

## **eVA/Banner Finance Integration**

As part of a collaborative effort with five other Virginia institutions of higher education, George Mason has begun to implement a new process to integrate purchase transactions from eVA into Banner Finance. This effort is underway to facilitate compliance with Commonwealth of Virginia management standards for e-procurement. Our Purchasing Department has begun to pilot this program with purchases greater than \$2,000.

Some processing changes for purchases greater than \$2,000 will occur:

- Completed and signed Purchase Requisitions over \$2,000 will continue to be forwarded to the Purchasing Department for processing. Once entered in eVA, these Purchase Orders will now directly integrate with Banner Finance within minutes. This means faster processing and encumbering of funds.
- Purchase Requisition numbers will no longer exist in Banner. Instead users will query the eVA Purchase Order number in Banner Finance Self Service. Purchasing buyers will send an email to the requestor with the eVA Purchase Order number associated with the Purchase Requisition for tracking in Banner Finance Self Service.
- To query a Purchase Order in Banner Finance Self Service:
  1. Log-in to Patriot Web and select Financial Information
  2. Select View Document
  3. Select Purchase Order from the dropdown to the right of “Choose Type”
  4. Enter the eVA Purchase Order in the Document Number field. This eVA Purchase Order number will be provided in the buyer’s confirmation email. Although the eVA Purchase Order number will begin with “EP”, only the numbers following “EP” will be entered in the Document Number field.
  5. Select View Document at the bottom left of the screen.
- Alternatively, department requestors may drill on amounts in the Encumbrance column related to the applicable account code using a Budget Status by Account query.

During the week of October 22, 2007, EP numbers began to replace DO numbers for all non-credit card eVA orders including those less than \$2,000. The EP document replaces the DO document when faxing orders to vendors who do not accept electronic orders and will also serve as a receiving copy to annotate and send to Accounts Payable. An increase in processing time was also observed as orders moved from the composing to the approved status. eVA Quick

Guides, at [http://fiscal.gmu.edu/Resources/eVA/eVA\\_Resources.htm](http://fiscal.gmu.edu/Resources/eVA/eVA_Resources.htm), have been updated to reflect this change.

Credit card orders have not been impacted and continue to begin with PCO.

Note: If the Purchase Requisition was processed by the Purchasing Department prior to the integration changeover, department requestors may continue to select Purchase Requisition from the "Choose Type" dropdown and enter PR followed the Purchase Requisition Number in the Document Number field to view details about that transaction.

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