

TechMart Definitions

Add Products

Add Products

Selecting this button allows you to add products to the Requisition.

Addresses

Multiple addresses are stored in TechMart. Most are stored in a List of Values (LOV) to provide consistency. Addresses may be selected from the LOV to store in an individual's profile. These addresses are then available for use when using TechMart. List of Values are maintained by the TechMart Administrators.

Bill to Address

The address to which invoices should be sent. This address defaults to Payment Services.

Delivery Address

Caltech will continue to use the internal Department Code List to direct deliveries. Delivery addresses are associated with each Department Code. Caltech Shipping & Receiving and Mail Services will continue to use this list to route deliveries for shipments they receive. The list is posted on the Procurements Services website.

TechMart delivery information will default from your Profile. However, changes can be made that are specific to an individual Requisition. This section is available during the Review Step of the Requisition process. By selecting Delivery from the Edit Details Section, an Edit Workspace will open. Here you can check the Expedite box, change the Ship Via selection, and add a date for Req (Requisition) Delivery.

Ship to Address

The Caltech address to which a Supplier ships. The List of Values contains Ship to Addresses for common Caltech sites. In order for Purchase Orders to interface from TechMart to Oracle correctly, Ship to Addresses must be in sync. Additions or corrections to Ship to Addresses are done by the TechMart Administrators and require the approval of the Associate Director of Purchasing Services.

Approval Cycle

The approval cycle refers to the multiple steps of approval for Requisitions and Purchase Orders. These steps will differ depending on a user's permissions and approval limits. User permissions and limits are set by the user's division or department and communicated to the TechMart Administrators.

Approver

A person with the authority to verify that the contents of a Requisition or Purchase Order are correct and representative of an appropriate Institute expenditure.

Attachment

Attach/Link

Additional descriptive documentation that is electronically associated with a Requisition and/or Purchase Order. Documents can be scanned or may take the form of a URL. They can be routed through the Requisition/Approval/PO process.

If the Requisition Preparer does not have the technical resources to electronically attach, the information can be Faxed to a Purchasing Agent's E-Fax number. If a Fax machine is not readily available, the Preparer should write the Requisition Number on the

information and mail it to Purchasing Services. Whenever possible, Purchasing Services will take advantage of this technology and will attach all pertinent information electronically.

Limitations may exist for external attachments. Caltech will deliver Purchase Orders to Suppliers via FAX or Email.

For Suppliers receiving Purchase Orders via FAX, only the following file types can be sent. TIF, GIF, JPG, PDF(v7), HTML, RTF, XLS(v2003), DOC(v2003), PPT(v2003), and VSD(v5). *Note: MSG files cannot be sent via fax and will cause a delivery failure.*

For Suppliers receiving Purchase Orders via E-mail, there may be some limits on file size or type.

Note: Document attachments will not flow into Oracle. To see an electronic attachment, user must go to TechMart.

Category

The term used to group items with similar characteristics. Examples of some categories used in TechMart are: Biochemical Compounds, Computer Products, Laboratory Equipment, Publications. Each of these broad categories has additional subcategories. Using these categories can help refine a search for products.

Catalog

In this context, the term catalog refers to items offered for sale by various different Suppliers. The TechMart online catalog contains products, descriptions, and negotiated Caltech pricing. There are currently 50 Catalog Suppliers. ***Note: this figure is expected to change as more contracts are negotiated.***

Hosted Catalog

This term refers to the Suppliers who have elected to provide their electronic catalog in TechMart. Suppliers have negotiated prices and terms that are advantageous to Caltech and electronically supplied their product information.

Punchout Catalog

Suppliers the have provided a special link to their online catalog. This Punchout link accesses the Supplier's site that contains Caltech pricing and interfaces orders back into the TechMart system.

Non-Catalog

All products not contained in either the Hosted or Punchout Catalogs are Non-Catalog orders. This could be because the Supplier has elected not to participate, is not technically capable of supplying data, or the volume does not warrant inclusion. Requisitions to Non-Catalog Suppliers are initiated through TechMart and are electronically routed for approval and then on to either an SOS Buyer or a Purchasing Services Agent to be placed with the Supplier.

Department Code

A code used at Caltech to identify purchasing and payment transactions by campus groups. A Department Code list is maintained by Procurement Services and posted to their website. It is used to provide contact information and to route deliveries.

E-Fax

All Procurement Services Purchasing Agents have E-Fax numbers. This allows the sender of the Fax to use a regular Fax machine to transmit. The Purchasing Agent receives it as an email message. It can then be converted to a format suitable to electronically attach or be printed, as needed. A list of the E-Fax numbers for Purchasing Agents is under Resources.

Empty Cart

Selecting this button allows you to remove all items in the shopping cart.

Fast Order Search



A quick search method for locating an item in a catalog with a known catalog number. The search will return all results that contain the Catalog Number you enter (the same numbering sequence may be used by multiple Suppliers).

Favorites



A place to store frequently ordered items. The TechMart User can use this option to save frequently order products to minimize searching and data entry.

Financial Approver

This is the title given to the person who is designated to approve Requisitions that are above the Requisitioner's approval limit. Approval limits and Financial Approvers are setup by the TechMart Administrators at the direction of divisions or departments.

Forms



When the TechMart menu bar Search Tools is selected, there is a tab entitled Forms. This tab is divided into two sections:

My Forms

A storage area to hold Non-Catalog form(s) that a user has saved to Favorites

Caltech Non-Catalog Forms

A storage area to hold forms developed by Purchasing Services to be used to Requisition certain types of goods or services. The forms have fields to collect the appropriate data for processing each order type.

Organization Forms

The title of the folder to hold the Caltech Non-Catalog Forms. If this folder is collapsed, click on it to display the individual forms.

Spot Buy

This form is used to initiate a new Requisition for goods that are not contained in one of the TechMart catalogs.

Contract Agreements and Change Requests

The title of the folder containing forms to process requisitions for Change Orders, Construction, LIGO, or Research Subcontracts.

Change Request

Form used to process a Requisition to make changes to an existing Purchase Order. This form is used for each change to

an existing Purchase Order that amends the terms of the contract. Examples: Extend dates or to add or delete items. This is the form to use regardless of the order type of the original Requisition. Examples: LIGO, Equipment Least, Spot Buy, etc.

Note: You use this form to make a change to any existing PO, regardless of the original order type.

Construction

Form used to initiate a new Requisition for some type of construction

LIGO

Form used to initiate a new Requisition to purchase things for LIGO, it contains fields for information unique to LIGO projects

Research Subcontract

Form used to initiate a new Research Subcontract between the Institute and another organization

Equipment/Leases

The title of the folder containing forms to process requisitions for Equipment Loans, Lease Agreements, Maintenance Agreements, and Rental Agreements.

Equipment Loan

The Institute is required to account for all items of Equipment located on Caltech sites, regardless of ownership. Use this form to initiate a Requisition for a new Equipment Loan. Information regarding the terms of the loan and the location of the Equipment are necessary to protect all parties.

Lease Agreement

Form used to setup a new lease. There are differences between Capital and Operating leases that impact title, Expenditure Type, taxability, and reporting. Consult with a Purchasing Services representative for guidance on lease types.

Maintenance Agreement

Form used to setup a new maintenance agreement. Taxability of maintenance agreements depends on terms of agreement. Consult with a Purchasing Services representative for guidance on maintenance agreement taxability.

Rental Agreement

Form used to setup a new rental agreement.

Services

The title of the folder containing forms to process requisitions for Consulting, General, or Temporary Services.

Consulting Services

Form used to initiate a new Requisition for Consulting or Professional Services. Consulting Services are performed by independent contractors who are in the business of rendering such services and may include partnerships, firms or

corporations, as well as individuals. Example: Medicine and medical arts, architectural and engineering services, management and systems consultation, accounting services, or research. Additional forms are required for these Requisitions; see the Procurement Services website for the Consulting & Professional Services Worksheet and the Independent Contractor Services Request.

General Services

Form used to initiate a new request for a non-professional service. This form should be used for repairs to equipment, maintenance, and other services where no maintenance agreement is in effect, such as pool service, pest control, instrument calibration, etc.

Temporary Services

Form used to request new temporary staffing. This form should be used to contract with an established agency and not individuals. *Note: Caltech Human Resources maintains contracts with several agencies that provide temporary staffing for campus.*

Unauthorized Orders

The title of the folder containing forms to process Invoice Attached orders and Reimbursements that require a Requisition. The requisitioning process is the Institute's auditor-approved procedure for the requesting of goods or services prior to purchase. When purchases are made outside of the official system, they are processed "after the fact" and are considered Unauthorized. If a division or department chooses to pay for such transactions, they need to be entered into the Institute's financial system using one of the following:

Invoice Attached

Form used to process orders when an individual has purchased something from a Supplier and had the Supplier invoice the Institute. The invoice should be scanned and electronically attached or E-Faxed to a Purchasing Agent. If technology is not available to electronically attached, write Requisition Number on the Invoice, write OK to Pay, and mail to Purchasing Services.

Reimbursement

Form used to pay back an individual who has purchased something on behalf of Caltech using his or her own personal funds or credit card. This form is used when the original transaction would have required use of a purchase requisition. Proof of payment must be attached. The receipts should be scanned and electronically attached or E-Faxed to a Purchasing Agent. If technology is not available to electronically attached, write Requisition Number on the proof of payment receipts, and mail to Purchasing Services.

Health and Safety checkboxes and flags (icons)

Some products have health and safety regulations associated with their purchase. SciQuest provides a way for Suppliers to associate a "flag" with a product. If the Supplier provides flags as part of their catalog data to SciQuest, an icon will be displayed to the buying organization as a quick visual tag. Additionally, this flag can be used in workflow

to ensure that a requisition with such flagged products can be directed appropriately. Caltech has special procedures for three of these sensitive product categories. When a Catalog order is selected, it may have one of these icons designated. When placing a Non-Catalog order, the Preparer is asked to check an appropriate box.

Controlled Substance

A drug or chemical substance whose possession and use are controlled by law. Refer to the Purchasing Services website for the Controlled Substance Procedure Memoranda.

Radioactive

Substances that have a radionuclide in their structure. Such 'radiolabeled' substances have radioactivity associated with them that require end users to have specific radioactive material handling licenses. *The Caltech Safety Office is notified via a system generated email of radioactive orders.*

Radioactive Minor

Materials that have minute amounts of radioactivity and typically do not require a specific radioactive material handling licenses. *The Caltech Safety Office is notified via a system generated email of radioactive orders.*

Additional flags

SciQuest provides additional flags to Suppliers that may display on Catalog products. Caltech has no current special process for such products. A full list of the SciQuest Product Flags is provided in Resources.

Item Description

A detailed description of an item, service or repair.

Item Number

Enter the number the Supplier uses for identification of the product. The terms Stock No., Part No., or some similar description may be used. Numbers and letters can be entered in this field. If item number is unknown or the Supplier doesn't use one, enter Unknown or N/A (required field, must be a minimum of three characters.)

Limits

Limits are boundaries set in the system to control procurement activity. They are set by the TechMart Administrators at the direction of the division or department.

Requisition Limit

The limit up to which an individual can requisition without obtaining additional approval. Caltech has made the business decision that the limit for the Requisition Line is the same as the limit for the Requisition.

Approval Limit

The limit up to which an individual with the role of Requisition Approver can approve a Requisition. Caltech has made the business decision that the limit for the Requisition Line is the same as the limit for the Requisition.

Purchase Order Limit

The limit up to which an individual with the role of SOS Buyer or Purchasing Agent can create a Purchase Order without additional approval. Caltech has made the business decision that the limit for the Purchase Order Line is the same as the limit for the Purchase Order.

Purchase Order Approval Limit

The limit up to which an individual with the role of Purchase Order Approver can approve a Purchase Order. Caltech has made the business decision that the limit for the Purchase Order Line is the same as the limit for the Purchase Order.

Limited Purchase Order
Not used at Caltech

List of Values (LOV)

This term is used to describe a pre-populated list from which a user can choose.

Mixed Cart

In TechMart, this refers to a shopping cart that contains items that are mixed between Catalog and Non-Catalog. In most cases, there is no problem with these orders.

However, there are four exceptions:

- Invoice Attached
- Reimbursement
- LIGO
- Research Subcontracts

MRO

Maintenance, repair, and operations. A term often used to describe products such as office supplies, travel services, or computers, needed to run a business, but not necessarily central to a business' output. Common term used in manufacturing and by Suppliers.

Notes

External Notes

Notes intended to be viewed outside of Caltech.

Example:

Note to Supplier

Additional information or special instructions about the Requisition that needs to be brought to the attention of the Supplier. This information will be on the Purchase Order that is transmitted to the Supplier via FAX or email.

Internal Notes

Notes for informational purposes, intended to be viewed only within the Institute.

Examples:

Note to Approver

Additional information or special instructions about the Requisition that needs to be brought to the attention of the Approver.

Note to Buyer

Additional information or special instructions about the Requisition that needs to be brought to the attention of the Buyer.

Notification

Messages generated by the system to notify an individual of an action **To Do** or that an action has been completed (**FYI**). (You can choose from the available notifications which messages you want to receive in the Email Preferences section of your Profile.)

Examples: Approvers can be notified when there are Requisitions to approve, when a Requisition or a line on a Requisition has been rejected, and when a PO has been sent to the Supplier, etc.

Payment

There are **no changes to the way we make payment associated with TechMart**. Invoices will continue to be processed as they are now.

Payment Request

The rules for Payment Requests **have not changed**. If a purchase is on the Payment Request Usage list, process a paper Payment Request.

Place Order

Selecting this button enters the Requisition into the Approval Cycle

Product Search

This is the TechMart function that provides the capability to search and compare products before buying. The comparison function is only available for products contained in Hosted Catalogs.

Profile

Information specific to a particular user of TechMart. Includes, but is not limited to, User Identification, Personal Settings, Roles, Permissions, Addresses, and Financial Approvers.

Purchase Order

Document sent electronically, via fax or email to the Supplier to fulfill a Requisition. Each Purchase Order is given a unique number and is a contract from the Institute to the Supplier for the purpose of acquiring the specified goods or services from that Supplier. Purchase Orders will be generated and routed to the Supplier from TechMart. They will interface into Oracle with a nightly update and will encumber funds upon import.

Changes to existing Purchase Orders must be done in Oracle. Request a change to a Purchase Order using the Change Order from the TechMart Search Tools/Forms/Organization Forms section.

Purchasing Agent

A Purchasing Services employee who is assigned to make purchases, assigned to divisions or departments.

Record Retention

TechMart will become the official record of all purchases made through the purchasing system, effective June 20, 2005). Purchase Orders will be delivered to Suppliers electronically via FAX or Email and there will no longer be a need for printed Purchase Orders. Divisions and departments are welcome to print and file paper copies of their orders, but are not required to do so. Currently, TechMart is capable of storing all of our purchasing history indefinitely. Once we reach a point where archiving is necessary, the strategies for storing data will be discussed with campus.

Requestor

The Requestor is the person who actually wants/needs the goods or services being purchased, i.e. the end user. The Requestor and the Requisition Preparer can be the same person, if applicable.

Requisition

A Requisition is an official request to make a purchase. Requisitions are converted to Purchase Orders once they have completed the procurement approval cycle.

Req Approvals

Selecting this button will open the Review Approval window so that you can view the Approval Cycle. If your Requisition is within your approval authority, you can go straight to Place Order button. *Note: If your Requisition requires approval, the system will not let you bypass this section.*

Requisition Preparer

The Requisition Preparer is the person who processes the Requisition. In some cases the person actually requesting the goods or services.

Review

Selecting this button allows you to review and edit all sections of the Requisition before entering it into the Approval Cycle to create a Requisition by selecting Place Order. *Note: you must select the Review button before the Req Approval and Place Order buttons will activate.*

Save Updates

Selecting this button will save any items or changes that you have made since the last save.

SciQuest

SciQuest is the company that hosts the TechMart application.

Shopping Cart

An electronic “basket” used for holding items until the Requestor or Requisition Preparer instructs the system to “Place the Order”. At that point, a Requisition Number is assigned and it enters the procurement approval cycle.

SKU

Stock Keeping Unit. A common term for a unique numeric identifier, used most commonly in business to refer to a specific product in inventory or in a catalog.

SOS Buyer

A Caltech employee who has been granted delegated procurement authority under the Speedy Ordering System (SOS) Buying Program. See: Purchasing Services Policies and Procedures, which is posted on the Procurement Services website.

Supplier

A company or an individual that provides a product or service to the Institute in exchange for money. All non-Payroll payments are generated from the Oracle Payables system. To generate a payment from that system, the payee must exist in the Oracle Supplier Database.

Unit of Measure (UOM)

Designation such as EACH that specifies the unit or volume in which the product may be purchased.