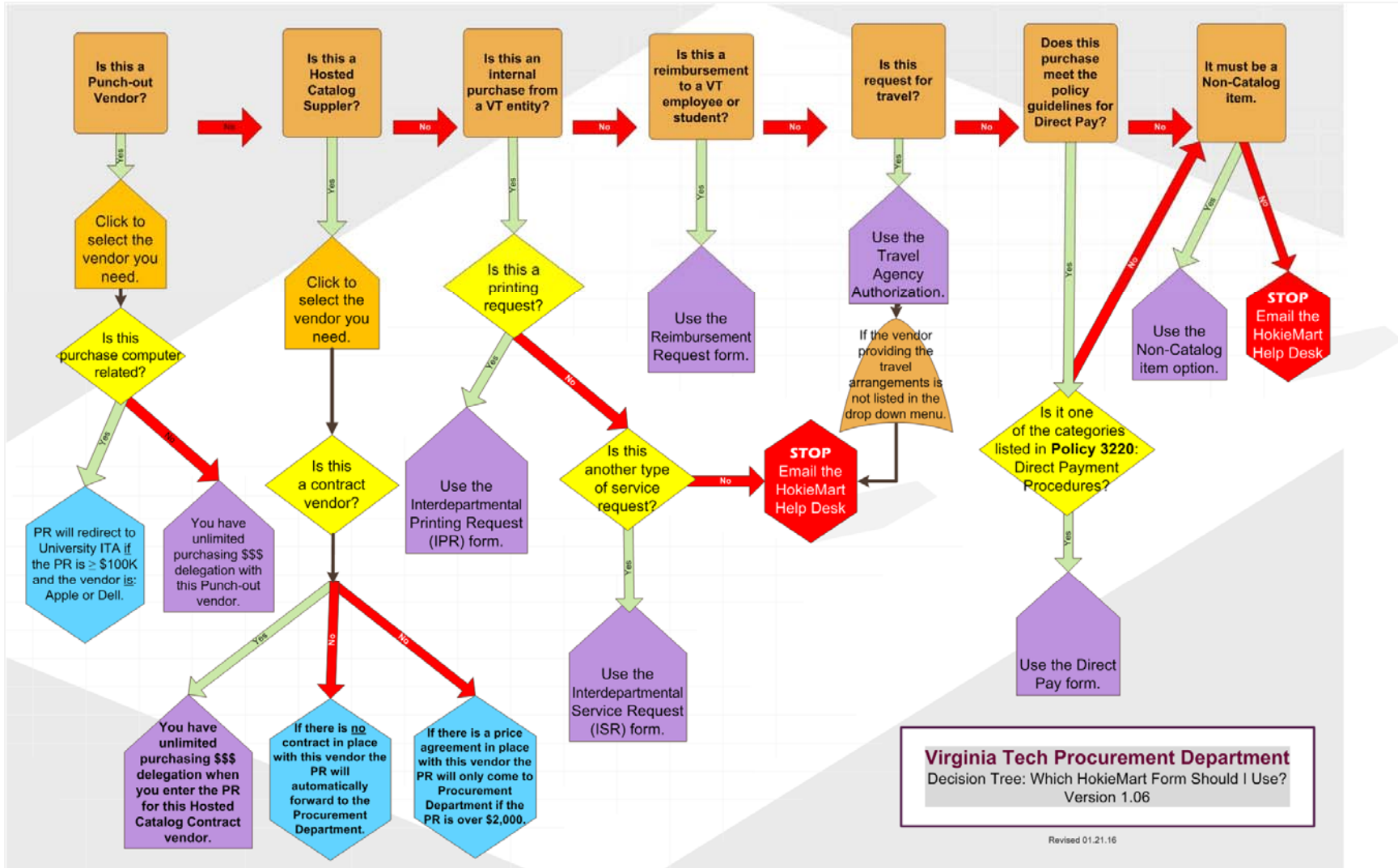




Virginia Tech's Electronic Procurement System: Forms Process Guide

2017-18






Understanding Forms Used for HokieMart Processes

There are nine (9) basic forms to handle purchasing **processes** in HokieMart. Two processes handled through Hosted Catalogs. The other processes are: Punchouts, Non-Catalog Suppliers, Reimbursement Requests, Direct Pay, Travel Agency Authorization (TAA), Interdepartmental Printing Request (IPR), and Interdepartmental Service Request (ISR).

Form/Process	Process Description	Limits	Additional Notes
Hosted Catalog			
Hosted Catalog – Contract Suppliers Primarily scientific suppliers with contracts and list price agreements.	The HokieMart system allows the user to perform searches in various ways (product name, SKU, vendor name, etc.) under the product search tab against the vendor catalog. The supplier’s catalog is loaded into the HokieMart system and updated quarterly for price and product changes. All contract suppliers are identified in HokieMart with the following symbol: ★. The symbol is located under “browse by supplier” (beside the vendor name).	Unlimited departmental purchasing authority	
Hosted Catalog – Non-Contract Suppliers Non-contract suppliers, primarily scientific suppliers with list and or discounted prices.	The HokieMart system allows the user to perform searches in various ways (product name, SKU, vendor name, etc.) under the product search tab against the vendor catalog. The supplier’s catalog is loaded into the HokieMart system and updated quarterly for price and product changes.	Departmental delegation of \$2,000 or less	When items from these catalogs exceed \$2,000, the Purchase Requisition will be created and sent to the Procurement Department for competitive procurement.

Form/Process	Process Description	Limits	Additional Notes
Punchouts			
<p>Punchouts - Contract Suppliers</p> <ul style="list-style-type: none"> ▶ Airgas ▶ Apple ▶ B&H ▶ Bioline ▶ Bio-Rad ▶ CDW-G ▶ Capital Tristate ▶ Complete Book & Media Supply ▶ Daly Computers ▶ Dell ▶ Digi-Key Electronics ▶ Dot Scientific ▶ Ferguson ▶ Fisher Scientific ▶ Genesee Scientific ▶ Grainger ▶ Guy Brown ▶ Integrated DNA Technologies (IDT) ▶ Lowes ▶ McMaster-Carr ▶ MSC Industrial Supply ▶ New Egg Business ▶ State Electric Supply Co. (SE) ▶ Qiagen ▶ Sigma-Aldrich ▶ Spectrum ▶ The Supply Room Companies (TSRC) ▶ Technology Integration Group (TIG) 	 <p>The HokieMart system allows the user to “punchout” from HokieMart directly to the supplier’s website, select products, and build a cart.</p> <p>Additional suppliers are added, as they become official punchouts.</p>	<p>Unlimited departmental purchasing authority EXCEPT for computer suppliers Apple and Dell (a cap of \$100,000 delegated authority).*</p>	<p>*revised/updated dollar limit.</p>

Form/Process	Process Description	Limits	Additional Notes
<ul style="list-style-type: none"> ▶ ThermoFisher Scientific ▶ Thomas Scientific ▶ Virginia Correctional Enterprises (VCE) ▶ USA Scientific ▶ VWR 	Continued from previous page.		

Non-Catalog

Non-Catalog			
Non-Catalog Item Form	Purchase(s) that cannot be handled through the Hosted Catalogs, Punchouts, Direct Pay, Reimbursement Request. (Example is New River Office Supply.)	Departmental delegation of \$2,000 or less	Purchase(s) or payment(s) to suppliers who are not Punchouts or Direct Pay. When the order exceeds \$2,000, it is sent electronically to the Procurement Department automatically for competitive procurement.

University Forms

University Forms			
Direct Pay Form	<p>Use to pay for items (goods and services) obtained under the direct payment procedures Policy 3220.</p> <p>*See Requestor Guide for the Direct Pay Policy and a listing of the categories or use the URL provided in next column.</p>	<p>See the Direct Pay delegated items at the following website:</p> <p>http://www.procurement.vt.edu/departments/policies.html</p>	<p>Select the appropriate payment category from the drop-down menu. Send original vendor invoice to the Controller's Office. Write the PO No in the upper, right-hand corner of the vendor invoice.</p> <p>**Direct Payments may be processed using the <u>prepayment procedure</u>. See instructions in the Requestor Guide.</p>
Reimbursement Request Form	<p>Use to reimburse Virginia Tech students/employees for non-travel items/services up to \$2,000.</p> <p>Entertainment and recruitment expenses in Blacksburg area or other official station may also be processed on this form.</p>	Departmental delegation of \$2,000 or less	The reimbursee must sign the statement on the HokieMart form (either print the HokieMart form or stamp the document with statement located in the Internal Info Instruction). Send the signed statement to the Controller's Office along with supporting original receipts and reference the PO number on the paperwork.

Form/Process	Process Description	Limits	Additional Notes
University Forms (continued)			
Interdepartmental Printing Request (IPR) Form	Order printing services from university printing facilities: Printing Services (South Main Street).	Unlimited departmental purchasing authority	Download and complete the IPR work request template which can be found in the External Info section and attach it to the HokieMart IPR as an External Attachment. Attach other documents, such as pdf's and electronic files, as needed.
Interdepartmental Service Request (ISR) Form	Use this form to order services from on-campus suppliers listed on the drop-down menu of the ISR form.	Unlimited departmental purchasing authority	Complete the ISR form. The form will may go to the department to enter pricing before being returned to the approver.
Travel Agency Authorization (TAA) Form	Purchase airline tickets and other travel-related services from contract travel agencies listed on the drop-down menu of the TAA.	Unlimited departmental purchasing authority	Provide additional instructions to travel agency under the "external info" section (such as rental car, personal travel, etc.). Enter the traveler's name in the catalog no. field. Include ticket information such as dates, to and from locations, etc. in the "product name/description" field or attach a copy the airline schedule as an external attachment.