eVA eMall Manual

Purpose and Overview

eVA is a web-based Procurement tool that was designed for, and is used by all agencies in the Commonwealth of Virginia. The University of Mary Washington uses eVA to announce bid opportunities, invite bidders, receive quotes and place orders for goods and services.

The purpose of this manual is to provide information and instruction for the entry of purchase requisitions, the approval process and change orders.

This manual also provides information about selecting appropriate vendors, the relationship between eVA and Banner, and the relationship between eVA and the Procurement Card. These topics are discussed in the context of the eVA order process. Refer to the companion manuals listed on the cover for detailed information about these subjects.

UMW employees with the responsibility of making purchases on behalf of their departments should:

- Attend training on the Fundamentals of Finance before taking additional training or accessing financial systems. The Training, Evaluation & System Support (TESS) website contains information about available Finance training classes.

- Obtain training on and security access to eVA by attending the training class Purchasing with eVA and the SPCC and submitting the Delegated Purchasing Authority form and eVA Acceptable Use Acknowledgement form. A Training Calendar and copies of these forms are available from the TESS website.

- Submit a Purchasing Card Request form and Prospective Cardholder analysis. Forms are available from the Purchasing Department website.

- Obtain Banner Finance security and Budget Training, or designate a departmental Finance user responsible for understanding FOAPAL codes and reviewing your budget. Instructions and forms for obtaining Banner Finance security are available on the TESS website.

- Obtain Banner Finance security or designate a departmental buyer to complete Direct Pays. Direct Pay is used for purchases which are exempt from eVA and for which the vendor does not accept the SPCC. A list of exempt purchases is available on the Purchasing Department website.

Version 10

10/13/2016

Training, Evaluation & System Support

www.umw.edu/tess

Companion Manuals:

Small Purchase Credit Card Manual

Banner Receiving Guide

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SECTION I: Organization and Access

Introduction – eVA UnPlugged

eVA Unplugged shows you how to find the information you need before you log into eVA . The eVA Home Page, described below, and training materials written specifically for UMW buyers will help guide you through this pre purchase process. And, as you attend the hands on procurement training, the importance of the information will become clearer.

Please follow the links as you read to familiarize yourself with the materials and sites available to you. Let's get started by reviewing the eVA Home Page.

To get to the eVA Home Page - Log into http://eva.virginia.gov/

The eVA Home Page communicates with vendors (those we purchase from), buyers (state personnel with purchasing responsibilities, such as yourself), state residents, and legislators. eVA uses a web portal to bring diverse information together for a multitude of procurement and state regulatory needs.

Navigating the eVA Home Page

After the campus eVA training, you will receive an eVA Security letter informing you of your eVA username and password. These will be used in the eVA **Buyer Login** section.

The top bar of the Homepage contains quick links to address various constituent concerns.

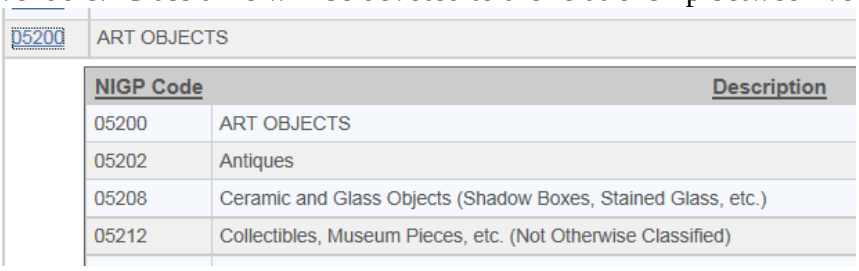
Select the *I Buy For Virginia.* This link addresses manuals, policies, and regulations pertaining to governmental purchasing. Take a moment to open the APSPM to get the feel for the regulations UMW Procurement Services must follow for state compliance.

Following the APSPM is the "Buy IT" Procurement Manual. The university purchases monitors technology purchases and guides you through this process through an internal web form that you will be shown in class.

Scroll down to the bottom of the page to the blue section containing various links to information and resources. Select *eVA Vendors*.

Specific laws must be followed to procure goods and services in Virginia. The eVA Vendors listing is an important source of information for you concerning proper vendor selection, payment tools, and ordering method. In time, you will become very familiar with those with whom you do business. Use the back arrow to return to the eVA Buyers page. Under *Resources*, select *NIGP Code Lookup*.

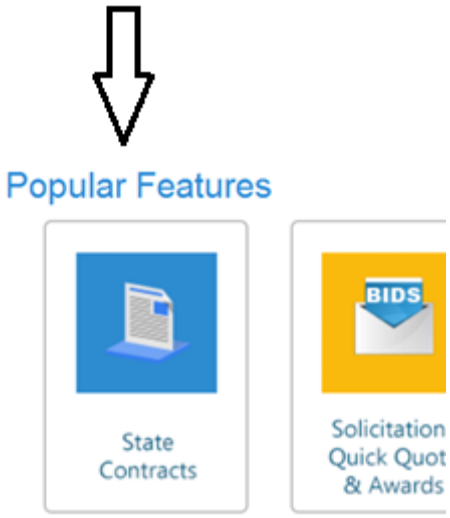
NIGP codes will be used by you when searching for particular goods and services offered by state vendors. Class time will be devoted to the relationship between vendors and NIGP codes.



05200 ART OBJECTS

NIGP Code	Description
05200	ART OBJECTS
05202	Antiques
05208	Ceramic and Glass Objects (Shadow Boxes, Stained Glass, etc.)
05212	Collectibles, Museum Pieces, etc. (Not Otherwise Classified)

Arrow back or use eVA Home and return to the Homepage. Scroll down to the *Popular Features* and select *State Contracts*.



In training, you will learn that contracts are a valuable (and sometimes mandatory) source of supplies, materials, or services. You will find it necessary to search for state contracts to determine if one exists to meet the needs of your department. While the initial search may take some time, the convenience of a saved contract will be beneficial in terms of costs and quality of services rendered.

Select *State Contracts* and type office supplies within the Search For field. Your results should be similar to the one below:

Contract Number	NIGP	Description	Contractors	Restriction	Contract Type	Ends	Buyer
6150402-13 Attachments: 4	Multiple Commodities	OFFICE SUPPLIES	GUY BROWN PRODUCTS FORMERLY CONCERTO SM OFFICE DEPOT INC OFFICEMAX INC	State / Localities	Optional	7/16/2014	Kirby Battle
VIB-72845 Attachments: 3	62000	Writing Instruments and Other Office Supplies	VA INDUSTRIES F T BLIND	State / Localities	Mandatory Source	2/28/2015	Christine Nichols

Column Header Descriptions

NIGP: This code stands for the National Institute for Governmental Purchasing. NIGP codes define (at a very high level) a good or service that is provided by the vendor.
Description: The description is related to the search criteria and matches the NIGP code.
Contractors: A party to a contract, a vendor who agrees to provide goods or services to the state agency, such as UMW.
Restriction: This column identifies who can use the contract. When State & Locality is shown, as in the example above, the University is allowed to use such Contractors. Contracts that limit services to certain agencies would include UMW as a named user if they UMW is a permitted Contractor.
Contract Type: Defines if the contract is a mandatory or optional contract.
Ends: The date the contract ends.

State contracts may carry restrictions; meaning they can only be used by certain state agencies; or they may be available to all. It is important to understand the information returned to you from your searches, and rest assured that the Procurement Department will always assist you with contract questions

University contracts can be found on the Procurement website.

Return to eVA Home and with the Popular Features selections, choose
The SWaM certification program is administered by the Virginia Department of Small Business and Supplier Diversity ("SBSD") and is the Commonwealth of Virginia's effort to help **S**mall, **W**omen- **a**nd **M**inority-owned businesses do business with state government.

SWaM

Small, Woman & Minority Owned

Your immediate interest in SWaM is your requirement to purchase goods and services from a **small** vendor for each purchase under $5,000.00. This requirement is mandated by state law. You and the University will be audited to ensure compliance.

Select What is SWaM to read the regulations surrounding the certification program.

On the left side navigation bar, select SWaM Vendors Search to see options for searching for SWaM businesses:

Small, Women and Minority (SWaM)

The SWaM procurement program is a state initiative that was established to enhance business opportunities for **S**mall, **W**omen-owned, **a**nd **M**inority-owned businesses in the Commonwealth of Virginia. A SWaM business is a business that has been certified by the Virginia Department of Minority Business Enterprise and is listed in the SWaM business Directory

- To search for currently approved SWaM businesses, please click here.
- To search for SWaM application status, please click here.
- To view the SWaM business directory, please click here.

Close the SWaM window and use the back arrow to return to the eVA Homepage.

Under the Resources heading, select eVA Browser Optimizer. The eVA Optimizer can be run to alleviate issues between the Internet Explorer Browser and eVA.

Still have issues? eVA contact information can be found by clicking the Customer Care icon located at the top or bottom of the eVA Home screen.
The eVA Customer Care page provides phone and email information shown below.

CUSTOMER CARE

Customer Care can help with Browser setting problems or eVA system complications. You can also call or contact your eVA trainers, who will be happy to guide you.

eVA Customer Care

Hours of operation: Monday-Friday 8:00-5:00 EST, except major holidays.
CALL TOLL FREE: **866-289-7367 or 804-371-2525**
Email: eVACustomerCare@dgs.virginia.gov

Getting Organized- Questions to Ask Before You Buy

Before taking out the credit card to purchase or entering an order into eVA, you must first ask yourself (or your supervisor) a few basic questions such as those listed below.

Do you have permission to buy?

Some items are purchased through campus buyers. Letterhead and technology purchases are two examples. If unsure, contact Procurement Services.

Is the item over $5,000.00?

If the answer to this question is "Yes", contact Procurement Services before proceeding.

What funding source (FOAPAL) should be used? Are restrictions on the funding source? Do you have proper securities to make purchases using this FOAP?

Appropriate security forms must be signed and returned to designated offices before access to financial systems will be granted. Review the Chart of Accounts Terminology for information on FOAPAL descriptions and restrictions.

Is the item purchased from a mandatory source, or on State Contract? Do you know the contract number?

Information about State and University Contracts can be reviewed on the Procurement website and the eVA homepage. The Procurement Services department is available to assist with contract questions.

Are you using the correct system to place your order?

Most goods and services should be ordered through eVA, however, there are exceptions. Exceptions are listed on the Direct Pay Table and will be paid by check after you have completed a Banner direct pay form. (Please visit the Finance Training Calendar for Direct Pay training classes.)

If your purchase is Exempt from eVA and your selected vendor accepts the credit card, you may place the order directly with the vendor and provide your SPCC number via telephone.

Have you followed procedures for vendor selection? Is the vendor a small business vendor?

It is to the benefit of UMW if your selected vendor is registered to do business with the state of Virginia. Ask your vendors to register with eVA and contact Procurement Services at Procure@umw.edu for any type of vendor assistance.

Vendors may be certified by the Department of Small Business and Supplier Diversity (SBSD) as a small business. By Order of the Governor, agencies are directed to set-aside purchases for

fulfillment by these small business vendors. Review the Vendor Search Procedures for instructions on researching a vendor's eVA registration and SBSD certification status.

Does the vendor accept credit cards? Has the card been established in eVA Preferences?

If the vendor you select accepts the card, the use of credit card is mandatory for payment. For registered vendors, consult the eVA Vendor Look-Up to confirm card acceptance.

Consult the Small Purchase Credit Card manual for proper card use. When setting up your eVA account, enter your card information in the Preferences section. Instructions are available in Section IV of this manual.

Does the vendor accept electronic ordering?

The preferred ordering method for registered vendors is noted on the eVA Vendor Look-Up. Orders not accepted electronically will require your final approval and distribution to the vendor.

Sample image of eVA Vendor Look-Up.

Status	HQ	VendorID (Click for Details)	eMall Supplier Name (Vendor Loc. Std Name)	eMall Contact (Location Name)	Address 1	City	St	Zip	Small	Minority	Woman	Disabled Veteran	ESO	Accept Charge Card	Accepts Visa	Accepts Elect Orders
Active Self	Y	VS0000027994	1st American Home Health Care Svcs.	Alexandria Office	6216 A Old Franconia Rd.	Alexandria	VA	22310						Y	Y	Y
Active Self	Y	VS0000055738	1st and Fresh Catering	1st and Fresh Catering	1329 Kenilworth Ave NE	Washington	DC	20019						Y	Y	Y
Active Self	Y	VS0000067452	1st Capital Cleaning Services	Richmond VA	1126 Evergreen Ave	Richmond	VA	23224						Y	Y	N
Active State	Y	VC0000159268	1st Chain Supply	1st Chain Supply	797 W Commercial Ave.	Lowell	IN	46356						N	N	N

Does the vendor have a PunchOut catalog?

PunchOut catalogs are a means for vendors to make their online catalog available through eVA. Items ordered from a PunchOut catalog are managed differently from regular catalog and non-catalog orders. See Section III of this manual for details.

Is the vendor active with a Cardinal ID?

If paying by check the vendor must be active in Banner INB and have a Cardinal ID number. See Section II of this manual for details.

Do you need to pay a shipping fee?

Specific commodity codes exist in eVA for shipping. When used properly, this code eliminates the fee for both the vendor and the university. Please check with Procurement to verify that the correct code is being used.

Do you know how to receive the goods or services in Banner?

eVA orders not being paid using the SPCC are assigned Purchase Order numbers and routed to Banner. Receiving must be completed in the Banner system before payment can be made. eVA training includes instructions on Banner receiving.

This dual system process requires security and account set-up in both eVA and Banner. Visit the Training, Evaluation & System Support website for more information.

Do you know what to do with the vendor invoice if it is delivered to your office?

Invoices that arrive at your office should be date stamped the date you receive it, reviewed for accuracy and either filed with the procurement file for pcard orders, or sent to Accounts Payable for non pcard orders. Do not let invoices sit on your desk. Invoices received via e-mail should be forwarded to payables email at payables@umw.edu.

Vendor Search Procedures - Purpose and Overview

University buyers are responsible for procuring goods and services for their respective departments in accordance with all mandatory State and University procedures. This section is intended to inform departmental purchasers of their responsibility to select appropriate vendors for all small purchases either through the use of existing contracts or by selecting a certified SWAM "small" vendor.

These practices should be followed regardless of payment method.

This section provides information on the following topics:

- Mandatory contracts, optional State contracts and available University term contracts
- Requirements for the use of Small (SWaM) vendors
- How to verify a vendor's eVA registration status and accepted payment methods
- How to utilize #100-Vendor Data by NIGP Code report and SBSD report to identify SWAM "small" vendors
- Appropriate use of a non-SWAM vendor

Contracts

UMW Contract opportunites include:

- Mandatory Contracts - The Code of Virginia and the regulations set forth by the Virginia Division of Purchases and Supply require state agencies to procure certain goods and services from designated state contracts. A list of Mandatory Contracts is available on the Procurement Services Constracts webpage. If a mandatory source is not able to supply the goods you require, you must contact Procurement Services to obtain a release. All approved releases should be maintained in your Procurement/SPCC file.

- Optional State Contracts – In addition to the list of mandatory contracts, optional state contracts are available, through which you may be able to obtain the goods or services you require at pre-negotiated prices. A current list of Optional State Contracts is available at: https://logi.epro.cgipdc.com/External/rdPage.aspx?rdReport=Public.Reports.Report9008_Data
    - Additionally, some contracts are restricted for the use of select state agencies. The Procurement Department will be able to identify whether or not the University qualifies to procure goods from these restricted contracts.

- University Term Contracts – UMW has contracts for many goods and services for use by the University as a whole. The current list of University Term Contracts is maintained in the Contract Management System. For additional information regarding contracts, contact the Procurement Department.

SWAM Requirements

If there is no existing contract that meets your needs, you should take specific steps to try to procure the goods or services you require from a "small" (SWAM) business. The Commonwealth of Virginia mandates that state agencies *set-aside procurements valued up to $50,000 for SWAM "small" businesses.* Vendors who meet specific criteria are eligible to be certified by the Department of Minority Business Enterprise (SBSD) as a SWAM vendor.

Set-Asides for SBSD Certified Small Businesses		
Estimated Cost	Required Number of Bids	Procedure
Up to $5,000	1	Campus buyers must obtain one documented quote from a SBSD -certified Small vendor. Use of the Small Purchase Credit Card is required for purchases up to $5,000 if the vendor accepts Visa.
Over $5,000 to $50,000	4	Quotes must be obtained from a minimum of four SBSD -certified SWAM vendors. Contact the Procurement Department for assistance in obtaining quotes.

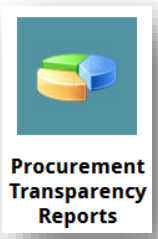
Vendor Searches

Procurement Transparency Report – SWaM Vendor Search

This report serves a dual purpose:

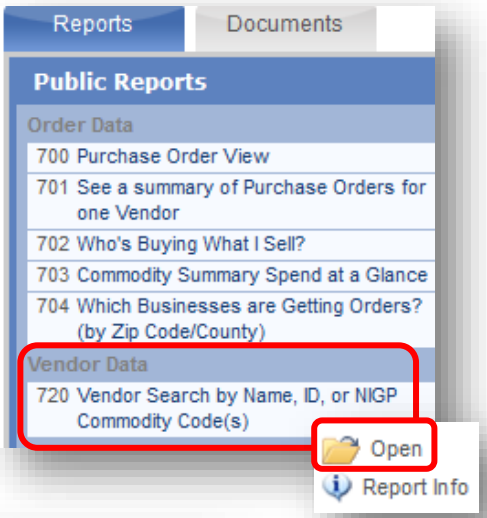
- ✓ Obtain SWAM and commodity details for a single vendor or,
- ✓ Obtain a listing of vendors registered for specific commodity code(s).

1. From the eVA homepage, scroll down to the middle of the screen to select the icon that says Procurement Transparency Reports

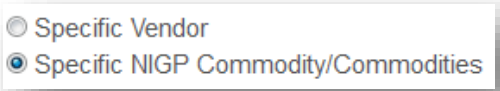


2. Under Vendor Data, Select 720 Vendor Search by Name, ID, or NIGP Commodity Code(s)

3. Select Open



4. Select Specific NIGP Commodity/Commodities.

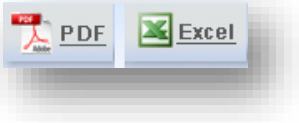


5. Enter the NIGP Code.
    - If you do not know the code, search using the NIGP Code Lookup link.

6. Select Run Report.
    - A listing of all of the vendors that have registered for the code you entered will be returned.

7. Select the "SWaM" column label twice to see all registered SWaM vendors at the top of the list.

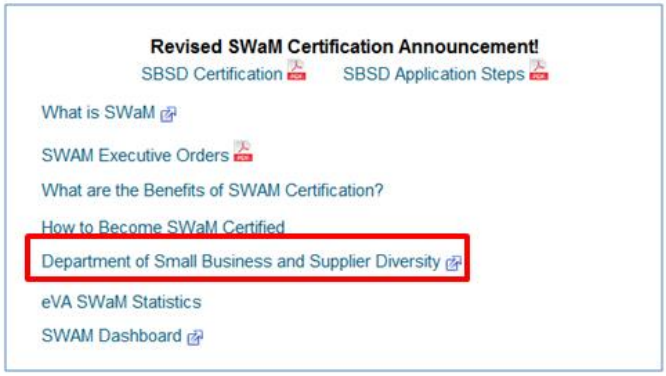
If you wish to export the list to Excel or a PDF, select the appropriate icon in the top right area of the page.



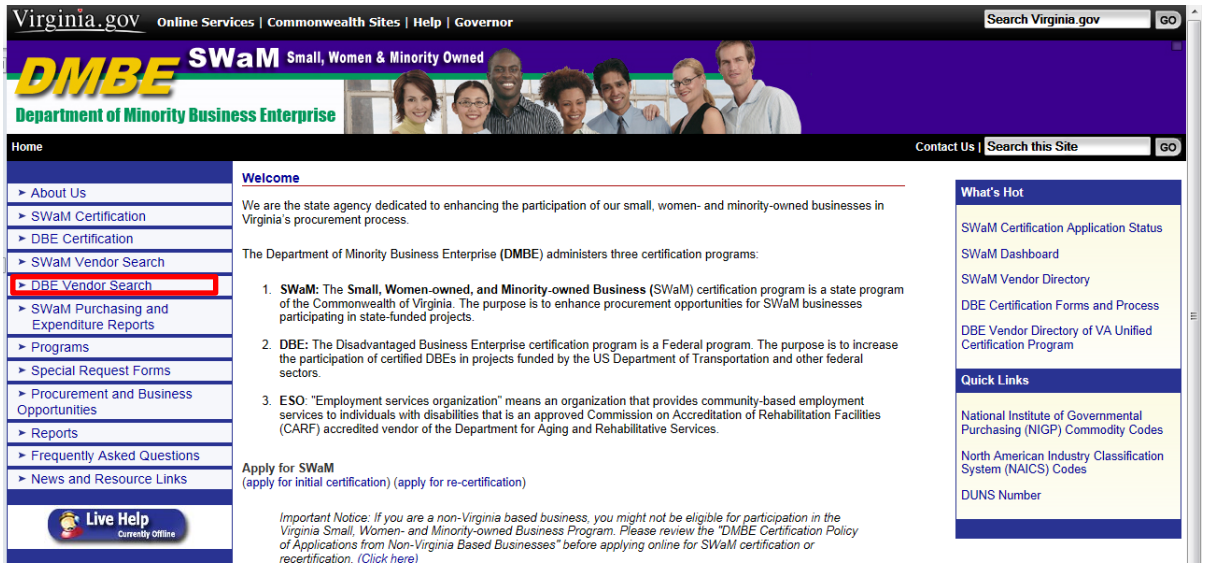
SBSD Vendor Search

If you are unable to find a specific vendor in the Procurement Transparency report that you belive to be SWaM certified, you can search DSBSD to verify. To access the SBSD website go to the eVA home page, click on the Small, Women and Minority Owned icon located in the center of the page.

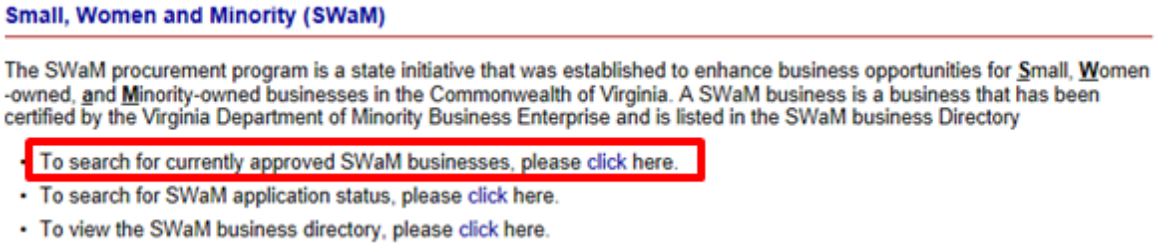
From the SWAM page click on the Department of Small Business and Supplier Diversity link.

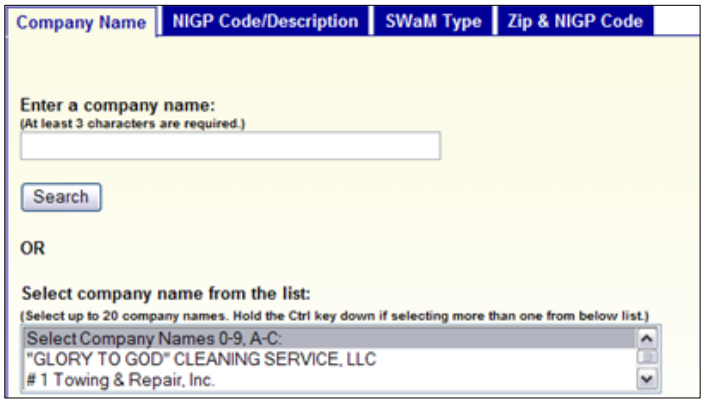


To search the Department of Minority Business Enterprise (SBSD) database for certified small businesses, visit the SBSD website at http://www.dmbe.virginia.gov/. Click on the SWAM Vendor Search link on the left side menu.



Select the first option to search for currently approved SWaM businesses





The SWaM Vendor Search box provides the following tab options for searching:

- Company Name
- NIGP Code/Description
- SWAM Type
- Zip & NIGP Code

To search by company name or any portion thereof, enter at least three letters in the search field and click on *Search*.

To search for vendors based on the commodity they sell, you may enter the full NIGP code or a portion thereof. To find your NIGP Commodity Code, please visit https://logi.epro.cgipdc.com/External/rdPage.aspx?rdReport=Public.Reports.Report9004_Data where you can either search by keyword or download the entire NIGP Code Book (detailed instructions available on page 13 of this manual).

You may also search by the commodity description, but be aware that the NIGP description may differ slightly from the search term you may use (i.e. photographic equipment instead of camera).

Once you have a list of SWAM "small" vendors, contact any one of them to request a quote for the goods or services you need. Proper documentation within eVA in the entire order comments section is "Small quote on file." Proper documentation in the cardholder's procurement file includes: name of the "small" vendor contacted, phone number, with whom you spoke, the date and response.

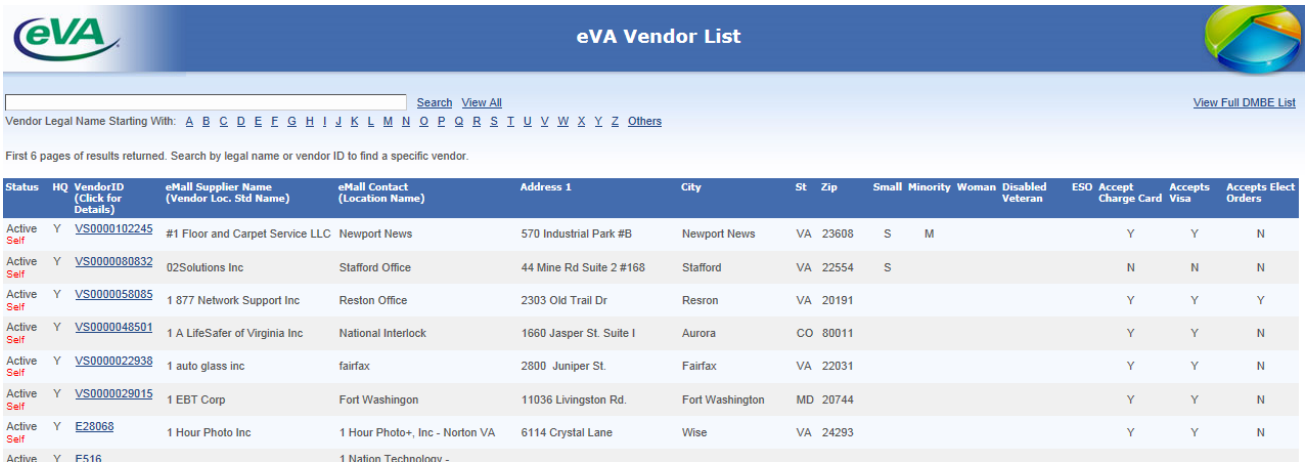
To determine if the SBSD registered vendor is also registered in eVA, review the eVA Vendor Lookup function on the following page.

eVA Vendor Look Up

Vendors holding state contracts will be registered in eVA. If the goods or services you require are not available through a contract but you are able to identify a potential vendor through other means, conduct a Vendor Look Up to determine if that vendor is registered in eVA. Not all small business vendors listed on the SBSD website will be registered; you may purchase from a small business vendor that is not eVA-registered.

A list of registered eVA Vendors is available from the eVA Home Page
Scroll to the bottom of the Home Page and select eVA Vendors.

An alphabetical list of eVA registered vendors will appear. You can either scroll through each page of vendors or search by the vendor's name or any portion of the vendor's name or address. It is recommended that you conduct a broad search then narrow down your options.



eVA Vendor List

Search View All View Full DMBE List

Vendor Legal Name 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

First 6 pages of results returned. Search by legal name or vendor ID to find a specific vendor.

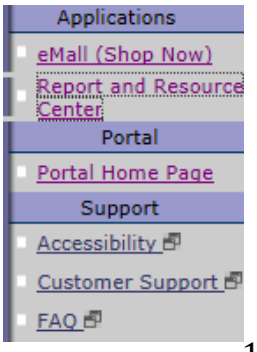
Status	HQ	VendorID (Click for Details)	eMall Supplier Name (Vendor Loc. Std Name)	eMall Contact (Location Name)	Address 1	City	St	Zip	Small	Minority	Woman	Disabled Veteran	ESO	Accept Charge Card	Accepts Visa	Accepts Elect Orders
Active Self	Y	VS0000102245	#1 Floor and Carpet Service LLC	Newport News	570 Industrial Park #B	Newport News	VA	23608	S	M				Y	Y	N
Active Self	Y	VS0000080832	02Solutions Inc	Stafford Office	44 Mine Rd Suite 2 #168	Stafford	VA	22554	S					N	N	N
Active Self	Y	VS0000058085	1 877 Network Support Inc	Reston Office	2303 Old Trail Dr	Resron	VA	20191						Y	Y	Y
Active Self	Y	VS0000048501	1 A LifeSafer of Virginia Inc	National Interlock	1660 Jasper St. Suite I	Aurora	CO	80011						Y	Y	N
Active Self	Y	VS0000022938	1 auto glass inc	fairfax	2800 Juniper St.	Fairfax	VA	22031						Y	Y	N
Active Self	Y	VS0000029015	1 EBT Corp	Fort Washingon	11036 Livingston Rd.	Fort Washington	MD	20744						Y	Y	N
Active Self	Y	E28068	1 Hour Photo Inc	1 Hour Photo+, Inc - Norton VA	6114 Crystal Lane	Wise	VA	24293						Y	Y	N
Active	Y	E516		1 Nation Technology -												

Vendor Look-up field descriptions:

- Status- indicates if the vendor is Active and Self or State Registered
- HQ-Y or N indicates if the eMall Supplier Name is the legal vendor name
- Vendor ID – the number eVA uses to identify the vendor.
- eMall Supplier Name – the legal name of the company headquarters. In red underneath, the certified SBSD name.
- eMall Contact – the name of the local business under which the company does business.
- Address – the address that was provided to eVA at the time of registration. This may be a local business address or address for the headquarters of the company or its parent company.
- Small Business – the letter "S" will appear in this column if the business is SBSD -certified as a small business. Required for small business quote.
- Minority Owned – the letter "M" will appear if the business is SBSD -certified as a minority-owned business. May be M but must be small.
- Woman Owned – the letter "W" will appear if the business is SBSD -certified as a woman-owned business. May be W but must be small.
- Accepts Charge Cards – will either have a "Y" or "N" to signify if the company accepts credit cards as a payment method.
- Accepts Visa – will either have a "Y" or "N" to signify if the company specifically accepts Visa as a payment method.
- Accepts Electronic Ordering – will have a "Y" or "N" to signify if the company receives their orders electronically. If "N" is indicated, orders will route back to the user originating the eVA order for final approval and printing to send to the vendor via fax, mail, online or other means.

eVA Report and Resource Center – Report #100 Vendor Data by NIGP Code

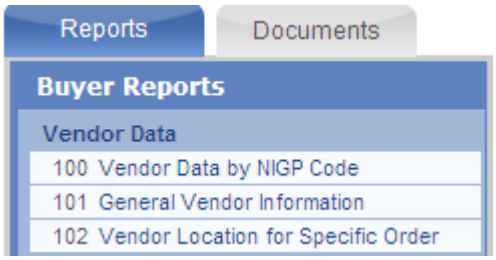
Within eVA, the Report and Resource Center holds many reports available for information purposes. The Vendor Data by NIGP Code report allows users to obtain a list of SBSD certified suppliers for a specific good or service by geographic region. The report can be printed, exported to Excel, or saved to desktop, if desired. The report will also provide a direct link to the Commonwealth's book of Commodity Class Codes (NIGP Commodity Codes) which will serve as a search aide.



This report can only be accessed by logging into eVA.

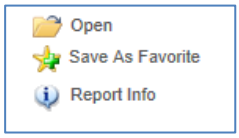
The Report and Resource Center, where all reports are found is located in the left navigation menu under Applications.

Vendor Data by NIGP Code is listed as the first Buyer Report in the Resource Center and is located in the left hand navigation within the Report and Resource Center.

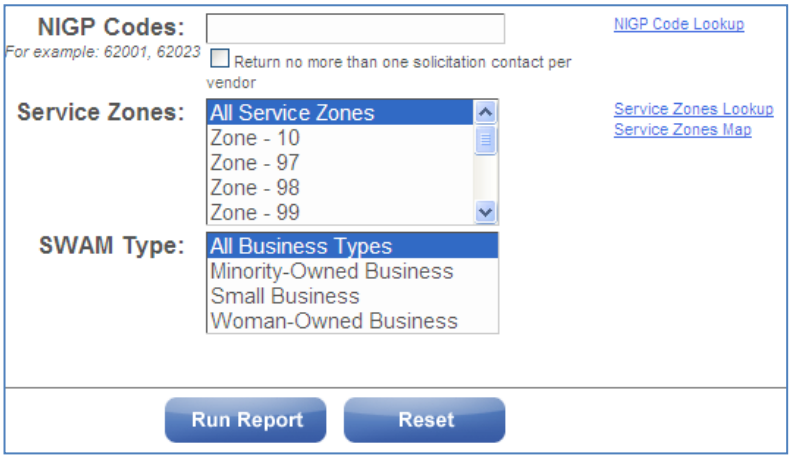


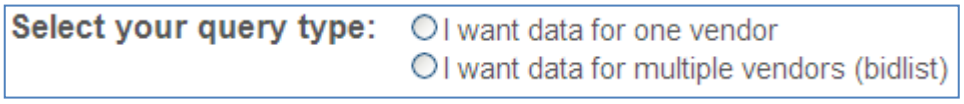
Select report 100 -Vendor Data by NIGP Code
Within the Reports tab are many specific reports.

This will open a pop-up with several options. Select Open to open this report.



Enter the NIGP code (s) and Service Zones, and SWaM types:





What to do with the Report Information?

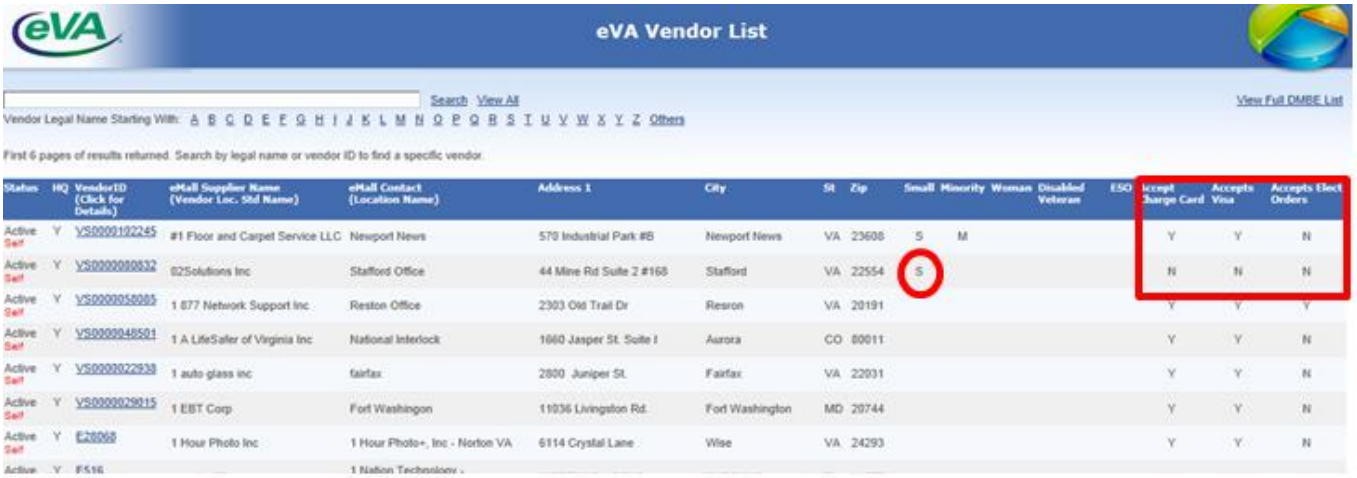
The Information you obtain from the report will be used to determine if a SBSD Certified Small Vendor(s) can satisfy the purchasing need. Review the list to determine if a supplier exists within the required service area or if the good can be delivered accordingly. It will be necessary to call the vendor and inquire on good, service, cost, delivery dates, and other requirements you may have as the Buyer.

Questions to ask the Vendor:

- Will the good or service be available when requested?
- Can the vendor meet the delivery date and time?
- Item or service cost? (use for eVA entry and to determine reasonableness)

- Can the vendor satisfy the quantity requirement?
- Is the need Brand specific?
- Does the vendor have a PunchOut catalog?

Save the information provided by the vendor as your small quote requirement. File within your procurement folder.



Status	HQ	VendorID (Click for Details)	eMall Supplier Name (Vendor Loc. Std Name)	eMall Contact (Location Name)	Address 1	City	St	Zip	Small	Minority	Woman	Disabled Veteran	ESO	Accept Charge Card	Accepts Visa	Accepts Elect Orders
Active Self	Y	VS0000102245	#1 Floor and Carpet Service LLC	Newport News	570 Industrial Park #B	Newport News	VA	23608	S	M				Y	Y	N
Active Self	Y	VS0000080832	02Solutions Inc	Stafford Office	44 Mine Rd Suite 2 #168	Stafford	VA	22554	S					N	N	N
Active Self	Y	VS0000058085	1 877 Network Support Inc	Reston Office	2303 Old Trail Dr	Resron	VA	20191						Y	Y	Y
Active Self	Y	VS0000048501	1 A LifeSafer of Virginia Inc	National Interlock	1660 Jasper St. Suite I	Aurora	CO	80011						Y	Y	N
Active Self	Y	VS0000022938	1 auto-glass inc	fairfax	2800 Juniper St.	Fairfax	VA	22031						Y	Y	N
Active Self	Y	VS0000029815	1 EBT Corp	Fort Washingon	11036 Livingston Rd.	Fort Washington	MD	20744						Y	Y	N
Active Self	Y	E28068	1 Hour Photo Inc	1 Hour Photo+, Inc - Norton VA	6114 Crystal Lane	Wise	VA	24293						Y	Y	N

Vendors must be set-up with a "Yes" in both the "Accepts Visa" and "Accepts Electronic Ordering" columns for credit card acceptance.

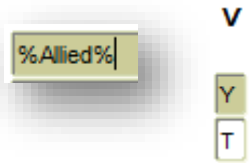
If you find a vendor in the Vendor Look-Up that has "Y" Accepts Charge Cards", "Y" for the accepts Visa column and "N" in the electronic ordering column (see #1 Floor and Carpet Service, LLC in sample above), you may still pay using credit card.

- Contact the vendor by phone to verify card acceptance
- Place the order using your card by checking the "Use PCard" box
- Select the "Confirming Order; Do Not Duplicate" box
- In the comments section state: "Order paid using credit card"
- Contact Training and System Support to cancel the Order in Banner

Verifying Vendors for eVA Orders Paid by Check

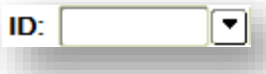
Vendors must be established in eVA and Banner and have a Cardinal ID in Banner prior to payment. To verify vendor information within Banner:

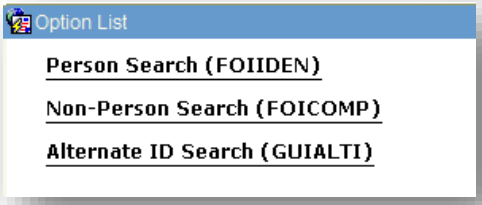
a. Search for the vendor in the Cardinal Verified Vendor Report, And/Or
b. Search Banner INB form **FTIIDEN**
    a. Enter search criteria in the Last Name Field
    b. Hit F8 to Execute Query
    c. "Y" in the "V" field indicates the vendor is Active
    d. "T" in the "V" field indicates the vendor is Inactive



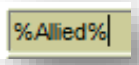
Search Banner INB form **FOAIDEN** for vendor information to verify Cardinal ID

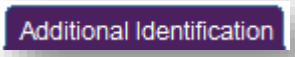
- ✓ Select the ID Drop down
- ✓ Select Non-Person Search

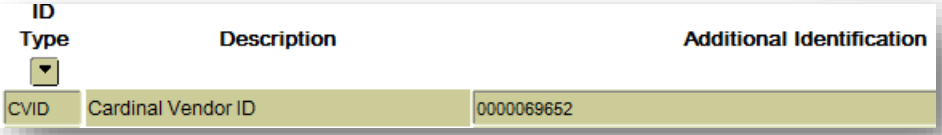




- ✓ Enter search criteria in the Name Field
- ✓ Hit F8 to Execute Query
- ✓ Double click on the ID of the correct vendor
- ✓ Select Next Block to populate the form fields
- ✓ Select the Additional Identification tab
- ✓ Verify the ID type of CVID







ID Type	Description	Additional Identification
CVID	Cardinal Vendor ID	0000069652

Vendors not listed on the SharePoint report or found in Banner must complete the Vendor Registration Information and Commonwealth of Virginia Substitute W-9 forms. Direct vendors to:

- ✓ Complete and sign the forms
- ✓ Send the forms back to you
- ✓ You will forward both forms to Accounts Payable.

If the vendor is identified as an Active Vendor in Banner without the Cardinal Vendor ID, contact Accounts Payable for assistance.

SECTION II: Unregistered Vendors

eVA Orders Paid via Check

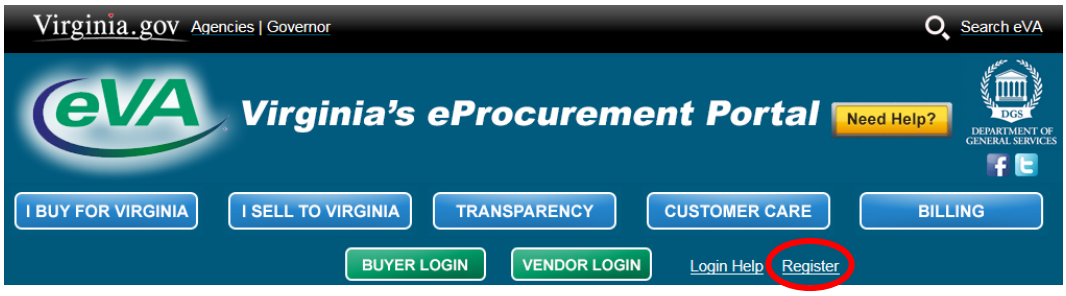
Vendors must be registered in eVA to complete payment. For vendors not registered in eVA, please complete the following steps.

- ✓ Vendors may Self Register
- ✓ Procurement Services can assist with the registration process
- ✓ Vendors are required to complete the:
  - Vendor Registration Information Form
  - Commonwealth of Virginia Substitute W-9 Form

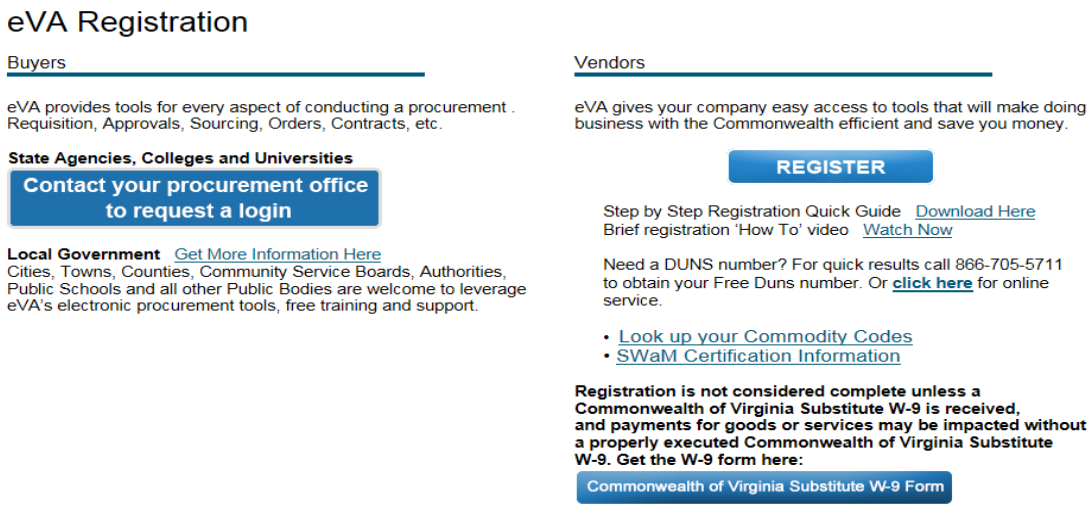
Vendors Self Register by the following steps:

1. Go to the eVA Home Page https://eva.virginia.gov/

2. Select *Register* at the top of the eVA Home Page.



3. For eVA Vendor Registration instructions, eVA has provided a Step by Step Registration Guide, which is available for download, as well as a Registration 'How To' video. For additional questions regarding vendor registration, contact Procurement Services.



If the vendor refuses to register in eVA and is being paid via check they must complete the Vendor Registration Information and Commonwealth of Virginia Substitute W-9 forms. Direct vendors to:

- ✓ Complete and sign the forms
- ✓ Send the forms back to you
- ✓ You will forward both forms to procure@umw.edu and payables@umw.edu

eVA Orders Paid via PCard

If the vendor refuses to register in eVA and is being paid via PCard, continue with eVA order via Ad Hoc procedures.

Direct vendor questions or concerns to Procurement Services.

Ad Hoc Vendors

In the context of eVA, Ad Hoc means that the vendor you are using is not listed in eVA for selection and vendor information must be gathered and manually entered onto a web form.

For Orders being paid by Check: Verify the Vendor is Active in Banner and has a Cardinal ID (instructions are listed in the section *Verifying Vendors for eVA Orders Paid by Check*)

Once vendors have been verified and/or appropriate forms have been received, gather the information listed below. This information is necessary to complete the eVA Ad Hoc form and correctly route the purchase requisition.

- Vendor Name
- Address
- Contact Person
- Email Address
- Telephone Number
- FAX
- Vendor Tax Identification Number (TIN)
- Tax ID Type - FEIN for Company or SSN for Individual
- Duns Number (optional)
- Organization Type –refers to values such as Corporation, General Partnership, Individual, sole Proprietorship and the like. If the person you are speaking to is unsure, there is a selection on the web form called *Undeclared* that can be selected.
- Payment method.

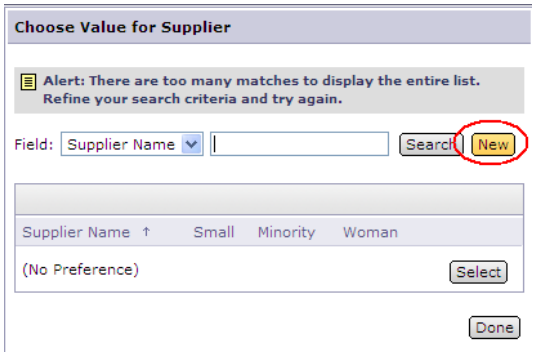
Begin a new requisition. Enter the title and leave the PCard box checked if the vendor accepts the credit card. Enter the PO Category "R01"and Procurement Transaction Type.

Click Next.

Select Create Non-Catalog Item

Enter the Description and NIGP Commodity Code for the item

Select the drop down menu for Supplier and select *Search for more…*



On the *Choose Value for Supplier* form, create a new entry by selecting the *New* button.

Enter the Vendor name and
'US dollars' for the *Preferred Currency*.

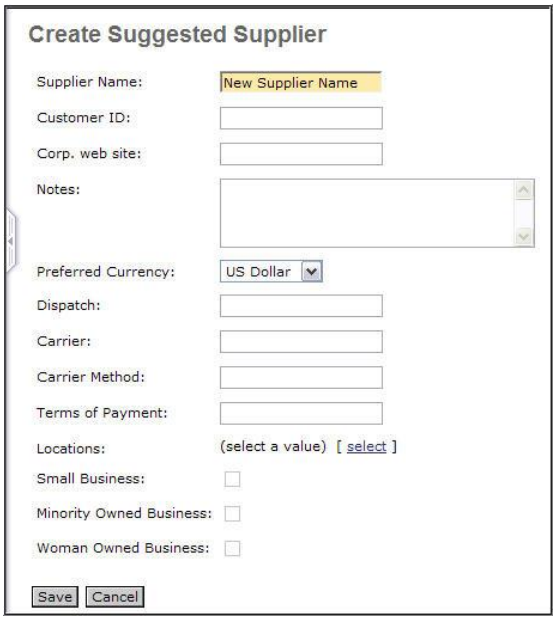
Leave remaining fields blank.

Click *Save*.

The Vendor name will be available in the *Choose Value for Supplier* form.

Enter the SBSD certified number in the *Notes* section.

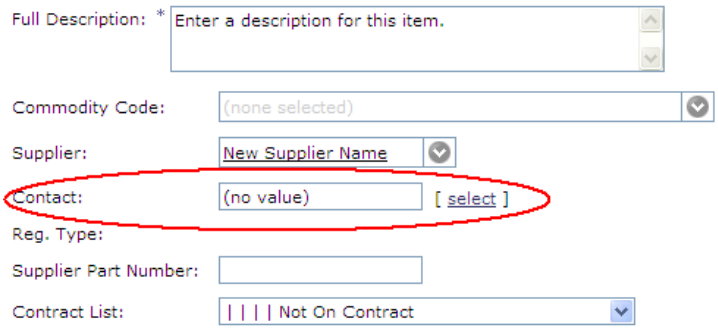
Once this Supplier has been saved as a Suggested Supplier, it is now available and may be selected as a Vendor.

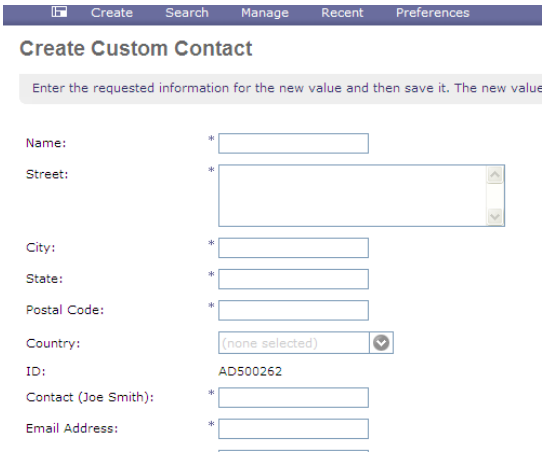


Click the Select button.

The vendor name will appear in the Supplier field within the Requisition.

It is now necessary to enter the specific vendor information you gathered earlier (address, phone, email..) to display within the Contact field. Click *select* to open the Create Custom Contact form.





The Create Custom Contact form is required before the Requisition can route for approvals. Enter the information gathered and save the form when the field entries are complete.

Foreign Vendors

If using a foreign vendor, contact Accounts Payable for assistance at Ext 1226 or payables@umw.edu. You will be asked to verify credit card acceptance. If they do not accept the credit card Accounts Payable will require the following information:

- Provide the company name, address, phone number, fax number, as well as email address so that Accounts Payable can obtain a W-8BEN from the vendor/individual. The vendor registration application or a W9 CANNOT be used for foreign vendors.
- Is the purchase a good or service?
- Will the service be performed in the U.S. or outside of the U.S.?

Once Accounts Payable has verified the vendor has a U.S. Federal ID number we will provide it to the buyer. If they do not have a U.S. Federal ID number the following Tax ID number should be used 999999999. In some circumstance the payment may be reduced by 30% if the service is performed in the U.S. and the vendor does not have a U.S. Federal ID number.

SECTION III: Creating a Non Catalog Requisition

Step 1 - Log Into eVA

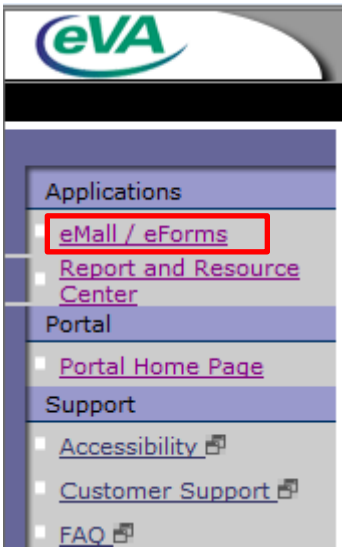
The eVA website address is: www.eva.virginia.gov

Log in to eVA using the username and temporary password provided to you by the eVA Security Officer. The first time you log in, you will be prompted to change your temporary password to a unique password.

You will be asked to change your password again every 90 days.

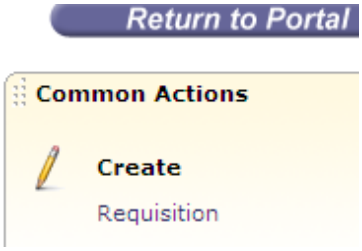
Usernames and passwords are case sensitive. Be sure to enter your username in all lowercase letters.

After successfully logging into eVA you will see the following menu on the left navigation bar.



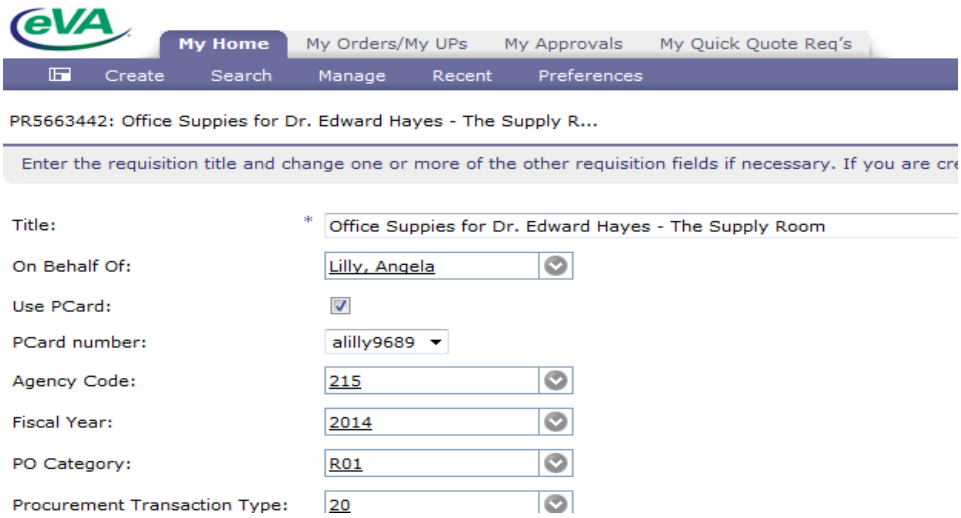
Once you have logged in, you will be directed to the Knowledge Center homepage select eMall / eForms, which is located in the left navigation menu.

Under Common Actions, select *Requisition* to begin a new order.



Step 2 - My Home and Summary Tab

The Requisition Summary Tab displays basic information about the order. Title the order to allow easy searching for you and the procurement buyers, who approve all orders. It is recommended you insert the vendor name in the Title field.



Field Definitions:

Title: Type an identifying title of your choice including the vendor name for procurement to easily identify the vendor. This title and the Purchase Requisition (PR) number assigned by eVA will appear in your Approved folder.

On Behalf Of: This field will default to your username. Design Services, Information Resources or Procurement may use this field when making a purchase on your behalf. If this option is chosen by one of the University Buyers, the order will appear in your Watch Requests folder instead of your Approved folder. You are responsible for Receiving orders placed on your behalf if necessary. Discuss Change Orders with the University Buyer prior to submission. (See Section V: PCard Orders Placed on Your Behalf for more information.)

Use PCard: This field is checked by default and will not appear until you have set up your SPCC in the appropriate Preferences menu. Check the vendor's SPCC acceptance when researching their eVA and SBSD -certified small business registrations. If the vendor accepts the card, you are required to use it for payment (Restrictions noted below).

PCard Number: Defaults to alias you created when establishing your SPCC in eVA.

Agency Code: Will default to 215.

Fiscal Year: Will default to the current Fiscal year. Fiscal years begin July 1 and end June 30. *Note: When copying orders from one fiscal year to the next, remember to update this field to the current fiscal year.*

PO Category: Unless otherwise instructed by the Procurement Department, the PO Category is R01. Change the PO category to X02 when entering requisitions to government agencies such as Virginia Correctional Enterprises (VCE), Virginia Distribution Center (VDC), Virginia Industries for the Blind (VIB), and Bureau of Capital Outlay Management (BCOM).

Procurement Transaction Type: Refers to the overall type of procurement.

When multiple Procurement Transaction Types are entered on the same requisition, choose the transaction type that matches the highest valued item. For instance, if you are ordering Equipment that is both Technology (for $500.00) and Non-Technology (for $250.00) select Equipment – Technology as the Procurement Type.

NIGP and Account selection and coding will remain on the individual line items, continue processing as usual.

How to Choose the Appropriate Procurement Transaction Type:

Procurement Type	Account Codes	Procurement Type	Account Codes
Equipment-Non Technology	7226x, 7227x and 7228x	Equipment-Technology	722X, 71279, 71279L
Supplies-Non Technology	713x	Supplies-Technology	71373
Professional Services	7124x, 71261	Non-Professional Services-Technology	7127x , exclude 71279 and 71279L
Non Professional Services Non Technology	7126x, excluding 71261	Construction	For Facilities Only
Printing	71215	Surplus	For Storeroom Only

My Labels: eVA provides label options for requisition tracking purposes. The label will not apply to the approved order. All labels appear in the side navigation area in requisition searches.

Click *Next* to continue, then select Create Non-Catalog Item to begin entering your items.

PCard Restrictions

Do not check the PCard box when using Fund 1117, or if using fund 1554 and the amount is over $5,000. Contact Accounts Payable for use of the Gold Card for purchases over $5,000 for fund 1554, or if you are purchasing from a Local fund and you do not have a Local pcard.

Do not check the PCard box when ordering from a vendor whose card acceptance information is not coded properly in the eVA Vendor Look-Up. Vendors must be coded with a "Y" in both the Accepts Charge Cards and Accepts VISA columns for the order to be submitted with the PCard box checked.

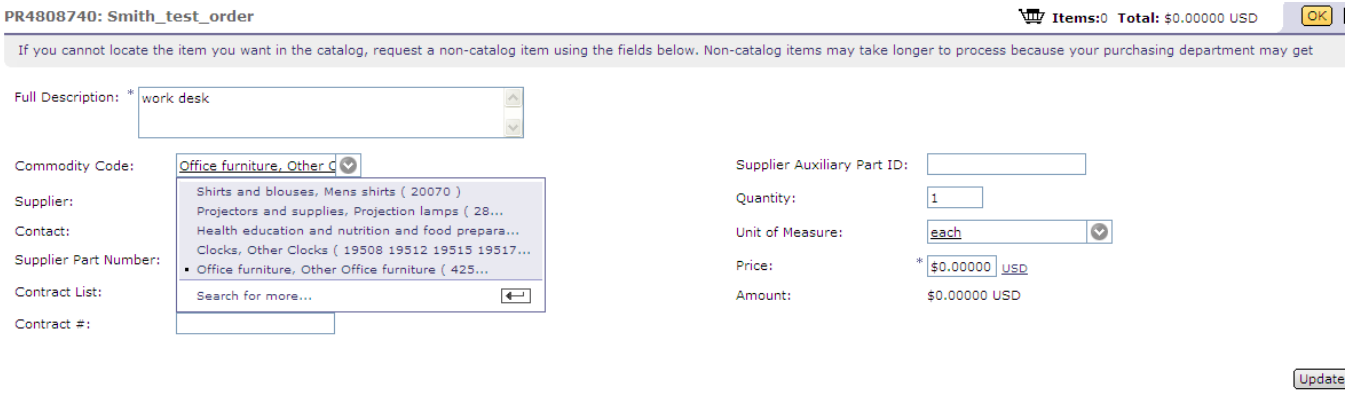
Status	VendorID (Click for Details)	eMall Supplier Name (HQ Legal Name)	eMall Contact (Location Name)	Address 1	City	St	Zip	Small Business	Minorit Owned	Accepts Charge Cards	Accepts Visa	Accepts Elect Ordering
Active	VS0000040359	1st Tuesday	Virginia Office	1475 Willow Lake Drive	Charlottesvill	VA	22902			Y	N	N
Active	E78785	2/90 Sign Systems	2/90 Sign Systems-Grand Rapids, MI	5350 Corporate Grove Blvd. SE	Grand Rapids	MI	49512			Y	Y	Y

If you find a "Y" in one column and "N" in the other, follow these steps to pay with your SPCC:

- Confirm by phone that the vendor accepts the card
- Place the order by phone and provide the vendor with your card number
- Reconcile your order online in WORKS and "signoff"
- Submit the order in eVA with the PCard box unchecked and with the "Confirming order; Do Not Duplicate" box checked.
- Note in Comments Section: "Order paid with the credit card".
- Notify Training, Evaluation & System Support (TESS) to cancel the order in Banner.

Step 3 - Add Items

Full Description: Enter a description of the item being ordered using key words first. Supplement the Description box with as much information as necessary to inform the vendor of the type of good or service you wish to procure such as size, color, dimension, exact service needed etc.



Commodity Codes

A commodity code is a number and description developed by the National Institute of Governmental Purchasing (NIGP) to identify the type of goods or services you are ordering. A searchable list of all commodity codes is available on the eVA home page by clicking on the NIGP Code Look-Up link.

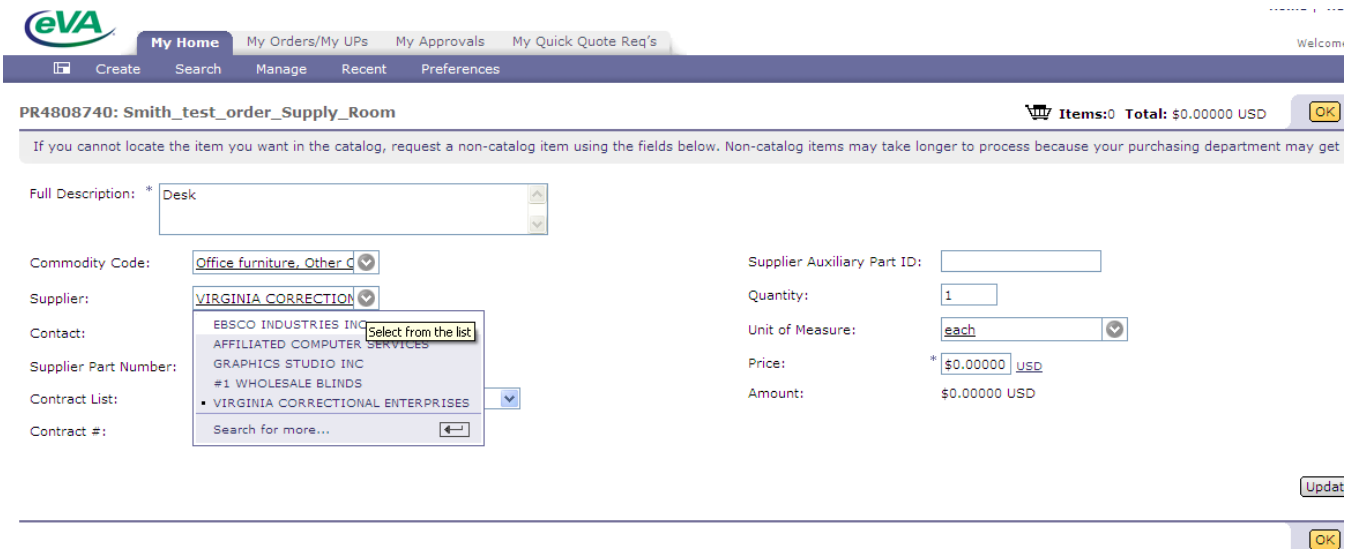
The drop-down menu will store recently used codes. To search for other codes, click on "Search for more" and the following screen appears:

Type the name of the desired item in the Field Name box and select the Search button.
Tip: Use general search terms first then add more descriptive words to your search if too many results are returned.

Shipping Commodity Code

Use Commodity code 96286 (freight) for Shipping Charges. The commodity code does not apply eVA fees to the vendor or UMW for the costs associated with shipping.

Add Supplier and Contact



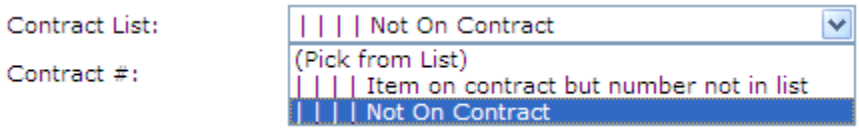
Supplier: The supplier (vendor) search is similar to the commodity code search. The drop-down menu stores the last 5 suppliers you have selected. Click *Search For More* to search for additional vendors. Enter all or part of the vendor's legal name and click on the Search button. Click Select next to the vendor's name.

Tip: If you enter the vendor's full legal name and no results are returned, try entering only the most unique word of the vendor name and re-submitting the search.

Contact: When the supplier name is selected, the Contact field will be pre-filled with the vendor's registered contact information. Vendors may register more than one contact address. If more than one address exists, the field will remain blank and you should click on *Select* to the right of the field to choose the correct address.
Note: Only eVA registered vendors can be retrieved with this search.

Add Parts Contracts and Quantity

Supplier Part Number: This optional field may be used for part number, stock number, or catalog number.



Contract List: This is a mandatory field when procuring from a mandatory or optional contract. UMW does not store contract information in eVA. From the drop down, select *Item on Contract but number not in list.* This action displays a Contract # field allowing for contract number entry.
Supplier Auxiliary Part ID: This optional field may be used if a secondary part number is required.

Quantity: Enter the numeric quantity.

Note: Dollar values may be inserted as the quantity when paying invoices down by price over time. If you have questions about this process, contact Procurement or TESS for assistance.

Unit of Measure: Units describe how the good is packaged (i.e. each, dozen, case). The drop-down list stores recently used units. Click on *Search For More* and follow the steps described for Commodity and Supplier to choose alternate units of measure.

Price: Enter the <u>price per unit of measure</u>. Click on Update Total to calculate the total cost of your line item.

Select *Update Total then click OK* to continue. Select Next, to add accounting details to the order.

Step 4 - Add Accounting Details

FOAPAL Values - To begin, select *Edit*

FOAPAL information must be selected from a list by clicking the *Select* link to the right of each value. Fund, Org, Account and Program are required. All other fields are optional. When complete, select *OK*, then *Next* to return to the Summary tab.
Note: If the FOAPAL codes do not appear in the list or eVA produces an error message stating that the code does not exist, your Banner and eVA security profiles may need to be updated. Contact Training, Evaluation & System Support for assistance.

Special Funding Requirements

Verify that the UMW Finance Card is used for local or agency funding sources only. The UMW Finance card may also be used for single transactions that share both state and local funding sources. Call Training, Evaluation & System Support (TESS) or Accounts Payable with questions on appropriate card use and funding source.

Some Funding changes require Program changes as well. Double check the Fund and Program Code alignment.

If you are using Fund 1117, make sure you know the ETF tracking number. This number must be included in the eVA Comments section. Always use an Account code beginning with a 72 and ending in the letter "F" since purchases using Fund 1117 are tracked as Fixed Assets regardless of dollar value. Do not use credit cards when making purchases with fund 1117.

If you are using an Account Code beginning with 72 (Equipment), make sure you understand the relationship between the cost of the item and the 72 code you are using. Contact the Fixed Asset Accountant in Finance for assistance.

Pre Pay Requirements

If you are purchasing pre pay items (i.e. service contracts, etc.) you must include the dates of service in the line item description. The dates of service should appear in the following format: "07/08-09/08" or for a full-year membership, "07/08-06/09". The terms annual, monthly and yearly are not acceptable dates of service since they do not clearly identify the beginning and end of the term covered by the pre pay item.

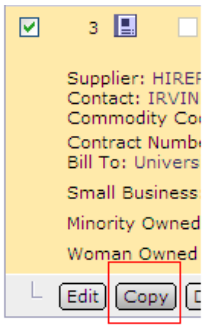
For a complete list of pre pay items, see the Accounts Payable website.

Summary Tab

The Summary tab shows information that related to the order as a whole (such as shipping, comments and the ability to add attachments) allows for final review of items, the ability to copy or mass edit item information.

Copy and Mass Edit

Copy and Mass edit allow information on line items to be copied and /or edited line by line, or as a group. This is helpful when applying FOAP or basic item descriptions to more than one item.



Select the line item(s) you wish to copy by checking the box to the left of the item, then select the *Copy* button.

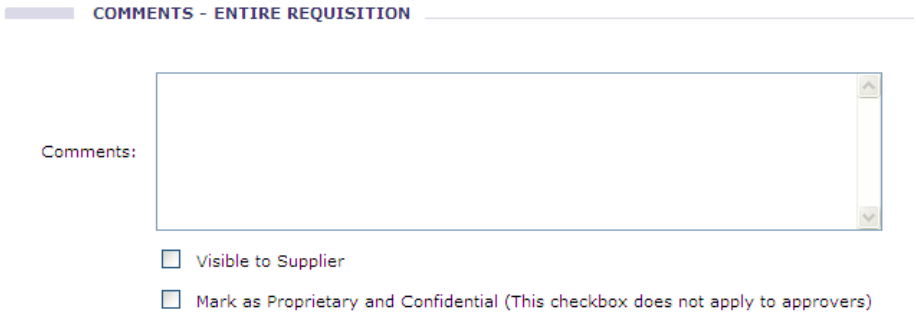
To Edit in mass, select the checkbox found at the top of the line items.

Shipping, Delivery and Need By

Ship To: This field defaults to the location defined for your assigned Buysense Org (BSO) group. You may choose any *Ship To* address under the drop down menu. Contact TESS for assistance updating this information.
Deliver To: This field defaults to your name, you may change if needed.

Need by Date: Click on the calendar icon to the right of the field to select a date.
Note: If your deadline is firm, contact the vendor directly to discuss their ability to fulfill the order in time.

Comments



Comments: May be added for either the entire requisition or by the line item. 255 character spaces are available.

Use the *Comments* section to document non- contract, non- small business purchases (Small business quote on file), or to note that the Vendor is certified as *Small*.

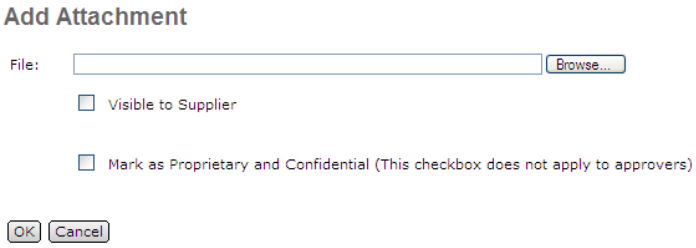
Comments can also be used for ETF tracking numbers, Sole Source and/or Proprietary notations.

Attachments

Add an attachment by clicking on *Add Attachment*,

Then browse for the file you wish to attach.

Note: The checkboxes beside "Visible to Supplier" and "Mark as Proprietary and Confidential" in the comments and attachment sections must be selected for the information to be visible to the Supplier and/or the information in these sections to be marked as Proprietary and Confidential.



How to include Private and Supplier Comments on the Same Order

Line item comments can be used to include both public comments that can be viewed by the vendor and private comments to Procurement for small business documentation.

- Open an individual line item, type the comment to the vendor/Procurement in the comment box.
- To make the comment public select the checkbox "Visible to Supplier".
- Do not select this checkbox if you do not wish the Supplier to view this comment

Comments or attachments made on the entire requisition may also be marked as public or private.

- From the Summary Tab of the order, scroll to the Comments – Entire Requisition section. Enter the comment/attachment and select the checkbox to mark this comment/attachment as "Visible to Supplier".
- Click the Exit button then click on Save.
- Open your Composing folder and click on the PR number of the order you just saved.

Small Business Documentation

All eVA orders placed with a vendor that is not on a contract or not certified as a small business vendor must have a small business quote on file. "On file" means that the quote needs to be available in your procurement file and/or attached to the purchase order.

Checkout Review

Review your requisition and, if necessary, edit requisition prior to submission. Below are just a few items to review before submission:

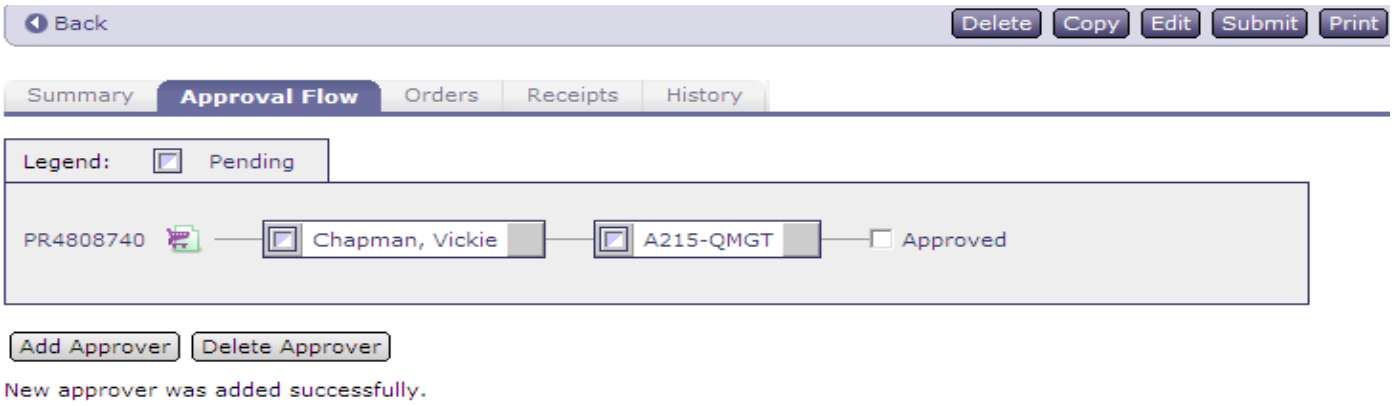
- Did you use the correct FOAPAL?
- Did you enter the correct Fiscal Year?
- Did you enter a Delivery Date?
- Is the PCard box checked if paying by credit card?

- Have you included the Contract number if applicable?
- Have you entered the tracking number and correct Account number for ETF orders?
- Have you entered an Account code with the suffix "F" for Fixed Asset orders?
- Have you placed your small business quote in your purchasing folder if ordering from a vendor that is not either small business-certified or on contract? Small Business quotes may also be attached to the eVA requisition.
- Have you placed a notation in the Comments section indicating that your vendor is certified as Small or that your small business quote is on file?
- Are Confirming Orders identified? See Section IV.
- Did you include any releases for items that are on contract?

Once the order is complete and accurate click ***Submit***. The order status will change from *Composing* to *Submitted* and will route for approval.

Step 5 - Approval Flow

The Approval Flow tab of the order shows the step by step Requisition route. You may add additional approvers or watchers to the order.

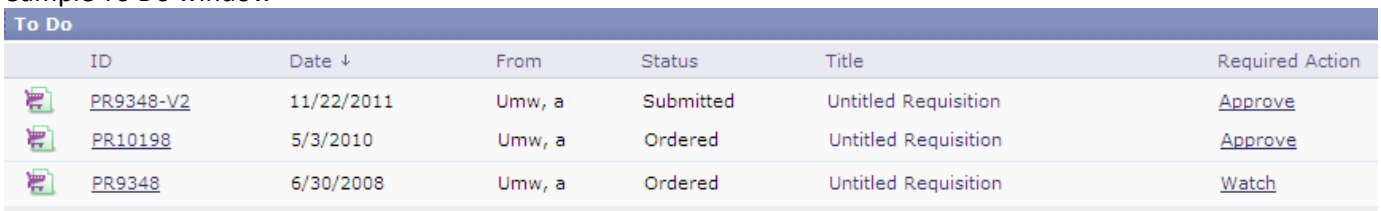


If the vendor does not accept orders electronically, you will be inserted into the workflow as the final approver. This is a reminder that the order(s) must be printed and faxed or mailed to the vendor. Remember to NEVER write down your credit card number. Call the vendor with your credit card number or purchase online.

To Do List

Orders that require you to do something such as *Watch* or *Approve* will be listed in the To Do section of your *My Home* tab.

Sample To Do window



To Do

	ID	Date ↓	From	Status	Title	Required Action
	PR9348-V2	11/22/2011	Umw, a	Submitted	Untitled Requisition	Approve
	PR10198	5/3/2010	Umw, a	Ordered	Untitled Requisition	Approve
	PR9348	6/30/2008	Umw, a	Ordered	Untitled Requisition	Watch

Select the PR number to review the purchase Summary Tab information.

Approve or deny the order as necessary.

Step 6 - Change Orders

After a requisition is fully approved and ordered, Change Orders may be necessary to add or correct information on the original order.

The most common causes for changes are:

- The eVA total is greater than or less than the actual invoice
- Additional items are required or existing items are no longer needed
- Comments should be added (Previous comments cannot be deleted)
- The Purchase Order Category field is incorrect
- The PCard field is checked or unchecked incorrectly

To begin, log into eVA and select eMall (Shop Now).

To make a change to a submitted order, you must search for the PR number associated with this Purchase Order.

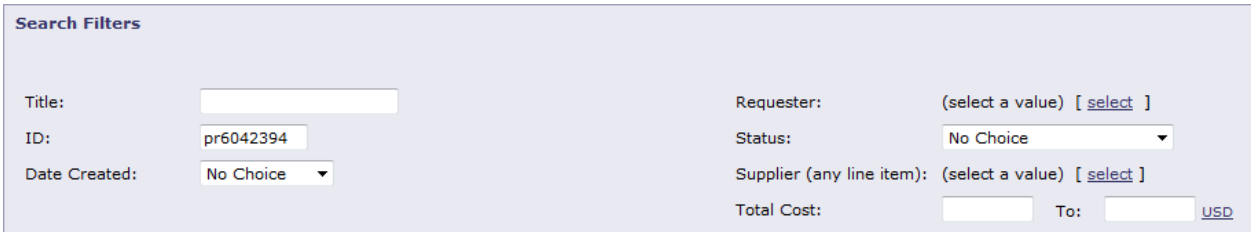
To find the PR number that is associated with a previously submitted order, go to My Documents, which is located at the bottom of the My Home page.
Record the PR number associated with the Order.

On the My Home tab, select Search to open the dropdown menu.

Select Requisition from the dropdown menu.

Open the Date Created dropdown to select No Choice.

Enter the PR number that is associated with the Purchase Order into the ID field.



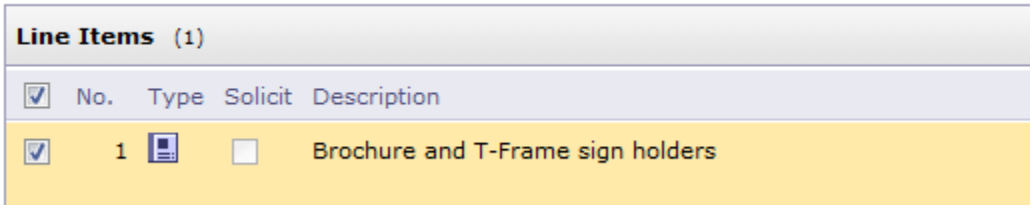
Click Search. Search Results will populate below.

Select the PR number ID to open the details of the Purchase Order

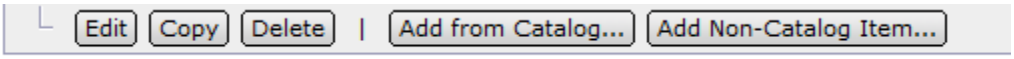
Click *Change*

to edit the contents of the Purchase Order.

Select the checkbox to edit line item details



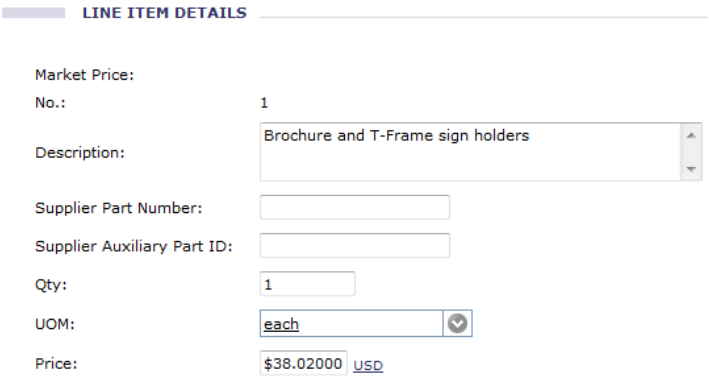
Click Edit to edit this line item.



Make necessary adjustments to the price or quantity of this item.

Select Ok to save changes.

When all changes have been made and the Purchase Order has been updated, click Submit.



Note: If an entire order is no longer required and was never ordered, ***Cancel*** *the order rather than submitting a Change Order.*

Reconciliation and Close Out of eVA Orders

When services have been completed and all items received, confirm the invoices paid are accurately posted on your budget. Then verify that the Banner amount is accurately reflected on the eVA order. Make any necessary eVA adjustments by completing a Change Order in eVA to reflect the actual amount paid.

Update Comments

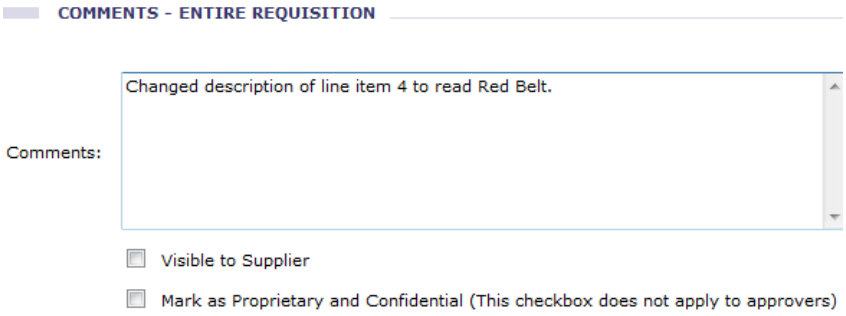
When a Change Order is done, enter a description of the reason for the Change Order in the Comments section to ensure all interested parties (i.e. approvers, System Support team, and vendors) understand the nature of the changes.

If you need to correct the price or add shipping for items you have already received due to differences on the invoice, select the checkbox "Confirming Order, Do Not Duplicate" and enter text in the comments section such as "Items Received. Do Not Duplicate" to avoid additional shipments.

If the change is for internal purposes only (i.e. changing FOAPAL elements, adding small business information) select the checkbox "Confirming Order, Do Not Duplicate" and enter text such as "Change Order for Internal Purposes Only. Do Not Duplicate" in the Comments section and select the checkbox to make comments visible to the supplier. Then enter a separate Comment, which will not be included in the Purchase Order, detailing the internal changes. For comments you do not wish to send to the Supplier, leave the "Visible to Supplier" checkbox unchecked. (See Section II, Step 4 for detailed information about adding Comments.)

Review your order and click Submit. A version number is added to the requisition number and the order is routed for approval.

Change Orders are fed into Banner the afternoon following final approval. Banner Receiving may need to be adjusted depending on the change.



Returns

Items for return may be due to damage, incorrect ordering, or buyer or vendor error. Shipping errors can only be addressed if the purchase was requisitioned and approved in eVA before the good was delivered and the term of goods and/or shipping charges were adequately stated on the Purchase Order.

Step 1. Call the vendor to determine the most appropriate manner in which to return the items. This can be done in one of two ways:

1. Pick Up
2. Pre-paid postage to send the merchandise back via UPS Call Tag or FedEx Call tag

Step 2. If the credit card was used, request a credit for the returned items(s).

Step 3. An eVA Change Order should be completed a soon as possible to reflect the quantity and price change of the Purchase Order.

Step 4. If the vendor is unwilling to accept the return, contact Procurement. Procurement will attempt to resolve the return with the vendor. If the vendor remains unwilling to accept the return,

Procurement, with assistance from you, will complete a Vendor Complaint Form and contact the Department of Procurement Supply (DPS). Once DPS has received the Vendor Complaint Form, DPS will contact the vendor directly to resolve the return dispute. DPS will inform the Procurement Director with the resolution of the issue.

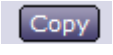
Returns due to Buyer Error
If you are returning items due to no fault of the vendor, the University could be charged additional fees (i.e. a restocking fee or be charged for any damage the return incurred). The vendor could also elect to not accept the return. Follow the Return procedure as outlined above, to include additional restocking fees on the eVA Change Order, if required.

Copying an Order

To copy a previously submitted order to utilize the same vendor information, or products ordered or to copy an order from one fiscal year to the next:

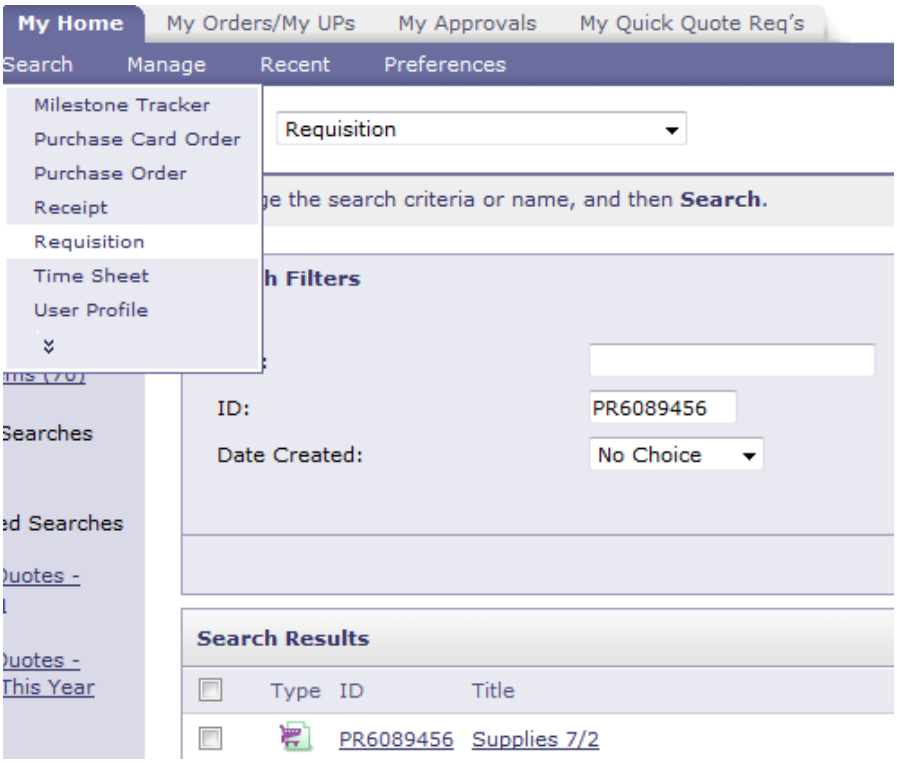
The order must be retrieved by searching for the Requisition you wish to copy.

In eVA click Search and Choose Requisition. Click on the order number from your search results.

Select Copy  from the menu options at the top of the Purchase Order.

This will provide an exact replica of the Purchase Order that was submitted.

The Title of the order will default to "Copy of (items originally ordered)" change this title to reflect description of the products



Select the current fiscal year from the Fiscal Year dropdown menu. Make any additional changes such as items, price or quantity that differ from the original purchase order.

SECTION III: Punch Out Catalog Orders

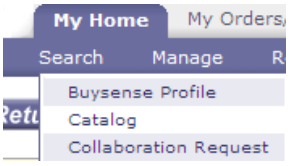
Some eVA registered vendors, including some with mandatory state contracts, have provided online catalogs to use within eVA. Goods selected from a PunchOut catalog are transmitted back to eVA with all information selected from the PunchOut catalog.

There are a number of ways to determine if a vendor has a punch out catalog:

From the eVA home page:
In the middle of the home page, select the number of catalogs shown on the eVA homepage to be directed to a list of available PunchOut catalogs.

From the My Home Search function, expand the search section by selecting the arrows at the bottom of the list of searchable items.

Or while entering the requisition.



On the Catalog Home page, select PunchOut Catalogs from the drop down option.

Type the name of the vendor and select *Search*.

Important information about this vendor is located to the left of the vendor name in the navigation menu.

Click the link under the vendor name, eVA will direct you to the PunchOut catalog site.

If you do not find items you would like to purchase, you may return to eVA by selecting Close PunchOut Catalog Shopping Session to the right of the black menu bar within the PunchOut Catalog shopping session.

After checkout, your selected items will appear as line items within the requisition and the vendor, contract and commodity information will be filled in.

Sample PunchOut Catalog Line Items

You cannot modify the quantity, unit of measure, price or description of PunchOut catalog items from your eVA order. To edit items, check the box next to the line item then click on *Edit*. You will be returned to the PunchOut catalog to make changes to your order.

You must complete checkout of the vendor catalog again for those changes to be effective in eVA.

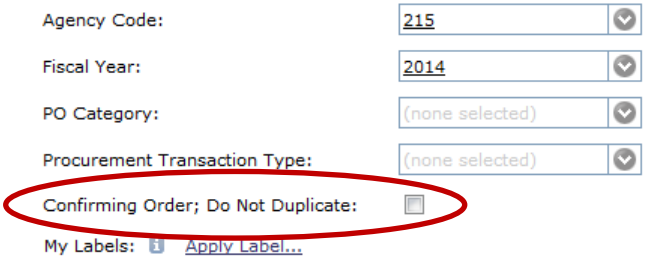
You may add other items to the same requisition regardless of whether they are added from another PunchOut catalog or as non-catalog items. Items of the same type going to the same vendor will be grouped together into a single order. You may have multiple orders for the same requisition if your order contains line items from multiple vendors or from both catalog and non-catalog sources.

Note: Credit card use is established for the entire requisition in the Title screen, not by line item, all vendors must have the same card acceptance status to be grouped into a single requisition.

SECTION IV: Confirming Orders

eVA should be the first point of entry for all purchases, but it is understood by the state of Virginia, that occasionally, individuals may find it necessary to enter an order in eVA after the fact. "After the fact" entries are termed Confirming Orders, as the order is entered in eVA after the good or service has been confirmed with the vendor (an Amazon order serves as a good example). Confirming Orders should be the exception and not standard practice.

For Confirming Orders check the "Confirming Order; Do Not Duplicate" box:



Confirming Orders and Credit Cards

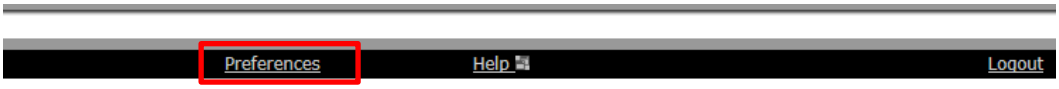
It is perfectly acceptable to enter the Confirming Order into eVA when paying by credit card. Make sure to check the Use *PCard box* and select the checkbox marked *Confirming Order; Do Not Duplicate* to avoid any duplication of service or payment.

Confirming Orders and Ad Hoc Vendors

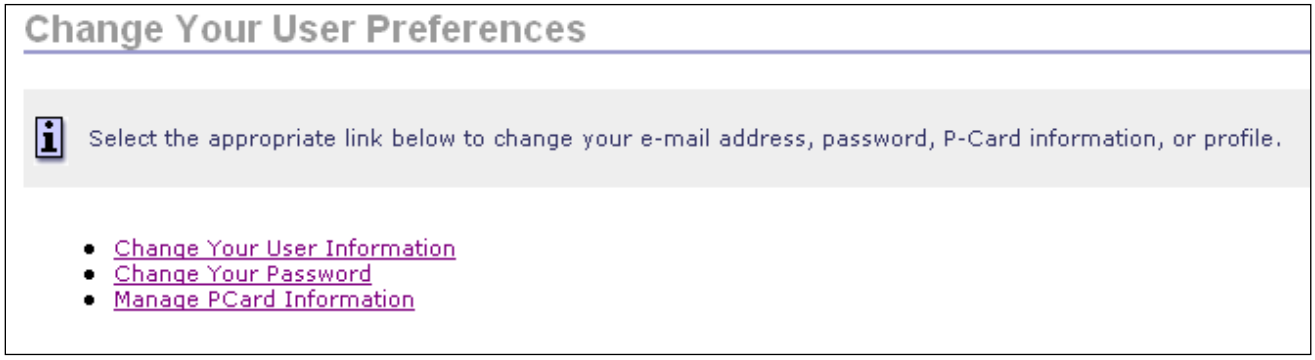
Confirming orders with Ad Hoc vendors follow the same procedures for non-Ad Hoc. Two considerations to keep in mind particular to the Ad Hoc are:
(1) Ad Hoc vendors cannot accept electronic orders. Make sure you approve the order in eVA and mail or fax the Purchase Order agreement to the vendor.
(2) You may use the credit card for Ad Hoc vendor payments. It is necessary to phone the credit card number in, as the vendor will not be able to extract the card number from eVA.

SECTION V: User Profiles

It is recommended that you review your User Profile Information for accuracy. Log in to eVA. Click on the Preferences link on the black menu bar located at the top of the Knowledge Center portal.

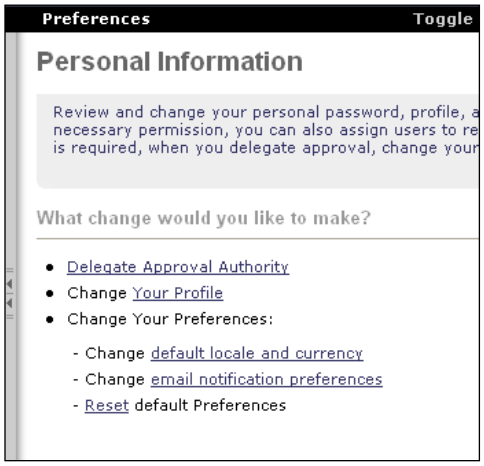


Select: Change Your User Information and verify that your telephone number and email address are correct.



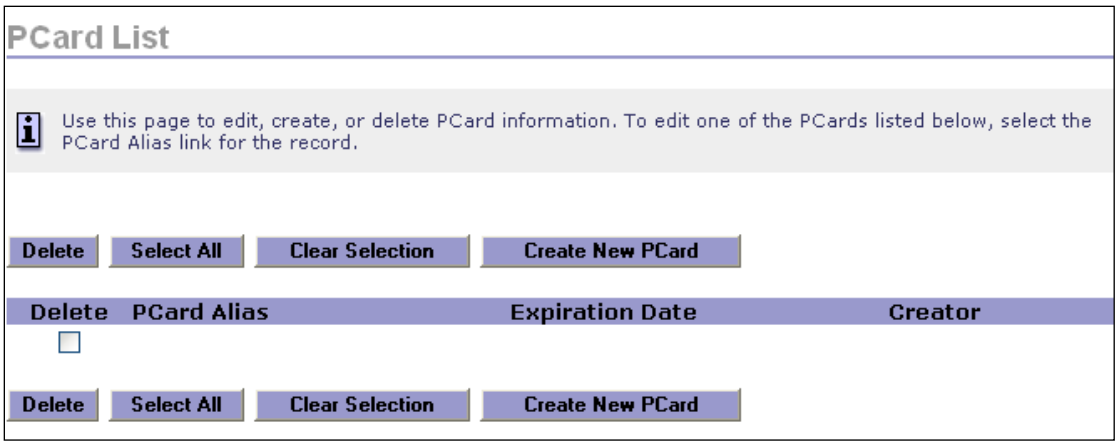
Ariba Messages

eVA sends notification messages via email each time action is taken on your order including when it is submitted, approved by any party in your approval flow and fully approved by all parties. These messages are useful for tracking the progress of your order. If you prefer to receive a single message containing all of the activity that takes place on your order in any single day, you can change your Notification Preferences.



To change the Notification Preferences, Log in and select Shop Now. Select Preferences, then change email notification preferences. In the Edit preference for drop down, select Requisition. You may then change the notification methods and frequency.

Do not set any of the categories to Never send notifications. Click OK to save selections.



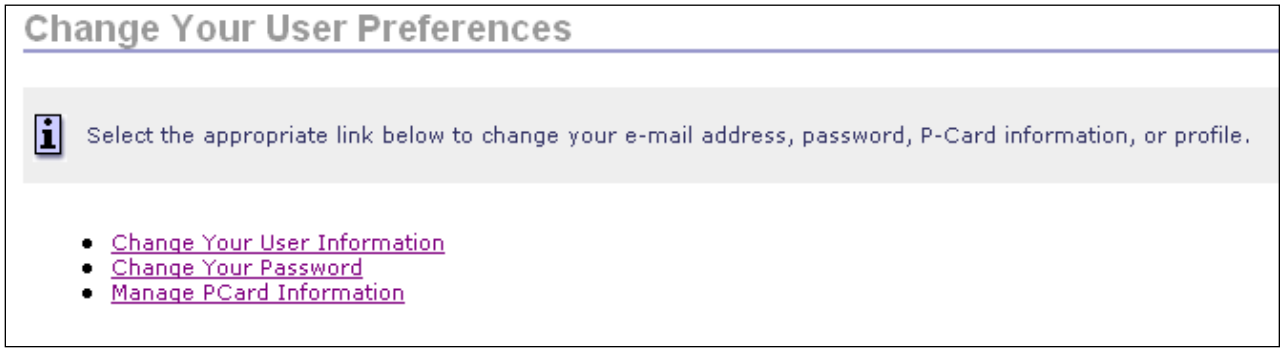
Sample of Personal Information found under Shop Now Preferences

Purchase Credit Card

Credit Card (P-Card) Profile

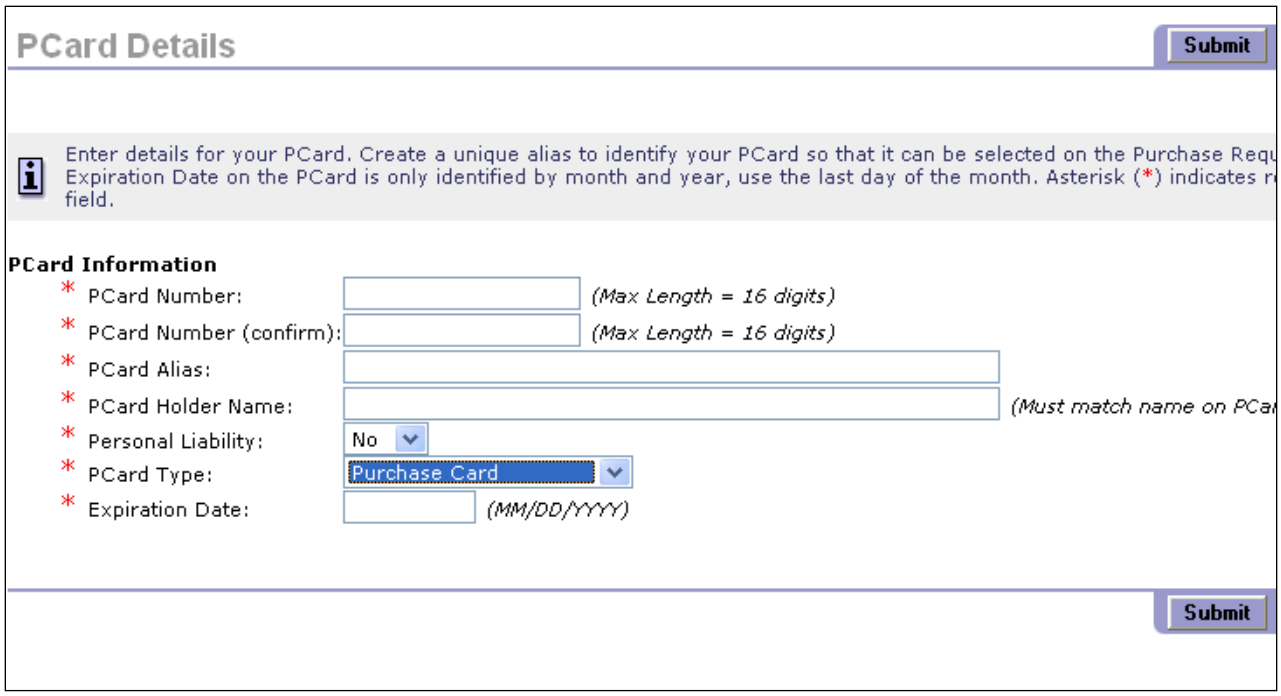
New eVA users must set up their credit card(s) in eVA before placing an order using the card. It will take 24 hours after you set up your card for it to become active in eVA.
Log in to eVA
Select Preferences from the top menu located on the Knowledge Center home page

Knowledge Center Preferences Menu



To enter your card information, click on Manage PCard Information.
Click Create New PCard.
UMW Policy states that you may only enter your own PCard information.

Enter the PCard information exactly as it appears on your card.



PCard Number: the 16-digit account number from the front of the card
PCard Number (confirm): re-enter the 16-digit account number
PCard Alias: enter an alias that will appear in place of the PCard number

Note: Your PCard information becomes encrypted when submitted. Only the PCard alias will be visible afterwards.

For the **SPCC**, the PCard alias should contain the first initial of your first name, your last name and the last 4 digits of your card number (i.e. vchapman3295).

When inserting the **UMW Finance Card**, the PCard alias begins with the last four digits of your card, your user id, then the word "Local".

PCard Holder Name: enter your name as it appears on the card
Personal Liability: No
PCard Type: Purchase Card
Expiration Date: Enter the last day of the month shown on your card.

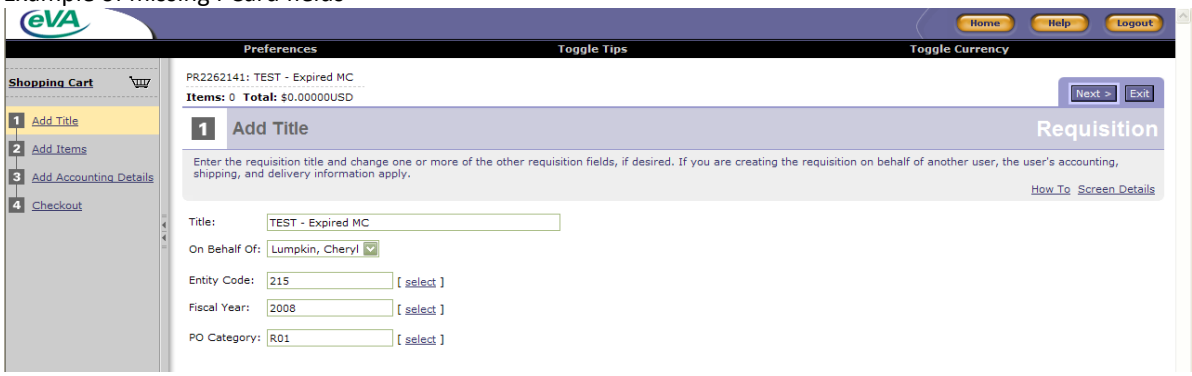
Click Submit when complete. Your card will expire every two years.

Follow the procedures on the next page to update your expiration date in eVA.

Credit Card (P-Card) Expiration

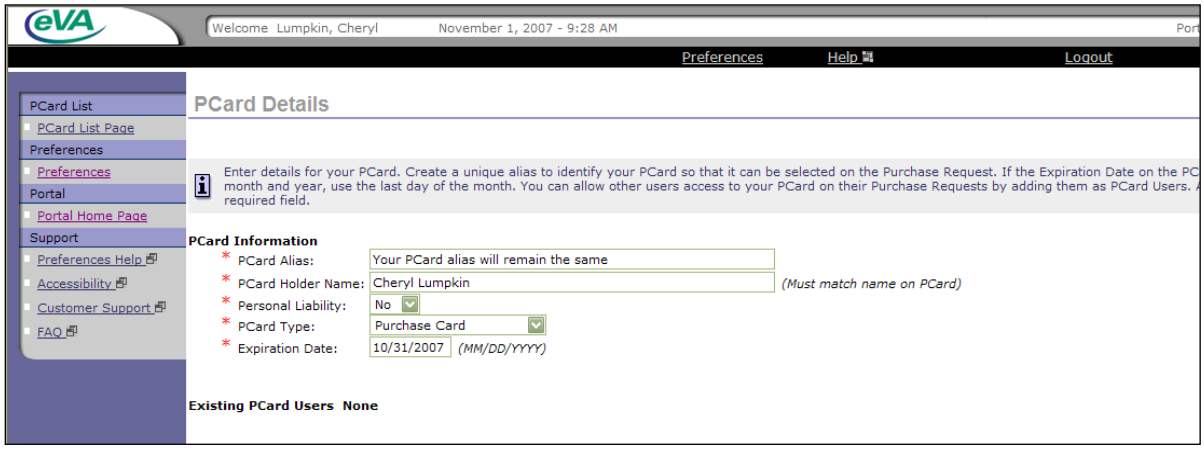
When the card expires, the PCard checkbox and alias will no longer appear in the Add Title screen and you will not be able to enter a PCO order. You should update your PCard expiration date as soon as you receive your new card.

Example of missing PCard fields



Click on the Preferences link on the black menu bar of the Knowledge Center portal. Enter the new expiration date and click Submit.

Sample PCard Update



Your card will be available in eVA the following day.

For ongoing orders that have been entered into eVA using P-Cards that have expired.

A change order must be completed to update the order information with the correct credit card information.

To complete a change order, follow the instructions in Step 6 – Change Orders of this manual.

On the My Home tab in the My Documents section, click the PR number of the Purchase Order requiring the change.

Click Change

to edit the Purchase Order.

Select the correct P-Card alias from the P-Card number dropdown menu.

Enter a description of the Change Order in the Comments section to ensure all interested parties understand the reason for the change order. To avoid duplicate shipments, select the checkbox and enter "Confirming Order, Do Not Duplicate".

Discontinuation of SPCC Duties

If you will be no longer using the SPCC card for Universtiy purchases, be sure to complete all of the following steps to ensure charges have been appropriated and to prevent any charges from being charged to your SPCC card after you have discontinued ownership of the card.

- Ensure all posted transactions are allocated and signed off prior to last working day.
- IF POSSIBLE, avoid making additional purchases to allow all transactions to post and be allocated and signed off prior to the last official work day. If not possible, please make sure that the cardholder supervisor has all current cycle documentation, including any pending transaction documentation, and the statement, if it has processed. The SPCC Program Administrator will assist the supervisor as necessary in signing off.
- Provided that all transactions are allocated and signed off, the card will be canceled and your Works account deactivated.

  If you will no longer be employed by the University, your SPCC card will be canceled and Works account will be deactivated on the separation date provided by Human Resources.
- Leave ALL SPCC files with current supervisor (Includes 3-years of historical files, as required for document retention).
- Destroy the plastic card (shredding is preferred!). If you do not have a shredder, please bring it to the SPCC Program Administrator and we will shred it for you. Please do not send in the interoffice mail.

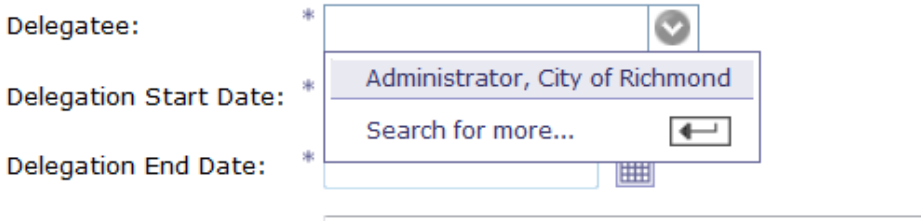
VII: Delegate Authority

Delegate authority option allows you to transfer your eVA approval requirements to another eVA user. Consider the following when using this function:

a. The person you select must have eVA security or must be allowed to have eVA security.
b. The person you select must be trained in eVA navigation and procedure to act on your behalf.
c. The person you select will approve all orders, including those selecting payment by credit card.
d. If you are a buyer, you are still responsible for ensuring your procurement file contains necessary documentation for audit review.

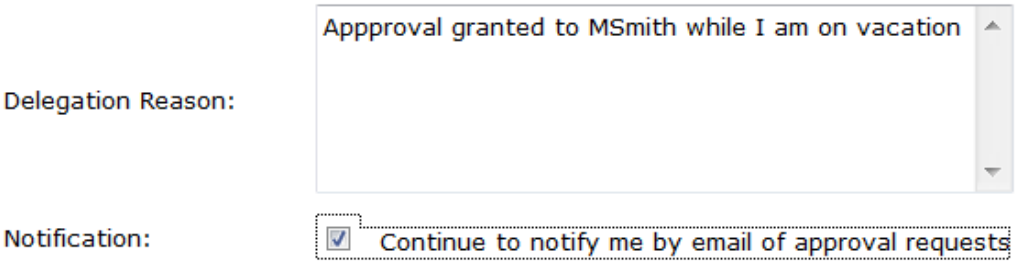
1. Log into eVA and select the eMall
2. Select Preferences, then Delegate authority

3. Select the dropdown from the Delgatee field and search for the person you are allowing to approve on your behalf.

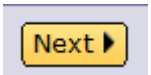


4. Select *Start* and *End* dates to the approval authority.

5. Place a small message on the reason for the change. If you wish to continue receiving email notifications on pending approval needs, check the *Notification* box.

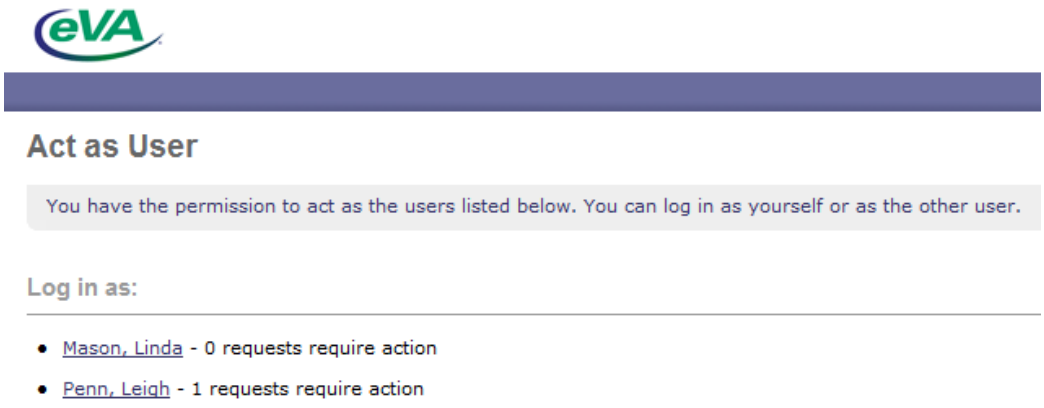


6. Select the on the bottom right of the page.

7. You may add an additional approver, if you desire. This is an optional feature that should be used only if the person selected approves the additional responsibility of approving all eVA orders in <u>cooperation with the Designee</u>. Skip this addition by selecting 

8. Complete the delegation request by selecting

When the delegated approver signs into eVA they will need to then choose whether they are logging in as themselves or the approver.



SECTION VIII: University Practices

PCard Orders Placed on Your Behalf

Orders placed on your behalf and charged to your credit card may be initiated by a Buyer Specialist in the Procurement Department, the Design Services Production Manager or the DoIT Business Manager. The following example outlines the OBO process for a Design Services order placed on your behalf. Other OBO follow similar guidelines. Before an OBO order can be placed, your card number must be set up correctly in eVA. When placing an OBO, choose the appropriate *Ship To* address to have the order delivered to the correct location.

Design Service Orders

When the Design Services Production Manager (Design Buyer) places orders on your behalf, she is authorized to submit the order using your PCard if the vendor accepts the card. The Design Buyer creates a requisition and selects your name in the On Behalf Of field. Your PCard alias appears and the Design Buyer checks the PCard box. The Design Buyer enters the remainder of the requisition information and submits the order.

The order routes to your Approve Requests folder in eVA and you will be sent an Ariba message via email notifying you that your approval is required. You should open the folder, select the order and click on Approve. By doing so, you are agreeing that the order may be charged to your card.

The requisition will route to any other approvers in the Approval Flow. *Note: If the vendor does not accept electronic orders, you will need to approve the order a second time. You will receive an Ariba message via email if you must approve the order again. The Design Buyer will print and send the order to the vendor if necessary. If the vendor does not accept electronic orders, you will need to call the vendor and provide your credit card number by phone.*

When you receive your printed materials, review carefully and notify the Design Buyer if there are any problems with the print quality, quantity, binding, etc. She will work with the vendors to correct

any problems. If a Change Order is necessary, she will enter the change order and you will receive Ariba messages requiring your approval of the change order.

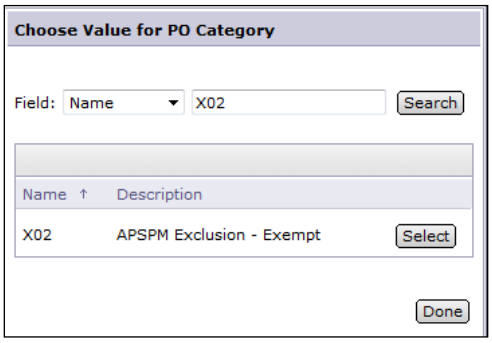
Business Card Ordering Instructions

University Faculty/Staff Business Cards are ordered from the Virginia Correctional Enterprise (VCE) PunchOut Catalog within eVA.

When placing an order for business cards please remember that there is a University Identity Standard that must be followed. If you have questions about the University's Identity Standard and appropriate content for business cards, please contact AJ Newell, Director of Design Services or visit the University Design Services web page.

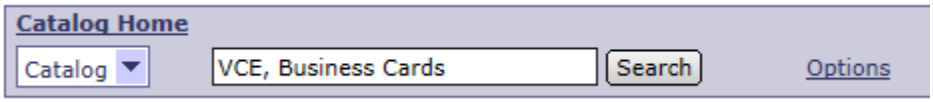
To Order Business Cards from the VCE PunchOut Catalog:

1. Create an eVA requisition.
2. Enter the *Title* for the order.
3. Check the *P-Card* box to pay using your credit card.
4. Select the PO Category: X02 for a Government-to-Government transaction.
5. Select Procurement Transaction Type: 20–Supplies Non-Technology.
6. Click Next.



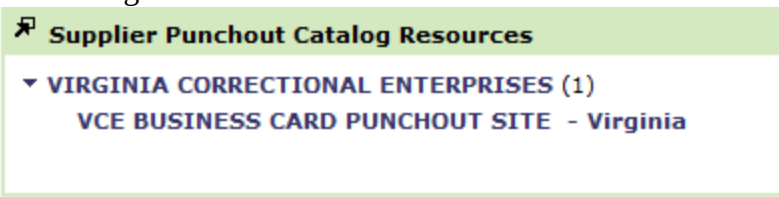
You will be directed to the Catalogs Home Page.

7. From this page, in the Search bar at the top of the Home Page enter "VCE, Business Cards"



8. Click *Search*.

9. Click “VCE Business Card PunchOut Site – Virginia” to be directed to the VCE PunchOut catalog

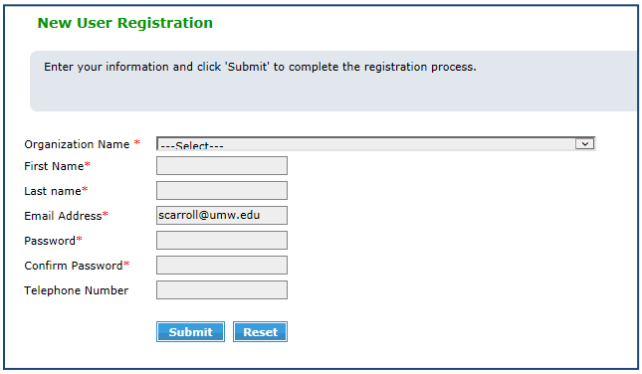


In eVA you can save this search under “Options” so that you have a one-click method to return to this catalog.

The first time you enter the VCE PunchOut Catalog, you will be prompted to create a New User Registration.

<u>To Create a New User Registration:</u>

1. Select “215-University of Mary Washington” from the Organization Name dropdown.
2. Enter your First and Last Name.
3. Create a password for the VCE PunchOut Catalog.
4. Reenter this password to confirm the password.
5. Optional: Enter your Telephone Number.



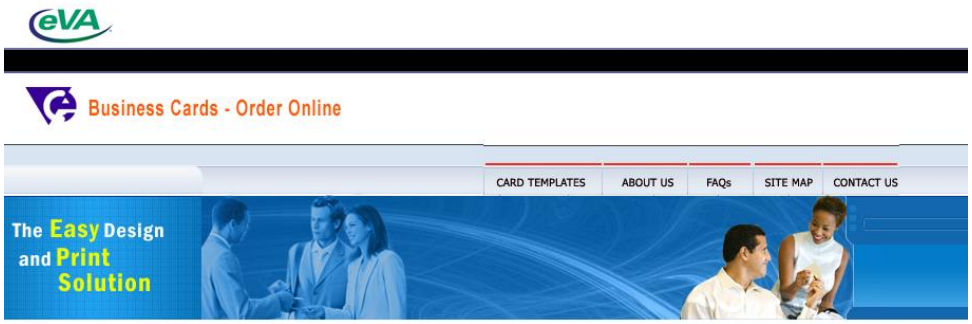
Once you have completed the New User Registration, you will be directed to the list of Templates.

Note: A notification may appear before you reach the list of Templates asking how you reached the PunchOut Catalog. Click “close”.

You will be directed to the VCE Business Cards home screen.

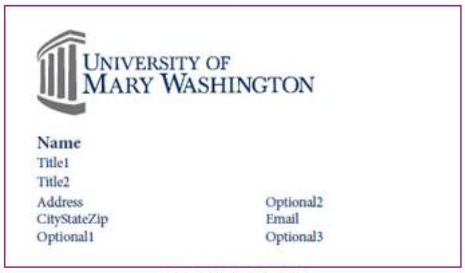
<u>Designing your Business Card:</u>

1. Select “Card Templates” at the top of the screen.



Most of the current UMW templates can be found at the bottom of page two (2).

Template: 9992_S1_SI22_215A is the standard UMW template for most UMW faculty and staff.

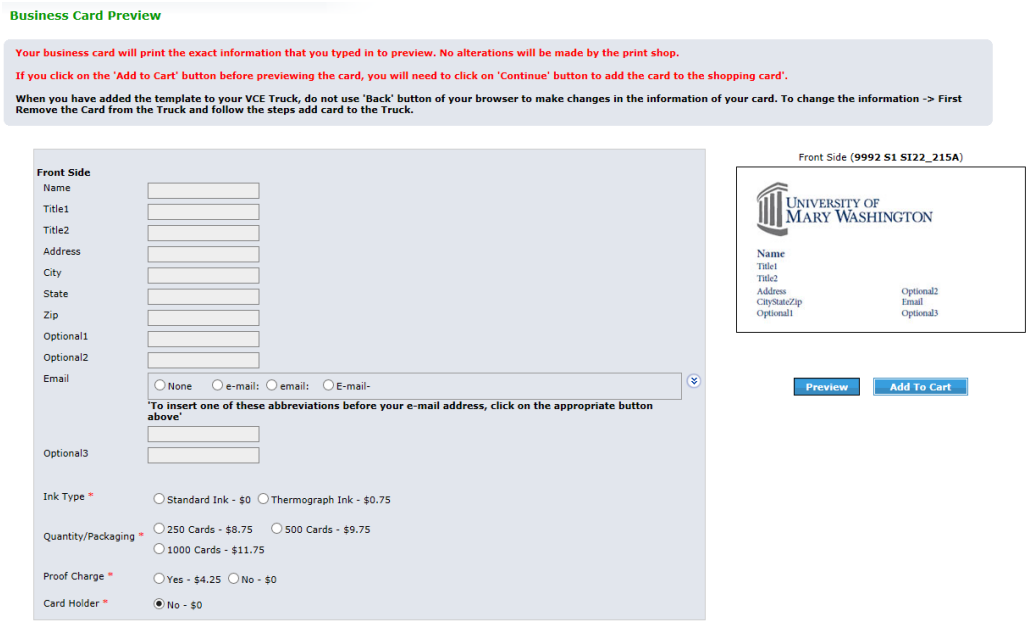


9992 S1 SI22 215A

2. Select the template you would like to use.

Other templates are available including Athletics, Gari Melchers Home and Studio, Kalnen Inn, The James Monroe Museum, UMW Galleries and UMWSBDC. If you are unsure as to the appropriate template for your card order, or need to create a new template, please contact University Design Services for assistance.

3. Enter your information into the appropriate fields to the left of the screen as you would like it to appear on the business card.



The instructions below are formatted for the standard UMW template. Other University templates have slightly different requirements. If you have questions, please refer to current cards in your department or contact Design Services for assistance.

Template:

1. "Name": Complete the full name of the staff person, including any suffix, i.e. "Ph.D."

2. "Title1": Enter the employee's title, using abbreviations as necessary to fit on the card.

3. "Title2": Enter his or her title, using abbreviations as necessary to fit on the card.
   Building or Hall References as well as campus location (i.e., Stafford, Dahlgren) on business cards are not permitted by the University Identity Standard. Please refer to the Identity Standards for guidance.

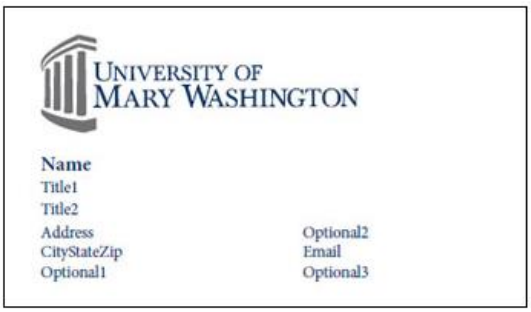
4. "Address": Enter the University Address as follows:
   1301 College Avenue

5. "City": Enter the City as follows:
   Fredericksburg

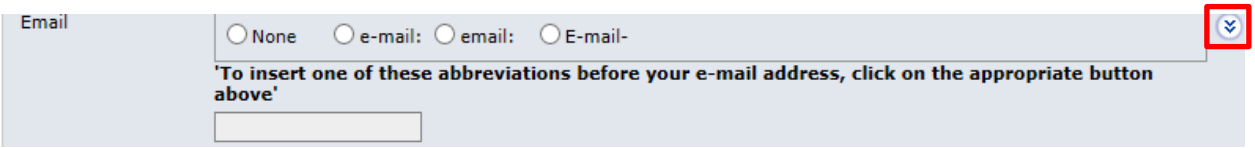
6. "State": Enter the State as follows:
   VA

7. "Zip": Enter the Zip Code as follows:
   22401
8. "Optional1": This field is intended for the phone number.
   The format for phone numbers for UMW cards is as follows: XXX-XXX-XXXX.
   Enter the telephone number as: Tel: XXX-XXX-XXXX.
   If you require a 2nd number such as a toll-free number, enter the numbers as follows:
   Tel: XXX-XXX-XXXX or XXX-XXX-XXXX.
   Only three (3) total numbers can be entered on any given card using the UMW template.
   Refer to the Identity Standards for guidance.

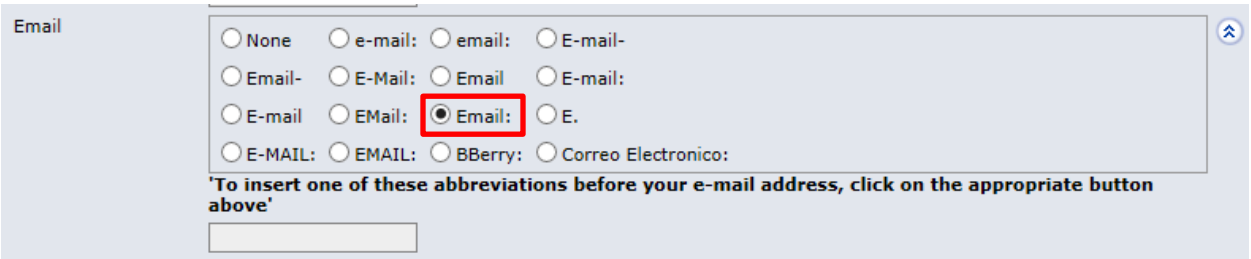
9. "Optional2": This field is intended for a second phone number (such as a cellphone or fax number).
   The format is the same as for Telephone number above.
   Fax: XXX-XXX-XXXX
   Please note that this field will appear in the column to the right. (Maximum characters for this field is 30.)



10. “Email”: Select the down arrows to view more abbreviations.



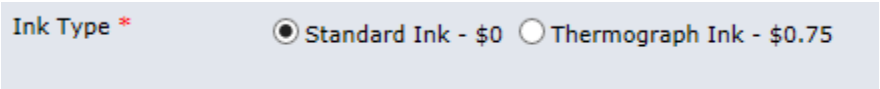
Select “Email:”



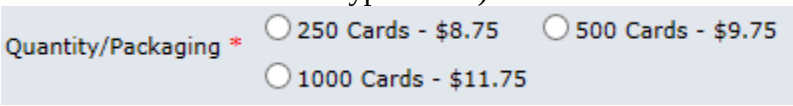
Enter the UMW email address in the blank below exactly as it is formatted in UMW’s email program. (Maximum characters for this field is 30.)
anyemployee@umw.edu

11. “Optional3”: This field is intended for the web address.
    Use www.umw.edu as the standard default. (Maximum characters for this field is 30.)
    Do not enter information in this field other than the web address. Only UMW web addresses are approved for use on business cards.

12. “Ink Type”: Choose “Standard Ink”
    UMW no longer requires the use of Thermographic ink on business cards.



13. “Quantity/Packaging”: Choose quantity
    Pricing is based upon the quantity and built into the template that you chose (i.e., number of colors used in the card and type of ink).

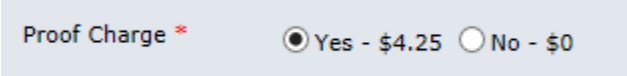


You may only choose 250, 500, or 1000 as the quantity per state regulations.

QUANTITY	COST
250	$20.75
500	$21.75
1000	$23.75

14. You must choose a proof as part of the card order. If you make an error in the card copy, you will have an opportunity to proof the card exactly as it will print by receiving a digital proof from VCE for review. If there is a copy change between the date you place the order and the date the proof arrives, you will have opportunity to make the change.

If you do not request a proof, and the printed cards are inaccurate, any reprints will be at the department's expense. VCE will NOT make any changes or correct even obvious errors unless you request a proof and you request the corrections or changes. VCE will print the exact information that you enter into the order.

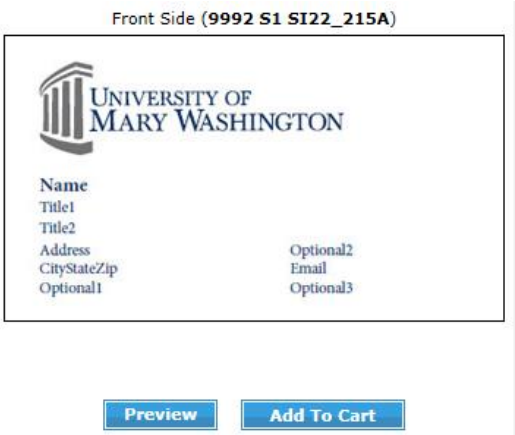


Approximately 2-4 days after the order is entered, if you have requested a digital proof, you will receive an email from the VCE print shop with an exact representation of the card in PDF format. You will need to review the card proof for accuracy and approve it to print or request corrections via reply email. It is the responsibility of the purchaser to contact VCE if a proof has not been received within seven business days (VCE contact information is listed on the last page of this document).

Note: an additional $4.25 will be charged for each additional change request to the order once the order has been submitted. If any further changes are made, please include a separate line item for the additional charge(s) on the eVA Purchase Order.

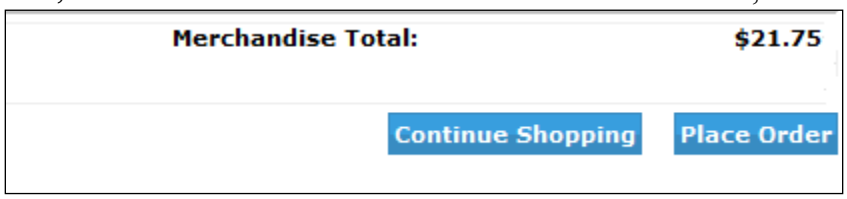
15. Once all information has been entered, click "Preview" to view a sample of the business card. To make additional changes, type over the information entered to the left. Click "Preview" again to view your changes.

    Some typesetting adjustments will be made to format the card correctly. The preview is NOT an exact representation, to scale, of how your card will look when printed. Also note that long titles or department names may not fit into the card template. Please try to keep this information as brief as possible, using abbreviations as necessary. For assistance with abbreviations, please contact Design Services.



16. When no further changes need to be made and the card appears correct, click "Add to Cart."

17. On this screen you will now see the total cost of your business card(s), another preview of the card, and the order details. To add more cards to the order, click "Continue Shopping".



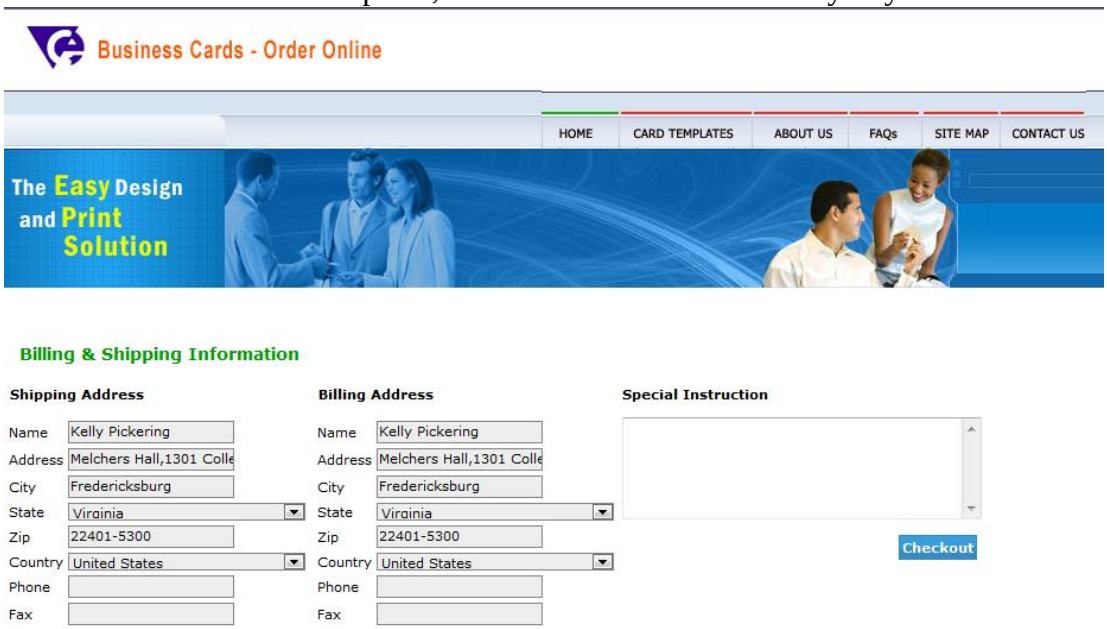
18. Click "Place Order" when you are finished ordering cards for your department.

The Check Out screen contains information for billing and shipping.

19. Ensure the shipping and billing addresses are correct.
    All billing addresses should be:
    1301 College Avenue

Fredericksburg, VA 22401

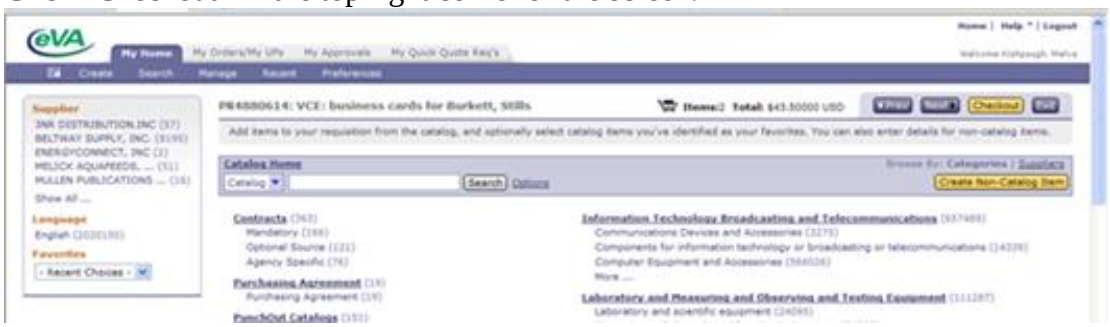
20. If there are any additional instructions, enter those into the Special Instructions section. You may want to enter your name/email address/phone number in the Special Instructions section and state that the proof, cards and invoice are sent only to you.



21. Once Billing and Shipping information is complete and Special Instructions have been included, click “Checkout”.

Once you check out of the VCE Business Card PunchOut Catalog, you will be directed back to eVA, where your order will be processed and paid for.

22. Click “Checkout” in the top right corner of the screen.



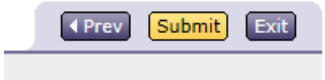
This will bring you to the details of the order.

Each Business Card will become a line item on the eVA order and can be assigned its own FOAP information or mass edited with the same FOAP information.

23. Add FOAPAL information to the line items.

24. Add any additional comments (it’s always a good idea to repeat the delivery address information here).

25. Click "Submit" to Process the Order.



After Submitting Your Order

Don't forget:

- Print your eVA Purchase Order for your SPCC file.
- A packing slip will be included in your shipment. Include this packing slip in your SPCC file.
- Payments are posted when the cards are shipped.

Digital Proofs

- Digital proofs are emailed to the eVA Requester from the VCE Print Shop.
- Review all content that will be printed on the card.
- Ensure spelling is correct and telephone numbers are accurate.
- VCE will not correct even obviously misspelled words. Reprint charges will be at your department's expense.

If You Have Identified a Correction:

- Reply to the VCE proof message stating all corrections.
- Additional digital proofs cost $4.25.

If the Card is Correct as Originally Proofed:

- Just reply to the original email and state that the cards are approved to print.

If You Do Not Receive Requested Proofs Within 3 Business Days of the Order:

- Contact Amie Sturgill or Jan Thruston with VCE.

Amie Sturgill	Amie.Sturgill@vadoc.virginia.gov	804/372-4912
Jan Thruston	Jan.Thruston@vadoc.virginia.gov	804/372-4911

Temporary Employment Contracts

The University has a contract to provide temporary employment services.

The following eVA procedure is followed after:

- Completing a Request for Temporary Personnel Form. This form will be used to enter the eVA Purchase Order and must be attached to the order.
- A discussion with the supervisor to determine how to manage the temporary workers, time card management, appropriate back up, and contract changes, and Works sign off procedures.

Purchase Orders will probably be initiated and managed by the type of hire needed and length of term. For instance, you may have one order for Office Workers for a 6 month term, and you may

have a separate Purchase Order for Labor for the entire fiscal year. Regardless, the purchase order must be managed to reflect services within a fiscal year.

Management of the eVA order and related procurement folder is the responsibility of the eVA buyer. Related Works coding, approvals, and sign off are the responsibilities of the card holder and the related supervisor.

Log into eVA and select ***Shop Now***

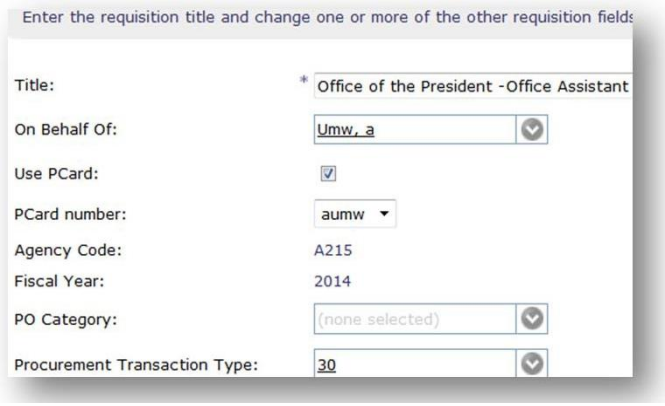
Step 1

On the *My Home* tab – Create Requisition

Title: Insert a title for ease of identification. Type the name of the hiring department followed by a basic title of the temporary assistance requested.

- To the right is a sample using the Office of the President.

Use PCard: If the vendor accepts the credit card, make sure is checked.
Procurement Transaction Type: insert 30.



On the bottom right of the form, select ***Next*** to move to Step 2.

Step 2

Add Items page

In this step, you will be adding the first of two required line items. The first line item will be for the basic hourly rate. The second line item (added in Step 3) will reflect overtime pay.

Select ***Create Non-Catalog Item***.

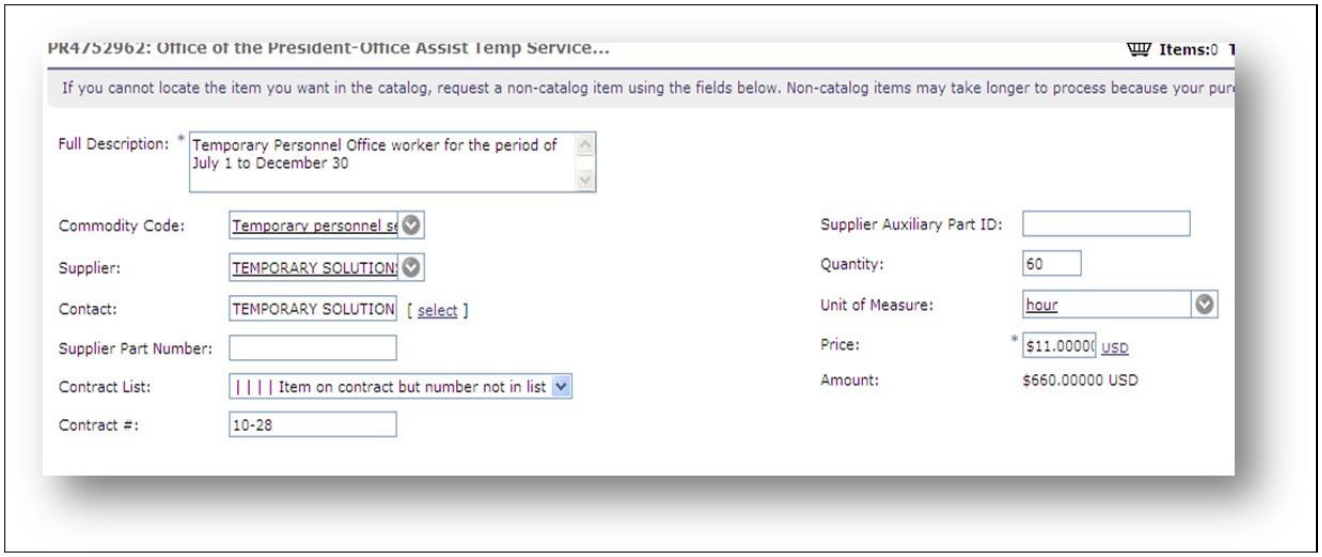
Enter the following information within the fields:

Description – Add this basic description, additional information can be added based on department need.

Temporary Personnel required for (*insert name of position*) services for the period of (*insert time period*). (You may use the full fiscal year, for the time frame, if desired).
Credit card is to be charged as services are rendered and approved, based on the weekly time card, per employee.

Note! Contracts must be reviewed at end of year for dollar accuracy and fiscal year renewal, if necessary.

Quantity **–** Most personnel are paid by an hourly rate. Insert the approximate number of hours



you will need, based on the length of this contract. This is an estimate only and can be easily changed.

UOM (Unit of Measure) – Select *hour* from the drop down.

Price **–** Enter the temporary hourly rate. {**Note-** Temporary services are expensed from your Operating budget}

NGIP Commodity Code – Enter the NIGP code 96269 in the Field Name search (Temporary Personnel Services)

Supplier **–** Insert the name of the vendor as indicated on the form or as instructed by HR.

Contact **–**The contact will default based on the Supplier.

Contract List **–** From the drop down, select ***Item on contract but number not on list***.

Contract Number – Enter number according to current contract.

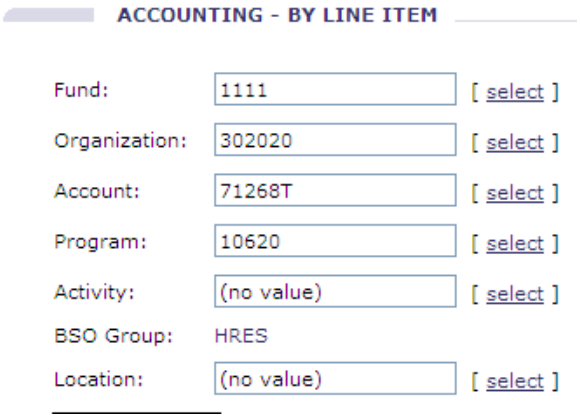
When complete, select *Update Total* > *OK* and then

Note: Temporary employees with pay differentials (i.e. shift work), or those with differing pay rates; may require separate line items on the purchase order. If unsure, talk to Procurement services to help determine the best tracking method for your department.

Select *Edit* from line one and scroll to the middle of the page to the *Accounting by Line Item* fields.

Step 3

Add Accounting Details, Line 2 for Overtime pay, and attach the HR form



Enter the FOAP information for this service. The account code **71268T** is specifically used for Temporary employment services. Note: Temporary Services are charged to your departmental Fund, Org., and Program code.

Leave the Location field blank.

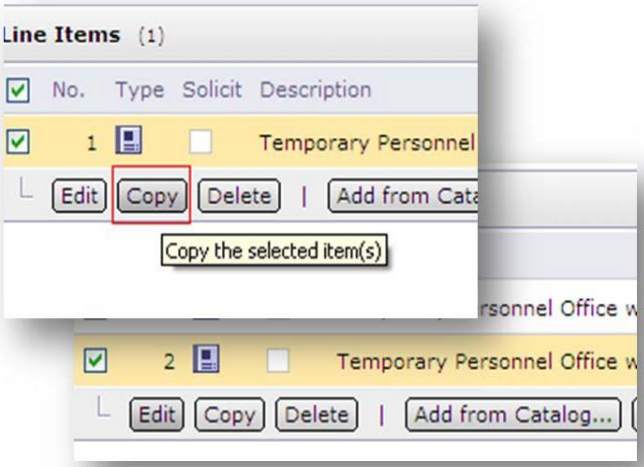
Scroll down to the end of the page. {Purchase Order Shipping and Comments sections are handled on the next form}

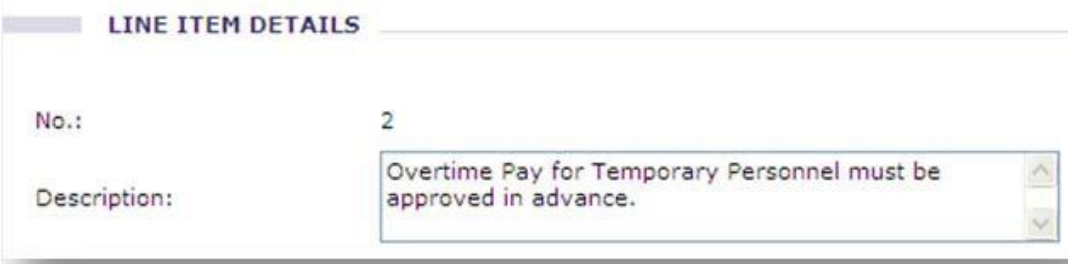
Select OK to return to the Summary tab.

Using the Copy function, copy line 1 to line 2.

On line 2, select the *Edit* button to change the line description to read *"Overtime Pay"*.

If you are not expecting to pay Overtime (which will be more than the basic rate per hour), Make a note in the description that overtime pay must be approved in advance. The *Price* will be $0 with a *Quantity* of 1.





If you are expecting overtime estimate the number of hours.
Select the OK button to return to the Summary Tab.
Scroll down to the bottom of the page to insert the HR form to the requisition. Select the ***Add***

Attachment button, and then Browse to the form on your desktop.

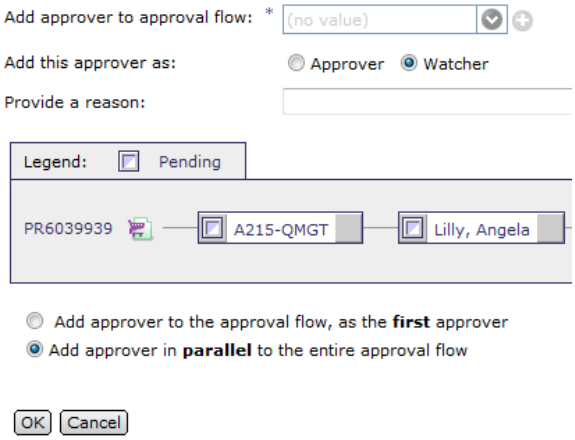
When the document is attached, select the Visible to Supplier check box and then select *OK* to complete this process and return to the Summary tab.

Step 4

Add the HR Contract Administrator as a *Watcher* to the Requisition.

From the *Summary Tab* scroll up to select *the Approval Flow* tab. Click on the *Add Approver* button.

- On the ***Add approver to approval flow*** field, use the down arrow and search by Name
- Select the ***Watcher*** radio button
- Select ***Add approver in parallel to the entire approval flow***
- When this form is complete, select the *OK* button.



Submit the order, or *Exit* to save the request in Composing for later submission.

Purchase Order Contract Tracking

Ideally, the dollar value of the purchase order will exactly match the amount actually expensed for the service. However; it is very likely that the eVA purchase order will require a change due to one of the following:

- Services are extended or terminated earlier than expected,
- The final cost of the contract is higher or lower than expected,
- Contract terms and conditions have changed, or
- The vendor can no longer meet your requirements.
- Your department budget can no longer afford the expense.

You may need to work with the Human Resource Office on the possible change requirement or circumstance, but the eVA Change Order is the responsibility of the department Buyer. Buyers may contact TESS or Procurement Services for assistance with contract expense tracking or the Change Order

Timecard, Invoice and Works

Every Friday, the temporary employee will submit a timecard to the supervisor to verify the numbers of hours worked and rate of pay. The approved time card authorizes the contractor to charge the weekly rate to the credit card.

By the following week, the vendor should send you a paid invoice and a copy of the corresponding timecard. Verify hours on the timecard reflect actual posting in Works prior to Works sign off. Remember to code the expense to account code 71268T. Contact HR if discrepancies are found in hours, pay, or if a paid invoice is not received in a timely fashion.

Note! Maintain both the invoice and the timecard within the Procurement file. This is required backup documentation. If the vendor submitted a time card to you with the hire's social security number, please black off the number as best you can and request that the number be omitted in any future cards.

Use of the Gold Card

If your purchase exceeds your buying authority, you may have an option to use the ***Gold Card***. If you have been instructed to use this procedure by procurement, follow the guidelines below to use the card managed by an Accounts Payable Manager (sample below is Julie Smith). If required, please forward all supporting procurement file documentation and back up requirements such as invoices, SWAM quotes, credits, or waivers to her.

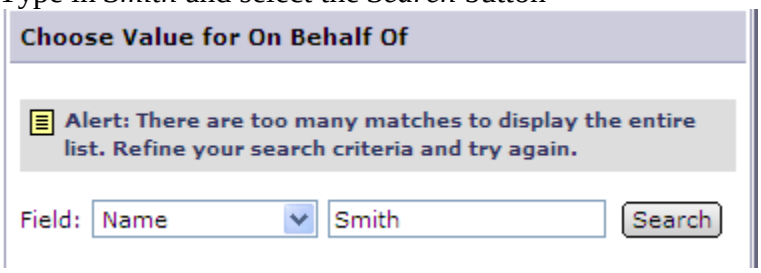
Use of the Gold Card begins with the Requisition in eVA. The following fields are required: *On Behalf Of*, *Use PCard* should be checked (as shown) and *PCard number*.

Before beginning, contact Accounts Payable for correct Gold Card Name.

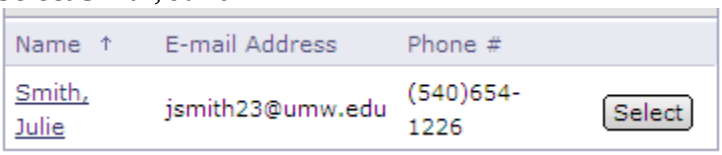
1. Enter the Requisition *Title*.

2. Select the Name of the buyer's card you are using (*Julie Smith* sample name for this purpose) for the *On Behalf Of* (referred to as OBO) section. If *Julie Smith's* name does not show in the Drop Down menu, select *Search for more.*

Type in *Smith* and select the *Search* button



Select *Smith, Julie*



Julie Smith will populate the Use *PCard* and the *PCard number* as Payables.

3. *Julie* will be included in the eVA Approval process.

4. All orders will continue to show within the links on your eVA Home page**.**

5. *Julie* will complete the mandatory online reconciliation process in WORKS, please forward any necessary attachments to Julie.

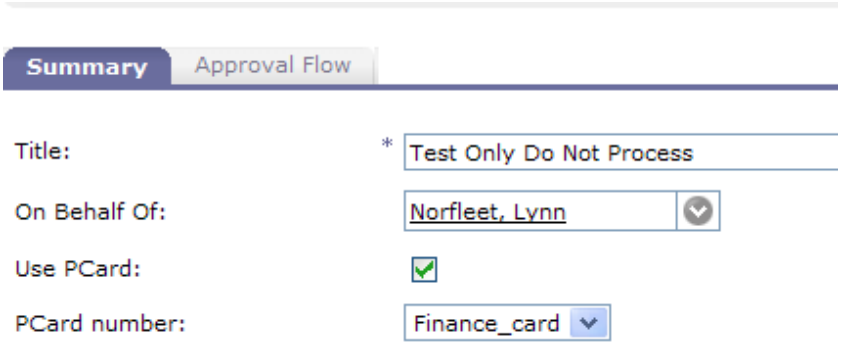
6. Choose the appropriate *Ship To* address to have orders delivered to the correct location.

*******Vendors Not Accepting Electronic Orders
You will be the final approval on all orders that will not electronically route to the vendor. All Vendors who elect to "opt out" of electronic ordering must receive Purchase Orders via email, paper copy, or fax.
After you approve the Purchase Order, send a copy to the cardholder. The cardholder will need to provide the Gold Card information to the vendor over the phone. Contact the cardholder to coordinate this process.

Use of the Finance Card

If your purchase is going to be paid for using local funds, you will use a ***UMW Finance Card***. If your department does not hold a UMW Finance card, when entering the order into eVA you will choose an alternate "On Behalf Of". If required, please attach all supporting procurement file documentation and back up requirements such as invoices, SWAM quotes, credits, or waivers to the eVA order.

In the "On Behalf Of" section you will select the appropriate UMW Finance Card holder. The sample below will show the cardholder as *Lynn Norfleet*.

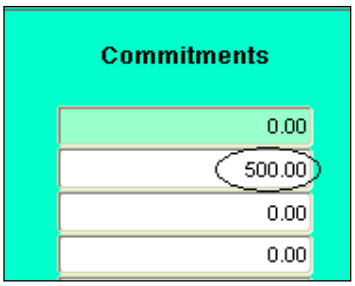


Note: Choose the appropriate *Ship To* address to have orders delivered to the correct location.

Banner Relationship to eVA

Fully approved orders uploaded to Banner daily. System Support is notified daily of change orders in eVA and Banner will be manually updated.

Banner will only show the Purchase Order number assigned to the order, not the PR number. Orders paid by PCard and assigned a PCO number are not fed into Banner. PCO orders and Purchase Orders paid by the Small Purchase Credit Card (SPCC) must be reconciled online with the WORKS system.



eVA orders appear in the Commitment Column of budget reports and views.

Budget training is available from Training, Evaluation & System Support. Visit the TESS Training Calendar to find the next scheduled class.

When the good or service is delivered for a non-credit card order, complete a Receiving document in Internet Native Banner (INB). See the Banner Receiving Guide for instructions on completing this document.

Protection of Personally Identifiable Information

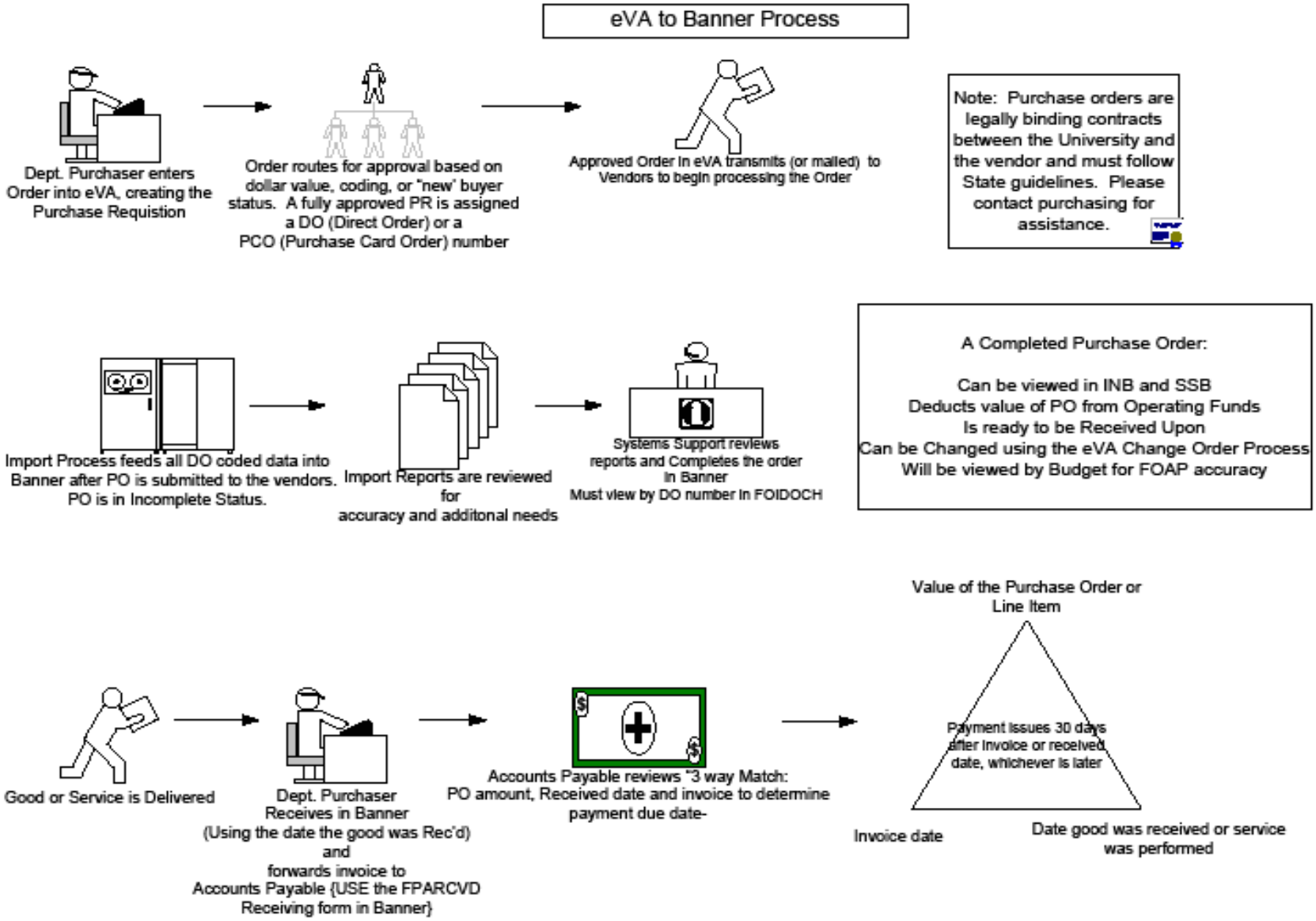
If you receive a Freedom of Information Act (FOIA) request from University Relations or when faxing/emailing remember the requirement to protect personally identifiable information from public access, including among others Social Security numbers, Federal Tax ID numbers, Patient Information, and Personal Banking Information.

This information is to be removed from procurement documents or procurement files when made available to the public. eVA Purchase Orders and other documents are public documents. Therefore, this information is only to be included if including such information is required by law or essential to the processing of or execution of the Purchase Order.

If you must include such information, do so by utilizing the comment field and file attachment capability at the line level and header level of the Purchase Order and ensure that the box is checked indicating to mark the comment or attachment Proprietary and Confidential. If this information must be conveyed to the vendor, check the box to indicate Visible to Supplier.

SECTION IX: References and Banner Process Workflow

Workbook References If You Need Assistance With:	Contact	Website Assistance
Contracts, Quotes, Bid Requirements	Procurement Buyer Specialist	http://adminfinance.umw.edu/purchasing/contracts-2/
SPCC program regulations and spending limits	Procurement Buyer Specialist	http://adminfinance.umw.edu/purchasing/umw-policies-and-procedures-2/
Questions on SPCC Account Coding and coding on Budget Reports	Contact Accounts Payable of System Support	
Vendor Issues including Small business and eVA Registration	Procurement Buyer Specialist	
FOAPAL Securities, Log-In Assistance, Passwords, Training for eVA and Banner and System Issues	System Support Specialist	Various Training Materials: http://adminfinance.umw.edu/tess/revised-instructional-materials-page/
Funding Restrictions , Capital Projects, Budget Assistance	Office of Budget and Financial Analysis	http://adminfinance.umw.edu/tess/fundamentals-of-finance/chart-of-accounts/
Fixed Asset Coding, ETF, Equipment Trust Fund	Accounting Staff	
Banner Training for Budget, Direct Pay entry or Receiving; System Issues	System Support Specialist	
eVA Exceptions, Invoices, Payment Due Dates, Check Request Needs	Accounts Payable	Direct Pay Information http://adminfinance.umw.edu/ap/direct-paycheck-requests/


eVA to Banner Process
Dept. Purchaser enters Order into eVA, creating the Purchase Requistion
Order routes for approval based on dollar value, coding, or "new" buyer status. A fully approved PR is assigned a DO (Direct Order) or a PCO (Purchase Card Order) number
Approved Order in eVA transmits (or mailed) to Vendors to begin processing the Order
Note: Purchase orders are legally binding contracts between the University and the vendor and must follow State guidelines. Please contact purchasing for assistance.
Import Process feeds all DO coded data into Banner after PO is submitted to the vendors. PO is in Incomplete Status.
Import Reports are reviewed for accuracy and additonal needs
Systems Support reviews reports and Completes the order in Banner
Must view by DO number in FOIDOCH
A Completed Purchase Order:
Can be viewed in INB and SSB
Deducts value of PO from Operating Funds
Is ready to be Received Upon
Can be Changed using the eVA Change Order Process
Will be viewed by Budget for FOAP accuracy
Good or Service is Delivered
Dept. Purchaser Receives in Banner (Using the date the good was Rec'd) and forwards invoice to Accounts Payable {USE the FPARCVD Receiving form in Banner}
Accounts Payable reviews "3 way Match: PO amount, Received date and invoice to determine payment due date-
Value of the Purchase Order or Line Item
Payment Issues 30 days after Invoice or received date, whichever is later
Invoice date
Date good was received or service was performed

[B]