

THE

CART

Special Edition:
Hokiemart Changes

What's happening in Procurement at Virginia Tech

March 2021

System Enhancements Coming To Hokiemart

Starting March 15 through April 12th, system upgrades will be applied to HokieMart that all users should be aware of and plan for. Over the weekend of March 12-14, Jaggaer (the company that provides the technology platform) will be upgrading the aesthetics and user experience in the HokieMart system. For the next thirty days, Virginia Tech HokieMart users will be able to toggle between the “classic” user experience they are accustomed to and the new Jaggaer “UX” user experience (see page 2 for more details). This will give all HokieMart users a thirty day window to get accustomed to the new look and feel of HokieMart before the UX environment goes live officially and the classic view is removed on April 12th.

VT Procurement will also be going live on April 12th with enhancements to the encumbrance process for requisitions that are over \$10K or not against a contract. These are requisitions that require formal procurement by VT central procurement staff or the ITPALS buying staff. After April 12th, requisitions that fit the definition will no longer be encumbered in Banner prior to the purchase order being issued. Instead, the encumbrance process will be standardized across all purchases and not be posted until a purchase order is is-

sued to a vendor.

For departments wishing to post an encumbrance in Banner for a purchase requisition being processed by central procurement or ITPALS, there is a manual encumbrance posting process available to post an encumbrance in Banner. See article on Page 2 for details about this manual encumbrance posting process.

Additional enhancements to HokieMart also include: (1) no longer will there be “R” numbered requisition that needs to be tracked by departments while the procurement is being processed by central procurement or ITPALS; (2) departments will no longer need to call to find out which central procurement buyer has been assigned their requisition, it will be visible in the HokieMart history tab; (3) communications between central procurement or ITPALS buyers and departments will now be handled easily through the internal comments feature on a requisition enhancing the audit trail and becoming a part of the permanent procurement record providing better recordkeeping tracking; (4) sole source waiver requests can be noted on the requisition and the waiver request justifications can be attached directly to the requisition; (5) request for changes to ship-to-

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addresses can be submitted through a request form within the HokieMart system; (6) a request for central procurement assistance in acquisition of a good or service (non-technology) can be made without submitting a requisition utilizing a request form within HokieMart and (7) it will now be easier for departments to track their orders from requisition entry to invoice and payment.

To assist with the conversion of these changes, Procurement will be posting training videos to its website and posting FAQ's. Staff will be available to answer questions through the HokieMart help email: hokiemart@vt.edu. All HokieMart users are encouraged to take advantage of the thirty days when they can toggle between the “classic” user experience and the new “UX” user experience (see Page 2).

These HokieMart enhancements are made available through the SRVPOA Administrative Transformation project.

New Hokiemarkt User Experience

JAGGAER is updating their Procure-to-Pay user interface with a brand new and modern user experience called UX. This means that Hokiemarkt shopping, search, requisitions, orders and invoices will have a new look and feel.

Beginning on March 12, 2021 Jagger will introduce a toggle switch at the bottom of your Hokiemarkt user screen. This toggle will allow you to go from the “classic user experience” that is being used today to the new “UX user experience”. Using the toggle, you can work using the new look and feel in the UX experience. If you get lost or need to refer to how things were in the classic experience, you can toggle to go back at any time; all changes you made in the new experience will be saved.

To aid in learning the UX, we have developed a training video available for viewing showing how the shopping cart will look.

We encourage everyone to take advantage of this toggle to become familiar working in this new UX view because on April 12, 2021 the ability to toggle back and forth between views will disappear and all users will be put into the new UX experience. The more practice you get before April 12, 2021 the easier this transition will be.

The training videos can be viewed at

<https://www.procurement.vt.edu/hokiemarkt.html>

Tutorial-New UX Experience Videos.

Next you will find directions on how to toggle between views.

When the user is in the ‘classic’ view they will see the following at the bottom right hand corner of their Hokiemarkt screen:



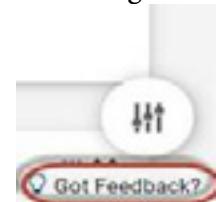
When the user clicks on the toggle they will see the following options:

Choose the shopping experience that best meets your needs. You can switch as often as you like.

- New shopping experience
- Classic experience

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When they are in the ‘New shopping experience’ they will see the following.



Procurement buyers will send a comment through Hokiemarkt to the requisitioner alerting them that the Purchase Order is ready to be issued. If the department is using Banner to pre-encumber funds, they may need to decrease their manual encumbrance at this time to prevent the fund from going into Non-Sufficient Funding status when the purchase order is completed.

To learn more and get access to the FGAENCB and FGAJVCD you can go to <https://virginiatech.pageuppeople.com/learning/5932>

If you have questions about these processes you can contact General Accounting genactg@vt.edu

Encumbrances on Purchase Requisitions

over 10K

Starting April 12, 2021, HokieMart purchase requisitions that are routed through HokieMart to Central Procurement or ITPALS for processing will no longer be encumbered in Banner at the time of PR entry in Hokiemarkt. The posting of the encumbrance will now take place when Central Procurement or ITPALS completes all competition requirements and issues the purchase order. This new encumbrance process is consistent with how encumbrances are posted today when a purchase order is issued under departmental purchasing delegation.

Departments will no longer be able to use an encumbrance entry as a budget planning mechanism for requisitions

being processed by central procurement or ITPALS. Instead, the status of the requisition can be tracked and followed within HokieMart through the history tab of the requisition. For departments who have used PR encumbrances as a budget planning tool, a manual encumbrance entry can be utilized for the same purpose.

Manual departmental encumbrances can be entered using the FGAENCB form in Banner Finance. Once the encumbrance is established, the department can use FGAJVCD to make changes (increases or decreases) to a departmental encumbrance. Departments will be responsible for keeping track of and releasing these types of encumbrances.