

#### GETTING STARTED: MONTH 1

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

1. Claim UMNetID at: [www.umanitoba.ca/umid.htm](http://www.umanitoba.ca/umid.htm). 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](http://www.umanitoba.ca/jump). Scroll to the **Quick Links** section and click on EPSC. This will open a new window and **auto log you into EPSC**.

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.
Requisitioning	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 WORK DISPOSITION

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 values.

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 available 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.

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 **Resolution** from the drop-down menu.



**Note:** If you generally approve only one document type, you may want to make notifications more relevant 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

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 **Date-time** subtab on the right.

2. Click arrow beside **Delegate 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

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**.
  - Once a user off this request.
  - Click the status of your request.
  - Click status on [log this request](#).
  - Return to the [Access Request](#) page.
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.



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# Epic Users Guide Cheat Sheets

**Lei Shi**

A red circular graphic with a gradient, appearing as a stylized arrow or a decorative element, positioned to the right of the 'Lei Shi' text.

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