Current Purchase Order Conversion Process Detailed Information

We have been informed that Purchase Orders updated within the past two years will convert into the new eVA platform but will be assigned a new purchase order number, (i.e.: prefix will update to “PO” followed by a new transaction number). The current eVA PO number (i.e.: EP12345) will be visible and searchable to buyers and suppliers as a reference number in the new platform. Because of these PO number changes, the following processes must be implemented during the transition.

Preparing for the new platform—Review Open PO’s/Encumbrances Now:

- Any transaction that is older than two years but has been modified within the two-year window will be converted and available to you.
- Users will only be able to create a ‘Receipt’ (Receiving) on all converted purchase orders.
- If a CHANGE ORDER is needed or anticipated for converted purchase orders, users MUST cancel the existing order and create a new order. If you wish to ‘track’ that original purchase order in your new PO, you can add the original purchase order number for reference as a comment.
- Change Orders will not be processed on existing PO’s converted to new platform.
- Going forward, Purchase Orders will only stay open for no longer than 12 months.
- If no changes are anticipated, the PO can stay open and will be received as normal in the new platform.

SUMMARY

1. If change orders are anticipated on existing PO’s, close current PO before December 15th, preferably as soon as you get a final invoice for Calendar Year 2021.
2. Once you receive final invoice, receive in eVA and MARK FINAL PAY against PO. This will release remaining funds to your budget and close PO.
3. Once encumbrance is released and after January 3, 2022, enter PR to encumber remaining balance for the rest of FY22.
4. Starting now and going through Fall, ask yourself if this is the final invoice for this Purchase Order for this calendar year. If Yes, mark as Final Pay.

*Note: Please review your open encumbrance report consistently to identify encumbrances/PO’s that need closed.

Blanket Orders (i.e.: multi-year, large dollar purchase orders)

- Update blanket purchase orders to what you have currently received in eVA Receiving.
- Mark the blanket PO as fully received by December 15th (or before).
- Contact Procurement and Contracts to manually release the encumbrance in Banner.
- After go-live on January 3rd, enter balance of the blanket order as a new PO in new platform. (NOTE: This will allow you to take advantage of the new blanket order functionality that better supports this business process and does not exist in eMall)

SUMMARY

1. Blanket PO’s must be closed by December 15th.
2. Receive invoices against Blanket PO’s up until December 15th, then mark received in eVA.
3. Procurement and Contracts will manually release encumbrance in Banner.
4. Once encumbrance is released and after January 3, 2022, enter PR to encumber remaining balance and establish remaining term in the new platform.

*Note: Please review your open encumbrance report consistently to identify encumbrances/PO’s that need closed.

Old Purchase Orders (i.e.: in place for a long time, waiting on a line item to be shipped)

- Update your purchase order to what you have currently received in eVA Receiving so the order is marked as fully received and will close out.
- Contact Procurement and Contracts to manually release encumbrance in Banner.
- If you still need the items remaining, after go-live, enter PR for item still needed in new platform to encumber budget. (“Print PO” so it does not go to vendor)
- Review all encumbrances to ensure they are properly closed in Banner.

*Note: Please review your open encumbrance report consistently to identify encumbrances/PO’s that need closed.

Change Orders through the Conversion

- If the invoice is less than the encumbrance or original PO, no change order is needed. Mark as Final Pay so encumbrance will be released in Banner.
- If invoice is greater than the encumbrance/original PO by $1,000 or more, a change order must be processed in eVA.