Basic Science Administration – REQUESTOR Procedure

1. Visit the NUPortal to access NUFinancials

https://www.it.northwestern.edu/nuportal/?utm_source=www.nm.org&utm_medium=empl oyee-menu-link&utm_campaign=nm-main-site

NUPortal

Your point of entry for Northwestern's Administrative Systems.

System Logins	Financial	Facilities	Research Administration	Students	Human Resources
CAESAR			= myH	R 🛍	
= CERES			- NUF	inancials 🔒	
 Cognos 🔒 			= NUP	lans Contributor	•
Canvas a			= NUP	lans Web 🔒	
Facilities Compared and Comp	onnect 🔒		= Wild	card Photo Subn	nission
= iBuyNU			= WFS	Timekeeping 🔒	

2. Locate the "eProcurement" tab or type it in the search bar.

Northwestern FINANCIALS 🕐 🗢	Menu 🗸	Search in Menu	Q
My Homepage ~			
	Approvals	Supplier Admin	Expenses
	16		\$163.50 Unapplied Charges
	My Forms	Payment Request	NUFinancials WorkCenter
	Budgets Overview	Add/Update Receipts	eProcurement

3. Click "Create Requisition" tab

My Requisitions	Create Requisition	Create Receipt	My Receipts

4. Click on "Web Suppliers"

Create Requisition				
			Catalog	▼ Search
Catalog	Catalog			
🙀 Item History			Note	Search Engine for eProcure
♡ Favorites				
Templates				
🕀 Web Suppliers				
🛆 Special Requests				
5. Click on "IBuyN	U"			
Web Suppliers				
			(Dental)	

6. Shop for the products you need through the vendors on the right-hand side under showcases.

Requisition									
iBuj N∐					All 🔻	Search (Alt+Q)	۹	0.00 USD 🗎	\$
Shop · New 1									
Shop									
Simple Advanced					Go to: Favorites	Forms Quick Order	Browse	Suppliers Cate	egories
Search for products, suppliers, forms, part number, etc.									
Organization Massage			Showcaraa						
Welcome to Northwestern's online marketolace that provide	des departments and schools w	th a streamlined cost-effective way to order from NU Preferred Vendors	Showcases						
If you are new to using iBuyNU, we encourage you to review eProcurement platform. We also encourage you to review transactions, shop from supplier catalogs through to how	w the <i>iBuyNU</i> Webinar that will p r the iBuyNU Knowledge Base D to create an order.	ovide a high-level demonstration of some of the features and benefits of the new cuments that will provide step by step guidance for how to search for your	Lab Supplies - Hosted						
When reviewing the available supplier catalogs, you will se behind. To review the list of suppliers who are soon comin	e that your favorite suppliers an 1g and to learn more about iBuyi	listed and ready for you to shop. There are a few that are missing but aren't fare $U_{\rm J}$ please visit the iBUyNU Marketplace.	LONZO Laboratory Suppliers						
 IDT Contract Pricing - With the IDT catalog being m make our first purchase. So when shopping for the 	noved from Aquiire to Jaggaer, o first time in the new IDT catalog	ur accounts have to be reestablished. Our accounts will be reestablished after we you will see non-contract pricing but we will be invoiced with contract pricing.	Lab Supplies - Punchout						
 Guy Brown is now available - is the new office supp available. We hope to have this process completed C2 Imaging is now available. They are the new Bus 	lies vendor who replaced Offie [by noon today. iness Card and Letterhead supp	epot. We are in the process of validating pricing to ensure our contract pricing is lier who replaced Active.	Elaborative Lab Supplies - Full Catalog	Evanston Storeroom	Chi	Planar Scientific		Simpson Querre	ey Storen
Quick Links	O	My Resources	at sout						
View Favorites		My Resources Product Release Library C consultant@northwestern.edu Phone: +1 847-491-4357	Laboratory Supplies	Laboratory Supplies	Lab	coratory Supplies		Laboratory	Supplies
		Site Map	Laboratory Supplies	Laboratory Supplies	Lab	BioLabs		Prome Laboratory S	nga Supplies
			11111	MILLIPORE		Minay Science		RAIN	IN

7. Once you have added all items to your cart, please continue the cart to return to IBuyNU.

Create Requisition								
PunchOut						Your JAGGAER Session	n will expire in: 58:31 Reset Ses	sion
≡ €fis	her scientific	Search		Q	Order State	us Quick Order Suppo	Fisher Pun V	3)
	Shopping	Cart						
	Account: 601330001					Print 🖲	Share 🏕	
	Item		Price	Quantity	Subtotal	Return Cart Purchasing Appli	to cation	
	Fisherb Beakers Catalog I Capacity	rand™ Reusable Glass Low-Form Griffin s Number: FB10050 (Metric): 50 mL	 \$33.38 / Pack of \$133.52 / Case of 4 PK 	2	\$66.76	Order Summary	\$87.95	
			 In Stock 2 available for delive Ships from CHICAG 	ry by Aug 20 RO, IL (MWD)		+ Add Promotion Code Order Total	\$87.95	
			0	Northwestern Low Cost A	Iternative	Cancel Punch	out	
				Remove Save	for Later			
	Fisherb Catalog	rand™ Disposable Face Mask Number: 12888001C	\$21.19 / Case of 500	1	\$21.19			
			In Stock Available for delivery Ships from CHICAG	/ by Aug 20 O, IL (MWD)				
				Remove Save	for Later			

8. Click "Final Cart Review" towards the top right.

Create	Requisition										:	
â	i <i>Buy</i> NU					All 👻	Search (Alt+Q)	Q	54.57 USD 📜	♥ ■	447	
	Shopping Cart • 191031715							e	Assign Cart	Final Cart Rev	ew	
6	Simple Advanced							Summary			\rightarrow	
Q	Search for products, suppliers, forms, part number, etc.								Details ~			
血	2 Items Select All 💌								Mon Carreon			
	Fisher Scientific · 2 Items · 54.57 USD								Name			
	SUPPLIER DETAILS							2024-08-28 MAC7499 01				
	Need to make changes? MODIFY ITEMS VIEW ITEMS Item • FB50050GRIFFIN 50ML 12/PK • FACEMASK 3 PLY FAPI OOP	(s) was retrieved or	: 8/28/2024 8:58:2	3 AM				Total (54.57 USD) ~			~	
	Item	Catalog No.	Size/ Packaging	Unit Price	Quantity	Ext. Price		Shipping, Ha and charged are for estir workflow ap	andling, and Tax charg d by each supplier. The nation purposes, budg oprovals.	es are calculate values shown l et checking, and	d here d	
	1 FB50050GRIFFIN 50ML 12/PK	FB10050	РК	33.38	Qty: 1 PK	33.38	🗆	Total:		5	4.57	
٩												

9. Click "Checkout" towards the top right.

Create Requisition 447 i*Buy*NU Search (Alt+Q) 54.57 USD 📜 ♡ ► All 🔻 ? Cart • 191031715 ۲ • • • • Assign Cart Summary Comments Attachments History ſ Draft Q \sim General 💉 · · · Total (54.57 USD) \sim Ticket Number no value 血 Shipping, Handling, and Tax charges are calculated and charged by each supplier. The 2024-08-28 MAC7499 01 Cart Name values shown here are for estimation purposes, budget checking, and workflow Prepared by Mon Carreon approvals. Prepared for Mon Carreon Subtotal 54.57 54.57 2 Lines ... 🗌 🔻

10. Please change "Requisition Name" (Vendor-Date-Requestor Name) and add comments as necessary. Attachments such as quotes can be added under "Header Comments"

Create Requisition				:
Checkout				Save Submit
✓ Requisition Summary				
Business Unit NW Requisition Name (BS Requester MA Currency USI	/UNV Northwestern University SA 8/28/24 Mon C7499 Mon Carreon D I Header Comments	Priority *Requisition Type	Medium v MKT	
> Additional Fields				

11. Click the "Select All" box and "Mass Change" for carts with multiple lines. For single line cart changes, please use the schedule/details box.

SI SI	elect All Actions ⊘							2 го
	0	Line 1 External Item FB50050GRIFFIN 50ML 12/PK Item ID Supplier FISHER SCIENTIFIC CO LLC	Quantify 2.0000	Unit of Measure PK	Price 33.38	Currency USD	Total 66.76 USD	C SchedueDetais
		Line 2 External Item FACEMASK 3 PLY EARLOOP Item ID Supplier FISHER SCIENTIFIC CO LLC	Quantity 1.0000	Unit of Measure CS	Price 21.19	Currency USD	Total 21.19 USD	E ScheduleDetails

12. Enter shipping information with the "Ship To" code and "Attention" (PI/Room Number/Requestor Name) lines. Please reach out to BSA Procurement if you do not know your ship to code.

✓Line Information				
Note: The information belo data in the corresponding f	w does not reflect the data in th ields on the selected lines that	ne selected requisition lines. When the 'OK' button is are available for sourcing.	clicked, the data entered on	this page will replace the
Supplier ID		Buyer		٩
Supplier Location		Category	۹	
 Shipping Information 				
Ship To		Due Date		
		Attention	h Number/Requestor Name	
✓ Distribution Information	n			

- 13. Next, we will enter the Chart String information
 - a. Chartfield 1 please fill out "Percent" and "Account" code lines. Please see below for list of account code. Please note that if you have multiple chart strings, you will need to change the distribution lines under "*Apply Distribution Changes" and change it to "Replace Distribution Lines". Change the "Percent" depending on the number of chart strings and it must equal 100%. Please refer to the below account codes.

ACCOUNT CODES	ACCOUNT NAME	DESCRIPTION OF USE
73300	Chemicals	Any substance that has a defined composition, contains liquid, powder or gases substances. Ex Reagents, Antibodies, Oligos.
75450	Equipment Service/Contracts	Cover the repair and maintenance of the Capital Equipment purchases
75225	External- Computing Services	Cloud services, Web page services
73475	Lab Supplies and Hardware	Tools and instruments that are the basic tools researchers and technicians use to help them do their jobs in the lab. Examples: Labware, lab trays, lab pans, lab utensils to measure, mix, sort, handle, dispense, and analyze lab materials precisely and efficiently.
75340	Laboratory Services	Services performed at another location examples: Creating synthesis or testing lab results.
73010	Paper and Office Supplies	General Lab supplies Example: Toners; Pens; Markers, Notebooks, Paper towels, Batteries, Bleach
73500	Photography Supplies	Photo lens, photo paper
73100	Purchased Software	Any software purchased that is required for downloads.
73350	Radioactive Materials	items that is radioactive. All orders to be sent to research safety
75440	Repair Services	Technician to be sent for repairs or send items out to the vendor for calibrations

COMMONLY USED ACCOUNT CODE

Distribution Information

All Distribution Changes

~

Please enter GL Business Unit before selecting other chartfield values

									1 rov
Chartfields1	Chartfields2	Chartfields3	Details	Asset Information	Show All				
Distribution Line	ţŤ	Percent 11	Location †↓		GL Unit ↑↓		Account 11		
	1	100.0000		Q	NWUNV	Q	73475	Q	+ –

b. Chartfield 2 – Fill out the "Fund Code" and "Dept" lines

*Apply Distribution	Changes All Dis	tribution Lines	~					
Please enter GL Business Unit before selecting other chartfield values								
Chartfields1	Chartfields2	Chartfields3	Details	Asset Information	Show All			1 row
*Fund Code †↓			*Dept ↑↓			Program 🔃		
610	Q		5107000	Q			Q	+ -

c. Chartfield 3 – Fill out the "PC Business Unit" (NWUNV), "Project", and "Activity"(01). Please note that some chart strings have a different account code. Also, please note that some chart strings require the "Chartfield 1" to be filled out.

V Distribution Information									
*Apply Distribution Changes All Distribution Lines									
Please enter GL Business Unit before selecting other chartfield values									
Chartfields1	Chartfields2	Chartfields3	Details Asset Ir	formation Show All				1 row	
PC Business Unit 1		Project 11		Activity 1		ChartField 1 ↑↓			

14. Once all information is completed, please hit "Done" on the top right corner.

Cancel		Mass Change	Done
✓Line Information			
Note: The information below the corresponding fields on	v does not reflect the data in the the selected lines that are availa	selected requisition lines. When the 'OK' button is clic able for sourcing.	ked, the data entered on this page will replace the data in
Supplier ID		Buye	r Q
Supplier Location		Categor	y Q
✓ Shipping Information			
Ship To	CDB302HU Q	Due Dat	e
		Attentio	PI/Room Number/Requesto
✓ Distribution Information			
*Apply Distribution Changes	All Distribution Lines	values	
			1 row
Chartfields1 Chartfie	elds2 Chartfields3 Det	ails Asset Information Show All	
PC Business Unit †↓	Project 11	Activity 1	ChartField 1 🔃
NWUNV	Q 60068763	Q 01 Q	α + –

15. Next, click the "Save" button on the top right. Once saved, click the checkout button.

Create Requisition							
						Sav	Submit
Checkout							
✓ Requisition Summary						Order	Total 54.57 USD
Business Unit	NWUNV Northwestern University	,		Priority M	edium 🗸		
Requisition Name	BSA 8/28/24 Mon		*Requisi	tion Type M	KT		
Requester	MAC7499 Mon Carreon						
Currency	USD						
	☐ Header Comments						
Edit Requisition							:
							Checkout
Edit Shopping Cart for I	Requisition ID REQ2089	007					
× Requisition Summary							
	Business Unit	NWUNV					
	Requisition Name	BSA 8/28/24 Mon					
	Requester	MAC7499					
	Currency	USD					
							2 rows
Item Description 1	11	Status ↑↓	Price ↑↓	Cu	urrency ↑↓ Quantity ↑↓	Unit of Measure ^{↑↓}	
FB50050GRIFFI	N 50ML 12/PK	Open	33.38	US	SD 1.0000	РК Q	団 Delete
FACEMASK 3 PL	Y EARLOOP	Open	21.19	US	SD 1.0000	CS Q	The Delete

16. Next, click the "Check Budget" button, then hit "Yes" for the pop-up message. Click the "Checkout" button once more.

Edit Requisition						
Checkout for Requisiti	on ID REQ2089007				Save	Submit
					Order Total	54.57 USD
✓ Requisition Summary						
Business Unit	NWUNV Northwestern University		Priority	Medium ~		
Requisition Name	BSA 8/28/24 Mon		*Poquisition Type	MKT		
Requester	MAC7499 Mon Carreon		"Requisition type			
Currency	USD		Budget Check Statue			
	Header Comments		Budget Check Status		_	
			🗧 🐔 Check Budg	get 🛛 😹 Pre-Check Budget		
	Freview Approvais			-		
> Additional Fields						
Edit Requisition						:
						Chookout
					Opdate Cart	Sheckout
Edit Shopping Cart for I	Requisition ID REQ20890	007				
2 item(s) to buy now.						
✓ Requisition Summary						
	Business Unit	NWUNV				
	Requisition Name	BSA 8/28/24 Mon				
	Requester	MAC7499				
	Currency	USD				
						2 rows
Item Description 1	11	Status ↑↓	Price ↑↓	Currency ↑↓ Quantity ↑↓ U	leasure 1	

17. Once the budget is valid, you can click the "Submit" button.

Edit Requisition				
Checkout for Requisition	on ID REQ2089007			Save
				Order Total 54.57 USD
			Pre-E	ncumbrance Balance 54.57 USD
				Pre Encumbrance Details
✓ Requisition Summary				
Business Unit	NWUNV Northwestern University	Priority	Medium v	
Requisition Name	BSA 8/28/24 Mon	*Requisition Type	MKT	
Requester	MAC7499 Mon Carreon		iBuyNU Orders	
Currency	USD	Budget Check Status	Valid Budget Details	
	Header Comments			
	Preview Approvals	🔞 Check Bud	lget 🛛 😸 Pre-Check Budget	
> Additional Fields				

If you have any questions, please contact BSA-Procurement@northwestern.edu for any inquiries.