

Contract Request Attaching Document Instructions

You will replace this document with a signed “Contract” in EPIC to complete Task #1. This may be:

- 1) an Independent Contractor Agreement (ICA) including Schedules A, B, C as applicable to the contract
- 2) an amendment to an ICA, *i.e. Schedule D, plus affected Schedules.*
- 3) a Supplier Contract (standard or modified with negotiated terms and conditions)
- 4) a Secondment Agreement
- 5) a Construction related contract
- 6) a Word document noting that there are no specific terms or conditions of the Contract Request.

Before a contract is initiated, purchasing procedures must have been applied in arriving at a desired contract, *i.e.* Purchasing Services has approved of the transaction. Please see the Purchasing Procedures at http://www.umanitoba.ca/admin/governance/governing_documents/financial/964.html

or contact Purchasing Services at 204-474-8348 or Purchasing@umanitoba.ca for additional information.

Getting Ready!

- 1) Scan and save the signed contract document to your desktop/computer
Note: Scan the entire Contract, including any Schedules or Appendices as one document.
- 2) Scan and save any other *required documents or additional desired documents by scanning them to your desktop. These documents will be uploaded in Task 2.

This instructional document, called the “Contract Request Attaching Documents Instructions”, is automatically added to every Contract Request within the first Task and **must be replaced** with the appropriate document as outlined above before you can submit your request to Purchasing Services.

- Tasks 1 & 3 are directly related to providing documents and are the focus of these instructions
 - ✓ **Task 1** is for uploading the signed contract documents.
 - ✓ **Task 3** is to upload any other related documents, such as tender (quotes, RFP) documents & communications (emails, letters) etc.

Task 1 – Attach Your Contract Document

- The document that **must be replaced** is on **Task 1**. To replace the document, move to the document column and click the *document name*.
- A drop down menu is displayed. Select the option **Replace Document**
- When replacing a document, the following screen is displayed.

Replace Document

Choose a document to replace the **Original Document** and enter a **Description** to explain why the document is being replaced. You can replace the Original Document by uploading a new one from an external source, or by [More](#)

Original Document: new contract request March 2017.htm

Description:

New Document: Upload

#10 replace document by the uploaded file.PNG

Replace original document with a document from a project

- You can add a description of the document details. This is not a mandatory field.
 - Leave the radio button to the default selection of **Upload**
 - Select **Browse** and locate the desired file on your computer
- Click the **Replace** button

- Change the radio button to **Replace document by uploaded file** and select **OK**

Replace Document

The file you are uploading does not match the file you are trying to replace. You can either overwrite the old file with this new one or choose a different file by selecting the [More](#)

The file Safety for Supervisors Certificate_Safety for Supervisors_Schlamb.pdf, which you are uploading, does not match Contract Request (Procurement) Document Instructions_April 2013.pdf, which you are trying to replace. Do you want to:

Use the original document name and continue uploading of file
 Replace document by the uploaded file
 Select another file for upload.

- Once you have selected & replaced the document a screen appears that provides you with the option to add a title for the document and a description. It is not mandatory to Edit these fields
- Select **Save**.
- Your new document has now replaced the instruction document in EPIC.
- This is reflected on the **Tasks Tab** as well is on the **Documents Tab**
- Once the document has been replaced, you can click on the task name and select the **Mark Complete** action

Task 3 – Attach Relevant Documents (using the Documents Tab)

- The third Task is **Attach Relevant Documents**
 - ✓ Additional documents may be required however these are often scanned and attached with the contract document.
- If you do not have any other documents to attach, mark the task complete and move to the next task
- To attach additional documents, select the **Documents Tab**
 - ✓ For ICA's, please attach the completed CAR Form with the contract document on Task 1.
 - ✓ For Supplier Agreements, please attach the completed CRF Form with the contract document on Task 1.
 - ✓ You may also attach any other documents such as quotes, emails, etc. here.
- In the **Documents Tab**, click on the **Actions** button. A drop down menu is displayed.

Snow Clearing Services for Winter 2012-13 for Fort Garry Campus

Contract Request (Procurement) ID: CW2179421
Tasks: Incomplete Tasks: 1

Overview **Documents** Tasks Team Message Board History

Snow Clearing Services for Winter 2012-1...

Name	Owner	Status
No items		

Show Details **Actions**

- Search
- Upload
- Document
- Create
- Folder
- Analytical Report
- Compound Report
- Document
- Main Agreement
- Contract Addendum
- URL
- Form
- Shortcut
- Shortcut Here
- Subproject
- Download
- Documents

- ✓ Click Document under the heading Upload.
- ✓ Browse your computer to select the document you wish to add to your request.
 - This can include PDF or MS Office documents.

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- In the **Upload File** field select Choose File.
- Browse your computer for the desired document and select.
- Once chosen select the **Create** button.

- Once you have created your document in EPIC a screen will show confirming your selection, select **Done**.

Name	Owner	Status
Contract Type	Kirstine Ward	Draft

If you have several documents to upload repeat these steps for each document.

- Once all documents have been attached, return to the **Tasks Tab**.
- To complete the task, click the name **Attach Relevant Documents**

Name	Document	Owner	Status	Due Date
✓ Attach your Contract Document *	new contract request March 2017	Carol Schiamb	Complete	
✓ Add Signing Authority to Teams Tab *		Carol Schiamb	Complete	
🕒 Attach Relevant Documents *		Project Owner	Not Started	
🕒 Action	Contract Manual	Project Owner	Not Started	

- From the drop down menu select **Mark Complete**
- Congratulations! You have successfully uploaded your documents to your contract request!

Need Help?

- **Aurora Finance Customer Service** provides support with navigation & functions in the EPIC system:
 - ✓ Phone 204-480-1001 option 2 Email epic@umanitoba.ca
 - ✓ Aurora Finance Training Resources webpage http://umanitoba.ca/computing/renewal/aurora/finance/training/AF_trainingresources.html#Epic
- **Purchasing Services Customer Service** provides support in the procurement process & policies:
 - Phone 204-474-8348 Email purchasing@umanitoba.ca