

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

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Hide Filters

Requester	Core	PO Number	Expires On	Shared With	Amount Available	Attachments	Status	Action
Pamela Aaltonen	Cytometry Facility	PO12345678	Dec 31, 2025	0	\$189,900.00		Active Dec 10, 2024	⋮

Requester
 Lab
 Core Institution
 Core Facility
 Requester Institution
 Shared with
 Apply Filters

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

Add Purchase Order ✕

Fill out the fields below to store your purchase order. The PO name can be used as a quick reference. All fields are required except for PO name.

Purchase Order Details Share with Other Group Members

Who are you creating this purchase order for?

2 Start typing the name of the individual...

1 Search for Current customers only 3 Proceed

[Cancel](#)

- Fill in the PO information and click 'Save' or 'Save and Approve'

Add Purchase Order ✕

Fill out the fields below to store your purchase order. The PO name can be used as a quick reference. All fields are required except for PO name.

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) Lab (+1)

Search for Current customers only Proceed

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

Cytometry Facility

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+ Add Purchase Order

Active POs (1) Inactive POs (0) **Pending approval POs (1)** 1

Hide Filters

Keywords Go

Requester

Lab

Core Institution

Core Facility

Requester Institution

Shared with

Apply Filters

Reset Filters

Requester	Core	PO Number	Expires On	Shared With	Amount Available	Attachments	Status	Action
ADAM ABATE	Cytometry Facility	PO125874	Dec 31, 2034	0	\$1,000,000.00		Pending Approval	✓ ✕

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:
 Customer: Pamela Aaltonen Lab: Aaltonen1, Pamela (PUR) Lab
 Email: aaltonen@aurvise.edu.labi.com Phone: no phone

Labels:

Forms and Request Details (see bottom of list to add items to this request)

Item	Description	Quantity	Unit Price	Total	Billing Status	Work Status
Dec 11 01:08 PM	Analysis Fee (Hourly Rate) Service	<input type="text" value="1.0"/>	\$50.00	\$50.00	Not Ready To Bill	Proposed
Dec 11 01:08 PM	Decontamination Fee Service	<input type="text" value="1.0"/>	\$50.00	\$50.00	Not Ready To Bill	Proposed

Cost

Please provide the customer with a final quote for this request. The quote will be based on the services and charges you have added above and any "buffer" you have added. The "buffer" amount is for services or charges that you have not yet defined but that you expect to arise during the course of the request.

Add value or percent buffer:
 As percentage: % amount:

Quote (total predicted cost):
 (automatic total of any services, charges or buffer added to this request)

Payment Information

Please enter the Standing PO. You will have the opportunity to review the quote before being billed.

%: %
 Total Allocated:
 Standing PO:
 Add New PO:

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

General | Comments | Contacts

Reservation details Unsaved reservation - click save reservation Required forms: There are no forms required to make this reservation.

For: Instance 1 (logged time) - Pamela Aaltonen (no phone) - Aaltonen1, Pamela (PUR) Lab: (Unconfirmed)
 Lab: Aaltonen1, Pamela (PUR) Lab
 Created on: December 11, 2024 10:13

Event Notes: note visible to anyone
 Copy notes to the charge and display on the invoice

Times

	Start	End
Scheduled	Dec 11 2024 08:00 AM	Dec 11 2024 10:00 AM
Logged	Dec 11 2024 08:00 AM	Dec 11 2024 10:00 AM
Billable	Dec 11 2024 08:00 AM	Dec 11 2024 10:00 AM

Use and cost of reservation

Duration	Effective Rate	Amount	Use Type
2.0 hours	\$10.00	\$20.00	Equipment Usage
2.0 hours	Total Cost	\$120.00	External Accounts

Additional charges for this event

Payment information

Please select the payment method.

%: %
 Total Allocated:
 Standing PO:
 Add New PO:

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 payment method: ⓘ

			Amount
1	<input type="text" value="100.0"/> %	1 <input type="text" value="Standing PO"/> <input type="text" value="Please select"/>	
		Add new PO 2	
	100.0%	Total Allocated ⓘ	
	<input checked="" type="checkbox"/> Use the same payment information for all add-on charges		<input type="button" value="+ Split Charge"/>