HOKIEMART

Virginia Tech's
Electronic Procurement System:

Forms Process Guide

FY 2019-20

The HokieMart Decision Tree

Is this a Punch-out Vendor?
- Yes → Click to select the vendor you need.
  - **Is this purchase computer related?**
    - Yes → PR will redirect to **ITPALS** if the PR is ≥ $100K and the vendor is: Apple or Dell.
    - No → Unlimited purchasing $$$ delegation except with Amazon, where the limit is $2K.
- No →

Is this a Hosted Catalog Supplier?
- Yes → Click to select the vendor you need.
  - **Is this a contract vendor?**
    - Yes → There is unlimited purchasing $$$ delegation, when you enter the PR for this Hosted Catalog Contract Vendor.
    - No:
      - If a contract is NOT in place with the vendor, the PR will automatically route to the Procurement Department.
      - If a price agreement is in place with the vendor, the PR will only route to Procurement if it is over $10,000.
- No →

Is this an internal purchase from a VT entity?
- Yes → **Is this a printing request?**
  - Yes → Use the Interdepartmental Printing Request (IPR) form.
  - No → **Is this another type of service request?**
    - Yes → Use the Interdepartmental Service Request (ISR) form.
    - No → **STOP** Email the HokieMart Help Desk
- No →

Is this a reimbursement to a VT employee or student?
- Yes → Use the Reimbursement Request form.
- No →

Is this request for travel?
- Yes → Use the Travel Agency Authorization.
  - If the vendor providing travel arrangements is not listed in the drop down menu. → **STOP** Email the HokieMart Help Desk
- No →

Does this purchase meet the policy guidelines for Direct Pay?
- Yes → **Is it one of the categories listed in Policy 3220: Direct Payment Procedures?**
  - Yes → Use the **Direct Pay** form.
  - No → Use the Non-Catalog item option.
- No →

It must be a Non-Catalog item.
- Yes → Use the Non-Catalog item option.
- No → **STOP** Email the HokieMart Help Desk

Virginia Tech Procurement Department
Decision Tree: Which HokieMart Form Should I Use?
Version 1.09

Revised 05.03.19

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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 ▶ Beckman Coulter ▶ BioLegend ▶ Cell Signaling ▶ Janpak ▶ Neta ▶ New England Bio Labs ▶ Sanico	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	Primarily scientific suppliers with contracts and list price agreements.
Hosted Catalog – Non-Contract Suppliers ▶ Quality Biological	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 $10,000 or less	Non-contract suppliers, primarily scientific suppliers with list and or discounted prices. When items from these catalogs exceed $10,000, the Purchase Requisition will be created and sent to the Procurement Department for competitive procurement.

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Form/Process	Process Description	Limits	Additional Notes
Punchouts			
Punchouts - Contract Suppliers ▶ Amazon ▶ Airgas ▶ Apple ▶ B&H ▶ Bioline ▶ Bio-Rad ▶ CDW-G ▶ Capital Tristate ▶ Complete Book & Media Supply ▶ Daly Computers ▶ Dell ▶ Digi-Key Electronics ▶ Dot Scientific ▶ Fastenal ▶ Ferguson ▶ Fisher Scientific ▶ Genesee Scientific ▶ Grainger ▶ Guy Brown ▶ Integrated DNA Technologies (IDT) ▶ Lowes ▶ McMaster-Carr ▶ MSC Industrial Supply ▶ Medline ▶ NewEgg Business ▶ State Electric Supply Co. (SE) ▶ Qiagen ▶ Sigma-Aldrich ▶ Spectrum ▶ The Supply Room Companies (TSRC) ▶ Technology Integration Group (TIG)	HokieMart allows the user to "punchout" from HokieMart directly to the **supplier's website**, select products, and build a cart. Additional suppliers are added, as they become official punchouts. List continues on the next page.	Unlimited departmental purchasing authority EXCEPT for: ▶Computer suppliers Apple and Dell have a cap of $100,000 delegated authority ▶Amazon delegated authority is $2,000	*revised/updated dollar limit.

Form/Process	Process Description	Limits	Additional Notes
► ThermoFisher Scientific ► Thomas Scientific ► Virginia Correctional Enterprises (VCE) ► USA Scientific ► VWR	Continued from previous page.		

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 $10,000 or less	Purchase(s) or payment(s) to suppliers who are not Punchouts or Direct Pay. When the order exceeds $10,000, it is sent electronically to the Procurement Department for competitive procurement.

University Forms

Direct Pay Form	Use this form to pay for items (goods and services) obtained under the direct payment procedures **Policy 3220**: https://policies.vt.edu/3220.pdf. Familiarize yourself with Policy 3220.	See the Direct Pay delegated items at the following website:	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. Direct Payments may be processed using the prepayment procedure. See instructions in the Requestor Guide.
Reimbursement Request Form	Use to reimburse Virginia Tech students/employees for **non-travel** items/services up to $2,000. Entertainment and recruitment expenses in Blacksburg area or other official station may also be processed on this form.	Departmental delegation of $2,000 or less. Over $2,000 requires prior approval.	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. See sure to reference the PO number on all the paperwork.

Form/Process	Process Description	Limits	Additional Notes
University Forms (continued)			
Interdepartmental Printing Request (IPR) Form	Order all printing services from university printing facilities: Printing Services (South Main Street). Off campus locations should contact print services for additional guidelines: https://www.printing.vt.edu	Unlimited departmental purchasing authority. For orders over $2,000 contact Printing Services.	Complete the IPR work request template. Attach other documents, such as pdf's and electronic files, as needed. University policy states that all printing and copy work purchased with university/state funding should be directed to Printing Services
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 or view online: www.procurement.vt.edu/content/dam/procurement_vt_edu/hokiemart/Internal_Vendor_Listing.pdf	Unlimited departmental purchasing authority	Complete the ISR form. The form may route 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. For complete information related to travel visit the Controller's website: https://www.controller.vt.edu	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.