

# Pitt – External Standing PO Manual

Creating a new PO as an Institutional, Organizational, or Core Admin

- Navigate to the core page
- Click on the PO Tab
- Click on New Purchase Order

Cytometry Facility														
					About Our Core	Schedule Equipment	Request Services	View All Requests	Reservations	People	Reporting	1 PO (0)	Charge Entry	Administratio
Active POs (1) Inact	tive POs (0) Pending approv	al POs (0)										•	2 🔸 Add Pur	rchase Order
▼ Keywords Go	Requester	Core	PO Number	Expires On		Shared With		Amount Available	Attachments		Status		Actio	m
► Requester	Pamela Aaltonen	Cytometry Facility	PO12348574	Dec 31, 2025		0		\$189,900.00			Active		=	
► <u>Lab</u>											Dec 10	), 2024		
Core Institution														
Requester Institution														
Shared with														
Apply Filters														
Reset Filters														

- Uncheck the search for current customers only box
- Search for a customer
- Click Proceed

Fill out the fields below to store All fields are required except fo	e your purchase order. The PO name can be used as a quick reference r PO name.
Purchase Order Details	Share with Other Group Members
Who are you creating this p	ourchase order for?
Start typing the name of	the individual
Search for Current cus	tomers only 3 Proceed



•	Fill in the PO	information	and	click 'Save'	or 'Save	and Approve'
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Add Purchase Order	×
Fill out the fields below to store your purchase order. The PO name can be used as a quick re All fields are required except for PO name.	aference.
Purchase Order Details Share with Other Group Members	
Who are you creating this purchase order for?	
ABATE, ADAM - adam@abatelab.org.ilabx.com - no phone - ABATE, ADAM (UCSF) La	ab (+1
Search for Current customers only Proc	eed
Core: Cytometry Facility	
• Number	
Name	
* Initial Amount	
* Expiration Date	
Attachments Upload PO	
Cancel Save and Approve	Save

## **PO's Pending Approval**

- Navigate to the core page
- Click on the PO Tab
- Click the Pending approval POs tab
- Click on PO number to review or edit the PO information
- Click the green check to approve

ytometry Facility														
					About Our Core Sch	edule Equipment	Request Services	View All Requests	Reservations	People R	leporting	Billing PO (	Charge Entry	Administration
Anthen DOn (4) Inner	the DOs (0)	Ponding approval DOr (1)											+ Add Pr	urchase Order
Hide Filters     Keywords	Requester	Core	PONumber	Expires On		Shared With	Ama	unt Available Atta	chments	Stat	tus		Action	
Requester     Lab	ADAM ABATE	Cytometry Facility	PO125874	Dec 31, 2034		0	5	1,000,000.00		Pen	ding Approv	zal	<b>√</b> ×	
Core Institution     Core Facility														
Requester Institution     Shared with														
Apply Filters     Reset Filters														



#### Using the PO in a request

- Initiate a request on behalf of the external user you selected for your PO
- Under the Payment Information section, Select Standing PO and then the PO from the second dropdown

Project Request Request Name: [CF-PA-[CD] Customer: Panela Autonen Li Email: astronen@purdue.edu.li Labels	ab:Astorient, Panela (PUR) Lab ablucion Plenet: no phone								
Forms and Request	t Details								(see bottom of list to add items to this request) ) (Ξ
<ul> <li>Dec 11 0108 PM</li> </ul>	Analysis Fee (Hourly Rate) Services		/	Quantity 1.0	Unit Price \$50.00	Tutal \$50.00	Not Ready Tr 🗸	Wark Status: Proposed	\$ Z \$
<ul> <li>Dec 11 otd8 PM</li> </ul>	Decontamination Fee Services		/	Quantity:	Unit Price \$50.00	Total \$50.00	Not Ready Tr V	Work Status Proposed	\$- III ×
View Form: Please give t	his form a name								Visible V Not Started V 🗠 😳 🗙
								Build a quote, or add component	ervice add charge add form add milestone sort manually s to a new or running request using the 'add' links above.
Cost									
Please provide the customer wi	th a final quote for this request. The quote will be based on th	e services and charges you have added above and any "buffer"	you have added. The "but	ffer" amount is for services or charge	es that you have not yet defin	ed but that you expect t	to arise during the course of the request.		
Add value or percent buffe     as percentage      amount:	r: 0%								
Quote (total predicted cost     S[100.00	t: (automatic total of any services, charges or buffer added to th	is request)							
Payment Informatio	n								
Please enter the Standing PO. You will have the opportunity to 76 1 100.0 % 2 P	review the quote before being billed. tanding PO O12348874 (Approved) Add new PO	Amount							
100.0%	Total Allocated 🥥	Split Charge							

#### Using the PO for Equipment Charges

- Initiate a reservation on behalf of the external user you selected for your PO
- Under the Payment Information section, Select Standing PO and then the PO from the second dropdown

al 1	Operation Contracts			
	Comments Contacts			
Reservation de	tails OUnsaved reservation - eliek s	ave reservation		
For: Instance 1	tstance 1 (logged time) - Pamela Aaltonen, (no phone) - (Aaltonen1, Pamela (PUR) Lab) - (Unconfirmed)			
Lab: <u>Aaltonen1</u> , Created on: De	. Pamela (PUR) Lab scember 11, 2024 15:13			
Event Notes:			note visible to anyone	
			Copy notes to the charge and display on the	11000
fimes				
Scheduled	Start Dec 11 2024 08:00 AM	End Dec 11 2024 10:00 AM		
Logged	Dec 11 2024 08:00 AM	Dec 11 2024 10:00 AM	1	
Billable	Dec 11 2024 08:00 AM	Dec 11 2024 10:00 AM	1	
Jse and cost of	f reservation			
Duration	Effective Rate	Amou	nt. Uos Type	
2.0 hours	\$60.00	- 8128.8	B Default usage type Base Male	
2.0 hours	Total Cost	8120.0	e External Asademia	
in Driving Carlolin				
Privily Count				
	and the second			
Additional char	rges for this event			
Additional char	iges for this event			Add additional service charge
Additional char	ges for this event			Add additional service charge
Additional char	nation			Add additional service charge
Additional char Payment inform Please select the	nation			<ul> <li>Add additional service charge</li> </ul>
Additional char Payment inform Please select th %	nation te payment method: @ Standing PD V		Amount	Add additional service charge
Additional char Payment inform Please select th % 1 100.0 %	nation he payment method: Bisnoting PO PO12248574 (Approved) *	Add new PO	Amount	Add additional service charge
Additional char Payment inform Please select the % 1 100.0 %	nation a pagment method:	v] <u>Add new PQ</u>	Amount	Add additional service charge
Additional char Payment inform Please select th % 1 100.0 %	nation a payment mathod Standing PD P012248074 (Approved) Total Allocated	♥] Add new PO	Anount	Add additional service charge



### Creating a new PO in the request/reservation workflow

- In a request and reservation, there is an option to create a new PO
- Click on the "Add New PO" link under the payment information header and then follow the steps for creating a new PO
- The PO will then appear in the PO tab for approval

#### Payment information

Please select the p	ayment method: 🔞	
%	0	Amount
1 100.0 %	Standing PO     Image: Standing PO       Please select     Image: Add new PO	
100.0%	Total Allocated 🔞	L. Calit Charge
✓ Use the same p	ayment information for all add-on charges	Split Charge