University *of*
Mary Washington
Training, Evaluation, and System Support

# **Helpful Links** – Finance & Procurement

Below are links to commonly used information regarding the procurement of goods and services at UMW as well as links related to the use of technology at UMW.

Organizing bookmarks by folders is especially helpful when managing a wide variety of information.

- How to create bookmarks and folders in Google Chrome

## TESS (Training Evaluation & System Support)

- Finance Contact List – not sure who to contact? Look here!
- Instructional Materials – step-by-step guides related to procurement and finance processes
- Finance Reporting (SharePoint) - Reports such as the *Cardinal Verified Vendor Report* are found within Report Central
- Purchasing Resource Guide – Quick reference guide to topics related to the procurement of goods and services

## Procurement Services

- Purchase/Payment Approval Form/ Cabinet Approval  -this form is required for purchases over $1000.00
- Technology Request form – review and/or complete for all technology purchases
- Exemptions to Competitive Requirements Document
    - o Some purchases are exempt from eVA entry and/or the requirement of a small business micro quote use this document for guidance
- Cobblestone - Searchable database of all UMW contracts. Mandatory contracts are listed here.
- SPCC – Small Purchase Charge Card Information
- Works (Bank of America)

## Accounts Payable

- Business Meal and Food Regulations
    - o Information about providing food for events. Preapproval is always required and there are many regulations surrounding food and appropriate use of charge card.
- Chrome River
    - o Use for travel and personal reimbursements and travel preapproval.
- Vendor Selection
    - o Steps to consider prior to engaging in services with and individual or company.
- Independent Contractor
    - o An Independent Contractor is a person, not company, hired for services. Individuals may or may not require eVA entry dependent on service provided.  This listing shows pre-approved service types
- Direct Pay
    - o Also called check requests, these are direct entries into Banner for check payments outside the eVA process.  These vendors do not accept the charge cards.
- Pre-Payments

- o Prepayments are payments we make in advance of the full service that typically extends over a period of time, such as subscriptions.  Prepayments have special coding and terms of service tracking.
- Banner Receiving – Instructional materials to guide you through receiving in Banner

## UMW Wide Technology Resources

- UMW Technology Information – this page contains information for new employees as well as information related to email, NetID, software guidance, wireless connectivity and more.
- ZOOM Phone – resources to guide you on the use of ZOOM phone
- VPN – information regarding VPN access
- Microsoft Teams – information and training materials for the use of Teams
- Microsoft Snipping Tool – instruction on the use of the snipping tool to capture and mark up screen shots