

EPIC Cheat Sheet

When to create a... ?

<p>Purchase Request</p>	<p>When the pricing, quantity, scope of work and terms are known and there are no anticipated variances.</p> <p>E.g.</p> <ul style="list-style-type: none"> • Purchasing pens from Grand & Toy. • Business cards from Unigraphics. 	<ol style="list-style-type: none"> 1. In EPIC, click the Create button and select Requisition. 2. You will be brought to the Catalog tab. 3. Search for the items or use the filters available such as shop by supplier to look through a specific catalogue or choose the category of the items. <p>If you find your item in a catalogue, refer to the document How to Create a Catalog Request for detailed step by step instructions.</p> <p>If you cannot find the item you are looking but know the vendor that supplies it, you can create a Non-Catalog request. See our step by step guide for How to Create a Non Catalog Request.</p> <p><i>Not sure what vendor has the item you are looking for? Contact Purchasing Services at 474-8348 for assistance.</i></p>
<p>Contract Request</p>	<p>When there is an agreement between the University and a Supplier with anticipated variables:</p> <ul style="list-style-type: none"> • Price • Quantity • Scope of Work • Term <p>These can be:</p> <ul style="list-style-type: none"> • Service Agreements (non-individual) • Secondments • Informal/Department specific agreements • Construction projects and related agreements 	<p>Speak with Purchasing Services first to determine if it is truly best suited in a Contract Request or it could potentially be a PO. They will also tell you the forms that are required to be filled prior to creating your request in EPIC.</p> <p>Purchasing Services Phone: 474-8348 Email: purchasing@umanitoba.ca</p> <p>Once you have completed the necessary forms and have gathered your information, refer to the step by step guide of How to Create a Contract Request for detailed instructions.</p>

<p>Non PO Invoice</p>	<p>If the invoice relates to one of the expenses below:</p> <ul style="list-style-type: none">• Subscriptions - excluding licenses, software, other computer related items and subscriptions for individuals• Fees for:<ul style="list-style-type: none">○ Exhibitor○ Abstract or manuscript submission○ Reprint○ Commission• Page Charges• Journals• Directories• Permits• Sponsorship Payments <p>If none of these expense types are in the invoice you received, contact Purchasing Services to be advised on how to proceed with paying your invoice.</p>	<ol style="list-style-type: none">1. In EPIC, click the Create button and select Invoice.2. Fill out the following fields and information according to what is stated on the invoice:<ol style="list-style-type: none">a. Supplierb. Supplier Invoice #c. Invoice Dated. Ship toe. Upload Invoicef. All Required Documents Attachedg. Add Items <p>For detailed step by step instructions, refer to the document How to Create a Non-PO Invoice.</p>
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