to the same vendor should be consolidated to one PO if possible, rather than placing a separate PO for each item ordered on SCHEV funding to the same vendor.

Prepayment Notification

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

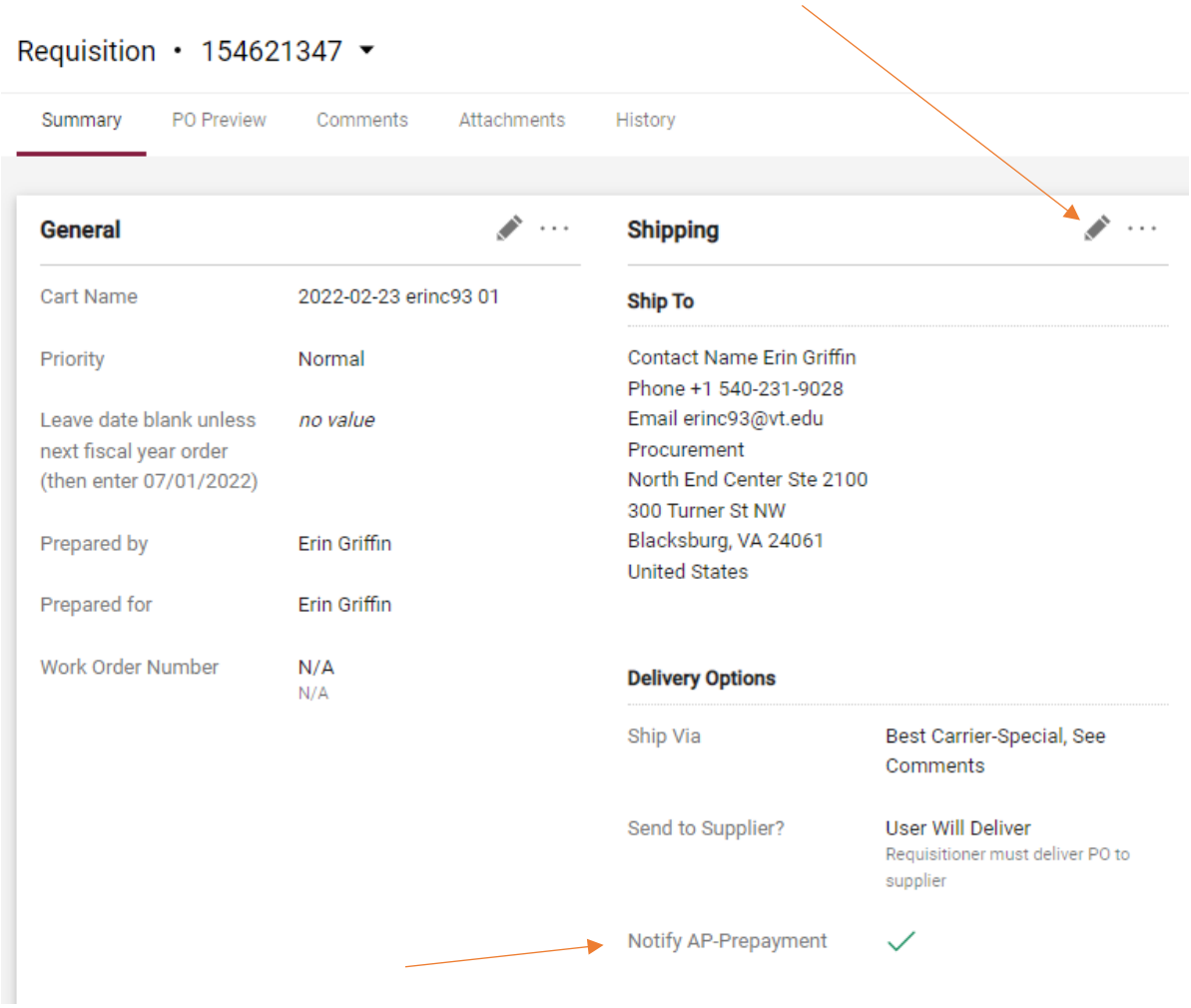
Although it is not the policy of the university to prepay for goods and/or service, there are times a vendor/supplier must be paid in advance, such as magazine subscription, conference registration or a partial deposit payment. Another common prepayment is for events where the check is to be presented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

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



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

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



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

Guidelines for Prepayments

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

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 pre-established payment types. The payment types are defined by Procurement's payment categories. A list of payment categories 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 will go through the purchase requisition process on the non-catalog form.

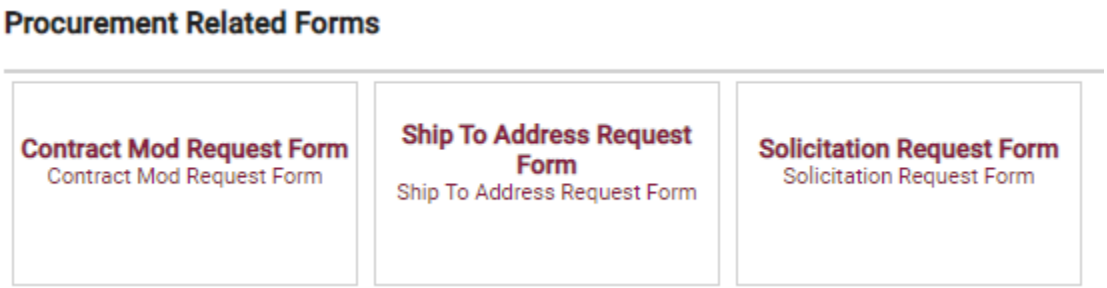
Payment Request Form Processing

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.



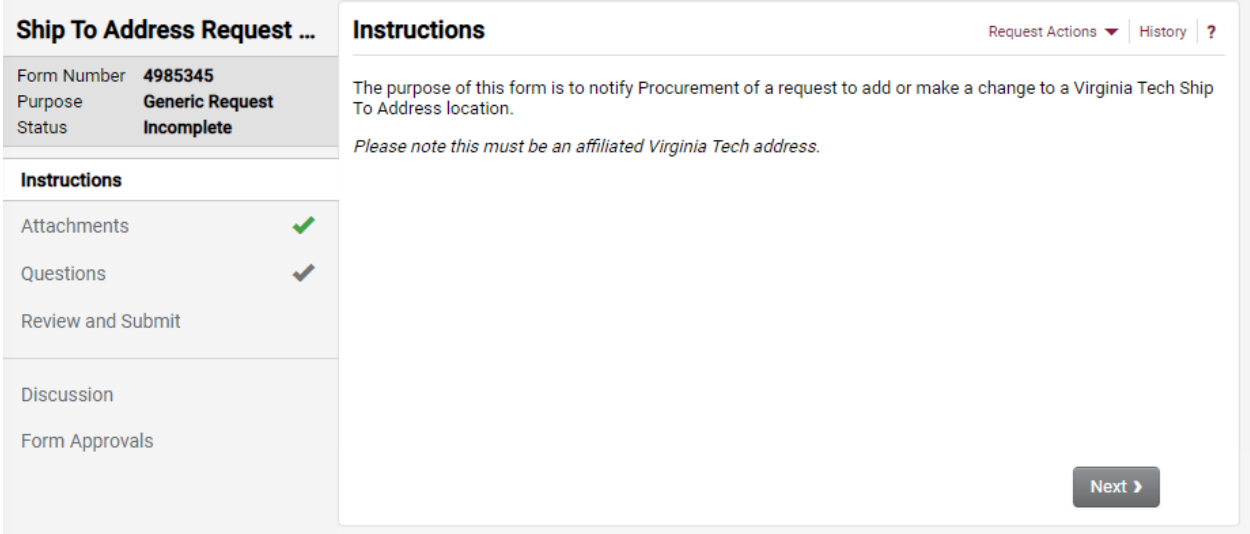
These forms are not used to purchase goods or services, but rather are used to make various requests to Procurement.

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.

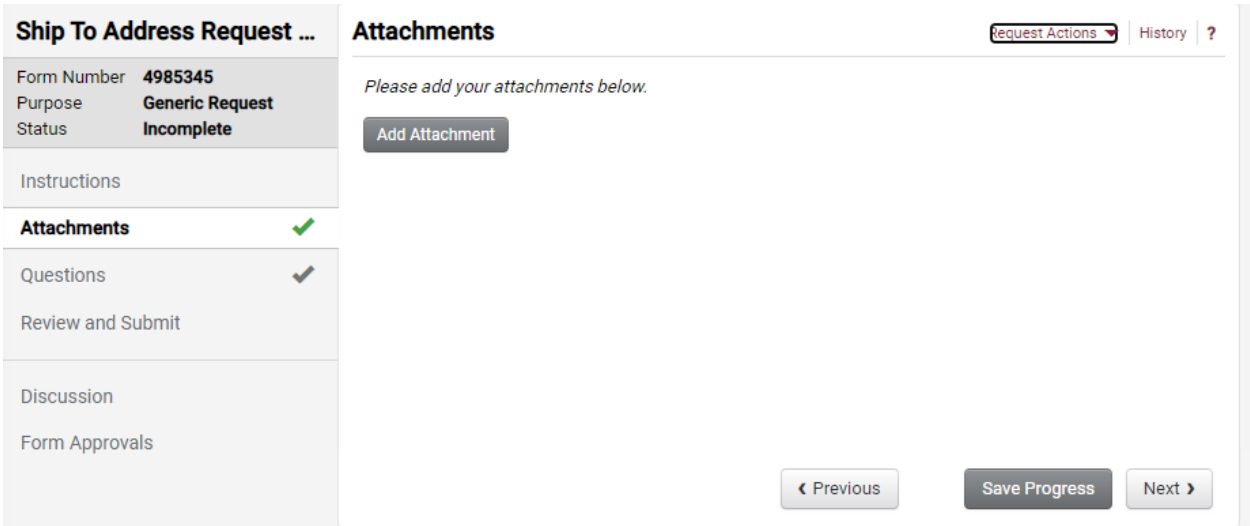
Instructions



The 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.

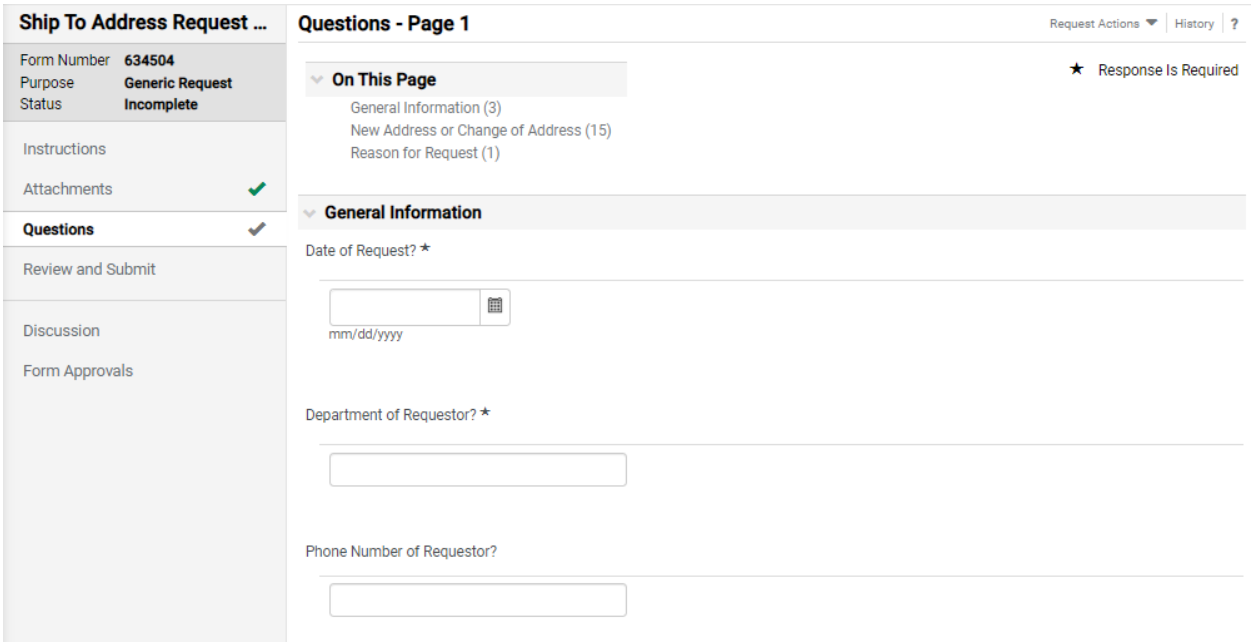
Attachments



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.

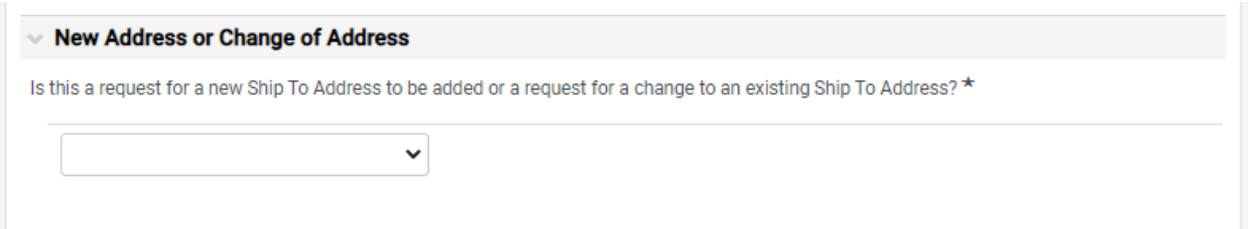
Questions

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



- 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.



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

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 *

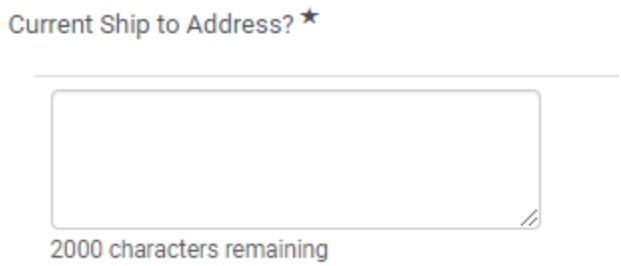
Zip Code *

Current Virginia Tech Mail Address at this Location?

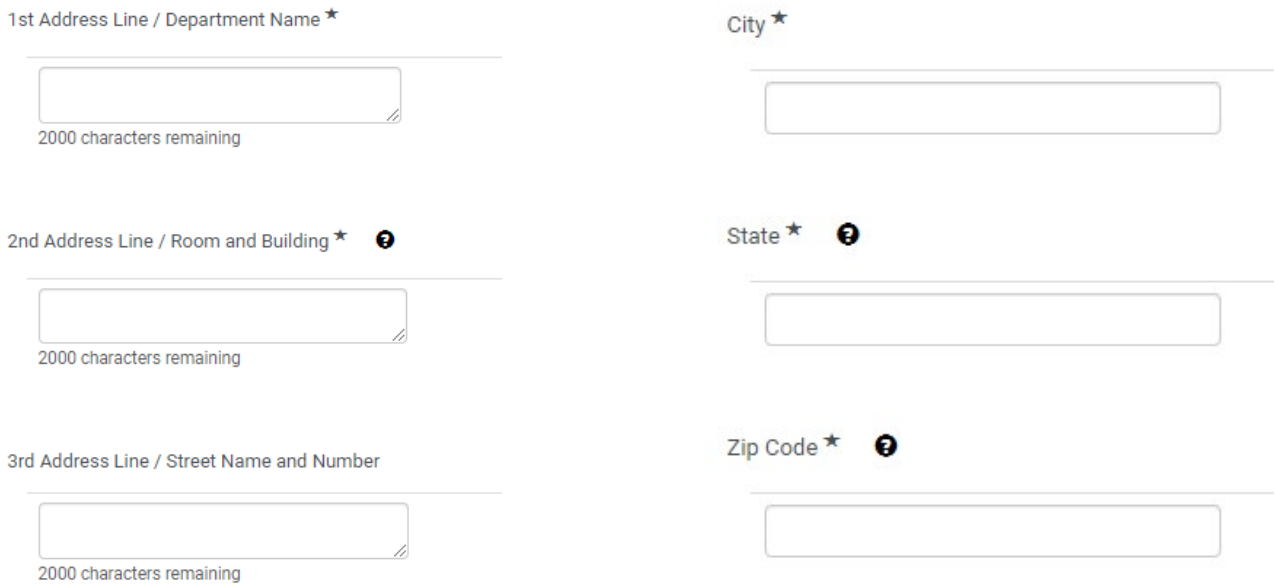
2000 characters remaining

- 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



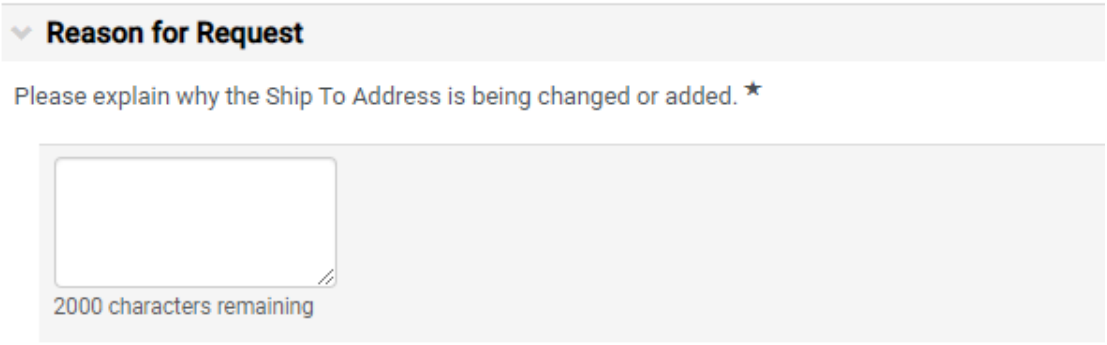
- Enter the Current Ship to Address that needs to be edited.



- 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.

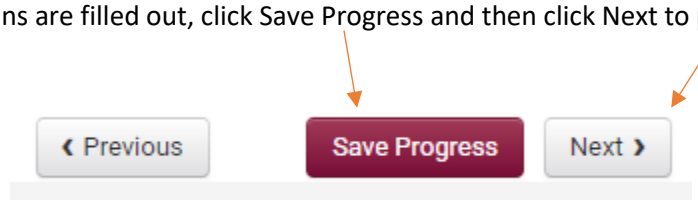
Please note, enter information in each box, even if it is staying the same.

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



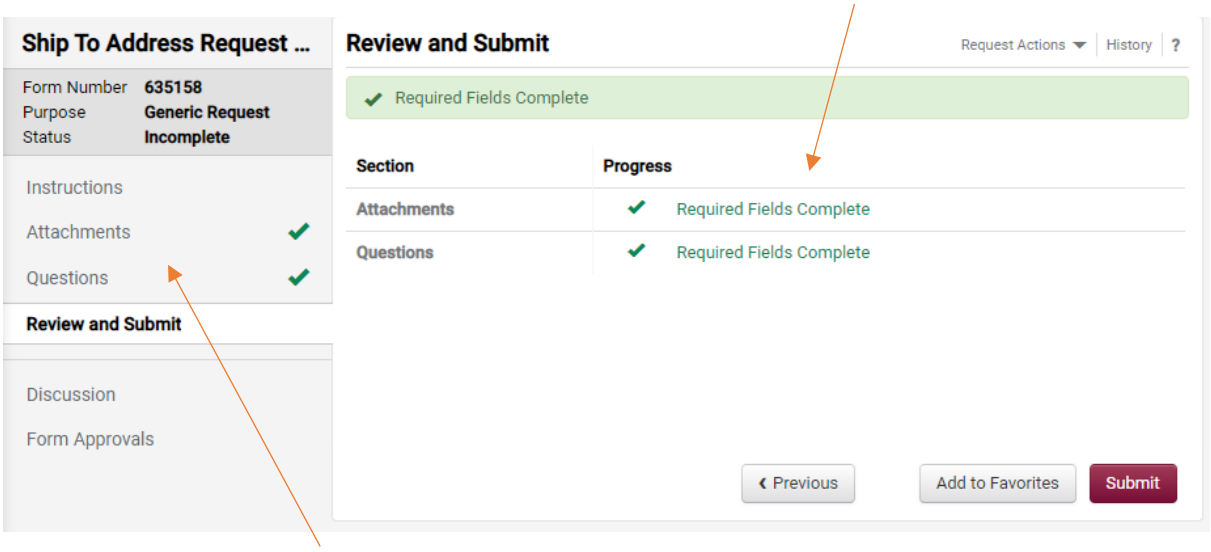
For example, a department may have moved offices and needs their ship to address updated or there is a new building established on campus that needs a new ship to address.

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



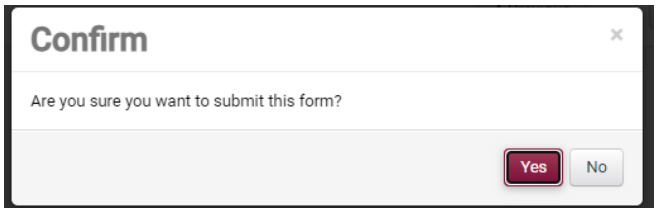
Review and Submit

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



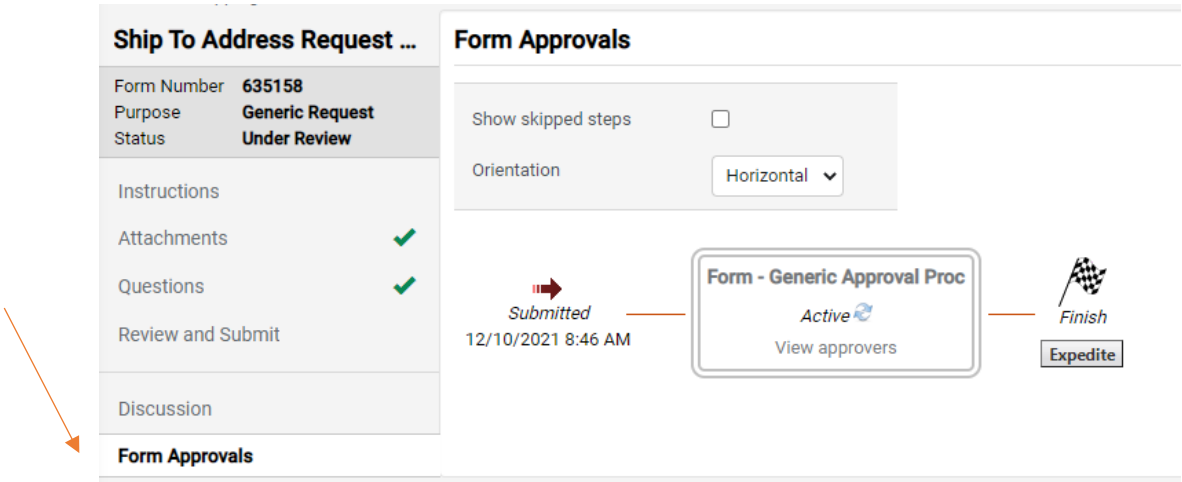
If any of the required fields were not completed, you can use the menu on the left-hand side to navigate back to the tab that needs to be fully completed before submission.

Once everything is complete, click Submit.

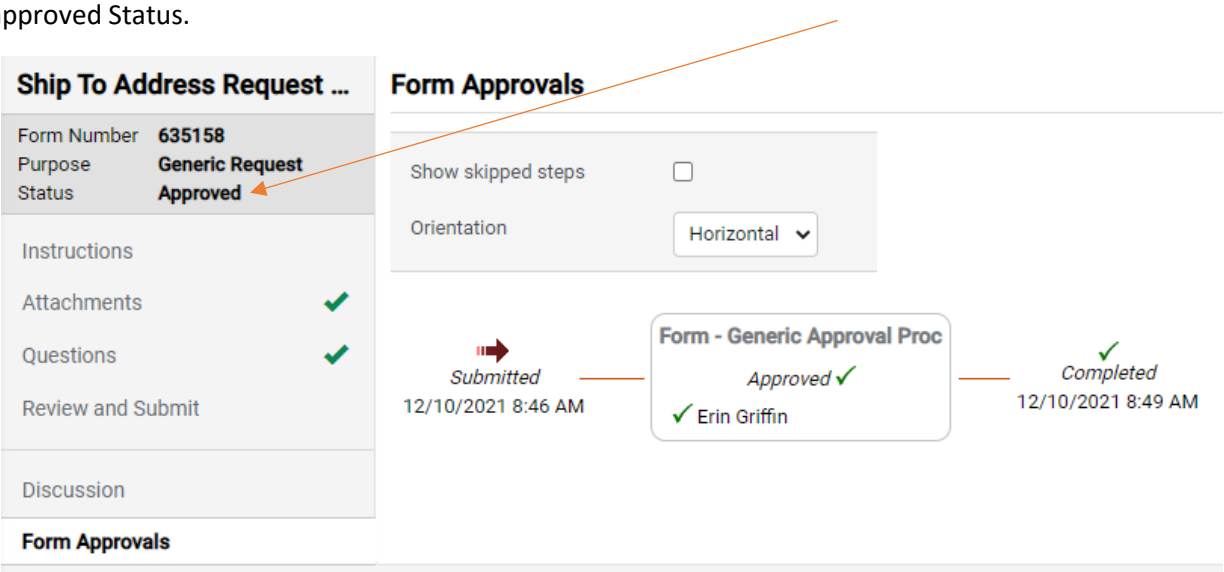


Select Yes to confirm submission of the form.

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.



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.

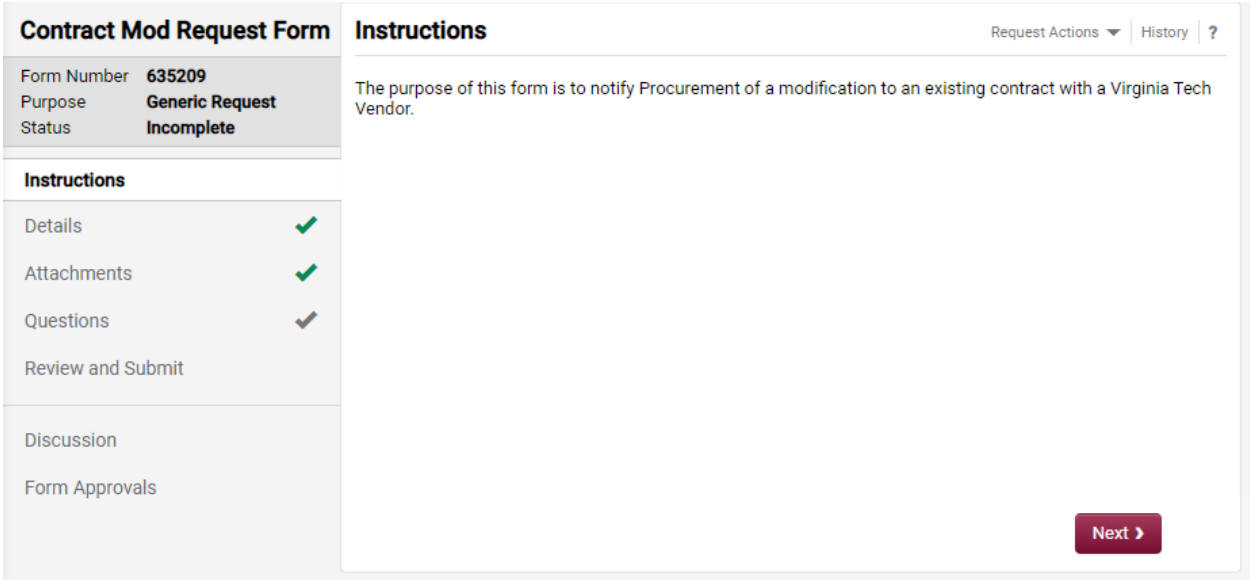


Contract Mod Request Form

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

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

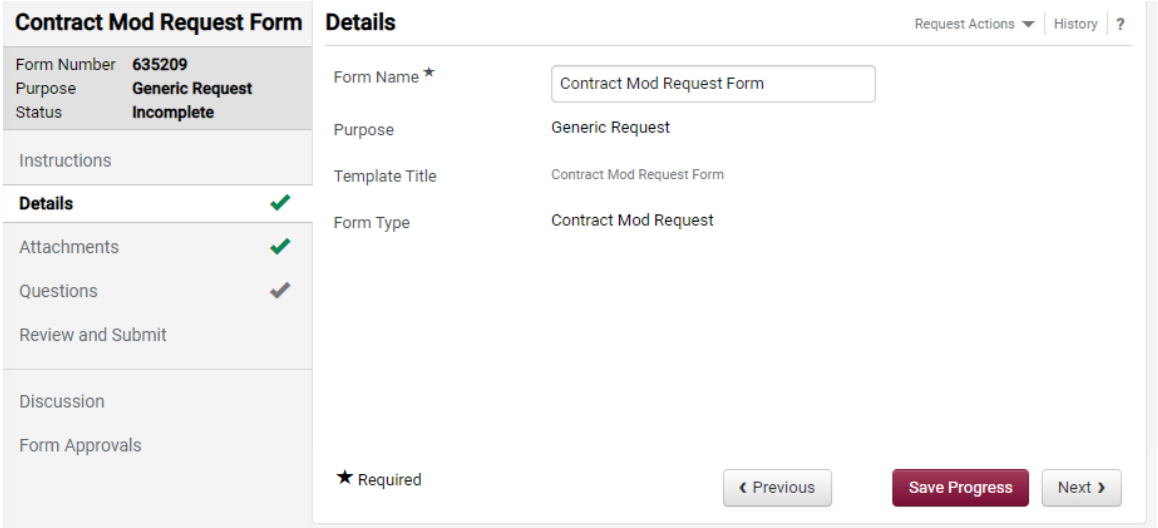
Instructions



The 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.

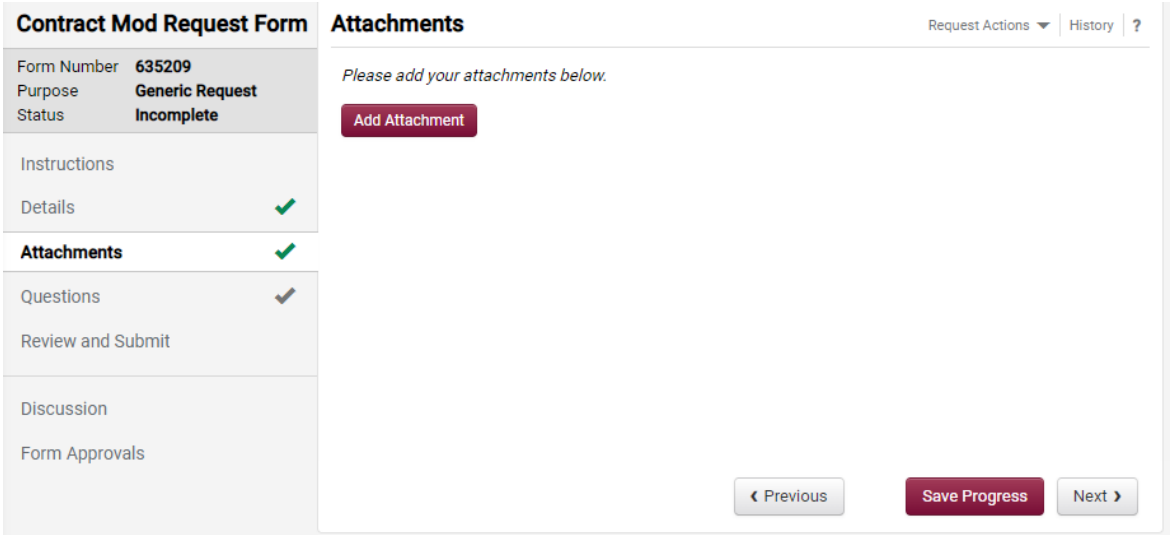
Click Next to begin your request.

Details



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.

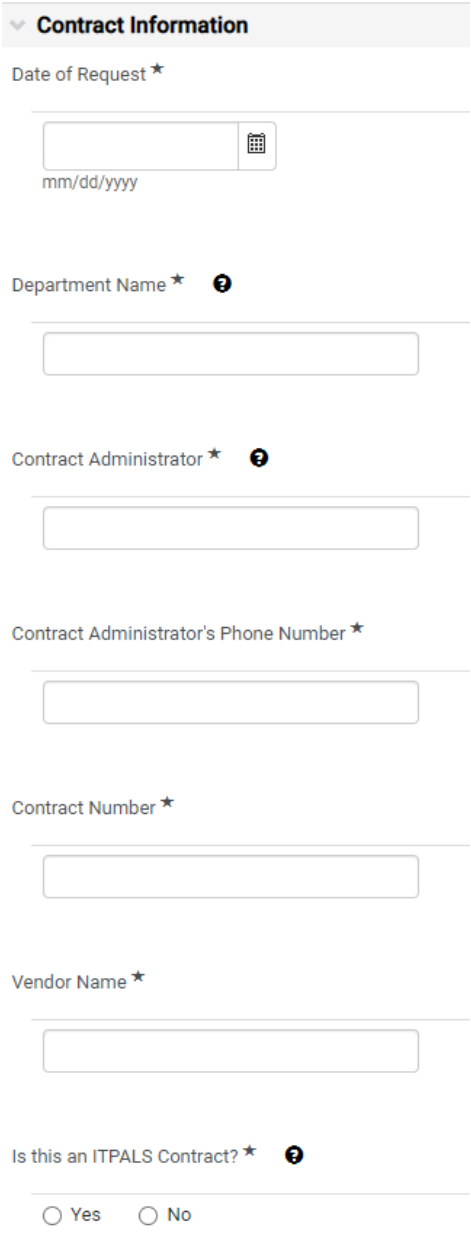
Attachments



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**.

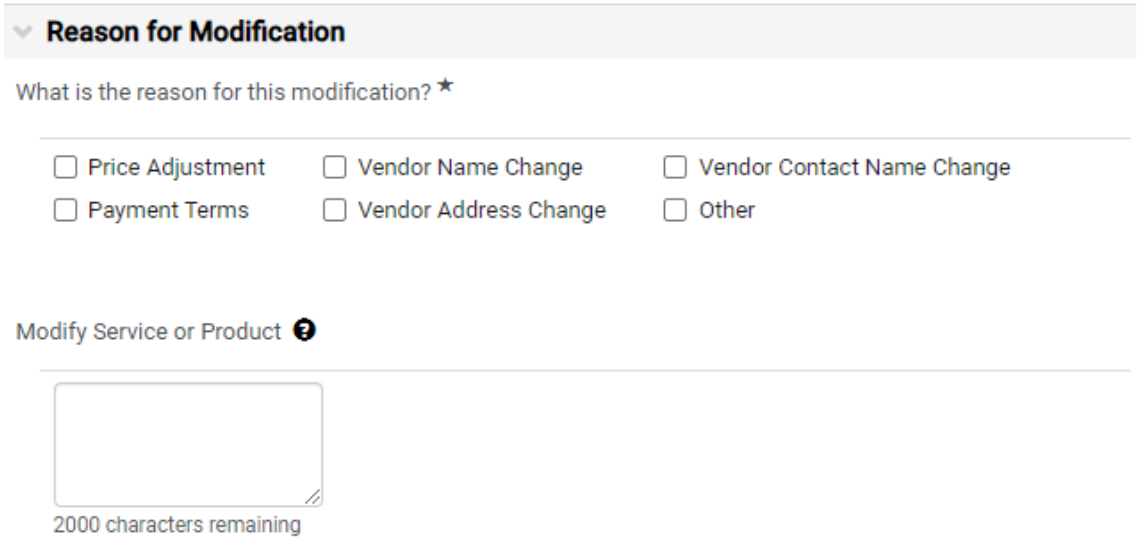


Enter the following Contract information:

- 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!

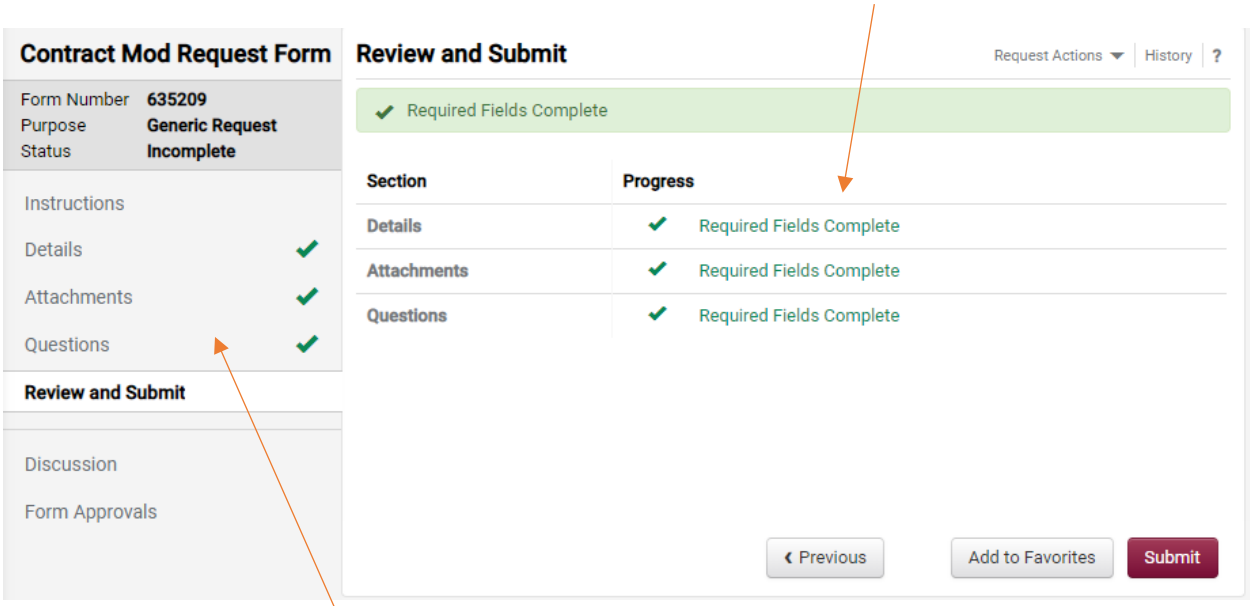
Each Contract Mod form request must have a **Reason for Modification**. Select the reason and provide a brief description for the modification to the service or product.



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

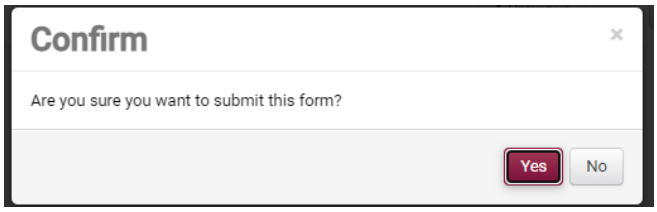
Review and Submit

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



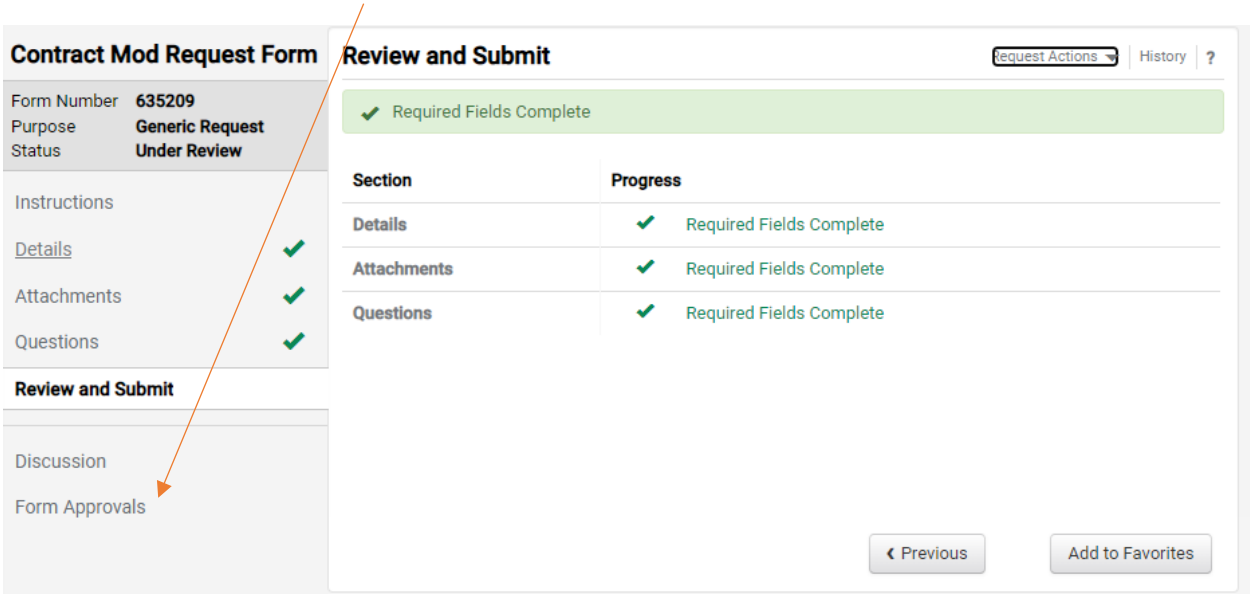
If any of the required fields were not completed, you can use the menu on the left-hand side to navigate back to the tab that needs to be fully completed before submission.

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.

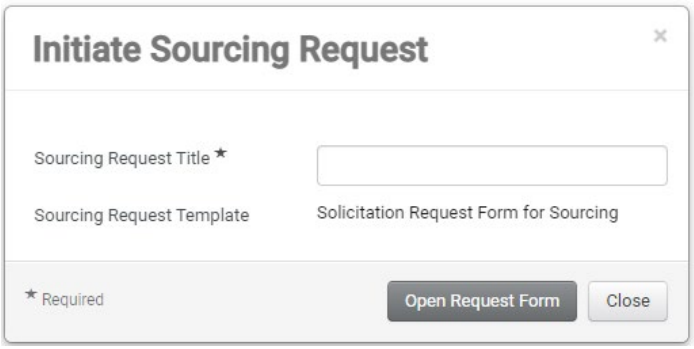


Once approved, you will receive an email from a Procurement Buyer confirming the changes have been added into HokieMart. The form will also show in approved Status.

Solicitation Request Form

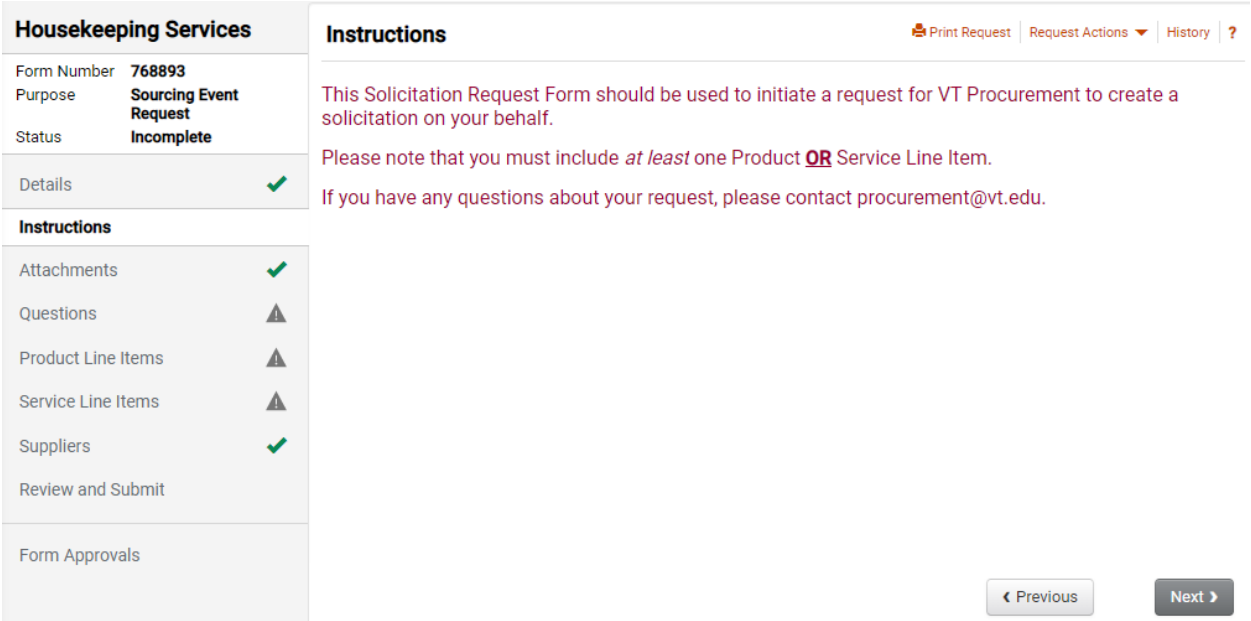
The Solicitation Request Form is used to notify Procurement of a request to create a solicitation for a good or service.

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**.

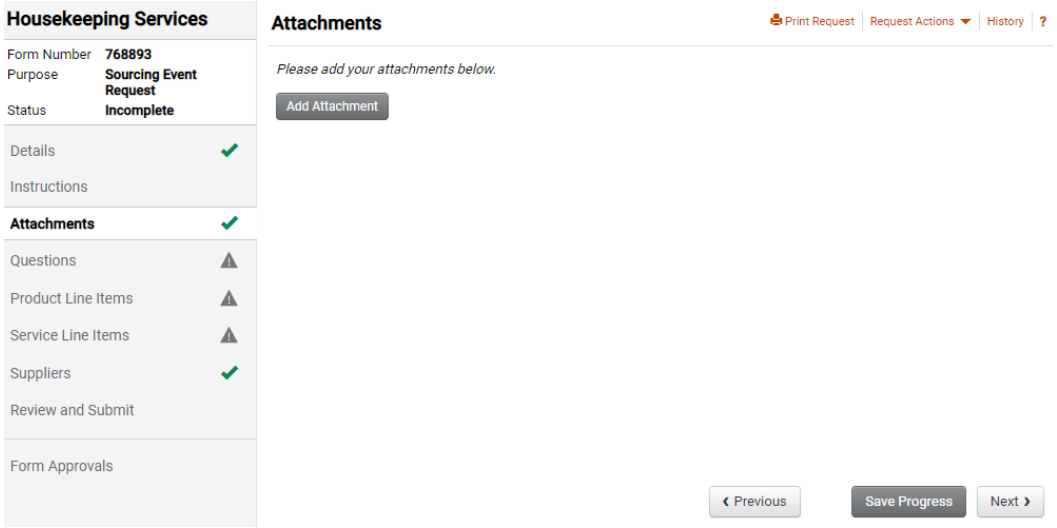


Instructions

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.



Attachments



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

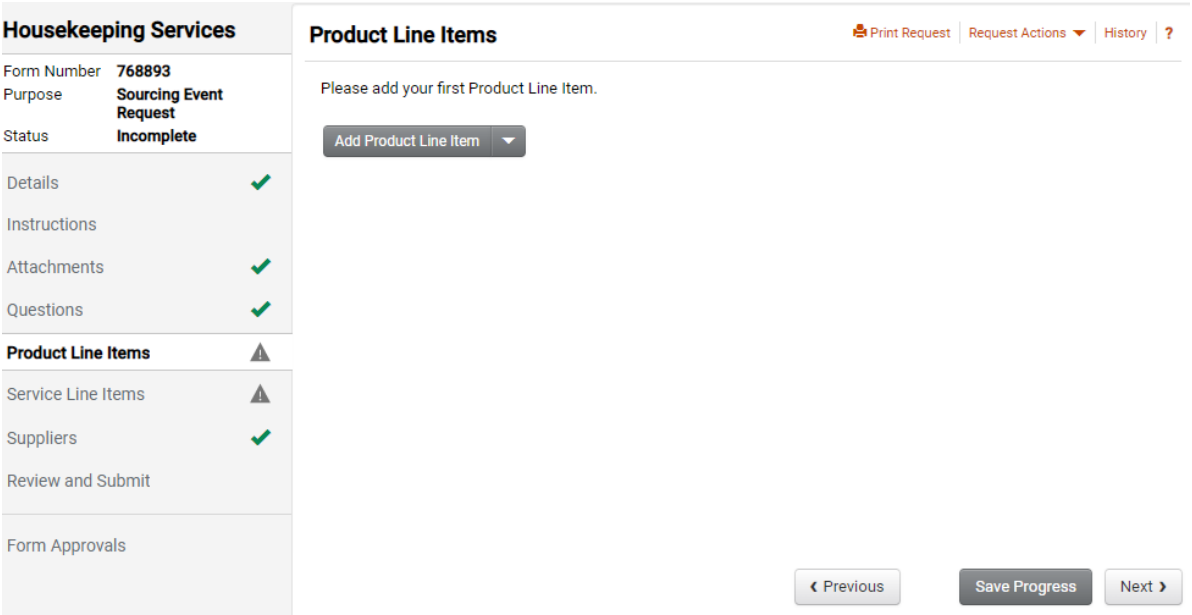
Enter any additional information that may be helpful for the buyer to review.

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

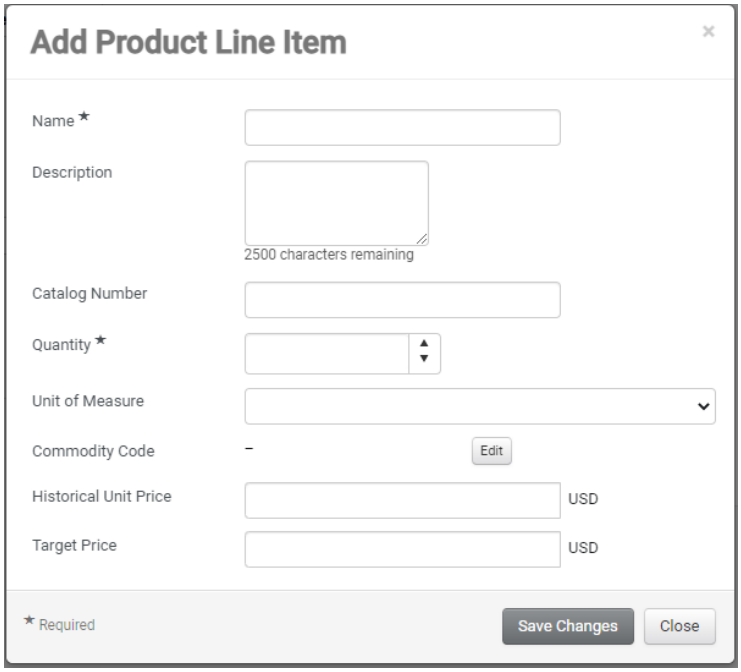
Double check that you have added any attachments back on the attachments tab. If no attachments were needed, answer Not Applicable to this question.

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.



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.



Suppliers

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

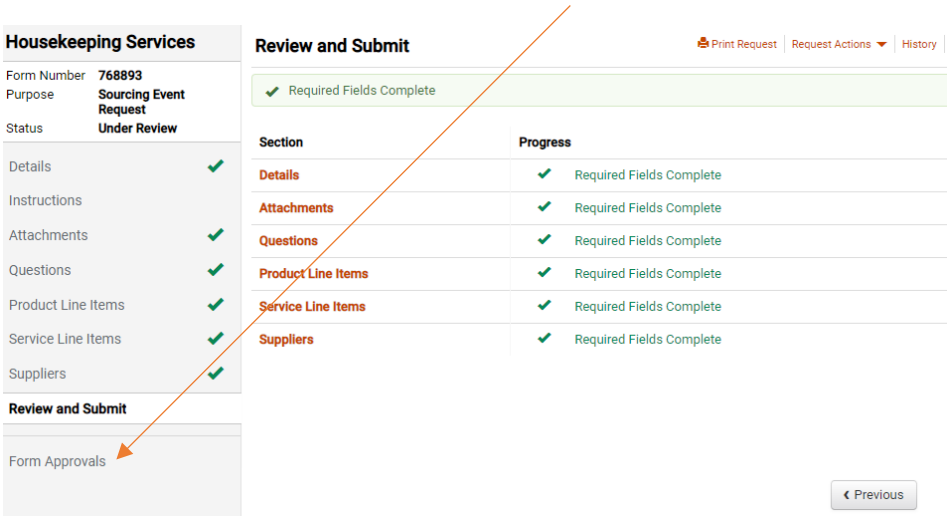
Review and Submit

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.



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

Additional Resources

Selecting Account Codes

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

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

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

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

Invoices/Credit Memos

Credit Memos in HokieMart

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

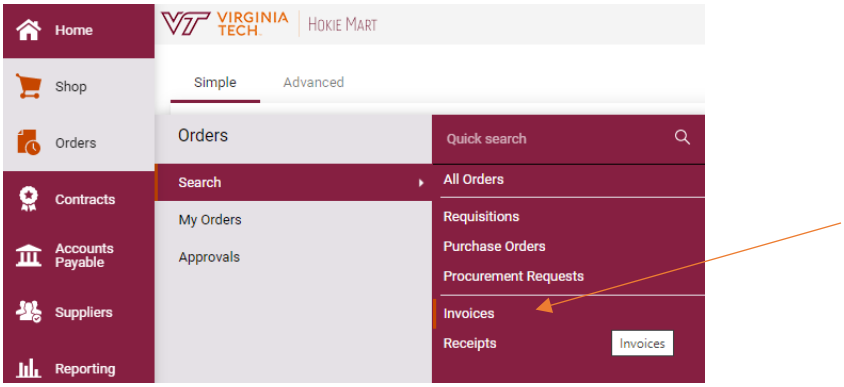
The Controller's office will process the credit memo and close out the invoice. To have the encumbrance released from a PO with a credit memo applied by AP, please contact **hokiemart@vt.edu**.

eInvoicing

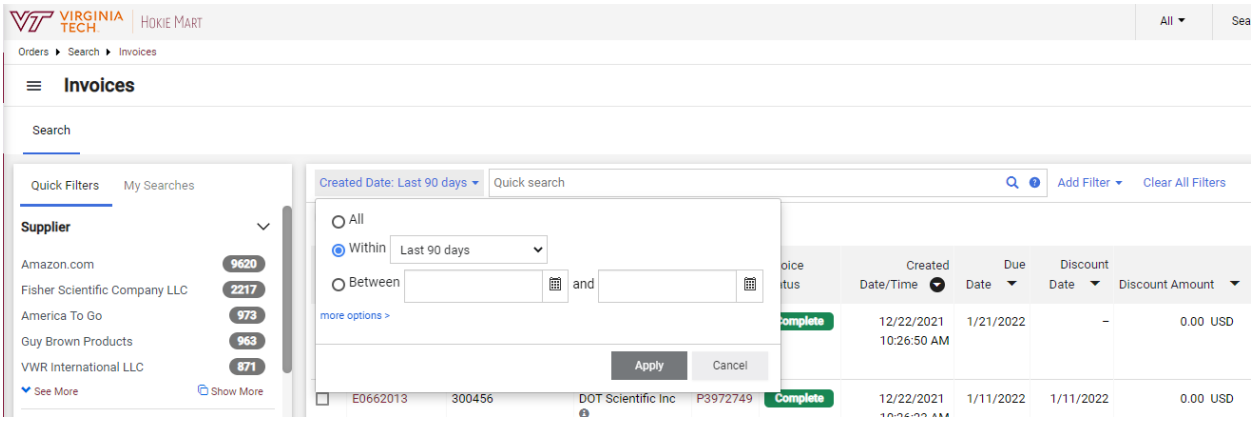
There are several suppliers who electronically invoice (eInvoice) the university. There are two options to view eInvoices.

<u>Option #1:</u>

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

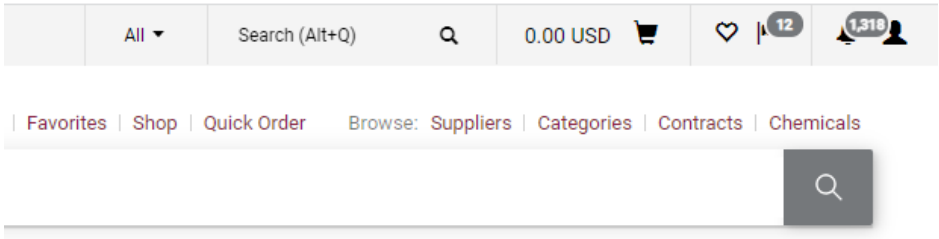


Users can then select filters such as date range, supplier, account, fund, etc.



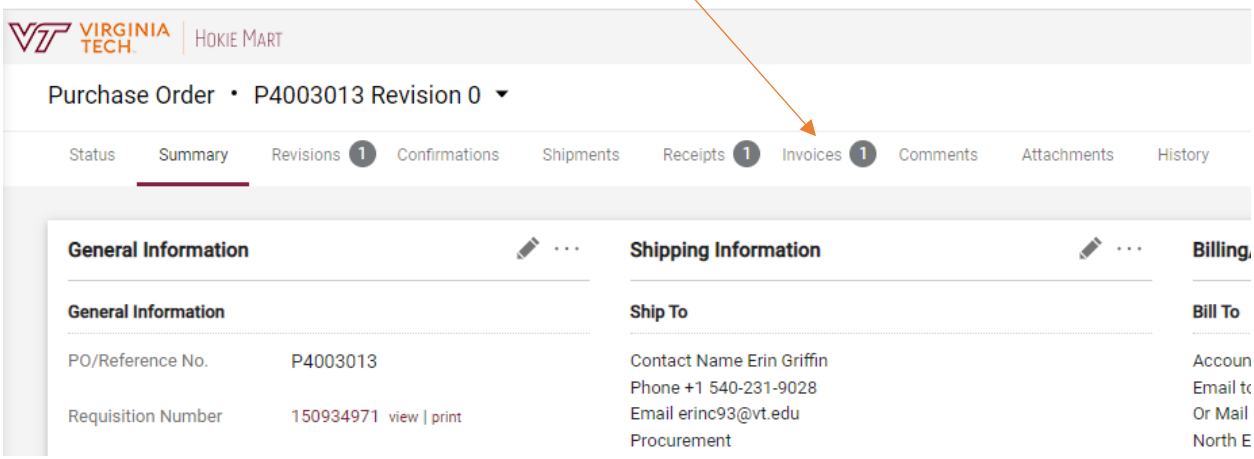
<u>Option #2:</u>

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.

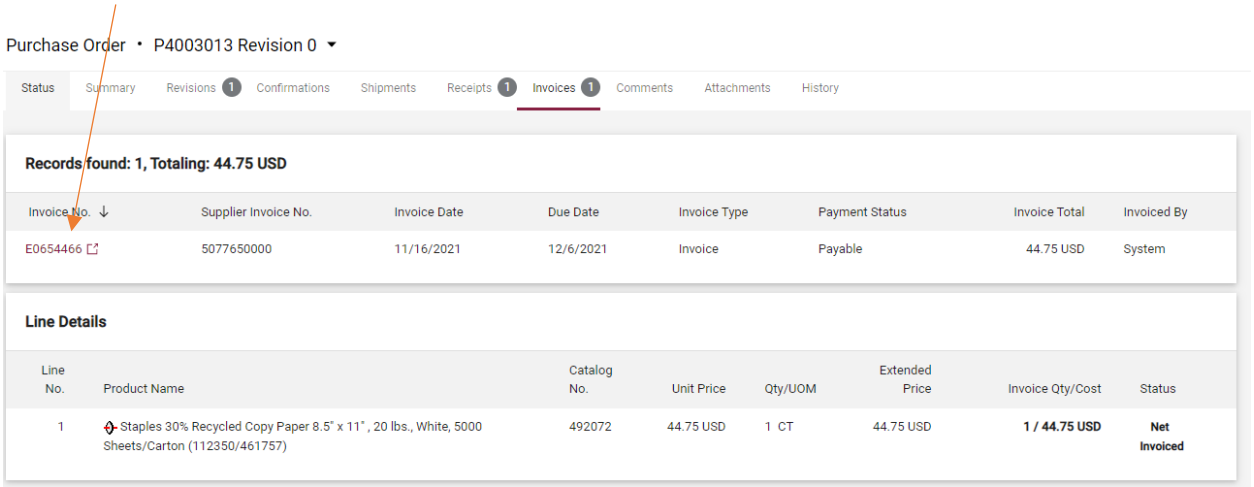


If the invoice number is entered in and searched, the user will be taken directly to that einvoice.

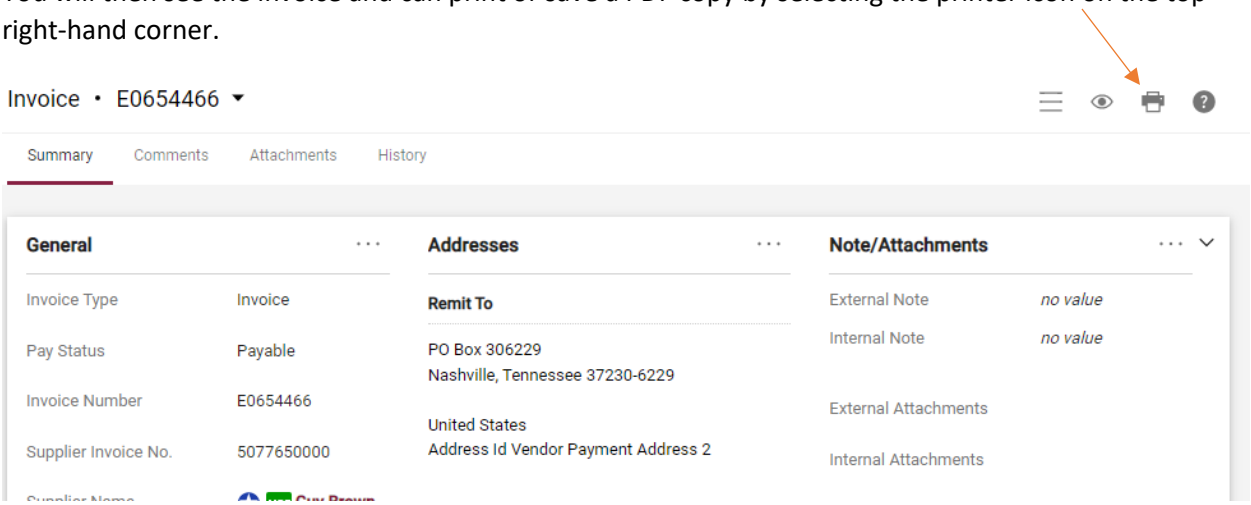
If the PO number is entered in and searched, the user will be taken directly to that PO. Click the **Invoices** tab on the purchase order.



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



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



Invoice 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 einvoices.

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: Rebecca Goad **rg91acct@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