Important Information to get Started:

Logging into TechMart: Log in to www.access.caltech.edu and click on “TechMart Purchasing” under the “Administrative Services”

TechMart Website:
http://procurement.sites.caltech.edu/departments/techmart

TechMart Help Email Address: TechMartHelp@Caltech.edu

TechMart Access Form (if you are requesting access to TechMart):
http://procurement.sites.caltech.edu/documents/976/ACCESS_REQUEST_FOR_TECHMART_E-PROCUREMENT_APPLICATION.pdf
## Department Buyers

<table>
<thead>
<tr>
<th>Division/Department</th>
<th>Primary</th>
<th>Backup</th>
<th>Phone Ext.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Team Lead</strong></td>
<td>Genelle Vinci</td>
<td>John Broeckel</td>
<td>Armando x2631</td>
</tr>
<tr>
<td>Athenaeum</td>
<td>Rudy Zepeda</td>
<td>John Broeckel</td>
<td>Briana x4997</td>
</tr>
<tr>
<td>Athletics</td>
<td>John Broeckel</td>
<td>Armando Munoz</td>
<td>Genelle x6276</td>
</tr>
<tr>
<td>Biology/ BBE</td>
<td>Phyllis Burton</td>
<td>Briana Nakawatase</td>
<td>John x4679</td>
</tr>
<tr>
<td>CACR</td>
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<td>Rudy Zepeda</td>
<td>Phyllis x6279</td>
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<tr>
<td>Campus Life</td>
<td>John Broeckel</td>
<td>Briana Nakawatase</td>
<td>Rachel x8429</td>
</tr>
<tr>
<td>Chemistry/CE</td>
<td>Phyllis Burton</td>
<td>Rudy Zepeda</td>
<td>Rudy x2578</td>
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<tr>
<td>Development</td>
<td>Rudy Zepeda</td>
<td>Rachel Fisher</td>
<td></td>
</tr>
<tr>
<td>Dining</td>
<td>John Broeckel</td>
<td>Rachel Fisher</td>
<td></td>
</tr>
<tr>
<td>EAS</td>
<td>Rudy Zepeda</td>
<td>Rachel Fisher</td>
<td></td>
</tr>
<tr>
<td>Facilities</td>
<td>Armando Munoz</td>
<td>Briana Nakawatase</td>
<td></td>
</tr>
<tr>
<td>Finance, HR, Research Admin</td>
<td>Rachel Fisher</td>
<td>Phyllis Burton</td>
<td></td>
</tr>
<tr>
<td>GPS</td>
<td>Rachel Fisher</td>
<td>Armando Munoz</td>
<td></td>
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<tr>
<td>Graphic Resources</td>
<td>John Broeckel</td>
<td>Briana Nakawatase</td>
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<tr>
<td>HSS</td>
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<td>Armando Munoz</td>
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<td>IMSS</td>
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<td>Rudy Zepeda</td>
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<tr>
<td>PMA</td>
<td>Briana Nakawatase</td>
<td>Armando Munoz</td>
<td></td>
</tr>
<tr>
<td>Provost, President’s Office, OGC, Library,</td>
<td>Rachel Fisher</td>
<td>Armando Munoz</td>
<td></td>
</tr>
<tr>
<td>CAPSI, JPL</td>
<td>John Broeckel</td>
<td>Briana Nakawatase</td>
<td></td>
</tr>
<tr>
<td>Safety/ Security</td>
<td>John Broeckel</td>
<td>Briana Nakawatase</td>
<td></td>
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<tr>
<td>SIRTF/ IPAC</td>
<td>John Broeckel</td>
<td>Rudy Zepeda</td>
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</tr>
<tr>
<td>Student Affairs (Health, Counseling, etc.)</td>
<td>Rachel Fisher</td>
<td>Phyllis Burton</td>
<td></td>
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<tr>
<td><strong>Commodity:</strong></td>
<td></td>
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<td></td>
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<tr>
<td>Computer</td>
<td>John Broeckel</td>
<td>Armando Munoz</td>
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</tr>
<tr>
<td>Consulting</td>
<td>Briana Nakawatase</td>
<td>Armando Munoz</td>
<td></td>
</tr>
</tbody>
</table>
Welcome to TechMart! Now, let’s make this personal…

In TechMart, you can edit and customize your profile to meet your specific needs. In your profile, you can create Default PTA’s, view your Purchasing Limit, check Financial Approvers, customize Email Notifications, etc.
Profile Settings: Notification Preferences

1. Go to **Notification Preferences** and select the section you want to edit (i.e. Shopping Carts & Requisitions)
2. Click **Edit Section**
3. Change preferences to your specific needs
4. Save Changes
Profile Settings: Notification Preferences

Common Notifications for **Shoppers/Requisitioners:**
- Requisition Workflow complete/PO created
- PO Workflow complete
- PO Sent to Supplier

Common Notifications for **Approvers:**
- Requisition pending Workflow approval
- PO pending Workflow approval
Profile Settings: Default PTA’s

1. Go to Default User Settings then Custom Field and Accounting Code Defaults
2. Select the Codes tab
3. Edit PTA Default Values
Profile Settings: Adding PTA’s

Your default PTA will be the value you see when creating your cart. However, you can create many values for a Project, Task, and Award. They will all appear in a drop down list of values once they are added to your profile.
Profile Settings: Adding PTA’s

You can add **Code Favorites** if you know you will always have a split within the PTA’s (i.e. 50/50 split or 60/40 split). Therefore, you don’t have to manually enter the split amount each time you create a cart/requisition.
Profile Settings: Viewing Financial Approvers

To view your Financial Approvers:
1. Go to Default User Settings
2. Select Financial Approvers
Profile Settings: Viewing Purchasing & Approval Limit Values

To view your Purchasing & Approval limits:
1. Go to **Ordering and Approval Settings**
2. Select **User Purchasing and Approval Limit Values**

<table>
<thead>
<tr>
<th>User Name</th>
<th>gen Vinci</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Profile and Preferences</td>
<td><img src="image1.png" alt="Image" /></td>
</tr>
<tr>
<td>Default User Settings</td>
<td><img src="image2.png" alt="Image" /></td>
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<tr>
<td>User Roles and Access</td>
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</tr>
<tr>
<td>Ordering and Approval Settings</td>
<td><img src="image4.png" alt="Image" /></td>
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**User Purchasing and Approval Limit Values**

<table>
<thead>
<tr>
<th>Limit</th>
<th>Value</th>
<th>Unit</th>
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<tbody>
<tr>
<td>Requisition Limit</td>
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<td>USD</td>
</tr>
<tr>
<td>Requisition Line Item Limit</td>
<td>50,000.00</td>
<td>USD</td>
</tr>
<tr>
<td>Requisition Approval Limit</td>
<td>50,000.00</td>
<td>USD</td>
</tr>
<tr>
<td>Requisition Line Item Approval Limit</td>
<td>50,000.00</td>
<td>USD</td>
</tr>
<tr>
<td>Purchase Order Limit</td>
<td>0.00</td>
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</tr>
<tr>
<td>Purchase Order Line Item Limit</td>
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<td>Purchase Order Approval Limit</td>
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<tr>
<td>Purchase Order Line Item Approval Limit</td>
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<td>USD</td>
</tr>
<tr>
<td>Limited Purchase Order Limit</td>
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<td>USD</td>
</tr>
<tr>
<td>Line Item Limited Purchase Order Limit</td>
<td>0.00</td>
<td>USD</td>
</tr>
</tbody>
</table>
Catalog Suppliers

**Punchout Supplier:** Suppliers that have provided a special link to their online catalog. This Punchout link is unique to Caltech, accesses the Supplier’s site that contains Caltech pricing, and then uploads the selected items from the Punchout Supplier into your TechMart Shopping Cart. To order from a Punchout Supplier, simply click on their logo and you will be directed to their catalog.

**Hosted Catalog Supplier:** 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. To order from a Hosted Catalog Supplier, click on their logo and search for the product you are looking for.
Catalog Suppliers Cont’d

**Note:** Punchout Suppliers will have a pop out symbol 📞 in the upper right-hand corner.

*Instructions on how to order through the Airgas Punchout:*
[http://procurement.sites.caltech.edu/documents/880/airgas_ordercompressedgases_oovvb0x.pdf](http://procurement.sites.caltech.edu/documents/880/airgas_ordercompressedgases_oovvb0x.pdf)
Other Ways to Order from Catalog Suppliers

Quick Order
1. Click on **Quick Order**
2. Enter the Supplier’s part number and select **Add to Active Cart**

Search the Supplier’s Catalog
1. Click on **Suppliers**
2. Select **Click to expand Search for Supplier Filter**
3. Select **Supplier Type** from the dropdown menu and **Search**
If you are searching for a product but do not have a specific vendor in mind, you can use the **Shop** widget located on the TechMart Homepage. A list of items from our TechMart preferred vendors will appear that have “500 mL beaker” in the line item description. From here, you can select an item and **Add to Cart** or select **Order from Supplier**, which will take you directly to that product in that supplier’s Punchout catalog.
Non-Catalog Suppliers

**Non-Catalog Supplier:** 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.
Catalog vs. Non-Catalog Orders

- Non-Catalog Order
- Financial Approver(s)
- SOS or PPS Buyer
- Supplier
- TechMart Catalog Order
- Financial Approver(s)
- Punchout
- Hosted Catalog
- TechMart Shopping Cart
TechMart Forms

- **Change Request:** Used to modify an existing Purchase Order (i.e. increase funds, change PTA, cancel PO, extend/renew existing agreement)
- **Compressed Gas – Airgas*: Used for new Airgas specialty gas orders that cannot be ordered through the Airgas Punchout Catalog
- **Consulting Services:** Used to set up new Consulting Service Agreements to a consultant/independent contractor
- **Research Subcontracts:** Used for Research Subcontracts including JPL Work Orders and new Blanket Purchase Orders
- **Service Agreements:** Used to set up new Service Agreements other than Consulting Services
- **Spot Buy:** Used to purchase goods and materials

*Instructions on how to order using the Airgas Form:*

*Must use the **Ship To** address called “Cylinders”*
TechMart Forms Cont’d: Custodian Access

- **Partial Sales & Use Tax Exemption**: Used for orders that qualify for a partial tax exemption under California Regulation 1525.4.

  Only “Custodians” who have completed the Partial Sales & Use Tax Exemption Training will have access to this form. To sign up for Custodian training, please email TechMartHelp@caltech.edu.

*Additional information about the Partial Sales & Use Tax Exemption:*
http://procurement.sites.caltech.edu/documents/877/ca_partial_sales_use_tax_exemption.pdf
• **Invoice Attached:** Used for invoices that require payment and whose line items are not listed on the Payment Request Usage List*

“Invoice Attached” indicates that goods and/or services have already been rendered in the absence of a Purchase Order, and the Supplier is solely seeking payment. These are to be used on a case by case basis, for special circumstances only. It is encouraged to obtain a quote and establish a Purchase Order (Contract) prior to the Supplier providing the goods and/or services. An “Invoice Attached” does not incorporate Caltech Terms and Conditions, nor does it include insurance requirements, creating risk and liability to the Institute. Therefore, it is imperative that all transactions follow Caltech Purchasing Policies and Procedures and “Invoice Attached” transactions are avoided as much as possible.

• **Reimbursement:** Used to reimburse a Caltech student/employee for items/services not listed on the Payment Request Usage List*

*Link to Payment Request Usage List:*
http://forms.caltech.edu/Procurement/paymentrequestusages.pdf
Life Cycle of a TechMart Order

Shopping Cart (Draft Requisition): The first step to ordering in TechMart involves adding items to your shopping cart (either from a Punchout/Hosted Catalog or a Form).

- Shopping carts represent items selected for purchase from shoppers. They contain line items that represent goods/services being requested.
- Shopper, Requisitioner, or Approver can create a Shopping Cart

Requisition: A Shopping Cart will turn into a Requisition once the “Place Order” button has been selected. This will generate a Requisition Number.

- If a shopping cart exceeds your purchasing limit and requires approval from your Financial Approver, they will receive a Requisition in their TechMart queue to approve.
- Requisitioner or Approver can create a Requisition
Life Cycle of a TechMart Order Cont’d

**Purchase Order:** A Purchase Order (PO) number will only be generated once the Requisition has been sent to the Supplier.

- *TechMart cannot issue a PO number before it is sent to the Supplier.*
- *TechMart will assign a unique PO number once the Requisition has been approved by the Financial Approver(s) and Buyer.*

• This is what a complete PO number from TechMart will look like:

![PO Number Example](image)

- The preceding value represents the Department Code used for this order.
- The subsequent value represents the unique PO number automated by the system.

• When referencing a PO number to the Supplier, please use the entire number i.e. “6A-S297518”, as that is what they will have in their system.
Ordering from a Non-Catalog Supplier

To place an order from a Non-Catalog Supplier:
1. Select the appropriate Form type under the Organizational Forms widget on the TechMart Homepage.
Ordering from a Non-Catalog Supplier Cont’d

2. Enter Supplier Name
   *If you see “Try Searching Again” when you type the supplier name, this means the supplier is not in the TechMart database and will need to be added. Enter and select “New Supplier” (see step 10).*

3. Enter the Item No. if available. If not, enter “N/A”.

4. Enter Product Description

5. Enter Quantity needed for that item

6. Enter UOM (change as necessary)

7. Enter Unit Estimated Price
   *Please use pre-tax price, as TechMart will automatically generate the tax. Use total (including tax) for Reimbursements only.*
8. Enter New Supplier Info. for suppliers not found in the system: i.e. Supplier Name, Supplier Address, Supplier Phone and Fax, Supplier Email, Contact Person (if available).

9. Enter any notes/instructions for your Buyer in the **Note to Buyer** field.

10. You can **Add Attachments** for your Buyer under Internal Attachments i.e. Quote(s), Invoice(s), Receipt(s), Noncompetitive Justification, etc.

11. Enter any notes/instructions for the Supplier in the **Supplier Instructions** field.

12. You can **Add Attachments** for the Supplier under External Attachments.
Ordering from a Non-Catalog Supplier Cont’d

13. If you are only adding one item to your shopping cart, select **Add and go to Cart** from the **Available Actions** dropdown then select **Go**. This will redirect you to your shopping cart.

![](image1.png)

14. If you are adding more than one item to your cart, select **Add to Cart and Return** then select **Go**. This will bring you back to the form where you can continue adding line items as needed.

![](image2.png)

**Note:** You cannot mix form types in a single shopping cart (i.e. Spot Buy and Invoice Attached). You must create a new cart for each form type.
Managing Your Shopping Cart

Once you have added the item(s) you wish to purchase, you will be taken to your **Active Shopping Cart**. Here, you have the option to:

1. Name your Cart  
   *Recommended as this will make it easier to locate your purchase in the future*
2. Add (selected items) to Favorites
3. Remove (selected items) from your shopping cart
4. Move (selected items) to Another Cart
5. Change Supplier
6. Add (selected items) to Pending Cart/Req/PO

Select the line item(s) you wish to perform an action on.
Managing Your Shopping Cart Cont’d

From here, you can Continue Shopping if you wish to add additional items to your shopping cart or you can Proceed to Checkout if your cart is complete. Your Shopping Cart will be saved in TechMart until you Proceed to Checkout or the cart is deleted.
View Your Shopping Cart

To view your Shopping Cart(s):
1. Click on the Shop symbol from your TechMart menu bar
2. Select View Draft Shopping Carts

From here, you can (3) change your Active Cart, (4) open your Shopping Cart, or (5) delete your Shopping Cart.
Draft Requisition

Select **Go to Advanced Checkout** which will take you to your draft requisition summary. This will prompt you to review each field of your draft requisition prior to placing the order.

**Note:** At this point, a draft requisition number will be generated.
Draft Requisition: General

The **General** section is where you can **edit**:

1. Cart Name
2. Priority
   *For RUSH orders, change priority to “Urgent”*
3. Description (optional)
4. Approver
   *If your default approver is out for an extended period of time and will be unavailable to approve your requisition, you can select an alternate approver from your profile values.*
5. Click **Save**
Draft Requisition: Shipping

The **Shipping** section is where you can edit:

1. Ship to address
2. Delivery Options
   - For RUSH orders, select “Expedite” and provide a need-by date in the “Delivery Date” field
3. Click **Save**

### Edit current shipping address...

Fields in **bold** are required for checkout.

- **Attention:** Briana Nakawatase MC 103-6
- **Address Line 1:** 391 S Holliston Ave
- **City:** Pasadena
- **State:** CA
- **Zip Code:** 91125
- **Country:** United States

- [ ] Save this address for future use

[Save Changes]  [Cancel]

### Or choose from your addresses...

**CALTECH**

- Briana Nakawatase
- 391 S Holliston Ave
- Pasadena, CA 91125
- United States

[Use]  [Edit]  [Delete]

Your current default address

### Or select a new address...

You can search by address nickname or use the address text field to search for any part of the address (e.g. street, building name, city).

- **Nickname / Address Text:** CLYINDERS
- **Results Per Page:** 10

[Search]

### Delivery Options

- **Expedited:** 
- **Ship Via:** Best Carrier-Best Way
- **Delivery Date:** no value

[edit]
Draft Requisition: Billing & Supplier Info

The **Billing** section indicates on the PO to the supplier where to send their invoice. This section will never need to be modified.

The **Supplier Info** section should have your Default Dept. Code. If not, manually enter your Dept. Code for this order.
Draft Requisition: Internal Info

The **Internal Info** section is where you can:

1. **Add Internal Attachments**
   - **Edit and:**

2. **Add an Internal Note**
   - **Note:** Internal Note & Attachments will only be viewed by Caltech personnel

3. **Change Tax Information***

4. **Certify Equipment Screening**
   - Only required if all three of the following criteria are met:
     1. $10K or more
     2. Classified as “Equipment”
     3. Federally funded
   - Once you have completed the screening (if required), select “Yes”.

5. **Click Save**

*You will need to **View/edit by line item** if tax status varies per line (i.e. line 1 is “supplies” and line 2 is “fees”)*
Draft Requisition: POETA Codes

The **POETA Codes** section allows you to **edit** the PTA and Expenditure Type at the header level or **View/edit by line item** (line level).

If you wish to split the POETA (i.e. 50/50, 60/40), select **add split** and fill in the desired POETA information.

**Note:** You cannot split a line item using awards with different equipment title information (i.e. Title to Caltech and Title to Government).
Draft Requisition: Adding Line(s)

To add a line to your requisition:

1. Click into the line
   *This will reopen the form*

2. Add product details for the additional item you want to purchase
   *i.e. Item No., Product Description, Qty., etc.*

3. Select **Add to Pending Cart/Req/PO** from the **Available Actions** dropdown
   *Important: DO NOT select **Save** as this will change the existing line.*

4. Click **Go**
   *This will open a new window*

5. Select the Cart or Requisition you wish to add the line to and click **Add to Pending Cart/Req/PO**
Draft Requisition: Adding Line(s) Cont’d

• Now that you have successfully added a line, you will see it as a new line item on your draft requisition.

• If you added a line to the incorrect requisition or need to delete a line: (1) check the box for that line item, (2) select the appropriate action from the line item dropdown (i.e. Remove Selected Items, Move to Another Cart, etc.), and (3) click Go.
Draft Requisition: Place Order

Once you have reviewed your draft requisition, you should see green check marks showing that each section has been completed. If you are missing a green check mark, you will need to go into that section and complete the required information. Once everything is complete, click **Place Order**.

All done! The required information has been completed and this request is ready to be submitted.

Once you have reviewed the details, you may continue by clicking the button at the top of the page.
View Your Orders

To view your TechMart orders:

1. Click on the **Shop 🛒** symbol from your TechMart menu bar
2. Select **View My Orders**

You can also locate your active or draft shopping cart(s) from this menu.
Requisition Status

• You can check status of your Requisition in the **Req Approvals** tab. The *Active* symbol represents where your Requisition is currently sitting.

• You can also view the **History** tab for additional details.
What is my Purchase Order Number?

You can quickly locate your PO number from your Requisition. Once you are in the Requisition, scroll down to the bottom of the page to the **Supplier / Line Item Details** section. Here, you will find your PO Number.

**Note:** You will not see a PO Number if your Requisition is still sitting with an Approver or Buyer.
If you want to search for a document:

1. Go to the **Document Search** widget on the TechMart Homepage.
2. From here, you can perform a simple search or your can go to **Advanced Search** for more detailed options.

*The “advanced search” allows you to search by Requisition Number, Supplier Name, Award, etc.*
Adding Favorites

If you want to add a frequently purchased item to your Favorites:

1. Select the appropriate Form type under the Organizational Forms widget on the TechMart Homepage.

2. Complete the form and select Add to Favorites from the Available Actions dropdown menu.

3. Click Go
   This will open a new window
3. If you do not already have an existing Favorites destination folder, click Add New then Top level personal folder to create a folder.

4. You will need to name your personal folder and Save Changes.

5. Once your folder has been added, select your desired destination folder and Save Changes.
Managing Favorites

To access your saved Favorites:

1. Click on the Favorites shortcut under the Shop widget from the TechMart Homepage.

2. Check the box of the item(s) you wish to perform an action on, and open the Actions for Selected Favorites dropdown. From here, you can Add to Cart, Edit, Move, Copy, or Delete.

3. Select View Form to make any changes to the item (i.e. update price, quantity, etc.) then select Save and Go from the available actions within the form.