

HokieMart upgrade 10.3 will become effective on **November 8, 2010**. The following are the enhancements included in this upgrade.

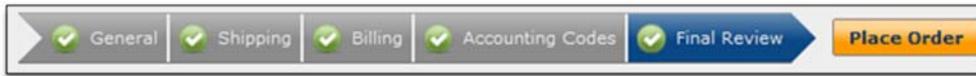
## ENHANCEMENTS TO THE CART

### Workflow

The current workflow navigation at the top of the shopping cart will no longer display.



Users will begin the checkout process by following the new navigation **Guided Checkout**. Users are not required to view each step in the checkout process unless corrections/additions are needed. They may proceed directly to Final Review. The navigation icons will turn green as the necessary sections are addressed.



### Errors

In the cart a list of errors is displayed allowing user to edit and correct fields.

**Almost ready to go! The list below needs to be addressed before the cart can be submitted.**

- Requisition can only contain one supplier. Remove or Move the items to another draft cart.

After correcting errors,

- (1) User may continue shopping by clicking “Continue Shopping.” **Continue Shopping**  
Using a non-catalog form, user will be returned to the home page. Choose the same form and supplier, and continue adding item(s) to the cart **OR**
- (2) User may “Return to Shopping Cart” which will allow additional items to be added to an active cart **OR**
- (3) Correct the listed errors and click “Proceed to Checkout.” **Proceed to Checkout**

A second list of consolidated errors may appear depending on how your profile is set up.

**EXAMPLE:** The “Funding tab” is active and the information below is displayed for correction.

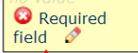
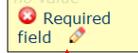
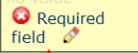


**⚠ Almost ready to go! The list below needs to be addressed before the request can be submitted.**

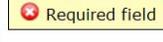
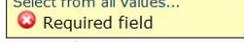
- Required field: Fund 
- Required field: OrgWF1 
- Required field: Account 
- \_: FundWF
- Required field: FundWF

**This is a partial list of errors. [Click here to see all \(7\)](#)**

Each “Required field” is an active link to correct the individual error. To see all errors click “Click here to see all.”

Funding					
These values apply to all lines unless specified by line item					
Chart	Fund	OrgWF1	Account	Location	Activity
U University Chart	<i>no value</i> 	<i>no value</i> 	<i>no value</i> 	<i>no value</i>	<i>no value</i>

By clicking on the “Required field,” the user will be able to make the needed correction(s).

Accounting Codes				
Chart	Fund	OrgWF1	Account	Location
U Select from profile values... Select from all values... Clear selected value...	<input type="text"/> Select from all values... 	<input type="text"/> Clear selected value... 	<input type="text"/> Select from all values... 	<input type="text"/> Select from all values... Select

recalc

After correcting the errors, click “Save.”

Once the user completes the necessary field(s) and clears the error list for the section, a dialog box will display to direct the user to the next section or Final Review.”

 **You have completed the required information in this step. At this point, you can do the following:**

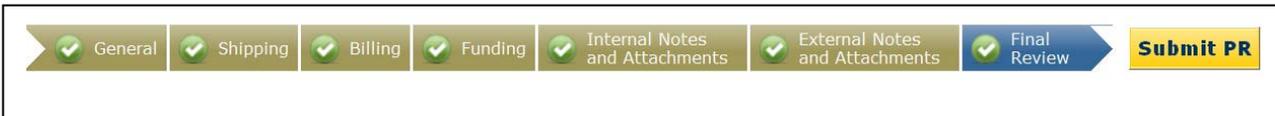
**Proceed to the next step: [Internal Notes and Attachments](#). Go straight to the end: [Final Review](#).**

As in the old cart, users will need to verify the delivery method in “Send to Supplier?” field. Click “edit” in the “Delivery Options” section of the cart and choose the desired delivery method. Click “Save.”

 **You need to be aware of the following issue(s), but it will not prevent you from submitting your request.**

- \_: Verify delivery method in "Send to Supplier?" field
- Warning:: Verify delivery method in "Send to Supplier?" field

Click on “Final Review” to review the cart and make any final corrections/additions.



Click “Submit PR.”

## Requisition Information

Purchase requisition will be presented for the user with the choice of clicking “Quick View” or the “Approvals Tab.”

**Requisition Information** ?

 **Congratulations! You have successfully submitted your request. If you need to view or print a copy, click [Quick View](#) or view its status on the [Approvals Tab](#).**

Here is a summary of the requisition. You can also retrieve this requisition at any time via the document history search page.

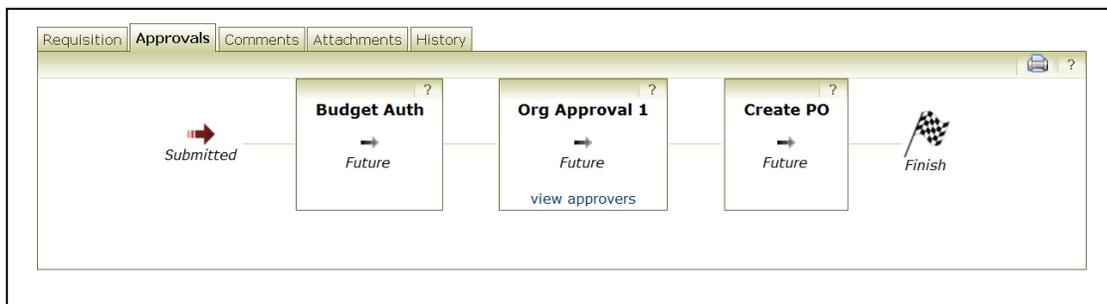
Requisition number	431793 <a href="#">view</a>
Requisition status	Pending
Cart name	2010-08-20 scrunkil 01
Requisition date	10/18/2010
Requisition total	10.00 USD
Number of line items	1

What would you like to do next? Here are links to some common actions.

- [Search for another item](#)
- [View order history](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)

The “Quick View” provides the entire PR.

The “Approvals Tab” provides the PR approval workflow and lists each step of the approval process.



## Show Monetary Calculations

A new link, “show monetary calculations,” is available in account split edit that displays a calculated monetary value for each % value entered by the user. The calculation is for information purposes only and can be useful in assigning a value for “% of Price” or “% of Quantity” splits.

Click “show monetary calculations” and the dollar amount will be displayed for each “% of Price” or “% of Quantity.”

Account	Location	Activity	% of Price	
12130 Select from all values...	Select from all values...	Select from all values...	50 <u>(25.00 USD)</u>	remove
12130 Select from all values...	Select from all values...	Select from all values...	50 <u>(25.00 USD)</u>	remove
Split Total			100% (50.00 USD)	add split

recalculate / validate values   show monetary calculations ←

## New Tabs

An “Attachments” tab and “Comments” tab will now track the number of attachments and comments added to the PR. The number will display in parenthesis after the tab heading.



## Font Size

The font size has been increased throughout the application. The default font size is medium. To change the font size:

- Click “Profile.”
- Click “Personal Settings.”
- Choose desired font size.
- Click “Save.”

The font selected will remain in effect until updated.

User Settings   Purchasing   Permissions   History

User Identification   **Personal Settings**   Roles   Department Permissions   Email P

Select a Language  
Country  
Time Zone  
Color Theme  
Font Size: **Medium**  
Help on mouse over

Save

## OTHER ENHANCEMENTS

### Quick Document Preview

When viewing search results for PRs and POs, the user will be able to see a quick “preview” of the document. A small icon will appear next to each document. Click on this icon to view an overlay that displays information about that document.

Status ▲	Requisition No. ▲	Supplier(s)	Requisition Name ▲	Requisitioner ▲	Requisition Date/Time ▼	Requisition Total
	<b>420248</b>	DOT Scientific Inc	2010-07-21 sutphin 01	Sutphin, Bonnie	10/21/2010 4:11 PM	6,689.40 USD
	<b>459352</b>	Wendell L Vest	2010-10-21 scrunkil 01	Department, Shared	10/21/2010 3:25 PM	0.00 USD
	<b>459286</b>	Enterprise Rent-A-Car	2010-10-21 scrunkil 01	Crunkilton, Sherry	10/21/2010 1:44 PM	100.00 USD

The preview contains document-specific information that will help the user identify the required PR or PO without leaving the search results screen.

The PR “Quick View” will display.

Requisition Quick View - 420248 Print Close

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**Requisition Summary - 420248**

General	Shipping	Billing
<b>Status</b> Pending <small>Org Approval 1</small> <b>Submitted</b> 10/21/2010 4:11 PM <b>Cart Name</b> 2010-07-21 sutphin 01 <b>Priority</b> Normal <small>Leave date blank unless next fiscal year order (then enter 07/01/2009)</small> <b>Prepared by</b> Bonnie Sutphin <b>Work Order Number</b> N/A	<b>Ship To</b> Contact Name Bonnie Sutphin Phone +1 (540) 231-4637 Email sutphinb@vt.edu Purchasing 270 Southgate Center Blacksburg, VA 24061 United States  <b>Delivery Options</b> Ship Via Best Carrier-Best Way Send to Supplier? SciQuest Will Deliver <small>SciQuest will distribute the PO to supplier</small>  Notify AP-Prepayment <b>X</b>	<b>Bill To</b> Accounts Payable 201 Southgate Center Mail Code 0312 Blacksburg, VA 24061 United States

Funding					
Chart	Fund	OrgWF1	Account	Location	Activity

Internal Notes and Attachments	External Notes and Attachments
Internal Note <i>no note</i>	Note to all Suppliers <i>no note</i>
Internal attachments	Attachments for all suppliers

**Supplier / Line Item Details**

<b>DOT Scientific Inc</b>		Contract <i>no value</i>	
Order Address 1 4165 Lippincott, Burton, MI 48519 US		PO Number To Be Assigned	

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
<b>1</b> Corning® Chemical Resistant Sealing Mat for 384 Well Deep Well Polypropylene Storage Block, Nonsterile	3341	384Well 50/CS	445.96 USD	15 CS	6,689.40 USD
Manufacturer CORNING INCORPORATED Name Manufacturer 3341 Part Number More Information <a href="http://catalog2.corning.com/Lfesci...">http://catalog2.corning.com/Lfesci...</a> URL UNSPSC 41-12-21-02		Internal Note <i>no note</i> Internal attachments External Note <i>no note</i> Attachments for supplier			
Supplier subtotal					6,689.40 USD

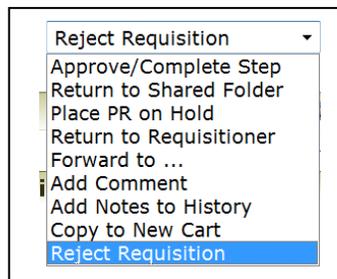
## Supplier Display in Requisition Search

Supplier names are now visible when using the “my requisitions” tab and the “PR History” tab.

Status	Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
✓	18800078	Electronic Systems Inc	2010-10-21 scrunkil 01	Crunkilton, Sherry	10/21/2010 10:17 AM	282.00
✓	18688592	Guy Brown Products	2010-10-14 scrunkil 02	Crunkilton, Sherry	10/14/2010 3:12 PM	524.11
✓	18640150	Matthew Bender & Company Inc	2010-10-12 scrunkil 01	Crunkilton, Sherry	10/12/2010 3:12 PM	41.47
✓	18571735	VT Software Distribution	2010-10-07 scrunkil 01	Crunkilton, Sherry	10/8/2010 1:07 PM	50.00

## APPROVERS

Approvers now have the ability to reject all line items of a PR in one single action. “Reject Requisition” is now an option on the “Available Actions” drop-down menu.



Selecting “Reject Requisition” will open a pop-up box asking the user to add a comment to the requisition if desired. The note will be added to the PR history.

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

Reject Requisition ?

**WARNING: You are about to reject ALL lines on this requisition. Once a PR is rejected, it cannot be reinstated. Click OK to Reject, or Cancel to leave the PR unchanged.**

PR Reject Reason

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

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

[Reject Requisition](#) [Cancel](#)

## SAMPLE - Processing a HokieMart Cart

- Choose the desired form from the HokieMart Home Page.
- Select the desired supplier.
- Complete the required information to add items to the cart.

User will now be in the “Cart-Draft Requisition” (non-catalog form will return user to home page). Follow instructions noted on bottom of page 1.

The screenshot displays the HokieMart 'Cart - Draft Requisition' interface. At the top, the user is identified as Sherry Crunkilton, with options for profile and logout. The cart summary shows 1 item(s) with a subtotal of 26,500.00 USD. A search bar is present with 'PR No.' as the search criteria. Navigation tabs include home/shop, favorites, carts, approvals, history, settlement, profile, and more >>. The 'active cart' section shows draft carts, favorites, and my requisitions. The main cart area features a shopping cart icon, the text 'Shopping Cart for Sherry Crunkilton', and a 'Continue Shopping' button. Below this, there's a field to name the cart (2010-10-22 scrunkil 01) and a 'Proceed to Checkout' button. A section for 'Vest Paving & Sealing SBE' provides an 'Add Non-Catalog Item' button and the order address: Po Box 802, Christiansburg, VA 24068 US. The cart table lists the item 'W. Stadium Lot' with a unit price of 26,500.00 USD EA, a quantity of 1, and a total of 26,500.00 USD. Action buttons for 'Add to Favorites', 'Remove', and 'More Actions' are available for the item. At the bottom, there's another 'Proceed to Checkout' button and an 'Update' button for changes.

Product Description	Unit Price	Quantity	Total
Item added on Oct 22, 2010 <a href="#">W. Stadium Lot</a>	26,500.00 USD EA	1	26,500.00 USD

If all information in the “Shopping Cart” is correct,

- Click “Continue Shopping” **OR** “Return to Shopping Cart” **OR** “Proceed to Checkout” (see bottom of page 1).

User will now be in Summary – Draft Requisition and will view a new **Guided Checkout** which displays all of the steps to complete the cart.



A screenshot of the HOKIE MART website's 'Summary - Draft Requisition' page. The page header includes the HOKIE MART logo, a user profile for 'Sherry Crunkilton', and a shopping cart icon showing '2010-10-22 scrunkil 01 | 1 item(s), 26,500.00 USD'. Below the header is a navigation menu with options like 'home/shop', 'favorites', 'carts', 'approvals', 'history', 'settlement', 'profile', and 'more &gt;&gt;'. A secondary navigation bar shows 'active cart', 'draft carts', 'favorites', and 'my requisitions'. The main content area features a progress bar with seven steps: General, Shipping, Billing, Funding, Internal Notes and Attachments, External Notes and Attachments, and Final Review. A yellow warning box contains the text: 'You need to be aware of the following issue(s), but it will not prevent you from submitting your request.' followed by two bullet points: 'Warning: Verify delivery method in "Send to Supplier?" field' and 'Warning: Verify delivery method in "Send to Supplier?" field'. A 'Submit PR' button is located to the right of the progress bar.

If there is an error in the “Cart Draft Requisition,” a list of errors (if any) in the cart will be displayed in the **Guided Checkout**. Correct the errors in the area highlighted in blue.

A screenshot of the 'Guided Checkout' progress bar. The steps are: General, Shipping, Billing, Funding, Internal Notes and Attachments, External Notes and Attachments, and Final Review. The 'Funding' step is highlighted in blue, and a red arrow points down to it. Below the progress bar is a yellow box with a green checkmark icon and the text: 'You have completed the required information in this step. At this point, you can do the following: Proceed to the next step: Internal Notes and Attachments. Go straight to the end: Final Review.'

If you wish to add “Internal Notes and Attachments” or “External Notes and Attachments,” click on the active link provided. When all information is complete,

- Click “Final Review.” If necessary, corrections may be made in Final Review.

User will be asked to verify the delivery option.

A screenshot of the 'Guided Checkout' progress bar. The steps are: General, Shipping, Billing, Funding, Internal Notes and Attachments, External Notes and Attachments, and Final Review. The 'Final Review' step is highlighted with a blue arrow pointing to the right. Below the progress bar is a yellow warning box with a yellow triangle icon and the text: 'You need to be aware of the following issue(s), but it will not prevent you from submitting your request.' followed by two bullet points: 'Warning: Verify delivery method in "Send to Supplier?" field' and 'Warning: Verify delivery method in "Send to Supplier?" field'.

After verifying the delivery method and all other information on the PR,

- Click “Submit PR.”

**Submit PR**

You will receive notification that the PR has been created:

Requisition Information ?

 **Congratulations! You have successfully submitted your request. If you need to view or print a copy, click [Quick View](#) or view its status on the [Approvals Tab](#).**

Here is a summary of the requisition. You can also retrieve this requisition at any time via the document history search page.

Requisition number	431793 <a href="#">view</a>
Requisition status	Pending
Cart name	2010-08-20 scrunkil 01
Requisition date	10/20/2010
Requisition total	9.99 USD
Number of line items	1

What would you like to do next? Here are links to some common actions.

- [Search for another item](#)
- [View order history](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)