

HUSKYBUY

Intermediate Guide to HuskyBuy

Procurement | Center of Excellence

Technology Day

June 3, 2025

HUSKYBUY

Topics for Today's Discussion:

- Non-Catalog vs. Catalog Shopping
- Add Multiple Non-Catalog Forms to the Same Shopping Cart
- Purchase Order Revision/Amendments POA
Close PO
- Search Features
- Supplier Onboarding Process
- Reimbursements vs Refunds: Who, Where, Why?
- Support & Communication
- Questions/Comments
- Open Lab

Non-Catalog vs. Catalog Shopping

Catalog Shopping

<https://kb.uconn.edu/space/FPB/26817364002/Catalog+Shopping>

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

- Punchout Examples include Airgas, Fisher Scientific, Dell, Staples.
- Hosted Examples include C&C Janitorial, Chemglass.

Non-Catalog vs. Catalog Order 2 of 4

Punchout Catalog

These are private websites developed by the Catalog supplier using only UConn's precontracted pricing and content. You shop within the site just like you would using the supplier's commercial public website.

After adding items to the punchout site's shopping cart, you submit or return that cart back into your HuskyBuy shopping cart. From there you continue with your draft requisition.

Note: Make sure your HuskyBuy shopping cart is empty prior to adding catalog items to your cart.

Non-Catalog vs. Catalog Order 3 of 4

Non-Catalog Shopping

<https://kb.uconn.edu/space/FPB/26819952664/Non-Catalog+Shopping>

Examples include:

- **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.
- **Equipment Request:** Use this form for any equipment purchases. (Not to be used for A/V equipment).
- **Software and IT Services:** Use 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:** Use for making EH&S purchases.

Non-Catalog vs. Catalog Order 4 of 4

Sourcing

Sourcing refers to the process of identifying, evaluating, and selecting suppliers or vendors to provide the goods, services, or raw materials needed for the university's operations. It's a crucial part of procurement and involves finding the most suitable suppliers based on factors like cost, quality, availability, and long-term strategic fit.

Note: Catalog ordering are automatically considered sourced by a contract whereas Non-catalog items may be sourced from a variety of avenues. Such as quotes, contracts, sole sourced as well as how the items are funded, thru sponsored programs or federally funded.

▼ Sourcing

Is this purchase Sponsored Programs/Federally Funded? * ?

Yes
 No
 I Don't Know

Please Select the Sourcing Dollar Threshold * ?

This Purchase is Under \$25,000
 This Purchase is Under Contract
 This Purchase is a Sole Source
 This Purchase is Between \$25,000 and \$100,000 and NOT a Sole Source
 This Purchase is Over \$100,000 and NOT a Sole Source
 This Purchase is Over \$25,000 and Included in GL-71
 Sponsored Programs/Federally Funded AND Under \$25,000
 Sponsored Programs/Federally Funded AND Under Contract
 Sponsored Programs/Federally Funded AND is a Sole Source
 Sponsored Programs/Federally Funded AND is Between \$25,000 and \$250,000 AND NOT a Sole Source
 Sponsored Programs/Federally Funded AND is Over \$250,000 and NOT a Sole Source

Quote Upload

No File Attached

Add Multiple Non-Catalog Forms to the Same Shopping Cart

Make sure you use the same form type.

- **Type: Non Catalog Forms**
 - Blanket Order
 - EHS Purchase Approval
- **Type: Non Catalog Form Requests**
 - Goods & Services
 - External Catering
 - Equipment Request
 - Software & IT Service

The screenshot displays the HuskyBuy UCConn interface. At the top, the header includes the logo, search bar, and user account information. A navigation sidebar on the left contains icons for home, shopping cart, and various requisition types. The main content area features a search bar with a dropdown menu set to 'Simple'. Below the search bar, a message states: 'If you do not find your product via this search, please review our punch-out catalog offerings or contact supplier for a quote as necessary and submit via a non-catalog form'. A red arrow points from this message to the 'Non-Catalog Requisition Forms' section. This section contains a grid of buttons for 'Goods & Services', 'Blanket Order', 'External Catering', 'Equipment Request', 'Software & IT Service', and 'Animal Request'. Below this grid is a section for 'Payment Requests' with buttons for 'Disbursement Voucher' and 'Guest Travel Reimbursement'. On the left side of the main content area, there is a large red heading 'Annual Year-End Deadlines an' followed by a paragraph of text regarding financial year-end deadlines and a link to 'Fiscal Year-End Deadlines 6/30/2022'. Below this, another paragraph mentions that HuskyBuy is now ready for submission of new requisitions and blanket PO requests for FY23.

Add Multiple Non-Catalog Forms to the Same Shopping Cart 2 of 6

The screenshot displays the HuskyBuy UConn website interface. At the top, the navigation bar includes the HuskyBuy UConn logo, a dropdown menu set to 'All', a search bar with the text 'Search (Alt+Q)', and a shopping cart icon showing a total of '100.00 USD'. A dark blue cart overlay is open, titled 'My Cart (2024-10-01 approver 03)'. Inside the cart, a single item is listed: 'Non-Catalog Goods & Services' with a quantity of 1 and a price of 100.00 USD. A red arrow points to the item name, and another red arrow points to the '100.00 USD' total in the top right. Below the item, there is a 'View My Cart' button and a blue 'Checkout' button. The main content area below the cart shows a search bar with the text 'If you do not find your product via this search, please review our punch-out catalog of...' and a section titled 'Non-Catalog Requisition Forms'.

Add Multiple Non-Catalog Forms to the Same Shopping Cart 3 of 6

The screenshot shows a shopping cart page for 'Mansfield Supply Inc' with 100 items totaling 100.00 USD. The page includes a header with 'HUSKYBUY UCONN', a search bar, and a 'Proceed To Review' button. A table lists items with columns for Line, Item, Catalog No., Size/Packaging, Unit Price, Quantity, and Ext. Price. The first item is 'Non-Catalog Goods & Services' with a quantity of 100 and an extended price of 100.00. A context menu is open over the item, showing options: 'Remove', 'Add to Favorites', 'Move to Another Cart', and 'Add to PO Revision'. A red arrow points to the item name, and another red arrow points to the context menu. Below the table, there are sections for 'ITEM DETAILS' with fields for Contract, Template Title, and Purpose. A 'Commodity Code' field is also visible with a search icon and a 'Required' label.

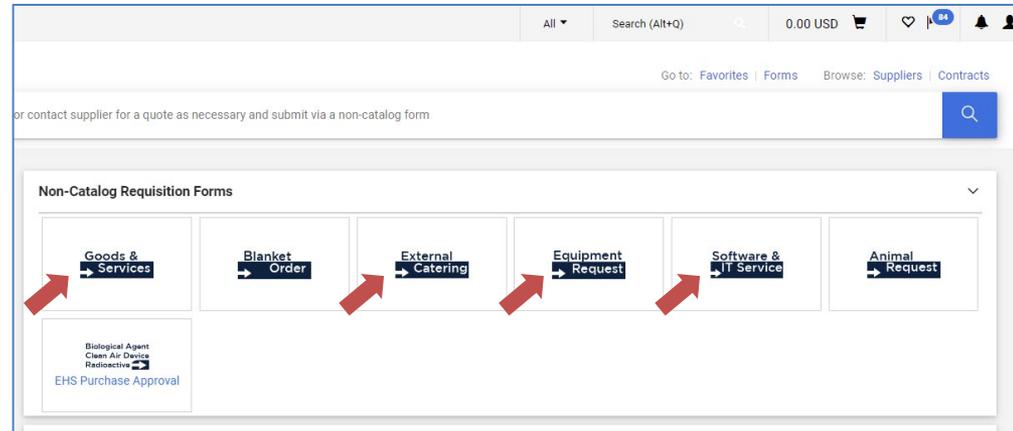
Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	Supplies		EA	1.00	Qty: 100	100.00

Add Multiple Non-Catalog Forms to the Same Shopping Cart 4 of 6

Now, because we used a Goods & Services form request, we are limited to these options to add to your cart.

Non-Catalog Form Requests

- Goods & Services
- External Catering
- Equipment Request
- Software & IT Service



Add Multiple Non-Catalog Forms to the Same Shopping Cart 5 of 6

Once you have completed your second form, you can either Add and Go to Cart or choose another option from the drop-down menu.

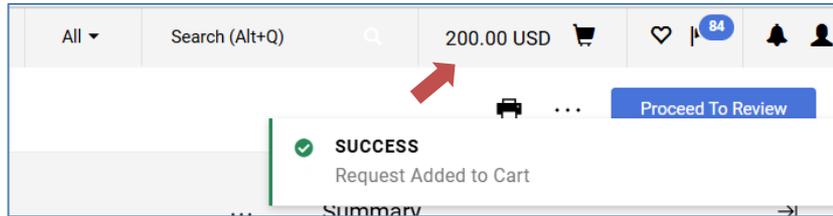
The screenshot displays the 'Review and Submit' interface for a 'Non-Catalog Goods & Services' form. The form number is 1007515, and the purpose is 'Procurement Request On Document'. A progress table shows that 'Suppliers' and 'Form Fields' are complete. A red arrow points to the 'Add and go to Cart' button, which has a dropdown menu open with the following options:

Section	Progress
Suppliers	✓ Required Fields Complete
Form Fields	✓ Required Fields Complete

Buttons: < Previous, Add to Favorites, Add and go to Cart (dropdown), Add and go to Cart, Save to Cart and Add Another, Add to new Cart, Add to PO Revision

Add Multiple Non-Catalog Forms to the Same Shopping Cart 6 of 6

Notice your cart total increased with 2 form requests in your shopping cart. From here, you will proceed as normal.



A screenshot of a shopping cart item details page. The header shows '2 Items' and 'Mansfield Supply Inc · 200 Items · 200.00 USD'. Below the header, there is a 'SUPPLIER DETAILS' section for 'Storrs Mansfield Fulfillment Center'. The main table lists two items, both of which are 'Non-Catalog Goods & Services'. Red arrows point to the 'Item' column header and the 'Non-Catalog Goods & Services' text for the first item.

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	Supplies		EA	1.00	Qty: 100	100.00
2	Supplies		EA	1.00	Qty: 100	100.00

Summary Sidebar

This screenshot shows a 'Summary' sidebar with a purple header labeled 'Draft'. A red error message box is overlaid on the sidebar, containing the text: 'Correct these issues. You are unable to proceed until addressed.' Below the error message, the text 'Required: Object Code' is displayed in blue. The sidebar content includes: 'Required: Object Code', 'Be aware of these issues. You may review at', 'Empty: Optional', 'Total (3.00 USD)', 'What's next for my order', 'Next Step: Wait for ERP Validation', 'Approvers: There are no approvers', 'Workflow: Show skipped steps (toggle off)', 'Draft: Active, Jeremiah Macht', 'Start - Parallel Steps', and 'Send ERP Validation Request: Future'.

This screenshot shows a 'Summary' sidebar with a vertical workflow diagram. The steps in the workflow are: 'FO Approval: Future', 'EHS Form Approval: Future', 'EHS Notification: Future', 'Procurement Approval 2: Future', 'Start - Parallel Steps', 'Send ERP Validation Request: Future', 'Wait for ERP Validation: Future', 'End - Parallel Steps', 'Create PO: Future', and 'Finish: Future'. A callout box is overlaid on the 'Procurement Approval 2' step, containing the text: 'Procurement Approval 2: Future', 'Facilities Team - Level 2', 'Kathleen Susca, huskybuy@uconn.edu', and 'Shamona Kamm, huskybuy@uconn.edu'.

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

Status	Item
	Non-Catalog Goods & Services
Contract:	UC-KA030421-8
1	 Program Fees for Fall 2023 University of Granada programs Procurement Request: Non-Catalog Goods & Services

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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 • [University of Granada](#) • 523495 Revision 0

[Status](#) [Summary](#) [Revisions](#) **1** [Confirmations](#) [Shipments](#) [Receipts](#) [Invoicing](#)

[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”.

[https://kb.uconn.edu/space/FPB/26904199221/Purchase+Order+Amendments+\(POAs\)](https://kb.uconn.edu/space/FPB/26904199221/Purchase+Order+Amendments+(POAs))

Closing Purchase Orders

When your PO has been fully paid or no longer needed, you have the ability to close your Purchase Order. There are a couple different ways PO's can close.

Automatic Close

- This happens when the PO has been paid in full or Fully Matched
 - Unless the PO is marked for Non-Quantity.
 - Unless the PO was closed and then reopened. A manual close will need to be done in this case.

Manual Close

- One PO at a time
- Multiple PO's at a time

<https://kb.uconn.edu/space/FPB/26977763350/Closing+Purchase+Orders>

Search Features

Document Search Features

<https://kb.uconn.edu/space/FPB/26923073632/Document+Searches>

- Add/Remove/Pin Filters
- Add/Remove/Pin Columns
- Quick Filters

Save Search Features

<https://kb.uconn.edu/space/FPB/26976682048/Schedule+a+Saved+Search>

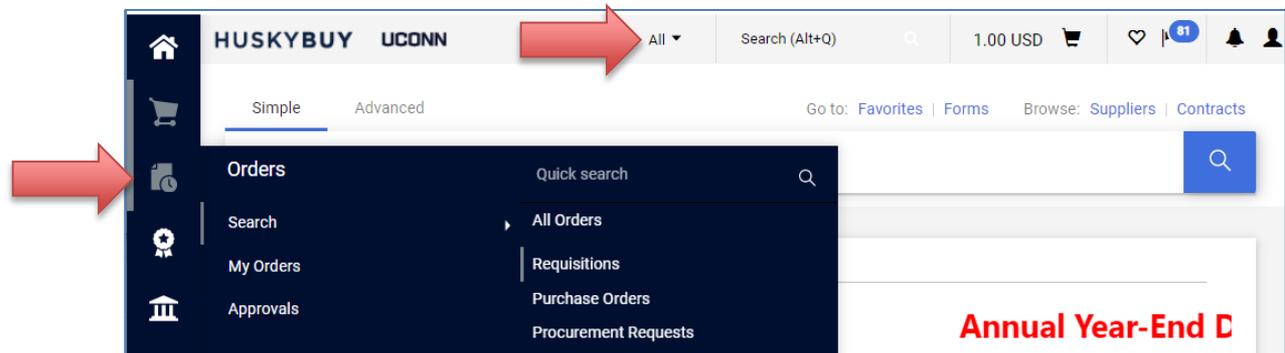
- Save As
- My Searches
- Manage Searches Favorite Searches
- Export/Scheduled Export

Note: You only have access to documents related to your department/org or your involvement. i.e. submission or approval.

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.



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

Reimbursements vs Refunds: Who, Where, Why?

Have you ever wanted to reimburse travel expenses for a speaker at a seminar you put on? Or have you ever needed to refund a ticket holder for an event that was cancelled? You may have logged into HuskyBuy and thought, “Wait... do I reimburse or provide a refund using HuskyBuy or Concur?” Procurement and Accounts Payable would like to help you by clarifying any confusion between reimbursements and refunds you may have. We also want to take this opportunity to inform you with whom and when you should provide reimbursements and refunds.

With the help of UConn Travel, Accounts Payable, Procurement’s Center of Excellence has put together this guide to help you determine your best avenue to reimburse or refund appropriately.

[Refund vs Reimbursement Guide](#)

Support & Communication

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

- Purchasing Website <https://purchasing.procurement.uconn.edu>
 - NewsFlash
 - Resources Tab
 - Training Knowledgebase <https://kb.uconn.edu/space/FPB/26666663970/HuskyBuy>
 - HuskyBuy BROADCAST Email Communications
- HuskyBuy Application
 - Shopping Home Page - Message Board
 - Document Comments & History
- huskybuysupport@uconn.edu
- Schedule Microsoft Teams Calls
- (860) 486-2BUY (2289) Option 1
- Center of Excellence (COE)
 - David Denuzzio, Associate Director COE
 - Sean Martin, Supplier Coordinator and Support
 - Jeremiah Macht, System Administrator and Support
 - Thomas DeVito, System Support

Support & Communication Continued

HuskyBuy and other related areas of contact:

Huskybuysupport@uconn.edu – You can also use this inbox for any general questions related to an existing purchase order or to ask questions on the purchase order process. For question on the supplier registration process or questions related to a supplier portal account including updating any supplier addresses, name changes, or updated W-9 forms/information.

APinvoices@uconn.edu – For submitting original invoiced copies only.

APinquiries@uconn.edu – For questions/communications regarding a previously submitted invoice, including invoice status, vendor statements, and past due inquiries or questions on invoices still in workflow.

APdisbursements@uconn.edu – For questions and information relating to payment methods or inquiries on a payment already processed.

For additional information on payment methods available you can also visit the following website:

<https://bursar.uconn.edu/departments/cashoperations/accounts-payable-disbursements>

Travel@uconn.edu – For any travel related questions or questions on a concur related submission.

- **Questions/comments**
- **Open Lab**

<https://purchasing.procurement.uconn.edu/>