



EPIC

BEYOND THE BASICS

Topics of Discussion

- Overview of routing
- Finding the status of a document
- The different meanings of document statuses (in process, pending amendment, etc.)
- How to close a PO
- How to set up delegates and secondary delegates
- Commonly overlooked fields
- Description
- Org Doc Number
- IU Department Contact
- Reference 1, 2, and 3
- Notes
- Object Codes: what they are, why they are important, how to use them
- How to place furniture orders
- How to deal with large furniture orders
- The company I'm ordering from requires a deposit or payment with order, how do I handle these (how to handle check enclosed/wire transfers).
- How to handle conference/hospitality payments
- How to handle advertising insertion orders and contracts
- What do I do when a vendor is not in the vendor list?

Overview of routing

- Understanding how a requisition/document routes through EPIC.
 - APO (Automatic Purchase Order)
 - In most cases anything under \$1000.00
 - Route directly to vendor.
 - Requisitions that fall under APO must be restricted in order to route to purchasing for special handling.

Dept

- Requisition is Initiated (supporting documents with requisition number on it should be sent to purchasing)
- Fiscal Officer Approves Requisition

Purch

- Purchasing processes/sends to vendor or:
- Sends PO and documentation to A/P for payment of check enclosed (pre-payment)

A/P

- Accounts Payable Receives/Processes
- Fiscal Officer Approves Payment

Finding the Status of a Document

- In process
- Awaiting Fiscal Officer
- Awaiting Org Review
- Awaiting C&G Approval
- Pending Amendment
- Awaiting Contract Manager Assignment
- Waiting for Dept/Waiting for Vendor

How to Close a PO

- A purchase order can be closed by a department if there has been action taken on the PO: ie partial payment has been made.

A PO that is closed can be amended/reopened.

- A purchase order that has not had any action taken on it must be closed by purchasing. This action will void the PO and it can not be reopened.

How to set up delegates and secondary delegates

- Please contact Rozzie Gerstman
(812) 855-1123
 - The importance of delegates is the approval process of the documents and the speed at which this can be done.

Commonly Overlooked Fields

- **Description**

EPIC - Create a Requisition - Windows Internet Explorer
https://uisapp2.iu.edu/pur-prd/requisition.do?trnStandardIntr-param

Doc Id:	Not Assigned	Req Number:	Not Assigned
Doc Status:		Req Status:	In Process
Created:	11/17/09	Initiator:	Endris, Erin Nichole

Create a Requisition
Required fields are denoted by an asterisk. When you are finished, click the continue button at the bottom of this window.

*Delivery Campus: ?
*Funding: ?
*Requestor Name: ?
*Requestor Phone: ? (use format ###-###-####)
*Requestor Email: ?
Description: ?

- **Org Doc Number**

EPIC - Create a Requisition - Windows Internet Explorer
https://uisapp2.iu.edu/pur-prd/requisition.do

Doc Id:	Not Assigned	Req Number:	Not Assigned
Doc Status:		Req Status:	In Process
Created:	11/17/09	Initiator:	Endris, Erin Nichole

Create a Requisition
Required fields are denoted by an asterisk. Use the link to the right of the red arrow in a section header to open or close the section. When you are finished, click one of the buttons at the bottom of this window to take the corresponding action on the document.

expand all collapse all

▼ hide

Doc Info

Description: ?
Org Doc Number: ?
Fiscal Year: ?

Vendor
Items
Payment Info
Delivery
Additional
Internal Notes

• IU Department Contact

EPIC - Create a Requisition - Windows Internet Explorer
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Create a Requisition

Required fields are denoted by an asterisk. Use the link to the right of the red arrow in a section header to open or close the section. When you are finished, click one of the buttons at the bottom of this window to take the corresponding action on the document.

expand all collapse all

Doc Info show
Vendor show
Items show
Payment Info show
Delivery show
Additional hide

Additional	
*Organization: UA - PUR	*Requestor Name: Erin Endris
*Method of PO Transmission: Fax	*Requestor Phone: 812-855-3198
*Cost Source: Estimate	*Requestor Email: enendris@indiana.edu
IU Dept Contact:	Reference 1:
IU Dept Contact Phone:	Reference 2:
IU Dept Contact Email:	Reference 3:
PO Total Cannot Exceed:	

Internal Notes show

review... save cancel exit

Done
Internet 100%
Start 6 Internet Explo... 5 Microsoft Office... Microsoft PowerPoi... Document1 - Micro... Document2 - Micro... 2:59 PM

• Reference 1,2, and 3

EPIC - Create a Requisition - Windows Internet Explorer
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Object Codes: what are they, why they are important, how to use them.

- **DEFINITIONS: Object Codes** are the university Chart of Account codes for income, expenses and balance sheet items. **Indirect Cost Recovery** is an analysis performed identifying expenditures made by the university in support of sponsored programs. The study results in reimbursement rates for use by agencies supporting contracts and grants at the university.
- **PROCEDURE REFERENCE:** Utilization of these codes must be made on all financial transactions, i.e. requisitions and disbursement vouchers. Copies of the object codes are available through the Financial Management Support department.
- **RESPONSIBLE ORGANIZATION:** Financial Management Support

Object Codes

Where to Find Them

- There are actually more than 9,000 different object codes.

You can run a search in the IUIE and narrow the parameters to find exactly what you're looking for.

Here is how to get to the report:

Log into the IUIE <https://www.indiana.edu/~iui/prod/luieWelcome.html>

Go to the Master Catalog

In the list of folders, drill down to Financial>Chart of Accounts>Datagroups>Object Codes

You can narrow your search results by choosing from the Valid Values. In particular, you might find it helpful to sort by Chart and then again by limiting the results to either Income or Expense object codes.

In the "Select Columns to Include" section, mark "All Columns"

Click "Run" at the bottom of the page.

Furniture Orders

- **Furniture Purchases**
- **Request Design Services:**
- Complete the [Request for Design Service](#).
- Once the form is submitted, it is automatically forwarded to [Karin Coopersmith](#), Assistant Director of Procurement and [Christine Gordy](#), UAO Interiors.
- Karin and Christine determine the appropriate vendor based on existing building, department standards or specific needs (within a day or two).
- The request for design service is forwarded to the appropriate vendor.
- The vendor contacts the departmental contact within two days to set up a mutually agreeable meeting time.
- **Meeting and Specifying:**
- The vendor interviews the parties in need of furniture and takes the needed field measurements.
- The vendor sends a brief description of the the project scope to Christine Gordy.
- Christine reviews the scope for appropriateness based on projected budget, etc (within 24 hours).
- The vendor prepares a preliminary drawing.
- The drawing is sent to Christine Gordy for review — does the drawing meet OSHA, fire, electrical and ADA codes?
- If approved, the vendor then reviews the drawing with the departmental contact.
- If the drawing meets your approval, the vendor prepares a quotation.
- If the drawing needs adjustments the vendor will make up to two adjusted drawings at no charge to your department.

- **Placing the Order:**
- Once the drawings have been approved by the department requesting the design services and the final quotations have been received, the department will need to prepare a requisition.
- Please forward the final quotation to purchasing.
- The department contact , Christine and the vendor will receive a final checklist for this project.
- Be sure to initial and return the checklist as soon as possible as purchasing will NOT complete the purchase order without this document in hand.
- **Completing Your Order:**
- The vendor will contact the department to determine delivery date(s).
- The department is responsible for having the existing furniture and contents moved prior to delivery of new furniture.
- Upon installation, the department is responsible for checking all product for any damage or defects.
- If any damage or defects are noticed by the department indicate the damage on the delivery document and sign for the project.
- These punch list items should be rectified in a reasonable time — 2-4 weeks unless a custom item has to be remanufactured.
- Upon completion of the project the department should sign off on the project for payment.
- [top↑](#)
- **Items to Keep in Mind:**
- Do not be afraid to ask the vendor questions about the drawings since they represent the product that will be received.
- The vendor will provide approximate delivery dates for the furniture — these are based on the date the order is in their hands—remember all steps must be followed before the order is sent to the vendor.
- Do not be afraid to ask purchasing questions about the process — we are here to assist in any way possible.
- Remember that once the order has been placed, furniture is **NOT** returnable. It is imperative that these steps are followed to assure accuracy and prompt service.
- **Contacts:**
- [Karin Coopersmith](#), Assistant Director of Purchasing, (812) 855-5813
- [Erin Endris](#), Institutional Purchasing Representative, (812) 855-3198
- For Request for Design Services, please fill out our on-line form [Request for Furniture Design Services](#).
- For Request for Markerboards/Corkboards, please fill out our on-line form [Request for Markerboard/Corkboard Products](#)
- For assistance with your total remodel needs, please contact [Christine Gordy](#) at UAO, (812) 856-5898

The site for requesting design services:

<http://www.indiana.edu/~blpur/forms/design.shtml>

Hospitality

- Contact venue, receive contract, obtain a hospitality code, create requisition, send contract with requisition number attached to purchasing for review, signature, and payment if necessary.
 - Hospitality (Rozzie Gerstman (812) 855-1123)
 - Request site:
 - https://apps4.indiana.edu/VPGA_Hospitality_V2/hospitality
 - Policies/Procedures Site:
 - <http://www.indiana.edu/~vpcfo/policies/accounting/i-50.html>

Signatory Authority:

<http://www.indiana.edu/~vpcfo/policies/treasurer/vi-100.html>

Advertising

- Follow these steps:
- Before a requisition is processed contact the advertiser to determine pricing. The advertiser will provide a rate card (pricing), a terms document (examples of terms are how the advertising copy must be submitted, the deadlines, proofing requirements), an insertion order (a form that describes how the advertisement needs to be submitted) and possibly a quote.
- Next prepare the advertising copy (the terms will describe how the copy must be prepared).
- Prepare and route the requisition.
- Forward the rate card, the terms, insertion order, quote (if submitted by advertiser) and the advertising copy (if ready for submission) to the Purchasing Department, Attn: [Karin Coopersmith](#). If the advertising copy is not ready at this time it can be forwarded to purchasing at a later date.
- A purchase order will be processed after the requisition has been fully approved and the items listed in #4 above are received. The Purchasing Department will sign the insertion order and forward all materials to the advertiser.

When the Vendor is Not Listed

- Search for vendor: if vendor is not listed then add it manually to the requisition.
- Type the vendor's information in as completely as possible.
- Send VIP (Vendor Information Packet) to the vendor to be completed or request purchasing send packet to the vendor.

The screenshot displays the 'EPIC - Create a Requisition' web application in a Windows Internet Explorer browser. The URL is <https://usapp2.iu.edu/pur-prd/requisition.do>. The main content area is titled 'Vendor' and contains a 'Vendor Info' form. The form is divided into two columns of input fields. The left column includes: Suggested Vendor (text input), Address 1 (text input), Address 2 (text input), City (text input), State (dropdown menu), Postal Code (text input), and Vendor Contacts (text area). The right column includes: Supplier Diversity (dropdown), Phone Number (text input), Fax Number (text input), Country (dropdown), Contract ID (text input), and Customer Number (text input). Below these fields is a 'Notes to Vendor' text area. At the top right of the form, there are two buttons: 'search for vendor' and 'available contracts'. Below the main form is a section titled 'Additional Suggested Vendor Names' with five text input fields labeled 'Vendor Name 1' through 'Vendor Name 5'. At the bottom of the form, there are several expandable sections: 'Items', 'Payment Info', 'Delivery', 'Additional', and 'Internal Notes', each with a 'show' button. The browser's taskbar at the bottom shows the Start button, several open applications (including Microsoft Office and Internet Explorer), and the system clock displaying 10:09 AM.

Resources/Documents

OneStart - Windows Internet Explorer
 https://onestart.iu.edu/my2-prd/portal/124

INDIANA UNIVERSITY
 OneStart
 Campus Services Notifications (1) My Groups My Zone

Services > Administrative Systems > EPIC

EPIC Tasks Documentation System Info Additional Vendors Department Resources Purchasing Resources

EPIC
 Electronic Procurement and Invoicing Center

- Shop Contracts (preferred vendor)
- Create a Requisition
- Create a Vendor
- Search for Documents
- Search for Vendors
- Assign a Purchasing Contract Manager
- Manage Quote Lists
- Manage Vendor
- Stipulations
- Create a Receiving Ticket
- Search for a Receiving Ticket

User Id is ENENRDS
 User Name is Endris, Erin Nichole
 User Organization is UA-PUR
 User Campus is BL

Quotes Due Today

PO #	PO Description
518629	Request for Quote of Multifunction Sorter Cabinet for Kinesiology
526975	Special Quote- SPEA Radio Marketing
549729	Special Quote
547376	Special Quote
549462	SPECIAL QUOTE
552567	Special Quote-Coat Racks
554876	Special Quote: computer moving needs estimates (UITS)
555961	Special Quote-Poptars Interior Plants
556883	Blanket for Carpet Installation
560502	Special Quote - 4 Drawer Locking File

OneStart - Windows Internet Explorer
 https://onestart.iu.edu/my2-prd/portal/124/_pm0x3my2-prd0x2xMLP1132181_view/_ws0x3my2-prd0x2xMLP1132181

EPIC

- Data Privacy and Security Addendum
- Non Disclosure Agreement

Data Security

- Data Security Agreement Guidelines for Access and Use
- Data Security Workbook (XLSX)

Forms

- Conflict of Interest Certification
- State Sales Tax Exemption
- FMS Tax Payment Information for International Visitors
- FMS Tax Quick Guide to International Visitor Payment Procedures
- Foreign Vendor Information Packet
- General Sales Tax Exemption Certificate
- International Wire Transfer
- Procurement Card Exception to Policy
- US Vendor Information Packet
- Breeze Video Conferencing
- Business Diversity
- Collection Agencies
- DHL Account Setup
- Hospitality
- IT Consultants
- IU Conference Call Services
- IUWare online
- Licensing and Trademarks
- Physical Plant Service Request Form
- Printing Services
- Professional Services
- Relocation - Moving Request for Contractors Form (Affiliation form no longer required)
- Request for Furniture Design
- Request for Markerboard / Corkboard
- Request for Printing Services (Office of Communications and Marketing)
- Stat/Math Center Software
- Surplus Stores
- Telephone Services
- Temporary Services
- Travel Management

