

THE CART

What's happening in Procurement at Virginia Tech

June 2024

Year End Preparations

In preparation for FY24 year-end closeout, departments are urged to engage in a comprehensive review and cleanup of any lingering open encumbrances. Departments can identify open encumbrances utilizing the Encumbrance Summary or Encumbrance Aging reports available in MicroStrategy.

If you discover a Purchase Order that requires closure or cancellation, please initiate the automated encumbrance closure process by submitting a cancelled receipt in HokieMart. This step ensures efficient handling and prevents the need to contact the HokieMart helpline via email.

Receipts export from HokieMart to Banner twice daily at 9am and 3pm. These exports kick off a process to release encumbrances on purchase orders that have cancelled receipts. In the event the encumbrance cannot be released by the automated process, the PO will populate on a report that the Procurement team works daily. This ensures that any unresolved encumbrances are promptly addressed.

For more detailed instructions on submitting a cancelled receipt or any other questions relating to encumbrances, please direct them to HokieMart@vt.edu.

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IT Procurement- Frequently Asked Questions

What do I do if my software is free?

- If your software is free, determine if your software meets the criteria for [Low Risk, Low Cost software approval](#). If it does, please submit it through that process for an expedited approval.
- If the free software will handle moderate or high risk data or integrate with an enterprise system, it must be fully reviewed. In this case, please submit a non-catalog requisition in HokieMart with the supplier listed as best vendor and the dollar amount listed as zero. The department should submit the same documentation required for a paid software and the review will follow the same process.

Who do I contact about the University's Microsoft license and adding additional services?

- Collaborative Computing Solutions will assist you with this and can be reached at ccs@vt.edu.

Can I buy software on my personal card and be reimbursed?

- No, software must be approved prior to purchase and should only be purchased via PO or University Purchasing Card.

How do I know the risk classification of my data?

- The software use factor prompt in the Low Risk, Low Cost portal is a good indicator of a low-risk software. The [Division of IT's Policies and Procedures page](#) provides links to the Virginia Tech Risk Classifications and other standards around data.

How do I know if a software has already been reviewed?

- If a software has already been approved, you should be able to find it by searching [Cobblestone](#) or the [Software Service Center webpage](#).

How do I buy AI?

- Microsoft Copilot with Data Protection is available to students, faculty, and staff through their Microsoft 365 accounts and should only be used with low-risk data. More information is available from the Division of IT [here](#).
- If Copilot does not meet your needs, AI tools, such as Chat GPT and Open AI, Claude Pro, etc., can be purchased for low-risk use cases with a Low Risk, Low Cost approval. This must be submitted and approved if you would like to purchase AI services with your University Purchasing Card. Approval notification must be attached to your monthly Purchasing Card reconciliation.

Helpful Links:

- [Cobblestone -- Approved Software Repository](#)
- [Software Service Center - Enterprise Departmental Software and Software Available for Download](#)
- [Collaborative Computing Solutions - Microsoft, Google, and Amazon Web Services; Available for Cloud Service Consultations](#)
- [HokieMart - Procurement System](#)

Harbor Freight Supplier Status Change

Please be advised that Harbor Freight has decided they will no longer accept purchase orders. As a result, they have been removed as a supplier in HokieMart. Departments will need to seek alternative suppliers for their purchasing needs. We understand this may cause some inconvenience and appreciate your cooperation in adjusting to this change. If you need assistance identifying new suppliers or have any questions, please contact the Procurement Department at procurement@vt.edu.



Upcoming Changes To Direct Pay

Starting July 8th, four new Payment Request Forms will be available in HokieMart, replacing the Direct Pay Form as announced in the recent [Ledger article](#). Consistent with Direct Pay, these new forms offer a streamlined process for campus to manage payments that are transactional and do not require competition.

Procurement is working to revise the Direct Pay Policy 3220 and has revised the definitions of payment categories to provide clearer and more detailed descriptions for qualifying transactions. You can find these updated descriptions on the [Procurement website](#).

The new forms provide the following advantages:

- **Direct Conversion to E-Invoice:** Approved forms are directly converted into an electronic invoice, eliminating the need for a purchase order. An electronic invoice moves directly through to the Banner system, reducing the need for manual data entry.
- **No Receiving Required:** Payments can be issued without campus needing to complete receiving in HokieMart.
- **Simplified Invoice Handling:** Invoices for transactions processed through Payment Request Forms do not need to be sent to vtinvoices@vt.edu for payment to be issued.
- **Utilization of Existing Approvals:** Current organization-level approvals will authorize the payment of invoices. All HokieMart approval workflows will apply to these payment forms.
- **Visible Payment Information:** Payment details, such as check number and payment date, will transfer from Banner to HokieMart, making them visible on e-invoices.

A recording of the recent Information Sessions held by Accounts Payable, along with comprehensive user guides and on-demand training, will soon be available via PageUp. Search for: HokieMart Payment Request Forms



Have Suggestions?

Tell us how we are doing by using the link below:

[Give us your feedback](#)

Supplier Outreach Initiative

We are excited to announce a new initiative by Accounts Payable and Procurement aimed at enhancing our invoicing processes. In preparation for a significant invoicing enhancement set to roll out in the near future, the Supplier team will be reaching out to gather valid email addresses from our suppliers.

Why This Matters

Efficient and accurate communication with our suppliers is crucial for the smooth operation of our procurement activities. Upcoming invoice enhancement will streamline our processes, making them more efficient and reliable. To fully leverage this enhancement, having up-to-date and accurate email addresses for all our suppliers is essential.

What to Expect

Our Supplier Team will begin contacting suppliers to verify and update their email addresses. This outreach effort will involve:

- **Email Communication:** Suppliers will receive emails requesting confirmation of their current email addresses and any necessary updates.
- **Phone Calls:** For suppliers with outdated or unresponsive email addresses, we will follow up with phone calls to ensure we gather the necessary information.

How You Can Help

- **Encourage Prompt Responses:** If you are in contact with any of our suppliers, please encourage them to respond promptly to our outreach efforts.

Looking Ahead

We look forward to providing campus with details regarding additional invoicing options in the future. In the meantime we appreciate your support by letting suppliers know that requests for information did generate from the supplier team, and are valid.

We appreciate your continued support of system enhancements.

SWaM Vendor Spotlight: ThunderCat Technology

ThunderCat Technology is a Service-Disabled Veteran-Owned Small Business (SWAM certification number 723626) that delivers technology products and services to government organizations, educational institutions, and commercial companies. Here in the Commonwealth, we hold a VHEPC contract along with OMNIA Partners and VITA contracts.

Combined, these allow us to bring an innovative approach to solving customer problems in and around the datacenter by providing strategies for Infrastructure, Cyber Security, Collaboration, and Cloud Transformation. ThunderCat represents, distributes, integrates, and provides technologies from best of breed manufacturers and your sales team has been working with Virginia Tech now for two decades. Your team is dedicated to being a premier and trusted provider of Information Technology through consistently superior performance, commitment, responsiveness, and integrity with a focus on your mission and needs. Let us help you innovate and excel!

PROCUREMENT SPOTLIGHT

Honoring a Decade of Excellence: Announcing the Retirement of the Director of Procurement



It is with a mixture of joy and sadness that we announce the retirement of our Director of Procurement, Mary Helmick, who will be stepping down in September after a remarkable decade of dedicated service to Virginia Tech, and a combined 30 years of service to the Commonwealth. Throughout her ten years in this pivotal role, Mary has been a cornerstone of our department, fostering the professional growth of her team and enhancing countless procurement processes.

Under her visionary leadership, Mary has not only improved the efficiency and effectiveness of our procurement operations but also nurtured a culture of excellence and collaboration. Her commitment to developing her people has empowered many to reach their potential, leaving a legacy of skilled professionals who will continue to thrive thanks to her mentorship and guidance.

Mary's impact extends far beyond the department; her innovative solutions and improvements have streamlined our procurement practices, significantly benefiting the entire university. She will be profoundly missed by all who had the privilege of working with her.

As we celebrate her retirement, we extend our heartfelt gratitude for her unwavering dedication and exceptional contributions to the University. We wish Mary all the best in her well-deserved retirement and future endeavors.





DID YOU
KNOW?

Hands On Training for HokieMart Requestors Now Being Offered:



- Jul 31st 2024 (Zoom)
- Aug 28th 2024 (In person)
- Sept 25th 2024 (Zoom)
- Oct 30th 2024 (In person)
- Nov 20th 2024 (Zoom)

Registration Required
through [PageUp](#)

UPCOMING EVENTS

ABC's of Procurement Part 1
Sign Up on [PageUp](#)

ABC's of Procurement Part 2
Sign Up on [PageUp](#)