

Caltech

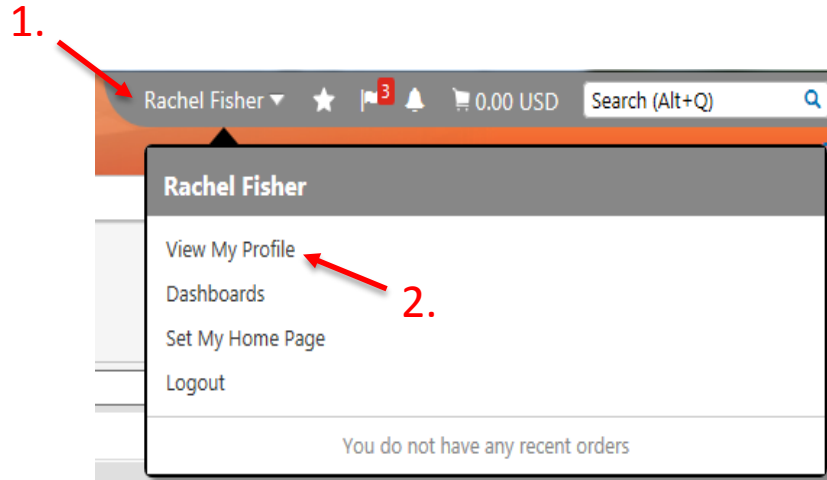


APPROVER TRAINING

Set Up Your Profile to Receive Emails

To set up email notifications for Requisitions pending your approval:

1. Login to TechMart, then click on your name to view the dropdown menu
2. Select **View My Profile**



Set Up Your Profile to Receive Emails Cont'd

3. Go to **Notification Preferences** then **Shopping Carts & Requisitions**
4. Click **Edit Section**
5. Change **Requisition pending Workflow approval** to “Email”
6. Save Changes

Rachel Fisher
User Name rfisher

Notification Preferences: Shopping, Carts & Requisitions [Edit Section ?](#)

Cart Shared Notice ?	None
Requisition submitted into Workflow ?	Email
Favorites Has Exported Notice ?	None
Favorites Has Imported Notice ?	None
Requisition pending Workflow approval ?	Email
Requisition Workflow Notification available ?	None
Requisition Workflow complete / PO created ?	None
Requisition line item(s) rejected ?	None
Requisition rejected ?	None

3. [Shopping, Carts & Requisitions](#)

4. [Edit Section ?](#)

5. Requisition pending Workflow approval ?

Approvals Initiated Through Email

If you receive a Requisition pending approval, you will receive a notification email from TechMart@caltech.edu. The email will contain:

- Summary Information of the Requisition
- Details including: supplier name, form type, number of line items, value of each line item, and a description of the product(s) being purchased
- POETA Codes
- Shipping Address
- A link to instantly direct you to the TechMart application

Approvals Initiated Through Email Cont'd

Click on the **View Purchase Order Approvals** link at the bottom of your notification email. This will direct you to your **Req Approvals** folder in TechMart.

If you are not already logged into TechMart, you will first be prompted to the login screen.

New Pending Approval for Purchase Order#: S298934	
Team Lead Approval Request for Purchase Order# S298934	
Dear Genelle Vinci,	
The purchase order listed below has been submitted for your approval.	
Summary	
Folder:	Team Lead
Owner Name:	Lorianne Bowers
Purchase Order #:	S298934
No. of line items:	1
TOTAL:	160,000.00 USD
Details	
EIS TECHNOLOGIES INC [PO-DULUTH]	
Invoice Attached	
Form Type:	Invoice Attached
Item 1	
Description:	Please pay attached invoice.
Catalog Number:	Inv No 7045
Quantity:	1
Unit Price:	160,000.00 USD
Ext. Price:	160,000.00 USD
Size/Packaging:	EA
Equipment Screening	No
Certification:	
Form Attachments	
Internal Attachments:	EIS Invoice with Approval.pdf
FORM TOTAL:	160,000.00 USD
TOTAL:	160,000.00 USD
POETA Codes	
Project:	FIN.00015 : PAYROLL ADMIN
Task:	1 : 1
Award:	GB.000007 : AVPICONTROLLER
Expenditure:	Fees : Fees
Organization:	Caltech : Caltech
Additional Information	
Summary Details	
Tax Information:	Non-Taxable - Other - Non Taxable Other
Dept Code:	8K
Purch Agent:	Fisher, Rachel
Position:	PPS Buyer 1 - \$25,000 Limit
Phone:	(626) 395-8429
Fax:	(626) 421-7998
Email:	rfisher@caltech.edu
Requestor:	Bowers, Lorianne - Bowers, Lorianne
Delivery Date:	9/20/2016
Comments:	(0)
Other Possible Approvers	
Suzy Dollar	
Monica Marquez	
Kevin Speaks	
Ruth Brambila	
Elizabeth De Clue	
Cynthia Rowand	
Internal Attachments	
2_NC 78974607.pdf	
6_DC 78974607.pdf	
3_MR 78974607.pdf	
1_PJ 78974607 signed.pdf	
Shipping Address	
Attention: Lorianne Bowers	
271 S. Chester Ave.	
Pasadena, CA 91106	
United States	
View Purchase Order Approvals	

Approvals Initiated Through TechMart

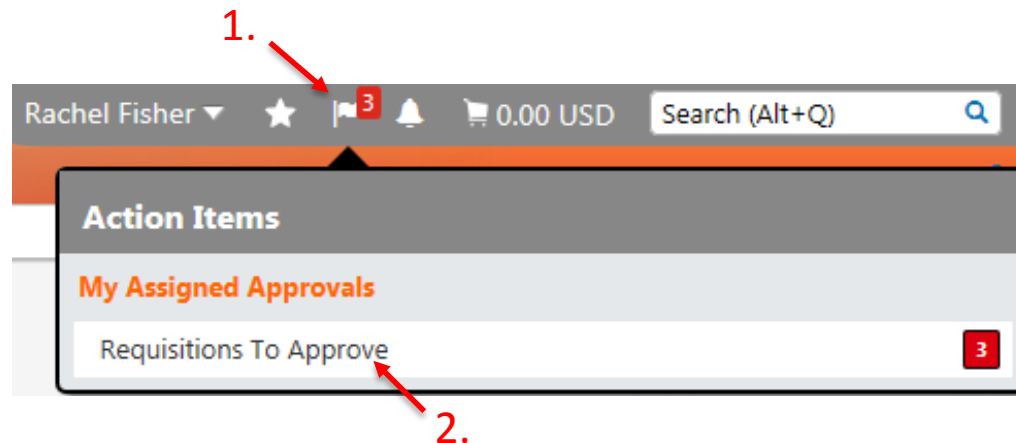
If you receive a Requisition pending approval and you are already logged in to TechMart:

1. Click on the **Action Items**  symbol from your TechMart menu bar

Note: *the number inside the red box indicates the number of requisitions pending your approval.*

2. Click **Requisitions To Approve**

This will direct you to your Req Approvals folder



Requisition Approvals Folder

Requisitions requiring your approval will be listed under the **My Req Approvals** folder.

- To view a Requisition, click on the Requisition Number.

Sort by: ?

Hide requisition details expand all collapse all Results per folder: 20

My Req Approvals [1 result]

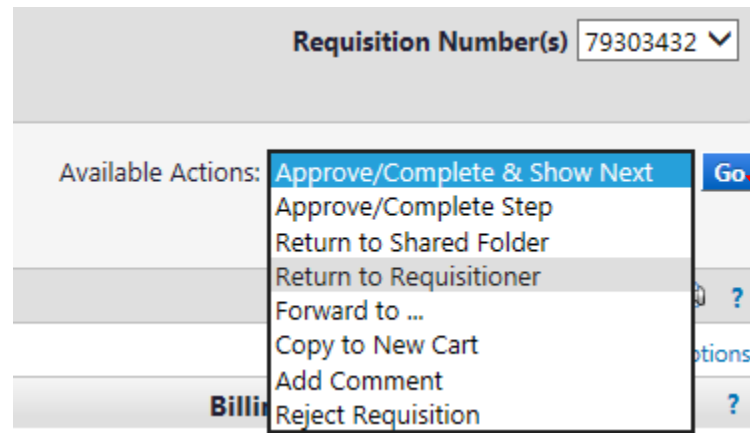
Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
 1262770	BIOEXPRESS CORPORATION dba ISC BIOEXPRESS INTERMOUNTAIN SCIENTIFIC CORPORATION [PO-KAYSVILLE]	James Cowell	12/15/2014 2:50 PM	Pamela Croomes	10,989.00 USD	Approve

Requisition Name: FPR9996584
No. of line items: 2

Folders: 0 Days in folder [My Req Approvals]

Reviewing Requisitions

- Verify all information entered on the Requisition is correct (i.e. PTA, Expenditure Type, Price, etc.) and all appropriate attachments are included (i.e. Quote, Noncompetitive Justification Form, etc.)
- Once everything has been reviewed, select the appropriate action from the **Available Actions** dropdown and click **Go**



The screenshot shows a web interface for reviewing a requisition. At the top, there is a field labeled "Requisition Number(s)" with the value "79303432" and a dropdown arrow. Below this, there is a section titled "Available Actions:" followed by a dropdown menu. The menu is open, showing several options: "Approve/Complete & Show Next" (highlighted in blue), "Approve/Complete Step", "Return to Shared Folder", "Return to Requisitioner", "Forward to ...", "Copy to New Cart", "Add Comment", and "Reject Requisition". To the right of the dropdown menu is a blue button labeled "Go", which is pointed to by a red arrow. Below the "Available Actions:" section, there is a partially visible "Billi" button and a "Options" button with a question mark icon.

Note: *If additional approval is required, the Requisition will automatically be forwarded to the next Approver once you approve.*

Returning a Requisition to the Requisitioner

If the Requisition is incomplete and/or requires edits, you can select **Return to Requisitioner** from the Available Actions dropdown within the requisition (see previous). A dialog box will appear for you to add a comment to the Requisitioner to explain why you are returning the requisition.

Return to Requisitioner ? X

Return the requisition to the requisitioner as a draft cart so they can correct errors and resubmit for approval.

Reason for return

Noncompetitive Justification is incomplete. Please complete Section II and reattach.

1000 characters remaining [expand](#) | [clear](#)


Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

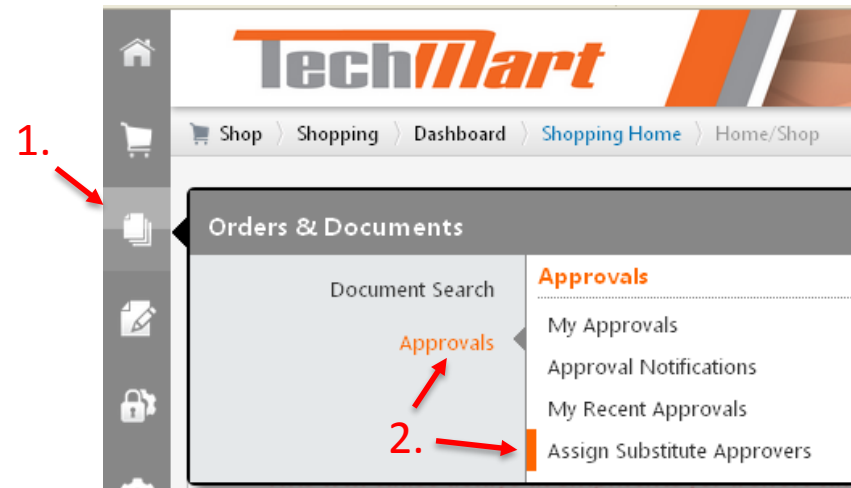
[Return to Requisitioner](#) [Cancel](#)

Note: You can also add a comment to the Requisition when you **Forward, Reject, or Return to Shared Folder.**

Assigning a Substitute Approver

If you know that you will be out for a scheduled vacation, leave of absence, or business trip, you can assign another Approver to your TechMart Approval Folder to act on your behalf.

1. Click on the **Documents**  symbol from the TechMart menu bar
2. Select **Approvals** then **Assign Substitute Approvers**
3. Click the **Assign** button for the folder you wish to assign to a substitute Approver



Assign Substitute to All Requisition Folders End Substitute for All Requisition Folders

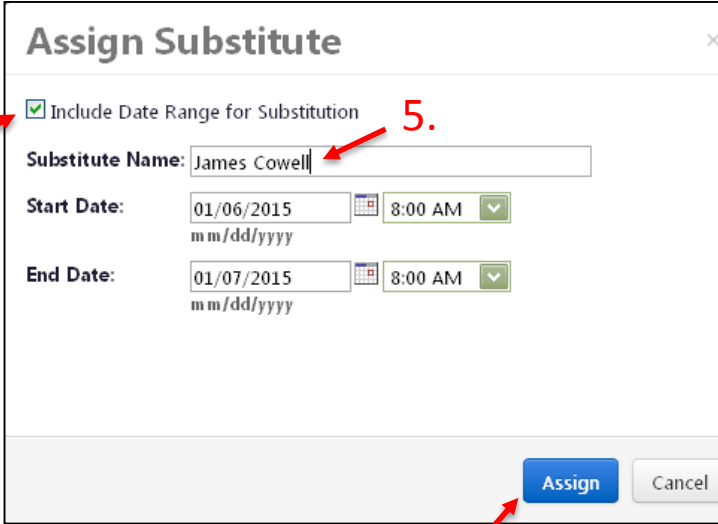
Showing 1 - 3 of 3 Results All Folder Results Substitution Actions ▾

Results Per Page 20 ▾ Sort by: Folder name ascending ▾ Page 1 of 1 ?

Folder Name	Approver	Substitute	Action	<input type="checkbox"/>
My Req Approvals	Rachel Fisher		Assign	<input type="checkbox"/>
PPS Buyer Fisher	Rachel Fisher		Assign	<input type="checkbox"/>
Purch Agent: Fisher, Rachel: (All Values)	Rachel Fisher		Assign	<input type="checkbox"/>

Assigning a Substitute Approver Cont'd

4. If you wish to specify a start and end date, check the box for **Include Date Range for Substitution**
5. Enter a **Substitute Name**
Note: the Substitute must be an existing Approver
6. Once the Substitute Approver's name is populated, click **Assign**



The screenshot shows a dialog box titled "Assign Substitute" with a close button (X) in the top right corner. The dialog contains the following elements:

- A checked checkbox labeled "Include Date Range for Substitution" with a red arrow and the number "4." pointing to it.
- A text input field labeled "Substitute Name:" containing the text "James Cowell" with a red arrow and the number "5." pointing to it.
- A "Start Date:" section with a date input field showing "01/06/2015" (format: m m/dd/yyyy) and a time dropdown menu set to "8:00 AM".
- An "End Date:" section with a date input field showing "01/07/2015" (format: m m/dd/yyyy) and a time dropdown menu set to "8:00 AM".
- At the bottom right, there are two buttons: a blue "Assign" button and a grey "Cancel" button. A red arrow and the number "6." point to the "Assign" button.

Removing a Substitute Approver

Follow Steps 1 and 2 from **Assigning a Substitute Approver** (see previous) to return to the Substitutions page.

- Click the **Remove** button of the folder you wish to end substitutions for, or click the **End Substitute for All Requisition Folders** button to remove all substitutions

Showing 1 - 5 of 5 Results

All Folder Results

Assign Substitute to Selected Folders Go

Results Per Page: 20

Sort by: Folder name ascending

Page 1 of 1

Folder Name	Approver	Substitute	Action	<input type="checkbox"/>
Missing Position/Supplier	Genelle Vinci	James Cowell Start Date: 01/06/2015 8:00 AM End Date: 01/07/2015 8:00 AM	Remove	<input type="checkbox"/>
My Req Approvals	Genelle Vinci		Assign	<input type="checkbox"/>
PPS Buyer Meyer	Genelle Vinci		Assign	<input type="checkbox"/>
PPS Buyer Meyer	Genelle Vinci		Assign	<input type="checkbox"/>
Purch Agent: Vinci, Genelle: (All Values)	Genelle Vinci		Assign	<input type="checkbox"/>

caltech.edu