

# Husky Buy Purchasing Request Form

## Step 2 – Completing and Submitting Your Request Form

# Login to Husky Buy

- Login to Husky Buy from the Purchasing Department Website.  
<https://purchasing.ubs.uconn.edu/>
  - The login button is on the left hand side of the page in a blue box. After you click the login button, you'll be asked for your NetID and password.

The screenshot shows the University of Connecticut Purchasing Department website. At the top, there is a dark blue header with the text "UNIVERSITY BUSINESS SERVICES Purchasing Department" and a navigation menu with links for Home, About Us, Bid Opportunities, Procurement Card, Resources, Online Forms, and FAQs. Below the header, there are two green buttons: "UConn Travel Suspension FAQs" and "Emergency Purchase Procedure". The main content area features a large "UConn UNIVERSITY BUSINESS SERVICES PURCHASING" banner with a description of the department's role. To the right of the banner are four smaller images: "CONTRACTS", "PROCUREMENT", "FORMS", and "TRAINING". At the bottom left, there is a "HUSKYBUY UCONN" section with a blue "LOGIN" button and a red "JOB-AIDS" button. A large blue arrow points to the "LOGIN" button. To the right of this section is a "NEWS FLASH" section with the title "FY21 Blanket Order Procedure" and a date "Posted on April 9, 2020".

# Select the Form

Once logged into Husky Buy Home Page, click on the link for the Purchase Preapproval Request Form.

The screenshot displays the HuskyBuy UConn website interface. The top navigation bar includes the HuskyBuy logo, UConn branding, and utility links for search, currency (0.00 USD), and user account (2 items, 15 notifications). A search bar is set to 'Shop Everything'. Below the navigation, a 'Go to' section lists links for advanced search, favorites, forms, quick order, and browse options. The main content area is divided into three sections: 'Non-Catalog Requisition Forms', 'Internal Request Forms', and 'Research Suppliers'. The 'Non-Catalog Requisition Forms' section contains icons for Goods & Services, Blanket Order, External Catering, Disbursement Voucher, Equipment Request, and Software & IT Service. The 'Internal Request Forms' section contains icons for PCard Gift Card Preapproval, Shipping Address, and Purchase Preapproval Request. A blue callout bubble points to the 'Purchase Preapproval Request' icon with the text 'Click on the Purchase Preapproval Request Form icon.' The 'Research Suppliers' section lists logos for Airgas, BIO-RAD, Fisher Scientific, ThermoFisher Scientific, and QIAGEN.

# Form Instructions – Department Information

- Fill out your department, pre-approval, and budget source information
  - Note: for Budget Source, please list the KFS or Foundation account number to be used for the purchase



**Department Information**  
Fill out these questions about your department.

Department Requesting **\***

Art and Art History (1250) ▾

Request Has Pre-Approval **\*** ?

Yes  
 No  
 Own research/department/program funds

Purchase has been approved by authorized department head

Budget Source **\*** ?

1234567|

# Form Instructions – Department Head Approval/Supporting Budget Documents

Please attach any department head approval or supporting budget documents by clicking the 'Upload' button



Department head approval documentation

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*No File Attached*

*Uploaded attachment will be copied to the invoice.*



Supporting budget sheet documents

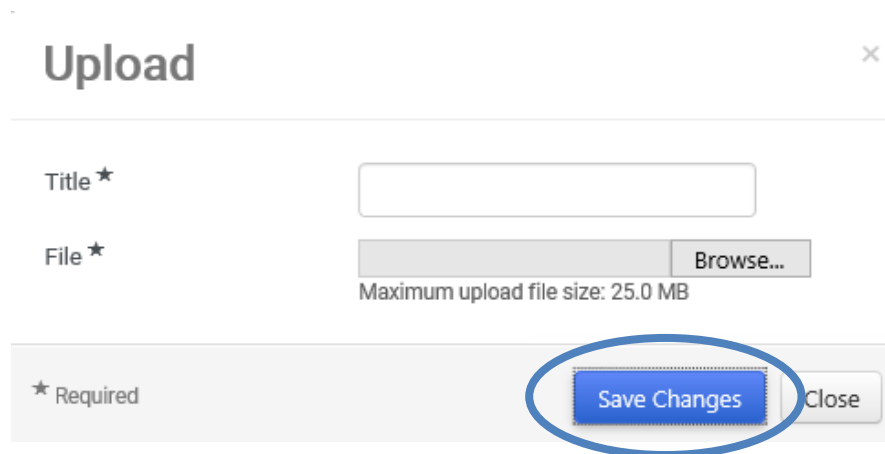
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*No File Attached*

*Uploaded attachment will be copied to the invoice.*

# Form Instructions – Uploading a file

After clicking 'Upload' a dialog box will appear where you can name and upload your attachment. Click '[Save Changes](#)' to save your file



The image shows a dialog box titled "Upload" with a close button (X) in the top right corner. Below the title bar, there are two required fields: "Title" and "File". The "Title" field is an empty text input box. The "File" field is a file selection area with a "Browse..." button to its right. Below the "File" field, it states "Maximum upload file size: 25.0 MB". At the bottom left of the dialog, there is a legend: "★ Required". At the bottom right, there are two buttons: "Save Changes" and "Close". The "Save Changes" button is highlighted with a blue oval.


# Form Instructions – Purchase Information

- Fill out your purchase information.
  - Note: Justification for purchase must include the following:
    1. Overview of the purchase
    2. Impact on students, teaching, research, or life/safety
    3. Alternatives considered



**Purchase Information**

Need by Date \* ⓘ

  
mm/dd/yyyy

Individual Purchase or Project Purchase \* ⓘ

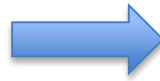
Justification for Purchase \* ⓘ

2000 characters remaining

Amount of Total Purchase Request \* ⓘ

# Form Instructions – Purchase/Supplier Information

- Select the category of your good or service.
  - Selecting certain values may require further information as described in the next slide.
- Fill out the supplier fields as applicable.



## Good or Services to be Purchased <sup>★</sup> ?

- Dues – Memberships or Equity
- Fees – Conference Registrations, Royalties, Shipping/Freight
- Furniture/Fixtures
- Rentals
- Professional Services
- Professional Printing (Non-UConn) – Attach quotes within Sourcing section
- Subscriptions
- Supplies
- IT Equipment/Software Licenses
- Non-IT Equipment
- UConn Services
- Transportation
- Other



## Supplier Information

### Supplier Name <sup>★</sup>

Adobe

### Supplier Phone Number

1-800-555-5555

### Supplier Email Address

creativecloud@adobe.com



# Form Instructions – Additional Information

- As noted on the previous slide, selecting certain values in the ‘Goods or Services to be Purchased’ section may require further information that will be displayed in an additional section of the form.

▼ **IT Equipment/Software Licenses**

Office or Room Number <sup>★</sup>

Type of Technology Purchase <sup>★</sup>

Computer     Scanner     Software  
 Office Printer     Display     Other

For instance, selecting IT Equipment/Software licenses will require more information pertaining to future location of equipment and type of technology being purchased.

Another example is a Professional Printing request, which requires three quotes before the purchase can be made. Interactively, the form will display attachment fields for uploading the required quotes.

▼ **Printing Quotes**

Professional Printing requires 3 quotes. Accepted file types pdf, docx, doc, jpg, png

Quote 1 <sup>★</sup>

No File Attached  
  
Uploaded attachment will be copied to the invoice.

Quote 2 <sup>★</sup>

No File Attached  
  
Uploaded attachment will be copied to the invoice.

Quote 3 <sup>★</sup>

No File Attached  
  
Uploaded attachment will be copied to the invoice.

# Form Instructions – Dollar Threshold Over/Under \$10,000

- Select the dollar threshold for your purchase.

▼ **Dollar Threshold**

Choose appropriate dollar amount.

Please Select the Sourcing Dollar Threshold ★ ?

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Regular Purchase Over 10k

Regular Purchase Under 10k

Sole Source Justification (SSJ)

# Form Instructions – Dollar Threshold – Over/Under \$10,000

- ✓ If your purchase is under \$10,000 please include a direct link to the items requested, or upload the quote you received from the vendor. If providing a link, please give the link to the specific item needed.

- Regular Purchase Over 10k
- Regular Purchase Under 10k
- Sole Source Justification (SSJ)

Please provide a direct link to specific item(s) or attach quotes(s) below.

2000 characters remaining

Add Attachment

*No File Attached*

Upload

*Uploaded attachment will be copied to the invoice.*

# Form Instructions – Dollar Threshold – Over/Under \$10,000

✓ If your purchase is over \$10,000 and not with a contracted vendor, three quotes are required.

- If using a contracted vendor, please only submit the one quote. **If you are unsure if your vendor is on contract, reach out to your SFA Financial Services contact for assistance.**

*Note: If your purchase is for printing or buses, three quotes are required, regardless of price.*

- Regular Purchase Over 10k
- Regular Purchase Under 10k
- Sole Source Justification (SSJ)

## Over \$10,000 Quotes

### Quote 1 ★

No File Attached

Upload

*Uploaded attachment will be copied to the invoice.*

### Quote 2 ★

No File Attached

Upload

*Uploaded attachment will be copied to the invoice.*

### Quote 3 ★

No File Attached

Upload

*Uploaded attachment will be copied to the invoice.*

# Form Instructions – Dollar Threshold - Sole Source Justification

- ✓ If you are requesting an exemption to competitive bidding laws/requirements, a Sole Source Justification form will need to be completed and uploaded.
  - **Please reach out to your SFA Financial Services Office contact for further assistance.**

- Regular Purchase Over 10k
- Regular Purchase Under 10k
- Sole Source Justification (SSJ)

#### Download Sole Source

If needed, please download the [Sole Source Form](#). Fill out the form and upload it here.

Upload Sole Source Form

No File Attached

Upload

Uploaded attachment will be copied to the invoice.

# Form Instructions – Review and Submit

- Once you reach the last section, 'Required Fields Complete' will be shown if everything is complete and ready to be submitted.
- Click the 'Submit' button to send your request for approvals.

**Review and Submit** Request Actions History ?

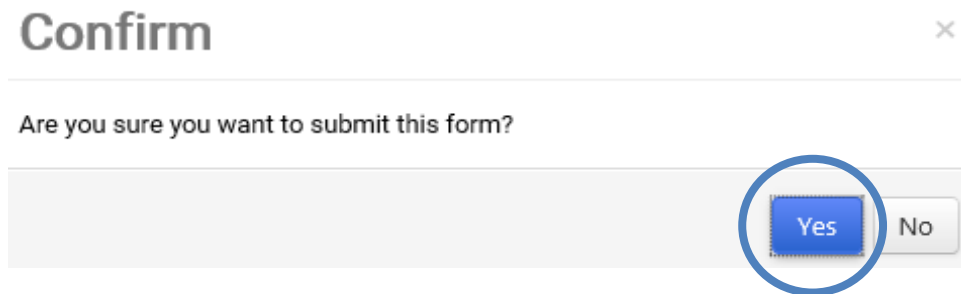
✓ Required Fields Complete

Section	Progress
<a href="#">Questions</a>	✓ Required Fields Complete

< Previous   Add to Favorites   **Submit**

# Form Instructions – Confirmation

A dialog box will appear to confirm submission, click 'No' if you'd like to make additional edits. Click 'Yes' to submit the form.



# Need Help?

## SFA Financial Services Office

### Academic Units

- James Ouellette – Fiscal Manager  
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- Karen Strobel – Financial Assistant  
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### Performing and Exhibiting Units

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