



**Virginia Tech
Electronic Business System**

Frequently Asked Questions

September 15, 2006
(Revised)



Frequently Asked Questions (FAQs)

APPROVERS/RECEIVERS/REQUESTORS

Can a department have more than one Approver?

Yes. Generally, each department should have more than one Approver assigned so that backup personnel are available.

Can an individual be a Requestor and an Approver?

Yes, but an Approver cannot be a Receiver.

ATTACHMENTS

Registration Forms – Should these be scanned and attached?

There is no requirement to scan documents and attach to the PR in HokieMart. This is a decision that should be made by the department. The department will be required to send the paper vendor invoice/remittance form to the Controller's office with HokieMart PO number written in the upper right corner.

Is the sole source justification form still required?

Yes. The form is available on the Purchasing website and should be attached to the purchase requisition.

CARTS

If mixed vendors have been used, how are they moved or removed (deleted) from a cart?

Check items to be moved or removed (deleted).

Go to:

- Carts
- Active Carts
- At right side of (next to Go), click on the drop down arrow
- Choose "Move to another draft cart" or "Remove selected items"
- Click "Go"

The order will be moved into a different cart or remove items from your cart.

How is a PR saved to "My Favorites?"

See the Requestor training manual section entitled "My Favorites."

FORMS

What form is used for membership fees?

Direct Pay

What form is used for dues and subscriptions?

Direct Pay

What form is used in HokieMart to order from Virginia Correctional Enterprises (VCE)?

Non-catalog form. In the future, we plan to have VCE as a Punchout catalog supplier.

What form is used for blanket POs?

Contract Payment/Purchases Form

How are Fed-Ex charges paid?

Direct Pay

Can blanket IPR continue to be established?

Yes. This can be continued.

FUNDING

How is an order split between two funds and/or accounts on a single PR?

See the Requestor User Guide section titled "Funding."

How can a fund be added to a requisition when it does not appear in my list of funds?

Click on "edit" on the requisition and type the fund number in the fund field and click the recalculate item.

Since funds other than yours can be seen, will you be able to charge to a fund that is not yours?

No. Even though you are able to select a fund that is not yours, the PR will fail.

Can a Foundation Account Code be entered to make payments?

No.

If an order is less than \$2,000, does it have to go to Sponsored Programs?

Yes. If the item is for consulting agreements/contracts, maintenance agreements/contracts or subcontracts, it requires Sponsored Program Approval. For more information, review the Administrative Approvals procedures on the Purchasing web site.

ORDERING

Can an order be placed with a vendor that is not under state or VT contract?

Yes. Use the non-catalog form.

How can a single order that is scheduled for delivery on two different dates be handled?

If the supplier bills for a partial payment, the Controller's Office will pay only for items that you have received. You will need to process a receiving report each time part of the order is received.

How can an order be placed to New River Office Supply?

Use the non-catalog form.

How does the supplier get the orders?

SciQuest will deliver orders to suppliers via fax. In the future we will build an interface to eVA to deliver registered suppliers to eVA.

What about orders for emergency situations? Example: When heat goes out on campus and Facilities Management needs parts immediately and the Approvers are gone for the day?

In case of emergency, you may proceed to purchase using the Emergency Procurement Procedures as outlined on the Purchasing website. This purchase should be entered into the HokieMart as soon as possible.

When ordering through Grainger, how will the contract price be obtained?

The contract price is displayed in the Punchout.

PURCHASE REQUISITIONS

How can a new PR be created for an item that is on a blanket order?

Use the contract payment/purchases form and enter the contract number in the contract number field on the form.

How is special pricing from a hosted or Punchout contract supplier handled? Special pricing meaning the price is lower than the catalog or Punchout PRICE (or may not be listed in the catalog).

Enter the order on the contract payment/purchases form and reference the contract number.

How can you know if the PR has been approved?

Go to "my requisitions" and the status is indicated at the far left. If a ✓ is indicated, the requisition has been approved.

How is a PR saved to “My Favorites?”

See the Requestor User Guide section titled “My Favorites”.

If a PR in “my requisitions,” if removed, how can the PR be accessed at a later time?

Use ‘History’ to perform a search (you will need the PR#, the supplier, or the Requestor).

Can PRs and POs be seen by other individuals?

Yes.

Is there a way to print requisitions?

Yes. Simply print from the browser or hold down the Ctrl/P/Enter keys simultaneously. When printing POs, click on the printer icon.

What additional information is required on the PR other than the product/service description?

For memberships and service contracts, the service period is required if not written on the invoice. This information should be placed in the product description in the HokieMart. For group meals, the business purpose, date and time of event, attendee listing, and agenda should be included in internal notes or provided through attachments (or with supporting receipt sent to the Controller’s Office).

NEW FISCAL YEAR PURCHASES

Will “future dating” of a PR slow down the receipt of goods?

No. “Future dating” will result in the PO being recorded in the next fiscal year in Banner. The expenditure will not be recorded in the current fiscal year. Use this feature only if you are certain that the goods/services will not be received in the current fiscal year. Use a date of July 1 when “future dating.” Goods/services ordered in a future fiscal year CANNOT be paid prior to the date of the PR.

PAYMENTS/CREDIT MEMOS

How are credit memos handled?

Send them to the Controller’s Office where they will be entered into the Banner system. This will result in a credit to the department’s expenditures. The next time an invoice is entered into Banner for this vendor and it is more than the credit memo, the net amount (less the credit memo) will be paid to the vendor.

Do we need service dates for direct pay?

Yes. Enter the service dates in the produce description field.

How are copier maintenance/rental payments made?

Use the contract payment/purchases form.

P-CARD

Can the P-Card be used in HokieMart?

No.

Can the P-Card be used for any purchases in a department?

Continue to use the P-Card for purchases to local vendors, for over-the-counter sales, and for other purchases where use of the P-card is required. Purchases made with HokieMart catalogs or Punchouts should not be made with the P-card; these purchases should be made in the HokieMart. The majority of purchases should be entered into the HokieMart for delivery to vendors.

SHIP CODES

Where do the “Ship To” codes in HokieMart come from?

Banner

How can a new “Ship To” code be obtained?

Complete the “Ship To/Invoice To Address Request Form” located on the Purchasing Department website in the “forms” section.

How can a current code be updated?

Same as above.

Can a different “Ship To” address” other than default be chosen?

Yes. You can select from your profile list or search from the entire population in the HokieMart.

MISCELLANEOUS

How can a password be changed?

- Profile
- Change Password

Note: Passwords need to contain at least six characters. They can be letters or numbers or a combination of both.

How are new vendors added to HokieMart?

Send a request to the Purchasing Department by selecting New Supplier/Address. See detail procedure in the HokieMart process section on the Purchasing Department’s website.

If there is a power outage and a PC loses power, it is possible to find my cart?

Go to:

- Home
- Draft Carts

PRs that have not been closed or submitted are held here.

Can prices in Punchout, such as OfficeMax and The Supply Room, be compared?

No. This will have to be done manually by visiting each Punchout site. The comparison feature in the HokieMart is only available for items in a catalog.

How is the first Production Logon performed?

You will receive an e-mail with instructions and asked to change your password. The password needs to be at least six characters (numbers and/or letters) in length.

How is a supplier/person search performed in HokieMart?

Enter *supplier name/last name of person* and click on “**search**”

Can a specific folder for incoming e-mail from HokieMart be set up so that it will not be mixed in with other e-mail?

Yes. Contact your department support person for instructions.

Can a contact name be added?

Yes. “Edit” the shipping section in the cart and add the contact name to “contact line 2”.

How is the Controller’s Office notified of an enclosure to be sent with a check? Write the letters “ENCL” beside the PO under in the upper right corner on the invoice/remittance document sent to the Controller’s Office. Also, enter the word “ENCLOSURE” in the description field in the HokieMart on the PR.

Does the Purchasing Department need to establish the “remittance address” for a supplier in HokieMart for a direct pay or contract payment/purchases PR?

No. Normally HokieMart will not deliver the order to the vendor; the Requestor should pick the default order address for the vendor (bold address in HokieMart). When the Controller’s Office enters the invoice into Banner, the remittance address will be selected for the payment. If the Requestor wants the order delivered to the vendor by HokieMart (can only do this for contract payment/purchases by selecting the “PO deliver” option), then the correct order address should be selected in HokieMart. If the correct order address does not exist in HokieMart, a request should be made to the Purchasing Department by selecting the “new supplier/address” supplier.

If you process a Travel Agency Authorization form in HokieMart and later the price changes on the airline ticket after placing the order, does a change need to be made to the PR?

No change to the PR is required. The amount of the travel agency authorization PR will be liquidated in Banner and the actual charge for the airline ticket will be charged to the departmental fund. If the department disputes the actual expense charge, the department should contact the contract travel agency to resolve the disputed amount.

Is the PO number in HokieMart the same as the PO number in Banner?

Yes. HokieMart assigns a temporary PO number which is replaced by the Banner PO number after the PO update workflow step (usually within a few minutes).

For small purchase items will vendors have to pay an eVA fee?

Yes, if the vendor is an eVA registered vendor.

Should all of the items purchased against a contract be listed on the contract payment/purchases form?

No. Use “as per attached invoice #” for contract purchases and provide a general description of the goods or services.

Can orders continue to be placed from non-contract suppliers?

Yes. Use the non-catalog form.