

TECHMART SOS & PPS BUYER USER GUIDE



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Folders

Overview

Folders appear in the **Review** section of the Homepage and contain items for notification and items for review and/or approval.

The number of folders a user can see is determined by the roles assigned to the User (See Profile→Roles).

Some folders are created dynamically and are visible only when there are items to view in the Folder.

| Folder Name | Folder Overview |
|---|---|
| My Requisitions | <p>The My Requisitions hyperlink takes the user to their My Requisitions page. This folder contains notification and summary information about purchase requisitions submitted.</p> <p>Users with TechMart Requisitioner role will have this folder.</p> |
| My Req Approvals | <p>The My Req Approvals hyperlink takes approvers to the requisition approval summary page. This folder contains catalog and non-catalog requisitions that are in the midst of the approval process and are pending your approval.</p> <p>Users with Caltech Buyer and Default Approver will have this folder.</p> |
| Purch Agent (<i>plus SOS Buyer's last name, first name</i>) | <p>The Purch Agent hyperlink takes SOS Buyers to the requisition approval summary page. This folder contains non-catalog requisitions that are in the midst of the approval process and are pending your assignment.</p> <p>Users with Caltech Buyer and Default Approver will have this folder.</p> |

| Folder Name | Folder Overview |
|---|---|
| <p>■ PPS Buyer: <i>(plus PPS Buyer's last name)</i></p> | <p>The PPS Buyer: hyperlink takes PPS Buyers to the requisition approval summary page. This folder contains non-catalog requisitions that are in the midst of the approval process and are pending your assignment.</p> <p>Users with Caltech Buyer and Default Approver will have this folder.</p> |
| <p>■ My PO Approvals</p> | <p>The My PO Approvals hyperlink takes approvers to the purchase order approval summary page. This folder contains purchase orders that are in the midst of the approval process and are pending your approval.</p> <p>Users with Caltech Buyer and Default Approver will have this folder.</p> |
| <p>■ Team Lead</p> | <p>The Team Lead hyperlink takes approvers to the purchase order approval summary page. This folder contains purchase orders that are in the midst of the approval process and are pending your approval.</p> <p>Users with TechMart Approver will have this folder.</p> |
| <p>■ Contract Requisition</p> | <p>The Contract Requisition hyperlink takes Contracting Officers to the Subcontracts approval summary page. This folder contains research subcontract requisitions that are in the midst of the approval process and are pending your assignment.</p> <p>Users with Caltech Buyer and Default Approver may have this folder.</p> |

What folders should I have?

| If I have this role... | I may have this folder... |
|------------------------|--|
| TechMart Requisitioner | 📁 My Requisitions |
| Default Approver | 📁 My Req Approvals 📁 My PO Approvals |
| Caltech Buyer | 📁 Purch Agent 📁 PPS Buyer 📁 My Req Approvals 📁 My PO Approvals 📁 Contract Requisitions |
| TechMart Approver | 📁 Team Lead |

What goes into my folders?

| Folder Name | What you will find inside... |
|--|--|
| <p>☐ My Requisitions</p> | <p>Requisitions for which you are the Preparer. Status of a Requisition may be one of the following:</p> <ul style="list-style-type: none"> ✓ Approved ✗ Rejected ← Withdrawn ⏸ Pending Approval ⏸ Pending, but line item(s) rejected ✓ Approved, but line item(s) rejected |
| <p>☐ My Req Approvals</p> | <p>Requisitions you have assigned to yourself and Requisitions that someone has forwarded to you. Status of a Requisition may be one of the following:</p> <ul style="list-style-type: none"> • Not Assigned • Assigned • Notification • Active |
| <p>☐ Purch Agent (<i>plus SOS Buyer's last name, first name</i>)</p> | <ul style="list-style-type: none"> • Non-Catalog Requisitions sent to you (regardless of dollar amount) because the Preparer of the Req identified you as their SOS Buyer. <i>NOTE: If no SOS Buyer is identified when preparing the Req, it would go to the PPS Buyer associated with the Department Code associated with the Req.</i> • Non-Catalog Requisitions forwarded to you (regardless of dollar amount) from another Caltech Buyer • Non-Catalog Requisitions that were "Return to Shared Folder" |

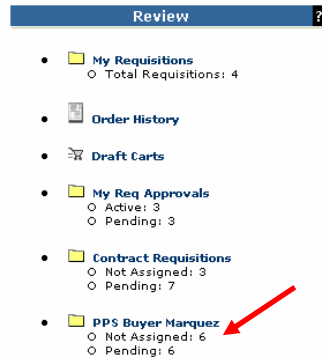
| Folder Name | What you will find inside... |
|--|--|
| ■ PPS Buyer: <i>(plus PPS Buyer's last name)</i> | <ul style="list-style-type: none">• Non-Catalog Requisitions sent to you (regardless of dollar amount) because the Department Code associated with the Requisition is assigned to you as the PPS Buyer• Non-Catalog Requisitions forwarded to you (regardless of dollar amount) from another Caltech Buyer• Non-Catalog Requisitions that were "Return to Shared Folder" |
| ■ My PO Approvals | Non-Catalog Purchase Orders whose associated Department Code is assigned to you as the PPS Buyer. These Purchase Orders are originally created by an SOS Buyer and then sent to you for completion because the Order is over the SOS Buyer's approval limit. |
| ■ Team Lead | This is a shared folder. You will find Non-Catalog Purchase Orders that require a Team Leads approval because the Order is over the PPS Buyer's approval limit. |
| ■ Contract Requisitions | This is a shared folder. You will find Non-Catalog Research Subcontract Orders that require a Contracting Officers a approval |

My Req Approvals

Assign a Requisition

Requisitions in your **Purch Agent** or **PPS Buyer** folder must be “assigned” before the Order can be completed and before changes can be made

1. From the Homepage, click on your **Purch Agent** or **PPS Buyer** folder hyperlink to open up your folder



2. Scroll down until you reach your **Purch Agent** or **PPS Buyer** folder. Find a Requisition you want to process and click the **Assign** button to send the Requisition to your **My Req Approvals** folder

NOTE: Simply clicking on the Requisition Number while it is in your Purch Agent or PPS Buyer folder will only allow you to view the Requisition. You cannot modify the Order until you click assign

[Assign Substitute]

| PPS Buyer Marquez | | | | | | |
|-------------------|----------|----------------|----------|--------------------|-------------------|--------------|
| Status | Pending | No. of Items:8 | | Pending:6 | Page 1 of 1 | |
| Requisition No. | Approver | State | Priority | PR Date/Time | Requisitioner | Amount |
| 1293002 | Assign | Not Assigned | Urgent | 5/17/2005 10:41 AM | Doris Shimabukuro | 625.00 USD |
| 1283382 | Assign | Not Assigned | Normal | 5/12/2005 9:31 AM | Doris Shimabukuro | 500.00 USD |
| 1247608 | Assign | Not Assigned | Normal | 4/27/2005 8:27 AM | Sherri Weed | 19.17 USD |
| 1247560 | Assign | Not Assigned | Normal | 4/27/2005 8:25 AM | Sherri Weed | 19.04 USD |
| 1247556 | Assign | Not Assigned | Normal | 4/27/2005 8:24 AM | Sherri Weed | 237.45 USD |
| 1247457 | Assign | Not Assigned | Normal | 4/27/2005 8:20 AM | Sherri Weed | 1,413.50 USD |


Complete a Requisition





Completing a Requisition in TechMart as an SOS or PPS Buyer will generate a Purchase Order Number

NOTE:

- *If the Requisition is within your approval limit, the Purchase Order will automatically be sent to the Supplier via e-mail or fax if their fax number or e-mail address is loaded in their Oracle supplier profile. If no fax number or e-mail address is loaded in their Oracle supplier profile, TechMart will e-mail the Purchase Order to the PPS Team Leads shared e-mail. A PPS Team Lead will forward the Purchase Order to the appropriate buyer for mail distribution*
- *If the Requisition is over your approval limit and*
 - *you are an SOS Buyer, the Purchase Order will be automatically be sent to the PPS Buyer assigned to the Department Code associated with the Requisition for further processing and approval*
 - *you are a PPS Buyer, the Purchase Order will automatically be sent to the Team Leads folder for further processing and approval*

1. From your **My Req Approvals** folder locate the Requisition you assigned to yourself. Click on the Requisition Number to open it up

NOTE: Never click the Quick Action  button in **My Req Approvals**. Certain information must be completed prior to approval

| My Req Approvals | | | | | | | [Assign Substitute] |
|------------------|---------|----------------|--------------------|-------------------|--------------|---|---------------------|
| Status | Pending | | | | | | ? |
| | | No. of Items:4 | | Pending:4 | | Page 1 of 1 | |
| Requisition No. | State | Priority | PR Date/Time | Requisitioner | Amount | Quick Action | |
| 1293002 | Active | Urgent | 5/17/2005 10:41 AM | Doris Shimabukuro | 625.00 USD |  | |
| 1271513 | Active | Normal | 5/6/2005 2:05 PM | Kimberly R | 40.00 USD |  | |
| 1271472 | Active | Normal | 5/6/2005 1:57 PM | Monica Marquez | 3,000.00 USD |  | |
| 1247611 | Active | Normal | 4/27/2005 8:28 AM | Sherri Weed | 295.00 USD |  | |

2. In the **Supplier Info** section of the Requisition, complete the following fields with your information by choosing from the list of values (your list of values will contain only those items previously loaded in your Profile): **Purch Agent** (your name), **Position** (your approval limit), and **Phone** (your Caltech phone number)

*NOTE: If you fail to complete the **Position** field with your information, your order will go to the Missing Position/Supplier folder where a TechMart Analyst will have to forward the Order back to you for correction*

Available Actions: Completed [Go] Summary Details Approval Status History

Header Information

| General | Internal Info | Supplier Info |
|----------------------------------|-------------------------------------|---|
| Priority: Urgent | Internal Note: attach internal note | Dept Code: 8Q |
| Description: Accumax Solution fc | Attachments: Attach/Link | Purch Agent: [] |
| Prepared by: Doris Shimabukuro | | Position: [] |
| Requestor: Doris Shimabukuro | | Phone: [] |
| | | Supplier Note: attach note to all suppliers |
| | | Attachments: Attach/Link |

3. Click **Save Updates** to save your changes
4. From the **Available Actions** list of values, select **Completed** and click **Go**

Available Actions: Completed [Go] Summary Details Approval Status History

Header Information

| General | Internal Info | Supplier Info |
|----------------------------------|-------------------------------------|---|
| Priority: Urgent | Internal Note: attach internal note | Dept Code: 8Q |
| Description: Accumax Solution fc | Attachments: Attach/Link | Purch Agent: Marquez, Monica |
| Prepared by: Doris Shimabukuro | | Position: PPS Buyer 4 -- \$150,000 Limit |
| Requestor: Doris Shimabukuro | | Phone: (626) 395-2566 |
| | | Supplier Note: attach note to all suppliers |
| | | Attachments: Attach/Link |

Modify/Review Requisition Details

Before you select **Completed** and click **Go**, you may be required to take some action or make some modifications to the Order

Available Actions

Return a Requisition to a Shared Folder

1. With your Requisition open, select **Return to Shared Folder** from the **Available Actions** list of values and click **Go**

The screenshot displays the 'Requisition Details' form. At the top left, the 'Available Actions' dropdown menu is open, showing options: 'Completed', 'Completed', 'Return to Shared Folder', 'Hold', 'Forward to', and 'Notes'. A red arrow points to 'Return to Shared Folder'. To the right of the dropdown is a yellow 'Go' button. The form has tabs for 'Summary', 'Details', 'Approval Status', and 'History'. The 'Header' section includes fields for Priority (Urgent), Description (Accumax Solution fc), Prepared by (Doris Shimabukuro), and Requestor (Doris Shimabukuro). The 'Internal Note' section has an 'attach internal note' link and an 'Attach/Link' button. The 'Supplier Info' section includes Dept Code (8Q), Purch Agent (Marquez, Monica), Position (PPS Buyer 4 -- \$150,000 Limit), and Phone ((626) 395-2566). There are also links for 'attach note to all suppliers' and 'Attach/Link' for attachments.

2. The Requisition is sent back to your **Purch Agent** or **PPS Buyer** folder

Put a Requisition on Hold

1. With your Requisition open, select **Hold** from the **Available Actions** list of values and click **Go**

The screenshot shows the 'Available Actions' dropdown menu with the following options: Completed, Return to Shared Folder, Hold (selected), Forward to, and Notes. The 'Go' button is highlighted in yellow. The background shows the 'Header' and 'Supplier Info' sections of a requisition form.

2. In the pop-up window, enter your reason for putting the Requisition on hold and click **Hold**

The pop-up window is titled 'Requisition No. 1293002'. It has a 'Close' button at the top right. The main area is a text input field with the text: 'Waiting for Supplier Management to update Supplier's address.' Below the text area, there is a note: 'Maximum allowed characters are 1000. Characters beyond that limit will not be saved. Once added, the note is accessible from the History tab.' At the bottom, there are 'Hold' and 'Cancel' buttons.

3. The system will take you back to your **My Req Approvals** folder. The Requisition will remain on hold until another **Available Action** is chosen

The screenshot shows the 'My Req Approvals' table with the following data:

| Requisition No. | State | Priority | PR Date/Time | Requisitioner | Amount | Quick Action |
|-----------------|--------|----------|--------------------|-------------------|--------------|--------------|
| 1294412 | Active | Normal | 5/17/2005 2:17 PM | Sherri Weed | 10.00 USD | Approve |
| 1294409 | Active | Normal | 5/17/2005 2:16 PM | Sherri Weed | 5.00 USD | Approve |
| 1294379 | Active | Normal | 5/17/2005 2:11 PM | Sherri Weed | 5.00 USD | Approve |
| 1293002 | Hold | Urgent | 5/17/2005 10:41 AM | Doris Shimabukuro | 625.00 USD | Approve |
| 1271513 | Active | Normal | 5/6/2005 2:05 PM | Kimberly R | 40.00 USD | Approve |
| 1271472 | Active | Normal | 5/6/2005 1:57 PM | Monica Marquez | 3,000.00 USD | Approve |
| 1247611 | Active | Normal | 4/27/2005 8:28 AM | Sherri Weed | 295.00 USD | Approve |

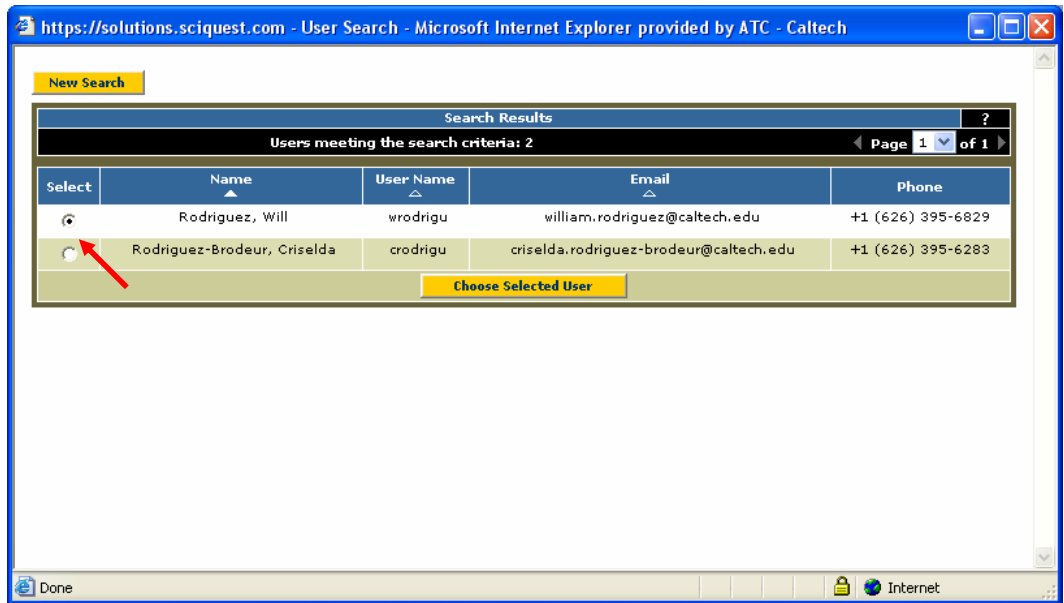
Forward a Requisition

1. With your Requisition open, select **Forward to** from the **Available Actions** list of values and click **Go**

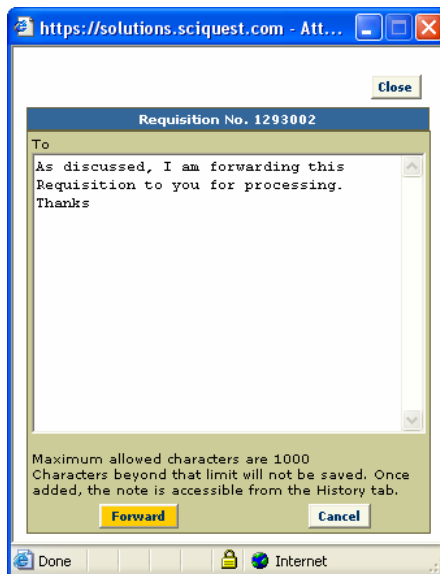
2. In the pop-up window, complete one or more fields and click **Search**. The more fields you complete, the more you will narrow your search results

3. In the pop-up window, select a user by clicking on the radio button and click **Choose Selected User**

If your search did not return the results you expected click **New Search** and enter different criteria for your search



4. In the pop-up window, enter a reason for forwarding the Requisition and click **Forward**



5. The system will take you back to your **My Req Approvals** folder. The Requisition will be sent to the new user's **My Req Approvals** folder

Add Notes to a Requisition

1. With your Requisition open, select **Notes** from the **Available Actions** list of values and click **Go**

The screenshot shows the top portion of a requisition form. The 'Available Actions' dropdown menu is open, showing options: Completed, Return to Shared Folder, Hold, Forward to, and Notes. The 'Notes' option is highlighted with a red arrow. Below the menu, the form has tabs for 'Summary', 'Details', 'Approval Status', and 'History'. The 'Header' section includes fields for Priority (Urgent), Description (Accumax Solution fc), Prepared by (Doris Shimabukuro), and Requestor (Doris Shimabukuro). The 'Internal Info' section has an 'attach internal note' button. The 'Supplier Info' section includes Dept Code (8Q), Purch Agent (Marquez, Monica), Position (PPS Buyer 4 -- \$150,000 Limit), Phone ((626) 395-2566), and a 'Supplier Note' section with an 'attach note to all suppliers' button.

2. In the pop-up window, enter your note and click **Attach**

The screenshot shows a browser window with a pop-up titled 'Requisition No. 1293002'. The window has a 'Close' button at the top right. Below the title bar is a text area containing the note: 'Called Supplier on 5/17/05 to verify items were in stock.' At the bottom of the text area, there is a note: 'Maximum allowed characters are 1000. Characters beyond that limit will not be saved. Once added, the note is accessible from the History tab.' Below this note are two buttons: 'Attach' and 'Cancel'.

3. Click on the Requisition's **History** tab to view your note

The screenshot shows the 'History' tab of the requisition form, which is circled in red. A red arrow points to the first entry in the history table. The table has columns for Line No, Date/Time, User, Action, and Note.

| Line No | Date/Time | User | Action | Note |
|---------|--------------------|-------------------|-------------------------|--|
| | 5/18/2005 8:55 AM | Monica Marquez | Requisition note added | Called Supplier on 5/17/05 to verify items were in stock. |
| | 5/18/2005 8:23 AM | Monica Marquez | Requisition put on hold | Waiting for Supplier Management to update Supplier's address. |
| | 5/18/2005 8:04 AM | Monica Marquez | Requisition assigned | |
| | 5/18/2005 7:37 AM | Monica Marquez | Requisition unassigned | |
| | 5/17/2005 12:51 PM | Monica Marquez | Requisition modified | Phone value changed from <i>empty</i> to (626) 395-2566 |
| | 5/17/2005 12:51 PM | Monica Marquez | Requisition modified | Position value changed from <i>empty</i> to PPS Buyer 4 |
| | 5/17/2005 12:51 PM | Monica Marquez | Requisition modified | Purch Agent value changed from <i>empty</i> to Marquez, Monica |
| | 5/17/2005 10:49 AM | Monica Marquez | Requisition assigned | |
| | 5/17/2005 10:41 AM | Doris Shimabukuro | Requisition submitted | |

Summary Tab

Reject a Requisition Line

1. With your Requisition open, select a line item on the Requisition you want to reject by clicking in the **Select** box for that line. A check mark will appear

| Status | Product Name | Supplier | Catalog No. | Unit Price | Qty / UOM | Extended Price | Select |
|--------|--|----------|-------------|------------|-------------|----------------|-------------------------------------|
| | Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes | Chemicon | SCR006 | 125.00 | 5 100/ML | 625.00 | <input checked="" type="checkbox"/> |

2. From the **Requisition Details** list of values, select **Reject Selected Items** and click **Go**

| Status | Product Name | Supplier | Catalog No. | Unit Price | Qty / UOM | Price | Select |
|--------|--|----------|-------------|------------|-------------|--------|--------------------------|
| | Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes | Chemicon | SCR006 | 125.00 | 5 100/ML | 625.00 | <input type="checkbox"/> |

3. In the pop-up window, enter a reason for rejecting the Requisition line(s) and click **Reject Line Item**

Requisition No. 1293002

Reject Line Reason

Department Preparer wants to cancel the order.

Maximum allowed characters are 1000
Characters beyond that limit will not be saved. Once added, the note is accessible from the History tab.

Reject Line Item Cancel

4. The status icon of a rejected line will change from to

Un-reject a Requisition Line

1. A Requisition line can be un-rejected before it is completed. With your Requisition open, select a rejected line item on the Requisition you want to un-reject by clicking in the **Select** box for that line. A check mark will appear.

| Status | Product Name | Supplier | Catalog No. | Unit Price | Qty/ UOM | Extended Price | Select |
|--------|--|----------|-------------|------------|----------|----------------|-------------------------------------|
| | Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes | Chemicon | SCR006 | 125.00 | 5 100/ML | 625.00 | <input checked="" type="checkbox"/> |

2. From the **Requisition Details** list of values, select **Un-reject Selected Items** and click **Go**

| Status | Product Name | Supplier | Catalog No. | Unit Price | Qty/ UOM | Price | Select |
|--------|--|----------|-------------|------------|----------|--------|--------------------------|
| | Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes | Chemicon | SCR006 | 125.00 | 5 100/ML | 625.00 | <input type="checkbox"/> |

3. The status icon of an un-rejected line will change from to

Add a Requisition Line Item to your Favorites

1. With your Requisition open, select a line item on the Requisition you want to add to your favorite's folder by clicking in the **Select** box for that line. A check mark will appear

| Status | Product Name | Supplier | Catalog No. | Unit Price | Qty / UOM | Extended Price | Select |
|--------|--|----------|-------------|------------|-------------|----------------|-------------------------------------|
| | Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes | Chemicon | SCR006 | 125.00 | 5 100/ML | 625.00 | <input checked="" type="checkbox"/> |

2. From the **Requisition Details** list of values, select **Add To Favorites** and click **Go**

| Status | Product Name | Supplier | Catalog No. | Unit Price | Qty / UOM | Price | Select |
|--------|--|----------|-------------|------------|-------------|--------|-------------------------------------|
| | Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes | Chemicon | SCR006 | 125.00 | 5 100/ML | 625.00 | <input checked="" type="checkbox"/> |

3. In the pop-up window, select the destination folder for the item. You may also edit the item name and quantity here. Click **Submit**

Select the destination folder for this item.

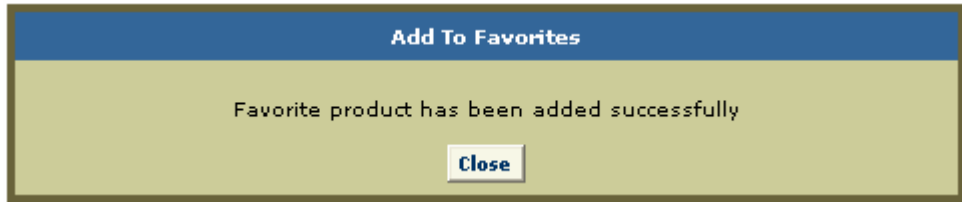
- My Favorites
- My Forms

Enter a nickname and default Add to Cart quantity for the item(s).

| Edit Selected Names | Quantity | Catalog No. |
|--------------------------------------|----------|-------------|
| Accumax: cell detachment solution of | 5 | SCR006 |

Buttons: **Submit**, **Cancel**

4. The system will display the following message:



Details Tab

Within the **Details Tab** of a Requisition, you can modify the shipping address, delivery method, tax and equipment screening certification information, and the POETA at the line level or at the header level, where a single modification can apply to all the lines of the Requisition.

*NOTE: To modify Requisition details at the **Header Level**, select and click one of the buttons below from the **Edit Details – for all products** section; any changes made will apply to all Requisition line items*

| Edit Details - for all products | | | | | | |
|---------------------------------|---------|----------|--------------------------|-------|----------------|--|
| Ship To | Bill To | Delivery | Supplier & Internal Info | POETA | Internal Notes | |

*To modify Requisitions details at the **Line Level** select and click one of the buttons below from the **External Purchases** section; any changes made will apply only to the line(s) item selected*

| External Purchases | | | | | | | |
|---|--|--|-------------|--------------------------|-----------|----------------|--------------------------|
| Status | Product Name | Supplier | Catalog No. | Unit Price | Qty / UOM | Extended Price | Select |
| | Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes | Chemicon | SCR006 | 125.00 | 5 100/ML | 625.00 | <input type="checkbox"/> |
| Ship To | | Ship To | | Bill To | | Bill To | |
| Doris Shimabukuro 391 S Holliston Ave Pasadena, CA 91125 United States | | California Institute of Technology Payment Services 1200 E California 103-6 Pasadena, CA 91125 United States | | | | | |
| Delivery | | Delivery | | PO Number | | To Be Assigned | |
| Expedite x | | Ship Via Best Carrier-Best Way | | Codes | | POETA | |
| Req Delivery | | Supplier & Internal Info | | Project AB1.00001 | | | |
| | | Pricing Code | | Task 1 | | | |
| | | Account Code | | Award OAUD.CITRESRCH | | | |
| | | External Note | | Expenditure Bank Charges | | | |
| Tax Information | | Plus Applicable Sales Tax | | Organization Caltech | | | |
| Equipment Screening Certification No | | | | Internal Info | | Internal Notes | |
| Attachments | | | | Internal Note | | Attachments | |

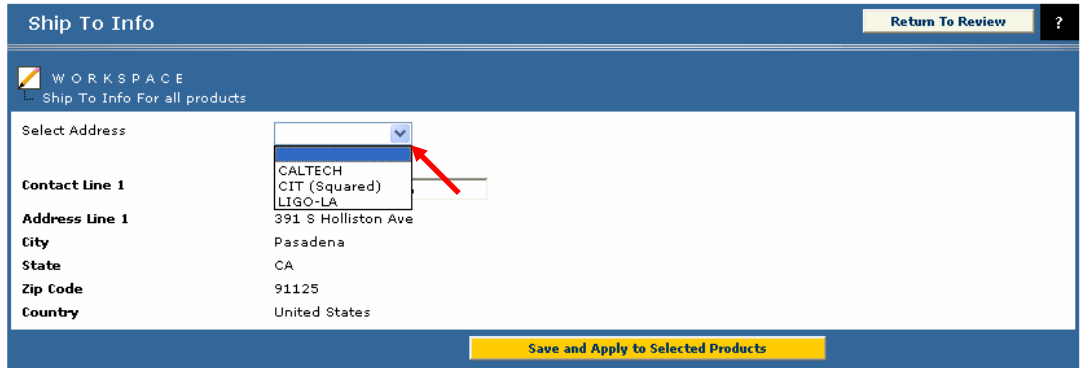
Modify the Shipping Address

1. With your Requisition open, click the **Ship To** button to open the **Ship To Info** screen
2. Verify the lines you want to modify are selected with a checkmark

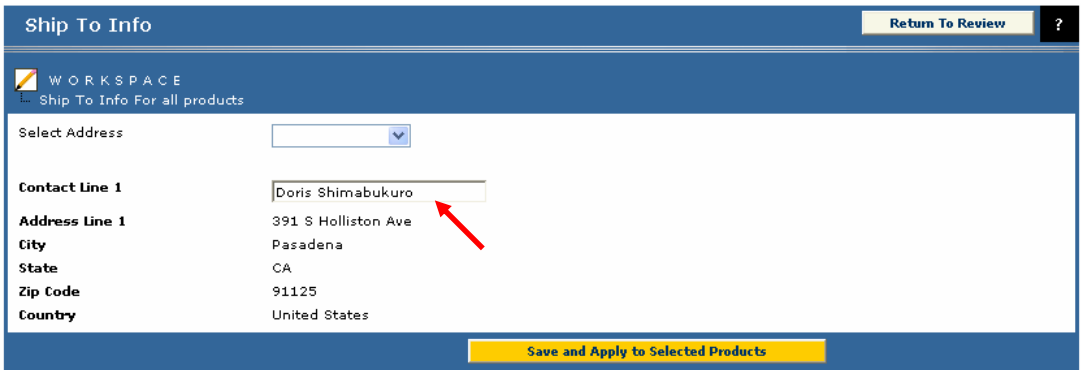
| Select All | Deselect All | | | | | | | | | | | | | |
|---|--|---|------|--|-----------|----------|--------------------|--------|-----------|---|-----------------|--------|---|--|
| Select | <input type="checkbox"/> | List of All Products in Cart | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <table border="1"> <tr> <td>Edit</td> <td>Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes</td> </tr> <tr> <td>Supplier:</td> <td>Chemicon</td> </tr> <tr> <td>Catalog No. (SKU):</td> <td>SCR006</td> </tr> <tr> <td>Quantity:</td> <td>5</td> </tr> <tr> <td>Extended Price:</td> <td>625.00</td> </tr> <tr> <td colspan="2">Doris Shimabukuro 391 S Holliston Ave Pasadena, CA 91125 United States</td> </tr> </table> | Edit | Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes | Supplier: | Chemicon | Catalog No. (SKU): | SCR006 | Quantity: | 5 | Extended Price: | 625.00 | Doris Shimabukuro 391 S Holliston Ave Pasadena, CA 91125 United States | |
| Edit | Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes | | | | | | | | | | | | | |
| Supplier: | Chemicon | | | | | | | | | | | | | |
| Catalog No. (SKU): | SCR006 | | | | | | | | | | | | | |
| Quantity: | 5 | | | | | | | | | | | | | |
| Extended Price: | 625.00 | | | | | | | | | | | | | |
| Doris Shimabukuro 391 S Holliston Ave Pasadena, CA 91125 United States | | | | | | | | | | | | | | |

- In the **Workspace** section, to modify the shipping address, select a new address from the **Select Address** list of values

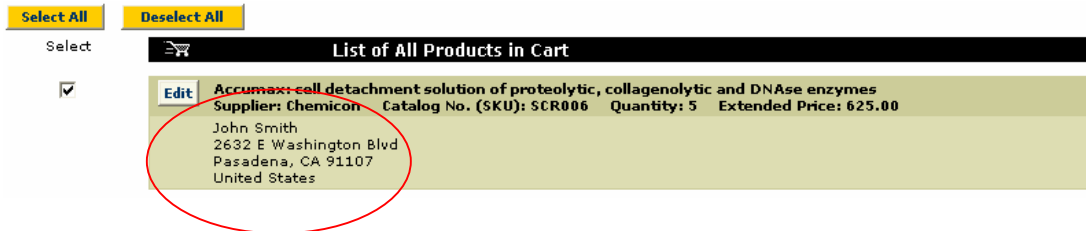
NOTE: The items loaded in your Addresses profile determine this list of values



- To modify the contact information, complete the **Contact Line 1** field as needed



- Click **Save and Apply to Selected Products** to save your changes. Each line item selected will display the updated information



- Click **Return To Review** to return to the **Details Tab**

Verify the Billing Address

NOTE: Caltech has only one billing address – Payment Services. This address cannot be modified

1. With your Requisition open, click the **Bill To** button to open the **Bill To Info** screen
2. Verify the billing address

Bill To Info Return To Review ?

WORKSPACE
Bill To Info From [Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes]

Select Address

| | |
|-----------------------|------------------------------------|
| Contact Line 1 | California Institute of Technology |
| Contact Line 2 | Payment Services |
| Address Line 1 | 1200 E California 103-6 |
| City | Pasadena |
| State | CA |
| Zip Code | 91125 |
| Country | United States |

Save and Apply to Selected Products

Select All **Deselect All**

Select

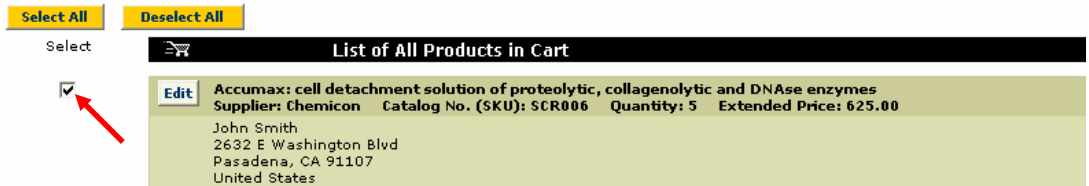
List of All Products in Cart

| | |
|-------------|---|
| Edit | Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes Supplier: Chemicon Catalog No. (SKU): SCR006 Quantity: 5 Extended Price: 625.00 |
| | California Institute of Technology Payment Services 1200 E California 103-6 Pasadena, CA 91125 United States |

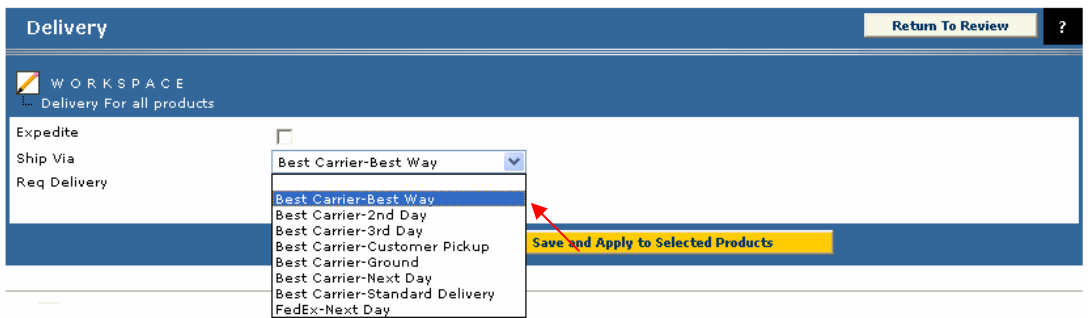
3. Click Return To Review to return to the **Details Tab**

Modify the Delivery Method

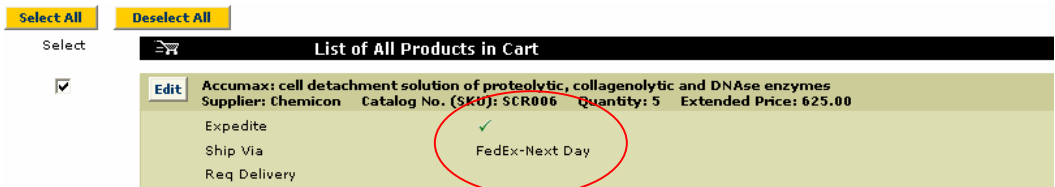
1. With your Order open, click the **Delivery** button to open the **Delivery** screen.
2. Verify the lines you want to modify are selected with a checkmark



3. In the **Workspace** section, to modify the delivery method, select a new method from the **Ship via** list of values. You can also check the **Expedite** box to flag an item as a rush. This flag will be included with the order when placed. You can also identify a **Requested Delivery** date



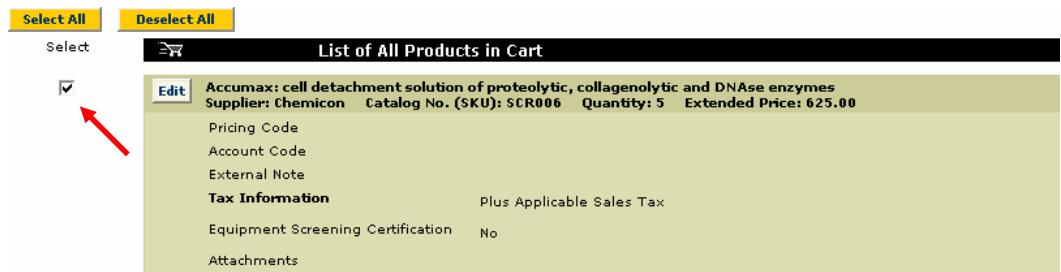
4. Click **Save and Apply to Selected Products** to save your changes. Each line item selected will display the updated information



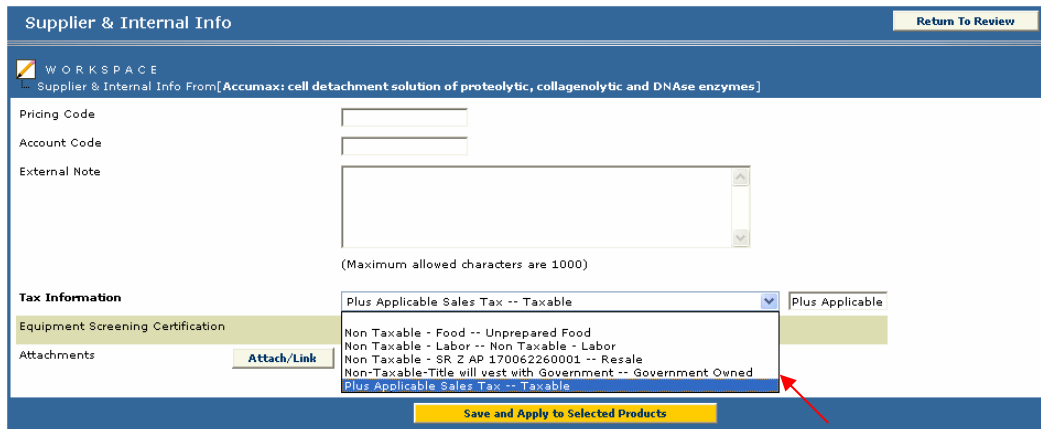
5. Click **Return To Review** to return to the **Details Tab**

Modify Tax Information

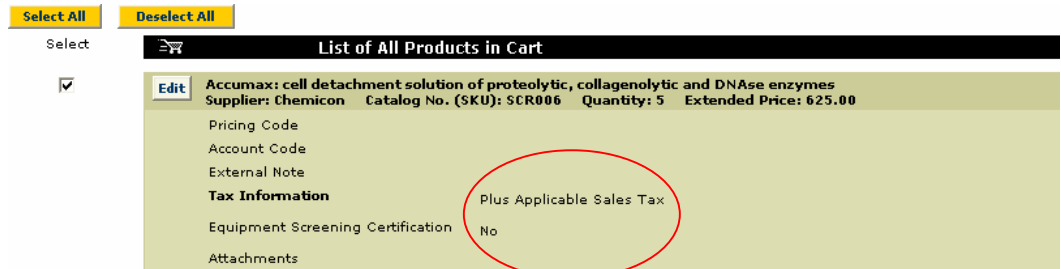
1. With your Order open, click the **Supplier & Internal Info** button to open the **Supplier & Internal Info** screen.
2. Verify the lines you want to modify are selected with a checkmark



3. In the **Workspace** section, to modify the tax information, select a new tax command from the **Tax Information** list of values



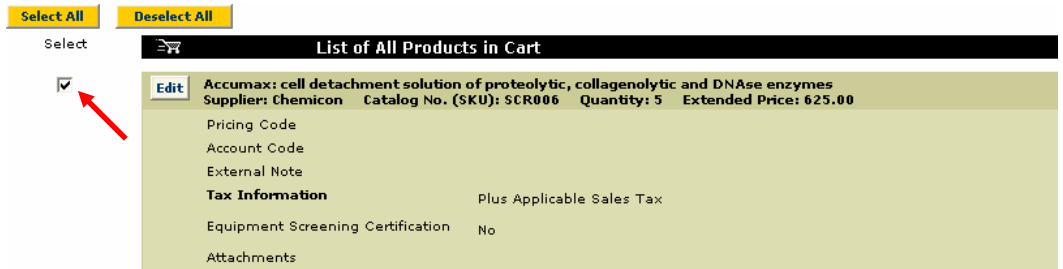
4. Click **Save and Apply to Selected Products** to save your changes. Each line item selected will display the updated information



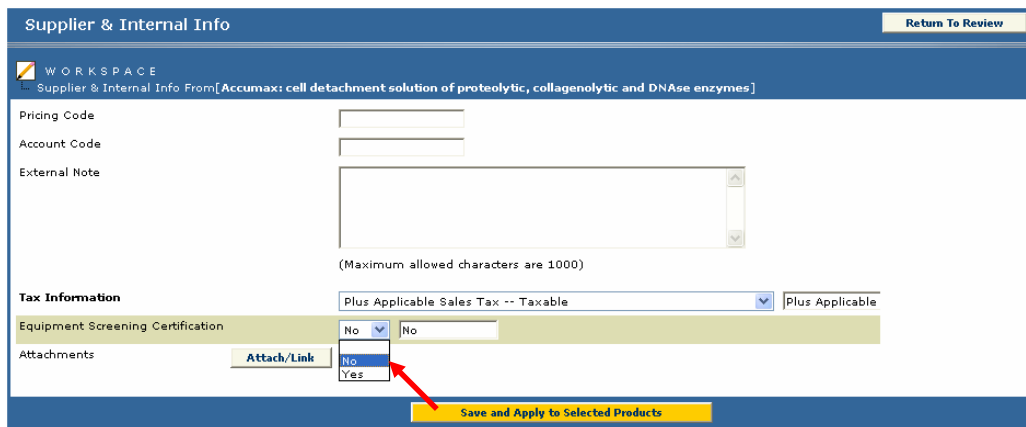
5. Click **Return To Review** to return to the **Details Tab**

Modify the Equipment Certification Information

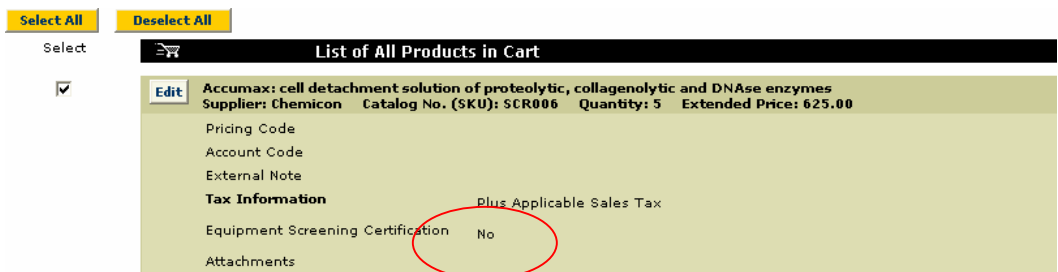
1. With your Order open, click the **Supplier & Internal Info** button to open the **Supplier & Internal Info** screen.
2. Verify the lines you want to modify are selected with a checkmark



3. In the **Workspace** section, to modify the equipment screening certification information, select Yes or No from the **Equipment Screening Certification** list of values



4. Click **Save and Apply to Selected Products** to save your changes. Each line item selected will display the updated information



5. Click **Return To Review** to return to the **Details Tab**

Modify the POETA & Expenditure Type (Split POETA)

1. With your Requisition open, click the **POETA** button to open the **Accounting Codes** screen.
2. Verify the lines you want to modify are selected with a checkmark

Select All Deselect All

Select

List of All Products in Cart

Edit Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes
Supplier: Chemicon Catalog No. (SKU): SCR006 Quantity: 5 Extended Price: 625.00

| | |
|---------------|----------------|
| Project | AB1.00001 |
| ↳ Task | 1 |
| ↳ Award | OAID.CITRESRCH |
| ↳ Expenditure | Bank Charges |
| Organization | Caltech |

3. In the **Workspace** section, to modify the POETA and Expenditure Type, select a new Project, Task, Award, and Expenditure Type from each list of values

NOTE: The items loaded in your Custom Fields profile determine these lists of values. If you want to enter a POETA combination that is not loaded in your Custom Fields profile, you may manually enter the combination in the blank fields to the right of each list of values.

- POETA combinations must be entered exactly as they are currently loaded in Oracle.
- POETA combinations entered incorrectly will result in an error message.
- Only POETA combinations that are active (open) will display and be available in TechMart

Accounting Codes Return To Review

WORKSPACE
Accounting Codes For all products

| Code | Action | Value |
|--------------------------------------|--------------------|--|
| Grouped Accounting Elements 1 | | |
| Project | Split... Split | AB1.00001 |
| ↳ Task | | ATC.00001 -- ADMIN TECH CENTER FIN.00006 -- PURCHASING&PAYMENT SERVICES HAL.00005 -- R01 NS11756 |
| ↳ Award | | OAID.CITRESR< |
| ↳ Expenditure | | Bank Charges |
| Organization | Caltech -- Caltech | Caltech |

Save and Apply to Selected Products

- To split a POETA select the method by which you want to split from the **Split** list of values and click **Split**

Accounting Codes Return To Review

WORKSPACE
Accounting Codes For all products

| Code | Action | Value |
|--------------------------------------|--|---|
| Grouped Accounting Elements 1 | | |
| Project | Split... Split | HAL.00005 -- R01 NS11756 HAL.00005 |
| L Task | Split... % of Price % of Qty Amount of Price Amount of Qty | 1 -- 1 1 |
| L Award | | NIH.000051 -- 2 R01 NS11756-26A1 NIH.000051 |
| L Expenditure | | Supplies - Allocable -- Supplies - Allocable Supplies - Alloc |
| Organization | | Caltech -- Caltech Caltech |

Save and Apply to Selected Products

- In the new **Value** section, enter the second POETA/Expenditure Type combination manually or choose from each list of values. Click **Add Split** to add additional splits

Accounting Codes

WORKSPACE
Accounting Codes For all products

| Code | Action | Value |
|--------------------------------------|-------------------------|--|
| Grouped Accounting Elements 1 | | |
| | Recalculate Add Split | Remove Remove |
| | Total: 0.00 | 0.00 0.00 |
| Project | Amount of Qty Split | HAL.00005 -- R01 NS11756 HAL.00005 HAL.00005 -- R01 NS11756 |
| L Task | | 1 -- 1 1 1 -- 1 1 |
| L Award | | NIH.000051 -- 2 R01 NS11756-26A1 NIH.000051 NIH.000051 -- 2 R01 NS11756-26A1 |
| L Expenditure | | Supplies - Allocable -- Supplies - Allocable Supplies - Alloc Supplies - Allocable -- Supplies - Allocable |
| Organization | | Caltech -- Caltech Caltech Caltech -- Caltech Caltech |

Save and Apply to Selected Products

- In the **Value** section of each split, assign a value to each split (this is based on the method of split you have selected). For example, **Amount of Qty** on a line item with Quantity 5 can be split as follows, 4 & 1 and 2 & 3. Click **Recalculate** to verify your split is mathematically correct. To remove a split click **Remove**

Accounting Codes

WORKSPACE
Accounting Codes For all products

| Code | Action | Value | |
|--------------------------------------|---|--|--|
| Grouped Accounting Elements 1 | | | |
| | <input type="button" value="Recalculate"/> <input type="button" value="Add Split"/> | <input type="button" value="Remove"/> | <input type="button" value="Remove"/> |
| | Total: 5.00 | 2.00 | 3.00 |
| Project | Amount of Qty <input type="button" value="Split"/> | HAL.00005 -- R01 NS11756 | ATC.00001 -- ADMIN TECH CENTER |
| L Task | 1 -- 1 <input type="text" value="1"/> | 1.1 -- 1.1 <input type="text" value="1.1"/> | |
| L Award | | NIH.000051 -- R01 NS11756-26A1 | GB.000003 -- ATC |
| L Expenditure | | Supplies - Allocable -- Supplies - Allocable | Supplies - Allocable -- Supplies - Allocable |
| Organization | | Caltech -- Caltech | Caltech -- Caltech |

- Click **Save and Apply to Selected Products** to save your changes. Each line item selected will display the updated information

Select All

Select

List of All Products in Cart

Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes
Supplier: Chemicon Catalog No. (SKU): SKR006 Quantity: 5 Extended Price: 625.00

Project HAL.00005 (2.00 Amount of Qty)
ATC.00001 (3.00 Amount of Qty)

L Task 1 (2.00 Amount of Qty)
1.1 (3.00 Amount of Qty)

L Award NIH.000051 (2.00 Amount of Qty)
GB.000003 (3.00 Amount of Qty)

L Expenditure Supplies - Allocable (2.00 Amount of Qty)
Supplies - Allocable (3.00 Amount of Qty)

Organization Caltech (2.00 Amount of Qty)
Caltech (3.00 Amount of Qty)

- Click **Return To Review** to return to the **Details Tab**

Modify Requisition Supplier Name: New or Unknown Supplier

A Supplier Name may be modified at any point before the Requisition becomes a Purchase Order. A Supplier Name should be modified if the Preparer selected the wrong Supplier Name or the Supplier Name field reads *New Supplier* or *Unknown Supplier*.

NOTE: If you fail to change the Supplier Name from New or Unknown Supplier to a valid Supplier Name, your Order will go to the Missing Position/Supplier folder, where a TechMart Analyst will have to forward the Order back to you for correction

1. With your Requisition open, click on the product name to open the Non-Catalog form

| External Purchases | | | | | | | |
|--------------------|--------------|--------------|-------------|------------|-----------|----------------|--------------------------|
| Status | Product Name | Supplier | Catalog No. | Unit Price | Qty / UOM | Extended Price | Select |
| | Delux Widget | New Supplier | 2345-XC | 25.00 | 2 EA | 50.00 | <input type="checkbox"/> |

2. If the Supplier is a *New Supplier*, locate the New Supplier's information in the New Supplier Info field. Provide this information to Supplier Management who will add this Supplier to the Supplier Database

GENERAL INFO

General Info Instructions: Please use this form for new Spot Buy orders. Attach any supporting documentation (i.e. supplier quotation, specifications, etc.) below, fax to your SOS/PPS Buyer, or mail to Purchasing Services at Mail Code 103-6. Please reference the Requisition Number on all documents.

Form Type: Spot Buy

Item No.:

Product Name/Description:

Quantity:

Unit of Measure: EA --- Each

Amount: USD

Health and Safety

Controlled substance

Radioactive

Rad Minor

New Supplier Info.

Widget Depot
125 Main Street
Pasadena, CA 91125
(626) 555-1515

- Once Supplier Management notifies you that the Supplier has been added, click **Search** in the **Supplier Info** field of the Non-Catalog form
- In the **Non-Catalog Item Form**, remove the current contents of the **Supplier Name** field

Non-Catalog Item Form

Use the Non-catalog Form to request products not available in a hosted or punch out catalog. Fill out the form with all known details. Once finished add the form to shopping cart by pressing the button at the bottom of this form.

Form - Supplier Info

Supplier Name: New Supplier

Page Size: 10

Search Cancel

- In the **Supplier Name** field, enter the first few letters of the New Supplier's name and click **Search** to bring up a list of Suppliers

Non-Catalog Item Form

Use the Non-catalog Form to request products not available in a hosted or punch out catalog. Fill out the form with all known details. Once finished add the form to shopping cart by pressing the button at the bottom of this form.

Form - Supplier Info

Supplier Name: Widget

Page Size: 10

Search Cancel

Choose Selected Supplier

Number of supplier(s)/catalog(s) meeting the search criteria: 2 -- Please select from the list below or create a new supplier. Page 1 of 1

| Select | Supplier Name | Supplier Phone | Supplier Fax No. |
|----------------------------------|--------------------|-------------------|-------------------|
| <input type="radio"/> | Western Analytical | +1 (800) 541-8421 | +1 (800) 542-8421 |
| <input checked="" type="radio"/> | Widget Depot | +1 (800) 555-1515 | +1 (800) 541-8422 |

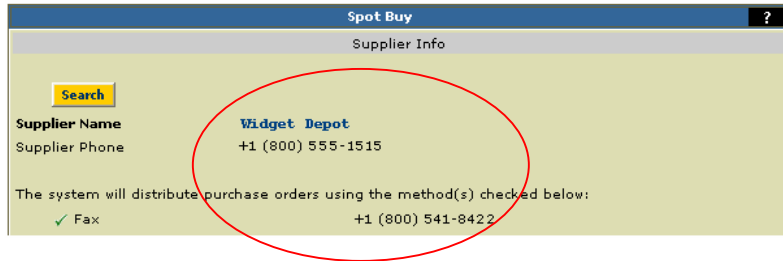
- Select a Supplier by clicking on the radio button and click

Choose Selected Supplier

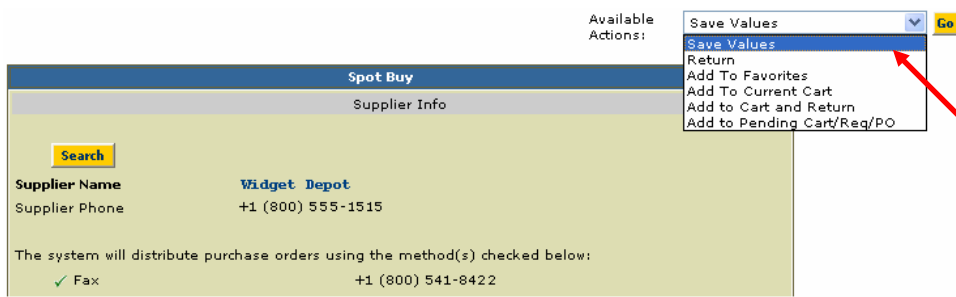
Number of supplier(s)/catalog(s) meeting the search criteria: 2 -- Please select from the list below or create a new supplier. Page 1 of 1

| Select | Supplier Name | Supplier Phone | Supplier Fax No. |
|----------------------------------|--------------------|-------------------|-------------------|
| <input type="radio"/> | Western Analytical | +1 (800) 541-8421 | +1 (800) 542-8421 |
| <input checked="" type="radio"/> | Widget Depot | +1 (800) 555-1515 | +1 (800) 541-8422 |

- The system will take you back to the Non-Catalog form. Verify the New Supplier Info



- From the Available Actions list of values select **Save Values** and click **Go**



- Select **Return** and click **Go**



- The system will take you back to the Requisition. Verify New Supplier name

| External Purchases | | | | | | | |
|--------------------|--|---------------------|-------------|------------|-----------|----------------|--------------------------|
| Status | Product Name | Supplier | Catalog No. | Unit Price | Qty / UOM | Extended Price | Select |
| | <input checked="" type="checkbox"/> Delux Widget | Widget Depot | 2345-XC | 25.00 | 2 EA | 50.00 | <input type="checkbox"/> |

- Click **Save Updates**

Non-Catalog Forms

Modify Requisition

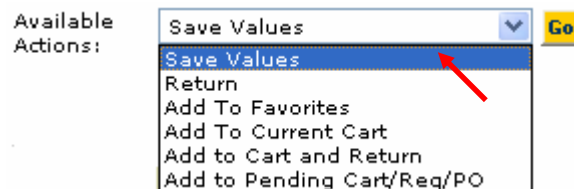
- **Supplier Name (See My Req Approvals→Modify/Review Requisition Details→Modify the Requisition Supplier Name: New or Unknown Supplier)**
- **Order Distribution (Fax or E-Mail):** Allows you to change the method of order distribution on an order-by-order basis. The default method for all other orders will not be affected by your change on a particular order. Order distribution may be made via fax or e-mail
- **Item Number**
- **Product Name**
- **Quantity**
- **Unit of Measure (UOM)**
- **Unit Price**
- **Amount**

NOTE: If the Requisition contains multiple line items, you must click on the appropriate line item Product Name to modify its details

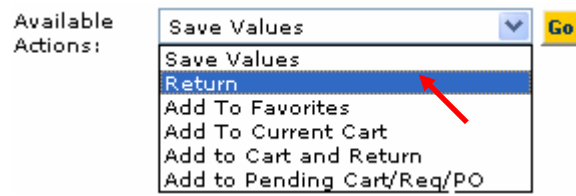
1. With your Requisition open, click on the product name to open the Non-Catalog form

| External Purchases | | | | | | | |
|--------------------|---|----------------------|-------------|------------|----------|----------------|--------------------------|
| Status | Product Name | Supplier | Catalog No. | Unit Price | Qty/UOM | Extended Price | Select |
| | <input type="checkbox"/> Provide laboratory assistance from approximately 6/1/05 to 6/15/05. Amount is estimated. | Bio-Rad Laboratories | None | 80.00 | 15 DA | 1,200.00 | <input type="checkbox"/> |

2. Modify the fields of the Non-Catalog form as needed
3. From the **Available Actions** list of values select **Save Values** and click **Go**



4. Select **Return** and click **Go**



5. The system will take you back to the Requisition. Verify the updated information

6. Click 

My PO Approvals

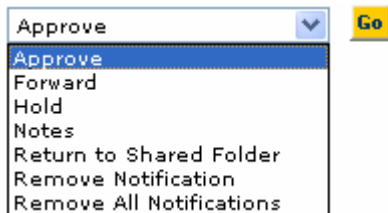
SOS Buyer's My PO Approvals Folder

An SOS Buyer's **My PO Approvals** folder provides Purchase Order notification only. Purchase Orders found in this folder are those that have been completed by the SOS Buyer – the Order is within their approval limit. This folder also contains Purchase Orders that have been created by the SOS Buyer and systematically sent to a PPS Buyer for completion – the Order is over the SOS Buyer's approval limit. Clicking on the Purchase Order Number will open the Order for viewing

| My PO Approvals | | | | | | | |
|-----------------|--------------|----------|--------------------|----------------|---------------------------|----------------|--------------------------|
| Status | Pending | | No. Of Items: 6 | | Pending: 6 | | Page 1 of 1 |
| PO No | State | Priority | Date/Time | Requisitioner | Supplier | Amount | Select |
| 463975 | Notification | Normal | 5/16/2005 12:48 PM | Pamela Croomes | EMD Biosciences, Inc. | 100,000.00 USD | <input type="checkbox"/> |
| 463445 | Notification | Normal | 5/13/2005 12:43 PM | Pamela Croomes | VWR International | 21.94 USD | <input type="checkbox"/> |
| 463444 | Notification | Normal | 5/13/2005 12:43 PM | Pamela Croomes | Sigma-Aldrich | 4,900.00 USD | <input type="checkbox"/> |
| 463413 | Notification | Normal | 5/13/2005 12:35 PM | Pamela Croomes | 1ST Chemistry.com | 222.00 USD | <input type="checkbox"/> |
| 463347 | Notification | Normal | 5/13/2005 12:19 PM | Pamela Croomes | Grainger, Inc. | 51,392.00 USD | <input type="checkbox"/> |
| 463294 | Notification | Normal | 5/13/2005 11:44 AM | Pamela Croomes | Amersham Biosciences Inc. | 30,600.00 USD | <input type="checkbox"/> |

*NOTE: In the **Action** list of values for **My PO Approvals** folder (pictured below), **Approve**, **Hold**, and **Return to Shared Folder** will result in the following message (the remaining Actions, **Forward**, **Remove Notification** and **Remove All Notifications** may be performed):*

The action you have selected cannot be applied to an item in Notification state.

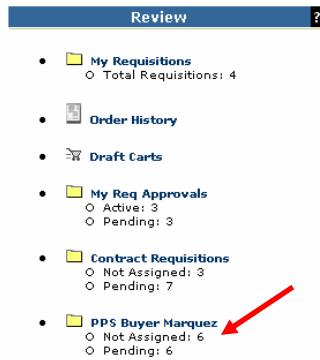


PPS Buyer's My PO Approvals Folder

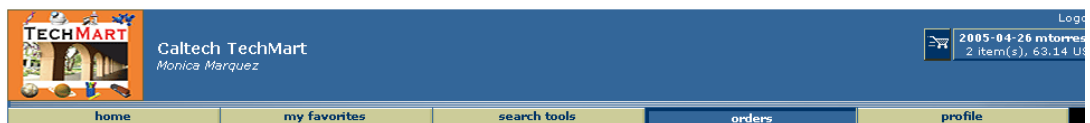
Assign a Purchase Order

Purchase Orders in a PPS Buyer's **PPS Buyer** folder are Purchase Orders that an SOS Buyer has initiated and are systematically sent to the PPS Buyer for completion – Orders are over the SOS Buyer's approval limit. Purchase Orders in your PPS Buyer folder must be "assigned" before the Order can be completed and before changes can be made

1. From the Homepage, click on your **PPS Buyer** folder hyperlink to open up your folder



2. Click **Purchase Orders** on the menu bar located on the left side of the screen



- Find a Purchase Order you want to process and click the **Assign** button to send the Purchase Order to your **My PO Approvals** folder

NOTE: Simply clicking on the Purchase Order Number while it is in your PPS Buyer folder will only allow you to view the Purchase Order. You cannot modify the Order until you click assign

[Assign Substitute] Action Assign

| PPS Buyer Marquez | | | | | | | | |
|-------------------|----------|-----------------|----------|--------------------|-------------------|-------------------|---------------|--------------------------|
| Status Pending | | No. Of Items: 2 | | Pending: 2 | | Page 1 of 1 | | |
| PD No. | Approver | State | Priority | Date/Time | Requisitioner | Supplier | Amount | Select |
| S000034 | Assign | Not Assigned | Normal | 5/24/2005 10:39 AM | Doris Shimabukuro | Chemicon | 62,500.00 USD | <input type="checkbox"/> |
| S000013 | Assign | Not Assigned | Normal | 5/20/2005 12:00 PM | Sherri Weed | 1ST Chemistry.com | 11,000.00 USD | <input type="checkbox"/> |

Complete a Purchase Order

“Completing” a Purchase Order in TechMart will automatically send the Purchase Order to the Supplier if their fax number or e-mail address is loaded in their Oracle supplier profile. If no fax number or e-mail address is loaded in their Oracle supplier profile, TechMart will e-mail the Purchase Order to the PPS Team Leads shared e-mail. A PPS Team Lead will forward the Purchase Order to the appropriate buyer for mail distribution

NOTE:

- *If the Purchase Order is within your approval limit, the Purchase Order will automatically be sent to the Supplier as noted above*
- *If the Purchase Order is over your approval limit, the Purchase Order will automatically be sent to the Team Leads folder for further processing and approval*

1. From your **My PO Approvals** folder locate the Purchase Order you assigned to yourself. Click on the Purchase Order Number to open it up

[Assign Substitute] Action: Approve [Go]

| My PO Approvals | | | | | | | |
|-----------------|----------------------------|----------|--------------------|-------------------|----------------|---------------|--------------------------|
| Status | No. Of Items: 2 Pending: 2 | | | | | | |
| PO No. | State | Priority | Date/Time | Requisitioner | Supplier | Amount | Select |
| S000034 | Active | Normal | 5/24/2005 10:39 AM | Doris Shimabukuro | Chemicon | 62,500.00 USD | <input type="checkbox"/> |
| S000022 | Notification | Normal | 5/24/2005 8:13 AM | Pamela Croomes | Ted Pella Inc. | 15,000.00 USD | <input type="checkbox"/> |

2. In the **Purchase Order Summary** section of the Purchase Order, complete the following fields with your information by choosing from the list of values (your list of values will contain only those items previously loaded in your Profile): **Purch Agent** (your name), **Position** (your approval limit), and **Phone** (your Caltech phone number)

*NOTE: If you fail to complete the **Position** field with your information, the printed Purchase Order will display the SOS Buyer as the Purchasing Agent for the Order along with their contact information*

Available Actions: Complete Summary Details Approval Status PO History

Purchase Order Summary ?

| Priority | PO/Reference No. | PO Date | Total | Supplier |
|----------|------------------|-----------|---------------|----------|
| Normal | S000034 | 5/24/2005 | 62,500.00 USD | Chemicon |

Supplier Info

Supplier Name: Chemicon

Address: 28820 Single Oak Dr.
Temecula, CA 92590
US

DUNS: 006528558

Phone: +1 (909) 676-8080

Fax: +1 (800) 437-7502

Dept Code:

Purch Agent:

Position:

Phone:

Attachments

| Buyer Info | Bill To Info | Bill To | Ship To Info | Ship To |
|---|--|---------|---|---------|
| Doris Shimabukuro doris.shimabukuro@caltech.edu Phone +1 (626) 395-3652 | California Institute of Technology Payment Services 1200 E California 103-6 Pasadena, CA 91125 United States | | Doris Shimabukuro 391 S Holliston Ave Pasadena, CA 91125 United States | |

3. Click to save your changes

4. From the **Available Actions** list of values, select **Completed** and click **Go**

Available Actions: Complete Summary Details Approval Status PO History

Purchase Order Summary ?

| Priority | PO/Reference No. | PO Date | Total | Supplier |
|----------|------------------|-----------|---------------|----------|
| Normal | S000034 | 5/24/2005 | 62,500.00 USD | Chemicon |

Supplier Info

Supplier Name: Chemicon

Address: 28820 Single Oak Dr.
Temecula, CA 92590
US

DUNS: 006528558

Phone: +1 (909) 676-8080

Fax: +1 (800) 437-7502

Dept Code:

Purch Agent:

Position:

Phone:

Attachments

| Buyer Info | Bill To Info | Bill To | Ship To Info | Ship To |
|---|--|---------|---|---------|
| Doris Shimabukuro doris.shimabukuro@caltech.edu Phone +1 (626) 395-3652 | California Institute of Technology Payment Services 1200 E California 103-6 Pasadena, CA 91125 United States | | Doris Shimabukuro 391 S Holliston Ave Pasadena, CA 91125 United States | |

Modify/Review Purchase Order Details

Before you select **Completed** and click **Go**, you may be required to take some action or make some modifications to the Order

Available Actions

Return Purchase Order to a Shared Folder

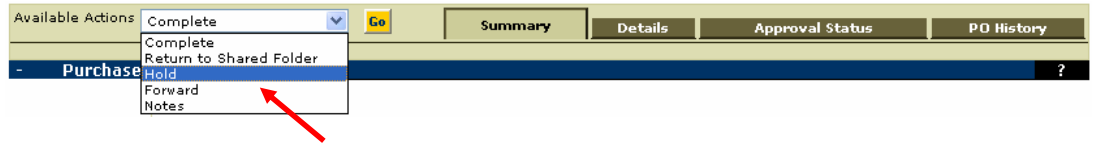
1. With your Purchase Order open, select **Return To Shared Folder** from the **Available Actions** list of values and click **Go**



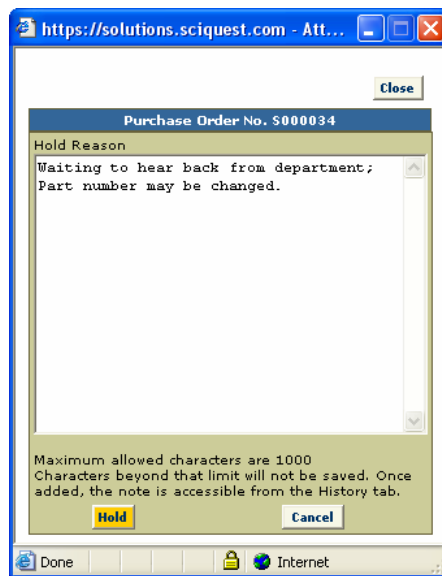
2. The Purchase Order is sent back to your **PPS Buyer** folder

Put a Purchase Order on Hold

1. With your Purchase Order open, select **Hold** from the **Available Actions** list of values and click **Go**



2. In the pop-up window, enter your reason for putting the Purchase Order on hold and click **Hold**



3. The system will take you back to your **My PO Approvals** folder. The Purchase Order will remain on hold until another **Available Action** is chosen

[Assign Substitute] Action: Approve

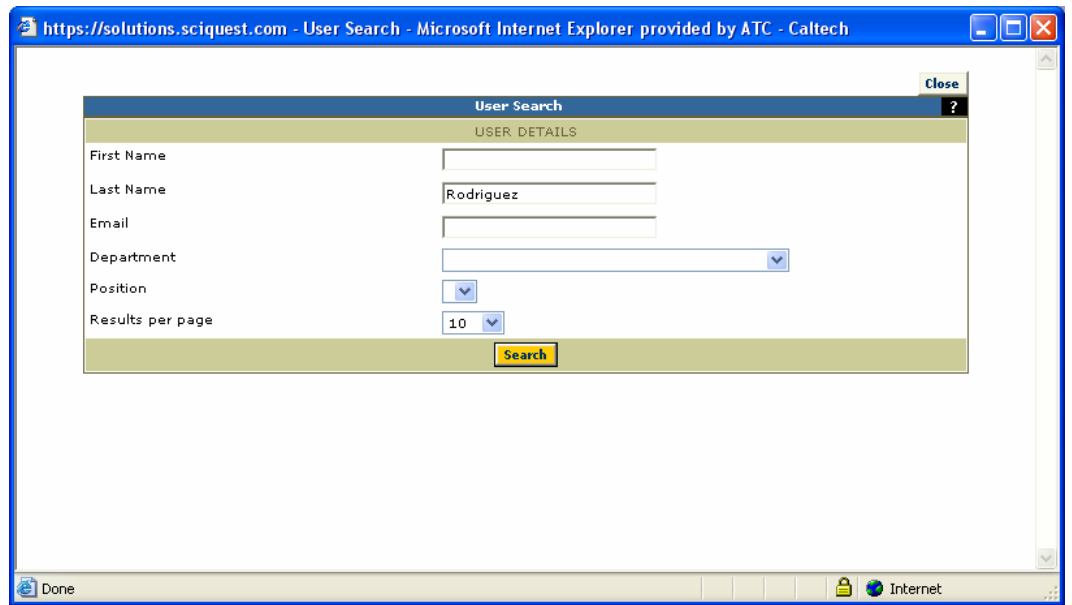
| My PO Approvals | | | | | | | |
|-----------------|--------------|-----------------|--------------------|-------------------|----------------|---------------|--------------------------|
| Status | Pending | No. Of Items: 2 | | Pending: 2 | Page 1 of 1 | | |
| PO No. | State | Priority | Date/Time | Requisitioner | Supplier | Amount | Select |
| S000034 | Hold | Normal | 5/24/2005 10:39 AM | Doris Shimabukuro | Chemicon | 62,500.00 USD | <input type="checkbox"/> |
| S000022 | Notification | Normal | 5/24/2005 8:13 AM | Pamela Croomes | Ted Pella Inc. | 15,000.00 USD | <input type="checkbox"/> |

Forward a Purchase Order

1. With your Purchase Order open, select **Forward** from the **Available Actions** list of values and click **Go**

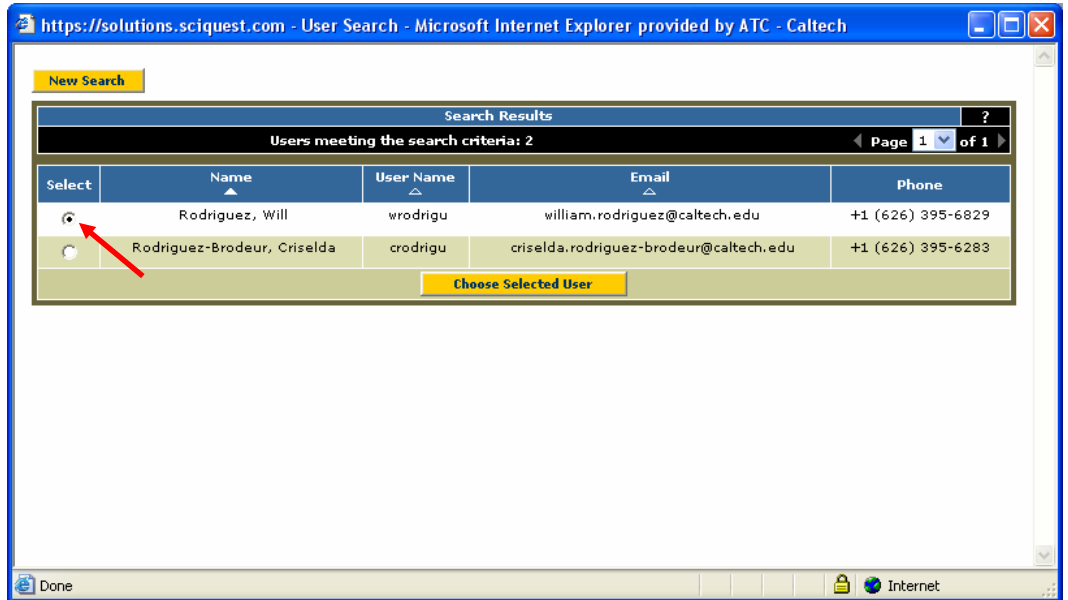


2. In the pop-up window, complete one or more fields and click **Search**. The more fields you complete, the more you will narrow your search results

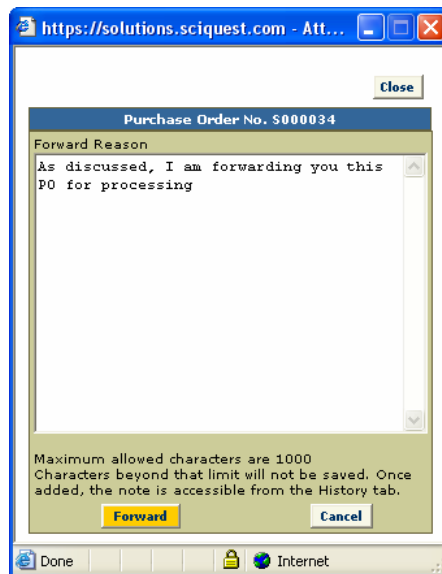


3. In the pop-up window, select a user by clicking on the radio button and click **Choose Selected User**

If your search did not return the results you expected click **New Search** and enter different criteria for your search



4. In the pop-up window, enter a reason for forwarding the Purchase Order and click **Forward**



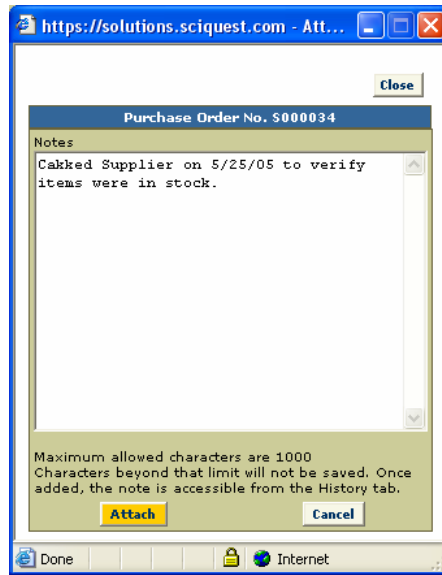
5. The system will take you back to your **My PO Approvals** folder. The Purchase Order will be sent to the new user's **My PO Approvals** folder

Add Notes to a Purchase Order

1. With your Purchase Order open, select **Notes** from the **Available Actions** list of values and click **Go**



2. In the pop-up window, enter your note and click **Attach**



3. Click on the **PO History** tab to view your note

| PO Line No | Date/Time | User | Step(s) | Action | FieldName | From | To |
|------------|--------------------|-------------------|-----------|---------------|--|----------------|-----------------|
| | 5/25/2005 11:28 AM | Monica Marquez | | PO note added | Note : Called Supplier on 5/25/05 to verify items were in stock. | | |
| | 5/25/2005 7:37 AM | Will Rodriguez | | PO Forwarded | Note : Please process this order for me. Thanks | | |
| | 5/24/2005 3:20 PM | Monica Marquez | | PO Forwarded | Note : As discussed, I am forwarding you this PO for processing | | |
| | 5/24/2005 1:29 PM | Monica Marquez | PPS Buyer | PO Hold | Note : Waiting to hear back from department; Part number may be changed. | | |
| | 5/24/2005 1:17 PM | Monica Marquez | | PO Assigned | | | |
| | 5/24/2005 1:14 PM | Monica Marquez | | PO UnAssigned | | | |
| | 5/24/2005 12:41 PM | Monica Marquez | | PO Modified | Custom Field : Position | SOS Buyer 1 | PPS Buyer 4 |
| | 5/24/2005 12:41 PM | Monica Marquez | | PO Modified | Custom Field : Phone | (626) 395-4723 | (626) 395-2566 |
| | 5/24/2005 12:41 PM | Monica Marquez | | PO Modified | Custom Field : Purch Agent | Croomes, Pam | Marquez, Monica |
| | 5/24/2005 11:20 AM | Monica Marquez | PPS Buyer | PO Assigned | | | |
| | 5/24/2005 10:39 AM | Doris Shimabukuro | | PO created | | | |

Summary Tab

Reject Selected Line Items

1. With your Purchase Order open, select a line item on the Purchase Order you want to reject by clicking in the **Select** box for that line. A check mark will appear

| Line No. | Approval Status | Taxable | Product Name | Catalog No. | Unit Price | Qty/UOM | Extended Price | Status | Requisition Number | Select |
|----------|-----------------|---------|--|-------------|------------|---------------|----------------|-----------|--------------------|-------------------------------------|
| 1 | | X | Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes | SCR006 | 125.00 | 500 100/ML | 62,500.00 USD | New Order | 1309103 | <input checked="" type="checkbox"/> |

Shipping, Handling, and Tax charges are calculated and charged by each supplier.

| | | |
|-----------------|-----------|-----|
| Subtotal | 62,500.00 | USD |
| TOTAL | 62,500.00 | USD |

2. From the **Line Item Details** list of values, select **Reject Selected Line Items** and click **Go**

| Line No. | Approval Status | Taxable | Product Name | Catalog No. | Unit Price | Qty/UOM | Extended Price | Status | Requisition Number | Select |
|----------|-----------------|---------|--|-------------|------------|---------------|----------------|-----------|--------------------|-------------------------------------|
| 1 | | X | Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes | SCR006 | 125.00 | 500 100/ML | 62,500.00 USD | New Order | 1309103 | <input checked="" type="checkbox"/> |

Shipping, Handling, and Tax charges are calculated and charged by each supplier.

| | | |
|-----------------|-----------|-----|
| Subtotal | 62,500.00 | USD |
| TOTAL | 62,500.00 | USD |

3. In the pop-up window, enter a reason for rejecting the Purchase Order line(s) and click **Reject Line Item**

Purchase Order No. S000034

Reject PO Line Reason

End User wants to cancel order.

Maximum allowed characters are 1000
Characters beyond that limit will not be saved. Once added, the note is accessible from the History tab.

Reject Line Item Cancel

4. The status icon of a rejected line will change from to

Un-Reject Selected Line Items

1. A Purchase Order line can be un-rejected before it is completed. With your Purchase Order open, select a rejected line item on the Purchase Order you want to un-reject by clicking in the **Select** box for that line. A check mark will appear

| Line No. | Approval Status | Taxable | Product Name | Catalog No. | Unit Price | Qty/UOM | Extended Price | Status | Requisition Number | Select |
|--|-----------------|---------|--|-------------|------------|------------|----------------|-----------|--------------------|-------------------------------------|
| 1 | | X | Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes | SCR006 | 125.00 | 500 100/ML | 62,500.00 USD | New Order | 1309103 | <input checked="" type="checkbox"/> |
| Shipping, Handling, and Tax charges are calculated and charged by each supplier. | | | | | | | | | Subtotal | 62,500.00 USD |
| | | | | | | | | | TOTAL | 62,500.00 USD |

2. From the **Line Item Details** list of values, select **Un-Reject Selected Line Items** and click **Go**

| Line No. | Approval Status | Taxable | Product Name | Catalog No. | Unit Price | Qty/UOM | Extended Price | Status | Requisition Number | Select |
|--|-----------------|---------|--|-------------|------------|------------|----------------|-----------|--------------------|-------------------------------------|
| 1 | | X | Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes | SCR006 | 125.00 | 500 100/ML | 62,500.00 USD | New Order | 1309103 | <input checked="" type="checkbox"/> |
| Shipping, Handling, and Tax charges are calculated and charged by each supplier. | | | | | | | | | Subtotal | 62,500.00 USD |
| | | | | | | | | | TOTAL | 62,500.00 USD |

3. The status icon of an un-rejected line item will change from to

Details Tab

Within the **Details Tab** of a Purchase Order, you can modify the delivery method, tax and equipment screening information, and the POETA at the line level or at the header level, where a single modification can apply to all the lines of the Purchase Order. You may also modify the shipping address at the header level only

*NOTE: To modify Purchase Order details at the **Header Level**, select and click one of the buttons below from the **Edit Details – for all products** section; any changes made will apply to all Purchase Order line items*

| Edit Details - for all products | | |
|---------------------------------|-------------------------------------|--------------|
| Delivery | Supplier & Internal Info | POETA |

*To modify Purchase Order details at the **Line Level** select and click one of the buttons below from the **Line Item Details** section; any changes made will apply only to the line(s) item selected*

| Line Item Details | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|---|-----------------------------|---|-------------|------------|---------------|----------------|-----------|--------------------|--------|----------|--------------------------|--------------------------|-----------------|-------|--|---|-----------------------------|---|--|-------------------------------|--|--|--|--|
| Line No. | Approval Status | Taxable | Product Name | Catalog No. | Unit Price | Qty / UOM | Extended Price | Status | Requisition Number | Select | | | | | | | | | | | | | | | |
| 1 | X | X | Accumax cell detachment solution of proteolytic, collagenolytic and DNase enzymes | SCR006 | 125.00 | 500 100/ML | 62,500.00 USD | New Order | 1300103 | | | | | | | | | | | | | | | | |
| <table border="1"> <thead> <tr> <th>Delivery</th> <th>Supplier & Internal Info</th> <th>Supplier & Internal Info</th> <th>Accounting Info</th> <th>POETA</th> </tr> </thead> <tbody> <tr> <td> Expedite X Ship Via Best Carrier-Best Way Request Delivery </td> <td> Pricing Code Account Code External Note Tax Information Equipment Screening Certification No Attachments </td> <td> Plus Applicable Taxes No </td> <td> Project AB1.00001 Task 1 Award OAID-CITREORCH Expenditure Bank Charges Organization Caltech </td> <td></td> </tr> <tr> <td colspan="5" style="text-align: center;"> TOTAL 62,500.00 USD </td> </tr> </tbody> </table> | | | | | | | | | | | Delivery | Supplier & Internal Info | Supplier & Internal Info | Accounting Info | POETA | Expedite X Ship Via Best Carrier-Best Way Request Delivery | Pricing Code Account Code External Note Tax Information Equipment Screening Certification No Attachments | Plus Applicable Taxes No | Project AB1.00001 Task 1 Award OAID-CITREORCH Expenditure Bank Charges Organization Caltech | | TOTAL 62,500.00 USD | | | | |
| Delivery | Supplier & Internal Info | Supplier & Internal Info | Accounting Info | POETA | | | | | | | | | | | | | | | | | | | | | |
| Expedite X Ship Via Best Carrier-Best Way Request Delivery | Pricing Code Account Code External Note Tax Information Equipment Screening Certification No Attachments | Plus Applicable Taxes No | Project AB1.00001 Task 1 Award OAID-CITREORCH Expenditure Bank Charges Organization Caltech | | | | | | | | | | | | | | | | | | | | | | |
| TOTAL 62,500.00 USD | | | | | | | | | | | | | | | | | | | | | | | | | |

Modify the Shipping Address

1. With your Purchase Order open, click the **Ship To** button to open the **Ship To Info** screen

| Buyer Info | Bill To Info | Bill To | Ship To Info | Ship To |
|---|--|---------|---|----------------|
| Doris Shimabukuro doris.shimabukuro@caltech.edu Phone +1 (626) 395-3652 | California Institute of Technology Payment Services 1200 E California 103-6 Pasadena, CA 91125 United States | | Doris Shimabukuro 391 S Holliston Ave Pasadena, CA 91125 United States | Ship To |

2. In the **Workspace** section, to modify the shipping address, select a new address from the **Select Address** list of values

NOTE: The items loaded in your Addresses profile determine this list of values

Ship To Info Return To Review ?

WORKSPACE
Ship To Info For all products

Select Address:
 CALTECH
 CIT (Squared)
 LIGO-LA

Contact Line 1:

Address Line 1: 391 S Holliston Ave
 City: Pasadena
 State: CA
 Zip Code: 91125
 Country: United States

Save and Apply to Selected Products

- To modify the contact information, complete the **Contact Line 1** field as needed.

Ship To Info Return To Review ?

WORKSPACE
Ship To Info For all products

Select Address:

Contact Line 1: Doris Shimabukuro

Address Line 1: 391 S Holliston Ave
 City: Pasadena
 State: CA
 Zip Code: 91125
 Country: United States

Save and Apply to Selected Products

- Click **Save and Apply to Selected Products** to save your changes
- Click **Return To Review** to return to the **Details Tab** to view the updated information

| Buyer Info | Bill To Info | Ship To Info |
|---|--|---|
| Doris Shimabukuro doris.shimabukuro@caltech.edu Phone +1 (626) 395-3652 | California Institute of Technology Payment Services 1200 E California 103-6 Pasadena, CA 91125 United States | Doris Shimabukuro, Mail Code 1-10 391 S Holliston Ave Pasadena, CA 91125 United States |

Verify the Billing Address

NOTE: Caltech has only one billing address – Payment Services. This address cannot be modified

1. With your Purchase Order open, click the **Bill To** button to open the **Bill To Info** screen
2. Verify the billing address

Bill To Info Return To Review ?

WORKSPACE
Bill To Info From [Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes]

Select Address

| | |
|-----------------------|------------------------------------|
| Contact Line 1 | California Institute of Technology |
| Contact Line 2 | Payment Services |
| Address Line 1 | 1200 E California 103-6 |
| City | Pasadena |
| State | CA |
| Zip Code | 91125 |
| Country | United States |

Save and Apply to Selected Products

3. Click Return To Review to return to the **Details Tab**

Modify the Delivery Method

See My Req Approvals→Details Tab→Modify the Delivery Method (page 24)

Modify the Tax Information

See My Req Approvals→Details Tab→Modify the Tax Information (page 25)

Modify the Equipment Certification Information

See My Req Approvals→Details Tab→Modify the Equipment Certification Information (page 26)

Modify the POETA & Expenditure Type (Split POETA)

See My Req Approvals→Details Tab→Modify the POETA & Expenditure Type (Split POETA) (page 27)

Modify the Purchase Order Supplier Name: New or Unknown Supplier

A Supplier Name may be modified at any point before the Requisition becomes a Purchase Order. If a Purchase Order has already been assigned to a Requisition then the Supplier Name cannot be modified. See *MY Req Approvals*→*Modify/Review Requisition Details*→*Modify the Requisition Supplier Name: New or Unknown Supplier (page 30)*

Non-Catalog Forms

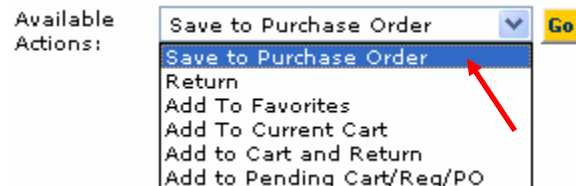
Modify Purchase Order

- **Item Number**
- **Product Name**
- **Quantity**
- **Unit of Measure (UOM)**
- **Unit Price**
- **Amount**

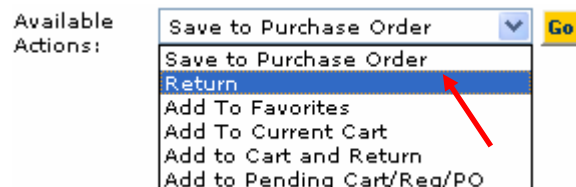
1. With your Purchase Order open, click on the product name to open the Non-Catalog form

| Line Item Details | | | | | | | | | | | |
|-------------------|-----------------|--------------------------|---|-------------|------------|------------|----------------|-----------|--------------------|--------|--|
| Line No. | Approval Status | Taxable | Product Name | Catalog No. | Unit Price | Qty / UOM | Extended Price | Status | Requisition Number | Select | |
| 1 | | <input type="checkbox"/> | Test Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes | Test SCR006 | 200.00 | 1000 50/ML | 200,000.00 USD | New Order | 1309103 | | |

2. Modify the fields of the Non-Catalog form as needed
3. From the **Available Actions** list of values select **Save to Purchase Order** and click **Go**



4. Select **Return** and click **Go**



5. The system will take you back to the Purchase Order. Verify the updated information

6. Click

Attachments

Where to look for Requisition Attachments

Attachments may be found in five areas of a Requisition and are identified with a bullet (•). To view the attachment, simply click on the attachment hyperlink:

- Header Level
 - Internal Info section (1): Viewable by Caltech only
 - Supplier Info section (2): Viewable by Caltech and Supplier
- Line Level (Details Tab)
 - Supplier & Internal Info section (3): Viewable by Caltech and Supplier
 - Internal Info section (4): Viewable by Caltech only
- Non-Catalog Form (click on product name) → Internal Info section (5): Viewable by Caltech only

The screenshot shows a web interface for requisition header information. At the top, there are tabs for 'Summary', 'Details', 'Approval Status', and 'History'. Below the tabs, the page is divided into three main sections: 'General', 'Internal Info', and 'Supplier Info'. In the 'Internal Info' section, there is a red arrow labeled (1) pointing to the 'Internal Link' attachment link. In the 'Supplier Info' section, there is a red arrow labeled (2) pointing to the 'Supplier Info Link' attachment link. The 'Internal Info' section also includes 'Internal Note' and 'Attachments' with a bullet point for 'Internal Link' and a sub-bullet for 'Notes'. The 'Supplier Info' section includes 'Dept Code', 'Purch Agent', 'Position', 'Phone', 'Supplier Note', and 'Attachments' with a bullet point for 'Supplier Info Link' and a sub-bullet for 'Supplier Info Notes'. The 'General' section includes 'Priority', 'Description', 'Prepared by', and 'Requestor'.

| External Purchases | | | | | | | |
|---|---|----------|----------|--|-----------|----------------|--------------------------|
| Status | Product Name | Supplier | Item No. | Unit Price | Qty / UOM | Extended Price | Select |
| | Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes | Chemicon | SCR006 | 10.00 | 5 100/ML | 50.00 | <input type="checkbox"/> |
| Ship To | | | | Bill To | | | |
| Doris Shimabukuro 391 S Holliston Ave Pasadena, CA 91125 United States | | | | California Institute of Technology Payment Services 1200 E California 103-6 Pasadena, CA 91125 United States | | | |
| Delivery | | | | PO Number | | | |
| Expedite X | | | | PO Number To Be Assigned | | | |
| Ship Via Best Carrier-Best Way | | | | Codes POETA | | | |
| Request Delivery | | | | Project AB1.00001 | | | |
| Supplier & Internal Info | | | | L Task 1 | | | |
| Pricing Code | | | | L Award OAID.CITRESRCH | | | |
| Account Code | | | | L Expenditure Bank Charges | | | |
| External Note | | | | Organization Caltech | | | |
| Tax Information | | | | Internal Info | | | |
| Plus Applicable Taxes | | | | Internal Notes | | | |
| Equipment Screening Certification No | | | | Internal Note This is an Internal Note added in the Line Level of Internal Info | | | |
| Attachments | | | | Attachments | | | |
| • Supp. & Int. Info Link | | | | • Internal Info Link | | | |
| • Supp. & Int. Info Attachment | | | | • Internal Info Attachment | | | |

| Internal Info | | | | | | | |
|--|--|-------------|--|----------------------|--|-----|-------------|
| Note to Buyer | <div style="border: 1px solid gray; padding: 5px;"> Please rush! Laboratory experiment pending receipt of items. </div> | | | | | | |
| Help: Please provide any internal attachments below. | | | | | | | |
| Internal Attachments | <div style="border: 1px solid gray; padding: 5px;"> <table border="1"> <thead> <tr> <th colspan="2">Attachments</th> </tr> </thead> <tbody> <tr> <td>Internal Attachments</td> <td> <ul style="list-style-type: none"> • Product Requirement Document • Accumax Data Sheet </td> </tr> <tr> <td>...</td> <td>Attach/Link</td> </tr> </tbody> </table> </div> | Attachments | | Internal Attachments | <ul style="list-style-type: none"> • Product Requirement Document • Accumax Data Sheet | ... | Attach/Link |
| Attachments | | | | | | | |
| Internal Attachments | <ul style="list-style-type: none"> • Product Requirement Document • Accumax Data Sheet | | | | | | |
| ... | Attach/Link | | | | | | |

Where to look for Purchase Order Attachments

Attachments may be found in three areas of a Purchase Order and are identified with a bullet (•). To view the attachment, simply click on the attachment hyperlink:

- Purchase Order Summary → Supplier Info section (1): Viewable by Caltech and Supplier
- Line Item Details (Details Tab) → Supplier & Internal Info section (2): Viewable by Caltech and Supplier
- Non-Catalog Form (click on product name hyperlink to open form) → Internal Info section (3): Viewable by Caltech only

| Purchase Order Summary | | | | | |
|---|---|--|---------------|---|--|
| Priority | PO/Reference No. | PO Date | Total | Supplier | |
| Normal | S000057 | 6/1/2005 | 25,000.00 USD | Western Analytical | |
| Supplier Info | | | | | |
| Supplier Name | Western Analytical | | | Note to Supplier | |
| Address | 37840 Via Majorca Murrieta, CA 92562 US | | | | |
| DUNS | 031067619 | | | | |
| Phone | +1 (800) 541-8421 | | | | |
| Fax | +1 (800) 542-8421 | | | | |
| Dept Code | 8Q | | | | |
| Purch Agent | Marquez, Monica | | | | |
| Position | PPS Buyer 4 -- \$150,000 Limit | | | PPS Buyer 4 | |
| Phone | (626) 395-2566 | | | (626) 395-2566 | |
| Attachments • Supplier Link | | | | | |
| Buyer Info | | Bill To Info | | Ship To Info | |
| Pamela Croomes pamela.croomes@caltech.edu Phone +1 (626) 395-4723 | | California Institute of Technology Payment Services 1200 E California 103-6 Pasadena, CA 91125 United States | | Pam Croomes 391 S Holliston Ave Pasadena, CA 91125 United States | |

| Line Item Details | | | | | | | | | | |
|--------------------------------|-----------------|-----------------------------------|--------------|-------------|--|---------|----------------|---------------------|--------------------|--------------------------|
| Line No. | Approval Status | Taxable | Product Name | Catalog No. | Unit Price | Qty/UOM | Extended Price | Status | Requisition Number | Select |
| 1 | | <input type="checkbox"/> | Widget | 15748 | 250.00 | 100 EA | 25,000.00 USD | New Order | 1326552 | <input type="checkbox"/> |
| Delivery | | Supplier & Internal Info | | | Supplier & Internal Info | | | Accounting Info | | |
| Expedite X | | Pricing Code | | | Project | | | PPL.00001 | | |
| Ship Via Best Carrier-Best Way | | Account Code | | | Task | | | 23 [ELEVATORS] | | |
| Request Delivery | | External Note | | | Award | | | GB.000004 | | |
| | | Tax Information | | | Plus Applicable Taxes | | | Expenditure | | |
| | | Equipment Screening Certification | | | No | | | Facilities Services | | |
| | | Attachments | | | <ul style="list-style-type: none"> • Supplier & Internal Link • Supplier & Internal Attachment | | | Organization | | |
| | | | | | | | | Caltech | | |

Internal Info


Note to Buyer

Note to Buyer: Please rush delivery!

Help: Please provide any internal attachments below.

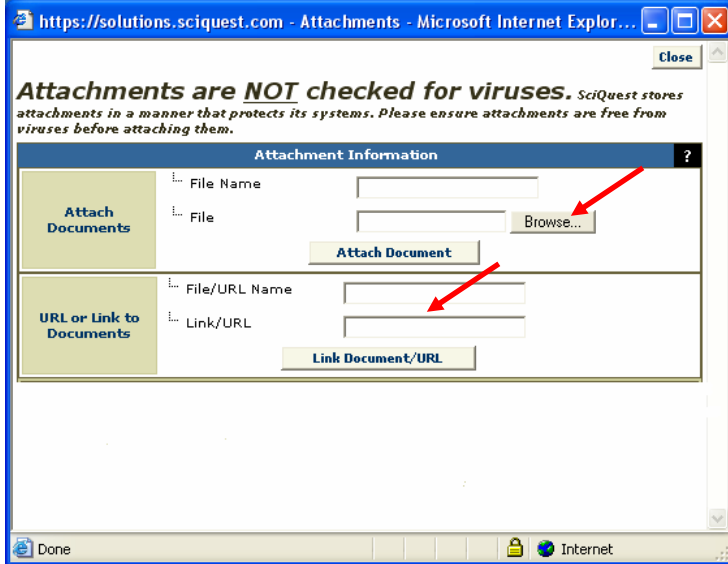
Internal Attachments

| Attachments | |
|----------------------|-----------------------------|
| Internal Attachments | • Product Description |
| ... | Attach/Link |



Add/Remove an Attachment

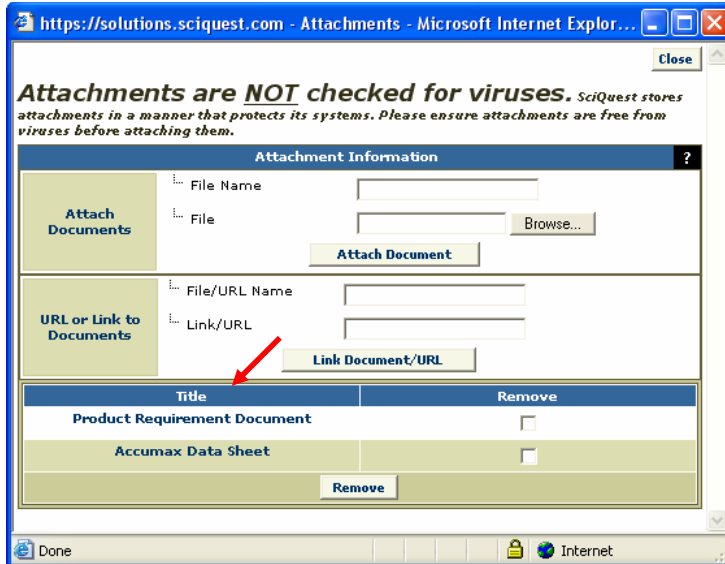
1. With your Requisition or Purchase Order open, select the **Attach/Link** button in the section where you want to add your attachment
2. In the pop-up window, you may attach a document by clicking the **Browse...** button and/or attach a URL or link to a document by entering the URL address in the **Link/URL** field.



3. Name your attachment by completing the **File Name** and **File/URL Name** fields. You may not name two attachments with the same name

4. Click **Attach Document** if you have attached a document.

Click **Link Document/URL** if you have attached a link. Your attachments will appear in the lower half of the pop-up window



5. To remove an attachment select the attachment you want remove by clicking in the **Remove** box for that attachment. Click **Remove**

6. Click **Close**

What Attachments flow to Oracle?

- Internal Attachments do not flow to Oracle and are viewable only in TechMart
- External Attachments do flow into Oracle as an attachment at either the Header or at the Line Level depending on where the Attachment was added in TechMart (Header or Line Level).

NOTE: External Attachments added in TechMart appear only as a URL in Oracle and it is recommended that Attachments be viewed in TechMart rather than Oracle

- Attachments added in a Non-Catalog form do flow into Oracle as an Attachment at the Header Level

Notes

Where to look for Requisition Notes


Notes may be found in five areas of a Requisition and may be identified with a paper icon (📄). To view the note, simply click on the paper icon:

- Header Level
 - Internal Info section (1): Viewable by Caltech only
 - Supplier Info section (2): Viewable by Caltech and Supplier
- Line Level (Details Tab) → Supplier & Internal Info section (3): Viewable by Caltech only
- Non-Catalog Form (click on product name hyperlink to open form)
 - Internal Info section (4): Viewable by Caltech only
 - External Info section (5): Viewable by Caltech and Supplier

| Status | Product Name | Supplier | Item No. | Unit Price | Qty / UOM | Extended Price | Select |
|--------|--|----------|----------|------------|-----------|----------------|--------------------------|
| | Accumax: cell detachment solution of proteolytic, collagenolytic and DNase enzymes | Chemicon | SCR006 | 10.00 | 5 100/ML | 50.00 | <input type="checkbox"/> |

| Internal Info | | | | | | | |
|--|--|-------------|--|-----------------------------|---|-----|--|
| Note to Buyer | <div data-bbox="537 268 1243 411">Please rush! Laboratory experiment pending receipt of items.</div> | | | | | | |
| Help: Please provide any internal attachments below. | | | | | | | |
| Internal Attachments | <table border="1"><thead><tr><th colspan="2">Attachments</th></tr></thead><tbody><tr><td>Internal Attachments</td><td><ul style="list-style-type: none">• Product Requirement Document• Accumax Data Sheet</td></tr><tr><td>...</td><td><input type="button" value="Attach/Link"/></td></tr></tbody></table> | Attachments | | Internal Attachments | <ul style="list-style-type: none">• Product Requirement Document• Accumax Data Sheet | ... | <input type="button" value="Attach/Link"/> |
| Attachments | | | | | | | |
| Internal Attachments | <ul style="list-style-type: none">• Product Requirement Document• Accumax Data Sheet | | | | | | |
| ... | <input type="button" value="Attach/Link"/> | | | | | | |
| External Info | | | | | | | |
| Supplier Instructions | <div data-bbox="537 674 1243 816">Partical Shipments OK.</div> | | | | | | |

Where to look for Purchase Order Notes

Notes may be found in five areas of a Purchase Order and may be identified with a paper icon (). To view the note, simply click on the paper icon:

- Purchase Order Summary → Supplier Info section (1): Viewable by Caltech and Supplier
- Line Item Details (Details Tab) → Supplier & Internal Info section (2): Viewable by Caltech and Supplier
- Non-Catalog Form (click on product name hyperlink to open form)
 - Internal Info section (3): Viewable by Caltech only
 - External Info section (4): Viewable by Caltech and Supplier
- Requisition Notes (click on the Requisition number hyperlink) → Internal Info Section (5): Viewable by Caltech only

| Priority | PO/Reference No. | PO Date | Total | Supplier |
|----------|------------------|----------|---------------|--------------------|
| Normal | S000057 | 6/1/2005 | 25,000.00 USD | Western Analytical |

| Supplier Info | |
|---------------|---|
| Supplier Name | Western Analytical |
| Address | 37840 Via Majorca Murrieta, CA 92562 US |
| DUNS | 031067619 |
| Phone | +1 (800) 541-8421 |
| Fax | +1 (800) 542-8421 |
| Dept Code | 8Q |
| Purch Agent | Marquez, Monica |
| Position | PPS Buyer 4 -- \$150,000 Limit |
| Phone | (626) 395-2566 |

| Buyer Info | Bill To Info | Ship To Info |
|---|--|---|
| Pamela Croomes pamela.croomes@caltech.edu Phone +1 (626) 395-4723 | California Institute of Technology Payment Services 1200 E California 103-6 Pasadena, CA 91125 United States | Pam Croomes 391 S Holliston Ave Pasadena, CA 91125 United States |

| Line No. | Approval Status | Taxable | Product Name | Catalog No. | Unit Price | Qty/UOM | Extended Price | Status | Requisition Number | Select |
|----------|-----------------|---------|--------------|-------------|------------|---------|----------------|-----------|--------------------|--------|
| 1 | | | Widget | 15748 | 250.00 | 100 EA | 25,000.00 USD | New Order | 1326552 | |

| Supplier & Internal Info | Accounting Info |
|--|---|
| Pricing Code Account Code External Note Tax Information Equipment Screening Certification Attachments | Project: PPL.00001 Task: 23 [ELEVATORS] Award: GB.000004 Expenditure: Facilities Services Organization: Caltech |

| TOTAL |
|---------------|
| 25,000.00 USD |

Internal Info

Note to Buyer

Please rush! Laboratory experiment pending receipt of items.

Help: Please provide any internal attachments below.

Internal Attachments

| Attachments | |
|-----------------------------|---|
| Internal Attachments | <ul style="list-style-type: none">• Product Requirement Document• Accumax Data Sheet |
| Attach/Link | |



External Info

Supplier Instructions

Partical Shipments OK.

Available Actions: Completed Go Summary Details Approval Status History

Header Information

| General | | Internal Info | | Supplier Info | |
|-------------|-------------------|---------------|---|---------------|--|
| Priority | Normal | Internal Note |  | Dept Code | 8Q |
| Description | | Attachments | <ul style="list-style-type: none">• Internal Link• Notes | Purch Agent | Marquez, Monica |
| Prepared by | Doris Shimabukuro | | Attach/Link | Position | PPS Buyer 4 -- \$150,000 Limit |
| Requestor | Doris Shimabukuro | | | Phone | (626) 395-2566 |
| | | | | Supplier Note |  |
| | | | | Attachments | <ul style="list-style-type: none">• Supplier Info Link• Supplier Info Notes |
| | | | | | Attach/Link |

What Notes flow to Oracle?

- Internal Notes do not flow to Oracle and are viewable only in TechMart
- External Notes do flow into Oracle as an attachment at either the Header or at the Line Level depending on where the Note was added in TechMart (Header or Line Level).
- Notes added in a Non-Catalog form do flow into Oracle as an attachment at the Header Level

Missing Position/Supplier Folder

What goes into this folder?

The Missing Position/Supplier folder contains Requisitions or Purchase Orders that have at least one of the following:

- The Supplier Name field reads “New Supplier” or “Unknown Supplier”
- The Position field is not complete

Because these are considered incomplete Orders, they are systematically sent to this folder for correction

Who has access to this folder?

Because it is anticipated that very few Orders will ever go into this folder, currently, only two TechMart Analysts have access – Sherri Weed and Suzy Dollar

How do I get my Order out of the Missing Position/Supplier folder?

In order to get your Order out of this folder, a TechMart Analyst will automatically forward your Order to you for correction. No communication is required on your part. You may, however, receive a phone call from a TechMart Analyst who will explain why your Order went to this folder.

Upon receipt of the Order back into your **My Req Approvals/ My PO Approvals** folder, please complete your Order by either updating the **Supplier Name** field with a valid Supplier Name or fill in the **Position** field with your position information

Order Type/PO Delivery

Depending on the Order Type, a Purchase Order may or may not be electronically distributed to the Supplier via fax or email. Below is an Order Type matrix, which defines what Order Types generate Purchase Orders and whether those Purchase Orders are electronically distributed to the Supplier

| Order Type | PO # | PO Distribution |
|--|------|-----------------|
| Spot Buy | ✓ | ✓ |
| <i>Contract Agreements & Change Requests</i> | | |
| Change Request ¹ | ✗ | ✗ |
| Construction ² | ✓ | ✓ |
| LIGO ³ | ✓ | ✗ |
| Research Subcontract ⁴ | ✗ | ✗ |
| <i>Equipment/Leases</i> | | |
| Equipment Loan | ✓ | ✓ |
| Lease Agreement | ✓ | ✓ |
| Maintenance Agreement | ✓ | ✓ |
| Rental Agreement | ✓ | ✓ |
| <i>Services</i> | | |
| Consulting Services | ✓ | ✓ |
| General Services | ✓ | ✓ |
| Temporary Staffing | ✓ | ✓ |
| <i>Unauthorized Orders</i> | | |
| Invoice Attached | ✓ | ✗ |
| Reimbursement | ✓ | ✗ |

¹ **Change Requests:** Buyers will receive requests for change orders via TechMart; however, no Purchase Order will be generated upon completion of the Requisition. Buyers must process the Change Request in Oracle

^{2,3} **Construction and LIGO:** These Orders require you to reference an Oracle Contract Agreement number in the **Supplier & Internal Info** section (see below) of TechMart. This number is required so the Order associates itself with the existing Oracle Contract Agreement when it is loaded in Oracle. If an Oracle Contract Agreement does not exist, you are required to generate this number in Oracle before you issue a TechMart Purchase Order.

NOTE: Oracle Contract Agreement numbers may be pre-loaded in your profile (see Profile→Custom Fields→Supplier→Contract Number)

Supplier & Internal Info Return To Review

WORKSPACE
Supplier & Internal Info For all products

Pricing Code

Account Code

External Note
(Maximum allowed characters are 1000)

Tax Information

Equipment Screening Certification

Work Order

Contract Number

Attachments

⁴ **Research Subcontracts:** Requisitions identified with an Order Type of Research Subcontract will be sent to a **Research Subcontract** folder (which is accessible by selected Contracting Officers only). The Contracting Officers are required to assign themselves Orders belonging to them. Assigned Orders will then flow into the Contracting Officer's **My Req Approvals** folder for processing. No Purchase Order will be generated upon completion of the Requisition. Contracting Officers must process the Research Subcontract in Oracle

NOTE: SciQuest shall use commercially reasonable efforts to ensure that the SciQuest Spend Director and Order Manager Applications deliver ninety-five percent (95%) of all orders submitted to Suppliers within five (5) minutes of final submission and further that ninety-nine percent (99%) of all orders shall be delivered within four (4) hours of final submission ("Order Delivery"). Notwithstanding the foregoing, SciQuest shall not be responsible for any Order Delivery failures that result from: (i) failure of Caltech's hardware or software; (ii) failure of or rejection by intended Supplier's hardware or software; (iii) results from the failure of a communication service or other outside service or equipment not within the control of SciQuest; or (iv) any such failure that is due to reasons beyond the reasonable control of SciQuest.

Order Maintenance

Assign/Un-Assign a Substitute

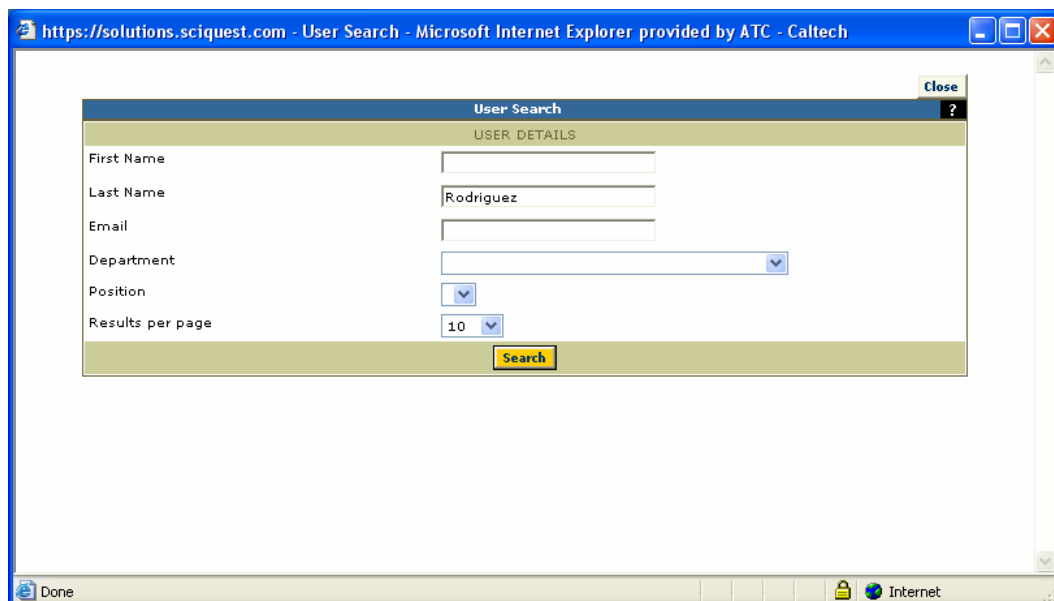
If you anticipate being out of the office you can temporarily assign your future incoming Orders to a backup (substitute) Buyer. Orders currently in your folder will remain in your folder for you to process

1. Open your **My Req Approvals/My PO Approvals** folder
2. Click **[Assign Substitute]** located above your folder



| Requisition No. | State | Priority | PR Date/Time | Requisitioner | Amount | Quick Action |
|-----------------|--------|----------|--------------------|-------------------|---------------|--------------|
| 1325512 | Active | Normal | 6/1/2005 10:50 AM | Doris Shimabukuro | 10,000.00 USD | Approve |
| 1323393 | Active | Normal | 5/31/2005 2:34 PM | Doris Shimabukuro | 1,425.00 USD | Approve |
| 1321214 | Active | Normal | 5/31/2005 9:01 AM | Doris Shimabukuro | 120.00 USD | Approve |
| 1294412 | Active | Normal | 5/17/2005 2:17 PM | Sherri Weed | 10.00 USD | Approve |
| 1294409 | Active | Normal | 5/17/2005 2:16 PM | Sherri Weed | 5.00 USD | Approve |
| 1294379 | Active | Normal | 5/17/2005 2:11 PM | Sherri Weed | 5.00 USD | Approve |
| 1293002 | Hold | Urgent | 5/17/2005 10:41 AM | Doris Shimabukuro | 625.00 USD | Approve |
| 1271513 | Active | Normal | 5/6/2005 2:05 PM | Kimberly R | 40.00 USD | Approve |
| 1271472 | Active | Normal | 5/6/2005 1:57 PM | Monica Marquez | 3,000.00 USD | Approve |
| 1247611 | Active | Normal | 4/27/2005 8:28 AM | Sherri Weed | 295.00 USD | Approve |

3. In the pop-up window, complete one or more fields and click **Search**
The more fields you complete, the more you will narrow your search results



https://solutions.sciquest.com - User Search - Microsoft Internet Explorer provided by ATC - Caltech

User Search [Close] [?]

USER DETAILS

First Name:

Last Name:

Email:

Department:

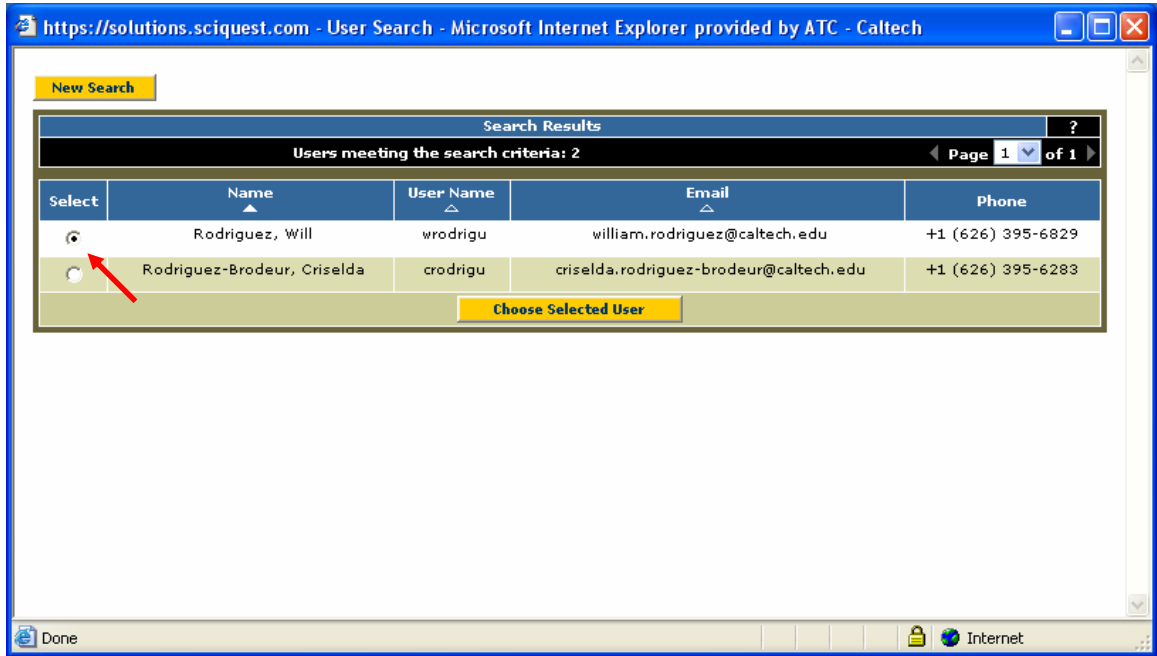
Position:

Results per page:

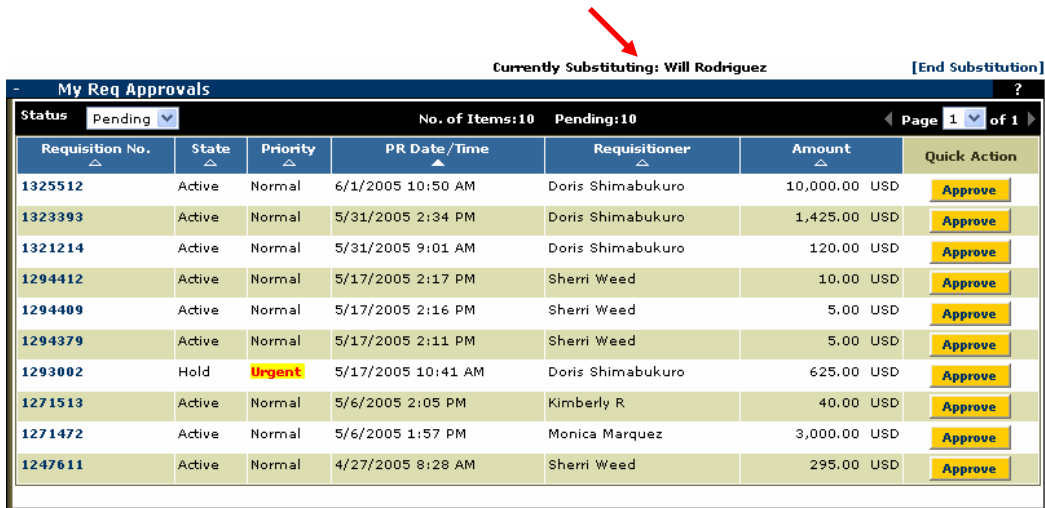
Search

- In the pop-up window, select a user by clicking on the radio button and click **Choose Selected User**

If your search did not return the results you expected click **New Search** and enter different criteria for your search



- The name of your substitute will appear above your folder



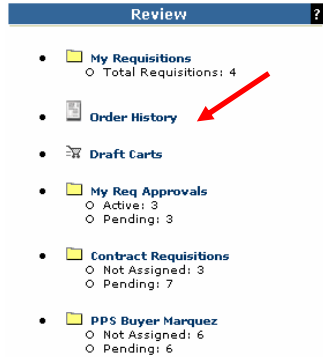
- To end the substitution, click **[End Substitution]** located above your folder

Order History

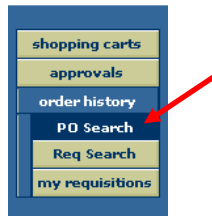
PO and Req Search

By PO Number, Req Number or Supplier/SKU

1. From the Homepage, click **Order History**



2. Verify **PO Search** or **Req Search** is selected (depending on your query)



- Depending on your available search criteria, enter a Purchase Order number in the **by PO. No** tab; a Requisition number in the **by Requisition** tab; or a Supplier Name in the **by Supplier/SKU** tab (available only in a Req Search). Click **Search**

by PO No. **by Requisition** by Supplier/SKU ?

If you know the PO No. of the PO you are searching for, please enter it below.

Purchase Order No.

Filter
Check Filter if you want to use the filters below.

Results per page 20

Search

by PO No. **by Requisition** by Supplier/SKU ?

If you know the Requisition details of the PO you are searching for, please enter it below.

Requisition Name

Requisition No.

Supplier Name **Select Supplier**

Catalog No. (SKU)

Filter
Check Filter if you want to use the filters below.

Results per page 20

Search

by PO No. by Requisition **by Supplier/SKU** ?

If you know the Supplier information of the PO you are searching for, please enter it below.

Supplier Name **Select Supplier**

Catalog No. (SKU)

Filter
Check Filter if you want to use the filters below.

Results per page 20

Search

- Your search results will appear as pictured below. Clicking on the PO No. or Requisition No. hyperlink will take you to those screens and allow you to view order history

New Search Select Query Save Query

PO Search Results ?

Number of POs Matching Search Criteria: 1 Page 1 of 1

| Workflow Status | PO No | Supplier | PO Date/Time | PO Total | Requisition No. | Requisitioner | Supplier Status |
|-----------------|-------------------------|------------------------|-------------------|--------------|-------------------------|--------------------|-----------------|
| ✓ | S000061 | Bachem Bioscience Inc. | 6/3/2005 10:30 AM | 1,425.00 USD | 1323393 | Shimabukuro, Doris | Sent |

Results Page Size 20 Page 1 of 1

Req Search Results ?

Requisition(s) meeting the search criteria: 1 Page 1 of 1

| Status | Requisition No. | Requisition Name | Requisitioner | Requisition Date/Time | Requisition Total |
|--------|-------------------------|------------------------|--------------------|-----------------------|-------------------|
| ✓ | 1323393 | 2005-05-31 dshimabu 01 | Shimabukuro, Doris | 5/31/2005 2:34 PM | 1,425.00 USD |

Results Page Size 100 Page 1 of 1

Filter Search

1. From the **by PO No.** tab, **by Requisition** tab, or the **by Supplier/SKU** tab enter your search criteria and check the **Filter** box to activate the **Filters** and the **PO Status Filters** section

The screenshot shows a web interface for searching Purchase Orders. At the top, there are three tabs: "by PO No.", "by Requisition", and "by Supplier/SKU". The "by PO No." tab is selected. Below the tabs, there is a text input field for "Purchase Order No." containing "S000063". A red arrow points to this field. Below the input field is a "Filter" checkbox which is checked. Underneath, there is a "Results per page" dropdown menu set to "20". A yellow "Search" button is located below these fields. The interface then displays a "Filters" section with instructions: "To find your purchase documents quickly and easily, choose a date range to search for purchase documents placed during a specified time frame." There are radio buttons for "My Orders" and "Company Orders", with "Company Orders" selected. Below this are "Start Date" and "End Date" fields, both set to "6/1/2005" and "6/3/2005" respectively. A "User" field with a "Select User" button is also present. The "Filters" section includes two lists: "PO Departments" (Administrative Leave of Absence, Aeronautics, Alumni, Applied and Computational Math, Applied Mechanics) and "Only Include PO's From These Departments" (with a "Show All" button). Below this is the "PO Status Filters" section, which includes a list of statuses (Workflow, Pending, Rejected, Partially Rejected, Complete, Supplier, Sent to Supplier, Supplier Processing, Back Order, Shipped) and an "Include PO's With Any of These Statuses" section (with a "Show All" button). A final yellow "Search" button is at the bottom of the filter section.

2. Refine your query by
 - Start and End Date
 - PO Departments
 - PO Status
3. Click **Search**

Save a Query

1. From the **by PO No.** tab, **by Requisition** tab, or the **by Supplier/SKU** tab enter your search criteria and check the **Filter** box to activate the **Filters** and the **PO Status Filters** section
2. Refine your query you want to save

by PO No. | by Requisition | **by Supplier/SKU** ?

If you know the Supplier information of the PO you are searching for, please enter it below.

Supplier Name

Catalog No. (SKU)

Filter
Check Filter if you want to use the filters below.

Results per page 20

Filters

To find your purchase documents quickly and easily, choose a date range to search for purchase documents placed during a specified time frame.

My Orders Company Orders

Start Date (MM/DD/YYYY)

End Date (MM/DD/YYYY)

User

PO Departments

- ASCIT-Associated Students of Caltech
- ATC Management
- ATC Systems Analysis
- ATC Telecommunications
- Administrative Leave of Absence

Only Include PO's From These Departments

- ATC Administration
- ATC CARE
- ATC Development
- ATC Infrastructure
- Aeronautics

PO Status Filters


PO Status

- Supplier-----
- Back Order
- Shipped


Include PO's With Any of These Statuses

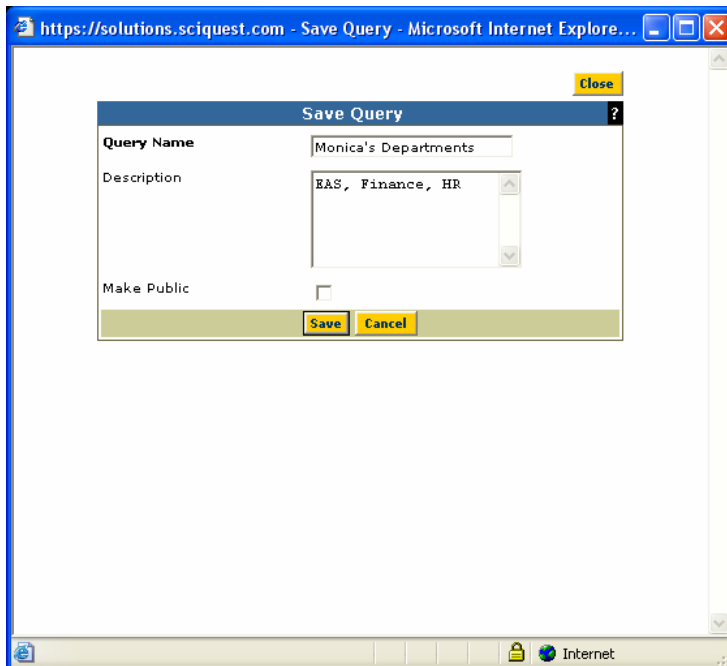
- Workflow-----
- Pending
- Rejected
- Partially Rejected
- Complete
- Supplier-----
- Sent to Supplier
- Supplier Processing

3. Click

4. From the search results screen select 

| PO Search Results | | | | | | | |
|---|---------|-------------------------------|--------------------|----------------|-----------------|--------------------|-----------------|
| Number of POs Matching Search Criteria: 285 | | | | | | | |
| Page 1 of 15 | | | | | | | |
| Workflow Status | PO No. | Supplier | PO Date/Time | PO Total | Requisition No. | Requisitioner | Supplier Status |
| ✓ | 5000062 | Grainger, Inc. | 6/3/2005 10:31 AM | 120.00 USD | 1321214 | Shimabukuro, Doris | Sent |
| ✓ | 5000061 | Bachem Bioscience Inc. | 6/3/2005 10:30 AM | 1,425.00 USD | 1323393 | Shimabukuro, Doris | Sent |
| ✓ | 5000043 | VWR International | 5/26/2005 8:52 AM | 51.79 USD | 1315179 | Shimabukuro, Doris | Sent |
| ↻ | 5000034 | Chemicon | 5/24/2005 10:39 AM | 62,500.00 USD | 1309103 | Shimabukuro, Doris | |
| ✓ | 5000017 | 1ST Chemistry.com | 5/23/2005 8:16 AM | 100.00 USD | 1305058 | Shimabukuro, Doris | Sent |
| ↻ | 464694 | Pierce Biotechnology, Inc. | 5/16/2005 8:25 AM | 100,000.00 USD | 1288998 | Shimabukuro, Doris | |
| ✓ | 464065 | Upchurch Scientific | 5/13/2005 2:36 PM | 9.00 USD | 1287600 | Carchi, Edward | Sent |
| ✓ | 463894 | Unknown Supplier | 5/13/2005 1:51 PM | 55,000.00 USD | 1271770 | Carchi, Edward | Sent |
| ✓ | 463961 | Applied Biosystems Group | 5/13/2005 1:50 PM | 1,793.52 USD | 1287594 | Carchi, Edward | Sent |
| ✓ | 463960 | Fisher Scientific Company LLC | 5/13/2005 1:50 PM | 6,279.22 USD | 1287594 | Carchi, Edward | Sent |
| ✓ | 463916 | CDWG | 5/13/2005 1:50 PM | 52.81 USD | 1287594 | Carchi, Edward | Sent |

5. In the pop-up window, name your search in the **Query Name** field and give it a description. Click 

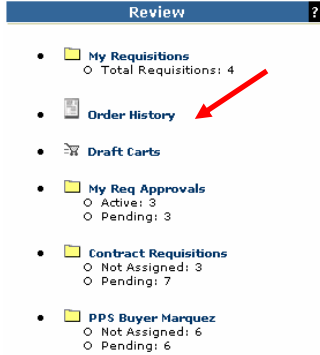


6. The system will display the following message. Click **Close**



Select a Query

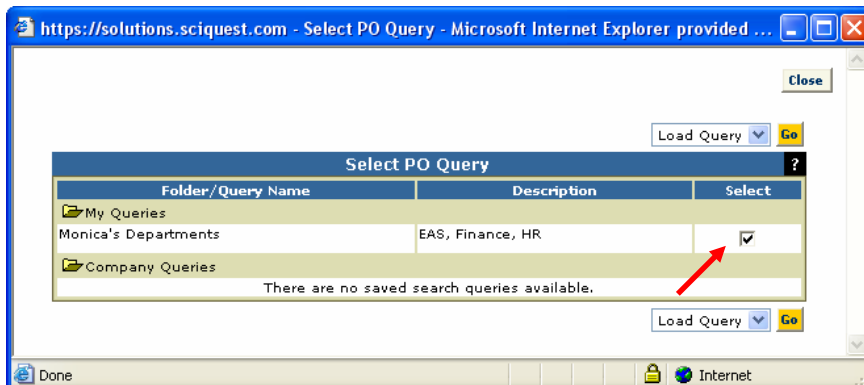
1. From the Homepage, click **Order History**



2. Verify **PO Search** or **Req Search** is selected (this will depend on where your query is saved)



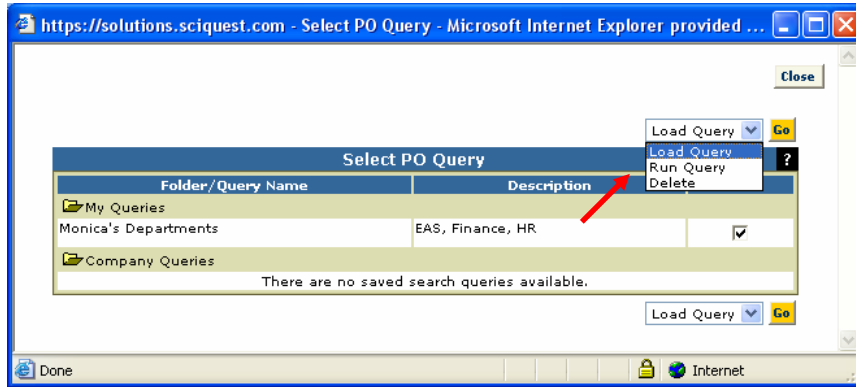
3. Select **Select Query**
4. In the pop-up window, select the query you want to run by clicking in the Select box for that query. A checkmark will appear



- From the list of values, select **Load Query** or **Run Query** and click **Go**

Load Query: Allows you to modify the existing criteria of your saved query before you run it

Run Query: Allows you to obtain a report based on the existing criteria of your saved query



- To delete an existing Query, select **Delete** from the list of values and click **Go**

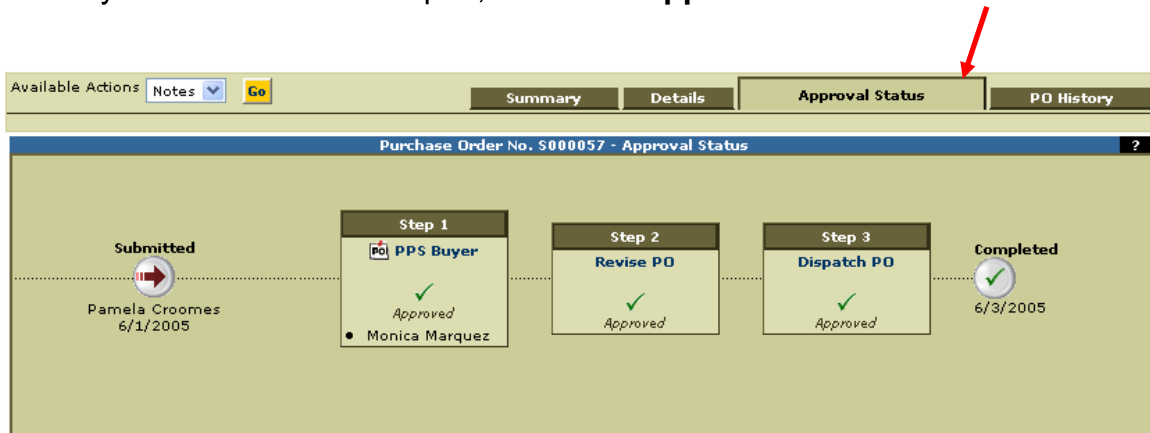
Approval Status

You may review the approval status of a Purchase Order at any time during the approval cycle.

1. Using **Order History**, search for a Purchase Order using the Purchase Order or Requisition Number
2. Click on the Purchase Order number hyperlink

| Workflow Status | PO No | Supplier | PO Date/Time | PO Total | Requisition No. | Requisitioner | Supplier Status |
|-----------------|---------|--------------------|------------------|----------------|-----------------|-----------------|-----------------|
| ✓ | S000057 | Western Analytical | 6/1/2005 1:24 PM | 250,000.00 USD | 1326552 | Croomes, Pamela | Sent |


3. With your Purchase Order open, select the **Approval Status** tab



The Approval Status of every order may vary. Located on the left menu bar is a **Legend** to help you identify the status of a step and where the Order may be located

| LEGEND | |
|--------|----------------------------|
| ✓ | Approved Line Item |
| 🔄 | Pending Line Item |
| ✗ | Rejected Line Item |
| 🔄✗ | Pending Rejected Line Item |

Printing

Requisitions and Purchase Orders may be printed at any time when the following icon is present . Search for a Requisition or Purchase Order using PO or Requisition Search

Purchase Orders printed from the **Summary** tab of a Purchase Order will print high level information

| Purchase Order Summary | | | | | | | | | |
|--|--|----------|--|--------------|------------------|---|----------------|--------------------------------|--------------------|
| Priority | PO/Reference No. | PO Date | Total | | Supplier | | | | |
| Normal | S000062 | 6/3/2005 | 120.00 | USD | Grainger, Inc. | | | | |
| Supplier Info | | | | | | | | | |
| Supplier Name | Grainger, Inc. | | | | Note to Supplier | Note not attached | | | |
| Address | 100 Grainger Parkway Lake Forest, IL 60045-5201 US | | | | | | | | |
| DUNS | 005103494 | | | | | | | | |
| Phone | +1 (877) 202-2592 ext.1 | | | | | | | | |
| Fax | +1 (877) 202-2587 | | | | | | | | |
| Dept Code | 8Q | | | | | | | | |
| Purch Agent | Marquez, Monica | | | | | | | | |
| Position | PPS Buyer 4 | | | | | | | | |
| Phone | (626) 395-2566 | | | | | | | | |
| Requestor | | | | | | | | | |
| Attachments | | | | | | | | | |
| Buyer Info | | | Bill To Info | | | Ship To Info | | | |
| Doris Shimabukuro doris.shimabukuro@caltech.edu Phone +1 (626) 395-3652 | | | California Institute of Technology Payment Services 1200 E California 103-6 Pasadena, CA 91125 United States | | | Doris Shimabukuro 391 S Holliston Ave Pasadena, CA 91125 United States | | | |
| Line Item Details | | | | | | | | | |
| Line No. | Approval Status | Taxable | Product Name | Catalog No. | Unit Price | Qty/UOM | Extended Price | Status | Requisition Number |
| 1 | ✓ | No | Test Delux Widget | Test 2345-XC | 30.00 | 4 EA | 120.00 USD | Sent To Supplier (6/3/2005) | 1321214 |
| Shipping, Handling, and Tax charges are calculated and charged by each supplier. | | | | | | | | Subtotal | 120.00 USD |
| | | | | | | | | TOTAL | 120.00 USD |

Purchase Orders printed from the **Details** tab of a Purchase Order will print low level information (i.e. Delivery Method, POETA, and Expenditure Type)

NOTE: Purchase Orders sent to Suppliers will be similar the one pictured below, however they will not contain Accounting Information

| Purchase Order Summary | | | | | | | | | |
|--|--|----------|--|-----------------------|-------------------|---|----------------|--------------------------------|--------------------|
| Priority | PO/Reference No. | PO Date | Total | | Supplier | | | | |
| Normal | 8000062 | 6/3/2005 | 120.00 | USD | Grainger, Inc. | | | | |
| Supplier Info | | | | | | | | | |
| Supplier Name | Grainger, Inc. | | Note to Supplier | | Note not attached | | | | |
| Address | 100 Grainger Parkway Lake Forest, IL 60045-5201 US | | | | | | | | |
| DUNS | 005103494 | | | | | | | | |
| Phone | +1 (877) 202-2592 ext.1 | | | | | | | | |
| Fax | +1 (877) 202-2587 | | | | | | | | |
| Dept Code | 8Q | | | | | | | | |
| Purch Agent | Marquez, Monica | | | | | | | | |
| Position | PPS Buyer 4 | | | | | | | | |
| Phone | (626) 395-2566 | | | | | | | | |
| Requestor | | | | | | | | | |
| Attachments | | | | | | | | | |
| Buyer Info | | | Bill To Info | | | Ship To Info | | | |
| Doris Shimabukuro doris.shimabukuro@caltech.edu Phone +1 (626) 395-3652 | | | California Institute of Technology Payment Services 1200 E California 103-6 Pasadena, CA 91125 United States | | | Doris Shimabukuro 391 S Holliston Ave Pasadena, CA 91125 United States | | | |
| Line Item Details | | | | | | | | | |
| Line No. | Approval Status | Taxable | Product Name | Catalog No. | Unit Price | Qty/UOM | Extended Price | Status | Requisition Number |
| 1 | ✓ | No | Test Delux Widget | Test 2345-XC | 30.00 | 4 EA | 120.00 USD | Sent To Supplier (6/3/2005) | 1321214 |
| Delivery | | | Supplier & Internal Info | | | Accounting Info | | | |
| Expedite | No | | Pricing Code | | | Project | AB1.00001 | | |
| Ship Via | Best Carrier-Best Way | | Account Code | | | Task | 1 | | |
| Request | | | External Note | | | Award | OAID.CITRESRCH | | |
| Delivery | | | Tax Information | Plus Applicable Taxes | | Expenditure | Bank Charges | | |
| | | | Equipment Screening Certification | No | | Organization | Caltech | | |
| | | | Attachments | | | | | | |
| TOTAL | | | | | | | 120.00 USD | | |
| Shipping, Handling, and Tax charges are calculated and charged by each supplier. | | | | | | | | Subtotal | 120.00 USD |
| | | | | | | | | TOTAL | 120.00 USD |