



HokieMart Bulletin Upgrade 11.3

November 3, 2011

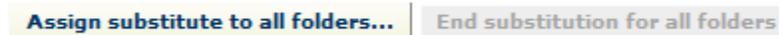
HokieMart upgrade 11.3 will be effective November 7, 2011. The following are the enhancements included in this upgrade.

Approvers:

Assign Substitute for all Approver Folders

Approvers often assign a substitute Approver when they are on leave from the university (vacation, etc.). A new feature will now allow an Approver the ability to assign a substitute and to end a substitution for all folders at one time rather than having to take action on each one individually.

In the upper left portion of the screen, Approvers have the ability to select, “Assign substitute to all folders”



This is a useful feature if, as an Approver, you have the responsibility to approve for several organizations.

By selecting this option, a search feature will be displayed. This allows the Approver, as in previous versions, to choose a substitute. Approvers need to search only by last name and then choose “Select.”

Upon return to work, the substitution may be ended. This is done by selecting “End substitution for all folders.”



It should be noted, as in earlier versions of HokieMart, Approvers still may assign substitutes on an individual organization level.

Sorting of Approval Screen

This feature benefits Approvers by providing the ability to sort on individual columns. Although the sort feature has been available in earlier versions of HokieMart, now if the Approver has sorted by a particular column and leaves the screen and returns, the column will remain sorted.

For each column, except “Action,” there is an arrow that will allow the various columns to be sorted in ascending or descending order.



Quick View – Receipt and Invoice:

Receipt Quick View

Access to receipt information is an integral part of determining if an invoice can be paid as well as other information. The receipt quick view provides the user with the ability to view the pertinent information about a receipt without having to navigate away from the current view. This allows the user to view more quickly and to access important information without unnecessary navigation.

To view receipt information, select from the tab line, “settlement.”



Users are able to search receipt information by selecting “receipt history.”



After selecting, conduct a search by defining conditions. Check the filter box located in the upper portion of the screen to activate the lower section.

Identify:

- Date range (start and end)
- User (if necessary)
- Receipt Department
- Receipt Attributes (quantity or cost)

A screenshot of a search filter interface. At the top, there are three input fields: 'Start Date' with the value '11/01/2011', 'End Date' with the value '11/04/2011', and 'User' with a 'Select User' button. Below these are two main filter sections. The first section, 'Receipt Departments', has a list of departments on the left and a 'Only Include Receipts From These Departments' list on the right containing 'Purchasing'. The second section, 'Receipt Attribute Filters', has a list of attributes on the left and an 'Include Receipts With Any of These Attributes' list on the right containing 'Qty Receipt'. A red arrow points from 'Fully Matched' in the left list to 'Qty Receipt' in the right list. Navigation arrows are present between the sections.

Select "Search," located at the bottom of the screen.

A listing of results will display. Choose the receipt to be viewed and select the icon next to the Receipt No.

Receipt History Search Results						
Receipt No	Supplier Name	PO No	Receipt Type	Receipt Date	Receipt status	
46286	Thomas Scientific Inc	P2171207	Quantity	11/3/2011	No Matches	
46293	Thomas Scientific Inc	P2171207	Quantity	11/3/2011	No Matches	

Displayed will be all information for that specific receipt.

Receipt Quick View ? X

Header Information

Receipt Name	2011-11-03 sutphinb 01	Receipt Create Date	11/3/2011 9:50:37 AM	
Receipt No	46286	Receipt Date	11/3/2011 12:00:00 AM	Received by
		Packing Slip No.		Bonnie Sutphin
		Supplier Name	Thomas Scientific Inc	

RECEIPT ADDRESS	DELIVERY
Location	Carrier
Contact Name Bonnie Sutphin	Other
Phone +1 (540) 231-4637	Tracking No.
Email sutphinb@vt.edu	Flexible Text Field 2
Purchasing	Attachments
270 Southgate Center	Notes
Blacksburg, VA 24061	(1,000 Chars. Max)
United States	

Line Details

Line Details

For Selected Lines: Remove Selected Items

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
P2171207	1	THOMAS Digital Compound	1235C15	1 EA	46293	1		Received	

Invoice Quick View

A similar feature is available allowing users to view invoices.

To view invoice information, select from the tab line, “settlement.”



Select “invoice history.”

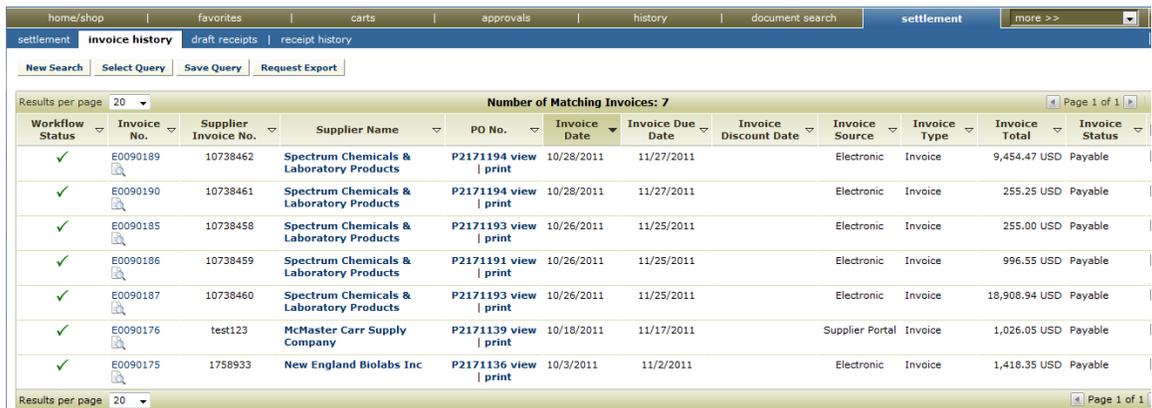


To view invoices, conduct a search by defining conditions. Check the filter box located in the upper portion of the screen to activate the lower section.

Identify:

- Date range (start and end)
- Select custom search by account or fund
- Invoice attributes (if choosing more than one, hold down the control key and make additional selections)
- Invoice status.

Once completed, select search and results will be returned. To view the invoice, select the icon located with the Invoice No.



Workflow Status	Invoice No.	Supplier Invoice No.	Supplier Name	PO No.	Invoice Date	Invoice Due Date	Invoice Discount Date	Invoice Source	Invoice Type	Invoice Total	Invoice Status
✓	E0090189	10738462	Spectrum Chemicals & Laboratory Products	P2171194 view print	10/28/2011	11/27/2011		Electronic	Invoice	9,454.47 USD	Payable
✓	E0090190	10738461	Spectrum Chemicals & Laboratory Products	P2171194 view print	10/28/2011	11/27/2011		Electronic	Invoice	255.25 USD	Payable
✓	E0090185	10738458	Spectrum Chemicals & Laboratory Products	P2171193 view print	10/26/2011	11/25/2011		Electronic	Invoice	255.00 USD	Payable
✓	E0090186	10738459	Spectrum Chemicals & Laboratory Products	P2171191 view print	10/26/2011	11/25/2011		Electronic	Invoice	996.55 USD	Payable
✓	E0090187	10738460	Spectrum Chemicals & Laboratory Products	P2171193 view print	10/26/2011	11/25/2011		Electronic	Invoice	18,908.94 USD	Payable
✓	E0090176	test123	McMaster Carr Supply Company	P2171139 view print	10/18/2011	11/17/2011		Supplier Portal	Invoice	1,026.05 USD	Payable
✓	E0090175	1758933	New England Biolabs Inc	P2171136 view print	10/3/2011	11/2/2011		Electronic	Invoice	1,418.35 USD	Payable

Displayed will be all information for that specific invoice.

Buyer Invoice Quick View [Print] [Close]

Invoice Summary - Supplier Invoice No. 10738460 (Doc. No. [E0090187](#))

Supplier Invoice No. 10738460
 Supplier Name Spectrum Chemicals & Laboratory Products

General		Addresses	Note/Attachments
Invoice Type	Invoice	Remit To	External Note <i>no note</i>
Pay Status	Payable	Remit To Location Vendor Payment Address	Internal Note <i>no note</i>
Invoice Number	E0090187	List 1	External Attachments
Supplier Invoice No.	10738460	File No 11990	Internal Attachments
Supplier Name	Spectrum Chemicals & Laboratory Products	Los Angeles, CA 90074-1990 United States Address Id Vendor Payment Address 1	
Invoice Date	10/26/2011	Bill To	
Discount Date		Accounts Payable	
Due Date	11/25/2011	201 Southgate Center	
Terms	0, Net 30	Mail Code 0312	
Terms Discount	0.00 USD	Blacksburg, VA 24061	
Invoice Name		United States	
<u>Match Status</u>	Do Not Match	Payment Information	Discount, Tax, Shipping & Handling
<u>Invoice Source</u>	Electronic	Accounting Date 10/26/2011	Discount, tax, shipping & handling
<u>Contains substituted item(s)</u>	✘	F.O.B. N/A	Allocation Weighted Method
		Payment Method Unknown	

If you have any questions about these new features available in the upgrade or other aspects of HokieMart, please contact the HokieMart Help Line at 231-2020 or the Help Desk at hokiemark@vt.edu.