How to Create a Contract Request
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How to Create a Contract Request

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The EPIC Contract Request

What it Is and When to Use it

The Contract Request is a form in EPIC used to initiate your request to Purchasing Services to create a Contract. This form is used when there is an agreement between the University and a Supplier to perform specific services or provide particular goods with anticipated variables including:

- Price - The final cost of the items and/or service
- Quantity - How many items or amount of service required
- Scope of Work - Description of what will be provided
- Term - Defined timelines – start & end dates

Contract Requests are generally used when written agreements with negotiated terms approved by all parties involved have been finalized.

A Contract Request may include, but are not limited to:

a) Service Agreements with a business or an Individual with a business registration number (GST#).

b) Secondment Agreements with a business.

c) Construction projects & related agreements.

d) Informal/Department specific agreements (e.g. maintenance, utilities).

There are two types of Contract Requests:

1) Service Agreements (Non-Individual): The University engages a supplier to perform defined services based on a mutually binding agreement. The University’s standard terms and conditions agreement will be used.

Note: Service Agreements in EPIC can only be to suppliers. An individual who has a business number is considered a supplier and can be processed in EPIC. Service Agreements to individuals without a business number are outside the system and should be submitted to Purchasing Services on the appropriate paper form(s) available on the Financial Services forms website.
2) **Contracts (Signed Agreements):** The Supplier provides their own agreement to the University, which is reviewed and approved. These types of contracts may be construction projects or related agreements.

If you are uncertain if your transaction should be submitted on a Contract Request, contact Purchasing Services for assistance, or visit their website for current contact info http://umanitoba.ca/admin/financial_services/purch/purchase.html

You may contact the team by email purchasing@umanitoba.ca or by phone 204-474-8348.

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**Creating a NEW Contract Request**

**Getting Started**

Before you log into EPIC to create a Contract Request make sure you have all your required information and documents readily available to you so that you can complete the process.

Visit the Purchasing Services website for procedures and forms required before starting your request in EPIC: [http://umanitoba.ca/admin/financial_services/purch/contracts.html](http://umanitoba.ca/admin/financial_services/purch/contracts.html)

To begin the Contract Request process in EPIC you will need:

- A scanned copy of the following documents:
  - Description of Services *(For Service Agreements Only)*
  - Human Resources Approval *(For Service Agreements Only)*
  - Signed Agreement *(For Contracts Only)*
  - Any additional related documents (e.g. Quotes)
- The total amount of the agreement
- The FOAP that will be used
- Itemized additional costs and amounts if applicable *(For Service Agreements Only)*
- The person that the supplier will contact
- Department address and phone number
- Start and End dates of the agreement
- Signing authority with EPIC access (this is who will be authorizing the initial contract setup)
- Contract Contact (this is who will be approving invoices which is equal to receiving)

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In EPIC you can begin your request from the **Common Actions** or from the **Create menus**

- **From Common Actions**
  - Locate the ‘**Common Actions**’ box on the left side of the screen.
  - Select **Contract Request (Procurement)**.

- **From the Create menu**
  - Click on the ‘**Create**’ menu at the upper right side of the screen.
  - Select **Contract Request (Procurement)**

The initial request form will be displayed.
Completing the Contract Request Form for a Service Agreement

The initial form is where you will provide key details related to your request such as what the agreement is for, the Supplier, the commodity code, the term of the agreement, and the FOAP.

You must complete the fields on the request form where an asterisk is displayed. Fields without an asterisk are optional.

There are different fields depending on the type of request you are creating.

Follow these initial steps to complete the form:

**Step 1: Provide a Name for your Request**
- In the **Name** field, provide a name for your contract. Names should identify what the contract is for.
  
  **For example, Snow Clearing Services Winter 2020**
  
  *Note: Purchasing Services may change the name of the contract during the setup.*

**Step 2: Add a Description of your request**
- In the **Description** field, 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.
  
  *For Service Agreements, you can enter “See Description of Services”.*

**Leave Field Blank – Copy from Contract**
- The field labeled **Copy from Contract** allows you to copy previous contract requests and should only be used when creating amendments to existing contracts.
  
  o If you use this copy feature it is important to change the **Contract Manager** on the team tab to the **Purchasing Services Receptionist** group – otherwise the request will not be sent to Purchasing Services when submitted.

**Default Field – Test Project**
- **Test Project** field defaults to No.
  
  o It is important to not change this toggle as Purchasing Services will not receive your request if it is changed.

**Step 3: Choose your contract type.**
- **What type of request is this?** The field defaults to **Contract**. Click in the field and select **Service Agreement** from the drop down menu.
  
  o This field defines the fields you will see in the form. The required information for creating your request will display such as Supplier, Contract Amount, and Start Date.
Step 4: Identify if it is an amendment.

- **Is this an Amendment?** Select **No**.
  - This field is used to identify if you are creating a contract request to amend an existing contract. When choosing Yes in this situation, an additional field will appear to provide a Reason for Amendment.

**Leave field blank – Predecessor Project**

- The field **Predecessor Project** is another field that allows you to copy over information from an existing contract. It is to only be used for contract amendments.

Step 5: Choose the Supplier.

You need to identify who the Supplier is on the agreement.

- To select the **Supplier**:
  a. Click the drop down arrow beside the **Supplier field**.
  b. Select **Search for More**, a search screen is displayed.
  c. In the search field type the suppliers name & click **Search**.
  d. Your search results will be displayed.
  e. When you locate the desired supplier, click the **radio button** beside the suppliers name to select.

**Note:** If the required supplier is not available you may need to request a new supplier to be added. To request new suppliers, complete the **Supplier Request Form** and submit to Purchasing Support Services via email at **Supplier_Support@umanitoba.ca**

Optional field – Enter Supplier email address

- You have the option to fill in the field **Enter Supplier email address**, so that the supplier can receive a copy of the final contract by email.

Step 6: Define the Currency & Contract Amount

- You will need to enter the amount of the contract in the correct currency. This amount should be for the current fiscal year only to ensure that you are not over committed on your budget. If your agreement is for multiple years, the details of the amounts for future years can be added in the Payment Terms section.

- By default, Canadian dollars (CAD) are defaulted to the contract amount field. If you need to change the currency you should do this before you enter the amount to avoid any conversion errors.

- To change the currency follow these steps:
  a. Click the **CAD** link beside the **Contract Amount** field.
  b. Select **Other**, a search screen is displayed.
  c. Type in the desired currency name or scroll through the list to view available options.
  d. When you locate the correct currency, click the **Select** icon.
  e. Your currency has been updated.

- To enter the **Contract Amount** simply type in the dollar value for the current fiscal year.
  - This amount is the anticipated expense related to the agreement. This is the amount that will be visible as the commitment in BANNER/FAST.
Step 7: Choose a Commodity Code

- A commodity code defines what the service or items are. These codes assist in the management of transactions in EPIC as well as reporting.
- To search for an appropriate code:
  a. Click the drop down arrow beside the Commodity field.
  b. Select Search for More. A search screen is displayed.
  c. In the search field type a name that describes the item or service.
  d. Click Search. Your search results are displayed.
  e. Once you find a commodity that fits, Click the Checkbox beside the commodity name then select Done.
  f. The selected commodity code has been populated in the field on your request.

Step 8: Enter your FOAP

- Every transaction that is processed through EPIC requires a FOAP in order to record commitments for budget management and to record expenditures as payments are processed.
- The contract request form only allows the entry of one FOAP however when the actual contract is setup, Purchasing Services can include split accounting if required.
- If you have more than one FOAP which is required for the contract, choose 1 to complete in the fields in the following steps and use the Payment Terms box to enter all FOAPs and desired allocations.

To enter your FOAP follow these steps:

  a. In the Fund field type the appropriate fund number and tab – your Fund is populated.
  b. Repeat this action for each element to enter the Organization, Account and Program.

You can also search the chart of accounts. Follow these steps to search:

  a. Click the drop down arrow beside the chart element field e.g. Fund.
  b. The search screen is displayed.
  c. Enter the number or name of the desired Fund and click Search.
  d. All available options are displayed.
  e. Locate the desired code and click the checkbox beside the appropriate element.
  f. Click Done.
  g. The selected element is populated in the field.
  h. Repeat these steps to enter the Organization, Account and Program codes.

Optional Field – Payment Terms

- The ‘Payment Terms’ field is an optional field and can be left blank or used to define split accounting, multiple annual payments (fiscal year spend limits) or other information related to the payment cycle not identified in the contract agreement documents. These fields are text fields and you can simply type in the desired information.

Step 9: Provide the Department Name and location.

- Enter your Department Name. E.g. Comptroller’s Office
- Enter Department Address. E.g. 416 Administration Building, 66 Chancellor’s Circle
- Enter the City Provincial Postal Code. E.g. Winnipeg, MB R3T 2N2

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Step 10: Identify the Department Contact and provide their office phone number.

- This person should be who the supplier can contact within your department.
- To choose a contact:
  a. Click Select beside the field Department Contact.
  b. In the search window, type in the name of the individual then click Search.
  c. Once you find the person, select the checkbox beside the name and choose Done.
- Enter the Department Contact’s office phone number in the Department Phone Number field.

Step 11: Contract dates.

- The contract dates define when the contract agreement starts and ends.
- Complete these additional fields at the top right of the screen by following these steps:
- Scroll up to top of the page:
  ✓ The Agreement Date can be left blank. This date field is only used for Amendments.
  ✓ The Start Date is the date that the contract begins and must be populated.
    o Beside the Start Date field click the calendar icon and select the start date of the contract.
  ✓ The Expiration Date is optional. This date is 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.
    o Beside the Expiration Date field click the calendar icon and select the expiration date of the contract.
  ✓ The End Date is the date you expect the services to be completed by.
    o Beside the End Date field click the calendar icon and select the end date of the contract.

FINAL STEP: Complete your Form

The initial form is complete and your contract request is ready for the next step

a. Click the Create button.

b. BUT you are not done yet! Please move to the next section, Completing Tasks for a Service Agreement to complete your request.
Completing the Contract Request Form for a Contract (Signed Agreement)

The initial form is where you will provide key details related to your request such as what the agreement is for, the Supplier, the commodity code, the term of the agreement, and the FOAP. You must complete the fields on the request form where an asterisk is displayed. Fields without an asterisk are optional.

Follow these initial steps to complete the form:

**Step 1: Provide a Name for your Request.**
- In the Name field provide a name for your contract. Names should identify what the contract is for.
  
  **For example, Snow Clearing Services Winter 2020**
  
  Note: Purchasing Services may change the name of the contract during the setup.

**Step 2: Add a Description of your request.**
- In the Description field - provide details defining what the contract is for.
  
  **For example, “Daily snow clearing of all walkways, entrances and stairwells at Bannatyne campus for winter 2020”**

Leave Field Blank – Copy from Contract.
- The field labeled Copy from Contract allows you to copy previous contract requests and should only be used when creating amendments to existing contracts.
  
  - If you use this copy feature it is important to change the Contract Manager on the team tab to the Purchasing Services Receptionist group – otherwise the request will not be sent to Purchasing Services when submitted.

Default Field – Test Project
- Test Project field defaults to No.
  
  - It is important to not change this toggle as Purchasing Services will not receive your request if it is changed.

**Step 3: Choose your contract type**
- What type of request is this? field defaults to Contract. If your request is a Service Agreement, click in the field and select Service Agreement from the drop down menu.
  
  - This field defines the fields you will see in the form. The required information for creating your request will display such as Supplier, Contract Amount, and Effective Date.

**Step 4: Identify if it is an amendment.**
- In the field Is this an Amendment? select No.
  
  - This field is used to identify if you are creating a contract request to amend an existing contract. When choosing Yes in this situation, an additional field will appear to provide a Reason for Amendment.

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Leave field blank – Predecessor Project

- The field Predecessor Project is another field that allows you to copy over information from an existing contract. It is to only be used for contract amendments.

Step 5: Choose the Supplier.

You need to identify who the Supplier is on the agreement.

- To select the Supplier:
  a. Click the drop down arrow beside the Supplier field
  b. Select Search for More, a search screen is displayed
  c. In the search field type the suppliers name & click Search
  d. Your search results will be displayed.
  e. When you locate the desired supplier, click the ‘Select’ icon by the suppliers name

Note: If the required supplier is not available you may need to request a new supplier to be added. To request new suppliers, complete the Supplier Request Form and submit to Purchasing Support Services via email at Supplier_Support@umanitoba.ca

Step 6: Supplier Email Address

- In the field Enter Supplier email address, provide the Suppliers email address so that the supplier can receive a copy of the final contract from Purchasing Services.

Step 7: Define the Currency & Contract Amount

- You will need to enter the total amount of the Service Agreement without the allowable expenses in the correct currency. If your agreement is for multiple years, you must detail the fiscal commitment amounts for future years in the Payment Terms section.
- By default, Canadian dollars (CAD) are defaulted to the contract amount field. If you need to change the currency you should do this before you enter the amount to avoid any conversion errors.
- To change the currency follow these steps:
  a. Click the CAD link beside the Contract Amount field
  b. Select Other, a search screen is displayed
  c. Type in the desired currency name or scroll through the list to view available options
  d. When you locate the correct currency, click the Select icon
  e. Your currency has been updated

- To enter the Contract Amount simply type in the dollar value for the current fiscal year. ✓ This amount is the anticipated expense related to the agreement. This is the amount that will be visible as the commitment in BANNER/FAST.
Step 8: Are additional expenses applicable to this agreement?

- The field Are additional expenses applicable to this agreement? refers to any additional expenses that could be incurred during the course of the agreement that will be covered as well. This could include phone calls, courier costs, airfare, parking, transportation, taxi, accommodation, etc.
- Click in the field beside Are additional expenses applicable to this agreement? and choose Yes or No from the drop down.
- If you choose Yes, two additional fields will appear:
  ✓ 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 of additional expenses that will be paid.

  To change the currency follow these steps:
  a. Click the CAD link beside the Contract Amount field.
  b. Select Other, a search screen is displayed.
  c. Type in the desired currency name or scroll through the list to view available options.
  d. When you locate the correct currency, click the Select icon.
  e. Your currency has been updated.

  ✓ If there are expenses other than travel, accommodation and communication included in additional expenses, list them here: enter any additional expenses that may be included beyond what has been already mentioned.

Step 9: Choose a Commodity Code.

- A commodity code defines what the service is for. These codes assist in the management of transactions in EPIC as well as reporting.
- To search for an appropriate code:
  a. Click the drop down arrow beside the Commodity field
  b. Select Search for More. A search screen is displayed
  c. In the search field type a name that describes the item or service
  d. Click Search. Your search results are displayed.
  e. Once you find a commodity that fits, Click the Checkbox beside the commodity name then select Done
  f. The selected commodity code has been populated in the field on your request

Step 10: Enter your FOAP.

- Every transaction that is processed through EPIC requires a FOAP in order to record commitments for budget management and to record expenditures as payments are processed.
- The contract request form only allows the entry of one FOAP however when the actual contract is setup, Purchasing Services can include split accounting if required.
- If you have more than one FOAP which is required for contract, choose 1 to complete in the fields in the following steps and use the Payments Terms box to enter all FOAPs and desired allocations.
- To enter your FOAP follow these steps:
  a. In the Fund field type the appropriate fund number and tab – your Fund is populate.
  b. Repeat this action for each element to enter the Organization, Account and Program

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• You can also search the chart of accounts. Follow these steps to search:
  a. Click the drop down arrow beside the chart element field e.g. Fund.
  b. The search screen is displayed.
  c. Enter the number or name of the desired Fund and click Search.
  d. All available options are displayed.
  e. Locate the desired code and click the checkbox beside the appropriate element.
  f. Click Done.
  g. The selected element is populated in the field.
  h. Repeat these steps to enter the Organization, Account and Program codes.

Optional Field – Payment Terms.

• The ‘Payment Terms’ field is an optional field and can be left blank or used to define split accounting, multiple annual payments (fiscal year spend limits) or other information related to the payment cycle not identified in the contract agreement documents. These fields are text fields and you can simply type in the desired information.

Step 10: Provide the Department Name and location in the corresponding fields.

• Enter your Department Name. E.g. Comptroller’s Office
• Enter Department Address. E.g. 416 Administration Building, 66 Chancellor’s Circle
• Enter the City Provincial Postal Code. E.g. Winnipeg, MB R3T 2N2

Step 11: Identify the Department Contact and provide their phone number.

• This person should be who the supplier can contact within your department.
  • To choose a contact:
    a. Click Select beside the field Department Contact.
    b. In the search window, type in the name of the individual then click Search.
    c. Once you find the person, select the checkbox beside the name and choose Done.

• Enter the phone number in the Department Phone Number field. E.g. 204 480 1001

Step 12: Contract dates.

The contract dates define when the contract agreement starts and ends and will be displayed on the final agreement shared with the supplier.

Complete these additional fields by following these steps:

  ✔ The Agreement Date is left blank. This date field is only used from Amendments.
  ✔ The Start Date is the date that the contract begins and must be populated
    o Beside the Start Date field click the calendar icon and select the start date of the contract.
  ✔ The Expiration Date is an optional field. It is the date the contract ends for internal billing purposes. Purchasing Services will enter the date one to two months after the actual end date of the contract.
  ✔ The End Date is the date that you expect the services to be completed by.
    o Beside the End Date field click the calendar icon and select the end date of the contract.

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FINAL STEP: Complete your Form.

The initial form is complete and your contract request is ready for the next step

a. Click the Create button.

b. BUT you are not done yet! Please move to the next section, Completing Tasks for a Contract, to complete your request.
Working in Your Request Workspace

Once your initial details have been entered on the contract request form, a contract request workspace is generated. You have been assigned a **Contract ID (CW Number)** number in the upper right hand corner of screen. All the information you entered is visible and editable in this workspace. Additionally there are key tasks that need to be completed to finalize your request and submit to Purchasing Services to process.

There are multiple tabs on a Contract Request - the TASKS tab will be a focus for you to complete your request and is your checklist of what needs to be completed. Before we move on, let’s take a quick tour of the tabs.

- The **Overview tab** is a summary of the information you inputted on the initial request form.
  - Any of the information can be edited on this page by selecting the **Actions** option in any of the fields and selecting **EDIT**

- The **Documents tab** holds all documentation required to process your request. This will include signed agreements, details of the work to be completed or internal University forms.

- The **Tasks tab** is your checklist; this tab includes the steps that must be completed before you can submit your request.

- The **Team tab** identifies everyone that has access to the contract. This tab automatically includes you and Purchasing Services. Please do not change these 2 fields. This tab is also where you will add the signing authority.

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• The ‘Message Board’ tab is a communication tab which allows team members to transfer information within the contract workspace. This tab is not used at the University of Manitoba.

• The ‘History’ tab provides a detailed list of all actions that have been performed on the request. This includes additions or deletions of documents, approvals, comments, etc.

To continue creating your request click the ‘Tasks’ tab.

✓ Remember this is your checklist and includes all the steps you need to complete in order to process your request.
✓ Incomplete tasks will cause the request to not move forward.
Completing Tasks

The tasks tab includes all the steps you need to complete to finalize your request and submit to Purchasing Services to setup up the contract or service agreement.

There is a different set of tasks for the Contract than the Service Agreement. Also, the documentation required can vary. Common examples of required documentation include:

- **FOR Service Agreements required attachments include:**
  - Description of Services
  - HR Approval
  - Supporting documentation – this may include quotes and/or communications with the Supplier

- **FOR Contracts, required attachments to include for the following agreements:**
  - **Construction projects (for Physical Plant & Purchasing Only)**
    - Signed Agreement from supplier (DCA, CCDC, CCDC2, ICA, etc.)
    - Supporting documentation - this may include quotes, emails or other correspondence
  - **Supplier’s provided agreement**
    - Signed Agreement from supplier
    - Supporting documentation - this may include quotes, emails or other correspondence
  - **Secondment Agreement**
    - Completed University of Manitoba Secondment Agreement
    - Supporting documentation - this may include quotes, emails or other correspondence
  - **No official Contract with the supplier**
    - Supporting documentation - this may include quotes, emails or other correspondence
    - Documentation for this type of contract will vary. All agreements either written or verbal must include at least one document to process in the system.

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Completing Tasks for a Contract (Signed Agreement)

Task 1 – Attach your Contract Document

The instructional document, called the “Contract Request Attaching Documents Instructions”, is automatically added to the first task in the Contract Request Workspace and must be replaced with the appropriate documents as outlined above before you can submit your request to Purchasing Services.

This task is your reminder to attach the contract documents in EPIC so that Purchasing Services receives them. All documents must be complete and signed.

To fulfill this task you must replace the instruction document provided on the task.

a. To replace, click the document name in the document column.
b. A drop down menu is displayed.

c. Select Replace Document. The following screen is displayed:

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d. Remember you need to have a scanned copy of the documents available.

e. Leave the radio button to the default selection of Upload.

f. Select **Browse** and locate the desired file on your computer.

g. Once you have selected the file choose the **Replace** button.

h. The following message will display. Change the radio button to **Replace document by uploaded file** and select **OK**.

![Replace Document](image)

i. By default the title will display as the file name you had saved the document as. You can change the document name here if desired. Click **Save** to proceed.

j. Your new document has now replaced the instructional document in EPIC on the first task as well as on the **Documents** tab.

![Task Drop Down](image)

k. To complete this task, click on the task name. A drop down box will display.

l. Select **Mark Complete** and move to Task 2.
Task 2 – Add Signing Authority to Team tab

Unlike the Purchase Requisition process in EPIC, our signing authority information is not connected to your FOP in contracts; this means you will need to identify who the signing authority will be for the contract. This individual must have either primary or alternate signing authority on the selected FOP and must have EPIC access to perform the approval.

a. To add a signing authority to the team tab, click on the Team tab.
b. Once on the Team tab, click Actions and select Edit.

c. The following will be displayed:

![Team Members Table]


d. Click on the drop down arrow by the Signing Authority field and select Search More.
e. In the search window type in the name of the individual then click Search.
f. Once you find the person select the checkbox beside the name and choose Done.

![Choose Values for Members]

g. Click OK. Your signing authority has been applied.
h. Return to the task tab and select the title of Task 2 to Mark Complete.

Note: There is no signing authority Approval on a Contract Request, this will occur when Purchasing Services initiates the Contract setup.
Task 3 - Attach Additional Relevant Documents

This task provides the option to add more documentation to your request which may be required.

If you need to add more documents beyond the contract agreement added on Task 1 you can attach these on the Documents tab.

**Note:** Many contracts will not require additional documents as most documentation can be added as 1 file on Task 1. If you have no additional documents to add, you can simply mark the task as complete as demonstrated above. Some examples of additional documents include quotes, emails/communications with suppliers or Purchasing Services, letters of agreement etc.

If you wish to add additional documents follow these steps:

a. From the Documents tab, select the Actions button. A drop down menu is displayed.

b. The following page will display:

   ![Image](image.png)

   Under the heading Upload, select Document.

   ![Image](image.png)

   You can browse for files on your computer to add to your request.

   ![Image](image.png)

   The Description will be displayed as the title of your document.

   ![Image](image.png)

   Review the document you have uploaded. You can edit the description information or delete the document by selecting the Actions button at this stage if required.

d. Once you have selected your document, click Done to add it to your request.

e. Return to the Task tab and select the title of Task 3 to Mark Complete.
Task 4 - Submit Request

The final task in your contract request workspace is to send the request to Purchasing Services to process. This task represents the only required approval on a contract request.

This approval will appear on all contract requests and is the final task that you need to complete to send the request to Purchasing Services.

✓ If other approvals are added they must be completed before you can submit your request. Please note that in most cases you should not be adding approvals to your contract request.

If you hover over the name of any task the instructions for how to complete the task are displayed. These are also visible when you view the task in the next step.

a. Click the task title Submit Request to view a dropdown menu.
b. Select View Task Details.
c. The following page will be displayed:

d. If you have any additional information you would like to provide Purchasing Services on the request, type the details in the Message box or add an Attachment.
e. Scroll down to the bottom of the page to find the Submit button.
f. Click Submit. You are returned to the Tasks tab.
Note: The task status has changed to In Approval.

- You can view the status of your approvals by accessing your contract request and reviewing the status of the approval on the Tasks tab. An approved request will have the status of Approved.

Congratulations you have successfully created a NEW Contract Request!
- Purchasing Services will review and may contact you if they require additional information before setting up the contract.
Completing Tasks for a Service Agreement

Task 1 – Add Signing Authority to Team tab

Unlike the Purchase Requisition process in EPIC, our signing authority information is not connected to your FOP in contracts; this means you will need to identify who the signing authority will be for the contract. This individual must have either primary or alternate signing authority on the selected FOP and must have EPIC access to perform the approval.

a. To add a signing authority to the team tab, click on the Team tab.
b. Once on the Team tab, click Actions and select Edit.

c. The following will be displayed:

   ![Team Members]

   - Click on the drop down arrow by the Signing Authority field and select Search More.
   - In the search window type in the name of the individual then click Search.
   - Once you find the person select the checkbox beside the name and choose Done.

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g. Click OK. Your signing authority has been applied.

h. Return to the task tab.

i. To complete this task, click on the task name. A drop down box will display. Select Mark Complete.

Note: There is no signing authority Approval on a Contract Request, this will occur when Purchasing Services initiates the Contract setup.

Task 2 – Attach Description of Services in Documents Tab

The instructional document, called the “Contract Request Attaching Documents Instructions - Description of Services Guide”, is automatically added to the second task in a Service Agreement and must be replaced with the appropriate documents before you can submit your request to Purchasing Services.

This task is your reminder to attach the Description of Services document in EPIC so that Purchasing Services receives it to include with the final agreement to the Supplier.

To fulfill this task you must replace the instruction document provided on the task.

a. To replace, click the document name in the document column. A drop down menu is displayed:

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b. Select **Replace Document**. The following screen is displayed:

![Replace Document Screen]

- **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
- **Leave the radio button to the default selection of Upload.**
- **Select Browse** and locate the desired file on your computer.
- **Once you have selected the file choose the Replace button.**
- **The following message will display. Change the radio button to Replace document by uploaded file and select OK.**

- **By default the title will display as the file name you had saved the document as. You can change the document name here if desired. Click **Save** to proceed.**
- **Your new document has now replaced the instructional document in EPIC on the first task as well as on the Documents tab.**
- **To complete this task, click on the task name. A drop down box will display.**
- **Select Mark Complete and move to Task 3.**
Task 3 – Attach HR Approval in Documents Tab

The instructional document, called the “Contract Request Attaching Documents Instructions HR Approval Attaching Documents Instructions”, is automatically added to the third Task in every Service Agreement and must be replaced with the appropriate documents before you can submit your request to Purchasing Services.

This task is your reminder to attach the HR Approval in EPIC so that Purchasing Services receives it with your request. Your HR Approval can be submitted as an outlook file, word document, or PDF document.

To fulfill this task you must replace the instruction document provided on the task.

a. To replace, click the document name in the document column.

b. A drop down menu is displayed.

Test

Contract Request (Procurement)

<table>
<thead>
<tr>
<th>Name</th>
<th>Document</th>
<th>Owner</th>
<th>Status</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Signing Authority to Teama Tab *-</td>
<td>Description of Services Form</td>
<td>Natasha Martin</td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>Attach Description of Services in Documents Tab *-</td>
<td>Contract Request Attaching Documents Instructions HR Approval *-</td>
<td>Natasha Martin</td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>Attach HR Approval in Documents Tab *-</td>
<td></td>
<td>Project Owner</td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Attach Additional Relevant Documents *-</td>
<td></td>
<td>Project Owner</td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Submit Request *-</td>
<td></td>
<td>Project Owner</td>
<td>Not Started</td>
<td></td>
</tr>
</tbody>
</table>

Need Help? Contact Aurora Finance Customer Service at 204.480.1001 or email us at epic@umanitoba.ca
c. Select **Replace Document**. The following screen is displayed:

![Replace Document Screen](image)

- **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:
  - **Upload**:
  - **Browse** to replace document by the uploaded file. File:
  - **Replace original document with a document from a project**

- **Replace** button.
- **Cancel** button.

---

d. Remember you need to have an electronic copy of the documents available.

e. Leave the radio button to the default selection of **Upload**.

f. Select **Browse** and locate the desired file on your computer.

- **Select** the desired file.
- **Select** the **Replace** button.

h. The following message will display. Change the radio button to **Replace document by uploaded file** and select **OK**.

![Replace Document Message](image)

- **OK** button.
- **Cancel** button.

---
i. By default the title will display as the file name you had saved the document as. You can change the document name here if desired. Click **Save** to proceed.

j. Your new document has now replaced the instructional document in EPIC on the third task as well as on the **Documents** tab.

k. To complete this task, click on the task name. A drop down box will display.

l. Select **Mark Complete** and move to Task 4.
Task 4 - Attach Additional Relevant Documents

This task provides the option to add more documentation to your request which may be required.

If you need to add more documents beyond the Description of Services and HR Approval added on Task 2 and 3 you can attach these on the Documents tab.

**Note:** Many service agreements will not require additional documents. If you have no additional documents to add, you can simply mark the task as complete as demonstrated above. Some examples of additional documents include quotes, emails/communications with suppliers or Purchasing Services, letters of agreement etc.

If you wish to add additional documents follow these steps:

a. From the **Documents tab**, select the **Actions** button. A drop down menu is displayed.

   ![Select Actions Button](image1.png)

   Under the heading **Upload**, select **Document**.

b. The following page will display:

   ![Browse for Files](image2.png)

   You can **browse** for files on your computer to add to your request.

   The **Description** will be displayed as the title of your document.

c. Review the document you have uploaded. You can edit the description information or delete the document by selecting the **Actions** button at this stage if required.

d. Once you have selected your document, click **Done** to add it to your request.

e. Return to the **Task tab** and select the title of Task 4 to **Mark Complete**.

---

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The only required step on this page is to click Submit. This is located near the bottom of the page and will send your request to Purchasing Services.

This approval will appear on all contract requests and is the final task that you need to complete to send the request to Purchasing Services.

✓ If other approvals are added they must be completed before you can submit your request. Please note that it is not recommended that you add any additional approvals to your contract request.

If you hover over the name of any task, the instructions for how to complete the task are displayed. These are also visible when you view the task in the next step.

a. Click the task title to view a dropdown menu.
b. Select View Task Details.
c. The following page will be displayed:

d. If you have any additional information you would like to provide Purchasing Services on the request, type the details in the Message box or add an Attachment.
e. Scroll down to the bottom of the page to find the Submit icon.
f. Click Submit, you are returned to the Tasks tab.
**Note:** The task status has changed to **In Approval**.

Kris Acme Labs Agreement

**Contract Request (Procurement)**

<table>
<thead>
<tr>
<th>Overview</th>
<th>Documents</th>
<th>Tasks</th>
<th>Team</th>
<th>Message Board</th>
</tr>
</thead>
</table>

Show:  

<table>
<thead>
<tr>
<th>Name</th>
<th>Document</th>
<th>Owner</th>
<th>Status</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Add Signing Authority to Teams Tab *</td>
<td></td>
<td>Kristine Ward</td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>✓ Attach Description of Services in Documents Tab *</td>
<td>Description of Services Attachment</td>
<td>Kristine Ward</td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>✓ Attach HR Approval in Documents Tab *</td>
<td>HR Approval Attachment</td>
<td>Kristine Ward</td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>✓ Attach Additional Relevant Documents *</td>
<td></td>
<td>Kristine Ward</td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>Submit Request *</td>
<td>Kris Acme Labs Agreement</td>
<td>Kristine Ward</td>
<td>In Approval</td>
<td></td>
</tr>
</tbody>
</table>

* Indicates required task

- You can view the status of your approvals by accessing your contract request and reviewing the **status** of the approval on the **Tasks** tab. An approved request will have the status of **Approved**.

**Congratulations you have successfully created a NEW Contract Request!**

✓ Purchasing Services will review and may contact you if they require additional information before setting up the contract.