eMall Volume 1

eMall User Guide

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Version 5

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1. DOCUMENT OVERVIEW

This two-volume User Guide describes the eVA requisition process, including shopping, order placement, and receiving, as well as other eMall functionality. The contents of each volume are summarized below.

eMALL® VOLUME 1

eMall Volume 1 contains the following sections:

eVA Requisition Process Overview
Accessing the eMall
Navigating the eMall
Using the Dashboard
Creating a Requisition
Editing Line Items
Searching the eMall
Approving a Requisition
Working with Orders
Modifying a Requisition
Working with Change Orders
Understanding Integration
Getting Answers to Your Questions

eMALL VOLUME 2

eMall Volume 2 contains the following sections:

eMall Overview
Introduction to Receiving
Receiving Ordered Items
Receipt Approvals
Other Receiving Functionality
Preferences
Explore
Operational Reporting
Getting Answers to Your Questions

USING THIS GUIDE

The features described below are designed to help you find the information you need in this guide; please take a few minutes to review them.

HYPERLINKS

Hyperlinks have been added to help you navigate through the guide. Each entry in the Table of Contents is formatted as a hyperlink that will take you directly to that topic. Cross-references, such as "See Table 6," or "Figure 2 shows …" are also hyperlinked, so that you can click the reference to go to the related information.

TYPOGRAPHICAL CONVENTIONS

The typographical conventions described in **Table 1** are used throughout this guide. They are designed to provide visual cues that can help to differentiate the various kinds of objects under discussion.

Note that text conventions are applied to the proper name of the item but not to the defining term (screen, field, button, check box, etcetera), which will be omitted for simplicity when possible.

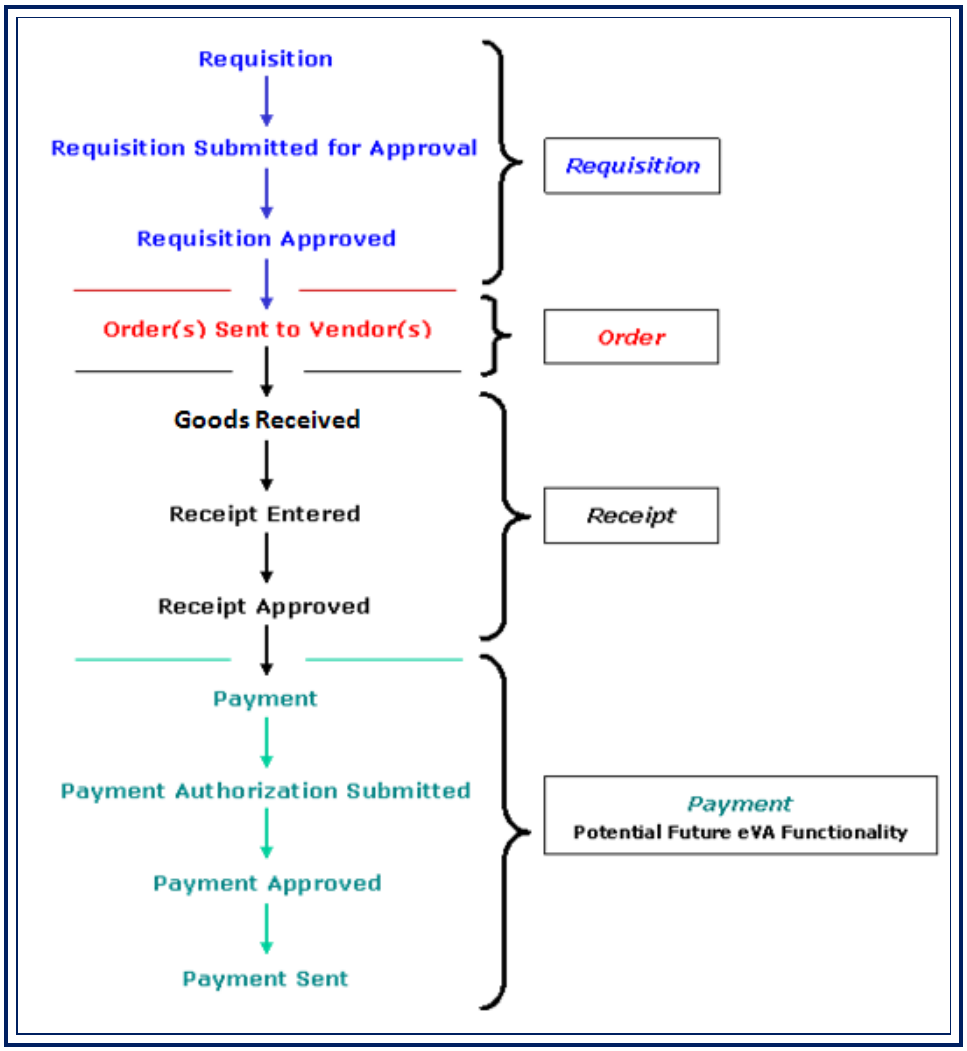
Table 1: Typographical Conventions Employed in This Guide

Item	Convention	Example
Screen Titles	Small caps, bold print	**SAVED REPORTS** screen **DASHBOARD**
Field Names	Initial caps, bold print	**Title** field **Description**
Control Labels	Initial caps, bold print	**Use PCard** check box **Client Name** pick list
Flag or indicator setting Parameter value Phase or Status Menu Item or Command	Initial caps, italic print	If the flag is set to *Yes*, then … When set to *Statement,* … An order in *Composing* status Select *Save* on the **File** menu
Buttons	Initial caps, bold print	**Submit** button **Save**
Links	Links that are active in this document appear in blue text. Position the cursor over the link to see a screen tip. Links that are active in the application but are not active in this document are underlined.	http://eva.virginia.gov/ The Requisition link will …
Cross-references	There are two types of cross-references in this document. All are linked to the object or section to which they refer. Cross-references to tables, figures, and page numbers appear in initial caps, bold print. This type of cross-reference link can also be identified by the shading that appears when it is selected. Cross-references to text appear in blue print and are underlined for easy identification.	See **Figure 1** See Interface Tools for more information.

2. eVA REQUISITION PROCESS OVERVIEW

The following diagram illustrates the eVA procurement process from requisition through payment. This volume focuses on the eVA Requisition process, from Requisition to Order Sent to Vendor, but a brief overview of the entire process is provided below.

Figure 1: eVA Requisition Process End-to-End



PURCHASE REQUESTS AND ORDERS

There are multiple methods for creating orders in eVA. The most common way is to create a Purchase Request (PR) in the eMall, submit it for approval, and apply any required approvals. The eMall creates a purchase order from the approved PR and sends the purchase order to the supplier.

There are also several types of requisitions and purchase orders.

REQUISITIONS

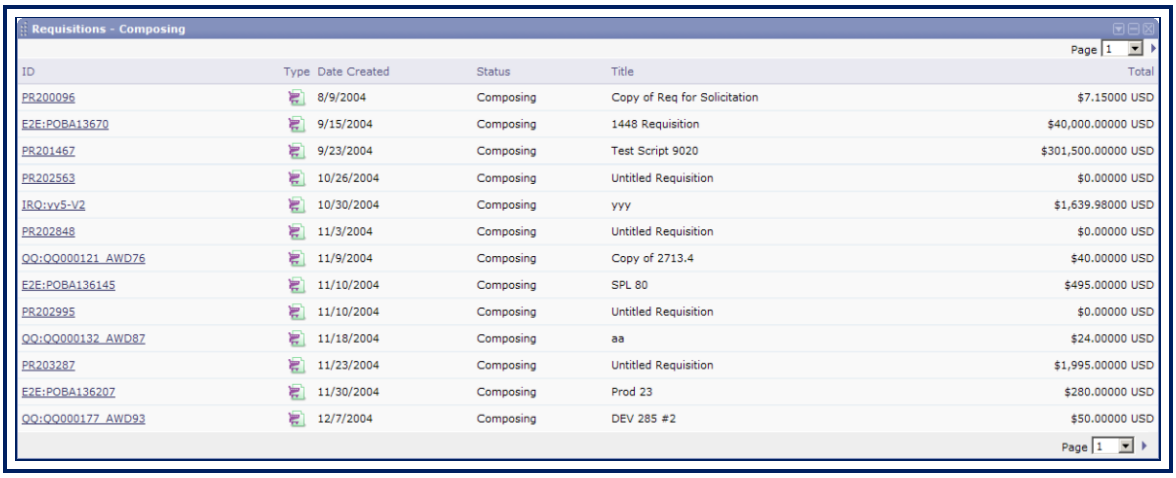
Table 2 shows various types of requisitions that can exist in the eMall, where each type originates, and the associated prefix. A system-generated or imported number is added to the appropriate prefix to create a unique ID number for each requisition. This ID number is used to track the request through the eMall; the prefix lets you identify the request type at a glance, and easily sort requests by type.

Table 2: Requisition Types

Document	Source	Prefix
Purchase Request	eMall	PR
Quick Quote Award	Quick Quote	QQ:QQ
End-to-End Award	eProcurement	E2E:POB
Imported Requisition	Order Import (Agency Interface)	IRQ:Axxx

As indicated in **Table 2**, some requisitions are created in the eMall, while others are imported from another source, such as Quick Quote. **Figure 2** provides an example of a status screen showing a variety of request types, each identifiable by the prefix in the ID number.

Figure 2: Status Screen Displaying Multiple Request Types



Requisitions - Composing

Page 1

ID	Type	Date Created	Status	Title	Total
PR200096		8/9/2004	Composing	Copy of Req for Solicitation	$7.15000 USD
E2E:POBA13670		9/15/2004	Composing	1448 Requisition	$40,000.00000 USD
PR201467		9/23/2004	Composing	Test Script 9020	$301,500.00000 USD
PR202563		10/26/2004	Composing	Untitled Requisition	$0.00000 USD
IRQ:yy5-V2		10/30/2004	Composing	yyy	$1,639.98000 USD
PR202848		11/3/2004	Composing	Untitled Requisition	$0.00000 USD
QQ:QQ000121_AWD76		11/9/2004	Composing	Copy of 2713.4	$40.00000 USD
E2E:POBA136145		11/10/2004	Composing	SPL 80	$495.00000 USD
PR202995		11/10/2004	Composing	Untitled Requisition	$0.00000 USD
QQ:QQ000132_AWD87		11/18/2004	Composing	aa	$24.00000 USD
PR203287		11/23/2004	Composing	Untitled Requisition	$1,995.00000 USD
E2E:POBA136207		11/30/2004	Composing	Prod 23	$280.00000 USD
QQ:QQ000177_AWD93		12/7/2004	Composing	DEV 285 #2	$50.00000 USD

Page 1

ORDERS

When a PR (or other type of requisition) is approved, the eMall automatically generates an Order from the approved request. Orders, like requests, can also be imported from other sources. **Table 3** shows the types of orders that can exist in the eMall, where each type originates, and the prefix associated with each order type.

Table 3: Order Types

Document	Source	Prefix
Direct Order	eMall (agencies not using eProcurement)	DO
EProcurement Order	eMall (eProcurement agencies)	EP
PCard Order	eMall	PCO
Quick Quote Award	Quick Quote	QQ
End-to-End Award	eProcurement	POB
Imported Order	Order Import (Agency Interface)	DO, PCO, EP

If your agency is enabled for complex eProcurement and/or ERP integration, your eVA orders will begin with **EP**. If not, your eVA orders will begin with **DO**, or, if you are using a purchase card, orders will begin with **PCO**.

IMPORTED AND EXPORTED ORDERS

The eMall allows agencies and other entities to send order requests from the entity system to be fulfilled through eVA. The eMall can also produce completed order and receipt data for entity systems to pick up for their own use.

Imported Orders

Orders can be imported to the eMall for fulfillment by eVA and the Ariba Network (AN). See the *eVA Overview Guide* for information on the AN.

These orders are imported as purchase requests that begin with the prefix IRQ. They can be submitted to the eMall for approvals, if required; or if no approval is needed, a submitted request will transition to a purchase order without user intervention.

Imported orders are subject to the same rules and requirements as orders that are entered online as requisitions.

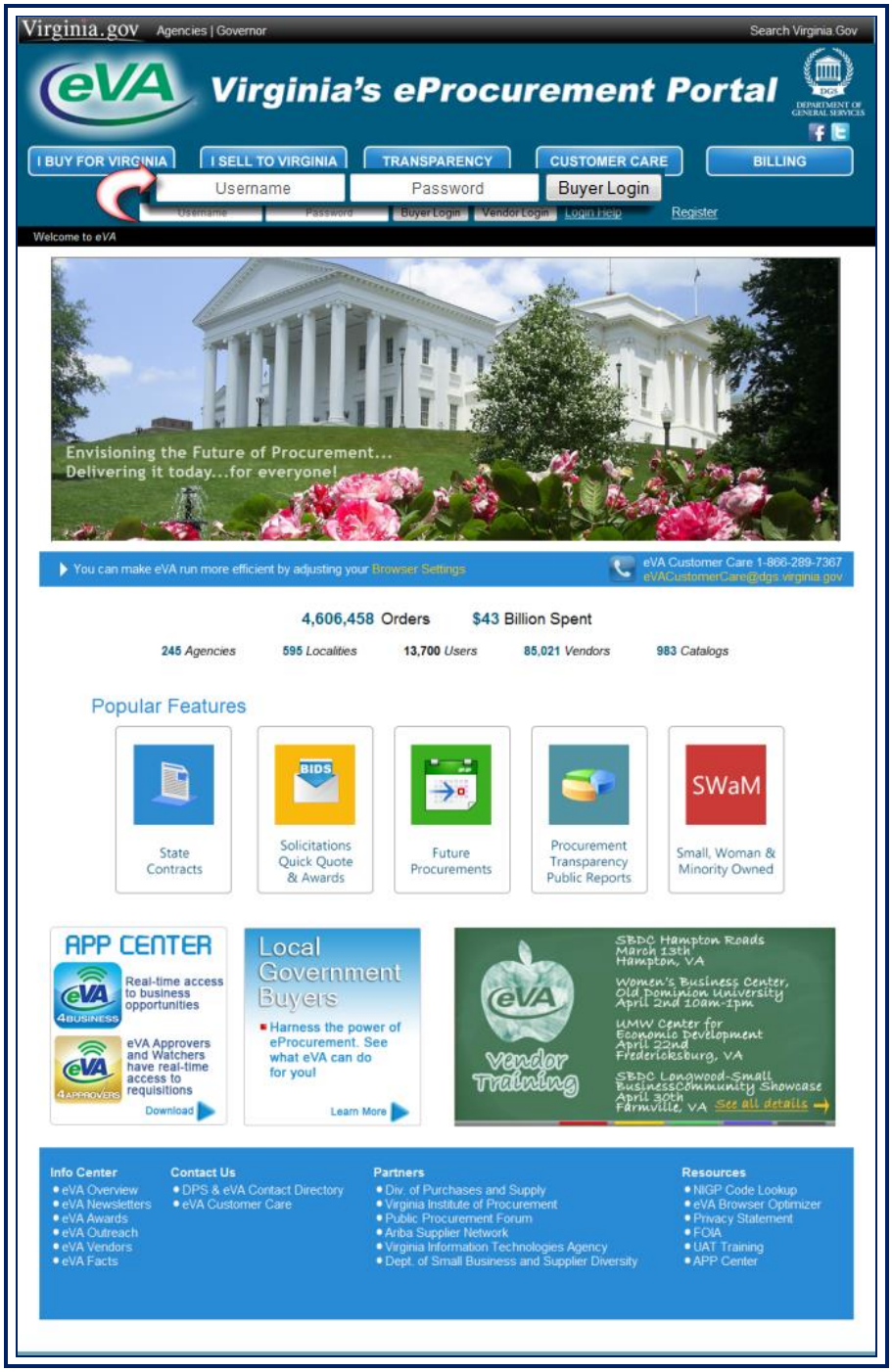
Exported Order and Receipt Data

Each day's purchase order and receipt transactions are compiled into a report and exported in a standard format. Entity systems can retrieve the report for their own agency/entity, and use the data as they wish.

3. ACCESSING THE EMALL

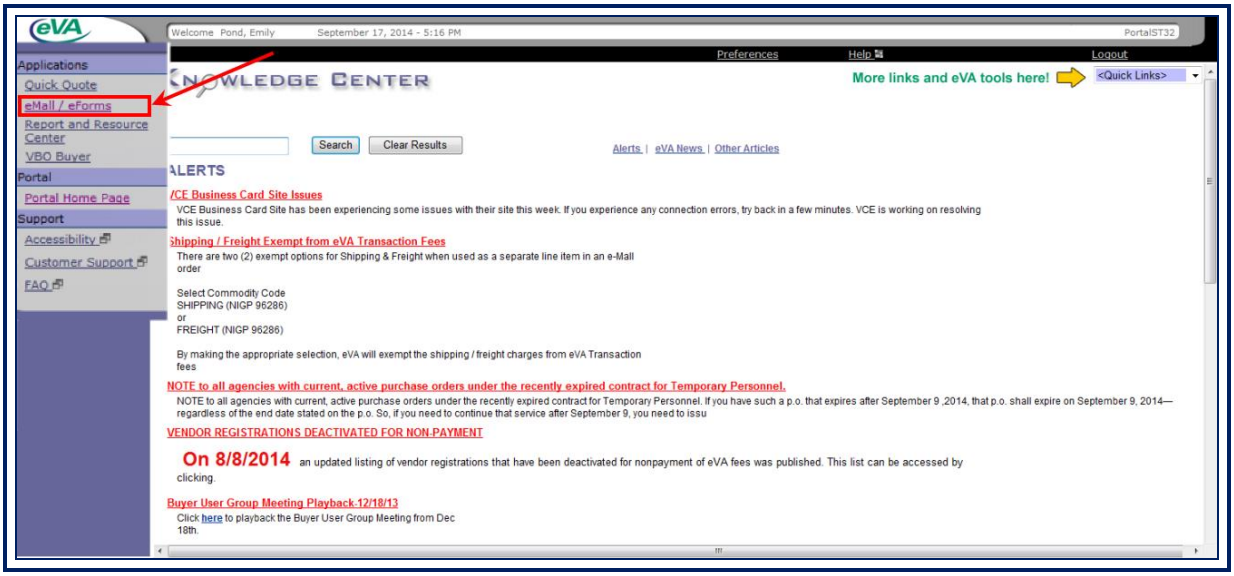
You must have a valid user name and password in order to access the eMall. Go to the **eVA LOGIN** screen at http://eva.virginia.gov/ and enter your user name and password and click the **Buyer Login** button (**Figure 3**). A successful login will take you to the **eVA KNOWLEDGE CENTER** screen within the eVA Buyer Portal (**Figure 4**).

Figure 3: eVA Home Page with Login



To continue to the eMall, click the eMall / eForms link in the left navigation panel of the **KNOWLEDGE CENTER** screen (**Figure 4**). This will open the **My Home** tab of the Ariba Buyer **DASHBOARD**, your entry point to the eMall and all of its features (**Figure 13**).

Figure 4: Access the eMall from the Knowledge Center

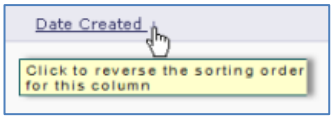
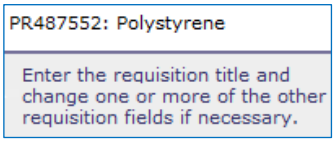
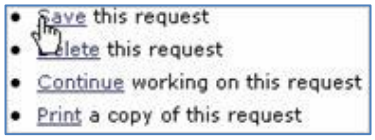


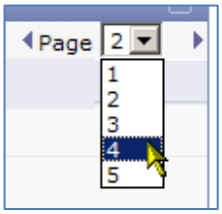
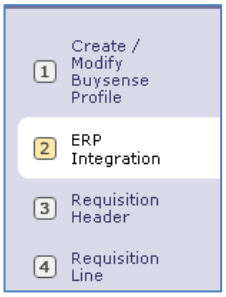
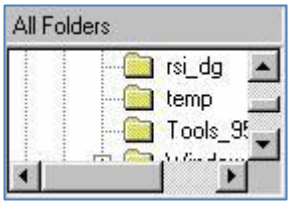
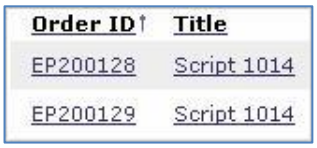
4. NAVIGATING THE EMALL

INTERFACE TOOLS

Table 4 provides an introduction to tools you will find in the eMall user interface. Some of these tools will already be familiar to you, as they are common to many web-based applications.

Table 4: User Interface Tools

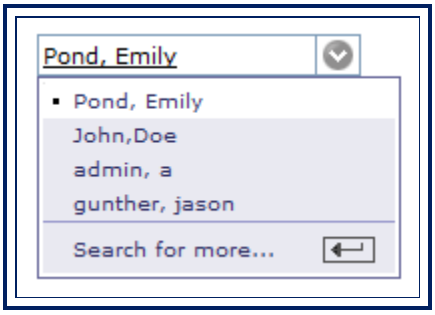
Tool	Example	Function
Calendar Icon and Date Field		Click the **Calendar** icon to open an interactive calendar that can display nine consecutive months, starting with the current month. Use the calendar to select a date for the associated **Date** field, or enter a date manually. The accepted format for dates is *dd/mm/yyyy*.
Dashboard Icon		The **Dashboard** icon appears on the left end of **Command Bar** when you leave the **DASHBOARD** screen. Click this icon to return to the Dashboard. The application gives you the option to save your work before leaving the current screen.
Drop-down list		Click the down arrow to open a list of available values for that field. Some drop-down lists have pre-set values; others are populated by your recent selections. Select *Other* to open a pick list of all valid options for that field.
Field tips		Position the cursor over an object, such as a field, link, or button, to display a text box with information about that object.
Inline Help Tips		Most eMall screens contain at least one inline help tip, usually near the top, that briefly explains the purpose of the screen and the basic actions that you can take.
Link		There are two kinds of links in the eMall: navigation links and action links. • Clicking a navigation link will take you to a new screen or web site. • Clicking an action link will, as the name implies, initiate an action, such as saving or printing the active request.

Tool	Example	Function
Multiple page navigation		When a data list spans two or more pages, the eMall provides two ways to move between pages: • Use the right and left arrows to go forward or backward one page at a time. • Select the down arrow on the drop-down list to see a list of all pages in the section. Select any page number to go directly to that page.
Process Step Navigation Panel		A few transaction processes span several screens, but some of those screens might not be needed for every transaction. For such processes, the **Process Step Navigation** panel replaces the **Left Navigation** panel. This navigation panel contains a link to each step in the process, so you can move among them in any order and skip steps that aren't applicable to a particular transaction.
Navigation buttons		Navigation buttons are available on most screens in the eMall. Use them to move between screens, to move between steps in an eMall process, or to exit the current process. **DO NOT** use your browser's navigation buttons, especially to go backwards. Doing so can cause data to be lost.
Refresh Content		The information on the DASHBOARD screens update automatically when you leave a screen and then return. Use the **Refresh Content** button when you want to see your updates without leaving the current screen.
Return to Portal Button		The **Return to Portal** button is available on all DASHBOARD tabs. Click this button to go back to the KNOWLEDGE CENTER.
Scroll bars		Scroll bars appear when the contents of a window are too large to display completely. Select and slide the scroll bars at the right side or bottom of an eMall screen to view material beyond the boundaries of the window. When all of the contents fit inside the display window, scroll bars will not be present.
Sorting		If an underline appears when you position the cursor over a column heading, that column can be sorted alphanumerically. An arrow next to the column heading lets you see whether the information is sorted in ascending order (up) or descending order (down). • Click the column heading to sort the data in that column. • Click the column heading a second time to reverse the sort order.

SEARCH FOR MORE … MENU OPTION

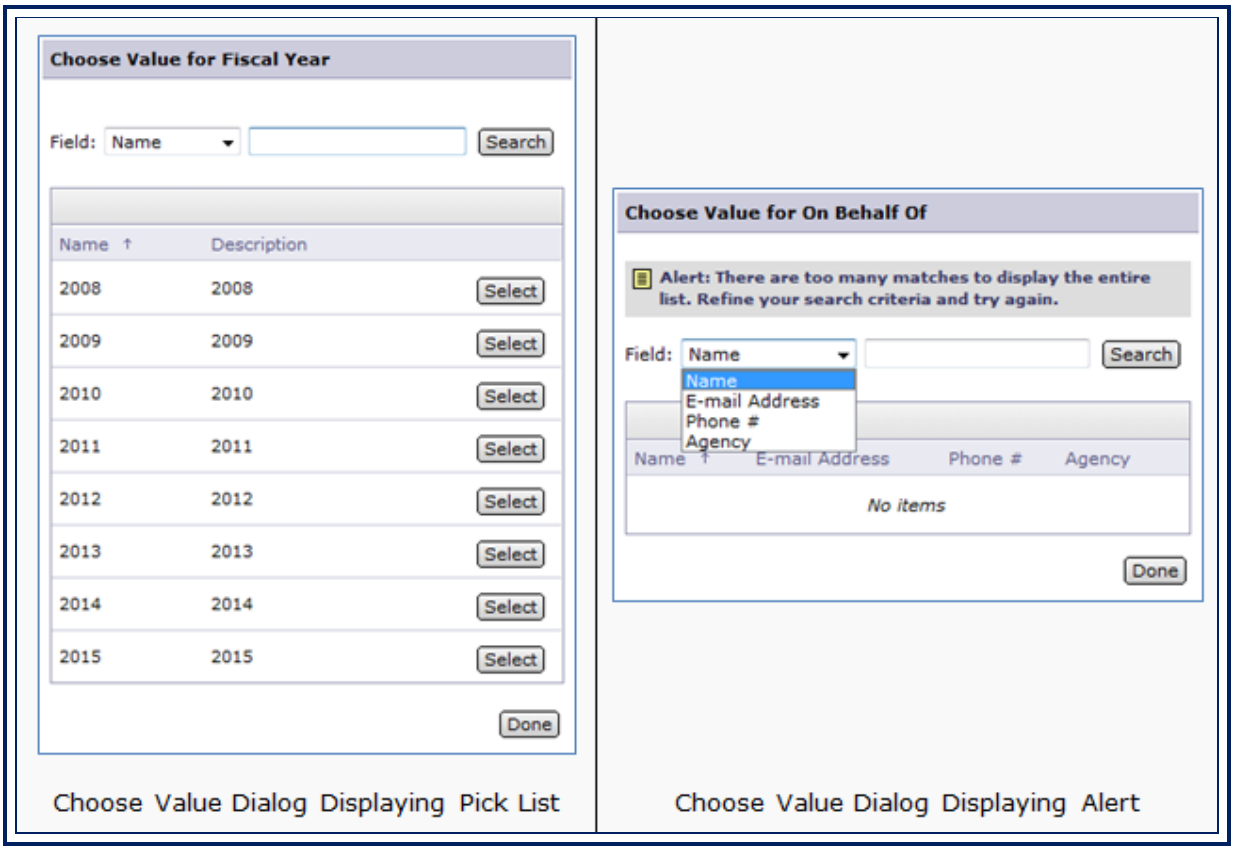
The eMall uses drop-down lists when a selection of values is available. When there are more values than are easily accommodated in a drop-down list, a few values are displayed with the option to **Search for more** … at the bottom of the list. **Figure 5** shows an example of this option in a drop-down list.

Figure 5: Search for more … Option



If the value you need does not appear in the drop-down list, click **Search for more** … to open a **Choose Value** dialog box. Depending on the total number of valid values for that particular field, the **Choose Value** dialog will present either a pick list with search options, or a notice that there are too many values to display, along with search options (**Figure 6**).

Figure 6: Two Examples of the Choose Value Dialog Box



Often you will be able to choose among several fields to search on, as shown in **Figure 6**. If the **Field** drop-down list includes the option to select *All*, you can search against all of the fields in the drop-down list at the same time. Be aware, however, that this type of search might take a little longer to run.

5. USING THE DASHBOARD

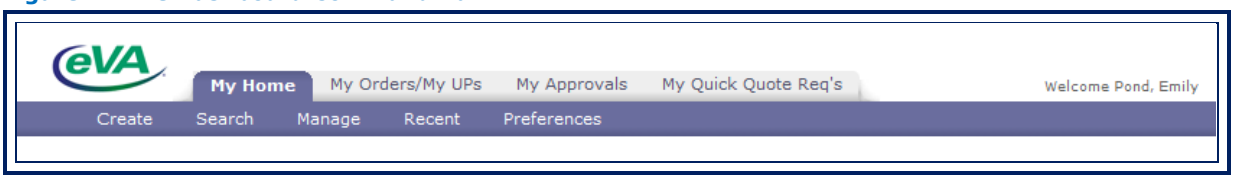
The eMall **DASHBOARD** comprises a set of configurable tabs, each of which displays one or more list frames, and a command bar. This is your "command center," from which you can access all of the tasks associated with creating requisitions and receiving orders, monitor status, and perform various administrative chores.

This section provides a detailed introduction to the Command Bar, followed by information about each of the standard Dashboard tabs.

THE COMMAND BAR

The **Command Bar**, with its drop-down menus and screen tabs, appears near the top of the screen. It is accessible from any **DASHBOARD** tab.

Figure 7: The Dashboard Command Bar



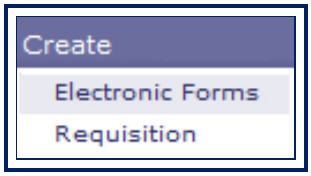
COMMAND BAR MENUS

The **Command Bar** features five drop-down menus in addition to the tabs. Each menu is described below.

"CREATE" MENU

The **Create** menu **(Figure 8)** lists the various objects that you are authorized to create in the eMall. The options listed on your **Create** menu may vary from those shown here, depending upon the permissions assigned to you. For example, electronic forms (eForms) are available through the eMall and are being added on an ongoing basis; however, you must have the appropriate permissions assigned to you in order to see the eForms.

Figure 8: Create Menu Selections

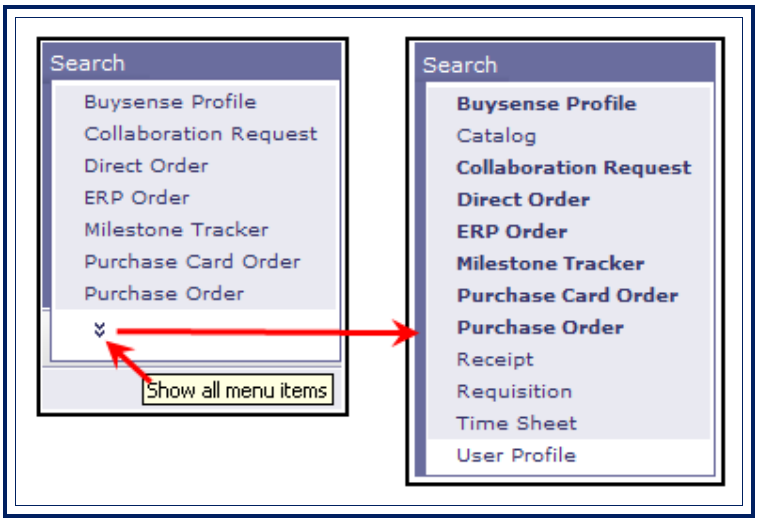


"SEARCH" MENU

The **Search** menu presents a list of the searchable item types available to you, based on your assigned permissions. Double arrows at the bottom of the menu indicate that more selections are available. Click the double arrows to see the expanded **Search** menu (**Figure 9**). The expanded menu displays all available selections, with items from the original list in bold text.

When you select an object on the **Search** menu, the screen that opens contains search parameters that are specific to your selection. See Searching the eMall for more information regarding the **SEARCH** screens.

Figure 9: Search Menu and Expanded Search Menu



"MANAGE" MENU

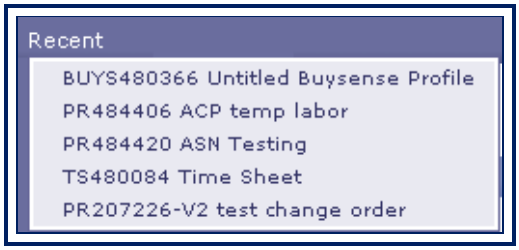
This menu provides access to certain administrative tools, such as the **Commodity Code Manager** and the **Catalog Manager**, and to system-generated reporting tools. Receiving tasks also can be accessed through the **Manage** menu. These features are described in detail in *eMall User Guide, Volume 2*.

Figure 10: Manage Menu Selections

"RECENT" MENU

The **Recent** menu provides quick access to the five most recently viewed documents, including requisitions, Quick Quote requests, user profiles, eForms, time sheets, and Buysense profiles.

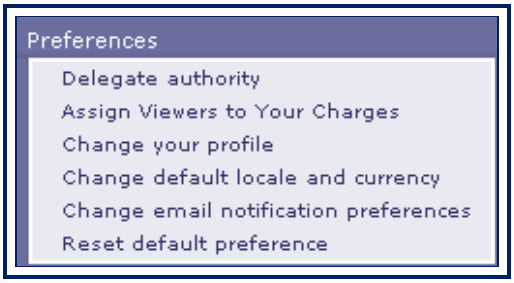
Figure 11: Menu of Recently Viewed Documents



"PREFERENCES" MENU

The **Preferences** menu provides access to eMall features that you can customize according to your needs. These include your profile information and other attributes that relate to your abilities inside the eMall, such as the ability to delegate approval authority and to determine the type and frequency of email notifications (**Figure 12**).

Figure 12: Preferences Menu Selections



COMMAND BAR TABS

The number of tabs on your **Command Bar** depends on two factors:

- The extent to which the eMall has been customized for your agency, and
- The permissions assigned to you.

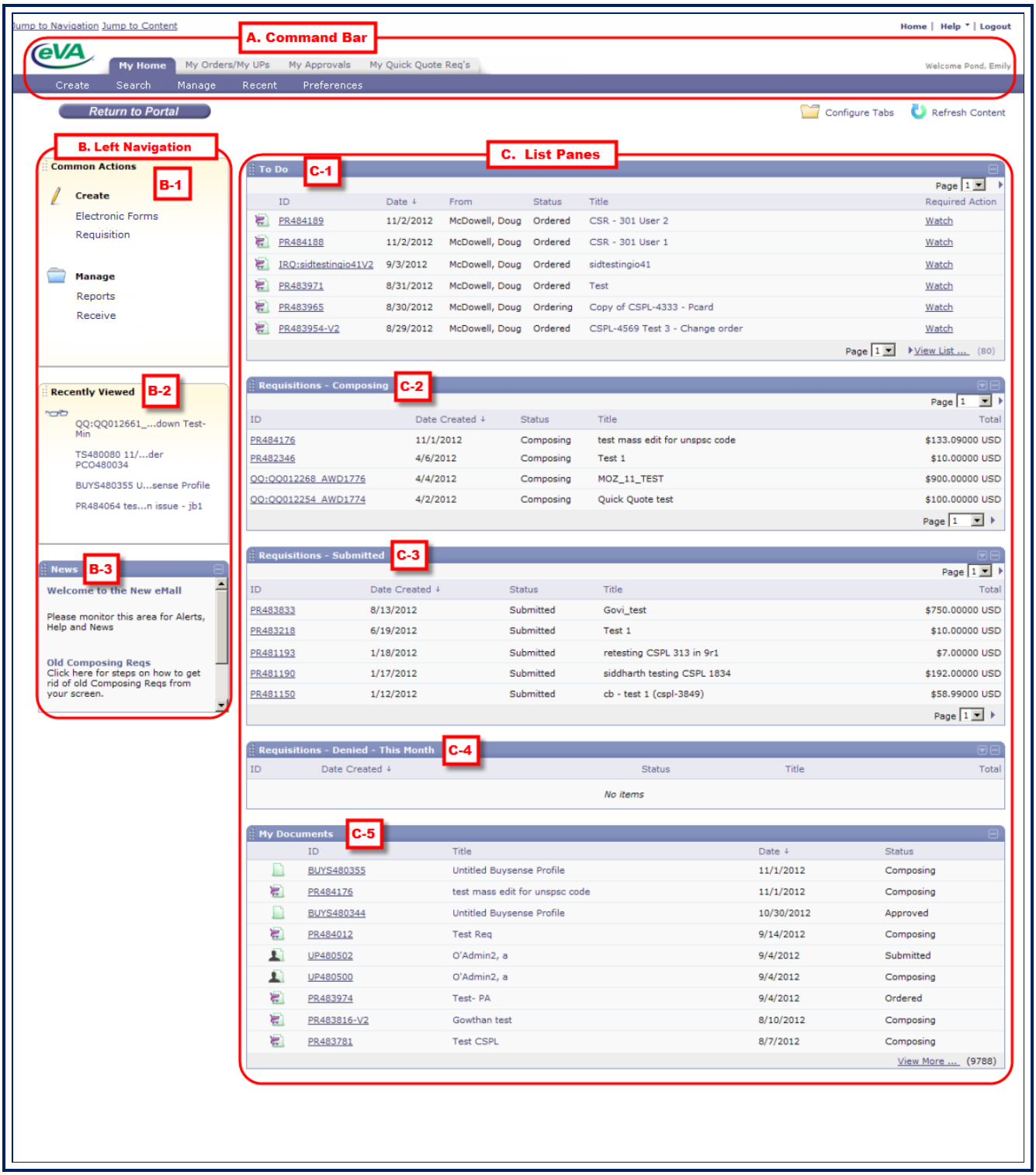
In the example shown below in **Figure 13**, there are four tabs. You can add or delete tabs as needed. You can also add, remove, and rearrange content to best meet your needs. See Configuring Dashboard Tabs to learn how to customize these tabs.

"MY HOME" TAB

The **My Home** tab is the main **DASHBOARD** screen. **Figure 13** provides an overview of the My Home tab (including the Command Bar) with the sections numbered, followed by a key that gives the section name for each number.

The first time you click the eMall / eForms link in the **KNOWLEDGE CENTER**, the **DASHBOARD** screen opens to the **My Home** tab. After the first time, the screen will open to the last active tab.

Figure 13: The "My Home" Tab - Your eMall Dashboard



Key to Figure 13*

Section	Number	Subsection
The Command Bar	A	N/A
Left Navigation Panel	B-1	Common Actions
	B-2	Recently Viewed
	B-3	News
List Panes	C-1	To Do
	C-2	Requisitions – Composing
	C-3	Requisitions – Submitted
	C-4	Requisitions – Denied – This Month
	C-5	My Documents

*For more information about any of these items, click the corresponding link.

LEFT NAVIGATION PANEL

The **DASHBOARD** left navigation panel is available on the **MY HOME** screen (**Figure 13**). It comprises three separate windows designed to provide quick access to common actions, work in progress, and news.

B-1 Common Actions

The **Common Actions** window combines the selections found on the **Create** and **Manage** menus. You might have noticed that the links and commands available in the left navigation panel are also available in the **Command Bar** menus. This arrangement is in keeping with the concept of a command center, where quick access to major functions is expected; however, you can choose the access methods with which you are most comfortable.

B-2 Recently Viewed

The **Recently Viewed** window contains links to the last five documents you looked at. These will be the same documents that you access from the **Recent** menu.

B-3 News

The **News** window displays information specific to the eMall. This is different from the **KNOWLEDGE CENTER**, which displays news and information about all components of the eVA eProcurement tools. Check the **News** window to find information about enhancements to the eMall and helpful hints to help you get the most from your eMall experience.

DASHBOARD LISTS

The **MY HOME** screen displays several configurable lists of requests. Each list appears in its own frame with a set of tools to manage its appearance and order. **Figure 14** shows the location and function of these tools. To see details of any list item, click its ID number.

Figure 14: List Tools

Filtering Dashboard Lists

In addition to the standard tool set, some dashboard lists can be filtered to display only specified information.

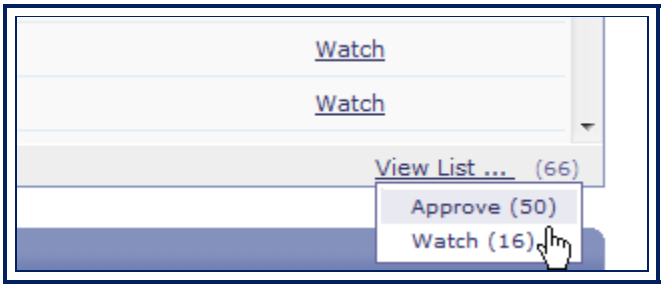
- If the list contains multiple document types, as can be the case in the **My Documents** list, or offers a choice of actions the user can take, like the **To Do** list, you will see a **View** menu in the lower right corner of the list, as shown in **Figure 15**. After you apply a filter to the list, you can further control the appearance and organization of the list.
- If the list contains homogenous documents (only requisitions in *Composing* status, for example), there is no filtering, but you can control the appearance and organization of the list.

The following section concerning the **To Do** list includes more information on how to customize the appearance of Dashboard lists.

C-1 To Do List

The **To Do List** is often the first list under the **Command Bar**. (The position of each list on the screen can be customized for individual agencies.) The **To Do** list groups together all requisitions and other requests that require some action on your part; requests that you can approve, deny, watch, or forward to another user. Controls at the bottom of the list allow filtering by required action, as shown below in **Figure 15**.

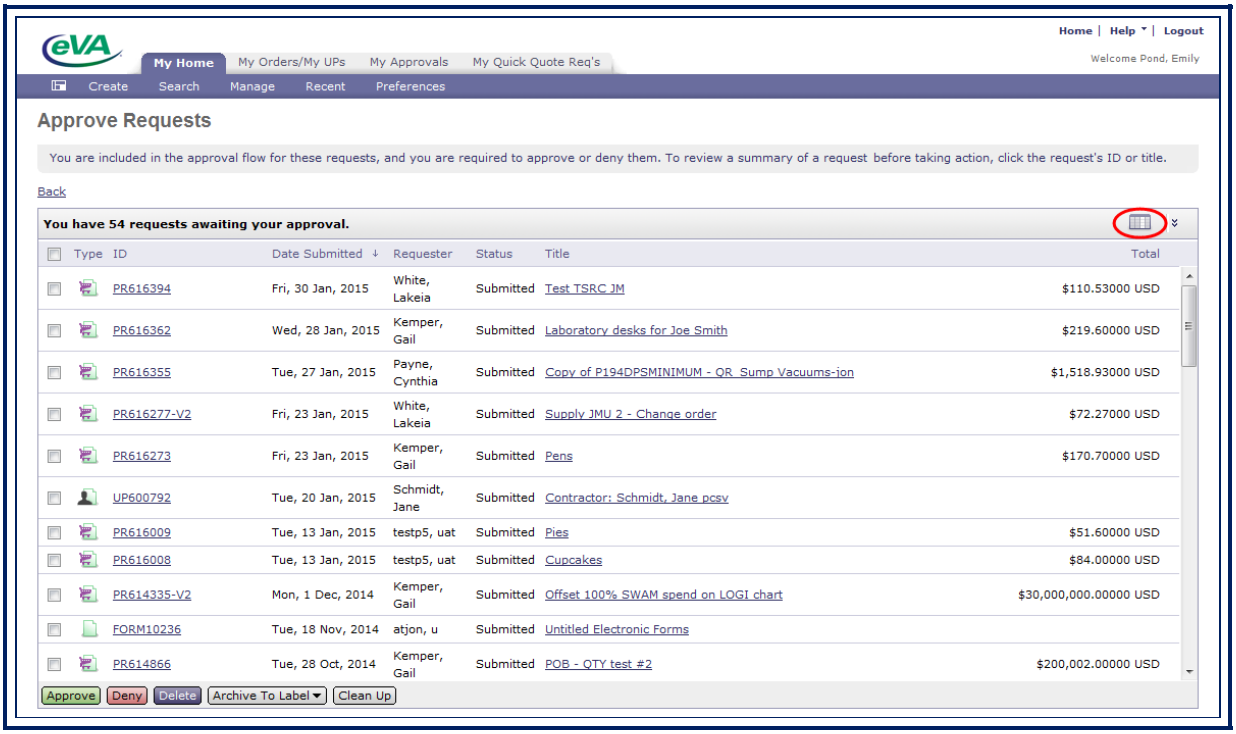
Figure 15: Filter To Do Lists by Required Action



Choose one of the filters shown to go to a list screen where you can continue to work, or you can further customize the way the information is presented (**Figure 16**).

In this example, the *Approve* filter is selected to display the **APPROVE REQUESTS** screen. All items displayed on this screen require the user's approval.

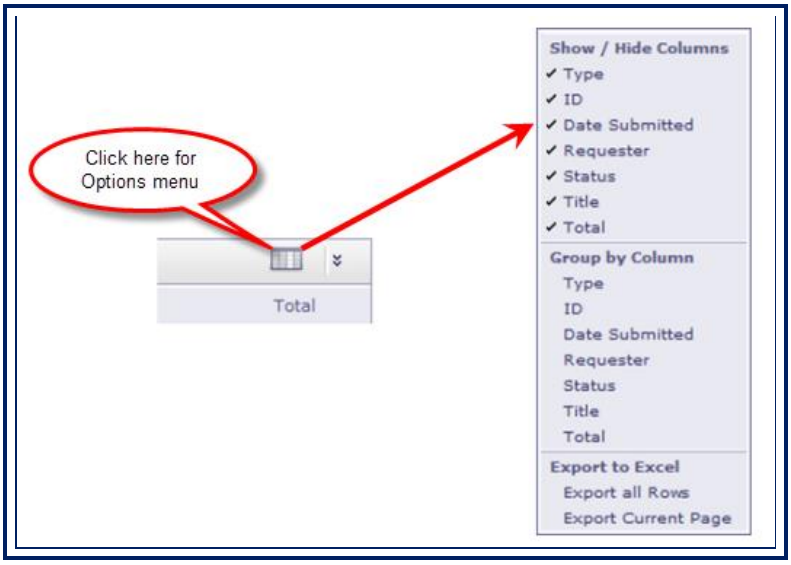
Figure 16: Approve Requests Screen – Location of Options Menu



Type	ID	Date Submitted	Requester	Status	Title	Total
	PR616394	Fri, 30 Jan, 2015	White, Lakeia	Submitted	Test TSRC JM	$110.53000 USD
	PR616362	Wed, 28 Jan, 2015	Kemper, Gail	Submitted	Laboratory desks for Joe Smith	$219.60000 USD
	PR616355	Tue, 27 Jan, 2015	Payne, Cynthia	Submitted	Copy of P194DPSMINIMUM - QR_Sump Vacuums-jon	$1,518.93000 USD
	PR616277-V2	Fri, 23 Jan, 2015	White, Lakeia	Submitted	Supply JMU 2 - Change order	$72.27000 USD
	PR616273	Fri, 23 Jan, 2015	Kemper, Gail	Submitted	Pens	$170.70000 USD
	UP600792	Tue, 20 Jan, 2015	Schmidt, Jane	Submitted	Contractor: Schmidt, Jane pcsv	
	PR616009	Tue, 13 Jan, 2015	testp5, uat	Submitted	Pies	$51.60000 USD
	PR616008	Tue, 13 Jan, 2015	testp5, uat	Submitted	Cupcakes	$84.00000 USD
	PR614335-V2	Mon, 1 Dec, 2014	Kemper, Gail	Submitted	Offset 100% SWAM spend on LOGI chart	$30,000,000.00000 USD
	FORM10236	Tue, 18 Nov, 2014	atjon, u	Submitted	Untitled Electronic Forms	
	PR614866	Tue, 28 Oct, 2014	Kemper, Gail	Submitted	POB - QTY test #2	$200,002.00000 USD

Click the table icon located at the top right corner of the results list to access an options menu that will allow you to further customize the list display (**Figure 17**).

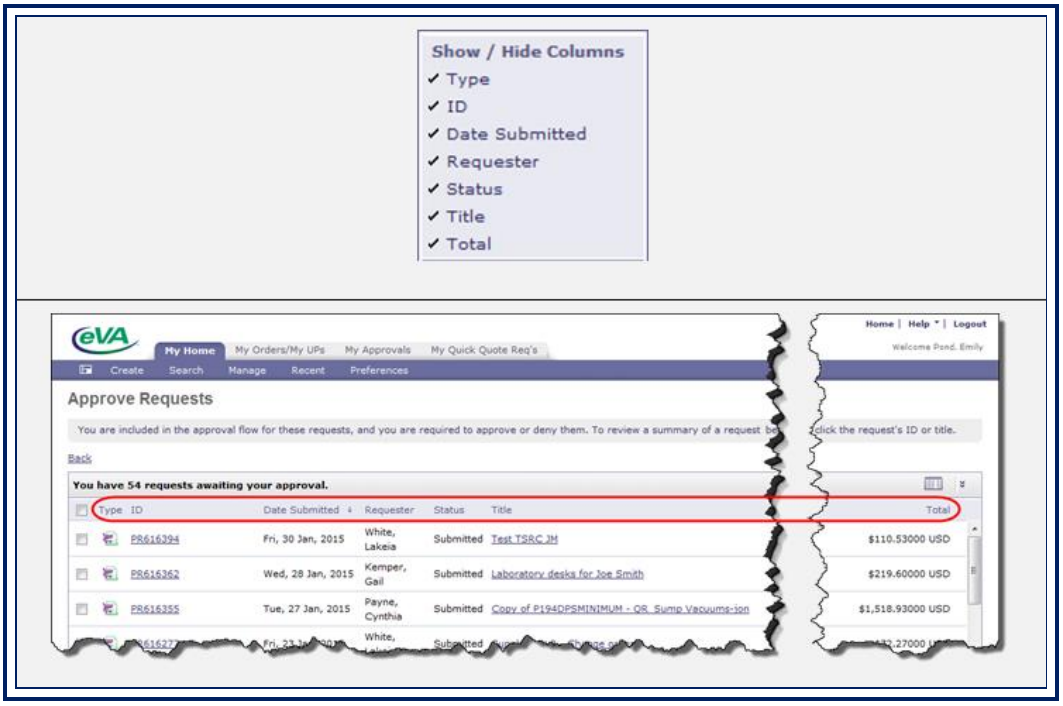
Figure 17: To Do List Options Menu



Show/Hide Columns

The first section of the options menu lists all of the columns that make up the results list. In this case, notice that under *Show/Hide Columns,* all of the items are checked, and all of these columns are visible on the **Approve Requests** list (**Figure 18**).

Figure 18: Options Menu Controls Column Visibility



If you were to clear the check mark beside *Type* (by clicking *Type*), that column would be hidden on the screen. Lists that, by definition, contain only one type of document usually have the Type column hidden by default.

Group By Column

The next section of the options menu (Group by Column) offers the ability to group the related list by any of its column headings. One possible grouping that many users find helpful is Group by Requestor.

IMPORTANT! *You can select only one* **Group By** *value at a time.*

Notice that **Requester** no longer appears as a column heading in **Figure 19**. In fact, if you look at the option menu again, you will see that *Requester* is no longer checked under **Show/Hide Columns (Figure 20)**. Instead, each Requester value appears as an expandable row in the list.

Requesters are listed in descending alphabetical order (from A to Z). If a Requester has more than one request awaiting approval, the requests are listed in date order with the newest on top.

Figure 19: Approvals Grouped by Requester

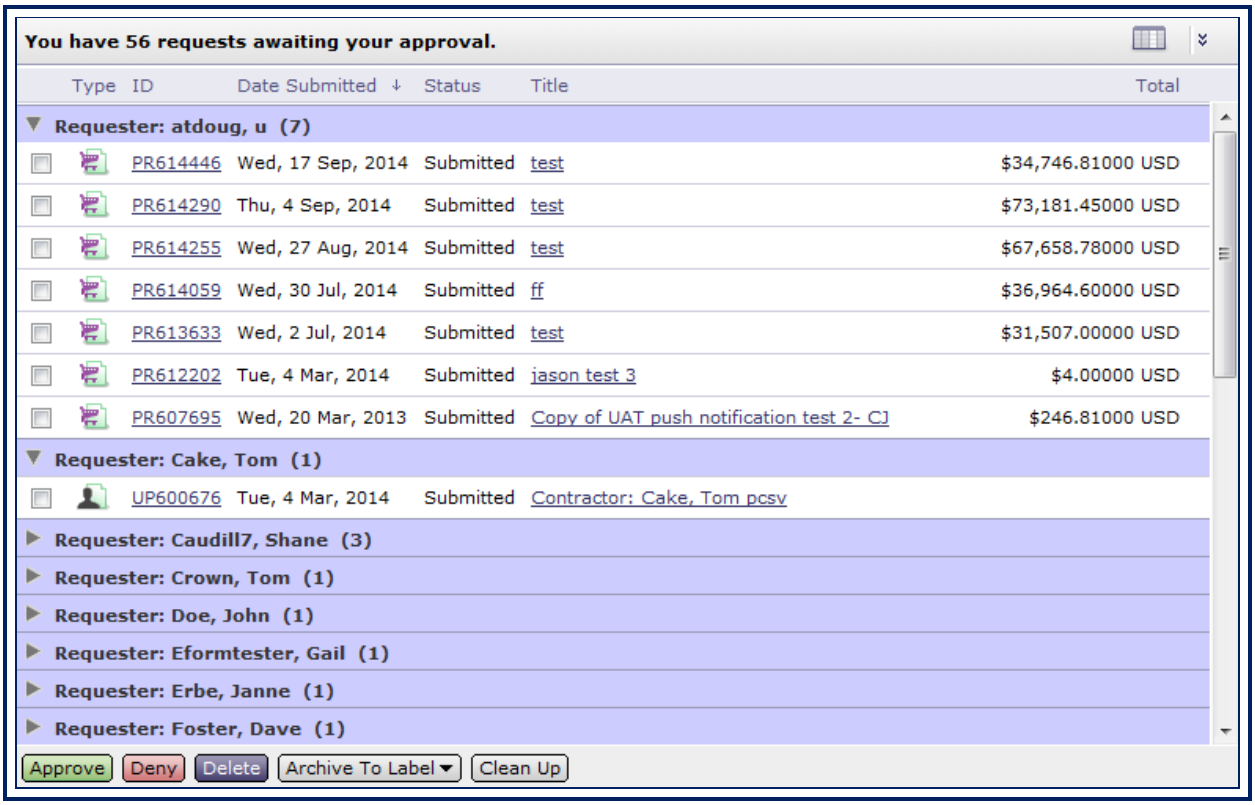


Figure 20: Approval List Options Menu with Grouping Value Selected

C-2, C-3, and C-4 Requisitions Lists

Your active requisitions are displayed in lists grouped by status. This makes it easier to keep track of your work in progress.

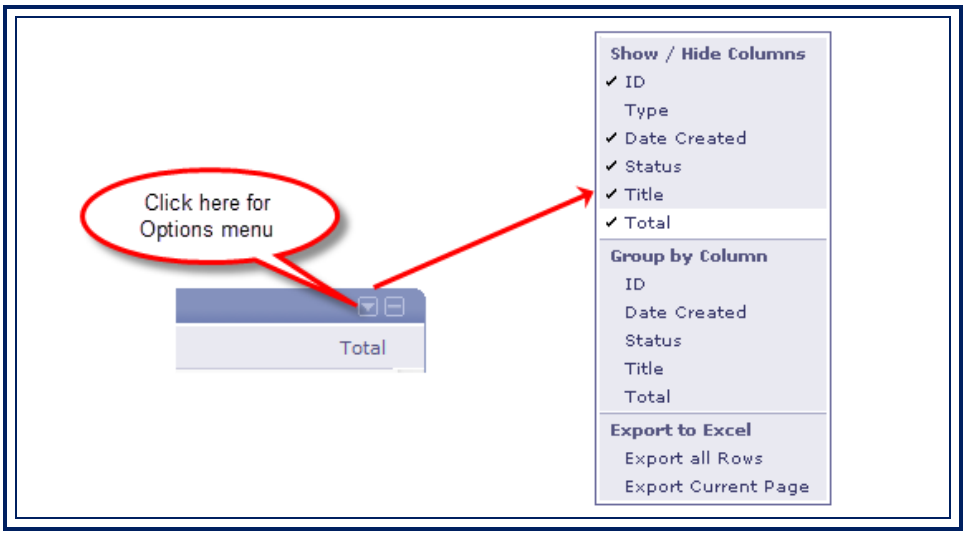
If you have started a requisition but do not want to submit it right away, you can save the partially completed requisition. It will be held in *Composing* status and displayed under **Requisitions – Composing** (C-2).

When you submit a *Composing* requisition for approval, its status changes to *Submitted* and it moves from the **Requisitions – Composing** list to the **Requisitions - Submitted** list (C-3), pending approval.

Requisitions that have been denied will appear under **Requisitions – Denied – This Month** (C-4). Note that this list is based on calendar months, so if one requisition is denied on March 2nd and another is denied on March 25th, both will drop off this list on April 1st.

These three lists can be sorted by any column. In addition, if you click the down arrow in the upper right corner of one of these lists, an options menu opens (**Figure 21**), allowing further customization of the list display. A detailed discussion about using options menus to customize list display can be found in section C-1, To Do List.

Figure 21: Customize Lists with Options Menu



> ***NOTE:*** *Some options menus are accessed by clicking an arrow ( ), while others are accessed by clicking a table icon ( ), but functionality is the same regardless of access point.*

C-5 My Documents

The **My Documents** list contains all of the requests you create, regardless of status, including Quick Quote requests, user profile updates, eForms, and Time Sheets. To see only one type of document, click the View More action link in the lower right corner of the **My Documents** list, and select the desired document type (**Figure 22**).

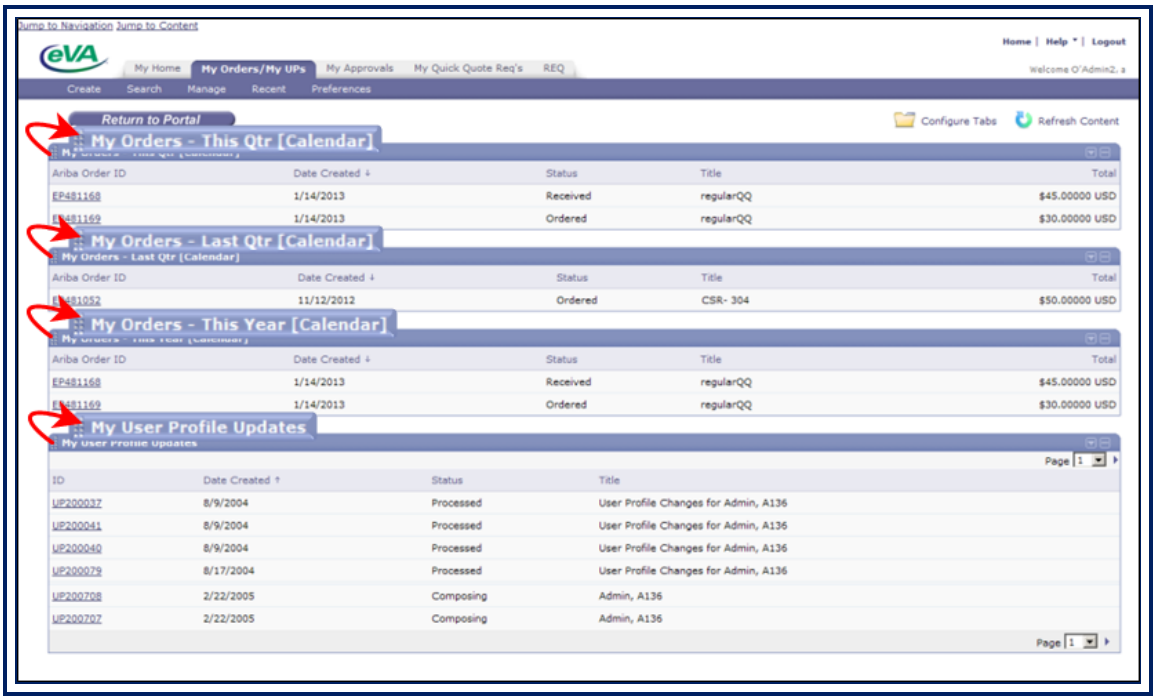
Figure 22: Filter the My Documents List by Document Type

OTHER COMMAND BAR TABS

"MY ORDERS/MY UPS" TAB

This tab displays your orders (requisitions you have submitted and that have been approved) grouped by date, as well as all changes you have made to your User Profile (UP), as shown in **Figure 23**.

Figure 23: The "My Orders/My UPs" Dashboard Tab

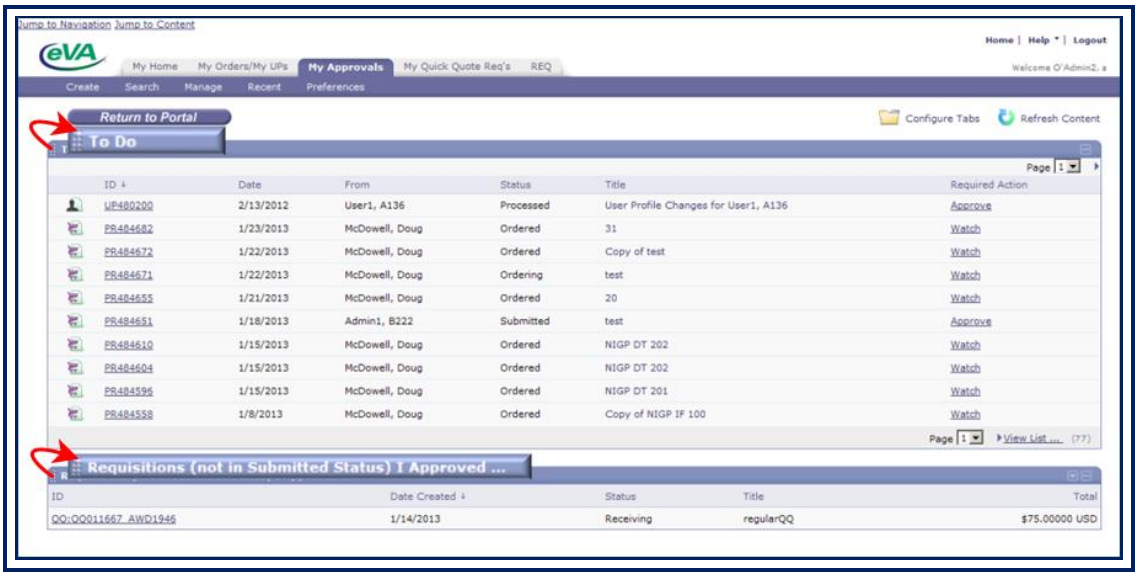


"MY APPROVALS" TAB

The **My Approvals** tab provides a convenient list of the requisitions that are awaiting your approval or for which you are a watcher (**To Do**), and a separate list of requisitions that you have approved but that are not in *Submitted* status, as shown in **Figure 24**. Other documents such as Quick Quote requests, user profiles, eForms, etcetera, also can be accessed from this tab when they are ready for approval.

> ***TIP!*** *If you do not see a request that you know is ready for approval, click the* **Refresh Content** *button, located in the top right corner of the screen, to make sure you are seeing the most up-to-date information.*

Figure 24: The "My Approvals" Dashboard Tab



"MY QUICK QUOTE REQ'S" TAB

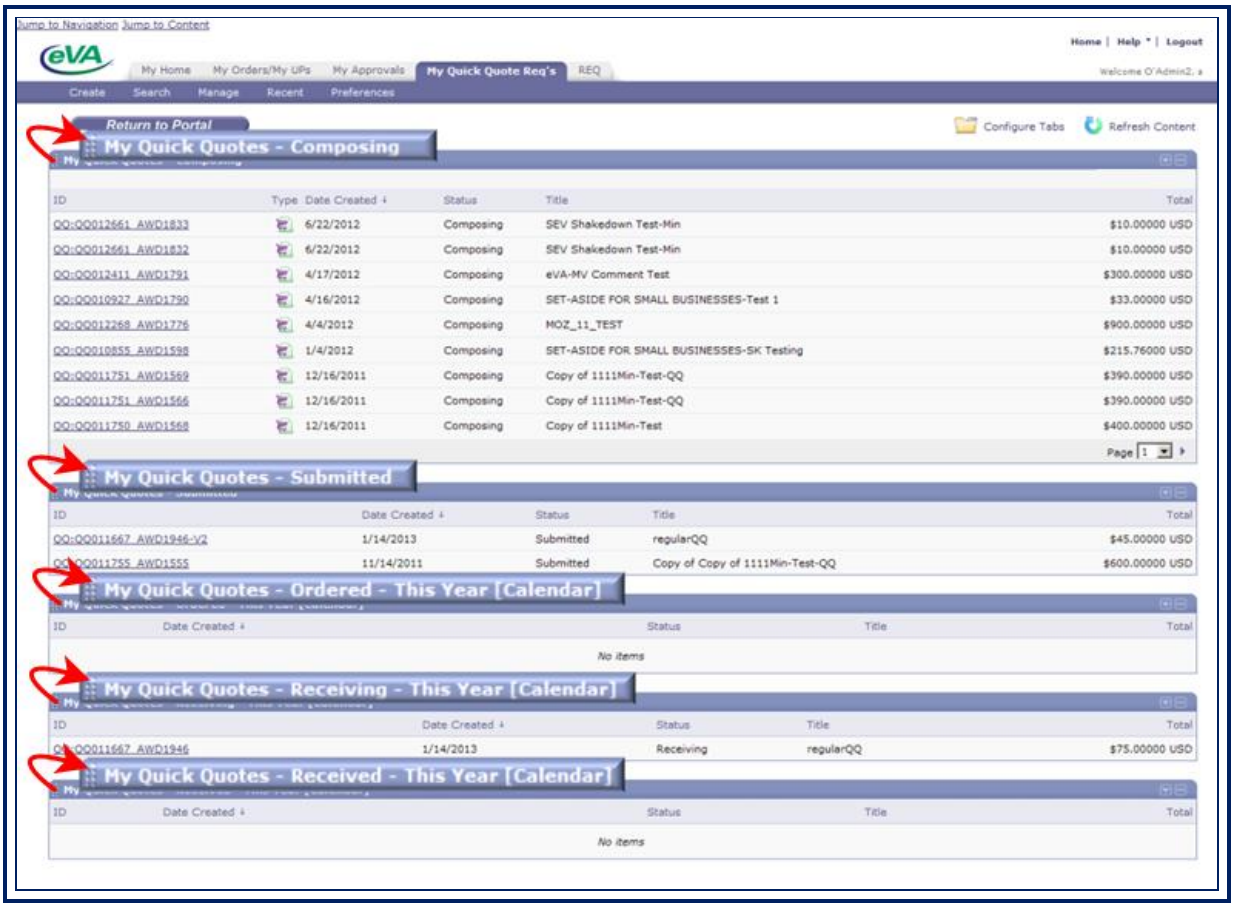
The eMall works in concert with the Quick Quote application. After submitting a vendor award for your Quick Quote, the status of your Quick Quote request changes to *Bids Opened* and an eMall requisition is created, usually within 30 minutes of the award submission.

The eMall uses your **User Profile** values[1] to create the requisition, and assigns a requisition number that includes the Quick Quote Request ID and Award number.

[1] For more information about user profiles, see the *User Management Guide*.

You can track your Quick Quote requisitions from the **DASHBOARD**, where the **My Quick Quote Req's** tab displays your Quick Quote requisitions grouped by status, as shown in **Figure 25.**

Figure 25: Quick Quote Requisitions on the Dashboard



CONFIGURING DASHBOARD TABS

The eMall Dashboard is easily customized using the **Configure Tabs** menu (**Figure 26**). This menu contains two kinds of configuration commands:

- Commands that effect changes on the current tab only, and
- Commands that effect changes on the entire tab set.

This menu lets you control the content that is displayed on each tab, as well as the order in which that content is presented. **Table 5** explains each of the **Configure Tabs** menu options.

Figure 26: Click the "Configure Tabs" Icon to Display Menu

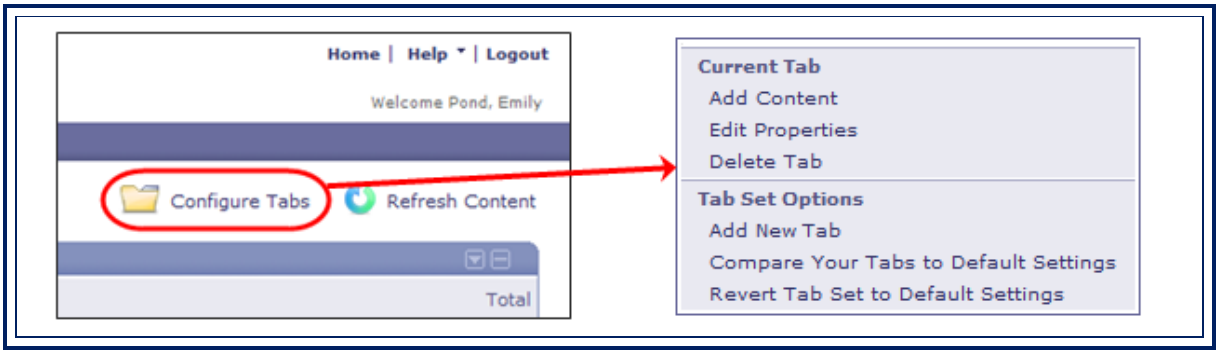
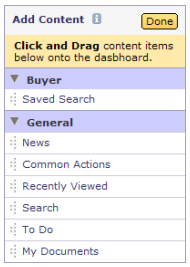
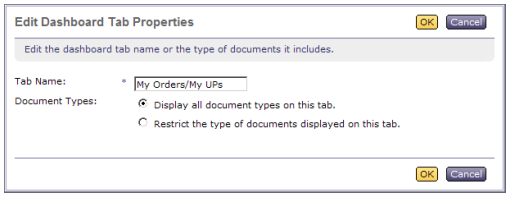
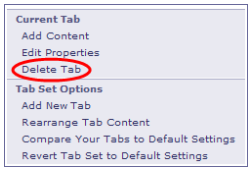
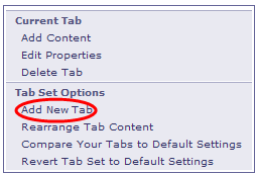
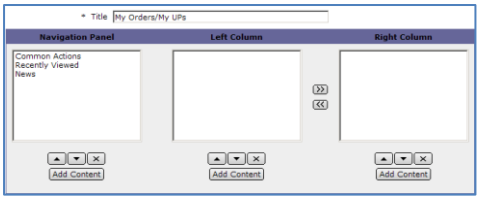
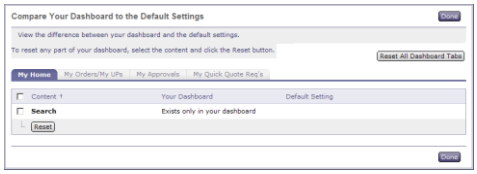
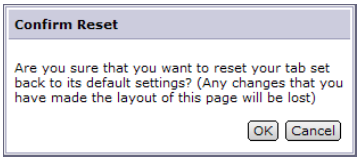


Table 5: Dashboard Configure Tabs Menu

Command	Example	Function
Current Tab		
Add Content		The **Add Content** menu displays a list of available content categories. Select the desired content right on the menu list and drag it onto the dashboard.
Edit Properties		The **Edit Dashboard Tab Properties** dialog box allows you to: • Change the name of the active tab • Determine the document types that will be displayed on that tab
Delete Tab		The *Delete Tab* command causes the active tab to be deleted. **IMPORTANT NOTE:** There is **no** confirmation prompt; the tab will be deleted as soon as you click *Delete Tab*. **This action cannot be undone; you must recreate the tab if you change your mind.**

Command	Example	Function
Tab Set Options		
Add New Tab		Use this command to add a new, blank tab to your dashboard.
Rearrange Tab Content		Click **Rearrange Tab Content** to open a dialog box that allows you to move, add, or delete content from the active tab.
Compare Your Tabs to Default Settings		This command opens a dialog box that allows you to: • Compare your dashboard tabs to the default settings • Restore the default settings on any or all tabs.
Revert Tab Set to Default Settings		When you click the *Revert Tab Set* command, a confirmation prompt is displayed. Click **OK** to return all of your tabs to their default settings, or **Cancel** to retain your changes.

6. CREATING A PURCHASE REQUISITION

This section takes you through the steps for creating a basic requisition. For detailed information about how to find items you need in the eMall and add them to your requisition, see Searching the eMall.

There are two ways to create a new requisition in the eMall (**Figure 27**):

- From any tab on the Command Bar, open the **Create** menu and click *Requisition*; or
- From the **My Home** tab, click *Requisition* in the **Common Actions** window on the left navigation panel.

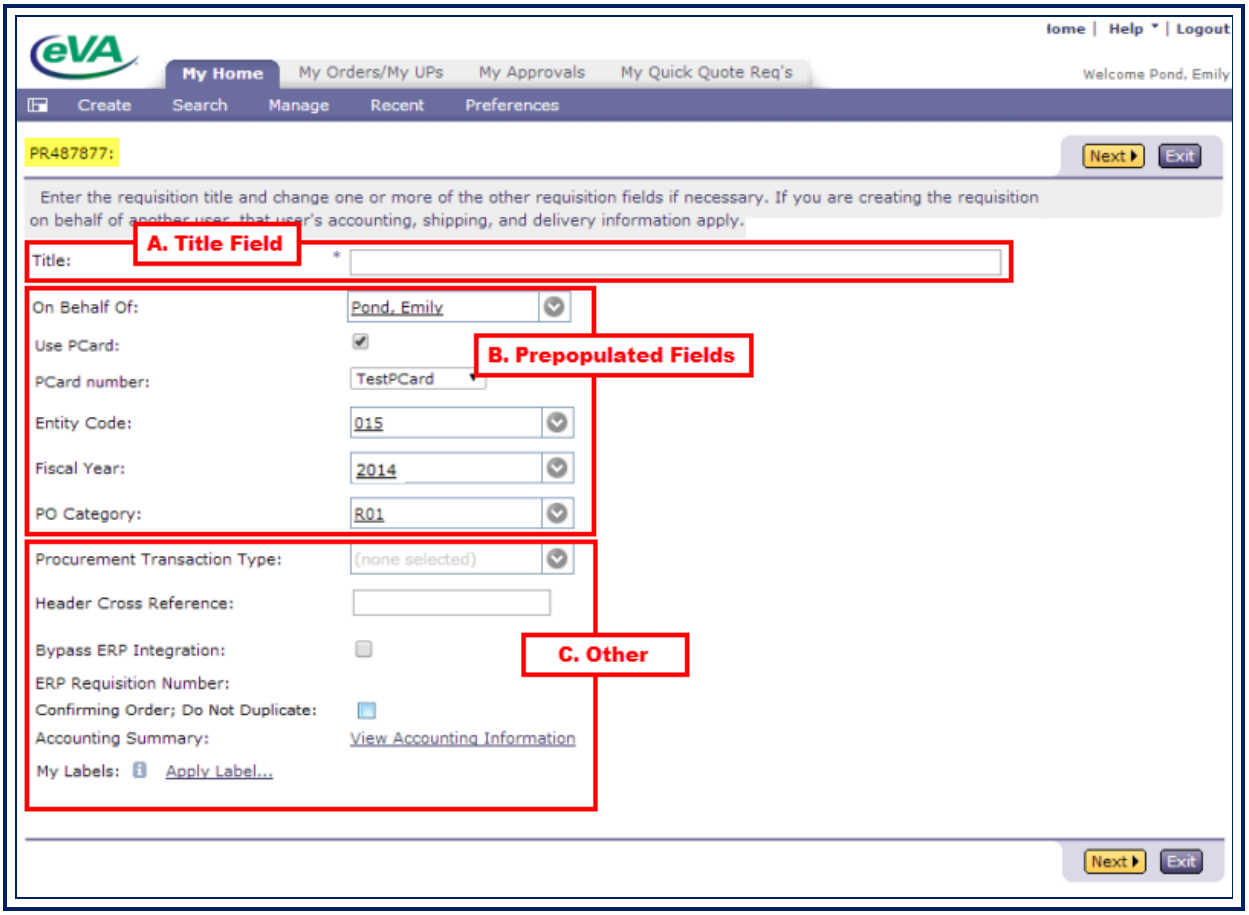
Figure 27: Creating A New Requisition

THE REQUISITION TITLE SCREEN

When you create a new requisition, Ariba assigns a unique **Requisition Number**, which is displayed near the top of the **REQUISITION TITLE** screen (**Figure 28**).

The **REQUISITION TITLE** screen contains a number of data fields. In some of these fields, you will enter appropriate data as needed for each new requisition. Others will have been auto-populated with previously stored data determined by your buysenseOrg (BSO). (BSO refers to the division/department within a client.)

Figure 28: New Requisition with Requisition Number and Auto-populated Fields



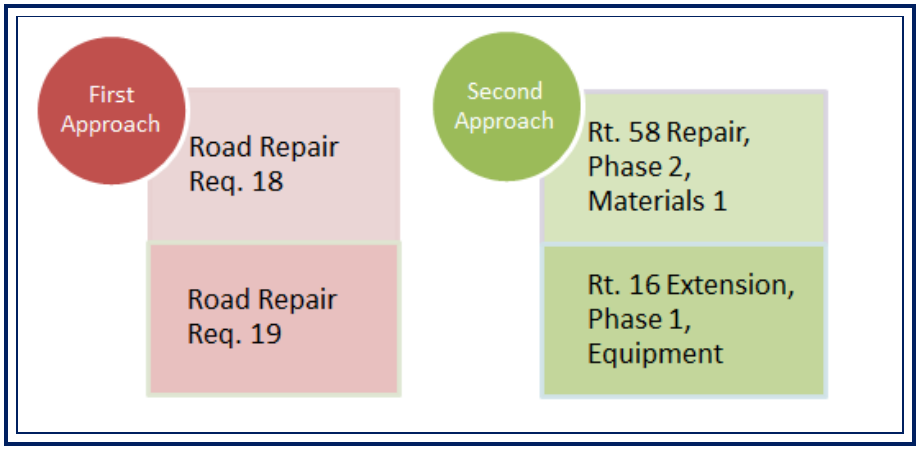
The **REQUISITION TITLE** screen is your starting point for any requisition that originates in the eMall. The sections below provide information about this screen's data fields.

A TITLE (TEXT BOX)

When you create a new requisition, you must give it a title. The title need not be unique, because the Requisition Number is always unique. However, it is a good idea to assign a title that provides some indication of the contents of the request, in case you need to refer to it in the future. Audit and accounting needs aside, the ability to copy an existing requisition and adapt it for a similar project can be a real time saver.

Suppose, for example, that your job is to procure materials and equipment for road maintenance. Now, look at **Figure 29** to see two different approaches to assigning requisition titles.

Figure 29: Assigning Requisition Titles



The first approach to assigning requisition titles virtually guarantees a long and tedious search to find any particular requisition. These titles do not contain any information that can help to differentiate among them; you would have to open each requisition and look at the line items to find the one you want.

The second approach can help to ensure a more positive outcome, because each title contains several searchable terms. You can search by location, type of work, project phase, or procurement type. The few seconds you spend creating a strong title for your requisition will pay dividends when your searches produce fast, reliable results.

B PREPOPULATED FIELDS

If you need to change the data in a prepopulated field, click the down arrow on the drop-down list (**Table 4**) to select or search for a different value.

- **On Behalf Of (Drop-down List)**: When you create a new requisition, your user name will automatically appear in the **On Behalf Of** text box. If you are completing the requisition for someone else, you must change the value in this field to reflect that fact. The screen will automatically refresh, inserting the new Requester's accounting, shipping, and approval flow information. When you submit the requisition, eVA will notify the Requester by email.
- **Use PCard (Check Box)**: If you are approved to use your organization's Purchase Card (AMEX, Visa, or MasterCard), the **Use PCard** check box will be automatically selected. To order without using a PCard, click the **Use PCard** check box to remove the check mark; the resulting order will not contain PCard information.
- **PCard Number (Pick List, Conditional)**: The information in this field is the custom PCard alias information the user set up when entering PCard data. The **PCard Number** pick list is a conditional field. The condition is met when the user whose name appears in the **On Behalf Of** field has access to more than one PCard; otherwise, this field will not be available.

If the **PCard Number** pick list is available when you create a PCard requisition, be sure the appropriate PCard alias is selected.

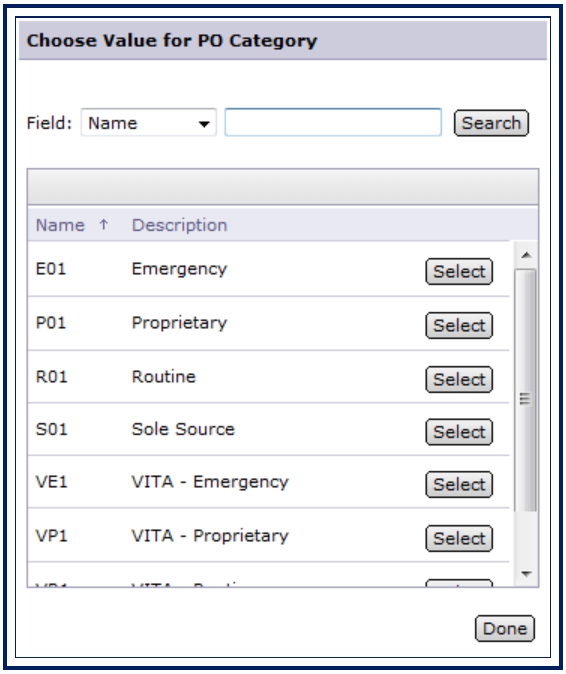
- **Entity/SubEntity Code (Drop-down List):** An Entity Code is a unique ID number that eVA assigns to each agency/entity. It is included with the data stored for each eMall-originated requisition for tracking and reporting purposes. Some organizations track requisitions by department or by subsidiary. Sub-entity codes provide the required level of granularity in these cases.

  When you create a new requisition, all applicable Entity and Sub-entity codes will be available for selection.

- **Fiscal Year (Drop-down List):** The current fiscal year is automatically displayed. Use the drop-down list to choose a different year.

- **PO Category (Drop-down List):** The **PO Category** defines the purchase order type; for example, sole source or proprietary, routine or emergency. If you click the arrow to expand the drop-down list and select *Search for more …,* you will see the complete list of PO Categories. **Figure 30** provides a partial view of that pick list.

Figure 30: PO Category Pick List

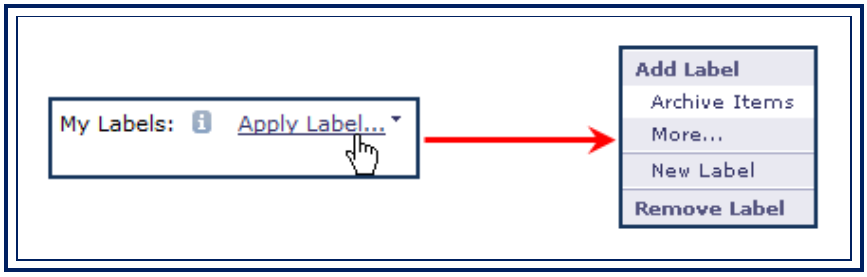


PO Category designations generally end with the numeral 1, as shown above; however, depending on your agency/entity, you might also have access to PO Category X02. The X02 category is used exclusively to identify eVA-excluded procurement transactions and non-procurement (payment) transactions that have been created in eVA. Use of the X02 category allows the agency to report, track, and analyze all its transactions in one place. eVA orders that carry the X02 designation will be exempt from eVA agency and vendor transaction fees.

C OTHER

- **Procurement Transaction Type (Drop-down List):** Choose the value that best represents the category of goods or services you are requesting. Click *Search for more…* from the **Procurement Transaction Type** drop-down list to see a dialog box that displays the value and the description of each transaction type.
- **Header Cross-Reference (Text Box):** If your agency/entity assigns its own requisition number, this field can be used to display that number. (This field is used at the discretion of each agency/entity.)
- **Bypass ERP Integration (Check Box):** This check box is used only by agencies/entities that are set up for Integration. Users can check this box to bypass the agency's ERP system, but only under specific circumstances..
- **ERP Requisition Number (Text Box):** Agencies/entities that use ERPs can choose to display the ERP requisition number in this field on orders imported into eVA.
- **Confirming Order; Do Not Duplicate (Text Box):** When selected, a message that reads "Confirming Order – Do Not Duplicate" is added to the **Comments** box.
- **Accounting Summary: View Accounting Information (Link):** Click this link to access a read-only accounting information summary for the requisition. The summary will display only after items are entered on the requisition.
- **My Labels:** You can add labels when you create or edit a requisition. Labels provide additional means of locating a specific document or group of documents when you conduct a system search. Click the Apply Label link to select an existing label or create a new one (**Figure 31**).

Figure 31: Add or Remove Labels



***WHEN** you have added all necessary information on this screen, click **Next** to continue.*

ADDING ITEMS

This section explains how to add items to your shopping cart from the various sources available to you. If you need detailed instructions on how to search for items, see Section 7, Searching the eMall. There are several ways to add items to a requisition:

- Select from one of the many supplier-provided catalogs.
- Enter an item as a non-catalog item (not selected from an electronic catalog).
- Select an item that you previously saved as a favorite.
- Select an item from a search that you have saved.

> ***TIP:*** After items have been added to your shopping cart, *you can select the Shopping Cart link or icon* *to view a summary of the shopping cart contents*.

ADDING CATALOG ITEMS

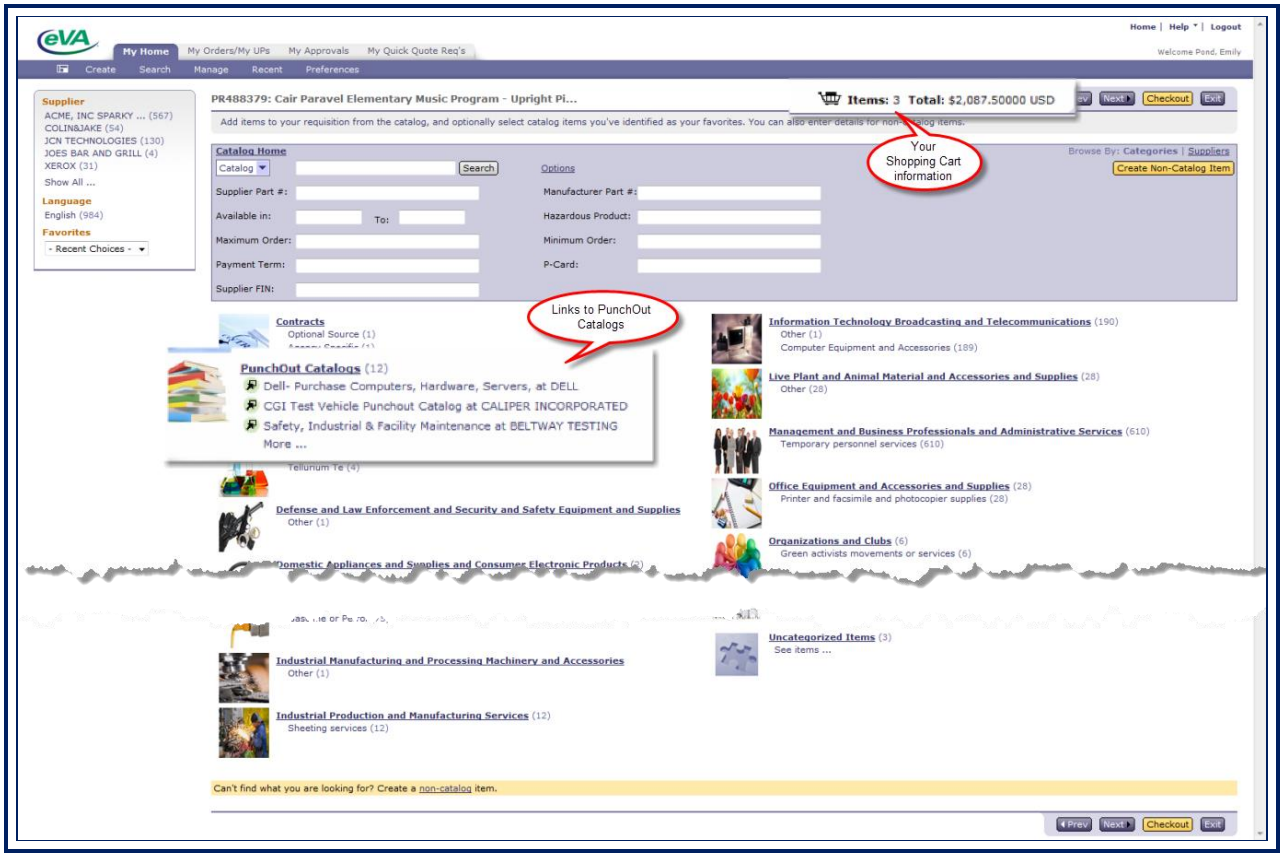
There are two types of eVA catalogs: hosted and PunchOut.

- A hosted catalog, in the context of the eMall, is one that is "built in" to the eMall. In addition to the item details that are returned with the results list, each item from a hosted catalog displays an **Add to Cart** button.
- A PunchOut catalog makes it possible for you to access the supplier's own on-line catalog to find and select items while the eMall keeps track of what you are doing and produces the actual requisition.

Both can be accessed from the **CATALOG HOME** screen (**Figure 32**). The procedure for adding an item to your requisition depends on whether the item is from a hosted catalog or a PunchOut catalog.

Not all vendors have catalogs. If you search by vendor and no results are returned (and you have checked the spelling), it means that vendor does not have a catalog.

Figure 32: Catalog Home Screen



When you search for an item, the eMall returns a list of items that match your search terms (the "results list"). The results list displays the name of the supplier for each item, along with the description, price, SWaM qualification, availability, and other details.

Figure 33 shows typical search results, where the search term 'printer' returns items from both hosted and PunchOut catalogs. **Figure 33** also shows the standard display options, indicated by the red arrow. Using these options, you can control:

- How many results are displayed per page (20, 50, or 100).
- The sort order for your results (by Relevance, Price, Bestselling, or Name).
- The view (details as shown in **Figure 33**, or thumbnails as shown in **Figure 34**).

You will find the same display options in your shopping cart and **Favorites** folders.

Figure 33: Search Results – List View

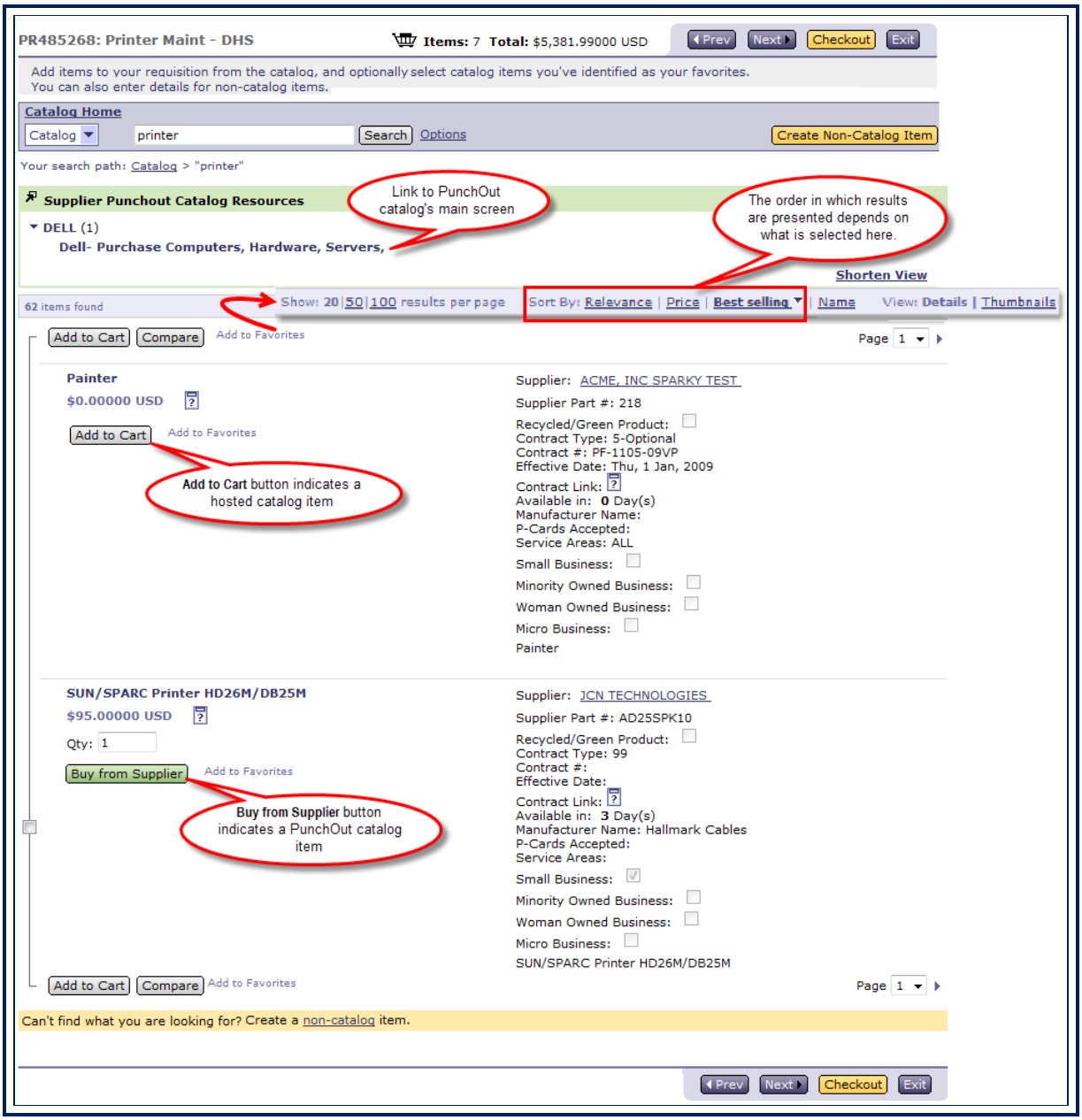
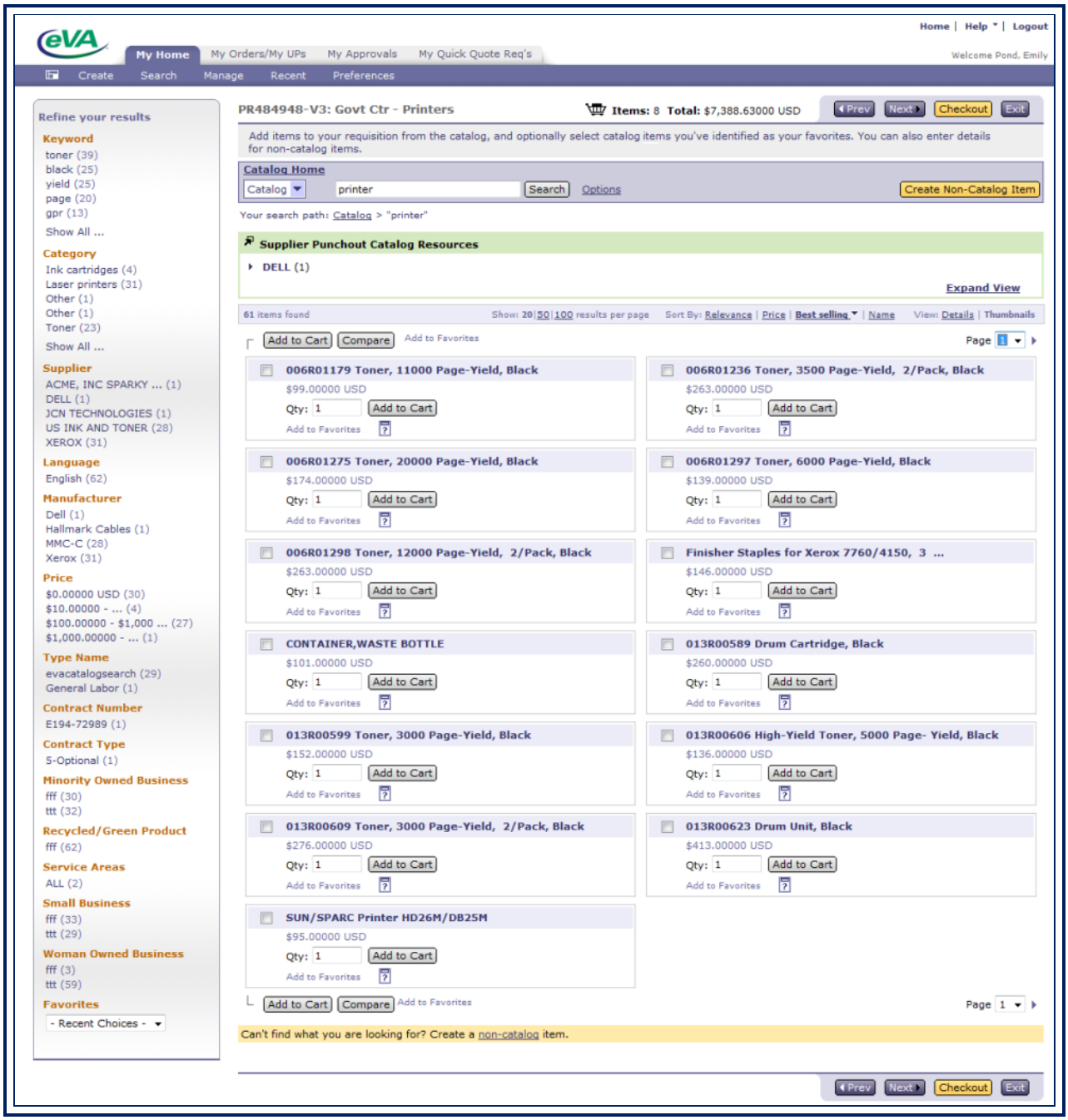


Figure 34: Search Results – Thumbnail View



Hosted Catalogs

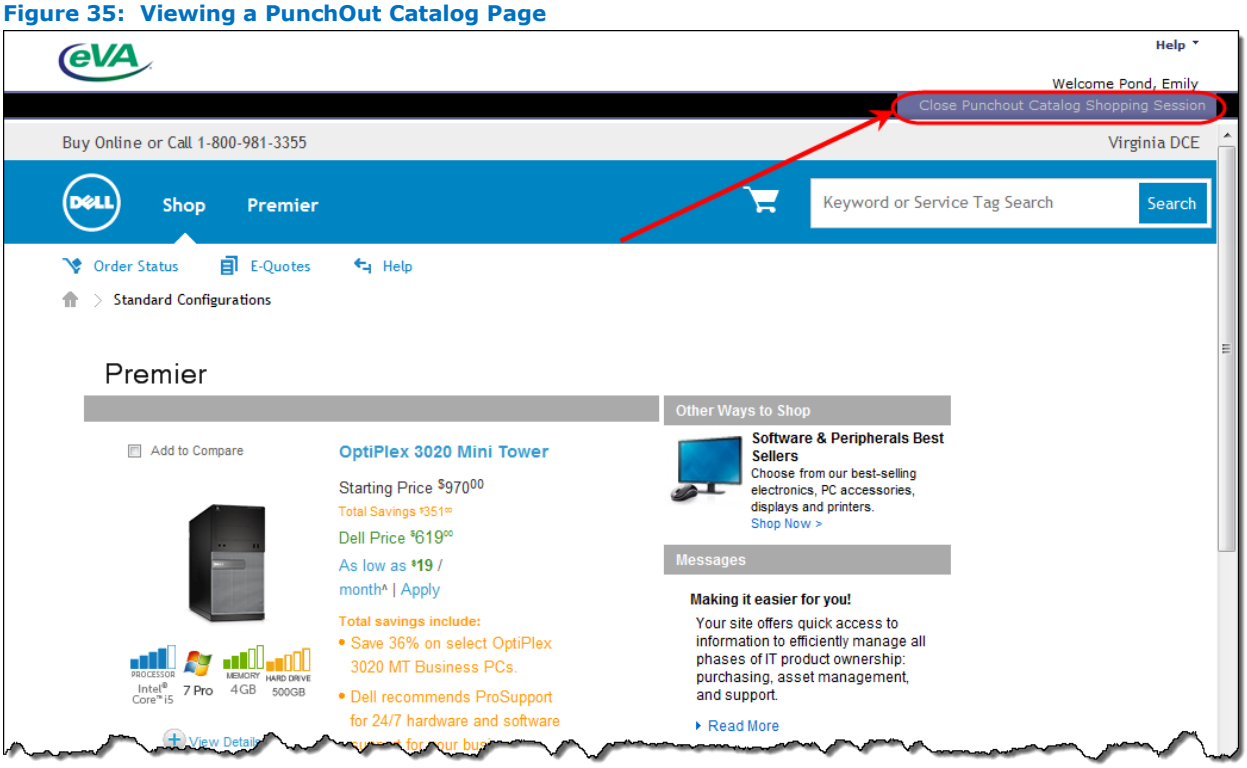
Click the **Add to Cart** button next to an item to place it in your shopping cart. If, after placing the item in your shopping cart, you need to modify your selection, you can make changes to hosted catalog items right in your eMall shopping cart.

PunchOut Catalogs

Use the PunchOut catalog links on the **CATALOG HOME** screen (**Figure 32**) to navigate to a PunchOut catalog, or click the **Buy from Supplier** button next to the item you want in the search results list (**Figure 33**).

When you access a PunchOut catalog, the eVA logo is present in the upper left corner of your screen, and your user name appears in the upper right corner. Everything else you see on the screen is presented by the supplier (**Figure 35**).

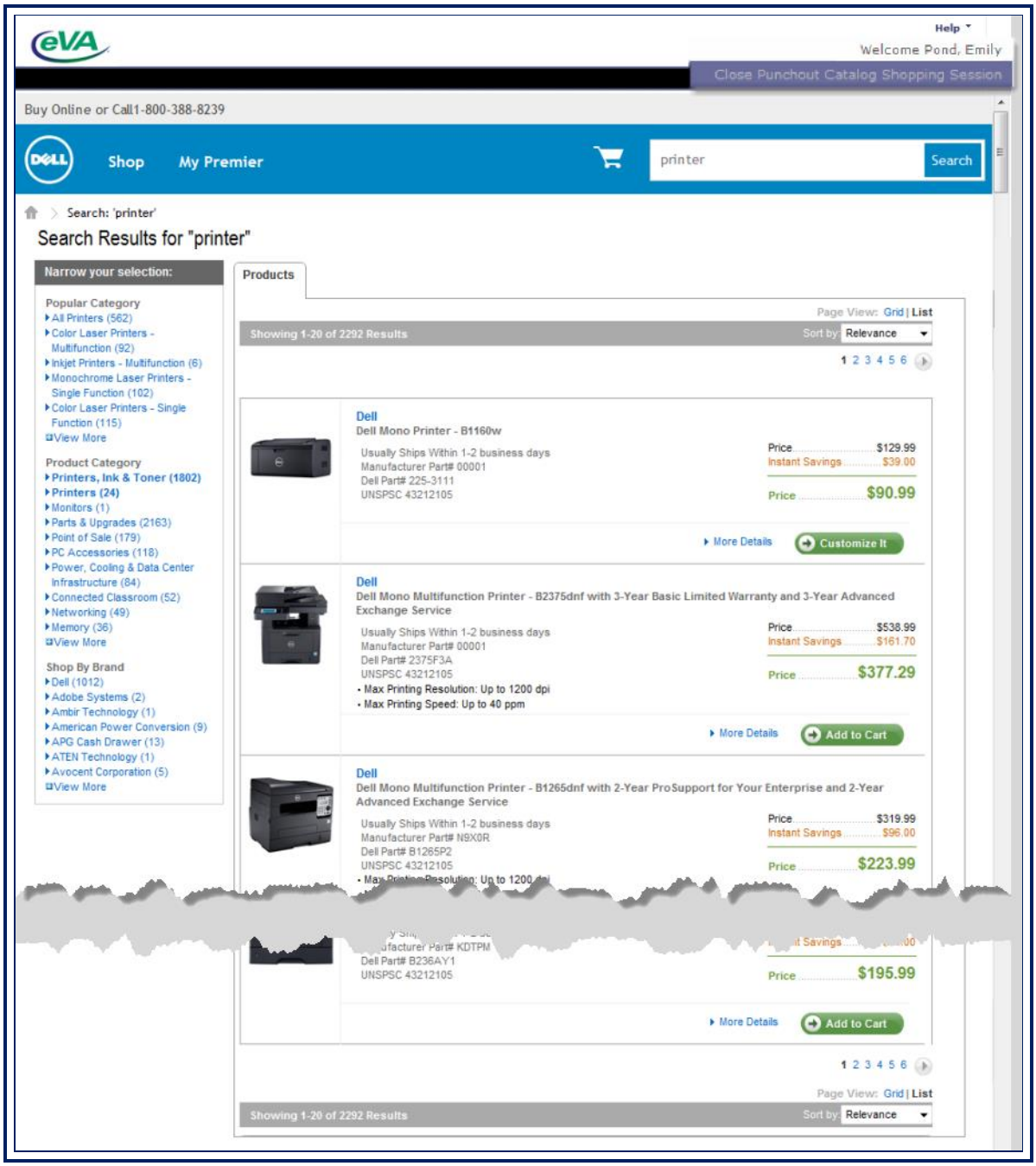
Figure 35: Viewing a PunchOut Catalog Page



Search for items in the PunchOut catalog and add them to your shopping cart, just as you would on any internet shopping site. If you decide not to make a purchase, you can return to the eMall at any time by clicking the Close Punchout Catalog Shopping Session link in the upper left corner of the screen.

> ***WARNING!*** *Although it might appear that you are creating your order at the supplier's website, the supplier* ***will not*** *receive an order until you complete and submit the eVA eMall requisition and obtain any necessary approvals.*

Figure 36: Search Results List in a PunchOut Catalog



After making your selections, go through the checkout procedures at the PunchOut catalog website. Because PunchOut catalog websites belong to the suppliers, checkout procedures may vary somewhat from one to another.

When you finish checking out (for example, by clicking the **Create Order Requisition** button as shown in **Figure 37**), the items from the PunchOut catalog will automatically populate your eMall shopping cart.

Figure 37: PunchOut Catalog Shopping Cart

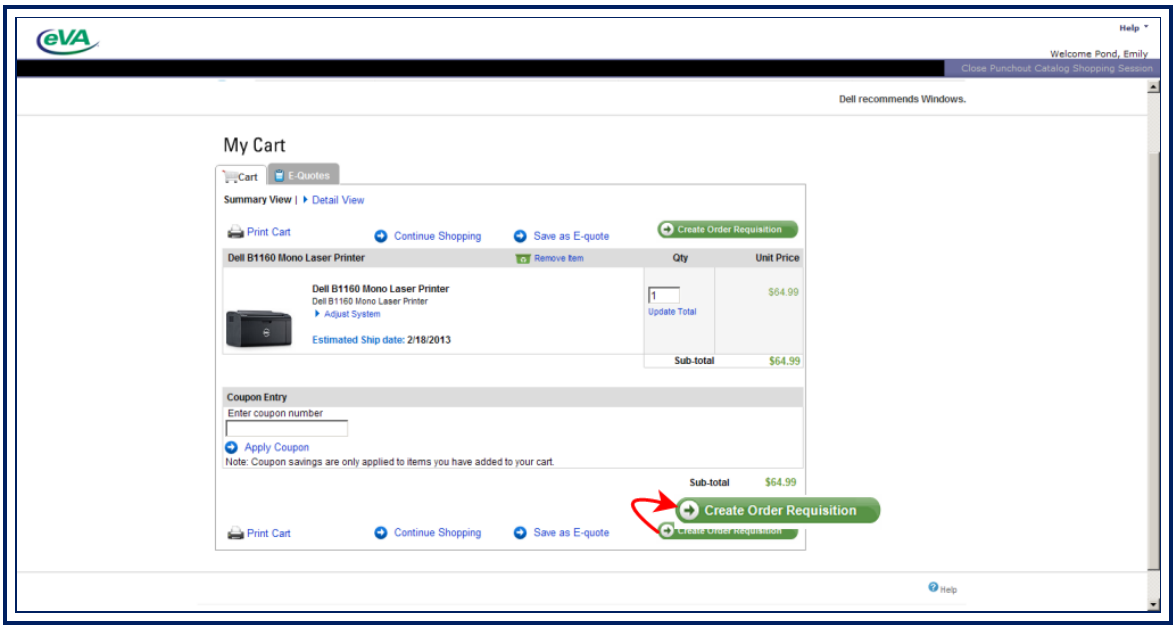
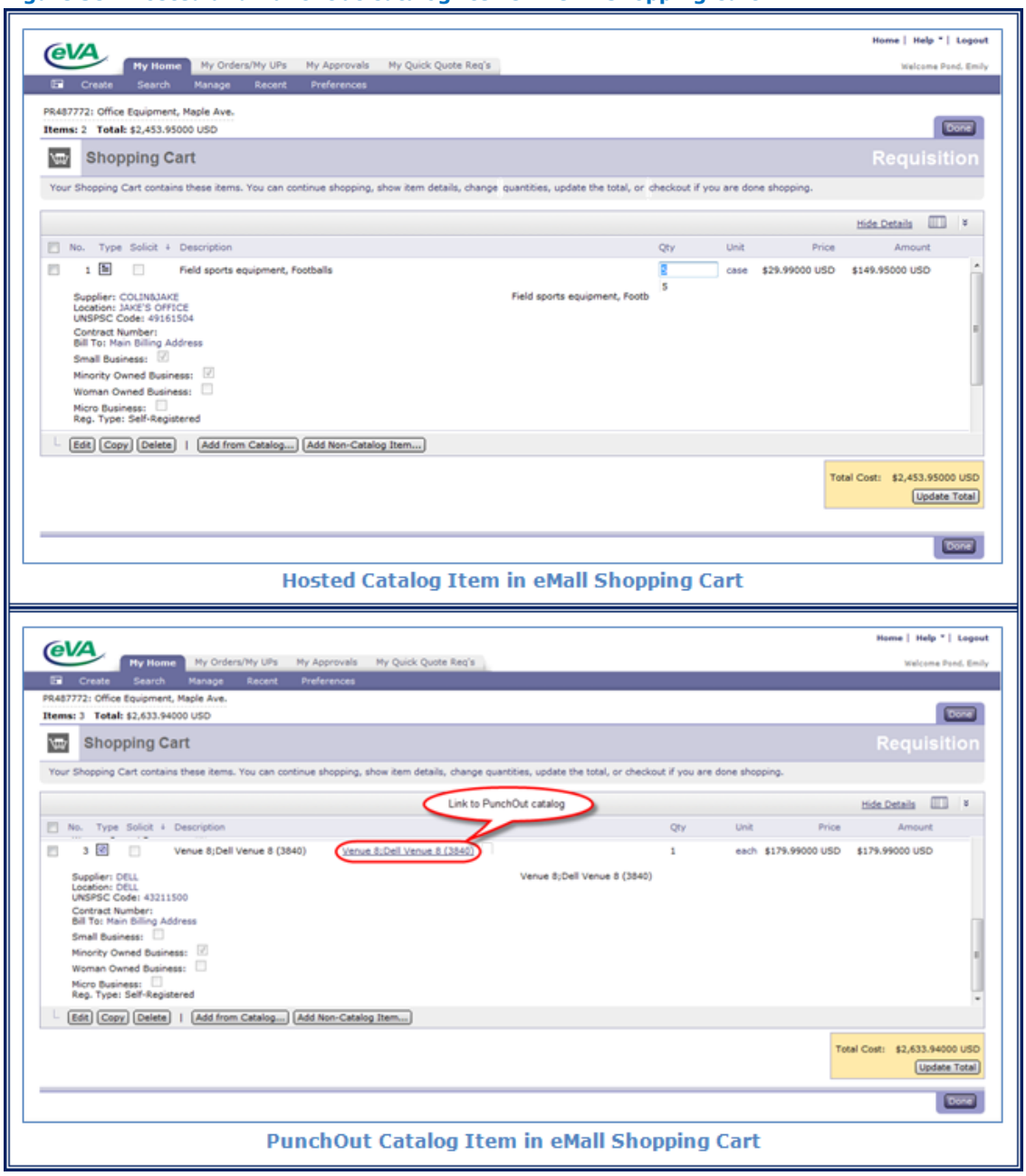


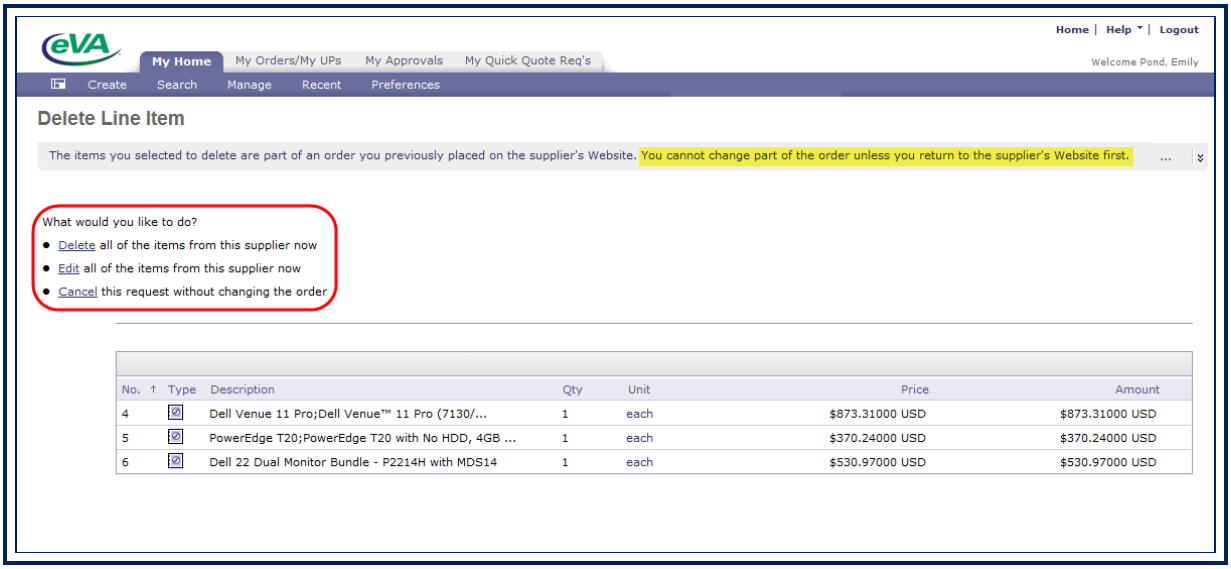
Figure 38 compares a hosted catalog item in your eVA shopping cart to a PunchOut catalog item. The PunchOut catalog item includes a link back to its listing in the PunchOut catalog. This is because, with one exception, you cannot make adjustments to a PunchOut catalog item in the eMall. Instead, you must use the provided link to return to the PunchOut catalog in order to make any necessary changes (such as quantity or features).

Figure 38: Hosted and PunchOut Catalog Items in eVA Shopping Cart



The exception noted above applies to deletions. You can delete PunchOut catalog items directly from your eMall shopping cart, provided you delete all items selected from the same PunchOut catalog. If you try to delete fewer than all of the line items from a PunchOut catalog, you will see an error message, along with a list of possible actions (**Figure 39**).

Figure 39: Error Message and Options for Deleting PunchOut Catalog Items



ADDING NON-CATALOG ITEMS

If you need an article or service that is not found in a catalog, you can enter a non-catalog request.

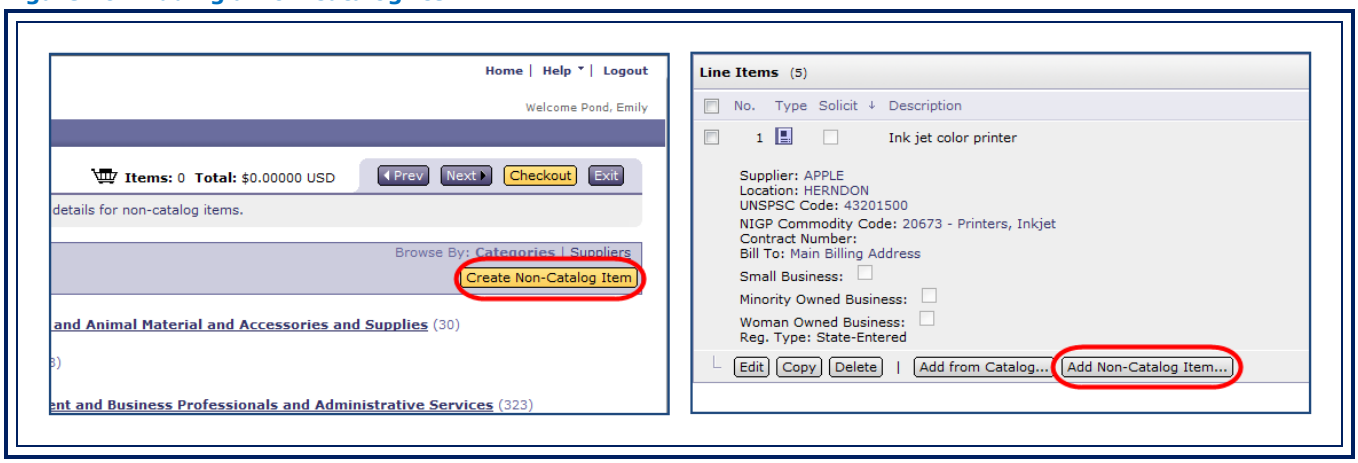
Creating a Non-Catalog Item

You might need to create a non-catalog item if:

- None of the existing catalogs offer the item you want to purchase, or
- You want to purchase the item from a specific supplier who does not have a catalog or is non-registered.

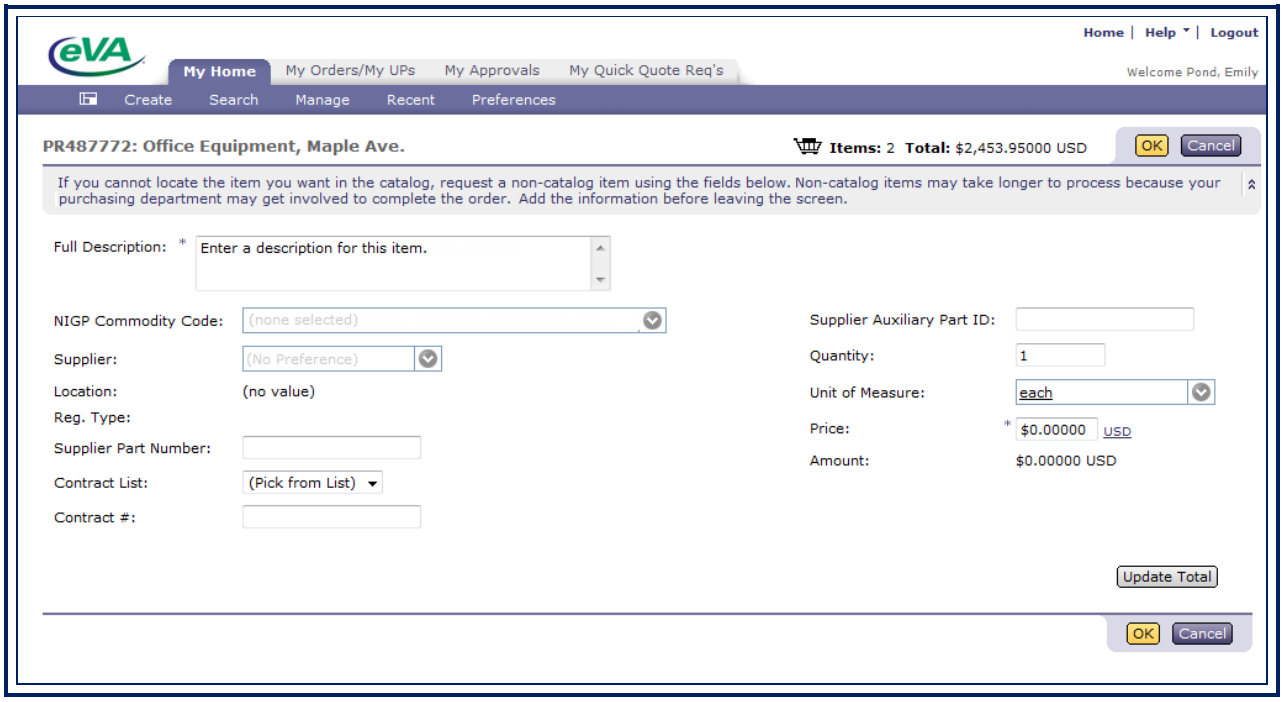
Access the screens to add a non-catalog item from the **CATALOG HOME** screen or, if you are adding items to a requisition in *Composing* status, from the bottom of the **Line Item** frame (**Figure 40**).

Figure 40: Adding a Non-Catalog Item



The **NON-CATALOG ITEM INFORMATION** screen will open (**Figure 41**).

Figure 41: Entering Data for a Non-Catalog Item



Enter details for the item you are requesting, as described in **Table 6.**

Table 6: Add Non-Catalog Item Screen Fields

Field	When and How to Use
Full Description	• Remove the text in the **Full Description** box and enter a detailed description for the product you are purchasing. • This is a required field.

NIGP Commodity Code	• Select a commodity description for your product from the Commodity Code drop-down list.
	• If the code you want is not on the list, select Search for more.
	  ○ When the **COMMODITY CODE SEARCH** screen opens, enter a description for your item and click **Search**.
	  ○ Click the **Select** button that appears beside the item you are purchasing to pull the correct code into the **NIGP Commodity Code** field.

Supplier	• If the supplier you want does not appear in the **Supplier** drop-down list, click *Search for more*. Follow the instructions for selecting a supplier, below.
Location	• This field will sometimes automatically populate when you select the supplier. • If it does not, you can use the *Search for more* feature on the **Location** drop-down list.
Registration Type	• This read-only field will automatically populate when you select the desired supplier.
Supplier Part Number	• If you know or can find out the supplier-assigned part number for your item, enter it here.
Contract List	• If the selected vendor has a contract, you will be asked to select the appropriate contract number. If it is not available, select *Item on contract but number not in list*.
Contract #	• If the item is on a contract but the contract number does not appear in the drop-down list, enter the contract number here. • If you selected *Not on contract* from the **Contract List** drop-down, the **Contract #** field will not be available.
Supplier Auxiliary Part ID	• Most users do not use this field, but it is available for those who do.
Quantity	• Enter the quantity you want to purchase. • This field defaults to *1*.
Unit of Measure	• Use the drop-down list to select the unit of measure that applies to your item. • This field defaults to *each*.
Price	• Enter the price per unit of measure. • The default currency is U.S. dollars.
Amount	• Click **Update Total** to populate this field. The price will be multiplied by the quantity, and the total cost will be displayed in this field.

If you are purchasing a service, remember that the **Quantity**, **Unit of Measure**, and **Price** data you enter must accurately reflect the way that service will actually be received and paid for. The example below shows two different approaches to procuring a specific service.

Example: Determine How to Enter Data When Purchasing a Service

You need to purchase a year of elevator maintenance service at the rate of $2,400 a year.

If you will be paying for the service ***at the end of the contract***, you would insert

- ***1*** as the quantity
- ***Year*** as the Unit of Measure
- ***$2,400*** as the price

If you will be paying for the service ***in monthly installments***, you would insert

- ***12*** as the quantity
- ***Month*** as the Unit of Measure
- ***$200*** ($2,400 divided by 12 months) as the price

After you enter the details for your non-catalog item, click **OK** to add the item to your requisition and return to the main **REQUISITION** screen, where the new, non-catalog item will be visible in the **Line Items** window.

Selecting a Supplier

The eMall allows three kinds of suppliers (also referred to as *vendors*):

A **Self-registered** supplier has executed a comprehensive registration process and has full access to all of the features the eMall offers to sellers. Only self-registered suppliers (or suppliers who have at least one self-registered location) can display catalog items.

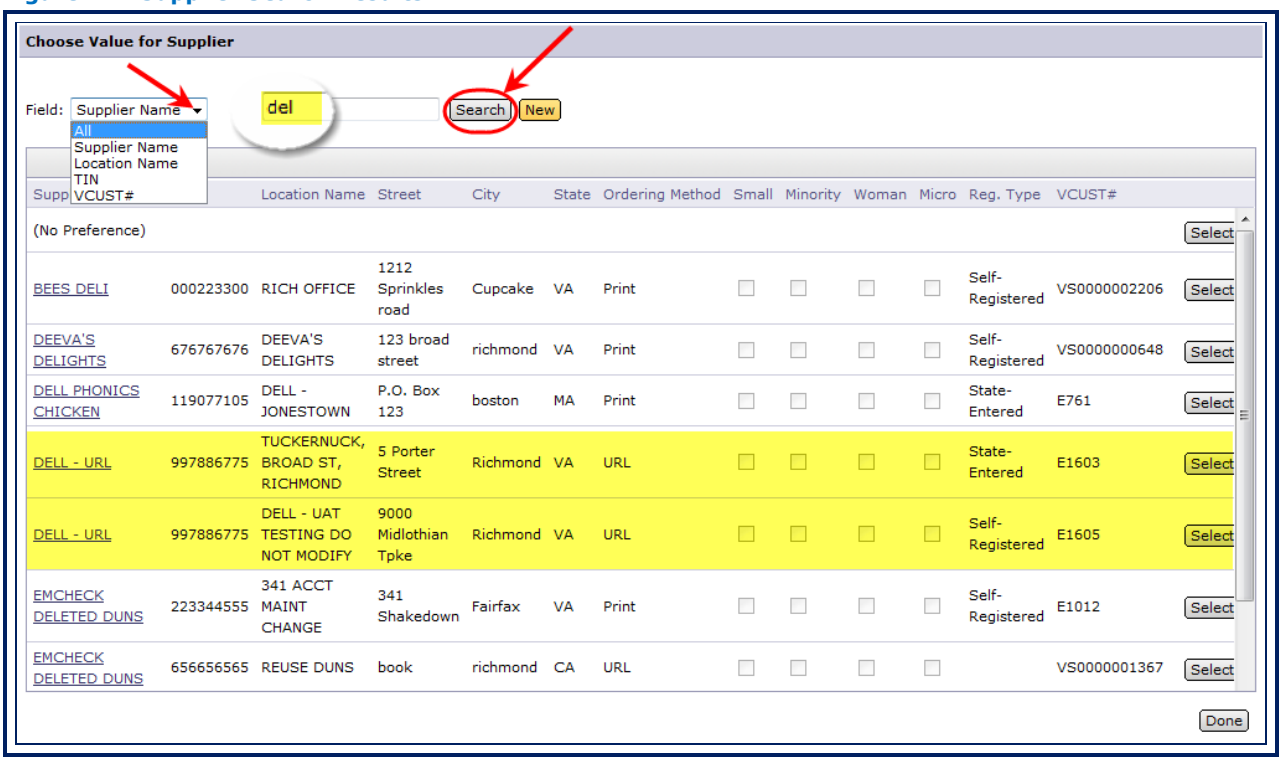
A **State-entered** supplier has been added by an authorized COVA-entity user and has a more limited presence in the eMall. A state-entered supplier cannot publish catalog items; however, a buyer can search for and select a state-entered supplier and can access location and contact information.

An **Ad Hoc** supplier is an unregistered supplier that a buyer has manually added for the purpose of fulfilling one specific order. The ad hoc supplier is associated with a particular order. It will not be available to be selected for other orders .

WARNING! *Your agency/organization is liable for the vendor transaction fee if you use an unregistered or state-entered supplier for your eVA purchase orders.*

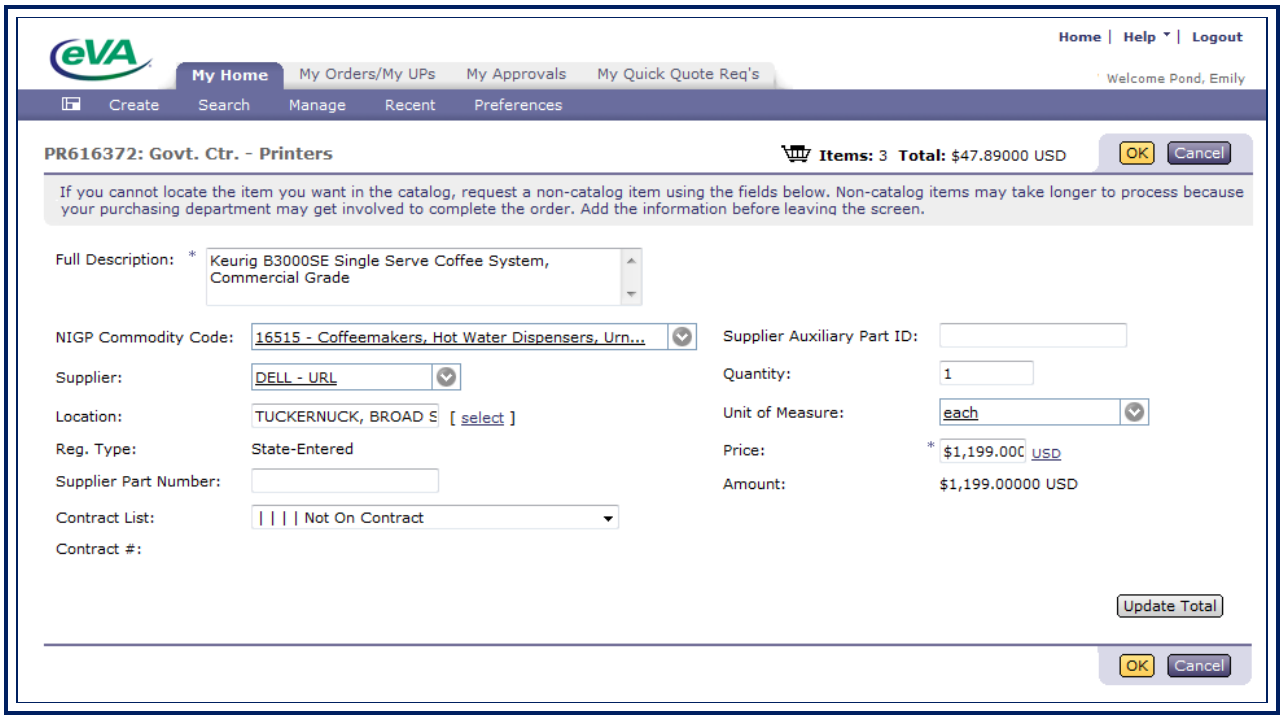
On the **NON-CATALOG ITEM** screen, use the **Supplier** drop-down list to select or search for a supplier.

Figure 42: Supplier Search Results



Choose the supplier you want from the search results by clicking the corresponding **Select** button. Your selection will be entered in the **Supplier** field for the Non-Catalog item. As shown in **Figure 42**, supplier search results display one row for each of a given supplier's locations; be sure to select the location you prefer.

Figure 43: Add Non-Catalog Item Screen – Completed



After selecting a supplier, complete the **ADD NON-CATALOG ITEM** screen as described in **Table 6** and click **OK**. The non-catalog item you created will appear as a line item on your requisition and can be viewed in your shopping cart.

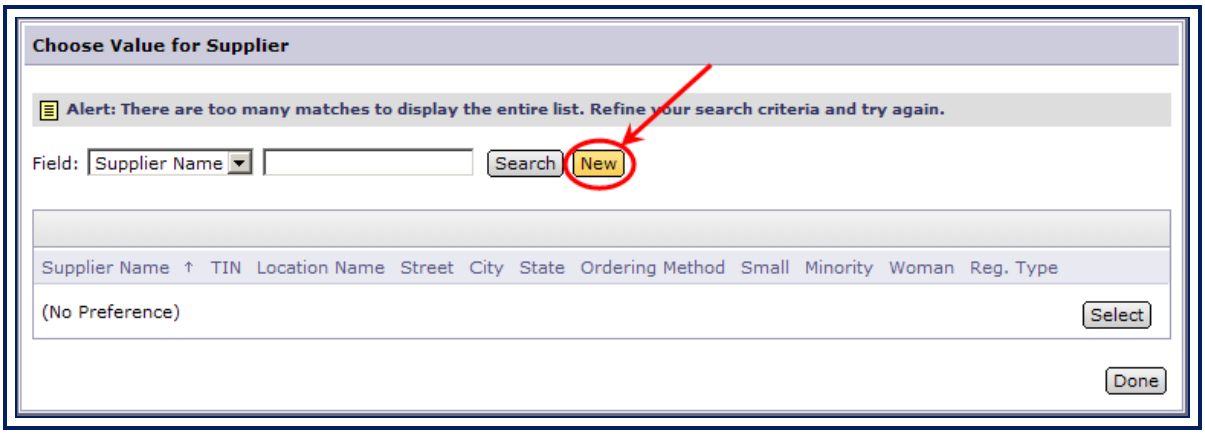
Adding a New Supplier

If the supplier you want to use is not registered in eVA, you can add a new supplier ***for the current requisition only.*** However, before concluding that the supplier you want is not registered, try different spellings and any alternate names you can think of to avoid possible transaction fees for using an unregistered vendor.

> ***REMEMBER**: Use with caution! To avoid unnecessary charges, exercise all search possibilities before entering a vendor as a 'New' vendor.*

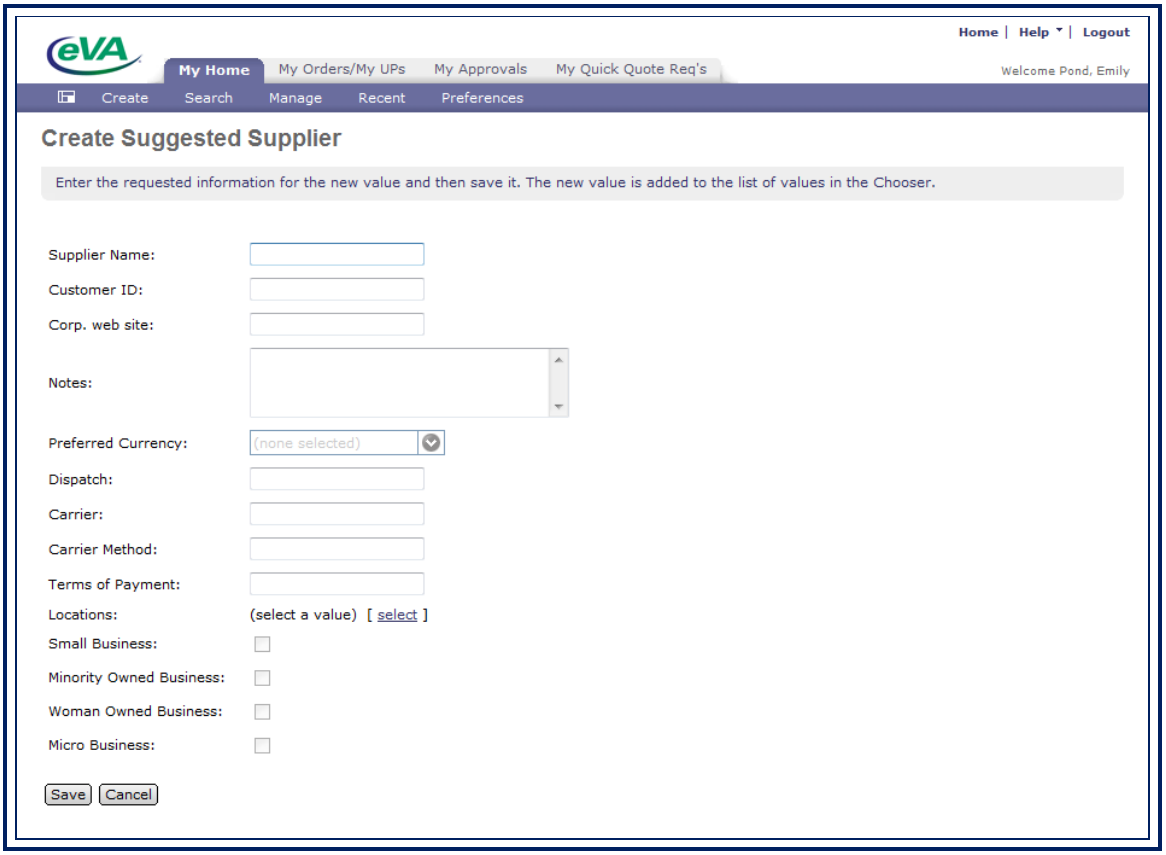
1. On the **ADD NON-CATALOG ITEM** screen, expand the **Supplier** drop-down list and select *Search for more …* to open the ***CHOOSE VALUE FOR SUPPLIER*** dialog.
2. Click **New** (**Figure 44**) to launch the **CREATE SUGGESTED SUPPLIER** screen.

Figure 44: Click "New" to Add a Supplier



The **CREATE SUGGESTED SUPPLIER** screen will open (**Figure 45**).

Figure 45: Complete to Add a Non-Registered Supplier



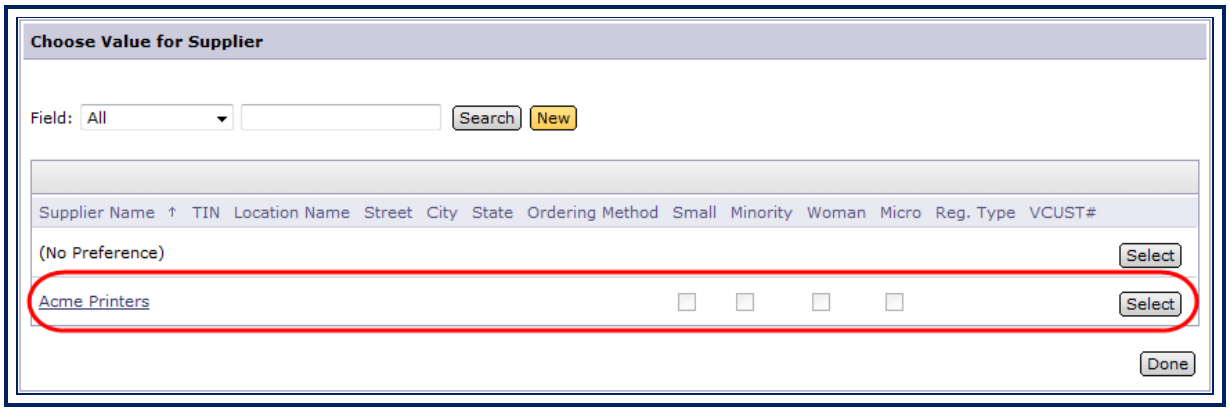
Enter the requested information as shown in **Table 7**. Note that only the Supplier Name is required; all other fields are optional.

Table 7: Create Suggested Supplier Screen Fields

Field	When and How to Use
Supplier Name	• Enter the full, legal name of the supplier. (This is the only required field.)
Customer ID	• This field is not currently in use.
Corp. web site	• This field is not currently in use.
Notes	• This field is not currently in use.
Preferred Currency	• This field is not currently in use.
Dispatch	• This field is not currently in use.
Carrier	• This field is not currently in use.
Carrier Method	• This field is not currently in use.
Terms of Payment	• This field is not currently in use.
Locations	This field is not currently in use. After you save the new supplier data and associate the new supplier to the item, you can add a location from the **ADD NON-CATALOG ITEM** screen (**Figure 43**).
Small Business	• This field cannot be completed by the user.
Minority Owned Business	• This field cannot be completed by the user.
Woman Owned Business	• This field cannot be completed by the user.
Micro Business	• This field cannot be completed by the user.

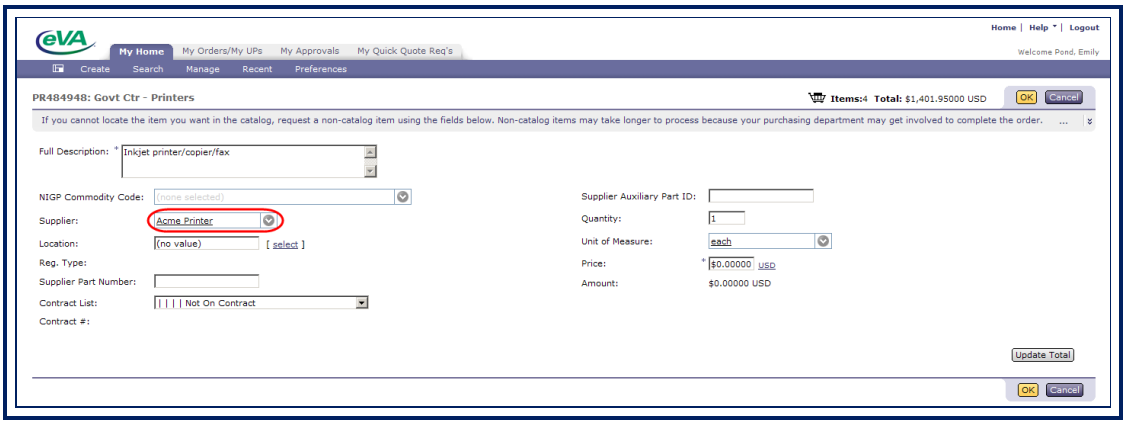
After you enter the new supplier information, click **Save**. You will be returned to the ***CHOOSE VALUE FOR SUPPLIER*** dialog box, where the name of the supplier you entered will be available for selection (**Figure 46**).

Figure 46: New Supplier Available for Selection



Click the corresponding **Select** button to choose the new supplier and return to the **ADD NON-CATALOG ITEM** screen, where your new supplier will be displayed in the **Supplier Name** field (**Figure 47**).

Figure 47: New Supplier Selected

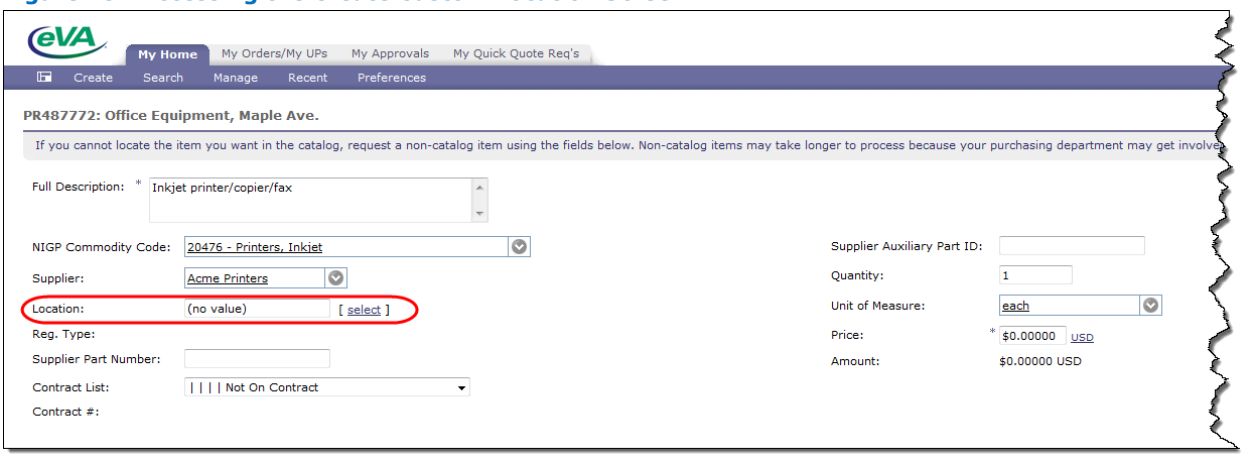


Adding an Ordering Location

You can add an ordering location to any supplier by completing the **CREATE CUSTOM LOCATION** screen. However, if you are using a *registered* supplier (self-registered or state-entered), and you want to order from a location that is not on the **Location** pick list, it is better to contact the supplier and ask them to add the location than to add it yourself. (See About Unregistered Suppliers for more information.)

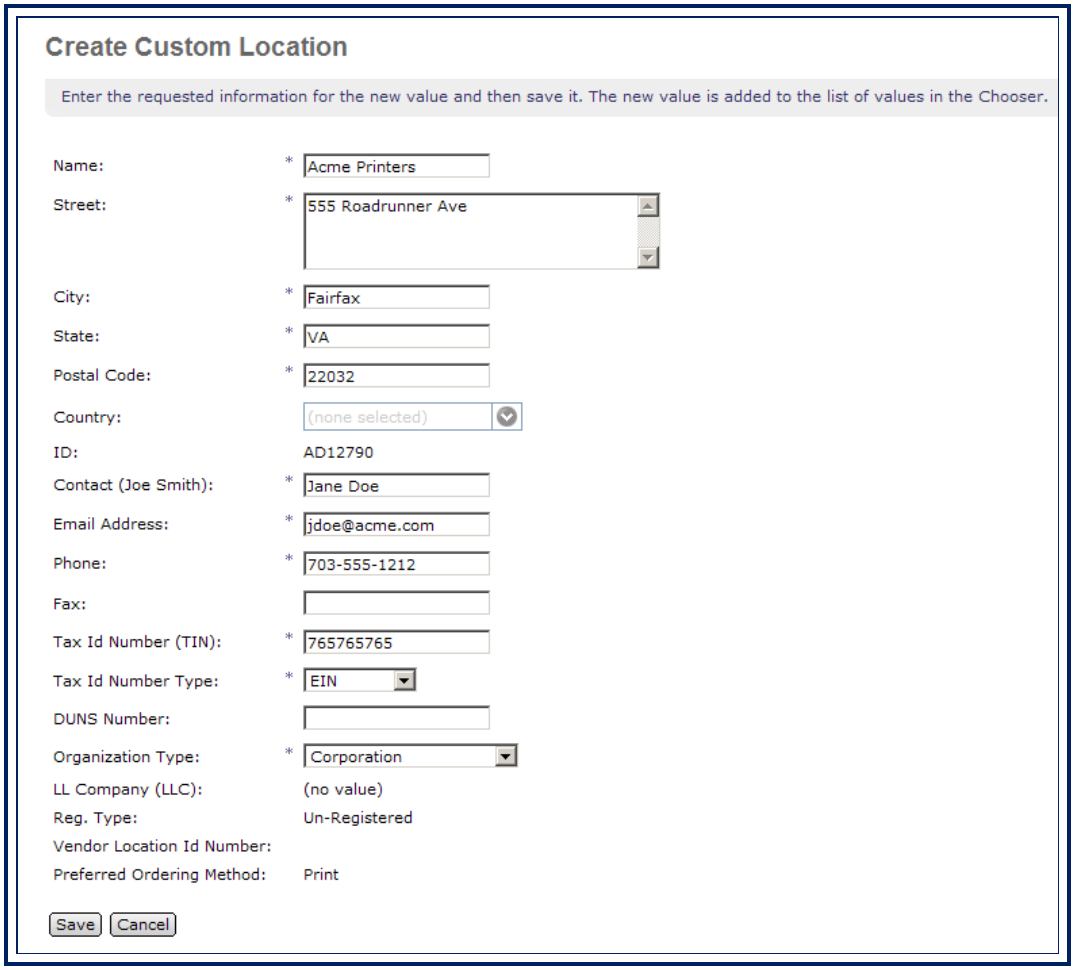
If your supplier is unregistered, access the **CREATE CUSTOM LOCATION** screen from the **ADD NON-CATALOG ITEM** screen (**Figure 48**).

Figure 48: Accessing the Create Custom Location Screen



Click the **[select]** link next to the **Location** field to open the **CHOOSE VALUE FOR LOCATION** screen, and then click **New** to launch the **CREATE CUSTOM LOCATION** screen (**Figure 49**). Complete all required fields (indicated by an asterisk) and click **Save.**

Figure 49: Create Custom Location Screen



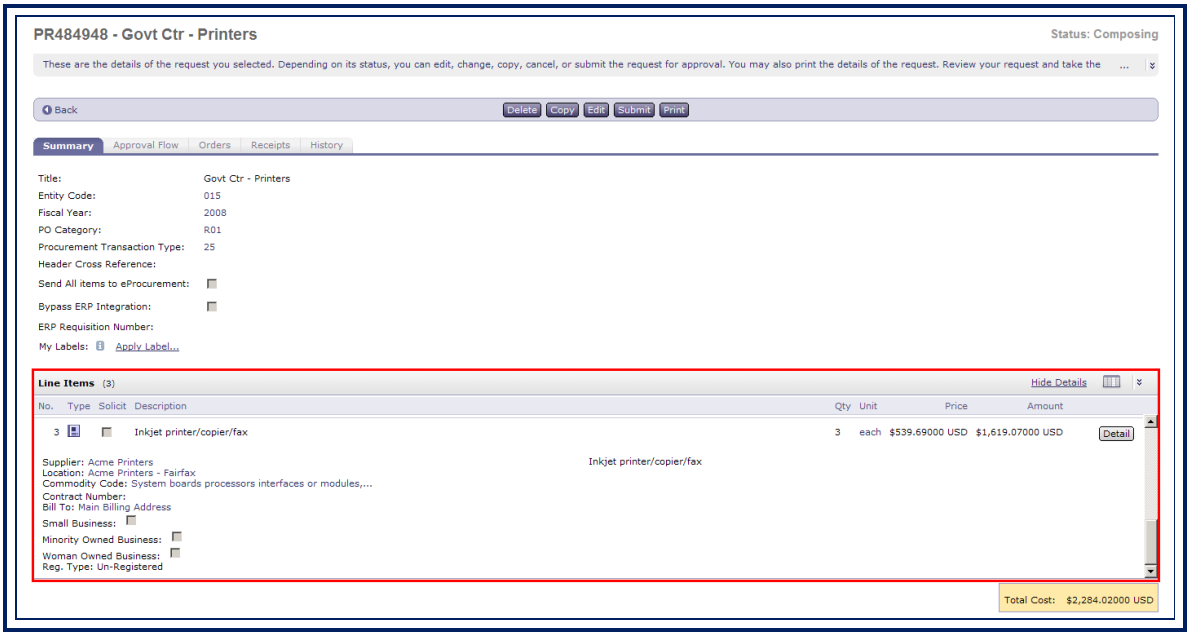
When you save the custom location information, you will be returned to the ***CHOOSE VALUE FOR LOCATION*** dialog box, where you will be able to select the new order location (**Figure 50**).

Figure 50: Newly Created Order Location

Select the new location to return to the **ADD NON-CATALOG ITEM** screen. The newly added supplier location will appear in the **Location** field. Enter any remaining information and click **OK**.

The item will appear as a line item on your requisition, with the supplier you selected and the new order location (**Figure 51**).

Figure 51: Requisition Displays Non-Catalog Item with New Location



About Unregistered Suppliers

Although eVA allows you to enter a new supplier for a specific order, that supplier's status will be listed as *Unregistered*. If you add a custom ordering location for a *registered* supplier, ***that supplier will be treated as unregistered*** for any order that uses the custom location.

As previously stated, your agency/entity could be liable for a transaction fee if you use an unregistered supplier for your eVA purchase orders.

In addition, when you order from an unregistered supplier, the **Preferred Ordering Method** will be set to *Print*, indicating that the supplier cannot receive electronic orders from the eMall. When you submit a requisition that uses an unregistered supplier, you must print your order and fax or mail it to the supplier for fulfillment.

> ***IMPORTANT!*** *Any new supplier you add is for the* ***current*** *requisition only. The eMall* ***WILL NOT*** *retain this data. If you want to purchase from this supplier again, please refer the supplier to the* ***eVA HOME*** *page to register.*

If you need more than one item from an unregistered supplier, you will want to copy the first item after you place it in your shopping cart. Select the new line item and make the necessary edits to the item description, price, and other details. Otherwise,

- You will have to re-enter all of the supplier information, *and*
- The requisition will split the transaction into separate orders.

ADDING A FAVORITE ITEM TO YOUR REQUISITION

The eMall lets you designate hosted catalog items as Favorites and group them in folders.. Adding a Favorite item to your requisition is quick and easy. To learn about managing and using Favorite items, see Adding a Favorite Item to a Requisition.

ADDING ITEMS FROM A SAVED SEARCH

Another way to add items to a requisition is from a saved search. To learn how to search for items in the eMall, see Section 8, Searching the eMall; or, to focus specifically on how to save a search to use again later, see Saving a Search.

YOUR SHOPPING CART

The **Shopping Cart** icon and contents summary (**Figure 52**) are visible on the **CATALOG HOME** screen and on any catalog search results screen. When you open a new requisition, your shopping cart will be empty (zero dollars and zero items). As you add items to your cart, the contents summary will reflect the current number of line items and the total dollar amount of the items in your shopping cart.

Figure 52: Shopping Cart Icon and Contents Summary

Each time you select an item for purchase, eVA will create a line item in your shopping cart and then return the **CATALOG HOME** screen so that you can continue to shop.

Example: Item versus Line Item

What's the Difference Between an Item and a Line Item?

As used in this manual, an item is one purchase unit (some items might be sold only by the dozen, for example) of any article you can buy in the eMall, while a line item represents the total number of purchase units of a particular article in your shopping cart or on a requisition.

For example, if you add one table and one chair to your shopping cart, they will be entered as two separate line items. If you decide that you need to increase the quantity of chairs from one to six, you will have seven items in your cart, but still only two line items.

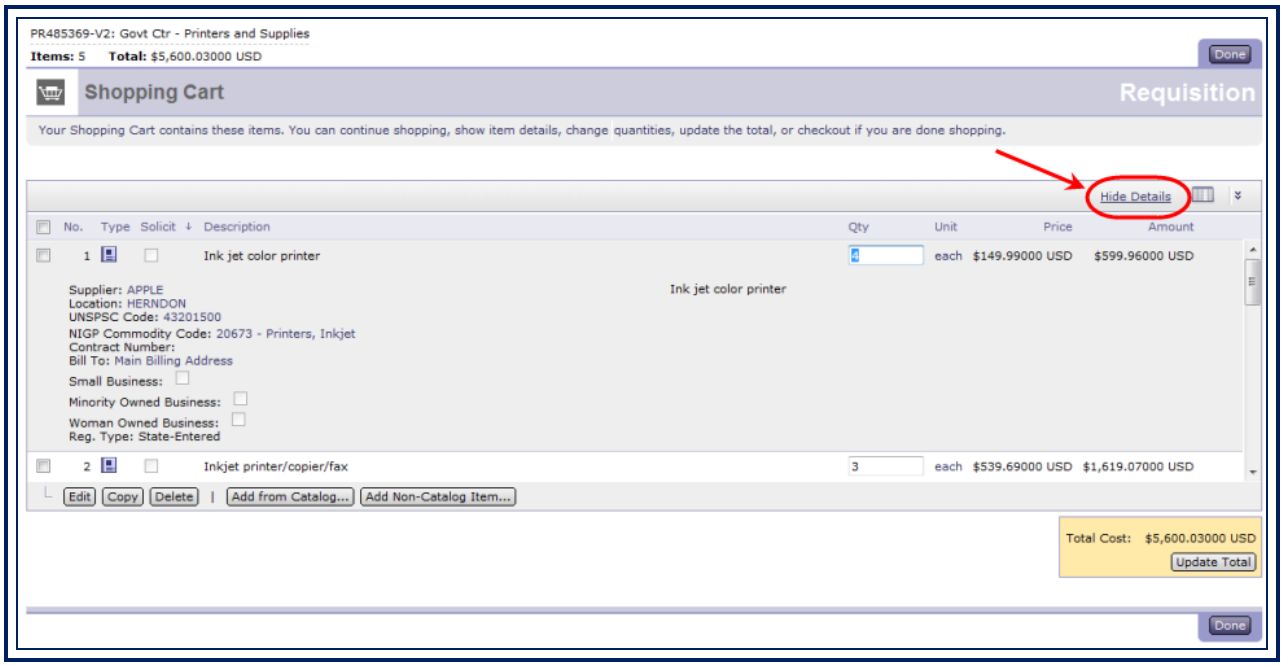
Click the **Shopping Cart** icon to open the **SHOPPING CART** screen. In this screen you can:

- Edit, copy, or delete items you have placed in the cart.
- Click **Add from Catalog** or **Add Non-Catalog Item** to continue shopping.
- Click **Update Total** after adjusting quantities or deleting items.
- Click **Done** to leave the Shopping Cart and return to the previous screen.

REMEMBER: *PunchOut items must be edited from the vendors' PunchOut site. Click the PunchOut item description to quickly return to the PunchOut catalog.*

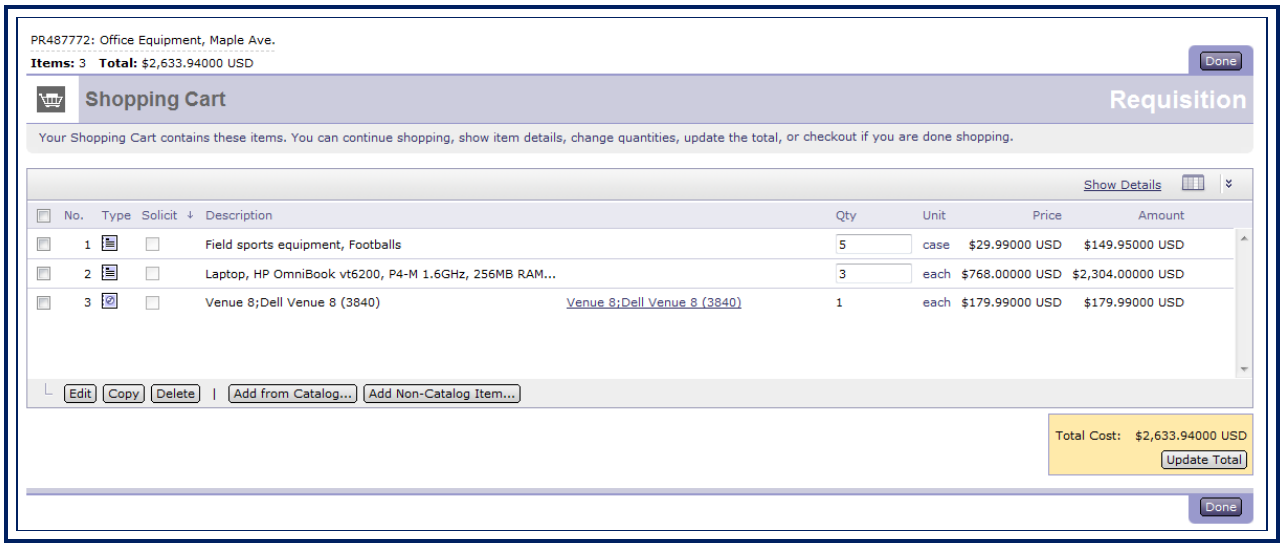
The default view of the Shopping Cart provides full details for each line item (**Figure 53**).

Figure 53: Details View of Shopping Cart Line Item



Or, if you prefer, you can click **Hide Details** to change the Shopping Cart view to a simple list format as shown in **Figure 54**. You will be able to perform all of the same functions that are available in the detail view.

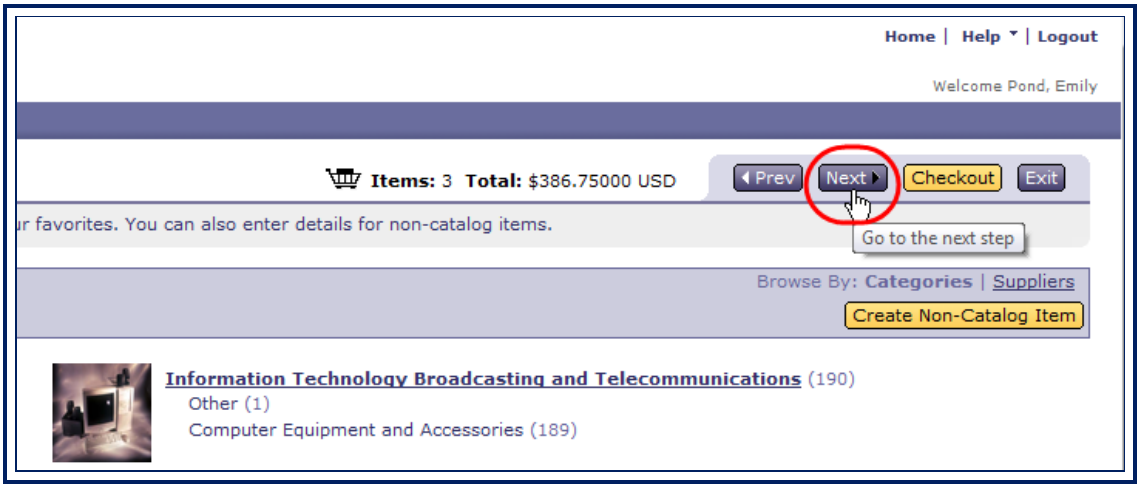
Figure 54: Simple List View of Shopping Cart



ADDING ACCOUNTING DETAILS

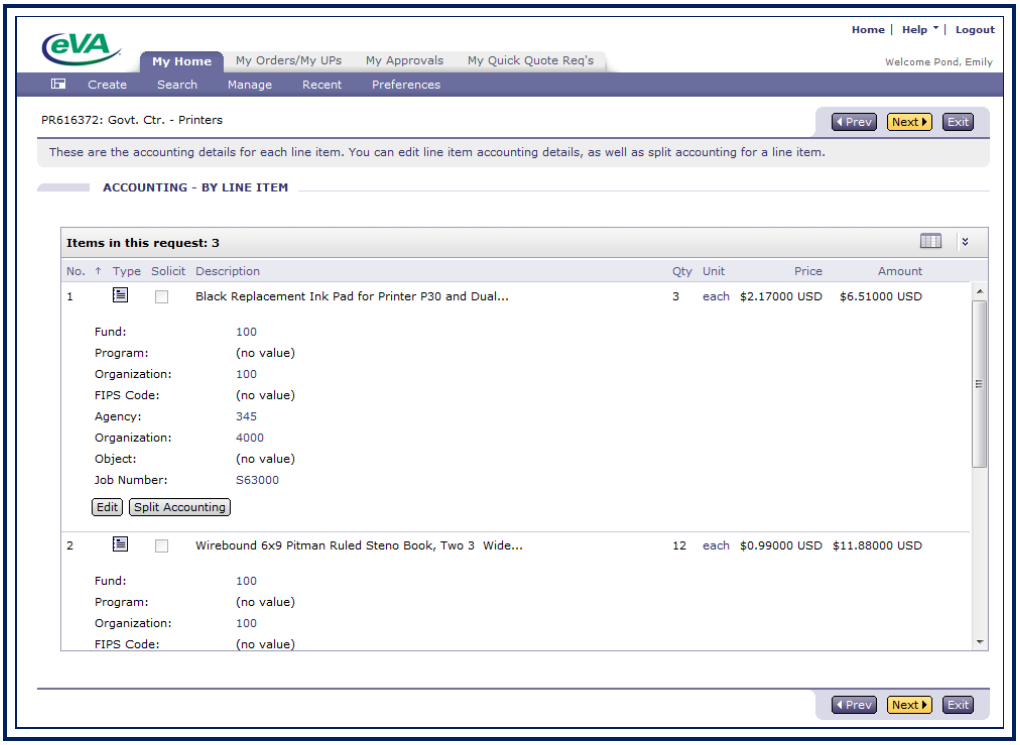
After you have selected all the items and services you need, you can enter pertinent accounting information. On the **CATALOG HOME** screen, click **Next** (**Figure 55**).

Figure 55: Proceed to Accounting Details



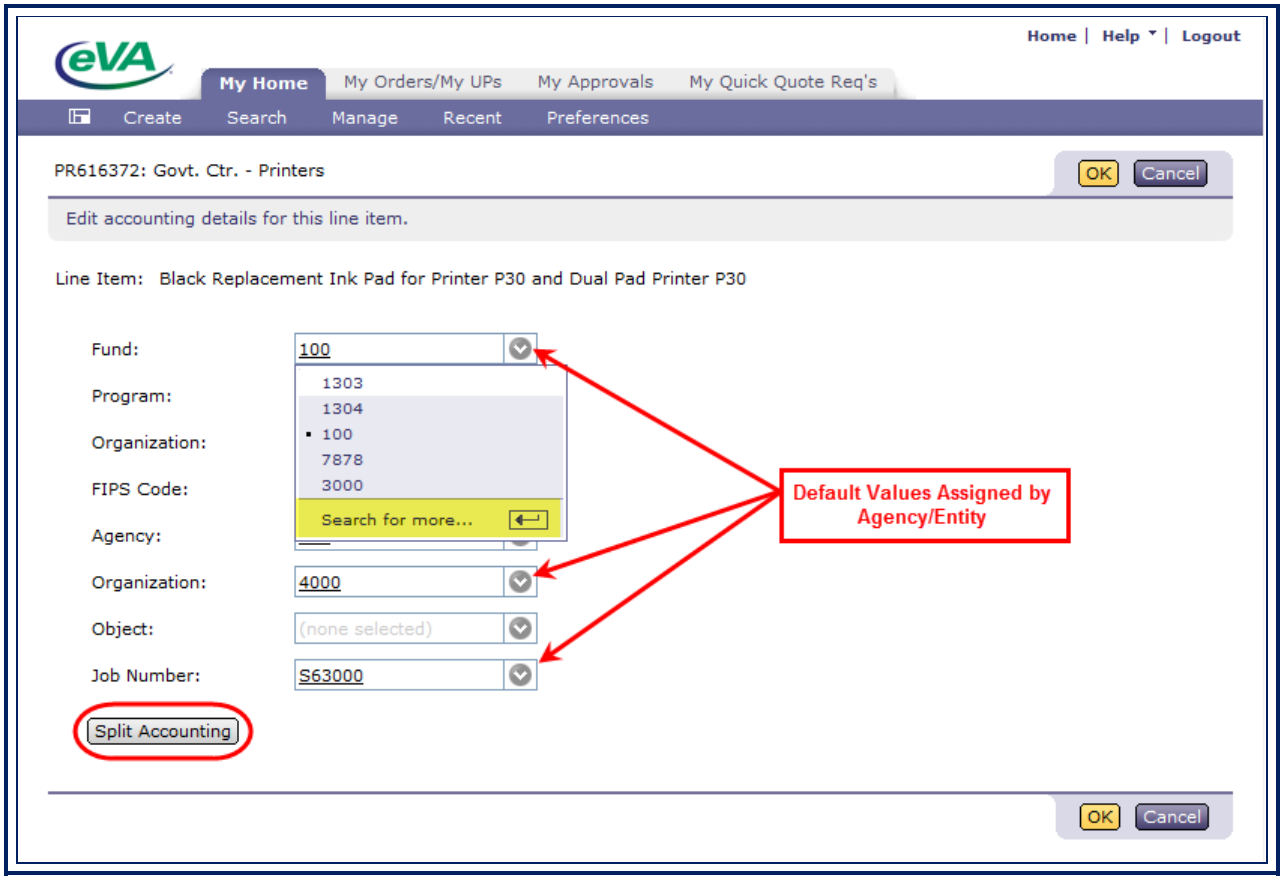
Accounting details are displayed for each line item. Click the associated **Edit** button to make changes to a particular line item.

Figure 56: Accounting Details for Line Items



If your agency/entity has set up default values for your BSO, those values will be displayed (**Figure 57**). Edit the information as needed and click **OK** to return to the ***ACCOUNTING – BY LINE ITEM*** section.

Figure 57: Accounting Details at the Line Item Level



There are two ways to edit a value:

- If you know the valid value you want, type it directly into the field, or
- If you prefer to select from a list of valid values, click the down arrow in the field you want to edit. Recently used values will appear in the drop-down list; if the value you want is not in the list, select *Search for more …*

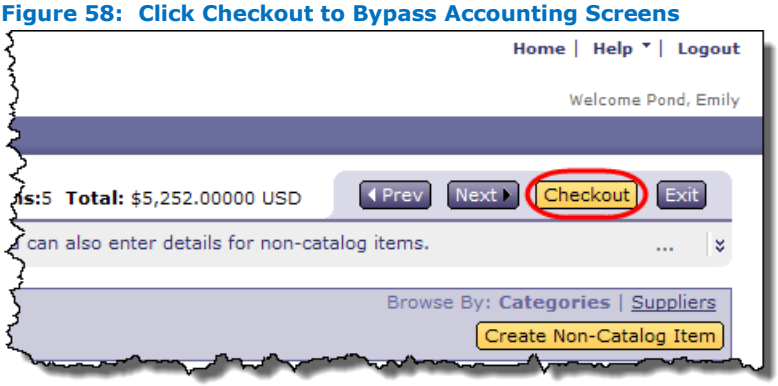
If multiple departments will share the cost of a particular line item, you can choose to split the accounting for any item. See Split Accounting for more information.

When you have made any necessary changes to the accounting information and returned to ***ACCOUNTING – BY LINE ITEMS***, click **Next** to see a summary of the requisition.

CHECKOUT

If you have added all the items you need to your shopping cart, and you do not want to make any changes to the accounting information, click **Checkout** on the **CATALOG HOME** screen (**Figure 58**) or other search screen to go directly to the **Summary** tab. (You will still be able to access and change accounting information should you change your mind.)

Figure 58: Click Checkout to Bypass Accounting Screens



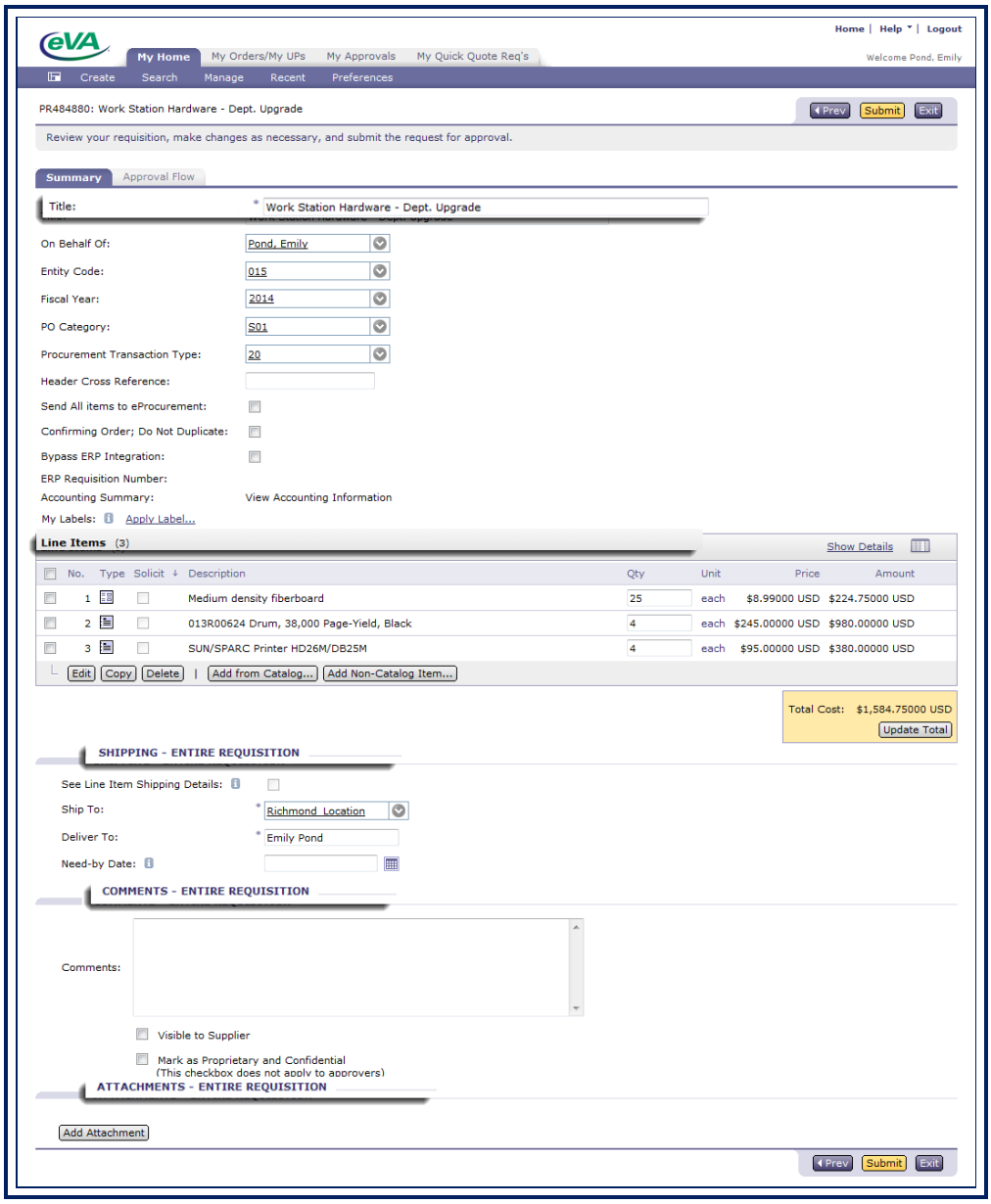
Note: If you are returning to a saved requisition, click the **Requisition Number** in the **My Home** tab to go to the **Summary** tab and begin checkout.

SUMMARY TAB

The **Summary** tab allows you to review the entire requisition on a single screen, make changes, and add comments and attachments before you submit the requisition for approval. As shown in **Figure 59**, the **Summary** tab has five sections:

- Title and Basic Information
- Line Items
- Shipping – Entire Requisition
- Comments – Entire Requisition
- Attachments – Entire Requisition

Figure 59: Requisition Summary Tab



TITLE AND BASIC INFORMATION SECTION

The information in this section is taken from the **ADD TITLE** screen. It contains general information pertaining to the entire requisition. Review this section to ensure all the information is correct.

LINE ITEMS

This section displays a list of the items you have selected for purchase. The default view provides detailed information for each line item.

Figure 60: Details View of Line Item Section

To see only basic information for all line items, select the **Hide Details** link above the **Amount** column.

Figure 61: Collapse Line Items to Hide Details

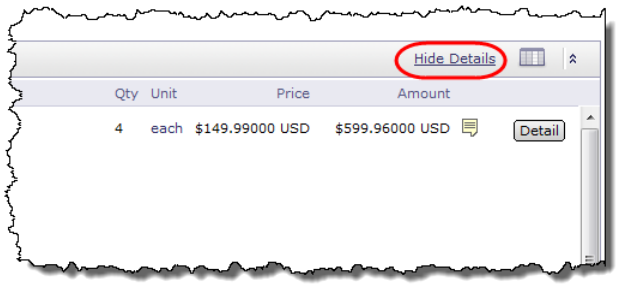
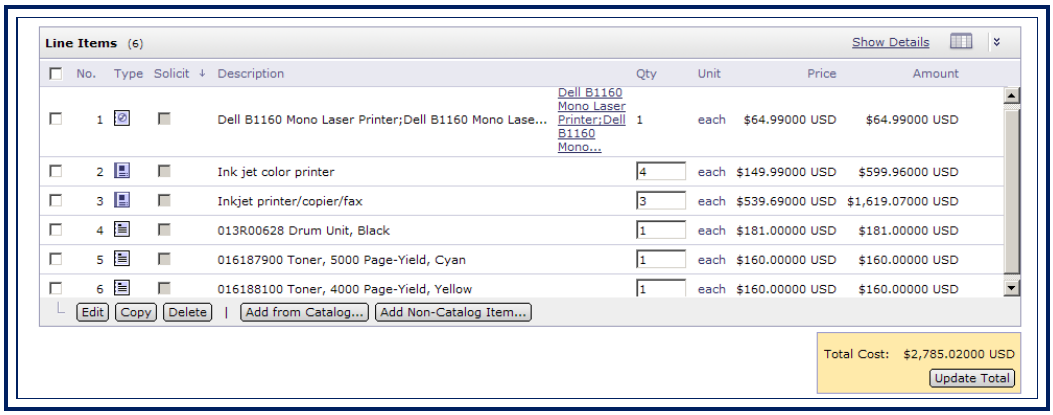


Figure 62: Collapsed View of Line Items



Although there is limited functionality in this screen, you can make certain changes. Refer to **Table 8** to see the changes that can be applied from the Requisition **Summary** tab.

Table 8: Updating Line Items from the Summary Tab

Action	Hosted Catalog Item	PunchOut Catalog Item	Non-catalog Item
Change Quantities	X		X
Copy Line Item	X		X
Copy Multiple Line Items	X		X
Delete Line Item	X	X*	X
Delete Multiple Line Items	X	X*	X

* Remember, you must delete all of the line items associated with the PunchOut catalog. To delete only some PunchOut catalog line items, you must return to the catalog.

To access complete line item details, select the checkbox next to the item and then click **Edit**. The **LINE ITEM DETAILS** screen will open. In this screen, you can access and adjust various attributes for the selected item. For example, you can change shipping and billing addresses; you can also adjust accounting data including dividing your order between two or more account numbers (split accounting). For more information, see *Modifying Requisitions*, Line Item Changes.

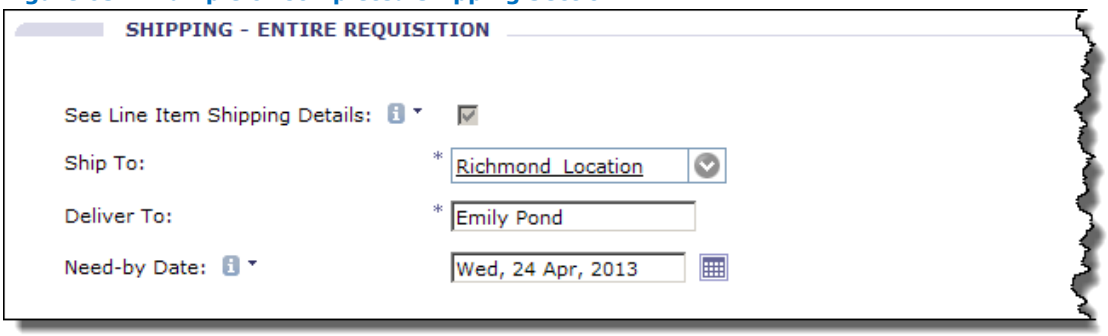
SHIPPING – ENTIRE REQUISITION

The ***SHIPPING – ENTIRE REQUISITION*** section of the **Summary** tab (**Figure 63**) allows you to accept the pre-populated default information or enter new shipping information for the entire requisition.

Table 9: Completing the Shipping Information section

Field	Pre-Populated?	When and How to Use
See Line Item Shipping Details	Yes	This checkbox is for eVA use only. It is automatically selected if you have entered one or more different **Ship To** locations at the line item level.
Ship To:	Yes	This field is pre-populated with the default **Ship To** location. You can change that location using the drop-down menu.
Deliver To:	Yes	This field typically defaults to the name of the individual preparing the requisition, but any name can be entered manually.
Need-by Date	No	The date by which the requested goods or services must be received by the requestor. Click the calendar icon to select any future date.

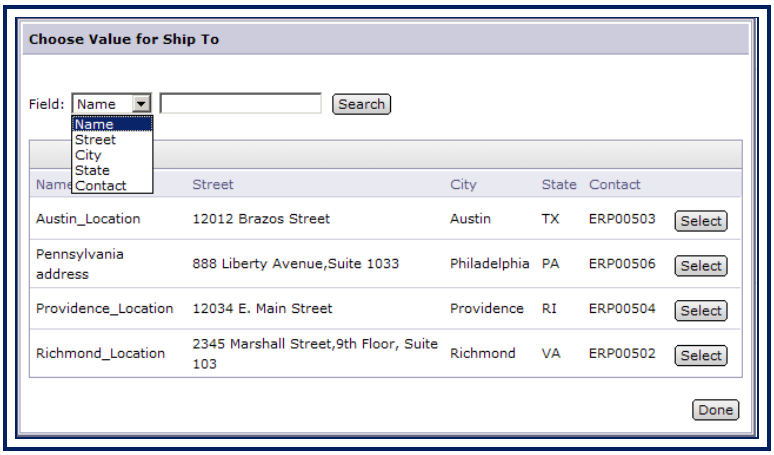
Figure 63: Example of Completed Shipping Section



To change the default **Ship To:** location for the current requisition, click the down arrow to open the drop-down menu. If the desired location is not on the list, select *Search for more...* to see all available locations for your organization.

You can also search for the shipping address by location name, street, city, state, or contact (**Figure 64**), which is convenient if your agency/entity has many shipping locations.

Figure 64: Searching for Shipping Locations



To have an item shipped to a different location from other items, select it in the ***LINE ITEMS*** section and click **Edit** to make the appropriate changes in the **EDIT LINE ITEM** screen. To ship multiple items to a second location, see Mass Editing.

> ***IMPORTANT!*** *If you need to permanently change the default location for all future requisitions, please contact your organization's eVA Lead.*

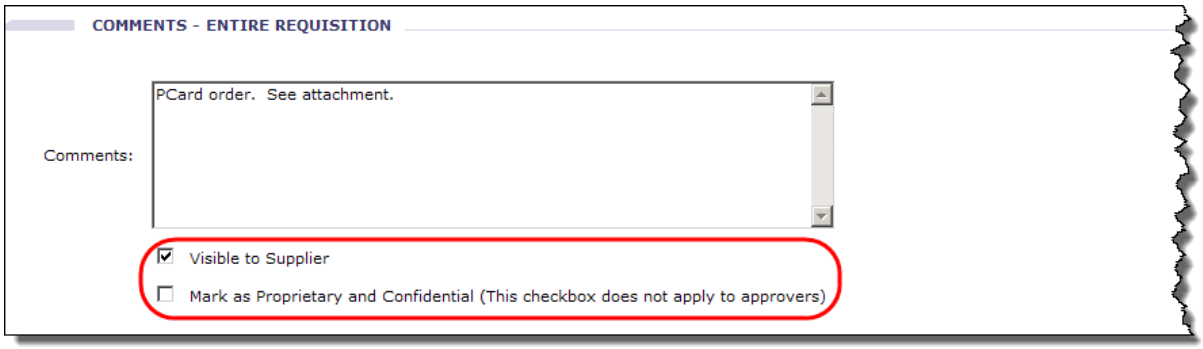
COMMENTS – ENTIRE REQUISITION

You can enter comments to justify your request or to provide additional details. Comments become a permanent part of the requisition. You can control who sees your comments by selecting one or both of the following check boxes (**Figure 65**):

- **Mark as Proprietary and Confidential:** By default, your comments can be viewed by anyone internal to your agency/entity who has access to the requisition. Select this check box to limit internal access. As noted on the screen, the *Confidential* designation does not apply to approvers. Approvers can always view your comments; they can also add their own comments to the request.
- **Visible to Suppliers:** By default, comments appear on the requisition but not on the purchase order that is sent to the supplier. Select this check box if you want the supplier to see your comments on the purchase order.

If you are creating a Change Order or a Purchase Card Order, it is advisable to enter a comment to alert the supplier.

Figure 65: Using Checkboxes to Control Access to Comments



To add comments at the line item level, select the appropriate item in the ***LINE ITEMS*** section and click **Edit** to open the **EDIT LINE ITEM** screen. Scroll down to the bottom of that screen to add your comments.

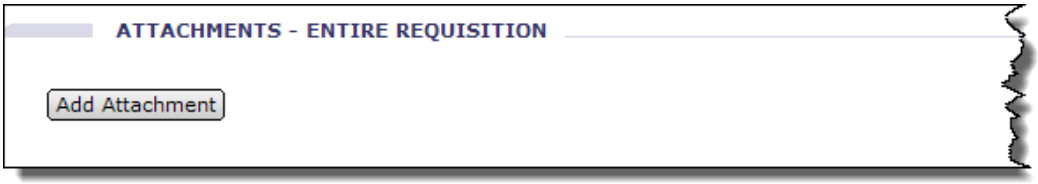
> ***WARNING! NEVER enter your Purchase Card number in a Comments field!*** *To be secure, your Purchase Card number should only appear in the PCard pick list in the General Information section of the requisition (**Figure 28**).*

If you need multiple header comments for the ENTIRE requisition (not at the line item level), you can go back and enter additional comments after the requisition has been exited either by submission or by saving. The requisition can be in any status, and comments can be added at any time.

ATTACHMENTS – ENTIRE REQUISITION

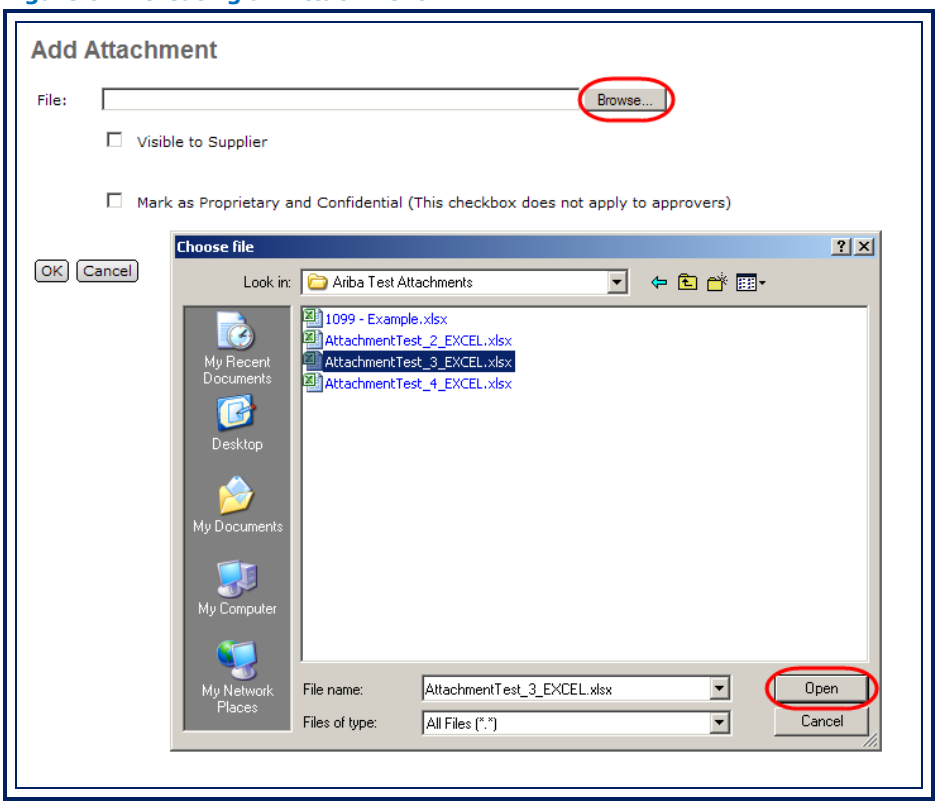
Click **Add Attachment** (**Figure 66**) to open the screen from which you can choose a file on your local or network drive to include with the requisition.

Figure 66: Adding an Attachment to the Requisition



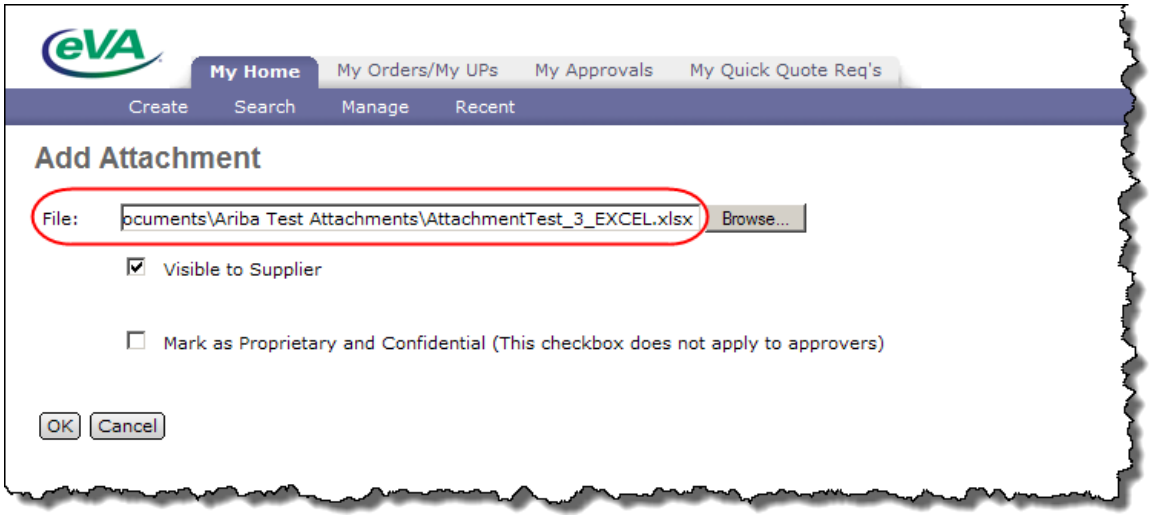
On the **ADD ATTACHMENT** screen, click **Browse...** to open the **Choose file** dialog box (**Figure 67**).

Figure 67: Creating an Attachment



Select the file you want to attach and click **Open** (or double-click the file name). The file name will appear in the **File** field of the **ADD ATTACHMENT** screen (**Figure 68**).

Figure 68: Attaching the File to the Requisition



The **ADD ATTACHMENT** screen provides the same options you saw in the Comments section, this time regarding access to view the attachment (**Figure 68**). Select your options (if any), and click **OK** to attach the file and return to the **Summary** tab. You will be able to adjust these selections from the **Summary** tab if you want to make changes before submitting your requisition.

SUBMITTING YOUR REQUISITION

If you have finished shopping, you are ready to review and submit your requisition.

REVIEW YOUR REQUISITION

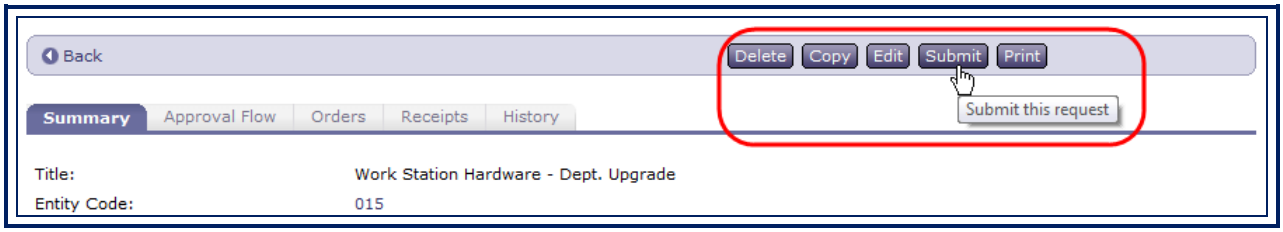
It is always a good idea to review any requisition before you submit it. For a simple requisition with no line-item level customizations, this can be accomplished from the **Summary** tab.

When reviewing a requisition, make sure that you are in the **Details** view of the ***LINE ITEMS*** section (**Figure 53**) where you can see the supplier's name and location along with the item details. If you need to implement line item changes, see Editing Line Items.

SUBMIT FOR APPROVAL

When you finish your review, submit your requisition.

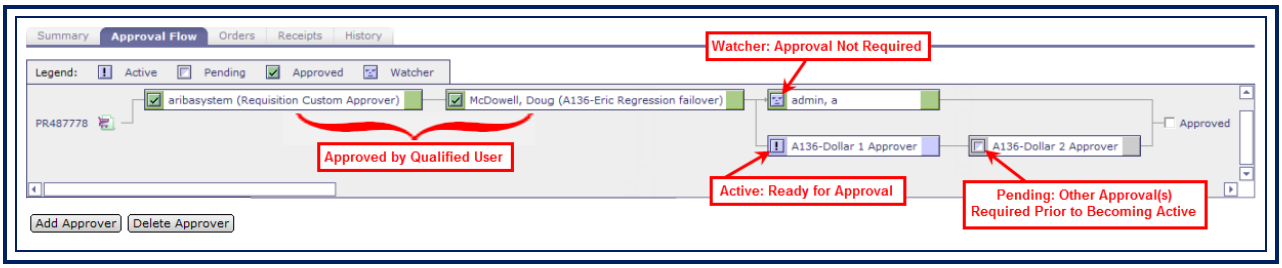
Figure 69: Submitting the Requisition



Monitoring the Approval Process

The **Approval Flow** tab shows the approvals that are required in order for the requisition to move to *Ordering* status, as well as any watchers. You will be able to see the status of each approval, as shown in **Figure 70**. If your name appears as the last approver in the workflow, you will need to print the order and mail or fax it to the supplier. When all other approvals are complete, you will receive an email notification and the requisition will appear in your **To Do** list for your approval.

Figure 70: Understanding Status of Approval Flow

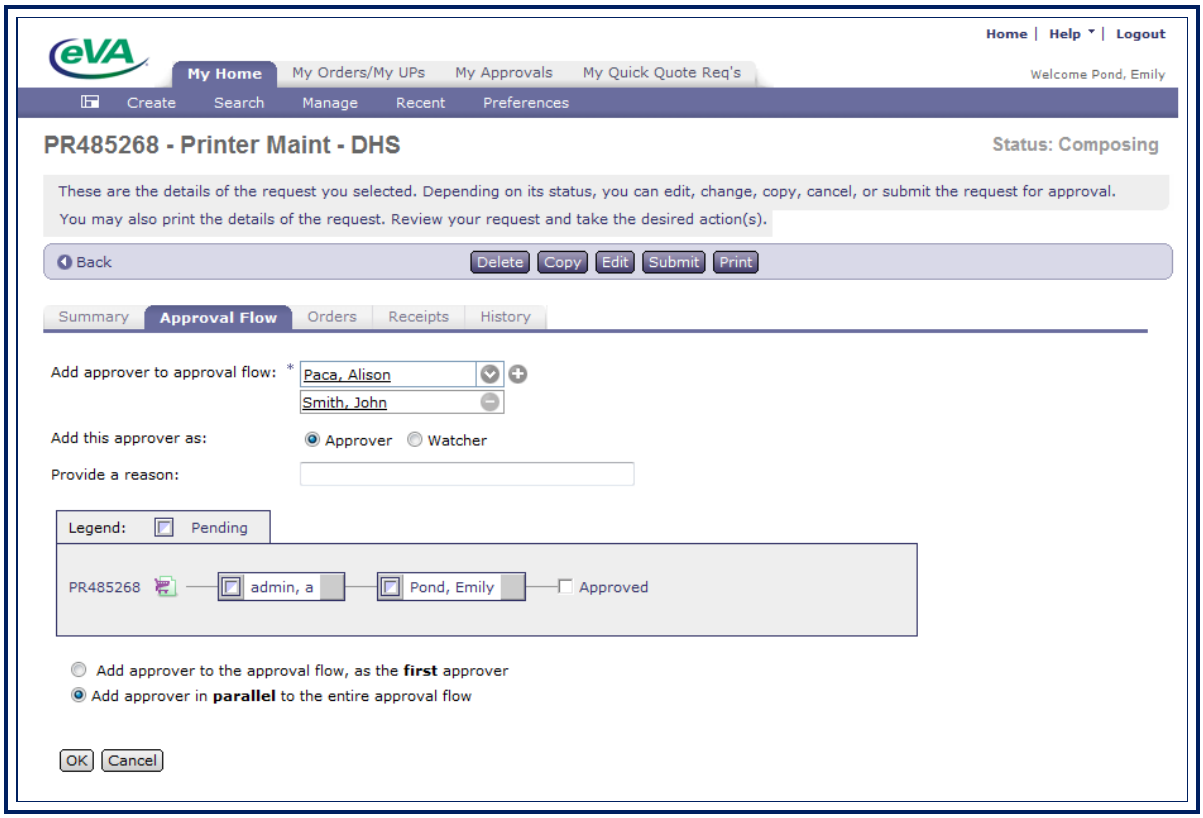


Adding and Deleting Approvers

In addition to displaying the approval flow, the **Approval Flow** tab houses the **Add Approver** and **Delete Approver** buttons (**Figure 70**).

Buyer-added approvers are referred to as *ad hoc* approvers. Think of them as "single-use" approvers; ad hoc approvers can take action only on the specific requisition for which they were created. If you want to add an approver, do so *before* you submit the requisition. Begin by clicking **Add Approver**.

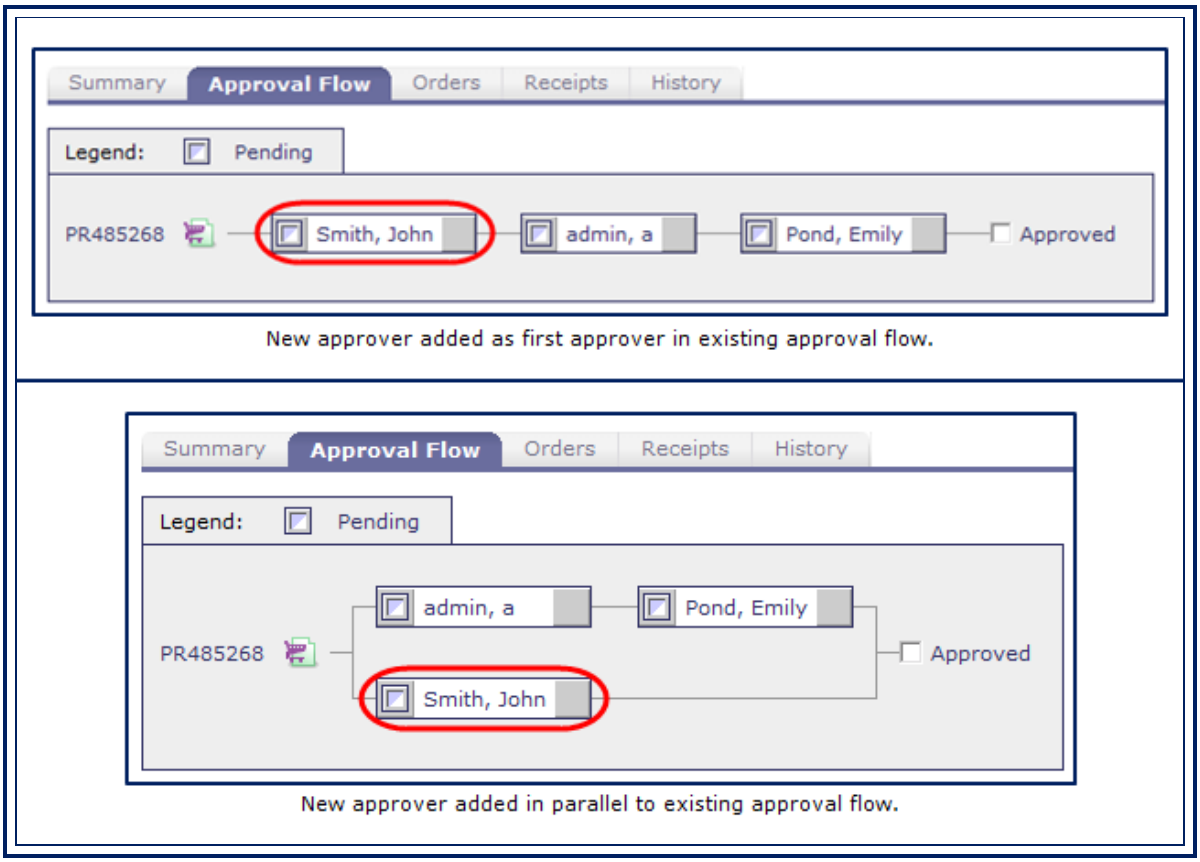
Figure 71: Adding an Ad Hoc Approver to an Approval Flow



On the **ADD APPROVER** screen (**Figure 71**), complete the following steps:

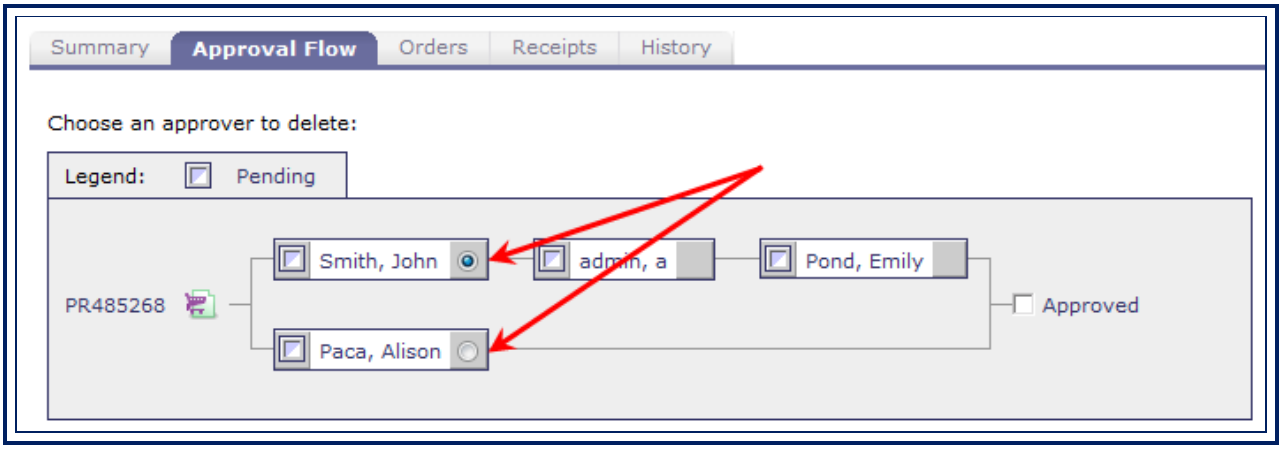
1. Use the drop-down list to select the name of the individual you want to add (or choose *Search for more…* to find a name that does not appear in the drop-down list). You can add multiple approvers; just return to the drop-down list and select another name.
2. Indicate whether that person will be an approver or a watcher. Be aware that the role you select will be applied to all users listed in the **Add approver to the approval flow** fields. If you want to add both approvers and watchers, follow these steps to add the first group of users (for example, approvers), then return to step 1 and add the second group.
3. After you select at least one name and indicate the role to be assigned, you have the option to add a reason for the addition.
4. Last, indicate whether you want the new approver to be added as the first approver, or in parallel to the existing approval flow (**Figure 72**). Adding the new approver to the beginning of the flow stops the process until that person approves the requisition; if you add the new approver in parallel, the review process can go forward without delay.

Figure 72: Approval Flow Positions for Ad Hoc Approvers



You can delete only the approvers and watchers that you added. You cannot delete required approvers. Begin by clicking the **Delete Approver** button located under the approval flow (**Figure 70**). Approvers and watchers that you added will display with radio buttons, allowing you to select one at a time for deletion (**Figure 73**).

Figure 73: Identifying Approvers for Deletion

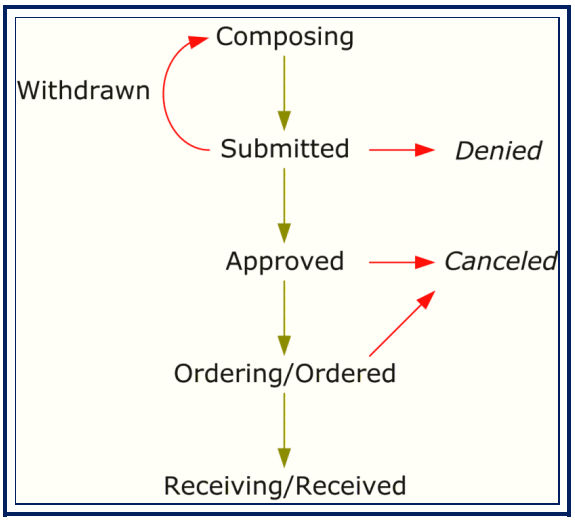


UNDERSTANDING REQUISITION STATUS

The Order process begins with the requisition and ends when the supplier is paid for the items received.

Each step in the process changes the status of the request (**Figure 74**). There is a standard path that most requisitions will follow. There are also alternative paths a requisition might take that differ from the usual flow.

Figure 74: Requisition Status Flow



eVA can be configured to automatically keep the relevant parties informed by sending notification messages as a request flows through the approval process. You can also check on the status of your requisition via the **My Documents** list on the **DASHBOARD**.

Figure 75: Requisition Status Displayed in My Documents List

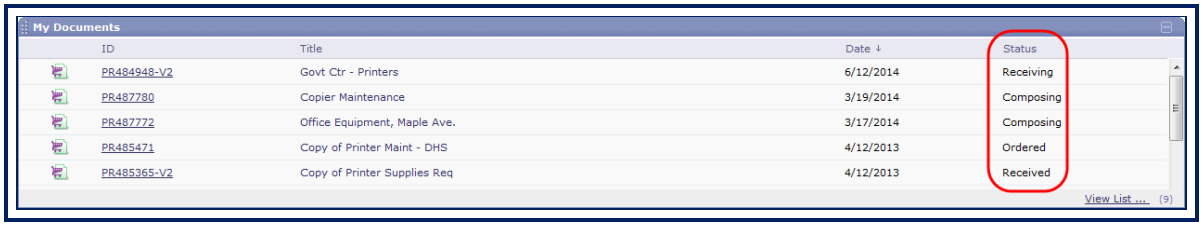


Table 10 explains the meaning of the various eVA requisition statuses.

Table 10: Explanation of Requisition Status

Status	Description
Composing	The preparer is still working on the requisition, which has been saved but not submitted. • Only the preparer of a requisition can submit it.
Collaboration	This status is specific to Ariba Category Procurement (ACP) transactions. It indicates that the requisition is in the collaboration period between *Composing* and *Submitted*.

Status	Description
Submitted	The requisition has been submitted and is in the approval process (neither fully approved nor denied). A requisition in *Submitted* status cannot be changed, but the preparer can withdraw it. A requisition remains in *Submitted* status until one of the following occurs: • Everyone listed on the Approval Flow approves the requisition (status changes to *Approved*) • Any approver denies the requisition (status changes to *Denied*) • Preparer withdraws the requisition (status changes back to *Composing*)
Denied	A required approver has denied the requisition. The requisition remains in *Denied* status until: • The preparer withdraws the requisition (status changes back to *Composing*) • The preparer resubmits the requisition (status changes back to *Submitted*)
Approved	All required approvers have approved the requisition or eForm. • An eForm can be in *Approved* status in the normal course of processing. • For a purchase requisition, *Approved* status indicates a problem. Contact eVA Customer Care at 1-866-289-7367 for help.
Ordering	An approved requisition is generating one or more orders. Requisitions usually remain in *Ordering* status for a short time, while one or more orders are being generated and transmitted. • When all orders have been transmitted successfully, the requisition moves to *Ordered* status. • Occasionally a request will linger in *Ordering* status; for example, when there is a problem transmitting the order to the supplier. • If a requisition stays in *Ordering* status longer than a half hour, contact eVA Customer Care at 1-866-289-7367 for help.
Ordered	The items on the requisition were successfully converted to one or more orders. A requisition stays in *Ordered* status until one of the following happens: • Receiving is performed against the order, putting it in *Receiving* or *Received* status, or • The preparer cancels the requisition. The state of both the original requisition and any associated orders change to *Canceling* or *Canceled* status.
Canceling	The preparer canceled the requisition after the order was created. Requisitions usually remain in *Canceling* status for a short time while eVA transmits the cancellation and confirms that it has been transmitted successfully. • When the cancellation order has been placed, the requisition transitions to *Canceled* status. • Sometimes a request may linger in *Canceling* status; for example, when eVA is communicating with the supplier by fax and there is a transmission error. If the requisition stays in *Canceling* status longer than a half hour, contact eVA Customer Care at 1-866-289-7367 for help. • *Canceling* status applies to both the original requisition and to all associated orders. **Warning:** Canceling a requisition will cancel **all** orders created from it. If you are trying to cancel one of multiple orders from a single requisition, use the Change Order functionality instead to delete the applicable lines.
Canceled	The preparer canceled the requisition after it was approved and orders were created. Cancellation applies to both the original requisition and its associated orders. • When a requisition has been canceled, users can take no further actions. **Warning:** Both the original requisition and its associated orders remain in *Canceled* status. If you want to change and re-issue the requisition, be sure to copy the requisition **before** you cancel it.

Status	Description
Receiving	Some receiving has occurred, but not all. For example, partial receipts have been completed for some order line items, or items have been rejected. • A request might remain in *Receiving* status for an extended period of time until all receipts are completed. • A receiver can close an order for receiving before all items have been received. Customer Care recommends creating a change order to reconcile the final order with the amount received.
Received	The order is closed; a requisition has been submitted and approved, the order has been sent, and the goods have been shipped and received. • When a request reaches *Received* status, it is final and no change orders can be processed. However, the order can be reopened so that a change order can be created.

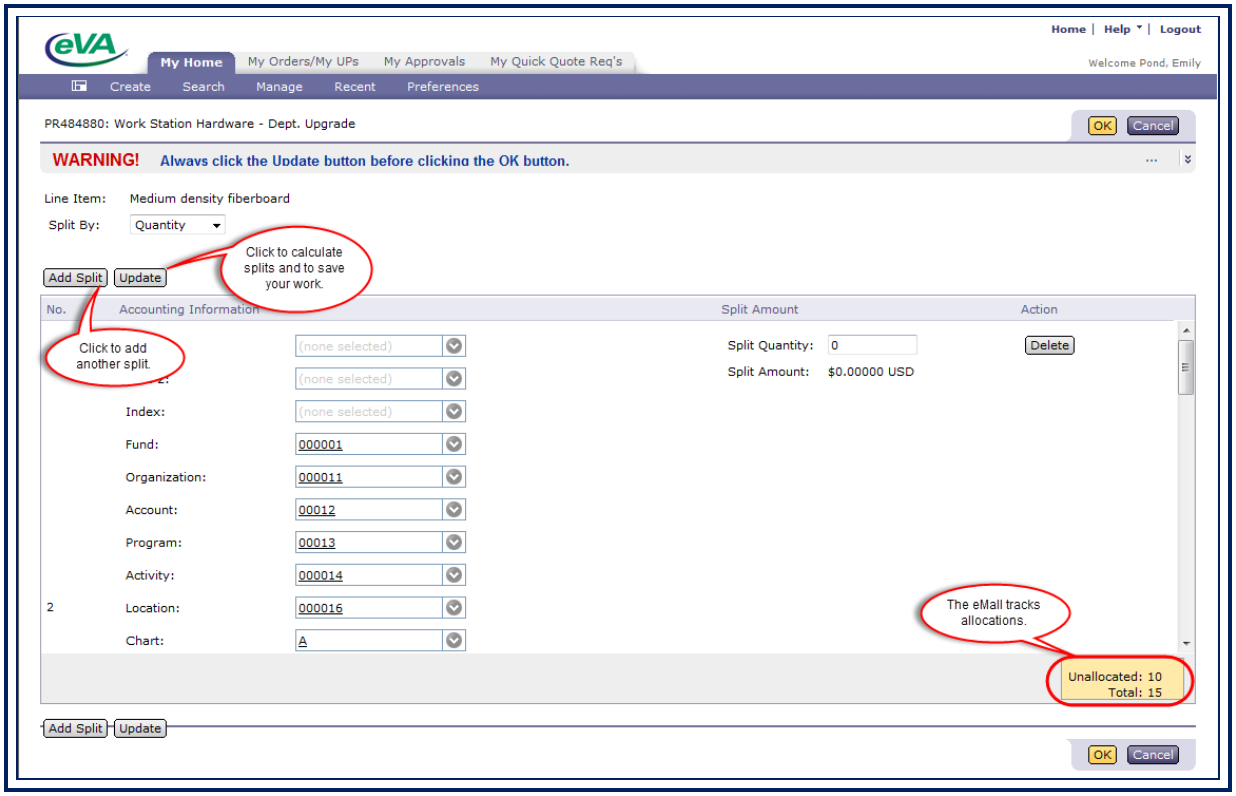
7. SPLIT ACCOUNTING

Split accounting allows you to share the cost of an item between two or more accounting groups. For example, if a new printer will be used by several departments, you can use split accounting to share the cost of the printer among those departments.

To implement split accounting for a line item, select the item from the **Summary** tab or from your shopping cart and click **Edit** to open the **EDIT LINE ITEM** screen. Click the **Split Accounting** button located at the bottom of the ***ACCOUNTING – BY LINE ITEM*** section (**Figure** 56**Error! Reference source not found.**).

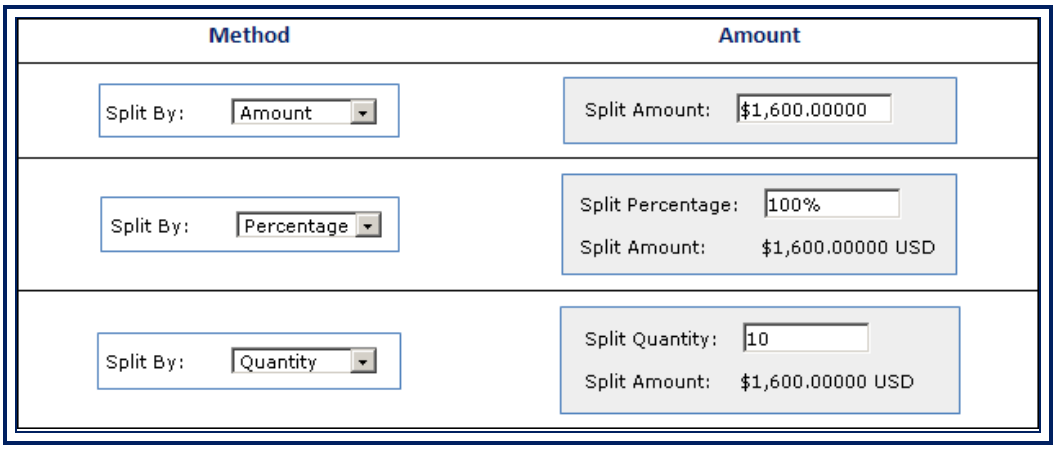
When the **SPLIT ACCOUNTING** screen opens (**Error! Reference source not found.**), it will display two accounting splits with identical information (matching the values entered in the ***ACCOUNTING – BY LINE ITEM*** section).

Figure 76: Split Accounting Screen



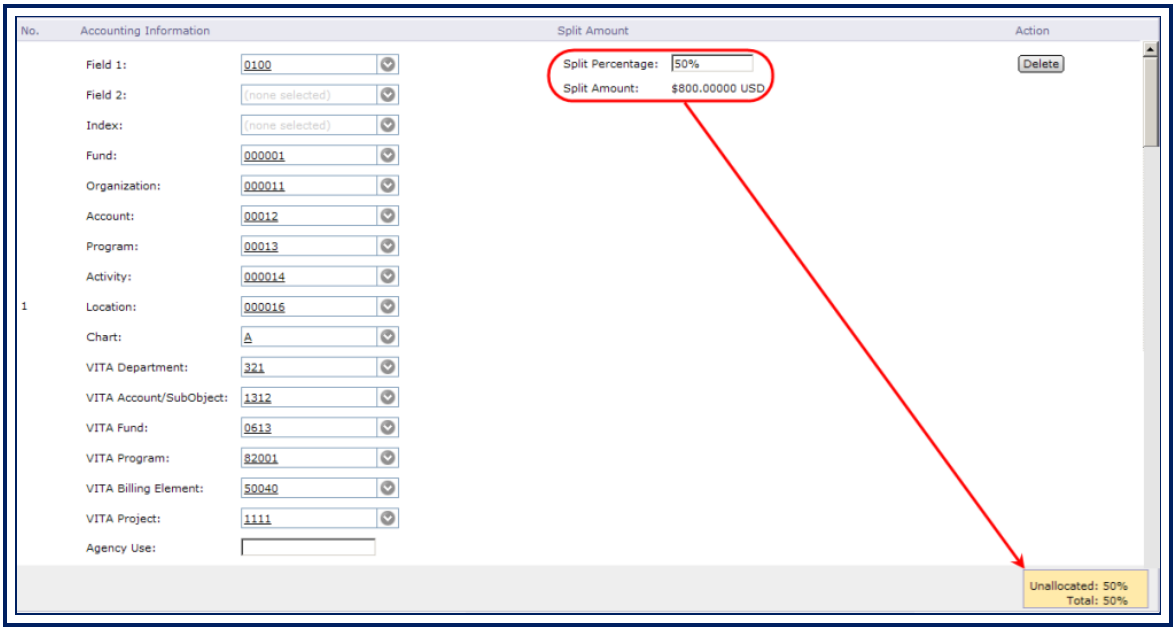
Begin by selecting the method you will use to allocate line charges, as shown in **Figure 77**. If you need more splits, click **Add Split** until you have the number you want.

Figure 77: Choose from Three Calculation Methods



eVA will keep track of your allocations to each split to ensure that the funds are fully allotted.

Figure 78: Split Accounting Allocation Totals

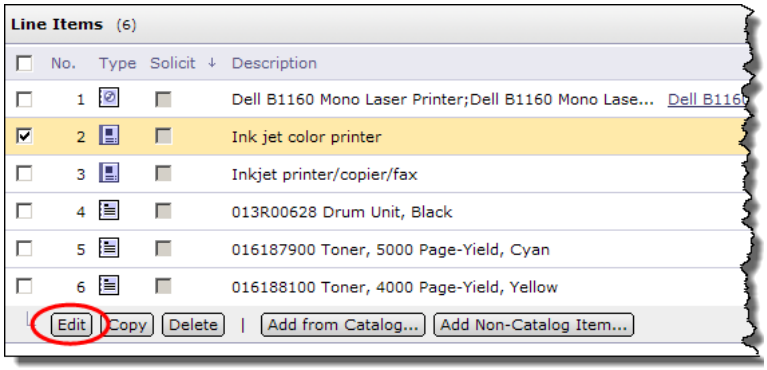


To check your allocations, click **Update**. The amount that remains unallocated and the total amount assigned will be displayed (**Figure 76**). When you have finished assigning funds among the splits, click **Update** and then click **OK** to return to the **EDIT LINE ITEMS** screen.

8. EDITING LINE ITEMS

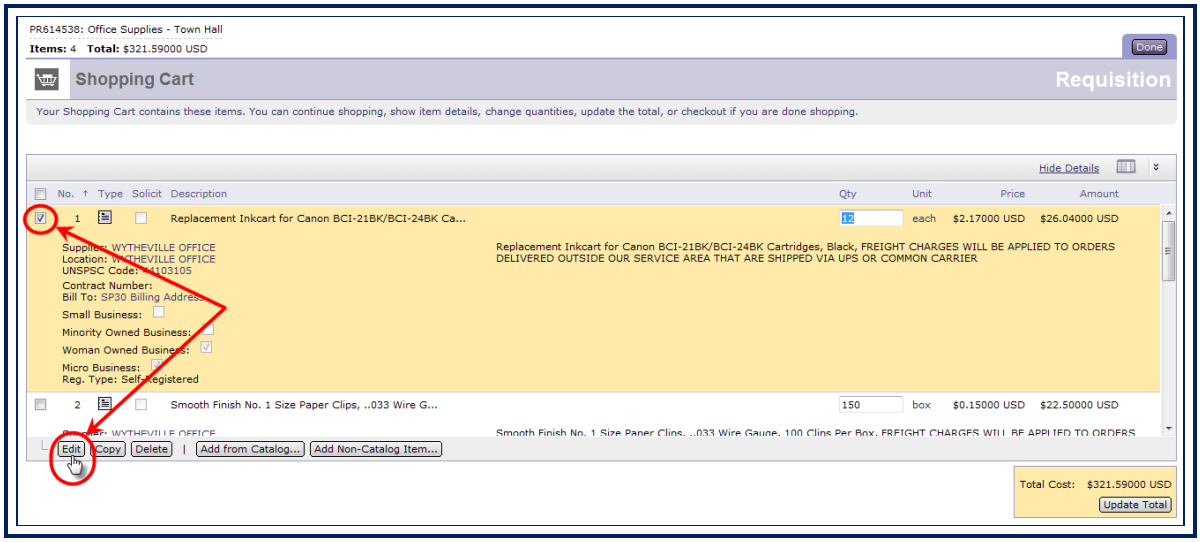
You can access complete information for any line item from the ***LINE ITEMS*** section of the **Summary** tab **Error! Reference source not found.**.

Figure 79: Accessing Line Item Details



Another path to the **EDIT LINE ITEM** screen is from your shopping cart, as shown in **Figure** 80. In either case, select the checkbox next to the appropriate line item and click **Edit**; the **EDIT LINE ITEM** screen will open.

Figure 80: Using the Edit Function to Add Accounting Information



You can elect to edit multiple line items simultaneously, provided you want to make the same change to each line item; simply select all the line items you want to change before clicking **Edit**. For more information, see Mass Editing. Note that some fields are not eligible for mass editing. See **Table 11** for information on individual fields.

The **EDIT LINE ITEM** screen comprises five sections:

- Line Item Details
- Accounting – By Line Item
- Shipping – By Line Item
- Comments – By Line Item
- Attachments – By Line Item

In order for the screen shots to be readable, we will examine this screen one section at a time; just be aware that all of the above-listed sections appear on a single, scrollable screen.

LINE ITEM DETAILS

The information in the ***LINE ITEM DETAILS*** section comes from catalog and supplier data coupled with your specifications regarding quantity, ordering location, and other options when applicable (**Figure 81**). Some information, such as the **Bill To** address, may be pre-populated if your agency/entity has set up default values for your BSO profile. In the case of non-catalog items and unregistered suppliers, the data you entered during item and supplier setup is displayed here.

Figure 81: *Line Item Details* Section of Edit Line Items Screen

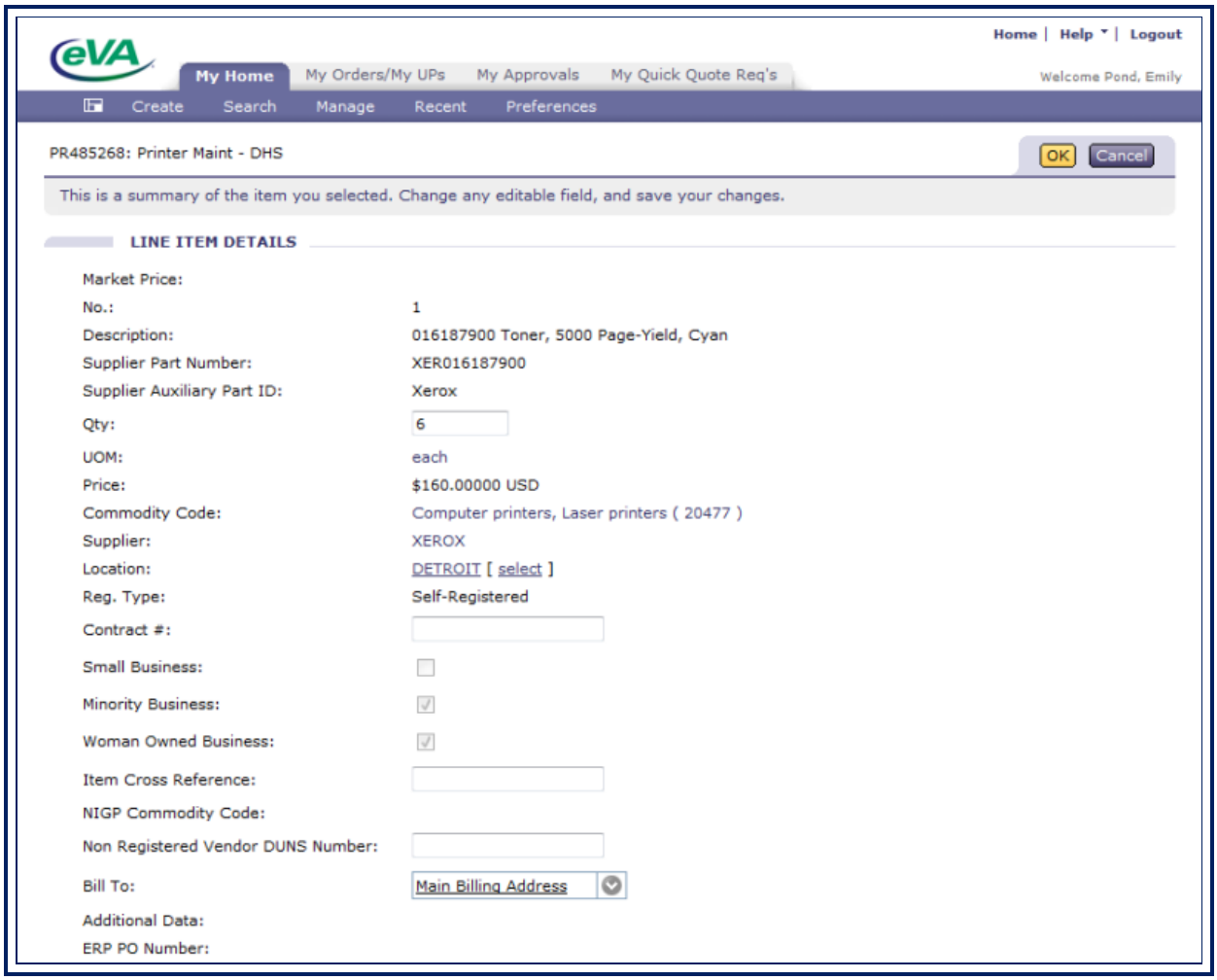


Table 11 lists the editable fields in this section and indicates whether each field can be included in a mass edit. Note that this information applies only to hosted catalog items. For PunchOut catalog items, see Editing PunchOut Catalog Items.

Table 11: Editable Line Item Detail Fields

Field	Definition	Mass Edit?
Qty:	Quantity to be purchased	No
Location:	• Supplier location from which you want the item to be shipped This field is available for mass edits ONLY for items from the same supplier.	Yes*
Contract #:	• May be auto-populated or entered manually	Yes
Item Cross Reference	• Used as a reference field for incoming import transactions. • Example: When a Quick Quote is awarded, the Quick Quote Award number populates this field.	No

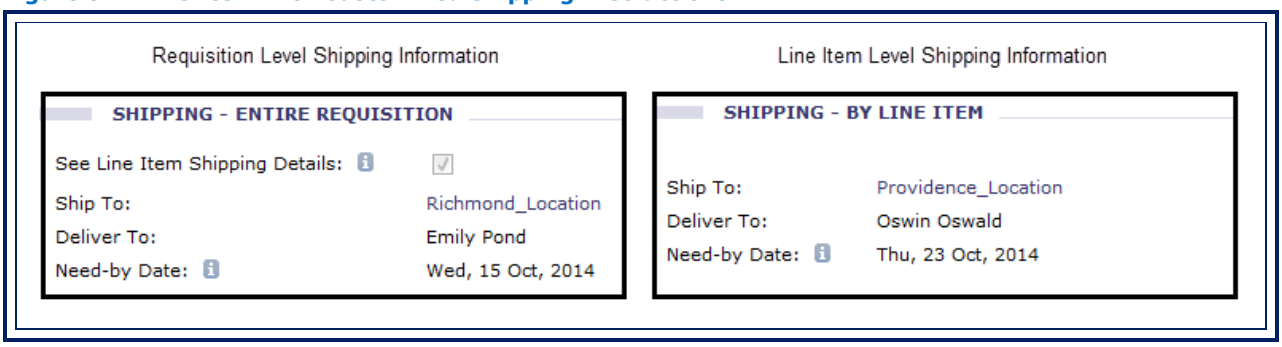
Field	Definition	Mass Edit?
Non Registered Vendor DUNS Number:	• Can be entered manually when your chosen vendor is not registered in eVA	No
Bill To:	• When more than one authorized billing address exists for your entity/agency, choices will be presented in a drop-down list • This field cannot be edited when only one billing address exists in the eMall	Yes

SHIPPING – BY LINE ITEM

The next section of the **EDIT LINE ITEMS** screen concerns shipping. **Figure 82** shows the shipping instructions for the entire requisition on the left and customized shipping instructions for a single line item on the right. Any or all of the three shipping fields can be different from those entered at the *Entire Requisition* level.

The requisition-level shipping information includes a check box, **See Line Item Shipping Details**. When the check box is selected, it alerts the vendor to the need to ship to more than one location. Any time you add shipping instructions at the line item level, this check box is automatically selected.

Figure 82: Line Item with Customized Shipping Instructions



The eMall lets you designate a different shipping destination for each line item on your requisition, should you want to do so (provided your agency/entity has a sufficient number of valid shipping locations), but you cannot split delivery of articles within a line item. You must create two line items if you want the supplier to deliver to two locations.

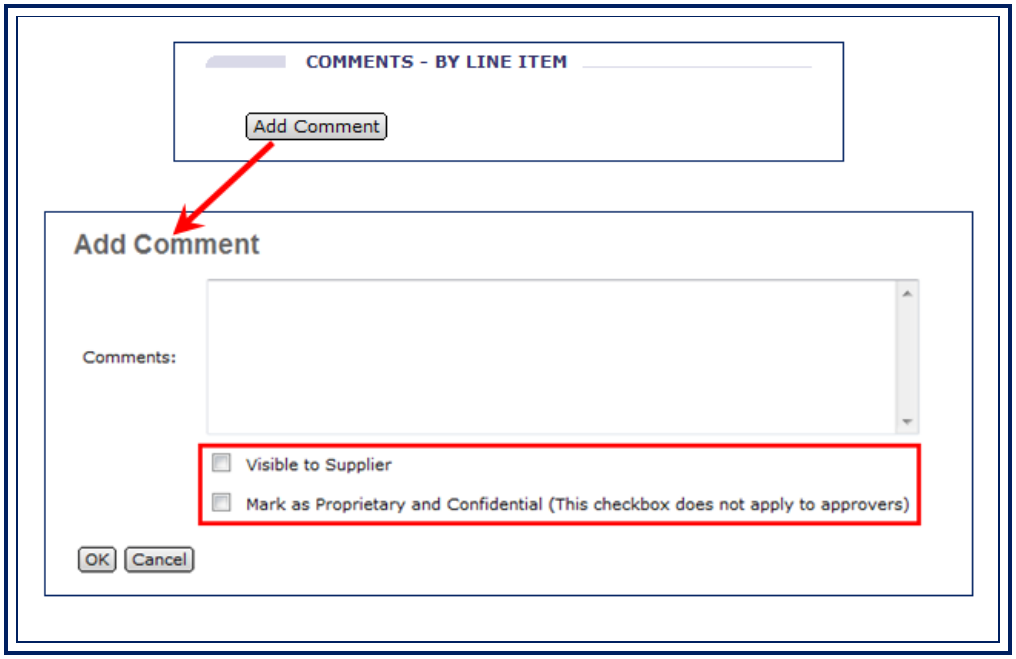
COMMENTS – BY LINE ITEM

You can add comments to a line item to provide additional details about your request; to do this, click the **Add Comment** button in the ***COMMENTS - BY LINE ITEM*** section (**Figure 83**).

Just like comments you add for the entire requisition, line item comments become a permanent part of the requisition. You can control who sees your comments by selecting one or both of the following check boxes:

- **Visible to Suppliers:** By default, comments appear on the requisition but not on the purchase order that is sent to the supplier. Select this check box if you want the supplier to see your comments on the purchase order.
- **Mark as Proprietary and Confidential:** By default, your comments can be viewed by anyone internal to your agency/entity who has access to the requisition. Select this check box to limit internal access to yourself and Approvers. Approvers can always view your comments; they can also add their own comments to the request.

Figure 83: Launching the "Add Comment" Dialog Box



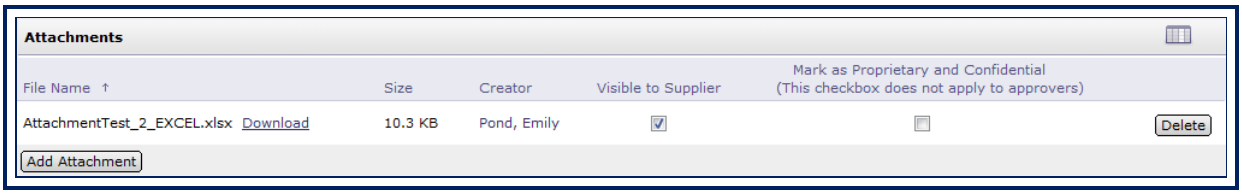
When you have entered your comment, click **OK** to return to the **LINE ITEM DETAILS** screen. Your time-stamped comment will be displayed there (**Figure 84**), and you will be able to edit or delete it from the **LINE ITEM DETAILS** screen.

Figure 84: Saved Line Item Comment

ATTACHMENTS – BY LINE ITEM

You can also add attachments specific to a line item. Click **Add Attachment** and follow the instructions given earlier in the section Attachments – Entire Requisition. When you return to the **LINE ITEM DETAILS** screen, a link to your attachment will be displayed there, and you will be able to change viewing options or delete the attachment from that screen.

Figure 85: Attachment Information Displayed on "Line Item Details" Screen



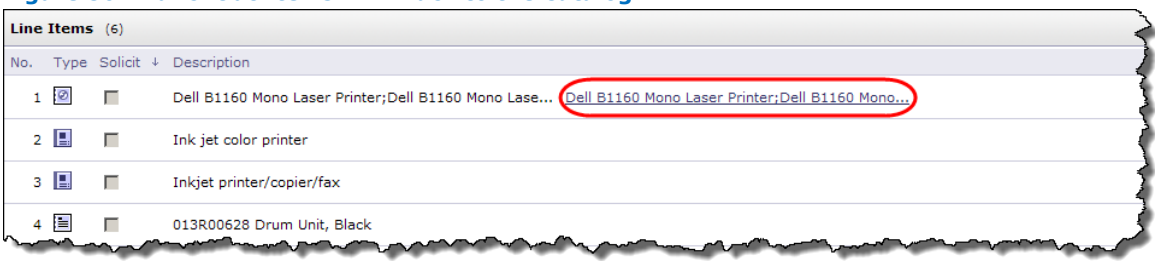
When you have completed all of your line item edits, click **OK** to review your modifications in the **CHECKOUT** screen.

EDITING PUNCHOUT CATALOG ITEMS

Because PunchOut catalogs do not actually reside in the eMall, you cannot edit PunchOut catalog items in your shopping cart (except for accounting information, which you can edit from the shopping cart). Just as you had to access the supplier's website to select goods from a PunchOut catalog, you must return to the supplier's website if you want to change your order.

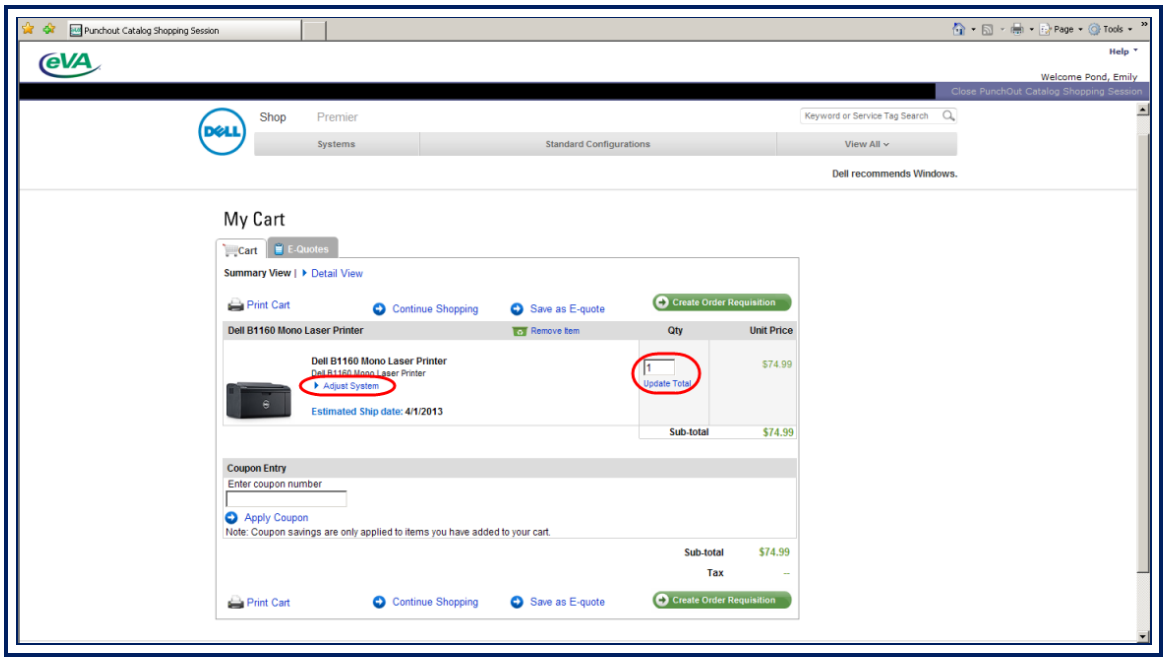
From the Line Items section of the Summary tab or from your shopping cart, locate the PunchOut catalog item you want to change and click the underlined description link, shown below in **Figure 86**.

Figure 86: PunchOut Items Link Back to the Catalog



In this example, the Dell catalog will open to show the B1160 Mono Laser Printer that is included in the requisition (**Figure 87**). Make your changes, making sure to follow any instructions for confirming those changes. When you are finished, click through the checkout process just as you did when you first selected the item. The changes you made will be reflected on your requisition.

Figure 87: Updating a PunchOut Catalog Item



Be aware that PunchOut catalogs differ from one another, just as one vendor's website differs from another's. Depending upon the catalog, you may find different buttons or links from those shown here.

MASS EDITING

Suppose you have been building a new requisition. You have added fifteen or twenty items to your shopping cart when you remember that half of the items need to be shipped to a different location. Instead of editing each item at the line level, you can save time by making the change to all of the items at once. You can edit any number of items this way, provided that you want to make the same changes to each one.

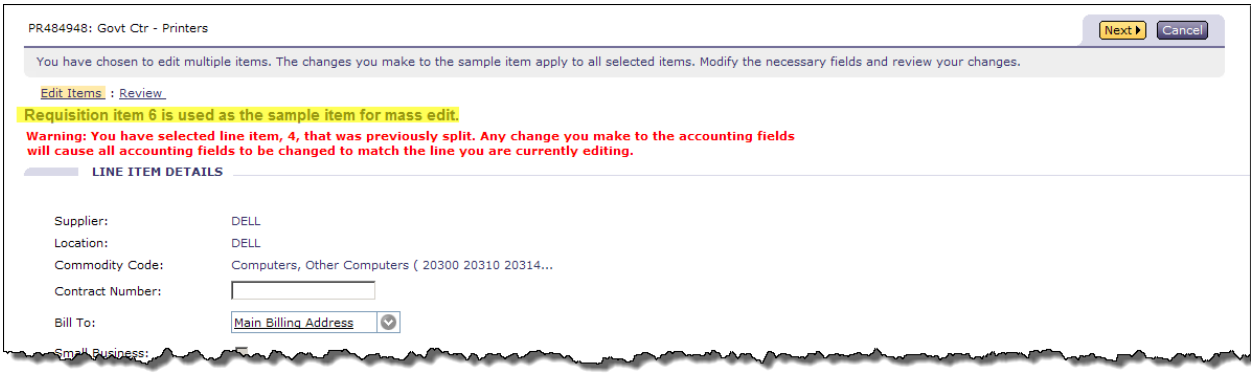
To edit multiple items at the same time, select each item you want to edit by clicking the checkbox next to it in the **Summary** tab or in your shopping cart. To edit **all** items at once, select the top checkbox, as indicated in **Figure 88**. When you have selected the items you want to update, click **Edit** to open the **MASS EDIT** screen.

Figure 88: Selecting Items for Mass Editing

The **MASS EDIT** screen displays information for one of the selected line items to use as a change template. In the example shown in **Figure 89**, the sample item is Requisition Item 6. Any changes you make to this line item will be applied to all of the selected line items.

Pay attention to any warnings that appear on the **MASS EDIT** screen; they will help you to avoid accidentally editing line items. For example, the warning shown in **Figure 89** indicates that one of the selected line items includes split accounting. If you find that you have selected an item that you do not want to include in the mass edit, click **Cancel** to return to the line item list.

Figure 89: Line Item Displayed as Sample on Mass Edit Screen

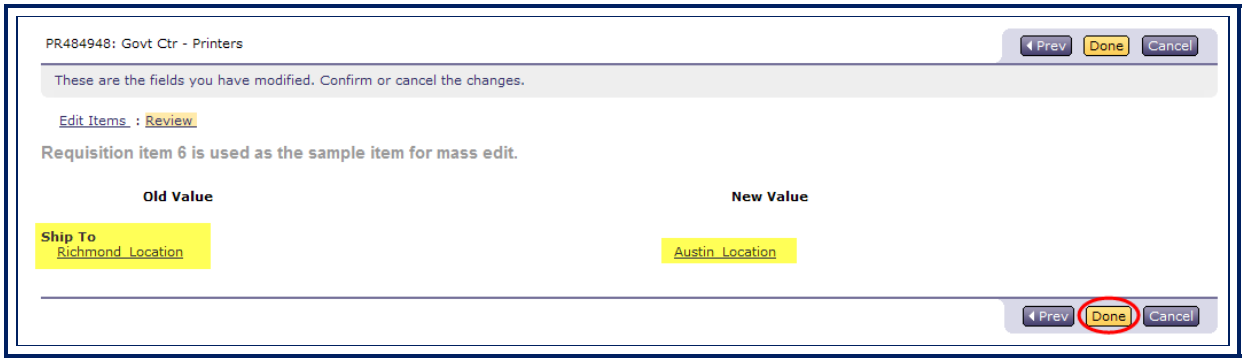


When you have finished your edits, click **Next.**

REVIEW MODIFIED FIELDS

The **EDIT ITEMS: REVIEW** screen displays a summary of the fields that you changed, showing the old and new values for each one (**Figure 90**). This gives you an opportunity to review your changes before finalizing them.

Figure 90: Reviewing Mass Edits



When you have finished reviewing your changes, click **Done** to return to the requisition **Summary** tab, where you can submit or exit the requisition.

9. SEARCHING THE eMALL

Before you search for catalog items, you might find it helpful to understand how you can control the way in which you view search results. The more you learn about searching the eMall, the better your results will be.

VIEWING SEARCH RESULTS

Figure 91 shows the controls that determine how your search results will be presented. These controls regulate:

- Number of results per page
- Sort Order
- View

Figure 91: Search Results Controls

For number of results per page, you can choose 20, 50, or 100 depending on personal preference and available bandwidth (20 results will load faster than 50, but 50 results per page means fewer pages to load).

"SORT BY:" OPTIONS

The **Sort By:** options allow you to view search results in several ways, as shown in **Table 12**.

Table 12: Sorting Search Results

Sort Option	Results
Relevance	• Best match to keywords • Default sorting option
Price	• Defaults to ascending order (lowest to highest) • Can be reversed by clicking the arrow next to the Price link
Bestselling	• By sales in descending order (highest to lowest)

Sort Option	Results
Name	• Alphabetically by supplier • Can reverse order by clicking the arrow next to the Name link

Regardless of the original sort order, you can re-sort your results at any time by clicking one of the other sorting criteria.

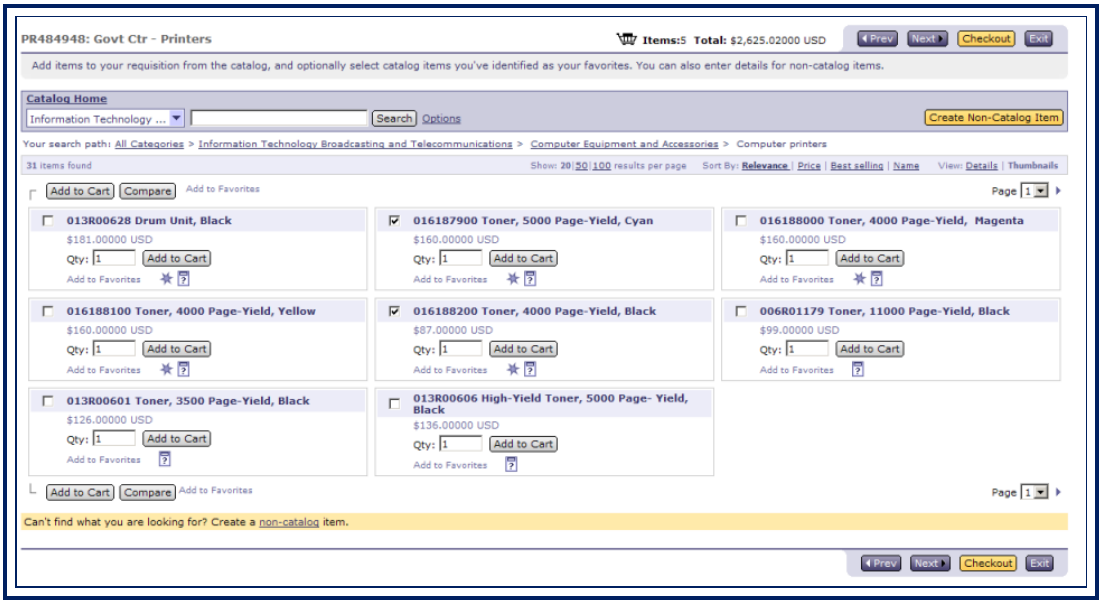
"VIEW" OPTIONS

You can choose between two views, details or thumbnails.

Thumbnails

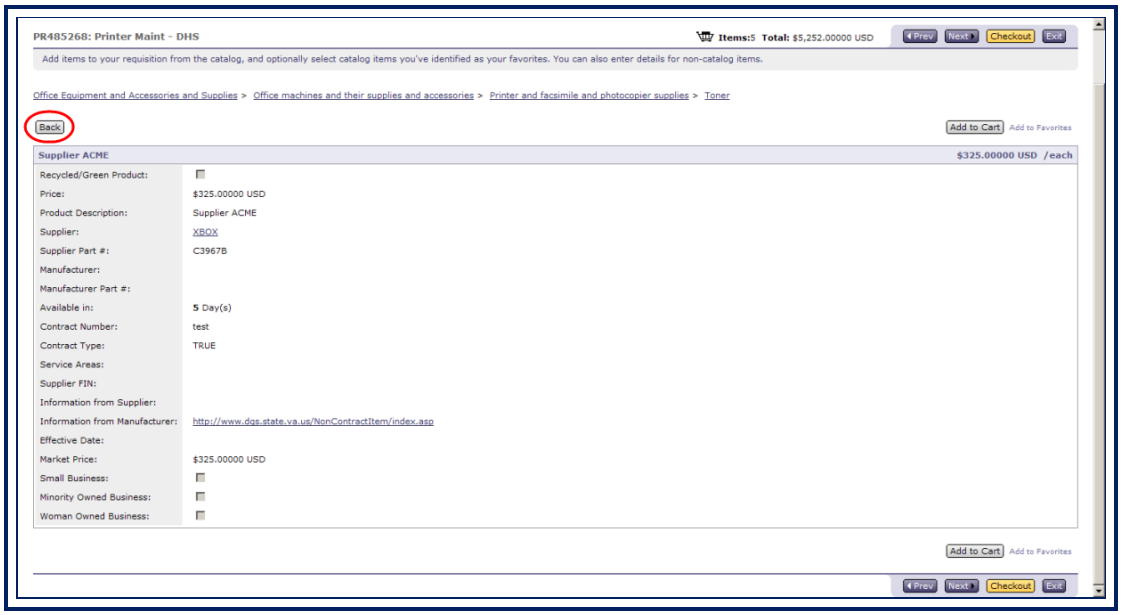
The Thumbnails view (**Figure 92**) shows the item description and price. It allows you to enter a quantity and add the item to your shopping cart.

Figure 92: Thumbnail View of Search Results



To view more information for a particular item, click the item description. A new screen will open to show all of the details provided by the supplier (**Figure 93**). When you have finished reviewing the product details, click **Back** to return to the catalog search results.

Figure 93: Individual Product Detail Screen

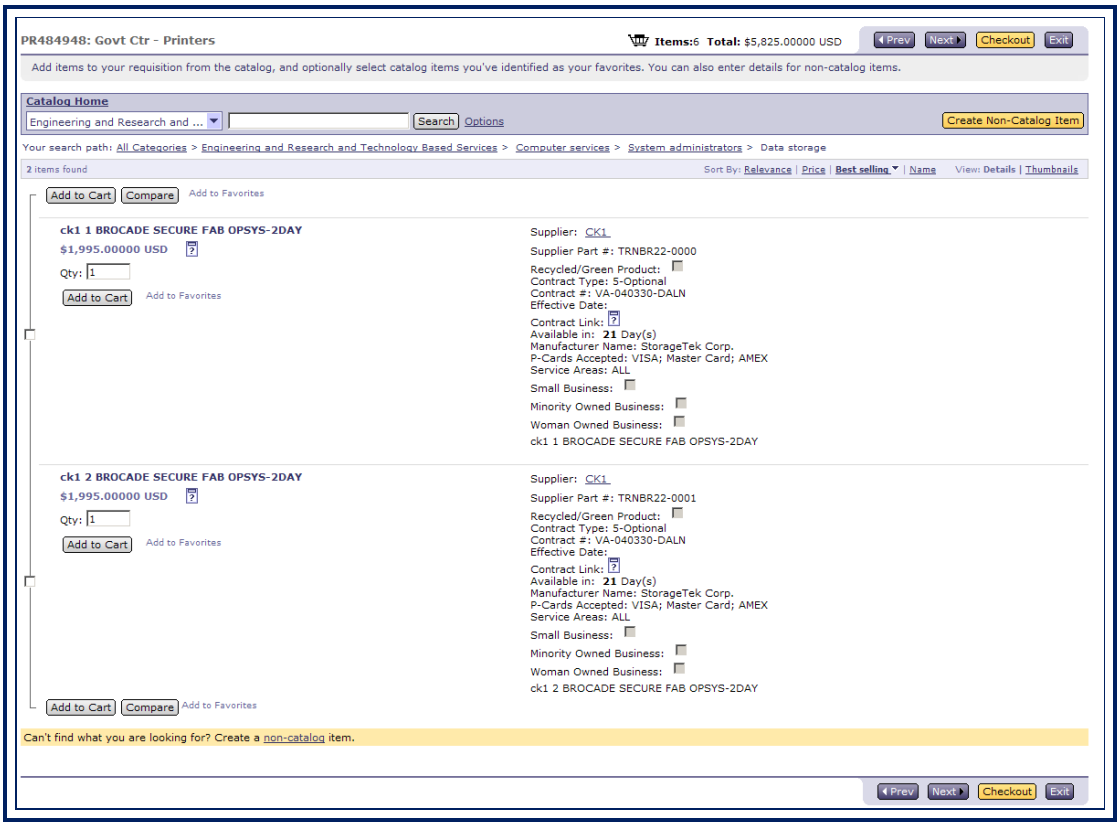


Details

The Details view (**Figure 94**) provides the same information as the Thumbnails view, as well as additional details, such as:

- Supplier
- Manufacturer
- Part Numbers
- SWAM designations
- Contract Number information

Figure 94: Details View of Search Results



VIEWING SUPPLIER DETAILS

Each item has a link to the supplier that provided the catalog item. Click the supplier name to view additional details; click **Done** to return to the item summary (**Figure 95**).

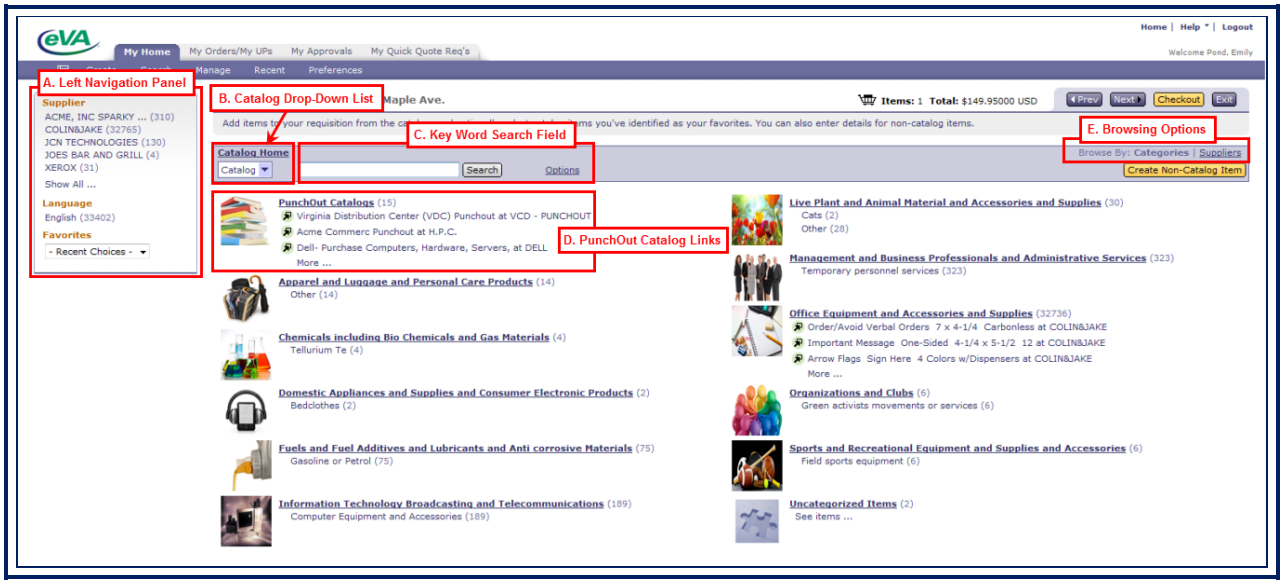
Figure 95: Click Supplier Name Link to See Details

CATALOG HOME SCREEN

Now that you have an understanding of the various display options for your search results, it is time to learn more about how to obtain them. Your searches will start at the **CATALOG HOME** screen (**Figure 96**).

Catalog items are categorized by commodity type. These categories are built dynamically, based on items currently available in supplier catalogs. In the default view of the catalog home page, product categories are displayed in bold text, with sub-categories displayed beneath them.

Figure 96: Catalog Home Screen



A LEFT NAVIGATION PANEL

On the Catalog Home screen, the left navigation panel works in conjunction with the browsing options (E.), which allow you to display either commodity categories (the default view) or suppliers. Whichever you choose, the left navigation panel presents the headings from the other format in expandable list form; for example, if your **CATALOG HOME** screen is displaying commodity categories, the left navigation panel offers a list of suppliers.

B CATALOG DROP-DOWN LIST

Commodity searches can be performed using the same procedure as such familiar websites as eBay or Amazon, drilling down through a hierarchy of commodity categories to get to a group of similar items. See Option 1: Drill Down Through Commodity Categories for detailed instructions.

You can select the catalog you want to search by clicking the appropriate link on the Catalog Home screen. You can also select from the **Catalog Drop-Down** list, which allows you to move from one catalog to another without returning to the **CATALOG HOME** screen.

C KEYWORD SEARCH FIELD

Keyword searches are probably familiar to you from using Internet search engines. They use a single text box into which you enter the search terms ("keywords") most likely to return the results you need. Keyword searches allow you to find items by matching specific words, supplier names, contract numbers, or product numbers. For more information, see Option 2: Search by Keywords.

Advanced search options provide detail fields that allow you to refine a search. See Option 3: Advanced Search for more information.

D PUNCHOUT CATALOG LINKS

Use the PunchOut Catalog links on the **CATALOG HOME** screen to navigate to a PunchOut catalog, where you will be able to execute keyword searches on the supplier's website.

E BROWSING OPTIONS

Using the Browse By links, you can choose to display either commodity categories (the default view) or suppliers on this screen.

HOW TO FIND ITEMS

The sections below provide details about how to use the various search tools available on the **CATALOG HOME** screen.

OPTION 1: DRILL DOWN THROUGH COMMODITY CATEGORIES

Select the highest level of one of the displayed categories and drill down through the sub-categories to find the specific set of items you want.

Figure 97: Starting a Drill-Down Search

To find your specific item within a broad category of commodities, drill down through the levels of subcategories, as shown in **Table 13.**

Table 13: Drill-Down Category Levels

Catalog Level	Example
Segment	Lighting and Electrical Accessories and Supplies
Family	Lamps and light bulbs and lamp components
Group	Lamps
Category	Fluorescent lamps

Not all items have been identified down to the Category level. You will know you have drilled all the way down in a particular category when the returned screen contains individual items rather than a set of links.

If you prefer to search by supplier name, you can

- Use the links provided in the left navigation panel
- Use the **Browse By** options to change to the **Supplier** view

Refer to **Figure 96 A** and **E** for an illustration of these features.

eVA will display the results set in either detail or thumbnail format, depending on which view you have selected.

eVA will also display the path you took to get to an item listing as a series of links. The links that make up such paths are often called *breadcrumbs*, because they make a trail you can use to return to any earlier level on the path by clicking the appropriate link. In **Figure 98**, the search path used to reach the displayed listing is *Entire Catalog > Live Plant and Animal Material and Accessories and Supplies > Live animals > Livestock > Dogs*.

Figure 98: A Search Path Composed of "Breadcrumbs"

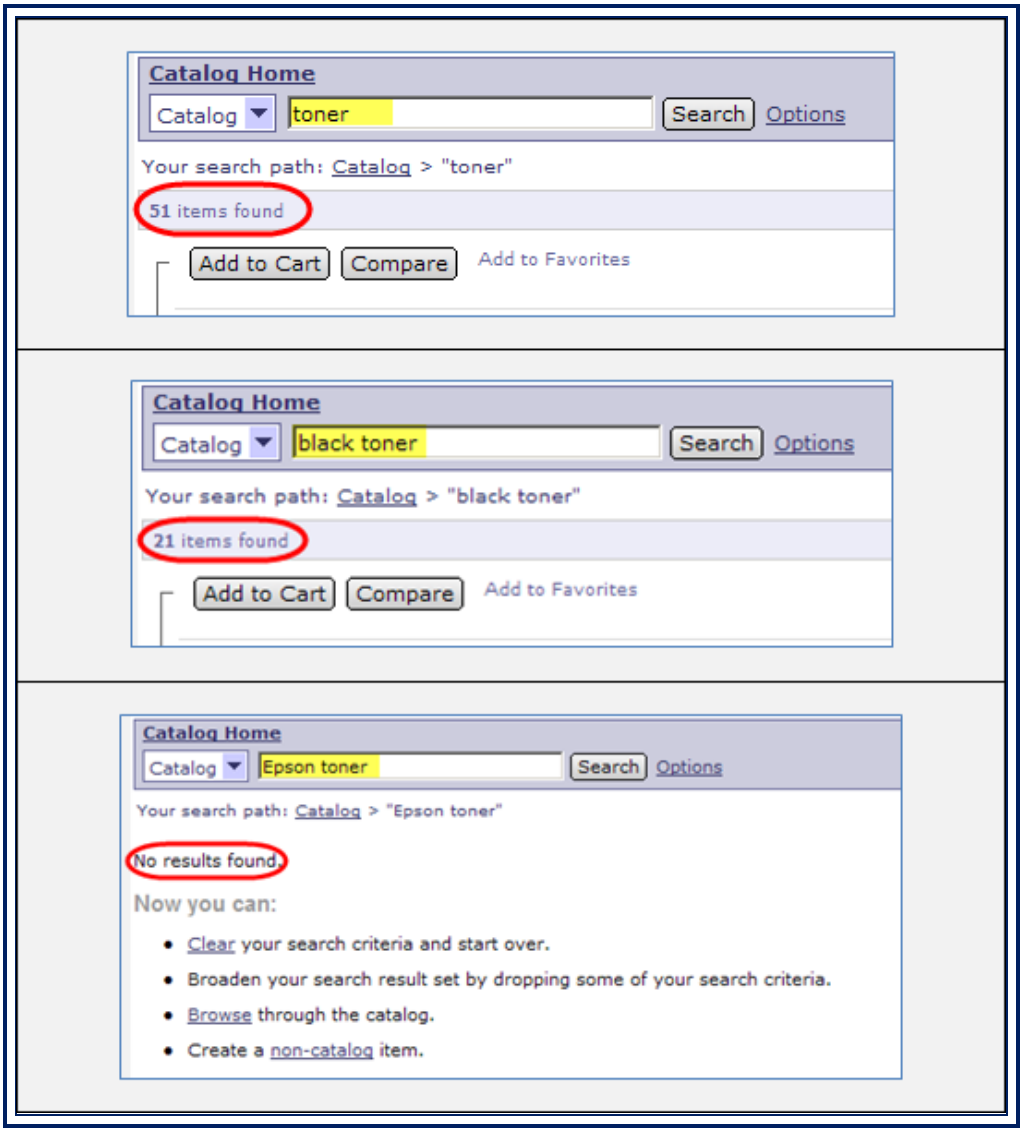
OPTION 2: SEARCH BY KEYWORDS

Keyword searches use a single text box into which you enter the search terms ("keywords") most likely to return the results you need. If you choose terms that are too broad, the system can return an unmanageable number of results; if your terms are too narrow, you might not get any results.

Figure 99 demonstrates this concept. A search for *Toner* returns approximately 51 items (remember that even if you enter exactly the same search terms, you might get a different number of results because of the dynamic nature of the eMall). If you narrow your search by specifying *Black Toner* in the search field, the number of results falls to a more manageable 21; however, an even narrower search for a specific brand of toner returns no results.

If there is only one acceptable result, then a narrow search allows you to quickly discover whether the item you need is available through a catalog or if you must enter it as a non-catalog item; however, if you have more leeway, then too narrow a search can eliminate valid options.

Figure 99: Searching with Keywords



The keyword search is also the most efficient means of locating a specific supplier.

AND/OR Logic

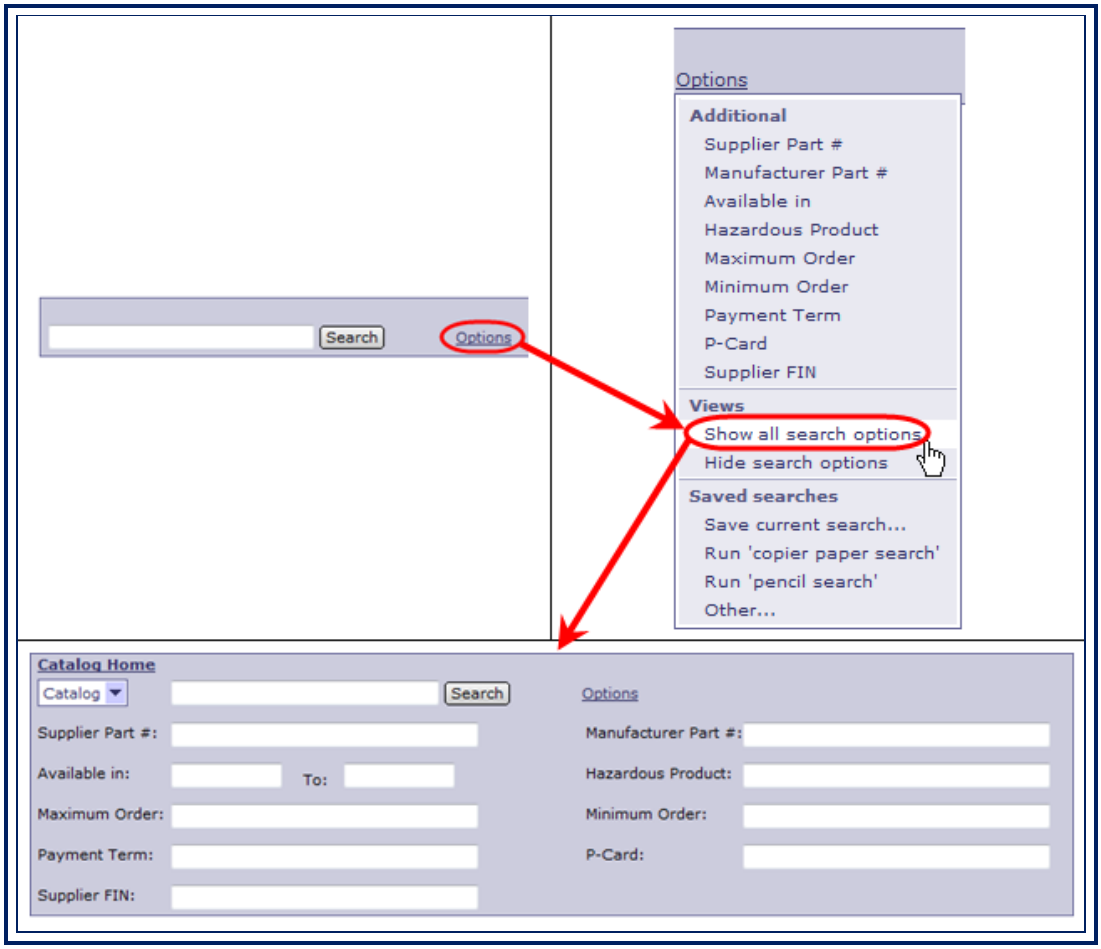
If you enter more than one word in a search field, you are telling the search engine that you want only results that contain *all* of those words. For example, if you enter *Apple Macintosh*, eVA might return only Apple, Inc.'s Macintosh computers and its family of parts or peripherals.

If you are trying to find results that include *any* of the words you entered, you must specify OR between words. In this case you would enter Apple OR Macintosh. eVA will then return all entries for apples and all entries for Macintosh.

OPTION 3: ADVANCED SEARCH – KEYWORDS PLUS OPTIONS

You can create a more specific search using the additional search tools under the **Options** menu. Click the Options link, and then select one of the additional search fields from the menu that opens (**Figure 100**). Note that you can select only one field at a time. If you want to use more than one additional parameter in your search, select *Show all search options* to expand the **Search** section.

Figure 100: Use Options Menu to Display All Search Options

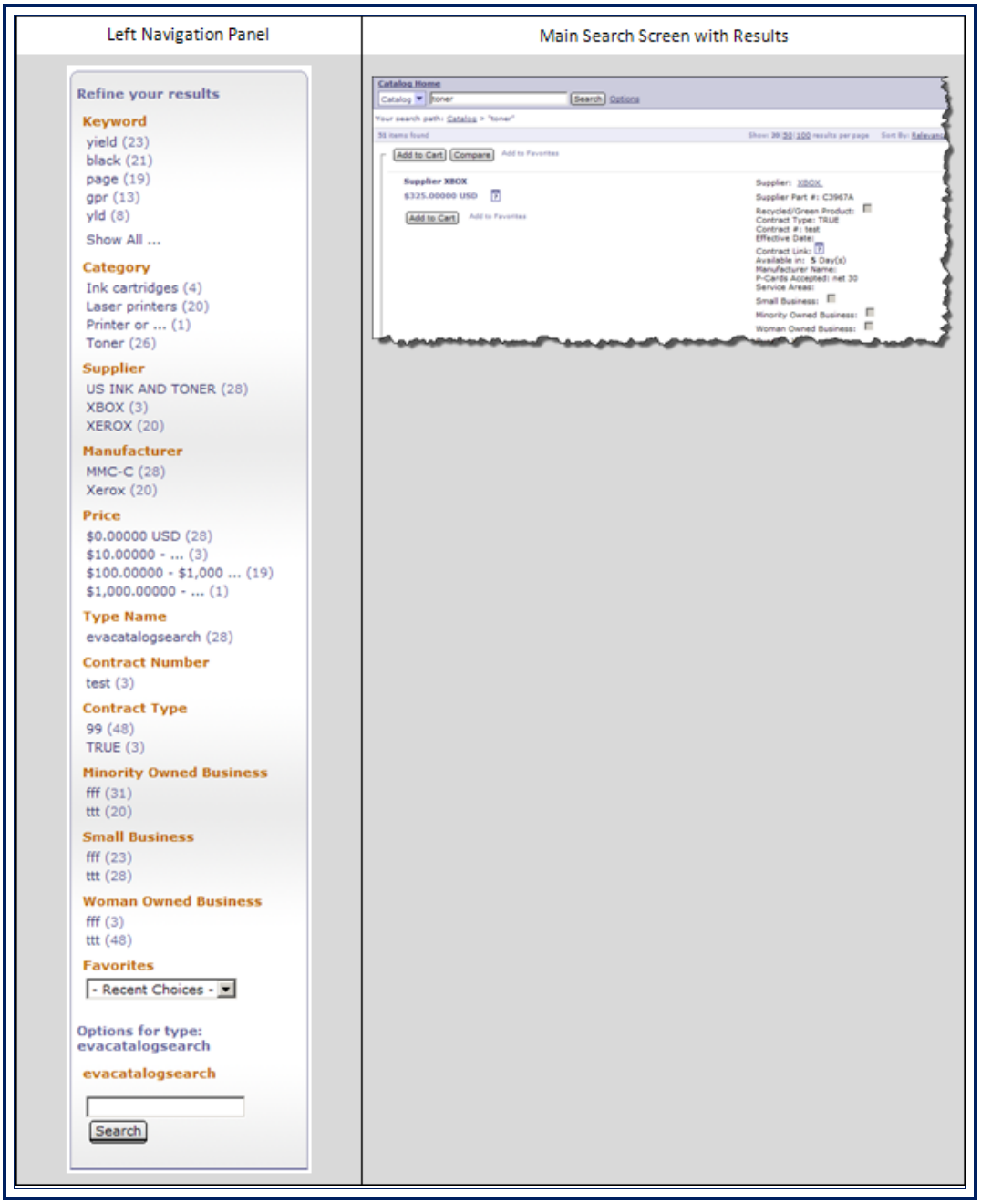


These additional options fields will be visible under your search textbox until you return to the **Options** menu and clear them. Even when selected, these additional search fields are never required; you can use any or none of them, in conjunction with or separately from the original keyword **Search** field.

Refining Search Results

You can refine your search results using selections from the **SEARCH** screen left navigation panel. Going back to the example used in the Search by Keywords section, enter the word "toner" in the keyword search field and click **Search**, but this time, when the results appear, look at what happens in the left navigation panel (**Figure 101**).

Figure 101: Dynamically Generated Left Navigation Panel



The left navigation panel on your **SEARCH** screen is dynamically generated from the results set created by your query. As shown in **Figure 101**, the first section is a list of keywords in descending order of frequency, followed by other groupings such as category and price.

Table 14 describes the kinds of search criteria you can choose in the left navigation panel.

Table 14: Types of Search Criteria Found in Left Navigation Panel

Search Criteria	Definition
Keyword	• In this context, a keyword is a descriptive term designed to narrow a specific set of search results • Listed in descending order of frequency NOTE: Keywords might or might not be present, depending on the number of items in the results set.
Category	• The most granular level of commodity hierarchy • Search results may include items from several categories
Supplier	• Narrows search to only those items available from a particular supplier
Manufacturer	• Narrows search to only those items produced by a particular manufacturer
Price	• Narrows search by price • Displayed in bands, such as $0 - $10.00, $10.00 - $100.00, etcetera
Type Name	• Search terms made available by the vendor to help buyers find what they are looking for in a catalog
Contract Number	• Narrows search to specified contract number
Contract Type	• Sorts by contract type such as Agency, Mandatory, Optional, and so on
Minority Owned Business	• Narrows search to items available from minority-owned businesses
Small Business	• Narrows search to items available from small businesses
Woman Owned Business	• Narrows search to items available from woman-owned businesses
Micro Business	• Narrows search to items available from micro businesses

The attributes listed in the left navigation panel after a search often provide different results than the same attributes would produce if used as the criteria for a new search.

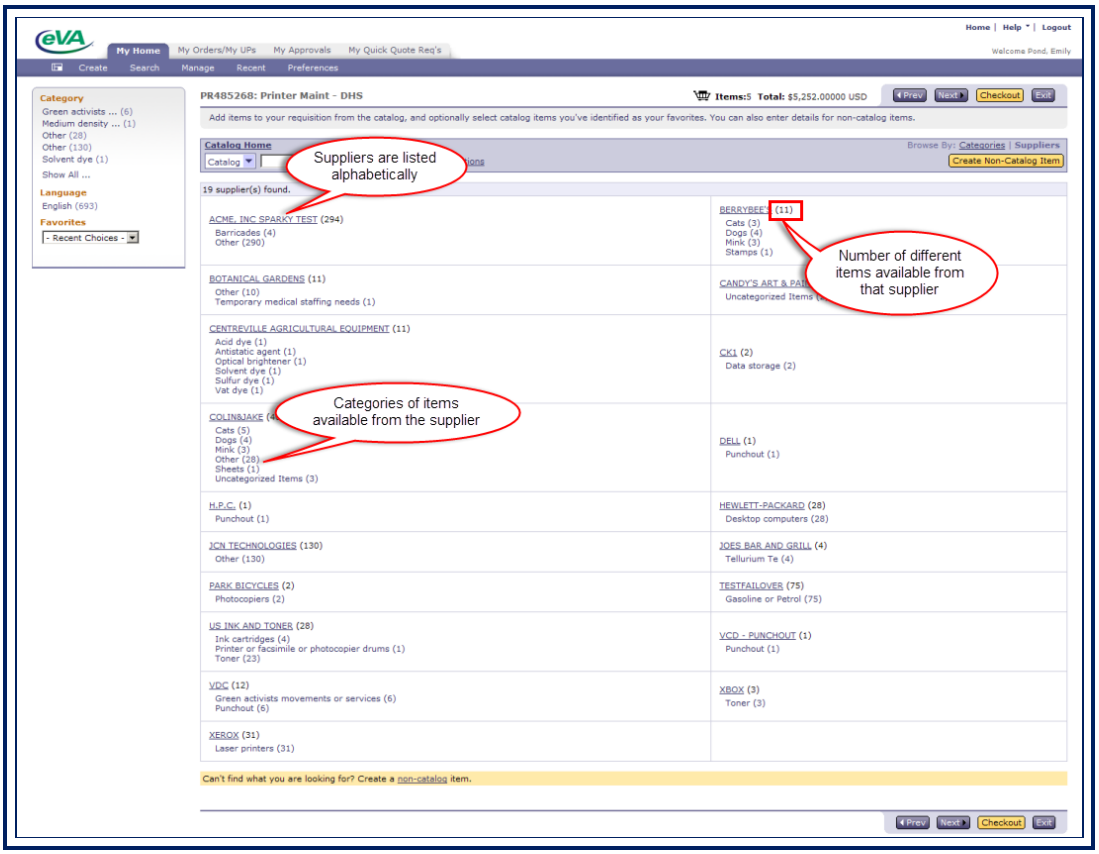
For example, if you start a new keyword search with the word *yield*, your results will probably include a jumble of agriculture-, construction-, and office-related items. However, if you have already searched for toner and now want to narrow the results to return only toner cartridge listings that specify how many pages a given cartridge will print, selecting the keyword 'yield' will produce those results.

OPTION 4: BROWSE FOR ITEMS BY SUPPLIER

As mentioned previously, you can change the **CATALOG HOME** screen from the default **Catalog** view (**Figure 96**) to the **Supplier** view (**Figure 102**). Suppliers will be listed alphabetically, each displaying a list of the categories of items available from that supplier.

This display option offers an excellent way to "window shop" the eMall, just getting a feel for participating suppliers and the kinds of commodities they carry.

Figure 102: Catalog Home Screen Organized by Supplier



SEARCH STRATEGIES

When you begin to shop for specific items among the millions of available catalog items, you will need a search strategy. Your search strategy will depend on the kind of shopping you need to do.

If you are looking for a specific item, you will want to create a very narrow search. Entering a contract number, part number, or supplier name will usually take you to exactly what you want.

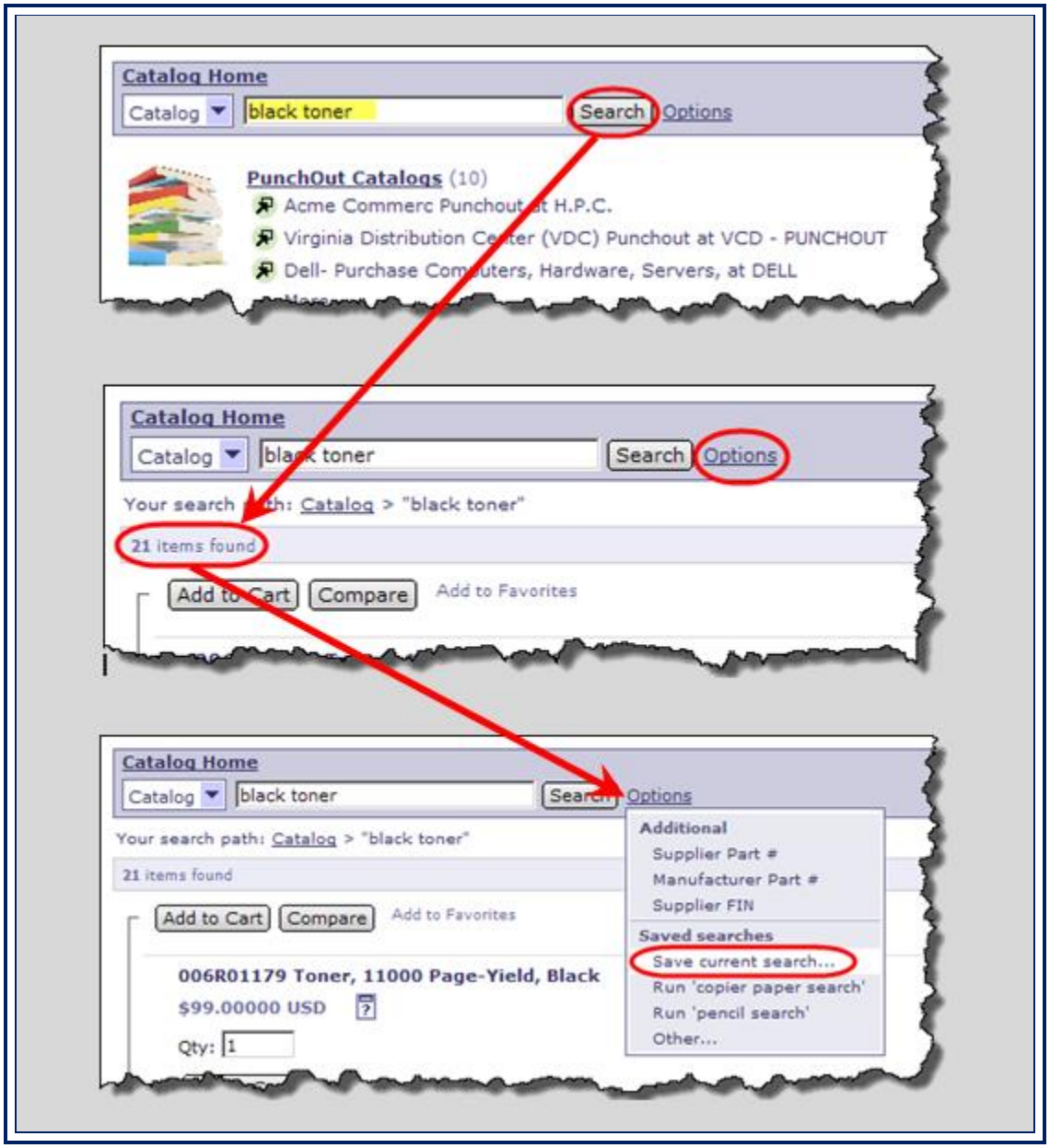
On the other hand, if you are shopping for a best buy with only general requirements to meet, you will want to broaden your search to include items that generally identify what you want, probably by using commodity categories or general keywords.

If that strategy produces too many results, then you can gradually narrow your search using the left navigation panel prompts until a manageable number of results is returned.

SAVING A SEARCH

There are a number of reasons you might want to save a search to reuse in the future. After you run a search that return the results you want, open the **Options** menu and select *Save current search …* (**Figure 103**). You will be prompted to name the search. Enter a descriptive name and click **Save** to return to the search results.

Figure 103: Saving a Search



If you have saved past searches, you can access them by clicking the **Options** menu on the **CATALOG HOME** screen and then selecting the desired search (**Figure 104Error! Reference source not found.**). After the search has run, add the item(s) you want to your shopping cart.

Figure 104: Running a Saved Search

FAVORITE ITEMS

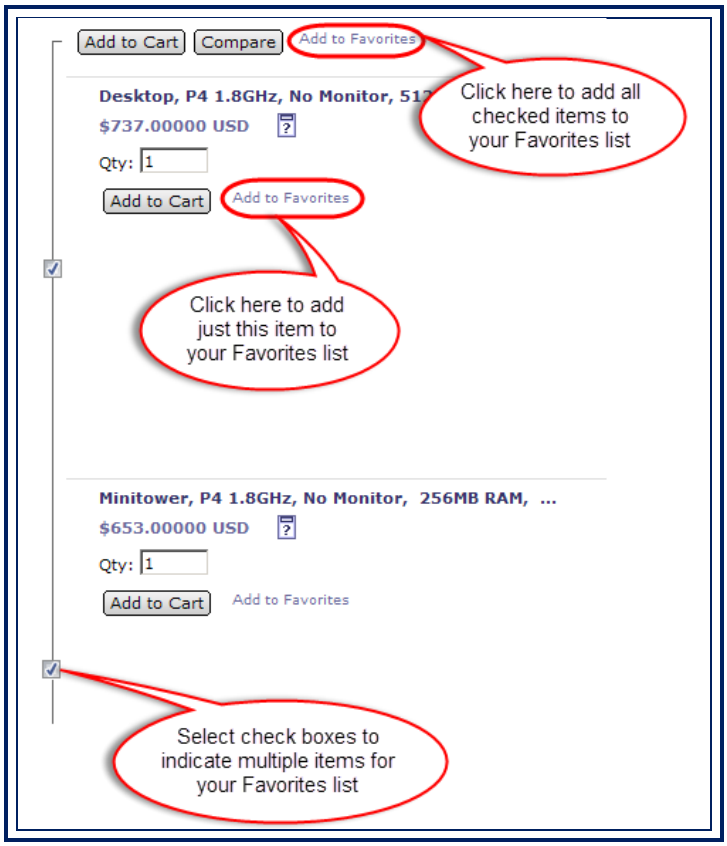
As mentioned in the section on Adding Items to your requisition, if there are catalog items that you order frequently, you can mark these items as Favorites so that you can find them quickly and easily when you are ready to purchase them again.

ADDING ITEMS TO FAVORITES

After you perform a successful search, you can add one or more of the items in the results set to your Favorites list (**Figure 105**).

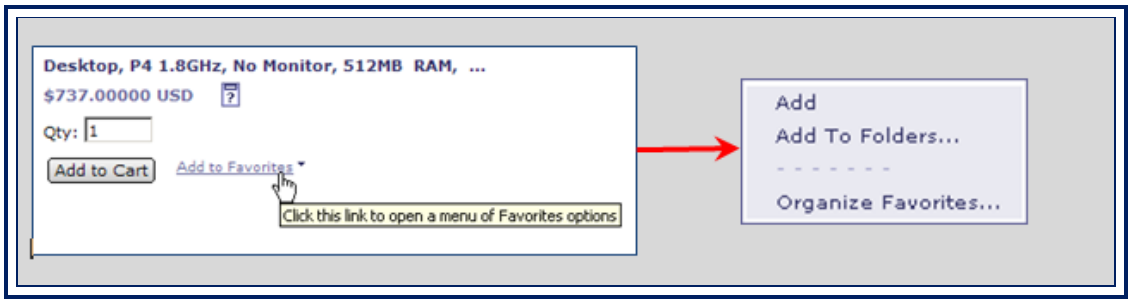
To add a single item, click the Add to Favorites link next to the **Add to Cart** button in the item description. You can add multiple items at one time just as you would choose multiple items for your shopping cart: select the checkbox next to each item you want, and then click the **Add to Favorites** link near the top of the screen.

Figure 105: Add Individual or Multiple Items to Favorites



You can also add an item to your Favorites list from the item's **PRODUCT DETAIL** screen. When you click any Add to Favorites link, the **Favorites Options** menu will open (**Figure 106**).

Figure 106: Click Link to Open Favorites Options Menu



If you are familiar with the way Favorites or Bookmarks work in your internet browser, you will recognize the design of the **Favorites Options** menu. You can opt to place the new favorite in a folder you have already created, or to create a new Favorites folder (both accessed by selecting *Add To Folders*), or you can add it to your Favorites list without placing it in a folder (by selecting *Add*).

CREATING A NEW FAVORITES FOLDER

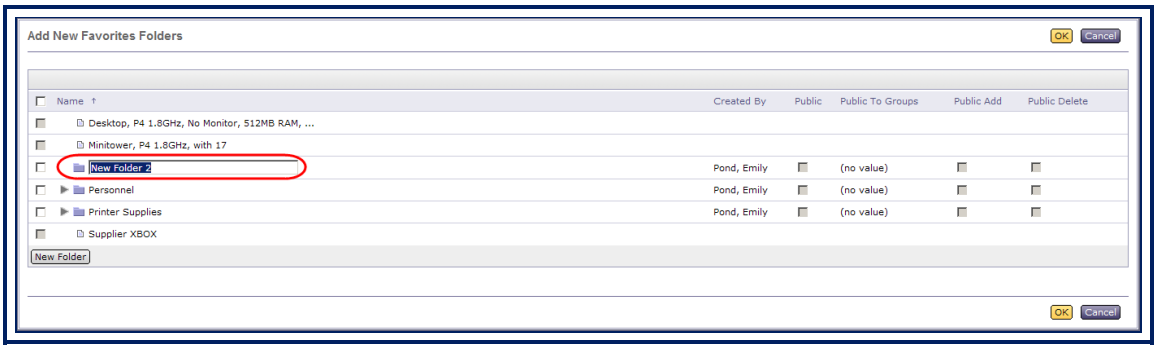
There are two ways to create a new Favorites folder. If you have found an item that you want to mark as a favorite but you do not have an appropriate folder for it, start by selecting *Add to Folders* from the **Favorites Options** menu. Then, when the **ADD FAVORITES TO FOLDERS** screen opens (**Figure 107**), click **New Folder**.

Figure 107: Creating a New Favorites Folder

The new folder will be created with an editable, generic name. In the example shown in
.

Figure 108, the temporary folder name is *New Folder 2*.

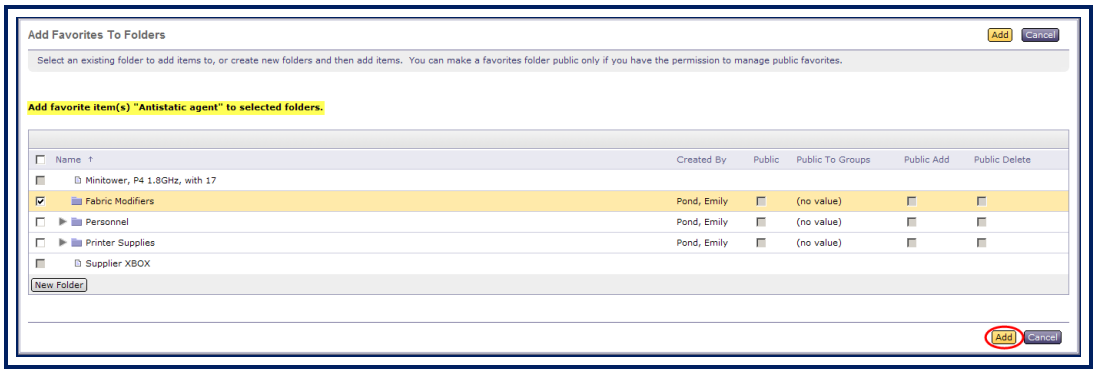
Figure 108: New Favorites Folder Added as 'New Folder 2'



Select the assigned generic name and change it to a name that is descriptive of the contents you plan to store in the folder. When you are finished, click **OK** to return to the **ADD FAVORITES TO FOLDERS** screen. Your new folder will be selected and you will see a confirmation message near the top of the screen, as shown in **Figure 109**.

Click **OK** to add the item to the newly created **Favorites** folder.

Figure 109: Adding Item to New Favorites Folder



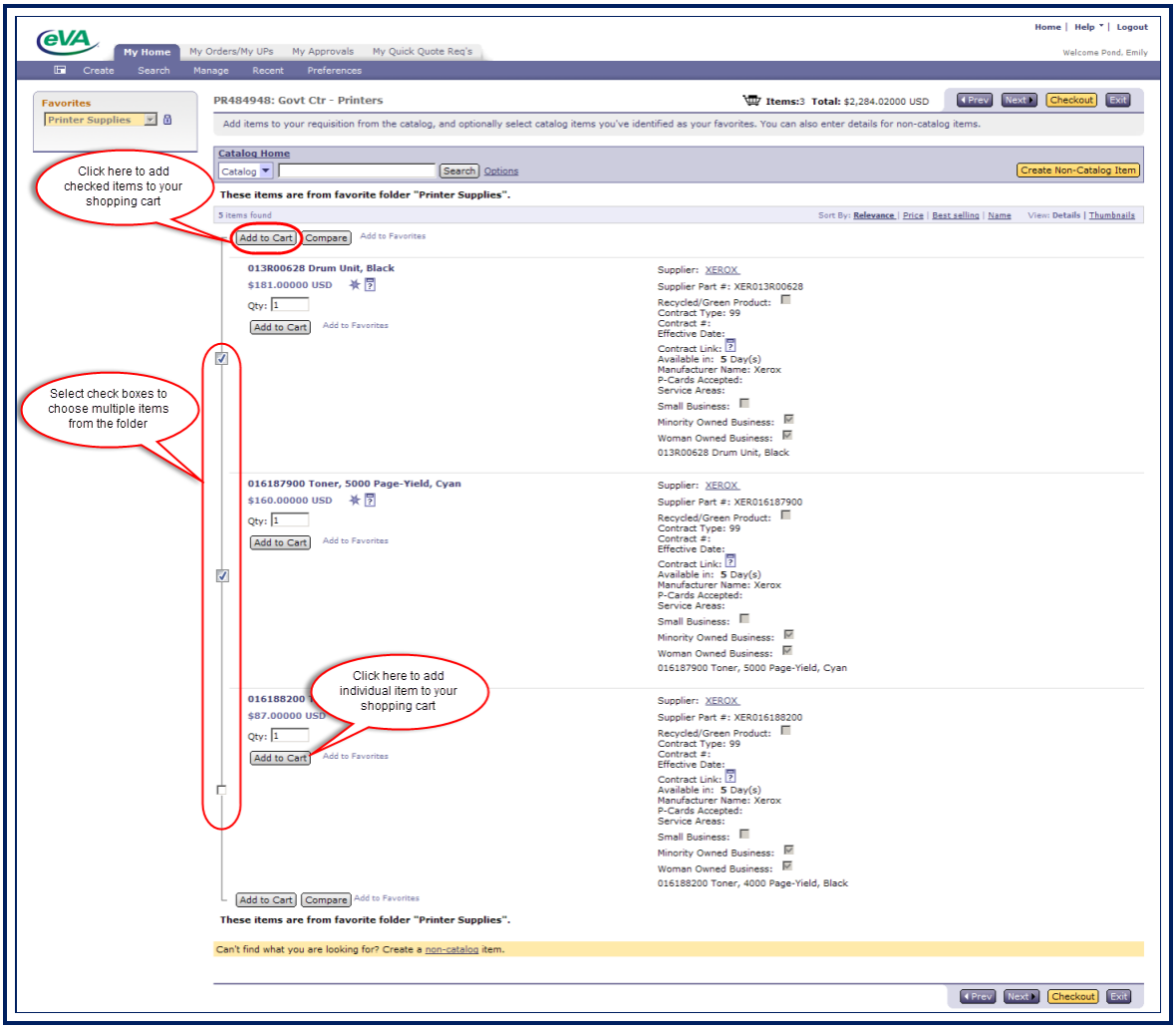
ADDING A FAVORITE ITEM TO A REQUISITION

Starting from an open requisition, go to the **CATALOG HOME** screen (**Figure 32**). The **Favorites** drop-down list appears at the bottom of the left navigation panel. Click the down arrow to see your Favorites folders, as shown in **Figure 110**.

Figure 110: The Favorites List Appears on the Catalog Home Screen

Select a folder from the drop-down list to display its contents (**Figure 111**).

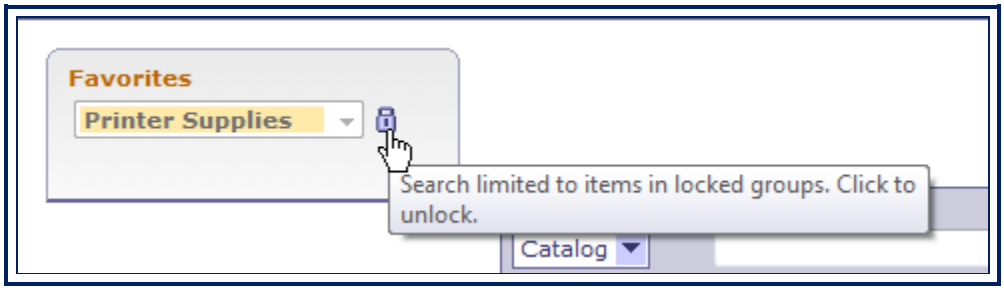
Figure 111: Contents of Favorites Folder



You can add an individual favorite item to your shopping cart, or you can choose multiple items from the open **Favorites** folder and add them all at once, as shown in **Figure** 111.

When you open a **Favorites** folder, the selection field will lock, indicated by a small padlock icon (**Figure 112**). If you want to look in a different Favorites folder, or change to another search method, you must first click the padlock to unlock the field.

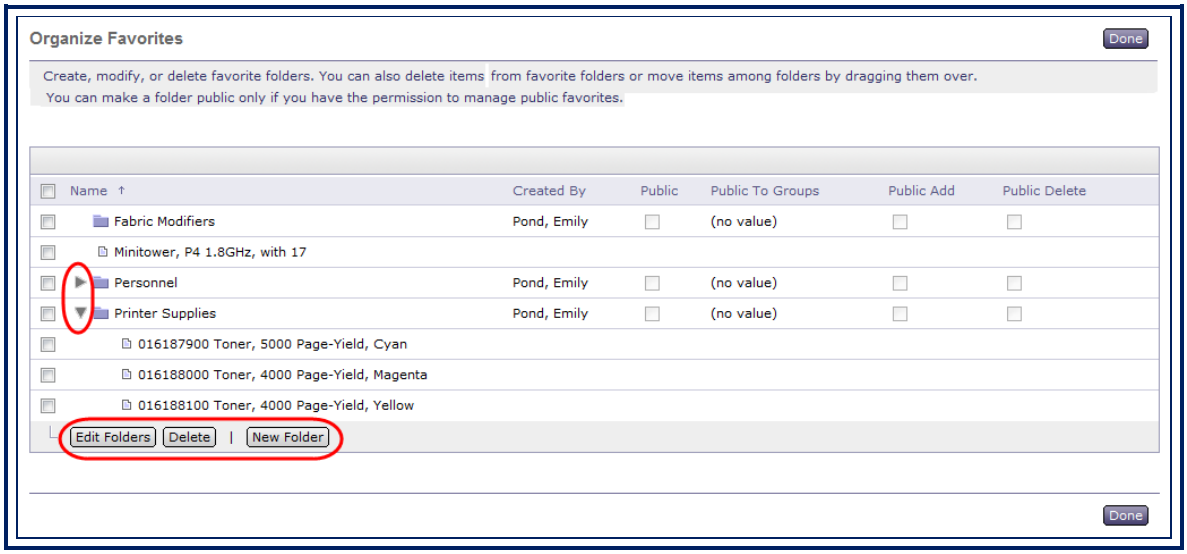
Figure 112: Locked Favorites Field



ORGANIZING FAVORITES

Select *Organize Favorites* from the **Favorites Options** menu to open the **ORGANIZE FAVORITES** screen. From this screen, you can edit or delete existing Favorites folders, and create new folders (**Figure 113**). An arrow next to a folder name (▶) indicates that the folder contains items. (Note that the **Public Add** and **Public Delete** functionality shown in **Figure 113** is not in use at this time.)

Figure 113: Organize Favorites Screen

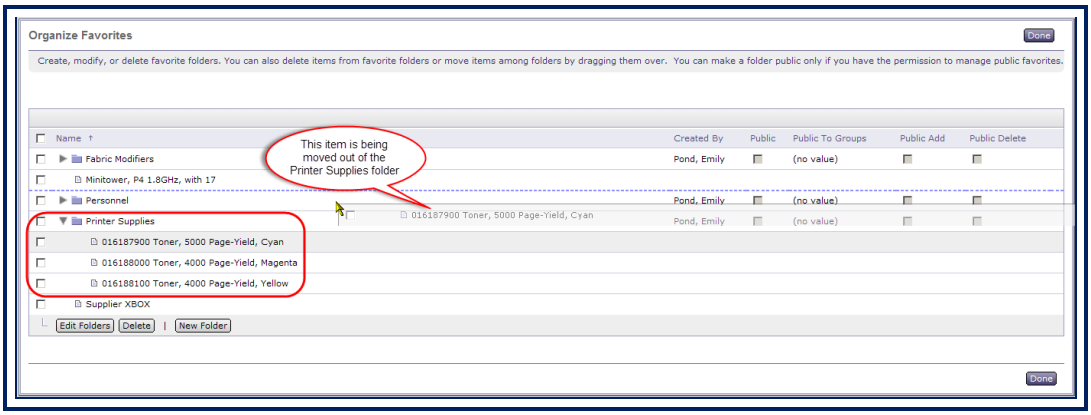


Click the arrow to see the contents listed under that folder's name. You can select any item to edit or delete it.

You can move items into or out of folders and from one folder to another; click to select the item and hold the mouse button to "drag and drop" it to the new location. **Figure 114** shows a folder that has been expanded to display its contents as well as an item in the process of being moved.

NOTE: *When a vendor discontinues an item and removes it from the catalog, the item will also disappear from any favorites folders in which it had been saved.*

Figure 114: Drag and Drop to Move Favorite Items



10. APPROVING THE REQUISITION

Most requests require approvals. Approvals are automatically assigned based on:

- The user's profile.
- The business rules of the user's agency or organization.
- The dollar amount of the requisition.

Approvals are usually handled by a group of users who have been assigned an approval role. Generally, any user who is a member of that group can approve a requisition, but this is not always the case. Depending on your agency/entity, you might encounter requisitions that must be approved by a specific individual. (NOTE: If the approval flow displays an approval role name instead of an individual, clicking the role name will allow you to view the names of the individuals assigned to that role.)

A final approval is also required when a supplier cannot receive orders electronically. In that case, an approval is added at the end of the approval flow as a reminder to the preparer that an order must be printed and faxed or mailed to the supplier.

Approvers are notified by email when a requisition is awaiting their approval (**Figure 115**).

Figure 115: Example of Notification Email

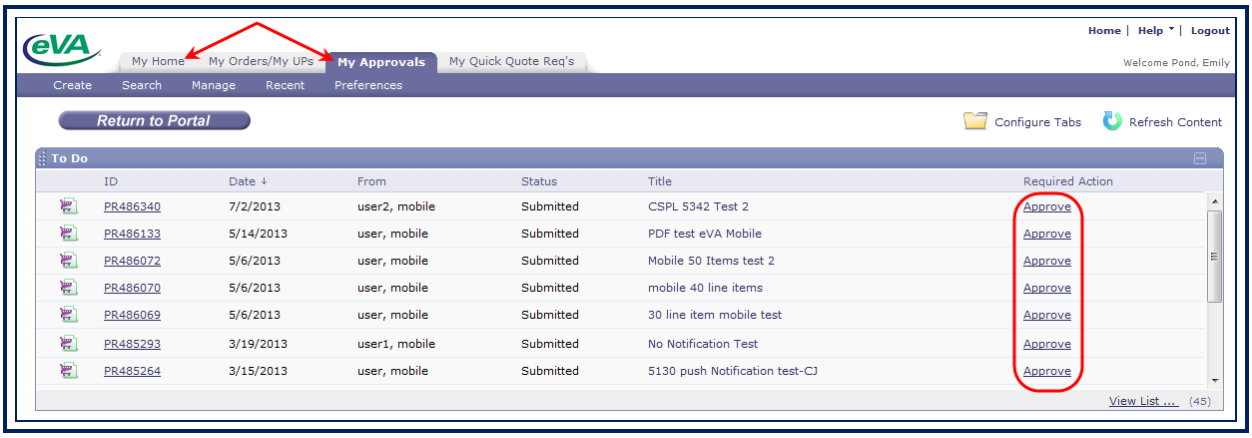
ACCESSING APPROVALS

If you are a designated Approver, and you want to access the **APPROVAL SUMMARY** screen for a particular requisition, click the Approve link next to that requisition in your **To Do** list on the **My Home** tab or the **My Approvals** tab (**Figure 116**).

> ***IMPORTANT!*** *Use the* ***Approve*** *link,* ***not*** *the* ***Requisition ID****, to access the* ***APPROVAL SUMMARY*** *screen.*

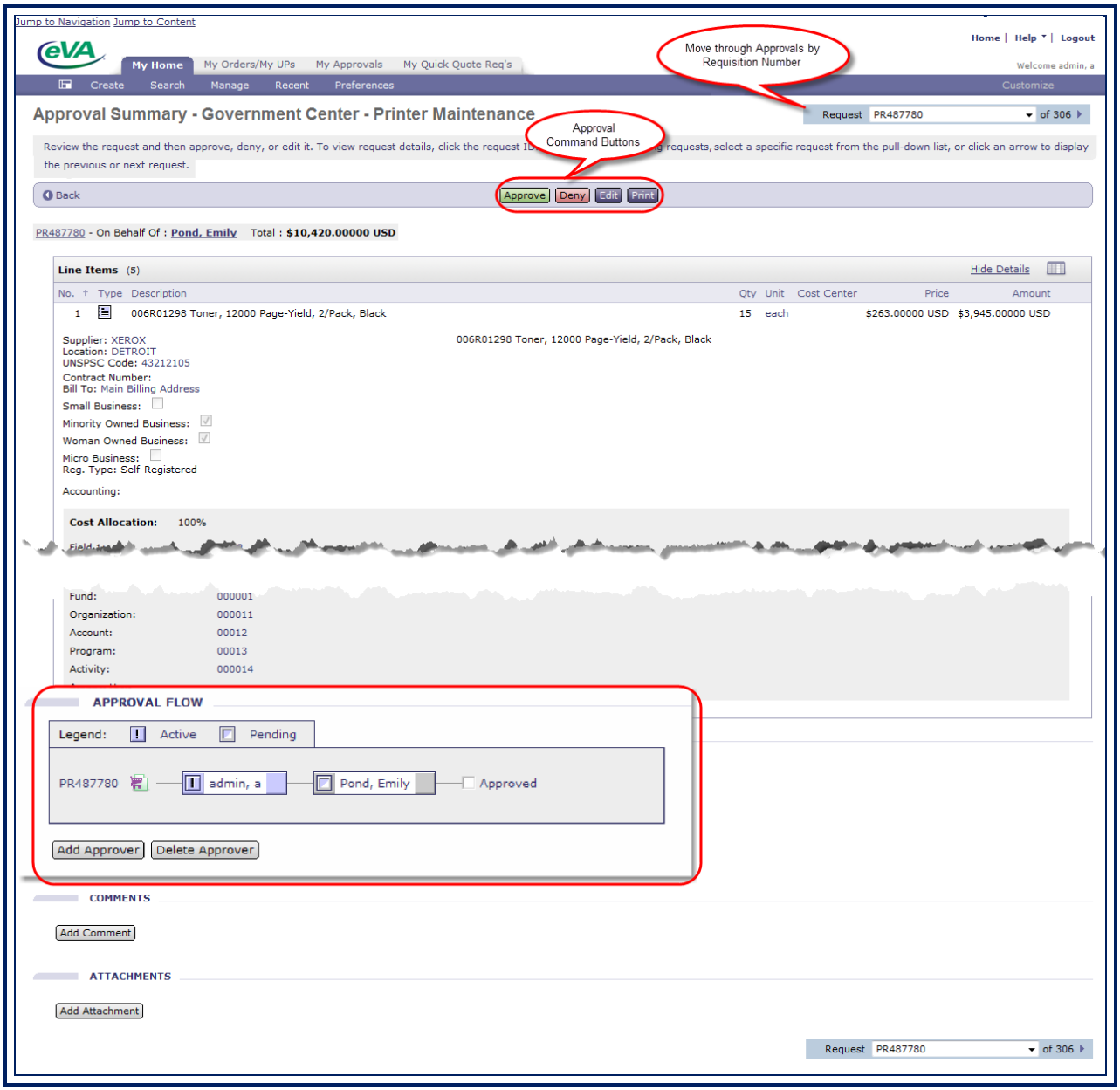
If you use the **Approve** link, you will be able to see all of the accounting details for each line item on the **APPROVAL SUMMARY** screen. If you access the transaction by clicking the **Requisition ID** instead, you will have to drill down into each line item to see the accounting details.

Figure 116: Approvals Accessed via My Home or My Approvals Tabs



The **APPROVAL SUMMARY** screen (**Figure 117**) contains all of the information you need to make an approval decision for that requisition, including a detailed list of the line items ordered, the approval flow for the requisition, and any comments the preparer has added.

Figure 117: Approval Summary Screen



APPROVING REQUISITIONS (NEW AND CHANGED)

Before you approve a requisition, you will want to review it carefully. Small details can become big problems when mistakes go unnoticed.

Although the **APPROVAL SUMMARY** screen displays most requisition details, it does not show everything. If you want to review information that is not on the **APPROVAL SUMMARY** screen (such as Shipping details), click the Requisition Number link that appears above the first line item (**Figure 118**).

Figure 118: Requisition Number Links to Summary Tab for Complete Details

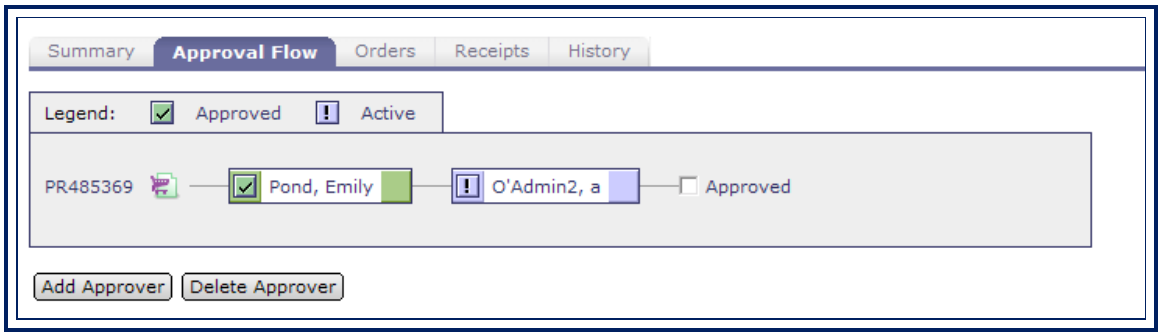
Table 15 provides a list of key details to review.

Table 15: Approval Review Guide

Detail to Review	Impact on Approval
Account Codes	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.
Dollar value of requisition	• Evaluate the total dollar amount of the requisition.
Bill To & Ship To	• Verify that the addresses are correct for each line item.
Comments	Comments might provide specific details about what is being purchased and why. • Verify the details and whether the comments will be included on the purchase order. • If they are to be included on the purchase order, the **Visible to Supplier** checkbox must be selected. • Also review comments inserted by prior approvers.
Attachments	Attachments also might provide specific details about what is being purchased and why. • Verify the details and whether the attachment(s) will be included on the purchase order. • If they are to be included on the purchase order, the **Visible to Supplier** checkbox must be selected.
Approval Flow	• Verify the approval flow includes all required parties. • Additional approvers may be added if necessary.
Shipping Details	• Verify shipping details.

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 (**Figure 119**).

Figure 119: Approval Flow Tab Tracks Requisition Approval Status



EDITING A SUBMITTED REQUISITION

Users with Edit permission can edit a requisition and re-submit the revised version.

If you have this permission, you will see an **Edit** button next to the **Approve** and **Deny** buttons. Users who do not have this role will not see the button.

Click **Edit** to open the requisition in edit mode in order to make changes to editable fields such as **Quantity** or **Billing Address**. When you are finished, click **Save** to resubmit the requisition.

Editing the requisition causes the approval flow to reset according to the new values on the requisition. All required approvals will be re-applied unless the editing approver has a special role that prevents this. In that event, the editing approver will be given the opportunity to re-circulate the requisition to previous approvers.

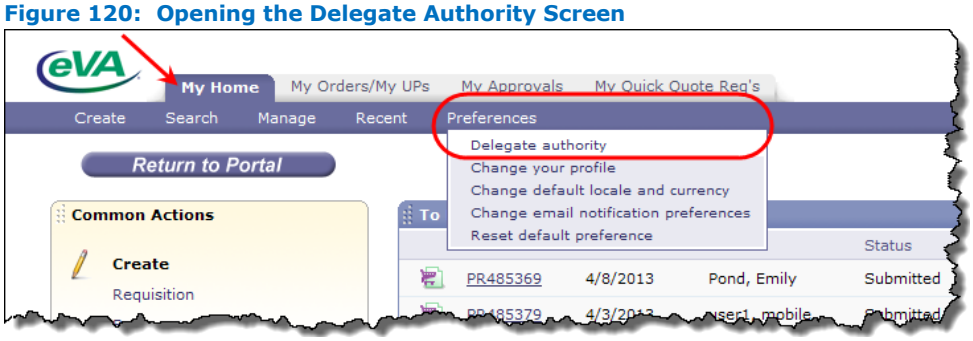
DELEGATING APPROVAL AUTHORITY

If you are going to be unable to access eVA long enough to cause delays for potential purchases (if, for example, you are going on vacation), you can temporarily delegate your approval authority to another user for a specified period of time. You can revoke the delegated authority at any time.

STEP 1: DELEGATE

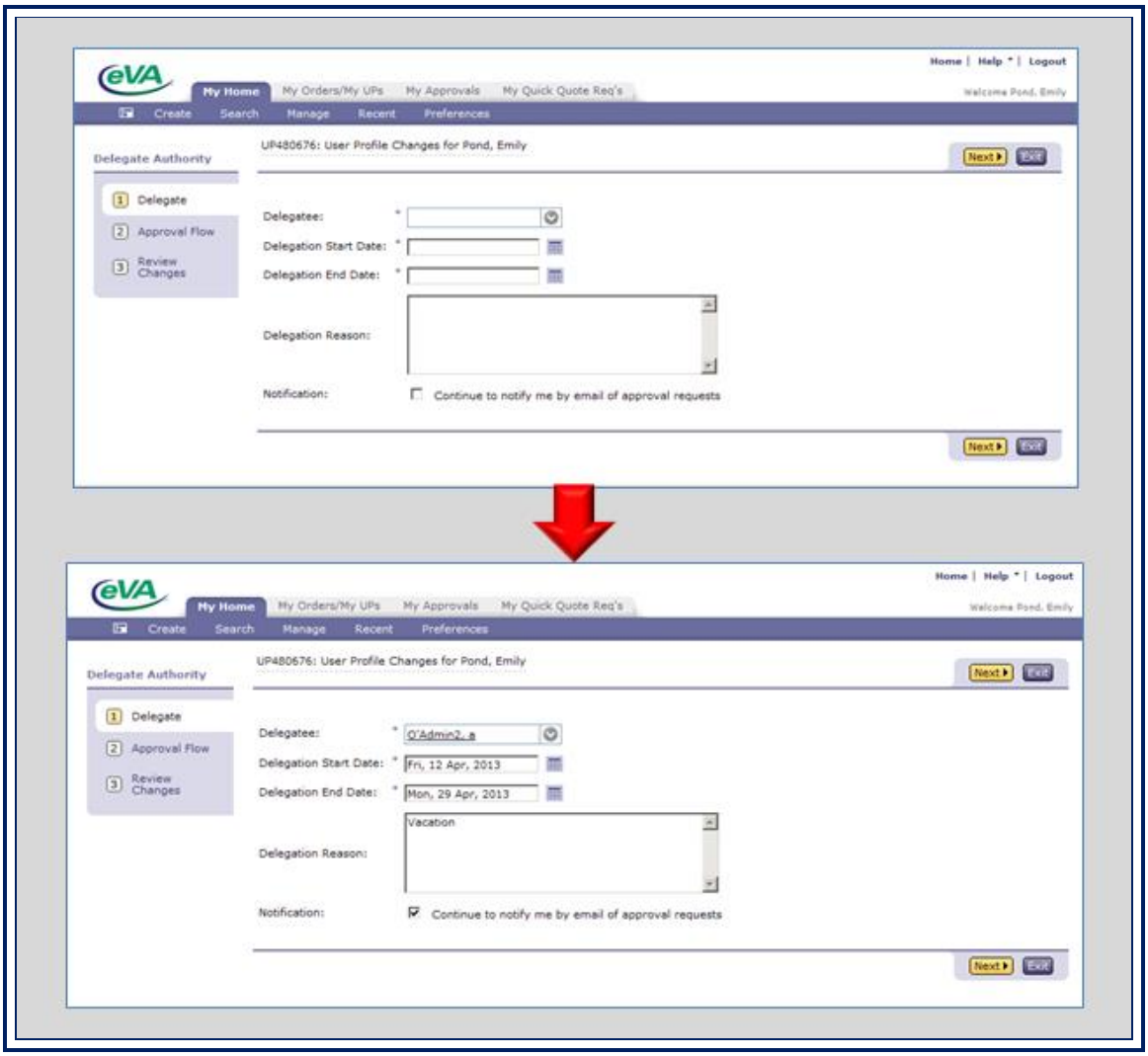
To delegate approval authority, go to the **My Home** tab on the **DASHBOARD** and select *Delegate authority* from the **Preferences** menu.

Figure 120: Opening the Delegate Authority Screen



Insert the required information on the Delegate Authority screen (**Figure 121**). If the name of the person to whom you want to delegate authority does not appear in the **Delegatee:** drop-down list, select **Search for more…** .

Figure 121: Completing Delegation of Authority



Use the calendar icons to set the **Delegation Start Date** and the **Delegation End Date**. The Delegation Start Date is the first date your delegate can act as your approver; the Delegation End Date is the date your delegation of authority expires. The delegation begins and ends at midnight on the specified dates, except when the delegation start date is the current date. In that case, the delegation is effective immediately.

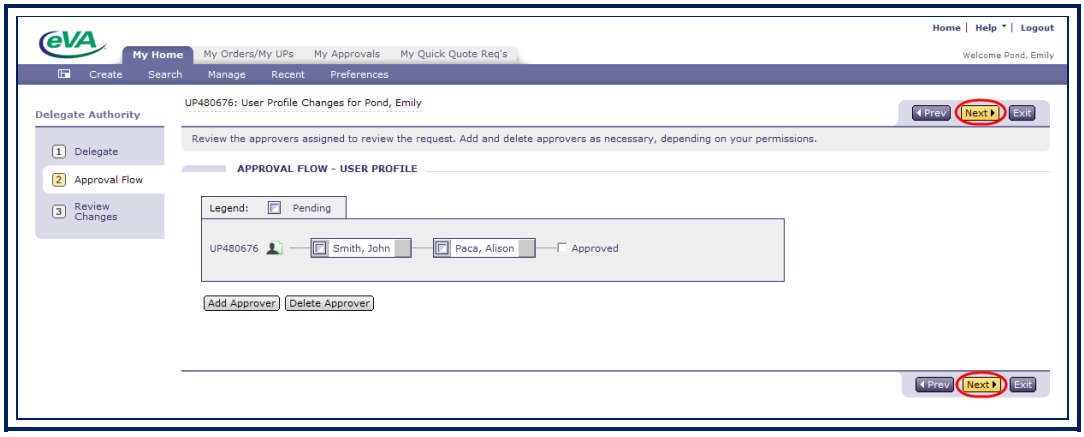
You can enter a **Delegation Reason**, but this is not required. If you want to continue to receive approval notification emails while you are away, click the **Notification** checkbox; you and your delegate will both receive the notifications. When you are finished, click **Next**.

When you submit a Delegation of Approval, a User Profile (UP) document will appear in the My Documents list on your eVA dashboard.

STEP 2: APPROVAL FLOW

The default approval flow assigned to your user profile is displayed on this screen (**Figure** 122). Click **Next** when you are ready to proceed to the next step.

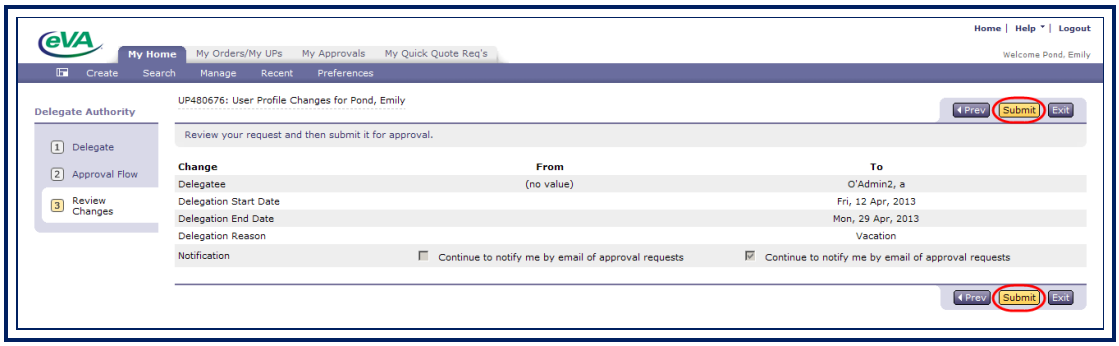
Figure 122: Approval Flow Screen



STEP 3: REVIEW CHANGES

The **REVIEW CHANGES** screen provides an opportunity to take a second look before you submit your changes (**Figure 123**).

Figure 123: Review Delegation of Authority Changes

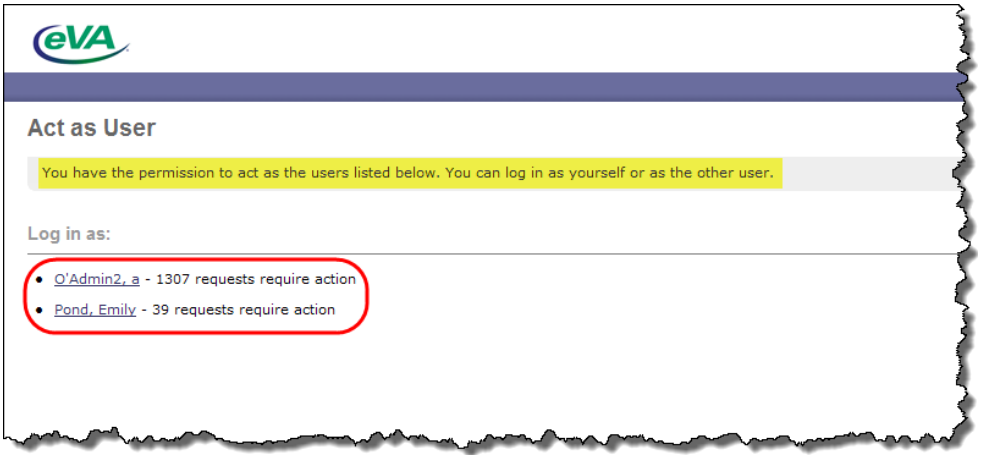


When you are satisfied that your changes are correct, click **Submit** to activate your delegation of authority.

"ACT AS USER" SCREEN

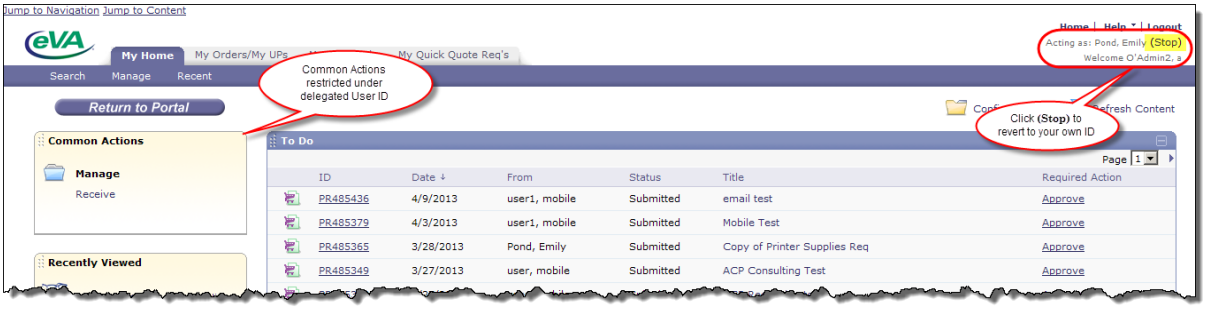
During the delegation period, your delegated approver will see the **ACT AS USER** screen (**Figure 124**) when accessing the eMall (Shop Now) link. This screen prompts the delegate to select the User ID to implement for that session. The delegate must choose whether to act under his own name for regular eMall functions, or to act as an approver on your behalf (or on behalf of another delegator, if applicable).

Figure 124: Act as User Screen Prompts ID Selection



When a user is acting under a delegation of authority, access to eMall functions is limited (**Figure 125**).

Figure 125: Restricted Access Under Delegation of Authority



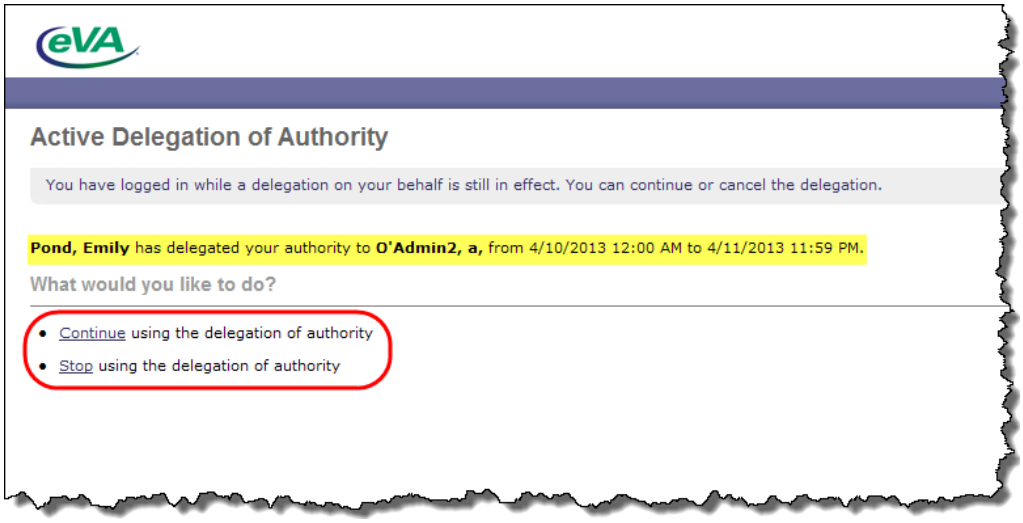
A delegate can exit from the delegated User ID and resume using their own User ID without logging off and then logging back on. Instead, the delegate can click the (Stop) link in the upper right corner of the screen; eVA will restore full access under the delegate's personal User ID.

> ***NOTE:*** *When you are acting as an approver under another user's ID, you will not be able to create transactions under that User ID.*

ACTIVE DELEGATION OF AUTHORITY

If you log on before your delegation of approval authority expires, you will be notified via the **ACTIVE DELEGATION OF AUTHORITY** screen (**Figure 126**). You must choose whether to Continue using the delegation of authority or to Stop using the delegation of authority by clicking the appropriate link. Your choice is effective immediately.

Figure 126: Reminder of an Active Delegation of Authority



11. WORKING WITH ORDERS

Orders are created from the requisition after the final approval. Each order is assigned a number and a prefix. The prefix helps to identify the order type, as explained earlier. To review that information, see Section 2, Orders.

FINDING AN ORDER

There are several reasons you might need to access a particular order. For example, some orders cannot be delivered electronically to the supplier; these must be printed and mailed. Or you might want to find a particular order to check for updates from the supplier or to create a Change Order.

FIND AN ORDER FROM THE REQUISITION

If you want to

- Review the orders generated by a particular requisition,
- Print and fax an order, or
- Make changes to an order (some users have permission to change the order directly),

the best strategy is to begin with the requisition. Find the requisition in the **My Documents** list on the **My Home** tab of your dashboard and open it by clicking the requisition number (**ID**) or **Title** (**Figure 127**).

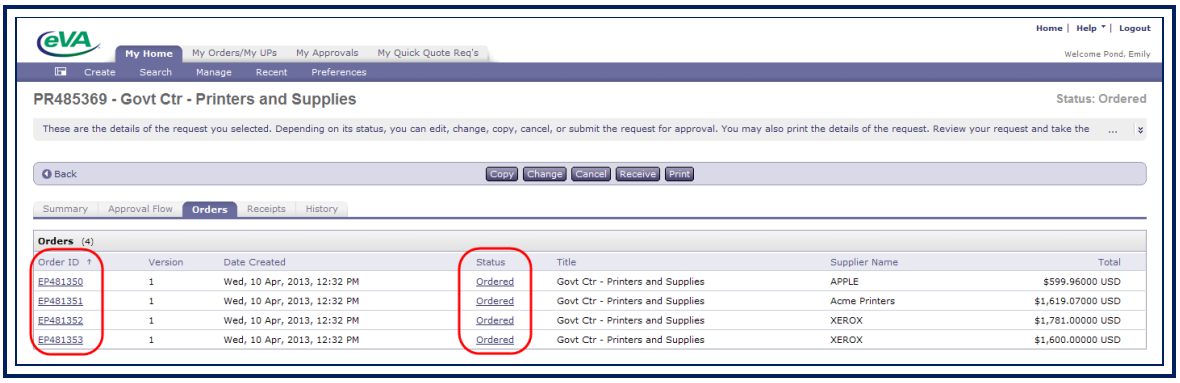
Figure 127: Opening a Requisition to Access Associated Orders

Select the **Orders** tab (**Figure 128**) in the open requisition to see a list of orders that have been generated.

Figure 128: Finding Orders for a Requisition

In the example shown in **Figure 129**, the requisition created four separate orders. Click the **Order ID** of the order you want to review to open the **ORDER** screen.

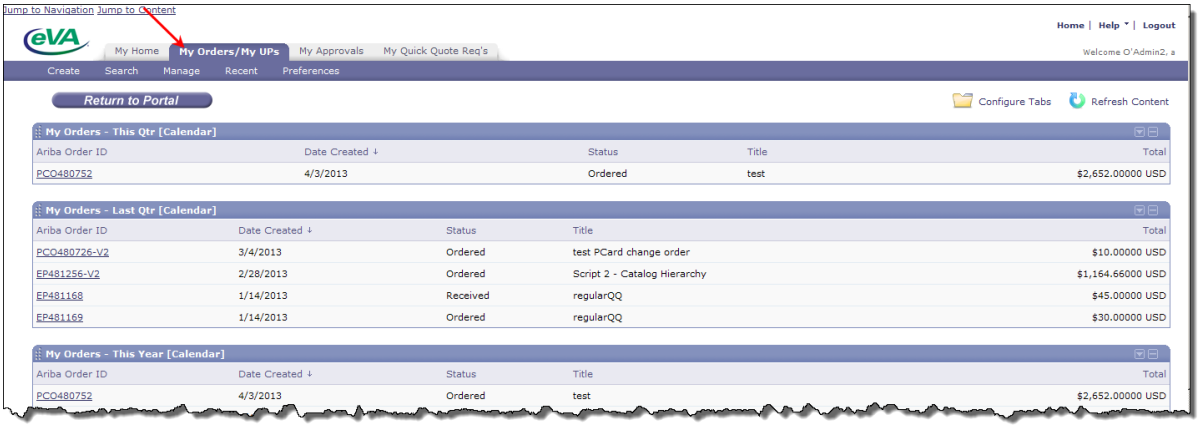
Figure 129: List Displayed on Orders Tab



FIND AN ORDER ON THE MY ORDERS/UPS TAB

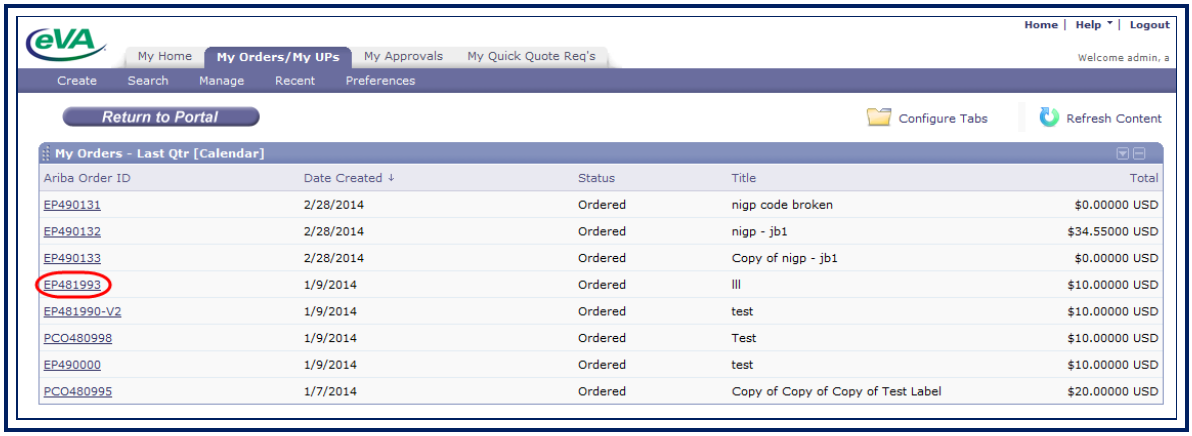
If you know the order ID, you do not need to start with the requisition. Instead, you can go to your **DASHBOARD**, select the **My Orders/UPs** tab, and look in the **My Orders** list panes (**Figure 130**).

Figure 130: Access Orders Directly from the My Orders Tab



Find the order you need and access the **ORDER** screen by clicking the **Ariba Order ID** (**Figure** 131).

Figure 131: Order Accessed from Dashboard

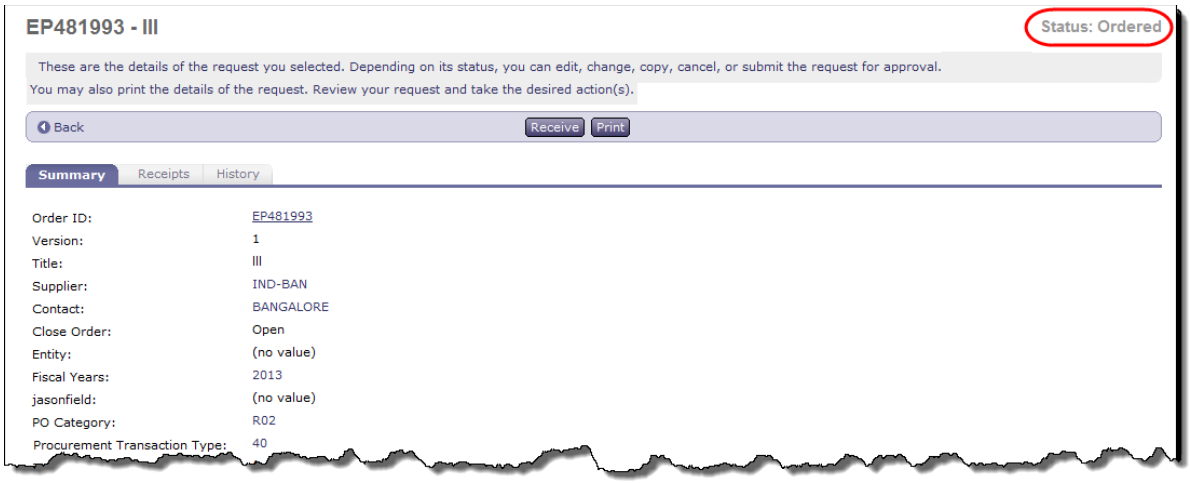


ORDER SCREEN

The **ORDER** screen displays the following four tabs:

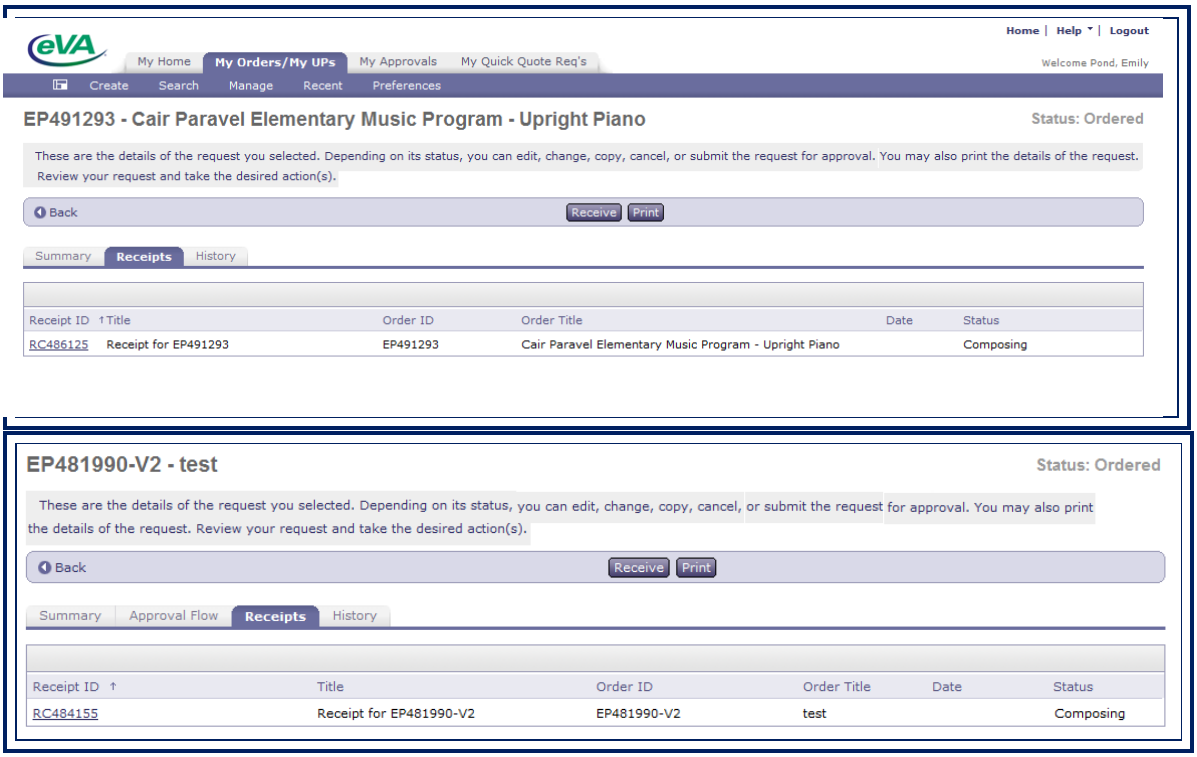
- **Summary:** The **Summary** tab is the order-level counterpart of the Requisition Summary. It shows a detailed summary of the order, including line items and accounting information.

Figure 132: Order Screen Summary Tab



- **Receipts:** The **Receipts** tab will display receiving information when it becomes available. For an in-depth look at the **Receipts** tab, see *eMall User Guide Volume 2*, which focuses on the Receiving process.

Figure 133: Order Screen Receipts Tab



- **History:** The **History** tab displays information at the order level much like that provided at the requisition level on the requisition **History** tab. Successful submission and processing, changes to line items, etcetera, are shown on the order History tab (**Figure 134**Error! Reference source not found.).

Figure 134: Order with Tracked History

All tabs of the **ORDER** screen show the status of the order in the upper right corner.

ORDER STATUS

When orders are sent to suppliers electronically by the Ariba Network, their status is updated on the requisition **Orders** tab and the **My Orders/My UPs** tab on the **DASHBOARD**, as well as on the order itself. The status will be either *Ordering* or *Ordered*, depending on where the order is in the process. Note that an order should remain in *Ordering* status for only a short time. If *Ordering* status persists for longer than 30 minutes, contact eVA Customer Care for help.

Orders that are generated to a print vendor must be printed and mailed (or faxed) after the requisition moves to ordered status.

Most of the time, the order status will match the requisition status, but this is not always the case, especially when there are multiple orders under one requisition.

PRINTING AN ORDER

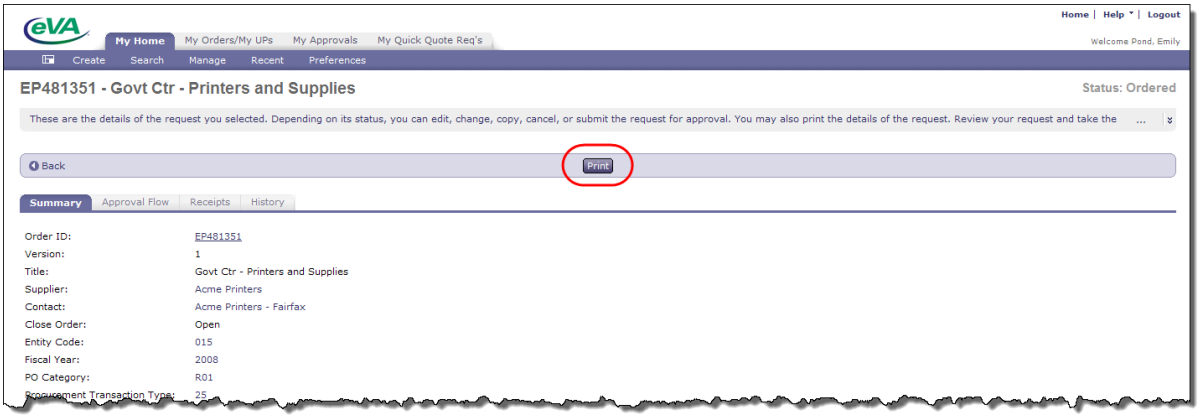
In practice, you would always know which orders must be printed and mailed or faxed to the supplier because the requester is the last person in the approval workflow, but if you are not certain, click the **Ordered** link (in the **Status** column) for the order in question. If you see a screen similar to the one shown in **Figure 135**, you must print your order and mail or fax it to the supplier.

Figure 135: Not Ordered Through Ariba Network Message

Return to the **Order** tab by clicking **Back**, then click the Order ID link of the order that you want to print.

When the order you want to print opens, click **Print** and follow the instructions given for printing a requisition.

Figure 136: Printing an Order



CANCELING ORDERS

You can cancel a requisition that has been fully approved (*Ordered* status) and for which all associated orders have been sent to suppliers (**Figure 137**). The **Cancel** function can notify the supplier of the change *if* that supplier has agreed to receive order cancellations through the Ariba Network. If the supplier cannot accept electronically transmitted orders or cancelations, you must the print the canceled order and mail or fax it to the supplier

Figure 137: Canceling a Requisition in *Ordered* Status

When a requisition has entered *Receiving* or *Received* status, it cannot be canceled. (However, you can effect the same result by processing a return. For more information, see *eMall User Guide Volume 2, Returning Items*.)

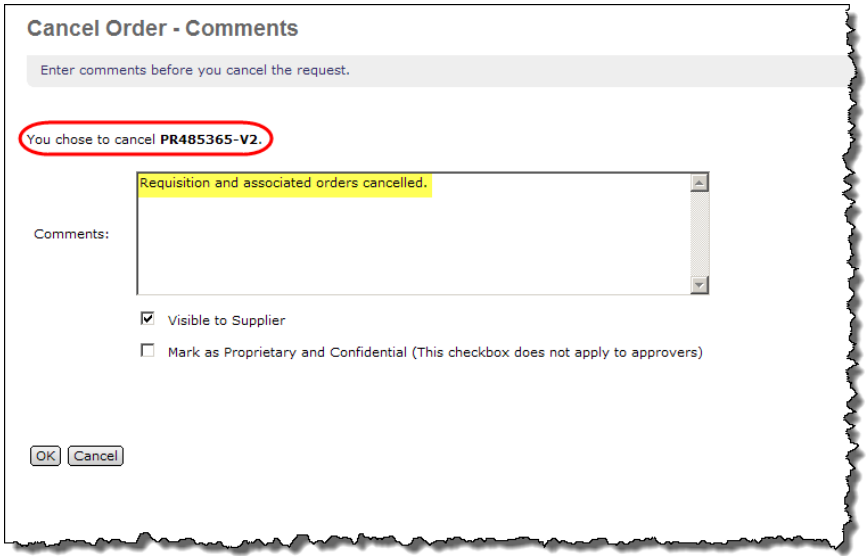
Be aware that when you cancel a requisition, *all* of the orders generated by that requisition are also canceled.

> ***WARNING!*** *Be careful not to cancel an entire requisition if at least one of the orders on the requisition should not be cancelled. Instead, do a change to the requisition to remove the necessary line(s).*

When you click **Cancel**, the system will:

- Display a **CANCEL ORDER – COMMENTS** screen, where you can enter a comment explaining why you are choosing to cancel this order.
- Remove all the approvals.
- Send a notification message to the buyer (when different from the preparer) stating that the request is canceled.
- Send a cancellation order to the appropriate supplier for each canceled order.
- Change the requisition status to *Canceled.*

Figure 138: Cancel Order – Comments Screen



12. MODIFYING REQUISITIONS

Requisitions can be changed in a number of different ways depending on the status of the requisition and what you are trying to accomplish. eVA tracks these changes and displays the information on the requisition's **History** tab. See the Requisition History Tab section of this guide for details.

Table 16 summarizes the options available under each requisition status.

Table 16: Change Actions by Status

Requisition Status	Available Actions
Composing	Submit / Copy / Delete
Submitted	Withdraw / Copy
Denied	Withdraw / Copy
Ordered	Cancel / Copy / Change
Receiving	Close Order / Copy / Change
Received	Copy NOTE: If a change is needed to a requisition in this status, it may be necessary to back out prior receiving. Refer to the eMall Guide, Vol 2.
Cancelled	None

Changes you can make to requisitions include:

- Creating a Change Order for a requisition in *Ordered* or *Receiving* status.
- Deleting a requisition you no longer need (*Composing* status only).
- Editing a requisition to insert additional lines and modify existing lines.
- Withdrawing a requisition that is in *Submitted* or *Denied* status.
- Canceling a requisition that is in *Ordered** status.
- Copying a requisition to use as a template.

*NOTE: A requisition in *Receiving* or *Received* status can be canceled only after all prior receiving is backed out. Refer to *eMall Guide, Volume 2*.

CHANGES THAT CAN BE MADE

Nearly everything on a requisition can be changed. See the tables below for restrictions and special situations.

HEADER CHANGES

The requisition header is composed of the data you fill in on the **TITLE** screen when you create the new requisition. As shown in **Table 17**, there are very few restrictions on changes to the header fields.

Table 17: Changing Header Fields

Header Field	Action	Comment
Use PCard	Change	• Results in a new **DO** or **EP** order, or a new PCO, depending on whether or not the box is checked. • The original order number is *not* versioned; it is canceled. • Be sure to enter a requisition comment warning the supplier NOT to duplicate the order, if applicable. (Note that the supplier does not see header information on their order.)
Other header field	Change	• No restrictions.

LINE ITEM CHANGES

Most restrictions on Line Item changes concern items that have been completely or partially received, or items added from PunchOut catalogs. Refer to **Table 18** for details.

Table 18: Changing Line Item Fields

Commodity Lines	Action	Comment
New Line Items	Add	• No restrictions.
Existing Line Items	Delete	• Cannot delete a line that has already been received. • Cannot make the total order amount or quantity below zero. • Changes to this field for items ordered from a PunchOut catalog must be made at the supplier's website, as directed by the system.
Quantity	Change	• Cannot decrease quantity below zero. • Cannot decrease below quantity already received without first backing out prior receiving. • Cannot make total order amount or quantity below zero. • For items selected from a PunchOut catalog, click on the underlined description to return to the PunchOut site to make the change..
Price	Change	• Non-catalog items only.
Unit of Measure	Change	• Non-catalog items only.
Description	Change	• Non-catalog items only.
Commodity Code	Change	• Non-catalog items only.
Other line item fields	Change	• Some PunchOut item fields might not be eligible for mass editing. No other restrictions.

MODIFYING REQUISITIONS

Table 19 describes the actions you can take to modify a requisition, depending on its status.

Table 19: Modifying eMall Requisitions

Requisition Status	Change Button Available?	Action to Modify Requisition
Composing	No	A requisition in *Composing* status has not been approved or sent to any suppliers. It can be modified using the **Edit** function without the need to generate a change order.
Submitted	No	A requisition in *Submitted* status must be withdrawn to return it to *Composing* status; then you can edit it.
Denied	No	A requisition in *Denied* status can be opened , edited, and resubmitted.
Ordered	Yes	A requisition in *Ordered* status can be modified by clicking the **Change** button after clicking the PR ID number.
Receiving	Yes	A requisition in *Receiving* status can be modified by clicking the **Change** button after clicking the PR ID number. To change a quantity below what has already been received, prior receiving must be backed out.
Received	No	A requisition in *Received* status is closed. The order(s) must be reopened to return the requisition to *Receiving* status before a Change Order can be generated. Depending on the type of change required, you might need to back out prior receiving.

MODIFYING IMPORTED REQUISITIONS

Some kinds of imported requisitions can be modified in the eMall, while others must be changed in their original environment and then re-imported. **Table 20** shows the various kinds of imported requisitions and the steps to be taken to change kind.

Table 20: How to Modify Imported Requisitions

Imported From	Special Condition	Change Button Available?	Comment
Interface (IRQ:)	Approved in eMall	Yes	Create a Change Order, or make changes in ERP and re-import.
	Approvals bypassed	No	Make changes in ERP and re-import.
Quick Quote (QQ:)	N/A	Yes	Make changes in the eMall.
eProcurement (E2E)	N/A	No	Lines cannot be edited.

EDITING A REQUISITION

Unless you are the approver, a requisition must be in *Composing* status in order to be edited. When editing a requisition, you can access all of the same functionality that is available on a new requisition.

Open the requisition and click **Edit** to:

- **Add line items**.
- **Modify line items:** If the item was selected from a PunchOut catalog, you must return to that supplier's catalog to edit the item.
- **Perform Mass Edits:** Edit the same information for multiple items at one time.

Figure 139: Editing Requisition in *Composing* Status

After you make changes, review the requisition and click **Submit** to begin the approval process.

> ***IMPORTANT!*** *Only changes that impact the vendor, such as added line items or price changes, will generate a versioned* ***order****. If changes are made that do not impact the vendor, such as accounting code changes, the* ***requisition*** *will be versioned, but no new order will be generated to the supplier.*

COPYING A REQUISITION

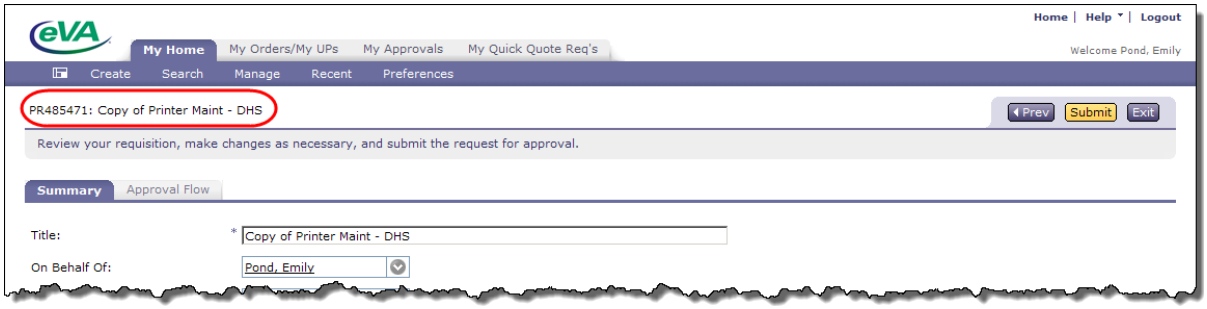
You can create a copy of an existing requisition to use as a template, regardless of the requisition status. It is recommended, however, that you do not copy a canceled requisition because cancelled line items cannot be copied. Items originally ordered from a PunchOut catalog also cannot be copied.

To copy a purchase requisition, find the requisition you want to copy on the **STATUS** screen. Select the checkbox next to that requisition and click **Copy**. You can also copy a requisition by opening an existing requisition and clicking the **Copy** button, as shown in **Figure 140**.

Figure 140: Copying Requisition to Use as Template

eVA will create a duplicate requisition, assign a new Requisition Number to it, and present the duplicate in Edit mode (**Figure 141**).

Figure 141: Duplicate Requisition in Edit Mode



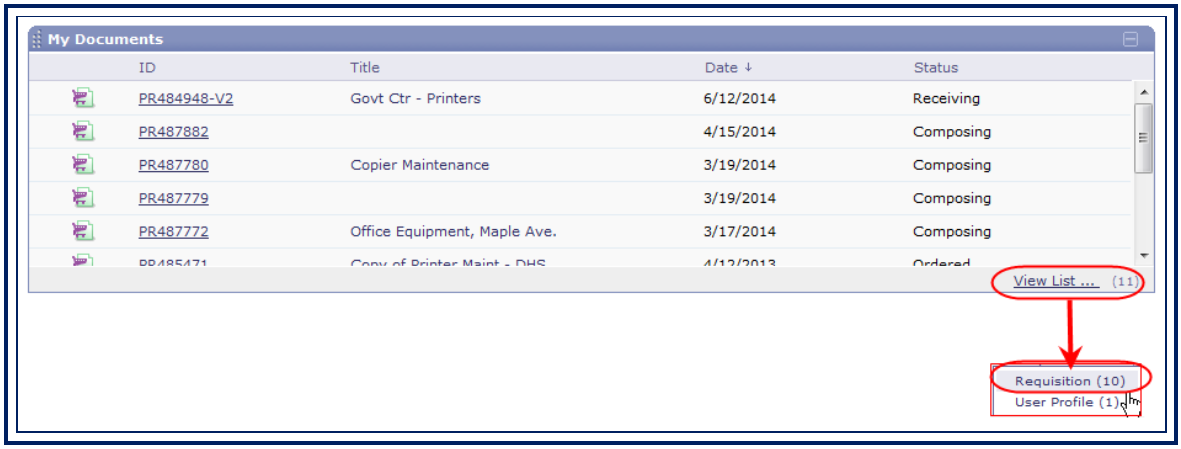
Make the desired changes and click **Submit** to begin the approval process.

DELETING A REQUISITION

Only requisitions in *Composing* status may be deleted. Requisitions that have moved beyond *Composing* status must either be returned to *Composing* status to be deleted (provided they have not moved to *Ordered* status), or they must be canceled.

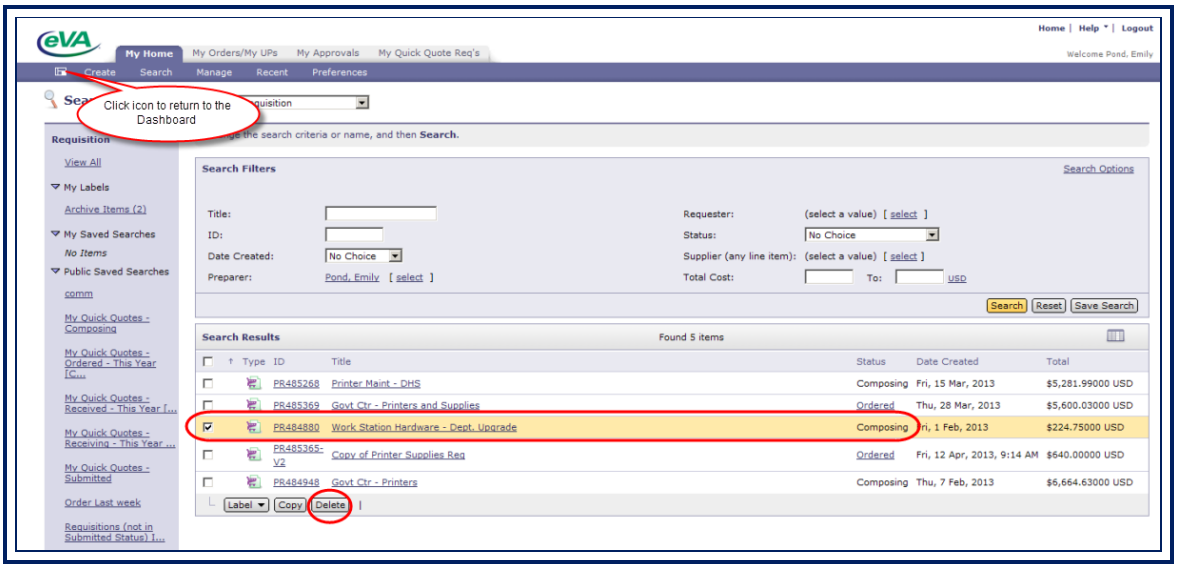
Click View List … on your **My Documents** list and select *Requisitions* to open the list in Search/Edit mode (**Figure 142**).

Figure 142: Accessing Editable List



Select requisitions to delete by clicking their checkboxes. Make sure they are all in *Composing* status, and then click **Delete** (**Figure 143**).

Figure 143: Deleting Requisition in Composing Status



When you click **Delete**, the requisition will disappear from the document list and will be deleted from eVA. Composing requisitions that have been denied by an ERP during the integration process might not delete.

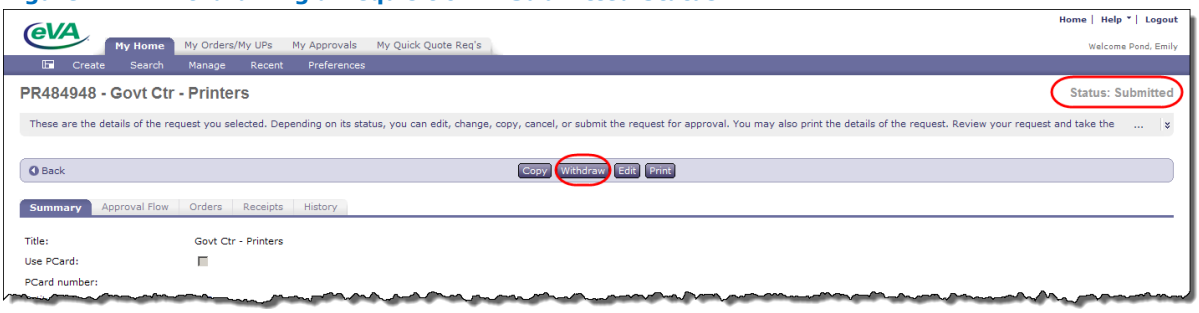
> ***IMPORTANT!*** *Be cautious when using Delete – a Delete action is permanent and* ***cannot*** *be reversed.*

WITHDRAWING A REQUISITION

You can withdraw any requisition that is in *Submitted* or *Denied* status, as these requisitions have not been fully approved.

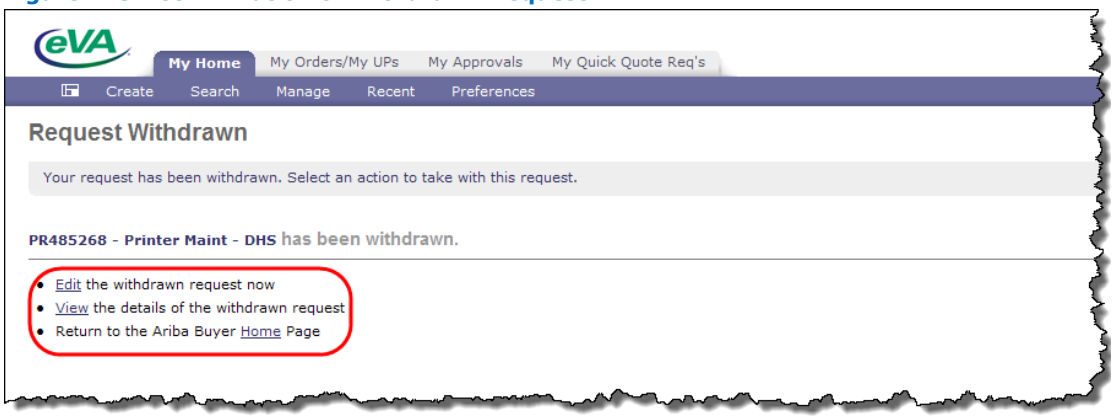
Open the requisition and click **Withdraw** (**Figure 144**).

Figure 144: Withdrawing a Requisition in *Submitted* Status



The **REQUEST WITHDRAWN** screen confirms your action and provides links to continue with your work (**Figure 145**).

Figure 145: Confirmation of Withdrawn Request



When you withdraw a requisition, its status reverts to *Composing*. In *Composing* status, the requisition is treated like a new request; you can copy it, make changes and re-submit it, or delete it.

> ***NOTE:*** *When a requisition has entered Ordered status, it cannot be withdrawn because the order is in the hands of the supplier, but you can cancel a requisition in Ordered status.*

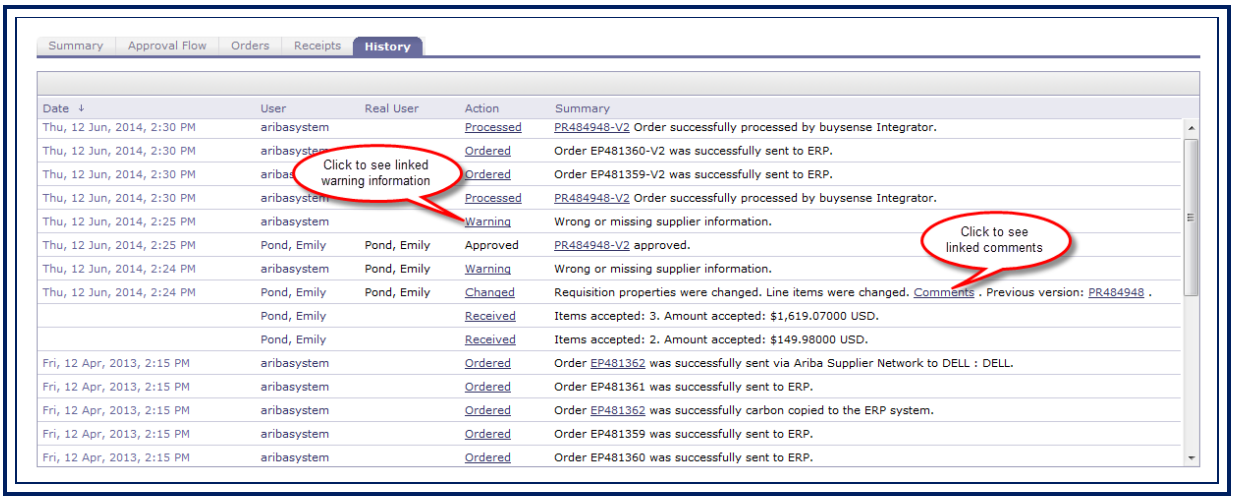
REQUISITION HISTORY TAB

eVA tracks each requisition from submission through approval, ordering, and receiving, and displays a log-style summary of that information on the **History** tab (**Figure 146**Error! Reference source not found.). You will see a list of approvals, orders created, any new versions created through change orders, etcetera. If the requisition was copied or imported, it will be listed here, as will Receiving information.

The **History** tab contains only basic information, but details are easily accessed using the various links that are provided.

- Requisition numbers in the **Summary** column link to the requisitions' **Summary** tabs, where you can review line items and other details.
- Comments added by the preparer or by approvers are always linked.
- Warnings and error messages generated while the requisition was being prepared are also accessible using links from the **History** tab.

Figure 146: Example of Requisition History Tab



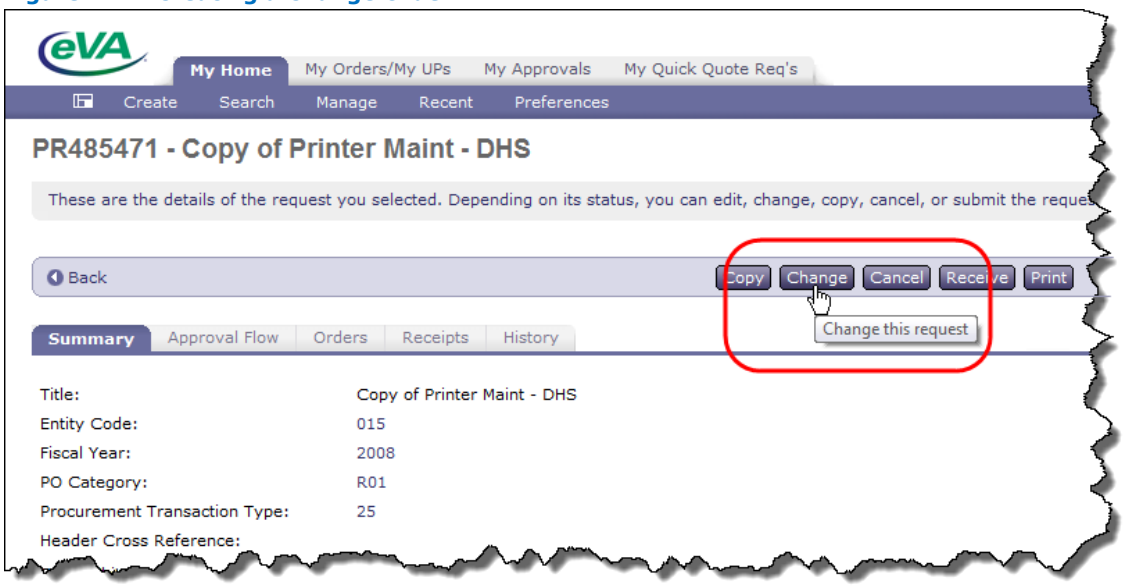
Note that timestamps do not appear for receiving on the **History** tab; however, you can see receiving dates on the **Receipts** tab.

13. CHANGE ORDERS

You might find that you have to change an order after it has been delivered to a supplier, while it is in *Ordered* or *Receiving* status. In these cases, you must create a Change Order.

To create a change order in eVA, open the current version of the requisition that generated the order you want to alter and click the **Change** button (**Figure 147**).

Figure 147: Creating a Change Order



Note that only requisitions that are in *Ordered* or *Receiving* status will display the **Change** button. If the requisition is not in *Ordered* or *Receiving* status, you must take steps to move it into an appropriate status before you can create a Change Order.

For example, an order in *Received* status is closed; you cannot alter a closed order. To make changes, you must reopen the order so that it will revert to *Receiving* status; then you can access the **Change** button on the requisition to create a Change Order. Refer to the *eMall_User Guide, Volume 2* for instructions.

> ***NOTE:*** *Only the preparer of the initial requisition can create the change order unless an individual has been granted special permission.*

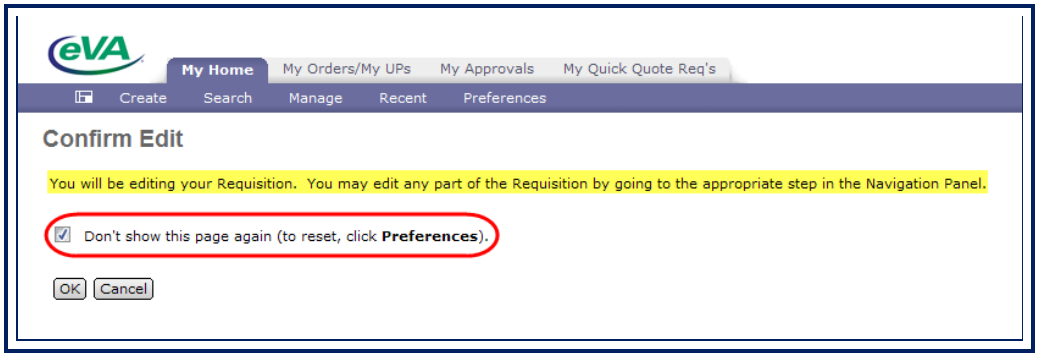
COMPLETING A CHANGE ORDER

Follow these steps to complete and submit a Change Order.

1. As noted above, begin by opening the requisition for which you are creating the change order, and then clicking the **Change** button, as shown in **Figure 147**Error! Reference source not found.. (If the **Change** button is not visible, confirm that the requisition is in *Ordered* or *Receiving* status.)

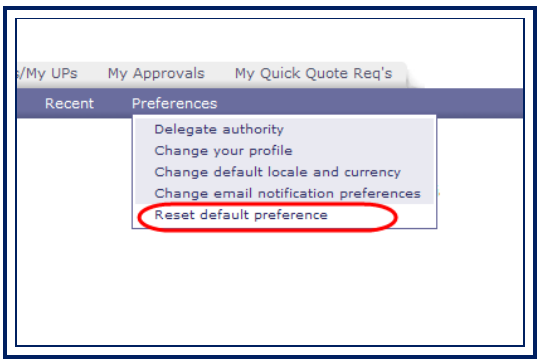
2. The **CONFIRM EDIT** screen opens (**Figure 148**). This screen will be presented each time you choose to change or edit a requisition. If you prefer to not see the confirmation screen, click the check box next to **Don't show this page again** before you click **OK** to proceed.

Figure 148: Click the Checkbox to Disable the Confirm Edit Screen



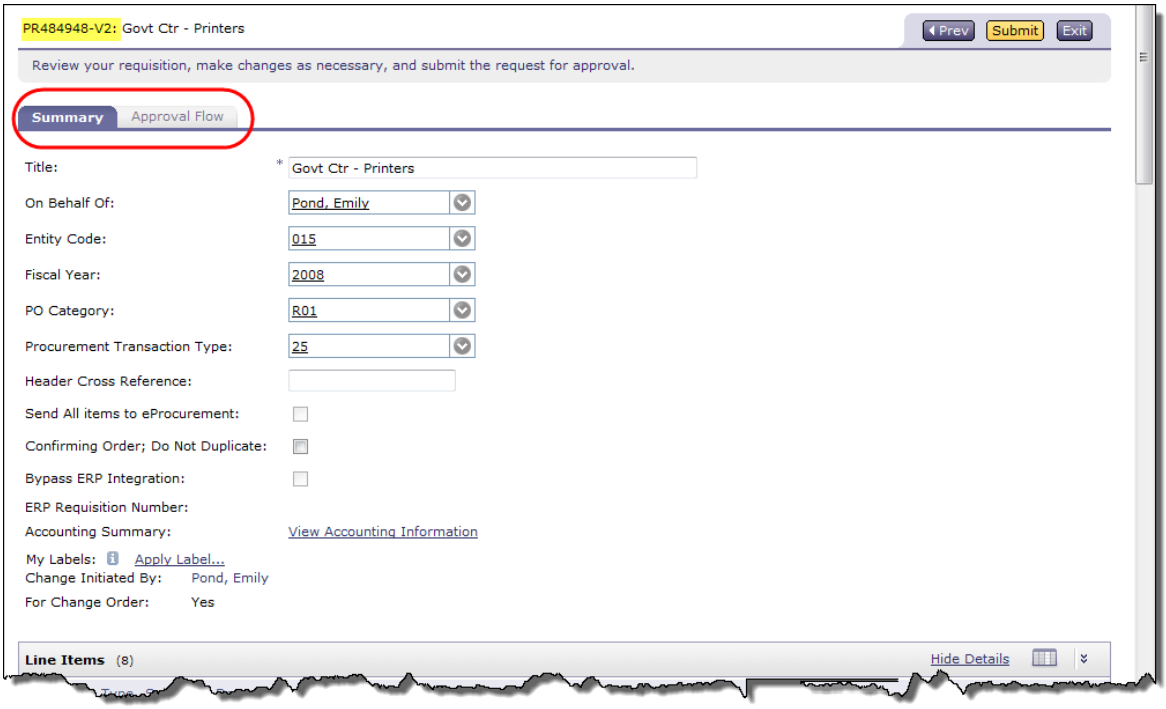
As noted on the **CONFIRM EDIT** screen, if you change your mind and want to re-enable the reminder, go to the **Preferences** menu and select *Reset default preference* (**Figure 149**).

Figure 149: Re-enabling the Edit Confirmation Prompt



3. The **Requisition Summary** tab will open in **Edit** mode. Notice the differences between the **Change Order Summary** tab and the regular **Requisition Summary** tab (**Figure 150**). The **Requisition Number** will be the same, but will have a version number appended to it; also, there will be only two tabs, **Summary** and **Approval Flow**, instead of the four tabs you would normally see.

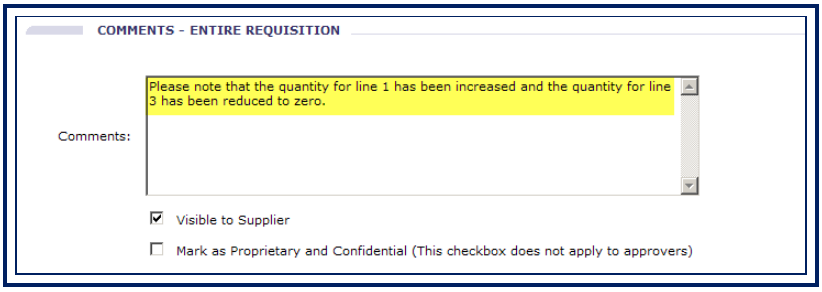
Figure 150: Change Order Summary Tab



Make your changes on the new version of the requisition.

4. When you have finished making changes, add a comment that clearly identifies the changes to the order and check **Visible to Supplier** (**Figure 151**).

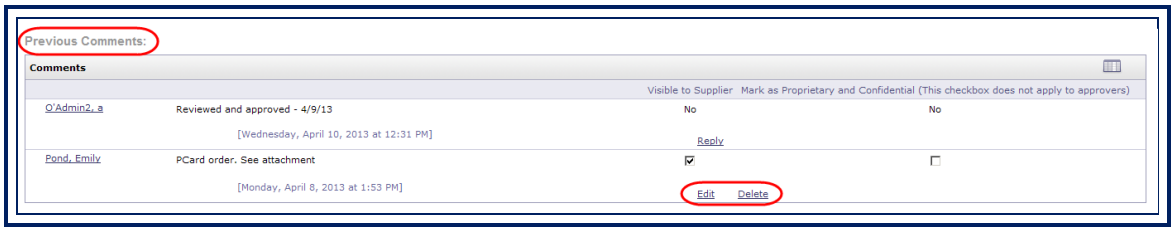
Figure 151: Adding an Explanation for the Supplier



When you know that the requisition will be divided into multiple orders, it may be more appropriate to use Line Item comments. Follow the procedure outlined under **Comments – by Line Item** in this manual.

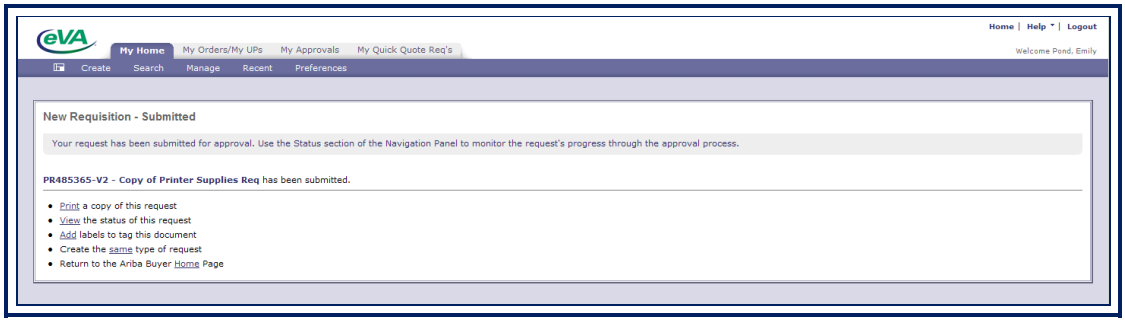
5. Before submitting the Change Order, confirm that all attachments and comments from the original order still apply. New comments and attachments are listed before earlier ones. Prior comments and attachments can be deleted or modified by clicking **Edit** or **Delete (Figure 152)**.

Figure 152: Review Prior Comments and Attachments



6. Click **Submit** to send the new version of the requisition through the **Approval Flow**. The confirmation message is the same as for a new requisition (**Figure 153**).

Figure 153: Confirmation of Submission



After a Change Order passes through the Approval Flow and the requisition moves to *Ordered* status, new versions of the relevant orders are created and sent to the suppliers, following the same rules and procedures as the original orders. The previous version of the request will no longer be visible on your active documents lists such as **My Documents**. It will be replaced by the newer version of the requisition.

SEQUENTIAL CHANGE ORDERS

You can make repeated changes to orders. Each new requisition and order will receive the next version number in sequence.

Table 21 below illustrates how sequential changes in requisition PR123 create new order version numbers.

Table 21: Versioning a Requisition and Associated Orders

Requisition Change	Original PR	Original Orders	Resulting PR	Resulting Orders
Any Header Field (except PCard)	PR123	DO456 DO457	PR123-V2	No new versioned order
Use PCard	PR123	DO456 DO457	PR123-V2	DO456 canceled PCO788 created DO457 canceled PCO789 created
Any Line Field that Impacts Vendor	PR123	DO456	PR123-V2	DO456-V2

IMPORTANT NOTES REGARDING CHANGE ORDER PROCESSING

Some of the information in this section has been mentioned briefly in the preceding discussion of Change Orders, but it bears further discussion; communicating clearly with suppliers is critical.

DISAPPEARING CHANGE BUTTON

There are two scenarios in which the **Change** button becomes unavailable. The first is the most common and is easily remedied. The second scenario is very specific and much less common, but can also be remedied.

Scenario 1:

The most likely beginning of this scenario occurs when you are reviewing an order and determine that you need to make some changes. You open the requisition, only to find that the action buttons are missing.

In this case, think about the path you followed to reach the requisition. If you accessed the requisition through a line item on an order, the action buttons will not be available. To see the action buttons on the requisition, back out of the screen; conduct a search for the PR number, and then open it.

Scenario 2:

Suppose you want to create a Change Order for a requisition that is in *Receiving* status. You open the requisition and click the **Change** button as described in this manual, but before you can make any changes, your manager asks to speak with you for a few minutes. One thing leads to another, and by the time you return to your Change Order, you find that your session timed out and you have been logged off of the eMall.

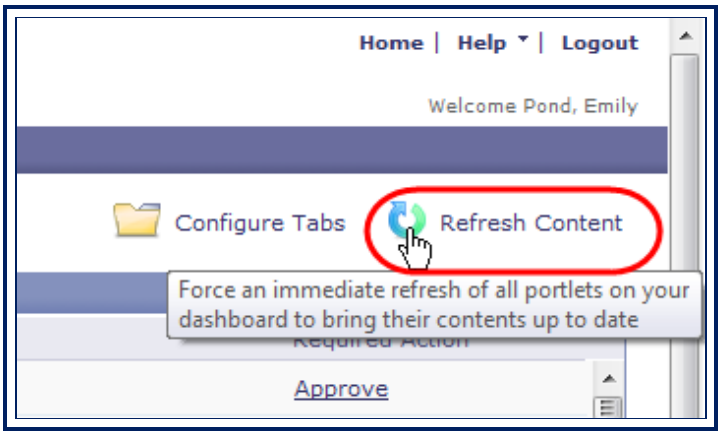
When you log in again, you find the requisition still in *Receiving* status and reopen it, only to find that the **Change** button is no longer available. Not only the **Change** button—*all* of the action buttons are gone and all you see is a **Back** arrow at the far left of the page (**Figure 154**). What happened?

Figure 154: Missing Action Buttons

The most likely cause in this scenario is that the requisition moved into a temporary *Composing* status to enable you to make changes when you created the Change Order. When your work session times out due to lack of activity, the *Composing* status can sometimes persist behind the scenes, while a different status is indicated on your **DASHBOARD**.

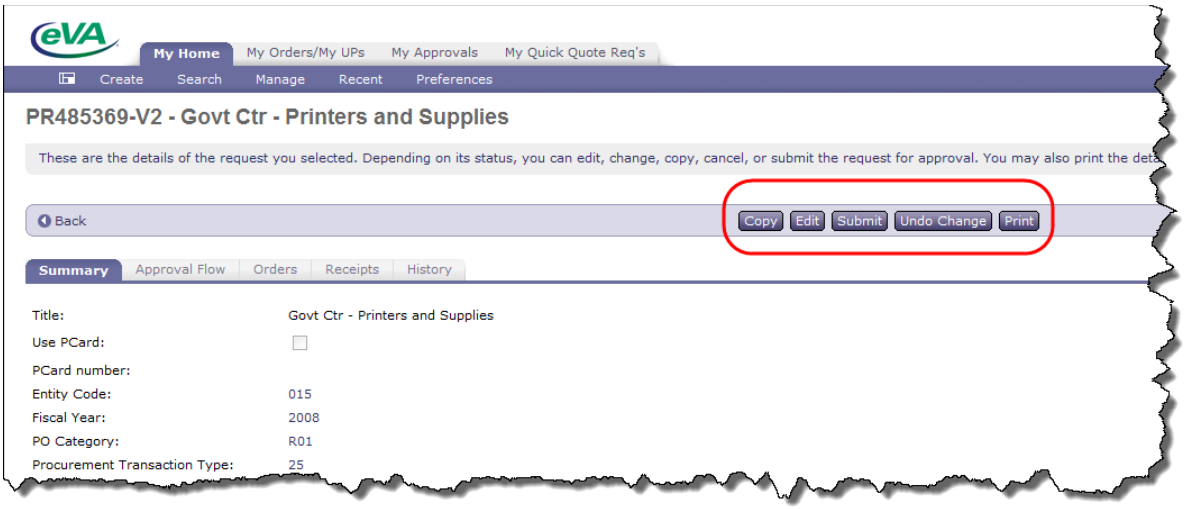
To remedy this situation, click the **Back** arrow or the **Dashboard** icon (under the eVA logo) to return to the **MY HOME** screen. Then click the **Refresh Content** icon to update the information displayed on the **DASHBOARD** (**Figure 155**).

Figure 155: Manually Refreshing the Home screen



Most often, the refresh action will move the requisition fully into *Composing* status. When you reopen it, you should find a full complement of buttons appropriate to a *Composing* requisition, plus an **Undo Change** button (**Figure 156**).

Figure 156: Undo Change Button Appears with Standard Action Buttons



To ensure that the Change Order is processed correctly and the supplier is properly notified, it is advisable to start over. Click the **Undo Change** button; the requisition will revert to its previous status (*Ordered* or *Receiving*), and the **Change** button will be activated.

If the refresh action does not succeed in moving the requisition to *Composing* status, contact eVA Customer Care at 1-866-289-7367 for help.

A CHANGE ORDER REPLACES THE ORIGINAL ORDER

When you process a change to your requisition, a new version of the order is sent to the supplier that contains all of the information necessary to act as a replacement for the previous version. If there is no change that impacts the supplier, no new order is created; however, the change will be noted on the PR **History** tab as *Action: Internal Change Order*.. Suppose, for example, that Lines *1*, *2*, and *5* have been changed on a six-line order. The Change Order that is sent to the supplier will show all six lines. *Lines 1*, *2*, and *5* will reflect the new values, while lines *3*, *4*, and *6* will retain their original values.

Busy suppliers might not realize anything has changed, even though the new order is marked *CHANGE ORDER* at the top. Help the suppliers (and yourself) by including a comment that contains a brief run-down of the changes.

FOLLOW UP WITH THE SUPPLIER

Even though the Change Order is clearly marked, and you have added comments to point out the changes at the requisition level and at the line item level, it is always wise to follow up with the supplier directly to ensure the Change Order is understood. This is especially true if you believe that the supplier might not be familiar with eVA Change Orders.

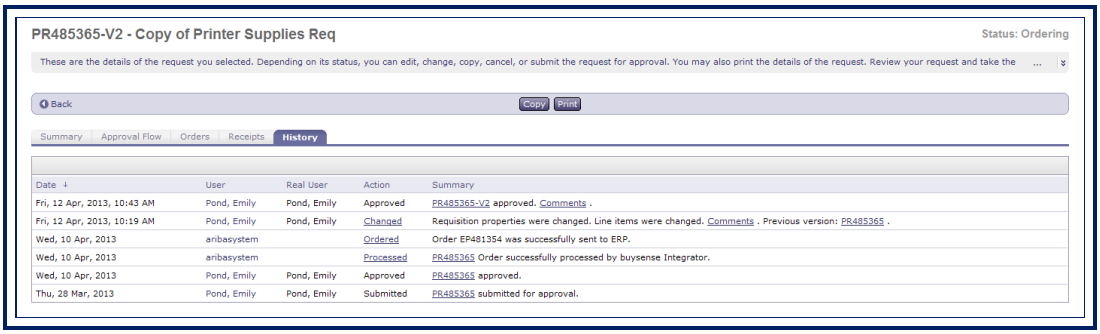
CHANGES MADE WHEN OTHER ACTION IS TAKEN

If a user begins receiving an order from a changed requisition that is in the process of being composed or approved, eVA will invalidate the changed requisition. This invalid requisition will not be permitted to complete required approvals and generate a change order. When this happens, the user must use the **Undo Change** button (**Figure 156**) to reverse the changes.

TRACKING CHANGE VERSIONS THROUGH ORDER HISTORY

A new version of a requisition is created when a preparer clicks **Change** on an existing requisition. As long as the change impacts the supplier, a new version of a purchase order is created when the submitted requisition is fully approved.. All change events are tracked on the Order **History** tab.

Figure 157: Change Order Tracked on the Requisition History Tab



As new versions of requisitions and orders are created, older versions become obsolete. In eVA, these older versions are considered *Inactive*. Inactive orders will not appear on operational reports or status lists, but you can still view the original order information on the Requisition **History** tab (**Figure 157**).

14. UNDERSTANDING INTEGRATION

Integration is optional functionality that allows the eMall to communicate requisition and order data to an external system, such as an ERP or financial system, in real time. By providing this data to the external system, an organization can choose to automate internal processes such as pre-encumbrances, budget checks, inventory checks, or encumbrances.

Integration is turned on at the Agency level, and then set up at the BSO level within the organization. It uses dollar thresholds established for each BSO to determine whether a requisition or purchase order will be sent to the external system. If the requisition or purchase order dollar amount is below the established dollar threshold, integration will not occur.

Within the eMall, the requisition approval flow functionality is used to accomplish the integration with an external system.

AVAILABLE INTEGRATION POINTS

There are two possible integration points.

- Requisition: The requisition is used as the integration point for such things as pre-encumbrances and budget checks.
- Purchase Order: The purchase order is the integration point of choice for encumbrances and budget checks, for example.

NOTE: *Attachments, whether for the entire requisition or for an individual line item, will not be sent to external systems.*

HOW INTEGRATION USES THE APPROVAL FLOW

Integration uses the approval flow to pause the requisition ordering process until information is sent to an external system and a response is received.

REQUISITION INTEGRATION

> **Example:** An agency wants to perform a budget check for all requisitions. Requisition Integration adds an approval step to the eMall workflow that causes the eMall to pass all of the requisition data to the external Finance system. The Finance system verifies the requisition data against the existing budget, returns an approval or a denial to eVA, and the eMall proceeds accordingly.

If your organization is set up for Requisition integration, the eMall will automatically add a Custom Approver to the workflow at the appropriate point to communicate with the external system. The Custom Approver step sends all of the requisition and vendor data to the external system.

The external system will respond with a simple approve or deny transaction; it can include a comment and an error message (for deny transaction) for the requisition. The comment and error message can be used to provide instructions to the eVA user on any other actions they should take, such as changing an accounting code value.

Note: If your agency is set up for only Purchase Order integration (not Requisition integration), the Custom Approver is not added to the approval workflow. See the Purchase Order Integration section in this guide for further information.

Figure 158: Approval Flow with Custom Approver

After the Custom Approver has been approved by the external system, the eMall will move to the next approver in the approval flow.

Withdrawing or Canceling the Requisition

You will not be able to withdraw or cancel a requisition while waiting for a response from the Custom Approver.

Stalled Requisition

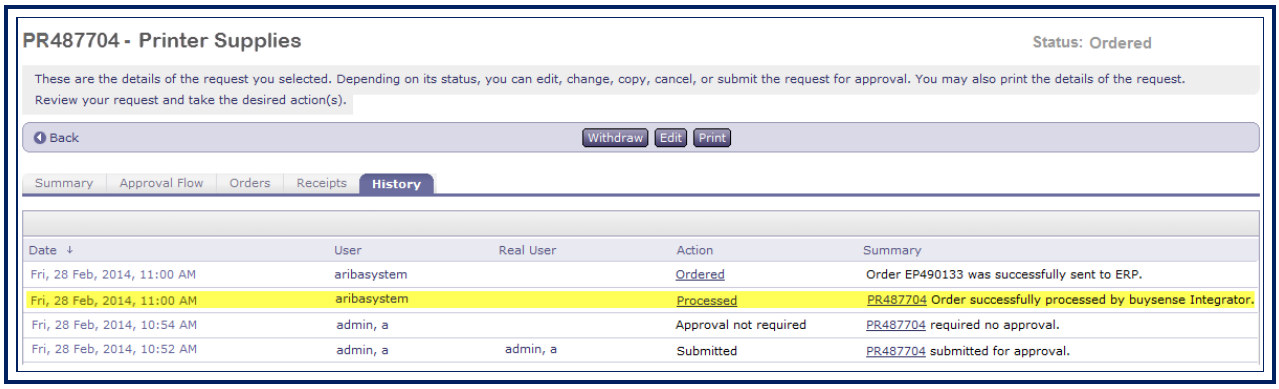
If the requisition has been waiting for a response to the Custom Approver for more than a day, it is considered to have stalled. Contact eVA Customer Care for help in resolving the issue.

PURCHASE ORDER INTEGRATION

Example: An agency wants to encumber funds for a purchase order. Purchase Order Integration ("PO Integration") adds a step *after* the final approval is obtained that causes the eMall to pass all of the order data to the external Finance system. The Finance system encumbers the funds and returns an approval to eVA, along with an ERP requisition number, and the eMall sends the fully approved requisition to the vendor as a purchase order.

PO Integration takes place for eMall orders only after all required approvals have been submitted. The PO Integration step is not displayed on the **Approval Flow** tab; instead, you will find it on the **History** tab, where it is displayed with an Action value of *Sent*, or, as shown in **Figure 159**, *Processed*.

Figure 159: Integration Step Displayed on History Tab



RESPONSES BY EXTERNAL SYSTEMS

Table 22 lists the potential responses an external system can send back to the eMall for an Integration action and identifies the optional supporting information that may accompany that response.

Table 22: Integration Action Responses

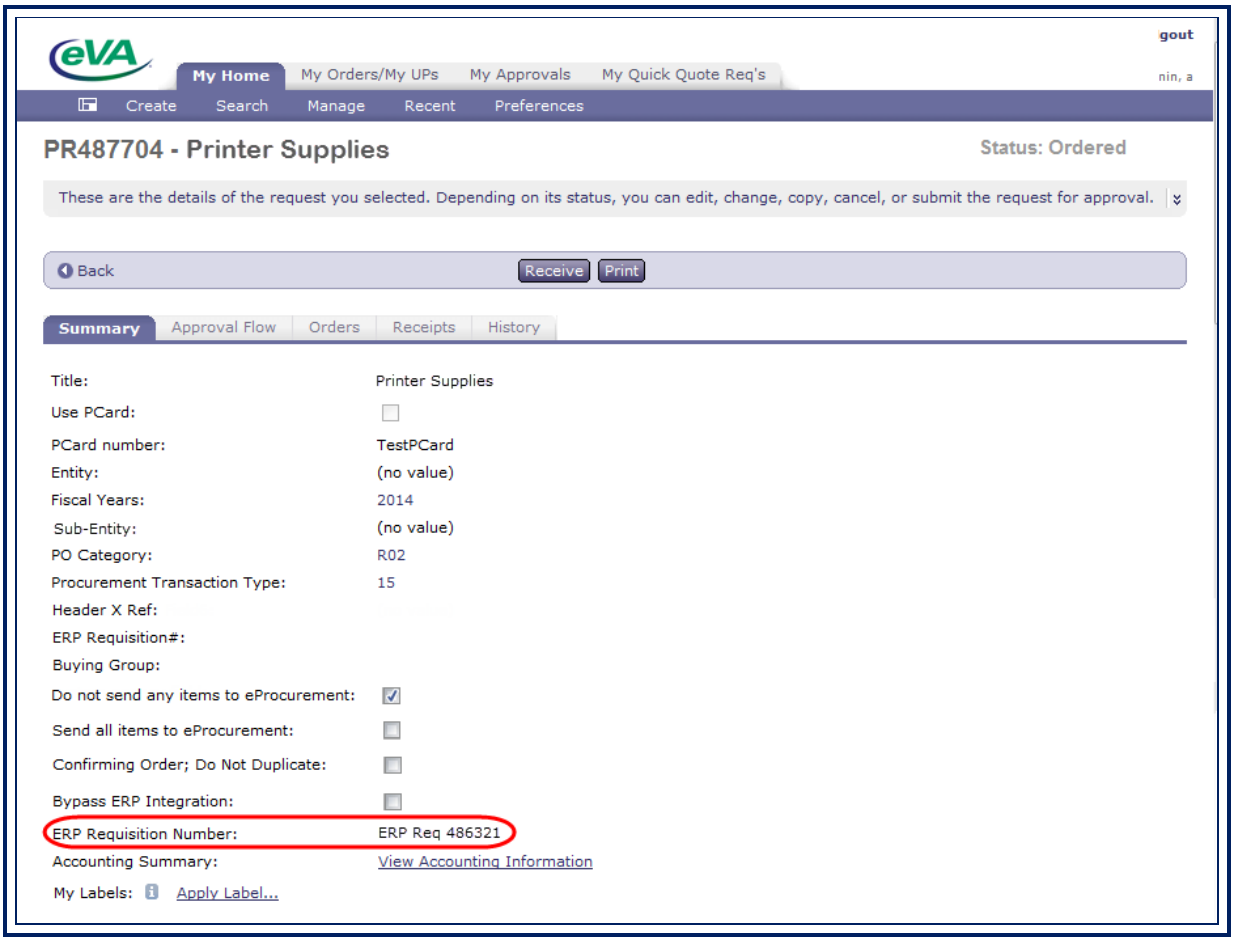
Integration Point	Response	Optional Supporting Information
Requisition	Approve	Requisition Integration Number and a comment
	Deny	Signer Rule value to add new approver and a comment
Purchase Order	Approve	PO Integration Number and a comment
	Deny	Signer Rule value to add new approver and a comment

Approve Response

If the integration point is approved, the external system can assign a reference number as an identifier for the integration transaction and send it to the eMall. These types of values would be captured within the eMall on the standard requisition header field as shown in **Figure 160** below.

Note: The label for this field can be different for each organization, so your screen may be different from the example shown.

Figure 160: ERP Integration Reference Number



The external system can also send a message back to the requisition with detailed information about the approval. This message can be viewed by clicking the appropriate Approved link in the **Action** column on the **History** tab.

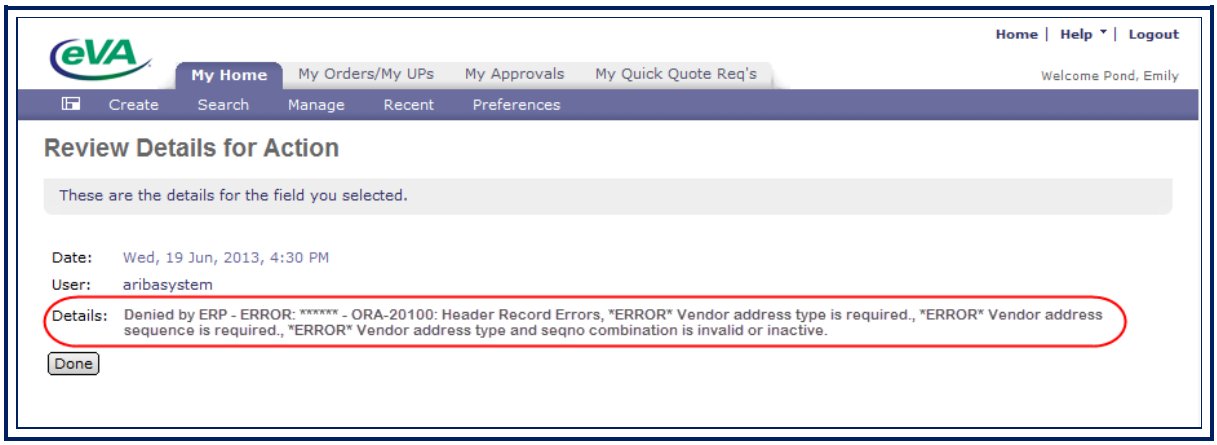
Figure 161: Details of Approve Action Message

Deny Response

If the integration point is denied, the requisition will be processed as a typical workflow denial: an email notice will be sent to the Preparer, and the requisition will be placed in *Denied* status. Along with the denial, the external system can send back a value that will cause a new approver to be inserted into the workflow if the denied requisition is re-submitted by the user. To view a new approver, click on the **Approval Flow** tab of the denied requisition.

The external system can also send a message back to the eMall with detailed information about the denial. This message can be viewed by clicking the appropriate Denied link in the **Action** column on the **History** tab.

Figure 162: Details of Denied Action Message



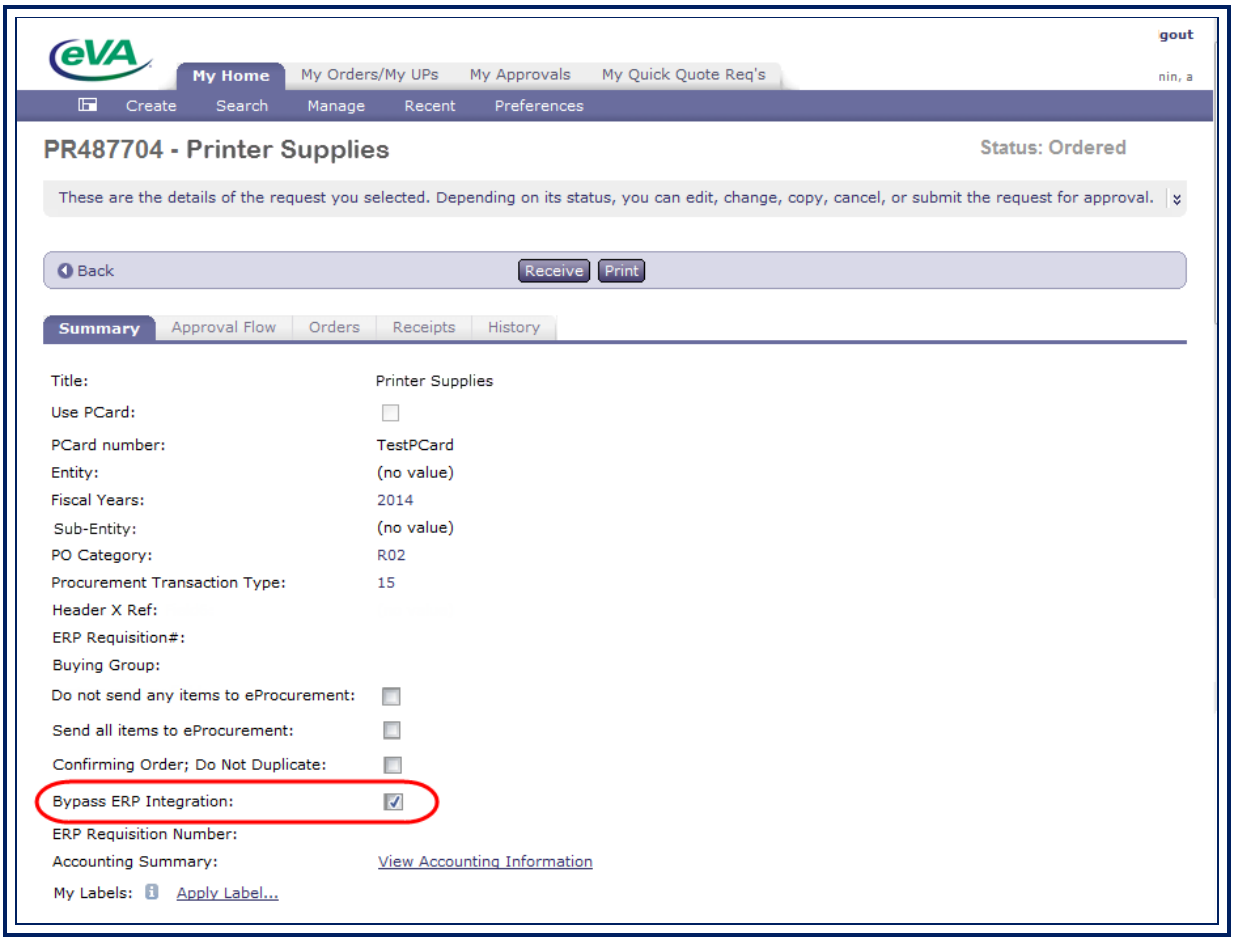
If the ERP system denies a requisition, the requisition could revert to *Composing* status. If this happens, **DO NOT** attempt to remove the original changes using the **Undo Change** button. Doing so results in synchronization issues between Ariba and the agency's ERP system. Instead, open the requisition and edit it.

HOW TO BYPASS INTEGRATION

You have the option to bypass integration for any requisition by clicking the **Bypass ERP Integration** check box on the requisition header (**Figure 163**). When this box is selected, information regarding this eMall requisition and the resulting order will not be sent to the external system.

Your organization may choose to insert an additional approver in the approval flow when this check box is selected. You should NOT select this check box unless your Purchasing Office has provided specific guidance on its use. Contact your supervisor if you are unsure of when to use the **Bypass ERP Integration** check box.

Figure 163: Bypass ERP Integration Check Box



15. GETTING ANSWERS TO YOUR QUESTIONS

The eMall provides several help options for users. The purpose of this section is to give you an understanding of each option so that you will know how to find answers to any questions that arise while you are working in the eMall:

- Inline help tips
- Informational text
- eMall training guides
- eVA Customer Care

INLINE HELP TIPS

Inline help tips appear near the top of many eMall screens, as shown in **Figure 164**. They provide broad guidance regarding the purpose of the screen and the data it contains.

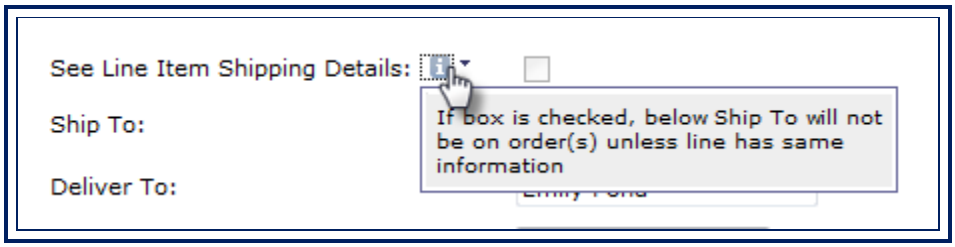
Figure 164: Inline Help Tip Near the Top of the Screen

For example, the inline help for the Requisition Title screen (above) reads, "Enter the requisition title and change one or more of the other requisition fields if necessary. If you are creating the requisition on behalf of another user, that user's accounting, shipping, and delivery information apply."

INFORMATIONAL TEXT

Informational text relates to a specific field on a screen. The presence of informational text is indicated by this icon: . The icon appears beside the field to which the information applies. Click the icon to view the associated informational text (**Figure 165**).

Figure 165: Click to Display Informational Text



USER GUIDES

Although there is a Help link in the upper right corner of every eMall screen, the guides that are available through that link are supplied by the procurement software vendor, Ariba. As such, these guides are very generic and do not address the many customizations that distinguish the eMall. The two volumes of the eMall User Guide, created specifically for eVA users, are the most detailed written resources.

In addition, you can log on to eVA and click the Report and Resource Center link to access eMall overviews and short-form training guides. Click the **Documents** tab as shown in **Figure 166** and scroll down to find the Training section.

Figure 166: Accessing *Report and Resource Center* Documents

COMPUTER BASED TRAINING (CBT)

There are a number of CBT videos available. These short videos provide quick lessons on creating requisitions, ordering from catalogs, editing multiple line items, and more.

To find these CBTs, simply click the **I BUY FOR VIRGINIA** button on the eVA home page, then click the eVA Buyer Training link, located under the banner on the right side of the screen.

eVA CUSTOMER CARE

> ***NOTE:*** *If you have personal computer questions, contact your agency PC support.*

If you have eMall questions for which you cannot find answers, contact eVA Customer . You can:

- Send an email to eVACustomerCare@dgs.virginia.gov.
- Call toll-free, 866-289-7367 from 8AM to 5PM Eastern time, Monday through Friday.

If you have purchasing policy or general operating policy questions, contact:

- Your organization's eVA DPS Account Executive, or
- Your organization's eVA Lead/Procurement Office.

> *See the* eMall User Guide Volume 2 *for information about other eMall functionalities, including Receiving.*
>
> *For information about the eVA system, refer to the* eVA Overview Guide.