Basic Science Administration

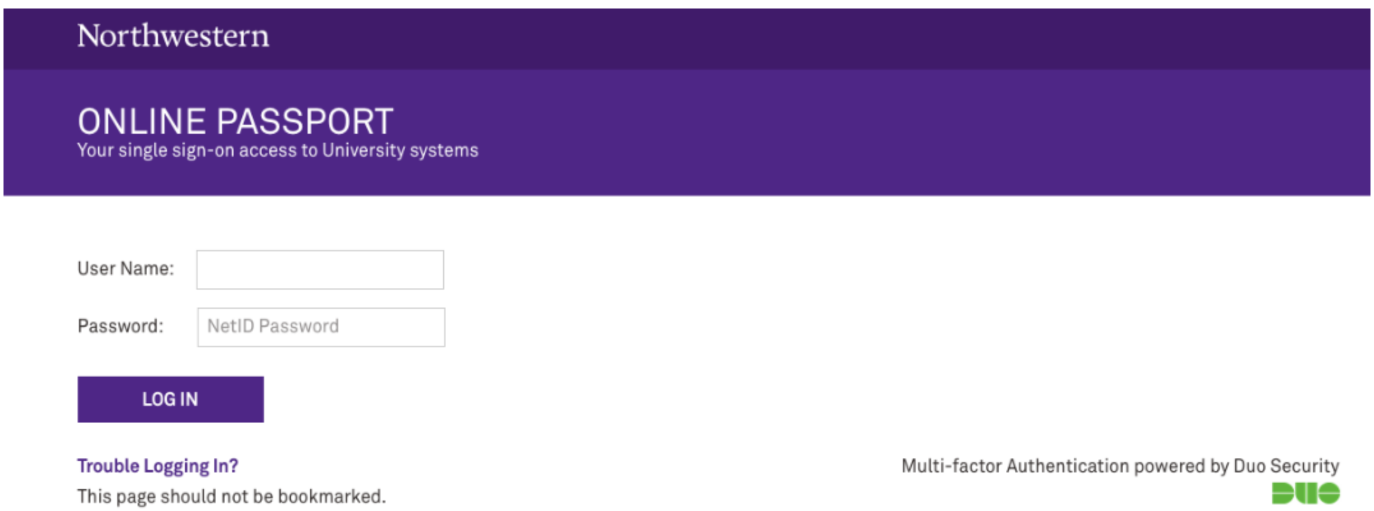
PO Tool Order Guide

SUBMIT PO TOOL ORDER

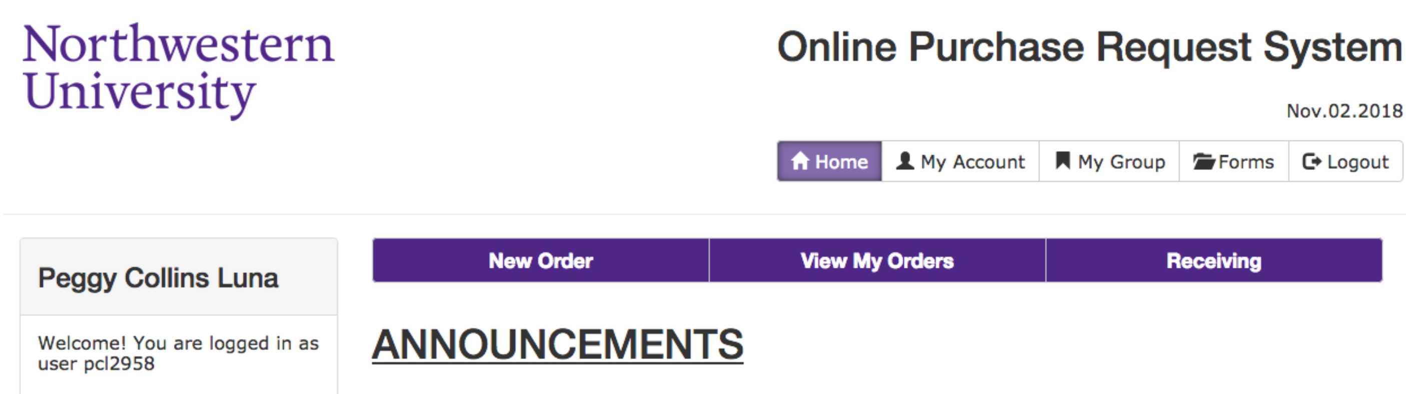
Access the PO Tool

1. Log into the PO Tool at https://bsa.po.northwestern.edu.
2. Enter your Net ID and password.
3. Click **'Log in.'**

*Please note that the PO Tool will time out after a period of inactivity and you will need to log in again to continue with orders. In addition, you must be connected to the Northwestern network/VPN in order to access the system.



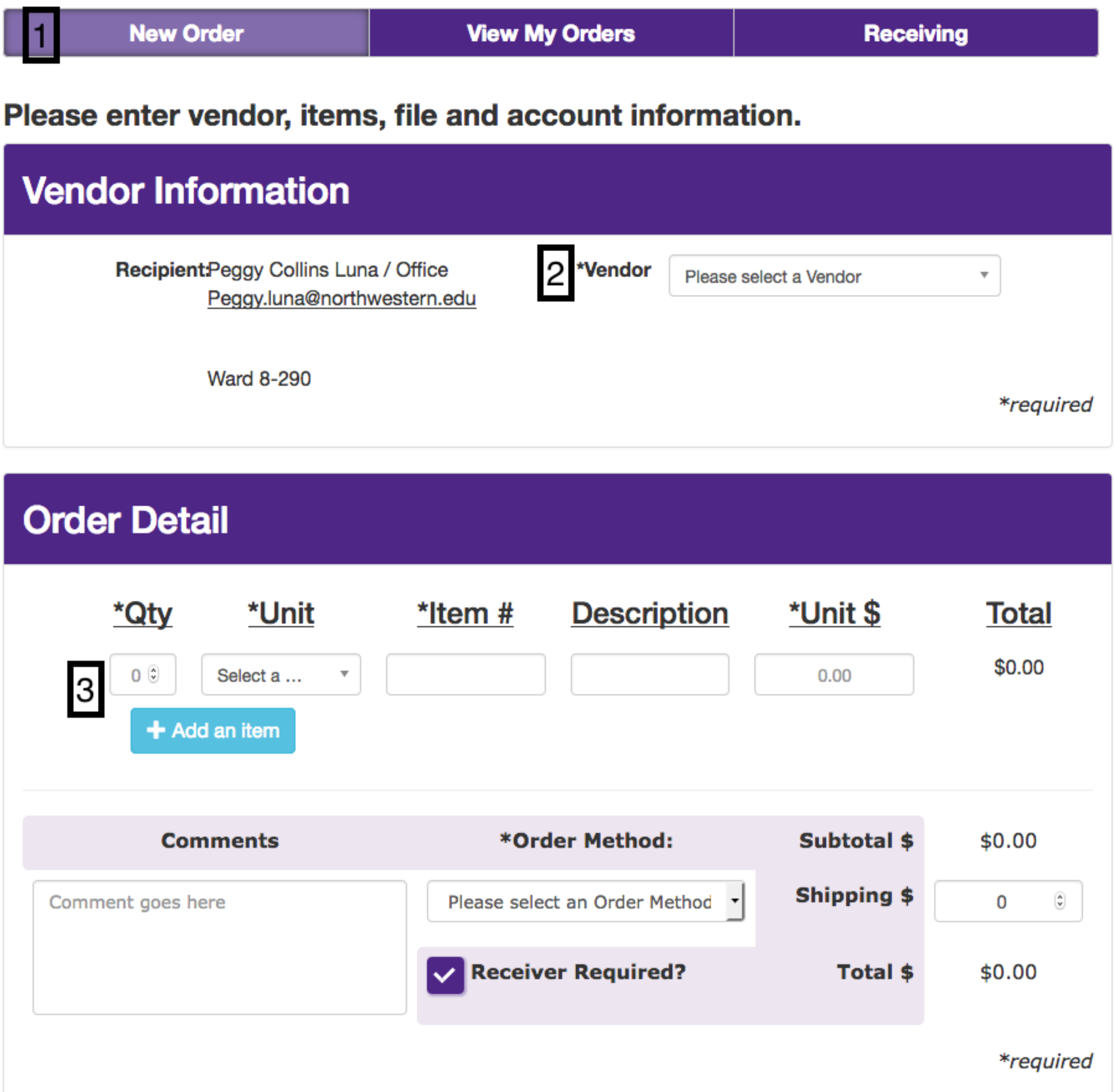
Home Screen



Basic Science Administration

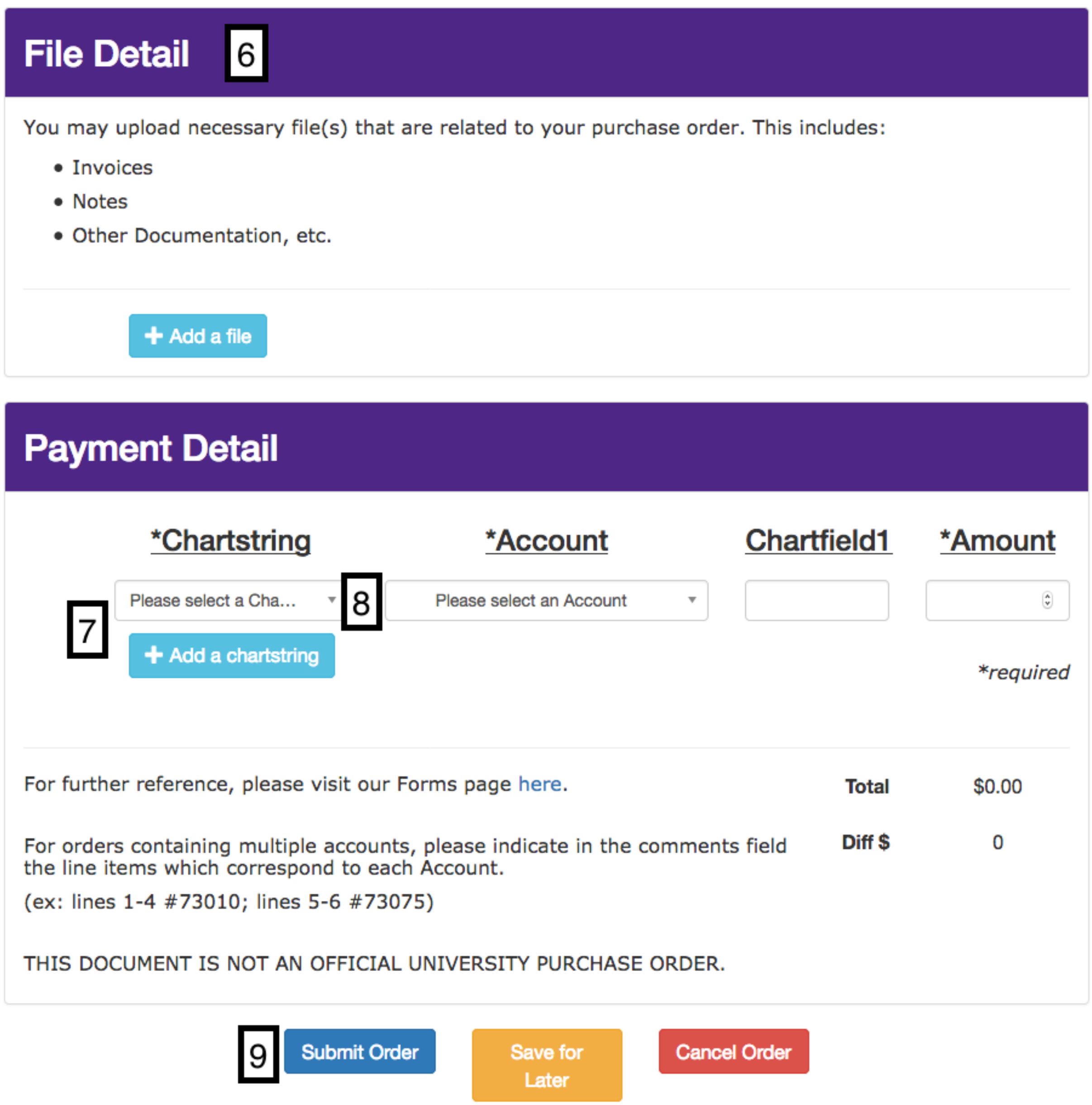
How to enter an order

1. Click the **'New Order'** tab.
2. Choose a vendor from the pull-down menu. If your vendor is not in the list, email BSA-Procurement@northwestern.edu with the vendor's name and website. The financial team will add the new vendor to the list for future use.
3. Enter quantity, unit, catalog number, description (optional), size (if applicable), and the unit cost.
4. Enter any comments about the order that you want the office to know (e.g. item will be picked up from the freezer after receiving a PO; I need the order shipped next day, etc.).
5. Choose an order method from the pull-down menu. The most common is Fax by University, P-Card, or Pay by Invoice (for check requests).



How to enter an order continued

6. In the File Detail section, click **'+Add a file'** to upload attachments including quotes, invoices, agreements, etc.
7. Select the appropriate chart string(s) from the pull-down menu. If your chart string is not in the list, either select an incorrect chart string from the pull-down menu and enter the correct chart string in the Comments field OR email bsa-procurement@northwestern.edu and ask us to add the chart string. If your lab uses DCAM rates, select **'Use DCAM rates.'**
8. Enter the account code and amount for each chart string. If the items should be charged to more than one chart string, click **'+Add a chartstring'** and enter the required information.
9. Review the information you entered then click '**Submit Order**' to send your order for processing.



Basic Science Administration

Purchase Orders

The BSA financial team will enter the PO number into the PO Tool after it is created in NU Financials. Once entered into the PO Tool, the individual who entered the request will receive an email with the PO number.

P-card/Credit Card Payments

The BSA financial team will contact the individual who submitted the request to set up a time to meet. We will provide our credit card information in-person for online orders. For phone orders, provide the order number and we will call the vendor to make the payment.

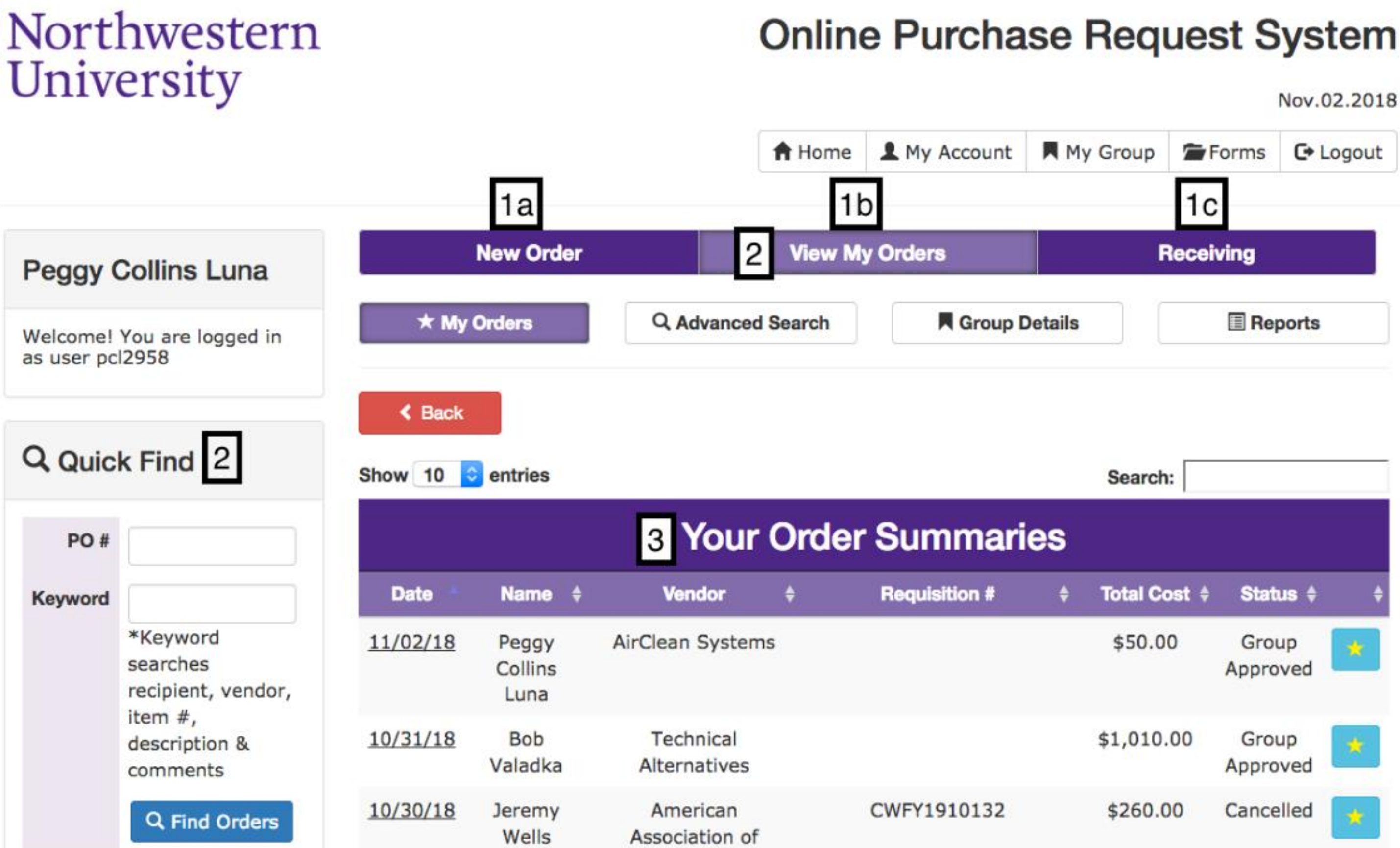
Invoice Payments/Check Requests

For invoices and check requests, submit the request with the invoice, agreement/contract, or other relevant documentation. We will submit the payment as a payment request (PRQ).

Basic Science Administration

How to navigate the PO Tool

1. There are three important tabs for lab staff:
   a. *New Orders* tab – this is where you place new orders.
   b. *View My Orders* tab – this is where you check the order status and search for an order.
   c. *Receiving* tab – this is where you mark when orders have been received.
2. In the '**View My Orders**' tab, you can use the '**Quick Find**' feature to search for orders by PO# or keyword; make sure to check the box for '**Search all orders**.'
3. In the '**Your Order Summaries'** section, you can see all the orders that have been placed by your lab and their current status. Each column can be sorted by clicking the up or down arrow next to the column name. You can also search for a keyword, dollar amount, etc.
4. To cancel an order, please email BSA-Procurement@northwestern.edu.



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