Support
(860) 486-2BUY (2289)
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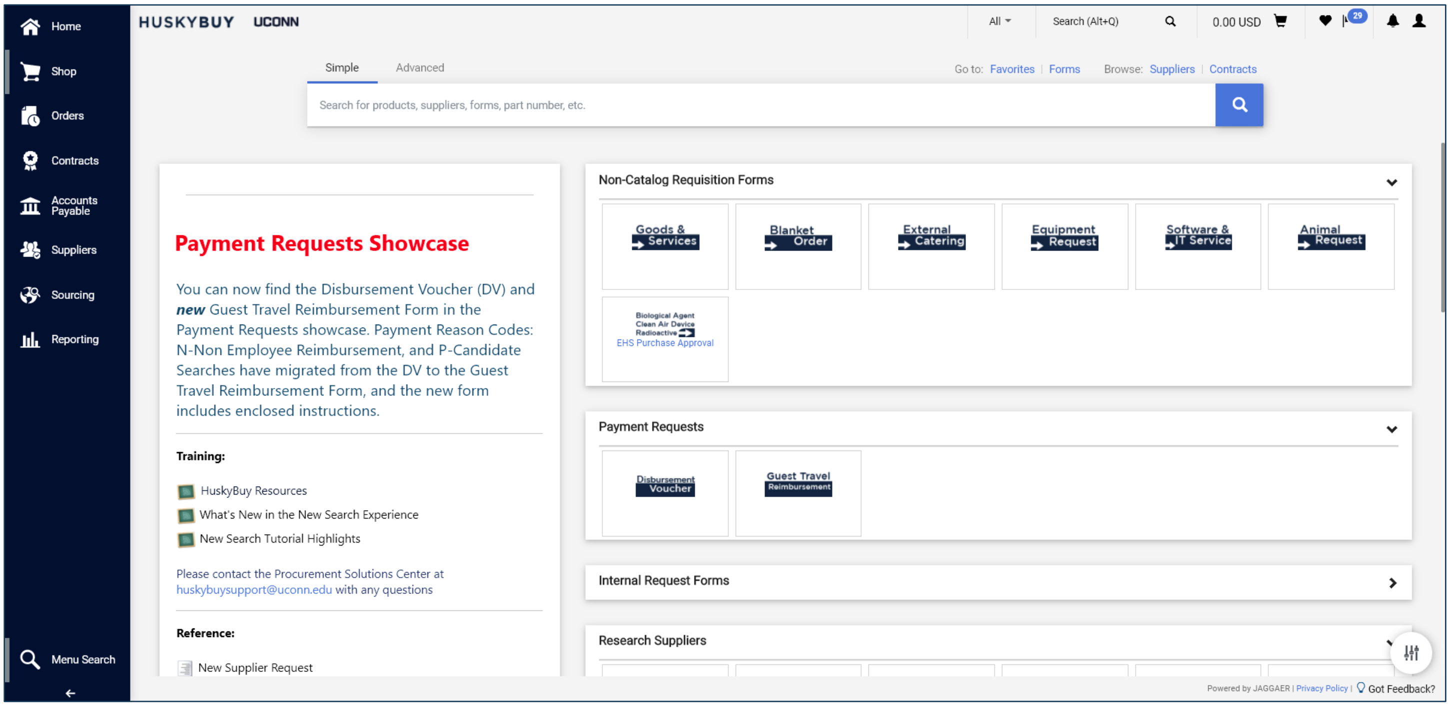
HuskyBuy User's Guide

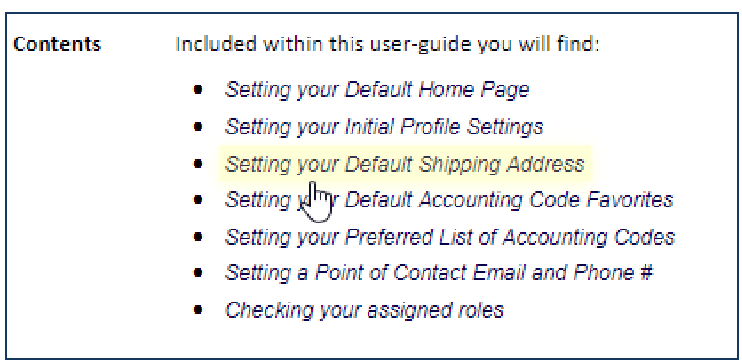


Welcome to HuskyBuy!

This User's Guide is a collection of all the individual Job-Aid documents. If desired, this can be printed out as a double-sided document for reference. The Table of Contents below gives an outline (including page numbers) of everything that has been written so far.

Additionally, each Job-Aid has a **Contents** section on the first page that shows each section within that document. This is also a link to take you straight to that section in the document

We hope that you find these Job-Aids helpful. Our intention is to continue adding sections, as well as some videos to make your HuskyBuy experience even better. Get access to all documents and videos at the HuskyBuy website here. (You will need to login with your UConn NetID and password.)


Contents Included within this user-guide you will find:

- *Setting your Default Home Page*
- *Setting your Initial Profile Settings*
- *Setting your Default Shipping Address*
- *Setting your Default Accounting Code Favorites*
- *Setting your Preferred List of Accounting Codes*
- *Setting a Point of Contact Email and Phone #*
- *Checking your assigned roles*

Document Control

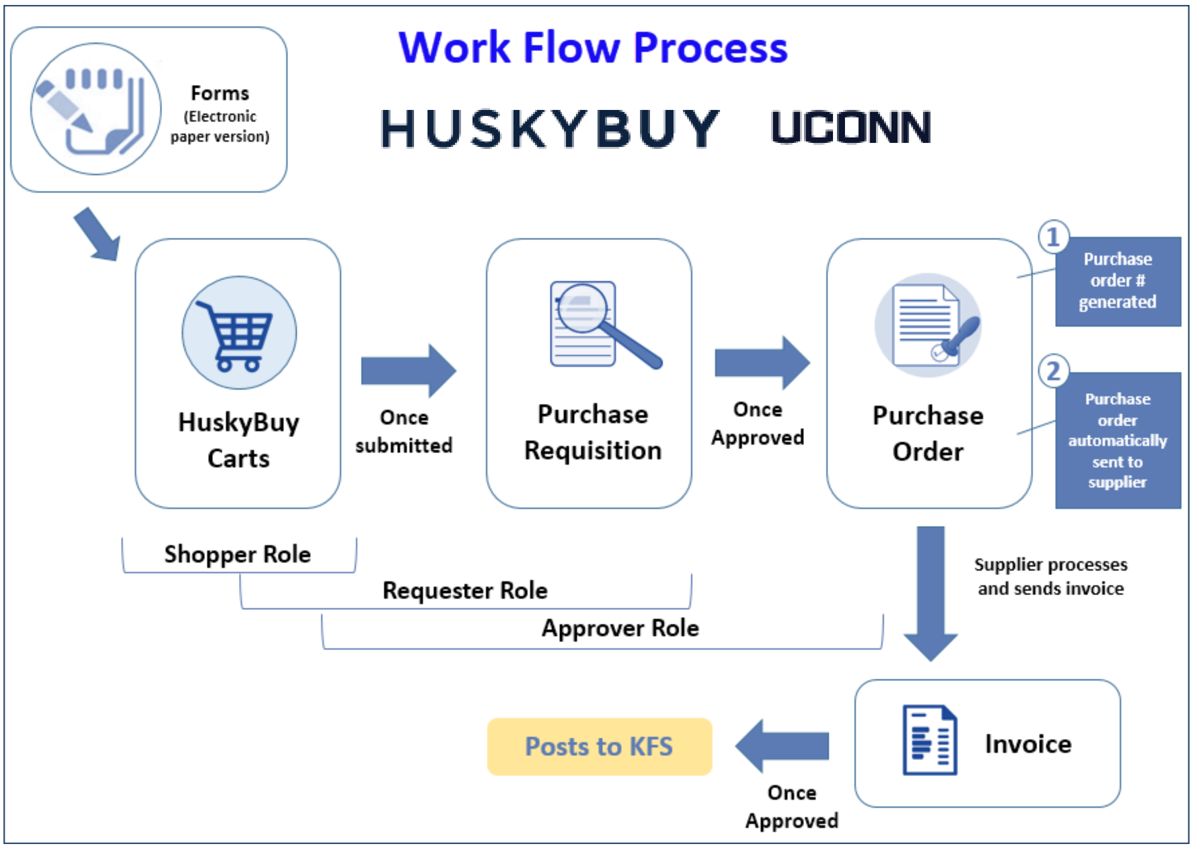
Document		
Document Name:	HuskyBuy_Complete_User's_Guide	Version: 3.8
Originator:	Mick Stevens	Status: Released

History

Version	Modified By	Date	Description
1.0	Amber Boccetti	03/05/2018	Draft
2.0	Mick Stevens	06/27/2018	Initial release of this document and the 22 Job-Aids it represents.
2.1	Mick Stevens	07/02/2018	Added Job-Aid, 4.2-HUSKYBUY_user-guide_Purchase Order Amendments, and included the support line info to the header.
2.1	Mick Stevens	07/10/2018	Modified Job-Aids 4.2 and 8.3.
3.0	Mick Stevens	07/16/2018	Re-ordered the Job-Aids to match up with the Procurement website <and> Added two Job-Aids (4.1 & 4.2) for ordering chemicals and Airgas.
3.1	Mick Stevens	09/14/2018	Updated Job-Aid 2.2 to include the new changes to the Goods and Services form. (Ability to add 50 lines to a requisition.) Also added links to the Job-Aids that had “Related Job-Aids” and updated the commodity codes in job-aids 6.1 & 6.2.
3.2	Mick Stevens	09/18/2018	Added Job-Aid 3.5 (Returned Requisitions) to the list, and added a note to Job-Aid 2.2 about adding attachments on a form.
3.3	Mick Stevens	09/20/2018	Added Job-Aid 2.3 (Blanket Order Forms) to the list and reset the page numbers for that section. Also added the User Guide Name to the Header of all the files to help when looking at the complete User Guide.
3.4	Mick Stevens	10/04/2018	Updated Job-Aids 2.2, 3.2, 3.3, and 5.2 to include information about quantity on forms, adding an Optional PR Approver, and excluding DVs from POAs.
3.5	Jeremiah Macht	12/7/2018	Adding Job-Aid 5.3-HuskyBuy_UG_Strategies for Splitting Line Items.
3.6	Jeremiah Macht	8/18/20	Adding Job-Aid 3.6-HuskyBuy_UG_Ethyl Alcohol Purchases.
3.7	Jeremiah Macht	8/18/20	Adding Job-Aid 3.7-HuskyBuy_UG_Copy Requisition.
3.8	Jeremiah Macht	7/19/21	Jaggaer’s new user interface

Table of Contents

The HuskyBuy Work Flow Process Chart



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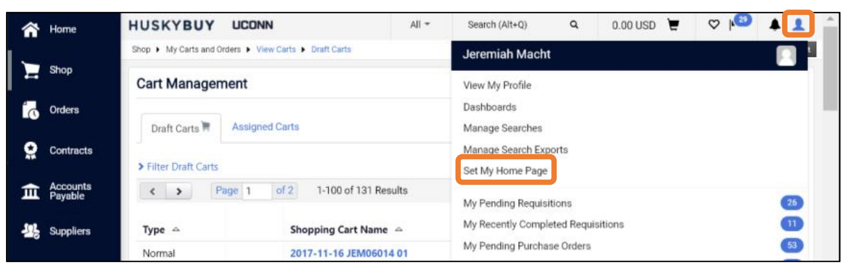
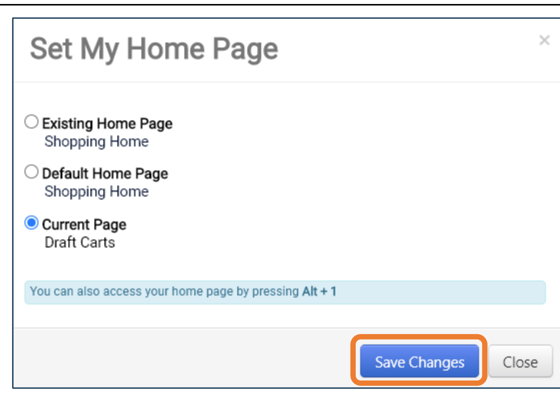
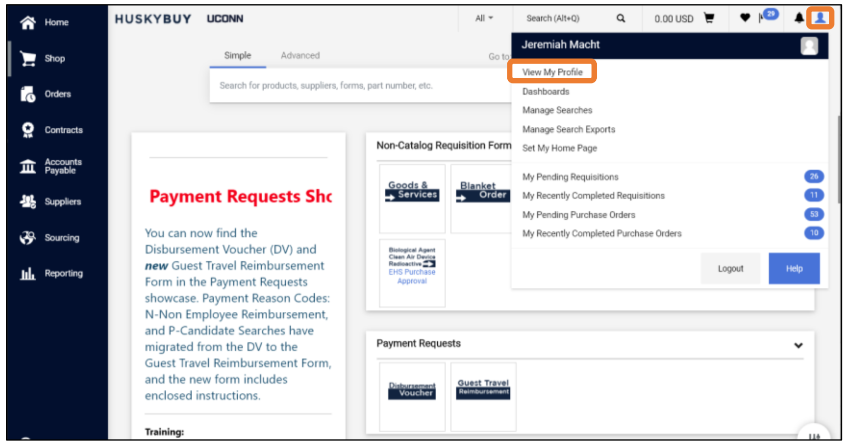
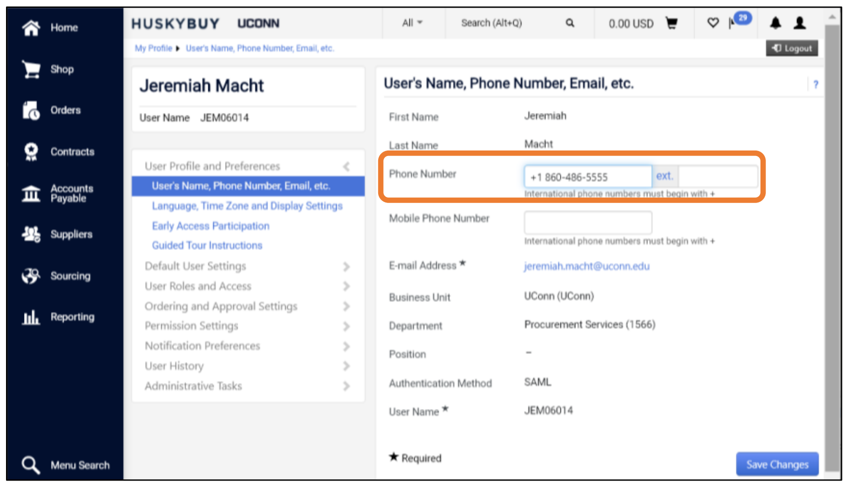
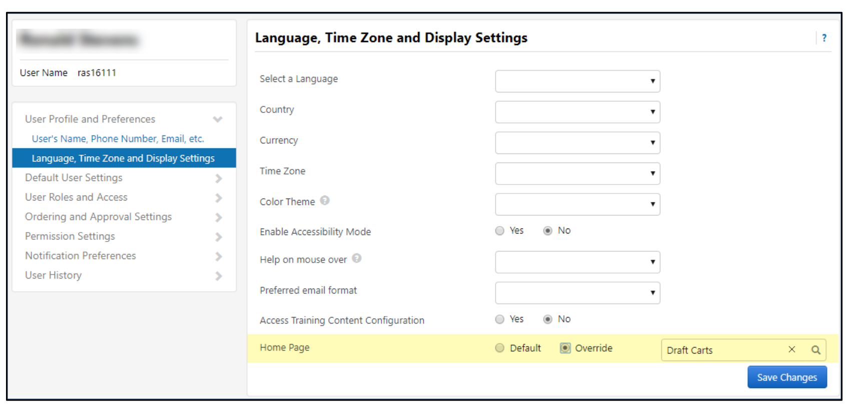
Setting Your Profile Preferences

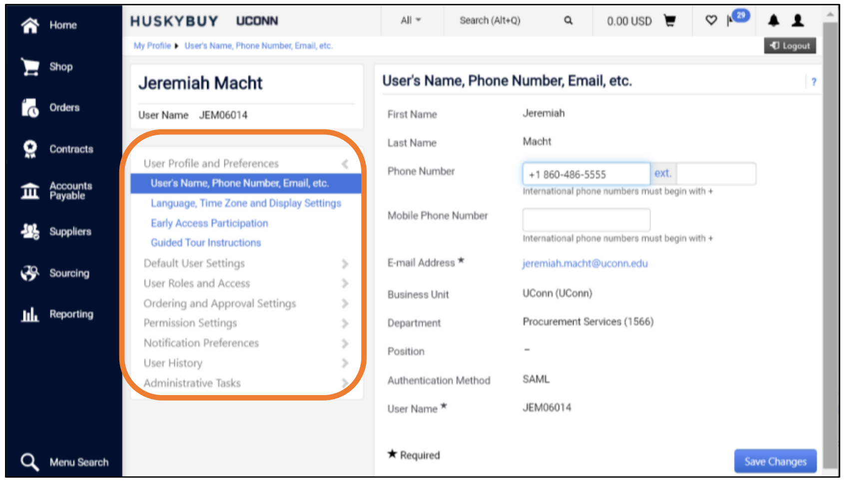
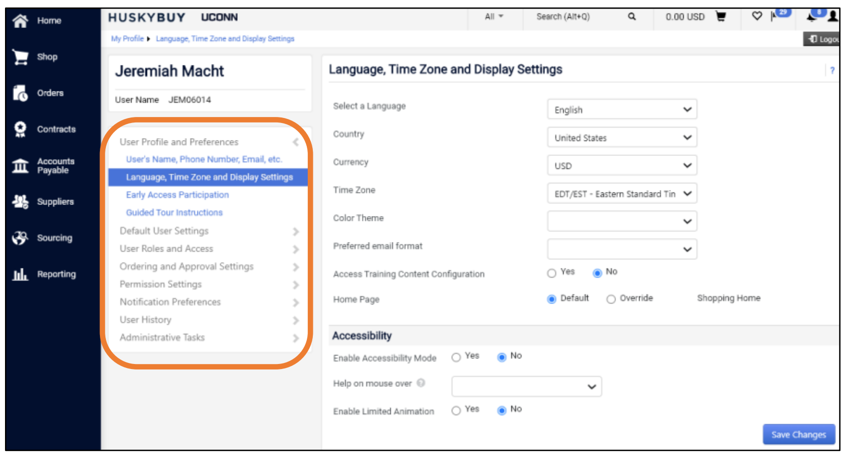
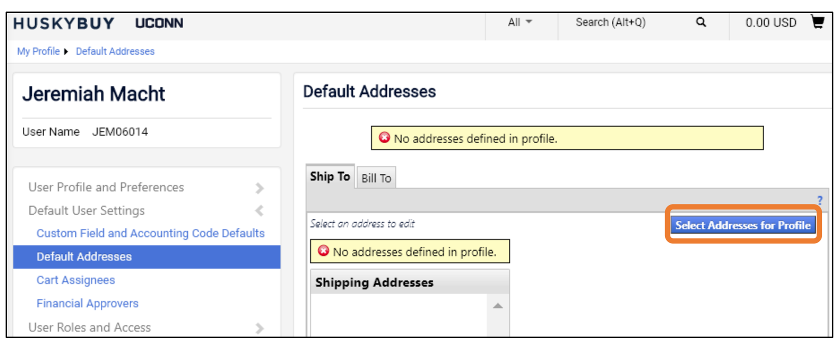
Overview Within HuskyBuy you can adjust your profile settings to set default accounting codes and shipping addresses for shopping; setup how you want to receive notifications, or if you want to receive them at all. Although it is not technically a profile setting, we will even show you how to setup a new Home page.

Contents Included within this user-guide you will find:

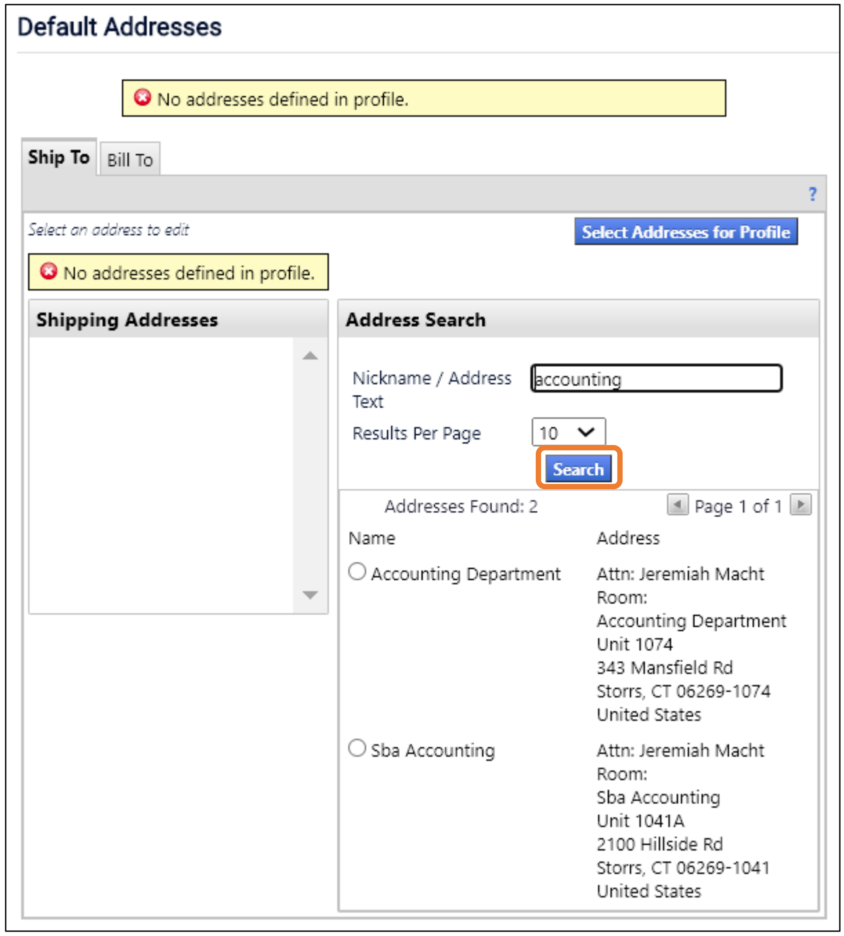
Process Steps:

Step	Action	Screenshot
Setting Your Default Home Page		
1	The Home page for all users is set to the Shopping Home page by default. To change that, navigate to the page you to set as default. (Here I went to **Shop > My Carts and Orders > View Carts**.) Click on your profile icon in the upper right section of the page and select, **Set My Home Page**.	
2	In the pop-up menu, ensure **Current Page** is selected and click **Save Changes**.	

Step	Action	Screenshot
Setting Your Initial Profile Settings		
1	Click on your profile icon in the upper right section of the page and select, **View My Profile** In the pop-up menu.	
2	You will be brought to the **User's Name, Phone Number, Email, etc.** section of your profile. If the Phone Number is blank, **please enter your phone number here**. **Note:** The first time you login to HuskyBuy, your Email Address will be linked to your NetID (User Name).	
3	Select **Language, Time Zone and Display Settings** on the left and fill out all of the pertinent information in this section. Click **Save Changes** when done. Notice that you can reset your Home page to the default page here also.	

Step	Action	Screenshot
4	Use the menu on the left to review all your profile information. • **User Profile and Preferences** – is where you set your regional location and contact information. • **Default User Settings** – is where you can set your default accounting codes and shipping address information. • **User Roles and Access** – is where you can see the roles assigned to you. • **Ordering and Approval Settings** – shows your purchasing and approval limit values.	
5	Continue with your profile information. • **Permission Settings** – shows your permissions for functions related to shopping, carts & requisitions, orders, and other things depending on your role. • **Notification Preferences** – shows your HuskyBuy notification preferences. You may update your notification preferences as desired. • **User History** – Here you can see all the changes you ever made to your user profile.	
Setting Your Default Shipping Address		
1	To add a default shipping address, click **Default User Settings** > **Default Addresses**. Here you can add your shipping addresses or review/edit an existing address. If this is your first time here, you might not have a Ship-To address yet. Click on **Select Addresses for Profile** to search for a new one.	

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>2</td><td>Enter a search term for your address and click Search. It can be a department or any part of the address.

Select an address from the list and the information will populate as shown below.</td><td>
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>3</td><td>

The address is displayed and most of the fields are populated. Four of the fields can be changed.

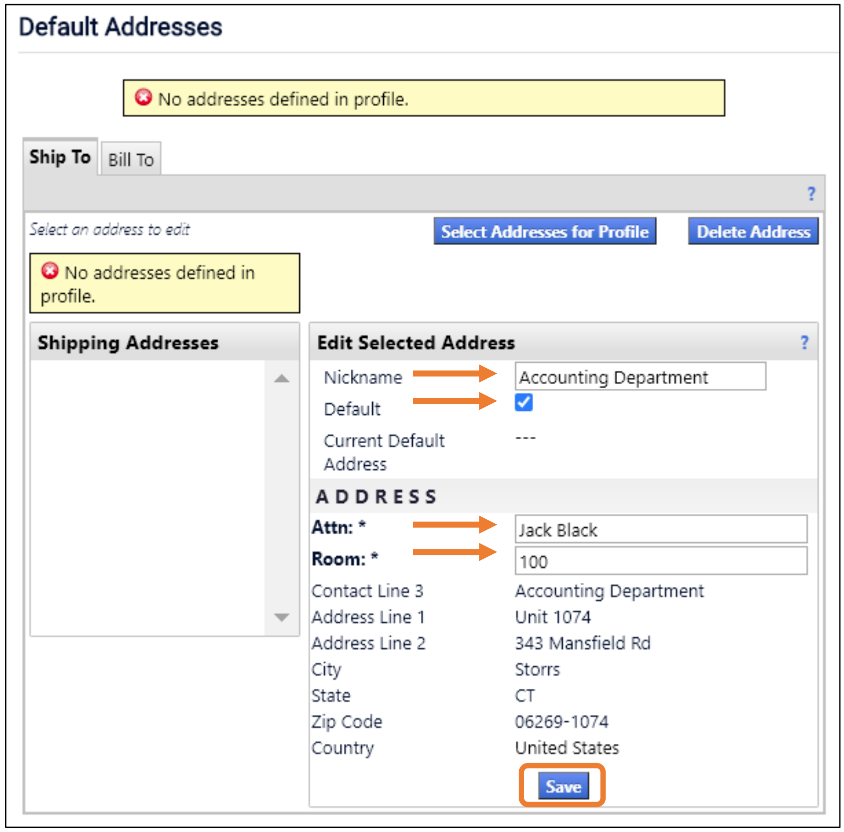
- **Nickname**: Can be changed if desired.
- **Default:** This checkbox is automatically set for the first address added.
- **Attn:** Your name is added by default but can be changed here.
- **Room:** This is a required field but is left blank initially.

Add a Room number *here (even if you do not have one)*.

Click **Save** when done.

Note: Failure to add a room number will force you to always add one on a Purchase Requisition.

</td><td>



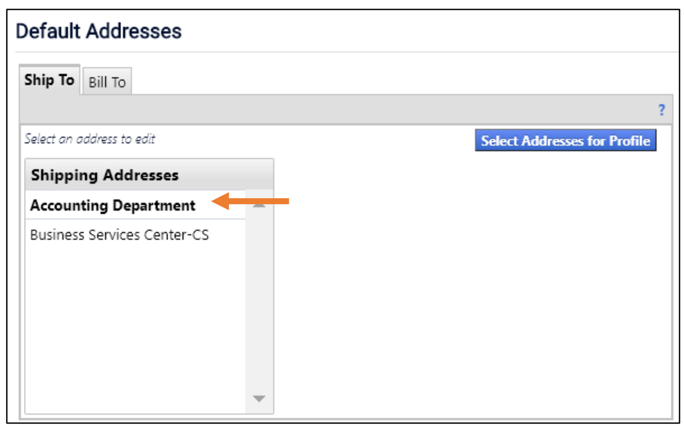
</td></tr>
<tr><td>4</td><td>

Repeat the above steps to add as many Ship-To addresses as you need.

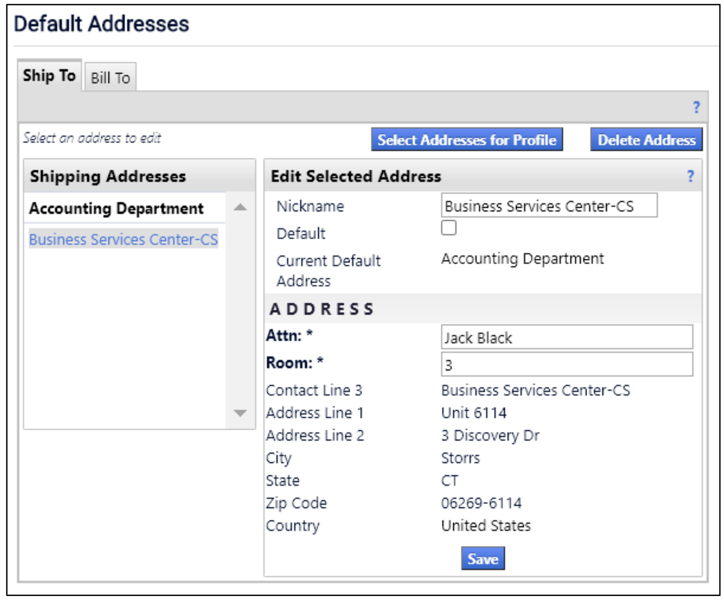
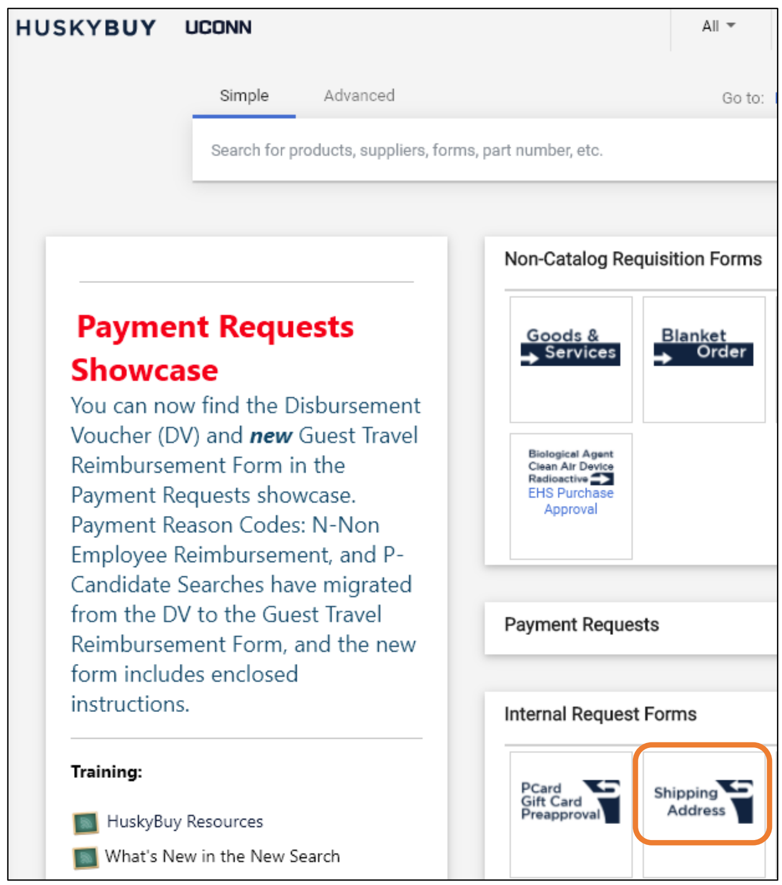
The other addresses will be available in the dropdown selection of the requisition.

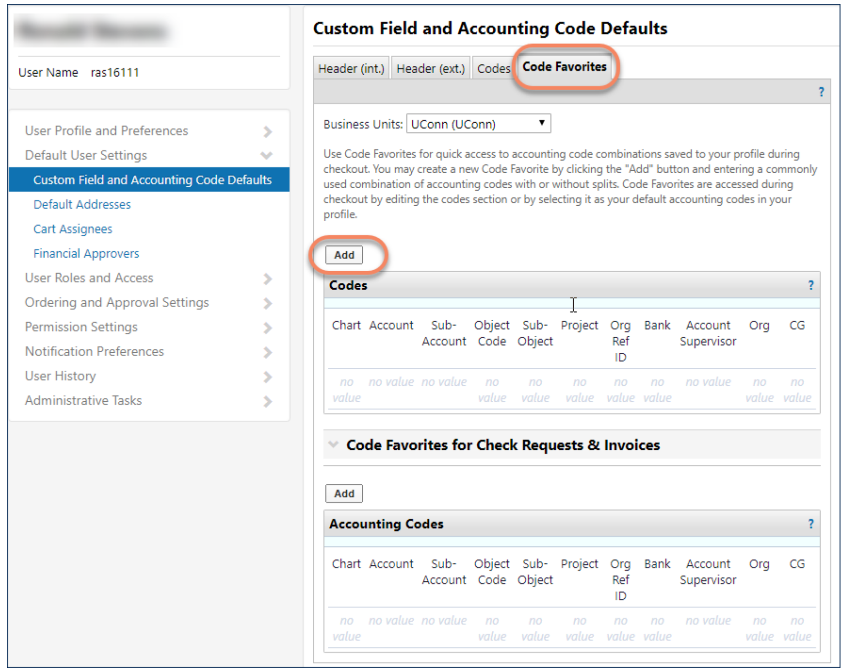
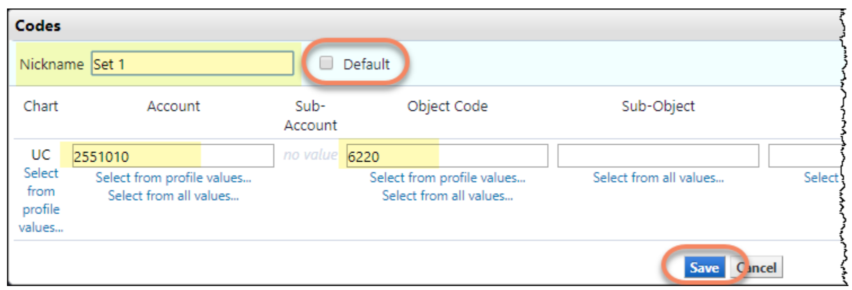
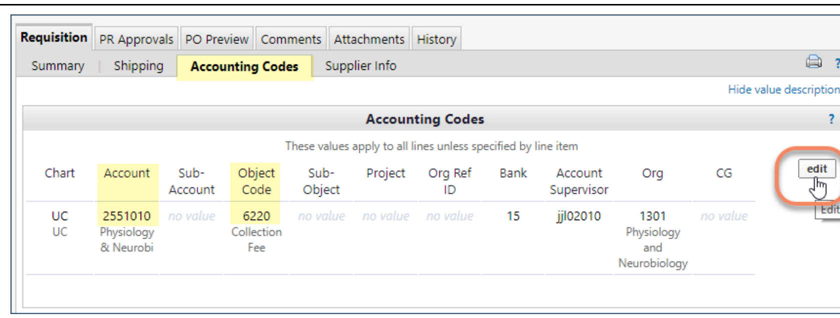
Note: The **BOLD** font indicates your default ship to address.

</td><td>



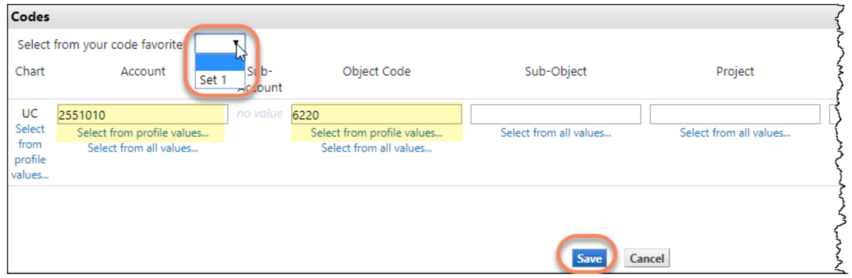
</td></tr>
</table>

Step	Action	Screenshot
5	Click on the address to see the details or to make edits. Click the Default check-box for the one you will use most often. Click the **Save** button to save your edits. You can also delete addresses by selecting them and clicking on the **Delete Address** button.	
6	If your address has changed, or it does not exist in KFS, you will not find it in your search. New addresses can be added to KFS by filling out the **Shipping Address** Form on the Home Shopping page of HuskyBuy, located in the Internal Request Forms section. Click on the **Shipping Address** Form, fill it out, and submit it. You will be notified when it is in KFS.	

Step	Action	Screenshot
Setting Your Default Accounting Code Favorites		
1	If you will be using certain combinations of Account and Object Codes, click on **Default User Settings** > **Custom Field and Accounting Code Defaults**. Click on the **Code Favorites** tab and select **Add**.	
2	Enter any commonly used combination of accounting codes with or without splits. Give it a Nickname and check whether these will be your default codes or not. Click **Save** when done You can add as many sets of codes that you need. These are accessed during checkout by editing the codes section or by selecting them as your default here.	
3	The above setting was saved as Default and named **Set 1**. This will be the default set of codes used on a Purchase Requisition (PR). As you can see here, the accounting codes are added to this PR. If we had saved multiple sets of codes, they could also be selected by clicking on the **Edit** button.	

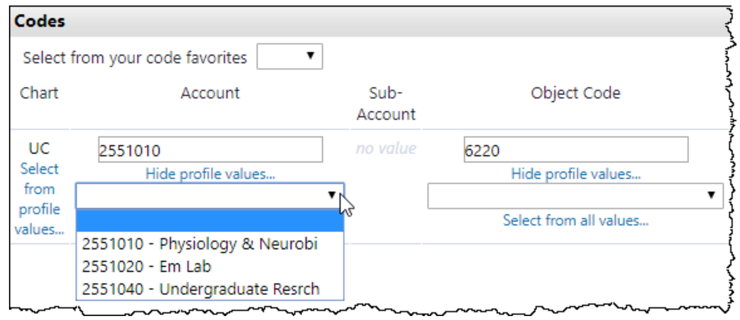
<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>4</td><td>
In the popup that appears, you can select from you list of code favorites here.

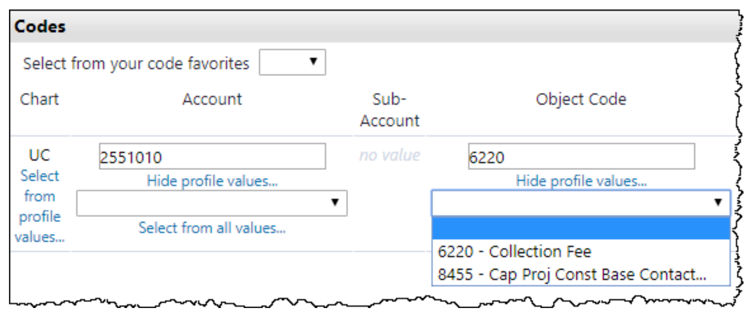
(There is only one in the display, but others would be listed here if you created them.)

You can also change the Account number and Object Code directly, if you know what they are.
</td><td>


</td></tr>
<tr><td>5</td><td>
If you have a list of preferred codes set up for your department, you can access that list by clicking the link, **Select from profile values…** under the Account number and Object Codes.

Clicking the link will display a drop-down box with the preferred codes you have setup in your profile.

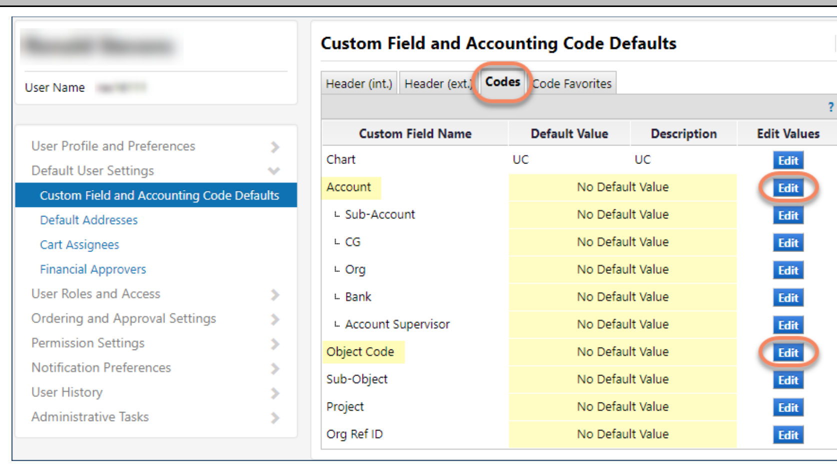
The next section will show you how to set up this preferred list of codes in your profile.
</td><td>




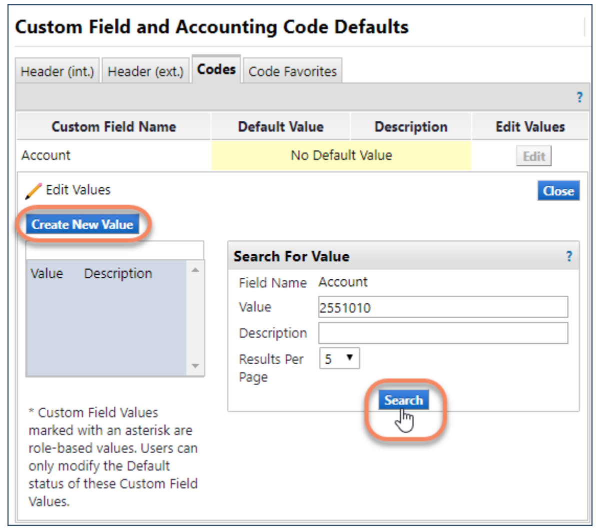
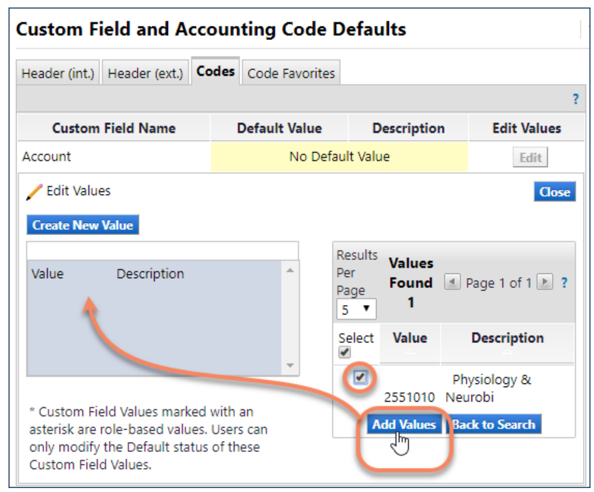
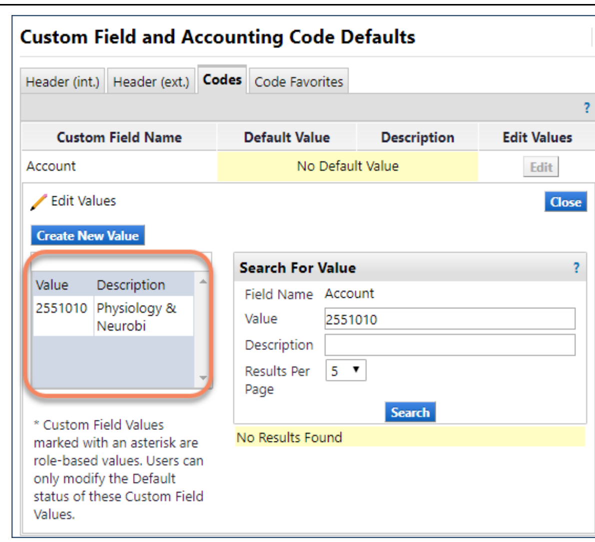
</td></tr>
<tr><td colspan="3">Setting Your Preferred List of Accounting Codes</td></tr>
<tr><td>1</td><td>
Back in your profile, go to your **Default User Settings** > **Custom Field and Accounting Code Defaults** again.

Click on the **Code** tab this time.

We will be adding a preferred list of Accounts and Object Codes that we will have access to in our Purchase Requisitions. Here are the steps.

Click on the **Edit** button for the Account.
</td><td>


</td></tr>
</table>

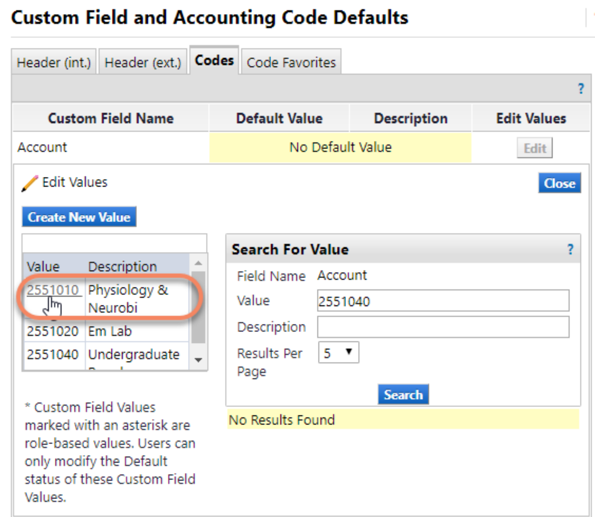
Step	Action	Screenshot
2	Click on the **Create New Value** button to get the **Search For Value** box. Enter a value or a description and click **Search**. *(Partial values will work and wildcards are not needed.)*	
3	Select the correct number from the list by clicking in the check-box and click on the **Add Values** button. The selected account number(s) will be added to the box on the left side. If there were multiple numbers in the search, you could select any or all of them to be added to the list.	
4	We have just added our first account number to our preferred list. To speed things along, I will repeat steps 2 & 3 to add two more account numbers to the list.	

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>5</td><td>

Now I have 3 numbers in the list.

Choose the Account Number that you want as a Default and click on it.

</td><td>

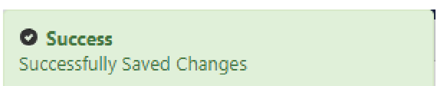


</td></tr>
<tr><td>6</td><td>

Select the **Default** check-box.

Click **Save**.

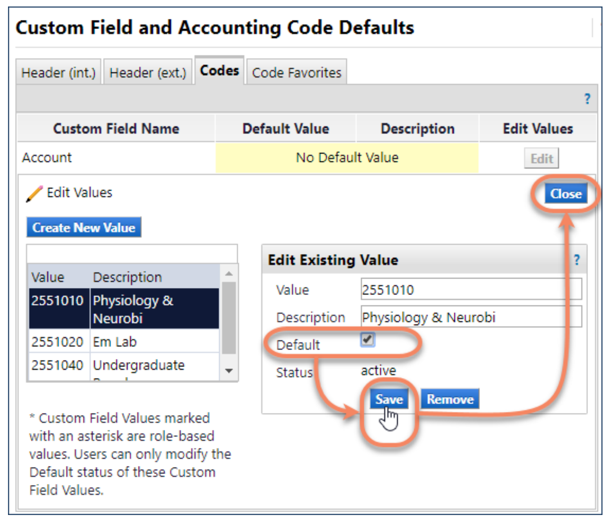
A popup message will appear if there were no problems.



And **Close** the window.

Notice the **Remove** button.

</td><td>

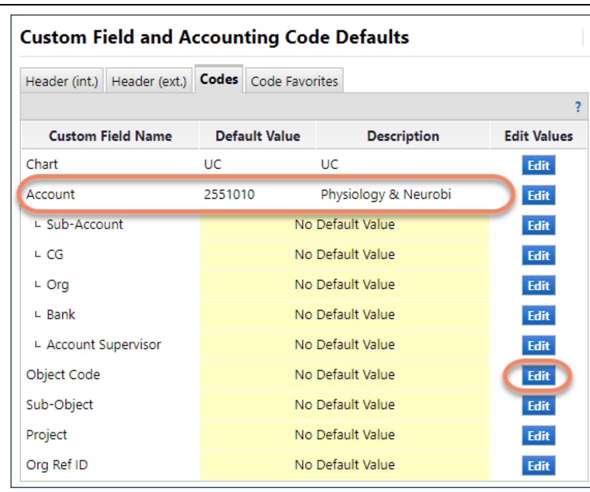


</td></tr>
<tr><td>7</td><td>

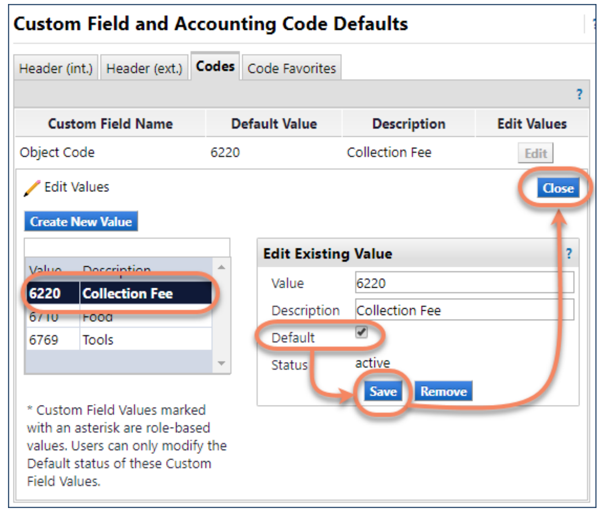
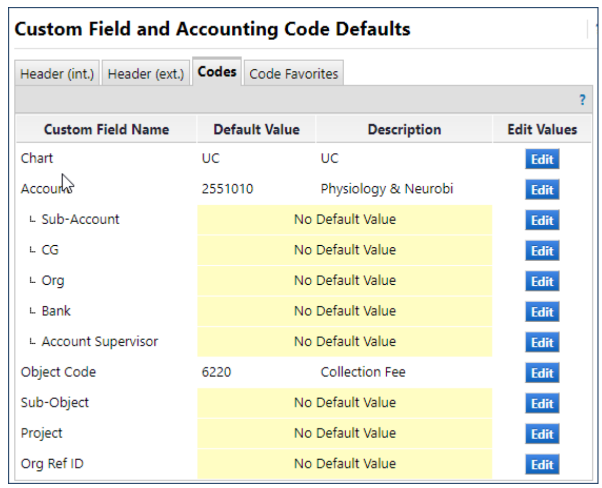
The Default account is the only account number shown on this page.

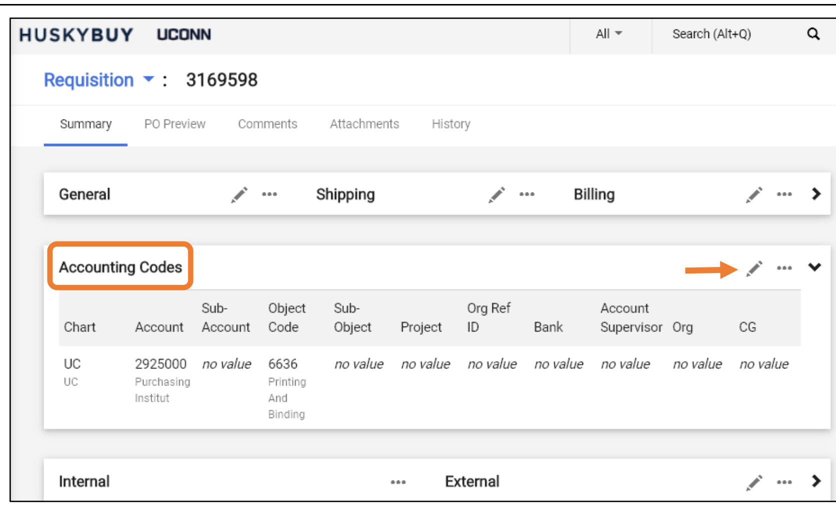
Follow the exact same steps for adding the Object Codes, or any of the other codes on the page.

</td><td>

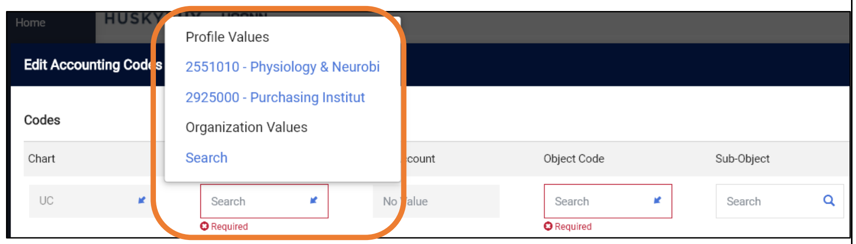


</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>8</td><td>Added the Object Codes.
Set the Default.
Saved.
And closed the window.</td><td>
</td></tr>
<tr><td>9</td><td>Only the Default values show up on this page.</td><td>
</td></tr>
<tr><td>10</td><td>Now when you edit the Accounting Codes in a Purchase Requisition…

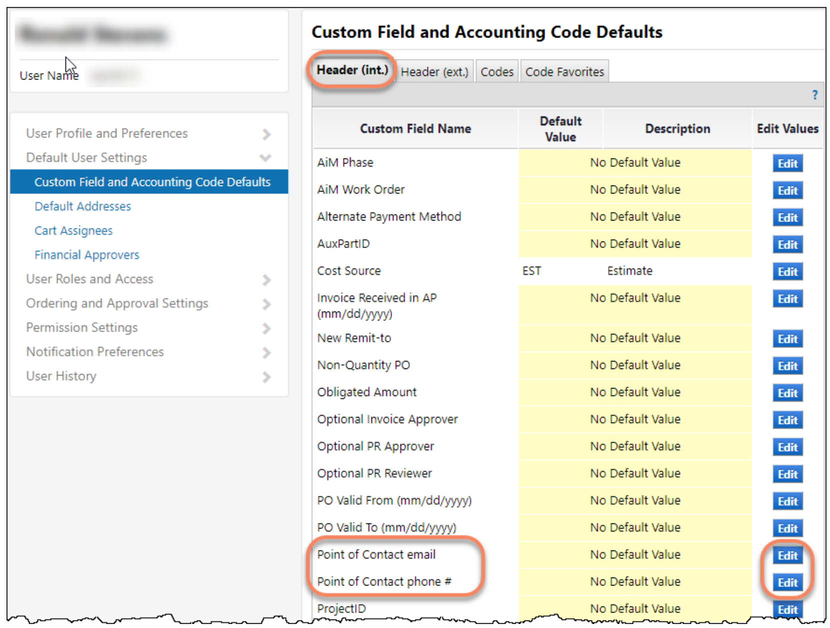
Note: There is NO Accounting Codes tab at the top in this user interface. You will need to look below the General section.
Note: The Edit button in this user interface is denoted as a pencil icon.
</td><td>
</td></tr>
</table>

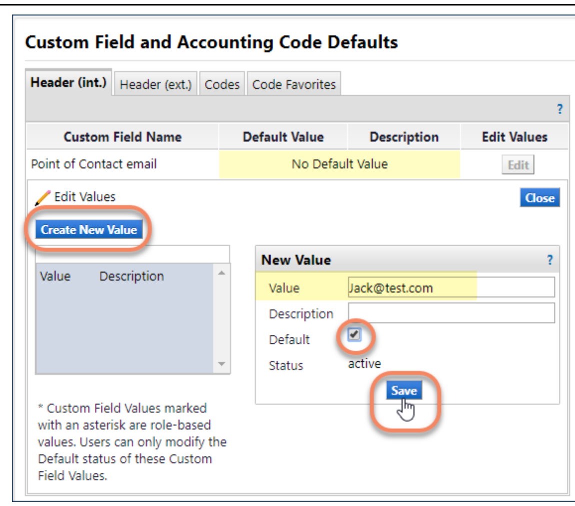
<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>11</td><td>… and click on the Search Field Arrow in the Account number or Object Code fields, you will see your default code Profile Values preferred list.

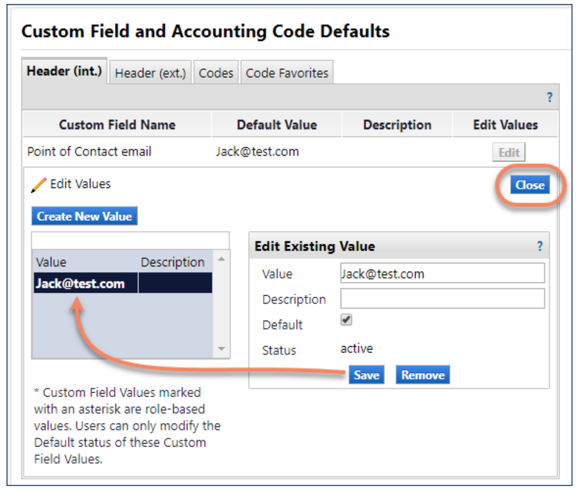
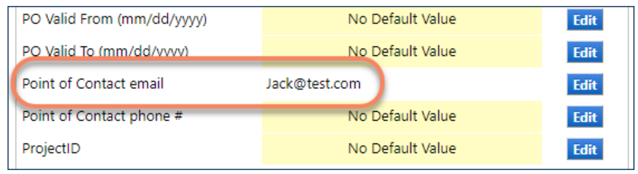
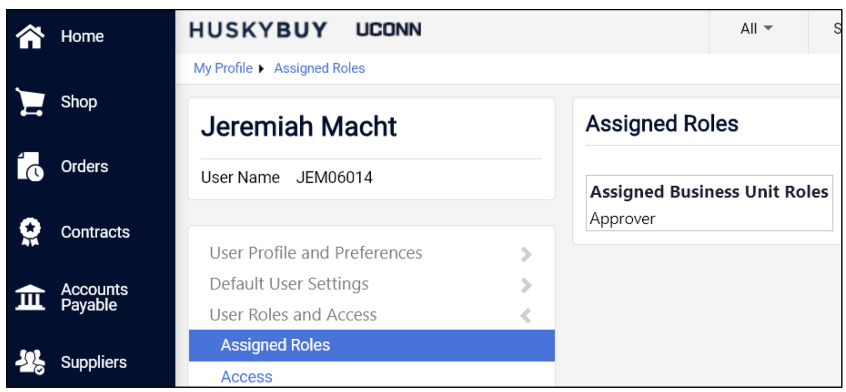
Note: The account fields have either an arrow or a magnifying glass.
= Code Default Present
= Search for Code</td><td>
</td></tr>
<tr><td colspan="3">Setting a Point of Contact Email and Phone #</td></tr>
<tr><td>1</td><td>Back in your profile, go to your Default User Settings > Custom Field and Accounting Code Defaults again.

Click on the Header (int.) tab this time.

A Point of Contact email and phone number can be set here. The procedure for setting both of these is identical. Here are the steps.

Click on the Edit button for Point of Contact email (or phone #).</td><td>
</td></tr>
<tr><td>2</td><td>Click on the Create New Value button to get the New Value box.

Enter the email address (or phone number) in the Value field and select the Default check-box if it will be the default. Click Save.</td><td>
</td></tr>
</table>

Step	Action	Screenshot
3	The email address (or phone number) is added to the list on the left. Click on the **Create New Value** button to add more email addresses to be available in a drop-down selection list. Click the **Close** button when done.	
4	Repeat steps 1 – 3 to add a Point of Contact phone number.	
Checking Your Assigned Roles		
1	Click on **User Roles and Access > Assigned Roles** to see the roles that have been assigned to you.	

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HUSKYBUY UCONN

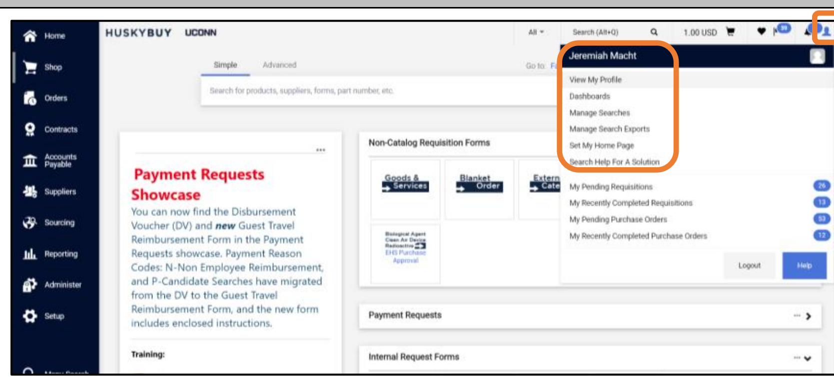
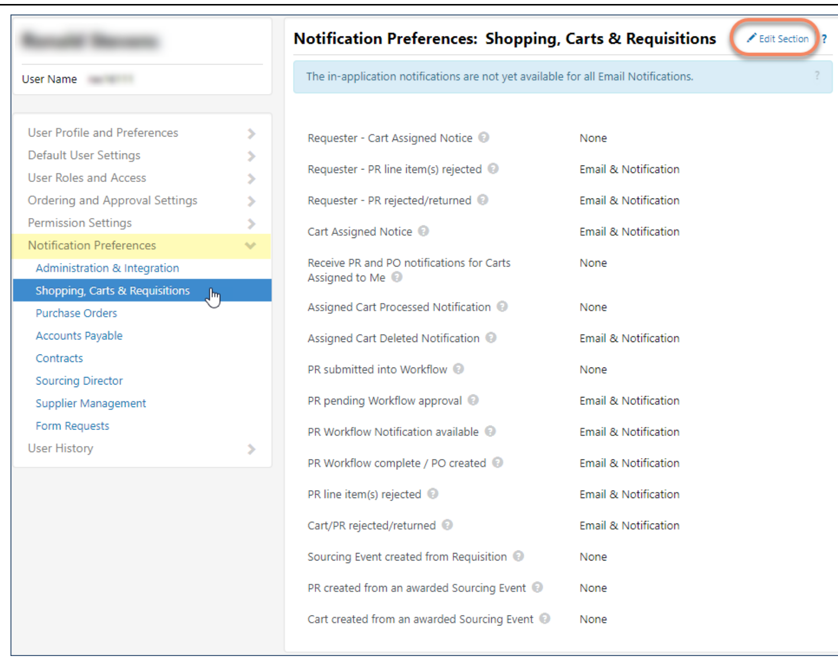
Setting your Notification Preferences

Support
(860) 486-2BUY (2289)
HuskyBuySupport@UConn.edu

Overview Everyone's notification preferences have been setup to common defaults based on your role.

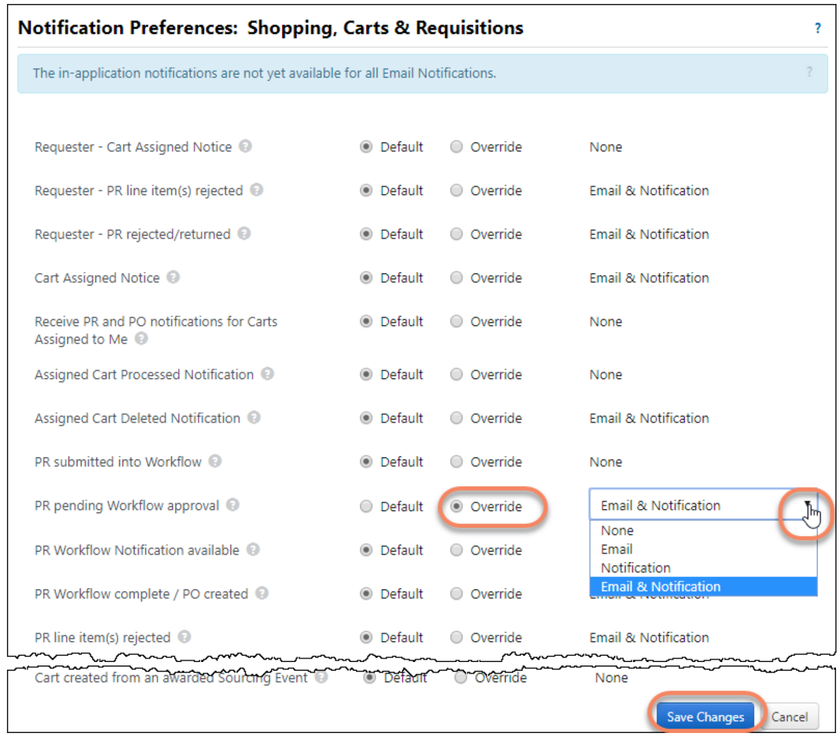
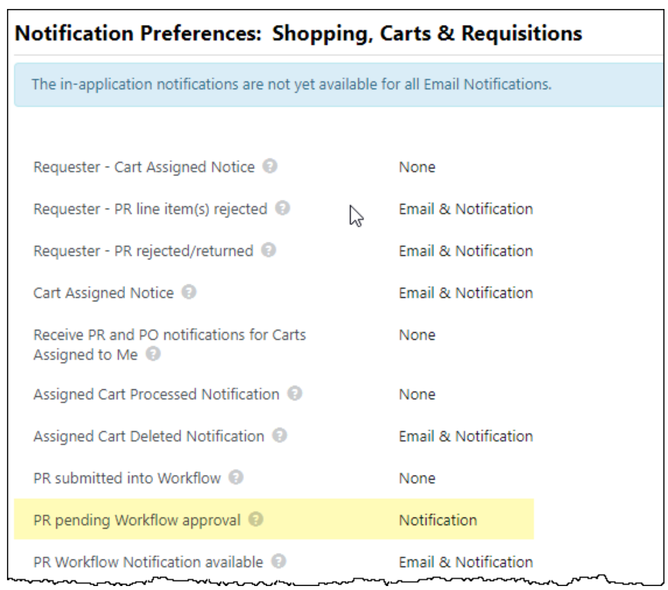
Contents Included within this user-guide you will find:

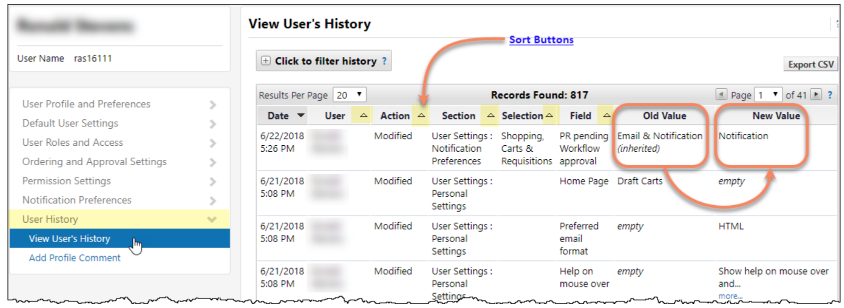
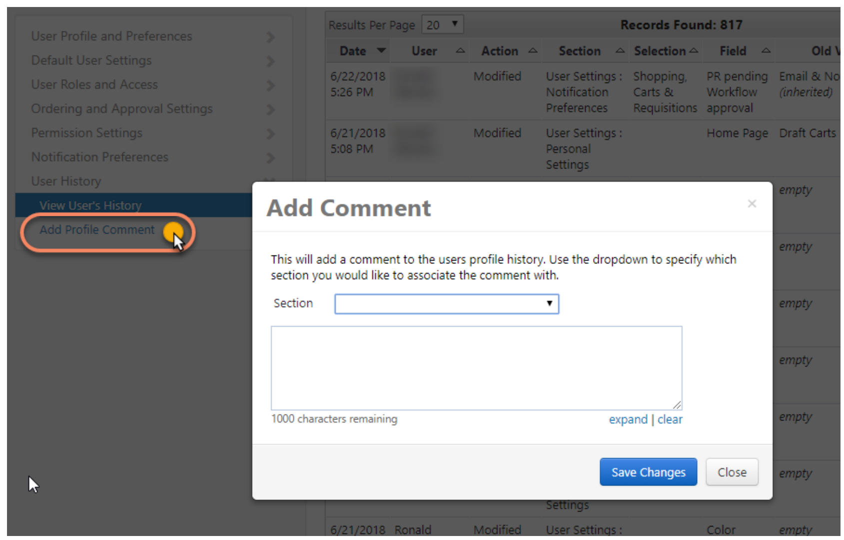
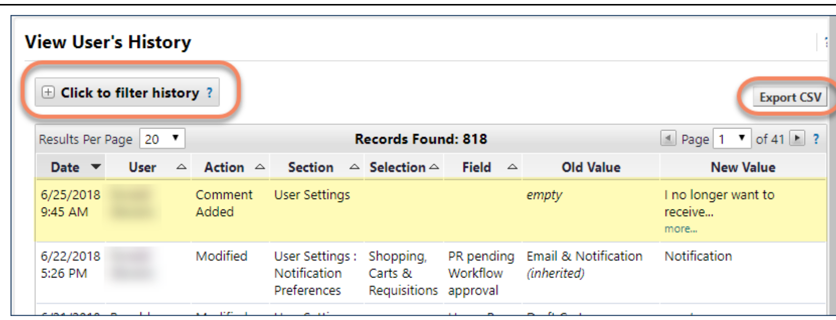
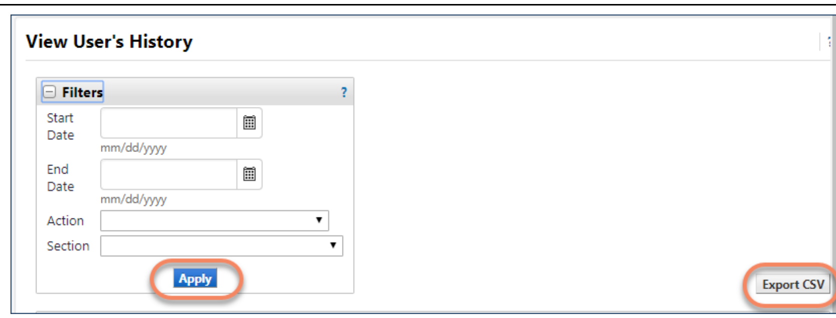
Process Steps:

Step	Action	Screenshot
Setting Notifications for Shopping		
1	Click on your name in the upper right section of the page and select **View My Profile** In the pop-up menu.	
2	In your profile, select the **Notification Preferences** section on the left side of your profile. Under this section are all of the areas that can have notifications set. Select **Shopping, Carts & Requisitions** to see your current notification settings. To edit any of these settings, click **Edit Section** in the top right corner.	

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>3</td><td>To change any of these settings, click the Override button to display a drop-down list and make a new selection.

You can override any of these setting to one of the following:
• None
• Email
• Notification
• Email & Notification

Click the Save Changes button when done.</td><td>
</td></tr>
<tr><td>4</td><td>The changes have made and saved.</td><td>
</td></tr>
</table>

Step	Action	Screenshot
Viewing Your Profile History and Comments		
1	In your profile, select the **User History** section on the left side of your profile. Under that section, select **View User's History**. Every change your (or anybody) ever made to your profile is shown here. You can seee the Old Value and New Value of the section and field that was changed. You can even sort the list by any of the headings.	
2	If you would like to make a comment to a change you are making, to remind you why you made the change for future reference, click on **Add Profile Comment** under the **User History** section. The following popup appears. Select the associated section in the drop-down list and type in your comment. Click **Save Changes** and **Close** the **Add Comment** popup.	
3	The comment is added to your User's history. **Note:** Anything added to your User's history can never be deleted. You can also filter your User's History list by clicking on the **Click to filter history** button at the yop of the page.	
4	Enter the appropriate filter criteria and click **Apply**. You also have the option of exporting your history to a CSV file if you like.	

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HUSKYBUY UCONN

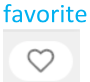
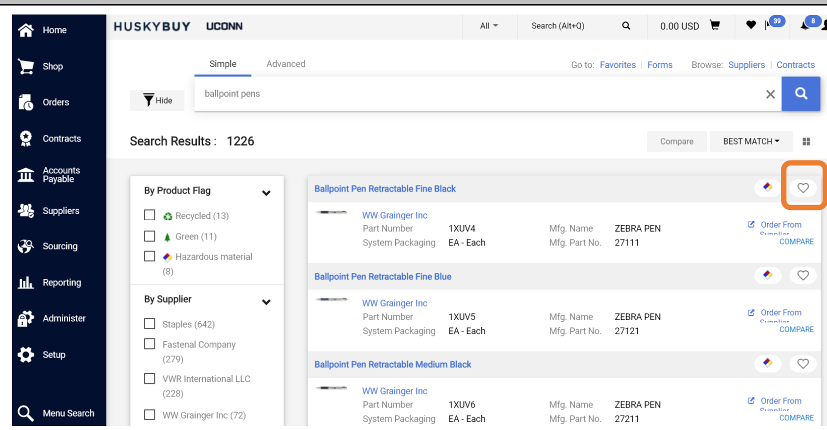
Adding Favorites

Support
(860) 486-2BUY (2289)
HuskyBuySupport@UConn.edu

Overview Within HuskBuy, you can add routinely ordered items to a **Favorites** folder for quick re-ordering. Please note: only hosted catalog items and forms can be added as Favorites.

Contents Included within this user-guide you will find:

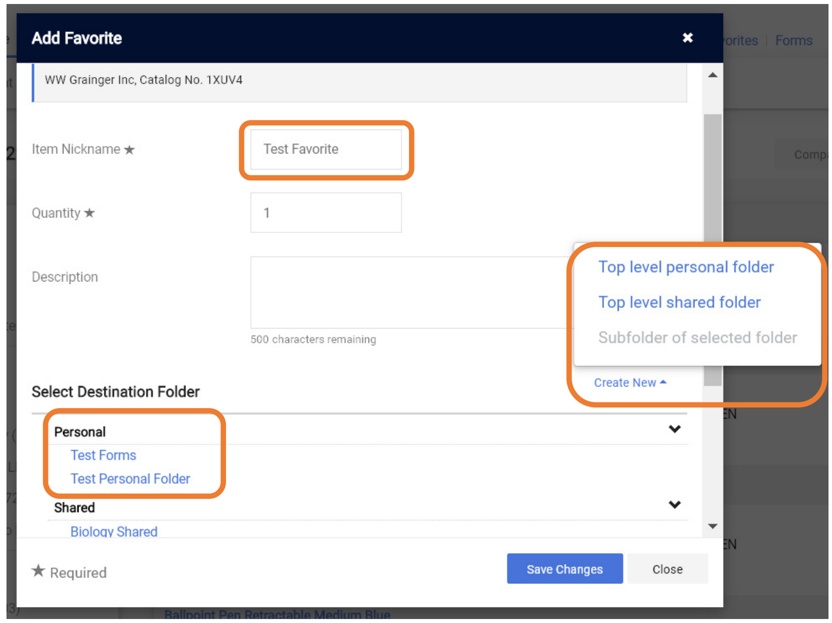
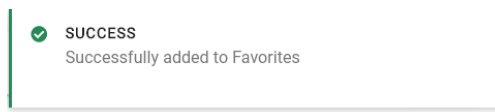
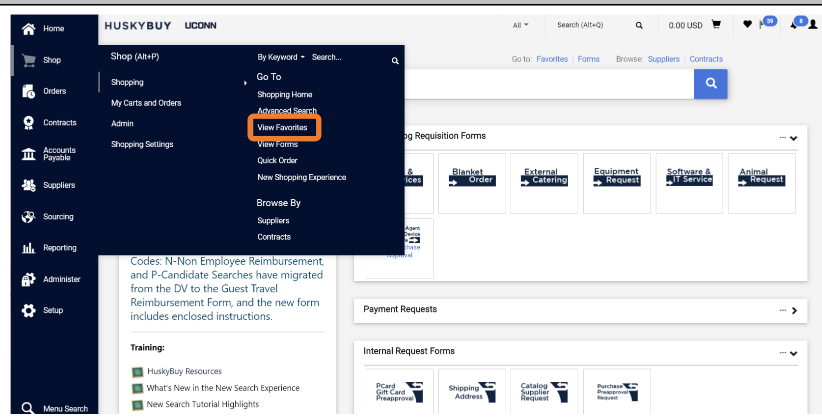
Process Steps:

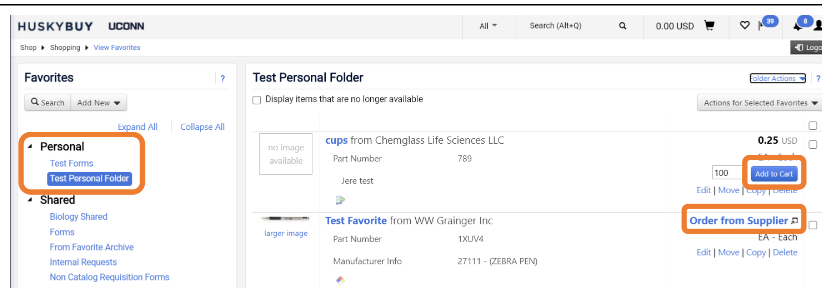
Step	Action	Screenshot
Adding to Favorites		
1	Navigate to the item you would like to favorite. • For catalog items, search for the item. Select the item's corresponding add favorite icon in the search results.  • For forms, open the form you would like to favorite. Fill out the form with information you want to save. This information will be retained whenever you add the form to your cart. Navigate to the Available Actions menu at the top of the form and choose Add to Favorite in the dropdown menu. Click the Go button.	

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>2</td><td>A pop up window appears.

Edit the Item Nickname* (if desired).

(The correct product name will display on the requisition and purchase order to the supplier.)

Go to Step 2: Select Destination Folder to save the item to an existing favorites folder (or create a new folder using the <u>Create New</u> link) and click the Save Changes button.</td><td>
</td></tr>
<tr><td>3</td><td>A message will appear noting the product has been added to the favorites folder.</td><td>
</td></tr>
<tr><td colspan="3">Accessing Favorites</td></tr>
<tr><td>1</td><td>To access saved Favorites, use the icons on the left to go to Shop > Shopping > View Favorites.</td><td>
</td></tr>
<tr><td>2</td><td>Then, select the folder where you saved the item.

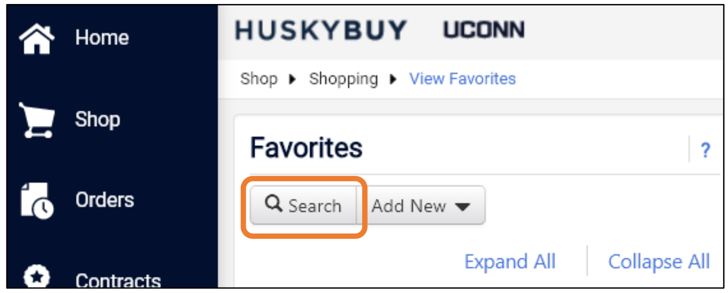
Hosted Catalog items have the option to Add to Cart where as the Punchout Catalog item has the option to order directly from the suppliers punchout website.</td><td>
</td></tr>
</table>

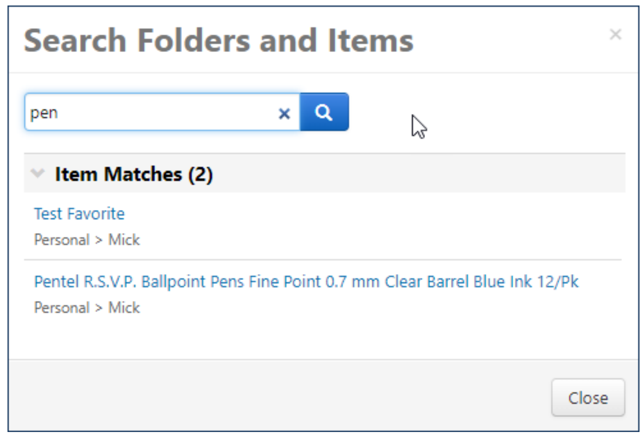
<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td colspan="3">Searching Favorites</td></tr>
<tr><td>1</td><td>Use the icons on the left to go to Shop > Shopping > View Favorites.

Click the Search button located above the favorites folders. A search box appears. Enter keywords you are searching for. Click the magnifying glass icon to search.

The search results return favorites and favorites folders that contain your search keywords.

Click on a result to navigate to the folder or favorite.

To add a saved favorite to your cart, click the favorite's corresponding Add to Cart button.</td><td>


</td></tr>
</table>

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Support
(860) 486-2BUY (2289)
HuskyBuySupport@UConn.edu

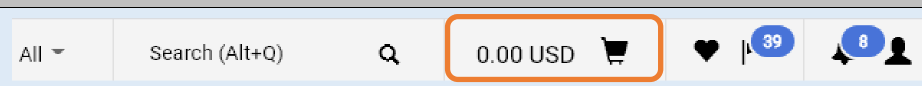
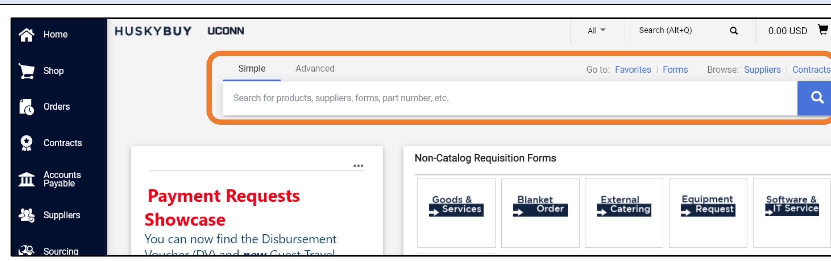
HUSKYBUY UCONN

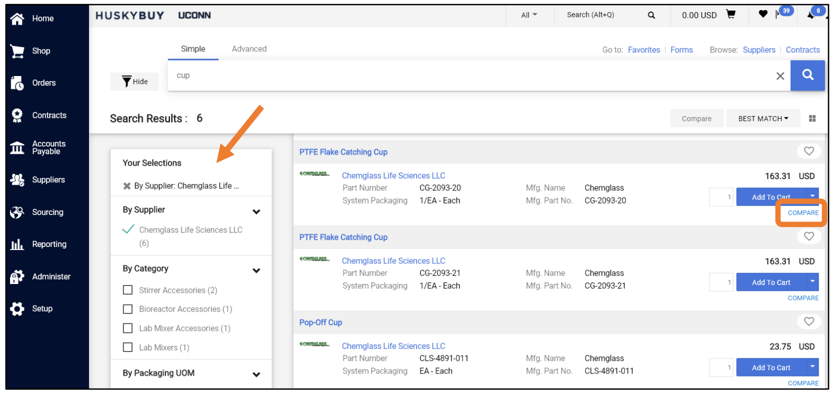
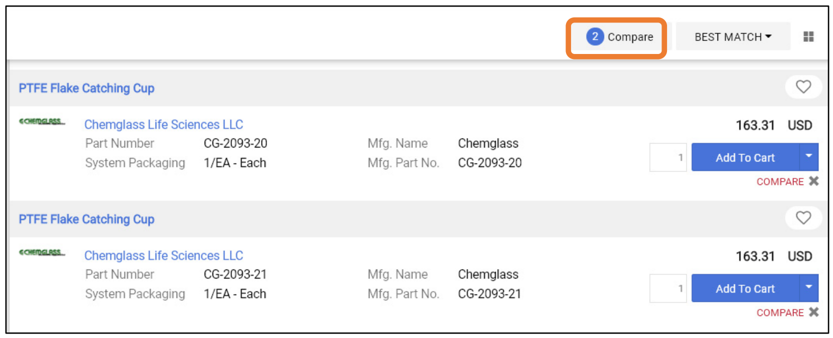
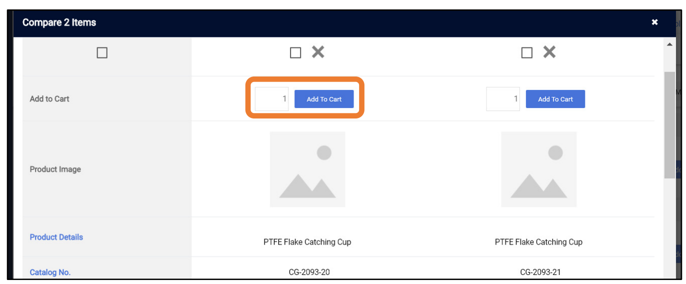
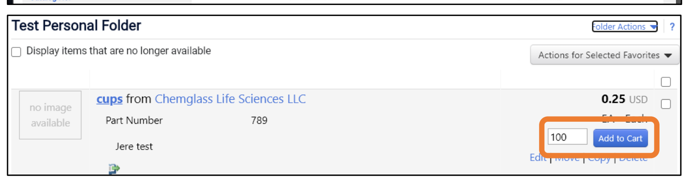
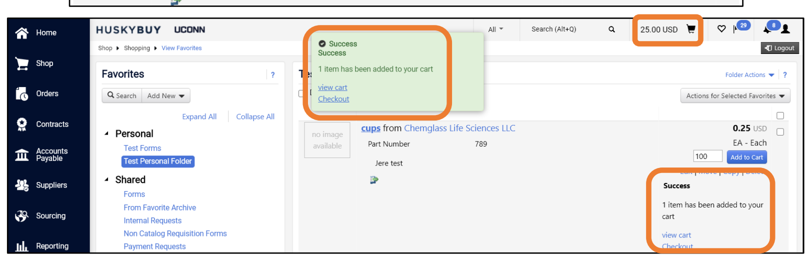
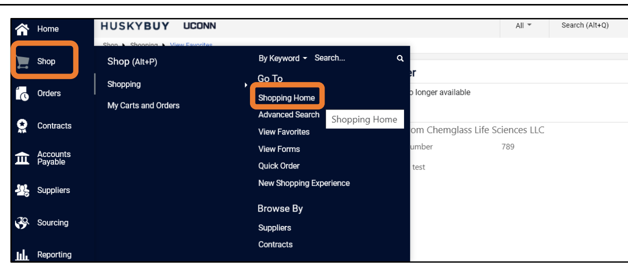
Shopping with Catalogs

Overview The HuskyBuy catalogs contain thousands of items from preferred suppliers at University-specific pricing. Catalog ordering is done using either Punchout or Hosted catalogs.

Contents Included within this user-guide you will find:

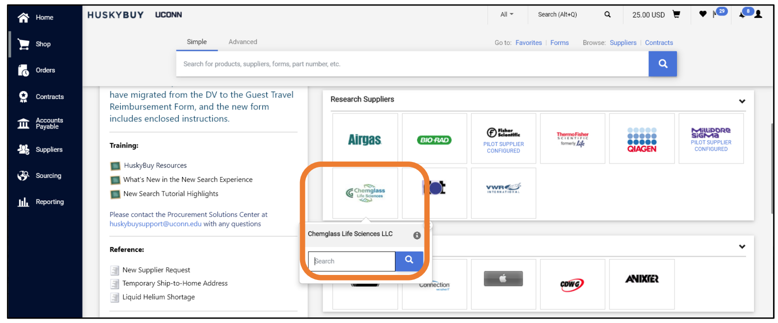
Process Steps:

Step	Action	Screenshot
Searching the Catalogs and Adding items to Cart		
Note: In order to save time and prevent confusion, it's a good idea to ensure your cart is empty before shopping from a catalog. You will **not** be able mix certain items on the cart later such as order types (ex. Blanket order form and Airgas catalog). Nor will you be able to add items to a new cart from a different catalog. (ie. Dell and Fisher catalog items cannot be combined in the same cart.) 		
1	To search for items in the **hosted catalogs**, enter your search terms in the **large search box** at the top of the Shopping Homepage, and then click the **blue magnifying glass** button. Optionally, click on the **Advanced** link to search by additional criteria, such as Product Description, Part Number, Supplier, or Manufacturer Name.	

Step	Action	Screenshot
2	The search results will appear. The product picture (if any), description, and other detailed specifications, are typically shown. • On the left side are the **Filter Results** options. This lets you filter the results by Supplier, Manufacturer, Unit of Measure and more. • Use the compare link to compare two or more items. Once you have flagged several items to compare, click the **Compare** button, located towards the upper right. 	 
3	Click the **Add to Cart** button to add items to your cart.  To access the shopping cart after adding an item, select the ***1 item(s) added, view cart*** link, or click the cart icon located at the top right corner of the page.	  
4	To continue shopping, use the icons on the left to go to **Shop > Shopping > Shopping Home**.	

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td colspan="3">Shopping with a Specific Catalog Supplier</td></tr>
<tr><td colspan="3">If you would like to search the product offerings of a specific hosted catalog supplier, use the search associated with the hosted catalog supplier’s icon on the Shopping Homepage.</td></tr>
<tr><td>1</td><td>Click the catalog supplier’s icon.

You can also enter search terms in the search box if the window appears below the supplier’s icon.

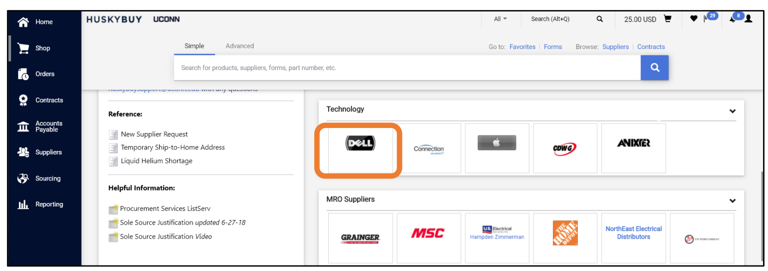
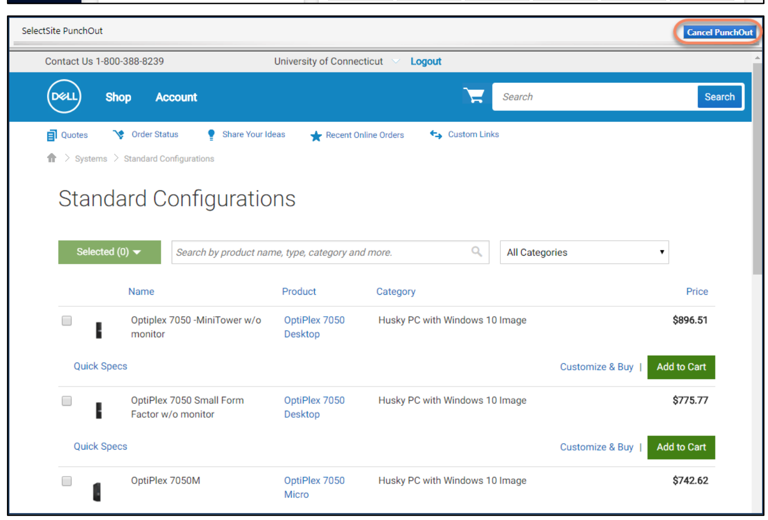
Click the magnifying glass icon to search.</td><td></td></tr>
<tr><td colspan="3">Shopping with Punch-outs</td></tr>
<tr><td colspan="3">Punch-outs connect to the supplier’s website containing contract pricing. Punch-out sites retain the look and feel of the supplier’s regular public website; however, the supplier’s checkout cart will result in the products returned to your HuskyBuy active cart.

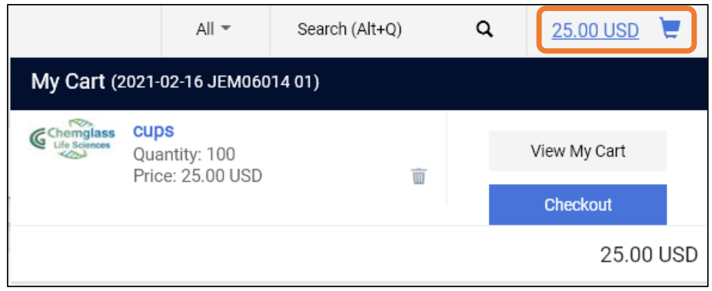
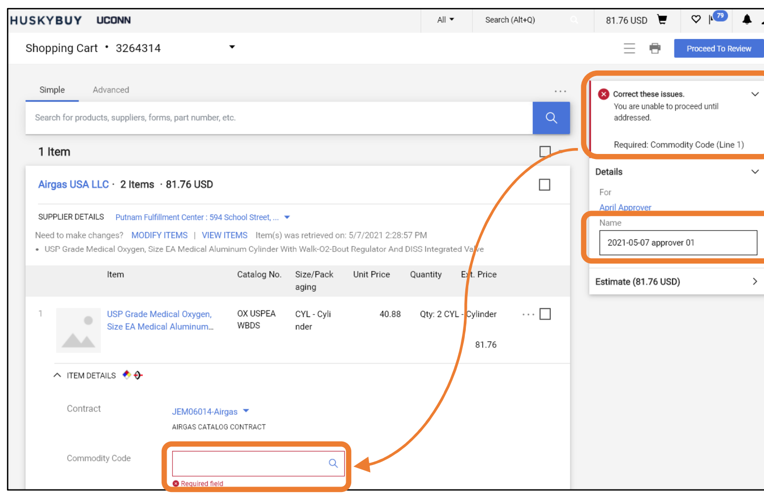
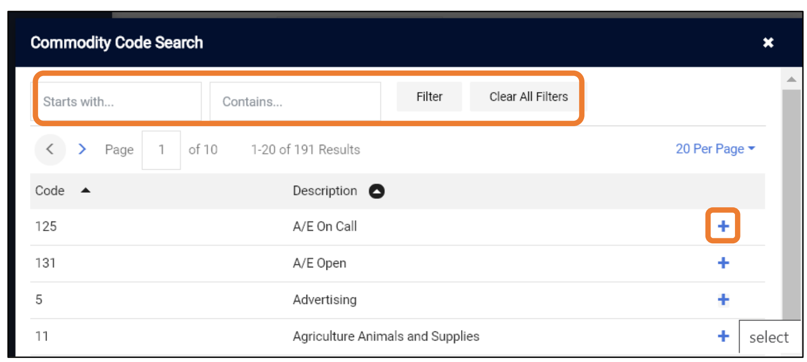
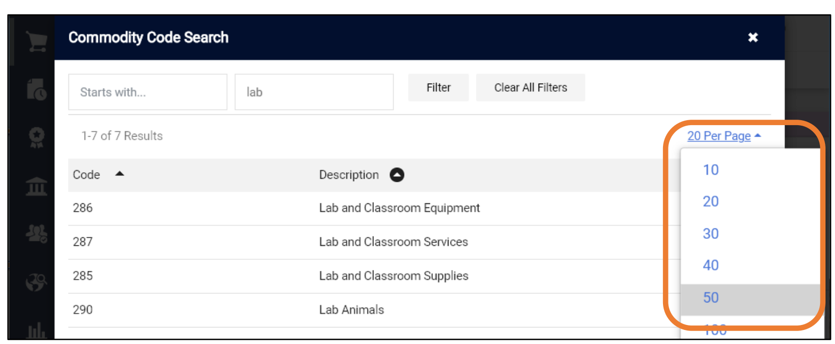
Follow the supplier’s directions for submitting the items back to HuskyBuy as each supplier’s site may differ. Product pricing and availability may vary between the supplier’s public and University websites.</td></tr>
<tr><td>1</td><td>Click the supplier’s icon to begin the Punch-out session.

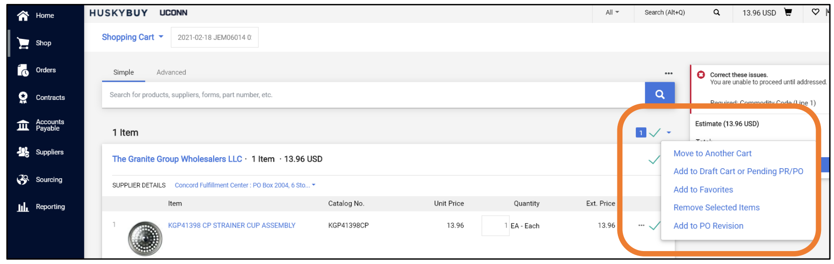
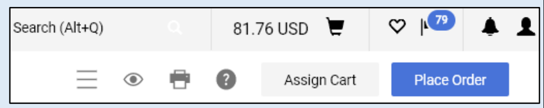
Search in the supplier’s catalog for items and add to the supplier’s shopping cart.

Complete shopping on supplier’s site, then return items to the HuskyBuy shopping cart.

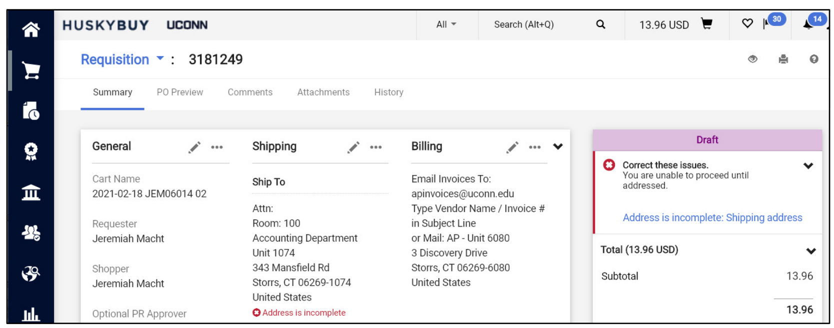
(If you are only browsing the Punch-out and are not returning items to HuskyBuy, you may exit the Punch-out by closing the Punch-out window and clicking the Cancel Punch-out button in the main browser page.)

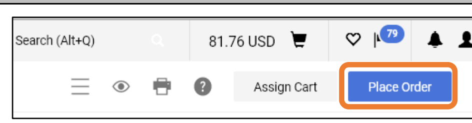
</td><td>
</td></tr>
</table>

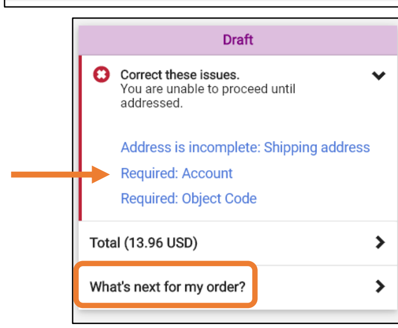
Step	Action	Screenshot
Updating and Editing Shopping Cart Items		
1	After adding items to your shopping cart, you can click on the cart icon to view the items there. You can remove items at this point by clicking on the trash can icon for that item. You can also go directly to checkout from here, or choose to ***View My Cart*** first. Click the ***View My Cart*** button.	
Adding Commodity Codes		
1	After clicking on the ***View My Cart*** button you will be presented with your cart. You will need to add a commodity code to proceed. You can search for commodity codes by clicking on the magnifying glass to bring up the **Commodity Code Search** box. From here, you can enter the code or the first number(s) of the code, or any part of the description to search. (Wild card characters are not needed.) Search the list and select the correct code by clicking the corresponding **plus** button. You can also give your cart a name in the Details section.	
2	**Note:** You can change the number of **Results Per Page** by changing the selection in the dropdown list.	

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>3</td><td>By selecting the check box to the right of one or more items in your cart, you can access the dropdown.  You will have the following options available for the selected items.
Move to Another Cart
Add to Draft Cart or Pending PR/PO
Add to Favorites
Remove Selected Items
Add to PO Revision</td><td>
</td></tr>
<tr><td colspan="3">Proceed to Review</td></tr>
<tr><td>1</td><td>Click the Proceed to Review button to display the details of the future requisition.</td><td>
</td></tr>
<tr><td colspan="2">Note: On the requisition page, people with only the (default) Shopper role will not see the Place Order button in the upper right corner of the screen. These Shopper roles will only have an Assign Cart button. They will be able to assign the cart to a Requester or Approver in their department and are then done.</td><td>
</td></tr>
<tr><td>2</td><td>Most other roles can continue with their order. Missing or incomplete information, such as Shipping Address, will appear as an error at the top right of the page. 

Enter the missing shipping information as needed by choosing the pencil edit button. 

Note: Setting up your profile with your shipping address will bypass this error. (See the Setting Your Profile Job-Aid.)</td><td>
</td></tr>
<tr><td colspan="3">Adding the Accounting Codes</td></tr>
<tr><td>1</td><td>The Draft Status section at the top right of the page shows where the missing information is. Clicking on the error link will take you to the problem area, in this case, the Accounting Codes.

Note: The PR Approval tab is no longer on the top navigation bar. The name has changed and has moved to the right sidebar under the Place Order button. It is now titled What's next for my order?</td><td>

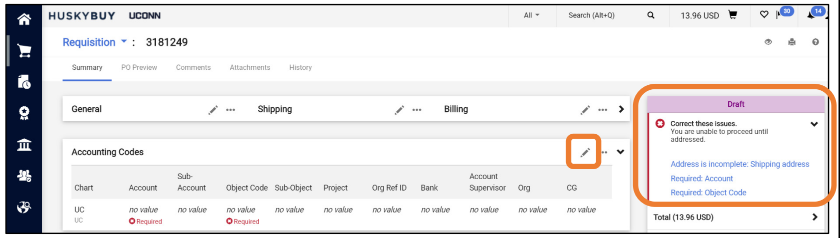

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>2</td><td>

Click on the **Accounting Codes** link in the Draft Status section or the Pencil Edit Icon in the Accounting Codes section. Enter the missing accounting information as needed.

The **Account** and **Object Code** fields will have the red *Required* note.

</td><td>



</td></tr>
<tr><td>3</td><td>

Either method will result in the **Codes** pop-up box shown here.

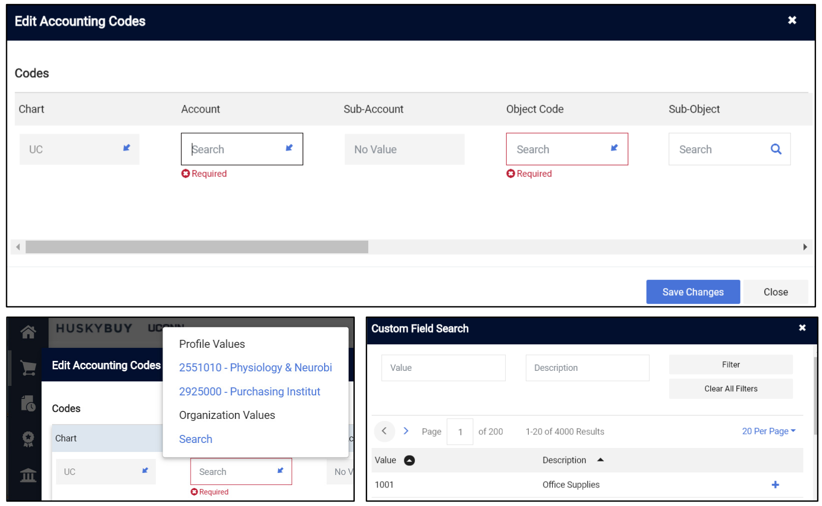
If you know the codes, you can enter them in the field directly.

If you are not sure, click on the **arrow or magnifying glass** to bring up the **Custom Field Search** box. The arrow will bring up the option to use one of your default profile values or to search for another one.

The search option works just like the [Adding Commodity Codes]() section. You can enter the first number(s) of the code, or any part of the description to search. (Wild card characters are not needed.)

When the codes are entered click **Save** to enter them into the order.

</td><td>

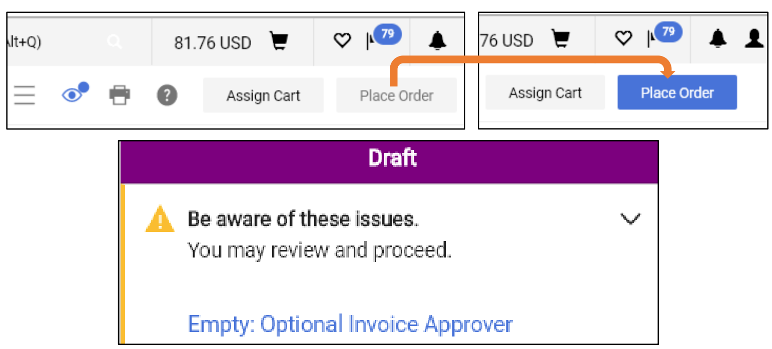


</td></tr>
<tr><td>4</td><td>

Once all errors have been addressed the **Place Order** button will be activated.

You have the option of adding an Optional Invoice Approver before placing the order, but it is not necessary.

</td><td>

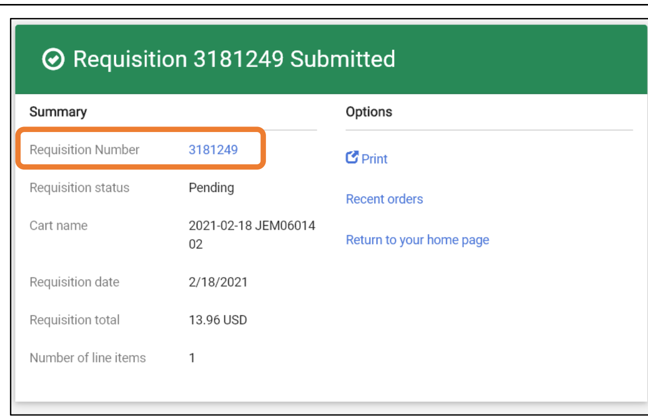


</td></tr>
<tr><td>5</td><td>

Click the **Place Order** button to submit the order.

Record you requisition number for follow up.

</td><td>



</td></tr>
</table>

HUSKYBUY UCONN

Shopping with Forms

Support
(860) 486-2BUY (2289)
HuskyBuySupport@UConn.edu

Overview

Non-Catalog items can be ordered when the items you want are not available from one of the "Punchout" or "Hosted" catalogs.

We currently have seven different forms for making non-catalog purchases in HuskyBuy. Here is a general description of each:

- **Goods and Services:** This form will be used for most items and is described in this Job-Aid. Use this form for everything except for what is listed in the other forms below.
- **Blanket Order:** Use this form for making long-term purchase orders for repeated deliveries of goods or services.
- **External Catering Request:** Use this form for External Catering Services. Remember that University policies must be followed when ordering any catering services.
- **Disbursement Voucher:** Complete this form to submit a Disbursement Voucher to Accounts Payable.
- **Guest Travel:** Complete this form to submit a travel Disbursement Voucher to Accounts Payable.
- **Equipment Request:** Use this form for any equipment purchases. (Not to be used for A/V equipment)
- **Software and IT Services:** Use this form when ordering Software and IT Services. This form excludes website design, website development, and web hosting services. For these services use the Non-Catalog Goods and Services form.
- **Biological Agent, Clean Air Device, Radioactive Request form:** Use for making EH&S purchases.

General Rules for Forms

Read the instructions on the first page of each form carefully.

Each of these forms will create a line item on a requisition once you submit the form. Attach any back-up documentation related to the purchase on the requisition. You can navigate through the forms by clicking on **Next** or Previous. Although there is a **Save Progress** button on most pages, clicking **Next** it will also save.

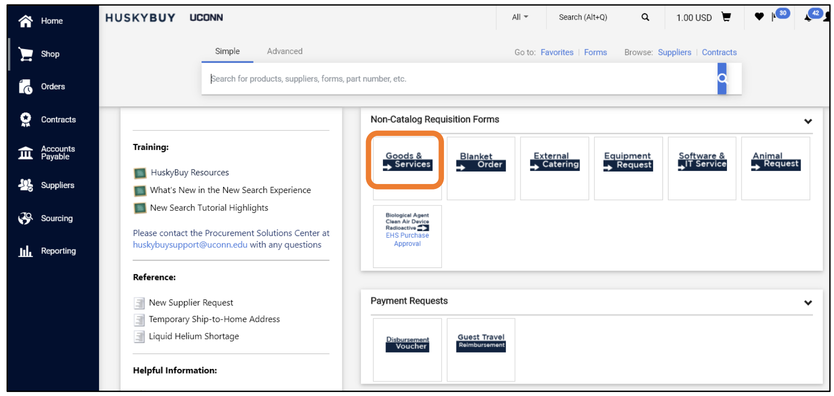
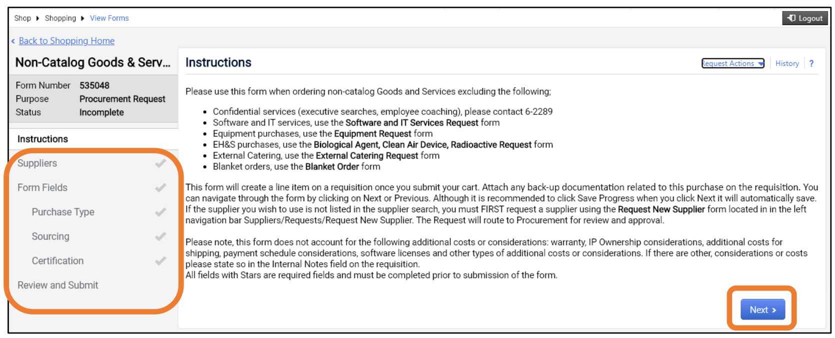
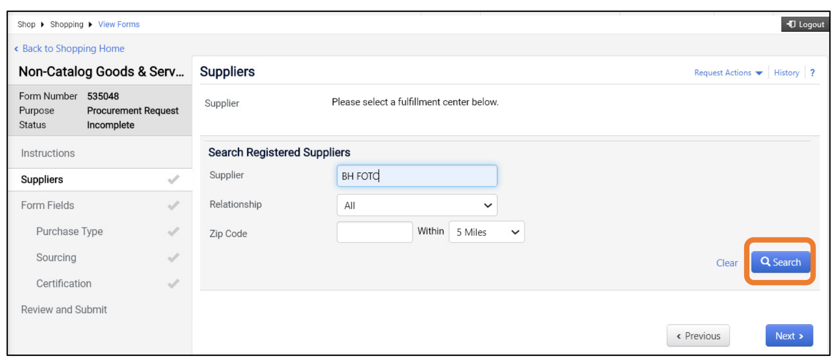
If the supplier you wish to use is not listed in the supplier search, you must FIRST request a supplier using the **Request New Supplier form** located in in the left navigation bar **Suppliers > Requests > Request New Supplier**. The Request will route to Procurement for review and approval. *(See the **Searching and Requesting Suppliers** Job-Aid for instructions if necessary.)*

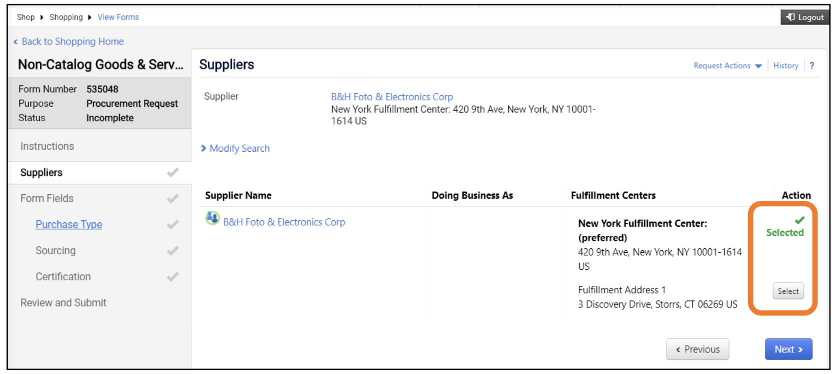
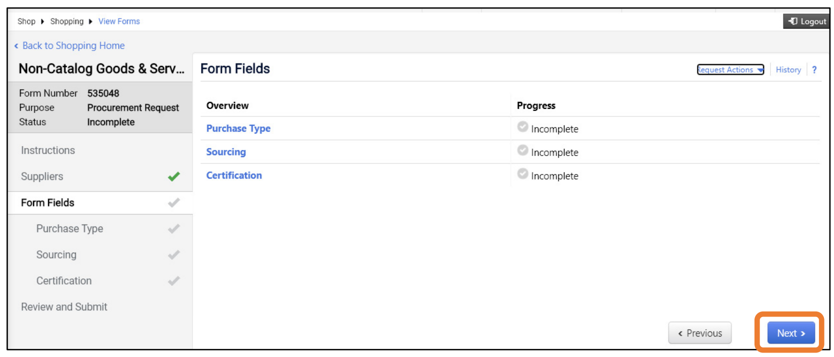
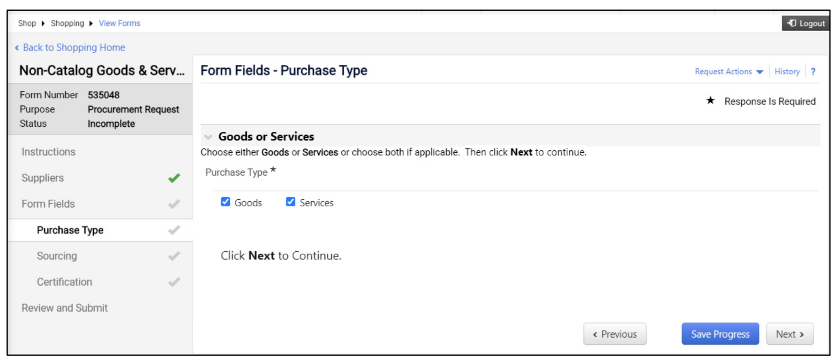
All fields with Stars (★) are required fields and must be completed prior to submission of the form. Some of the forms will use **BOLD** line items to indicate a required field.

Contents

Included within this user-guide you will find:

Process Steps:

Step	Action	Screenshot
Selecting the Goods and Services Form		
1	At the Shopping home page of HuskyBuy, find the **Non-Catalog Requisition Forms** and **Payment Requests** showcase at the top of the page. Click on the **Goods & Services** form.	
2	Read the instructions carefully if this is the first time through the form. Notice the sections on the left that will guide you through the form. These will show a green check (✔) when the section is complete. You can click directly on the sections to go to them, but this is used mostly if you need to edit the form later. Click **Next >** to continue.	
Choose a Supplier		
1	Enter a supplier name into the Supplier field and click **Search**. Note: Wildcard characters are not necessary when doing a search in HuskyBuy.	

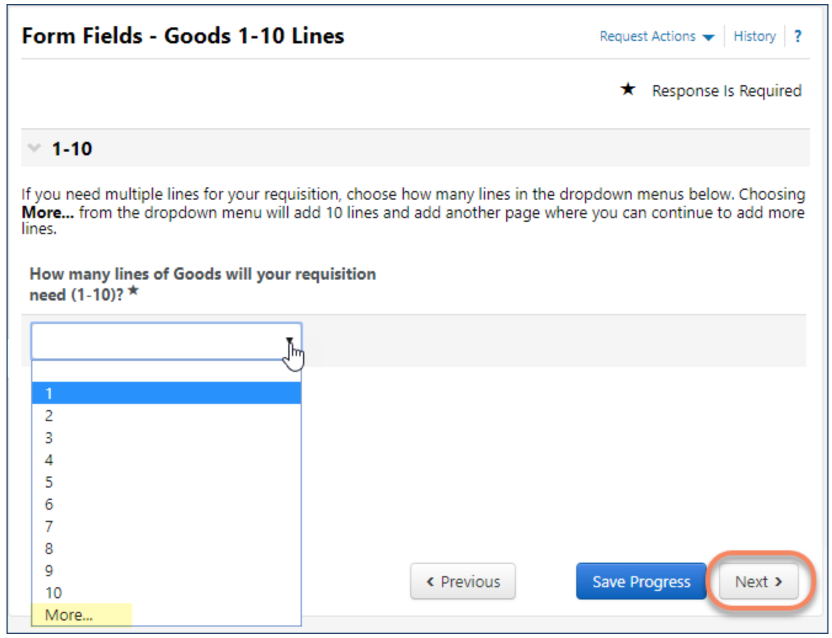
Step	Action	Screenshot
2	Select the correct supplier from the displayed list by clicking on the **Select** button. Some suppliers have more than one fulfillment center. By default, the primary fulfillment center will be selected. If the primary fulfillment address is not the address you want your order to go to select the appropriate address. **Note:** Clicking on the Supplier Name will open a pop-up window with the supplier's profile information for verification. When green check ( ) appears as selected, click **Next >**.	
Enter the Purchase Information		
1	The supplier section is now complete signified by the green check ( ). Now we will sequence through the three sections of the **Form Fields**. • Purchase Type • Sourcing • Certification Click **Next >** to go to the **Purchase Type** section.	
2	Here you can select either Goods, Services, or both. In this example, we will choose both **Goods** and **Services** and click **Next >**. **Note:** It is the intention of the procurement group to gather all of the pertinent information up front in this process so that the order will go through without unnecessary delays. You will be asked about the **Goods** first.	

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>3</td><td>

Goods

You can now choose to add up to 50 lines on the form for the requisition, in increments of 10.

If you choose **More…** from the drop-down list, and click **Next >**, you will get the first 10 lines as shown below in step 4 below.

</td><td>


</td></tr>
<tr><td>4</td><td>

Enter the Unit Price, Quantity, Unit of Measure, a Description, and a Catalog No. *(If known)* for each line.

At the end of line 10, you can click **Next >** and add up to 10 or **More…** lines again.

This process repeats in blocks of 10 until you get to the **41-50 Lines** block.

Note: *There are no checks to ensure that you fill out all of the information in each line. You can go to the requisition with no information at all. You can also come back to this form and add the missing information. However, if you get to the PO with missing information, it will be difficult to correct. We will check for this later.*

For now, please ensure that all of the top 4 fields are populated for each line.

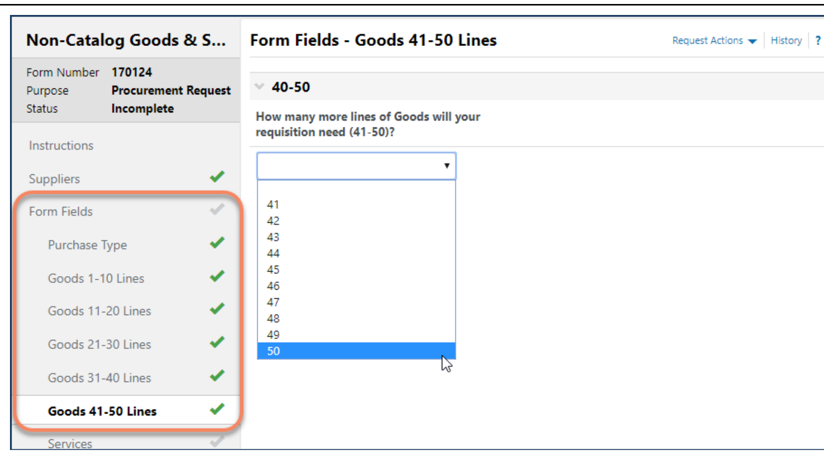
</td><td>


</td></tr>
<tr><td>5</td><td>

As you can see, the Goods are sectioned off in blocks of 10. And 50 is the highest we can go.

50 is the maximum number of lines we can add to a requisition for goods.

When we are done adding lines to the **Goods** section, and click **Next >**, we go to the **Services** section.

</td><td>


</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>6</td><td>

Services

"Services" is similar to Goods except that there are only 10 lines available, and we need to select a compensation structure.

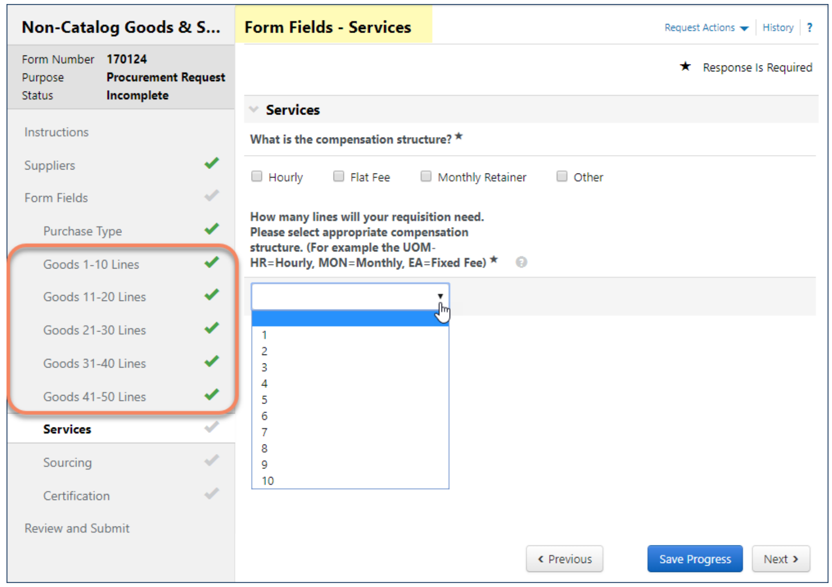
We will still need to enter the Unit Price, Quantity, Unit of Measure, and a Description for each line.

When all of the fields are filled out, click **Next >**.

You will be directed to the Sourcing section.

The supplier and Purchase sections are now complete as signified by the green checks (✔).

</td><td>



</td></tr>
<tr><td colspan="3">

Enter the Sourcing Information

</td></tr>
<tr><td>1</td><td>

Is this purchase federally funded?

If you answered **Yes** or **I Don't Know**, you are directed to the Federally Funded Purchasing Guidelines document.

Select the Sourcing Dollar Threshold

Each choice will offer different options. We will describe each selection below.

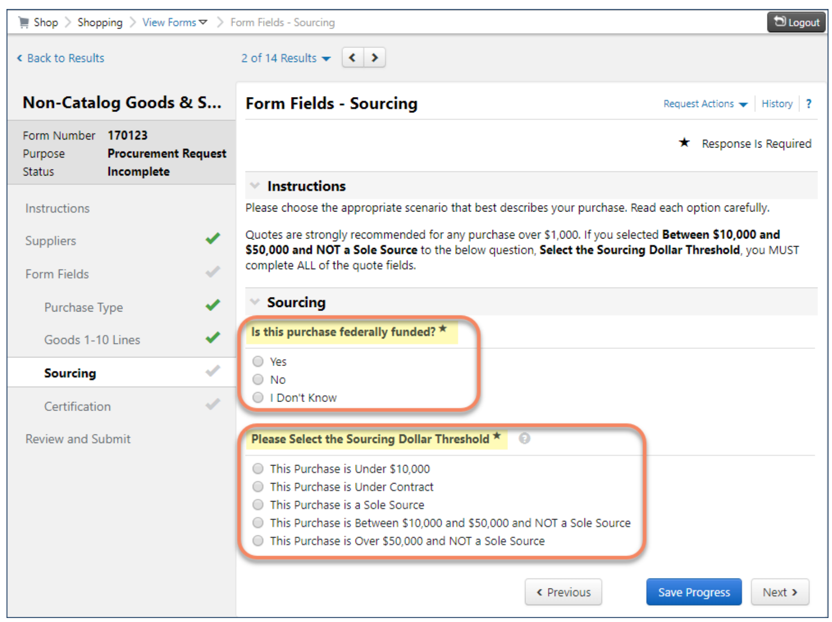
This Purchase is Under $10,000

If you have a quote, please upload it here.

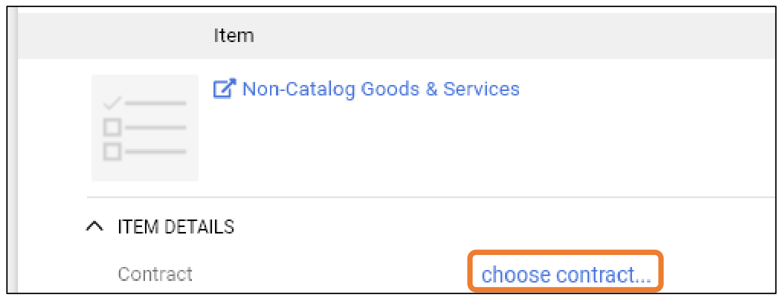
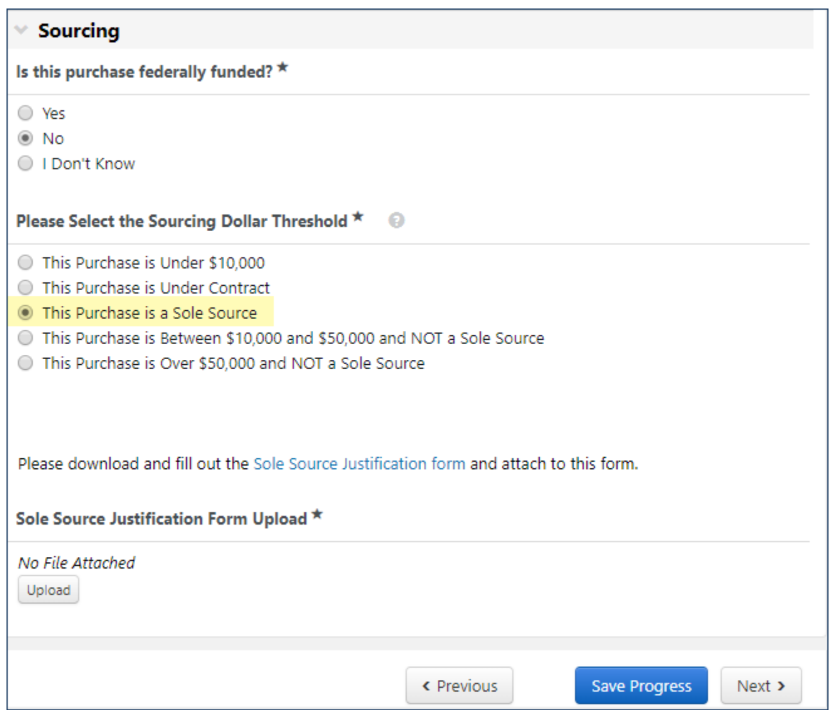
If you received a verbal quote from your sales rep, or found an online source such as a website, please describe it here. Include the website URL if necessary.

Note: Quotes can be uploaded to the requisition later if necessary.

</td><td>



</td></tr>
</table>

Step	Action	Screenshot
2	**This Purchase is Under Contract** This is just a reminder to apply the contract in the shopping cart after submitting this form. **Note:** Procurement no longer sees requisitions under $2,500, but they still need to keep track of the contract purchases. If a supplier has a contract, you will see the choice to choose contract... in the shopping cart, regardless of the selection made in this form. Please choose a contract in the shopping cart when given the choice.	 
3	**This Purchase is a Sole Source** This choice requires downloading the Sole Source Justification form, filling it out, and attaching it to this form. *(The form can be filled out digitally and saved.)*	

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>4</td><td>

<u>● This Purchase is Between $10,000 and $50,000 and NOT a Sole Source</u>

Selecting this choice requires three quotes.

(This is a State requirement)

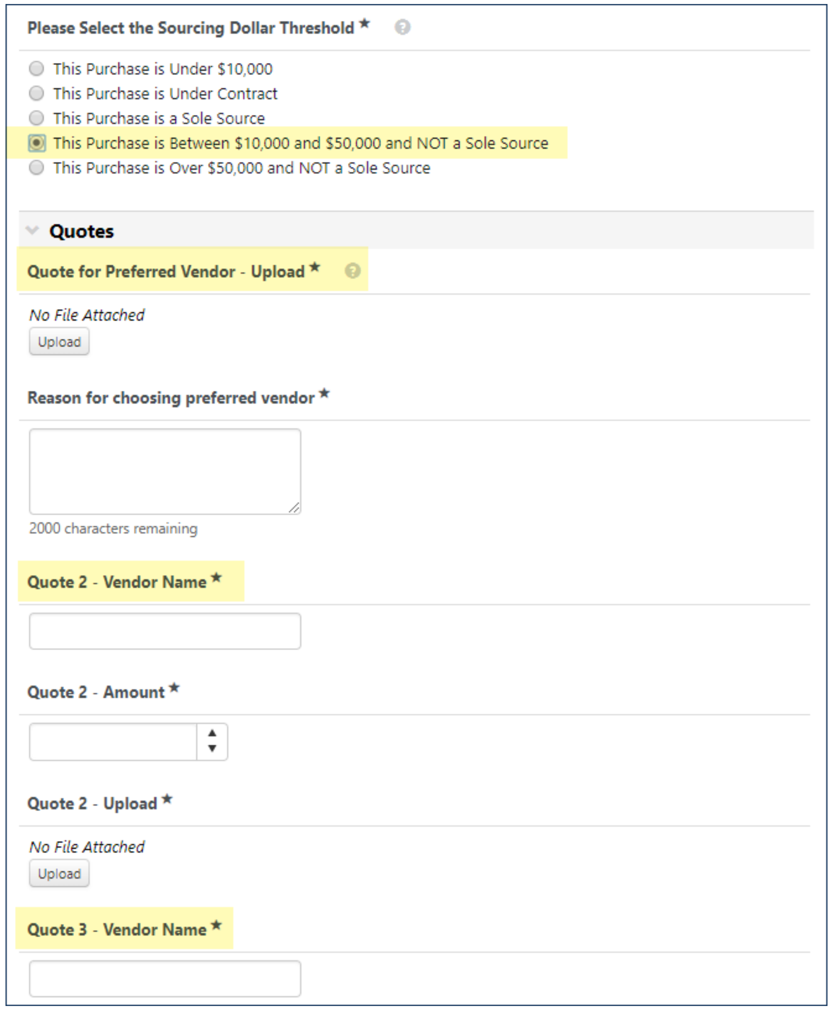
Here you can enter the supplier name, the quote amount, and upload the quotes for all three suppliers.

You also need to specify the reason for choosing the preferred supplier.

Note: *Quotes added here as attachments will not be transferred to the purchase requisition.*

If you want to attach a quote so the supplier has access to it, it will need to be added to the requisition. See the [Requisition Approval](#) Job-Aid.

</td><td>



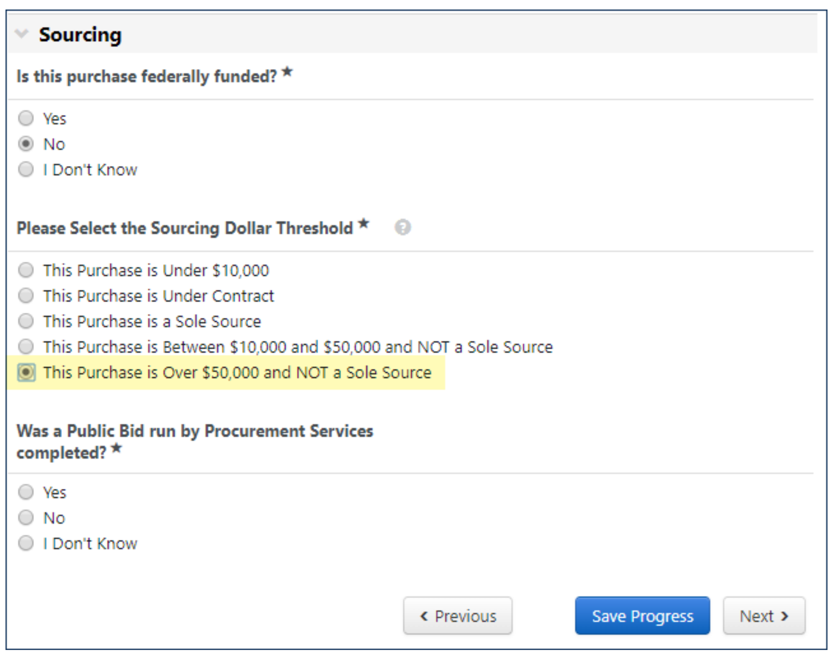
</td></tr>
<tr><td>5</td><td>

<u>● This Purchase is Over $50,000 and NOT a Sole Source</u>

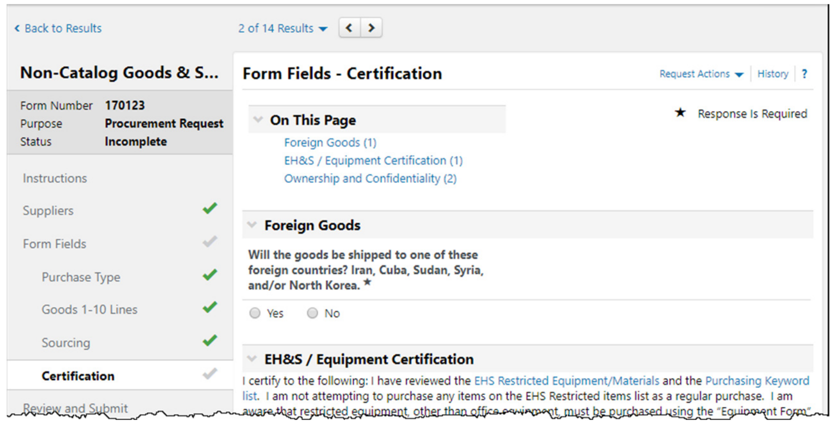
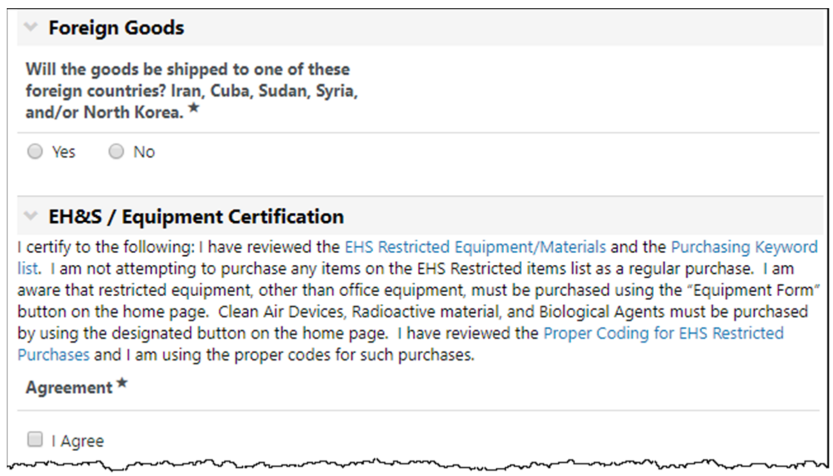
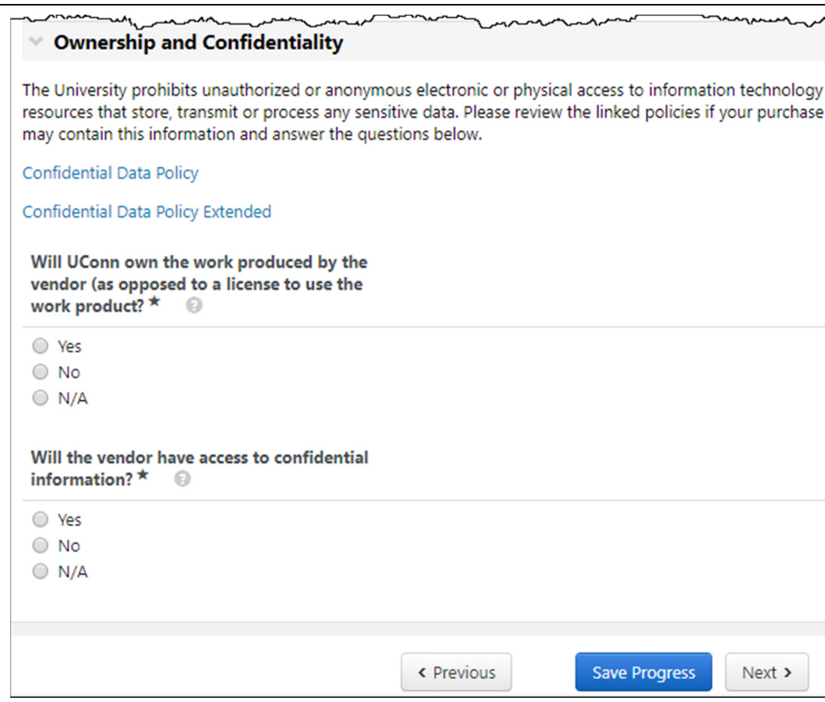
Answer one question to the best of your knowledge.

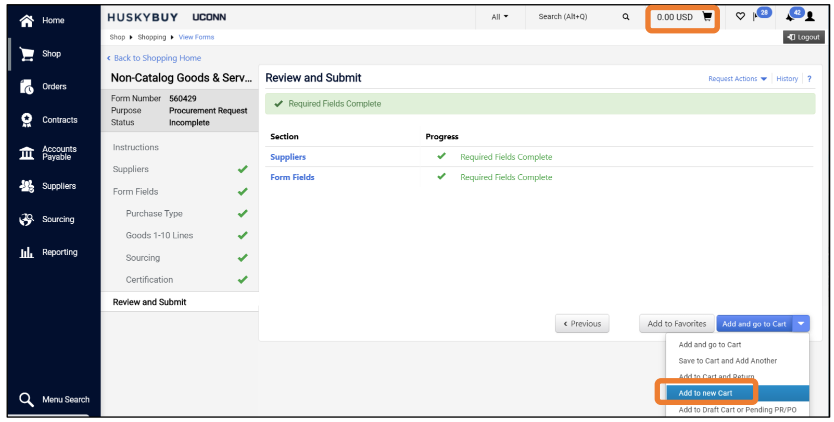
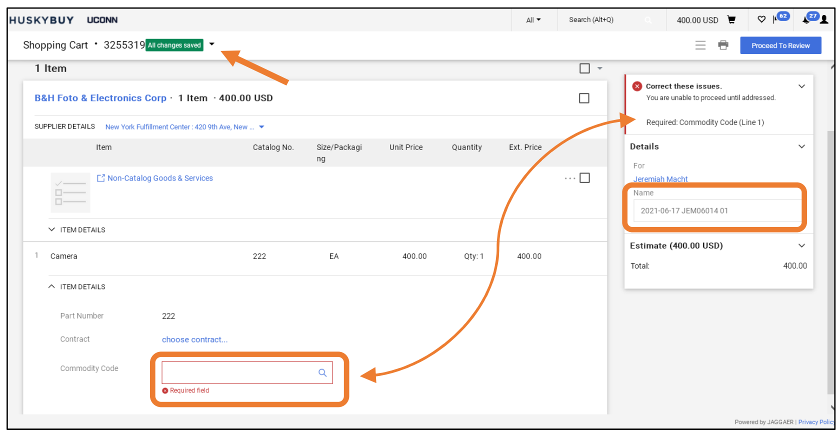
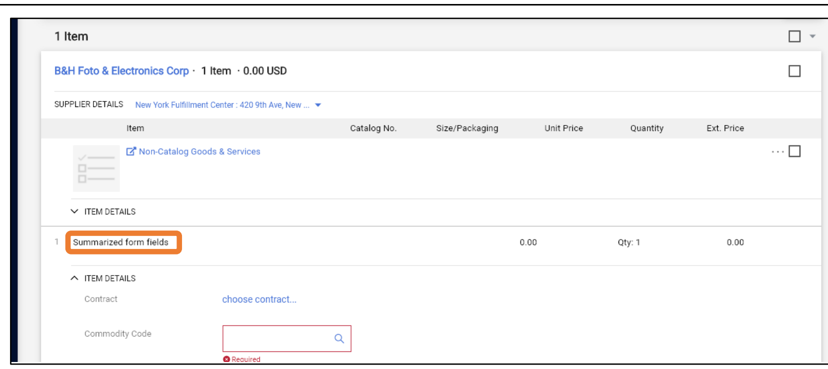
When done, click **Next >**.

</td><td>



</td></tr>
</table>

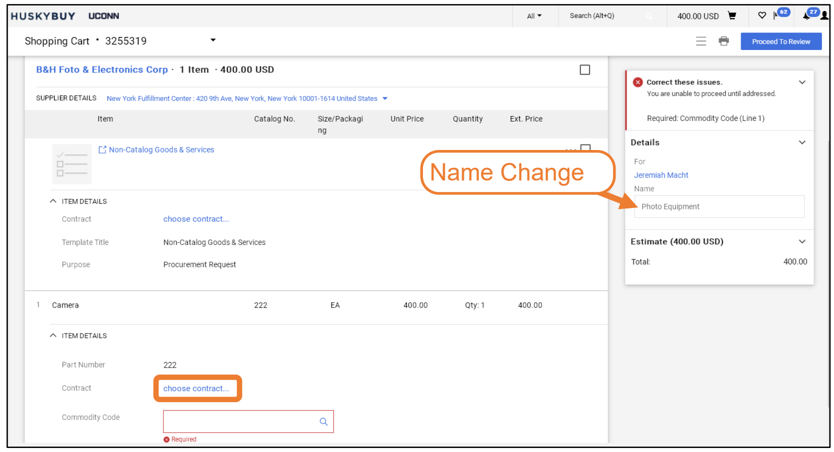
Step	Action	Screenshot
Enter the Certification Information		
1	The **Certification** section is the last of the **Form Field** sections. Answer the simple questions below.	
2	**Foreign Goods** Will the goods be shipped to one of these countries? Answer Yes or No. *(This will determine whether export approval is needed or not.)* **EH&S** You must agree to the EH&S statement. Review the EHS Restricted Equipment Materials and the Purchasing Keyword list as described on the form. Also review the Proper Coding for EHS Restricted Purchases page and click the **I Agree** check box.	
3	**Ownership and Confidentiality** Review the Confidential Data Policy and answer the question about if UConn will own the work or not. *(Choose N/A if this question does not apply to your order.)* Answer if the supplier will have access to confidential data or not. When done, click **Next >**.	

Step	Action	Screenshot
Add Items to Shopping Cart		
1	With all of the required fields complete, we are ready to add this order to our shopping cart. The default choice is: **Add and go to Cart**. This can be used if there is nothing already in your cart, as shown here, at the top of the page. However, if there is something already in your cart from another supplier, and you click **Add and go to Cart**, you will get an error and possibly lose all of your hard work. For this reason, we recommend that you get in the habit of selecting, **Add to new Cart**. Select, **Add to new Cart** from the drop-down list.	
2	Your Shopping Cart is given a default name consisting of the date, your User ID, and a serial number as shown. Change the name of your shopping cart to something meaningful to you. Changes will be automatically saved. **Note:** Renaming the cart is a great way to identify the cart contents later. The cart name field is displayed in many document search screens in HuskyBuy. Notice you may have a warning message to "Correct these issues". In this case you need to fill in the required Commodity Code. Instructions for changing the commodity code are below.	
3	**Checkpoint** This is a good place to ensure that the form came over correctly. If there was no quantity selected in the form, this is how the cart will look. The Description and Part Number shown above will be replaced with **Summarized Form Fields** and all of the dollar amounts will be zero. If everything looks good, continue. If you need to go back to the form to correct something, see the next section on [Changing the Quantity of an Item…]()	

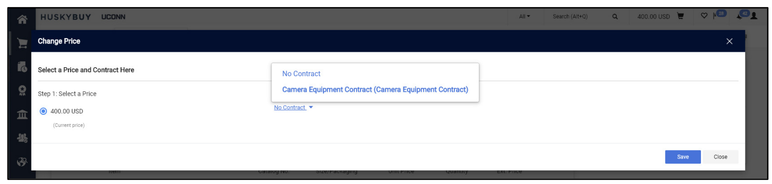
<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td colspan="3">Select a Contract and Add a Commodity Code</td></tr>
<tr><td>1</td><td>
Notice the name change of the shopping cart.

If the supplier has a contract with UConn, you will see a link to choose a contract.

Click choose contract…

(If there is no contract, there will be no link.)
</td><td>


</td></tr>
<tr><td>2</td><td>
Choose the right contract from the list and click OK.

Note: The contract names will created using descriptive names to make choosing the correct contract easier.
</td><td>


</td></tr>
<tr><td>3</td><td>
If you know the Commodity Code, you can type it directly into the field. This will save once you click off the field.

If you do NOT know the Commodity Code, click on the magnifying glass to search.

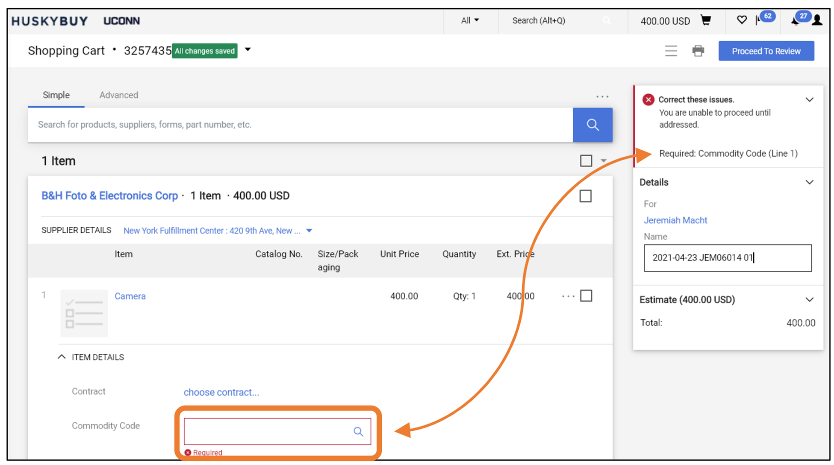
In the **Commodity Code Search** box, enter description words or the starting number(s) of the commodity code (if known), and click **Search**.

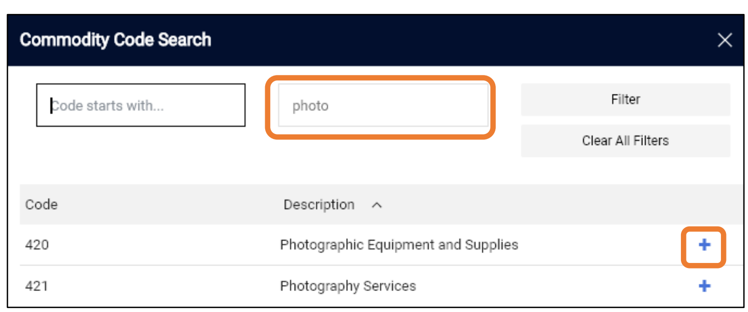
Note: If you click Search with blank fields, you can scroll through the complete list of 200+ Commodity Codes to help find the correct one.

Scroll through the search results to find the right Commodity Code.

Click on the + button when you find the right Commodity Code.

The selected code will be added to the Commodity Code field.

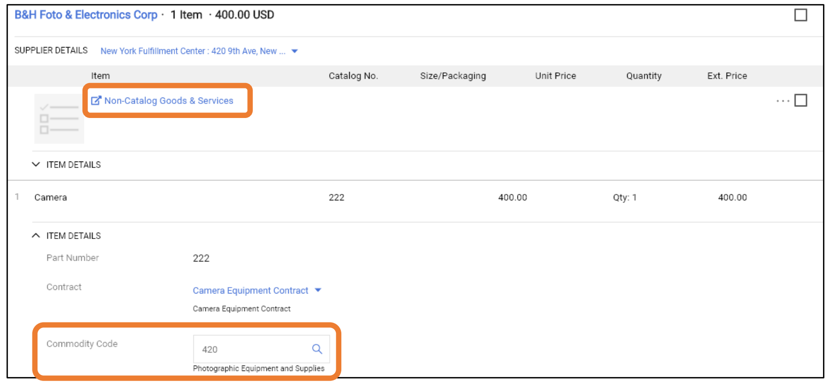
Your changes will be saved once you click out of the Commodity Code field.
</td><td>


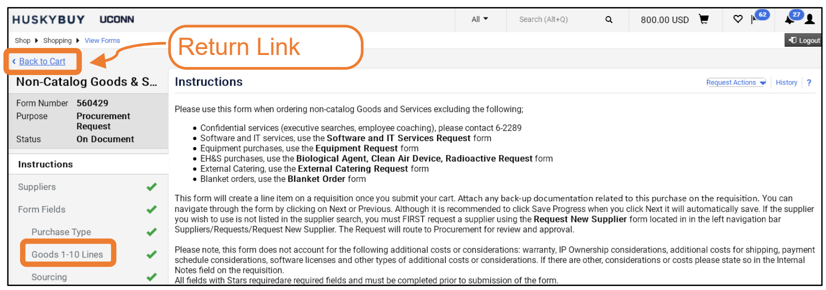


</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td colspan="3">Changing the Quantity of an Item on the Cart</td></tr>
<tr><td>1</td><td>Notice the Commodity Code was added.

Before creating the Requisition, you can make quantity changes to your order by returning to the Goods & Services Form.

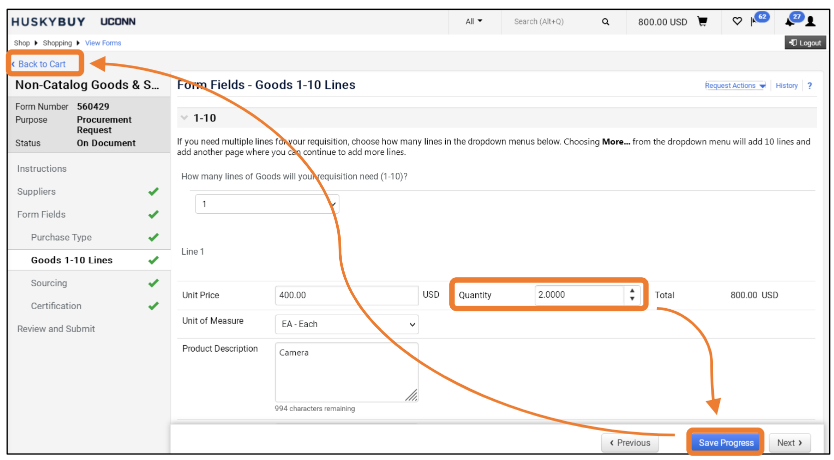
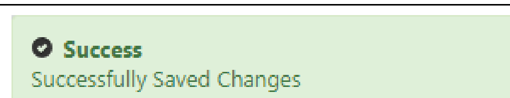
Do this by clicking on the link to the Non-Catalog Goods & Services form as shown.</td><td></td></tr>
<tr><td>2</td><td>Back in the Form, click on the Goods 1-10 Lines link. Of course, if you have more than 10 lines, you will need to look for the correct one.

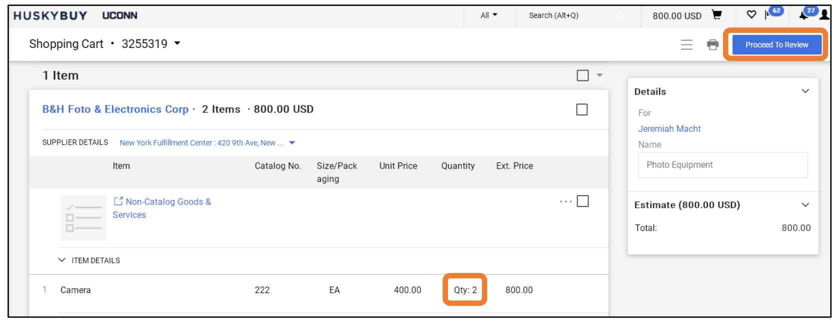
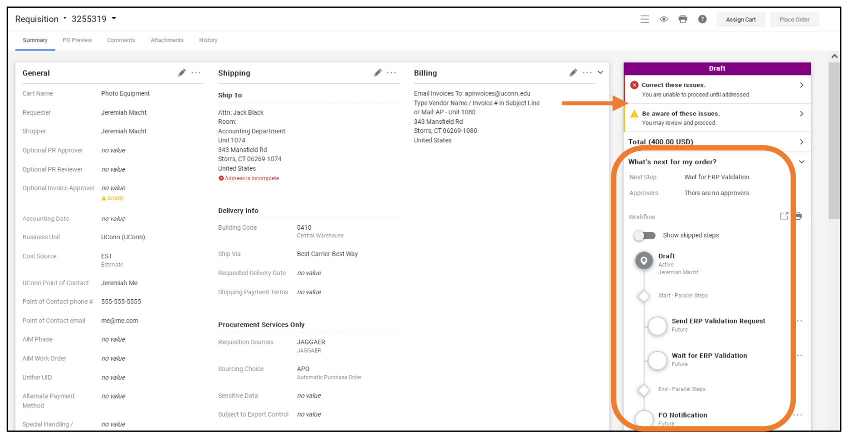
Notice the < Back to Cart link in the upper left corner. This is how you will return to your cart after making changes.</td><td></td></tr>
<tr><td>3</td><td>Change the quantity in the Quantity field.

(We are changing it from 100 to 150 here.)

When done, click on the Save Progress button to save your changes.

Then click on the < Back to Cart link in the upper left corner to return to your shopping cart with your new changes.

Note: Do NOT use the Next buttons when editing the Goods & Services Form from the Shopping Cart. Always use the < Back to Cart link in the upper left corner.</td><td></td></tr>
<tr><td>4</td><td>Be sure that you see the Success pop-up at the top of the screen after clicking on the Save Progress button above, and before clicking the < Back to Cart link.</td><td></td></tr>
</table>

Step	Action	Screenshot
Proceed to Review		
+	The quantity changes have been made to the order in the Shopping Cart. We are now ready to review the draft requisition. Click on the **Proceed to Review** button to display the details of the draft requisition.	
2	The draft requisition is displayed. If you have not yet setup your Profile Settings, you may see one or more flags in the status bar. If this happens, see the **Draft Requisitions** Job-Aid. **Note:** The PR Approval tab is no longer on the top navigation bar. The name has changed and has moved to the right sidebar under the **Place Order** button. It is now titled What's next for my order?	

HUSKYBUY UCONN

Support
(860) 486-2BUY (2289)
HuskyBuySupport@UConn.edu

Shopping with the Blanket Order Form

Overview This user-guide will assist you with filling out the Blanket Order form. Use this form for making long-term purchase orders for repeated deliveries of goods or services

General Rules Read the instructions on the first page of the form carefully.

This form will create a line item on a requisition once you submit the form. Attach any back-up documentation related to the purchase on the requisition. You can save the form at any time by selecting Save in the drop-down list in the upper right corner of the form and clicking **GO**.

If the supplier you wish to use is not listed in the supplier search, you must FIRST request a supplier using the **New Supplier Request form** located on the Home page. *(See the **Requesting Suppliers** Job-Aid if necessary.)*

All fields in **BOLD** indicate a required field.

Once the Blanket Order is on the requisition, and while you are filling out your accounting codes, you should **not** use the **split by amount of price** feature on the line. If you need to split accounts, you will need to choose **(%) of price**.

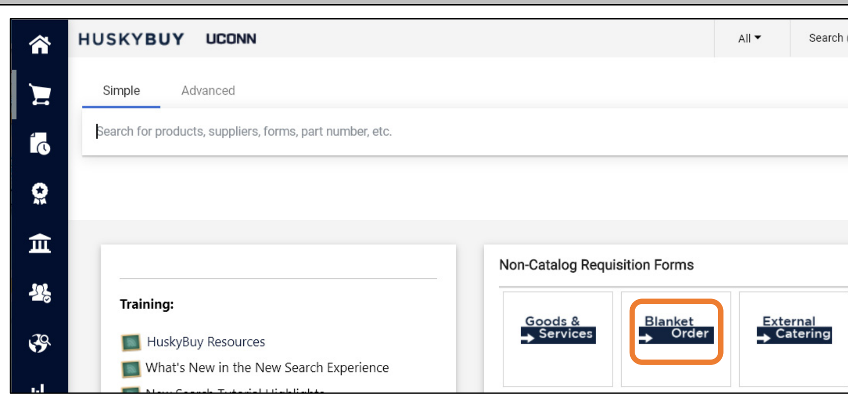
Related Job-Aids

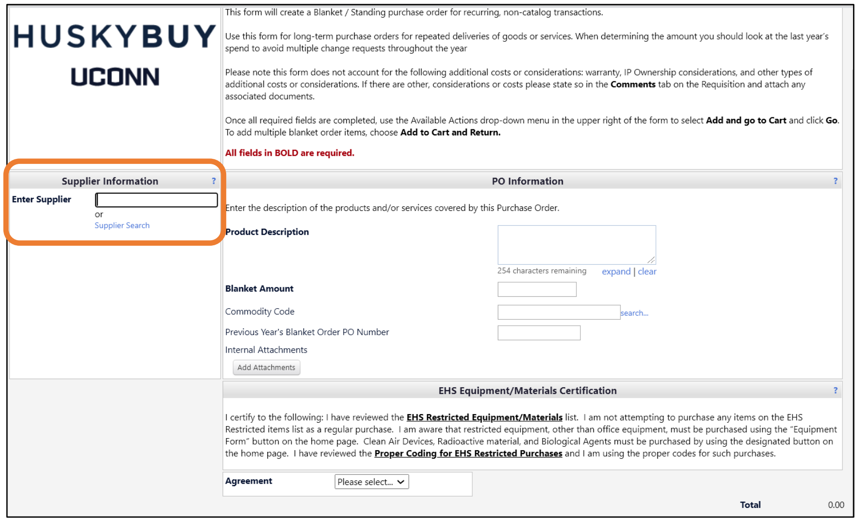
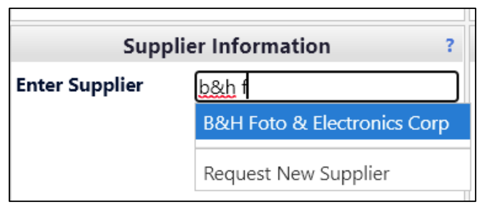
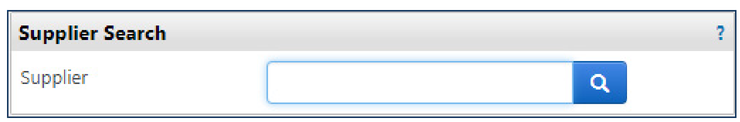
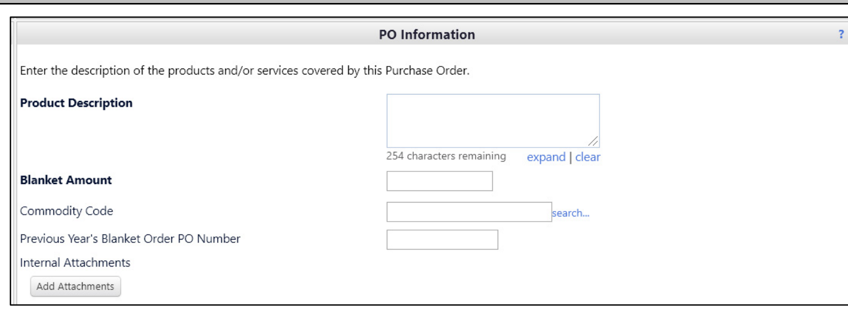
- Requesting Suppliers
- Draft Requisitions

Contents Included within this user-guide you will find:

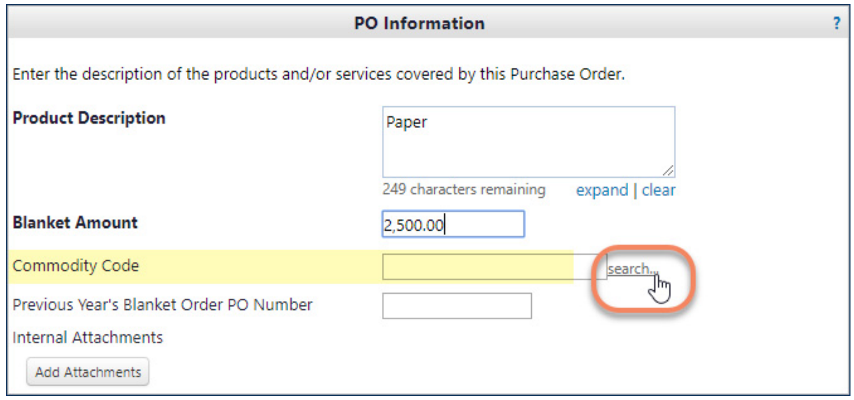
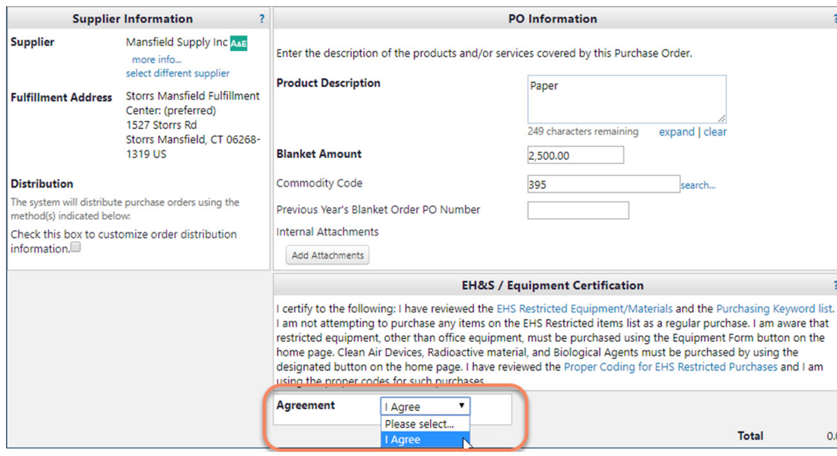
- *Select the Blanket Order Form*
- *Enter a Supplier*
- *Add the PO Information*
- *Add to Cart*

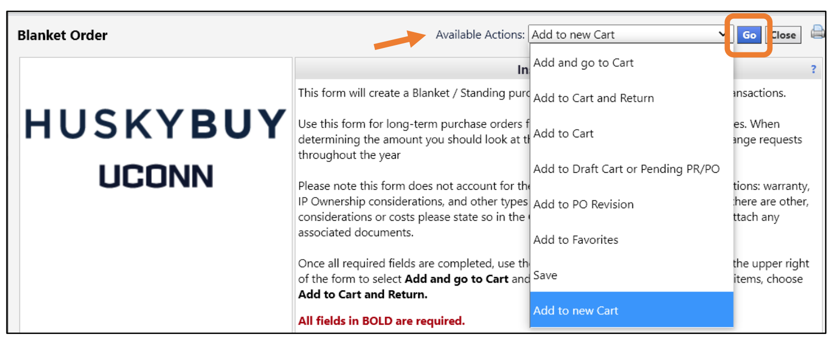
Process Steps:

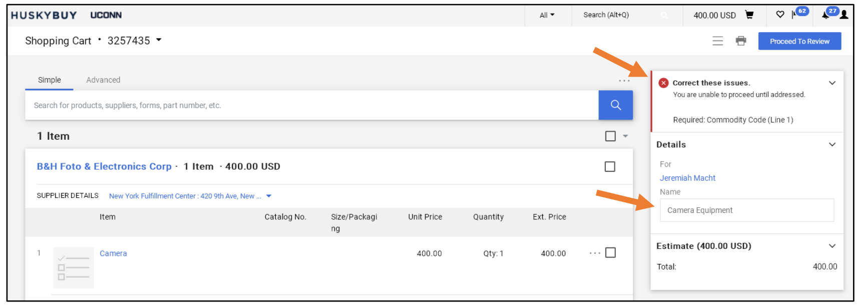
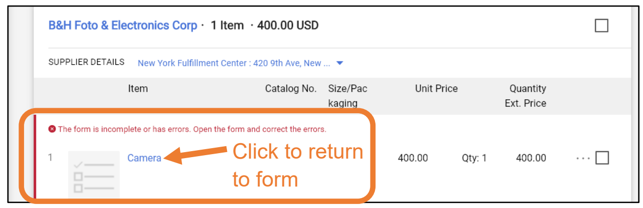
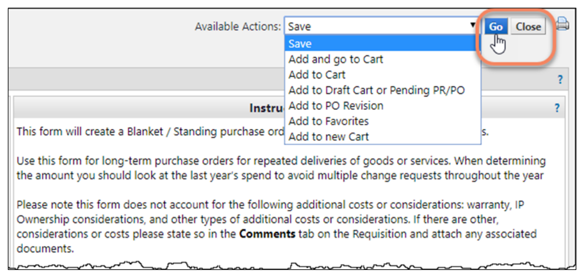
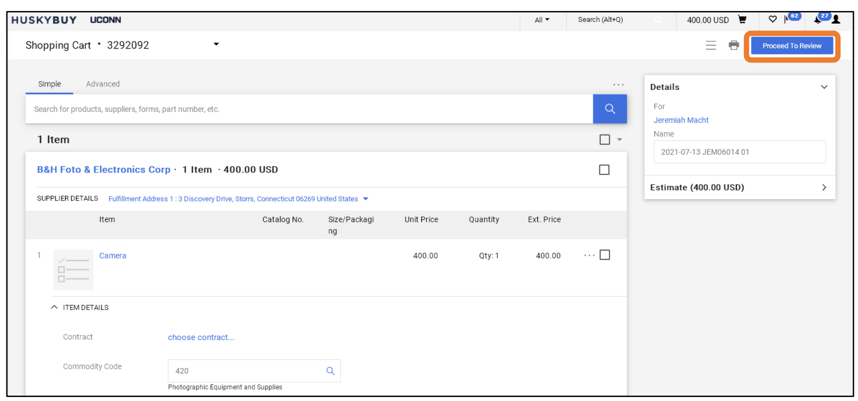
Step	Action	Screenshot
Select the Blanket Order Form		
1	At the Shopping home page of HuskyBuy, find the **Non-Catalog Requisition Forms** at the top of the page. Click on the **Blanket Order** form.	

Step	Action	Screenshot
2	Read the instructions carefully if this is the first time through the form. We will start with entering a supplier name, then entering the PO information, then submitting the form.	
Enter a Supplier		
1	Start entering the supplier name in the **Enter Supplier** field and a list of suppliers will start to appear -OR- an option to request a new supplier. You also have the option of clicking the **Supplier Search** link to search for a supplier (which does the same thing). Select the supplier from the list.	 
Add the PO Information		
1	With the supplier selected, add the Product Description and the Blanket Amount.	

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>2</td><td>Enter the Commodity Code for the item you are buying. You can use the Search… link if necessary.

Enter the previous year's Blanket PO Number if known, and any attachments necessary.</td><td>
</td></tr>
<tr><td>3</td><td>Read the EH&S / Equipment Certification section and select I Agree from the drop-down box.</td><td>
</td></tr>
<tr><td colspan="3">Add to Cart</td></tr>
<tr><td>1</td><td>At the top of the form, go to the Available Actions drop-down list and select the appropriate setting.

If you are done with the form, we suggest selecting Add to new Cart.</td><td>
</td></tr>
</table>

Step	Action	Screenshot
2	We recommend changing name of the shopping cart to something meaningful. ***Note:*** *You may have to go back to the form if you need to review or change. In this example we have a message to "Correct these issues" and "This form is incomplete…".* *To edit the form, click on the* ***Product Description*** *or on the form icon.*	
3	*If you made changes, select* ***Save*** *from the Available Actions list, and click* ***Go****.* *Next, you can just click* ***Close****.*	
4	If you are done, and everything looks good, click **Proceed to Review** to create a draft requisition for reviewing. See the related Job-Aid, Draft Requisitions, to complete the ordering process.	

HUSKYBUY UCONN

Cart Management

Support
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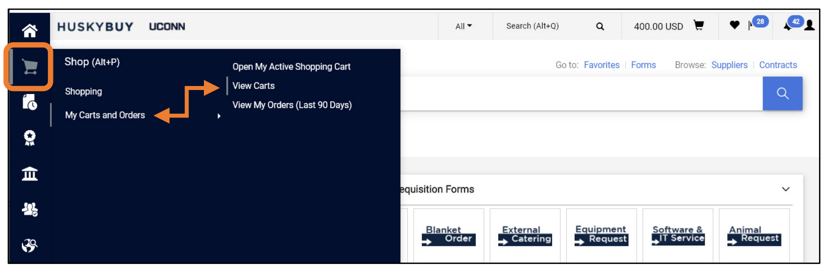
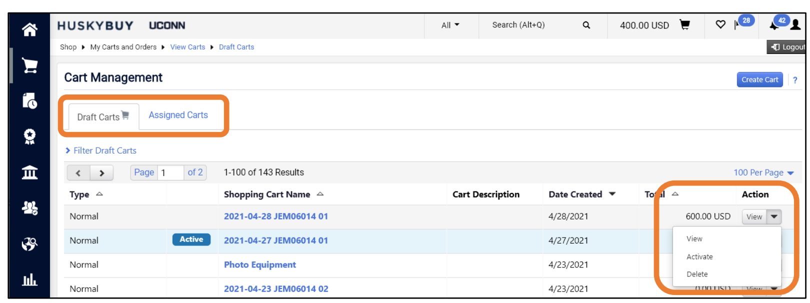
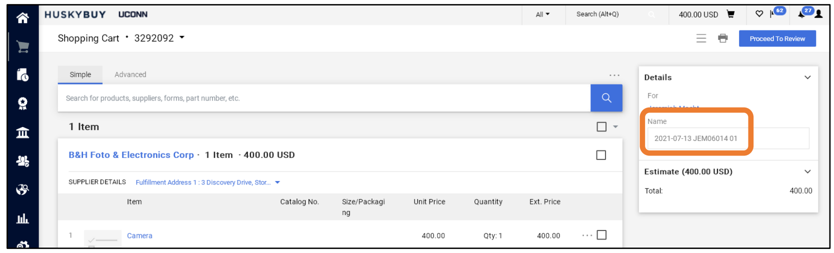
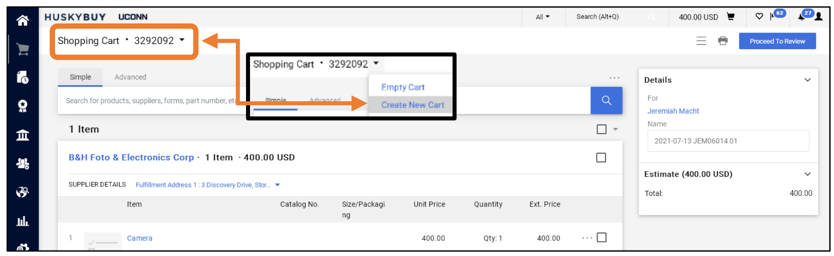
HuskyBuySupport@UConn.edu

Overview Carts can be created and saved as necessary. It is good practice to rename a cart with a meaningful name. It will make future searches much easier.

Contents Included within this user-guide you will find:

Process Steps:

Step	Action	Screenshot
Locating Draft Carts / Assigned Carts		
1	To view your shopping carts, use the icons on the left to go to **Shop > My Carts and Orders > View Carts**.	
2	On the Cart Management page, there are two tabs representing different types of carts: **Draft Carts**—lists carts that you created but have not assigned to a Requester yet, and carts returned to you either by a Requester or the system itself. Click on the Action dropdown (located to the right of the cart) to **View, Activate**, or **Delete** the cart. **Assigned Carts**—lists carts that you assigned to a Requester but the Requester has not submitted yet.	

Step	Action	Screenshot
Renaming and Saving a Cart to Drafts		
1	By default, carts will be named by Date, UserID, and sequence number. For example: 2018-06-05 ras16111 01. While viewing your shopping cart, you can name it under **Name this cart.** This will save automatically. This will then be added to your **Drafts**.	
Creating New Carts		
1	After saving a cart to your Drafts, you can click on the Create New Cart button under the **Shopping Cart** link/dropdown menu to start a new cart.	
Once the Requester has processed and submitted the cart you assigned, it will no longer be listed on the carts page. Completed carts become requisitions and are shown under **Shop > My Carts and Orders > View My Orders** (Last 90 Days).		

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Assigning and Unassigning Carts

Overview Once you have completed shopping, assign the cart to the desired Requester or Approver. Assigned carts can be unassigned if you need to edit the cart or change the Requester.

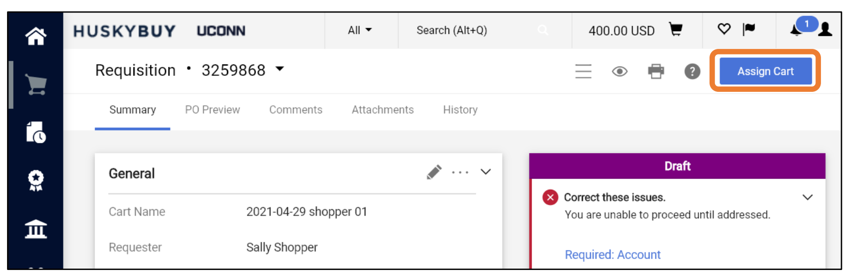
Related Job Aids Other Job-aids you may want to review include:

- Setting your Profile Preferences

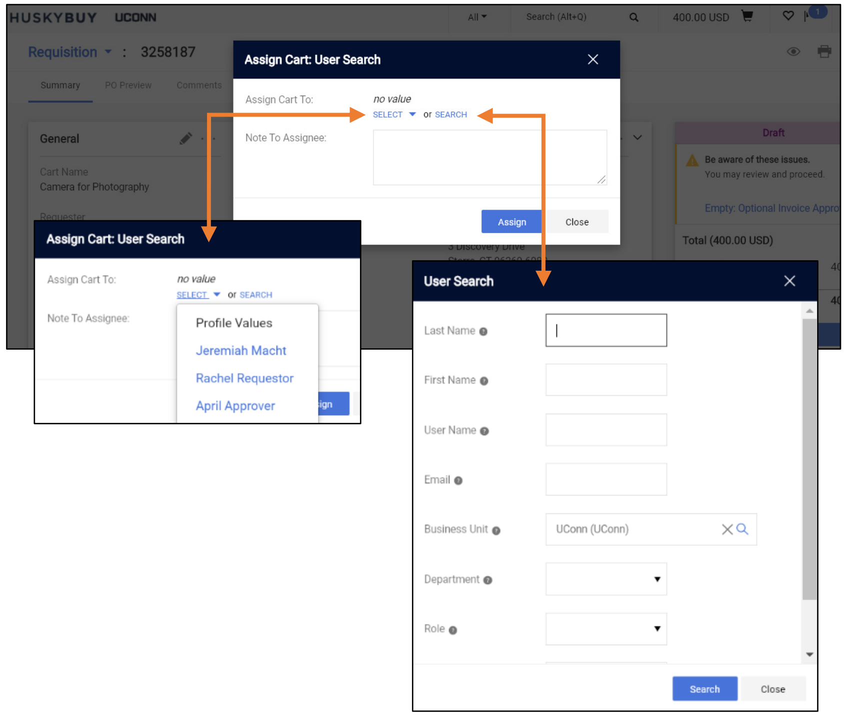
Contents Included within this user-guide you will find:

Additional Processes The shopper can populate the accounting string and other requisition elements, but is not required to.

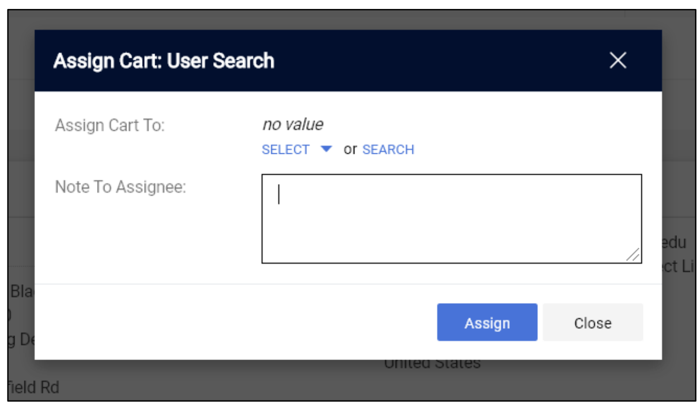
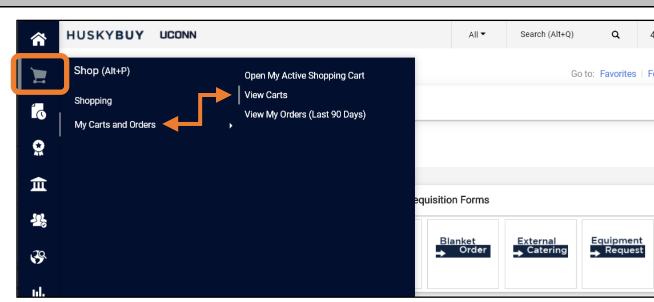
Process Steps:

Step	Action	Screenshot
Assigning a cart		
1	Access the shopping cart and then click on the **Assign Cart** button located in the status sidebar. (You are not required to populate the accounting string or other requisition elements to continue if you are a shopper.)	

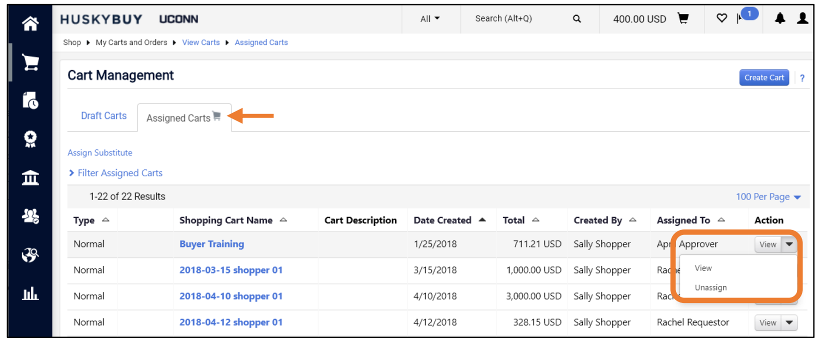
<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>2</td><td>A window will appear.

Specify the Requester.
If you do not have any Requesters saved in your profile:
Search for the assignee you will assign the cart to by clicking the SEARCH link.
In the pop up window, enter the name of the Requester.
From the results listing, select your Requester.
If you have the Requester saved to your profile:
Click the SELECT link. Use the dropdown to display a listing of Requesters you previously saved to your profile. You may choose a Requester from this listing to assign your cart to the person.</td><td>
</td></tr>
<tr><td>3</td><td>You can enter a comment for the Requester if needed in the Note to Assignee box.

Click the Assign button.

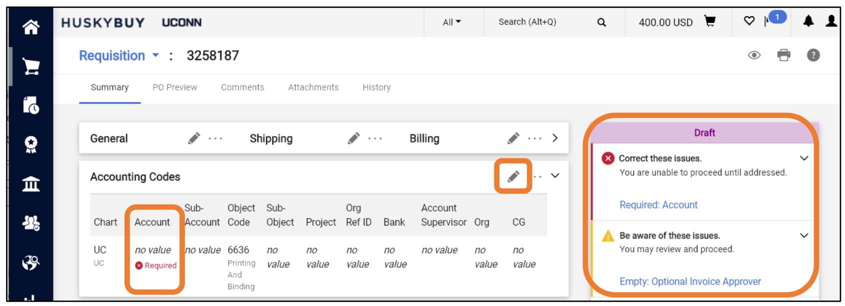
HuskyBuy will send an email notification of the assigned shopping cart to the Requester, depending on how your personal profile notifications are set. (Please refer to the "Setting your Profile Preferences" Job-Aid to customize notifications within your personal profile.)</td><td>
</td></tr>
<tr><td colspan="3">Unassigning a Cart</td></tr>
<tr><td>1</td><td>Use the icons on the left to go to Shop > My Carts and Orders > View Carts.</td><td>
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>2</td><td>On the Cart Management page, click on the Assigned Carts tab and locate the cart.

Click on the Action dropdown (located to the right of the cart), and select Unassign.</td><td>
</td></tr>
<tr><td colspan="3">Missing Information</td></tr>
<tr><td>1</td><td>Missing information, such as Accounting codes, will appear as an error (❌) the status sidebar.

Enter the missing information as needed by either clicking on one of the Required field links, or choosing the edit (✏) button on the right side.

The Correct these issues message needs to be fixed before submitting the order. The Be aware of these issues message is just a warning and is not required to submit order.

(You do not need to enter this to assign a cart, if you are a shopper.)</td><td>
</td></tr>
</table>

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Requestor Assigned Shopping Carts

Overview

The following user-guide is for those individuals appointed as a Requester.

Requesters must retrieve Shopping Carts assigned to them by Shoppers. Shoppers specify one person to be the Requester for their cart, and action must be taken before the cart can be routed for approval as a requisition.

Other Job Aids

Other Job-aids you may want to review include:

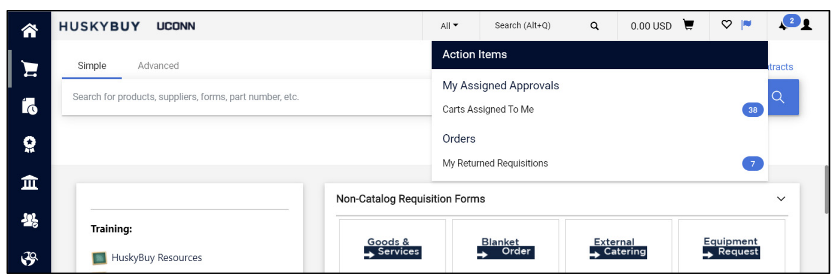
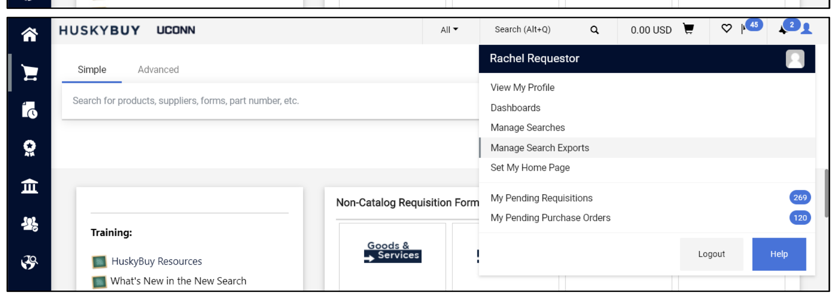
- Shopping with Catalogs
- Cart Management

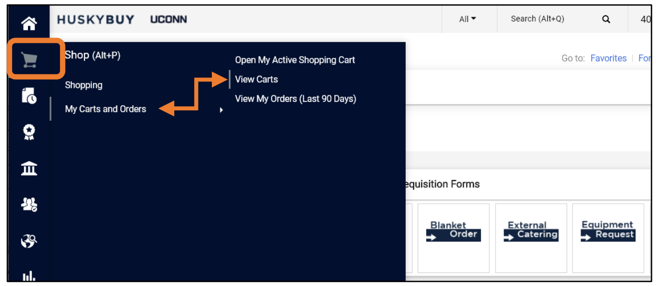
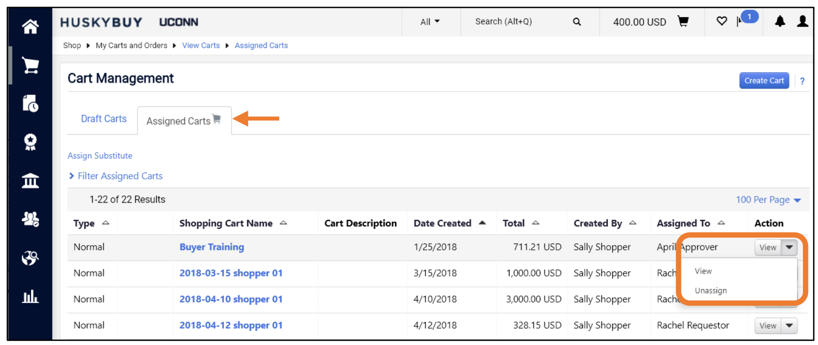
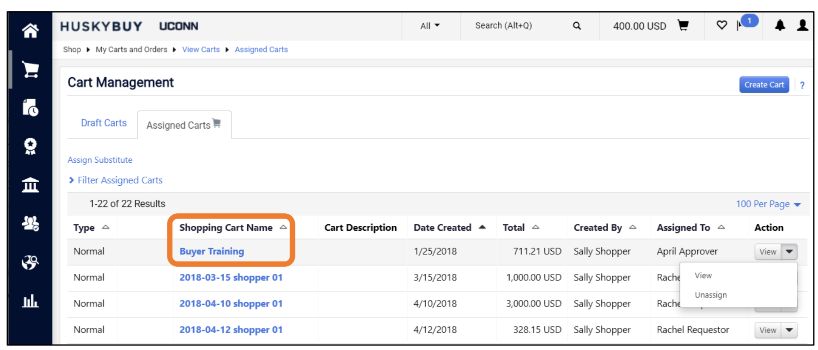
Contents

Included within this user-guide you will find:

- *Reviewing pending, recent, and action items*
- *Retrieving carts requiring action*

Process Steps:

Step	Action	Screenshot
Reviewing pending, recent, and action items		
1	Using the links at the top navigation menu, you can review **Action Items** ( ) that require your review and possible action from you. You can also review the status of your documents that you created in the menu under your profile icon.	 

Step	Action	Screenshot
Retrieving carts requiring action		
When placing an order for a Shopper, always carefully review any information the Shopper may have entered such as the Ship To Address, Building Code, Commodity and Accounting Codes. Ensure that this information is accurate before placing the order.		
1	To retrieve an assigned cart, use the icons on the left to go to **Shop > My Carts and Orders > View Carts**.	
2	On the Cart Management page, there are two tabs representing different types of carts: **Draft Carts**—lists draft carts that you created and requisitions that have been returned to you by an approver for action. Click on the Action dropdown (to the right of the cart) to View, Activate, or Delete the cart. **Assigned Carts**—lists carts that have been assigned to you by Shoppers. These carts require action. Click on the Action dropdown (to the right of the cart) to View, Activate, or Delete the cart, or Return the cart to the Shopper.	
3	Click on any Shopping Cart's Name to begin editing the cart.	

HUSKYBUY UCONN

Draft Requisitions

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Overview This user-guide will assist you with correcting errors that might occur after sending a shopping cart to a draft requisition for review.

Related Job-Aids

- Setting your Profile Preferences
- Setting your Notification Preferences
- Requisition Approval

Contents Included within this user-guide you will find:

- *Correcting the Shipping Address*
- *Correcting the Accounting Codes*
- *Adding an Optional PR Approver*

Action Items:

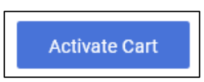
Sidebar Hide/Show Icon: Display the status sidebar to the right or hide it to allow for more screen space.

Eye Icon: Filter/arrange your screen in a manner that will allow you to focus on line items, accounting codes, etc.

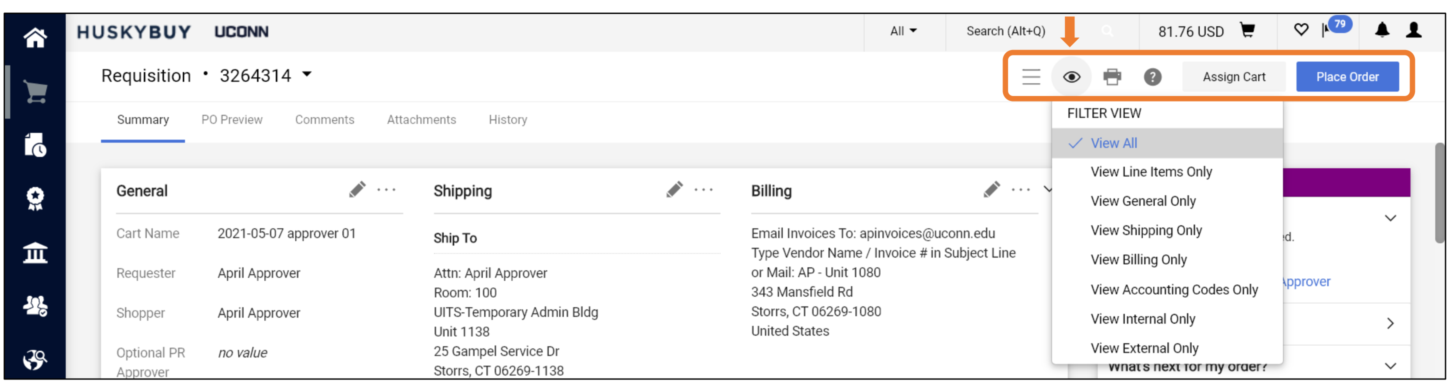
Print Icon: Print the current page .

Help Icon: Quick reference to functionality of current page.

You can either **Assign** a draft cart/requisition to a Requester or Approver or **Place** the current order.



You may also notice the Activate Cart button if you go into a cart that is not your current active cart.

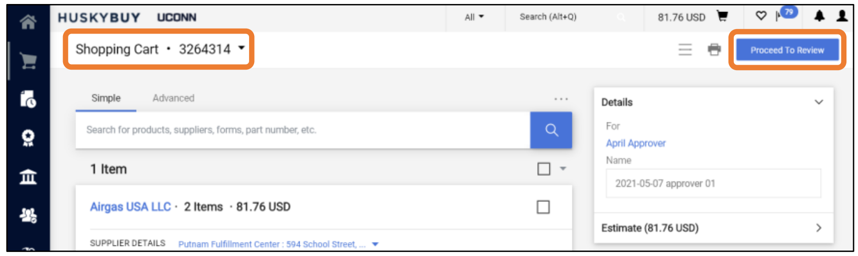


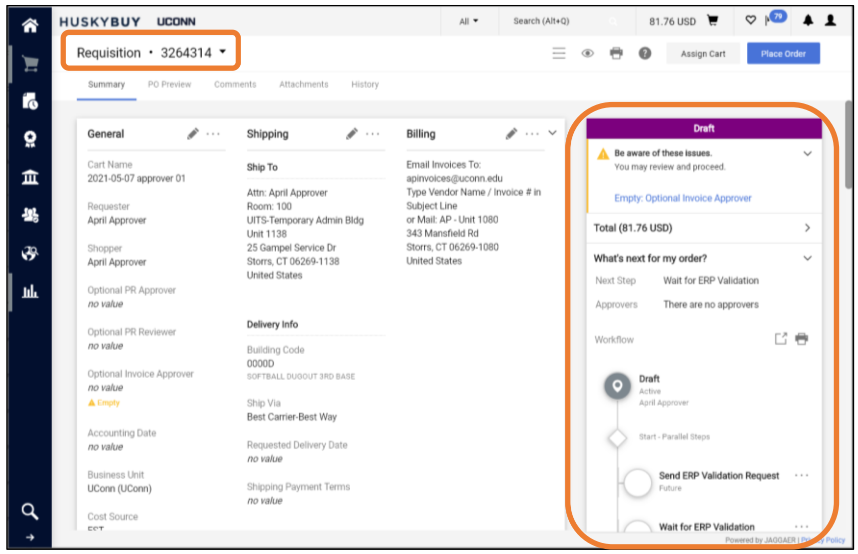
Process Steps:

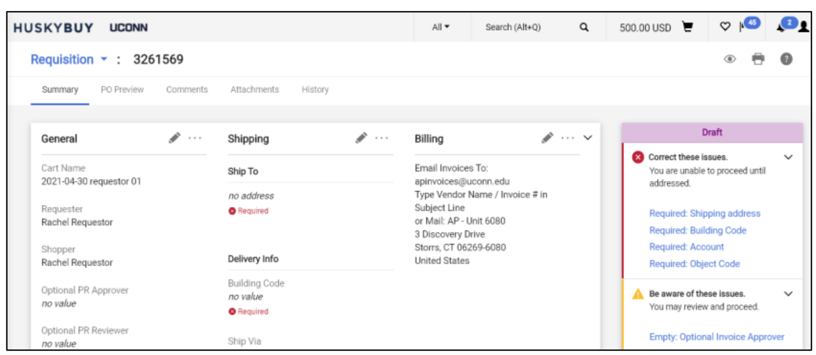
<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>1</td><td>A Draft Requisition is created when you fill up your shopping cart and click Proceed to Review. Notice the document type and number.

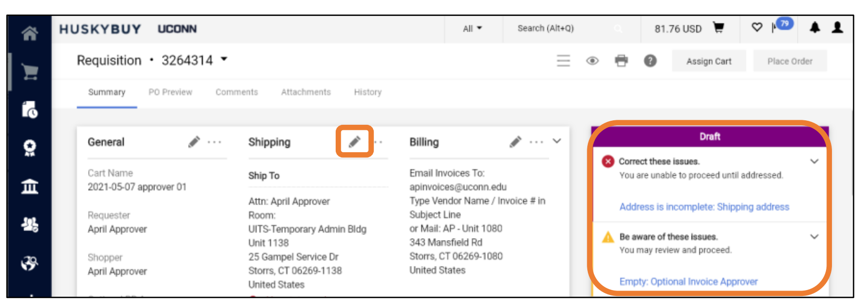
It will remain a Draft Requisition until it has been submitted by a Requestor or an Approver.

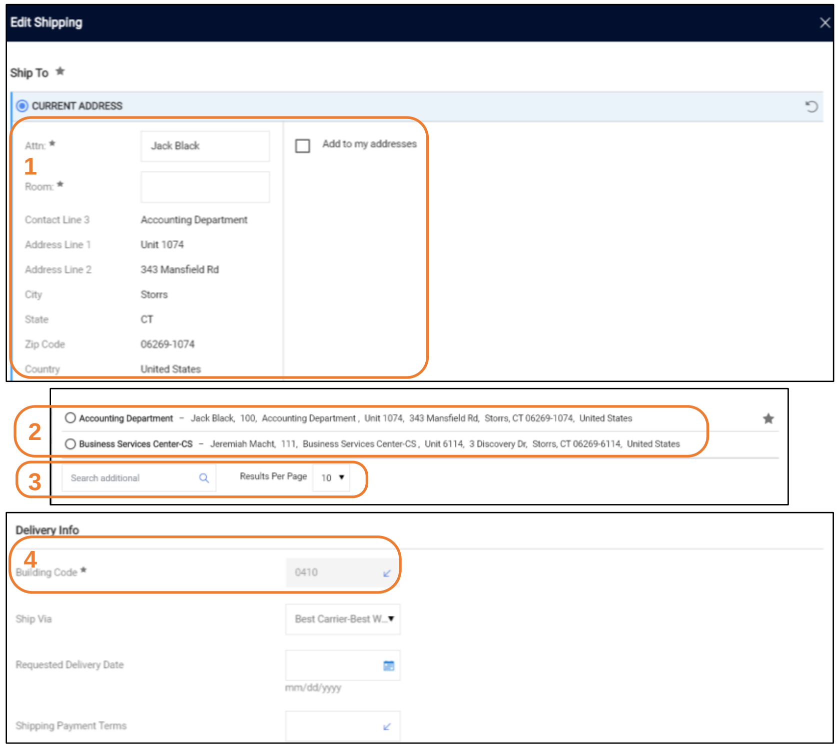
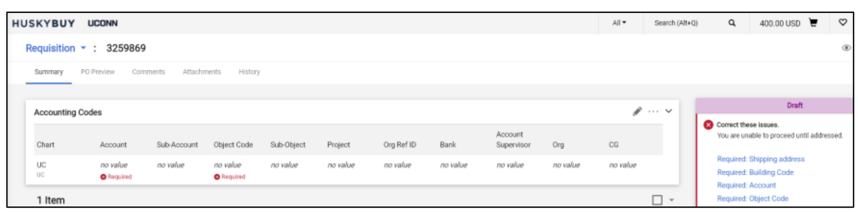
The first view you see of the Draft Requisition will be different for almost everybody, due to their role and their profile setup.

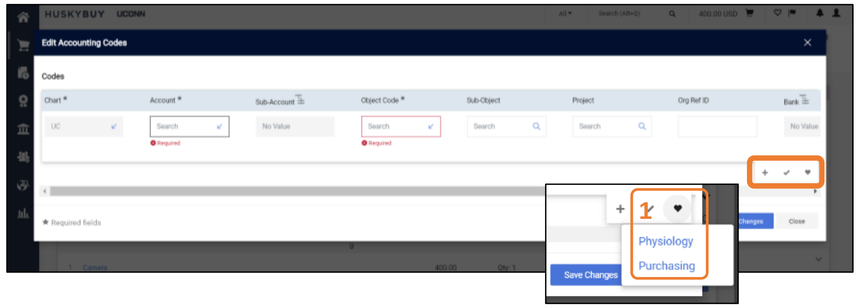
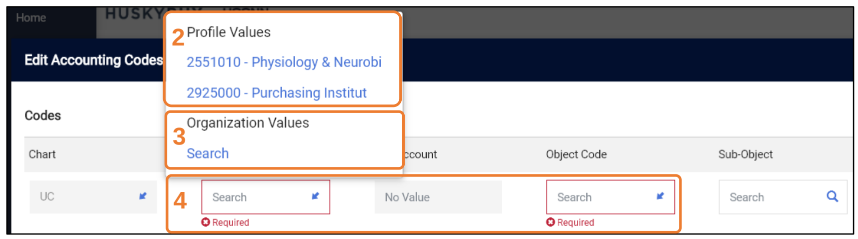
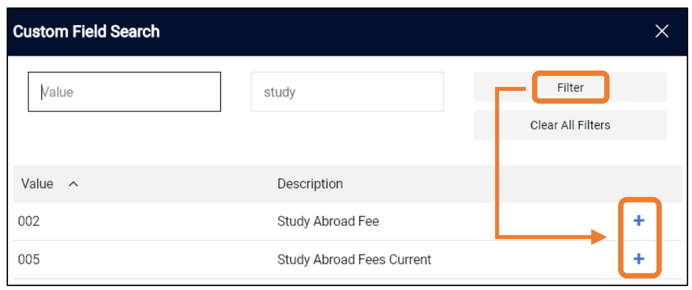
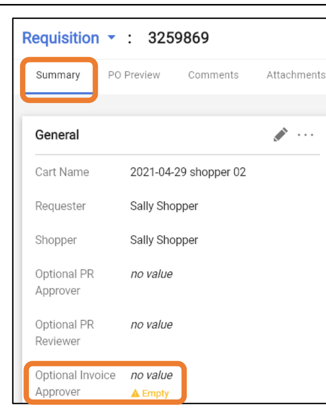
The right of the Draft Requisition will show the Status Sidebar to indicate problem areas, total amount and workflow status. Once the requisition has been submitted and approved, you will also see a Related Documents section to display Purchase Order and Invoice numbers.</td><td>

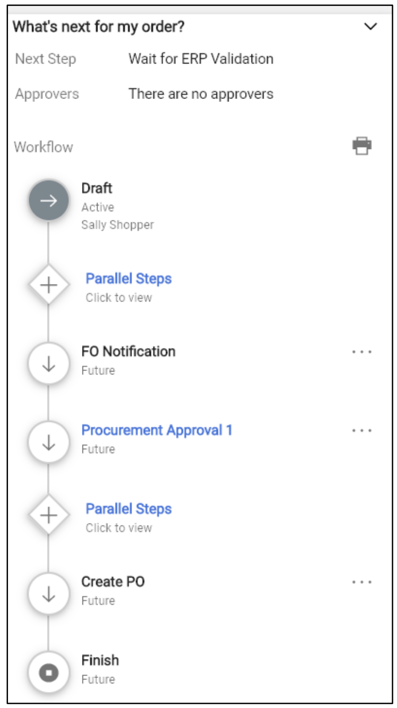
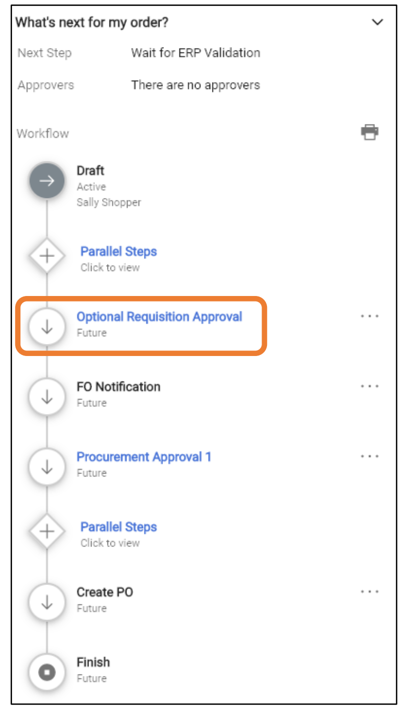
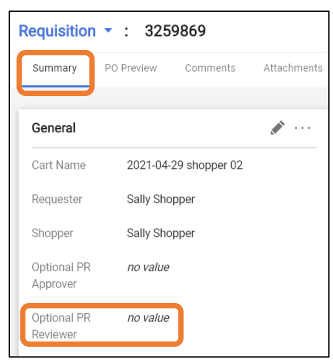
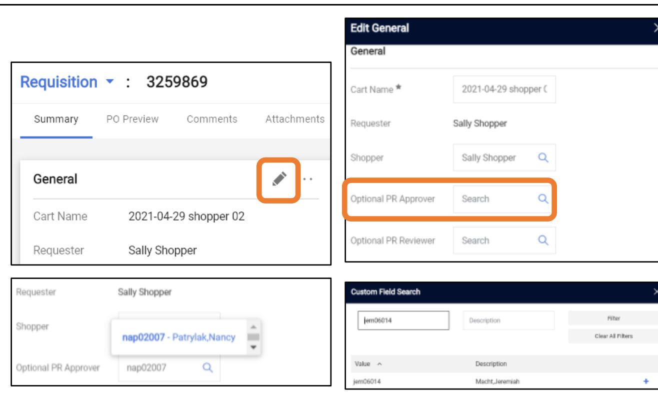

</td></tr>
<tr><td colspan="3">Please note that most of these initial errors can be corrected by setting up your Profile Preferences with your shopping defaults such as Default/Alternate Shipping Address and Default Accounting Codes. See the Related Job-Aids referenced above.</td></tr>
<tr><td colspan="3">Correcting the Shipping Address</td></tr>
<tr><td>1</td><td>The most common errors on a new Draft Cart are missing shipping information, as you can see from the status sidebar at the right of the page.

To correct the error, click on either one of the Correct these issues Required: links from the status sidebar or click on the edit pencil icon.</td><td>

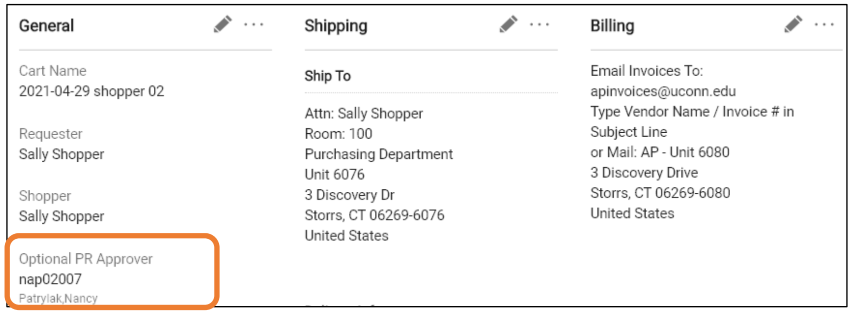

</td></tr>
</table>

Step	Action	Screenshot
2	The **Edit Shipping** screen displays. Here you have choices: 1. If you have your default profile address setup in your profile, it will be prepopulated. a. The attention and room lines are editable and required. You can setup a default attention and room number in your profile to display automatically. (Click **Add to my addresses** to save this address to your profile.) 2. Or, you can **select** from your alternate addresses if they are setup in your profile. 3. Or, you can **search** for your address and select it from the search results. 4. The **Delivery Info** section needs to have a **Building Code** assigned which can also be setup in your profile. (That can be found in Default User Settings > Custom Field and Accounting Code Defaults.)	
Correcting the Accounting Codes		
1	To correct the Accounting Codes, either click on any of the Required field links or the pencil edit icon.	

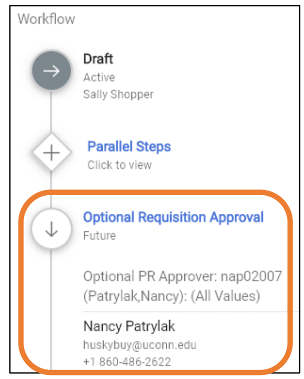
Step	Action	Screenshot
2	Again, we have choices: 1. We can choose a code set from our favorites. *(See the "Setting your Profile Preferences" Job-Aid.)* 2. We can select an Account Code and an Object Code from our preferred list in our profile. *(See the "Setting your Profile Preferences" Job-Aid.)* 3. We can search for an Account Code and an Object Code from the system using search criteria as shown in the lower picture. Click the blue plus select botton. 4. Or, you can enter the codes directly if you know what they are. When you are done, click on Save. **Note:** There are many fields on the Edit Accounting Codes window. You may need to scroll to the right in order to see the remaining accounting fields. **Note:** Once you hover your mouse over the screen you will notice these icons: + = Add a Split Account Code ✔ = Recalculate/Validate Codes ♥ = Code Favorites **Note:** The account fields have either an arrow or a magnifying glass. = Code Default Present = Search for Code	
3	When the errors are corrected, click back on the **Summary** tab. You will notice that you have the option to assign an ***Optional Invoice Approver*** at this point. More importantly, you have the option to also assign an **Optional PR Approver**. The next section will discuss this option.	

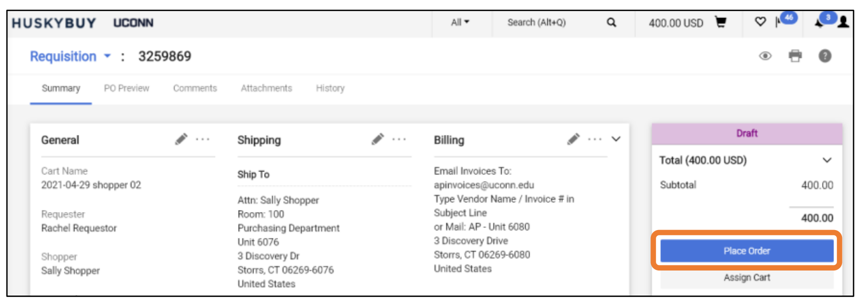
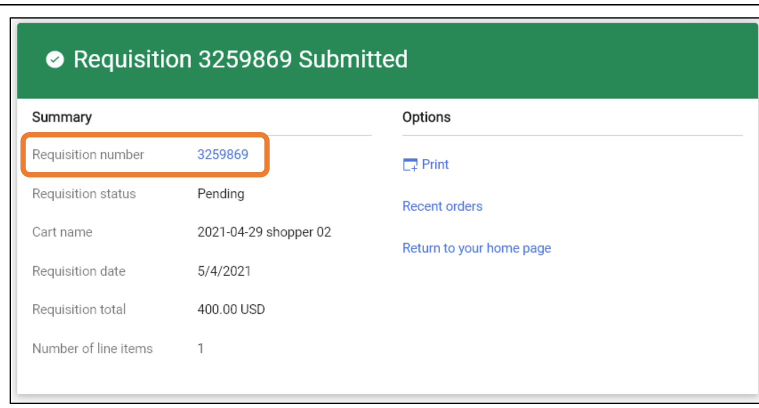
Step	Action	Screenshot
Adding an Optional PR Approver		
All requisition documents will follow a standard workflow path. In the most basic iteration, that workflow would include either an **FO notification** or an **FO Approval** (based on the value being > or < $5000), plus any approvals specific to that order (EHS, Asset Approval, etc.). You have the option of inserting another approval step *(the **Optional PR Approver**)* if you find it necessary.		
1	In the status sidebar, view the **What's next for my order?** section *(formally PR Approvals tab)* to see the current workflow for your requisition. Add your **Optional PR Approver** and review the workflow status again. *See below to add the Optional PR Approver.*	 
2	To add an **Optional PR Approver**, click back on the Requisition and the **Summary** tab again.	
3	In the General area, click on the pencil edit button to display the **Edit General** pop-up. If you know the approver's NetID, you can just type it in. Otherwise, click on the magnifying glass to search. Select the desired approver by clicking the blue plus select button. When done, click Save Changes at the bottom of the **Custom Field Search** and **Edit General** windows.	

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>4</td><td>When done, The Optional PR Approver will be listed

All three sections (General, Shipping, and Billing) can modified by clicking on the pencil edit button in the upper right corner of each section.</td><td>
</td></tr>
<tr><td>5</td><td>Please Note: By adding this Optional Approver step, you are adding an additional single Approver for review, not a group of Approvers.

It’s worth noting, however, that Approvers can forward a document between each other prior to taking an approval action should more than one individual need to review it.

By applying a valid user to this field (can only select from users with at the Approver role), an additional stop is added to the workflow for that document, prior to FO Approval.</td><td>
</td></tr>
<tr><td>6</td><td>When everything looks good, click on the Place Order button to submit the Purchase Requisition (PR) and initiate the workflow approvals.

Note: If you only have the Shopper role, you will only be able to Assign Cart to a Requestor or an Approver.</td><td>
</td></tr>
<tr><td>7</td><td>After submission, you are assigned a PR number and a display of possible next steps will appear.</td><td>
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>8</td><td>

You can always find your PR by clicking on **Shop > My Carts and Orders > View My Orders (Last 90 Days)**

From the list that displays, you can add or remove filters to display your desired results. Then click on the number to re-open the requisition.

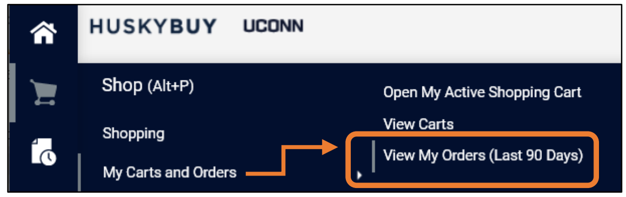
When you are in the Requisition, you now know that you can click on the **What's next for my order?** section *(formally PR Approvals tab)* to view the approval progress.

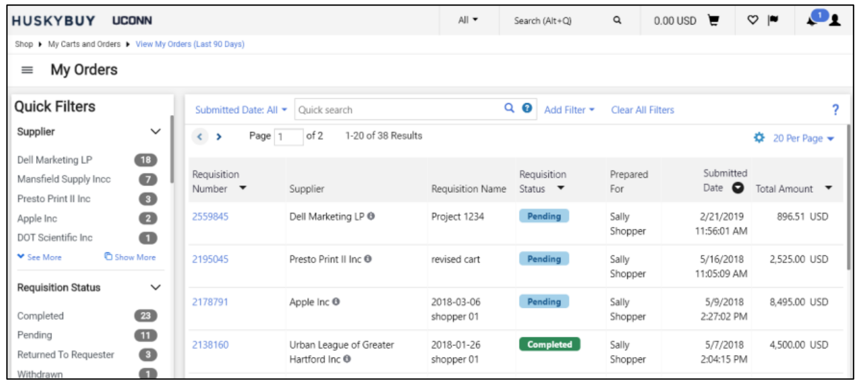
To view the approvers on each workflow step, simply click on the workflow arrow.

This will allow you to see the list of approvers in case you need to follow up or expedite the process.

Note: If you are an Approver, see the Requisition Approval Job-Aid for information on how to continue with the Approval process.

</td><td>





</td></tr>
</table>

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HUSKYBUY UCONN

Disbursement Vouchers

Support
(860) 486-2BUY (2289)
HuskyBuySupport@UConn.edu

Overview Disbursement Vouchers (once created through KFS), will now be created within the HuskyBuy Portal.

Other Job Aides Other Job-aides you may want to review include:

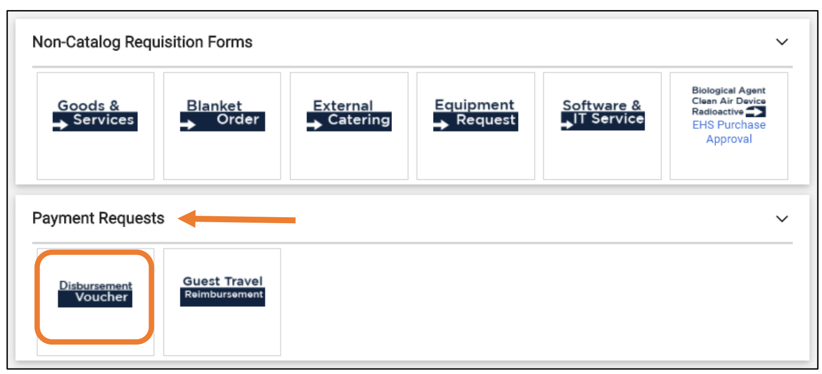
- Cart management
- Shopping with Catalogs

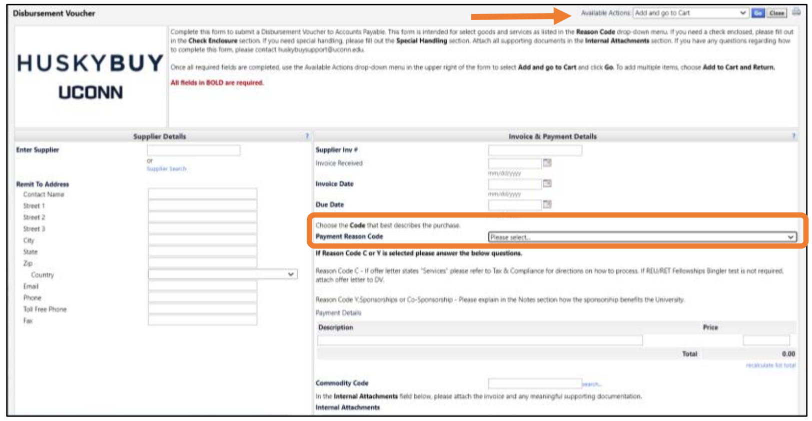
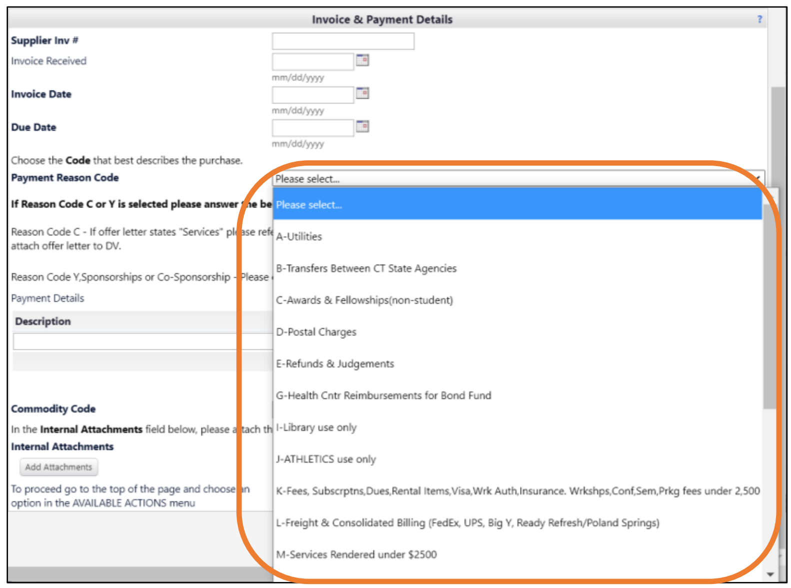
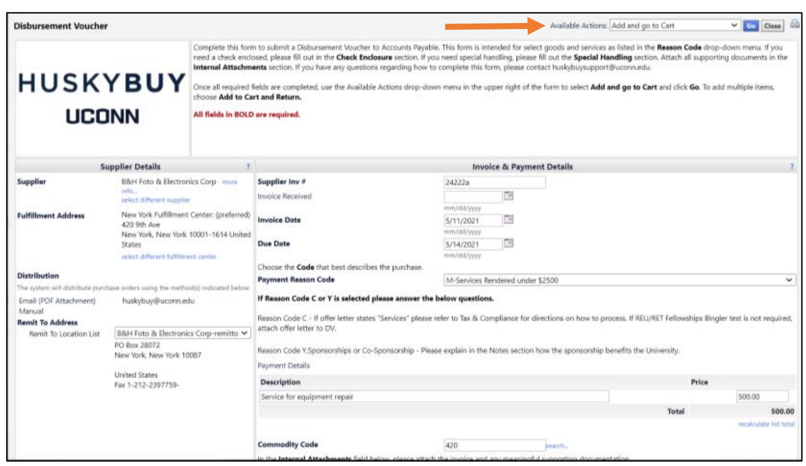
Additional Processes A disbursement voucher that is under $2500 will automatically go through the workflow process.

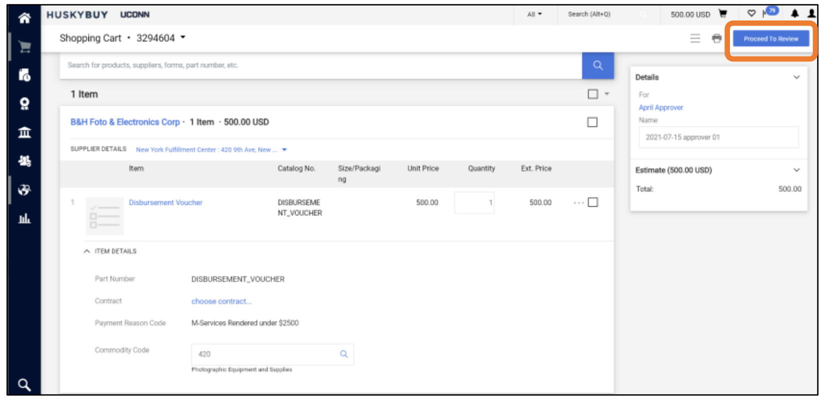
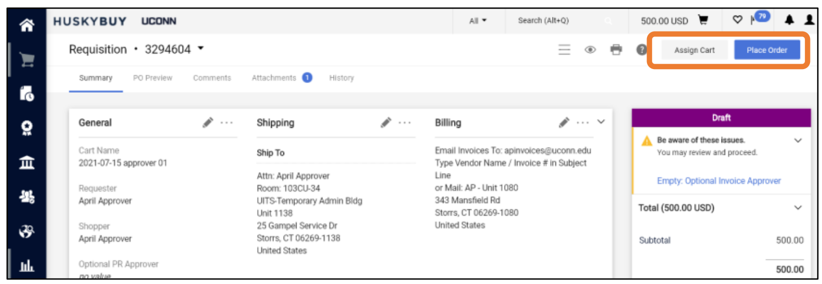
Contents Included within this user-guide you will find:

- *Creating a Disbursement Voucher*
- *Submitting the Disbursement Voucher*

Process Steps:

Step	Action	Screenshot
Creating a Disbursement Voucher		
1	To create a disbursement voucher, you will utilize the forms within the HuskyBuy portal. Within the Payment Requests forms, chose the correct Disbursement Voucher form. The Guest Travel form is not addressed in this job aid.	

Step	Action	Screenshot
2	Complete this form to submit a **Disbursement Voucher** to Accounts Payable. Please select the correct supplier and remit to address. If the supplier, you want is not available or the remit is not correct you will have to request a new supplier request.	
3	This DV form is intended for select goods and services as listed in the **Payment Reason Code** drop-down menu. Attach all supporting documents in the Internal Attachments section. Supporting documents must include the supplier name, remit address and dollar amount being paid so AP can audit your entry. If you are paying an honorarium and the payment includes a reimbursement, please add a separate line with the proper object code for the reimbursement. If you have any questions regarding how to complete this form, please contact HuskyBuySupport@UConn.edu.	
4	Once all required fields are completed, use the Available Actions drop-down menu in the upper right of the form to select **Add to New Cart** or to add multiple items, choose **Add to Cart and Return** and click **Go.**	

Step	Action	Screenshot
Submitting the Disbursement Voucher		
1	Once the Disbursement Voucher (DV) has been added to the cart, access your cart to finish submitting the DV. Click **Proceed to Review**. Then click **Assign Cart** or **Place Order** to finish the process as you would with a requisition. The system will create a PO behind the scenes, but this PO will not go to the supplier. An invoice will be created and forward to AP as a Disbursement Voucher. **Note:** Due to the special way Disbursement Vouchers create "fake" POs, amendments to these POs are not allowed.	 

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(860) 486-2BUY (2289)
HuskyBuySupport@UConn.edu

HUSKYBUY UCONN

Requisition Quick-Tips Guide

Overview This user-guide will assist you with some quick tips on navigating and editing a requisition document.

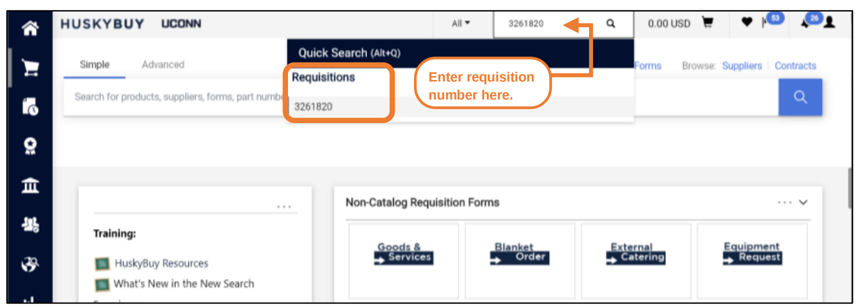
Related Job-Aids [Document Searches](#)

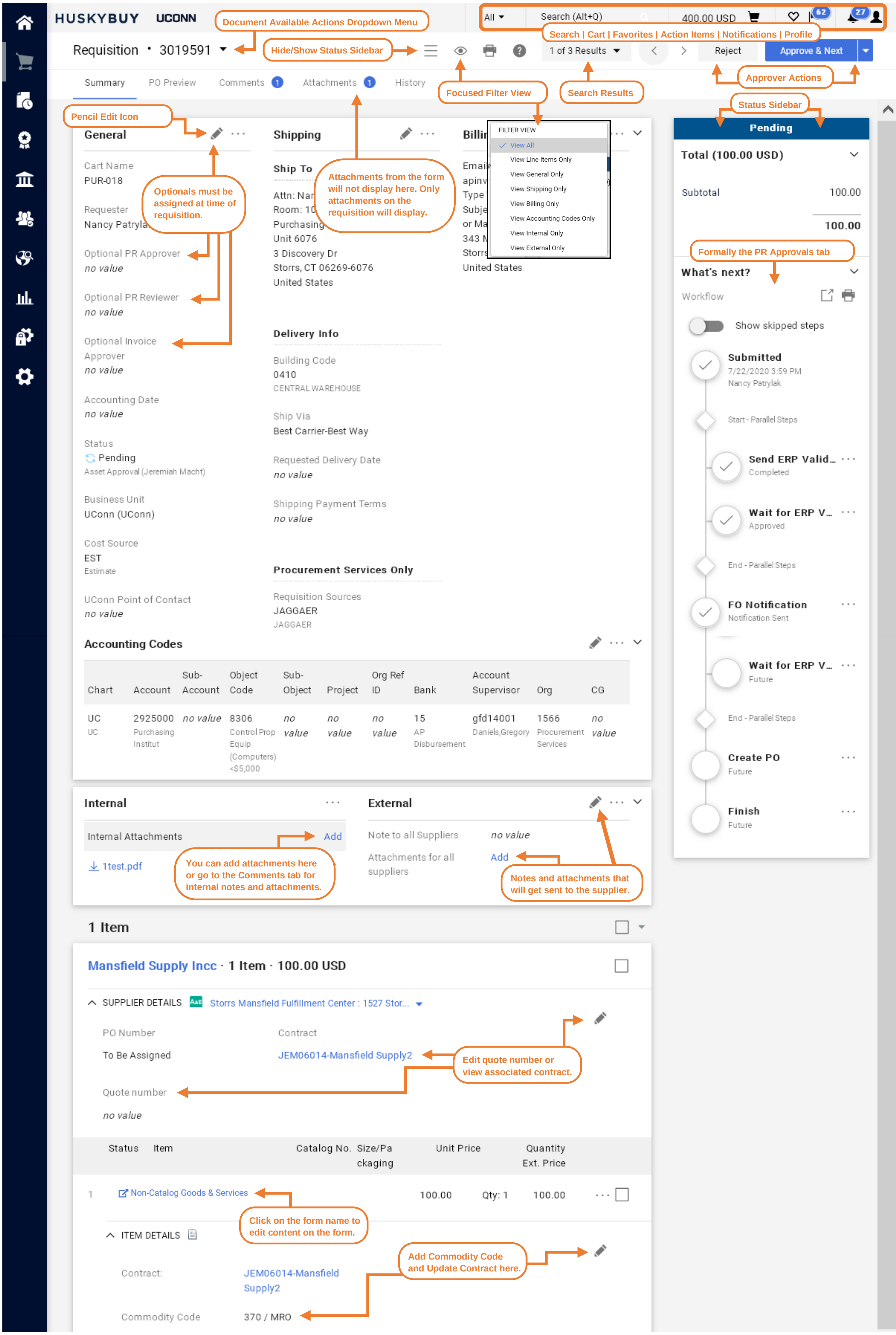
[Draft Requisitions](#)

Contents Included within this user-guide you will find:

- *Find the Requisition*
- *Navigating the Purchase Requisition in HuskyBuy*

Process Steps:

Step	Action	Screenshot
Find the Requisition		
1	If you know the Purchase Requisition (PR) number, the fastest way to get to it is to enter it into the Search box at the top of the page and **Enter**. I like this method because it tells you right away if a PO or an invoice was created. In this case, I know the PR has not yet been approved.	
2	This example shows a PR that has already gone to a PO. See the Document Searches Job-Aid for more ways to search for PRs in HuskyBuy.	
Navigating the Purchase Requisition in HuskyBuy		
1	The diagram below is a one-page guide on how and where to find information and make edits on a PR in HuskyBuy.	**See diagram below**


HUSKYBUY UCONN
Document Available Actions Dropdown Menu
Search (Alt+Q)
400.00 USD
Search | Cart | Favorites | Action Items | Notifications | Profile
Requisition • 3019591
Hide/Show Status Sidebar
1 of 3 Results
Reject
Approve & Next
Approver Actions
Summary
PO Preview
Comments
Attachments
History
Focused Filter View
Search Results
Status Sidebar
Pencil Edit Icon
General
Shipping
FILTER VIEW
View All
View Line Items Only
View General Only
View Shipping Only
View Billing Only
View Accounting Codes Only
View Internal Only
View External Only
Pending
Total (100.00 USD)
Subtotal 100.00
100.00
Cart Name
PUR-018
Ship To
Attachments from the form will not display here. Only attachments on the requisition will display.
Optionals must be assigned at time of requisition.
Requester
Nancy Patryla
Optional PR Approver
no value
Optional PR Reviewer
no value
Optional Invoice Approver
no value
Accounting Date
no value
Status
Pending
Asset Approval (Jeremiah Macht)
Business Unit
UConn (UConn)
Cost Source
EST
Estimate
UConn Point of Contact
no value
Unit 6076
3 Discovery Dr
Storrs, CT 06269-6076
United States
Delivery Info
Building Code
0410
CENTRAL WAREHOUSE
Ship Via
Best Carrier-Best Way
Requested Delivery Date
no value
Shipping Payment Terms
no value
Procurement Services Only
Requisition Sources
JAGGAER
JAGGAER
Formally the PR Approvals tab
What's next?
Workflow
Show skipped steps
Submitted
7/22/2020 3:59 PM
Nancy Patrylak
Start - Parallel Steps
Send ERP Valid...
Completed
Wait for ERP V...
Approved
End - Parallel Steps
FO Notification
Notification Sent
Wait for ERP V...
Future
End - Parallel Steps
Create PO
Future
Finish
Future
Accounting Codes
Chart
Account
Sub-Account
Object Code
Sub-Object
Project
Org Ref ID
Bank
Account Supervisor
Org
CG
UC
2925000
no value
8306
no value
no value
no value
15
gfd14001
1566
no value
Purchasing Institut
Control Prop Equip (Computers) <$5,000
AP Disbursement
Daniels,Gregory
Procurement Services
Internal
Internal Attachments
Add
1test.pdf
You can add attachments here or go to the Comments tab for internal notes and attachments.
External
Note to all Suppliers
no value
Attachments for all suppliers
Add
Notes and attachments that will get sent to the supplier.
1 Item
Mansfield Supply Incc · 1 Item · 100.00 USD
SUPPLIER DETAILS
Storrs Mansfield Fulfillment Center : 1527 Stor...
PO Number
To Be Assigned
Contract
JEM06014-Mansfield Supply2
Edit quote number or view associated contract.
Quote number
no value
Status
Item
Catalog No.
Size/Packaging
Unit Price
Quantity
Ext. Price
Non-Catalog Goods & Services
100.00
Qty: 1
100.00
Click on the form name to edit content on the form.
ITEM DETAILS
Add Commodity Code and Update Contract here.
Contract:
JEM06014-Mansfield Supply2
Commodity Code
370 / MRO

HUSKYBUY UCONN

Returned Requisitions

Support
(860) 486-2BUY (2289)
HuskyBuySupport@UConn.edu

Overview This user guide will show you how to find the problem with a returned requisition, and how to resubmit the corrected requisition for approval.

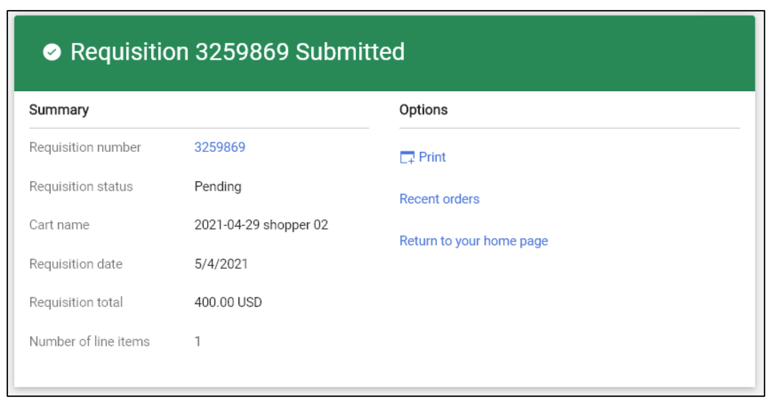
Related Job-Aids Related Job-Aids you may want to review.

- Setting Your Notification Preferences
- Requisition Quick-Tips Guide

Contents Included within this user-guide you will find:

- *Receiving a Returned Requisition*
- *Go to the Correct Requisition for editing*
- *Determine the reason for the return and Correct it*
- *Resubmit the Corrected Requisition*

Process Steps:

Step	Action	Screenshot
Receiving a Returned Requisition		
1	You have placed an order from your draft requisition in HuskyBuy, and receive a confirmation with the requisition number. Then, depending on your profile preferences, you will receive an email notification, get a notification in HuskyBuy - or both - stating that the requisition is being returned. You will only get a notification if you have notifications turned on in you profile preferences. See the *Related Job-Aids* above.	

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>2</td><td>

Here's a sample email notification.

Please note: Clicking on the **View Requisition** button in the email will take you to a read-only version of the requisition. You may **NOT** be able to resubmit the requisition from there.

However, clicking on the **View Requisition** button is a good way to get back into HuskyBuy if you are not already there.

Open the HuskyBuy application, or
Click the button to continue.

You may also see a reason why your requisition was returned at the bottom of your notification email.

</td><td>

HUSKYBUY UCONN

Re: Requisition Returned For Requisition #: 3197818

Cart Name: 2021-03-11 Camera Equipment

Prepared for: Jeremiah Macht

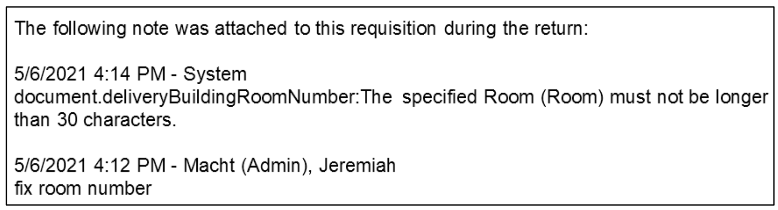
Prepared by: Jeremiah Macht

Returned by: Jeremiah Macht (Admin)

Dear Jeremiah Macht,

The requisition listed above has been returned by an approver. You can review a read only version of this requisition by selecting the URL below.

View Requisition



The following note was attached to this requisition during the return:

5/6/2021 4:14 PM - System
document.deliveryBuildingRoomNumber:The specified Room (Room) must not be longer than 30 characters.

5/6/2021 4:12 PM - Macht (Admin), Jeremiah
fix room number

</td></tr>
<tr><td>3</td><td>

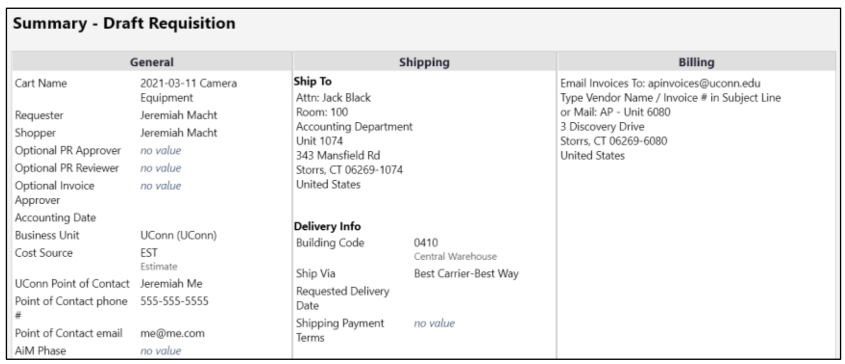
If you clicked the button in the email, you are taken to the requisition but, as you can see to the right, in the top example, there are no options to edit the requisition.

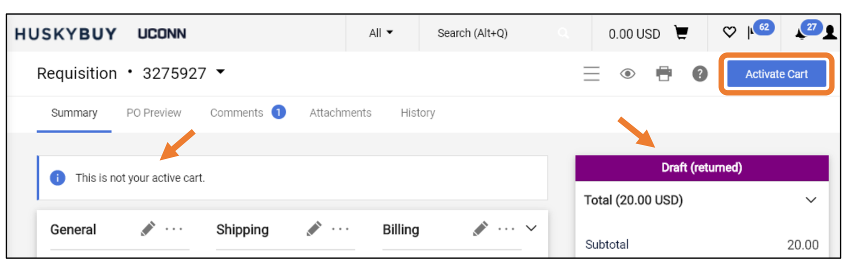
OR

You may be directed to a version of your requisition called "Draft (returned)". Notice the information note "This is not your active cart." In this case you can make changes, but you can't resubmit until you click the **Activate Cart** button.

Alternatively, you can open the returned requisition as shown in the next step below.

</td><td>





</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td colspan="3">Go to the Correct Requisition for editing</td></tr>
<tr><td>1</td><td>

Within HuskyBuy, you can get to the correct draft requisition in one of two ways.

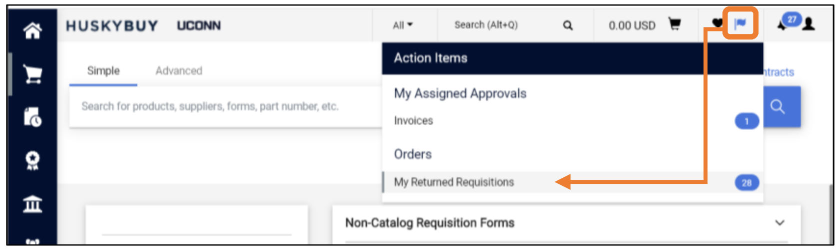
- Click on the *Action List* flag at the top of the screen and select **My Returned Requisitions**.

<OR>

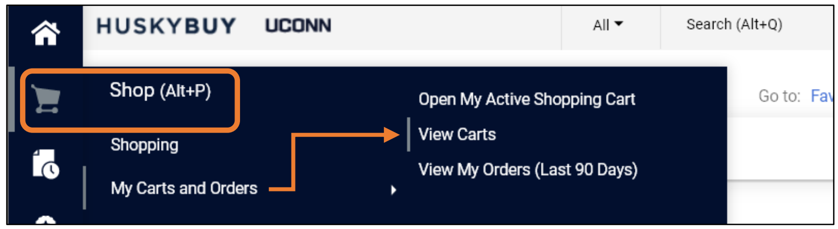
- From the left menu, select: **Shop > My Carts and Orders > View Carts**.

Either way will get you to the following **Cart Management** screen.

</td><td>



<OR>

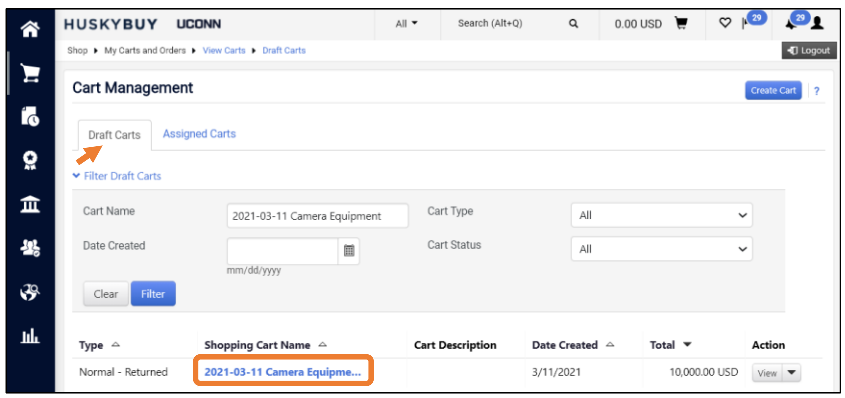


</td></tr>
<tr><td>2</td><td>

You should see your returned requisition in the Draft Carts tab.

Click on the Shopping Cart Name to go to the draft requisition. (**2021-03-11 Camera Equipment** in this example.)

</td><td>



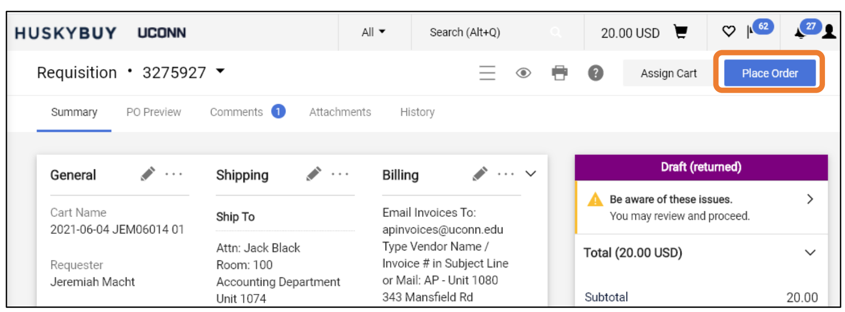
</td></tr>
<tr><td>3</td><td>

You will know you're in the right place for editing the requisition because you will see the **Place Order** button.

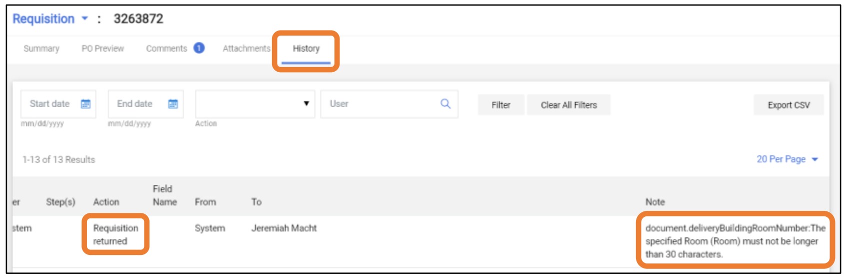
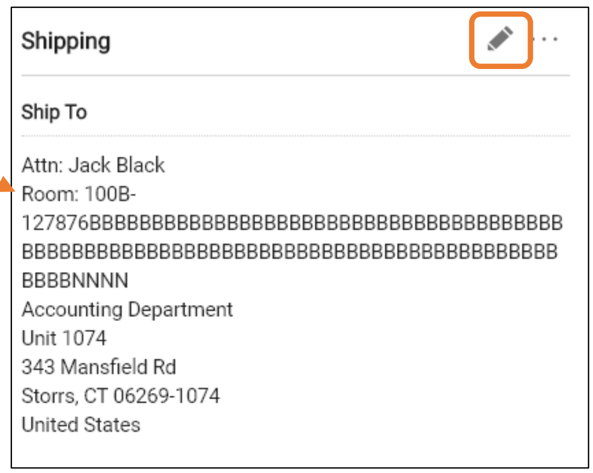
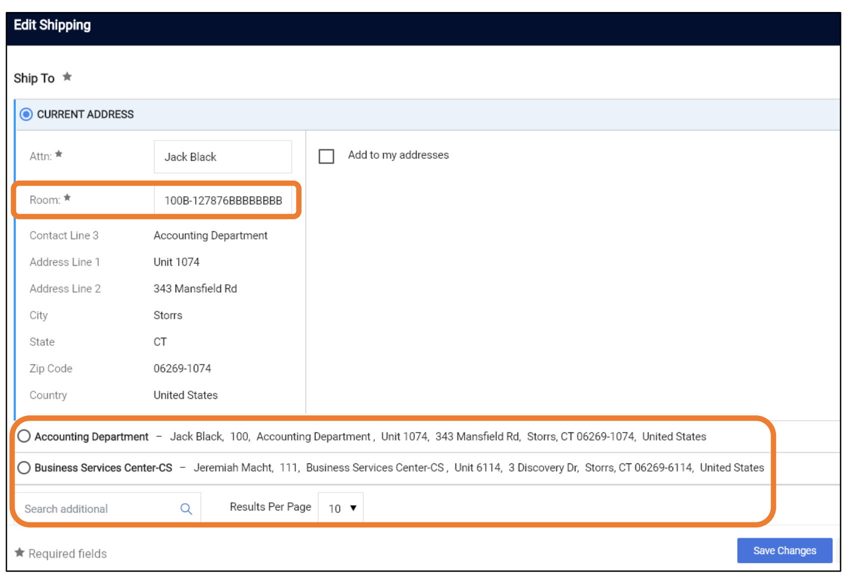
Now we will determine the reason the requisition was returned so we can correct it and resubmit it for the approval process.

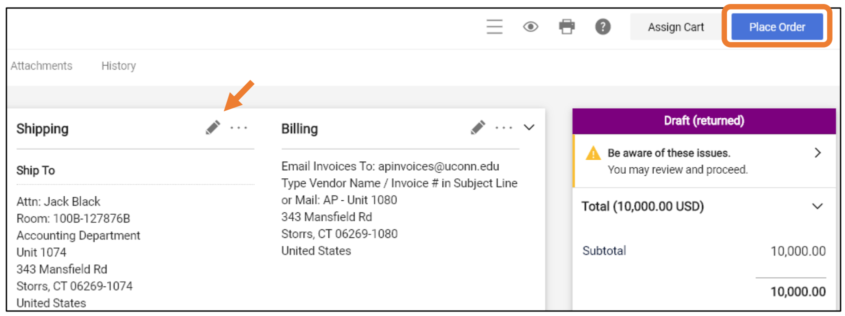
The reason for the returned requisition was first stated at the bottom of the email notification, but not everybody has that turned on. The same information can be found in the **History** tab.

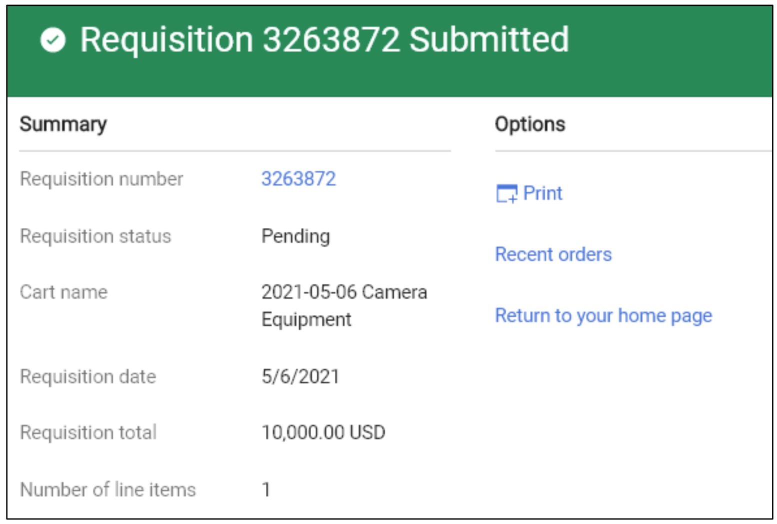
</td><td>



</td></tr>
</table>

Step	Action	Screenshot
Determine the reason for the return and Correct it		
1	Click on the **History** tab of the requisition and look for the **Note** on the **Requisition Returned** line. (It should be the top line.) The note should give you a good idea where to look to correct the problem. **For Example:** document.deliveryBuildingRoomNumber:The specified Room (Room) must not be longer than 30 characters. This tells us the Room number cannot be more than 30 characters. And it is the Delivery-Building-Room-Number. Go back to the **Summary** tab of the **Requisition** as shown in the picture above.	
2	If we look at the **Ship To** address in the **Shipping** area of the Summary screen, we see that the Room number does indeed have more than 8 characters. Click on the **Edit** button to get to the editing pop-up shown below.	
3	Edit the **Room** number to something that is 30 characters or fewer. You also have the option of changing your address from the list at the bottom. <OR> Selecting a completely different address by clicking in the **Search additional** search box. *We will remove the last few characters that were accidentally added when creating the address.* Click **Save** when done.	

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td colspan="3">Resubmit the Corrected Requisition</td></tr>
<tr><td>1</td><td>Back in the draft requisition, you can now click on the Place Order button to resubmit the original requisition.</td><td>
</td></tr>
<tr><td>2</td><td>The requisition is resubmitted with the same number as before.

If it’s not returned again, you are done. Nice job!</td><td>
</td></tr>
</table>

One final thing…

To help ensure that the same problem doesn’t happen again, you will need to determine how the error happened in the first place.

In this example, the **Ship To** address came from my default shipping address in my profile. I will need to change the Room number in my default shipping address to prevent this from happening again.

Refer to the Setting Your Notification Preferences Job-Aid if necessary.

There are many reasons why a requisition might be returned. This example was chosen because it has been a somewhat common problem. Mostly because entering more than 30 characters in your Default Shipping Address’s **Room** number will not produce an error at that time; not until you try to submit a requisition using that address.

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HUSKYBUY UCONN

Ethyl Alcohol Purchase

Support
(860) 486-2BUY (2289)
HuskyBuySupport@UConn.edu

Overview This user-guide will assist you with purchasing **Ethyl Alcohol.**

Related Job-Aids

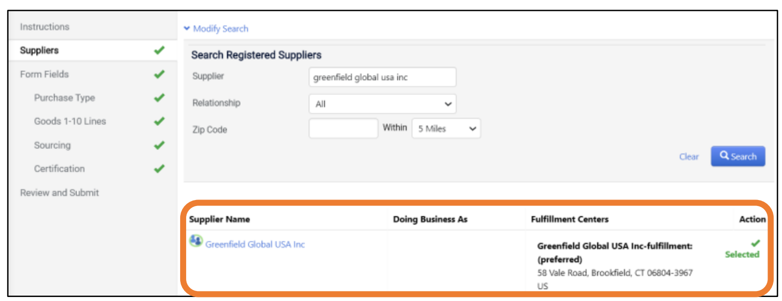
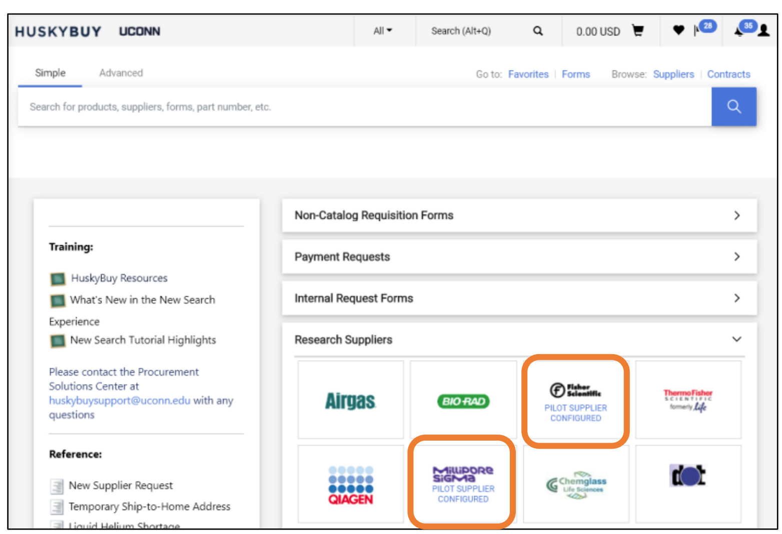
- Shipping for Chemicals
- Draft Requisitions

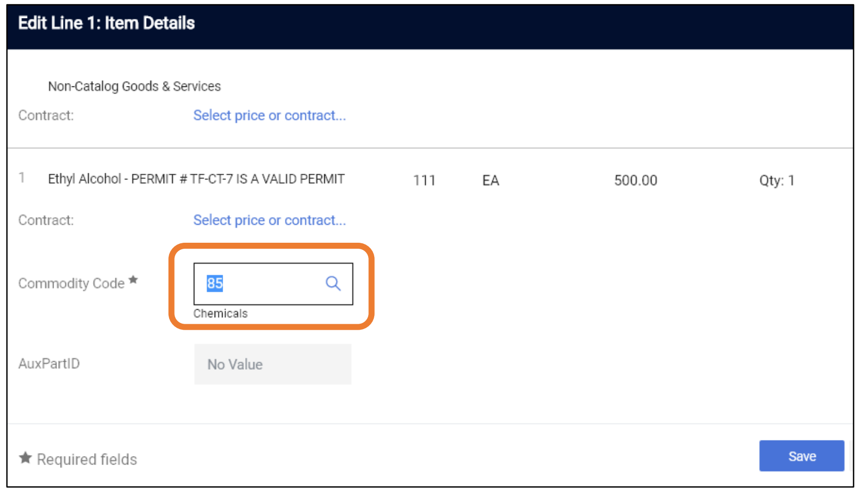
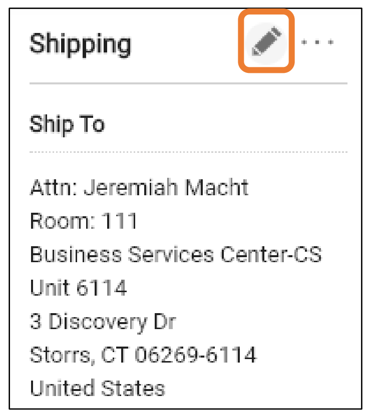
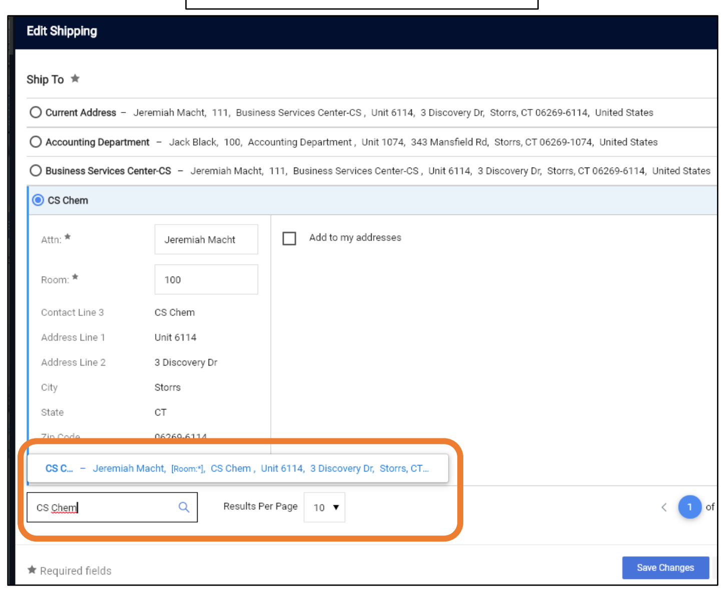
Please Note Orders are placed in HUSKYBUY, Central Warehouse no longer supplies.

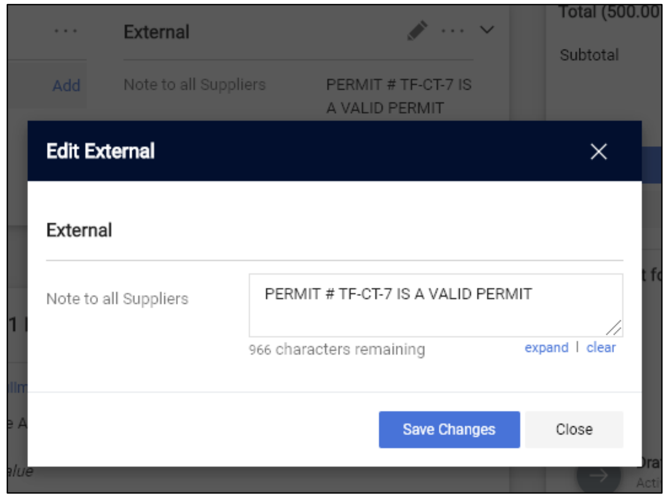
Contents Included within this user-guide you will find:

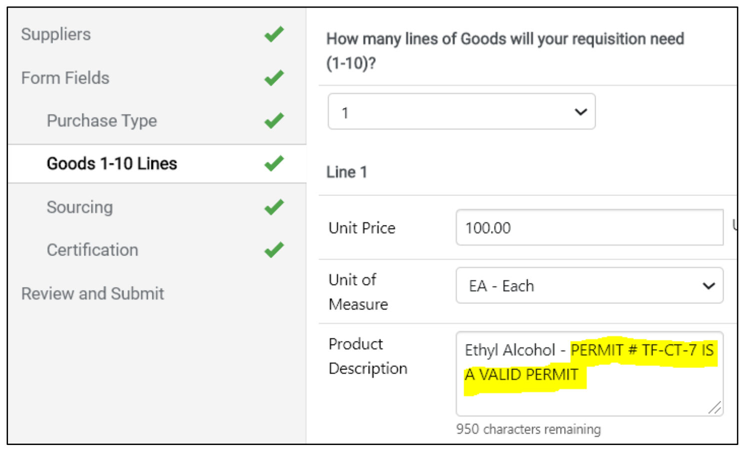
- *Choosing Appropriate Ethyl Alcohol Supplier*
- *Special Instructions for Ethyl Alcohol Purchasing*

Process Steps:

Step	Action	Screenshot
Choosing Appropriate Ethyl Alcohol Supplier		
1	**Greenfield Global** Contact info: www.pharmcoaaper.com, Phone: 1-800-456-1017, orders are submitted in HuskyBuy via the Non Catalog Goods & Services Form. **Fisher Scientific & Sigma** Please refer to HuskyBuy punchout for ordering.	 

Step	Action	Screenshot
Special Instructions for Ethyl Alcohol Purchasing		
1	Assign Commodity Code 85, Chemicals and click **Save**.	
2	For Storrs locations, use ***CS CHEM*** ship to address *unless the order is for the Chemistry Dept*. (see Chemical Orders Job Aid). Click the pencil edit icon. Search for CS Chem in the address lookup.	 

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>3</td><td>Order MUST include PERMIT # TF-CT-7 IS A VALID PERMIT keyed to the Notes to Supplier field or the Product Description Field following the product description detail. The vendor may not process your order without this statement clearly detailed on the PO</td><td>


</td></tr>
</table>

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Support
(860) 486-2BUY (2289)
HuskyBuySupport@UConn.edu

Copy a Requisition

Overview This guide will assist you with copying a requisition which will make it easier for you to complete a similar order.

Before You Begin You will need to search for and open one of your previous requisitions before you are able to copy.

Please note, ensure that the requisition you want to copy is a **Non-Catalog** order (ex. Goods & Services or Blanket Order), NOT a **Catalog** order (ex. Dell or Airgas punchout websites).

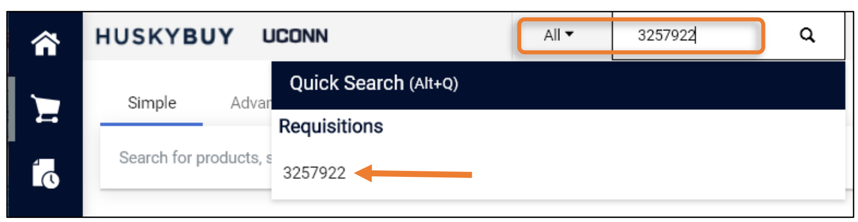
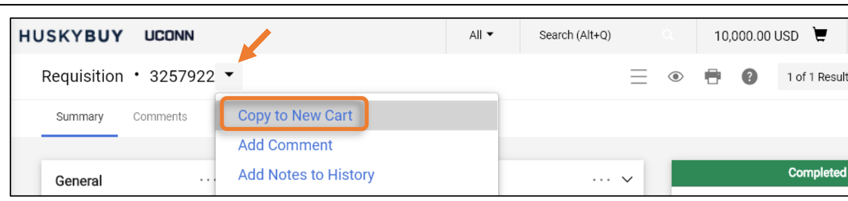
Related Job-Aids

- Document Searches
- Requisition Approval

Contents Included within this user-guide you will find:

- *Find and Copy Your Cart*
- *Submit or Assign Your Cart*

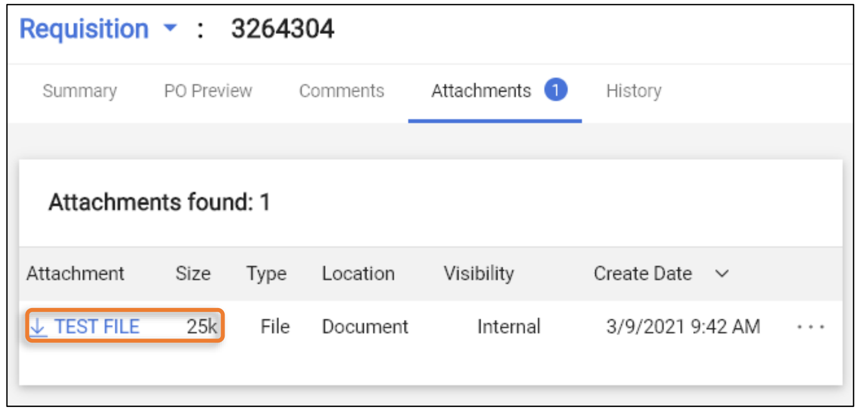
Process Steps:

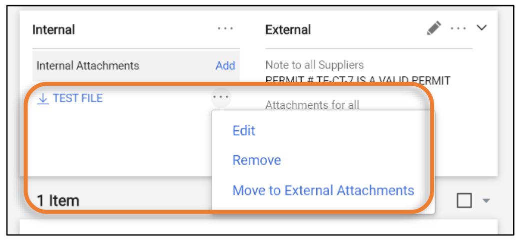
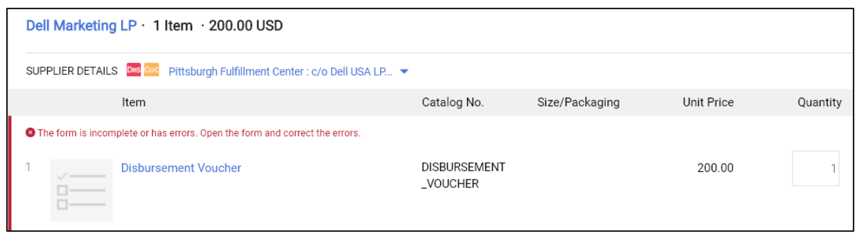
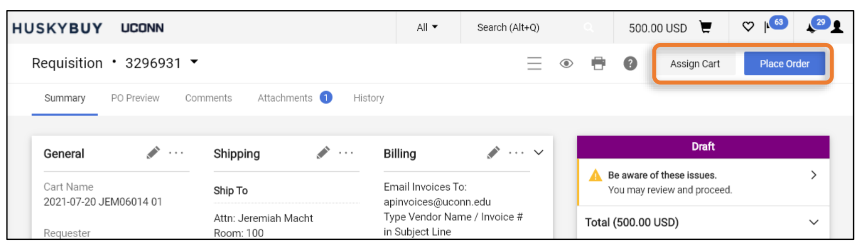
Step	Action	Screenshot
Find and Copy Your Cart		
1	Search for your requisition you wish to copy and click on the result displayed.	
2	When you open your previous requisition, you will see the **Document Dropdown Available Actions** menu. Click on **Copy to New Cart**. You will be taken to a new shopping cart where you can click **Proceed to Review** to continue.	 

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>3</td><td>Notice that your attachment from your previous form has come over to your new copied draft requisition. You will need to remove the old attachment by going to the Internal section. Click on the 3 dot menu (• • •) to display the option to remove. Next go to the form and upload a new attachment if needed.

Note: Forms will copy the attachment from the form to the requisition’s Attachment tab. Form Requests will only keep the original on the form request, and not add a copy to the attachment tab.

Forms: Blanket Order, DV, EHS Purchase

Form Requests: Goods & Services, Catering, Equipment, and Software & IT Service</td><td>


</td></tr>
<tr><td>4</td><td>When Copying a Disbursement Voucher, you will need to update the DV form with an updated supplier invoice number as it has to be a unique number.</td><td>
</td></tr>
<tr><td colspan="3">Submit or Assign Your Cart</td></tr>
<tr><td>1</td><td>Once your changes have been made, such as accounting codes, shipping or items, you can continue to either Place Order or Assign Cart.</td><td>
</td></tr>
</table>

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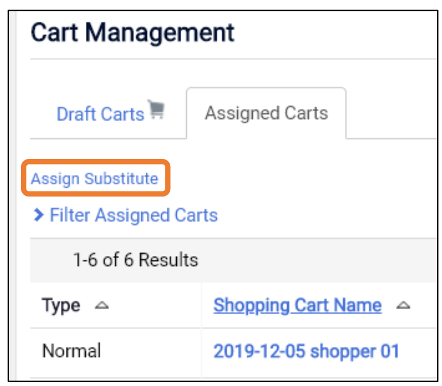
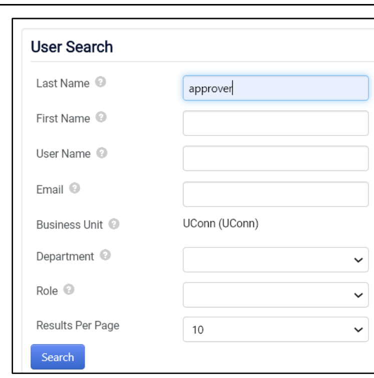
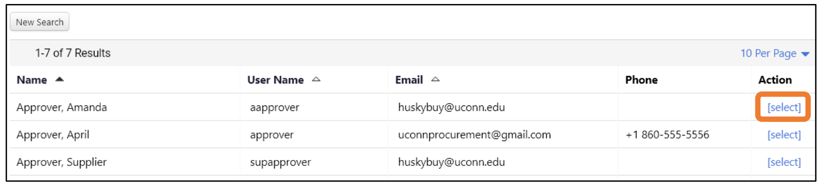
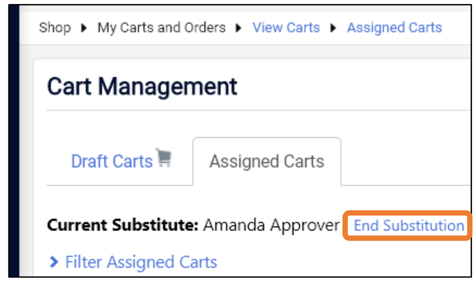
Assign Substitute Requisitioner

Overview	This user-guide will assist you with assigning a substitute Requisitioner when a Requisitioner is unable to tend to the carts/documents assigned to them, i.e. vacation, personal leave, etc., the Requisitioner may "Assign" a Substitute Requisitioner. The Substitute requisitioner will receive all future draft carts until the Requisitioner unassigns the Substitute.
Related Job-Aids	• Assigning / Unassigning Carts • Requisition Approval
Contents	Included within this user-guide you will find: • *Assign Substitute Requisitioner*

Step	Action	Screenshot
Assign Substitute Requisitioner		
1	Click on **Shop > My Carts and Orders > View Carts**	
2	On the Cart Management screen click on Assign Substitute	
3	Enter information into one or more of the fields shown below to locate the Requisitioner you wish to assign as your substitute → Click **Search**	

4	The substitute requisitioner's name will appear as shown. Click Select to choose your substitute.	
5	Click End Substitution to "Unassign" the substitute Requisitioner when ready.	

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Order & Shipping Instructions for Chemicals

Overview There are special rules and regulations for ordering chemicals. Use this Job-Aid to help you through the process.

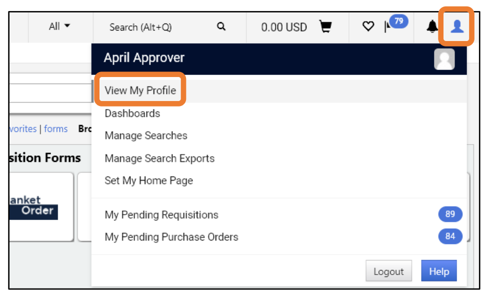
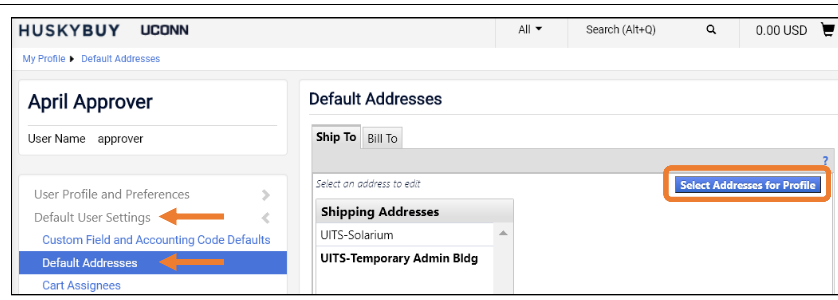
Related Job-Aids

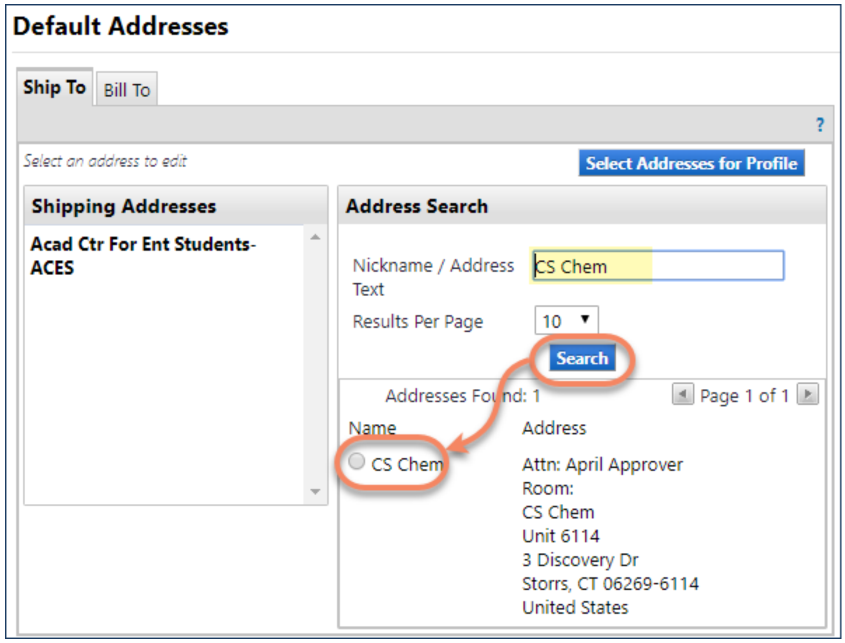
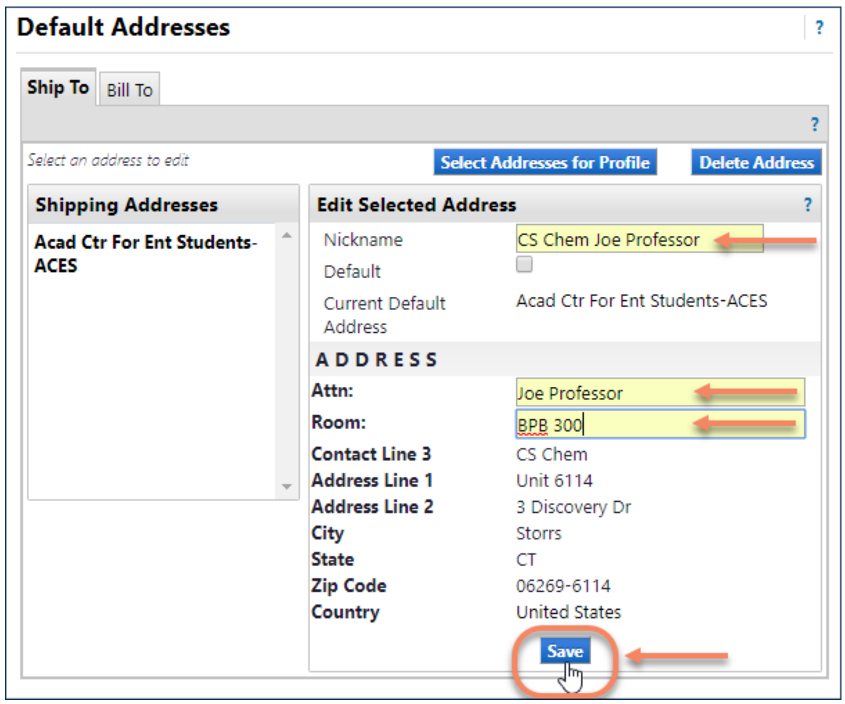
- Setting Your Profile Preferences
- Draft Requisitions

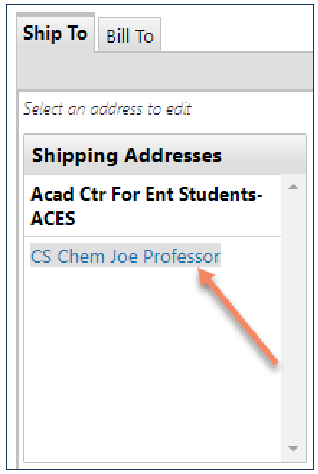
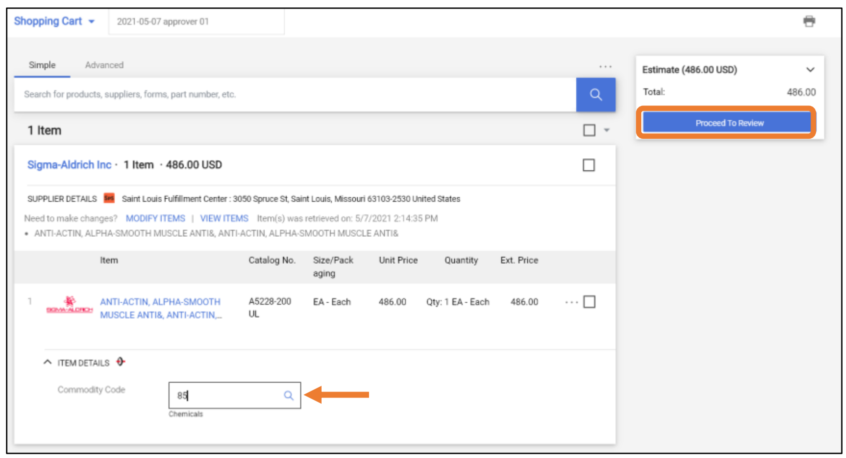
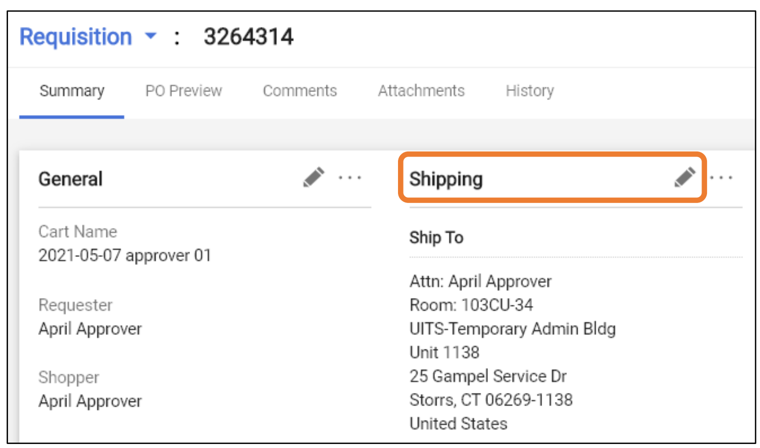
Contents Included within this user-guide you will find:

- *Set up the Chemical Shipping Address in Your Profile*
- *Placing Orders*

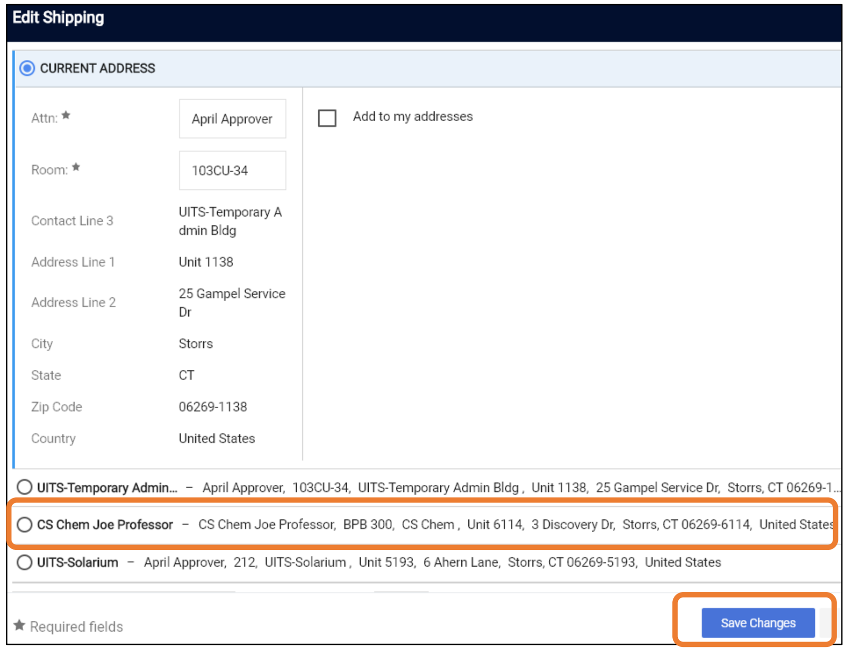
Process Steps:

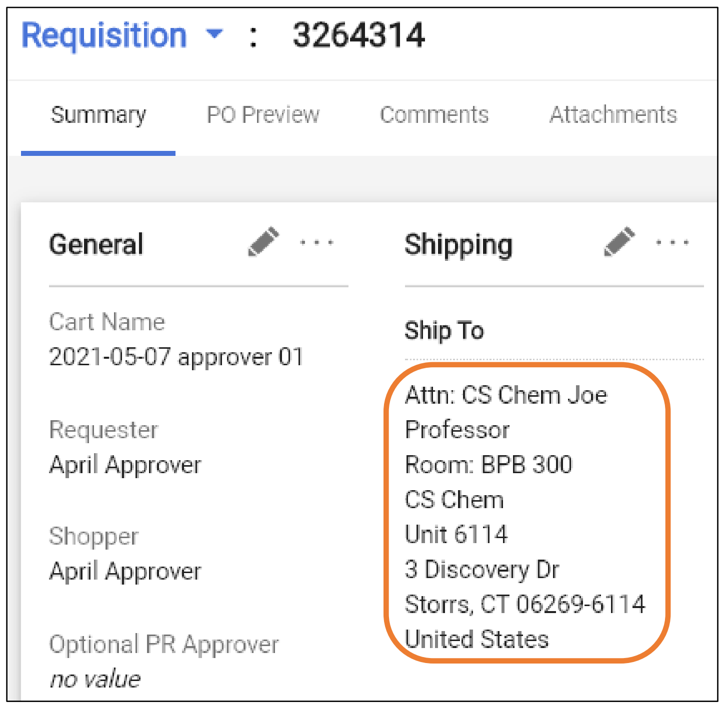
Step	Action	Screenshot
Set up the Chemical Shipping Address in Your Profile		
1	Click on your name in the upper right section of the page and select **View My Profile** In the pop-up menu.	
2	Go to, **Default User Settings** and select **Default Addresses**. (Here you can add your shipping addresses or review/edit an existing address.) Click on **Select Addresses for Profile** to search for a shipping address for chemicals.	

Step	Action	Screenshot
3	Enter: **CS Chem** for the search term and click **Search**. **Note:** Search terms are not case sensitive. Select **CS Chem** from the resulting search list and the information will populate as shown below.	
4	Create a nickname to easily identify the address. Enter the faculty member's name. Enter the building abbreviation and the room number where the chemical will be housed. **This field holds eight characters (including spaces).** **Note:** Additional instructions may be added to the requisition in the **External Notes** section. Click **Save**.	

Step	Action	Screenshot
5	The address now appears as a selection under your **Shipping Addresses** and is available for all future orders.	
Placing Orders		
1	In your shopping cart, always use Commodity Code **85** for chemicals. **Proceed to Review** the requisition.	
2	In the Draft Requisition, go to the **Summary** tab and click the **pencil edit** button to edit the **Ship To** address	

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>3</td><td>In the Edit Shipping popup box, select the CS Chem address we created above.

Click Save.</td><td>
</td></tr>
<tr><td>4</td><td>The Ship to Shipping address is now selected in the requisition.

See the Draft Requisitions Job-Aid for more information if needed.</td><td>
</td></tr>
</table>

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Ordering & Shipping Instructions for Airgas

Overview There are special rules and regulations for ordering Airgas. Use this Job-Aid to help you through the process.

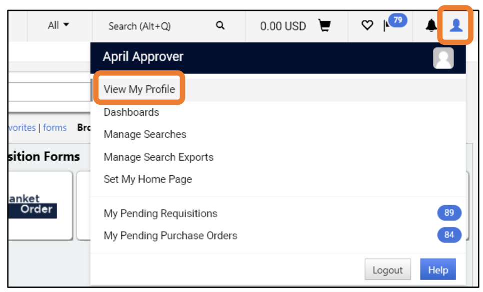
Related Job-Aids

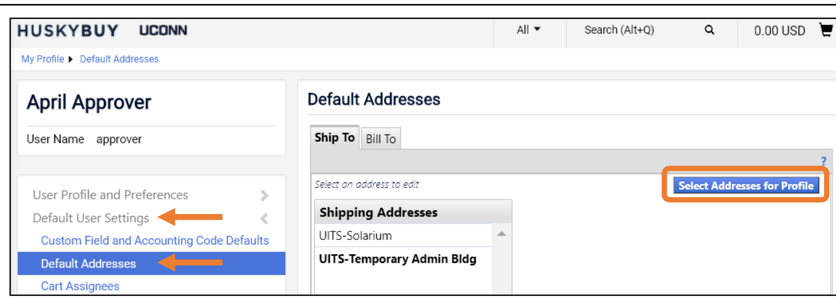
- Setting Your Profile Preferences
- Draft Requisitions

Contents Included within this user-guide you will find:

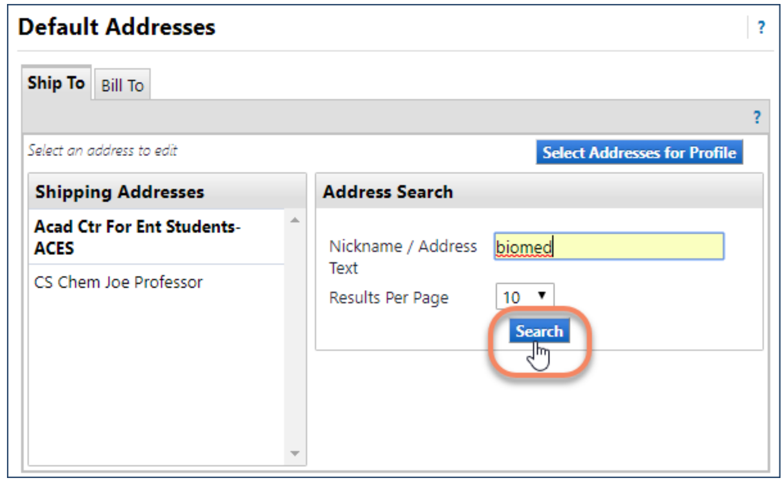
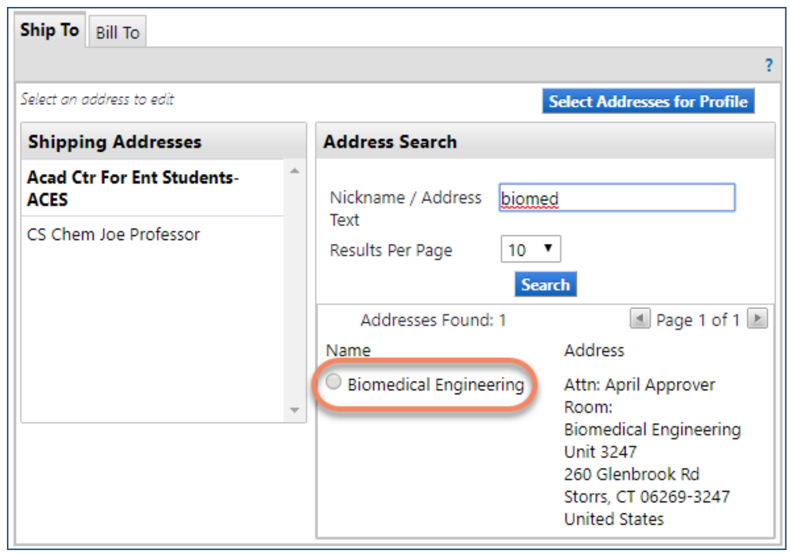
- *Set up the Airgas Shipping Address in Your Profile*
- *Placing Orders*

Process Steps:

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td colspan="3">Set up the Airgas Shipping Address in Your Profile</td></tr>
<tr><td>1</td><td>Click on your name in the upper right section of the page and select View My Profile In the pop-up menu.</td><td>
</td></tr>
<tr><td>2</td><td>Go to, Default User Settings and select Default Addresses. (Here you can add your shipping addresses or review/edit an existing address.)

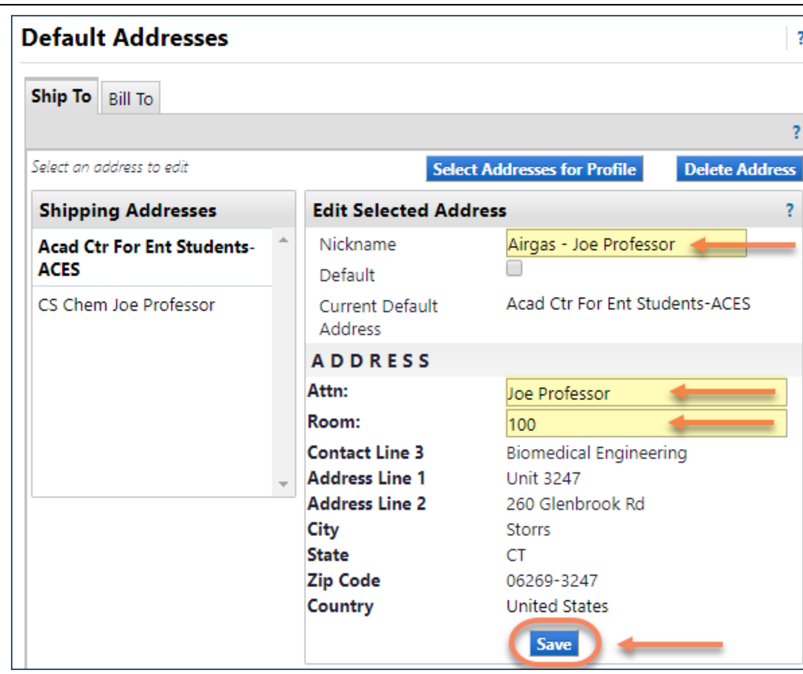
Click on Select Addresses for Profile to search for a shipping address for Airgas.</td><td>
</td></tr>
</table>

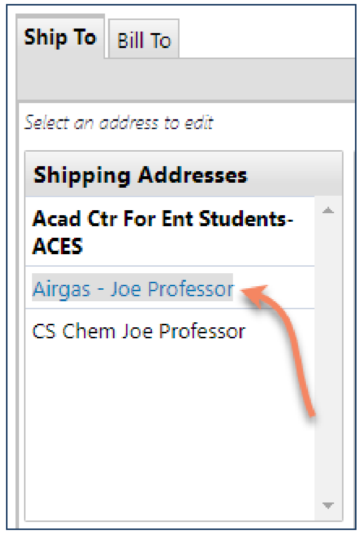
<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>3</td><td>Enter a search term for the Airgas Ship To address and click Search.

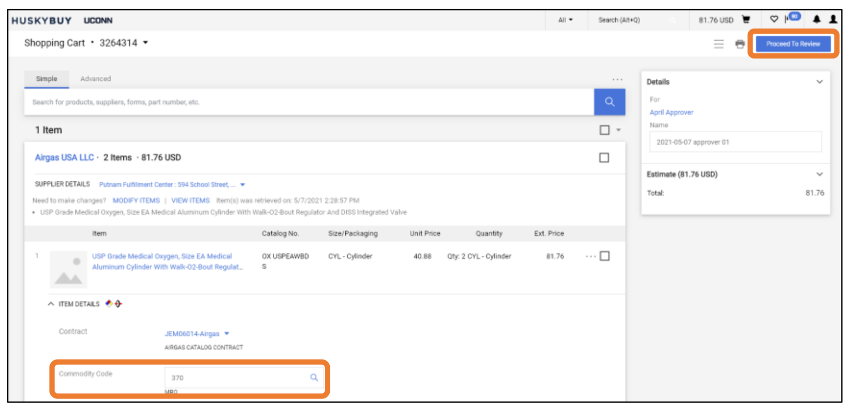
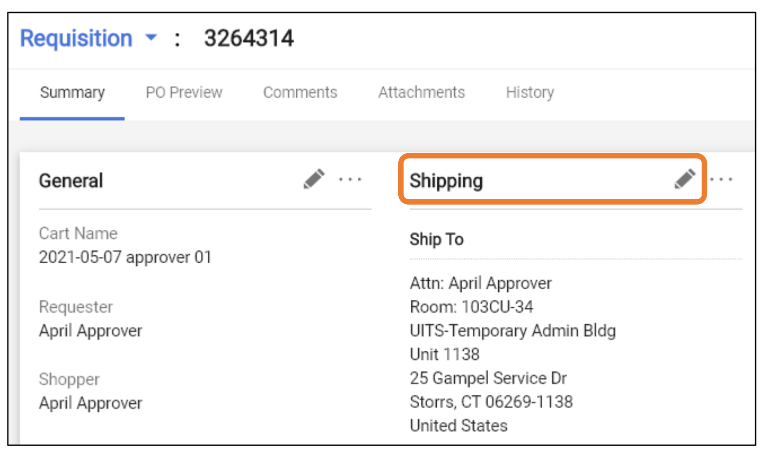
Note: Search terms are not case sensitive.</td><td>
</td></tr>
<tr><td>4</td><td>Select the correct address from the dropdown list and the information will populate as shown below.</td><td>
</td></tr>
<tr><td>5</td><td>Create a nickname to easily identify the address.

Enter the faculty member's name.

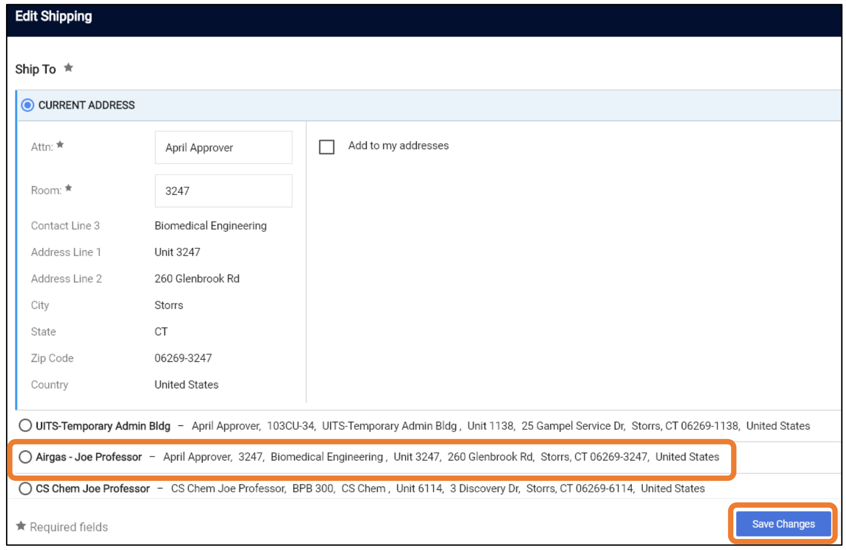
Enter the room number where the chemical will be housed.

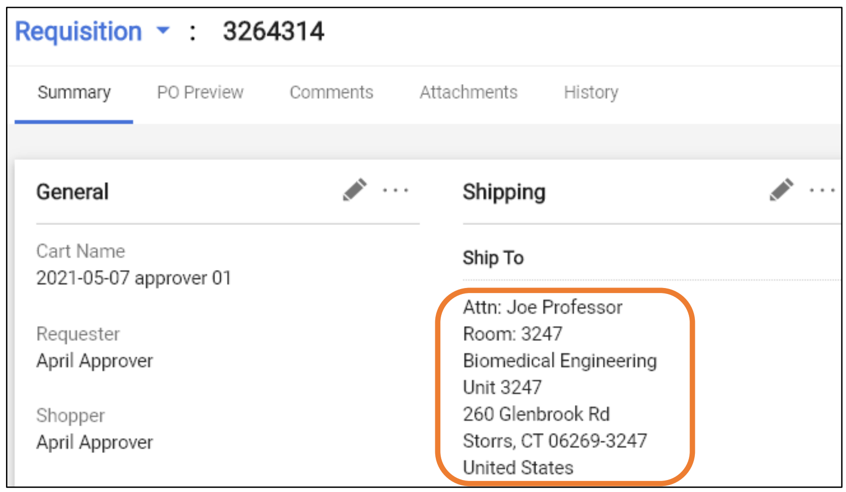
Click Save.</td><td>
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>6</td><td>The address now appears as a selection under your Shipping Addresses and is available for all future orders.</td><td>
</td></tr>
<tr><td colspan="3">Placing Orders</td></tr>
<tr><td>1</td><td>In your shopping cart, always use Commodity Code 105 for Airgas.

Proceed to Review the requisition.</td><td>
</td></tr>
<tr><td>2</td><td>In the Draft Requisition, go to the Summary tab and click the pencil edit button to edit the Ship To address</td><td>
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>3</td><td>In the Ship To popup box, select the Airgas address we created above.

Click Save.</td><td>
</td></tr>
<tr><td>4</td><td>The Ship to Shipping address is now selected in the requisition.

See the Draft Requisitions Job-Aid for more information if needed.</td><td>
</td></tr>
</table>

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Requisition Approval

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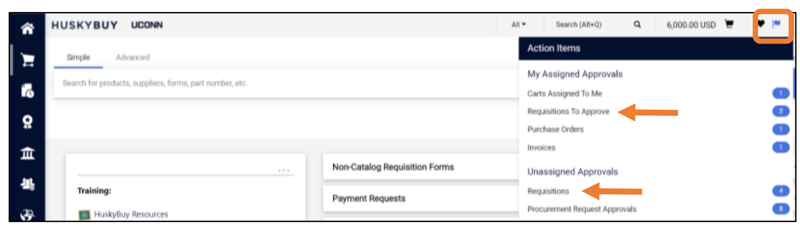
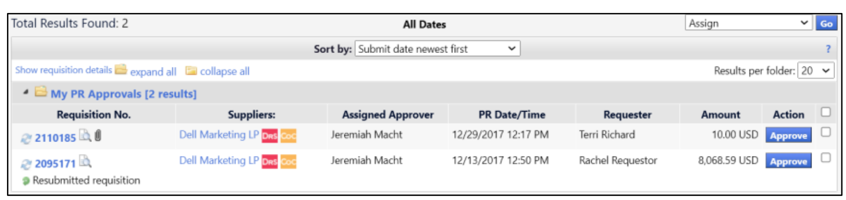
Overview When creating a requisition through HuskyBuy, you must be well versed on the practices and policies within procurement. (You can view those policies in the Buyer/Payer Guide.) Requisition approval is a required activity for all requisitions over the $5,000 threshold. Requisition approvers can only view, approve, return, and/or reject requisitions. They cannot edit fields.

Contents Included within this user-guide you will find:

Process Steps:

Step	Action	Screenshot
Accessing Requisitions Pending Review and Approval		
1	If someone is assigning requisitions to you, or you only want to see the ones you have assigned to yourself, click on the **Action Items** (flag) flag and select Requisitions to Approve under the **My Assigned Approvals** section. There are 2 in this example. **Note:** To see all of the shared requisitions waiting to be assigned to an Approver, click on Requisitions under the **Unassigned Approvals** section. The **My PR Approvals** folder will appear with all of the requisitions that have been assigned to you.	

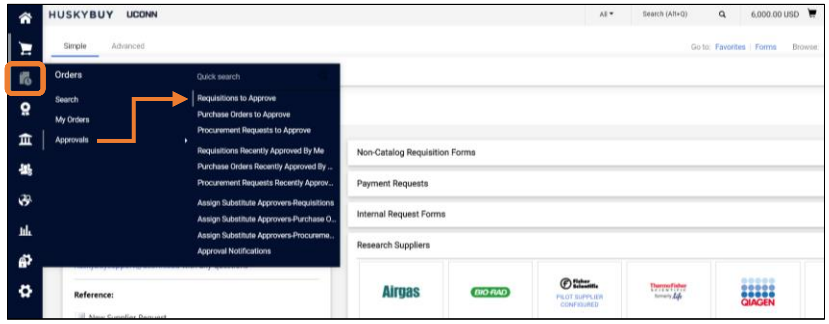
<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>2</td><td>

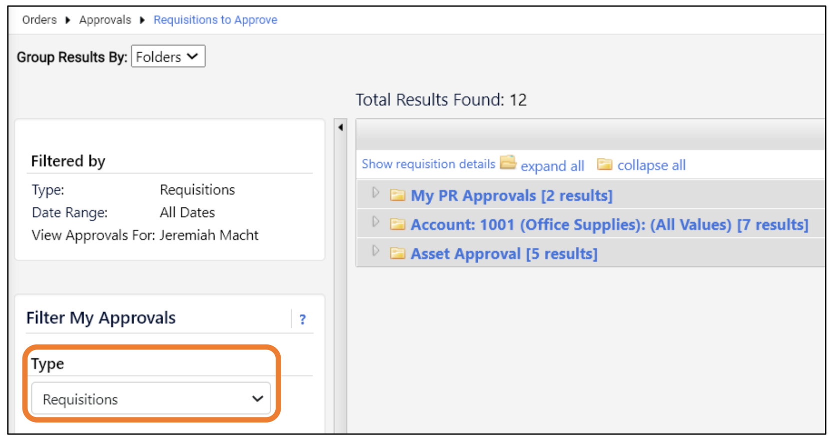
Another way to get to your requisitions is by using the icons on the left. Navigate to **Orders > Approvals > Requisitions to Approve**.

This method will show ALL of the documents that need to be approved. Click on the **Type** dropdown box under **Filter My Approvals** and select <u>Requisitions</u>.

Note: You can also use this method to see purchase order, invoices, or forms that need approval.

</td><td>



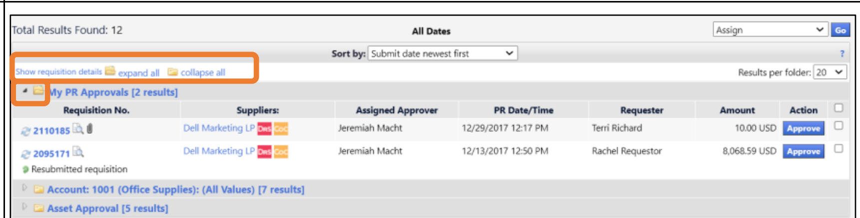


</td></tr>
<tr><td>3</td><td>

Click on the arrow  next to each folder to open it up.

Additionally, you can select **expand all** or **collapse all** at the top of the screen to control all of the folders at once.

</td><td>



</td></tr>
<tr><td colspan="3">

Filter Requisition Approvals

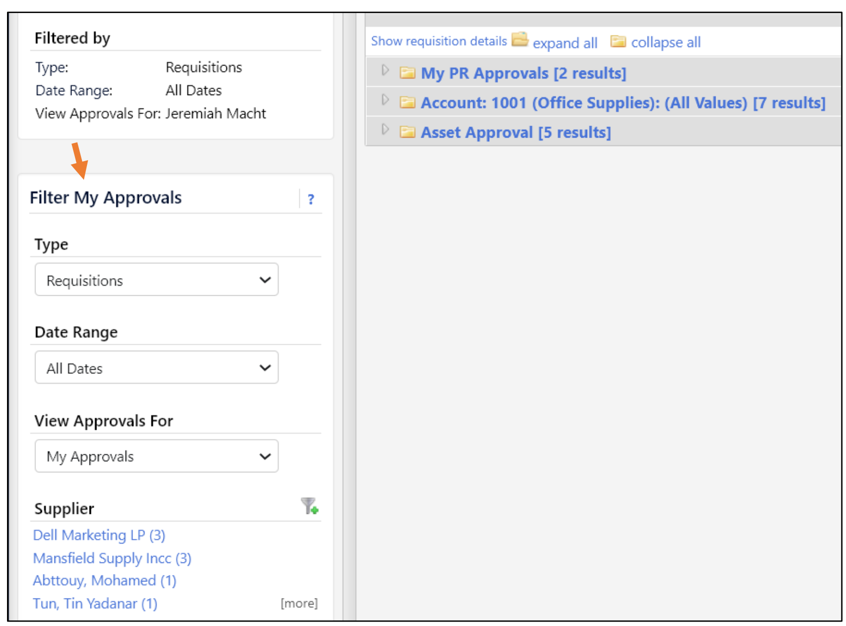
</td></tr>
<tr><td>1</td><td>

Additional filter options are also available in the left Filter bar and can filter by:

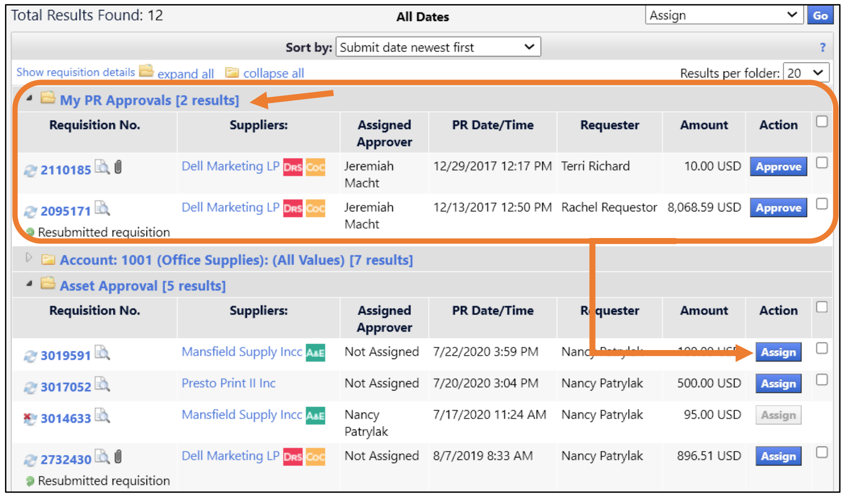
- Type
- Date Range
- Supplier
- Supplier Class
- Department
- Current Workflow Step
- Status Flags
- Assigned Approver

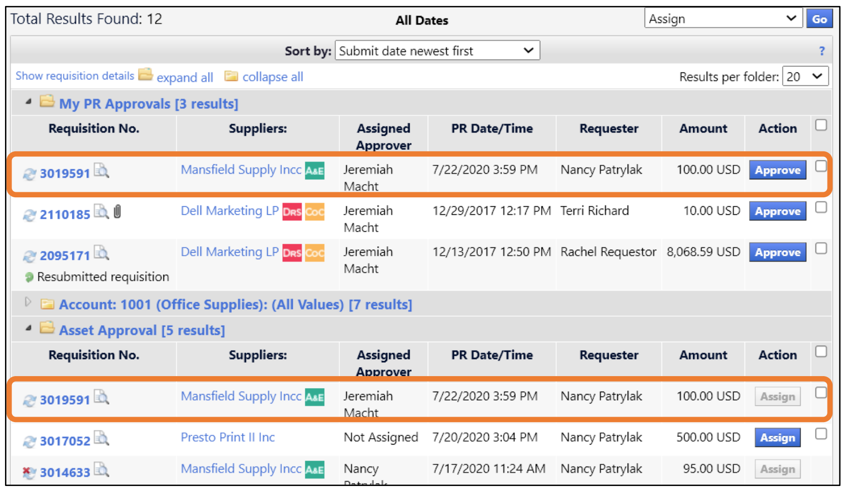
And many more.

</td><td>



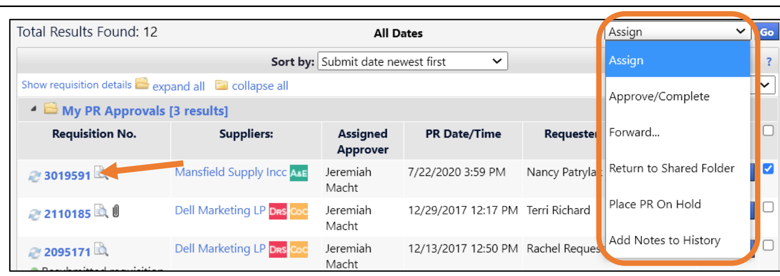
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td colspan="3">Assigning Requisitions to Myself</td></tr>
<tr><td>1</td><td>
The folders on the right side contain all of the requisitions that need to be approved. They are shared with all of the approvers and delegates.
The top folder, My PR Approvals, contains the requisitions that belong to you. Clicking on the Assign button assigns the requisition to your folder for approval.
Notice that after assigning the shared requisition to yourself, the Assign button is greyed out so no one else can take it, unless you return it to the shared folder.
You have just added the shared requisition to your My PR Approvals folder.
</td><td>


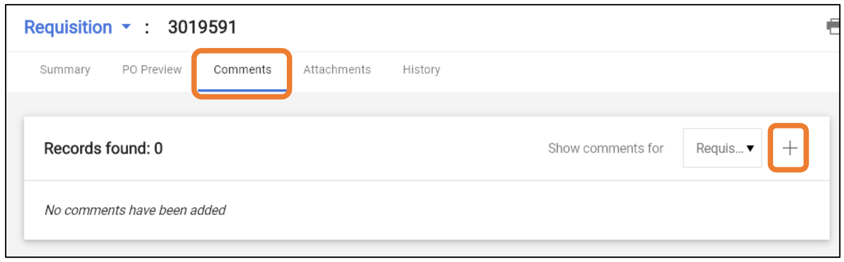


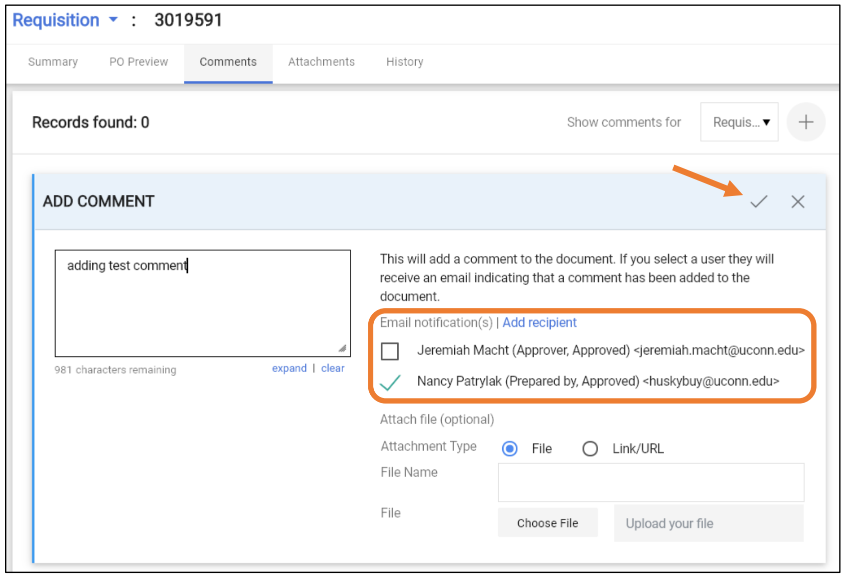
</td></tr>
<tr><td>2</td><td>
From the My PR Approvals folder, you also have the following options on selected requisitions. You can…

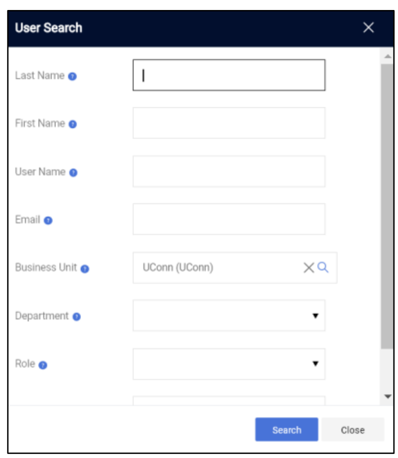
Forward…
Return to Shared Folder
Place on Hold
Add Notes to History

When you are ready to look at a requisition, select the requisition number.
</td><td>


</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td colspan="3">Adding Comments and Attachments</td></tr>
<tr><td>1</td><td>
In the requisition, navigate to the Comments tab.
Select the plus icon
Enter comment. Select individuals to receive the comment via email.
If the individual, you wish to select is not listed select Add recipient.
Within the User Search window, search for the recipient.
Once you've added a comment and selected email recipient(s) click the check mark in the top right of the Add Comment window.
Comments can also be added, by using the Document Available Actions drop-down menu.
</td><td>






</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>2</td><td>
From the Add Comment window, you can also Add an attachment.

Select Choose File within the Attach File section. Browse and select the file.

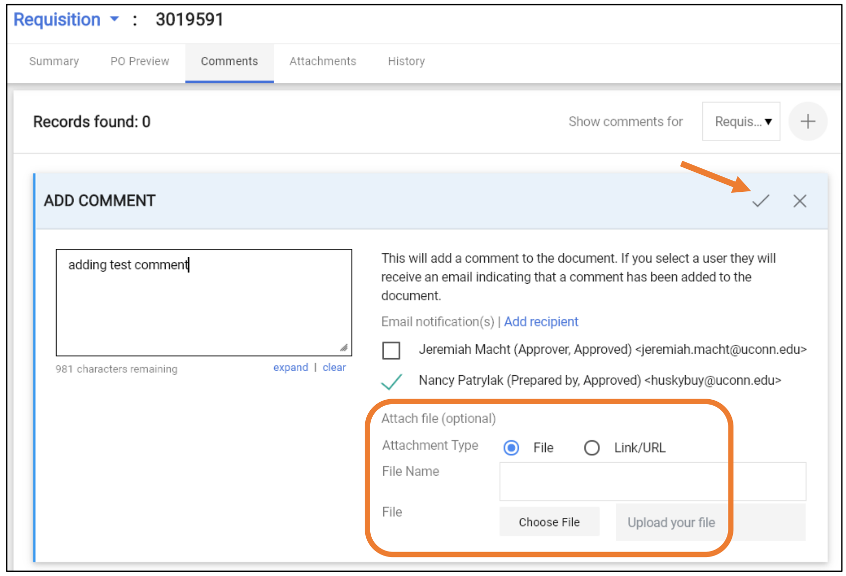
Then, select the check mark in the top right of the Add Comment window.

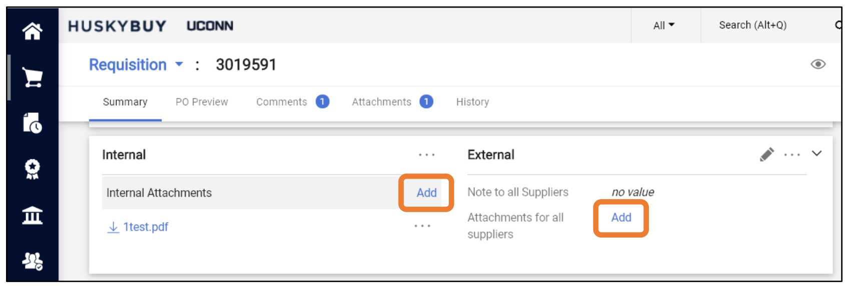
In addition, you can attach a file by navigating within the Requisition Summary tab and scrolling down to find the Add Attachment buttons.

You can add attachments in two places:

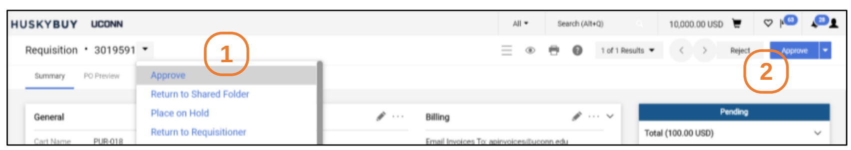
Internal: For comments and attachments that you do NOT want to go to the supplier.

External: For comments and attachments that are also available to suppliers.

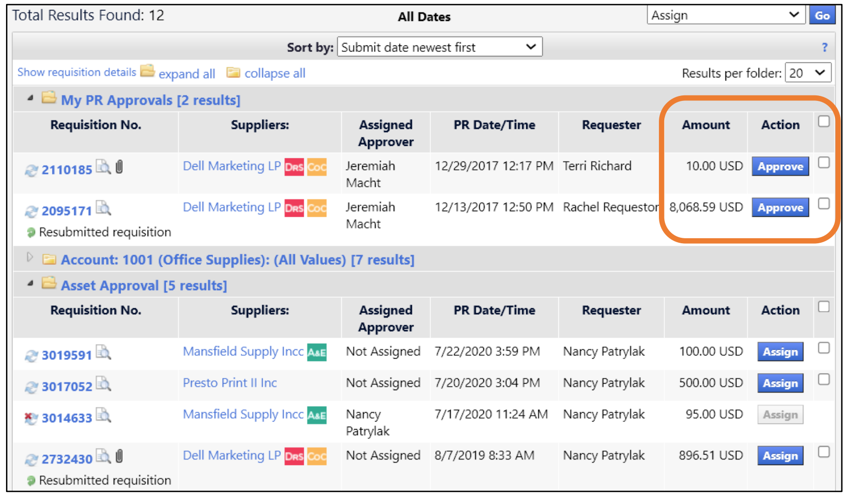
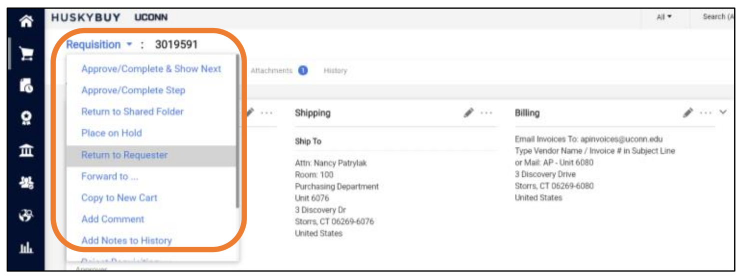
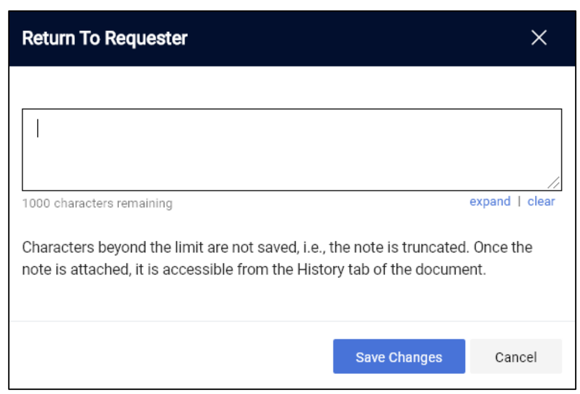
Note: Attachments cannot be added to documents once they have completed the approval workflow.
</td><td>




</td></tr>
<tr><td colspan="3">Approving a Requisition</td></tr>
<tr><td>1</td><td>
Review the requisition to ensure transaction is ok to approve.

Here you have two options to approve
1. Navigate to Document Available Actions drop down menu.
2. Navigate to the upper right corner and select from the Approve or Reject button.
</td><td>


</td></tr>
</table>

Step	Action	Screenshot
2	In addition, you can approve a requisition, by clicking the **Approve** button within the list of Approvals from your My Approvals.	
Returning a Requisition		
1	In the requisition, navigate to the **Document Available Actions** drop-down menu. From Available Actions, select **Return to Requester**. You will be prompted to enter a **Reason for return**. Click **Save Changes**.	 

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HuskyBuySupport@UConn.edu

Purchase Order Amendments (POAs)

Overview

Purchase Order Amendments can be made by anyone in the Requestor and/or Approver roles. The POA will route through the same approval workflow as a requisition.

Changing the price or the quantity of a line item (or adding a line item) on a non-catalog PO requires going back to the original non-catalog form that created the requisition for the PO. This is explained in the 3rd and 4th sections here: *Making Line Item Changes to a PO from a Non-Catalog Form.*

Older Purchase Orders that were NOT created in HuskyBuy were converted into HuskyBuy before going live in 2018. Changing the price or the quantity of a line item on these older, non-catalog POs is still possible, but it works a little different. See the fifth section for these cases: Making Line Item Changes to an Older PO that was Converted.

Please note that line items cannot be added to these older, converted Purchase Orders.
Also, Price or quantity changes cannot be made to Purchase Orders from a hosted catalog or a Disbursement Voucher.
Also, DO NOT change quantity to zero as this will create an error during workflow.

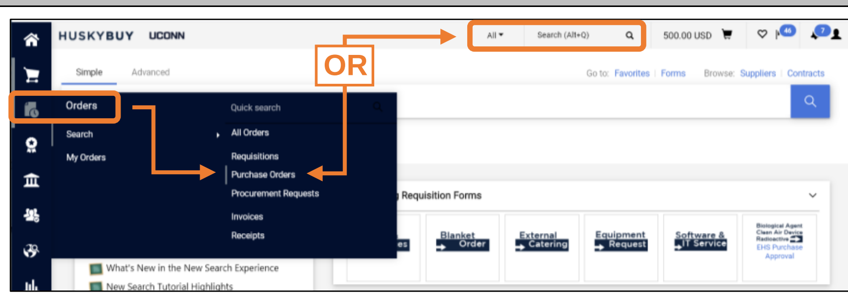
Related Job-Aids

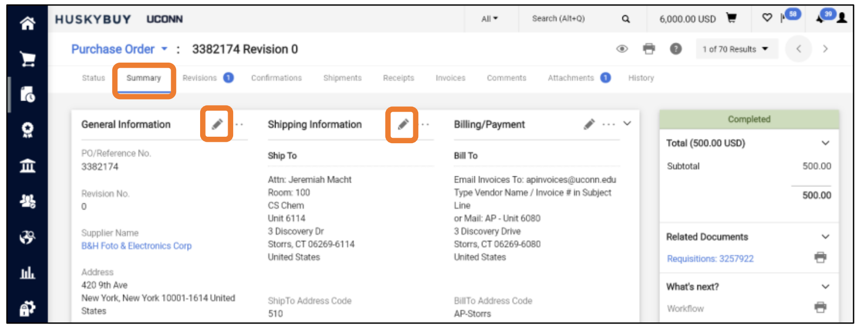
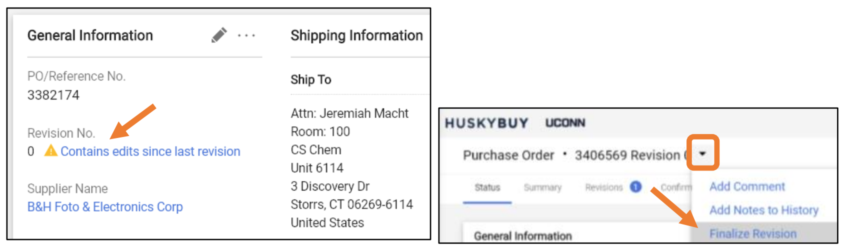
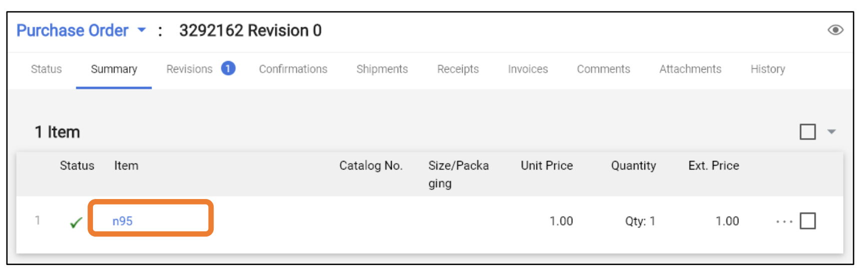
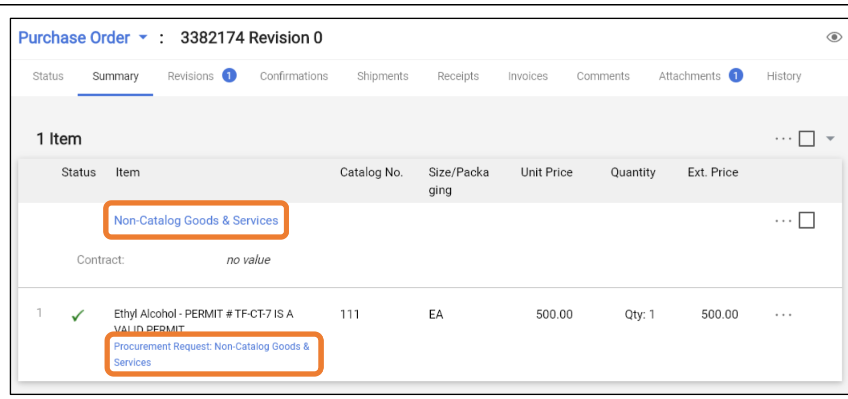
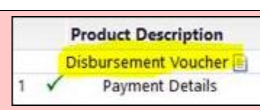
- Draft Requisitions
- Requisition Approval

Contents

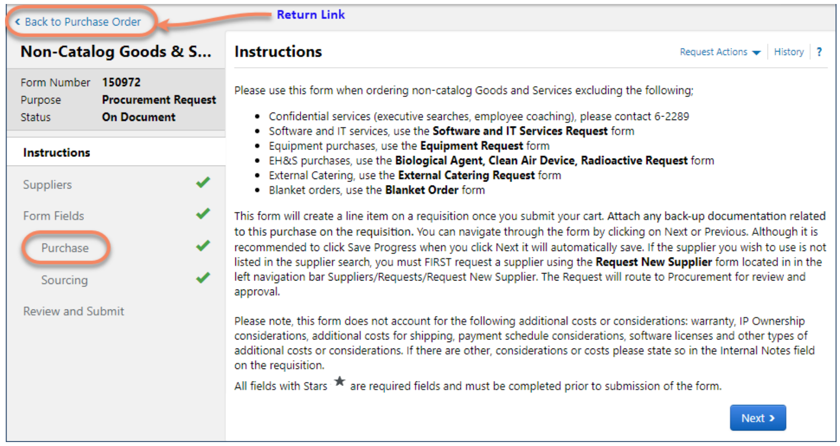
Included within this user-guide you will find:

Process Steps:

Step	Action	Screenshot
Find and Open the Purchase Order		
1	The POA will follow the same approval workflow as a requisition. Search for the PO you need to change either by the Document Search or type in the PO number in the Search field.	

Step	Action	Screenshot
Making Local Changes to the PO		
Making local changes includes things that are found in the **Summary** or **Accounting Codes** tabs of the Purchase Order. These can all be changed by clicking on the local **Edit** buttons as shown below. Changing the quantity or price of items on the Line Item of the PO requires going back to the Non-Catalog Form, which is described in the next two sections. Also, **DO NOT change quantity to zero as this will create an error during workflow.**		
1	Once you are in the PO, select the Summary tab. You can edit any field where the pencil edit button exists. In each section that you open to edit, be sure to click the **Save** button before continuing.	
2	After making changes, you will see that the PO Revision No. has a warning flag stating that there have been edits made since the last revision. If you are only making General edits, and you are done, go to the Finalize the Revisions section to finish.	
Making Line Item Changes to a PO from a Non-Catalog Goods & Services Form		
1	Scroll down to the Line Item Details at the bottom of the PO. If the PO is from a **Blanket Order** form, as shown in this example, you will only see the product description. We will describe changing this form later.	
2	Scroll down to the Line Item Details at the bottom of the PO. If the PO is from a **Non-Catalog Goods & Services** form, as shown in this example, it will be clearly indicated as shown here. In the Line Item Details section, click on the **Non-Catalog Goods & Services** link.	
Remember: If the Product Description is a catalog, or a Disbursement Voucher, making a change to the PO is NOT allowed.		

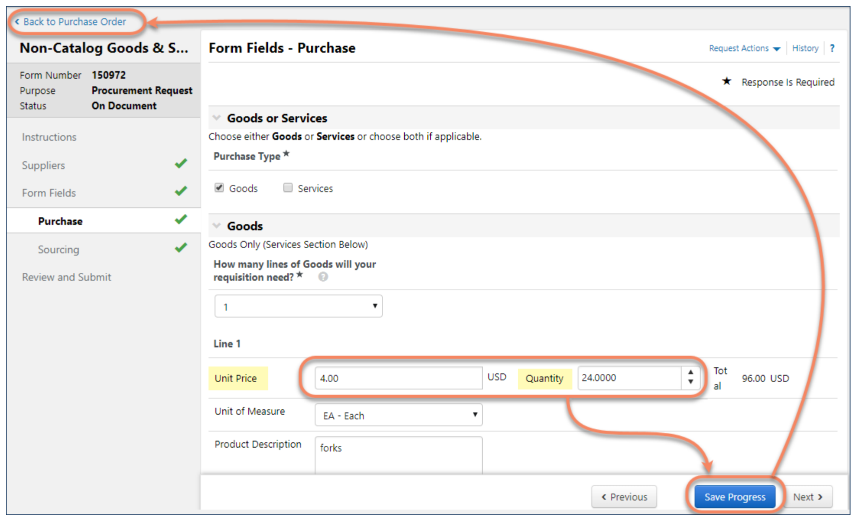
<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>3</td><td>Back in the Form, click on the Purchase link.

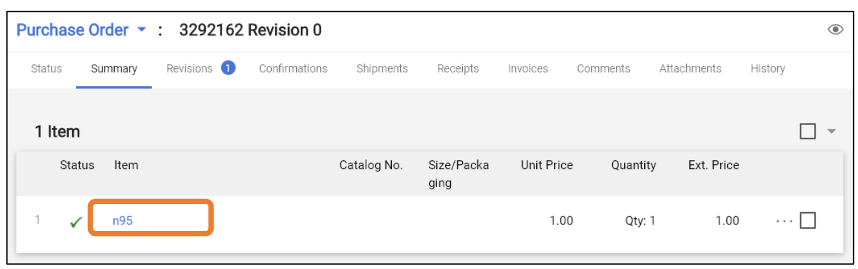
Notice the < Back to Purchase Order link in the upper left corner. This is how you will return to your cart after making changes.</td><td>
</td></tr>
<tr><td>4</td><td>Change the Unit Price or the Quantity in the appropriate field.

When done, click on the Save Progress button to save your changes.

Then click on the < Back to Purchase Order link in the upper left corner to return to the PO with your new changes.

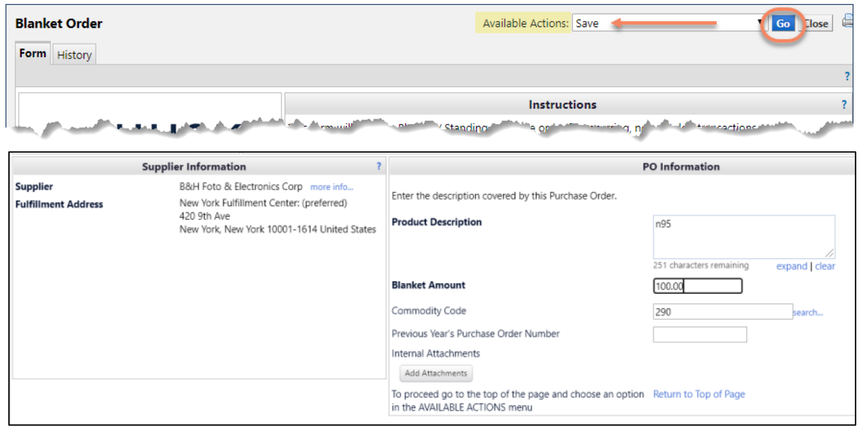
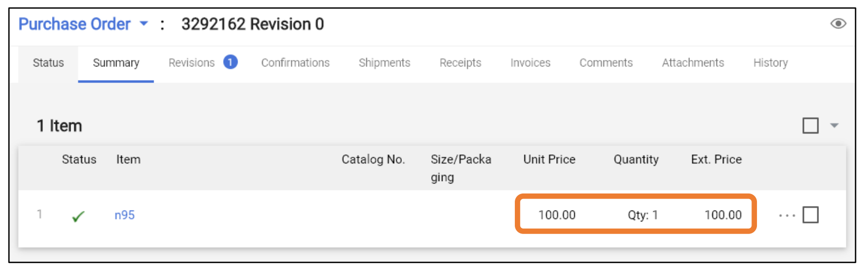
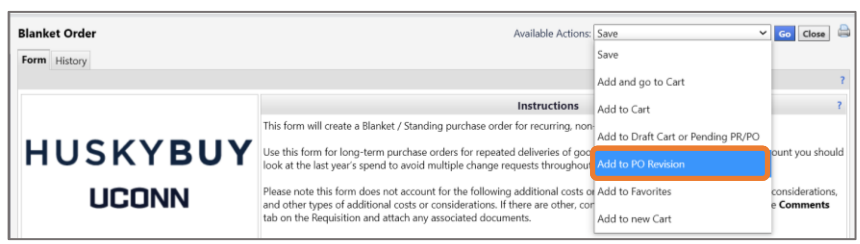
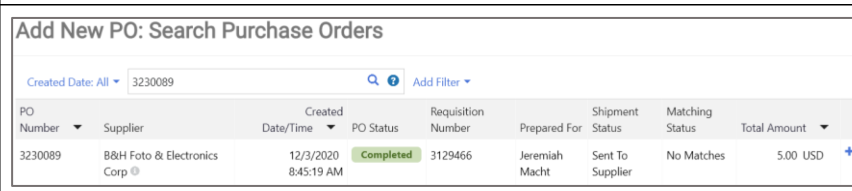
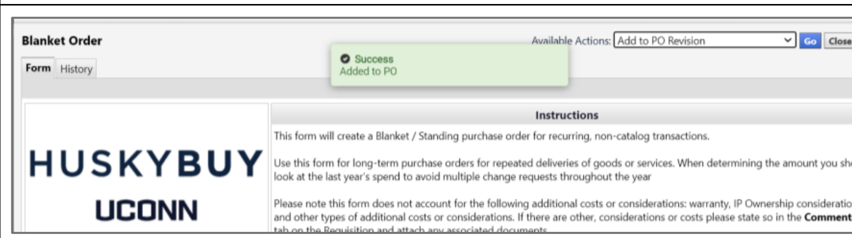
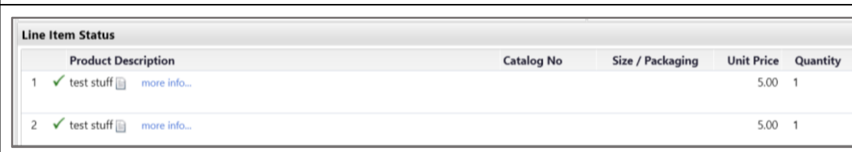
Note: Do NOT use the Next or Submit buttons when editing the Goods & Services Form. Always use the < Back to Purchase Order link in the upper left corner to return to the PO. Also, DO NOT change quantity to zero as this will create an error during workflow.

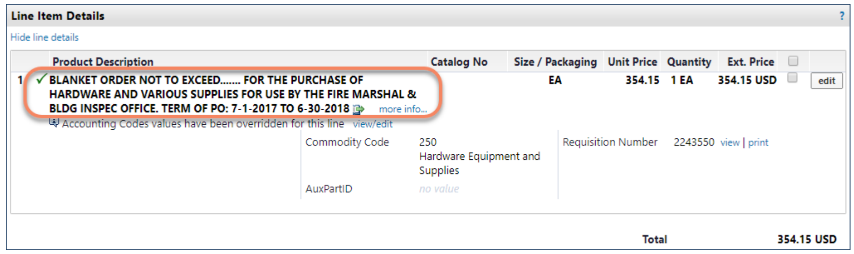
Go to the Finalize the Revisions section to finish.</td><td>
</td></tr>
<tr><td colspan="3">Making Line Item Changes to a PO from a Non-Catalog Blanket Order Form</td></tr>
<tr><td>1</td><td>Scroll down to the Line Item Details at the bottom of the PO.

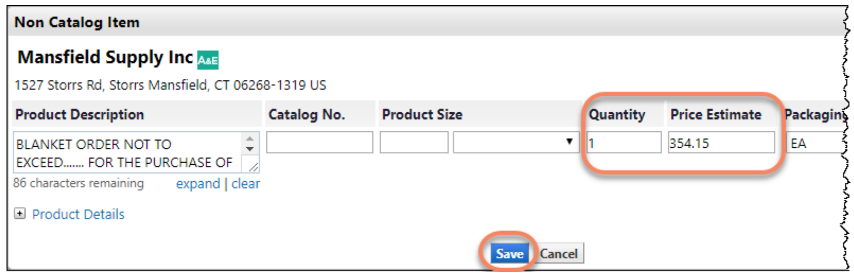
If the PO is from a Blanket Order form, as shown in this example, you will only see the product description. Click on the Product Description or the link.</td><td>
</td></tr>
</table>

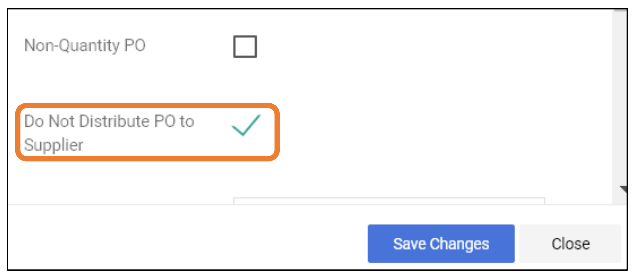
<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>2</td><td>The Blanket Order window will open up.

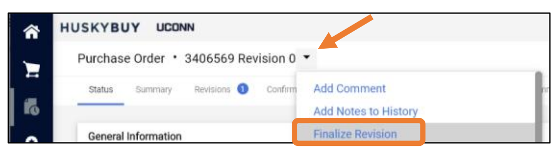
Make the desired changes to the Blanket Order form. You can change the
Product Description
Blanket Amount, or
The Commodity Code.
When done, ensure that the “Available Actions” setting is set to Save and click GO.

Close the Blanket Order window.</td><td>
</td></tr>
<tr><td>3</td><td>Back in the PO, confirm that the changes are displayed correctly in the Line Item Details section.</td><td>
</td></tr>
<tr><td colspan="3">Adding a Line Item to a PO from a Non-Catalog Blanket Order Form</td></tr>
<tr><td>1</td><td>Complete steps 1 and 2 from the previous section except do not save and close the Blanket Order window. Instead, under the “Available Actions” menu, choose Add to PO Revision and click GO.</td><td>
</td></tr>
<tr><td>2</td><td>Type the PO you would like to revise in the search box that appears. Then click the + symbol to the right to add the new line.</td><td>
</td></tr>
<tr><td>3</td><td>You will be directed back to the Blanket Order form. Notice the green success message. Now you can close the window.</td><td>
</td></tr>
<tr><td>4</td><td>Back in the PO, confirm that the changes are displayed correctly in the Line Item Status section.</td><td>
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td colspan="3">Making Line Item Changes to an Older PO that was Converted</td></tr>
<tr><td>1</td><td>Scroll down to the Line Item Details at the bottom of the PO and click on the Product Description or the more info… link.</td><td>
</td></tr>
<tr><td>2</td><td>Change the price or the quantity in the popup box that appears and click Save when done.

Note: You cannot add a new line item to a converted PO.</td><td>
</td></tr>
<tr><td colspan="3">Finalize the Revisions</td></tr>
<tr><td colspan="3">Please Note: By default, all revised POs will be distributed to the supplier on the PO.</td></tr>
<tr><td>1</td><td>If you do NOT want the revised PO to be dispatched to the supplier, be sure to check the Do Not Distribute PO to Supplier box in the General section of the PO before finalizing.

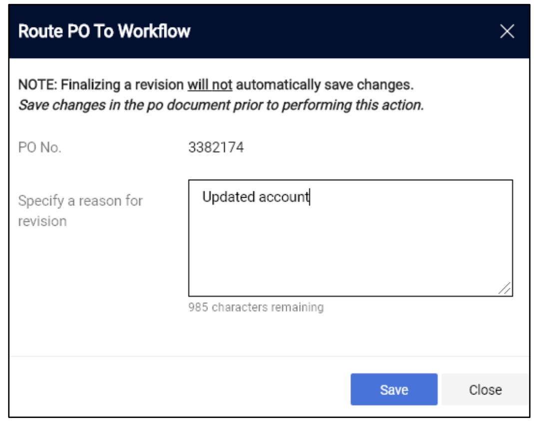
Then, click Save Changes.</td><td>
</td></tr>
<tr><td>2</td><td>Verify that the changes are reflected correctly in the PO.

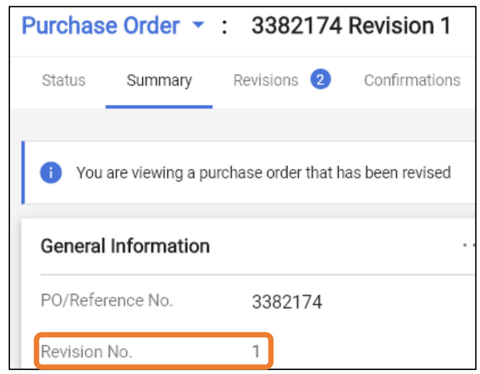
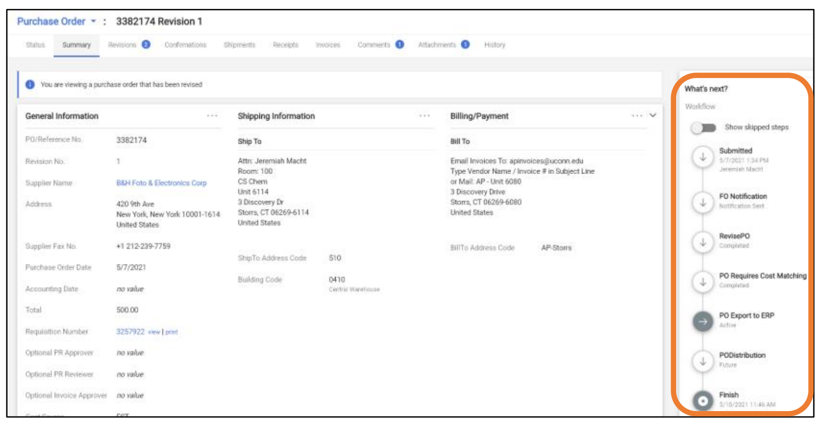
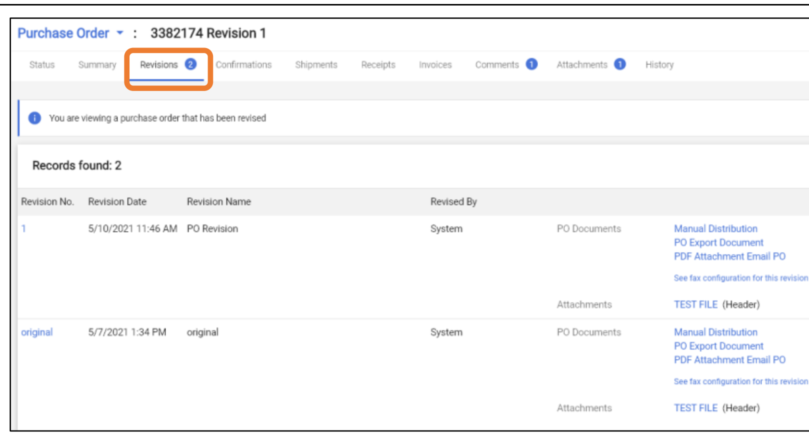
When you are done editing, go to the Document Available Actions drop-down list at the top of the PO, and select Finalize Revision from the list.</td><td>
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>3</td><td>In the popup text box that appears, it is very important to specify <u>what changed</u> AND <u>the reason for the change</u>.

Click Save when done.

Note the warning that Finalizing the revision does not automatically save the changes that you made. All changes must be saved in their individual Edit boxes or forms.

The PO is placed in workflow and the revision document will be created during distribution.</td><td>


</td></tr>
<tr><td>4</td><td>To view Approvals go the Status sidebar and view the What's Next? section.</td><td>
</td></tr>
<tr><td>5</td><td>Click on the Revisions tab to see all of the revisions on the PO.</td><td>
</td></tr>
</table>

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HUSKYBUY UCONN

Strategies for Splitting Line Items on a PR/PO

Overview This user-guide will explain how and when to split line items on a requisition or a PO. The first half will show the different ways to split the costs on a requisition or a PO, along with the pros and cons of each. The second half will explain how to do it. **This procedure can be used on Requisitions and POs that come from a catalog supplier, a non-catalog form, or a Disbursement Voucher form.**

It will help your understanding if you are familiar with the related job-aids listed below.

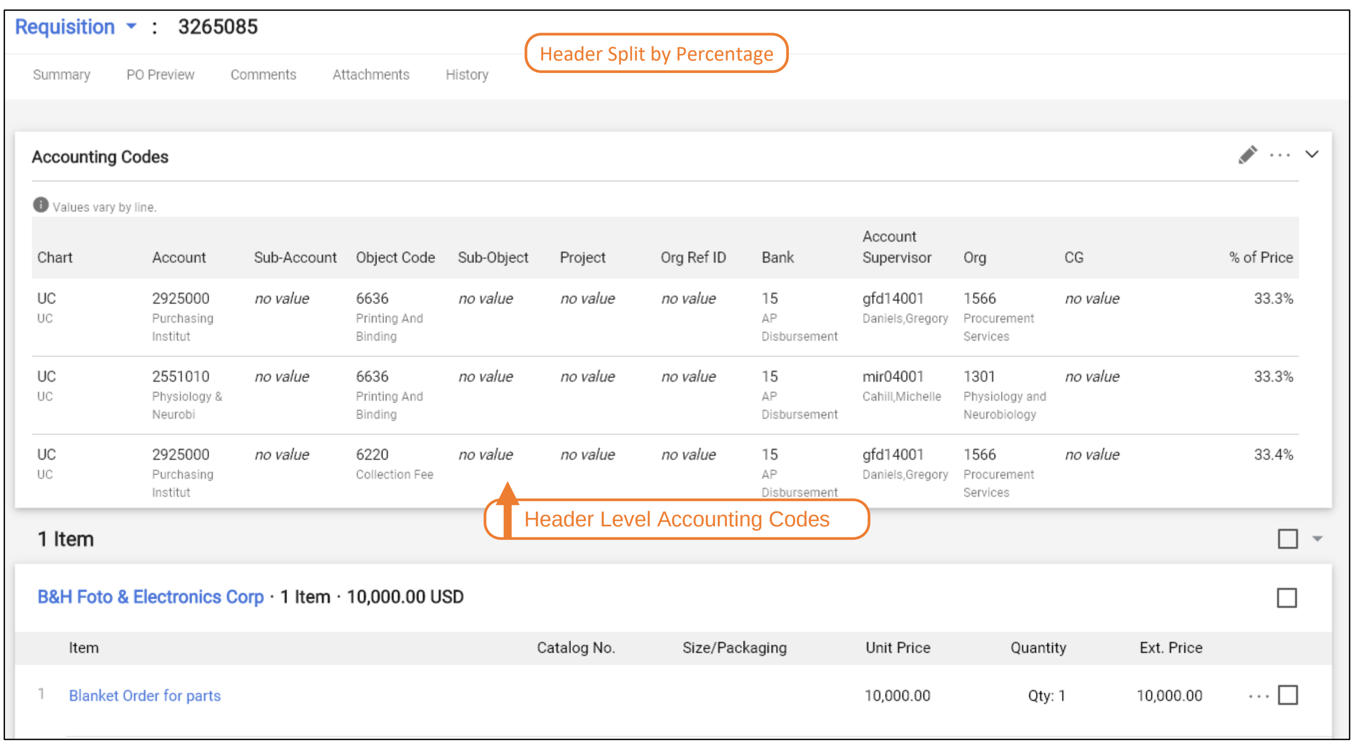
Related Job-Aids

- Setting Your Profile Preferences
- Shopping with Forms
- Shopping with the Blanket Order Form
- Draft Requisitions
- Purchase Order Amendments

Contents Included within this user-guide you will find:

The following examples show a Blanket Order being split three different ways in the draft requisition. The choice about which method to use when splitting the cost between two or more accounts may depend on how the invoice will come in. If you know the percentages of the splits, splitting in the header is the most common way to do it.

Splitting the order in the Header:



- Splitting accounts in the header can only be done by percentage.
- Every invoice that comes in will be split between these 3 accounts at these percentages, regardless of the number of line items.

Splitting the order in the Line Item by price:

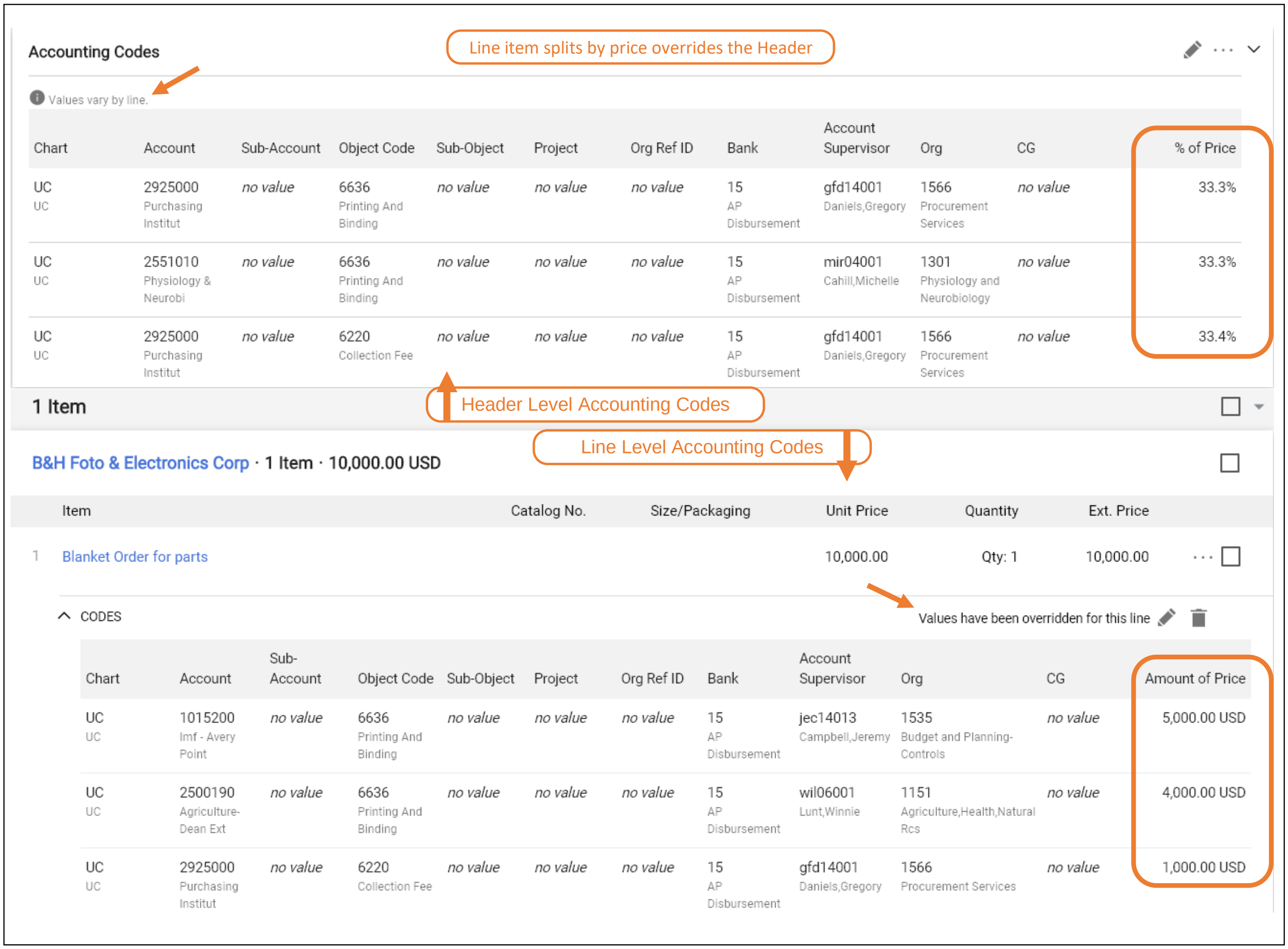


Chart	Account	Sub-Account	Object Code	Sub-Object	Project	Org Ref ID	Bank	Account Supervisor	Org	CG	% of Price
UC UC	2925000 Purchasing Institut	no value	6636 Printing And Binding	no value	no value	no value	15 AP Disbursement	gfd14001 Daniels,Gregory	1566 Procurement Services	no value	33.3%
UC UC	2551010 Physiology & Neurobi	no value	6636 Printing And Binding	no value	no value	no value	15 AP Disbursement	mir04001 Cahill,Michelle	1301 Physiology and Neurobiology	no value	33.3%
UC UC	2925000 Purchasing Institut	no value	6220 Collection Fee	no value	no value	no value	15 AP Disbursement	gfd14001 Daniels,Gregory	1566 Procurement Services	no value	33.4%

1 Item

B&H Foto & Electronics Corp · 1 Item · 10,000.00 USD

	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	Blanket Order for parts			10,000.00	Qty: 1	10,000.00

CODES

Chart	Account	Sub-Account	Object Code	Sub-Object	Project	Org Ref ID	Bank	Account Supervisor	Org	CG	Amount of Price
UC UC	1015200 Imf - Avery Point	no value	6636 Printing And Binding	no value	no value	no value	15 AP Disbursement	jec14013 Campbell,Jeremy	1535 Budget and Planning-Controls	no value	5,000.00 USD
UC UC	2500190 Agriculture-Dean Ext	no value	6636 Printing And Binding	no value	no value	no value	15 AP Disbursement	wil06001 Lunt,Winnie	1151 Agriculture,Health,Natural Rcs	no value	4,000.00 USD
UC UC	2925000 Purchasing Institut	no value	6220 Collection Fee	no value	no value	no value	15 AP Disbursement	gfd14001 Daniels,Gregory	1566 Procurement Services	no value	1,000.00 USD

- Splitting the line items by price should only be done if you know the invoice will be paid in full. AP personnel will not know how to apply the payment if it is for less than the full amount. *(See the **Example** below.)*
- Splits in the line item will override any splits that are in the Header.

Example:

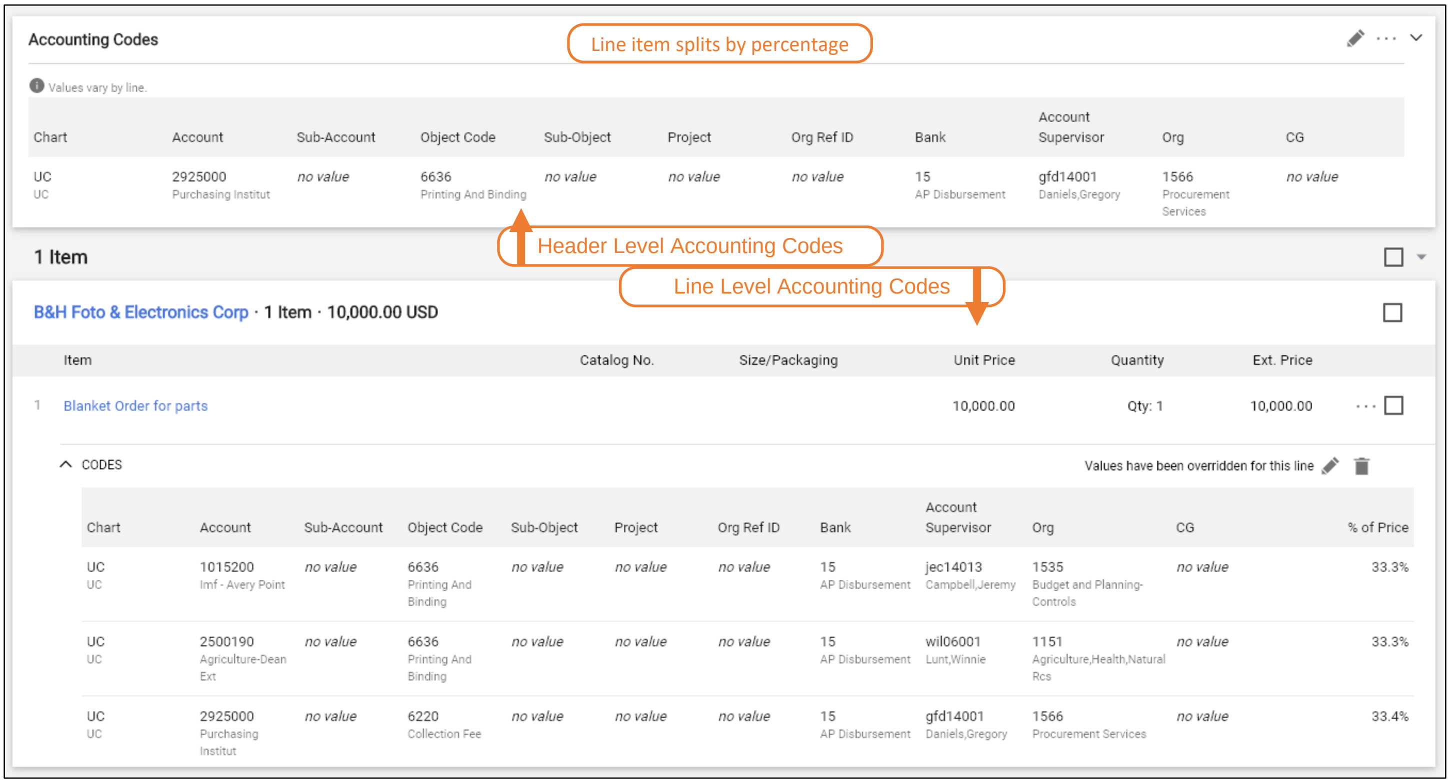
In this example where the line item is split by price, and an invoice comes in for less than the full amount, $4,000 for example, AP will not know where to apply it. For this reason, their default strategy is to apply it to the top line first. That will leave $2,000 remaining on the top line. If another $4,000 invoice comes in, $2,000 of it will be applied to the top line and the rest to the second line. This will continue on until all of the accounts are paid off.

In order to avoid this behavior, it is best practice to always split by **% of Price**, unless you know with absolute certainty that the invoice will always come in for the full amount.

Note:

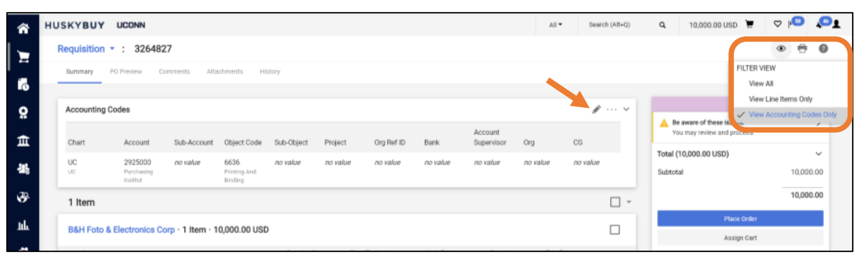
Even though we are describing changes to a Purchase Requisition here, splits can be made to either the Requisition or the Purchase Order following these procedures. It is the exact same pop-up window that is used for both. However, once an invoice has been processed on the order, no more changes can be made for splitting accounts.

Splitting the order in the Line Item by percentage:



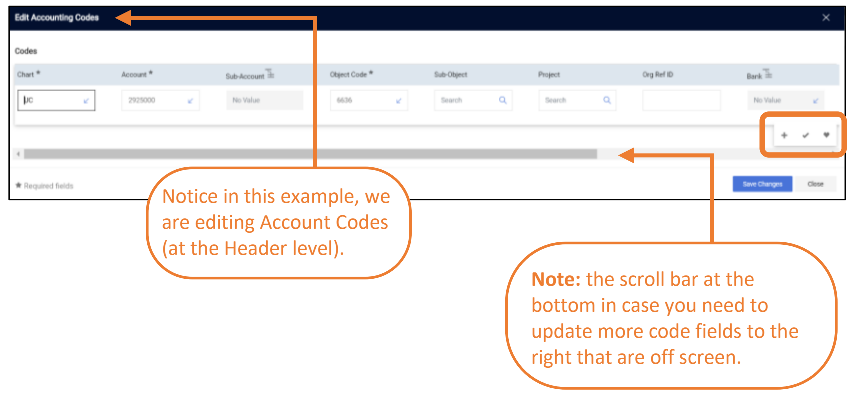
- Splitting the line items by percentage will override any splits that are in the Header.
- Each invoice that comes in for less than the full amount will be split according to the percentages that are set in the line items.

Process Steps:

Step	Action	Screenshot
Splitting Accounts in the Header		
1	In the requisition, or the PO, you can either scroll down to the Accounting codes section or click on the **Filter View** eye icon to display the *accounting codes only* or view *line items only*. Click on the **Pencil Edit** button in the *header* section. **Accounting Codes** section will allow you to make changes at the *Header* level which affects all lines on your requisition. The Accounting Codes section allows you do split your lines by only *percent of price*.	

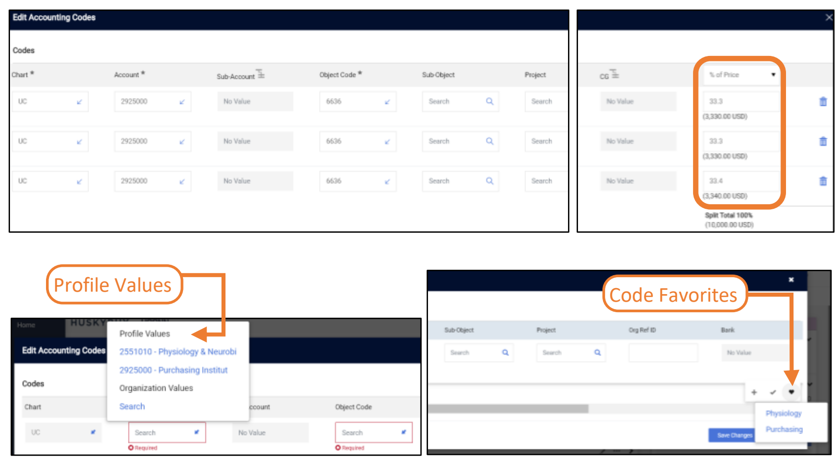
<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>2</td><td>In the resulting Edit Accounting Codes pop-up screen, click on the add split icon right of the screen.

Note: At first glance, you won't see an option to split codes , recalculate/validate or view your code favorites but if you hover your mouse over the code screen these icons will appear:

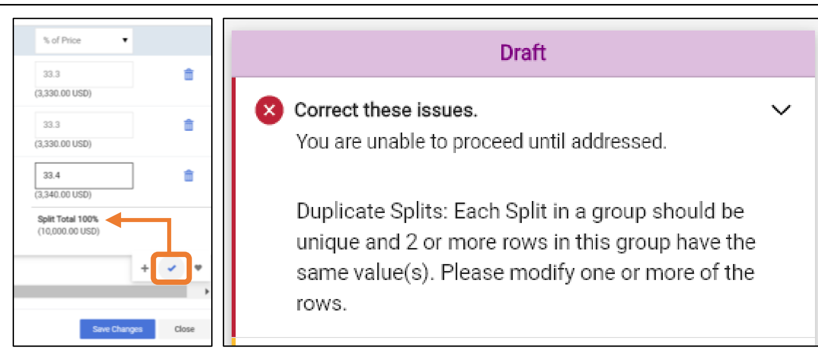
+ = Add a Split Account Code
✔ = Recalculate/Validate Codes
♥ = Code Favorites</td><td>
</td></tr>
<tr><td>3</td><td>Every time you click on the add split icon, another line is added to the header.
(I clicked it twice in this example.)

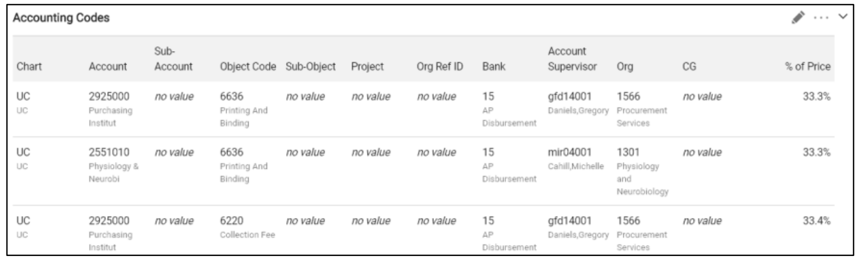
Add the account codes and the percentages you want to use. Notice that the % of Price drop-down in the top right corner. This is the only choice you have in the header.

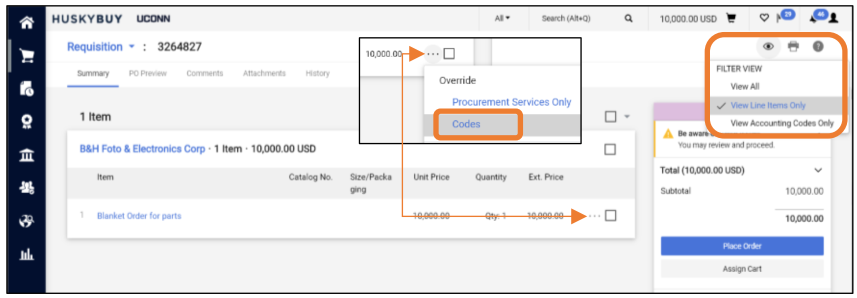
Notice also that if you have your account codes setup in your profile preferences, you can select from that shorter list by clicking on the link within your Code Default Profile Values OR Code Favorites. See the <u>Setting Your Profile Preferences</u> user guide for more information.
Note: The account fields have either an arrow or a magnifying glass.

↙ = Code Default Present
🔍 = Search for Code</td><td>
</td></tr>
<tr><td>4</td><td>When done, click on the recalculate / validate values icon to confirm the values.

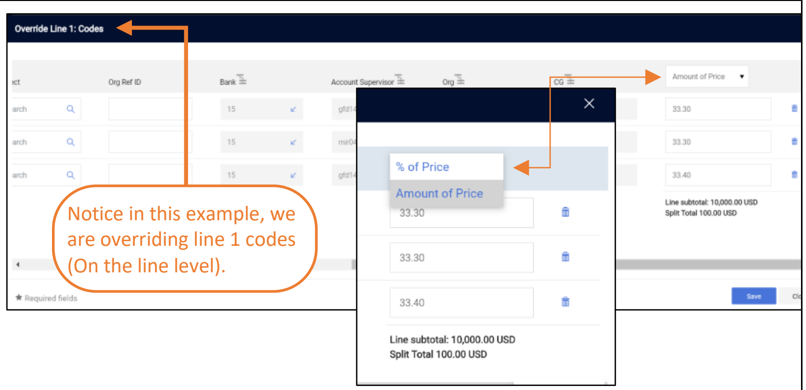
Click Save to complete.

After completing you may see a message in the status sidebar such as this example. Make sure you have unique account strings in your split accounts.</td><td>
</td></tr>
</table>

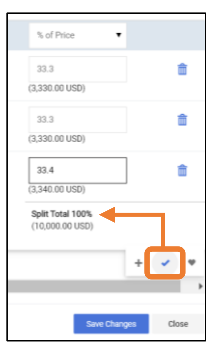
<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>5</td><td>You will be returned to the requisition or PO to continue.</td><td>
</td></tr>
<tr><td colspan="3">Splitting Accounts in the Line Item</td></tr>
<tr><td>1</td><td>The Line Items section will allow you to make code changes that only affect the line you are updating.

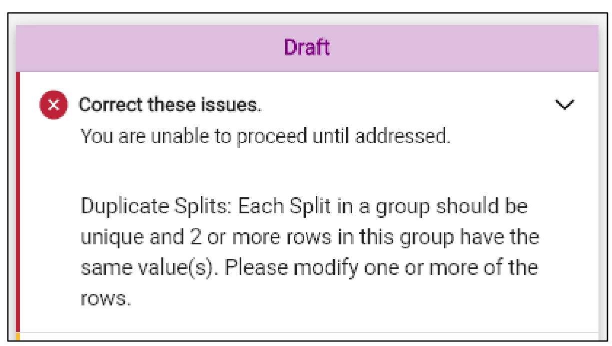
In the requisition or PO, select the 3 Dot Menu button and click Codes on the line level.</td><td>
</td></tr>
<tr><td>2</td><td>This procedure is identical to splitting the accounts in the header, with one exception:

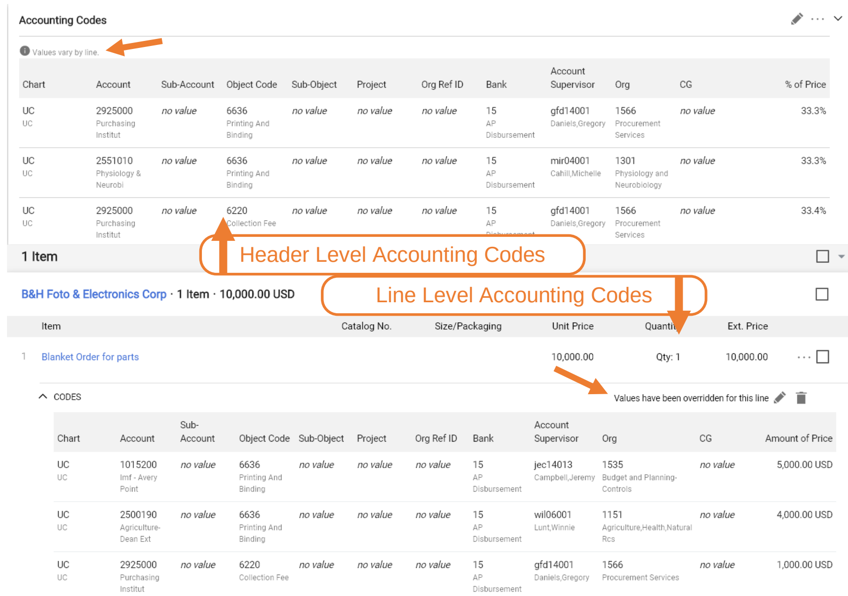
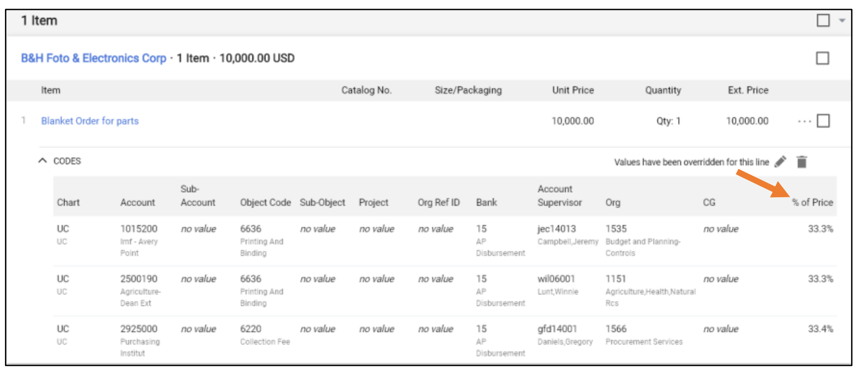
The line item section allows you to split your lines by both percent of price and amount of price.

Remember the caveats of splitting by price.
Splitting the line items by price should only be done if you know the invoice will be paid in full.
AP personnel will not know how to apply the payment if it is for less than the full amount.</td><td>• 
</td></tr>
<tr><td>3</td><td>When done, click on the recalculate / validate values icon to confirm the values.

Click Save to complete.

After completing you may see a message in the status sidebar such as this example. Make sure you have unique account strings in your split accounts.</td><td>


</td></tr>
</table>

Step	Action	Screenshot
4	You will be returned to the requisition or PO to continue. Notice the *Values vary by line* and *Values have been overridden* messages. If changes need to be made, edit the codes to bring up the pop-up window again and repeat this process.	
5	Here we edited the lines and changed it from the **Amount of Price** to a **% of Price**.	

Remember:
Even though we are describing changes to a Purchase Requisition here, splits can be made to either the Requisition or the Purchase Order following these procedures. It is the exact same pop-up window that is used for both. However, once an invoice has been processed on the order, no more changes can be made for splitting accounts.

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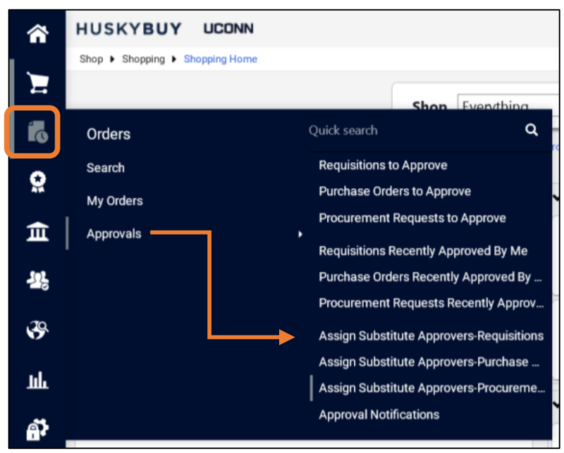
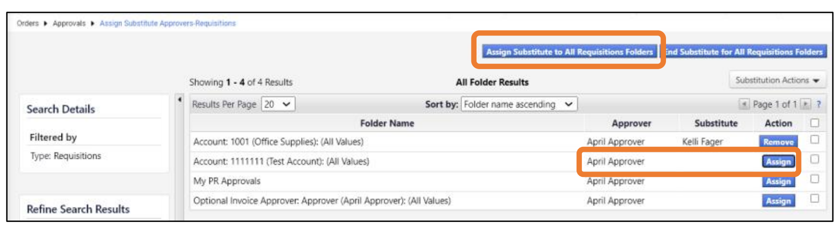
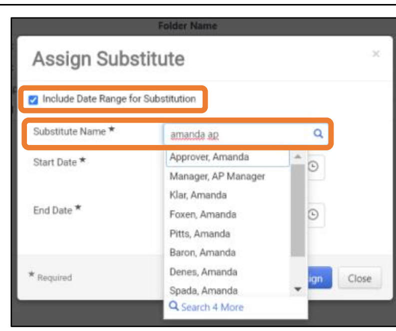
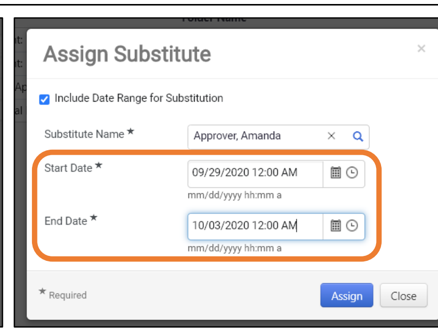
(860) 486-2BUY (2289)
HuskyBuySupport@UConn.edu

Assign Substitute Approver

Overview	This user-guide will assist you with assigning a substitute Approver when an Approver is unable to tend to the carts/documents assigned to them, i.e. vacation, personal leave, etc., the Approver may "Assign" a Substitute Approver. The Substitute Approver will receive all future orders until the Approver unassigns the Substitute. When there is not a secondary approver on a workflow step and/or department rule, to ensure requisitions are processed in the approver's absence, the approver can assign a substitute approver.
Related Job-Aids	• Assigning / Unassigning Carts • Requisition Approval
Contents	Included within this user-guide you will find: • *Assign Substitute Approver*

Step	Action	Screenshot
Assign Substitute Approver		
1	Click on **Orders > Approvals > Assign Substitute Approvers-…** You can choose 3 document types: 1. Requisitions 2. Purchase Orders 3. Procurement Requests	
2	Choose either Assign Substitute to All Requisition Folders or Assign for only one folder.	
3	Enter desired name in the **Substitute Name** field shown here to locate the Approver you wish to assign as your substitute. Matches to your desired name will appear. Select the appropriate one. If desired, choose a start and end date range and click Assign.	 

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Supplier PO Invoice Approval

Overview Supplier Invoices are entered by Accounts Payable or via the supplier portal by the supplier. They can also be uploaded electronically as an E-Invoice by the supplier.

Approvals **Fiscal Officer** approval is needed for invoices over 250.00 for a payment to go out. For invoices under 250.00 the Fiscal Officer will get a notification that an invoice has been processed.

PI approval is needed on grant funds using the object code of 6603, 6604, 6626 or 7650 and when CG Responsibility Group is populated on the line of coding.

Matching Tolerances AP can enter invoices if within 10% on the line, but not to exceed $250.00 (except Construction & Personal Service Agreements)

Receiving is needed if PO is over $5000 and/or if they contain the following 7 commodity codes:

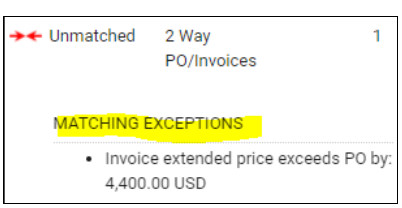
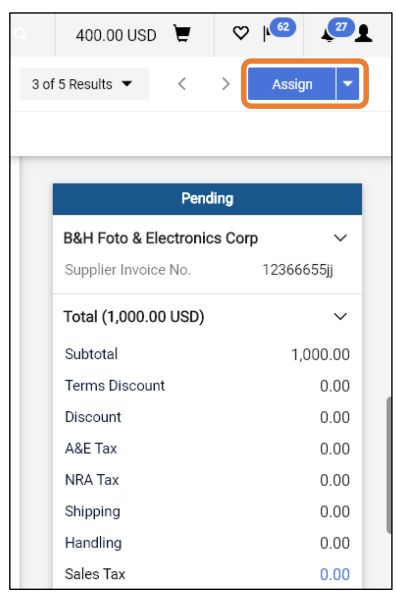
371 (FOB Chemicals) **372** (Janitorial Chemicals) **405** (Pharmaceuticals) **900** (EH&S Radioactive)
930 (EH&S Clean Air Devices) **940** (EH&S Restricted Equipment) **950** (Regulated Waste)

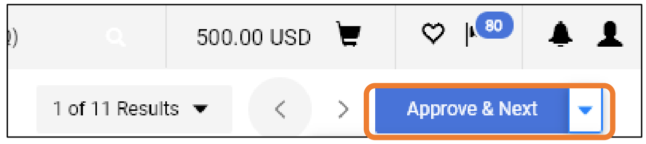
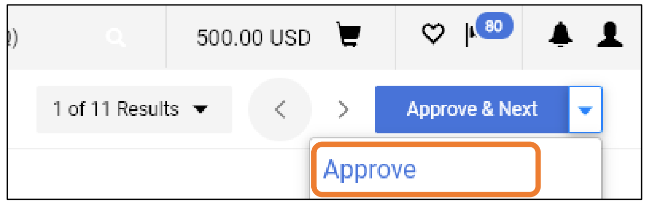
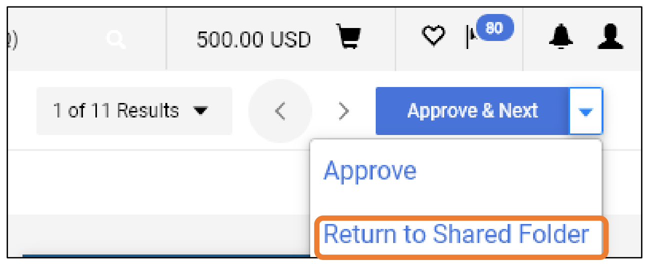
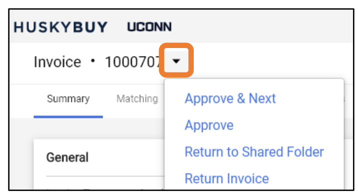
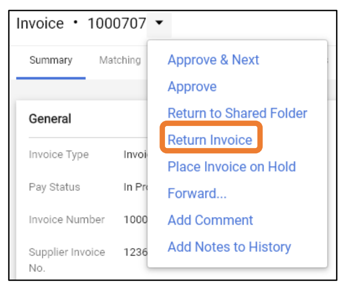
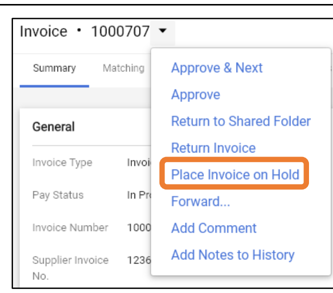
Construction Tolerances; Receiving is NOT required for Construction Orgs, 1731, 1832, or 1863.

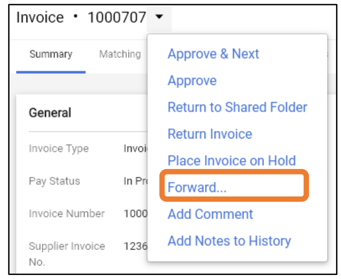
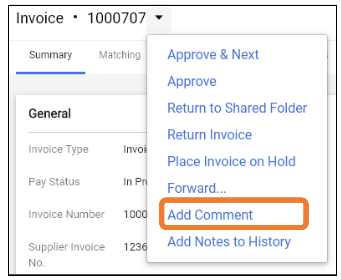
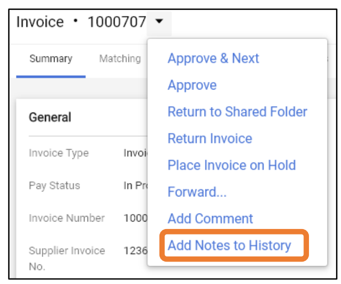
SPS Tolerances: Receiving is NOT required for object codes = 6603, 6604, 6626, 6638 or 7650 and when CG Responsibility Group is Populated.

Contents Included within this user-guide you will find:

Process Steps:

Step	Action	Screenshot
Approving a Supplier Invoice		
1	After reviewing the attached supplier invoice for accuracy **Assign the invoice to yourself.** Once assigned you will get the options to **Approve & Next, Approve, and Return to Shared Folder** for another FO to assign to themselves. **NOTE:** If you don't have the option to approve, then your invoice is un-matched. Go to the Matching tab to see the error message. 	

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>2</td><td><u>Approve & Show Next</u> - Allows you to approve the current invoice then will move to the next invoice pending approval.</td><td>
</td></tr>
<tr><td>3</td><td><u>Approve</u> - Provides the ability to approve the selected invoice.</td><td>
</td></tr>
<tr><td>4</td><td><u>Return to Shared Folder</u> – Allows you to replace your assigned document back into the shared folder for another person to assign to themselves.</td><td>
</td></tr>
<tr><td>5</td><td><u>Get more actions</u> - click on the document dropdown arrow at the top of the page.</td><td>
</td></tr>
<tr><td>6</td><td><u>Return Invoice</u> - This will return the invoice to the invoice owner or invoice creator. If you select a user, they will receive an email indicating that an invoice has been turned. A comment is needed to let the recipient know why the invoice is being returned.</td><td>
</td></tr>
<tr><td>7</td><td><u>Place Invoice on Hold</u> - This places the invoice on hold and prompts you to add a note. The hold will show on the approval tab and history tab. This will prevent anyone else from taking action on this invoice.</td><td>
</td></tr>
</table>

Step	Action	Screenshot
8	**<u>Forward</u>** - Occasionally, an approver may decide that a different individual is a more appropriate approver for a invoice. Using this feature will relinquish your approval. You will get a prompt to add a note.	
9	**<u>Add Comment</u>** - Choose who you would like to send an email regarding the comment. By default, the current user (typically AP staff) and the requisitioner are listed. Users are listed with their relationship to the invoice (i.e. Receipt Creator, Requisition prepared by, etc.) If you would like to email other users, click the add **email recipient...** link and locate those users. Comments can be added after the invoice is created.	
10	**<u>Add Notes to History</u>** – Allow you to add notes to the history tab	

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HUSKYBUY UCONN

Creating a Quantity Receipt

Support
(860) 486-2BUY (2289)
HuskyBuySupport@UConn.edu

Overview HuskyBuy requires the user to create a quantity receipt for recordkeeping purposes.

This is REQUIRED on all quantity PO's over $5000 and/or if they contain the following 7 commodity codes:

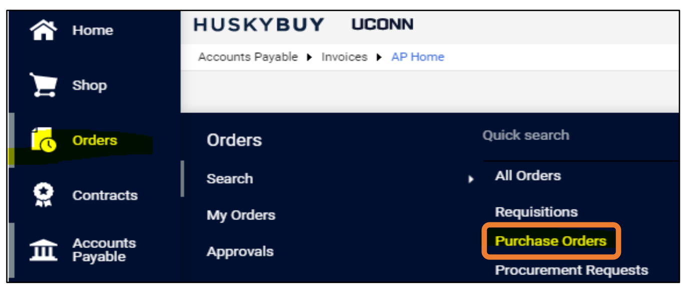
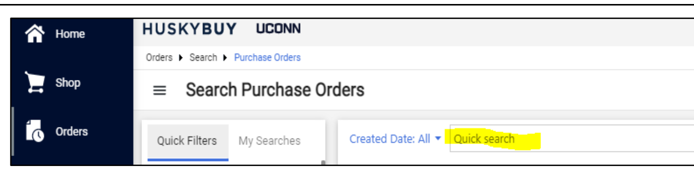
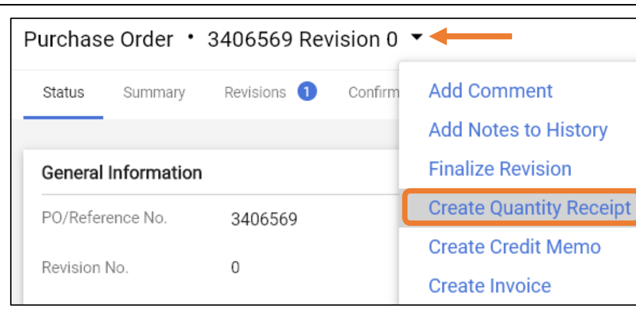
371 (FOB Chemicals) **372** (Janitorial Chemicals) **405** (Pharmaceuticals) **900** (EH&S Radioactive)
930 (EH&S Clean Air Devices) **940** (EH&S Restricted Equipment) **950** (Regulated Waste)

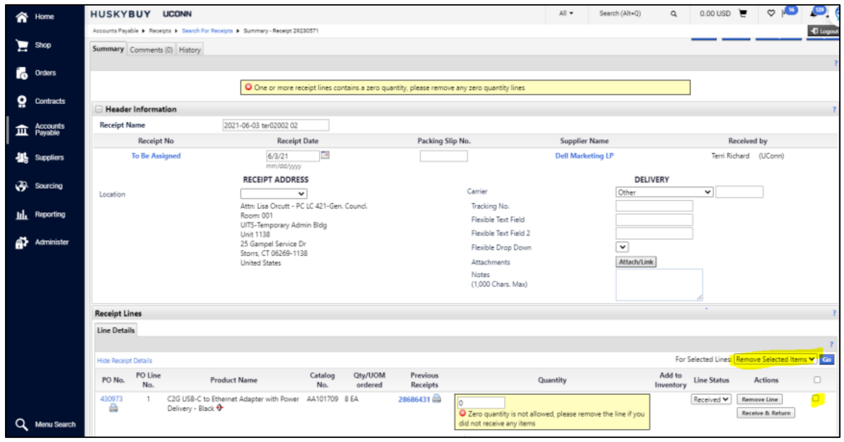
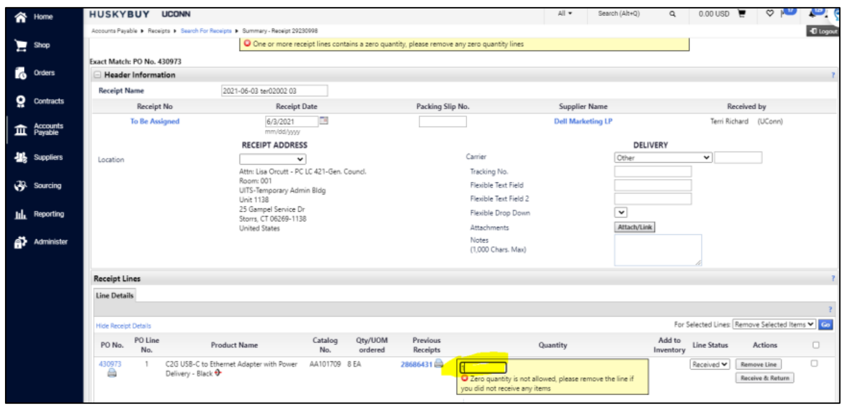
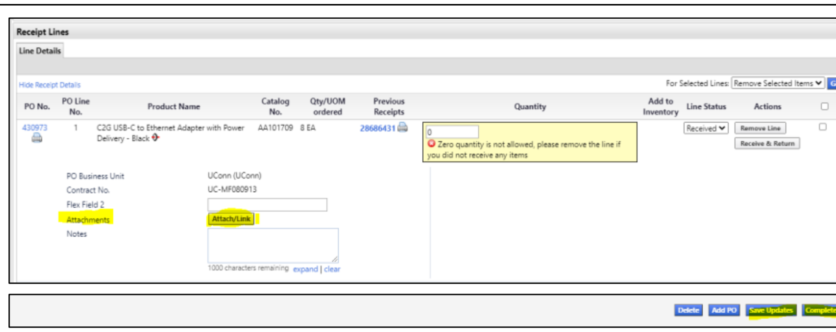
(Construction does NOT require receiving.)

Contents Included within this user-guide you will find:

- *How to create a quantity receipt*
- *How to indicate that you have received and returned goods*

Process Steps:

Step	Action	Screenshot
How to create a quantity receipt		
1	Navigate to Documents on the left blue bar navigation menu and then click on Orders/Purchase Orders in the pop-up window.	
2	Type in the purchase order number and enter.	
3	From the search results, open the purchase order by clicking **the PO number**. This will open the purchase order. From the Purchase Order drop-down box, select **Create Quantity Receipt.**	

Step	Action	Screenshot
How to indicate that you have received goods		
4	The receipt will be automatically populated with the PO information - including remaining number of items to be received. If you have a multi-line PO but only want to receive one of the lines, check the box next to the lines you do not want to receive. Then hit GO to "Remove Selected Items" You will be left with only the line items you want to receive.	
5	Add any additional information such as Packing Slip, Attachments, Carrier, Tracking or Notes. Review the line level data. Make any updates as needed.	
6	It's best practice to attach the packing slip to this document. Click **Save Updates**, then **Complete.**	

HUSKYBUY UCONN

Document Searches

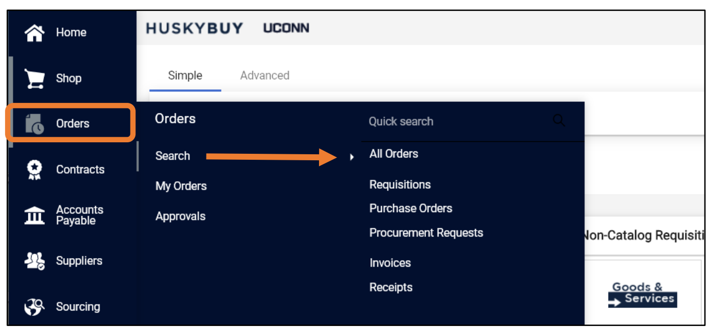
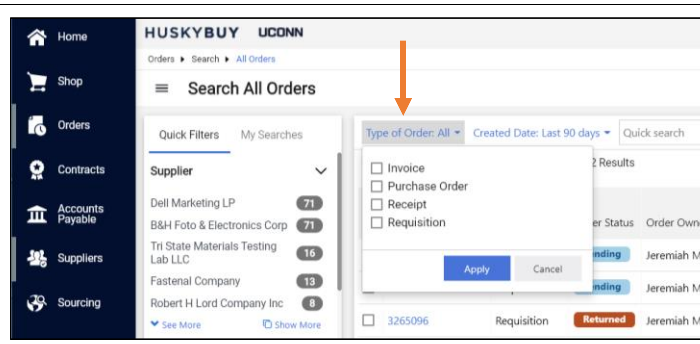
Support
(860) 486-2BUY (2289)
HuskyBuySupport@UConn.edu

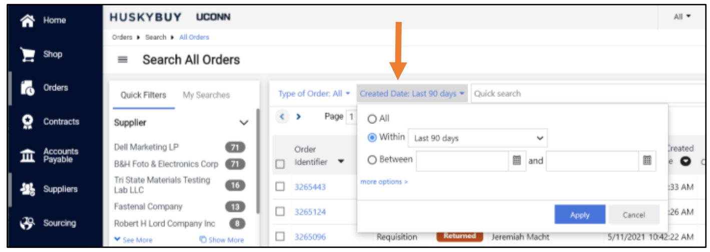
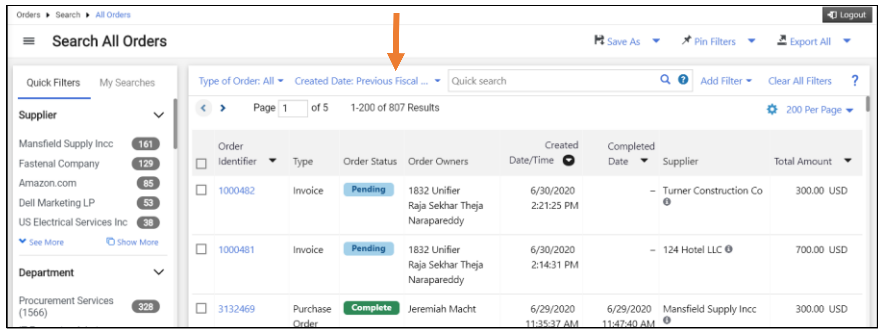
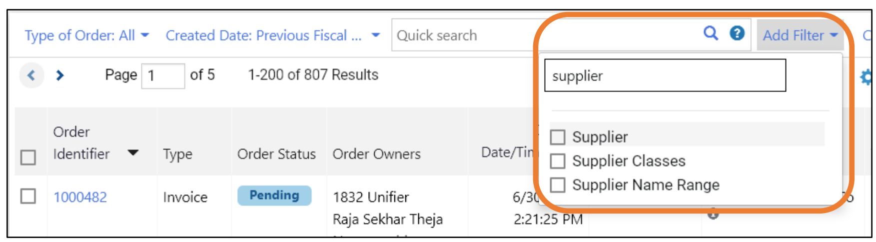
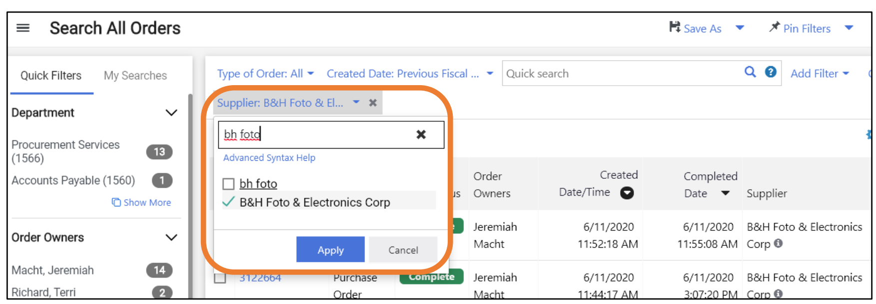
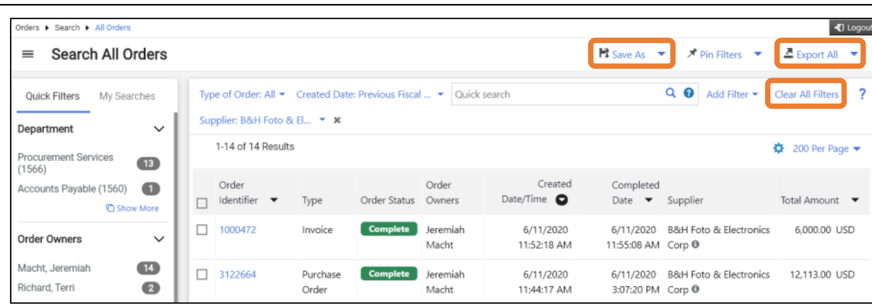
Overview Within HuskyBuy, you can search for documents such as requisitions, purchase orders, invoices, receipts and procurement requests.

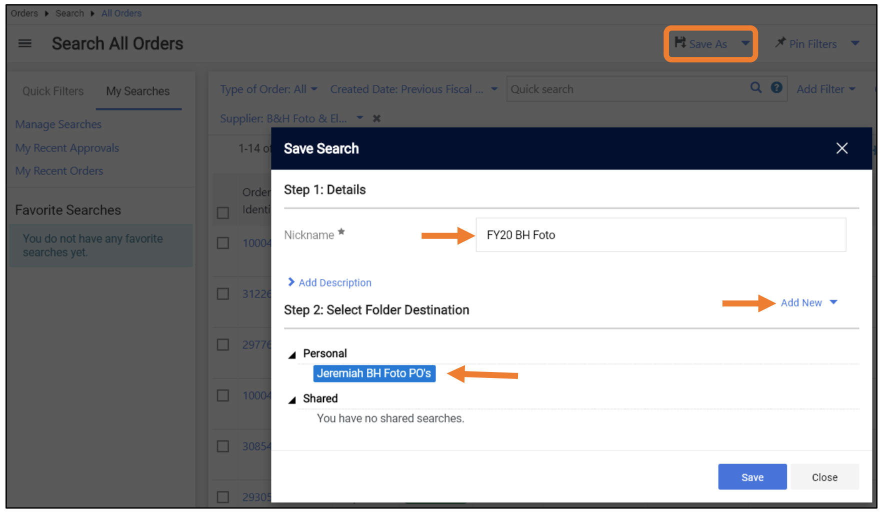
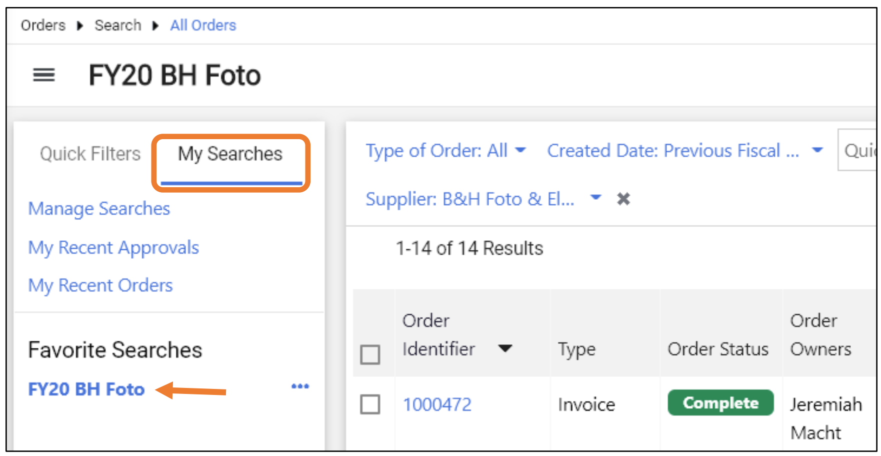
Contents Included within this user-guide you will find:

Additional Processes Please note: Shoppers only have access to orders they shopped for. Also, shoppers cannot view or search for another shopper's orders.

Process Steps:

Step	Action	Screenshot
Searching for Documents		
1	Use the icons on the left to go to **Orders > Search** to search all orders, or specific documents such as requisitions, purchase orders, receipts, or invoices.	
2	You can narrow your search down with the filtered menu. In the **Type of Order** dropdown, select from the list - Requisition, Purchase Order, Receipts or Invoice. Add filters using the various dropdown menus Your saved searches are known as **Favorite searches.**	

Step	Action	Screenshot
3	Select a date range from the **Created Date** dropdown list and click **Apply** when ready. This defaults to last 90 days.	
Refining your Search		
1	Here is the sample result from selecting **All** from the previous Fiscal Year. Note that you can continue to refine the search results with filters along the top of the page. For example, we will click on the **Add Filter > Supplier** to show only the requisitions for supplier **B&H Foto**.	
2	A pop-up window appears in order to select the supplier, or group of suppliers, you want to filter by. Select the supplier and **Apply**.	
3	The new results are displayed. You have many choices here. You can: • Export the list to a CSV file • Save search to your **Favorite Searches** • Remove the check-mark and filter by something else • Or click Clear Filters to start over	

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td colspan="3">Saving Search Results</td></tr>
<tr><td>1</td><td>Click on the Save As link.
Give your results a nickname.
Add your results to either a personal or shared folder.
Click Save.</td><td>
</td></tr>
<tr><td>2</td><td>Click on the My Searches link.
Notice under Favorite Searches, your saved search file displays.</td><td>
</td></tr>
</table>

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Contract Searches

Support
(860) 486-2BUY (2289)
HuskyBuySupport@UConn.edu

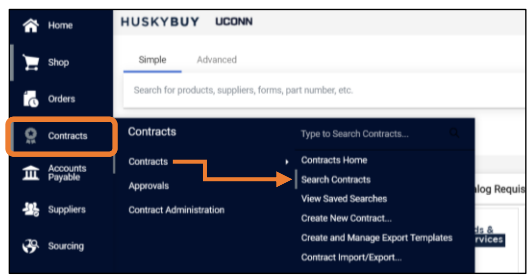
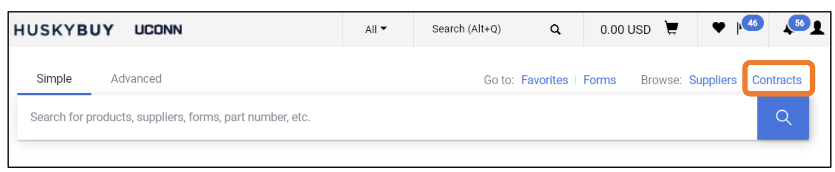
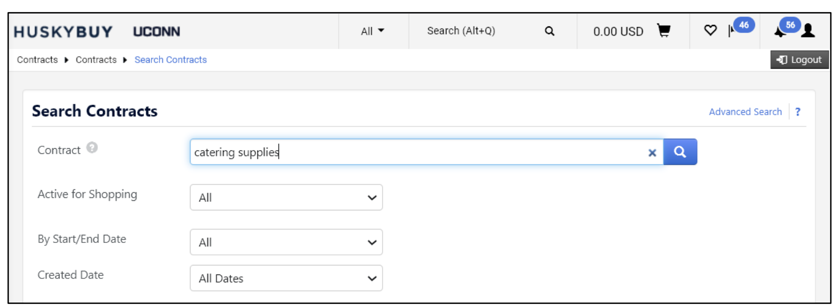
Overview All contracts for current suppliers will now be located within HuskyBuy. Each contract will be labeled appropriately within the description in order to be able to choose the correct contract.

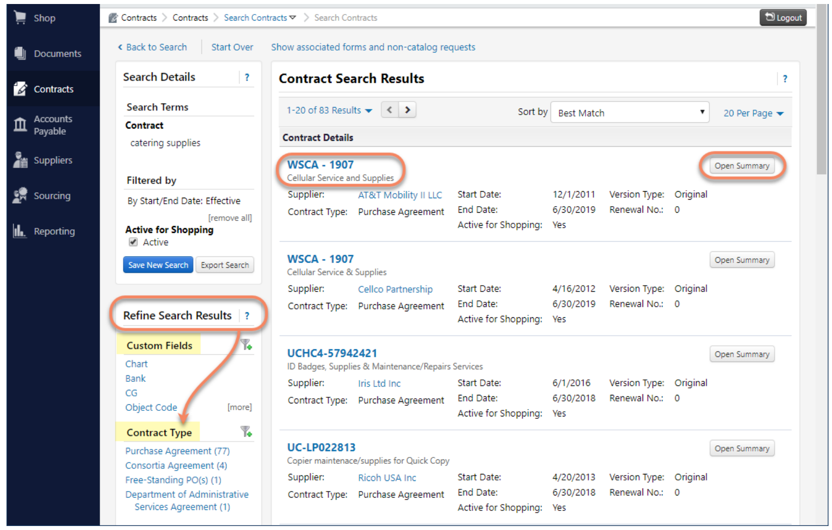
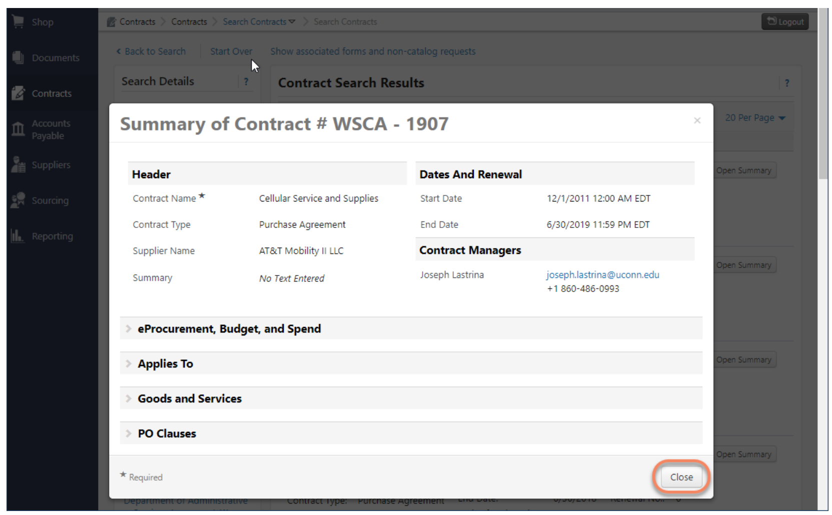
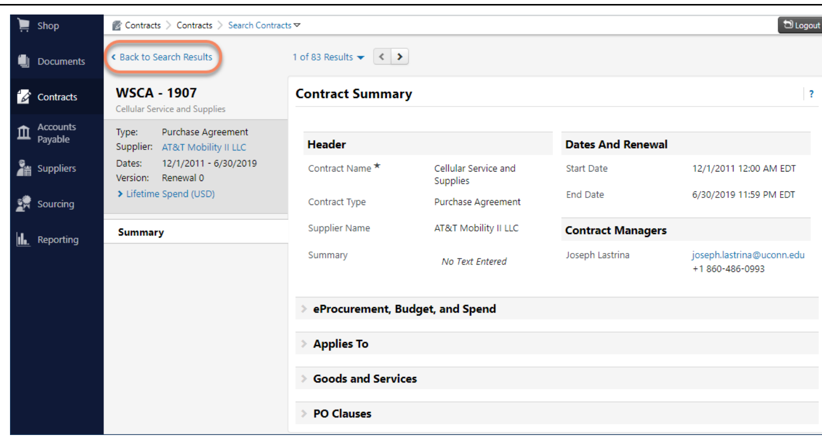
Contents Included within this user-guide you will find:

- *Searching for Contracts*

Additional Information You will now be asked to select a contract for suppliers on non-catalog orders (if available). Every effort will be made to assign "meaningful" contract names to the contracts to help in making the selections.

Process Steps:

Step	Action	Screenshot
Searching for Contracts		
1	To search for a contract, click on **Contracts** on the left navigation bar, then choose **Search Contracts**.	
2	You can also search for a contract, by starting on the Shopping Home page, and click on the blue <u>Contracts</u> link, above the main shopping catalog search field.	
3	Enter your search criteria within the fields to locate a specific contract for a supplier. Enter in a description of the type of goods or services, to begin your search. For example, *catering supplies*.	

Step	Action	Screenshot
4	Choose the contract you would like to view, by clicking on the **Open Summary** button, or the **supplier's name**. If you have a large number of suppliers listed, you can refine your search further by clicking on one or more of the links on the left side of the screen – under **Refine Search Results**. Scroll down to see more. These include: • Custom Fields • Contract Type • Supplier Name • Supplier Class • And more.	
5	Clicking on the **Open Summary** button shows the summary results for the selected contract. Each section can be opened and viewed as necessary. Click **Close** to get back to the list.	
6	Clicking on the **supplier's name** (back in step 4) shows the same summary results but in a slightly different format. Each section can be opened and viewed as necessary. Click on **Back to Search Results** to get back to the list.	

HUSKYBUY UCONN
Searching Suppliers

Support
(860) 486-2BUY (2289)
HuskyBuySupport@UConn.edu

Overview Formerly called **vendors**, companies and individuals providing goods and services to the University are now call **suppliers**.

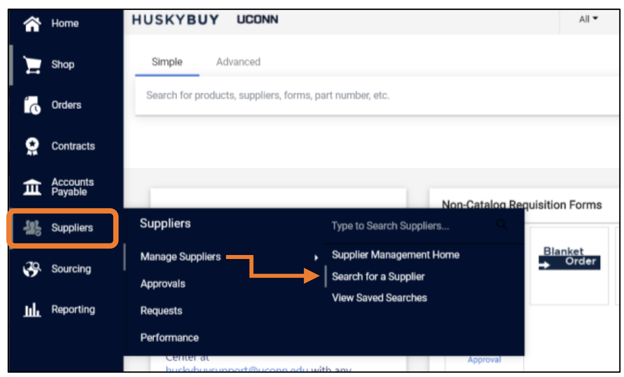
Related Job-Aids

- Supplier Onboarding Process

Contents Included within this user-guide you will find:

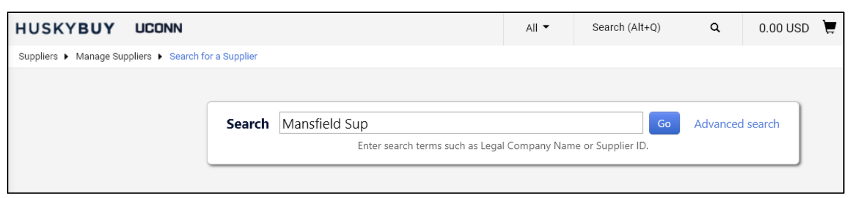
- *Searching for a Supplier*

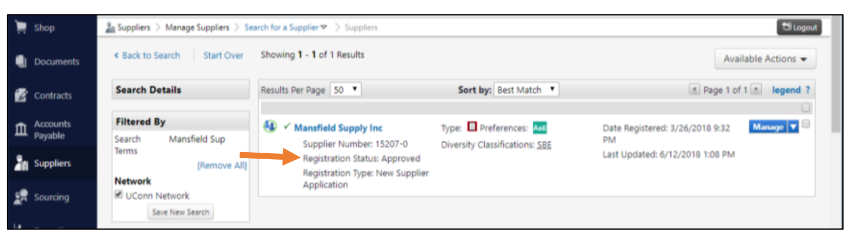
Process Steps:

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td colspan="3">Searching for a Supplier</td></tr>
<tr><td>1</td><td>To search for supplier, navigate to Suppliers > Manager Suppliers > Search for a Supplier.</td><td>
</td></tr>
<tr><td>2</td><td>The search screen will appear.

Enter the name of the supplier, or the Supplier ID (if known) and click Go.

Note: The search will work with any part of the supplier's name. Wildcard characters are not necessary.

Note: You can see Registration Status here as well.</td><td>


</td></tr>
</table>

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HUSKYBUY UCONN

System Definitions

Support
(860) 486-2BUY (2289)
HuskyBuySupport@UConn.edu

System definitions		
	Form	On HuskyBuy a form is merely an "electronic" version of a paper form, which can be filled out, added to a cart and then submitted. It can have fields that are required and can also have attachments.
	Cart	A cart holds details about the items or services that you would like to order. Carts are draft entities; they do not become actual orders until they are submitted and approved. Once the cart has been submitted, it becomes a Purchase Requisition (PR).
	Draft Requisition	A shopping cart turns into a draft requisition after the cart has been submitted for Review, and before the order has been placed. This is where things like the shipping address and accounting codes are checked and corrected.
	Purchase Requisition	A draft requisition turns into a purchase requisition (PR) once it has been submitted into the workflow. A requisition is the document in HuskyBuy that turns into the Purchase Order (PO).
	Purchase Order	A requisition turns into a purchase order once it is approved in requisition workflow (in HuskyBuy). Once the requisition is approved, a purchase order number is generated and the purchase order is encumbered in KFS and distributed automatically to the supplier.
	FOAPAL	FOAPAL is an acronym for Fund, Organization, Account, Program, Activity, and Location. In the simplest terms, a FOAPAL is a set of accounting codes that, together, tell a story about any particular transaction. For UConn, these codes are the Organization code, account number, object code, and commodity codes.
	Invoices	Invoices in HuskyBuy have an approval process (or workflow) that will require that the invoice be reviewed/approved. Once an invoice is fully approved and complete, it will be marked as "Ok to Pay" and exported to KFS for payment.
	Non-PO Line	An invoice line that is not associated to a line of a purchase order in the application. Non-PO lines can be entered by AP when a vendor bills them for an extra item.
	Receipts	An indication that either goods or services have been received or returned.

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HUSKYBUY UCONN

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HuskyBuySupport@UConn.edu

User Roles and Definitions

	Role	Definition
HuskyBuy Role Definitions		
	SHOPPER	This is the "default" role for anyone in the University with an active NetID. Shoppers can log in, shop for items, and assign their shopping cart to a requester/approver. Shoppers do not have the authority to submit purchase requisitions without intervention from a requester/approver.
	REQUESTER	Requesters are Similar to shoppers except they have the ability to submit purchase requisitions up to $5,000* without a Fiscal Officer's approval. Requesters may submit requisitions greater than $5,000 but these requisitions will require Fiscal Officer approval.
	APPROVER	Approvers have the responsibility to approve orders on their accounts which are greater than $5,000*. They are also required to approve invoices that are greater than $250 or if the invoice does not match the purchase order. Approvers will be assigned the title of Fiscal Officer (FO) for their department, or they will be a Delegate Approver for the FO.
		*Some requisitions will require fiscal officer approval regardless of dollar amount.
	BUYER	
	SOURCING ADMIN	
	PROCUREMENT MANAGER	
	AUDIT	
	INVOICE CREATOR	
	AP MANAGER	
	SUPPLIER APPROVER	
	CONSTRUCTION APPROVER	
	CONSTRUCTION SHOPPER	
	SHOPPER (INVOICE EDIT)	

	Role	Definition
	TAX GROUP APPEOVER	
	INDIVIDUAL MBU ADMIN	

UConn Roles Matrix

	Shopper (default)	Requester	Approver	Buyer	Sourcing Admin	Procurement Manager	Individual MBU Admin	Audit	Invoice Creator	AP Manager	Supplier Approver	Construction Approver	Construction Shopper	Shopper (Invoice Edit)	Tax Group Approver
View/Browse Catalogs	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Create Catalog and Non-Catalog Carts/Orders	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Submit Order into Workflow (Create Requisition)	✕	●	●	●	●	●	●	✕	✕	●	✕	●	✕	✕	✕
View Department Requisitions (as defined by KFS)	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
View Organization Requisitions	✕	✕	✕	●	●	●	●	●	●	●	✕	✕	✕	✕	✕
Approve/Reject/Revise Requisitions in Workflow	✕	✕	●	●	●	●	●	✕	✕	●	✕	●	✕	✕	●
Approve/Reject/Revise Requisitions on behalf of another user	✕	✕	✕	✕	✕	●	●	✕	✕	✕	✕	✕	✕	✕	✕
View Department Purchase Orders (as defined by KFS)	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
View Organization Purchase Orders	✕	✕	✕	●	●	●	●	●	●	●	✕	✕	✕	✕	✕
Approve/Reject/Revise Purchase Order Revisions in Workflow	✕	✕	●	●	●	●	●	✕	✕	●	✕	●	✕	✕	●
Approve/Reject/Revise Purchase Orders on behalf of another user	✕	✕	✕	✕	✕	●	●	✕	✕	✕	✕	✕	✕	✕	✕
Access/View Contract Information	●	●	●	●	●	●	●	●	●	●	✕	●	●	●	●
Create/Edit Contract Information	✕	✕	✕	●	●	●	●	✕	✕	✕	✕	✕	✕	✕	✕
View Department Invoices (as defined by KFS)	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
View Organization Invoices	✕	✕	✕	●	●	●	●	●	●	●	✕	✕	✕	✕	✕
Approve/Return Invoices in Workflow	●	●	●	●	●	●	●	✕	●	●	●	●	●	●	●
Approve/Return Invoices on behalf of another user	✕	✕	✕	✕	✕	●	●	✕	✕	●	✕	✕	✕	✕	✕
Edit Invoices in Workflow	✕	✕	✕	✕	✕	✕	●	✕	●	●	✕	●	●	●	●
Create Receipts	●	●	●	●	●	●	●	✕	●	●	✕	●	●	●	●
Access/View Supplier Information	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Request New Supplier	●	●	●	●	●	●	●	✕	●	●	●	●	●	●	●
Approve/Onboard New Supplier	✕	✕	✕	✕	✕	✕	●	✕	✕	✕	●	✕	✕	✕	✕
Access/View Sourcing Events	●	●	●	●	●	●	●	●	●	●	✕	●	●	●	●
Approve/Reject Sourcing Event Activities in Workflow	●	●	●	●	●	●	●	✕	●	●	✕	●	●	●	●
System Administration	✕	✕	✕	✕	✕	✕	●	✕	✕	✕	✕	✕	✕	✕	✕

All Access to Approval Actions is Governed by Workflow Assignments

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HUSKYBUY UCONN

Supplier Onboarding Process

Overview

All Suppliers are required to register and use the HuskyBuy Supplier Portal that allows them to login to the web-based portal and create invoices which are then "imported" into HuskyBuy. They will also be able to update contact information, including remit address, email address and phone numbers.

- All suppliers must be registered in HuskyBuy in order to initiate and issue payments for goods/services and refunds/reimbursements.
- Changes to address, email or phone numbers will be available immediately after input by the supplier.
- Changes to legal name, tax ID or legal structure are subject to review by Supplier Management approval prior to being active in HuskyBuy

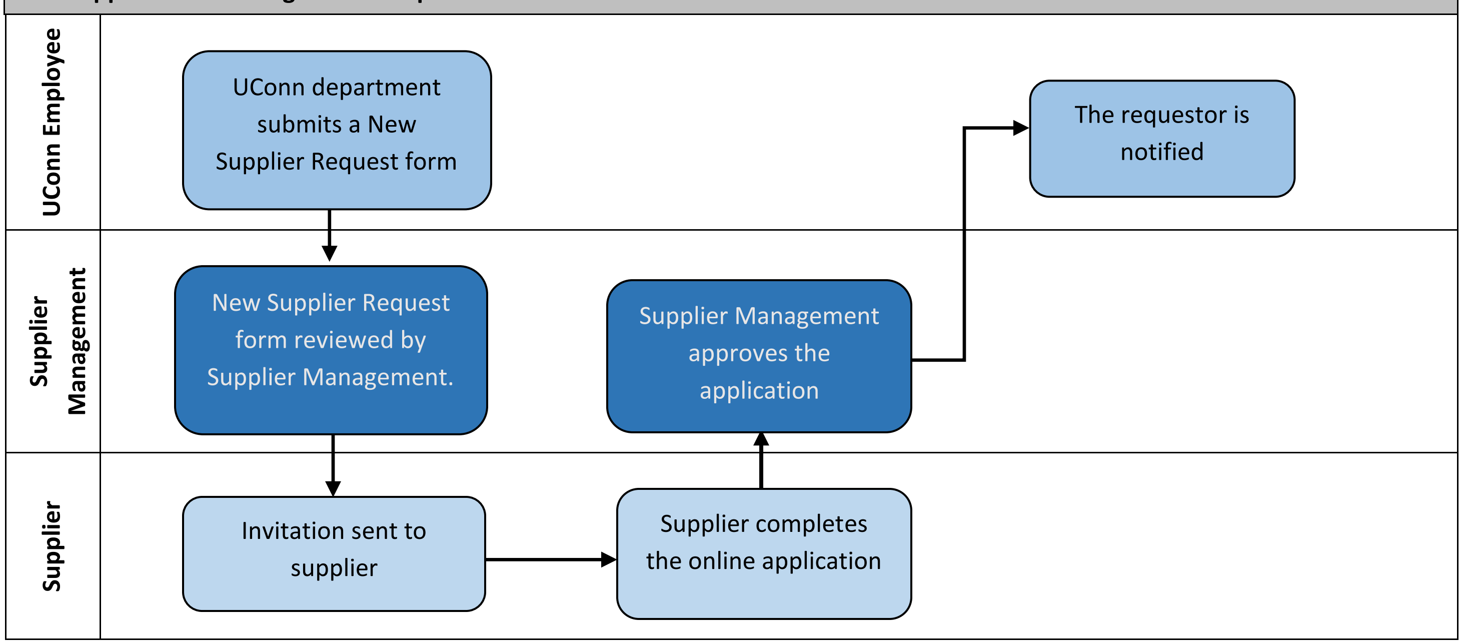
Once in the system, they will enter the appropriate workflow and export to KFS when completed.
Any supplier updates: address, name change, legal structure, etc. needs to be done by the supplier, who should log into the supplier portal.

Contents

Included within this user-guide you will find:

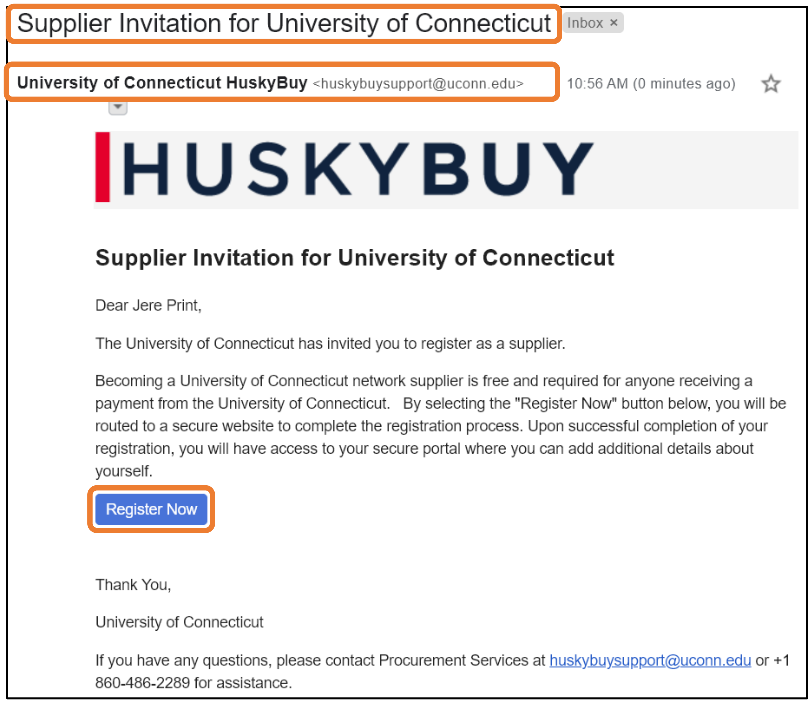
Process Steps:

Step	Action	Screenshot
The Supplier Onboarding Process Explained		



<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>1</td><td>The Supplier Invitation Email is sent after the Request form is approved by Supplier Management.

The supplier receives the Invitation Email and is provided a link to the Supplier Portal via the Register Now button.

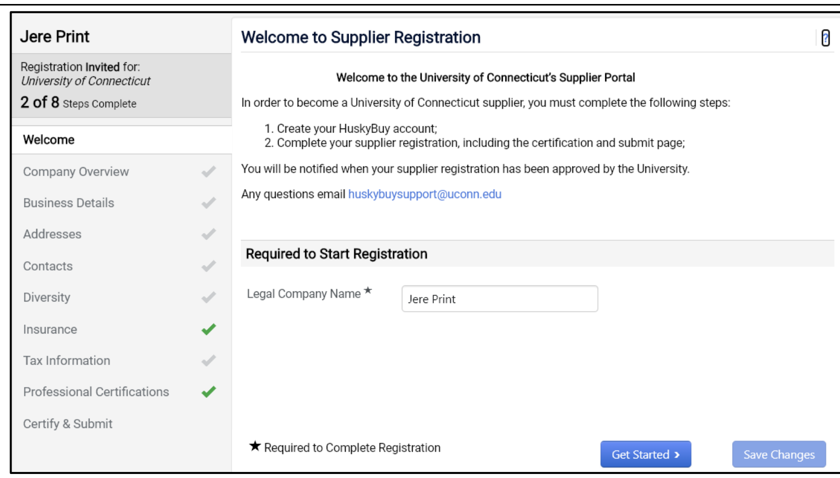
Tips for Supplier:
1. Subject Line: Supplier Invitation for University of Connecticut
2. Email From: University of Connecticut HuskyBuy huskybuysupport@uconn.edu</td><td>
</td></tr>
<tr><td>2</td><td>The first time in the Supplier Portal, the new supplier will be asked to create a new account.

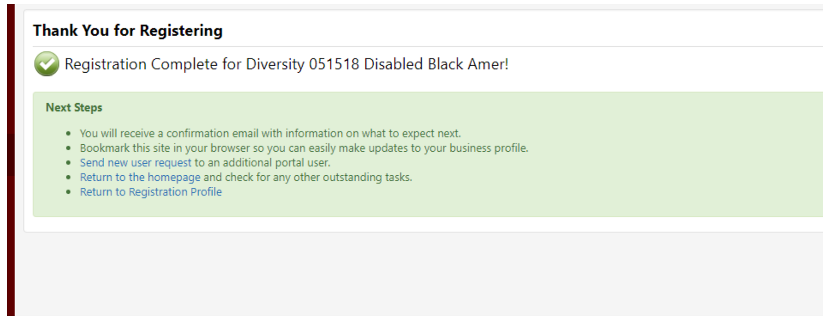
Click Continue With Registration to continue.

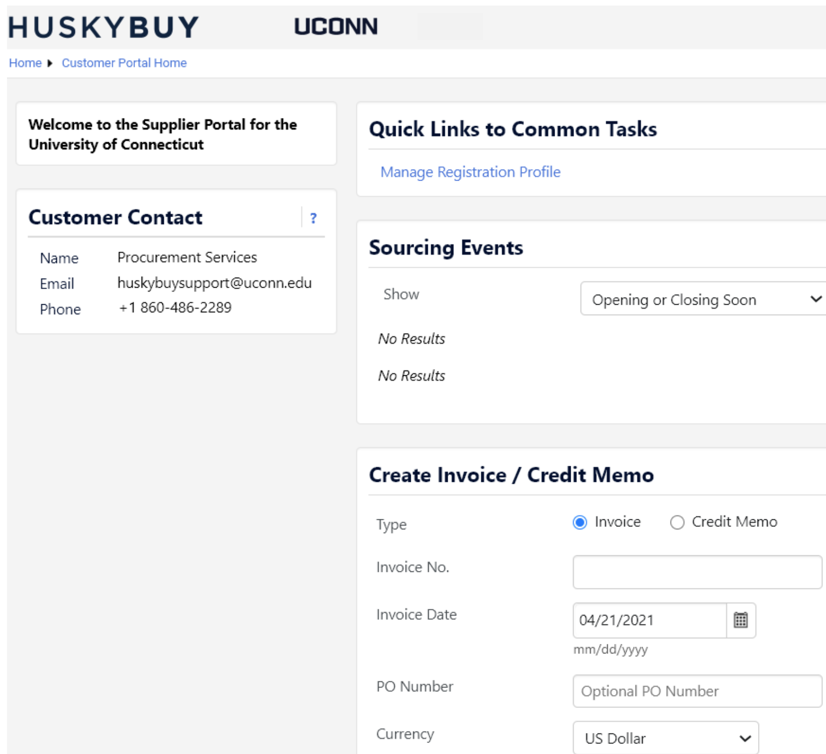
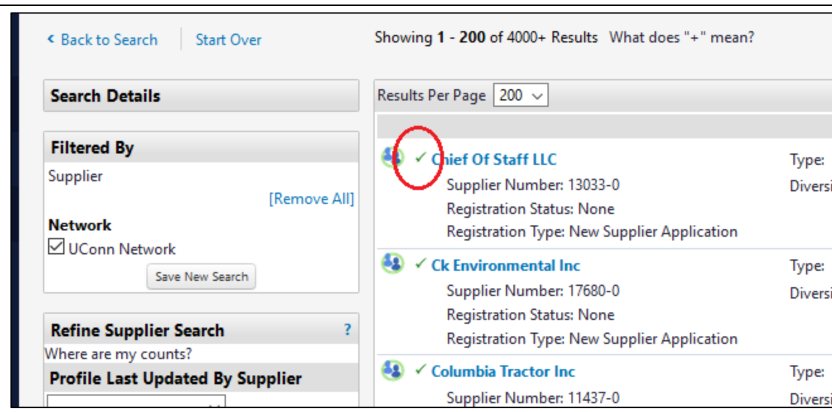
The Supplier will confirm their contact information, add a phone number, create a password and choose a security question.</td><td>
</td></tr>
<tr><td>3</td><td>After creating the account, They are then asked a series of questions.

The Star icon is used to note when a question is required to be answered.

★ Required to Complete Registration

The next section lists the questions that are asked for the different types of suppliers.</td><td>
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>4</td><td>After successfully submitting the registration, the supplier will receive confirmation that they have completed the registration.</td><td>
</td></tr>
<tr><td>5</td><td>The requesting UConn department will receive notification when the supplier has been approved for shopping.

Within the HuskyBuy Supplier Portal, the supplier has access to edit their profile, view sourcing events, create a portal invoice, or search for invoices.</td><td>
</td></tr>
<tr><td>6</td><td>Suppliers with a green checkmark next to their name are active for shopping.</td><td>
</td></tr>
<tr><td colspan="3">Supplier Application Questions (Individual/Sole Proprietor)</td></tr>
<tr><td colspan="3" align="right">Questions in blue italics are not required</td></tr>
<tr><td rowspan="2">1</td><td rowspan="2">Welcome</td><td>First Name</td></tr>
<tr><td>Last Name</td></tr>
<tr><td></td><td>Individual Overview</td><td>Country of Origin</td></tr>
</table>

Step	Action	Screenshot
2		Legal Structure
		Tax ID Number
		DBA – Doing Business As
		Are you a current “Connecticut State Employee,” an “Immediate Family Member” of a current “Connecticut State Employee,” or a “Business with which he is associated.”
		Are you a “Former UConn Employee” or will any “Former UConn Employee” be involved in providing services? (A “Former UConn Employee” is considered someone who was a UConn employee within the past 12 months)
		Do you meet the Preferential Standards of UConn’s Vendor Code of Conduct?
		Do you plan on providing services for the University?
3	Addresses	Fulfillment Address (Where POs should go)
		Remittance Address (Where payment goes)
4	Contacts	Remittance Contact
		Corporate Contact
5	Tax Information	W9
		W-8BEN
		W-8BEN-E
		W-8ECI
		W-8EXP
		W-8IMY
		8233
6	Professional Certifications	*Non Discrimination Certification*
		Form 1 Gift and Campaign Contribution Certification
7	Additional Required Tax Information - Foreign Individual	Are you providing a service to the University in which all or part of the service will be performed in the U.S.? (examples include: speaking engagements, theatrical, musical or artistic performances, academic research, art exhibitions)
		Are you selling a tangible product or good to the University (examples include: chemicals, supplies, equipment, pre-packaged software), and the sale includes installation, service or maintenance to be performed **in the U.S.** as part of the contract
		Will the University be paying you for the right to use, access, or reproduce an **intangible item** (such as copyrighted material, electronic information or an artistic work) that will be used **in the U.S.**?
		Are you receiving a scholarship or fellowship from the University for your own academic pursuits which are not conducted for or on behalf of the University and **all or part** of your scholarship/fellowship activities are conducted **in the U.S.**
		Are you receiving a cash award or prize from the University for activities previously conducted **inside the U.S.**?
		Is the University providing you a Stipend / Allowance for travel or other allowable expenses?

Step	Action	Screenshot
		Are you receiving rental income from UConn for the use of real or tangible property located or used **in the U.S.**?
		Did you answer **Yes** to any of these questions?
		Please provide a brief description of the reason you are requesting payment from the University.
8	Certify & Submit	Preparer's Initials
		Preparer's Name
		Preparer's Title
		Preparer's Email Address
		Today's Date
		Certification
Supplier Application Questions (Entities)		
		Questions in blue italics are not required
1	Welcome	Legal Company Name
2	Company Overview	*Doing Business As (DBA)*
		Country of Origin
		DUNS Number
		Legal Structure
		Tax ID Number
		Website
		Are you a foreign entity or organization that was incorporated or organized outside of the United States?
		Are you a current "Connecticut State Employee," an "Immediate Family Member" of a current "Connecticut State Employee," or a "Business with which he is associated."
		Are you a "Former UConn Employee" or will any "Former UConn Employee" be involved in providing services? (A "Former UConn Employee" is considered someone who was a UConn employee within the past 12 months)
		Do you meet the Preferential Standards of UConn's Vendor Code of Conduct?
		Do you plan on providing services for the University?
3	Business Details	Year Established
		Number of Employees
		Business Description
		Currency
		2017 Annual Revenue/Receipts
		2016 Annual Revenue/Receipts
		2015 Annual Revenue/Receipts
		Commodity Codes
		Will you be supplying construction services?
4	Addresses	Fulfillment Address (Where POs should go)
		Remittance Address (Where payment goes)

Step	Action	Screenshot
		Remittance Contact
5	Contacts	Corporate Contact
		Other Contact
		No Classification
6	Diversity	Federal Diversity Classification
		State Diversity Classification
7	Insurance	*Commercial Automobile Liability*
		Commercial General Liability
		Cyber Liability
		Professional Liability
		Umbrella Liability
		Workers' Compensation
		Other
8	Tax Information	W9
		W-8BEN
		W-8BEN-E
		W-8ECI
		W-8EXP
		W-8IMY
		8233
9	Professional Certifications	*Non Discrimination Certification*
		Form 1 Gift and Campaign Contribution Certification
10	Additional Required Tax Information - Foreign Entity	Are you providing a service to the University in which all or part of the service will be performed in the U.S.? (examples include: speaking engagements, theatrical, musical or artistic performances, academic research, art exhibitions)
		Are you selling a tangible product to the University which includes installation, service or maintenance to be performed in the U.S. as part of the terms of the sale? (examples include: chemicals, supplies, equipment, pre-packaged software)
		Will the University be paying you for the right to use, access, or reproduce an intangible item (such as copyrighted material, electronic information or an artistic work) that will be used in the U.S.?
		Are you receiving a scholarship or fellowship from the University for your own academic pursuits which are not conducted for or on behalf of the University and all or part of your scholarship/fellowship activities are conducted in the U.S.
		Are you receiving a cash award or prize from the University for activities previously conducted inside the U.S.?
		Is the University providing you a Stipend / Allowance for travel or other allowable expenses?
		Are you receiving rental income from UConn for the use of real or tangible property located or used in the U.S.?
		Please provide a brief description of the reason you are requesting payment from the University

Step	Action	Screenshot
11	Certify & Submit	Preparer's Initials
		Preparer's Name
		Preparer's Title
		Preparer's Email Address
		Today's Date
		Certification
Supplier Application Questions (Reimbursement/Refund)		
		Questions in blue italics are not required
1	Welcome	Legal Company Name
2	Company Overview	Country of Origin
		Legal Structure
3	Addresses	Fulfillment Address (Where POs should go)
		Remittance Address (Where payment goes)
4	Contacts	Remittance Contact
		Corporate Contact
5	Tax Information (only applicable for foreign suppliers)	W-8BEN
6	Certify & Submit	Preparer's Initials
		Preparer's Name
		Preparer's Title
		Preparer's Email Address
		Today's Date
		Certification

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HUSKYBUY UCONN

Requesting Suppliers

Support
(860) 486-2BUY (2289)
HuskyBuySupport@UConn.edu

Overview

Formerly called **vendors**, companies and individuals providing goods and services to the University are now call **suppliers**.

Suppliers can be invited to register and use the HuskyBuy Supplier Portal. This allows suppliers to log into the web-based portal and create invoices which are then "imported" into HuskyBuy.

Any supplier updates: address, name change, legal structure, etc. needs to be done by the supplier, who should log into the supplier portal.

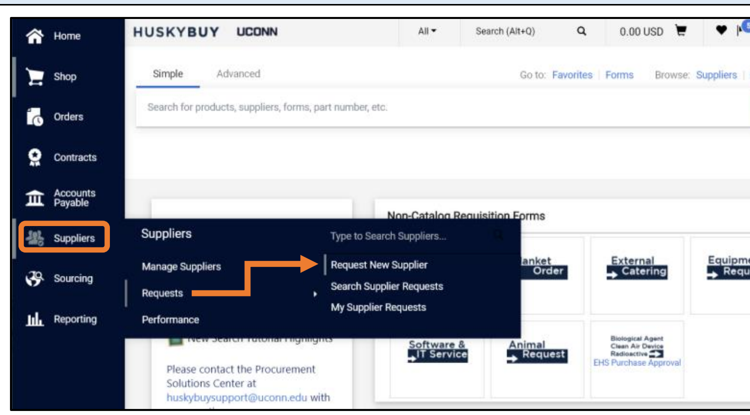
Related Job-Aids

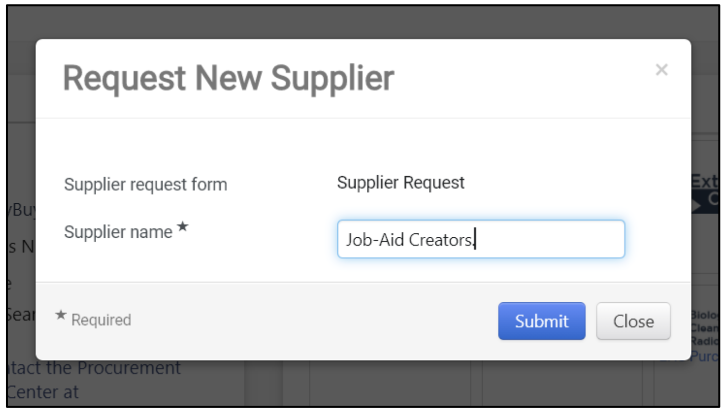
- Searching Suppliers
- Supplier Onboarding Process

Contents

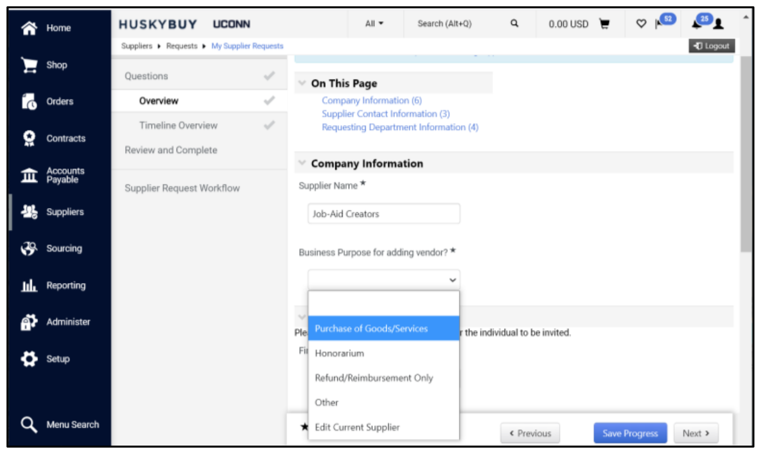
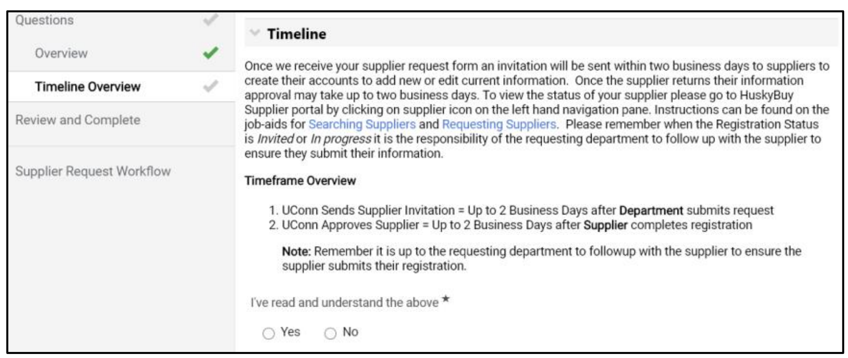
Included within this user-guide you will find:

Process Steps:

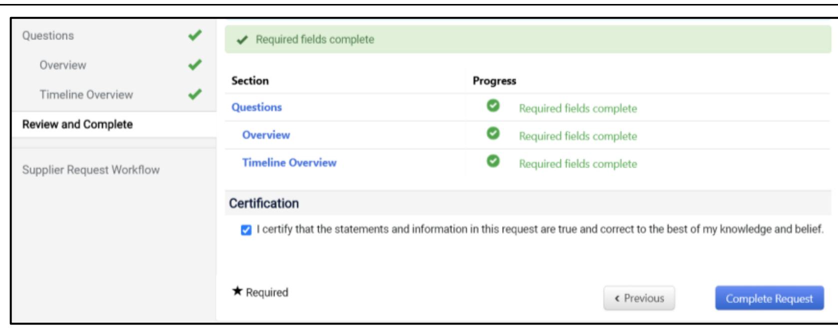
Step	Action	Screenshot
Requesting a New Supplier		
Before requesting a new supplier, you must conduct a search for that supplier to be absolutely sure that it does not already exist in the system. *(See the Searching Suppliers Job-Aid.)*		
1	To request a new supplier, after verifying that it does not already exist, navigate to **Suppliers > Requests > Request New Supplier**.	

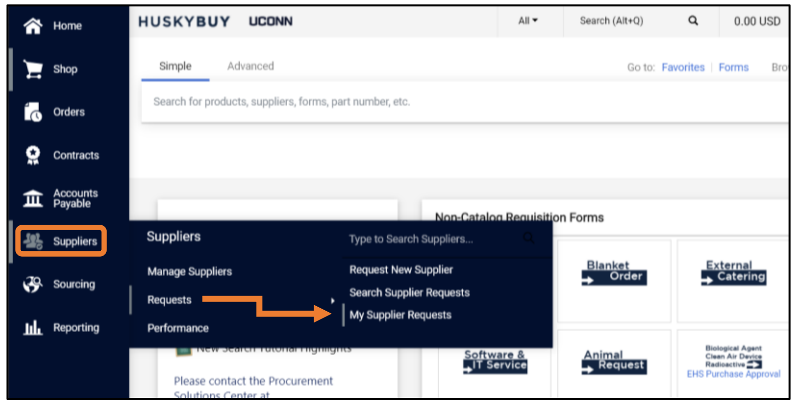
<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>2</td><td>Enter the supplier’s name, and click the Submit button.</td><td>
</td></tr>
<tr><td>3</td><td>Fill out all fields within the Company Overview. There are 3 sections:

Company Information: Select the business purpose for adding supplier.
Supplier Contact Information: Enter their name and email address.
Requesting Department Information: Enter your name, department, phone number, and email address.

Click Next when done.</td><td>
</td></tr>
<tr><td>4</td><td>Read the Timeline Overview and agree that you have read and understand the process.</td><td>
</td></tr>
<tr><td>5</td><td>Review the information, and then check the ☑ box to certify the information is correct.

Click Complete Request.

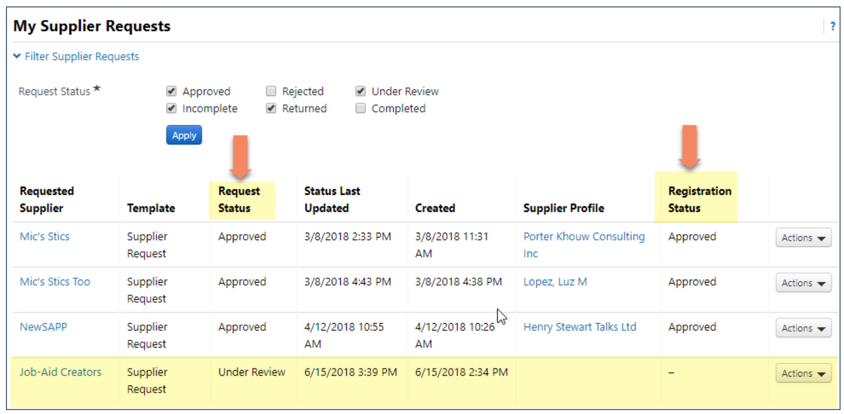
Supplier Management will now review and send an invitation to the supplier to access the portal and fill in missing information, as well as provide documentation as needed.</td><td>
</td></tr>
</table>

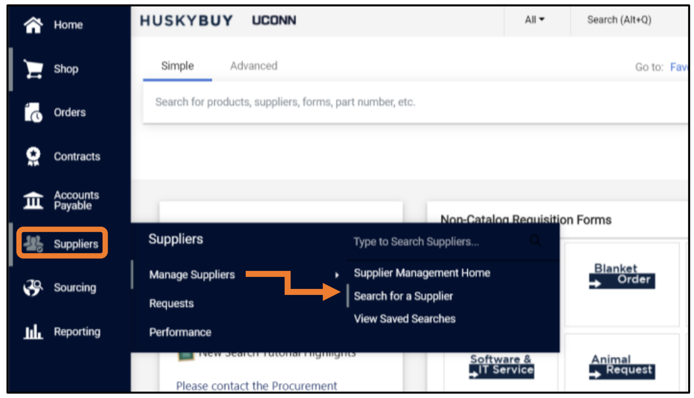
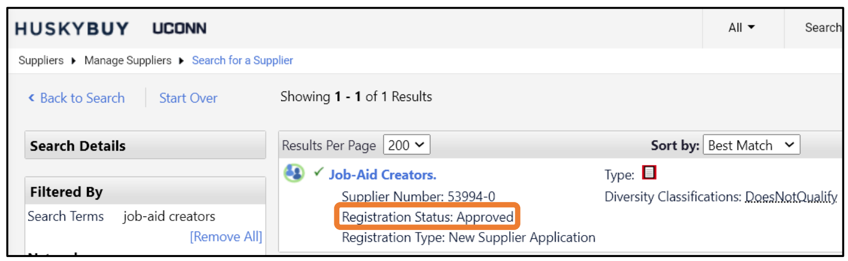
<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td colspan="3">View Pending Requests and Supplier Registration Status</td></tr>
<tr><td>1</td><td>To check the status of a request, navigate to Suppliers > Requests > My Supplier Requests.</td><td>
</td></tr>
<tr><td>2</td><td>From the Supplier Requests screen, you can view the status of the Request AND the Registration.

Request Status:

Approved – The request has been approved by supplier management.
Incomplete - The request has not been submitted to Supplier Management. (Registration status will show as none.)
Under review – The request is being reviewed by Supplier Management.
Returned (by workflow-can be edited and resubmitted)

Registration Status:

None – The invitation has not been sent to the supplier.
Invited – The invitation has been sent to the supplier
In Progress –
The supplier has started completing the application.
The application has been returned to the supplier.
Profile Complete – The supplier has submitted their application.
Approved – The application has been approved by Supplier Management.
Rejected – The application has been rejected by Supplier Management.
</td><td>
</td></tr>
</table>

Step	Action	Screenshot
Supplier Updates		
1	When an existing supplier has provided updated information, first verify if the supplier has a HuskyBuy account. Search for the supplier by selecting **Suppliers > Manage Suppliers > Search for a Supplier**.	
2	Verify the Registration Status. • If the status shows **None**, submit a supplier request form. • If the status shows **Approved**, **Invited**, **In Progress**, or **Profile Complete**, contact the supplier to update the information using their existing HuskyBuy account.	

HUSKYBUY UCONN

Supplier Classifications

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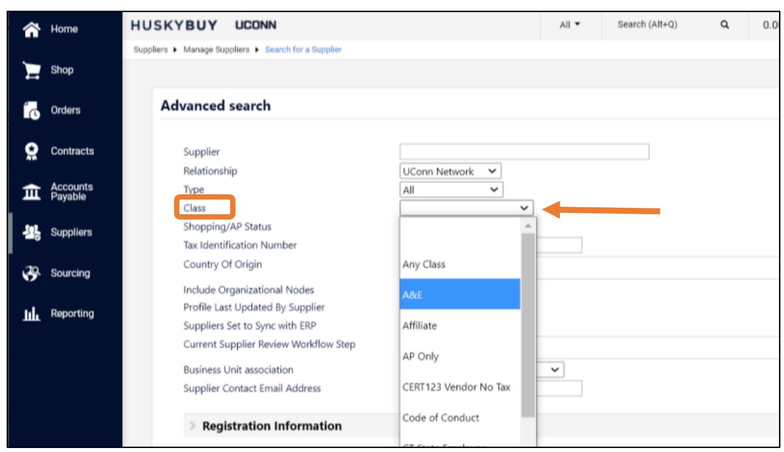
(860) 486-2BUY (2289)
HuskyBuySupport@UConn.edu

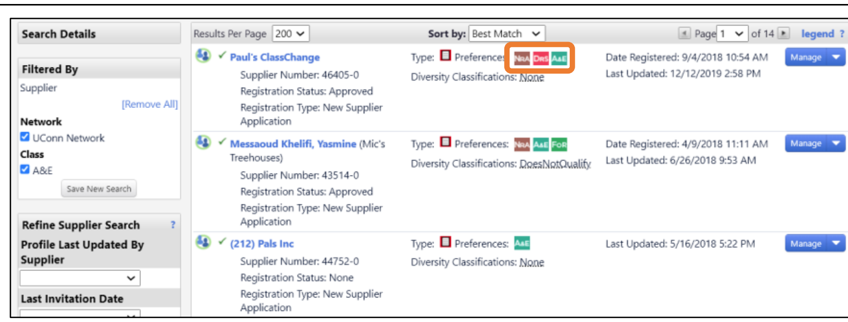
Overview This user-guide will assist you with understanding supplier classifications.

Supplier classifications are used to identify suppliers that meet specific criteria, i.e. reimbursement only, A&E tax applicable, NRA, DRS, etc. Supplier classifications replace the vendor hold codes in KFS, and suppliers can be assigned to multiple supplier classifications.

Contents Included within this user-guide you will find:

Process Steps:

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td colspan="3">Using the Supplier Classification in a Search</td></tr>
<tr><td>1</td><td>When you search for the supplier, by selecting Suppliers > Manage Suppliers > Search for a Supplier, and use Advanced search, you can choose a supplier class in the search criteria.</td><td>
</td></tr>
<tr><td>2</td><td>The search results will also show the supplier classifications that have been assigned.

As stated above, suppliers can be assigned to multiple supplier classifications.</td><td>
</td></tr>
</table>

Step	Action	Screenshot
Supplier Classifications		
The table below lists all of the supplier classifications in priority order and the action required.		

Order	Supplier Classification	Department Action Required	Accounts Payable Action Required
1	DRS **DRS** (Department of Revenue Services)	Supplier owes taxes to the Department of Revenue Services. DVs and PREQs should be created to pay the DRS division/fulfillment center.	Supplier owes taxes to the Department of Revenue Services. DVs and PREQs should be created to pay the DRS division/fulfillment center. Will route to Levy group.
2	NRA **NRA** (Non Resident Alien)	No action required.	Alerts AP at time of invoice creation. AP is responsible for checking the Tax Review box to route to the Tax Office.
3	A&E **A&E** (CT Athletic & Entertainment Tax)	May need to take 6.99% tax if performance/game official over $1,000.00 or Speaker/Lecturer over $5,000.00 and residing outside of CT.	May need to take 6.99% tax if performance/game official over $1,000.00 or Speaker/Lecturer over $5,000.00 and residing outside of CT. Alerts AP at time of invoice creation. AP responsible for checking the Tax Review box to route to Tax Office.
4	REI **REI** (Reimbursement Only)	Do not pay these suppliers for services. If the supplier is to be paid for services, additional documentation is required. Prior to submitting payment, submit a supplier request form to Supplier Management.	Supplier is approved only for reimbursement/refund payments. For DVs, will route to supplier management based on object code. Purchase requisitions will automatically route to Supplier Management.
5	AFL **AFL** (Affiliate)	Prior to payment, contact Procurement to perform an open and public bid.	Verify that the open and public bid process was completed. If not, payment cannot be approved. Documents will route to Procurement.
6	SPS **SPS** (Special Projects)	A High Risk Supplier.	No action required.
7	FOR **FOR** (Foreign Source)	Ensure the services occurred outside the US. If services occurred in the US, payment cannot be made until additional documentation is received. Submit a new supplier request form to Supplier Management.	Ensure the services occurred outside the US. If services occurred in the US, payment cannot be made until additional documentation is received. Submit a new supplier request form to Supplier Management.
8	ROY **ROY** (Royalties)	State employees can be paid royalties. If other than royalties, prior to payment, contact Procurement to perform an open and public bid.	State employees can be paid royalties. If payment is other than royalties, verify that an open and public bid was performed.
9	CSE **CSE** (CT State Employee)	If payment is other than a refund/reimbursement, prior to payment, contact procurement to perform an open and public bid.	If payment is other than a refund/reimbursement, verify that the open and public bid process was completed. If not, payment cannot be approved. Documents will route to Procurement.

Order	Supplier Classification	Department Action Required	Accounts Payable Action Required
10	FUE **FUE** (Former UConn Employee)	If payment is other than a refund/reimbursement, prior to payment, contact procurement to perform an open and public bid.	If payment is other than a refund/reimbursement, verify that the open and public bid process was completed. If not, payment cannot be approved. Documents will route to Procurement.
11	IND **IND** (Individual/Sole Proprietor)	No action required.	No action required.
12	AP **AP** (AP Only)	No action required.	Flag for Accounts Payable review.
13	DBR **DBR** (Debarred Supplier)	System managed as pertains to federal accounts and SPS CG groups, no action required.	System managed as pertains to federal accounts and SPS CG groups, no action required.
14	NON **NON** (Non-Taxable)	This applies only to restaurants, hotels, and caterers in the state of CT. Do not pay any additional taxes, if billed.	This applies only to restaurants, hotels, and caterers in the state of CT. Do not pay any additional taxes, if billed.
15	COC **COC** (Code of Conduct)	No action required.	No action required.
16	NEC **NEC** (NEC 1099)		
17	STU **STU** (UConn Student)		
18	VPA **VPA** (VPayables)		
19	UCH **UCH** (UConn Health)		

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