



New eVA Transition Guide

Version 4.0
Updated July 25, 2024

JMU Procurement Services

Need eVA Help?
Contact Us!

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**Procurement
Services**



Table of Contents

Table of Contents

New eVA Overview	4
Changes as a Result of the New Platform.....	4
<i>SPCC converted from previous eVA.....</i>	<i>4</i>
<i>SPCC no longer defaulted to "Use Pcard"</i>	<i>4</i>
<i>SPCC no longer can be edited.....</i>	<i>4</i>
<i>"Copy" now called "Duplicate".....</i>	<i>4</i>
<i>Prefixes on purchase orders and requisitions.....</i>	<i>5</i>
<i>Options to change or cancel a purchase order moved</i>	<i>5</i>
<i>Options to withdraw a purchase order.....</i>	<i>5</i>
<i>Change order numbering.....</i>	<i>6</i>
Converted Orders	6
Requisition	6
Purchase Order (PO or PCO).....	6
<i>Requisition comments – supplier section vs internal section.....</i>	<i>7</i>
<i>Requisition attachments – supplier visible upload vs internal only upload.....</i>	<i>7</i>
<i>PO print suppliers – reminder approval removed</i>	<i>7</i>
<i>Blocking error messages</i>	<i>7</i>
Challenges & Known Issues of the New Platform.....	7
<i>Vendors may not get your orders electronically.....</i>	<i>7</i>
<i>Non-catalog requisitions and purchase orders display a warning icon.....</i>	<i>7</i>
Signing into eVA.....	9
Creating a Punchout Catalog Order	11
Creating a Non-Catalog Order.....	21
Creating a Confirming Order	31
Creating an Order to an Un-Registered Supplier (formerly Ad-Hoc Order).....	42
Creating a PCO (PCard Order)	51
Approvals	55
Adding an Ad Hoc Approver	56
Checking your Orders Approval Flow.....	58
Managing your SPCC in eVA	60
<i>How to load your SPCC to eVA</i>	<i>60</i>
<i>How to update and remove your SPCC.....</i>	<i>62</i>
<i>How to associate others with your SPCC (ad hoc approver process).....</i>	<i>63</i>
<i>How to add or remove a SPCC onto a requisition</i>	<i>66</i>
<i>How to Order on Behalf of Another User</i>	<i>68</i>
Searching for Suppliers, Orders, & Requisitions.....	69
<i>Suppliers outside of a requisition</i>	<i>69</i>
<i>To search the within New eVA (outside of creating a requisition).....</i>	<i>69</i>

<i>Requisitions</i>	71
<i>Orders</i>	72
Adding Attachments to a Requisition	73
Adding a Contract Number to a Line Item.....	77
Breaking Out Shipping Charges	77

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.

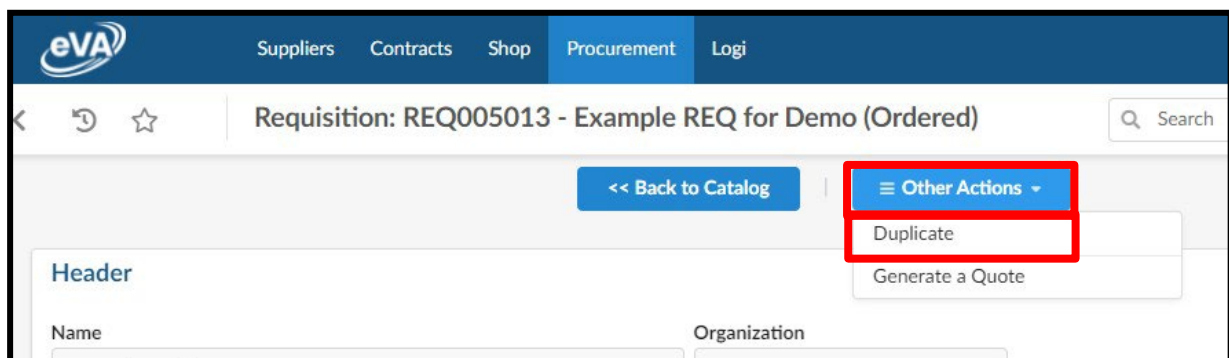
SPCC no longer can be edited

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**.

PO: PO3553398 - Req. 4/6/2022-Unregistered Supplier - Unregistered Supplier (Ord...

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.

Requisition: REQ192051 - Jeremy Test 02 (In progress)

Header

Name: Jeremy Test 02 Organization: A216-JMU Purchasing

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) Add New Item(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 Piker Doug

Order Date 3/11/2022

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

Internal Order

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

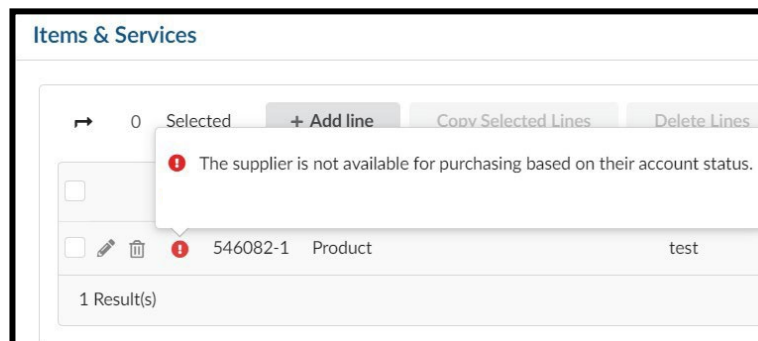
The New eVA platform no longer allows you to select a checkbox for an attachment to be visible to supplier or internal only. Rather when adding the attachment(s) you will need to select if it is an **Internal Attachment** or a **Supplier Document**, after that selection has been made you can't switch 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

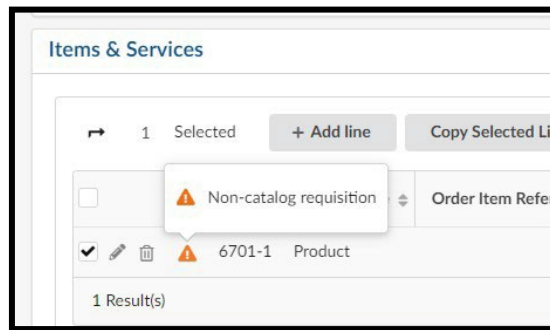
Vendors may not get your orders electronically

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.

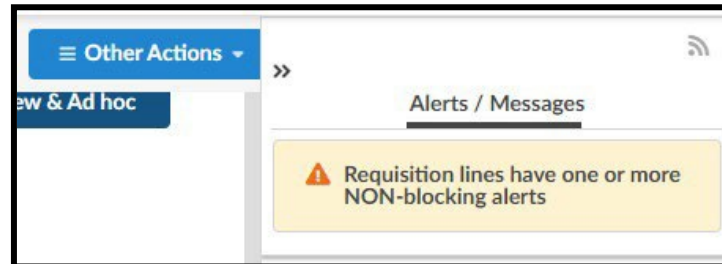
Non-catalog requisitions and purchase orders display a warning icon

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

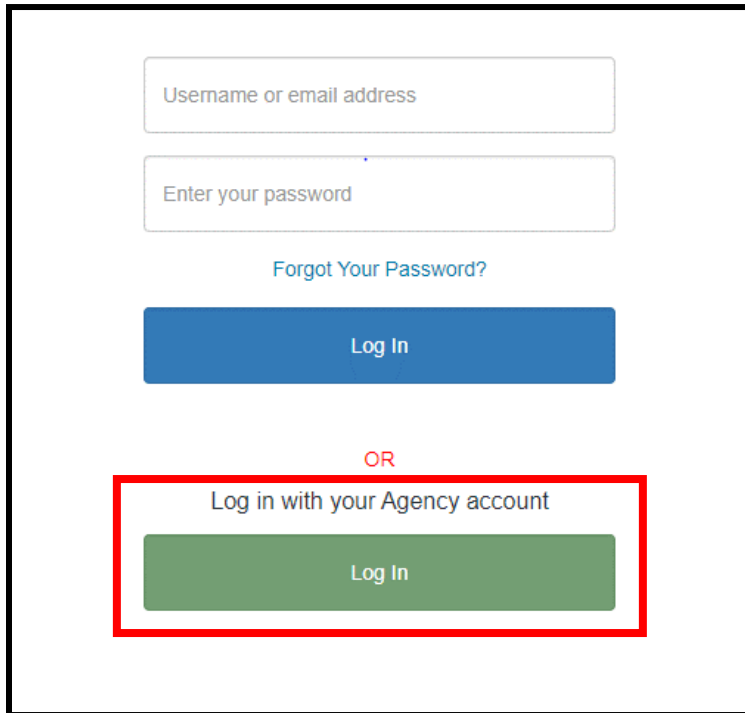


On the top right



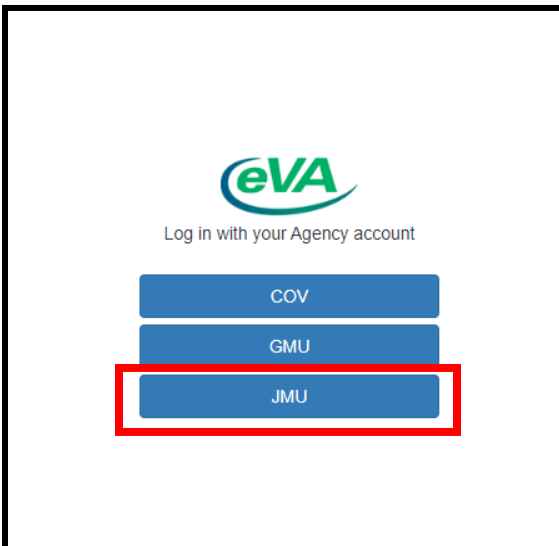
Signing into eVA

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 is for standard login, featuring a text input field labeled "Username or email address", a password input field labeled "Enter your password", a link for "Forgot Your Password?", and a blue "Log In" button. Below this, separated by a red "OR", is a second section for logging in with an Agency account. This section is highlighted with a red rectangular border and contains the text "Log in with your Agency account" and a green "Log In" button.

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



The screenshot shows the eVA logo at the top, followed by the text "Log in with your Agency account". Below this text are three blue buttons stacked vertically, labeled "COV", "GMU", and "JMU". The "JMU" button is highlighted with a red rectangular border.

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

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.

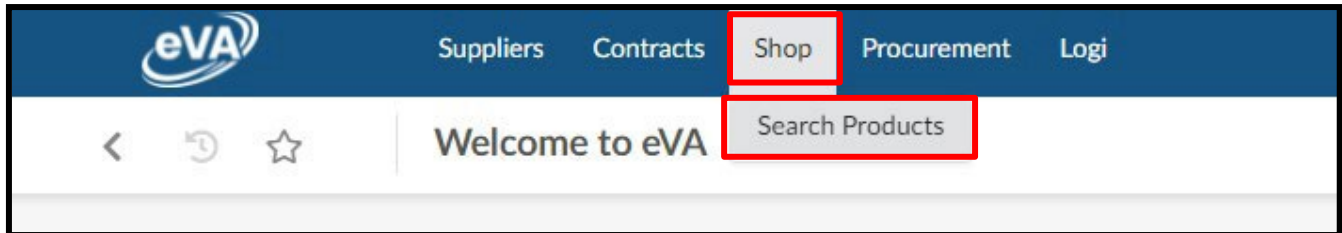
- Windows users: Close all web browser windows.
- Mac users: Quit your web browser

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

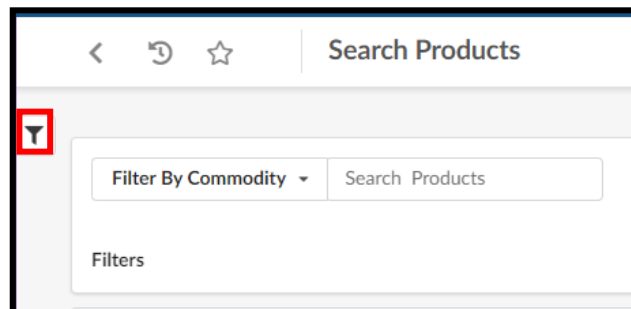
Creating a Punchout Catalog Order

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**

The screenshot shows a filter menu with the following options:

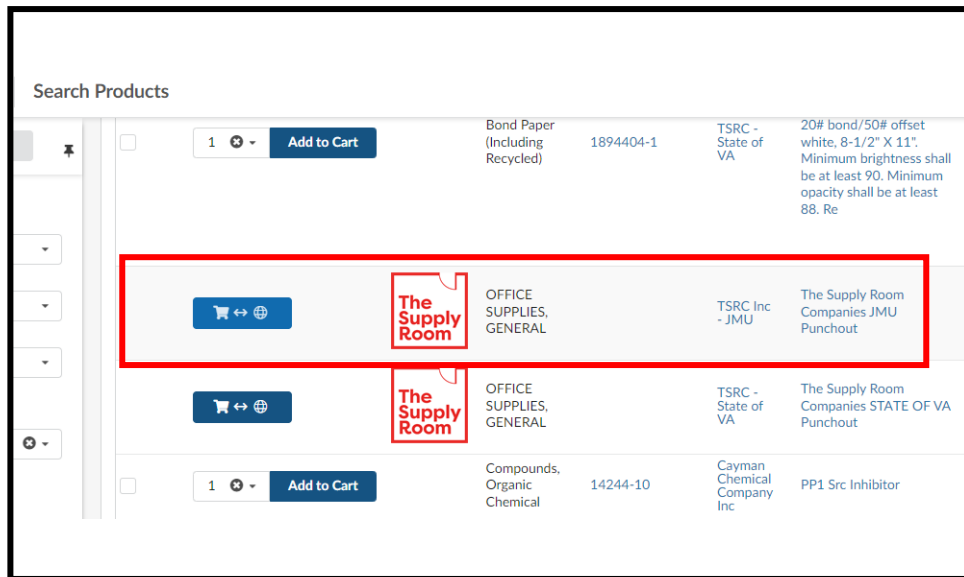
- Search** (highlighted with a red box)
- Reset
- Commodity (dropdown)
- Contract (dropdown)
- Supplier (dropdown)
- ☐ Favorite Suppliers
- Status (dropdown)
- ☐ Display Options
- ☐ Non-Approved Items
- ☐ Generic Only
- ☒ **Punchout Only** (highlighted with a red box)
- ☐ Previously Purchased Items
- ☐ History Browse

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.

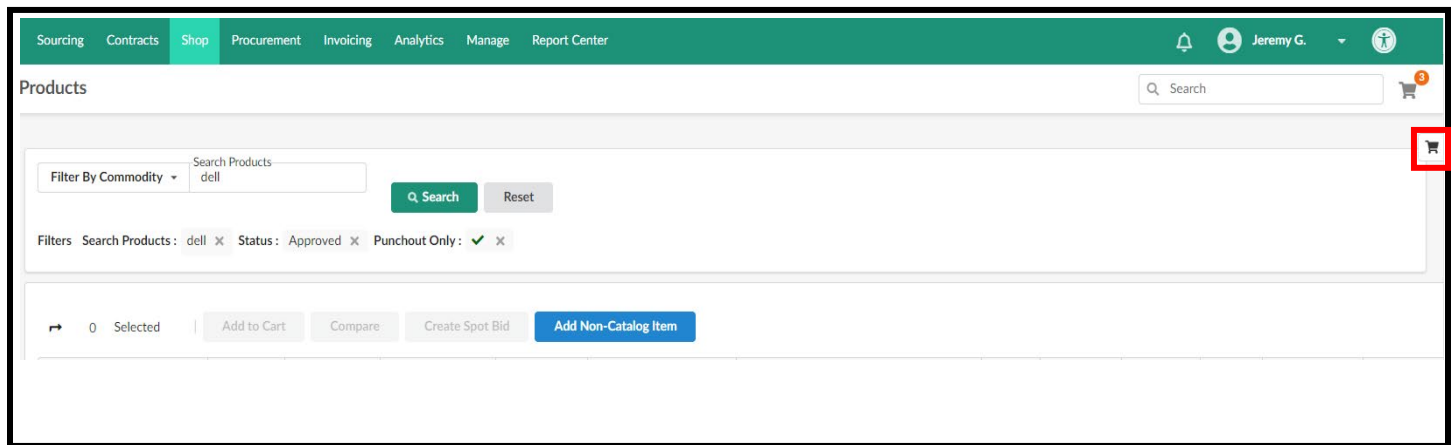
The screenshot shows the search results page with the following elements:

- Filter By Commodity** (dropdown)
- Search Products** (text input field, highlighted with a red box)
- Search** (button, highlighted with a red box)
- Reset
- Filters: Punchout Only: ☒ x
- 0 Selected
- Buttons: Add to Cart, Compare, Create Spot Bid
- Table with columns: Order, Image, Commodity, Product Code, Supplier
- Table rows:
 - ABRASIVES (Department of General Services)
 - Abrasives, Sandblasting (Other than Metal) (Colonial Scientific Inc)

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. When you submit your cart or checkout, eVA will take you back to the list of punchout catalogs.



7. To view the shopping cart that you just submitted from the punchout catalog, click the shopping cart icon on the right side of the screen.

8. When you click the shopping cart button, you should see the items that you just selected. From this screen, you can click "Checkout" at the bottom of your cart to begin filling out your REQ information.
- If you need to go back and add more items at a later time or date, you can pause here and come back. If you are not planning to submit the Requisition immediately, you should rename your shopping cart so that you can find it easily.
 - To rename your cart, click the pencil button next to the name of the shopping cart and enter the name of the supplier you used and the date.

The screenshot shows the 'Products' page with a search bar and filters. A shopping cart is visible on the right side, containing items like 'Staples Notepads, 8.5" x 11.7..." and 'Brother P-touch TZe-231 La...'. The cart total is 97.67000 USD. A red box highlights the 'Checkout' button at the bottom right of the cart.

9. Once you have clicked the "Checkout" button on your cart you will be redirected to the REQ screen. Complete the header information (See steps below).

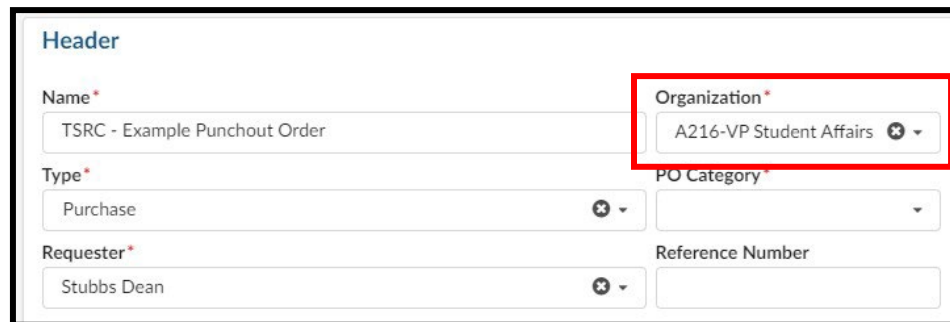
The screenshot shows the 'Header' form for a requisition. The form includes fields for Name, Organization, Type, PO Category, Requester, Reference Number, Procurement Transaction Type, Header Field 1, Header Field 2, Status, and a Workflow Preview & Ad hoc button. A red box highlights the Name, Organization, Type, PO Category, Requester, and Procurement Transaction Type fields.

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



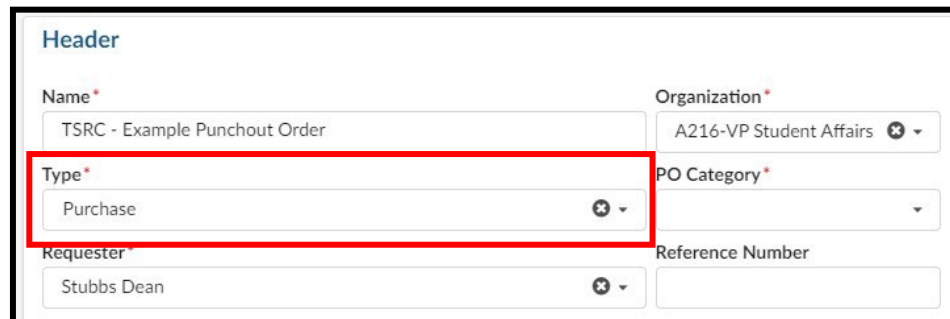
The screenshot shows a 'Header' form with the following fields: 'Name' (highlighted with a red box and containing 'TSRC - Example Punchout Order'), 'Organization' (containing 'A216-VP Student Affairs'), 'Type' (containing 'Purchase'), 'Requester' (containing 'Stubbs Dean'), 'PO Category' (empty), and 'Reference Number' (empty). Each field has a small 'x' icon in the bottom right corner.

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



The screenshot shows the same 'Header' form as in step 10. The 'Organization' field is now highlighted with a red box and contains the text 'A216-VP Student Affairs'.

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



The screenshot shows the same 'Header' form. The 'Type' field is now highlighted with a red box and contains the text 'Purchase'.

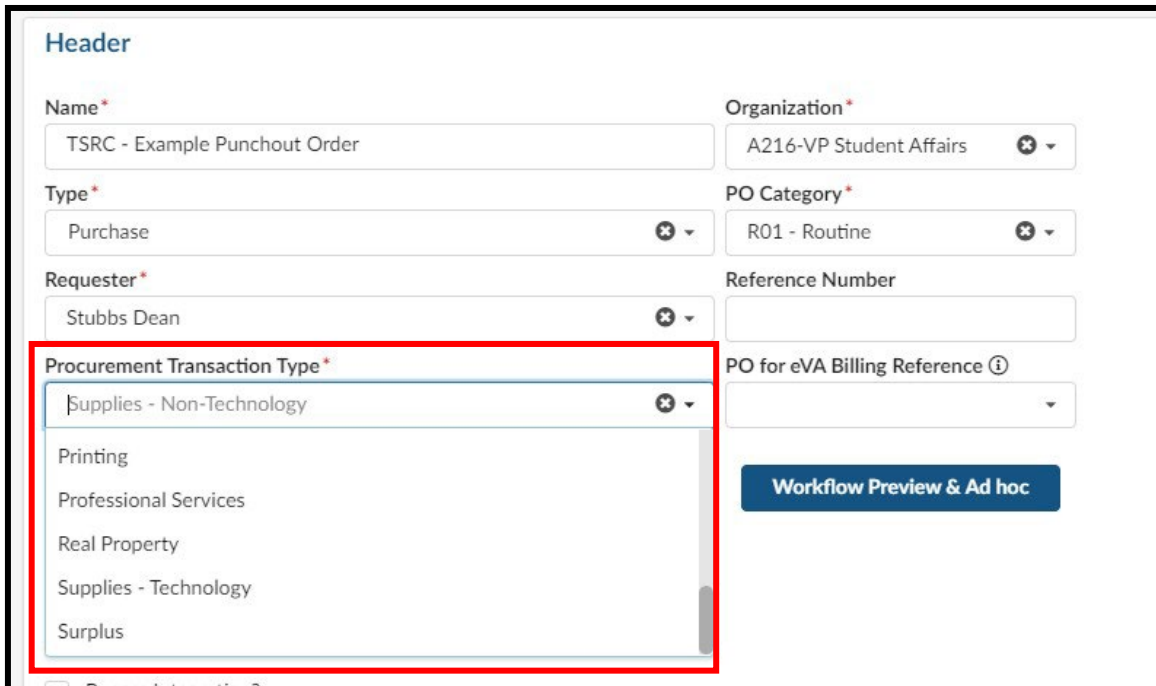
13. Select the dropdown arrow for **PO Category**, and click on the appropriate selection, typically **R01 – Routine**

The screenshot shows the 'Header' section of a form. It contains several fields with dropdown arrows: 'Name' (TSRC - Example Punchout Order), 'Organization' (A216-VP Student Affairs), 'Type' (Purchase), 'Requester' (Stubbs Dean), 'Procurement Transaction Type' (Supplies - Non-Technology), and 'Status' (Draft). The 'PO Category' dropdown 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.

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



Header

Name* TSRC - Example Punchout Order Organization* A216-VP Student Affairs

Type* Purchase PO Category* R01 - Routine

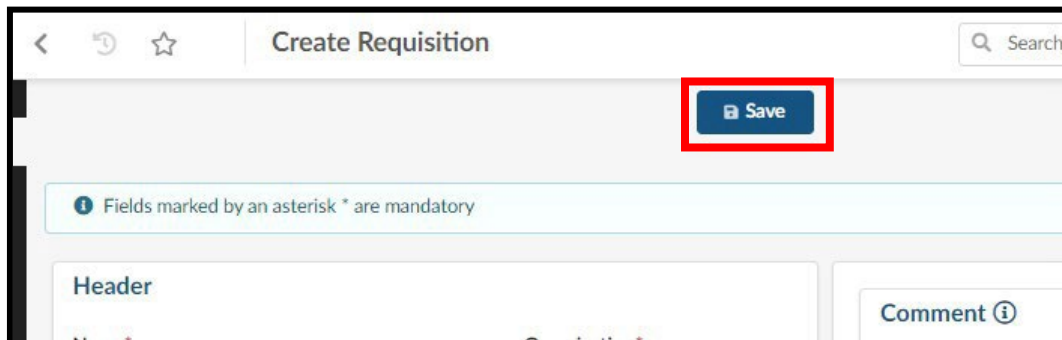
Requester* Stubbs Dean Reference Number

Procurement Transaction Type*
 Supplies - Non-Technology
 Printing
 Professional Services
 Real Property
 Supplies - Technology
 Surplus

PO for eVA Billing Reference ⓘ

Workflow Preview & Ad hoc

15. 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



< ⌚ ☆ Create Requisition 🔍 Search

Save

ⓘ Fields marked by an asterisk * are mandatory

Header

Comment ⓘ

16. 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

<input type="checkbox"/>	#	Product Type	Order Item Reference	Item Description	Supplier
<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)

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

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

<input checked="" type="checkbox"/>	#	Product Type	Order Item Reference	Item Description	Supplier
<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)

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

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

20. 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

21. 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

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

Set Allocations

Apply & Close Close

Allocations

23. 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

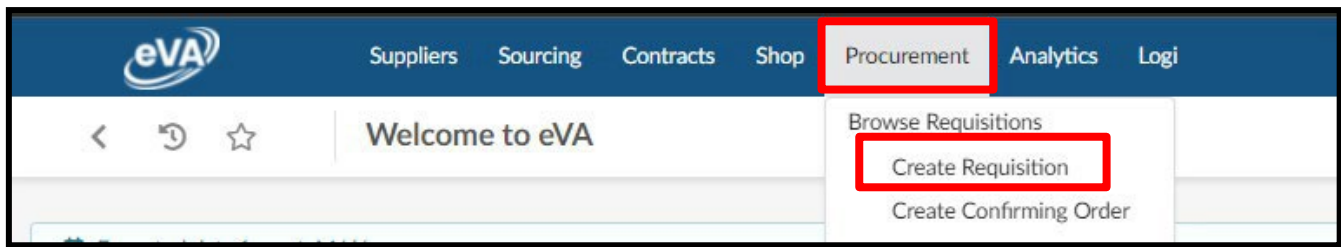
Name* Organization*

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.

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

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

The screenshot shows a form titled "Header" with several fields. The "Name" field contains "Non-Catalog Order". The "Organization" dropdown is set to "A216-Athletics". The "Type" dropdown is set to "Purchase" and is highlighted with a red rectangle. The "PO Category" dropdown is empty.

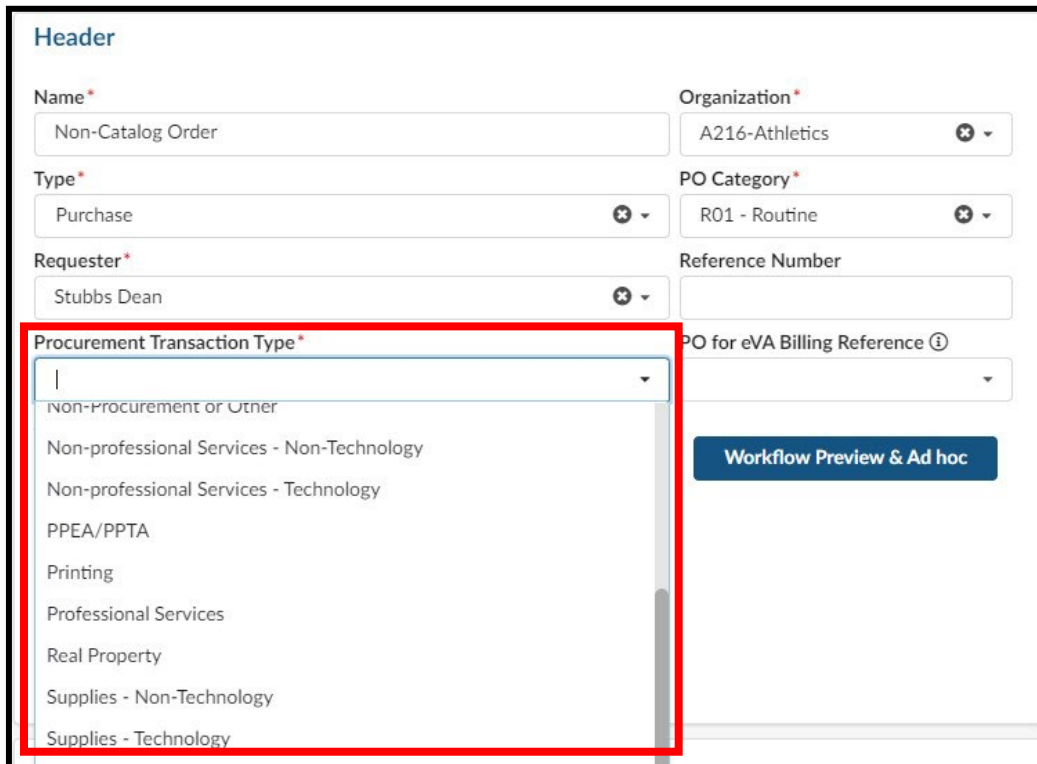
5. Select the dropdown arrow for **PO Category**, and click on the appropriate selection

The screenshot shows the same "Header" form, but the "PO Category" dropdown menu is open, showing a list of options: "E01 - Emergency", "P01 - Proprietary", "R01 - Routine", and "S01 - Sole Source". The dropdown menu is highlighted with a red rectangle. The "Type" field is still set to "Purchase".

PO Category Refresher:

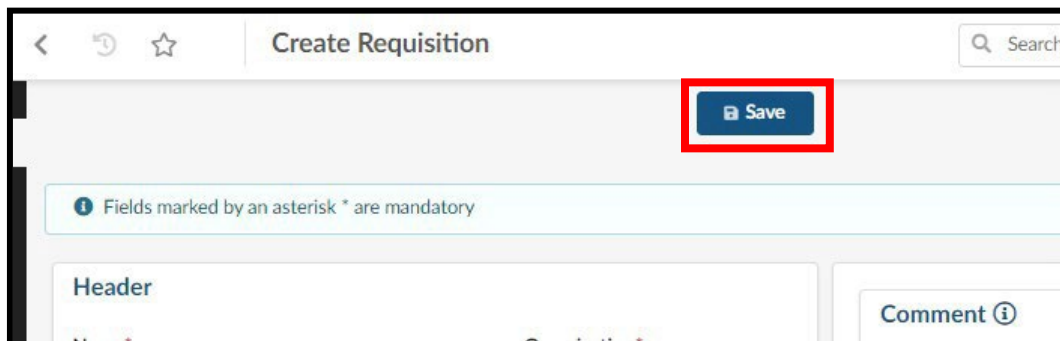
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- **R01** – Used for most all requisitions in eVA
- S01 – Used for situations in which a purchase is for a good that is truly a sole source and requires approval from Procurement Services
- VE1 – Do not use
- VP1 – Do not use
- VR1 – Do not use
- VS1 – 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 'Create 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 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 with the 'Save' button highlighted by a red border. The button is located in the top right corner of the form. Below the button, there is a message: 'Fields marked by an asterisk * are mandatory'. The 'Header' section of the form is visible below the message.

8. 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*)

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 h

☐ Create Blanket Purchase Order
☐ Bypass Integration?

Items & Services

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*

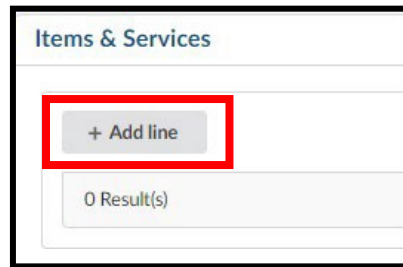
JMU - Accounts Payable MSC 5712
1031 South Main Street Mass Hall
Harrisonburg

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**.

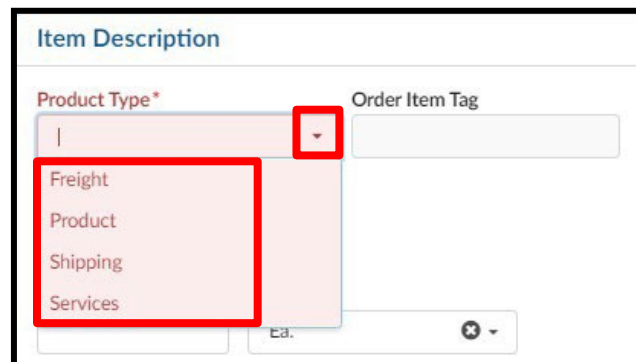
9. Under Items & Services, click **+Add line**



10. The Item Details pop-up window will display

 A screenshot of a "Item Details" pop-up window. At the top, there are buttons for "Save", "Save & Close", and "Close". Below these 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", "Item Type", "Short Description", "Detailed Description*", "Order Qty*" (with a unit dropdown "Ea."), "Commodity*", and "Delivery Date". The "Estimate Costs" section includes "Unit Price" and "USD" with a currency dropdown. There is also 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



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.

Item Description

Product Type*
Product

Order Item Tag

Item Type
Non-Catalog

Short Description
Furnish and Deliver Quote ABC123 - Item Number XYZ456, QTY 1. See Attached Quote. Call to arrange delivery with Doug Piker at x-XxXx

Detailed Description*
Furnish and Deliver Quote ABC123 - Item Number XYZ456, QTY 1. See Attached Quote. Call to arrange delivery with Doug Piker at x-XxXx

Order Qty*
1.00000 Ea.

Commodity*
20676 - Printers, 3D

Delivery Date

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

Detailed Description
Furnish and Deliver Quote ABC123 - Item Number XYZ456, Qty 1. See Attached Quote. Call to arrange delivery with Doug Piker at 8-3151.

Order Qty*
1 Ea.

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.

Order Qty*
1 Ea.

Commodity*
20676 - Printers, 3D

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

Item Description

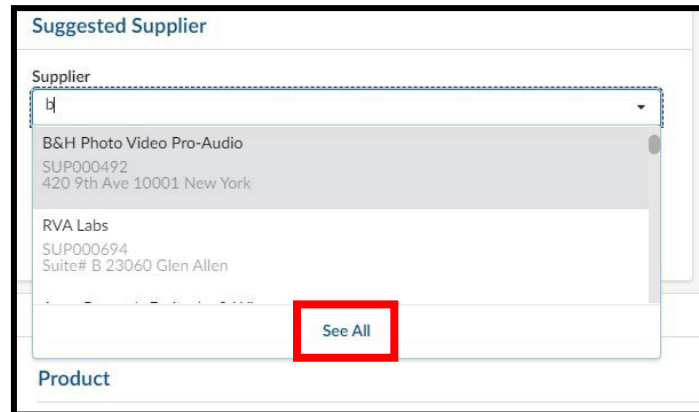
Product Type*
Product

Order Item Tag

Estimate Costs

Unit Price
5529 USD

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.

Browse Suppliers Close

Keywords: BSN Sports Alerts: Commodity: ☐ My Commodities ☐ Favorite only ☒ Tier 1 Supplier Only Search

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

Create Supplier

	Code	Supplier	Web site	Status	Qualification	Document Status	Network	Risk Level	
<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. 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

Save
Save & Close
Close

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

A
☐

B
☐

#
Product Type
Order Item Reference
Item Description
Supplier

6290-1
Product
Furnish and Deliver Quote ABC123
(B&H Photo Video Pr

1 Result(s)

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

The screenshot shows the 'Items & Services' window. At the top, there are buttons: '+ Add line', 'Copy Selected Lines', 'Delete Lines', 'Edit Lines', and 'Set Allocations'. The 'Set Allocations' button is highlighted with a red rectangle. Below the buttons is a table with columns: #, Product Type, Order Item Reference, Item Description, and Supplier. A single row is visible with the following data: # 6290-1, Product Type Product, Order Item Reference Furnish and Deliver Quote ABC123, and Supplier (B&H Photo Video Pro-A). At the bottom, it says '1 Result(s)'.

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

The screenshot shows the 'Set Allocations' window. At the top, there are buttons: 'Apply & Close' and 'Close'. Below them is a section titled 'Allocations'. Under 'Allocations', there is a 'Chart of Account' dropdown menu set to 'James Madison University'. Below that is a '+ Allocation' button, which is highlighted with a red rectangle, and a 'Template List' dropdown menu. At the bottom, there is a table with columns: %, Fiscal year*, Department*, Account*, Acc. Cross Reference, and Organization ⓘ*.

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

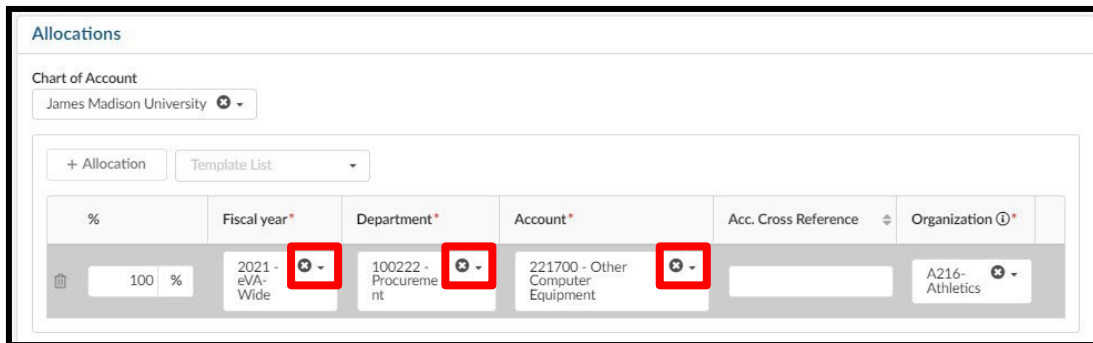
The screenshot shows the 'Allocations' window. At the top, there is a 'Chart of Account' dropdown menu set to 'James Madison University'. Below that is a '+ Allocation' button and a 'Template List' dropdown menu. At the bottom, there is a table with columns: %, Fiscal year*, Department*, Account*, Acc. Cross Reference, and Organization ⓘ*. A new row has been added to the table, with the following data: % (empty), Fiscal year* (empty), Department* (empty), Account* (empty), Acc. Cross Reference (empty), and Organization ⓘ* set to '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.

The screenshot shows the 'Allocations' window. At the top, there is a 'Chart of Account' dropdown menu set to 'James Madison University'. Below that is a '+ Allocation' button and a 'Template List' dropdown menu. At the bottom, there is a table with columns: %, Fiscal year*, Department*, Account*, Acc. Cross Reference, and Organization ⓘ*. A new row has been added to the table, with the following data: % set to '100', Fiscal year* (empty), Department* (empty), Account* (empty), Acc. Cross Reference (empty), and Organization ⓘ* set to 'A216-Athletics'. The '100' in the percentage field is highlighted with a red rectangle.

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.



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

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



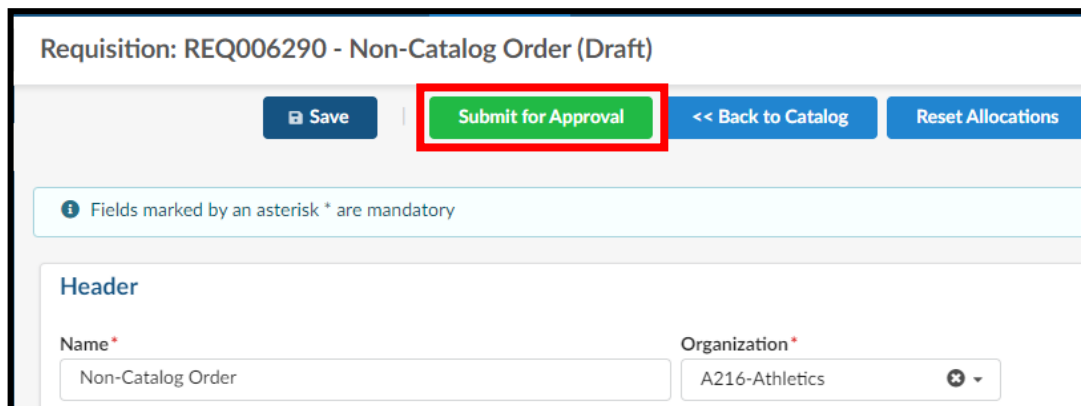
Set Allocations

Apply & Close Close

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, 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



Requisition: REQ006290 - Non-Catalog Order (Draft)

Save Submit for Approval << Back to Catalog Reset Allocations

Fields marked by an asterisk * are mandatory

Header

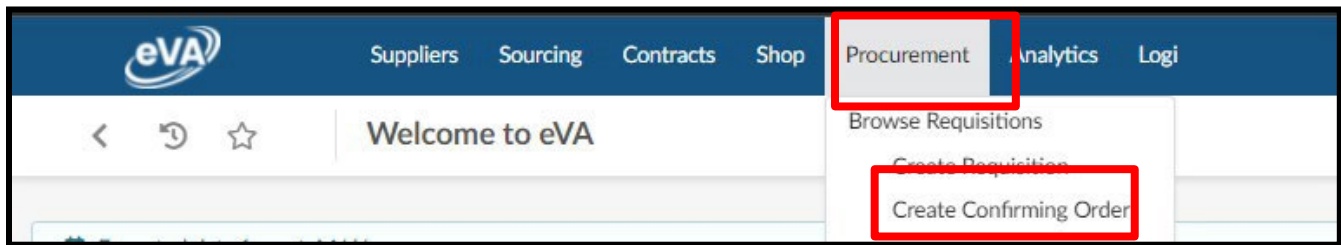
Name* Organization*

Non-Catalog Order 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*)

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

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

The screenshot shows the 'Header' section of the eVA system. The form includes fields for Name, Organization, Type, Requester, Procurement Transaction Type, and Status. The 'PO Category' dropdown menu is open, displaying a list of options. A red box highlights the dropdown arrow and the list of options.

Header

Name*
Confirming Order Example

Organization*
A216-VP Academic Affairs

Type*
Confirming Order

Requester*
Piker Doug

Procurement Transaction Type*
[Empty]

Status
Draft

PO Category*
[Dropdown Arrow]

PO Category 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

☐ Open Requisition

☐ Bypass Integration?

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*

Organization*

Type*

PO Category*

Requester*

Reference Number

Procurement Transaction Type*

PO for eVA Billing Reference ⓘ

Workflow Preview & Ad hoc

Non-professional Services - Non-Technology

Non-professional Services - Technology

PPEA/PPTA

Printing

Professional Services

Real Property

6. After completing the required fields, click **Save**
 - If any of the required 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
 - Notice the Status will now be in (Draft)
 - You can now add Items & Services (*Formerly Line Items*)

Fields marked by an asterisk * are mandatory

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*

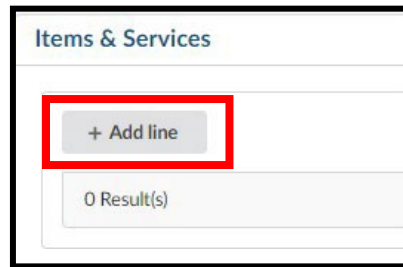
JMU - Accounts Payable MSC 5712
1031 South Main Street Mass Hall
Harrisonburg

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**.

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



9. 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, a note states: 'Fields marked by an asterisk * are mandatory' and 'Expected date format: M/d/yyyy'. The form 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 showing 'Ea.'), 'Commodity*', and 'Delivery Date'. The 'Estimate Costs' section includes a 'Unit Price' field and a currency dropdown set to 'USD'.

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

 A screenshot of the 'Item Description' section from the 'Item Details' window. The 'Product Type*' dropdown menu is open, showing a list of options: 'Freight', 'Product', 'Shipping', and 'Services'. The dropdown arrow is highlighted with a red square, and the entire list of options is enclosed in a red rectangular box. The 'Order Item Tag' field is visible to the right of the dropdown.

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 'Order Item Tag' and 'Item Type' fields are empty. The 'Short Description' field is highlighted with a red box. The 'Detailed Description' field is also highlighted with a red box and contains the text: 'Confirming order for website order placed on 12/34/56'. 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 'Order Item Tag' and 'Item Type' fields are empty. 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 highlighted with a red box and contains the text '1Q'. The unit is 'Ea.'.

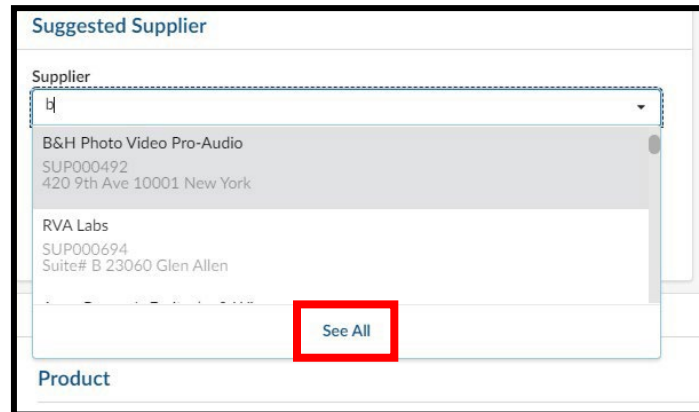
14. In the **Commodity** field, click in the field and begin typing the commodity name. The system will begin to populate available results that match. Once you find the best fitting commodity, click on the result in the listing to select it.

The screenshot shows the 'Item Description' form. The 'Product Type' is set to 'Services'. The 'Order Item Tag' and 'Item Type' fields are empty. 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' is set to 10, and the unit is 'Ea.'. The 'Commodity' field is highlighted with a red box, and it displays '20676 - Printers, 3D'.

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 and the 'Estimate Costs' section. The 'Item Description' form is the same as in the previous screenshot. The 'Estimate Costs' section is highlighted with a red box, and it shows the 'Unit Price' field with the value '1500' and the currency 'USD'.

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.

Browse Suppliers Close

Keywords: Alerts: Commodity: ☐ My Commodities ☐ Favorite only ☒ Tier 1 Supplier Only **Search**

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

Create Supplier

	Code	Supplier	Web site	Status	Qualification	Document Status	Network	Risk Level	Pe
<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					

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

Save
Save & Close
Close

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

<input type="checkbox"/>	#	Product Type	Order Item Reference	Item Description	Supplier
<input 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*)

The screenshot shows the 'Items & Services' window. At the top, there are buttons: '+ Add line', 'Copy Selected Lines', 'Delete Lines', 'Edit Lines', and 'Set Allocations'. The 'Set Allocations' button is highlighted with a red box. Below the buttons, there is a table with columns: #, Product Type, Order Item Reference, Item Description, and Supplier. A single row is visible with the following data: # 6701-1, Product Type Product, Order Item Reference Confirming order for order already placed, and Supplier (B&H Photo Video Pro-Audio).

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

The screenshot shows the 'Set Allocations' window. At the top, there are buttons: 'Apply & Close' and 'Close'. Below these, there is a section titled 'Allocations'. Under 'Allocations', there is a 'Chart of Account' dropdown menu set to 'James Madison University'. Below this, there is a '+ Allocation' button highlighted with a red box, and a 'Template List' dropdown menu. Below these, there is a table with columns: %, Fiscal year*, Department*, Account*, Acc. Cross Reference, and Organization ⓘ*.

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

The screenshot shows the 'Allocations' window. At the top, there is a 'Chart of Account' dropdown menu set to 'James Madison University'. Below this, there is a '+ Allocation' button and a 'Template List' dropdown menu. Below these, there is a table with columns: %, Fiscal year*, Department*, Account*, Acc. Cross Reference, and Organization ⓘ*. A new row has been added to the table with the following data: % 100 %, Fiscal year* (empty), Department* (empty), Account* (empty), Acc. Cross Reference (empty), and Organization ⓘ* A216-Athletics.

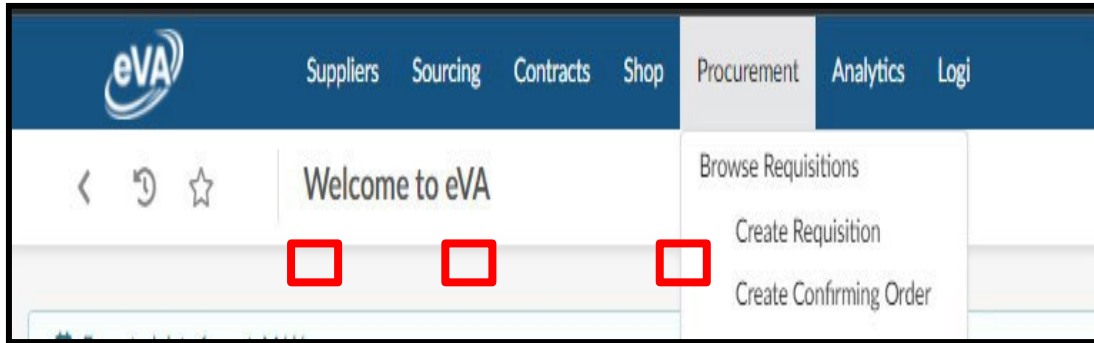
24. In the % (Percentage) field enter the appropriate percentage

- 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.

The screenshot shows the 'Allocations' window. At the top, there is a 'Chart of Account' dropdown menu set to 'James Madison University'. Below this, there is a '+ Allocation' button and a 'Template List' dropdown menu. Below these, there is a table with columns: %, Fiscal year*, Department*, Account*, Acc. Cross Reference, and Organization ⓘ*. A new row has been added to the table with the following data: % 100 %, Fiscal year* (empty), Department* (empty), Account* (empty), Acc. Cross Reference (empty), and Organization ⓘ* A216-Athletics. The percentage field '100 %' is highlighted with a red box.

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.

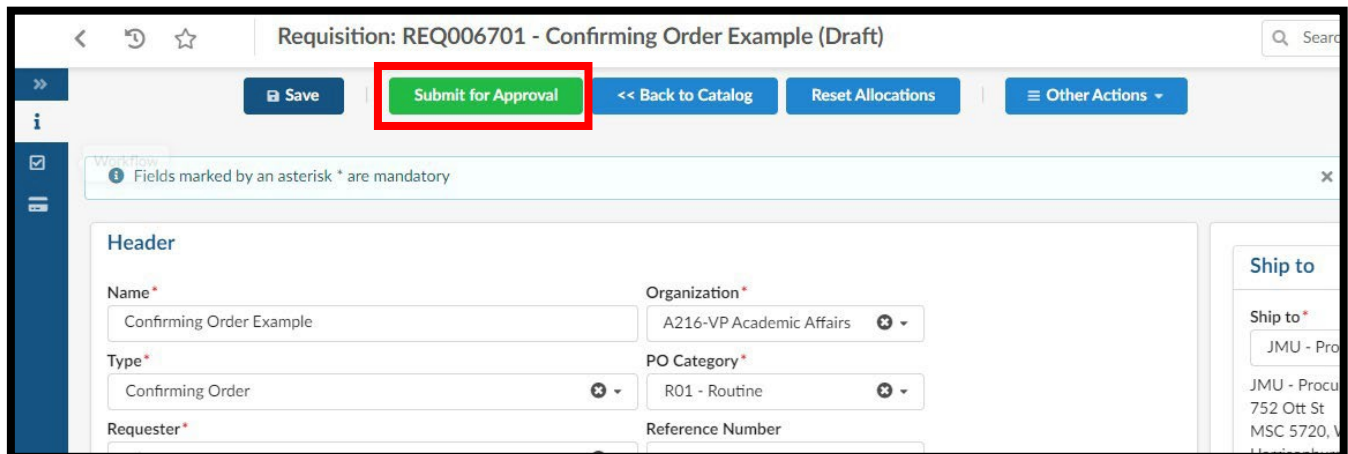


26. At the top of the Set Allocations window, click the **Apply & Close** option



27. You can now submit the requisition. At the top of the page, click **Submit for Approval**

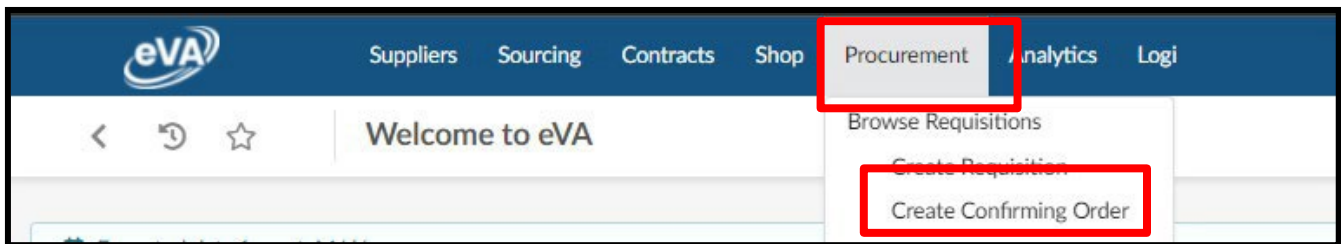
- If the requisition is not within your expenditure authority, your approver will need to approve it.
- In some situations, bases on the items purchased or the dollar amount, the requisition may require approval from Procurement Services.
- See the section on [PO Print Suppliers](#) for more information, if applicable



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*)

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

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

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

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

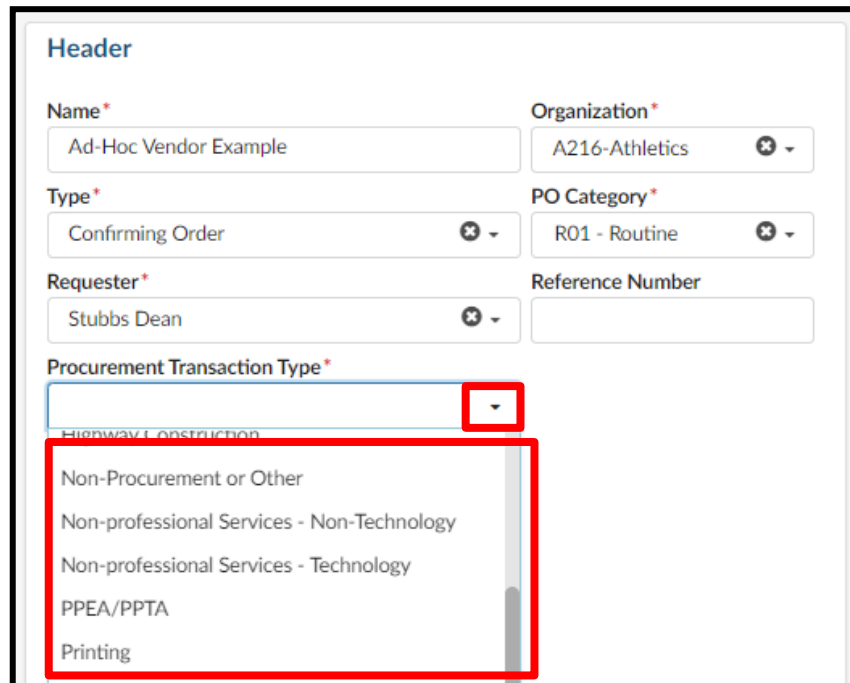
The **PO Category*** dropdown menu is open, showing the following options:

- 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

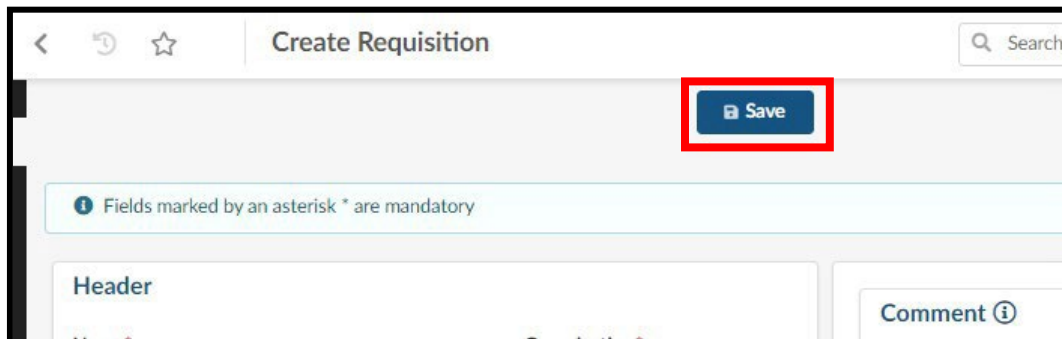
Type* Confirming Order PO Category* R01 - Routine

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**
- 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
 - Notice the Status will now be in (Draft)
 - 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?

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

Items & Services

0 Selected + Add line

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

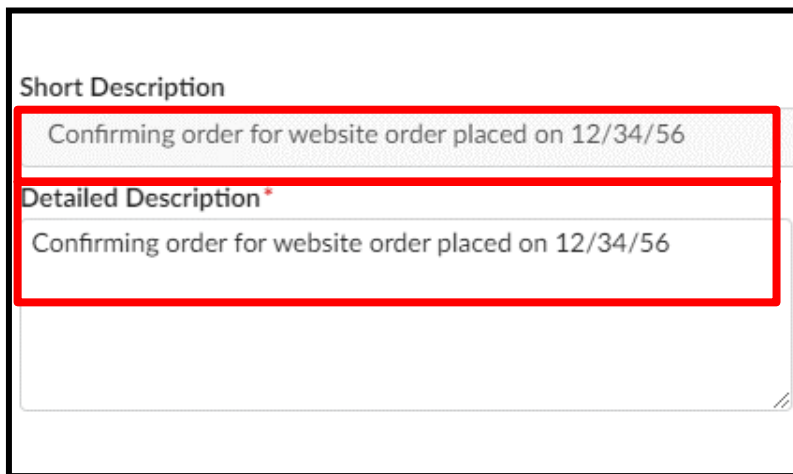
+ Add line

0 Result(s)

9. The Item Details pop-up window will display

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

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
 - Please note that the Detailed Description field is mandatory, you must enter something.



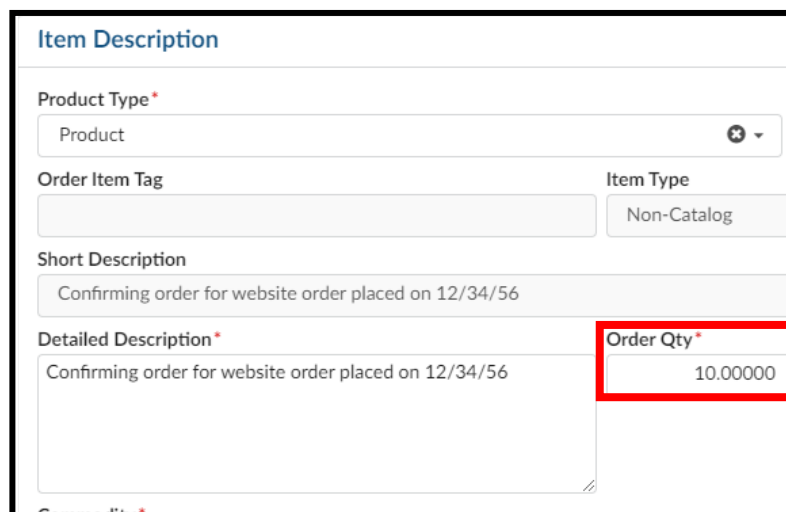
Short Description

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*
Product

Order Item Tag

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

Detailed Description*
Confirming order for website order placed on 12/34/56

Commodity*
20676 - Printers, 3D

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*
Product

Order Item Tag

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

Detailed Description*
Confirming order for website order placed on 12/34/56

Item Type
Non-Catalog

Order Qty*
10.00000 Ea.

Estimate Costs

Unit Price
1,500.00000 USD

Deliver To

Deliver To
Jeremy Good

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

A ☐ **B** ☐

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

1 Result(s)

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

The screenshot shows a table with columns: #, Product Type, Order Item Reference, Item Description, and Supplier. The first row contains the values: 1888-1, Product, Ad-Hoc Vendor Example Description, and (Unregistered Supplier) Unregistered Supplier. The 'Set Allocations' button is highlighted in a red box in the top right corner of the interface.

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

The screenshot shows the 'Set Allocations' window. It has a 'Chart of Account' dropdown set to 'James Madison University'. Below this, there is a '+ Allocation' button and a 'Template List' dropdown. The '+ Allocation' button is highlighted in a red box. Below these are fields for %, Fiscal year*, Department*, Account*, Acc. Cross Reference, and Organization ⓘ*.

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

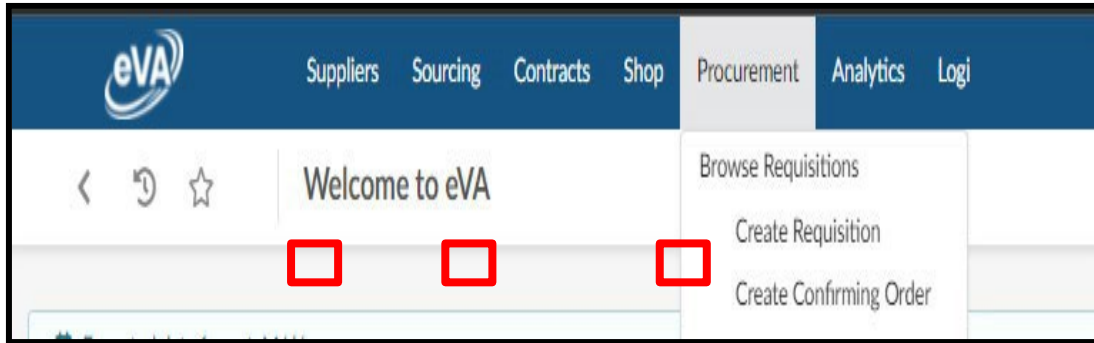
The screenshot shows the 'Allocations' window. It has a 'Chart of Account' dropdown set to 'James Madison University'. Below this, there is a '+ Allocation' button and a 'Template List' dropdown. A new row has been added to the table with the following values: %, %, %, %, %, and A216-Athletics ⓘ*.

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 'Allocations' window. It has a 'Chart of Account' dropdown set to 'James Madison University'. Below this, there is a '+ Allocation' button and a 'Template List' dropdown. A new row has been added to the table with the following values: %, 100 %, %, %, %, and A216-Athletics ⓘ*. The '100 %' field is highlighted in a red box.

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.

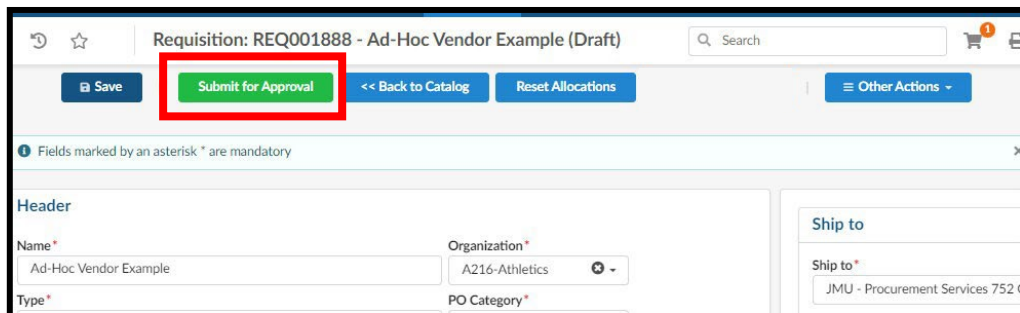


25. At the top of the Set Allocations window, click the **Apply & Close** option



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



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.

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

Procurement Transaction Type* Supplies - Non-Technology

Save

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.

Purchase Requisition

Save Back to Catalog Create Solicitation

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

Procurement Transaction Type* Supplies - Non-Technology

Header Field 1 Header Field 2

Status Draft Workflow Preview & Ad hoc

Pcard

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.

Purchase Requisition

Save

Fields marked by an asterisk * are mandatory

Pcard

Select Applicable Pcard

Jeremy Good

See All

Pcard

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

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

Suggested Supplier

Supplier

1 OrderAnything

Fulfillment Supplier

1 OrderAnything

Supplier Contact

eVA Suppliers Sourcing Contracts Shop Procurement Analytics Logi

Welcome to eVA

Browse Requisitions

Create Requisition

Create Confirming Order

- 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

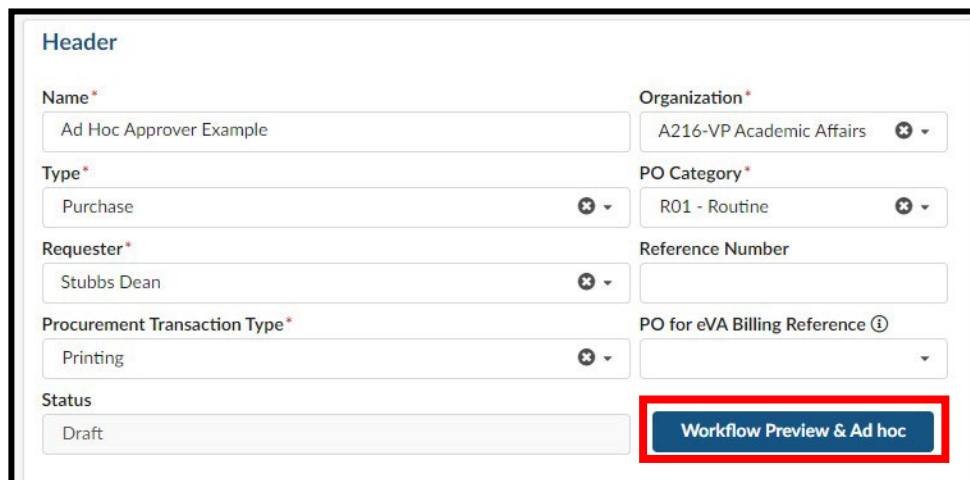
Name *	Organization
New Buyer Inbox with Ad-Hoc for SPCC Use Test	A216-JMU
Type *	PO Category
Purchase	R01 - Rout

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

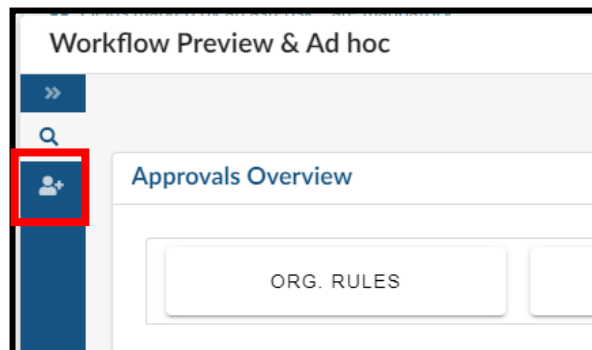
This section covers the process to add an ad hoc approver onto a requisition. If you are completing this process to utilize another eVA user's SPCC, review the [How to associate others with your SPCC](#) section for details on this process.

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.

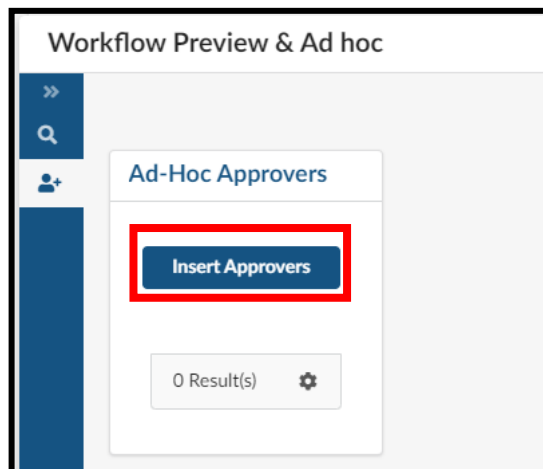


The screenshot shows the 'Header' section of a requisition form. It contains several fields: 'Name' (Ad Hoc Approver Example), 'Organization' (A216-VP Academic Affairs), 'Type' (Purchase), 'PO Category' (R01 - Routine), 'Requester' (Stubbs Dean), 'Reference Number' (empty), 'Procurement Transaction Type' (Printing), and 'PO for eVA Billing Reference' (empty). The 'Status' is set to 'Draft'. A blue button labeled 'Workflow Preview & Ad hoc' is highlighted with a red rectangle in the bottom right corner.

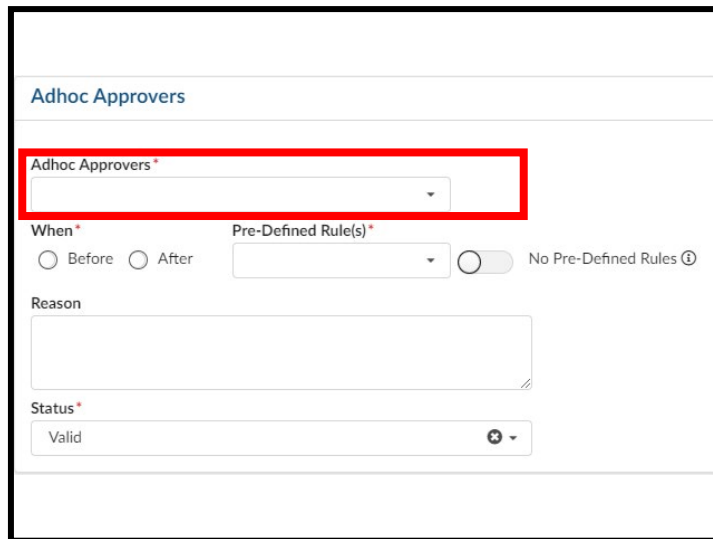
2. From the **Workflow Preview & Ad hoc** window, click the **Ad-Hoc Approver** icon



3. Click **Insert Approvers**

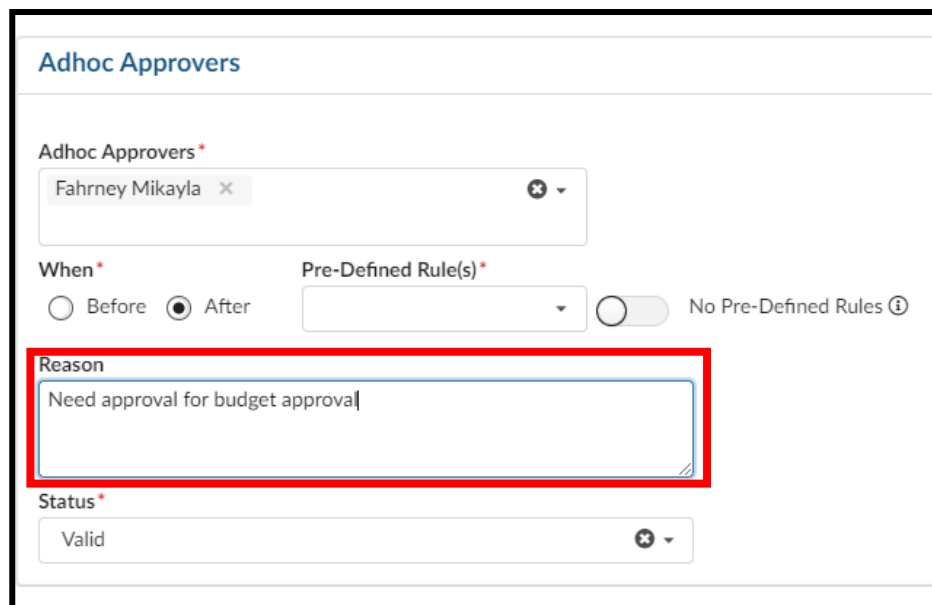


4. From the **Ad hoc Approver** window, enter the name or JMU email address of the card holder in the **Adhoc Approvers** field. The system will begin to populate available results that match. Once you find the correct individual, click on the result in the listing to select them.



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'. The 'Pre-Defined Rule(s)' section has a dropdown menu and a toggle switch for 'No Pre-Defined Rules'. The 'Reason' field is a large text area. The 'Status' field is a dropdown menu with 'Valid' selected.

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 approval'. The 'Status' field remains '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 rectangle. Below the buttons, the form contains the following fields:

- Adhoc Approvers***: A dropdown menu showing 'Fahrney Mikayla' with a close button (X) and a plus icon (+).
- When***: Radio buttons for 'Before' and 'After'. 'After' is selected.
- Pre-Defined Rule(s)***: A dropdown menu and a toggle switch. The toggle is currently off, and the text 'No Pre-Defined Rules ⓘ' is visible.
- Reason**: A text area containing 'Need approval for budget approval'.
- Status***: A dropdown menu showing 'Valid' with a plus icon (+).

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 rectangle. Below the buttons, the window contains the following elements:

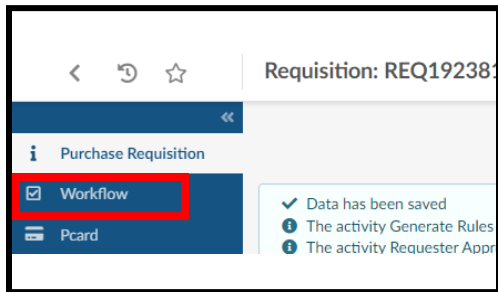
- Ad-Hoc Approvers**: A section header.
- Insert Approvers**: A blue button.
- Table**: A table with 4 columns: Order, Adhoc Approvers, Rules Description, and Reason.

Order	Adhoc Approvers	Rules Description	Reason
1	Dickens Caroline	eva_adhoc	Adding Caroline for needed budget approval
- 1 Result(s)**: A text label below the table.

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".

Approvals Overview				
ORG. RULES				
Workflow Preview				
Approval Profile	Approver	Type	Rule Label	Rule Order
Adhoc Approvers	Phillip Ewell	Adhoc Approver	Adhoc Approvers	800001
1 Result(s)				

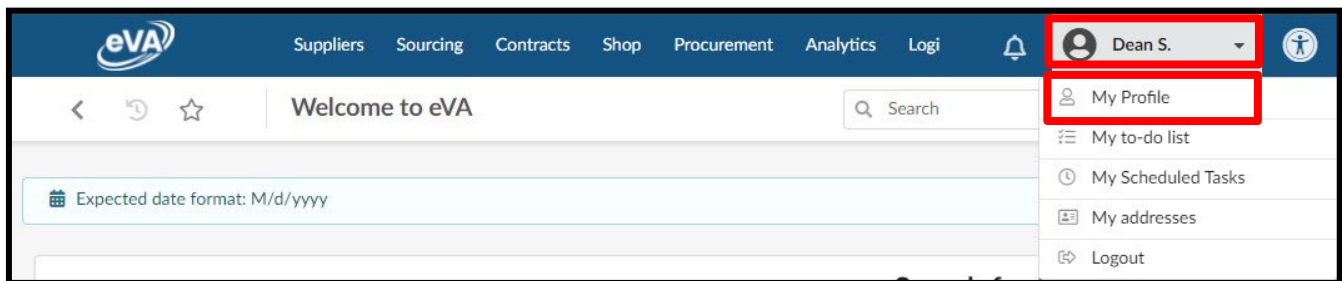
3. Under the workflow preview you can view upcoming approvals depending on the rules assigned by eVA when your order is submitted.

Managing your SPCC in eVA

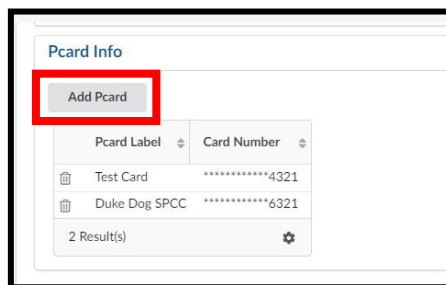
This section covers the process of loading your SPCC, deleting your SPCC, updating your SPCC, and the workaround for associating your SPCC with other users. This section will also cover how to use your SPCC on requisitions. Please note that you can only load an SPCC assigned to you in your eVA account. 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

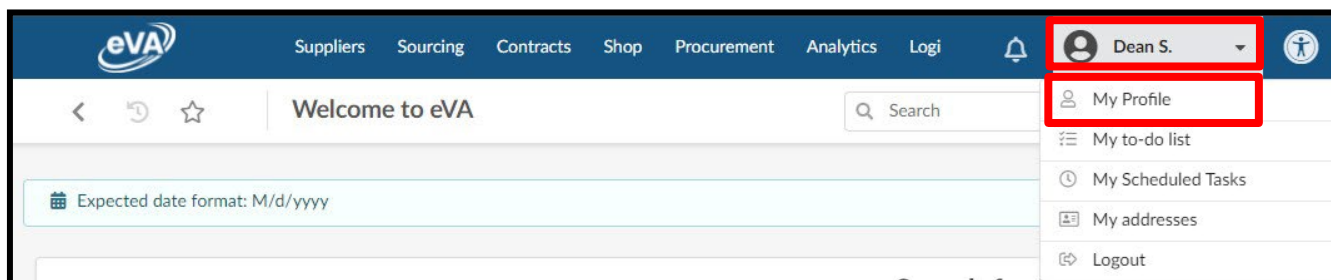
4. At the top of the Pcard Manage pop-up window, click **Save & Close**

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.

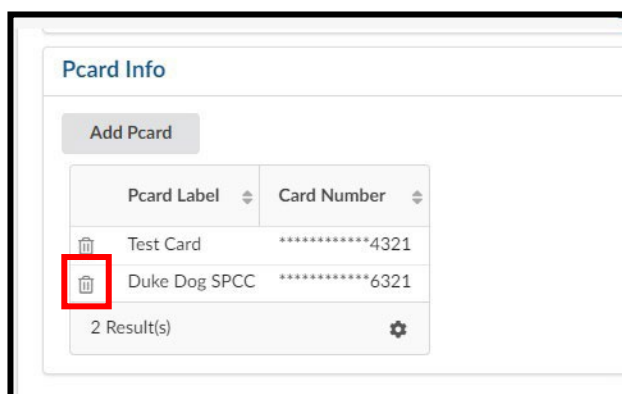
How to update and remove your SPCC

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.

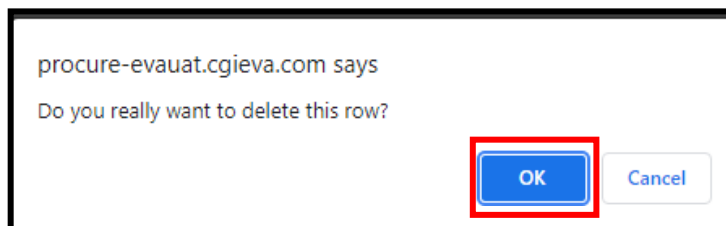
1. Click the **YOUR NAME Icon** and in the dropdown menu, click **My Profile**



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.

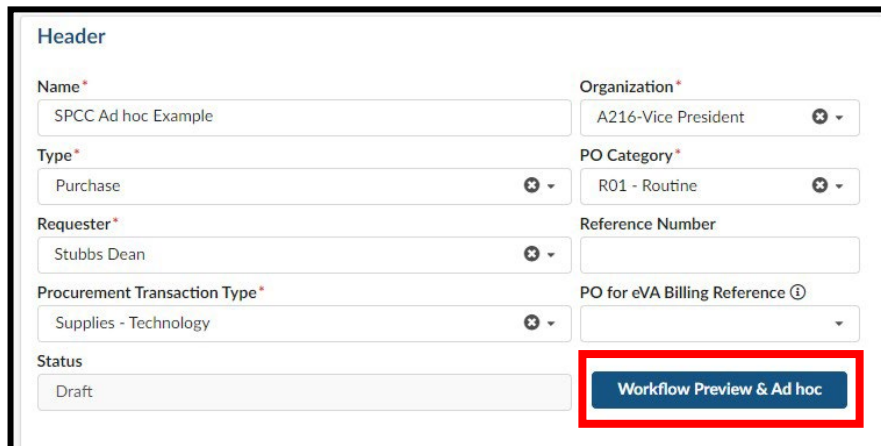


4. If you needed to update the card you just deleted, you can now re-add the card. [See How to load your SPCC to eVA](#) for the process.

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

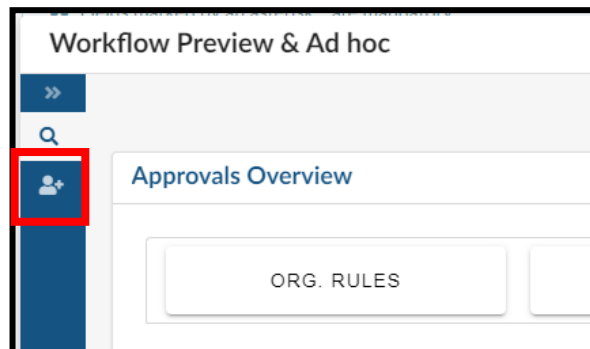
At this time, there is not an option to associate another user with your SPCC. As a result, we have a new process to use another eVA user's SPCC at the time of requisition. You will need to ad hoc the card holder onto the requisition as an approver. When the requisition routes to them for approval, they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

1. From the Requisition Header, click **Workflow Preview & Ad hoc**.
 - 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.

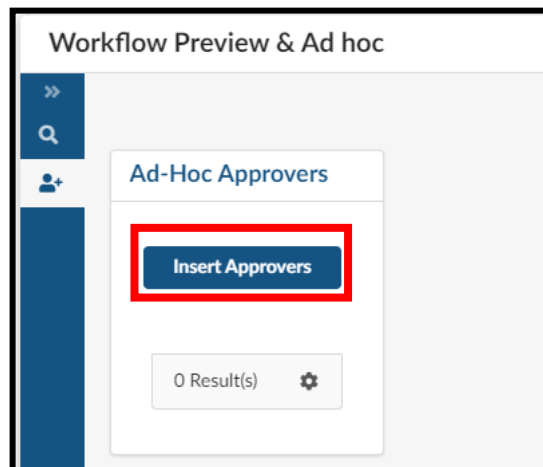


The screenshot shows the 'Header' section of a requisition form. It includes fields for Name (SPCC Ad hoc Example), Organization (A216-Vice President), Type (Purchase), PO Category (R01 - Routine), Requester (Stubbs Dean), Reference Number, Procurement Transaction Type (Supplies - Technology), PO for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

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 Approver' window. At the top right are buttons for 'Save' and 'Save & Close'. Below the title bar, there's a section titled 'Adhoc Approvers' with a sub-header 'Adhoc Approvers will be inserted at the end of the workflow.' Below this is a search field labeled 'Adhoc Approvers *' containing the text 'caroline dickens'. A dropdown menu shows the result 'Dickens Caroline'. A 'See All' link is visible below the dropdown. At the bottom, there is a 'Status *' field with the value '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
 - 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 are buttons for 'Save', 'Save & Close', and 'Close'. Below the title bar, there's a section titled 'Adhoc Approvers' with a sub-header 'Adhoc Approvers will be inserted at the end of the workflow.' Below this is a search field labeled 'Adhoc Approvers *' containing the text 'Dickens Caroline'. A dropdown menu shows the result 'Dickens Caroline'. Below the dropdown is a 'Reason' field containing the text 'Adding so Caroline can attach their SPCC to this REQ'.

6. Click **Save & Close**

The screenshot shows a window 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 rectangle. Below the buttons, the text "Adhoc Approvers" is displayed, followed by a note: "Adhoc Approvers will be inserted at the end of the workflow." There is a section for "Adhoc Approvers *" with a dropdown menu showing "Dickens Caroline" and a plus icon. Below this is a "Reason" field with the text "Adding so Caroline can attach their SPCC to this REQ".

7. 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 rectangle. Below the buttons, the text "Ad-Hoc Approvers" is displayed. There is a button labeled "Insert Approvers". Below this is a table with the following columns: "Order", "Adhoc Approvers", "Rules Description", and "Reason". The table contains one row with the following data: "1", "Dickens Caroline", "eva_adhoc", and "Adding so Caroline can attach their SPCC to this REQ". Below the table, it says "1 Result(s)".

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

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.
- 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 system interface for a requisition. The top navigation bar includes links for Suppliers, Sourcing, Contracts, Shop, and Procurement. The breadcrumb trail indicates the current location is 'Requisition: REQ002155 - Example-'. The left-hand side menu has several icons, with the Pcard icon (a document with a checkmark) highlighted by a red box. The main content area displays the 'Header' section with the following fields:

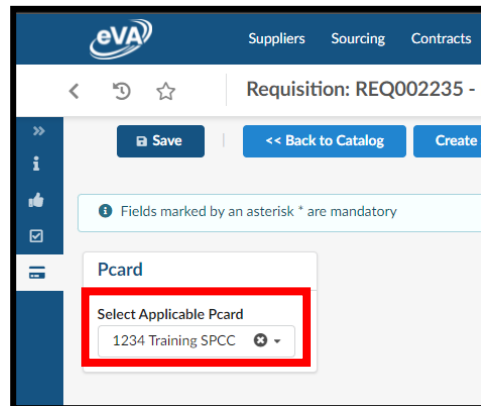
- Name***: Example- SPCC Requisition - On Behalf Of SPCC
- Type***: Purchase (dropdown menu)
- Requester***: Stubbs Dean (dropdown menu)

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

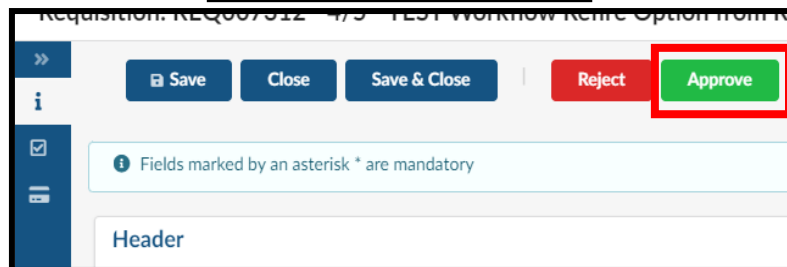
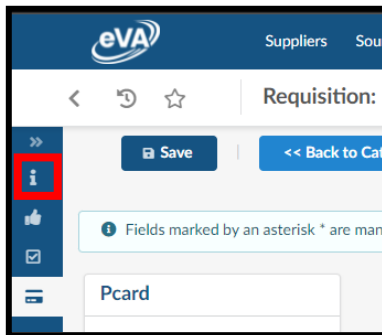
The screenshot shows the eVA system interface for a requisition. The top navigation bar includes links for Suppliers, Sourcing, Contracts, Shop, and Procurement. The breadcrumb trail indicates the current location is 'Requisition: REQ002235 - Example-'. The left-hand side menu has several icons, with the Pcard icon (a document with a checkmark) highlighted by a red box. The main content area displays the 'Pcard' section with the following fields:

- Select Applicable Pcard**: A dropdown menu with a red box around the dropdown arrow. The dropdown list is open, showing the following options: 1234 Training SPCC, Duke Dog SPCC, New Test CArD, and Test Card. The list of options is also highlighted by a red box.
- Save**: A button highlighted by a red box.

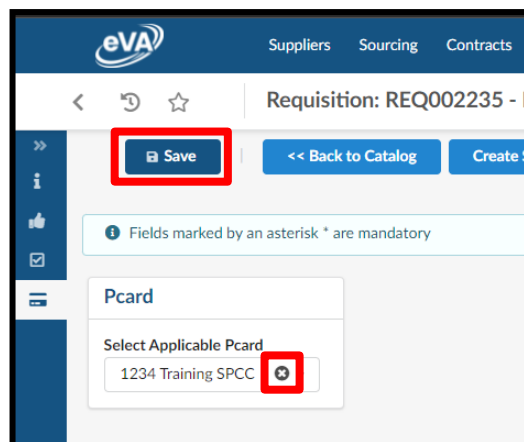
3. Once the selected SPCC is listed under **Select Applicable Pcard**, after the requisition is fully approved, it will generate a PCO. If the supplier accepts electronic orders and Pcards, the selected SPCC will be visible to the supplier in their eVA account.



- 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



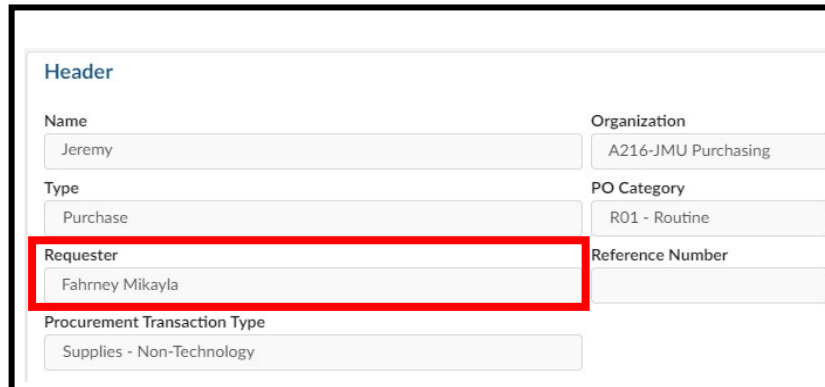
4. If you need to remove the SPCC from a requisition, click the X icon next to the selected Pcard Label, and then, click **Save**



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.

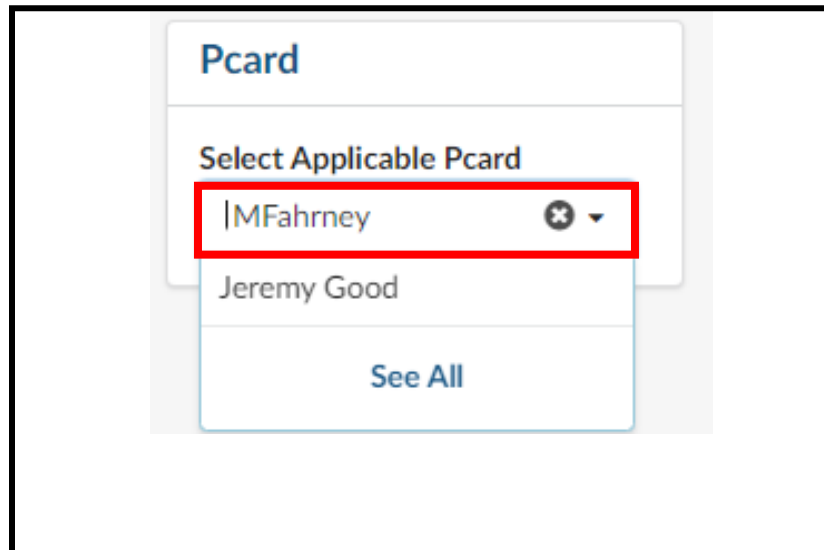


The screenshot shows a requisition header form with the following fields:

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

The 'Requester' field, containing 'Fahrney Mikayla', is highlighted with a red rectangle.

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' section with a dropdown menu titled 'Select Applicable Pcard'. The dropdown is open, showing the following options:

- MFahrney** (highlighted with a red rectangle)
- Jeremy Good

Below the dropdown is a 'See All' button.

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
i Validated successfully

Header

Name
Jeremy

Type
Purchase

<< Back to Catalog

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

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

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

eVA

Suppliers Contracts Shop Procurement Logi

Browse Suppliers

Create

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

Browse Suppliers

Keywords: Alerts: Commodity: ☐ My Commodities ☐ Favorite Suppliers ☒ Tier 1 Supplier Only

Filters: Tier 1 Supplier Only: ☒ Level: Supplier Group ☐ Supplier Head-office ☐ Supplier Site ☐

0 Selected

	Code	Supplier	Web site	Status	Qualification	Document Status	Network	Risk Level	Performance
<input type="checkbox"/>	SUP000384	- Dash Dash	www.website.com	Active Supplier					
<input type="checkbox"/>	SUP000401	Dove Medical Supply, LLC	https://www.dovemedicalsupply.com/	Active Supplier					

- 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 eMail/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.

Keywords Alerts: Commodity: ☐ My Commodities ☐ Favorite Suppliers ☒ Tier 1 Supplier Only

Filters: Keywords: dove medical ☐ Tier 1 Supplier Only: ☒ Level: Supplier Group ☐ Supplier Head-office ☐ Supplier Site ☐

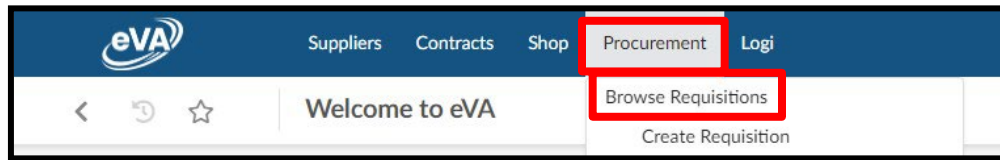
0 Selected

	Code	Supplier	Web site	Status	Qualification	Document Status	Network	Risk Level	Performance Scorecard	Reviews	SWaM Categories
<input type="checkbox"/>	SUP000401	Dove Medical Supply, LLC	https://www.dovemedicalsupply.com/	Active Supplier						★★★★★	<ul style="list-style-type: none"> Small Business Women Owned Business

1 Result(s)

Requisitions

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



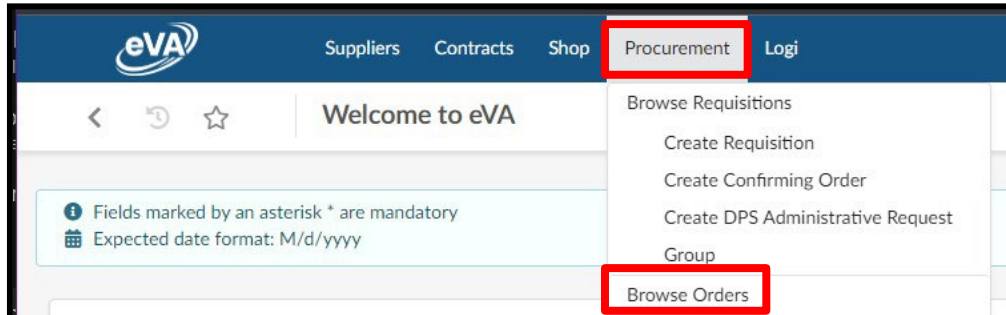
2. From the **Browse Requisitions** page, you can enter several options into the Keywords field. For example, you can enter the REQ# or the partial requisition name (formerly requisition title), then click **Search**.

- 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**

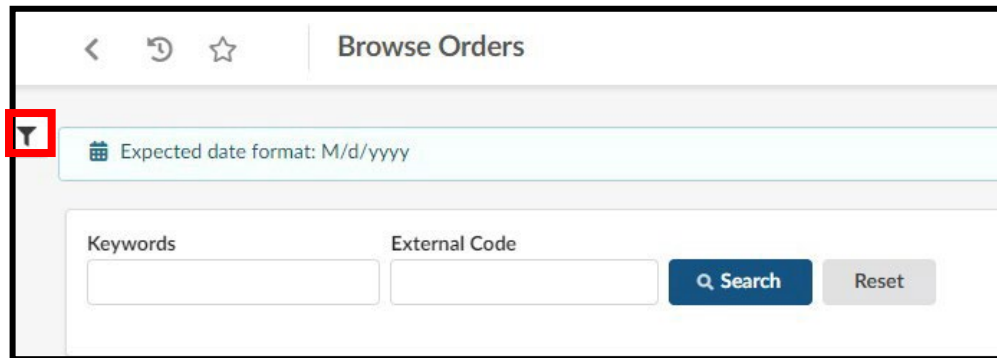
Orders

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.

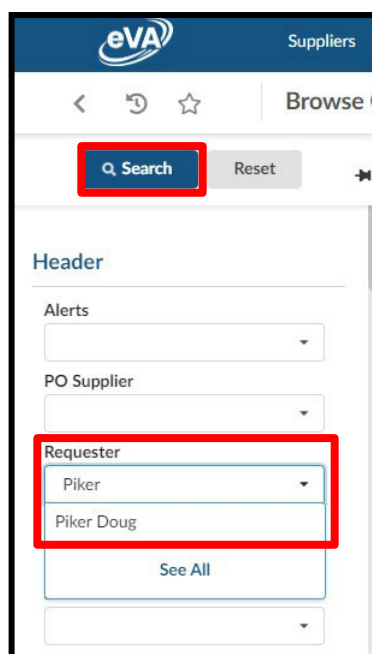
1. Click **Procurement** and then in the dropdown menu, click **Browse Orders**



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

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

3. 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)

4. 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.

Fields marked by an asterisk * are mandatory

Title

Documentation*
General description of the document(s), such as Quote for order

Summary

Information

Status*
Approved

Document ⓘ
English

Click or Drag to add files

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

Status*
Approved

Document ⓘ
English

Click or Drag to add files

EN - BH Quote 1081174704.pdf

EN - Example Attachment.docx

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

Fields marked by an asterisk * are mandatory

Title

Documentation*
General description of the document(s), such as Quote for order

Summary

Information

Status*
Approved

Document ⓘ
English

Click or Drag to add files

EN - BH Quote 1081174704.pdf

EN - Example Attachment.docx

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

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

Buttons: Save, Submit for Approval, << Back to Catalog, Reset Allocations

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

#	Product Type	Order Item Reference	Item Description	Supplier
7018-1	Product		Example Line Item	(Dove Medical Supply, LLC) Dove

1 Result(s)

> Allocations

> Approvals

> Attachments

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.

Attachments

Keywords: [Search] [Reset]

Download Zip | 0 Selected | + New Document

Documentation	Type	Att.
General description of the document(s), such as Quote for order	Supplier Document (Approved)	[Icon] [Icon]
General description of the document(s), such as for Procurement review	Internal Attachment (Approved)	[Icon] [Icon]

2 Result(s)

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' (highlighted with a red box), and 'Close'. Below these is the 'Supplier Contact' section with a dropdown menu showing 'SPECIALIST eProcurement' and a location field showing 'Hamdenburg, Virginia 22007 UNITED STATES'. The 'Internal Additional Details' section is expanded, showing the 'Product' section. Within the 'Product' section, the 'External Contract Number' field is highlighted with a red box. The field contains the placeholder text 'Place contract number here - if applicable'. Other fields visible include 'Item Cross Reference', 'Contract', 'Supplier Item', and 'Resale Flag'.

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 summary bar with a right arrow, the number '1', the word 'Selected', a '+ Add line' button, and a 'Copy Selected Lines' button (highlighted with a red box). Below this is a table with columns: '#', 'Product Type', 'Order Item Reference', and 'Item Description'. The first row 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, it says '1 Result(s)'.

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

The screenshot shows a table titled "Items & Services" with the following columns: #, Product Type, Order Item Reference, and Item Description. There are two rows of data, both with "Product" as the Product Type and "Ad-Hoc Vendor Example Description" as the Item Description. The second row has the ID "1888-3". A red box highlights the pencil icon in the first column of the second row.

- 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 with two tabs: "Item Description" and "Estimate Costs". The "Item Description" tab is active and contains the following fields:

- Product Type***: Shipping
- Order Item Tag**: (empty)
- Short Description***: Shipping Fee
- Detailed Description**: (extra informaion about the shipping fee - if needed)
- Order Qty***: 1.00 Ea.
- Commodity***: 96286 - Transportation of Goods and Other Freight Services
- Delivery Date**: (empty)

The "Estimate Costs" tab is also visible and contains the following fields:

- Unit Price**: 15.00
- Currency**: USD

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