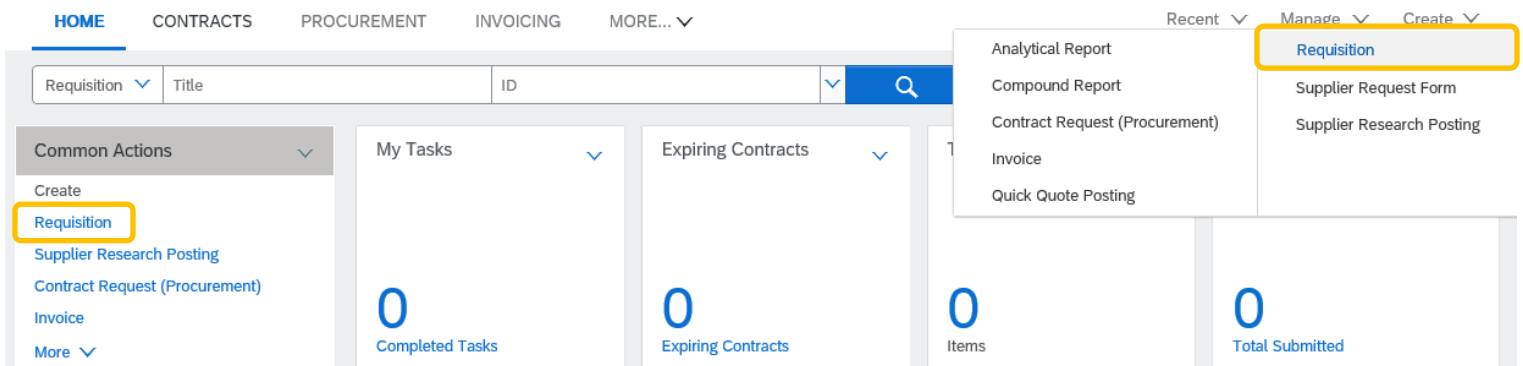


EPIC – Creating a Catalog Request

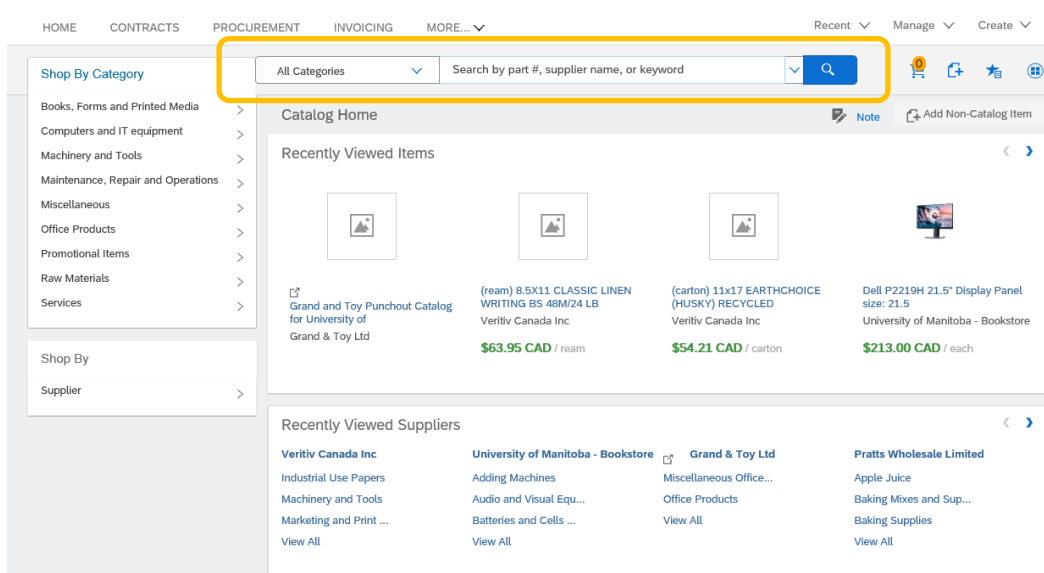
This guide has been prepared for you to provide step-by-step instruction on the Catalog request process in EPIC.

Creating a Catalog Request

- 1) Select **Requisition** to create a Catalog Requisition. This can be accessed either in the Common Actions box or the Create drop down menu.

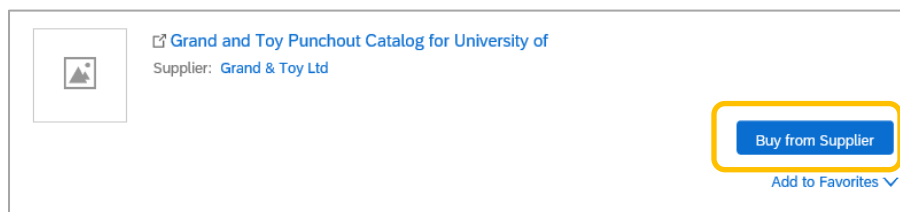


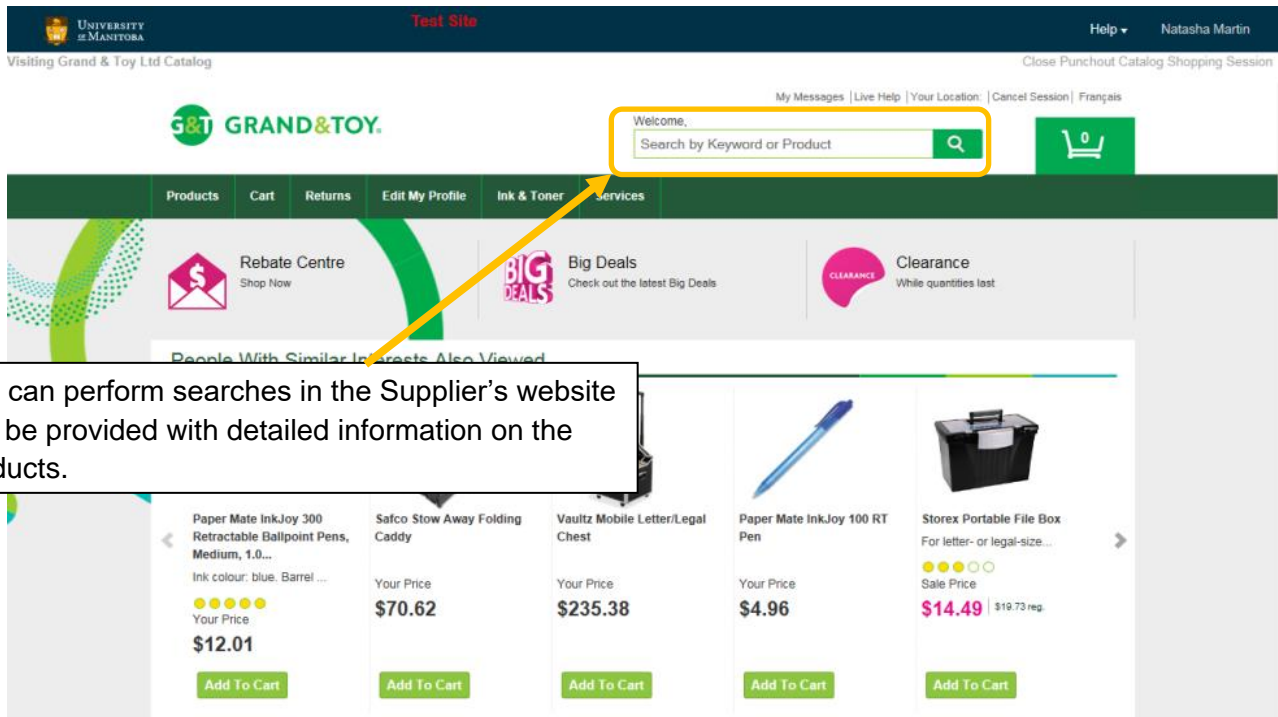
- 2) You will be re-directed to the Catalog Home tab. Here you can search for items or suppliers.



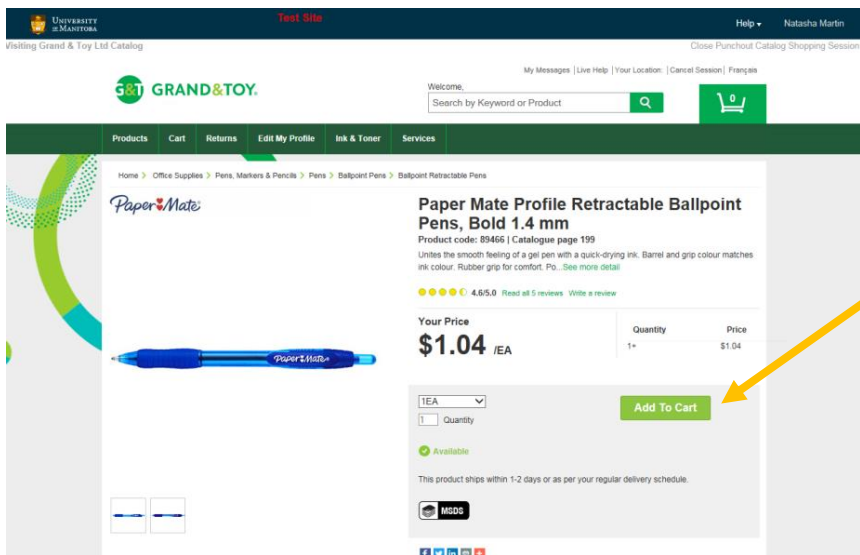
- 3) Some Suppliers have a Punchout Catalog. These types of catalogs are hosted on the supplier's own website where you may select items to purchase. To enter their catalog, select **Buy from Supplier**.

Note: Each Punchout Catalog is unique therefore the following steps may vary between websites.

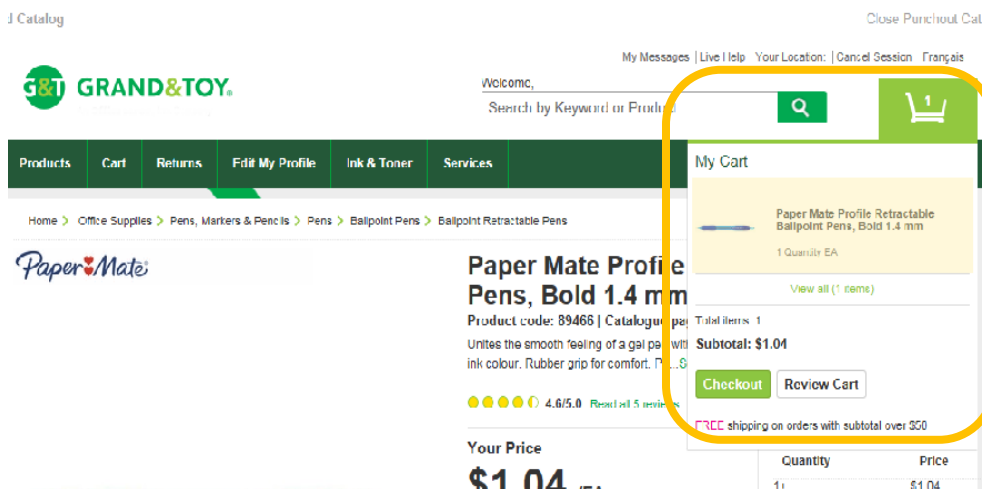




You can perform searches in the Supplier's website and be provided with detailed information on the products.



Click **Add To Cart** to add an item in your requisition.



A confirmation that you have added an item to your cart will appear.

When you have added all the items you desire, click the **cart icon** and select **Checkout**.

Shopping Cart

Product Code	Quantity	Unit	Product Description
	1	EA	Paper Mate Profile Retractable Ballpoint Pens, Bold 1.4 mm

Order Details

Paper Mate Profile Retractable Ballpoint Pens, Bold 1.4 mm \$1.04/EA Your Price \$1.04

- Ink colour: blue
- Barrel colour: semi-translucent blue for visible ink supply
- 12 per box

Remove

Available
This product ships within 1-2 days or as per your regular delivery schedule.

Product sku: 89466

Print Preview | Add to list | Cancel Order

Share Your Cart >

Proceed to checkout

You will be able to review your items once more before you leave the Catalog. Click **Proceed to Checkout** when satisfied.

Checkout

Final Inventory Check

Cancel Cart | Continue Building Cart | Check Out

This Cart is less than \$50.00
To add more items, click on Continue Building Cart. Otherwise, click on Submit Order.

Print Preview

Product Code	Quantity	Unit	Product Description	Your Price
	1	EA	Paper Mate Profile Retractable Ballpoint Pens, Bold 1.4 mm	\$1.04

Subtotal 1.04

Click **Check Out** to return to EPIC with the items you have selected.

PR55619

Paper Mate Profile Retractable Blue Ballpoint Pens... 1 x \$1.0700 CAD

Review Cart Proceed to Checkout

You will be returned to the catalog homepage with confirmation that your requisition has been created and you have added items.

Click on **Proceed to Checkout** to begin entering details of your request.

4) You will be brought to the Summary page of your requisition to finalize the request.

Note: If you are purchasing any items containing radioisotopes, there are specific approvals required to meet regulatory requirements. Please refer to the [guide](#) prepared by EHSO for further information on this process.

The following fields are required to be filled:

- Title
- Ship to
- Need-by Date
- Deliver To (this defaults as yourself but may be changed to another person)

a) Optional fields:

- Comments – You may choose to add comments for internal purposes or to relay information to the supplier. Select **Visible to Supplier** if you wish for the supplier to see the comments.

PR55619:

Summary

Title: *

Purchasing Unit: umanitoba

On Behalf Of: Natasha Ann Martin

Buyer: (no value)

F.O.B Shipping Instructions: (no value)

shipping instructions:

My Labels: Apply Label... ①

Ship To: * (no value)

Deliver To: * Natasha Ann Martin

Need-by Date: * ①

Comments:

Visible to Supplier

Attachments: Add Attachment

- Add Attachment:
 - Click **Add Attachment**.
 - In the following page, click **Browse**.
 - Search and select your document in the window provided then click **Open**.
 - Your document will appear in the field beside Browse to indicate it has been selected to be added to your request.
 - You can choose to click on the checkbox for **Visible to supplier on the purchase order**.
 - Click **OK** to be returned to the Summary Page.

Add Attachment

File: Browse...

Visible to supplier on the purchase order

- b) Entering accounting information:
- To enter the FOP for your items, scroll down to the Line Items section, select the item and click on **Actions** then **Edit**.

▼ Line Items

1 Item Total

No.	Type	Description
1		Paper Mate Profile Retractable Ballpoint Pens...

Supplier Part #: 89466
 Commodity Code: Ball point pens
 Supplier: Grand & Toy Ltd
 Contact: Grand & Toy Ltd
 Payment Terms: Net 30 Days
 Research Related?
 Commodity Justification: Yes
 Justification Required? No

Actions ▼ | Update Total

Copy
Edit
 Delete

- The Line Item Details page will open. Scroll down to the **Accounting – by Line Item** section to enter the FOP.

- Click on **OK** at the bottom or top of the page once the information is complete.

Accounting - by Line Item

Account Type: Expense ▼

Bill To: * Supplier Payment Services ▼

Fund: * (no value) ▼

Organization: * (no value) ▼

Account: 706003-Office Consumables ▼

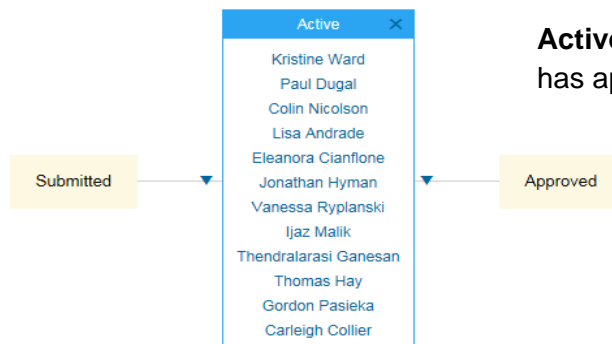
Program: * (no value) ▼

Activity: (no value) ▼

Location: (no value) ▼

- You will be returned to the Summary page of your requisition. Review your request once more to ensure all information is accurate. When satisfied, click on **Submit** to submit your purchase request for approval.

NOTE: Check the approval flow of your requisition. If you appear as the final approver, you will need to approve the request after the signing authority in order for a PO to generate. You must send the PO directly to the supplier.



Active signifies that no one has approved the request.