



University of Connecticut Health Center

# HuskyBuy Departmental Configuration:

A departmental guide for initial setup and future reconfiguration of departmental workflow.



## Mapping out your department:

*In mapping out your department there are several things you will need to consider. The first things you will need to know in order to complete this mapping process, are the role definitions listed below.*

### Shopper:

*A Shopper has the ability to create a shopping cart, assign coding to the order and assign the cart to a Requisitioner. Shoppers do not have financial approval and will need to assign carts to a Requisitioner to complete and place the order. A Shopper has the ability to add coding, but is not required to do so in order for the cart to be assigned.*

### Requisitioner:

*A Requisitioner has the ability to create a shopping cart, assign coding and actually place the order into workflow. The Requisitioner can also take ownership of carts that are assigned to them by other users, assign or modify coding and then place orders. The Requisitioner is required to validate coding entered by a shopper or assign coding if the coding is blank. The Requisitioner must have authorization to spend from the coding entered on the order. The Requisitioner has financial responsibility for this order once it has been placed into workflow. Any returns that occur in workflow come back to the Requisitioner.*

### Departmental Approver:

*In addition to the Departmental Approver role, a Departmental Approver can perform all of the tasks of a Requisitioner. In workflow, the Departmental Approver has oversight of existing orders and can approve, return, or reject orders that come to their approval folder. Departmental Approver workflow is optional, based on departmental preference. Departmental approvers may only want to see specific orders based on a variety of factors. For example, a Departmental Approver may wish to see any departmental order that is over \$1000.00 total value or any item that has a single line item over \$1000.00.*

### Secondary Departmental Approver:

*A Secondary Departmental Approver can also perform all of the tasks as a Requisitioner. The Secondary Departmental Approver is very similar to the Departmental Approver, but is normally an additional layer of approval added for a department. The Secondary Departmental Approver can approve, return, or reject orders, but normally looks at orders for the department at a higher level. For example a Secondary Departmental Approver may want to see any departmental order over \$5000.00.*

*Other examples of orders for the Departmental and Secondary Departmental Approvers could be orders placed for capital assets or specific grants. If you are planning on using either or both approval levels, you will need to identify specific requirements that will trigger the workflow stop. Talk to your HuskyBuy Administrators if you need assistance with this.*



### Required roles:

*The only role that is required in order for a department to be able to order is the Requisitioner. The Shopper is available to allow anyone access to the system to complete online shopping. The Shoppers do not have approval to purchase items. They can only fill a shopping cart and assign that to a Requisitioner.*

### Let's start Mapping:

*There are three typical departmental configurations. They are Basic (fig. 1) Intermediate (fig. 2) and Advanced (fig. 3). Each of the examples lists out what information I need in order to set up your department. Most departments will only need the basic configuration. Some departments will likely only have one or more Requisitioner and no actual shoppers. Other departments will wish to have multi-level approvals and may even have a need to split the department into separate purchasing groups.*

### Department Splitting:

*Departments that want to set up separate purchasing groups within their departments are asked to complete separate user lists for each group. An example of this is that you have administrative staff that purchase for clinical areas and you want to keep them separate from areas that purchase for internal store rooms. You would assign separate Shoppers and Requisitioners for each group. The shoppers will have dropdown boxes for who they can assign carts to. The orders can then be placed into workflow. If there are Departmental Approvers, this will take place in workflow. Each group can have separate Departmental and Secondary Departmental Approvers, or they can all be the same.*

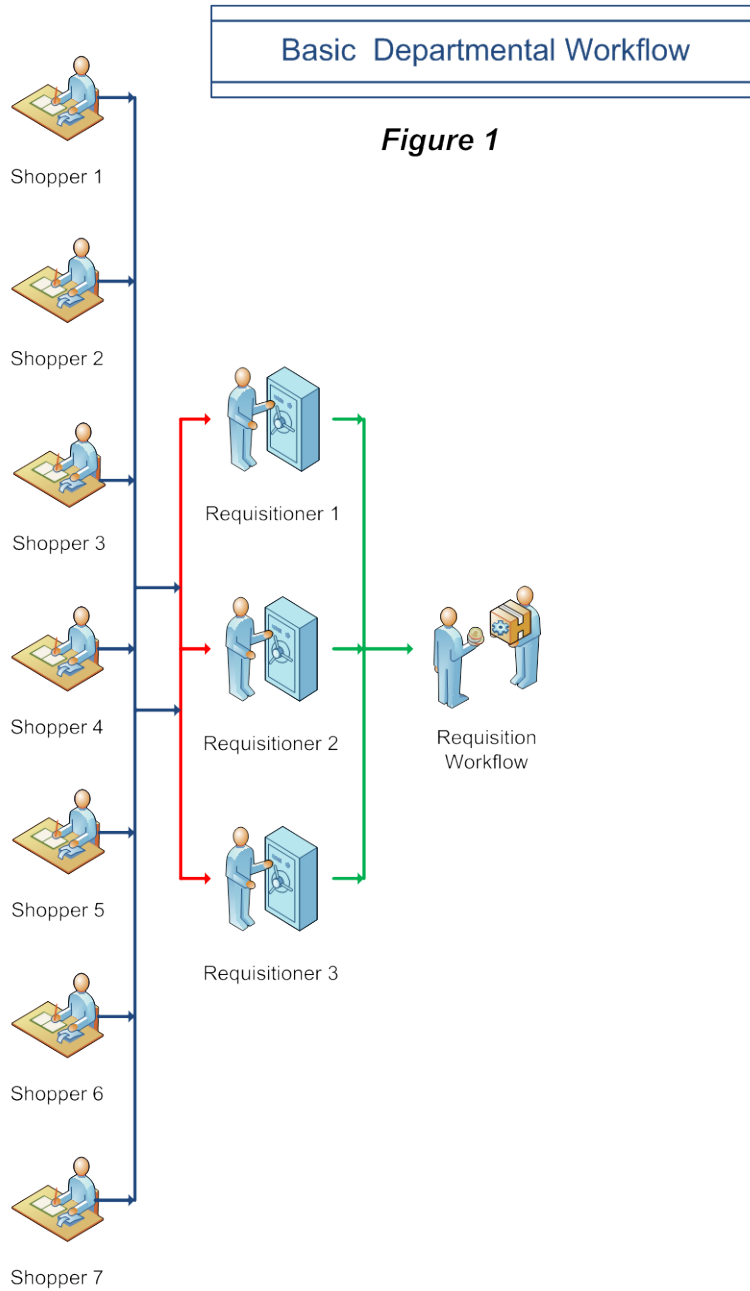
### Submitting User Names and Roles:

*Please use an excel spreadsheet for establishing and submitting users and roles(see figure 4 for an example of the spreadsheet layout). Please use the following headers within the spreadsheet to be consistent and allow for ease of data entry. Column one should be **Username**\_(this is the network login) Column 2 should be **Employee Name** (this is the employee's first and last name) Column 3 header is **Role**. Column 4 header is **Rules**. This will apply when a configuration contains Departmental or Secondary Departmental Approvers.*

*There may be additional configuration required by the departments and individual users in order to complete the mapping process for your department. Individual users may be required to perform specific Profile maintenance to comply with departmental configurations. Where applicable, these will be discussed and documented for your department.*

### Figure 4

<b>Username</b>	<b>Employee Name</b>	<b>Role</b>	<b>Rule(s)</b>
TJones	Timothy Jones	Approver	All department orders
RSmith	Robert Smith	Shopper	N/A
Fitzpatrick	Gerald Fitzpatrick	Secondary Approver	Department orders > \$1000.00
Fitzgerald	Patrick Fitzgerald	Requisitioner	N/A



**Basic Configuration: (figure 1)**

*Please submit a list of users and their roles. This configuration requires Requisitioners, Shoppers are optional. Please have more than one Requisitioner per department.*

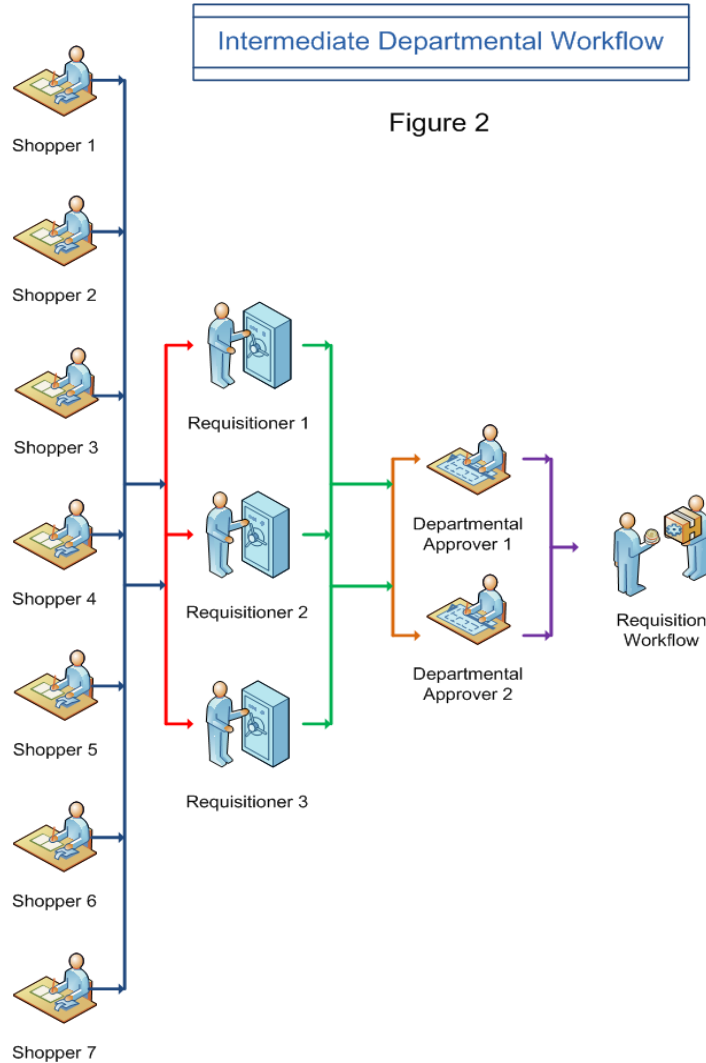


Figure 2

### Intermediate Configuration: (figure 2)

*Please submit a list of users and their roles. Also please submit the rules or circumstances that will indicate how an order will stop for departmental approver. This configuration requires Requisitioners and Departmental Approvers, the shopper role is optional.*

*These rules can be:*

*All orders for your department.*

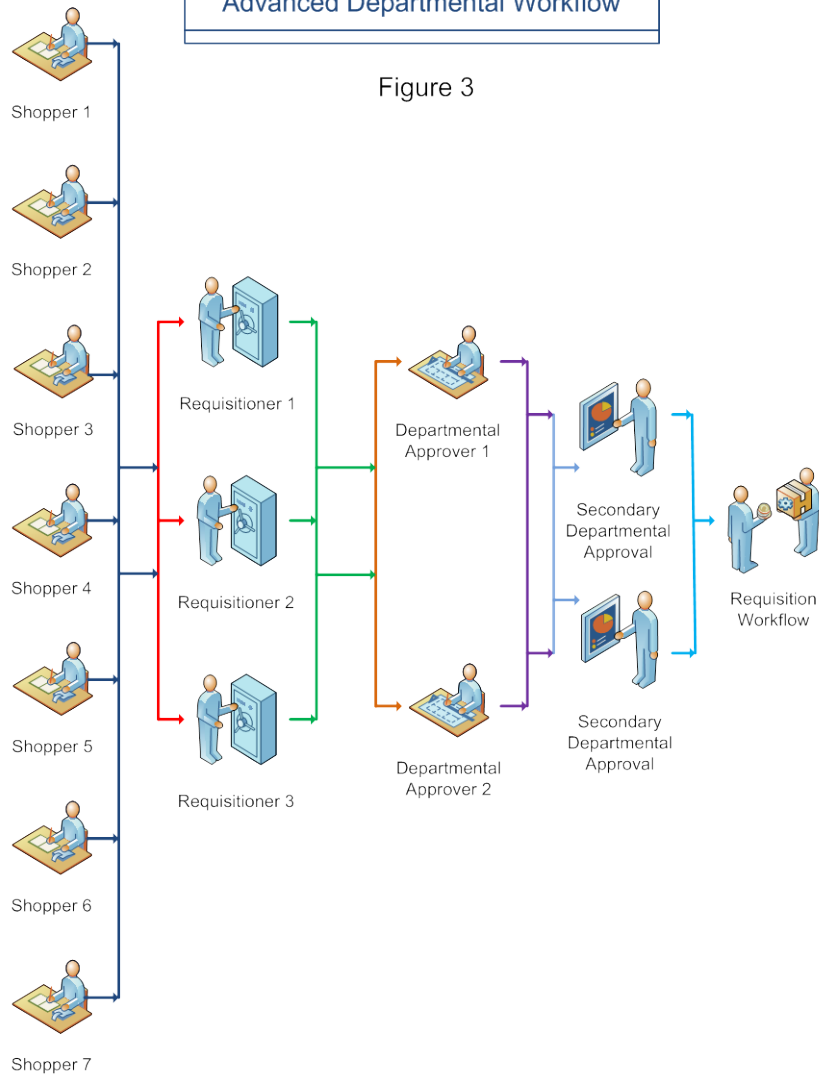
*Any order for your department that is over a specific dollar amount.*

*Any order for your department that is a capital asset.*

*Please indicate who the Approvers are. Please have more than one Approver. Departmental Approver rules will be discussed to ensure that they are operating correctly. Testing of these will be recommended.*

Advanced Departmental Workflow

Figure 3



**Advanced Configuration:**

*Please submit a list of users and their roles. This configuration requires, Requisitioners, Departmental Approvers and Secondary Departmental Approvers. Also please submit the rules or circumstances that will indicate how an order will stop for departmental approver. You will also need to specify the rules for the Secondary Departmental Approver. These rules can be all orders for your department. Any order for your department that is over a specific dollar amount. Any order for your department that is a capital asset. Please indicate who the Approvers are. Please have more than one approver. Please have more than one Secondary Departmental Approver. Departmental Approver rules will be discussed to ensure that they are operating correctly. Testing of these will be recommended.*