



# New eVA Transition Guide

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**Version 3.0**

**Updated July 3, 2023**

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## **JMU Procurement Services**

**Need eVA Help?  
Contact Us!**

**(540) 568-3145  
AskeVA@jmu.edu**



**Procurement  
Services**



## Table of Contents

### Table of Contents

New eVA Overview .....	4
Changes as a Result of the New Platform.....	4
<b><i>SPCC converted from previous eVA.....</i></b>	<b>4</b>
<b><i>SPCC no longer defaulted to "Use Pcard" .....</i></b>	<b>4</b>
<b><i>SPCC no longer can be edited.....</i></b>	<b>4</b>
<b><i>"Copy" now called "Duplicate".....</i></b>	<b>4</b>
<b><i>Prefixes on purchase orders and requisitions.....</i></b>	<b>5</b>
<b><i>Options to change or cancel a purchase order moved.....</i></b>	<b>5</b>
<b><i>Options to withdraw a purchase order.....</i></b>	<b>5</b>
<b><i>Change order numbering.....</i></b>	<b>6</b>
Converted Orders .....	6
Requisition .....	6
Purchase Order (PO or PCO).....	6
<b><i>Requisition comments – supplier section vs internal section.....</i></b>	<b>7</b>
<b><i>Requisition attachments – supplier visible upload vs internal only upload.....</i></b>	<b>7</b>
<b><i>PO print suppliers – reminder approval removed .....</i></b>	<b>7</b>
<b><i>Blocking error messages .....</i></b>	<b>7</b>
Challenges & Known Issues of the New Platform.....	7
<b><i>Vendors may not get your orders electronically.....</i></b>	<b>7</b>
<b><i>Non-catalog requisitions and purchase orders display a warning icon.....</i></b>	<b>7</b>
Signing into eVA.....	9
Creating a Punchout Catalog Order .....	11
Creating a Non-Catalog Order.....	20
Creating a Confirming Order .....	30
Creating an Order to an Un-Registered Supplier (formerly Ad-Hoc Order).....	41
Creating a PCO (PCard Order) .....	51
Approvals .....	54
Adding an Ad Hoc Approver .....	55
Checking your Orders Approval Flow.....	58
Cancelling an Order in eVA.....	59
Creating a change order in eVA.....	60
Managing your SPCC in eVA .....	61
<b><i>How to load your SPCC to eVA .....</i></b>	<b>61</b>
<b><i>How to update and remove your SPCC.....</i></b>	<b>63</b>
<b><i>How to associate others with your SPCC (ad hoc approver process).....</i></b>	<b>64</b>
<b><i>How to add or remove a SPCC onto a requisition .....</i></b>	<b>67</b>
<b><i>How to Order on Behalf of Another User .....</i></b>	<b>69</b>
Searching for Suppliers, Orders, & Requisitions.....	70

<i>Suppliers outside of a requisition</i> .....	70
Requisitions.....	73
Orders .....	74
Adding Attachments to a Requisition .....	75
Adding a Contract Number to a Line Item .....	79
Breaking Out Shipping Charges .....	79

## 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 1<sup>st</sup> 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 1<sup>st</sup> 2022, then it converted and is ready for use in New eVA.

### SPCC no longer defaulted to "Use Pcard"

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

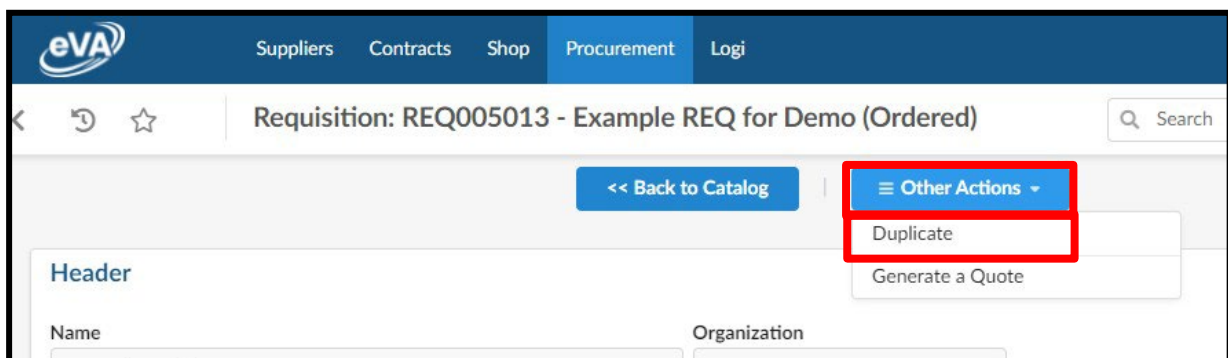
### SPCC no longer can be edited

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

### "Copy" now called "Duplicate"

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

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



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



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

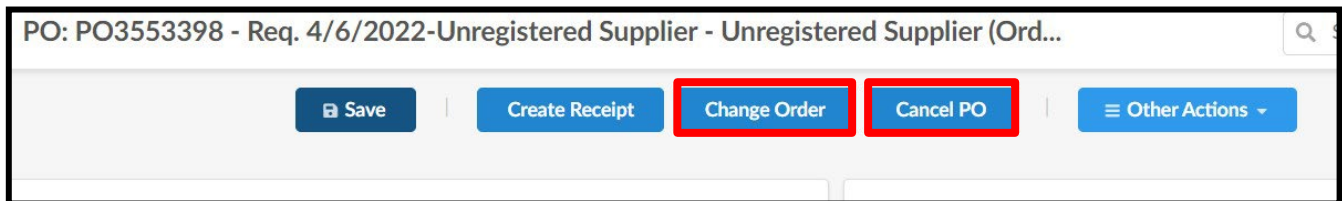
## Prefixes on purchase orders and requisitions

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

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

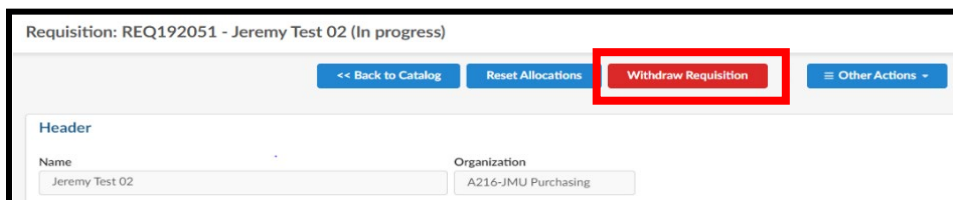
## Options to change or cancel a purchase order moved

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



## Options to withdraw a purchase order

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



## Change order numbering

### Converted Orders

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

### Header

<p><b>Name*</b></p> <input type="text" value="PO111111 Change Order - (Original Title)"/>	<p><b>Organization*</b></p> <input type="text" value="A216-JMU Purchasing"/>
<p><b>Type*</b></p> <input type="text" value="Purchase"/>	<p><b>PO Category*</b></p> <input type="text" value="R01.- Routine"/>
<p><b>Requester*</b></p> <input type="text" value="Good Jeremy"/>	<p><b>Reference Number</b></p> <input style="border: 2px solid red;" type="text" value="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)

Search 🛒

[← Back to Catalog](#) | [Other Actions](#)

### Change Order

Significant Change Request?  No  Yes

Amend#

Change Type(s)  Description of Changes

Header

<p><b>Name</b></p> <input type="text" value="Amendment request 3/11/2022 PO002984"/>	<p><b>Organization</b></p> <input type="text" value="A216-VP Academic Affairs"/>
<p><b>Type</b></p> <input type="text"/>	<p><b>PO Category</b></p> <input type="text"/>

**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

<p><b>Name</b></p> <input type="text" value="Copy of Example REQ for Demo- Dove Medical Supply, ..."/>	<p><b>Organization</b></p> <input type="text" value="A216-VP Academic Affairs"/>
<p><b>Buyer Contact</b></p> <input type="text" value="Piker Doug"/>	<p><b>Order Date</b></p> <input type="text" value="3/11/2022"/>
<p><b>Initial P.R.</b></p> <input type="text" value="REQ005015-Copy of Example REQ for Demo"/>	<p><input type="checkbox"/> Internal Order</p>

**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**

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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

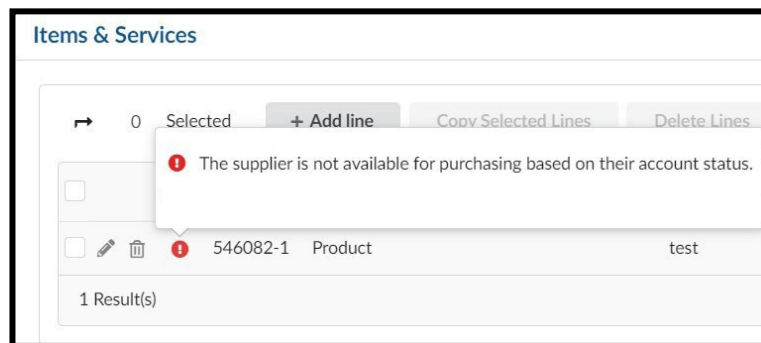
The New eVA platform no longer allows you to select a checkbox for an attachment to be visible to supplier or internal only. Rather when adding the attachment(s) you will need to select if it is an **Internal Attachment** or a **Supplier Document**, after that selection has been made you can't switch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

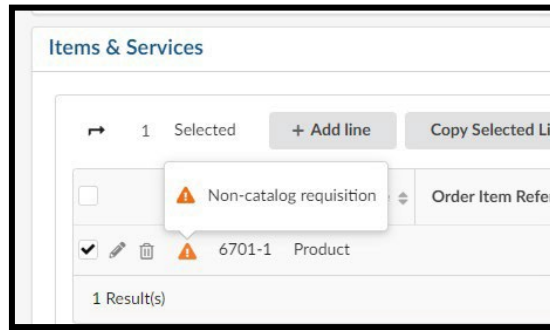
### Vendors may not get your orders electronically

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.

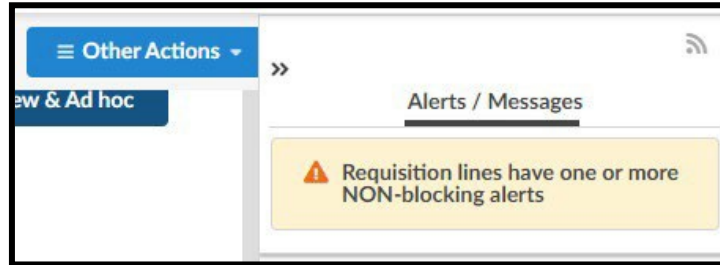
### Non-catalog requisitions and purchase orders display a warning icon

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*



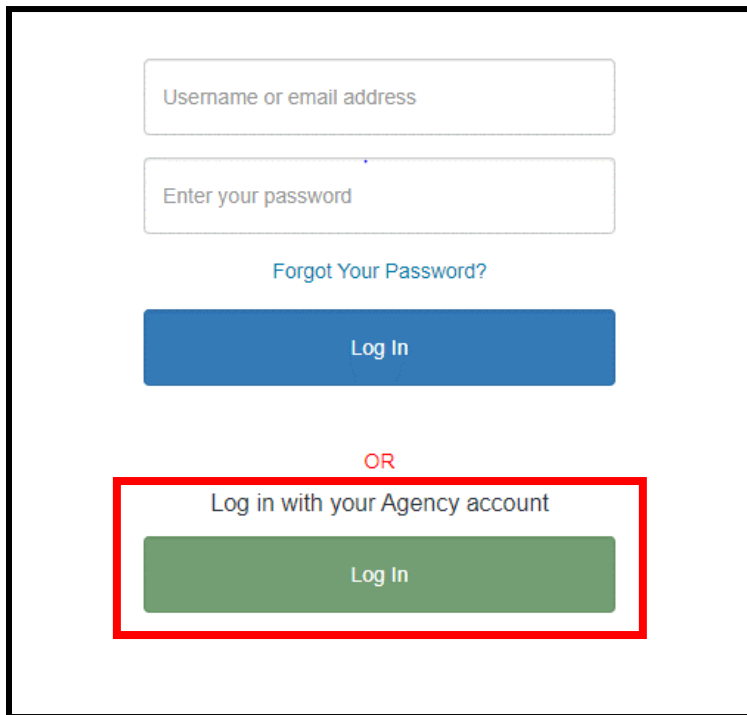
*On the top right*





## Signing into eVA

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



Username or email address

Enter your password

[Forgot Your Password?](#)

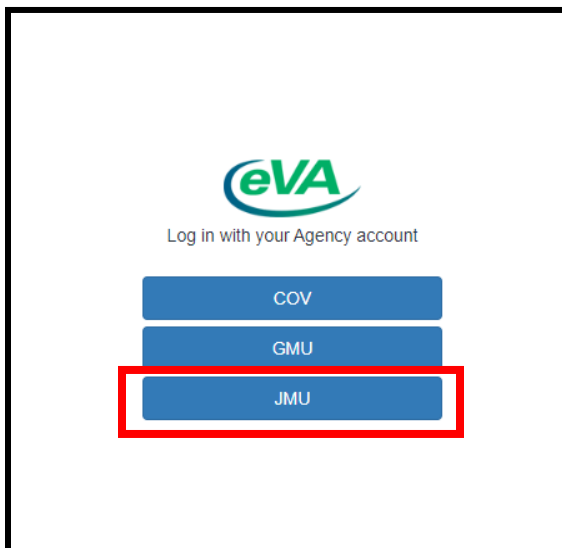
Log In

OR

Log in with your Agency account

Log In

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



**eVA**

Log in with your Agency account

COV

GMU

JMU

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](mailto:helpdesk@jmu.edu)

JMU eID  
goodjp

Password  
\*\*\*\*\*

Log in

**Protect Your Privacy!**

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

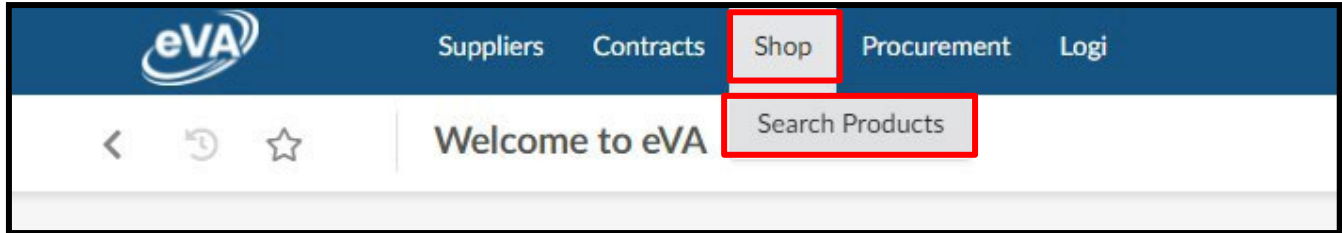
- Windows users: Close all web browser windows.
- Mac users: Quit your web browser

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

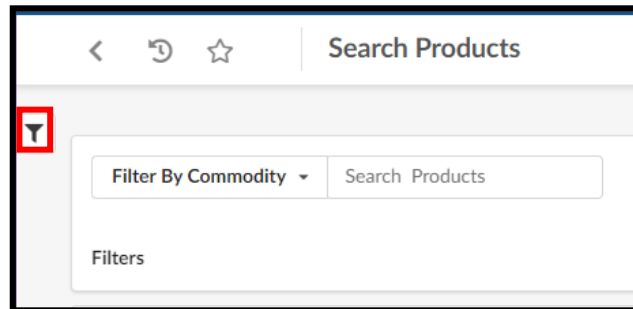
## Creating a Punchout Catalog Order

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

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



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



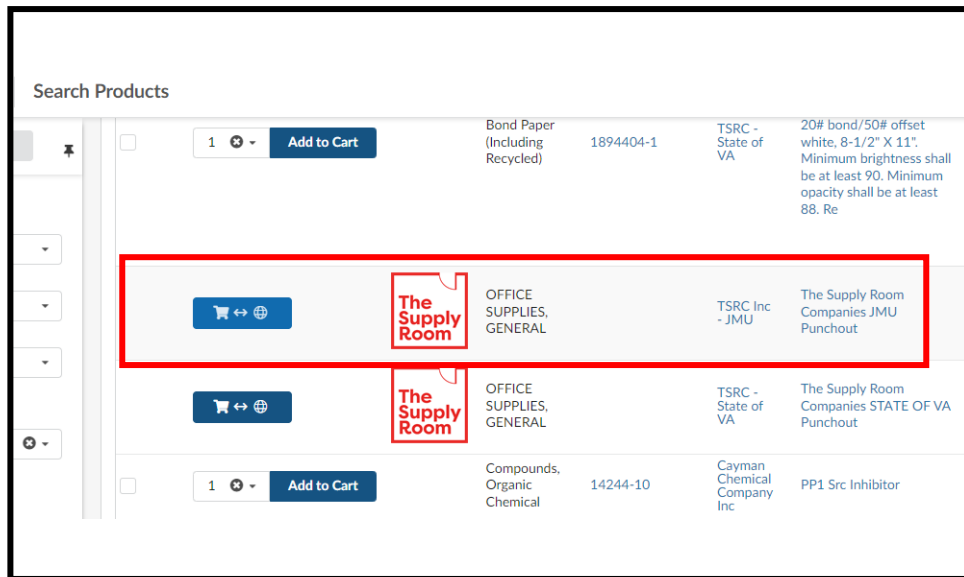
3. The Filter menu will expand out, click the checkbox next to **Punchout Only**, and then click **Search**

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

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

A screenshot of a search results page. At the top, there is a 'Filter By Commodity' dropdown and a 'Search Products' input field. The 'Search Products' field is highlighted with a red box. To the right of the input field are a blue 'Search' button and a grey 'Reset' button. Below the search bar, there is a filter indicator: 'Filters Punchout Only: ✓ x'. The main content area shows a table of search results. The table has columns for 'Order', 'Image', 'Commodity', 'Product Code', and 'Supplier'. The first row shows 'ABRASIVES' from 'Department of General Services'. The second row shows 'Abrasives, Sandblasting (Other than Metal)' from 'Colonial Scientific Inc' with an image of a person sandblasting.

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



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

The screenshot shows the 'Header' form with the following fields highlighted in a red box:

Name*	Req. 10/18/2022	Organization*	A216-JMU Purchasing
Type*	Purchase	PO Category*	R01 - Routine
Requester*	Good Jeremy	Reference Number	
Procurement Transaction Type*	Supplies - Non-Technology		

Below the highlighted fields are 'Header Field 1', 'Header Field 2', 'Status' (Draft), and a 'Workflow Preview & Ad hoc' button.

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

**Header**

<p><b>Name*</b></p> <input style="width: 90%;" type="text" value="TSRC - Example Punchout Order"/>	<p><b>Organization*</b></p> <input style="width: 90%;" type="text" value="A216-VP Student Affairs"/>
<p><b>Type*</b></p> <input style="width: 90%;" type="text" value="Purchase"/>	<p><b>PO Category*</b></p> <input style="width: 90%;" type="text"/>
<p><b>Requester*</b></p> <input style="width: 90%;" type="text" value="Stubbs Dean"/>	<p><b>Reference Number</b></p> <input style="width: 90%;" type="text"/>

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

**Header**

<p><b>Name*</b></p> <input style="width: 90%;" type="text" value="TSRC - Example Punchout Order"/>	<p><b>Organization*</b></p> <input style="width: 90%;" type="text" value="A216-VP Student Affairs"/>
<p><b>Type*</b></p> <input style="width: 90%;" type="text" value="Purchase"/>	<p><b>PO Category*</b></p> <input style="width: 90%;" type="text"/>
<p><b>Requester*</b></p> <input style="width: 90%;" type="text" value="Stubbs Dean"/>	<p><b>Reference Number</b></p> <input style="width: 90%;" type="text"/>

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

**Header**

<p><b>Name*</b></p> <input style="width: 90%;" type="text" value="TSRC - Example Punchout Order"/>	<p><b>Organization*</b></p> <input style="width: 90%;" type="text" value="A216-VP Student Affairs"/>
<p><b>Type*</b></p> <input style="width: 90%;" type="text" value="Purchase"/>	<p><b>PO Category*</b></p> <input style="width: 90%;" type="text"/>
<p><b>Requester*</b></p> <input style="width: 90%;" type="text" value="Stubbs Dean"/>	<p><b>Reference Number</b></p> <input style="width: 90%;" type="text"/>

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

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

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

*PO Category Refresher:*

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

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

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

- Name\***: TSRC - Example Punchout Order
- Organization\***: A216-VP Student Affairs
- Type\***: Purchase
- PO Category\***: R01 - Routine
- Requester\***: Stubbs Dean
- Reference Number**: (empty)
- PO for eVA Billing Reference ⓘ**: (empty)
- Procurement Transaction Type\***: (dropdown menu open, showing options: Supplies - Non-Technology, Printing, Professional Services, Real Property, Supplies - Technology, Surplus)

A blue button labeled "Workflow Preview & Ad hoc" is located at the bottom right of the form.

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

The screenshot shows the 'Create Requisition' form with the following elements:

- Navigation icons: back, refresh, star
- Page title: Create Requisition
- Search bar: Search
- Save** button (highlighted with a red box)
- Message: Fields marked by an asterisk \* are mandatory
- Section: Header
- Comment field: Comment ⓘ



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

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

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

4 Result(s)

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

The screenshot shows the 'Items & Services' interface with the 'Set Allocations' button highlighted in red. The table now shows all four items selected, with checkmarks in the first column. The 'Set Allocations' button is located at the top right of the interface.

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

4 Result(s)

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

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

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

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

19. You will now complete the other required allocation fields.

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

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

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

Set Allocations

Apply & Close Close

Allocations

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

- If the requisition is not within your expenditure authority, your approver will need to approve it.
- In some situations, based on the items purchased or the dollar amount, the requisition may require approval from Procurement Services.

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

Save Submit for Approval

Fields marked by an asterisk \* are mandatory

Header

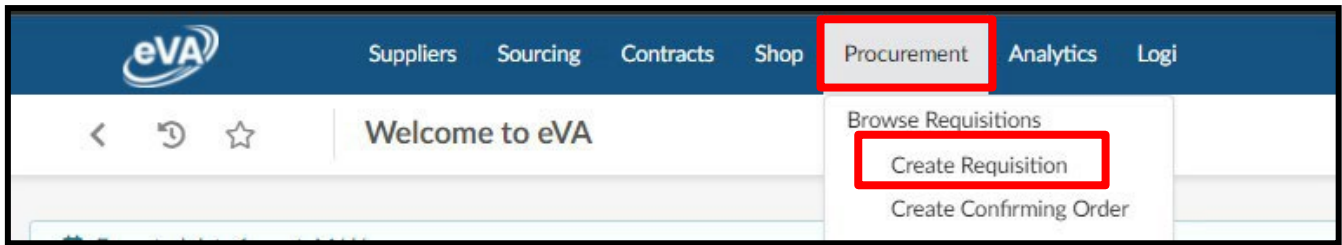
Name\* Organization\*

TSRC Punchout Order A216-JMU Pur

## Creating a Non-Catalog Order

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

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



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

 A screenshot of the 'Header' section of a requisition form. The 'Name' field is highlighted with a red box and contains the text 'Non-Catalog Order'. Other fields include 'Organization' (A216-Athletics), 'Type' (Purchase), and 'PO Category'.

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

 A screenshot of the 'Header' section of a requisition form, similar to the previous one. The 'Organization' dropdown menu is highlighted with a red box and shows 'A216-Athletics' as the selected option. The 'Name' field contains 'Non-Catalog Order', 'Type' is 'Purchase', and 'PO Category' is empty.

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

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

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

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

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

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

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

*PO Category Refresher:*

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

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

The screenshot shows the 'Header' section of a requisition form. The fields are as follows:

- Name\***: Non-Catalog Order
- Organization\***: A216-Athletics
- Type\***: Purchase
- PO Category\***: R01 - Routine
- Requester\***: Stubbs Dean
- Reference Number**: (empty)
- Procurement Transaction Type\***: (dropdown menu open, showing options: Non-Procurement or Other, Non-professional Services - Non-Technology, Non-professional Services - Technology, PPEA/PPTA, Printing, Professional Services, Real Property, Supplies - Non-Technology, Supplies - Technology)
- PO for eVA Billing Reference ⓘ**: (dropdown menu)

A blue button labeled "Workflow Preview & Ad hoc" is visible on the right side of the form.

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' page. The 'Save' button is highlighted with a red border. Below the button, a message states: "Fields marked by an asterisk \* are mandatory". The 'Header' section of the form is visible below the message.

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

Ship to: JMU - Procurement Services, 752 Ott Street, Harrisonburg

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

Comment

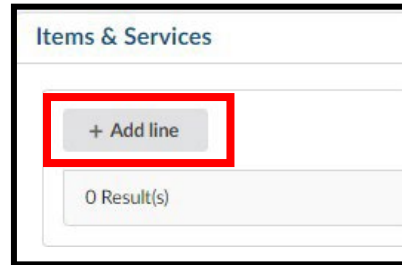
Create Blanket Purchase Order

Bypass Integration?

**Items & Services**

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

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



10. The Item Details pop-up window will display

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

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

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



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

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

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

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

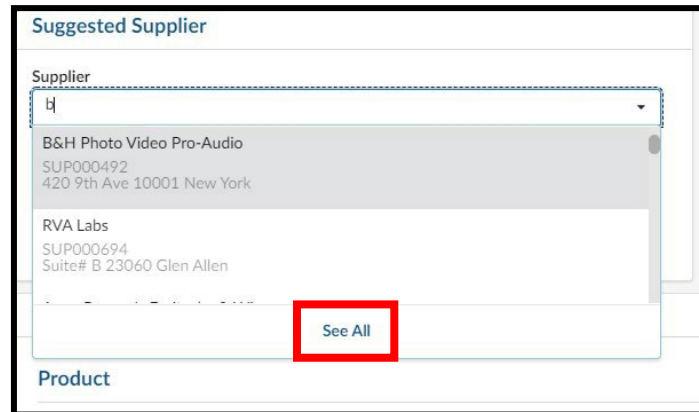
15. In the **Commodity** field, click in the field and begin typing the commodity name. The system will begin to populate available results that match. Once you find the best fitting commodity, click on the result in the listing to select it.

The screenshot shows the 'Order Qty' field with the number '1' and the 'Commodity' field containing the text '20676 - Printers, 3D'. The 'Commodity' field is highlighted with a red border.

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

The screenshot shows two sections: 'Item Description' and 'Estimate Costs'. The 'Unit Price' field in the 'Estimate Costs' section contains the value '5529' and is highlighted with a red border.

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

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

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

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

Item Details

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

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

Items & Services

0 Selected                   

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

1 Result(s)

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

Items & Services

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

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

1 Result(s)

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

Set Allocations

Apply & Close Close

Allocations

Chart of Account  
James Madison University

+ Allocation Template List

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

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

Allocations

Chart of Account  
James Madison University

+ Allocation Template List

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

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

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

Allocations

Chart of Account  
James Madison University

+ Allocation Template List

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

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

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

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

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

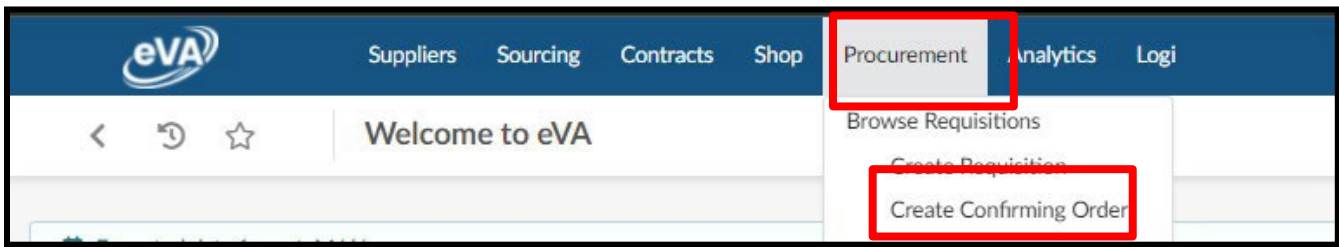
28. You can now submit the requisition. At the top of the page, click **Submit for Approval**
- If the requisition is not within your expenditure authority, your approver will need to approve it.
  - In some situations, based on the items purchased or the dollar amount, the requisition may require approval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

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

## Creating a Confirming Order

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

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



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

**Header**

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

[Workflow Preview & Ad hoc](#)

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

**Header**

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

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 several fields: Name (Confirms Order Example), Organization (A216-VP Academic Affairs), Type (Confirms Order), Requester (Piker Doug), Procurement Transaction Type, Status (Draft), and checkboxes for 'Open Requisition' and 'Bypass Integration?'. The 'PO Category' dropdown menu is open, showing a list of 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, and X02 - Exempt from Fees. A red box highlights the dropdown arrow and the list of options.

*PO Category Refresher:*

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

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

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

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

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



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*)

The screenshot displays a web form for creating a requisition. At the top, there are navigation buttons: "Save", "<< Back to Catalog", "Create Solicitation", and "Other Actions". A notification bar states "Fields marked by an asterisk \* are mandatory".

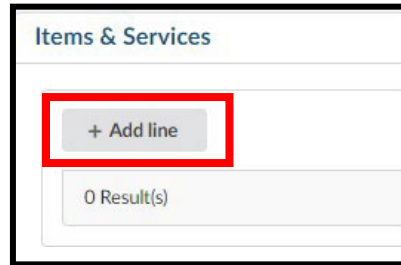
The form is divided into several sections:

- Header:** Contains fields for 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, and Status (Draft). A "Workflow Preview & Ad hoc" button is also present.
- Ship to:** Displays the shipping address: JMU - Procurement Services, 752 Ott Street, Harrisonburg, VA 22807.
- Bill To:** Displays the billing address: JMU - Accounts Payable, MSC 5712 1031 South Main Street, Mass Hall, Harrisonburg, VA 22807.
- Comment:** A text area for adding comments, currently empty.
- Items & Services:** A section at the bottom, highlighted with a red box, containing a "+ Add line" button.

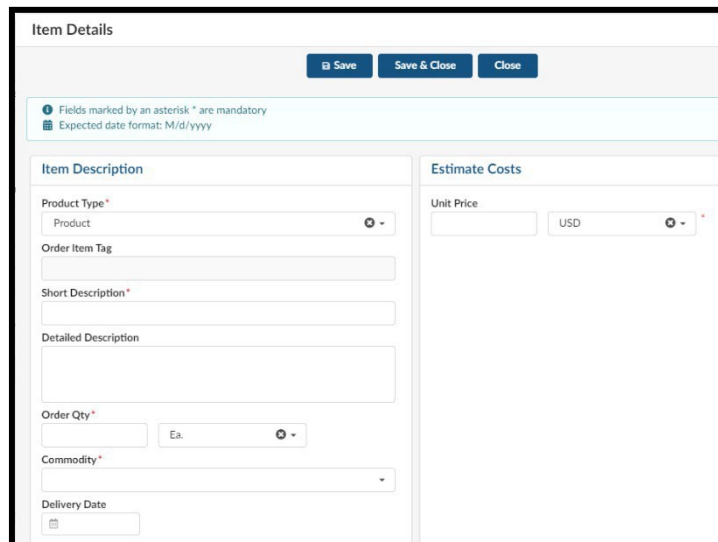
At the bottom of the page, there are checkboxes for "Create Blanket Purchase Order" and "Bypass Integration?".

**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**.

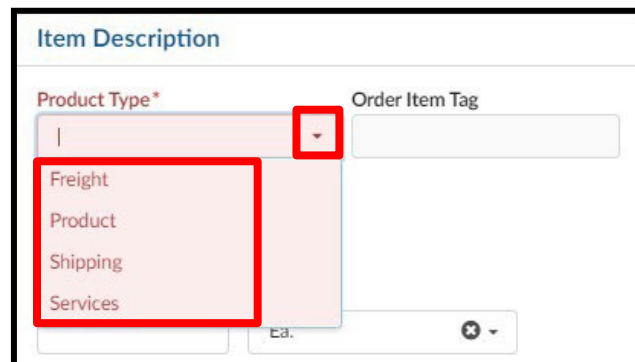
8. Under Items & Services, click **+Add line**



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 are two informational icons: a blue circle with an 'i' for "Fields marked by an asterisk \* are mandatory" and a blue square with a calendar icon for "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 contains fields for "Product Type\*" (with a dropdown menu showing "Product"), "Order Item Tag", "Short Description\*", "Detailed Description", "Order Qty\*" (with a unit dropdown showing "Ea."), "Commodity\*", and "Delivery Date". The "Estimate Costs" section contains a "Unit Price" field and a "USD" dropdown menu.

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

A close-up screenshot of the "Item Description" section. The "Product Type\*" dropdown menu is open, showing a list of options: "Freight", "Product", "Shipping", and "Services". A red box highlights the dropdown arrow and the list of options. The "Order Item Tag" field is visible to the right.

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

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

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

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

- Product Type\***: Services
- Order Item Tag**: (empty)
- Item Type**: (empty)
- Short Description**: (empty)
- Detailed Description\***: Confirming order for website order placed on 12/34/56
- Order Qty\***: 10
- Unit**: Ea.
- Commodity\***: 20676 - Printers, 3D (highlighted with a red box)

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

The screenshot shows the 'Item Description' form on the left and the 'Estimate Costs' form on the right. The 'Unit Price' field in the 'Estimate Costs' form is highlighted with a red box.

**Item Description**

- Product Type\***: Services
- Order Item Tag**: (empty)
- Item Type**: (empty)
- Short Description**: (empty)
- Detailed Description\***: Confirming order for website order placed on 12/34/56
- Order Qty\***: 10
- Unit**: Ea.
- Commodity\***: 20676 - Printers, 3D
- Delivery Date**: (empty)
- From**: (empty)
- End**: (empty)

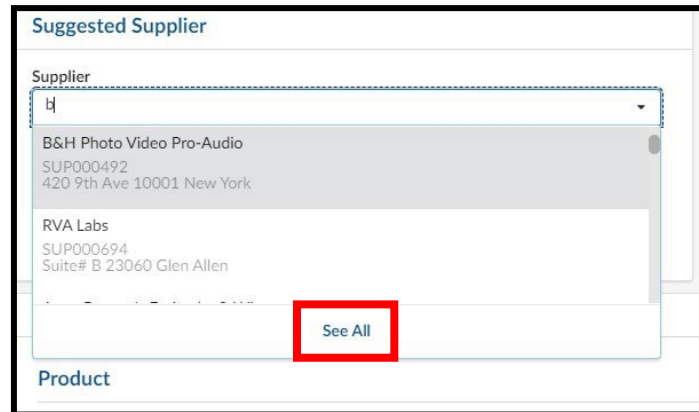
**Estimate Costs**

- Unit Price**: 1500 (highlighted with a red box)
- Unit**: USD

**Deliver To**

- Deliver To**: (empty)

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



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

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

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

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

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

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

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

Item Details

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

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

Items & Services

0 Selected                   

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

1 Result(s)

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

The screenshot shows the 'Items & Services' interface. At the top, there are several action 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: '# 6701-1', 'Product', 'Confirming order for order already placed', and '( B&H Photo Video Pro-Audio )'. At the bottom left, it says '1 Result(s)'.

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

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

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

The screenshot shows the 'Allocations' window. The 'Chart of Account' is 'James Madison University'. Below that, there is a '+ Allocation' button and a 'Template List' dropdown menu. Below this 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: '%', '%', a dropdown menu, a dropdown menu, a dropdown menu, and 'A216-Athletics ⓘ\*'. The row is highlighted in grey.

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. The 'Chart of Account' is 'James Madison University'. Below that, there is a '+ Allocation' button and a 'Template List' dropdown menu. Below this 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 %', a dropdown menu, a dropdown menu, a dropdown menu, and 'A216-Athletics ⓘ\*'. The '100 %' field is highlighted with a red rectangle.

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

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

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

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

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

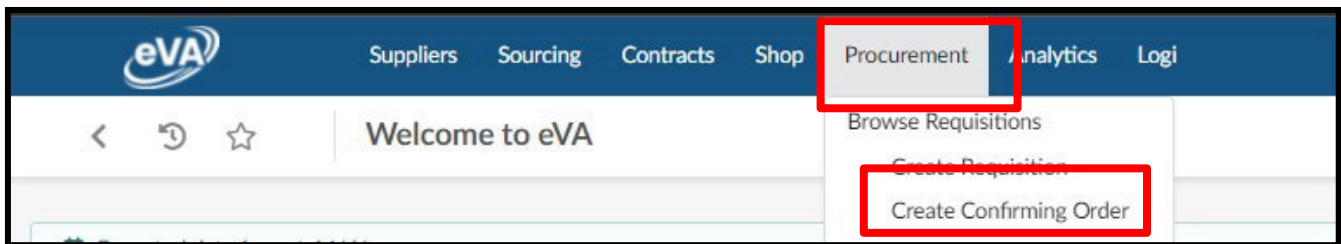
The screenshot shows the 'Requisition: REQ006701 - Confirming Order Example (Draft)' page. At the top, there are navigation buttons: 'Save', 'Submit for Approval', '<< Back to Catalog', 'Reset Allocations', and 'Other Actions'. The 'Submit for Approval' button is highlighted with a red box. Below the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



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

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

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



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

**Header**

<b>Name*</b> <input type="text" value="Ad-Hoc Vendor Example"/>	<b>Organization*</b> <input type="text" value="A216-Athletics"/>
<b>Type*</b> <input type="text" value="Purchase"/>	<b>PO Category*</b> <input type="text"/>
<b>Requester*</b> <input type="text" value="Stubbs Dean"/>	<b>Reference Number</b> <input type="text"/>

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

**Header**

<b>Name*</b> <input type="text" value="Ad-Hoc Vendor Example"/>	<b>Organization*</b> <input type="text" value="A216-Athletics"/>
<b>Type*</b>	<b>PO Category*</b>

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

The screenshot shows a form titled "Header" with several fields. The "PO Category" field is highlighted with a red box, and its dropdown menu is open, displaying a list of options. The options are:

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

*PO Category Refresher:*

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

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

**Header**

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

Type\* Confirming Order PO Category\* R01 - Routine

Requester\* Stubbs Dean Reference Number

Procurement Transaction Type\*

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

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

Create Requisition

Save

Fields marked by an asterisk \* are mandatory

Header

Comment

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

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

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

Fields marked by an asterisk \* are mandatory

**Header**

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

Type\* Confirming Order PO Category\* R01 - Routine

Requester\* Stubbs Dean Reference Number

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

Status In progress Workflow Preview & Ad hoc

Open Requisition

Bypass Integration?

**Items & Services**

0 Selected + Add line

**A**

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

**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**.

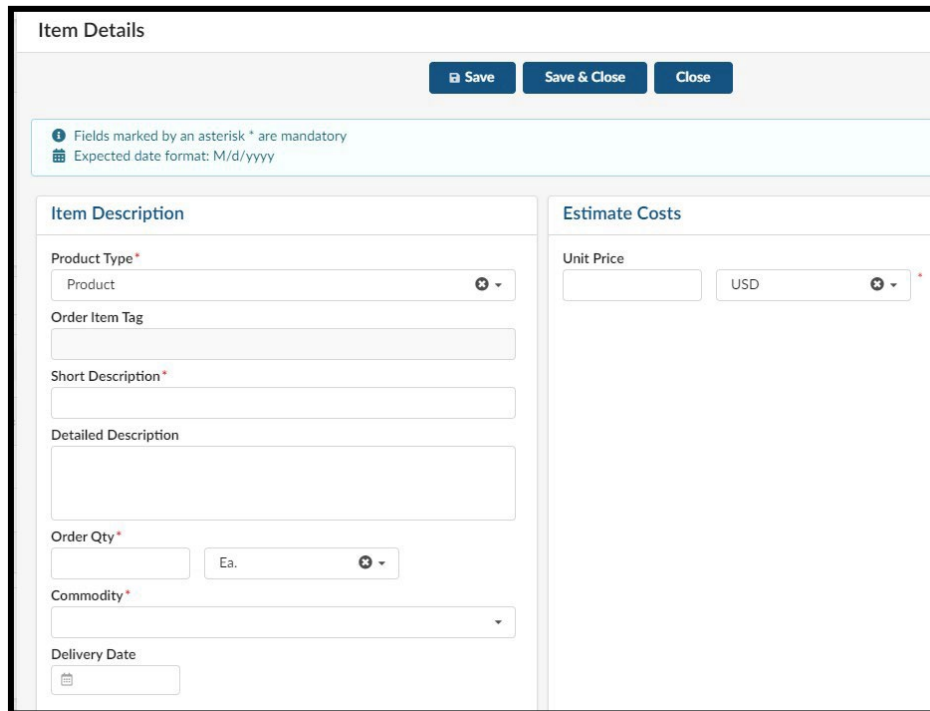
8. Under Items & Services, click **+Add line**

**Items & Services**

+ Add line

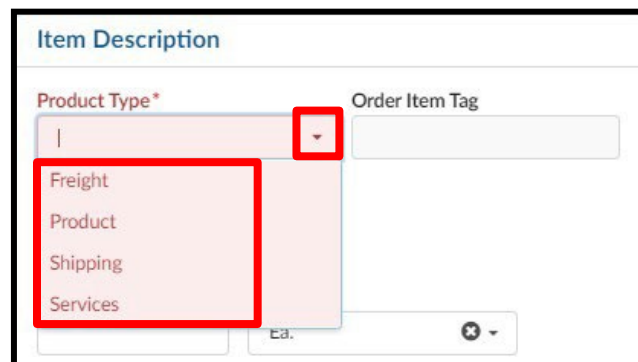
0 Result(s)

9. The Item Details pop-up window will display



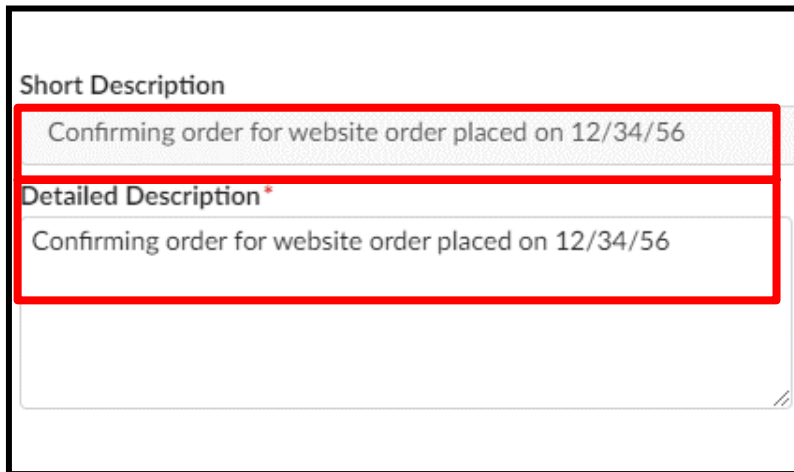
The screenshot shows the 'Item Details' pop-up window. At the top, there are three buttons: 'Save', 'Save & Close', and 'Close'. Below these buttons is a light blue banner with the text: 'Fields marked by an asterisk \* are mandatory' and 'Expected date format: M/d/yyyy'. The window is divided into two main sections: 'Item Description' on the left and 'Estimate Costs' on the right. The 'Item Description' section contains the following fields: 'Product Type\*' (a dropdown menu with 'Product' selected), 'Order Item Tag' (a text input field), 'Short Description\*' (a text input field), 'Detailed Description' (a larger text input area), 'Order Qty\*' (a text input field with 'Ea.' selected in a unit dropdown), 'Commodity\*' (a dropdown menu), and 'Delivery Date' (a date picker). The 'Estimate Costs' section contains a 'Unit Price' field and a currency dropdown menu with 'USD' selected.

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



This close-up screenshot shows the 'Product Type\*' dropdown menu. The dropdown arrow is highlighted with a red square. The dropdown list is open, showing four options: 'Freight', 'Product', 'Shipping', and 'Services'. The entire dropdown list is enclosed in a red rectangular box.

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



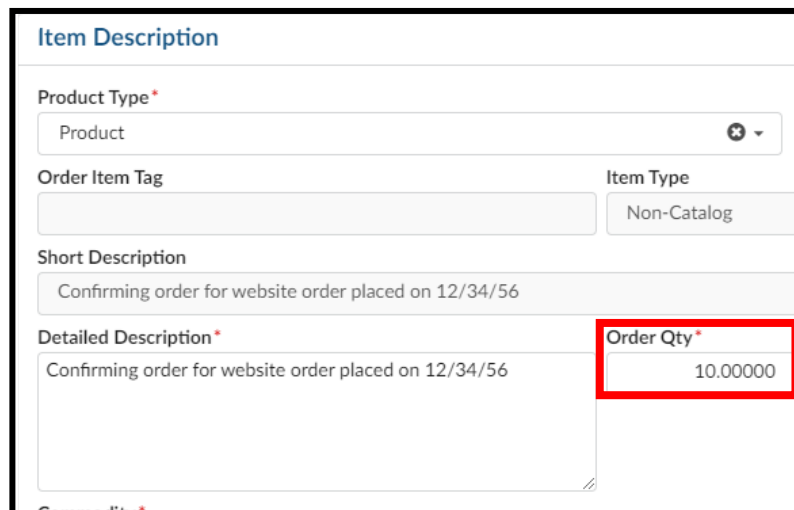
Short Description

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

Detailed Description \*

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

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



Item Description

Product Type \*

Product

Order Item Tag

Item Type

Non-Catalog

Short Description

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

Detailed Description \*

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

Order Qty \*

10.00000

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

### Item Description

---

**Product Type\***

**Order Item Tag**

**Short Description**

**Detailed Description\***

**Commodity\***

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

### Item Description

---

**Product Type\***

**Order Item Tag**

**Short Description**

**Detailed Description\***

**Item Type**

**Order Qty\***

### Estimate Costs

---

**Unit Price**



**Deliver To**

---

Deliver To

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

**Suggested Supplier**

Supplier

Fulfillment Supplier ⓘ

Unable to Register Supplier ⓘ

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

**Suggested Supplier**

Unable to Register Supplier ⓘ

**Unregistered Supplier Name\***

Ad-hoc Vendor Example Name

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

**Item Details**

Save Save & Close Close

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

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

**Items & Services**

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

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

1 Result(s)

A

B



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

The screenshot shows a table with the following 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 with a red box.

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

The 'Set Allocations' window displays the 'Chart of Account' as James Madison University. Below this, there is a '+ Allocation' button and a 'Template List' dropdown menu. The '+ Allocation' button is highlighted with a red box.

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

The screenshot shows the 'Set Allocations' window with a new row added to the table. The row contains a trash icon, a percentage field, a fiscal year dropdown, a department dropdown, an account dropdown, an 'Acc. Cross Reference' field, and an organization dropdown set to 'A216-Athletics'.

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

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

The screenshot shows the 'Set Allocations' window with the percentage field in the new row highlighted with a red box. The value '100' is entered in the percentage field.

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

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

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

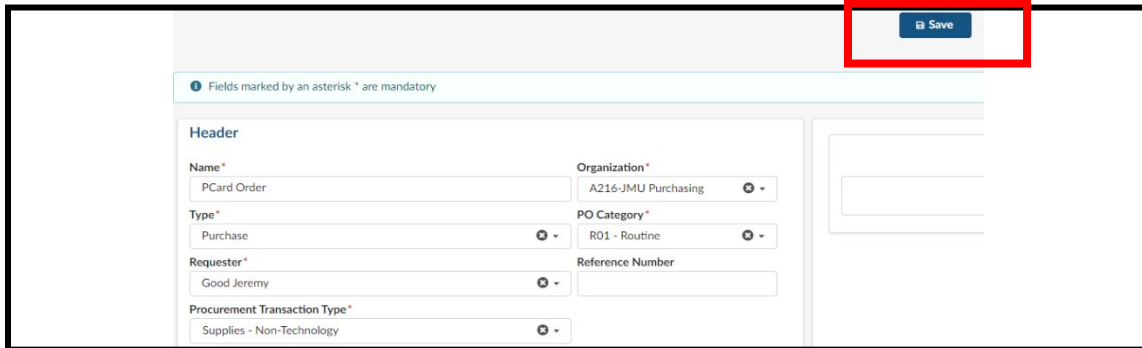
The screenshot shows the 'Set Allocations' window. At the top right, there are two buttons: 'Apply & Close' and 'Close'. The 'Apply & Close' button is highlighted with a red box.

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

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

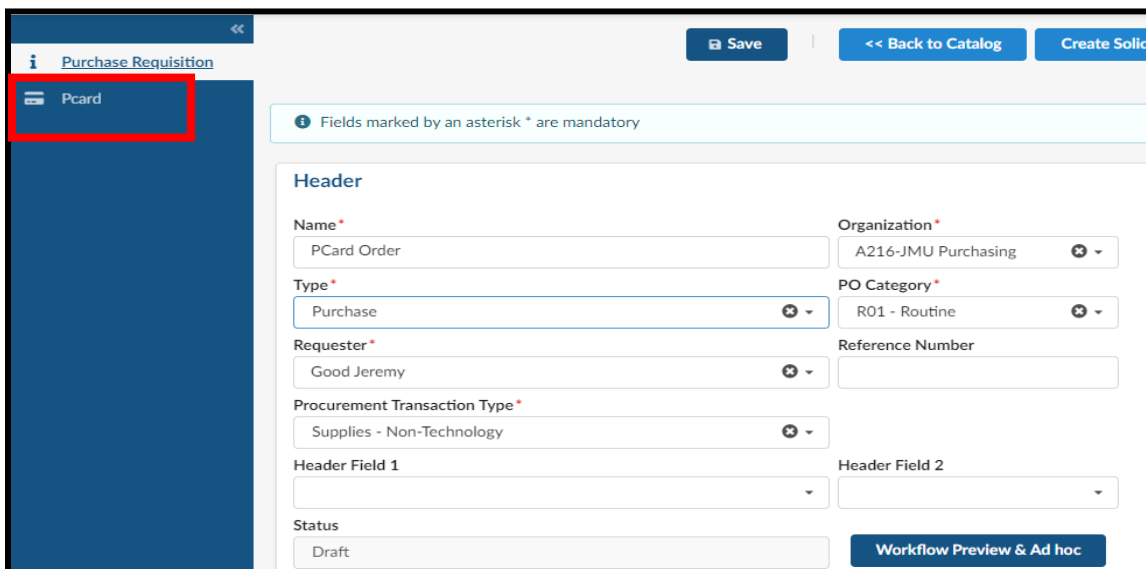
## Creating a PCO (PCard Order)

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



The screenshot shows a web form for creating a PCard Order. The form is titled "Header" and contains several fields: Name\* (PCard Order), Organization\* (A216-JMU Purchasing), Type\* (Purchase), PO Category\* (R01 - Routine), Requester\* (Good Jeremy), Reference Number, and Procurement Transaction Type\* (Supplies - Non-Technology). A "Save" button is located in the top right corner of the form, highlighted with a red rectangular box.

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



The screenshot shows the "Purchase Requisition" screen. The "Pcard" option is highlighted in a red rectangular box in the left sidebar. The main form area contains the same "Header" information as the previous screenshot, including Name\* (PCard Order), Organization\* (A216-JMU Purchasing), Type\* (Purchase), PO Category\* (R01 - Routine), Requester\* (Good Jeremy), Reference Number, and Procurement Transaction Type\* (Supplies - Non-Technology). The "Status" is set to "Draft". A "Workflow Preview & Ad hoc" button is visible at the bottom right of the form.

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

Pcard

Fields marked by an asterisk \* are mandatory

Pcard

Select Applicable Pcard

Jeremy Good

See All

- 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**

### Allocations

Chart of Account  
James Madison University

+ Allocation    Template List

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

5. Fill in Supplier Information and add an Allocation.

Requisition: REQ192381 - PCard Order (Draft)

Save    Submit for Approval    << Back to Catalog    Reset Allocations

Fields marked by an asterisk \* are mandatory

#### Header

**Name\*** PCard Order    **Organization\*** A216-JMU Purchasing

**Type\*** Purchase    **PO Category\*** R01 - Routine

**Requester\*** Good Jeremy    **Reference Number**

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

## Approvals

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

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

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

Save Close Save & Close Reject Approve

Fields marked by an asterisk \* are mandatory

**Header**

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

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

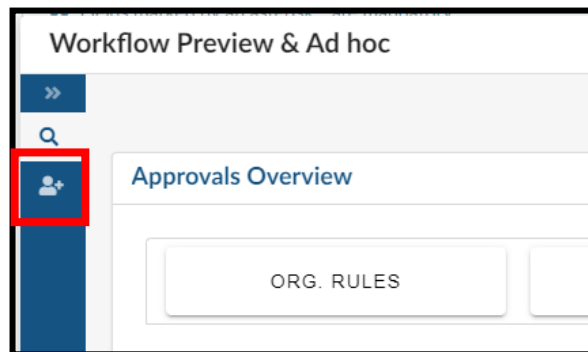
## Adding an Ad Hoc Approver

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

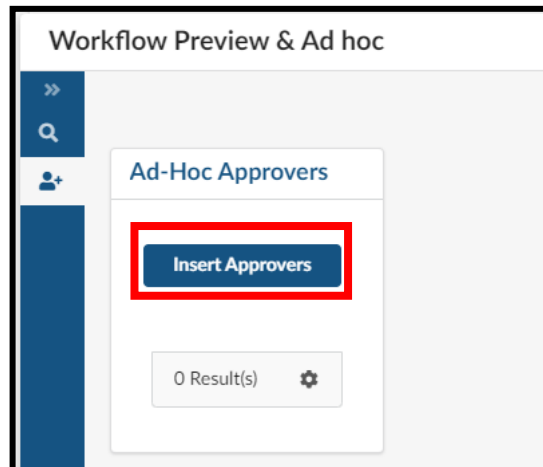
1. From the Requisition Header, click **Workflow Preview & Ad hoc**.
  - The Requisition Header must be completed and **Save** button clicked before starting this process. If not, the ad hoc approver will not save as expected.

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

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



3. Click **Insert Approvers**



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

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

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

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



6. Click **Save & Close**

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

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

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

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

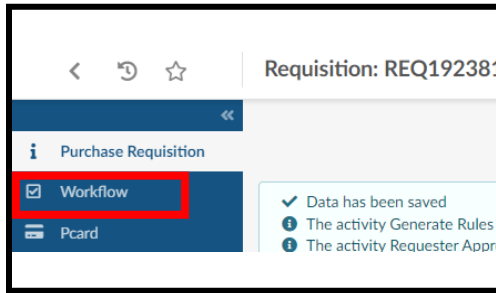
Order	Adhoc Approvers	Rules Description	Reason
1	Dickens Caroline	eva_adhoc	Adding Caroline for needed budget approval

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

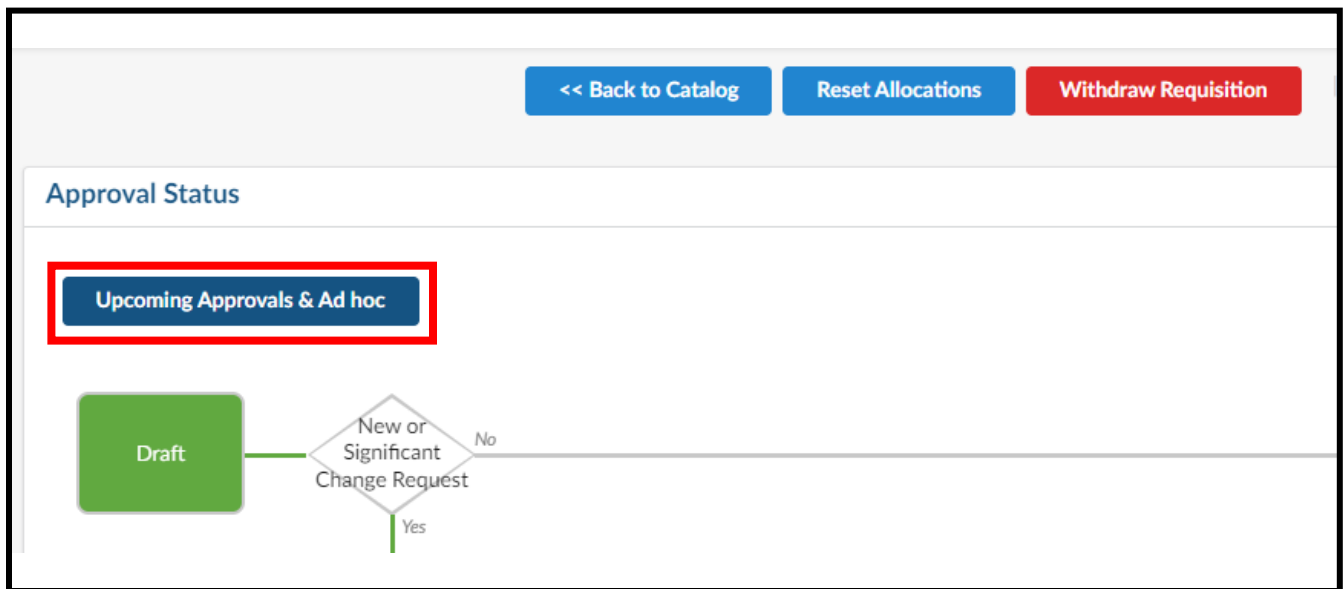
8. Once the requisition has been submitted, the selected ad hoc approver will be added into the approval flow and will be notified to approve when it is their turn.

## Checking your Orders Approval Flow

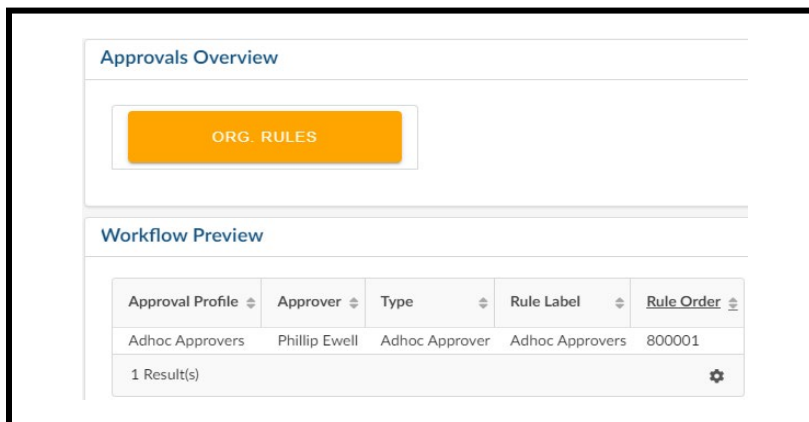
This section will cover the steps to view your orders approval flow and which approvers need to take action still.



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



2. Click "Upcoming Approvals & Ad hoc".

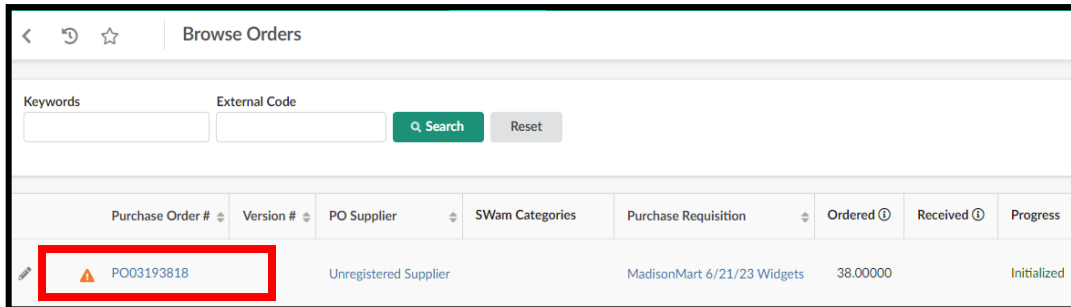


3. Under the workflow preview you can view upcoming approvals depending on the rules assigned by eVA when your order is submitted.

## Cancelling an Order in eVA

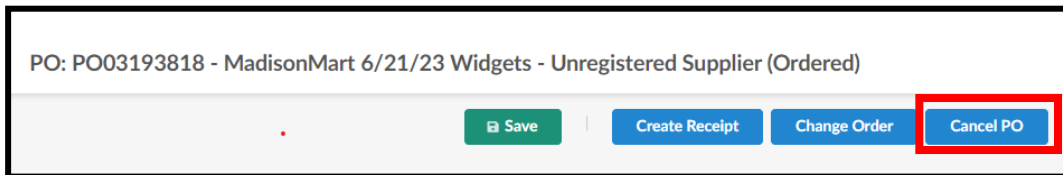
This section covers the process of cancelling an order in eVA. Cancelling an order in eVA should be done in coordination with the vendor on the order. This process only changes the status of the order in eVA and vendors who receive their orders through punchout catalogs may not notice the status change.

1. Navigate to your Purchase Order, see "[Orders](#)" section for instructions. Click on the PO link that needs updated (the blue PO##### text).



Purchase Order #	Version #	PO Supplier	SWam Categories	Purchase Requisition	Ordered	Received	Progress
PO03193818		Unregistered Supplier		MadisonMart 6/21/23 Widgets	38.00000		Initialized

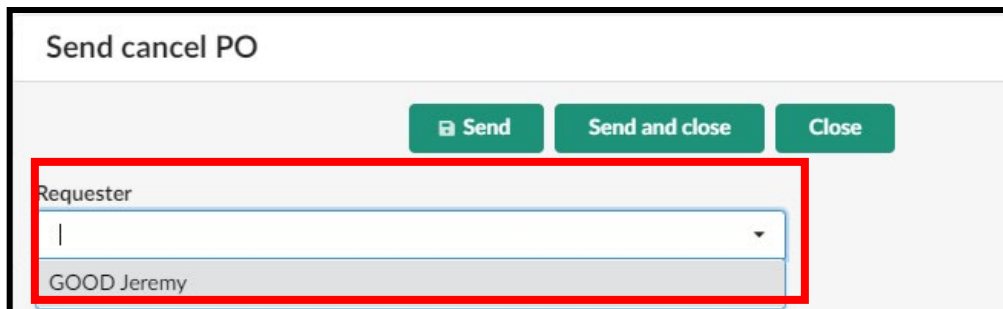
2. Click "Cancel PO".



PO: PO03193818 - MadisonMart 6/21/23 Widgets - Unregistered Supplier (Ordered)

Save | Create Receipt | Change Order | **Cancel PO**

3. Select yourself as the "Requestor" from the dropdown box.



Send cancel PO

Send | Send and close | Close

Requester

GOOD Jeremy

4. Leave the notification text as is. Select a vendor contact from the "Send to" box; if there is not a contact available click "No Supplier Contact". Once this has been done, click Send and close.

## Creating a change order in eVA

This section will cover modifying an already fully approved order in eVA. The difference between withdrawing and changing an order is the approval status, you can only create a change order once you have a PO. Change orders should be made when an eVA user has communicated the change clearly to the vendor on the order, eVA does not communicate change orders very well and creating a change order without contacting the company **may result in duplicate orders**. Change orders should not be made to change account or expense codes, the final routing of the money will be decided by the Bank of America reconciliation or by the Accounting Transaction Voucher.

1. Navigate to your Purchase Order, see "[Orders](#)" for further instructions. Click on the PO link that needs updated (the blue PO##### text).

Purchase Order #	Version #	PO Supplier	SWam Categories	Purchase Requisition	Ordered	Received	Progress
PO03193818	1	Unregistered Supplier		MadisonMart 6/21/23 Widgets	38.00000		Initialized

2. Click "Change Order".

- Fill out the "Change Type(s)" and "Description of Changes" fields before moving on.

**Change Order**

Significant Change Request? ⓘ  
 No  Yes

Amend#

Change Type(s)\*

Description of Changes ⓘ

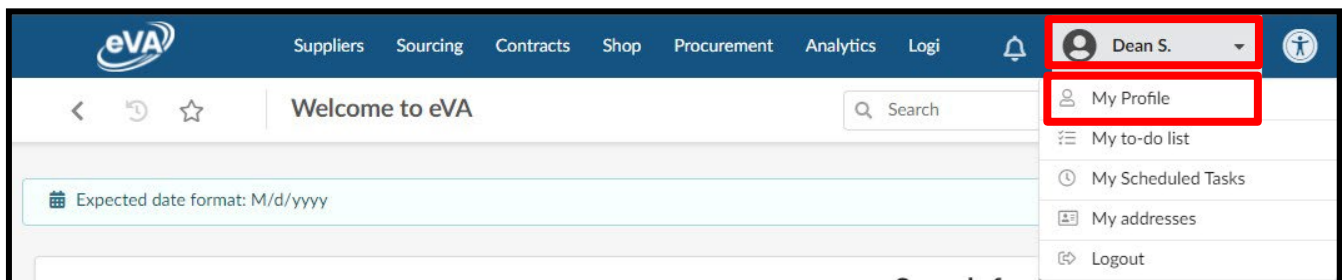
- After you have made the necessary changes to the PO, click "Submit for Approval". When you submit, the original PO will be cancelled and this new PO will supersede it in eVA.

## 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

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



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

**Pcard Info**

Add Pcard

Pcard Label	Card Number
Test Card	*****4321
Duke Dog SPCC	*****6321

2 Result(s)

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

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

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

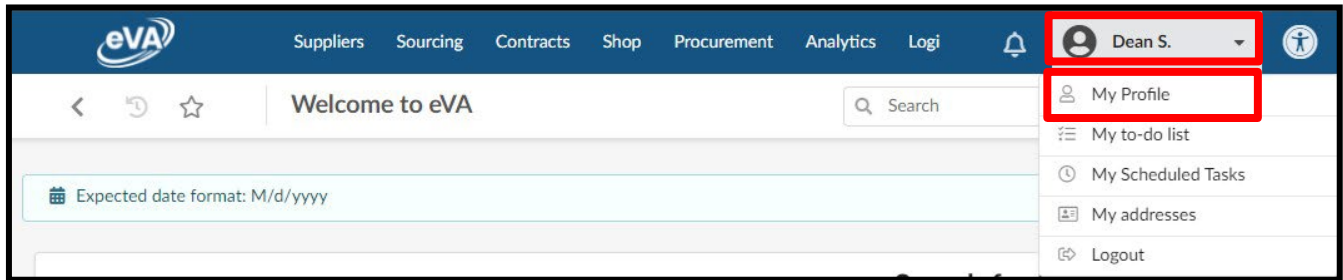
This screenshot is a close-up of the top right corner of the 'PCard Manage' form. It shows the 'Save & Close' and 'Close' buttons. A red rectangular box highlights the 'Save & Close' button. Below the buttons is the same light blue banner with the text 'Fields marked by an asterisk \* are mandatory'.

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

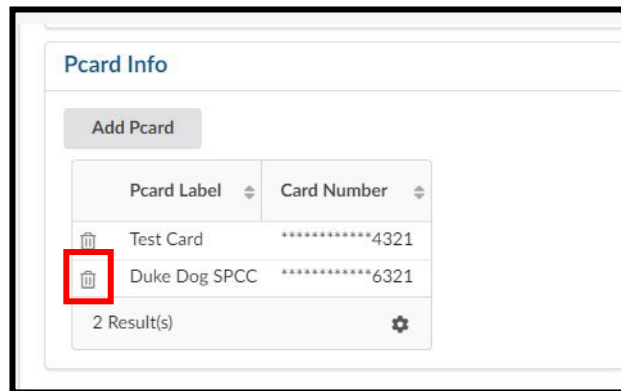
## How to update and remove your SPCC

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

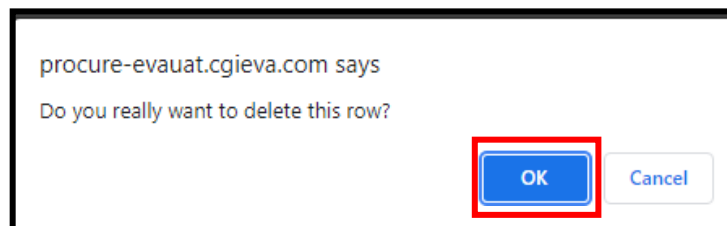
1. Click the **YOUR NAME Icon** and in the dropdown menu, click **My Profile**



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



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



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

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

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

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

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

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

The screenshot shows the 'Workflow Preview & Ad hoc' window. It features a search bar, a navigation menu with a red box around the 'Ad-Hoc Approver' icon (a person with a plus sign), and a main area titled 'Approvals Overview' with a button labeled 'ORG. RULES'.

3. Click **Insert Approvers**

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



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

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

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

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

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 rectangular box. Below the buttons, the window contains a section titled "Adhoc Approvers" with a sub-header "Adhoc Approvers will be inserted at the end of the workflow." There is a text input field containing "Dickens Caroline" with a close button (x) and a plus sign. Below that is a "Reason" field containing 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 rectangular box. Below the buttons, the window contains a section titled "Ad-Hoc Approvers" with an "Insert Approvers" button. Below that is a table with the following data:

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

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

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 interface for a requisition titled 'Requisition: REQ002155 - Example-'. The left-hand navigation menu has a 'Pcard' icon highlighted with a red box. The main content area shows the 'Header' section with the following fields:

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

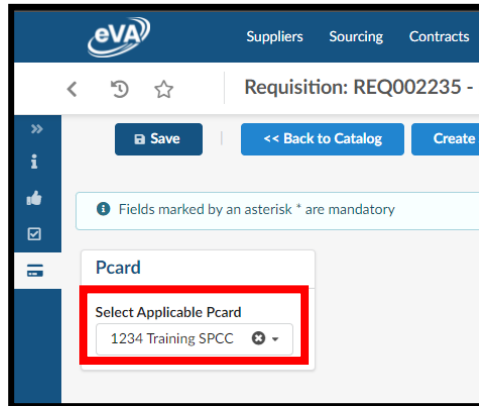
2. From the Pcard tab, select the dropdown arrow for **Select Applicable Pcard**. Select the appropriate SPCC for the requisition, then click **Save**.

The screenshot shows the eVA interface for a requisition titled 'Requisition: REQ002235 - Example-'. The 'Save' button is highlighted with a red box. The 'Pcard' section is active, showing a dropdown menu for 'Select Applicable Pcard' with the following options:

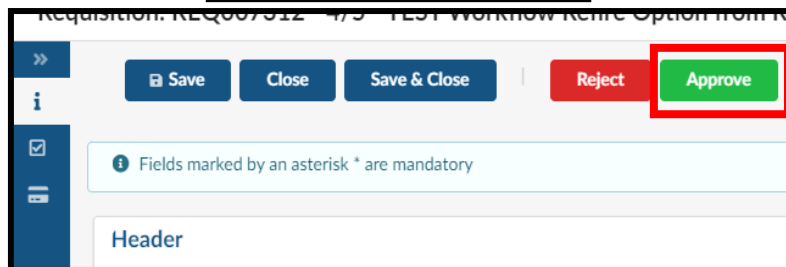
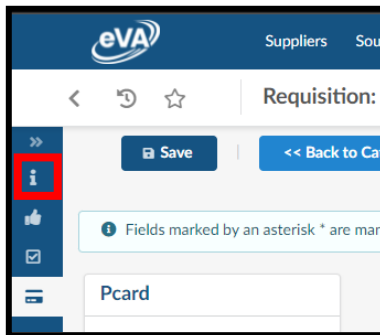
- 1234 Training SPCC
- Duke Dog SPCC
- New Test CArd
- Test Card

The dropdown arrow is also highlighted with a red box. A 'See All' link is visible at the bottom of the dropdown menu.

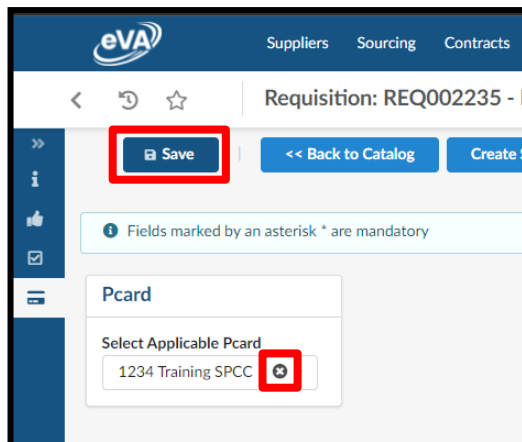
3. Once the selected SPCC is listed under **Select Applicable Pcard**, after the requisition is fully approved, it will generate a PCO. If the supplier accepts electronic orders and Pcards, the selected SPCC will be visible to the supplier in their eVA account.



- If you are adding your SPCC onto a requisition as part of an ad hoc approval 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	Organization
Jeremy	A216-JMU Purchasing
Type	PO Category
Purchase	R01 - Routine
Requester	Reference Number
Fahrney Mikayla	
Procurement Transaction Type	
Supplies - Non-Technology	

The Requester field, containing "Fahrney Mikayla", is highlighted with a red border.

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

The screenshot shows the Pcard selection interface with the following elements:

- Pcard** (Section Header)
- Select Applicable Pcard** (Section Header)
- A dropdown menu with the following options:
  - MFahrney** (Selected and highlighted with a red border)
  - Jeremy Good
- 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

Validated successfully

Header

Name: Jeremy

Type: Purchase

Approvals

Approval History

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

2 Result(s)

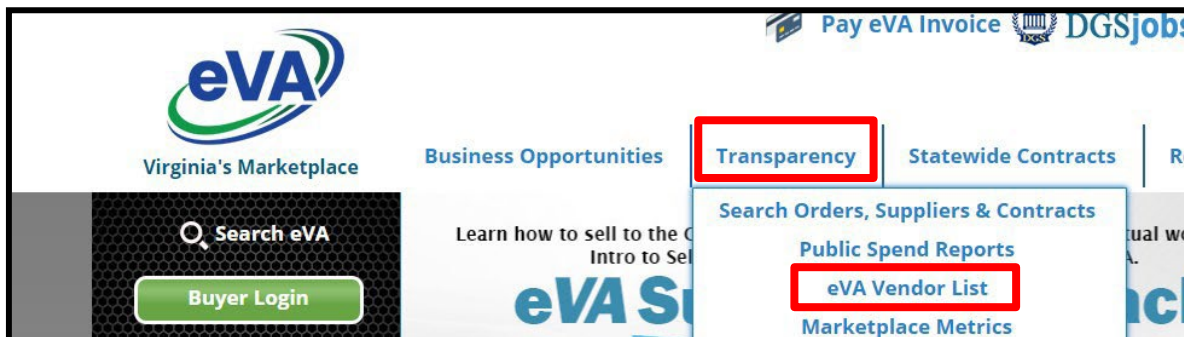
## Searching for Suppliers, Orders, & Requisitions

### Suppliers outside of a requisition

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

To search the public eVA Vendor list

- Go to the eVA homepage [eva.virginia.gov](http://eva.virginia.gov)
- From the top center, click **Transparency**, then **eVA Vendor List**



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

Search for name, vendor Customer Code or VLIN  
 with search logic.

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

Maximum of 1,000 vendors are displayed.

To navigate buttons or enter page# and click your TAB key.

Status	HQ	VendorID (Click for Details)	eMail Supplier Name (Vendor Loc. Std Name)	eMail Contact (Location Name)	Address 1	City	St	Zip
--------	----	---------------------------------	---	----------------------------------	-----------	------	----	-----

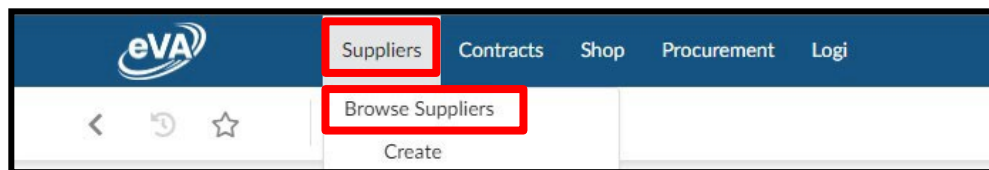
7. Once the search result return, and you have identified the correct supplier record there are several items of use on this listing
- Status – will indicate if the supplier is self-registered (Self) or state-entered (State)
  - VendorID - can be used to search for a supplier (instead of supplier name) in the **Items Details** window while creating a requisition

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

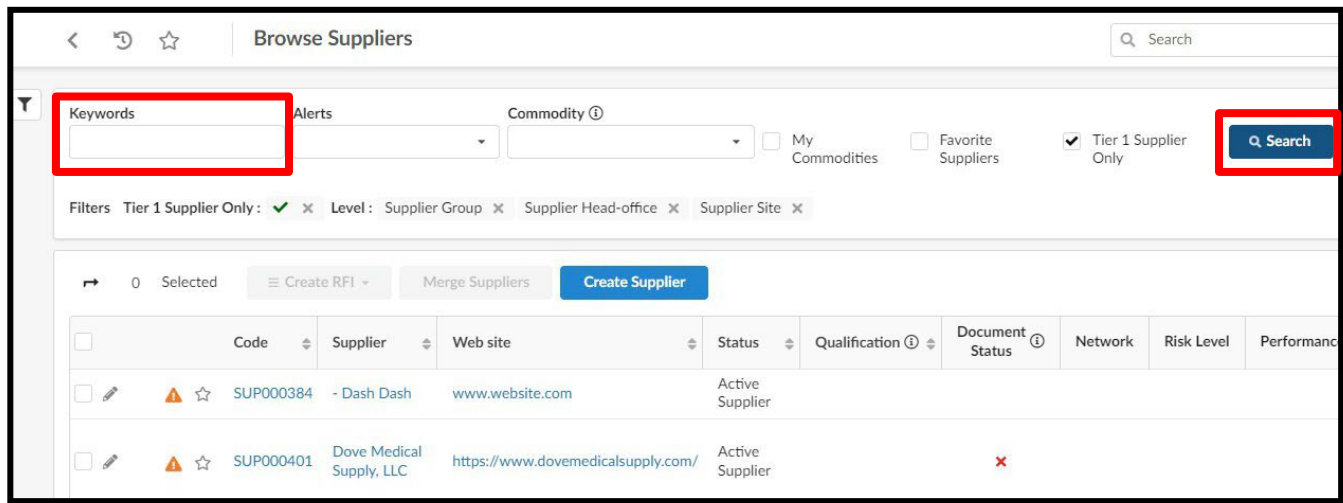
Report9001.2.1

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

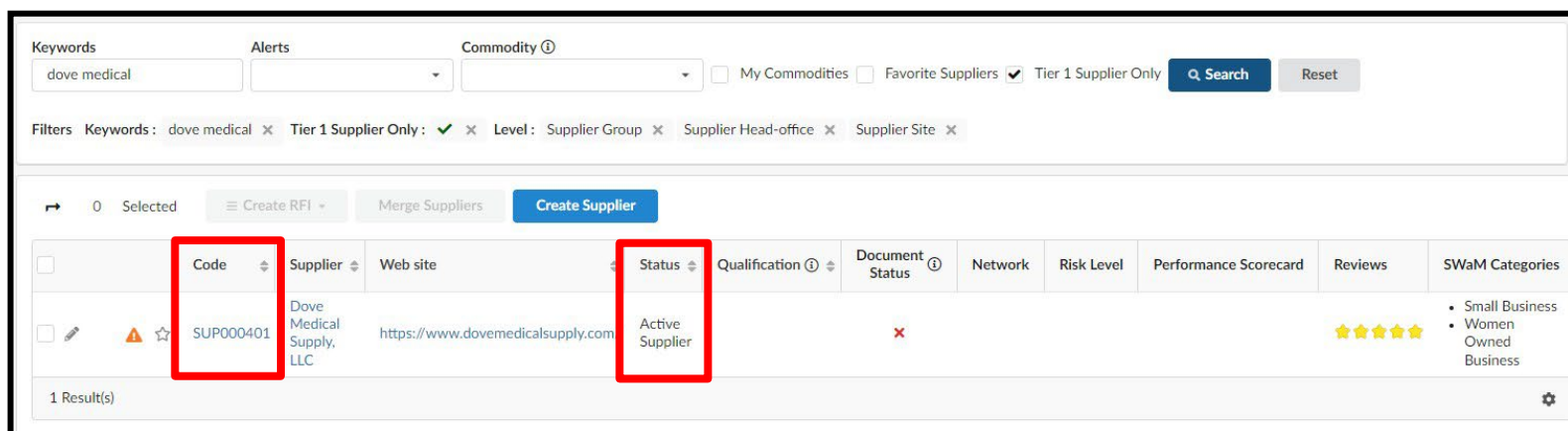
1. Click **Suppliers** and then in the dropdown menu, click **Browse Suppliers**



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



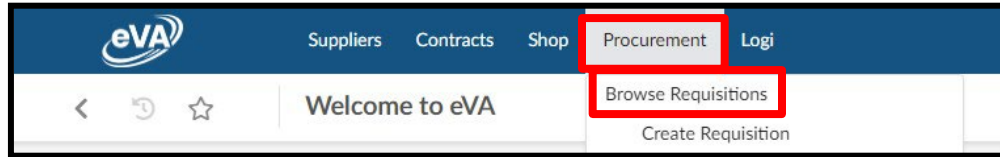
3. Once the search results are returned there are several items to make note of
  - **Code** – this is the supplier's eVA ID number that can be used to search with when creating a line item, instead of the supplier's name.
  - **Status** – this indicates the supplier's eVA status. Previously a deactivated supplier would not show up in 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.





## Requisitions

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



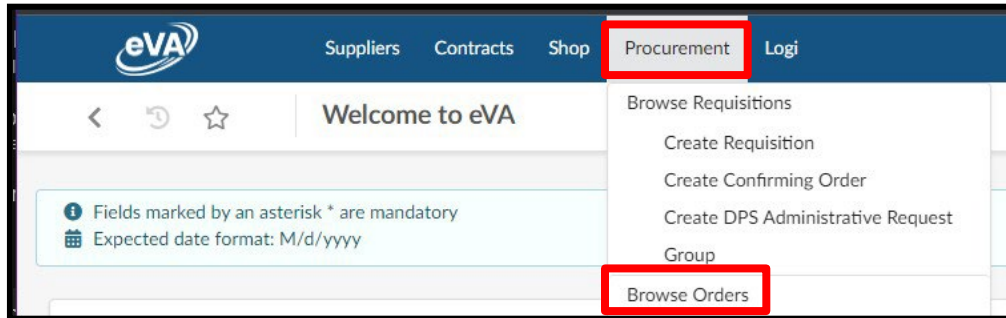
2. From the **Browse Requisitions** page, you can enter several options into the Keywords field. For example, you can enter the REQ# or the partial requisition name (formerly requisition title), then click **Search**.

- 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**

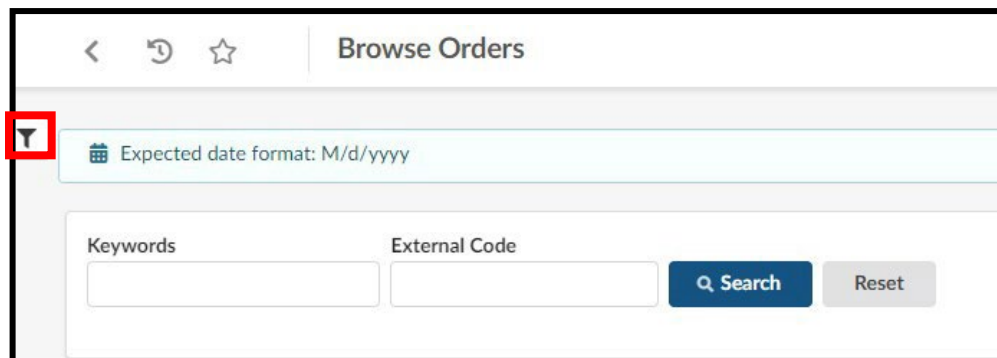
## Orders

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.

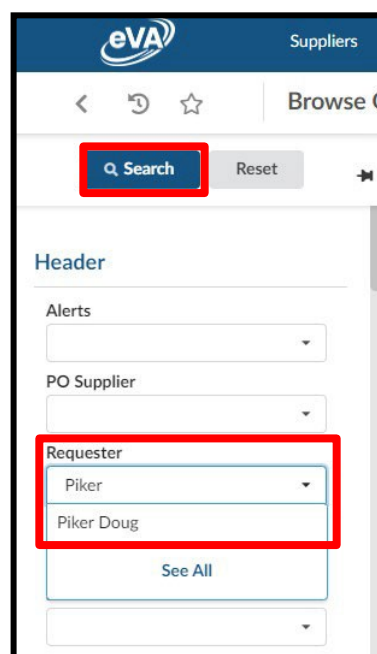
1. Click **Procurement** and then in the dropdown menu, click **Browse Orders**



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

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

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

## Adding Attachments to a Requisition

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

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

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

Save
Submit for Approval
<< Back to Catalog
Reset Allocations

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"/>	7018-1	Product		Example Line Item	( Dove Medical Supply, LLC ) Dove

1 Result(s)

> Allocations

> Approvals

> Attachments

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

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

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

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

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

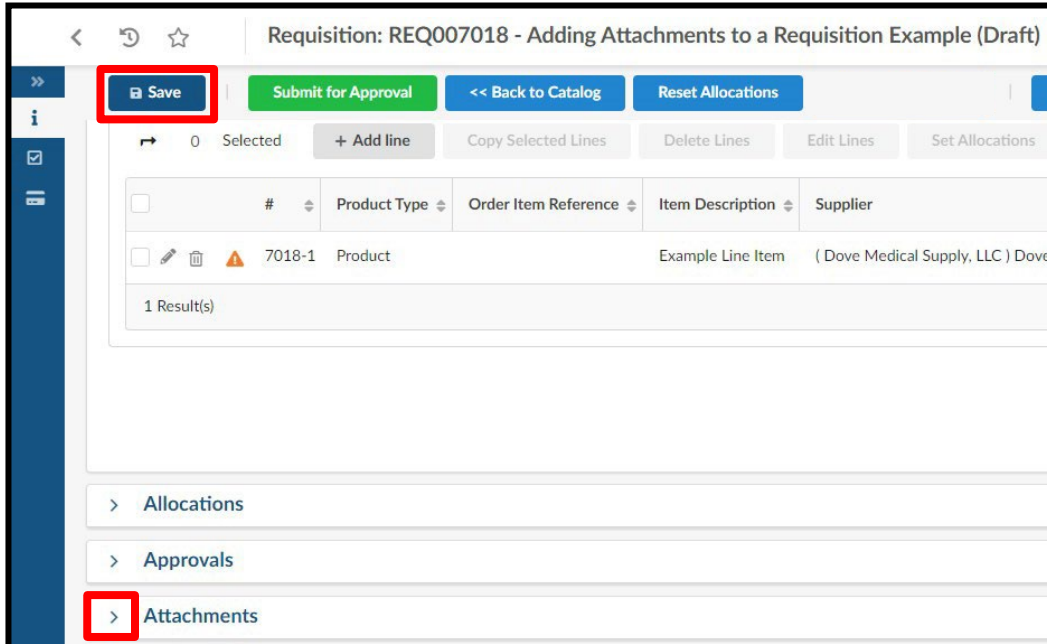
6. If you need to delete an attachment, click the **X** icon

This close-up screenshot focuses on the 'Document' section of the form. It shows the 'Document' dropdown menu set to 'English' and the 'Click or Drag to add files' button. Below this, two attachments are listed: 'EN - BH Quote 1081174704.pdf' and 'EN - Example Attachment.docx'. The 'X' icon next to the PDF attachment is highlighted with a red rectangular box, indicating the action to delete the file.

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

This screenshot shows the full document form again, but now with two attachments listed under the 'Document' section: 'EN - BH Quote 1081174704.pdf' and 'EN - Example Attachment.docx'. The 'Save & Close' button at the top of the form is highlighted with a red rectangular box, indicating the final step to save the document.

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



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



## Adding a Contract Number to a Line Item

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

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

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

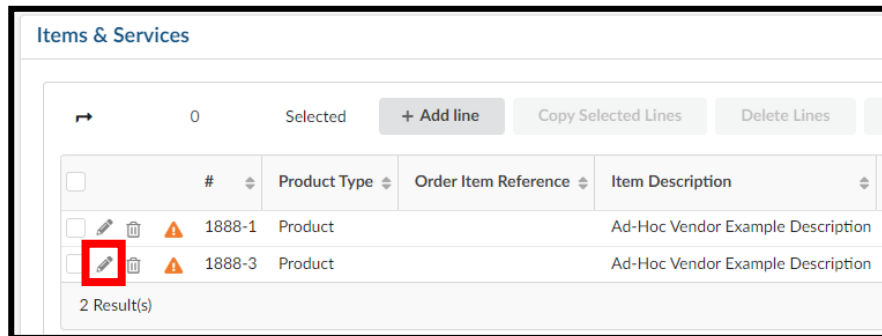
## Breaking Out Shipping Charges

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

1. 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 'Selected' status and a '+ Add line' button. The 'Copy Selected Lines' button is highlighted with a red box. Below this, there is a table with columns: '#', 'Product Type', 'Order Item Reference', and 'Item Description'. The first row has a checked checkbox in the first column, a trash icon, a warning icon, the number '1888-1', the text 'Product', and the text 'Ad-Hoc Vendor B'. Below the table, it says '1 Result(s)'.

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



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

The screenshot shows the 'Item Details' pop-window. At the top, there are buttons for 'Save', 'Save & Close', 'Close', and 'Reset Allocations'. The window is split into two main sections: 'Item Description' on the left and 'Estimate Costs' on the right. In the 'Item Description' section, the 'Product Type' dropdown is set to 'Shipping', 'Short Description' is 'Shipping Fee', 'Order Qty' is '1.00', and 'Commodity' is '96286 - Transportation of Goods and Other Freight Services'. In the 'Estimate Costs' section, the 'Unit Price' is '15.00' and the currency is 'USD'. Red boxes highlight these specific fields.

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