An EPIC Contract Request is used to initiate your request to Purchasing Services to create a Service Agreement. This form is used when there is an agreement between the University and a registered Business or an Individual with a business registration number to perform specific services where the University’s standard agreement will be used.

**GETTING STARTED**

**Before you go into EPIC to start a contract request for a Service Agreement**

Get ready to start:
- Scan a copy of the required documents:
  - Description of Services
  - HR Approval
  - All related documents
- Know the total amount of the agreement and of any additional expenses if applicable.
- Know the Start and End dates of the agreement.
- Get the FOAP that will be used.
- Confirm who will be the signing authority. This is who will be authorizing the total amount to be charged to the Contract (EPIC access required).
- Define who the Department Contact/Contract Contact will be. This is the invoice approver which is equal to receiving and does not need to be an individual with signing authority.

**STARTING A REQUEST FOR A SERVICE AGREEMENT**

1. Click on the **Create** menu and choose **Contract Request** (Procurement).

2. Complete the following fields:
   - **Name**: The Supplier and a brief explanation of the expected service.
   - **Description**: Provide the full details of what will be included in the contract such as the type of services or goods to be provided by the supplier.
   - **What type of request is this?** Click in the field and select **Service Agreement** from the drop down.
   - **Is this an Amendment?** Select **No**.
   - **Supplier**: Choose the supplier for the contract.
     - **Commodity**: Choose the category of services or goods this contract is to provide. First search a broad description then refine your search to narrow down results. You can also view the Commodity Code Quick list: http://umanitoba.ca/computing/renewal/aurora/finance/1341.html
     - **FOAP**: Enter the FOAP for your contract.
       - **Account and Program codes**.
   - **Enter supplier email address (Optional)**: Provide the email of the supplier you have contact with so they will receive a copy of the final contract.
   - **Contract Amount**: Enter the amount of the contract for the Fiscal year.
   - **Are additional expenses applicable to this agreement?**: Click in the field and select **Yes** or **No**.
     - If you choose **Yes**:
       - Upon receipt of invoice(s), enter the maximum dollar value of additional expenses that will be paid in connection with the Services: Enter the maximum amount to be paid.
       - If there are expenses other than travel, accommodation and communication included in additional expenses, list them here: Enter the description of the additional expenses that are to be included.
   - **Department Name**:
   - **Department Address**:
   - **City Provincial Postal Code**: Enter the city, province and postal code of your department. (e.g. Winnipeg MB R3T 2N2)
n) **Department Contact**: Select the individual from the department that the supplier can contact.
   i) Click **Select**.
   ii) Search for the person in the field provided.
   iii) **Click** on the checkbox beside the name then click **Done**.

o) **Department Phone Number**: Enter the office phone number for the Department Contact.

p) **Date Fields**:
   i) **Start Date**: Enter the start date of the service agreement.
   ii) **Expiration Date (Optional)**: For internal billing purposes, Purchasing Services will enter a date that is one to two months past the end date to allow for invoice processing.
   iii) **End Date**: Enter the date you expect the services to be completed by.

3. Review all information.
4. **Click Create** once all required fields are filled.
5. **Your Contract Request Workspace** is created.
6. Complete the tasks listed in the **Tasks** tab. (See section **Completing Tasks in the Contract Request Workspace** for instructions.)

### Completing Tasks in the Contract Request Workspace

In the Contract Request Workspace you must complete tasks to complete your request and submit to Purchasing Services.

1. All the tasks required are listed on the **Tasks** tab. This is your checklist.

2. **Task 1—Add Signing Authority to Teams Tab**
   a) Select the **Team** tab.
   b) On the right side of the page, click **Actions** then select **Edit**.
   c) Click the **Signing Authority** field and select **Search More**.
   d) Enter the person’s name in the search bar provided then **click** **Search**.
   e) Locate the name in the listed results and select the **checkbox** beside it then **click** **Done**.
   f) You will be returned to the Team page, **click** **OK**.
   g) **Return to the Tasks** tab.
   h) **Click** on the task name. A drop down menu will appear.
   i) **Select Mark Complete**.

3. **Task 2—Attach Description of Services in Documents Tab**
   a) In the **Document column** beside the task name **click** on the link “**Contract Request Attaching Document Instructions—Description of Services Guide**”
      i) **A drop down menu** will appear.
      ii) **Select Replace Document**.
   b) **Select Browse** to find the scanned documents you saved then **choose Open** to pull your document into EPIC.
   c) **Select Replace**.
   d) Ensure the radio button beside the option “**Replace document by uploaded file**” is selected and **click OK**.
      i. **You will be prompted** to update the name of the document and add comments (optional). **Click Save**.
   e) You will be returned to the **Tasks** tab.
   f) **Click** on the task name. A drop down menu will appear.
   g) **Select Mark Complete**.

4. **Task 3—Attach HR Approval in Documents Tab**
   a) In the **Document column** beside the task name **click** on the link “**Contract Request Attaching Documents Instructions - HR Approval**”.
      i) **A drop down menu** will appear.
      ii) **Select Replace Document**.
   b) **Select Browse** to find the scanned documents you saved then **choose Open** to pull your document into EPIC.
   c) **Select Replace**.
   d) Ensure the radio button beside the option “**Replace document by uploaded file**” is selected and **click OK**.
      i. **You will be prompted** to update the name of the document and add comments (optional). **Click Save**.
   e) You will be returned to the **Tasks** tab.
   f) **Click** on the task name. A drop down menu will appear.
   g) **Select Mark Complete**.

5. **Task 4—Attach Additional Relevant Documents**
   This is an optional task if you need to add additional documents to your service agreement request. (If not needed, you can immediately select **Mark Complete**)
   **To add documents:**
   a) Navigate to the **Documents** tab.
   b) **Click Actions** (located on the right side) and in the drop down menu under Upload, select **Document**.
   c) **Click Browse** to locate and select the document.
   d) Once your document is selected, **click Create** then in the following page click **Done**.
   e) Your document is attached.
   f) **Return to the Tasks** tab. Finish the task by selecting **Mark Complete**.
6. Task 4—Submit Request

The final task must occur for Purchasing Services to receive your request and process your contract.

   a) Click on the task name and select View Task Details.
   b) In the following page, click Submit.

The contract request is now submitted to Purchasing Services for approval. If any additional information is required, you will be contacted directly.

**AMENDING AN EXISTING SERVICE AGREEMENT continued...**

Changes can be made to existing service agreements. These are called amendments. This can include extending the term, increasing the amount, changing the scope of work or the FOAP. This can only be done by the original requestor of the contract. If the original requestor has left the department, contact Aurora Finance to have the contract transferred to another person.

To make an amendment to a contract, follow the steps below:

1. Click Create from the Home Dashboard and select Contract Request (Procurement).
2. When the form opens, populate the following fields:
   (NOTE: You must be part of the Team members on the original contract in order to complete these steps)
   a) Name: Enter “Amendment—(Original Contract Title)”
   b) Copy from Contract
      i) Click the field for Copy from Contract and select Other.
      ii) Search for the original contract by ID (this begins with a CW) or name.
      iii) Locate the original contract in the results and click Select. You will be returned to the request form. This will populate part of the information in the form.
   b) Is this an Amendment?
      i) Click Yes.
      ii) The field Enter reasons for Amendment and C# in field below will appear. Enter what it is that you will be amending in the contract. E.g. Increasing amount or extending the term.
      iii) Contract Terms C#: Enter the C# in the field provided.
   c) Predecessor Project
      i) Click the field for Predecessor Project and select Other.
      ii) Search for the original contract by ID (the CW# of the contract) or name.
      iii) Locate the original contract and click Select. You will be returned to the request form. The remaining information will be populated in the form from the original contract request.
   d) Agreement Date:
      i) Enter the date that the amendment begins.

   e) Prompt to copy documents and team members from the previous project will appear at the bottom of the page. Select Yes or No.

If you choose Yes, in the Contract Request Workspace on the Team tab you must replace the Contract Manager with Purchasing Services Receptionist.

4. Make your edits as required. Once complete, click Create.
5. You will be brought to the Contract Request Workspace of your contract request.
6. Complete the tasks in the Tasks tab to complete the amendment request.

NOTE: You will need to obtain and upload HR approval for the amendment.
(See section Completing Tasks in the Contract Request Workspace for step by step instructions)

**MANAGING CONTRACT REQUESTS**

You may edit information as well as withdraw or close a contract request before it is approved by Purchasing Services.

How to check if your request is still “In Approval”:

1. Click on the Tasks tab.
2. View the status for “Submit Request”. If it has not yet been approval the status will state “In Approval”.

To Edit information:

1. Click on the Overview tab to edit FOAP, supplier, etc.
2. Locate the information that you would like to change. At the level of the section title, on the right side, click Actions then select Edit.
3. You can edit the information as required then click OK.

   Hint: To edit Contract Request Title, click Actions in the Overview section.

To Withdraw a request if not approved:
If you want to wait to proceed with a contract, you can withdraw the request and submit it again later.

1. Click the Tasks tab.
2. Click the task titled Submit Request then in the drop down menu choose View Task Details.
APPROVING AN INVOICE ON A CONTRACT

Contract Invoices will appear in your To Do box with the action required of Approve.

1. Locate the IR in the To Do box.
2. Click the action required Approve.
3. The IR will open. You can review the original invoice by selecting the uploaded pdf version.
4. After reviewing the invoice, click Approve.

Errors on the invoice?
- Contact the Supplier to request a credit and corrected invoice.
- Ensure the credit is provided to Supplier Payment Services (SPS).
- Once the credit is applied, approve the IR.

Work has not been completed?
- Wait until it has been completed to approve.
- Add a comment in the IR for SPS to be aware of the situation.

REPORTS

There are a number of EPIC reports available to you, to keep track of the contracts in your department:

- My Open Contracts
  Provides information for contracts still open under your name, someone else’s or your entire department.
- Contract Amount Left
  Able to give you information on how much money is left on a contract.
- Invoice Summary Report by Contract
  Provides a list of invoices that have been applied to your Contract.

For further instructions on running reports, refer to the EPIC reporting guide available here:

OTHER RESOURCES

Additional resources to assist with contract requests and related tasks are available at:
http://umanitoba.ca/computing/renewal/aurora/finance/training/AF_trainingresources.html

Need help navigating EPIC?
Contact Aurora Finance at 480-1001 Option 2 or email epic@umanitoba.ca.

Questions for Purchasing Services regarding your Contract?
They can be reached by email at Purchasing@umanitoba.ca or by phone at 474-8348.

HINTS AND TIPS

To search for a Contract Workspace (CW):

1. In the search bar, choose the document type Contract Workspace (Procurement).
2. Enter the CW# or Title in the field provided and click the magnifying glass icon to execute the search.
3. Locate the contract in the search results and click the title of the contract then Open.

Searching Contracts

You can view any contract in EPIC, regardless if you or another person created it.

To search for a Contract if it is complete:

1. In the search bar, choose the document type Contract.
2. In the ID field, enter the contract number (C#). The “C” must be capitalized. Click the magnifying glass icon to execute search.
3. Click on the contract in the results list to view information.