All agencies of the Commonwealth of Virginia are required to award contracts to only those vendors registered in eVA, the Commonwealth’s internet-based procurement system.

The eVA marketplace is used by more than 245 state agencies and institutes of higher education and 900+ local governments and public bodies to announce bidding opportunities, contract management and more.

eVA is the Commonwealth Procurement Tool
- Implementation of a New eVA launched November 1, 2022.

University purchasing personnel designated as eVA users may access the system at the eVA website.

All procurement transactions over $5,000 must be entered into eVA.
New eVA has improved transparency of Government Purchasing.
eVA – Virginia’s Marketplace is now …

- Easier
- More Streamlined
- More Intuitive
New eVA User Guide

This manual will serve as a step-by-step instructional guide on how to place an order through the Commonwealth of Virginia’s internet-based marketplace, eVA.

You will learn how to submit a requisition and view purchase orders.
# New eVA User Guide

## Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>New eVA Conversion</td>
<td>6</td>
</tr>
<tr>
<td>Log In Instructions</td>
<td>8</td>
</tr>
<tr>
<td>New eVA Homepage</td>
<td>10</td>
</tr>
<tr>
<td>Creating a Purchase Requisition</td>
<td>11</td>
</tr>
<tr>
<td>Adding a Line Item</td>
<td>13</td>
</tr>
<tr>
<td>Adding a Supplier</td>
<td>17</td>
</tr>
<tr>
<td>Ordering from a Contract</td>
<td>18</td>
</tr>
<tr>
<td>Allocations</td>
<td>19</td>
</tr>
<tr>
<td>Adding Attachments</td>
<td>20</td>
</tr>
<tr>
<td>Checking Approval Flow</td>
<td>27</td>
</tr>
<tr>
<td>Creating a Change Order</td>
<td>29</td>
</tr>
<tr>
<td>Reviewing &amp; Approving Requisitions</td>
<td>32</td>
</tr>
<tr>
<td>Resources</td>
<td>37</td>
</tr>
<tr>
<td>PO Category Guidelines</td>
<td>38</td>
</tr>
<tr>
<td>eVA Procurement Types</td>
<td>42</td>
</tr>
</tbody>
</table>
What Changed?
• EP ➔ PO
• PR ➔ REQ
• Vendors ➔ Suppliers
• Comment field available
• Attachments can be added at line or Header level (Header level preferred)
• Warning messages as you enter information
• Cannot enter multiple budget codes on one line item
• Orders in Banner will now start with an “M” followed by the last 7 numbers of the eVA PO number

What did not change?
• Must enter all expenditures over $5,000 into eVA
• Must utilize contract and SWaM suppliers as available
• PO must be completed prior to order being placed
• eReceiving done in Banner (3 days)
• All other purchasing expenditure approval and limit requirements.
What data converted?
• Approved Requisitions
• Purchase Order

What did NOT convert?
• Any transactions left in draft or submitted status
• Workflow history for converted transactions

What is the timeline?
• Two calendar years of transactions were converted

• Transactions that were not converted are available via reporting
1. Go to http://www.eva.virginia.gov/
2. Click Buyer Login.
3. Enter your eVA User ID, Password and click login OR Click on the green Log In button to login with your Midas ID.
4. Select ODU.
5. You are then taken to the ODU network login page.
6. Enter your Midas ID and Password.
You are taken to eVA’s homepage.

To return to this page from any place in eVA click the logo in the top left corner.

The “My to-do list” section will show any requisitions on which you need to take action.

The “What’s my order status?” section will show you at a glance where in the process your requisitions are.
To create a Purchase Requisition (REQ), select Procurement, then Create Requisition.

The requisition Title should be in the following format: Vendor Name, brief description, budget code, sub account code. (If this is a pre-payment or ETF order then that should be noted before the vendor.) Entering more than 128 characters in this field will result in an error in the Banner import.

Organization: Be sure it defaults to your dept
Type: select Purchase
PO Category: select the appropriate PO Category from the list
Procurement Transaction Type: select the appropriate PO Category from the list

Click Save

Fields with a * are mandatory.
After completing the required fields, select “Save”.

After Saving, Ship To and Bill To will appear.

**Ship To**: Be sure this defaults to your Ship To address.

**Bill To**: Be sure this defaults to Accounts Payable address.

Scroll down, click **Add line**
**Item Detail** screen will appear after selecting **Add Line.**

Enter required fields.
- **Product Type** *
- **Detailed Description** *
- **Order Qty** *
- **Commodity** *
- **Unit Price** *
Adding Shipping/Freight Line item NIGP Commodity Code 96286

Shipping
If shipping is charged, it must be entered on a separate line item. The appropriate commodity code must be used, #96286

Shipping/Freight charges must be added on a separate line item.

Please note: Shipping/Freight are Exempt from eVA Transaction Fees.
Purchase Order descriptions of goods and services include characteristics of the goods and/or what the vendor shall provide based on performance.

**GOODS**

1 each
Table, wood, 30x60, with center draw, with modesty panel, Hon Model #3060-cd, assembled, packaged and shrink wrapped with water-proof material

1 box
Fasteners, square bead bolts, type 5, stainless steel, 24 per box

**SERVICES**

12 month
Material, labor, equipment and supplies to mow specified grass areas to a height of 2”, rake and remove all refuse from the premise. All work shall be performed before 8:00 am or after 4:00 pm Monday - Sunday
ETF Purchase Orders

ETF Process Guidelines

Title of PR
ETF, Vendor Name, Order Description, Budget Code/Sub-Account Code

Line-Item Description
If there are several components to the system enter them all in one line item, unless otherwise specified in the ETF Process Guidelines

Be sure the ETF Authorization Number is referenced in the line-item description

Freight/Shipping
Must be on a separate line-item with use of the appropriate commodity code #96286

Ship To Address
All ETF items except for equipment that requires installation and/or calibration, must be shipped to ‘ODU Property Control’

Delivery To Address
Final delivery location should be in the comments section of the PR

Accounting Information
Enter the correct budget and sub-account codes for all ETF items and all items over $5,000 (Must be tagged as a Fixed Asset)
Scroll down to enter Supplier.

Next, add Supplier using their TIN and Save

(Verify Ship to information is correct)

Note: It is important to enter a Supplier by TIN to ensure you use the right Supplier.

Fields with a * are mandatory.

Note: All Non-catalog requisitions will receive the below notification:
To Order from a Contract

Scroll down, to Internal Additional Details section

Put Contract # in External Contract Field

and SAVE
Scroll down to add **Allocations**

**%:** Be sure defaults to 100%

**Fiscal Year:** Be sure defaults to current FY

**Accounting Cross Reference:** Not Required

**Agency Use Only = Budget Code**

**Account =** Sub-account code

Once complete, select **Save.** Review for accuracy. If correct, select **Save & Close.**
After Saving, **Header** screen will appear. To add an Attachment to a line item:

To add an **Attachment**, scroll down to **Items & Services**.

Click **Pencil** icon.

Scroll down to **Attachments**.
After Saving, **Header** screen will appear. To add an Attachment to Requisition **Header**:

To add an Attachment to the entire Requisition

Scroll down to bottom of page
Adding an Attachment:

Click + New Document
Adding an Attachment:

Select **Supplier Document**
Adding an Attachment:

Entire Title in **Documentation** field.

Under the **Information** section, click the paperclip icon labeled **Click or Drag to add files**.

Attach file.

Select **Save & Close**.
After Saving Attachment, you’ll return to the **Header** page.

Scroll through Requisition to ensure all fields needed are complete, correct allocation, attachment was saved.
Save and Close; Submit for Approval

Note: If at any point you have to cancel your PO once it is issued, please put the date and reason in the comment field.
To Check the Approval flow
Select the check mark icon
Then scroll down to bottom of page
Sample Approval flow

Approval History

Previous Approvals & Refusal

Mail History

<table>
<thead>
<tr>
<th>Date [UTC-4]</th>
<th>Send to</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/4/2022 9:59:37 PM</td>
<td>&quot;EDWARDS Barbie&quot; <a href="mailto:bbedwards@odu.edu">bbedwards@odu.edu</a></td>
</tr>
<tr>
<td>4/4/2022 9:59:37 PM</td>
<td>&quot;WILLIAMS Jeraldine&quot; <a href="mailto:jwillys@odu.edu">jwillys@odu.edu</a></td>
</tr>
</tbody>
</table>

eVA Purchase Request / Your action is expected for: eVA Approvals

<table>
<thead>
<tr>
<th>Date [UTC-4]</th>
<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/4/2022 9:59:37 PM</td>
<td>eVA Purchase Request / Your action is expected for: eVA Approvals</td>
</tr>
<tr>
<td>4/4/2022 9:59:37 PM</td>
<td>eVA Purchase Request / Your action is expected for: eVA Approvals</td>
</tr>
</tbody>
</table>
Change Order Modifications

Change Orders are modifications to the Terms and Conditions of a Contract

Original Requestor → Contract ← Vendor

The original requestor can create a Change Order.

Change Orders should only be done for change in Cost and or Quantity.

Never delete a line item. You should zero out the dollar amount.

Invoice tolerance is 100%, not to exceed $100 per line item.

Comments should be added clarifying why the REQ is cancelled.

Change Orders cannot be made to Purchase Orders issued in Legacy eVA prior to Nov. 1, 2022. Please contact evaadmin@odu.edu for assistance.
Creating a Change Order

- Browse Orders
- Use the Keyword search to search by supplier, your name, etc.
- Select the PO to change
- Select Change Order button at the top of page
Creating a Change Order

- Select the edit button next to the line item you need to change
- Change the quantity or price for the item
- Save and close the item screen
- Submit the change order

Reminder: Change orders may only be done for price or quantity changes no other reason.
Select the eVA logo to return to the Home page (Welcome to eVA)
To Approve eVA Orders

Select REQ in the My to-do list section
To Approve eVA Orders

To view Allocations …

1. Scroll down to Items & Services, then Select the pencil icon
To Approve eVA Orders

1. After verifying the correct allocation, select Save & Close
To Approve eVA Orders

Choose Approve if everything is correct or Reject to send back to the user. If you reject the requisition, provide a reason in the box which will appear.
Important Approver Notes

• Please note that approvers, including Procurement Services buyers, cannot make edits to submitted requisitions. Orders needing changes must be rejected and edits made by the initiator of the requisition.

• If you will be unavailable for a time, please delegate your authority to another approver before you leave the office. Access to your account itself cannot be given to another user as this is a violation of your Acceptable Use Agreement.
eVA PO Category and Exceptions and Exemptions Guidelines

All eVA Purchase Orders require the entry of a purchase order (PO) category. Purchase order categories are entered on the ‘Add Title’ screen of the eVA purchase requisition in the PO Category field. PO Categories are based on vendor registration type and/or the eVA exempt category listing. A guide to the appropriate use of PO Categories is listed below.

R01 - Routine: Should be used for all routine purchases with the exception of the exempt categories orders (see Exempt Category List below).
S01 - Sole Source: Should only be used for sole source purchases greater than $10,000.
E01 - Emergency: Should only be used for emergency purchases.
X02 - Exclusion Exempt: Should be used for purchases for one of the eVA exempt categories listed below.

Exempt Category List
The following may be processed by issuing an eVA purchase order with an X02 PO Category:
1. Purchases made using the DPS statewide contract for Express Delivery Services.  
   Example: United Parcel Services - contract #91026
2. Purchases made by a university employee or agent while located in another country and the required goods/services are purchased from a vendor located in that country and the purchased goods/services will be used in the country where they are purchased.
3. Advertisements such as newspapers, magazines, journals, radio, television, etc.
4. Professional organizational membership dues and training classes sponsored by the professional organizations when payment is made directly to the professional organization sponsoring the training classes. (Vice President approval is required for processing organizational membership dues. This is a paper process with manual routing required.)
5. Conference registrations
6. Accreditation fees and academic testing services
7. Individual or group travel and lodging. (PCard cannot be used. Group travel over $50,000 should be entered as R01. This includes Enterprise Rental.)
8. Surplus property
9. Exhibition rental fees for exhibitions of historical artifacts or original works of art. (The rental fee may include charges other than the rental of the exhibition, such as transportation costs.)

10. Goods or personal services for direct use by the recipients of programs specified in the Code of Virginia §2.2-4345, if the procurement is made for an individual recipient. Contracts and/or spot purchases for the bulk procurement of goods or services for the use of recipients shall not be exempted.

11. Medical (Health Care) Services when the service is provided by a hospital or an individual licensed and authorized by law to engage in the prevention, diagnosis, or treatment of human illness, injury, or physical disability, mental health, mental retardation, substance abuse, or emotional condition. Contracts and purchase orders between the agency or institution and temporary service providers or independent laboratory testing companies are not exempt from purchasing through eVA.

12. Purchases made using the DPS authorized multi-state drug contract

13. Revenue contracts, e.g., scrap, recycling or contracts with $0 payment made by the Commonwealth such as contracted out bookstore services, Food service operations.
   Examples:
   - Aramark - FIN 231354443 for on campus dining and catering
   - Aramark - FIN 231664232 for food service operations for the Ted Constant Convocation Center
   - Follett Higher Education Group
   - Under Armour- FIN 521990078

14. Government-to-government purchases; other than purchases from mandatory sources (VCE is not considered exempt. VCE should be entered as R01.)

15. Individuals providing instructional services in conjunction with a contract between an institution of higher education, including community colleges, and a local business or industry for non-credit workforce development classes to be provided by the institution of higher education.

16. Purchases made via closed loop systems or automated inventory control systems for items for resale (Drugs only POs)

17. Intercollegiate athletic event entrance and related fees (e.g., tournament entrance fees)
The following may be processed in eVA:
1. Honoraria
2. Entertainment - speakers, lecturers, musicians, performing artists
3. Intercollegiate athletic game referees, officials, and umpires, etc.

Notes:
   a. If vendor is an Individual, the Independent Personal Services Certification (IPSC) form and associated process must be followed.
   b. If vendor is a Company, the use of the Standard Engagement Agreement (SEA) will support scope of services and payment authorization request.

The following may be exempt from processing in eVA and should be processed via a Payment Document/Memo Only:
1. Real estate leases
2. Purchases from public auctions (non-electronic)
3. Contracts with commercial fisherman for replenishment, research and stock assessment activities
4. Financing when goods/services procured from one source are being financed by another (i.e., third party) source. The financing exclusion does not apply to lease purchases.
5. Business and/or financial transactions to which public procurement regulations do not apply. Examples include debt service payments, Medicare and Medicaid payments, and child support payments.
6. Award of grants by agencies and institutions to public bodies or tax exempt non-profit charitable organizations. This exception does not apply to the expenditure of grant funds by agencies and institutions for the purchase of goods and/or services (see APSPM 13.8e).
7. Public utilities (electric, natural gas, water, sewer)
8. Local funds owned by trust-agent organizations (e.g., student organizations). These funds are non-state and are not owned and controlled by the university. The university’s sole responsibility is writing checks out of a local account maintained on behalf of the organization that owns the funds. This exclusion does not include Auxiliary Enterprises.
Addendum B: eVA Procurement Types

The following Procurement Types are for use on the ‘Title Screen’ of ALL requisitions and will be a required field. The Procurement Transaction Type should be selected to best fit the overall purchase on your requisition. There will be situations where requisitions include a mix of products and services, in these cases we need to determine the ‘over all’ purchase or use the 50% Rule.

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.

10: Equipment - Non-Technology: Procurements not meeting the technology equipment description that are not used up 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.

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.

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.

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:** procurements associated with a cooperative.

85: **Non-Procurement or Other:** an expense or other non-procurement type transaction.

90: **Grant Opportunity:** a Procurement associated with a grant.