

EXPLORING THE EPIC INTERFACE

EPIC (Electronic Procurement Information Centre) is a web based application used to purchase goods or services from suppliers. EPIC provides quick & simple access to negotiated pricing using on-line catalogs to help you create electronic requisitions that eliminates paper and reduces the need to copy and file requisitions while fast tracking the procurement process.

GETTING STARTED WITH EPIC

To access the EPIC tool, you must have claimed your UMNetID. If you already have this, please go to step #2

1. Claim UMNetID at: www.umanitoba.ca/umidm. Choose **Create UMNetID**.
2. JUMP is located at the top right hand corner of the U of M webpage or by going directly to www.umanitoba.ca/jump. Scroll to the **Quick Links** section and click on EPIC. This will open a new window and **auto log you into EPIC**.

NAVIGATION TABS

Home	Contains commands from all tabs. At a glance you can see Common Actions, Recently Viewed Documents, News, Search Bar, To Do list, along with the My Documents section.
Sourcing	Search Sourcing Projects and view the status of events you are involved in. Review sourcing events pending your review/approval.
Contracts	Create a new contract, view existing contracts you are involved in. Review contracts pending your review/approval.
Requisitions	Create a new requisition, search the catalog, create a catalog or non-catalog entry, search, and manage other requisitions.
Invoicing	Search invoices connected to your orders. Review invoices pending your review/approval.
Suppliers	Search for Suppliers that are available in the system.

SETTING UP YOUR DASHBOARD

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 such as **"Revert to Default Settings"** to revert back to the original view. You can use the **drag and drop** feature to plot content information into various dashboard locations to suit your needs. The **"To Do"** and **"My Documents"** content boxes are better utilized as full panel views to view all required action options (see screenshot below).



SETUP ACCOUNTING/SHIPPING INFORMATION

1. Click on the **Preferences** tab then select **Change your profile** from the drop down menu.
2. Edit default POAP or the default "Ship To" shipping address for your account.

EMAIL NOTIFICATION PREFERENCES

1. Click on the **Preferences** tab, then select **Change email notification preferences** from the drop down menu.



2. Click the **arrow** beside **Edit Preferences for**, then select the desired document type. For this example, select **Requisition** from the drop down menu.

Edit Email Notification Preferences
The document type selected should be highlighted



Note: If you generally approve only one document type, you may want to make notifications more frequent for that document type.

3. Click the **arrow** beside the field **When I am an approver** to display the drop down options.
4. Select your choice (Send email immediately or Send email summary).
5. To turn off all email notifications, click the **arrow** beside the field **When I need to approve a document** to display drop down options and select

DELEGATING AUTHORITY

You can delegate user rights to another individual while you are away for a defined period. This allows the delegated individual to perform EPIC duties on your behalf. If you do not have default profile information entered, you won't be able to delegate— but the Aurora Finance Help Desk is happy to do this for you.

1. Click on the **Preferences** tab then select the **Delegate Authority** option.
2. Click **arrow** beside **Delegatee field**, click on

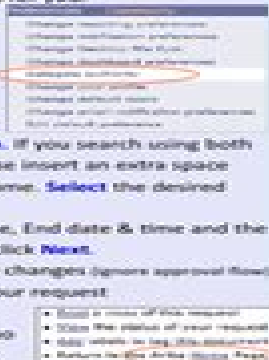
Search for more... Type the name you need. Click **Search**. If you search using both the first and last name, please insert an extra space between the first and last name. **Select** the desired name.

3. Enter the Start date & time, End date & time and the reason for delegating, then click **Next**.

4. Click **Next** again to review changes (ignore approval flow).
5. Click **Submit** to confirm your request.

6. Click **Home**.

7. The next time the user who has been granted access to delegate logs in, the option to login as "yourself" or the delegatee is shown.



INDEX

Index	
Exploring the EPIC Interface	1
Getting Started with EPIC	1
Setting up your Dashboard	1
Navigation Tabs	1
Setup Accounting/Shipping Information	1
Email Notification Preferences	1
Delegating Authority	1
Creating a Requisition	2
Creating a Non-Catalog Requisition	2
Creating a Non-PO Invoice	3
Managing Requisitions	3
Approve/Deny a Request	3
Approve/Deny a Request via Email	3
Canceling an Order	3
Entering Receiving	3
Viewing Invoices	4
Reconciling an Invoice Variance	4
EPIC Tips & Tricks	4
Creating a Contract Request	4
Creating a Sourcing Request	4
Resources	4

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Huangqi Zhang



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Table of Contents Epic Quick Reference Guide

1. Understanding the eBook Epic Quick Reference Guide
 - The Rise of Digital Reading Epic Quick Reference Guide
 - Advantages of eBooks Over Traditional Books
2. Identifying Epic Quick Reference Guide
 - Exploring Different Genres
 - Considering Fiction vs. Non-Fiction
 - Determining Your Reading Goals
3. Choosing the Right eBook Platform
 - Popular eBook Platforms
 - Features to Look for in an Epic Quick Reference Guide
 - User-Friendly Interface
4. Exploring eBook Recommendations from Epic Quick Reference Guide
 - Personalized Recommendations
 - Epic Quick Reference Guide User Reviews and Ratings
 - Epic Quick Reference Guide and Bestseller Lists
5. Accessing Epic Quick Reference Guide Free and Paid eBooks

- Epic Quick Reference Guide Public Domain eBooks
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- Epic Quick Reference Guide Budget-Friendly Options
- 6. Navigating Epic Quick Reference Guide eBook Formats
 - ePub, PDF, MOBI, and More
 - Epic Quick Reference Guide Compatibility with Devices
 - Epic Quick Reference Guide Enhanced eBook Features
- 7. Enhancing Your Reading Experience
 - Adjustable Fonts and Text Sizes of Epic Quick Reference Guide
 - Highlighting and Note-Taking Epic Quick Reference Guide
 - Interactive Elements Epic Quick Reference Guide
- 8. Staying Engaged with Epic Quick Reference Guide
 - Joining Online Reading Communities
 - Participating in Virtual Book Clubs
 - Following Authors and Publishers Epic Quick Reference Guide
- 9. Balancing eBooks and Physical Books Epic Quick Reference Guide
 - Benefits of a Digital Library
 - Creating a Diverse Reading Collection Epic Quick Reference Guide
- 10. Overcoming Reading Challenges
 - Dealing with Digital Eye Strain
 - Minimizing Distractions
 - Managing Screen Time
- 11. Cultivating a Reading Routine Epic Quick Reference Guide
 - Setting Reading Goals Epic Quick Reference Guide
 - Carving Out Dedicated Reading Time
- 12. Sourcing Reliable Information of Epic Quick Reference Guide
 - Fact-Checking eBook Content of Epic Quick Reference Guide
 - Distinguishing Credible Sources
- 13. Promoting Lifelong Learning
 - Utilizing eBooks for Skill Development

- Exploring Educational eBooks

14. Embracing eBook Trends

- Integration of Multimedia Elements
- Interactive and Gamified eBooks

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