

EPIC: Electronic Procurement and Information Centre

Quick Reference Guide



UNIVERSITY OF MANITORA

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 UMnettD at: www.umanitoba.ca/iridium.

Choose Create UMmetID

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.

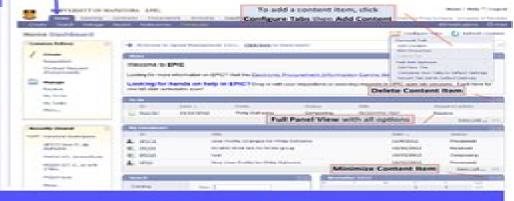
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The second second second second	
Horizon	Contains commands from all tabs. At a glance you can
	see Common Actions, Recently Viewed Documents, News,
	Search Bar, To Do list, along with the My Documents
	section.
Seaming	Search Sourcing Projects and view the status of events you
	are involved in. Review sourcing events pending your
	neview/opproval.
Contracts	Oreste a new contract, view existing contracts
	you are involved in. Review contracts pending your
	neview/approval.
Procurement	Create a new requisition, search the catalog,
	create a catalog or non-catalog entry, search, and
	manage other requisitions.
Fevereng :	Search invoices connected to your orders. Review invoices
	pending your review/approval.

SETTING UP YOUR DASHBOARD

You can easily customize your dashboards to display only the content items you are interested. in, minimips or maximips 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 reductions:

You can use the drug 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

Search for Suppliers that are available in the system.

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

EMAIL NOTIFICATION PREFERENCES

1. Click on the Professores. tals, then select Change semail postdication. preferences from the dropdown menu.

Change Section 5 to Sec. Indicates to Contract Charles Street, Street

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

State Street Westernamen Productions

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

- 3. Click the amount beside the field When I am anapprover: 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 acresw beside: Delegates field, click on

PERSONAL PROPERTY AND ADDRESS. STREET, SQUARE, SQUARE, STATISTICS OF THE PARTY OF THE

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

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

4. Click Next again to review changes ignors surrout flow!

5. Click Submit to confirm your request.

Mr. of Shark Schoolings

delegatee is shown.

7. The next time the user who has been granted access to

- Book of realist of their resident . Then the place of your request. A their selects to long this measurement

Charge Section 2 in Francisco

Photograph State Street, Married Street, Stree

a Battern In the Arthur Stone Page. delegate logs in, the option to login as "yourself" or the

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Epic Computer Program Manual

J Ma



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