Procedures for Ordering IT Goods and Services by In-Scope Executive Branch Agencies

July 2011

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General Guidance

1. **IT goods and services as related to these instructions are defined by the list provided at the following site**:

   http://www.vita.virginia.gov/scm/default.aspx?id=85

   Once at this site, select VITA's IT Goods and Service List.

   In-scope goods and services are those identified in the above list by a "Y" in the "In-Scope to VITA" column. Items with an "N" in the column are defined as out of scope.

   For a copy of the VITA Hardware Standards go to the following site: **http://www.vita.virginia.gov/itpartnership/documents/CH_COMMS_DeskTopStandards.pdf**

2. **Orders for in-scope IT goods and Services:** VITA retains all procurement authority for purchasing in-scope IT goods and services. All orders for in-scope IT goods and services must be entered in eVA and routed to VITA for review and approval. Follow the below instructions in structuring the order:

   1. Select the appropriate eVA "V" PO Category at the requisition header.
   2. The use of Pcards is not authorized for in-scope orders. If a Pcard is loaded to eVA account, uncheck this pcard block at the Add Title screen.

   - Do not check the "Send to eProcurement" block on the Add Title Screen.
   - The eVA order will be created as a non-catalog order.
   - The Vendor selected will be Virginia Information Technologies Agency (VITA).
   - The unit value of all items will be 0.
   - In the description field enter the specifications of the product or service required. If there are lengthy specifications, attach them to the eVA requisition.
   - If there is a desired vendor, model, etc., provide that information in the description or comments.
   - Attach any vendor quotes that have been obtained.
   - Enter your agency "Bill To" address.
   - Complete and attach a VITA-Information Services Procurement Justification Form (see Attachment A)
   - Complete the remainder of the requisition in the same manner as other requisitions for your agency and submit.

   The purpose of using the "V" PO category in the requisition is to route the requisition to VITA. The use of the "V" PO category adds the below approvers to the standard agency eVA workflow:

   - Tech Compliance Review - Centralized review by NG to determine that the requirement complies with infrastructure standards.
   - Business Review – Review by VITA for pricing and sourcing.

- AITR Review - Review by the Agency Information Technology Resource to approve the financial commitment by the agency.

All orders to VITA for in-scope goods and services must be received in eVA. See section 4 below for detailed instructions.

3. **Orders for out of scope IT Goods and Services:** Agencies have been delegated procurement authority for out of scope IT goods and services up to $100,000 and can order these goods and services without routing the requisition to VITA. VITA retains procurement authority for out of scope goods and services greater than $100,000. The below rules apply to out of scope purchases of IT goods and services:

Out of scope orders less than $100,000 (Do not route to VITA):

- Enter the appropriate standard PO category (Not "V" category)
- Appropriate use of agency purchasing cards is authorized.
- Enter the actual supplier as the Vendor.
- Enter the agency "Bill To" address.
- Enter the actual order dollar value.
- Enter specifications of the product or service required in the description field.

Out of scope orders over $100,000 (All must be routed to VITA):

- Pcards are not authorized for these orders.
- Use the "V" PO category for each of the situations outlined below.
    1. **Non-contract out of scope orders over $100,000 (Procurement to be conducted by VITA):**
        - Enter the "V" PO category.
        - Enter Virginia Information Technologies Agency as the vendor.
        - Enter the requesting agency "Bill To" address.
        - Enter the estimated dollar value of the requirement.
        - Attach specifications for the goods or services requested.
        - Attach any available vendor quote.
    2. **VITA delegation of one time authority over $100,000 to the agency:**
        - Agency conducts procurement through the IFB/RFP process.
        - Award contract.
        - Create eVA requisition to the successful vendor.
        - Enter the "V" PO category to route the requisition to VITA for review.
        - Enter the agency "Bill To."
        - Attach a copy of the awarded contract.
    3. **Out of scope orders from an existing contract**:
        - Enter the "V" PO category.
        - Enter the actual supplier as the vendor.
        - Enter contract number in the contract number field.
        - Enter the agency "Bill To."
    4. **Out of scope sole source orders**:
        - Enter the "V" PO category.
        - Enter the actual supplier as the vendor.

- Enter the agency "Bill To."
- Attach the approved sole source document.

4. **Receiving Orders:** All agency orders for in-scope IT goods and services must received in eVA by the agency. The actual order for the goods or services is placed by VITA based on the request submitted by the agency using the procedures in paragraph 2 above. Receiving on the original request by the agency provides VITA with receipt confirmation so that receiving can be accomplished by VITA on the actual order to the vendor. It also provides information to allow VITA to properly time the initiation of billing to the agency, as appropriate

   - When VITA places the order, the AITR and the person who created the purchase request will be advised by an e-mail from the **eVA ORDERS** e-mail account that the order has been placed and the anticipated delivery lead time.
   - VITA places the agency purchase order number in the Attention section of the "Ship To" address to assist the agency in cross referencing the VITA purchase order number to the agency's original purchase order number.
   - If you cannot cross reference the purchase order number on packing slip documents from the vendor to the original agency number, e-mail **evaorders@vita.virginia.gov** advice on the appropriate agency order that matches the information received on the packing slip.
   - Once the goods or services are inspected and accepted, receiving in eVA should be accomplished by the agency receiver for the order.
   - Upon completion of the receipt in eVA, e-mail **evaorders@vita.virginia.gov** and advise that receiving is complete. Please note the vendor, EP#, PR#, items received and any other information relating to the receipt.

   - Northrop Grumman will issue a delivery ticket for service request. The ticket will reference the original agency purchase order number and will request this information be passed on to the agency receiver to complete the eVA receiving.

5. **Purchase requests status requests:** In-scope orders that are submitted with Virginia Information Technologies as the vendor will be placed with an actual vendor by either VITA or Northrop Grumman. The entity placing the order can be determined by checking the supplier contact on the original agency order.

   - If the contact is VITA, VITA will be process the order. To request status send an e-mail to **evaorders@vita.virginia.gov**.
   - If the contact is VITA(NG), the order will be s processed by NG. To request status send an e-mail to **vitapo@ngc.com**.

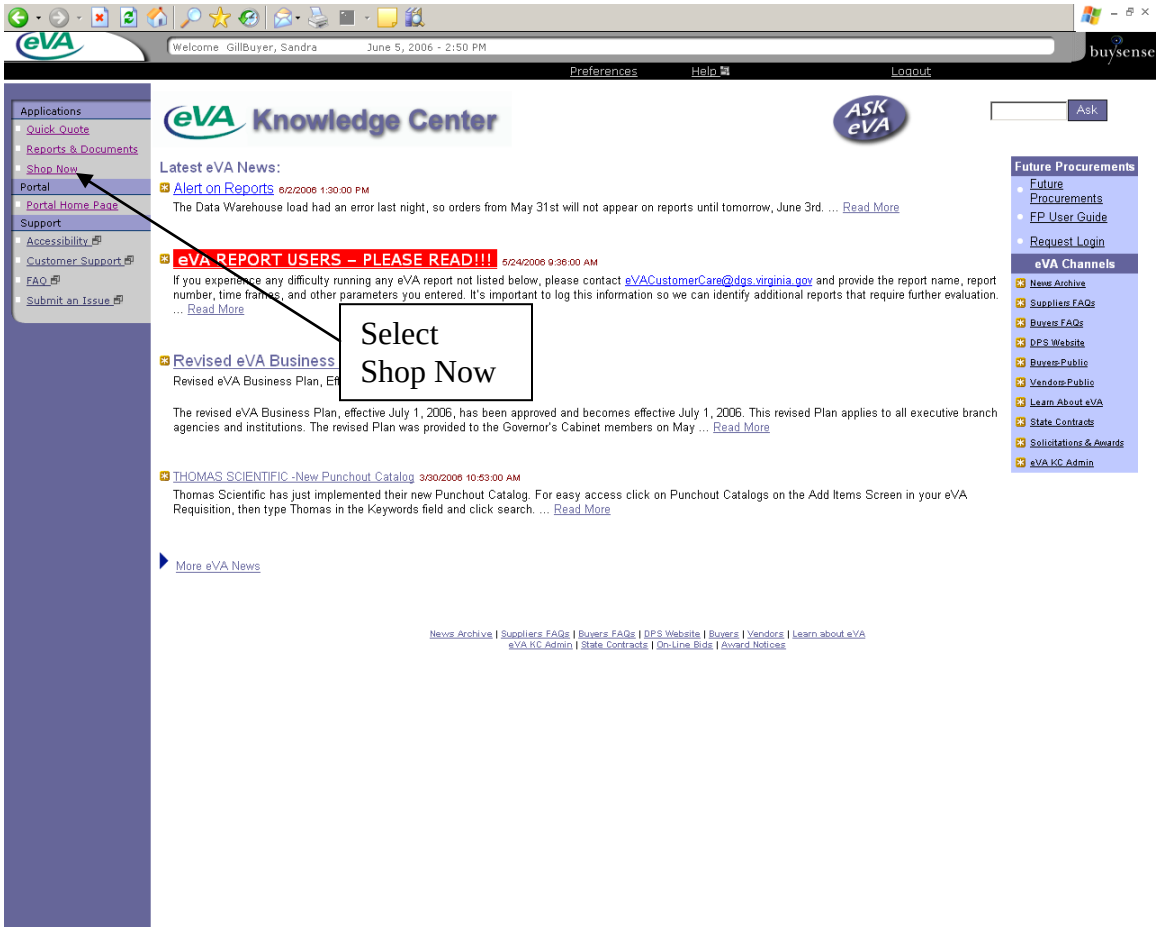
IT eVA Ordering Instructions with Screen Shots

The steps in the order creation process are displayed below and individual instructions are provided for each slide.

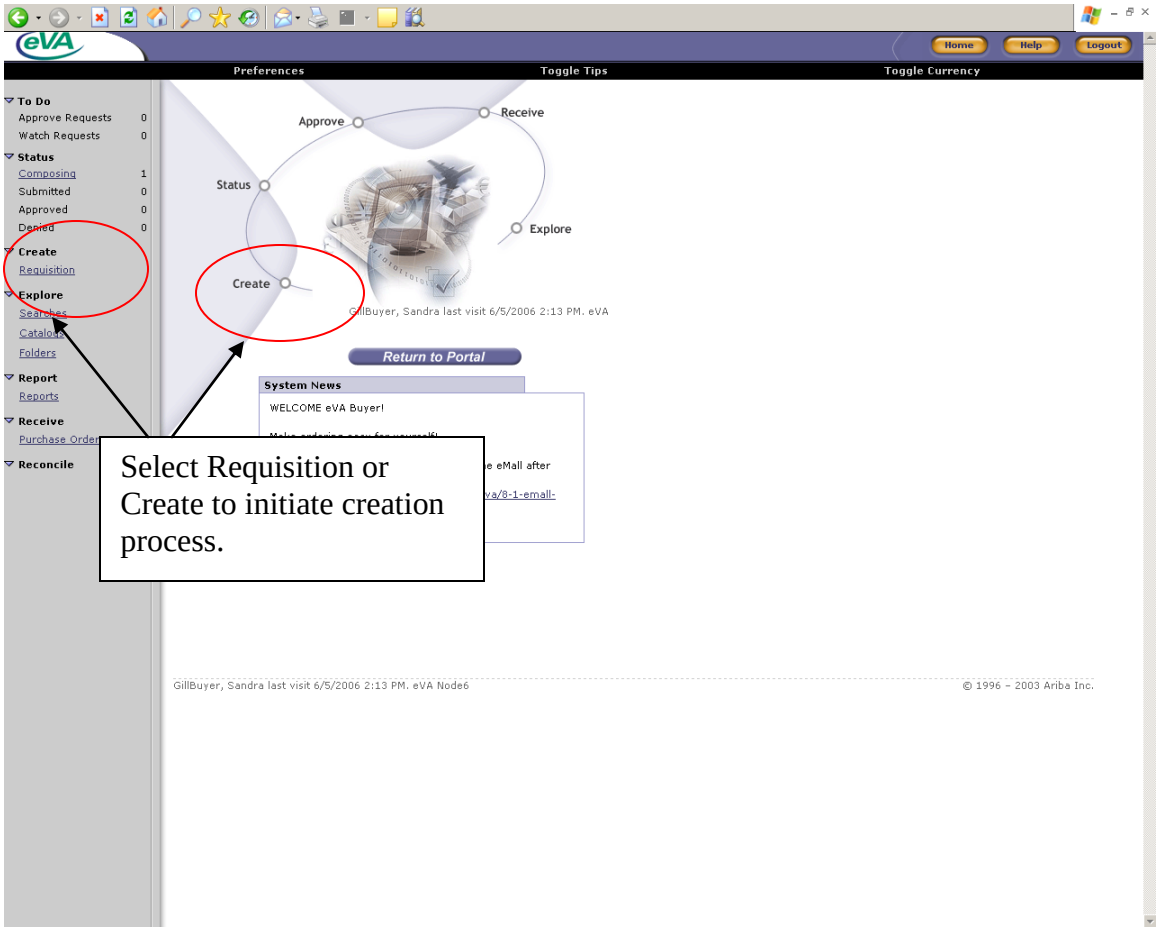
Requisition Creation:

- To login go to www.eva.virginia.gov

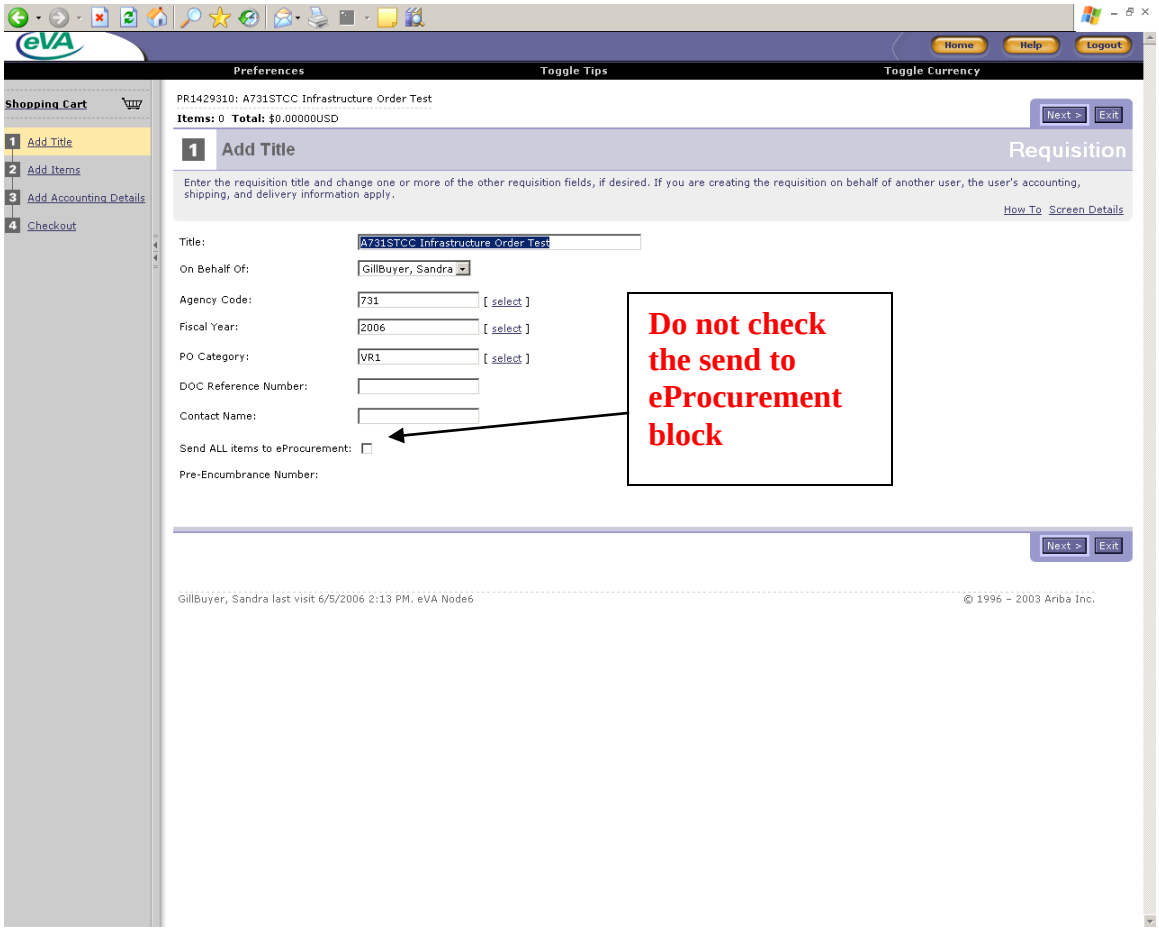
- Enter your assigned user name and password.
- Note the link below the login that is used to request your password be reset. Click on the button and follow the instructions for submission. You will be sent an e-mail with a computer generated password. Copy and paste this into the login screen and proceed.



- Click on Shop Now

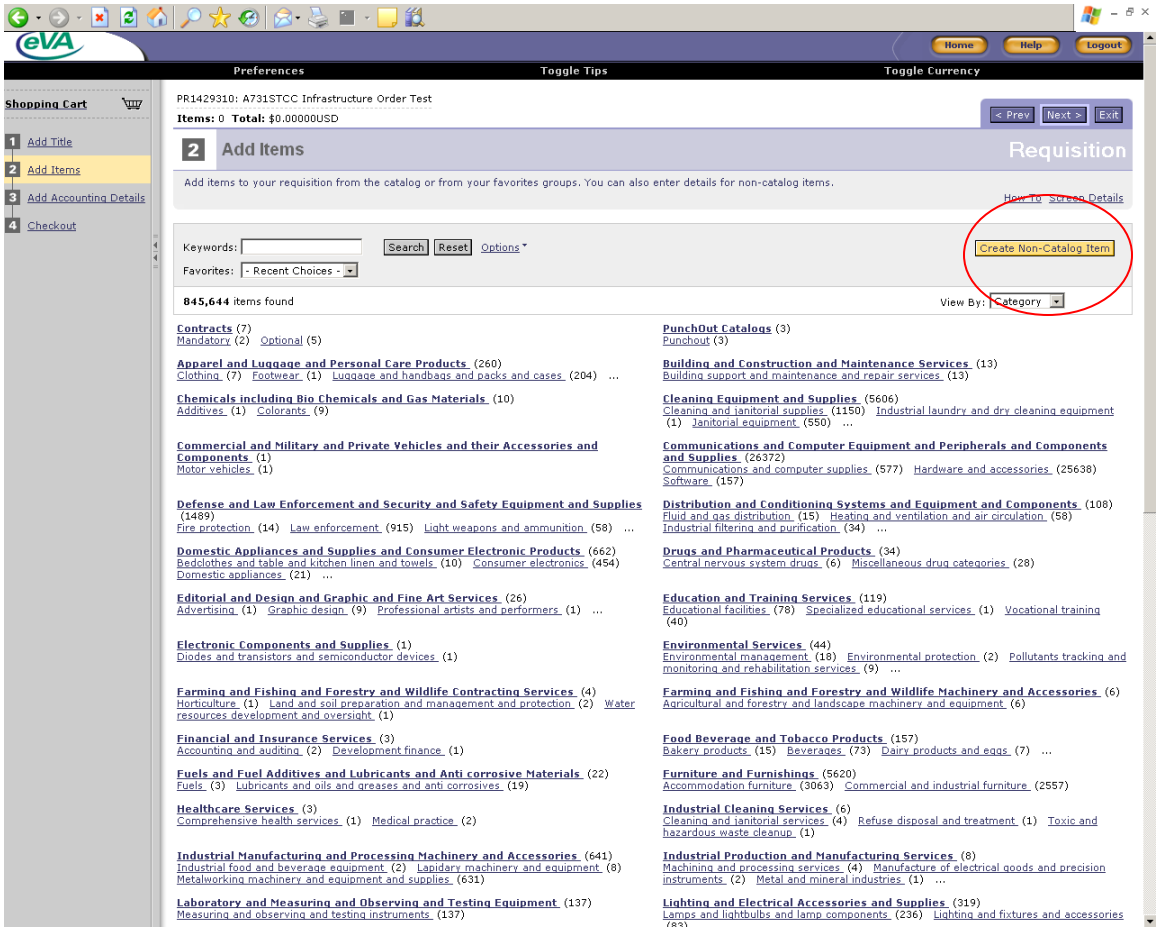


- Click on requisition to start the process or click on Create and then it will open to the choice of requisition and click requisition here. Either method works for starting the process.

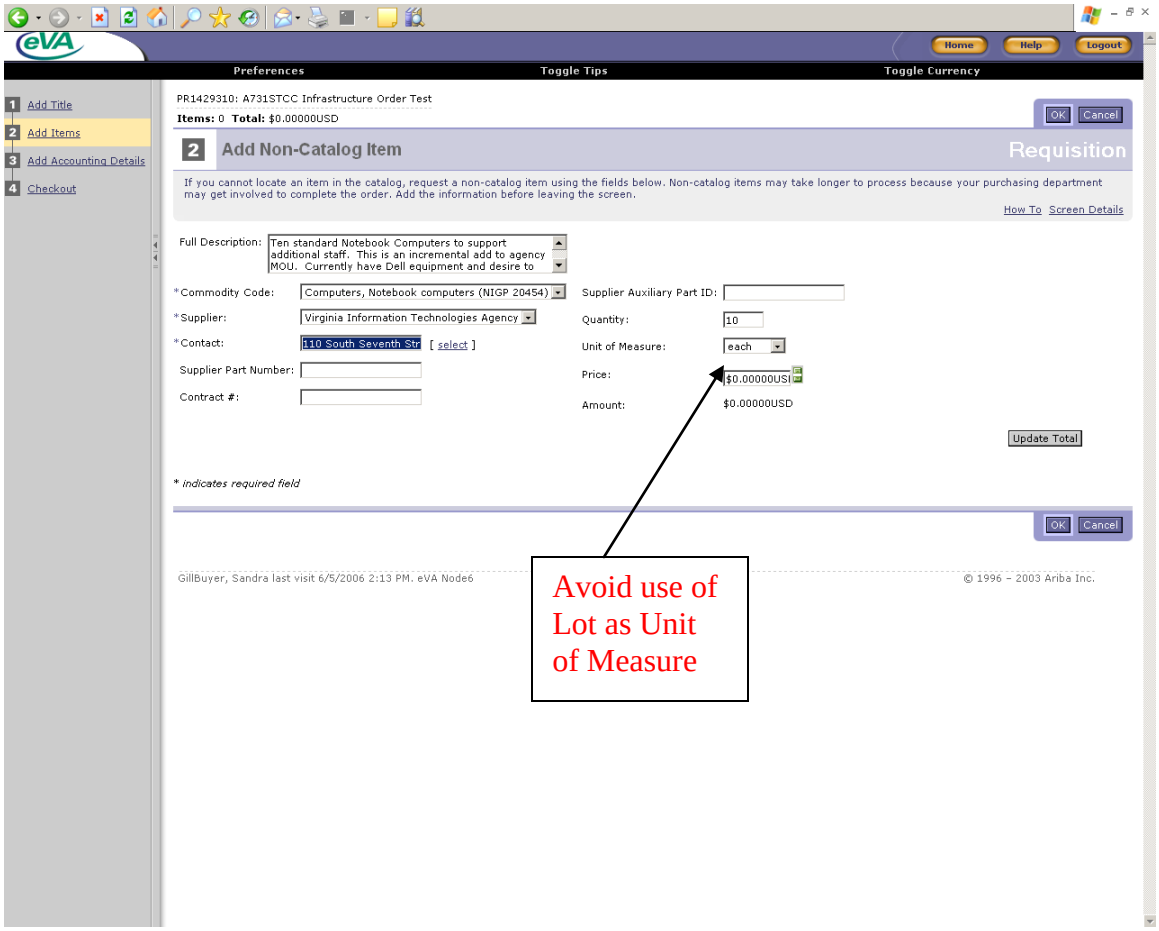


- At the Add Title screen, enter a title for the requisition that will allow you to locate the requisition from a list in your Status box when searching for a requisition..
- The use of pcards is not authorized for infrastructure orders. Remove the check from the Pcard box.
- Select "Vxx" PO Category. This will insert VITA approvals into the requisition workflow. In addition, the V code will insert an approval for the agency AITR to approve in eVA.
- **Do not check the Send to eProcurement block on the Add Title Screen above.**
- Click Next.
- **For VDOT, DEQ, TAX and DMV: At the above screen select the "On Behalf Of" user set up for your agencies use, then follow the remaining basic instruction in this instruction. For these agencies the "V" Code is defaulted for the selected On Behalf user and all items, regardless of dollar value will be routed to VITA.**

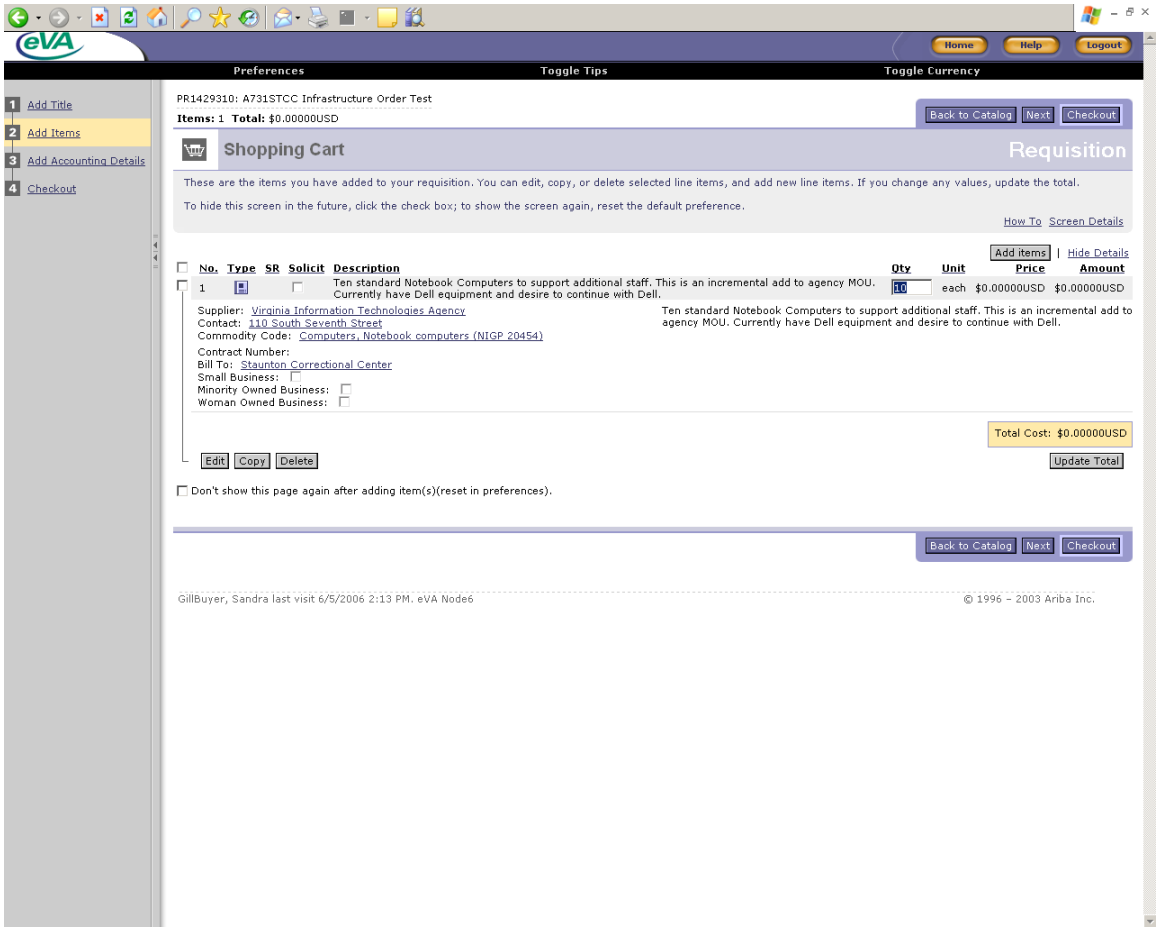
Orders for In-scope Goods and Services:



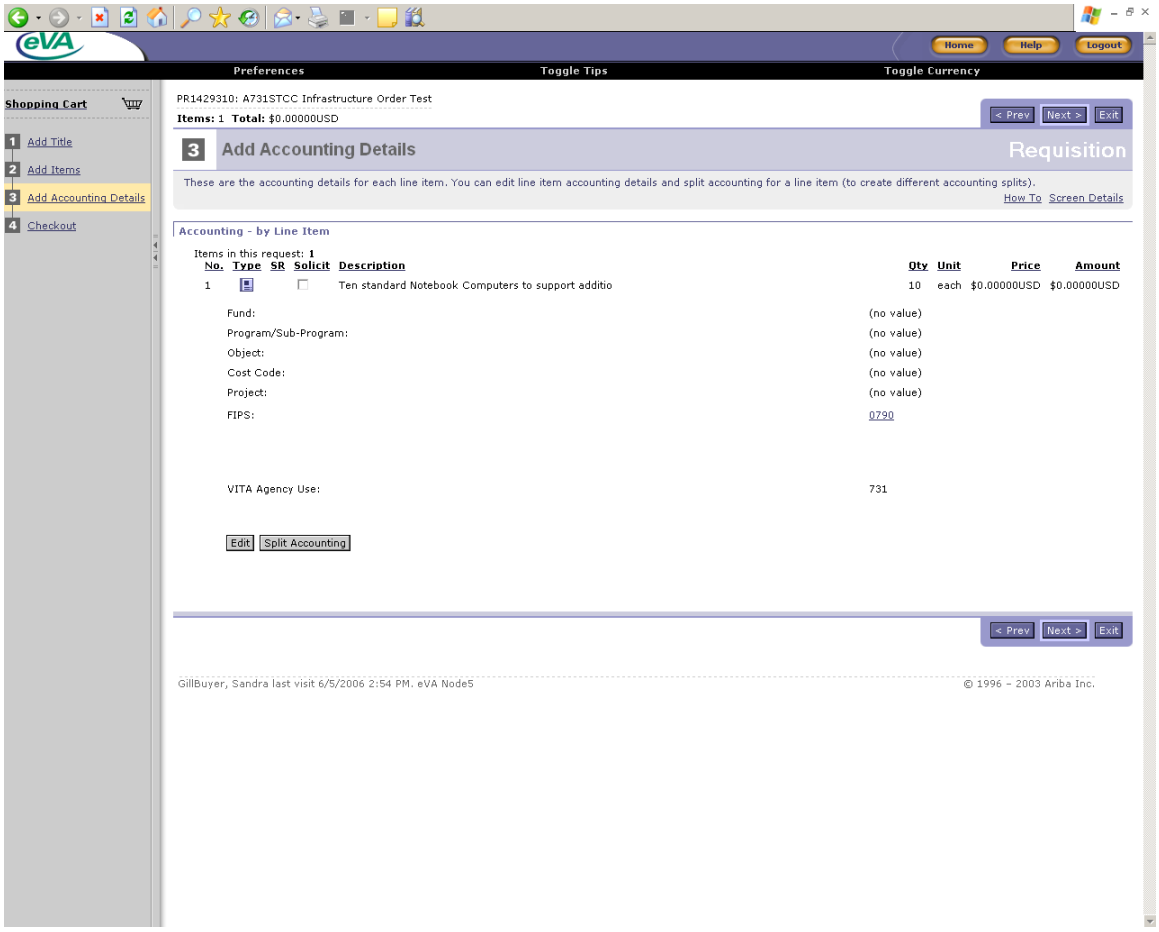
- All in-scope goods and services should be created as Non Catalog item.
- Do not put in-scope and not in-scope terms on the same requisition.
- Click on Create Non Catalog Items.



- Non-catalog item orders can be created and entered from this screen.
- Enter a full description. This field limited to 256 characters. Attachments can be added for lengthy descriptions or specifications. If you have a preferred model, vendor, etc., enter that information in the description, comments block or as an attachment.
- A commodity code must be entered. Click on the down arrow, search by word description.
- Click the down arrow for Supplier and select Other. In Search type in "Virginia Information%" and click Search. Select Virginia Information Technologies Agency – Infrastructure. The % sign is used as a wildcard in the search engine.
- Add any available supplier part number identification as appropriate.
- Enter the Contract number if there is an existing contract for the item
- Insert a quantity.
- Enter the price as zero. The actual price will be determined by VITA during the review process.
- Click on OK and the item will be added to your requisition.
- When complete, click OK to add the item to the shopping cart.

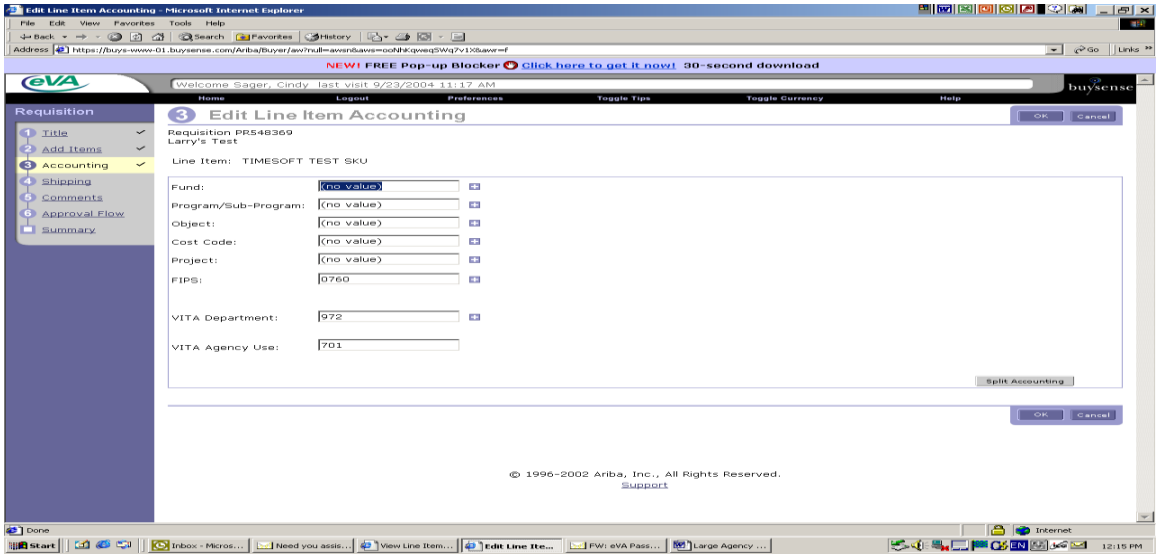


- Once the non-catalog screen was completed and saved, the above item was added to the requisition. Do not enter in-scope and not in-scope items on the same requisition.
- After adding all items, click Next.

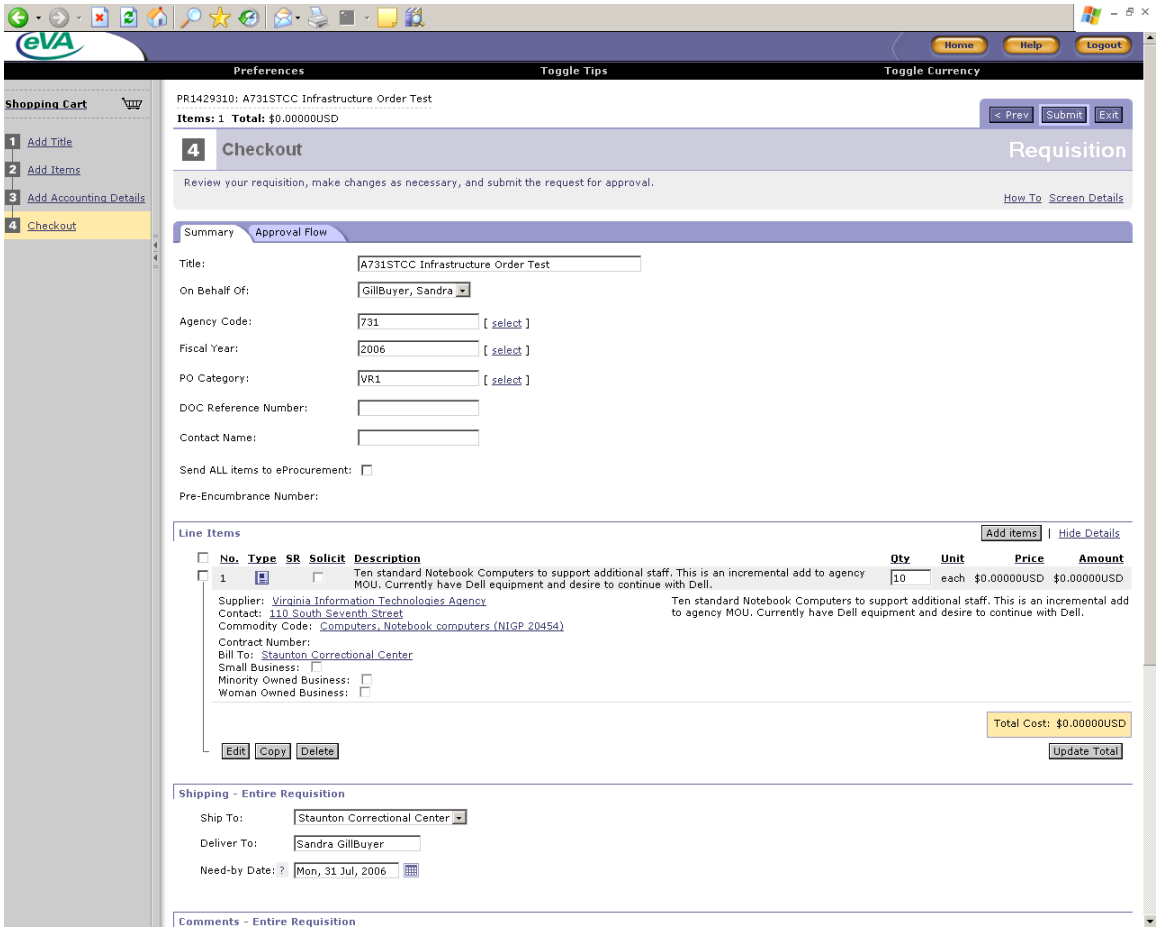


- The end user will verify or complete the agency accounting information for the agency budgetary unit paying for the equipment.
- The eVA system changes implemented for VITA adds additional fields for the required VITA accounting data. These fields have been defaulted for the agency and have been hidden from view except for the VITA Agency Use field for all agencies and the VITA Department field for agencies that purchase for more than one agency code.
- VITA Agency Use Field: This is a free form field for the use by the agency at its discretion. It is not a mandatory field and could be used by the agency to insert a unique code for reconciliation of the VITA monthly bill.
- Agency Ship To addresses can be accessed by clicking the down arrow by the Ship To field. Select the appropriate address.
- Click Next to proceed.

Accounting Data Example For Agency That Creates Orders For Multiple Agencies:

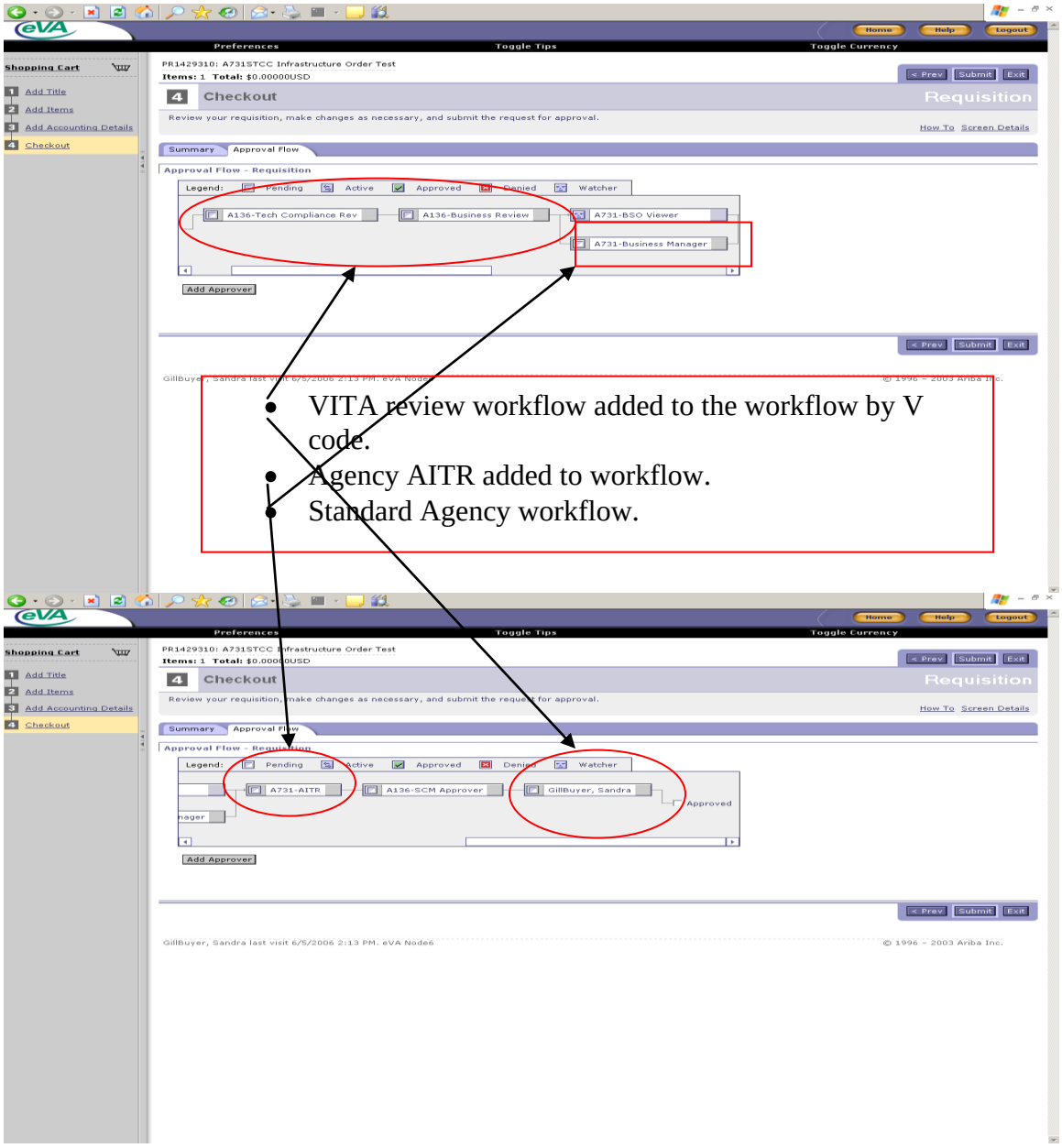


- This example is from the Department of Corrections. This agency buys for multiple agencies and selects the appropriate agency from the Entity Code drop down box on the Add Title screen.
- As can be seen from the screen above, the VITA Department field is shown with a value in the field. This is the VITA Department code for the default agency code on the Add Title page.
- If you change the default value for the Entity Code, it does not automatically change the default value for the VITA Department. It does filter the VITA Department code and only allows you to add the proper code through the select box (+).
- If the default Entity Code is edited on the Add Title screen and the VITA Department is not manually edited on the Edit Accounting screen, the transaction will be rejected when it is submitted and you must go back and change the VITA Department code.
- **IMPORTANT:** The requirement to edit the VITA Department when you change the default Entity code applies to all transaction, not just in-scope "Vxx" coded transactions.



- At Checkout do a final review and edit of the transaction as required.
- Immediately below the section of the Checkout page show above there is a comments box and the as well as the capability to add attachments.
- It is suggested that you click on the Approval Flow box and see who will be required to approve this requisition.

Approval flow for In-scope order on two screens:



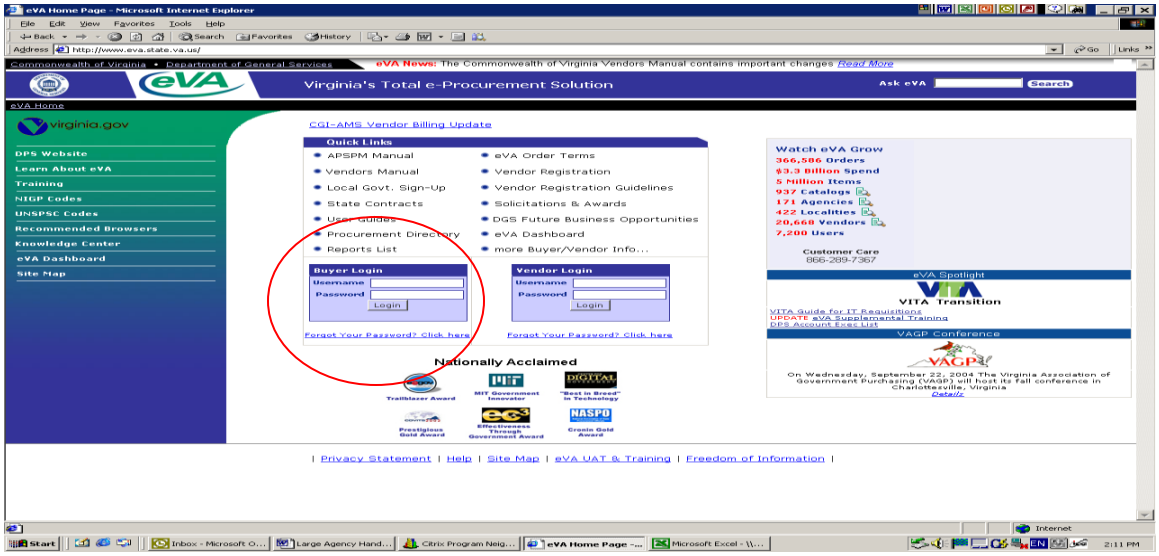
- This is a picture of the workflow created for this requisition and should be reviewed before submission of the order.
- The approvers in ovals are the IT approvers added to the workflow by selection of the "Vxx" PO Category.
- The approvals in the rectangle are the standard approval flow for this agency.
- Click Submit to start the requisition in the workflow. Upon completion of the final approval, the order will be sent electronically to the vendor.

PO Printing Requirement: Approval flow for non-registered eVA vendor or registered vendor that is not signed up for receiving electronic orders

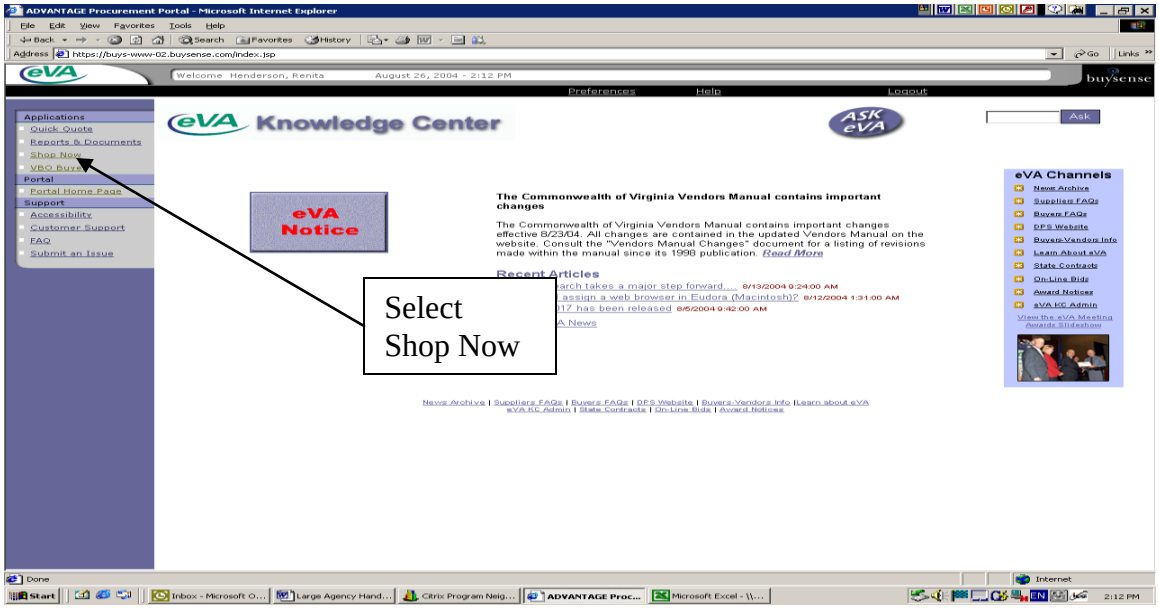
- The last role in the above workflow is for PO Print. This role is used to inform you that this is not an electronic enabled vendor and that you must print the order and send it to the vendor.
- At this stage you are just seeing what the workflow indicates will happen. After you submit the requisition it will go through the approval process and return to the person defined for this approval.
- The PO Print approver must approve the order and then wait for the requisition status to change to Ordered (approximately 15 minutes). When the status has changed to Ordered, go in and open the order (EPxxx) and print and fax/mail to the vendor.

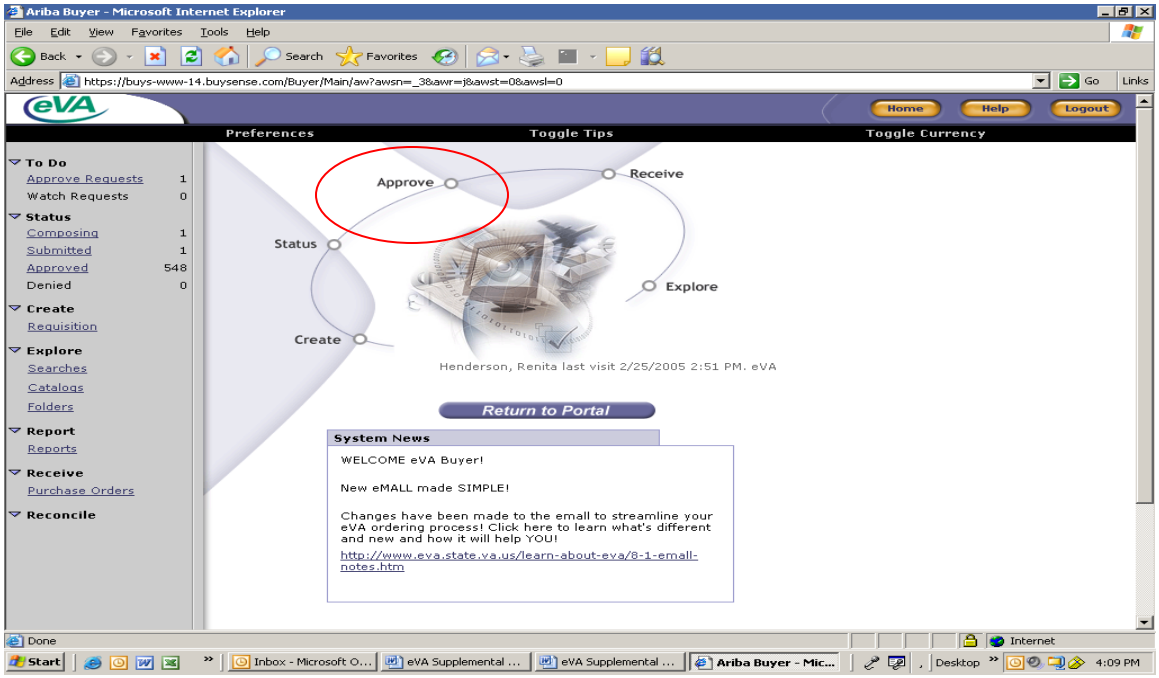
Approval Process:

To login go to www.eva.state.va.us

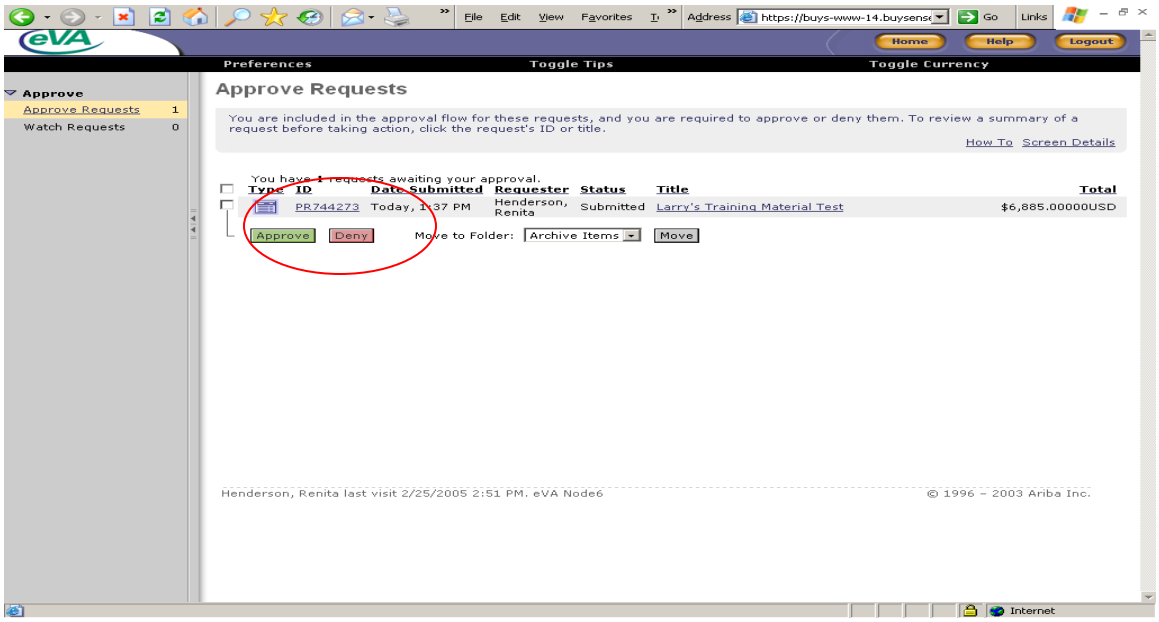


- Enter your assigned user name and password.

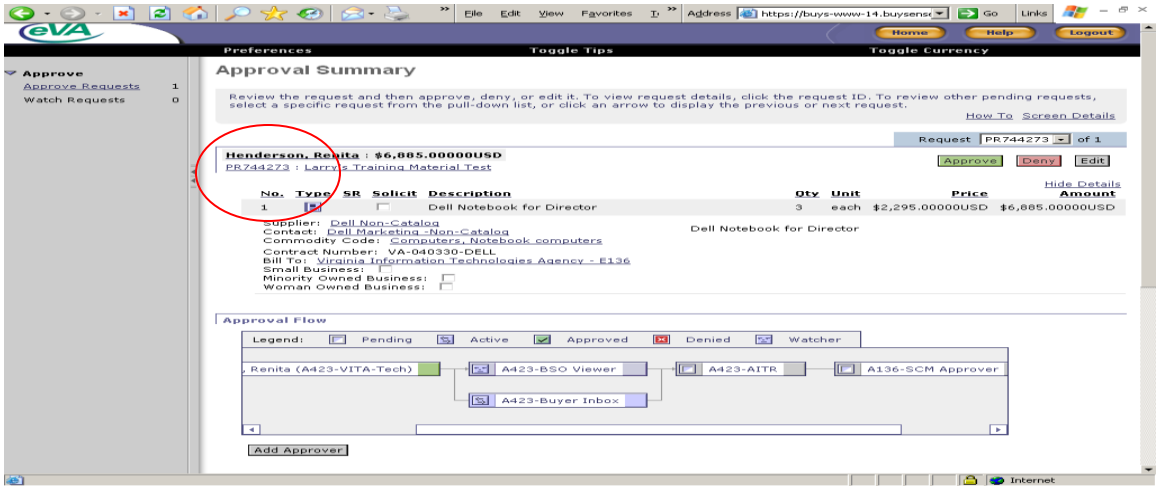




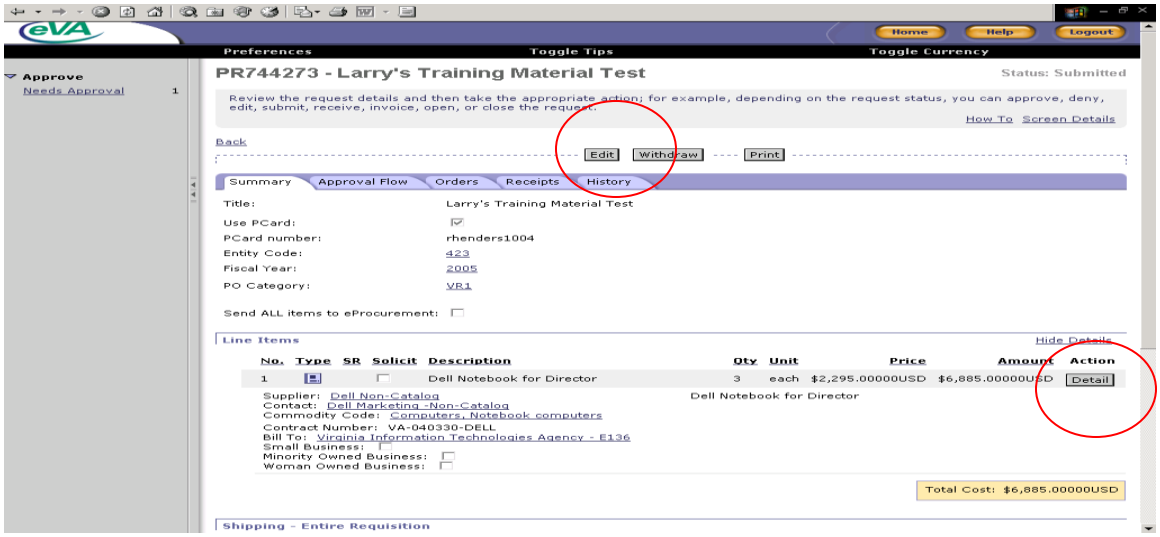
- In this instance there is only one requisition for approval as shown under the To Do heading.
- Click the Approve button to open the approval in box.



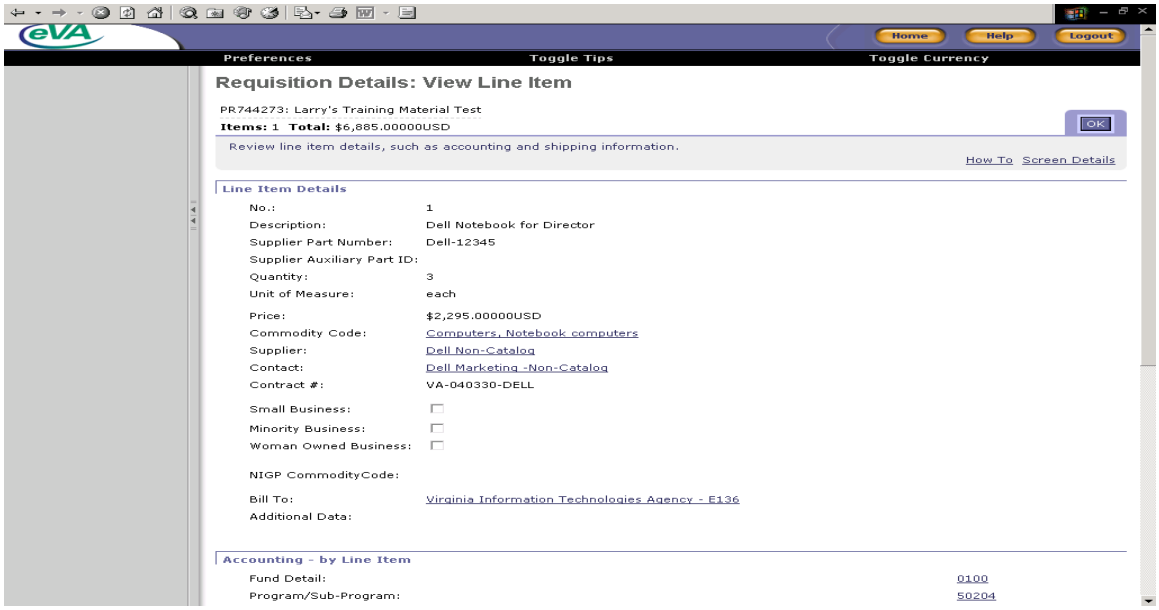
- The requisition could be approved from here. However, this should not be done since the requisition detail has not been reviewed.
- Click on the PR number to open the requisition for review.

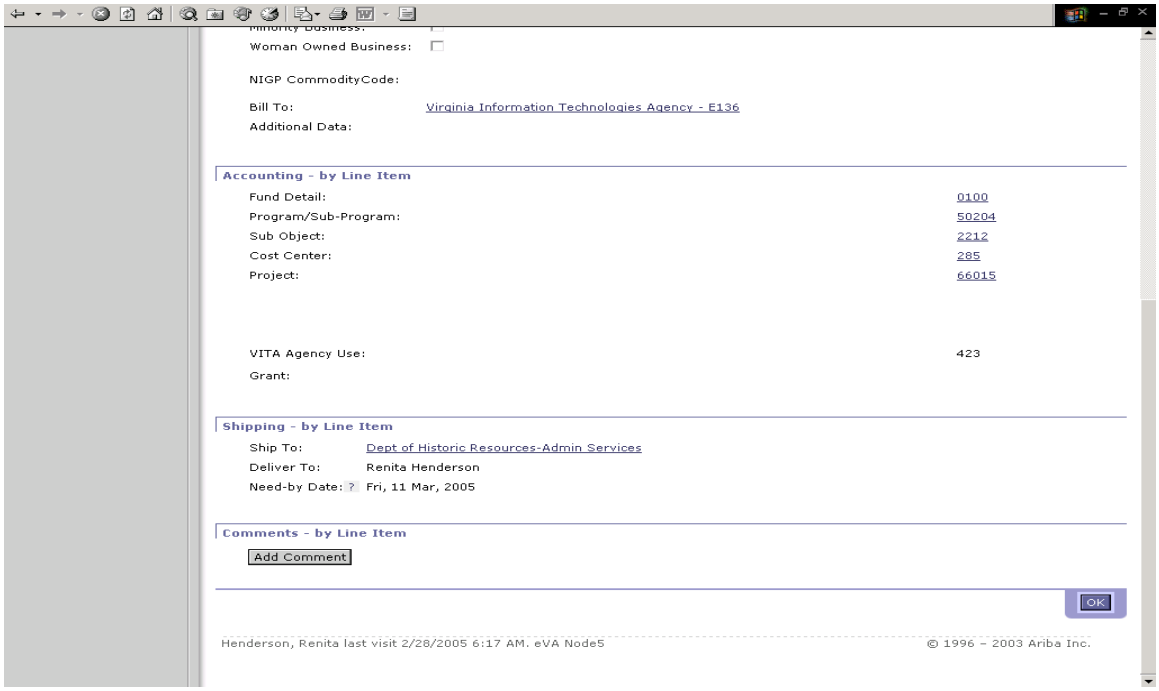


- At this screen you can review each line item on the requisition.
- In addition, you are shown the workflow for this requisition.
- Click on the requisition number to open the requisition for additional review.



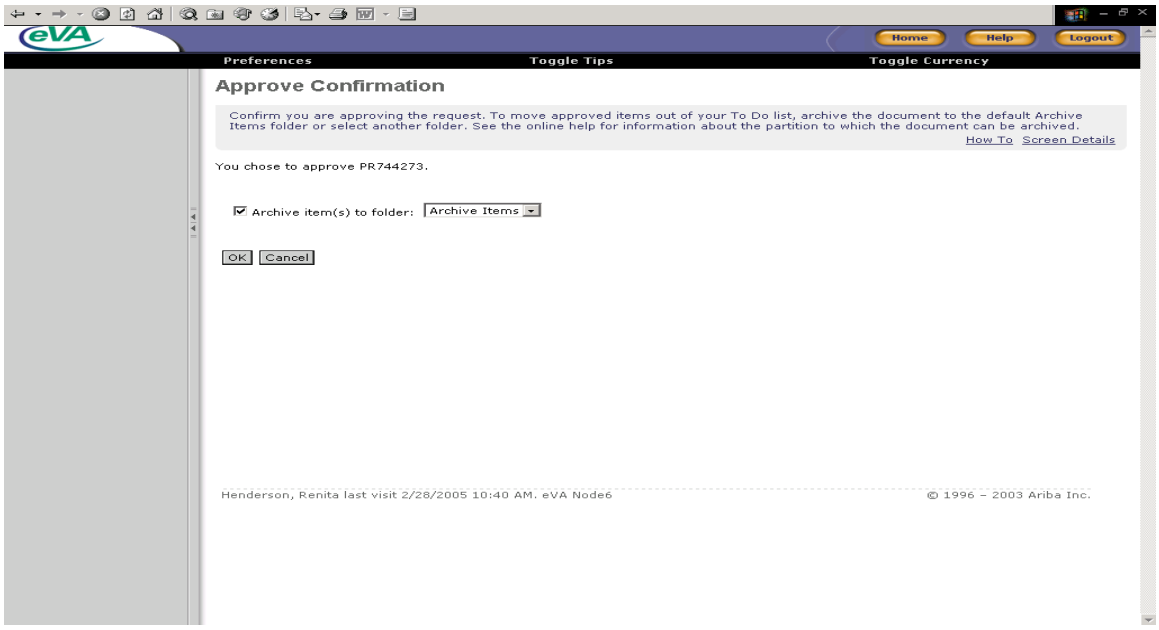
- You must click Edit if you need to change the requisition. You can edit only if you have been given Edit Approval authority in your eVA personal user profile.
- Verify that the Pcard block has been unchecked. Edit and remove if it has been checked.
- Verify that a "V" PO Category has been selected. Edit and change if the "V" code has not been selected.
- **Verify that the eProcurement block is not checked. Edit and remove if it is checked.**
- Verify the technical details of the order and edit as appropriate.
- Changes to the requisition will start the approval process over.
- Click on Detail to review the remainder of the requisition.





- Review and edit as appropriate.

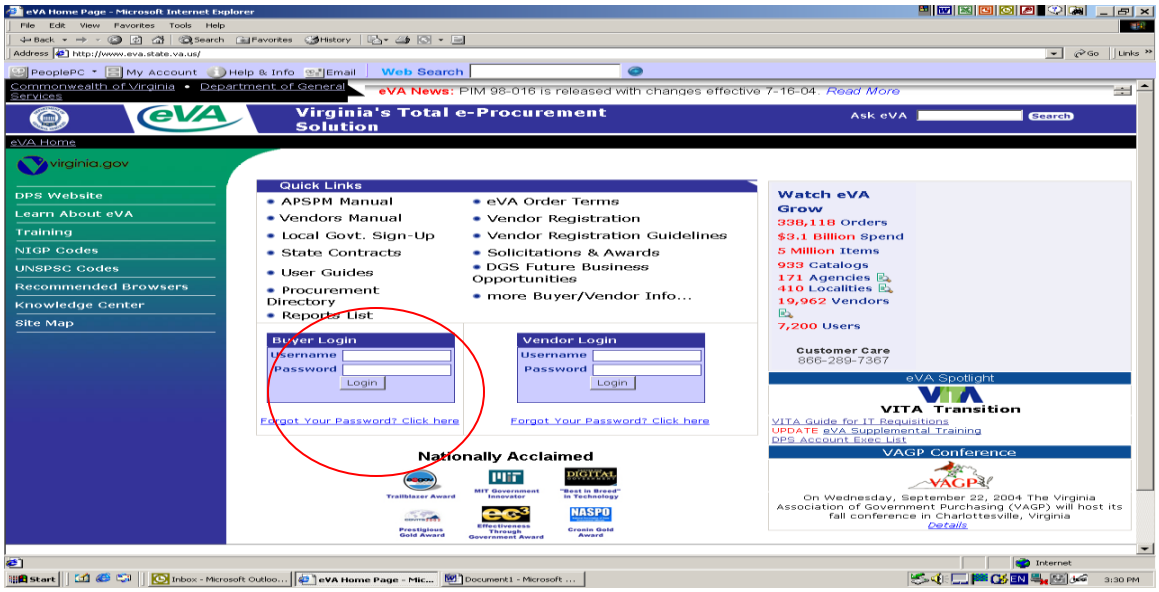
- When an edited requisition is saved, the above message will appear indicating that the workflow will re-fire because of the edit of the requisition. Since the requisition has changed it is appropriate that previous approvers review and approve again. (This example is assumed to be the edit of the Tech Configuration approver.)
- Click the Save button again and the requisition will go back into the approval workflow.



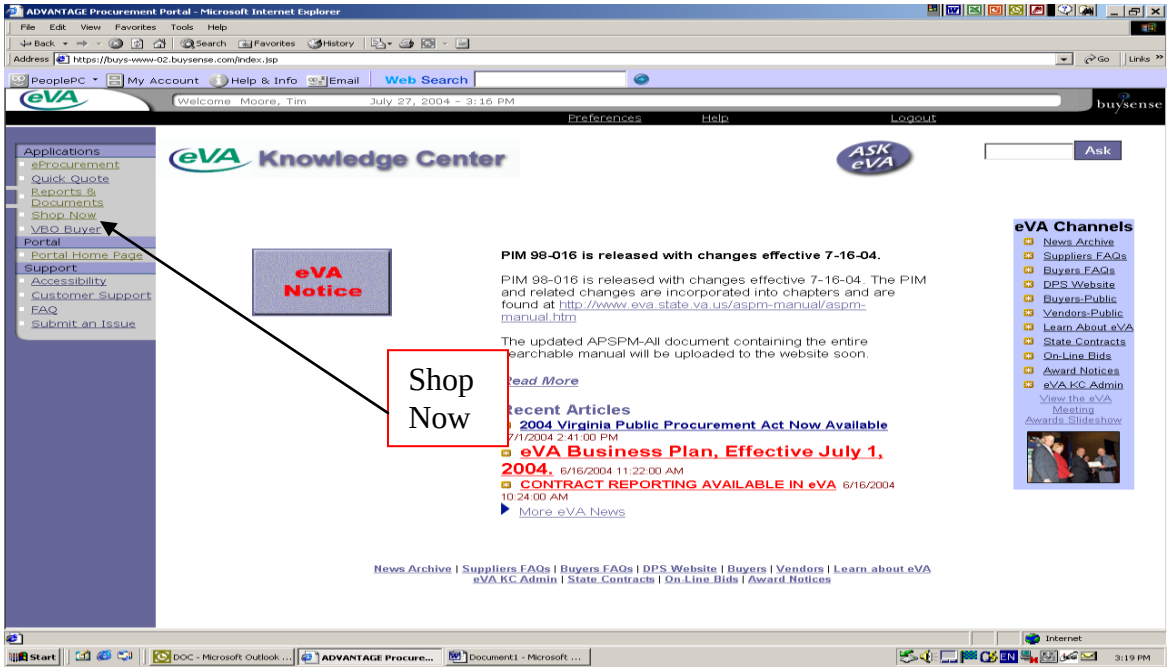
- Click OK to confirm approval.

Receiving Orders

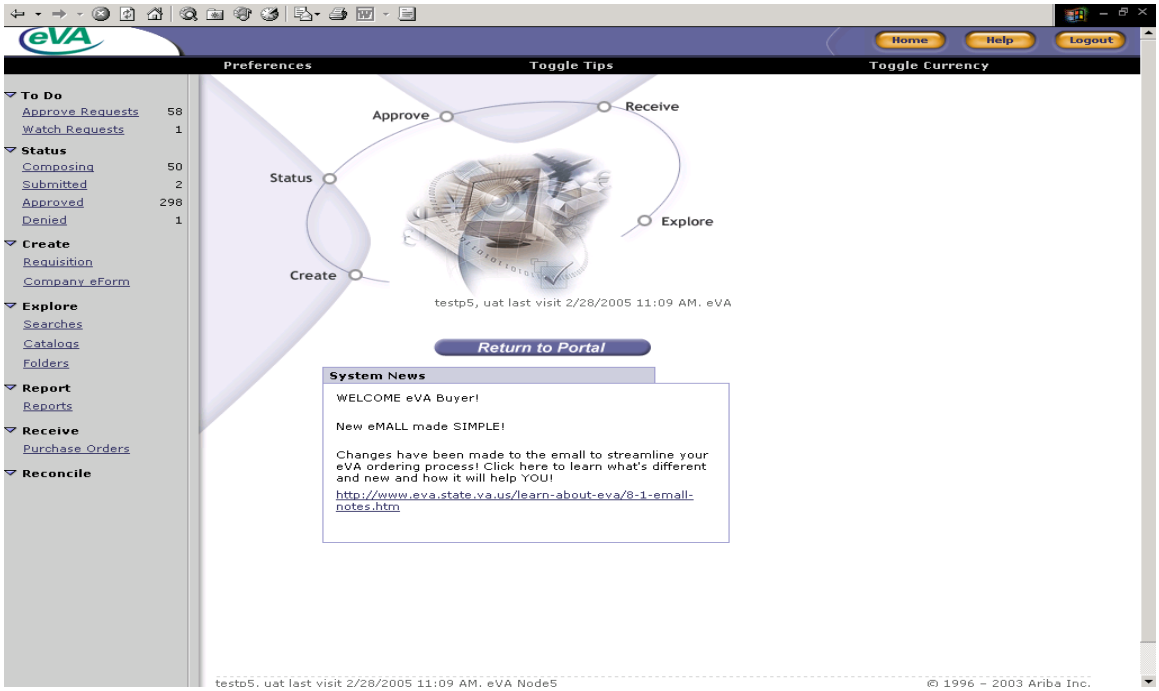
Infrastructure Goods and Services: Receiving for all IT infrastructure goods and services orders must be accomplished in eVA. When an order reaches the Ordered status, a receiving document is created and placed in the receiving in-box of the person designated to do the receiving. If the agency is set up for Desktop Receiving the shell will be available to the person who initiated the order. If the agency is set up for Central Receiving, the receiving must be done by the person or persons given the receiving role. Non-infrastructure IT Goods and Services: These services will be ordered from a commercial supplier and Billed To the agency. Therefore, VITA does not require receiving in eVA for these items.



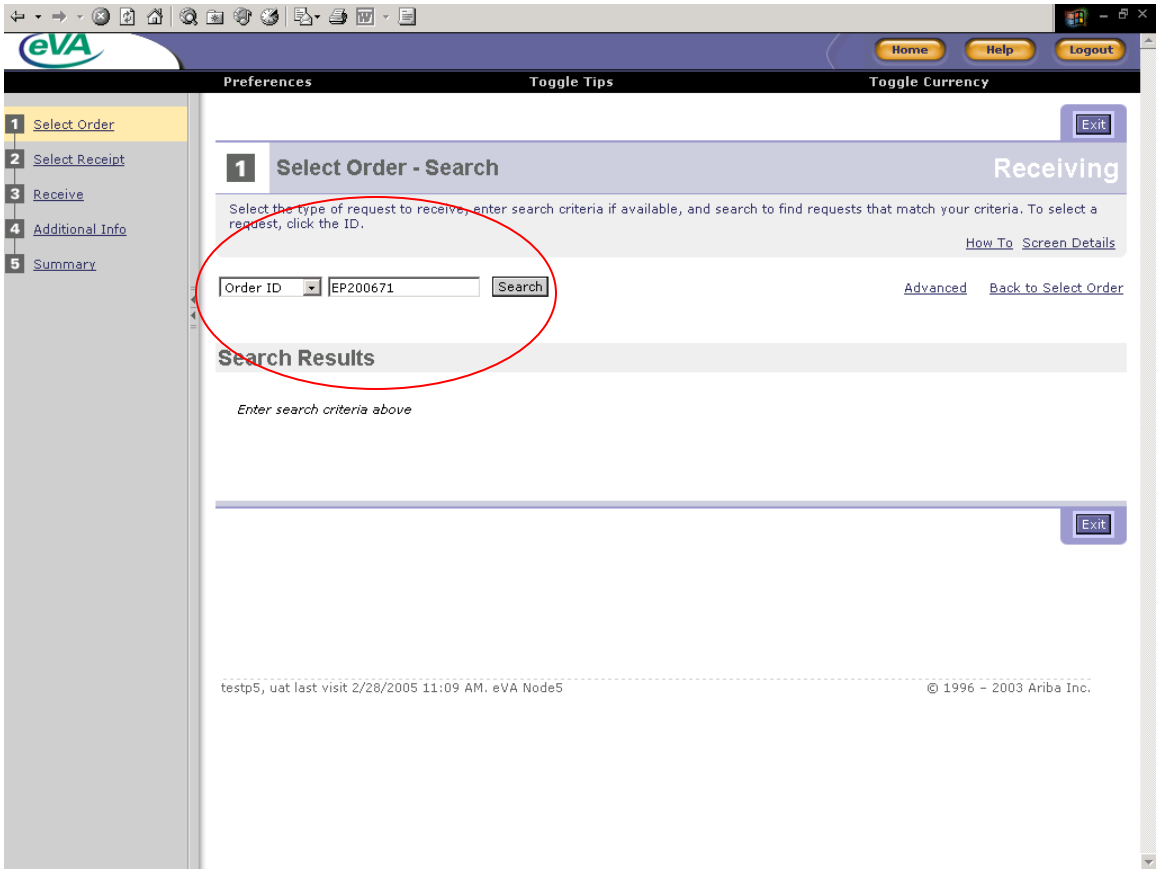
- Go to www.virginia.gov
- Enter your Userid and password and click login.
- Do not allow Windows to save your password.
- Answer "yes" to the question about going to a secure site.



- At this screen click Shop Now on the left navigation bar.



- Click on the Receive button.


eVA
Home
Help
Logout
Preferences
Toggle Tips
Toggle Currency
1 Select Order
2 Select Receipt
3 Receive
4 Additional Info
5 Summary
Exit
1 Select Order - Search
Receiving
Select the type of request to receive, enter search criteria if available, and search to find requests that match your criteria. To select a request, click the ID.
How To
Screen Details
Order ID
EP200671
Search
Advanced
Back to Select Order
Search Results
Enter search criteria above
Exit
testp5, uat last visit 2/28/2005 11:09 AM. eVA Node5
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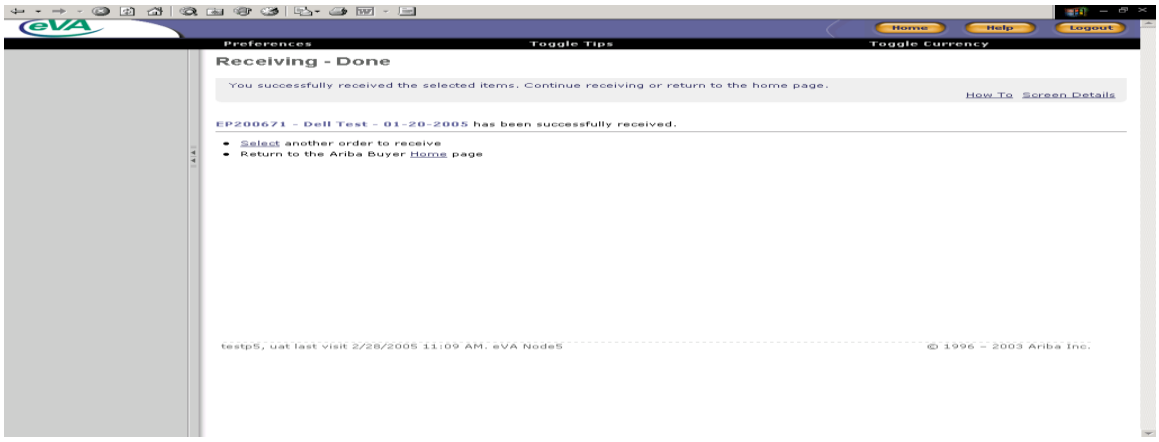
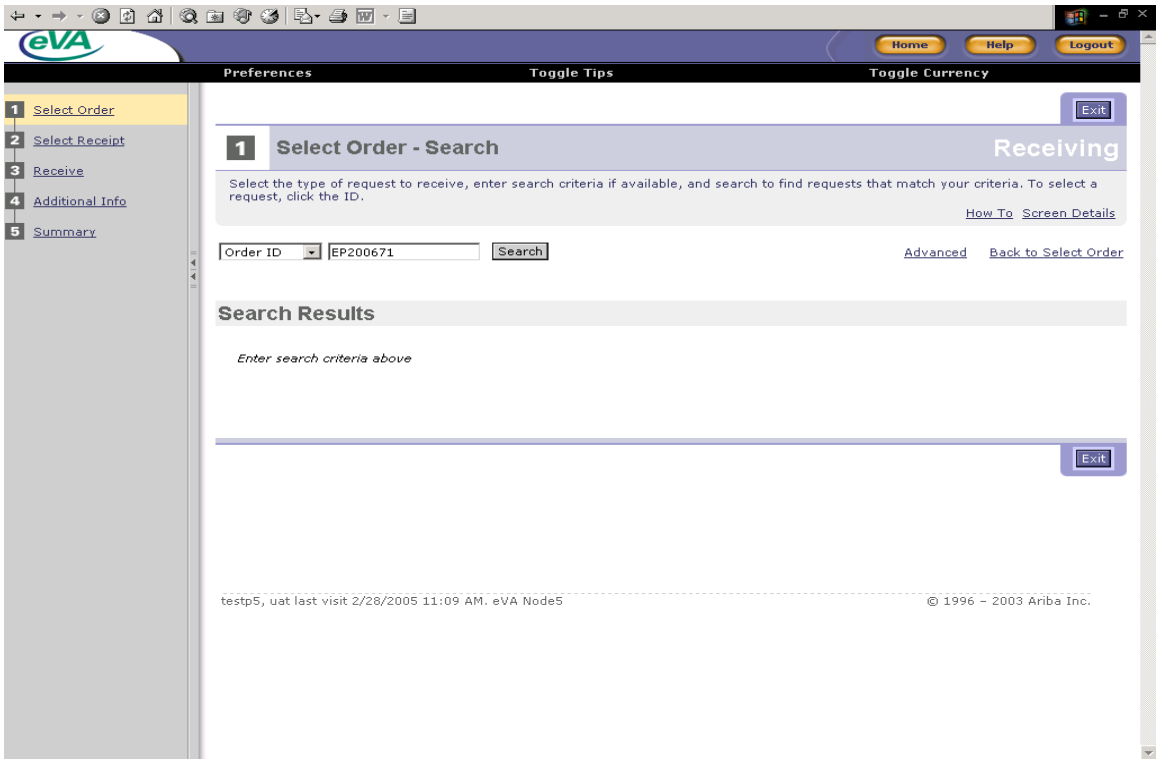
- Enter the order number (EP) that you wish to receive and click search.

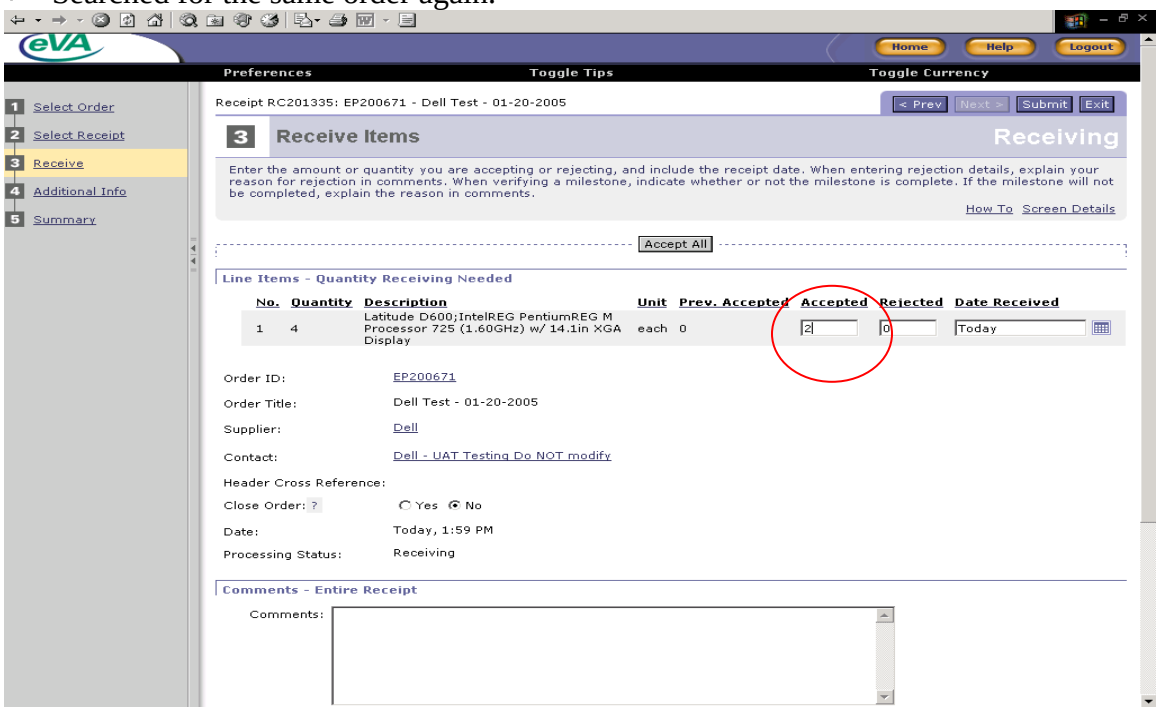
- The receiving document will open.
- If the entire order has been received, you can click "Accept All" at the top or you can type in the quantity received in the Accepted box.
- If you are receiving/accepting less than the full order quantity, type in the actual quantity received.
- The Date Received is defaulted to the current date. This date should be changed to reflect the actual date received by clicking on the calendar and selecting the received date.
- Note that the default on the Close Order is "No." If you do a partial receipt by entering a quantity of less than the quantity ordered or not receiving all lines, the system will create another receipt document for the remaining quantity and put it in the Receive folder.
- If you receive less than the full quantity and the remaining items will not be provided by the vendor, Close Order should be changed to "Yes." In this circumstance the system will not create another receiving document.
- After completing all entries, click the Submit button at the bottom of the screen.



- In the previous receipt, two of the four items were received.
- Clicked on return to Home.
- Click on Receive again.

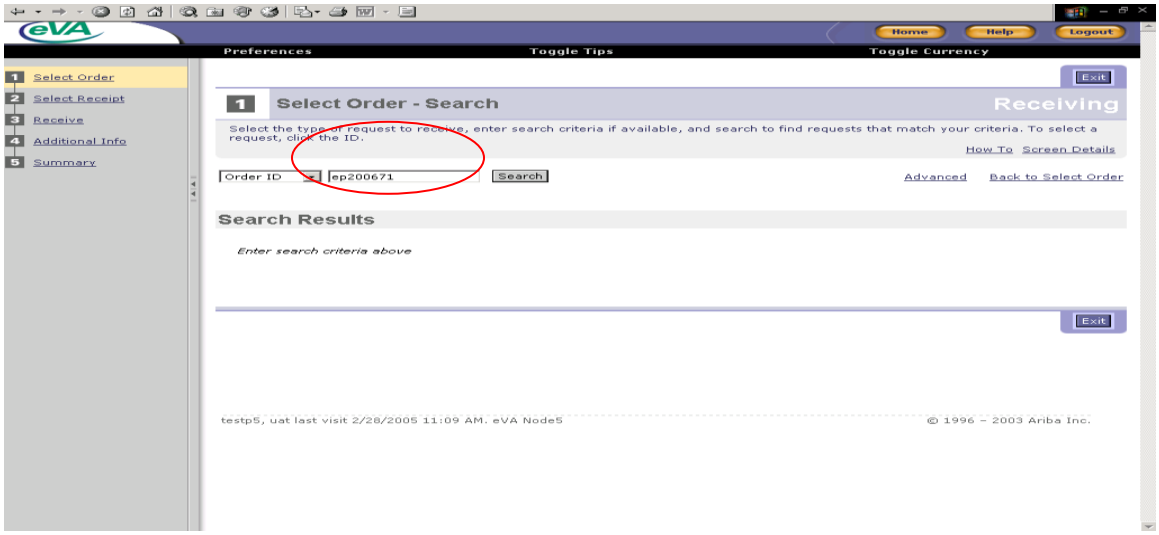


- Searched for the same order again.

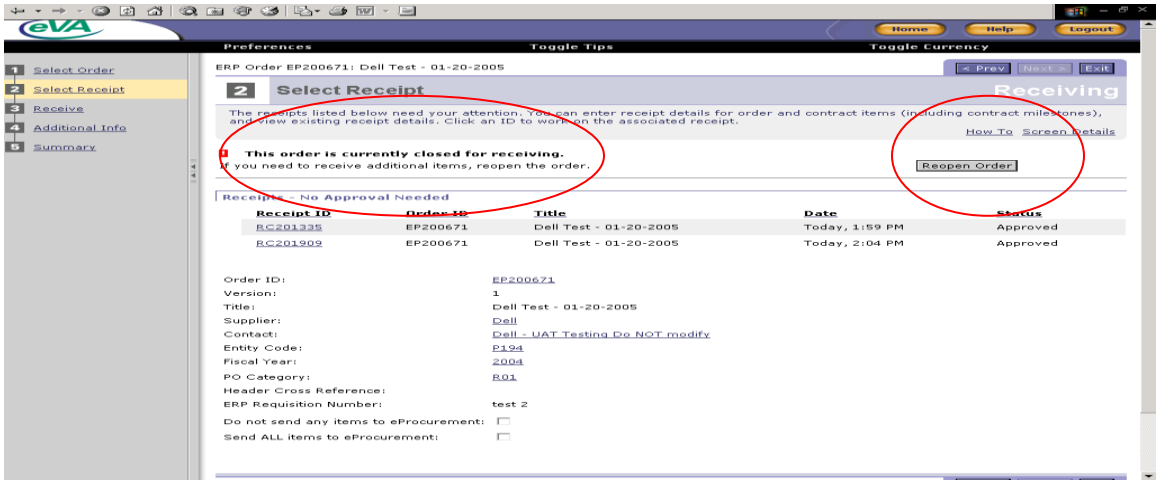


- Note that a new shell is found with a quantity of two previously received.
- An additional quantity is received.

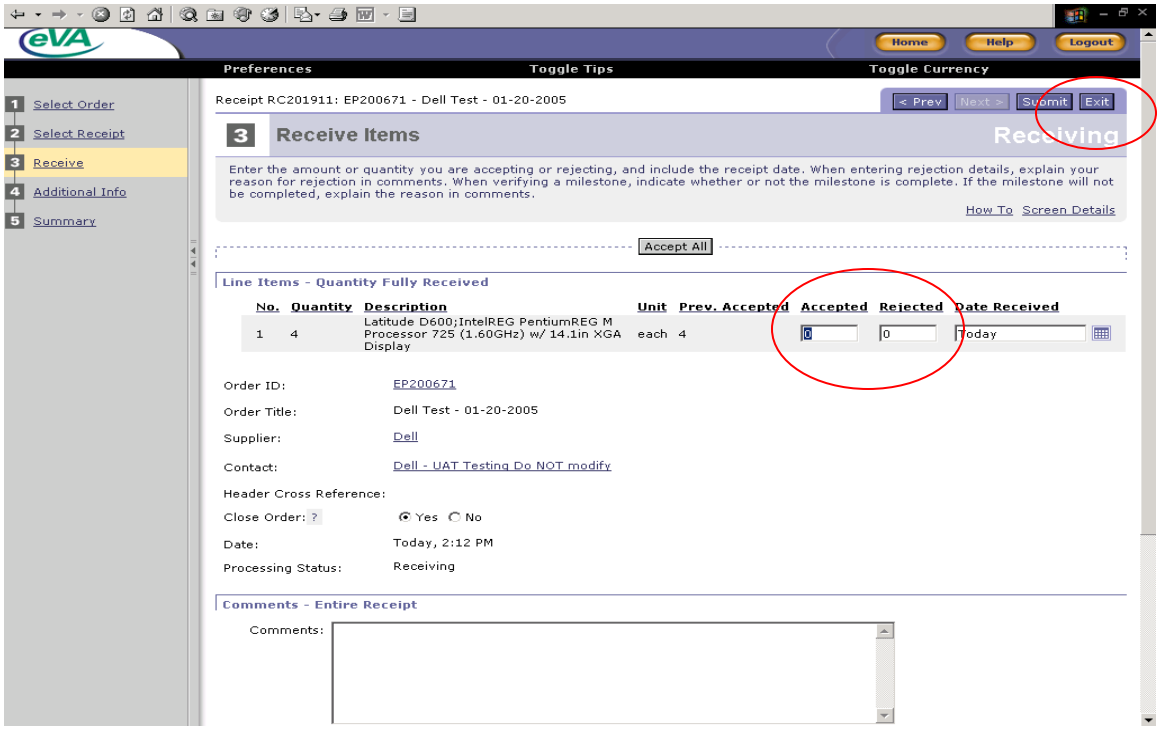
Re-open Order for Receiving to Create a Change Order: An order that has been fully received or has been closed for receiving must be re-opened for receiving before a change order can be created.



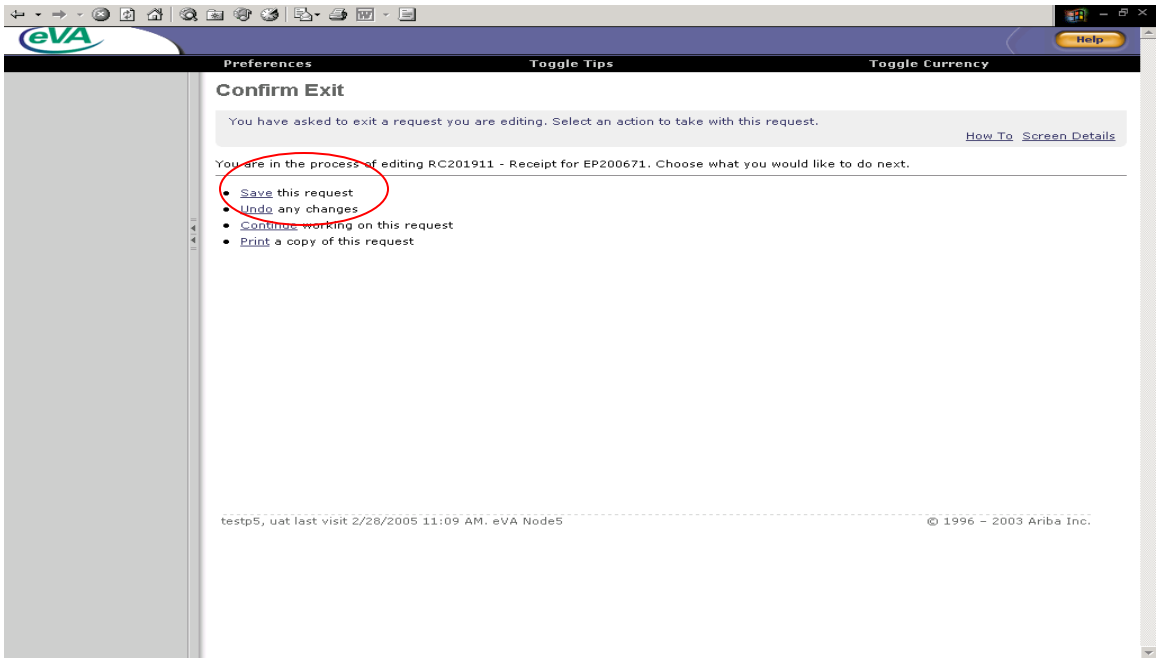
- In the previous steps we created two receipts for EP200671 to fully receive the order.
- There may be occasions when you need to re-open a closed order for additional receiving or you need to do a change order to add additional items to the original order.
- An order that has receiving closed can't be changed without re opening for receiving.
- To reopen, go to Shop Now, Click the Receive button, enter the order number and click on Search.



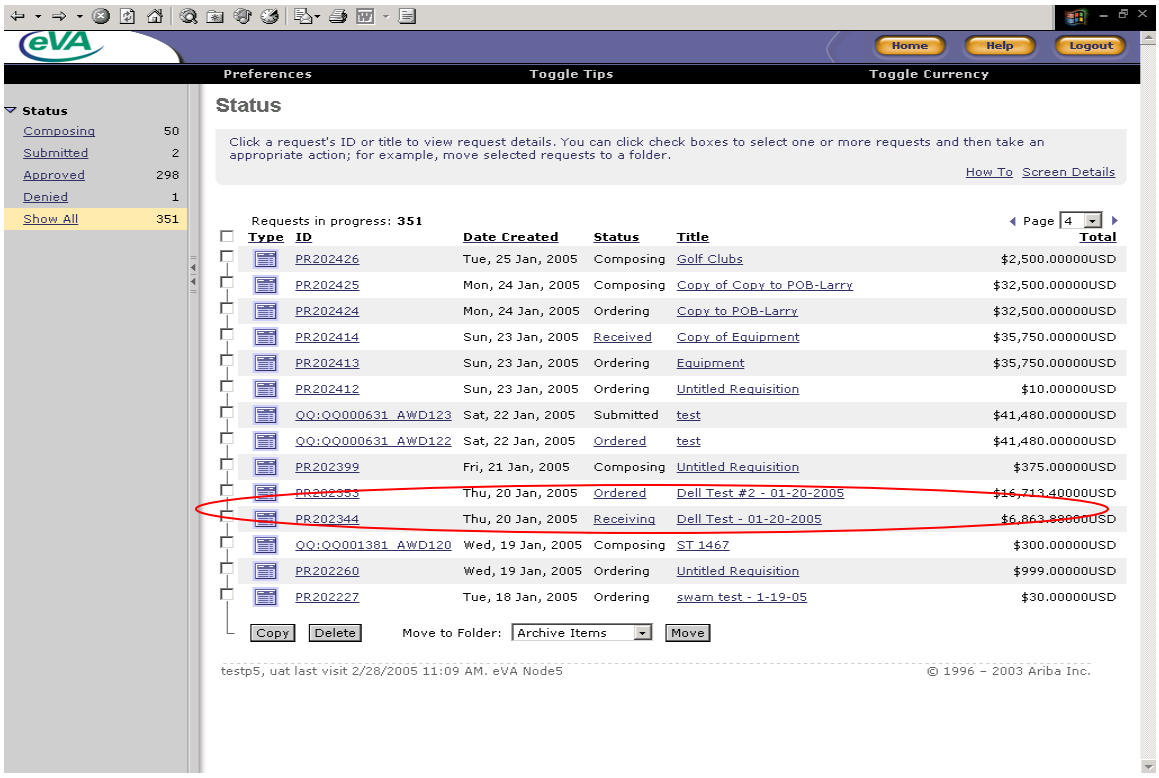
- Note that the order is closed to receiving.
- Click on the Reopen Order button.



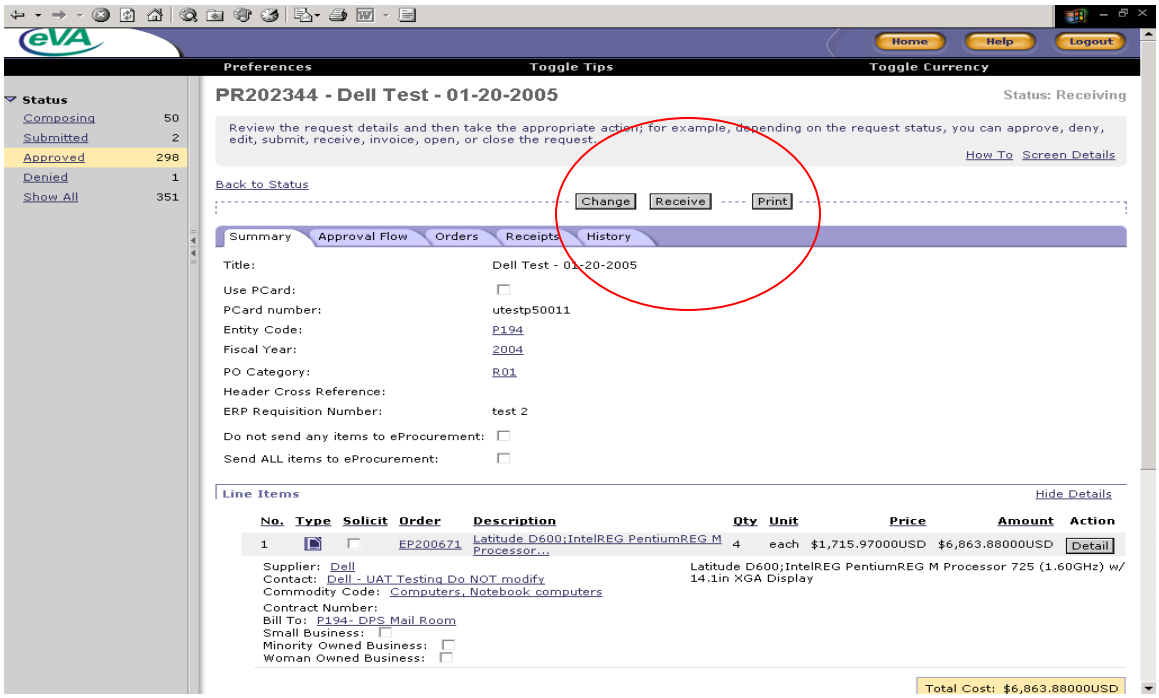
- The system opens a new receipt for additional receiving showing the ordered quantity fully received.
- Click Exit.



- Click the Save button to save the receipt for subsequent receiving.
- Return to the Home page.
- Click on Status.



- Note that the order is now back in a receiving status.
- Click on PR202344.



- Note that the order now has the Change Order button.
- Click Change to do a Change Order.
- You may now add items and you can make some edits to the fully received item. However, you cannot delete the fully received item nor can you delete the item.