



University of Connecticut Health Center HuskyBuy Training Manual

PROCEDURE NUMBER: 2010-P8

HOW TO SUBMIT YOUR PURCHASE REQUISITION

OVERVIEW:

Requisitioners and Approvers are allowed to create their own shopping carts, proceed to checkout and place orders. Shoppers are only able to create a shopping cart and proceed to check out. However, Shoppers must assign the shopping cart to a Requisitioner or Approver to place the order. An Approver can approve, reject or return a request to order. Once the order has been placed, it becomes a requisition and the workflow process is initiated. View audio visual *Lesson #7 Checking Out* for additional information. Refer to University of CT Health Center Policy Number 2006-29 (Purchase Requisition Source Document) for purpose, scope, policy statement, definitions, and responsibilities.

PROCEDURE:

STEP 1: SELECTING AN ACTIVE SHOPPING CART

- I. Are you attempting to place an order of a shopping cart that was assigned to you?

YES,
Proceed to I. a)

NO,
Proceed to I. b)

- a) You will receive an email notification informing you that a shopping cart has been assigned to you.
 - If a note was indicated on the note to assignee field when the cart was assigned, it will appear within the email as an additional comment.
 - Click on the link to log into HuskyBuy.

NOTE: DO NOT RESPOND TO ANY AUTOMATED EMAIL NOTIFICATIONS.

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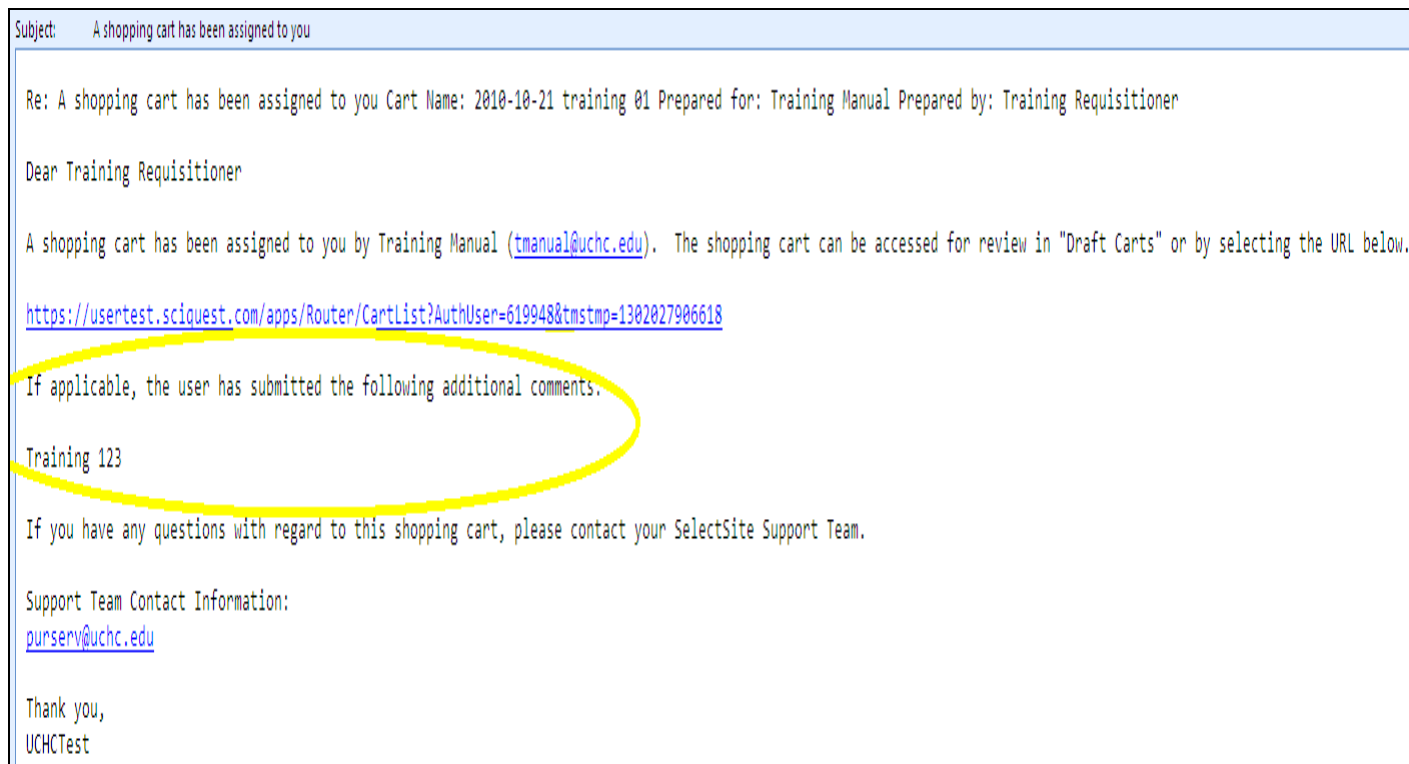


Figure 1

- Once you log in you will be redirected to the **cards** navigation tab and **draft cards** sub-tab.
- A list of carts that were assigned to you are listed under **Drafts Assigned To Me**.
- Click on the shopping cart name in which you want to place the order.

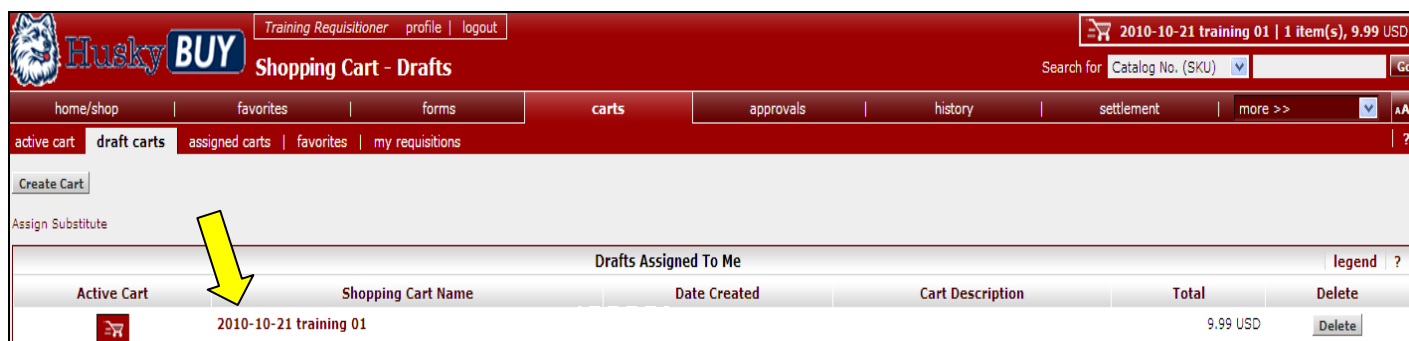


Figure 2

- Proceed to *Step 8: Place Order* to continue **only** if the person who assigned you the cart has completed all the fields required to place the order and you received the following message: "All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page".

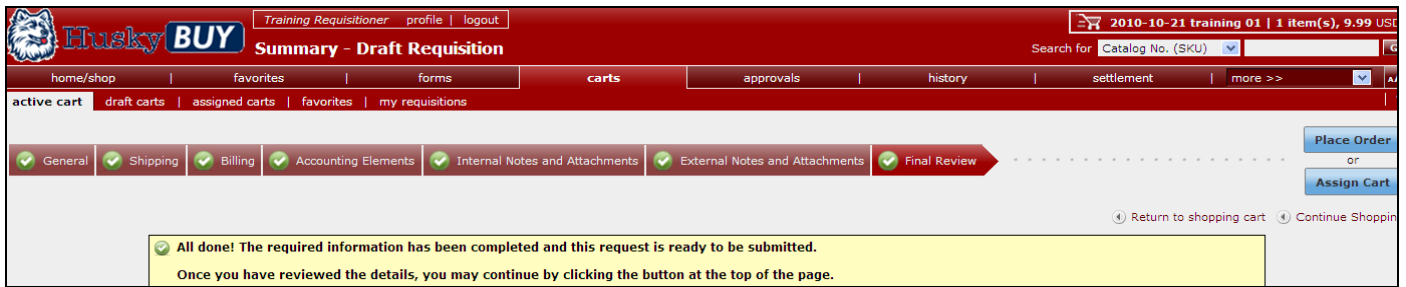


Figure 3

- Proceed to *Step 2: General Information* to continue **only** if the person who assigned you the cart has not completed all the fields required to place the order and you received the following message: "Almost ready to go! The list below needs to be addressed before the request can be submitted".

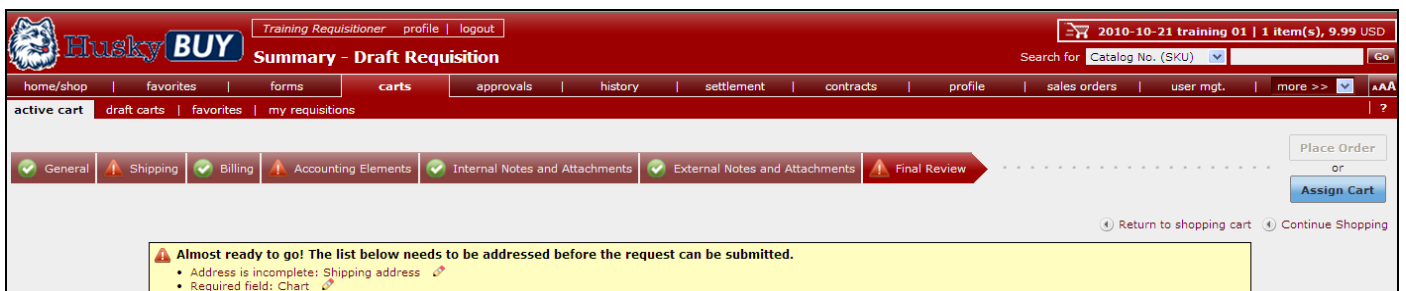


Figure 4

- b) Proceed to *Step 8: Place Order* to continue.

NOTE: If you want to check out a shopping cart that you previously created, go to the carts navigation tab and draft carts sub-tab and double-click on the cart name to select a cart to checkout.

STEP 2: GENERAL INFORMATION

The general section contains descriptive information about your purchase request.

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

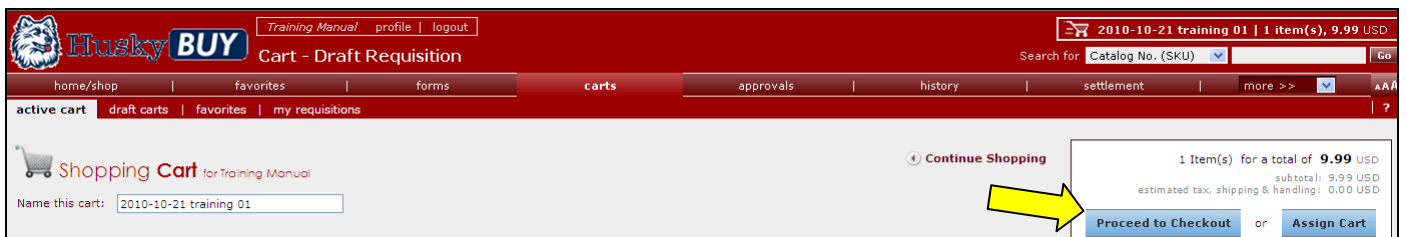


Figure 5

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

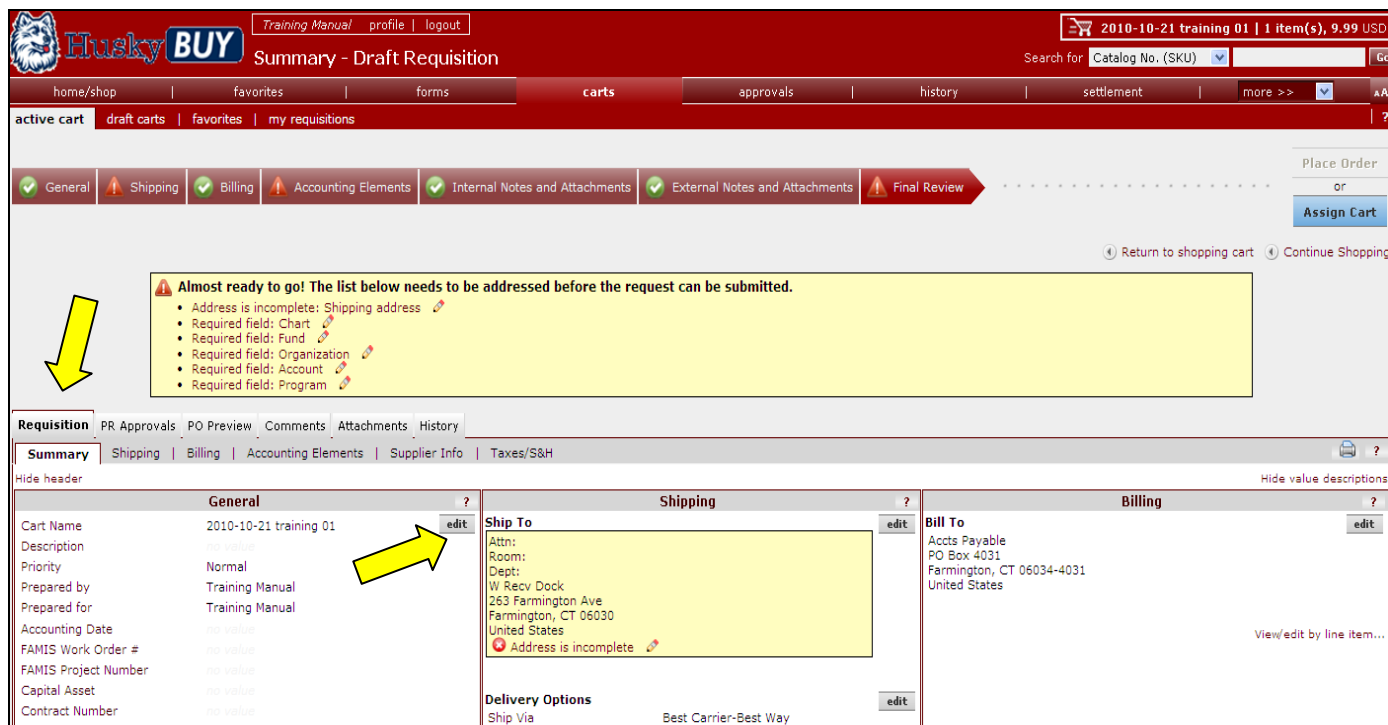


Figure 6

- **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.

General

Cart Name: 2010-10-21 training 01

Description: [Empty]

Priority: Normal [v] ←

Prepared by: Training Manual

Prepared for: Training Manual
Select a different user...

Accounting Date: [Empty] [Calendar icon]
mm/dd/yyyy

FAMIS Work Order #: [Empty]

FAMIS Project Number: [Empty]

Capital Asset: [Empty]

Contract Number: [Empty]

IT Project Number: [Empty]

IT Work Order #: [Empty]

FRS PO Number: [Empty]

[Save] [Cancel] ←

Figure 7

STEP 3: SHIPPING

The shipping section is a required field which contains information relating to the delivery and shipping instructions for your purchase request.

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

Husky BUY | Training Manual | profile | logout | 2010-10-21 training 01 | 1 item(s), 9.99 US

Shipping - Draft Requisition

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

active cart | draft carts | favorites | my requisitions

General [v] | Shipping [!] | Billing [v] | Accounting Elements [!] | Internal Notes and Attachments [v] | External Notes and Attachments [v] | Final Review [!]

Place Order or Assign Cart

Return to shopping cart | Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Address is incomplete: Shipping address [edit]

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 [edit] ←

Shipping address [Attn: [edit]]

Figure 8

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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](#).

Ship To

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: Training Manual
Room: MC4036
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

Save Cancel

Figure 9

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 3 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 requisition 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' tab is selected. The main content area is divided into two sections: 'Shipping' and 'Supplier / Line Item Details'. The 'Shipping' section contains 'Ship To' and 'Delivery Options' fields, both with 'edit' buttons. The 'Supplier / Line Item Details' section shows a table with one item from 'Fisher Scientific'. The table has columns for 'Product Description', 'Catalog No', 'Size / Packaging', 'Unit Price', 'Quantity', and 'Ext. Price'. The item is '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'. Below the table, there are 'Ship To (same as header)' and 'Delivery Options (same as header)' fields, each with an 'edit' button. A yellow arrow points to the 'edit' button for 'Ship To'.

Figure 10

- Once you have completed the **Shipping Address, Attn, Room and Dept** fields
- Click on **Save** and proceed to *Step 3 Section I. c)* to select delivery options.

The screenshot shows a 'Ship To' dialog box. It contains instructions: '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.' There is a 'Shipping address' field with a dropdown menu showing 'West Receiving Dock'. Below this is a link: 'To choose a different address, click here'. The 'Address Details' section has several 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), and 'Country' (United States). At the bottom, there are 'Save' and 'Cancel' buttons. A yellow arrow points to the 'Save' button.

Figure 11

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

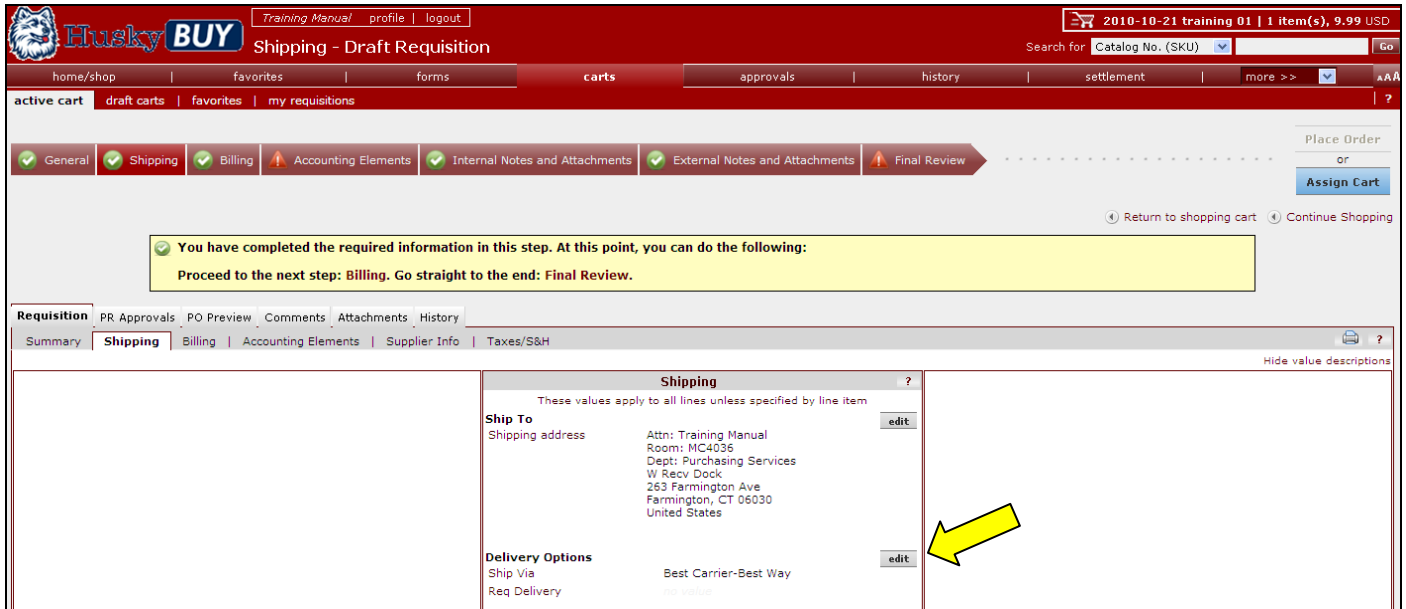


Figure 12

- **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**.

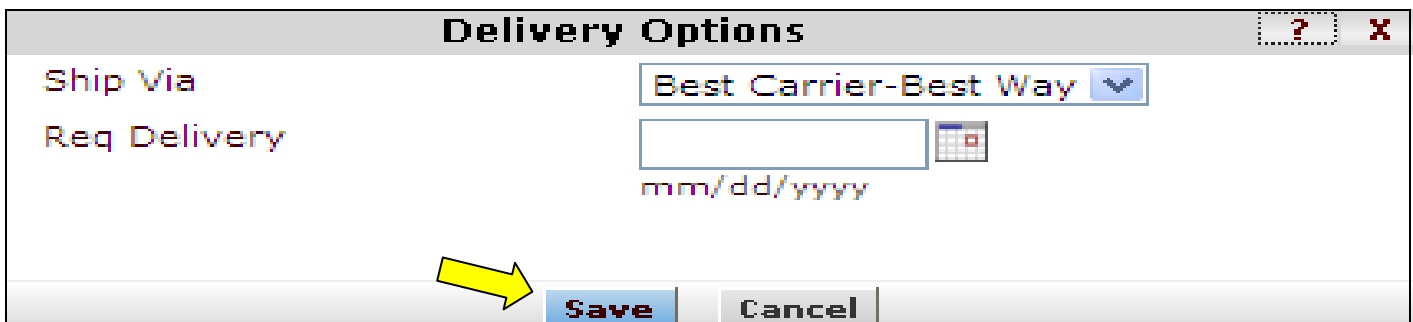


Figure 13

STEP 4: 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.

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

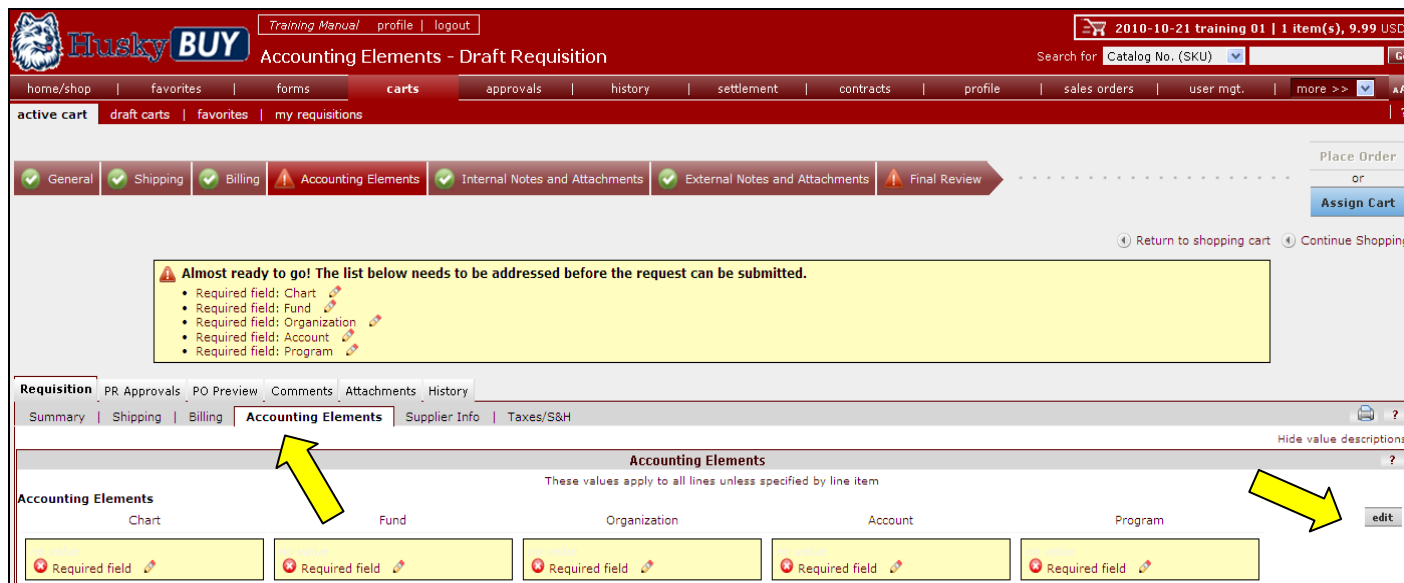


Figure 14

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.

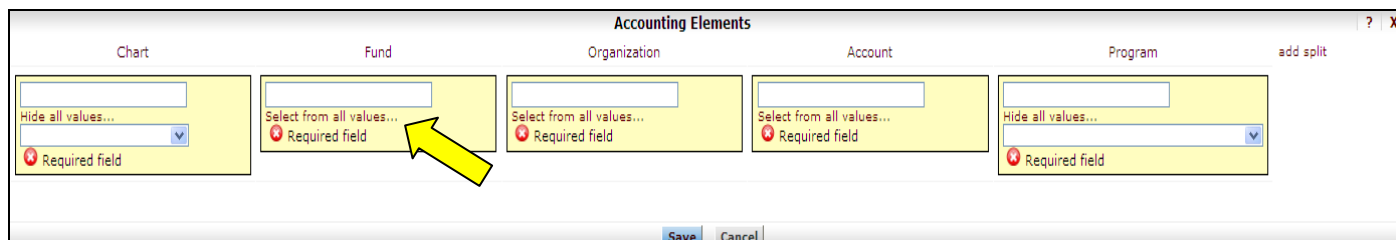


Figure 15

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Figure 16

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 17

- Click on **Save** and proceed to *Step 5: Adding Notes* to continue.

Figure 18

- 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 5: 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 19

STEP 5: 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.

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

Figure 20

Figure 21

- **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.

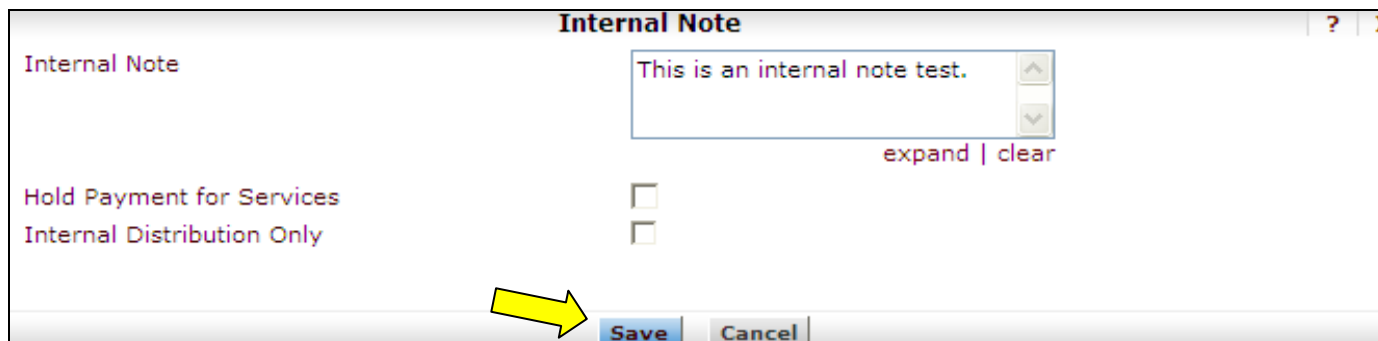


Figure 22

STEP 6: 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.

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**.

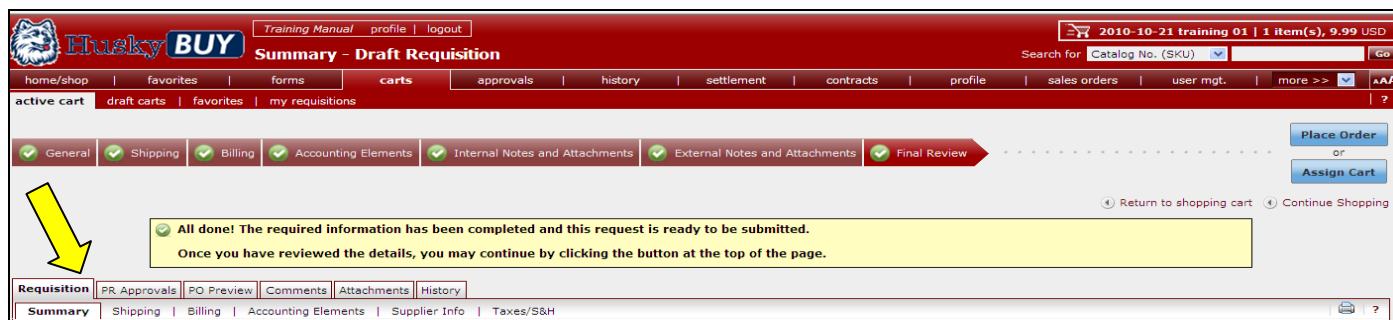


Figure 23

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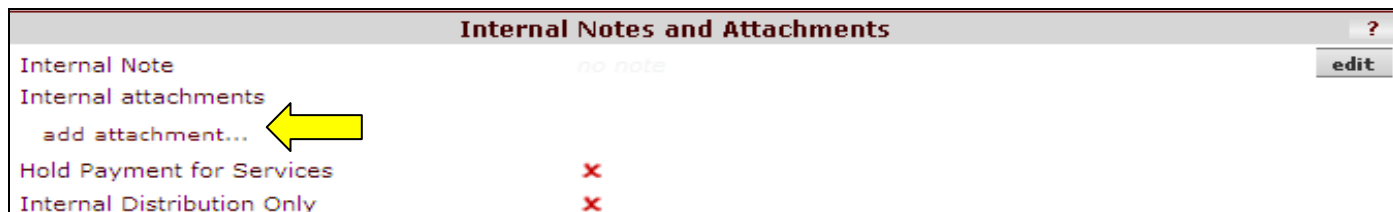


Figure 24

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**.

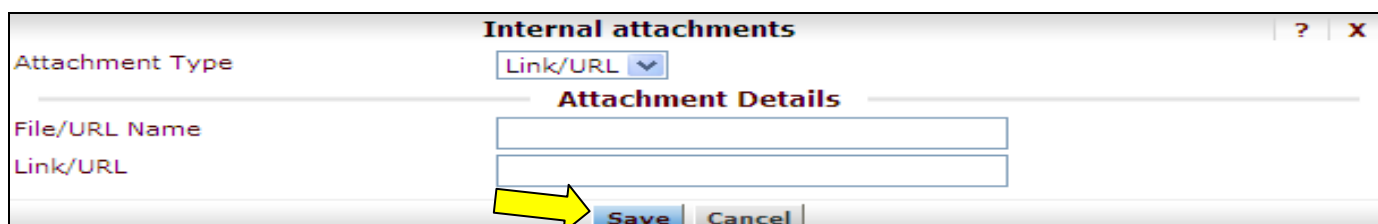


Figure 25

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.

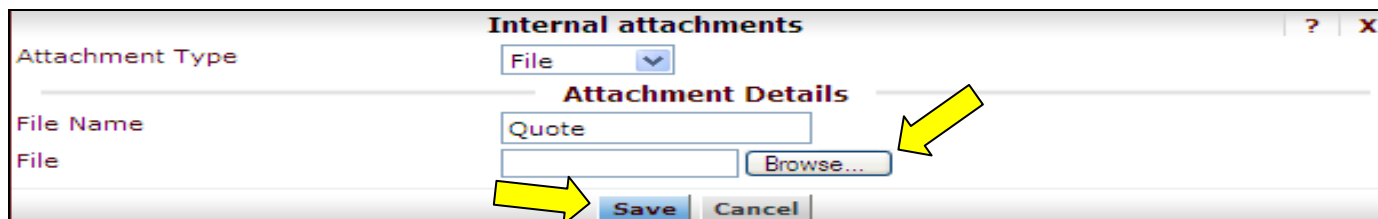


Figure 26



Figure 27

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STEP 7: SUPPLIER / LINE ITEM DETAILS

The Supplier/Line Item Details section allows you to make changes to each line item if needed.

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 6: Adding Attachments* for instructions on how to attach a quote.

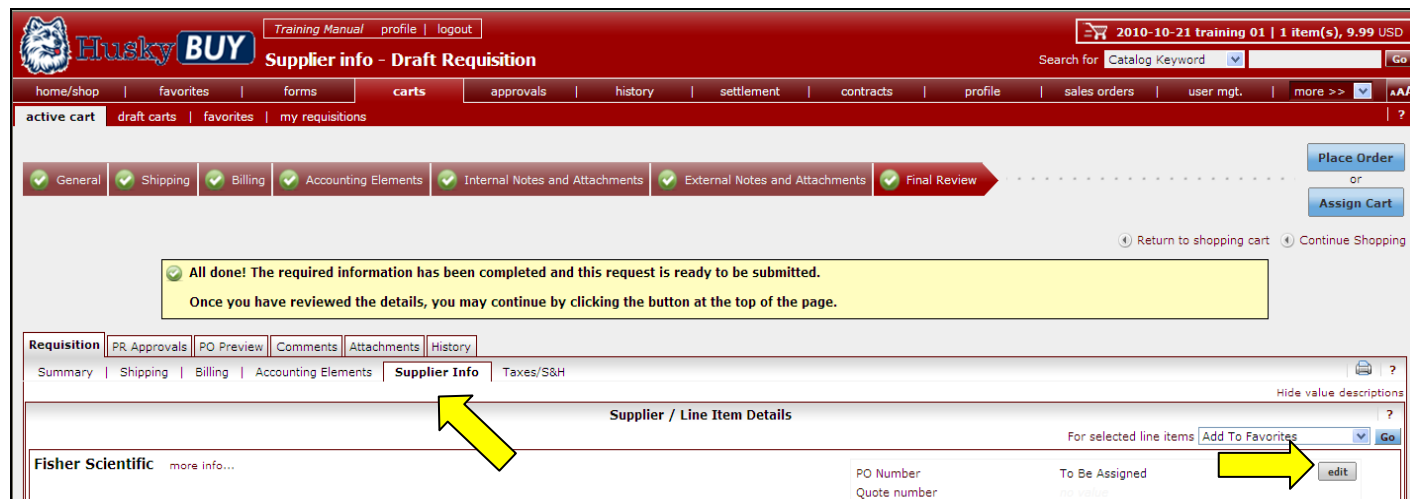


Figure 28

- **Quote number** – enter in the quote number provided by the Supplier.
- Click on **Save** and proceed to *Step 8: Place Order* to continue.

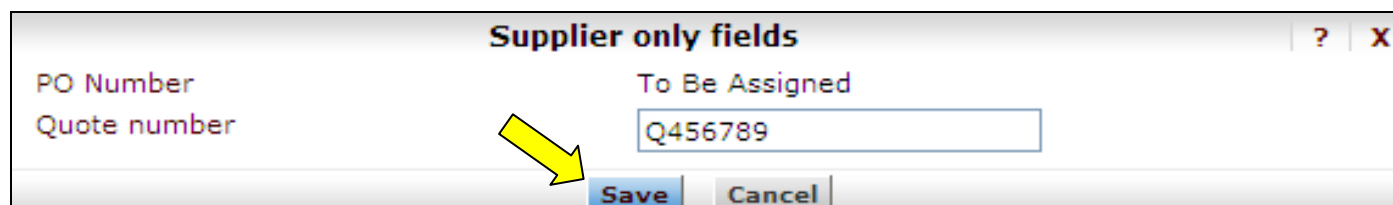


Figure 29

b) Proceed to *Step 8: Place Order* to continue.

STEP 8: PLACE ORDER

- Under the **carts** navigation tab and **active carts** sub-tab click on **Place Order**.

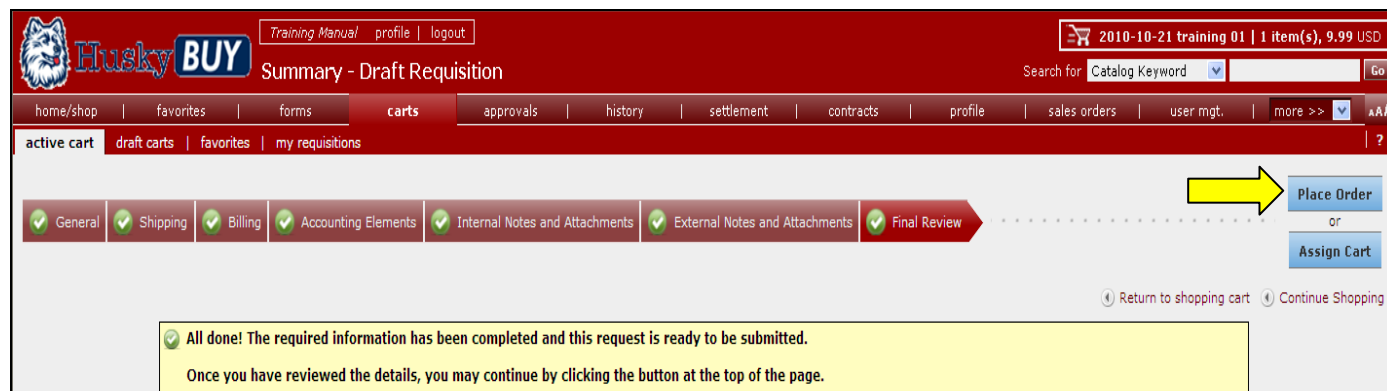


Figure 30

- You will receive the following message: "Congratulations! You have successfully submitted your request".

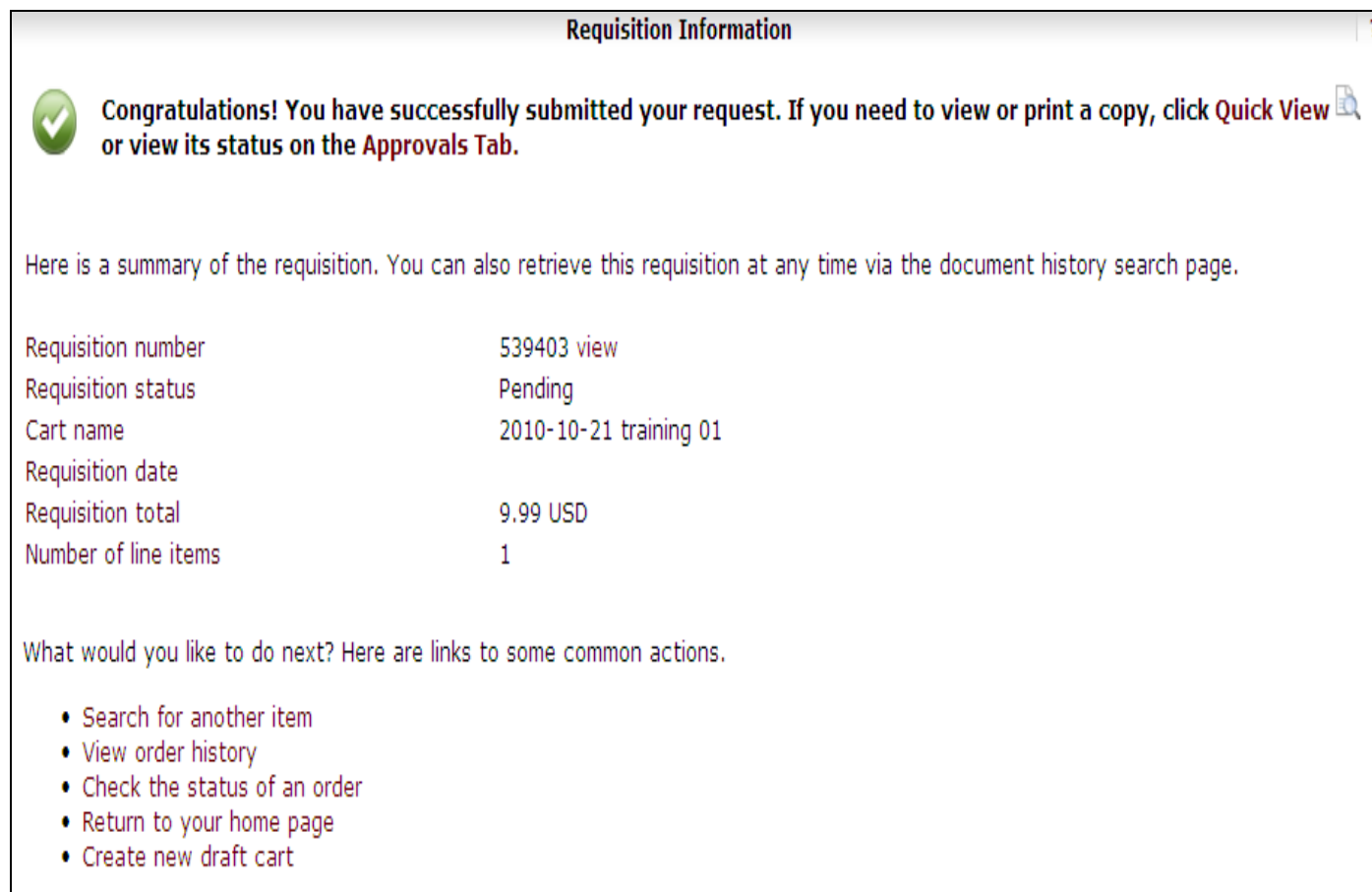


Figure 31

- You will receive an email notification informing you that your requisition was submitted for approval.

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Figure 32