



TRAINING MANUAL

ADVANCED LEVEL

September 2004

I. CHANGE-ORDERS

- A. Changing a requisition
 - 1. Prior to submitting for approval . . .
 - a. Edit
 - b. Submit
 - 2. If submitted for approval, but not to vendor yet . . .
 - a. Withdraw
 - b. Edit
 - c. Re-submit
- B. Changing a purchase order
 - 1. If P.O. already sent to vendor – must create change-order to edit
 - a. Retrieve requisition from status folder
 - b. Click on “change” button
 - c. Version 2 (V2) of this requisition will open
 - d. Edit
 - e. Enter comments as needed
 - f. Submit

II. PUNCHOUT CATALOGS

- A. At “Swoosh” screen . . .
 - 1. Click on “Explore”
 - 2. Click on “Catalogs”
 - 3. Click on “Punchout Catlogs”
- B. At “Browse Catalog” screen . . .
 - 1. Click on “Hide Details” to change to “Show Details”
 - 2. Click on “Buy from Supplier”
- C. At vendor’s website . . .
 - 1. Add items to shopping cart
 - 2. Checkout
- D. At eVA requisition . . .
 - 1. Items selected at punchout site will automatically carry over to eVA requisition

III. SEARCHING CATALOGS

- A. At “Swoosh” screen . . .
 - 1. Click on “Explore”
 - 2. Click on “Catalogs”
- B. Use advanced search option
 - 1. Select “entire catalog”
 - 2. Click on “Advanced”
 - 3. Use combination of search fields
Ex: part # and supplier or contract and key term
 - 4. For contract items . . .
 - a. Enter contract number
 - b. Enter supplier part number (if available)

IV. FAVORITES

- A. Use “Favorites” to earmark frequently purchased catalog items
- B. “Favorites” always give you the most current catalog items and prices each time to match your search criteria.
- C. To find the “Favorite” button – click on the underlined product description to display product details.

V. SAVED SEARCHES

- A. Start at “Swoosh” screen
- B. To create a search . . .
 - 1. Click on “Saved Searches”
 - 2. Click on “Create a New Search”
 - 3. “Create Search” screen will display the default search filters
 - 4. Change search filters by clicking on “Add/Remove Search Filters”
- C. Can save or refine searches
- D. Saved searches can be run whenever you want
- E. Locate them under “Saved Searches”

VI. SYSTEM SEARCH

- A. Start at “Swoosh” screen
- B. Under “Explore”, select “System Searches” from list
- C. Under “System Search Name”, select existing search
or
- D. Click “Create New Search”

VII. REPORTS

- A. On “Swoosh” screen . . .
 - 1. Click on “Standard Reports” and select
 - 2. Reports may be saved
- B. At eVA Knowledge Center . . .
 - 1. Click on “Reports and Documents”
 - 2. Explore

VIII. VENDOR SEARCHES

- A. By commodity code
- B. By SWAM (small, women-owned, and minority) businesses

IX. QUICK QUOTE

- A. At eVA Knowledge Center - click on “Quick Quote”
- B. Click on “Create Request”
- C. On Request Header Information screen . . .
 - 1. Enter title
 - 2. Enter close date and time
 - 3. Select bid valid limit
 - 4. Select service area
 - 5. Select award method
 - 6. Enter comment, if desired
 - 7. Add attachment, if desired

- D. On Request Item screen . . .
 - 1. Enter lot number
 - 2. Enter item number
 - 3. Enter description
 - 4. Enter quantity
 - 5. Enter unit of measure
 - 6. Enter NIGP Code
 - 7. Enter need-by date
 - 8. Enter “ship to” information
 - 9. Enter comment, if desired
 - 10. Add attachment, if desired
 - 11. Click on “Save Item”

- E. On Vendor List screen . . .
 - 1. Premium vendors will be shown – cannot deselect
 - 2. Basic vendors shown – may deselect, if desired
 - 3. Ad Hoc vendors – may add vendors, if desired

- F. On Vendor Notification screen . . .
 - 1. Can view notification methods
 - 2. Can view vendors who must be notified by buyer

- G. On Request Review screen . . .
 - 1. Proof before submitting

- H. View responses received
 - 1. Click on “Current Request List”
 - 2. Click on “Evaluate” under “Responses”
 - 3. Click on response link to view response summary

- I. Award and create requisition from evaluation

- J. Retrieve requisition from composing and complete it

NOTES