

eVA User Manual

Purpose and Overview

eVA is a web-based Procurement tool that was designed for and is used by most agencies in the Commonwealth of Virginia. The University of Mary Washington uses eVA to solicit registered business for contracting opportunities 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 suppliers, the relationship between eVA and Banner and the relationship between eVA and procurement.

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

1. Obtain training on and security access to eVA by attending the training classes Purchasing I & II as well as SPCC and submitting the Delegated Purchasing Authority form. Copies of these forms are available from the [TESS website](#). Reach out to TESS to schedule training.
2. Submit a Purchasing Card Request form and Prospective Cardholder analysis. Forms are available from the [Procurement Services](#) website.
3. 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.
4. 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 supplier does not accept the SPCC. A list of exempt purchases is available on the [Procurement Services](#) website.

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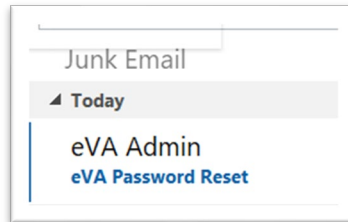
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Logging into eVA

Navigate to the [eVA Homepage](#)

1. Select *Buyer Login*

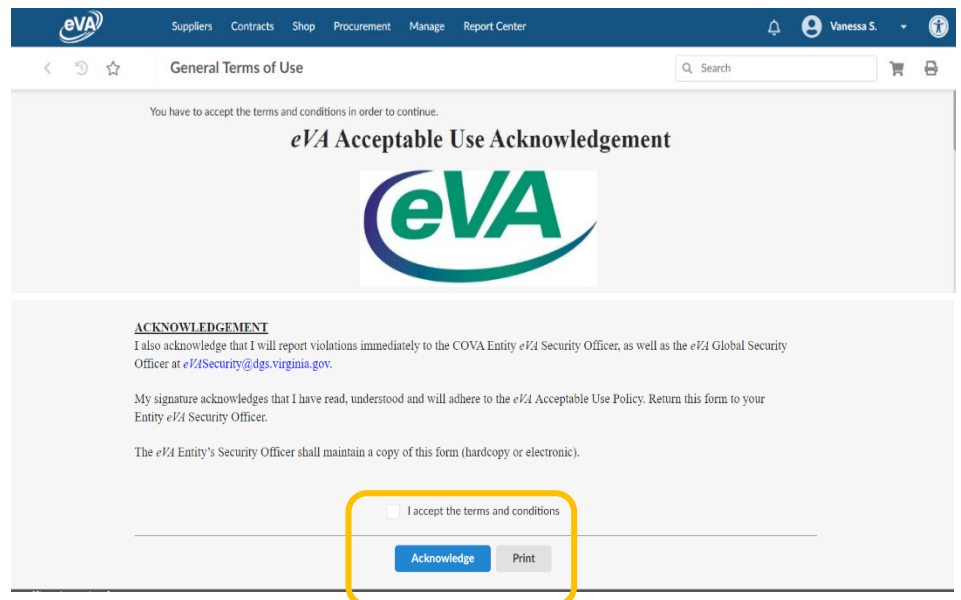
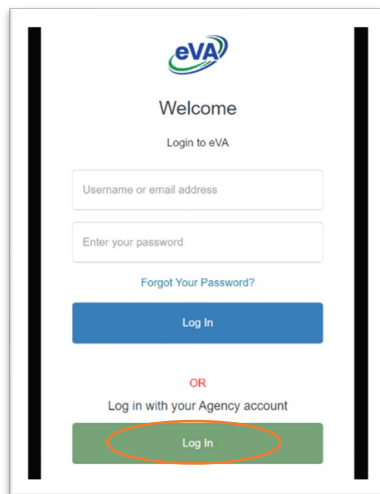
If you cannot login with your current eVA password, insert your email address and select *Forgot Password*. A system generated email will be sent with instructions for password reset. Check your junk mail, the email may have posted there.



If the email landed in your junk folder you will need to move it to your inbox (links are disabled in the junk folder). Open the email and click the link to reset your password. After the password has been reset navigate back to the eVA Homepage and enter your username and new password.

2. You will be required to read and acknowledge the *Eva Acceptable Use Acknowledgment*. Read through then check the box to accept the terms and conditions. Click *Acknowledge*. You will be directed to your dashboard within eVA.

Note: Single Sign On (SSO) is available as an alternative to entering your eVA password. Select the green *Log in* button and enter your Net ID and password.



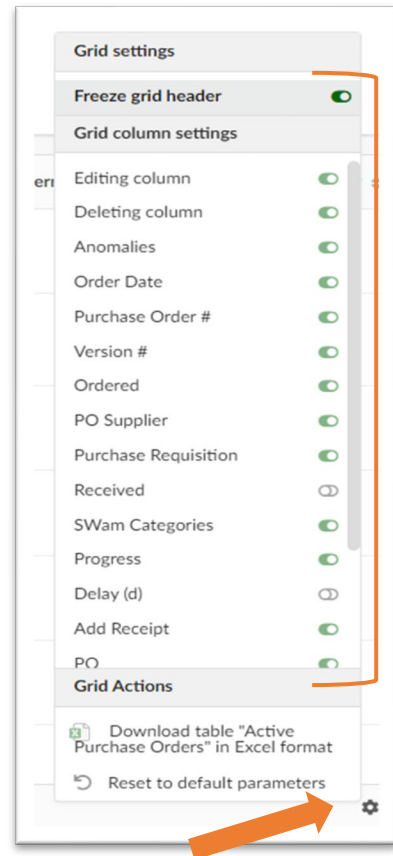
Search Results Grid Customization

Grid views within various areas of eVA can be customized. It may be helpful to hide/show/reorder selected columns within *Browse Requisitions* and *Browse Orders* based preference.

Note: Currently grid customizations can only be retained within the *Browse Requisitions* and *Browse Orders* areas. Grids within the PO or REQ will revert back after logging out of eVA.

Click the *gear icon* in the lower right corner of the results grid. The *Grid column settings* displays a list of available columns.

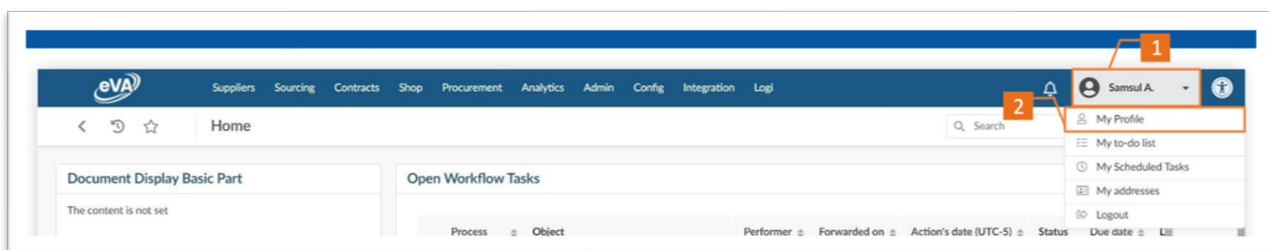
- Use the toggle button beside the column name to hide or show a column.
- Drag and drop the column name to reorder the grid view.
- The *Freeze grid header* button will freeze the header columns as you scroll through the results.



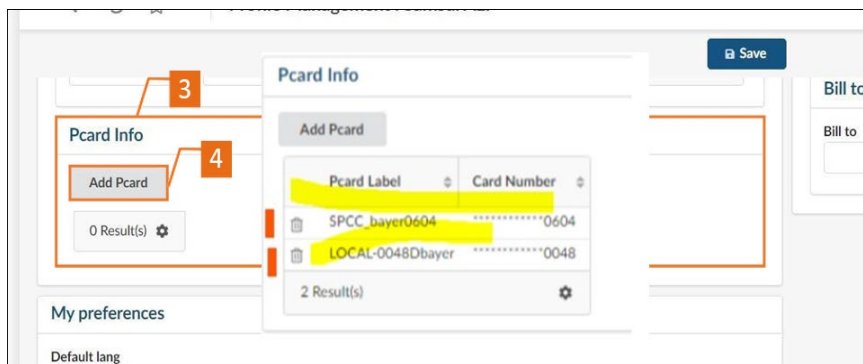
PCard Management

Follow the steps below to add, view and manage your pcard within eVA. Once your card is added, it will be available for immediate use.

1. On the eVA homepage, click the drop-down menu beside your name.



2. Select the *My Profile* option.
3. On the Profile Management page, scroll down to *Pcard Info*
4. Click *Add Pcard*



NOTE: If you've already added your pcard(s) they will appear in the Pcard Info section. You may delete cards by clicking the trash can icon. You cannot edit a pcard once it has been saved. You'll need to delete and re-enter the card.

5. Enter the *Pcard Label* as described below
 - a. *SPCC*: username or Net ID + last 4 of Pcard number (ie. esmith9999)
 - b. *Local Card*: username or Net ID + last 4 of Pcard number (ie. esmith9999Local)
 - c. *Gold Card*: username or Net ID + last 4 of Pcard + Gold (ie. esmith9999Gold)
 - i. If you have a number included in your Net ID (ie. esmith2) your card label will be esmith29999
6. Select the *Card Provider* of the credit card associate with the Pcard from the drop-down menu.
7. Enter your *Name* (as it appears on the card).
8. Enter the *Card Number*.
9. Select the credit card *Expiration Month* from the drop-down list.
10. Select the credit card *Expiration Year* from the drop-down list.
11. Click *Save & Close*.

Organization and Access

Introduction – eVA UnPlugged

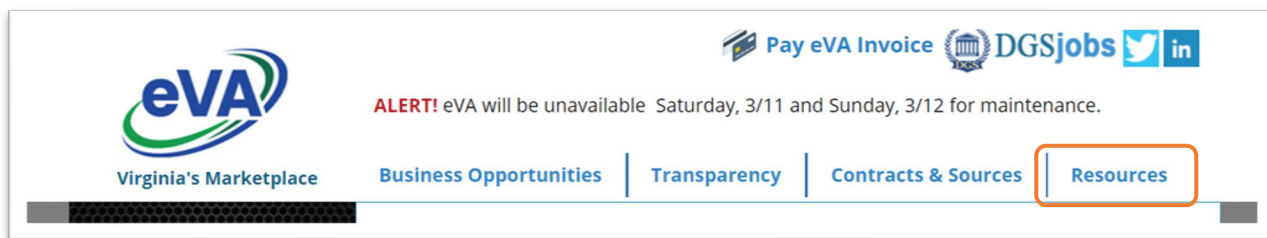
eVA Unplugged shows you how to find useful and necessary purchasing information prior to making purchases. The eVA Home Page (described below) and training materials, written specifically for UMW buyers, will help guide you through the pre-purchase process.

Navigate to the eVA Home Page <https://eva.virginia.gov/index.html>

The eVA Home Page communicates with suppliers (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

The top bar of the Homepage contains quick links to address various constituent concerns. The commonly used links are found within the *Resources* dropdown.



The [NIGP Code Look Up](#) link gives you the ability to search for NIGP codes, which identify particular goods and services offered by state suppliers.

To search for an NIGP code, click on the ***NIGP Code Look Up*** link.

Use the *Search Description* box to search for the item or category of items you intend to purchase.

NIGP Code Starting With:	<input type="text"/>	Please enter a NIGP Code or leave blank!
Search Description:	<input type="text" value="Diploma"/>	
	Search	View All

In the search results, click on the numbers listed under *Class* to open the list of related NIGP codes. The class code is *not* the NIGP code.

Select the NIGP code that most closely relates to your intended purchase.

Class	Description
96600	PRINTING AND TYPESETTING SERVICES
NIGP Code	Description
96628	Engraved and Embossed Awards, Bonds, Certificates, Diplomas, Stationery, etc.

Dept. of Small Business and Supplier Diversity (SWaM) website.

More information about purchasing from a DSBDS Supplier can be found on the Procurement website [here](#).

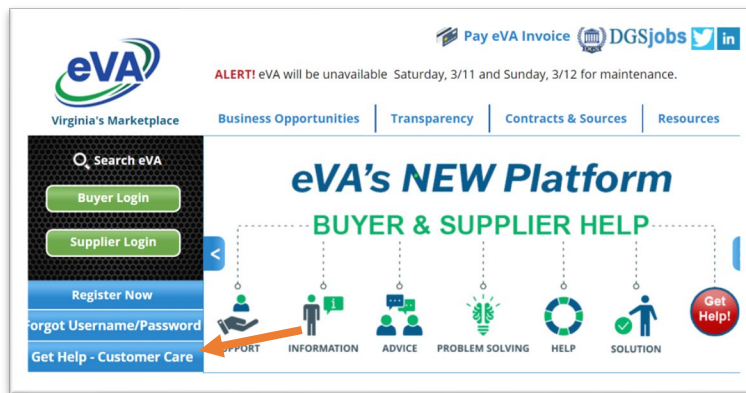
Select the link for the **Dept. of Small Business and Supplier Diversity (SWaM)**.



On the DSBSD website, select the Certification Division menu. From the dropdown, select *Small Business & Supplier Diversity SWAM & DBE Directory*. Scroll midway down the page and select the link to the directory.

You may also use the additional search filters on the left side of the page to narrow down your results.

Get Help - Customer Care, found on the left side of the eVA Home Page, can help with Browser issues or eVA system complications.



Getting Organized- Questions to Ask Before You Buy

Before entering an order into eVA, you must first ask yourself (or your supervisor) a few basic questions.

Do you have permission to buy?

As of September 2021, [Cabinet level approval](#) is required for all purchases over \$1,000.

Some specific subsets of items are purchased exclusively through specific campus buyers. For example, letterhead is purchased through Design Services, and technology purchases are purchased through Procurement Services. If you are unsure if the item you're trying to procure is purchased through a specific campus buyer, please 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 there 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](#) webpage for information on FOAPAL descriptions and restrictions.

Is the item being purchased from a mandatory source or on a 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 some exceptions. The exceptions are listed on the [Direct Pay Table](#) and will be paid by check after you have

completed a Banner Direct Pay. (Please visit the [Finance Training Calendar](#) for Direct Pay training classes.)

If your purchase is exempt from eVA entry, and your selected supplier accepts the credit card, you may place the order directly with the supplier and provide your charge card number via telephone. To determine if your order is eVA exempt, please consult the [Small Purchase Procedures](#).

Have you followed procedures for supplier selection? Is the supplier registered in eVA and/or a certified micro business supplier?

The University requires supplier to register with eVA. Purchases (not on contract and not exempt from competition) up to \$10,000 must be made with a certified micro business if the quote meets your specifications and the price is fair and reasonable (does not exceed 5% of the lowest quoted price from a non-certified micro supplier) By Order of the Governor, agencies are directed to set-aside purchases for fulfillment by these micro business suppliers. For additional details navigate to the [Small Purchase Procures](#) section of the Procurement Services website.

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

If the supplier you select accepts the card, the use of credit card is mandatory for payment. For registered suppliers, consult the eVA Supplier Look-Up section of this manual to confirm card acceptance.

Consult the [Small Purchase Credit Card manual](#) for proper card use.

Does the supplier accept electronic ordering?

The preferred ordering method for registered suppliers is noted on the eVA Supplier page within eVA. Orders that are not accepted electronically will require your final approval and distribution to the supplier.

Does the supplier have a PunchOut catalog?

PunchOut catalogs are a means for suppliers to make their online catalog available through eVA. Items ordered from a PunchOut catalog are managed differently from regular catalog and non-catalog orders.

Is the supplier active with a Cardinal ID?

If paying by check, the supplier must be active in Banner 9 and have a Cardinal ID number. Instructions can be found on the TESS website in the Purchasing Resource Guide [here](#).

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 supplier and the university. NIGP 96216 is a code commonly used for shipping. 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 a credit card are assigned Purchase Order (PO) numbers and routed to Banner. Receiving must be completed in Banner before payment can be made. Your eVA training includes instructions on how to complete 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 supplier invoice if it is delivered to your office?

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

Supplier Selection and Searching

University buyers are responsible for procuring goods and services for their respective departments in accordance with all mandatory Commonwealth and University procedure. This section is intended to inform departmental purchasers of their responsibility to select appropriate suppliers for all small purchases, either through the use of existing contracts or by selecting a SWaM certified micro business. These practices should be followed regardless of payment method.

Contracts

UMW Contract opportunities 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 Contracts 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.
- University Exclusive Contracts – As with Mandatory Contracts, the use of University Exclusive Contracts is required for all UMW cardholders in the purchase of the goods or services outlined in the terms of each contract. A list of University Exclusive Contracts can be found on the [Procurement Services Contracts webpage](#).
- 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](#) can be found in eVA.

Please Note: 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 that are available 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 Certified Micro-Business Requirements

If there is no existing contract that meets your needs, you should take specific steps to procure the goods or services from a micro-certified business. The Commonwealth of Virginia mandates that state agencies *set-aside procurements valued up to \$10,000 for micro businesses*. Suppliers who meet specific criteria are eligible to be certified by the Department of Small Business and Supplier Diversity (DSBSD) as a micro supplier.

How to Search for Certified-Micro Businesses

1. Searching in DSBSD

On the [eVA Homepage](#), from the Resources dropdown, select the Department of Small Business and Supplier Diversity. [Navigate to the Directory Listing on the DSBSD website](#).

Click the green filter button titled *Certification Type* and select *Minority Owned* and *Apply*.

You may choose to enter additional qualifiers such as NIGP code and/or zip code.

2. Search within eVA using the *Suppliers* menu. See [Searching> Suppliers](#) for more information.

What to do with the Search Information

The Information gathered from the report(s) will be used to determine which certified micro business can provide the good or service. You must purchase from the certified micro supplier if specifications are met and the price is fair and reasonable.

Fair and reasonable means the price does not exceed 5% of the lowest quoted price from a non-certified business)

Questions to ask the Supplier- responses are the Quote.

- Will the good or service be available when requested?
- Can the supplier meet the delivery date and time?
- What is the cost of the item or service?
- Can the supplier satisfy the quantity requirement?
- Is there a shipping charge?

Documented Quote

If the micro supplier cannot meet your purchasing specifications, document the reason in writing, date, and save the information within your procurement file. You will document that

you have the SWaM micro quote on file within the eVA order Comments section and documented within Works. For purchases up to \$10,000, one qualified certified micro quote is required.

Quotes expires after 6 months.

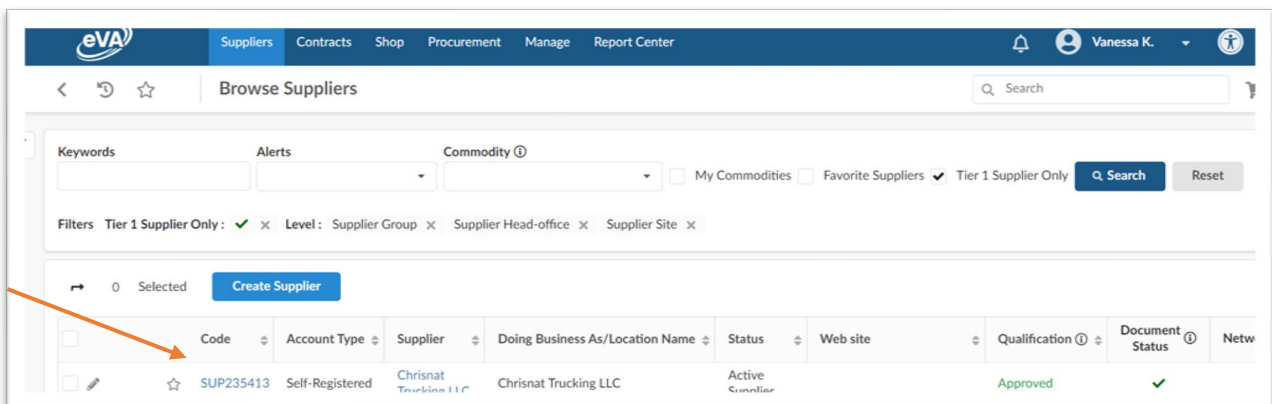
Detailed information can be found on the [Procurement Services](#) website under Laws, Policies and Procedures.

Supplier Payments

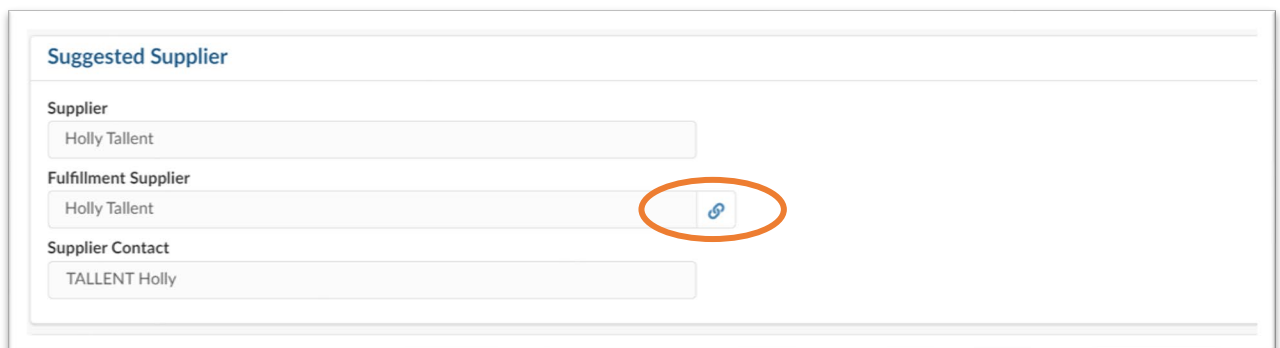
Charge Card Payment Acceptance

The Supplier record within eVA contains information on accepted payments and ordering methods. Supplier information can be accessed by clicking on the Supplier name or code within the Suppliers > Browse Suppliers search results (A). Or by clicking the link icon beside the Fulfillment Supplier filed within the line item of an order (B).

A.



B. Suggested Supplier found within a line item on purchase order.



Navigate to Company Information located on the left blue side menu. Scroll down to the *Accept Charge Cards* field to view accepted payment method.

If a vendor accepts electronic orders, you will see “URL” in the *Preferred Ordering Method* field. If the word “Print” is listed this means you will need to email a copy of the order directly to the vendor.

The screenshot displays the eVA Supplier Profile for Chrisnat Trucking LLC (Active Supplier). The page is divided into a left sidebar with navigation links and a main content area. The sidebar includes links for Supplier Overview, Company Information, Contacts, Documents & Certs., Qualifications, Risk Center, Sub-Tier Network, Analysis, Addresses, P2P Information, Activity, and Performance. The main content area shows the following fields:

- Limited Liability Company (LCC, LC, Ltd., Co.)
- Disregarded Entity
- Supplemental Organizational Type
- Tax Exempt
- Accept Charge Cards (with an orange arrow pointing to it)
- Accepts VISA
- SWaM ①
- Supplier Delivery Methods
- Preferred Ordering Method (highlighted with an orange box, showing URL)
- Unique Entity ID ①

On the right side, there is a 'Memorandum' section with a 'MoA' (Method of Acceptance) section showing 'Accepted' and 'Accepted by'.

Deposits

Suppliers may require a deposit for large dollar orders or technology. The requirement and amount of the deposit must be disclosed in advance of the purchase, included within the quote, and noted within the contract (if applicable). When entering the order into eVA:

1. The deposit amount should be clearly indicated on a separate purchase order Line Item with the description of *Deposit*.
2. In the Item Description field, include that the deposit should be refundable if good or service is not provided according to purchase order due date.
3. If paying the deposit by check, include the date the deposit is due. If there is not a separate contract with the supplier outlining deposit amount and due date, the supplier will need to send an invoice for the deposit.
4. Deposits paid by check will require the Banner Receiving function on the line item. Send the supplier invoice or contract to Accounts Payable with the Banner Receiving Y number clearly visible on the document.

Suppliers Paid by Check

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

1. Search for the supplier in the Cardinal Verified Supplier Report found within the SharePoint Reporting Center. The Report Center can be accessed on the Tess website under [Finance Reporting](#).

Suppliers not listed on the SharePoint report must begin setup by completing the [Supplier Questionnaire](#). (located on the Accounts Payable website)

Foreign Suppliers

If using a foreign supplier, contact Accounts Payable for assistance via 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 supplier/individual. The supplier registration application or a W9 CANNOT be used for foreign suppliers.
- 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 supplier 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 within the eVA Fed Id field -999999999. In some circumstances the payment may be reduced by 30% if the service is performed in the U.S. and the supplier does not have a U.S. Federal ID number.

Searching within eVA

Begin Searching for Requisitions, Orders and Suppliers by using the corresponding menu located in the top blue menu bar. The Favorites (star) function is used to bookmark your frequently used Suppliers, and requisitions.

Requisitions

1. Navigate to the Procurement menu, select Browse Requisitions.

The screenshot displays the eVA Procurement interface. At the top, a blue navigation bar contains the eVA logo and menu items: Suppliers, Contracts, Shop, Procurement (highlighted), Manage, and Report Center. Below the navigation bar, a 'Welcome to eVA' message is visible. A dropdown menu is open under 'Procurement', showing options: Browse Requisitions, Create Requisition, and Create Confirming Order. Below the dropdown, there is a search section with fields for 'Keywords' and 'Reference Number', a 'My Requests' checkbox, a 'Search' button, and a 'Reset' button. At the bottom, there is a 'Filters' section with 'My Requests' and a green checkmark icon.

2. To view your Requisitions select the *My Requests* check box.
3. Click *Search*.

A list of all requisitions containing your name as the Requestor will appear.

Note! If you place an order on behalf of another User AND change the requestor to their name, the requisition/order will not appear under your requisitions/orders. You will need to search using their name as the Requestor.

4. Enter keywords to execute a broad search. Click *Search*.
5. Click the *funnel icon* to open the advanced filter.

Additional search options will appear. Ie: Supplier, Order Date, Requestor, Type (purchase/confirming), Status (draft, in progress, rejected, etc.)

6. Click *Search*.

Note: as you select filter options you will see a list of all filters applied to the search. Click *Reset* to clear all filters or the X to remove individual filters.

Expected date format: M/d/yyyy

Keywords: fence External Code: [] [Search] [Reset]

Filters Keywords: fence X Order (min): 11/20/2022 X Order (max): 11/27/2022 X

Header

Supplier []

Date [Min value] [Max value]

Type []

Organization []

Select Contract []

Tax Rates []

Commodity []

Program []

Orders

Once a requisition is fully approved it becomes an order containing a new numerical value with a prefix of PO (non-credit card order) or PCO (credit card order).

1. Select *Browse Orders* from the Procurement menu.

Browse Orders

ALERT! State offices and eVA Customer Care will close at 12:00noon, Wednesday, November 2

Expected date format: M/d/yyyy

Keywords: [] External Code: [] [Search] [Reset]

Purchase Order #	Version #	PO Supplier	Purchase Requisition
PO04150272	1	Synthlink LLC	11.21.22 Synthlink

*You may enter Keywords, or the order number.

*The *External Code* field is used to search orders converted from Legacy eVA. (ie. EP1234567)

NOTE: Orders entered 24 months prior to November 2022 converted into NextGen eVA. They are searchable by the old EP or PO number. If the order is older than 24 months the order can be viewing using the 200 report in the eVA Report Center.

2. Select the *funnel icon* to expand the advanced search filter. A list of searchable fields will appear. You may search by Order Date, Requestor, Supplier, Status (ie. draft, rejected, ordered). **Note:** as you select filter options you will see a list of all filters applied to the search. Click *Reset* to clear all filters or the X to remove individual filters.

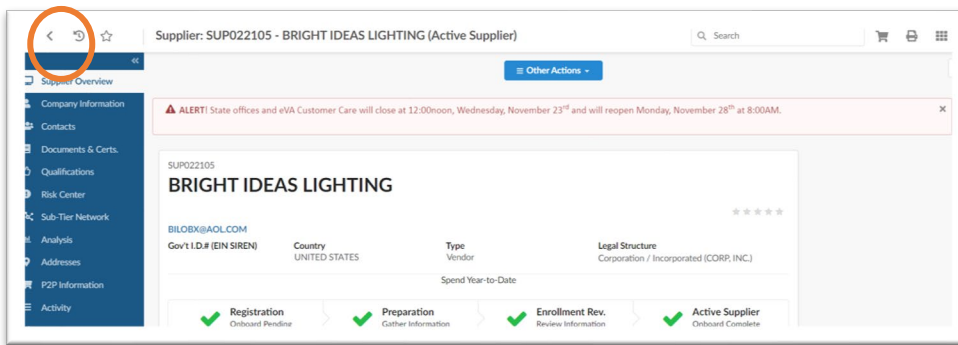
Suppliers

1. Select *Suppliers > Browse Suppliers* from the top blue menu bar.

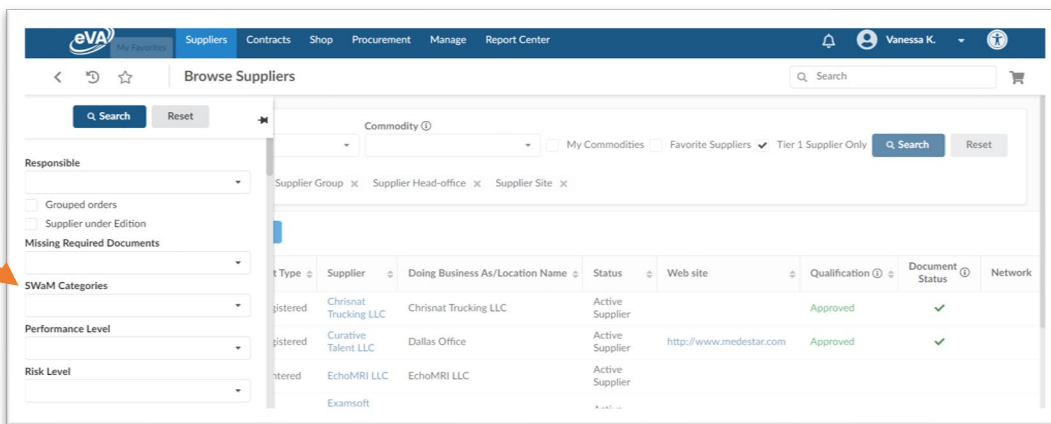
Enter Keywords or select *Favorite Suppliers* to view a listing of Suppliers you added as favorites.

2. Select *Search*.
3. You may add your supplier to *Favorites* by clicking the *star icon* to the left of supplier code. (see Favorites)

4. Clicking on the Supplier name will bring you to the Supplier information page which contains company information, contacts, documents & certs (ie W-9), and addresses. To return to the search results select the < arrow,



1. To search for a micro business, or other SWaM category use the advanced search menu by clicking the *funnel icon* located in the upper left portion of your screen.
2. Select *micro business* by using the *SWaM Categories* dropdown menu.

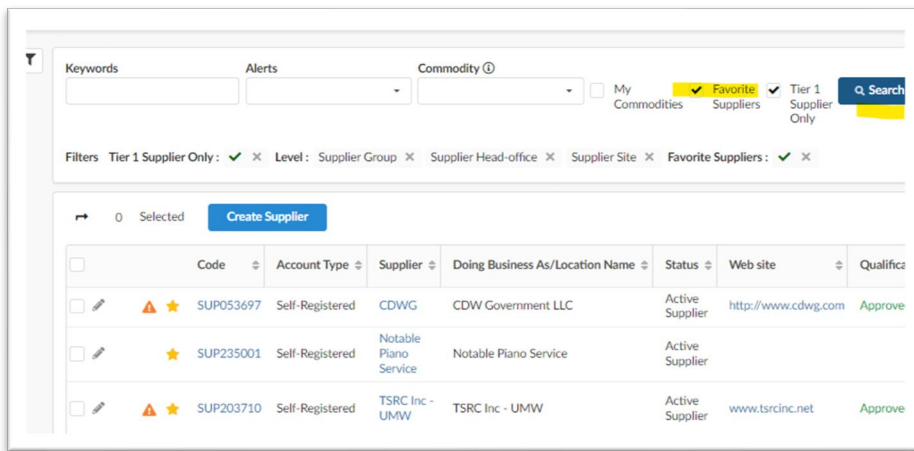


Favorites

The favorites feature is used to bookmark favorite Suppliers, Catalogs, and Requisitions commonly referenced.

Supplier

1. Search for a supplier using the search function, click the *star icon* to add the Supplier your favorites.
2. Your favorite suppliers can be viewed under the Supplier> Browse Suppliers menu and selecting Favorite Suppliers.
3. Unregistered suppliers must be contracted to register. See [Confirming Orders](#) for the registration and Requestion entry requirements.



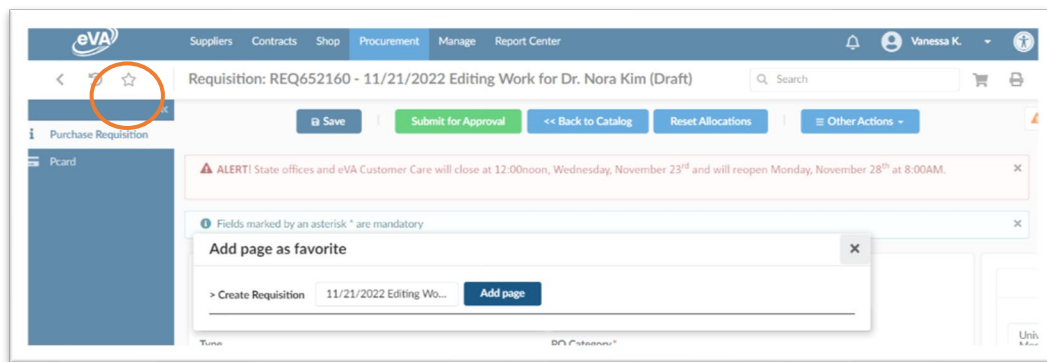
**Favorite Suppliers* are also visible in the Supplier field within the line item of a Requisition.

Requisition

It may be helpful to bookmark requisitions frequently referenced or copied.

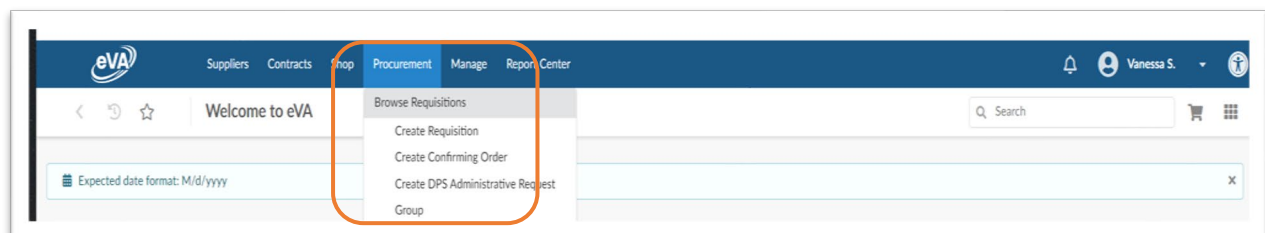
1. Locate the requisition by using the Requisition Search procedures.
2. Click the *Star* icon.
3. Add page as favorite. Edit the title of the requisition or click *Add page* to save as a favorite.

Note: To view a listing of all bookmarks click the Star icon beneath the eVA logo.



Creating a Non-Catalog Requisition

1. Select *Procurement > Create Requisition*



Header Window

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

- Name***: Office Supplier
- Organization***: A215-Security
- Type***: Purchase
- PO Category***: R01 - Routine
- Requester***: Chapman Vickie
- Reference Number**: (empty)
- Procurement Transaction Type***: Supplies - Non-Technology
- Comment**: Supplier, no partial shipments. Please ship all goods by Delivery Date

1. **Name**: Insert a Title that is meaningful to you. Adding today's date is helpful for tracking.
2. **Type**: Defaults to Purchasing.
3. **Requestor**: Defaults to your name.
4. **Procurement Transaction Type**: Use the dropdown menu to select the best description for your purchase.
5. **Organization**: Defaults to your grouping within eVA. Do not change this field.
6. **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).
7. **Reference Number**: This is a searchable field you may use as needed. If re-opening an EP from the original eVA, enter the EP number in this field. This will help track the new order.
8. **Comment (Supplier)**: Enter comments you'd like visible to the Supplier and include the Contract number. Do not enter micro supplier quotes or information, however, you may state that you received a quote from a micro-supplier
9. Click the **Save** button.

The **Save** button will Expand the window view to include the default of *Ship to* and *Bill to*.

Changing the Ship To Address

If you need to change your default "Ship To" on a requisition you must first update that address on the requisition header.

1. Scroll to the far right of the header screen and use the dropdown menu to select the appropriate address
2. Click **Save**

Requisition: REQ193629 - Mass Edit Lines-Change Ship To Address (Draft)

Q Search

Save Submit for Approval Back to Catalog Reset Allocations Create Solicitation Other Actions

Ship to

Ship to*

[TEST 12-12-20 4755 Red Brick Lane Oxford] Oracle 19 PROO Verification - TRob 1111 East Broad Street

10 South Street Key West Key West
 Anne's Ship To 555 Tree Limb Avenue Columbus
 AWS Testing Main Richmond
 eVA Administration 1111 East Broad Street Richmond
 jbe Test Test Richmond
 KHM ADDRESS DELETION TEST_072822 9179 Chamberlayne Rd Mechanicsville
 LISA LISA LISA Test Jon Jon
 Test Address 2020 1111 East Broad Street Richmond

See All

Bill To

Bill To*

Oracle 19 PROO Verification - TRob
 1111 East Broad Street
 Suite 7023
 Richmond Virginia 23218
 UNITED STATES

NOTE: Your default address will be passed to the supplier for each line item.
 Update the "Ship To" address for each line item that may differ from the default.

For multiple line-item requisitions requiring a "ship to/bill to" address change, take the following steps:

1. Click the box at the top of your list of line items to mass edit all the lines.

Items & Services

Selected + Add Line Copy Selected Lines Delete Lines Edit Lines Set Allocations

	Item #	Product Type	Supplier Part #	Item Description	Supplier	Order Qty	Order U
<input type="checkbox"/>	1	Product	100	Computer Programming Services - Mainfram...	(EIDEN SYSTEMS CORPORATION) EIDEN SYSTEMS CORPORATION	1.00000	Hour
<input type="checkbox"/>	2	Product	106	Programming Software Engineering, OOA, O...	(Building Industrial Supplies) Building Industrial Supplies	1.00000	Hour
<input type="checkbox"/>	3	Product	3150465	Metal door, 18 gage flush standard honeyco...	(Creative Glass Inc) Creative Glass Inc	1.00000	Ea
<input type="checkbox"/>	4	Product	3150340UL	Metal door, 18 gage flush standard honeyco...	(Creative Glass Inc) Creative Glass Inc	1.00000	Ea
<input type="checkbox"/>	5	Product	315034UL	Metal door, 18 gage flush standard honeyco...	(Creative Glass Inc) Creative Glass Inc	1.00000	Ea

5 Result(s)

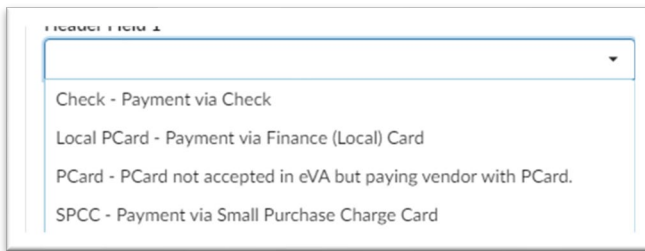
2. Select the pencil on any of the line items to edit, scroll to the far right of that item screen, edit the "Ship To" address and select the correct "Ship To" address for all the line items on the requisition.
3. Click "Save and Close"

Header Field 1

Open the *Header Field 1* dropdown options to indicate payment method. This field is mandatory.

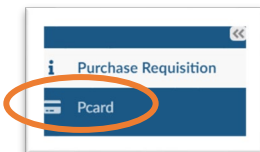
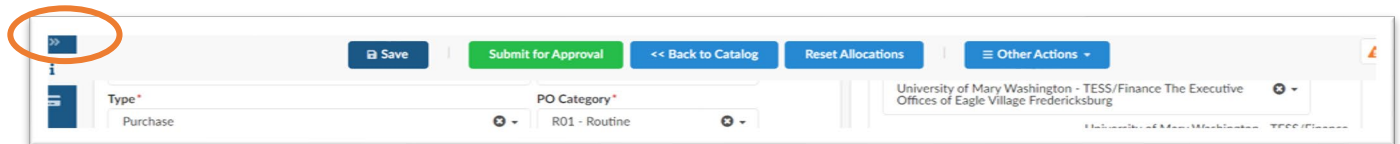
Note! This field is used for internal purposes and **does not** replace adding your PCard to the order.

1. Choose from the following:



Adding the Pcard

1. Click the *right arrows* to expand the blue menu bar.
2. Click the *Pcard icon* to add your Pcard to the requisition.
3. Click the *Save* button. Scroll down to *Items & Services*.



NOTE: If you select your pcard and receive an error message after you click *Submit*, this indicates the Supplier does not accept pcard within eVA.

You'll need to remove your Pcard and change Header 1 to: "*Pcard not accepted in eVA but paying with Pcard*"

Item & Services

Select *Add Line* to open the *Item Details* Window.

Item Description

1. *Product Type*: Defaults to Product. Drop down selection includes Freight, Shipping and Services.
2. *Detailed Description*: Enter the detailed description of your item.
3. *Commodity*: type in word, code, or use the dropdown to find the commodity that best describes the item.
 - a. Note: Add shipping on a separate line item using commodity code 96286.
4. *Delivery Date*: Select the date for delivery. **Note: Delivery dates will default to 30 days unless dates are entered on the calendar.**
5. If services were selected in Product Type, use the From and End dates.

- a. **Important:** if you do not select a Delivery Date the date will default to 30 days. If left empty, the Supplier may delay the order by 30 days based on the default.

Estimate Costs

1. **Quantity:** enter the quantity, then scroll up to enter price.
2. **Unit Price:** Enter price of good or service.

Suggested Supplier

1. **Supplier:** Type in the name, use the drop-down menu or select *See All* to select a Registered Supplier. You may view your favorite suppliers by selecting *See All*

Unregistered Suppliers can only be entered when creating a Confirming Order. See [Confirming Orders](#) for more information.

REMINDER: for non-credit card purchases – you must verify the Supplier is active in Banner and has a Cardinal ID PRIOR to eVA Entry. If the Supplier does not have a Cardinal ID and active Banner record, your order will be rejected until the Supplier is properly set up to do business with UMW.

Information can be found on the TESS website under [Purchasing Resource Guide > Cardinal ID](#).

Internal Additional Details

1. *External Contract Number:* You may enter the UMW contract Number here, but you **Must** enter the Contract Number in the *Supplier Comments* field. If choosing to enter on individual line items, the contract number must be added to each line.
2. Click *Save*.

Copying Line items

1. Select the check box beside the line item you'd like to copy.
2. Select *Copy Selected Lines* button. It is beneficial to copy line items when possible. Copying a line will also copy the supplier and FOAP.

The contract number does not copy over. You'll need to enter on each additional line.

The screenshot shows the 'Items & Services' interface. At the top, there's a header 'Items & Services'. Below it, a toolbar contains buttons: '1 Selected', '+ Add line', 'Copy Selected Lines' (highlighted in yellow), 'Delete Lines', 'Edit Lines', and 'Set Allocations'. Below the toolbar is a table with columns: 'Item #', 'Product Type', 'Supplier Part #', 'Item Description', 'Supplier', and 'On Hand'. The table has one row with the following data: '1' in the 'Item #' column, 'Product' in the 'Product Type' column, 'Notebooks' in the 'Item Description' column, and '(# 1 OrderAnything) # 1 OrderAnything' in the 'Supplier' column. The 'On Hand' column is empty. To the left of the first row, there is a checked checkbox and a yellow highlight.

*You may use the *Set Allocations* button to edit allocations for multiple line items at one time.

*Reset allocations will clear allocation information for the selected line(s).

1. Click *Save* then *Save and Close*. You will return to the purchase order Header window options.
2. Scroll down to Attachments.

Allocations

1. Scroll down to the Allocation section.
2. Enter the Fund, Fiscal Year, Organization Allocation, Program Allocation and Account codes.
3. Click *Save and Close*

*See [Split Coding](#) for information about splitting payment between two funding sources.

Split Coding

1. Select the +Allocation button to split code by % or dollar value.
2. The total amount split must equal the total value of the line item. *Remaining To Allocate* must equal zero.

The screenshot shows the 'Item Details' window with a 'Remaining To Allocate' section at the top. Below this is a table with columns: Fund*, %, Amount, Allocations Quantity, Fiscal Year*, Cost center, and Activity. The table contains two rows of allocation data. A green arrow points from the '+ Allocation' button to the 'Remaining To Allocate' section.

Fund*	%	Amount	Allocations Quantity	Fiscal Year*	Cost center	Activity
3511 - Comp Fee Auxiliary	50.00 %	25.00		2023 - eVA-Wide Legal		
1111 - State Educational and General-SPCC	50.00 %	25.00	1.00000	2023 - eVA-Wide Legal		

Attachments

1. Click on the *New Document Button* If you would like to add an internal attachment and/or an attachment for the supplier.
2. Select *document type*
3. *Title Window*: enter the name of the document. Title will be visible on the purchase order.
4. *Information Window*: Select the Click or Drag to add files to select your document
5. Click the *Save and Preview* button and then *Close* to return to the PO Header.

Internal Comments Window

1. Enter your procurement quotes, coding, approvals and messaging.
2. Click the *Save* button
3. Internal comments are not visible on the PO level. You must navigate back to the requisition to view these comments.

Review the Requisition Prior to Submission

Always review all content on the requisition prior to submission. Below is a list of fields that require a secondary review.

View the Requisition via the Print Function

Use the print icon located at the top right corner of the requisition window to review full order details.

Use the *Workflow Preview & Ad Hoc* button to view the Approval Flow.

Ensure that your order has all necessary parties added to your order.

Review the *Pcard* icon

Ensure the order has the appropriate charge card on the requisition. If you have changed the Requestor and their card will be used on the order, ensure the card is listed the Pcard section

The *Messaging* Function

The Messaging function is a communication tool between buyers and approvers, is used when orders are rejected and require additional details, is used for notes on the requisition for fixed asset or system tracking needs. Ensure your message is for Internal use Only.

Internal Comments and Attachments

The bottom of the Requisition Header is Internal Comments and Attachments. Comments entered in this area are related to procurement regulations and rules such as approvals, quotes, Clothing Table backup and the like. Ensure your attachments were saved as expected and are clearly defined for Supplier or Internal use only.

Supplier Comments

At the top of the requisition is a field for *Supplier Comments*. This is the placeholder for contract number and needed comments to the supplier. Anything in this field will print on the Purchase Order.



Change Orders

Change Orders are initiated on the Purchase Order. Each change will create a new Requisition number.

Change Orders are amendments to the original order and historically posted on each order as changes occur. For historical review, it is important that each change contain accurate description of what is edited on the order.

1. Navigate to the *Procurement>Browse Orders* menus.
2. Select the Purchase Order that requires the change.
3. Select the *Change Order* button at the top of the page.

Change Order Window

1. *Significant Change Request* will default.
 2. *Amend #* will populate based on how many amendments have taken place
 - a. The Amend number(s) will show on the purchase order once the order is fully approved.
 3. *Change Type(s)*: Open the drop down and choose one or several reasons for the Change Order.
 4. *Description of Changes*: Enter additional information on the change requirement, be as specific as possible. This description is not visible on the printed order. (see example below)
 5. Click *Save*.
 6. Scroll down and edit line item(s) as needed.
 7. Use the Messaging feature to further comment to the Approvers. Submit the Message before submitting the Order.
- Note!** All Purchase Order changes (amendments) are tracked on subsequent Change Orders. Buyers and Approvers can open any amendment to view past amendments.

The screenshot shows the 'Change Order' form. At the top, there are buttons: 'Save', 'Submit for Approval', '<< Back to Catalog', 'Reset Allocations', and 'Other Actions'. Below these is a note: 'Fields marked by an asterisk * are mandatory'. The form has a section titled 'Change Order' with the following fields:

- 'Significant Change Request?' with radio buttons for 'No' and 'Yes' (selected).
- 'Amend#' with a text input containing '1'.
- 'Change Type(s)*' with a dropdown menu showing 'Change Allocation' and 'Add New Item(s)'.
- 'Description of Changes' with a text area containing 'Adding a line for shipping costs (\$50.00)' and 'Changing the FUND code from 1111 to 3511 on line 1.'

Copying an Order

Orders can only be copied by navigating to the requisition.

1. Locate the requisition you'd like to copy, select *Other Actions > Duplicate*.
2. Edit the information as needed and submit.

The screenshot shows the 'Requisition: REQ852275 - Brolin Creative for CSP marketing Invoice #22 (In progress)' form. At the top, there are buttons: 'Close', 'Reject', 'Approve', '<< Back to Catalog', 'Reset Allocations', and 'Other Actions'. The 'Other Actions' dropdown menu is open, showing options: 'Duplicate', 'Generate a Quote', and 'Cancel requisition'. The form has a sidebar with 'Purchase Requisition', 'Workflow', and 'Pcard'. The main section is titled 'Header' and contains fields for 'Name' (Brolin Creative for CSP marketing Invoice #22), 'Organization' (A215-Nursing), 'Type', and 'PO Category'. The 'University of Mary Washington' logo is visible in the bottom right corner.

Canceling an Order or Requisition

1. To cancel an order, navigate to the purchase order and select the *Cancel PO* button.
2. Confirm the cancellation by selecting *OK* in the pop-up window.

1. To cancel a Requisition, navigate to the desired requisition and click the *Other Actions* button.
2. Select *Cancel Requisition*.
3. Confirm cancellation by selecting *OK* in the pop-up window.

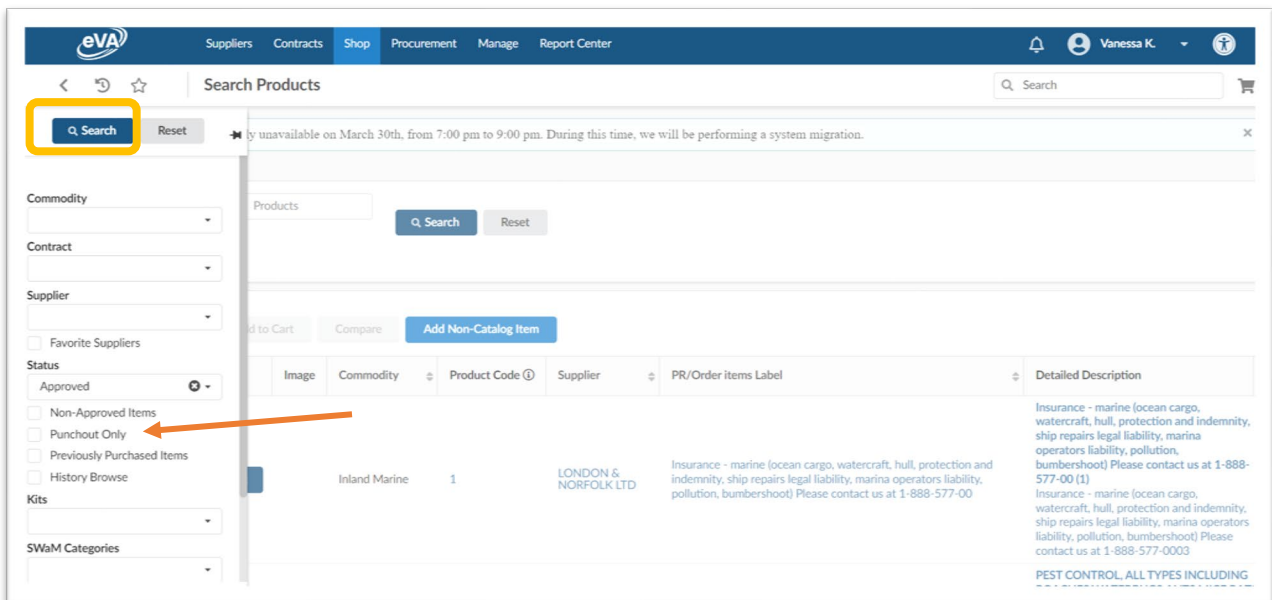
Punchout Catalog Orders

Summary: The purchase order is created within the catalog first, then the order is brought into eVA once check out is complete.

Note! Once the catalog is exited, you cannot direct back to the catalog for changes. You will need to cancel the Requisition and create a new Requisition. You CAN change quantity or delete line items.

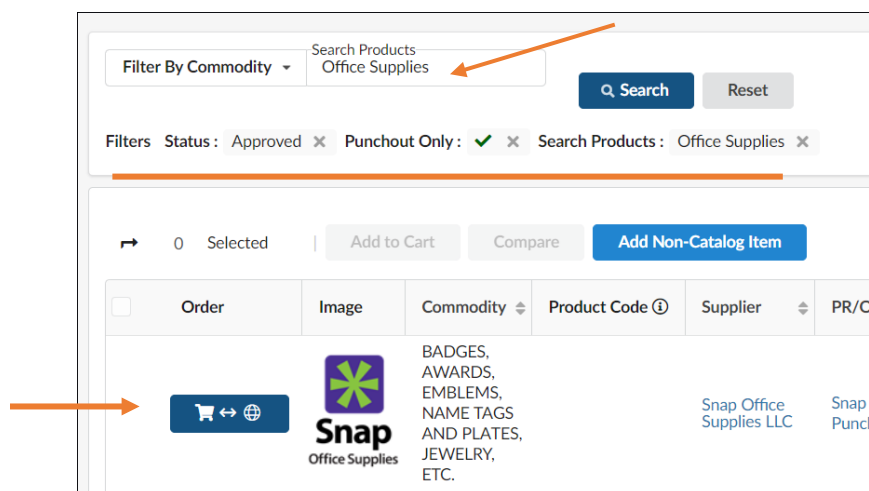
Search for Punchout Catalogs

- a. Select *Shop>Search Products* from the top blue menu.
- b. Open the advanced search filter and select the *Punchout Only* check box.
- c. Click *Search*.



- d. Narrow down suppliers by entering a commodity description in the *Search Products* field.

The example below uses “Office Supplies” in the Search Products field



- d. Click the shopping cart icon to enter the Punchout Catalog
 e. Add selected items to the *Cart*. When all items are selected, click the *Submit Cart* button.
 You will be automatically directed back to eVA to complete the order.

Header Window

- Name:** Insert a Title that is meaningful to you. The date is populated, we suggest leaving this for searching later on.
- Type:** Defaults to Purchasing.
- Requestor:** Defaults to your name.
- Procurement Transaction Type:** Type in *Supplies* and choose the appropriate category or use the dropdown menu.
- Organization:** Defaults to your grouping within eVA.
- PO Category:** User R01 for Routine Order unless instructed otherwise by Procurement.

- g. **Comment:** Enter specific comments to the Supplier here.
- h. **Add your Pcard:** Use the left blue side menu to select your Pcard. Use the dropdown to select the appropriate card. Click **Save**.
- i. Select **Purchase Requisition** to return to the PO Header.

Header

Name* 11/2/2022 TEST TSRC

Organization* A215-Finance

Type* Purchase

PO Category* R01 - Routine

Requester* Shurina Vanessa

Reference Number

Procurement Transaction Type* Supplies - Non-Technology

Header Field 1 SPCC - Payment via Small Purchase Charge Card

Status Draft

Comment Enter Supplier comments here. Scroll to the far right, under *Ship To* and *Bill To*

Save Submit for Approval << Back to Catalog Reset Allocations Other Actions

- j. **Header 1 Field:** Choose the appropriate payment method for this order. **Note:** this field is for internal communication only and does not replace adding your Pcard to the order.
- k. Click **Save** and scroll down to **Items & Services**

Pcard

Select Applicable Pcard

Save

Fields marked by an asterisk * are mandatory

Items & Services

Items you've selected from the Punchout catalog will be listed here.

Allocations

- a. Click the +Allocation button
- b. Enter the Fund, Fiscal Year, Organization Allocation, Program Allocation and Account

Split Coding - Split coding or split accounting is used to divide payment among multiple FOAPAL codes.

- i. Use the +Allocation button to split code by % or dollar value. The total amount split must equal the total value of the line item. *Remaining To Allocate* must equal zero.

Item Details

Save Save & Close Close Reset Allocations

Remaining To Allocate: 0.00000 USD

+ Allocation

Fund*	%	Amount	Allocations Quantity	Fiscal Year*	Cost center	Activity
3511 - Comp Fee Auxiliary	50.00 %	25.00		2023 - eVA-Wide Legal		
1111 - State Educational and General-SPCC	50.00 %	25.00	1.00000	2023 - eVA-Wide Legal		

Attachments

- a. Click *Apply and Close* to close the *Allocations* window.

Set Allocations

Apply & Close Close

Allocations

Chart of Account
University of Mary Washington

+ Allocation Template List

%	Fiscal year*	Organization Allocation*	Program Allocation*	Fund*	Activity	Campus	Account*
100 %	2023 - eVA-Wide Legal	101000 - President's Office Administration	10110 - General Academic Instruction	1111 - State Educational and General-SPCC			71312 - Office Supplies

Mass Editing Line items

This feature is used to add and/or update a *Delivery Date* or *Ship To* address.

- Select the checkbox in the *Item#* column to "select all". Click *Edit Lines* to apply mass updates to all items, for instance the addition of *Delivery Date* or *Ship To* address.
- To mass edit Allocations, use the *Set Allocations* button. This button will clear current allocations and apply a single FOAP to all selected line items.

Note: If you do not select a *delivery date* the date will default to 30 days. This could delay your order.

- Scroll down and choose the *Delivery date* field. Enter the date and select the *Add* radio button.
- Click *Save*, then *Save & Close*. You will be directed back to the requisition *Header*.

P.R. items mass update

Save Save & Close Close

Expected date format: M/d/yyyy

Field	Value	Do not copy	Add ⓘ	Replace ⓘ
Commodity		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supplier		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Order supplier		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Delivery date	11/12/2022	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Ship to

Mass Edit Allocations

1. Check the boxes to select individual line items. Select all line items by checking the top box.
2. Select *Set Allocations* to apply the same FOAPAL to all line items. **Note:** this will remove and replace any existing allocations.

Allocations

Chart of Account
University of Mary Washington


+ Allocation New Template

%	Fiscal year*	Organization Allocation*	Program Allocation	Fund*	Activity	Campus	Account*	Acc. Cross Reference	Organization ⓘ*

2 Result(s)

3. Click the *+Allocation* button to add FOAPAL information.
4. Click *Apply and Close*.

Messaging

The Messaging feature is available by selecting the orange triangle  on the right side of your screen. Approvers and Buyers can send messages to each other for the specific purchase order needs.

****Messages are not viewed by Suppliers nor visible on the purchase orders itself****

Note: Messages sent via the Messaging feature within eVA are not received in Outlook. They are viewed only while logged into eVA. The recipient will not receive an email notification for messages in eVA.

- You may communicate to Procurement and Approvers via messaging as your order moves through the workflow process in the event of a rejection. Procurement is not notified of messages via email.
- You may also use messages to keep notes about your order for future reference. (Messages will not print on a PO).
- Do not enter contract information, or other documentation related to your order in messages. This information should stay within the body of the purchase order.

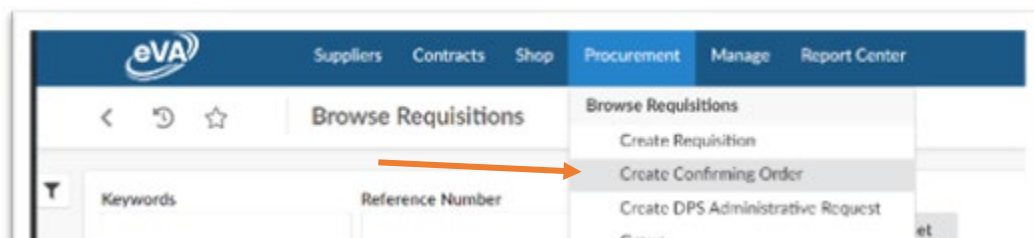
Confirming Orders

Confirming orders are created by using the **Procurement>Create Confirming Order** menu.

Note! Requisitions cannot be changed to *Confirming*. Cancel the existent requisition and create a new Confirming Order requisition.

Confirming Orders are used when:

- Entering a requisition to an unregistered supplier.
- Documenting the purchase after the good or services has been received.



Unregistered Supplier Entry

Doing business with a supplier not registered within eVA is an approved exception when:

- You have confirmed that the supplier is the **ONLY** provider for your good or service, and;
- You have requested in writing the supplier register with eVA

Provide your supplier eVA registration information by forwarding the web link from the UMW procurement site [directed to UMW Suppliers](#) or by providing the link within eVA [for Supplier support](#).

Specifics to Unregistered Supplier entry:

- a. Create *Confirming Order*
- b. Choose the correct payment method in Header Field 1. In most cases, payment will be via charge card, but If paying by check, ensure the supplier is listed on the Cardinal Verified Vendor report or take the necessary steps to get them entered into Banner. Review the [Supplier Payments](#) section entitled *Paying Suppliers by Check*.
- c. Complete the top half of the requisition and *Save*.
- d. Within Item Details>Suggested Supplier-check the box labeled *Unable to Register Supplier*, see screenshot below.
- e. Enter the name of the Supplier in the *Unregistered Supplier Name* field.

- f. Select *Save & Close*.
- g. Insert the name of the Supplier in the side *Messages* feature.
- h. Update Internal Comments to inform Procurement that you have performed all Due Diligence for the registration request.
- i. Be prepared to follow these steps each time you use an unregistered supplier. There is no reporting or tracking ability within eVA.
- j. Keep all documentation in your SPCC file.

Adding Additional Users to your Requisition Workflow

Buyers and Preparers have the option to add others to the requisition for the purpose of purchase order ownership, charge card use, or as an additional approver on the order. Adding users to your order will insert this user into the requisition workflow.

- When you are the preparer of the order, you are entering the order on behalf another buyer. Follow the specific procedures for OBO.
- When you require another individual to approve the order, follow the procedures of the [Ad Hoc Approver](#). You will also use this method when you remain the Requestor on the requisition but require the Accounts Payable Gold or Local card.

OBO-On Behalf Of (OBO)

If you are the preparer of the requisition (entering information onto the requisition *on behalf of* the department buyer), change the Requestor to the name of the buyer. If the department buyer's charge card is the payment method, ensure that you choose the correct dropdown for Header Field 1 and select the Requestors charge card in the Pcard field.

Specific to OBO orders:

- a. Change the Requestor name from your own to the department buyer.
Note: if changing the Requestor field after FOAPAL has been added to the requisition, a pop-up alert will confirm reset of allocations- click on Cancel to keep all accounting information.
- b. Enter your name in the Reference Number field
- c. Fill out the top half of the Header and *Save*
- d. Select the appropriate drop down from *Header 1*.
- e. If using the charge card for payment, select the *Requesters* charge card from the *Pcard* dropdown

The order will route to the Requestor first for approval, then follow all other approval workflow rules.

Ad Hoc Approver

Ad Hoc Approvers are added when an additional approver is required on a requisition and for purchases requiring the use of the Accounts Payable Gold or Local card.

Multiple Ad Hoc Approvers can be added to a single requisition.

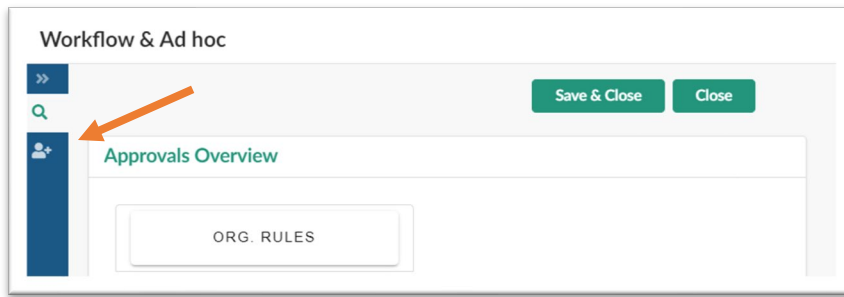
Specific to Ad Hoc Approver:

- a. Complete the full requisition and save prior to adding and Ad Hoc Approver.
- b. At the top of the requisition, select Workflow Preview & Ad Hoc.

The screenshot shows the 'Header' section of a requisition form. It includes the following fields and controls:

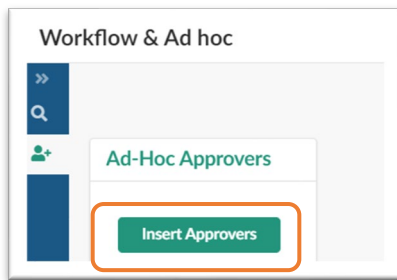
- Name***: Text input with 'test' entered.
- Organization***: Dropdown menu with 'A215-Security' selected.
- Type**: Text input with 'Purchase' entered.
- PO Category***: Dropdown menu with 'R01 - Routine' selected.
- Requester***: Text input with 'Koszyk Vanessa' entered.
- Reference Number**: Empty text input.
- Procurement Transaction Type***: Dropdown menu with 'Construction' selected.
- Header Field 1**: Empty dropdown menu.
- Header Field 2**: Empty dropdown menu.
- Status**: Text input with 'Draft' entered.
- Workflow Preview & Ad hoc**: A green button at the bottom right, indicated by an orange arrow.

- c. On the side blue bar, click the *+ person icon*.



- d. Within the *Ad Hoc Approvers* block, select *Insert Approvers*.

The order will route to the Ad Hoc Approver based on internal workflow rules. The Ad Hoc Approver may not be first in the approval process.



- e. Complete the Add Hoc Approver form:
- *Add Hoc Approvers* - type/search for the name of the person who will approve the order and/or add their charge card to the order. You may add more than one approver to the order.
 - *When* - choose *Before*
 - *Pre-Defined Rules*-view the workflow for your order (*Organization Rules*) and choose the first approval on the listing. This action changes the workflow to add you Ad Hoc early in the approval process.
 - *Reason* – enter instructions for the Approver. ie. “Please add your spcc card and approve” or “please review this order and approve.”
 - Click *Save and Close* and navigate back to the Requisition.
 - Insert the same Reason in the Messaging to ensure the Approver can easily identify the need

****The sample below shows “Chapman Jarred” added before the current Dollar 2 Approvers.**

Adhoc Approver

Adhoc Approvers

Adhoc Approvers*

Chapman, James

When*

☒ Before ☐ After

Pre-Defined Rule(s)*

Dollar 2 Approver must approve

Reason

Please review and add your pcard to this order.

Organization Rules

Rule	Sequence
Adhoc Approvers	69
Dollar 2 Approver must approve	70
Dollar 2 Approver must approve	70
Dollar 2 Approver must approve	70
Dollar 2 Approver must approve	70
Dollar 2 Approver must approve	70

Delegation

When out of the office, you may delegate your approval to another eVA allows users. Please contact TESS or Procurement prior to delegating your access.

1. Select *My Profile* from the User menu.

2. In the Delegation tile there are two choices: *Give my private access to* and *Give my approval workflow tasks to*. Only the *approval workflow* is available for delegation.

3. To give your approval workflow tasks to another user, select the name of the individual to whom you are delegating access to, and select the *From* and *To* dates. The delegated user will receive email notifications when there is a requisition requiring your approval. They will click on

the link to approve but cannot access your account.

Delegation

Give my private access to From To +

Give my approval workflow tasks to From To +

4

Approve or Reject a Requisition

Follow the steps below to approve, reject and/or add your credit card to a requisition.

- Login to eVA.
- Navigate to the *My to-do list* tile located on your eVA Dashboard. Your *My to-do List* shows all items that require your attention.
- Open the Requisition by clicking on the Title of the Requisition

Process	Requestor	#	Object
eVA Purchase Requisition	CHAPMAN Vickie	191393	REQ191393 - Amendment request 10/10/2022 PO03191391 (A215- Security - Chapman Vickie)

- To add your pcard to an order, select the pcard icon on the left blue navigation menu. Choose your pcard from the dropdown menu.
 - Click *Save*, then *Approve*. **Note:** if you forget to click *Save* your card will not be added to the requisition.
- To *Approve* or *Reject* an Order, use the appropriate buttons.
 - To *Reject* an order, click *Reject*.
 - Enter a detailed description within the Rejection window.

Reject Approve

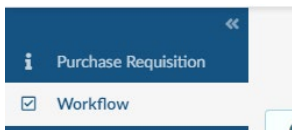
Header

Reason :

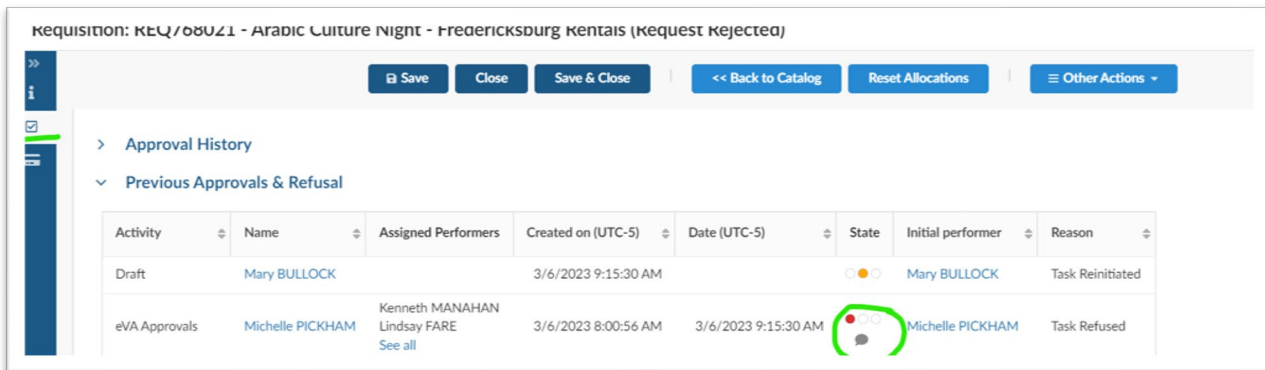
Please change the contract number to UMW45674

- Also add this description to the Messaging tool. The messaging feature is highly visible while the original rejection notes are located within the Workflow menu as noted below.

e. Rejected Order comments are visible via the left blue navigation menu.



- f. Select the *Workflow Menu*
- g. Scroll down to *Previous Approvals and Refusals*
- h. Click on the *conversation bubble* to view rejection details.



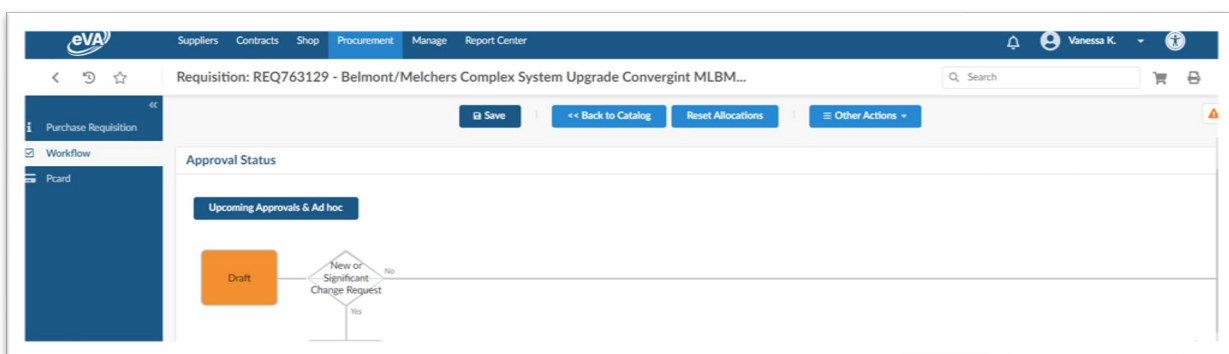
Workflows

This section will help you navigate through the Workflow menu determine where your order is within the approval process.

- a. Open a requisition and navigate to the Workflow Menu located within the blue side menu. Click the double arrows (<<) to open the menu descriptions.

Approval Status

The Approval Status map depicts a view of your purchase order status. The requisition begins in *Draft* status, moves through *approvals* then becomes a purchase order.



Upcoming Approvals & Ad-hoc

By selecting the *Upcoming Approvals & Ad-hoc* button you can see a full view of all upcoming approvals including ad-hoc approvers (if added).

Each Approval Profile represents an area required to approve the requisition. Multiple approvers may constitute a single Approval Profile - only one approver from the group is required to approve.

Workflow Preview				
Approval Profile	Approver	Type	Rule Label	Rule Order
Vendor Approver	Vanessa Koszyk	Organization Rules	Banner Valid Supplier Confirmation	4
Vendor Approver	Vickie Chapman	Organization Rules	Banner Valid Supplier Confirmation	4
Fixed Asset Approver	Anthony Dahm	Organization Rules	Account Code Approver must Approve	50
Fixed Asset Approver	Arin Doerfler	Organization Rules	Account Code Approver must Approve	50
Fixed Asset Approver	Melinda Albrycht	Organization Rules	Account Code Approver must Approve	50
Budget Approver	Kathryn Wheeler	Organization Rules	Dollar 1 Approver must approve	60
Budget Approver	Pamela Taggert	Organization Rules	Dollar 1 Approver must approve	60
Budget Approver	Sheila Williams	Organization Rules	Dollar 1 Approver must approve	60
QMGT	Kenneth Manahan	Organization Rules	Dollar 2 Approver must approve	70
QMGT	Lindsay Fare	Organization Rules	Dollar 2 Approver must approve	70
QMGT	Melva Kishpaugh	Organization Rules	Dollar 2 Approver must approve	70
QMGT	Michelle Pickham	Organization Rules	Dollar 2 Approver must approve	70
QMGT	Patricia Canciglia	Organization Rules	Dollar 2 Approver must approve	70
13 Result(s)				

Approval History shows a listing of approvals that have taken place.

The *State* column shows the status of the approval.

- Green – complete
- Orange – in process
- Red – rejected
- Comment bubble-open to view comments entered with order was Rejected.

Previous Approvals & Refusal

Activity	Name	Assigned Performers	Created on (UTC-5)	Date (UTC-5)	State	Initial performer	Reason
Draft	Mary BULLOCK		3/6/2023 9:15:30 AM			Mary BULLOCK	Task Reinitiated
eVA Approvals	Michelle PICKHAM	Kenneth MANAHAN Lindsay FARE See all	3/6/2023 8:00:56 AM	3/6/2023 9:15:30 AM		Michelle PICKHAM	Task Refused
Requester Approval	Mary BULLOCK		3/4/2023 12:43:55 PM	3/4/2023 12:43:55 PM		Mary BULLOCK	Task Refused
Generate Rules	Mary BULLOCK		3/4/2023 12:43:55 PM	3/4/2023 12:43:55 PM		Mary BULLOCK	Task Refused
WF Engine Control	Arin DOERFLER		3/6/2023 8:00:56 AM	3/6/2023 8:00:56 AM		Arin DOERFLER	Task Completed
eVA Approvals	Arin DOERFLER	Anthony DAHM Melinda ALBRYCHT	3/4/2023 12:43:55 PM	3/6/2023 8:00:56 AM		Arin DOERFLER	Task Completed
Generate Rules	Mary BULLOCK		3/4/2023 12:43:55 PM	3/4/2023 12:43:55 PM		Mary BULLOCK	Task Completed
Requester Approval	Mary BULLOCK		3/4/2023 12:43:55 PM	3/4/2023 12:43:55 PM		Mary BULLOCK	Task Completed
Draft	Mary BULLOCK		3/4/2023 12:43:55 PM	3/4/2023 12:43:55 PM		Mary BULLOCK	Task Completed
9 Result(s)							