

External Standing Purchase Order (PO) Manual

Standard Operating Procedure 152 for Pitt iLab System

iLab Role: Core, Organization, or Institutional Administrator

Revision #: 0

Date: 9/2025

Contents

Purpose:	1
Scope:	1
Creating a New PO:	1
Approving Pending POs:	3
Using the PO in a Request:	4
Using the PO for Equipment Charges:	4
Creating a New PO While Making a Request or Reservation:	5

Purpose:

This SOP describes how to create and approve an external standing PO, and how to use it when making a service request or reservation on behalf of a core user.

Scope:

This SOP should be followed by a core administrator. Organization and Institutional Administrator roles also have the capability in iLab to perform these steps.

Creating a New PO:

1. Navigate to the core page from the left side navigation menu and select the 'PO' tab.

External Standing Purchase Order (PO) Manual

2. Click on 'New Purchase Order'.

The screenshot shows the 'Cytometry Facility' web application. At the top, there is a navigation menu with links: 'About Our Core', 'Schedule Equipment', 'Request Services', 'View All Requests', 'Reservations', 'People', 'Reporting', 'PO (1)', 'Charge Entry', and 'Administration'. Below the navigation, there are tabs for 'Active POs (1)', 'Inactive POs (0)', and 'Pending approval POs (0)'. A sidebar on the left contains a 'Hide Filters' section with various filter options like 'Keywords', 'Requester', 'Lab', 'Core Institution', 'Core Facility', 'Requester Institution', and 'Shared with'. The main content area displays a table of Purchase Orders with columns: 'Requester', 'Core', 'PO Number', 'Expires On', 'Shared With', 'Amount Available', 'Attachments', 'Status', and 'Action'. One PO is listed with Requester 'Pamela Aaltonen', Core 'Cytometry Facility', PO Number 'PO12348574', Expires On 'Dec 31, 2025', Shared With '0', Amount Available '\$189,900.00', and Status 'Active Dec 20, 2024'. A blue button labeled 'Add Purchase Order' with a red circle and the number 2 is located in the top right corner of the main content area.

3. Uncheck the option 'Search for Current customers only'.
4. Search for the customer by first and last name. Select the customer and click 'Proceed'.

The screenshot shows the 'Add Purchase Order' dialog box. It has a title bar with 'Add Purchase Order' and a close button. Below the title bar, there is a text area with instructions: '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.' There are two tabs: 'Purchase Order Details' (selected) and 'Share with Other Group Members'. Under the 'Purchase Order Details' tab, there is a text input field with the placeholder text 'start typing the name of the individual...'. Below the input field, there is a checkbox labeled 'Search for Current customers only' which is unchecked. To the right of the checkbox is a 'Proceed' button. A red circle with the number 2 points to the input field, a red circle with the number 1 points to the checkbox, and a red circle with the number 3 points to the 'Proceed' button. At the bottom right of the dialog box, there is a 'Cancel' button.

5. Fill out the required PO information (PO Number, Initial Amount, and Expiration Date). Adding the PO name can be used as a quick reference but is not a required field.
6. Click 'Save' if the PO is pending approval from the core. Click 'Save and Approve' if approval has already been granted from the core. See next section for approving pending POs.

External Standing Purchase Order (PO) Manual

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

Approving Pending POs:

1. Navigate to the core page from the left side navigation menu and select the 'PO' tab.
2. Click on the 'Pending approval POs' tab.

Cytometry Facility

About Our Core | Schedule Equipment | Request Services | View All Requests | Reservations | People | Reporting | Billing | **PO (1)** | Charge Entry | Administration

[+ Add Purchase Order](#)

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

Hide 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	✓ x

Requersors: Lab, Core Institution, Core Facility, Requester Institution, Shared with, Apply Filters, Reset Filters

3. Click on the PO number to review or edit the PO information if necessary.
4. Click on the green checkmark under the 'Action' column to approve.

External Standing Purchase Order (PO) Manual

Using the PO in a Request:

1. Initiate a request on behalf of the external user that is associated with the PO as entered in the [above 'Creating a New PO' section](#).
2. In the 'Payment Information' section, select 'Standing PO' from the first drop down menu.
3. Select the specific PO from the second drop down menu as entered in the above section.

The screenshot displays the 'Project Request' form. At the top, it shows the request name as 'CF-PA-[CID]' and customer information for Pamela Aaltonen Lab. Below this is a 'Labels' section with an empty input field. The 'Forms and Request Details' section lists two services: 'Analysis Fee (Hourly Rate)' and 'Decontamination Fee', both dated Dec 11 at 01:08 PM. A 'View Form' button is present with a note: 'Please give this form a name'. The 'Cost' section prompts the user to provide a final quote, with options to 'Add value or percent buffer' (set to 0%) and a 'Quote (total predicted cost)' of \$100.00. The 'Payment Information' section asks for the Standing PO, showing a table with a 100.0% allocation to 'PO12348574 (Approved)'. A 'Split Charge' button is at the bottom right.

Using the PO for Equipment Charges:

1. Initiate a reservation on behalf of the external user that is associated with the PO as entered in the [above 'Creating a New PO' section](#).
2. In the 'Payment Information' section, select 'Standing PO' from the first drop down menu.

External Standing Purchase Order (PO) Manual

3. Select the specific PO from the second drop down menu as entered in the above section.

The screenshot displays a reservation management interface with the following sections:

- General:** Includes tabs for 'General', 'Comments', and 'Contacts'. The main heading is 'Reservation details' with a red 'Unsaved reservation - click save reservation' warning.
- Reservation details:** Shows 'For: Instance 1 (logged time) - Pamela Aaltonen, (no phone) - (Aaltonen1, Pamela (PUR) Lab) - (Unconfirmed)', 'Lab: Aaltonen1, Pamela (PUR) Lab', and 'Created on: December 11, 2024 15:13'. There is an 'Event Notes' text area and a dropdown menu set to 'note visible to anyone' with a checked option 'Copy notes to the charge and display on the invoice'.
- Times:** A table showing scheduled, logged, and billable times.
- Use and cost of reservation:** A table showing duration, effective rate, amount, and use type.
- Additional charges for this event:** A section with an 'Add additional service charge' button.
- Payment information:** A section for selecting a payment method, showing a 100.0% allocation to a 'Standing PO' (PO12348574 (Approved)) with an 'Add new PO' link.
- Buttons:** 'Save Reservation', 'Cancel Changes', and 'Save & Confirm Usage' are located at the bottom.

Duration	Effective Rate	Amount	Use Type
2.0 hours	\$60.00	= \$120.00	Default usage type Base Rate
2.0 hours	Total Cost	\$120.00	External Academic

	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	

Creating a New PO While Making a Request or Reservation:

1. There is an option to create a new PO while initiating a request or reservation. First select 'Standing PO' from the first drop down menu in the 'Payment information' section.
2. Click on the 'Add New PO' link next to the second drop down menu.
3. Follow the steps as outlined in the [above 'Creating a New PO' section](#). The PO will appear in the PO tab for approval.

External Standing Purchase Order (PO) Manual

Payment information

Please select the payment method: ?

%	Amount
1 100.0 %	Standing PO ▾ Please select ▾ Add new PO
100.0%	Total Allocated ?

Use the same payment information for all add-on charges

[+ Split Charge](#)

Approval Authorizations	Signature	Date
Robert Cunningham, <i>Vice Chancellor for Research Infrastructure, University of Pittsburgh</i>		7 Oct 2025
Ashley Zyhowski, <i>Research Project Manager, University of Pittsburgh</i>		7 Oct 2025