

The Cart



Changes in the HokieMart from Upgrade Effective November 11, 2007

Approver Outbox

A new feature is available to all approvers to show all approved items. Various searches of approved items can be executed.

Below is an example of where to find the new approver outbox. Click on the “approvals” tab, which presents the screen below. Click on the “Requisition outbox” tab.

The screenshot shows the HokieMart interface. At the top left is the HokieMart logo. To its right, the user name 'Wendell Vest' is displayed with links for 'profile' and 'logout'. Below this is a navigation bar with tabs for 'home', 'my favorites', 'product search', 'carts', and 'approvals'. The 'approvals' tab is selected. Underneath, there are sub-tabs for 'requisition' and 'Requisition outbox', with 'Requisition outbox' being the active one. Below the sub-tabs, there is a '+ Click to filter requisitions' button. Further down, there are links for 'Show requisition details' and 'Assign Substitute'. A section titled '- My PR Approvals' is visible, showing 'Results per page' set to 10 and 'Requisitions Found: 4'. A table header is partially visible with columns: 'Requisition No.', 'State', 'Priority', and 'PR Date/Time'.

After clicking the “Requisition outbox,” the screen below will appear.

The screenshot shows the HokieMart interface for the 'Approvals Requisition Outbox'. At the top, the user name 'Wendell Vest' is shown with 'profile' and 'logout' links. A search bar contains '2007-11-08 vest 01 | 1 Item(s), 14.99 USD'. The navigation bar includes 'home', 'my favorites', 'product search', 'carts', 'approvals', 'history', 'settlement', and 'more >>'. The 'approvals' tab is selected. Below it, sub-tabs for 'requisition' and 'Requisition outbox' are shown, with 'Requisition outbox' active. A '+ Click to filter requisitions' button is present. Below that are links for 'Show requisition details' and 'Requisition Approvals'. A table is displayed with the following data:

Workflow Status	Requisition Number	Step Action	Step Name	Requisition Name	Requisitioner	Approval Date/Time	Requisition Total	
	139705	view	Requisition approved	Org Approval 1	2007-07-19 vest 01	Wendell Vest	11/9/2007 8:28 AM	1,550.00 USD
	139706	view	Requisition approved	Org Approval 1	2007-07-19 vest 01	Wendell Vest	11/9/2007 8:28 AM	200.00 USD

A red arrow points from the 'Click to filter requisitions' button to the first row of the table.

Searches can be done by clicking on the “Click to filter requisitions” which will provide various search options. Requisition details can be seen by clicking on the “show requisition details” which will show vendor name and other detail information.

History Searches on Approved Requisitions

Approvers can perform history searches of approved requisitions by clicking:

- <history” tab
- <PR History”
- <by Requisition”
- <Filter
- <my approved orders

See example below.

HOKIE MART Wendell Vest profile | logout 2007-11
Purchase Requisition Search Search for PR No.

home | my favorites | product search | carts | approvals | **history** | settlement

PO History | **PR History** | my requisitions | my purchase orders | receipt history | search exports

Select Query

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 **Select Supplier**

Catalog No. (SKU)

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 My Submitted Orders Company Orders **My Approved Orders**

Start Date (mm/dd/yyyy)

End Date (mm/dd/yyyy)

My Requisitions and My Purchase Orders Automatically Removed After 90 Days

PRs listed under “My Requisitions” tab and POs listed under “My Purchase Orders” tab will be **automatically removed after 90 days**.

Any PRs and POs still pending approval (denoted by circling blue arrows ) will remain in the under the “My Requisitions” and/or “My Purchase Orders” tab.

A complete listing of all PR and PO transactions will still be available in the HokieMart under the “history” tab by using the Filter (see page 58 of the Requestor Guide).



My Requisitions						legend ?
Status	Requisition No.	Requisition Name	Requisition Date/Time	Requisition Total	Remove Notification	
<input type="checkbox"/>	5532500	2007-11-05 scrunkil 01	11/5/2007 10:27 AM	0.00 USD	Remove	
✓	5464988	2007-10-26 scrunkil 01	10/26/2007 11:00 AM	99.00 USD	Remove	
✓	5464918	2007-10-26 scrunkil 01	10/26/2007 10:40 AM	12.72 USD	Remove	
✓	5449159	2007-10-24 scrunkil 01	10/26/2007 10:29 AM	250.00 USD	Remove	



My Purchase Orders						legend ?
Workflow Status	PO No.	Supplier	Creation Date/Time	PO Total	Remove Notification	
✓	P0849684	The Wall Street Journal	10/26/2007 11:03 AM	99.00 USD	Remove	
✓	P0849657	UPS	10/26/2007 10:55 AM	12.72 USD	Remove	
✓	P0849600	VT Digital Print: Center II	10/26/2007 10:32 AM	250.00 USD	Remove	
✓	P0848089	Harris Office Furniture Company, Inc.	10/23/2007 2:24 PM	346.34 USD	Remove	

Contact Information

- HokieMart -** Questions concerning HokieMart functions (rejected/pending PRs/POs), appropriate form usage and procedures, vendor receipt of orders.
HokieMart@vt.edu, 540-231-2020.
- Accounts Payable -** Questions concerning the payment of invoices, encumbrances, expenditures:
Jeanie Quesenberry at jque@vt.edu, 231-2544
- Receiving -
Invoice Imaging** Questions concerning electronic receiving and invoice images:
Mike Long, milong@vt.edu, 231-9308
- Banner Reports -** Questions concerning Banner Finance reports:
Doug Irvin, irvinda@vt.edu, 231-3381
- Direct Pay -** Questions concerning the use of Direct Pay Form and payment categories:
Donna Nichols, dnichols@vt.edu, 231-8616
- HokieMart Roles** Questions concerning updating/adding HokieMart roles (Requestor, Receiver, Approver, Tina Lawrence, Tinalaw@vt.edu, 231-9260

New Punchout Supplier

Applied Biosystems is now available as a Punchout supplier.

*****Change in FedEx Invoices*****

IMPORTANT: Effective immediately, **ALL FedEx** invoices should be processed on the Direct Pay Form, payment category C1 (freight/express/shipping/common carriers). This change is being made due to an update in state reporting requirements.

Contact Name on POs

A contact name must appear in the “Ship To” address on all POs. Please do **NOT** leave the period in “Ship To.” This is especially important for POs done to Punchout suppliers.

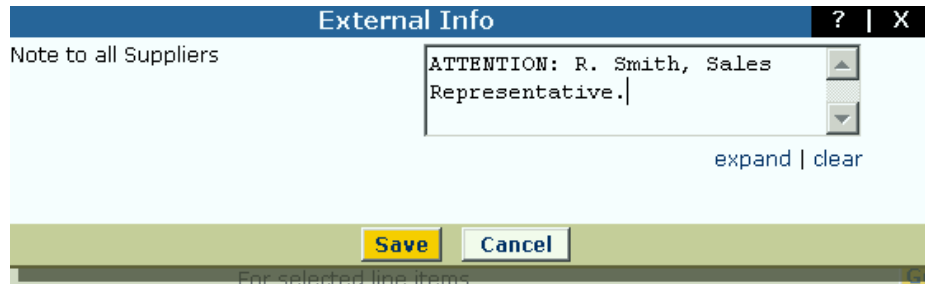
Ship To

→ Contact Name Sherry Crunkilton
Phone +1 (540) 231-3988
Email scrunkil@vt.edu
Purchasing
270 Southgate Center
Blacksburg, VA 24061
United States

Please refer to Navigation and Profile Guide to permanently change the period to your name.

“Attention” Information for Suppliers

When adding a new supplier, Purchasing will does not add an Attention line (see below) This should be added by the Requestor in the External Notes which will be seen by the supplier.



The screenshot shows a software window titled "External Info" with a blue header bar containing a question mark and a close button (X). The main area is light blue and contains the text "Note to all Suppliers" on the left and a text input field on the right. The input field contains the text "ATTENTION: R. Smith, Sales Representative." with a cursor at the end. Below the input field are "expand" and "clear" links. At the bottom of the window, there are "Save" and "Cancel" buttons. A small "Go" button is visible in the bottom right corner. The text "For selected line items" is partially visible at the very bottom of the window.

HokieMart Classes

HokieMart classes will continue to be held twice each month. The schedule is posted on the Purchasing website: www.purch.vt.edu. These classes are for new users and those who wish a refresher course.

How to Change Fund Codes

To change a fund code after a PO has been completed, choose one of three options depending on the process stage of the PO.

- (1) To change the fund number if the Receiver **has the invoice in hand**, write: **“Change Fund Number”** on the face of the invoice near the PO number and highlight the fund number. The Controller’s Office will update the fund number on the Banner invoice form.
- (2) To change the fund number **BEFORE processing an electronic receipt**, Receiver can put a note in the Delivery Notes of the receipt requesting the change. The Controller’s Office will update the fund number and mail to the Controller’s Office.
- (3) To change the fund number **AFTER processing the electronic receipt**, user will need to complete a Journal Entry and mail to the Controller’s Office.

Inter-Agency Transfers

When processing POs to other state agencies, use the Direct Pay Form with the payment category of A6.

Accounting Date Field Removed from Cart and Requisition

The accounting date has been removed from the cart and requisition. This field will be placed back on these forms starting in April and ending in June so that purchase orders can be posted to the new fiscal year. The removal of this field will prevent requestors from populating this field on routine orders which results in transactions being rejected at month end when the Banner Finance accounting period is closed.

Invoice Images Available To Departments (provided by the Controller's Office)

The Controller's Office is pleased to announce that the invoice viewer system is now ready for departments to access. All invoices, payment documents, and supporting documentation, except for travel reimbursements, received in the Controller's Office since July 1, 2007 have been scanned and are available for viewing using the new invoice viewer.

The invoice viewer is located on HokieSpa. To access HokieSpa go to:

https://banweb.banner.vt.edu/ssb/prod/twbkwbis.P_WWWLogin

Login using your PID and password. The invoice viewer is located at the bottom of the main menu in HokieSpa.

You will be able to view scanned images of invoices by either entering a PO# or the Banner invoice number.

Invoices and payment documents are scanned daily in the Controller's Office after entry into Banner. Normally the invoice image is available two business days after it is entered in Banner. Please note that this is not a reporting system. The invoice viewer is only intended to provide departments with a scanned image of an invoice and should not be used to replace monthly reports or reconciliations.

Booking Airline Tickets Through a Travel Agency (provided by the Controller's Office; pertinent HokieMart information in red)

At the time of booking (prior to preparing the TAA in HokieMart), please verify each detail of the itinerary for accuracy. Make certain that the name on the reservation matches the traveler's driver's license or passport. Do not make the reservation for "Chris Traveler" if the driver's license lists the name as Christopher, Christian, or Christine Traveler. Passengers are often denied boarding if the name does not match the I.D. Please make sure the dates, the times, and the destinations are correct. In the Product Description portion of the TAA, you may use "as per attached itinerary;" scan the itinerary, and attach it as an External Attachment to the PO.

The majority of airline tickets are non-refundable after they have been issued and fees apply for any changes. There is a 24-hour window to void tickets after issuance. At this point, travel agencies are at the mercy of the airlines. Even though some travel agencies do not charge a fee, they must collect fees charged by the airlines. Fees can range from a minimum of \$75.00 to hundreds of dollars. Travel agencies want to avoid passing along these fees to Virginia Tech.

Travel agencies should be emailing proposed reservations to the traveler and/or the travel planner for approval **prior** to ticketing. List the requested individual and an email/phone number of the individual who would like to receive the confirmation in External Notes. If there is anything that is not accurate, the travel agencies have the opportunity make a correction before the ticket is issued. Even after the ticket is issued, travel agencies have a 24-hour grace period to void the ticket. At that point in time, the airlines will do very little to help travel agencies; and, therefore, the agencies have limited options.

Important Reminders

Users continue to have questions about electronic receiving in HokieMart. Hopefully, this table will simplify the process.

<u>Form</u>	<u>Receipt Action</u>
Punchout/Hosted Catalog Forms	Receiving Needed
Contract Payment/Purchases Forms	Receiving Needed
Non-Catalog Form	Receiving Needed
Direct Pay	Receiving Needed
<u>Prepayments</u> on any HokieMart Form	Receiving <u>NOT</u> Needed
IPRs and ISRs	Receiving <u>NOT</u> Needed
Reimbursement Request	Receiving <u>NOT</u> Needed
Travel Agency Authorization	Receiving <u>NOT</u> Needed

IPR Template

Please be sure that the **IPR Work Request** template is completed and **attached to the IPR** along with any necessary documents. These documents **must** be attached as **External Attachments** either in the form or in the cart.

The screenshot shows a form interface with a light blue background. At the top, there is a dark green header bar with the text "External Info" and a question mark icon on the right. Below the header, the form is divided into two main sections. The left section is titled "External Attachments" and contains two links: "Requestor Guide 08-16-07.doc (2,714k)" and "IPR.doc (77k)". The right section is titled "External Info" and contains the text: "Fill out the IPR Work Request template ([click here to download template](#)) and attach it to this form. This will include department, building/room, contact name, phone, service by date and the request specifications." Two red arrows point to the "External Info" header and the "Requestor Guide" link.

See IPR Quick Guide, page 71 of the Requestor Guide, for detailed instructions.

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

Newsletter Suggestions

We are interested in having your input and suggestions for future issues. Please send an email to HokieMart@vt.edu.

