

The Cart



Volume 08-5
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Purchasing Department

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

PLEASE READ THESE IMPORTANT CHANGES FOR CANCELLING AND CHANGING PURCHASE ORDERS AND REMOVING ENCUMBRANCES

CANCELLING ITEM(S) ON PURCHASE ORDERS

- Create a cancelled receipt in HokieMart for all cancelled item(s). **Add a statement in the receipt notes with the reason for the cancellation.**
- If HokieMart cancellation is done correctly, **no further action is required.** Notice of cancelled receipt will automatically be sent to the Purchasing Department (i.e., **DO NOT email HokieMart to cancel the PO.**)
- A cancelled receipt must now be processed for all purchase orders including, **ISRs, IPRs, TAAs, Reimbursements, and Direct Pays.**

CHANGING ITEM(S) ON PURCHASE ORDERS

If the PO was created by the Purchasing Department (PO over \$2,000 processed on a Non-Catalog item form) a **Request for Purchase Order Change** form is required to:

- increase or decrease item quantity
- add a new item(s) to the PO
- change unit price

REMOVING OUTSTANDING ENCUMBRANCES AFTER PAYMENT IS PROCESSED

Continue to send an email to HokieMart@vt.edu when an outstanding encumbrance needs to be removed from a purchase order (i.e., item invoiced is less than PO).

We strongly encourage the department to run a monthly encumbrance report to verify their outstanding encumbrances.

Updates from Wendell Vest, Associate Controller

Please do not send a copy of the HokieMart PO to the Controller's Office for an ISR or an IPR. A cancelled receipt can be completed in HokieMart which results in the Purchasing Department canceling the related Banner PO.

Invoices, other than **prepayments**, must be forwarded to Accounts Payable. All invoices should reference the PO number. Attaching invoices to a HokieMart form does not prompt Accounts Payable to pay the invoice.

All invoices should be date stamped when received.

Accounts Payable cannot pay an invoice from packing slips, order acknowledgements, quotes, or account statements.

Cancelled receipts should be entered in the HokieMart to cancel a PO in Banner. The Purchasing Department is notified of cancelled HokieMart receipts and initiates a Banner PO cancellation or change order.

New Punchout Vendors

- A Punchout catalog for Integrated DNA Technologies (IDT) has been activated in the HokieMart. Please discontinue using other purchasing processes (Non-Catalog orders or P-cards) and place orders via their on-line HokieMart catalog. The contract number for IDT is TG-005-08.
- The Eck Supply Punchout catalog has also been added to the HokieMart. Eck Supply provides an extensive line of electrical materials and supplies. Eck has a local store and warehouse located in the Blacksburg industrial park and will make rapid delivery of ordered products. **ECK can support only the Internet Explorer browser.** Their contract number is UCP-TG-029-04.

Both new vendors are contract suppliers and offer discounted prices on their entire product line.

!!! External Notes and Attachments to Punchout Vendors !!!

REMEMBER that HokieMart Punchout vendors **cannot view External Notes or External Attachments**. These POs are transmitted via CXML (computer-to-computer). If users wish to include notes/attachments for the vendor (including special shipping instructions such as "no dock available," "lift truck required," "ship overnight") use the Contract Payment Purchases form and place the notes/attachments in the External Note and/or External Attachment section.

Interdepartmental Service Requests

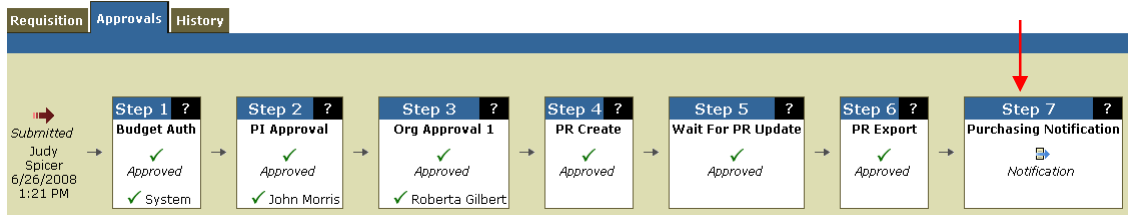
ALL ISRs for university internal departments must be processed on the ISR form. **DO NOT use the Non-Catalog Item form.** If a user tries to process an ISR on the Non-Catalog Item form, they will receive the error message below and will not be able to process an ISR on this form.

Supplier Search	
Supplier Name	vt air*
Results per page	20
<input type="button" value="Search"/> <input type="button" value="Cancel"/>	

Suppliers found: 1	
Results per page	20
<input type="button" value="Page 1 of 1"/>	
Supplier Name/Address	Select
VT Air Transportation Services This supplier does not permit non-catalog item requests.	<input type="button" value="Select"/>

Verifying the Status of a PR That Exceeds \$2,000

When a PR exceeds the \$2,000 limit on the Non-Catalog Item form, the PR will automatically be sent to the Purchasing Department.



An External Req #, always beginning with an “R” (ex. R0005942), will be assigned to the PR.

General	
Status	✓ Completed (7/31/2008 11:04 AM)
Submitted	7/29/2008 6:23 PM
Cart Name	2008-07-29 thosbell 01
Priority	Normal
Prepared by	Thomas Bell
Prepared for	Paul Deck
External Req #	R0005942

If you wish to know the status of this PR, please phone Nancy Luz at 540-231-6221 or email nluz@vt.edu.

Requisition and Purchase Order Follow-up

A continuing problem for users is follow-up on both PRs and POs. The user is responsible for this follow-up. **Please do not assume that the PR became a PO or that the PO was distributed to the vendor.**

PR Follow-up

From the Main Screen of HokieMart

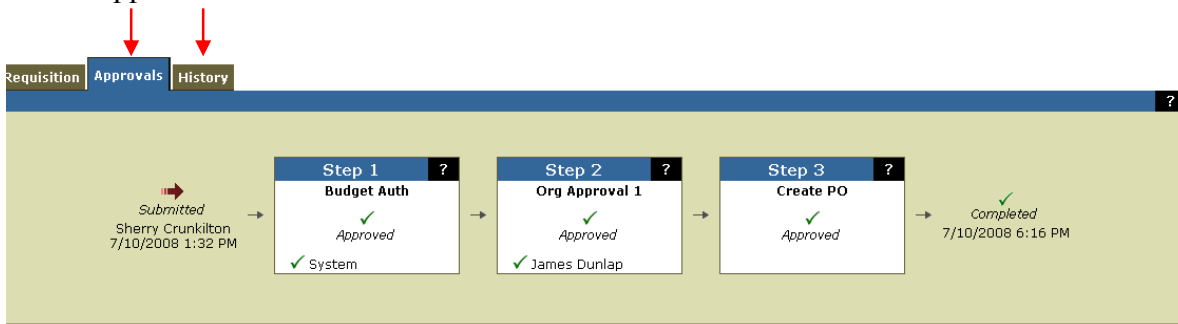
< Select PR No. from drop-down menu in the upper right-hand corner.

< Enter the PR No.

< Click Go.

PR will be displayed.

< Click Approvals tab to follow the status of the PR.



A √ will appear in each workflow step as it is completed.

After completion, the PO No. (P9XXXXXX) will appear on the PR under “Supplier/Line Item Details.”

If a HokieMart **PO has not been assigned**,

< Click on the PR History tab (above) to view any error messages (example below).

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	12/21/2007 11:42 AM	System	Budget Auth	Requisition rejected				
Line 1	12/21/2007 11:42 AM	System	Budget Auth	Requisition Line item rejected				Item 1, Sequence 1: *ERROR* User SCRUNKIL has no authority to post to fund and organization in ch... more...
	12/21/2007 11:42 AM	Sherry Crunkilton		Requisition submitted				

PO Follow-up

From the Main Screen of HokieMart

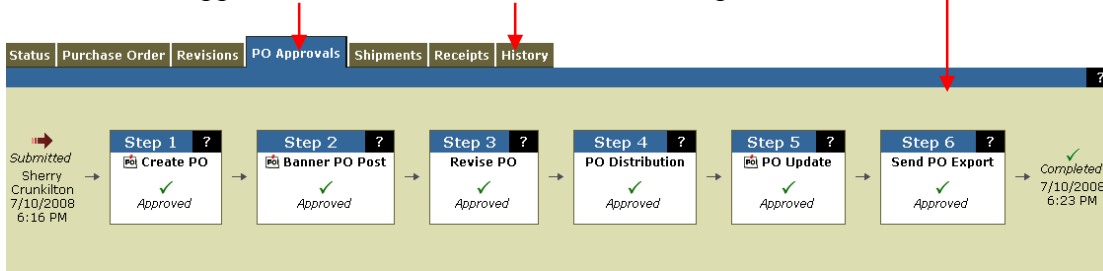
< Select PO No. from drop-down menu in the upper right-hand corner.

< Enter the PO No.

< Click Go.

PO will be displayed.

< Click on PO Approvals tab to confirm that the PO completed the work flow



< Click on History tab to verify that the order was sent to the vendor.

The **three methods of delivery** are:

COMPUTER-TO-COMPUTER

original	9/22/2008 11:19 AM	System	PO Sent via CXML
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This PO was delivered via **CXML (computer-to-computer) on September 22, 2008 at 11:19 AM.**

FAX

original	9/10/2008 11:10 AM	System	Delivery Notification	Delivered to: +1 (804) 378-6210 Date and time of delivery: Sep 10, 2008 11:10:49 AM Number of pages ... more...
original	9/10/2008 11:06 AM	System	PO Sent via fax	Out for fax delivery to +1 (804) 378-6210

EMAIL

PO Sent via HTML attached email	dpc2@exchange.vt.edu
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If you do not receive either of these three delivery options, contact the HokieMart helpline (540-231-2020) or the HokieMart help desk (hokiemart@vt.edu).

!!! Purchase Orders to Best Buy !!!

Users can no longer purchase from Best Buy.gov or Best Buy.com. These vendors will not accept a HokieMart purchase order.

!!! Purchase Orders to Kroger !!!

We have been notified by Kroger that they have restructured their accounting/remittance offices which is impacting the names and addresses that should be used in HokieMart. From this point forward, when processing a **Kroger** payment in HokieMart select **Kroger Limited Partnership 1** as the supplier and select the appropriate address:

For **pharmacy** orders select address OR-4 or OR-5 in Roanoke.

For **customer charges (store receipts)** select address OR-6 in Pittsburgh.

Use of Fractions in HokieMart

The use of fractions in the Quantity field in HokieMart is not possible (1.5 hours, 3.75 lbs., etc.). When completing the Product Description, provide the detailed information (1.5@ \$35.00 per hour) and use “Lot” for Packaging..

Product Description	Catalog No.	Quantity	Price Estimate	Packaging
Interpreter fees September 2. hours @ \$35.00 per hour 197 characters remaining expand clear - Hide product details		1	52.50	LO

Save and Close Save and Add Another Close

Departmental Faxing of POs

When a department chooses to fax a PO themselves,

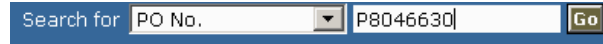
From the Main Screen of HokieMart

< Select PO No. from drop-down menu in the upper right-hand corner.

< Enter the PO No.

< Click Go.

PO will be displayed.



< Choose from the Available Actions drop-down menu “Print Fax Version.”

< Click Go.



The user can now view and print the official university PO which can be faxed to the vendor.

Reminders

Use of VT Foundation Funds for a Travel Agency Authorization

As you know VT Foundation funds cannot be used in HokieMart. If a department wishes to process a Travel Agency Authorization using Foundation funds, process the order on the old Air Travel Authorization form. This form can be found at www.vtf.vt.edu website.

UPS Invoices

UPS invoices should be processed on the [Contract Payment Purchases](#) form (HokieMart **will not deliver**). The contract number for UPS is 910-26-60.

The Cart

We are interested in having your input and suggestions for The Cart and other HokieMart issues. Please email scrunkil@vt.edu with your suggestions. We are currently updating the User Guides. Please let us have your input/suggestions for the manuals.

The Cart is distributed on an “as needed” basis.