Microsoft 365 Software License Purchase Process with Merlin

Ordering your Microsoft 365 software licenses and getting them installed on your University laptop or desktop has an updated process. A new catalog and restructured approval process in EPIC simplifies the ordering process and ensures IST is notified so the installation of your license can occur.

Access to EPIC is required, if you do not have this access talk to your Faculty or Unit business manager.

Logging In
To access EPIC log into the JUMP portal with your UMnetID and password. When JUMP opens navigate to the Finance Tab to continue. On the Finance tab select the EPIC System link to log in

Creating a Requisition to Purchase a Licence
The steps to order licenses from Merlin are the same as those required for other orders in EPIC.

Step 1: Search for your item or specific Supplier catalog in EPIC
Step 2: Select items and add items to Cart to start a requisition
Step 3: Review and Edit details
- Add a Title and a Need by Date to your requisition
- Review Ship to and Accounting (FOP) details
- Add comments or attachments
Step 4: Submit the requisition to the Approval process

Step 1

From the Common Actions menu on the left side of the screen or the Create menu on the upper right side, select Requisition to begin.

The Catalog home screen will display

Step 2

Type Merlin in the search bar at the top of the screen and hit the search icon or the enter key on your keyboard. The items available from Merlin will be displayed.

Select the items you require, adjust the quantity as needed and select Add to Cart.
Step 3
Your purchase requisition will be started.
Once you have selected all the desired items, click Proceed to Checkout.

The requisition page will display. You will need to add details before you can submit your request. This includes:

- Add a Title and a Need by Date to your requisition
- Review Ship to and Accounting (FOP) details
- Add comments or attachments

For Merlin orders please add the department, the license type, and who the license is for in the title.

In the comments box include further details on the clients receiving the licenses and the machines these will be installed on. This should include the User ID; the machine number the license will be installed on and the user’s email as shown in this example.

Step 4
Once you have reviewed and confirmed the information on your request, select Submit at the top of the page.

Your request will go through the normal approval flow to obtain financial approval. You will be listed as a second approver to remind you to send the order to Merlin, at licensing@merlin.mb.ca, once fully approved.

A new Watcher will be added to all Merlin orders. This Watcher sends a notification to the IST Help & Solution Centre which will open a service ticket.

The individuals receiving the licenses will be contacted by IST to arrange installation.

Need Assistance?
For support on functions in EPIC, please contact the Aurora Finance Customer Service Desk
If you have questions regarding your license or the installation, please contact the IST Help & Solution Centre