

## Requesters Basic Topics

**Course Level: Introductory**

**Audience: Financial and business administrators and assistants or anyone with the security access role of Requester.**

### Course Format

This course is a combination of online learning and instructor-led classroom training. Online learning is provided both before and after class. While not required, you are strongly encouraged to view the Before Class offerings in order to build background for the class. Similarly, after the class, you are encouraged to participate in online learning to refresh or consolidate your knowledge.

### Course Registration and Enrollment

Register for the classroom training, FMS803 Requesters Basic Topics in eDev.

### Course Completion

The instructor marks you complete after you attend the Requesters Advanced Topics class.

### System Requirements

Project Café's online learning works best with Internet Explorer. Exercises function properly only in Internet Explorer. You will need to install the Adobe Flash player, if not already installed.

## Learning Sequence

#	Title	Type	Notes and Instructions
Before Class			
1	Procurement (Purchasing) Overview	Overview	Learn about the various ways you can purchase goods and services at the University. <ul style="list-style-type: none"> <li>You may need to turn up your audio volume.</li> <li>This overview is linked at the top of the Purchasing page, above each of the Purchasing courses.</li> </ul>
2	Distinguish between Catalog and Non-Catalog Requisitions	Presentation	Learn the difference between the two types of requisitions. <i>You may need to turn up your audio volume.</i>
Course Session			
3	FMS803 Requesters Basic Topics	Classroom	Learn to enter requisitions for catalog and non-catalog purchases. Enter non-catalog special requisitions, called "amount-only" requisitions. View your submitted requisitions and enter receipts for non-catalog purchases of \$500 or more.
After Class			
Catalog Requisitions			
4	Create a Catalog Requisition	Demonstration	See how to shop in iBuyNU and submit the requisition in NUFinancials. <i>You may need to turn up your audio volume.</i>
5	Create a Catalog Requisition from a Shopper's Assigned Cart	Demonstration	See how to complete and submit a requisition on behalf of a Shopper. <i>You may need to turn up your audio volume.</i>
6	Introducing the iBuyNU Interface	Webinar	View a recorded webinar to refresh your knowledge of iBuyNU navigation and features. <i>You may need to turn up your audio volume.</i>
Non-Catalog Requisitions			

7	Create a Non-Catalog Requisition	Exercise	Complete a simulation to test your knowledge of how to enter a non-catalog requisition. <i>This does not contain audio.</i>
8	Create a Blanket Requisition	Exercise	Complete a simulation to test your knowledge of how to enter a non-catalog special requisition for a recurring service. <i>This does not contain audio.</i>
Library			
NA	Training materials provide performance support for topics covered before, after, and during class. The section "Manage Requisitions" contains training materials for eProcurement > Manage Requisitions, the page where you can view your saved and submitted requisitions. For materials about receipts, please see FMS816 Receipts.		

## Related Resources

These are links to related business processes and policy.

### Helpful Policy Links

Refer to the Financial Operations website for guidance about the policies and procedures governing financial transactions.

<http://www.northwestern.edu/financial-operations/policies-procedures/policies/index.html>

### Helpful Contacts

- Purchasing Resource Services (PRS) for requisitions and purchase orders. Use PRS as your definitive guide to purchasing policy.
- Accounts Payable (AP) for invoices, vouchers, and payments.
- Accounting Services for Sponsored Research Programs (ASRSP) for financial and policy issues related to transactions using grant related chart strings.

### Helpful Reports

- GE007 Security Access Profile: You can verify that your Requester security access has come through by running this report and checking for the Requester role.
- SC016 Open Encumbrances: Get a list of all departmental requisitions that have been approved and sourced into purchase orders but not yet been paid or paid in full.