

HUSKYBUY

Beginners Guide to HuskyBuy

October 17, 2022

Topics for Today's Discussion:

Support

Profile Setup

Notifications

Roles

Supplier Onboarding Process

Shop to Pay Process

- Shopping Cart

- Requisition

- Purchase Order

- Receipt

- Invoice

Quantity vs Non-Quantity

Purchase Order Revision/Amendments POA

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Support

We have several areas where you can either help yourself or reach out to us for assistance.

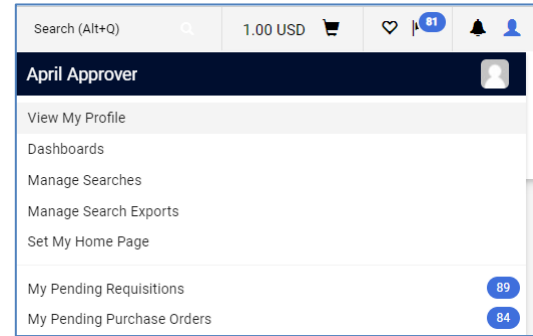
- Purchasing Website <https://purchasing.ubs.uconn.edu/>
 - NewsFlash
 - Resources Tab
- Training Job-Aids <https://purchasing.ubs.uconn.edu/huskybuy/>
- HuskyBuy Shopping Home Page
 - Message Board
- huskybuysupport@uconn.edu
- Schedule Microsoft Teams Calls
- (860) 486-2BUY (2289)
- Center of Excellence (COE)
 - Sean Martin, Supplier Coordinator and Support
 - Jeremiah Macht, System Administrator and Support
- Accounts Payable (AP)
 - Invoice and Receiving Support apinquiries@uconn.edu

Profile Setup

Your profile is where you can customize specific information to set as default, which will make completing requisitions more efficient. This information includes:

- Default Shipping Address
- Default Account Codes

[Profile Preferences](#)

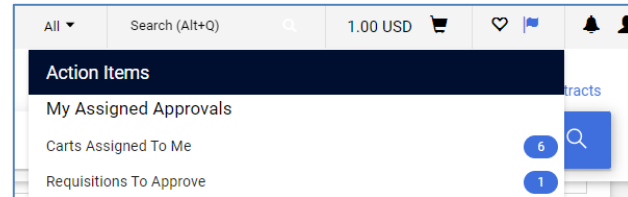
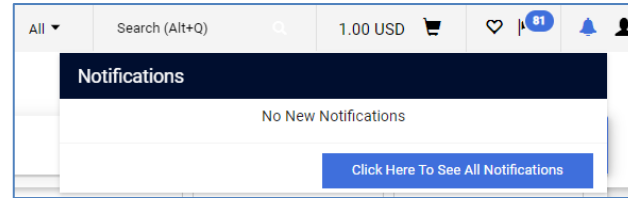


Notifications

Within your profile, you can setup specific notifications for specific tasks. We have setup default notifications based on the role you have been given. Notifications are delivered in two ways, email and the notification bell icon on the top right of the main banner of every page in HuskyBuy. You can change that preference to one or the other or none at all if that task does not apply to you. Common notifications include:

- Cart Assigned Notice
- Cart/PR rejected/returned
- PR pending Workflow approval
- PO pending Workflow approval
- Invoice pending Workflow approval
- Invoice Requires Receipt notice
- Invoice returned
- Supplier is approved in Workflow

[Notification Preferences](#)



Roles

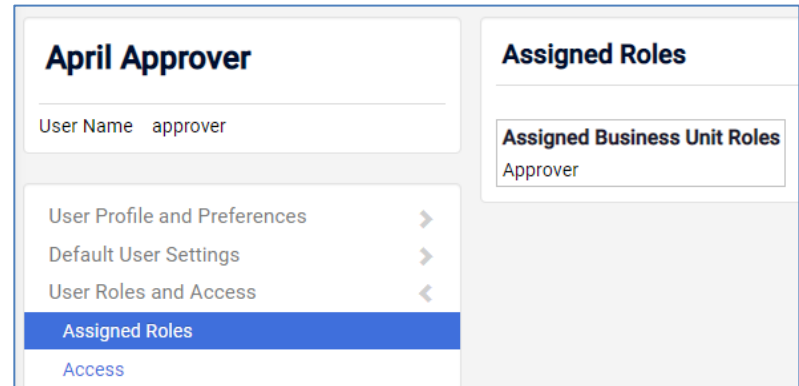
There are 3 main roles for users within your department.

- 1. 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.
- 2. 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.
- 3. 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. Department Fiscal Officer’s (FO) or their Delegates will be assigned the role of Approver.

Roles

- Kual Financial System (KFS) and HuskyBuy access to use HuskyBuy.
- Your role is created in and integrates or flows over to HuskyBuy.
- [Enterprise Financials System Access Request.](#)

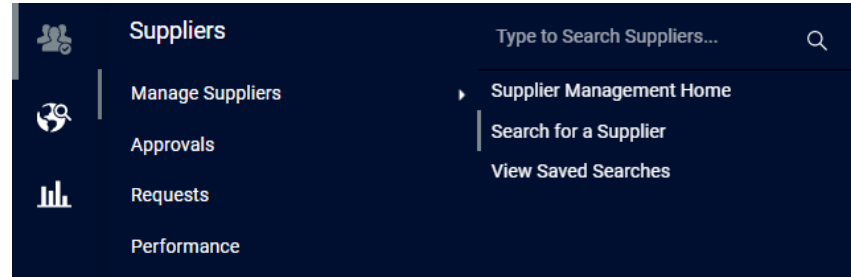
[System Definitions | User Roles and Definitions](#)







The screenshot displays a user profile interface for 'April Approver'. The user name is 'approver'. A navigation menu on the left includes 'User Profile and Preferences', 'Default User Settings', 'User Roles and Access', 'Assigned Roles' (highlighted), and 'Access'. The 'Assigned Roles' section on the right shows 'Assigned Business Unit Roles' with 'Approver' listed below it.

Supplier Onboarding Process

- Supplier Search
- Request New Supplier
- Supplier Invitation
- Supplier Registration
- Approvals
 - HuskyBuy Team
 - Supplier Diversity
 - Tax/Foreign Team
- Supplier Updates

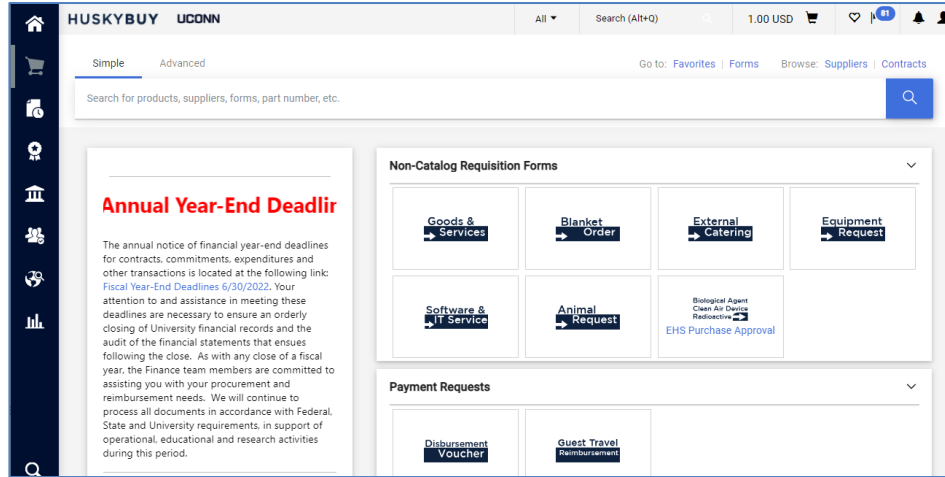


Reference:

-  New Supplier Request
-  Temporary Ship-to-Home Address
-  Liquid Helium Shortage
-  N95 Purchase Requests - Required Protocol

[Supplier Onboarding Process](#) | [Request New Supplier](#)

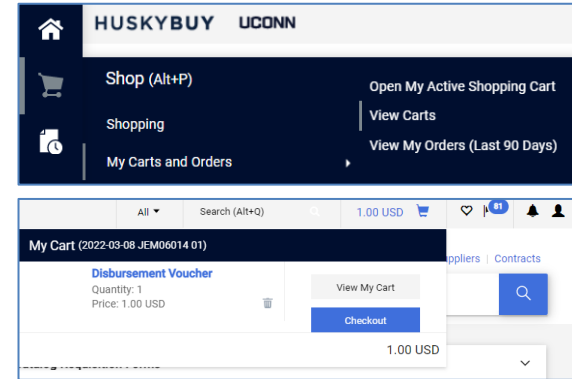
Procure to Pay Process



Shopping Cart

Your shopping cart is also known as your draft requisition. Items to add to your **Shopping Cart** include:

- **Non Catalog Forms**
 - Blanket Order
 - EHS Purchase Approval
- **Non Catalog Form Requests**
 - Goods & Services
 - External Catering
 - Equipment Request
 - Software & IT Service
- **Catalog punchout items**
 - Airgas
 - Dell
 - Fastenal
 - WB Mason
- **Payment Request**
 - Disbursement Voucher
 - Guest Travel Request



Note: If adding multiple of these items, they all need to be all from the same supplier. You can only add multiple of the same item type. For example, you cannot add a **Catalog item** to a shopping cart that already contains a **Form Request**. Once you have completed adding items to your **Shopping Cart** proceed to **Checkout** to move it to a **Requisition**.

[Assigning/Unassigning Carts](#) | [Assigned Shopping Carts](#) | [Draft Requisitions](#) | [Cart Management](#)
[Disbursement Voucher](#) | [Catalog Shopping](#) | [Non-Catalog Forms](#) | [Blanket Order Forms](#)

Requisition

Complete the required and optional fields prior to placing your order. You can also review the workflow approvers in the status sidebar under the **What's Next?** section. Once all approvals have been completed the requisition will turn into a purchase order.

Examples of required fields include:

- KFS Accounting Codes
- Commodity Codes
- Shipping Address

Examples of optional fields include:

- Contracts
- Optional Requisition (PR) and Invoice Approvers
- Notes and Attachments

If you need to make changes to information on your form such as quantity or amount, make your change by clicking on the form name link on the line you need to change. Make your change, click save and be sure to click the “Return to Requisition” link in the top left of the form.

Note: The Cart Management Screen is an often overlooked feature that can really assist you in managing your requisitions. Especially when a requisition gets returned. If you are unsure why your requisition was returned, view the History tab and view the Notes column.

[Draft Requisitions](#) | [Assigned Shopping Carts](#)

Purchase Order

After all approvals have been completed on a requisition, it will convert to a Purchase Order which will be automatically sent electronically to the supplier's fulfillment email contact on file. You also have the option to revise or amend a PO which will go through similar approval steps as the requisition did.

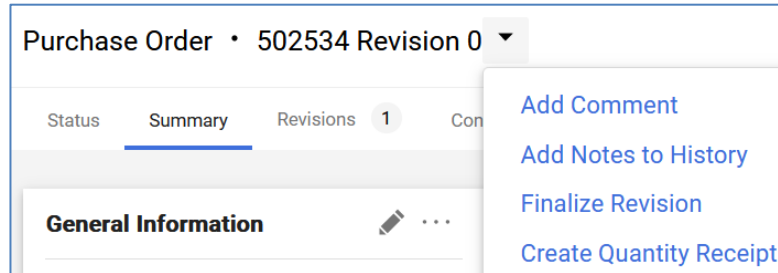
Note: Most Purchase orders will typically close automatically once the order is paid in full.

[Draft Requisitions](#) | [Assigned Shopping Carts](#)

Receipt

- Quantity receipt for recordkeeping purposes.
- This is REQUIRED on all quantity PO's over \$5000 along with some orders with specific commodity codes.
- Necessary to complete before approving the invoice.

[Creating a Quantity Receipt](#)



Invoice

- Payments will go against the purchase order.
- Must match the amount requested.
- If a receipt is owed on the PO, the invoice must be 3 way matched (Purchase Order, Invoice, Receipt).
- E-Invoicing
 - Most catalog suppliers have the ability to send invoices through the system.
- Non catalog suppliers should send invoices to apinvoices@uconn.edu referencing the PO.

[Approving Supplier PO Invoice](#)

Quantity vs Non Quantity

- Quantity orders have at least one item and you expect one invoice.
- Non-Quantity allows for multiple payments
- Blanket Orders are considered non quantity and there is no need to select non quantity on the requisition.

Note: Don't change an order from quantity to non-quantity after an invoice has already been paid on any line.

Non-Quantity PO



Non-Quantity PO



Invoice Qty/Cost	Status
1 / 35,464.00 USD	Open
1 / 32,339.00 USD	Net Invoiced

[Quantity vs. Non-Quantity](#)

Purchase Order Revision/Amendment (POA)

At times you will need to make changes to your purchase order after workflow approvals have been completed. Examples could include:

- Increase quantity because you need more items
- Increase price to pay invoice

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Shop ▶ Shopping ▶ [View Forms](#)

[◀ Back to Purchase Order](#)

Non-Catalog Goods & Se...

Form Number	6558528
Purpose	Procurement Request
Status	On Document

Purchase Order • 502534 Revision 0 ▾

Status Summary Revisions **1** Con

General Information ✎ ...

- [Add Comment](#)
- [Add Notes to History](#)
- [Finalize Revision](#)

Purchase Order Revision/Amendment (POA) Notes

Note: Invoice Status When making changes, make sure you review the status and invoice pages. Note which lines have payments as that could affect if the revision will complete. If there is a payment on a line, make sure the amount on the line equals what was invoiced.

Note: Expired Accounts 4 or 5 ledger accounts typically have expiration dates. You cannot make a revision on a line that has an expired account unless you are able to extend the account prior to making your change.

Note: Cancelling Lines The system will not allow you to remove or cancel a line on a Purchase Order. You can amend the line you would like to “cancel” by lowering the dollar amount to zero and keeping a quantity of 1. You should also change the description to something like “Cancelling This Line”.

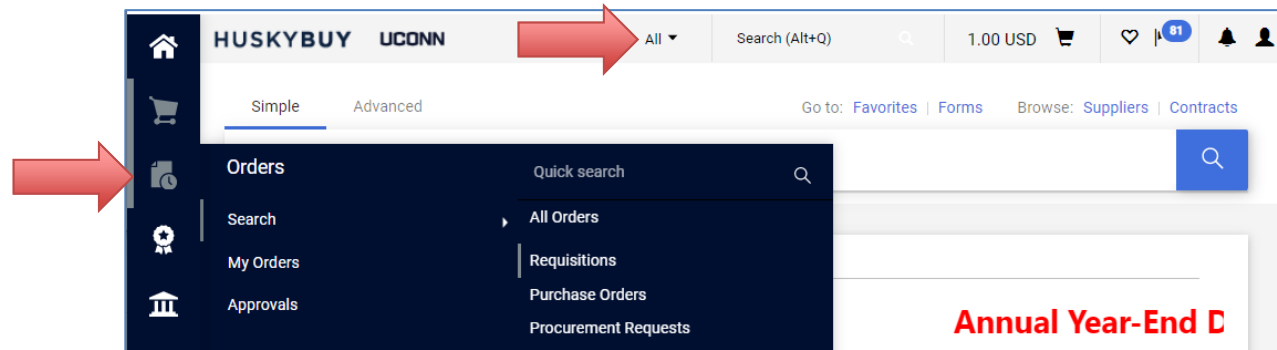
[Purchase Order Amendments/Revisions](#)

Search Documents

You can search for documents such as requisitions, purchase orders, invoices, receipts and procurement requests. You can also use filters to narrow down your search results.

Document visibility is based off your department org access and your participation within the document.

[Documents](#)



Questions, comments and feedback.... What can we do better?

[Home | Purchasing Department \(uconn.edu\)](#)