

# Purchasing Training

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## Session I

At the end of this session you will have a basic understanding of:

- Training Resources
  - Procurement Rules and Regulations
  - Purchasing Topics
  - eVA Preferences and Organization
  - eVA Navigation
  - Ordering Methods
  - Order Submission
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### I. Training Resources

- A. Vendor Search Manual
- B. eVA eMail Workbook
- C. MasterCard Manual
- D. Purchasing Website

### II. Procurement Regulations

- A. Purpose of eVA
- B. Contracts
  - 1. Mandatory vs. Optional
  - 2. State vs. University
  - 3. State Contract Look-Up
- C. Vendor Selection
  - 1. SWAM Regulations
    - a. Finding a SWAM Vendor
    - b. Documenting Your Quote
    - c. Justification Codes
  - 2. eVA Registration
    - a. eVA Vendor Look-Up
    - b. Ad Hoc Vendors
- D. The Do's and Don'ts of the SPCC
- E. Approver Review

### III. Set-Up and Navigation

- A. Preferences
- B. Definitions

### IV. Getting Organized

- A. Is the purchase over \$5,000?
- B. Do you have proper FOAPAL securities?
- C. Are there restrictions on the FOAPAL?
- D. Are you using the right system?
- E. Are you purchasing from a contract?
- F. Is your vendor registered in eVA?
- G. Does the vendor accept the SPCC?
- H. Is your SPCC established in eVA?
- I. Do you have a SWAM quote?

### V. Creating a Requisition

- A. Add Title
  - 1. Title
  - 2. On Behalf Of
  - 3. Fiscal Year
  - 4. PO Category
- B. Add Items
  - 1. Catalog vs. Non-Catalog
  - 2. Description
  - 3. Commodity Code
  - 4. Supplier and Contact
  - 5. Contract Number
  - 6. Quantity and Price
- C. Add Accounting Details
- D. Checkout
  - 1. Order Review
  - 2. Need by Date
  - 3. Comments
- E. Approval Flow

### VII. PunchOut Catalog Order

### VIII. SPCC Documentation

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## *Session II*

At the end of this session you will have a basic understanding of:

- Process Flow Between eVA and Banner
- Banner Navigation and Receiving
- Relationship Between eVA, Banner and Finance Operations
- Processing and Payment Differences Between DO and PCO Orders
- Change Orders
- Fixed Assets
- Searches and Reports in eVA

You will also have a better understanding of:

- Training Resources
- Catalog vs. Non-Catalog Orders including Editing Differences
- Registered vs. Non-Registered Vendors

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- I. Review of Session I
    - A. eVA Approval Folder
    - B. History Tab
    - C. Test Order
  
  - II. eVA to Banner Process Flow
  
  - III. Banner Receiving
    - A. FOIDOCH – Document Review
    - B. FPIPURR – Purchase Order Review
    - C. FPARCVD – Receiving Document
  
  - IV. Demonstration and Hands-On Practice
    - A. Requisition Entry
    - B. Change Order
    - C. Edits and Deletions
    - E. Log Sheet and Cover Sheet Review
  
  - V. Special Orders
    - A. Design and Printing (Design Services)
    - B. Business Cards (Purchasing)
    - C. Hardware or Software (DoIR)
    - D. Payment Due Upon Completion
  
  - VI. On-Going Assistance
    - A. Training Guides
    - B. Business and Finance Contacts
    - C. Open Lab