

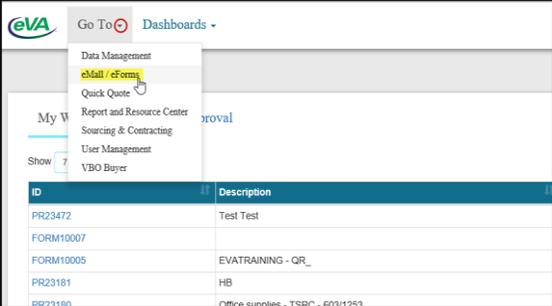
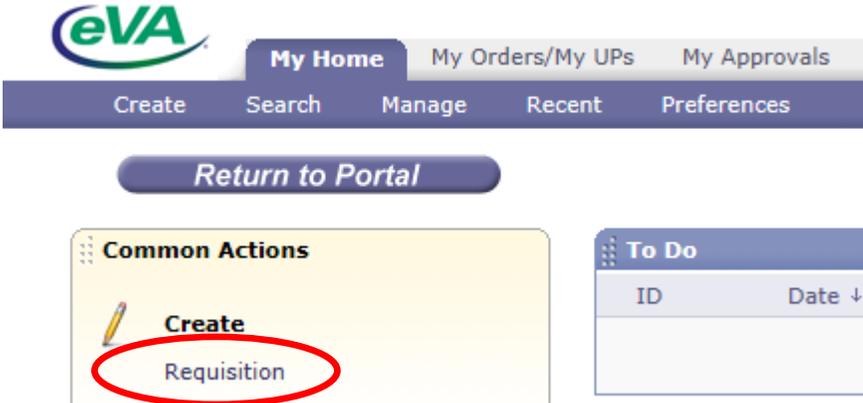
QUICK STEPS FOR A CREATING A *REQUISITION*



What This is a handy reference for you to use when creating a *Purchase Requisition*.

How You must have an active eVA buyer login and *eMall* must be an enabled application on your account.

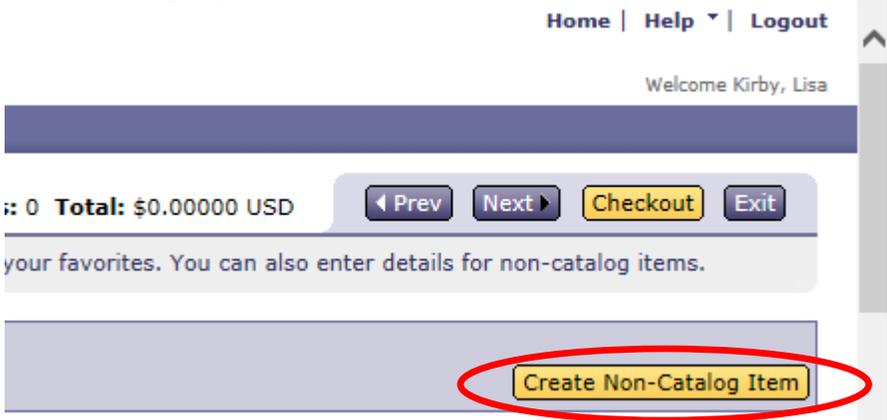
For more detailed information on the entire eMall application, read and review the eMall Training Guide available in the Reports and Resource Center under the Documents tab.

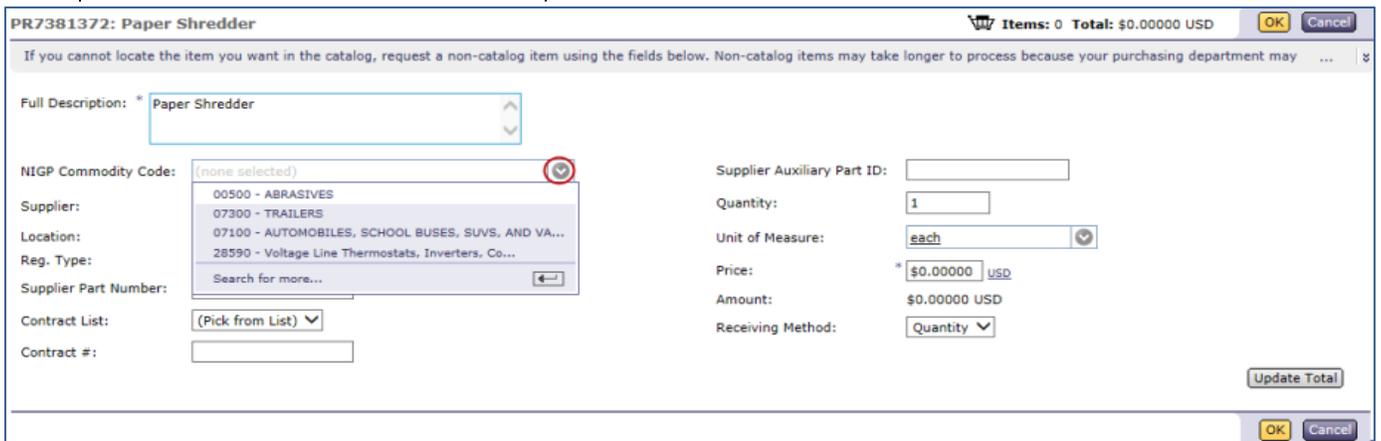
Step 1	In internet browser go to: www.eva.virginia.gov	Enter your eVA username and password to login and click Buyer Login button.
Step 2	Click down arrow next to words 'Go To'	Click on eMall/ eForms. 
Step 3	Click Requisition	Located in the top, right menu of the eMall Home Page. 
CREATE REQUISITION HEADER		
Step 4	Enter a Request Title	Title the requisition to allow easy searching for you and others in your agency. (The Title does not display on the order.)
Step 5	<i>(optional)</i> Select On Behalf Of	If buying on behalf of another, click the down arrow in this field and search for that person. The requisition will follow that individual's approval workflow and also use their pcard, if applicable.
Step 6	<i>(optional)</i> Check Use PCard	This field is checked by default and will not appear until you have set up your SPCC in the appropriate Preferences menu. Uncheck this box if the vendor does not accept pcards or you wish the entity to be billed. NOTE: Keep your card updated (Exp. date) to avoid the pcard fields from dropping off the requisition.
Step 7	Verify Agency/Entity	Your agency name will be prefilled.

Step 8	Verify Fiscal Year	Ensure correct Fiscal Year displays. Fiscal year begins July 1 and ends June 30.
Step 9	Enter a PO Category	<p>“R01” - most common, which means routine order.</p> <p>“V” - orders for technology that must be approved by VITA (Virginia Information Technology Agency).</p> <p>“X02” - purchases not subject to eVA fees; must be preapproved.</p>
Step 10	Enter Procurement Transaction Type	Select the code that accurately describes your type of purchase. When multiple Procurement Transaction Types are entered on the same requisition, choose the type that is the highest dollar value.
Step 11	Check Confirming Order; Do Not Duplicate (<i>optional</i>)	<p>If the order is a confirming order, check the checkbox.</p> <p>NOTE: An automatic message will be inserted in the Comments section warning the vendor not to duplicate.</p>

ADD A NON-CATALOG LINE ITEM

Use when there are no catalog choices for your item(s). *Never add Personally Identifiable Information (TaxID or SSN in description fields.)

<p>Step 12A-1</p>	<p>Click Create Non-Catalog button</p>	<p>Located at top right of screen.</p> 
<p>Step 12A-2</p>	<p>Enter information <u>for required fields</u>.</p> <p>(NOTE: Most recent selections appear in drop down menus.)</p> <p>Fill in <u>optional fields</u> as needed.</p>	<ul style="list-style-type: none"> * Full Description * Supplier * Unit of Measure * Unit Price * Contract # <i>(see below note)</i> * NIGP Commodity Code * Supplier Location (if blank) * Quantity * Receiving Method (Quantity can be changed to Amount) <p><u>If chosen vendor has a contract</u>, choose the applicable contract from the Contract List dropdown. If contract doesn't appear but item is on contract, chose 'Item on contract but not in list' and enter the contract # in the contract field.</p> <p>If Receiving method field does not appear, it signifies agency has not authorized receiving by 'Amount'.</p> <p>If purchase is to be worked later by a Procurement Professional, the chosen supplier can be "Vendor to be Determined".</p>



PR7381372: Paper Shredder Items: 0 Total: \$0.00000 USD

If you cannot locate the item you want in the catalog, request a non-catalog item using the fields below. Non-catalog items may take longer to process because your purchasing department may ...

Full Description: * Paper Shredder

NIGP Commodity Code: (none selected)

Supplier: 00500 - ABRASIVES

Location: 07300 - TRAILERS

Reg. Type: 07100 - AUTOMOBILES, SCHOOL BUSES, SUVS, AND VA... 28590 - Voltage Line Thermostats, Inverters, Co...

Supplier Part Number: Search for more...

Contract List: (Pick from List) v

Contract #:

Supplier Auxiliary Part ID:

Quantity: 1

Unit of Measure: each v

Price: * \$0.00000 USD

Amount: \$0.00000 USD

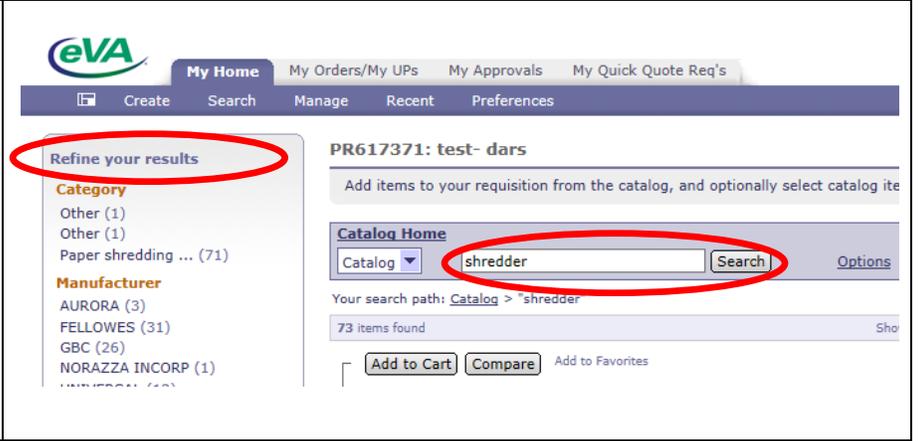
Receiving Method: Quantity v

Step 12A-3	Click OK	The first item is saved and the screen refreshes so you can enter your next item. Repeat step <u>13</u> OR copy the line item and edit necessary fields until all desired non-catalog items appear.
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ADD A CATALOG LINE ITEM

The catalog screen allows you to search for items. Only items from vendors who have provided a catalog will appear. Use the **Search Description** field to find your items. To refine the search further, choose additional filters appear showing on the left menu. If you see the ‘Buy from Supplier’ button, refer to next section ‘Adding Items from a PunchOut Catalog’.

Step 12B-1
Enter **Search Description** and click **Search**. Drill down further using **Refine your results** in the side navigation bar.



Step 12B-2
Enter appropriate quantity and then click **Add to Cart** button.

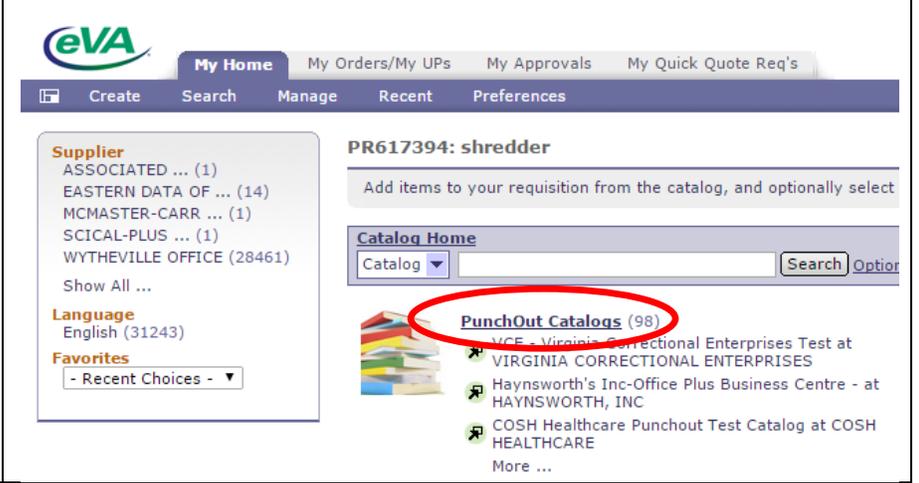


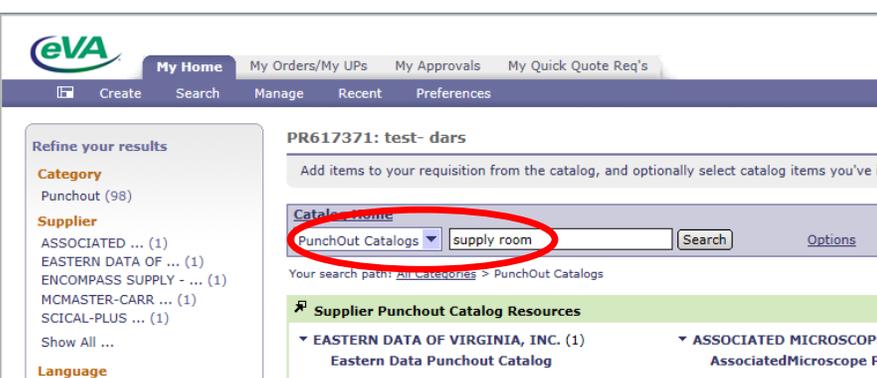
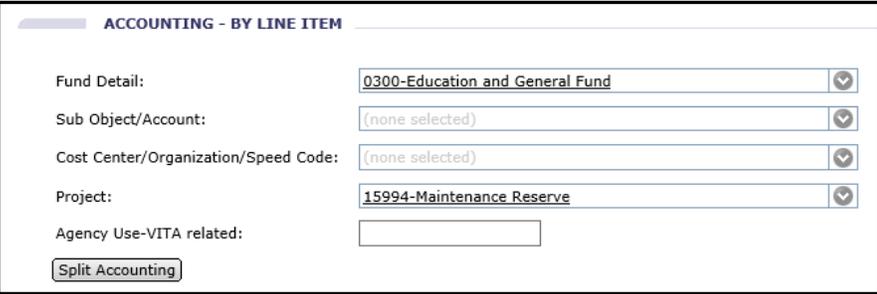
The item is saved and the screen refreshes so you can enter your next item.

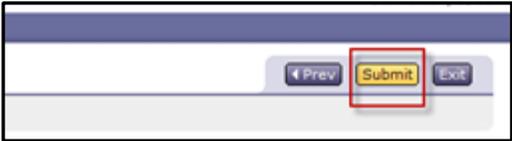
ADD A PUNCHOUT CATALOG LINE ITEM

When a catalog item shows a ‘Buy from Supplier’ button, it means the vendor has connected their website to the eVA website, so you are ‘punching out’ to that site; thus the term ‘Punchout’ catalog. If you know your vendor has a punchout catalog, do NOT conduct a search for your item inside eVA. Go directly to the PUNCHOUT category and click on the link.

Step 12C-1
Click **PunchOut Catalogs**



<p>Step 12C-2</p>	<p>Enter the vendor's name in Search Description and click Search</p>	
<p>Step 12C-3</p>	<p>Select the name <u>below the main supplier heading</u>.</p>	 <p>You will be taken to the vendor's website.</p>
<p>Step 12C-4</p>	<p>Shop for your items</p>	<p>Items selected from Punchout Catalogs will carry over to the eVA Requisition. State contract pricing, if applicable, is provided to give you best pricing. Each Punchout Catalog is unique and designed in accordance with the vendor's business needs. Although business websites have similar functions, there are no specific standards or rules that govern how the supplier must design their site.</p>
<p>Step 12C-5</p>	<p>Click appropriate button to return to eVA requisition (e.g. 'Order' or 'Checkout')</p>	<p><i>The vendor will not fulfill order until receiving actual eVA order.</i></p>
<p>Repeat Step 12 until all desired items are entered.</p>		
<p>ADD ACCOUNTING INFORMATION</p>		
<p>Step 13</p>	<p>Select checkbox next to items that require Accounting data.</p>	<p>Click the EDIT button below all line items.</p>
<p>Step 14</p>	<p>Scroll to the bottom of the screen to Accounting Section.</p> <p>IMPORTANT: <i>IF the same code must be applied to multiple lines*, you may not choose to split the accounting for various codes.</i> <i>*This is called Mass Editing.</i></p>	<p>Fields open to allow entry of accounting codes by line items. Type values or click the down arrow and chose the 'Search for more...' option. If necessary, search for desired code.</p> 
<p>Step 15</p>	<p>When accounting has been updated, click the OK button.</p>	

Step 16	If multiple lines were edited, click Done to confirm changes or Cancel to remove changes. <i>(optional)</i>	The modified fields will be identified by hyperlinks.
CHECKOUT REVIEW		
Step 17	Review Requisition	Review the Requisition. If any changes need to be made, click the Previous button to navigate to the section that needs to be updated. <ul style="list-style-type: none"> - Did you use correct accounting information? - Have you included the contract number, if applicable? - Have you placed a notation in the comments section if you were not able to find a vendor that meets the set-aside requirements? - Is a confirming order noted by checking Confirming order checkbox? - Do you need to add any approvers (refer to Approval Tab)
Step 18	Add Shipping Information	If multiple shipping addresses have been added to eVA for your organization, you can select an address other than your standard default shipping address by clicking the ‘Search for more.
Step 19	Add Comments/Attachments	Comments and Attachments are INDEPENDENT of each other. Comments and Attachments can also be included for individual line items. To include attachments (files) on order(s), click the ADD ATTACHMENT button and select your file(s). “Visible to Supplier” checkbox allows the vendor to see your comments and/or your attachments. NOTE: Even after a requisition has been submitted, additional comments and attachments can be added. “Mark attachment(s) as Proprietary and Confidential” checkbox does NOT allow the vendor to see your comments and/or attachments. Use this checkbox if you are adding sensitive information such as Tax Id or an SSN in the Comments Section .
SUBMIT		
Step 20	Click Submit	Located in the top right corner. 

For more help: Call toll free 866-289-7367 or Email eVACustomerCare@dgs.virginia.gov

APPENDIX A - PROCUREMENT TRANSACTION TYPES (FULL DESCRIPTION)

The intent of the code is to allow state reporting of goods and services at a Purchase Order level.

- **10 - Equipment** - Non-Technology- Procurements not meeting the technology equipment description and are not used except through depreciation or wear and tear. Items would typically include: furniture, vehicles, machinery and other similar types of large objects. Agencies should use the 50% rule in determining whether procurements of equipment including labor for installation or servicing would be categorized as equipment or service.

50% rule: The deciding factor is where the majority of the cost is expended – on the product itself or on the services related to making the product functional. Whenever the estimated cost of materials, equipment, or supplies amounts to 50% or more, it is not considered a service.

- **15 - Equipment** – Technology- Procurements of technology equipment that are not used up except through depreciation or wear and tear. Items would typically include: computers, peripherals, etc. (Consult your IT department if you need more information).
- **20 - Supplies** – Non-Technology- Procurements not meeting the technology supplies description that would include all types of consumables such as: food, clothing, fuel, medical supplies, athletic supplies, office supplies, replacement parts, hardware supplies, printer supplies, etc.
- **25 - Supplies** – Technology- Procurements of technology supplies that would typically include: software, replacement parts, consumables, etc. (Consult your IT department if you need more information).
- **30 - Non-Professional Services** – Non-Technology- Procurements of activities performed by independent contractors not found under the description for technology or professional services that do not consist primarily of the acquisition of equipment or materials, or the rental of equipment, materials and supplies. Items would typically include: maintenance agreements, custodial services, grounds maintenance, banking/collection services, advertising/public relations, security services, food service, vending, hauling/moving/transportation, conference facilities, insurance, and rental of equipment with operators. Agencies should use the 50% to determine the type of procurement (service or equipment).
- **35 - Non-Professional Services – Technology**- Procurements of activities performed by independent contractors not found under the description for non-technology or professional services that do not consist primarily of the acquisition of equipment or materials, or the rental of equipment, materials and supplies. Items would typically include: maintenance agreements, consulting services, trainers, etc.
- **40 - Professional Services** – As defined by the *VPPA* means work performed by an independent contractor within the scope of the practices of: accounting, actuarial services, architecture, land surveying, landscape architecture, law, dentistry, medicine, optometry, pharmacy, professional engineering and the services of an economist procured by the State Corporation Commission. These are the only services that use the transaction type of Professional Service.
- **45 - Printing** – Procurements of printing services and products.
- **50 - Construction** – Procurements of buildings, altering, repairing, improving or demolishing any structure or building. Draining, dredging, excavation, grading or similar work upon real property. Typically might include: door repair or replacement, roof replacement, renovations of any kind, mine reclamation, site grading, etc.
- **55 - Highway Construction** – Procurements of highway construction, services, maintenance and repair.
- **60 - Real Property** – Procurements of the lease of office space, purchase/sale of land, appraisals/broker services, etc.
- **65 - Surplus** – Procurements of surplus property.
- **70 - PPEA/PPTA** – Procurements using the Public-Private Educational Facilities Infrastructure Act or Public-Private Transportation Act
- **75 - ARRA** – Procurements utilizing the American Recovery and Reinvestment Act.
- **80 – Cooperative Procurement**
- **85 – Non-Procurement or Other**
- **90 - Grant Opportunity**