



University of Connecticut Health Center HuskyBuy Training Manual

PROCEDURE NUMBER: 2010-P6

HOW TO PURCHASE FROM A NON-CATALOG SUPPLIER

OVERVIEW:

A Non-Catalog Supplier is a Supplier who does not have a price list of their products and/or services available through HuskyBuy.

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.

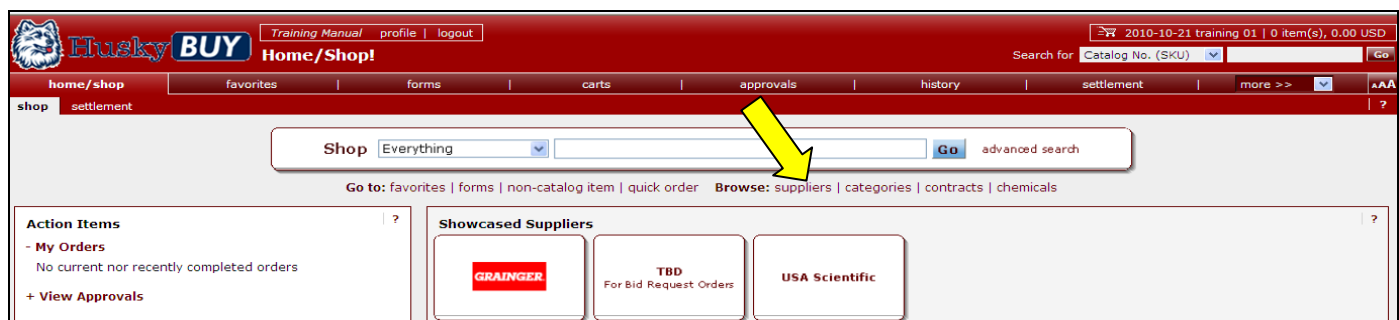


Figure 1

These materials are Proprietary and Confidential to the Purchasing Services Department at the University of CT Health Center. Any re-publication, transmission or distribution of these materials without the express written consent of the Purchasing Services Department is strictly prohibited.

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

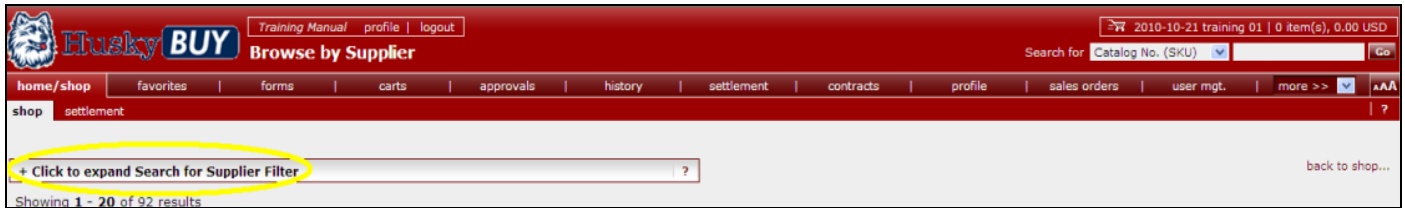


Figure 2

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

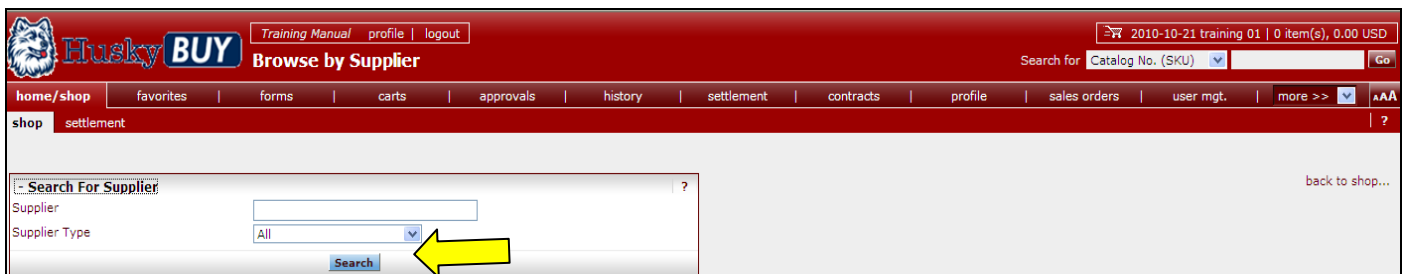


Figure 3

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

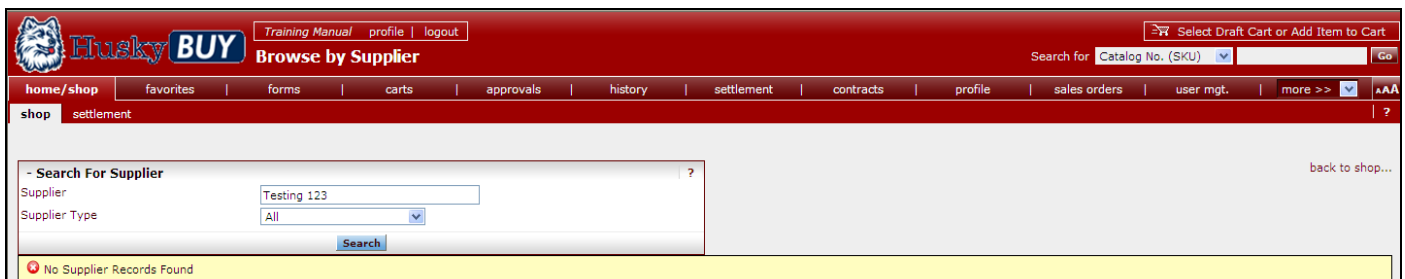





Figure 4

- If the Supplier has a hosted catalog icon  and/or a punch-out catalog icon , proceed to *Procedure #2010-P5 How To Purchase From A Catalog Supplier* for further instructions.
- If the Supplier has a non-catalog icon , proceed to *Step 3: Adding A Non-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.

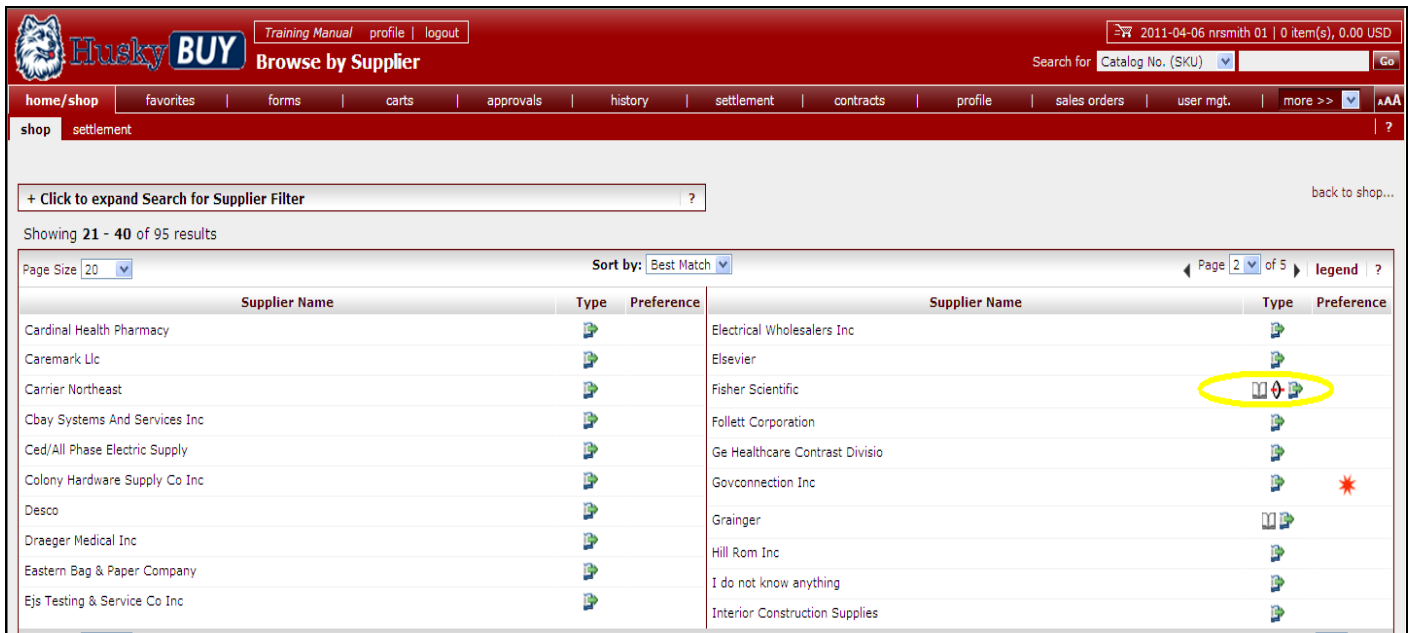


Figure 5

STEP 2: SEARCHING FOR A PRODUCT

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**. 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.

QUICK ORDER:

- Select the **home/shop** navigation tab.
- Select the **shop** on sub-tab.
- Click on **quick order** adjacent to the word **Go to:** on the home page.

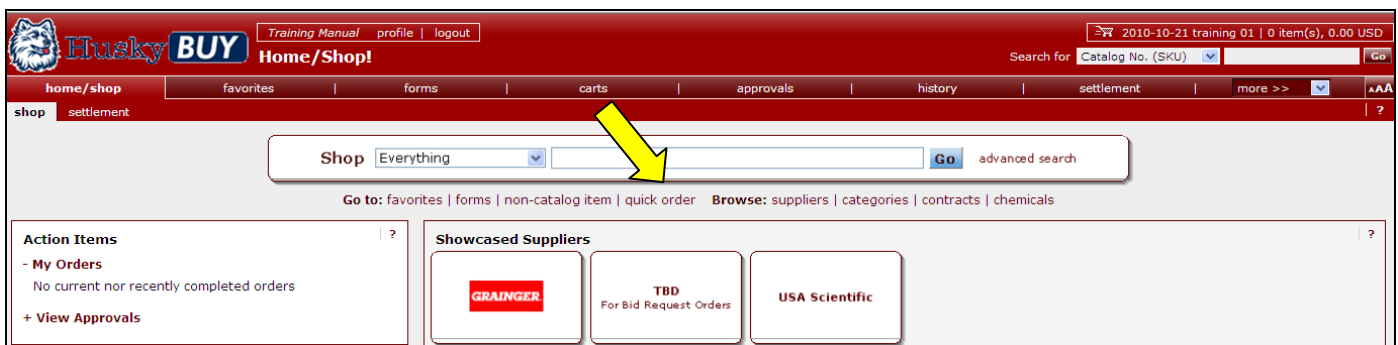


Figure 6

These materials are Proprietary and Confidential to the Purchasing Services Department at the University of CT Health Center. Any re-publication, transmission or distribution of these materials without the express written consent of the Purchasing Services Department is strictly prohibited.

- **Category** – click on the drop-down arrow to select a category type.
- **Part Number (SKU)** – enter in the part number of the product you want to purchase.
- Click on **Add to Active Cart**.

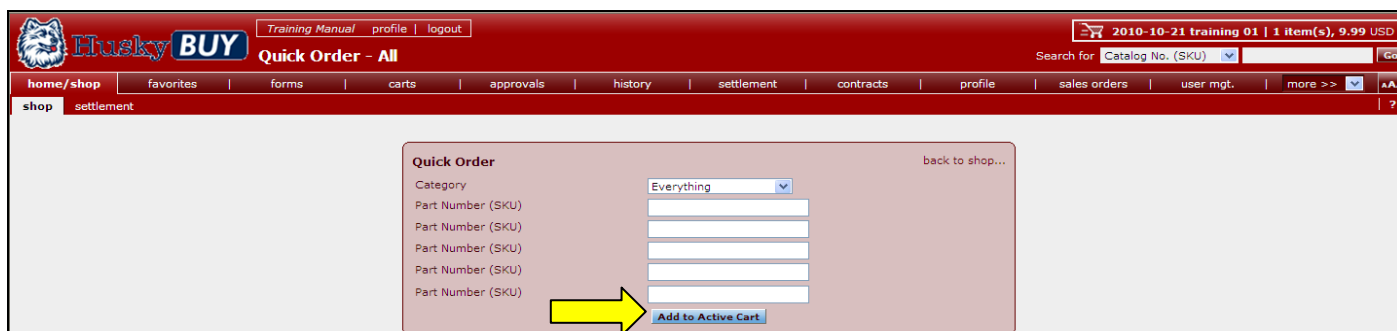


Figure 7

- If you received the following message: "The item was successfully added to your cart", proceed to *Procedure #2010-P5 How To Purchase From A Catalog Supplier* for further instructions.

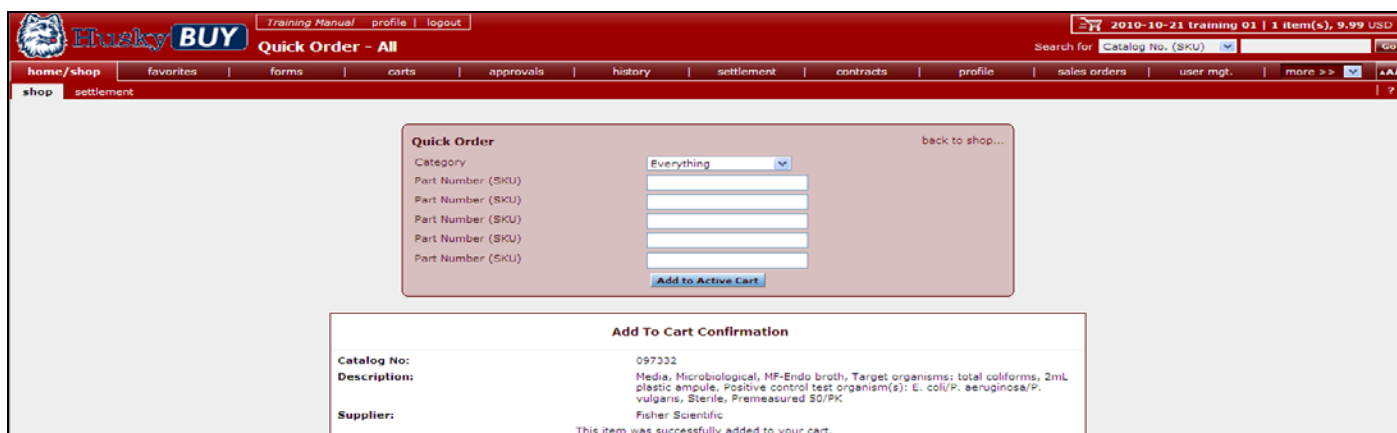


Figure 8

- 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 9

These materials are Proprietary and Confidential to the Purchasing Services Department at the University of CT Health Center. Any re-publication, transmission or distribution of these materials without the express written consent of the Purchasing Services Department is strictly prohibited.

SIMPLE SEARCH:

- Select the **home/shop** navigation tab.
- Select the **shop** sub-tab.
- 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.
- Type what it is you are searching for in the window.
- Click on **Go**.
- If you located the product within your search results, proceed to *Procedure #2010-P5 How To Purchase From A Catalog Supplier* for further instructions.

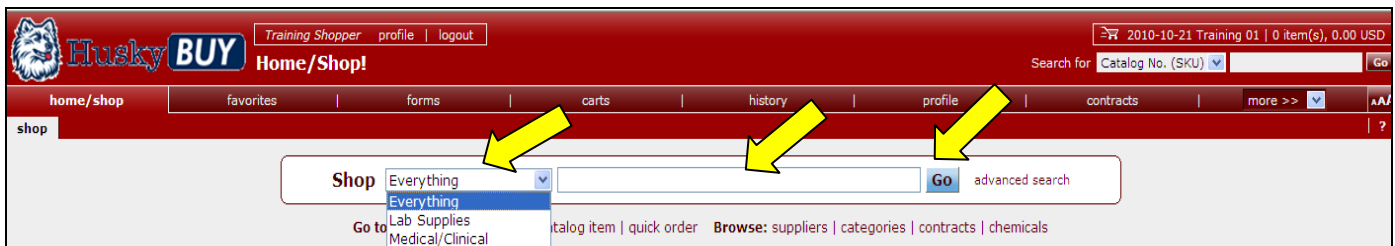


Figure 10

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

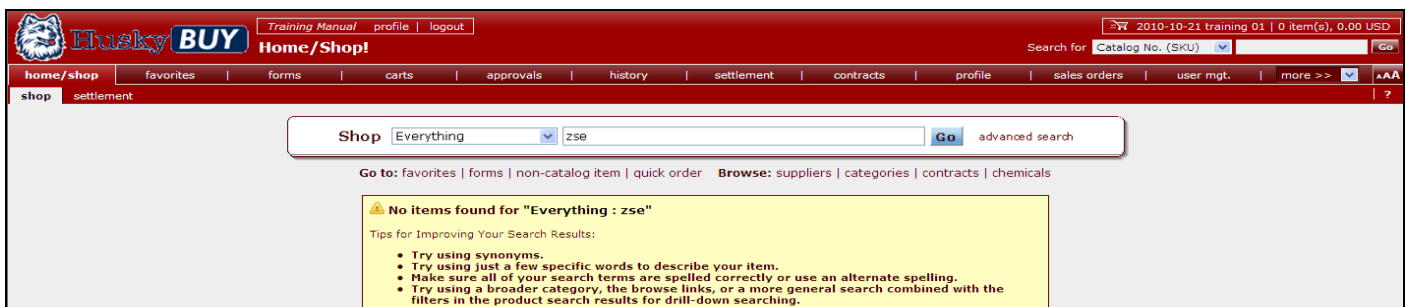


Figure 11

QUICK SEARCH:

- The quick search is located at the top right hand corner of HuskyBuy.
- **Search for** – click on the drop-down arrow to select a search option.
- Type what it is you are searching for in the window.
- Click on **Go**.
- If you located the product within your search results, proceed to *Procedure #2010-P5 How To Purchase From A Catalog Supplier* for further instructions.



Figure 12

These materials are Proprietary and Confidential to the Purchasing Services Department at the University of CT Health Center. Any re-publication, transmission or distribution of these materials without the express written consent of the Purchasing Services Department is strictly prohibited.

- If you did not receive any search results you will receive the following message:
“No Items found for _____”.

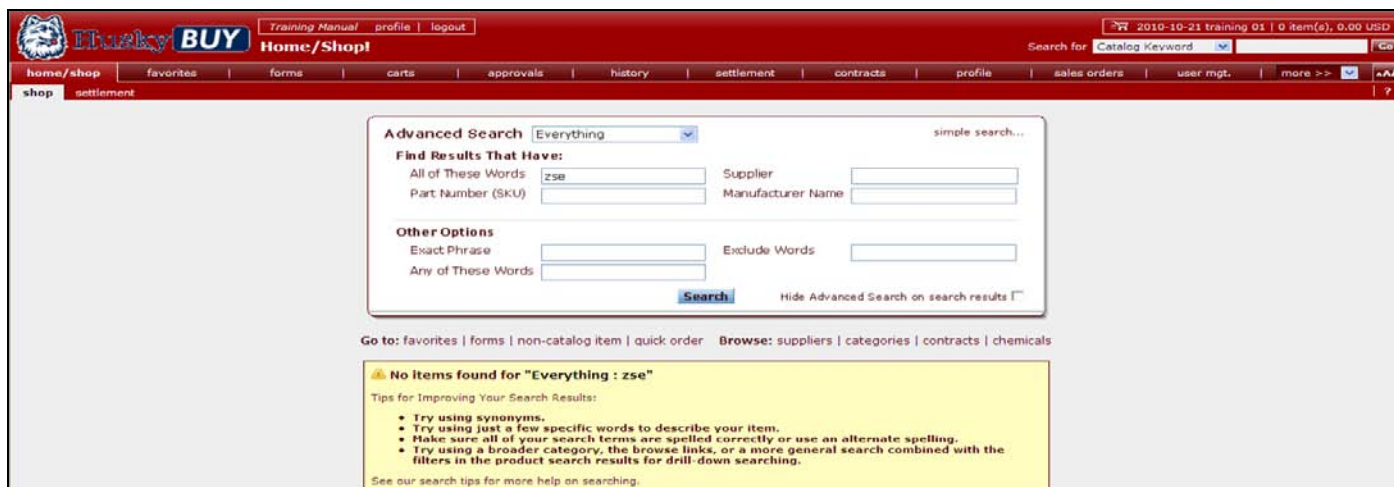


Figure 13

ADVANCED SEARCH:

- Select the **home/shop** navigation tab.
- Select the **shop** sub-tab.
- Click on **advanced search**.

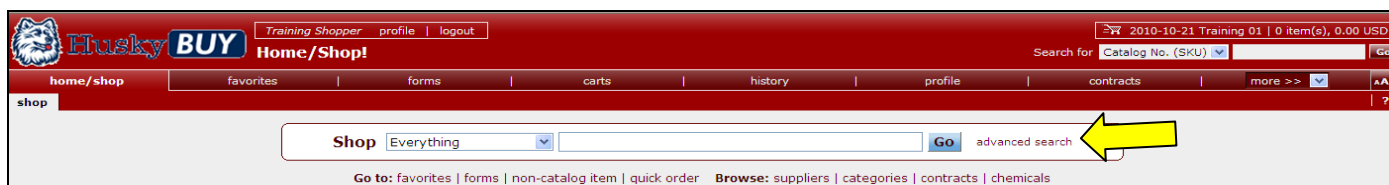


Figure 14

- **Advanced Search** – click on the drop-down arrow to select a product vertical.
- Type what it is you are searching for in any of the search option windows.
- Click on **Search**.
- If you located the product within your search results, proceed to *Procedure #2010-P5 How To Purchase From A Catalog Supplier* for further instructions.

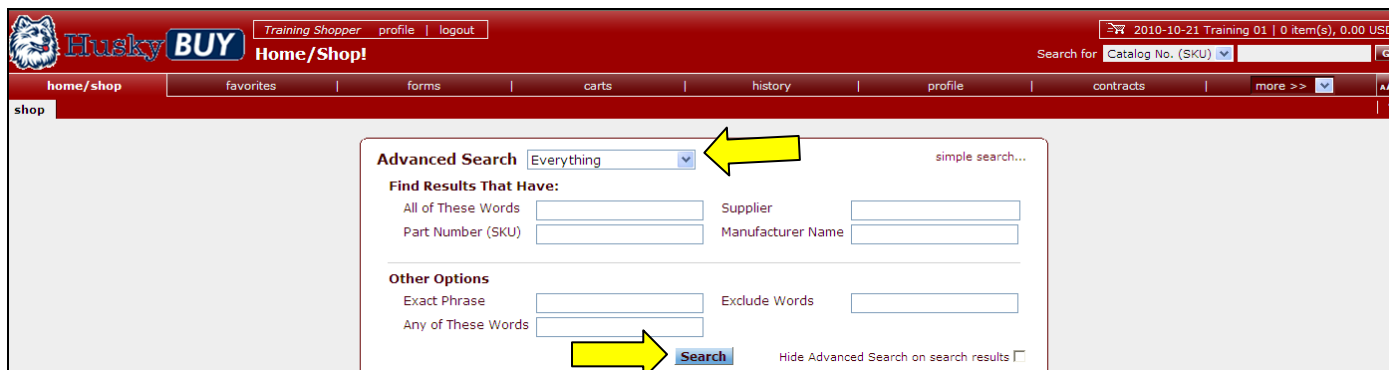


Figure 15

These materials are Proprietary and Confidential to the Purchasing Services Department at the University of CT Health Center. Any re-publication, transmission or distribution of these materials without the express written consent of the Purchasing Services Department is strictly prohibited.


- If you did not receive any search results you will receive the following message:
“No Items found for _____”.



Figure 16

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 NON-CATALOG PRODUCT TO YOUR SHOPPING CART

- Once you have found the non-catalog Supplier, click on the non-catalog supplier icon  and a pop-up box will appear.
- If the Supplier has multiple addresses you must click on **select different fulfillment center** to view the list of addresses.
- If the Supplier has only one address you will not see the select different fulfillment center option.

NOTE: Some Suppliers offer products and/or services through separate divisions that are not located at the main corporate address. It is very important that you select the correct address for your order.

Figure 17

- A pop-up box will appear displaying a list of additional addresses for that Supplier.
- Click on **Select** next to the correct address.

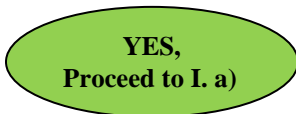
NOTE: If you are unsure what address to select, exit out of the address list to keep the preferred address that was provided for you.

Figure 18

- **Product Description** – enter detailed information about the product or service. This can include the product name and a description of the product. Include any information that would be relevant to the Supplier.
- **Catalog No.** – enter the catalog number (SKU) of the required item. If you do not know the catalog number, enter "Unknown"
- **Quantity** – enter the required quantity for the product described.
- **Price Estimate** – enter the estimated or actual price associated with the product described.
- **Packaging** – click on the drop-down arrow to select a unit of measure. Packaging is broken up into two components: Packaging UOM and UOM dimension.

NOTE: If this purchase request is a standing order you must enter the maximum cost of the service (i.e. construction project, advertising) in the price estimate field for the full fiscal year. View audio visual *Lesson #13 Standing Order Process* for additional information.

I. Would you like to purchase additional items from this Supplier?



a) Click on **Save and Add Another** only if you need an additional line item.

Non-Catalog Item ? X

3m Company select different supplier

Fulfillment Address BU Corporate 1: (preferred)
 GENERAL OFFICES/3M CENTER
 ST. PAUL, MN 55144 US
select different fulfillment center

+ Show distribution methods

Product Description	Catalog No.	Quantity	Price Estimate	Packaging
Pants <small>249 characters remaining</small> <small>expand clear</small>	888888	1	4.97	EA

+ Show product details

Save and Close **Save and Add Another** **Close**

Figure 19

- Complete the **Product Description, Catalog No., Quantity, Price Estimate** and **Packaging** fields for each additional line item.
- Click on **Save and Close** and proceed to *Step 4: General Information* to continue.

Non-Catalog Item ? X

Recently added items:

Supplier Name	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity
3m Company	Pants	888888	EA	4.97 USD	1 EA

3m Company select different supplier

Fulfillment Address BU Corporate 1: (preferred)
 GENERAL OFFICES/3M CENTER
 ST. PAUL, MN 55144 US
select different fulfillment center

+ Show distribution methods

Product Description	Catalog No.	Quantity	Price Estimate	Packaging
Hats <small>250 characters remaining</small> <small>expand clear</small>	777777	1	5.02	EA

+ Show product details

Save and Close **Save and Add Another** **Close**

Figure 20

These materials are Proprietary and Confidential to the Purchasing Services Department at the University of CT Health Center. Any re-publication, transmission or distribution of these materials without the express written consent of the Purchasing Services Department is strictly prohibited.

b) Click on **Save and Close**.

Non-Catalog Item ? X

3m Company *select different supplier*

Fulfillment Address BU Corporate 1: (preferred)
GENERAL OFFICES/3M CENTER
ST. PAUL, MN 55144 US
select different fulfillment center

+ Show distribution methods

Product Description	Catalog No.	Quantity	Price Estimate	Packaging
Gloves	123456	1	9.99	EA

248 characters remaining *expand | clear*

+ Show product details

Save and Close Save and Add Another Close

Figure 21

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**.

Husky BUY Training Manual profile | logout

2010-10-21 training 01 | 1 item(s), 9.99 USD

Search for Catalog No. (SKU) Go

home/shop | favorites | forms | **carts** | approvals | history | settlement | more >> AAA

active cart | draft carts | favorites | my requisitions

Shopping Cart for Training Manual

Name this cart: 2010-10-21 training 01

Continue Shopping

1 Item(s) for a total of **9.99** USD
subtotal: 9.99 USD
estimated tax, shipping & handling: 0.00 USD

Proceed to Checkout or Assign Cart

Figure 22

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

Figure 23

- **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 purchase, be sure to select an urgent priority.

Figure 24

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 25

These materials are Proprietary and Confidential to the Purchasing Services Department at the University of CT Health Center. Any re-publication, transmission or distribution of these materials without the express written consent of the Purchasing Services Department is strictly prohibited.

- **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.

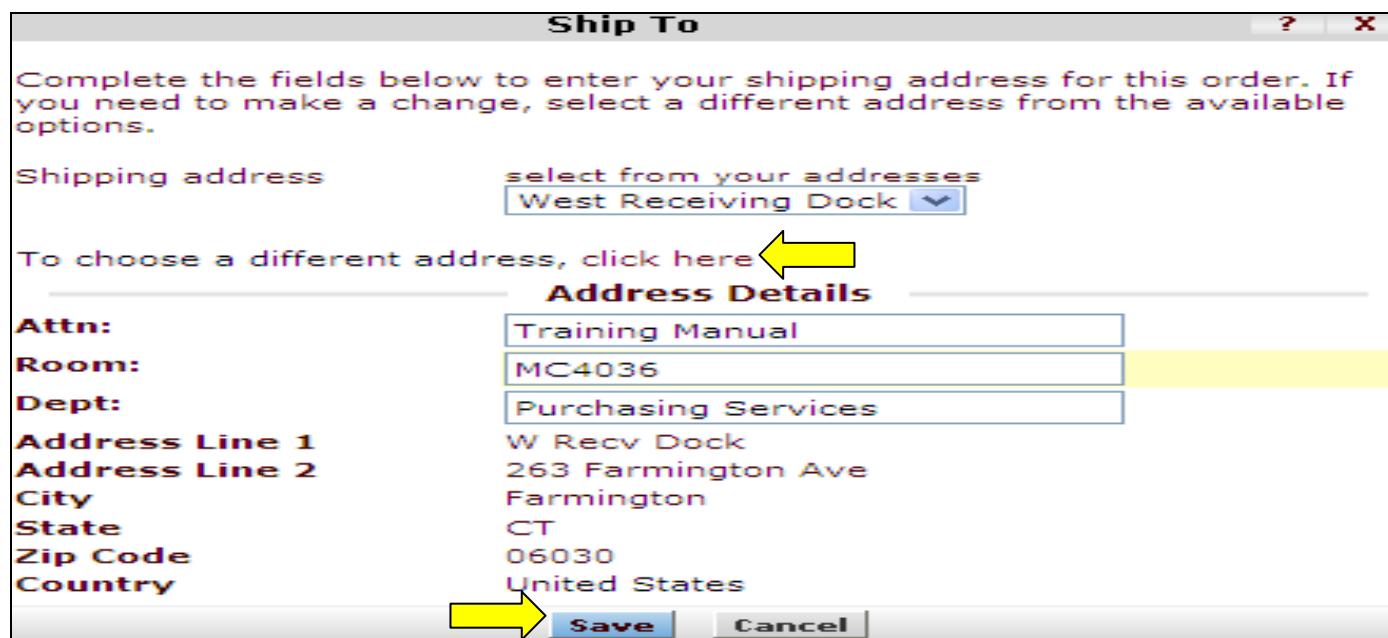


Figure 26

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.

Requisition | PR Approvals | PO Preview | Comments | Attachments | History

Summary | **Shipping** | Billing | Accounting Elements | Supplier Info | Taxes/S&H

Shipping ?

These values apply to all lines unless specified by line item

Ship To

Shipping address Attn: Training Manual
 Room: MC4036
 Dept: Purchasing Services
 W Recv Dock
 263 Farmington Ave
 Farmington, CT 06030
 United States

Delivery Options

Ship Via Best Carrier-Best Way
 Req Delivery no value

Supplier / Line Item Details ?

For selected line items

3m Company [more info...](#)
 BU Corporate 1
 General Offices/3m Center, St. Paul, MN 55144 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Gloves more info...	123456	EA	9.99	1 EA	9.99 USD

Ship To (same as header) ←

Delivery Options (same as header)

Figure 27

- 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.

Ship To ? X

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.

Shipping address [select from your addresses](#)
 West Receiving Dock ▼

To choose a different address, click here

Address Details

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

Figure 28

These materials are Proprietary and Confidential to the Purchasing Services Department at the University of CT Health Center. Any re-publication, transmission or distribution of these materials without the express written consent of the Purchasing Services Department is strictly prohibited.

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

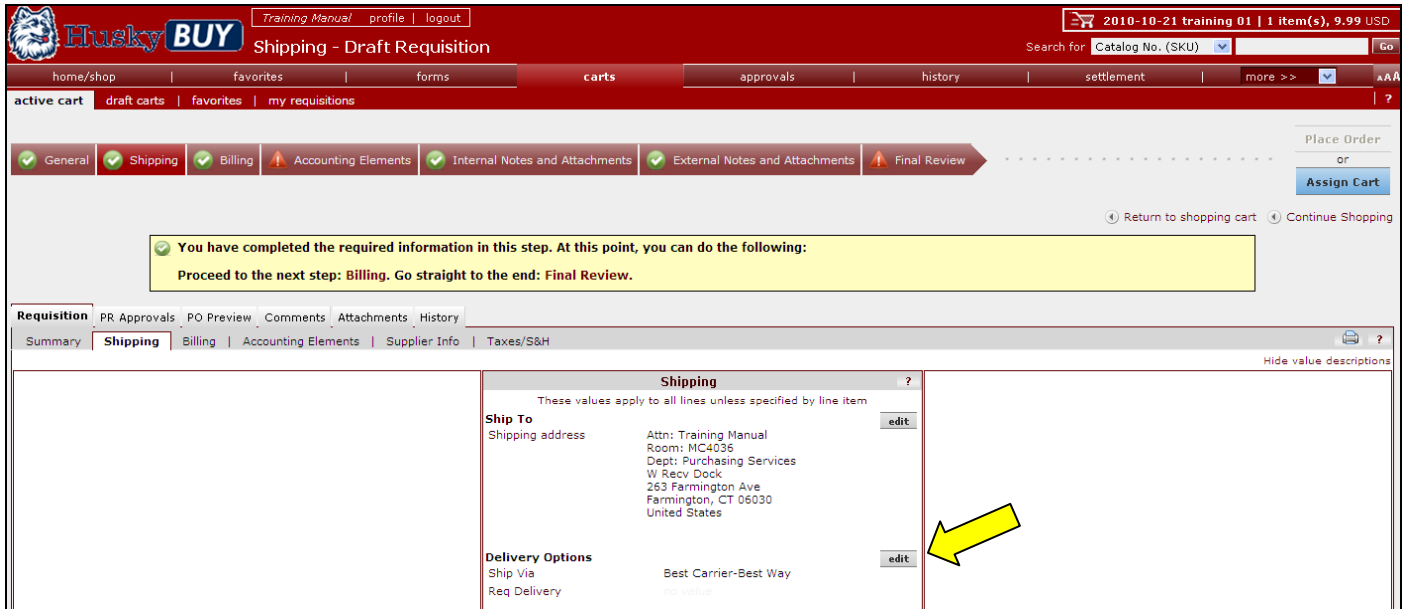


Figure 29

- **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**.

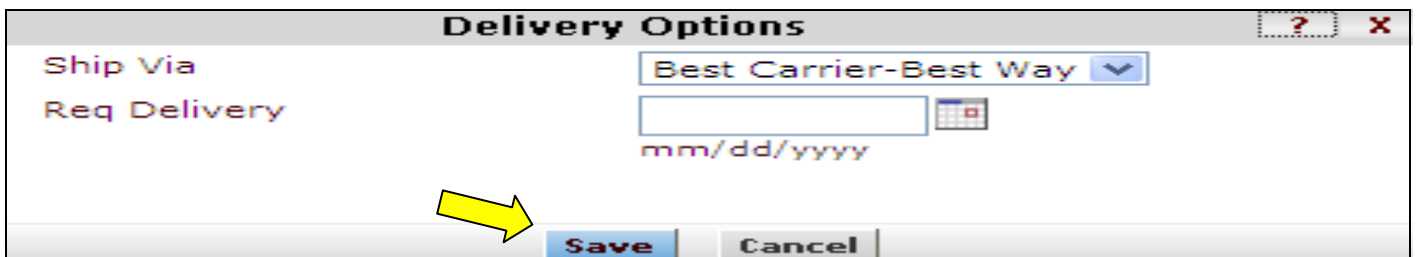


Figure 30

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.

These materials are Proprietary and Confidential to the Purchasing Services Department at the University of CT Health Center. Any re-publication, transmission or distribution of these materials without the express written consent of the Purchasing Services Department is strictly prohibited.

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

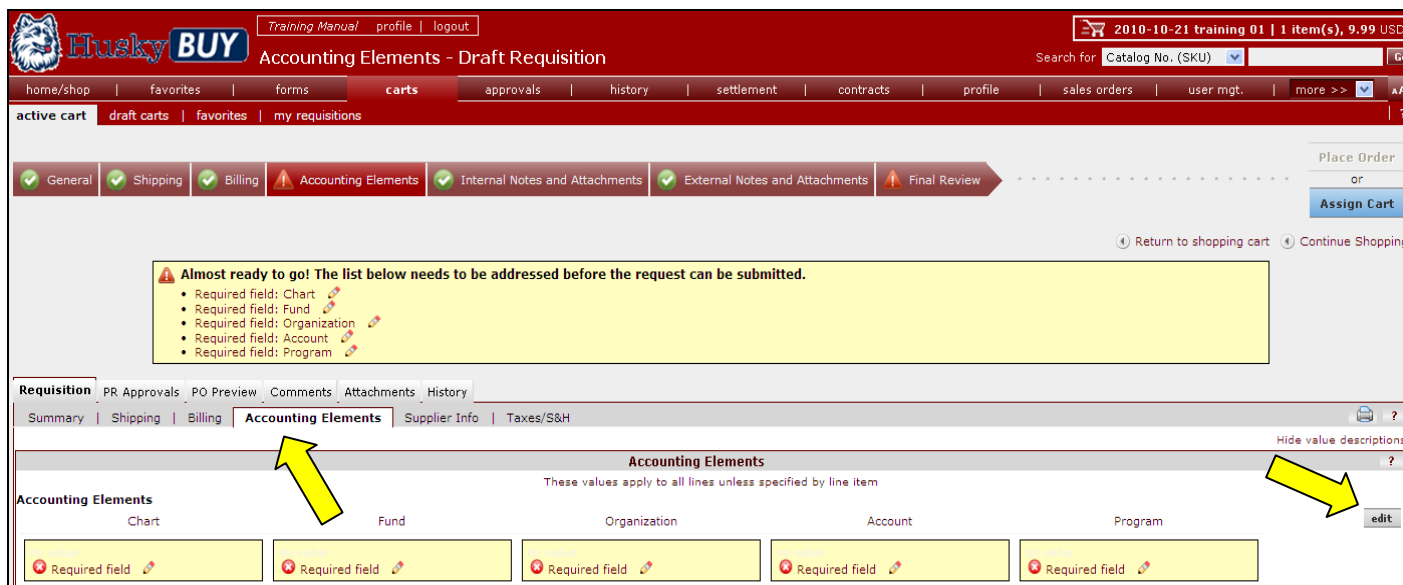


Figure 31

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



- 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.

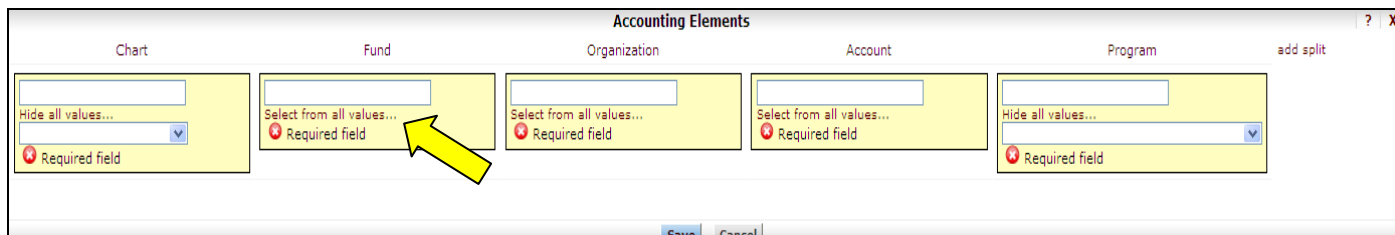


Figure 32

These materials are Proprietary and Confidential to the Purchasing Services Department at the University of CT Health Center. Any re-publication, transmission or distribution of these materials without the express written consent of the Purchasing Services Department is strictly prohibited.

Figure 33

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 34

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

Figure 35

- 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 36

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 37

Figure 38

These materials are Proprietary and Confidential to the Purchasing Services Department at the University of CT Health Center. Any re-publication, transmission or distribution of these materials without the express written consent of the Purchasing Services Department is strictly prohibited.

- **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.

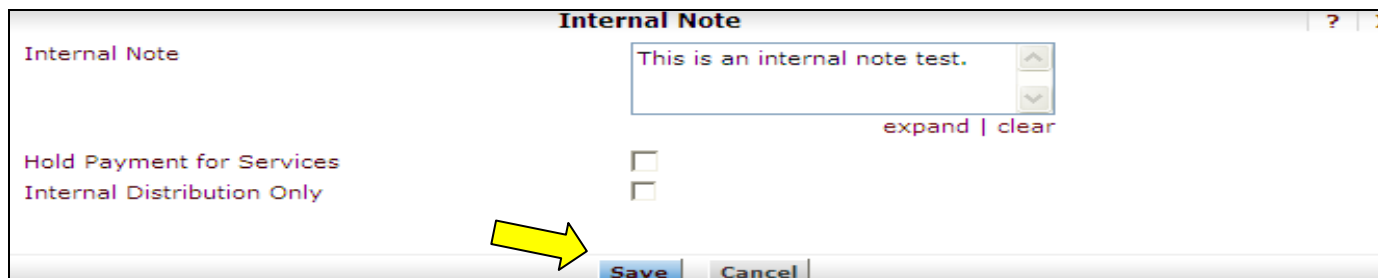


Figure 39

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**.

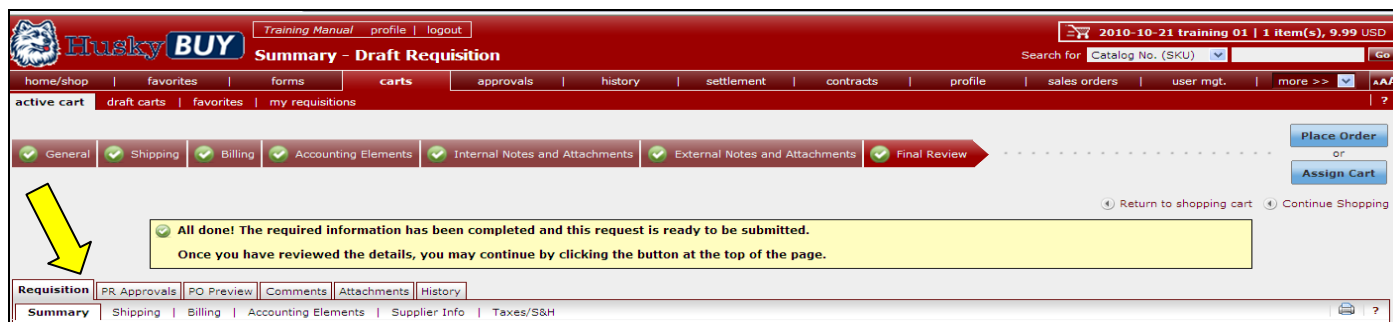


Figure 40

These materials are Proprietary and Confidential to the Purchasing Services Department at the University of CT Health Center. Any re-publication, transmission or distribution of these materials without the express written consent of the Purchasing Services Department is strictly prohibited.

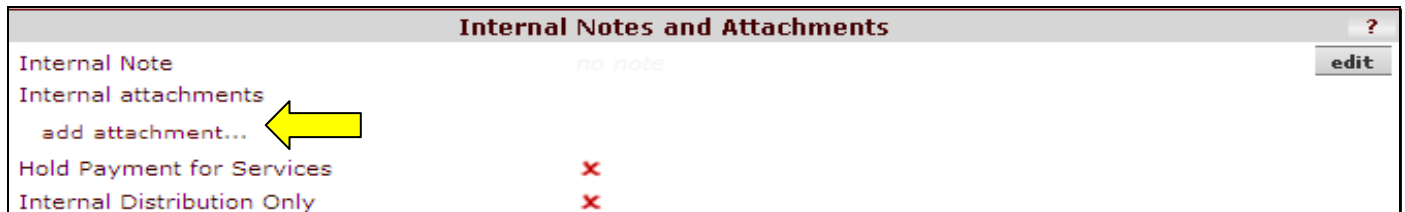


Figure 41

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**.

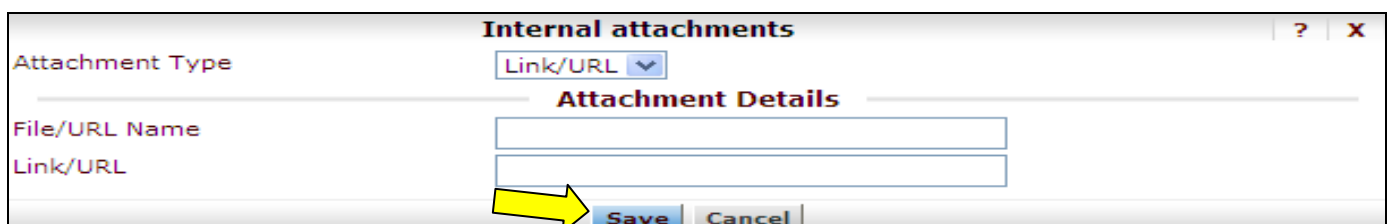


Figure 42

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.

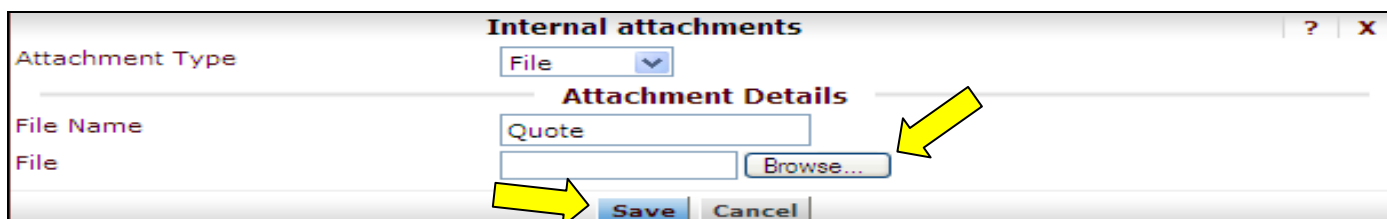


Figure 43

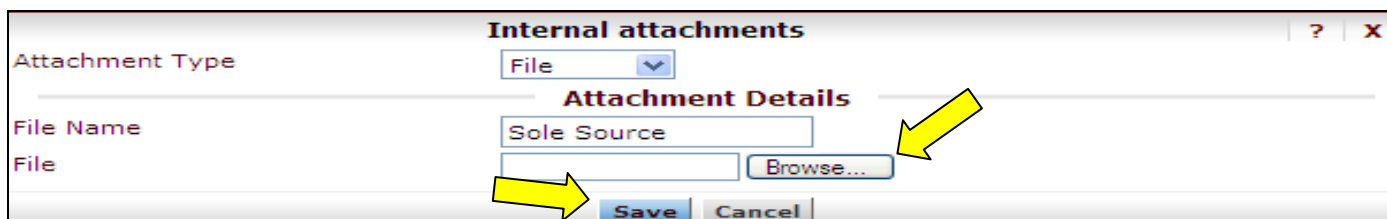


Figure 44

These materials are Proprietary and Confidential to the Purchasing Services Department at the University of CT Health Center. Any re-publication, transmission or distribution of these materials without the express written consent of the Purchasing Services Department is strictly prohibited.

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 45

- **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 46

- 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.