eVA Quick Reference – Create a Requisition

Step-by-Step

1. Go to: [http://eva.virginia.gov](http://eva.virginia.gov). (For system access complete the eVA Login Request form)
2. Click on Buyer Login, select “Login” under the heading Log in with your Agency Account
3. Select, George Mason University then enter your Mason Net ID and Patriot Web password
4. Select eMall/eForms in the “Go To” menu
5. On the left under “Create” select Requisition”

6. In the “Title” field enter a name for the purchase (e.g., vendor, date, org/fund)
7. Check or uncheck the “Use PCard” box based on the type of requisition and vendor preferences (To add or manage P-Cards in eVA use the Manage PCard Guide)
8. The “on Behalf of,” “Agency code,” and “Fiscal Year,” fields should populate automatically
9. In “PO Category” field, select “R01” (or “X02” for specific categories below)
10. Select a Procurement Transaction Type from the drop down.
11. Do not enter a “GMU Requisition Number”.
12. If you are processing a Confirming Order then check the box next to “Confirming Order; Do not Duplicate” and “Bypass ERP Integration.”
13. Select the option that corresponds to the order type.
   a. **Non-Catalog Order to an eVA Registered Vendor**: An order to an eVA registered vendor that does not have a PunchOut Catalog in eVA.
   b. **PunchOut Catalog Order**: An order to an eVA registered vendor that has a PunchOut Catalog
   c. **Confirming Order**: An order completed through a Vendor’s website or over-the-phone that was not initiated in eVA prior to the purchase. A Confirming Order simply records the purchase in eVA and is required to maintain compliance.
   d. **Order to an Unregistered Vendor**: An order must be placed to an eVA registered vendor. This link provides information on eVA vendor registration. Users should complete a Vendor Search prior to initiating the order.
14. Complete the steps for the appropriate order type listed above.

**PO Categories**

- **Use the R01 category for most routine purchases.**
- **Use the X02 Category for purchases exempt from eVA fees:**

<table>
<thead>
<tr>
<th>Category</th>
<th>Common Commodity (NIGP) Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic testing services</td>
<td>92420: Examination and Testing</td>
</tr>
<tr>
<td>Accreditation fees</td>
<td>96316: Accreditation Fees</td>
</tr>
<tr>
<td>Advertisements (newspapers, magazines, journals, radio, television)</td>
<td>91571: Print</td>
</tr>
<tr>
<td></td>
<td>91574: Radio</td>
</tr>
<tr>
<td></td>
<td>91578: Television</td>
</tr>
<tr>
<td>Entertainment (speakers, lecturers, musicians, performing artists)</td>
<td>96205: Live Performances</td>
</tr>
<tr>
<td>Exhibition rental fees</td>
<td>97105: Booths, Conference/Exhibit, Rental</td>
</tr>
<tr>
<td>Government to government purchases (except mandatory sources such as VCE)</td>
<td>Varies with type of purchase</td>
</tr>
<tr>
<td>Honoraria</td>
<td>96322: Subcontracted Services Allowance</td>
</tr>
<tr>
<td>Professional organization membership dues</td>
<td>96348: Membership Dues</td>
</tr>
</tbody>
</table>

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Procurement Transaction Type
Check the eVA Procurement Transaction Types for a complete list and descriptions.

Approve and/or Print the Requisition (PR#)
1. Users will receive an email notification if an order requires approval. For orders billed directly to Accounts Payable (non P-Card orders) a department approver will be notified and must approve the requisition before a Purchase Order can be issued. (See eVA Approvers Guide for further instruction.)
2. For orders paid with a P-Card (through eVA or as a Confirming Order) the P-Cardholder will approve the transaction in eVA using the steps below:
   a. Select the Purchase Requisition (PR#) or the word “Approve” under the “To Do” section of the eVA Dashboard
   b. On the “Approval Summary” page click the Approve button on the then click OK.

3. If the vendor accepts electronic orders, the order is sent electronically from eVA to the vendor.
4. If the vendor does not accept electronic orders, the user must print and send the order, after approval, to the vendor using the steps below:
   a. Select the PR# under the “My Documents” section of the eVA Dashboard
   b. Click the EP# or PCO# hyperlink located under “Line Items” to open the completed Purchase Order and print/send a copy to the vendor.

Complete the Bank of America Works Process (for purchased made with a Mason P-Card)
1. P-Cardholders will receive an email from Bank of America Works when transactions appear in Bank of America Works. P-Cardholders should be aware of ALL P-Card allocation and sign off deadlines and complete the process in a timely manner.
2. Login to Bank of America Works at https://payment2.works.com/works/sc/ScnZXq
3. Locate the transaction, complete the allocation and sign off. The PCO# or EP# from the eVA order must be entered into the “eVA Order number or Exempt” GL04 field in the Bank of America Works allocation. Complete allocation instructions are available on the Quick Reference Guide for Cardholders.

Complete the Receiving Process (for non P-Card purchases billed to Accounts Payable under $5,000)
1. Select the PR# under the “My Documents” section of the eVA Dashboard, then click the Receive button
2. Click the Accept All button if all items have been received, otherwise select which items to receive
3. Click “Yes” under Close Order if all items have been received, otherwise select “No” then submit.

For assistance with eVA please contact the eVA Administrator at evaadmin@gmu.edu or Ext. 3-2580. Additional quick guides and references for eVA may be found online at https://fiscal.gmu.edu/training/obtain-training-materials/.