



# University of Connecticut Health Center HuskyBuy Training Manual

PROCEDURE NUMBER: 2010-P5

## HOW TO PURCHASE FROM A CATALOG SUPPLIER

### OVERVIEW:

A Catalog Supplier is a Supplier who has a price list of their products and/or services available through HuskyBuy. There are two types of catalogs, hosted and punch out. A Hosted catalog is an online version of a Supplier's printed catalog. Hosted catalogs contain contracted product data and details, along with contract pricing information for each item. A punch out catalog is an integrated external link to a Supplier's web based catalog.

### PROCEDURE:

#### STEP 1: SEARCHING FOR A SUPPLIER

You can browse the Supplier's list to search for a Supplier that you would like to order from. The list identifies the type of Supplier (i.e. hosted, punch-out or non-catalog). If you do not know the name of the Supplier who supplies the product or service you are requesting, proceed to *Step 2: Searching For A Product* to continue.

- Select the **home/shop** navigation tab.
- Select the **shop** sub-tab.
- Click on **suppliers** adjacent to the word **Browse:** on the home page.

**NOTE:** A partial list of Suppliers is also showcased on the home/shop page.

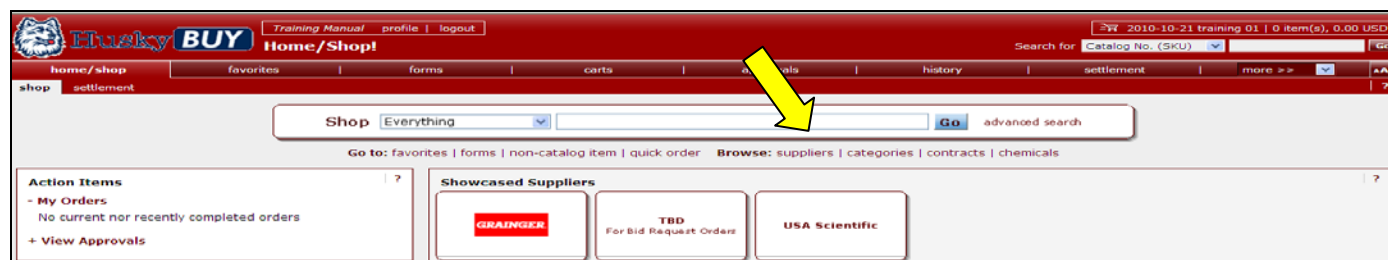


Figure 1

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- Click on “+” to expand the **Search for Supplier Filter**.

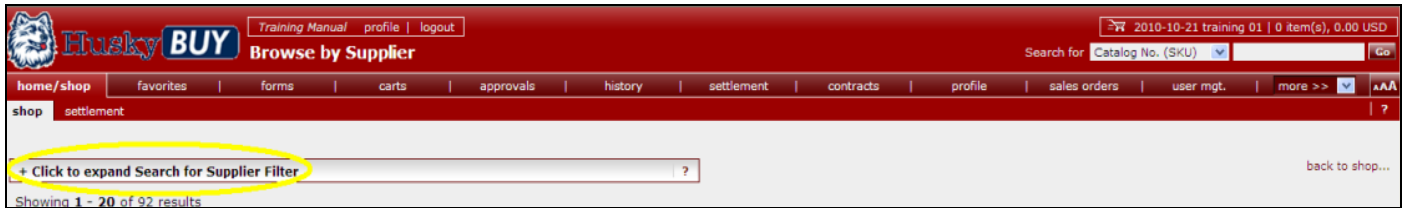


Figure 2

- **Supplier** – enter the name of the Supplier.
- **Supplier Type** – click on the drop-down arrow and select **All**.
- Click on **Search**.

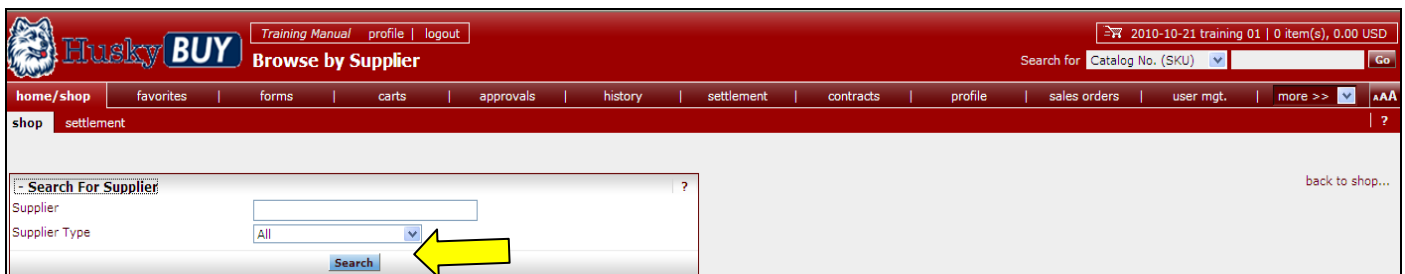


Figure 3

- If you received the following message “No Supplier Records Found”, proceed to *Procedure #2010-P9 How To Request A New Supplier* for further instructions.

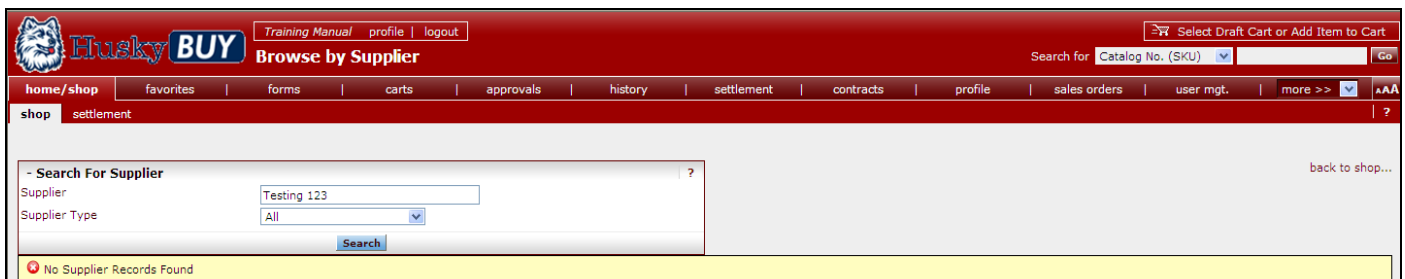





Figure 4

- If the Supplier ONLY has non-catalog icon , proceed to *Procedure #2010-P6 How To Purchase From A Non-Catalog Supplier* for further instructions.
- If the Supplier has a hosted catalog icon , proceed to *Step 2: Searching For A Product* to continue.
- If the Supplier has a punch-out catalog icon , proceed to *Step 3: Adding A Catalog Product To Your Shopping Cart* to continue.

**NOTE:** Some Suppliers have more than one catalog icon. The reason for multiple catalog icons is that not all of the Supplier's products are available through the hosted or punch out catalogs. The non-catalog icon allows you to submit a purchase request for an item not available through the hosted or punch out catalogs.

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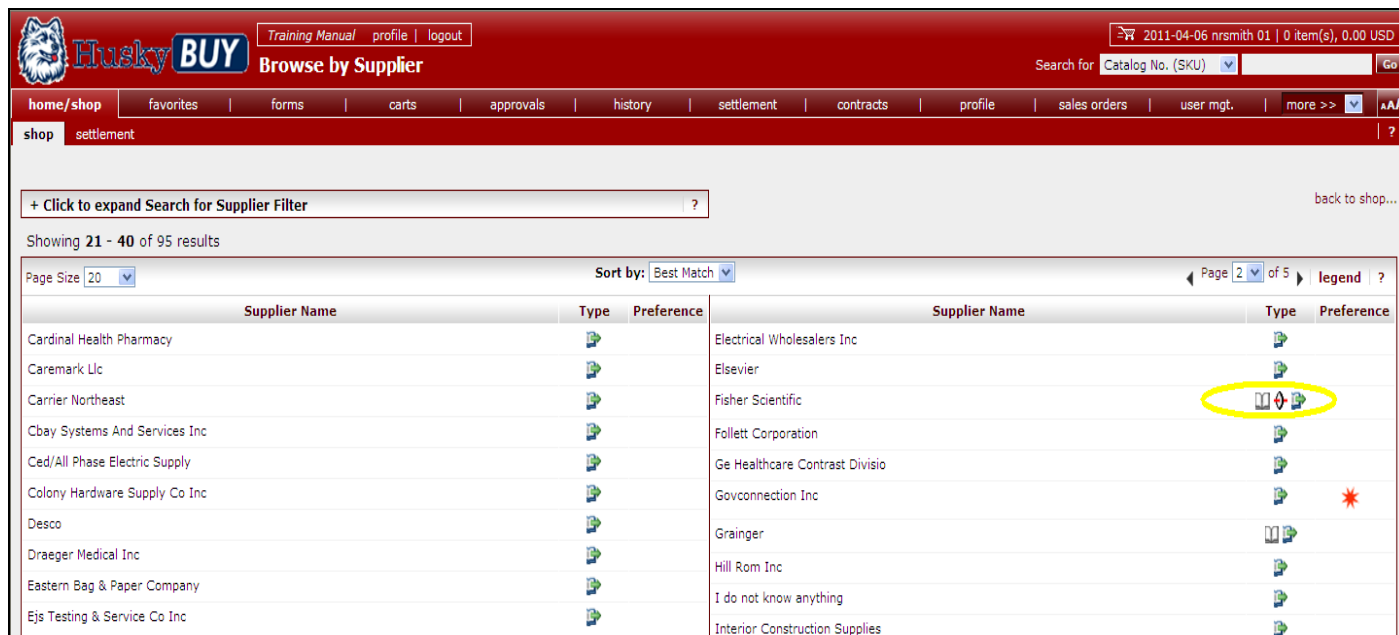
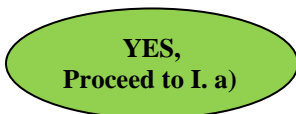



Figure 5

## STEP 2: SEARCHING FOR A PRODUCT

Products and/or services provided by a non-catalog Supplier are not available through these searching methods. Products provided by a hosted catalog Supplier is available when performing a product search on HuskyBuy. If the Supplier has a punch out catalog you will have to punch out to the Supplier's website to search for a product. View audio visual *Lesson #4 Searching Methods* for additional information.

- I. Do you know the name of the Supplier who supplies the product you are searching for?



- a) After you have browsed the supplier's list and located the Supplier, click on the **hosted catalog icon**  next to the Supplier's name to start searching for the product.
  - Not all products offered by the Supplier are available on the hosted catalog. If the product is not available on the hosted catalog then proceed to *Procedure #2010-P6 How To Purchase From A Non-Catalog Supplier* for further instructions.
  - Under the categories list you have the option to expand the **category** by clicking on "+" to view a list of sub categories.
  - Click on **view (incl. sub-categories)** next to the category you want to purchase from to view a list of products.

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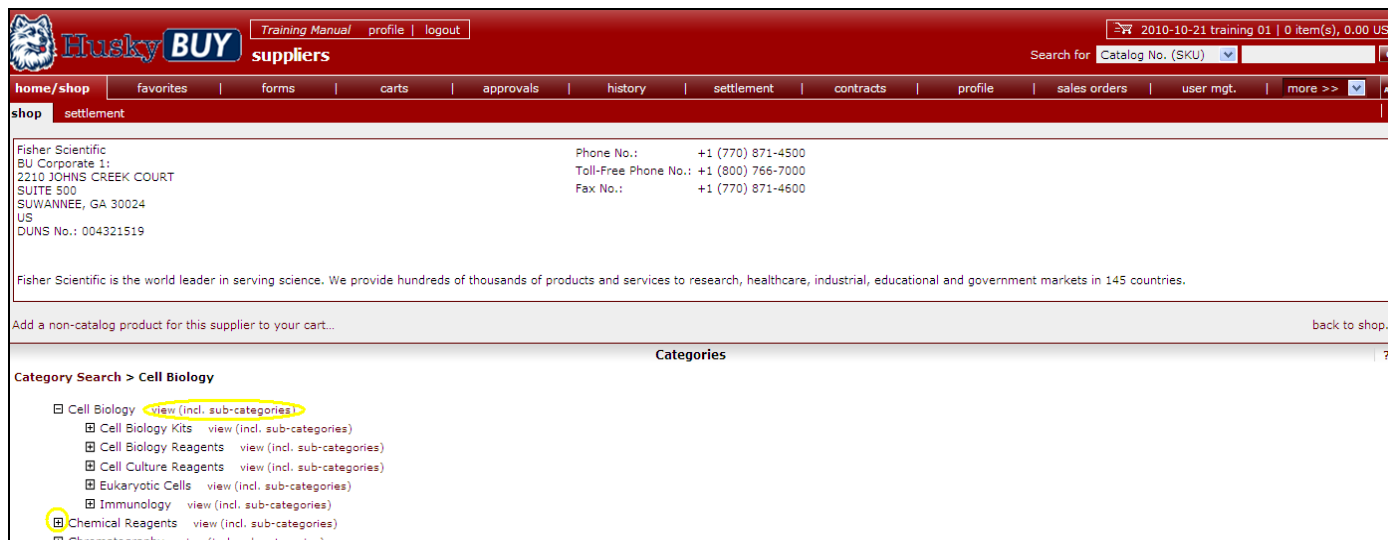


Figure 6

- You have the ability to filter your results **By Product Flag, Supplier, Category, Packaging UOM, Result Type** and **By Manufacturer Name**.
- You also have the ability to sort your products and view a list per page.
  - o **Products per page** – allows you to sort between 5 - 200 products per page.
  - o **Sort by** - allows you to sort products by best of match, part number, description, size, packaging, UOM (unit of measure), supplier, price: low to high and price: high to low.
  - o **Page** – allows you to navigate to the next page if there are multiple pages.
- Proceed *Step 3: Adding A Catalog Product To Your Shopping Cart* to continue.

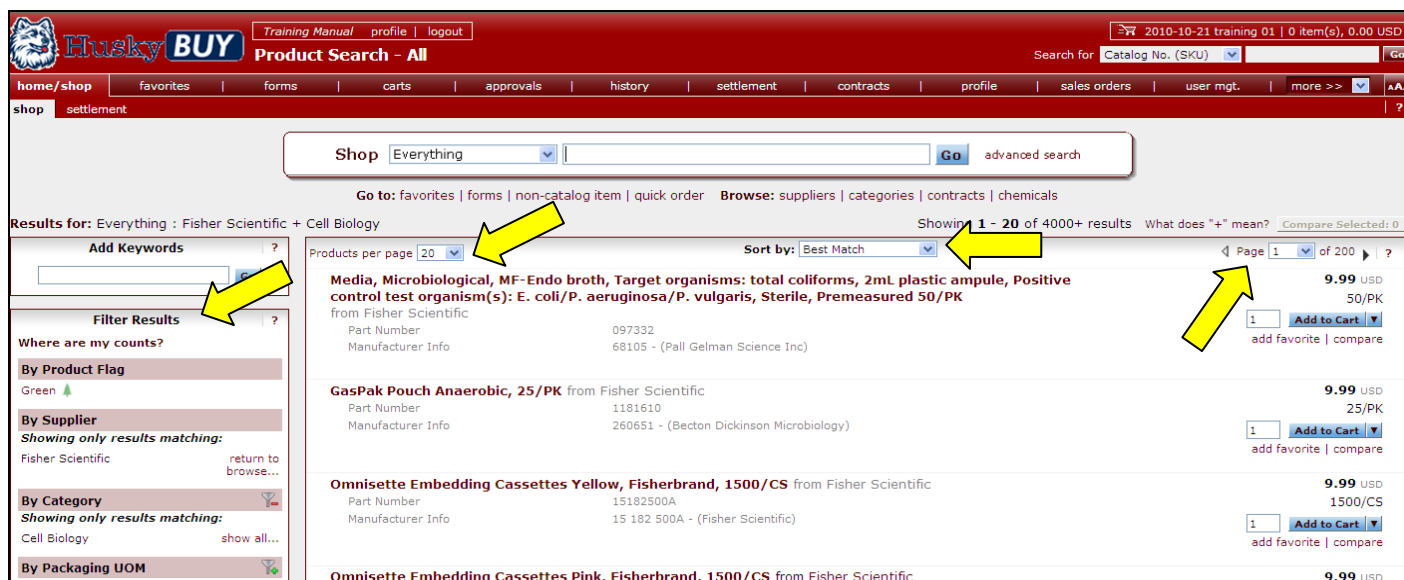


Figure 7

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b) If you want to purchase a particular product and unsure who supplies the product you can perform a **quick order**, **simple search**, **quick search** or an **advanced search**.

- To perform a **quick order** proceed as follows:
  - o Select the **home/shop** navigation tab.
  - o Select the **shop** on sub-tab.
  - o Click on **quick order** adjacent to the word **Go to:** on the home page.

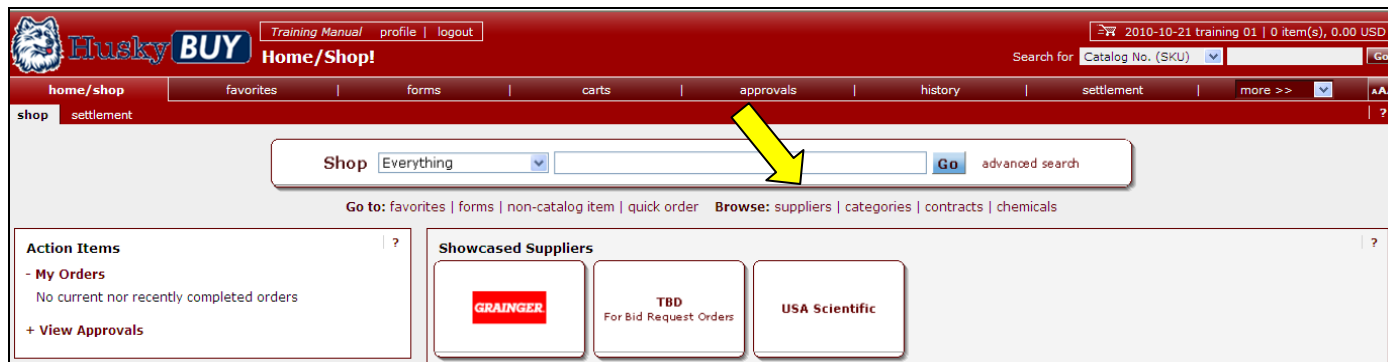


Figure 8

- o **Category** – click on the drop-down arrow to select a category type.
- o **Part Number (SKU)** – enter in the part number of the product you want to purchase.
- o Click on **Add to Active Cart**.
- o If you received the following message: “The item was successfully added to your cart”, proceed to *Step 3: Adding A Catalog Product To Your Shopping Cart* to continue.

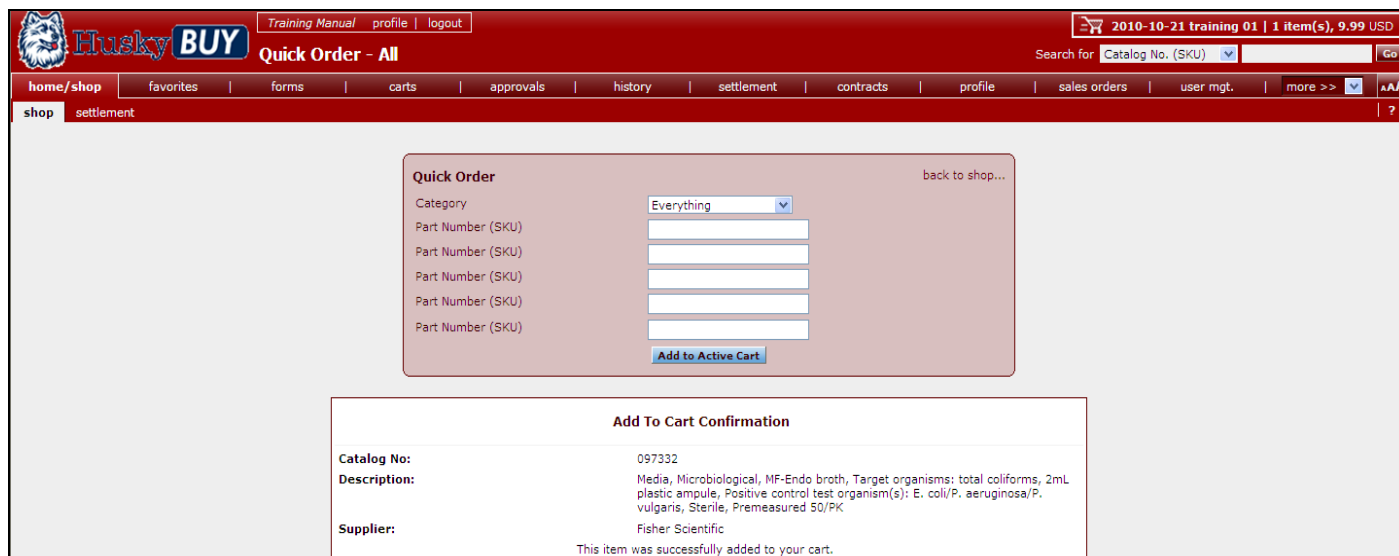


Figure 9

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- o If you did not receive any search results for the part number (SKU) you will receive the following message: "No results returned Add Non-Catalog Item".

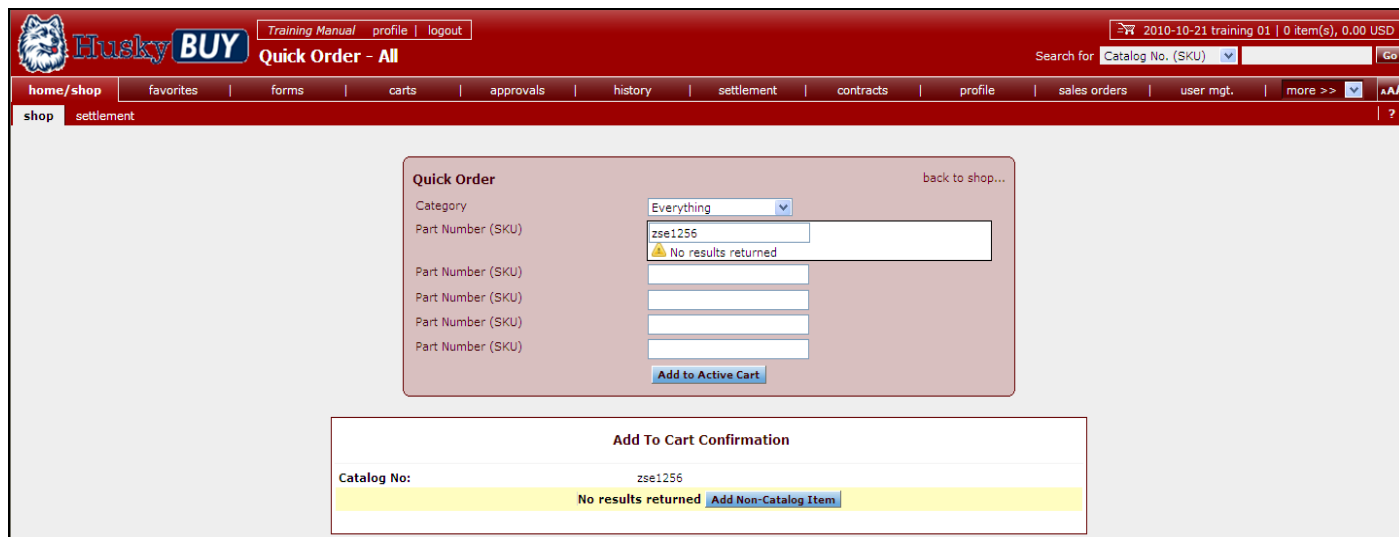


Figure 10

- To perform a **simple search** proceed as follows:
  - o Select the **home/shop** navigation tab.
  - o Select the **shop** sub-tab.
  - o Under the **Shop At The Top** section is a drop-down menu of various product verticals which allows you to limit your search to a certain commodity. The product vertical "everything" will allow you to search all commodities.
  - o Type what it is you are searching for in the window.
  - o Click on **Go**.
  - o If you located the product within your search results, proceed to *Step 3: Adding A Catalog Product To Your Shopping Cart* to continue.

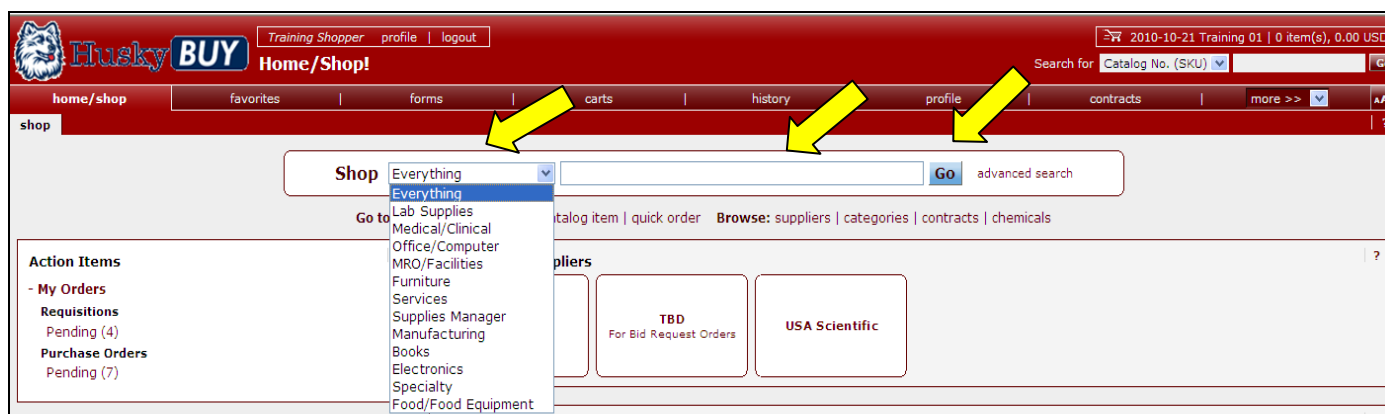


Figure 11

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- o If you did not receive any search results you will receive the following message: "No Items found for \_\_\_\_\_".

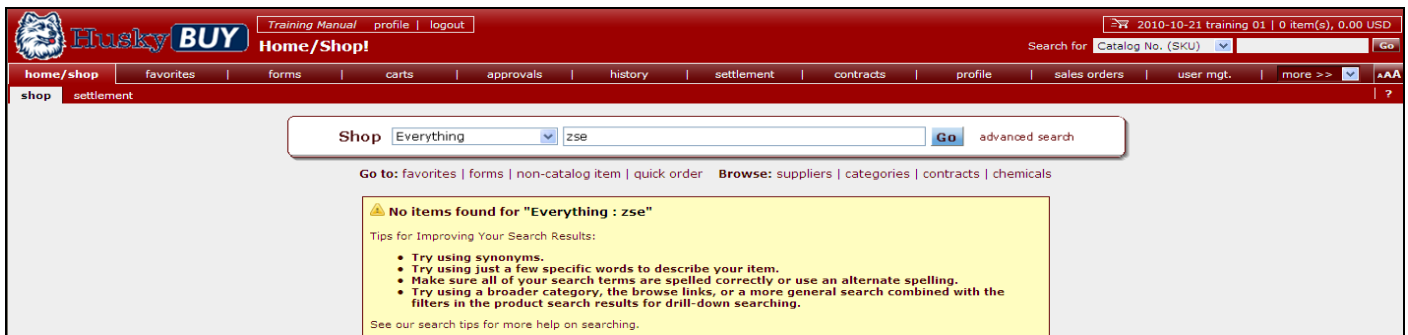


Figure 12

- To perform a **quick search** proceed as follows:
  - o The quick search is located at the top right hand corner of HuskyBuy.
  - o **Search for** – click on the drop-down arrow to select a search option.
  - o Type what it is you are searching for in the window.
  - o Click on **Go**.
  - o If you located the product within your search results, proceed to *Step 3: Adding A Catalog Product To Your Shopping Cart* to continue.

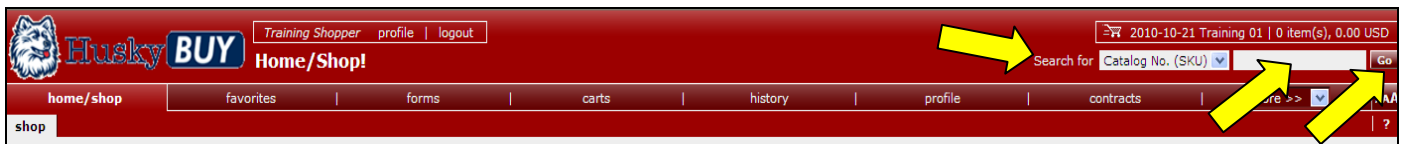


Figure 13

- o If you did not receive any search results you will receive the following message: "No Items found for \_\_\_\_\_".

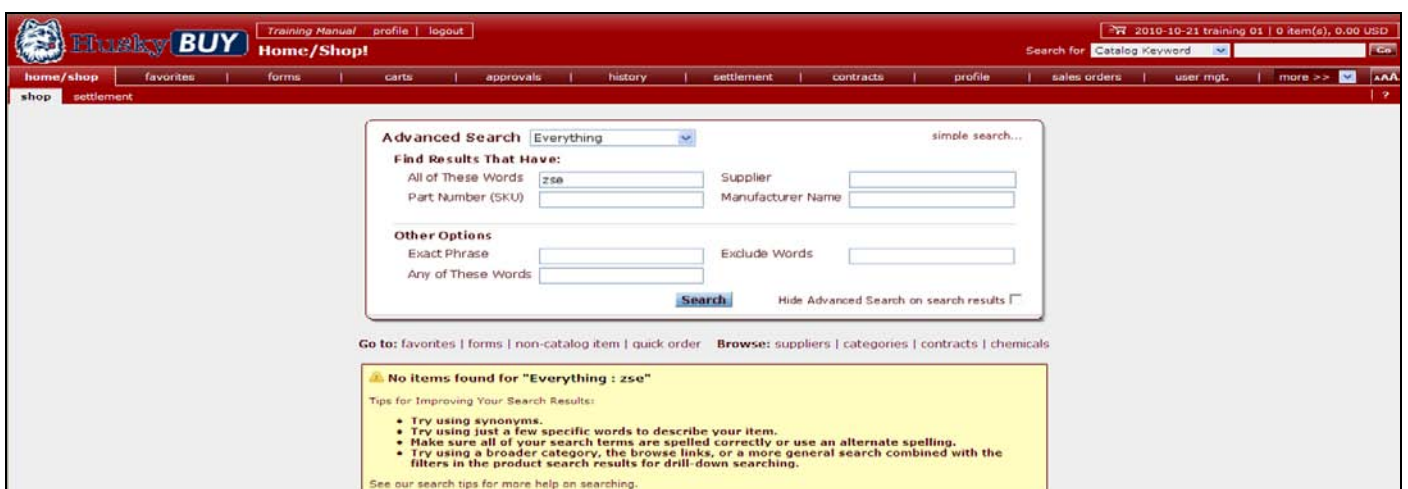


Figure 14

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- To perform an **advanced search** proceed as follows:
  - o Select the **home/shop** navigation tab.
  - o Select the **shop** sub-tab.
  - o Click on **advanced search**.

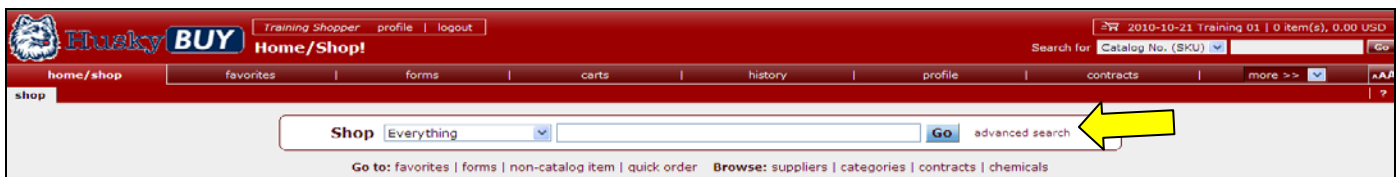


Figure 15

- o **Advanced Search** – click on the drop-down arrow to select a product vertical.
- o Type what it is you are searching for in any of the search option windows.
- o Click on **Search**.
- o If you located the product within your search results, proceed to *Step 3: Adding A Catalog Product To Your Shopping Cart* to continue.

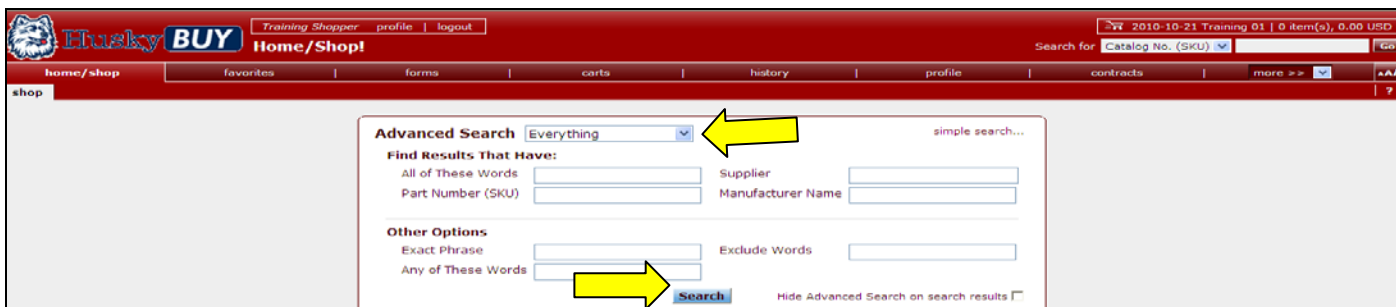


Figure 16

- o If you did not receive any search results you will receive the following message: "No Items found for \_\_\_\_\_".

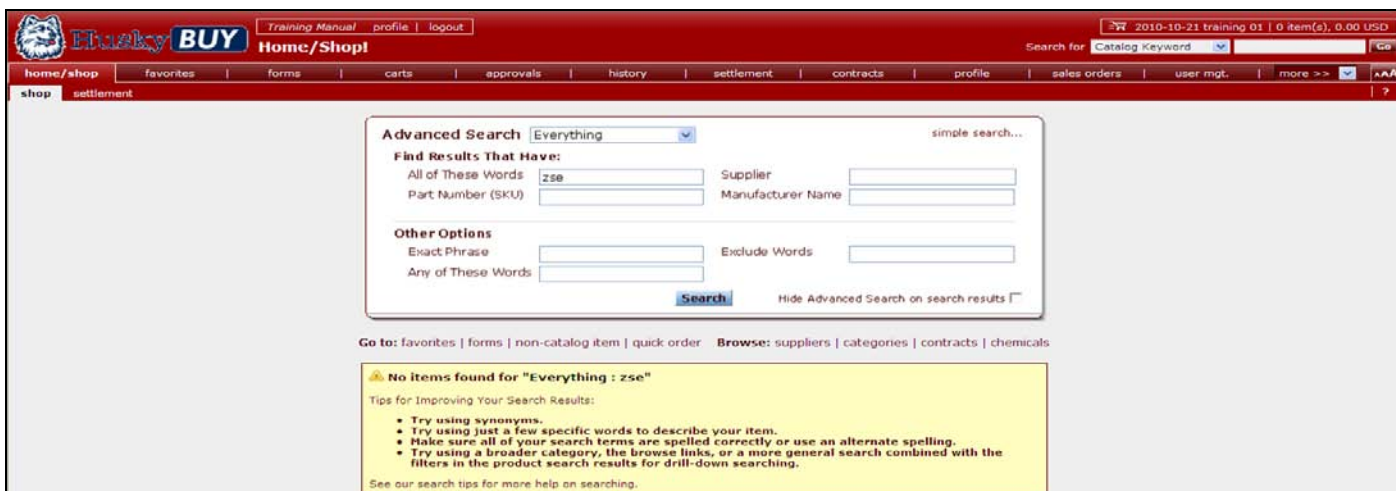


Figure 17

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**NOTE:** If you are unable to find the product you were searching for and unsure of who Supplies the product, please contact the Purchasing Services Department to receive help on identifying a Supplier.

### STEP 3: ADDING A CATALOG PRODUCT TO YOUR SHOPPING CART

There are quite a few alternatives to adding a product to your shopping cart from a hosted catalog. A punch-out catalog allows you to shop directly on the Supplier's website. Once you complete and submit your shopping cart on the Supplier's website, all items will automatically transfer over to your HuskyBuy shopping cart. View audio visual *Lesson #6 Shopping Cart Functionality* for additional information. View audio visual *Lesson #5 Managing Favorites* for additional information.

I. Does the Supplier have a hosted catalog?



- a) Once you have completed the product search and located the product, you will have several options to add a product to your shopping cart.
- **ADD TO CART OPTION 1:** You can double-click on the product name and a new window will appear with detailed information about the supplier and product.
    - o **Add To Active Cart** – will add the item to your currently active shopping cart.
    - o **Add To Favorites** – will add the item to a destination folder. You have the ability to rename the item as well as create a new folder.
    - o **Add To Draft Cart** – will add the item to an existing draft shopping cart.
    - o Click on the drop-down arrow to choose an “add to” preference and click on **Go**.

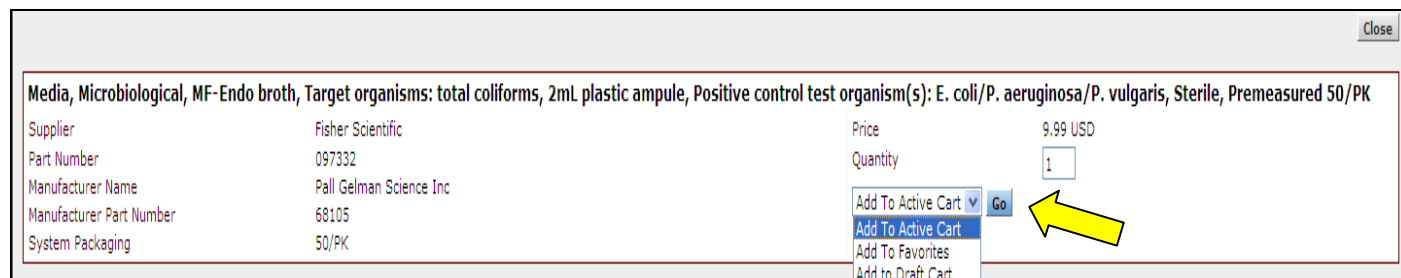


Figure 18

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- **ADD TO CART OPTION 2:** You can click on **Add to Cart** and a note will appear allowing you to view how many items were added to your cart.
  - o **Add Favorite** – will add the item to a destination folder. You have the ability to rename the item as well as create a new folder.
  - o **Compare** – will allow you to compare the selected item with other items. Once you have clicked on “**compare**” it will change to “**remove**” with a green check mark, which will allow you to remove the item from your comparable list.
  - o Click on the drop-down arrow located to the right of the **Add to Cart** field to choose an “add to” preference.

**NOTE:** To review your comparable list you must click on Compare Selected.



Figure 19



Figure 20

b) Proceed to *Step 4: General Information* to continue.

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## II. Does the Supplier have a punch-out catalog?



a) After you have browsed the supplier's list and located the Supplier, click on the **punch-out catalog icon** next to the Supplier's name.

- Not all products offered by the Supplier are available on the punch-out catalog.
  - o If the product is not available on the punch-out catalog then proceed to *Procedure #2010-P6 How To Purchase From A Non-Catalog Supplier* for further instructions.
- You will be redirected to the Supplier's website.
- Proceed with ordering from the Supplier's website and add products to your shopping cart.
- Once you complete your shopping cart on the Supplier's website you will be redirected back to HuskyBuy.

b) Proceed to *Step 4: General Information* to continue.

## STEP 4: GENERAL INFORMATION

The general section contains descriptive information about your purchase request. If your role is a Shopper and you are unsure what to complete in this section you can assign your cart to a Requisitioner or Approver and he/she will complete this section once they are ready to submit the purchase requisition.

- Under the **carts** navigation tab and **active cart** sub-tab click on **Proceed to Checkout**.

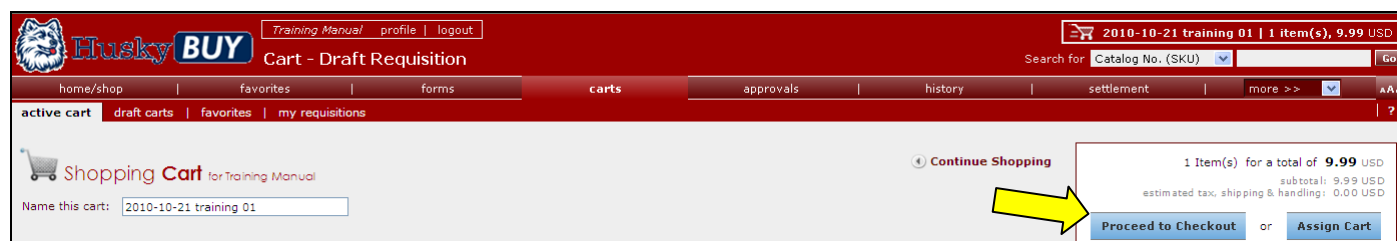


Figure 21

- Click on the **Requisition** and **Summary** sub-tabs.
- Under the **General** Information section click on **edit**.

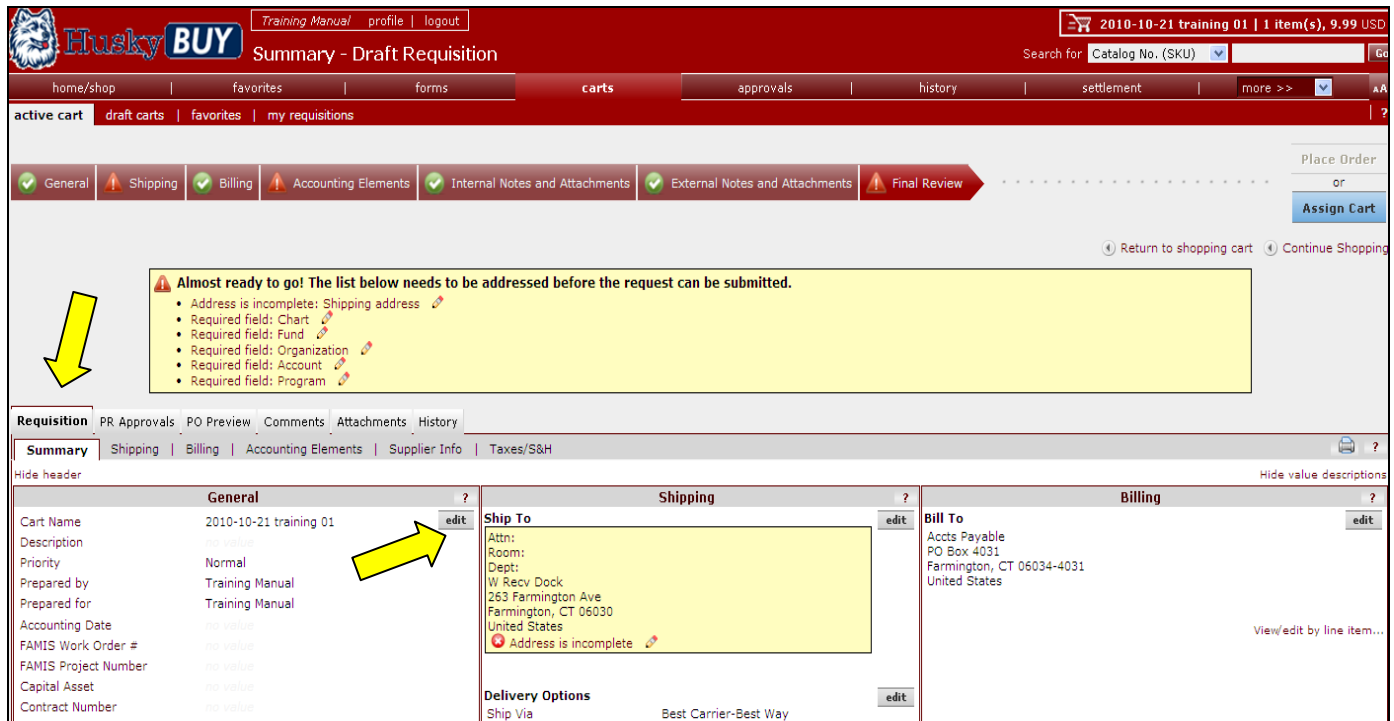


Figure 22

- **Description** – this is an optional field in which you can list any description that will help you identify the purpose of the requisition.
- **Priority** – click on the drop-down arrow and choose an appropriate priority for this order. An urgent priority will flag the requisition through the rest of the order creation process.
- **Prepared by** – this field will automatically populate with the profile name of the person who prepared the shopping cart.
- **Prepared for** – this field will automatically populate with the profile name of the person who prepared the shopping cart, except if the order was assigned it will list the profile name of the Assignee.
- **Accounting Date** - assign an accounting date to be associated with the requisition if needed.
- **FAMIS Work Order #** – enter the FAMIS work order number if applicable.
- **FAMIS Project Number** – enter the FAMIS project number if applicable.
- **Capital Asset** - enter the capital asset number if applicable.
- **IT Project Number** – enter the IT project number if applicable.
- **IT Work Order #** - enter the IT work order number if applicable.
- Click on **Save**.

**NOTE:** If this order is an emergency or a sole source purchase, be sure to select an urgent priority.

Figure 23

## STEP 5: SHIPPING

The shipping section is a required field which contains information relating to the delivery and shipping instructions for your purchase request. If your role is a Shopper and you are unsure what to complete in this section you can assign your cart to a Requisitioner or Approver and he/she will complete this section once they are ready to submit the purchase requisition.

- Click on the **Requisition** and **Shipping** sub-tabs.
- Under the **Shipping** section click on **edit** next to **Ship To**.

Figure 24

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- **Shipping Address** – click on the drop-down arrow to select an address.
- **Attn** – enter the name of the person to whom your order should be shipped to.
- **Room** – enter the room number or mail code of the person referenced in the Attn field.
- **Dept** – enter the department name of the person referenced in the Attn field.
- Click on **Save**.

**NOTE:** To choose a different shipping address, you must click on click here.

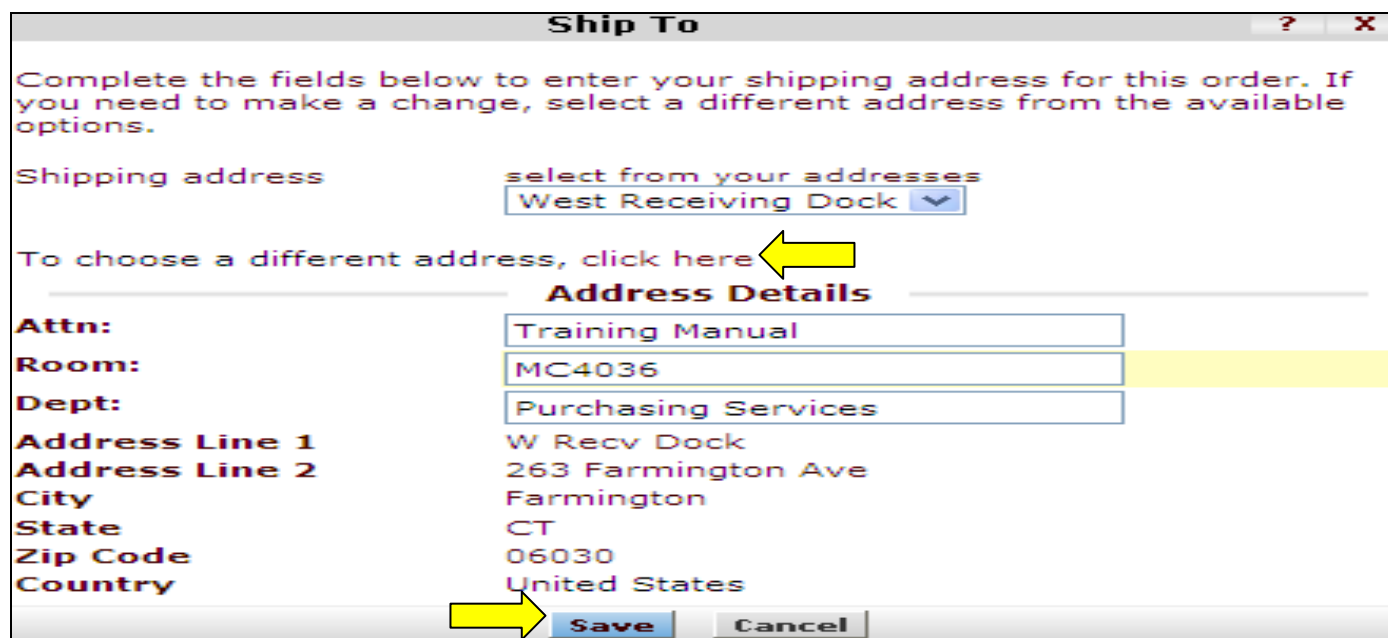


Figure 25

I. Is each line item within your shopping cart being shipped to the same address?

YES,  
Proceed to I. a)

NO,  
Proceed to I. b)

a) Proceed to *Step 5 Section I. c)* to select delivery options.

b) Under the **Supplier/Line Item Detail** section click on **edit** next to **Ship to (same as header)** of the line item in which you want to enter a different shipping address.

**NOTE:** The ship to information that was selected under the shipping section will automatically populate for all line items. If you have decided to assign multiple shipping destinations for your purchase request you must remember to indicate ship to information for that particular line item. You have the option to copy ship to information from one line to another.

The screenshot shows a procurement system interface. At the top, there are tabs for 'Requisition', 'PR Approvals', 'PO Preview', 'Comments', 'Attachments', and 'History'. Below these are sub-tabs for 'Summary', 'Shipping', 'Billing', 'Accounting Elements', 'Supplier Info', and 'Taxes/S&H'. The 'Shipping' section is expanded, showing 'Ship To' and 'Delivery Options' fields. The 'Ship To' field contains the following information: Attn: Training Manual, Room: MC4036, Dept: Purchasing Services, W Recv Dock, 263 Farmington Ave, Farmington, CT 06030, United States. The 'Delivery Options' field shows 'Ship Via: Best Carrier-Best Way' and 'Req Delivery: (no value)'. Below this is a section for 'Supplier / Line Item Details' for 'Fisher Scientific'. A table lists a product with the following details:

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Media, Microbiological, MF-Endo broth, Target organisms: total coliforms, 2mL plastic ampule, Positive control test organism(s): E. coli/P. aeruginosa/P. vulgaris, Sterile, Premeasured 50/PK	097332	50/PK	9.99	1 PK	9.99 USD

Below the table, there are 'Ship To (same as header)' and 'Delivery Options (same as header)' fields, both with 'edit' buttons. A yellow arrow points to the 'Ship To (same as header)' field.

Figure 26

- Once you have completed the **Shipping Address, Attn, Room and Dept** fields
- Click on **Save** and proceed to *Step 5 Section I. c)* to select delivery options.

The screenshot shows a 'Ship To' dialog box. It contains the following text: 'Complete the fields below to enter your shipping address for this order. If you need to make a change, select a different address from the available options.' Below this is a 'Shipping address' field with a dropdown menu showing 'West Receiving Dock'. A link 'To choose a different address, click here' is provided. The 'Address Details' section is highlighted in yellow and contains the following fields: Attn: HuskyBuy Training, Room: 1234, Dept: Purchasing Services, Address Line 1: W Recv Dock, Address Line 2: 263 Farmington Ave, City: Farmington, State: CT, Zip Code: 06030, Country: United States. At the bottom, there are 'Save' and 'Cancel' buttons, with a yellow arrow pointing to the 'Save' button.

Figure 27

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c) Under the **Shipping** section click on **edit** next to **Delivery Options**.

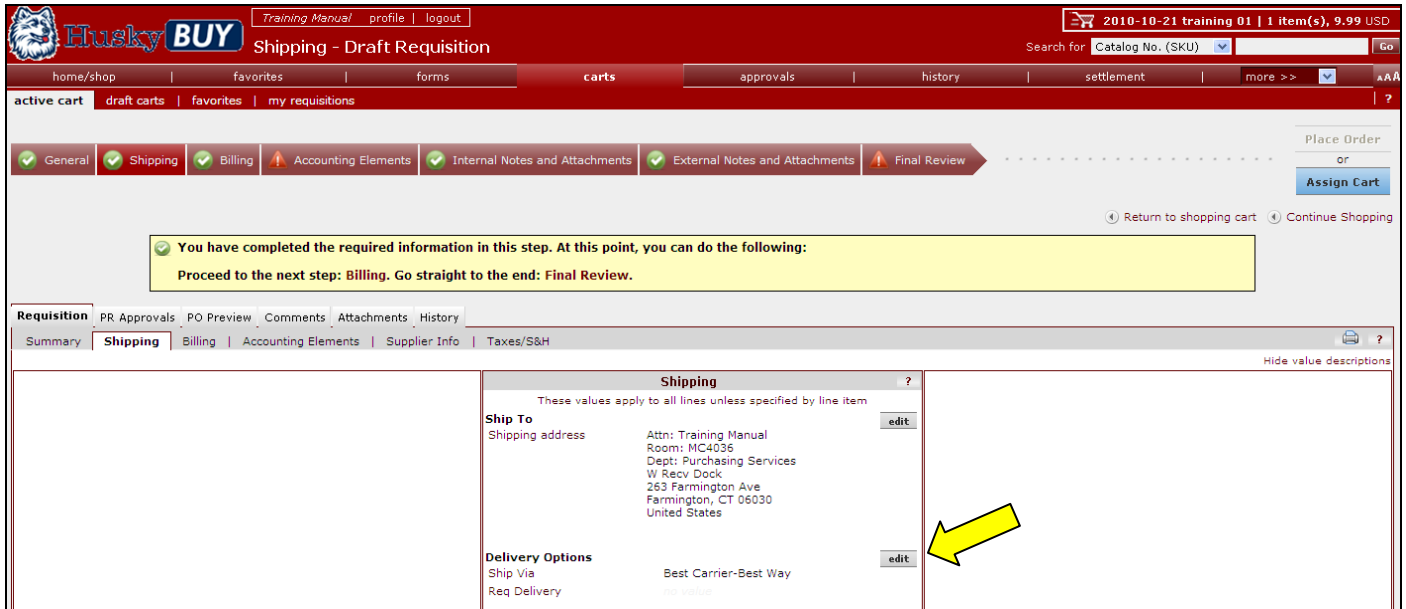


Figure 28

- **Ship Via** – click on the drop-down arrow to select from a list of shipping methods. If you do not see the shipping method you are looking for, please contact the HuskyBuy Help Desk to have the shipping method added to the pull down list for your profile.
- **Req Delivery** – this is an optional field used to indicate a requested delivery date to be sent to the Supplier.
- Click on **Save**.

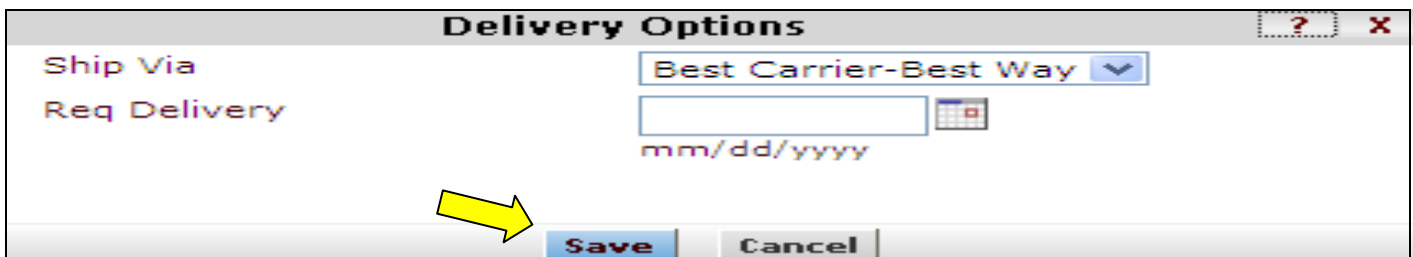


Figure 29

## STEP 6: ACCOUNTING ELEMENTS

Accounting elements are required fields. The add split option allows you to split the purchase between a variety of accounts by price percentage, quantity percentage or price amount. You have the option to recalculate your values as well as viewing monetary calculations. If your role is a Shopper and you are unsure what to complete in this section you can assign your cart to a Requisitioner or Approver and he/she will complete this section once they are ready to submit the purchase requisition.

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- Click on the **Requisition** and **Accounting Elements** sub-tabs.
- Under the **Accounting Elements** section click on **edit**.

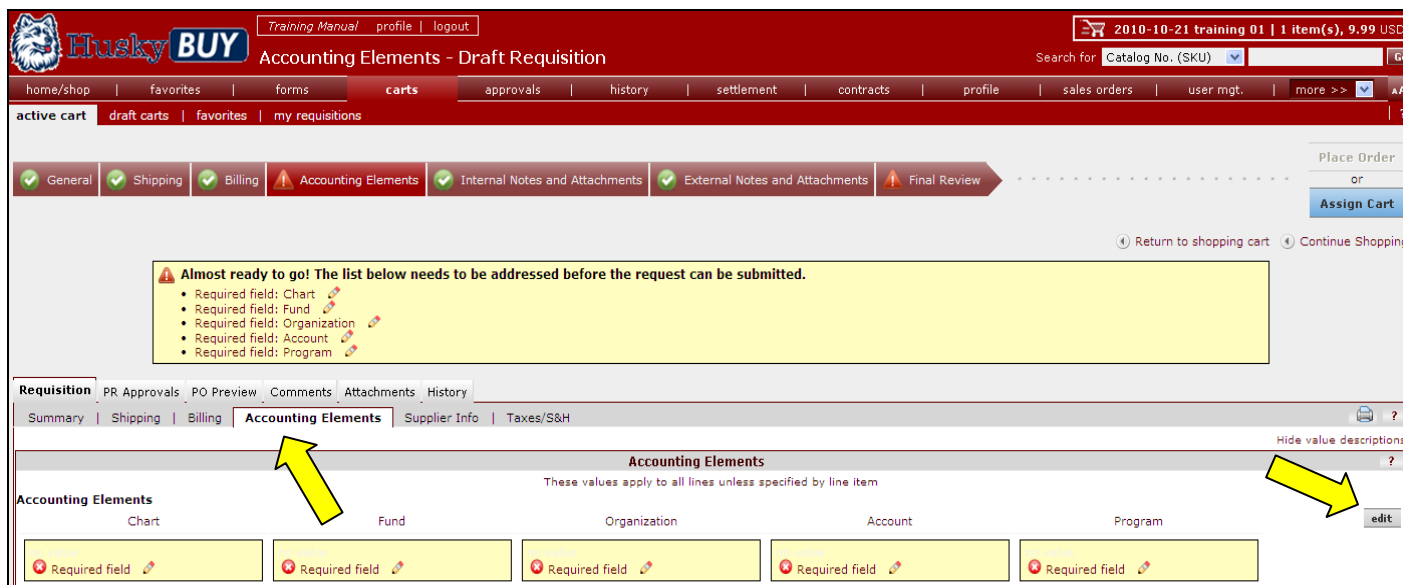


Figure 30

I. Will your entire shopping cart have the same accounting elements?

**YES,**  
 Proceed to I. a)

**NO,**  
 Proceed to I. b)

a) Under the **Accounting Elements** section complete all required fields.

- **Chart** - click on **Select from all values** and select a chart from the drop-down list.
- **Fund** – enter the fund.
- **Organization** – enter the organization.
- **Account** – enter the account.
- **Program** - click on **Select from all values** and select a program from the drop-down list.

**NOTE:** If you are unsure what the fund, organization and/or account is, click on Select from all values and click on search. Then click on select next to the correct value.

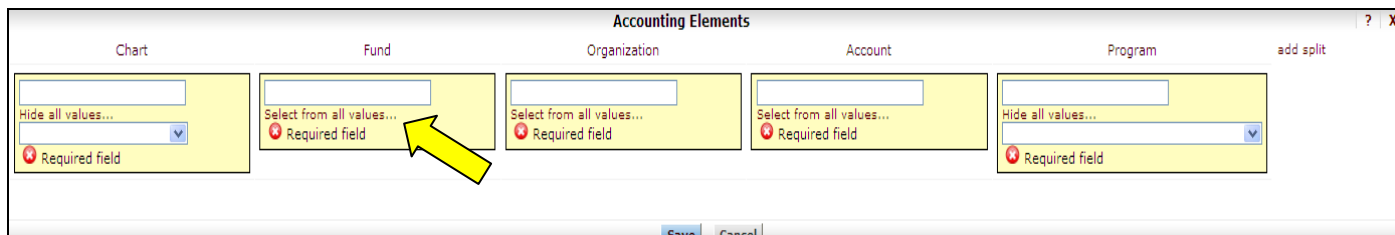


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Figure 32

Value	Description	
100000	Direct Education	select
110000	Indirect Education	select
120000	General Fund Block Grant Support	select
120001	General Fund-Univ Medical Group	select
120002	Strategic Plan - School of Medicine	select
120003	General Fund Salary Support - Burg	select
120004	School of Medicine General Fund Sup	select
120005	School of Dental Medicine General F	select
120006	Payroll Clearing Fund	select
120007	SALARY EXPENSES UMG HEALTH SYSTEM D	select
130000	Transition	select
130001	Excellence	select
135001	Excellence	select
140000	Ahec-Bridgeport (Other Expense)	select
200000	Osteoporosis Research	select

Figure 33

- Click on **Save** and proceed to *Step 7: Adding Notes* to continue.

Figure 34

- b) Under the **Accounting Elements** section click on **add split** for each account you want to split.
- Complete the **Chart, Fund, Organization, Account** and **Program** fields for each account you want to split.
  - Click on the drop-down arrow to select a split type.
  - Enter the values for each account based on the split type.
  - Click on recalculate / validate values.
  - Click on **Save** and proceed to *Step 7: Adding Notes* to continue.

**NOTE:** If your total split percentages for all accounts do not total 100% you will receive an error message. If your total split price amounts for all accounts do not equal to the document subtotal you will receive an error message.

Figure 35

## STEP 7: ADDING NOTES

Users have the ability to add a detailed note to the requisition that is available to Approvers as the requisition goes through workflow. Internal notes are not sent to Suppliers. If your role is a Shopper and you are unsure what to complete in this section you can assign your cart to a Requisitioner or Approver and he/she will complete this section once they are ready to submit the purchase requisition.

- Click on the **Requisition** and **Summary** sub-tabs.
- Under the **Internal Notes and Attachments** section click on **edit**.

Figure 36

Figure 37

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- **Internal Note** – this is an optional field in which you can enter a note to be viewed internally.
- **Internal Distribution Only** – click the check box only if you do not want to send your purchase request to the Supplier. This option is used to request a purchase order number for payment purposes only.
- Click on **Save**.

**NOTE:** The Internal Distribution Only option is used for payment purposes only such as no charge purchase orders.

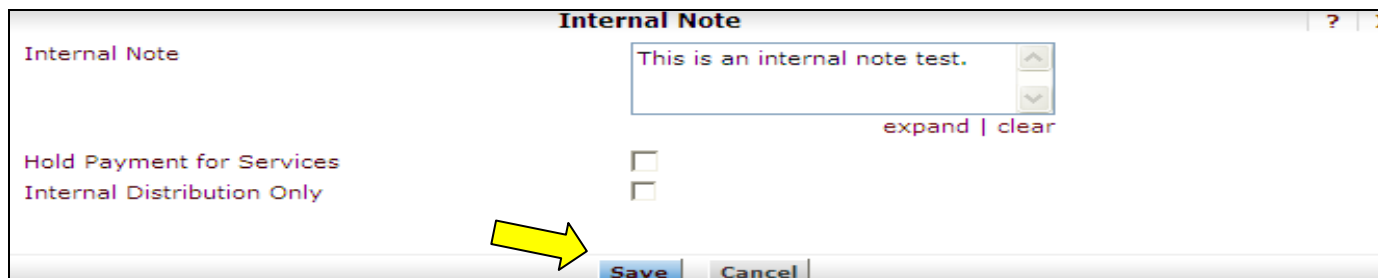


Figure 38

## STEP 8: ADDING ATTACHMENTS

Users have the ability to attach files in various formats or links to websites. These are available to Approvers as the requisition goes through workflow. Internal attachments are not sent to Suppliers. If your role is a Shopper and you are unsure what to complete in this section you can assign your cart to a Requisitioner or Approver and he/she will complete this section once they are ready to submit the purchase requisition.

**NOTE:** Attachments cannot be added once the purchase request has completed workflow.

- Click on the **Requisition** and **Summary** sub-tabs.
- Under the **Internal Notes and Attachments** section click on **add attachment**.

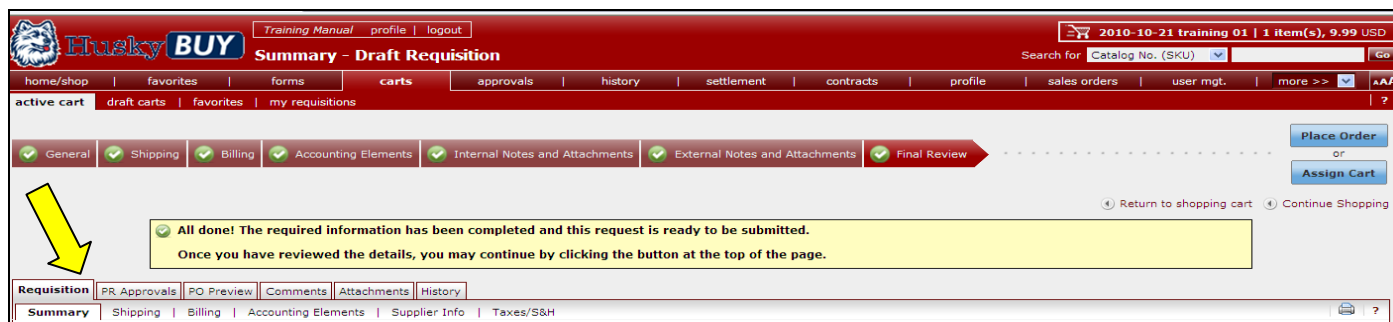


Figure 39

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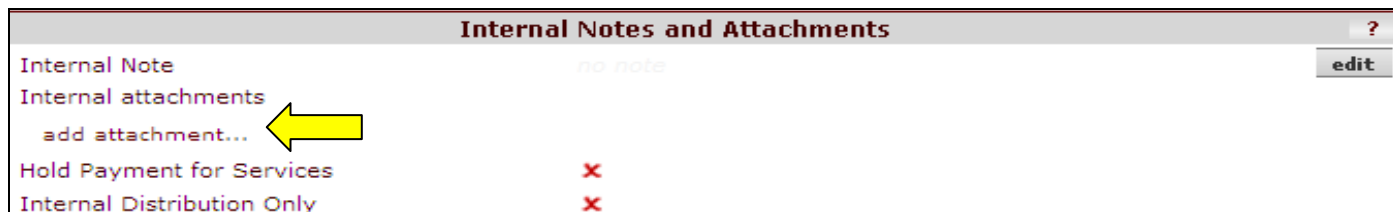


Figure 40

## WEBSITE LINKS:

- **Attachment Type** – click on the drop-down arrow and select Link/URL.
- **File/URL Name** – enter the name of the website.
- **Link/URL** – enter the website address.
- Click on **Save**.

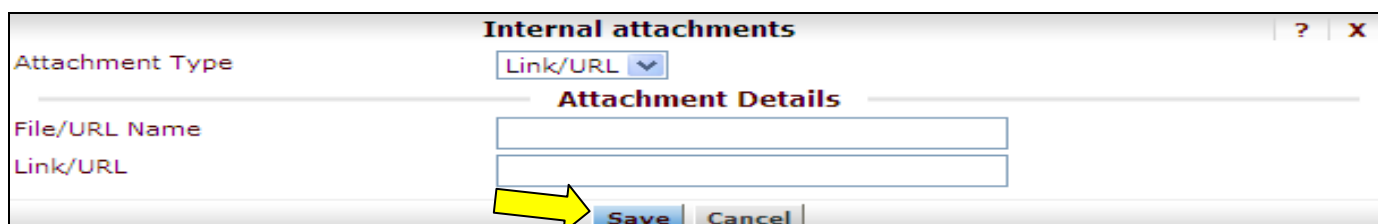


Figure 41

## FILES:

- Save the document to your computer.
- **Attachment Type** – click on the drop-down arrow and select file.
- **File Name** – enter the name of the file.
- **File** – click on **Browse** and attach the document that was saved on your computer.
- Click on **Save**.

**NOTE:** Below are a few examples of adding an internal attachment.

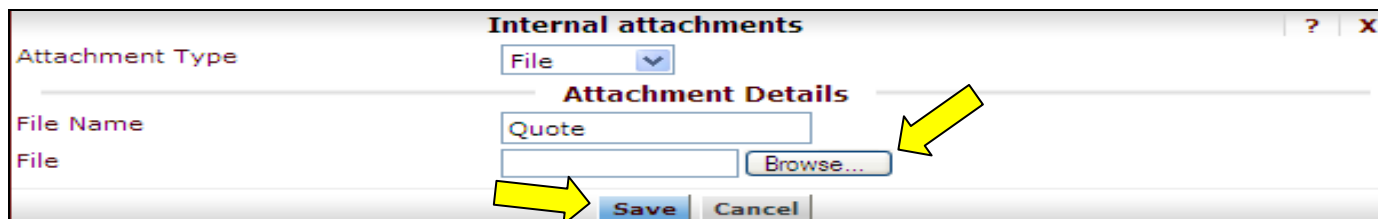


Figure 42

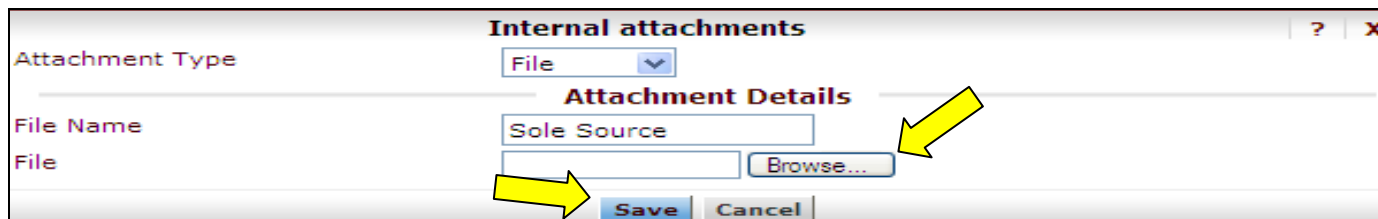


Figure 43

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## STEP 9: SUPPLIER / LINE ITEM DETAILS

The Supplier/Line Item Details section allows you to make changes to each line item if needed. If your role is a Shopper and you are unsure what to complete in this section you can assign your cart to a Requisitioner or Approver and he/she will complete this section once they are ready to submit the purchase requisition.

I. Is your purchase request related to a quote you received?



a) Click on the **Requisition** and **Supplier Info** sub-tabs.

- Click on the **Supplier Line/Item Details** section.
- Click on **edit** next to "To Be Assigned" and a pop-up box will appear.

**NOTE:** You must remember to attach your quote to your order. View *Step 8: Adding Attachments* for instructions on how to attach a quote.

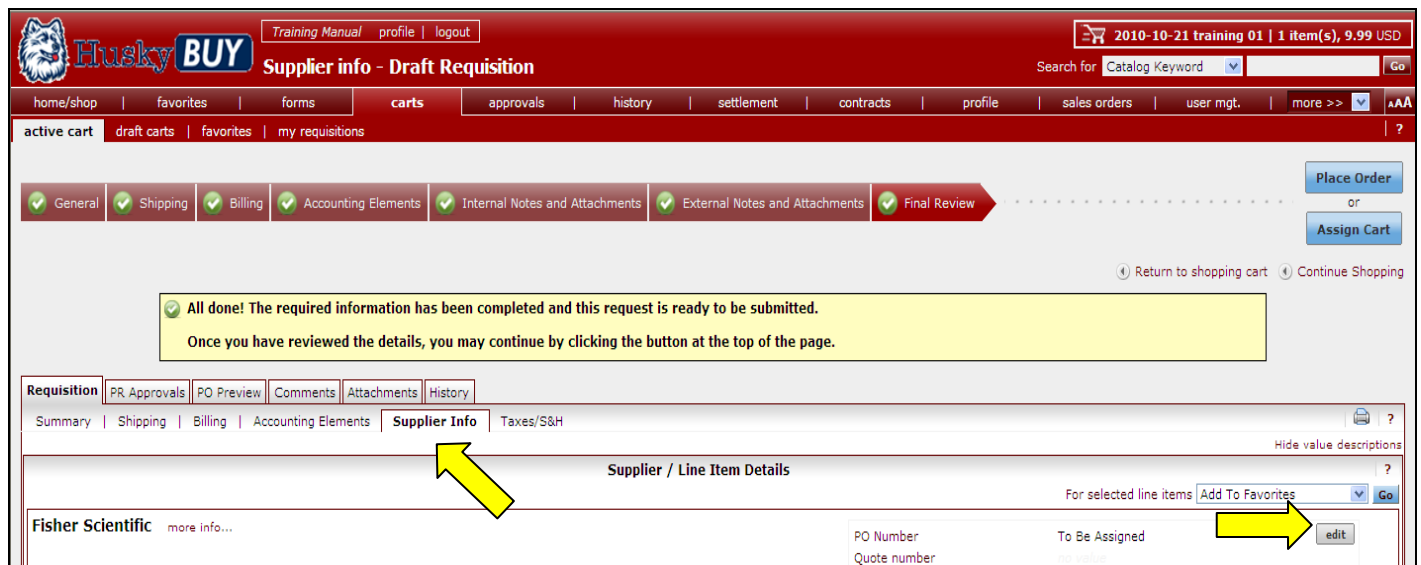
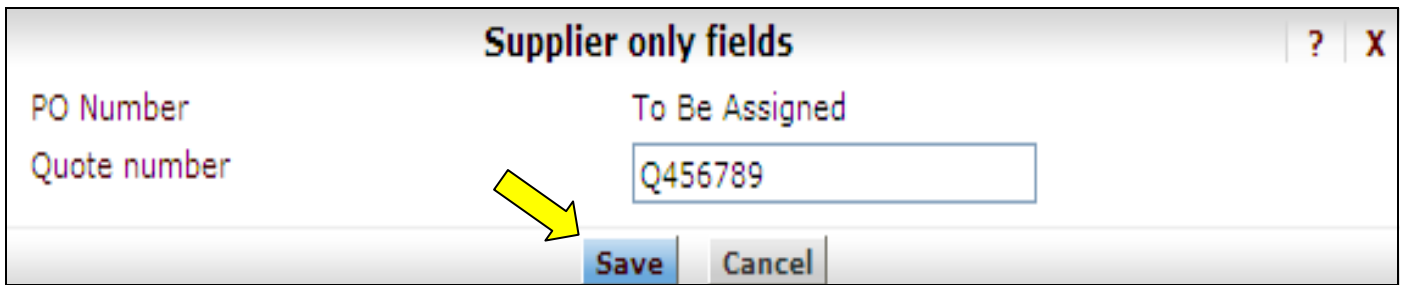


Figure 44

- **Quote number** – enter in the quote number provided by the Supplier.
- Click on **Save** and proceed to *Procedure #2010-P3 How To Assign An Active Shopping Cart* for further instructions to assign your shopping cart or proceed to *Procedure #2010-P8 How To Submit Your Purchase Requisition* for further instructions to place your order.



Supplier only fields

PO Number

Quote number

To Be Assigned

Q456789

Save Cancel

Figure 45

- b) Proceed to *Procedure #2010-P3 How To Assign An Active Shopping Cart* for further instructions to assign your shopping cart or proceed to *Procedure #2010-P8 How To Submit Your Purchase Requisition* for further instructions to place your order.