eVA's ~~April /~~ May 2018 Upgrade – V3

Updates to the Buyer Portal (a.k.a the Knowledge Center)

Updated 5/14/2018 – By: dds

For help and questions, please contact the JMU eVA Help Desk at askeva@jmu.edu or 568-4382.

Updates

All the updates in this document have been highlighted in yellow. The most notable being the upgrade date moving to May 19th rather than May 18th or May 4th.

Summary

What's changing? On Saturday, May 19th what we currently call the Buyer Portal / Knowledge Center will have a brand new look with new features. The buyer portal will have widgets to allow quick actions or show summary information quickly. In this initial upgrade, there will only be a few widgets, but over time, more will be added.

Before the Upgrade - *The Buyer Portal as of mid-April*

After the Upgrade - *The Buyer Portal starting* <mark>Saturday, May 19th</mark>
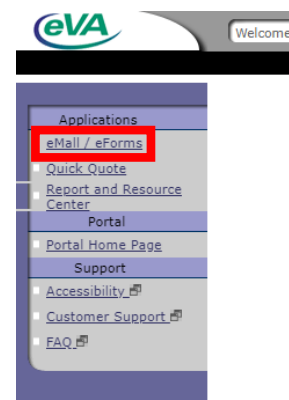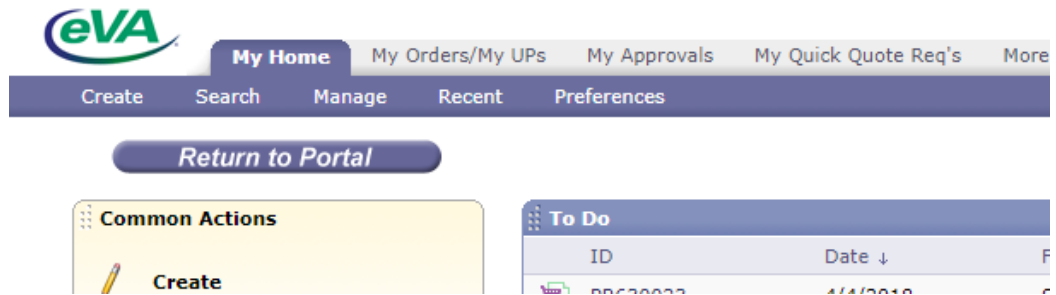

A.) I just want to access eMall / eForms to create, edit, and/or approve requisitions

Before the Upgrade

1. After logging-in to eVA you will be taken to the Buyer Portal
2. Click "eMall / eForms" on the left-hand side
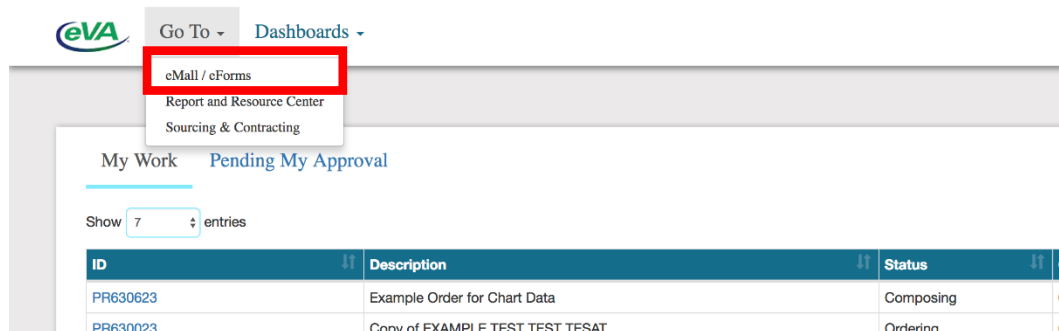
3. You will be taken into eMall / eForms.
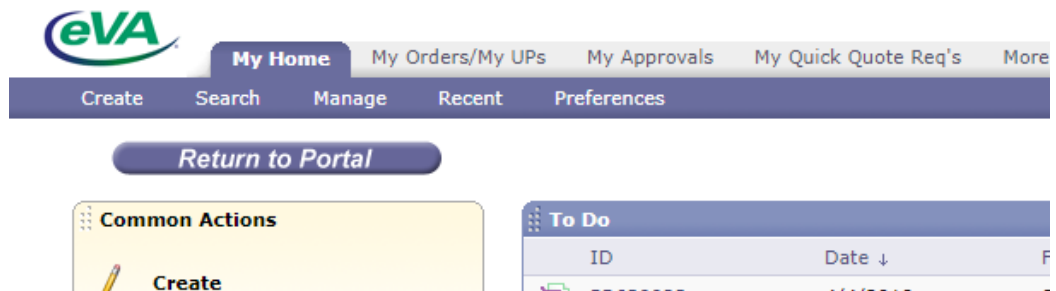

After the Upgrade

1. After logging-in to eVA you will be taken to the Buyer Portal
2. Click, "Go To" on the top left-hand side

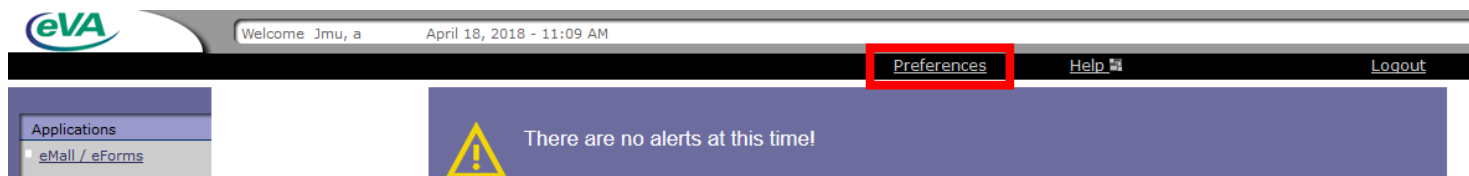3. In the Go To dropdown menu, you will click, "eMall / eForms"

4. You will be taken into eMall / eForms
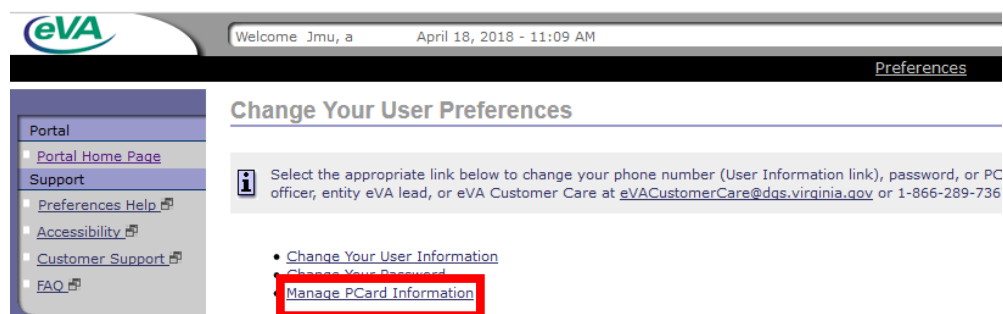   a. *Everything within eMall / eForms will work and look the same way as it does currently*

B.) I need to add, modify, or remove my SPCC (pcard)
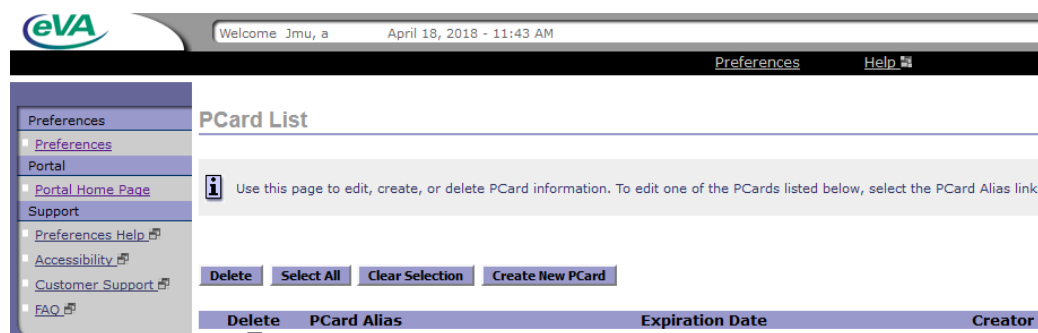
Before the Upgrade

1. After logging-in to eVA you will be taken to the Buyer Portal
2. Click, "Preferences" on the top center

3. On the User Preferences screen, you will click, "Manage PCard Information"

4. You will be taken to the PCard list menu were you can add, modify, or remove your SPCC
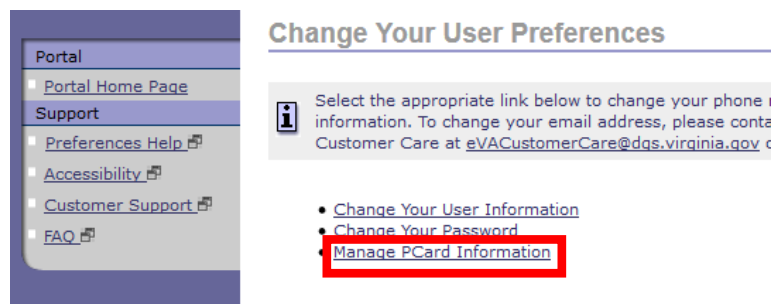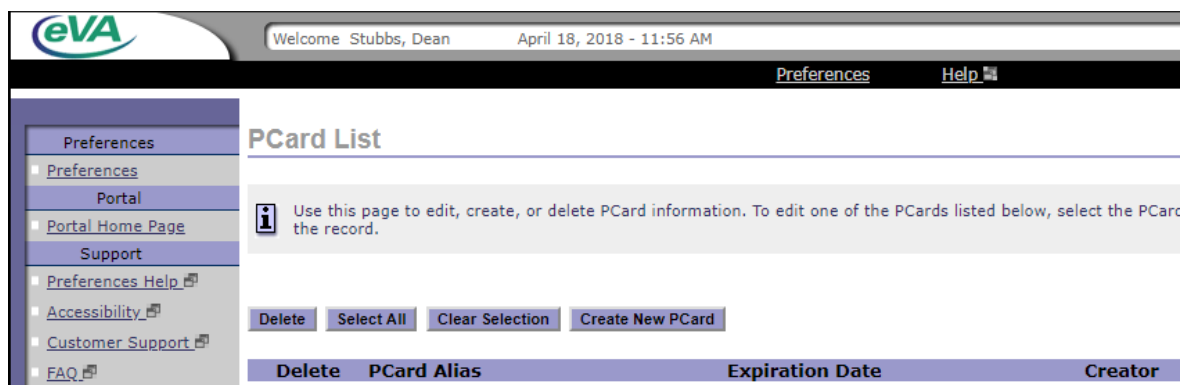

After the Upgrade

1. After logging-in to eVA you will be taken to the Buyer Portal
2. Click, "Preferences" on the top right-hand side

3. On the User Preferences screen, you will click, "Manage PCard Information"

4. You will be taken to the PCard list menu were you can add, modify, or remove your SPCC


C.) I want to learn more about the new Buyer Portal

Within the new buyer portal there will be two dashboards, *My Work* and *Knowledge Center.* Both of these dashboards will be brand new and have completely different content from the current buyer portal.

By default once you sign-in to eVA the Buyer Portal will display the *My Work* dashboard, but if you want to change what dashboard you are viewing, you would do the following:

1. Click, "Dashboards" on the top left-hand side
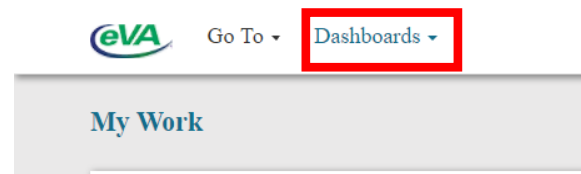
2. In the Dashboards dropdown menu, you will click, either "My Work" or "Knowledge Center"
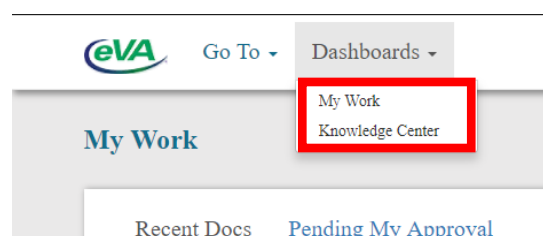
My Work

This dashboard will have three primary widgets, but over time, more will be added.

I. The first Widget is *Recent Docs & Pending My Approval.* This widget has two tabs both will show you slightly different things.

> The ==My Work== (*Recent Docs)* tab will show all requisitions you have created or ==modified in the last six months== and the status of those requisitions (composing, submitted, approved, or denied). If you click on the ID number of a requisition, you will be taken directly to that requisition in eMall / eForms.

> The *Pending My Approval* tab will show all requisitions that are waiting for you to approve. If you click on the ID number of a requisition, you will be taken directly to that requisition's approval summary menu in eMall / eForms.

II. The second Widget is *Entity Spend Summary.* This widget shows spend for the current fiscal year quarter and the three previous quarters. The data that feeds into this widget will be updated four times a day. *We have talked with eVA about modifying this to show spend at an individual user level and that functionality might be added in later.* You can click on "Small," or "Contract" to show more or less data in the graph.
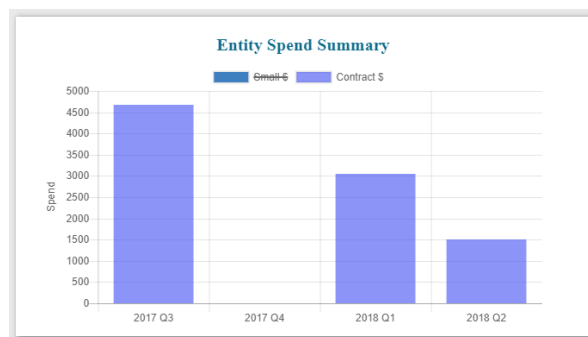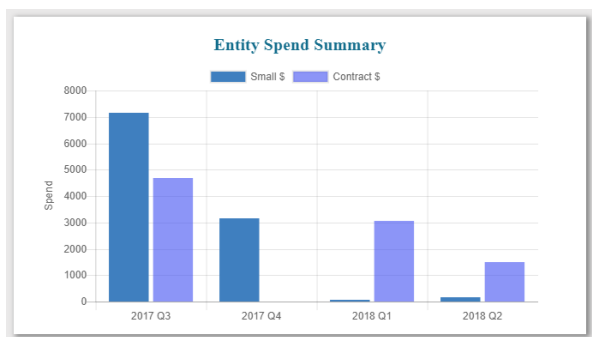
III.   The last Widget is ==My Work Summary== (*Document Summary).* This widget has three tabs but only the PRs tab will have any data for JMU eVA users. The PRs tab will show the number of requisitions in each status type (composing, submitted, ordered, and receiving) currently. The count for each will be for the last ==six months==.

My Work Summary

PRs	Solicitations	Contracts

Composing   1

Submitted   4

Ordered   0

Receiving   0

Knowledge Center

This dashboard will contain more general items such as guides, how-to videos, announcements, and links. We encourage JMU eVA users to make sure to consult with Procurement Services if there are any questions about the content on this dashboard as not all the information here will apply to JMU.

The Knowledge Center Dashboard as of May 14th