

## Home Page

The revised Home Page has been redesigned to enhance search capabilities and easy access to shopping types (non-catalog ordering, Punchout suppliers, hosted catalog suppliers, etc.).

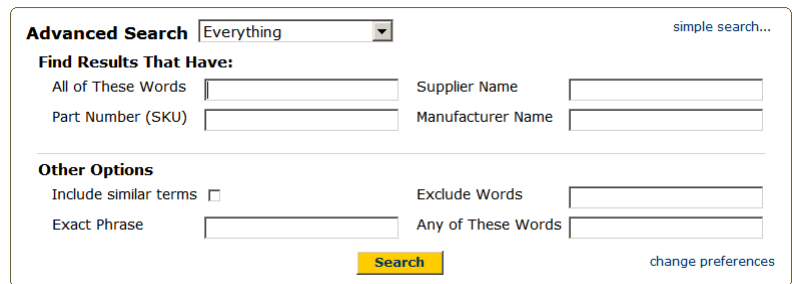
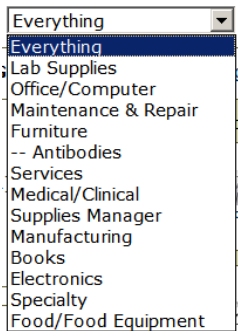
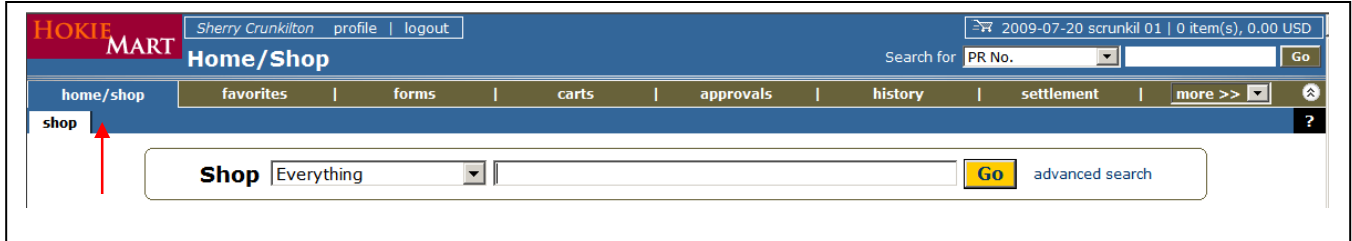
The screenshot displays the HokieMart Home/Shop interface. At the top, there is a navigation bar with the HokieMart logo, user information (Sherry Crunkilton), and a shopping cart icon showing 12 items for 60.00 USD. Below this is a search bar and a menu with options like home/shop, favorites, forms, carts, approvals, history, settlement, and more. A secondary navigation bar includes a 'Shop' dropdown menu and a 'Go' button. The main content area is divided into several sections: 'Action Items' with links to My Orders and Approvals; 'Hosted Catalog Suppliers' featuring logos for ATYMEGEN, BIO-RAD, and USA Scientific; 'University Forms' listing items like Direct Pay and Reimbursement Request; and 'HokieMart Punchout' which is categorized into Lab Supplies (Applied Biosystems, Fisher Scientific, etc.), Office/Computer (Apple, CDWG, Dell, etc.), Maintenance & Repair (Eck, Grainger, etc.), and Furniture.

### My Resources

email: HokieMart@vt.edu phone: +1 (540) 231-2020

Because of the Home Page size, split screens will be used to review the updates.

The “home/shop” tab is a combination of the **Home and Product Search tabs** in the original version.



**The “advanced search” is the same; only the format has been revised.**

All shopping methods and forms are easily accessible and identifiable. **The non-catalog item and quick order have not changed.**

Hosted Catalog Suppliers display directly beneath the simple search. These suppliers have contract pricing or a price agreement which offers institutional discounts on all or part of their product line.



University Forms and Punchout Suppliers are located directly on the Home Page.

**University Forms** | ?

- Direct Pay (HokieMart will not deliver PO)
- Interdepartmental Printing Request (HokieMart will...)
- Interdepartmental Service Request (HokieMart will ...)
- Reimbursement Request (HokieMart will not deliver ...)
- Travel Agency Authorization (HokieMart will delive...)

These forms have not changed.

**HokieMart Punchout** | ?

**Lab Supplies**

- Applied Biosystems
- Fisher Scientific
- QIAGEN
- SIGMA-ALDRICH
- VWR INTERNATIONAL
- IDT
- Invitrogen life technologies

**Office/Computer**

- Apple
- CDWG
- DALY Minority Supplier
- DELL
- OfficeMax
- SUPPLY ROOM COMPANIES
- GuyBrown PRODUCTS
- TIG Technology Integration Group

**Maintenance & Repair**

- ECK
- SE
- GRAINGER
- MSC Industrial Supply Co.

**Furniture**

- 

The Punchouts have not changed.

**Action Items**

- **My Orders**
- Requisitions - Returned (1)
- Requisitions - Pending (3)

Action Items, located on the left-hand side of the Home Page, provide a quick link to recent and completed Carts, Requisitions, and Purchase Orders.

Welcome to the HokieMart UIT instance!

HokieMart (university) Message board is directly below the Action Items.

**My Resources**  
email: HokieMart@vt.edu phone: +1 (540) 231-2020

My Resources is located at the bottom of the screen.

## Search by Fund, Account Code, and Organization

Requestors now have the ability to perform a history search by fund, account code, and organization. The history search can be performed on both a PO and PR.

- Click “history” tab.
- Click either the “by PO No.” or “by Requisition” tab.
- Place a checkmark in the “Filter” box.
- Choose “Results per page” quantity.
- Choose “My Orders” or “Department Orders.”
- Choose “Start Date” and an “End Date.”
- Enter the “Account,” “Fund,” or “OrgWF1” (organization).
- Click “Search.”

by PO No. | by Requisition | by Supplier/SKU | by Receipt | by Invoice | by Contract

If you know the PO No. of the PO you are searching for, please enter it below.

Purchase Order No.

Filter   
Check Filter if you want to use the filters below.

Results per page

**Search**

### Filters

To find your purchase documents quickly and easily, choose a date range to search for purchase documents placed during a specified time frame.

My Orders  Company Orders

PO Date Filters

Start Date  (mm/dd/yyyy)

End Date  (mm/dd/yyyy)

User

Approved By

**PO Departments**

- Administrative Information Systems
- Athletics
- Biochemistry
- Building Repair and Maintenance
- Business

**Only Include PO's From These Departments**

-----Show All-----

### Custom Field Filter

Account   
Select from all values...

Fund   
Select from all values...

↳ OrgWF1

A page will open which displays all PO's or PR's searched for by either "Account," "Fund," or "OrgWF1".

✓	<a href="#">P9088513</a> 	Bio-Rad Laboratories	7/21/2009 10:13 AM	2,303.75 USD	<a href="#">318074</a>	Sutphin, Bonnie
✓	<a href="#">P9088512</a> 	Bio-Rad Laboratories	7/21/2009 10:13 AM	580.06 USD	<a href="#">318073</a>	Sutphin, Bonnie
✓	<a href="#">P9088509</a> 	Bio-Rad Laboratories	7/20/2009 4:52 PM	580.06 USD	<a href="#">317743</a>	Sutphin, Bonnie
✓	<a href="#">P9088505</a> 	Lee Hartman & Sons Inc	7/20/2009 2:51 AM	2,100.00 USD	<a href="#">317650</a>	Sutphin, Bonnie
✓	<a href="#">P9088504</a> 	Alfa Aesar	7/20/2009 2:51 AM	2,380.00 USD	<a href="#">317646</a>	Sutphin, Bonnie

## View Approvers

A **Requestor** will now have the ability to see all available approvers in each step of the workflow. This will allow the Requestor to contact the Approver for various reasons including expediting the requisition.

- Click “Approvals” tab on the PR or PO.
- Click “view approvers.”

**Do not assume that the PO has been delivered to the supplier. Click on “History” tab to verify the delivery.**

The screenshot shows a workflow interface with four tabs: Requisition, Approvals, Comments, and History. The main area displays three steps in a sequence:

- Step 1: Budget Auth** (Status: Approved, System)
- Current Step: Step 2: Org Approval 1** (Status: Active, includes 'view approvers' link)
- Step 3: Create PO** (Status: Future)

A 'Finish' icon is visible at the end of the sequence. A red arrow points from the text above to the 'History' tab in the navigation bar.

All Requestors can view authorized Approvers in any Step of the workflow

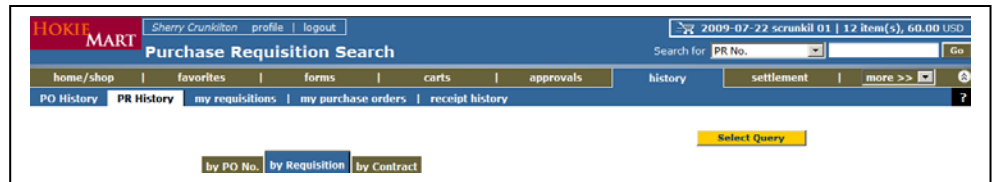
Workflow Step Approvers (Org Approval 1) ? X		
Approver Group : 1		
Bonnie Sutphin	sutphinb@vt.edu	+1 (540) 231-4637
Sherry Crunkilton	scrunkil@vt.edu	+1 (540) 231-3988
Wendell Vest	vest@vt.edu	+1 (540) 231-8582

Close

## Search by Approver

The Requestor can now perform a history search which will provide a list of the PO's approved by individual Approvers.

- Click "history" tab.
- Click "PR History" tab.
- Click "by requisition ."



by PO No. by Requisition by Contract

If you are searching for a specific purchase document, include as many of the items below to narrow your results.

Requisition Name

Requisition No.

Supplier Name

Catalog No. (SKU)

Filter

Check Filter if you want to use the filters below.

Results per page

**Filters**

To find your purchase documents quickly and easily, choose a date range to search for purchase documents placed during a specified time frame.

My Orders  My Submitted Orders  Company Orders  Orders I Reviewed

Start Date  (mm/dd/yyyy)

End Date  (mm/dd/yyyy)

Prepared for

Prepared by

Approved By Vest, Wendell

The same instructions apply to "Prepared for" and "Prepared by."

- Place a checkmark in the "Filter" box.
- Select "Start Date" and "End Date" for the range of the search.
- Select "My Orders" or "Department Orders."
- Click "Select User."

**User Search**

First Name

Last Name

Email

Department

Position

Results per page

- Enter the last name of the Approver.
- Click "Search."

Results per page  Users meeting the search criteria: 1 < Page 1 of 1 >

Select	Name ^	User Name ^	Email ^	Phone
<input type="checkbox"/>	Vest, Wendell	vest	vest@vt.edu	+1 (540) 231-8582

- Click "Choose Selected User."
- Click "Search."

All PR's will be listed for the chosen Approver in the chosen date range.

Results per page <input type="text" value="10"/> Requisition(s) meeting the search criteria: 77 <span style="float: right;">Page <input type="text" value="1"/> of 8 <a href="#">legend</a> <a href="#">?</a></span>					
Status ^	Requisition No. ^	Requisition Name ^	Requisitioner ^	Requisition Date/Time ▼	Requisition Total
✓	319518	2009-07-23 vest 01	Vest, Wendell	7/23/2009 2:12 PM	239.95 US\$
✓	318959	2009-07-22 vest 01	Vest, Wendell	7/22/2009 4:01 PM	1,000.00 US\$
✓	318957	2009-07-22 vest 01	Vest, Wendell	7/22/2009 3:53 PM	1,000.00 US\$
✓	318954	2009-07-22 vest 01	Vest, Wendell	7/22/2009 3:44 PM	239.95 US\$
✓	318815	2009-07-22 vest 01	Vest, Wendell	7/22/2009 1:08 PM	239.95 US\$
✓	318339	2009-07-21 vest 01	Vest, Wendell	7/21/2009 2:06 PM	239.95 US\$
✓	317725	2009-07-20 _sq_jcooley 01	Vest, Wendell	7/20/2009 11:27 AM	404.03 US\$
✓	317724	2009-07-20 _sq_jcooley 01	Vest, Wendell	7/20/2009 11:26 AM	195.01 US\$
✓	317722	2009-07-20 _sq_jcooley 01	Vest, Wendell	7/20/2009 11:25 AM	175.39 US\$
✓	302684	2009-06-01 scrunkil 02	Crunkilton, Sherry	7/17/2009 4:07 PM	9.00 US\$

## Adding Comments to PR or PO

Requestors and Approvers will now have the ability to add comments to the purchase requisition or purchase order. In addition, a comment may be sent to other HokieMart users. 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

“Add Comment” is available in the drop down menu of “Available Actions” on the PR.

To add a comment,

- Select “Add Comment” from the drop down menu.
- Click “Go.”

Available Actions:

The “Add Comment” box will open.

- Add the desired comment.
- Place a checkmark in the email notification(s)
- Click “Add Comment.”

**Email notification(s):**

Sherry Crunkilton (Approver) <scrunkil@vt.edu>  
add email recipient...

Are the funds sufficient in this grant to cover the cost?

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

**Attach file to this document (optional):**

Attachment Type:

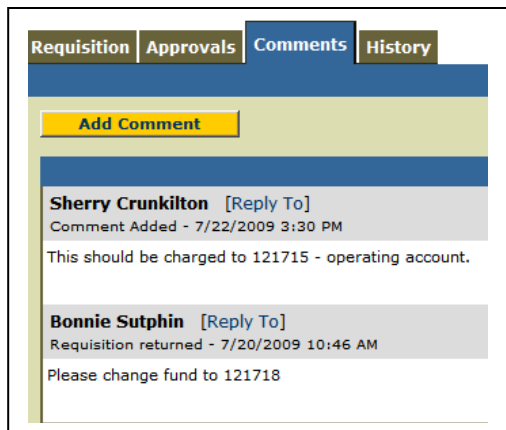
File Name:

File:

**By clicking on “add email recipient” other HokieMart users may receive the email notification.**

**An attachment(s) may also be included in the email. See Instructions below.**

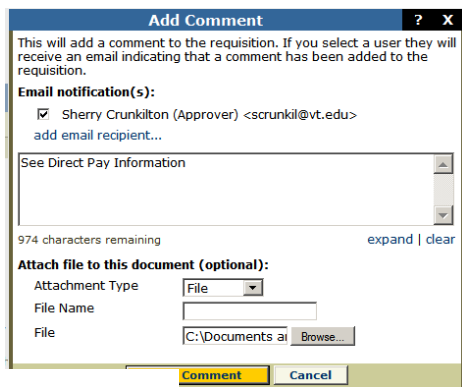
By clicking the “Comments” tab on the PR, the Approver and Requestor may view all comments associated with this PR.



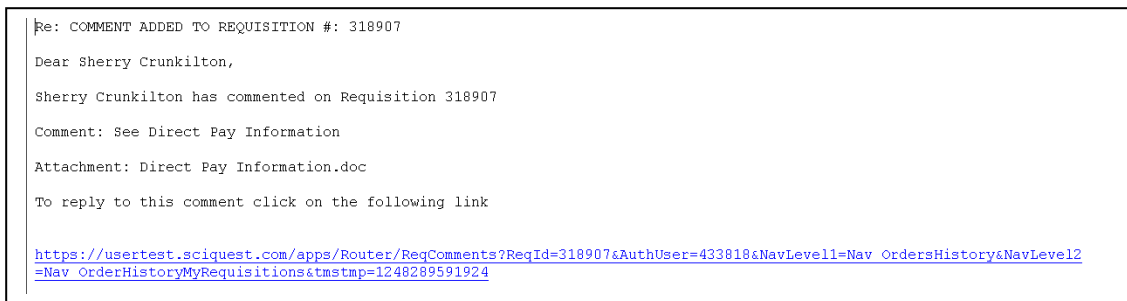
### Adding Documentation

An Approver also has the ability to **add documentation** (Word Files, etc.) when the PR is returned to the Requestor.

- Follow instructions above for adding a Comment.
- Check “Email notification(s).”
- Click “Browse” and attach the desired document.
- Click “Add Comment.”



Requestor and/or other recipients will receive an email.

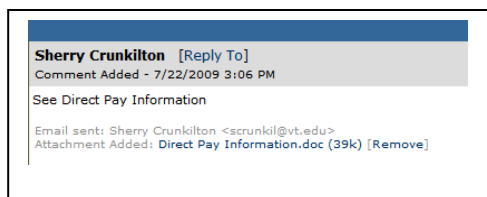


To reply to the comment, click on the URL.

- Click “Comments.
- Click “Add Comment.”

To open the attachment

- Click on the attachment name.



## Return a PR to Requisitioner

An **Approver** (including administrative approvers) will now have the ability to return the PR as a draft cart to the Requestor for any changes/updates that need to be made. This functionality is available **AFTER** the cart has been assigned to the Approver. Returning a PR allows changes without rejecting the PR.

From the drop-down menu:

- Select “Return to Requisitioner.”
- Click “Go.”

Available Actions: Return to Requisitioner Go

The following box will open.

**Return to Requisitioner** ?

Return the requisition to the requisitioner as a draft cart so they can correct errors and resubmit for approval.

Reason for return

Please change fund to 121689.

971 characters remaining expand | clear

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

Return to Requisitioner
Cancel

- Add desired “Reason for return.”
- Click “Return to Requisitioner.”

The Requestor will receive an e-mail notification (Requestor must have “PR Rejected” checked in their Profile.) that the PR has been returned for action.

The “requisition outbox” will now display “Requisition returned.”

Requisition Number ^	Workflow Step ^	My Action ^	Requisition Name ^	Requisitioner ^	Approval Date/Time v	Requisition Total ^
302684 (returned)	Org Approval 1	Requisition returned	2009-06-01 scrunkil 02	Sherry Crunkilton	7/17/2009 3:41 PM	250.00 USD

The Requestor will make the changes as requested by the Approver and resubmit the revised PR for approval.

Requisition
Approvals
Comments
History

If Approver wishes to view the reason for returning the PR:

- Click “History” tab.

7/20/2009 10:46 AM	Bonnie Sutphin	Org Approval 1	Requisition returned	Bonnie Sutphin	Bonnie Sutphin	Please change fund to 121718
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