



New eVA Transition Guide

Version 2.0

Updated December 14, 2022

JMU Procurement Services

**Need eVA Help?
Contact Us!**

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**Procurement
Services**



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New eVA Overview

In 2019, the Commonwealth of Virginia began the process of soliciting for a new eProcurement system. Through that process, a contract was awarded to CGI who proposed moving to a new platform called Ivalua. This new platform, launching November 1st 2022, will bring modernization to eVA. As with any system change, there are significant changes specifically around the look and feel of eVA along with some business processes. Procurement Service's commitment to helping our end users remains steadfast. This guide is designed to assist those who used the previous eVA platform transition to using the new Ivalua platform.

Changes as a Result of the New Platform

Some changes within the system are purely cosmetic. Other changes will impact the business processes you are familiar with. Below is information about the changes you should be aware of.

SPCC converted from previous eVA

If your SPCC was loaded into eVA prior to November 1st 2022, then it converted and is ready for use in New eVA.

SPCC no longer defaulted to "Use Pcard"

When creating a requisition, you will now need to manually select when you want to use your SPCC, as it is no longer defaulted to be used. See [How to add or remove a SPCC onto a requisition](#) for details on this process.

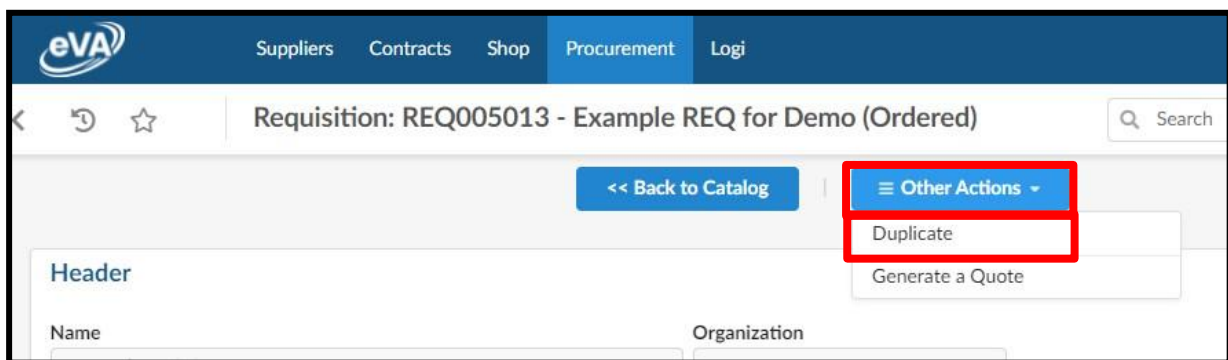
SPCC no longer can be edited

You can no longer edit a SPCC's information, such as expiration date, after it has been added to your eVA profile. If you need to modify the card you must delete it and then re-add it. Any SPCC changes in your profile happen immediately. See [How to update and remove your SPCC](#) for details on this process.

"Copy" now called "Duplicate"

To copy an order, you will now select **Duplicate** from the Requisition

1. From the Requisition you want to copy, click **Other Actions**
2. In the menu that displays, click **Duplicate**



3. A pop-up message will ask **Duplicate?**, click **OK**



4. The duplicated requisition will display, and you will make any necessary changes and submit as normal

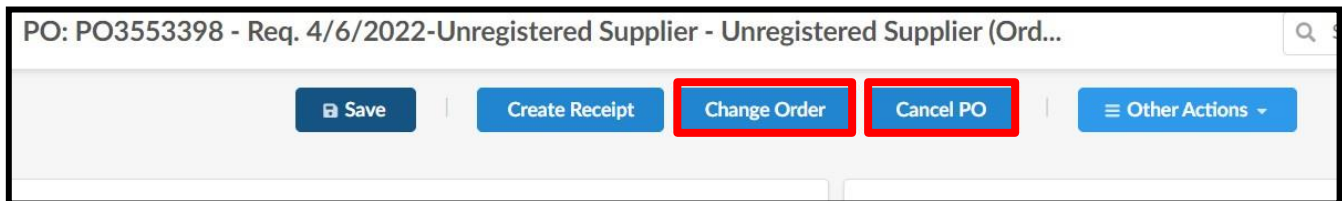
Prefixes on purchase orders and requisitions

Although purchase orders from the last two years will be converted into the new platform, those converted purchase orders will be renumbered and some will have new prefixes. See table below for specifics.

Item Type	Previous eVA	New eVA	Notes
Non-SPCC Purchase Order	EP	PO	Orders that converted to the new platform (previous two years) will be assigned a new prefix and number. For example, EP9265381 will convert to PO0000132.
SPCC Purchase Order	PCO	PCO	Orders that converted to the new platform (previous two years) will be assigned a new number. For example, PCO9265379 will convert to PCO0000146.
Requisitions	PR	REQ	Requisitions that converted to the new platform (fully approved within the previous two years) will be assigned a new prefix and number. For example, PR782469 will convert to REQ0000764.

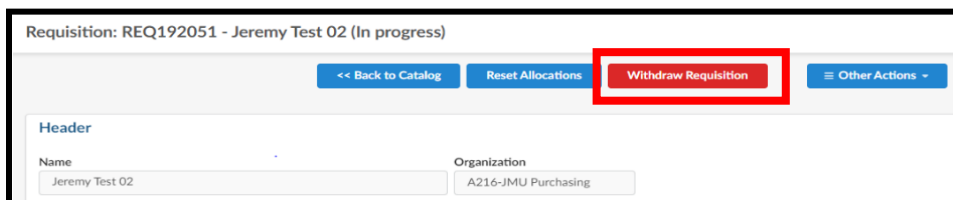
Options to change or cancel a purchase order moved

Previously in eVA you would go into the requisition to cancel or change a purchase order. In New eVA, both of these options are located within the purchase order, at the top center. Look for **Change Order** or **Cancel PO**.



Options to withdraw a purchase order

If you have submitted an order for approval that has not yet made it through the approval flow and you need to make changes to information in the order, the withdraw requisition button will allow you to edit the order before it moves on to the necessary approver.



Change order numbering

Converted Orders

In new eVA, a converted order from the old eVA system will be able to be edited through a change order. When creating a change order on a converted order from the old eVA system, it is important that you include the original order number in the title or in the Reference Number section. Every time an amendment is made to an order, including converted orders, a new REQ number will be created.

Header

Name* PO111111 Change Order - (Original Title) Organization* A216-JMU Purchasing

Type* Purchase PO Category* R01.- Routine

Requester* Good Jeremy Reference Number PO111111

Requisition

When creating a change order, the new requisition will not retain the existing number and add a version number at the end, i.e. REQ12345-V3. Rather, a new REQ number will be created and the previous purchase order version will be listed on the requisition header under **Order's amendment**.

Requisition: REQ005019 - Amendment request 3/11/2022 PO002984 (Ordered)

Change Order

Significant Change Request? No Yes

Amend# 1

Change Type(s) Description of Changes

Header

Name Amendment request 3/11/2022 PO002984 Organization A216-VP Academic Affairs

Type PO Category

Order's amendment

Original order : PO002984 - Copy of Example REQ for Demo- Dove Medical Supply, LLC
Amendment n°1 : PO002984-1 - Amendment request 3/11/2022 PO002984- Dove Medical Supply, LLC

Purchase Order (PO or PCO)

When creating a change order, the new PO or PCO will retain the previous purchase order number and a -# will be appended to the purchase order. For example, the original purchase order might be, PO002984, and the first change order would be numbered PO002984-1. The previous purchase order version will be listed on the requisition header under **Order's amendment**.

PO: PO002984 - Copy of Example REQ for Demo- Dove Medical Supply, LLC - Dove Medical Supply, LLC (Amended)

Close Save Other Actions

Header

Name Copy of Example REQ for Demo- Dove Medical Supply, ... Organization A216-VP Academic Affairs

Buyer Contact Order Date
Piker Doug 3/11/2022

Initial P.R. Internal Order
REQ005015-Copy of Example REQ for Demo

Order's amendment

Original order : PO002984 - Copy of Example REQ for Demo- Dove Medical Supply, LLC
Amendment n°1 : PO002984-1 - Amendment request 3/11/2022 PO002984- Dove Medical Supply, LLC

Ship to

JMU - Procurement Services
752 Ott St

Requisition comments – supplier section vs internal section

The New eVA platform no longer allows you to select a checkbox for a comment to be visible to supplier or internal only. Rather there is a dedicated area for supplier comments and a separate area for internal comments. This is true for both the header comments and line item comments.

Requisition attachments – supplier visible upload vs internal only upload

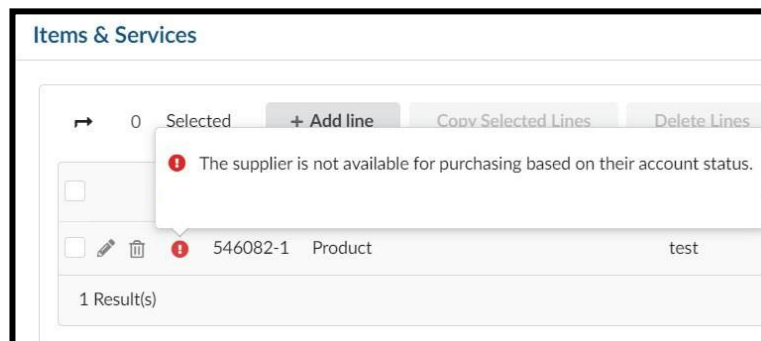
The New eVA platform no longer allows you to select a checkbox for an attachment to be visible to supplier or internal only. Rather when adding the attachment(s) you will need to select if it is an **Internal Attachment** or a **Supplier Document**, after that selection has been made you can't switch the visibility. You would need to delete, and then re-attach using the correct document visibility type. See [Adding Attachments to a Requisition](#) for details on this process.

PO print suppliers – reminder approval removed

If a supplier was state-entered, unregistered (ad hoc'd), or self-registered but not setup for electronic ordering and would have been a PO Print Vendor in eVA previously, you were added as an approver to your requisition at the very end as a reminder. In New eVA, that is not the case. You will need to ensure the supplier is setup for electronic ordering and that they have received your purchase order. When in doubt, verify with the supplier.

Blocking error messages

When creating a requisition, certain selections may result in a blocking error message. When this happens, the requisition cannot be submitted for approval and you must correct the error. For example, if you select a Deactivated supplier record, you will not be able to submit. This blocking error message will display with a red caution circle.



Challenges & Known Issues of the New Platform

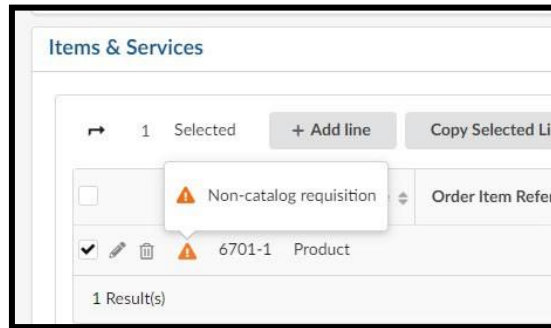
Vendors may not get your orders electronically

The New eVA platform removed the Ariba network where suppliers previously viewed your purchase orders and SPCC information, if supplied on the order. For now, if you do not get any form of confirmation from the vendor directly within one business day, we highly encourage you to confirm with the supplier that they did receive your purchase order.

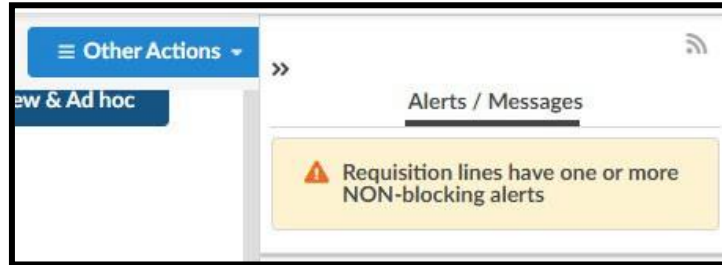
Non-catalog requisitions and purchase orders display a warning icon

When creating a non-catalog item, the requisition and purchase order will display a warning icon. eVA was unwilling to fix this issue, so departments can ignore this particular warning message. This warning will display in two different ways.

On the line item

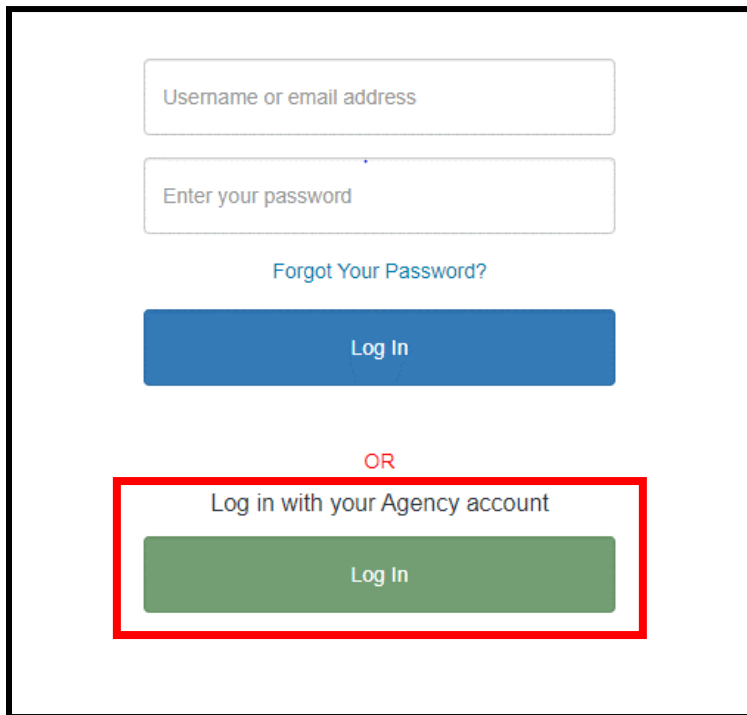


On the top right



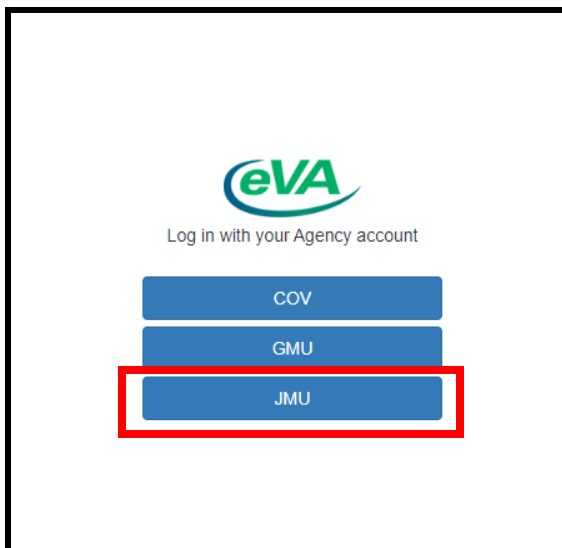
Signing into eVA

This process will remain unchanged, users can plan on using their eID and Password to Duo into the system.



The screenshot shows a login interface with two main sections. The top section contains a text input field labeled 'Username or email address', a second text input field labeled 'Enter your password', and a blue button labeled 'Log In'. Below this is a link that says 'Forgot Your Password?'. The bottom section is separated by the word 'OR' and contains a green button labeled 'Log In' under the heading 'Log in with your Agency account'. This entire bottom section is enclosed in a red rectangular box.

Click "Log In" underneath "Log in with your Agency account".



The screenshot shows the 'Log in with your Agency account' section of the eVA login page. It features the eVA logo at the top, followed by the text 'Log in with your Agency account'. Below this are three blue buttons labeled 'COV', 'GMU', and 'JMU'. The 'JMU' button is highlighted with a red rectangular box.

Click "JMU" from the listing of Universities

JAMES MADISON UNIVERSITY.

ATTENTION:

- Duo two-factor authentication is now required for this and many other JMU systems. See [here](#) for a complete list.
- If you have not yet enrolled with Duo, find instructions [here](#). For assistance, contact the IT Help Desk at 540-568-3555, or email helpdesk@jmu.edu

JMU eID
goodjp

Password

Log in

Protect Your Privacy!

Be sure to log out of this system by completely closing your web browser when finished. If you do not, someone else could use your web browser to login as you.

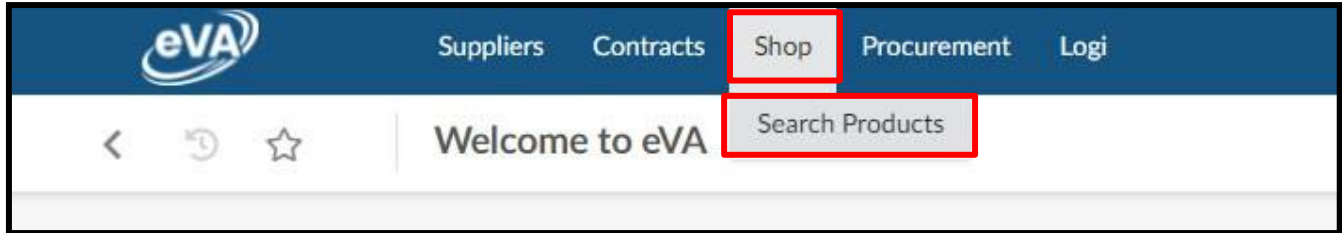
- Windows users: Close all web browser windows.
- Mac users: Quit your web browser

Login with your eID and Password, once you have you will receive a Duo push to finalize login.

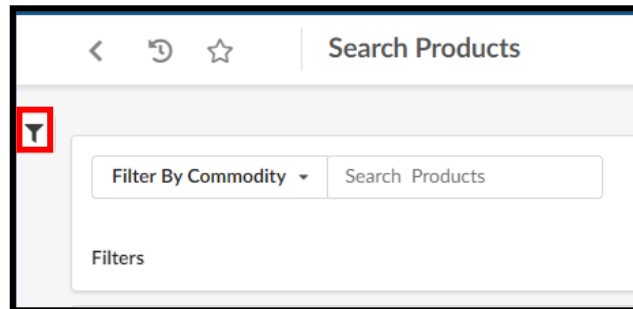
Creating a Punchout Catalog Order

This section covers the process to complete an order with a punchout catalog supplier. Please note that at this time, if you create a punchout catalog order and need to edit the order, eVA will not let you re-visit the punchout catalog. Instead you will need to delete/cancel the order and re-submit with the correct items.

1. Click **Shop** and then in the dropdown menu, click **Search Products**



2. Click the **Filter** Icon on the left-hand side



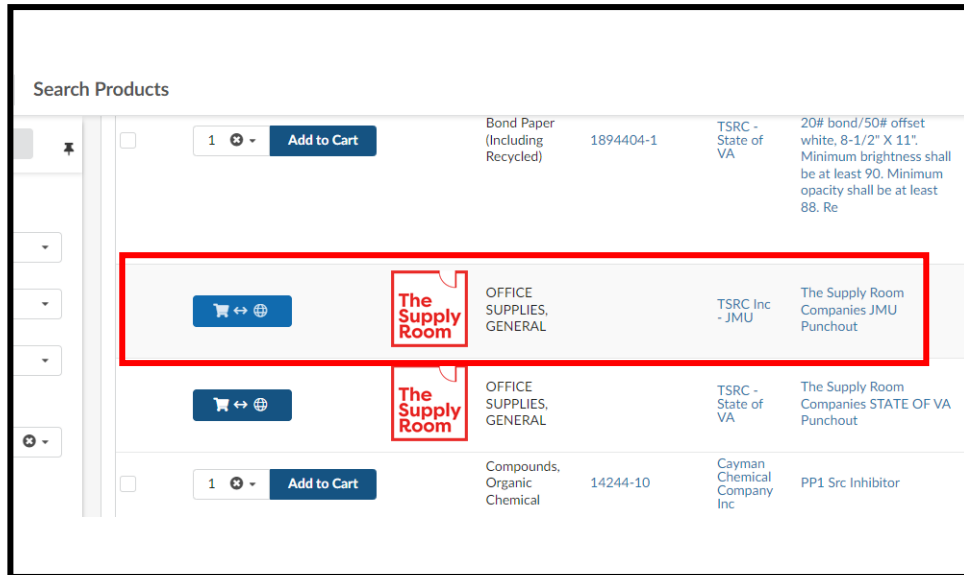
3. The Filter menu will expand out, click the checkbox next to **Punchout Only**, and then click **Search**

A screenshot of a filter menu. At the top, there is a search bar with a magnifying glass icon and the text 'Search', and a 'Reset' button. Below the search bar are several filter categories: 'Commodity' (dropdown), 'Contract' (dropdown), 'Supplier' (dropdown), 'Favorite Suppliers' (checkbox), 'Status' (dropdown), 'Display Options' (checkbox), 'Non-Approved Items' (checkbox), 'Generic Only' (checkbox), 'Punchout Only' (checkbox with a checkmark), 'Previously Purchased Items' (checkbox), and 'History Browse' (checkbox). The 'Punchout Only' checkbox is highlighted with a red box.

4. The screen will now display all the suppliers with punchout catalogs. You can either browse the listing, which will be several pages long, or you can search for a supplier by their name in the **Search Products** field.
- If utilizing the **Search Products** field, click **Search** after entering the supplier's name.

A screenshot of a search results page. At the top, there is a search bar with a magnifying glass icon and the text 'Search Products', and a 'Search' button. Below the search bar is a filter menu with a dropdown arrow and the text 'Filter By Commodity'. The 'Search Products' field is highlighted with a red box. Below the search bar is a 'Filters' section with 'Punchout Only: ✓ x'. Below the filters is a table with columns: 'Order', 'Image', 'Commodity', 'Product Code', and 'Supplier'. The table contains two rows of results. The first row shows 'ABRASIVES' from 'Department of General Services'. The second row shows 'Abrasives, Sandblasting (Other than Metal)' from 'Colonial Scientific Inc' with an image of a person in a hard hat.

5. Once you have found the punchout catalog for the supplier you need, click the **Shopping Cart / Globe Icon**. You will then be taken to the supplier's punchout catalog to shop as you normally would. **There are several punchout catalogs for bigger suppliers, please make sure you are choosing the JMU specific punchouts.**



6. Shop as normal on the supplier's website, and once finished submit or checkout your cart back to eVA.
7. Complete the **Header** information for the requisition.

Header

Name* Req. 10/18/2022	Organization* A216-JMU Purchasing
Type* Purchase	PO Category* R01 - Routine
Requester* Good Jeremy	Reference Number
Procurement Transaction Type* Supplies - Non-Technology	
Header Field 1 	Header Field 2
Status Draft	Workflow Preview & Ad hoc

8. Fill in the **Name** field (*this was previously the title field*)

Header

<p>Name*</p> <input style="width: 95%;" type="text" value="TSRC - Example Punchout Order"/>	<p>Organization*</p> <input style="width: 95%;" type="text" value="A216-VP Student Affairs"/>
<p>Type*</p> <input style="width: 95%;" type="text" value="Purchase"/>	<p>PO Category*</p> <input style="width: 95%;" type="text"/>
<p>Requester*</p> <input style="width: 95%;" type="text" value="Stubbs Dean"/>	<p>Reference Number</p> <input style="width: 95%;" type="text"/>

9. The **Organization** field will default to the appropriate selection based on your access in eVA

Header

<p>Name*</p> <input style="width: 95%;" type="text" value="TSRC - Example Punchout Order"/>	<p>Organization*</p> <input style="width: 95%;" type="text" value="A216-VP Student Affairs"/>
<p>Type*</p> <input style="width: 95%;" type="text" value="Purchase"/>	<p>PO Category*</p> <input style="width: 95%;" type="text"/>
<p>Requester*</p> <input style="width: 95%;" type="text" value="Stubbs Dean"/>	<p>Reference Number</p> <input style="width: 95%;" type="text"/>

10. The **Type** field will default to **Purchase**

Header

<p>Name*</p> <input style="width: 95%;" type="text" value="TSRC - Example Punchout Order"/>	<p>Organization*</p> <input style="width: 95%;" type="text" value="A216-VP Student Affairs"/>
<p>Type*</p> <input style="width: 95%;" type="text" value="Purchase"/>	<p>PO Category*</p> <input style="width: 95%;" type="text"/>
<p>Requester*</p> <input style="width: 95%;" type="text" value="Stubbs Dean"/>	<p>Reference Number</p> <input style="width: 95%;" type="text"/>

11. Select the dropdown arrow for **PO Category**, and click on the appropriate selection, typically **RO1 – Routine**

The screenshot shows a 'Header' section of a procurement system. It contains several fields with dropdown menus:

- Name***: TSRC - Example Punchout Order
- Organization***: A216-VP Student Affairs
- Type***: Purchase
- Requester***: Stubbs Dean
- Procurement Transaction Type***: Supplies - Non-Technology
- Status**: Draft
- PO Category***: A dropdown menu is open, showing a list of options: R01 - Routine, E01 - Emergency, P01 - Proprietary, S01 - Sole Source, VE1 - Technology - Emergency, and VP1 - Technology - Proprietary. The 'R01 - Routine' option is highlighted with a red box.

PO Category Refresher:

- E01 – Used for emergency procurements and requires approval from Procurement Services
- P01 – Do not use
- **R01** – Used for most all requisitions in eVA
- S01 – Used for situations in which a purchase is for a good that is truly a sole source and requires approval from Procurement Services
- VE1 – Do not use
- VP1 – Do not use
- VR1 – Do not use
- VS1 – Do not use
- **X02** – Used for situations in which a supplier is another government entity, such as a purchase from VCE, UVA, The State Department, etc. Also, when a purchase is an eVA exclusion but is being entered into eVA for transparency.

12. Select the dropdown arrow for **Procurement Transaction Type**, and click on the appropriate selection

The screenshot shows the 'Header' section of a requisition form. The 'Procurement Transaction Type' dropdown menu is open, showing the following options: Supplies - Non-Technology, Printing, Professional Services, Real Property, Supplies - Technology, and Surplus. The 'Supplies - Non-Technology' option is highlighted. Other fields include Name (TSRC - Example Punchout Order), Organization (A216-VP Student Affairs), Type (Purchase), PO Category (R01 - Routine), Requester (Stubbs Dean), Reference Number, and PO for eVA Billing Reference. A 'Workflow Preview & Ad hoc' button is visible.

13. After completing the required header fields, click **Save**
- If any of the required header fields have not been completed you will get an error message when attempting to save

The screenshot shows the 'Create Requisition' form. The 'Save' button is highlighted with a red box. A message states: 'Fields marked by an asterisk * are mandatory'. The 'Header' section is visible below.

14. Under **Items & Services** click on the appropriate checkbox
- A: This checkbox is used to select all line items. Use this when you want to set all line items to the same Department code and Account code.
 - B: This checkbox is used to select individual lines. Use this when you need to set the Department code and Account code on one or some of the line items.

The screenshot shows the 'Items & Services' interface. At the top, there are buttons for '+ Add line', 'Copy Selected Lines', 'Delete Lines', 'Edit Lines', and 'Set Allocations'. Below these is a table with columns: #, Product Type, Order Item Reference, Item Description, and Supplier. The table contains four rows of items. A red box labeled 'A' highlights the master checkbox at the top left of the table. Another red box labeled 'B' highlights the individual checkboxes for each row.

	#	Product Type	Order Item Reference	Item Description	Supplier
<input type="checkbox"/>					
<input type="checkbox"/>	2410-1	Product	60-RCHN-2PK	CareStart COVID OTC Rapid Antigen Test Ki...	(Colonial S
<input type="checkbox"/>	2410-2	Product	60-BNX-195-260	BinaxNOW COVID-19 Ag Card, ABBOTT, O...	(Colonial S
<input type="checkbox"/>	2410-3	Product	60-256066-BD	Analyzer, Veritor, BD, Point-of-Care Immuno...	(Colonial S
<input type="checkbox"/>	2410-4	Product	60-CLA-COV19AG-VIS	Clarity COVID-19 Antigen Rapid Test Kits, In...	(Colonial S

4 Result(s)

15. Click **Set Allocations** (*Formerly Accounting*)

The screenshot shows the 'Items & Services' interface with the 'Set Allocations' button highlighted in red. The table now shows all four items selected, indicated by checkmarks in the first column.

	#	Product Type	Order Item Reference	Item Description	Supplier
<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>	2410-1	Product	60-RCHN-2PK	CareStart COVID OTC Rapid Antigen Test Ki...	(Colonial S
<input checked="" type="checkbox"/>	2410-2	Product	60-BNX-195-260	BinaxNOW COVID-19 Ag Card, ABBOTT, O...	(Colonial S
<input checked="" type="checkbox"/>	2410-3	Product	60-256066-BD	Analyzer, Veritor, BD, Point-of-Care Immuno...	(Colonial S
<input checked="" type="checkbox"/>	2410-4	Product	60-CLA-COV19AG-VIS	Clarity COVID-19 Antigen Rapid Test Kits, In...	(Colonial S

4 Result(s)

16. The Set Allocations window will display, click **+ Allocation**

17. A new row will display allowing you to enter required allocation information.

18. In the % (Percentage) field enter the appropriate percentage
- If you are not using split line accounting, enter **100**
 - If you are using split line accounting, enter the appropriate percentage, and repeat step 16 to add more allocation rows. Remember the total allocation must equal 100 percent.
 - Note: Split accounting on the eVA PO is not required. eVA does not handle payment processes; actually splitting out charges to different orgs will occur within the SPCC Works Reconciliation or during invoice processing

19. You will now complete the other required allocation fields.
- Select the dropdown arrow for **Fiscal year** and click or type in the appropriate selection
 - Select the dropdown arrow for **Department** and click in the field and begin typing the department name or department number. The system will begin to populate available results that match. Once you find the correct department, click on the result in the listing to select it.
 - Select the dropdown arrow for **Account** and click in the field and begin typing the account code name or account code number. The system will begin to populate available results that match. Once you find the appropriate account code, click on the result in the listing to select it.

%	Fiscal year*	Department*	Account*	Acc. Cross Reference	Organization ⓘ*
100 %	2022 - eVA-Wide	100222 - Procurement	131200 - Office Supplies		A216-VP Student Affairs

20. At the top of the Set Allocations window, click **Apply & Close**

Set Allocations

Apply & Close Close

Allocations

21. You can now submit the requisition. At the top of the page, click **Submit for Approval**
- If the requisition is not within your expenditure authority, your approver will need to approve it.
 - In some situations, based on the items purchased or the dollar amount, the requisition may require approval from Procurement Services.

Requisition: REQ191874 - Req. 10/18/2022 (Draft)

Save Submit for Approval

Fields marked by an asterisk * are mandatory

Header

Name* Organization*

TSRC Punchout Order A216-JMU Pur

Creating a Non-Catalog Order

This section covers the process to complete a non-catalog order.

1. Click **Procurement** and then in the dropdown menu, click **Create Requisition**



2. Fill in the **Name** field (*this was previously the title field*). This field should be filled in with general details about what the order is for.

Header

Name* Non-Catalog Order	Organization* A216-Athletics
Type* Purchase	PO Category*

3. The **Organization** field will default to the appropriate selection based on your access in eVA

Header

Name* Non-Catalog Order	Organization* A216-Athletics
Type* Purchase	PO Category*

4. The **Type** field will default to **Purchase**

The screenshot shows a form titled "Header" with the following fields:

- Name***: Non-Catalog Order
- Organization***: A216-Athletics
- Type***: Purchase (highlighted with a red box)
- PO Category***: (empty dropdown)

5. Select the dropdown arrow for **PO Category**, and click on the appropriate selection

The screenshot shows the same "Header" form, but with the **PO Category*** dropdown menu open. The menu lists the following options:

- E01 - Emergency
- P01 - Proprietary
- R01 - Routine
- S01 - Sole Source

 The dropdown menu and its contents are highlighted with a red box.

PO Category Refresher:

- E01 – Used for emergency procurements and requires approval from Procurement Services
- P01 – Do not use
- **R01** – Used for most all requisitions in eVA
- S01 – Used for situations in which a purchase is for a good that is truly a sole source and requires approval from Procurement Services
- VE1 – Do not use
- VP1 – Do not use
- VR1 – Do not use
- VS1 – Do not use
- **X02** – Used for situations in which a supplier is another government entity, such as a purchase from VCE, UVA, The State Department, etc. Also, when a purchase is an eVA exclusion but is being entered into eVA for transparency.

6. Select the dropdown arrow for **Procurement Transaction Type**, and click on the appropriate selection

The screenshot shows the 'Header' section of a requisition form. The 'Procurement Transaction Type' dropdown menu is open, displaying a list of options. The options are: Non-Procurement or Other, Non-professional Services - Non-Technology, Non-professional Services - Technology, PPEA/PPTA, Printing, Professional Services, Real Property, Supplies - Non-Technology, and Supplies - Technology. The dropdown menu is highlighted with a red border. Other fields in the form include Name (Non-Catalog Order), Organization (A216-Athletics), Type (Purchase), PO Category (R01 - Routine), Requester (Stubbs Dean), Reference Number, and PO for eVA Billing Reference. A 'Workflow Preview & Ad hoc' button is also visible.

7. After completing the required header fields, click **Save**
- If any of the required header fields have not been completed you will get an error message when attempting to save

The screenshot shows the 'Create Requisition' form. The 'Save' button is highlighted with a red border. Below the button, a message states: 'Fields marked by an asterisk * are mandatory'. The 'Header' section of the form is visible below the message, including a 'Comment' field.

8. After clicking Save, your page will refresh and you will see additional options on the Requisition
 - o Notice the Status will now be in (Draft)
 - o You can now add Items & Services (*Formerly Line Items*)

Requisition: REQ191578 - Jeremy Transition Guide Test (Draft)

Save | << Back to Catalog | Create Solicitation | Other Actions

Fields marked by an asterisk * are mandatory

Header

Name* Jeremy Transition Guide Test Organization* A216-JMU Purchasing

Type* Purchase PO Category* R01 - Routine

Requester* Good Jeremy Reference Number

Procurement Transaction Type* Supplies - Non-Technology

Header Field 1 Header Field 2

Status Draft

Workflow Preview & Ad hoc

Ship to* JMU - Procurement Services 752 Ott Street Harrisonburg

Bill To* JMU - Accounts Payable MSC 5712 1031 South Main Street Mass Hall Harrisonburg

Comment

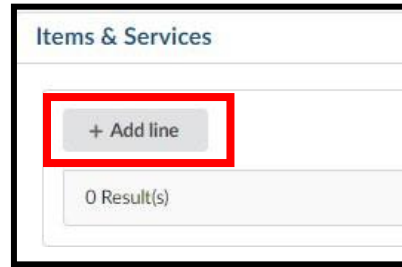
Create Blanket Purchase Order

Bypass Integration?

Items & Services

Note A: The Comment field to the right of the Header can be used to add comments to the requisition that will be **visible to suppliers and to eVA users**. At this time, you can no longer select/deselect the “visible to supplier” option to make comments internal or external. There is an internal only comments area further down on the requisition, **Internal Comments**.

9. Under Items & Services, click **+Add line**



10. The Item Details pop-up window will display

 A screenshot of a "Item Details" pop-up window. The window has a title bar with "Item Details" and window control icons. Below the title bar are three buttons: "Save", "Save & Close", and "Close". A light blue banner contains a note: "Fields marked by an asterisk * are mandatory" and "Expected date format: M/d/yyyy". The main content area is divided into two columns. The left column is titled "Item Description" and contains fields for "Product Type*" (with a dropdown menu showing "Product"), "Order Item Tag", "Item Type", "Short Description", "Detailed Description*", "Order Qty*" (with a dropdown menu showing "Ea."), "Commodity*", and "Delivery Date". The right column is titled "Estimate Costs" and contains a "Unit Price" field and a "Deliver To" section with a "Deliver To" field.

11. The **Product Type** will be defaulted to Product. If you need to change, select the dropdown arrow for **Product Type** and click on the appropriate selection

 A close-up screenshot of the "Item Description" section from the previous image. The "Product Type*" field is highlighted with a red box, and its dropdown menu is open, showing four options: "Freight", "Product", "Shipping", and "Services". The "Product" option is currently selected. The "Order Item Tag" field is visible to the right.

12. In the **Detailed Description** field, enter a description of the good/service purchased
 - Note that as you type, the field does not expand so you will not be able to see whole description/edit easily. This field only holds 192 characters.
13. The **Short Description** field is a fixed field currently that will duplicate what you have entered in the detailed description and is not editable.

The screenshot shows the 'Item Description' form. The 'Short Description' field contains the text: 'Furnish and Deliver Quote ABC123 - Item Number XYZ456, QTY 1. See Attached Quote. Call to arrange delivery with Doug Piker at x-XxXx'. The 'Detailed Description' field contains the same text. A red box highlights both the 'Short Description' and 'Detailed Description' fields.

14. In the **Order Qty** field, enter the numerical quantity of the item(s) you purchased

The screenshot shows the 'Detailed Description' field with the text: 'Furnish and Deliver Quote ABC123 - Item Number XYZ456, Qty 1. See Attached Quote. Call to arrange delievery with Doug Piker at 8-3151.' Below it, the 'Order Qty' field contains the number '1'. A red box highlights the 'Order Qty' field.

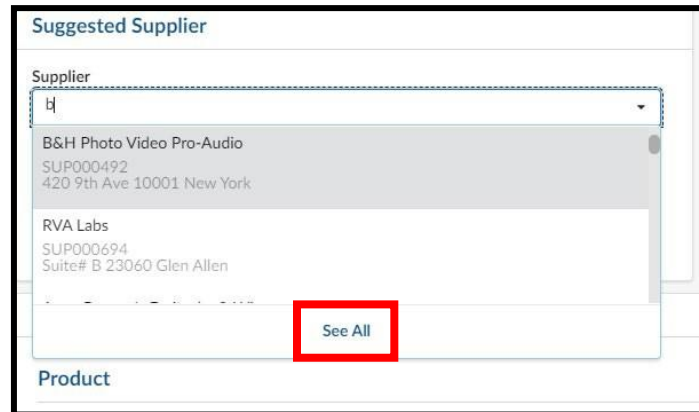
15. In the **Commodity** field, click in the field and begin typing the commodity name. The system will begin to populate available results that match. Once you find the best fitting commodity, click on the result in the listing to select it.

The screenshot shows the 'Order Qty' field with the number '1' and the 'Commodity' field with the text '20676 - Printers, 3D'. A red box highlights the 'Commodity' field.

16. In the **Unit Price** field, enter the exact cost of the line item (*disregard that it is titled Estimate Costs*)

The screenshot shows the 'Item Description' and 'Estimate Costs' sections. The 'Unit Price' field in the 'Estimate Costs' section contains the number '5529'. A red box highlights the 'Unit Price' field.

17. Under the Suggested Supplier area, click in the **Supplier** field and then click **See All**



18. From the **Browse Suppliers** window, enter the supplier's name into the **Keywords** field, then click **Search**. The results will be listed below. Note the following:

- This lists all supplier accounts, regardless of account status
- If a supplier's **Status** is listed as Discontinued, they cannot be used for a requisition
- The account type (self-registered vs state-entered) is not listed on this page. Use the public vendor list for this information. See the [Searching for Suppliers](#) section for additional details on this process.

Filters: Keywords: BSN Sports x Tier 1 Supplier Only: ✓ x Level: Supplier Group x Supplier Head-office x Supplier Site x

Code	Supplier	Web site	Status	Qualification	Document Status	Network	Risk Level	Pe
SUP125376	BSN Sports Inc		Discontinued					
SUP206711	BSN Sports Inc		Discontinued					
SUP228269	BSN Sports Inc		Discontinued					
SUP029938	BSN Sports LLC	HTTP://www.cpacsports.com	Active Supplier		✓			

19. Once you have located the correct listing for the needed supplier, click the **small checkbox** to the left of the supplier's name. The Item Details page will then load. The Supplier and Fulfillment Supplier fields will populate from the selection.

	Code	Supplier	Web site	Status
<input type="checkbox"/>	SUP125376	BSN Sports Inc		Discontinued
<input type="checkbox"/>	SUP206711	BSN Sports Inc		Discontinued
<input type="checkbox"/>	SUP228269	BSN Sports Inc		Discontinued
<input type="checkbox"/>	SUP029938	BSN Sports LLC	HTTP://www.cpacsports.com	Active Supplier

20. At the top of the Item Details window, click the **Save & Close** option

Item Details

Fields marked by an asterisk * are mandatory
 Expected date format: M/d/yyyy

21. Under **Items & Services** click on the appropriate checkbox
- A: This checkbox is used to select all line items. Use this when you want to set all line items to the same Department code and Account code.
 - B: This checkbox is used to select individual lines. Use this when you need to set the Department code and Account code on one or some of the line items.

Items & Services

0 Selected + Add line Copy Selected Lines Delete Lines Edit Lines Set Allocations

	#	Product Type	Order Item Reference	Item Description	Supplier
<input style="border: 2px solid red;" type="checkbox"/>					
<input style="border: 2px solid red;" type="checkbox"/>	6290-1	Product		Furnish and Deliver Quote ABC123	(B&H Photo Video Pr

1 Result(s)

22. Click **Set Allocations** (Formerly Accounting)

Items & Services

1 Selected + Add line Copy Selected Lines Delete Lines Edit Lines **Set Allocations**

✓	#	Product Type	Order Item Reference	Item Description	Supplier
✓	6290-1	Product		Furnish and Deliver Quote ABC123	(B&H Photo Video Pro-A

1 Result(s)

23. The Set Allocations window will display, click **+ Allocation**

Set Allocations

Apply & Close Close

Allocations

Chart of Account
James Madison University

+ Allocation Template List

%	Fiscal year*	Department*	Account*	Acc. Cross Reference	Organization ⓘ*

24. A new row will display allowing you to enter required allocation information.

Allocations

Chart of Account
James Madison University

+ Allocation Template List

%	Fiscal year*	Department*	Account*	Acc. Cross Reference	Organization ⓘ*
					A216-Athletics

25. In the % (Percentage) field enter the appropriate percentage

- If you are not using split line accounting, enter 100
- If you are using split line accounting, enter the appropriate percentage, and repeat step 21 to add more allocation rows. Remember the total allocation must equal 100 percent.

Allocations

Chart of Account
James Madison University

+ Allocation Template List

%	Fiscal year*	Department*	Account*	Acc. Cross Reference	Organization ⓘ*
100 %					A216-Athletics

26. You will now complete the other required allocation fields.
- Select the dropdown arrow for **Fiscal year** and click on the appropriate selection
 - Select the dropdown arrow for **Department** and click in the field and begin typing the department name or department number. The system will begin to populate available results that match. Once you find the correct department, click on the result in the listing to select it.
 - Select the dropdown arrow for **Account** and click in the field and begin typing the account code name or account code number. The system will begin to populate available results that match. Once you find the appropriate account code, click on the result in the listing to select it.

The screenshot shows the 'Allocations' window for James Madison University. It features a table with the following columns: %, Fiscal year*, Department*, Account*, Acc. Cross Reference, and Organization. The current allocation is 100% for the fiscal year 2021 - eVA-Wide, Department 100222 - Procurement, and Account 221700 - Other Computer Equipment. The Organization is A216 - Athletics. Red boxes highlight the dropdown arrows for the Fiscal year, Department, and Account fields.

27. At the top of the Set Allocations window, click the **Apply & Close** option

The screenshot shows the 'Set Allocations' window. At the top right, there are two buttons: 'Apply & Close' and 'Close'. The 'Apply & Close' button is highlighted with a red box. Below the buttons, there is a section labeled 'Allocations'.

28. You can now submit the requisition. At the top of the page, click **Submit for Approval**
- If the requisition is not within your expenditure authority, your approver will need to approve it.
 - In some situations, based on the items purchased or the dollar amount, the requisition may require approval from Procurement Services.
 - See the section on [PO Print Suppliers](#) for more information, if applicable

The screenshot shows the 'Requisition: REQ006290 - Non-Catalog Order (Draft)' window. At the top, there are four buttons: 'Save', 'Submit for Approval', '<< Back to Catalog', and 'Reset Allocations'. The 'Submit for Approval' button is highlighted with a red box. Below the buttons, there is a message: 'Fields marked by an asterisk * are mandatory'. Under the 'Header' section, there are two fields: 'Name*' with the value 'Non-Catalog Order' and 'Organization*' with the value 'A216-Athletics'.

Creating a Confirming Order

This section covers the process to complete an order to a confirming order with an eVA supplier

1. Click **Procurement** and then in the dropdown menu, click **Create Confirming Order**



2. Fill in the **Name** field (*this was previously the title field*)

Header

<p>Name*</p> <input type="text" value="Guide Confirming Order"/>	<p>Organization*</p> <input type="text" value="A216-JMU Purchasing"/>
<p>Type</p> <input type="text" value="Confirming Order"/>	<p>PO Category*</p> <input type="text" value="R01 - Routine"/>
<p>Requester*</p> <input type="text" value="Good Jeremy"/>	<p>Reference Number</p> <input type="text"/>
<p>Procurement Transaction Type*</p> <input type="text" value="Supplies - Non-Technology"/>	<p>Header Field 1</p> <input type="text"/>
<p>Status</p> <input type="text" value="Draft"/>	<p>Header Field 2</p> <input type="text"/>

[Workflow Preview & Ad hoc](#)

3. The **Organization** field will default to the appropriate selection based on your access in eVA

Header

<p>Name*</p> <input type="text" value="Confirming Order Example"/>	<p>Organization*</p> <input type="text" value="A216-VP Academic Affairs"/>
<p>Type*</p> <input type="text"/>	<p>PO Category*</p> <input type="text"/>

4. Select the dropdown arrow for **PO Category**, and click on the appropriate selection

Header

Name*
Confirming Order Example

Organization*
A216-VP Academic Affairs

Type*
Confirming Order

Requester*
Piker Doug

Procurement Transaction Type*
[Empty]

Status
Draft

Open Requisition

Bypass Integration?

PO Category*
[Dropdown Arrow]

- E01 - Emergency
- EE2 - Emergency - Special Declaration
- P01 - Proprietary
- R01 - Routine
- S01 - Sole Source
- VE1 - Technology - Emergency
- VP1 - Technology - Proprietary
- VR1 - Technology - Routine
- VS1 - Technology - Sole Source
- X02 - Exempt from Fees

PO Category Refresher:

- E01 – Used for emergency procurements and requires approval from Procurement Services
- P01 – Do not use
- **R01** – Used for most all requisitions in eVA
- S01 – Used for situations in which a purchase is for a good that is truly a sole source and requires approval from Procurement Services
- VE1 – Do not use
- VP1 – Do not use
- VR1 – Do not use
- VS1 – Do not use
- **X02** – Used for situations in which a supplier is another government entity, such as a purchase from VCE, UVA, The State Department, etc. Also, when a purchase is an eVA exclusion but is being entered into eVA for transparency.

5. Select the dropdown arrow for **Procurement Transaction Type**, and click on the appropriate selection

The screenshot shows a form titled "Header" with several fields. The "Procurement Transaction Type" field is highlighted with a red box, and its dropdown menu is open, showing a list of options. The options are: "Non-professional Services - Non-Technology", "Non-professional Services - Technology", "PPEA/PPTA", "Printing", "Professional Services", and "Real Property". A red box also highlights the dropdown arrow of this field. Other fields include "Name*" (Confirming Order Example), "Organization*" (A216-VP Academic Affairs), "Type*" (Confirming Order), "PO Category*" (R01 - Routine), "Requester*" (Piker Doug), "Reference Number", and "PO for eVA Billing Reference". A "Workflow Preview & Ad hoc" button is visible on the right.

6. After completing the required fields, click **Save**
 - o If any of the required fields have not been completed you will get an error message when attempting to save

The screenshot shows the "Create Requisition" page. The "Save" button is highlighted with a red box. Below the button, a message states: "Fields marked by an asterisk * are mandatory". The "Header" section of the form is visible below the message, including a "Comment" field with an information icon.

7. After clicking Save, your page will refresh and you will see additional options on the Requisition
 - Notice the Status will now be in (Draft)
 - You can now add Items & Services (*Formerly Line Items*)

Fields marked by an asterisk * are mandatory

Save | << Back to Catalog | Create Solicitation | Other Actions

Header

Name* Guide Confirming Order Organization* A216-JMU Purchasing

Type Confirming Order PO Category* R01 - Routine

Requester* Good Jeremy Reference Number

Procurement Transaction Type* Supplies - Non-Technology

Header Field 1 Header Field 2

Status Draft Workflow Preview & Ad hoc

Create Blanket Purchase Order

Bypass Integration?

Items & Services

+ Add line

Ship to

Ship to*

JMU - Procurement Services
752 Ott Street Harrisonburg

JMU - Procurement Services
752 Ott Street
Wine Price, 1st FL RM 1023, MSC 5720
Harrisonburg Virginia 22807
UNITED STATES
(540) 568-3145

Bill To

Bill To*

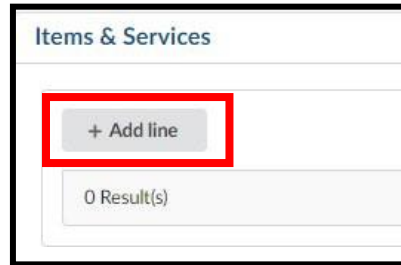
JMU - Accounts Payable MSC 5712
1031 South Main Street Mass Hall
Harrisonburg

JMU - Accounts Payable
MSC 5712 1031 South Main Street Mass Hall
Tax Exempt #: 208069909-8
Harrisonburg Virginia 22807
UNITED STATES
540-568-7397
acctspayable@jmu.edu

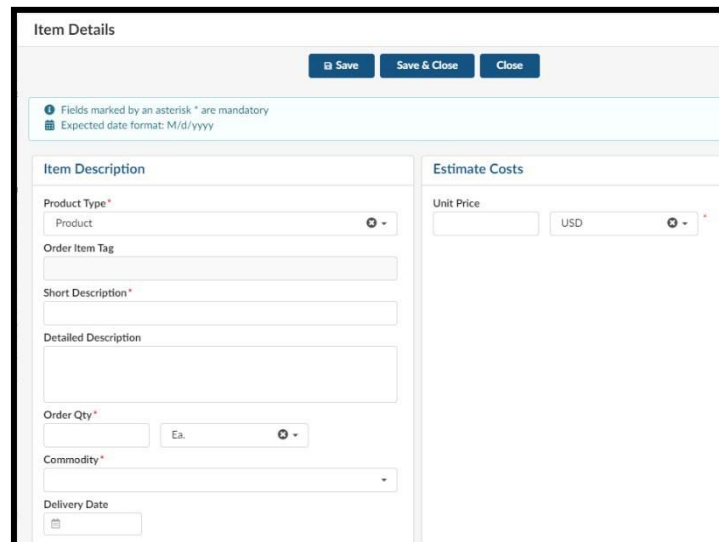
Comment

Note A: The Comment field to the right of the Header can be used to add comments to the requisition that will be **visible to suppliers and to eVA users**. At this time, you can no longer select/deselect the "visible to supplier" option to make comments internal or external. There is an internal only comments area further down on the requisition, **Internal Comments**.

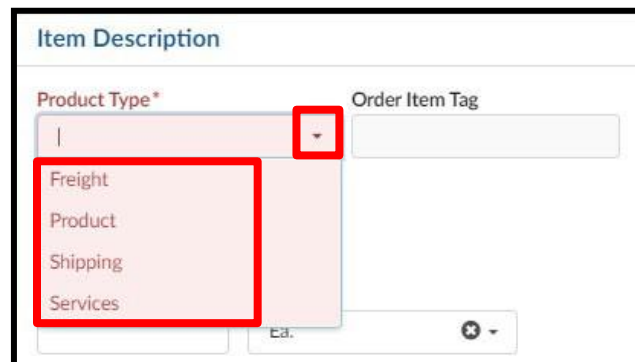
- Under Items & Services, click **+Add line**



- The Item Details pop-up window will display

A screenshot of the 'Item Details' pop-up window. At the top, there are three buttons: 'Save', 'Save & Close', and 'Close'. Below these buttons, there is a note: 'Fields marked by an asterisk * are mandatory' and 'Expected date format: M/d/yyyy'. The window is divided into two main sections: 'Item Description' on the left and 'Estimate Costs' on the right. The 'Item Description' section includes fields for 'Product Type*' (with a dropdown arrow), 'Order Item Tag', 'Short Description*', 'Detailed Description', 'Order Qty*' (with a unit dropdown set to 'Ea.'), 'Commodity*', and 'Delivery Date'. The 'Estimate Costs' section includes a 'Unit Price' field and a 'USD' dropdown arrow.

- Select the dropdown arrow for **Product Type** and click on the appropriate selection

A screenshot of the 'Item Description' section from the previous image. The 'Product Type*' dropdown menu is open, showing a list of options: 'Freight', 'Product', 'Shipping', and 'Services'. The dropdown menu is highlighted with a red rectangular box. The 'Product Type*' field is also highlighted with a red rectangular box. The 'Order Item Tag' field is visible to the right of the dropdown menu.

11. In the **Short Description** field, enter a short description of the good/service purchased
 - Note that as you type, the field does not expand so you will not be able to see whole description/edit easily. This field only holds 192 characters. For longer descriptions, see step 13.
 - Please note that the Short Description field is mandatory, you must enter something.
12. The **Detailed Description** field is a paragraph entry text box that can hold multiple lines of text

The screenshot shows the 'Item Description' form. The 'Product Type' dropdown is set to 'Services'. The 'Short Description' field is empty and highlighted with a red box. The 'Detailed Description' field contains the text 'Confirming order for website order placed on 12/34/56' and is also highlighted with a red box. The 'Order Qty' field is set to '1Q' and the unit is 'Ea.'.

13. In the **Order Qty** field, enter the numerical quantity of the number of items you purchased. **The quantity in the screenshot is just an example.**

The screenshot shows the 'Item Description' form. The 'Product Type' dropdown is set to 'Services'. The 'Short Description' field is empty. The 'Detailed Description' field contains the text 'Confirming order for website order placed on 12/34/56'. The 'Order Qty' field is set to '1Q' and is highlighted with a red box. The unit is 'Ea.'.

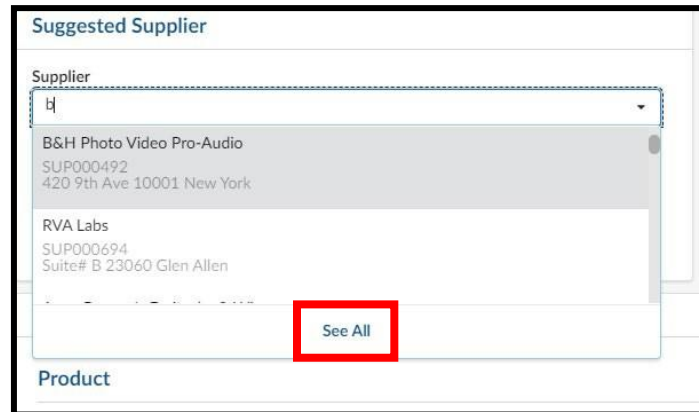
14. In the **Commodity** field, click in the field and begin typing the commodity name. The system will begin to populate available results that match. Once you find the best fitting commodity, click on the result in the listing to select it.

The screenshot shows the 'Item Description' form. The 'Commodity' field is highlighted with a red box and contains the text '20676 - Printers, 3D'. Other fields include 'Product Type' (Services), 'Order Qty' (10), and 'Detailed Description' (Confirming order for website order placed on 12/34/56).

15. In the **Unit Price** field, enter the exact cost of the line item (*disregard that it is titled "Estimate Costs"*)

The screenshot shows the 'Item Description' form on the left and the 'Estimate Costs' form on the right. The 'Unit Price' field in the 'Estimate Costs' form is highlighted with a red box and contains the value '150Q'. The 'Commodity' field in the 'Item Description' form is also visible and contains '20676 - Printers, 3D'.

16. Under the Suggested Supplier area, click in the **Supplier** field and then click **See All**



17. From the **Browse Suppliers** window, enter the supplier's name into the **Keywords** field, then click **Search**. The results will be listed below. Note the following:

- This lists all supplier accounts, regardless of account status
- If a supplier's **Status** is listed as Discontinued, they cannot be used for a requisition
- The account type (self-registered vs state-entered) is not listed on this page. Use the public vendor list for this information. See the [Searching for Suppliers](#) section for additional details on this process.

Filters: Keywords: BSN Sports x Tier 1 Supplier Only: ✓ x Level: Supplier Group x Supplier Head-office x Supplier Site x

Code	Supplier	Web site	Status	Qualification	Document Status	Network	Risk Level	Pe
SUP125376	BSN Sports Inc		Discontinued					
SUP206711	BSN Sports Inc		Discontinued					
SUP228269	BSN Sports Inc		Discontinued					
SUP029938	BSN Sports LLC	HTTP://www.cpacsports.com	Active Supplier		✓			

18. Once you have located the correct listing for the needed supplier, click the **small checkbox** to the left of the supplier's name. The Item Details page will then load. The Supplier and Fulfillment Supplier fields will populate from the selection.

	Code	Supplier	Web site	Status
<input type="checkbox"/>	SUP125376	BSN Sports Inc		Discontinued
<input type="checkbox"/>	SUP206711	BSN Sports Inc		Discontinued
<input type="checkbox"/>	SUP228269	BSN Sports Inc		Discontinued
<input type="checkbox"/>	SUP029938	BSN Sports LLC	HTTP://www.cpacsports.com	Active Supplier

19. At the top of the Item Details window, click the **Save & Close** option

Item Details

Fields marked by an asterisk * are mandatory
 Expected date format: M/d/yyyy

20. Under **Items & Services** click on the appropriate checkbox
- A: This checkbox is used to select all line items. Use this when you want to set all line items to the same Department code and Account code.
 - B: This checkbox is used to select individual lines. Use this when you need to set the Department code and Account code on one or some of the line items.

Items & Services

0 Selected + Add line Copy Selected Lines Delete Lines Edit Lines Set Allocations

	#	Product Type	Order Item Reference	Item Description	Supplier
<input style="border: 2px solid red;" type="checkbox"/>	6701-1	Product		Confirming order for order already placed	(B&H Photo Video Pro-Audio)

1 Result(s)

21. Click **Set Allocations** (*Formerly Accounting*)

Items & Services

1 Selected + Add line Copy Selected Lines Delete Lines Edit Lines **Set Allocations**

#	Product Type	Order Item Reference	Item Description	Supplier
6701-1	Product		Confirming order for order already placed	(B&H Photo Video Pro-Audio)

1 Result(s)

22. The Set Allocations window will display, click **+ Allocation**

Set Allocations

Apply & Close Close

Allocations

Chart of Account
James Madison University

+ Allocation Template List

%	Fiscal year*	Department*	Account*	Acc. Cross Reference	Organization ⓘ*
---	--------------	-------------	----------	----------------------	-----------------

23. A new row will display allowing you to enter required allocation information.

Allocations

Chart of Account
James Madison University

+ Allocation Template List

%	Fiscal year*	Department*	Account*	Acc. Cross Reference	Organization ⓘ*
					A216-Athletics ⓘ

24. In the % (Percentage) field enter the appropriate percentage
- If you are not using split line accounting, enter 100
 - If you are using split line accounting, enter the appropriate percentage, and repeat step 21 to add more allocation rows. Remember the total allocation must equal 100 percent.

Allocations

Chart of Account
James Madison University

+ Allocation Template List

%	Fiscal year*	Department*	Account*	Acc. Cross Reference	Organization ⓘ*
100 %					A216-Athletics ⓘ

25. You will now complete the other required allocation fields.
- Select the dropdown arrow for **Fiscal year** and click on the appropriate selection
 - Select the dropdown arrow for **Department** and click in the field and begin typing the department name or department number. The system will begin to populate available results that match. Once you find the correct department, click on the result in the listing to select it.
 - Select the dropdown arrow for **Account** and click in the field and begin typing the account code name or account code number. The system will begin to populate available results that match. Once you find the appropriate account code, click on the result in the listing to select it.

The screenshot shows the 'Allocations' window for James Madison University. It features a table with the following columns: %, Fiscal year*, Department*, Account*, Acc. Cross Reference, and Organization. The table contains one row with the following values: 100 %, 2021 - eVA-Wide, 100222 - Procurement, 221700 - Other Computer Equipment, and A216-Athletics. Red boxes highlight the dropdown arrows for the Fiscal year, Department, and Account fields.

26. At the top of the Set Allocations window, click the **Apply & Close** option

The screenshot shows the 'Set Allocations' window. At the top right, there are two buttons: 'Apply & Close' and 'Close'. The 'Apply & Close' button is highlighted with a red box.

27. You can now submit the requisition. At the top of the page, click **Submit for Approval**
- If the requisition is not within your expenditure authority, your approver will need to approve it.
 - In some situations, bases on the items purchased or the dollar amount, the requisition may require approval from Procurement Services.
 - See the section on [PO Print Suppliers](#) for more information, if applicable

The screenshot shows the 'Requisition: REQ006701 - Confirming Order Example (Draft)' page. At the top, there are several buttons: 'Save', 'Submit for Approval', '<< Back to Catalog', 'Reset Allocations', and 'Other Actions'. The 'Submit for Approval' button is highlighted with a red box. Below the buttons, there is a 'Header' section with fields for Name, Organization, Type, PO Category, Requester, and Reference Number. A 'Ship to' section is also visible on the right side.

Creating an Order to an Un-Registered Supplier (formerly Ad-Hoc Order)

This section covers the process to complete an order to an unregistered supplier (formerly ad-hoc vendor). Prior to using this method, you will want to ensure the supplier is not already in eVA. This can be done by reviewing the [Searching for Suppliers](#) section for details on this process. Orders for restricted items and those over 10k MUST process through Procurement BEFORE commencing work or placing any order with a supplier. This confirming order process is the only way to ad hoc a supplier, but all normal purchasing approval requirements must still apply. Departments are strongly requested to utilize self-registered suppliers or have your supplier "State Entered" by Procurement, in advance. If a supplier needs to be "state entered", send completed COVA w-9 to askeva@jmu.edu and Procurement will process that request with the state. The list of restricted purchases is found on the procurement website at <https://www.jmu.edu/procurement/departmental-guide/04.shtml#Set-1-A-restricted>

1. Click **Procurement** and then in the dropdown menu, click **Create Confirming Order**



2. Fill in the **Name** field (*this was previously the title field*)

Header

<p>Name*</p> <input style="width: 90%;" type="text" value="Ad-Hoc Vendor Example"/>	<p>Organization*</p> <input style="width: 90%;" type="text" value="A216-Athletics"/>
<p>Type*</p> <input style="width: 90%;" type="text" value="Purchase"/>	<p>PO Category*</p> <input style="width: 90%;" type="text"/>
<p>Requester*</p> <input style="width: 90%;" type="text" value="Stubbs Dean"/>	<p>Reference Number</p> <input style="width: 90%;" type="text"/>

3. The Organization field will default to the appropriate selection based on your access in eVA

Header

<p>Name*</p> <input style="width: 90%;" type="text" value="Ad-Hoc Vendor Example"/>	<p>Organization*</p> <input style="width: 90%;" type="text" value="A216-Athletics"/>
<p>Type*</p> <input style="width: 90%;" type="text"/>	<p>PO Category*</p> <input style="width: 90%;" type="text"/>

4. Select the dropdown arrow for **PO Category**, and click on the appropriate selection

The screenshot shows a 'Header' form with the following fields:

- Name***: Ad-Hoc Vendor Example
- Organization***: A216-Athletics
- Type***: Confirming Order
- Requester***: Stubbs Dean
- Procurement Transaction Type***: (empty)
- Status**: Draft
- Open Requisition

The **PO Category*** dropdown menu is open, showing the following options:

- E01 - Emergency
- EE2 - Emergency - Special Declaration
- P01 - Proprietary
- R01 - Routine
- S01 - Sole Source
- VE1 - Technology - Emergency
- VP1 - Technology - Proprietary
- VR1 - Technology - Routine
- VS1 - Technology - Sole Source
- X02 - Exempt from Fees

PO Category Refresher:

- E01 – Used for emergency procurements and requires approval from Procurement Services
- P01 – Do not use
- **R01** – Used for most all requisitions in eVA
- S01 – Used for situations in which a purchase is for a good that is truly a sole source and requires approval from Procurement Services
- VE1 – Do not use
- VP1 – Do not use
- VR1 – Do not use
- VS1 – Do not use
- **X02** – Used for situations in which a supplier is another government entity, such as a purchase from VCE, UVA, The State Department, etc. Also, when a purchase is an eVA exclusion but is being entered into eVA for transparency.

5. Select the dropdown arrow for **Procurement Transaction Type**, and click on the appropriate selection

Header

Name* Ad-Hoc Vendor Example Organization* A216-Athletics

Type* Confirming Order PO Category* R01 - Routine

Requester* Stubbs Dean Reference Number

Procurement Transaction Type*

- Highway Construction
- Non-Procurement or Other
- Non-professional Services - Non-Technology
- Non-professional Services - Technology
- PPEA/PPTA
- Printing

6. After completing the required header fields, click **Save**
 - o If any of the required header fields have not been completed you will get an error message when attempting to save

Create Requisition

Save

Fields marked by an asterisk * are mandatory

Header

Comment

7. After clicking Save, your page will refresh and you will see additional options on the Requisition
 - o Notice the Status will now be in (Draft)
 - o You can now add Items & Services (*Formerly Line Items*)

Requisition: REQ001888 - Ad-Hoc Vendor Example (In progress)

Save | << Back to Catalog | Reset Allocations | Other Actions

Fields marked by an asterisk * are mandatory

Header

Name* Ad-Hoc Vendor Example Organization* A216-Athletics

Type* Confirming Order PO Category* R01 - Routine

Requester* Stubbs Dean Reference Number

Procurement Transaction Type* Supplies - Non-Technology PO for eVA Billing Reference

Status In progress Workflow Preview & Ad hoc

Open Requisition

Bypass Integration?

Items & Services

0 Selected + Add line

Ship to

Ship to* JMU - Procurement Services 752 Ott St Harrisonburg

JMU - Procurement Services
752 Ott St
MSC 5720, Wine Price 1023
Harrisonburg Virginia 22807
UNITED STATES

A

Note A: The Comment field to the right of the Header can be used to add comments to the requisition that will be **visible to suppliers and to eVA users**. At this time, you can no longer select/deselect the "visible to supplier" option to make comments internal or external. There is an internal only comments area further down on the requisition, **Internal Comments**.

8. Under Items & Services, click **+Add line**

Items & Services

+ Add line

0 Result(s)

9. The Item Details pop-up window will display

Item Details

Save Save & Close Close

Fields marked by an asterisk * are mandatory
Expected date format: M/d/yyyy

Item Description

Product Type*
Product

Order Item Tag

Short Description*

Detailed Description

Order Qty*
Ea.

Commodity*

Delivery Date

Estimate Costs

Unit Price
USD

10. Select the dropdown arrow for **Product Type** and click on the appropriate selection

Item Description

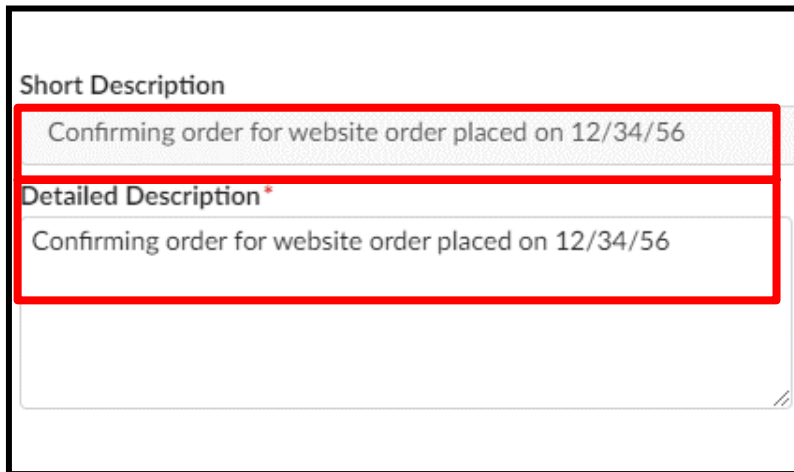
Product Type*
|

Order Item Tag

Freight
Product
Shipping
Services

Ea.

11. In the **Short Description** field, you currently can not enter a description. This will copy the information entered into the Detailed Description.
12. The **Detailed Description** field is a paragraph entry text box that can hold multiple lines of text
 - o Please note that the Detailed Description field is mandatory, you must enter something.



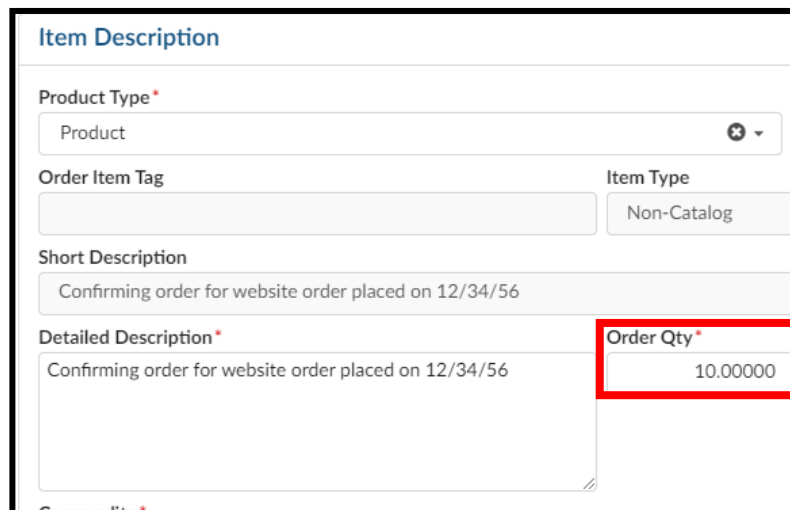
Short Description

Confirming order for website order placed on 12/34/56

Detailed Description *

Confirming order for website order placed on 12/34/56

13. In the **Order Qty** field, enter the numerical quantity of the item(s) you purchased. **The quantity used in the screenshot below is just an example, you should enter the quantity that is correct for your purchase.**



Item Description

Product Type *

Product

Order Item Tag

Item Type

Non-Catalog

Short Description

Confirming order for website order placed on 12/34/56

Detailed Description *

Confirming order for website order placed on 12/34/56

Order Qty *

10.00000

14. In the **Commodity** field, click in the field and begin typing the commodity name. The system will begin to populate available results that match. Once you find the best fitting commodity, click on the result in the listing to select it.

Item Description

Product Type*

Order Item Tag

Short Description

Detailed Description*

Commodity*

15. In the **Unit Price** field, enter the exact cost of the line item (*disregard that it is titled "Estimate Costs"*)

Item Description

Product Type*

Order Item Tag

Short Description

Detailed Description*

Item Type

Order Qty*

Estimate Costs

Unit Price

Deliver To

Deliver To

16. Under the Suggested Supplier, click the checkbox **Unable to Register Supplier**
- Only check this after verifying that a supplier is not in eVA and you need to ad-hoc the supplier. See the [Searching for Suppliers](#) section for additional details on this process.
 - Users should work to source from registered suppliers or send company information and COVA w-9 to Procurement for "state" entry ahead of a purchase. Purchasing from "Unregistered" suppliers should be limited.

Suggested Supplier

Supplier

Fulfillment Supplier ⓘ

Unable to Register Supplier ⓘ

17. In the **Unregistered Supplier Name** field, enter the supplier's name
- Please continue to submit any W-9's to Procurement via askeva@jmu.edu

Suggested Supplier

Unable to Register Supplier ⓘ

Unregistered Supplier Name*

Ad-hoc Vendor Example Name

18. At the top of the Item Details window, click the **Save & Close** option

Item Details

Save Save & Close Close

Fields marked by an asterisk * are mandatory
Expected date format: M/d/yyyy

19. Under **Items & Services** click on the appropriate checkbox
- A: This checkbox is used to select all line items. Use this when you want to set all line items to the same Department code and Account code.
 - B: This checkbox is used to select individual lines. Use this when you need to set the Department code and Account code on one or some of the line items.

Items & Services

0 Selected + Add line Copy Selected Lines Delete Lines Edit Lines Set Allocations

	#	Product Type	Order Item Reference	Item Description	Supplier
<input type="checkbox"/>	1888-1	Product		Ad-Hoc Vendor Example Description	(Unregistered Supplier) Unregistered S

1 Result(s)

A

B

20. Click **Set Allocations** (Formerly Accounting)

The screenshot shows a table with one row. The columns are: #, Product Type, Order Item Reference, Item Description, and Supplier. The row contains: 1888-1, Product, Ad-Hoc Vendor Example Description, and (Unregistered Supplier) Unregistered Supplier. The 'Set Allocations' button is highlighted with a red box.

#	Product Type	Order Item Reference	Item Description	Supplier
1888-1	Product		Ad-Hoc Vendor Example Description	(Unregistered Supplier) Unregistered Supplier

21. The Set Allocations window will display, click **+ Allocation**

The screenshot shows the 'Set Allocations' window. The 'Chart of Account' is set to 'James Madison University'. The '+ Allocation' button is highlighted with a red box. Below the button is a table with columns: %, Fiscal year*, Department*, Account*, Acc. Cross Reference, and Organization ⓘ*.

%	Fiscal year*	Department*	Account*	Acc. Cross Reference	Organization ⓘ*

22. A new row will display allowing you to enter required allocation information.

The screenshot shows the 'Set Allocations' window with a new row added to the table. The 'Organization' field is set to 'A216-Athletics'.

%	Fiscal year*	Department*	Account*	Acc. Cross Reference	Organization ⓘ*
					A216-Athletics ⓘ

23. In the % (Percentage) field enter the appropriate percentage

- If you are not using split line accounting, enter 100
- If you are using split line accounting, enter the appropriate percentage, and repeat step 21 to add more allocation rows. Remember the total allocation must equal 100 percent.

The screenshot shows the 'Set Allocations' window with the percentage field set to 100. The field is highlighted with a red box.

%	Fiscal year*	Department*	Account*	Acc. Cross Reference	Organization ⓘ*
100 %					A216-Athletics ⓘ

24. You will now complete the other required allocation fields.
- Select the dropdown arrow for **Fiscal year** and click on the appropriate selection
 - Select the dropdown arrow for **Department** and click in the field and begin typing the department name or department number. The system will begin to populate available results that match. Once you find the correct department, click on the result in the listing to select it.
 - Select the dropdown arrow for **Account** and click in the field and begin typing the account code name or account code number. The system will begin to populate available results that match. Once you find the appropriate account code, click on the result in the listing to select it.

The screenshot shows the 'Allocations' window for James Madison University. It features a 'Chart of Account' dropdown set to 'James Madison University'. Below this is a '+ Allocation' button and a 'Template List' dropdown. A table displays allocation details with the following columns: %, Fiscal year*, Department*, Account*, Acc. Cross Reference, and Organization. The table contains one row with the following values: 100 %, 2021 - eVA-Wide, 100222 - Procurement, 221700 - Other Computer Equipment, and A216-Athletics. Red boxes highlight the dropdown arrows for the Fiscal year, Department, and Account fields.

25. At the top of the Set Allocations window, click the **Apply & Close** option

The screenshot shows the 'Set Allocations' window. At the top right, there are two buttons: 'Apply & Close' and 'Close'. The 'Apply & Close' button is highlighted with a red box. Below the buttons is a section labeled 'Allocations'.

26. You can now submit the requisition. At the top of the page, click **Submit for Approval**
- If the requisition is not within your expenditure authority, your approver will need to approve it.
 - In some situations, bases on the items purchased or the dollar amount, the requisition may require approval from Procurement Services.
 - See the section on [PO Print Suppliers](#) for more information, if applicable

The screenshot shows the 'Requisition: REQ001888 - Ad-Hoc Vendor Example (Draft)' page. At the top, there are several buttons: 'Save', 'Submit for Approval', '<< Back to Catalog', 'Reset Allocations', and 'Other Actions'. The 'Submit for Approval' button is highlighted with a red box. Below the buttons is a 'Header' section with fields for Name, Organization, Type, and PO Category. The 'Ship to' section is also visible, showing 'JMU - Procurement Services 752 C'.

Creating a PCO (PCard Order)

This section covers the process of using a PCard (SPCC) on an order and is supplemental to the previous sections. This can be done in each of the different kinds of orders.

The screenshot shows the 'Header' section of a Purchase Requisition form. The 'Save' button is located in the top right corner and is highlighted with a red rectangular box. The form fields include:

- Name*: PCard Order
- Organization*: A216-JMU Purchasing
- Type*: Purchase
- PO Category*: R01 - Routine
- Requester*: Good Jeremy
- Reference Number: (empty)
- Procurement Transaction Type*: Supplies - Non-Technology

1. Enter in your Header Information in the same way we have for each of the previous examples and click save to enter line item information.

The screenshot shows the 'Purchase Requisition' screen. The left sidebar has a 'Pcard' option highlighted with a red box. The main form area shows the 'Header' section with the following fields:

- Name*: PCard Order
- Organization*: A216-JMU Purchasing
- Type*: Purchase
- PO Category*: R01 - Routine
- Requester*: Good Jeremy
- Reference Number: (empty)
- Procurement Transaction Type*: Supplies - Non-Technology
- Header Field 1: (empty)
- Header Field 2: (empty)
- Status: Draft

Buttons at the top include 'Save', '<< Back to Catalog', and 'Create Solicitation'. A 'Workflow Preview & Ad hoc' button is at the bottom right.

2. On the left side of the requisition screen, click Pcard to add your Pcard to this order. Note, you must have a Pcard already associated with your account to complete this step.

The screenshot shows the 'Purchase Requisition' screen with the 'Pcard' option selected in the left sidebar. A dropdown menu is open, showing the following options:

- Select Applicable Pcard
- Jeremy Good
- See All

The 'Save' button is visible in the top right corner.

3. From the dropdown, select your Pcard for use. Save once you have selected your Pcard.

Item Details 🖨️ 🗂️ ✕

Save **Save & Close** **Close** | **Reset Allocations**

Item Description

Product Type*
Product ⊗

Order Item Tag _____ Item Type
Non-Catalog

Short Description
Pcard order for testing

Detailed Description*
Pcard order for testing

Order Qty*
1.00000 Ea. ⊗

Commodity*
00500 - ABRASIVES ⊗

Delivery Date
📅

Estimate Costs

Unit Price
50.00000 USD

Deliver To

Deliver To
Jeremy Good

4. Fill in your Item Details screen with the appropriate information for your order.

Suggested Supplier

Supplier
1 OrderAnything ⊗

Fulfillment Supplier ⓘ
1 OrderAnything 🔗

Supplier Contact
📄

Allocations

Chart of Account
James Madison University ⊗

+ Allocation Template List

%	Fiscal year*	Department*	Account*	Acc. Cross Reference	Organization ⓘ
100 %	2021 - eVA-Wide ⊗	100222 - Procurement ⊗	221700 - Other Computer Equipment ⊗		A216 - Athletics ⊗

5. Fill in Supplier Information and add an Allocation.

Requisition: REQ192381 - PCard Order (Draft)

Save | Submit for Approval | << Back to Catalog | Reset Allocations

Fields marked by an asterisk * are mandatory

Header

Name*	PCard Order	Organization*	A216-JMU Purchasing
Type*	Purchase	PO Category*	R01 - Routine
Requester*	Good Jeremy	Reference Number	

6. You can now click "Submit for Approval" on the order.

Approvals

By default, when any approval is required in New eVA, an email notification is sent to the individual(s) that need to take action. Those emails are sent by **Virginia noreply@cgieva.com**. There is a hyperlink within the email that can be used to directly access the requisition needing approval (after appropriately signing into eVA). However, there is a **My to-do list** feature under your profile name that contains all requisitions needing approval.

1. Once you have accessed and opened the requisition needing approval, Click **Approve** or **Reject**
 - If you click Reject, you are required to enter a reason why. Be sure the note/comment is appropriate and reflects the reason for denial as this comment is public record.

Requisition: REQ006988 - New Buyer Inbox with Ad-Hoc for SPCC U

Buttons: Save, Close, Save & Close, **Reject**, **Approve**

Fields marked by an asterisk * are mandatory

Header

Name*	Organization
New Buyer Inbox with Ad-Hoc for SPCC Use Test	A216-JMU
Type*	PO Category
Purchase	R01 - Rout

2. The requisition will route to the next stage of approval if there are additional approvals required. The requestor will be notified each time the requisition is approved.

Adding an Ad Hoc Approver

This section covers the process to ad hoc an approver onto a requisition. If you are completing this process to utilize another eVA user's SPCC, review the [How to associate others with you SPCC](#) section for details on this process.

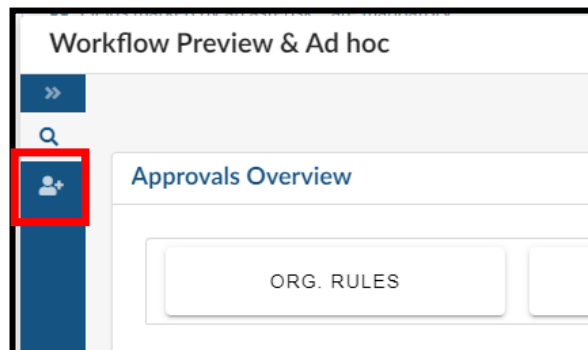
1. From the Requisition Header, click **Workflow Preview & Ad hoc**.
 - The Requisition Header must be completed and **Save** button clicked before starting this process. If not, the ad hoc approver will not save as expected.

The screenshot shows the 'Header' section of a requisition form. It contains several fields:

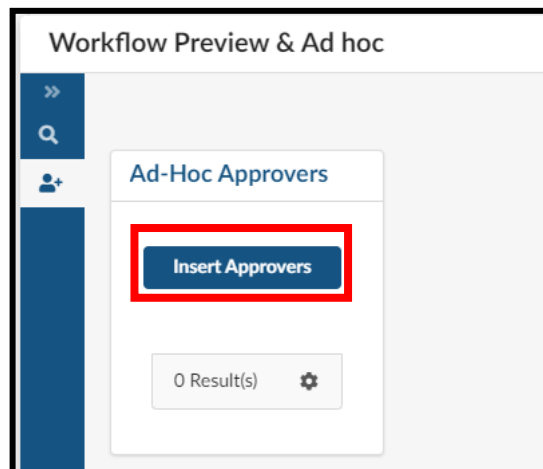
- Name***: Ad Hoc Approver Example
- Organization***: A216-VP Academic Affairs
- Type***: Purchase
- PO Category***: R01 - Routine
- Requester***: Stubbs Dean
- Reference Number**: (empty)
- Procurement Transaction Type***: Printing
- PO for eVA Billing Reference ⓘ**: (empty)
- Status**: Draft

 A blue button labeled 'Workflow Preview & Ad hoc' is located at the bottom right of the form and is highlighted with a red rectangular box.

2. From the **Workflow Preview & Ad hoc** window, click the **Ad-Hoc Approver** icon



3. Click **Insert Approvers**



4. From the **Ad hoc Approver** window, enter the name or JMU email address of the card holder in the **Adhoc Approvers** field. The system will begin to populate available results that match. Once you find the correct individual, click on the result in the listing to select them.

The screenshot shows the 'Adhoc Approvers' form. The 'Adhoc Approvers*' field is highlighted with a red box. Below it, the 'When*' section has radio buttons for 'Before' and 'After', and a 'Pre-Defined Rule(s)*' dropdown menu. The 'Reason' field is empty. The 'Status*' dropdown menu is set to 'Valid'.

5. In the **Reason** field, enter why you have added this individual as an ad hoc approver.
 - Please note this reason will only display in the Workflow Preview & Ad hoc window, and not in the email notification sent to requisition ad hoc approver

The screenshot shows the 'Adhoc Approvers' form. The 'Adhoc Approvers*' field now contains 'Fahrney Mikayla'. The 'When*' section has the 'After' radio button selected. The 'Reason' field is highlighted with a red box and contains the text 'Need approval for budget approva'. The 'Status*' dropdown menu is still set to 'Valid'.

6. Click **Save & Close**

The screenshot shows the 'Adhoc Approver' form. At the top right, there are two buttons: 'Save' and 'Save & Close'. The 'Save & Close' button is highlighted with a red rectangular box. Below the buttons, the form contains a section titled 'Adhoc Approvers' with a search bar containing 'Fahrney Mikayla'. There are radio buttons for 'When' (Before and After), a dropdown for 'Pre-Defined Rule(s)', and a text area for 'Reason' containing 'Need approval for budget approval'. At the bottom, there is a 'Status' dropdown set to 'Valid'.

7. From the **Workflow Preview & Ad hoc** window, click **Save & Close**

- If you need to add additional ad hoc approvers, go back to step three and repeat this process as needed.

The screenshot shows the 'Workflow Preview & Ad hoc' window. At the top right, there are three buttons: 'Save', 'Save & Close', and 'Close'. The 'Save & Close' button is highlighted with a red rectangular box. Below the buttons, there is a section titled 'Ad-Hoc Approvers' with an 'Insert Approvers' button. Below that is a table with the following data:

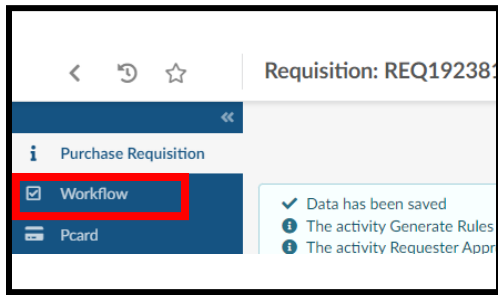
Order	Adhoc Approvers	Rules Description	Reason
1	Dickens Caroline	eva_adhoc	Adding Caroline for needed budget approval

Below the table, it says '1 Result(s)' and there is a gear icon for settings.

8. Once the requisition has been submitted, the selected ad hoc approver will be added into the approval flow and will be notified to approve when it is their turn.

Checking your Orders Approval Flow

This section will cover the steps to view your orders approval flow and which approvers need to take action still.



1. From your Requisition, click "Workflow" on the left side of the screen.



2. Click "Upcoming Approvals & Ad hoc".

Approval Profile	Approver	Type	Rule Label	Rule Order
Adhoc Approvers	Phillip Ewell	Adhoc Approver	Adhoc Approvers	800001

1 Result(s)

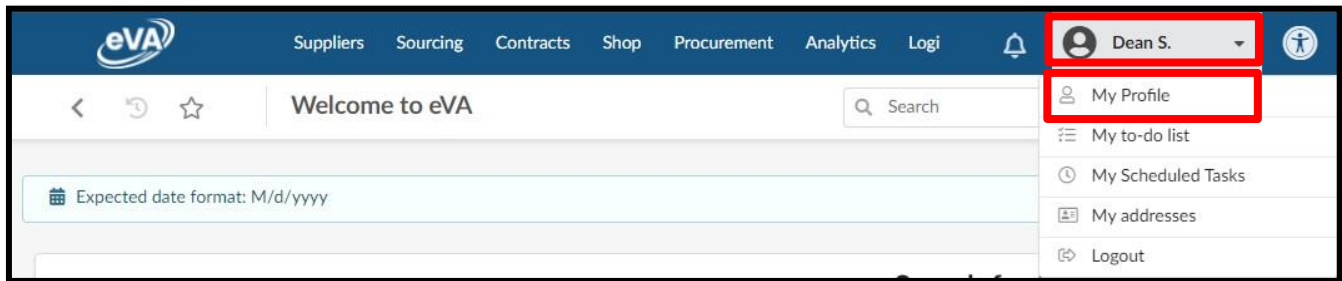
3. Under the workflow preview you can view upcoming approvals depending on the rules assigned by eVA when your order is submitted.

Managing your SPCC in eVA

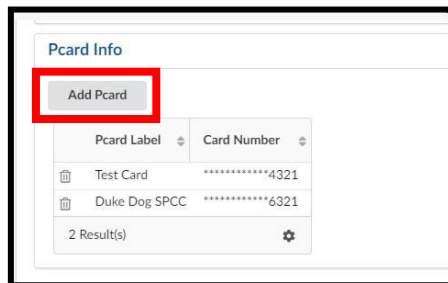
This section covers the process of loading your SPCC, deleting your SPCC, updating your SPCC, and the workaround for associating your SPCC with other users. This section will also cover how to use your SPCC on requisitions. Please note that you can only load an SPCC assigned to you in your eVA account. Adding another card holder's SPCC into your eVA account is a violation of policy.

How to load your SPCC to eVA

1. Click the **YOUR NAME Icon** and in the dropdown menu, click **My Profile**



2. From the Profile Management page, scroll down the Pcard Info section, click **Add Pcard**



3. The PCard Manage pop-up window will display. Enter all the details as appropriate.
 - Pcard Label – This is how the SPCC will be displayed (*Formerly PCard Alias*)
 - Card Provider – Click in the field and select **Visa**
 - Name – Enter how your name appears on your SPCC
 - Card Number – Enter the card number as it appears on your SPCC (without any spaces)
 - Expiration Month – Enter the card’s expiration month
 - Expiration Year - Enter the card’s expiration year

The screenshot shows the 'PCard Manage' form. At the top right are 'Save & Close' and 'Close' buttons. Below them is a message: 'Fields marked by an asterisk * are mandatory'. The form contains several fields: 'User Login' (STUBBS Dean), 'Pcard Label' (1234 Training SPCC), 'Card Provider*' (Visa), 'Name (as it appears on your card)' (Duke J Dog), 'Card Number*' (1234123412341234), 'Expiration Month*' (June), and 'Expiration Year*' (2023). A red rectangular box highlights the 'Pcard Label', 'Card Provider*', 'Name (as it appears on your card)', 'Card Number*', 'Expiration Month*', and 'Expiration Year*' fields.

4. At the top of the Pcard Manage pop-up window, click **Save & Close**

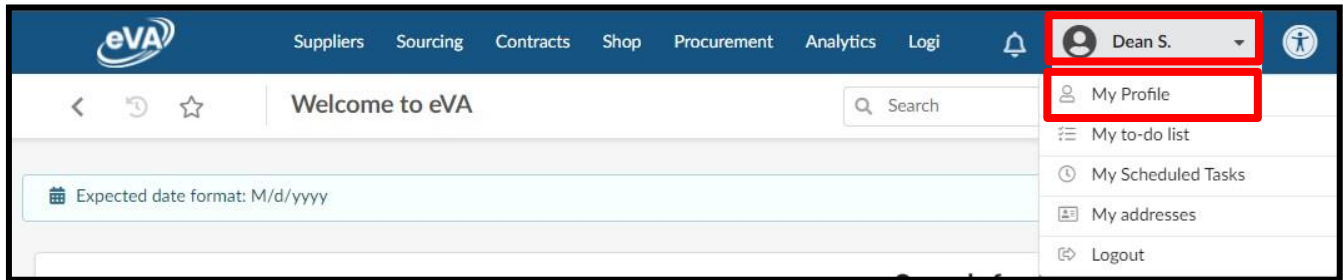
This screenshot shows the top portion of the 'PCard Manage' form. The 'Save & Close' button is highlighted with a red rectangular box. Below the buttons is the same message: 'Fields marked by an asterisk * are mandatory'.

5. Your SPCC will now be available for use on requisitions immediately. You may need to refresh the Profile Management page to see the card you just added.

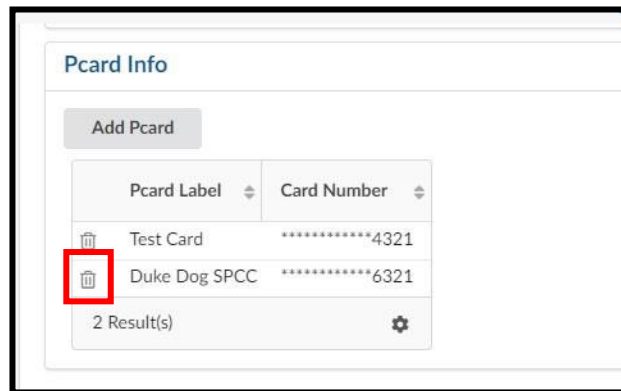
How to update and remove your SPCC

After you have added your SPCC into eVA there is no longer a way to edit the information, such as the expiration date. You will need to delete the existing card and re-add it.

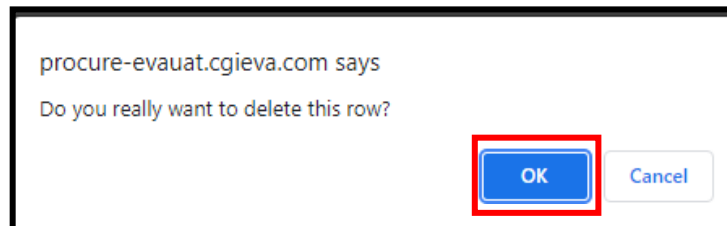
1. Click the **YOUR NAME Icon** and in the dropdown menu, click **My Profile**



2. From the Profile Management page, scroll down the Pcard Info section, click the **Trashcan icon** next to the Pcard label of the card you want to remove.



3. A confirmation pop-up window will display. Select **OK** to delete the card. The card will be deleted immediately.



4. If you needed to update the card you just deleted, you can now re-add the card. [See How to load your SPCC to eVA](#) for the process.

How to associate others with your SPCC (ad hoc approver process)

At this time, there is not an option to associate another user with your SPCC. As a result, we have a new process to use another eVA user's SPCC at the time of requisition. You will need to ad hoc the card holder onto the requisition as an approver. When the requisition routes to them for approval, they will need to add their SPCC onto the requisition.

1. From the Requisition Header, click **Workflow Preview & Ad hoc**.
 - o The Requisition Header must be completed and **Save** button clicked before starting this process. If not, the ad hoc approver will not save as expected.

The screenshot shows the 'Header' section of a requisition form. It includes fields for Name (SPCC Ad hoc Example), Organization (A216-Vice President), Type (Purchase), PO Category (R01 - Routine), Requester (Stubbs Dean), Reference Number, Procurement Transaction Type (Supplies - Technology), PO for eVA Billing Reference, and Status (Draft). A blue button labeled 'Workflow Preview & Ad hoc' is highlighted with a red rectangular box in the bottom right corner.

2. From the **Workflow Preview & Ad hoc** window, click the **Ad-Hoc Approver** icon

The screenshot shows the 'Workflow Preview & Ad hoc' window. It features a search icon and a sidebar with a red box around the 'Ad-Hoc Approver' icon (a person with a plus sign). The main content area displays 'Approvals Overview' and 'ORG. RULES'.

3. Click **Insert Approvers**

The screenshot shows the 'Workflow Preview & Ad hoc' window with the 'Ad-Hoc Approvers' section active. A blue button labeled 'Insert Approvers' is highlighted with a red rectangular box. Below it, there is a display showing '0 Result(s)' and a settings gear icon.

4. From the **Ad hoc Approver** window, enter the name or JMU email address of the card holder in the **Adhoc Approvers** field. The system will begin to populate available results that match. Once you find the correct individual, click on the result in the listing to select them.

The screenshot shows the 'Adhoc Approver' window. At the top right, there are buttons for 'Save' and 'Save & Close'. Below these is a section titled 'Adhoc Approvers' with a sub-header 'Adhoc Approvers will be inserted at the end of the workflow.' The main input field is labeled 'Adhoc Approvers *' and contains the text 'caroline dickens'. Below the input field, a dropdown menu is open, showing the search results 'Dickens Caroline'. A red box highlights the input field and the dropdown menu. Below the dropdown is a 'See All' link. At the bottom of the window, there is a 'Status *' field with the value 'Valid' and a dropdown arrow.

5. In the **Reason** field, enter why you have added this individual as an ad hoc approver.
- Please note this reason will only display in the Workflow Preview & Ad hoc window, and not in the email notification sent to requisition ad hoc approver
 - You should reach out to the card holder outside of eVA and let them know they need to add their SPCC when the requisition routes to them for approval

The screenshot shows the 'Adhoc Approver' window. At the top right, there are buttons for 'Save', 'Save & Close', and 'Close'. Below these is a section titled 'Adhoc Approvers' with a sub-header 'Adhoc Approvers will be inserted at the end of the workflow.' The main input field is labeled 'Adhoc Approvers *' and contains the text 'Dickens Caroline' with a dropdown arrow. Below this is a 'Reason' field, which is highlighted with a red box and contains the text 'Adding so Caroline can attach their SPCC to this REQ'. At the bottom of the window, there is a 'Status *' field with the value 'Valid' and a dropdown arrow.

- Click **Save & Close**

The screenshot shows a form titled "Adhoc Approver". At the top right, there are three buttons: "Save", "Save & Close", and "Close". The "Save & Close" button is highlighted with a red rectangular box. Below the buttons, the form contains a section titled "Adhoc Approvers" with a sub-header "Adhoc Approvers will be inserted at the end of the workflow." Underneath, there is a field labeled "Adhoc Approvers *" containing a tag for "Dickens Caroline" with a close button (x) and a plus sign. Below that is a "Reason" field with the text "Adding so Caroline can attach their SPCC to this REQ".

- From the **Workflow Preview & Ad hoc** window, click **Save & Close**

The screenshot shows a window titled "Workflow Preview & Ad hoc". At the top right, there are three buttons: "Save", "Save & Close", and "Close". The "Save & Close" button is highlighted with a red rectangular box. The main content area is titled "Ad-Hoc Approvers" and contains an "Insert Approvers" button. Below this is a table with the following data:

Order	Adhoc Approvers	Rules Description	Reason
1	Dickens Caroline	eva_adhoc	Adding so Caroline can attach their SPCC to this REQ

Below the table, it says "1 Result(s)" and there is a gear icon for settings.

- Once the requisition has been submitted, the selected ad hoc approver will be added into the approval flow and will be notified to approve when it is their turn.
 - If that user has an active SPCC on their eVA profile, they will be able to add it to the requisition. See [How to add or remove a SPCC onto a requisition](#) for more information on this process.

How to add or remove a SPCC onto a requisition

One notable change is that using a Pcard on a requisition takes extra steps. It is no longer defaulted to be used, and it is not located on the header.

1. On the left-hand side of the requisition screen, click the Pcard icon

The screenshot shows the eVA interface for requisition REQ002155. The left sidebar contains several icons, with the Pcard icon (a card with a checkmark) highlighted by a red box. The main content area shows the 'Header' section with the following fields:

- Name***: Example- SPCC Requisition - On Behalf Of SPCC
- Type***: Purchase
- Requester***: Stubbs Dean

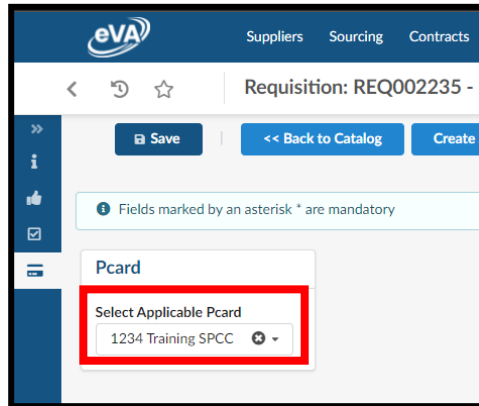
2. From the Pcard tab, select the dropdown arrow for **Select Applicable Pcard**. Select the appropriate SPCC for the requisition, then click **Save**.

The screenshot shows the eVA interface for requisition REQ002235. The 'Save' button in the top left is highlighted with a red box. The 'Pcard' section is active, and the 'Select Applicable Pcard' dropdown menu is open, showing a list of options. The dropdown arrow is also highlighted with a red box. The list of options includes:

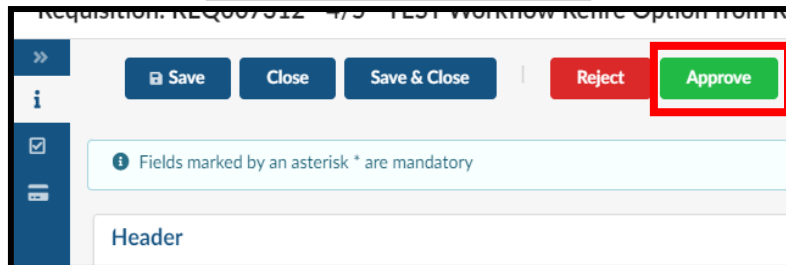
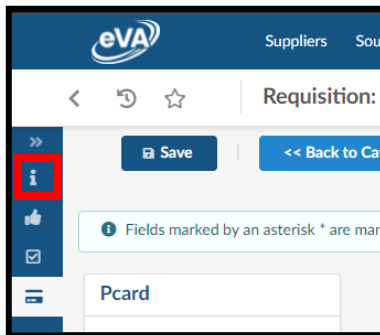
- 1234 Training SPCC
- Duke Dog SPCC
- New Test CArd
- Test Card

A 'See All' link is visible at the bottom of the dropdown menu.

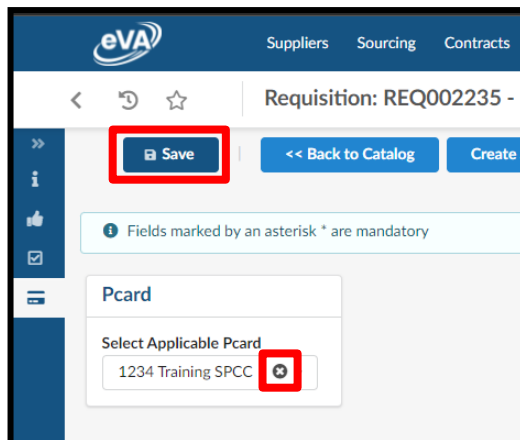
3. Once the selected SPCC is listed under **Select Applicable Pcard**, after the requisition is fully approved, it will generate a PCO. If the supplier accepts electronic orders and Pcards, the selected SPCC will be visible to the supplier in their eVA account.



- If you are adding your SPCC onto a requisition as part of an ad hoc approver process, click the **i** icon and then click **Approve** to move the REQ forward in the approval flow



4. If you need to remove the SPCC from a requisition, click the X icon next to the selected Pcard Label, and then, click **Save**



How to Order on Behalf of Another User

This section will detail giving "On Behalf of" access to another user and selecting that user when placing an order. When this access is given, if you place an order on behalf of another user, it will follow their approval flow. Please note that Org Rules and Signature Authority procedures still need to be followed.

1. When you create a new requisition, you will have access to change the requestor to the alternate user and choose who the requestor is.

The screenshot shows a requisition header form with the following fields:

Header	
Name Jeremy	Organization A216-JMU Purchasing
Type Purchase	PO Category R01 - Routine
Requester Fahrney Mikayla	Reference Number
Procurement Transaction Type Supplies - Non-Technology	

2. When you choose the person in the requestor field that you need to order on behalf of, you will proceed with entering in line information, allocations and other required fields as you normally would. Once you have selected the requestor, you can navigate to the Pcard section and select which Pcard you would like to use.

The screenshot shows the Pcard selection interface:

Pcard

Select Applicable Pcard

MFahrney (highlighted in red) [x] ▼

Jeremy Good

See All

3. Now, once you have selected the person you are ordering on behalf of and selected their Pcard if applicable, you can submit the order for approval. When you do this, it will require an approval from the person that you are ordering on behalf of. It will be best to communicate to the person that you are ordering on behalf of ahead of time that you are submitting the order. To view the awaiting approvals, you will click the workflow preview button from the purchase requisition screen. Here you will see who needs to approve before this moves to an ordered status.

Requisition: REQ192597 - Jeremy (In progress)

Purchase Requisition

Workflow

Pcard

Data has been saved
Validated successfully

Header

Name
Jeremy

Type
Purchase

Approvals

Approval History

Activity	Name	Delegate to	Created on (UTC-4)	Validated on (UTC-4)	State	Due date (UTC-4)	Initial performer
Requester Approval	Mikayla FAHRNEY		11/1/2022 9:47:55 AM		●●○		Mikayla FAHRNEY
Draft	Jeremy GOOD		11/1/2022 9:47:55 AM	11/1/2022 9:47:55 AM	●●●		Jeremy GOOD

2 Result(s)

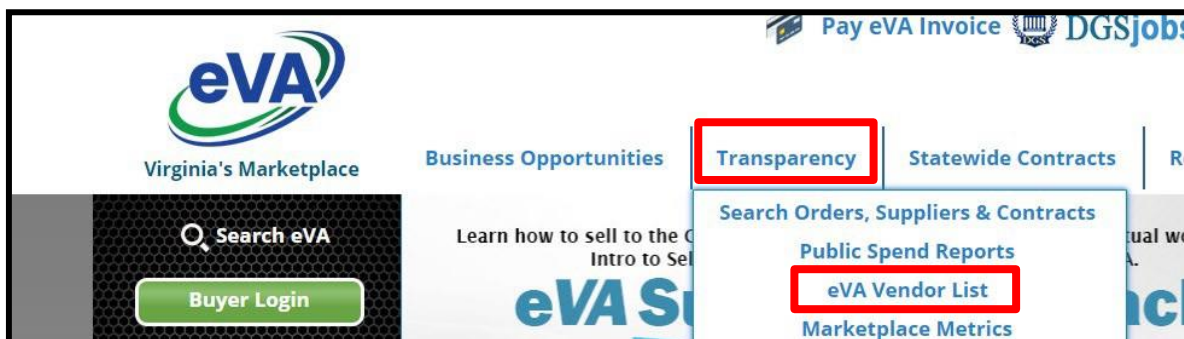
Searching for Suppliers, Orders, & Requisitions

Suppliers outside of a requisition

When searching for suppliers there are two options. First, is to use the eVA public vendor list which will not change as a result of New eVA. Second is to search from within the New eVA Supplier area.

To search the public eVA Vendor list

- Go to the eVA homepage eva.virginia.gov
- From the top center, click **Transparency**, then **eVA Vendor List**



- From the **eVA Vendor List**, enter the supplier's name (full or partial) and click **Search**

Search for Vendor Name, Vendor Customer Code or VLIN
 dell marketing lp
 with search logic.

Vendor names starting with: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Others

SWAM Type
 All SWAM Values
 O - Micro Business
 S - Small Business
 M - Minority Owned Business
 W - Women Owned Business
 SDV - Service Disabled Veteran Owned
 ESO - Employment Service Organization
 Return vendors with all selected criteria.

Registration Type
 ALL
 Self-Registered
 State-Entered

Search Reset Search

Maximum of 1,000 vendors are displayed. To navigate buttons or enter page# and click your TAB key.

Status	HQ	VendorID (Click for Details)	eMail Supplier Name (Vendor Loc. Std Name)	eMail Contact (Location Name)	Address 1	City	St	Zip
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7. Once the search result return, and you have identified the correct supplier record there are several items of use on this listing
- o Status – will indicate if the supplier is self-registered (Self) or state-entered (State)
 - o VendorID - can be used to search for a supplier (instead of supplier name) in the **Items Details** window while creating a requisition

Status	HQ	VendorID (Click for Details)	eMail Supplier Name (Vendor Loc. Std Name)	eMail Contact (Location Name)	Address 1
Active Self	Y	C24123	CORDELL MEDICAL REMARKETING	Richmond - CORDELL MEDICAL REMARKETING	8426 SANFORD RD
Active Self	Y	C24916	DELL MARKETING LP	DELL MARKETING LP-Dell	One Dell Way
Active Self	N	YS0000259478	Dell Marketing LP	Dell EMC	P.O. Box 643561

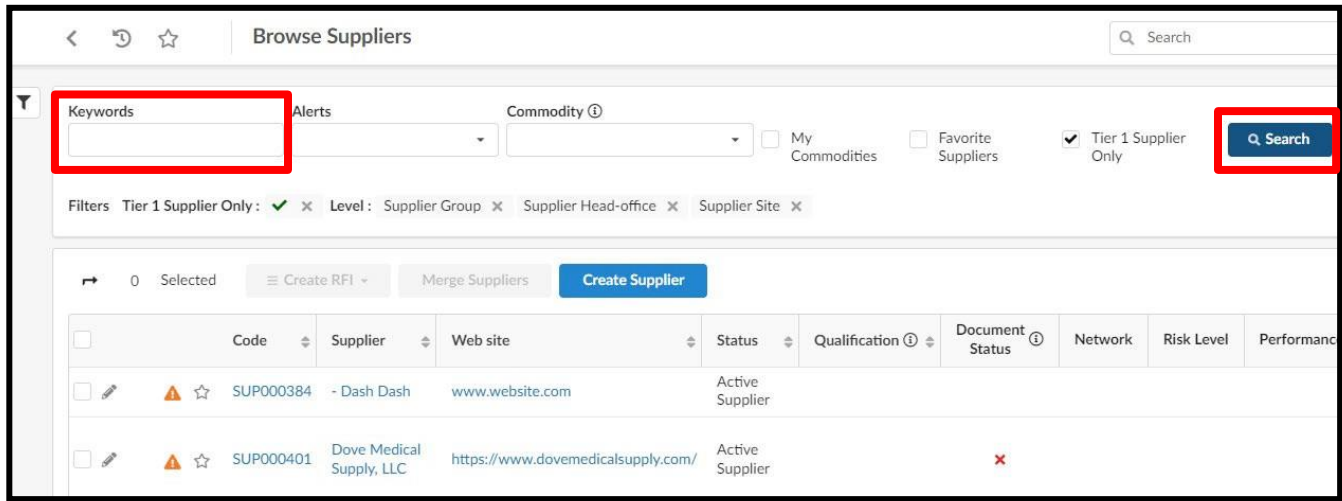
Report9001.2.1

To search the within New eVA (outside of creating a requisition)

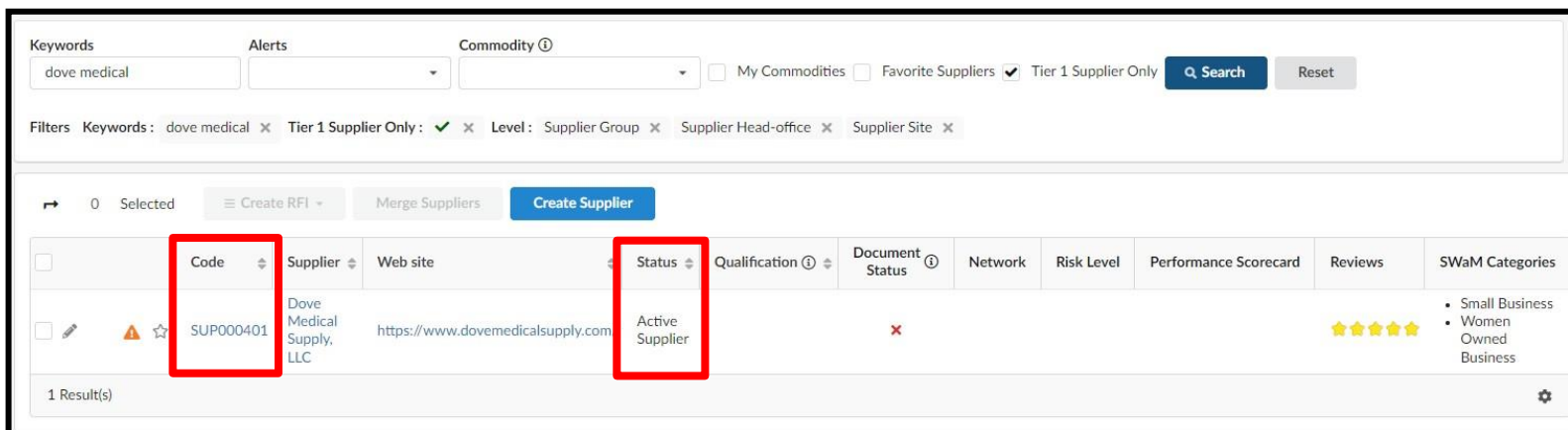
1. Click **Suppliers** and then in the dropdown menu, click **Browse Suppliers**



2. From Browse Suppliers page, you can enter some or all of a supplier's name into the **Keywords** field, then click **Search**



3. Once the search results are returned there are several items to make note of
 - **Code** – this is the supplier's eVA ID number that can be used to search with when creating a line item, instead of the supplier's name.
 - **Status** – this indicates the supplier's eVA status. Previously a deactivated supplier would not show up in eMall/eForms, but in New eVA all suppliers will show up when creating a line item regardless of their status. If a supplier has the status of Discontinued or Non-Payment, you will not be able to submit a requisition to that supplier account record. If a supplier has the status of Active or Bad Address you will be able to submit a requisition. Note that this does not indicate their registration type (self-registered vs state-entered). See the above process on how to use the public vendor list to discern this information.



Requisitions

1. Click **Procurement** and then in the dropdown menu, click **Browse Requisitions**



2. From the **Browse Requisitions** page, you can enter several options into the Keywords field. For example, you can enter the REQ# or the partial requisition name (formerly requisition title), then click **Search**.

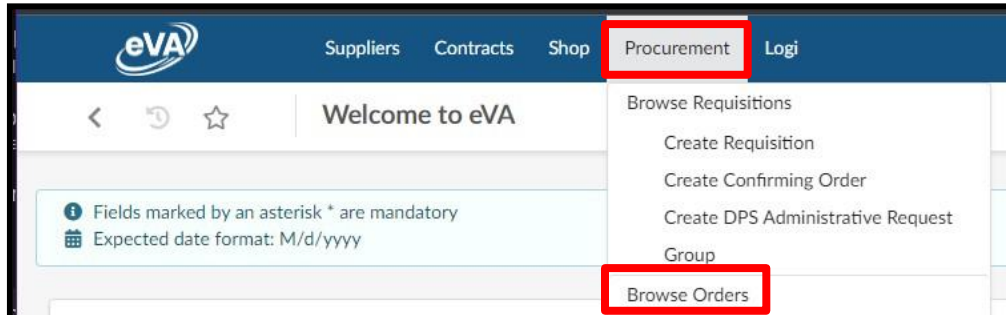
 A screenshot of the 'Browse Requisitions' search interface. At the top, there are navigation icons (back, refresh, star) and the title 'Browse Requisitions'. Below this is a date selection field with a calendar icon and the text 'Expected date format: M/d/yyyy'. The main search area contains three input fields: 'Keywords', 'Reference Number', and a checkbox labeled 'My Requests'. The 'Keywords' field is highlighted with a red box. To the right of the 'My Requests' checkbox is a blue 'Search' button with a magnifying glass icon, also highlighted with a red box. A grey 'Reset' button is located to the right of the 'Search' button.

- If you need to search a PR# (created in old eVA that converted), enter the PR# into the **Reference Number** field
- To search only your requisitions, select the checkbox beside **My Requests**

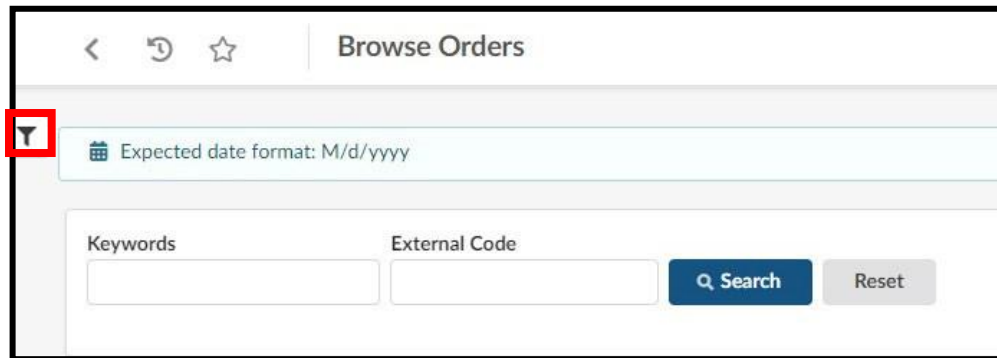
Orders

This process covers how to search orders that were created in New eVA and orders created in previous eVA that converted into New eVA. To search for orders that did not convert, or any order for that matter, you can search in the Data Warehouse. See our [How-To video](#) for more information on that process.

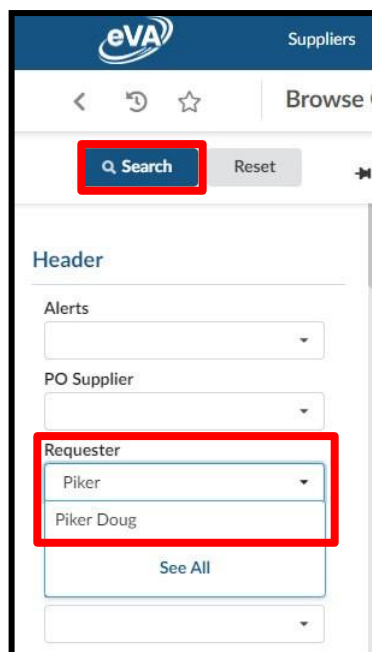
1. Click **Procurement** and then in the dropdown menu, click **Browse Orders**



2. From the **Browse Orders** page, click the **Filter** icon



3. From the **Filter** window, enter the name or JMU email address of the requester in the **Requester** field. The system will begin to populate available results that match. Once you find the correct individual, click on the result in the listing to select them. Then click **Search**.



4. From the search results listing, you can further refine the search by sorting the various headings

- Select the appropriate order by clicking the blue hyperlink under the **Purchase Order #** column

Keywords		External Code		<input type="text"/> <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Reset"/>	
Filters Requester: Piker Doug <input type="button" value="x"/>					
Purchase Order #	Version #	PO Supplier	SWam Categories	Purchase Requisition	
PO00001079	1	- Dash Dash		Follow-Up Test - Changes with REQ in process - Change at user ad-hoc	
PO00002179	1	- Dash Dash		New Test - Change Req After ETF Approver	

Adding Attachments to a Requisition

Adding attachments to a requisition should only be done at the header level attachments area. See [Line item attachments not saving as expected](#) for more information on why.

- From the requisition header, scroll down to the **Attachments** section and click the **> arrow** to expand the Attachment section.

< ↻ ☆
Requisition: REQ007018 - Adding Attachments to a Requisition Example (Draft)

0 Selected

#	Product Type	Order Item Reference	Item Description	Supplier
<input type="checkbox"/> 7018-1	Product		Example Line Item	(Dove Medical Supply, LLC) Dove

1 Result(s)

> Allocations

> Approvals

- Once the Attachment section has expanded, click **+ New Document**

- From the **Content editor** window, click either **Internal Attachment** or **Supplier Document**
 - It is important to make the correct document type selection, because to change the document type later requires deleting and then reattaching the file. There is no check box to switch the visibility type.
 - Internal Attachment – will only be visible to JMU eVA Users
 - Supplier Document – will be visible to suppliers (if they are self-registered in eVA and sign into eVA to review the attachment)

- From the **Internal Attachment** or **Supplier Document** window, enter a general description for the attachment(s) that will be added in the **Documentation** field

5. To add files, either Click the **Click or Drag to add files** button or drag and drop files over this button to attach.
 - o Multiple files can be at once using either method. However, the file size for each individual file must be less than 300 MB. The attachment process can also be repeated to add additional files, if needed later.

The screenshot shows a document form with several sections: Title, Information, and Summary. The 'Information' section contains a 'Status' dropdown menu set to 'Approved' and a 'Document' dropdown menu set to 'English'. Below the 'Document' dropdown is a button labeled 'Click or Drag to add files', which is highlighted with a red rectangular box. At the top of the form, there are buttons for 'Save', 'Save & Close', 'Close', 'Save & Preview', and 'Delete'. A notification bar at the top states 'Fields marked by an asterisk * are mandatory'.

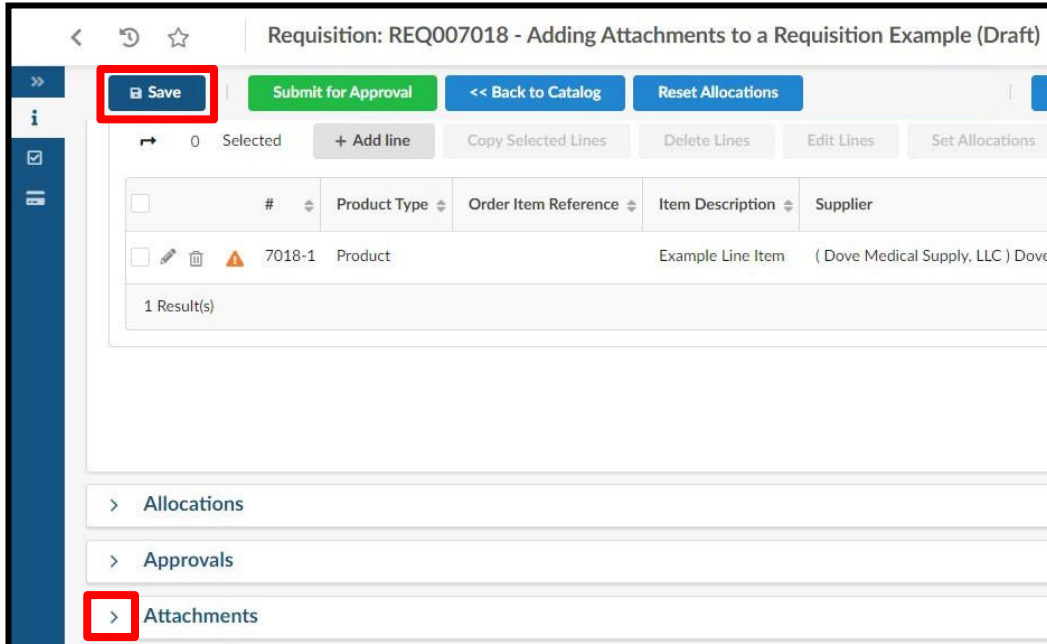
6. If you need to delete an attachment, click the **X** icon

This is a close-up view of the 'Document' section of the form. It shows the 'Document' dropdown menu set to 'English' and the 'Click or Drag to add files' button. Below this, there is a list of attachments. The first attachment is 'EN - BH Quote 1081174704.pdf' with a red 'X' icon next to it, which is highlighted by a red rectangular box. The second attachment is 'EN - Example Attachment.docx' with a grey 'X' icon next to it.

7. After the needed files have been added, click **Save & Close**

This screenshot shows the full document form again, but now with two attachments listed: 'EN - BH Quote 1081174704.pdf' and 'EN - Example Attachment.docx'. The 'Save & Close' button at the top of the form is highlighted with a red rectangular box. The rest of the form, including the 'Status' and 'Document' dropdowns, remains the same as in the previous screenshots.

8. From the requisition header, click **Save**. Then scroll down to the **Attachments** section and click the **>** arrow to expand the Attachment section, and verify the attachments were added



9. The attachments added will display in the listing. If multiple attachments were uploaded at once, those will be indicated in the **Att.** column with multiple icons. The **# Result(s)** at the bottom of the attachments table is based off the number of times step two and three are completed, and not the total number of attachments on the requisition.



Adding a Contract Number to a Line Item

When needing to add a contract number onto a line item you will use the **External Contract Number** field.

- From within the line item, scroll down to the **Internal Additional Details** section and look for the **External Contract Number** field. You will just need to type or copy and paste the needed contract number into the field – if applicable.
 - Continue editing the line item normally, and then be sure to click **Save & Close** when finished

The screenshot shows the 'Item Details' form. At the top, there are three buttons: 'Save', 'Save & Close', and 'Close'. The 'Save & Close' button is highlighted with a red box. Below the buttons, there is a 'Supplier Contact' section with a dropdown menu showing 'SPECIALIST eProcurement'. To the right, there is a field for 'United States'. Below this is the 'Internal Additional Details' section, which is expanded. Underneath, there is a 'Product' section with a dropdown menu. Below that, there is a 'Contract' section with a text input field. This 'External Contract Number' field is highlighted with a red box and contains the placeholder text 'Place contract number here - if applicable'. To the right of this field, there is a 'Supplier Item' field and a 'Resale Flag' checkbox.

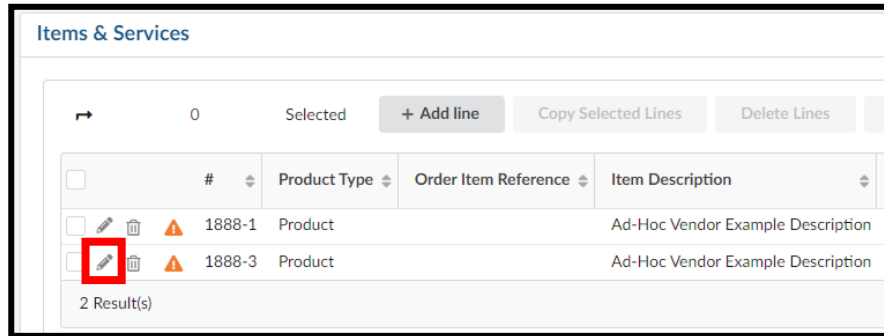
Breaking Out Shipping Charges

Because the University and Suppliers are not charged eVA fees on Shipping Fees, we must breakout the shipping charges for orders and apply the appropriate commodity code. Below walks through this process.

- From a Requisition you have already started, under the **Items & Services** select the checkbox next to line item one and then select **Copy Selected Lines**.
 - This ensures any supplier information is transferred over to the new line item

The screenshot shows the 'Items & Services' table. At the top, there is a header row with a right arrow, the number '1', the word 'Selected', a '+ Add line' button, and a 'Copy Selected Lines' button. The 'Copy Selected Lines' button is highlighted with a red box. Below the header, there is a table with columns: '#', 'Product Type', 'Order Item Reference', and 'Item Description'. The first row of the table has a checked checkbox in the first column, the number '1888-1' in the second column, 'Product' in the third column, and 'Ad-Hoc Vendor B' in the fourth column. Below the table, there is a '1 Result(s)' label.

- Click the **pencil icon** to edit the copied line item



- The Item Details pop-window will display. Update the Item Details accordingly.
 - Product Type – Select the dropdown arrow and select **Shipping**
 - Short Description – Type **Shipping Fee**
 - Detailed Description – is optional and can be used for any additional information needed about the shipping fee
 - Order Qty – Set to **1**
 - Commodity – Enter **96286** which is *Transportation of Goods and Other Freight Services*
 - Unit Price – Update according to the shipping fee amount
 - Once all details are updated accordingly, click **Save & Close**

The screenshot shows the 'Item Details' pop-window. At the top, there are buttons for 'Save', 'Save & Close', 'Close', and 'Reset Allocations'. The window is split into two main sections: 'Item Description' on the left and 'Estimate Costs' on the right. In the 'Item Description' section, several fields are highlighted with red boxes: 'Product Type' (dropdown set to 'Shipping'), 'Short Description' (text field with 'Shipping Fee'), 'Detailed Description' (text area with '(extra informaion about the shipping fee - if needed)'), 'Order Qty' (input field with '1.00' and unit dropdown 'Ea.'), and 'Commodity' (dropdown set to '96286 - Transportation of Goods and Other Freight Services'). In the 'Estimate Costs' section, the 'Unit Price' field is highlighted with a red box, showing a value of '15.00' and a currency dropdown set to 'USD'.

- Set any necessary Allocations (*Department and Account codes*)