Notes on New eVA – Transition Document

With the transition to the new eVA platform complete, we have highlighted some of the changes you may encounter between old and new eVA. Remember, the entire platform was updated and the user interface is brand new. For details on how to navigate in new eVA, add a P-Card, and process Requisitions please refer to the Use eVA Manual.

User Name & Password

Your username and password will stay the same. Remember to use the “Login with Agency Account” option and select GMU, then enter your Net ID and Patriot password.

Please note that first time users will be prompted to electronically sign the eVA Acceptable Use Acknowledgement.

Please review the document in full and then complete the acknowledgment to continue.

Terminology (Old vs. New)

<table>
<thead>
<tr>
<th>Old Terms</th>
<th>New Terms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Requisitions (PR)</td>
<td>Purchase Requisition (REQ)</td>
</tr>
<tr>
<td>Purchase Order (EP)</td>
<td>Purchase Order (PO)</td>
</tr>
<tr>
<td>Purchase Card Order (PCO)</td>
<td>Purchase Card Order (PCO)</td>
</tr>
<tr>
<td>NIGP Commodity Code</td>
<td>Commodity Code</td>
</tr>
<tr>
<td>Receive an order/Receiving Report</td>
<td>Create Receipt (REC)</td>
</tr>
<tr>
<td>Procurement Transaction type: numbers with descriptions (for example: 20 – Supplies non-technology)</td>
<td>Procurement Transaction Type: descriptions only (for example: Supplies Non-Technology)</td>
</tr>
<tr>
<td>Comments: can be marked “visible to supplier”</td>
<td>Separate sections for Comments (to supplier) and Internal Comments (for Mason only)</td>
</tr>
<tr>
<td>Attachments: can be marked “visible to supplier”</td>
<td>Attachments: can be marked “Internal Attachment” or “Supplier Document”</td>
</tr>
</tbody>
</table>

Vendor Search

General Notes

- Never attempt to “Create a Supplier” on your own within eVA. This must be completed centrally by Fiscal Services. Instructions for new vendors is available on the Do Business with Mason webpage.
- Only use a vendor that is listed as “Active,” otherwise your order may fail.
- Be sure the vendor has a Mason G# by conducting a G# lookup, otherwise your order may fail.
- Currently the Vendor ID listed on the eVA webpage (prior to login) is different than the Code displayed in the new eVA interface. This should not cause any integration issues.

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• When searching for a vendor on the eVA webpage (prior to login) the Vendor information may display like this. You can click on the Vendor ID for contact information and additional details.

• In the New eVA platform interface, the Browse Suppliers list (Suppliers>Browse Suppliers) may display like this. You can click on the Supplier name for contact information and additional details.

Clicking on the Vendor name will open the Vendor Profile. Additional details about the vendor such as their acceptance of Charge Cards and Account Type, are available by viewing the different sections of the vendor profile on the left side menu.
Converted Order Search
Requisition and Purchase Order numbers that were converted from old eVA will not update in Banner. The old eVA EP# will still be listed in Banner and you do not need to take any action.

**To search for Requisitions** that were converted: Go to the **Procurement** tab and select **Browse Requisitions**. Enter the PR# into the “Reference Number” field. The “Keyword” field may not provide results.

Click on “My Requests” and leave the search fields blank to see Requisitions that you have submitted.

**To search for Purchase Orders** that were converted: Go to the **Procurement** tab and select **Browse Orders**. Enter the EP# into the “Reference Number” field. The “Keyword” field may not provide results.

Click on “My Requests” and leave the search fields blank to see Orders that you have submitted.

Click on the Purchase Order or Requisition # to view the document. To print a copy, go to **Other Actions** and select how you would like it printed. To create a Receipt (previously called Receiving) click on **Create Receipt**.

We strongly discourage users from creating a “Change Order” on orders that were converted from old eVA to new eVA as changes to converted orders will not integrate with Banner. We recommend creating a new order when a change to a converted order is required. Email **enclose@gmu.edu**, with the old eVA EP# to request to close the Banner encumbrance.

*If absolutely necessary, select the Change Order button, complete the updates, and check the “Bypass Integration” option. Then email the Purchasing Office at **purch1@gmu.edu** with the details of the change order including the EP# and new amount so that a Buyer can manually update Banner.*
Allocations

To add an Allocation to the entire purchase order, select all items and then click “Set Allocation.”

Enter “100” in the % field, select “2023” as the Fiscal Year, select the Fund or Org, and Account code. Then click Apply and Close. The allocation will be recorded for all lines. To split the allocation, click the +Allocation button and repeat the steps.

To add an Allocation to each line item, click the pencil icon next to the item to open the Item Details. Scroll down to the Allocation section. Select “2023” as the Fiscal Year, select the Fund or Org, and Account code. To split the allocation, click the +Allocation button and repeat the steps. Then click Save and Close.

Changes to Punchout Catalogs in the New Platform

**General Functionality:** If a user is viewing items in the supplier’s punchout catalog site and does not need to send items back to a Requisition, they can return to the Requisition or Search Products page by clicking back on their browser.

**Change Orders:** Change orders for punchout catalog items will take place on the Order. This would include changing quantity (increase or decrease) and/or deleting items. Users will NOT return to the punchout to update an order.

We encourage you to review the New eVA Interface video, quick guides, and manuals that are available on the Use eVA Purchasing webpage to help you navigate the new platform. This information was specifically designed to help you transition successfully.

If you continue to need assistance, after reviewing all available training information, please sign up for a New eVA Walk-in by visiting the Calendar.

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