EPIC – How to Search for Documents

As long as you have EPIC access, you have the ability to view all documents in the system regardless if you are the person that created the request. You can search for documents using the ID number or by using the various filters available to narrow down the document that you are looking for in the system.

Let’s take a look at how this can be done!

Search Bar
On the Home Dashboard of EPIC, a search bar is located near the top of the page. In the search bar it may default to Requisition or Catalog.

Searching for Purchase Orders

1. Click in the document type field of the search bar and select Purchase Order.
   a. If you cannot find the document type in the drop down, select More... to view a full list.

2. Once you have selected Purchase Order, the fields will change accordingly.
   a. Enter the PO number (eg. PO325646) in the Order ID field.
   b. Click the magnifying glass icon to search for the document you entered.

3. You will be brought to the Search Filters page.
a. The Purchase Order will display in the search results if it was created in the most recent two weeks.

b. If no results appear, the Purchase Order may have been created longer ago than two weeks.
   i. To remove the time frame restriction, click in the field beside Date Created and change the selection from Custom to No Choice.
   ii. Click Search to update the results.
You can use the same steps above for searching other documents types such as Requisitions.

**Searching Without a Document ID Number**

If you do not know the document ID number, there are a variety of filters that can be used to narrow down your results to that document.

1. Click in the document type field and select your choice of document.

2. The fields in the search bar will change according to the document type you have chosen.
   a. Leave all fields blank and click the **magnifying glass icon** to search.

3. You will be brought to the Search Filters page. Use the filters to narrow down your search for the document you are looking for in the system.

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Need Help? Contact Aurora Finance Customer Service at **204.480.1001** or email us at epic@umanitoba.ca
a. Commonly used filters are Requester, Supplier, and Date Created.

b. Click Search to be provided results based on the filters you have used.