eVA Beginner's / Refresher Course

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Last Updated: January 9, 2018

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General Information

What is eVA?

eVA is a web-based state-required procurement tool designed to automate and streamline procurement for all state agencies. The eVA requisition takes the place of our old paper requisition and the EP (formerly a Direct Order - DO) or PCO (Purchase Card Order) generated in the system replaces JMU's old DPO (Departmental Purchase Order). eVA is a central location to find vendors, reach vendor punch-out catalogs with state pricing, and a storage location for all requisitions and purchase orders.

How can I avoid the fees for non-compliance?

Put all required transactions in the eVA system, and make sure you get a EP/PCO number. If your purchase is an eVA exclusion, make sure that you note the correct eVA Exclusion Number on your voucher. Reconcile your Charge Card online with the correct EP/PCO number or eVA exclusion number. Always, respond to eVA non-compliant reports to validate charges.

What fees are associated with eVA and what are the differences between the different types?

The state's fee for eVA is a 2% fee on every order processed. eVA is self supporting, so the funding goes to pay for the system as well as support personnel and processes (billing and helpdesk).

How do I enter a Pcard in eVA?

Creating a new card:

1) The person whose name is on the card must enter the card into their own eVA account. If you need to let someone else use your card in the system you will "associate" them with your account through eVA. Do not allow others to enter your card into their account.
2) Log into eVA.
3) Click on the "Preferences" link on the Knowledge Center page. You must be on the Knowledge Center page. If you click on the "Preferences" link from any other page it will not take you to the correct location to make changes to your charge card.
4) Click on the Manage Pcard Information link.
5) Click on Create New Pcard.
6) Enter correct information into the fields shown. Make sure that the expiration date is entered in the format shown. (Tip: The alias is an identifier for your card for example "jennyspcard" – you don't want spaces or special characters in the alias.)
7) Click on the Submit button.

Associate a user with your card:

1) Follow steps 1-4 above.
2) Click on the "alias" link.
3) Towards the bottom of the page under the field "New Pcard Users" click on the "Search" button.
4) In the "Last Name" field type in the last name of the person you wish to associate with your card and click on "Search." (Tip: The person you are associating must be an eVA user)
5) From the list that appears, click in the check box next to the name of the person you wish to associate with your card and then click on "Select." (**Tip: If multiple names in the list look familiar use the e-mail address field to determine the appropriate person**.)
6) Click on "Submit".

Change the expiration date of your card:

1) Follow steps 1-4 above.
2) Click on the "alias" link.
3) Change the expiration date to the correct new date. (**Tip: Since our cards don't list a day, but the system requires one, just use the last day of the month that your card expires**.)
4) Click on "Submit"

Delete a card:

1) Follow steps 1-4 above.
2) Click in the check box next to the "alias" link.
3) Click on the Delete button.
4) Follow any other system instructions to complete the deletion of the card.

Note: If your card has been cancelled due to fraudulent charges you would delete that card from the eVA system and then create a new card in the system when you receive your new Pcard. If you had other users associated with your old card you would need to re-associate them with the new card.

Pcard FAQs:

The Pcard option is no longer showing on my requisitions, what happened?

1) It is possible that the expiration date for the card in eVA has passed – you may need to update your expiration date.
2) It is possible that if you were associated with someone else's card that they have made changes to their account and purposefully or inadvertently removed you from their list. It is also possible that the expiration date for the card in eVA has passed. They probably need to look at their account to verify you are still associated with the card and that their expiration date is correct.

I am trying to update my card information and I am in the Preferences link, but I can't find where I update my card.

1) Return to Portal and make sure you are on the Knowledge Center Page – NOT the E-mall page. You can only get to the correct location through the Knowledge Center Page.

I entered or made changes to my Pcard today in eVA and now I want to use it but the system doesn't recognize the new information.

1) Changes / new information is not recognized until after a nightly process – check back the following day.

Can I be associated with more than one person's Pcard?

1) Yes

Can I associate more than one person with my Pcard?

1) Yes

How do I delegate approval authority?

If you are a regular approver in someone else's approval flow you can delegate approval to another eVA user when you have plans to be out of the office. The person you delegate approval to must be an eVA user and they must have signature authority for the orgs/dept they will be approving orders for.

To delegate approval authority:

- Log into eVA
- Click on Shop Now
- Click on the "Preferences" link in the blue bar towards the top of the page. You must be on the Shop Now page to reach the correct area.
- Click on Delegate Approval Authority
- In the Delegate Field – Select the individual you with to delegate approval authority to. You may need to click on "Other" and then do a search for the individual.
- Enter the Delegation Start Date by using the Calendar icon to the right of the field.
- Enter the Delegation End Date by using the Calendar icon to the right of the field.
- If you wish to enter a comment do so in the field provided.
- If you wish to continue to see e-mails about the requests for approval click in the checkbox.
- Click Next
- Follow remaining steps and click on submit.

What is a PR or Purchase Requisition?

A PR is a purchase requisition. It is the official form on which a purchase request is made. A purchase requisition is not the same thing as an official order. Don't confuse them. All fully approved purchase requisitions become a EP or PCO to become an official order.

What is an EP (formerly a Direct Order - DO) and PCO (Purchase Card/ PCard Order)?

eVA terminology for a "purchase order." A EP is created when an eVA requisition (that did not have the SPCC box checked) has gone through the required approvals. If a vendor accepts electronic orders then the eVA EP will be sent directly to the vendor; otherwise, the department will need to email or fax a copy of the EP to the vendor.

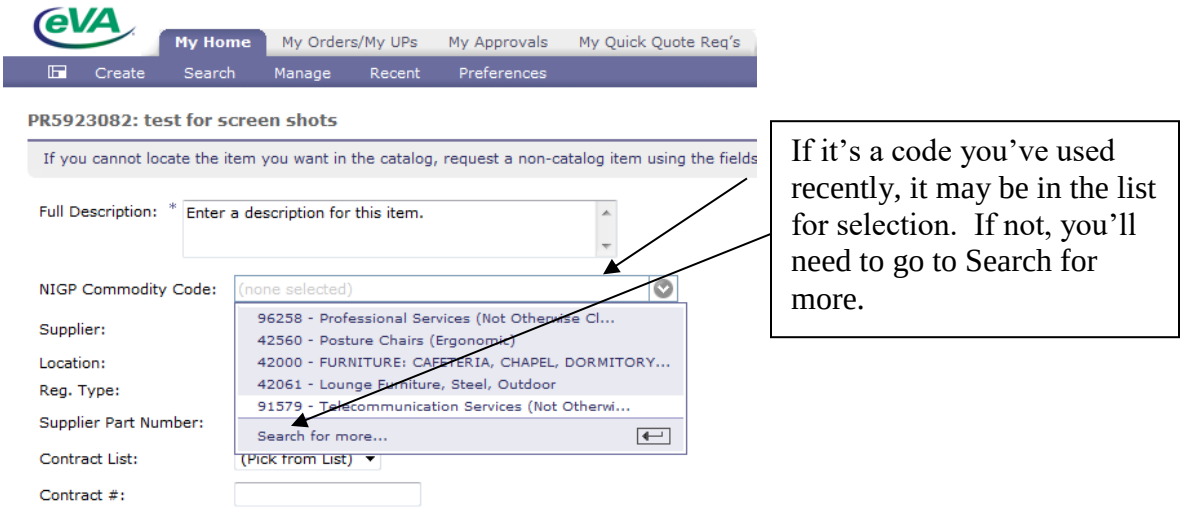
PCO is an acronym for Purchase Card Order. The system will generate a PCO number anytime the Pcard option is selected on the Title Page of the requisition. Keep in mind that if you have a Pcard associated with your account the Pcard option will always default on. Remember to remove the Pcard option anytime you need to pay by an invoice, or if the order is over $4,999.99 you can request your Pcard limit to be raised by contacting Cash & Investments. Many users also remove the Pcard option when completing "confirming orders" so that they reduce the risk of the card receiving duplicate charges.

What is a commodity code and how do I find one?

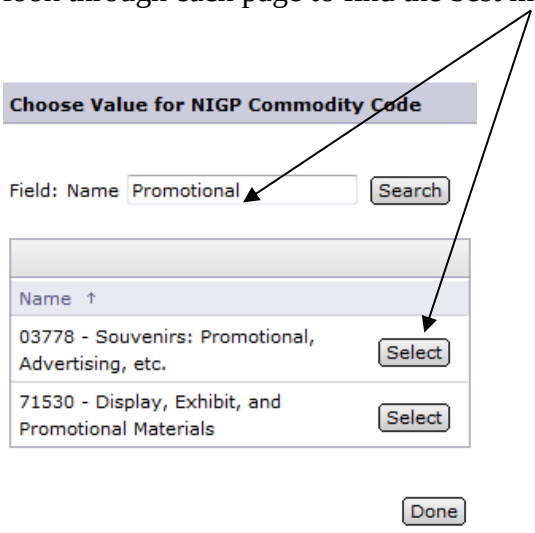
A commodity code is a description used to group products into categories. This code helps the state see what types of items state agencies are buying. All items must have a commodity code selected.

The commodity code in a requisition is only used for various reporting purposes, so while we want you to get as close as possible, it is not critical that the code be an exact match. Don't spend more than just a few minutes attempting to find a code. If it's taking you longer please just pick a code in the general area of products/services and move on.

The commodity code in Quick Quote has a greater importance because it actually determines which vendors are notified about the opportunity. Since you want good responses it is important that the system sends the information to vendors that can actually supply the products/services, it does this through the use of the commodity code.



Enter a word that resembles the product or service you are purchasing and click on search. A list of items should appear that you can select from. If there are no matches change your search word and try again. While this is a short list, sometimes there can be longer lists that span several pages so you will need to make sure you look through each page to find the best match. An example for promotional is below.



What is an eVA punch-out catalog order and how do I create one?

An eVA Punch-Out Catalog order is an order where you utilize an online vendor catalog, through the eVA system, to select your items. Not all vendors that are registered in eVA have a punch-out catalog. Creating a punch-out catalog that works with eVA is typically a lengthy and costly process for vendors. Common vendors that do have a punch-out catalog include Dell, Fisher Scientific, TSRC, VCE, Thomas Scientific, Daly Computers, Colonial Scientific, VWR International, Grainger, CDWG and more.

To create a punch-out catalog order follow this quick step guide or utilize the eVA Overview Manual provided through IT Training.

eVA Quick Reference for Entering a Punch-out Catalog Requisition

Logging In

1. Press the Buyer Login button
2. Go to http://www.eva.virginia.gov
3. Enter your Username and Password or sign-in with your JMU e-ID and password

Creating a Catalog Requisition

1. Select eMall/eForms (status bar on the left column – shows where you are in the order process)
2. Under Create, select Requisition
3. Enter a name for your purchase in the Title Field (i.e.: TSRC – Supply Order)
4. Determine if Use PCard is appropriately selected for your order
5. Select the appropriate PO Category Code (R01) and Procurement Transaction Type (Equipment, Supplies, Printing, etc.) .
6. Click on the "Next" button
7. Click on the "Punch-out Catalogs" link
8. Scroll through the page to find the vendor you wish to purchase from.
9. Click the punchout link for the vendor (i.e.: TSRC – punchout)
10. You will be transferred to the vendor's catalog
11. As per the catalog requirements search for and select the items you need.
12. Once all items are in your cart, click submit or checkout to move the items to your eVA requisition.
13. You will be returned to the eVA catalog screen. Click "Checkout."
14. The items selected within the punchout catalog will be populated in the eVA requisition as various line items.
15. At this point you can either complete a "Mass Edit" of the line items to add the accounting information or you can edit the items one at a time. If you want to edit the items one at a time skip to number 23.
16. **To complete a "Mass Edit"** click in the small check box located just above your first item. The Heading next to this check box is "No." Once you click in this check box a check will be populated in all of your line items.
17. Click on the Edit button below the line items
18. You will receive a message that notes you are using item 1 to complete a "Mass Edit"
19. Enter in you Department Org Code
20. Enter your Account Number for the items being purchased
21. Select the Need By Date (optional)
22. Click Okay, (skip to number 35)
23. **To edit items one at a time**, click in the check box next to item 1
24. Click on the Edit button
25. Enter in your Department Org Code
26. Enter in the Account Number for the item being purchased
27. Select the Need By date
28. Enter any comments for the line item as necessary
29. Click on the OK button
30. If additional items are present click in the check box beside the next item
31. Click the edit button
32. Edit the information as needed
33. Click the okay button
34. If additional line items are present repeat steps 23 through 33 as many times as needed.
35. Once all items are edited with the dept and account information click on the Submit button
36. Review information for completeness on the Summary Page
37. Click on the Approval Tab
38. Review the approval flow to make certain all correct Approvers are present
39. If an additional approver is necessary follow the directions from eVA tip #5.
40. Once the Approval Flow meets all needs click on the Summary Tab
41. Click on the Submit button to finalize the purchase
42. Click on the Home button
43. View the status of your order by clicking on the Status button on the E-mall page

Print Your EP /PCO

1. Click on the Status button on the E-mall page
2. Locate the Requisition # for the order
3. Make sure the status is "Ordered" – this is the only way you will have a EP/PCO to print
4. Click on the PR link
5. Scroll down the screen to the first item and click on the EP/PCO number link
6. Click on the Print button
7. When the PDF file has opened select File/Print
8. If the vendor does not receive electronic orders and you have not already placed the order through another method Fax or Mail a copy of the EP/PCO to the vendor
9. File a copy as needed based on your internal office procedures

Additional Help:

A. There are currently about 22 Vendor Specific Punch-out Catalog Help files located within the Reports and Documents Training Tab. Under Punch-out Catalogs you will find a link to Punch-out Catalog Help Files. Clicking on that link will bring you to a page where you can gain access to specific vendor's help documents.

What is an eVA non-catalog order and how do I create one?

A non-catalog order is simply any order where you do not utilize an eVA catalog. In this instance you are the one that does the research upfront and manually types in all the information (full item description, quoted price, commodity code, selection of vendor, etc.). A non-catalog order may be an original order you are placing with a registered vendor, it may be an original order you are placing with a non-registered (ad-hoc) vendor, or it may be a confirming order. They all have the same process, the only difference is the amount of information you are entering.

eVA Quick Reference for Entering a Non-Catalog Requisition

Logging In

1. Go to http://www.eva.virginia.gov
2. Enter your Username and Password
3. Press the Buyer Login button

Is Your Vendor an eVA Registered Vendor?

1. Click Quick Links drop down on the left column
2. Click Vendor Lookup
3. In the Search box type the vendor name (You may want to just enter a part of the name instead of the specific company name – this will return more search results, giving you greater opportunity to actually find the vendor you are looking for)
4. Click on the Search button.
5. Review the results (if your vendor is in the list they are an eVA registered vendor, if not you will need to "Ad-Hoc" them into the system).
6. Close the current window.
7. Click Return to Portal Home Page button.

Creating a Non-Catalog Requisition

1. Select Shop Now (status bar on the left column – shows where you are in the order process)
2. Press Create button
3. Select Requisition
4. Enter a name for your purchase in the Title Field
5. Select the appropriate PO Category Code (R01) and Procurement Transaction Type (Equipment, Supplies, Printing, etc.).
6. Determine if Use PCard is appropriately selected for your order
7. Determine if "Confirming Order; Do Not Duplicate" is appropriately selected for your order
8. Click on the "Next" button
9. Click on the "Create Non-Catalog Item" button
10. Type in the full description of the first item
11. Select the commodity code for the first item
12. Select Supplier by clicking on the drop down menu arrow
13. (If you need to "Ad-Hoc" a vendor go to eVA Tip #6 for instructions for selecting your Supplier and Location)
14. Enter the Quantity for the first item
15. Select the Unit of Measure for the first item
16. Enter the price per Unit of Measure for the first item
17. Click on the Update Total button to see the Total price of this item
18. Click on the OK button
19. Click in the check box next to item 1
20. Click on the Edit button
21. Enter in your Department Org Code
22. Enter in the Account Number for the item being purchased
23. Select the Need By date
24. Enter any comments for the line item as necessary
25. Click on the OK button
26. If additional items are necessary click in the check box next to the first item
27. Click the Copy button
28. Click in the check box beside item 2
29. Click the edit button
30. Edit the information as needed
31. Click the okay button
32. If additional items are necessary repeat steps 25 through 30 as many times as needed.
33. Once all items are present and edited click on the Checkout button
34. Review information for completeness on the Summary Page
35. Click on the Approval Tab
36. Review the approval flow to make certain all correct approvers are present
37. If an additional approver is necessary follow the directions from eVA tip #5.
38. Once the Approval Flow meets all needs click on the Summary Tab
39. Click on the Submit button to finalize the purchase
40. Click on the Home button
41. View the status of your order by clicking on the Status button on the E-mall page

Approving an Order

1. If a vendor is ad-hoc'd or does not accept electronic ordering, the originator of the order will be the last approver in the Approval Flow.
2. If your Approve button is flashing on the E-mall page, you have something to approve
3. Click on the Approve button
4. Click in the check box next to the requisition you wish to approve
5. Click the Approve button
6. Enter any comments desired (optional)
7. Click the OK button

Print Your EP /PCO

1. Click on the Status button on the E-mall page
2. Locate the Requisition # for the order
3. Make sure the status is "Ordered" – this is the only way you will have a EP/PCO to print
4. Click on the PR link
5. Scroll down the screen to the first item and click on the EP number link
6. Click on the Print button
7. When the page has opened select File/Print
8. If the vendor does not receive electronic orders and you have not already placed the order through another method Fax or Mail a copy of the EP to the vendor
9. File a copy as needed based on your internal office procedure

When and why would I want to place a confirming order?

A confirming order is just a method to maintain compliance with the eVA system. All purchases except for those that fall into one of the approved State Exclusions must be processed through eVA. For orders that are under $5,000.00 there will be times when it is easier to place an order initially over the phone or utilizing the vendor's site. Some individuals just prefer to place orders this way, sometimes it's just more convenient, and sometimes it's almost a necessity because of the way the vendor does business. Orders over $4,999.99 are never processed as confirming orders as they must come through Procurement Services for approval or bid prior to an order being placed.

If an order is placed initially with a vendor that is not registered in the eVA system the process will be essentially the same as a non-catalog order. In this case the only difference is that you must manually add in the vendor information.

If an order is placed initially with a vendor that has an eVA punch-out catalog you will still want to use the non-catalog method to confirm the order.

How do I place a confirming order and will I get a EP or PCO?

The process for a confirming order is the same as the process for a non-catalog order. The main change is in the information you provide for the line items. No matter how many different items you ordered from a vendor on a confirming order you can just confirm them all on one line – this will save time and help to prevent duplicate shipments of the items. In the quantity area for the line item just enter "1." In the price field enter the entire cost of the order you are confirming. The description area of a confirming order is very important. We recommend that you always enter "Confirming Order – Do Not Duplicate" followed by a brief and vague description of your order. Do not give item numbers, colors, sizes or other specific information that might allow the vendor to duplicate your shipment. Note comments like "office supplies ordered via phone 12/1/2015," "lab supplies ordered online 12/3/2016 conf. #12345," "received products invoice #12345."

- Whether you get a EP or a PCO number at the end of the process depends on whether the vendor accepts our Pcard and on whether you leave the Pcard option checked in your requisition.
- If the vendor is an ad-hoc vendor, doesn't accept Pcards, or doesn't accept electronic orders the system won't allow you to process a Pcard order in eVA so you would receive a DO number.
- Even if the vendor accepts charge cards but you uncheck the Pcard box or do not have a Pcard set up in the eVA system the order will be an EP.
- Anytime you leave the Pcard option checked with a vendor that accepts charge cards through eVA the order will be a PCO.

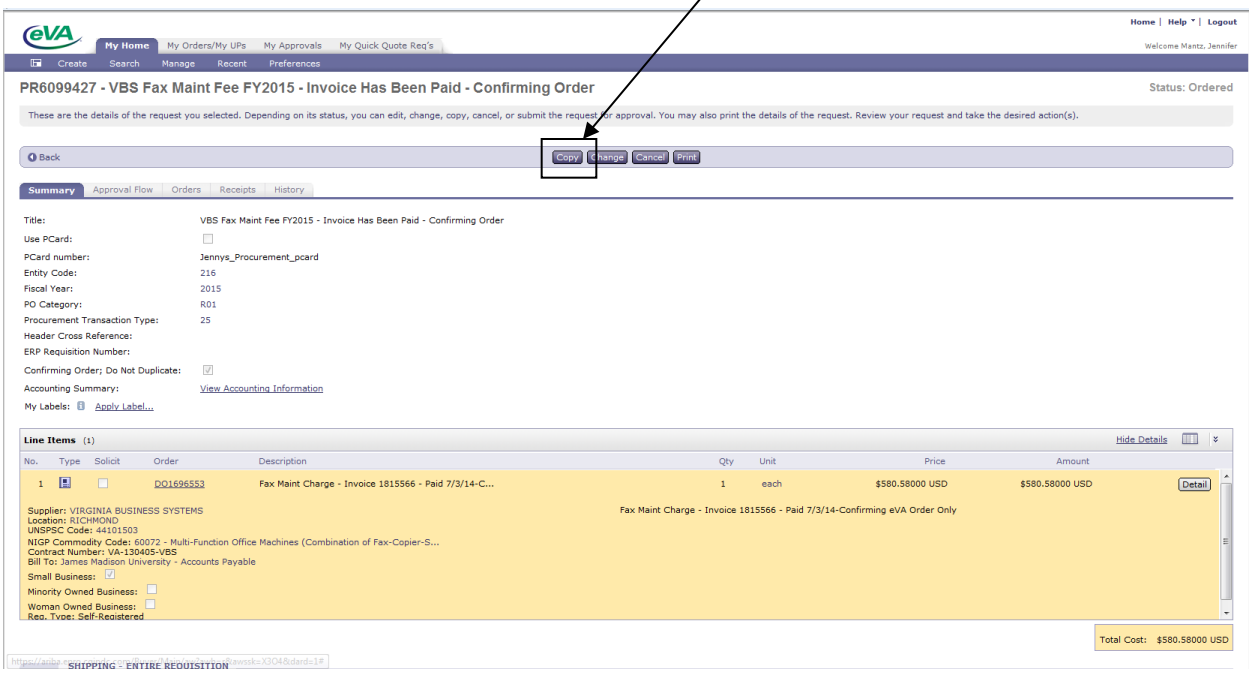
A confirming order and an EP are not the same thing. You can have a confirming PCO order or a confirming EP order, it just depends on whether you left the Pcard option checked in the eVA requisition. When processing a confirming order some people prefer to take the Pcard option out, even if the originally paid for the order on their card, in an attempt to prevent the card being charged again for the same items.

How do I copy an order?

Any order in your account can be copied and used as a starting point for a new order. If you order the same items or utilize the same ad-hoc vendor repeatedly this may be a method to save some time.

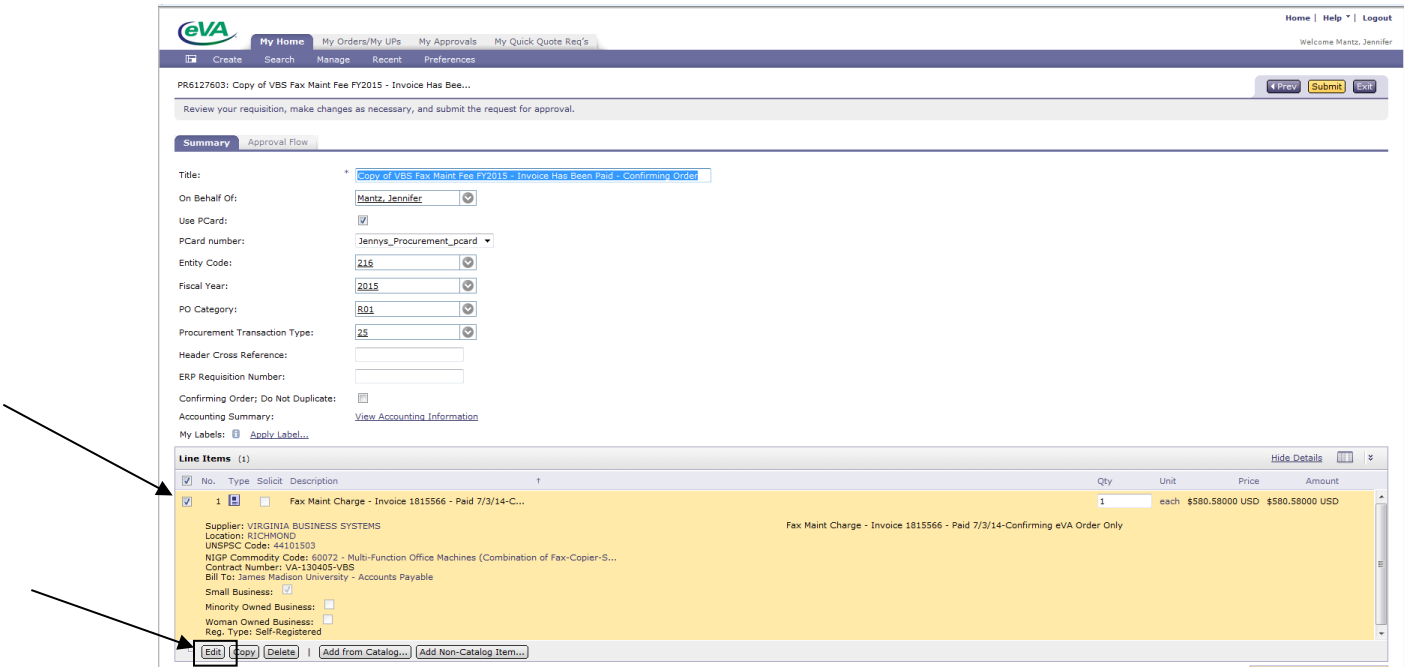
Click on the PR (purchase requisition) number of the requisition you want to copy.

The requisition will open. Click on the Copy button.

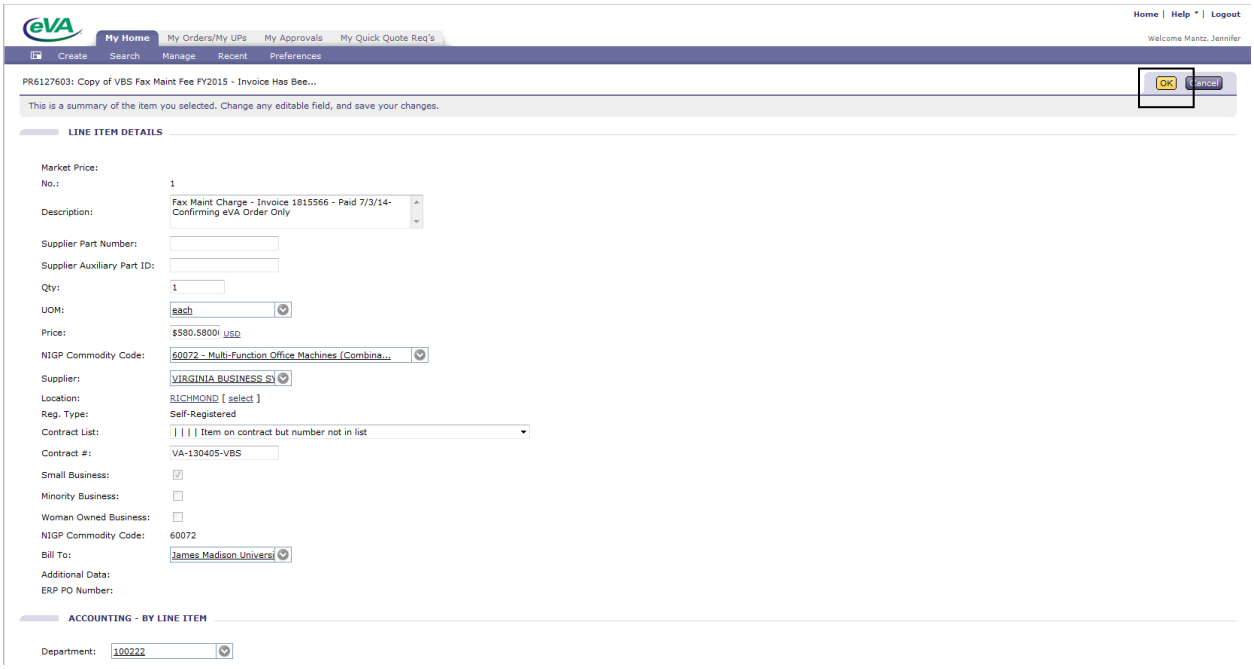


The system will automatically create a copy of the order and put it in composing status. After this step it's like editing any other order.

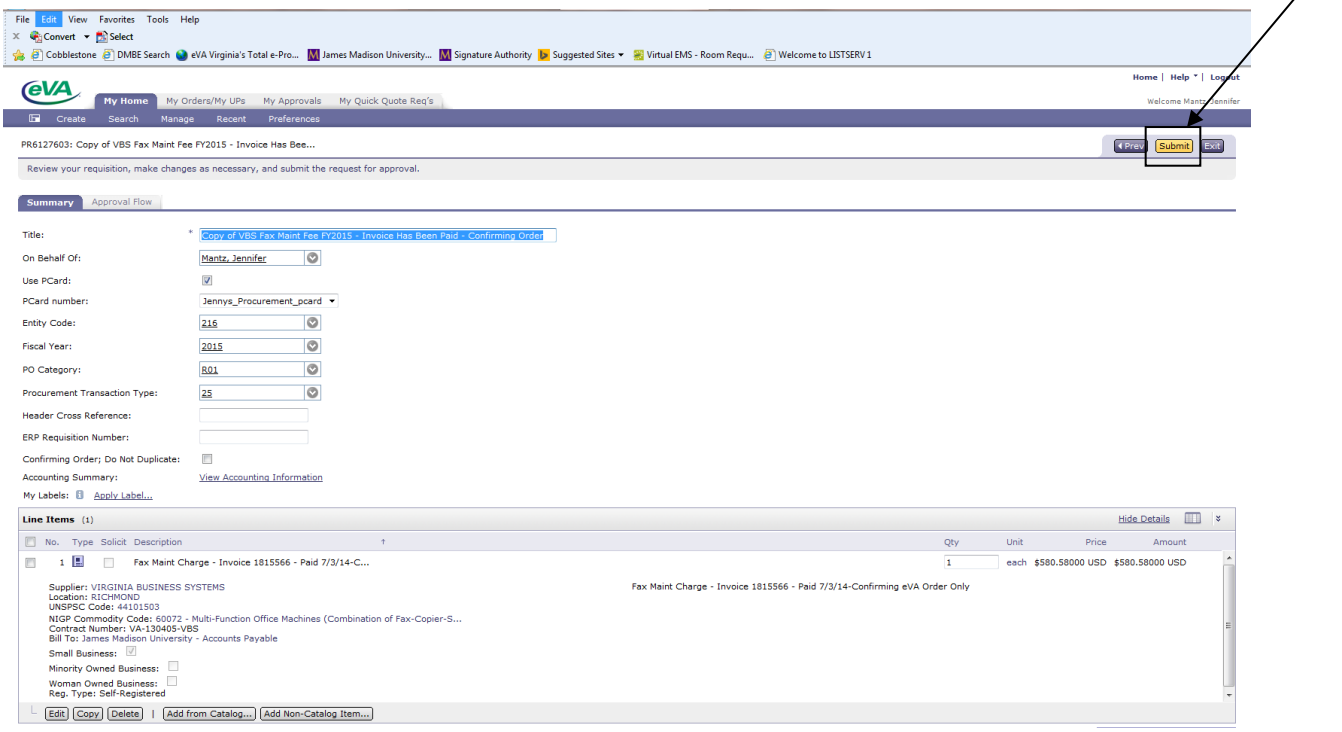
In order to make changes to line items, check the box beside the line items you want to edit, then the Edit button.



Make the necessary changes and click OK.



Once all the necessary changes are made, you would click on submit so that the system will create you a new Order number.



How do I edit or change an order?

You can "Edit" an order that is not in "Ordered" status. You "Change" an order that is already in "Ordered" status. The process is the same for both. In your status area click on the PR that you wish to edit/change. When the requisition opens click on the grey edit/change button. Make the necessary changes and then submit the order.

Tips on changes:
If you do not get the button for edit/change when you open the requisition there is probably already a copy of the order in the Composing box waiting for edits. Check there first and make changes from there as necessary. Also, make sure you are entering the order from the "My Home" tab at the top of the E-mall page, otherwise you will not be given the "Change" or "Edit" options.

If you change anything about the vendor, the system will automatically cancel your original order (EP/PCO) and generate a new order number. The requisition number will be the same with a V2, V3, etc. at the end.

What does V2, V3, etc. mean?

The V2, V3, etc. is just the version number of your requisition. It shows how many times changes have been made to a previously submitted order.

How do I withdrawal an order?

An order that has been submitted, but not fully approved can be "Withdrawn." To withdraw an order simply find the PR in your status area and click on the PR number. When the requisition opens click on the "Withdraw" button. An order cannot be "Withdrawn" once it has been fully approved and gone to "Ordered" status. At the point it has reached "Ordered" status an order can then only be "Changed" or "Cancelled."

How do I cancel an order?

An order that has been submitted, fully approved, and reached "Ordered" status can be "Cancelled." Before you cancel an order make sure that you no longer wish to have the items at all. If you need anything on the order or just wish to make a few changes to the order, then make those changes rather than canceling it entirely. If you are not going to get items ordered or have worked to cancel the items over the phone, you still need to cancel the order in eVA. Remember that both the vendor and JMU are charged a 2% fee on every order processed so it's important to cancel orders as appropriate in the system.

To cancel an order, find the PR in your status area and click on the requisition number. When the requisition opens click on the "Cancel" button. The system will allow you an opportunity to type comments about why you are canceling the order. They are not required, but if you want to include them make sure you click the check box to include comments on the order. You'll then click on "OK" and your order will be processed for cancelation.

Why is the system asking me to approve an order?

The system might ask you to approve an order for several reasons. 1) You are automatically assigned as someone's approver in the system. 2) Another approver has delegated their approval authority to you. 3) The originator of the order added you into their approval flow. 4) You are the originator of the order and the vendor is either a non-registered vendor or the vendor doesn't have electronic ordering and you are the last person in the approval flow.

How do I approve an order?

Once an order is ready for you to approve it will appear in your "To Do" box.

Click on the "Approve" link. If you wish to look at the order you can review it by clicking on the PR number link. If you wish to deny the order, click on the red "Deny" button. If you wish to approve the order, click on the green "Approve" button.

The system will give you an opportunity to make comments and then you will click on the "OK" button.

What is SWAM and what are the requirements?

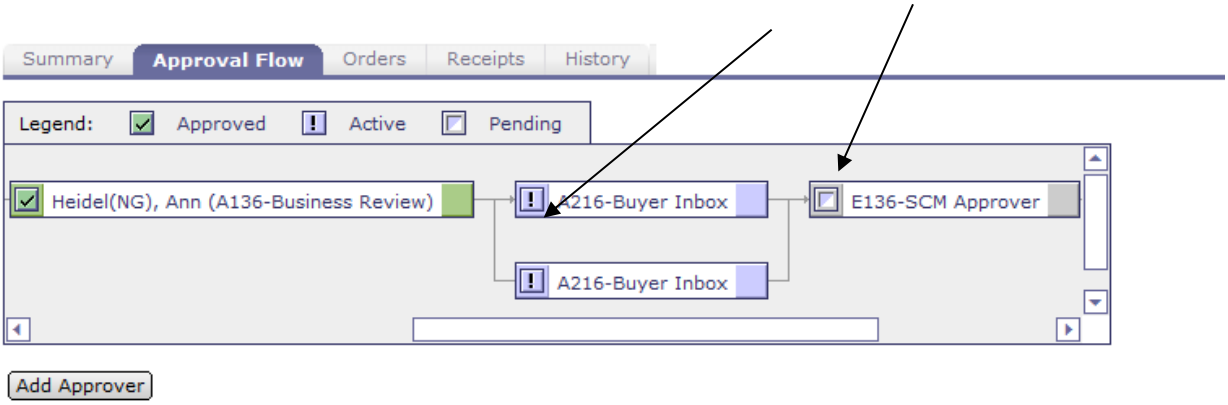
SWAM stands for Small, Woman-Owned, and Minority-Owned businesses. To be considered a SWAM vendor for reporting purposes the vendor must be certified with the Virginia Department of Small Business and Supplier Diversity (SBSD). The certification is free to the vendor, but they do need to take the time to complete the paperwork process. The certification is only valid for three years and the vendor must then recertify.

Buyers across campus should be working to utilize SWAM certified vendors as much as possible. If you are working with a SWAM vendor that has not yet certified you should forward them to the Virginia Department of Small Business and Supplier Diversity or to Procurement Services.

There are numerous SWAM certified vendors in the area of Promotional and Lab Supplies. Buyers *should not* be utilizing non-SWAM certified companies in these areas unless you can prove that the costs were significantly less expensive, you needed the items immediately (point of sale purchases), or the SWAM vendors did not have the items needed.

I submitted my order but it hasn't gone to Ordered status, it still says submitted, why?

First, make sure you're giving the order a few minutes to get to ordered status. This is a web based system so the data needs to go out on multiple servers and return. Typically, it will generate the number within about 5 minutes. Next, go to your status area and click on the PR number you are interested in. Once the requisition opens click on the Approval Flow tab. Don't click on "edit" or "withdrawal" as you'll take your requisition out of the ordering process. Once on the Approval Flow tab review the approvals to be sure none are active or pending.



If there are pending or active approvals they must be taken care of before the order will move to "Ordered" status and generate a EP/PCO. If the vendor is set up as a print vendor or is a vendor you manually entered into the system, **you** (as the originator of the requisition) will always be the last person in the approval flow.

My order is stuck in ordering status, why?

This is typically a vendor account set up issue. When setting up their accounts for electronic receipt of orders the vendor enters in a fax number or an e-mail address in eVA. They must also set up an account in Ariba which is the system that actually sends the electronic information. If your order is stuck in "status" it is either due to the vendor information changing (fax or e-mail address has changed) or the vendor did not appropriately set up their Ariba account.

If the order is stuck for longer than 24 hours please contact the eVA Helpdesk at 1.866.289.7367.

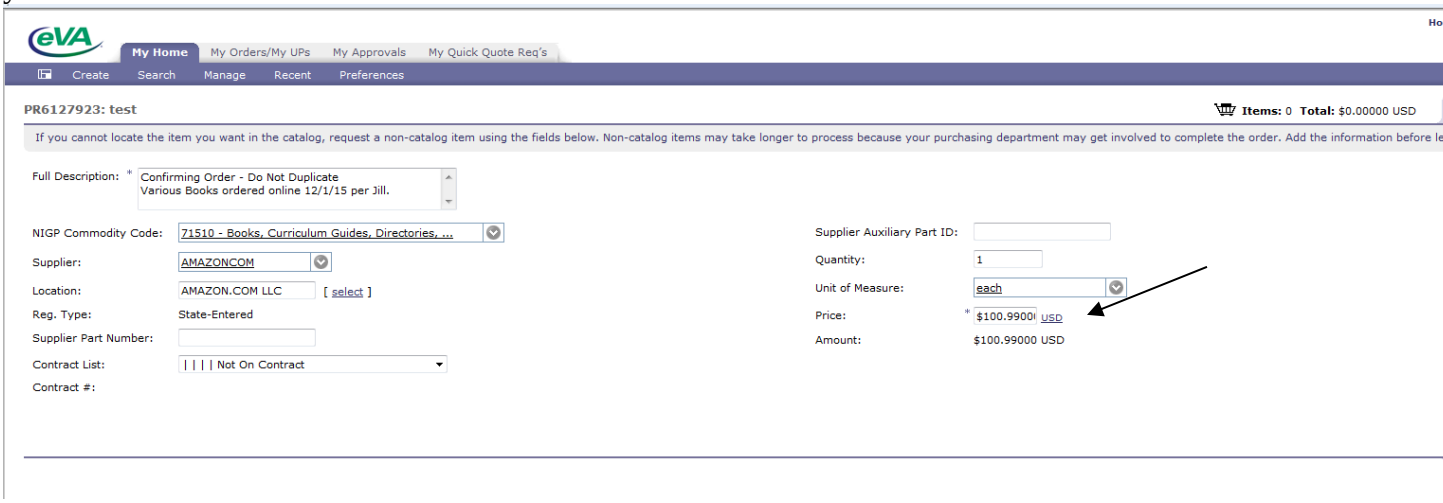
I want to delete an order out of my status area, but it won't let me, why?

A requisition that has at any time been submitted cannot be deleted.

On my confirming orders I keep getting duplicate shipments, how can I stop this?

Unfortunately, there's no guaranteed way to stop it completely. Some vendors are better at dealing with confirming orders than others. Some vendors have entirely electronic processes and no human hands touch the order to see comments or warnings. The best way we have found to reduce the chance of duplicate shipments on confirming orders is to be very vague on the confirming order.

A confirming order should always be done as a "non-catalog order." No matter how many items you may have ordered online or over the phone just process one line item confirming the entire order. This will not only reduce the likeliness that the vendor will be able to duplicate the entire shipment it will also reduce the amount of time you spend on the eVA order. In the description area for the line item always enter "Confirming Order – Do Not Duplicate" followed by a generic description of the order (ie. Lab Supplies ordered over phone on 12/1/2015, Lab supplies ordered online 12/1/2015, Lab Supplies invoice number 12345, Office Supplies order via Susie 12/2/2015, etc.). In the quantity field just put "1." In the amount field put the total amount of your order.



It won't let me submit my order because it tells me I am missing Department or Account information, but I know I have them all filled in. What do I do?

A line item or line items are missing a department or account code somewhere within your order. Typically, this happens when you have more than one line items and the missing code is one of the items. When helping others it has often been beneficial to start with the last item and move forward in an attempt to find the missing code. There is no easy way to fix this, you will need to go through the line items one at a time. Otherwise, you would open each line item until you found one that had "no value" in the Department or Account fields. Then enter the information in and attempt to submit. It is possible that multiple lines are missing this data.

I ad-hoc'ed a vendor just last month but now I can't locate them in eVA? Where did the information go?

If a vendor is ad-hoc'ed into the system, eVA does not save the data. Procurement Services has processes in place to find those ad-hoc vendors and make them "State-Entered" vendors, meaning Richmond receives a copy of the W-9 and enters the vendor information into eVA. The state-entered vendor process does take a few days. If your previous order was recent, you may have to enter the information again or copy the previous order.

If I ad-hoc a vendor one time will I need to ad-hoc them forever?

Not necessarily. Just because you ad hoc a vendor one day doesn't mean they will be a vendor you need to ad hoc forever. Vendors register with the eVA system every day so there is potential that your vendor may register as well. We need departmental buyers that have close relationships with vendors to tell them about eVA and encourage them to register.

Each time before you ad-hoc a vendor into the system the user should search the eVA Registered Vendor listing to ensure the vendor is not in the system. If they are not there are two options for users. 1) Ad-Hoc the vendor each time from scratch. 2) Copy a previous order to that same vendor and edit the copied order with the current information. 3.) Get the vendor to fill out a COVA W-9 and submit it to askeva@jmu.edu so Procurement can work on getting the vendor State-Entered.

Last month I used a vendor and the order went electronically, now this month the system is making me approve the order and is saying I need to print it out and mail or fax the order, what did I do wrong?

First make sure you utilized the vendor you intended. If you did, then you did nothing wrong. Vendors have the option to change their account set up at any time. They can switch from being an electronic to a print vendor, from a vendor that accepts charge cards to one that doesn't, as well as to choose to drop out of the system. Sometimes if the vendor has had issues with their

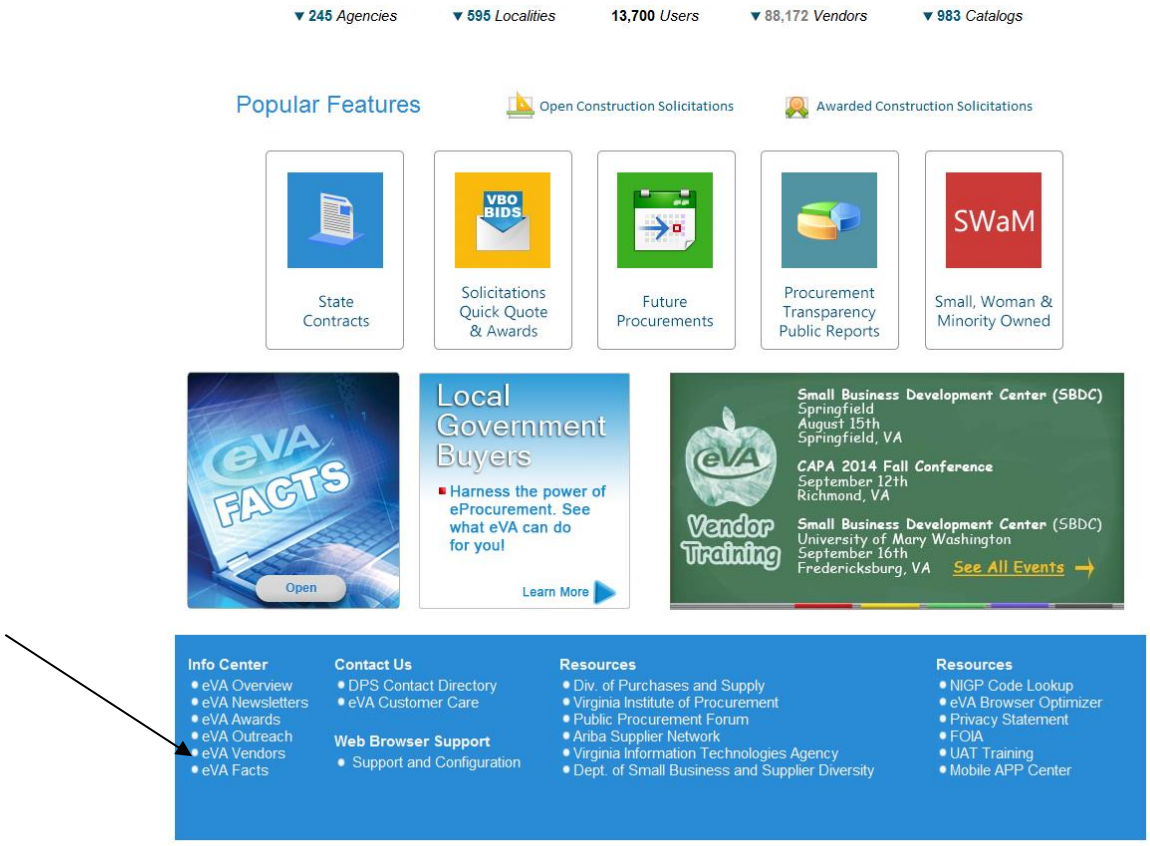
set up or Ariba account the system administrators will force them to a “Print Vendor” status in an attempt to keep orders from getting stuck in “ordering” status.

I need to contact the vendor, how do I find their phone number or e-mail information?

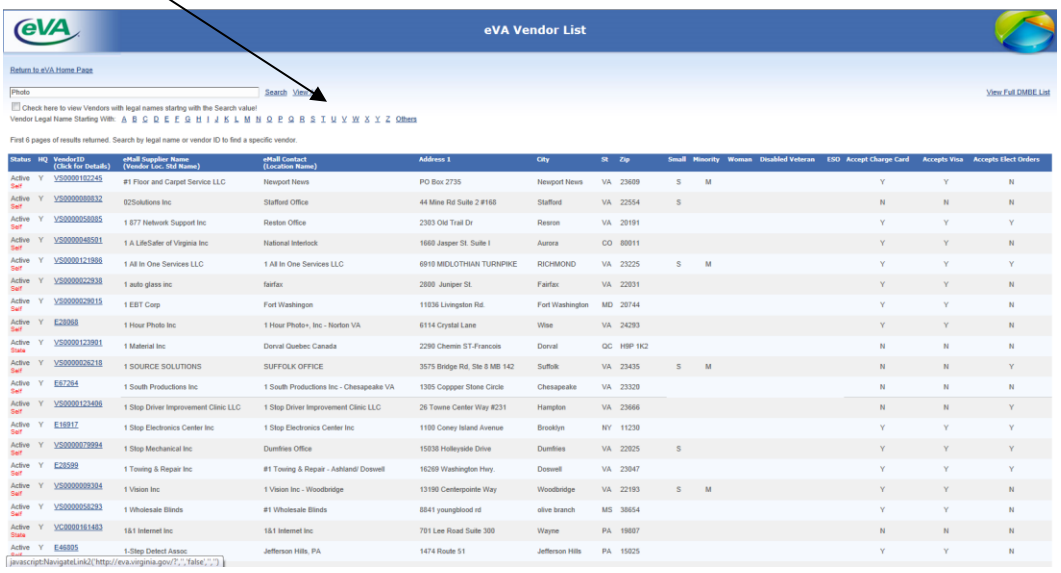
There are a number of ways to do this. You could try to use the old faithful methods of looking them up in the phone book or utilizing the internet to find them. eVA also has a vendor table that will give you basic information on the vendor.

1. Begin on the eVA Homepage – eVA.virginia.gov

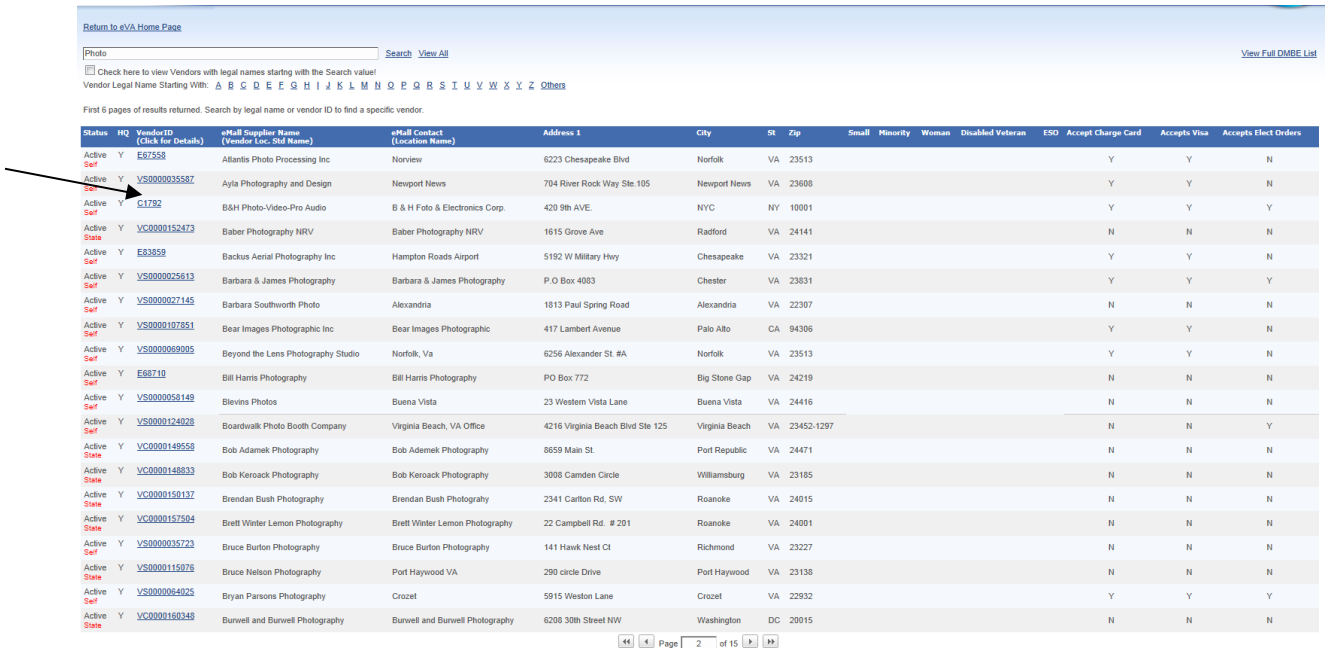
2. Scroll to the bottom of the page and click on the "eVA Vendors" link.



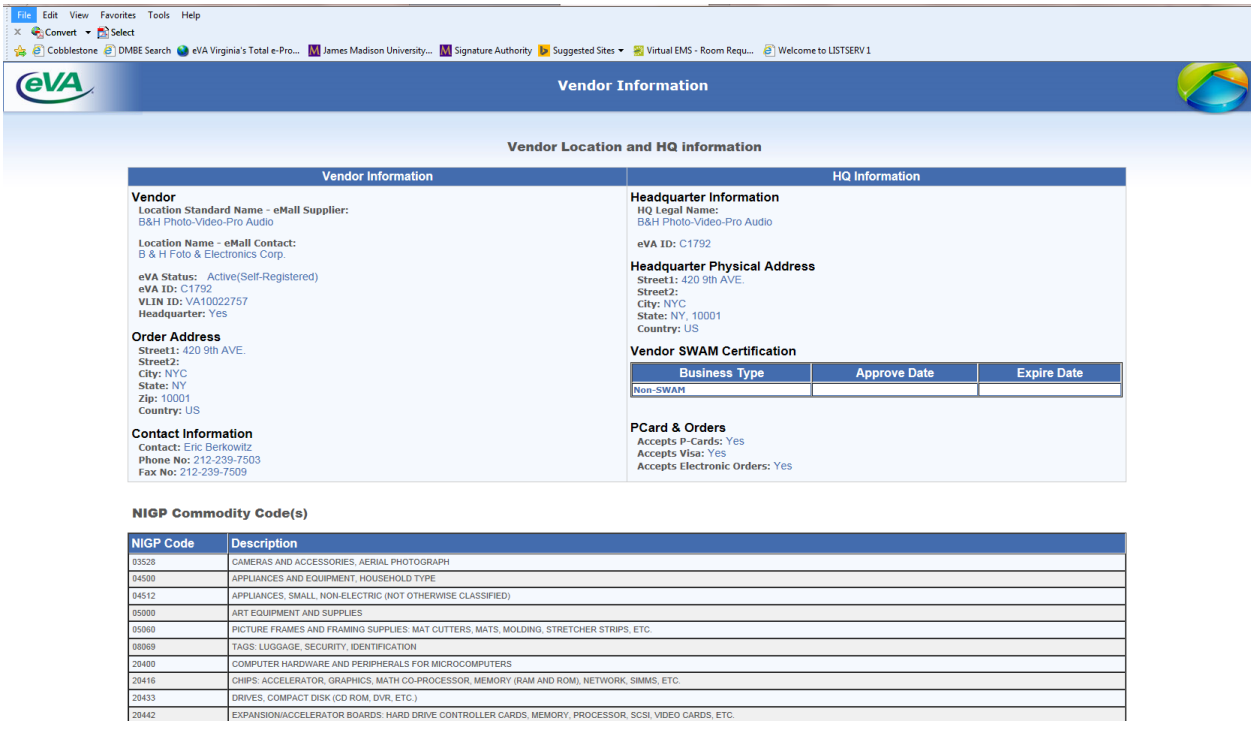
3. In the search bar, type the name (of part of the name) of your vendor. Click the "Search" button.



4. Click on the Vendor ID link of your vendor.



5. The next screen provides more detailed contact information for the vendor (Address, phone number, contact name, fax number). Please do note, however, that this information is only as good as the information entered and kept up-to-date by the vendor.



I still don't understand the PO Category Codes, explain them one more time.

R01 = The vendor used is in the eVA system (registered vendor). The vendor will be charged a 1% transaction fee.
OR
R01 = The vendor used is not in the eVA system (non-registered vendor) – you manually ad-hoc'ed them in OR the vendor is in the system as a "state-entered" vendor.

X02 = Used when the purchase falls into one of the eVA Exclusions OR the purchase is a government to government purchase (this includes public higher education institutions). The vendor will not be charged the 1% transaction fee.

I have a technical issue with eVA (more than I just can't figure out how to do it, but strange errors on the page – pages not working, etc.), what do I do?

We encourage you to take a screen shot of your page by hitting the "Print Screen" button on your keyboard. Then open a blank Word document and click Paste. The screen shot will be pasted in your Word document. Save the document and send it in an e-mail to askeva@jmu.edu. In the e-mail report the issue, what you were doing when you got the error, and any other pertinent information (i.e. you've tried several times with the same result, the person sitting next to you is getting the same error, you've already cleared your cookies/cache and continue to get the error, etc.).

Any issue can be routed through the SSC Help Center at 877-340-5577 or directly to the eVA Helpdesk. If the issue is of a more technical or vendor specific nature, the Help Center will typically escalate the issue to the eVA Helpdesk.

What is a blanket order?

A blanket order is an order that covers specific purchases for a period of time. Blanket orders are typically entered as non-catalog orders and are always $4999.99 or under. A blanket order must not cross fiscal years. Vendors must agree to a blanket order being processed through eVA as they will be charged the 1% transaction fee up front. You must keep an internal record of payments that are made against the blanket order. If audited, you must be able to show that you have tracked the decreasing balance of the order. If you are not going to use the entire amount entered on the order you must reduce the amount of the order within eVA. An example of a blanket order would be a situation where you are charged a recurring monthly fee. If the fee were $20 per month the blanket order would be entered for July 1, 2015 – June 30, 2016, with a total amount of 240.00. Each month as you reconciled your credit card or processed an accounting voucher the same eVA Purchase order number would be utilized on the forms.

See eVA Tip #008

What is order splitting?

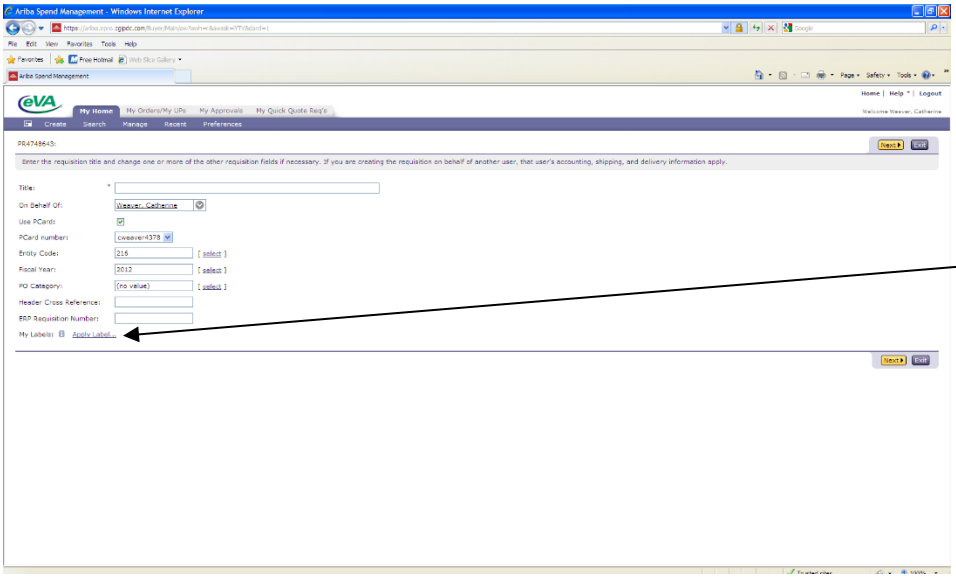
Order splitting is when you process multiple orders to one or more vendors for a similar purpose within the same day or just a few days apart that end up totaling over $5,000.00. Orders over $4,999.99 must come through Procurement Services for approval or to be bid. It is not appropriate to split orders to keep them from coming through Procurement Services. For example, you wish to purchase five items from Vendor ABC for an event to be held on July 1. The total order will cost 6,500.00. The entire order for 6,500.00 should be placed on one requisition and processed through Procurement Services. If you process EP1234567 with three items totaling $4,300.00 and EP2345678 a few days later for the remaining two items totaling $2,500.00 you will have participated in order splitting. If you believe what you are about to do may give the impression of order splitting, please contact Procurement Services to discuss the situation first. It is also unethical to request a vendor to split an invoice for you so that you can follow-up with separate purchase orders.

eVA Tips

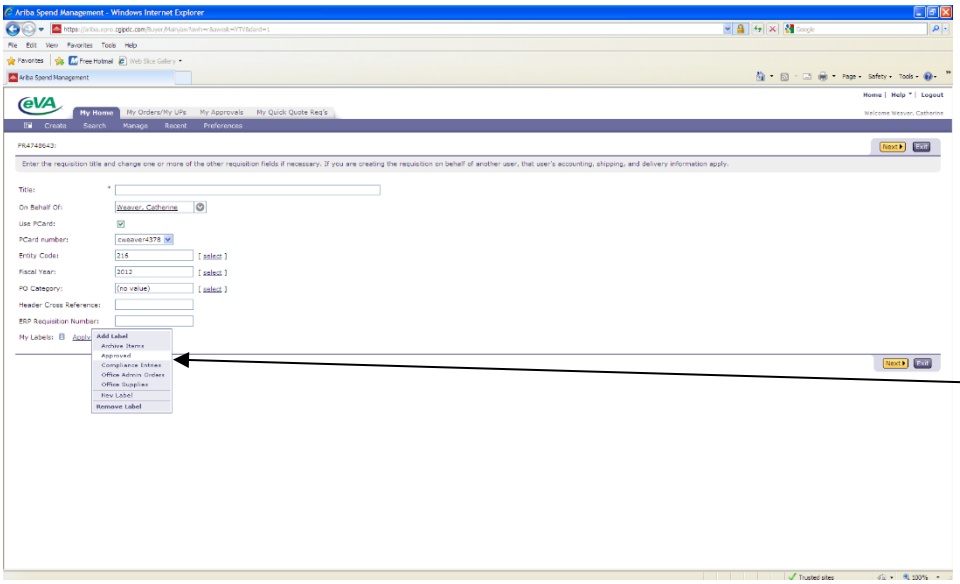
eVA Tip #0001 – Applying a Label To Organize Your Work

In eVA you can apply labels to organize your orders just like you can create folders to organize paperwork in your desk drawer. A label can be applied to a requisition (PR) and/or to an order (EP or PCO). Multiple labels can be applied to the same document. Labels can be applied to a document from a variety of locations; there is no right or wrong method – just personal preference.

Applying a Label from the Title Page

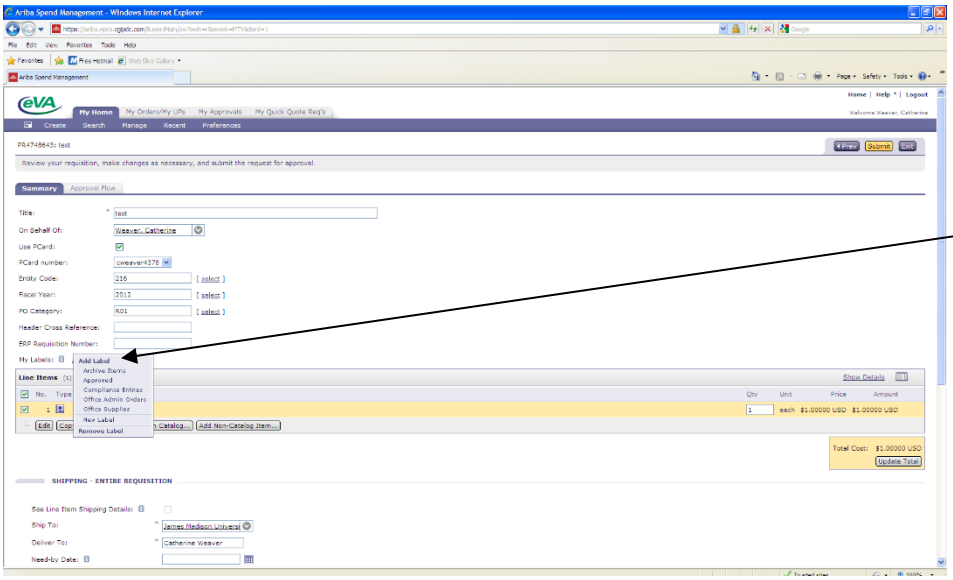


From the Title page of a requisition a folder can be created by clicking on Apply Label.



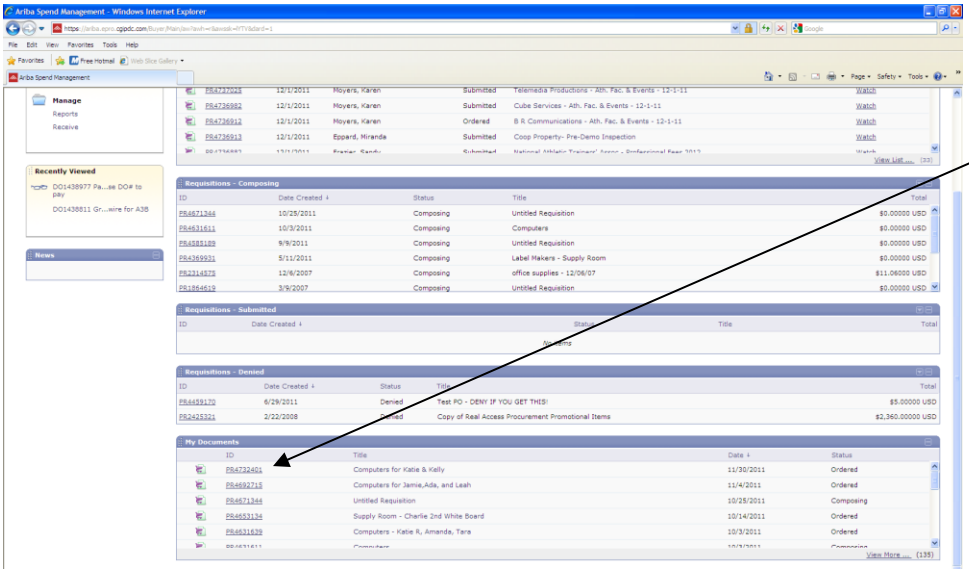
A box will appear that allows you to select an existing label or to create a "New Label"

Applying a Label from the Checkout Page

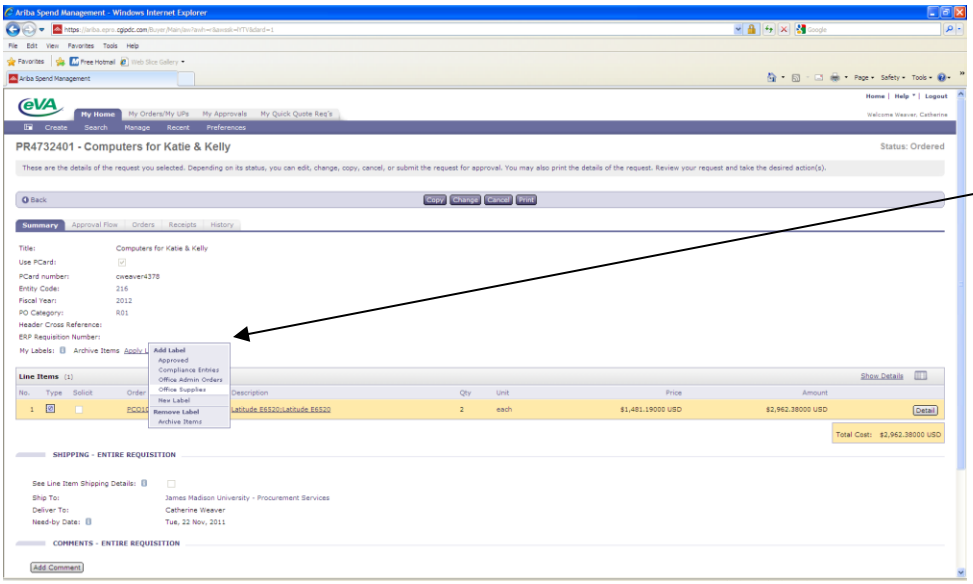


Click on Apply Label and a box will appear that allows you to select an existing label or to create a “New

Apply a Label to a Completed Requisition

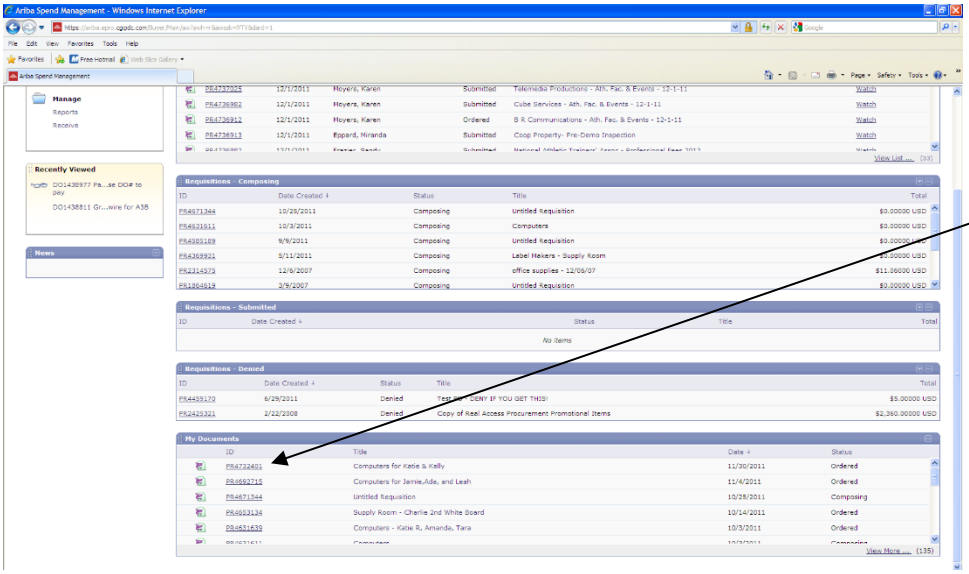


To apply a label to a completed or existing requisition, find the requisition and click on the PR # link.

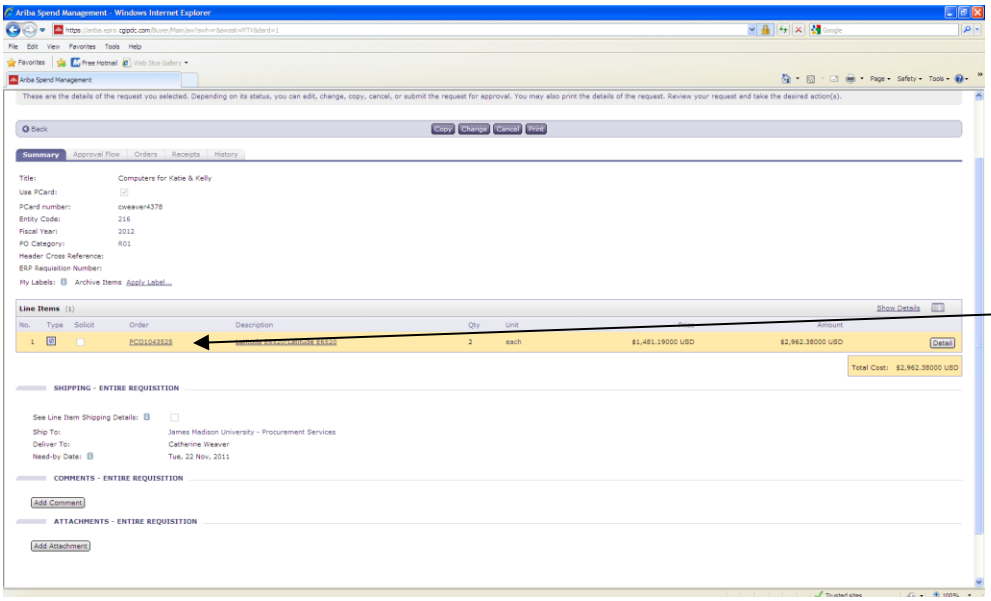


Click on Apply Label and a box will appear that allows you to select an existing label or to create a "New Label"

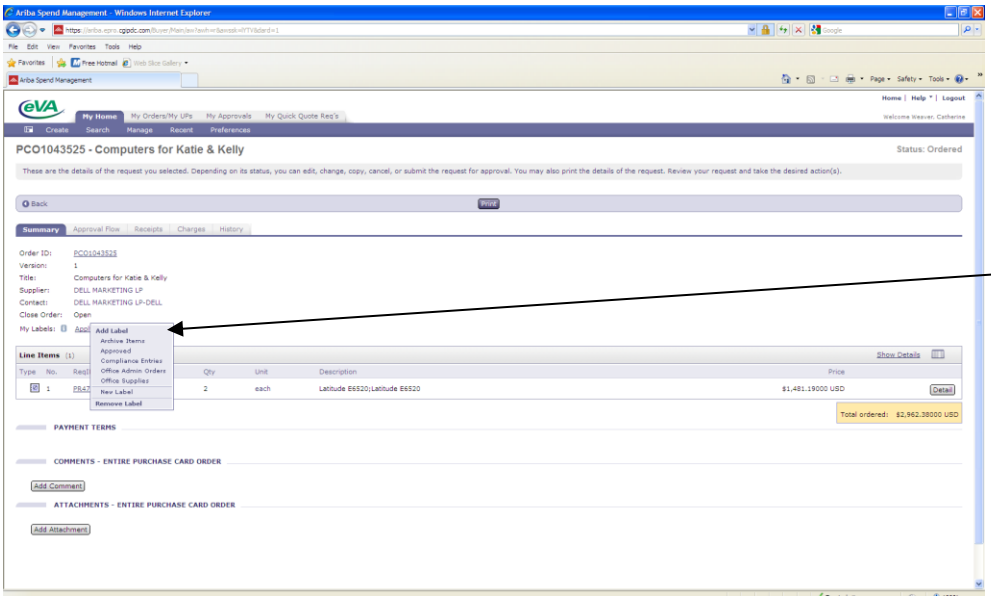
Apply a Label to a DO or PCO instead of the PR (requisition).



To apply a label to a EP or PCO, find the requisition and click on the PR # link.



Then click on the EP or PCO #.



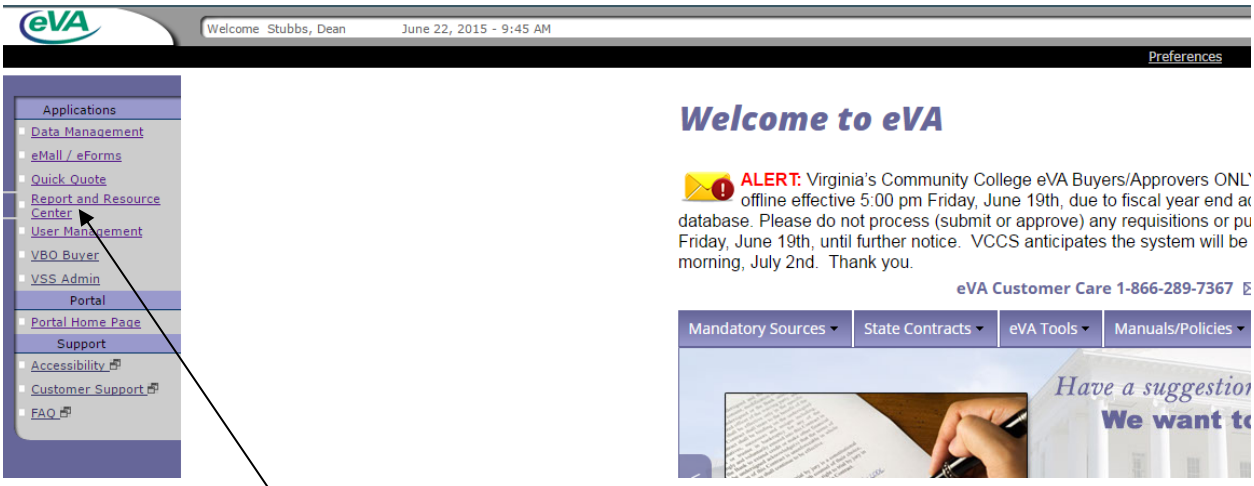
Click on Apply Label and a box will appear that allows you to select an existing label or to create a "New Label"

NOTE: See [eVA Tip #0010] for finding items that you have labeled.

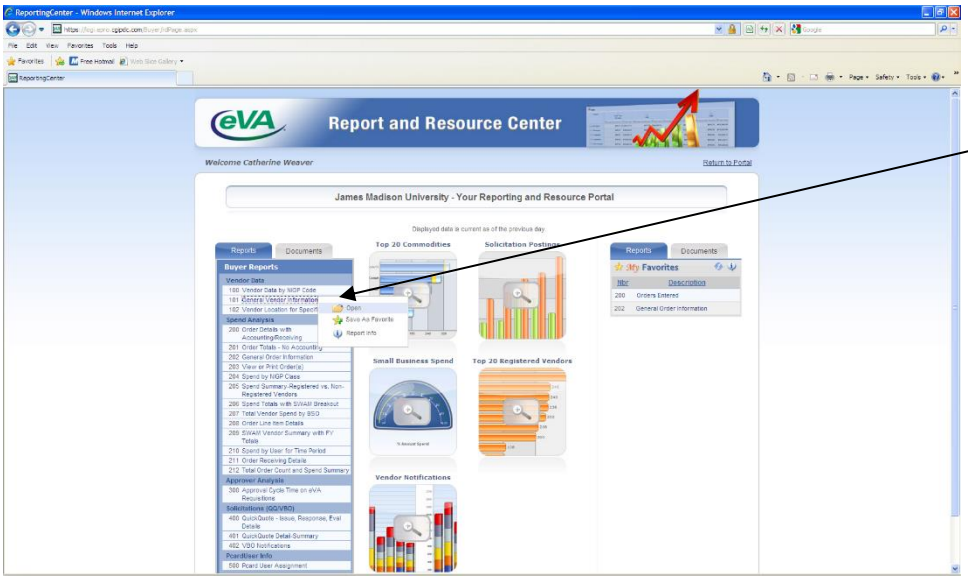
eVA Tip #0002 – Is Your Vendor An eVA Registered Vendor

In eVA you can search to see if a vendor you typically use is an eVA registered vendor. There are multiple ways to do this, below are the two most common methods.

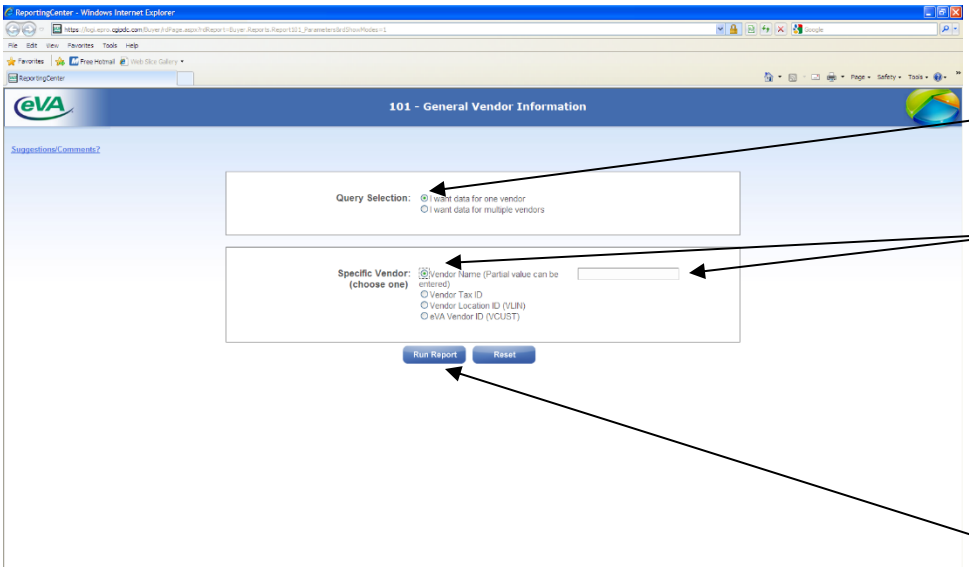
From inside of eVA – after you have logged in.



Click on the **"Report & Resource Center"** link from the Portal Home Page.



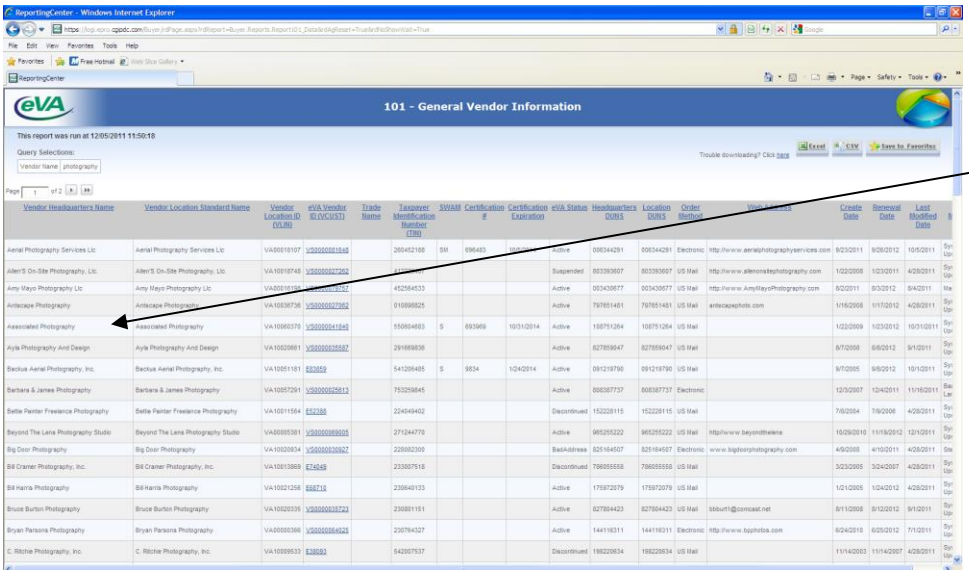
Click on 101 General Vendor Information and then click on "**Open**".



When the page first appears it will only have one box. Select the button for "**I want data for one vendor**."

A new box will appear and you can select how you wish to search for that vendor. Select they option you want to search by and then type in the information you have (most common will be to search by vendor name.)

Click "**Run Report**"



The report will appear after a few minutes. You can then review the results to find the information you were looking for.

Find a Vendor Outside of eVA – Before Log In

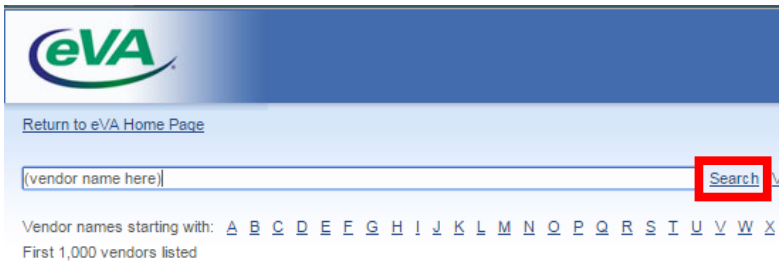
1.) Navigate to eva.virginia.gov

2.) Once the eVA homepage loads scroll down to the very bottom and click on “eVA Vendors” under Info Center

3.) The eVA Vendor List page will load

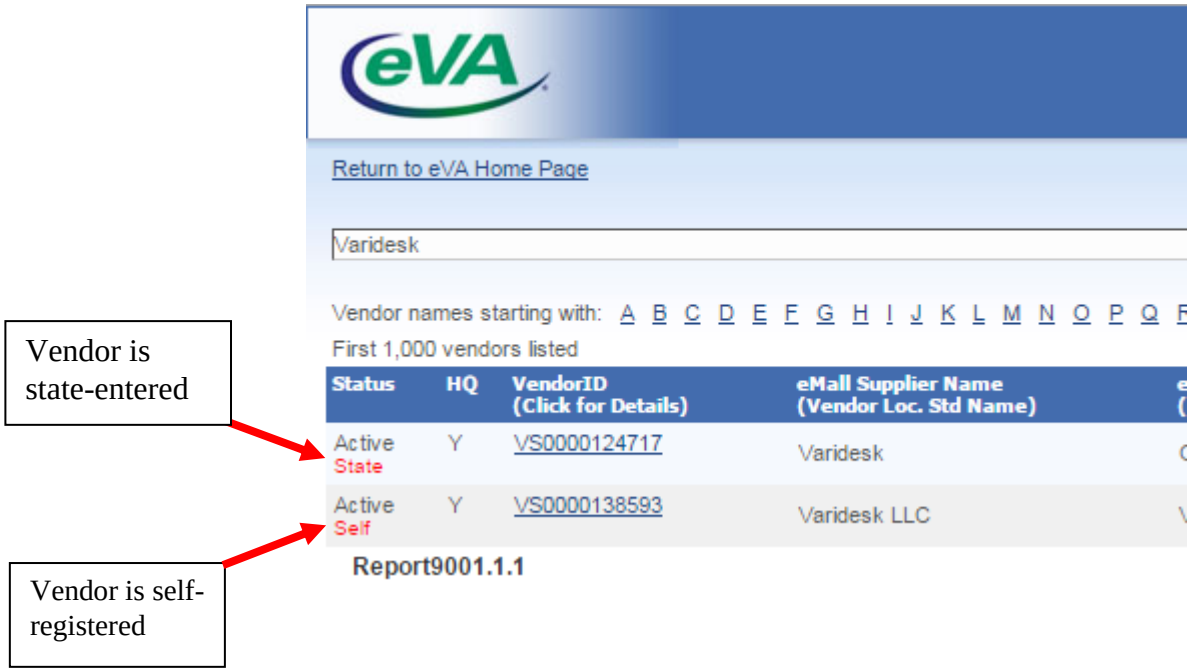
4.) In the search field you will enter the vendor’s name and then click search

a. You can use the % before and / or after the vendor name as a wildcard
   i. example% - finds vendors with names that start with example
   ii. %example% - finds vendors that have example somewhere in the their name
   iii. %example - finds vendors with names that end in example

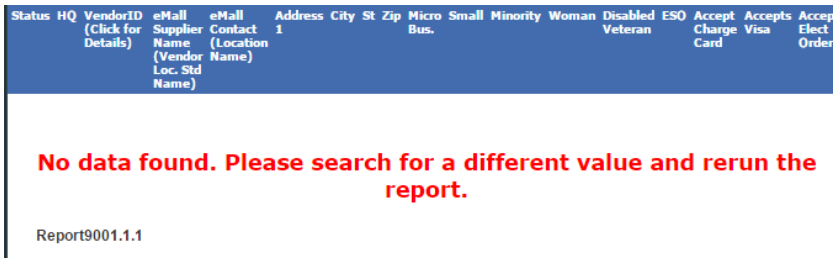


5.) If the vendor is in eVA you will see the following page

a. On this page look under the “Status” column

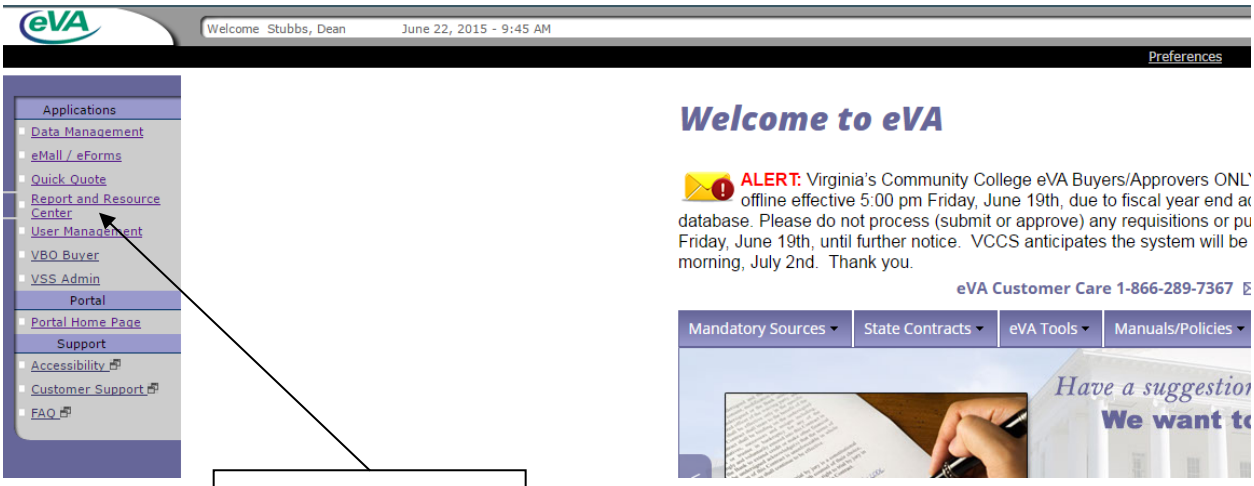


6.) If the vendor is not in eVA you will see message



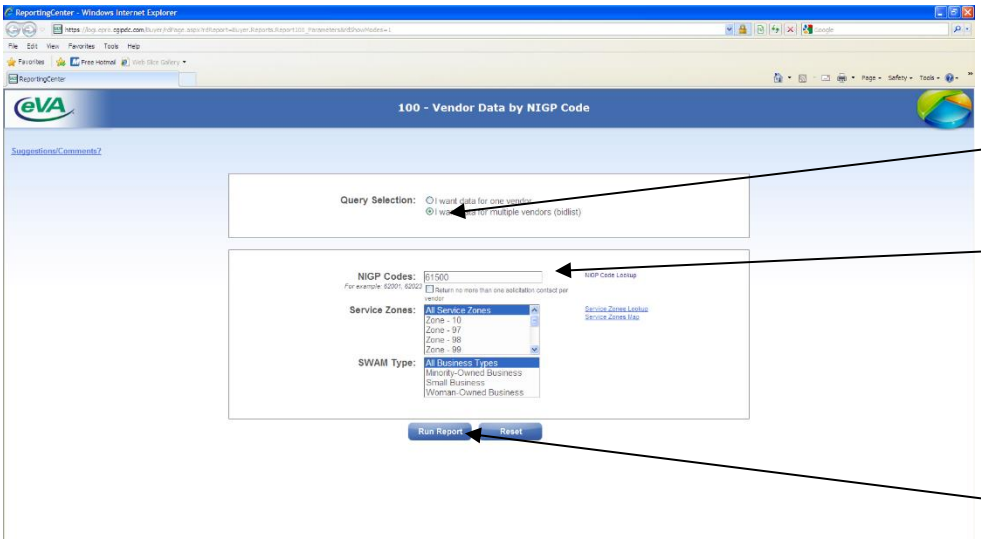
eVA Tip #0003 – Looking For A Registered Vendor By NIGP Code

In eVA you can search for an eVA Registered vendor by the type of item you're looking for.



Click on the **"Report & Resource Center"** link from the Portal Home Page.

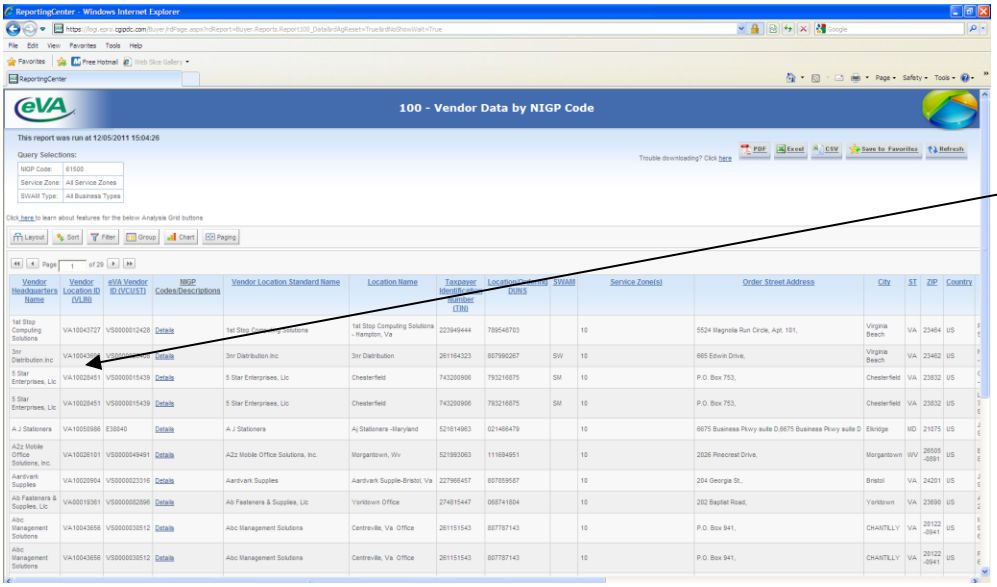
Once in the Report and Resource Center click on "**Vendor Data by NIGP Code"**. Then click on "**Open"**.



In the first box that appears click the button for "**data for multiple vendors.**"

In the next box that appears enter the NIGP code in the NIGP code field. You can search for the code if needed. You can also refine your search by selecting one or more of the various SWAM Types.

Then click on "**Run Report.**"

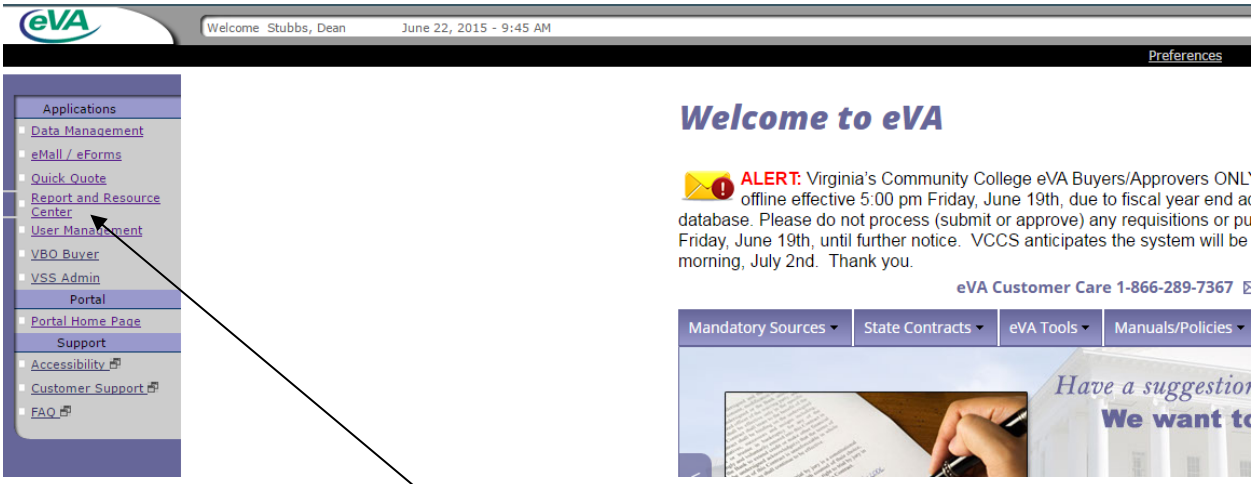


Vendors that selected the NIGP code as one of their offerings during the registration process will appear. You can contact these vendors to determine if they offer the items/services you're looking for.

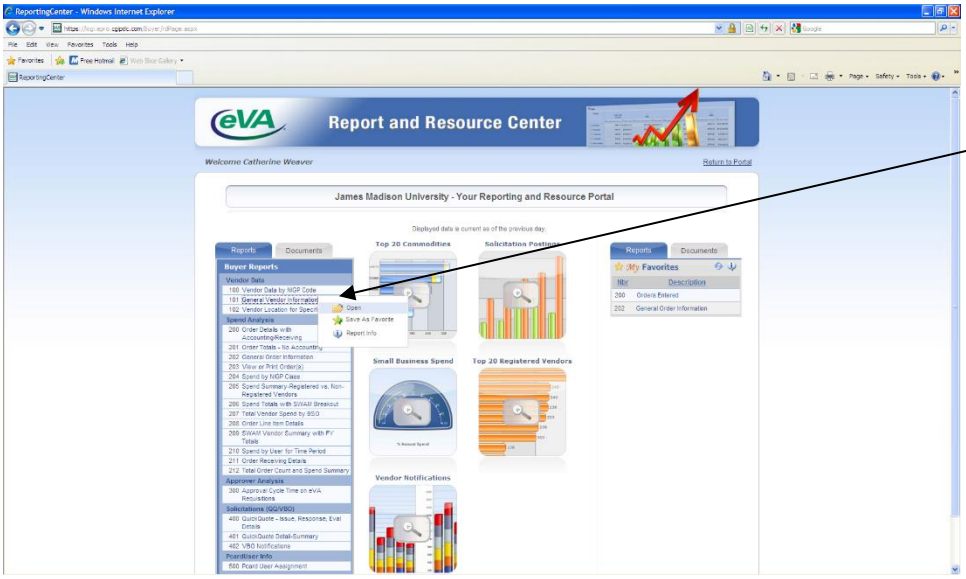
Note: You can always call the Procurement Buyer that deals with the commodity. They might have additional information on vendors that you could try.

eVA Tip #0004 – Locating A Registered Vendor's Contact Information

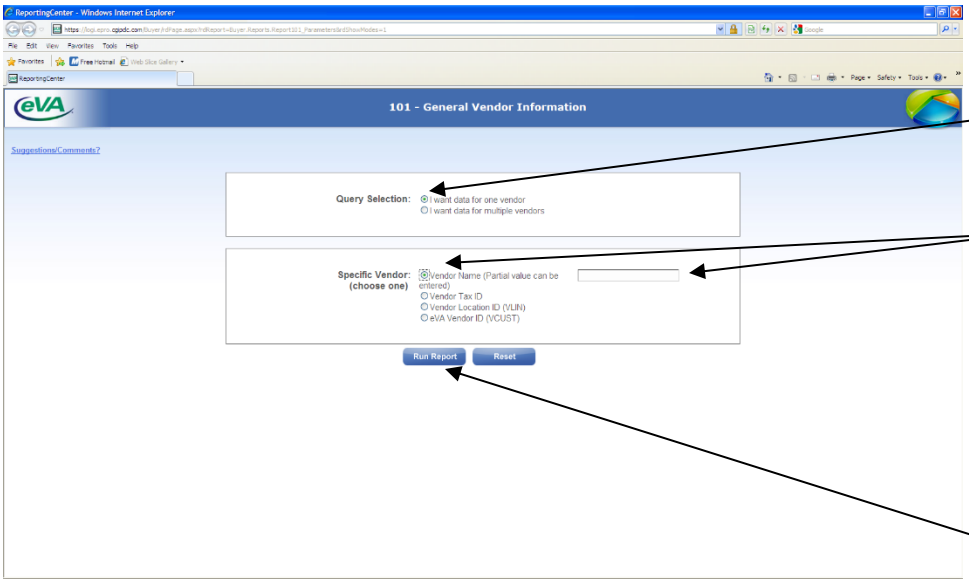
In eVA you can find a vendor's phone number and other contact information.



Click on the **"Report & Resource Center"** link from the Portal Home Page.



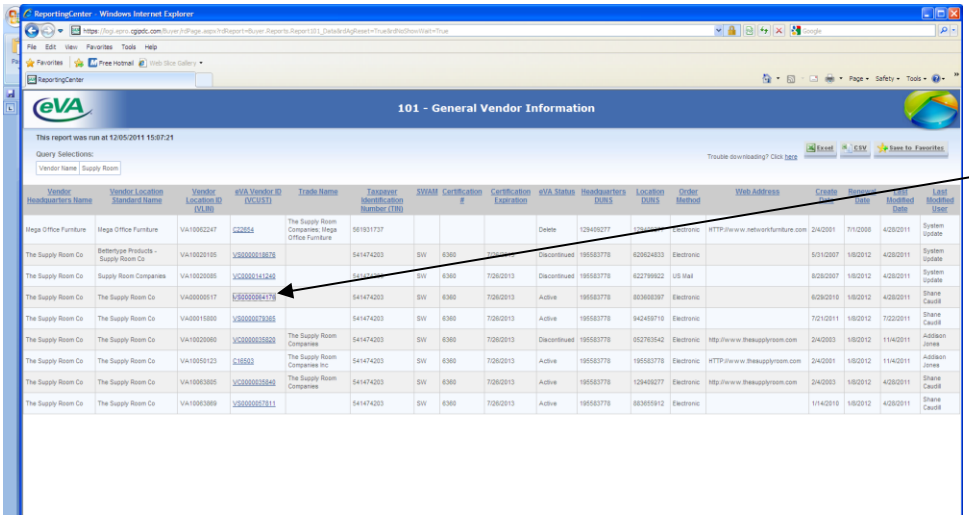
Click on "**101 General Vendor Information**" and then click on "**Open**".



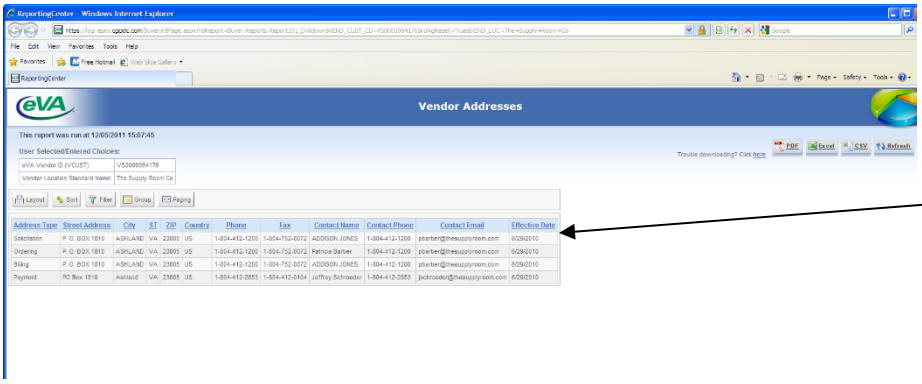
When the page first appears it will only have one box. Select the button for "**I want data for one vendor**."

A new box will appear and you can select how you wish to search for that vendor. Select the option you want to search by and then type in the information you have (most common will be to search by vendor name.)

Click "**Run Report**"



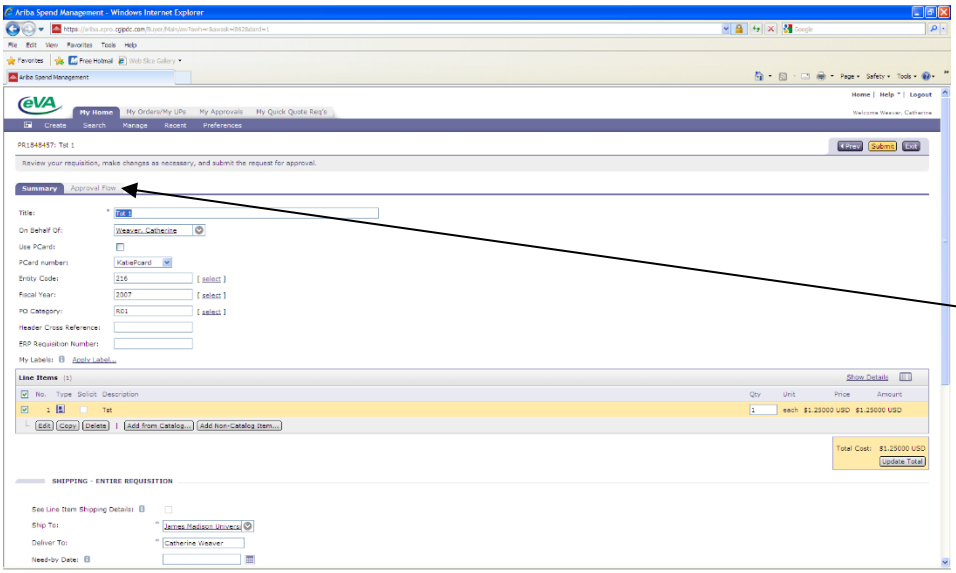
Click on the eVA Vendor ID number link.



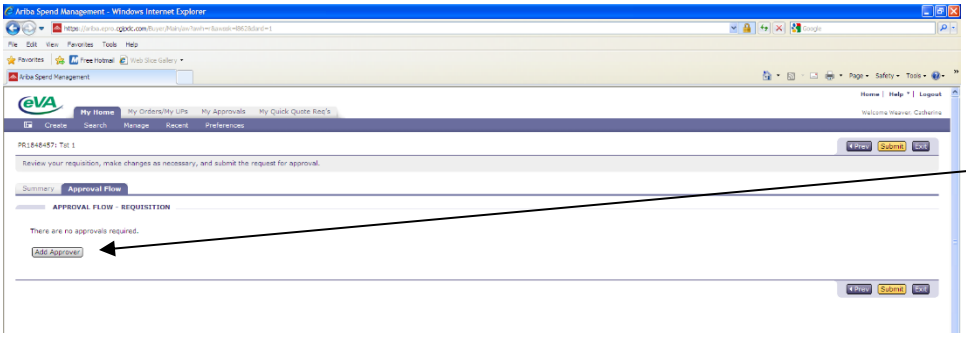
You will now be able to review contact names, phone numbers, and other information about the vendor.

eVA Tip #0005 – How To Ad Hoc An Approver

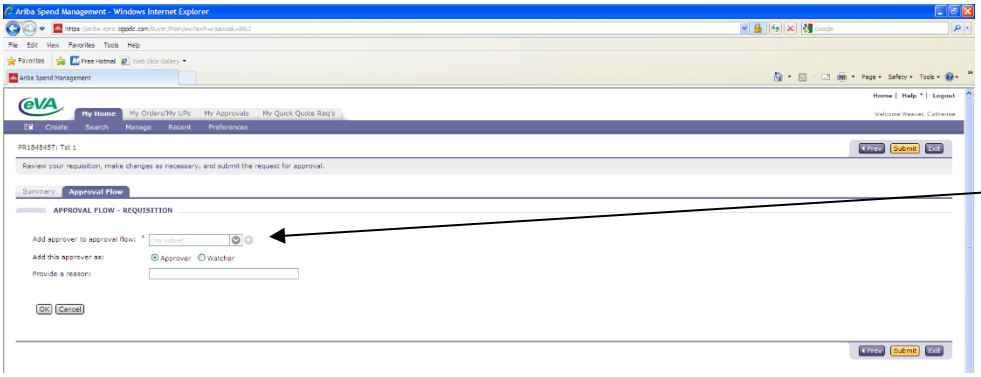
In eVA you can "Ad Hoc" or add approvers to your approval flow.



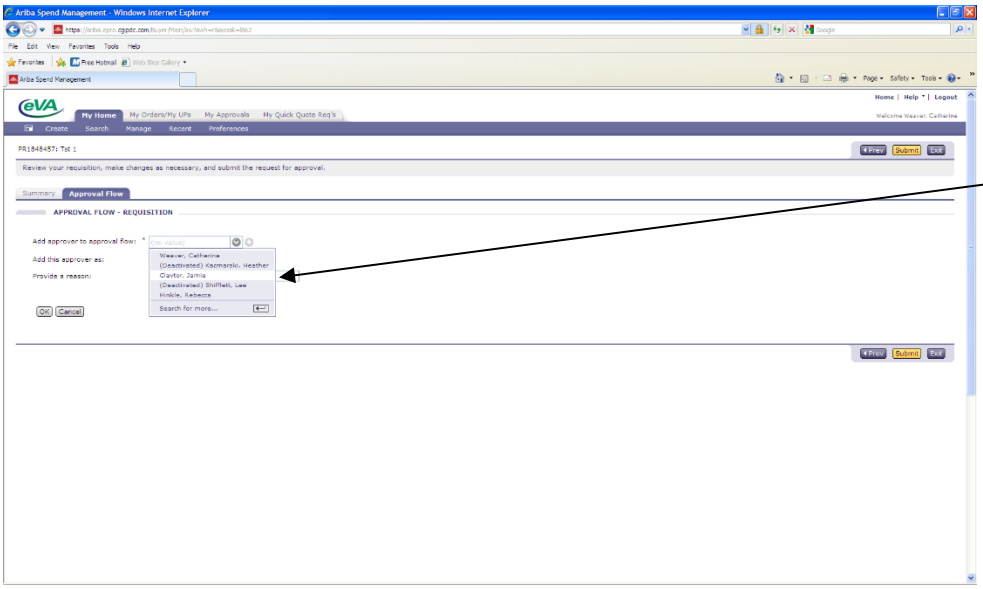
To add an approver click on the "**Approval Flow"** tab on the Checkout/Summary Page.



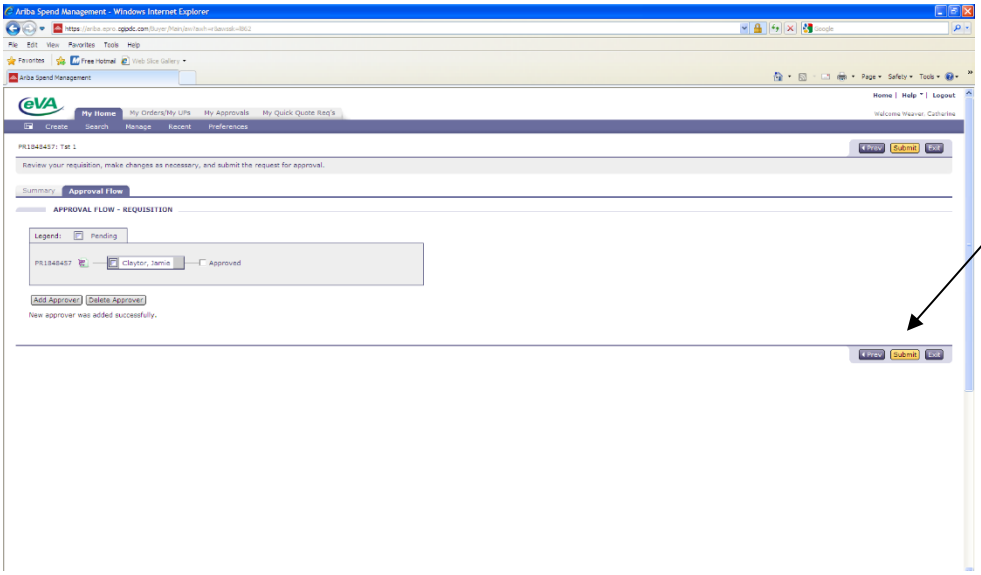
Click on "**Add Approver**."



Click on the drop down arrow to see the available list of approvers. You can select one from the list or if you don't see the user you are looking for click on "**Search for More**."



Once you have found the approver you want click on their name.



The approver will be added to the approval flow. You can continue to add additional approvers or click on "**Submit**" to submit the order.

Note: Please pay attention to Legend on the Approval Flow tab. When you come back to this page when checking the status of your order you can see the status of your approvals by keeping a watch on which ones are turn Green (Approved) or Red (Denied).

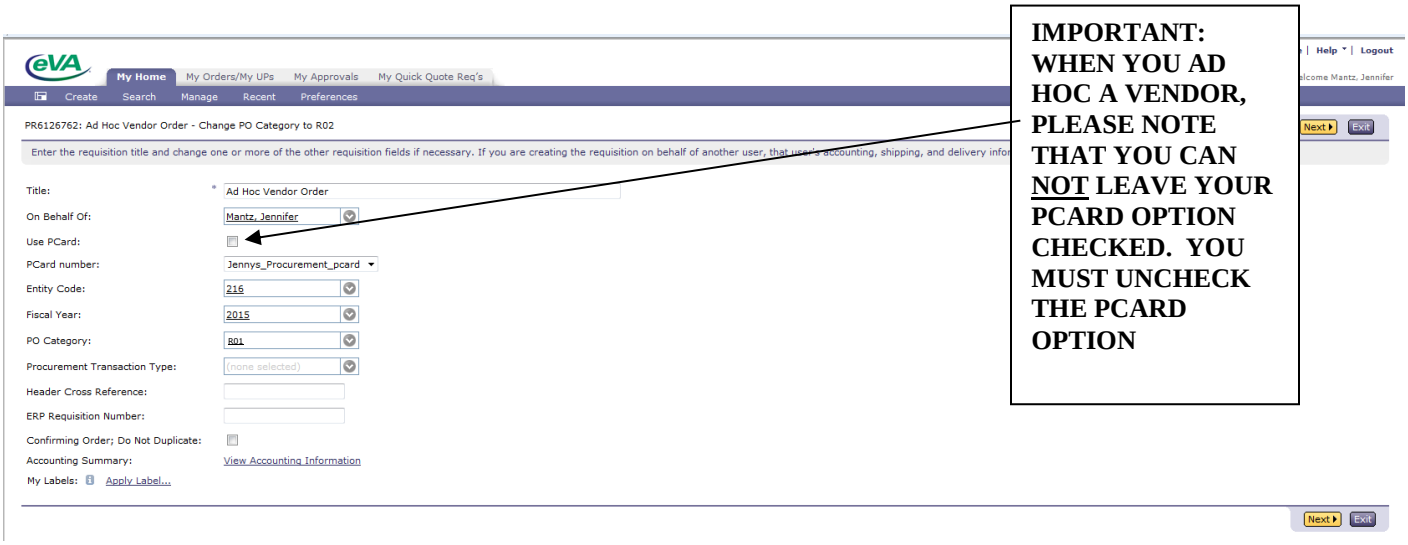
Tip: If your name appears at the end of the approval flow this is an indication that you need to approve the order and Fax or Mail it to the vendor. When it comes back to the person placing the order it typically means the vendor does not accept electronic orders. This is your reminder to send it to them hard copy. If you approve the order it will change from Submitted status to Ordered status.

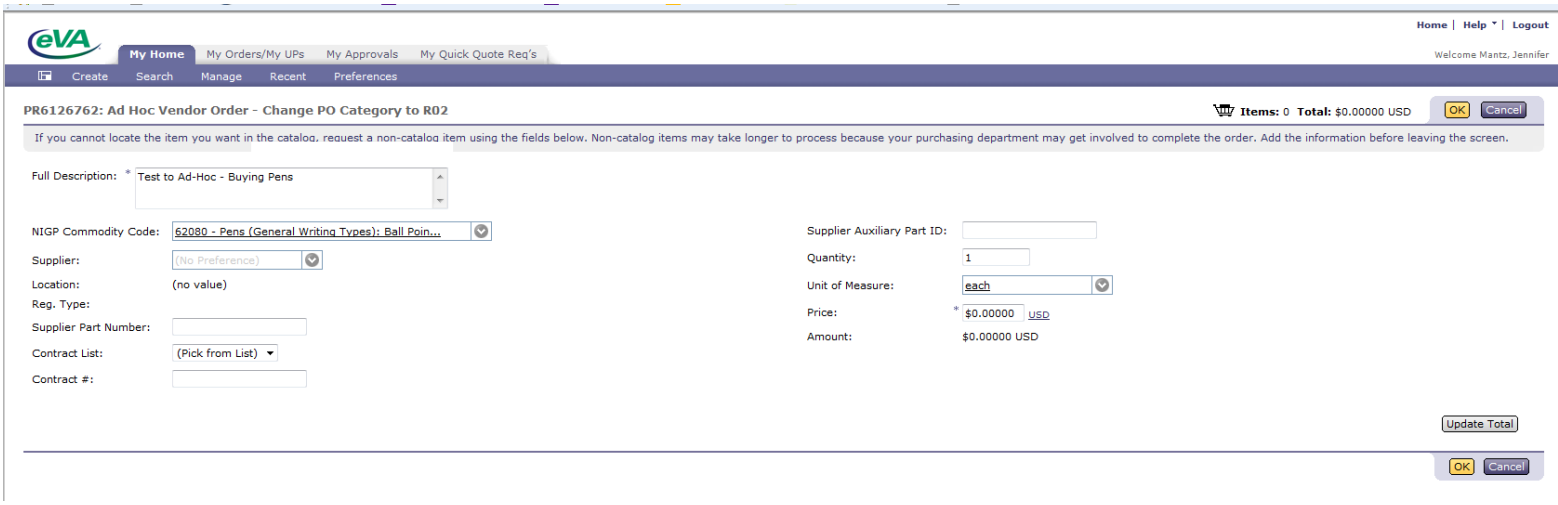
The approver you added will now show up in the Approval Flow.

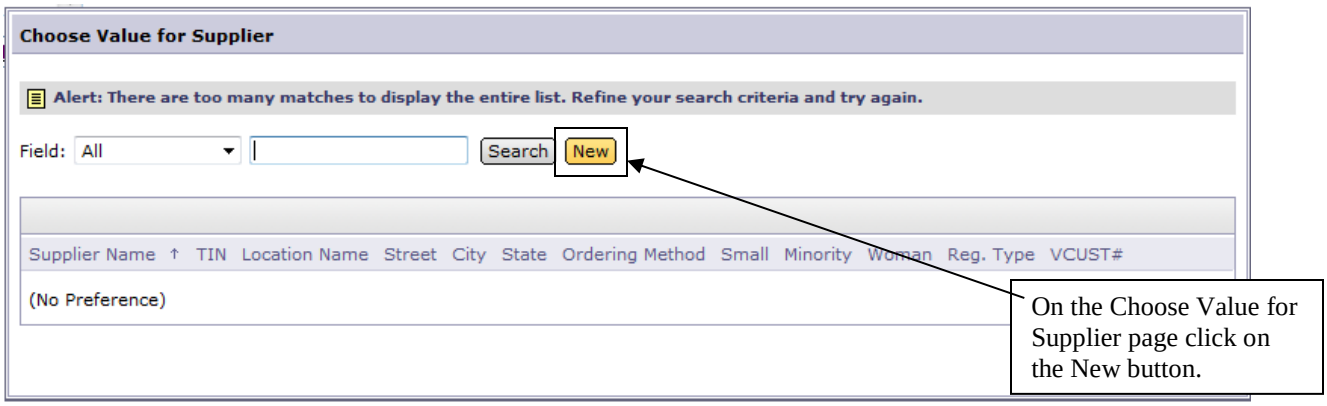
eVA Tip #0006 – How To Ad Hoc A Vendor

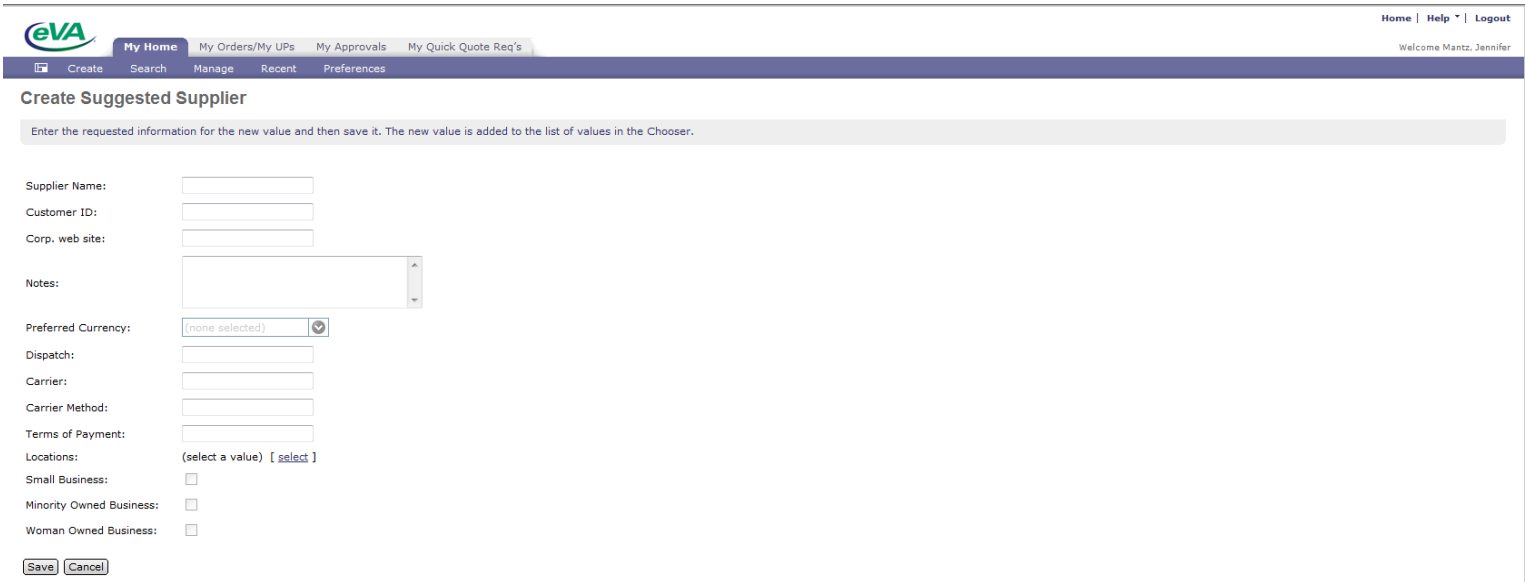
In eVA you can "Ad Hoc" a vendor that is not a registered eVA vendor. It is encouraged that you do everything possible to get the vendor registered.

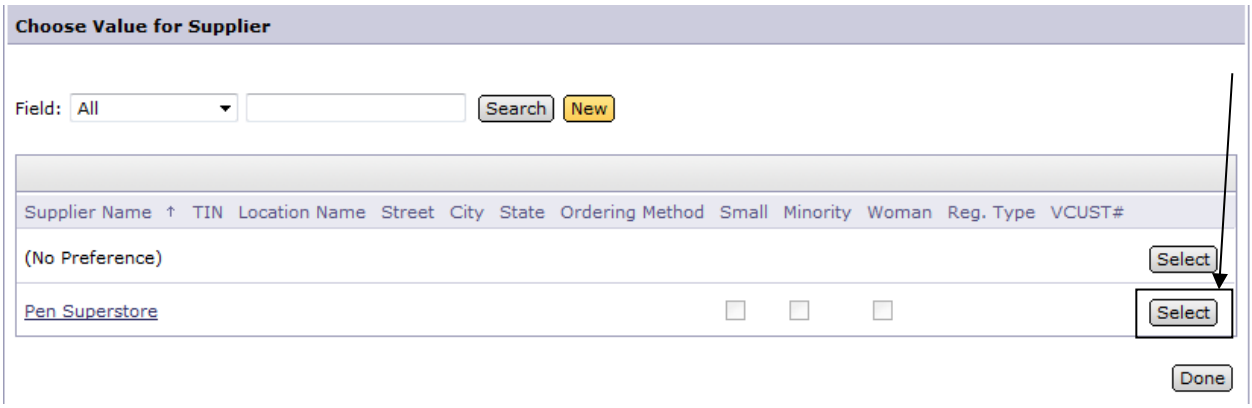
Before attempting to Ad Hoc a vendor you need to have all the vendor information (Name, Complete Address, Telephone Number, Contact Name, E-mail Address, and Federal ID Number).

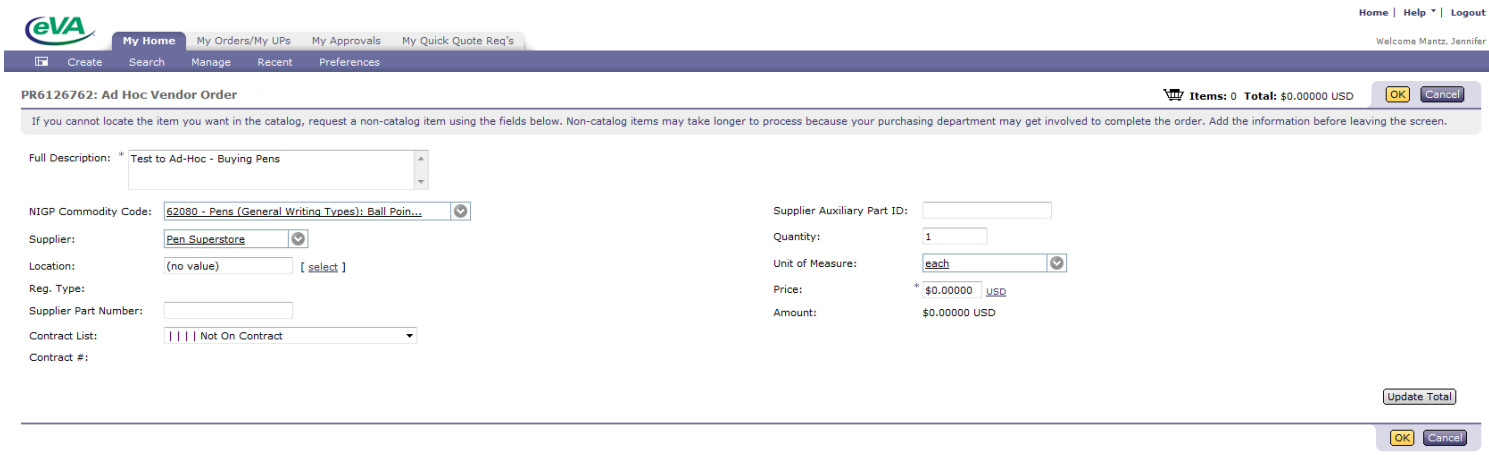





Choose Value for Supplier
Alert: There are too many matches to display the entire list. Refine your search criteria and try again.
Field: All
Search
New
Supplier Name ↑ TIN Location Name Street City State Ordering Method Small Minority Woman Reg. Type VCUST#
(No Preference)
On the Choose Value for Supplier page click on the New button.

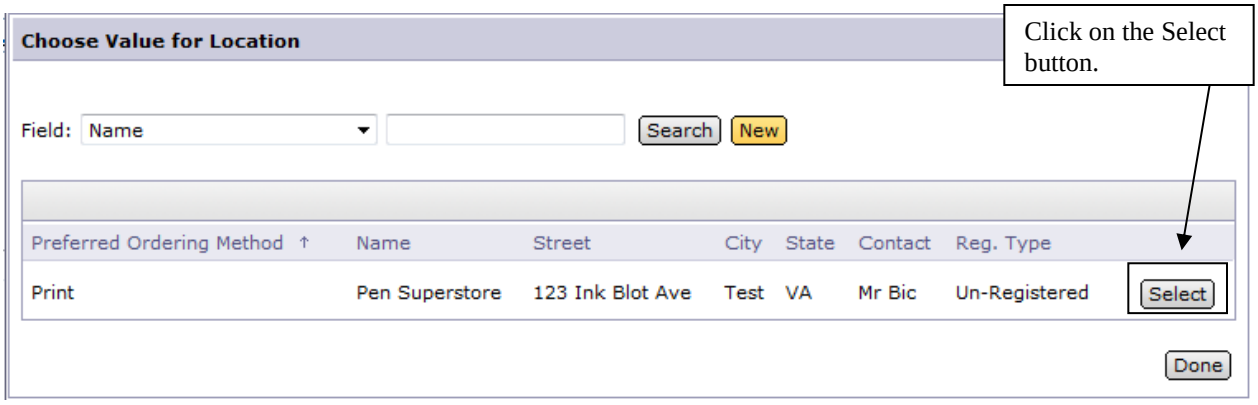

eVA
Home | Help | Logout
My Home
My Orders/My UPs
My Approvals
My Quick Quote Req's
Welcome Mantz, Jennifer
Create
Search
Manage
Recent
Preferences
Create Suggested Supplier
Enter the requested information for the new value and then save it. The new value is added to the list of values in the Chooser.
Supplier Name:
Customer ID:
Corp. web site:
Notes:
Preferred Currency:
(none selected)
Dispatch:
Carrier:
Carrier Method:
Terms of Payment:
Locations:
(select a value) [select]
Small Business:
Minority Owned Business:
Woman Owned Business:
Save
Cancel

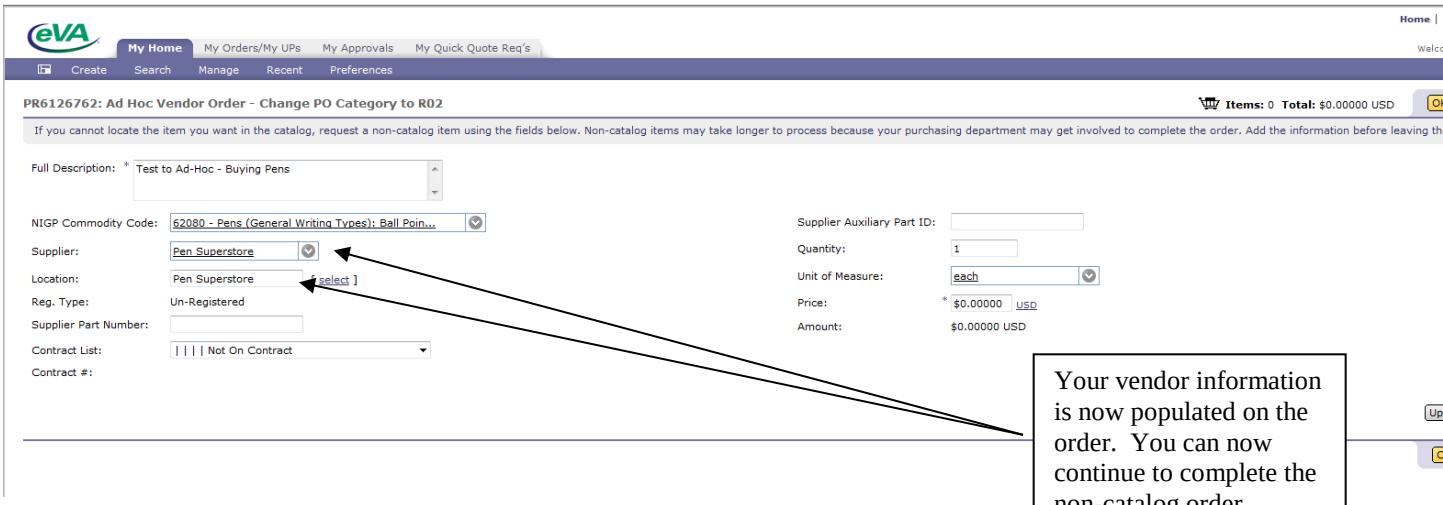

Choose Value for Supplier
Field: All
Search
New
Supplier Name ↑ TIN Location Name Street City State Ordering Method Small Minority Woman Reg. Type VCUST#
(No Preference)
Select
Pen Superstore
Select
Done


eVA
My Home
My Orders/My UPs
My Approvals
My Quick Quote Req's
Home | Help | Logout
Welcome Mantz, Jennifer
Create
Search
Manage
Recent
Preferences
PR6126762: Ad Hoc Vendor Order
Items: 0 Total: $0.00000 USD
OK
Cancel
If you cannot locate the item you want in the catalog, request a non-catalog item using the fields below. Non-catalog items may take longer to process because your purchasing department may get involved to complete the order. Add the information before leaving the screen.
Full Description: Test to Ad-Hoc - Buying Pens
NIGP Commodity Code: 62080 - Pens (General Writing Types): Ball Poin...
Supplier: Pen Superstore
Location: (no value) [select]
Reg. Type:
Supplier Part Number:
Contract List: | | | | Not On Contract
Contract #:
Supplier Auxiliary Part ID:
Quantity: 1
Unit of Measure: each
Price: $0.00000 USD
Amount: $0.00000 USD
Update Total
OK
Cancel

Choose Value for Location
Field: Name
Search
New
Preferred Ordering Method ↑ Name Street City State Contact Reg. Type
No items
Done

Home | Help | Logout
Welcome Mantz, Jennifer
My Home
My Orders/My UPs
My Approvals
My Quick Quote Req's
Create
Search
Manage
Recent
Preferences
Create Custom Location
Enter the requested information for the new value and then save it. The new value is added to the list of values in the Chooser.
Name:
Street:
City:
State:
Postal Code:
Country:
(none selected)
ID:
AD608080
Contact (Joe Smith):
Email Address:
Phone:
Fax:
Tax Id Number (TIN):
Tax Id Number Type:
(no value)
DUNS Number:
Organization Type:
(no value)
LL Company (LLC):
(no value)
Reg. Type:
Un-Registered
Vendor Location Id Number:
Preferred Ordering Method:
Print
Save
Cancel
Enter in all the information that has an asterisk (*) beside of the field. After entering the information click on Save at the bottom of the screen.
Note: You must have the entire address, contact information, and the Federal ID

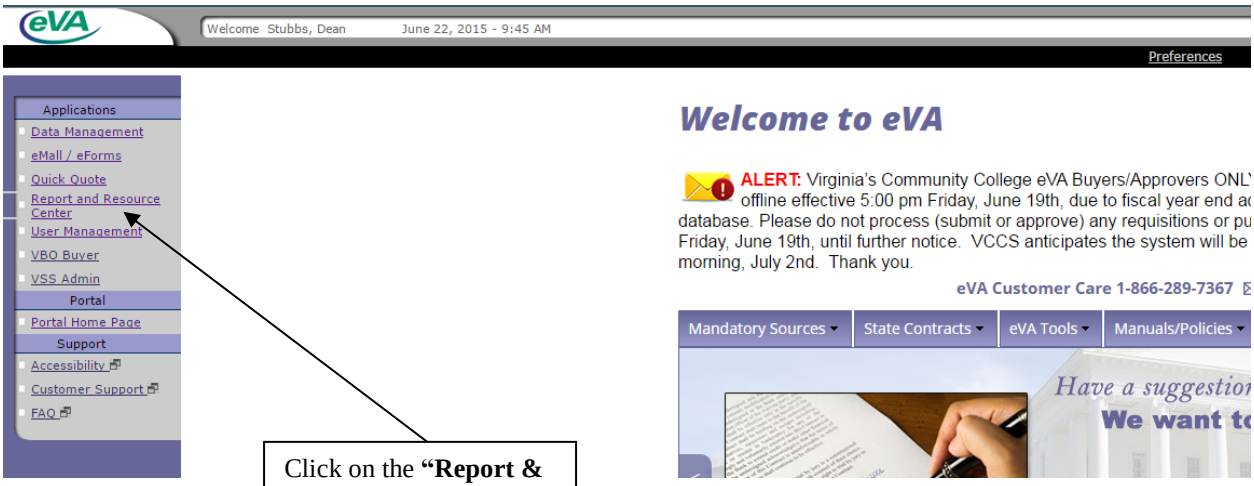

Choose Value for Location
Field:
Name
Search
New
Preferred Ordering Method
Name
Street
City
State
Contact
Reg. Type
Print
Pen Superstore
123 Ink Blot Ave
Test
VA
Mr Bic
Un-Registered
Select
Done
Click on the Select button.


My Home
My Orders/My UPs
My Approvals
My Quick Quote Req's
Create
Search
Manage
Recent
Preferences
PR6126762: Ad Hoc Vendor Order - Change PO Category to R02
Items: 0 Total: $0.00000 USD
If you cannot locate the item you want in the catalog, request a non-catalog item using the fields below. Non-catalog items may take longer to process because your purchasing department may get involved to complete the order. Add the information before leaving th
Full Description:
Test to Ad-Hoc - Buying Pens
NIGP Commodity Code:
62080 - Pens (General Writing Types): Ball Poin...
Supplier:
Pen Superstore
Location:
Pen Superstore
[select]
Reg. Type:
Un-Registered
Supplier Part Number:
Contract List:
| | | | Not On Contract
Contract #:
Supplier Auxiliary Part ID:
Quantity:
1
Unit of Measure:
each
Price:
$0.00000
USD
Amount:
$0.00000 USD
Your vendor information is now populated on the order. You can now continue to complete the non-catalog order.

Note: A vendor that is set up in this manner does not stay in the system. If they do not become a registered vendor, and you choose to continue to use them, you will need to Ad Hoc them in this manner each time an order is placed. Also, when you Ad Hoc a vendor the last Approval in the system will be yours. You will need to approve the order before it will change to an Ordered status. This approval acts as your reminder to fax or mail a hard copy of the DO to the vendor. An Ad-Hoc vendor does not receive electronic orders through the eVA system.

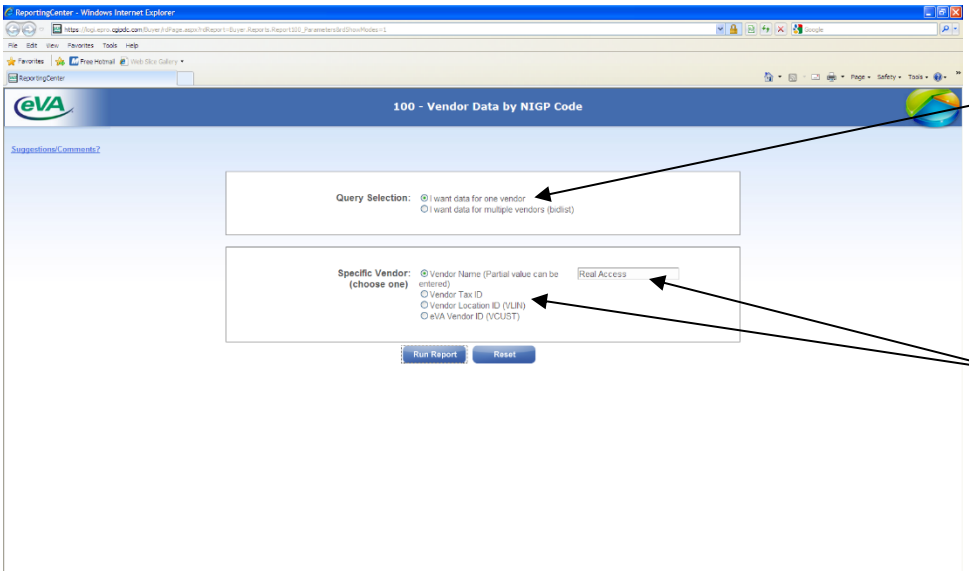
eVA Tip #0007 – Locating Vendor's Commodity Code Information

In eVA you can find a vendor's commodity code listing.



Click on the **"Report & Resource Center"** link from the Portal Home Page.

Click on "**101 General Vendor Information**" and then click on "**Open**".

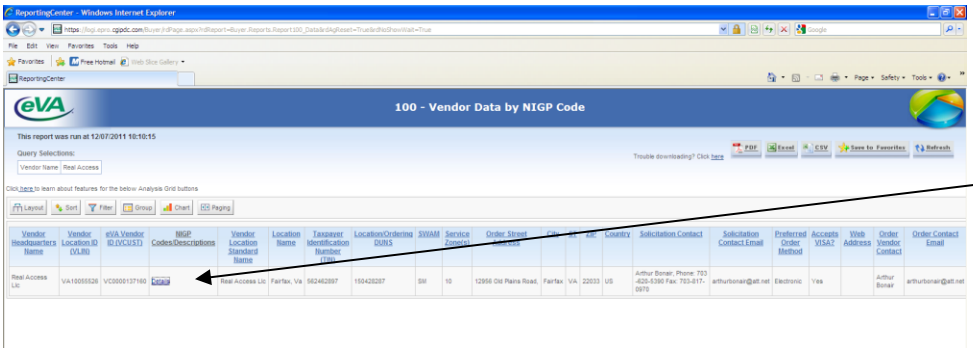


In the first box that appears on the screen click the button for "**I want data for one vendor**."

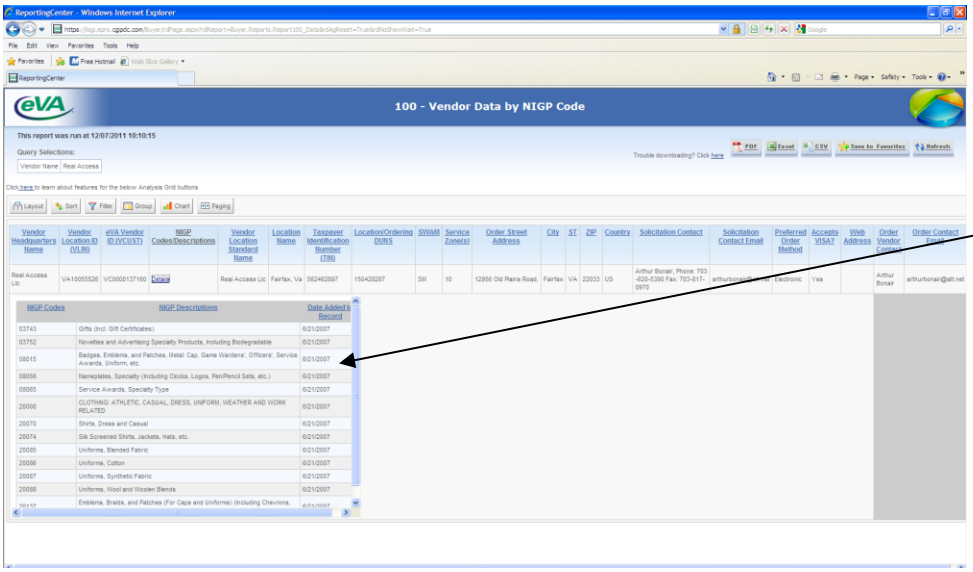
When the second box appears click on the button that is appropriate for the information you have. Then type in the information.

In this example we selected Vendor Name and we entered "Real Access" into the Vendor Name Field.

Finally, click on "**Run Report.**"



Information about the vendor will appear. Click on the details link to see what commodities the vendor signed up for in eVA.



Information will appear for the vendor entered.

Find the Commodity Code that seems to fit the description of what you are looking for. Note the commodity code number.

eVA Tip #0008 - Procedures for Submitting Blanket Direct Orders in eVA

Definition of eVA EP Blanket Orders: Requisitions and subsequent direct orders created in the eVA Procurement System that represent a lump sum dollar amount that is a total of present and future purchases to one vendor during a fixed period of time.

Rules/Guidelines for Processing Blanket Orders:

- Blanket Orders must ***not*** be processed for more than $4999.99 in total.
- Blanket Orders must be created with a specific time frame specified in the description for purchase period (Example: 1/1/16 – 5/31/16) and shouldn't cross fiscal years.
- Item description must clearly state that purchase order is a blanket order and the dates by which purchases must be made by (see example below).

Processing Blanket Orders:

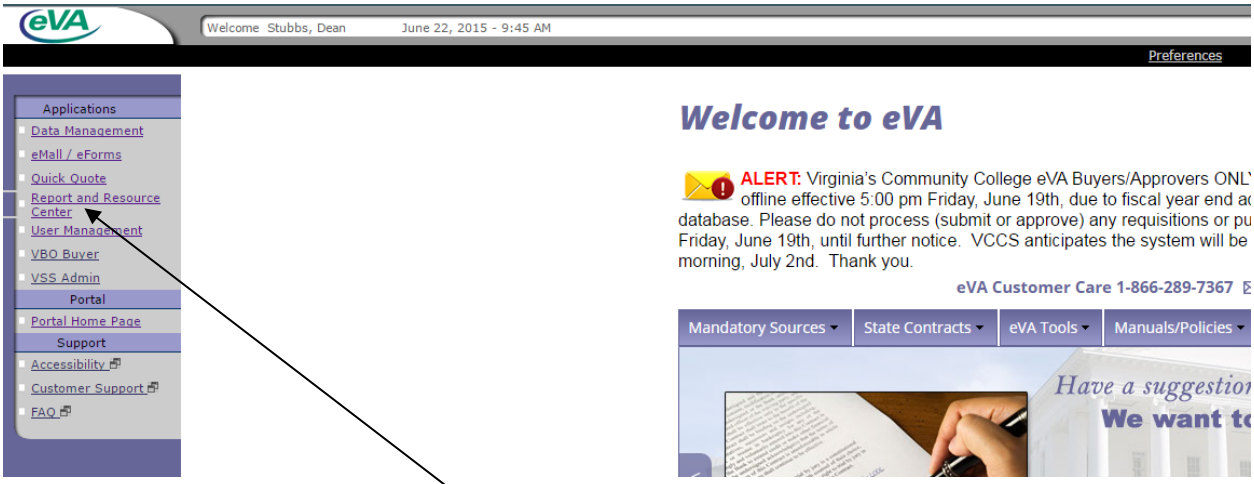
- Contact vendor prior to placing blanket orders to be sure this will be acceptable to the vendor. **Note:** Registered eVA vendors will be charged 1% of the total of the blanket order.
- For reconciliation purposes, blanket orders must not cross over fiscal years. Dates specified should take into account fiscal year cut off deadlines (suggestion, cut off blanket orders on 5/31/16 for the 6/30/16 fiscal year end)
- Do not over estimate the amount on a blanket order; make every attempt to create blanket orders in amounts that will be used.
- An amount of $500.00 or more not used on a blanket order will require a change order be created to decrease the dollar amount available on the blanket order. This will ensure the vendor gets credited for the 1% transaction fee previously paid on the overage amount.

Processing Payments/Invoices Against Blanket Orders:

- Department will submit a statement noting the date, current payment, and balance left on the Blanket Order to Accounts Payable for **each** invoice submitted. This statement must be clear and legible.

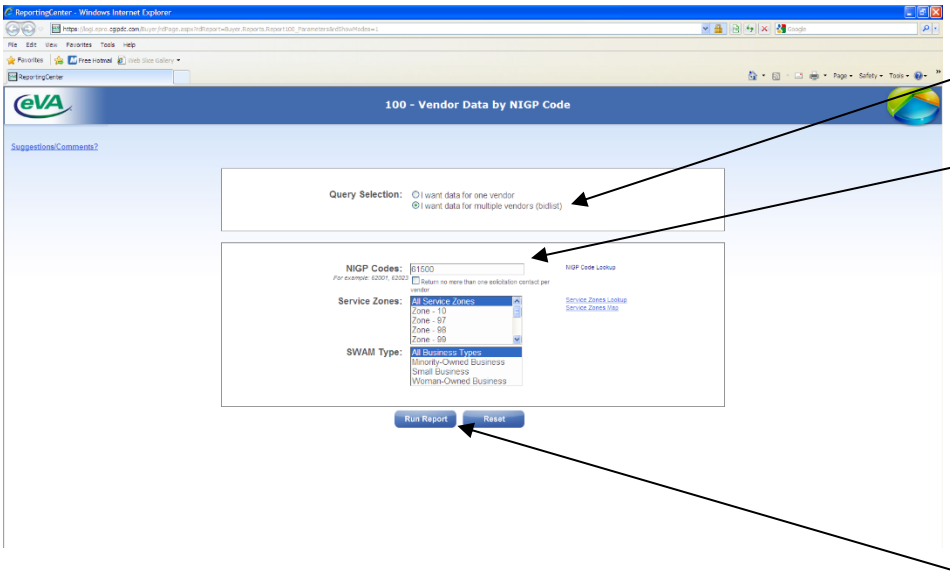
eVA Tip #0009 – Bidders List Report For SWaM Vendors

In eVA you can find a SWaM vendor by NIGP Code by using the Bidders List report.



Click on the **"Report & Resource Center"** link from the Portal Home Page.

Click on "**101 General Vendor Information**" and then click on "**Open**".

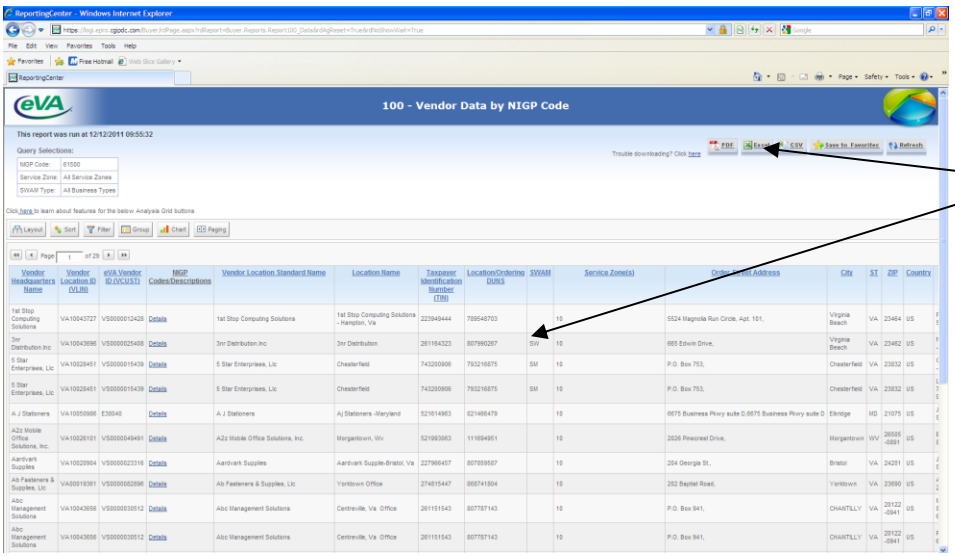


In the first box that appears, click on "**I want data for multiple vendors**."

Then type in the NIGP code you are interested in finding vendors for or search for one using the NIGP Code Search feature.

Other selections can be made if you wish to narrow results by service zones or SWaM type.

Click "**Run Report**"



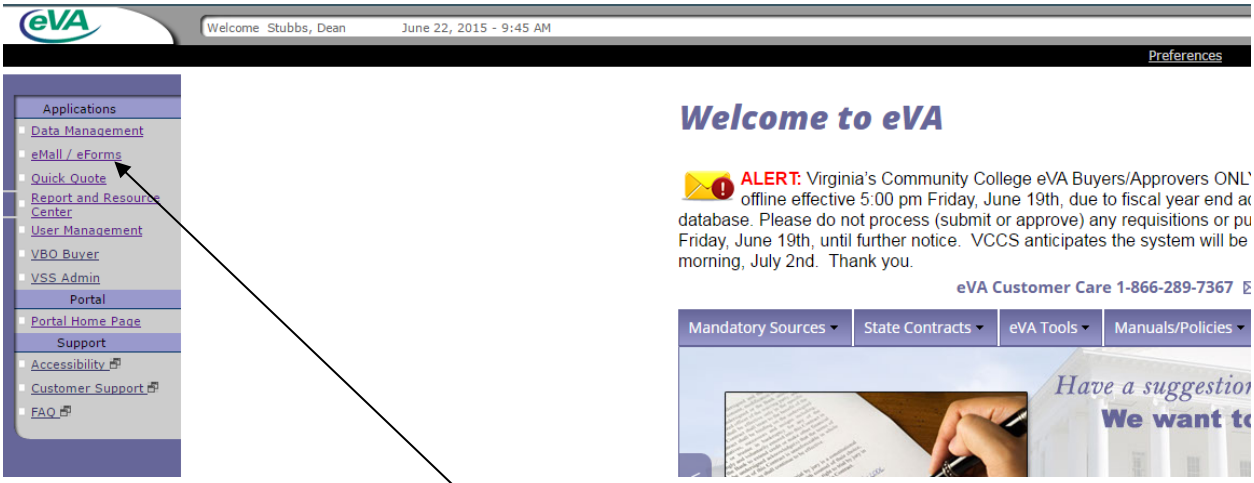
The report can be reviewed on the existing screen or it can be downloaded to Excel for sorting and manipulation.

eVA Tip #0010 – How to Find a Labeled Item

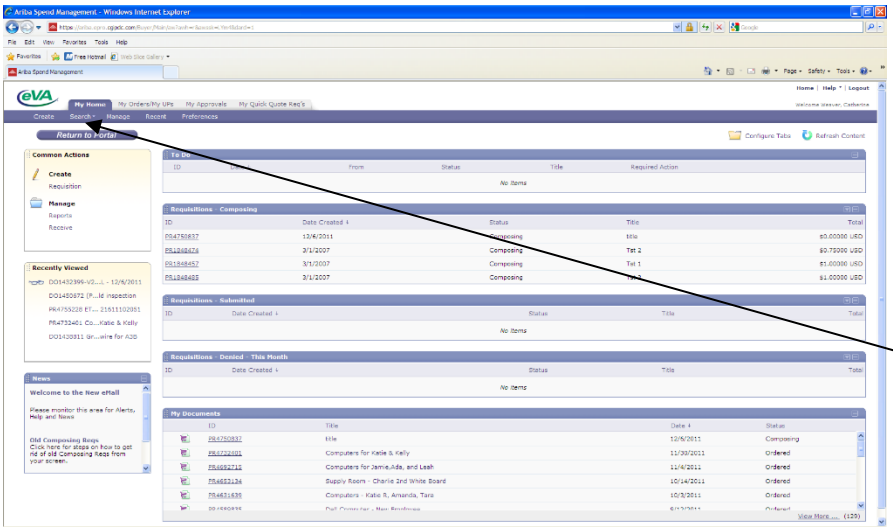
In eVA you can apply labels to organize your orders just like you can create folders to organize paperwork in your desk drawer. A label can be applied to a requisition (PR) and/or to an order (EP or PCO). Multiple labels can be applied to the same document. Labels can be applied to a document from a variety of locations; there is no right or wrong method – just personal preference.

Once you have applied a label you need to know where to find your labels so that you can locate specific requisitions or orders.

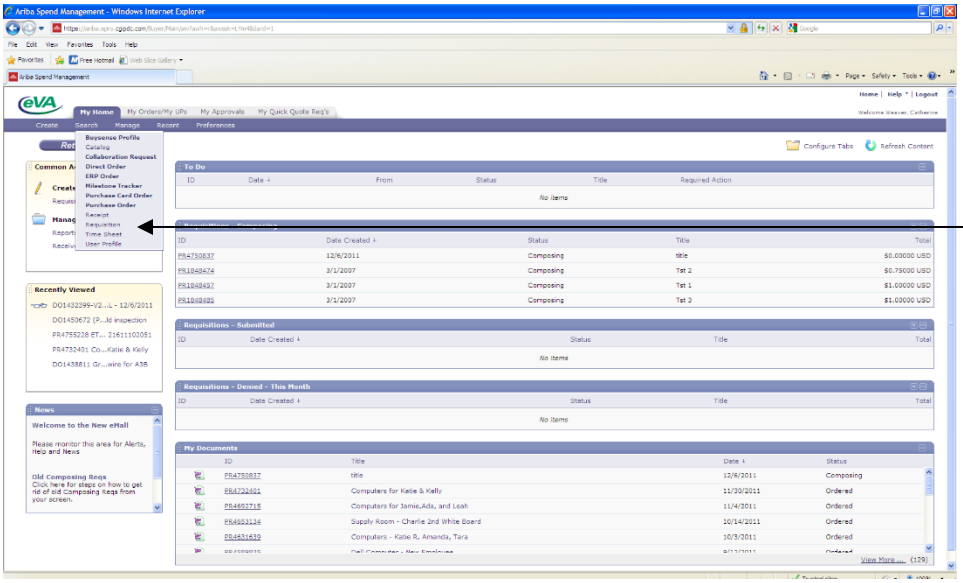
Finding a Label



Click on "**eMall / eForms**."

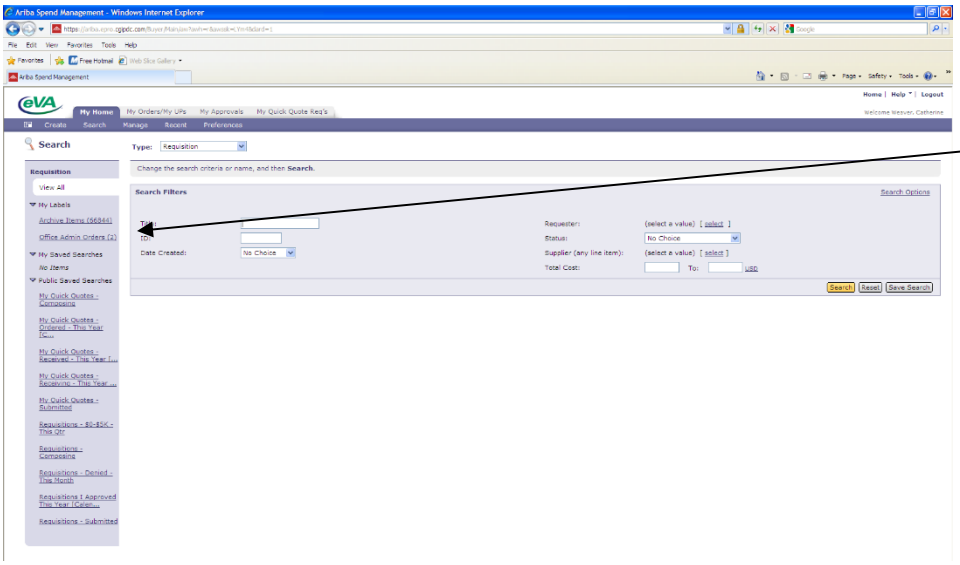


Click on "**Search**"



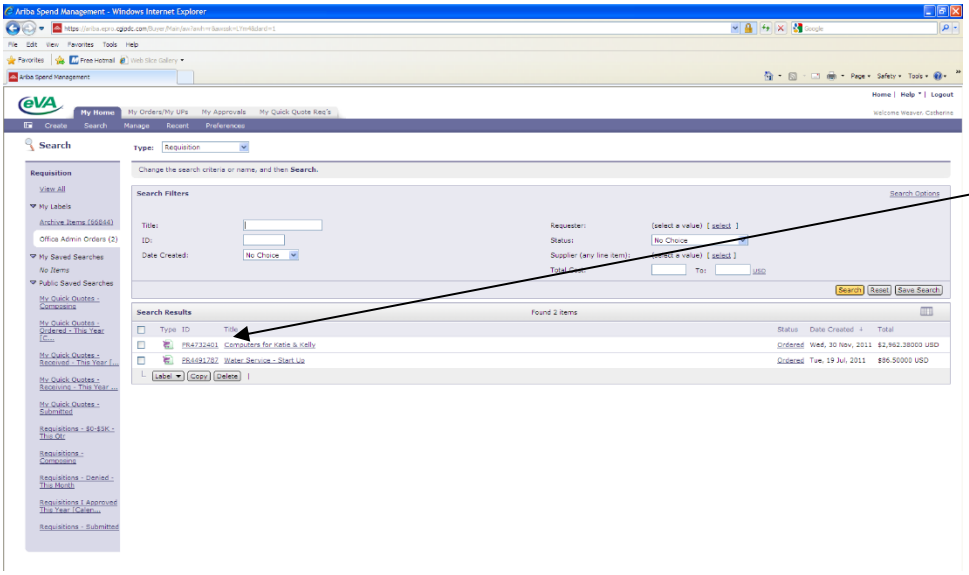
When the drop down box appears, click on the type of item you are looking for. A label can be applied to a requisition, EP, PCO, etc. and you have to click on the type that corresponds with the item you actually labeled.

In this example we will search for a label for requisitions.



Labels will appear in a list under the drop down navigation of "**My Labels**."

Click on the label link to see the documents associated with it.

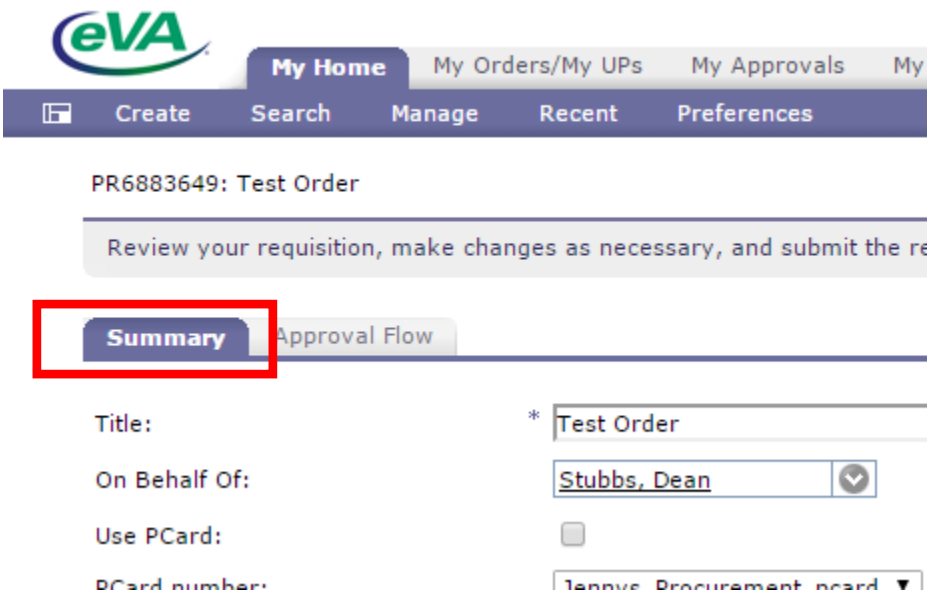


The screen will now show all documents associated with the label selected. By clicking on the document link you can see further information about that particular order or requisition.

NOTE: The date created defaults back to one year from the current day so if you are looking for an order placed over a year ago make sure to select "No Choice" in the "Date Created" dropdown menu.

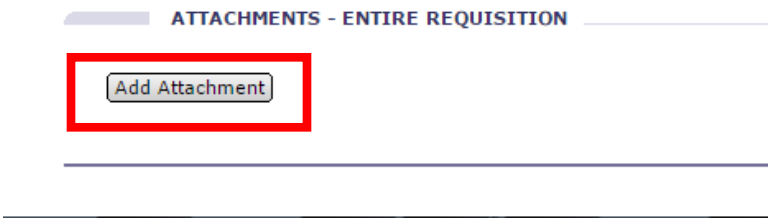
eVA Tip #0011 – Adding and Deleting Attachments to an Order in eVA

1.) To add an attachment to your whole order, navigate to the Summary menu

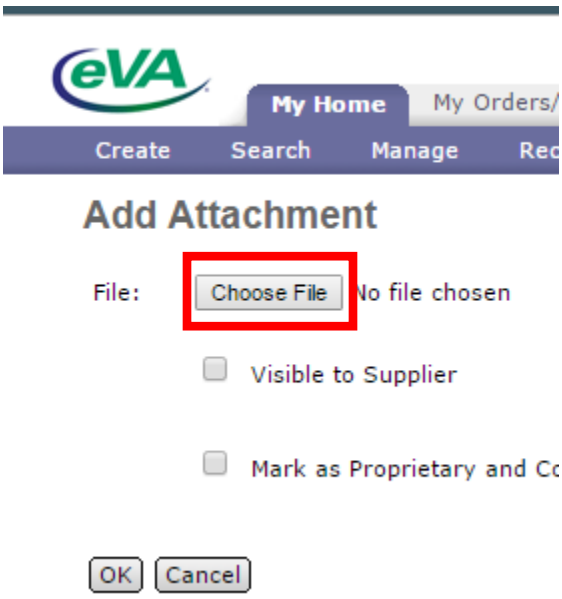


2.) Once on the Summary menu you will scroll down to the very bottom

3.) Click "Add Attachment"

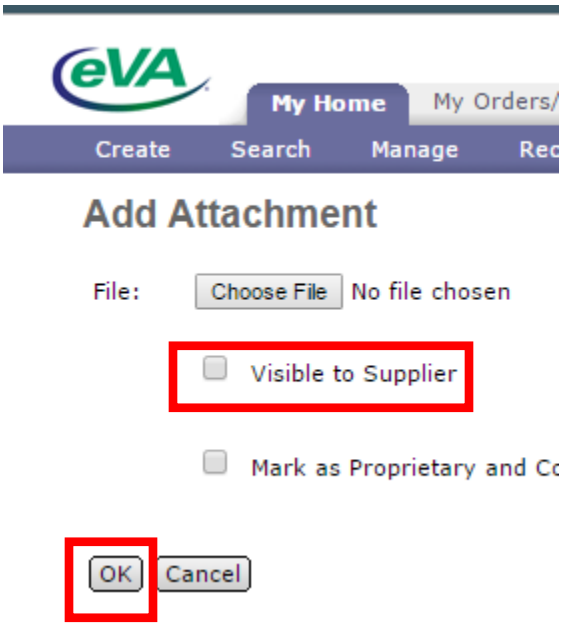


4.) On the Add Attachment menu you will click Choose File to pick a file from your computer that you want to attach to the order

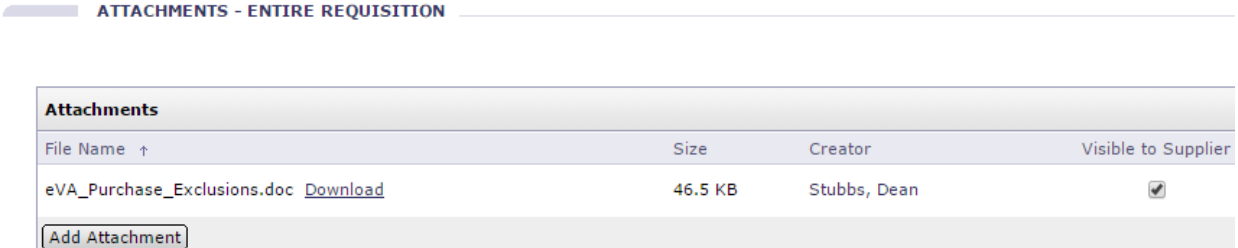


5.) If the vendor needs to see the attachment, make sure to check "Visible to Supplier."
   a. If the attachment needs to stay internal don't check "Visible to Supplier."

6.) Click on "OK' to finish adding your attachment



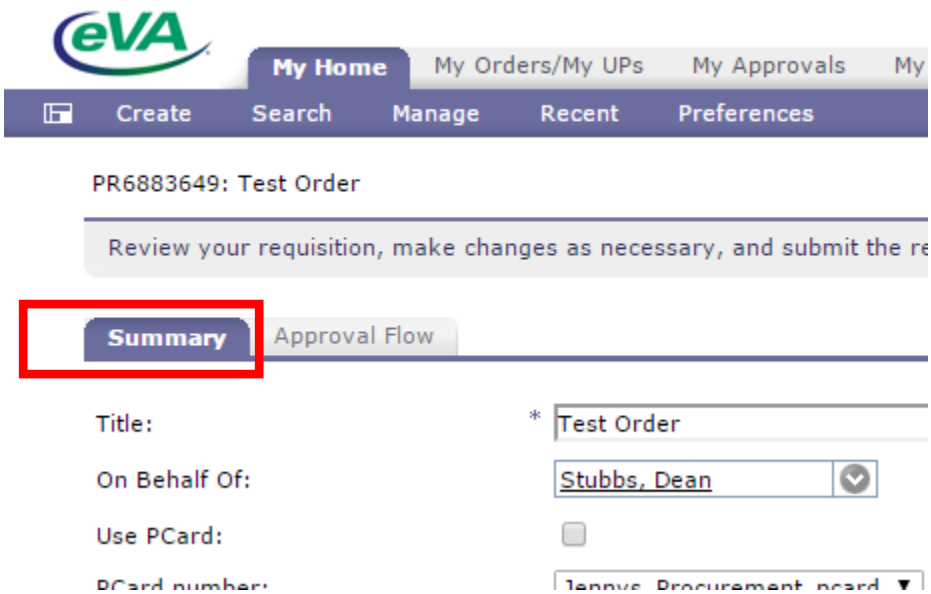
7.) You will be taken back to the Summary menu and your attachment will be listed at the very bottom under "Attachments"



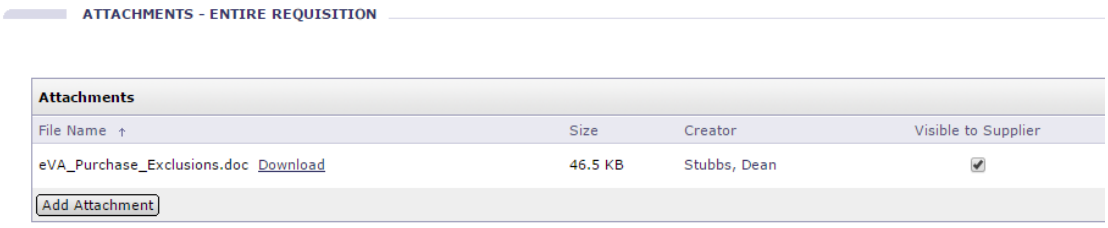
8.) If you need to add another attachment click on “Add Attachment” and complete the same process as above

Deleting an Attachment

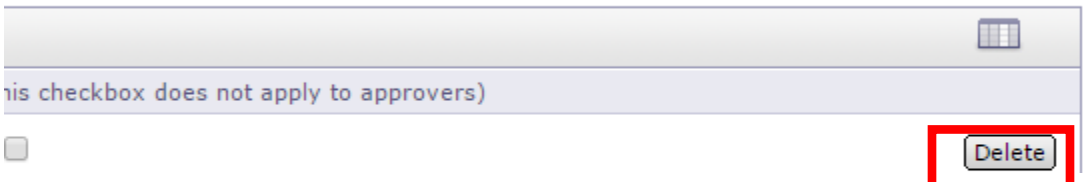
1.) To delete an attachment from your whole order you will navigate to the Summary menu



2.) Once on the Summary menu you will scroll down to the very bottom



3.) To the right of the attachment you want to delete Click on “Delete”



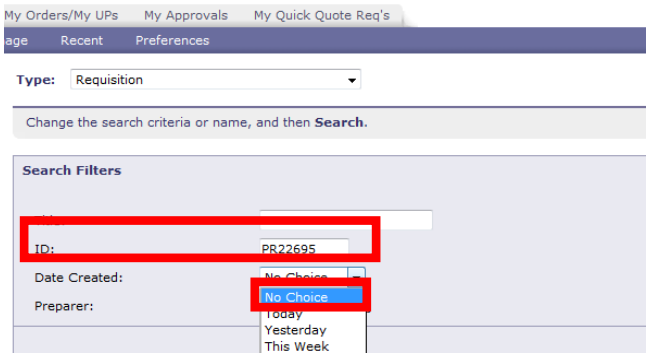
4.) If you need to delete another attachment follow the same process as above

eVA Tip #0012 – How to do Change Orders in eVA

1. Login to eVA
2. While in the Knowledge Center click on "eMall / eForms"
3. From the My Home page scroll down until you see "My Documents"

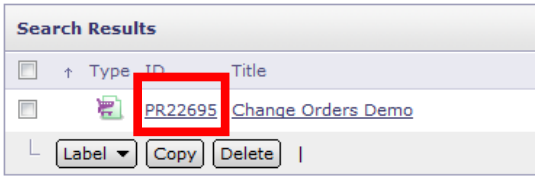
4. At the bottom of the My Documents click "View More" and then click "Requisition"

5. On the Search page all of the documents for the current date to that date last year will display.
    a. Enter the PR number that corresponds to the PCO or EP in the ID field
    b. Change the "Date Created" click the dropdown and change "Custom" to No Choice



6. Click "Search"

7. Click on the PR number
    a. If you have started making changes to the order already you will see the PR listed twice. The second version will display the same PR number but with a "-V2" at the end of it. Make sure to select the version with the highest number.



8. The PR will load

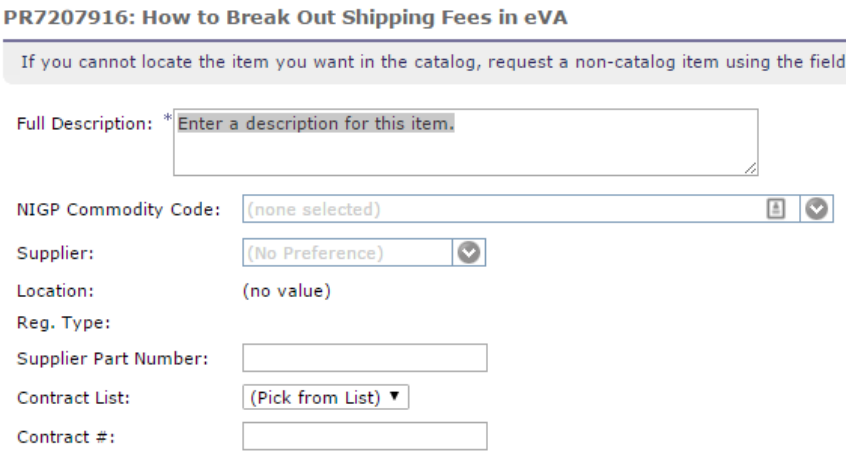
9. At the center of the screen you will see a combination of the following options depending on what status your order is in.

    a. If you need to make a change, click "Change"
    b. If you need to cancel the order, click "Cancel"

eVA Tip #0013 – How to Break Out Shipping Fees in eVA

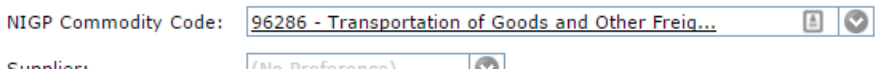
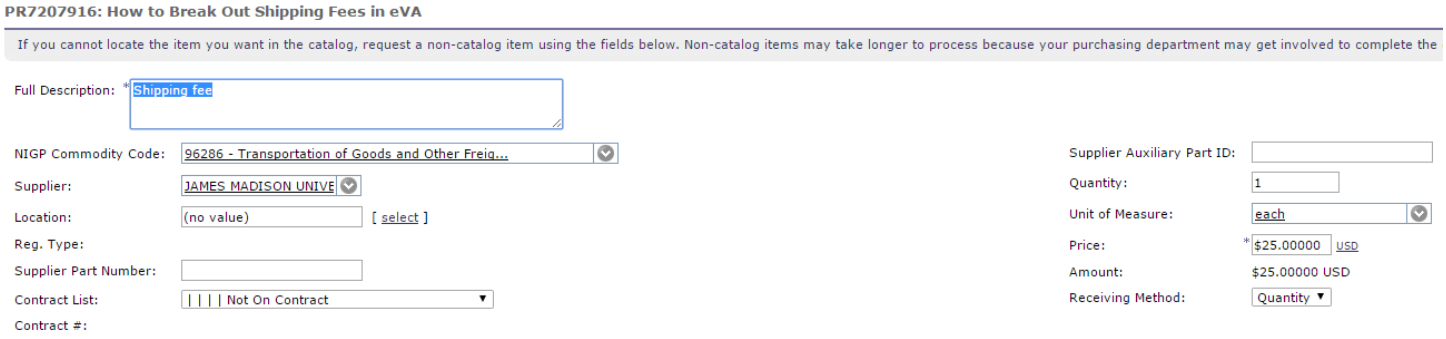
1. Login to eVA
2. While in the Knowledge Center click on “eMall / eForms”
3. From the My Home page click on “Requisition”
4. On the next screen fill in the information as it applies to the requisition you are making
5. Once the next screen loads click on “Create Non-Catalog Item”

6. You will be taken to this screen



7. In the Full Description box you will type something like “Shipping fee.”

8. In the NIGP Commodity Code box you will enter: 96286



9. From there you can finish filling out your requisition