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Introduction to HokieMart

The Procurement Department is the Virginia Tech department responsible for overall management of the university's procurement system for the provision of goods, services, insurance and non-capitol construction.

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

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

After the requisition is submitted and approved in HokieMart, a Purchase Order number is created.

Typically, a single user may serve as both a Requestor and Receiver. Usually, an Approver has only that single role.

HokieMart provides a central receiving 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
HokieMart Workflow

Cart
Choose correct HokieMart Form, Punchout or Hosted catalog

Requisition
Enter proper Account codes, once submitted it becomes a Requisition and is assigned a Requisition number, then sent to appropriate approver (if over department’s delegation PR is automatically sent to Procurement for processing)

Approver
PR electronically delivered to Approver. When approval is processed the PO is created, PO number is assigned

Invoicing/Payment
PO invoiced to Accounts Payable Payment made to vendor

Receiving Goods
Confirm that services were rendered or goods were received Complete receiving action on PO in HokieMart. Receipt electronically processed

Supplier
Receives PO Fulfills goods/services

Reconciliation
After department is appropriately charged, designated reconciler will review transactions on a monthly basis

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

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

Use drop down arrow to narrow search

The Cart icon show the associated dollar value of items in your Carts

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 **Home** icon brings you back to the main shopping page.

The **Orders** icon allows you to search for documents including requisitions, purchase orders and invoices.

The **Accounts Payable** icon allows you to view invoice information.

The **Reporting** icon allows you access to reports based on role.

The **Suppliers** icon allows you to search for current suppliers.

The **Contracts** icon allows you to view University Contracts.

The **Shop** icon provides you access to the shopping options and carts.

Administer & Setup only available to HokieMart administrators.
Shopping Home Page

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

University Forms
Direct Pay, ISR, Reimbursement Req, Travel Auth, VT Diverse Vendor Search

Procurement Forms
Ship to Address Request Form, Contract Mod Request Form, Solicitation Request Form

The Organization Message displays announcements from Procurement

The Featured Suppliers Shows tiles of Punchout and Hosted catalog suppliers
Searching for Carts, Orders and Documents

There are several ways to search for Carts (Items that have not been submitted for a requisition) and Pending Orders/Requests (Items that have been submitted as a requisition).

(1) Go to the left bar and select Shop, then My Carts and Orders
(2) Open My Active Shopping Cart which will show any cart that is in progress and not assigned
(3) Open View Carts to see both Active Carts and Carts Assigned
(4) Open View My Orders to view orders you have created in the past 90 days
Orders Search

(1) Go to the left bar and select Orders

(2) Go to the Search which allow you to search for Requisitions, and Purchase Orders

(1) Filters are in the left column to narrow your search
(2) Another option is available to Add Filter

Find previously saved searched on the left side under Manage Searches by clicking on My Searches

Use the Gear on the right side to create a custom filter and reorder columns
Saving a Search
To save a custom search after filters have been selected.

- Select the “Save As” icon

- Save the search with a Nickname so you can easily identify it for future uses.

- Select Save
**User Roles**

Roles in HokieMart are assigned to a particular user based on information received from departments and levels of responsibilities within individual departments and are controlled within the HokieMart application.

**Requestor**
The Requestor is the individual (user) 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 On Behalf-of- Requestor is an individual who initiates the electronic purchase of goods and services “on behalf of” the Requestor who is authorized to use HokieMart.

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

**Receiver**
The Receiver verifies receipt of goods/services. All or part of the order may be received depending on delivery (backorders, damaged goods, etc.). The Receiver enters HokieMart and electronically “receives” the goods/services.

**Delegated Purchasing Authority**
University Policy 3015, Contract Signature Policy and Procedures, delegates to department heads the authority to enact purchases of goods and services valued up to $10,000 per transaction. Department heads may select faculty and staff within their department to exercise this authority. However, the department head remains responsible for the correct exercise of delegated purchasing authority and must ensure that personnel are properly trained and supervised; that all rules and procedures are followed; and that prices being paid are fair and reasonable.
At dollar amounts up to $10,000, price competition among vendors is not required, but is certainly encouraged. Once the vendor is selected, a firm fixed price, inclusive of all charges for handling, shipping, tax (if any), etc., should be determined and a HokieMart requisition prepared.

**Purchase Requisitions Exceeding $10,000**

When a Purchase Requisition (PR) exceeds the ten-thousand-dollar ($10,000) limit and the supplier is not a contract supplier, the PR will automatically be routed in the workflow to the Procurement Department after approval(s) by the organization.

The buyers in the Procurement Department will process the PR.

You will see the step “Procurement Approval” in the workflow for requisitions that are above departmental delegation. Once a requisition has been assigned to a buyer, you will see that buyer’s name.

For orders that require processing by an ITPALS buyer, you will see the workflow step “ITPALS Approval.”
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:

- Microsoft Edge
- Google Chrome
- Mozilla Firefox
- Apple Safari

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.
**Popup Blockers**

Popup blockers should be disabled when using HokieMart. Some of the punch-out sites open in a new window and will not open if you have popup blockers enabled.

If you are unable to open a punchout and see this icon in your web address, your browser is blocking pop-ups from HokieMart.

Click on the icon and select “Always allow pop-ups and redirects from https://solutions.sciquest.com” to enable pop-ups from Hokiemart. Doing this will save your settings when accessing Hokiemart in future sessions.
Troubleshooting

If you’re experiencing difficulty with pages loading in HokieMart, try clearing your browser history.

Click on the Tools menu for your browser.

Click on “History”

Click “Clear browsing data”

Open a new session of the browser and try accessing HokieMart again.

If users are experiencing outages or additional issues with HokieMart, they should report them to hokiemart@vt.edu.
**Time-Out Sessions**

HokieMart will time-out after one hour of inactivity. If a user has not been active in the application during that time period, the application will become inactive and the user must log in again.

It is important to note that individual punchouts have time-out periods. These, however, are determined by the vendor. It is suggested that if users will not be active in HokieMart for an extended period of time, they should save the cart.
User Information and Settings

My Profile

To access your profile settings, select the silhouette icon in the upper right-hand corner.

Select “View my Profile:

User’s name, phone number, email, etc. is set up at the time your access to HokieMart is granted. Users cannot edit this information themselves. If changes are needed, send an email to General Accounting in the Controller’s office genactg@vt.edu.
User Default Settings

There are defaults available for each user that will auto-populate within the current forms. Once you have selected your profile, select “Default User Settings”

To add a department’s fund codes as a default, select each tab and “Edit”

Under the Codes tab, each field has “Edit” as an option. The only fields required when creating and processing a Purchase Requisition are Fund and Account. All HokieMart users must enter at least one Fund and Account combination. The department information,
known as Organization (Org) information, will populate automatically when the fund number is entered in the field. The system will only let the user enter fund information authorized by the Controller's office.

**Account Code Favorites**

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the “Add” button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

As accounts are selected by the user, they will appear in a list on the screen. **It is recommended that default account codes not be created.** Users should verify the account code when the requisition is being prepared.

Accounting Code Favorites allows a user to create a name for a saved combination of fund and account (and activity code if applicable).

- Enter the nickname for the new favorite being created.
• Enter the codes for the favorite such as fund code, account code, and activity code if applicable.
• Click the save button when complete.

When entering funding in a cart, the favorite can be used. Select the favorite code from the list as stated below which will default the saved values such as fund code, account code, and activity code.

This process should be helpful when splitting the same funds and account codes regularly.

**Default Addresses**
The user’s default address information should be populated prior to using HokieMart. The “Ship To” addresses in HokieMart are the current addresses in Banner. The only acceptable “Ship To” addresses allowed in HokieMart are official addresses previously determined by the University.

**Ship To**

The “Ship To” address will be the address users would like the item(s) delivered. Some departments have just one “ship to” address that is used daily. For some departments, addresses will vary. For this reason, users will have the ability to select multiple default “Ship To” addresses.
To save a “Ship To” address to your profile in HokieMart, users are able to search all available addresses.

Click “Select Addresses for Profile.” Users may find it easier to enter their department name or building name in the “Address Text” field.

Select “Search.” Type in a key word(s) from the address you are searching. The text field is not case sensitive. The address information will then be displayed. Depending on information entered, the listing may be long.

To add the address to your profile

- Place the cursor in the “radio” button and click. The address will be displayed.
- The users name field will default to “.”. Type users name in Contact Name field. So that this will display on Purchase Requisitions (PR’s).
- Click “Save.”
If only one address is needed, it will appear as the default. If additional addresses are necessary, users have the ability to select a particular address as their default.

Users have the ability to select multiple “Ship To” addresses based on their needs and the needs of their department.

To select additional addresses:

- Click “Select Addresses for Profile”
- Follow the above steps for adding address information.
Assigned Roles

Roles are assigned to a particular user based on information received from departments and levels of responsibilities within individual departments and are controlled within the HokieMart application.

To view your assigned role(s), click on “Assigned Roles” under the “User Roles and Access” option.

If roles need to be changed or updated, complete the appropriate HokieMart Access Request Form and mail it to the Controller’s Office.

Access

The Access page displays the level of visibility the user has been granted when conducting a search for documents, such as purchase orders and requisitions.
Notification Preferences

When actions are performed in HokieMart, emails can be generated to notify users of these actions. We recommend users check these email notification boxes to increase the level of individual notification. To edit notifications preferences, access your profile in HokieMart.

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

**None (Default)** – no notifications are delivered by the system

**Email** - will send an email to your 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).

Once you have made your edits click the save changes button and you’re done.
The Procurement Department recommends user select at minimum these nine (9) options:

**Related to Purchase Requisitions (PR's):**
- PR Workflow complete/PO created
- PR line items rejected
- Cart/PR rejected/returned

**Related to Purchase Orders (PO's)**
- PO Workflow Notification Available
- PO Workflow Complete
- PO Line item(s) rejected
- PO Rejected

**Settlement**
- Invoice Requires Receipt Notice
- Invoice line Item(s) Complete/Rejected

*Tip: If you would like an explanation of the notification, hover your mouse over the icon next to each notification listed for a more detailed description.*
**HokieMart Forms**

There are 7 basic forms that allow users to enter Purchase Requisitions in HokieMart. In this section, the various forms will be reviewed. The section entitled, Processing Orders in HokieMart will provide details on how to enter an order after selecting the correct form.

1. Hosted Catalog  
4. Direct Pay  
7. Travel Agency Authorization

2. Punch-out  
5. Interdepartmental Service Request (ISR)

3. Non-Catalog  
6. Reimbursement Request

It is important to understand the use of each form type so that when you enter your order, you are choosing the appropriate form. Choosing the wrong form can lead to cancellations and delays in processing.

**Types of Suppliers**

There are three basic types of vendors/suppliers in HokieMart:

- Hosted Catalog Suppliers,
- Punchout Suppliers, and
- Non-Catalog Item Suppliers.

The type of suppliers you select will dictate the manner in which you search for products and process your order in HokieMart.

Some suppliers have negotiated contracts with Virginia Tech or other state agencies. The next section will cover more detail on how to search for suppliers with contracts and how to add those contract numbers on to your requisitions.
Contract Suppliers

University contract suppliers are distinguished by the symbol 🌟 to the right of the vendor. Examples of contract suppliers are Fisher Scientific, Sigma-Aldrich, and VWR International. University departments have unlimited purchasing authority when using contract suppliers with the exception of a $100,000 limit on the purchase of computers from the suppliers Apple and Dell.

Using the contracts feature in HokieMart will allow users the ability to:

- view contracts available to their department
- review information about a contract (dates, description, etc.)
- search for a contract
Selecting a Contract on a Requisition

When entering an order in HokieMart, the contract number will automatically populate on your requisition when the contract is a university-wide contract (available for all users).

"Select contract" will appear only when a contract may be university-wide but not all good/services are included in the contract.

To select a contract, select the pencil icon on the line item.

Click on “Select contract.....”
Select the contract from the drop down list and Save.

Viewing Contracts
These instructions will allow users to identify which contracts are available to them and whether they have visibility privileges to a specific contract. Privileges, full or partial viewing, will be possible.

From the Main Screen of HokieMart,

- Click on [Contracts] on the task bar on the left-hand side of the screen as shown in the previous section.
- Enter desired supplier, item description, or contract name.
- Click [Search]
- If you wish to view general information about all contracts, select Search without typing in the search bar. A listing of all contracts will be displayed.
Click on the desired contract number for detailed information about the contract. In this example, Guy Brown was chosen.

### General Contract Information
Contracts are set up with the ordering address. Payment addresses against contracts may not be listed in the supplier search. Please choose the ordering address (usually the bold address) and the Controller's Office will process the payment to the correct payment address.

#### Copier Contracts
**New Copier Purchase and First Year Maintenance Agreements:** Process new copier purchase and first-year maintenance agreements on a Non-Catalog Item form without selecting the contract. The Procurement Department will continue to process a university PO for copier rental or for the new copier and initial (first year) maintenance agreement.

**Copier Maintenance/Rental payments:** Process as a contract purchase by selecting the contract on the Non-Catalog form.

#### Software and Equipment Maintenance Agreements
To make maintenance payments for software and equipment agreements for multiple years greater than $2,000, process the Non-Catalog Item form selecting the original PO number generated for maintenance.

### Contract Warning Message
A warning message will be displayed to remind the user to select “HokieMart Will Deliver” or “User Will Deliver” (the user is now responsible for sending the PO to the vendor). After selecting the desired delivery method, proceed to complete the PR.

### For Issues With A Contract
If you process a PR to a supplier which you believed to be a contract supplier, but the contract selection process is not available, please contact the HokieMart Helpline hokiemart@vt.edu. Provide the supplier name and contract number. The problem will be researched and a response sent to the user, advising on the availability of this contract.
Hosted Catalogs

HokieMart Will Deliver OR User Will Deliver

Hosted Catalogs allow users to search for a particular item with suppliers who have a catalog housed within HokieMart. Items in a hosted catalog will show up in the shop section or you can access by using the catalog tile.

To use the simple search feature from the Shopping Home Page in HokieMart:

- Place the cursor in the field located in the upper center portion of the screen
- Enter an item description (for example “test tube”)
- Click the magnifying glass to search

The requested search information will be displayed.

Scroll down to view all item options. Select the desired item and enter quantity and click “Add to Cart”
Preferred suppliers with hosted catalogs have an icon under the Hosted Catalog Suppliers section on the home page of HokieMart. To shop a hosted catalog from a preferred supplier, click on the icon/tile and enter what you are looking for in the search bar.

Click the magnifying glass to search
Select item and enter quantity and select “Add to Cart”

Once items have been added to your cart, you will need to select the Cart icon at the top and Select “View Cart”

You can select “Checkout” to proceed with submitting your requisition.

Note: It is highly recommended that you utilize the Hosted Catalog suppliers who have a tile on the home page of HokieMart. These catalog suppliers offer Virginia Tech the best pricing and negotiated terms.
**Punchout Vendors**

**HokieMart Will Deliver OR User Will Deliver**

Punchout suppliers are contracted vendors and punchouts should be utilized whenever possible over using a non-catalog form. Punchouts have unlimited departmental purchasing authority EXCEPT for computer technology (Dell and Apple) which is capped at $100,000.

Punch-outs are maintained on the Supplier's website. Click on the icon on for the supplier to be redirected to the Supplier's website.

- Select desire Punch-out supplier

Users will be directed to the supplier's website. When searching for items, the dollar value displayed will be the contract/discounted price. All of the Punchouts are similar, **but they are each a bit different in how items are placed into the shopping cart**.

It is important that when you are placing a punch-out order, you access the supplier's website via HokieMart.
When you punch out to a supplier site, enter the search criteria in the appropriate location, such as the suppliers search bar.

Add your item to the cart and click the check out or cart button depending on which site you are utilizing.

Submit your cart for approval within the Supplier catalog.
Tips:

- **External Notes and Attachments cannot be used with punch-out PO’s** – suppliers will not receive any external notes or external attachments on punch-out PO’s.
- **User may NOT copy a cart that was created through a punch-out**.
- **After returning to the cart, users may NOT add or delete items in the cart of the punch-out.**
Non-Catalog Item

HokieMart Will Deliver OR User Will Deliver

The Non-Catalog Item form allows users to purchase items that are non-travel-related and cannot be handled through the Hosted Catalog, Punch-outs, Direct Pay or Reimbursement Request form.

The Non-Catalog form can be found by selecting the cart icon under Shopping,

or on the home page of HokieMart

Select Non-Catalog Item to open a blank form.

A search box will be displayed allowing users to search for a particular supplier.
Begin entering a specific vendor. As the name is entered, possible matches will be displayed.

Select the desired supplier.

*Note: If the supplier you are looking for is not available, please see the section on Adding New Supplier/Address.*

Next:

- Enter Product Description of the item(s) being purchased.
- Enter Catalog No. when available.
- Enter desired Quantity (cannot be zero - 0).
- Enter a Price for the item(s). A dollar amount must be provided.
- From the drop-down menu, choose Packaging option if known (EA, LO, PK, etc.).

When only one item is to be ordered,
• Click Save
• User will now be in the Home Screen of HokieMart.
• Click on the shopping cart icon in the upper right-hand corner of the screen to access the draft cart.

If multiple items are being ordered from the same vendor,

• Click Save and Add Another after adding each item.
• When finished shopping click Save
• User will now be in the Main Screen of HokieMart.
• Click on the shopping cart icon in the upper right-hand corner of the screen to access the draft cart.

Users will now have the option to:

• View the cart and continue shopping or
• Go directly to the Requisition Summary screen which allows the requester to add funding information in the Cart Draft Requisition
• Complete the PR
Direct Pay

HokieMart will not deliver PO
Direct Pay is used only for item(s) explicitly listed on the Direct Pay Policy - University Policy 3220.

- From the main Shopping Home Page select “Direct Pay”
- Begin typing Supplier Name
- Select Desired Supplier
Next in the “General Info” section of the form, enter required information:

- Catalog No. - should display DP (Do not edit)
- Product description – type a description of what is being paid.
- Quantity - leave at 1. This is one payment.
- Packaging - most often will remain EA – each
- Estimated Price – the requestor should be in possession of an invoice or bill showing the total cost.
- Payment Category may be selected from the Payment Category drop-down list.

- When complete, from the drop-down list on the top of the screen, click “Add and go to Cart.”

- If additional items are to be ordered from the same vendor, click “Add to Cart and Return.” This will provide the user with the option to add additional items to the cart.

To finalize the Direct Pay once all items have been added, select “Add and go to Cart” from the Available Actions drop-down menu to return to your Cart – Draft Requisition.

User will now be in the Cart – Draft Requisition. Complete the cart to create the PR.
### Direct Pay (example)

<table>
<thead>
<tr>
<th>Supplier Info</th>
<th>National Association of Educational Procurement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier</td>
<td></td>
</tr>
<tr>
<td>Fulfillment Address</td>
<td>Order Address L (preferred)</td>
</tr>
<tr>
<td></td>
<td>450 Wireless Rd</td>
</tr>
<tr>
<td></td>
<td>Hauppauge, NY 11788 US</td>
</tr>
<tr>
<td>Supplier Phone</td>
<td>+1 (631) 273-2800</td>
</tr>
<tr>
<td>Fax</td>
<td>+1 (631) 962-2866</td>
</tr>
</tbody>
</table>

### Distribution

- The system will distribute purchase orders using the method(s) indicated below:

<table>
<thead>
<tr>
<th>Form Type</th>
<th>Direct Pay (HokeMart will not deliver PO)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalog No.</td>
<td>10</td>
</tr>
<tr>
<td>Product Description</td>
<td>2014 Annual Membership for the department</td>
</tr>
</tbody>
</table>

| Quantity | 1 |
| Packaging (UOM) | YR - Year |
| Estimated Price | 1,000.00 |

### Direct Pay Tips

- **Memberships and Association Dues**
  - Payment Category A16
  - Account Code 12210

- **Processing Payments to Other State Agencies**
  - Payment Category A6
  - Account Code 12440

- **Payment to the U. S. Immigration and Naturalization Service**
  - Payment Category A6
  - Account Code 12472

- **Purchasing Pitney Bowes Postage**
  - Payment Category A2
Interdepartmental Service Request (ISR)

HokieMart will deliver PO
The Interdepartmental Service Request (ISR) form is used to process orders to all university suppliers and Service Centers listed on the drop-down menu of the form. Service Centers/Suppliers are added on a continuous basis.

From the Main Screen of HokieMart:
- Select “Interdepartmental Service Request.”

From the drop-down menu:
- Choose the desired VT supplier.
- Complete list of Virginia Tech internal university suppliers can be found at: https://www.procurement.vt.edu/content/dam/procurement_vt_edu/hokiema rt/Internal_Vendor_Listing.pdf

In the General Info section, enter all information.
- Catalog No. should display ISR (Do not edit)
- Product description allows the user to identify what is purchased.
- Quantity - leave at 1. This is one service request.
- Packaging defaults to EA – each
- Estimated Price – enter how much you think the request will cost

Complete the “External Notes” portion of the form. If this portion is not completed, error messages will appear and the user cannot submit the PR. All areas are required.

- If attachments are necessary, Click “add attachment.”

Browse and attach any document(s) that need to be sent with the ISR. These attachments must be done as External Attachments.

- Close the attachment box. The attachment name will appear in the box.

From the Available Actions drop-down menu:
• Click Add and go to Cart
• When finished shopping click Save and Close

User will now be in the Main Screen of HokieMart. Click on the shopping cart icon in the upper right-hand corner of the screen to access the draft cart.

User will now have the option to view the cart and continue shopping or go directly to the Requisition Summary screen which allows the requisitioner to add funding information in the Cart Draft Requisition. Complete the PR.

**Account Codes for ISRs**
When entering ISRs for internal suppliers in HokieMart who are official University Service Centers, The account code on all transactions must always be 1244R. If an account code other than 1244R is entered on the ISR, the PO that was generated will be closed and you will be asked to process a new request through HokieMart with the correct account code. A complete list of official University Service Center HokieMart Suppliers can be found at the following link:
https://www.procurement.vt.edu/content/dam/procurement_vt_edu/hokiemart/service_ctrs.pdf

**Receiving ISRs**
Please note that departments submitting ISRs to any Internal Service Unit through HokieMart **do not need to do receiving in HokieMart** or send a paper copy of the invoice to the Controller's Office. The individual service area will process the billings through Banner.
Travel Agency Authorization

HokieMart Will Deliver PO
Use this form to purchase airline tickets and other travel related services from contract travel agencies listed on the drop-down menu of the Travel Agency Authorization. Do not use this form for travel reimbursements to university faculty or staff. See the Controller’s website for information related to travel and travel reimbursements.

From Main Screen of HokieMart:

- Click Travel Agency Authorization

![Image of HokieMart interface]

- From the drop-down menu choose the desired contract vendor.

![Image of drop-down menu]

Next in the “General Info” section of the form, enter required information:

- Catalog No. – type the traveler’s name. Be sure to use legal name.
- Product Description is the location to provide information for the travel agent. Be as specific as necessary to ensure proper travel is arranged.
- Quantity will be 1. This will be for one traveler.
- Packaging - will remain EA – each
- Estimated price will be for the travel and all associated costs.
Complete required information in the Internal and External Info section as necessary.
Attachments may be added to Internal and External Info, such as an itinerary, if necessary.

To finalize the Travel Agency Authorization from the Available Actions drop-down menu, select:
- Click Add and go to Cart
- Then click Go

User will now be in the **Cart – Draft Requisition**. Complete the cart to create the PR.
Processing Orders in HokieMart

Once the requestor has determined which HokieMart screen form is required to complete the desired electronic procurement transaction, this section will outline the steps to complete the Shopping Cart and finalize the Purchase Requisition (PR).

Create the Cart

Choose the appropriate form from the HokieMart main screen

- You can search the Hosted Catalog, select a vendor from the Punch-out, submit a Non-Catalog item or choose one of the University forms.
- Complete the HokieMart Form
- Navigate to the Shopping Cart

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

University Forms
Direct Pay, ISR, Reimbursement Req, Travel Auth, VT Diverse

The Featured Suppliers
Shows tiles of Punch-out and Hosted catalog setup

Shopping cart
**Edit the Cart**

Users should now take a moment to edit (add additional information) to the shopping cart. There is a last chance to edit information during the Final Review. **Regardless of the screen form used, the information and fields required in to complete the Cart are the same.**

**Cart Name** - Users have the ability to give the cart a unique name. This is optional, but helpful when searching for past requisitions. If users purchase the same items frequently from the same supplier, it may be helpful to give the cart a unique name. Users can view past purchases by the cart name.

**Priority** - Users are able to set the priority of the PR. By default the priority will be Normal. There is a drop-down menu with the option of Urgent. Use this option ONLY when a PR is of critical importance AND it is above departmental delegation. Most PRs will be Normal.

**Date Field** - This field should be left blank. The exception is just prior to the end of the fiscal year. At that time, users may enter the date of July 1 and current year. This will ensure the invoice will be paid out of the next fiscal year's budget.

**Notify AP-Prepayment** - See Prepayment Notification in this Guide for additional instructions.

**Prepared For (On-Behalf-Of)** - This feature is used by the On-Behalf-of Requestor. The PR is prepared for another Requestor or “Shared Department.” The selection may be made here or in the Final Review. For information addition information on this topic refer to the On-Behalf-Of Requestor section.

**Internal Notes** - notes intended for department and/or university. (see section below for more detail)

- Click in the box and type to add desired note.
Send to Supplier? – Verify the delivery methods

- "HokieMart Will Deliver" (default) means the system will automatically deliver a copy of the PO to the vendor.
- "User Will Deliver" means the user will email or fax a copy of the PO to the vendor outside of the HokieMart system.

In most cases, "HokieMart will Deliver" will be the correct response.

If the delivery method should be changed;

- Click "Select from profile values."
- From the drop down menu, choose:
  - "HokieMart Will Deliver" or "User Will Deliver."

Once complete, select "Proceed to Checkout."
Removing Items from a Cart

When the user wishes to remove items from an active cart.

- Place a check mark in the box next to the item to be removed.

- Select

- Highlight and select “Remove”

To remove multiple line items, select the check boxes and the arrow pointing down

You now have the option to “Remove Selected Items” or “Remove All Items”
Moving Items to Another Cart

When user is in a **draft cart** and wishes to move an item(s) to a new cart:

- Place a check mark in the right-hand box of the line item that you wish to move.

- Select

- **Select Move to Another Cart**

- You can either move the line item to a new cart or a draft cart
Final Review

After selecting “**Proceed to Checkout**,” users will be ready to complete the processing the requisition.

There is a visible checklist showing information that is still required to submit the requisition.

There is information the requisitioner may want to edit in the General and Shipping sections. The Billing section will always remain as the defaulted information.
General displays data entered during the Edit the Cart section. At this time, On-behalf-of users should select a different user, if they haven't already done so. In the upper portion of the general section, select .

To prepare the requisition “On Behalf” of a different user, enter name of the user you wish to purchase on behalf of and click Search.

- Possible choices will be displayed. Find the particular user from the list and choose Select.
- When complete, click “Save.”
Shipping
Shipping displays information regarding shipping and delivery data.

Users can edit the ship to address that they want their order to ship to here. All default addresses saved in the users profile will appear first, or users can search for an additional existing address in HokieMart.
The Ship Via should default to “Best Carrier-Special, See Comments.”

The user will have the chance to edit the delivery method to the supplier (either HokieMart Will Deliver or User Will Deliver).

The user can check the Notify AP-Prepayment box if a prepayment is required on this order.
Internal/External Notes and Attachments

Internal/External notes and attachments are used to communicate or notate information about an order internally or to communicate externally to the supplier. **Internal/External notes and attachments cannot be used on a Punchout Requisition.**

Internal notes and attachments remain internal to Hokiemart and are not viewable by the Supplier. Example uses are:

- To reference an item for a specific cart (“for Chemistry 101 lab class”, “Supplies for Dr. Bell”)
- For notes needed by the Procurement Department (“See attached bid”, “Confirming invoice”)
- Used to provide information to add a New Supplier

External notes and attachments are those intended for the Supplier to see. Example uses are:

- To communicate delivery instructions to the supplier (“deliver to loading dock”)
- To attach a quote you are referencing in your product description

Example of Internal and External notes and attachments on a requisition:

![Example Image]

Any attachments added through the Internal/External Notes and Attachments sections will also appear on the Attachments tab of the requisition and PO.
If you forget to add your attachment while processing your requisition, you can still add it through a comment after the requisition has been submitted or completed.
Funding Information

In this section, the fund and account are required. To edit or provide missing information, select “Edit.” The Accounting Codes box will open allowing:

- for changes to be made or
- information to be added.

Fund
The fund code may be displayed if one has been created as a default in the user profile. Some users have access to multiple funds. If the appropriate fund does not display or another fund should be used, users may use the search feature or type the fund code in.

A listing of available funds will be displayed from a drop-down list.
Highlight the appropriate fund code and click to select it.

Then “Save”

**Account Code**
Account codes are used by the Controller’s office to classify and categorize expenditures. It is important that correct account codes are used when entering purchases in HokieMart. For a quick reference of account codes see: Account Code Listing

- If the Value (account code) is known, it may be entered.

Frequently used account codes can be stored in the user’s profile. To learn how to add Account Code Favorites, see User Information and Settings: Account Code Favorites.

If the appropriate account code is in their profile, users may “Select from profile values.” If account codes are stored in the user’s profile, they will be displayed in a drop-down list by choosing “Select from profile value.” The appropriate selection may be made from this list.
Searching for Account Codes
If the account is not available from the user profile, users may need to search for the appropriate account code. To search for account code type in the search field.

Highlight the appropriate account code and click to select it.

Then “Save”
Submit the PR

After completing the “Final Review” the user is ready to submit the PR for processing.

- Click “Submit PR.”
- The PR is now complete
- A Requisition number will display
Withdraw the PR

A Requestor can withdraw a PR at any stage prior to it becoming a PO.

- Click on and select “My Pending Requisitions”

OR

- Perform a query by searching the PR number
- Select and open the desired PR
- In the upper right-hand corner of the Requisition select “Withdraw Entire Requisition”
- Include a comment for a reason for the withdrawal
- Select “OK”
- Status will be updated as “withdrawn”
Return PR to Requisitioner

An Approver has the ability to return the Purchase Requisition (PR) to the Requestor (requisitioner) for any changes/updates that need to be made. This will allow the Approver to return rather than reject the PR.

After the Approver has assigned and viewed the PR and returned, the Requestor will receive an automatic email with the URL link. When a requisition is returned by the Approver it reverts to a Draft Requisition.

Requestor should:

- Click on “cart.”
- Click on “draft carts.”
- Make the requested changes/updates and resubmit the PR into the workflow.

The PR number will remain the same as the original. All previous documentation and notes will be preserved. The requisition will restart the workflow from the beginning regardless of the step it was returned from.

A HokieMart system Notification or Email will be received by the Requestor notifying them of the return. The requestor must have “Cart/PR rejected/returned” checked in their Profile in order to receive the emails.

Automatic Return of Requisitions Rejected by Banner

A Banner budget authorization may fail due to an “invalid user,” “invalid accounts,” or “insufficient funds.” A feature will now return the rejected budget authorization PRs to the Requestor in the form of a draft cart. Users can now correct and resubmit the PR without having to create a new PR.

The user will receive an automatic email notification that the PR has been returned and that action is needed. The reason that the PR is being returned is included in the email.

Note: The user must have “Cart/rejected/returned” checked in their email preferences to receive this automatic email. (See User Profile for more information related to this topic).
Requisition and Purchase Order Follow Up

PR Approval Workflow
The purchase requisition is submitted into the HokieMart workflow and will proceed through several steps, including through each level of approval. After the PR has completed all approval levels, it will become a purchase order (PO).

The workflow can be viewed on the right-hand side of the requisition.

The first section provides an overview of the total cost on your requisition and shows the status (draft, pending approval, etc.).

The workflow shows each step that your order will proceed through.

A typical requisition workflow may look similar to this, or it may have additional approval steps in the process.

**Draft** – the requisition has not yet been submitted.

**Budget Auth** – the departmental budget is checked to verify that funds are available.

**Org Approval 1** – the first level approver can approve or reject all or part of a requisition.

*To view the approvers, click this step.*

**Budget Auth 2** – the departmental budget is checked a second time.

**Create PO** – the requisition becomes a PO.
Cancelling a PO
If your requisition has not yet been approved and progressed to a PO, you can withdraw it, or ask one of your approvers to reject or return the requisition to you.

If your requisition has been approved and is now a PO, you will need to do a couple of things to cancel it:

1. Contact the vendor and confirm with them that you are cancelling the PO.
2. Complete a cancelled receipt on the PO. For more information on how to complete receiving and step by step instructions for different receiving scenarios, please review the Receiver Guide.

Methods of Delivery
There are three methods of delivery:

1. Computer to Computer (CXML)

   original 2/17/2022 8:56:27 AM System PO Sent via CXML 200: OK

2. Fax

   original 12/20/2021 3:28:31 PM System Delivery Notification
             Delivered to: +1 540-639-6683
             Date and time of delivery: Dec 20, 2021 3:28:31 PM Number of pages delivered: 2 Delivery was made on attempt # 1
             Show less

   original 12/20/2021 3:23:30 PM System PO Sent via fax Out for fax delivery to +1 540-639-6683

3. Email

   original 12/20/2021 3:23:30 PM System PO Sent via PDF attached email becca@elevenwest.com

Please note that the method for delivery is determined by the vendor at the time of their setup.
Viewing PRs and POs
PRs and POs can be viewed for 90 days after completion using the drop down menu located under the user profile.

Or you can filter by date to view PRs and POs completed within certain time frames.
Additional filters can be viewed and selected when searching for PRs and POs.

To print a copy of your PR or PO, click the printer icon at the top right hand side of the screen. This will open the document in a new tab on your browser that you can print or save as a PDF.
Copying a Cart

Users can copy requisitions into a completely new cart, providing a very convenient way to repeat an order. Items can be removed or additional products can be added to the cart if needed.

- Locate an existing requisition
- Open the requisition
- From the Actions drop-down menu select Copy to New Cart

A new shopping cart is created with all line item(s) and requisition custom information included.

Copying a cart should be done with caution! Copying a cart copies all information. If you copy a requisition that was rejected for an error, that error will get copied.

Requisitions that were above departmental delegation should never be copied.
**Additional Actions**

**Adding a New Supplier/Address**

Sometimes the need arises to purchase from or use a vendor/supplier that is not currently listed in the HokieMart or Banner database. The Procurement Department must enter the vendor into the system, so the order can be processed through HokieMart and ultimately that the vendor can be paid through Banner.

Note that a new vendor/supplier can be an individual or a corporate entity.

*This procedure can also be used to communicate changes or updates to existing supplier information, such as addresses, phone or fax numbers.*

The requestor must select the appropriate form to process the order. The available form options for this type of situation would be either Non-Catalog Item or Reimbursement Request.

From the Main Screen of HokieMart, for this example we will select Non-Catalog Item:

- Choose and click desired form.
- After a search for the supplier has been attempted type the words “New Supplier” in the Supplier box. This will bring up the “New Supplier/Address” option.

![Add Non-Catalog Item](image)
The selection of the Fulfillment Address will default to VT Purchasing (Procurement) Department.

Continue to complete the information for the item as usual:

- Provide description
- Catalog No. if necessary
- Quantity
- Price
- Packaging
- Click “Save and Close”

Locate the Cart icon on the upper right-hand corner of the page to activate the dropdown menu.

Click **View My Cart** to navigate to the Cart – Draft Requisition where the Cart can be reviewed and edited or click **Checkout** to proceed to input your Requisition information.
• Scroll down to **Internal Notes and Attachments** section on the left-hand side of the cart.

• Select the pen icon to edit.

An Internal Note box will open.

• Type the information needed to set up a new supplier in the Internal Note box (see below)
In order to avoid delays processing the PR, the Procurement Department requests that the following information is provided to set up the New Supplier:

**For Vendors**
Put the following in the internal notes:
- Vendor name
- Address
- Phone and fax number - many HokieMart orders are faxed to suppliers
- And if available, the FIN or banner id (each separated by a semi colon)
- If using a supplier website, provide the website address

Click Save and complete the PR.

**For an Individual or Student**
If the vendor/supplier is a VT faculty, staff or student please put the following in the internal notes:
- First and last name (middle initial when available)
- Address
- Banner ID Number with the first 3 digits masked (XXX-456-789)
  - If the individual is a student only the last 4 of the banner id should be provided

**Due to PII policies, NEVER include social security numbers in the Internal Notes.**

Click Save and complete the PR.

**New Supplier /Vendor Follow Up**
The Vendor Team will add the new supplier if needed.

If the address already exists, the Vendor Team will select the supplier and may add a comment advising the user. The supplier will now be available for future use.

If the PR does not include the above supplier information, the PR will be rejected advising the department of the required information. The requestor will then need to copy the cart to a new cart and add all of the required information.

After the Procurement Department adds the new supplier, the PR will proceed through the approval workflow.
Best Vendor

When a department knows the item(s) that need to be ordered but are unsure of a supplier, a buyer in the Procurement Department can process the purchase order (PO). In order for the purchase requisition (PR) to be electronically delivered to Procurement, choose **Best Vendor** as the supplier. When using Best Vendor be sure to provide a detailed description of what you are purchasing and list an appropriate contact in your department for the Buyer to discuss your needs.

From the Main Screen of HokieMart:

- Open a Non-Catalog form
- Type “Best Vendor” in the Supplier Name field

The selection of the Fulfillment Address will default to VT Purchasing (Procurement) Department.

- Complete the PR.
**Split Funding**

There are two primary methods of splitting the funding between funds:

- the entire purchase (header level)
- by line item

**Split Funding at the Header Level**

When user wishes to split the funding on a PR at the header level (split the entire amount of the PR),

- Click the pencil icon in the right-hand corner in the Funding section to edit.

An **Accounting Codes** box will open.

- Click the + symbol to add a line of funding

Selecting the down arrow will allow you to enter split amounts by % of Price, % of Quantity, or Amount of Price.
It is highly recommended that users select the Amount of Price option. The % of Price or % of Quantity options will likely result in failed orders due to the way that Banner and HokieMart do their rounding differently.

Split Funding at the Line Item Level

- Go to line item and select **Accounting Codes**
- To add another funding line, select the + symbol
- Select the down to enter split amounts by Amount of Price

- Once additional funding lines are added, select **Save**

The Funding section of the requisition will now display “Values vary by line” to indicate that funding has been detailed to the line item level.

**Funding indicated on the line item level will override the fund chosen for the entire requisition.**

***Please note: when copying a cart, any funding detailed to the line item level will copy to the new cart line items.***
**Shared Department (or On Behalf Of)**

The purpose of a Shared Department PR is when a department is sharing the cost of purchasing particular goods or services with one or more departments.

*Note the steps to create a PR for a shared department are similar to the steps required to create a PR for an On Behalf Of requestor.*

There are two areas where users can create a Shared Department PR

**Option #1**

When processing the shopping chart, select the icon next to “Prepared for”

Search for the user “Shared Department”

- Last Name: **Department**
- First Name: **Shared**

Then click **Search**

If you are an On Behalf of Requestor entering the order on behalf of another user in your department, you would search for that user here.
Select the “+” symbol to add the Shared Department user to your Shopping Cart

The Shopping Cart has been updated to reflect “Shared Department” or another user

**Option #2**

If the user forgot to create a Shared Department request while creating the Shopping Cart, the requestor has a second opportunity to input this information.

Before submitting the PR, users can edit the General section by selecting the symbol

Follow steps above in Option#1 to search, select, and update the “Prepared for” field to “Shared Department” or other desired user.
Adding a Comment

Adding Comments to PR or PO
Requestors and 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 an Approver or other HokieMart user that a PR is ready for approval
- 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

To add a new comment, select the “+” symbol
When satisfied with comment select symbol.

The comment has now become a permanent part of the Purchase Order.
SCHEV Orders

It is critical that when entering multiple SCHEV numbers that they be entered exactly as shown below (with no spaces inserted in the SCHEV number). This information is to be added in External Notes section of the HokieMart form.

1. Order for one fixed asset (i.e. one SCHEV number):
   ETF=2080640151

2. Order containing multiple fixed assets in a given range (i.e. the range below would account for 4015,4016,4017,4018,4019,4020,4021):
   ETF=2080640151,2080640171,2080640211

3. Order containing multiple fixed assets not in a consistent range:
   ETF=2080640151,2080640171,2080640211

SCHEV orders to the same vendor should be consolidated to one PO if possible, rather than placing a separate PO for each item ordered on SCHEV funding to the same vendor.
Prepayment Notification

Prepayment Notification is a feature that alerts the accounts payable department that a check must be cut and sent on to a vendor/supplier, prior to receipt of goods and/or services.

Although it is not the policy of the university to prepay for goods and/or service, there are times a vendor/supplier must be paid in advance, such as magazine subscription, conference registration or a partial deposit payment. Another common prepayment is for events where the check is to be presented by the department directly to the vendor on the day of an event, for example, an honorarium or speaker fee.

To indicate that your order requires prepayment, select “Notify AP-Prepayment” on your requisition to route your PO to Accounts Payable.

From your shopping cart, select the check box next to “Notify AP-Prepayment” to mark your requisition as an order that needs to be prepaid.
If you forget to check this box while in the Shopping Cart, you can still edit this field when processing your Requisition. It will be located under the Shipping block.

Supporting documentation will need to be attached to the requisition electronically as an Internal Attachment.

**Guidelines for Prepayments**
- Cannot be made more than 90 days prior to the date of an event or start of service unless there is a monetary advantage to the University. If greater than 90 days, special permission must be granted by Accounts Payable.
- Maximum allowed for prepayment for goods and services contracts/agreements is 50%
- AP cannot pay from a quote or proforma invoice
- AP must have documentation from the company stating prepayment or deposit is required

**Procurement Request Forms**
There are three Procurement Related Forms located on the home page of HokieMart:

1. Ship to Address Request Form
2. Contract Mod Request Form
3. Solicitation Request Form

These forms are not used to purchase goods or services, but rather are used to make various requests to Procurement.
Ship to Address Request Form

The Ship to Address Request Form is used to notify Procurement of a request to add or make a change to a Virginia Tech ship to address location. *Please note that new requests must be for an affiliated Virginia Tech address.*

To open up a new form, click on the Ship to Address Request tile on the home page of HokieMart.

**Instructions**

The left-hand side will show some auto generated information, such as the form number and status, and a list of the tabs you will need to fill out prior to submitting the form.

Click Next to begin your request.

**Attachments**
Users have the option to add any supporting documentation that would help explain their request. Attachments are optional and not required to submit your request.

Questions
The first section of information that must be filled out is the General Information.

- Enter the current date for Date of Request.
- Enter your department as the requestor on the form.
- Enter your phone number to be used for any follow up questions regarding this form.

Next, indicate the type of request from the drop down down.
• Select **Add a New Ship to Address** to request a completely new Virginia Tech ship to address that does not already exist in Hokiemart.
• Select **Change to an existing Ship to Address** to request an edit to an existing Virginia Tech address in Hokiemart.

Once a selection is made, additional questions depending on the type of request will appear.
Add a New Ship to Address Questions

- Enter the following information:
  - Department name
  - Room and Building (if not applicable, type NA)
  - Street Number and Name
  - City
  - State
  - Zip Code
  - And the current Virginia Tech Mail Code at that location
Change to an existing Ship to Address Questions

- Enter the Current Ship to Address that needs to edited

- Enter the following information as you want the edited address to appear in HokieMart:
  - Department name
  - Room and Building (if not applicable, type NA)
  - Street Number and Name
  - City
  - State
  - Zip Code

Please note, enter information in each box, even if it is staying the same.
Both the **Add a New Ship to Address** and **Change to an existing Ship to Address** forms require a Reason for Request.

For example, a department may have moved offices and needs their ship to address updated or there is a new building established on campus that needs a new ship to address.

Once all of the Questions are filled out, click Save Progress and then click Next to progress to the Review and Submit page.
Review and Submit
The final page of the form provides a check to ensure all required fields were completed.

If any of the required fields were not completed, you can use the menu on the left hand side to navigate back to the tab that needs to be fully completed before submission.

Once everything is complete, click Submit.

Select Yes to confirm submission of the form.

Once submitted, the Status of the form changes to “Under Review”. You can view where the form is in the workflow by clicking Form Approvals.
Once approved, you will receive an email from a Procurement Form Approver confirming that the changes are made or the new address has been added in to HokieMart. The form will also show in approved Status.
Contract Mod Request Form

The Contract Mod Request Form is used to notify Procurement of a modification to an existing contract with a Virginia Tech vendor.

To open up a new form, click on the Contract Mod Request tile on the home page of HokieMart.

Instructions

The left-hand side will show some auto generated information, such as the form number and status, and a list of the tabs you will need to fill out prior to submitting the form.

Click Next to begin your request.
The Details tab shows auto populated details about this specific form. There is nothing the user needs to fill out on this tab. Click next to begin the form.

Users have the option to add any supporting documentation that would help explain their request. Attachments are optional and not required to submit your request.
Questions

The first section of information that must be filled out is the Contract Information.

Enter the following Contract information:

- Current date as the Date of Request
- Department Name
- Name of the Contract Administrator
- Contract Administrator's Phone number
- Contract Number
- Vendor Name
- Indicate if the contract is an ITPALS Contract

Helpful tip: Hover your mouse over the icon to view help text!
Each Contract Mod form request must have a **Reason for Modification**. Select the reason and provide a brief description for the modification to the service or product.

Depending on the reason selected, additional text boxes may appear for an explanation of the modification.

**Review and Submit**
The final page of the form provides a check to ensure all required fields were completed.

If any of the required fields were not completed, you can use the menu on the left hand side to navigate back to the tab that needs to be fully completed before submission.
Once everything is complete, click Submit.

Select Yes to confirm submission of the form.

Once submitted, the Status of the form changes to “Under Review”. You can view where the form is in the workflow by clicking Form Approvals.

Once approved, you will receive an email from a Procurement Buyer confirming the changes have been added in to HokieMart. The form will also show in approved Status.
Solicitation Request Form

The Solicitation Request Form is used to notify Procurement of a request to create a solicitation for a good or service.

To open up a new form, click on the Solicitation Request tile on the home page of HokieMart.

Details

The Details tab shows auto populated details about this specific form. There is nothing the user needs to fill out on this tab. Click next to begin the form.

Attachments

Users have the option to add any supporting documentation that would help explain their request. Attachments are optional and not required to submit your request.
Questions
Fill out the following General Information regarding the nature of this solicitation request.

Type of Solicitation:
- RFP – Request for Proposal
- RFI – Request for Information
- IFB – Invitation for Bid
- RFQ – Request for Quotation
- Other

Choose one of the Purchasing Categories from the drop down menu. This should pertain to the type of good or service that is being solicited.

Enter the Department name this solicitation is for

Enter name of the person who will be the Contract Administrator and their email address.

Indicate if you have any suggested Vendors. If Yes is selected, additional text boxes will appear for you to enter vendor contact information.
Indicate if this would be intended as a One Time Purchase or Multi-Year Contract. For either selection, an additional selection will appear to enter the Amount of Purchase. Choose a Target Completion Date.

Select if the purchase or contract would be grant funded.

Provide a brief description of the scope of work for this solicitation and any other pertinent information for the Buyer to review.
**Review and Submit**

The final page of the form provides a check to ensure all required fields were completed.

If any of the required fields were not completed, you can use the menu on the left hand side to navigate back to the tab that needs to be fully completed before submission.

Once everything is complete, click Submit.

Select Yes to confirm submission of the form.

Once submitted, the Status of the form changes to “Under Review”. You can view where the form is in the workflow by clicking Form Approvals.
Once approved, you will receive an email from a Procurement Buyer to discuss the next steps of your solicitation. The form will also show in approved Status.

**Additional Resources**

**Selecting Account Codes**

Selecting the right account code is important not only to classify your expenditure, but it can also affect the workflow process that your requisition will route through. Choosing the incorrect account code can lead to longer processing times for your purchases.

For example, using account code 22413 when purchasing a Laser Engraver will route your requisition to Environmental Health and Safety to obtain the proper approvals before the Purchase Order is issued to the vendor.

A complete listing of account codes may be found on the Controller’s Office website: [https://www.controller.vt.edu/accountcodes.html](https://www.controller.vt.edu/accountcodes.html)

There are a few internal vendors who require account code 1244R to be used on requisitions for their services. Any requisition submitted to one of these vendors that does not use account code 1244R will automatically fail. [Click here](https://www.controller.vt.edu/accountcodes.html) to view the listing of Official University Service Centers requiring the 1244R account code.
**Invoices/Credit Memos**

**Credit Memos in HokieMart**

Credit memos cannot be processed in HokieMart. Please send the hard copy/paper credit memo to the Controller's Office (MC 0312) with the applicable PO number written in the upper, right-hand corner.

The Controller's office will process the credit memo and close out the invoice. To have the encumbrance released from a PO with a credit memo applied by AP, please contact [hokiemart@vt.edu](mailto:hokiemart@vt.edu).

**eInvoicing**

There are several suppliers who electronically invoice (eInvoice) the university. There are two options to view eInvoices.

**Option #1**

When the PO number is not known or user wishes to view multiple eInvoices, navigate to Orders → Search → and select Invoices:

![HokieMart Orders Search](image)

Users can then select filters such as date range, supplier, account, fund, etc.

**Option #2**
When the PO number or invoice number is known, the user can search using the Quick Search feature located on the right side of the top menu bar.

If the invoice number is entered in and searched, the user will be taken directly to that e-invoice.

If the PO number is entered in and searched, the user will be taken directly to that PO. Click the **Invoices** tab on the purchase order.

Any invoices belonging to that Purchase order will be displayed on the Invoices tab. Click on the specific Invoice No. to view.
You will then see the invoice and can print or save a PDF copy by selecting the printer icon on the top right hand corner.

Invoice Imaging
Accounts Payable invoices can be viewed directly from Banner. Please review Procedure 21005a: Invoice Imaging for information on how to access Accounts Payable invoice images.

Please note that images are available for accounts payable invoices from July 1, 2007 forward. This does not include e-invoices.
## General Contact Information

**HokieMart**  
Questions concerning HokieMart functions (rejected/pending PR's and PO's), appropriate form usage and procedures, vendor receipt of orders: [HokieMart@vt.edu](mailto:HokieMart@vt.edu)

**Accounts Payable**  
Questions concerning the payment of invoices, encumbrances, expenditures: [acctpay@vt.edu](mailto:acctpay@vt.edu)

**Receiving**  
Questions concerning electronic receiving: Rebecca Goad  
[rg91acct@vt.edu](mailto:rg91acct@vt.edu)

**Banner Reports**  
Questions concerning Banner Finance Reports:  
[genactg@vt.edu](mailto:genactg@vt.edu)

**HokieMart Access**  
Questions concerning updating or adding roles (Receiver, Requestor, Approver) or access to funding: General Accounting  
[genactg@vt.edu](mailto:genactg@vt.edu)
Helpful links/Webistes

Additional HokieMart material and HokieMart User Quick Guides may be found on the Procurement website: https://www.procurement.vt.edu/hokiemart.html

Vendors that do not accept HokieMart POs (please use a P-card):
https://www.procurement.vt.edu/hokiemart/xvendors.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