


Lab Admin Forum

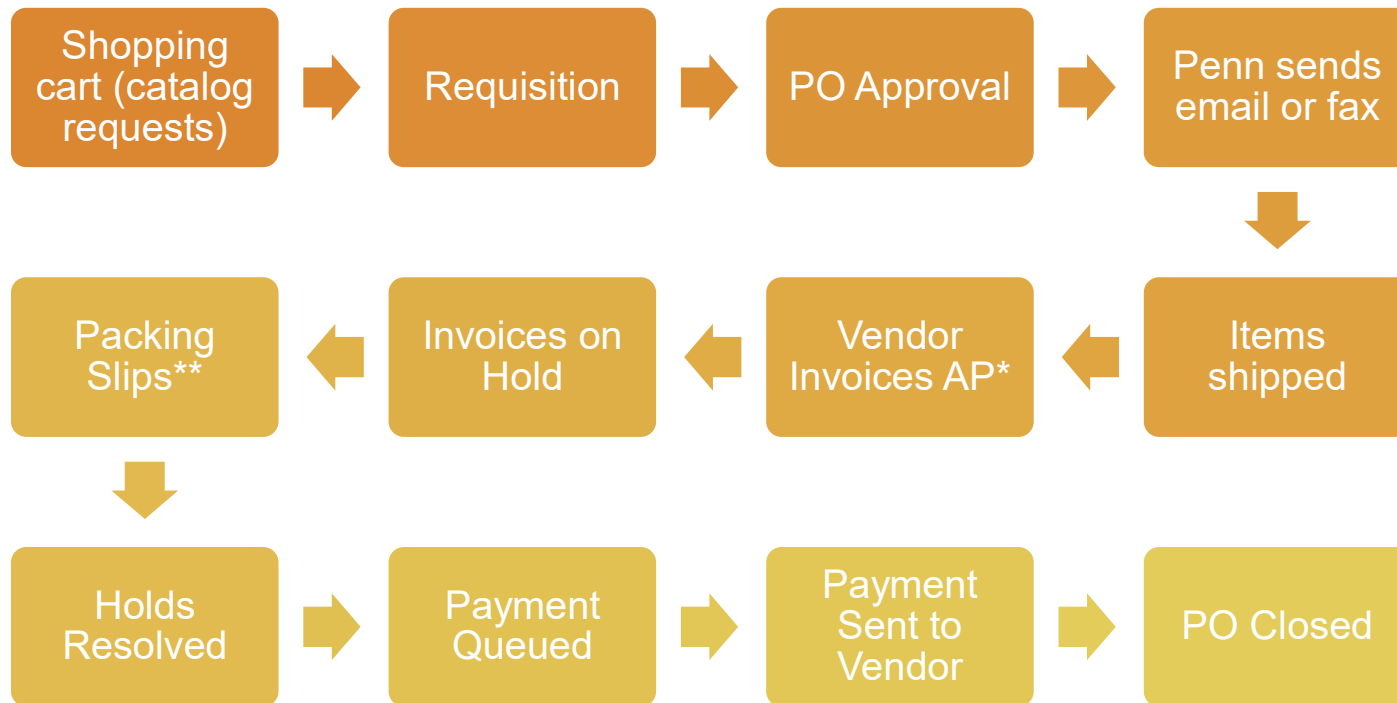
Purchase Order Explanations
Review Process and Procedures
Best Practices



Let's reduce
everyone's
burden!



P.O. Life Cycle



* To cancel an item or purchase order, please contact the vendor first and then forward their confirmation to the NSCI-business@lists.upenn.edu so that we can also remove it from our system.

** Please forward all packing slips to 202 CRB



Vendor Information

Look up information BEFORE starting non-marketplace P.O.

- Requisitioner
 - Requisitions Home Page
 - Supplier List
 - PO Action History
 - Shipment Information

Search Supplier List

Simple Search

Note that the search is case insensitive

Supplier Name: %emscos%

Supplier Number:

Supplier Type:

Go Clear

Supplier Name	Supplier Number	Taxpayer ID	Supplier Type	Pay Sites	P.O. Sites	Minority Owned	Local Community Owned	Woman Owned	Small Business	Limited Engagement	Contract
EMSCO SCIENTIFIC ENTERPRISES, INC.	47533	*****3258	CORPORATION/BUSINESS ENTITY	Y	Y	African Amer	Y	N	Y		Y
EMSCO/FISHER	610895	*****6023	CORPORATION/BUSINESS ENTITY	Y	Y	African Amer	Y	N	Y		Y

Pay Sites

Name	Addr1	Addr2	City	State	Zip Code	Phone	Fax	Email Address	Payment Method	Terms
PHILADELPHIA-2	PO BOX 28032		PHILADELPHIA	PA	19131	(215)4775601	(215)477-2526	custserv@emscoscientific.com	CHECK	Net 7
PHILADELPHIA-1	2ND FLOOR BUILDING 3	51ST & PARKSIDE AVENUE	PHILADELPHIA	PA	19131	(215)4775601	(215)4772526	custserv@emscoscientific.com	CHECK	Net 7
BOSTON	ACCT #076144-032	PO BOX 3648	BOSTON	MA	02241-3648				CHECK	Net 7

Terms= Number of days between AP receiving the invoice and processing payment.

Purchasing Sites

Name	Addr1	Addr2	City	State	Zip Code	Phone	Fax	Email Address
PHILADELPHIA-1	2ND FLOOR BUILDING 3	51ST & PARKSIDE AVENUE	PHILADELPHIA	PA	19131	(215)4775601	(215)4772526	custserv@emscoscientific.com

Only when the vendor P.O. Site = N can a purchasing card be used.



Account Favorites

- User Preferences (once you are Requisitioner)
- My Profile
- Add a Favorite Charge Account(s) if desired, by clicking on [Add a Row]
- Add as many accounts as needed. Be sure to click on [Apply] periodically.
 - Favorites contain an object code i.e. 5228 (lab supplies)

The screenshot shows the 'Receiving' page in the bsn financials system. The 'Favorite Charge Accounts' section is highlighted, showing a table with columns for 'Select Account', 'Set as Primary', 'Pin Accounting Headfield', 'Primary', and 'Delete'. A callout box points to the 'Set as Primary' button, stating: 'Be sure to click on [Set as Primary] for one of the Favorite Charge Accounts'. Another callout box points to the 'Need By Date Offset' field, stating: 'Note: The Need By Date Offset defaults to 2 days automatically. Feel free to change here or per request.' The 'Add a Row' button is circled in blue. The 'Apply' button is visible at the bottom right of the form.

Select Account	Set as Primary	Pin Accounting Headfield	Primary	Delete
[Select Account]	[Set as Primary]	[Pin Accounting Headfield]	[Primary]	[Delete]



Non-Marketplace Item Type: Quantity vs Amount

- Goods Billed By Quantity- when you are ordering items that will be billed by the supplier using the quantity i.e. 10 cases of gloves
- Goods Or Services Billed By Amount- when you are ordering items that will be billed by the supplier using the amount i.e. catering or service contracts
- Services billed by quantity- **DO NOT USE**



Category Matters Too!
Frequently Used Codes:
COMPUTING.SOFTWARE
RESEARCH.HAZARDOUS
SERVICES.CATERING
SERVICES.PRINTING
SERVICES.REPAIRS
SERVICES.WASTE DISPOSAL

bon financials Requisitions

Shopping Cart Home Logout User Preferences Help

Shop Requisitions Receiving

Marketplace Request Non-Marketplace Request

Non-Marketplace Request

* Indicates required field

* Item Type Goods billed by quantity

* Item Description Goods billed by quantity
Goods or services billed by amount
Services billed by quantity

* Category RESEARCH.LABORATORY

* Quantity Example: Enter # of items

* Unit of Measure Each
Example: "Each"

* Unit Price Example: Enter Cost Per UOM

* Supplier Name

* Site

Supplier Item #

Additional Information (Ex: Quote #, Promo code)

Supplier Contact Name

Supplier Contact Phone

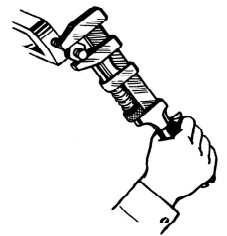
Clear All Add to Cart

Shopping Cart
Your cart is empty.

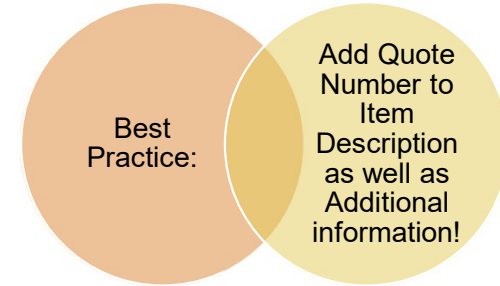
Clear All Add to Cart

Shop Requisitions Receiving Shopping Cart Home Logout User Preferences Help

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PO Approvals



What you enter:

Non-Marketplace Request
* Indicates required field

* Item Type: Goods billed by quantity

* Item Description: [Text Field]

* Category: [Dropdown] Example: RESEARCHLABORATORY

* Quantity: [Text Field] Example: Enter # of Items

* Unit of Measure: [Dropdown] Example: "Each"

* Unit Price: [Text Field] Example: Enter Cost Per UOM

* Supplier Name: [Text Field]

* Site: [Text Field]

Supplier Item #: [Text Field]

Additional Information: [Text Field] (Ex. Quote #, Promo code)

Supplier Contact Name: [Text Field]

Supplier Contact Phone: [Text Field]

Buttons: Clear All, Add to Cart

We do not see:
Category, Unit Price, Supplier Site, Additional information, Supplier Contact information, Ship-To Location

What we see:

Requisition# 3008126 for USD 242.63 USD requires your approval.

Buttons: Approve, Approve And Forward, Forward, Reject

From: COWELL, ALEXANDRIA
To: ABDULLAH, KAREEM
Sent: 18-Oct-2019 15:50:35
ID: 22654916

Description: B&H - Surge Protector, 2TB Internal HDD
Requisition Total: 242.63 USD

Line	Item Description	Supplier	UOM	Quantity	Account Code Combination	Line Amount (USD)
1	BP112230-08 PivotPlug 12-Outlet Surge Protector BEBP1122300	B & H PHOTO & ELECTRONIC CORP.	Each	4	400-4114-4-573165-5249-2810-4022	130.20
2	2TB Desktop Performance 7200 rpm SATA III 3.5 Internal HDD Retail Kit WEIDDP2	B & H PHOTO & ELECTRONIC CORP.	Each	1	400-4114-4-573165-5223-2810-4022	112.43

Approval History

Sequence	Who	Action	Date	Note
2	COWELL, ALEXANDRIA J 23087203	Submit	18-OCT-2019	
3	ABDULLAH, KAREEM 45585569			

References

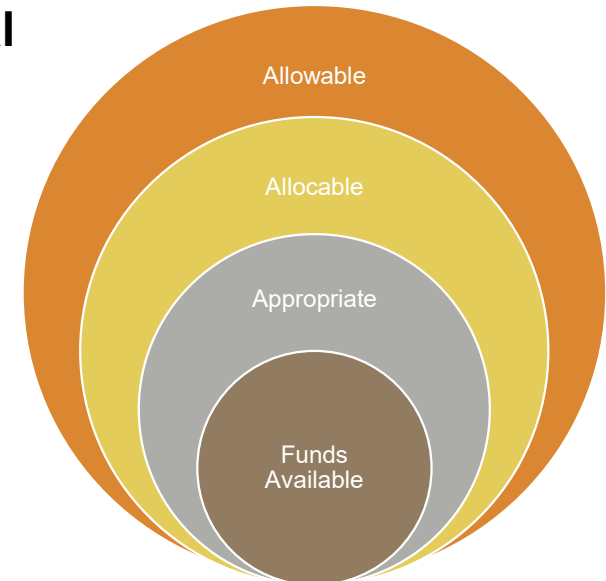
- Requisition Detail
- Update requisition

We can only change:
Quantity and Account #



Purchase Order Request Form

- The purpose of this form to show authorized approval for an order on the appropriate account(s).
 - One vendor per form
 - Include requisition number
 - Enter only quantity and unit price; extended price automatically calculated and grand total (from both pages).
 - Complete with full and proper vendor name (DSHB = University of Iowa)
 - Include scientific justification if dual purpose (paper towels are blotting materials; -80 freeze markers)
 - You do not need to enter the full 26-digit code but a nickname or unique reference #. (Song R35; Opto)
 - Fill and Sign or Digital Signature preferred



What is missing?

Date of Request: 7/13/2023 Req#: 3654440
 Requestor Name: [Redacted] Requestor Phone#: 876966855
 Vendor Name: BioServ
 Is this order based on a quote or invoice? No Yes, see attached

Qty	Item#	Description	Unit Price	Extended Price
1		Fruit Crunchies	114.37	114.37
				Subtotal Page 2
				Grand Total 114.37

If you have more than 4 items, please continue your list on page 2

These items are for Research: For treats during trials.
Provide purpose or relevance to project being charged such as materials for animals studies, antibodies, equipment (over \$5K), and reagents

General Lab / Office use
(such as toner, printer paper, general cleaning supplies, paper towels used in research)

My signature below confirms that the above items have a direct relationship to the funding source and the following fund(s):

Account(s) to charge: R37, Opto, Penalty Kick
Provide Sponsor Ref Number (R01NGxxxxxx), Fund #, or Nickname of account

PI/Designee Name and Signature: 

Date of Request: Req#: [Redacted]
 Requestor Name: [Redacted] Requestor Phone#: 2675673021
 Vendor Name: A.M Systems Inc
 Is this order based on a quote or invoice? No Yes, see attached

Qty	Item#	Description	Unit Price	Extended Price
1	793500	PFA Insulated Stainless Steel wire (Coated)	136	136
1	793600	Stainless Steel wired annealed	55	55
				Subtotal Page 2
				Grand Total 210.40


If you have more than 4 items, please continue your list on page 2

These items are for Research: EEG/EMG implants
Provide purpose or relevance to project being charged such as materials for animals studies, antibodies, equipment (over \$5K), and reagents

General Lab / Office use
(such as toner, printer paper, general cleaning supplies, paper towels used in research)

My signature below confirms that the above items have a direct relationship to the funding source, and it is ok to charge the following fund(s):

Account(s) to charge: Franz R01
Provide Sponsor Ref Number (R01NGxxxxxx), Fund #, or Nickname of account

PI/Designee Name and Signature: 

Date of Request: 08/22/2022 Req#: [Redacted]
 Requestor Name: [Redacted] Requestor Phone#: [Redacted]
 Vendor Name: DSHB
 Is this order based on a quote or invoice? No Yes, see attached

Qty	Item#	Description	Unit Price	Extended Price
2	E7	anti beta tubulin concentrate	75	150.00
				0.00
				0.00
				0.00
				Subtotal Page 2 0.00
				Grand Total 150.00

If you have more than 4 items, please continue your list on page 2

These items are for Research:
Provide purpose or relevance to project being charged such as materials for animals studies, antibodies, equipment (over \$5K), and reagents

General Lab / Office use
(such as toner, printer paper, general cleaning supplies, paper towels used in research)

I hereby confirm that the above items have a direct relationship to the funding source, and it is ok to charge the following fund(s):

Account(s) to charge: 1/5 NSF; 2/5 R01; 2/5 R35
Provide Sponsor Ref Number (R01NGxxxxxx), Fund #, or Nickname of account

PI/Designee Name and Signature: 



Specialty Purchase Orders

- Blanket/Standing Orders (Curtis Bay, Ready Refresh, AWS, Cintas, Addgene, AirGas)
 - Complete dollar value for 3-12 months of services but should not cross fiscal or grant years.
 - New p.o. must be generated when current p.o. fully spent or when notified by Business Office (change of fund number, change of pricing)
 - Work with individual vendors to complete orders as needed (Addgene website, AirGas delivery schedule)
- Equipment: A single item over \$5,000 and a useful life greater than 1 year.
 - In the email with the form and quote where applicable, you must include the future building location and room number, PI name and a contact phone number.
- Independent Contracts: ***Prior*** to any work being completed, contractor and lab contact must complete “Independent Service Provider Questionnaire” for Departmental and HR review and approval. Contractor must be added to vendor system and a P.O. be processed for the contractor to invoice against, in order to receive payment.



Purchasing Card Form

- New form forthcoming
- Confirm vendor not eligible for BEN Purchase Order
 - Some items are listed as **restricted** in Amazon as they should be purchased through BEN.
- Ensure URL(s) or complete item description is included
- Clearly list quantity requested for each item
- Include account(s) to charge name/number
- Fill and Sign or Digital Signature preferred
- List ship-to contact name and address as well as shipping method, if rush delivery is needed



Have a question? Just ask; call or stop by!

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- Eric Mayer
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Eric.Mayer@pennmedicine.upenn.edu
215-898-5142
- Wade Kirkpatrick
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Wade.Kirkpatrick@pennmedicine.upenn.edu
215-898-8754



Future Topics

- Concur: Booking Flights, Submitting Reports, Per Diem, Receipts, Warnings
- Purchasing Card / Travel Card / GreenPhire
- Express Mailing (eSHIP)
- Approvals (Poster Printing, World Travel Flights, Alcohol, OSL, Hotels, ULAR)
- Service Centers: what are they, where are they and how to access
- Our mail room and gaining access 200D CRB
- ???

