

# Vendor Request Webinar

Welcome!



NORTHWESTERN  
UNIVERSITY

# Agenda

- What is Changing?
- Benefits
- Security Access
- Vendor Request Process
- Vendor Request demonstration
- Vendor Request Status
- Email Notifications
- Questions



# What is changing?

- The Vendor Request form on the NUPortal is being updated
- The new and improved Vendor Request process will reside within NUFinancials
- Acct Services/TST > Vendor File Management (VFM)
- W-8 required for foreign vendors
- New form begins Friday, July 24<sup>th</sup>!



# Benefits

- Vendor Request Center
  - Search (no need to run Cognos SC025 - Vendor Info Query)
  - Links to training and information
  - Links to required forms
- Foreign Addresses
  - Fields update according to country selected
- Email notifications
  - Copy another NUFinancials user upon approval



# Benefits

- Save a vendor request and return to submit it later (e.g. if you don't have all the Required forms)
- Correct and resubmit a request that has been sent back
- View status and history of your own vendor add/modify requests



# Security Access

- Only users with access to NUFinancials can create and submit Vendor Requests.
  - Current Requester and Online Voucher users already have access
  - New users will need to request the Vendor Request role on the General Security Access form
  - Supervisors will see additional Vendor Request role in yearly audit



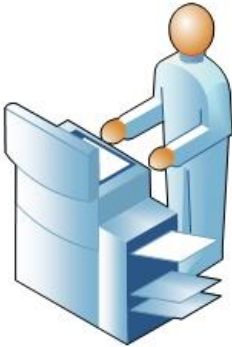
**Vendor Request Process**



Vendor Request Center  
Vendor Look-up



Gather required documentation



Scan documentation



Submit Vendor Request



Vendor File Management  
Review & Approval



Vendor ID  
Created/Updated

# VENDOR REQUEST DEMONSTRATION



NORTHWESTERN  
UNIVERSITY

---





Go to myNU Page

- myNU
- News and Events
- Facilities
- Financial**
- Human Resources
- Research
- Services
- Athletics and Recreation
- Learn@NU
- NUPortal Help

Change Your NetID Password

- Financial
- Accounting
- Budgeting
- Purchasing**
- Payments
- Approval Inbox Rest Test

## Buying at Northwestern

- Purchasing Resource Services has established contracts with Preferred Vendors for the best prices for University purchases.
- Access the [PRS web site](#) for purchasing-related information, including a list of Preferred Vendors, many of which are included in the iBuyNU marketplace.

### Access iBuyNU according to your role:

- **Requester** - access through [catalog requisition in NUFinancials](#)
- **Shopper** - direct access to [iBuyNU secure site](#)

### Non-iBuyNU Vendors

To order from a non-preferred vendor or a preferred vendor not available in iBuyNU, a Requester must enter a [non-catalog requisition](#).

### Orders of \$25,000 or More

- Orders of \$25,000 or more require either a bid process or justification as a sole source.
- Attach a completed [Bid Documentation Form \(.doc\)](#) or [Sole Source Justification \(.doc\)](#) to the requisition.

## Vendor Add/Maintenance

### [Vendor Request Center](#)

Search for, add, or modify vendors

*NUFinancials access required: Users who can create Requisitions and Online Vouchers can request Vendors without further security access.*

### [Vendor Policy & Procedure](#)

Guides, instructions and other resources

## Purchasing Resources and Forms

## Approval Inbox

Actuals Journal	<a href="#">0</a>
Budget Journal	<a href="#">0</a>
Cash Advance	<a href="#">0</a>
Expense Report	<a href="#">0</a>
Online Voucher	<a href="#">0</a>
Requisition	<a href="#">0</a>
Travel Authorization	<a href="#">0</a>
Total Approvals	<a href="#">0</a>

[Update Counts](#)

## Purchasing Related Links

- [Bid Process](#)
- [Financial Policies and Procedures](#)
- [Lifecycle Viewer](#)
- [Make Changes to a PO](#)
- [PO Terms](#)
- [Preferred Vendors](#)
- [Purchasing Definitions](#)
- [Purchasing Policy](#)
- [Purchasing Policy Quick Guide](#)
- [Purchasing Resource Services](#)
- [Signature Authority and Approvals](#)
- [Training Guides: Add/Update Vendor](#)



Go to myNU Page

- myNU
- News and Events
- Facilities
- Financial**
- Human Resources
- Research
- Services
- Athletics and Recreation
- Learn@NU
- NUPortal Help

Change Your NetID Password

- Financial
- Accounting
- Budgeting
- Purchasing
- Payments**
- Approval Inbox Rest Test

### Expense Reports

- [Create a new Expense Report](#)
- [Find/Modify Existing Expense Report](#)
- [Entertainment & Courtesy Guidelines](#)
- [Expenses Entry Quick Reference Sheet](#)
- [Expense Policy Exception Request](#)
- [Set up Proxy Access to Enter Expenses for Someone Else](#)
- [Travel Policies & Procedures](#)
- [Visitor's Expense Report](#)

### Online Vouchers

- [Online Voucher Entry Page](#)
- [Financial Policies & Procedures](#)
- [Purchasing Policy](#)
- [ASRSP Online Voucher Policy](#)
- [Contracted Services Form for U.S. Residents](#)
- [Visitor's Expense Report](#)

### Vendor Add/Maintenance

- [Vendor Request Center](#)  
Search for, add, or modify vendors  
*NUFinancials access required: Users who can create Requisitions and Online Vouchers can request Vendors without further security access.*
- [Vendor Policy & Procedure](#)  
Guides, instructions and other resources

### Approval Inbox

- Actuals Journal [0](#)
- Budget Journal [0](#)
- Cash Advance [0](#)
- Expense Report [0](#)
- Online Voucher [0](#)
- Requisition [0](#)
- Travel Authorization [0](#)
- Total Approvals [0](#)
- [Update Counts](#)

### Payments Related Links

- [Accounts Payable](#)
- [Direct Payment Request](#)
- [DPR Paper Form](#)
- [Financial Policies and Procedures](#)
- [Lifecycle Viewer](#)
- [Payment, Reimbursement, & Refund Forms](#)
- [Training Guide: Add/Update Vendor](#)
- [90 Day Justification Memo Form](#)

### Training

# Vendor Request Status

- **Saved** - created and saved but not submitted
- **Submitted** - saved and submitted
- **Pending** - reviewed and validated for compliance by VFM; it is not yet approved
- **Created** - approved by VFM; the vendor ID has been created/updated
- **Send Back** - sent back by VFM; review comments
- **Withdrawn** – canceled by either the submitter or VFM



# Email Notifications

- Successfully saved and submitted to VFM
- Sent back by VFM and requires your attention
- Approved by VFM and the vendor ID is ready for use
- Withdrawn and the request has been canceled by VFM



# Questions

1. What type of vendor is a visitor reimbursement classified as?
  - a) Independent Contractor
  - b) Supplier
  - c) Attorney
  - d) Refund



# Questions

2. What is the Vendor Remit contact email address used for?
  - NU will email a choice of payment methods to this contact



# Questions

3. Name a piece of documentation required for an Independent Contractor vendor request
  - ICQ (Independent Contractor Questionnaire)
  - W-9 or W-8
  - COI (Conflict of Interest)



# Questions?

- Vendor File Management, 1-4707
- NUIT Support Center, 1-HELP
- Open Lab
  - <http://ffra.northwestern.edu/training/openlabs.html>
- Training materials
  - <http://ffra.northwestern.edu/training/curriculum.html>

