eVA Basics Manual

Prepared by Fiscal Learning & Engagement
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Purchasing Policy Overview
All faculty and staff must remain responsible stewards of state and university assets by complying with the established policies and procedures outlined in University Policy 2106 – Purchasing Goods and Services. This includes to:

- Obtain high quality goods and services at a reasonable cost
- Seek competition to the maximum extent possible
- Provide all qualified vendors access to public business
- Conduct procurement procedures in a fair and impartial manner
- Encourage participation of small, women, and minority owned businesses
- Utilize existing institution-wide contracts, where available

Purchases of $5,000 or less are delegated to employees at the Unit level. The Mason Contract Addendum should be attached to contracts to override unallowable vendor terms and mandatory sources must be used. Employees should use a P-Card whenever possible.

Purchases over $5,000 up to $200,000 must be entered into eVA by the Unit and approved by a Purchasing Office Buyer. Purchasing authority at this level requires a letter of Delegation of Signature Authority before making any contractual commitments. Purchase requests must include at least three vendor quotes, two of which must be Micro/SWaM (when available), unless an existing contract is used. The process requires a 5 –10-day lead time. The $5,000 threshold applies to the total cost of the purchase, regardless of the number of payments made to the vendor or service provider.

No Split Orders
Any purchase that is expected to exceeding $5,000 must be processed through eVA and the Purchasing Office. The $5,000 threshold specified in University Policy 2106 must not be circumvented by “splitting orders”. A split purchase is the breaking down of a single purchase into two or more separate transactions that appear to evade the single transaction limit. An example of a split order would be a purchase of a conference table and matching chairs for a total of $5,200 that is placed in two transaction back-to-back on the same P-card or multiple P-cards in the same unit resulting in a $2,500 order for the conference table that is followed by a $2,700 order for the matching chairs.

What is eVA?
The Department of General Services (DGS) and the Division of Purchases and Supply (DPS) has established eVA to ensure Virginia’s leaders, suppliers, and citizens achieve maximum visibility and access to every Commonwealth procurement opportunity. All orders over $5,000 must be initiated in eVA. All Contracts and payments to individuals at any dollar amount must be initiated in eVA.

Purchasers at Mason use the eVA e-Mall application which allows items to be purchased through an integrated web-based “Punch-Out” catalog or ordered as “Non-Catalog items” identified by sources such as the vendor’s independent catalog, proof or quote. Purchase Orders will integrate with Banner Finance for easy reconciliation and reporting match with Invoice payments.

Commonly Referenced eVA Terms

| Organization Code | This refers to the six-digit department identifier. Organization codes include all codes beginning with “M”. An organization OR fund code is required. For cross-functional initiatives a fund and org code is required. |

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<p>| <strong>Fund Code</strong> | This refers to the six-digit identifier for sponsored projects, capital projects, and other project-specific uses. An organization OR fund code is required. For cross-functional initiatives a fund and org code is required. |
| <strong>Account Code</strong> | This code classifies expenditures by type. The expenditure account codes used in eVA begin with a 7. A listing of these codes may be found on the Fiscal Services web site at <a href="#">Expenditure Account Codes</a>. An account code is required to process an eVA order. |
| <strong>Commodity Code</strong>&lt;br&gt;(<strong>NIGP Code</strong>) | The NIGP Commodity Code is a numeric code from the numbering system used by the Commonwealth of Virginia to categorize the products and services purchased. A commodity code for each item is required to process an eVA order. |
| <strong>PunchOut Catalog</strong> | A PunchOut catalog is a vendor catalog embedded in eVA. It allows purchasers to “PunchOut” items from a vendor’s on-line catalog. All item and vendor information is returned in eVA format. |
| <strong>P-Card</strong> | This is the reference to the Purchase Card in eVA. P-Card information must be manually entered in eVA initially and will then become the default payment method. |
| <strong>Requisition</strong> | A requisition is the starting point of an order. It is an internal document and should not be sent to the vendor or Accounts Payable. It is identified by the prefix PR. |
| <strong>Direct Order (EP#)</strong> | A direct order is indicated by the prefix “EP” in eVA. Direct orders are billed directly to Accounts Payable by the vendor. A direct order is issued when the purchaser does not have a P-Card or does not use his/her P-Card for the purchase. A direct order is also issued when the vendor does not accept P-Cards. In order to receive payment, the vendor must have a Mason G#. Users should conduct a <a href="#">G# lookup</a> prior to completing the order. |
| <strong>Purchase Card Order (PCO#)</strong> | A purchase card order is indicated by the prefix “PCO” in eVA. These are orders placed in eVA with a P-Card. Charges are billed immediately to the purchaser’s P-card account. |
| <strong>Purchase Order (PO)</strong>&lt;br&gt;&lt;strong&gt;Category** | This is a reference to the type of eVA order. The PO category is <strong>R01</strong> for all routine purchases. If the purchase is (as noted below) exempt from the fees associated with eVA, the PO category is <strong>X02</strong>. |
| <strong>Procurement Transaction Type</strong> | The procurement transaction type defines the type of procurement that a requisition is addressing. The most common selections are 20-Supplies-Non-Technology and 30-Non-Professional Services – Non-Technology. |
| <strong>Self-Registered Vendor</strong> | This is a vendor that is registered in eVA and has agreed to pay all fees that may apply. |</p>
<table>
<thead>
<tr>
<th>State-Entered Vendor</th>
<th>This vendor is not registered in eVA but has been paid by the state in the past. All location information has been recorded in eVA.</th>
</tr>
</thead>
<tbody>
<tr>
<td>SWaM Vendor</td>
<td>The term “SWaM” refers to Small, Women, and Minority owned businesses. The use of SWaM vendors is encouraged.</td>
</tr>
</tbody>
</table>

**Banner Finance Integration**

Banner Finance is a comprehensive information system comprised of finance, human resources and student modules. The finance module of this administrative software is used to record financial transactions resulting from activity at the university. All direct bill purchases made through eVA (not using a P-Card), for which Accounts Payable will issue payment, will integrate with Banner Finance and appear as an encumbrance on the fund/org being charged once approved by the fund/org approver for the unit. User should perform a [G# lookup](#) if the order will be directly billed to Accounts Payable to ensure the vendor has a Mason G#.

Purchases made in eVA with a registered P-Card will be recorded in Banner Finance when the transaction is approved by the supervisor in the Bank of America Works system. Approval by the fund/org approver is not required in eVA for transactions paid for with a P-Card.

**eVA Access Request**

The eVA Login Request Form, located at [Forms and Instructions](#), must be completed and include signatures of the applicant’s supervisor, as well as their Banner liaison. The attached Acceptable Use Policy acknowledgement must be signed by the applicant and their supervisor. It should be saved with the title “eVA access for lastname” (with the applicant’s last name in the title) and emailed as an attachment to the Finance Administrative Systems Team (FAST) at fast@gmu.edu. Applicants will receive a notice when access has been granted. Users should login to eVA using their Mason Net ID and password (used for PatriotWeb).

This state-issued form has been modified for Mason users purchasing items of $5,000 or less. The applicant should list a current “deliver to” address that includes the building name, room number, and mail stop number. Only those fields listed as mandatory and in bold are required to be completed.

**eVA Account Overview**

The user will then access the eVA e-Mall application on the eVA homepage at [www.eva.virginia.gov](http://www.eva.virginia.gov) and select “Buyer Login”. Select the second “Log In” option which states “Login with your Agency account.” Then, select “GMU Identify Provider” and click “Continue.” The user will then be prompted to enter their Mason Net ID and password (used for PatriotWeb).

**User Preferences**

To change user preferences, log into eVA and select the Preferences from the top right once logged in. Three user preference options are available to change/update:

1. User Information: Includes e-mail address and phone number
2. Password Change
3. Manage P-Card: Enter or make changes to P-Card information.
• NOTE: P-Card information does not automatically update in eVA. If the purchaser’s card expires or a new card number is issued the old card must be deleted and the new card information must be manually updated in eVA by the user.

Add a Mason Purchase Card (P-Card)
A P-Card may be used to place orders with eVA vendors who accept it as a form of payment. The P-Card is the preferred payment method since it reduces paperwork and expedites payment to the vendor. Once a P-Card payment is processed in eVA, the purchaser must allocate the transaction in the Bank of America Works system to complete the process. P-Card information must be manually entered/added in the eVA system at least 24 hours prior to using the card for eVA purchases. Additional information is available on the Manage P-Card Information guide (Appendix). NOTE: P-Card information does not automatically update in eVA. If the purchaser’s card expires or a new card number is issued the old card must be deleted and the new card information must be manually updated in eVA by the user.

eVA Vendors
A Mason G Number (G#) is required in order to process a payment for a direct order to a Vendor. Use the Vendor G Number lookup available on the Fiscal Services website to search for the proposed vendor (be aware of spaces, punctuation and “doing business as”, etc.) If the Vendor is not listed in the G# database follow the instructions provided on the Vendor registration portal located here: https://fiscal.gmu.edu/purchasing/do-business-with-mason/. Vendors must also be active in the eVA system. Follow the instructions below to ensure the vendor is also active in eVA before beginning an order.

eVA Vendor Accounts
Vendors interested in conducting business with George Mason University and other state agencies must have an active eVA account before a purchase requests can be made, and an invoice can be processed. If a vendor chooses to join eVA at the purchaser’s request, they may visit the eVA homepage and select I Sell to Virginia button for registration information. The eVA Customer Care Team is available at evacustomercare@dgs.virginia.gov or 1-866-289-7367 to assist vendors with the self-registration process. eVA users are required to protect personally identifiable information including the Social Security numbers and Federal Tax ID numbers of consultants, vendors and others in accordance with Federal and State law. These numbers should not be entered on any eVA purchase order. Users should not attach Social Security numbers or COV substitute W-9/W-8 BEN forms to an eVA order.

Benefits for Vendors
A self-registered eVA Vendor will be able to publish a “PunchOut” catalog, which provides eVA users an opportunity to view the vendor’s available goods and services while remaining in the eVA system. Self-registration also provides vendors a number of other tools and resources such as receiving electronic orders, accepting P-Card payments, in addition to automated placement on bidders list, and notifications for business opportunities with Virginia State Agencies, Colleges and Universities.

If a vendor does not appear in eVA when performing a Vendor Search, then the vendor is considered “un-registered.” If you still wish to continue with the vendor, direct them to self-register with eVA using the information provided above. If the vendor is unwilling to self-register they can be state entered by following the instructions provided on the Vendor registration portal located here: https://fiscal.gmu.edu/purchasing/do-business-with-mason/.
Vendor Search

Users should access the vendor search list prior to initiating a purchase requisition in eVA. In addition to verifying that the vendor is registered with eVA (self-registered) or has been paid by the state in the past (state-entered), the user may determine if a vendor is Micro/SWAM certified, accepts P-Card payments, and/or accepts orders electronically. The user may search the listing by entering any portion of the vendor’s name.

For example, if a user types the word “pizza” in the search field this will populate the search results with all related vendor names, locations, etc.

The far-left column, marked Status, will identify vendors as Self (for self-registered vendors) or State (indicating state-entered vendors). The search also specifies the vendor’s acceptance of credit cards or electronic orders. For example, on the right-hand side of the screen, a “Y” in the “Accepts Charge Card” column indicates that the vendor accepts P-Card transactions. A “Y” in the “Accepts Elect Orders” column indicates that the vendor will accept electronic orders. An “N” in either field indicates that that particular option is not available for that vendor at this time.

Selecting the Vendor ID will give additional details on the vendor including a contact phone number and name for the vendor.

A search may also be performed once a user is logged into eVA by selecting Knowledge Center from the eVA Dashboard menu. Then, click on the Supplier Info tab to view the Registered Vendors and/or SWaM and DBE Directory.

eVA Exemptions

Most goods and services must be purchased utilizing eVA, Virginia’s electronic procurement system, however, some exceptions are allowed. If a purchase meets one of the exemption criteria established by the state (listed below) then the purchase does not have to be completed through eVA procurement.

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Purchases that are exempt from eVA procurement

- Individual travel and lodging.
- Registration fees for conferences.
- Small over-the-counter purchases made with the P-Card. Purchases must be made at the site of the sale and picked up by the cardholder. This DOES NOT include orders places on the vendor’s website or by telephone.
- Reimbursements.
- Honorarium payments under $2,000 (total).
- Payments to the Department of Homeland Security.
- Postage (this includes mailing services such as FedEx and UPS).
- Business Cards - may be purchased on-campus through Canon Solutions or online through Worth Higgins using the Mason P-Card. See Printing Contracts Quick Guide.
- Sodexo Catering – should be ordered through the online Catertrax application. Sodexo provides Mason’s on-campus dining and is the preferred caterer.
- Interdepartmental Charges (Recharge process).

An additional category of purchases that are exempt from eVA fees, but must still be initiated and/or recorded in eVA is explained below under the Enter a PO Category section and in the eVA Exemption Guide (Appendix).

eVA Requisitions

The purchasing process at Mason depends upon two criteria: method of payment (is the purchaser using a P-Card or is Accounts Payable going to issue a direct payment to the vendor) and the vendor’s eVA status (is the vendor self-registered in eVA or state-entered).

Before beginning an eVA order, the purchaser determines what vendor is to be used and obtains the following information about that vendor:

- Is the vendor self-registered with eVA? State-entered? Un-registered?
- Does the vendor accept the P-Card?
- Does the vendor accept electronic orders?
- Does the vendor have a Punch-Out catalog in eVA? To search for a vendor Punch-Out from the Dashboard sub menu select Search, then select Catalog, and choose Punch-Out catalogs. A listing of vendors with Punch-Out catalogs will generate.

On the eVA Welcome page, select eMail/eForms to access the eVA eMail application. An explanation of each section of the eVA eMail/eForms Dashboard is provided below.

- **Common Actions**: Create - Requisition: This option allows the purchaser to create a new order in eVA. The purchaser will click on “Requisition” to begin the order.
• **Recently Viewed:** This option will reference the items/orders most recently viewed by the user.

• **To Do:** This window contains orders that have been submitted in eVA but require approval before the order is complete. If the vendor does not accept electronic order submission, the order will usually appear in the purchasers To Do list to indicate that the unit purchaser must print a copy of the order and send it to the vendor via fax or mail.

• **Requisitions - Composing:** This window contains orders which have not been submitted or orders that were submitted but failed integration and must be corrected and resubmitted.

• **Requisitions - Submitted:** This window contains orders which have been submitted but are not yet approved.

• **Requisitions - Denied:** This window contains orders which have been denied.

• **My Documents:** This window contains orders which have been fully approved, as well as orders from all sections noting the order status. Purchasers will locate an order from the My Documents section to obtain the purchase order number (EP# or PCO#).

### Create and Submit a Requisition

From the Dashboard page, under the top left “Create” section click on Requisition. This will take the purchaser to the Title screen. The purchaser may enter the vendor’s name and purchase date as the title of the requisition. Some units also enter fund/org numbers in the order’s title. This allows the purchaser to search for the order in the future. Although it is possible to process orders to multiple vendors through the same requisition, it is recommended that purchaser use one vendor per order.

If the purchaser has registered a P-Card in eVA, it will become the default payment method. If the proposed vendor does not accept the P-Card or if the purchaser would prefer not to use the P-Card for this purchase, he/she will uncheck the “Use P-Card” box and process a direct order that will be paid by Accounts Payable.

### Enter a PO Category

eVA fees are assessed based on the PO Category. All routine purchases and all Punch-Out catalog orders should be assigned PO Category R01 - These purchases will incur eVA fees. Examples include: Office, lab, and other supplies, goods such as T-shirts, promotional items, software, subscriptions (up to 1 year), and other tangible items.

Specific purchases have been determined by the Commonwealth to be exempt from eVA fees and should be assigned PO Category X02 – These purchases will not incur eVA fees. Examples include: Professional membership dues, entertainment (speakers, lecturers, musicians, performers), advertising and other categories.

The complete list is available in the eVA Exemption Guide (Appendix).

### Select a Procurement Transaction Type

Select a Procurement Transaction Type from the dropdown. The categories most frequently selected will be 20-Supplies-Non-Technology (most book, office, lab and student event supply purchases such as pizza for student events and similar items, as well as all purchases from The Supply Room Companies, including purchases of printer cartridges and batteries) and 30-Non-Professional Services – Non-Technology (consultants, guest speakers, entertainers, membership dues, subscriptions, hotels, bus transportation, catering, advertising and similar type transactions). When an eVA order consists of more than one procurement type, purchasers should select the type that represents the largest dollar amount of the order.

As an optional feature, the purchaser may choose to apply a label to the requisition. A label acts as a “quick search” to find and display a list of all items that have the same tag or label. The purchaser would choose Apply Label and either choose a label that has already been created (if any exist) or choose New Label and create one.
Select Next to go to the Add Items screen.

**Add Items**

On the Add Items screen, there will be a list of links to various types of items. To utilize a **Punch-Out catalog**, the purchaser may type the vendor name in the Search field or select PunchOut Catalogs to view a list of vendors who have supplied eVA with a Punch-Out catalog. When the purchaser has located the desired vendor, he/she will select the vendor name to access the vendor’s PunchOut catalog.

![PunchOut Catalog](image)

eVA will direct the purchaser into the online catalog for the selected vendor. Some vendors, such as The Supply Room Companies, will have a quick order form as part of the catalog allowing the purchaser to enter item numbers for the items he/she will purchase. The purchaser may also browse the catalog for the items he/she would like to purchase. When browsing a catalog, the purchaser should take note of the unit of measure for items being purchased. Once all items have been selected and placed into the shopping cart, the purchaser may submit the order to eVA by selecting “Submit Cart.” This checkout process allows eVA to extract the purchase information detail and enter it into the eVA friendly format. For step-by-step instructions please review the Punch-Out Catalog Quick Guide (Appendix).

**Non-Catalog Items**

When processing a non-catalog order, the purchaser will manually enter the item information from the vendor’s paper or independent online catalog. When manually entering item information from a vendor’s paper or independent online catalog, each item will be entered as a separate non-catalog item. For example, if purchasing two items, this step will be repeated twice. To enter the item information, select Create Non-Catalog Item as shown:

![Create Non-Catalog Item](image)
The following fields are required for each Non-Catalog item:

- **Item Description**: The purchaser will indicate the item number and description as it is displayed in the vendor’s print or online catalog.
- **NIGP Commodity Code**: A numeric code used to describe the product or service must be selected. Select *Search for more* from the NIGP Commodity Code drop down list, enter the item descriptions and select *Search*. Click the *Select* button on the far right next to the desired search result. Choose the code which most closely represents the item being purchased.

![Image of NIGP Commodity Code section]

- **Supplier**: In the Supplier field select *Search for More* from the drop-down menu. Type the Vendor name into Search box. To select a vendor, click the *Select* button next to the desired search result. Once the vendor is selected, the contact and other information for that vendor should populate the Location field. If the Location field does not populate automatically, this usually means that there is more than one office or location for this vendor in eVA. Click the *select* button next to the Location field. In the resulting window, select the desired location. The Reg. Type field below the Location field will populate with either Self-Registered or State-Entered depending on the vendor’s status.

![Image of Supplier search and selection]

- **Supplier Part Number**: Enter the item number provided by the vendor for the item being purchased.
- **Quantity and Unit of Measure**: Enter the desired quantity for each item and indicate the appropriate unit of measure per the vendor’s catalog.
- **Price**: Enter the price *per unit* for the item and click *Update Total*.

Once all information has been entered, Select *OK*. For step-by-step instructions please review the No- Catalog Quick Guide (Appendix).

If more than one item is being ordered from this vendor, the purchaser will either repeat the steps above for each subsequent item to be purchased or the line item he/she has just created may be copied to avoid entering the vendor contact data again. Copying lines is performed from the shopping cart screen. To access the shopping cart, click the cart icon on the *Add Items* screen.
To copy a line item, from the shopping cart screen, put a check mark in the box next to the single item and click the *Copy* button.

![Image of shopping cart screen with one copied line item]

The system will copy the line item and the shopping cart will show two of the same item—

![Image of shopping cart screen with two copied line items]

To update the copied line item, place a check mark in the box next to the copied item, marked with a 2, and select *Edit*.

![Image of shopping cart screen with updated copied line item]

On the *Line Item Detail* screen, update the fields that have changed for the new item. Usually the description, quantity, unit of measure, price and commodity code will need to be updated for the new item. Since the same vendor is being used, the contact information entered for the first item has been “copied” and it is not necessary to enter it again.
Select OK and then click the Shopping Cart icon on the Add Items page. The Shopping Cart will now reflect both of the items correctly.

Add Accounting Allocation

Accounting details, including fund or org number and account code, are required elements in the eVA order process. The eVA system will not finalize the purchase without the appropriate accounting information. To view the shopping cart, click on the cart icon.

To add accounting details from the eVA shopping cart, select the checkbox next to “No. Type”, above the list of line-items. Scroll down and select Edit to view the accounting fields.

The required elements on this page include an organization or fund number, and an account code. The organization or fund code indicates the department, organizational unit or project that will be charged for the purchase. The purchaser should enter only an organization or fund code that they are authorized to charge. The account code is a 5-digit code used to classify the purchase by expenditure type. For example, the account code for office supplies is 74120. A list of commonly used expenditure account codes is available on the Fiscal Services website at Expenditure Account Codes. The activity code is an optional element used by cost-sharing units.

To charge more than one fund or org number, the purchaser may use the Split Accounting function. Once the purchaser has entered the necessary accounting codes, they will select OK at the bottom of the page. If prompted to confirm Modified Fields, select Done, then Done again on the Shopping Cart page. This will return the purchaser to the add items screen. The purchaser may proceed by selecting Checkout.

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Checkout and Submission

The checkout screen allows the purchaser to review the details of their order including the title, payment method, PO category and the item descriptions and prices. The purchaser should enter a Need-By date to ensure the contractual responsibility of the vendor to deliver the items. Usually, a date one week from the order date is appropriate.

This page also provides the purchaser to opportunity to include comments on the purchase order for the vendor to review. If a purchaser would like to include a comment for the vendor he/she will select the box for “Visible to Supplier” after entering the comment. Purchasers should select “Mark as Proprietary…” for comments intended to be viewed only by the Purchasing Office and/or other Mason staff.

The final step of the process is to select Submit which will send the order for approval. If the order was paid with a P-Card in eVA then no fund/org approval is required. The purchaser will need to Approve the order in eVA before a purchase order number is issued.

To approve an order, select the PR number under To Do from the eVA Dashboard. Select the green approve button and then “OK”. Once approved, the order will be located in the My Documents window on the Dashboard page. To return to the Dashboard page, select Home.

For non-P-Card orders, directly billed to Mason by vendor invoice, the fund/org approver must Approve the order in eVA before a purchase order number is issued. For P-Card purchases the eVA PO Category (R01, X02, PCO# or “exempt”) must be recorded in Bank of America Works to the appropriate transaction.

When the order is approved, and if the vendor accepts orders electronically, the order will be electronically transmitted to the vendor and be located in the My Documents window on the Dashboard page. The order will be located in the Submitted window until it is approved. If the order is not approved, it will be returned to the Denied window. If the order fails integration, it will be returned to the Composing window. If the vendor does not accept orders electronically, once approved the order will appear in the To Do section for the purchaser to print, fax or mail the order to the vendor. The purchaser will receive email communication from Ariba (eVA) related to the order status.
To print a copy of the order

1. Find the desired PR number in the My Documents window and select it.
2. Find EP or PCO number and select it, then click Print.

Orders Over $5,000
Purchases exceeding the $5,000 departmental limitation are processed through the Purchasing Office. The purchaser will enter the order in eVA as a catalog or non-catalog order. If the P-Card is the default payment method, the Use P-Card box should be unchecked on the Title screen. Once the order has been approved by the unit approver, it is transmitted electronically to the Purchasing Office where it will be assigned to a purchasing office buyer. The Purchasing Office Buyer will then place the order. Once the Purchasing Office Buyer becomes involved, the departmental purchaser may view, but not change, the order.

When placing orders over $5,000, it is important to add comments in the Comment field that may assist the Purchasing Office Buyer to complete the purchase. Quotes, drawings or pictures of the desired items should be attached to the requisition by clicking the Add Attachment button and selecting the appropriate documents. The departmental purchaser should also be sure to check the box next to “mark as Proprietary and Confidential” in both the Comments and Add Attachment sections. This will ensure that the comments and/or attachments are seen only by the Purchasing Office Buyer and not by the vendor(s) being considered for the purchase.

Denied Orders
A purchaser will occasionally receive a message from Ariba (eVA) indicating that his/her order has been denied.

- The purchaser’s approver may deny the purchase. If this occurs, the approver should write a comment in the appropriate field to inform the initiator of their reason(s) for denial.
- The Office of Sponsored Programs (OSP) may deny the purchase. A representative from OSP should write a comment in the appropriate field to inform the initiator of their reason(s) for denial.
- The International Tax Office may delay approval for foreign vendors if required information is missing.
- In other cases, the reason for the order being denied is that it failed to integrate with Banner Finance, the repository for financial transactions at the University.

Common eVA/Banner Finance integration Errors
The eVA to Banner Error Resolution guide (Appendix) provides additional information on common integration errors.
- No Vendor Match – this error means that the vendor is un-registered and has never been paid previously by the State. This error will occur if the purchaser manually enters the vendor’s information in the Supplier field instead of selecting the registered vendor from the eVA vendor’s list. Occasionally, purchasers will receive this error if the vendor is self-registered in eVA but has not been paid by Mason.
- Closed Fiscal Period – this error occurs when orders from previous fiscal years are “copied” and the initiator forgets to change the fiscal year. To correct this error, update the fiscal year to reflect the current fiscal year and resubmit.
• Unauthorized FOAPAL – this error occurs when the purchaser is using a fund or org number that he/she has not been pre-authorized to use. When the eVA user profile is created, all funds and/or orgs to which the purchaser will be charging goods and services must be listed. Very often, responsibilities change and different or new funds and/or orgs are added to a purchaser’s job assignment. When this occurs, it is important for the purchaser to update their eVA authorization. Once the new funds and/or orgs are updated in eVA, resubmit the requisition.

• Document Contains Errors – This is designed as a “catch all” error code and instruction for resolving the error will be contained in the Ariba (eVA) error email.

Orders denied due to failure to integrate with Banner Finance will be returned to the purchaser’s composing window. The purchaser will go into the order by clicking on the PR number, selecting the History tab and then clicking on Denied. One of the above error messages should then be displayed and the purchaser should correct the error accordingly. However, if the order is denied three times, the purchaser will no longer see the order in their composing window and a new order must be created. For assistance with error resolution please contact evaadmin@gmu.edu.

Approve a Requisition

All non-P-Card orders are approved electronically by the purchaser’s supervisor or designated approver before they are submitted to the vendor or returned to the purchaser to approve, print/fax. The Approver should review the order for completeness and accuracy. All orders must have a legitimate business purpose and adhere to Mason’s purchasing policies. Questionable or unallowable requests should be denied and returned to the submitter for review and/or additional comment. The step-by-step process is outlined in the eVA Approvers guide (Appendix).

eVA approvers who will be away from the office for an extended period should delegate their approval authority to another eVA user in their absence. The step-by-step process is outlined in the Delegating Approval Authority in eVA guide (Appendix).

Changes, Cancellations and Returns

If a departmental purchaser changes or cancels an order, or returns some or all of the ordered items, in most cases, those changes should also be recorded in eVA to ensure accurate reporting and fee assessment. When the change represents less than 10% of the order amount up to $199.99, the purchaser is NOT required to enter the changed information in eVA.

Change Orders

A purchaser may change any part of an order by adding or deleting items, or changing the quantity or price of items after submitting the order in eVA. The purchaser should initiate a change order in eVA and call the vendor immediately to verify the changes, referencing the new order number. The step-by-step process is outlined in the eVA Change Order guide (Appendix).

Order Cancellation

If a purchaser wishes to cancel an order after entering the order in eVA, he/she should log-in to eVA and select eMall/eForms. In the My Documents window, select the PR number of the order to be canceled. Select Cancel as displayed here.
The purchaser may add comments to the order and select OK. The canceled order will remain in the purchaser’s My Documents window and will have a new version number applied to the order. The purchaser should also immediately contact the vendor by phone to confirm that he/she wishes to cancel the order and to verify that the vendor has received notification of the cancelled order in eVA.

**Order Returns**

If a purchaser wishes to return items after an order is received, he/she should contact the vendor to determine the process for the return. The vendor will provide instructions on the proper procedure for returning the items. If a purchaser is unsuccessful in negotiating a return with a vendor, he/she may contact the Purchasing Office at 3-2580.

After the merchandise has been returned, the purchaser should follow up to ensure that a credit has been issued by the vendor to the appropriate P-Card account, a correct invoice received or a refund check processed. A change order should be processed in eVA following the guidelines above.

**Payment and Receiving**

**P-Card purchases** are NOT approved in eVA or received in eVA by the unit approver. The PO Category (R01, X02), the PCO number, or “exempt” must be entered into Bank of America Works in the GL04 field during the P-Card reconciliation. The P-Card User Guide may be accessed from the Fiscal Services website at Cardholder Manual.

**Direct Orders:** If a purchaser does not have a P-Card or a vendor does not accept the P-Card, the vendor will invoice the University. When the items are received the purchaser must acknowledge delivery. For orders totaling more than $5,000, Accounts Payable will send an email to the purchaser asking if the item(s) were received by the department or unit. Response to this email will serve as receipt of these items. If the purchase is $5,000 or less the items may be received electronically in eVA by following the instructions on the eVA Order Receiving guide (Appendix).

*Please Note: If the department receives an invoice from the vendor, the invoice should immediately be sent to Accounts Payable, MSN 3C1 or acctpay@gmu.edu. The department must note the EP# on the invoice. Invoices for dues and other items may be electronically attached to an eVA order, but the invoice must also be sent to Accounts Payable, MSN 3C1 or acctpay@gmu.edu. Accounts Payable requests email certification of receipt or approval of payment from eVA users in the following situations.

**Receiving Tip:** When processing non-P-Card payments for items such as subscriptions, professional membership dues and service contracts, the purchaser should “receive” these items in eVA as soon as the order is approved and immediately send the vendor invoice with the EP# noted to Accounts Payable. The Accounts Payable department pays vendors 30 days after receipt of the invoice and goods or services. Receiving these types of orders in eVA, even before the first subscription issue has arrived, for example, will ensure that the payment process begins, and the vendor will be paid in a timely manner.
### Contact Information

<table>
<thead>
<tr>
<th>Type of Assistance</th>
<th>Department</th>
<th>Phone/Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendor invoices</td>
<td>Accounts Payable</td>
<td>3-2580, <a href="mailto:acctpay@gmu.edu">acctpay@gmu.edu</a></td>
</tr>
<tr>
<td>Contracts or purchasing policies</td>
<td>Purchasing Office</td>
<td>3-2580, <a href="mailto:purch1@gmu.edu">purch1@gmu.edu</a></td>
</tr>
<tr>
<td>Purchases over $5,000</td>
<td>Purchasing Office</td>
<td>3-2580, <a href="mailto:purch1@gmu.edu">purch1@gmu.edu</a></td>
</tr>
<tr>
<td>eVA process questions</td>
<td>Purchasing, eVA Support</td>
<td>3-2580, <a href="mailto:evaadmin@gmu.edu">evaadmin@gmu.edu</a></td>
</tr>
<tr>
<td>P-Card process questions</td>
<td>Purchasing, P-Card Office</td>
<td>3-2580, <a href="mailto:pcardadm@gmu.edu">pcardadm@gmu.edu</a></td>
</tr>
<tr>
<td>P-Card applications</td>
<td>Purchasing, P-Card Office</td>
<td>3-2580, <a href="mailto:pcardadm@gmu.edu">pcardadm@gmu.edu</a></td>
</tr>
<tr>
<td>P-Card Bank of America Works</td>
<td>Purchasing, P-Card Office</td>
<td>3-2580, <a href="mailto:pcardadm@gmu.edu">pcardadm@gmu.edu</a></td>
</tr>
<tr>
<td>eVA access and user updates</td>
<td>Finance Administrative Systems</td>
<td>3-2574, <a href="mailto:fast@gmu.edu">fast@gmu.edu</a></td>
</tr>
<tr>
<td>Other Fiscal policies</td>
<td>Fiscal Services Communications</td>
<td>3-5966, <a href="mailto:fscomm@gmu.edu">fscomm@gmu.edu</a></td>
</tr>
<tr>
<td>Advanced technical eVA support</td>
<td>eVA Customer Care Support</td>
<td>800-289-7367, <a href="mailto:evacustomercare@dgs.virginia.gov">evacustomercare@dgs.virginia.gov</a></td>
</tr>
</tbody>
</table>
Manage P-Card Information Guide

Use this guide to add a new P-Card to your eVA user profile or update an existing P-Card in eVA. Once a P-Card is added to the user profile, it will become the default payment method for all purchases of $5,000 or less. *The eVA system will update within 24-hours. The P-Card will not be available for use until after the system update.

Step-by-Step

2. Select “Buyer Login” and then “Login with Agency account.”
3. Choose George Mason University, then enter NetID and password (same as Patriot Web).
4. Select “Preferences” from the top menu bar.

5. Select “Manage PCard Information.”

6. To add a new P-Card select “Create New P-Card.” or to modify an existing P-Card click on the P-Card Alias name.

7. Complete the required information on the P-Card Details screen.
   a. Enter the card number into the P-Card Number field and the Confirm field.
   b. The P-Card Alias should be the P-Cardholders NetID and the last four digits of the card number (Example: jadams15####).
   c. Enter the Cardholders name as shown on the card.
   d. Personal Liability field should be “No.”
   e. P-Card Type is “Purchase Card.”
   f. Enter the expiration date on the card in MM/DD/YYYY format. For the day, enter the last day of the expiration month (Example: card expired 10/20, enter the date 10/31/2020).
   g. Click the Submit button. A screen confirming the changes will appear. Click “OK” to return to the “Preferences” menu.

8. Select “Return to Portal Home Page” from the left side menu to return to the eVA homepage.
eVA Exemption Guide

Most goods and services must be purchased utilizing eVA, Virginia's electronic procurement system, however, some exceptions are allowed. If a purchase meets one of the exemption criteria established by the state (listed below) then the purchase does not have to be completed through eVA procurement.

Purchases that are exempt from eVA procurement:

- Individual travel and lodging.
- Registration fees for conferences.
- Small over-the-counter purchases made with the P-Card. Purchases must be made at the site of the sale and picked up by the cardholder. This DOES NOT include orders placed on the vendor’s website or by telephone.
- Reimbursements
- Honorarium payments under $2,000 (total).
- Payments to the Department of Homeland Security.
- Postage (this includes mailing services such as FedEx and UPS).
- Business Cards - may be purchased on-campus through Canon Solutions or online through Worth Higgins using the Mason P-Card. See Printing Contracts Quick Guide.
- Sodexo Catering – should be ordered through the online Catertrax application. Sodexo provides Mason’s on-campus dining and is the preferred caterer.
- Interdepartmental (Recharge process)

Routine Purchases (R01)
The items listed below are examples of items that are subject to eVA fees (charged to Mason). These are items that may be purchased in eVA or directly with a vendor using a P-Card and must be classified as an “R01” in eVA and/or during the Bank of America allocation process.

1. Food purchases placed on the phone or online.
2. Purchases made for supplies, etc. over the phone through an online portal (i.e. Purchases made on Amazon)
3. Purchases for T-shirts, promotional items, software, lab supplies
4. Tangible items not otherwise classified.
5. Subscriptions (periodicals, services, software, etc. for bona fide business purposes, NOT TO EXCEED ONE YEAR)

Purchases exempt from eVA fees (X02)
The items listed below are exempt from eVA fees (charged to Mason). These are items that may be purchased in eVA or directly with a vendor using a P-Card, however, the PO Category field should be changed to “X02” (instead of R01) in eVA and/or during the Bank of America allocation process. This way eVA will not charge Mason a transaction fee for the purchase.

1. Professional organization membership dues.
2. Entertainment payments to: speakers, lecturers, musicians and performing artists. This DOES NOT include consultants, seminar facilitators or contracted workshop instructors.
3. Honorarium payments of $2,000 or more.
4. Accreditation fees and academic testing services.
5. Advertisements in newspapers, magazines, journals, radio or television.
6. Real estate leases.
7. Exhibition rental fees for exhibitions of historical artifacts or works of art.
8. Public utility payments (electric, natural gas, water sewer).
9. Purchases from public auction (non-electronic) and State Agency to State Agency payments.
PunchOut Catalog Quick Guide

Users should access the vendor search list prior to initiating a purchase requisition in eVA. In addition to verifying that the vendor is registered with eVA (self-registered) or has been paid by the state in the past (state-entered), the user may determine if a vendor is Micro/SWAM certified, accepts P-Card payments, and/or accepts orders electronically. Users should also perform a G# lookup if the order will be directly billed to Accounts Payable (non P-Card payments) to ensure the vendor has a Mason G number. The vendor must have a G number in order to be issued payment. Instructions for vendors and Mason staff is available on the Do Business with Mason webpage.

Step-by-Step

1. Go to: http://eva.virginia.gov. (For system access complete the eVA Login eVA 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. Under the Go To tab selected eMall/eForms.
5. On the new screen, Select Procurement and then Create Requisition
6. In the “Title” field enter a name for the purchase (e.g., vendor, date, org/fund).
7. If a P-Card has been added to the users Profile, then the Use PCard box will automatically be checked. If the vendor does not accept P-Card and/or you are not using the P-Card for payment then uncheck the box.
8. The “on Behalf of,” “Agency Code,” and “Fiscal year,” fields should populate automatically.
9. In “PO Category” field, select “R01” for routine purchases or “X02” for specific eVA exemptions.
10. Select a Procurement Transaction Type from the drop down.
11. DO NOT select “Confirming Order” or “Bypass ERP”
12. Once all header information is added, scroll down to the Line Items and click “Add from Catalog”
13. Use the Catalog Search to locate the vendor
14. Click on the description below the vendors name to open the vendor’s PunchOut Catalog
Step 13

Step 14

15. Browse the PunchOut catalog and select the items to purchase by adding them to the cart.
16. When all items have been added, click the “order,” “checkout,” or “submit cart” link to transfer the ordering information from the PunchOut catalog into the eVA interface.
17. The system will redirect you back to the “Summary” page.
18. On the Summary page in the “Line Item” box select items to allocate to the proper accounting information. Items can be allocated all together or individually if using different fund/org for each item.
19. Select “Edit.”
20. Scroll down to “Accounting by Line Item” and enter the following:

   - **Fund #:** Grants/Capital Projects (begin w/2 or 9)
     - OR
   - **Org #:** Organization/Departments (begin w/M)
     - AND
   - **Account Code:** Mason 5 digit Account #
   - **Activity Code:** Only used with certain grant Funds

   *Note that some cross functional initiatives may require a Fund and an Org to be properly accounted.*
21. Select the “OK” button at the bottom of the page.
22. On the following page the system may ask you to review accounting information, select “Done.”
23. Scroll down to “Shipping,” click the calendar icon next to “Need by Date” and select a date.
24. Enter comments or attachments for supplier or Purchasing Office as needed.
25. Select “Submit” to complete requisition.
26. The order will be sent for electronic approval to the unit budget approver. An order over $5,000 will be submitted for approval by the Purchasing Office.

**Approve and/or Print the Requisition**

1. For orders paid with a P-Card in eVA the 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.

2. If the vendor accepts electronic orders, the order is sent electronically from eVA to the vendor.
3. 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.

*Once the good/services have been received complete the Receiving and/or P-Card allocation as appropriate.*
Non-Catalog Quick Guide

Users should access the vendor search list prior to initiating a purchase requisition in eVA. In addition to verifying that the vendor is registered with eVA (self-registered) or has been paid by the state in the past (state-entered), the user may determine if a vendor is Micro/SWAM certified, accepts P-Card payments, and/or accepts orders electronically. Users should also perform a G# lookup if the order will be directly billed to Accounts Payable (non P-Card payments) to ensure the vendor has a Mason G number. The vendor must have a G number in order to be issued payment. Instructions for vendors and Mason staff is available on the Do Business with Mason webpage.

**Step-by-Step**

1. Go to: [http://eva.virginia.gov](http://eva.virginia.gov). *(For system access complete the eVA Login eVA 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. Under the Go To tab selected eMall/eForms.
5. On the new screen, Select Procurement and then Create Requisition

6. In the “Title” field enter a name for the purchase (e.g., vendor, date, org/fund).
7. If a P-Card has been added to the users Profile, then the Use PCard box will automatically be checked. If the vendor does not accept P-Card and/or you are not using the P-Card for payment then uncheck the box.
8. The “on Behalf of,” “Agency Code,” and “Fiscal year,” fields should populate automatically.
9. In “PO Category” field, select “R01” for routine purchases or “X02” for specific eVA exemptions.
10. Select a Procurement Transaction Type from the drop down.
11. DO NOT select “Confirming Order” or “Bypass ERP”
12. Once all header information is added, scroll down to Line Items and click “Add Non-Catalog Item”
13. In Full Description field enter information for the first item
14. Use the drop down next to NIGP Commodity Code to select “Search for more”
15. Use the drop down next to Supplier to select “Search for more”
16. Enter the vendor name, click on search. Press “Select” next to the appropriate vendor.
17. Enter the Supplier Part Number and Contract # if applicable.
18. Enter the Supplier Aux Part ID if applicable then enter the Quantity, Unit of Measure and Price for the item (as appropriate to the purchase)

19. Select “Update Total” and then “OK”

20. The system will redirect you back to the “Summary” page

21. Scroll to the “Line Items” box to review the items you have already added to your order

22. To add additional items click on “Add Non-Catalog Item” and repeat Steps 13-19 for each additional item.

23. On the Summary page in the “Line Item” box select items to allocate to the proper accounting information. Items can be allocated all together or individually if using different fund/org for each item.

24. Select “Edit”

25. Scroll down to “Accounting by Line Item” and enter the following:
   - **Fund #**: Grants/Capital Projects (begin w/2 or 9)
     - OR –
   - **Org #**: Organization/Departments (begin w/M)
     - AND –
   - **Account Code**: Mason 5 digit Account #
   - **Activity Code**: Only used with certain grant Funds

*Note that some cross functional initiatives may require a Fund and an Org to be properly accounted.

27. Select the “OK” button at the bottom of the page.

28. On the following page the system may ask you to review accounting information, select “Done”

29. Scroll down to “Shipping,” click the calendar icon next to “Need by Date” and select a date.

30. Enter comments or attachments for supplier or Purchasing Office as needed.

31. Select “Submit” to complete requisition.

32. The order will be sent for electronic approval to the unit budget approver. An order over $5,000 will be submitted for approval by the Purchasing Office.

**Approve and/or Print the Requisition**

1. For orders paid with a P-Card in eVA the 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.

2. If the vendor accepts electronic orders, the order is sent electronically from eVA to the vendor.

3. 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.

*Once the good/services have been received complete the Receiving and/or P-Card allocation as appropriate.*
eVA to Banner Integration Error Resolution Guide

This document outlines the steps needed to resolve purchase requisition integration errors between eVA and Banner. Instructions are provided to properly troubleshoot and correct errors.

**eVA to Banner Integration Overview**

The outline below provides an overview of the processing steps involved with the eVA Integration:

1. Purchase Requisitions are prepared in eVA through normal processing steps.
2. Once completed and approved, the eVA Purchase Requisition (EP#) will be sent to Banner automatically.
   a. Banner receives the order and checks the vendor status: Does the Vendor exist? Does the address match? Are the sWAM codes correct?
   b. Banner then verifies other aspects of the order. Is the user allowed to process orders in Banner?
   c. Is the Fund/Org active and allowable? Is the fiscal period open?
3. If all criteria are met, Banner processes the purchase requisition using the eVA purchase requisition number without the leading EP. The full EP# can be found in the document reference field.
4. Banner posts the purchase requisition through normal processing which triggers an approval message to be sent back to eVA. This notifies the purchaser that the order has been successfully processed.
5. Orders that fail in any of the above steps are returned to Composing status in eVA. An error message may be viewed in eVA on the History tab by clicking the word “Denied.”
6. Once errors are corrected, the purchaser will resubmit the order in eVA and the process begins again.

**Error Processing – Workflow Codes**

Below are four of the most common errors that may occur as a result of data entry errors. Each error is specifically defined and identified by the workflow (WF) codes and descriptions.

<table>
<thead>
<tr>
<th>WF CODE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>101001</td>
<td>No Vendor Match. Order Denied.</td>
</tr>
<tr>
<td>101003</td>
<td>Unauthorized FOAPAL. Order Denied.</td>
</tr>
<tr>
<td>101010</td>
<td>Document Contains Errors, Order Denied.</td>
</tr>
</tbody>
</table>

When any of the above errors is generated, an email will be sent to the evaadmin@gmu.edu email inbox, where a Mason eVA Customer Support team will research and advise the unit on how to correct the error. An email will also be sent to the purchaser to inform him/her of the error. A description of the error code and the steps the purchaser should take to correct the problem are listed below.

**A. 101001 – No Vendor Match. Order Denied.**

The reason for this error is usually: 1) the vendor is inactive or not set up in Banner, 2) the vendor is not registered in eVA, or 3) the vendor is in Banner but the tax identification number (TIN) or eVA Vendor Location ID (VLIN) number is incorrect. If this error occurs, the purchaser will receive an email notification.

1. Log into eVA and locate the purchase requisition in the Composing folder.
2. Open the purchase requisition, click on the History tab and view the comments. These orders can be identified by: Warning – Wrong or missing supplier information.
3. If this is found, check to be sure the vendor is registered in eVA and has a G-number with the university.

To check if the vendor has a G-number consult the Banner Vendor G# Lookup link at the Fiscal services website. If the vendor is not in the G-number search, then an account must be created in Banner for the vendor. The vendor should complete a Commonwealth of Virginia Substitute W-9 form using the instructions provided on the Do Business with Mason webpage.
To check if the vendor is registered in eVA, consult the eVA Vendor List. If the search does not yield the preferred vendor then the vendor should be registered in eVA either as a self-register vendor or a state-registered vendor.

B. 101003 – Unauthorized FOAPAL. Order Denied.
This error is received when the buyer processing the order in eVA is not authorized to process transactions against a particular Fund or Organization number in Banner. If this error occurs, the buyer will receive an email notification.

1. Log into eVA at https://www.eva.virginia.gov/ and locate the purchase requisition with the problem in the Composing folder > Open the purchase requisition > click on the history tab and view the comments. These orders can be identified by: “Unauthorized FOAPAL”.
2. If a data entry error occurred, the buyer should enter the correct Fund or Org number and resubmit the requisition. If the buyer should have access to order for the Fund or Org, he/she should submit a Finance Self Service and e~Print Account Modification Request Form to fast@gmu.edu asking for the change in access to be allowed to place orders for this Fund or Org number. If the buyer is unfamiliar with this form, contact fast@gmu.edu directly for assistance. Once the buyer’s access level is corrected, the order may be resubmitted.

C. 101009 – Fiscal Period is Closed. Order Denied.
This error is received when orders are copied from a prior fiscal year and submitted without updating the fiscal year field to the current fiscal year. If this error occurs, the buyer will receive an email notification.

1. Log into eVA at https://www.eva.virginia.gov/ and locate the purchase requisition in the Composing folder.
2. Open the purchase requisition, click on the history tab and view the comments. These orders can be identified by: Fiscal Period Is Closed.
3. The buyer should view the fiscal year selected. The fiscal year should be updated to the current fiscal year. When orders placed very close to the end of the fiscal year (prior to June 30) need to be posted to the next fiscal year, the buyer should hold the order until the future fiscal year is open in Banner.

This error is designed as a “catch all” error code to note errors that are not identified by the prior errors. If this error occurs, the buyer will receive an email notification.

This error may be received in the following instances:
1. If a copied order contains old index numbers, the order will fail. Only a valid Fund or Org number may be used. Index numbers are no longer valid.
2. If a buyer enters both a Fund and an Org number in eVA. Only one value is valid. A fund number should be entered for sponsored projects.
3. If a buyer adds a line item and fails to enter a fund or an org, this error will occur.
4. Vendor is inactive in Banner and needs to submit a new Substitute W-9 form to papadmin@gmu.edu.

Log into eVA at https://www.eva.virginia.gov/ and locate the purchase requisition in the Composing folder. Review for anything out of the ordinary. If none of the above problems seem to fit, or you cannot readily find the cause of the problem, contact a Mason eVA Customer Support Team at 3-2580 or evaadmin@gmu.edu for assistance.
eVA Approvers Guide

Approvers are notified by email when a transaction is awaiting their approval in eVA. Approvals are usually handled by users who have been assigned an approval role. Any user who is a member of that group can approve the transaction. Depending on your agency/entity setup, you might encounter requisitions/eForms that display a specific individual name and not a role.

**Step-by-Step**

2. Click on Buyer Login, select “Login” under the heading Log in with your Agency Account. Select, George Mason University then enter your Mason Net ID and Patriot Web password.
3. Under the Go To tab selected eMall/eForms.
4. You can access the approvals directly from the “To Do” section or from the “My Approvals” tab.

5. When the ‘Approve’ link is chosen, or if you click an ID from the ‘Pending My Approval’ on the Portal screen, the APPROVAL SUMMARY screen appears. This view contains most information you need to make an approval decision for that requisition, including a detailed list of line items ordered, the approval flow for the requisition, and any comments the preparer has added.
6. Before you approve a requisition, review it carefully. Small details can become big problems when mistakes go unnoticed. Although the APPROVAL SUMMARY screen displays most details, it does not show everything. If you want to review all transaction details (e.g. Shipping details, line attachments, etc.), click the Requisition Number link that appears above the first line item.

7. When you have completed your review, click Approve or Deny. The requisition will disappear from your To Do list. The preparer will be able to see your approval on the Approval Flow tab of the REQUISITION DETAILS screen.

### Approval Review Guide

<table>
<thead>
<tr>
<th>Detail to Review</th>
<th>Impact on Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Codes</td>
<td>Account Code fields might have been auto-populated with default values from the user’s BSO profile. All requisitions should be evaluated to ensure they carry the correct Account codes</td>
</tr>
<tr>
<td>Supplier</td>
<td>Is the vendor correct? No requisition should be processed with a ‘Vendor to be Determined’ appearing in the Supplier field.</td>
</tr>
<tr>
<td>Dollar values at line level and Total Cost</td>
<td>Evaluate the total dollar amount of the requisition. Negative line item amounts are permitted by the system but may not be permitted by the agency.</td>
</tr>
<tr>
<td>Bill to &amp; Ship to</td>
<td>Verify that the addresses are correct for each line item.</td>
</tr>
<tr>
<td>Comments</td>
<td>Comments provide specific details about what is being purchased and why.</td>
</tr>
<tr>
<td></td>
<td>• Verify the details and whether the comments will be included on the purchase order.</td>
</tr>
<tr>
<td></td>
<td>• If they are to be included on the purchase order, the Visible to Supplier checkbox must be selected.</td>
</tr>
<tr>
<td></td>
<td>• Also review comments inserted by prior approvers.</td>
</tr>
<tr>
<td>Attachments</td>
<td>Attachments provide specific details about what is being purchased and why.</td>
</tr>
<tr>
<td></td>
<td>• Verify the details and whether the attachment(s) will be included on the purchase order.</td>
</tr>
<tr>
<td></td>
<td>• If they are to be included on the purchase order, the Visible to Supplier checkbox must be selected.</td>
</tr>
<tr>
<td>Approval Flow</td>
<td>Verify the approval flow includes all required parties. Additional approvers may be added, if necessary.</td>
</tr>
<tr>
<td>Shipping Details</td>
<td>If the ‘See Line Item Shipping Details’ checkbox on the Summary screen is checked, verify details at the line level.</td>
</tr>
</tbody>
</table>
Delegating Approval Authority in eVA

Approvers in eVA who will be away from the office for an extended period should delegate their approval authority to another eVA user in their absence.

Step-by-Step

1. Log into eVA with username and password
2. In the “Go To” menu Select “eMall/eForms”
3. From the “My Home” table, under Preferences, select “Delegate authority”.
4. On the next screen, fill out the fields.
5. Use the drop down and search by “E-mail Address” to select a Delegatee*.
   *The individual selected must already have access to eVA.
6. Select “Delegation Start Date” and “Delegation End Date”
7. Enter a “Delegation Reason” for why this temporary delegation is taking place.
8. Once the Delegate screen is completed, select “Next”.
9. On the Approval Flow page, select “Next”.
10. On the Review Changes page, make sure all information is correct before selecting “Submit”.

Finance Learning & Engagement
https://fiscal.gmu.edu/training/obtain-training-materials/

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eVA Change Order Guide

When a department purchaser changes or cancels an item, returns some or all of the ordered items, or the invoice reflects an increased amount these changes should be recorded in eVA to ensure accurate reporting and fee assessment. The purchaser should initiate a Change Order in eVA and call the vendor immediately to verify the changes, referencing the new Purchase Order number. **If the amount difference is less than 10% of the order amount or less than $199, the purchaser is NOT required to enter the change information in eVA.**

**Step-by-Step**

1. Login to eVA and select *eMall*eForms from the top left menu.
2. From the Dashboard, locate the PR# in the *My Documents* section and select it.
3. Once the PR# is displayed select “Change” to initiate the change order.
4. You will be asked to *Confirm Edit*, click “OK” to continue.

5. Change the necessary information as needed:
   a. To change a line item, click the checkbox next to the line item and select “Edit.” Change the necessary information and then “Save.”

![Change Order in eVA]

   b. To delete a line item, click the checkbox next to the line item and select “Delete.” The item will be removed and you will see the item listed under a new heading “Deleted Line Items.”

6. Once all changes have been captured, click “Checkout,” verify the order information and then “Submit.”
7. The first change to an order will add the suffix “V-2” to the order title. The next change to the same order will reflect “V-3.” An order may only be changed three times. A new order must be created for subsequent changes.

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Revised June 2022
eVA Order Receiving Guide

If the purchase is $5,000 or less the items may be received electronically in eVA. When processing non-P-Card payments for items such as subscriptions, professional membership dues and service contracts, the purchaser should “receive” these items in eVA as soon as the order is approved and immediately send the vendor invoice with the EP# noted to Accounts Payable. The Accounts Payable department pays vendors 30 days after receipt of the invoice and goods or services. Receiving these types of orders in eVA, even before the first subscription issue has arrived, for example, will ensure that the payment process begins, and the vendor will be paid in a timely manner.

Step-by-Step

2. Click on Buyer Login, select “Login” under the heading Log in with your Agency Account. Select, George Mason University then enter your Mason Net ID and Patriot Web password.
3. Under the Go To tab selected eMall/eForms.
4. When the eMall home screen appears, click on the PR# from your “My Documents” section.
5. Once the PR# is open, click the “Receive” button.

6. To receive all items on the order: Click the ‘Accept All’ button. You may enter the Date received for each line item or check the box to “Select ALL lines” and then enter a new date.
7. To record partial receiving on the order: Enter the quantity or amount (whichever is applicable), in the Accept/Return field.
8. If an item is received damaged, or should not have been sent by the vendor, upon immediate receipt of item(s), denote the quantity rejected in the REJECT field.
9. The “Close Order” option will default to “No.” You should only change this to “Yes” if all items on the order have been received and you would like to close the purchase order and release any encumbrance.
10. Review the Summary screen to ensure accuracy and then Submit.
Policy 2106: Purchase of Goods and Services

universitypolicy.gmu.edu/policies/purchase-of-goods-and-services/

University Policy Number 2106
Categorized: Financial
Responsible Office: Fiscal Services, Purchasing
Related Law & Policy:
- The Restructured Higher Education Financial and Administrative Operations Act (Virginia Code § 23.1-1000 et seq.)

I. Scope
This policy applies to all George Mason University faculty, staff, and students.

II. Policy Statement
As an Agency of the Commonwealth of Virginia, George Mason University has a public obligation to perform its procurement in accordance with the intent of the laws of the Commonwealth. The intent of the Virginia General Assembly is set forth in the “Rules Governing Procurement of Goods, Services, Insurance and Construction by a Public Institution of Higher Education of the Commonwealth of Virginia,” §3.0 of the second enactment clause of Chapters 824 and 829 of the 2008 Acts of Assembly of Virginia. Elements of intent include: that Agencies obtain high quality goods and services at a reasonable cost; that competition be sought to the maximum extent possible; that all qualified vendors have access to public business; and that procurement procedures be conducted in a fair and impartial manner. It is further the intent of the Virginia General Assembly that the provisions of the Governing Rules apply in all cases where there is to be a contract between a governmental body and a nongovernmental body, regardless of the source of funds by which the contract is to be paid or in the absence of any monetary consideration flowing to either party.

The Board of Visitors of George Mason University has vested specific signature authority in the President. Further delegation of this authority to contractually obligate the University must be provided in writing.

It is the policy of the University to contribute to the establishment, preservation and strengthening of small businesses and businesses owned by women and minorities and to encourage their participation in procurement activities. The University encourages contractors to provide for the participation of small businesses and businesses owned by women and minorities through partnership, joint ventures, subcontracts, or other contractual opportunities.

III. Responsibilities
A. Purchasing Goods and Services
Goods and services that cost $5,000 or less may be purchased by individuals with account responsibility and their designees. Mandatory contracts for purchasing all furniture, office supplies, and others, as designated by the Purchasing Department, must be honored at all dollar amounts. In addition, all staff will assist in the standardization of purchases for commonly procured goods and services by utilizing institution-wide contracts, where available. The Purchasing Department is responsible for purchasing and leasing all goods and services for the University that cost more than $5,000, except: 1) those associated with the Capital Outlay process and 2) real estate rentals and leases. Capital Outlay procurement is the responsibility of Facilities Planning (construction/architectural). Business Services has the sole responsibility to negotiate real estate rentals and leases and any changes to existing rentals and leases.
B. Contract Administration

A Contract Administrator will be designated to monitor and support contracts for delivery of goods and services which occur over an extended time period. The contract administration process delegates authority, which allows for direct communications between the representative of the University receiving the goods/services and the vendor, with the aim of facilitating and verifying desired performance standards. Active contract administration and written, annual evaluation of vendor performance are the cornerstones of effective outsourcing. Contract Administrators are restricted from making any commitment or conducting any negotiations which change the scope of the contract or may result in modified financial expenditure. Members of the Purchasing Department are available to consult with Contract Administrators on any matter, and must become involved to issue written change orders and renewals, and to formally address performance shortcomings, non-renewals and contract terminations.

IV. Compliance

Failure to comply with this policy may result in revocation of delegated purchasing authority by the Chief Purchasing Officer.

All persons engaged in purchasing activity greater than $5,000 will have a letter providing specific levels of authority. In the absence of such written authorization, University faculty, staff, and students are not permitted to sign contracts or make obligations on behalf of the University to a private vendor. Such actions taken without proper authority will be considered taken at personal financial risk.

V. Dates

A. Effective Date:

This policy is effective July 1, 1999. This Administrative Policy shall be reviewed and revised, if necessary, annually to become effective September 1, unless otherwise noted.

B. Date of Most Recent Review:


VI. Timetable for Review

This policy, and any related procedures, shall be reviewed every three years or more frequently as needed.

VII. Signatures

The policies herein are effective July 1, 1999. This Administrative Policy shall be reviewed and revised, if necessary, annually to become effective at the beginning of the University’s fiscal year, unless otherwise noted.

Approved:

__/S_____________________
Senior Vice President for Administration and Finance

__/S_____________________
Provost and Executive Vice President

Date Approved: May 20, 2004
Revised: June 2, 2020