New eVA Transition Guide

Version 3.0
Updated July 3, 2023

JMU Procurement Services

Need eVA Help? Contact Us!
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Table of Contents

Table of Contents

New eVA Overview

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

Changes as a Result of the New Platform

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

SPCC converted from previous eVA

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

SPCC no longer defaulted to "Use Pcard"

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

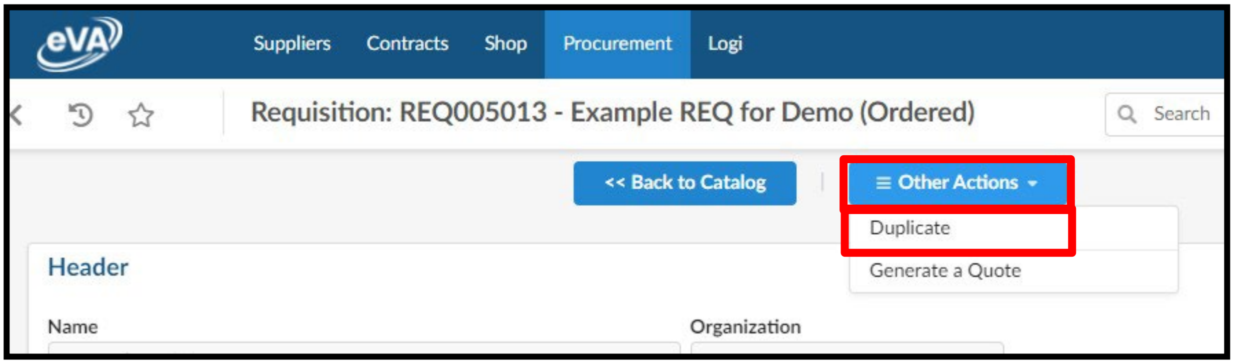
SPCC no longer can be edited

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

"Copy" now called "Duplicate"

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

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



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

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

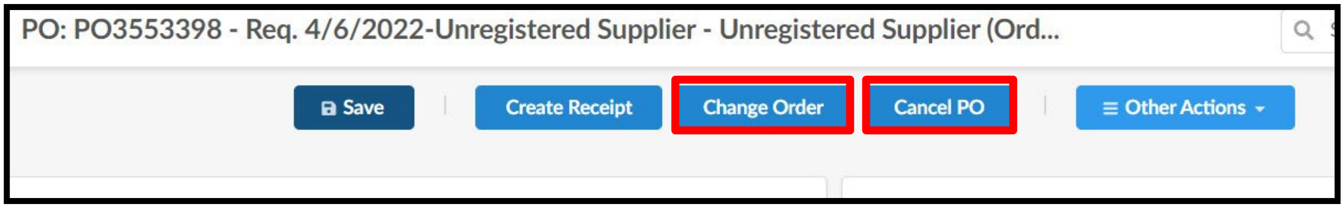
Prefixes on purchase orders and requisitions

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

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

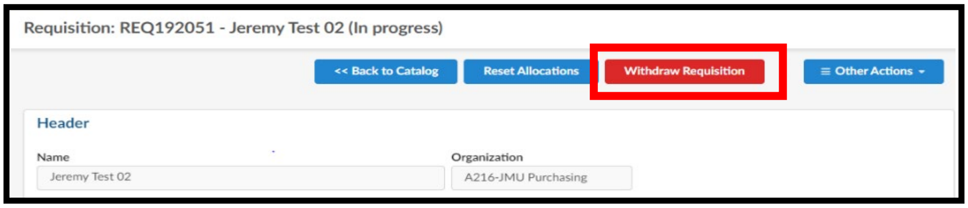
Options to change or cancel a purchase order moved

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



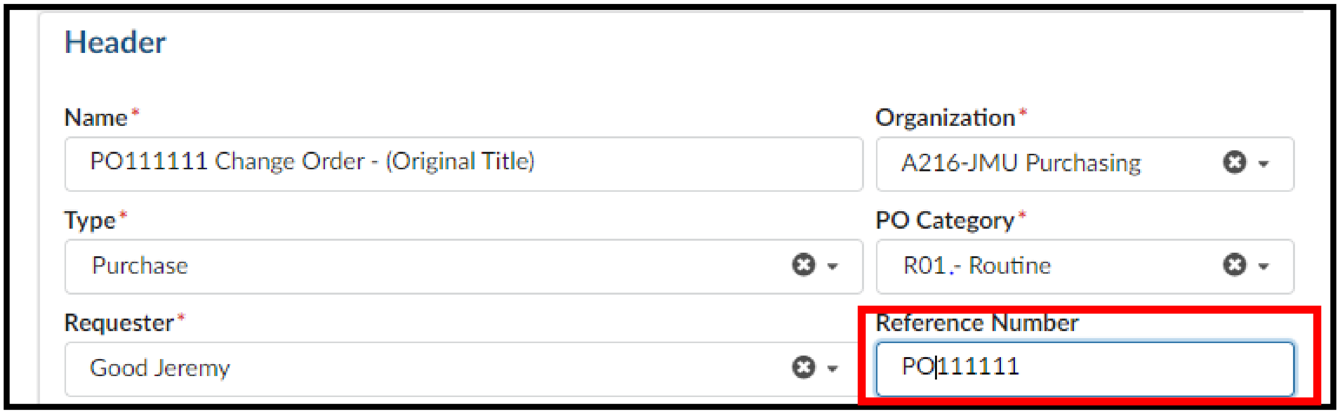
Options to withdraw a purchase order

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

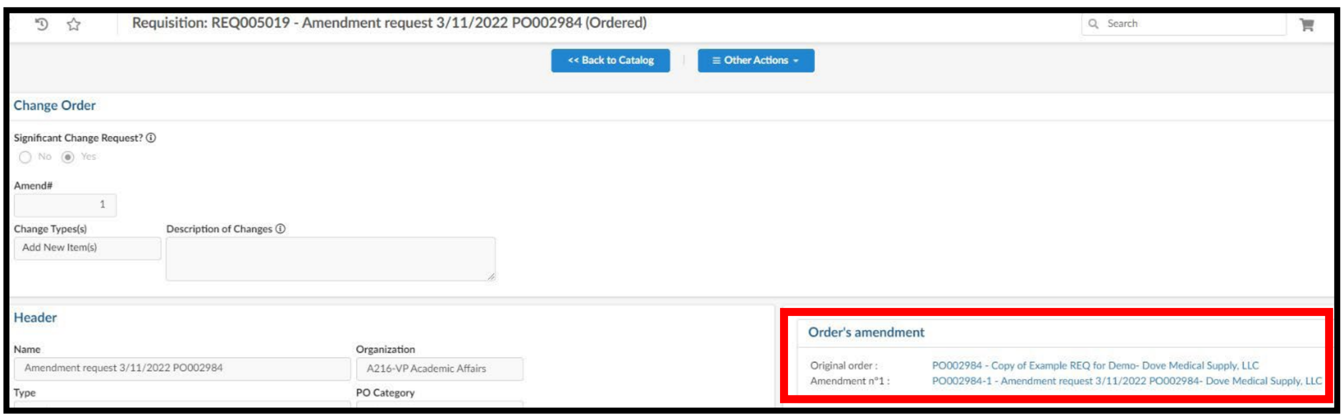


Change order numbering

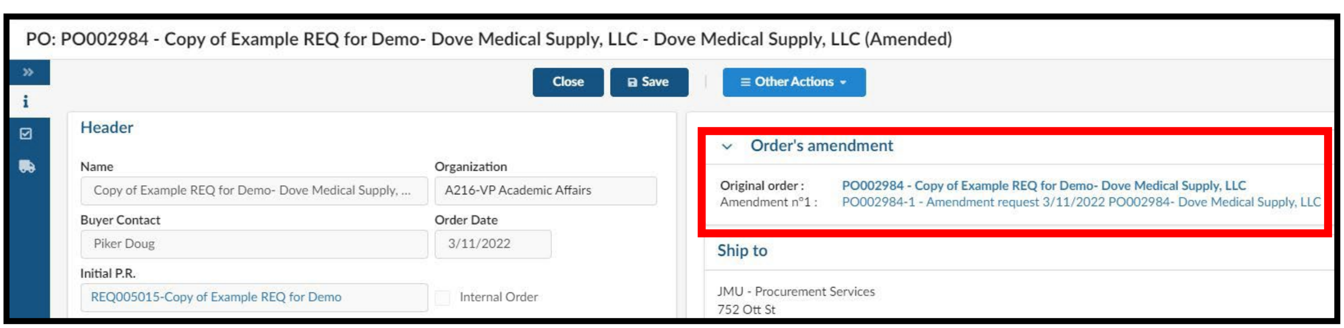
Converted Orders
In new eVA, a converted order from the old eVA system will be able to be edited through a change order. When creating a change order on a converted order from the old eVA system, it is important that you include the original order number in the title or in the Reference Number section.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



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.**



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.**



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

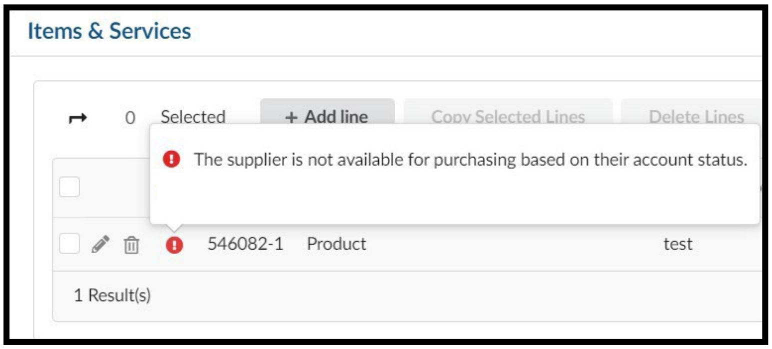
The New eVA platform no longer allows you to select a checkbox for an attachment to be visible to supplier or internal only. Rather when adding the attachment(s) you will need to select if it is an **Internal Attachment** or a **Supplier Document**, after that selection has been made you can't switch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

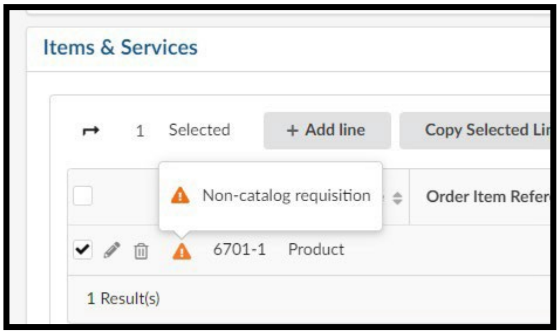
Vendors may not get your orders electronically

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.

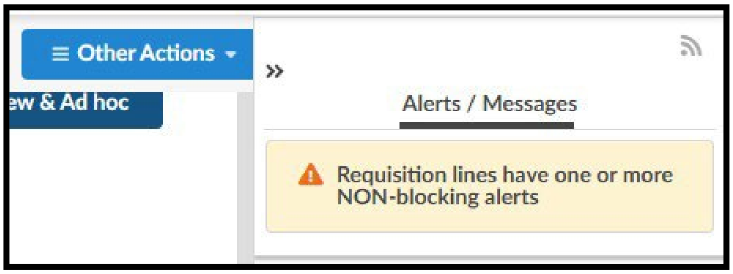
Non-catalog requisitions and purchase orders display a warning icon

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

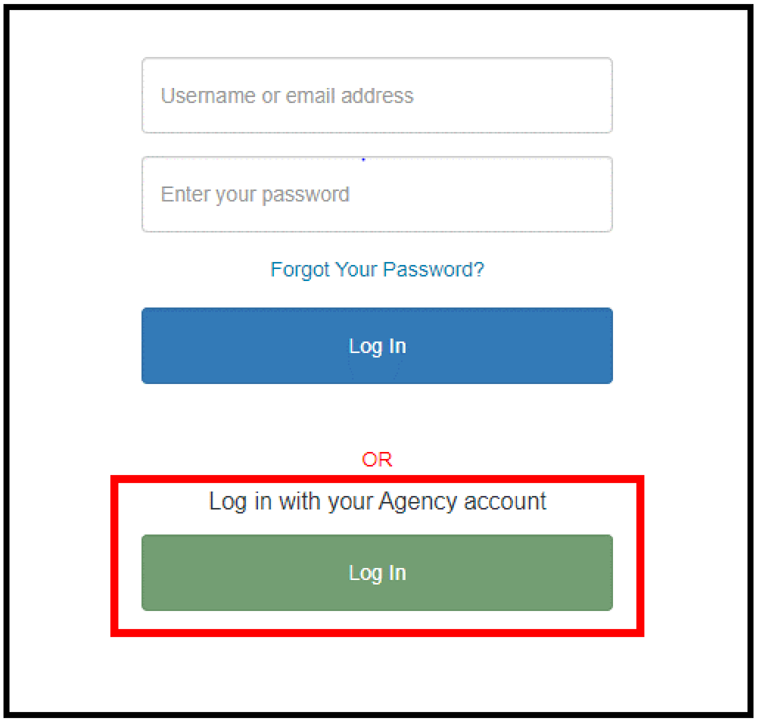


On the top right



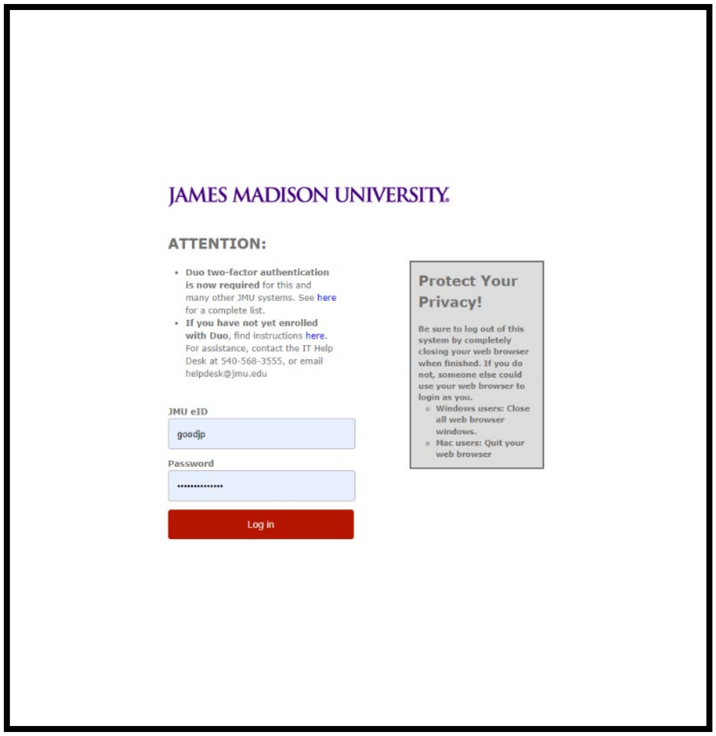
Signing into eVA

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



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

Click "JMU" from the listing of Universities



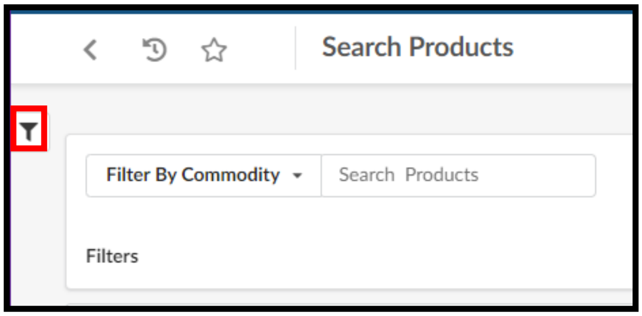
Login with your eID and Password, once you have you will receive a Duo push to finalize login.

Creating a Punchout Catalog Order

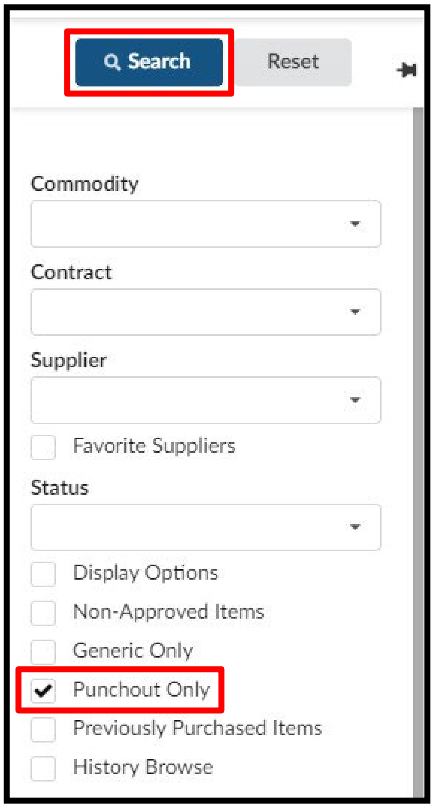
This section covers the process to complete an order with a punchout catalog supplier. Please note that at this time, if you create a punchout catalog order and need to edit the order, eVA will not let you re-visit the punchout catalog. Instead you will need to delete/cancel the order and re-submit with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

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

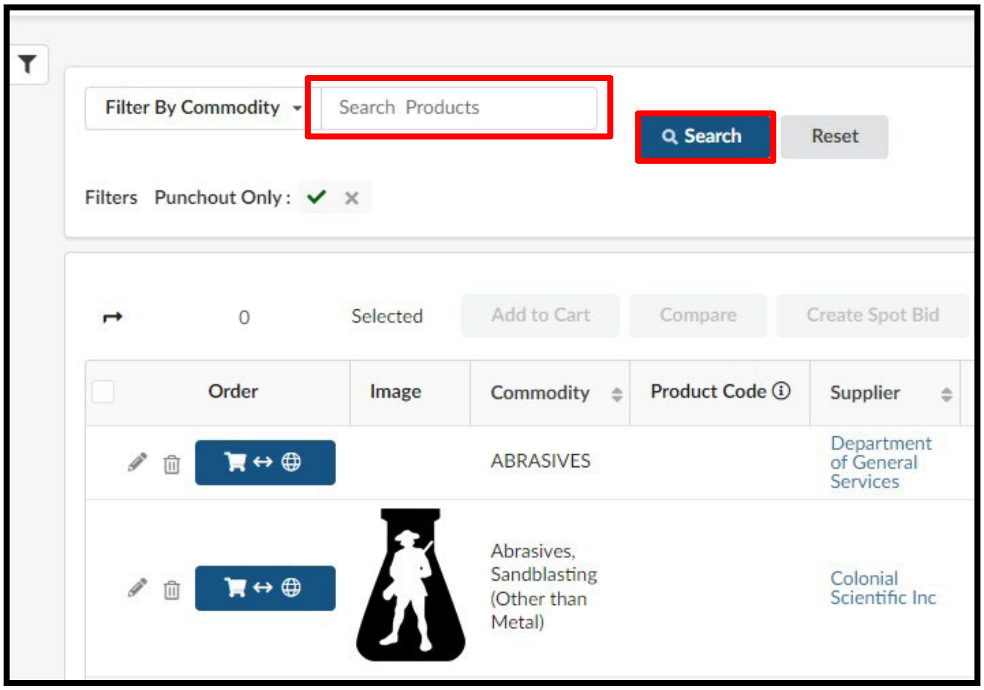
2. Click the **Filter** Icon on the left-hand side



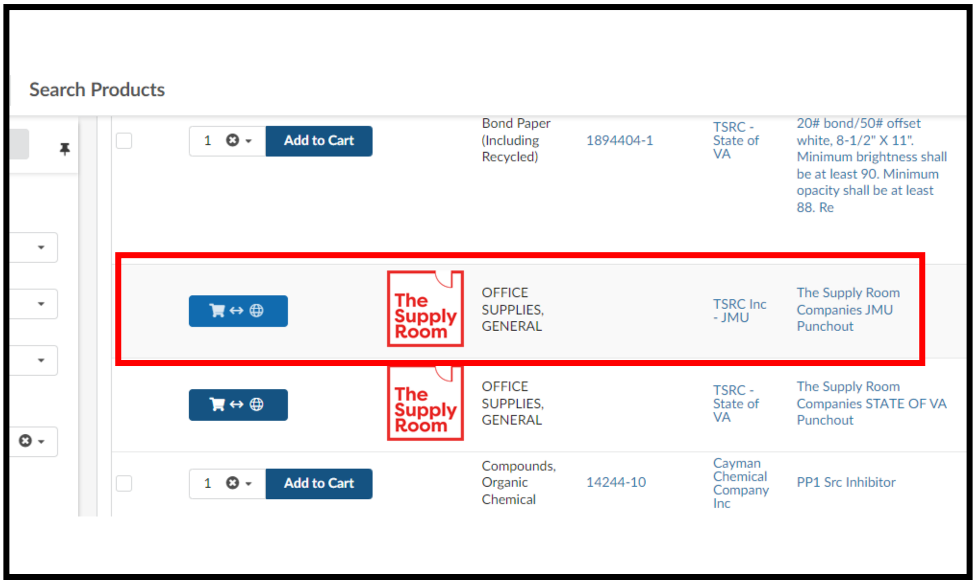
3. The Filter menu will expand out, click the checkbox next to **Punchout Only**, and then click **Search**



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.

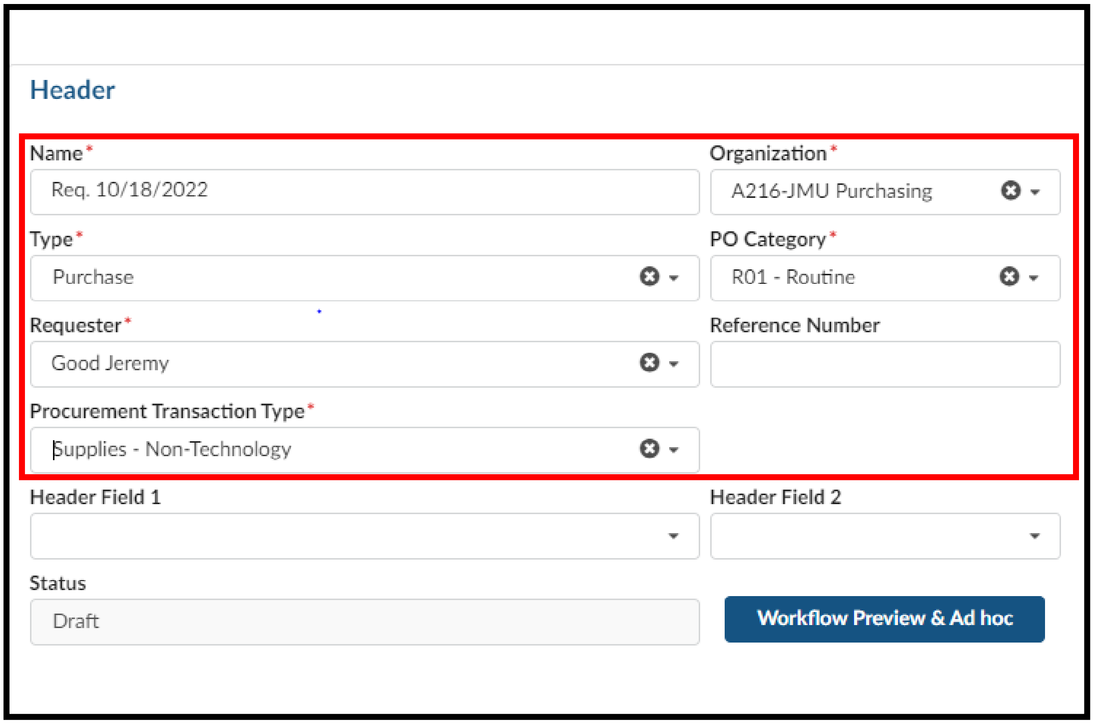


5. Once you have found the punchout catalog for the supplier you need, click the **Shopping Cart / Globe Icon.** You will then be taken to the supplier's punchout catalog to shop as you normally would. **There are several punchout catalogs for bigger suppliers, please make sure you are choosing the JMU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

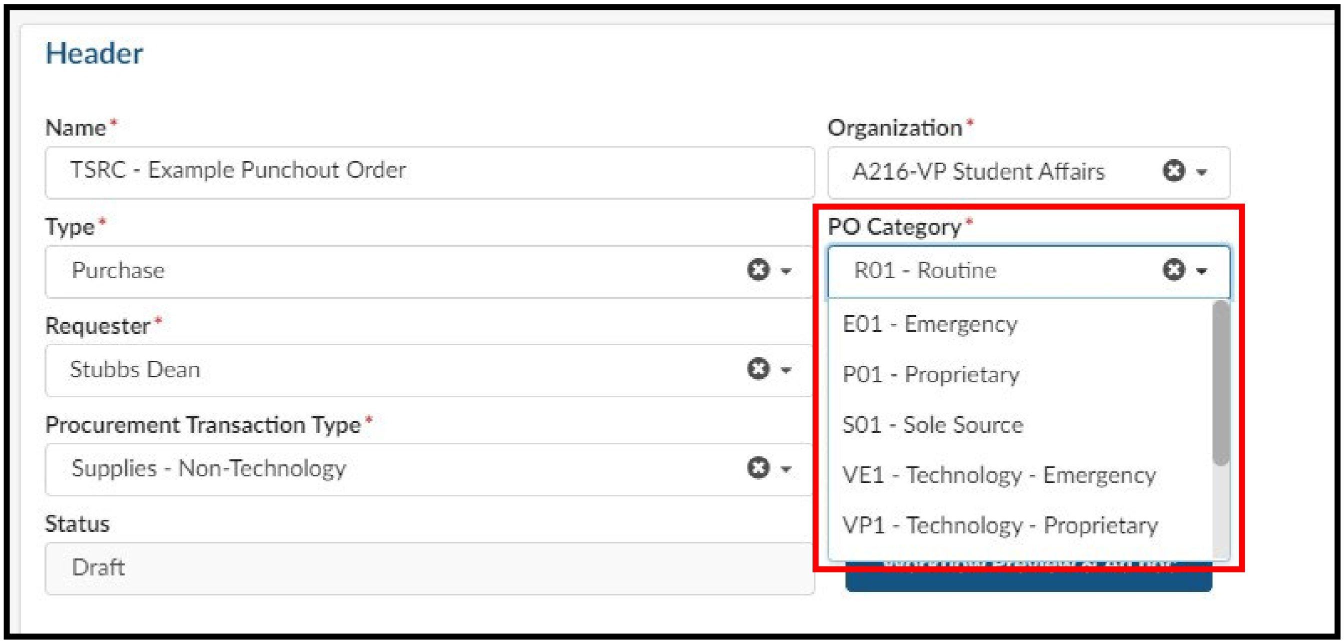


8. Fill in the **Name** field (*this was previously the title field)*

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

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

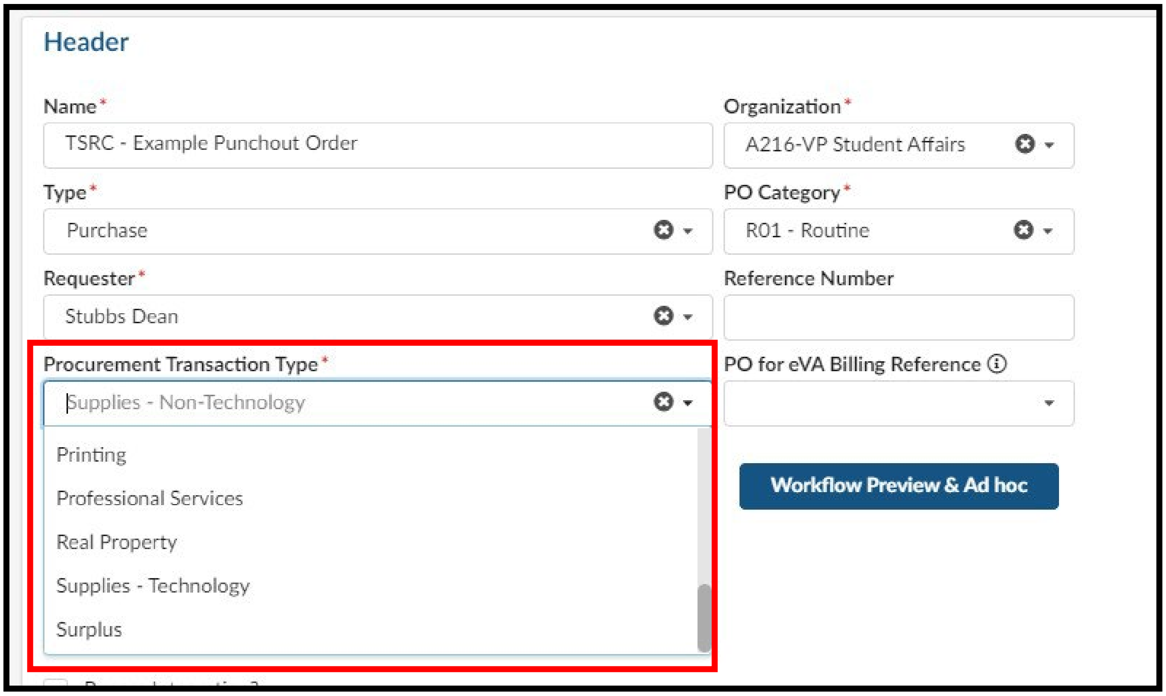
11. Select the dropdown arrow for **PO Category**, and click on the appropriate selection, typically **RO1 – Routine**



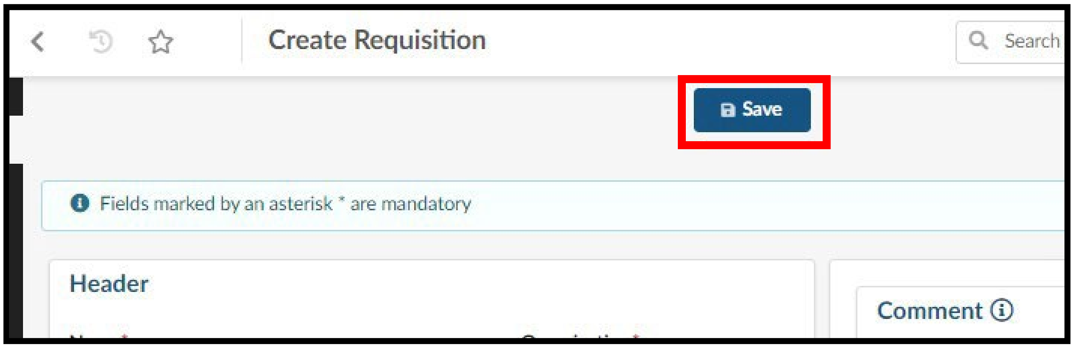
PO Category Refresher:

- 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.

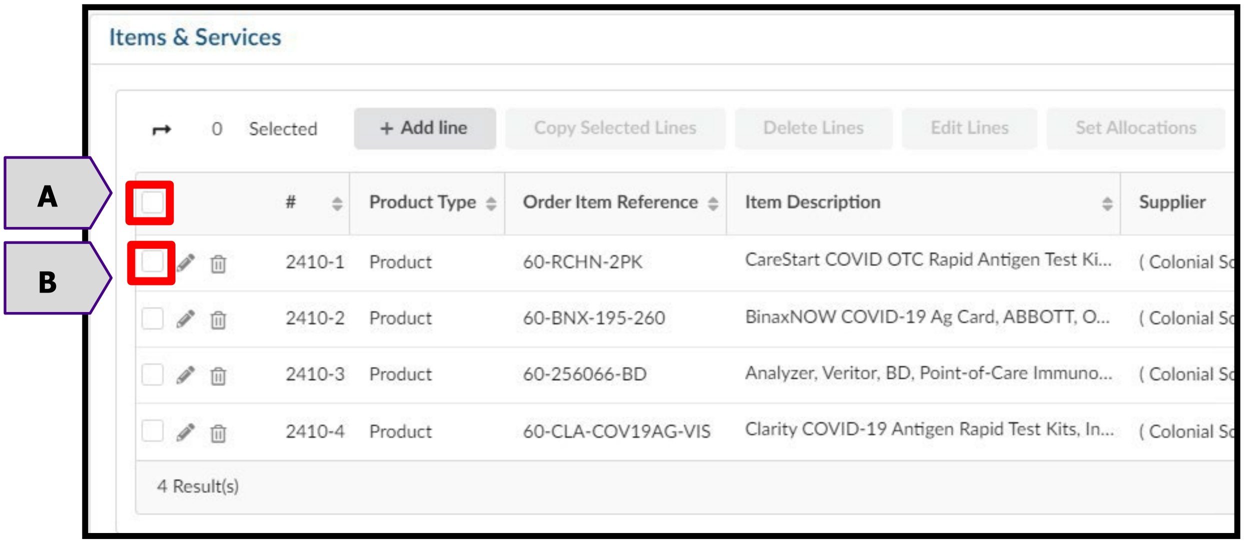
12. Select the dropdown arrow for **Procurement Transaction Type,** and click on the appropriate selection



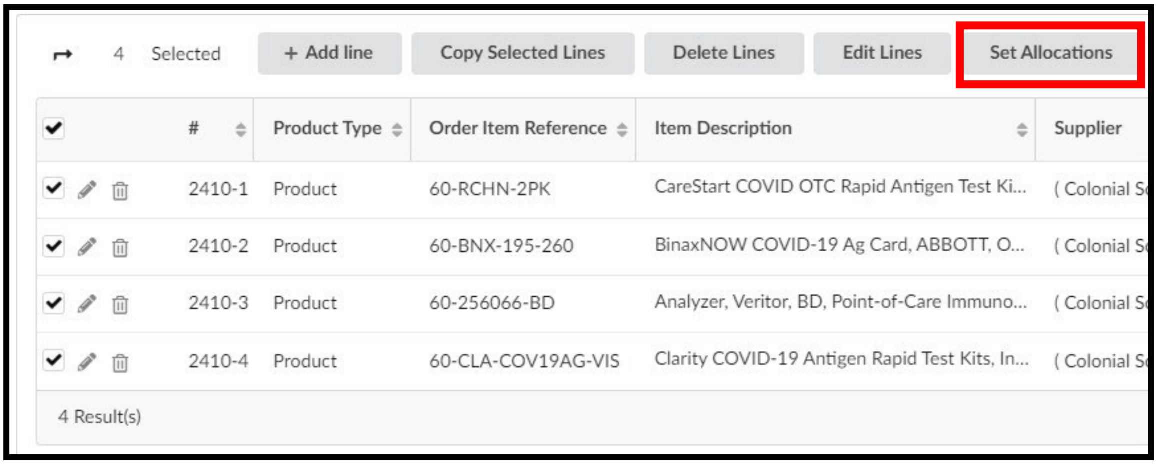
13. After completing the required header fields, click **Save**
    - If any of the required header fields have not been completed you will get an error message when attempting to save



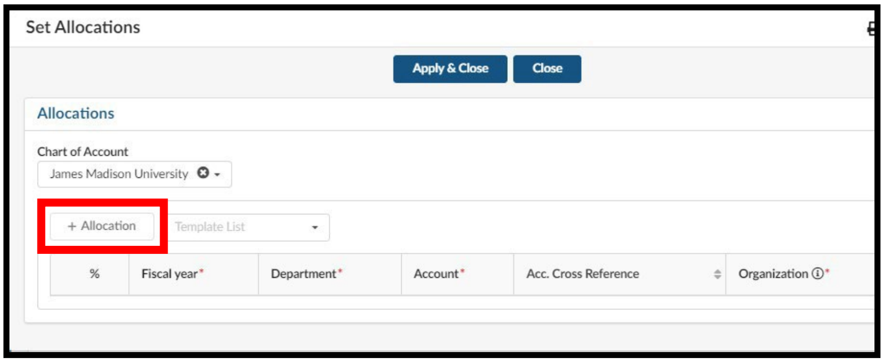
14. Under **Items & Services** click on the appropriate checkbox
    - A: This checkbox is used to select all line items. Use this when you want to set all line items to the same Department code and Account code.
    - B: This checkbox is used to select individual lines. Use this when you need to set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



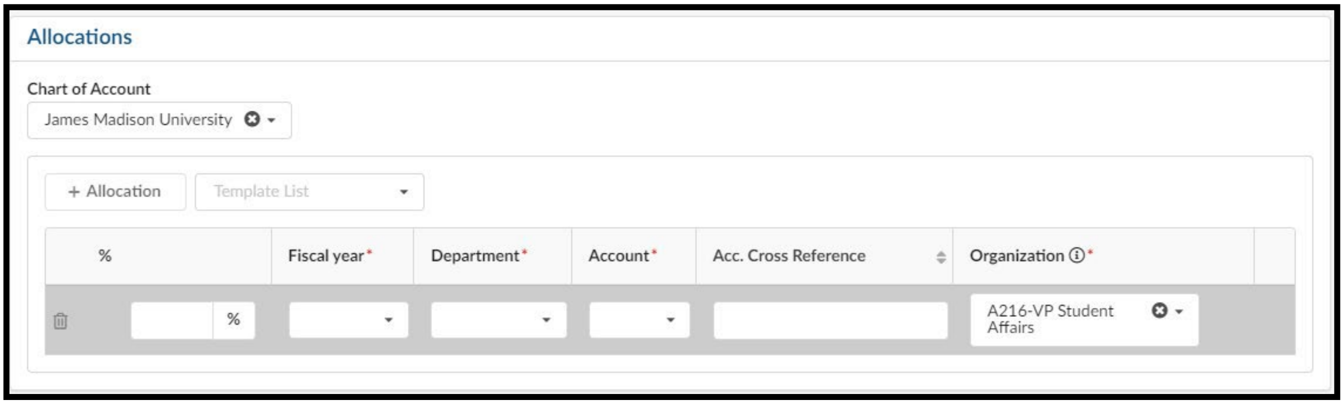
15. Click **Set Allocations** (*Formerly Accounting*)



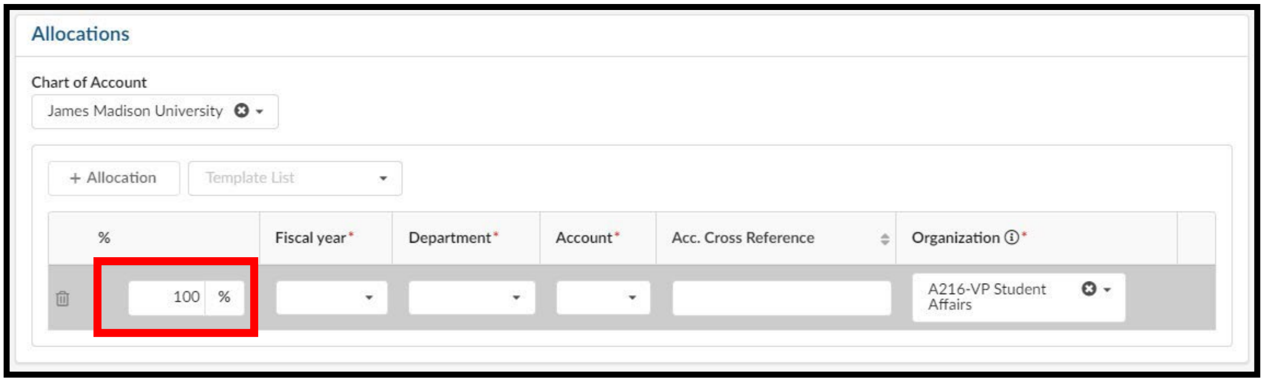
16. The Set Allocations window will display, click **+ Allocation**



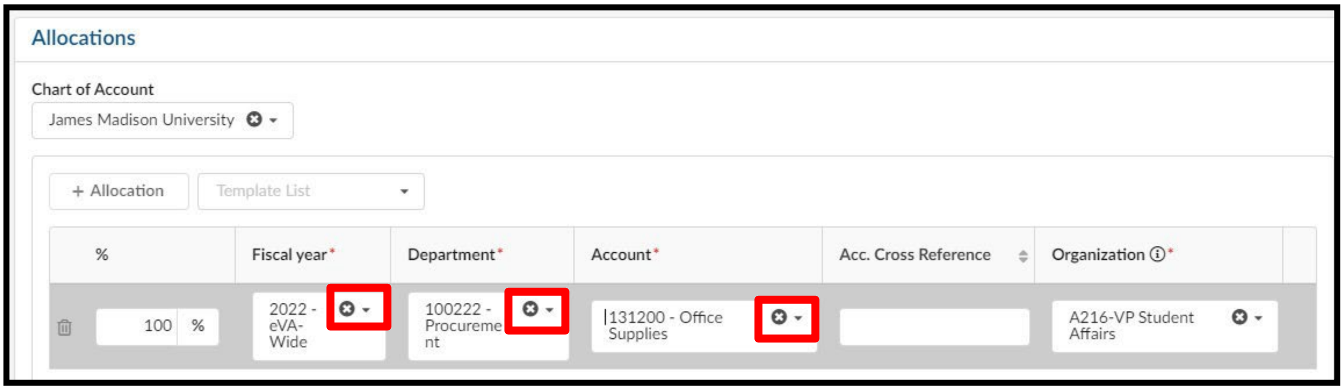
17. A new row will display allowing you to enter required allocation information.



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

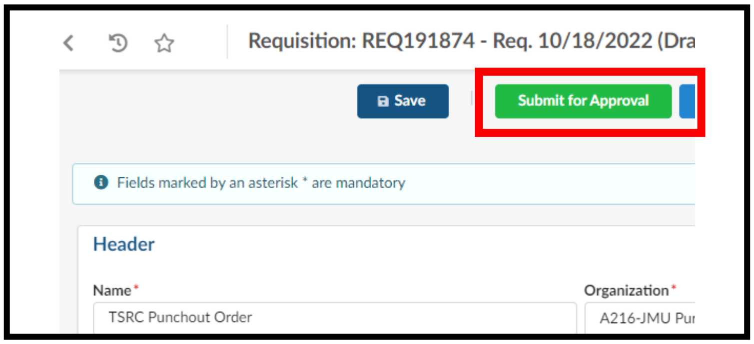


19. You will now complete the other required allocation fields.
    - Select the dropdown arrow for **Fiscal year** and click or type in the appropriate selection
    - Select the dropdown arrow for **Department** and click in the field and begin typing the department name or department number. The system 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.



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

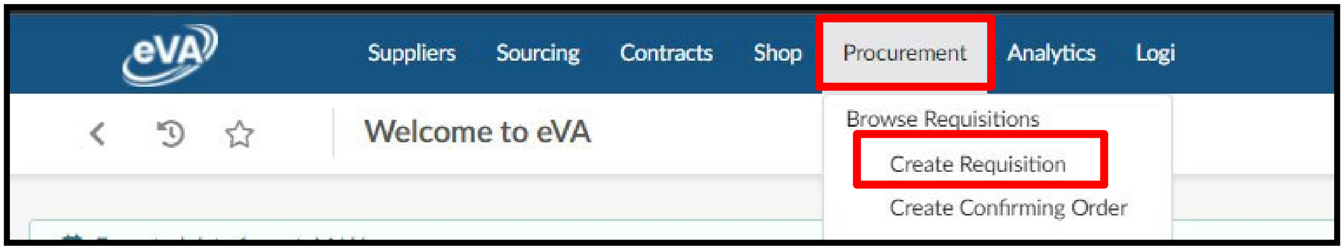
21. You can now submit the requisition. At the top of the page, click **Submit for Approval**
    - If the requisition is not within your expenditure authority, your approver will need to approve it.
    - In some situations, based on the items purchased or the dollar amount, the requisition may require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



Creating a Non-Catalog Order

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

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

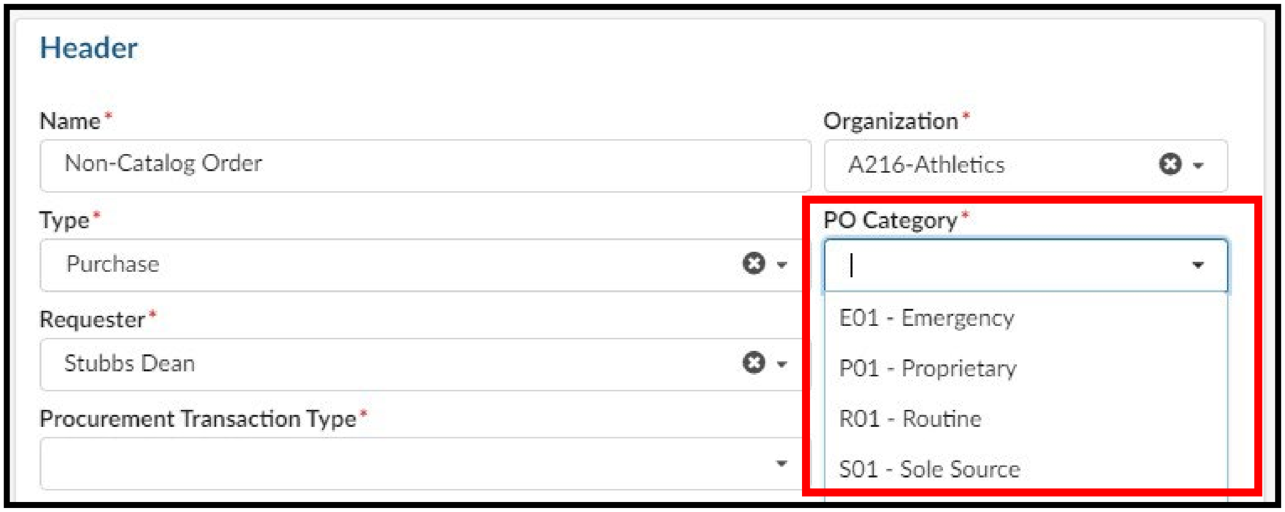


2. Fill in the **Name** field (*this was previously the title field*). This field should be filled in with general details about what the order is for.

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

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

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



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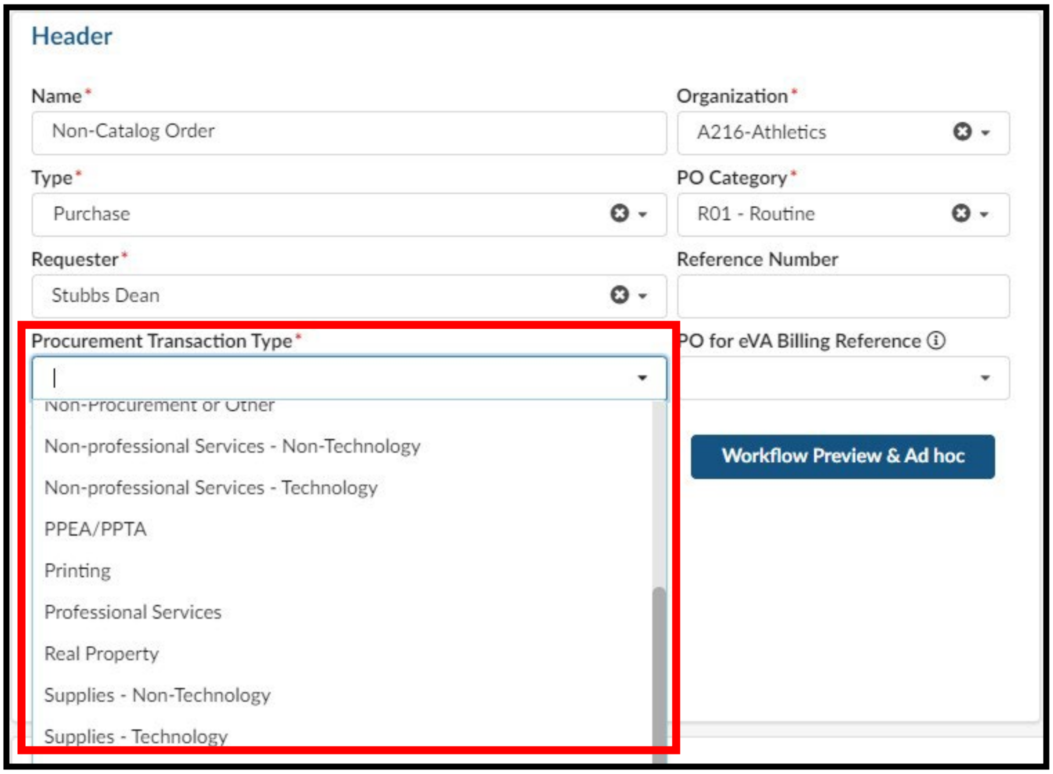
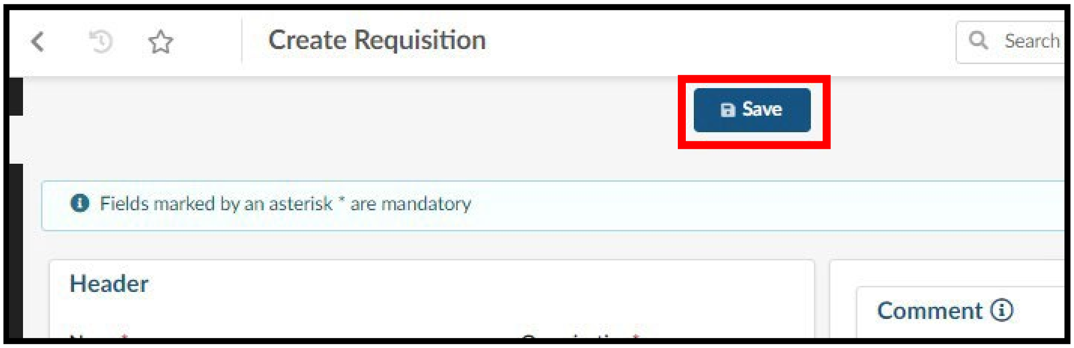
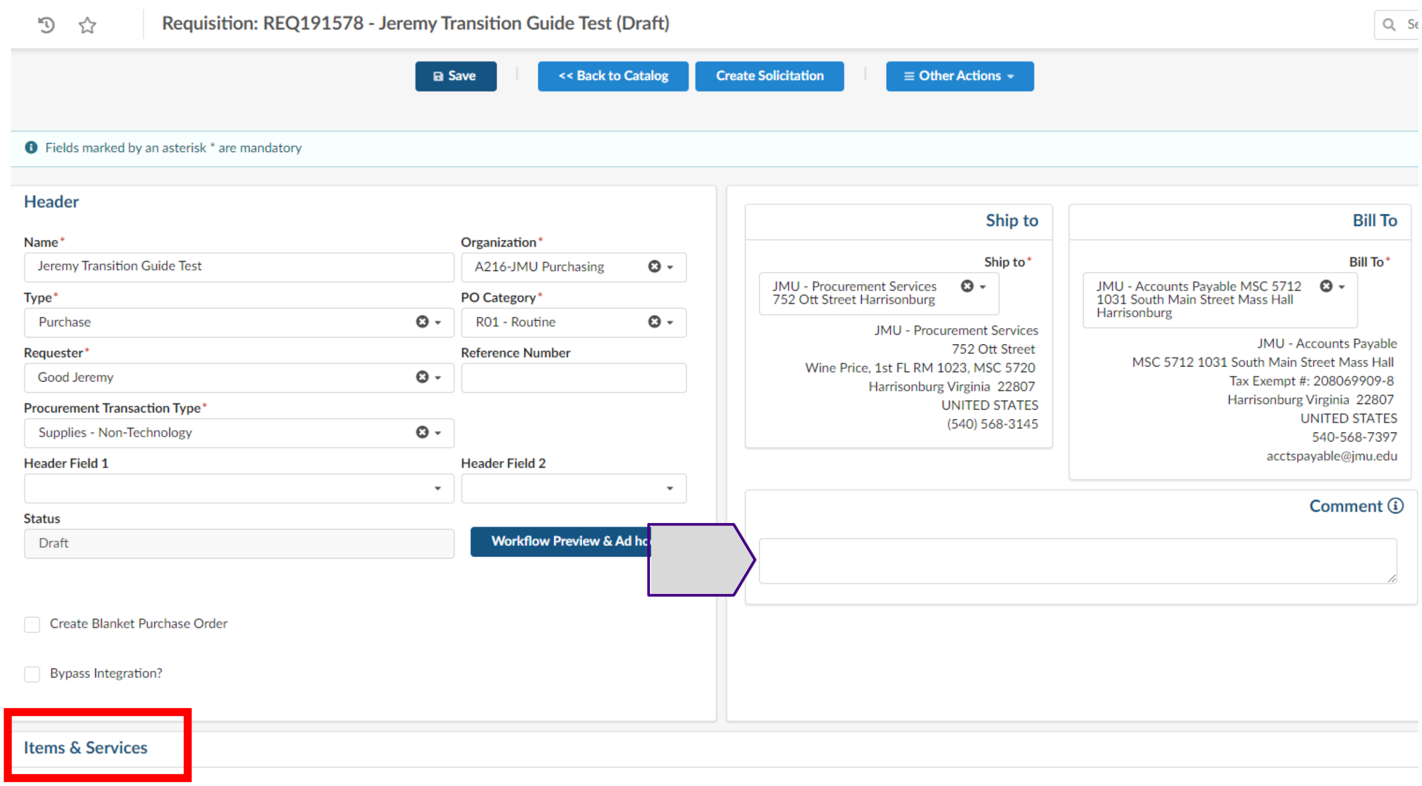
6. Select the dropdown arrow for **Procurement Transaction Type,** and click on the appropriate selection



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

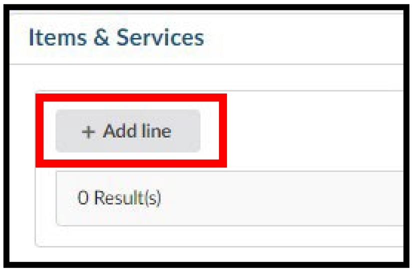


8. After clicking Save, your page will refresh and you will see additional options on the Requisition
   - Notice the Status will now be in (Draft)
   - You can now add Items & Services (*Formerly Line Items*)

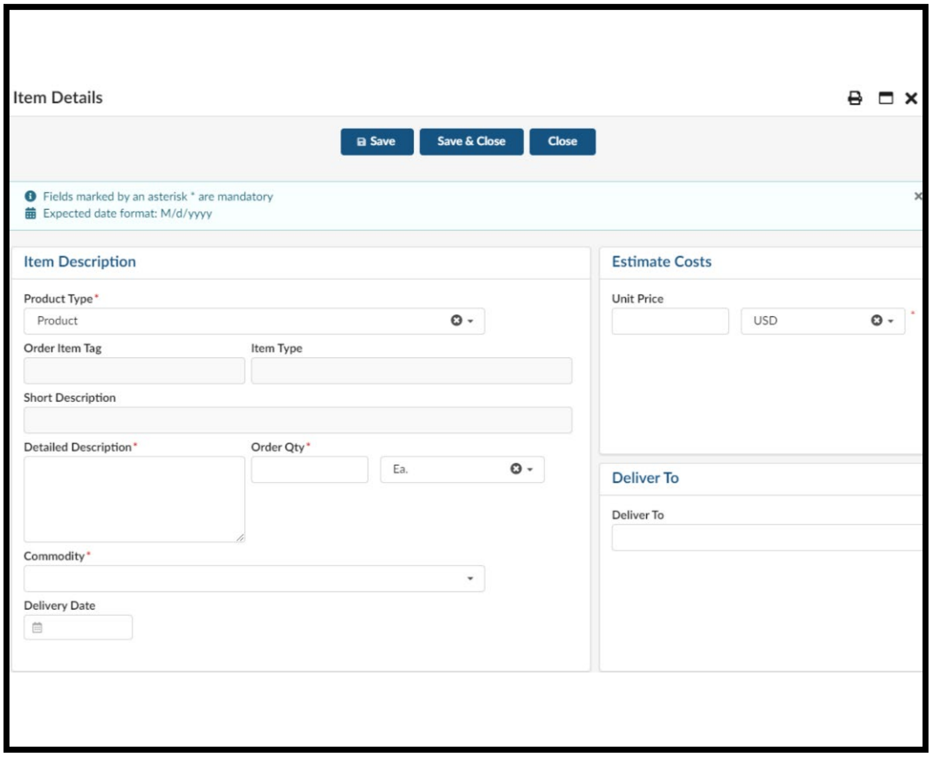


Note A: The Comment field to the right of the Header can be used to add comments to the requisition that will be **visible to suppliers and to eVA users.** At this time, you can no longer select/deselect the "visible to supplier" option to make comments internal or external. There is an internal only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

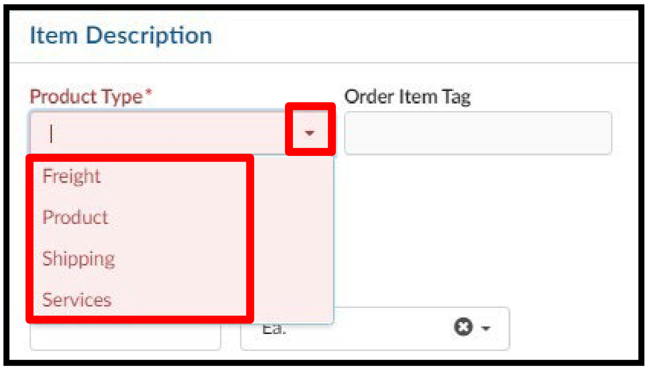
9. Under Items & Services, click **+Add line**



10. The Item Details pop-up window will display

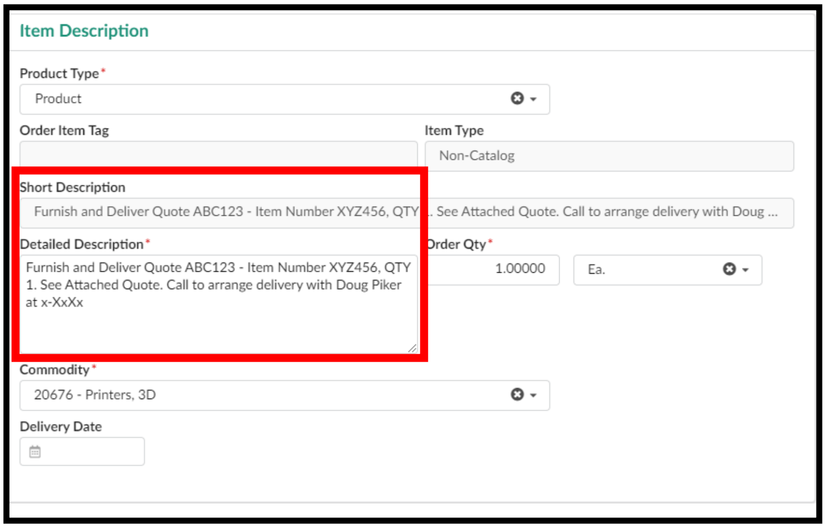


11. The **Product Type** will be defaulted to Product. If you need to change, select the dropdown arrow for **Product Type** and click on the appropriate selection

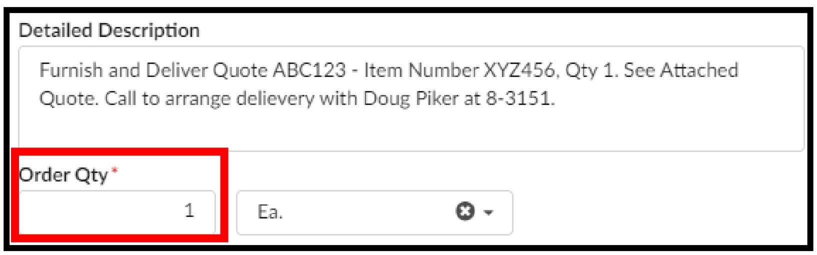


12. In the **Detailed Description** field, enter a description of the good/service purchased
    - Note that as you type, the field does not expand so you will not be able to see whole description/edit easily. This field only holds 192 characters.

13. The **Short Description** field is a fixed field currently that will duplicate what you have entered in the detailed description and is not editable.



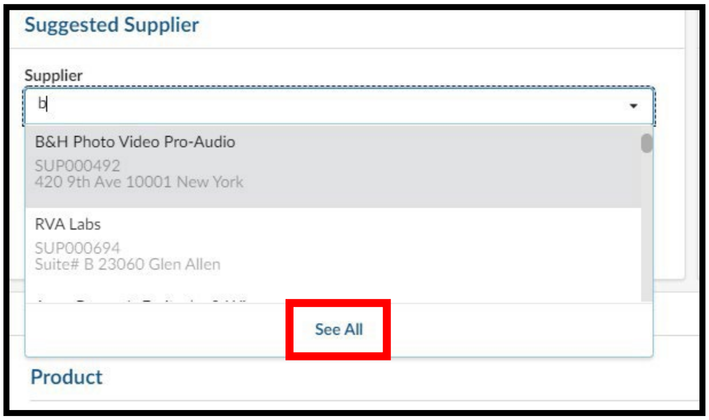
14. In the **Order Qty** field, enter the numerical quantity of the item(s) you purchased



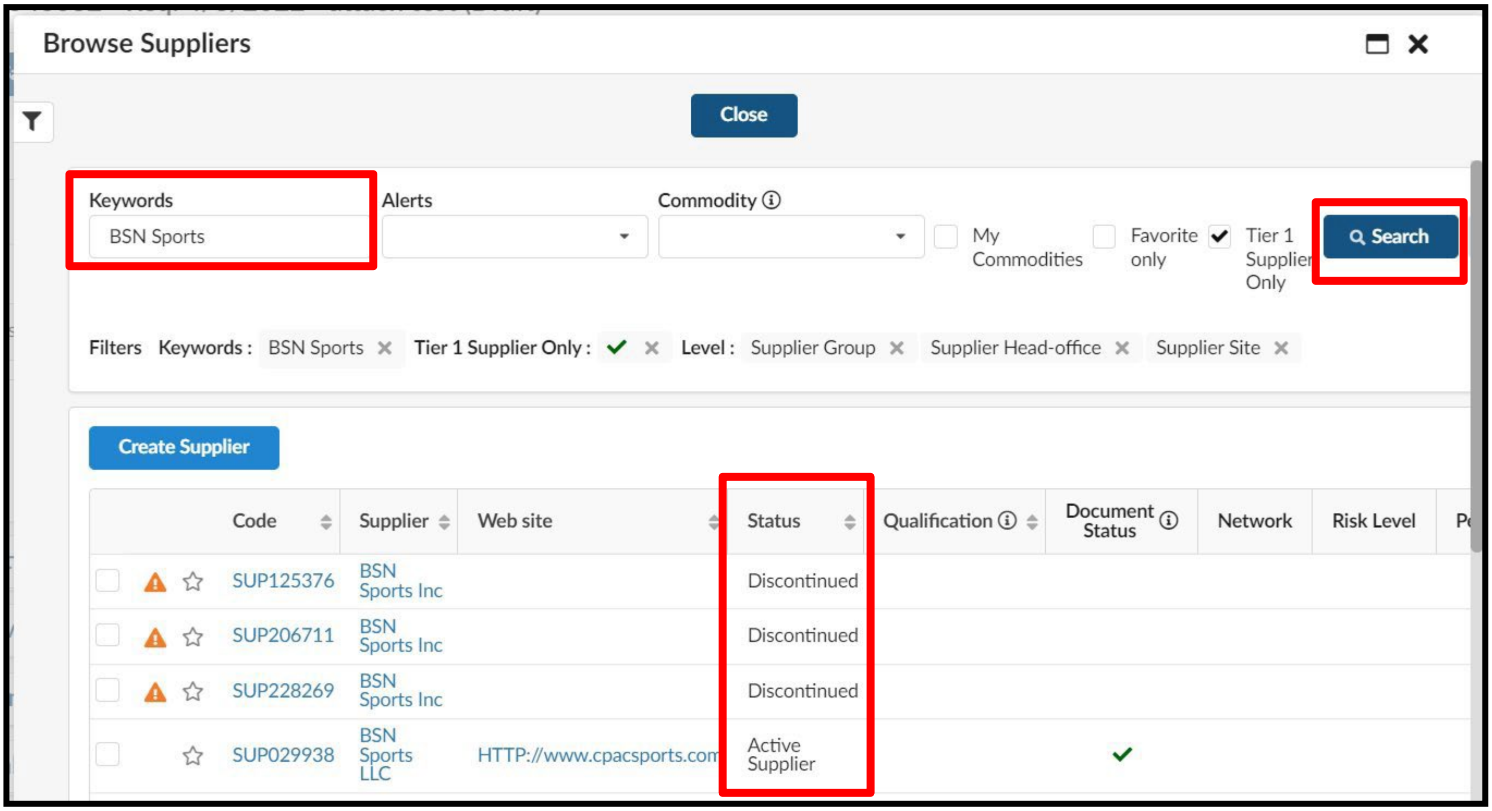
15. In the **Commodity** field, click in the field and begin typing the commodity name. The system will begin to populate available results that match. Once you find the best fitting commodity, click on the result in the listing to select it.

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

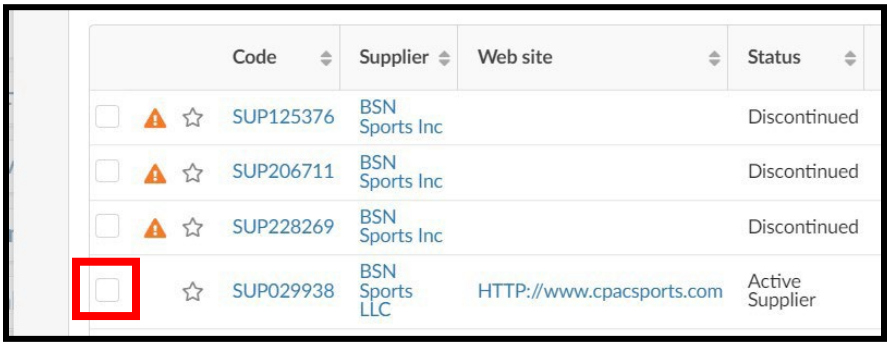
17. Under the Suggested Supplier area, click in the **Supplier** field and then click **See All**



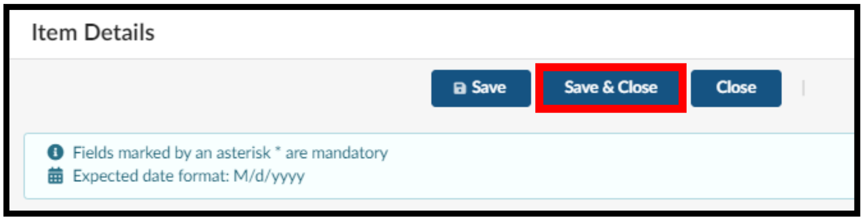
18. From the **Browse Suppliers** window, enter the supplier's name into the **Keywords** field, then click **Search**. The results will be listed below. Note the following:
    - This lists all supplier accounts, regardless of account status
    - If a supplier's **Status** is listed as Discontinued, 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.



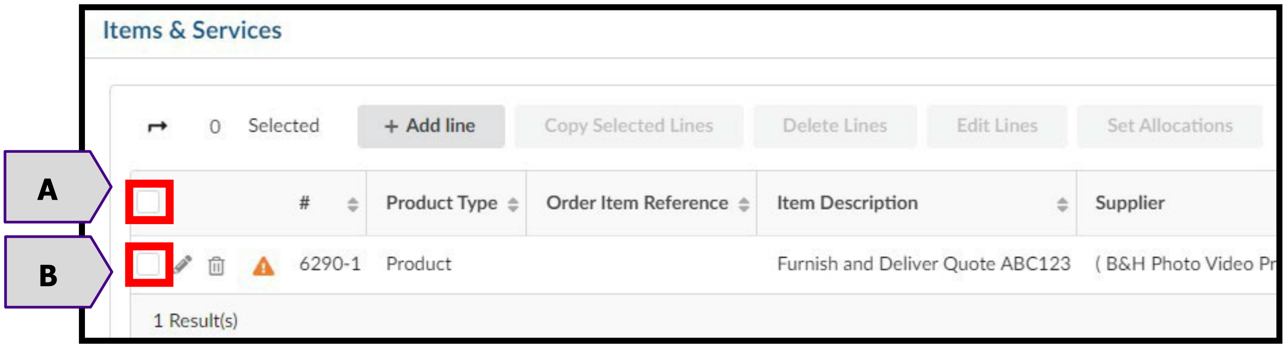
19. Once you have located the correct listing for the needed supplier, click the **small checkbox** to the left of the supplier's name. The Item Details page will then load. The Supplier and Fulfillment Supplier fields will populate from the selection.



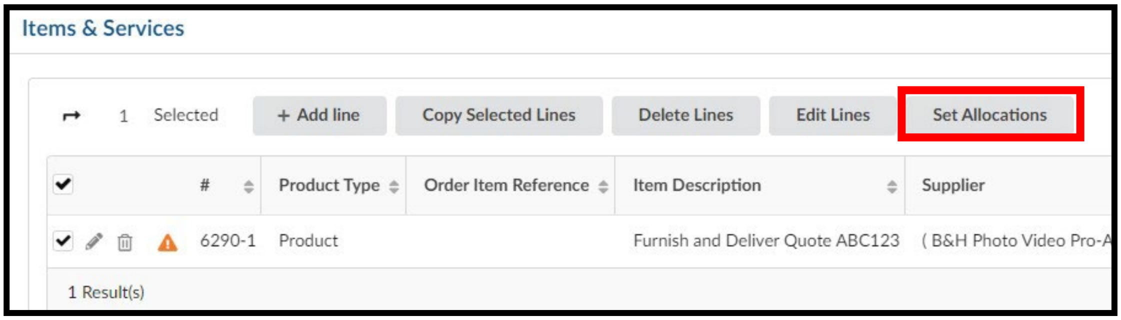
20. At the top of the Item Details window, click the **Save & Close** option



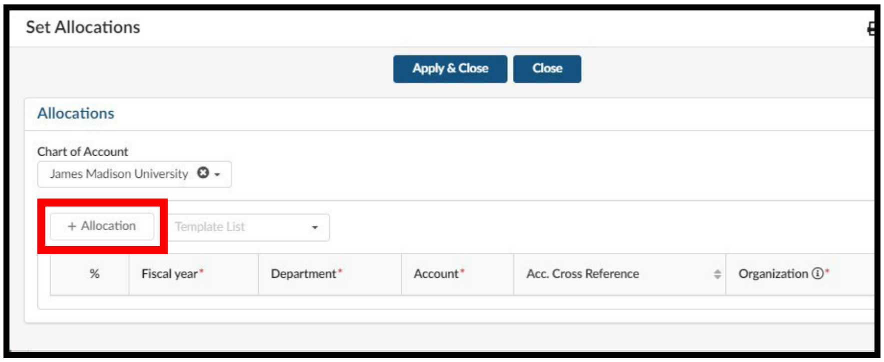
21. Under **Items & Services** click on the appropriate checkbox
    - A: This checkbox is used to select all line items. Use this when you want to set all line items to the same Department code and Account code.
    - B: This checkbox is used to select individual lines. Use this when you need to set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



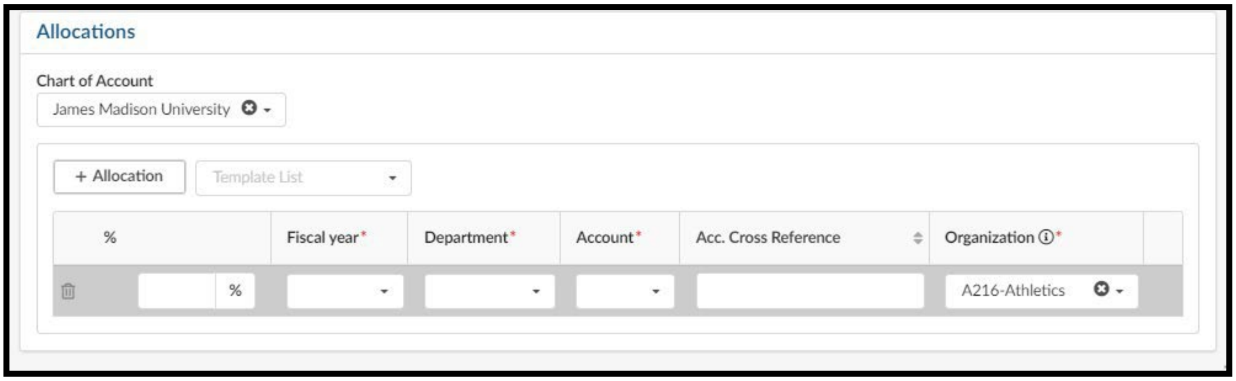
22. Click **Set Allocations** (*Formerly Accounting*)



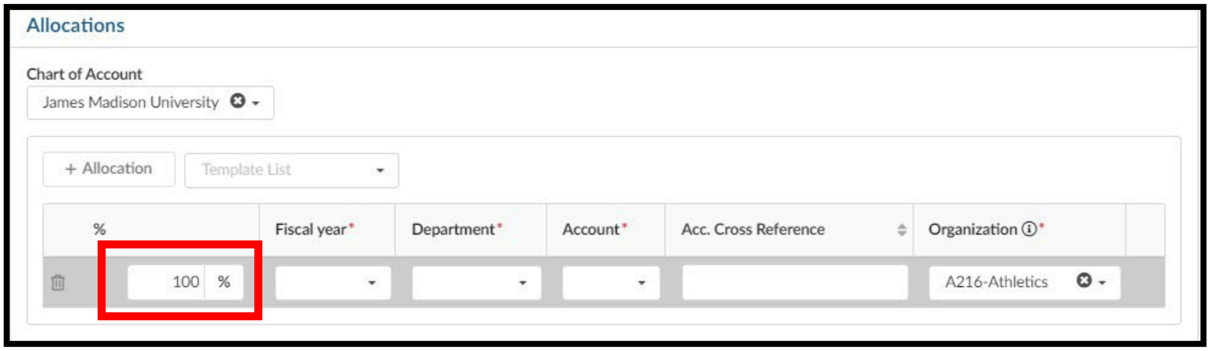
23. The Set Allocations window will display, click **+ Allocation**



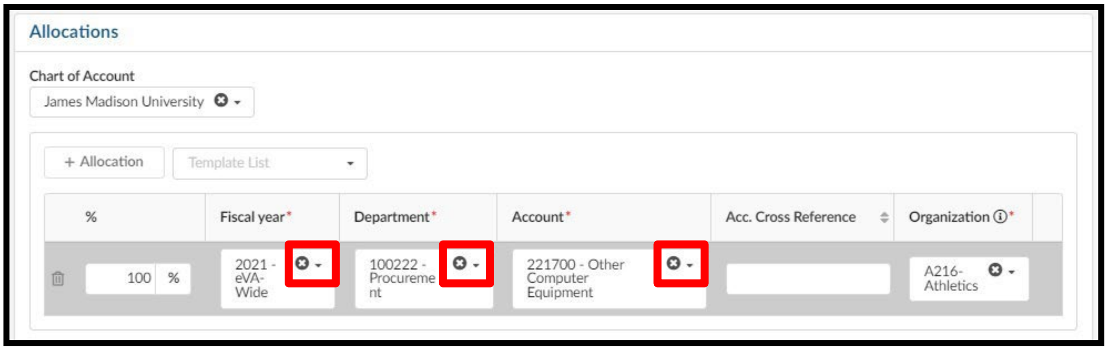
24. A new row will display allowing you to enter required allocation information.



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.

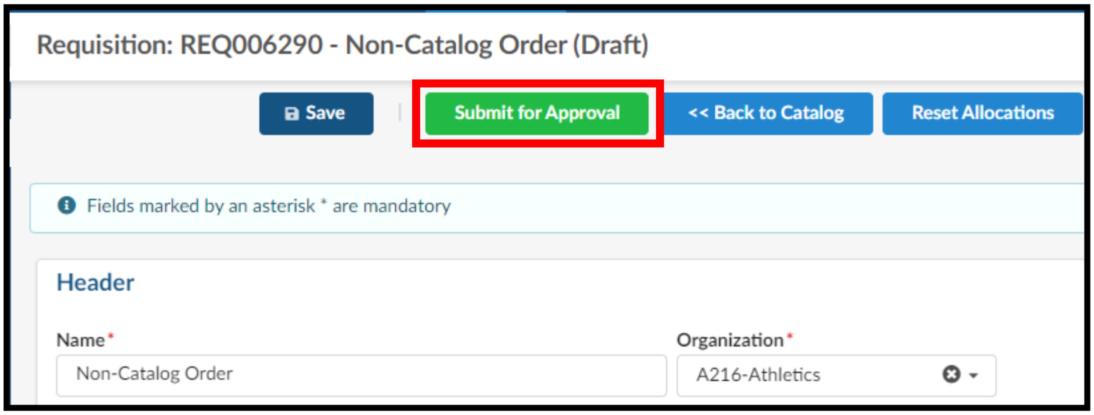


26. You will now complete the other required allocation fields.
    - Select the dropdown arrow for **Fiscal year** and click on the appropriate selection
    - Select the dropdown arrow for **Department** and click in the field and begin typing the department name or department number. The system will 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.



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

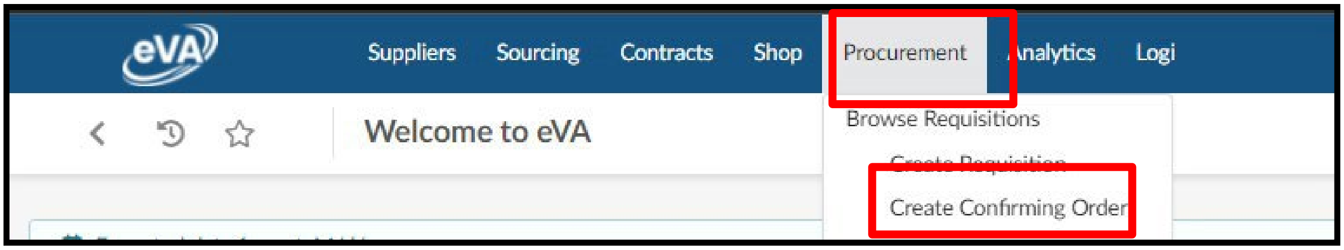
28. You can now submit the requisition. At the top of the page, click **Submit for Approval**
    - If the requisition is not within your expenditure authority, your approver will need to approve it.
    - In some situations, bases on the items purchased or the dollar amount, the requisition may require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



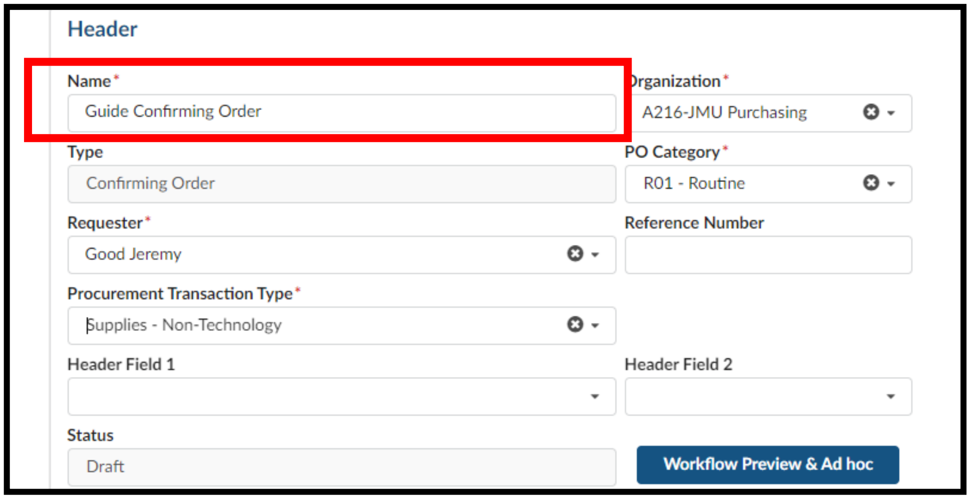
Creating a Confirming Order

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

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

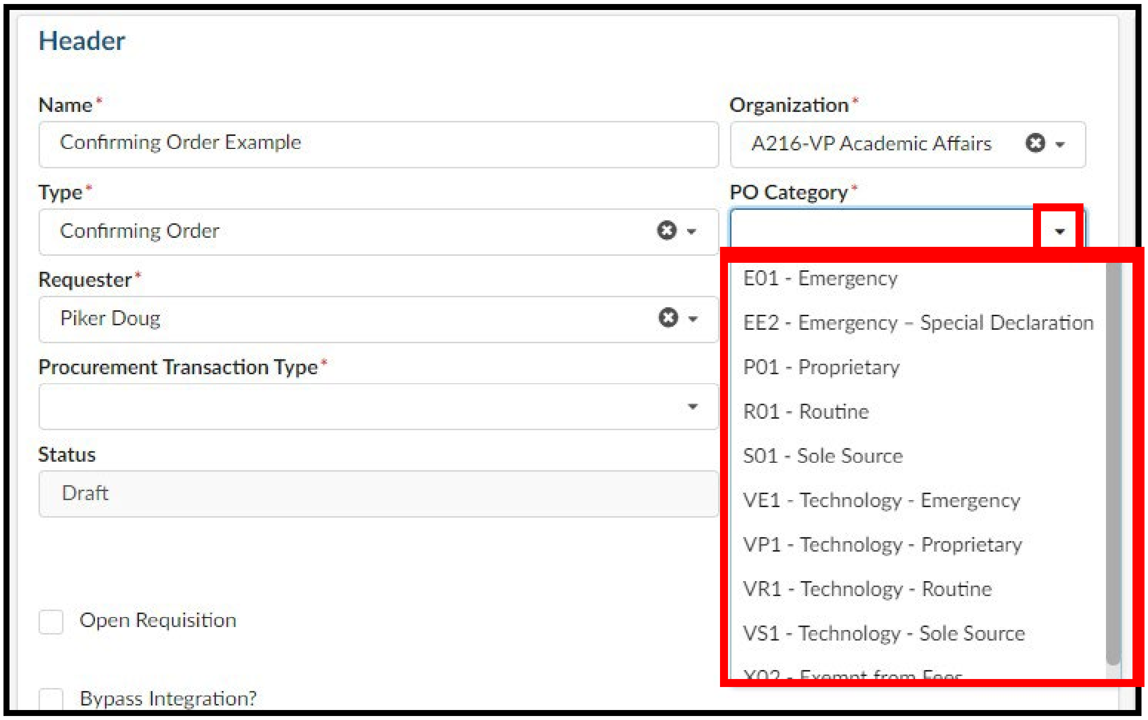


2. Fill in the **Name** field (*this was previously the title field*)



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

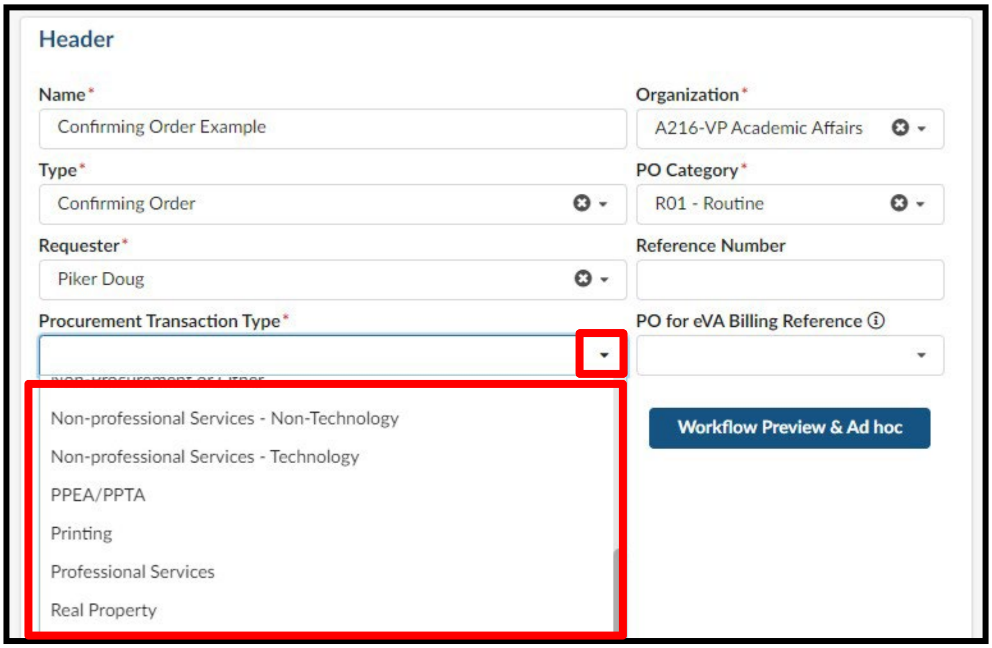
4. Select the dropdown arrow for **PO Category**, and click on the appropriate selection



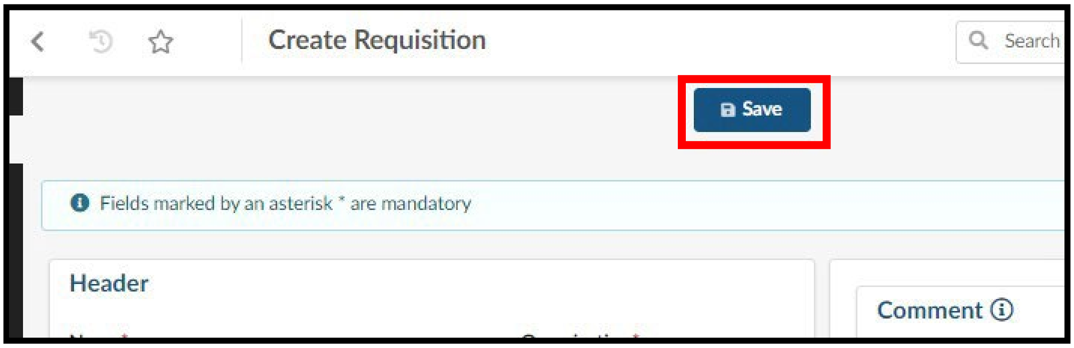
PO Category Refresher:

- 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.

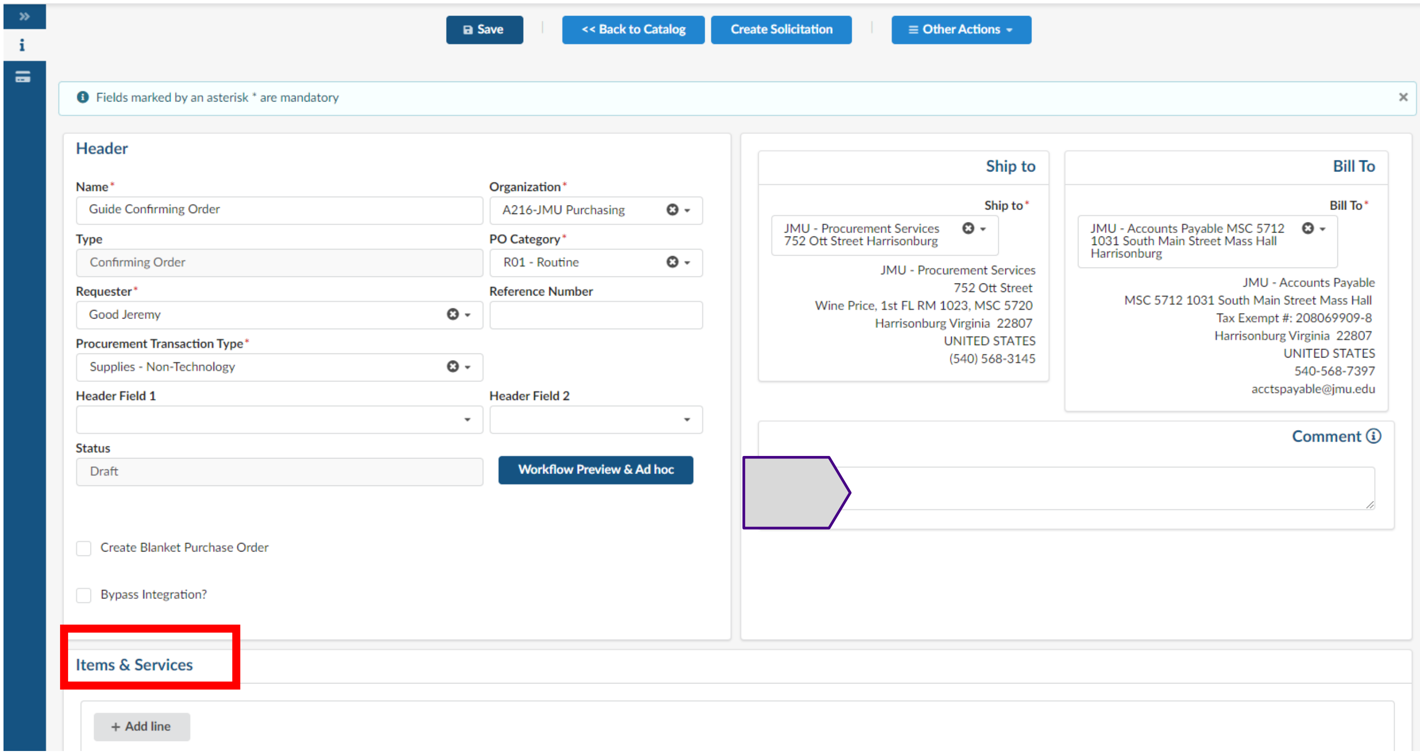
5. Select the dropdown arrow for **Procurement Transaction Type,** and click on the appropriate selection



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

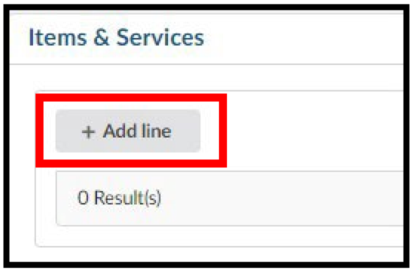


7. After clicking Save, your page will refresh and you will see additional options on the Requisition
   - Notice the Status will now be in (Draft)
   - You can now add Items & Services (*Formerly Line Items*)

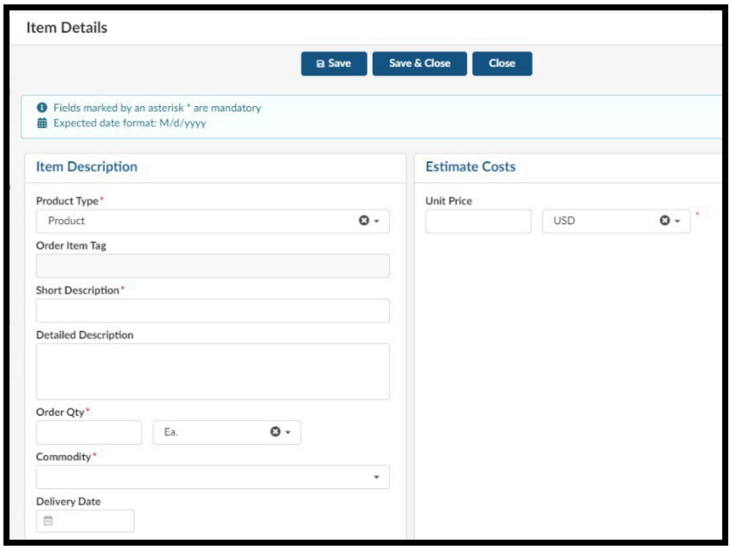


Note A: The Comment field to the right of the Header can be used to add comments to the requisition that will be **visible to suppliers and to eVA users.** At this time, you can no longer select/deselect the "visible to supplier" option to make comments internal or external. There is an internal only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

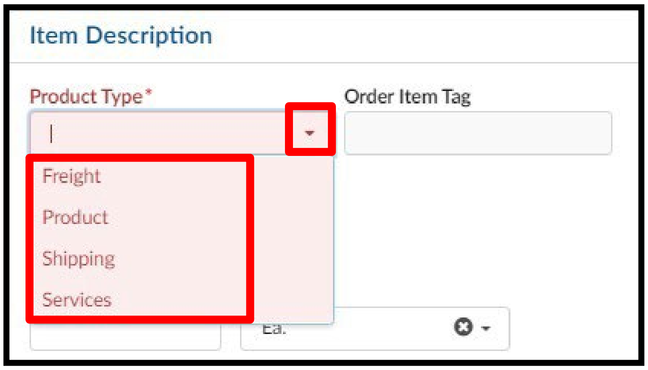
8. Under Items & Services, click **+Add line**



9. The Item Details pop-up window will display

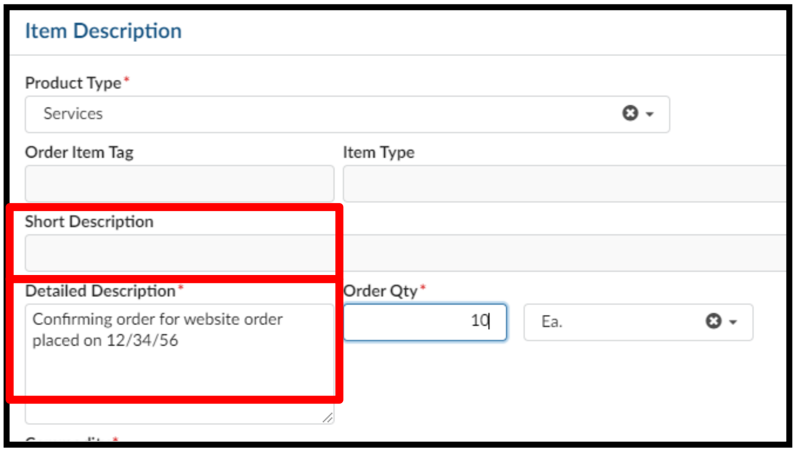


10. Select the dropdown arrow for **Product Type** and click on the appropriate selection

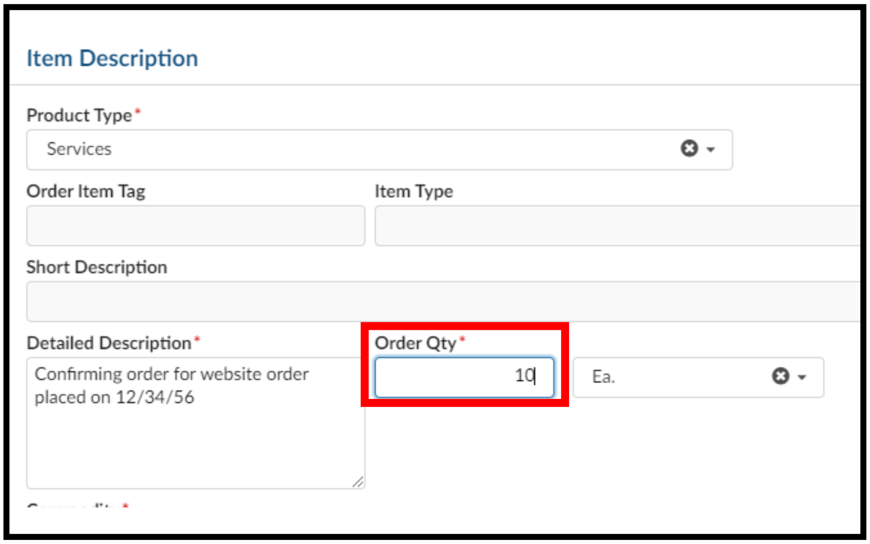


11. In the **Short Description** field, enter a short description of the good/service purchased
    - Note that as you type, the field does not expand so you will not be able to see whole description/edit easily. This field only holds 192 characters. For longer descriptions, see step 13.
    - Please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

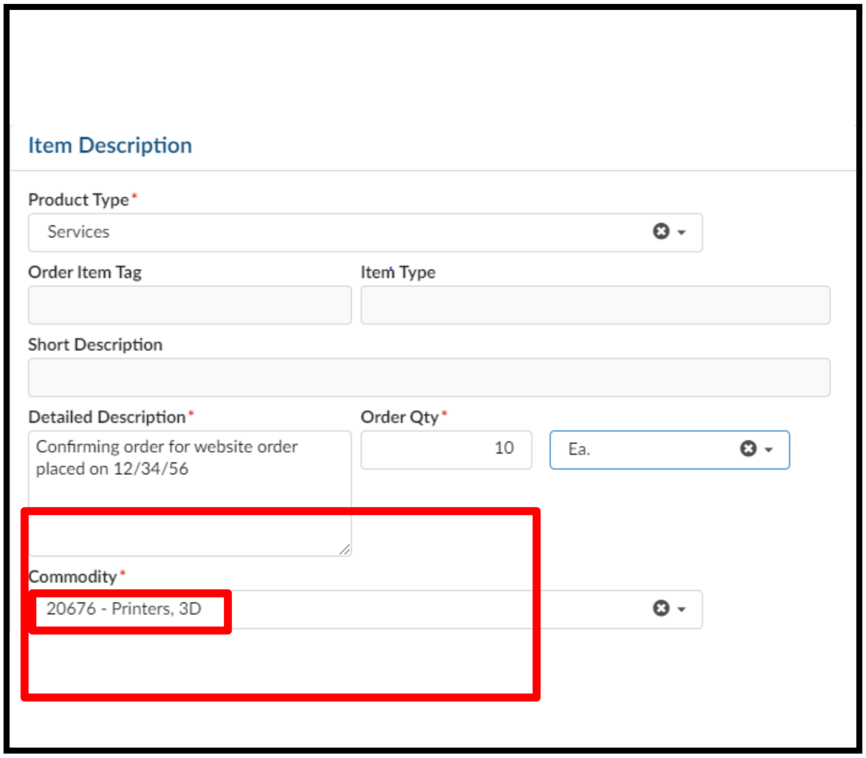
12. The **Detailed Description** field is a paragraph entry text box that can hold multiple lines of text



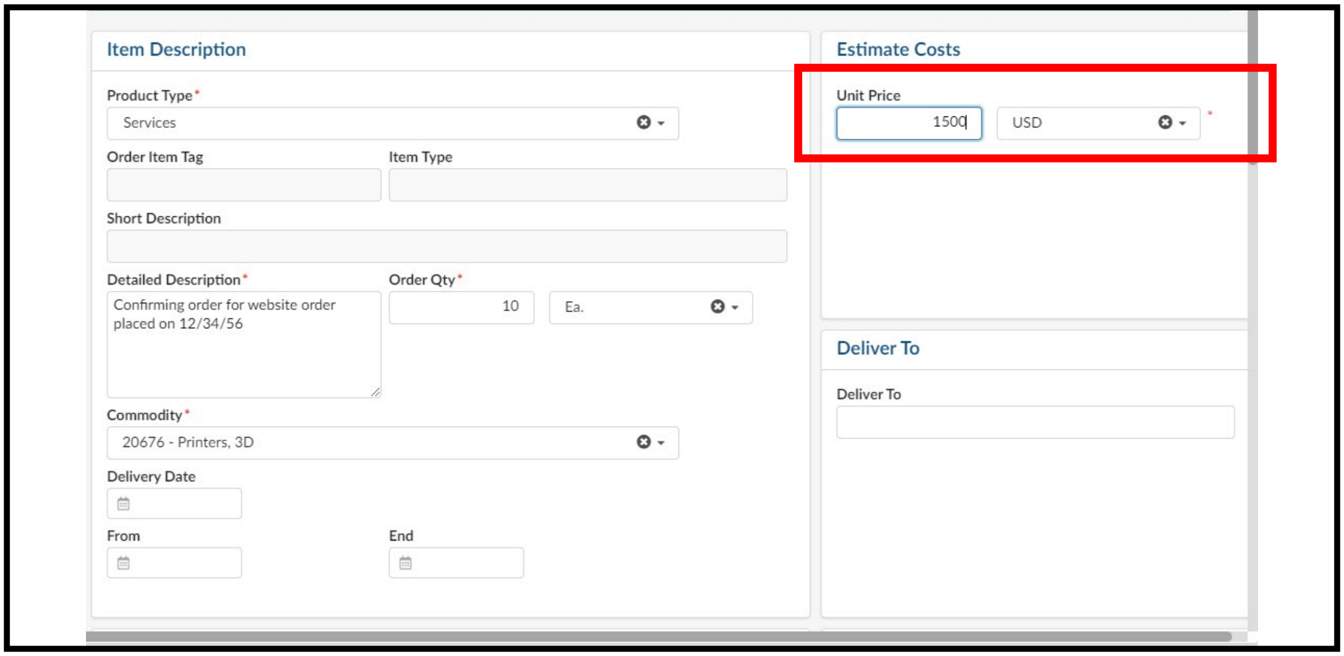
13. In the **Order Qty** field, enter the numerical quantity of the number of items you purchased. **The quantity in the screenshot is just an example.**



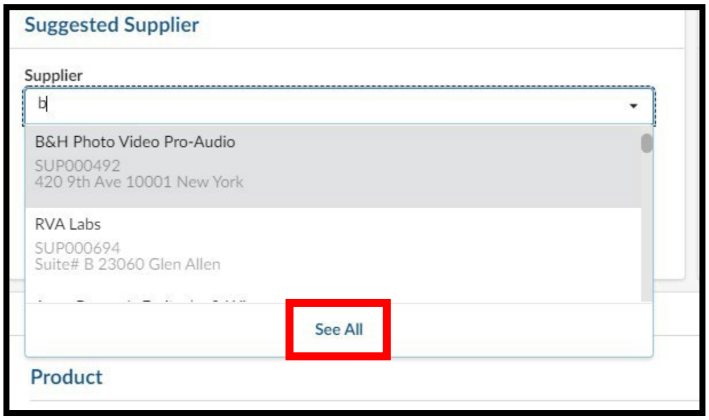
14. In the **Commodity** field, click in the field and begin typing the commodity name. The system will begin to populate available results that match. Once you find the best fitting commodity, click on the result in the listing to select it.



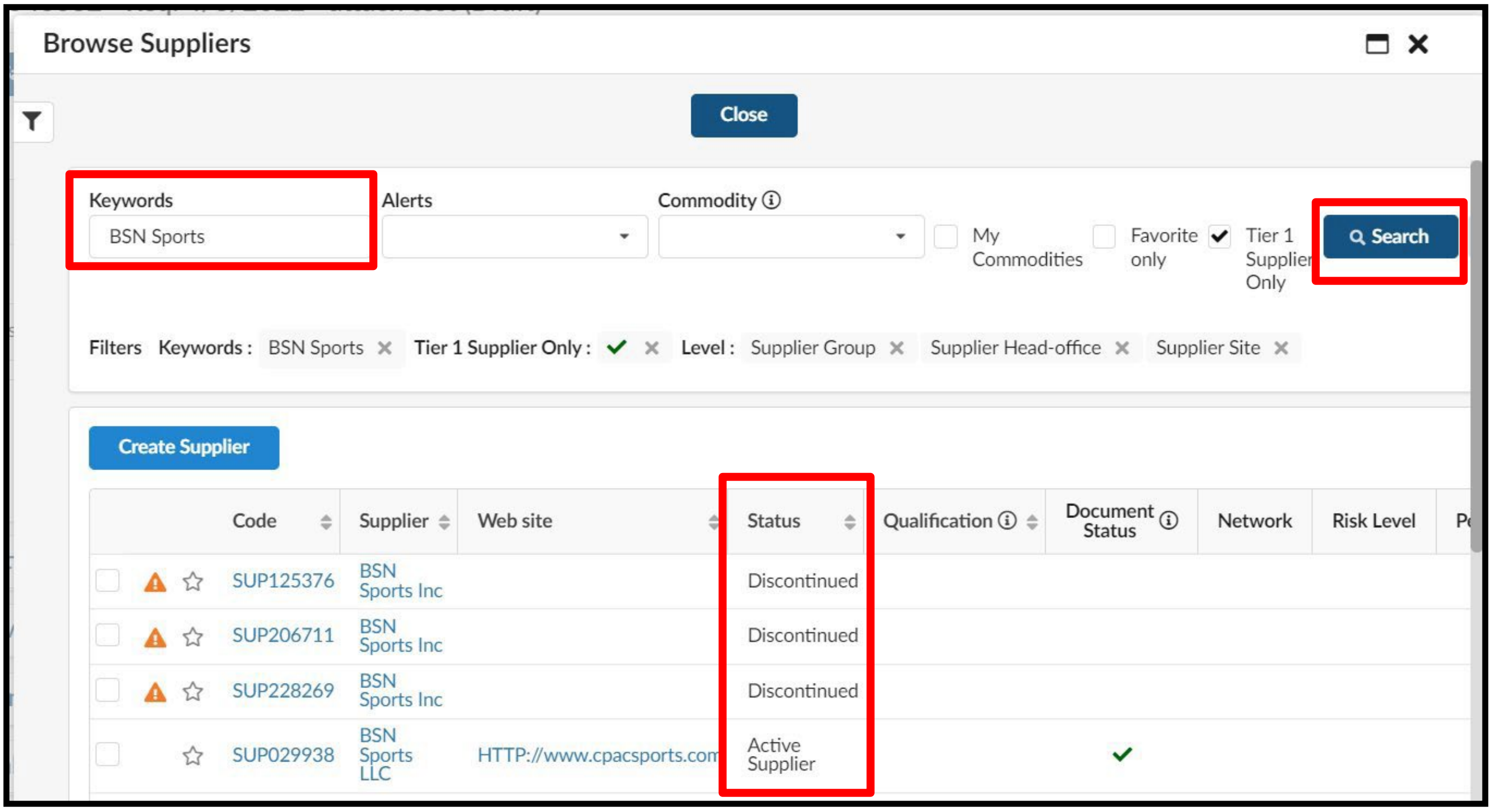
15. In the **Unit Price** field, enter the exact cost of the line item (*disregard that it is titled "Estimate Costs"*)



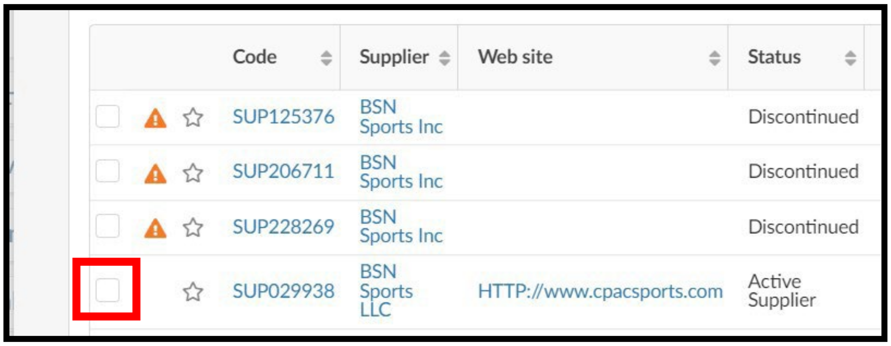
16. Under the Suggested Supplier area, click in the **Supplier** field and then click **See All**



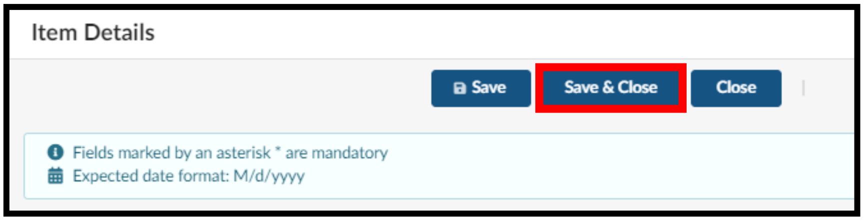
17. From the **Browse Suppliers** window, enter the supplier's name into the **Keywords** field, then click **Search**. The results will be listed below. Note the following:
    - This lists all supplier accounts, regardless of account status
    - If a supplier's **Status** is listed as Discontinued, they <u>cannot</u> 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.



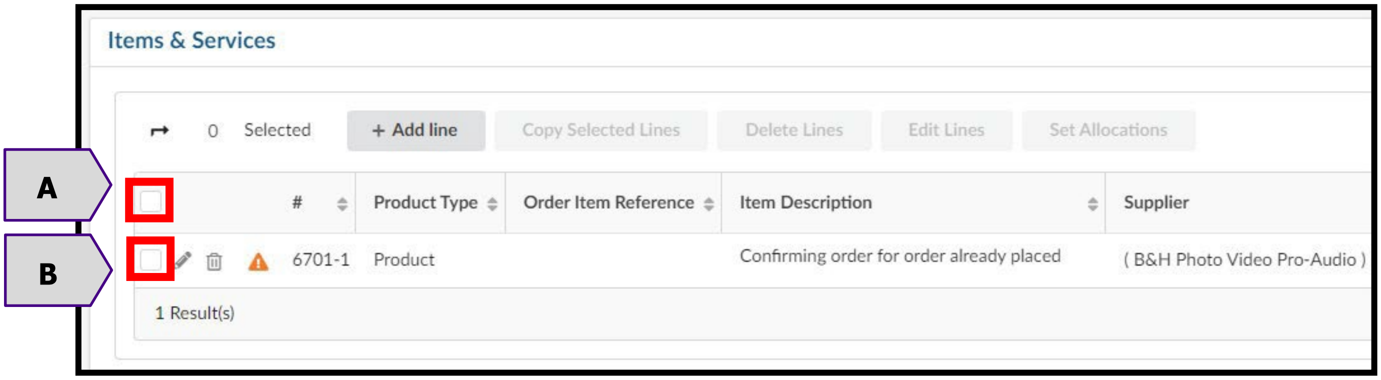
18. Once you have located the correct listing for the needed supplier, click the **small checkbox** to the left of the supplier's name. The Item Details page will then load. The Supplier and Fulfillment Supplier fields will populate from the selection.



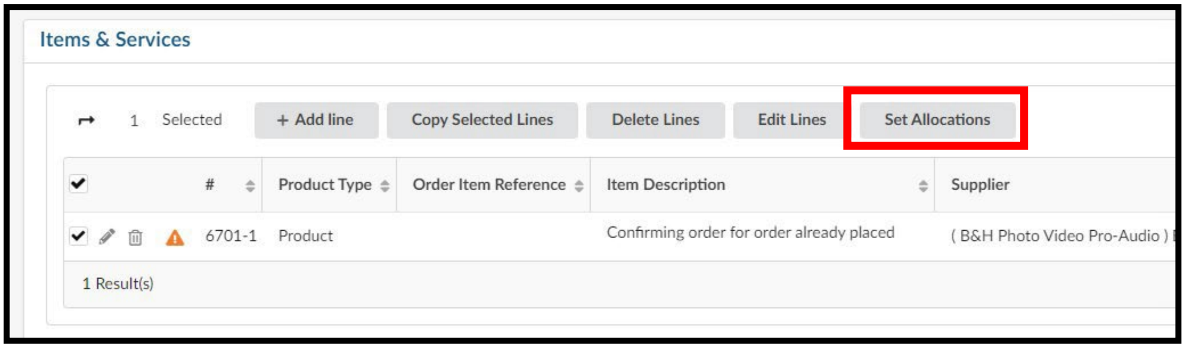
19. At the top of the Item Details window, click the **Save & Close** option



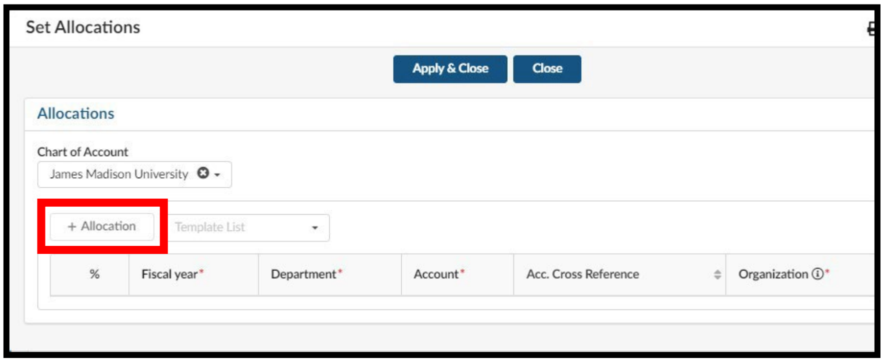
20. Under **Items & Services** click on the appropriate checkbox
    - A: This checkbox is used to select all line items. Use this when you want to set all line items to the same Department code and Account code.
    - B: This checkbox is used to select individual lines. Use this when you need to set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



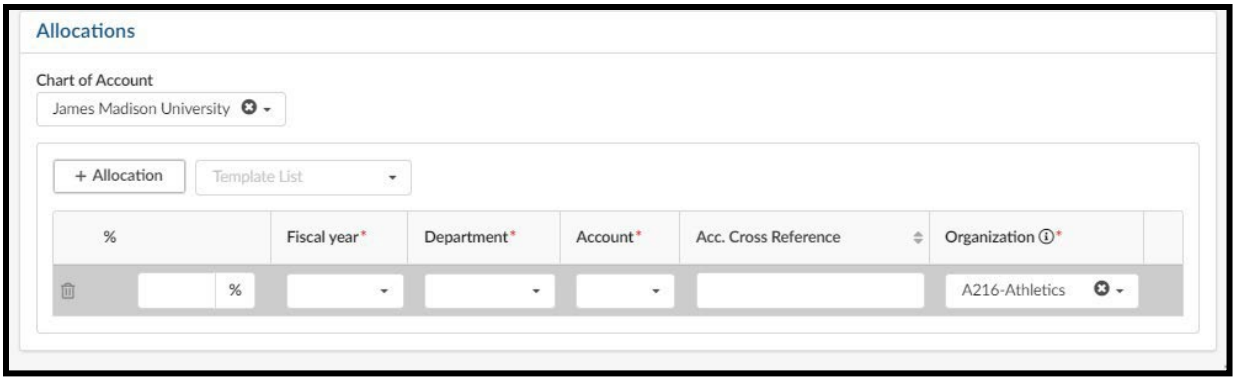
21. Click **Set Allocations** (*Formerly Accounting*)



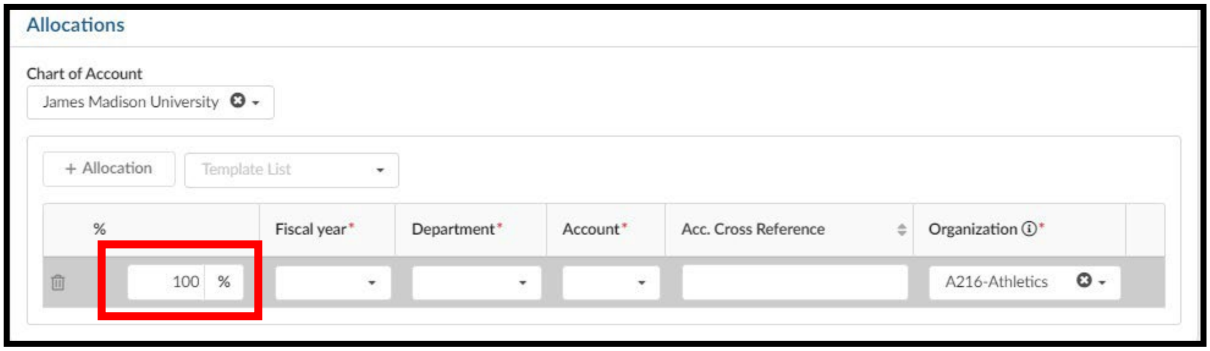
22. The Set Allocations window will display, click **+ Allocation**



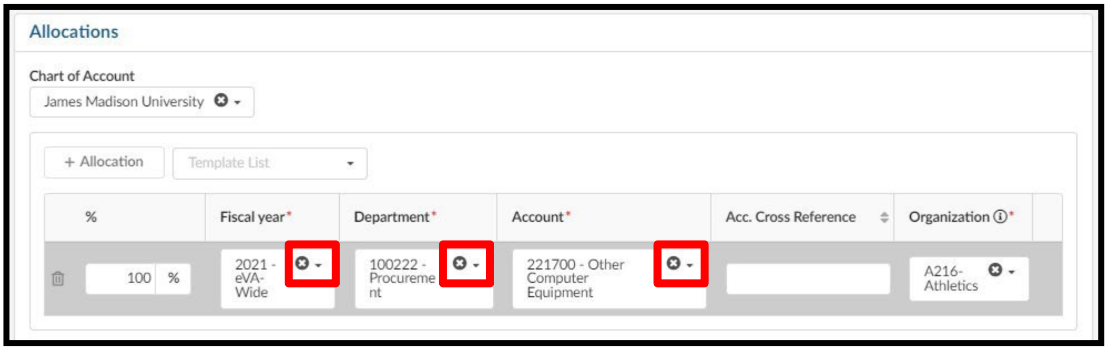
23. A new row will display allowing you to enter required allocation information.



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.

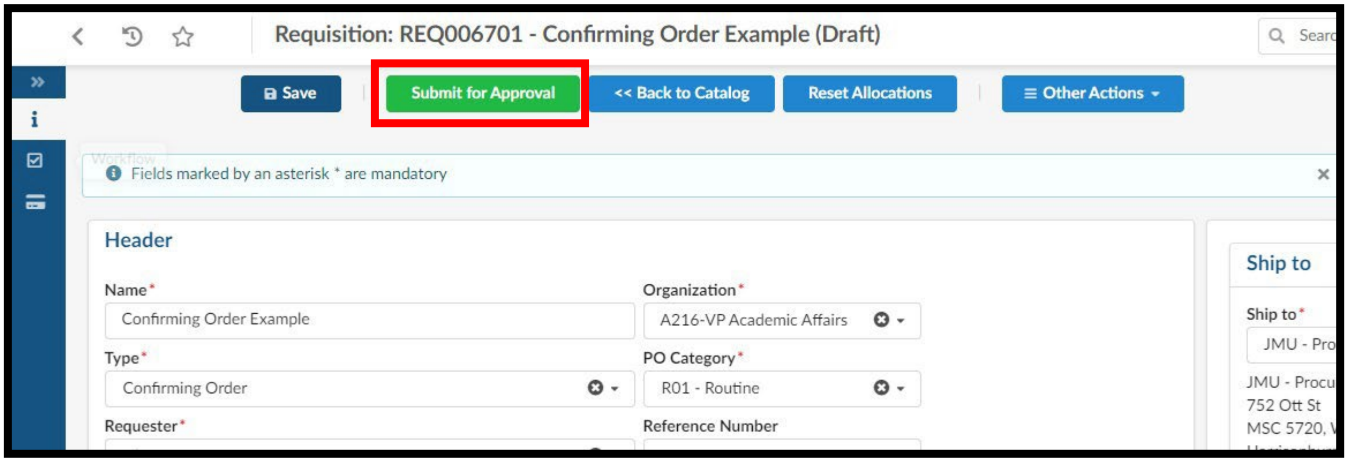


25. You will now complete the other required allocation fields.
    - Select the dropdown arrow for **Fiscal year** and click on the appropriate selection
    - Select the dropdown arrow for **Department** and click in the field and begin typing the department name or department number. The system will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



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

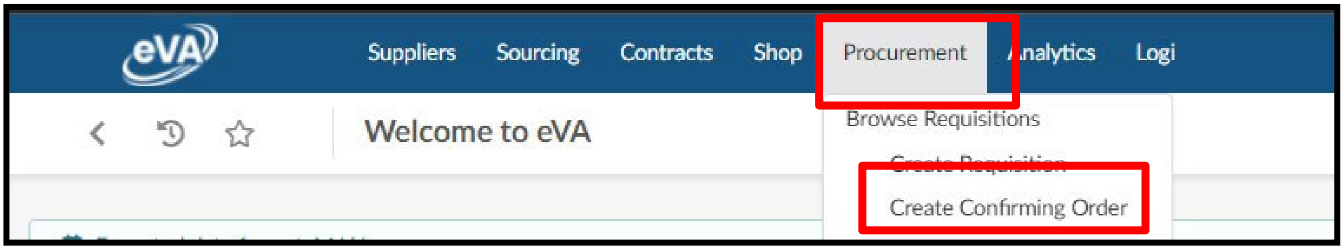
27. You can now submit the requisition. At the top of the page, click **Submit for Approval**
    - If the requisition is not within your expenditure authority, your approver will need to approve it.
    - In some situations, bases on the items purchased or the dollar amount, the requisition may require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



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

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

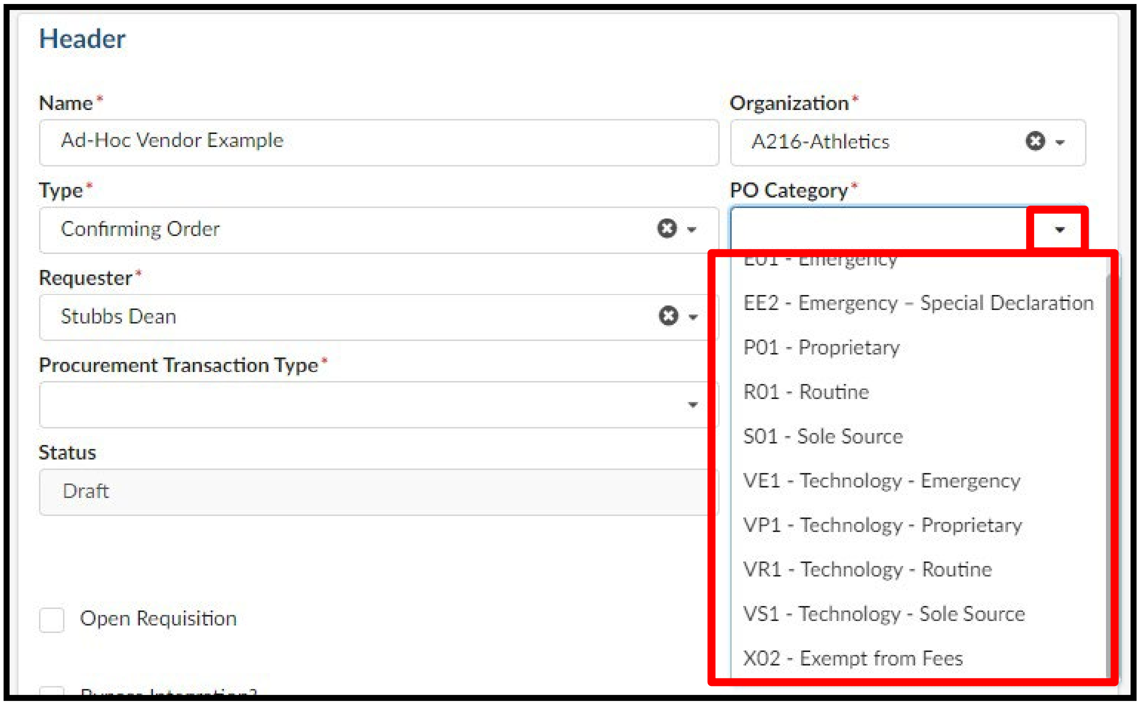
1. Click **Procurement** and then in the dropdown menu, click **Create Confirming Order**



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

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

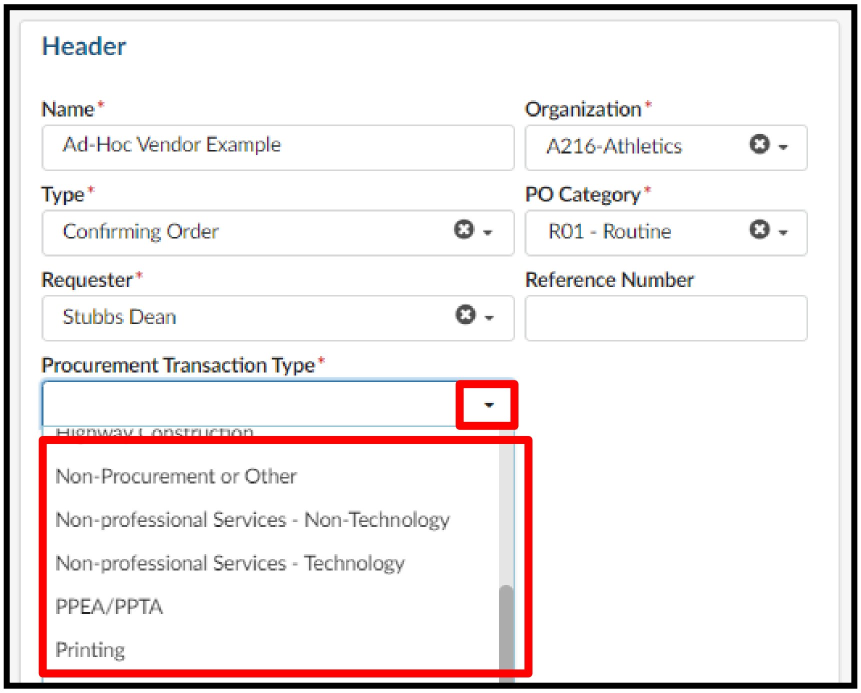
4. Select the dropdown arrow for **PO Category**, and click on the appropriate selection



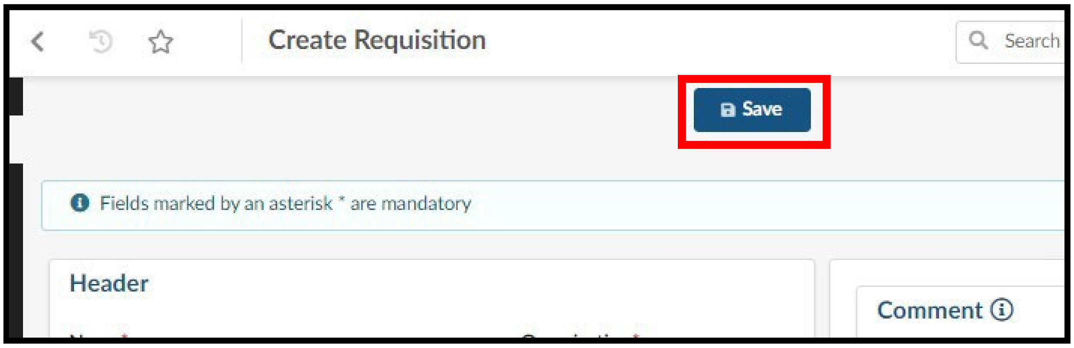
PO Category Refresher:

- 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.

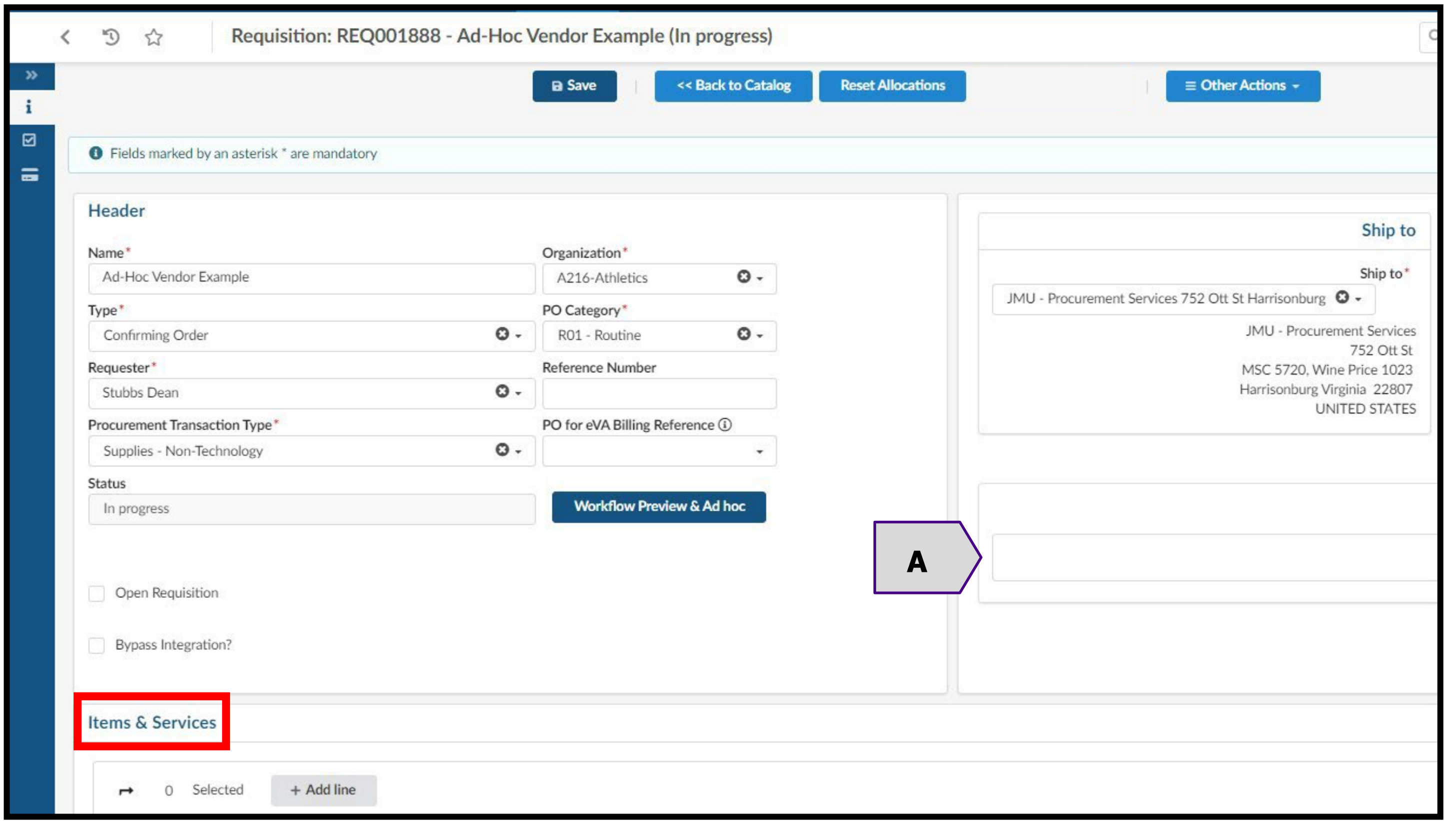
5. Select the dropdown arrow for **Procurement Transaction Type,** and click on the appropriate selection



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

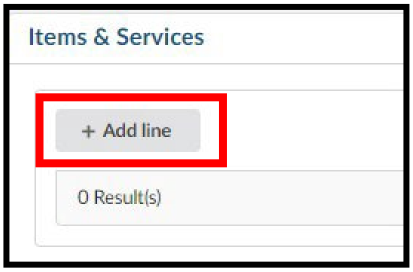


7. After clicking Save, your page will refresh and you will see additional options on the Requisition
   - Notice the Status will now be in (Draft)
   - You can now add Items & Services (*Formerly Line Items*)

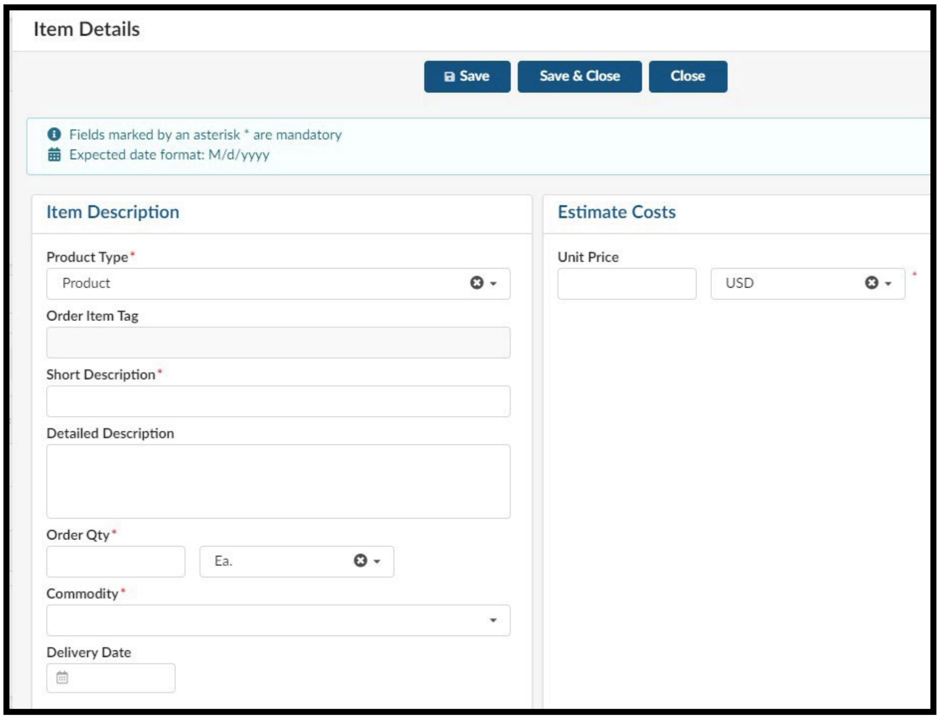


Note A: The Comment field to the right of the Header can be used to add comments to the requisition that will be **visible to suppliers and to eVA users.** At this time, you can no longer select/deselect the "visible to supplier" option to make comments internal or external. There is an internal only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

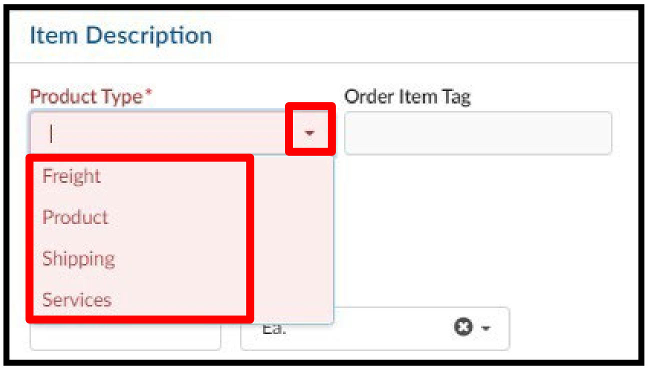
8. Under Items & Services, click **+Add line**



9. The Item Details pop-up window will display

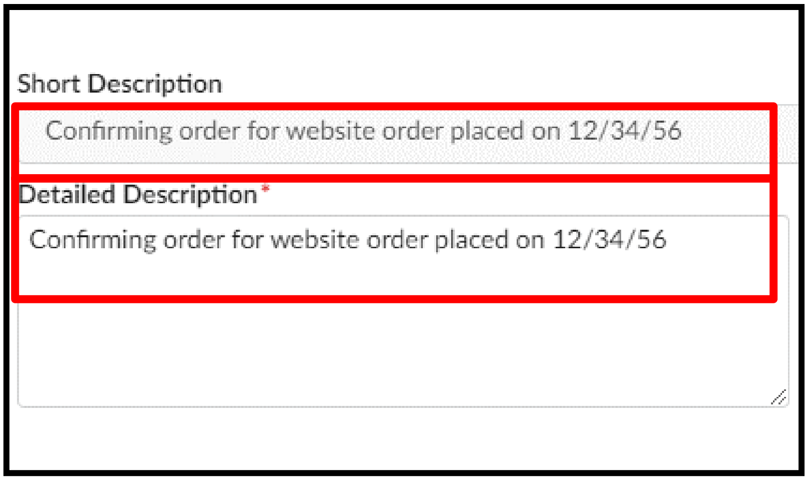


10. Select the dropdown arrow for **Product Type** and click on the appropriate selection

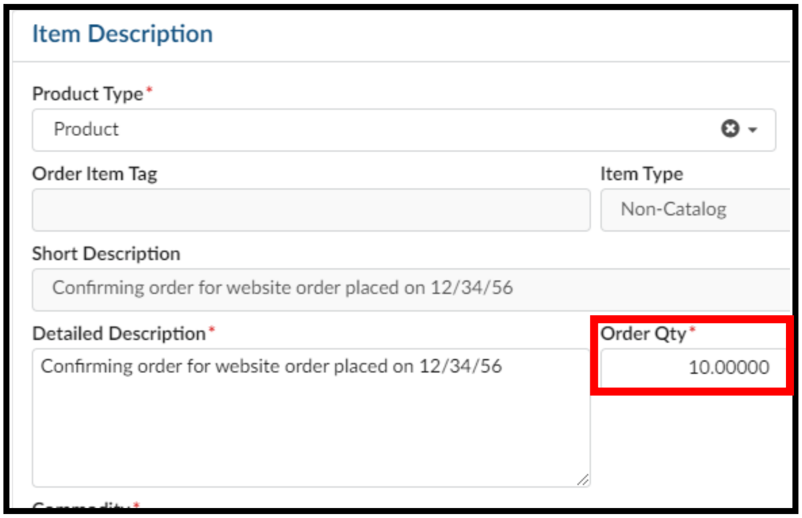


11. In the **Short Description** field, you currently can not enter a description. This will copy the information entered into the Detailed Description.

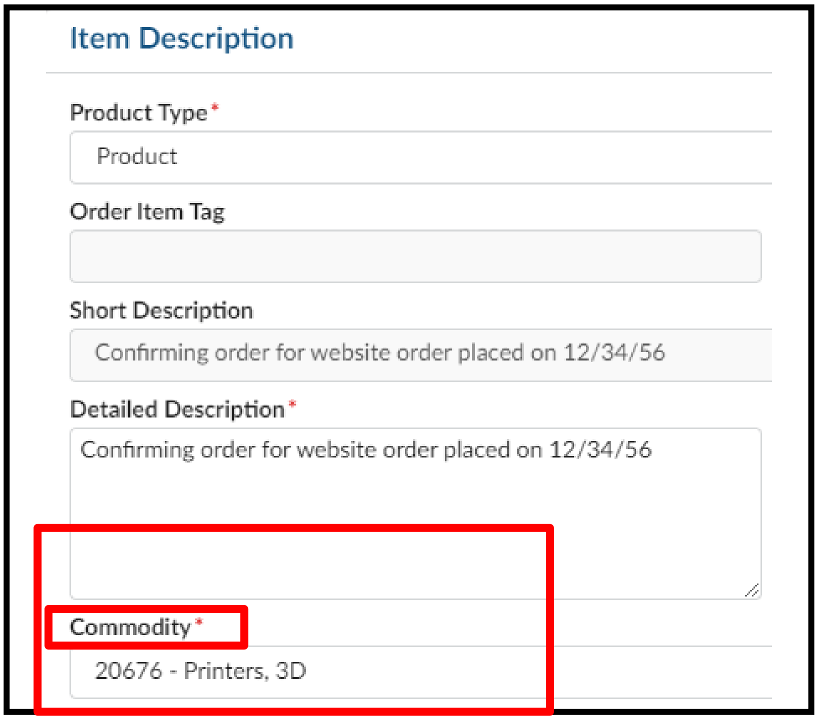
12. The **Detailed Description** field is a paragraph entry text box that can hold multiple lines of text
    - Please note that the Detailed Description field is mandatory, you must enter something.



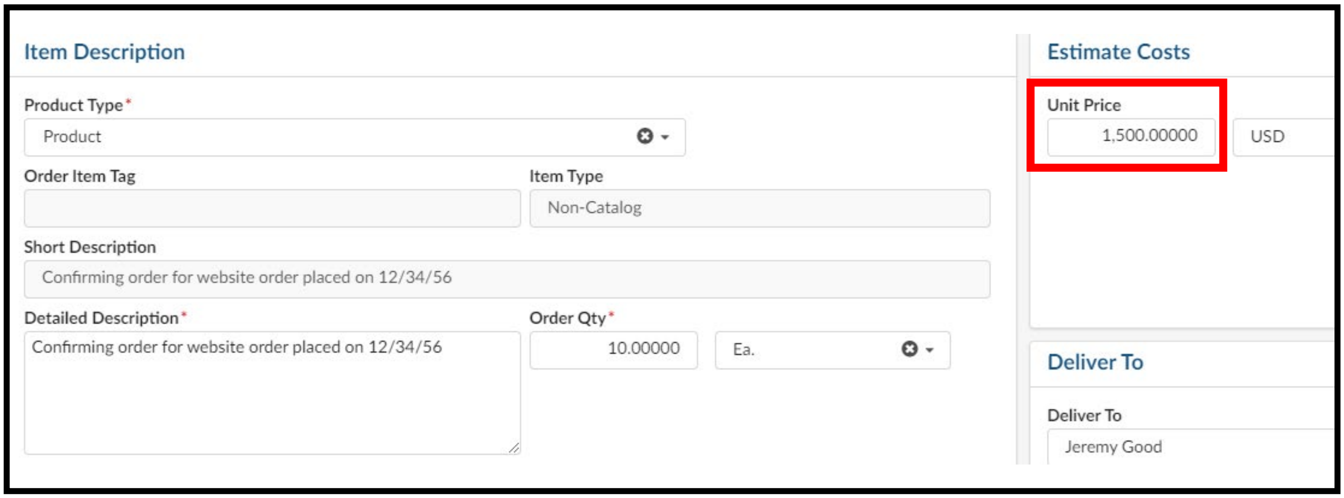
13. In the **Order Qty** field, enter the numerical quantity of the item(s) you purchased. **The quantity used in the screenshot below is just an example, you should enter the quantity that is correct for your purchase.**



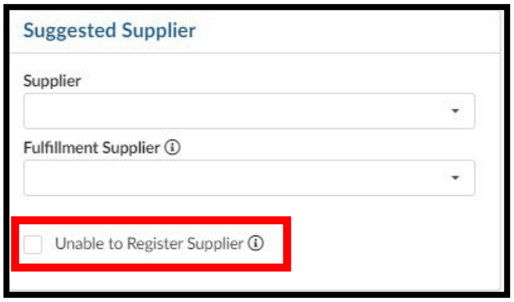
14. In the **Commodity** field, click in the field and begin typing the commodity name. The system will begin to populate available results that match. Once you find the best fitting commodity, click on the result in the listing to select it.



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

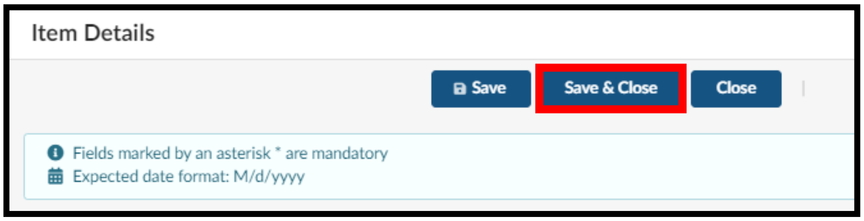


16. Under the Suggested Supplier, click the checkbox **Unable to Register Supplier**
    - Only check this after verifying that a supplier is not in eVA and you need to ad-hoc the supplier. See the Searching for Suppliers section for additional details on this process.
    - Users should work to source 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.

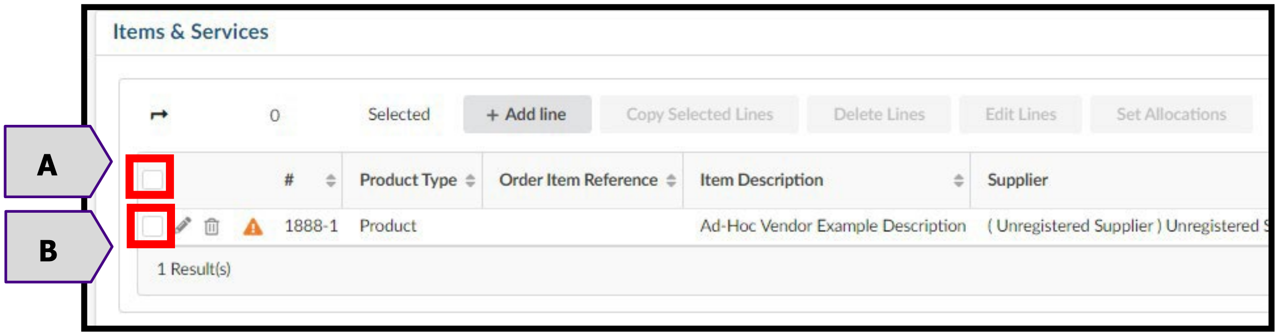


17. In the **Unregistered Supplier Name** field, enter the supplier's name
    - Please continue to submit any W-9's to Procurement via askeva@jmu.edu

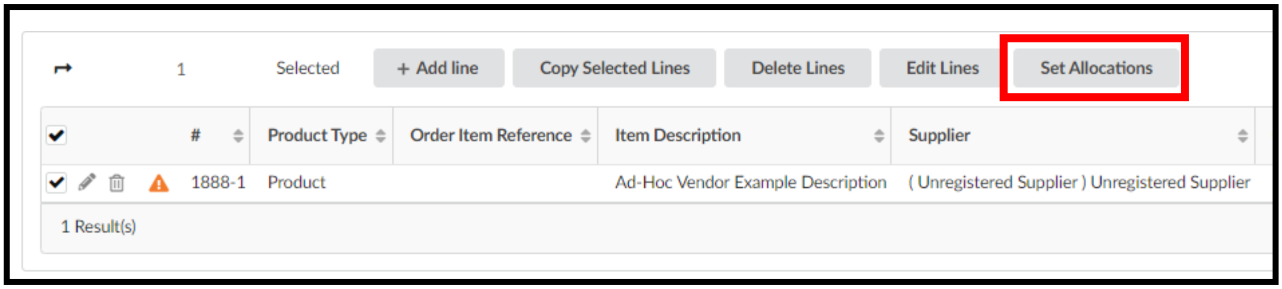
18. At the top of the Item Details window, click the **Save & Close** option



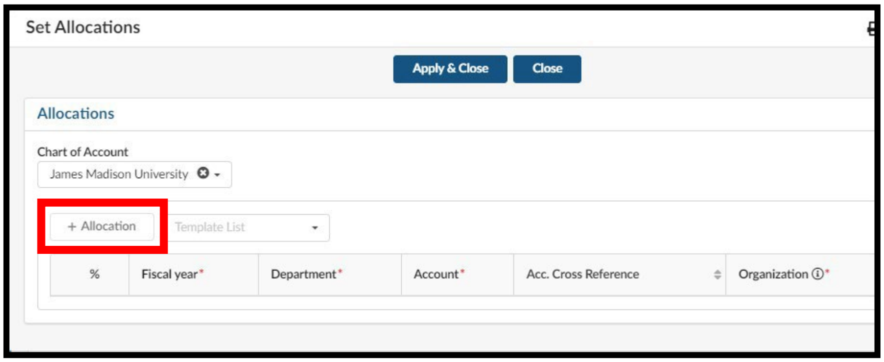
19. Under **Items & Services** click on the appropriate checkbox
    - A: This checkbox is used to select all line items. Use this when you want to set all line items to the same Department code and Account code.
    - B: This checkbox is used to select individual lines. Use this when you need to set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



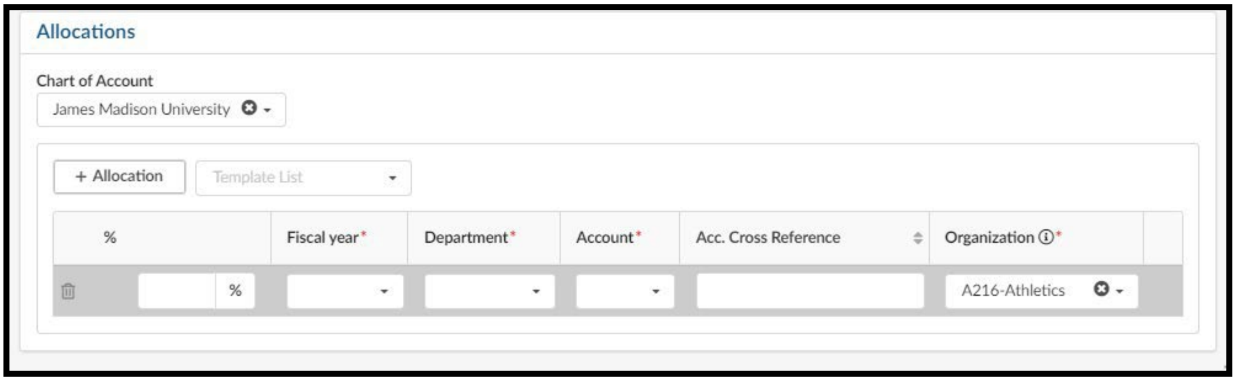
20. Click **Set Allocations** (*Formerly Accounting*)



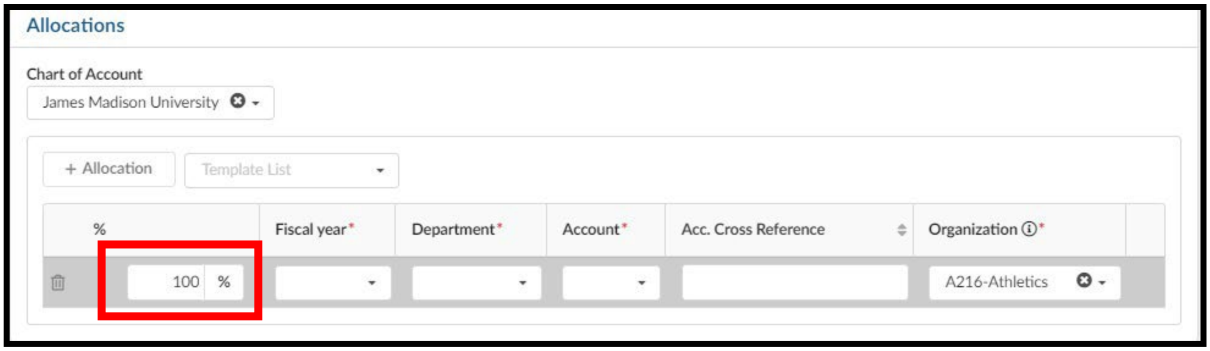
21. The Set Allocations window will display, click **+ Allocation**



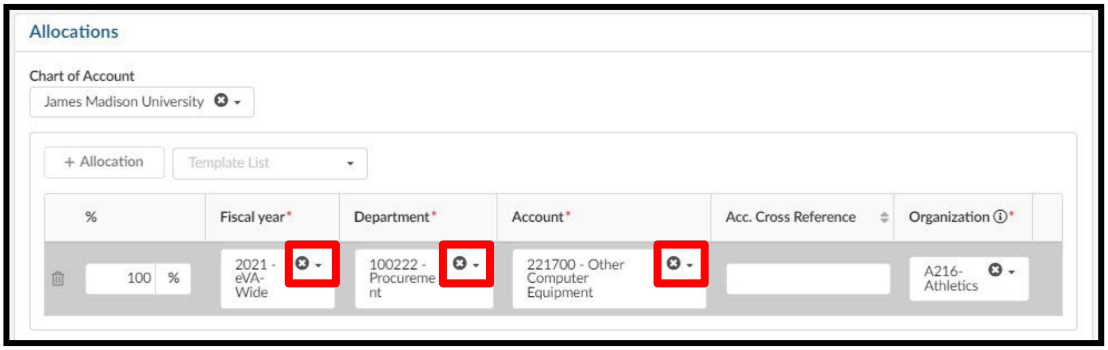
22. A new row will display allowing you to enter required allocation information.



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.

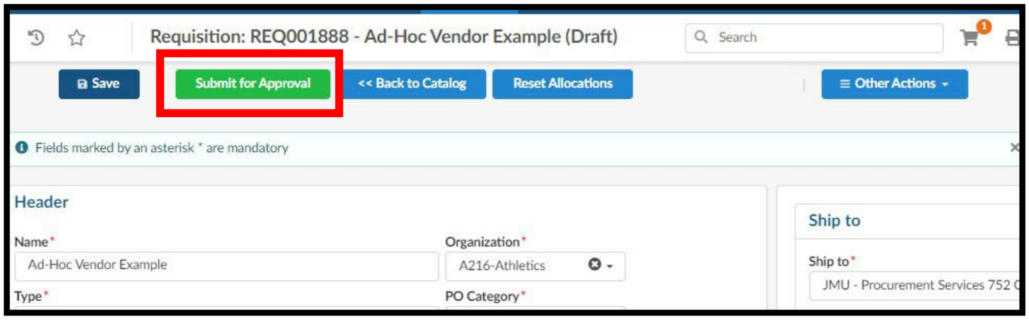


24. You will now complete the other required allocation fields.
    - Select the dropdown arrow for **Fiscal year** and click on the appropriate selection
    - Select the dropdown arrow for **Department** and click in the field and begin typing the department name or department number. The system will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



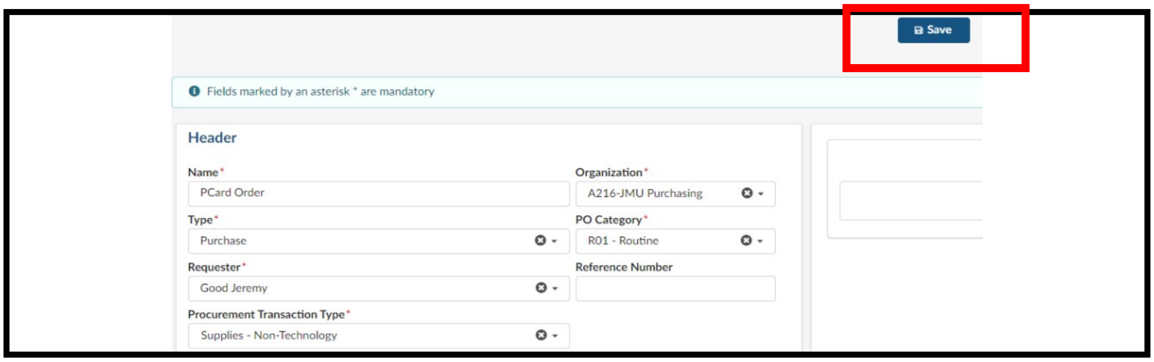
25. At the top of the Set Allocations window, click the **Apply & Close** option

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

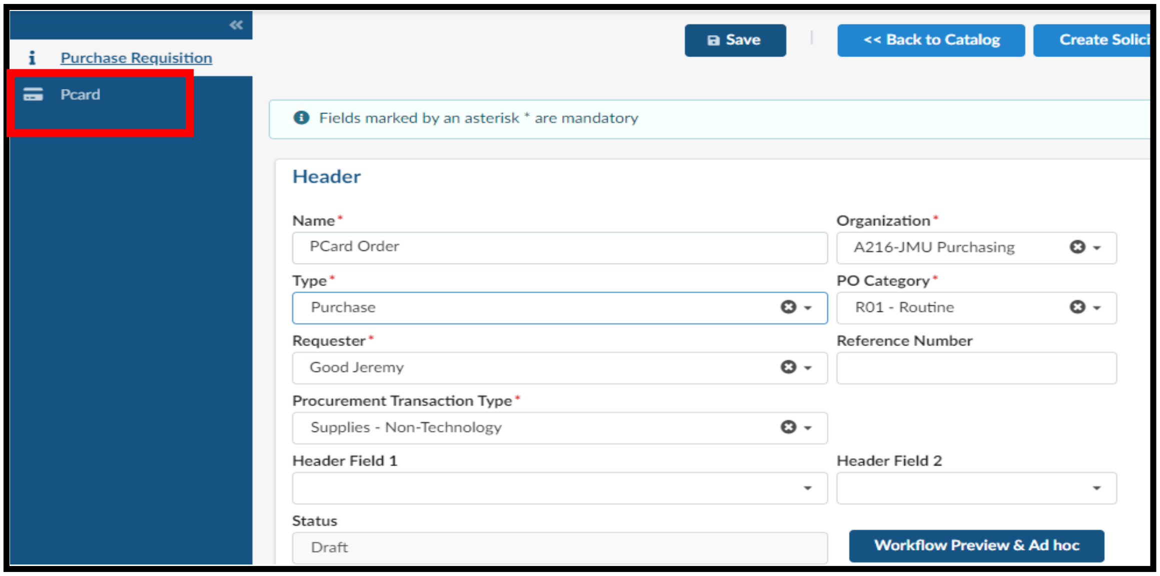


Creating a PCO (PCard Order)

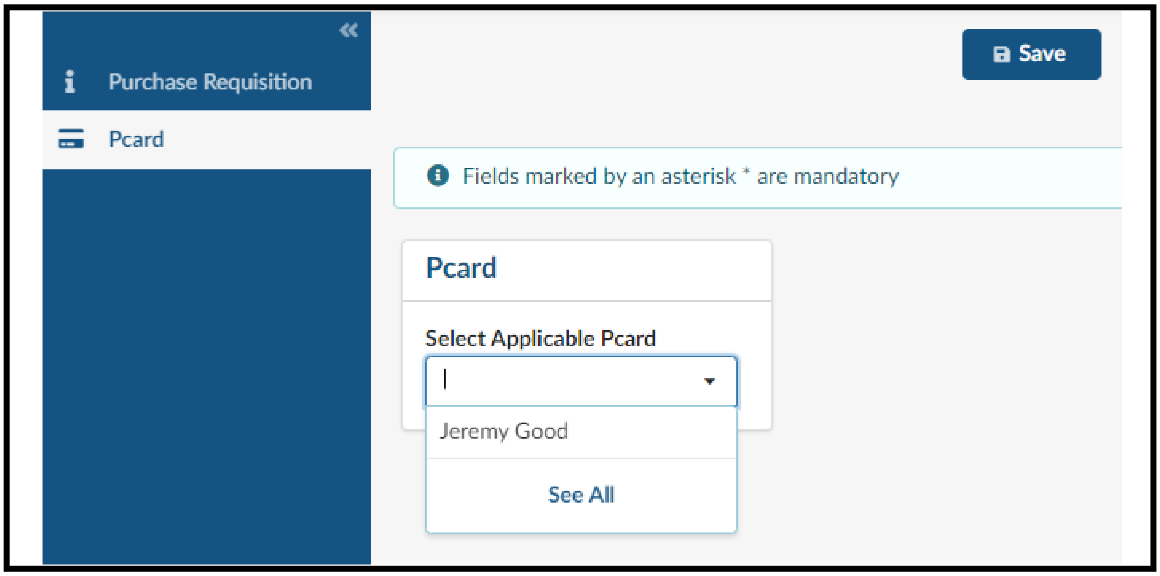
This section covers the process of using a PCard (SPCC) on an order and is supplemental to the previous sections. This can be done in each of the different kinds of orders.



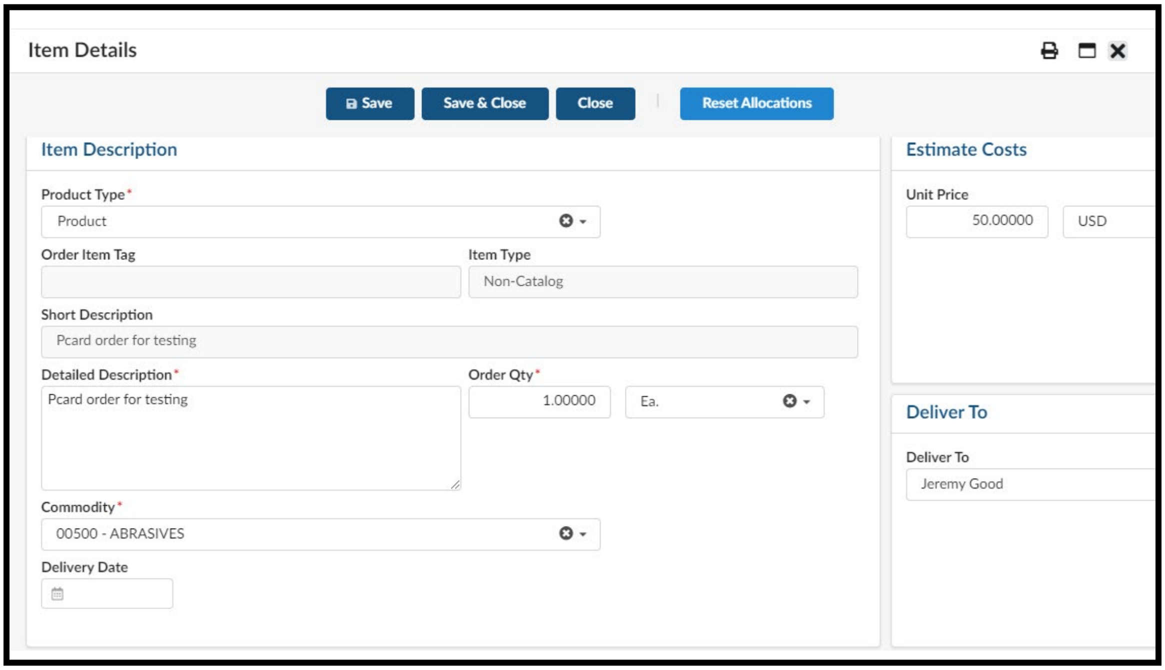
1. Enter in your Header Information in the same way we have for each of the previous examples and click save to enter line item information.



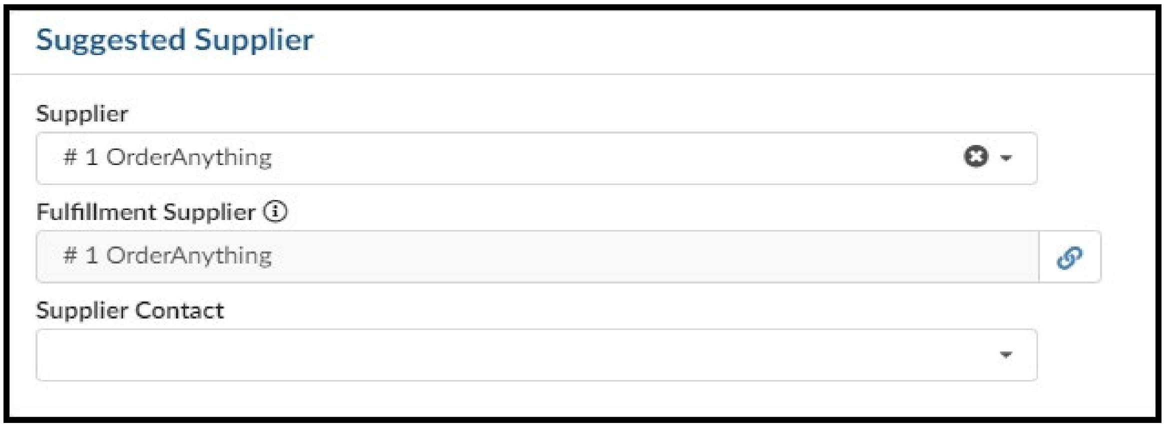
2. On the left side of the requisition screen, click Pcard to add your Pcard to this order. Note, you must have a Pcard already associated with your account to complete this step.

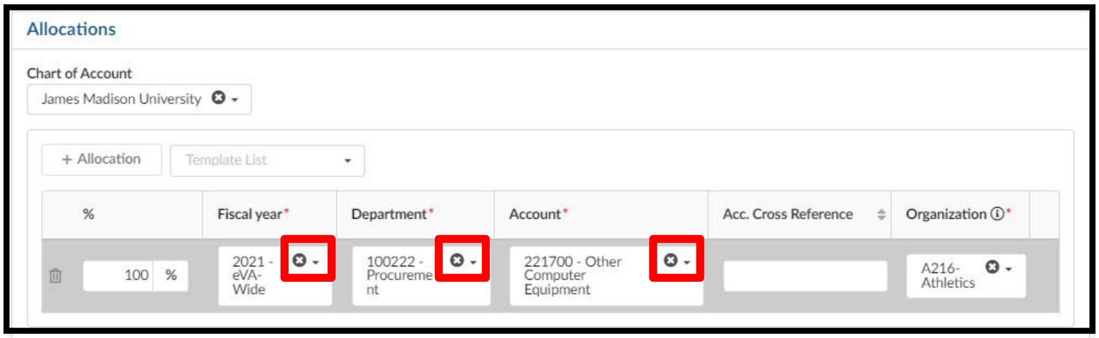


3. From the dropdown, select your Pcard for use. Save once you have selected your Pcard.

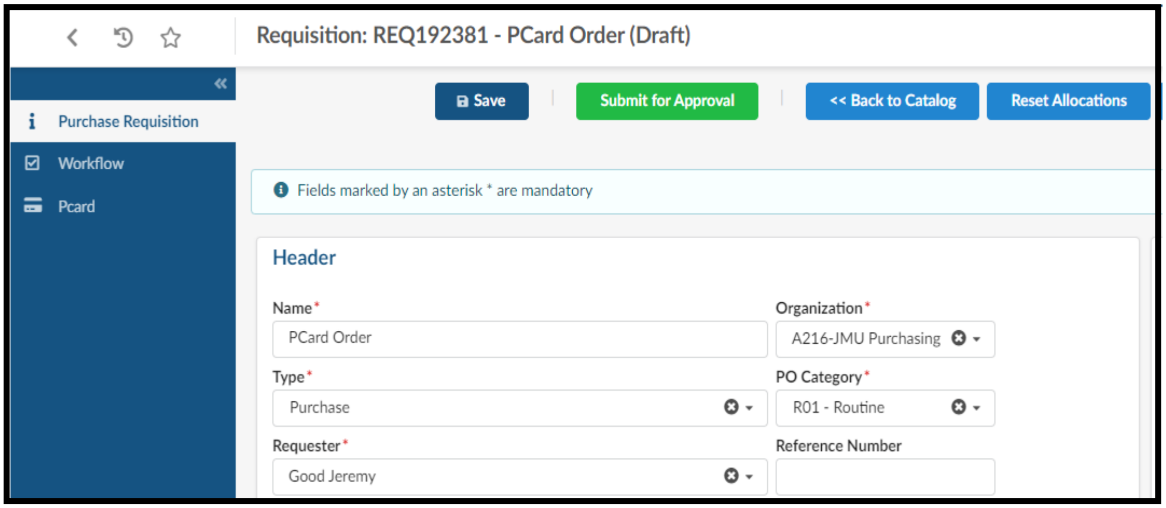


4. Fill in your Item Details screen with the appropriate information for your order.





5. Fill in Supplier Information and add an Allocation.

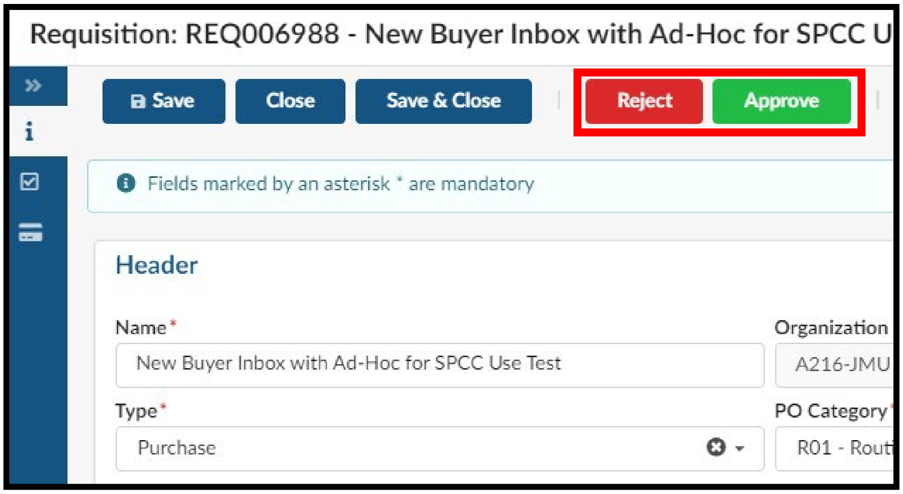


6. You can now click "Submit for Approval" on the order.

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.

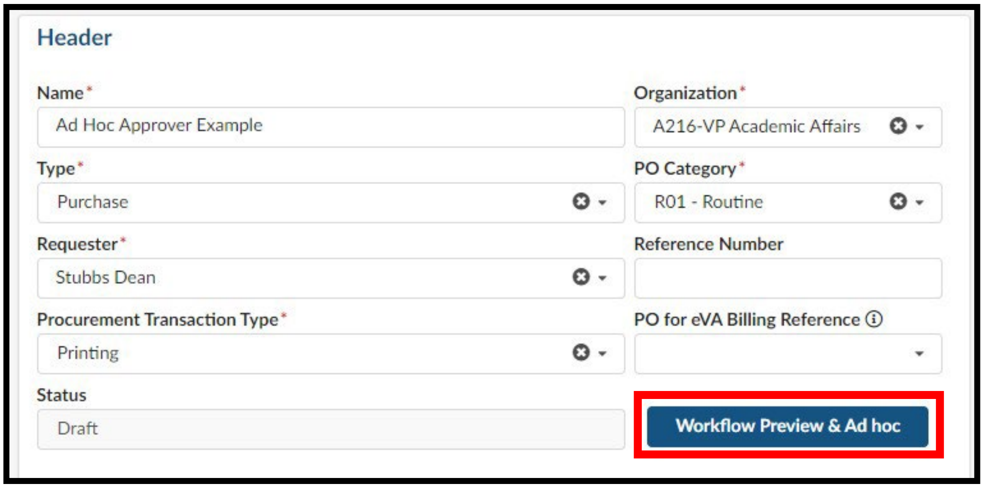


2. The requisition will route to the next stage of approval if there are additional approvals required. The requestor will be notified each time the requisition is approved.

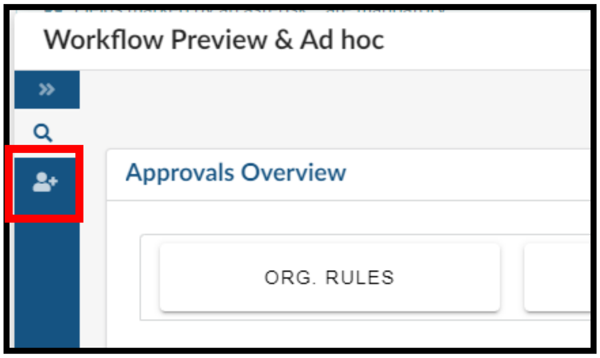
Adding an Ad Hoc Approver

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.

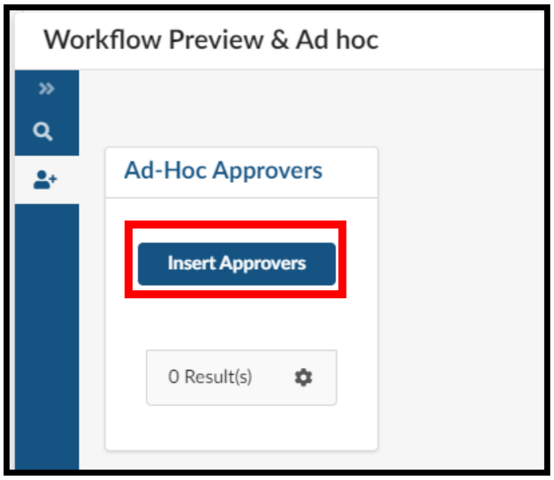
1. From the Requisition Header, click **Workflow Preview & Ad hoc**.
   - The Requisition Header must be completed and **Save** button clicked before starting this process. If not, the ad hoc approver will not save as expected.



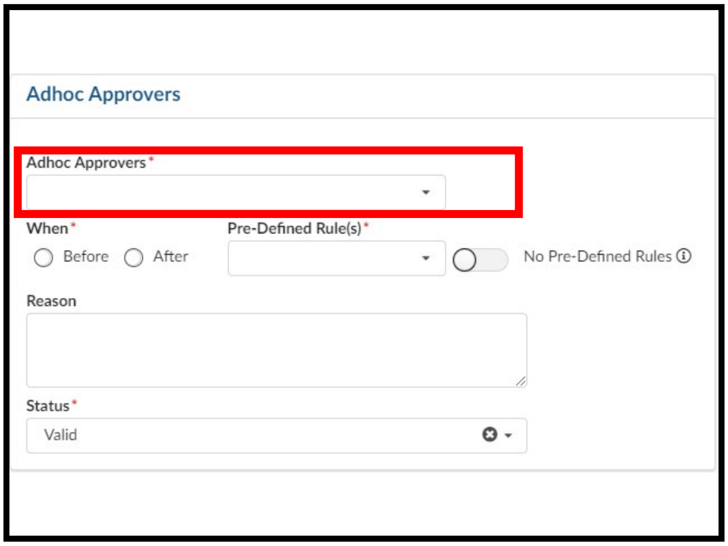
2. From the **Workflow Preview & Ad** hoc window, click the **Ad-Hoc Approver** icon



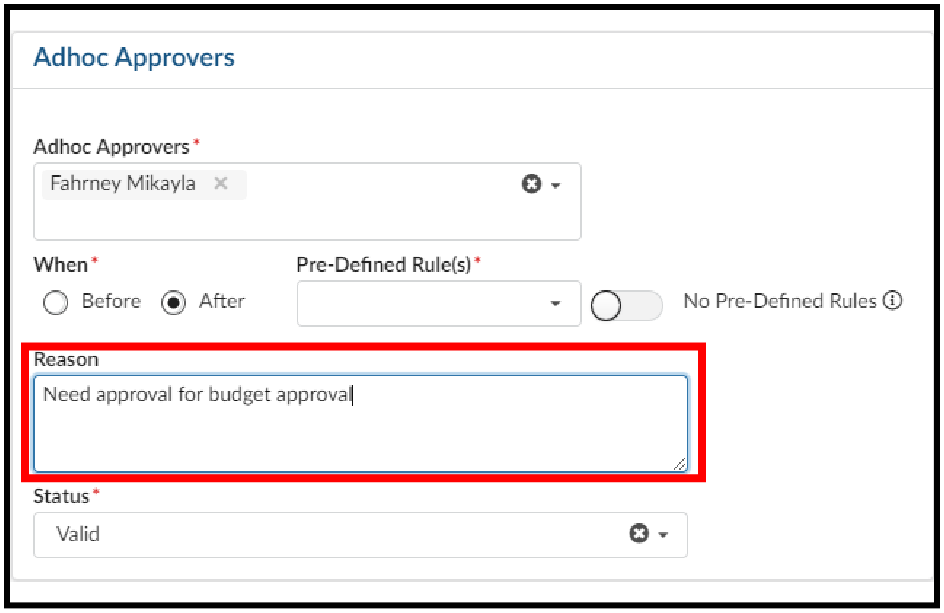
3. Click **Insert Approvers**



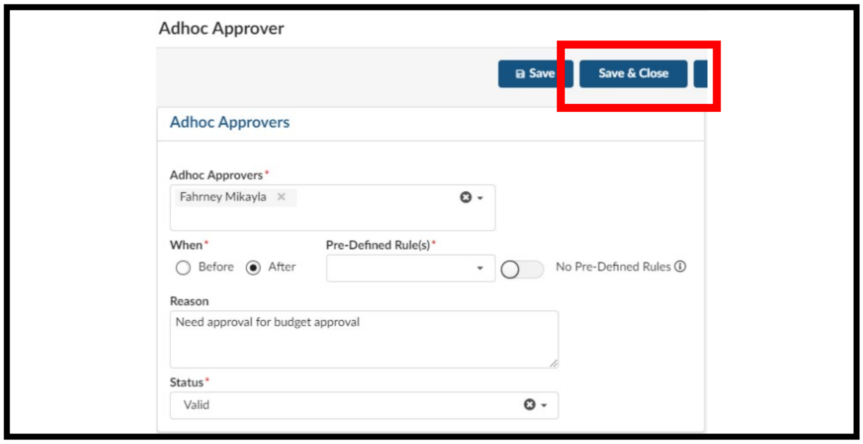
4. From the **Ad hoc Approver** window, enter the name or JMU email address of the card holder in the **Adhoc Approvers** field. The system will begin to populate available results that match. Once you find the correct individual, click on the result in the listing to select them.



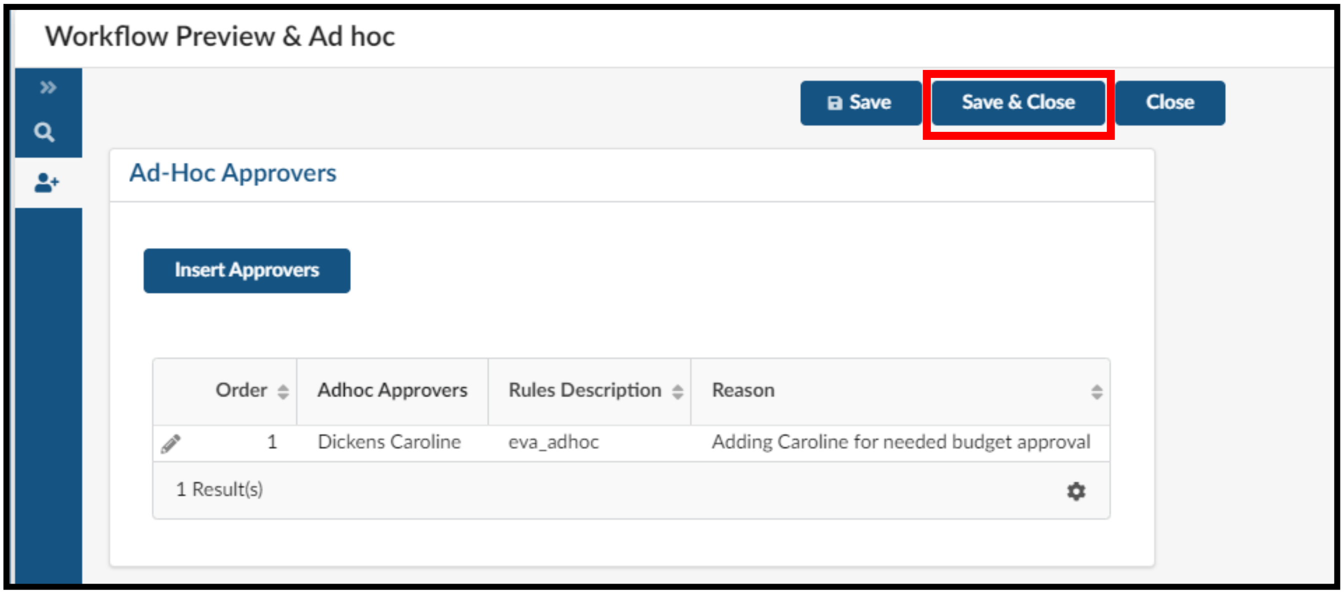
5. In the **Reason** field, enter why you have added this individual as an ad hoc approver.
   - Please note this reason will only display in the Workflow Preview & Ad hoc window, and not in the email notification sent to requisition ad hoc approver



6. Click **Save & Close**



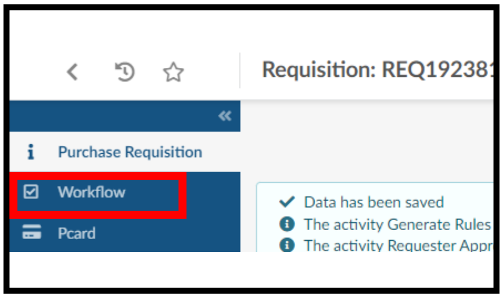
7. From the **Workflow Preview & Ad** hoc window, click **Save & Close**
   - If you need to add additional ad hoc approvers, go back to step three and repeat this process as needed.



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.

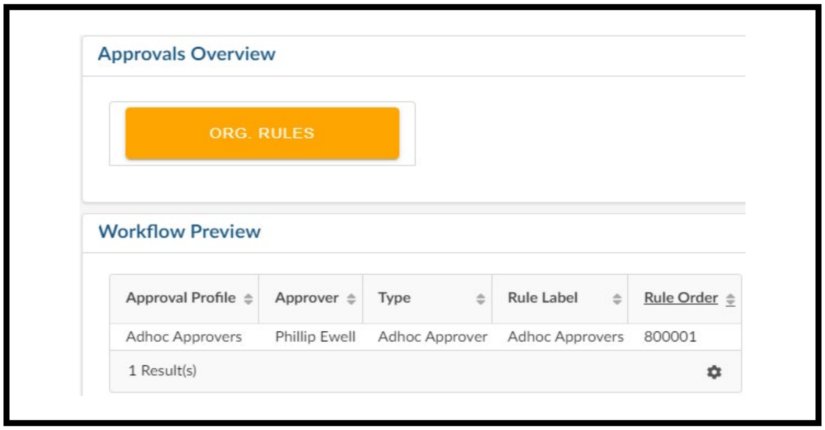
Checking your Orders Approval Flow

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".

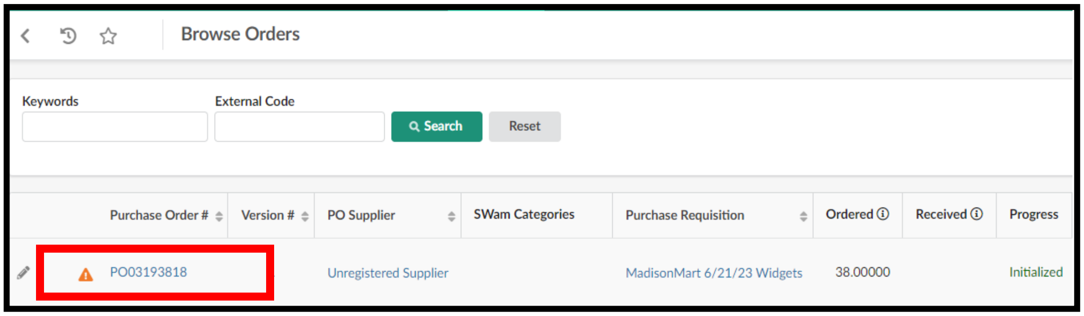


3. Under the workflow preview you can view upcoming approvals depending on the rules assigned by eVA when your order is submitted.

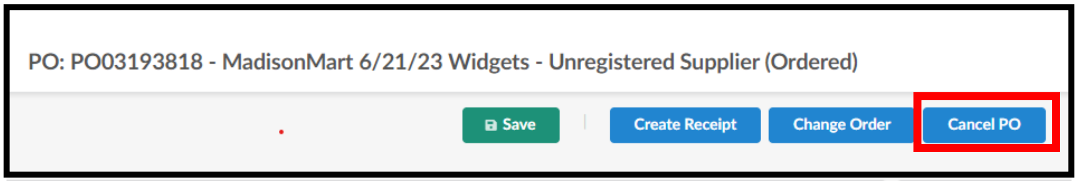
Cancelling an Order in eVA

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.

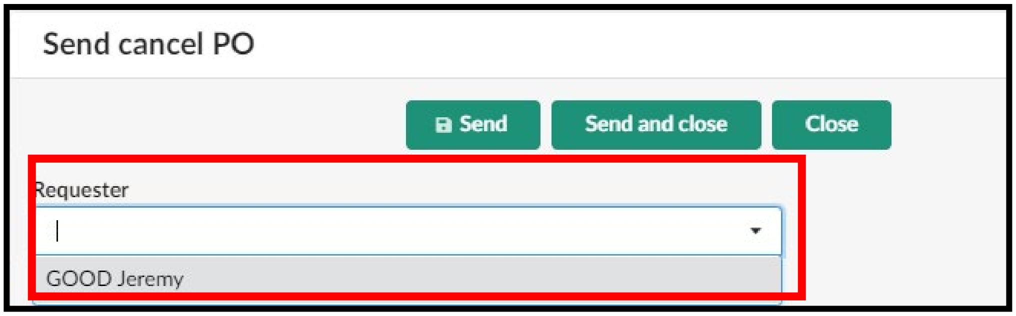
1. Navigate to your Purchase Order, see "Orders" section for instructions. Click on the PO link that needs updated (the blue PO####### text).



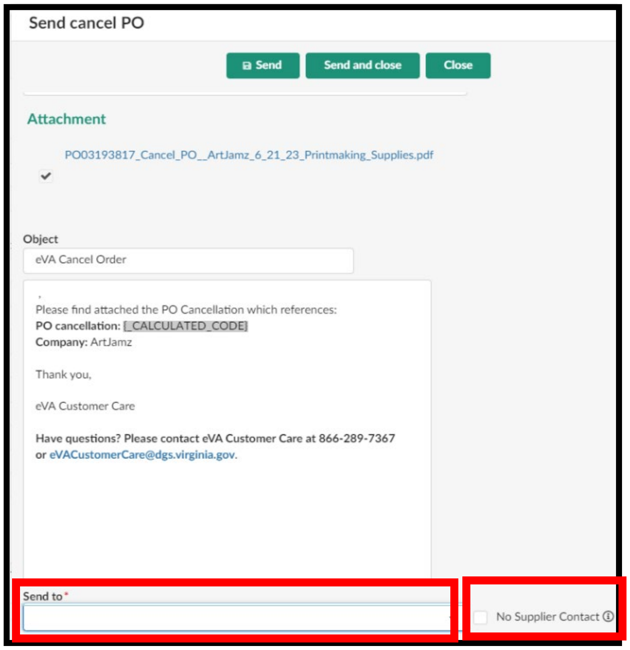
2. Click "Cancel PO".



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



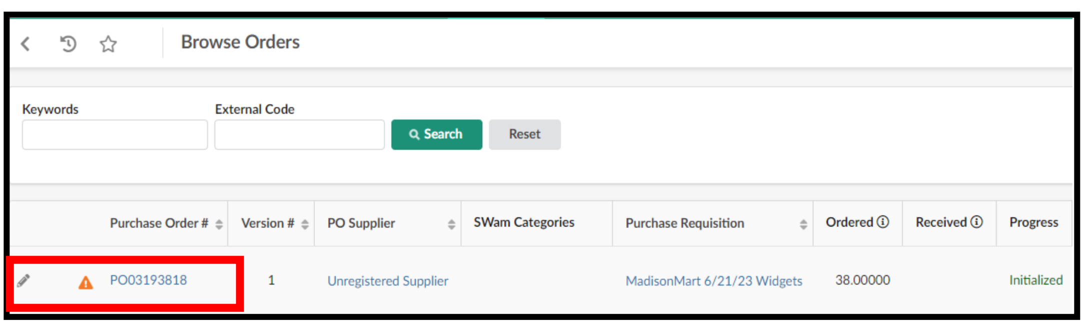
4. Leave the notification text as is. Select a vendor contact from the "Send to" box; if there is not a contact available click "No Supplier Contact". Once this has been done, click Send and close.



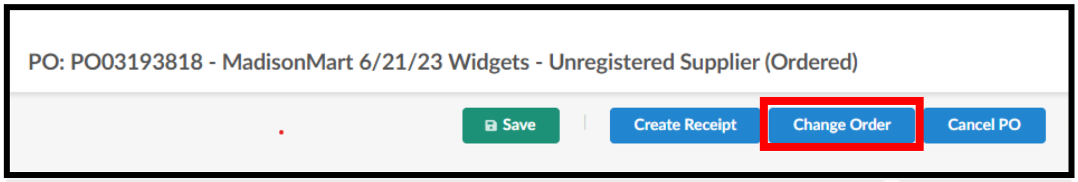
Creating a change order in eVA

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).



2. Click "Change Order".



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

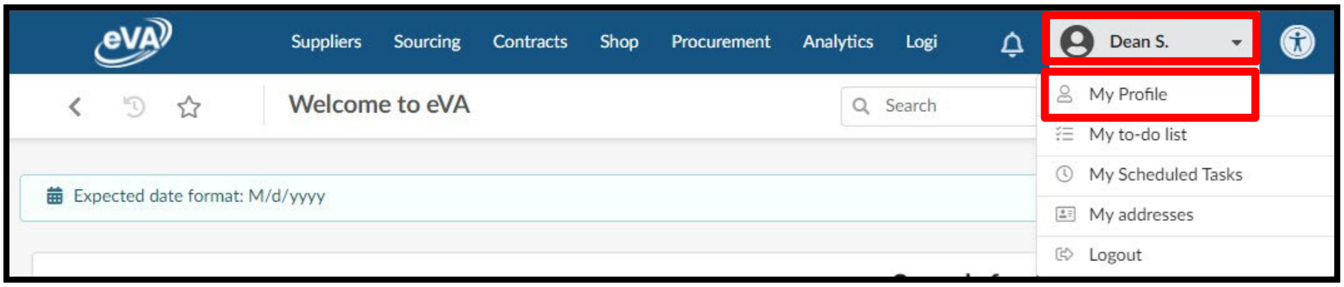
4. After you have made the necessary changes to the PO, click "Submit for Approval". When you submit, the original PO will be cancelled and this new PO will supersede it in eVA.

Managing your SPCC in eVA

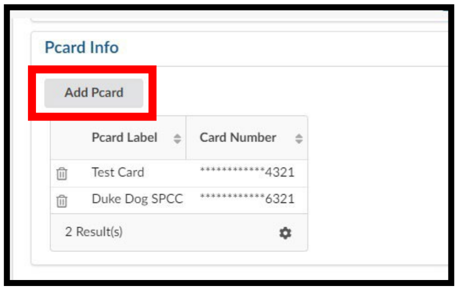
This section covers the process of loading your SPCC, deleting your SPCC, updating your SPCC, and the workaround for associating your SPCC with other users. This section will also cover how to use your SPCC on requisitions. Please note that you can only load an SPCC assigned to you in your eVA account.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

How to load your SPCC to eVA

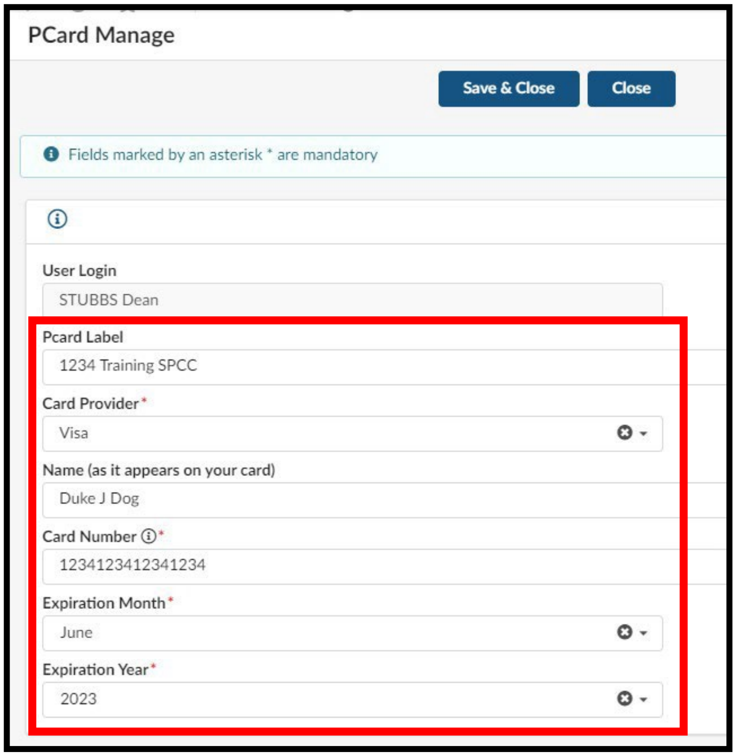
1. Click the **YOUR NAME Icon** and in the dropdown menu, click **My Profile**



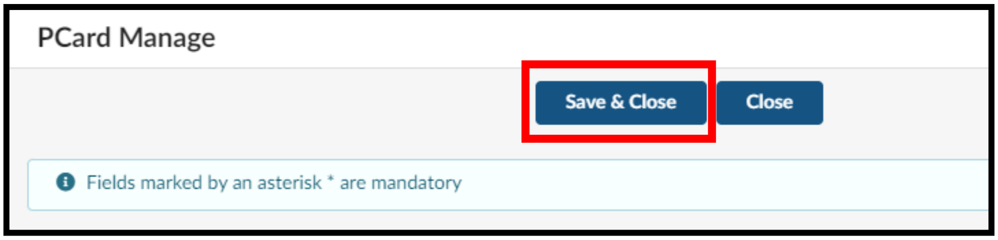
2. From the Profile Management page, scroll down the Pcard Info section, click **Add Pcard**



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



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

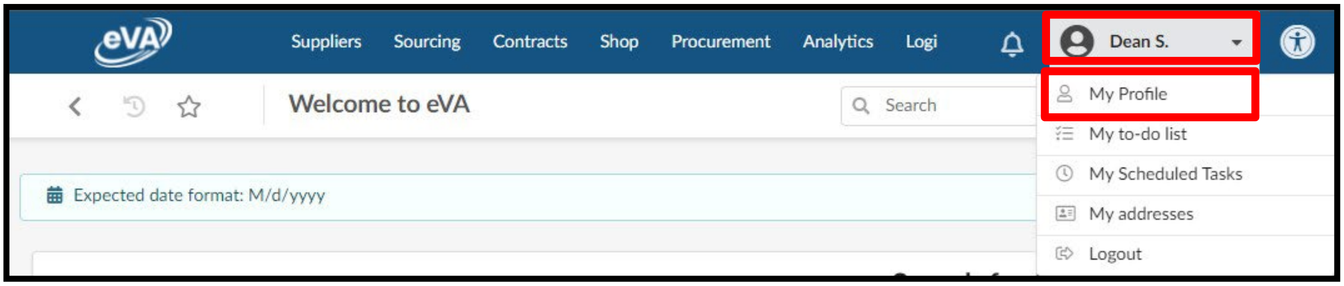


5. Your SPCC will now be available for use on requisitions immediately. You may need to refresh the Profile Management page to see the card you just added.

How to update and remove your SPCC

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

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



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

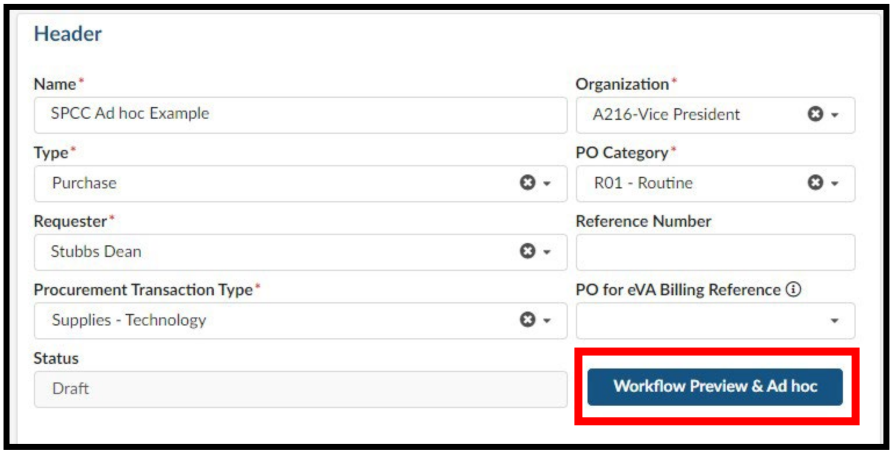
3. A confirmation pop-up window will display. Select **OK** to delete the card. The card will be deleted immediately.

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

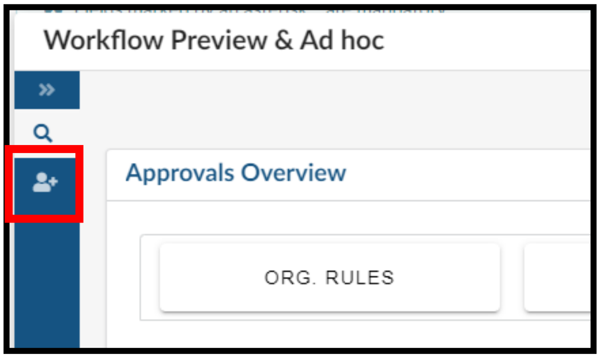
How to associate others with your SPCC (ad hoc approver process)

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

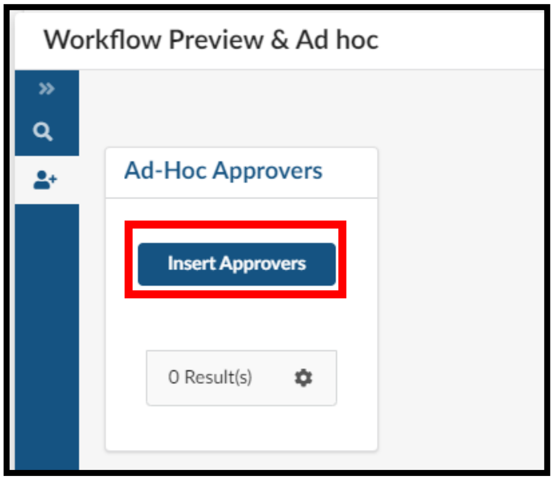
1. From the Requisition Header, click **Workflow Preview & Ad hoc**.
   - The Requisition Header must be completed and **Save** button clicked before starting this process. If not, the ad hoc approver will not save as expected.



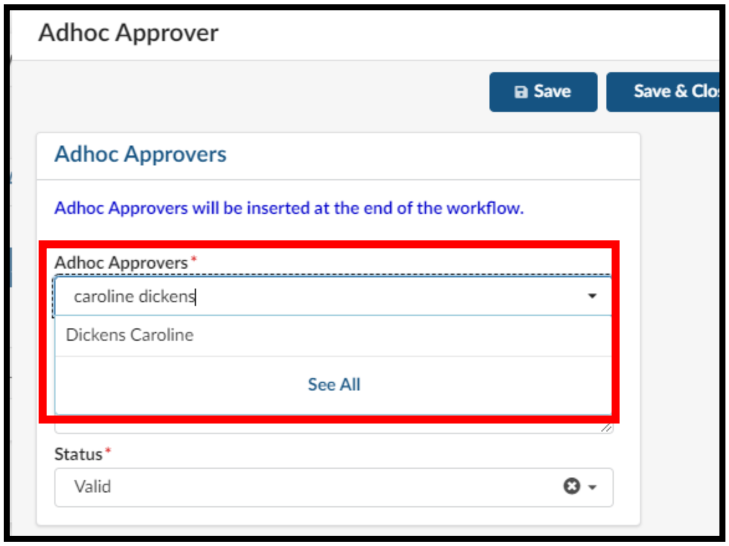
2. From the **Workflow Preview & Ad** hoc window, click the **Ad-Hoc Approver** icon



3. Click **Insert Approvers**



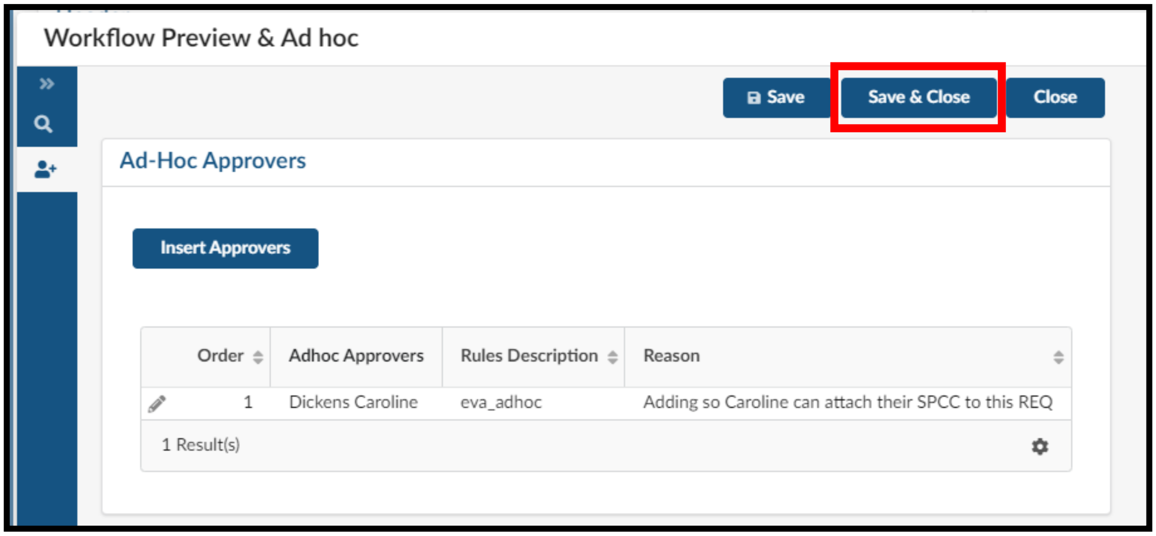
4. From the **Ad hoc Approver** window, enter the name or JMU email address of the card holder in the **Adhoc Approvers** field. The system will begin to populate available results that match. Once you find the correct individual, click on the result in the listing to select them.



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

6. Click **Save & Close**

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

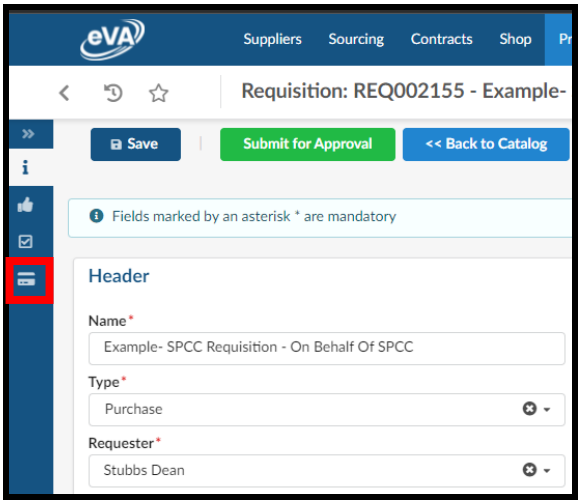


8. Once the requisition has been submitted, the selected ad hoc approver will be added into the approval flow and will be notified to approve when it is their turn.
    - If that user has an active SPCC on their eVA profile, they will be able to add it to the requisition. See How to add or remove a SPCC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

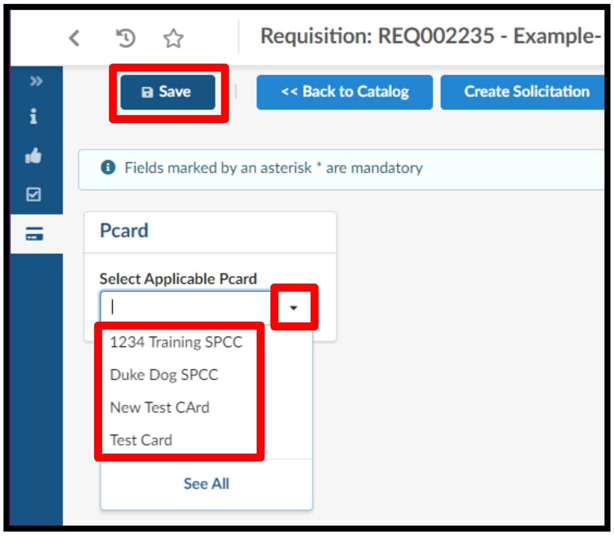
How to add or remove a SPCC onto a requisition

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.

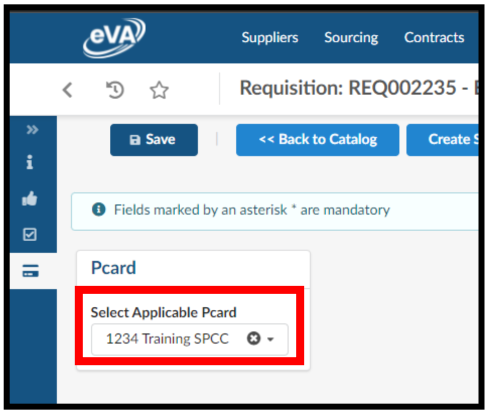
1. On the left-hand side of the requisition screen, click the Pcard icon



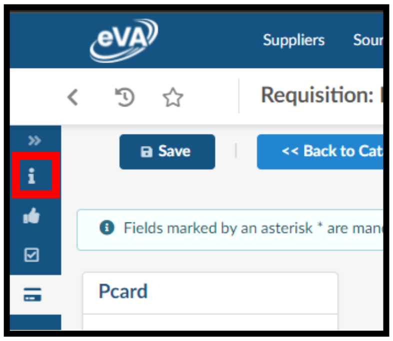
2. From the Pcard tab, select the dropdown arrow for **Select Applicable Pcard**. Select the appropriate SPCC for the requisition, then click **Save**.

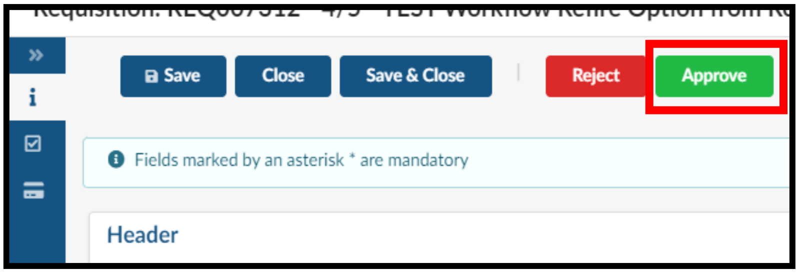


3. Once the selected SPCC is listed under **Select Applicable Pcard,** after the requisition is fully approved, it will generate a PCO. If the supplier accepts electronic orders and Pcards, the selected SPCC will be visible to the supplier in their eVA account.

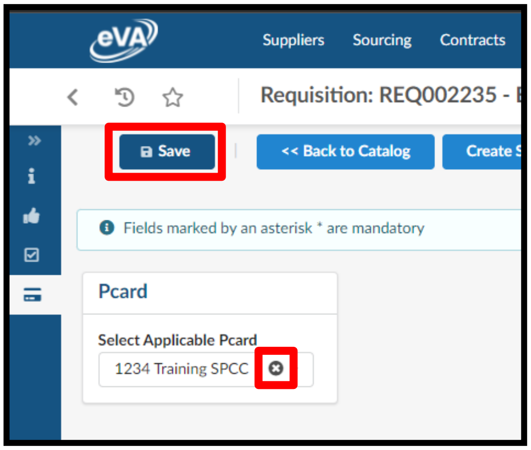


- If you are adding your SPCC onto a requisition as part of an ad hoc approver process, click the **i icon** and then click **Approve** to move the REQ forward in the approval flow





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

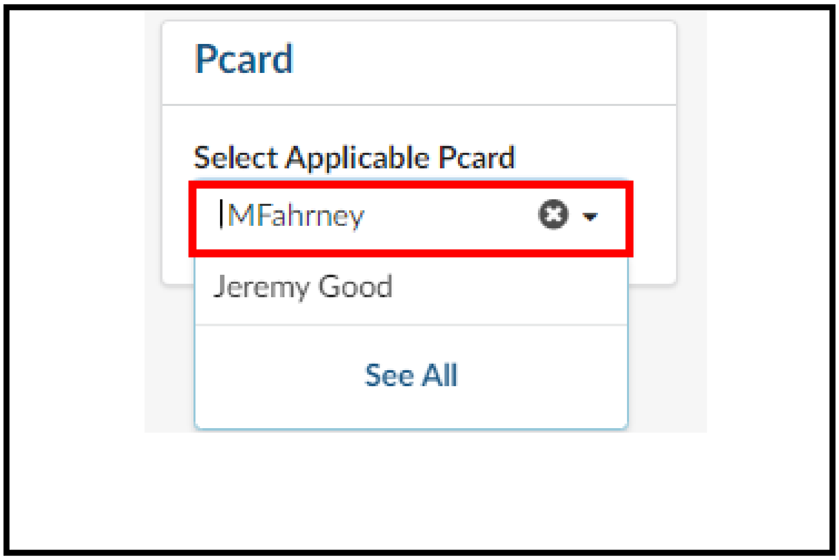


How to Order on Behalf of Another User

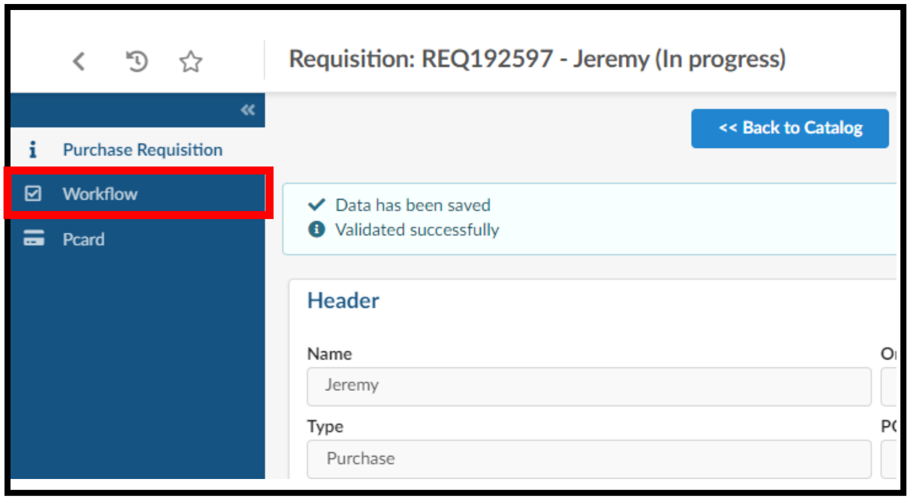
This section will detail giving "On Behalf of" access to another user and selecting that user when placing an order. When this access is given, if you place an order on behalf of another user, it will follow their approval flow. Please note that Org Rules and Signature Authority procedures still need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

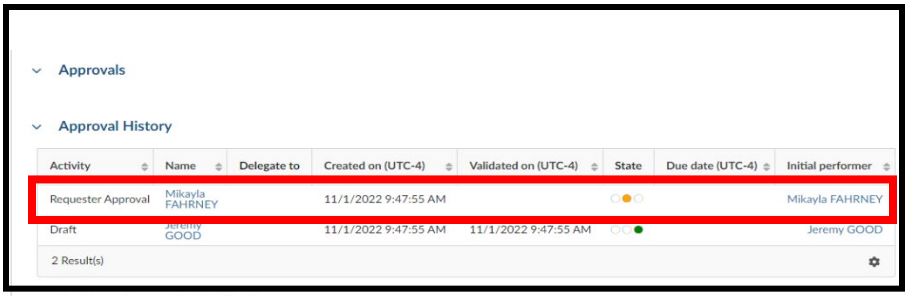
1. When you create a new requisition, you will have access to change the requestor to the alternate user and choose who the requestor is.

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.



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.





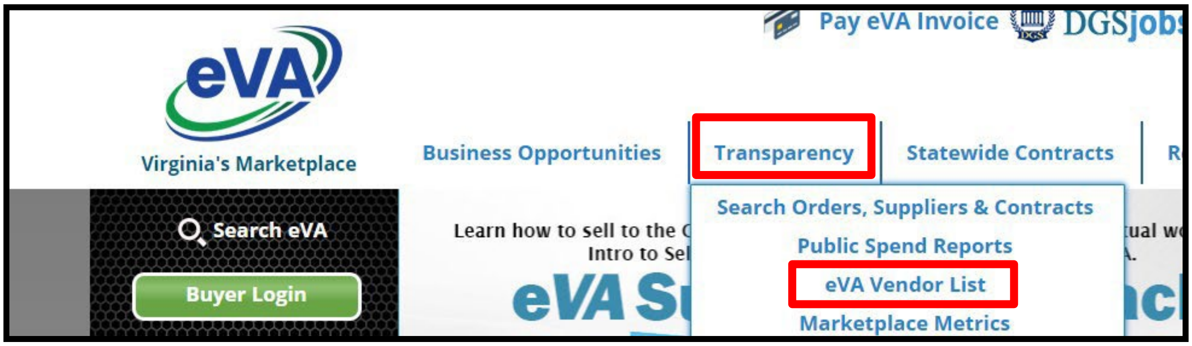
Searching for Suppliers, Orders, & Requisitions

Suppliers outside of a requisition

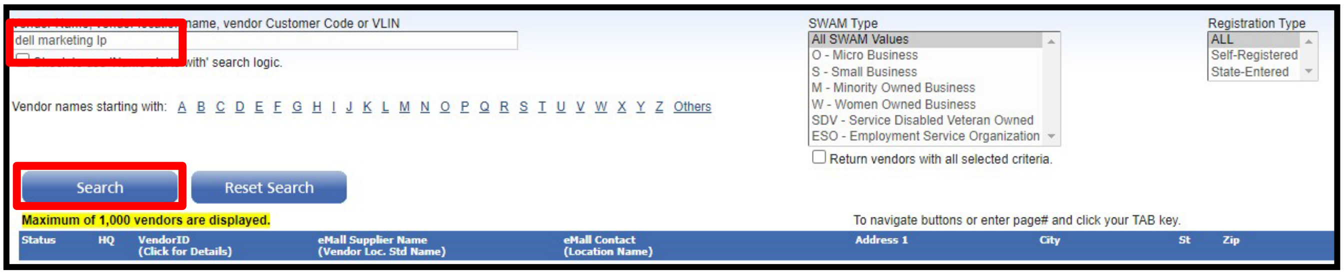
When searching for suppliers there are two options. First, is to use the eVA public vendor list which will not change as a result of New eVA. Second is to search from within the New eVA Supplier area.

To search the public eVA Vendor list

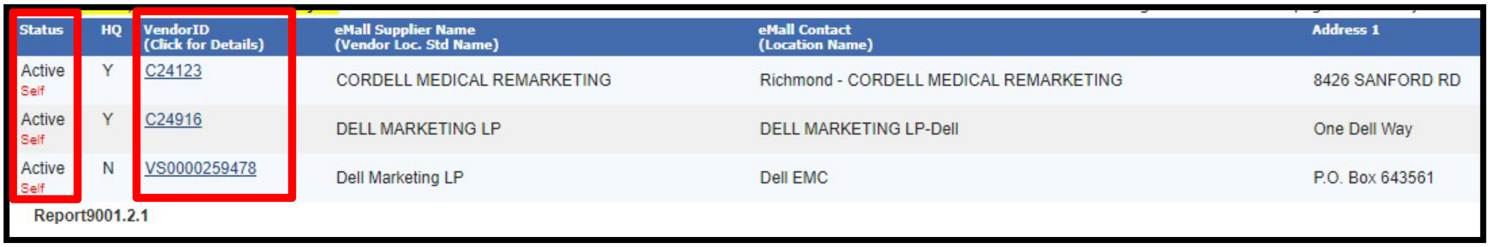
4. Go to the eVA homepage eva.virginia.gov
5. From the top center, click **Transparency**, then **eVA Vendor List**



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



7. Once the search result return, and you have identified the correct suppler 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



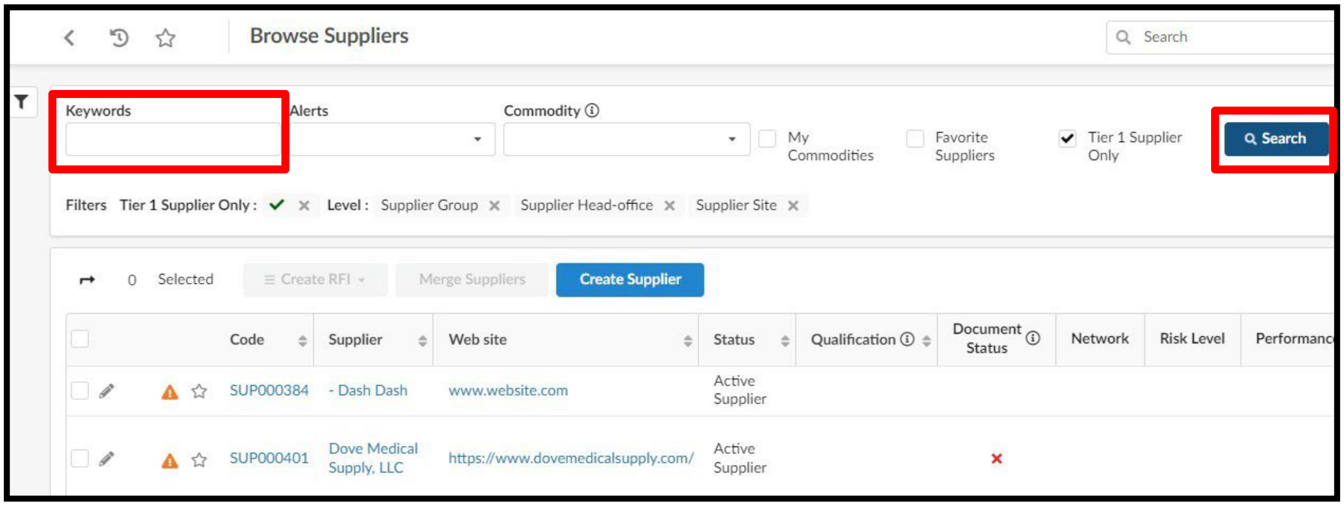
Status	HQ	VendorID (Click for Details)	eMall Supplier Name (Vendor Loc. Std Name)	eMall Contact (Location Name)	Address 1
Active Self	Y	C24123	CORDELL MEDICAL REMARKETING	Richmond - CORDELL MEDICAL REMARKETING	8426 SANFORD RD
Active Self	Y	C24916	DELL MARKETING LP	DELL MARKETING LP-Dell	One Dell Way
Active Self	N	VS0000259478	Dell Marketing LP	Dell EMC	P.O. Box 643561

Report9001.2.1

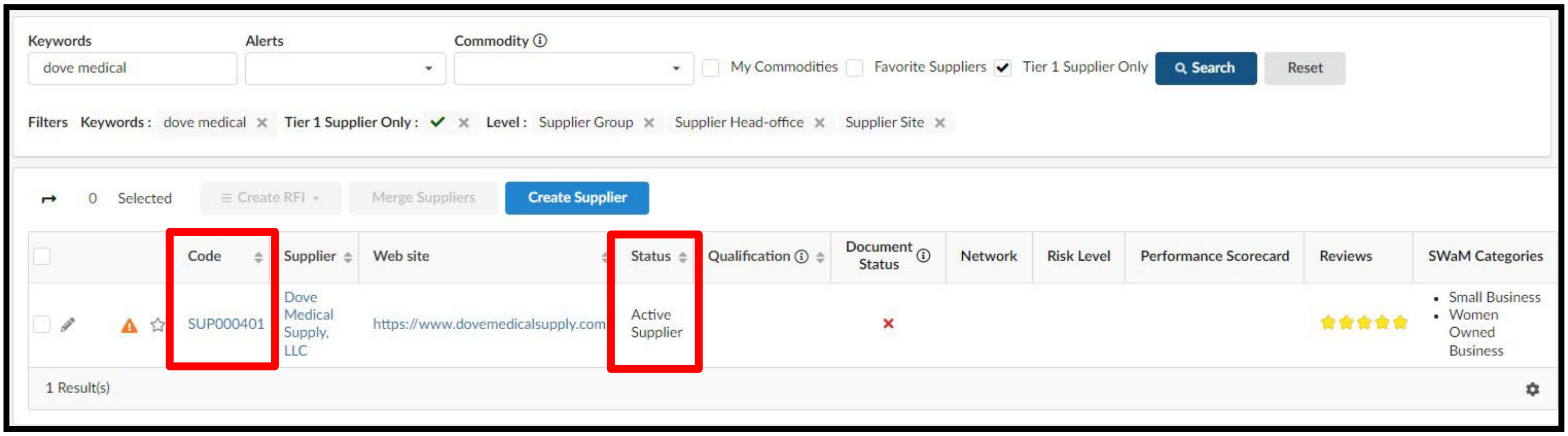
To search the within New eVA (outside of creating a requisition)

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

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

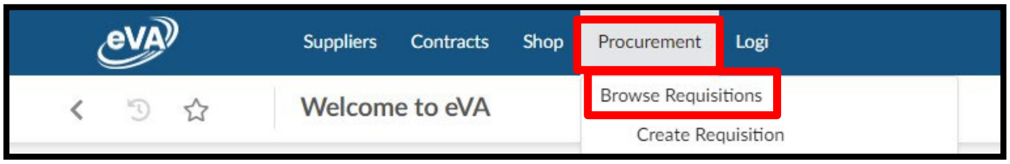


3. Once the search results are returned there are several items to make note of
   - **Code** – this is the supplier's eVA ID number that can be used to search with when creating a line item, instead of the supplier's name.
   - **Status** – this indicates the supplier's eVA status. Previously a deactivated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

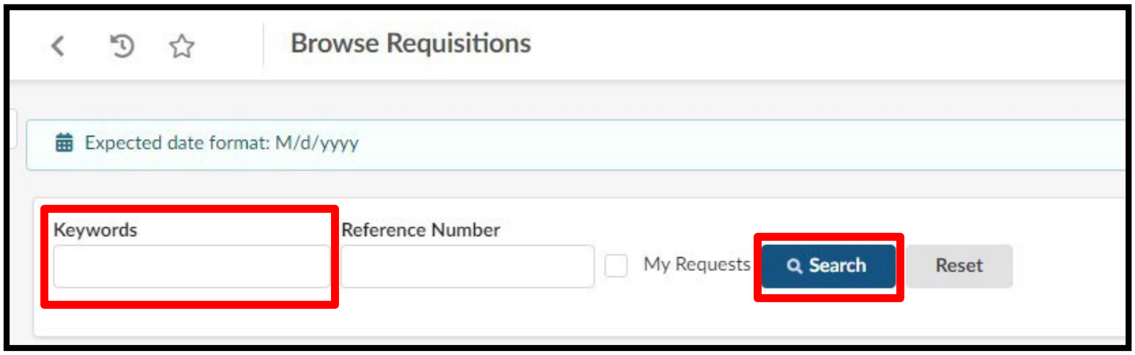


Requisitions

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



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

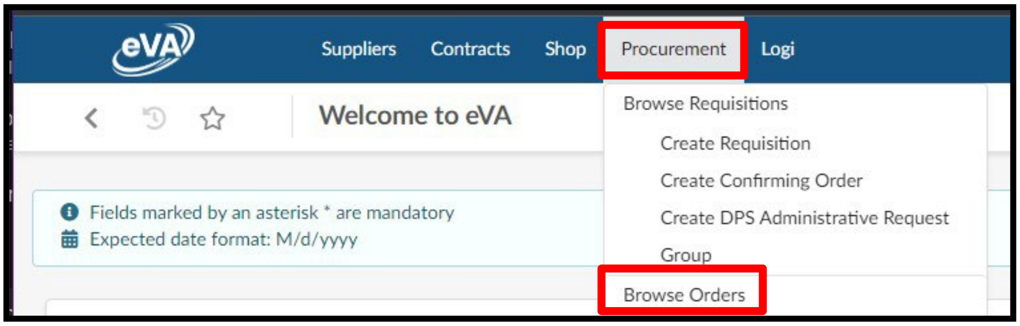


- If you need to search a PR# (created in old eVA that converted), enter the PR# into the **Reference Number** field
- To search only your requisitions, select the checkbox beside **My Requests**

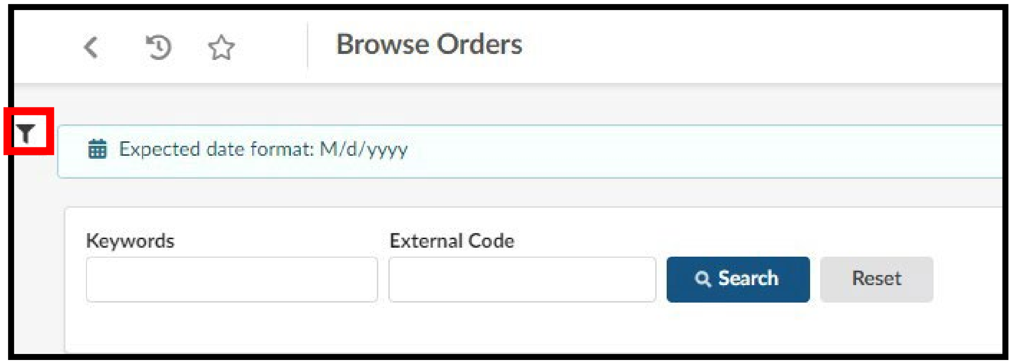
Orders

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.

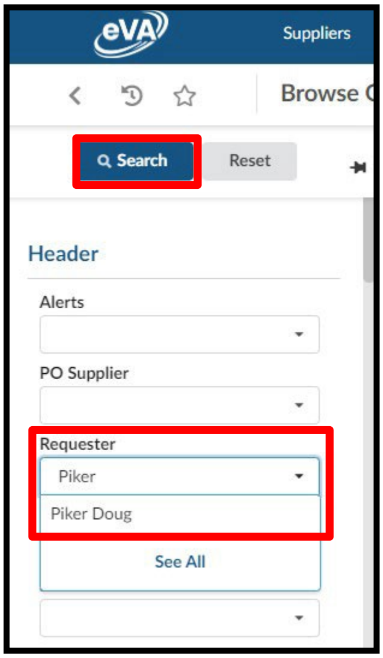
1. Click **Procurement** and then in the dropdown menu, click **Browse Orders**



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

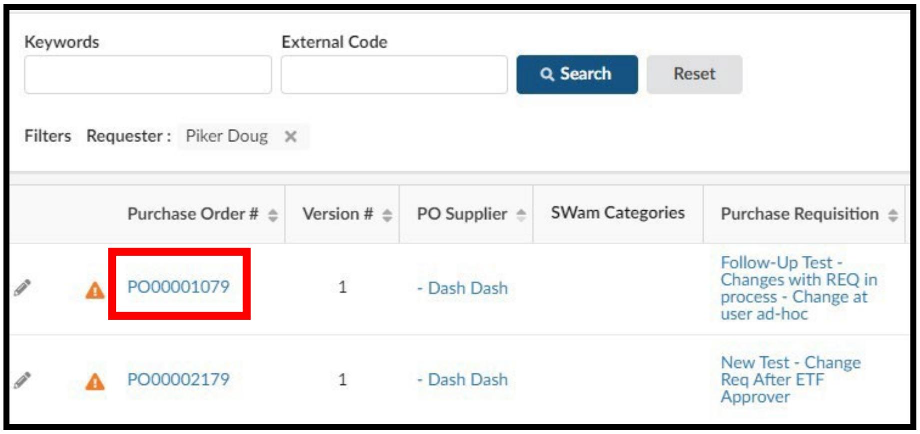


3. From the **Filter** window, enter the name or JMU email address of the requester in the **Requester** field. The system will begin to populate available results that match. Once you find the correct individual, click on the result in the listing to select them. Then click **Search.**



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

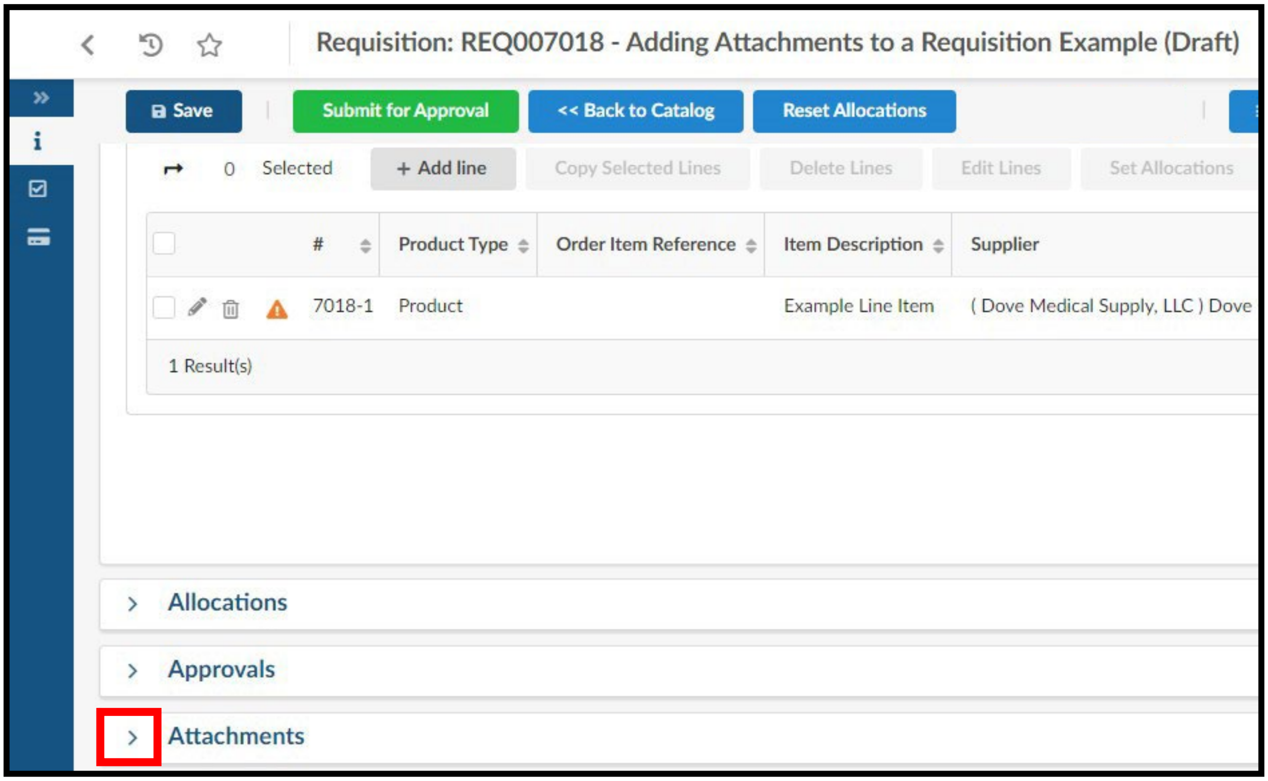
5. Select the appropriate order by clicking the blue hyperlink under the **Purchase Order #** column



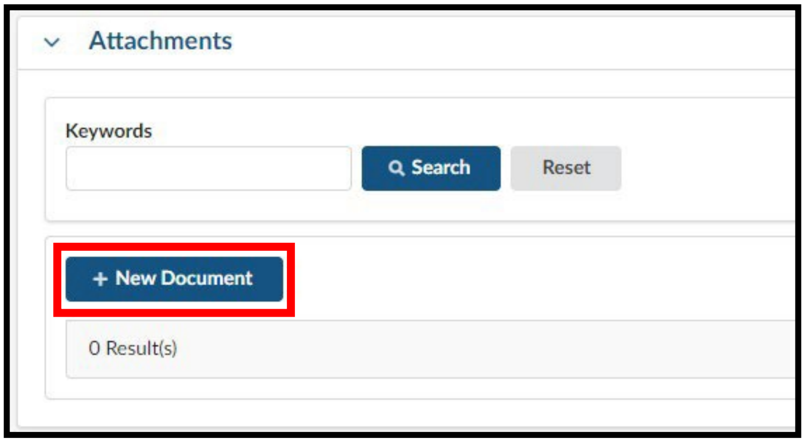
Adding Attachments to a Requisition

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.

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

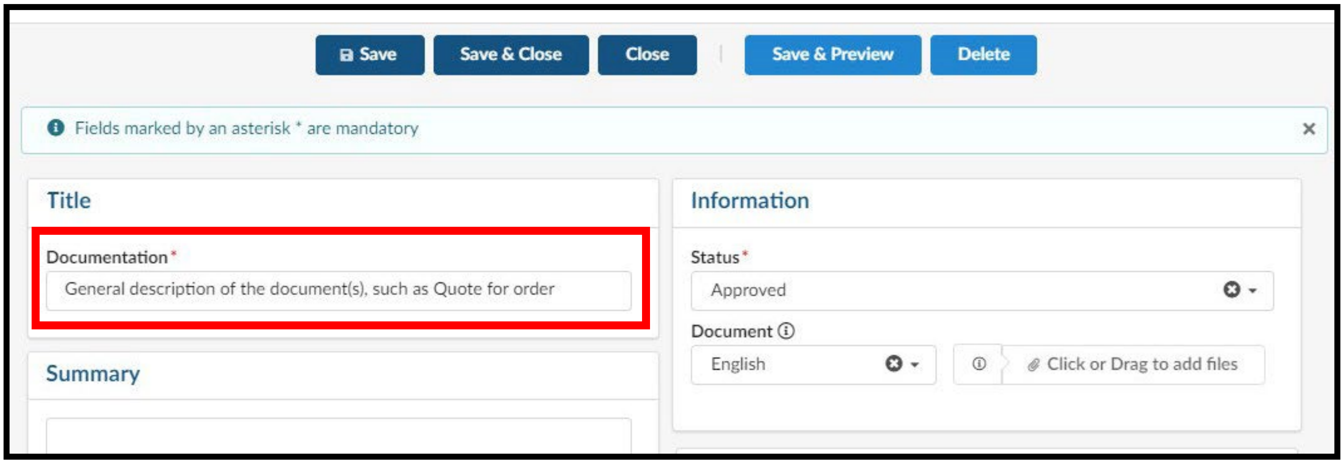


2. Once the Attachment section has expanded, click **+ New Document**

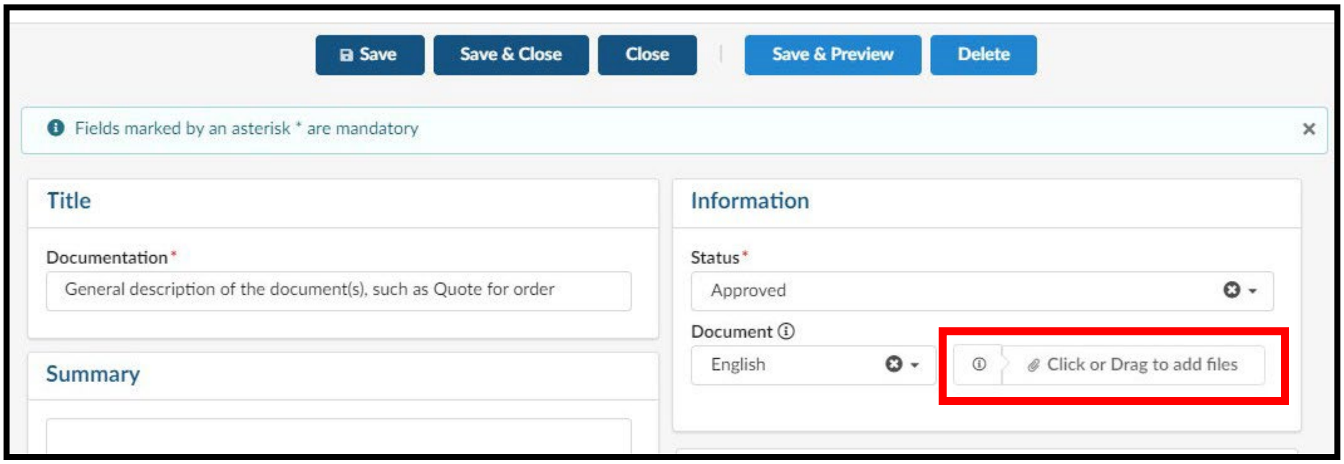


3. From the **Content editor** window, click either **Internal Attachment** or **Supplier Document**
    - It is important to make the correct document type selection, because to change the document type later requires deleting and then reattaching the file. There is no check box to switch the visibility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

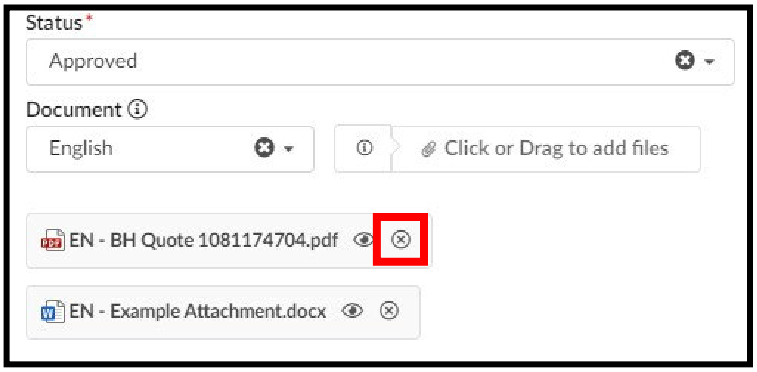
4. From the **Internal Attachment** or **Supplier Document** window, enter a general description for the attachment(s) that will be added in the **Documentation** field



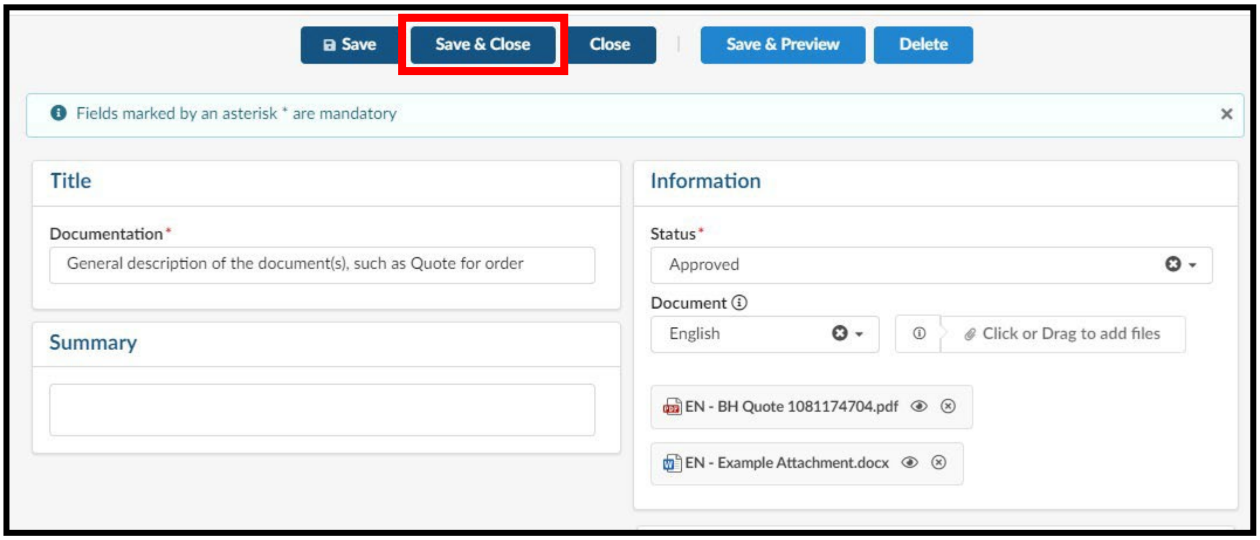
5. To add files, either Click the **Click or Drag to add files** button or drag and drop files over this button to attach.
    - Multiple files can be at once using either method. However, the file size for each individual file must be less than 300 MB. The attachment process can also be repeated to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



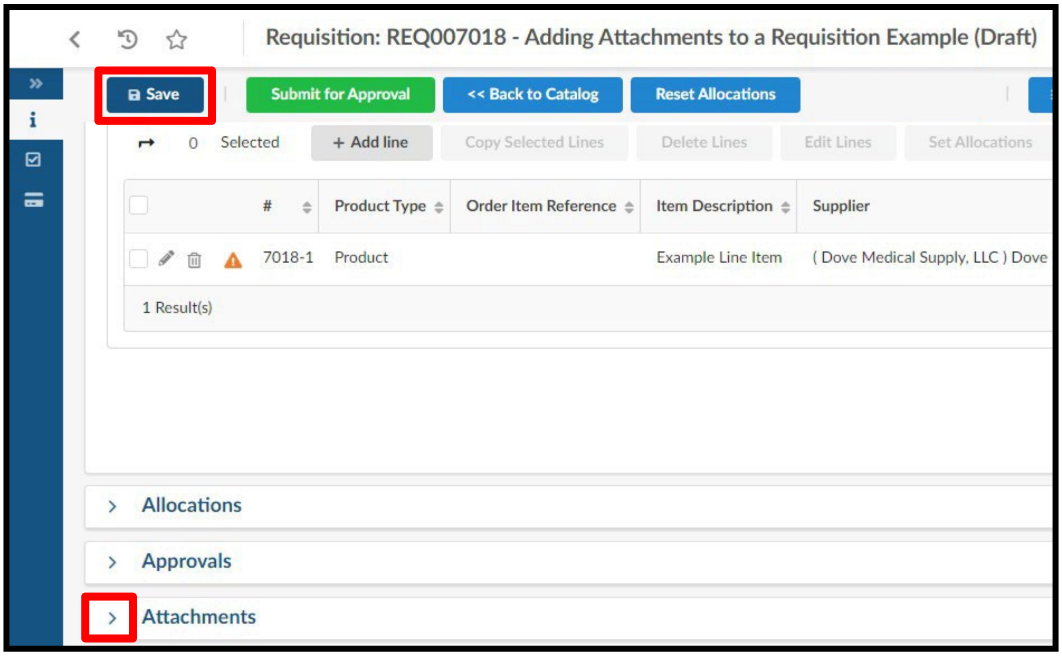
6. If you need to delete an attachment, click the **X** icon



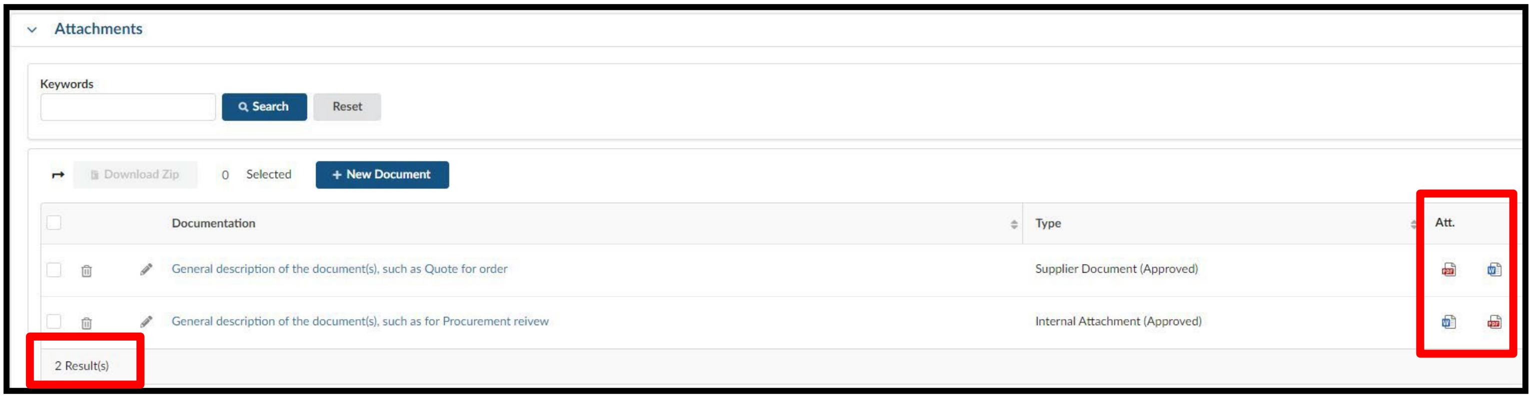
7. After the needed files have been added, click **Save & Close**



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



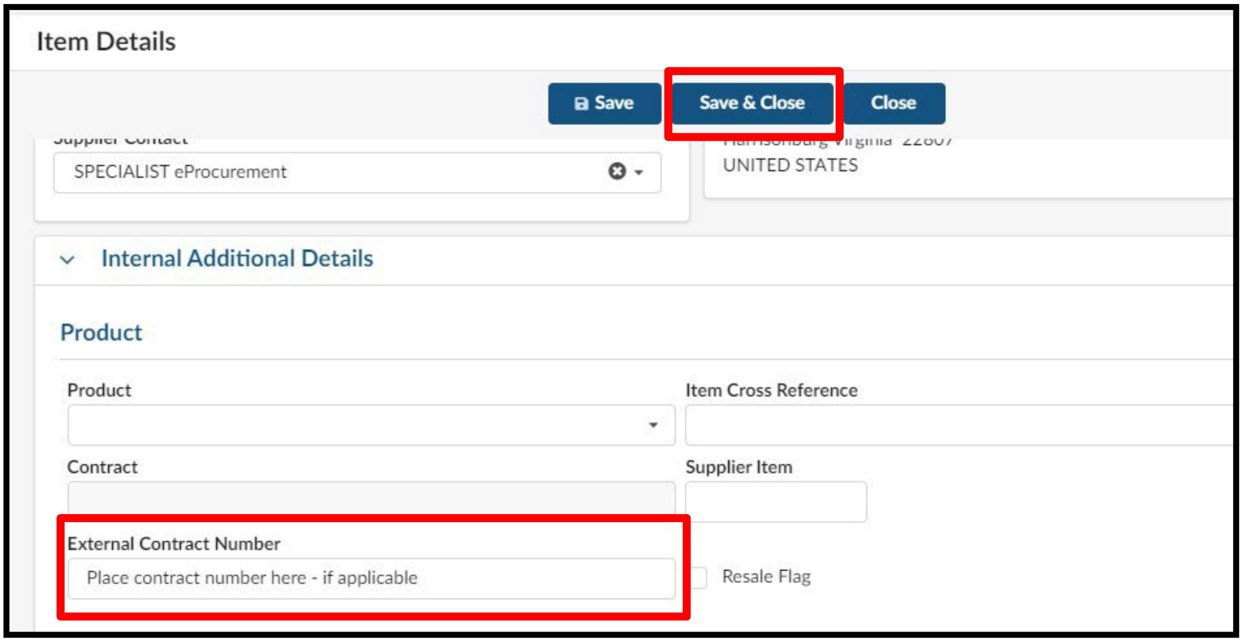
9. The attachments added will display in the listing. If multiple attachments were uploaded at once, those will be indicated in the **Att.** column with multiple icons. The **# Result(s)** at the bottom of the attachments table is based off the number of times step two and three are completed, and not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

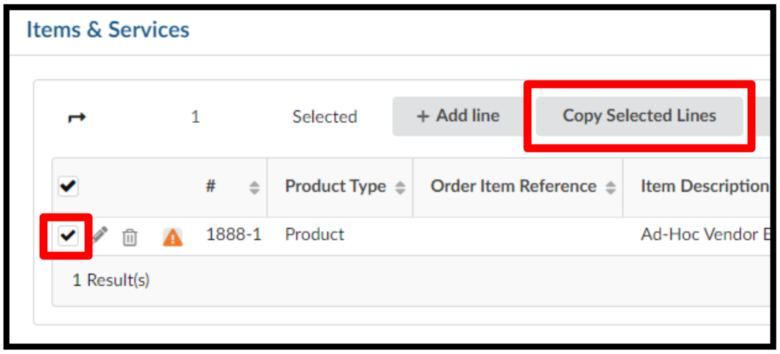
1. From within the line item, scroll down to the **Internal Additional Details** section and look for the **External Contract Number** field. You will just need to type or copy and paste the needed contract number into the field – if applicable.
    - Continue editing the line item normally, and then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



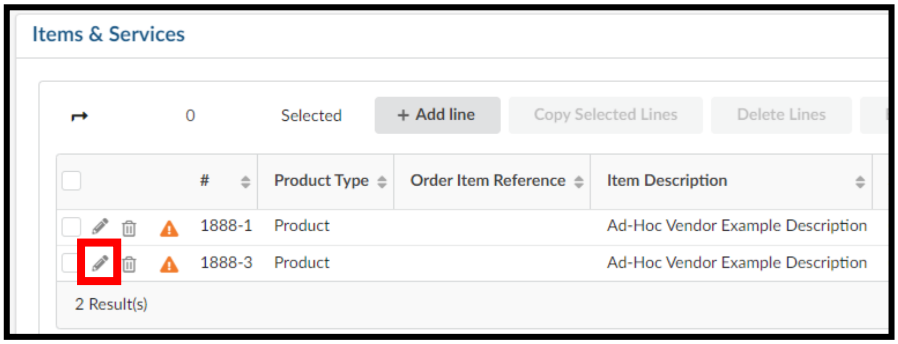
Breaking Out Shipping Charges

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.

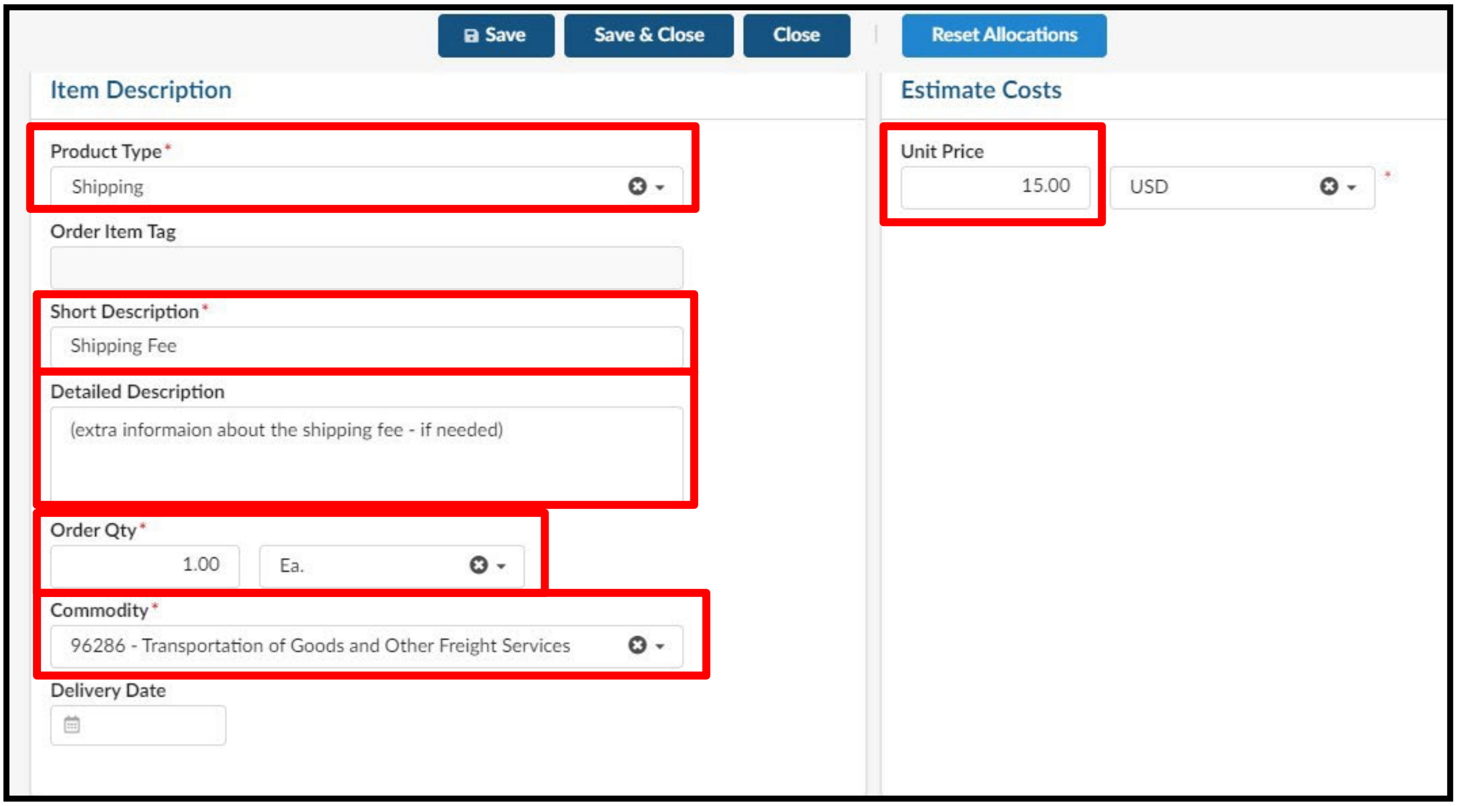
1. From a Requisition you have already started, under the **Items & Services** select the checkbox next to line item one and then select **Copy Selected Lines**.
    - This ensures any supplier information is transferred over to the new line item



2. Click the **pencil icon** to edit the copied line item



3. 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**



4. Set any necessary Allocations (*Department and Account codes*)