



EPIC

Electronic Procurement and Invoicing Center

Want to get ahead of the game by entering orders for the 2008 FY now? — Use the newly added field on the Doc Info Panel of the requisition.

Preparing for Fiscal Year 2008

In EPIC, we have the ability for departments to set up Requisitions for next fiscal year 2007-2008. It is expected that many departments will want to use the weeks prior to the new fiscal year to set up recurring payment Purchase Orders (formerly called "blankets"). Following is information on this process.

On April 1, 2007, a field for next fiscal year, 2008, was added to the Doc Info Panel on the Requisition. If this is selected, the Requisition will come to Purchasing and be held in Purchasing until a few days before June 30, 2007, when it will be released to the vendors. There may be some exceptions to this, such as services contracts that afford discounts for 30-60 day renewal prior to end dates.

ENTERING YOUR REQUISITIONS:

You may run a report in the IUIE to list all your current Recurring Payment Requisitions. The instructions to do this are listed at the end of this message.

To enter Requisitions for next fiscal year:

1. Select the 2008 Fiscal Year in the Doc Info Panel.
2. Use the recurring payment fields in the Payment Info Panel.
 - a. Select the appropriate type of

recurring payment: Fixed Schedule/Fixed Amount, Fixed Schedule/Variable Amount, or Variable Schedule/Variable Amount.

- b. Enter a begin and end date. The end date should be the end of the contract. This could encompass multiple years. For example, the contract could end on June 30, 2010, so the end date would be 06/30/10. (This will allow the same PO to live over multiple fiscal years.)
3. Enter appropriate line items, amounts, and accounting information for fiscal year 2007-2008. Even though you may enter a multi-year contract in the recurring payments fields, the amounts should be for one fiscal year only, to align with our budget process.
4. Ensure that the quantity field for the line item reflects how you want the Purchase Order to be paid.
 - a. The quantity may be entered if there are specific unit cost increments for each payment, such as 12 months at \$100 per month.
 - b. The quantity should be left BLANK if the payments will be variable. A BLANK quan-

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Preparing for Fiscal Year 2008 (cont...)

tity creates a "buy-down" process for payments on the PO.

For those Requisitions that are not recurring payment, it is suggested that you wait until near the end of June to complete these for next fiscal year, as they also will be held by Purchasing until a few days before June 30, 2007.

NOTES:

1. If goods or services are delivered in Fiscal Year 2007, they must be paid in Fiscal Year 2007, so even with the late release of Purchase Orders to vendors, it is possible that the good/service could be delivered in 2007. If that is the case, the payment will be booked in 2007 and the encumbrance for 2008 must be released.
2. The feature to create a Requisition for next fiscal year will not be available for Shop Catalogs Requisitions because those products are usually delivered so quickly.
3. The "Copy to New" button on a Requisition can be used to facilitate entry of new Requisitions.
4. For most recurring payment orders, a contract or a pricing agreement should be in place.

HOW TO RUN A REPORT OF CURRENT RECURRING PAYMENT ORDERS IN THE IUIE:

1. Login to the IUIE and select the

Master Catalog tab.

2. Go to the folder: Financial / EPIC Departmental Resources / Purchase Order.
3. Select the Purchase Order Summary report object (not the "PO Summary" report object).
4. On the top half of the screen, enter the parameters for the report. It is suggested you enter these parameters, at minimum:
 - a. Enter your Chart (requisition processed by)
 - b. Enter your Org Code (requisition processed by)
 - c. Enter 06/30/2007 in the recurring payment end date. (You may also use a different date, or place a less-than-or-equal sign in front of the date. Example: entering <=06/30/2007 will give you all your recurring payment POs that have an end date on or before 6/30/2007.)
5. Then, choose the columns you would like to see on your report. You may select ALL of them, or choose individual columns.
6. At the bottom left of the panel, choose the format: either HTML or Excel.
7. At the bottom right of the panel, change the parameter of records to return to "No Limit."
8. Run the report. ■

**Get a list of
Recurring Payment
Orders from the
IUIE.**

Learn how here





Using the new links ensures that the correct url will be used to connect to the vendor.

EPIC Channel Enhancement

Several changes have been made to some of the EPIC Onestart channels.

- The Support channel was moved to below the EPIC Tasks, giving a better view of all of the support documents.
- A new narrow channel below Announcements is visible to faculty and staff at some campus locations, this channel is titled "Additional Vendors". Contents in this channel represent vendors with whom the university has developed preferred pricing, however the order method will require a p-card. In some cases, vendors will be available in B2B (using the shop contracts link) as well as, in the Additional Vendors channel. This supports your preferred

purchasing method. Using these links ensures that the correct url will be used to connect to the vendor.

- Another new narrow channel on the right is visible at some campus locations, this channel is titled "Resources". These links have been compiled to assist those who make departmental purchasing decisions. For example, before you purchase software visit IUWare online to verify that the software is not offered as a site license. These are campus specific resources and can be added as needed. If you would like a resource added to the listing, as you frequently visit a site, please ask and the request will be evaluated! ■

If You Encounter Problems Shopping in EPIC

There are a couple of problems that can occur if a workstation's browser settings need to be evaluated:

- you are attempting to access a vendor's website through the Shop Contracts link in EPIC and you are prompted to provide log in information
- you finished shopping and the checkout process is asking for a credit card number or shipping information.

Try

- clearing the history and cookies (found in the privacy tab in Firefox or the general tab in Internet Explorer in the Tools/Options pull down)
- verifying that cookies have been enabled (found in the privacy tab in Firefox and Internet Explorer in the Tools/Options pull down).

If these tips do not resolve the issues, please contact your Purchasing Department. ■



Using the right-click on the computer mouse will display a “back” option.

◦ The 2007 Catalog, the Concerto Shop Contracts search field, and customer service are the best options for locating current and available products.

Concerto and Barnes & Noble Shop Contracts “Back Key”

The EPIC Shop Contracts sites for Concerto and Barnes and Noble do not have a “back key” in order to navigate back to the previous screen(s). Several people have expressed their frustration over this issue, but were happy to learn that there is a “trick” to solve this dilemma. Using the right-click on the computer mouse will display a “back” option which, when selected, will allow for navigation back to previous screens. This “trick” will work with most web sites. ■

Concerto Restricted Items

Many Concerto Office Supply items which were previously available through EPIC Shop Contracts now appear as “restricted”. This occurs when items have been discontinued. Many of the product codes from the 2006 Catalog are currently discontinued and listed as “restricted”. In order to find available items it is important to use product codes from the new 2007 Catalog, or to perform a search by description on the Shop Contracts site. Concerto Customer Service at 800-564-8008 can also suggest an alternate for a restricted/discontinued product.

To obtain a copy of the new 2007 Concerto Catalog please include the item number J9-CONCERTO07 as part of an EPIC Shop Contracts order with additional products, and the new catalog will arrive with that order. A requisition for a catalog alone cannot be processed.

The 2007 Catalog, the Concerto Shop Contracts search field, and customer service are the best options for locating current and available products. Utilizing older product codes in many cases will yield a “discontinued” result. ■

Get Green with Paper!

Initiatives are under way for Indiana University to become more environmentally friendly. Paper is one of the most utilized office supply products across all campuses, and this is one area where a large impact can be made. Recycling used paper is one way that we can all become greener, but please remember that buying recycled paper is the other end of the spectrum in the recycled cycle.

The 2007 Concerto spend for recycled paper is 75% less than regular processed paper, to date. Recycled paper is available through the EPIC Concerto Shop Contracts site. In most cases, product codes for the best priced paper can be found in the Message Board area. Customer service at 800-564-8008 can assist to find product codes and share pricing as well. Recycled paper is more expensive, but that is because the University does not buy enough of it to drive down costs under the Concerto contract. That can change if everyone works together. Please help to raise our recycled paper spending and to contribute to the environmental friendliness of the University.

Please review campus statistics at <http://www.indiana.edu/~purchase/green/spotlight.html>. ■



IUB EPIC Help Desk Retiring on May 4.

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EPIC Help Desk on the IUB Campus

There has been a significant reduction in the number of calls to the EPIC Help Desk (5-3742) on the Bloomington campus. The decision has been made to “retire” the Help Desk on May 4, 2007 and return to contacting the appropriate buying areas for assistance. Please use the following link to the Purchasing web site if you are unsure whom to contact: http://www.indiana.edu/~purchase/comm/who_what.html. This page contains contact information for the most frequently used commodities. Phone numbers 5-EPIC and 6-EPIC will no longer be active. You may call the IUB Purchasing general information number at 5-3720 or your campus Purchasing Department for assistance. ■

How to Look-up the Status of a Payment

There are two methods to check on the status of a payment.

The first method is the PO/Invoice Inquiry. For this search you must know the Purchase Order number and/or the vendor’s invoice number.

The second method is the Disbursement Number Inquiry. This is used when you have received a University accounts payable check and need to retrieve more information concerning the invoices for which the check is paying.

Go to <https://fdrs.fms.indiana.edu/cgi-bin/AP/AP> and click on the method you would like to use. Enter the necessary information and click on submit query. If the invoice has been paid the results will appear in the Accounts Payable Search Results box with information about the payment.

This link can also be shared with vendors that would like to know the status of their payments. ■

Subscribe to the EPIC Listserv

To receive updated information and announcements about EPIC, you can subscribe to the listserv by:

- Sending an e-mail to : listserv@indiana.edu
- Place “subscribe EPIC-L” in the body of the message (no subject).