

# Caltech

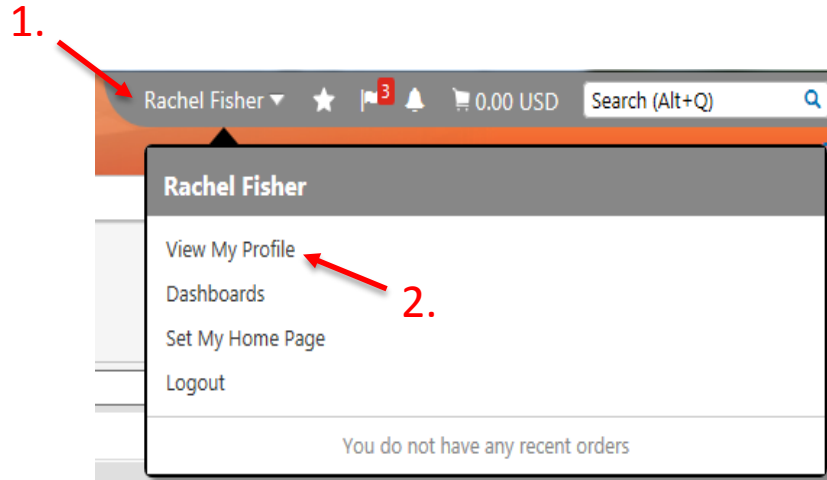


# APPROVER TRAINING

# 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

The screenshot shows a user profile for Rachel Fisher. The left sidebar contains a menu with 'Shopping, Carts & Requisitions' selected. The main content area is titled 'Notification Preferences: Shopping, Carts & Requisitions' and contains a table of notification settings. A red arrow labeled '3.' points to the 'Shopping, Carts & Requisitions' menu item. Another red arrow labeled '4.' points to the 'Edit Section' link in the top right corner. A third red arrow labeled '5.' points to the 'Email' value for the 'Requisition pending Workflow approval' row, which is circled in red.

Notification	Current Setting
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

# 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

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**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:	<a href="mailto:rfisher@caltech.edu">rfisher@caltech.edu</a>
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

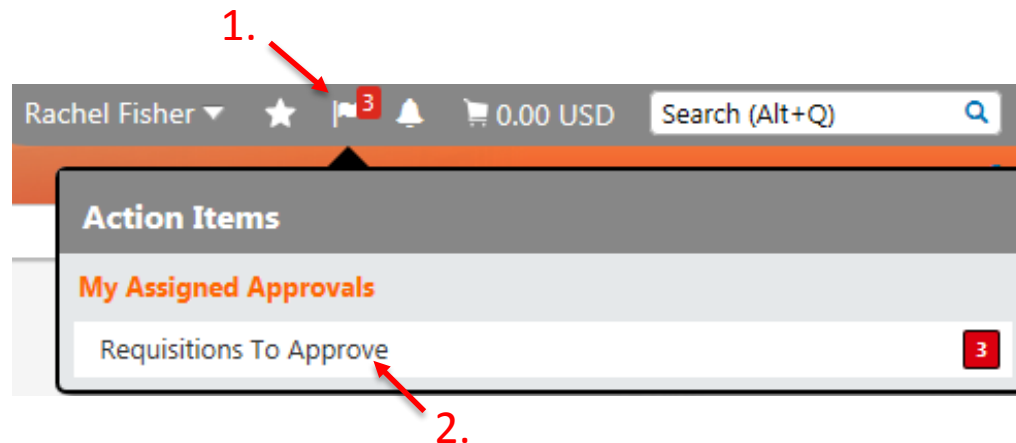
If you receive a Requisition pending approval and you are already logged in to TechMart:

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	<input type="checkbox"/> <a href="#">Approve</a> <input type="checkbox"/>

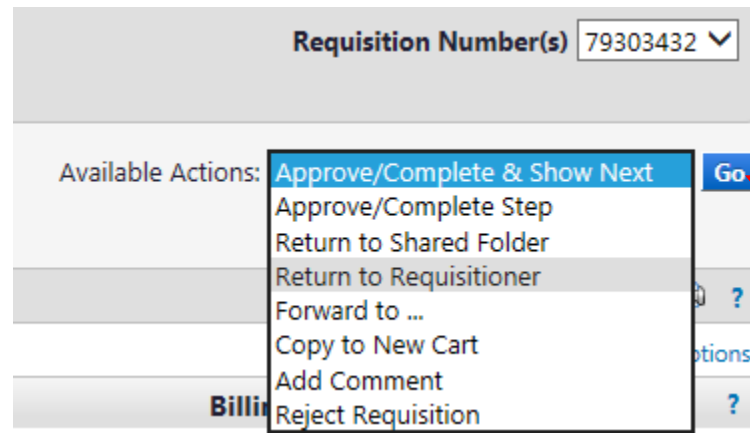
Requisition Name: FPR9996584  
No. of line items: 2

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 help 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.

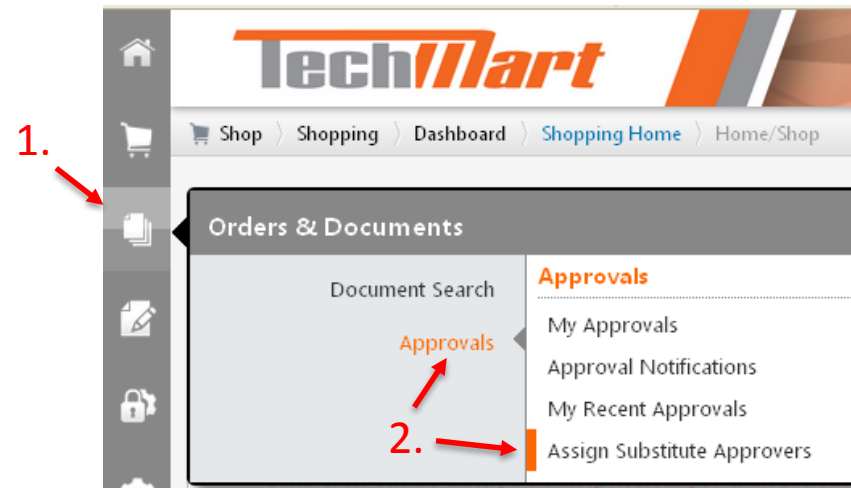
[Return to Requisitioner](#) [Cancel](#)

**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 ▾

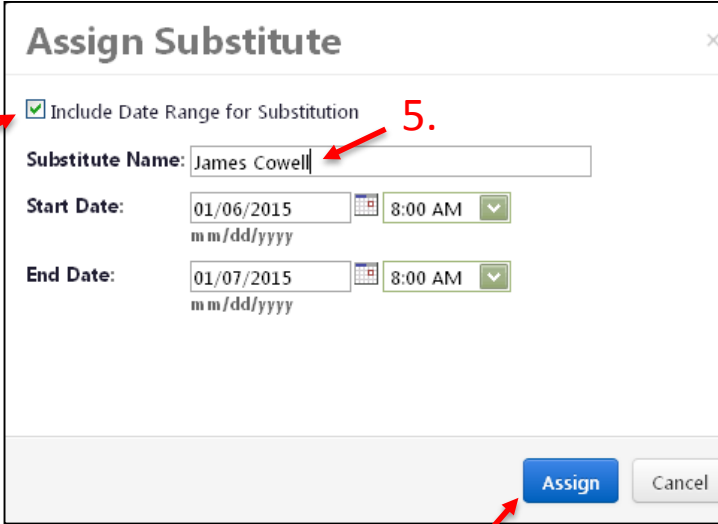
Results Per Page 20    Sort by: Folder name ascending    Page 1 of 1 ?

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

A red arrow labeled '3.' points to the 'Assign' button in the first row of the table.

# 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**



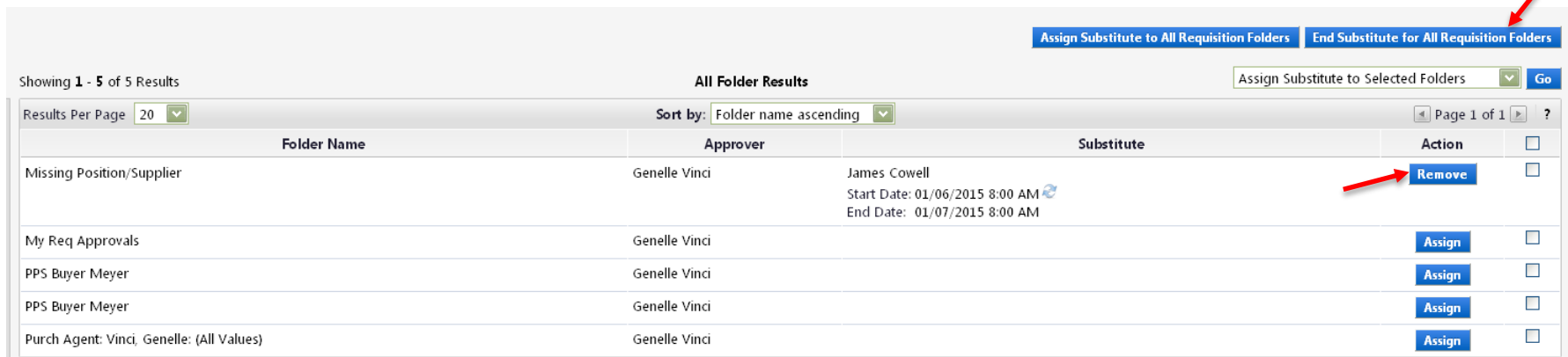
The screenshot shows a dialog box titled "Assign Substitute" with a close button (X) in the top right corner. The dialog contains the following elements:

- 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" (with a calendar icon), a time dropdown menu showing "8:00 AM", and the format "m m/dd/yyyy" below it.
- An "End Date:" section with a date input field showing "01/07/2015" (with a calendar icon), a time dropdown menu showing "8:00 AM", and the format "m m/dd/yyyy" below it.
- 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 All Requisition Folders End Substitute for All Requisition Folders

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"/>

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