HokieMart Approver Guide
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Introduction

HokieMart is an e-procurement system which allows Virginia Tech to provide an effective and efficient purchasing system for the university. HokieMart, allows Virginia Tech:

- To secure better pricing of commonly-used products
- To provide one-stop shopping
- To reduce time and effort in the purchasing process
- To select goods from online suppliers
- To produce cost savings through the use of HokieMart contract suppliers
- To improve business practices with the introduction of initial purchase approval
- To increase efficiency with the use of central invoicing and electronic receiving
- To produce, in conjunction with Banner, accurate and more timely financial information
- To increase the flow of purchase orders to eVA
Roles in HokieMart

**Requestor** – an individual who initiates the *electronic* purchase of goods and services by shopping and creating a “cart.” The **Requestor** has numerous sources 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 individual who initiates the *electronic* purchase of goods and services “on behalf of” the **Requestor** who is authorized to use HokieMart.

**Approver** – individual designated to *electronically* review/edit and approve purchase requisitions within the delegated purchasing authority. After verification, the Approver may either reject part/all of the PR or approve the PR. Approval of the PR creates a Purchase Order (PO) that is electronically delivered to the supplier.

**Receiver** – an individual who *electronically* receives goods and services. The **Receiver** verifies receipt of goods/services. All or part of the order may be received depending on delivery (backorders, damaged goods, etc.). After HokieMart interfaces with Banner, a Banner PO number is created by the system. Typically, a single user may also serve as both a **Requestor** and **Receiver**. HokieMart provides a central receipt of invoice process for the entire university. All invoices created in HokieMart are sent directly to the Controller’s Office. Departments continue to receive invoices for direct payments and university contract transactions.

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**, and **Receiver**.

Additional HokieMart material may be found on the Purchasing website: [https://www.procurement.vt.edu/hokiemart.html](https://www.procurement.vt.edu/hokiemart.html)
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:

<table>
<thead>
<tr>
<th>Platform</th>
<th>Browser Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows</td>
<td>Internet Explorer (IE) – Only Version 11*</td>
</tr>
<tr>
<td></td>
<td>Edge – latest version with Windows 10</td>
</tr>
<tr>
<td></td>
<td>Chrome – latest version – automatically updated by Google</td>
</tr>
<tr>
<td></td>
<td>Firefox – latest version – automatically updated by Mozilla</td>
</tr>
<tr>
<td>Macintosh</td>
<td>Safari 4.0 and higher</td>
</tr>
<tr>
<td></td>
<td>Firefox – latest version – automatically updated by Mozilla</td>
</tr>
<tr>
<td>iPad</td>
<td>Safari – embedded browser within the iPad</td>
</tr>
</tbody>
</table>

*Previous versions of Internet Explorer are no longer supported. Users will be redirected to a page displaying recommended browsers.

Please note: iPad is supported by Jaggaer, however, not all Supplier punch-out sites will support the use of this device. Additionally, although Safari is supported by Jaggaer, not all Supplier punch-out sites will support this browser.
Navigation

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

The **Quick Search** bar is for locating documents by number

Use drop down arrow to narrow search

The **Heart** icon is used to access **My Bookmarks**, useful for frequently used forms

The **Bell** icon will include the number of **Notifications** you have

The **Flag** icon will include the number of **Action Items** you have to complete

The **silhouette** contains basic user information. Here you can **view your profile**

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

The **Organization Message** displays announcements from Procurement
Searching for a Requisition or PO

Approvers will have the ability to search for requisitions or POs using their unique numbers.

From the Home Page of HokieMart:

Enter the requisition number that you would like to view

Select the Symbol

The entire requisition will be visible

Follow the same steps as above to view a PO. Change the drop-down options to Purchase Order then type in the desired PO number and search.
User Profile/ Notification Preferences

Each HokieMart Approver will have a “personalized” profile which must be created prior to performing HokieMart functions.

Email Preferences

When a Purchase Requisition (PR) is generated in HokieMart, emails can be automatically generated to notify Approvers. By default, certain email notification boxes will be checked. Approvers may choose to check additional email notification boxes to increase the level of individual notification. By placing the cursor over the description, a brief definition will be displayed to assist users in making a decision.

- Select the silhouette icon
- Then 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 the edit section.

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

- **None (Default)** – no notifications are delivered by the system
- **Email** – the system will send an email to your VT 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).

We recommend, at minimum, turning on the **PR pending Workflow Approval** email notification.
Purchase Requisition Actions

As an Approver, you have the responsibility to review/verify the data on the PR. The Approver or Substitute is responsible for ensuring that purchases are appropriate university expenditures.

As part of the review process, several actions may be taken:

Assigning the PR

From the home page of HokieMart select the flag icon for action items.

A list of requisitions awaiting action will appear at the bottom.

Click on the requisition number.

Select “Assign to myself” on the requisition you wish to approve/reject.
The entire requisition summary will appear for your review.
Reviewing/Editing the PR

Throughout the requisition, to edit, select the pencil icon.

At this point the Approver must review and, if applicable, edit the PR. The PR cannot proceed through the approval process until the “Review” is done. The areas that can be edited are in the sections that follow.

**General**

In this section of the review, Approvers can update the following fields of General information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cart Name</strong></td>
<td>The system will automatically assign a name for the Cart unless users choose a unique name.</td>
</tr>
<tr>
<td><strong>Priority</strong></td>
<td>Approvers can modify the “priority” of the order. This should be left at “normal” unless the PO is above department delegation and a time-sensitive or urgent purchase.</td>
</tr>
<tr>
<td><strong>Accounting Date</strong></td>
<td>This field should be left blank unless you wish to use funds from a future fiscal year. If using funds from the next fiscal year, enter 07/01/ and the year.</td>
</tr>
</tbody>
</table>
Ship to Address

The “Ship To” is the location where materials will be delivered. The Requestor designates a “Ship To” address at the time the requisition is prepared.

As the approver you will need to review the information and ensure it's the proper location. To edit this section, click on the pencil icon in the Shipping block. Approvers can then edit the contact information, and shipping address, send to supplier method or indicate if a prepayment is required.

Edit Shipping

Ship To *

CURRENT ADDRESS

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Danielle Hallow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone</td>
<td>+1 540-231-0548</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:daniellewh@vt.edu">daniellewh@vt.edu</a></td>
</tr>
<tr>
<td>Address Line 1</td>
<td>Procurement</td>
</tr>
<tr>
<td>Address Line 2</td>
<td>North End Center</td>
</tr>
<tr>
<td>City</td>
<td>Blacksburg</td>
</tr>
<tr>
<td>State</td>
<td>VA</td>
</tr>
<tr>
<td>Zip Code</td>
<td>24061</td>
</tr>
<tr>
<td>Country</td>
<td>United States</td>
</tr>
</tbody>
</table>

Search additional  Results Per Page 10

Delivery Options

<table>
<thead>
<tr>
<th>Ship Via</th>
<th>Best Carrier-Special, See Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send to Supplier</td>
<td>SolQuest Will Deliver</td>
</tr>
</tbody>
</table>

Notify AP-Prepayment
Bill To Address

The “Bill To” address will be Accounts Payable in the Controller’s Office. This address should not be edited.

Purchase Order Funding

As the approver you will need to review the funding information closely to ensure accurate fund, org, and account codes are being used.

To edit the funding information, select the pencil icon

After the updates are made select “save” to apply changes.

A comprehensive list of university account codes may be viewed here: https://www.controller.vt.edu/accountcodes.html
Returning to the Requisitioner

As an Approver there may be times that you will need to return the requisition back to the requisitioner to make changes.

From the drop-down action items select “Return to Requisitioner”

**Please note, the requisition must be assigned to the approver to have this action as an option.

This will allow you to include a comment explaining why you are returning the requisition.

When done, select “Save Changes” to complete the action.
Rejecting a Requisition

Should you need to reject the requisition entirely, this action can be done, however, it will no longer be salvageable to the requisitioner, and it will remain permanently rejected.

A comment box will open which allows the Approver to add specific notes about the rejection. The note can be seen in the PO history.
**Adding a Comment**

**Adding Comments to PR or PO**

Approvers have the ability to add comments to the PR or PO. 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 a HokieMart user to submit a receipt
- To add an attachment
- To add a comment to a PR/PO after the PR/PO has been processed

To add a comment:

Select the **Comments tab**

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

- All
- Requisition
- Purchase Order
- Invoice
- Receipt

We recommend leaving this set to All.
To add a new comment, select the “+” symbol

Type desired comment

Add recipient for the comment or select one of the recipients already listed

Include attachment to comment (optional)

When satisfied with the comment select the check mark symbol.

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

**Please note, comments cannot be deleted or edited once posted to the document. Anyone with access to view this purchase order in HokieMart can see the comments.**
Approval Workflow and History of the Requisition

History Tab

This tab provides the entire history of the requisition process from creation by the Requestor and the individual steps in the process.

AnApprover can view the approval steps and any history pertaining to the requisition by selecting the “History” tab.
Workflow

This section provides the workflow of the requisition and lists all of the approval stages before the requisition is completed and turned into a PO.
Other Actions

There are additional steps that may be taken from the drop-down menu. If you have chosen “Assign” to place a requisition in your “Approvals” folder, you must take action on the requisition. You do, however, have the ability to take alternative actions.

Return to Shared Folder - places the requisition back into the organization folder. This will release you from the approver responsibility and allow another approver to assign the requisition.

Place on Hold - there may be times that you wish to delay action. By using this option, it will not require any action until you change the date.

Forward to - this will forward the requisition to another assigned Approver. If this option is selected, you will be able to choose another Approver to assume responsibility for approving the requisition.
**General Contact Information**

**HokieMart**
Questions concerning HokieMart functions (rejected/pending PRs and POs), appropriate form usage and procedures, vendor receipt of orders: **HokieMart@vt.edu**

**Accounts Payable**
Questions concerning the payment of invoices, encumbrances, and expenditures: Accounts Payable **acctpay@vt.edu**

**Receiving**
Questions concerning electronic receiving: Accounts Payable **acctpay@vt.edu**

**Banner Reports**
Questions concerning Banner Finance Reports: General Accounting **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**

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**