



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

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General Guidance

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

https://www.vita.virginia.gov/media/vitavirginiagov/supply-chain/pdf/IT_Goods_Services_Commodity_Codes.pdf

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

(Note: VITA has statutory authority to promulgate regulations to ensure that all procurements of information technology of every description meet the electronic and information technology accessibility standards of the Rehabilitation Act of 1973 (29 U.S.C. §794d), as amended.

Therefore, any procurement for IT goods or services exceeding \$100K should be v-coded in eVA.)

A summary of VITA’s procurement delegation can be found at

<https://www.vita.virginia.gov/supply-chain/scm-policies-forms/summary-of-vitas-procurement-delegation/>

For a copy of the VITA Hardware Standards go to the following site:

<https://www.vita.virginia.gov/services/>

The IT Consumables list is a listing of in-scope IT goods and services that have been delegated to the agency for procurement up to \$100,000. These goods can be procured by the agency without coming through VITA. The IT Consumables list can be found at the following link:

https://www.vita.virginia.gov/media/vitavirginiagov/supply-chain/pdf/VITA_IT_Consumables_List.pdf

All orders to VITA for in-scope goods and services must be received in eVA. See “Receiving Orders” listed on page 13 below for detailed instructions.

2. **Orders for In-Scope Non-Infrastructure IT Goods which includes Items on the IT Consumables List:**

A) Agencies have been delegated procurement authority for in-scope non-infrastructure IT goods and services up to \$100,000 and can order these goods and services without routing the requisition to VITA. The below rules apply to in-scope, non-infrastructure purchases of IT goods and services up to \$100,000:

- Enter the appropriate PO category (Not “V” category – Do not route to VITA)
- Appropriate use of agency purchase cards (Pcards) is authorized
- Use of VITA statewide contracts is **mandatory**, if applicable
- Enter the actual Supplier as the Vendor
- Enter the agency’s “Bill-To” address (not VITA)
- Enter the actual order dollar value
- Enter specifications of the product or service required in the description field
- Attach all relevant documentation (quotes, sole source approval; cooperative procurement approval, etc.)

B) VITA retains procurement authority for in-scope non-infrastructure IT goods and services greater than \$100,000. All such procurements must be routed to or through VITA. Depending on the agency’s procurement delegation; the below rules apply to in-scope, non-infrastructure purchases of IT goods and services over \$100,000:

- Enter the appropriate “V” PO category (V-code) to route the requisition to VITA for review.
- Use of Pcards is *not* authorized for these orders

a. Procurement to be conducted by VITA:

- Enter Virginia Information Technologies Agency as the vendor; with the location of VITA.
- Enter the requesting agency’s “Bill To” address.
- Enter the estimated dollar value of the requirement.
- Attach specifications for the goods or services requested
- Attach any available vendor quote.
- Enter approved PGR number if applicable

b. Procurement conducted by Agency under an existing statewide contract:

- Use of VITA statewide contracts is **mandatory**, if applicable
- Enter the actual Supplier as the Vendor
- Enter the agency’s “Bill-To” address (not VITA)
- Enter the actual order dollar value
- Enter specifications of the product or service required in the description field
- Attach all relevant documentation (quotes, etc.)
- Enter the PGR number if applicable

c. Procurement conducted by Agency under one-time VITA delegation authority:

(Note: Agency can request delegation by emailing SCMInfo@vita.virginia.gov)

- Agency conducts procurement using the appropriate procurement method
- Create eVA requisition to the successful vendor
- Enter the agency's "Bill To" address."
- Attach a copy of the awarded contract; sole source approval or cooperative procurement approval and any other relevant documentation
- Enter the PGR number if applicable

3. Orders for In-Scope Infrastructure IT Goods and Services

VITA retains all procurement authority for purchasing in-scope infrastructure IT goods and services. All orders for in-scope infrastructure IT goods and services, with the exception of items on the IT Consumables List, must be entered in eVA and routed to VITA for review and approval. The below rules apply to in-scope infrastructure purchases of IT goods and services:

- Select the appropriate eVA "V" PO Category (V-code) at the requisition header
- The use of Pcards is **not** authorized for in-scope infrastructure orders. If a Pcard is loaded to your eVA account, uncheck the 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; with the location of VITA.
- The dollar value of all items will be \$0.
 - In the description field enter the specifications of the product or service required from the VITA Service Catalog at <https://www.vita.virginia.gov/services/service-catalog/personal-computing/>.
(Note: Unless approved as an exception by the CIO or the item is not offered under the service catalog, **all** items should be from the VITA Service Catalog.)
- If there are lengthy specifications, attach them to the eVA requisition as a separate document
- 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's "Bill To" address
- Complete the remainder of the requisition in the same manner as other requisitions for your agency and submit

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

- *Tech Compliance Review - Centralized review by VITA to determine how VITA will fulfill the agency request.*
- *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.*

4. 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 directly from the Supplier 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:

a. 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 (Pcard) is authorized.
- Use of VITA statewide contracts is mandatory, if applicable
- Enter the actual Supplier as the Vendor.
- Enter the agency’s “Bill To” address.
- Enter the actual order dollar value.
- Enter specifications of the product or service required in the description field.
- Attach appropriate documentation (quotes, sole source, cooperative procurement, etc.). Note: All Procurements under Cooperative or GSA contracts are required to come to VITA for approval regardless of the dollar value.

b. Out-of-Scope orders over \$100,000 (All must be routed to or through VITA):

Non-contract Out-of-Scope orders over \$100,000

- Pcards are *not* authorized for these orders
- Use the appropriate “V” PO category (V-code) for each situation outlined below:

i. Procurement to be conducted by VITA:

- Enter Virginia Information Technologies Agency as the vendor; with the location of VITA.
- Enter the requesting agency’s “Bill To” address.
- Enter the estimated dollar value of the requirement.
- Attach specifications for the goods or services requested
- Attach any available vendor quote.
- Enter approved PGR number if applicable

ii. Procurement conducted by Agency under an existing statewide contract:

- Use of VITA statewide contracts is **mandatory**, if applicable
- Enter the actual Supplier as the Vendor
- Enter the agency’s “Bill-To” address (not VITA)
- Enter the actual order dollar value

- Enter specifications of the product(s) or service(s) required in the description field
- Attach all relevant documentation (quotes, etc.)
- Enter the PGR number if applicable

iii. Procurement conducted by Agency under one-time VITA delegation authority:
(Note: Agency can request delegation by emailing SCMInfo@vita.virginia.gov)

- Agency conducts procurement using the appropriate procurement method
- Create eVA requisition to the successful vendor
- Enter the agency's "Bill To" address
- Attach a copy of the awarded contract; sole source approval or cooperative procurement approval and any other relevant documentation
- Enter the PGR number if applicable

iv. Out-of-Scope sole source orders:

- Enter the "V" PO category.
- Enter the actual supplier as the vendor.
- Enter the agency's "Bill To address."
- Attach the approved sole source document.

5. Receiving Orders: All agency orders for in-scope IT goods and services must be received in eVA by the agency. The actual order to the Vendor/Supplier for the goods or services is placed by VITA based on the request submitted by the agency using the procedures in paragraph 3 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/supplier. It also provides information to allow VITA to properly time the initiation of billing to the agency, as appropriate. The below rules apply to receiving in-scope orders in eVA:

- 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 (OrdersEva)** e-mail account that the order has been placed and the anticipated delivery lead time.
- VITA places the agency purchase order number in the "Comment" section at the bottom of the order 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 the packing slip documents from the vendor to your original agency purchase order number, e-mail evaorders@vita.virginia.gov for 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 completed by the agency receiver for the order. (See Receiving Agency Orders for details)
- Upon completion of the receipt in eVA, e-mail evaorders@vita.virginia.gov and advise that receiving is complete. Please note the Receipt#, Vendor, EP#, PR#, items received and any other information relating to the receipt.

- For orders (service requests) provided through VITA's Infrastructure program, they will issue a delivery ticket. The delivery 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.
- 6. Status Requests:** In-scope orders that are submitted with Virginia Information Technologies Agency as the vendor will be placed with an actual vendor by VITA.
- To request status on orders processed by VITA, send an e-mail to eVAOrders@vita.virginia.gov and copy vitaonestop@vita.virginia.gov.

IT Ordering Instructions for eVA

The IT ordering instructions are outlined below:

Requisition Creation:

- To login go to <https://eva.virginia.gov/>.
- Click on Buyer Login
- On the login screen, enter your eVA assigned username and password.
- Should you forget your username or password, locate the link below the login; “Forgot eVA Username/Password” and click the link. Follow the instructions for submission. Once you receive the requested information; return to the login screen, enter the information and click “login”.
- On the left side under Applications, click on [eMall / eForms](#)
- On the left side under **Common Actions; Create**; select Requisition to start the process.
- Enter following information:
 - The use of Pcards is not authorized for infrastructure orders. If you have a Pcard tied to your eVA account, ensure the Pcard box is not checked.
 - Title
 - Select the appropriate V-code for the PO Category (i.e. VR1 for routine VITA orders).
Note: This inserts the VITA approvals into the requisition workflow. This includes the agency’s AITR.
 - Procurement Transaction Type
 - Do not check the “Send to eProcurement” block.
 - Do not check the “Send PR to Sourcing & Contracting block
 - Do not check the “Confirming Order; Do Not Duplicate block
- Under Line Items, click Add Non-Catalog Item (Note: All in-scope infrastructure goods and services should be created as Non Catalog item).
- **Do not put infrastructure and non-infrastructure items on the same requisition. (This will cause your requisition to be denied with a comment asking to correct by removing non-infrastructure items.)**
- Enter a full description. 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 NIGP Commodity Code must be entered. Click on the down arrow, search by word description.
- Click the down arrow for Supplier and select “Search for more...”. In the field type in “Virginia Information%” and click Search. (The % sign is used as a wildcard in the search engine.)
- Select the Virginia Information Technologies Agency with the location of VITA.
- Add any available supplier part number as appropriate.
- Enter the Contract number if there is an existing contract for the item (If no contract exists or you are not sure of the contract number; leave this field blank).
- Insert a quantity.

- Enter the price as zero (\$0). The actual price will be determined by and approved by VITA during the review process.
- Click on OK and the item will be added to your requisition.
- The end user will verify or complete the agency accounting information for the agency budgetary unit paying for the equipment.
- Note: 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 with the exception of 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.
- Note: 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 transactions, not just in-scope “V” coded transactions.**
- At Checkout do a final review and edit of the transaction as required.
- Immediately below the section of the Checkout page shown above there is a comments box 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. (Note: You can ad-hoc additional approvers if necessary but you cannot remove existing approvers.)
- Click Submit to start the requisition in the workflow. Upon completion of the final approval, the order will be sent to VITA for processing. VITA will submit an order to the supplier and will bill the agency. VITA will pay the supplier and the agency will pay VITA. VITA will process the order and have goods or services delivered to the agency.

PO Printing Requirement: Approval flow for non-registered eVA vendors or registered vendors that have 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.
- After you submit the requisition it will go through the approval process and return to the person defined for this approval (the Requester).
- The PO Print approver must approve the order and then wait for the requisition status to change to “Ordered” (approximately 15 minutes). Once the status changes to “Ordered”, go in and open the purchase order (will begin with EP, DO or PCO) and print. Fax, email or mail the printed purchase order to the vendor.

Note: NEVER email your requisition to the vendor. Requisitions sometimes include notes that the vendor is not expected to see. Also, when submitting Infrastructure orders, NEVER email your agency order, with VITA as the vendor, to the real vendor. VITA orders include additional information that vendors should not see.

Approval Process:

- Receive an email from Ariba (PROD Ariba) stating that PRxxx (requisition number) requires your approval because.....
- Login to eVA. Either by clicking the link in the email or at <https://eva.virginia.gov/>.
(If you click on the link in the email, it should take you into the request; if you enter at the website, it will take you to the login portal.)
- Enter your assigned username and password
- At the login portal; click on eMail / eForms; brings up the “My Home” page. The requisition(s) awaiting your approval will be under the “To Do” section.
- You can approve the requisition either by clicking on “Approve” to the far right (not recommended unless you are positive that everything on the requisition is correct) or click on the links for the requisition number or requisition title.
- Review the requisition and if everything is correct, click “Approve” at the top, middle of the page.
- If you need to change the requisition, you must click the “Edit” button at the top, middle of the page. *(Note: You can only edit a requisition if you have edit approval authority.)*
- Verify that the Pcard block has been unchecked. Edit and remove if it has been checked.
- Verify that a “V” PO Category (V-code) has been selected. Edit and change if the “V” code has not been selected.
- **Verify that the eProcurement block and the Send PR to Sourcing & Contract block are not checked. Edit and remove if it is checked.**
- Verify the technical details of the order and edit as appropriate.
- Changes to the requisition may start the approval process over.
- Click on Detail to review the remainder of the requisition. Edit if required.
- Click the Save button again and the requisition will go back through the approval workflow.
- Click OK to confirm approval.

Receiving Agency Orders

Infrastructure Goods and Services: Receiving for all IT infrastructure goods and services orders must be completed 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.

To Receive in eVA:

- Go to <https://eva.virginia.gov/>.
- Enter your Username and password and click login.
- At the login portal; click on eMail / eForms; brings up the “My Home” page. The requisition(s) awaiting your approval will be under the “My Documents” section.
- Selection the requisition to receive against
- Click the Receive button at the top center of the page
- 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.

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.

- 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. (*Note: An order that has receiving closed can't be changed without re opening for receiving.*)
- To reopen, click on eMall / eForms
- Click on "Manage" (top left corner under "My Home" tab)
- Click on "Receive"
- At the Receiving Steps page, enter either the Order ID or Req ID in the Search box and click Search
- You will see "! Note this order is closed for receiving" at the top left corner
- 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.
- Note that the order/requisition is now back in a receiving status.
- Click on the PR being changed
- 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. You are not able to delete any fully received item on the order.