Using Purchase Orders in iLab

For questions or concerns please contact iLab.Support@pennmedicine.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.

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.

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

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.

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

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

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.
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.
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.”

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

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.”
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.

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

1. Visit [https://med-upenn.corefacilities.org/landing/264](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.

4. Enter an optional approval note and click “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.

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.

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 Image]

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 Image]

5. Click the “Share with Other Group Members” tab, to indicate if this PO may be used by other members in your lab/group.
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 be routed to the core or an institutional administrator for approval.

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Attaching a new 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, then click the “Add new PO” link.

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.
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I am an external (non-Penn) PI or staff member who needs to attach an existing iLab PO to my request.

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Attaching a standing PO to a new request

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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.”