

Quick Guide - Creating Shared Department Purchase Requisition (11-18-09)

From the Main Screen of HokieMart:

- Choose and click desired form.
- Enter the supplier's name.
- Choose desired supplier from the drop-down menu.
- Add desired item(s) and proceed to the cart.

User will now be in the **Cart – Draft Requisition**



in **Edit Cart** mode.



In the “Prepared for” field in the left-hand corner of the cart:

- <Click “Select a different user.”

Cart Name	2007-09-24 scrunkil 06
Priority	Normal
Accounting Date	<input type="text"/>
	mm/dd/yyyy
Prepared for	Sherry Crunkilton Select a different user...

A “User Search” box will open.

- Type in Shared Department.
- Click “Search.”

User Search	
USER DETAILS	
First Name	<input type="text" value="Shared"/>
Last Name	<input type="text" value="Department"/>
Email	<input type="text"/>
Department	<input type="text"/>
Position	<input type="text"/>
Results per page	10
<input type="button" value="Search"/>	

A Search Results box will open.

Users meeting the search criteria: 1					Page 1 of 1
Select	Name	User Name	Email	Phone	
<input type="radio"/>	Department, Shared	wizard	milong@vt.edu	+1 (540) 231-9308	
<input type="button" value="Choose Selected User"/>					

- Click in the radio button.
- Click “Choose Selected User.”

“Shared Department” will now appear in the “Prepared for” line.

- Click **Save**.
- Proceed to the cart.

Add Non-Catalog Item	
Cart Name	<input type="text" value="2007-09-24 scrunkil 05"/>
Priority	<input type="text" value="Normal"/>
Accounting Date	<input type="text" value="mm/dd/yyyy"/>
Prepared for	Shared Department Select a different user...

- Complete the PR using instructions:
 - Edit the Cart
 - Review the Cart
 - Submit the PR

- Follow the instructions for Requisition and Purchase Order Follow-up.

The PR will be routed to all approvers for review. The PR will require an approval from each department that provided funding.

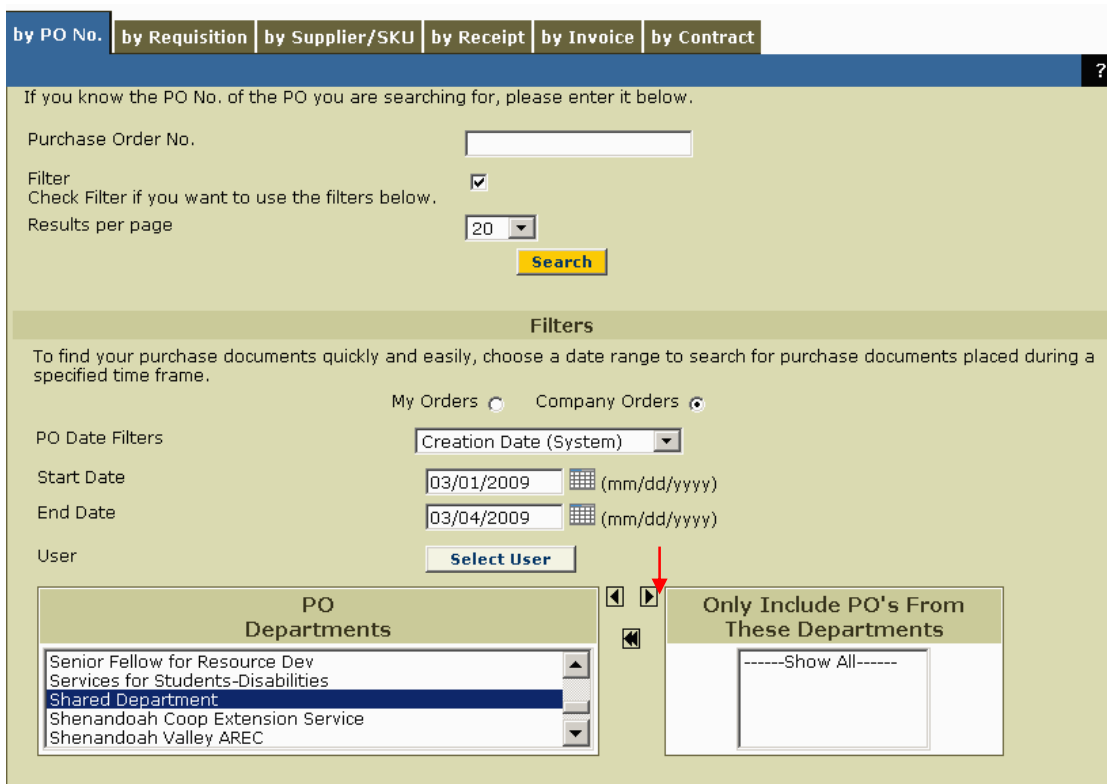
Quick Guide - Searching for “Shared Departments”

From the Main Screen of HokieMart

- Click “history” tab



- Click “by PO No.” tab.
- Click in the “Filter” box
- Click in “Department Orders” (some users may see Company Orders)
- Select a “Start Date” and “End Date” from the calendars
- In the left hand block labeled PO Departments,
- Select “Shared Departments.”
- Select the right hand arrow (➤) to move the Share Departments to the box labeled “Only Include PO’s From These Departments”
- Click “Search.”



The screenshot shows the search interface with the following elements:

- Navigation Bar:** by PO No. | by Requisition | by Supplier/SKU | by Receipt | by Invoice | by Contract
- Search Input:** Purchase Order No. [text box]
- Filter:** Check Filter if you want to use the filters below.
- Results per page:** 20 [dropdown]
- Search Button:** Search
- Filters Section:**
 - My Orders Company Orders
 - PO Date Filters: Creation Date (System) [dropdown]
 - Start Date: 03/01/2009 [calendar icon] (mm/dd/yyyy)
 - End Date: 03/04/2009 [calendar icon] (mm/dd/yyyy)
 - User: Select User [button]
- Department Selection:**
 - PO Departments:** Senior Fellow for Resource Dev, Services for Students-Disabilities, **Shared Department** (highlighted), Shenandoah Coop Extension Service, Shenandoah Valley AREC
 - Only Include PO's From These Departments:** [text box containing "-----Show All-----"]

All Shared Department POs for the university should appear.

By clicking on the appropriate column heading, the PO's can be put either into ascending or descending order, Supplier alphabetical order, Creation Date/Time, PO Total, or Requisition No. This will facilitate locating the PO.

Workflow Status ^	PO No ^	Supplier ^	Creation Date/Time v	PO Total v	Requisition No. ^	Requisitioner ^	Supplier Status	Settlement Status	Select <input type="checkbox"/>
✓	P9097357	Apple Computer Inc	3/4/2009 2:06 PM	2,641.00 USD	10155756	Department, Shared	Sent		<input type="checkbox"/>
✓	P9097325	Tripos DE Inc	3/4/2009 1:43 PM	1,500.00 USD	10101567	Department, Shared	Sent		<input type="checkbox"/>
✓	P9097209	TIAA CREF	3/4/2009 11:17 AM	7,639.84 USD	10170513	Department, Shared			<input type="checkbox"/>
✓	P9097171	nTelos	3/4/2009 10:35 AM	41.00 USD	10165010	Department, Shared			<input type="checkbox"/>
✓	P9097050	Embarq Corporation	3/4/2009 8:13 AM	157.37 USD	10146899	Department, Shared			<input type="checkbox"/>
✓	P9096737	Bug Muggers Pest Control	3/3/2009 1:42 PM	39.13 USD	10149119	Department, Shared	Sent		<input type="checkbox"/>

- Select the desired PO No.
- Click on the “Approvals” tab if you wish to view the status of the PO.

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PO Line No ^	Revision No. ^	Date/Time v	User ^	Step (s)	Action ^	Field Name ^	From	To	Note
	original	3/4/2009 2:09 PM	System		Received PO dispatched status from an external system				
	original	3/4/2009 2:09 PM	System		PO Approvals completed				
	original	3/4/2009 2:09 PM	System		PO Export sent to external system				The PO was successfully distributed to the ERP system.
	original	3/4/2009 2:08 PM	System		PO Sent via CXML				200: success

