



University of Connecticut Health Center HuskyBuy Training Manual

PROCEDURE NUMBER: 2011-P11

HOW TO REQUEST A CONTRACT

OVERVIEW:

A request for a contract should be submitted on a Non-Catalog Form. All required documents (for example, Information Sheet, Sole Source Justification) must be attached before the requisition is routed through workflow.

PROCEDURE:

STEP 1: CREATING A SHOPPING CART

It is very important to create a separate shopping cart for every contract request. Naming your shopping cart for contract requests assists in easily identifying contract-related purchase requisitions.

- Select the **carts** navigation tab.
- Select the **draft carts** sub-tab.
- Click on **Create Cart**.

NOTE: If this is your first time creating a cart you will receive the following message: "You do not have an active cart selected. Please create a new cart."

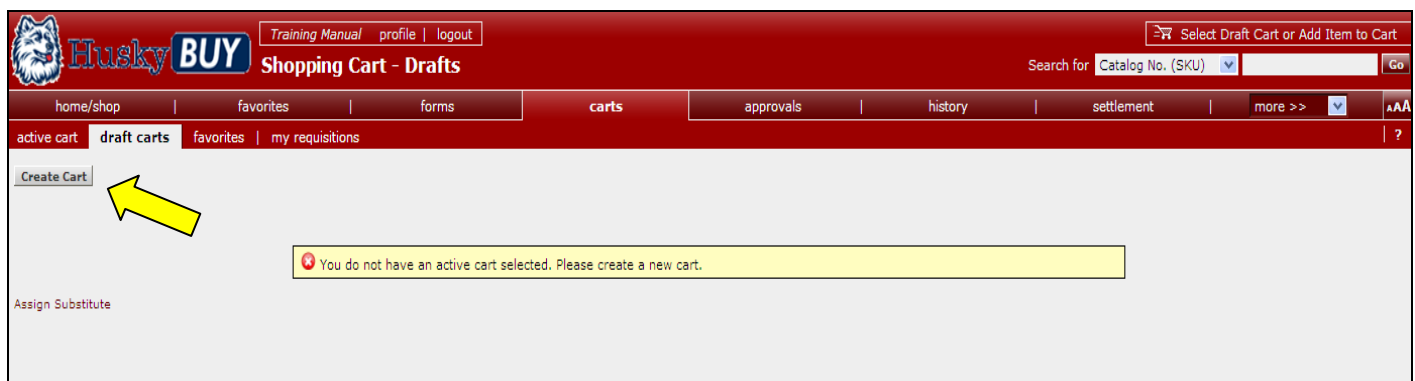


Figure 1

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- You will automatically be redirected to the **cars** navigation tab and **active cart** sub-tab.

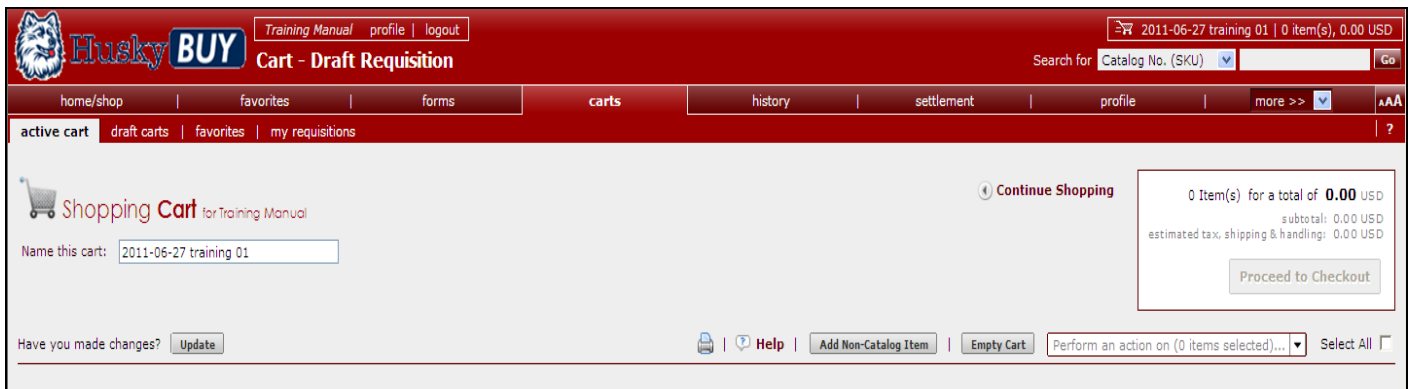


Figure 2

- Name this cart** – edit the system generated shopping cart name by clicking in the Name this cart field and adding the word “CONTRACT” to the beginning of the shopping cart name.



Figure 3

- Click on **Update** to save your changes.



Figure 4

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STEP 2: ADDING A NON-CATALOG ITEM TO YOUR SHOPPING CART

- Click on **Add Non-Catalog Item**.



Figure 5

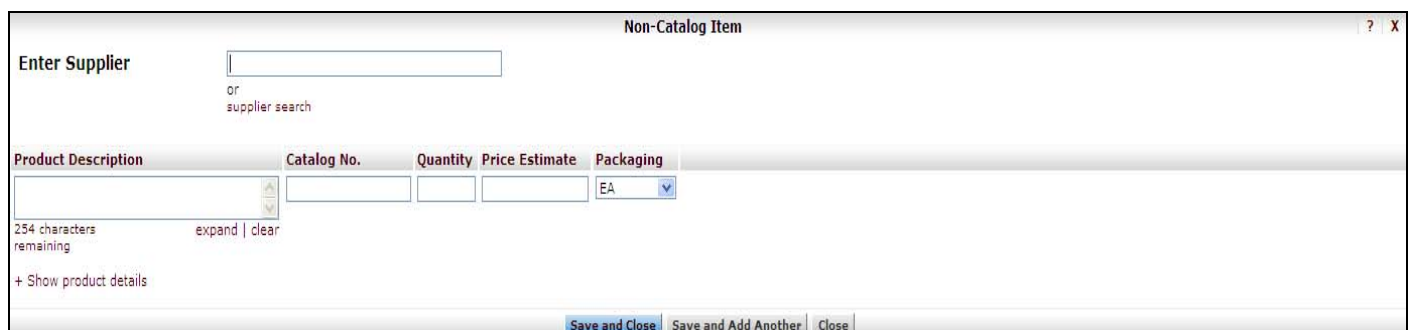


Figure 6

STEP 3: CHOOSE A SUPPLIER

- **Enter Supplier** – enter the Supplier's name. Once the name appears, click on the Supplier's name to select it.

NOTE: To search for a Supplier, click on supplier search and a pop-up box will appear. Click on Search and the entire supplier list will appear. Click on Select next to the correct Supplier's address. If you are unsure what address to select, select the first address indicated.

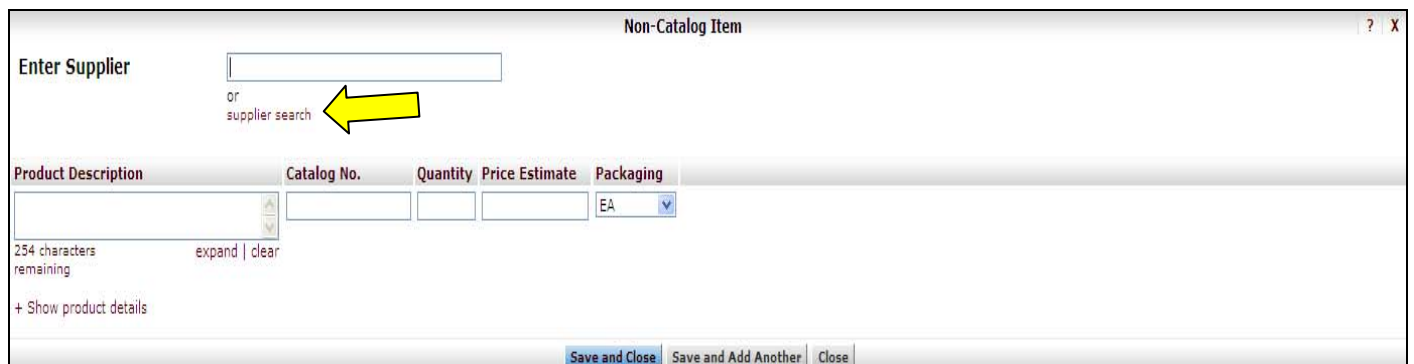


Figure 7

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The image shows a 'Supplier Search' form. It has a text input field for 'Supplier', a dropdown menu for 'Results per page' set to '20', and two buttons: 'Search' and 'Cancel'. A yellow arrow points to the 'Search' button.

Figure 8

The image shows a table titled 'Suppliers found: 95'. The table has columns for 'Supplier Name/Address' and 'Select'. A yellow arrow points to the 'Select' button for the first supplier, '3m Company'.

Supplier Name/Address	Select
3m Company BU Corporate 1: GENERAL OFFICES/3M CENTER ST. PAUL, MN 55144 US BU Corporate 2: 2111 MCGAW AVENUE IRVINE, 92714 US BU Corporate 3: SERVICE CENTER BLDG. 275-4W-02, 3M CENTER ST PAUL, MN 55144-1000 US BU Corporate 4: SUITE 200 - BLDG 502 3350 GRANADA AVENUE NORTH OAKDALE, MN 55128 US	Select
ABCO Welding & Ind Supply BU Business 1: 1608 John Fitch Blvd Fulfillment Center South Windsor, CT 06074 US	Select
Accredo Health Group BU Corporate 1: WARRENDALE & WEXFORD PO BOX 99768 CHICAGO, IL 60690-7468 US	Select
Advanced Computer Technologies * Business 1: 108 MAIN STREET NORWALK, CT 06851 US	Select
Alternative Supplier Fulfillment Address 1:	Select
Ameridose LLC BU Corporate 1: PO BOX 4140 WOBURN, MA 01888 US	Select
Arthrex Inc BU Corporate 1: 1370 Creekside Blvd Naples, FL 34108 US	Select
Bartholomew Company Inc Business 1: 3324 MAIN STREET HARTFORD, CT 06120 US	Select
Baxter Healthcare Corp BU Corporate 1: 1627 LAKE COOK RD DEERFIELD, IL 60015 US	Select

Figure 9

NOTE: If you are unable to find the Supplier you were searching for, exit out of the supplier search and enter "TBD" in the Enter Supplier field of the non-catalog form.

The image shows a 'Non Catalog Item' form. The 'Enter Supplier' field contains 'TBD'. Below it is a dropdown menu with 'TBD - To Be Determined' selected. The form also has fields for 'Product Description', 'Catalog No.', 'Quantity', 'Price Estimate', and 'Packaging'. A yellow arrow points to the 'Enter Supplier' field.

Figure 10

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STEP 4: ADDING A NON-CATALOG FORM TO YOUR SHOPPING CART

- **Product Description** – enter detailed information about the product or service.
- **Catalog No.** – enter "Contract".
- **Quantity** – enter "1".
- **Price Estimate** – enter the estimated or actual price, if any, associated with the product or service described.
- **Packaging** – click on the drop-down arrow to select "LO" for lot.
- Click on **Save and Close**.

NOTE: If you are requesting a *Revenue Generating Contract* please be sure to enter "0" in the price estimate field.

Product Description	Catalog No.	Quantity	Price Estimate	Packaging
Consulting - grant funded - for Embedding Public Health in Community College Curricula Project. Information Sheet attached.	CONTRACT	1	87000	LO

Figure 11

STEP 5: SHIPPING

The shipping section is a required field which contains information relating to the shipping location for on-going purchases related to your contract request. In most cases the shipping address would be that of the requesting department.

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

Shopping Cart for Training Manual

Name this cart: CONTRACT 2011-06-27 training 01

1 Item(s) for a total of 87,000.00 USD
subtotal: 87,000.00 USD
estimated tax, shipping & handling: 0.00 USD

Figure 12

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

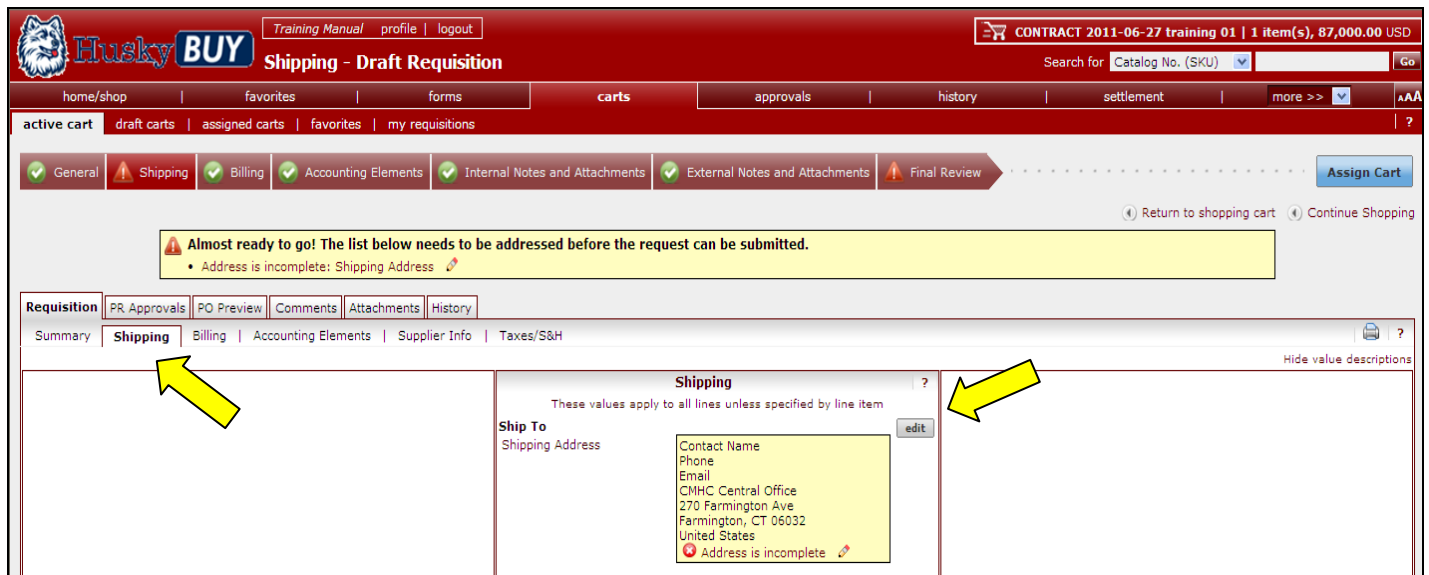
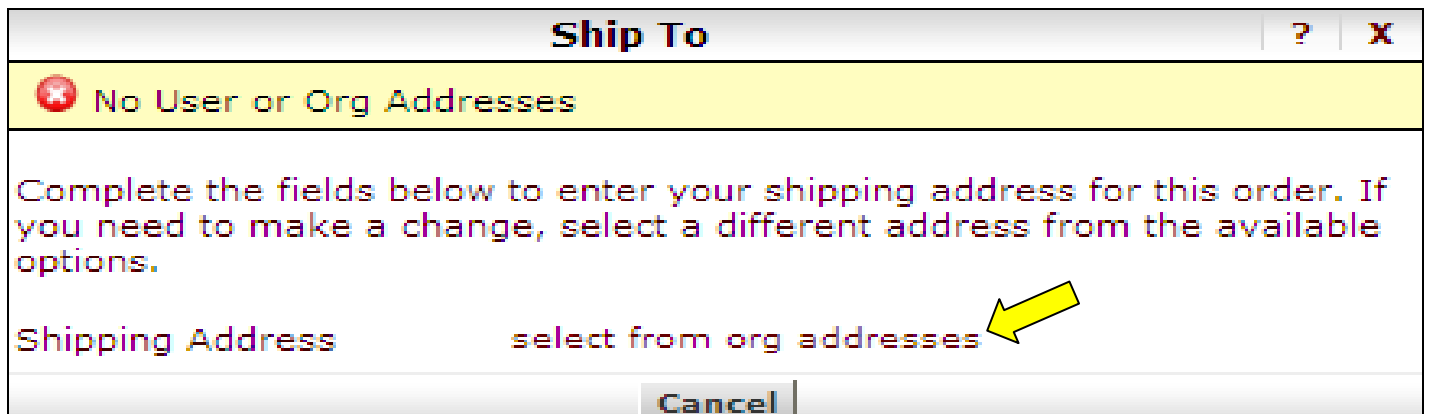


Figure 13

- Click on **select from org address** and a pop-up box will appear.



- Click on **Search** to search for a list of shipping addresses.

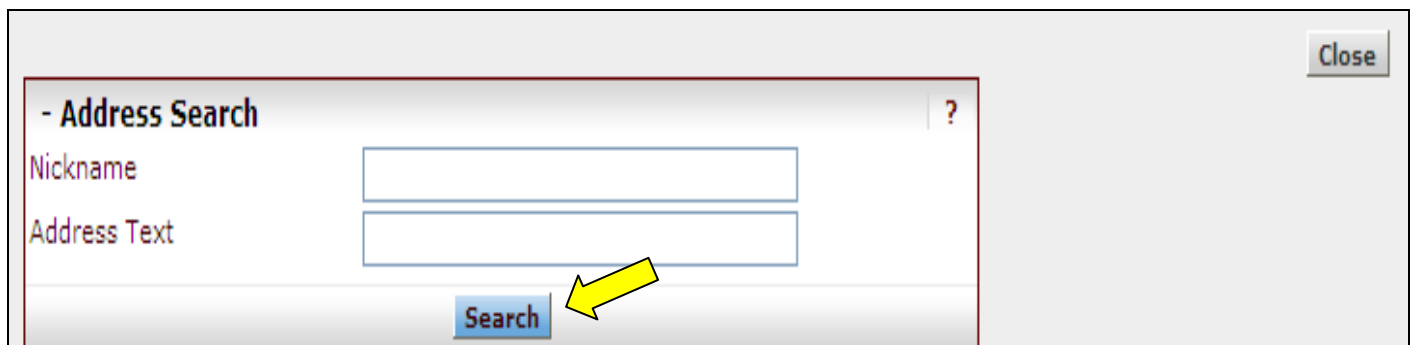


Figure 14

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- Click on **select** next to the correct shipping address.

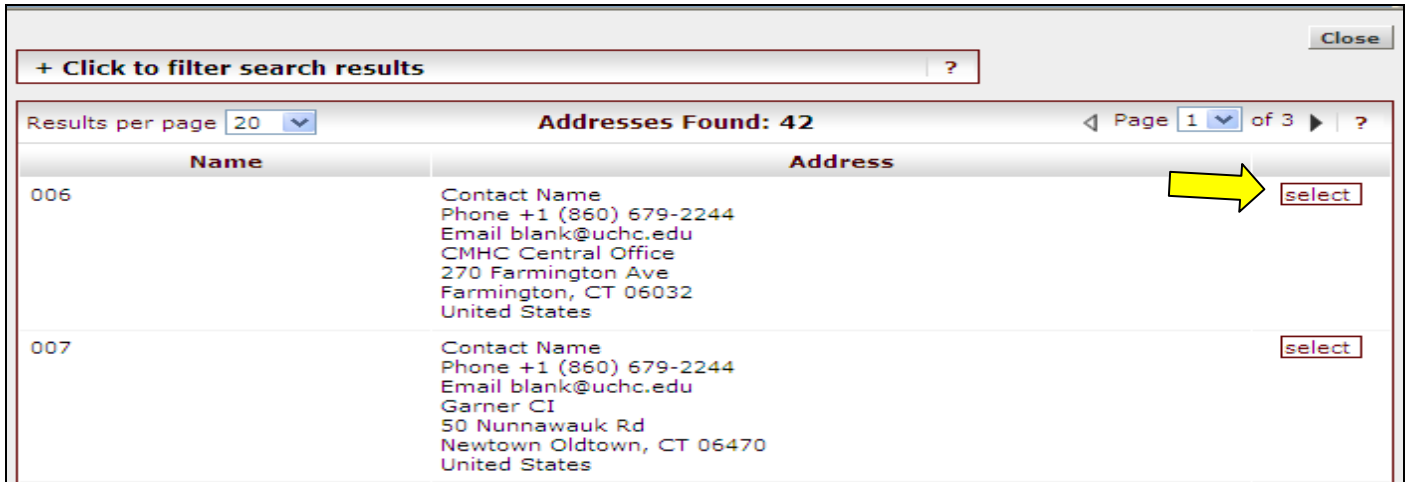


Figure 15

- **Contact Name** – verify that the contact name is indicated. If not, please be sure to enter the correct contact name.
- **Phone** – verify that the correct phone number is indicated. If not, please be sure to enter the correct phone number.
- **Email** – verify that the correct email address is indicated. If not, please be sure to enter the correct email address.
- Click on **Save**.

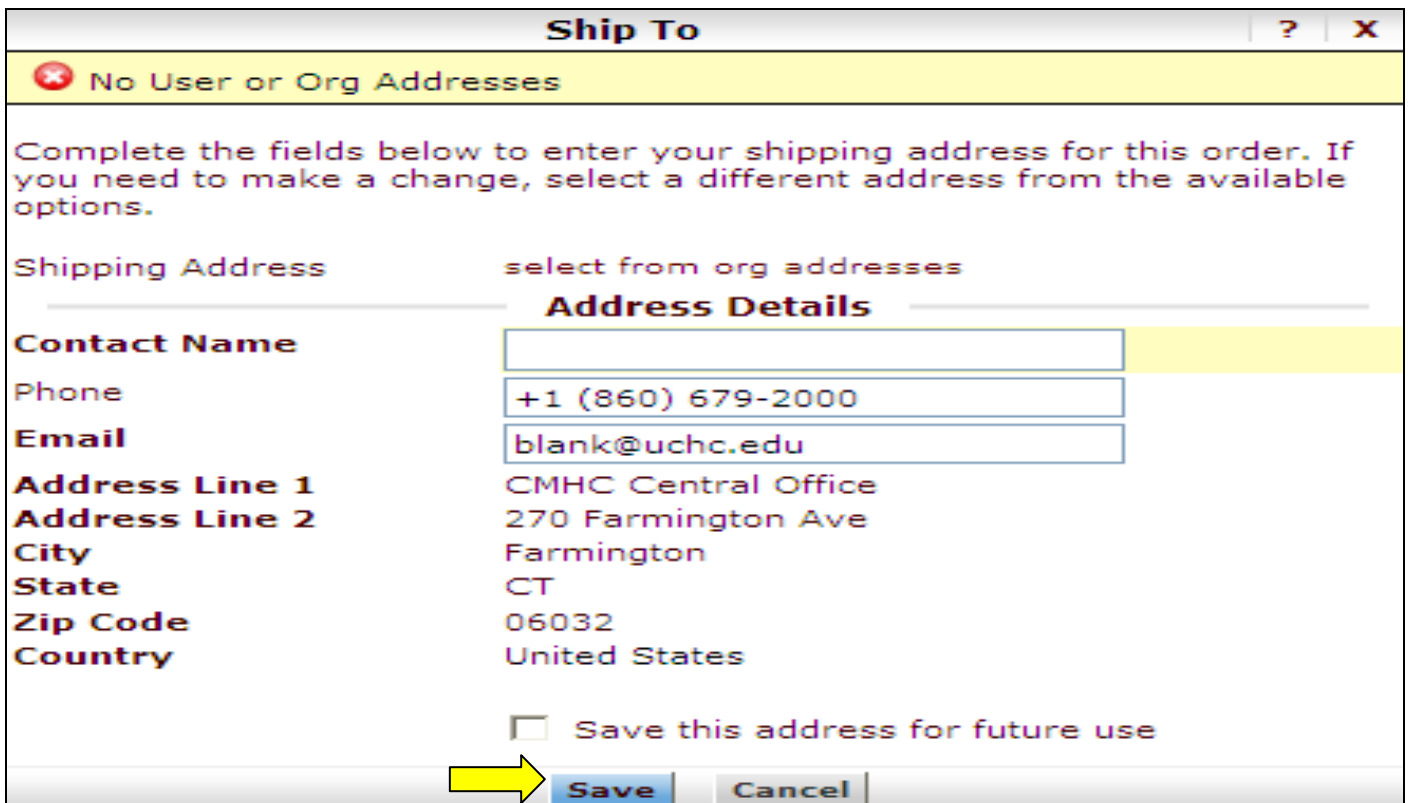


Figure 16

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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.

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



Figure 17

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.

NOTE: Do NOT attempt to use a "Revenue" account for *Revenue Generating Contracts*. Select the correct account associated with the service provided.

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The screenshot shows the 'Accounting Elements' form with five main sections: Chart, Fund, Organization, Account, and Program. Each section contains a 'Select from all values...' dropdown menu and a 'Required field' indicator. A yellow arrow points to the Fund field's dropdown menu.

Figure 18

The screenshot shows a dialog box titled '- Custom Field Search'. It has two input fields labeled 'Value' and 'Description'. Below these fields is a blue 'Search' button. A yellow arrow points to the Search button.

Figure 19

The screenshot shows a search results table with the following data:

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
200001	Cardiology Education Fund	select

A yellow arrow points to the 'select' button in the right column of the first row.

Figure 20

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

The screenshot shows the 'Accounting Elements' form with the 'Save' button highlighted by a yellow arrow.

Figure 21

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- 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.

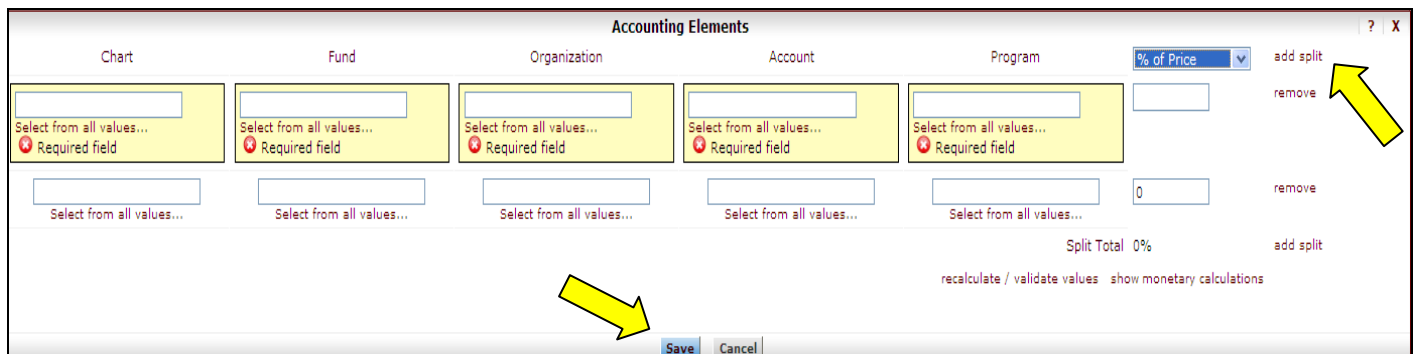
The screenshot shows a web form titled "Accounting Elements". It has five main columns: Chart, Fund, Organization, Account, and Program. Each column contains a text input field with a dropdown arrow and a "Required field" error message. To the right of the Program column is a dropdown menu currently set to "% of Price" and a "remove" button. Below these columns are two more rows of similar input fields. At the bottom right, there is a "Split Total" field showing "0%", a "recalculate / validate values" button, and a "show monetary calculations" link. At the very bottom are "Save" and "Cancel" buttons. Two yellow arrows point to the "add split" button (top right) and the "Save" button (bottom center).

Figure 22

STEP 7: ADDING NOTES AND ATTACHMENTS

Users have the ability to add a detailed note and an attachment to the requisition. Internal notes and attachments are not sent to Suppliers. Attachments can be in various formats or a hyperlink. The notes and attachments that you add are available to Approvers for review as the requisition goes through workflow.

NOTE: It is important to attach all applicable contract-related documents to your contract request before the cart gets submitted to workflow. If the purchase request goes through workflow without required attachments, the request will have to be returned to the requisitioner and resubmitted to workflow with the attachments so that all pertinent information about the request can be approved. Contract requests should always have an attachment (a CIS form, a Quote, a vendor contract or other document) and Attachment Type "Purchasing Form" must be selected.

- Make sure that the document you want to attach has been saved to your computer.
- Click on the **Requisition** and **Summary** sub-tabs.
- Under the **Internal Notes and Attachments** section click on **add attachment**.

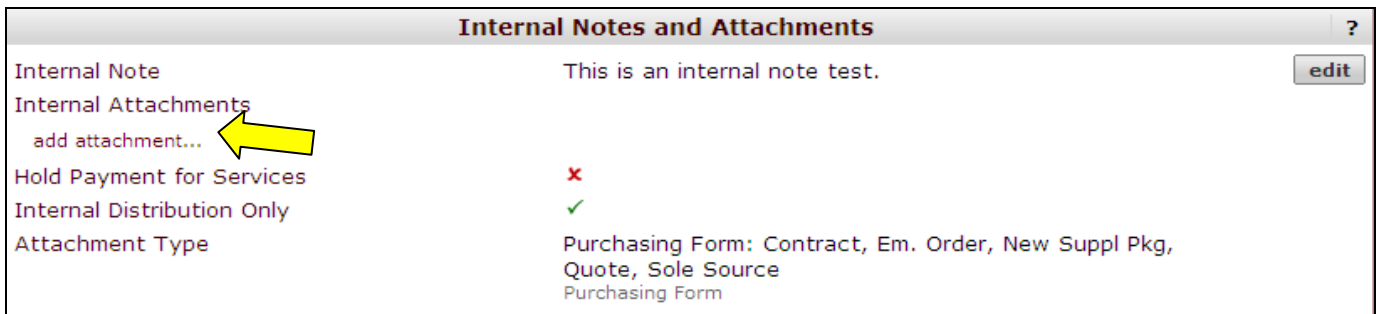


Figure 23

FILES:

- **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: You must repeat the add attachment process to attach any other required documents. Below are a few examples of adding an internal attachment.

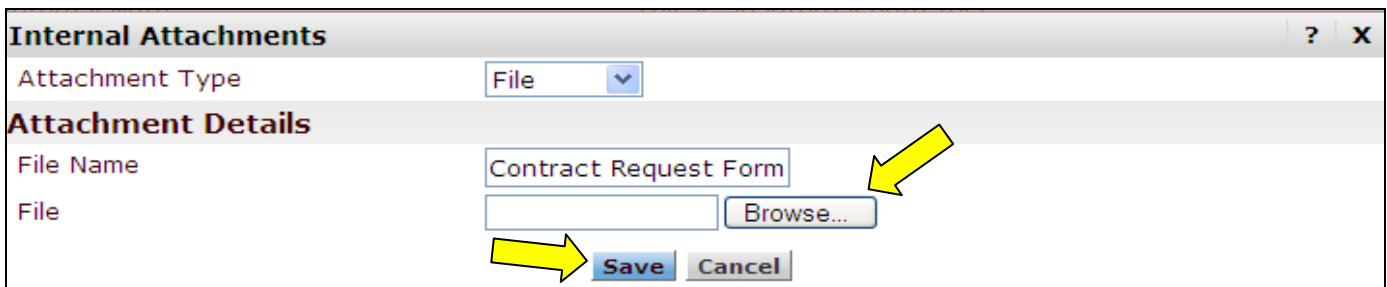


Figure 24

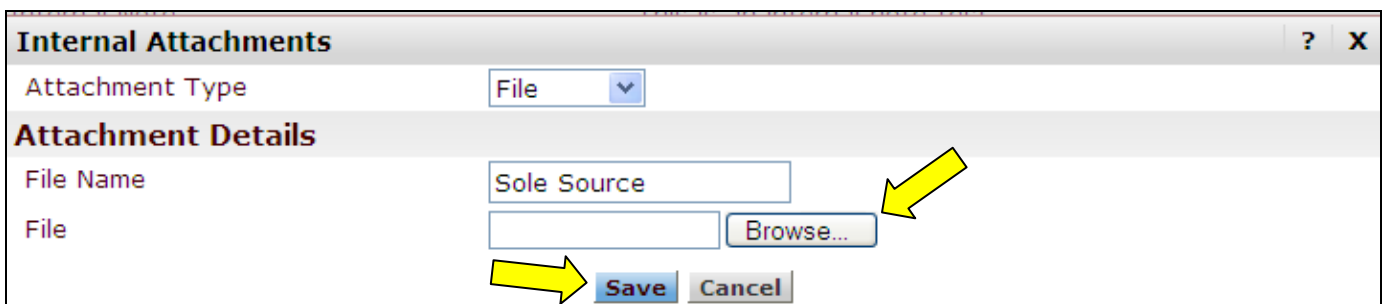


Figure 25

- Under the **Internal Notes and Attachments** section click on **edit**.

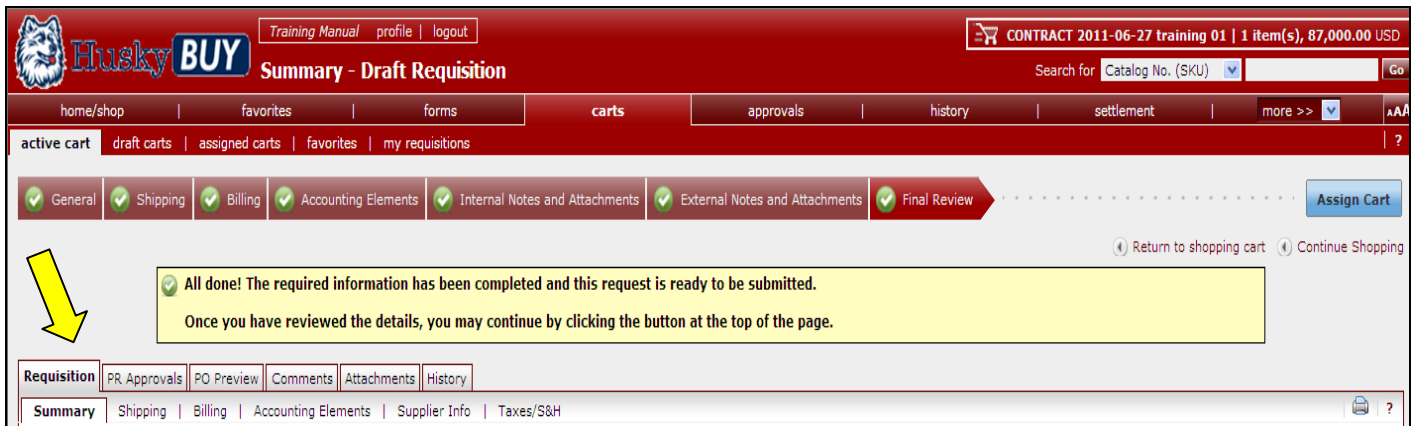


Figure 26

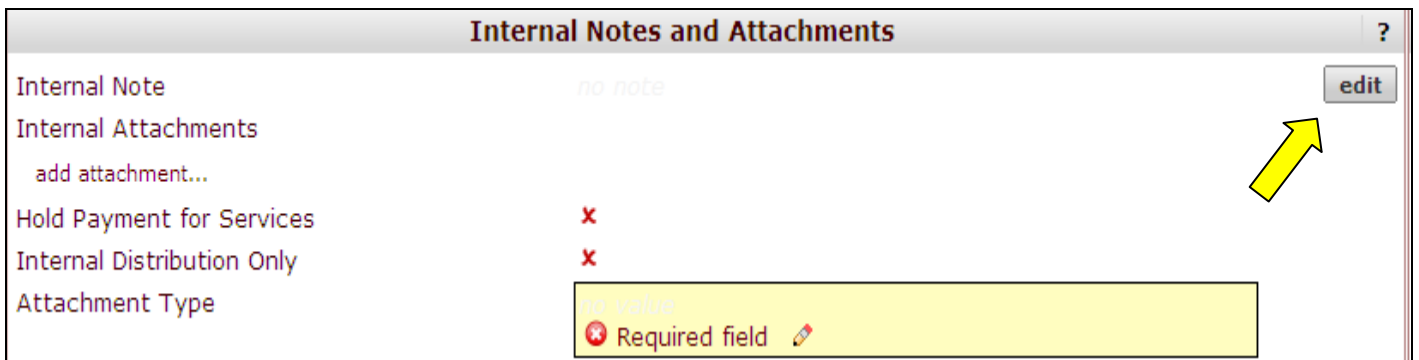


Figure 27

- **Internal Note** – this is an optional field in which you can enter a note to be viewed internally.
- **Internal Distribution Only** – if this option appears, click the check box if you don't want the PO to be distributed to the supplier.
- **Attachment Type** – click on the drop-down arrow to select "Purchasing Form".
 → This is mandatory for all contract requests.
- Click on **Save**.

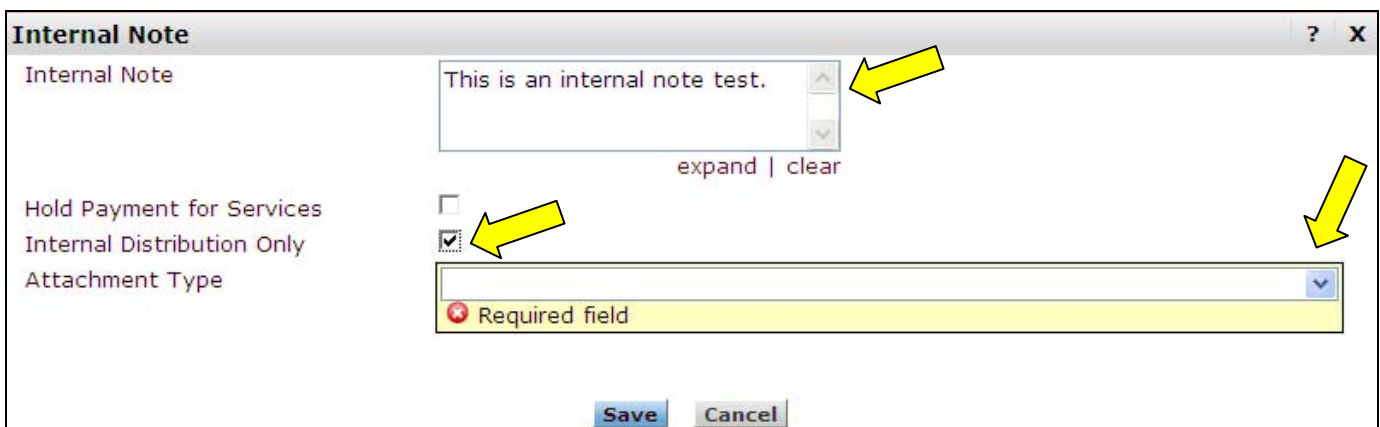


Figure 28

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Internal Note ? X

Internal Note This is an internal note test. expand | clear

Hold Payment for Services

Internal Distribution Only

Attachment Type

- All Other Forms
- No Attachment
- Purchasing Form: Contract, Em. Order, New Suppl Pkg, Quote, Sole Source

Save Cancel

Figure 29

Internal Note ? X

Internal Note This is an internal note test. expand | clear

Hold Payment for Services

Internal Distribution Only

Attachment Type Purchasing Form: Contract, Em. Order, New Suppl Pkg, Quote, Sole Source

Save Cancel

Figure 30

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