

EPIC eProcurement User Manual



Aurora Finance: EPIC eProcurement Guide

The information contained in this document is subject to change without notice.

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Information Disclaimer: Please note that the EPIC User Guide will be under regular revision throughout the EPIC rollout. For the most up to date manual revision, go to EPIC's *Training & Support link* (Left-hand side menu) at www.umanitoba.ca/eprocurement.

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eProcurement for University Business

EPIC is the University of Manitoba's eProcurement system which provides you with a single online format to facilitate the purchase of most goods and services. Fully integrated to the University's Financial system (BANNER), EPIC provides commitments of funds and the release of payments. EPIC is a web-based application which offers electronic catalogs with negotiated suppliers, electronic approvals on requests, real-time electronic ordering, receiving & invoicing and full visibility of transactions.

Most purchase and invoice transactions are processed in EPIC with the exception of:

- P-Card purchases
- Travel and Petty Cash
- Employee reimbursements
- Honorariums – Payments to Individuals
- Stipends
- Customs Brokerage fees
- Property Taxes & Government remittances
- Home-stay fees
- Moving and relocation (except contracted moving van services)

In 2012 the University moved towards eProcurement for the following benefits:

- Streamline procurement process on campus
 - Purchase online in one solution
 - Reduces the need to submit different types of forms
 - User friendly search of items and documents
- Real-time visibility of status of all purchases
- Electronic approvals
- Reduce costs – negotiated savings based on better data
- Reduce manual effort
- Environmentally friendly- less paper processing
- Automate electronic invoicing and payment
- Transparency of purchases, payments, and commitments
- Comprehensive reporting tools to improve budget & expenditure administration

For more information on Purchasing such as Policies and Procedures, visit the Purchasing web page under the Financial Services home page.

EPIC eProcurement Assistance

Assistance with the EPIC tool is available in the following options:

- **EPIC Online Training & Resources** – the Aurora Finance site has a webpage devoted to support with manuals, documents, Frequently Asked Questions (FAQ's), links and videos for use with the EPIC system.
www.umanitoba.ca/eprocurement
- **Aurora Finance Customer Service** provides help desk support with the EPIC system:
 - **Phone** 204-480-1001
 - **Email** epic@umanitoba.ca

Welcome to EPIC!

The Aurora Finance **EPIC** integrated eprocurement tool is expected to simplify the procurement process by providing users with a single online format for purchasing most goods and services. It will automate the ordering process from end to end, reduce the manual effort and time required to place an order, and provide the visibility needed to track orders and approvals.

Getting Access to EPIC

All University employees that require eprocurement access, will be asked to submit an EPIC Access Request Form located in the [EPIC forms section](#) of the Financial Services web page.

http://www.umanitoba.ca/admin/financial_services/secure/index.html

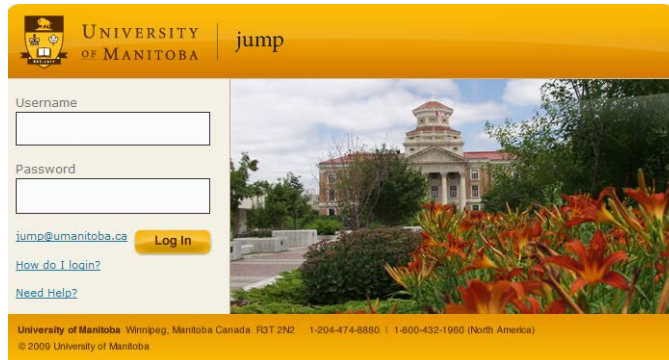
These forms will be provided to users in the rollout training that your department will receive.

These forms are processed by Aurora Finance Customer Service.

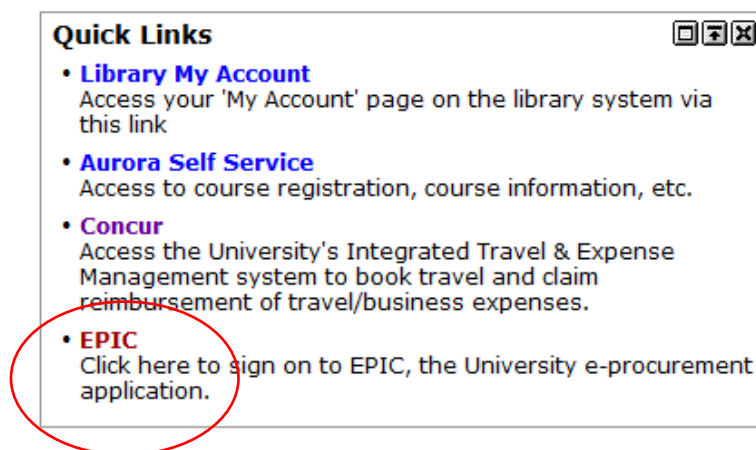
Module 1 : Application Orientation

Logging In

1. To access the login screen for EPIC; you will need to login to JUMP.



2. Once you have logged into **JUMP**, scroll down to the “**Quick Links**” section of your home page where you will find the link to access EPIC.



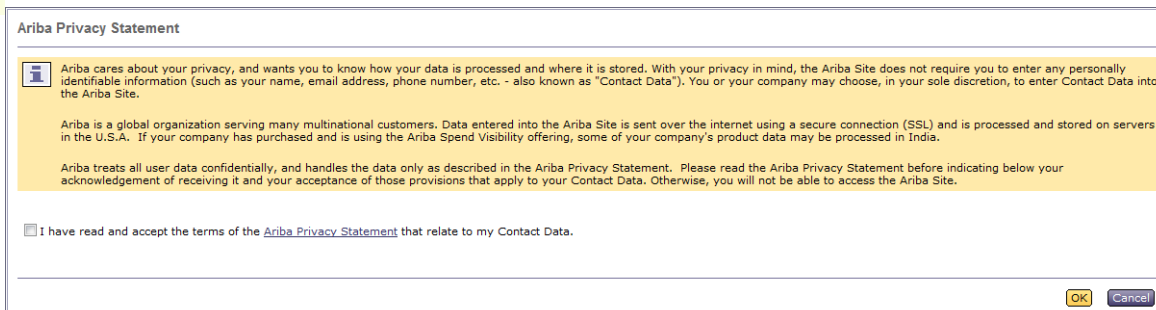
3. Once you have clicked “EPIC” you will be automatically routed and logged in to the EPIC system.

4. The Ariba Privacy Statement will be displayed for your first time logging in.

5. Review the statement, **click the check box** beside “I have read and accept terms of Ariba Privacy Statement that relate to my Contact data.”

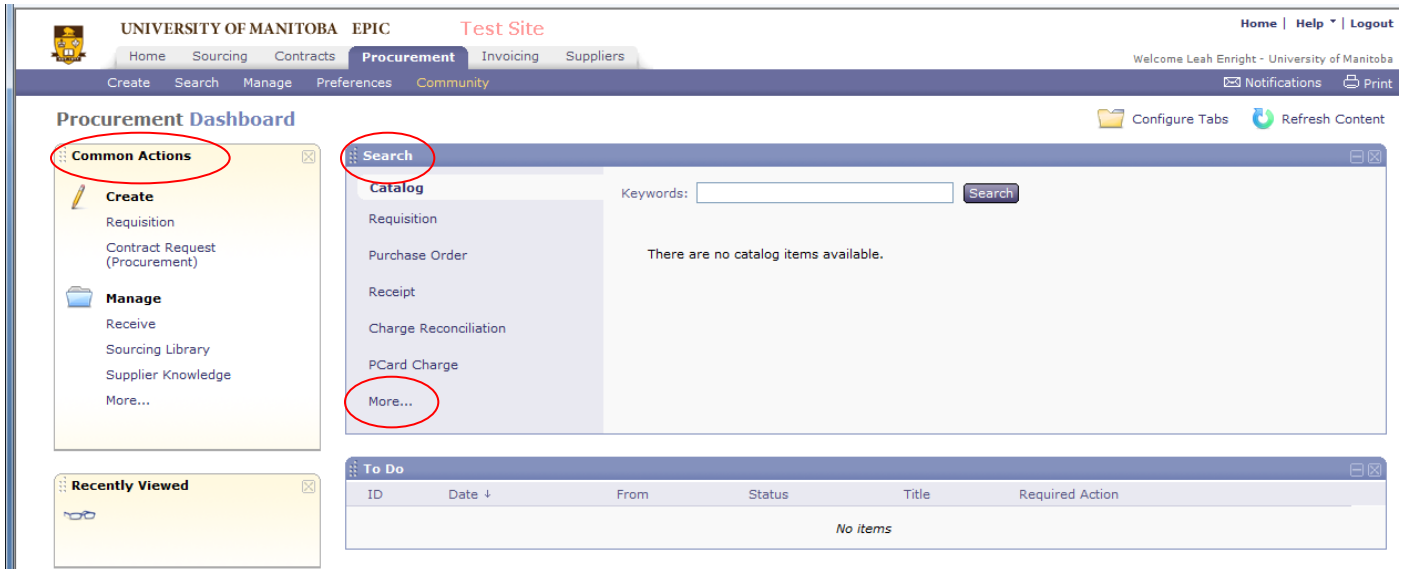


It is required to accept this agreement in order to proceed in using the system.



Dashboard Access Control & Navigation

After you log in, the Home Dashboard page is displayed. This page is the starting point for all actions and functionality you are authorized to access. For example, if you are only authorized to create invoices, you cannot also create purchase requisitions or contract requests.



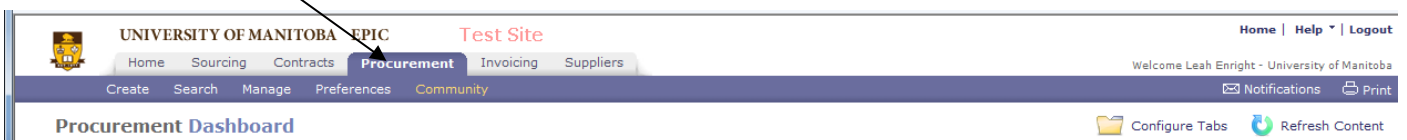
The screenshot shows the Procurement Dashboard interface. At the top, there are navigation tabs: Home, Sourcing, Contracts, **Procurement** (highlighted), Invoicing, and Suppliers. Below the tabs are sub-tabs: Create, Search, Manage, Preferences, and Community. The main content area is divided into several sections: 'Common Actions' (with a 'Create' sub-section containing 'Requisition' and 'Contract Request (Procurement)', and a 'Manage' sub-section containing 'Receive', 'Sourcing Library', 'Supplier Knowledge', and 'More...'), a 'Search' section with a 'Catalog' dropdown menu (showing 'Requisition', 'Purchase Order', 'Receipt', 'Charge Reconciliation', 'PCard Charge', and 'More...') and a search input field, and a 'To Do' table with columns for ID, Date, From, Status, Title, and Required Action. The 'To Do' table is currently empty, showing 'No items'.



Access is determined by your **group membership**, and you only see the functionality which you are authorized to use. Once training has been completed, each individual will have the ability to search catalogs, create requisitions, create contract requests, track the status of a request and view all related documents & actions including approval status, purchase orders, receipts, invoices, payments and more!

Dashboards:

The **highlighted tab** indicates which functional area you are currently working in.



This screenshot is similar to the previous one, but the 'Procurement' tab in the top navigation bar is highlighted in blue. An arrow from the 'Dashboards:' section points to this highlighted tab.



The links for Home, Help, and Logout are located on the top right hand corner of the Dashboard. *This Help link is generated by the software provider and is not intended for University of Manitoba EPIC users.*

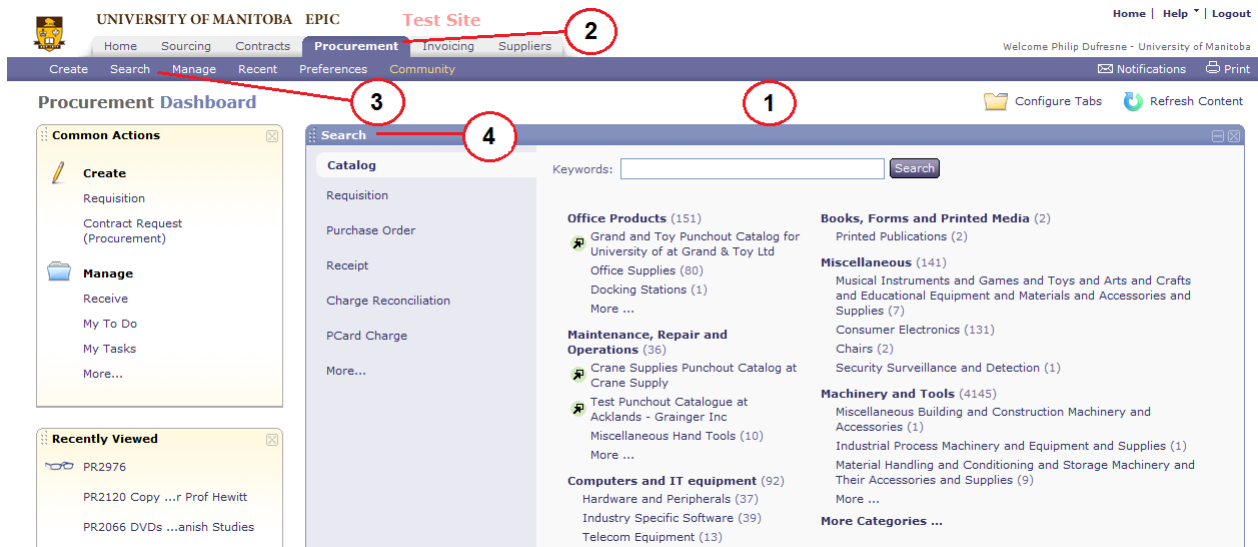
EPIC Help Desk support is offered by **Aurora Finance Customer Service at 480-1001.**



This screenshot shows the top right corner of the dashboard. The 'Home | Help | Logout' links are highlighted in blue. An arrow from the 'NOTE' section points to these links.

Each dashboard tab displays the following components:

1. Masthead - the white horizontal area on top of each page
2. Dashboard tabs
3. Command bar - the blue horizontal menu under the dashboard tabs
4. Content items, such as To Do, Search, and My Documents, display the content of a specific page.
5. Additional links to customize your dashboard tabs or refresh content on your page.



The home dashboard is customizable.

Dashboard Content Items

The dashboard pages include panels and content items. Some of the most important ones are listed below.

Common Actions: The “Common Actions” panel displays links to the most frequently used actions to create and manage documents and provides another way to access a particular function than using the Create or Manage links on the command bar.

To Do: The “To Do” content item lists the documents that require action from you. The list includes the documents that were assigned to you for review, approval, receiving or other actions. Click the document icon or the document title to open the document and act on them. The “View List...” link in the lower right corner provides access to all documents by document type or required action. Click any column header to sort the list by that column’s contents (for example, sort by Status). An arrow in the column header indicates the column by which you are sorting, and whether the sort is ascending or descending.

My Documents: The “My Documents” content item displays the 20 most recent documents you have created. Click the document icon or the document title to open the document to review and complete your document, if required. The “View List...” link in the lower right corner provides access to all documents by document type. Click any column header to sort the list by that column’s contents (for example, sort by Status). An arrow in the column header indicates the column by which you are sorting, and whether the sort is ascending or descending.

Recently Viewed: The “Recently Viewed” content item displays the five most recent documents you accessed either to review or to work on.


Search: The “Search” content item allows you to quickly search catalogs, various documents such as requisitions, Purchase Orders or invoices and access saved searches. The search panel on the left side of the content item displays the most common document types that you may be interested in based on the functional area you are working in. Click “More...” to choose other document types to search for.

Dashboard Display Options

The table contents within the dashboard have display options including scroll bars, minimize and maximize buttons, and pagination controls which allows for expanding, collapsing, hiding, and showing details.

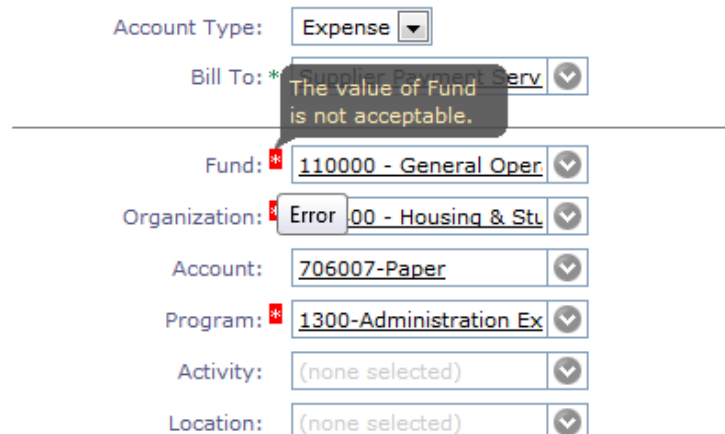
Dashboard Content Refresh

The “To Do” content items are refreshed every 15 minutes to display new documents or updates to documents. If a user submits a document that requires your approval, and you are already logged in, the document is not displayed until the next refresh happens unless you manually refresh your content.

Documents that you have created and are working on are displayed immediately in your “My Documents” content item when you save or submit them. However, status changes to your documents are reflected only with the next automatic content refresh or when unless you manually refresh your content. To manually refresh your content, click the refresh button at the top of your web browser. 

Errors and Warnings

Warnings and error messages appear when required information is omitted or invalid values are entered. Warnings can be informational and do not always require any action on your part. Errors are displayed with a red asterisk and require you to take an action. Read the message and follow the suggestions to correct the problem. Note that the actual error may not be on the page that is currently displayed and will inform you which page or line needs to be corrected



The screenshot shows a form with several dropdown menus. The 'Fund' field has a red asterisk and a tooltip that says 'The value of Fund is not acceptable.' The 'Organization' field also has a red asterisk. The 'Bill To' field has a tooltip that says 'The value of Fund is not acceptable.'

Account Type: Expense

Bill To: * The value of Fund is not acceptable.

Fund: * 110000 - General Oper

Organization: * Error 00 - Housing & Stu

Account: 706007-Paper

Program: * 1300-Administration Ex

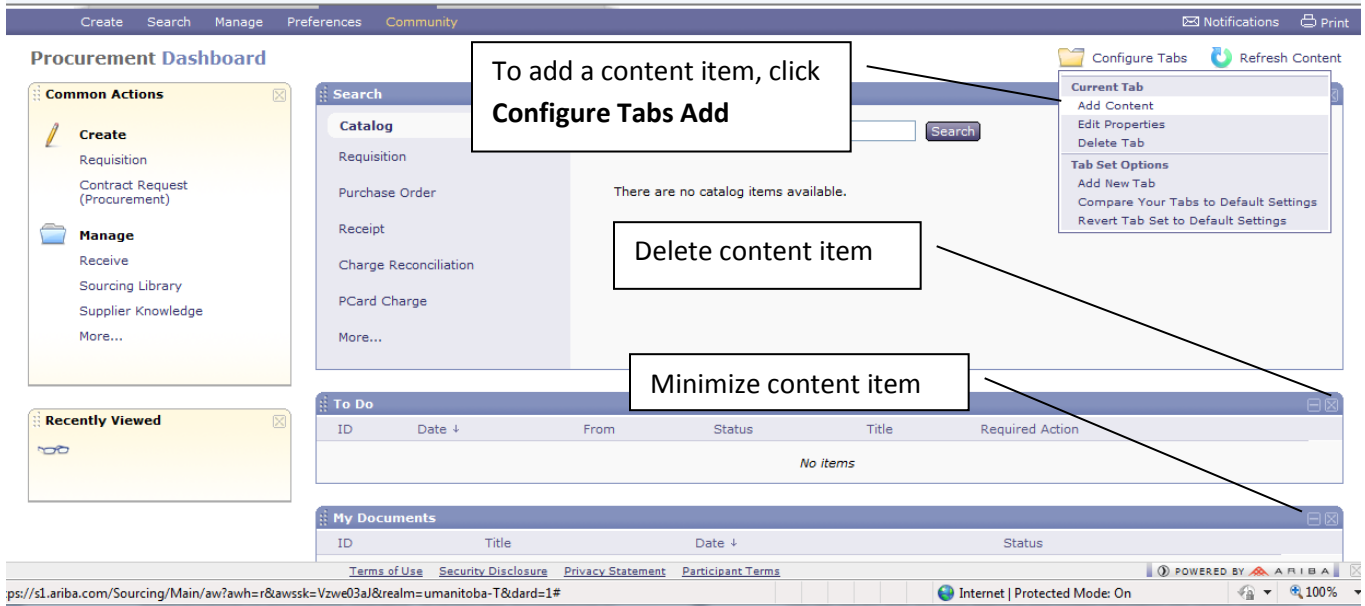
Activity: (none selected)

Location: (none selected)

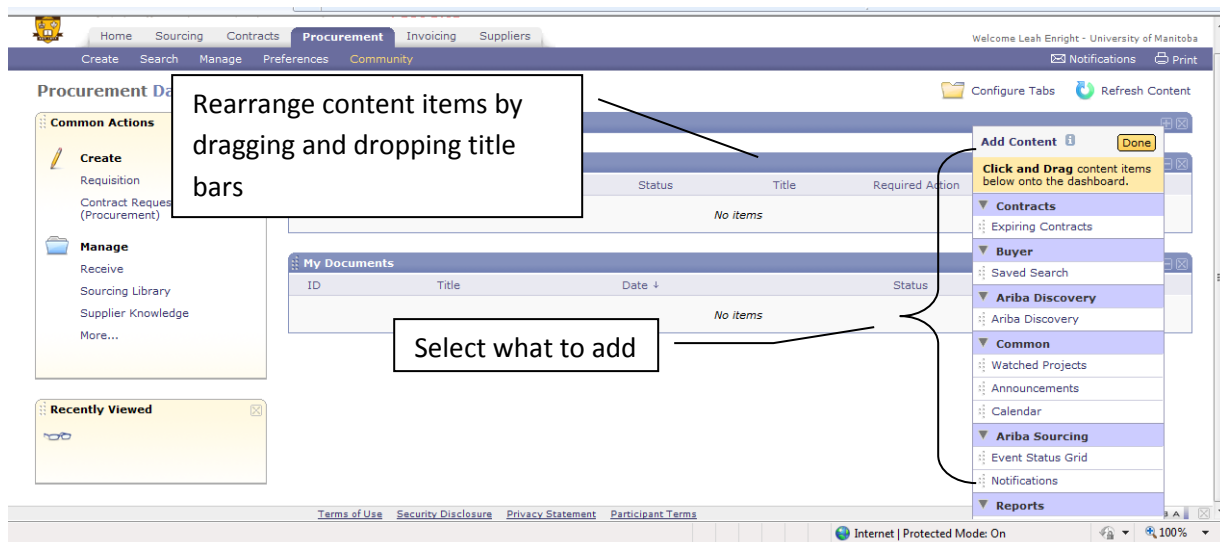
Dashboard Customizations

The dashboards are configured by the EPIC administrator. However, you can easily customize your dashboards to display only the content items you are interested in, minimize or maximize their display, or move them to different parts on the page.

You can also use the Configure tabs link in the upper right corner. After clicking that button, you can manage tab content.



You can use the drag and drop feature to plot content information into various dashboard locations to suit your needs.



If you change your dashboard from the default template, you can “Compare your Dashboard” to the template to ensure you have not missed desired content or “Revert to the Original” if you want to return to the default dashboard view.

User Preferences

You are able to modify some of the content in your user profile and preference settings. Options are listed under the preferences option.



Changing Your Profile

Your profile contains information such as your email address, your group memberships, and your default accounting and shipping information.

A screenshot of the 'User Profile' page for Philip Dufresne. The page has a sidebar with navigation options: Personal Profile, Personal Info, Account/Ship, Justify Changes, Approval Flow, Review Changes, and Review Changes. The 'Account/Ship' section is selected and highlighted. The main content area shows two sections: '1. Change your accounting information:' and '2. Change your shipping and delivery information:'. The first section contains dropdown menus for Fund (11000 - General Oper), Organization (571300 - Purchasing), Account (none selected), Program (1300-Administration Ex), Location (none selected), and Purchasing Unit (umanitoba). The second section contains dropdown menus for Ship To (Comptrollers Office) and a text field for Deliver To (Philip Dufresne). At the bottom, there is a disclaimer: 'You expressly agree and understand that your data entered into this system may be transferred outside of the European Union or other jurisdiction where you are located, as further described in the Arriba Privacy Statement. Privacy Statement'. Navigation buttons for Prev, Next, and Exit are visible at the top and bottom of the form.

1. Personal Info Profile information is set at the time your access is given and cannot be changed. If the information is incorrect contact Aurora Finance Customer Service at 204-480-1001
2. Account/Ship information which displays the default FOP information and will be used in each requisition. The Ship To code can also be searched by "Street" to search codes for your specific building. This FOP will be defaulted into the requisition fields and will be charged unless changed manually. These default FOP's can also be changed.

The remaining Personal Profile options can be reviewed but do not require any changes by the user.

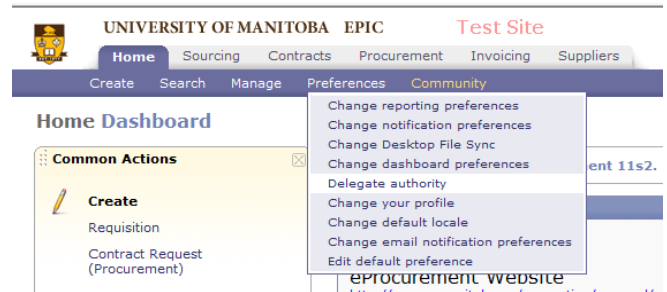
Delegating Authority

In EPIC you can delegate your user rights to another individual in the event you will be away (i.e. conference, vacation etc.) This allows the delegated individual to easily track your requests for approvals, receiving, invoices/payments etc. in your absence..

Complete the following steps to delegate your authority:

Adding a Delegate

1. Select **Preferences Menu** from Homepage
2. Select **Delegate Authority** option from menu
 - Delegate Authority form is displayed



3. Click drop down arrow beside “Delagatee” box

A screenshot of the 'Delegate Authority' form in the EPIC system. The form is titled 'UP92: Leah Enright (rose33)'. It features a left-hand sidebar with three steps: '1 Delegate', '2 Approval Flow', and '3 Review Changes'. The main form area contains the following fields: 'Delegatee: *' (a dropdown menu), 'Delegation Start Date: *' (a date picker), 'Delegation End Date: *' (a date picker), and 'Delegation Reason: *' (a text area). At the bottom, there is a 'Notification:' section with a checkbox labeled 'Continue to notify me by email of approval requests'.

4. Select **Search for More**
 - Search box is displayed
 - Type in the name of the person you wish to delegate to i.e. Kristine Ward

A close-up screenshot of the 'Delegatee: *' search box. The search box contains the text 'Search for more...' and a search icon. A dropdown arrow is visible to the right of the search box.

5. Click **Search**

- Options are displayed
- Click **Select** beside appropriate name

Choose Value for Delegatee

Found more than 500 items. Only the first 500 items are displayed.

Field: Name Kristine Ward Search

Name ↑	PasswordAdapter	
Zafar Javed	Enterprise User	Select
(no value)		Select
A. Booth	Enterprise User	Select
Aaron Beddome	Enterprise User	Select
Aaron Boila	Enterprise User	Select
Aaron Chan	Enterprise User	Select

Done

Choose Value for Delegatee

Field: Name Kristine Ward Search

Name ↑	PasswordAdapter	
(no value)		Select
Kristine Ward (Test)	Enterprise User	Select

Done

- Define **Delegation Start date**
- Click calendar to select date start date for delegation to come into effect
- Choose appropriate times
- Define **Delegation End date** – click calendar to select end date
- Change time to end time of your choice

UNIVERSITY OF MANITOBA EPIC Test Site

Home Sourcing Contracts Procurement Invoicing **User Profile** More...

Create Search Manage Preferences Community

UP93: Leah Enright (rose33)

Delegate Authority

- 1 Delegate
- 2 Approval Flow
- 3 Review Changes

Delegatee: * [Kristine Ward \(Test\)](#)

Delegation Start Date: * [Calendar Icon] [] [Clock Icon]

Delegation End Date: * [Calendar Icon] [] [Clock Icon]

Delegation Reason: [Text Area]

Notification: Continue to notify me by email of approval requests

7. Enter **Delegation Reason** : For Example: “ Going on Vacation”

UNIVERSITY OF MANITOBA EPIC Test Site

Home Sourcing Contracts Procurement Invoicing User Profile More...

Create Search Manage Preferences Community

UP93: Leah Enright (rose33)

Delegate Authority

1 Delegate

2 Approval Flow

3 Review Changes

Delegatee: * Kristine Ward (Test)

Delegation Start Date: * 8/6/2012 8:00 AM

Delegation End Date: * 8/27/2012 8:00 AM

Delegation Reason: Going on vacation

Notification: Continue to notify me by email of approval requests



Notification check box: while delegating authority you can continue to receive notifications of requests requiring your approval

8. Click **Next**

Add approver

- If your unit determines that delegation requires approval from within your unit, the appropriate individuals can be added at this stage

9. Click **Next**

- Review Changes

UNIVERSITY OF MANITOBA EPIC Test Site

Home Sourcing Contracts Procurement Invoicing User Profile More...

Welcome Leah Enright (rose33) - University of Manitoba

UP93: Leah Enright (rose33)

Review your request and then submit it for approval.

Change	From	To
Delegatee	(no value)	Kristine Ward (Test)
Delegation Start Date		8/6/2012
Delegation End Date		8/27/2012
Delegation Reason		Going on vacation

Prev Submit Exit

10. Click **Submit**



- Profile changes have been submitted
- Click Return to the EPIC Home Page

11. The next time the user who has been granted access to delegate logs in, the following prompt will appear. The option to login as yourself or the delegatee is shown.



UNIVERSITY OF MANITOBA EPIC

Act as User

You have the permission to act as the users listed below. You can log in as yourself or as the other user.

Log in as:

- [Renita Peters](#) - 0 requests require action
- [Philip Dufresne](#) - 0 requests require action

Reviewing/Removing a Delegate

12. Locate the Logout button in the upper right hand corner of the Homepage

13. Click **Logout**

Home | Help ▾ | Logout

14. Using the same user ID and password provided log into EPIC

15. Active Delegation Screen is displayed upon log in

16. Click **Stop** using the delegation of authority

Active Delegation of Authority

You have logged in while a delegation on your behalf is still in effect. You can continue or cancel the delegation.

Kristine Ward has delegated your authority to **Kristine Ward**, from 6/4/2012 12:00 AM to 6/25/2012 11:59 PM.

What would you like to do?

- [Continue](#) using the delegation of authority
- [Stop](#) using the delegation of authority

- Delegation has been removed
- You are logged into EPIC and brought to the Homepage

Adding Approvers

Approvers can be added into the Approval Flow. For example, if you are the requisition preparer, you may want another user to be made aware of your request. In this case, you add that user as a watcher. If you are a requisition approver, you may not want to approve or deny the document by yourself, so you add someone else as an approver. For example, if a requisition contains items about which you have insufficient knowledge, you may want to add an approver who is more familiar with them.

Adding an Approver

1. Select **Preferences Menu** from Homepage
2. Select **Change your profile** option from menu
 - Personal Profile Information is displayed
3. Click **4. Approval Flow** from the Left-hand side menu
4. Select **Add Initial Approver** then select the arrow to select the approver or to search for the desired approver.
5. Select **Next**. Review changes will be displayed. Select **Submit**.

Similarly, you can add approvers for a single claim by editing the approval flow under the approval flow tab for a specific requisition.

Adding Multiple Approvers

In addition to adding individual approvers to the approval graph, you can add an approval node with a list of users or group.

To add an approval node:

1. Click a triangle and select **Add Serial Approver** or **Add Parallel Approver**.
2. In the Add Approval Request dialog box, click the drop-down arrow and select "**Search for more**."
3. Search for the users or groups you wish to include in the group.
4. Click the **checkboxes** next to the users or groups. Any users or groups you have checked will be added to the list of selected approvers.
5. When you are finished adding approvers, click **Done**.
6. Click **OK**. The selected users and groups are grouped together and added to the approval flow in one node.

Moving an Approver

You can move or remove approvers that you added, but not before approvers that have already approved or denied. You can move approvers to a position adjacent to active or pending approvers only. Only authorized users can move approvers included in the default approval flow.

To move approvers, click a triangle, then select Move Approver and click any of the displayed checkboxes to move the node.

Deleting an Approver

You can delete only nodes that have a delete button, which depends on your role in the organization and how the node was added.

You can delete approvers that you have manually added. Approvers added by the system can be deleted only if you have the specific permission. The permission is set for each approvable type in the system and is typically limited to a few individuals.

To remove approvers, click the X next to the approval name or group.

Changing Email Notification

EPIC uses email notifications to advise users when different approvals are required. Some messages can be managed by each individual to define how they receive their notifications. This includes signing authority approvals.

There are 3 options that can be set by a user:

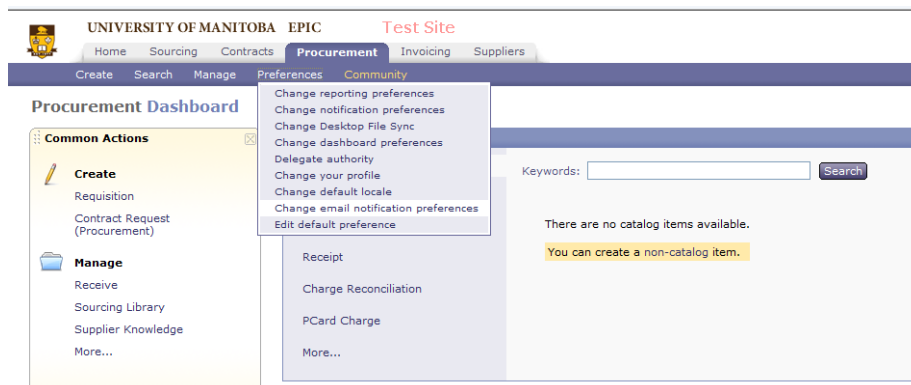
- 1) Email immediately** – each individual request will be sent to your email inbox for you to review. You can approve/deny the request from the email
- 2) Send a summary email** – a summary of all requests will be sent to your email inbox which require your review once a day. You would be required to log into EPIC to approve or deny requests when you select a summary notification.
- 3) No notification** – this selection will not provide any electronic notification that there are approvals pending your review. If this option is selected and you are expected to approve any requests you would be required to log into the system and review the pending approvals in your To Do List.



If you choose option **#3 No notification**, make sure to schedule daily or weekly calendar reminders to log into EPIC to review you pending approvals regularly.

You can change your email notification by performing the following steps:

1. Select **Preferences Menu**
 - Observe drop down selection criteria displayed
2. Choose **Change Email Notification Preferences**



- Email Notification Preferences selection will display

- Click arrow beside **Edit Preferences for:** field to view drop down selection

UNIVERSITY OF MANITOBA EPIC Test Site

Home | Help | Logout

Welcome Leah Enright (rose33) - University of Manitoba

Home Sourcing Contracts Procurement Invoicing Suppliers

Create Search Manage Preferences Community

Edit Email Notification Preferences

For each document type listed, specify the types of email notification messages to receive and how often you want to receive them. The option **Other document types** sets preferences for document ...

Edit preferences for: []

No preference currently selected.

Cancel

- Select **Requisition**
- Requisition email notification preferences are displayed

UNIVERSITY OF MANITOBA EPIC Test Site

Home Sourcing Contracts Procurement Invoicing Suppliers

Create Search Manage Preferences Community

Edit Email Notification Preferences

For each document type listed, specify the types of email notification messages to receive and

Edit preferences for: Requisition

Notification method

- Other document types
- Requisition
- Contractor Survey
- Time Sheet
- Contractor Expense Sheet
- Supplier Data Update
- Expense Report
- Travel Authorization

When I am an approve []

When I am a watche []

Notification frequency

Each time my document []

When my docu []

When I need t []

When my approval is overdue: Send once

When I am a watcher: Send once

Send email

Send email

Send once

Send once

3. Change Notifications

- Click the arrow on the field labelled **When I am a watcher** to display drop down selection
- Select your choice (**Email immediately, Send email summary**)

Edit preferences for: Requisition

Notification method

When I am an approver: Send email immediately

When I am a watcher: Send email immediately

Notification frequency

Send email immediately

Send email summary

- Change notifications for when your approval is overdue to Send Repeatedly

Notification frequency

Each time my document is approved or denied: Send email

When my document is fully approved: Send email

When I need to approve a document: Send once

When my approval is overdue: Send once

When I am a watcher: Send repeatedly

- Click **Save**
- You are returned to Home page

4. Remove Notifications

- Leave both When I am an approver, and When I am a watcher field options as **Send email immediately**
- Ensure both checkboxes with the Send email options are **unchecked**
- Beginning with When I need to approve a document, select **Never Send** for all three of the drop down menus at the bottom of the page
- The notification frequency settings should appear like the screenshot below

Notification frequency

Each time my document is approved: Send email

When my document is fully approved: Send email

When I need to approve a document: Never send

When my approval is overdue: Never send

When I am a watcher: Never send

Save Cancel

- Click **Save**
- You are returned to Home page



How to check out your changes:

1. Select **Preferences Menu**
 - Select **Change Email Notification Preferences**
 - Select **Requisition** from drop down box
 - Observe Preferences have been changed for your profile
 - Click **Cancel**

Module 2: Using Catalogs

Catalog Introduction

Catalogs provide you with a variety of goods or services that are regularly ordered at the University with suppliers who have negotiated agreements. Many of the existing system contracts and preferred suppliers have catalogs within EPIC plus additional catalogs have been added to offer more content for you. All catalogs are searchable, contain University specific pricing and provide an easy to use ordering process. There are two types of catalogs available in EPIC: **Local Catalogs** and **PunchOut Catalogs**.

There are some differences between Local and PunchOut catalogs:

Local Catalogs

Catalogs that are loaded directly into EPIC are called Local catalogs and can contain various items. When searching for items, Local catalog items will display directly in EPIC and provide a product description, product codes, price, expected delivery time and if available a picture of the product.

Local catalogs are identified as the best option for a supplier when:

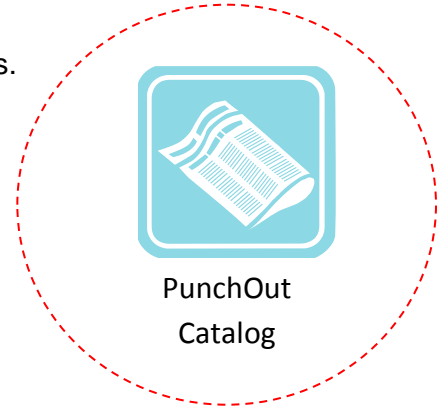
1. Products require minimal configurations.
2. Total inventory is less than 1000 items.
3. Supplier provides consistent or negotiated pricing.

PunchOut Catalogs

PunchOut catalogs are hosted on the supplier's own website, where you may select items for purchase.

The buying experience with internet catalogs differs from buying from local catalogs. PunchOut catalogs are selected for the suppliers that have:

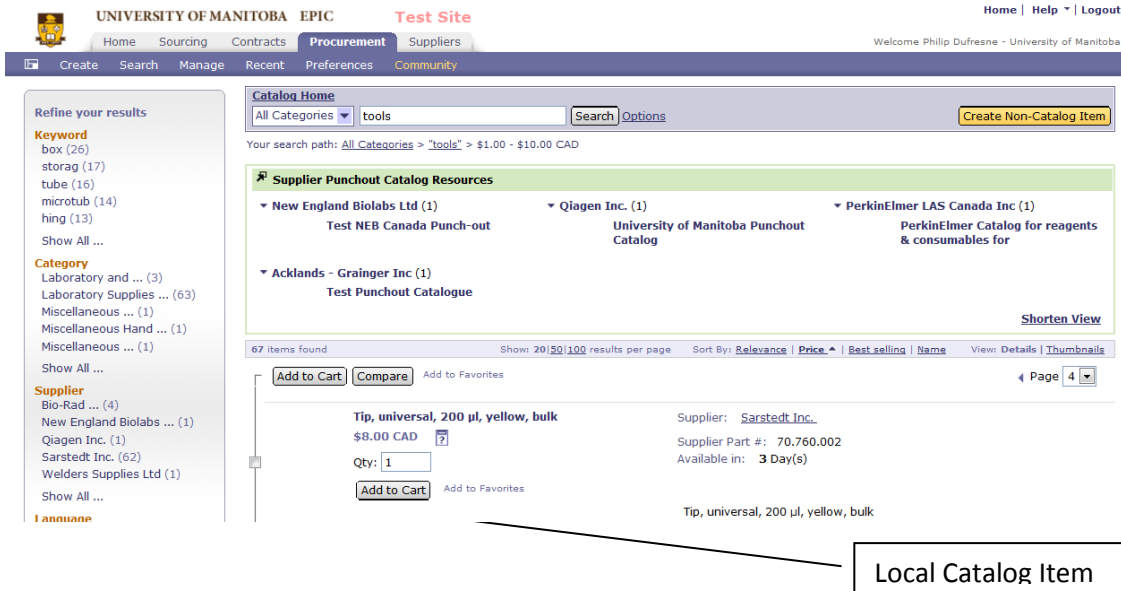
1. Products with a large number of configurations and options.
2. Inventories containing more than a few thousand items.
3. Customized products.
4. Product specifications or prices change often.
5. Technical ability to provide web ordering with a search engine available on their website.



A PunchOut Catalog is a supplier web-site which you can connect to from within EPIC. These catalogs are accessed from the Catalog search screen within EPIC and generally provide more information on the available products. A PunchOut catalog appears as a link to the suppliers catalog when items are searched in EPIC; this hyper-link takes you to the actual supplier Website where you can search and select products without ever leaving EPIC.

Local vs. Punchout

The following screenshot depicts a PunchOut catalog vs. a local catalog through EPIC.



The screenshot shows the EPIC Procurement interface. The search results are categorized into 'Supplier Punchout Catalog Resources' and 'Local Catalog Item'. The 'Local Catalog Item' is a 'Tip, universal, 200 µl, yellow, bulk' with a price of \$8.00 CAD and a quantity of 1. The 'Supplier Punchout Catalog Resources' section lists several suppliers and their catalogs, including New England Biolabs Ltd, Qiagen Inc., PerkinElmer LAS Canada Inc, and Acklands - Grainger Inc.

Accessing the Catalog

EPIC catalogs can be accessed in two ways:

1. Creating a requisition through the **Create** menu.
2. Selecting Catalog from the **Search** menu.

The screenshot displays the EPIC Procurement system interface. At the top, the header includes 'UNIVERSITY OF MANITOBA EPIC Test Site' and navigation links for 'Home', 'Sourcing', 'Contracts', 'Procurement', 'Invoicing', and 'Suppliers'. A user welcome message 'Welcome Leah Enright (rose33) - University of Manitoba' is visible on the right. The main navigation bar contains 'Create', 'Search', 'Manage', 'Preferences', and 'Community'. The 'Create' menu is open, showing options like 'Catalog', 'Charge Reconciliation', 'PCard Charge', 'Purchase Order', 'Receipt', and 'Requisition'. The 'Search' menu is also open, showing 'Catalog' as the selected option. The main content area displays a search interface with a 'Keywords:' input field and a 'Search' button. Below the search bar, there are several category listings: 'Office Products (263)', 'Maintenance, Repair and Operations (54)', 'Computers and IT equipment (219)', 'Books, Forms and Printed Media', 'Miscellaneous (2)', 'Machinery and Tools (4157)', and 'Raw Materials (294)'. Each category has a list of items and their counts.

Catalog Hierarchy

The catalog is presented as a hierarchical tree of product categories. The catalog tree combines products provided by multiple suppliers.

The screenshot shows a search interface with a left-hand navigation menu and a main content area. The left menu includes 'Catalog', 'Requisition', 'Purchase Order', 'Receipt', 'Charge Reconciliation', 'PCard Charge', and 'More...'. The main content area has a search bar and a list of categories with their respective item counts. Callouts point to 'Categories' and 'Subcategories'.

Category	Item Count
Office Products	263
Maintenance, Repair and Operations	54
Computers and IT equipment	219
Services	18
Books, Forms and Printed Media	1
Miscellaneous	2
Machinery and Tools	4157
Raw Materials	294

The branches of the tree can be expanded by clicking the links at the top of the screen. The contents in the catalog are presented in a similar fashion to the contents of Internet shopping sites. The search bar is also available for searching various products and services. After performing a search, the following page will be displayed.

The screenshot shows a search results page for 'oxygen'. The search path is 'All Categories > "oxygen"'. The results are displayed in a table with columns for product name, price, quantity, and supplier. Callouts point to the 'Catalog Tree' on the left and 'Line Items' in the main content area.

Product Name	Price	Quantity	Supplier
OXYGEN, COMPRESSED CLASS 2.2(5.1)	\$0.00 CAD	1	Medigas Manitoba Ltd.
OXYGEN, COMPRESSED GAS CLASS 2.2 (5.1) 6.90M3 ...	\$15.51 CAD	1	Welders Supplies Ltd.

The categories are the groups or classes that have been created to classify the content of the catalog and display based on your search criteria.

Line Items

The catalog line items are the basic elements of a catalog, making up the entire collection. Catalog line items are the goods or services you look for when browsing a catalog.

The screenshot shows a catalog entry for 'PROTEAN II,2D SYST,1.5MM,20CM' priced at '\$2,705.00 CAD'. The quantity is set to '1'. The supplier is 'Bio-Rad Laboratories Canada Ltd.' with a part number of '1651934' and an arrival time of '6 Day(s)'. The item description is '2-D gel electrophoresis cell for tube or slab gels, 1.5 mm, 20 cm, includes glass plates, casting stand, clamps, 24 glass tubes, 2 tube gel adaptors'. Callout boxes identify the following elements:

- 6. Pricing: Points to the price '\$2,705.00 CAD'.
- 2. Quantity: Points to the 'Qty: 1' input field.
- 3. Currency: Points to the 'CAD' currency code.
- 4. Supplier: Points to the 'Supplier: Bio-Rad Laboratories Canada Ltd.' text.
- 5. Supplier Part ID: Points to the 'Supplier Part #: 1651934' text.
- 1. Item Description: Points to the detailed description of the 2-D gel electrophoresis cell.
- 7. Expected Time of Arrival: Points to the 'Available in: 6 Day(s)' text.

The following list shows the main content of a catalog item in EPIC:

1. Product Description
2. Quantity
3. Currency
4. Supplier
5. Supplier Part ID
6. Pricing
7. Expected Time of Arrival (ETA)
8. Commodity Codes – *not shown at this stage but auto populates in request*
9. Units of Measure - *not shown at this stage but auto populates in request*

Product Details

In EPIC you can explore items by clicking through the category and subcategory links.

You will find items at the lowest level of a category. Additional information is available by selecting the link provided on the product name.


The screenshot shows a product listing for 'PROTEAN II,2D SYST,1.5MM,20CM' priced at \$2,705.00 CAD. A red circle highlights the product name and price, with an arrow pointing to a detailed information sheet below. The information sheet includes the following details:

PROTEAN II,2D SYST,1.5MM,20CM		\$2,705.00 CAD /each
Price:	\$2,705.00 CAD	
Product Description:	2-D gel electrophoresis cell for tube or slab gels, 1.5 mm, 20 cm, includes glass plates, casting stand, clamps, 24 glass tubes, 2 tube gel adaptors	
Supplier:	Bio-Rad Laboratories Canada Ltd.	
Supplier Part #:	1651934	
Manufacturer:	Bio-Rad Laboratories, Life Science Group	
Manufacturer Part #:	1651934	
Available in:	6 Day(s)	
Information from Supplier:	http://www.discover.bio-rad.com	
Information from Manufacturer:	http://www.discover.bio-rad.com	

The Product Details typically provide the following information about the product:

1. Product name and a summarized description
2. Supplier name and possibly a link to supplier's detail
3. Supplier part number
4. Manufacturer name
5. Manufacturer part number
6. Expected time of arrival (ETA)
7. Optional: Link to manufacturer or supplier Website

Product Details

Information tabs are sometimes available next to the price of an item. Click the  icon and an information sheet or a supplier's website will become available for you to collect further details. **NOTE:** If a supplier's website opens from an Information tab it is not a PunchOut catalog, you must return to EPIC to order the items.

Commodity Codes

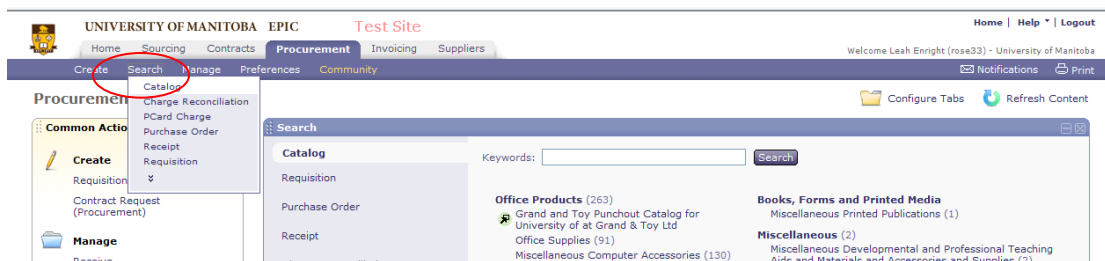
Commodity codes are product or service classification codes, used to group related products together into categories. Each product or service in the catalog must have a commodity code. In EPIC we are using UNSPSC (United Nations Standard Products and Services Codes). These codes provide a description of what is being purchased and are required on every item on a requisition to assist in the accuracy of your request and provide robust reporting options.

When entering a commodity code, ensure to be as specific as possible. If you are entering a commodity code for a power drill, ensure to use the “Power drills” commodity code. If your specific item doesn’t appear, try revising your search to “drill” instead of “power drill” to see more results. If your desired code still doesn’t appear, try generalizing your search (eg. Power tool).

How to Search Catalogs

Perform the following steps:

1. Click ‘**Search**’ on dashboard
 - Select & Click **Catalog** from the drop down menu.



- Search form is displayed as pictured below. The search tool on the EPIC home page is also available by selecting “Catalog” as your type of search.



Type the name of the item you are searching for in the **Keywords Box**. (For example: **Oxygen**)



3. By default the catalog search is by Keyword, additional options of supplier or manufacturer part numbers are also available. To add these options to your search criteria, click the Options link and select the searches you would like to include.

Catalog Home

All Categories Search **Options**

Supplier Part #:

Manufacturer Part #:

Additional

- Supplier Part #
- Manufacturer Part #

Saved searches

- Save current search...

Mis

Keyword Search

To search for an exact phrase, use quotation marks around the search terms. For example, if you search for “VGA cable” the search will only return results with the exact phrase “VGA cable.”

Keyword searches default to AND searches. That means that all terms must match an item for that item to be returned. For example, if you search for VGA cable the search will run as “VGA” AND “cable”. You can also include the OR keyword; VGA or cable will return results with “VGA” or “cable.” To exclude words from a search, use a leading dash character: cable - VGA will return results matching “cable” without “VGA.”

Stem Search

This type of search is used with supplier part numbers. You can enter a part number stem to search for all items whose supplier part numbers begin with the stem. For example, enter BTM0 to find supplier parts in the same sequence, such as “BTM00057, BTM00060, BTM00106, BTM00107.”

Search Functionality

For part number searches only letters and numbers are significant. All other characters and white space are ignored. For example, if the part number is: 343-555, the matches are: 345-555, 343555, 343 555, 3-43&^%5-55.

Part number searching performs wildcarding automatically, provided at least three alphanumeric characters of the part number are included. For example, if the part number is: 343-555, the matches are: 343-555, 343, 43-55, 4355, 3555.

To find a single part number and only that part number, put the part number in quotes. If the part number is 123-456 searching for "123-456" will retrieve only 123-456 and not the variations mentioned above.

- Once you have entered your search criteria, **click Search** or **Press Enter** on your keyboard
- Observe displayed results for the Keyword oxygen

The screenshot shows the University of Manitoba EPIC Procurement Test Site interface. The search results for 'oxygen' are displayed, showing two items:

Item Description	Price	Supplier	Supplier Part #	Availability
OXYGEN,COMPRESSED GAS CLASS 2.2 (5.1) 6.90M3 ...	\$15.51 CAD	Welders Supplies Ltd.	GAS OXMK	0 Day(s)
OXYGEN,COMPRESSED GAS CLASS 2.2 (5.1) UN1072 ...	\$11.04 CAD	Welders Supplies Ltd.	GAS OXS	0 Day(s)

The interface includes a search bar with 'oxygen' entered, a search button, and a 'Create Non-Catalog Item' button. The search results are sorted by Relevance, and the page shows 31 items found. The browser status bar at the bottom indicates 'Internet | Protected Mode: On' and '100%' zoom.

Favorites

Favorites provide a fast way for you to find your frequently ordered products. You create your own Favorites and can select as many items as you like – these favorites only appear under your login. **Catalog items that have been assigned to a favorite group are marked with a star when displayed in the catalog.

Favorites are searchable and will appear in a catalog search if applicable. If a catalog item that you marked as a favorite is removed from the system, a dialog appears to warn you that one or more favorites are no longer available.

Adding to Favorites

If this is an item that you would purchase regularly you have the option to add your preferred choice to your list of Favorites. This will then make future searching easier.

1. Identify your preferred item on the list and click **Add to Favorites**

The screenshot shows a product listing page with two items. The first item is "OXYGEN, COMPRESSED GAS CLASS 2.2 (5.1) 6.90M3 ..." priced at \$15.51 CAD. It has a quantity input field set to 1 and two buttons: "Add to Cart" and "Add to Favorites". The "Add to Favorites" button is circled in red. The second item is "OXYGEN, COMPRESSED GAS CLASS 2.2 (5.1) UN1072 ..." priced at \$11.04 CAD, also with a quantity input field set to 1 and "Add to Cart" and "Add to Favorites" buttons. The "Add to Favorites" button is also circled in red. The page includes navigation elements like "Add to Cart", "Compare", and "Add to Favorites" at the top, and a "Page 1" indicator on the right.

- A downward arrow will appear as you hover over **Add to Favorites**.

2. Select **Add** from drop down list

The screenshot shows the same product listing page as above, but with a dropdown menu open over the "Add to Favorites" button of the first item. The dropdown menu contains the following options: "Add", "Add To Folders...", "-----", and "Organize Favorites...". The "Add" option is circled in red. The page also shows search results information: "Your search path: All Categories > 'oxygen'", "31 items found", "Show: 20 | 50 | 100 results per page", "Sort By: Relevance | Price | Best selling | Name", and "View: Details | Thumbnails".

- Once you have added the item as a Favorite a **Star** will appear beside the item

Your search path: [All Categories](#) > "oxygen"

31 items found Show: 20|50|100 results per page Sort By: [Relevance](#) | [Price](#) | [Best selling](#) | [Name](#) View: [Details](#) | [Thumbnails](#)

[Add to Cart](#) [Compare](#) [Add to Favorites](#) Page 1

OXYGEN,COMPRESSED GAS CLASS 2.2 (5.1) 6.90M3 ... Supplier: [Welders Supplies Ltd](#)

\$15.51 CAD Supplier Part #: GAS OXMK

Qty: Available in: 0 Day(s)

[Add to Cart](#) [Add to Favorites](#)

OXYGEN,COMPRESSED GAS CLASS 2.2 (5.1) 6.90M3 6900L (MEDICAL K)

Organizing your Favorites

Once you have searched a few times and have added multiple items as Favorites, you can organize your Favorite items.

- Click **Add to Favorites** beside first displayed item

- Select **Organize Favorites** from drop down list

Your search path: [All Categories](#) > "oxygen"

31 items found Show: 20|50|100 results per page Sort By: [Relevance](#) | [Price](#) | [Best selling](#) | [Name](#) View: [Details](#) | [Thumbnails](#)

[Add to Cart](#) [Compare](#) [Add to Favorites](#) Page 1

OXYGEN,COMPRESSED GAS CLASS 2.2 (5.1) 6.90M3 ... Supplier: [Welders Supplies Ltd](#)

\$15.51 CAD Supplier Part #: GAS OXMK

Qty: Available in: 0 Day(s)

[Add to Cart](#) [Add to Favorites](#)

OXYGEN,COMPRESSED GAS CLASS 2.2 (5.1) 6.90M3 6900L (MEDICAL K)

OXYGEN,COMPRESSED GAS CLASS 2.2 (5.1) UN1072 ... Supplier: [Welders Supplies Ltd](#)

\$11.04 CAD Supplier Part #: GAS OXS

Qty: Available in: 0 Day(s)

[Add to Cart](#) [Add to Favorites](#)

OXYGEN,COMPRESSED GAS CLASS 2.2 (5.1) UN1072 4.27M3 (S S17F)

All items you have previously selected as **Favorites** will be displayed in the window

UNIVERSITY OF MANITOBA EPIC Test Site Help

Home Sourcing Contracts **Procurement** Invoicing Suppliers Welcome Leah Enright (rose33) - University of Manitoba

Create Search Manage Community

Organize Favorites Done

Create, modify, or delete favorite folders. You can also delete items from favorite folders or move items among folders by dragging them over. You can make a folder public only if you have the ...

Name ↑	Created By	Public	Public To Groups	Public Add	Public Delete
[-] OXYGEN,COMPRESSED CLASS 2.2(5.1)					
[-] OXYGEN,COMPRESSED CLASS 2.2(5.1)					
[-] OXYGEN,COMPRESSED GAS CLASS 2.2 (5.1) 6.90M3 ...					

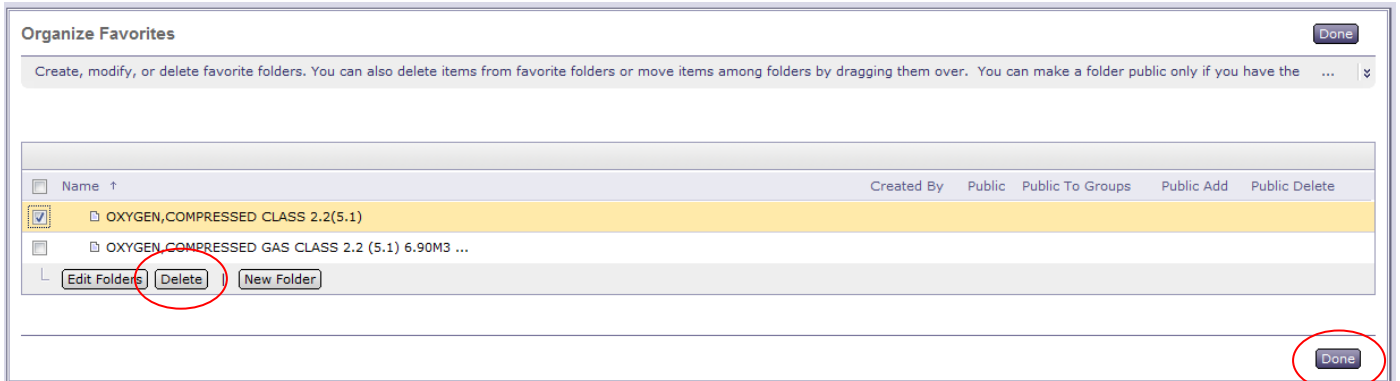
[Edit Folders](#) [Delete](#) | [New Folder](#)

Done

Deleting a Favorite

In the event that you would like to remove an item from your list of Favorites:

- Click the **box** beside the item you would like to delete– the box is checked and the item will be highlighted as portrayed below.

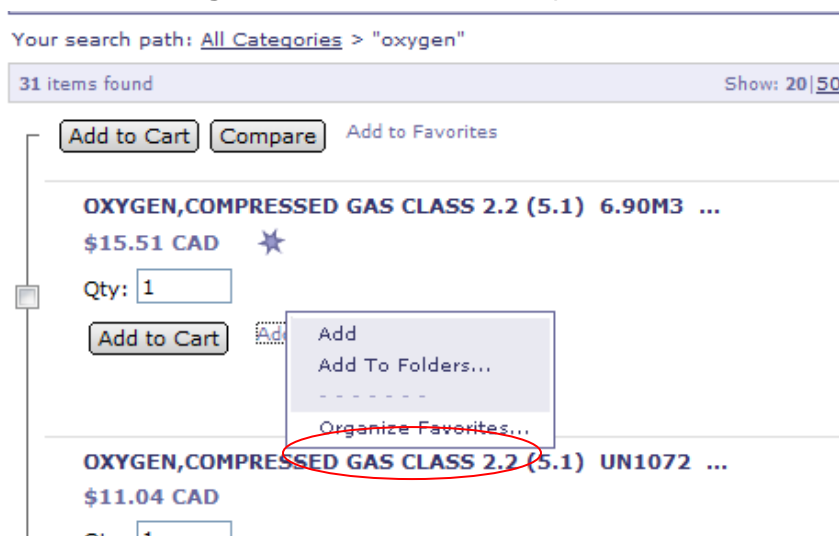


- Click **Delete button** below and the item will be removed from the list.
- If that is the only task you wish to complete, click the Done button on the right hand corner of the screen, you will then be returned to the search results

Creating Favorite Folders

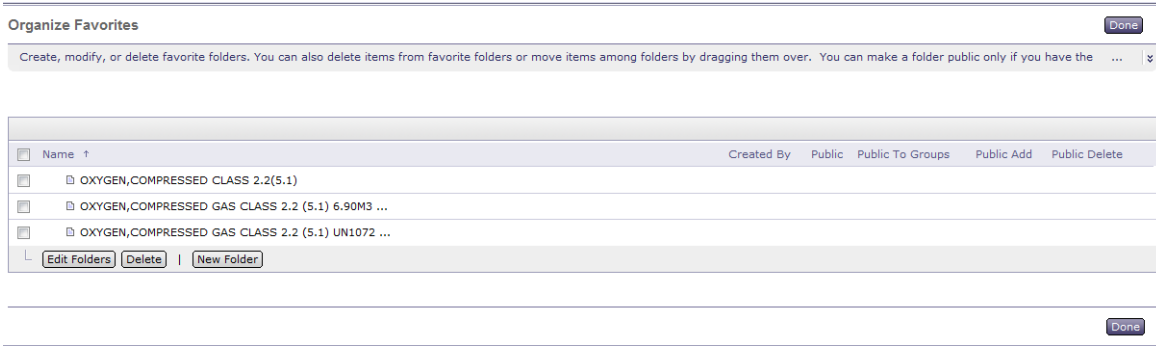
Once you have started searching for multiple items and assigning Favorite status to the items, you may want to create Favorite Folders.

1. Click **Add to Favorites** beside first displayed item
 - Select **Organize Favorites** from drop down list

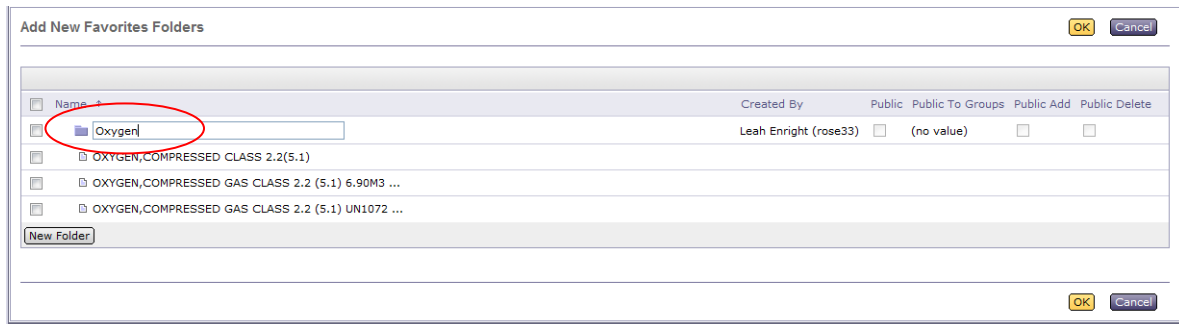


- Your list of previously added Favorites will appear.

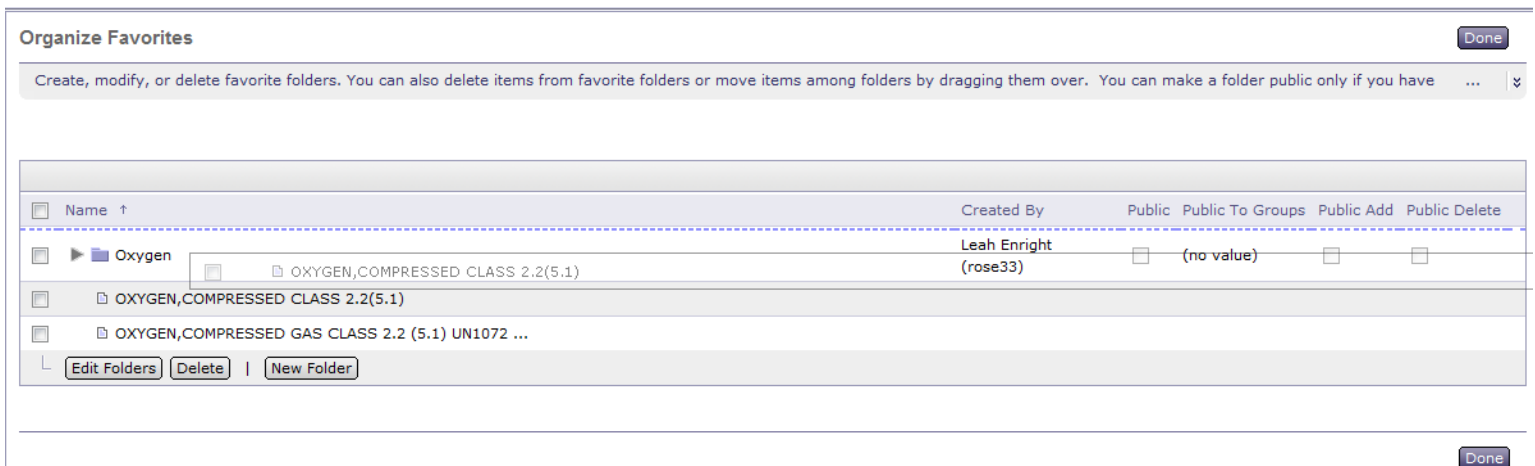
- To create a **New Folder**, click the **New Folder** button at the bottom on the page.



- A **New Folder** will appear and will allow you to click in the box and rename the folder to your choosing (For Example: Oxygen)
- Once you have renamed the folder, **click OK**



- Once you have your new folder, you can then drag and drop your favorite items into the new folder. Click **Done** once you have added all the items into the folder.



- After clicking Done, you will be returned back to the **Search** screen.
- Now that you have created a **Favorite folder** for your items related to **Oxygen**, you will be able to easily access your folder on the left hand menu

Refine your results

Keyword

- gas (8)
- medic (3)
- size (3)
- uhp (2)
- breath (1)
- Show All ...

Supplier

- Medigas Manitoba Ltd (23)
- Welders Supplies Ltd (8)

Price

- \$0.00 CAD (22)
- \$1.00 - \$10.00 CAD (2)
- \$10.00 - \$100.00 CAD (5)
- \$100.00 - \$1,000.00 ... (2)

Favorites

- Recent Choices -
- Recent Choices -
- Oxygen
-
- Other...

- Once you choose your **Oxygen folder**, the favorite items will be displayed in the Search screen

UNIVERSITY OF MANITOBA EPIC Test Site

Home | Sourcing | Contracts | Procurement | Invoicing | Suppliers

Create | Search | Manage | Preferences | Community

Home | Help | Logout

Welcome Leah Enright (rosa33) - University of Manitoba

Refine your results

Keyword

- medic (1)
- size (1)
- Show All ...

Supplier

- Medigas Manitoba Ltd (1)
- Welders Supplies Ltd (2)

Price

- \$10.00 - \$20.00 CAD (2)

Favorites

- Oxygen

Catalog Home

All Categories | oxygen | Search | Options | Create Non-Catalog Item

Your search path: All Categories > "oxygen"

These items are from favorite folder "Oxygen".

3 items found | Sort By: Relevance | Price | Best selling | Name | View: Details | Thumbnails

[Add to Cart] [Compare] Add to Favorites

OXYGEN,COMPRESSED GAS CLASS 2.2 (5.1) 6.90M3 ... Supplier: [Welders Supplies Ltd.](#)

\$15.51 CAD ★

Supplier Part #: GAS OXMK

Available in: 0 Day(s)

Qty: 1

[Add to Cart] Add to Favorites

OXYGEN,COMPRESSED GAS CLASS 2.2 (5.1) 6.90M3 6900L (MEDICAL K)

OXYGEN,COMPRESSED GAS CLASS 2.2 (5.1) UN1072 ... Supplier: [Welders Supplies Ltd.](#)

\$11.04 CAD ★

Supplier Part #: GAS OXS

Available in: 0 Day(s)

Qty: 1

[Add to Cart] Add to Favorites

OXYGEN,COMPRESSED,GAS,CLASS,2,2,(5,1),UN1072,4,27M3,(S,SIZE)

To exit the favorites folder, click the lock icon beside the favorites folder in order to release the search parameters.

Compare Items

When searching for an item, in many cases you will be provided with multiple choices and results. EPIC allows you to easily compare items multiple items side by side, so you can be clear on the differences and similarities to make choosing the appropriate item that much easier.

Complete a search for an item you would like to purchase.

The screenshot shows the EPIC search results for 'oxygen'. On the left, there is a 'Refine your results' sidebar with filters for Keyword (gas, medic, size, uhp, breath), Supplier (Medigas Manitoba Ltd, Welders Supplies Ltd), Price (\$0.00 CAD to \$1,000.00 CAD), and Favorites (- Recent Choices). The main search area shows 'Catalog Home' with a search bar containing 'oxygen' and a 'Search' button. Below the search bar, it indicates 'Your search path: All Categories > "oxygen"' and '31 items found'. The results are displayed in a table with columns for item name, price, quantity, and supplier. The first item is 'OXYGEN, COMPRESSED CLASS 2.2(5.1)' for \$0.00 CAD, supplied by Medigas Manitoba Ltd. The second item is 'OXYGEN, COMPRESSED GAS CLASS 2.2 (5.1) 6.90M3 ...' for \$15.51 CAD, supplied by Welders Supplies Ltd. Each item has an 'Add to Cart' button and a 'Compare' button. A vertical line on the left side of the item list indicates that items are being compared.

- Once EPIC has presented you with your search results, choose the items that you would like to compare by clicking the boxes to the left of the item.

This screenshot is similar to the previous one, but it highlights the 'Compare' boxes for three items. A red oval is drawn around the checkboxes on the left side of the first three items: 'OXYGEN, COMPRESSED CLASS 2.2(5.1)', 'OXYGEN, COMPRESSED GAS CLASS 2.2 (5.1) 6.90M3 ...', and 'OXYGEN, COMPRESSED GAS CLASS 2.2 (5.1) UN1072 ...'. Each item has a checked checkbox, indicating that these items have been selected for comparison.

- Once the boxes are check marked, at the top of the search results find and click **Compare**
 - You will be directed to another page and your items will be displayed side by side for comparison

	Qty: <input type="text" value="1"/> <input type="button" value="Add to Cart"/>	Qty: <input type="text" value="1"/> <input type="button" value="Add to Cart"/>	Qty: <input type="text" value="1"/> <input type="button" value="Add to Cart"/>
Item Image			
Price	\$0.00 CAD	\$15.51 CAD	\$11.04 CAD
Product Description	OXYGEN,COMPRESSED CLASS 2.2 (5.1)	OXYGEN,COMPRESSED GAS CLASS 2.2 (5.1) 6.90M3 6900L (MEDICAL K)	OXYGEN,COMPRESSED GAS CLASS 2.2 (5.1) UN1072 4.27M3 (S SIZE)
Supplier	Medigas Manitoba Ltd.	Welders Supplies Ltd.	Welders Supplies Ltd.
Supplier Part #	GAS OXMEXRS	GAS OXMK	GAS OXS
Manufacturer			
Manufacturer Part #		GAS OXMK	GAS OXS
Available in	0 Day(s)	0 Day(s)	0 Day(s)
Information from Supplier			
Information from Manufacturer			

- If you are ready to make your purchase, click **Add to Cart** as well as ensure you have chosen the appropriate quantity of the item

- You will then be redirected to finish the requisition process
- If you do not want any of the items that you are comparing, click **Done** in the right hand corner of the **Compare Items** screen.

Refine Search Results

If you have a clear idea on what you would like to search there is an opportunity to refine your search results by using the Refine your results side bar on the left hand side of your screen.

Refine your results

Keyword
 gas (8)
 medic (3)
 size (3)
 uhp (2)
 breath (1)
 Show All ...

Supplier
 Medigas Manitoba Ltd (23)
 Welders Supplies Ltd (8)

Price
 \$0.00 CAD (22)
 \$1.00 - \$10.00 CAD (2)
 \$10.00 - \$100.00 CAD (5)
 \$100.00 - \$1,000.00 ... (2)

Favorites
 - Recent Choices - ▾

- Once you have inserted your search item on the main search page and you are presented with the results, on the side bar, click Show ALL under KEYWORD menu
- An expanded view of the keyword options will be displayed
- Out of the options, choose the criteria you would like use to narrow your search
- Your research results will then be refreshed and the item based on your refined criteria will then be displayed

You can also utilize the “Sort by” buttons at top right to display results by Relevance, Price, Best Selling and Name.

The screenshot shows a search results page for 'oxygen'. At the top, there is a search bar with 'oxygen' entered and buttons for 'Search' and 'Options'. A 'Create Non-Catalog Item' button is on the right. Below the search bar, it says 'Your search path: All Categories > "oxygen" > size'. It indicates '3 items found'. At the bottom of the search results area, there are buttons for 'Add to Cart', 'Compare', and 'Add to Favorites'. On the right side, there are 'Sort By' options: Relevance, Price, Best selling, and Name. There are also 'View: Details | Thumbnails' options.

Saved Searches

Create a search for items you purchase on a regular basis. You can save a search for future use, which saves you time creating requests. When you save a search, you save the query, rather than a fixed group of items.

Saved searches are listed under the “Saved Searches” section of the Options menu

The screenshot shows the EPIC system interface. At the top, there is a navigation bar with 'UNIVERSITY OF MANITOBA EPIC Test Site' and 'Home | Help | Logout'. Below that is a secondary navigation bar with 'Home Sourcing Contracts Procurement Invoicing Suppliers'. A 'Welcome Leah Enright (rose33) - University of Manitoba' message is on the right. The main content area shows the search results for 'oxygen'. A dropdown menu is open under the 'Options' button, showing 'Additional...', 'Click this link to open a menu of search options', 'Manufacturer Part #', '50 100 results per page', 'Sort By: Relevance | Price | Best selling | Name', 'View: Details | Thumbnails', 'Saved searches', and 'Save current search...'. The search results show '31 items found'. One item is visible: 'OXYGEN, COMPRESSED CLASS 2.2(5.1)' with a price of '\$0.00 CAD' and a quantity of '1'. The supplier is 'Medigas Manitoba Ltd'. There are buttons for 'Add to Cart', 'Compare', and 'Add to Favorites'.

- Click **Save Current Search...**

- You will be redirected to the following page:

UNIVERSITY OF MANITOBA EPIC Test Site

Home | Help | Logout

Home Sourcing Contracts Procurement Invoicing Suppliers

Welcome Leah Enright (rose33) - University of Manitob


Create Search Manage Preferences Community

Save Catalog Search

Choose a descriptive name for this search. This will help you to find and reuse it later in the search options menu.

Search Name:

Save Cancel

- Click Save 
- The home page will appear.
- Click on the **“Options”** hyperlink next to your search bar and you will see you Oxygen Search saved as an option for future searches.

UNIVERSITY OF MANITOBA EPIC Test Site

Home | Help | Logout

Home Sourcing Contracts Procurement Invoicing Suppliers

Welcome Leah Enright (rose33) - University of Manitoba

Create Search Manage Preferences Community

Refine your results

Keyword

- gas (8)
- medic (3)
- size (3)
- uhp (2)
- breath (1)
- Show All ...

Supplier

- Medigas Manitoba Ltd (23)
- Welders Supplies Ltd (8)

Catalog Home

oxygen Search Options [Create Non-Catalog Item](#)

Your search path: [All Categories](#) > "oxygen"

Your search named "oxygen search" has

31 items found

50 | 100 results per page Sort By: [Relevance](#) | [Price](#) | [Best selling](#) | [Name](#) View: [Details](#) | [Thumbnails](#)

[Add to Cart](#) [Compare](#) [Add to favorites](#)

OXYGEN, COMPRESSED CLASS 2.2(5-1)

Supplier: [Medigas Manitoba Ltd](#)

\$0.00 CAD ★

Supplier Part #: GAS OXMEXRS

Available in: [\(0 Days\)](#)

Page 1

Module 3: Creating and Managing Requisitions

Online Requisitioning

Online requisitioning is offered through EPIC and can meet most of your procurement needs, Online requisitioning can be used for:

1. Goods or Services up to the value of \$25,000 without Purchasing Services intervention.
2. Catalog and non-catalog based items.

Requisition Process

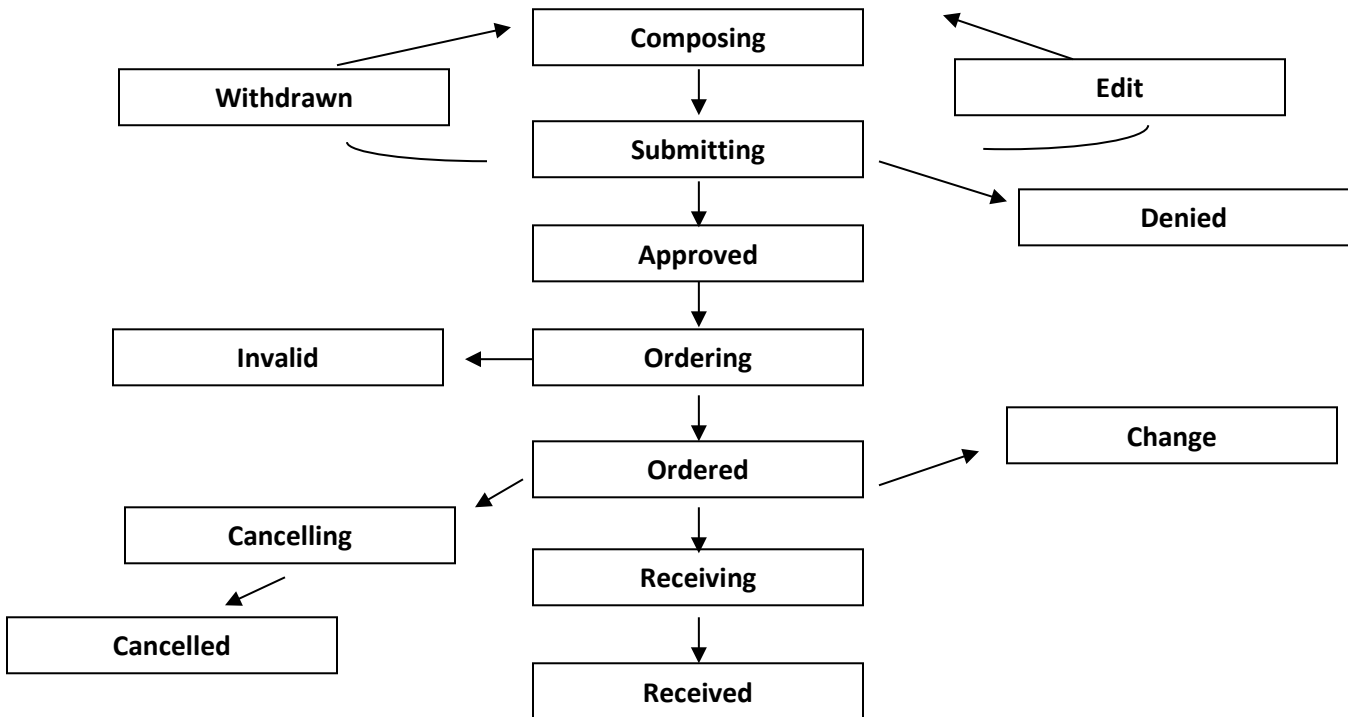
A purchase requisition (PR) is an approvable document that is created when you submit a request to purchase items. Each PR has a **unique ID (such as PR3248)** to identify and track it as it moves through the requisition process.

A purchase requisition follows this general process:

1. Request goods by completing a PR and submitting it for approval.
2. The PR is routed to everyone identified in the approval flow The base approval flow will always include your signing authority. Additional approvers may include commodity item approvers, Research accounting approvers, Purchasing Services and so on.
3. All approvers approve or deny the PR. If the PR is fully approved, a purchase order (PO) is created. If there is more than one supplier included in the PR, a purchase order is created for each supplier. If the PR is denied, the approver can provide comments as to why it was denied at which time you can withdraw it, or edit it and resubmit it for approval.
4. Suppliers receive the PO, ship the items, and invoice for items.
5. Items with a unit price under \$2500 will be auto-received in EPIC. All items with a unit price of \$2500 or more will require receiving within EPIC.
6. You receive the items and submit receipts as the items arrive. If the items arrive in batches, partial receipts are maintained and the overall receipt is kept active until all items have been received.

Requisition Status

Requisitions can be in various statuses. The status is an important indicator of where the document is in the requisition process.



Composing:

The author is still working on it and has not yet submitted it. When you leave a request in the **Composing** state, it is as if you had picked up a paper form, filled it out, and left it on your desk. You can choose to submit it later, or you can leave it on your desk in case you want to work on it later, or choose not to use it and discard it. While a request has the status of **Composing** it is private.

Submitted:

Order has been submitted for approval. It has not been fully approved, it has not been denied, but it is somewhere in the approval process. There is at least one person who still needs to take approval action.

Denied:

A user in the approval chain has chosen to deny the request. After a request has been denied, it typically stays in the Denied state indefinitely, until either the preparer chooses to resubmit the request, or the person who originally denied the request changes his or her mind and uses the Approve command to approve.

Approved:

Your request is approved by all of the required approvers. The status changes to **Ordering** only after all of the required approvers have approved the requisition and the Delay Purchase Until date has been reached.

Collaborating:

Purchasing Services is currently obtaining quotes from Suppliers on one or more items within your requisition. When the collaboration is complete, the status will move from Collaborating to Submitted as it moves through the approval flow.

Ordering:

The requisition was fully approved, and is now in the process of being converted to one or more orders. Usually requests are in the Ordering state for a brief time while the order is being generated and transmitted. Once an order is transmitted successfully to the supplier, the request should transition to the Ordered state.

When you are displayed as the final approver, the selected supplier is not on the Ariba network meaning that we are not set up to transact with them electronically and you will need to email or fax the order to the supplier once it is fully approved. The notification you will receive in your email will identify the supplier you need to send the order to.

Occasionally you may see a request linger in the Ordering state, such as when there may be problems while transmitting an order to the supplier. When a request is stuck in some way, you can contact the Helpdesk for assistance. If required Purchasing Services can choose to handle the order manually and use the **Force Order** command to force the status from **Ordering** to **Ordered** then manually send the order to the supplier

Ordered:

The items on the requisition successfully created one or more purchase orders.

A requisition will stay in the ordered state until one of two things happens:

1. The requester says that all the items from the original requisition have been received.
2. The requester decides to cancel the order. (The state of both the original requisition and its associated purchase order change to Cancelling or Cancelled).

Cancelling:

An item has been ordered, but someone has asked for that order to be cancelled. If the supplier is not in the system the user will be required to contact the supplier before the order is cancelled in EPIC to ensure the goods have not yet been shipped. Usually requests are in the Cancelling state only for a very brief time while the system makes sure that the cancellation has been transmitted successfully. When the cancellation order makes it through, the document will transition to the Cancelled state.

Occasionally, you may see a request linger in this state, for example, if EPIC is communicating with the supplier via fax and there has been a fax transmission error.

When a request is stuck in some way, you can contact the Helpdesk for assistance. If required Purchasing Services can handle the order manually and then use the Force Cancel command to force the state into Cancelled and communicate the cancellation to the supplier.

Cancelled:

A requisition was approved and an order was created, but the requester later chose to cancel that order. When an order is cancelled, assuming contact with the supplier has been made for the cancellation and the order has not been shipped, both the original requisition and its associated order have the status of cancelled.

Receiving:

A purchase requisition was approved and ordered. In addition, the requester has entered a partial receipt for the order, meaning that some, but not all, of the items have been received.

A request might stay in the **Receiving** state for quite a while if some items are delayed or rejected. Or it might go straight through to Received, if the items all arrive together and are received (accepted) together.

Received:

When a document has the status of **Received**, it means that the order is closed in EPIC:

1. A requisition has been submitted and approved.
2. The order has been sent.
3. The goods have been shipped and received.

Once a request has reached the **Received** state, it stays there. Once the goods have been shipped and received, there is nothing further to do in the ordering process.

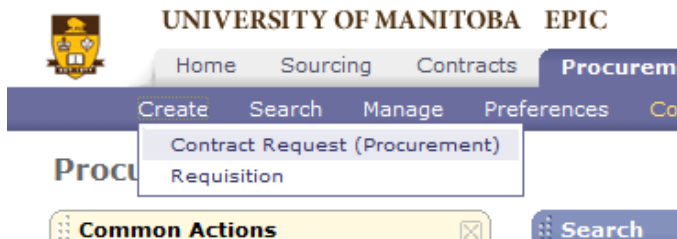
This does not necessarily mean all the accounting has been completed including reimbursement payments, and potential variances between the requisition and the purchase order.

Creating a Requisition

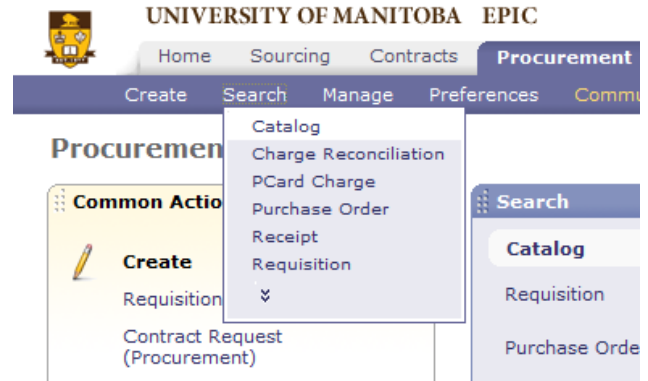
When you create a purchase requisition, you are creating an “approvable” document that triggers the creation of purchase orders once it has been fully approved.

To begin creating a requisition, either select **Search the Catalog** or **Requisition** from the **Create menu** or. Either option takes you to the EPIC Catalog Home.

When creating a requisition it is important to search the catalogs first for available options.



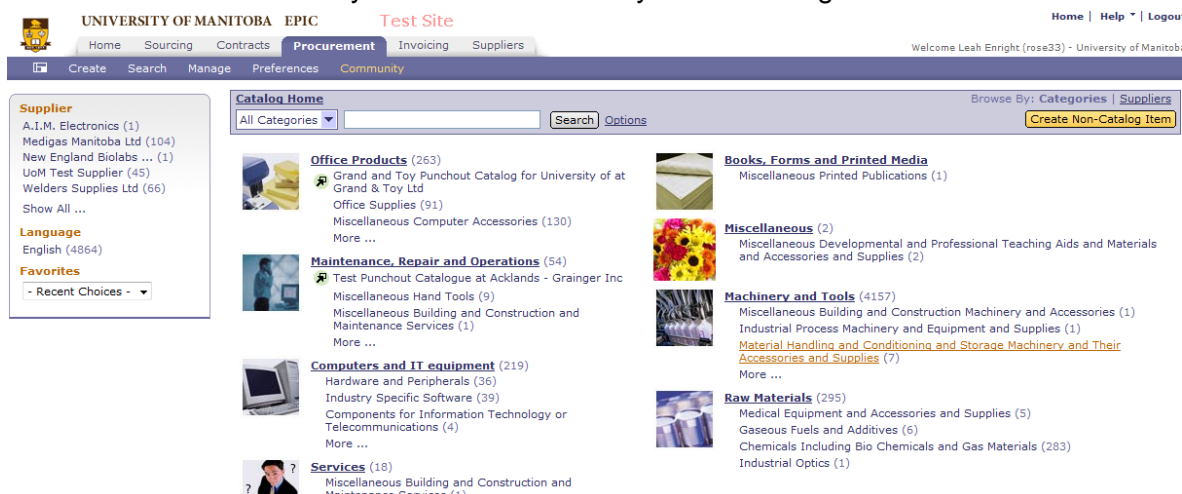
Sample Catalog View



From the catalog, you can add items to a shopping cart. These items may be goods, such as office supplies, computers, or Faculty-branded shirts. You may also be able to add some services. Some items will require additional information to be entered before the requisition is submitted, such as shirt size or colour. You can leave the requisition and come back to it later without submitting it for approvals by saving it.

The Requisition page contains several areas:

1. Search for catalog items: This enables you to search all available catalogs for desired items. You can narrow the search by catalog category, or by using search options.
2. Browse by categories or suppliers: Click Suppliers to see a view of the available suppliers you can select to add to your requisition or select a category from the catalog home
3. View popular categories of catalog items: These views allow you to quickly find and select the most popularly used catalog items.
4. Create non-catalog items: You can request items that do not exist in the catalog but remember to always check for availability in the catalogs first.



Add a Local Catalog Item

1. Click the link of the category that contains the item you need and drill down within the category to locate the item or locate the search box and enter the catalog item you wish to search for.

Catalog Home Browse By: [Categories](#) | [Suppliers](#)

All Categories [Options](#)

- Office Products** (263)
 - Grand and Toy Punchout Catalog for University of at Grand & Toy Ltd
 - Office Supplies (91)
 - Miscellaneous Computer Accessories (130)
 - More ...
- Maintenance, Repair and Operations** (54)
 - Test Punchout Catalogue at Acklands - Grainger Inc
 - Miscellaneous Hand Tools (9)
 - Miscellaneous Building and Construction and Maintenance Services (1)
 - More ...
- Computers and IT equipment** (219)
 - Hardware and Peripherals (36)
 - Industry Specific Software (39)
 - Components for Information Technology or Telecommunications (4)
 - More ...
- Services** (18)
 - Miscellaneous Building and Construction and Maintenance Services (1)
 - Paper Products (14)
 - Postal and Small Parcel and Courier Services (3)
- Books, Forms and Printed Media** (1)
 - Miscellaneous Printed Publications (1)
- Miscellaneous** (2)
 - Miscellaneous Developmental and Professional Teaching Aids and Materials and Accessories and Supplies (2)
- Machinery and Tools** (4157)
 - Miscellaneous Building and Construction Machinery and Accessories (1)
 - Industrial Process Machinery and Equipment and Supplies (1)
 - Material Handling and Conditioning and Storage Machinery and Their Accessories and Supplies (7)
 - More ...
- Raw Materials** (295)
 - Medical Equipment and Accessories and Supplies (5)
 - Gaseous Fuels and Additives (6)
 - Chemicals Including Bio Chemicals and Gas Materials (283)
 - Industrial Optics (1)

Results will be displayed as follows:

Catalog Home Browse By: [Categories](#) | [Suppliers](#)

All Categories [Options](#)

Your search path: All Categories > "tube"

435 items found Show: 20 | 50 | 100 results per page | Sort By: [Relevance](#) | [Price](#) | [Best selling](#) | [Name](#) | View: [Details](#) | [Thumbnails](#)

Page 1

	PROTEAN II, 2D SYST, 1.5MM, 20CM \$2,705.00 CAD <input type="button" value="Info"/> Qty: <input type="text" value="1"/> <input type="button" value="Add to Cart"/> Add to Favorites	Supplier: Bio-Rad Laboratories Canada Ltd. Supplier Part #: 1651934 Available in: 6 Day(s)
	GROMMET, 4-5MM, OD TUBES \$110.00 CAD <input type="button" value="Info"/> Qty: <input type="text" value="1"/> <input type="button" value="Add to Cart"/> Add to Favorites	Supplier: Bio-Rad Laboratories Canada Ltd. Supplier Part #: 1651984 Available in: 3 Day(s)
	TUBE, STRIP-8, PINK 120 STRIPS \$129.00 CAD <input type="button" value="Info"/>	Supplier: Bio-Rad Laboratories Canada Ltd. Supplier Part #: TBS0211

Refine your results

Keyword

- pkg (154)
- includ (93)
- kit (60)
- use (60)
- gel (53)
- Show All ...

Category

- Cathode Ray Tube ... (10)
- Laboratory and ... (137)
- Laboratory Supplies ... (255)
- Miscellaneous ... (1)
- Packaging Materials (1)
- Show All ...

Supplier

- Bio-Rad ... (232)
- Sarstedt Inc. (193)
- UoM Test Supplier (10)
- Show All ...

Manufacturer

- Bio-Rad ... (232)
- SARSTEDT Inc. (193)

Price

- \$0.10 - \$1.00 CAD (1)
- \$1.00 - \$10.00 CAD (26)
- \$10.00 - \$100.00 CAD (218)
- \$100.00 - \$1,000.00 (156)

Local catalog items show an **Add to Cart** button on the catalog search result page.

Add to Cart

2. Choose the item you wish to purchase and enter the quantity that you want to order.



GLASS TUBES, FROSTED, 6
\$84.00 CAD 
Qty:
 [Add to Favorites](#)

Supplier: [Bio-Rad Laboratories Canada Ltd.](#)
Supplier Part #: 1652978
Available in: **15** Day(s)

Pkg of 6, glass tube for use with Model 422 electro-eluter (#165-2976)

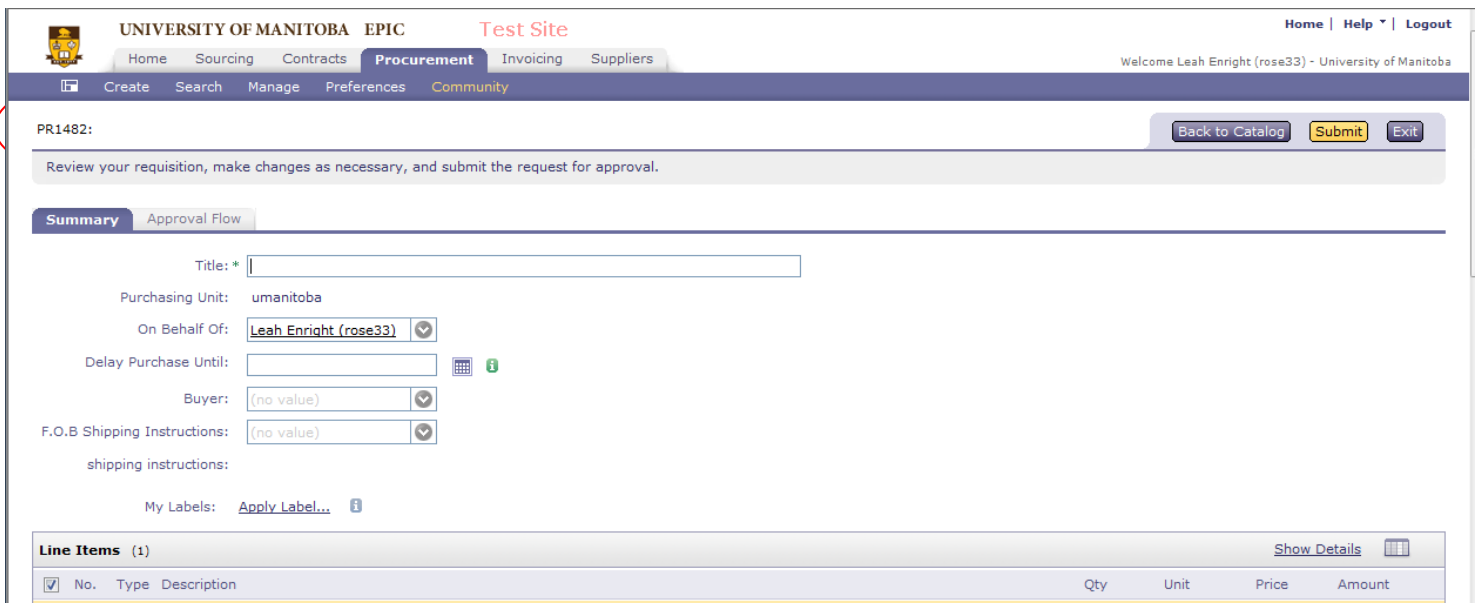
3. Click **Add to Cart** to add the item to begin your requisition.



To add multiple items, select the **check box** for each item, then click **Add to Cart** at the top or the bottom of the items list.

You will be redirected to the screen where you will begin to fill out the required information to begin the requisition process.

A requisition number has been assigned to your request, for example: PR1482 and is located at the top of the PR screen.



UNIVERSITY OF MANITOBA EPIC Test Site Home | Help | Logout
Home Sourcing Contracts **Procurement** Invoicing Suppliers
Welcome Leah Enright (rose33) - University of Manitoba
Create Search Manage Preferences Community


PR1482:



Review your requisition, make changes as necessary, and submit the request for approval.


Summary Approval Flow


Title: *

Purchasing Unit: umanitoba


On Behalf Of: [Leah Enright \(rose33\)](#) 


Delay Purchase Until:  

Buyer: (no value) 

F.O.B Shipping Instructions: (no value) 

shipping instructions:

My Labels: [Apply Label...](#) 

Line Items (1) [Show Details](#) 

<input checked="" type="checkbox"/>	No.	Type	Description	Qty	Unit	Price	Amount
-------------------------------------	-----	------	-------------	-----	------	-------	--------

4. Within the summary tab, add the required details:

- Add request **Title**: Enter a brief, descriptive title for your requisition. You should be able to differentiate your different requisitions by title. It is recommended that you include your Faculty or Department name preceding the title to assist in searching for them later i.e. **“Medicine-Lab Supplies for Dr. Jenkins”**

PR1482: Back to Catalog Submit Exit

Review your requisition, make changes as necessary, and submit the request for approval.

Summary Approval Flow

Title: * Lab Supplies for Dr. Jenkins

Purchasing Unit: umanitoba

On Behalf Of: Leah Enright (rose33)

Delay Purchase Until: 📅 ⓘ

Buyer: (no value)

F.O.B Shipping Instructions: (no value)

shipping instructions:

My Labels: [Apply Label...](#) ⓘ

Line Items (1) Show Details 📄

No.	Type	Description	Qty	Unit	Price	Amount
1		GLASS TUBES, FROSTED, 6	2	each	\$84.00 CAD	\$168.00 CAD

- **On behalf of**: This is the individual whom the goods or services are for. The individual listed in this field will be responsible to enter receiving and review variances on invoices if any apply. Any user can submit a request on behalf of any other user. See screenshot below:

On Behalf Of: Leah Enright (rose33)

Delay Purchase Until: 📅 ⓘ

Buyer: (no value)

- **Delay Purchase Until** field – Leave blank if ordering immediately
Allows you to specify the date on which you want the purchase order sent to the supplier if you don't want the order sent as soon as the request is approved.



If you want to process this purchase today- skip this step.

Delay Purchase Until: 📅 ⓘ

Buyer: (no value)

F.O.B Shipping Instructions: (no value)


shipping instructions:

My Labels: [Apply Label...](#) ⓘ


Line Items (1)

Jun 12						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

- **Buyer field** – this field will be populated by Purchasing Services when they are involved in the request – **leave blank**

Buyer: 



- **FOB Shipping Instructions field** – this field will be populated by Purchasing Services when they are involved in the request – **leave blank**


F.O.B Shipping Instructions: 

- **My Labels:** You can assign one or more labels to your documents in order to find them easily. For example, you might use a project name as a label so you can search for all requisitions related to that project.

My Labels: [Apply Label...](#) 

- Scroll down to the middle of the page. Within the **Line Items section** of the page, the items you wish to purchase will be displayed.

Line Items (1)					Show Details 		
<input checked="" type="checkbox"/>	No.	Type	Description	Qty	Unit	Price	Amount
<input checked="" type="checkbox"/>	1		GLASS TUBES, FROSTED, 6	<input type="text" value="2"/>	each	\$84.00 CAD	\$168.00 CAD

 |


Total Cost: \$168.00 CAD

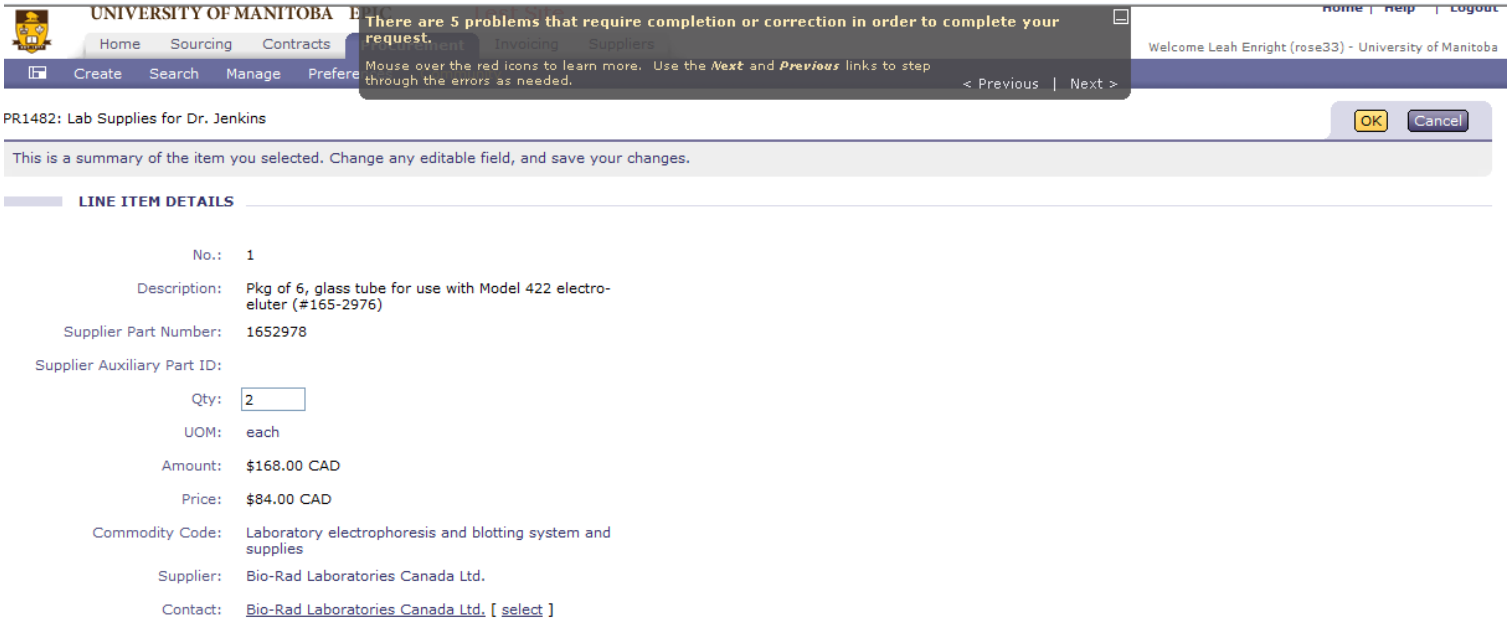
5. Edit Line Item Information

- The **check box** beside the line item must be checked



Item description and details are carried into your request from the catalog. This includes supplier part numbers, unit of measure, commodity codes and Supplier information

6. Below the item, Click the button marked **Edit** 
 - You will be redirected to a new page where you will be able to edit your **Line Item Details, Accounting by Line Item, Shipping by Line Item and Comments.**



UNIVERSITY OF MANITOBA | Home | Sourcing | Contracts | Invoicing | Suppliers | Welcome Leah Enright (rose33) - University of Manitoba

PR1482: Lab Supplies for Dr. Jenkins OK Cancel

This is a summary of the item you selected. Change any editable field, and save your changes.

LINE ITEM DETAILS

No.: 1

Description: Pkg of 6, glass tube for use with Model 422 electro-eluter (#165-2976)

Supplier Part Number: 1652978

Supplier Auxiliary Part ID:

Qty:

UOM: each

Amount: \$168.00 CAD

Price: \$84.00 CAD

Commodity Code: Laboratory electrophoresis and blotting system and supplies

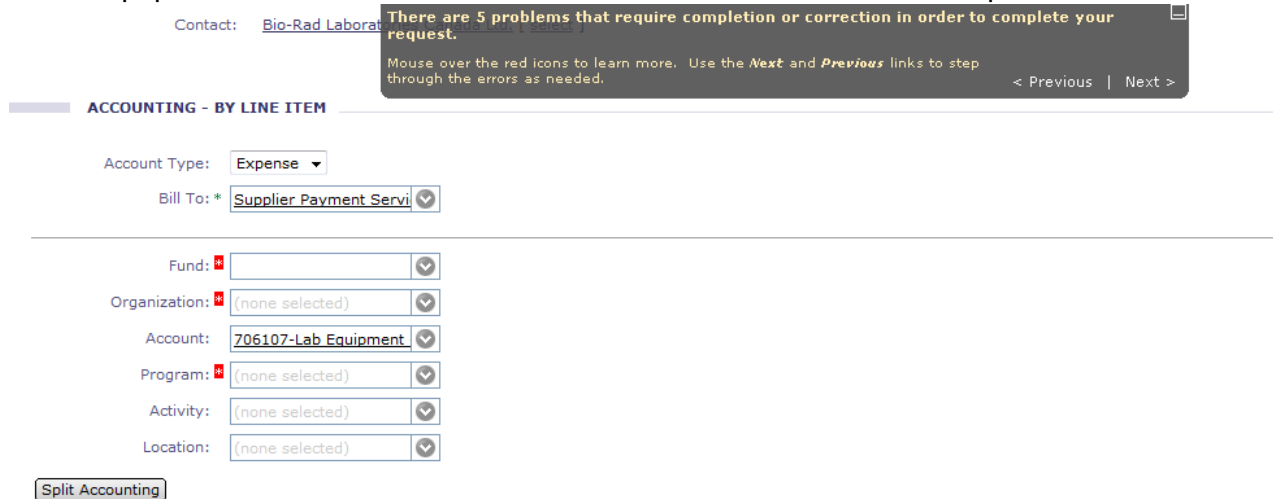
Supplier: Bio-Rad Laboratories Canada Ltd.

Contact: [Bio-Rad Laboratories Canada Ltd.](#) [select]

- Scroll down to **Accounting by Line Item** section



The red icons next to the fields indicate an error has been made, these are required fields and must be populated. Mouse over the red icon to learn more about what is required.



Contact: [Bio-Rad Laboratories Canada Ltd.](#)

ACCOUNTING - BY LINE ITEM

Account Type: Expense

Bill To: * [Supplier Payment Servi](#)

Fund:

Organization: (none selected)

Account: [706107-Lab Equipment](#)

Program: (none selected)

Activity: (none selected)


Location: (none selected)

- **FOP information** will be defaulted from your user profile – this can be typed over or the search function for accounting elements can be used.

- **Account** code has defaulted – this is based on the **selected commodity** in the catalog – this can be typed over or the search function for accounting elements can be used.

- Note: the last 5 accounting elements will be displayed in your drop down selection or you can search for additional codes. You can add **Comments and Attachments** to lines as well as the header. These can be made visible to the supplier by clicking the checkbox or they can remain internal notes. Comments marked visible to supplier will be passed to Banner thus appearing in FAST as well.

Ship to information has defaulted from the default Ship To code set in your profile preferences. These ship to codes will be taken from the profile preferences of whoever is indicated in the “On behalf of” field added at the top of the form – this field can be changed by the preparer

7. Once you have completed all the required fields on the form, at the bottom (or top) of the form - **Click OK** 

- You will now be returned to the request header
- Enter your **Need by Date** (required field)

Ensure that you don't put the current date in this field as EPIC will recognize that the order can not be shipped by that date and create errors which will prevent a Purchase Order from being created.

SHIPPING - ENTIRE REQUISITION

Ship To: * Agriculture Canada 

Deliver To: * 

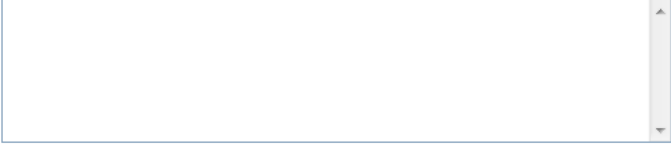
Need-by Date: *   

Need-by Date must be set.

- Scroll down to **Comments section**

Comments can be added to the header : before submitting your request, you may want to add comments and attachments. Comments help the approvers evaluate the request. In order to make these visible to the supplier the check box below must be checked Comments marked visible to supplier will be passed to Banner thus appearing in FAST as well.

COMMENTS - ENTIRE REQUISITION

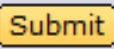
Comments: 

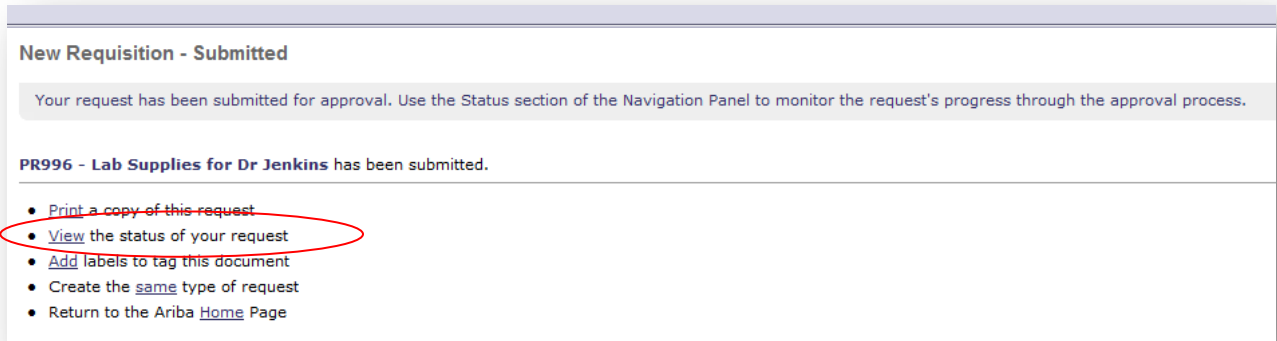
Visible to Supplier



You can exit and decide to save the request and edit it at a later time. In this case the status will be *Composing*.

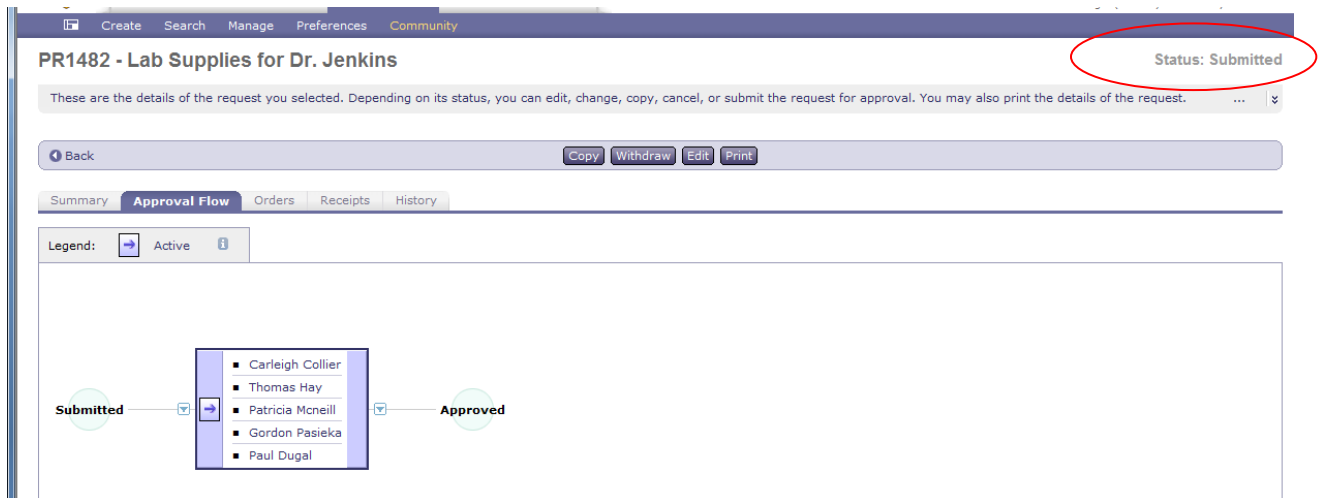
8. **Submit Request:** Click **Submit** to submit the request for approval. When you submit the request it has a status of *Submitted*. It will remain in this state until the last approver has approved the requisition or until an approver denies the requisition. The requisition will then move into the *Approved* or *Denied* status, respectively.

- At the Top or Bottom of your screen find and click the **Submit button** 
- Request is submitted to approval flow



- Click **View** to verify approval flow

Approval flow is displayed:



- Signing Authorities on selected FOP are displayed – only **one** of these individuals will need to approve the request for it to proceed
 - At top of screen, note Request status is “Submitted”
- Click **Home Tab** at top of page to return to Home page

[Home](#) | [Help](#) | [Logout](#)

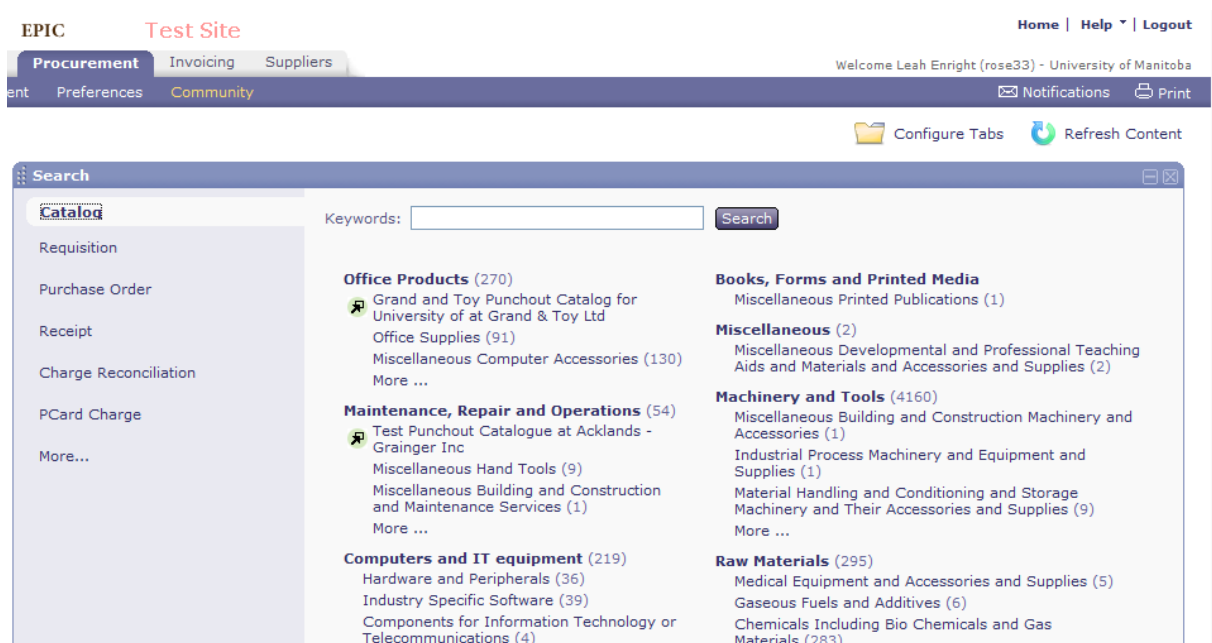
PunchOut Catalogs

A PunchOut Catalog is a supplier web-site which you can connect to from within EPIC. These catalogs are accessed from the Catalog search screen within EPIC and generally provide more information on the available products. A PunchOut catalog appears as a link to the suppliers catalog when items are searched in EPIC; this hyper-link takes you to the supplier Website where you can search and select products without ever leaving EPIC.

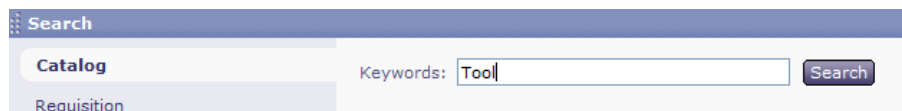
The PunchOut Process

To create a PunchOut request,

1. In the Search box on your home tab click **Catalog** on the sidebar.



2. Perform a search on an item you are looking to purchase, for example type **“Tool”** in the keywords search field and click the **Search** button.



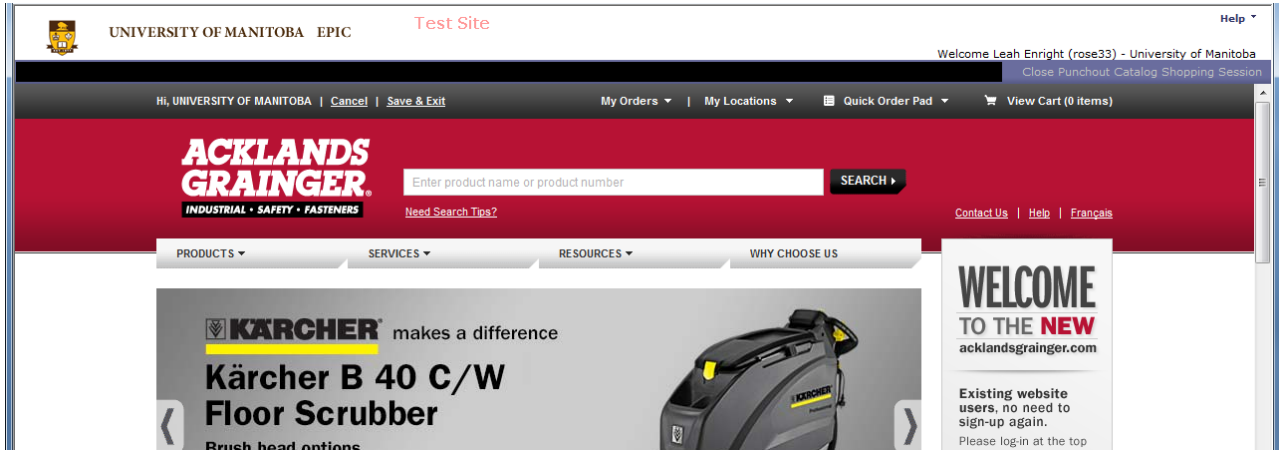
Your search will pull up a number of results including items from all available Catalogs that include items based on the keywords in your search.

The screenshot shows the EPIC Test Site interface. At the top, there are navigation links for 'Home', 'Help', and 'Logout'. Below that, a breadcrumb trail shows 'Contracts' > 'Procurement' > 'Invoicing' > 'Suppliers'. A search bar contains the word 'Tool' and a 'Search' button. Below the search bar, it says 'Your search path: All Categories > "Tool"'. A section titled 'Supplier Punchout Catalog Resources' lists three suppliers: 'New England Biolabs Ltd (1) Test NEB Canada Punch-out', 'Qiagen Inc. (1) University of Manitoba Punchout Catalog', and 'PerkinElmer LAS Canada Inc (1) PerkinElmer's catalog for University of Manitoba'. Below this, a product listing for 'GLASS TUBES, FROSTED, 6' is shown. The price is '\$84.00 CAD' and the quantity is '1'. The supplier is 'Bio-Rad Laboratories Canada Ltd.'. There are buttons for 'Add to Cart', 'Compare', and 'Add to Favorites'.

3. Choose the PunchOut Catalog resource you would like to purchase your tool from. For example click on the link under Acklands- Grainger Inc (1) listed as **“Test PunchOut Catalog.”** The supplier name listed on top is a title and the catalog name subtitle underneath is the catalog link.

This screenshot is identical to the one above, but the link for 'Acklands - Grainger Inc (1) Test Punchout Catalogue' is circled in red to highlight it as the recommended choice.

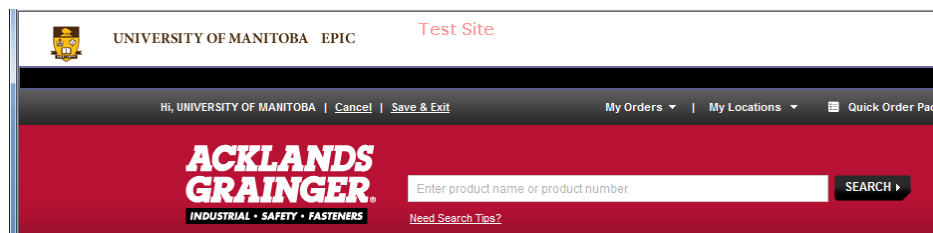
You will be redirected the Acklands Grainger catalog which appears as a website



How do you know you are still in EPIC? The University of Manitoba and EPIC logo are displayed at the top of the screen, as well as your EPIC user name.

You will now need to navigate the Acklands Grainger website to locate the “tool” you are searching for.

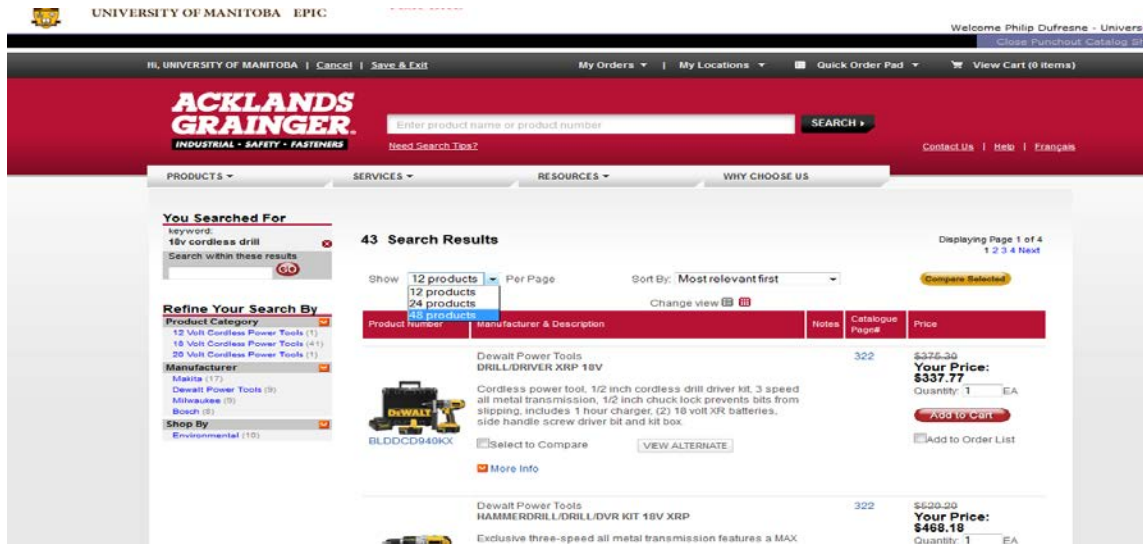
4. It is important to note that every supplier has a different layout, and catalog system which can vary. Locate the search box. In this case it is located at the top of the Acklands website.



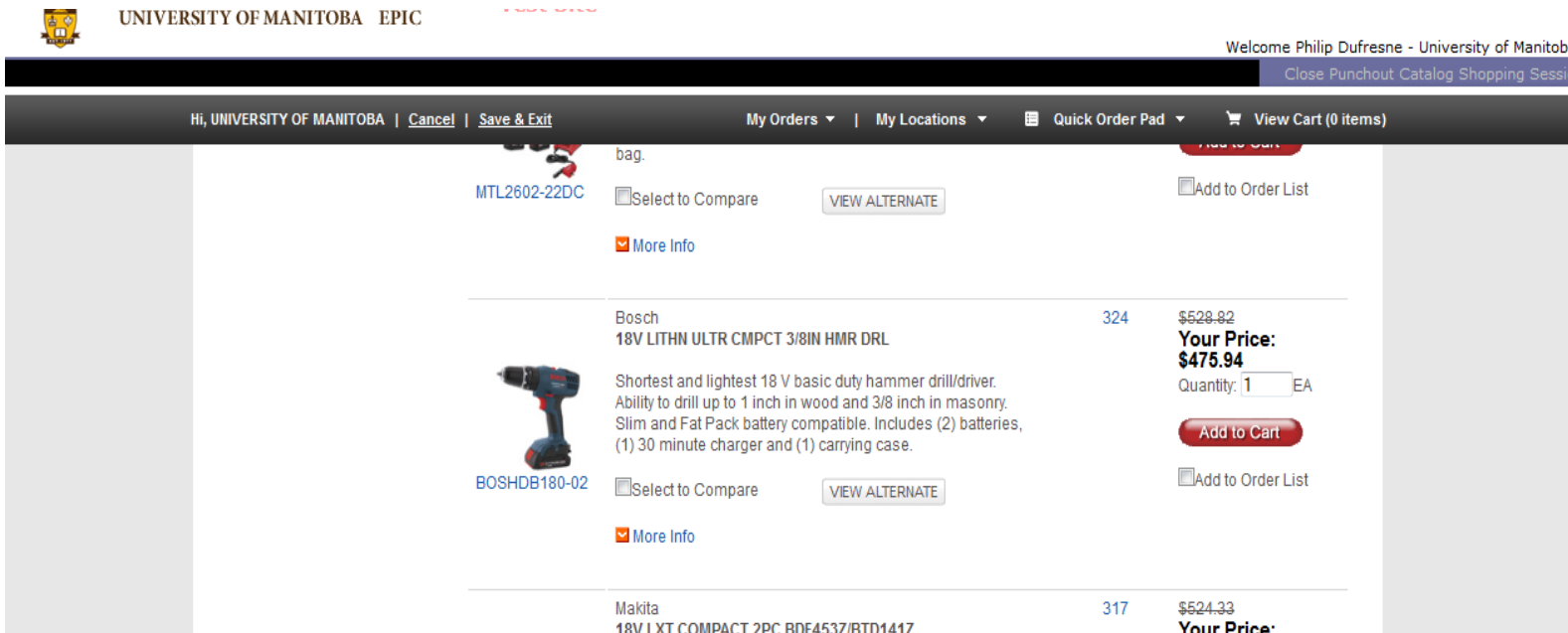
5. Specifically type the name of the tool you are looking for. For example: “18V Cordless Drill” and click **SEARCH**.



Your search results will be displayed. Many supplier catalogs offer different options for displaying content on their websites. For this example, Select “12 products” beside **SHOW** then select “48 products” per page.



6. Scroll down the search results and locate the type of drill you are looking to purchase. For example: **Bosch 18V LITHN ULTR CMPCT 3/8IN HMR DRL**



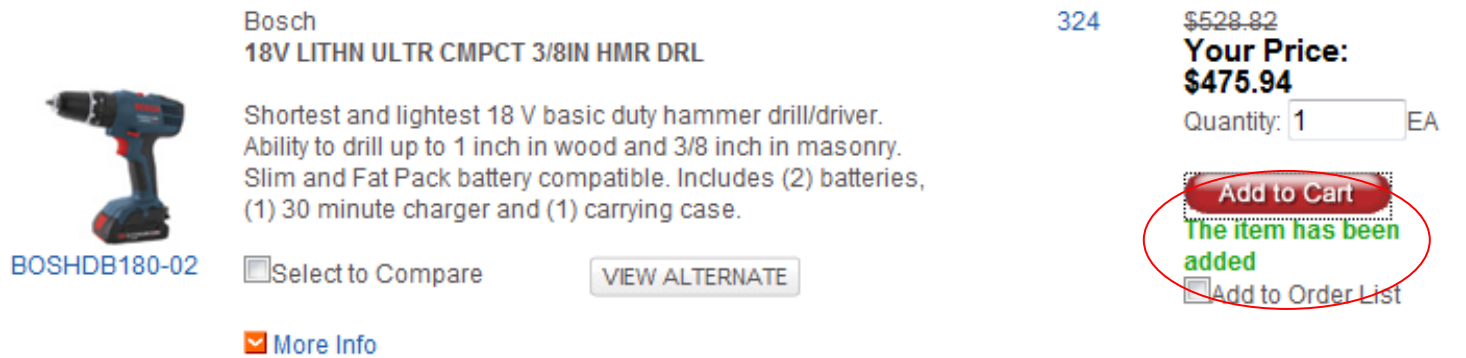
7. Once you are satisfied with the item and have decided to continue with the purchase, click **Add to Cart**. Some websites will allow you to adjust quantity amounts at this stage.



Many suppliers have additional product information available. For this example you can gain more information on the item by clicking the **More Info** downward arrow.



Once you have added the item to your cart, you should get some form of confirmation that your item has been added. In this example, your page will refresh and “The item has been added” will appear on your screen below the **Add to Cart** button.



Bosch
18V LITHN ULTR CMPCT 3/8IN HMR DRL

Shortest and lightest 18 V basic duty hammer drill/driver.
Ability to drill up to 1 inch in wood and 3/8 inch in masonry.
Slim and Fat Pack battery compatible. Includes (2) batteries,
(1) 30 minute charger and (1) carrying case.

324 \$528.82
Your Price:
\$475.94
Quantity: 1 EA

Add to Cart
The item has been added
 Add to Order List

Select to Compare

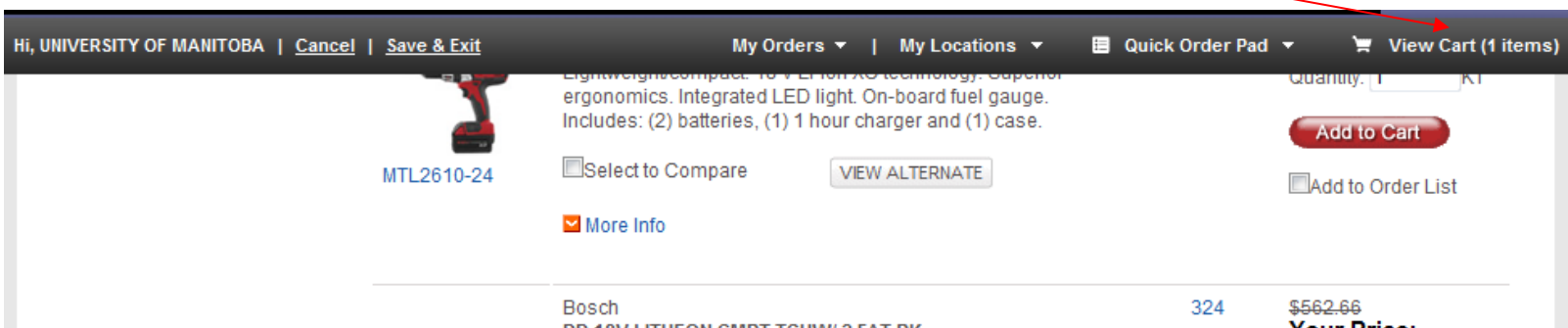
More Info




For the catalog items, the U of M pricing is already in place and displayed in the catalog. In this case you will see the original price crossed out and the **Your Price** option will be showing. The “**Your Price**” option is based on the negotiated pricing already in place with this supplier that the University of Manitoba has secured.

If you are only in need of 1 item from the Aklands Grainger catalog, you can proceed to checkout. If you would like to search for additional items, complete the same process starting at the Aklands homepage and the search functionality.

8. Located somewhere on the page there should be a “View Cart” option or a similar option. For this example, you will see a dark grey banner at the top of the page, with “Hi, University of Manitoba.” Click the **View Cart** link.



Hi, UNIVERSITY OF MANITOBA | [Cancel](#) | [Save & Exit](#) | [My Orders](#) | [My Locations](#) | [Quick Order Pad](#) | [View Cart \(1 items\)](#)


MTL2610-24

Lightweight compact 18V Lithium Ultracompact 3/8 inch Hammer Drill with superior ergonomics. Integrated LED light. On-board fuel gauge.
Includes: (2) batteries, (1) 1 hour charger and (1) case.

324 \$562.66
Your Price:
\$475.94
Quantity: 1 EA

Add to Cart
 Add to Order List

Select to Compare

More Info

You will be redirected to a new page displaying your total order, in this example titled “**Order Cart**”. Here you will find various order details such as QTY, Product Number, Description, Manufacturer, Unit of Measure, Your Price, & the Extended Price.

Hi, UNIVERSITY OF MANITOBA | [Cancel](#) | [Save & Exit](#) | My Orders | My Locations | Quick Order Pad | View Cart (1 items)

Order Cart

To add additional items, you can search, browse the catalogue or enter your product numbers right here. Any items updated with a quantity of "0" will be removed from your order. Note that whenever you leave the process(or this website) the contents of your order will be saved.

CURRENT ORDER

Add Another Product

Quantity Product Number [ADD TO CART](#)

Order Details

QTY.	Product Number	Description	Manufacturer	Unit of Measure	Your Price *	Extended Price	Remove
<input type="text" value="1"/>	BOSHDB180-02	18V LITHN ULTR CMPCT 3/8IN HMR DRL	Bosch	EA	\$475.94	\$475.94	✕

Sub-Total: \$475.94

[ADD TO ORDER LIST](#) [CLEAR CART](#) [UPDATE CART ▶](#)

- Review your cart to ensure the product listed is accurate as well as the QTY of items. Once you are satisfied with your order, click **Proceed to Checkout** (or a similar button which varies depending on the site)

Order Details

QTY.	Product Number	Description	Manufacturer	Unit of Measure	Your Price *	Extended Price	Remove
<input type="text" value="1"/>	BOSHDB180-02	18V LITHN ULTR CMPCT 3/8IN HMR DRL	Bosch	EA	\$475.94	\$475.94	✕

Sub-Total: \$475.94

[ADD TO ORDER LIST](#) [CLEAR CART](#) [UPDATE CART ▶](#)

[PROCEED TO CHECKOUT](#)

You will be redirected to a checkout page or in this case the **Cart- Check Out** page where you will have the opportunity to conduct a final review of your goods prior to finalizing your order.

Cart - Check Out

To add additional items, you can search, browse the catalogue or enter product numbers right here. Any items updated with a quantity of "0" will be removed from your order. Please remember that you will need to be registered and logged-in before making a purchase. Also note that whenever you need to leave (or this web site) the contents of your order will be saved.

ORDER DETAILS

QTY.	Product Number	Description	Manufacturer	Your Price *	Extended Price
1	BOSHDB180-02	18V LITHN ULTR CMPCT 3/8IN HMR DRL	Bosch	\$475.94	\$475.94

[EDIT CART](#)

[SUBMIT TO PROCUREMENT SYSTEM](#)

By clicking "SUBMIT TO PROCUREMENT SYSTEM" you have agreed to the Terms & Conditions of Sales as listed [here](#).

- Once you are satisfied with your order, click **Submit to Procurement System** or a similar button which varies depending on the site.

[EDIT CART](#)

[SUBMIT TO PROCUREMENT SYSTEM](#)

The exchange between EPIC and the PunchOut catalog has just occurred and you are now redirected back into EPIC and returned to the EPIC requisition.

UNIVERSITY OF MANITOBA

EPIC
Test Site

[Home](#) | [Help](#) | [Logout](#)

[Home](#)
[Sourcing](#)
[Contracts](#)
[Procurement](#)
[Invoicing](#)
[Suppliers](#)

Welcome Leah Enright (rose33) - University of Manitoba

[Create](#)
[Search](#)
[Manage](#)
[Recent](#)
[Preferences](#)
[Community](#)

PR1723:

[Back to Catalog](#)
[Submit](#)
[Exit](#)

Review your requisition, make changes as necessary, and submit the request for approval.

Summary

Approval Flow

Title: *

Purchasing Unit: umanitoba

On Behalf Of: [Leah Enright \(rose33\)](#) ▼

Delay Purchase Until: 📅 ⓘ

Buyer: (no value) ▼

F.O.B Shipping Instructions: (no value) ▼

shipping instructions:

My Labels: [Apply Label...](#) ⓘ

Line Items (1)
[Show Details](#) 📄

<input checked="" type="checkbox"/>	No.	Type	Description	Qty	Unit	Price	Amount

11. Complete the required fields as described in the Creating a Local Catalog Requisition section.



Even though this requisition started with a PunchOut request, you are able to add to the same requisition by accessing other items in any catalog or by adding a non-catalog item. Click on the buttons below and you will be redirected.

shipping instructions.

My Labels: [Apply Label...](#)

No.	Type	Description	Qty	Unit	Price	Amount
1	<input checked="" type="checkbox"/>	18V LITHN ULTR CMPCT 3/8IN HMR DRL	1	each	\$475.94 CAD	\$475.94 CAD

Total Cost: \$475.94 CAD
[Update Total](#)

Creating a Non-Catalog Request

When you order items from a catalog, EPIC obtains all the information about the items from the catalog. When you cannot find what you are looking for, you can add a non-catalog item to your purchase requisition. In this case, the system prompts you for the price, commodity code, and item description. All other fields are optional.

When creating a non-catalog item it is important to obtain the detailed information and pricing from a supplier to ensure that the items you receive are accurate. At any time if you are not sure what supplier can provide goods or services or the pricing you can contact Purchasing Services for assistance in sourcing the items.

To add a non-catalog item, follow the steps outlined below:

1. From the Home tab, select **Search Catalog**

EPIC Test Site Home | Help | Logout

Welcome Leah Enright (rose33) - University of Manitoba

Search Catalog

Keywords: Search

- Office Products (270)**
 - Grand and Toy Punchout Catalog for University of at Grand & Toy Ltd
 - Office Supplies (91)
 - Miscellaneous Computer Accessories (130)
 - More ...
- Maintenance, Repair and Operations (54)**
 - Test Punchout Catalogue at Acklands - Grainger Inc
 - Miscellaneous Hand Tools (9)
 - Miscellaneous Building and Construction and Maintenance Services (1)
 - More ...
- Computers and IT equipment (219)**
 - Hardware and Peripherals (36)
 - Industry Specific Software (39)
 - Components for Information Technology or Telecommunications (4)
- Books, Forms and Printed Media**
 - Miscellaneous Printed Publications (1)
- Miscellaneous (2)**
 - Miscellaneous Developmental and Professional Teaching Aids and Materials and Accessories and Supplies (2)
- Machinery and Tools (4160)**
 - Miscellaneous Building and Construction Machinery and Accessories (1)
 - Industrial Process Machinery and Equipment and Supplies (1)
 - Material Handling and Conditioning and Storage Machinery and Their Accessories and Supplies (9)
 - More ...
- Raw Materials (295)**
 - Medical Equipment and Accessories and Supplies (5)
 - Gaseous Fuels and Additives (6)
 - Chemicals Including Bio Chemicals and Gas Materials (283)

2. Perform a search for the desired goods or service by entering the description of the item you are looking for. For example: **Manitoba Horticultural textbook.**

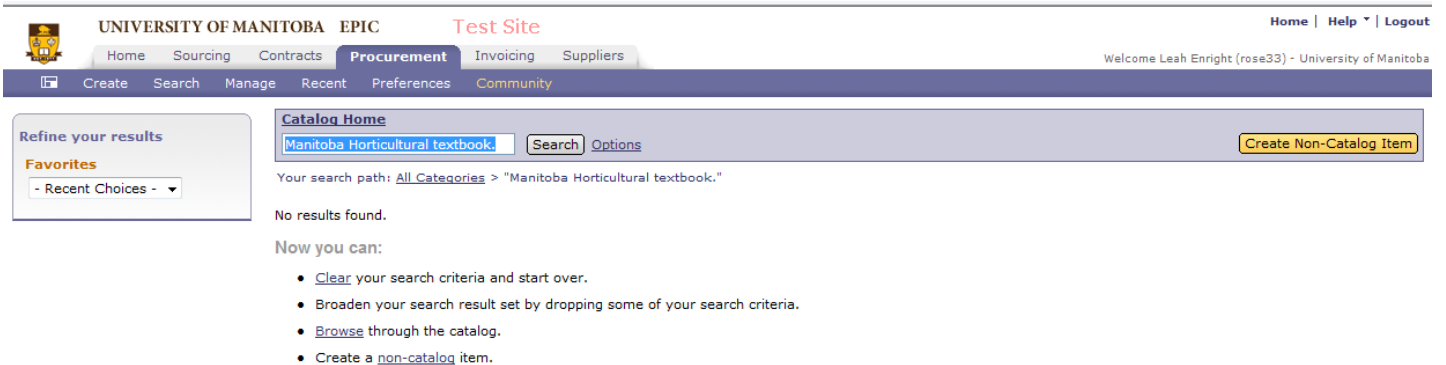


The screenshot shows a search bar with the text "Manitoba Horticultural textbook." entered. To the right of the search bar is a "Search" button. Above the search bar, the word "Catalog" is visible. The search bar is part of a larger interface with a blue header.

3. You will be redirected to a new page, which will indicate that there were no results found within the catalogs for your item. Try refining your search using less specific keywords to try and find the desired item. The above catalog categories may also aid in finding the item.



This search will look at both local and PunchOut Catalogs.



The screenshot shows the University of Manitoba EPIC Procurement Test Site. The search bar contains "Manitoba Horticultural textbook." and the search results indicate "No results found." Below this, there is a "Now you can:" section with four bullet points: "Clear your search criteria and start over.", "Broaden your search result set by dropping some of your search criteria.", "Browse through the catalog.", and "Create a non-catalog item." The "Create a non-catalog item." option is highlighted with a red circle.

4. This page will present you with a view options under the **Now you can:** header. If you continue to struggle finding the desired item after you refine your search you can create a non-catalog item. Click the 4th option, **“Create a non-catalog item.”**

Now you can:

- [Clear](#) your search criteria and start over.
- Broaden your search result set by dropping some of your search criteria.
- [Browse](#) through the catalog.
- Create a [non-catalog](#) item.

You will be redirected to a new page where you will be required to add details on the item you wish to purchase. A requisition number will be assigned to your request.

- As requested in the “Full Description” field, enter a description for your item. For example: Manitoba Horticulture Textbook 2011, Author: R. Smith, Publisher: McGraw-Hill

IMPORTANT: the Full Description field is your opportunity to provide the details of your required goods or service to the supplier. To ensure accuracy in your order provide as much detail as possible. The **Supplier field must be filled in**, despite not indicating that it is a required field. Any request without a supplier entered will receive bounceback errors once approval on the request is made. If you can't find the supplier, try shortening your search. If the supplier is still not listed, complete the “New Supplier Request” form located on the EPIC UofM homepage at www.umanitoba.ca/eprocurement

- Click the drop down arrow beside the “Commodity Code” field, select **Search for more...**

- A search box will be displayed. Search for Textbook.

- Results will be displayed within the same search box.
- Choose which of the results suits your needs. For example: Educational or vocational textbooks.
- Click “Select” next to your choice.

You will be redirected to the Purchase Requisition- add details page.



The Commodity Code field will now be populated. Commodity codes are used to identify what is being purchased at the University and provide valuable reporting information to Purchasing Services to ensure that future contracts are created to increase catalog availability in EPIC.

7. You are required to fill in the quantity, and unit of measure fields, but can optionally fill in the supplier part number and supplier part auxiliary ID fields if you have the information. By providing this information to the supplier the accuracy of the goods or service received will be higher.
8. Search for the Supplier using the same method described above when searching for the commodity code. *This search is not case sensitive.*
9. Add the price of the item within the Price field. For example: \$21.65
Ensure this Total has been confirmed with supplier and is not just an estimated amount.

If you cannot locate the item you want in the catalog, request a non-catalog item using the fields below. Non-catalog items may take longer to process because your purchasing department may get ...

Full Description: *	<input type="text" value="Manitoba Horticulture Textbook 2011"/>	Supplier:	<input type="text" value="Blackwell Publishers"/>
Commodity Code: *	<input type="text" value="Educational or vocation"/>	Contact:	<input type="text" value="Blackwell Publishers [select]"/>
Account Type: *	<input type="text" value="Expense"/>	Collaborate with supplier(s) for this item:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Supplier Part Number:	<input type="text"/>	Quantity:	<input type="text" value="25"/>
Supplier Auxiliary Part ID:	<input type="text"/>	Unit of Measure:	<input type="text" value="each"/>
		Price: *	<input type="text" value="\$21.65"/> CAD
		Amount:	\$541.25 CAD

- Click **Update Total** in the right hand corner of the screen and the total Amount will be updated to reflect the quantity and price.

- Once you are satisfied with the information you have entered, click “OK.”

You will be redirected to a new page where you will be able to edit at the line item for each item you have included on your requisition. This page will allow you to enter the FOP information required for each item.

PR1820: [Back to Catalog](#) [Checkout](#)

These are the items you have added to your requisition. You can edit, copy, or delete selected line items, and add new line items. If you change any values, update the total. ...

No.	Type	Description	Qty	Unit	Price	Amount
1		Manitoba Horticulture Textbook 2011	25	each	\$21.65 CAD	\$541.25 CAD

[Edit](#) [Copy](#) [Delete](#) | [Add from Catalog...](#) [Add Non-Catalog Item...](#)

Total Cost: **\$541.25 CAD**
[Update Total](#)

Don't show this page again after adding item(s)(reset in preferences).

[Back to Catalog](#) [Checkout](#)

10. Click the box next to your Manitoba Horticulture Textbook 2011 so a check mark appears.

- Click **Edit**

You will be redirected to a new page where you will be able to enter Line Item Details including accounting and shipping information per item.

LINE ITEM DETAILS

There are 5 problems that require completion or correction. Mouse over the red icons to learn more. Use the *Next* and *Prev* buttons to navigate between the errors as needed.

No.: 1

Description: Manitoba Horticulture Textbook 2011

Supplier Part Number:

Supplier Auxiliary Part ID:

Qty: 25

UOM: each

Amount: \$541.25 CAD

Price: \$21.65 CAD

Commodity Code: Educational or vocational

Supplier: Blackwell Publishers

Contact: Blackwell Publishers [select]

ACCOUNTING - BY LINE ITEM

Account Type: Expense

Bill To: * Supplier Payment Servi



Your **Line Item Details** should be populated as you entered them on the previous page.

11. Your accounting will default based on your profile however can be changed. Within the **Accounting- by Line Item** section, type in your **Fund** code. For example: 300579. Type in the **Organization** code. For example: 352016

- Enter the Account code
- Type in the Program code

ACCOUNTING - BY LINE ITEM

Account Type: Expense ▾

Bill To: * Supplier Payment Servi ▾

Fund: 300579 - DELTA WATER ▾

Organization: 352016 - Delta Field Sta ▾

Account: 706711-Teaching Suppli ▾

Program: 2000-Sponsored Resear ▾

Activity: (none selected) ▾

Location: (none selected) ▾

[Split Accounting](#)

Once you have completed the required information within the page, **click OK** in the bottom right hand corner.

You will be directed back to the page with all the information on your purchase. Scan the page for any inconsistencies or discrepancies.

The screenshot shows the University of Manitoba EPIC Procurement interface. The top navigation bar includes 'Home', 'Sourcing', 'Contracts', 'Procurement', 'Invoicing', and 'Suppliers'. The 'Procurement' tab is active. Below the navigation bar, there are buttons for 'Create', 'Search', 'Manage', 'Recent', 'Preferences', and 'Community'. The main content area displays a requisition for 'Manitoba Horticulture Textbook 2011' with a quantity of 25, a unit price of \$21.65 CAD, and a total amount of \$541.25 CAD. A 'Total Cost: \$541.25 CAD' box is visible on the right, with an 'Update Total' button. At the bottom right, there are 'Back to Catalog' and 'Checkout' buttons.

UNIVERSITY OF MANITOBA EPIC Test Site

Home | Help ▾ | Logou

Home Sourcing Contracts **Procurement** Invoicing Suppliers

Welcome Leah Enright (rose33) - University of Manitob

Create Search Manage Recent Preferences Community

PR1820: [Back to Catalog](#) [Checkout](#)

These are the items you have added to your requisition. You can edit, copy, or delete selected line items, and add new line items. If you change any values, update the total. ... ▾

[Show Details](#)

No.	Type	Description	Qty	Unit	Price	Amount
1		Manitoba Horticulture Textbook 2011	25	each	\$21.65 CAD	\$541.25 CAD

[Edit](#) [Copy](#) [Delete](#) | [Add from Catalog...](#) [Add Non-Catalog Item...](#)

Total Cost: \$541.25 CAD [Update Total](#)

Don't show this page again after adding item(s)(reset in preferences).

[Back to Catalog](#) [Checkout](#)

12. Once you are satisfied with your order, click **Checkout**.

You will be directed to the **Summary page** of your order. Here you are able to add Header details to your request.

PR1820: Back to Catalog Submit Exit

Review your requisition, make changes as necessary, and submit the request for approval.

Summary Approval Flow

Title: *

Purchasing Unit: umanitoba

On Behalf Of: Leah Enright (rose33)

Delay Purchase Until:

Buyer: (no value)

F.O.B Shipping Instructions: (no value)

shipping instructions:

My Labels: Apply Label...

No.	Type	Description	Qty	Unit	Price	Amount
1		Manitoba Horticulture Textbook 2011	25	each	\$21.65 CAD	\$541.25 CAD

13. For future reference, add an appropriate **Request title** for the request. For Example:
Nursing: Textbooks for Prof. Hewitt.
 - The **On Behalf Of** field will indicate your own name, if this needs to be changed, search for the appropriate individual who you are placing the order on behalf of. This is the individual whom the goods or services are for. The individual listed in this field will be responsible to enter receiving and review variances on invoices if any apply
14. **Delay Purchase Until** field – leave blank, unless you don't want the item to be shipped immediately.
15. **Buyer** and **F.O.B. Shipping Instruction** fields – leave blank, to be filled out by Purchasing Services if necessary.
16. Scroll down and add the **Ship to information**. This ship to code will be taken from the profile preferences from whomever is indicated in the "On behalf of" field added at the top of the form – this field can be changed by the preparer. Also add the **Need by** date if the item is required by a particular deadline. Ensure that you don't put the current date in this field as EPIC will recognize that the order can not be shipped by that date and create errors which will prevent a Purchase Order from being created.

SHIPPING - ENTIRE REQUISITION

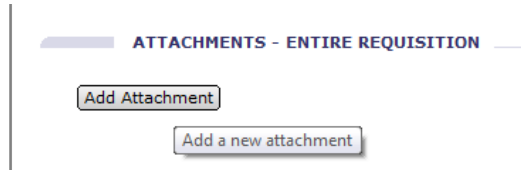
Ship To: * Agriculture Canada

Deliver To: * Leah Enright

Need-by Date: * Wed, 25 Jul, 2012

You have the option of including attachments related to your order. For non-catalog items, provide the suppliers quote you have received or the details of where the pricing information was obtained. For items valued over \$2500 and up to \$24,999 (after taxes) the University of Manitoba Purchasing policy & procedures requires 3 quotes to be submitted with the requisition.

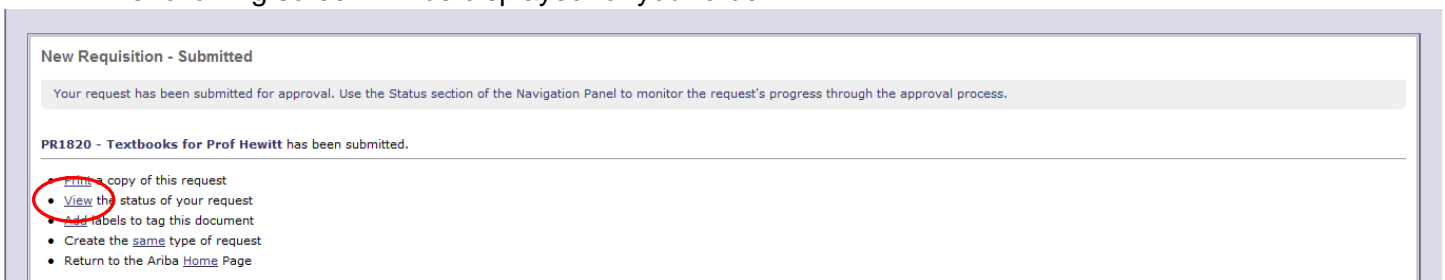
You can do this by clicking **Add attachment** at the bottom of the page and following the on screen instructions.



Once you are satisfied with your order, click **Submit**.

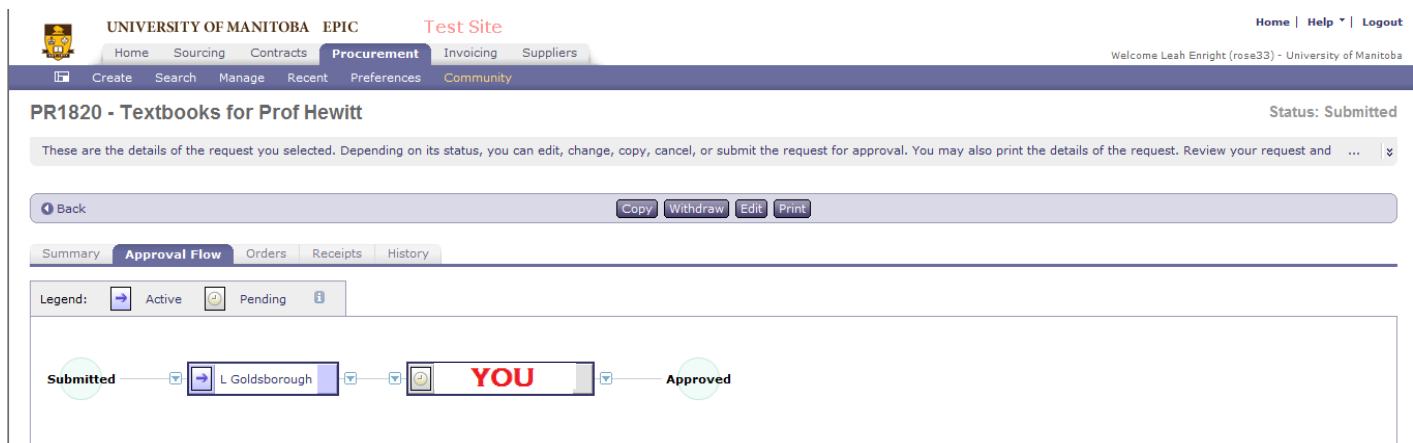


The following screen will be displayed for your order:



If you would like to view the status of your order, particularly the Approval flow, click **View** out of the options.

The approval flow will be displayed like the example below:



- The signing authority on the selected FOP is displayed. The individual will need to approve the request before your order can proceed.
- Fund approvers are added to the flow for research related approvals
- You can hover your mouse over any of the approvers and an explanation will appear as to why those users have been added to the approval flow.



When you are displayed as the final approver, the selected supplier is not an enabled supplier meaning that we are not set up to transact with them electronically and you will need to email or fax the purchase order to the supplier once it is fully approved. The notification you will receive in your email will identify the supplier you need to send the order to.

Managing Requisitions

You can edit a requisition that has a status of Composing or Submitted. You can withdraw a requisition that is in Submitted and then edit or delete it. Approvers may also edit a requisition through the approval flow.

Requisitions can be withdrawn at any time during the approval process. After a requisition has been fully approved, it cannot be withdrawn. The only exception to this rule is that a requisition can be withdrawn if it has a hold date, and the hold date has not yet arrived.

A requisition returns to the status of Composing when it is withdrawn. When a request is withdrawn, the preparer may choose to edit and resubmit the requisition or delete the request

Edit a Request

You can edit a requisition that has a status of **Composing** or **Submitted**. You can withdraw a requisition that is in **Submitted** state, and then edit or delete it.

How to Edit a Request:

1. Locate Request to Edit

- Scroll down your home page screen and find the My Documents section. Select the appropriate request. For Example: **“Textbooks for Prof Hewitt”**.

OR

- If the document you are looking for isn't in the My Documents Section, click **Requisition** in **Search box on Home page**. Search by entering in the requisition **Title** or PR# in the **ID field**. Click **Search**.
- The search results page is where you can refine your search information if you are ever having trouble locating a requisition. If you remember the date or date range as to when the requisition was created, utilize the **Date Created** section of the page.

To Do					
ID	Date ↓	From	Status	Title	Required Action
No items					

My Documents				
ID	Title	Date ↓	Status	
PR1820	Textbooks for Prof Hewitt	7/10/2012	Submitted	
PR1482	Lab Supplies for Dr. Jenkins	6/20/2012	Submitted	

[View List ...](#) (2)

- Click on **Request Name** and the request is displayed

2. Begin Editing request

When a request has been selected to EDIT it is removed from the approval process and approvers will be notified. The requisitions will be re-routed to all required approvers regardless if they had already approved the original submission.

- Select **EDIT** at top of request screen
- Confirm EDIT – click **OK**



You can click the box if you do not want to be asked to confirm your edit every time you would like to edit a requisition. This can also be managed through your Profile set-up in the preferences menu.

3. You will be redirected to the requisition line item page where you can alter the information

- If you would like to edit information on a particular item, click the box to create a check mark next to the item to select the item.

Line Items (1)				Show Details			
No.	Type	Description	Qty	Unit	Price	Amount	
1		Manitoba Horticulture Textbook 2011	25	each	\$21.65 CAD	\$541.25 CAD	

Below the table are buttons: [Edit] [Copy] [Delete] | [Add from Catalog...] [Add Non-Catalog Item...]

- Click **EDIT** and complete the changes you require. Once you are finished, click **OK**.
- You are returned to summary of your requisition.

4. Once you are satisfied with your change, resubmit request

- Click **Submit**





- Your requisition is now re-submitted to the approval flow

How to Copy a Request:

1. Locate request to copy

- Scroll down your home page screen and find the My Documents section. Select the request you wish to **Copy**. For Example: “**Textbooks for Prof Hewitt**”. Ensure the ID is a PR beside the Title, and not a PO.

To Do						
ID	Date ↓	From	Status	Title	Required Action	
No items						

My Documents				
ID	Title	Date ↓	Status	
 PR1820	Textbooks for Prof Hewitt	7/10/2012	Submitted	
 PR1482	Lab Supplies for Dr. Jenkins	6/20/2012	Submitted	

[View List ...](#) (2)

OR

- On Home page click **Requisition** in **Search box**

Search	
Catalog	Title: <input type="text"/>
Requisition	ID: <input type="text"/> <input type="button" value="Search"/>
Purchase Order	
Receipt	
Charge Reconciliation	
PCard Charge	
More...	

Saved Searches
My Requisitions
Requisitions Approved By Me

- On this page you can either enter the title of the requisition, for example: **Textbooks for Prof Hewitt**” or if you made note of the Purchase Requisition it was assigned, For example **PR1820**, you can enter the number in the **ID field**
- Click **Search** and the search results page is displayed

UNIVERSITY OF MANITOBA EPIC Test Site										Home Help Logout
Home Sourcing Contracts Procurement Invoicing Suppliers			Welcome Leah Enright (rose33) - University of Manitoba							
Create Search Manage Recent Preferences Community										
Search Type: Requisition										
Change the search criteria or name, and then Search.										
Search Filters Search Options										
Title: <input type="text"/>		F.O.B Shipping Instructions: (select a value) [select]								
ID: PR1820		Requester: (select a value) [select]								
Buyer: (select a value) [select]		Status: No Choice								
Commodity Code: (select a value) [select]		Supplier (any line item): (select a value) [select]								
Date Created: Custom		From: Wed, 27 Jun, 2012		Total Cost: <input type="text"/>		To: <input type="text"/> CAD				
		To: Thu, 12 Jul, 2012								
<input type="button" value="Search"/> <input type="button" value="Reset"/> <input type="button" value="Save Search"/>										
Search Results Found 1 item										
<input type="checkbox"/>	↑	Type	ID	Title	Status	Date Created	Total	Buyer	F.O.B Shipping Instructions	
<input type="checkbox"/>			PR1820	Textbooks for Prof Hewitt	Submitted	10 Jul 2012	\$541.25 CAD	(no value)	(no value)	
Label Copy Delete										

- The search results page is where you can refine your search information if you are ever having trouble locating a requisition.
 - If you remember the date or date range as to when the requisition was created, utilize the **Date Created** section of the page.

2. Click on the request title you searched for and wish to copy # PR1820

- Previous request is displayed

UNIVERSITY OF MANITOBA EPIC Test Site

Home | Help | Logout

Welcome Leah Enright (rose33) - University of Manitoba

PR1820 - Textbooks for Prof Hewitt Status: Submitted

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your request ...

Back Copy Withdraw Edit Print

Summary Approval Flow Orders Receipts History

Title: Textbooks for Prof Hewitt
 Purchasing Unit: umanitoba
 Buyer: (no value)
 F.O.B Shipping Instructions: (no value)
 shipping instructions:
 My Labels: Apply Label...

No.	Type	Description	Qty	Unit	Price	Amount
1		Manitoba Horticulture Textbook 2011	25	each	\$21.65 CAD	\$541.25 CAD

- At the top of the screen, click **COPY**



When copying a request it is important to note that all PunchOut items will NOT transfer over into your new requisition. You will be required to add each PunchOut item manually.

- You will now be redirected to a new page where you can begin to create your new requisition. A new **Requisition Number** has been assigned to your request

PR1910: Copy of Textbooks for Prof Hewitt

Back to Catalog Submit Exit

Review your requisition, make changes as necessary, and submit the request for approval.

Summary Approval Flow

Title: Copy of Textbooks for Prof Hewitt

Purchasing Unit: umanitoba
 On Behalf Of: Leah Enright (rose33)
 Delay Purchase Until:
 Buyer: (no value)
 F.O.B Shipping Instructions: (no value)
 shipping instructions:
 My Labels: Apply Label...

No.	Type	Description	Qty	Unit	Price	Amount
1		Manitoba Horticulture Textbook 2011	25	each	\$21.65 CAD	\$541.25 CAD

3. Edit/ Create your New Requisition

- Change Title of the Requisition to meet your need for the new Req. **For example: Textbooks for Prof. Galley**

4. Edit Line item information

- To edit the details on the item, click the box next to the item to create a check mark.



If you want to just alter the Quantity of the textbooks, you can change from this screen by clicking in the white box and changing the QTY. Make sure to click **Update Total**.

- Click **Edit**

No.	Type	Description	Qty	Unit	Price	Amount
1		Manitoba Horticulture Textbook 2011	2,000	each	\$21.65 CAD	\$43,300.00 CAD

Total Cost: \$43,300.00 CAD
Update Total

- You will be redirected to the page where you can edit the details of your request.

PR1910: Textbooks for Prof Galley

There is 1 problem that requires completion or correction in order to complete your request.

This is a summary of the item you selected. Change any editable field, and save your changes.

LINE ITEM DETAILS

No.: 1

Description: Manitoba Horticulture Textbook 2011

Supplier Part Number:

Supplier Auxiliary Part ID:

Qty: 25

UOM: each

Amount: \$541.25 CAD

Price: \$21.65 CAD

Commodity Code: Educational or vocational

Supplier: Blackwell Publishers

Contact: Blackwell Publishers [select]

ACCOUNTING - BY LINE ITEM

- Make any of the necessary changes to create your new requisition.

- Once you are complete, Click **OK**



- You will be taken back to the Summary page where the Header information is displayed on your order.

- If you're satisfied with your new requisition, Click **Submit**.

5. Review Approval flow

- Click **VIEW**

New Requisition - Submitted

Your request has been submitted for approval. Use the Status section of the Navigation Panel to monitor the request's progress through the approval process.

PR1910 - Textbooks for Prof Galley has been submitted.

- Print a copy of this request
- **View** the status of your request
- Add labels to tag this document
- Create the same type of request
- Return to the Ariba Home Page

- Approval flow is displayed

PR1910 - Textbooks for Prof Galley Status: Submitted

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your request and ...

Back Copy Withdraw Edit Print

Summary **Approval Flow** Orders Receipts History

Legend: Active Pending

Submitted → L Goldsborough → Purchasing Services Requisition Queue → Leah Enright (rose33) → Approved

- Signing Authorities on selected FOP are displayed – one of these individuals will need to approve the request for it to proceed



Purchasing Services is added to the flow when a line item is equal or greater than \$2500 and for total orders over \$25,000 – a representative from Purchasing Services will be assigned your request for review. Purchasing Services will need to approve the request for it to proceed.

- YOU are displayed as final approver
 - Your selected supplier is not on the Ariba network and you will need to email or fax the order to the supplier once it is fully approved. The notification you would receive in your email will identify the supplier you need to send the order to.
 - When the selected supplier is on the Ariba network you WILL NOT be the final approver.
- Note in the top right hand corner, the request status is in **“Submitted”**

Withdraw a Request

Requisitions can be withdrawn at any time during the approval process. After a requisition has been fully approved, it cannot be withdrawn. The only exception to this rule is that a requisition can be withdrawn if it has a hold date, and the hold date has not yet arrived.

A requisition returns to the status of **Composing** when it is withdrawn. When a request is withdrawn, the preparer may choose to edit and resubmit the requisition or delete the request

How to Withdraw a Request:

1. Scroll down your home page screen and find the **My Documents** section.
 - Find the requisition you wish to withdraw. For example: “**Textbooks for Prof. Galley**”



ID	Title	Date ↓	Status
PR1910	Textbooks for Prof Galley	7/11/2012	Submitted
PR1909	Copy of Textbooks for Prof Hewitt	7/11/2012	Composing
PR1907	Copy of Textbooks for Prof Hewitt	7/11/2012	Composing
PR1820	Textbooks for Prof Hewitt	7/10/2012	Submitted
PR1482	Lab Supplies for Dr. Jenkins	6/20/2012	Submitted

- Click document title and the request is displayed



UNIVERSITY OF MANITOBA EPIC Test Site Home | Help | Logout

Home Sourcing Contracts **Procurement** Invoicing Suppliers

Welcome Leah Enright (rose33) - University of Manitoba

Create Search Manage Recent Preferences Community

PR1910 - Textbooks for Prof Galley

Status: Submitted

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your request ...

Back Copy Withdraw Edit Print

Summary Approval Flow Orders Receipts History

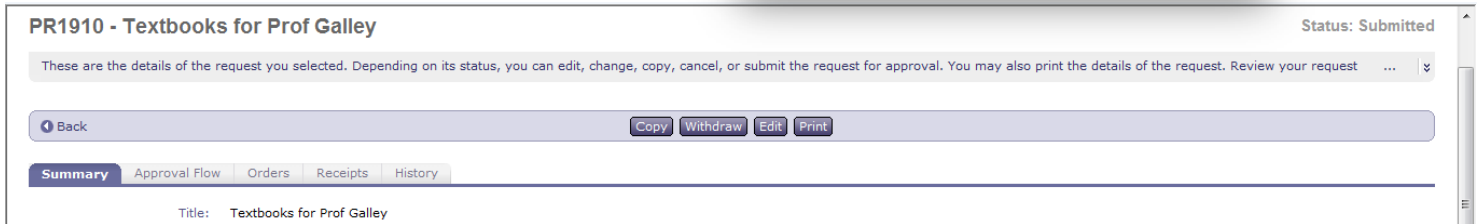
Title: Textbooks for Prof Galley
Purchasing Unit: umanitoba
Buyer: (no value)
F.O.B Shipping Instructions: (no value)
shipping instructions:
My Labels: [Apply Label...](#)

Line Items (1)

No.	Type	Description	Qty	Unit	Price	Amount
1		Manitoba Horticulture Textbook 2011	2,000	each	\$21.65 CAD	\$43,300.00 CAD

2. Withdraw request

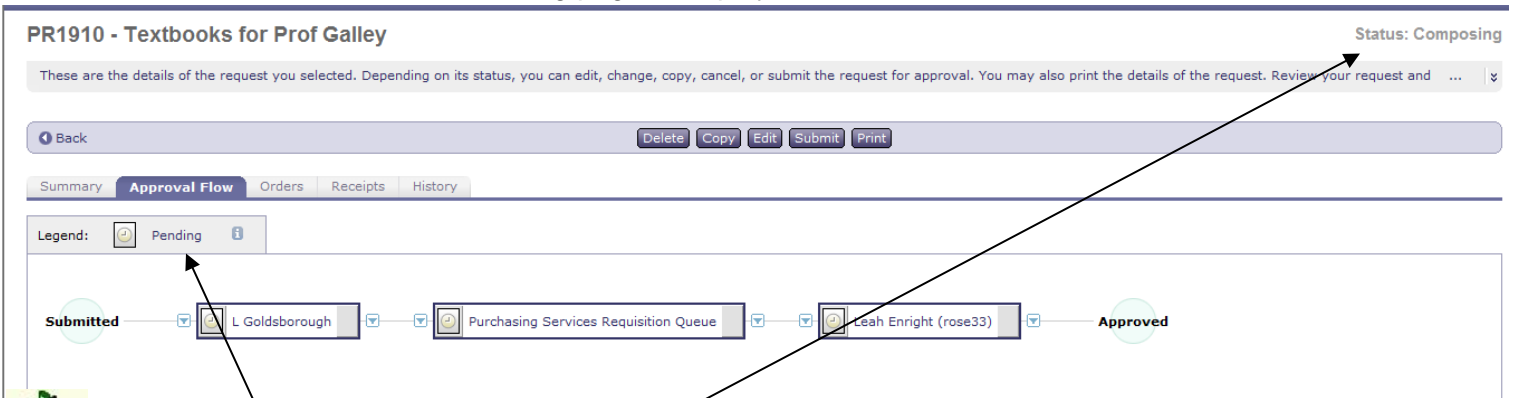
- At top of screen find **Withdraw** button



- Click **Withdraw** button
- Request is withdrawn and the following is displayed



- Click **View** and the following page is displayed.



The request has been reset to **Composing** status

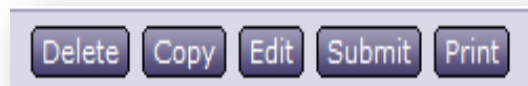
- Approvals are “on hold” pending further editing of request

How to Delete a Request:

1. Once you're in the Summary tab of the requisition like the example below, you can delete your request. *Ensure to Withdraw Requisition before Deleting.*

The screenshot shows the 'Summary' tab of a requisition. At the top right, the status is 'Compos'. Below the title, there is a navigation bar with buttons for 'Delete', 'Copy', 'Edit', 'Submit', and 'Print'. The main content area displays details for the requisition: Title: Textbooks for Prof Galley, Purchasing Unit: umanitoba, Buyer: (no value), F.O.B Shipping Instructions: (no value), shipping instructions: shipping instructions: My Labels: [Apply Label...](#) . Below this is a 'Line Items' table with one item: Manitoba Horticulture Textbook 2011, Qty: 2,000, Unit: each, Price: \$21.65 CAD, Amount: \$43,300.00 CAD. A 'Show Details' link and a 'Deta' button are also visible.

- Note options at top of page



2. Delete request

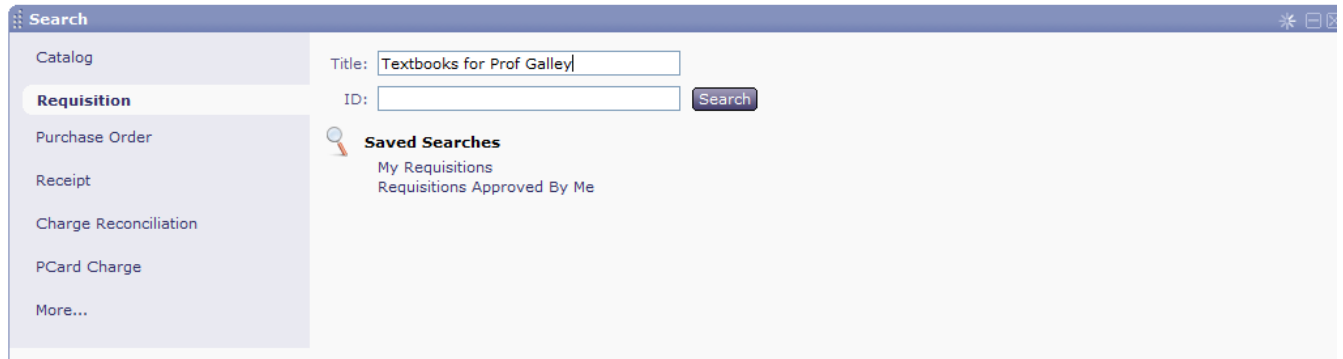
- Click Delete button
- Confirm Delete – the following message is displayed

The screenshot shows the 'Confirm Delete' dialog box. The header includes the University of Manitoba logo and 'EPIC Test Site'. The navigation bar shows 'Home', 'Sourcing', 'Contracts', 'Procurement', 'Invoicing', and 'Suppliers'. The main content area contains the text: 'Confirm that you want to delete the Requisition. You can hide this screen in the future by clicking the check box; to show the screen again, reset the default preference.' Below this is a checkbox labeled 'Don't show this page again (to reset, click **Preferences**).' At the bottom are 'OK' and 'Cancel' buttons.

- Click **OK** and you will be redirected back to the **Home page**.

3. Validate that your request has been deleted.

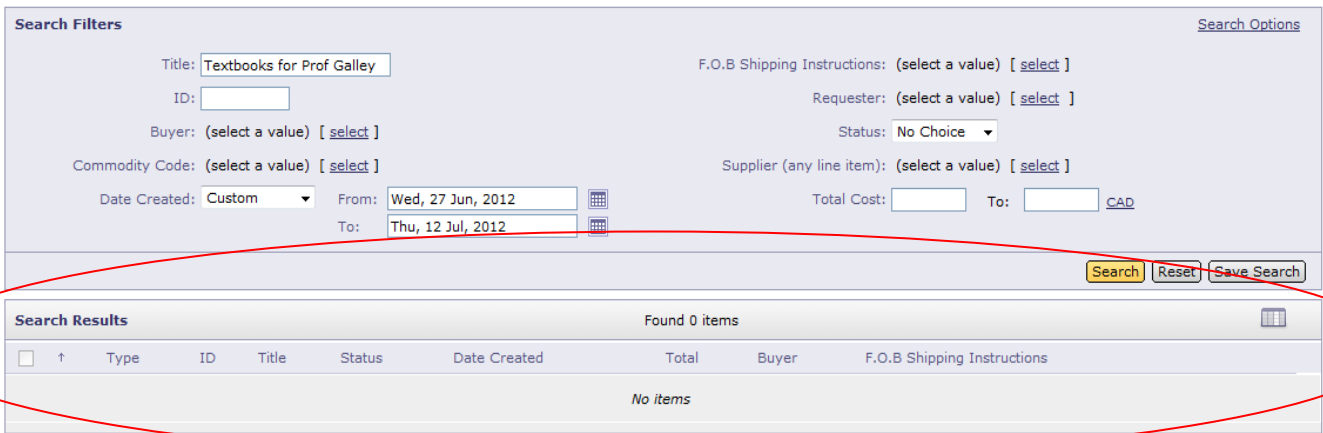
- Try searching for your request using the requisition search tool on the home page
 - Click Requisition on Search box
 - Enter requisition title and click **Search**



The screenshot shows a search interface with a sidebar on the left containing a list of categories: Catalog, Requisition, Purchase Order, Receipt, Charge Reconciliation, PCard Charge, and More... The 'Requisition' category is selected. The main search area has a 'Title' field containing 'Textbooks for Prof Galley' and an 'ID' field. A 'Search' button is located to the right of the ID field. Below the search fields, there is a 'Saved Searches' section with two options: 'My Requisitions' and 'Requisitions Approved By Me'.

- No results are retrieved

Change the search criteria or name, and then **Search**.



The screenshot shows the 'Search Filters' section with various search criteria: Title (Textbooks for Prof Galley), ID, Buyer, Commodity Code, Date Created (Custom), From (Wed, 27 Jun, 2012), To (Thu, 12 Jul, 2012), F.O.B Shipping Instructions, Requester, Status (No Choice), Supplier (any line item), and Total Cost. There are 'Search', 'Reset', and 'Save Search' buttons. Below the filters is the 'Search Results' section, which shows 'Found 0 items' and a table with columns: Type, ID, Title, Status, Date Created, Total, Buyer, and F.O.B Shipping Instructions. The table is empty, and the text 'No items' is displayed below it. A red oval highlights the 'Search Results' section.

- You can also check the **My Documents** box on the Home page for your document
 - Document cannot be found
- Your request has been successfully deleted

Collaborative Requisitioning

Collaborative requisitioning will be used through the approval process by Purchasing Services at go-live and allows them to negotiate with one or more suppliers on your behalf before a purchase order is generated. It opens the requisitioning process to proposals submitted by suppliers for lower prices, specific services, or items that better meet your needs.

After suppliers submit their proposals, Purchasing Services will review the proposals with you to select the proposal with the best overall value that meets your requirements..

Once a proposal is accepted the requisition will be routed to the signing authority and any other required approvers before the order is placed.

Budget Checking



At initial roll out- Budget Checking will not be enabled. Budget Checking will be enabled in the future.

Budget checking checks submitted requisitions against the FOP budget in the University Financial system.

Budget checking in EPIC ensures there is adequate money available in the selected accounting strings, and that it is reserved for requisitions when they are created. Requisitions can be submitted for approval only when the budget check is successful.

When budget checking is enabled, a new tab named “Budgets” will appear in each purchase requisition. This tab will provide the budget amount the requisition consumes and the remaining budget available. It also displays the time period during which the budget is active. i.e Fiscal year

Module 4: Non-PO Invoice Form

When to use a Non-PO Invoice Form

The Non-PO Invoice form in EPIC is available to submit invoices electronically to Supplier Payment Services for payment of invoices that do not have an associated Purchase Order or Contract ID within EPIC.

These invoices include charges for:

- Memberships
- Registrations
- Subscriptions
- Fees for:
 - Allowable professional license
 - Exhibitor
 - Abstract or manuscript submission
 - Reprint
 - Commission
- Page Charges
- Journals
- Directories
- Conference Fees (Payments to Supplier only)
- Permits
- Sponsorship Payments

Creating a Non-PO Invoice in EPIC

Required Steps

There are five (5) required steps to process a Non-PO invoice in EPIC:

- Step 1:** Enter Invoice Header Information
- Step 2:** Enter Line item details
- Step 3:** Review and Edit details (descriptions & commodities, accounting or pricing)
- Step 4:** Submit the invoice to the Approval process
- Step 5:** Send original paper documents to Supplier Payment Services

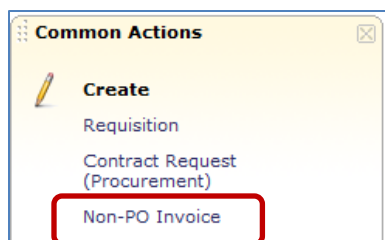
***** You are not required to enter Taxes, Shipping or Handling charges*****

How to create a Non-PO Invoice

To submit a Non-PO invoice, begin by logging into JUMP and selecting the EPIC link. In EPIC you can begin your request from the **Home tab** or from the **Invoicing Tab**

○ From the Home Tab

- Locate the **'Create'** section of the **'Common Actions'** list on the left side of the screen.
- Select **Non-PO Invoice**





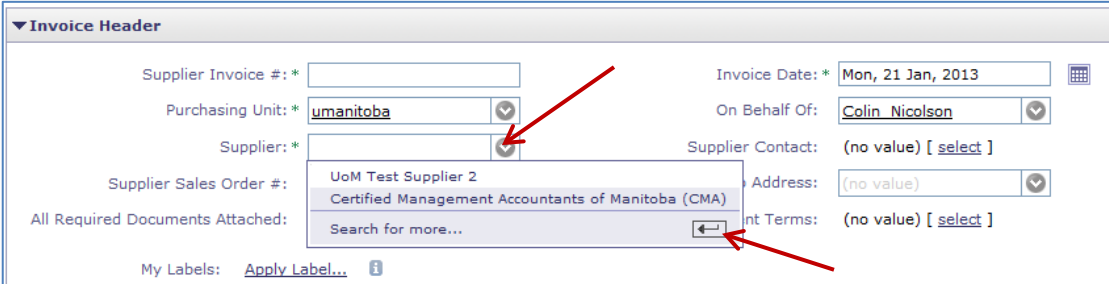
- OR select **'Create'** from the **'Manage'** menu on the blue tool bar and select **Non-PO Invoice**



- The Non-PO Invoice form is displayed.

Step 1: Enter Invoice Header Information

- Complete all required fields on the Invoice Header portion of the form as provided on the invoice paper copy.
- A green  indicates a required field throughout EPIC; all remaining fields are optional. It is recommended that you provide as much information as possible to Supplier Payment Services to avoid unnecessary delays.
- **Supplier Invoice #**
Enter the invoice number exactly as it appears on the paper copy of the invoice you are requesting payment for. If an invoice number is not present on the document, enter the date in the format “mmddy”
- **Purchasing Unit**
This will default to ‘umanitoba’
- **Supplier**
In the **Supplier** field, select the arrow to display the menu. You may select from the list of recently used suppliers or select ‘Search for more...’ to search for the required supplier by clicking on  icon.



The screenshot shows the 'Invoice Header' form. The 'Supplier' field is selected, and a dropdown menu is visible. The dropdown menu contains the following items: 'UoM Test Supplier 2', 'Certified Management Accountants of Manitoba (CMA)', and 'Search for more...'. A red arrow points to the dropdown arrow, and another red arrow points to the search icon in the dropdown menu.



The screenshot shows the 'Choose Value for Supplier' dialog box. The 'Supplier Name' field contains the text 'cma' and the 'Search' button is highlighted with a red box. A red arrow points to the 'Search' button. Below the search field is a list of suppliers with 'Select' buttons next to each name: 'ACMA Computers, Inc', 'CALAM/ACMAL', 'Certified Management Accountants of Manitoba (CMA)', 'McMaster University', and 'Tecmag'. A red arrow points to the 'Done' button at the bottom.

Search for the supplier by entering the name in the ‘Supplier Name’ field and clicking ‘Search’.

- When the supplier is found, click **'Select'** next to the name.
 - ✓ If the supplier does not exist in the search listing, please complete the new supplier request form and forward to supplier_support@umanitoba.ca for set up in BANNER.

- **Supplier Sales Order #**

This is not a required field. If the information exists on the invoice, please provide details in this field.

- **All Required Documents Attached**

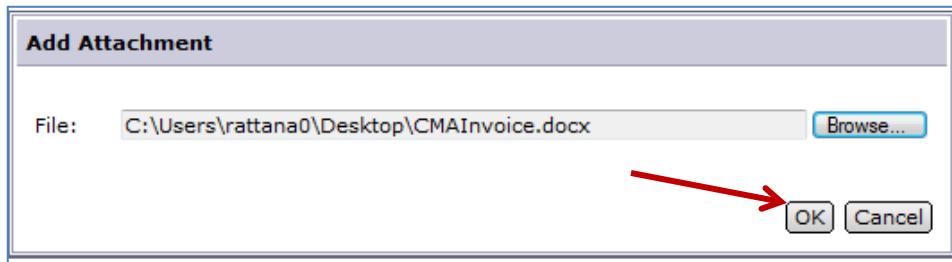
It is mandatory that all paper documents supporting the requested payment are scanned and attached to the **Non-PO Invoice** before it is submitted to the approval process in EPIC.

 - ✓ An **"EPIC Non PO Invoice Coversheet"** with the original invoice attached must be submitted to Supplier Payment Services before payment will be issued to the supplier. The link for the coversheet can be found on the Financial Services Forms webpage under EPIC.

- ✓ To add an attachment, select the arrow next to **'Header Actions'** and choose **'Attachment'** from the list.

The screenshot displays the 'Invoice Entry' form in the EPIC system. The 'Invoice Header' section includes fields for 'Supplier Invoice #', 'Purchasing Unit', 'Supplier', and 'Supplier Sales Order #'. Below these is a radio button for 'All Required Documents Attached' (set to 'No') and a 'My Labels' section. The 'Shipping - Entire Invoice' section has a 'Ship From' dropdown. The 'Header Actions' section is highlighted with a red arrow pointing to a dropdown menu. This menu lists options: 'Add', 'Tax', 'Shipping', 'Special Handling', 'Discount', 'Comment', and 'Attachment'. The 'Attachment' option is circled in red. Below the 'Header Actions' is a 'Line Items' table with columns for 'No.', 'Description', and 'Line Item Action'.

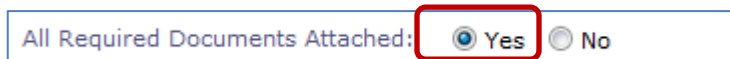
- ✓ Select '**Browse**' to search your computer for the scanned documentation you wish to attach. Once the attachment is chosen, click '**OK**'



- ✓ The **attachment will be added to the Invoice Header details** just above the 'Header Actions' line.



- ✓ Once the document has been attached, select '**Yes**' next to '**All Required Documents Attached**'.



- **Invoice Date**

Enter the invoice date as it appears on the paper copy invoice.

Note: If there is no date provided on the invoice, use the date the invoice is entered into EPIC and write this on the document before it is scanned and attached.

- **On Behalf Of**

The '**On Behalf Of**' field will default to the name of the individual entering the invoice.

If you are entering the invoice on behalf of someone else, select the down arrow next to the name in the 'On Behalf Of' field, to search for and select the appropriate name.

- **Supplier Contact-Remit to Address-Payment Terms-Ship From**

These fields will default from the supplier information in BANNER. Do not make changes to any of these fields.

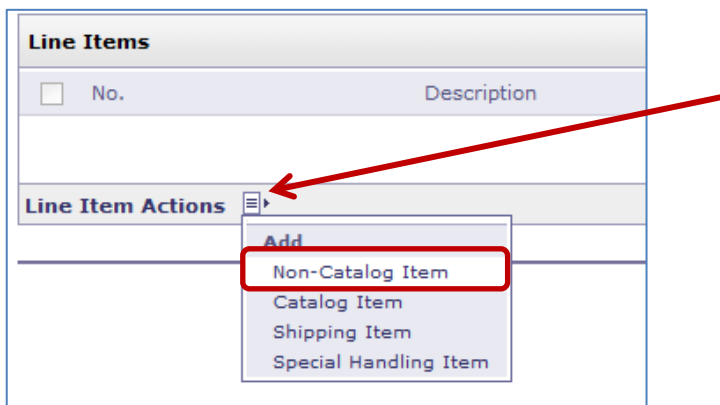
- **Ship To**

The ship to will default based on the information in your user preferences. If you have not selected a ship to or require a different address, click on the down arrow next to the field box to search for available addresses.

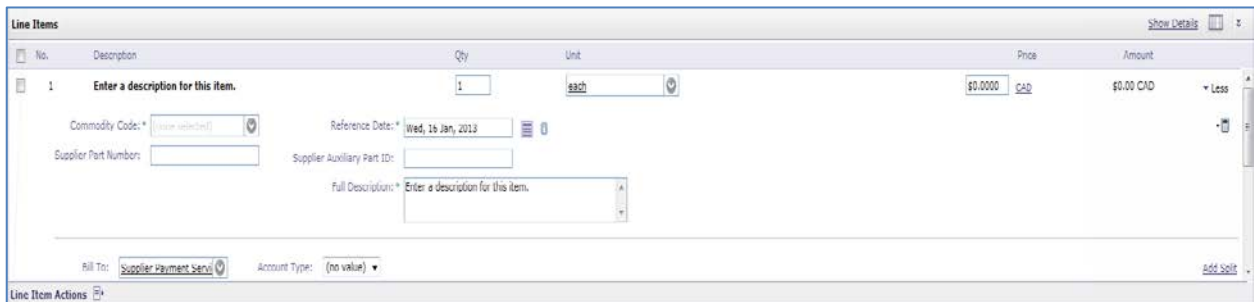


Step 2: Enter Line Item Details

- Once the Invoice Header information is complete, the **Line Item details** are required to be entered.
- To begin entering line item information, click on the arrow next to the **Line Item Actions**. A drop down menu is displayed
- From the menu, select **Non-Catalog item**.



- You can begin entering the **line item details** from the original invoice in the following fields.



- **Quantity**

Enter the quantity as displayed on the paper copy of the invoice

- **Unit**

Select the appropriate unit of measure code as given on the paper copy of the invoice

Note: When no unit of measure is identified on the invoice select **each (ea)**

- **Price**

Enter the **price per unit** as indicated on the invoice

Note: Price per unit is the cost of each individual item

- **Currency**

If the currency of the invoice is not Canadian Funds, select the down arrow next to **CAD** and click on '**other**' for the full listing of available currencies.

- **Commodity Code**

A commodity code must be selected that properly matches the description of the item that is being invoiced. Select the down arrow next to the **Commodity Code** field.

- ✓ Search & select a commodity code from the list of your commonly used commodities.

1 **Enter a description for this item.**

Commodity Code: * ▼

Supplier Part Number:

- Notebook computers
- Computer Equipment and Accessories
- Radioisotope sources
- Search for more...

- ✓ Select the 'Search for more...' icon to search for additional commodity codes. Click 'Select' next to the most appropriate code in the search.

Choose Value for Commodity Code

Field: Name ▾ accounting Search

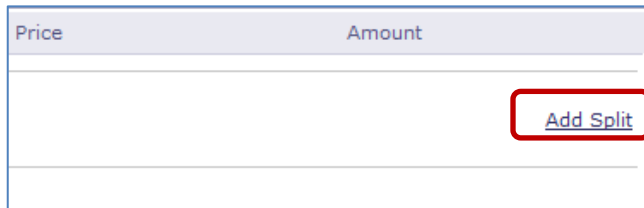
Name ↑	ID	
▶ Accounting and auditing	8411	Select
Accounting associations	94101604	Select
Accounting forms or accounting books	14111808	Select
Accounting machines	44101803	Select
▶ Finance accounting and enterprise resource planning ERP software	432316	Select
Government accounting services	93151606	Select
Telephone call accounting systems	43221509	Select

Done

- **Supplier Part Number**
Enter the Supplier part number from the invoice, if provided.
- **Reference Date**
This field will default to the invoice date in the header.
- **Supplier Auxiliary Part ID**
Optional field - This information can be entered if available on the suppliers invoice.
- **Full Description**
Enter the description of what is being invoiced **exactly** as communicated on the suppliers invoice
- **Bill To**
This will default to Supplier Payment Services and should not be changed
- **Account Type**
Default values are auto populated based on the GL account

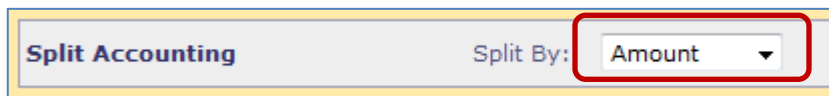
○ **Add Split**

- ✓ Split accounting can be executed against a number of different FOPs if required.
- ✓ You can choose to split by **Amount, Percent, or Quantity**
- ✓ If split accounting is required, click on '**Add Split**' in the far right of the line items box.



Price	Amount

- ✓ Select the split by Amount, Percent or Quantity



Split Accounting Split By: Amount ▾

- ✓ Once the split is added, you will have two lines requiring FOAPAL input as well as amount, percent, or quantity depending on the split by method chosen.
- ✓ Additional split lines can be added by clicking on '**Add Split**' again as needed.
- ✓ Split lines can also be removed by clicking on '**Remove**' in the far right of each split line.



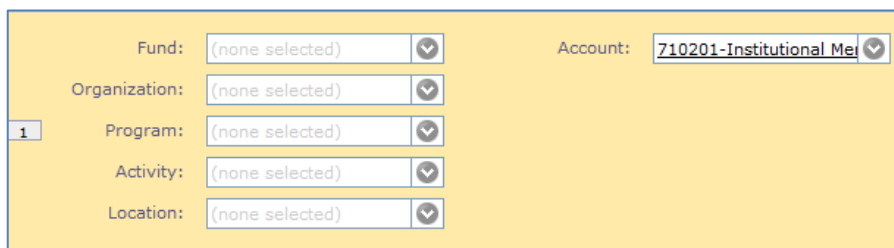
[Add Split](#) [Remove](#)

○ **FOAPAL**

The accounting fields will default based on your personal profile settings.

If your profile does not have a default, you must enter the FOAPAL required for the expenses to be charged. This must be done for each line.

Note: It is important to check and edit FOAPAL information on each line to avoid journal entry corrections.



Fund:	(none selected) ▾	Account:	710201-Institutional Me ▾
Organization:	(none selected) ▾		
1 Program:	(none selected) ▾		
Activity:	(none selected) ▾		
Location:	(none selected) ▾		

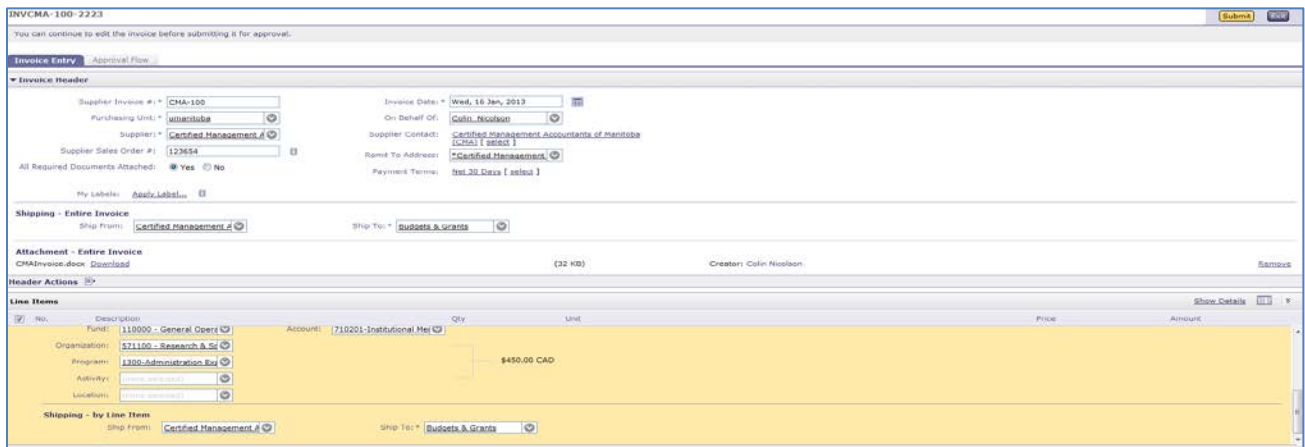
- ✓ The **Account field** will default based on the selected commodity code. If the account is incorrect, you still have the ability to change it by clicking on the down arrow next to the field and searching for the correct Account.

- **Ship From/Ship To**

These fields will default from the supplier information provided in the header section. No changes are required.

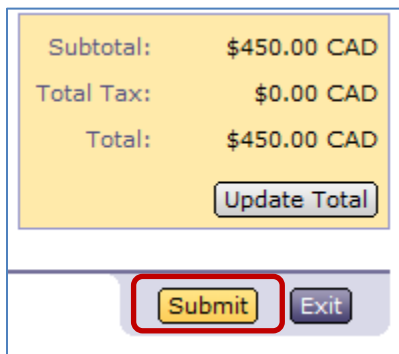
Step 3: Review and Edit details

- Once all the information has been entered, review both the **Invoice Header** and **Line Items**. Make any necessary changes.



Step 4: Submit the Invoice to the Approval process

- When you are satisfied the information is accurate **AND** you have attached the scanned documentation, you can **submit** the invoice to the approval process.



At the bottom of the invoice screen select '**Submit**'.

The invoice will be sent through the necessary approvals.

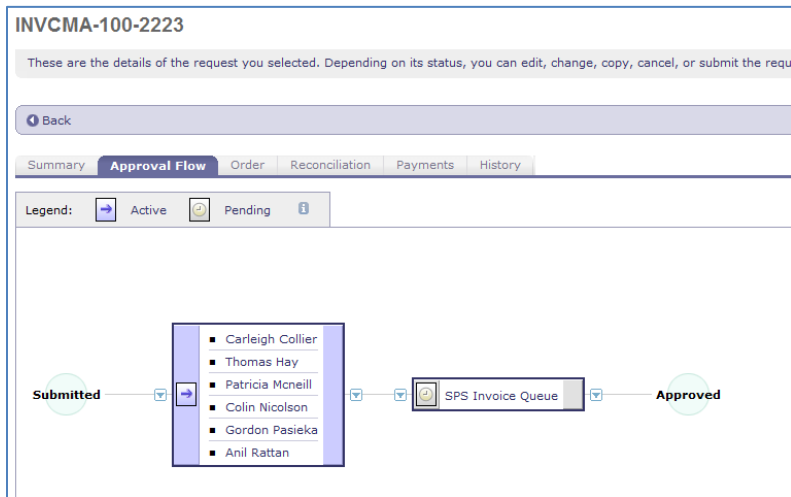
To view the approval flow of the submitted invoice, click on '**View**'

New Invoice - Submitted

Your request has been submitted for approval.

INVCMA-100-2223 has been submitted.

- [Print](#) a copy of this request
- [View](#) the status of your request
- [Add](#) labels to tag this document
- Create the [same](#) type of request
- Return to the Ariba [Home](#) Page



The Approval flow is displayed.

- Once the approvals of the signing authorities are completed, SPS will use the scanned information to enter taxes and any additional charges as originally invoiced.

Note: Additional approvals based on commodity could occur.

- When the Invoice is fully approved, it will enter the standard invoice reconciliation process. If there are any additional exceptions found during reconciliation, the appropriate handlers may take action to accept or dispute these.
 - At any stage, if the invoice is found to be incorrect i.e. does not match the scanned documentation or is not an permissible expense in EPIC, the invoice can be denied
 - ✓ The individual who originally entered the invoice will be notified that it was denied.
- To adjust the invoice, access the invoice document from your **My Documents box** on the Home tab
- Select **Edit** from the top of your screen




- Adjust the invoice as required.

- Once all corrections are complete, **Submit** the invoice to the approval process.
 - ✓ All required approvals will be reinitiated including signing authorities, commodity approvers and Supplier Payment Services.
- If your invoice has been permanently rejected as a non-permissible expense you can delete your request by selecting the **Delete** button at the top of the invoice screen.

Step 5: Send all original paper documents to Supplier Payment Services

- All original invoices must be mailed to Supplier Payment Services
- Original Invoices need to be attached to a fully completed *EPIC Non PO Invoice Cover Sheet* available on both the EPIC forms and Supplier Payment Services webpages


UNIVERSITY OF MANITOBA

EPIC NON-P.O. INVOICE COVER SHEET

Please complete and submit a hard copy of this cover sheet attached to the original invoice after entering and scanning the invoice into EPIC as a non-p.o. invoice. The original invoice entered must be submitted with this form and only one invoice per form can be accepted.

Questions? Contact Supplier Payment Services at 474-8033

Supplier Name: _____

Current Date: _____

EPIC Invoice ID: _____

Requestor Name: _____

Requestor Phone Number: _____

Requestor E-Mail: _____

Department: _____

* Please complete the information above and attach to original invoice before forwarding to:

Supplier Payment Services Department
412 Administration Building
Fort Garry Campus

* This form can be accessed through the EPIC "News" tab on the Home Dashboard or directly on the U of M website at: http://umanitoba.ca/admin/financial_services/secure/index.html

Note: If original documentation is not received, delays in payment may occur.

Approvals & Notifications

The required approvals on a Non-PO Invoice include your signing authority and Supplier Payment Services. Additional approvals may be required based on the commodity of the purchase.

Depending on their personal settings in EPIC, an approver can receive email notification for each Non-PO Invoice pending their approval.

The email allows the approver to **Approve**, **Deny** or **Open** (in EPIC) the expense directly from the message.

ACTION REQUIRED: INV4578-2349 (Supplier: Certified Management Accountants of Manitoba (CMA) Amount: \$300.00 CAD) (Approval Request)

Email Approval [buyerapproval-prod+umanitoba-T@ansmtp.ariba.com]

To: Christopher Bohonis [kristine_ward@umanitoba.ca] February 5, 2013 8:06 PM

- To help protect your privacy, some content in this message has been blocked. If you're sure this message is from a trusted sender and you want to re-enable the blocked features, [click here](#).

INV4578-2349 (Supplier: Certified Management Accountants of Manitoba (CMA) Amount: \$300.00 CAD) requires your action because: "Approval Required on all orders from Signing Authority."

Requester: Christopher Bohonis Created: 8:05 PM Tuesday, February 5, 2013 CST

Actions: Approve Deny Open

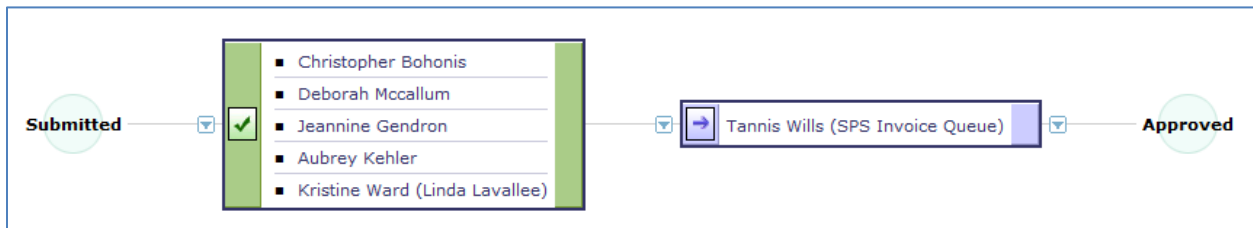
Supplier Invoice #	Supplier	Invoice Date
4578	Certified Management Accountants of Manitoba (CMA)	Tuesday, February 5, 2013

Line Items										
#	Description	Account Type	Qty	Unit	Price	Amount				
1	2013 Membership Fees for Linda	Expense	1.00	each	\$300.00 CAD	\$300.00 CAD				
	Program	Organization	Fund	Account	SubAccount	Activity	Location	Product	Type	Proportion
	1600-Physical Plant General Expenses	540100 - Security Services	110000 - General Operating Allocation	710201-Institutional Memberships					Percentage	100.00
						Total Amount: \$300.00 CAD				

Recent Comments

Approval flow

After the signing authority has approved the expenditure, your request is submitted to the Supplier Payment Services Invoice Queue to be assigned to an individual to review & process.



If you have your email notifications turned on for invoices, you will receive confirmation of each approval or denial as they occur in EPIC.

Module 5: Receiving

In EPIC, individual items over the value of \$2500 will require receiving in the system by the Requester (on behalf of user) listed on the requisition/order. Invoices processed against Purchase Orders will not be paid until receiving has been confirmed.

Adding Receiving

1. Locate Request for Receiving

- Scroll down your home page screen and find the To Do section. Find the RC ID along with the request name requiring receiving. For Example: “Beds for Residences”. Select “**Receive**” under the required action title.



The screenshot shows the EPIC Home Dashboard. At the top, there is a navigation bar with 'UNIVERSITY OF MANITOBA EPIC Test Site' and 'Home | Help | Logout'. Below this is a secondary navigation bar with 'Home', 'Sourcing', 'Contracts', 'Procurement', 'Invoicing', and 'Suppliers'. A welcome message for Philip Dufresne is visible. The main dashboard area includes a 'Common Actions' sidebar with 'Create' (Requisition, Contract Request) and 'Manage' (Receive, My To Do, My Tasks) options. A 'To Do' list is displayed with columns for ID, Date, From, Status, Title, and Required Action. The entry for 'RC1779' has a 'Receive' action circled in red.

ID	Date ↓	From	Status	Title	Required Action
RC1779	11/9/2012	Philip Dufresne	Composing	Beds for Residences	Receive

Note: You may need to drag the “To Do” box to top of page to view all options with wider view.

OR

- If the document you are looking for isn't in the To Do Section, Scroll down your home page screen and find the My Documents section. Select the request name requiring receiving. For Example: “**Beds for Residences**”.
- The search results page is where you can refine your search information if you are ever having trouble locating a requisition. If you remember the date or date range as to when the requisition was created, utilize the **Date Created** section of the page.
- Request is displayed
- Click **Receive** (or **Edit**) Icon at top of screen



- Receiving Steps page is displayed



Receipt document has been assigned

Receiving Steps: 1 Select Receipt, 2 Receive, 3 Additional Info, 4 Summary

Receipt RC277: PQ249 - Beds for Residences

Order ID: PQ249 Date: Mon, 28 May, 2012
 Order Title: Beds for Residences Processing Status: Receiving
 My Labels: [Add Label...](#)

No.	Quantity	Description	Unit	Supplier Part Number	Prev. Accepted	Prev. Rejected	Accepted	Rejected	Total Received	Date Received
1	100	Wood Twin Bed Frame w/ Pillow top Mattress	each	WTS-PM5698	0	0	<input type="text"/>	<input type="text"/>	0	Mon, 28 May, 2012

Update Totals

Close Order: Yes No

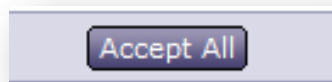
COMMENTS - ENTIRE RECEIPT

Comments:

2. Add Receiving details



The option to Accept all is displayed at top of page as per the picture inserted below



Enter the amount of items received in **Accepted field**

- Leave rejected field blank
- Click **Next**
- **Total Received** field is updated (see screenshot example)

No.	Quantity	Description	Unit	Supplier Part Number	Prev. Accepted	Prev. Rejected	Accepted	Rejected	Total Received	Date Received
1	100	Wood Twin Bed Frame w/ Pillow top Mattress	each	WTS-PM5698	0	0	<input type="text" value="50"/>	<input type="text" value="0"/>	<input type="text" value="50"/>	Mon, 28 May, 2012

Update Totals

- Click **Submit**
- Receiving is complete and following screen is displayed

UNIVERSITY OF MANITOBA EPIC Test Site

Home | Sourcing | Contracts | Procurement | Invoicing | Suppliers

Create | Search | Manage | Recent | Preferences | Community

Welcome Kristina Ward - University of Manitoba

Receiving - Done

You successfully received the selected items. Continue receiving or return to the home page.

PRB54 - Beds for Residences has been received.

- [Select another request to receive](#)
- [Return to the Arriba Buyer Home page](#)

Don't show this page again (to reset, click Preferences).

- Click link to Return to Home page

If an error has been made by the supplier or you are required to return the goods to the supplier you may reject receiving that was previously entered within EPIC.

Rejecting Receiving

1. Find Request for Rejecting Receiving

- Go to Home page and find request named “Beds for Residences” in ‘**To Do**’ box then click “**Receive**” under the Required Action title.

OR

- Find the request name in the “My Documents” section of the home page.
- Click on Request Name
- Request is displayed
- Note: Document is in **Receiving** status
- Click **Receive** (or **Edit**) Icon at top of screen



- Receiving Steps page is displayed



New Receipt document has been assigned
Previously Accepted items is updated

No.	Quantity	Description	Unit	Supplier Part Number	Prev. Accepted	Prev. Rejected	Accepted	Rejected	Total Received	Date Received
1	100	Wood Twin Bed Frame w/ Pillow Top Mattress	each	WTB-PM5698	50	0	<input type="text"/>	<input type="text"/>	50	Mon, 28 May, 2012

2. Reject Receiving

- Leave accepted field blank
- Enter the amount of items rejected in **Rejected field**
- Click **Next**

3. Additional Information

- Additional Information screen is displayed
- Enter reason in **Rejection Reason** field – eg. “**Damaged frames**”
- Click ‘**Replacement**’ button
- Click **Next**
- Summary of rejected items is displayed



Check Box to send message (email) to Purchasing Services department for rejected items is available. If you require assistance in coordinating the return it is suggested that you involve Purchasing Services.

- If known, enter return authorization number from supplier in **Goods Return Tracking number** field
- Click **Submit**
- Receiving is complete and Receiving Done screen is displayed
- Click link to Return to Home page

If an error has been made and too much receiving has been entered you may remove receiving within EPIC.

Removing Receiving


1. Find Request for Rejecting Receiving

- Go to Home page and find request named “Beds for Residences” in ‘**To Do**’ box then click “**Receive**” under the Required Action title.

OR

- Find the request name in the “My Documents” section of the home page.
- Click on Request Name
- Request is displayed
- Note: Document is in **Receiving** status
- Click **Receive** (or **Edit**) Icon at top of screen



- Receiving Steps page is displayed
- New Receipt document has been assigned
-  Previously Accepted & Rejected items are updated

Receiving Steps

Receipt RC288: PO340 - Beds for Residences

1 Select Receipt

2 Receive

3 Additional Info

4 Summary

For a receipt, indicate the amount or quantity to accept or reject for each line item, and the date received. If you reject receipt line items, you must provide comments to explain your action.

Accept All

Order ID: PO340 Date: Mon, 28 May, 2012

Order Title: Beds for Residences Processing Status: Receiving

My Labels: [Apply Label...](#)

Line Items - Quantity Receiving Needed

No.	Quantity	Description	Unit	Supplier Part Number	Prev. Accepted	Prev. Rejected	Accepted	Rejected	Total Received	Date Received
1	100	Wood Twin Bed Frame w/ Pillow top Mattress	each	WTB-PM5698	50	20	-20	0	70	Mon, 28 May, 2012

Update Totals

2. Adjust Receiving

- In **Accepted** field enter the amount of items you would like removed. (eg. -20)
- Leave **Rejected** field blank
- Click **Next**
- Adjustments are displayed

Receipt RC295: PO382 - Copy of Beds for Residences

Review the receipt, make changes as necessary, and then submit it for approval.

Summary Approval Flow

Order ID: PO382 Date: Mon, 28 May, 2012

Order Title: Copy of Beds for Residences Processing Status: Receiving

My Labels: [Apply Label...](#)

Line Items - Quantity Receiving Needed

No.	Quantity	Description	Unit	Supplier Part Number	Prev. Accepted	Prev. Rejected	Accepted	Rejected	Total Received	Date Received
1	100	Wood Twin Bed Frame w/ Pillow top Mattress	each	WTB-PM5698	50	20	-10	0	60	Mon, 28 May, 2012

Update Totals

- Click **Submit**
- Receiving is complete and Receiving Done message is displayed
- Click link to Return to Home page

Module 6: Invoice Reconciliation Process

Invoice reconciliations are generated in EPIC when the invoice received from the supplier varies from the Purchase Order or Contract that originated in EPIC.

This process provides the University an opportunity for comparison and analysis between the originating agreement and the invoice before payment is processed when a difference has occurred.

Invoice Variances

There are 53 invoice exceptions that could occur in EPIC and each exception type is handled by different users within EPIC. Who is managing the exception has been determined based on the individuals who would have the best information to resolve the exception in a timely manner.

As a requestor in EPIC there are 7 exceptions that could require your review and action. A requestor is the individual who is listed in the “On Behalf of” field on the original requisition. The remaining exceptions are managed within Financial Services.

Exception Type	Explanation	Applies To	Responsible to Resolve
PO Amount Variance	The total amount of the invoice is greater than the total amount of the purchase order.	Purchase Orders when line items are less than \$2,500 and total order is less than \$25,000	Requestor
Item Unmatched	The system is unable to find a line item on the purchase order that matches the invoice line item.	Purchase Orders when line items are less than \$2,500 and total order is less than \$25,000 and all Contract related variances	Requestor
PO Line Amount Variance	The amount on the invoice line item is greater than the amount left to invoice on the purchase order line item, and the difference is more than the tolerance set in your configuration.	Purchase Orders when line items are less than \$2,500 and total order is less than \$25,000	Requestor
PO Price Variance	The price on the invoice line item is different from the price on the purchase order line item, and the difference is more than the tolerance set in your configuration.	Purchase Orders when line items are less than \$2,500 and total order is less than \$25,000	Requestor
PO Quantity Variance	The quantity on the invoice line item is different from the quantity on the purchase-order line item, and the difference is more than the tolerance set in your configuration.	Purchase Orders when line items are less than \$2,500 and total order is less than \$25,000 and all Contract related variances	Requestor
PO Received Line Amount Variance	The invoice item's amount is greater than the order item's received amount.	Purchase Orders when line items are less than \$2,500 and total order is less than \$25,000 and all Contract related variances	Requestor
PO Received Quantity Variance	The invoice item's quantity is greater than the order item's received quantity.	Purchase Orders when line items are less than \$2,500 and total order is less than \$25,000 and all Contract related variances	Requestor

Notification of Invoice Reconciliation

When there is an invoice reconciliation document that requires your review you will be notified based on your notification preferences. The options available are:

- 1) Immediate email for each individual document
- 2) Summary email – a compilation of documents for the day
- 3) My To Do – directly in EPIC from either your dashboard or the Manage menu.

If you select either of the email notification options the email will provide you with a message that a variance has occurred which requires your action along with details of the lines from the order.

This screenshot demonstrates the individual email notification.

IRTest - Smoke Test-11 (Supplier: University of Manitoba - Bookstore Amount: \$65.14 CAD) requires your action because "Requester Must Resolve"

Requester: Irina Leitman Created: 4:25 PM Thursday, October 4, 2012 CDT

Actions: [Open](#)

Supplier Invoice #	Supplier	Invoice Date
Test - Smoke Test	University of Manitoba - Bookstore	Thursday, October 4, 2012

Line Items

#	Order	Order Line #	Description	Account Type	Qty	Unit	Price	Amount				
1	PO11	1	Targus City Gear notebook carrying case for the Dell E6430 or similar notebook	Expense	1.00	each	\$59.95 CAD	\$59.95 CAD				
			Program	Organization	Fund	Account	SubAccount	Activity	Location	Product	Type	Proportion
			1300-Administration Expenses	571400 - Revenue, Student and General Acctg	120056 - RCGA Misc	706801-Computer Hrdwire - Under \$2500					Percentage	100.00
2	PO11	1	Internal Supplier	Expense	1.00		\$0.99 CAD	\$0.99 CAD				
			Program	Organization	Fund	Account	SubAccount	Activity	Location	Product	Type	Proportion
			1300-Administration Expenses	571400 - Revenue, Student and General Acctg	120056 - RCGA Misc	706801-Computer Hrdwire - Under \$2500					Percentage	100.00
3	PO11	1	Manitoba Provincial Sales Tax	Expense	1.00		\$4.20 CAD	\$4.20 CAD				
			Program	Organization	Fund	Account	SubAccount	Activity	Location	Product	Type	Proportion
			1300-Administration Expenses	571400 - Revenue, Student and General Acctg	120056 - RCGA Misc	706801-Computer Hrdwire - Under \$2500					Percentage	100.00

Total Amount: \$65.14 CAD

The variance itself must be reviewed and resolved within EPIC. To access the document in EPIC, click the **Open** button to log into EPIC.

IRTest - Smoke Test-11 (Supplier: University of Manitoba - Bookstore Amount: \$65.14 CAD) requires your action because "Requester Must Resolve"

Requester: Irina Leitman Created: 4:25 PM Thursday, October 4, 2012 CDT

Actions: [Open](#)

In the summary email the notification includes the document number and the message that there is an exception for you to resolve however the order details are not displayed. With this option you are required to click the **Open** button to log into EPIC and resolve each exception.

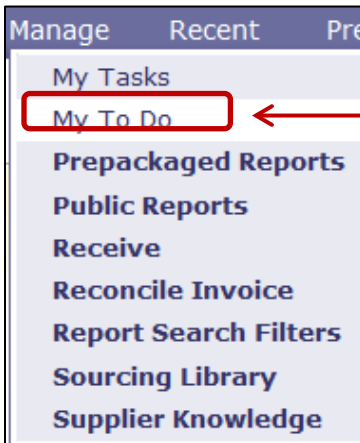
If you have chosen to turn off your email notifications completely and manage through the **My To Do** within EPIC, you can access your pending documents either from the dashboard or through the **Manage** menu.

Your **To Do** box is on the Home Tab in EPIC. →



Date ↓	Status	Title
11/2/2012	Reconciling	KW78IRtrn (\$442.95 CAD) (Staples Stationery Store # 58)
11/2/2012	Ordered	Supplier Payment Services Office Supplies (Tom Mirwaldt)
10/11/2012	Submitted	Physcial Plant Fun Toys (Tom Mirwaldt)

[View List ...](#) (3)



Click on the **Manage** menu and select **My To Do**.

The **To Do** screen will be displayed.



To Do

You are included in the approval flow for these requests, and you are required to reconcile, approve or deny them. To review a summary of a request before taking action, click the request's ID or title.

Approvable Type: No Choice [Clean Up](#)

Search Filters [Search Options](#)

Found 1 item

Type	ID	Date Submitted ↓	Requester	Status	Title	Total	Actions
	IRKW78IRtrn-1896	2 Nov 2012	Tom Mirwaldt	Reconciling	IRKW78IRtrn-1896	\$442.95 CAD	Approve Deny Archive To Label

Reviewing & Resolving Variances

Invoice reconciliation documents will display with an **IR document ID** and will be in **Reconciling status**.

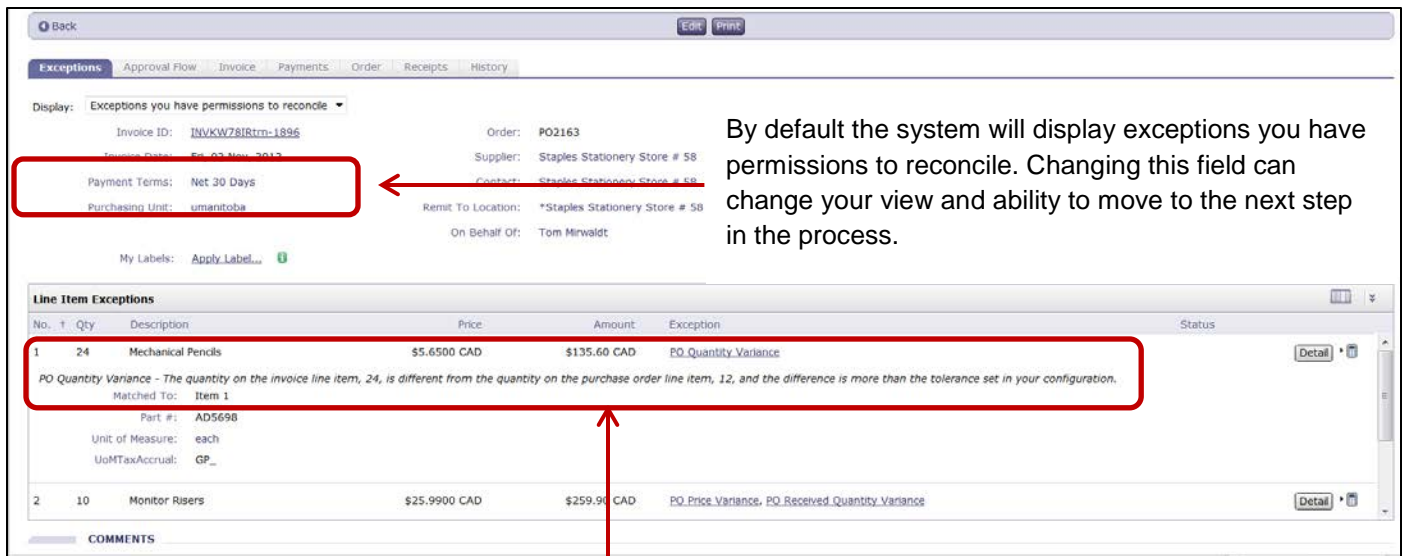
To review a document, click on the **IR document ID** or click the **Actions** option and select **Reconcile**. Either of these actions will allow you to review the invoice reconciliation and begin determining how to resolve.



The screenshot shows a 'To Do' list with one item. The 'IR document ID' 'IRKW78IRtrn-1896' is highlighted with a red box. The 'Actions' menu is also highlighted with a red box, showing the 'Reconcile' option.

Type	ID	Date Submitted	Requester	Status	Title	Total	Actions
	IRKW78IRtrn-1896	2 Nov 2012	Tom Mirwaldt	Reconciling	IRKW78IRtrn-1896	\$442.95 CAD	Reconcile

Once the document is selected the exceptions that have occurred will be displayed



By default the system will display exceptions you have permissions to reconcile. Changing this field can change your view and ability to move to the next step in the process.

Payment Terms: Net 30 Days

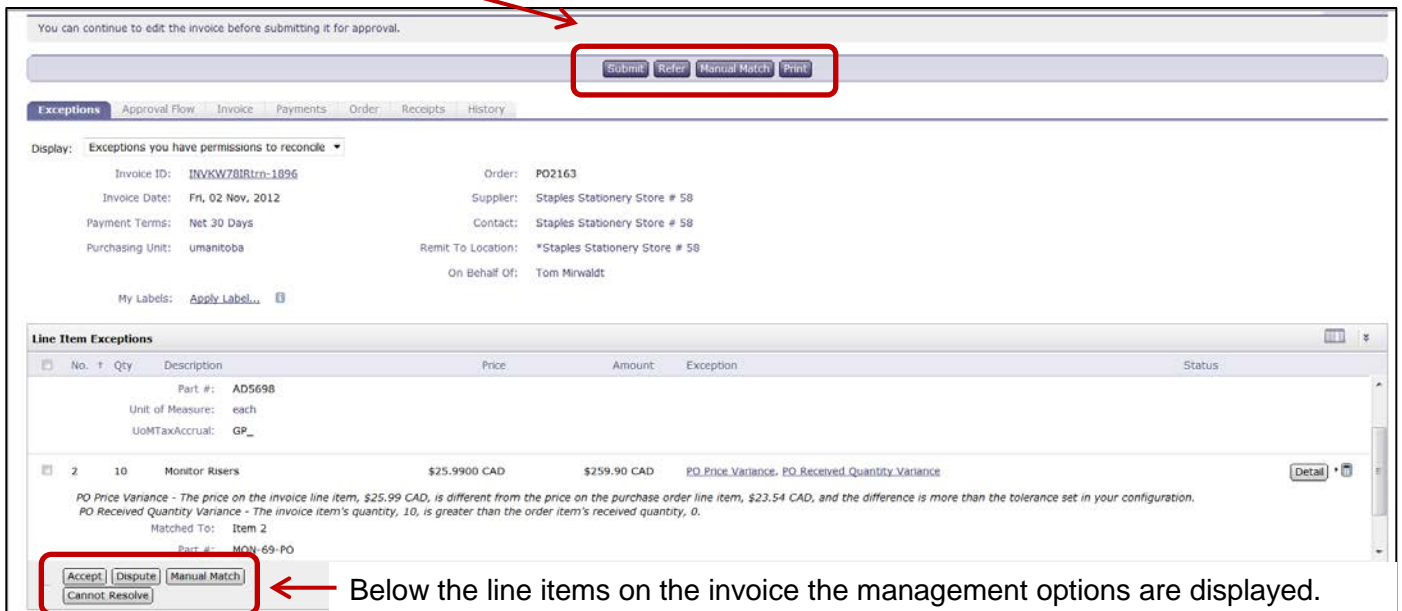
No.	Qty	Description	Price	Amount	Exception	Status
1	24	Mechanical Pencils	\$5.6500 CAD	\$135.60 CAD	PO Quantity Variance	
PO Quantity Variance - The quantity on the invoice line item, 24, is different from the quantity on the purchase order line item, 12, and the difference is more than the tolerance set in your configuration.						
Matched To: Item 1						
Part #: AD5698						
Unit of Measure: each						
UoMTaxAccrual: GP_						
2	10	Monitor Risers	\$25.9900 CAD	\$259.90 CAD	PO Price Variance, PO Received Quantity Variance	

Description of the Invoice exception that has occurred is displayed at the line.



To manage the variance click the **EDIT** button at the top of the screen

The Invoice Reconciliation document is opened for your review and action. At the top of the screen you have 4 action options displayed.



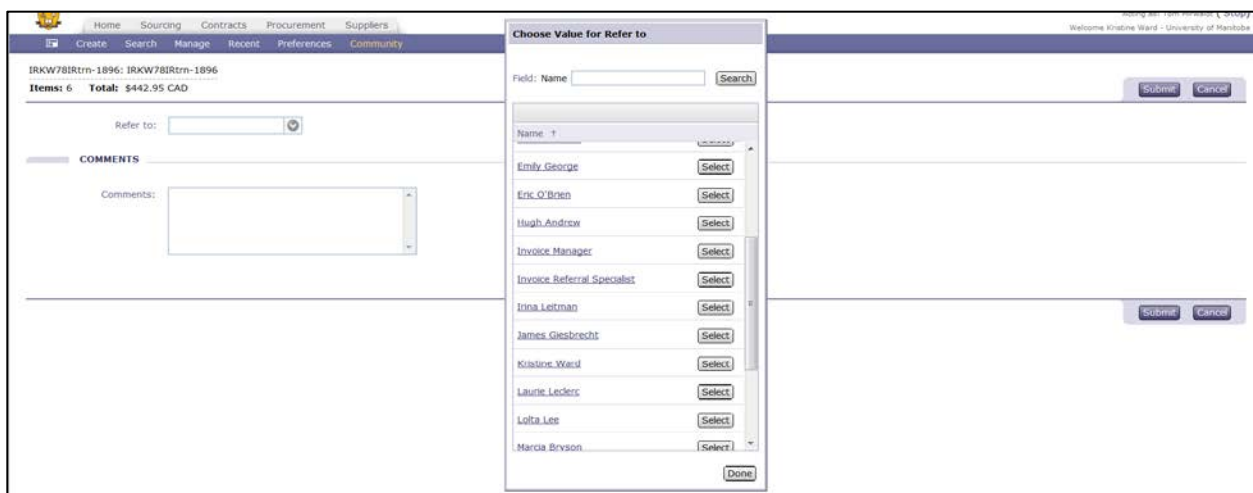
Below the line items on the invoice the management options are displayed.

These options allow you to clear the variance and for Financial Services to proceed with issuing payment to the supplier **OR** requesting that another individual from the University become involved to assist in the process when payment should not be issued.

The actions resulting from the options at the top of the screen are:



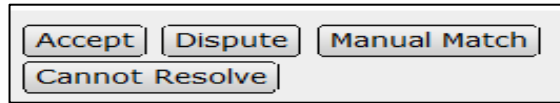
- **Submit** – Use this action to Submit the changes you have made to the reconciliation document. When you submit the IR, the approval process is regenerated to add any additional approvers to the approval flow if needed and the next approver in the approval chain is notified.
- **Refer** – Use the refer action to forward the invoice reconciliation document to another user and ask for assistance. By referring the invoice reconciliation to somebody else, you modify the approval flow to insert the **Refer To** contact into the existing approval flow.



- **Manual Match** - Use this action only if you want to match the IR to a different purchase order or contract than the one matched to automatically or if the system could not find a matching order or contract that does exist.
- **Print** - Obtain a paper or PDF version of the variance.

The actions resulting from the options at the line of the invoice are:

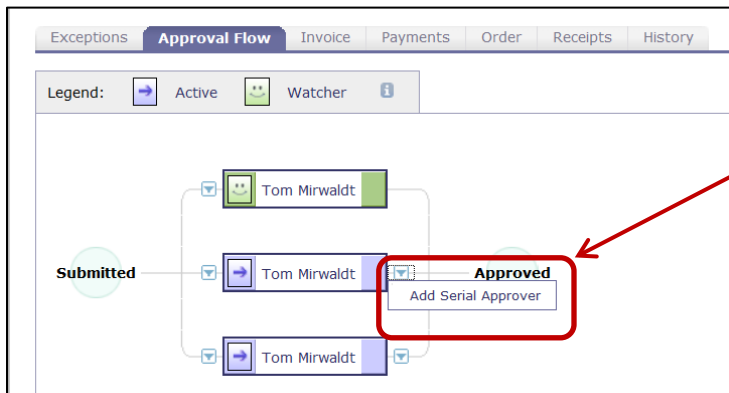
***Please note that these actions must be performed for each line item that has an exception*



- **Accept** – If you accept a line-item exception, you are accepting the invoice amount as submitted by the supplier.
- **Dispute** – If you dispute a line-item exception, you are indicating that the exception is incorrect. The values on the original purchase order (not the invoiced amount) are marked for payment.
- **Manual Match** – When you need to identify the corresponding line item on the Purchase Order or Contract ID in EPIC when the invoice has been allocated incorrectly.
- **Cannot Resolve** – If you flag an exception as Cannot Resolve, you indicate that you are moving ahead with the approval process without addressing the exception and requesting someone else to resolve – this may include the original requisitioner or signing authority to approve additional expenditures or Purchasing Services to confirm negotiated terms.

Review the variance description and determine the best course of action.

If you do not have Signing Authority on the FOP applied to the invoice, you must obtain approval from a signing authority before you Accept additional expenditures.



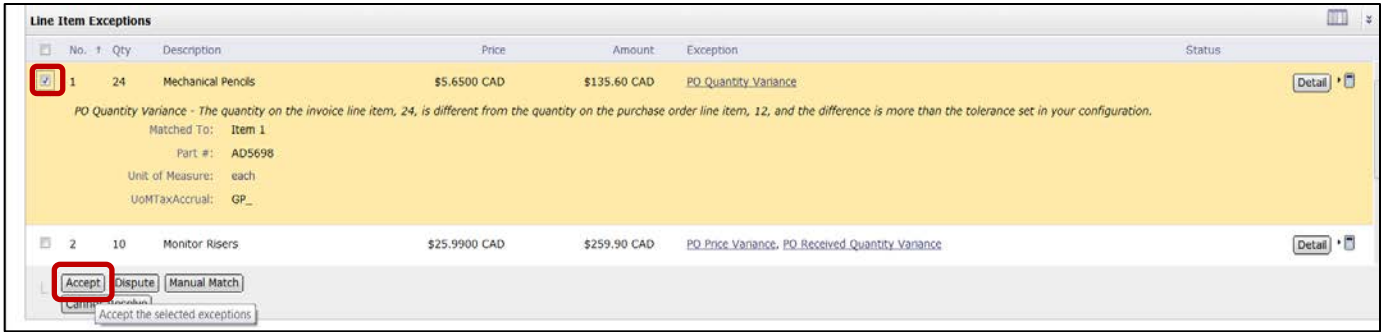
To add an approver, click on the Approval Flow tab. Select the arrow after the active approval and select Add Serial Approver.

Click the drop down arrow and search for the individual who has authority to approve the expenditure.

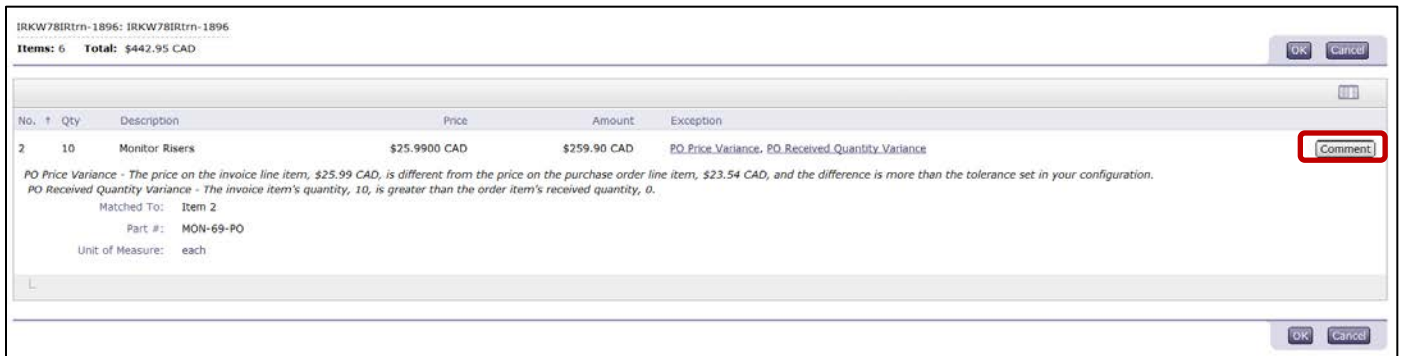
Ensure the radio button is set to **Approver**.

Provide a reason for the approval so that the Approver is informed of the reason they are approving the variance.

To **Accept** the variance click the checkbox beside the line item and select **Accept**



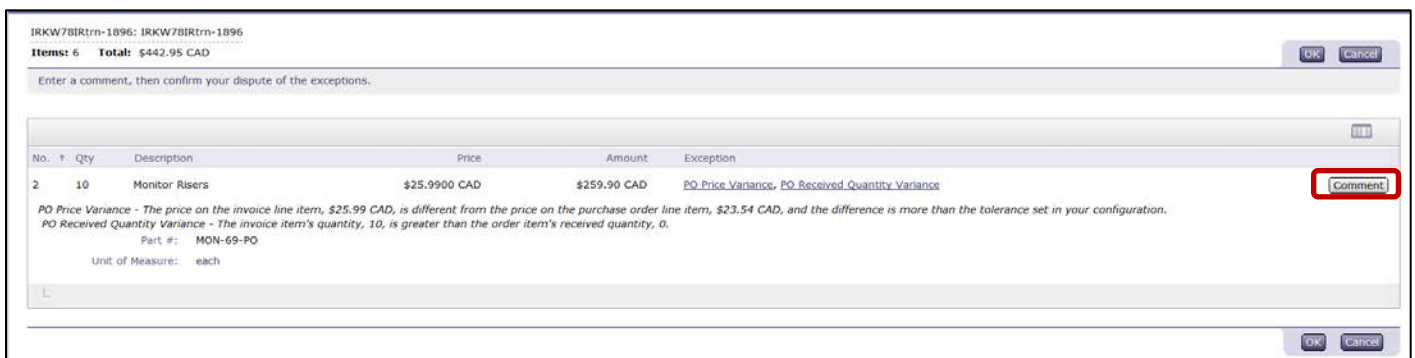
The following screen will be displayed. You can add comments to explain why the variance is being accepted for future reference by clicking the **Comment** button.



Click **OK**. The exception has been Accepted and cleared.

To **Dispute** the variance click the checkbox beside the line item and select **Dispute**

The following screen will be displayed. When disputing a charge it is recommended that you add comments to explain why the variance is being disputed so that this information can be communicated to the supplier by Financial Services. Click the **Comment** button to add the details for the dispute.



Click **OK**. The exception has been Disputed and cleared.

When a variance has occurred due to the supplier invoicing for a line item incorrectly that exists on the order you can select **Manual Match**.

To **Manual Match** the item to another line on the PO click the checkbox beside the line item and select **Manual Match**

The following screen will be displayed. Select the drop down to choose a line item from the order to apply the charge.

No.	Qty	Price	Amount	Exception
2	10	\$25.9900 CAD	\$259.90 CAD	PO Price Variance, PO Received Quantity Variance

Manually Match To: PO Item 2 [select]

Comment

You can also view all available lines by clicking the **Select** option. The following will be displayed to allow you to select the appropriate line.

No.	Qty	Description	Price	Amount	Exception
1	24	Mechanical Pencils	\$5.6500 CAD	\$135.60 CAD	PO Quantity Variance

MANUALLY MATCH TO - ORDER LINE ITEM

No.	Qty	Part #	Description	Unit	Price	Amount
1	12	AD5698	Mechanical Pencils	each	\$5.6500 CAD	\$67.80 CAD
2	10	MON-69-PO	Monitor Risers	each	\$23.5400 CAD	\$235.40 CAD

Select

You can add comments for future reference by clicking the **Comment** button.

In the event that you **Cannot Resolve** the variance without additional input from someone else you can select **Refer** at the top of the screen or **Cannot Resolve** at the line item. Both actions will remove the variance management from your **To Do** and the new approver will be responsible to resolve the invoice.

To forward to another user select **Refer or Cannot Resolve**. The following screen will be displayed. Select the drop down to choose search and find the individual whom you are forwarding the exception to.

Please note: Only individuals who were involved in the approval flow can be selected along with individuals from Financial Services.

IRKW78IRtrn-1896: IRKW78IRtrn-1896
Items: 6 Total: \$442.95 CAD

When you are unable to resolve exceptions, select the user to whom those exceptions should be referred.

No.	Qty	Price	Amount	Exception
2	10	\$25.9900 CAD	\$259.90 CAD	PO Price Variance, PO Received Quantity Variance

PO Price Variance - The price on the invoice line item, \$25.99 CAD, is different from the price on the purchase order line item, \$23.54 CAD, and the difference is more than the tolerance set in your configuration.
PO Received Quantity Variance - The invoice item's quantity, 10, is greater than the order item's received quantity, 0.

Description: Monitor Risers
Part #: MON-69-PO
Unit of Measure: each

Refer to [dropdown menu]

Comment

When forwarding an exception it is recommended that you add comments to explain to the individual who will be managing the variance why you are referring the exception to them and any details that could assist them in resolving. Click the **Comment** button to add the details for the referral.

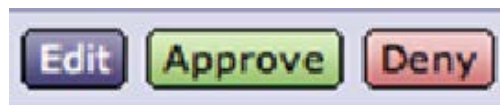
Module 7: Review and Approve Requests

Approve/Deny a Request in EPIC

1. Go to the **Home** page by clicking on the home tab.
2. Locate the **“To Do”** box section of your home page where you will find the items which require approval

OR

Locate the **common actions** box at the top left of the home page and select **“My To Do”**



3. Click the **Title** of the request to open up the request which requires approval.
4. Once the request is open, review the details by selecting “details” on each line item. Once fully reviewed, revert back to the summary tab to view the 3 options for approving.
5. The **Edit** option will simply allow you to look at more options within the request but not physically edit the request.
6. When **approving** or **denying** the request you will be directed to a page which allows you to add comments if you wish. A check box option to make the comments visible to the supplier is also available.
7. Click the **“Home”** tab to return to the EPIC home page.

Approve/Deny a Request in EPIC via Email

Similarly to approving through EPIC, you can approve or deny a request directly via email. If you have chosen to receive emails for each purchase request, here is how to approve requests.



1. Locate the email where the subject of the email begins with **ACTION REQUIRED**.
2. Once the details are reviewed, such as the FOAP, find the 3 options for approving.
3. Clicking **Open** will simply open a link to JUMP where you can login to EPIC from there.
4. Clicking on **Approve** or **Deny** will compose a new email with all the pertinent information to approve or deny the request.

You can add a comment with your response by typing it within the comments section. Please **DO NOT** delete or change the pre-existing text within the email.

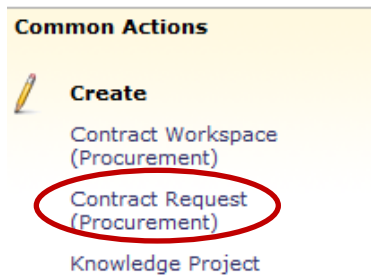
Module 8: Contract and Sourcing Requests

Creating a Contract Request (Under Revision)

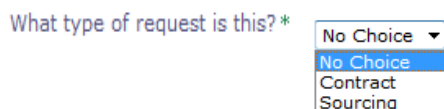
The “Creating a Contract Request” manual is available on the EPIC webpage located under the “Training & Support” page.

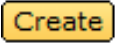
Creating a Sourcing Request

1. Begin Request from Homepage
 - Locate ‘Create’ section of the ‘Common Actions’ list on the left side of the screen
 - Select Contract Request



- Contract Request form is displayed
2. Add name for the Request
 - Enter the name In the Name field such as “**Spectrophotometer**”
 - Names should give an idea of what product/service is being requested
3. Add detailed description of request
 - In the Description field - provide the details such as “**Portable Spectrophotometer for measuring samples in the lab or field. Complete specifications attached**”
4. Note: The field labeled ‘**Copy from Contract**’ allows you to copy previous contracts
 - Leave as “**no value**” unless:
 - This should only be used if an identical Request already exists in the system
 - This will result in all the details below being populated with the details of that Request
5. ‘Test Project’ field
 - Select the **NO** radio button
 - This field must be set to “**No**” to have this Request be submitted to Purchasing Services
6. What type of request is this?’ field
 - Select “**Sourcing**”



- This will result in the remaining fields changing to information that is pertinent to the UofM Sourcing process
7. Leave 'Base Language' field as default "**English**"
 8. Select Commodity
 - Click the drop down arrow beside the **Commodity** field
 - Select **Search for More**
 - Search screen is displayed
 - In Search field type **Spectrophotometer**
 - Click **Search**
 - Search results are displayed
 - Click the checkbox on the appropriate line labeled **Spectrophotometer**
 - Click **Done**
 9. Select Region
 - Click the drop down arrow beside the Regions field
 - Select **Search for More**
 - Search screen is displayed
 - In search field type **Manitoba**
 - Click the checkbox on the line labeled Manitoba
 - Click **Done**
 10. Leave 'Predecessor Project' – leave as (no value)
 - This should only be used if this Request is expressly tied to an existing project
 11. Define Accounting Elements - FUND
 - In **FUND** field type the appropriate fund or if necessary click the drop down arrows beside the FUND field
 - Select **Search for More**
 - Search screen is displayed
 - In search field type the appropriate organization
 - Click Arrow beside results labeled
 - Enter the appropriate **Organization** fund number
 - Enter the **Account** fund number
 - Enter the **Program** fund number
 12. Scroll to bottom of screen
 - Review questions
 - Answer **questions 1, 2 & 3**
 - Click **Create** button 
 13. Sourcing Request has been created

- Note contract ID number has been assigned and is visible in upper right hand corner of screen – this is your number to track your request. Although this is a sourcing request the numbering convention is the same as the contract request.

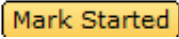

14. Click the **Documents tab** at top of screen

- Documents tab is displayed
- Click the “**Actions**” button on the right side and review options
 - This would be where the specifications could be attached
- Select **Document** from the menu under Upload
- Create New Document form is displayed
- Click Browse button
- Add **Photo** which may help identify or benefit the sourcing request
- Click **Create**
- Document page is displayed
- Click **Done**

15. Click the **Tasks tab** at top of screen

- Task screen is displayed - These are the steps that must be completed before submitting the Request to Purchasing Services

16. **Task 1** – “Attach Relevant Documents”

- Click on the task name
- Menu appears - Select “**View Task Details**” from the menu
- Click the **Mark Started** button 
- You are returned to the Task list
- Note that the task status has changed to **In Progress**
- Click on the task name
- Menu appears - Select “**View Task Details**” from the menu
- Click the **Mark Complete** button upon completion 
- You are returned to the Task List
- Note that the task status has changed to **Complete**

17. **Task 2** – “Review Entire Sourcing Request”

- Click on the task name
- Menu appears - Select “**Mark Started**” from the menu
- Note that the task status has changed to **In Progress**
- Click on the task name
- Menu appears - Select “**Mark Complete**” from the menu upon completion
- Note that the task status has changed to **Complete**

18. **Task 3** – “Approval of Sourcing Request – Purchasing Services

- Click on the task name

- Select **View Task Details** from the menu
- Approval task is displayed, select a fixed due date such as **tomorrow**, using the calendar icon to the right
 - You can type a message for the Purchasing Services Approver if you'd like
- Scroll to bottom of screen – note approval flow is pending to go to Sourcing Manager (EPIC defined group of Purchasing Services)
- Click **Submit**

Spectrophotometer
Contract Request (Procurement)

ID: CW2179423
Tasks: [Incomplete Tasks: 1](#)

Overview Documents **Tasks** Team Message Board History

Show: (Any Status) Required/Optional

Spectrophotometer Actions Outline

Name	Document	Owner	Status	Due Date
<input checked="" type="checkbox"/> Attach Relevant Documents		Kristine Ward	Complete	
<input checked="" type="checkbox"/> Review Entire Sourcing Event Request*		Kristine Ward	Complete	
Approval of Sourcing Event Request - Purchasing Services*	Spectrophotometer	Kristine Ward	In Approval	06/05/2012

- Note that the task status has changed to **In Approval**

19. At this point, you cannot proceed until the Purchasing Services approval is completed

- Once approval is complete, opening the “Documents” tab would display a new document called “Sourcing Project”
- This will allow one-click access from the Request to the Sourcing Project, once it is initiated by Purchasing Services, for your review.

Sourcing request is successfully submitted to Purchasing Services.

Key Terms and Definitions

Approver

Individual or group responsible to review requests in EPIC and choose to approve or deny a request.

Ariba

Ariba, Inc. is the software used for the EPIC tool and is the global leader in E-Procurement solutions providing streamlined procurement procedures and business practice expertise.

Buyer

This is the name of the person responsible for the requisition in purchasing services. This field will be populated by Purchasing Services when they are involved in the request – **leave blank**

Cater TRAX

CaterTRAX is the University of Manitoba catering service.

Composing

Requisition which is in progress. The requisition is yet to be submitted.

Dashboard

A personalized portal which displays tools to help navigate within the EPIC system.

EPIC

Electronic Procurement and Information Center. A web based application used to purchase goods or services from suppliers.

FOAP

The University's Chart of Accounts consists of four elements commonly referred to as a FOAP: **F**und, **O**rganization, **A**ccount, and **P**rogram.

FOB Shipping Information

This shipping field in a purchase requisition means "Freight On Board". This field will be populated by Purchasing Services when they are involved in the request – **leave blank**.

Invoicing

The Invoicing tab is used for searching invoices purchase order #'s. This tab is primarily used by Supplier Payment Services.

Local Catalog

Local Catalog's are external catalogs from a supplier which have been imported into EPIC and display various products and information.

Non-Catalog Order

Non-Catalog orders are used to order goods/services from suppliers when a catalog is not available in the EPIC system via Local or Punch-out catalogs

OK to Pay

This means the requisition has no invoice variances and has been approved. The requisition is therefore being sent to Banner and is being processed for payment.

PO Flip

A PO flip occurs when there is a supplier who has not been added to supplier list in EPIC, and is provided directions to sign into EPIC and complete required information from a manual purchase requisition.

Punch-out Catalog

Punch-out Catalog's are catalogs which are linked to EPIC, so when you order on the site through EPIC, EPIC still recognizes your selections on the external site.

PR Number

A unique number which helps identify the Purchase Requisition.

Preparer

An individual who creates and submits the requisition in EPIC. The preparer can withdraw a requisition from the approval flow, edit the requisition content and delete the requisition before it is fully approved and becomes a Purchase Order.

Purchase Order (PO)

Once a Purchase Requisition (PR) is fully approved the requisition is converted into a PO.

Receiving

The receiving process starts when a supplier ships ordered items and the items arrive at their shipping destination. When the shipment arrives, the person who receives the items submits receipt to acknowledge that goods have arrived.

Requester

An individual who manages the Purchase Order that has resulted from the purchase requisition. This individual is responsible to enter receiving on orders (when required) and review & take action on invoices that include variances based on price, item quantities, additional costs and receipts to the original Purchase Order.

Requisition

An approvable document that is created when you submit a request to purchase items. Each Requisition has a PR Number.

Signing Authority

An employee who has been given the authority to sign off on expenditures for the FOP combination.

Sourcing

The Sourcing tab is used for searching sourcing projects and viewing the status of events. This tab is primarily used by Purchasing Services.

Watcher

A watcher is a user or group who is notified of the submission and status of an approvable, but who cannot approve or deny the approvable. For example, facilities personnel might need to know when any office furniture is purchased.

Aurora Finance: EPIC eProcurement Guide

The information contained in this document is subject to change without notice.

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