

EPIC APPROVALS

What you need to know as an Approver

Every transaction in EPIC requires a minimum of one approval – this is the financial authority approval to approve the expenditure. EPIC approvals are pre-configured in the system to meet the University's management process related to purchases and payments.

Approvers are automatically notified when a request requires attention. You will have the option to act on those requests either by email or directly in the EPIC system.

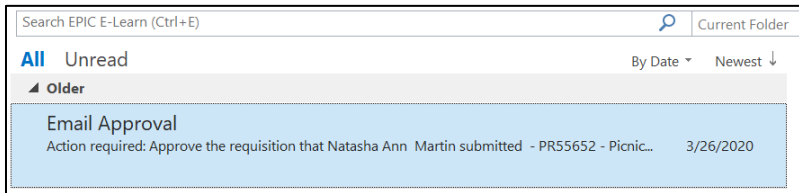
This document explains the steps required to approve requests from EPIC. ****Remember to review each request for appropriateness before making your decision to approve or deny.**

How do I approve EPIC requests by email?

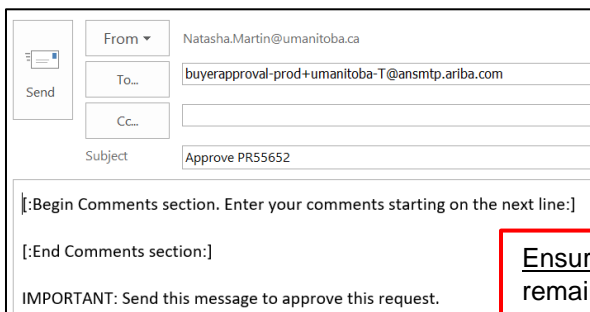
Purchase requests and non-po invoice requests that are created in EPIC can be approved by email.

To approve or deny by email, complete the following steps:

1. From your inbox, select the email with the subject line “**Action Required**”.



2. Once the email opens, review the details of the request. The information provided will include the name of the requestor, the items, price, quantity and FOAP being used for the purchase.
3. Click the button for **Approve** or **Deny** at the top of the email.
4. An email will compose to send your response back to the EPIC system.



Ensure the existing text remains in the email. This format is required for the system to read your response.

- You can include comments with your response by entering text in the designated body of the email.

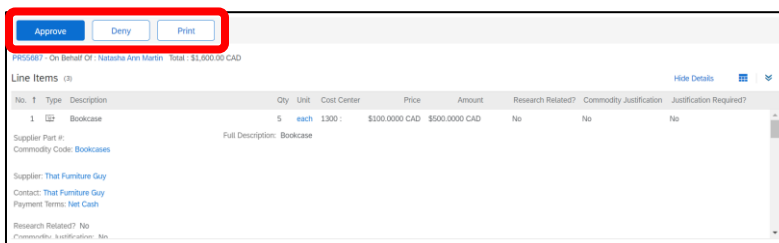
5. Click **Send** for your response to be returned to the system.

How do I approve purchase requests directly in EPIC?

You can approve requests in EPIC either by clicking **View** in the email you have received or by logging into JUMP if you have been granted full access to the system.

To access EPIC through an email:

1. From your inbox, locate the email with the subject line “**Action Required**”.
2. Once the email opens, click **View**.
3. A window will open to the sign on page for JUMP. Enter your **UMnetID** and **password** then click **Login**.
4. You will be immediately brought to the request to review the details. The option to Approve or Deny will be available in the same page.



- i. After you click **Approve** or **Deny**, you will have the option to include comments. Once satisfied, click **OK** to finalize your decision.
5. You will be brought to the next request requiring your attention. (if applicable)

To directly sign into EPIC:

1. Go to the JUMP sign on page (www.umanitoba.ca/jump).
2. Enter your UMnetID and password then click **Login**.
3. Once logged in, select **Finance** from the *Quick Links* box on the left side of the page.
4. On the Finance page, click **EPIC system** in the *Site Map* box. You will be automatically logged into the EPIC system.
5. You may encounter an Invalid fields message upon logging into EPIC. Click **OK** to continue.
6. On the **Home** tab, locate your To Do box to list all requests requiring your attention.
7. Click on Action Required to review and approve the request.

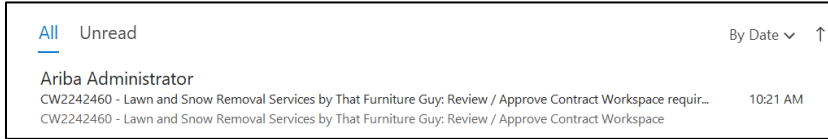
How do I approve contracts in EPIC?

Contract requests can only be approved directly in the system.

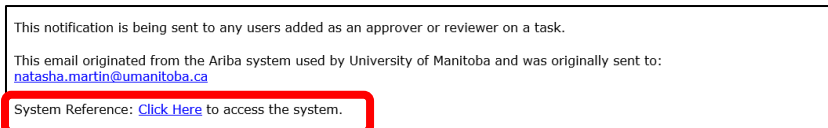
You can approve contracts in EPIC by accessing a link in the email you have received or by logging into JUMP directly if you have been granted full access to the system.

To approve or deny a contract:

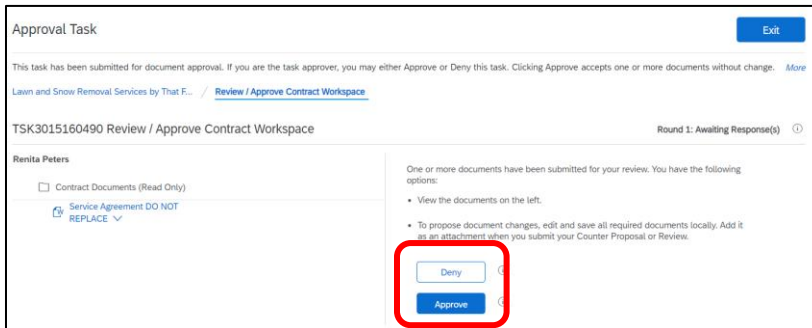
1. From your inbox, select the email with the subject line containing “**CW**” and “**Review / Approve Contract Workspace**”.



2. Once the email opens, click the link **Click Here** at the bottom of the page.



3. A window will open to the sign on page for JUMP. Enter your **UMnetID** and **password** then click **Login**.
4. You will be immediately brought to the contract to review the details. The option to **Approve** or **Deny** will be available in the same page.



- i. After you click **Approve** or **Deny**, you will have the option to include comments. Once satisfied, click **OK** to finalize your decision.

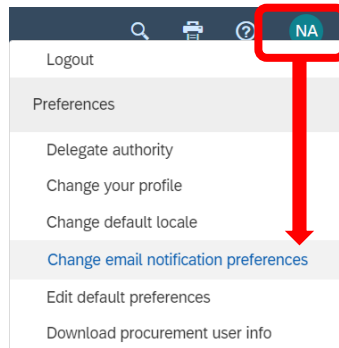
5. You will be brought to the contract workspace to view the progress of the contract request.

Changing Email Notification Preferences

You can choose the types of emails you receive and the frequency of each. If you would like to change your email notifications from EPIC, complete the following steps:

1. Log into JUMP with your UM ID and password.
2. Once logged in, select **Finance** from the **Quick Links** box. Select the EPIC **System** link in the Site Map box. You will be automatically logged into EPIC.

3. In EPIC, click on **your initials** at the top right corner of the page and select **Change email notification preferences** from the drop-down menu.



4. In the following page, select the document type you would like to modify for email notifications. (e.g. Requisition).
5. Options for Notification Method and Notification Frequency will appear in the page. Adjust to your preferences.

Note: Selecting **Consolidated emails** for Notification Method will require you to log into EPIC to approve or deny requests.

Edit Email Notification Preferences

For each document type listed, specify the types of email notification message:

Edit preferences for:

Notification Method

When I am an approver: ⓘ

When I am a watcher: ⓘ

Notification Frequency

Send email each time my document is approved: ⓘ

Send email when my document is fully approved: ⓘ

When I need to approve a document: ⓘ

When my approval is overdue: ⓘ

When I am a watcher: ⓘ

6. Click **Save** once you have made your updates.

The changes will take effect immediately.