

# The Cart



Volume 07-7  
December 21, 2007

Purchasing Department

<http://www.purch.vt.edu>

## Number 1 Most Frequently Asked Question

### Why did my PR/PO fail?

- (1) Search for either the **PR** or the **PO** number.
- (2) Click on the History tab

2007-12-10 scrunkil 03 | 30 item(s), 2,870.00 USD  
Search for PR No. 5797229 Go

2007-12-10 scrunkil 03 | 30 item(s), 2,870.00 USD  
Search for PO No. P0866771 Go

Requisition Approvals **History** Summary Shipping Billing Funding Supplier Info

**Error Message Will Display**

| Line No | Date/Time          | User   | Step(s)     | Action                         | Field Name | From | To | Notes  |
|---------|--------------------|--------|-------------|--------------------------------|------------|------|----|--|
|         | 12/7/2007 10:09 PM | System | Budget Auth | Requisition rejected           |            |      |    |  |
| Line 1  | 12/7/2007 10:09 PM | System | Budget Auth | Requisition Line item rejected |            |      |    | Item 1, Sequence 1: Insufficient budget for item 1,sequence 1, suspending transaction. |

| Error Message  | Definition  | Solution   |
|--|---|--|
| Insufficient budget for item .....   | There are insufficient funds available in the ORG   | Check with your department fiscal/budget manager. Copy the cart, change the funding, resubmit the PR.  |
| Accounting Record Errors for sequence 1<br>*ERROR* Transaction<br><br>Date .... Is not an open accounting period for Chart U | Accounting date field was used  | PR must be redone. Orders can no longer populate the accounting date. It will be reactivated next April. <b>Do not copy the cart because the original accounting date will still be in the old cart.</b> |
| ERROR* User JSMITH Does not have authority to post to fund or org  | User does not have access in Banner to charge PR to fund or org code<br><br>See Appendix 5 in the Requestor Guide for additional error messages | On-Behalf-of Requestor must enter "prepared for user. Requestor should contact Controller's Office to research/request Banner access to the org.   |

## Adding Items to an Existing Cart

### Non-Catalog Item ONLY

To add items to an existing active cart in the Non-Catalog Item:  
click “Add non-catalog item for this supplier.”

For selected line items: Add To Favorites

Taylor Office Supply Inc SBE [more info...](#)  
Order Address 2 PO Number To Be Assigned  
118 3rd & Grove Ave, Radford, VA 24141 US

Add non-catalog item for this supplier...

| Product Description                                   | Catalog No | Size / Packaging | Unit Price | Quantity                          | Ext. Price       | <input type="checkbox"/> |
|---|------------|------------------|------------|-----------------------------------|------------------|--------------------------|
| 1 3-ring binders (black) <a href="#">more info...</a> |            | EA               | 6.75       | <input type="text" value="4"/> EA | 27.00            | <input type="checkbox"/> |
| <b>Supplier subtotal</b>                              |            |                  |            |                                   | <b>27.00 USD</b> |                          |

A blank non-catalog item screen will reopen.

Add Non-Catalog Item

Taylor Office Supply Inc SBE [change...](#)  
118 3rd & Grove Ave, Radford, VA 24141 US  
[+ Show distribution methods](#)

| Product Description  | Catalog No.          | Quantity             | Price Estimate       | Packaging |
|----------------------|----------------------|----------------------|----------------------|-----------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | EA - Each |

255 characters remaining [expand](#) | [clear](#)  
[- Hide product details](#)

Add an additional item(s).

Non Catalog Item

Taylor Office Supply Inc SBE [change...](#)  
118 3rd & Grove Ave, Radford, VA 24141 US  
[+ Show distribution methods](#)

| Description | Catalog No.          | Quantity                       | Price Estimate                    | Packaging |
|-------------|----------------------|--------------------------------|-----------------------------------|-----------|
| Copy Paper  | <input type="text"/> | <input type="text" value="3"/> | <input type="text" value="4.65"/> | RM - Ream |

245 characters remaining [expand](#) | [clear](#)  
[- Hide product details](#)

Click “Save and Close”  
**OR** “Save and Add Another” (to add multiple items)

Taylor Office Supply Inc SBE [more info...](#)  
Order Address 2 PO Number To Be Assigned  
118 3rd & Grove Ave, Radford, VA 24141 US

Add non-catalog item for this supplier...

| Product Description                                   | Catalog No | Size / Packaging | Unit Price | Quantity                          | Ext. Price       | <input type="checkbox"/> |
|---|------------|------------------|------------|-----------------------------------|------------------|--------------------------|
| 1 3-ring binders (black) <a href="#">more info...</a> |            | EA               | 6.75       | <input type="text" value="4"/> EA | 27.00            | <input type="checkbox"/> |
| 2 Copy Paper <a href="#">more info...</a>             |            | RM               | 4.65       | <input type="text" value="3"/> RM | 13.95            | <input type="checkbox"/> |
| <b>Supplier subtotal</b>                              |            |                  |            |                                   | <b>40.95 USD</b> |                          |

The additional item(s) will now be in the active cart.

## All Other Forms

To add items to an existing active cart in **all other** HokieMart forms: click on the **icon** immediately following a line item description.

| OfficeMax Inc <a href="#">more info...</a>                   |            | PO Number        |            | To Be Assigned |                  |
|--|------------|------------------|------------|----------------|------------------|
| Order Address 2<br>5201 Fordwick Dr Sw, Roanoke, VA 24018 US |            |                  |            |                |                  |
| <a href="#">Add non-catalog item for this supplier...</a>    |            |                  |            |                |                  |
| Product Description  | Catalog No | Size / Packaging | Unit Price | Quantity       | Ext. Price       |
| 1 Manilla File Folders <a href="#">more info...</a>          | CP         | BX               | 12.50      | 3 BX           | 37.50            |
| <b>Supplier subtotal</b>                                     |            |                  |            |                | <b>37.50 USD</b> |

The form will reopen.

**General Info** ?

**Non-Configurable Fields**

General Info Instructions  
Use this form to process payments against university contracts that are not Hokie Mart suppliers. These are preferred sources and should be used for departmental small dollar purchases before alternate sources are considered. See website for university contracts: [Virginia Tech Contracts](#)

**Form Type**  
Contract Payment/Purchases (HokieMart will not deliver PO)

**Catalog No.**

**Product Description**  

Manilla File Folders

  
235 characters remaining expand | clear

**Quantity**

**Packaging**

**Estimated Price**

Highlight and delete existing information.

Update Quantity, Packaging, Estimated Price

**Highlight and delete** information in Product Description box.  
Update Product Description, Quantity, Packaging, and Estimated Price.

**General Info** ?

**Non-Configurable Fields**

General Info Instructions  
Use this form to process payments against university contracts that are not Hokie Mart suppliers. These are preferred sources and should be used for departmental small dollar purchases before alternate sources are considered. See website for university contracts: [Virginia Tech Contracts](#)

**Form Type**  
Contract Payment/Purchases (HokieMart will not deliver PO)

**Catalog No.**

**Product Description**  

Pen refills

  
244 characters remaining expand | clear

**Quantity**

**Packaging**

**Estimated Price**

New Item

Click “Add and go to cart.”  
The additional item(s) will now be in the active cart

| OfficeMax Inc <a href="#">more info...</a>                   |            | PO Number        |            | To Be Assigned |                  |
|--|------------|------------------|------------|----------------|------------------|
| Order Address 2<br>5201 Fordwick Dr Sw, Roanoke, VA 24018 US |            |                  |            |                |                  |
| <a href="#">Add non-catalog item for this supplier...</a>    |            |                  |            |                |                  |
| Product Description  | Catalog No | Size / Packaging | Unit Price | Quantity       | Ext. Price       |
| 1 Manilla File Folders <a href="#">more info...</a>          | CP         | BX               | 12.50      | 3 BX           | 37.50            |
| 2 Pen refills <a href="#">more info...</a>                   | CP         | PK               | 5.25       | 4 PK           | 21.00            |
| <b>Supplier subtotal</b>                                     |            |                  |            |                | <b>58.50 USD</b> |

## Correcting Popup Blocker in Invoice Imaging

To view Invoice Imaging ([https://banweb.banner.vt.edu/ssb/prod/twbkwbis.P\\_WWWLogin](https://banweb.banner.vt.edu/ssb/prod/twbkwbis.P_WWWLogin)), you need to allow popups for banweb.banner.vt.edu. If you need assistance, please contact Mike Long (231-9308) ([milong@vt.edu](mailto:milong@vt.edu)) or the Information Technology individual in your department.

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## Adding/Updating HokieMart Roles

Please submit the HokieMart Access Request form found on the Purchasing Office website ([www.purch.vt.edu](http://www.purch.vt.edu)).

Click on HokieMart in the left hand column.

Click on HokieMart Forms.

Click on HokieMart Access Request Form – Departmental Functions.

Complete the form and send it to the Controller's Office (0312).

Please indicate on the form if you are requesting that the employee be added or deleted. Please supply all of the information requested on the form for each employee.

HokieMart Role questions concerning updating/adding HokieMart Roles (Requestor, Receiver, Approver) should temporarily be directed to Doug Irvin (231-3381) or Stacy King (231-8624).

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## Fractions in HokieMart

The use of fractions is not possible in HokieMart (1.5 hours, 2.75 tons, etc.)

## Office Depot

HokieMart purchase orders may now be processed to Office Depot.

## **PROCEDURE FOR PROCESSING **CONFIRMING** PURCHASE ORDERS OVER \$2,000**

December 3, 2007

### **Department Responsibility**

1. Process a purchase requisition (PR) in HokieMart
2. Provide an explanation for processing a confirming transaction (internal attachment)
3. Attach a copy of the invoice (internal attachment) for purchasing department review
4. Hold the invoice until the purchase order(PO) is processed by Purchasing (department will receive a department copy of the PO)
5. Upon receipt of the PO copy, department should electronically receive the items in HokieMart.
6. After receiving, the PO number should be placed on the invoice and forwarded to Accounts Payable for processing

## **PROCEDURE FOR PROCESSING **ADVANCED** PAYMENT PURCHASE ORDERS OVER \$2,000**

### **Department Responsibility**

1. Process a PR in HokieMart

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### **Improve Prompt Pay for Your Department** (The Ledger)

The Controller's Office has noticed that receiving reports are not being completed on a timely basis in the HokieMart for a large number of invoices received for payment. It is very time consuming and labor intensive for the Accounts Payable staff to have to prompt departmental employees to perform the receiving function prior to the payment of the invoice. Please complete the receiving report upon receipt of the goods or services so that invoices can be paid timely. This is especially important if your department has decentralized the ordering and physical receiving of goods and services to many individuals throughout your department, but the receiving reports are entered into HokieMart by just several staff in the departmental office. If you are such a requestor of goods, please remember to notify the central staff as soon as you receive the goods or services.

Departmental employees can review the receiving status on all purchase orders in the HokieMart by performing a history query. To perform a purchase order history query, click on the "history" tab, PO History, by PO No., click in the filter box to place a check mark, select the desired time period by changing the beginning and ending dates, select the desired department, and then click the search button. Review the "settlement status" column on the report to determine if the receiving report is complete.

Also, for invoices that are received directly by the department, please ensure that they are sent to the Controller's Office 10 business days prior to the due date to ensure that the Accounts Payable staff have enough time to enter the invoice prior to the due date.

## Account Codes for Administrative Approval

Please remember to use these account codes to route purchases that require approvals by Communications Network Services (CNS) and Environmental Health and Safety Services (EHSS). If these codes are not used, the purchasing process time will increase.

### Contractual Services

12156 Printing Services – Private Vendors (Printing Approval) - Include expenses for designing, printing, collating, and binding services received from a private vendor.

### Supplies, Materials, & Equipment Costing Less Than \$2,000 Per Item

13415 Radioactive Supplies (EHSS Approval) – Include expenses for radioactive supplies.

22316 Electronic Equipment (CNS Approval) – Include expenses for two-way radios costing less than \$2,000 per unit.

22336 Voice and Data Transmission Equipment (CNS Approval) - Include expenses for telephone equipment costing less than \$2,000 per unit.

22416 Laboratory Equipment (EHSS Approval) – Include expenses for refrigerators, freezers, fume hoods, biological safety cabinets, radiation survey instruments, and lasers costing less than \$2,000 per unit.

22426 Medical and Dental Equipment (EHSS Approval) – Include expenses for x-ray equipment and respirators costing less than \$2,000 per unit.

22536 Construction Equipment (EHSS Approval) – Include expenses for scaffolding costing less than \$2,000 per unit.

22546 Motor Vehicle Equipment (EHSS Approval) – Includes expenses for forklifts, powered pallet jacks, pallet trucks, and ridger fork trucks costing less than \$2,000 per unit.

22736 Manufacturing Equipment (EHSS Approval) – Include expenses for aerial lifts and mechanical power presses costing less than \$2,000 per unit.

### Capitalized Equipment

22311 Electronic Equipment (CNS Approval) – Include expenses for two-way radio costing \$2,000 or more per unit.

22331 Voice and Data Transmission Equipment (CNS Approval) – Includes expenses for telephone equipment costing \$2,000 or more per unit.

22411 Laboratory Equipment (EHSS Approval) – Include expenses for refrigerators, freezers, fume hoods, biological safety cabinets, radiation survey instruments, and lasers costing \$2,000 or more per unit.

22421 Medical and Dental Equipment (EHSS Approval) – Include expenses for x-ray equipment and respirators costing \$2,000 or more per unit.

- 22531 Construction Equipment (EHSS Approval) – Include expenses for scaffolding costing \$2,000 or more per unit.
- 22541 Motor Vehicle Equipment (EHSS Approval) – Include expenses for forklifts powered pallet jacks, pallet trucks, and ridger fork trucks costing \$2,000 or more per unit.
- 22731 Manufacturing Equipment (EHSS Approval) – Include expenses for aerial lifts and mechanical power presses costing \$2,000 or more per unit.

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### **Newsletter and Other HokieMart Suggestions**

We are interested in having your input and suggestions for future issues. Please send an email to [HokieMart@vt.edu](mailto:HokieMart@vt.edu). If you have any other suggestions for HokieMart issues (new/refresher classes, changes/updates to the HokieMart Guides, etc.), please send those as well.

