



Below is an overview of new procedures that rolled out with NextGen. If you are unfamiliar or have questions, please reach out to TESS or your Procurement team for assistance.

NextGen offers full transparency of UMW requisition and purchase orders. Buyers need to use filters to view their own orders and take caution when editing or canceling to ensure the order is your own.

Star your Suppliers before entering requisitions or catalog orders, it will save you time in searching for and using the correct Supplier.

You can also star your favorite requisitions for use of the Duplicate (copy) feature or for tracking.

Copy Order (Duplicate) at the requisition level, Change Orders at the Purchase level.

Change Orders will not copy in prior comments or contract numbers. Re-enter the contract number on each new line item of the order. Re-enter new comments to the Supplier as necessary.

Change Orders must update the fields of *Change Type(s)* and a *Description of the Changes*. Best practice would be to also update the *Comment* field for the Supplier. Make sure to be exact on the change reason and please add the new line number.

Additional Info for Converted Change Orders - those within the Browse feature and have the prior EP or PCO order numbers

Contact TESS or your procurement representative if your converted EP order (those listed within the Browse feature) requires a Change Order.

Change orders for converted PCO orders works as expected. Use the new PCO number when initiating the change.

On Behalf Of (OBO) purchase card (pcard) process requires the cardholder to enter their own pcard within eVA. This is accomplished by use of the Adhoc Approver process. It is now a two-step process:

The person creating the requisition will update Header 1 with the appropriate payment method.

For purchase card orders, buyers must remember to add their pcard to the requisition from the left blue menu option.

Buyers must remember to enter the UMW contract number within the *External Contract* field.

Punch-out Catalog purchases are started within the catalog, not the requisition. Within the catalog the *submitted cart* action creates a new eVA requisition. You can no longer go back and forth between the requisition and the catalog to add or delete items. A new requisition will be created each time you return to the catalog and resubmit the cart. Remove catalog items from the requisition.

Approvers must *Reject* the order to allow the buyer to edit requisition fields. The Messaging or Blog feature is used to communicate between Approver and Buyer or add notes to requisition. Continue to add PO documentation to the Internal Comments Field (Quotes, VP Approvals, SPP coding...)

Messaging works best within the requisition. For general questions to Procurement, continue to use email. Suppliers must self-register within eVA or you may obtain the necessary information and enter the vendor yourself.

If entering an Ad Hoc Vendor (Supplier) ensure you update Internal Comments with your due diligence actions for vendor to self-register within eVA. (date of email and response and/or attachments to support Supplier choice).

Ad Hoc entry is available via the *Create Confirming Order* process

Suppliers requesting check payment must have a Banner vendor record prior to the eVA entry.

Buyers can validate the Banner vendor record by running the Cardinal Verified Vendor Report.

Request for Banner vendor setup is requested via the AP webform. Buyers or Suppliers can fill out the web form to receive information from Account Payable for secure form upload.

Suppliers are still having issues receiving purchase orders. The order can be printed and sent by you.

FOAPAL coding is not visible on the order after the order is fully approved to PCO or PO status. FOAPAL can be entered in the Supplier box, the Internal Comment Field at the Header Level, the Messaging feature, or within the allocation area (Acc Reference). Please note that these fields do not have reporting capabilities. **Update is forthcoming.**

Use the 203 or the 200 report within Report Center to print your order with FOAPAL information.

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