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.

NEED HELP? Contact IT Support Center • 841-497-4357 (1-HELP) • consultant@northwestern.edu