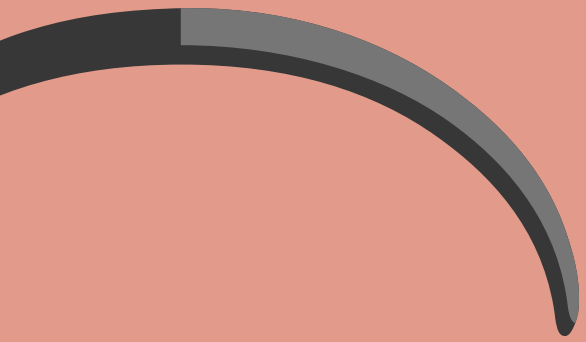
Empower yourself by utilizing eVA Data

Presented by
Gail Kemper
eVA Bureau



FORUM2014

What is the eVA Team hearing from the field about eVA reports?

- How do I know which report to run to find my data?
- There's too much information on the initial screen. What do I need to complete?
- Please explain the data breakdown on the 209 report so we can easily report out on SWAM.

- What advantage does Ad Hoc Reporting tool have over standard reports?

- I don't have time to figure out which report I need and go into eVA each week or month to run it.

- What can these reports give me that I can't already see inside eMall or Quick Quote?

How do I know which report to run to find my data?

VENDOR INFO ONLY

I want to see SWAM vendors registered with the NIGP code for my product/service.

Is this vendor registered? Is this vendor active in eVA? Is this vendor a state-entered vendor?
What is the email address for my vendor?

GENERAL ORDER INFO

I want to see all order details for ONE order, such as Line Items/Approvers/Accounting/Receiving, etc-

Which reports provide Line Item details?

Who are the Top Vendors for my agency?
Which report shows the spend associated with one or multiple accounting codes?

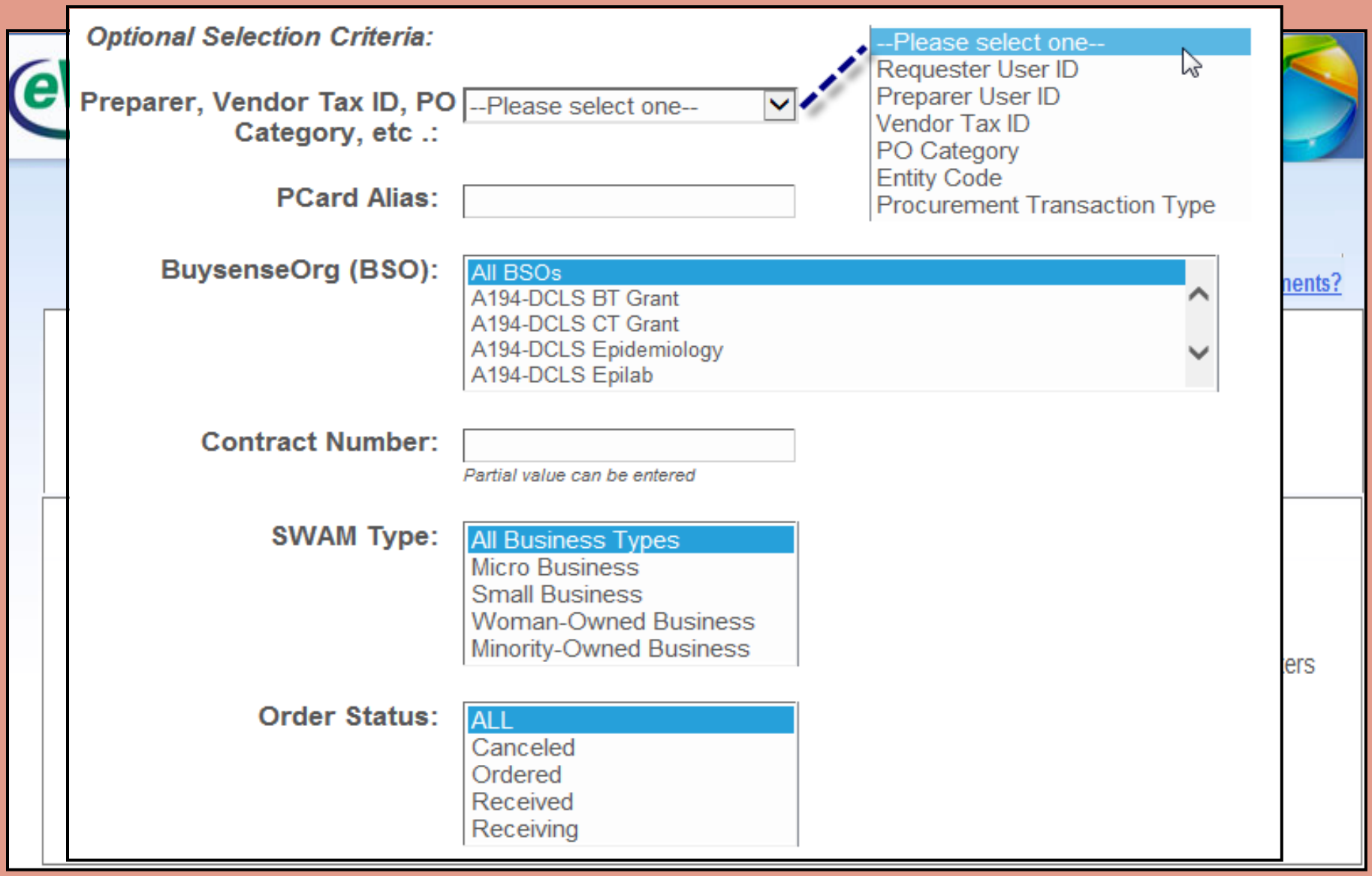
I need **SWAM** stats.

Where can I find my agency's overall SWAM spend stats?

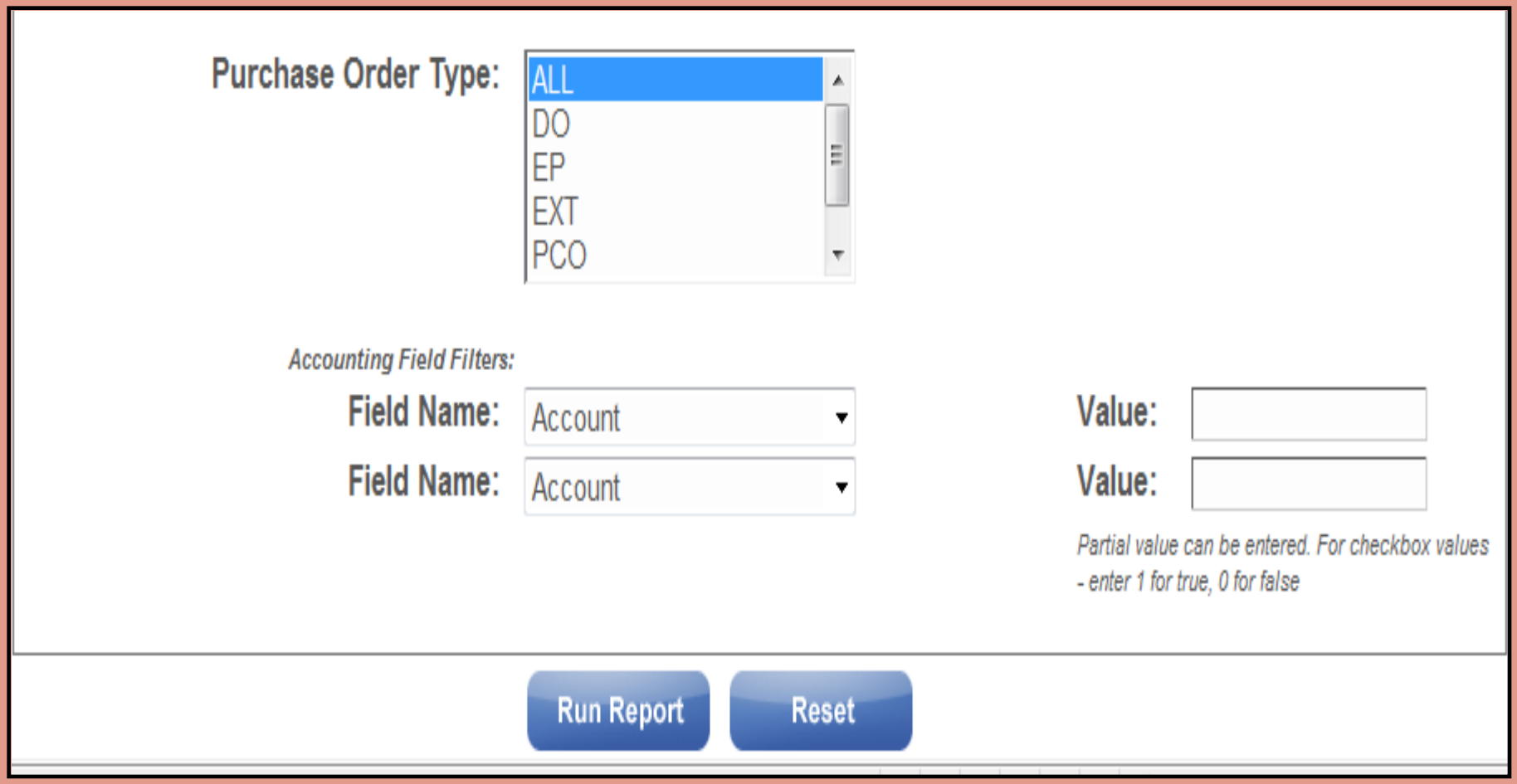
Where can one find Spend and Number of orders with vendor SWAM breakdown for a time period?

I only care about the SWAM stats for my purchases

There's too much information on the initial screen. What do I need to complete?



Bottom portion of 200 report



Please explain data on the 209 report so we can easily report out on SWAM

Typical SWAM Activities Report

Weekly SWAM Activities Report

Agency/Institution Name: _____

Agency/Institution Head: _____ **Phone Number:** _____

Secretariat: _____ **Agency Number:** _____

Quarterly Expenditure History (Last Two Fiscal Quarters)

Quarter	Total Quarterly Expenditures	Total Expenditures MBE Suppliers		Total Expenditures WBE Suppliers		Total Expenditures SBE Suppliers	
		Amount	%	Amount	%	Amount	%
FY14 Qtr 4	$5,999,811.03	$172,717.08	3%	$439,178.01	7%	$1,046,260.67	17%
FY14 Qtr 3	$4,692,204.66	$93,689.26	2%	$225,326.65	5%	$737,056.84	16%

AGENCY SWAM ACTIVITIES:

Type	Vendor	Orders	Amount
Minority	Daly Computers Inc	2	$722.25
	Professional Moving & Storage	1	$3,619.13
	Sniders Courier Service	1	$210.00
	Central Hardware Supply LLC	1	$220.00
	Superior Global Solutions Inc	3	$181.80
Small	Caliper Inc	1	$591.84
	Cavalier Reporting Videography	1	$1,017.00
	Central York Corporation	1	$1,363.76
	Cobb Technologies Inc	1	$2,619.84
	PeerPlace Networks	3	$334,247.00
	The Richmond Catering Company llc	1	$128.72
	Advance Safety Equipment Co	1	$449.21
	Augusta Office Products Inc	1	$144.00
	Bottenfield Excavating LLC	1	$4,804.00
	Don Largent Roofing, Inc	2	$1,800.00
	E & F Elevator Inspections & Consulting	1	($600.00)
	Electric Connection Inc	1	$3,888.58
	Lawrence Sanitary Company Inc	1	$743.90
	Major Safety Service Inc	1	$293.70
	PD Interiors Inc	1	$164.00
	Richmond Alarm Company	1	$1,625.00

Weekly SWAM Activities Report

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Agency/Institution Head: _____ **Phone Number:** _____

Secretariat: _____ **Agency Number:** _____

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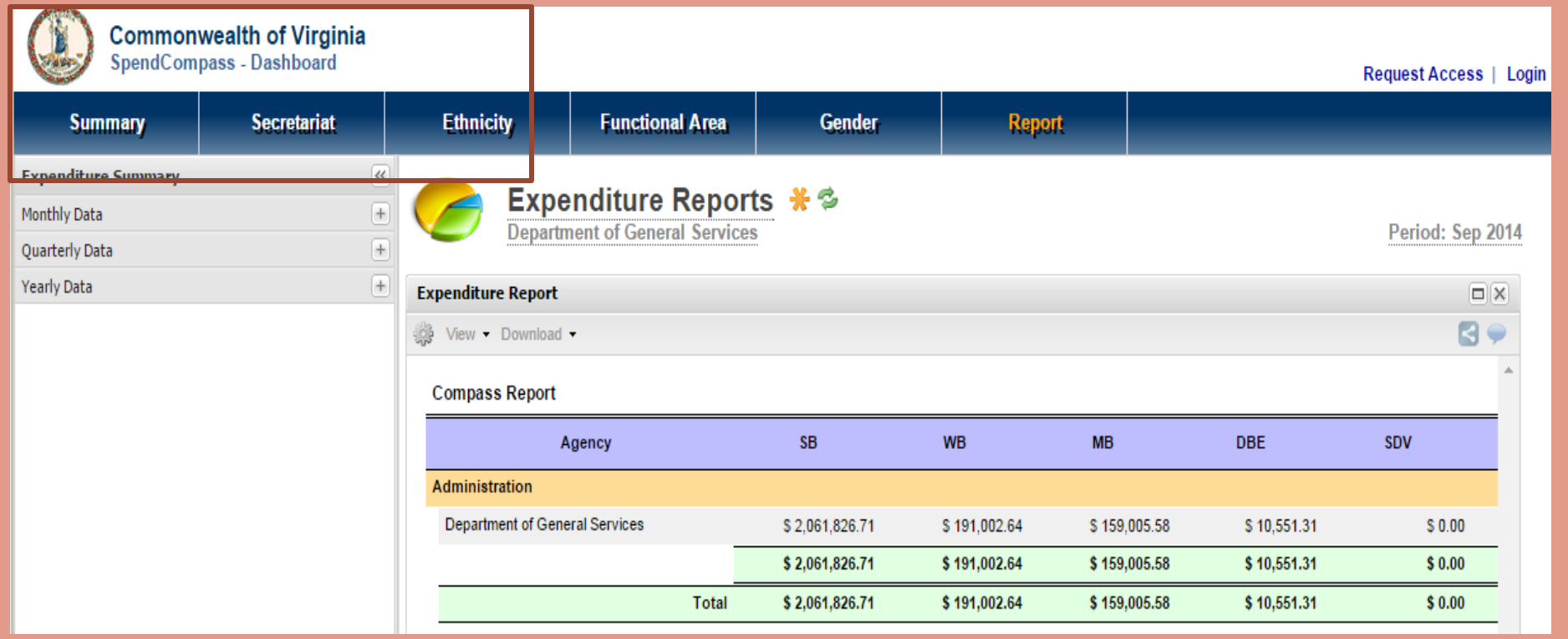


209 - SWAM Vendor Summary with FY Totals

Suggestions/Comments?

Entity: A194DGS

Select Date: Last Month

From: 09/01/14
To: 09/30/14

SWAM Type:
- All SWAM Business Types
- Micro Business
- Small Business
- Woman-Owned Business
- Minority-Owned Business

Order Source: ☑ In eMall ☐ Outside Of eMall

Run Report | Reset

Summary

	Report Period	Current FY
SWAM Spend to All Spend:	10.51%	23.28%
Small Spend to All Spend (Included Micro):	8.86%	17.34%
Micro Spend to All Spend:	0.00%	0.00%
Woman-Small Spend to All Spend (Included Micro):	1.30%	5.39%
Woman Spend to All Spend:	0.00%	0.00%
Minority-Small Spend to All Spend (Included Micro):	0.33%	0.49%
Minority Spend to All Spend:	0.01%	0.07%

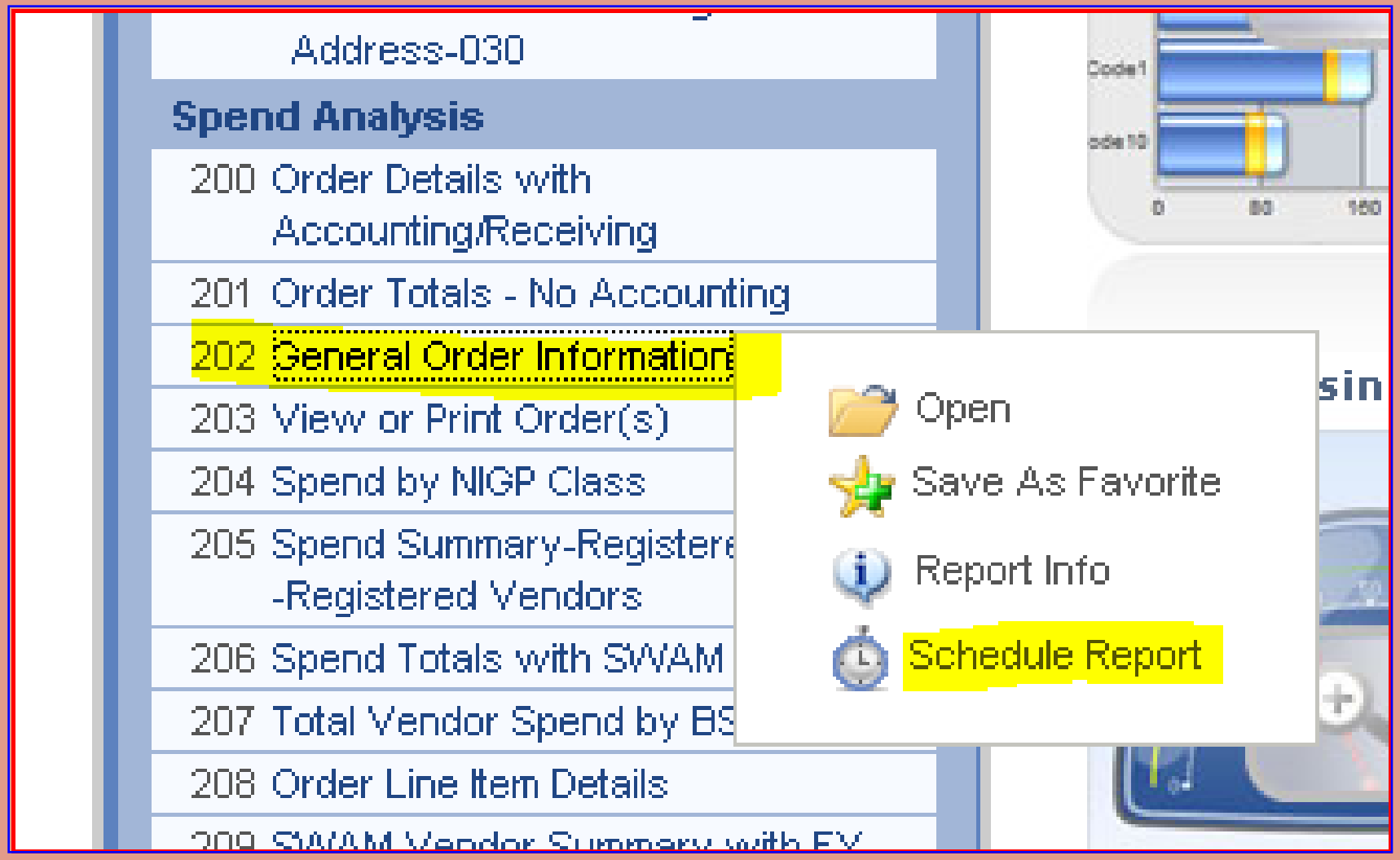
	Order Count	Total Spend
TOTALS FOR ENTERED PERIOD (includes non-SWAM)	689	$30,835,585.47
TOTALS FOR CURRENT FY (includes non-SWAM)	2,797	$52,227,234.08
TOTALS FOR CURRENT FY (SWAM only)	1,357	$12,160,839.63

	B W WILSON PAPER CO INC	2	$2,265.71

I don't have time to figure out which report I need and go into eVA each week or month to run it.

Let the system do the work for you!

Invest a small amount of time in setting up your report – then sit back and wait for the data to come directly to you!


Address-030
Spend Analysis
200 Order Details with Accounting/Receiving
201 Order Totals - No Accounting
202 General Order Information
203 View or Print Order(s)
204 Spend by NIGP Class
205 Spend Summary-Registere
-Registered Vendors
206 Spend Totals with SWAM
207 Total Vendor Spend by BS
208 Order Line Item Details
Open
Save As Favorite
Report Info
Schedule Report

Report Scheduler
202 - General Order Information

Suggestions/Comments?

Learn about Scheduler

A Report Scheduler Log contains a listing of all scheduled reports. To view this log, click here.

Entity: A242CNU

Query Selection:
- ○ Specific Order #
- ○ Specific Requisition #
- ◉ Multiple Orders

Select Date: Last Month

From: 09/01/14
To: 09/30/14

Order Source: ☑ In eMall ☑ Outside Of eMall

Vendors: ☑ Self-Registered ☑ Un-Registered ☑ State-Entered

Optional Selection Criteria:

Specific Vendor: *(choose one)*
- ○ Vendor Name (Partial value can be entered)
- ○ Vendor Tax ID
- ○ Vendor Location ID (VLIN)
- ○ eVA Vendor ID (VCUST)

Preparer or Requester?
- ○ Preparer User ID
- ○ Requester User ID

Scheduled Report Details

Frequency: Once Scheduler will begin at 5 a.m.

Start Date 10/18/14

Report Output Name: Last Months Orders *Valid characters for name include letters, numbers, spaces, dashes and underscores(_)*

Add Run Date & Time to Report Output Name

Task Description: Total Spend_Last Month

(For example:"Mary Smith-A/P Daily Orders")

Active (When selected, the report will run at its scheduled time)

Delivery Method and File Type
Choose one or both*

(Choosing both options will double the run time.)*

Email File Type: MS Excel

Files will be sent in the WinZip format.

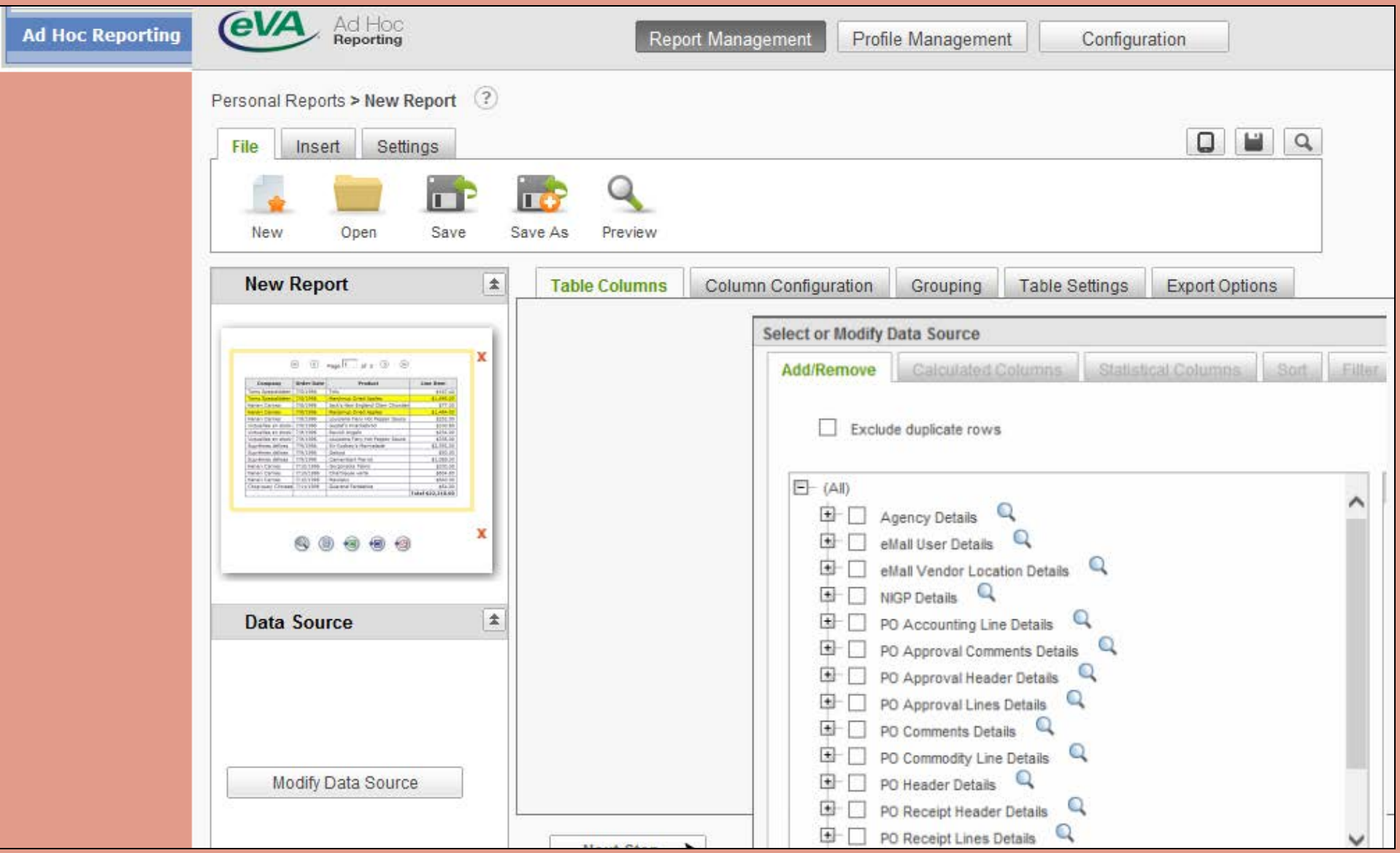
Send in WinZip format

Email Addresses: Gail.Kemper@dgs.virginia.gov

Use a semicolon to separate multiple email addresses.

Online - in my Scheduled Reports Category

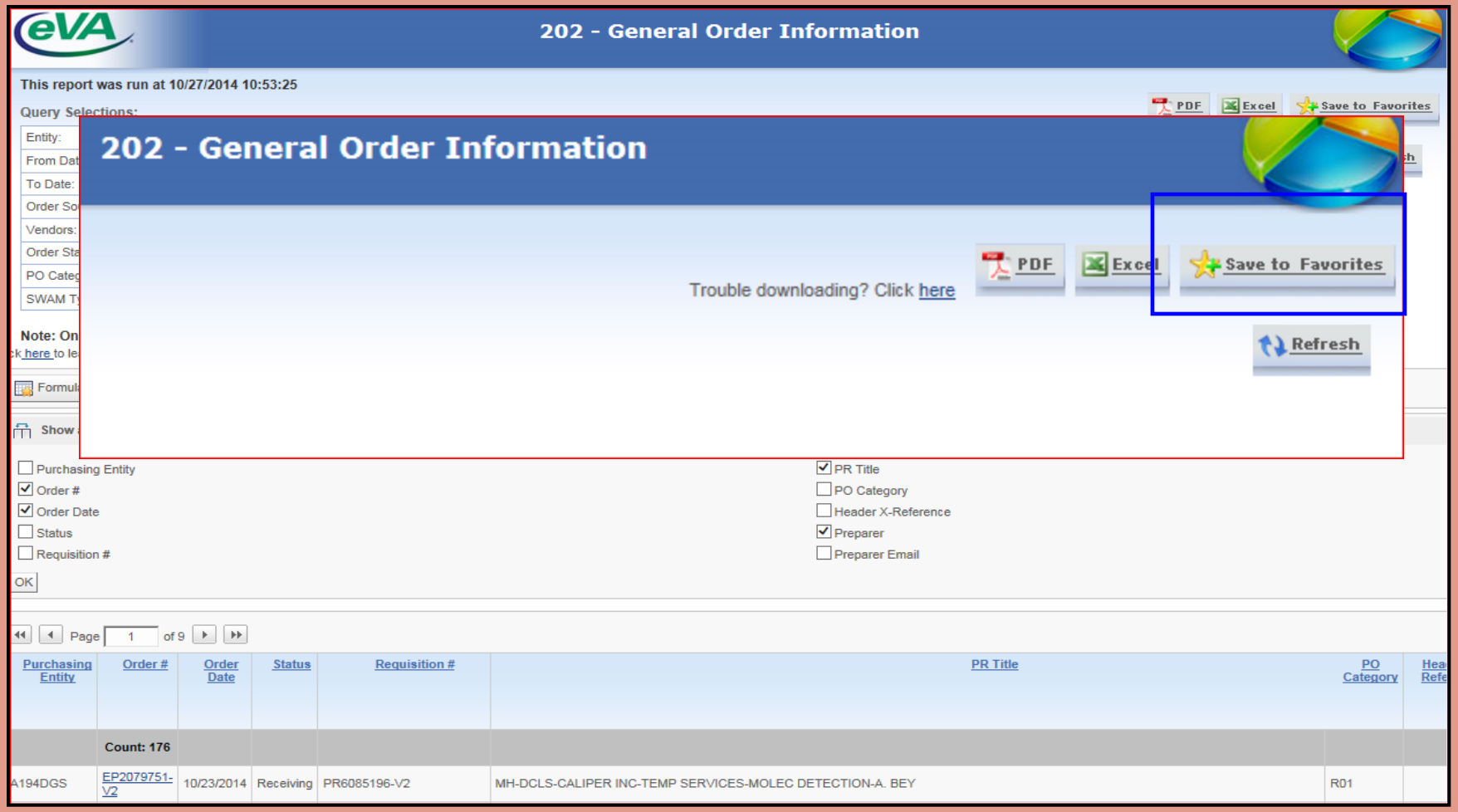
What advantage does the Ad Hoc Reporting tool have over standard reports?



How does one customize a standard report?

IT'S EASY!

First, simply run your regular report.



Report and Resource Center

Welcome Gail Kemper

Click here for Report Reference Guide

Select Environment: Production

Return to Portal

Purch. & Supply EtoE Bob - Your Reporting and Resource Portal

Displayed data is current as of the previous day.

Reports | Documents

P194-Scheduled Reports

Buyer Reports

Vendor Data

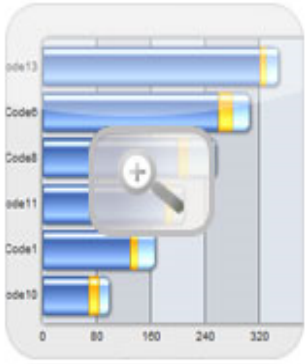
- 100 Vendor Data by NIGP Code
- 101 General Vendor Information
- 102 Vendor Location for Specific Order

Spend Analysis

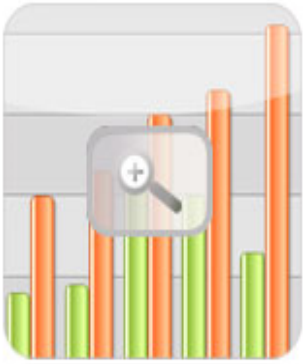
- 200 Order Details with Accounting/Receiving
- 201 Order Totals - No Accounting
- 202 General Order Information
- 203 View or Print Order(s)
- 204 Spend by NIGP Class
- 205 Spend Summary-Registered vs. Un-Registered Vendors

Charts based on: A194DGS

Top 20 Commodities



Solicitation Postings



Small Business Spend

Top 20 Vendors

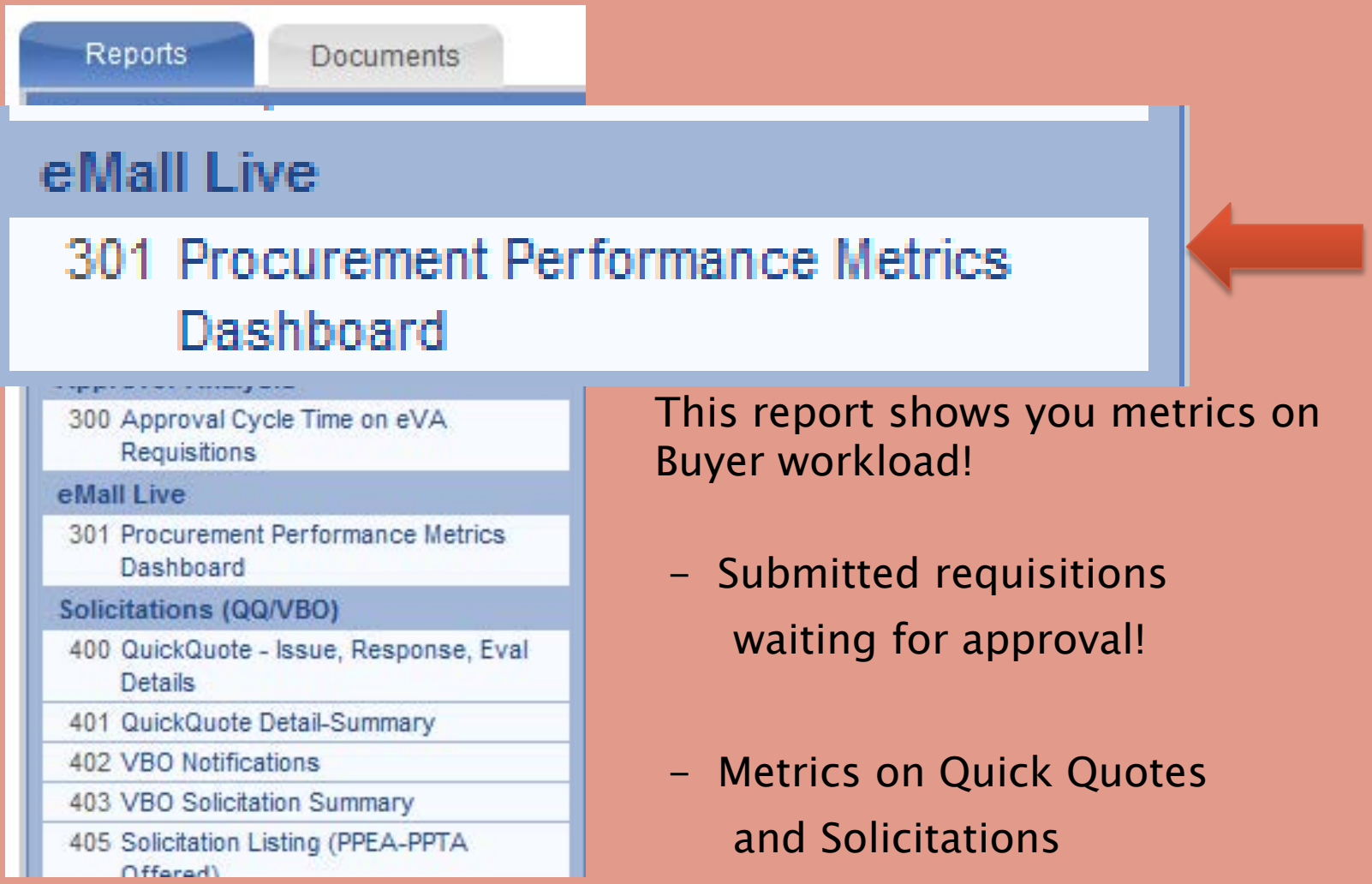
Reports | Documents

My Favorites

Nbr	Description
200	ProcType_A194_LastMonth_Construction
202	Last Weeks Orders
205	Spend Summary-Re... Registered Vendors
207	Total Vendor Spend
213	Top Vendor List
500	Pcard User Assignm...

- Open
- Edit Description
- Remove
- Schedule Report

What can I see that I can't already see inside eMall or Quick Quote?



This report shows you metrics on Buyer workload!

- Submitted requisitions waiting for approval!
- Metrics on Quick Quotes and Solicitations

Requisitions | Current QQ's & Solicitations | Period QQ's & Solicitations

Requisitions Waiting on Approval (By Requester)

Requisition Count by Person/Role waiting for their Approval (<=30 vs. > 30 days)

- Hover for Counts, Total Dollars, and Avg Age
- Click here to view Drilldown Report

Total Req. Count: 88 *Average Age (<= 30 Days):* 2.38

Check to change view to see current approvers

PROCUREMENT PERFORMANCE METRICS

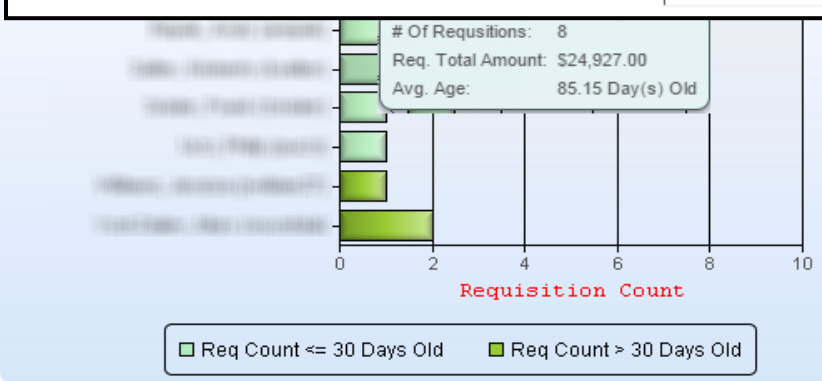
Entity: A194DGS

Show Query Selection [+] Hide Parameters [+]

Buysense Org:
- All BSOs
- A194-DCLS BT Grant
- A194-DCLS CT Grant
- A194-DCLS Epidemiology
- A194-DCLS Epilab
- A194-DCLS Food Feed
- A194-DCLS Immnuology
- A194-DCLS Metals
- A194-DCLS Microbial
- A194-DCLS Pulse Net

Submit Changes | Reset

*Charts display top 20 for selection; drilldown report shows all



Requisition Approval Time Analysis

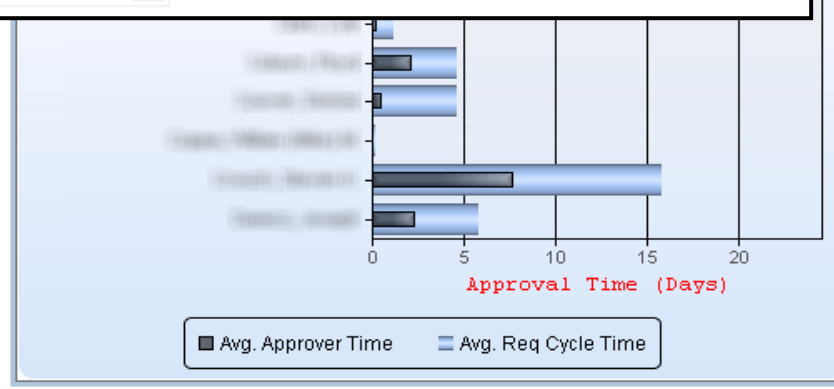
Requisition total approval time compared to Person/Role share of that time

- Hover for Counts and Avg Age
- Click here to view Drilldown Report

Max Avg. Approval Time: 0.91 Day(s) *Max Avg. Req Cycle Time:* 2.97 Day(s)
Total Req. Count: 4761

Select Date: Last Quarter

Begin Date: 07/01/14
End Date: 09/30/14



Need help? Contact eVA Customer Care at 866-289-7367 or 804-371-2525

This report was run at 10/30/2014 15:37:22

Query Selections:

Entity:	A194DGS
BSO:	ALL BSO

Drilldown Example - PR's awaiting approval

Requester	Req Count	Requisition Total	Avg Age <= 30 days*	Avg Age > 30 days*
[redacted]	1	$275.88		1 @ 176.20
[redacted]	8	$1,725.40	1 @ 28.19	7 @ 291.24
[redacted]	1	$371.40	1 @ 8.10	
[redacted]	1	$67.00	1 @ 1.25	
[redacted]	1	$2,323.35	1 @ 15.30	
[redacted]	2	$121.69	1 @ 7.18	1 @ 85.02
[redacted]	1	$21,843.00	1 @ 0.07	
[redacted]	1	$320,320.00	1 @ 0.04	

Requester

PR#	Title	Requisition Total	Requester	Created	Submitted	Type	Role/UserID	Role Approver	Approver Active Date	Approved Date	Approval Time	Approval Age
PR6258876	MND/DO/Supply Room/Unit Price Update for PR6229680/HR	$117.69	[redacted]	10/23/2014 11:07 AM	10/23/2014 11:15 AM	Routine (R01)	A194-CC111	[redacted]	10/23/2014 11:15 AM			7.20

Requisition Age (Days): 7.20

PR#	Title	Requisition Total	Requester	Created	Submitted	Type	Role/UserID	Role Approver	Approver Active Date	Approved Date	Approval Time	Approval Age
PR6145313	MND/DO/Daly Computers/Computer Mouse/HR	$4.00	[redacted]	08/06/2014 09:17 AM	08/06/2014 02:04 PM	Routine (R01)	A194-SOFTWARE-4316	[redacted]	08/06/2014 02:04 PM	08/06/2014 03:02:00 PM	0.04	
							A194-CC111	[redacted]	08/06/2014 03:02 PM			85.04

Requisition Age (Days): 85.08

[redacted]	1	$355,025.00	1 @ 0.01	
[redacted]	1	$948.00	1 @ 0.03	
[redacted]	1	$453.25	1 @ 1.22	
[redacted]	10	$11,840.73	10 @ 1.07	
[redacted]	1	$1,989.00		1 @ 252.09
[redacted]	1	$733,603.00	1 @ 0.08	
[redacted]	1	$458.24		1 @ 128.07
[redacted]	3	$6,950.00	3 @ 3.51	
[redacted]	2	$425.00		2 @ 483.66
TOTALS:	**70**	**$2,925,536.64**	**48 @ 2.95**	**22 @ 203.56**

* Age = Days user has had to Approve

ty: A194DGS

w Query Selection Hide Parameters

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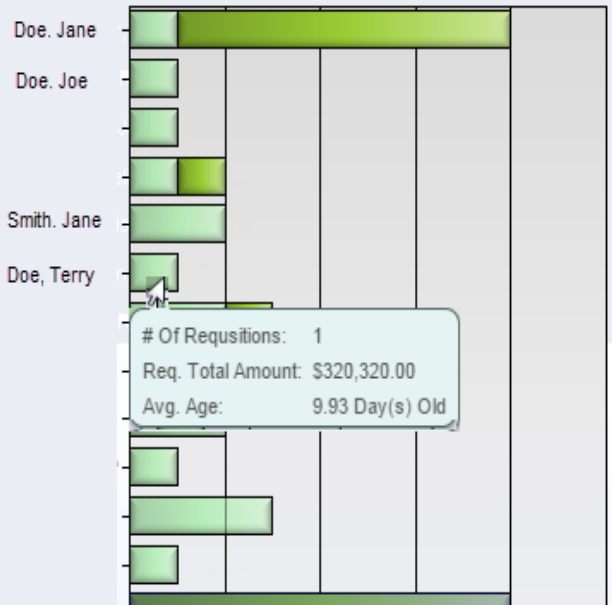

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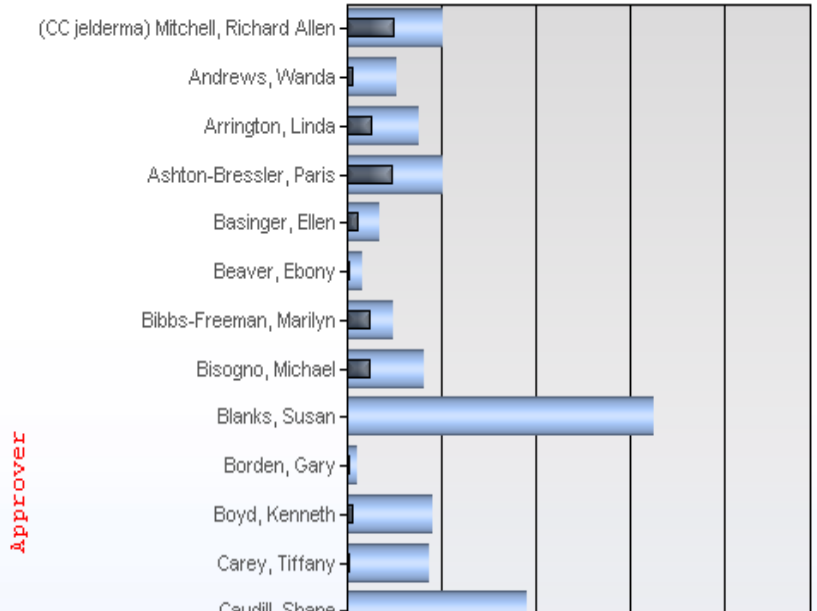


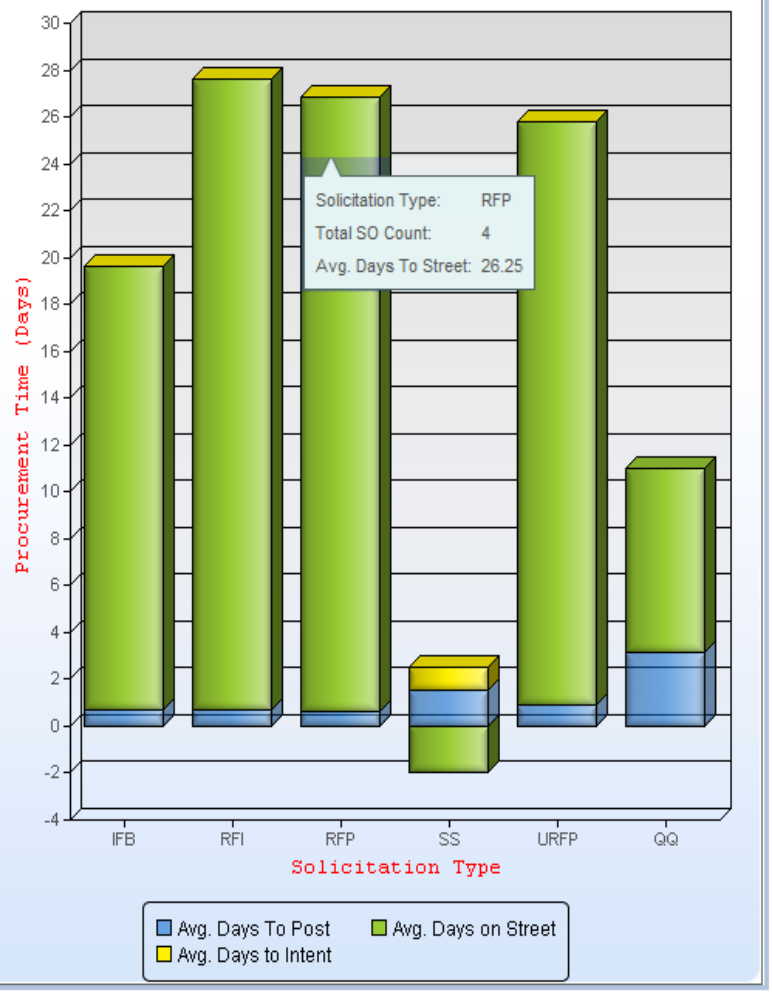
CSMA Hampton District
CSMA Headquarters
CSMA Portsmouth District
CSMA Richmond District

Requisitions | Current QQ's & Solicitations | Period QQ's & Solicitations

Active Solicitation Time Analysis by Type

Solicitation Types and time spent to reach key procurement milestones

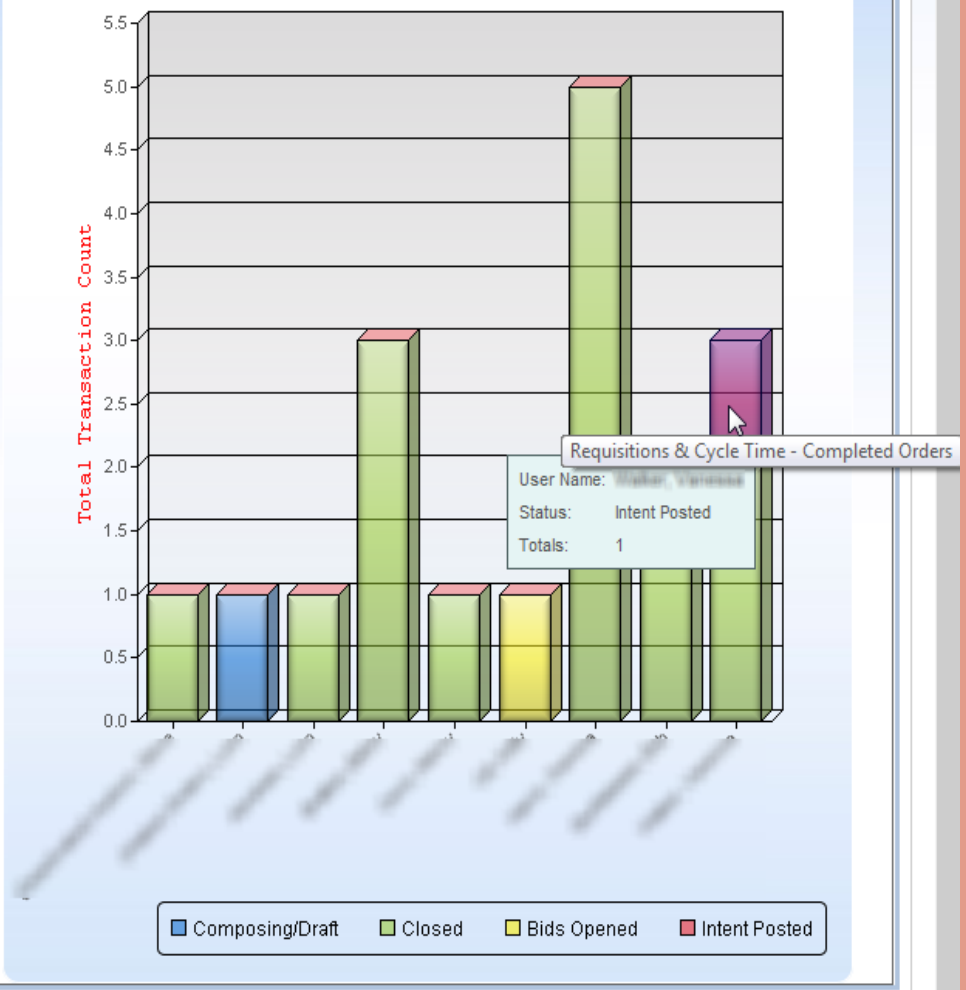
- Hover for Counts and Avg Age
- Click here to view Drilldown Report



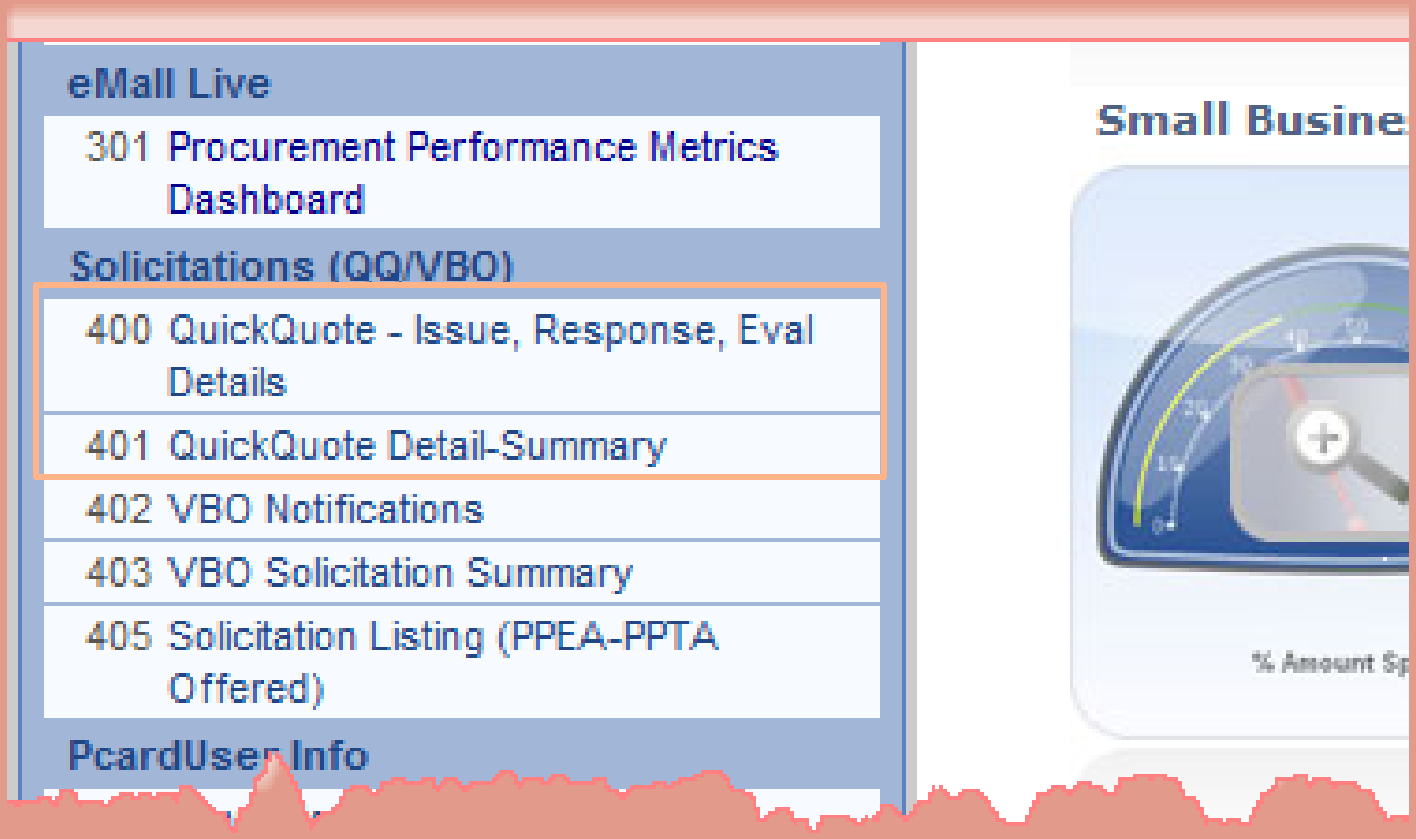
Active Solicitations by Person

Number of Solicitations & QQ's by Buyer grouped by Current Status

- Hover for counts
- Click here to view Drilldown Report



... and more Quick Quote



400 - QuickQuote - Issue, Response, Eval Details

This report was run at 11/05/2014 10:54:15

Note: Current Version of QQ is V1

QQ Header

Request ID	Status	Parent Request ID	Request Title	Buyer Name	Entity	Buyer Email	Create Date	Issue Date	R D
QQ204105	Awarded		KD/VDC/MARGARINE SOLIDS {2 LOADS}/10-14	Davis,Kevin 804-328-3228	A194DGS - Department of General Services	kevin.davis@dgs.virginia.gov	10/23/2014	10/23/2014	10/2 01:0

QQ Request Line Items

Request ID	Lot #	Line #	Commodity Code	Line Description
QQ204105		1	39056	960426- MARGARINE, VEGETABLE OIL, COLORED W/15000 IU VITAMIN "A" ADDED, 30/ 1 LB.SOLIDS/C

Vendor Header Responses

Vendor Name	Response ID	Response Status	Response Title	Comments	Attachments	Response Date/Time
DORI FOODS INC (C13941)	541114705_EVA001_QQ204105_RESP_1	Active	DORI FOODS, INC.	1/2 OF 1%-20 DAYS		10/28/2014 12:39:57 PM
Wm R Hill & Co Inc (E5154)	540843487_EVA001_QQ204105_RESP_1	Active	Margarine	2% 20, net 30 days		10/28/2014 11:12:56 AM

Vendor Line Responses

Vendor Name	Registration Type	SWAM	Lot #	Line #	Response ID	Paper Response	Line Description
DORI FOODS INC (C13941)	Self-Registered	S		1	QQ204105_RESP_1		960426-MARGARINE, VEGETABLE OIL, COLORED W/15000 IU VITA
Wm R Hill & Co Inc (E5154)	Self-Registered	S		1	QQ204105_RESP_1		960426-MARGARINE, VEGETABLE OIL, COLORED W/15000 IU VITA

Buyer Comments

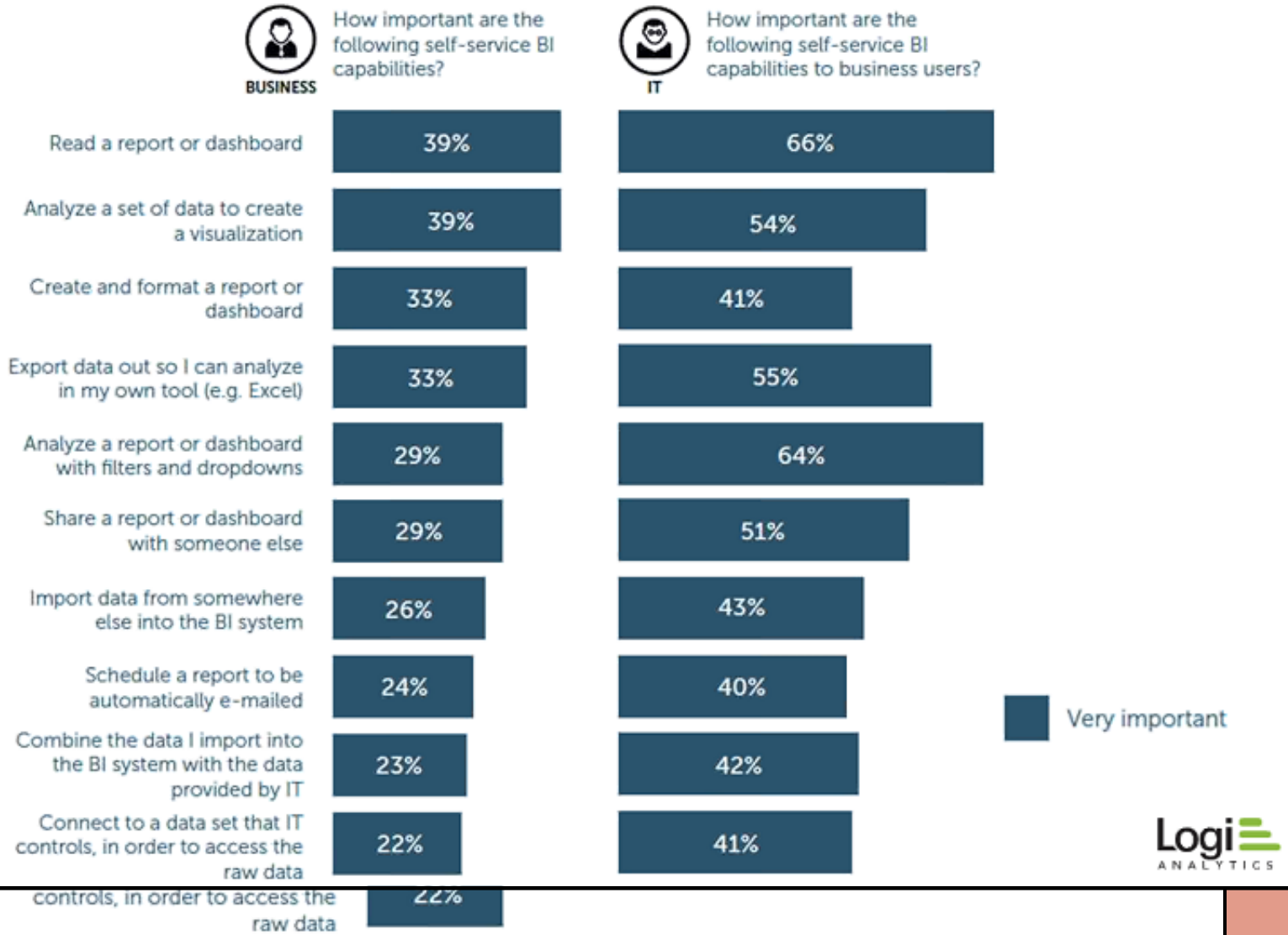
Request ID	Comment	Comment Type	Publish
QQ204105	Awarded vendor's stated prompt payment discount was "larger" than the other bidder's.....award done in the best interest of The Commonwealth.	Evaluation	10/29/2014

Buyer Evaluation

Request ID	Vendor Standard Location Name (VCUST)	Vendor Contact Email	Response ID	Decision ID	Decision Date	Evaluation Method	Lot #	Line #
QQ204105	Wm R Hill & Co Inc (E5154)	dtwaldo@bellsouth.net	QQ204105_RESP_1	AWD_69047	10/28/2014	Line		1

Sum of Eval Method

Capabilities Ranked by Importance



It's YOUR Turn

What features are you seeking to illustrate your eVA data?

Comments?

Questions?

FORUM2014