Create a Grant Subcontract Requisition

1. Log in to the NUPortal.
   a. Alternatively, you can login from the NUFinancials Overview page.
2. Click the Requisition tile on the Homepage.
3. Click Create New Requisition.
4. Click Special Requests for Non-Catalog Requisition.

*Note: The University does not use the Due Date field.*

5. Enter Line Item 1 for F&A ($25,000 or less, based on fully executed agreement):
   a. Enter *Item Description.* Enter F&A description and performance period.
   b. Enter *Price.* $25,000 or less. Enter US dollars and decimal. Zeros after the decimal are system-supplied.
   c. Enter *Quantity.* For all grant subcontract requisitions, always enter 1.
   d. Enter *Unit of Measure.* For all special requisitions, always enter EA.
   e. Click the *Category* Make certain the Category for line 1 is Subcontracts < 25K.
   f. In Supplier Name, type the institution with which Northwestern has established the subcontract.

*Note: Make sure you select the same Supplier ID and address row on both lines to ensure only 1 PO is created for the subcontract.*

6. In Supplier Item ID – N/A

*Note: Manufacturer Section: NOT in Use.*

7. If needed, type comments in Additional Information. Comments are applicable to the line item and not the entire requisition.
8. Click the Send to Supplier checkbox if the comments should be sent to the supplier on the purchase order.
9. Show at Receipt box is not typically used or generally recommended.
10. Show at Voucher is not used. – Revisit (other guides say to use this box)
11. Click Add to Cart to add the item to your shopping cart.
12. Enter line item 2 for remaining amount (over $25,000, based on fully executed agreement)
   a. Enter *Item Description.* Enter F&A description and performance period.
   b. Enter *Price.* Remaining balance of the award amount. Enter US dollars and decimal. Zeros after the decimal are system-supplied.
   c. Enter Quantity. For all grant subcontract requisitions, always enter 1.
   d. Enter Unit of Measure. For all special requisitions, always enter EA.
   e. Click the Category Make certain the Category for line 2 is Subcontracts > 25K.

*Note: The non-catalog item fields you entered are saved. When this happens, the fields go blank, so that you can enter another line item.*
13. Your Line(s) will appear next to the shopping cart icon at the top.
14. When you are finishing adding line items, Click Checkout at the top of the page.
15. Enter Requisition Name. This should start with SUBK or other naming convention as determined by your school/department so it is easily recognizable as a grant subcontract when viewing your list of requisitions.
   a. Maximum number of characters is 30.
16. Click on the Requisition Type magnifying glass.
   a. Select Grant Subcontract.

Reminder: Grant Sub Contract Requisitions like Blanket orders will automatically get placed on Hold so that the PO is not sent to the Sub Contractor.

17. To add an Attachment, click the Add button next to the comment bubble.
   a. Click Add Attachment.
      i. Browse for file to attach.
         1. Ex. SSJ for amount over $25,000.
         2. Ex. FEA (fully executed agreement) (PDF from OSR email notification) for back-up of subcontract amount.
18. Once you’ve uploaded the attachment, click OK.
19. To view the hidden section that contains the Ship To and Chart String fields for a line item, click the triangle next to that line item.
20. Click the magnifying glass next to Ship To: to look up the ship to code.
    A Look Up window appears.
21. In the Description field, type the first letters of the department name.
22. Click Look Up.
   b. Click the Ship To location code that matches your department. If there is more than one location for your department, select the one that designates the appropriate drop-off location / delivery point.
23. At this time, you can input the Attention To field, if it hasn’t already populated the correct name.

Note: All chart strings utilize Fund, Dept, and Account codes, at minimum. If you do not know which chart string to use, see your manager.

24. To view the hidden section that contains the chart string fields for a line item, click the triangle next to Accounting Lines.
25. Then click the tab labeled Chartfields2.
26. Enter Fund, Dept, Project, Activity and Account for the chart string. Project and Activity are required for grant chart strings. The Percent field should be 100.

Note: As needed, to enter Project and Activity for Funds 170-199 or 300-899, first confirm that PC Bus Unit contains NWUNV. If PC Bus Unit is blank, enter NWUNV.

Note: For each line on Amount –Only Requisitions (Blankets, Grant Subcontracts, and Receiver by Dollar Amount), you must select the Amount Only checkbox in Line Details.

27. Click the Line Details icon. (Located at right for each requisition line).
28. Select the Amount Only checkbox.
29. Click OK.
30. You can enter **Requisition Comments** if you like, but it is not required.
31. **Approval Justification** comments inform the Dean of the purpose of this request.
32. Scroll down and Click **Check Budget**.
   a. The budget check ensures the chart string(s) is valid and has no spending controls against it that would prevent you from submitting the requisition.
   b. Successful budget checking pre-encumbers or earmarks the funds.
33. A pop-up message appears regarding saving and budget checking the transaction. Click **OK**.

**Note:** A processing icon spins while NUFinancials performs a budget check.

34. When finished budget checking, a **Budget Checking Status** appears.
35. Click **Save & Submit**.
36. After you save and submit, a Confirmation page appears.
   a. The **Requisition ID** is available on this page. This is for internal use ONLY.
   b. The **Requisition** is submitted to workflow for approval.