

## 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=employee-menu-link&utm\\_campaign=nm-main-site](https://www.it.northwestern.edu/nuportal/?utm_source=www.nm.org&utm_medium=employee-menu-link&utm_campaign=nm-main-site)

# NUPortal

Your point of entry for Northwestern's Administrative Systems.

The screenshot shows the 'System Logins' menu with a navigation bar at the top containing 'Financial', 'Facilities', 'Research Administration', 'Students', and 'Human Resources'. The main menu lists various systems, with 'NUFinancials' highlighted in yellow. Other systems listed include CAESAR, CERES, Cognos, Canvas, Facilities Connect, iBuyNU, myHR, NUPlans Contributor, NUPlans Web, Wildcard Photo Submission, and WFS Timekeeping.

- System Logins
  - Financial
  - Facilities
  - Research Administration
  - Students
  - Human Resources
- CAESAR
- CERES
- Cognos
- Canvas
- Facilities Connect
- iBuyNU
- myHR
- NUFinancials**
- NUPlans Contributor
- NUPlans Web
- Wildcard Photo Submission
- WFS Timekeeping

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

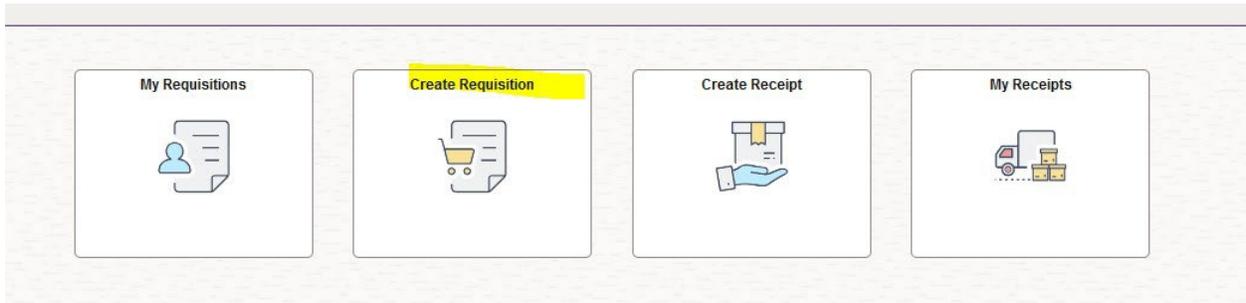
The screenshot shows the Northwestern Financials homepage. The top navigation bar includes 'Northwestern FINANCIALS' and a search bar. Below the navigation bar is a 'My Homepage' section with a grid of nine tiles. The 'eProcurement' tile is highlighted in yellow. Other tiles include Approvals (16), Supplier Admin, Expenses (\$163.50 Unapplied Charges), My Forms, Payment Request, NUFinancials WorkCenter, Budgets Overview, and Add/Update Receipts.

Northwestern FINANCIALS | Menu | Search in Menu

My Homepage

- Approvals (16)
- Supplier Admin
- Expenses (\$163.50 Unapplied Charges)
- My Forms
- Payment Request
- NUFinancials WorkCenter
- Budgets Overview
- Add/Update Receipts
- eProcurement**

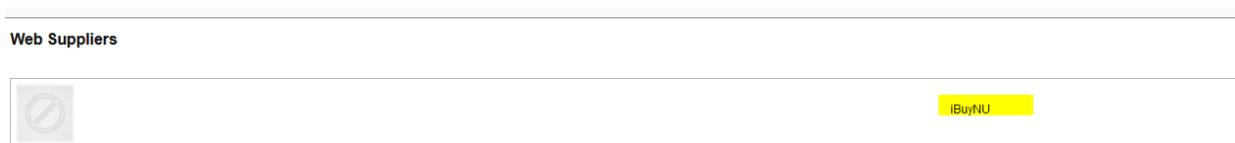
3. Click "Create Requisition" tab



4. Click on "Web Suppliers"



5. Click on "iBuyNU"



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

The screenshot shows the 'Create Requisition' page on the iBuyNU platform. At the top, there's a navigation bar with 'Shop · New 1' and a search bar. Below this, there's an 'Organization Message' section with text about the platform and 'Important Catalog Updates'. To the right, there's a 'Showcases' section displaying a grid of vendor logos including LONZA, abcam, BIO-RAD, BD, IDT, and RAININ. A 'My Resources' box is also visible in the lower-left area.

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

The screenshot shows the 'Shopping Cart' page on the Fisher Scientific website. The cart contains two items:

Item	Price	Quantity	Subtotal
Fisherbrand™ Reusable Glass Low-Form Griffin Beakers Catalog Number: FB10050 Capacity (Metric): 50 mL	\$33.38 / Pack of 12 \$133.52 / Case of 4 PK	2	\$66.76
Fisherbrand™ Disposable Face Mask Catalog Number: 12888001C	\$21.19 / Case of 500	1	\$21.19

Order Summary:

- Subtotal - 3 items: \$87.95
- Order Total: \$87.95

A green button labeled 'Return Cart to Purchasing Application' is highlighted in the top right corner of the cart area.

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

Create Requisition

iBuyNU

All Search (Alt+Q) 54.57 USD

Shopping Cart • 191031715

Assign Cart Final Cart Review

Simple Advanced

Search for products, suppliers, forms, part number, etc.

2 Items [Select All](#)

**Fisher Scientific • 2 Items • 54.57 USD**

SUPPLIER DETAILS

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 8/28/2024 8:58:23 AM

- FB50050GRIFFIN 50ML 12/PK
- FACEMASK 3 PLY EARLOOP

Item	Catalog No.	Size/ Packaging	Unit Price	Quantity	Ext. Price
1  FB50050GRIFFIN 50ML 12/PK	FB10050	PK	33.38	Qty: 1 PK	33.38

ITEM DETAILS

Summary

Details

For  
Mon Carreon

Name  
2024-08-28 MAC7499 01

**Total (54.57 USD)**

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Total: 54.57

9. Click "Checkout" towards the top right.

Create Requisition

iBuyNU

All Search (Alt+Q) 54.57 USD

Cart • 191031715

Assign Cart Checkout

Summary Comments Attachments History

General

Ticket Number *no value*

Cart Name 2024-08-28 MAC7499 01

Prepared by Mon Carreon

Prepared for Mon Carreon

2 Lines

Draft

**Total (54.57 USD)**

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 54.57

54.57

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** Order Total 54.57 USD

**Requisition Summary**

Business Unit NWUNV Northwestern University  
Priority Medium  
Requisition Name BSA 8/28/24 Mon  
Requester MAC7499 Mon Carreon  
Currency USD  
\*Requisition Type MKT

Header Comments

Additional Fields

Justification Comments

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.

Requisition Lines Overview

Select All Actions

Line	Item	Quantity	Unit of Measure	Price	Currency	Total	Actions
Line 1	External Item FB50050GRIFFIN 50ML 12/PK Item ID Supplier FISHER SCIENTIFIC CO LLC	2.0000	PK	33.38	USD	66.76 USD	ScheduleDetails
Line 2	External Item FACEMASK 3 PLY EARLOOP Item ID Supplier FISHER SCIENTIFIC CO LLC	1.0000	CS	21.19	USD	21.19 USD	ScheduleDetails

Mass Change

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 below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier ID  
Supplier Location  
Buyer  
Category

**Shipping Information**

Ship To CDB302HU  
Due Date  
Attention n Number/Requestor Name

**Distribution Information**

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.

**COMMONLY USED ACCOUNT CODE**

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

▼ Distribution Information

\*Apply Distribution Changes

Please enter GL Business Unit before selecting other chartfield values

1 row

Chartfields1	Chartfields2	Chartfields3	Details	Asset Information	Show All
Distribution Line ↕	Percent ↕	Location ↕	GL Unit ↕	Account ↕	
1	100.0000	<input type="text"/>	<input type="text"/>	NWUNV	73475

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

\*Apply Distribution Changes

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				5107000								+ -			

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.

▼ Distribution Information

\*Apply Distribution Changes

Please enter GL Business Unit before selecting other chartfield values

Chartfields1		Chartfields2		Chartfields3		Details		Asset Information		Show All		1 row	
PC Business Unit		Project		Activity		ChartField 1							
NWUNV		60068763		01								+ -	

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

Cancel										Mass Change										Done	
▼ Line Information																					
<p><b>Note:</b> The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.</p>																					
Supplier ID				Supplier Location				Buyer				Category									
▼ Shipping Information																					
Ship To				Due Date				Attention				PI/Room Number/Requesto									
CDB302HU																					
▼ Distribution Information																					
*Apply Distribution Changes <input type="text" value="All Distribution Lines"/>																					
Please enter GL Business Unit before selecting other chartfield values																					
Chartfields1		Chartfields2		Chartfields3		Details		Asset Information		Show All		1 row									
PC Business Unit		Project		Activity		ChartField 1															
NWUNV		60068763		01								+ -									

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

## Create Requisition

[Save](#) [Submit](#)

### Checkout

Order Total **54.57 USD**

#### Requisition Summary

Business Unit NWUNV Northwestern University

Priority **Medium** ▾

Requisition Name

\*Requisition Type

Requester MAC7499 Mon Carreon

Currency USD

## Edit Requisition

[Update Cart](#) [Checkout](#)

### Edit Shopping Cart for Requisition ID REQ2089007

2 item(s) to buy now.

#### Requisition Summary

Business Unit NWUNV

Requisition Name

Requester MAC7499

Currency USD

2 rows

Item Description ↑↓	Status ↑↓	Price ↑↓	Currency ↑↓	Quantity ↑↓	Unit of Measure ↑↓	
 FB50050GRIFFIN 50ML 12/PK	Open	33.38	USD	1.0000	PK	<input type="text" value="Q"/> <input type="button" value="Delete"/>
 FACEMASK 3 PLY EARLOOP	Open	21.19	USD	1.0000	CS	<input type="text" value="Q"/> <input type="button" value="Delete"/>

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

### Edit Requisition

[Save](#) [Submit](#)

**Checkout for Requisition ID REQ2089007** Order Total **54.57 USD**

▼ **Requisition Summary**

Business Unit	NWUNV Northwestern University	Priority	Medium ▼
Requisition Name	<input type="text" value="BSA 8/28/24 Mon"/>	*Requisition Type	<input type="text" value="MKT"/>
Requester	MAC7499 Mon Carreon		iBuyNU Orders
Currency	USD	Budget Check Status	<span style="color: red;">⚠ Not Checked</span>

Header Comments

[Preview Approvals](#)

[Check Budget](#) [Pre-Check Budget](#)

> **Additional Fields**

### Edit Requisition

[Update Cart](#) [Checkout](#)

**Edit Shopping Cart for Requisition ID REQ2089007**

2 item(s) to buy now.

▼ **Requisition Summary**

Business Unit	NWUNV
Requisition Name	<input type="text" value="BSA 8/28/24 Mon"/>
Requester	MAC7499
Currency	USD

Item Description ↑↓	Status ↑↓	Price ↑↓	Currency ↑↓	Quantity ↑↓	Unit of Measure ↑↓
2 rows					

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

**Edit Requisition**

[Save](#) [Submit](#)

**Checkout for Requisition ID REQ2089007**

**Order Total 54.57 USD**  
**Pre-Encumbrance Balance 54.57 USD**  
[Pre Encumbrance Details](#)

**Requisition Summary**

<b>Business Unit</b> NWUNV Northwestern University	<b>Priority</b> Medium
<b>Requisition Name</b> BSA 8/28/24 Mon	<b>*Requisition Type</b> MKT
<b>Requester</b> MAC7499 Mon Carreon	iBuyNU Orders
<b>Currency</b> USD	<b>Budget Check Status</b> Valid <a href="#">Budget Details</a>
<a href="#">Header Comments</a>	<a href="#">Check Budget</a> <a href="#">Pre-Check Budget</a>
<a href="#">Preview Approvals</a>	

**Additional Fields**

If you have any questions, please contact [BSA-Procurement@northwestern.edu](mailto:BSA-Procurement@northwestern.edu) for any inquiries.

