

Using Purchase Orders in iLab

For questions or concerns please contact iLab.Support@penmedicine.upenn.edu

Purchase Orders for Penn Staff and PIs

- [I am a Penn PI or staff member who needs to upload a PO for use at an external institution.](#)
- [I am a Penn PI or staff member who needs to attach an existing iLab PO to my request.](#)
- [I work at a Penn core facility and would like to upload a PO on behalf of a user.](#)
- [I work at a Penn core facility and need to approve a PO uploaded to my core by an external user.](#)

Purchase Orders for External (Non-Penn) Staff and PIs

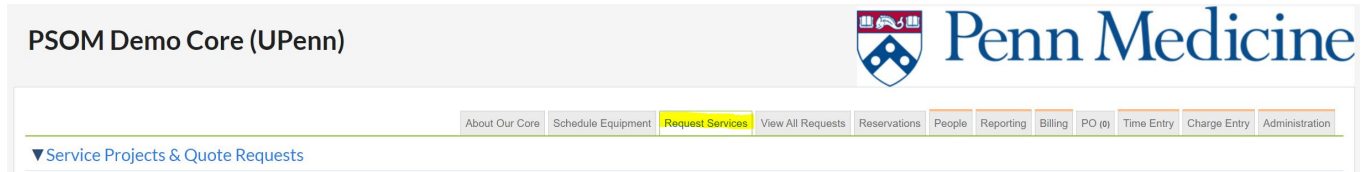
- [I am an external \(non-Penn\) PI or staff member who needs to upload a PO for use at Penn.](#)
- [I am an external \(non-Penn\) PI or staff member who needs to attach an existing iLab PO to my request.](#)

I am a Penn PI or staff member who needs to upload a PO for use at an external institution.

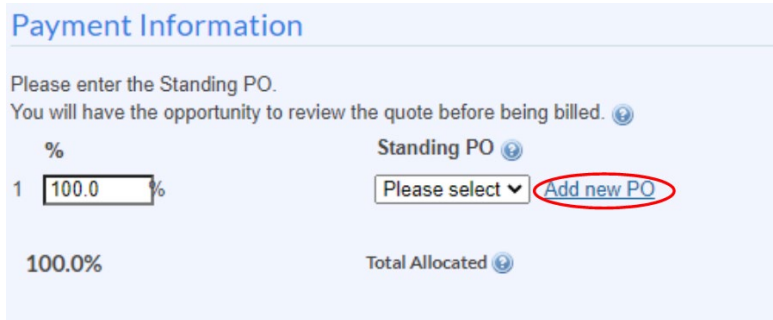
- If you would like to attach a new PO to a new request, click [here](#).
- If you would like to attach a new PO to a previously submitted request, click [here](#).

Attaching a new PO to a new request

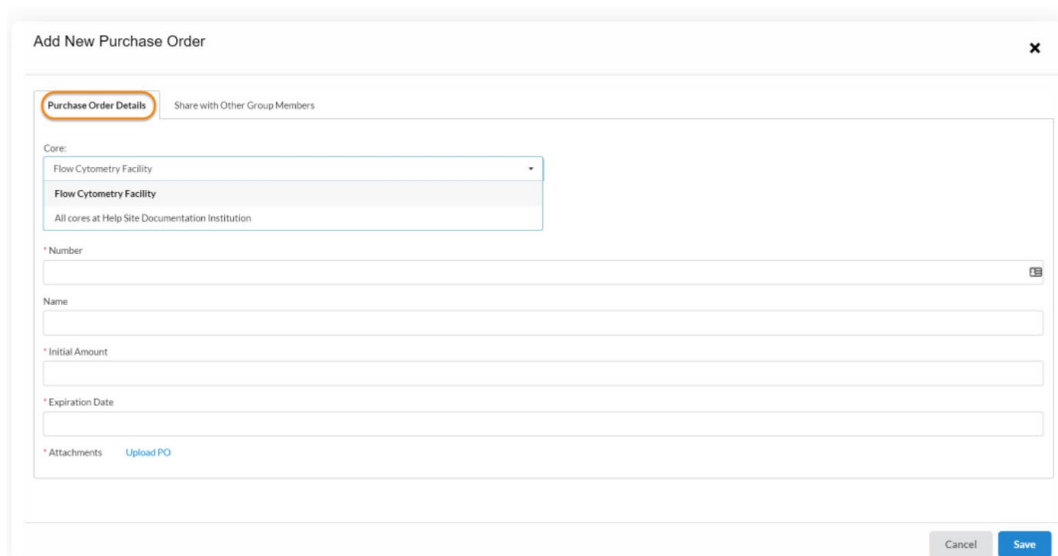
1. Visit <https://med-upenn.corefacilities.org/landing/264> to login to iLab with your PennKey.
2. Visit the core facility from which you would like to request services and click the “Request Services” tab.



3. Begin the process of creating your request. When you reach the “Payment Information” portion of the request, please select “Add new PO.”



4. Complete all fields on the “Purchase Order Details” tab. Please note you may select a specific core to use this PO, or you may choose “All cores at this institution” to allow this PO to be used at all cores within the institution. Once saved, the PO cannot be updated to include additional facilities. In the attachments field, you may need to upload documentation that can be used by the core or the institutional approver to verify the PO (if required by the institution).



5. Click the "Share with Other Group Members" tab, to indicate if this PO may be used by other members in your lab/group.

Add New Purchase Order ✕

Purchase Order Details **Share with Other Group Members**

Group: Admin Lab (HCOM) ▾

Select All

Jackie Berge
 Carmel Denesik
 Mozelle Pollich
 Amira Becker
 Tressie Nicolas

6. Once you have completed both tabs, click on "Save" to proceed.
7. If you now select the "Standing PO" drop-down, you will see the newly created PO listed, but with an (Unapproved) status behind it. The PO will now be routed to the core or an institutional administrator for approval.

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

Standing PO ⓘ

Please select ▾ [Add new PO](#)

123456 (Unapproved) information

8. Once approved, you can return to the payment option and select it as a valid payment method.

Payment Method ⓘ 123456 (Approved) ▾ [Add new PO](#)

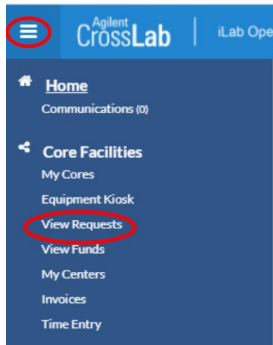
make default for project?

payment notes ⓘ

Attaching a new PO to a previously submitted request

1. Visit <https://med-upenn.corefacilities.org/landing/264> to login to iLab with your PennKey.

2. Select "View Requests" from the left panel menu. This will show your requests across all core facilities.



3. Click the green "dollar sign" icon next to the request you wish to update, then click the "Add new PO" link.

Displaying 2 out of 2 results. (Page 1 of 1)

date	for	service id	status	payment number	cost
▶ Nov 12 2021 (Nov 12 2021)	Jiju Mathew UPenn External Test Lab	PSOMDC(UP)-JM	Payment Information		
▶ Oct 28 2021 (Oct 28 2021)	April Weakley Soslowsky, Lou (UPENN) Lab	PSOMDC(UP)-AM	Only charges with a pending billing status are displayed		

Charge Billing Status Standing PO Amount
Selected charge(s) total: \$0.00

Amount currently due: \$0.00

Update payment info for selected (2) charges

Standing POs 1 100.0 % Please select **Add new PO**

100.0% Total Allocated

Default to this payment method

payment notes

save cancel

4. Complete all fields on the "Purchase Order Details" tab. Please note you may select a specific core at which to use this PO, or you may choose "All cores at this institution." Once saved, the PO cannot be updated to include additional facilities. In the attachments field, you may need to upload documentation that can be used by the core or the institutional approver to verify the PO (if required by the institution).

The screenshot shows a web form titled "Add New Purchase Order" with a close button (X) in the top right corner. The form has two tabs: "Purchase Order Details" (which is selected and highlighted with an orange border) and "Share with Other Group Members". Below the tabs, there are several input fields: a "Core:" dropdown menu with "Flow Cytometry Facility" selected, a "Number" field, a "Name" field, an "Initial Amount" field, and an "Expiration Date" field. At the bottom left, there is an "Attachments" section with a link to "Upload PO". At the bottom right, there are "Cancel" and "Save" buttons.

5. Click the "Share with Other Group Members" tab, to indicate if this PO may be used by other members in your lab/group.

The screenshot shows the same "Add New Purchase Order" form, but now the "Share with Other Group Members" tab is selected and highlighted with an orange border. The "Purchase Order Details" tab is now inactive. The form content has changed: the "Group:" dropdown is set to "Admin Lab (HCOM)", and there is a "Select All" checkbox followed by a list of five names with checkboxes: Jackie Berge, Carmel Denesik, Mozelie Pollich, Amira Becker, and Tressie Nicolas. The "Cancel" and "Save" buttons remain at the bottom right.

6. Once you have completed both tabs, click "Save" to proceed.
7. If you now select the "Standing PO" drop-down, you will see the newly created PO listed, but with an (Unapproved) status behind it. The PO will now be routed to the core or an institutional administrator for approval.

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

Standing PO ?

Please select Add new PO

Please select
123456 (Unapproved) information

9. Once approved, you can return to the payment option and select it as a valid payment method.

Payment Method 123456 (Approved) Add new PO
 make default for project?

payment notes

I am a Penn PI or staff member who needs to attach an existing iLab PO to my request.

- If you would like to attach a standing PO to a new request, click [here](#).
- If you would like to attach a standing PO to a previously submitted request, click [here](#).

Attaching a standing PO to a new request

1. Visit <https://med-upenn.corefacilities.org/landing/264> to login to iLab with your PennKey
2. Visit the core facility from which you would like to request services and click the “Request Services” tab.

[About Our Core](#) [Schedule Equipment](#) [Request Services](#) [View My Requests](#) [Contact Us](#)

3. Begin the process of creating your request. When you reach the “Payment Information” portion of the request, select the PO you wish to use from the “Standing PO” dropdown.

Payment Information

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

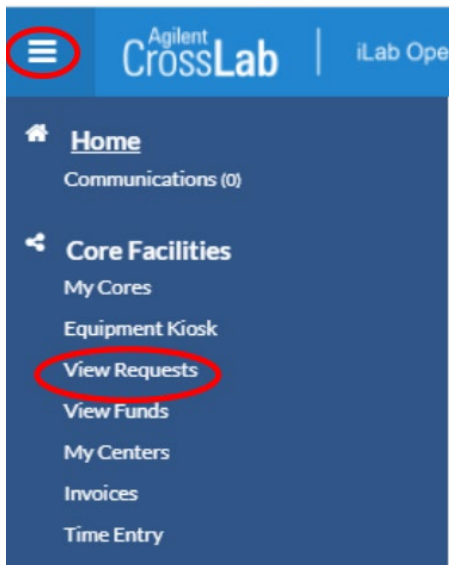
%
1 100.0 %
100.0%

Standing PO ?
Please select Add new PO
Please select
123456 (Approved)
total Allocated ?

4. Complete the process of submitting your request.

Attaching a standing PO to a previously submitted request

1. Visit <https://med-upenn.corefacilities.org/landing/264> to login to iLab with your PennKey.
2. Select “View Requests” from the left panel menu. This will show your requests across all core facilities.

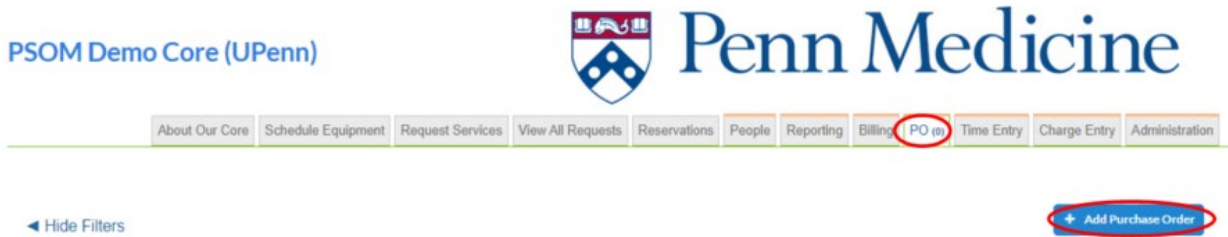


3. Click the green “dollar sign” icon next to the request you wish to update, select the appropriate PO from the “Standing POs” dropdown, and click “save.”

Charge	Billing Status	Standing PO	Amount
Selected charge(s) total: \$ 0.00			
Only charges with a pending billing status are displayed			
Amount currently due: \$0.00			
Update payment info for selected (▼) charges			
Standing POs	1	100.0 %	
		100.0%	

Uploading a PO on behalf of a user.

1. Visit <https://med-upenn.corefacilities.org/landing/264> to login to iLab with your PennKey.
2. Click the “PO” tab on your core facility dashboard, then click “Add Purchase Order.”



3. Enter the name of the individual you for whom you are creating the purchase order for, then click “Proceed.”

Add Purchase Order



In order to store your Purchase Order, please fill out the fields below. All fields are required except PO Name. The PO name can be used as a quick reference.

Purchase Order Details | Share with Other Group Members

Who are you creating this purchase order for?

Researcher, Marie - marie.researcher@ilabx.com - 123-4567 - iLab Test (Testing) Lab

Search for Current customers only

Proceed

Cancel

4. Complete all fields on the “Purchase Order Details” tab, then click “Upload PO.”

Purchase Order Details | Share with Other Group Members

Who are you creating this purchase order for?

Researcher, Marie - marie.researcher@ilabx.com - 123-4567 - iLab Test (Testing) Lab

Search for Current customers only

Proceed

Core:

PSOM Demo Core (UPenn)

* Number

12345

Name

Project Name

* Initial Amount

2500

* Expiration Date

Jun 30, 2022

* Attachments **Upload PO**

5. Penn requires you to upload documentation of the purchase order. This can be a formal document provided by the user, or simply an email from them confirming the purchase order number, expiration date, and amount. Click “Choose File” to upload the PO documentation.

* Attachments **Upload Another PO**

Attachment:

Choose File No file chosen

6. If the user would like other members of their lab or group to also have access to this PO, please click the “Share with Other Group Members” tab and add the additional users as appropriate before clicking “Save and Approve.”

Add Purchase Order



In order to store your Purchase Order, please fill out the fields below. All fields are required except PO Name. The PO name can be used as a quick reference.

Purchase Order Details **Share with Other Group Members**

Group: iLab Test (Testing) Lab

Select All

Julie Cafferata
 Alex Researcher
 Audrey Bahrani
 Fake External
 Kai Nakamura
 UF Customer

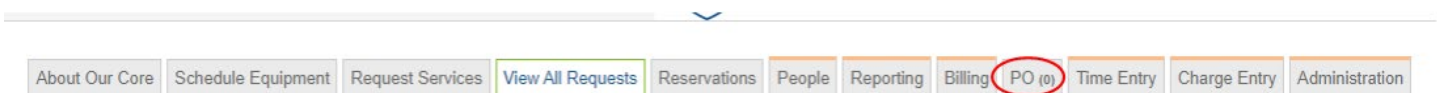
Cancel **Save and Approve** Save

7. If the user does not require other members of their lab or group to access this PO, you may click “Save and Approve” from the “Purchase Order Details” tab.
8. The user will now be able to attach the PO to their request, or you may attach it for them by clicking the green dollar sign next to the request as it appears on your core facility “View All Requests” tab.

Date	Requester	Core	Status	Amount	Payment Information
Nov 12 2021 (Nov 12 2021)	Jiju Mathew UPenn External Test Lab	PSOMDC(UP)-JM-45	Processing	123456	Payment Information Charge Billing Status Standing PO Amount Selected charge(s) total: \$0.00
Aug 23 2021 (Aug 23 2021)	Jiju Mathew Mathew_Jiju (UPENNI) Lab	DC(UP)-JM-41	Processing	400-4000	Only charges with a pending billing status are displayed Amount currently due: \$0.00
Apr 26 2021 (Apr 26 2021)	Marie Researcher iLab Test (Testing) Lab	DC(UP)-MR-[CID] Consultation	Waiting to Submit to Researcher		Update payment info for selected (#) charges Standing POs: 100.0% 100.0%
Jan 25 2021 (Jan 25 2021)	Portland Researcher iLab Test (Testing) Lab	DC(UP)-PR-26	Processing	789456	Default to this payment method
Jan 14 2021 (Jan 14 2021)	Sally Researcher iLab Test (Testing) Lab	DC(UP)-SR-23	Processing		payment notes
Jan 13 2021 (Jan 13 2021)	Jiju Mathew Mathew_Jiju (UPENNI) Lab	DC(UP)-JM-22	Processing		

Approving POs uploaded to your core facility by an external user.

1. Visit <https://med-upenn.corefacilities.org/landing/264> to login to iLab with your PennKey.
2. Click the “PO” tab for your core facility.



3. Locate the PO you wish to approve and click the green checkmark icon that appears in the right-hand column.

Requester	Core	PO Number	Expires On	Shared With	Amount Available	Attachments	Status	Action
Alice Researcher	PSOM Demo Core (UPenn)	123456	May 26, 2022	0	\$2,500.00		Pending Approval	

4. Enter an optional approval note and click “Submit.”

Status	Action
Pending Approval	✓ ✕

✕ Please enter an approval note. (optional)

Submit

5. The user will now be able to attach the PO to their request, or you may attach it for them by clicking the green dollar sign next to their request as it appears on your core facility “View All Requests” tab.

Date	Requester	Lab	Status	Amount	Payment Information																																				
Nov 12 2021 <small>(Nov 12 2021)</small>	Jiju Mathew UPenn External Test Lab	PSOMDC(UP)-JM-45	Processing	123456	<div style="border: 1px solid gray; padding: 5px;"> <p>Payment Information</p> <table border="1"> <thead> <tr> <th>Charge</th> <th>Billing Status</th> <th>Standing PO</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td colspan="4">Selected charge(s) total: \$0.00</td> </tr> <tr> <td colspan="4">Only charges with a pending billing status are displayed</td> </tr> <tr> <td colspan="4">Update payment info for selected (#) charges</td> </tr> <tr> <td>Standing POs</td> <td>100.0 %</td> <td> <div style="border: 1px solid gray; padding: 2px;"> Please select Please select 123456 (Approved) </div> </td> <td> <div style="border: 1px solid gray; padding: 2px;"> Add New PO Split Charge </div> </td> </tr> <tr> <td colspan="4">Amount currently due: \$0.00</td> </tr> <tr> <td colspan="4">Default to this payment method <input checked="" type="checkbox"/></td> </tr> <tr> <td colspan="4">payment notes</td> </tr> <tr> <td colspan="4" style="text-align: right;">save cancel</td> </tr> </tbody> </table> </div>	Charge	Billing Status	Standing PO	Amount	Selected charge(s) total: \$0.00				Only charges with a pending billing status are displayed				Update payment info for selected (#) charges				Standing POs	100.0 %	<div style="border: 1px solid gray; padding: 2px;"> Please select Please select 123456 (Approved) </div>	<div style="border: 1px solid gray; padding: 2px;"> Add New PO Split Charge </div>	Amount currently due: \$0.00				Default to this payment method <input checked="" type="checkbox"/>				payment notes				save cancel			
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I am an external (non-Penn) PI or staff member who needs to upload a PO for use at Penn.

- If you would like to attach a new PO to a new request, click [here](#).
- If you would like to attach a new PO to a previously submitted request, click [here](#).

Attaching a new PO to a new request

1. Login to iLab.

If you do not already have an iLab account, you may register for one by visiting <https://med-upenn.corefacilities.org/landing/264> and clicking the blue “sign-up” button on the upper right of the page.



Click the option to register for an account as a non-UPenn user, and complete the prompts as required.

UPenn user :
Click [here](#) to login or register using your institute login and password.

Not a UPenn user?
Click [here](#) to signup for an iLab account.

2. Visit the core facility from which you would like to request services and click the “Request Services” tab.

3. Begin the process of creating your request. When you reach the “Payment Information” portion of the request, please select “Add new PO.”

Payment Information

Please enter the Standing PO.

You will have the opportunity to review the quote before being billed. ⓘ

%	Standing PO ⓘ
1 100.0 %	Please select ▼ Add new PO
100.0%	Total Allocated ⓘ

4. Complete all fields on the “Purchase Order Details” tab. Please note you may select a specific core to use this PO, or you may choose “All cores at this institution” to allow this PO to be used at all cores within the institution. Once saved, the PO cannot be updated to include additional facilities. In the attachments field, you will need to upload documentation that can be used by the core or the institutional approver to verify the PO. This can be a formal document provided by your institution, or simply an email which confirms the purchase order number, expiration date, and amount.

Add New Purchase Order

Purchase Order Details | [Share with Other Group Members](#)

Core:
Flow Cytometry Facility
Flow Cytometry Facility
All cores at Help Site Documentation Institution

* Number

Name

* Initial Amount

* Expiration Date

* Attachments [Upload PO](#)

Cancel Save

5. Click the “Share with Other Group Members” tab, to indicate if this PO may be used by other members in your lab/group.

Purchase Order Details **Share with Other Group Members**

Group: Admin Lab (HCOM) ▾

Select All

Jackie Berge
 Carmel Denesik
 Mozelle Pollich
 Amira Becker
 Tressie Nicolas

Cancel Save

- Once you have completed both tabs, click on "Save" to proceed.
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Please enter the Standing PO.
You will have the opportunity to review the quote before being billed. ⓘ

Standing PO ⓘ

Please select ▾ [Add new PO](#)

Please select

123456 (Unapproved) information

- Once approved, you can return to the payment option and select it as a valid payment method.

Payment Method ⓘ 123456 (Approved) ▾ [Add new PO](#)

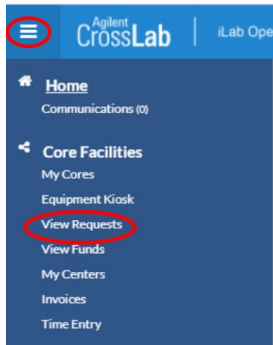
make default for project?

payment notes ⓘ

Attaching a new PO to a previously submitted request

- Login to iLab.

2. Select "View Requests" from the left panel menu. This will show your requests across all core facilities.



3. Click the green "dollar sign" icon next to the request you wish to update, then click the "Add new PO" link.

Displaying 2 out of 2 results. (Page 1 of 1)

date	for	service id	status	payment number	cost
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Charge Billing Status Standing PO Amount
Selected charge(s) total: \$0.00

Amount currently due: \$0.00

Update payment info for selected (2) charges

Standing POs 1 100.0 % Please select **Add new PO**

100.0% Total Allocated

Default to this payment method

payment notes

save cancel

4. Complete all fields on the "Purchase Order Details" tab. Please note you may select a specific core to use this PO, or you may choose "All cores at this institution." Once saved, the PO cannot be updated to include additional facilities. In the attachments field, you will need to upload documentation that can be used by the core or the institutional approver to verify the PO. This can be a formal document provided by your institution, or simply an email which confirms the purchase order number, expiration date, and amount.

Add New Purchase Order ✕

Purchase Order Details Share with Other Group Members

Core:

Flow Cytometry Facility

Flow Cytometry Facility

All cores at Help Site Documentation Institution

* Number

Name

* Initial Amount

* Expiration Date

* Attachments [Upload PO](#)

Cancel Save

- Click the “Share with Other Group Members” tab, to indicate if this PO may be used by other members in your lab/group.

Add New Purchase Order ✕

Purchase Order Details Share with Other Group Members

Group: Admin Lab (HCOM)

Select All

Jackie Berge

Carmel Denesik

Mozelie Pollich

Amira Becker

Tressie Nicolas

Cancel Save

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

Standing PO ?

Please select ▼ [Add new PO](#)

Please select

123456 (Unapproved) Information

8. Once approved, you can return to the payment option and select it as a valid payment method.

Payment Method ? 123456 (Approved) ▼ [Add new PO](#)

make default for project?

payment notes ?

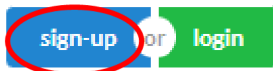
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[About Our Core](#) [Schedule Equipment](#) [Request Services](#) [View My Requests](#) [Contact Us](#)

3. Begin the process of creating your request. When you reach the “Payment Information” portion of the request, select the PO you wish to use from the “Standing PO” dropdown.

Payment Information

Please enter the Standing PO.

You will have the opportunity to review the quote before being billed. ⓘ

%

1 %

100.0%

Standing PO ⓘ

Please select Add new PO

Please select

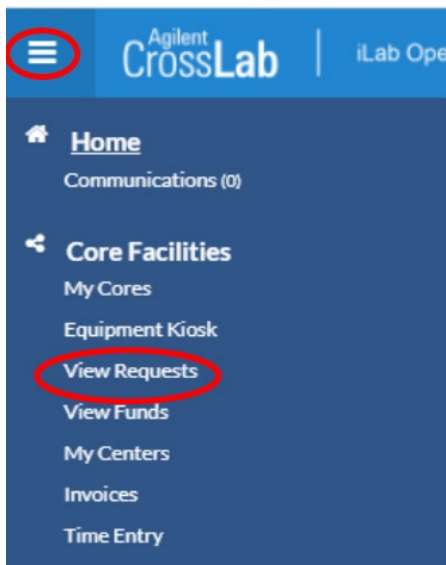
123456 (Approved)

Total Allocated ⓘ

4. Complete the process of submitting your request.

Attaching a standing PO to a previously submitted request.

1. Login to iLab.
2. Select “View Requests” from the left panel menu. This will show your requests across all core facilities.



3. Click the green “dollar sign” icon next to the request you wish to update, select the appropriate PO from the “Standing POs” dropdown, and click “save.”

The screenshot shows a list of requests on the left and a 'Payment Information' modal window on the right. The modal window has a table with columns: Charge, Billing Status, Standing PO, and Amount. Below the table, there is a section for 'Update payment info for selected (*) charges'. The 'Standing POs' dropdown is set to '100.0%' and the selected PO is '123456 (Approved)'. The 'save' button is circled in red.

Charge	Billing Status	Standing PO	Amount
Selected charge(s) total: \$0.00			
Only charges with a pending billing status are displayed			
Amount currently due: \$0.00			
Update payment info for selected (*) charges			
Standing POs	1	100.0%	1234567 (Approved)
			100.0%
			1234567 (Approved)
			23476 (Approved)
			1234567 (Approved)