How to enter a purchase requisition (PR)

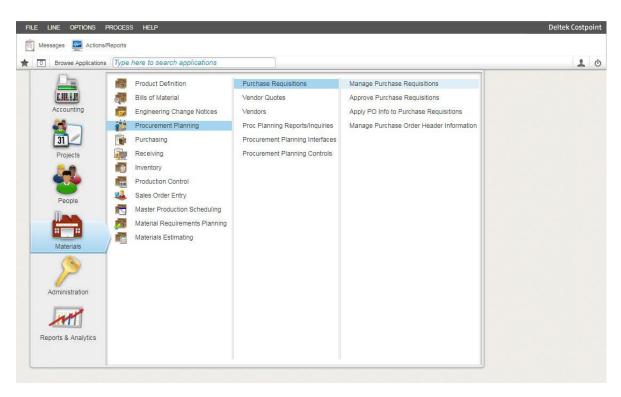
- 1. Open CostPoint via any internet browser. <u>Https://cpprod.pfenex.com</u>
- 2. Enter your username, computer login password, and DELTEKCP for the system.

Welcome	
Username (KLANEWOOD Password System (DETTEKCE)	Deltek Costpoint® 7
DELTEKCP 0	
Remember log in information	
Log In or Reset	©2009-2010 Deltek, Inc. Legal Statement

Important information needed prior to adding a Purchase Request:

- Account Number
- Project Number
- Organization
- Budget Number (if applicable)

3. Click on Materials > Procurement Planning > Purchase Requisitions > Manage Purchase Requisitions.



** Your screen may not look the same. Users may not all have the same access**

4. You can toggle between Table View (immediately below) and Form View (at the bottom of the page).

Identification Requisition ID		New	Copy 💗 Delete	of 1 New) 🥥 🕨 📄 Table) Query 💌 📄 🎑 🗙	
		Rev Approval Process	Status Pending	Submit for Approval Trans Currency USD	
	nting Defaults Other	r Information Notes Assign PO Default	ts Security Requirements		
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Subcontractor	r Agreement	Combine with Other Requisitions	Requisition Printed	Date Entered 08/07/2017 Buyer Assignment Date Procurement Type	
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Req	Line		Misc	Request	
Line*	Status Type	Item	Туре	Description Date*	

5. Form View example:

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Basic Information	Purchasing Information	Shipping & Receiving Oth	ner Information Notes	Security	Requirements		1	
Item		Rev	Misc Typ	e		Req U/M	1	
Description						Request	ed Date*	
Quantity	0	Ship ID MAIN		Taxable	-None- 🔻	Inventor	y Abbrev	
stimated Cost Amo	ints							
Cost Type	Unit C	ost	0.00			Extended Cost		0.00
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Step by Step Instructions

1. Enter the Approval Process.

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Requisitioner			Requisition Date * 08/07/2017	
Requisitioner*			Target Place Date	
Organization	Phone	Extension	Date Entered 08/07/2017	
Subcontractor Agreement	 Combine with Other Requisitions 	Requisition Printed	Buyer Assignment Date	
Buyer			Procurement Type	
Sales Tax/VAT Total	0.00 Req Total 0.00 Header SOW Hdr Text	Idr Approvals Totals Exchange R		8
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Line* Status Typ		Туре	Description Date	
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Line SOW Resources Seria	al/Lot Accounts Line Charges Line Text Line App	provals Currency Line Line Docur	ments Proj Sub Parts Link SCI/SAP Security Code	
			Delivery Schedul	e

2. To search through the **Approval Processes**. Click the Lookup tool, highlight the correct approval process, click **OK**.

e Applicat	tions	Materials > Procurement Planning	> Purchase Requisitions >	Mana	age Purc
			New Copy		Delete
		Rev O App	proval Process	٩	Status (
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	~	Approval Process Description	Approval Process		
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Requisition ID	Rev O Approval Process Status Pending Approval Trans Currency USD Other Information Notes Assign PO Defaults Security Requirements Vertice Vertice
Requisitioner 005 Oro 0050 Subcontractor 0053 Buyer 0057 0059 0059	Q Requisition Date * 08/07/2017 Phone Extension Target Place Date 08/07/2017 Combine with Other Requisitions Requisition Printed Date Entered 08/07/2017 Upper Assignment Date Procurement Type Opper Assignment Type
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Req Line * 1 Line Type Basic Information Purchasing Info	Header SOW Hdr Text Hdr Approvals Totals Exchange Rates Hdr Documents Link SCI/SAP Security Codes New Copy Delete I of 1 New Table Copy Copy Copy Copy Table Copy Co

3. Enter your **Requisitioner** number or employee ID.

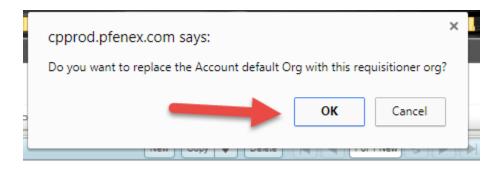
4. You can look up your employee ID by clicking on the Lookup icon at the edge of **Requisitioner** field, scroll down until you find your name, click to highlight your name, click OK.

	untir	g Defaults	Notes	Assign	PO Defaults	Secu	rity I	Requ
Requisitioner *	005	7 Qanew	ood, Kenne	th]		
Organization	U	se Query to Refine/Sort Your Search			Query 🔻			X
Subcontract	~	Employee Name	Preferre	d Name	Employee ID	City	St	
Buyer		Jin, Hongfan			0015			
20,0		Johnson, Maxine			0095			
		Kinley, Brian			0094			
		Knight, Sam			0114			
Sales Tax/VAT Tota		Lady, Patricia	Trish		0031			
		Lanewood, Kenneth	Ken		0057			
		Lasala, Robert C	Robert		0016	8888		
		Lee, Yinghui			0115			-
Req Line *		Liang, Bertrand	Bert		0002	888 S		
Basic Information		Lucy, Patrick	Pat		0019			
Basic Information	•	Maki, Steven	Steven		0020			
Line Notes		Malik-Chaudhry, Harbani			0074			
		Martinez, Mindy			0071			
		McAllister, Jim			0112			
		Means, Chris			0093			v
	4		1				►	
		Ok		Cancel				

5. *This should auto-populate*. Make sure you're in the correct **Organization** by selecting the Lookup tool, scroll down to your **Organization**, highlight the correct org, click OK.

Requisitioner*	0057	Lane	wood, Kenneth		
Organization	01.100.0001	Q Ph	none	Ext	ension
Subcontract	Use Query to Refine	Sort Your Search	h Query 🔻		Xisitio
	✓ Organization	Abbreviation	Name	Taxable	
	01.100.0013	1013	POQ Admin	1	
	01.100.0014	1014	Process Dev	1	
	01.100.0015	1015	Operations	1	
Sales Tax/VAT Tot:	01.100.0016	1016	Process Characterization	1	
Sales Tax/VAT Tota	01.200		Sales and Marketing	1	
	01.200.0001	2001	S&M External Alliances	1	Tota
	01.200.0002	2002	S&M Business Development	1	
Reg Line *	01.200.0003	2003	Marketing	1	
Basic Information	01.300		Admin	1	Sec
Basic Information	01.300.0001	3001	Accounting	1	
Line Notes	01.300.0002	3002	Corp (CEO/Office Mgr)	1	=
	01.300.0003	3003	Finance	1	
	01.300.0004	3004	Human Resources	1	
	01.300.0005	3005	IT	1	
	01.300.0006	3006	Benefits	1	-
- F	4			•	

6. If at any time you receive a message like this pop up at the top of your screen, click **OK**.



7. Enter your Phone number.

Not needed

8. Enter the **Target Place Date** this is important to let Purchasing know your true "*need by*" date.

Requisitioner				Requisitio	on Dat	*	1	08/07	7/20	17	i
Requisitioner*	0057	Lanewood, Kenneth		Target Pla	-	-		Uorur	120		100
Organization	01.300.0005	Phone (8583524402	Extension	Date E	ace Da				_		
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Sales Tax/VAT To	otal (0	Header SOW Hdr Text			13 20	14 15 21 22	5 16 2 23	17 24	18 25	12 19 26	d

- 9. Click on the **Accounting Defaults** Tab. Enter your **Project** number and **Account** number. If you need help finding your Project number or Account Number the Lookup tool and Query tool are helpful.
 - Project Acct Abbrev is helpful if you know the name of the account you are trying to use, it will autofill the project for you.

Browse Applications Materials > Procurement Planning > Purchase Requisitions > Manage Purchase Requisitions Identification Rev O Approval Process Status Pending Submit for Approval Trans Currency USD Header Accounting Defaults Other Information Notes Assign PO Defaults Security Requirements Project 8ADMIN.IT.001 T - General Proj Abbrev Organization 01.300.0005 T
New Copy Delete 1 of 1 New Table Query Identification Rev 0 Approval Process Status Header Accounting Defaults Other Information Notes Assign PO Defaults Project 8ADMIN.IT.001 IT - General Proj Abbrev Organization 01.300.0005 IT Org Abbrev
Identification Rev 0 Approval Process Status Fending Submit for Approval Trans Currency USD Header Accounting Defaults Other Information Notes Assign PO Defaults Security Requirements Project 8ADMIN.IT.001 IT - General Proj Abbrev Proj Abbrev Organization 01.300.0005 IT Org Abbrev 3005
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Account	-	Q				F
Organization	U	se Query to Refine/Sort Y	Your Search Query		X	
Inventory Abbrev	~	Account	Account Name	Account Type		
Ref No 1		630-330-000-001	Genl, Property, Crime Ins	N		
		630-330-000-002	D & O Insurance	N		
		630-330-000-003	Product Insurance	N	1	
		630-330-000-004	Auto Insurance	N		
		630-330-000-005	Umbrella Insurance	N	1	
		630-330-000-006	Cyber Crime Insurance	N		
		630-330-000-007	EPL Insurance	N	=	
		630-340-001-001	Office Supplies	N		F
Req Line *		630-340-001-002	Computer Supplies	N		
Basic Informatio		630-340-002-001	PP&E less than \$1,000	N		
		630-340-003-001	Office Equipment Lease	N		Г
Item (630-350-000-001	Local/LD Telephone	N		
Description (630-350-000-002	Cell Phone	N	1	
Quantity (630-350-000-003	Internet Expense	N		Ŀ
Estimated Cost A		630-350-000-004	Conference Calls	N		
Cost Type		630-360-000-001	Employee Training	N	-	

10. Click on the **Other Information** tab. For goods you <u>must</u> enter a **Requested Date** and **Deliver To** (person to receive product or service at Pfenex). If you need your order's shipping (i.e. 2-day air, overnight, etc.) please specify in **Ship Via**.

dentification Requisition ID Rev Header Accounting Defaults Other Information		Submit for Trans Currency USD
Pelivery Defaults Requested Date Ship ID MAIN Ship Via	PO Defaults Preferred Vendor Sugg Blanket PO PO	Tax Status Use Item Type Default ▼ Over Budget Validation No Export -None-
Deliver To	Discount 0.00%	GSA 🗹 Auto-default Header Text

11. Choose your **Preferred Vendor**

leader Acco	unting Defaults Other Information	Notes Assign PO Defaults Security Requirements PO Defaults	
Requested Date Ship ID Ship Via Deliver To	08/10/2017 Drop Ship MAIN Kenneth Lanewood	Preferred Vendor CDW00000 Q Addr ORD Sugg Blanket PO PO Discount 0.00%	Tax Status Use Item Type Default Over Budget Validation No Export -None- GSA Auto-default Header Text

12. Use the Notes tab for any relevant order information you want to include on the PO or for Purchasing to be aware of.

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Requisition ID Rev O Appro	oval Process	Status Pending	Submit for Approval Trans Currence	y USD
Header Accounting Defaults Other Information Notes A	Assign PO Defaults Secι	rity Requirements		
Please specify Lot <u>D416857</u>				
He	ader SOW Hdr Text Hdr A	pprovals Totals Exchange Rates	Hdr Documents Link SCI/SA	P Security Codes

13. The top section has been completed, now we move to the bottom section where we will enter the goods and or services.

				New Copy	Delete ┥	1 of 1 New	s 🕨 📕	Table Q	Jery 🔻	
Identification Requisition ID	Re	ev O A	Approval Proce	ess (IT	Status Pendir	ng E	Submit for Approval	Trans C	urrency	USD
Header Accounting Defau	Its Other Infor	mation Notes	Assign Pi	O Defaults Sec	urity Requirements					
Delivery Defaults		POI	Defaults				2			
Requested Date 08/10/2017	Dro	op Ship Pre	ferred Vendor	CDW00000	Addr ORD		Tax Status	Use Iten	n Type Def	ault 🔻
Ship ID MAIN		Suc	g Blanket PO		1		Over Budget	Validation	No	V
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Deliver To Kenneth La	newood	Dise	count	0.00%			GSA 🖉	Auto-de	efault Head	der Text
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Pasic Information Purcha Item Description Quantity	sing Information	Shipping & Re	g v eceiving Ot ev	Net Resource I ther Information	Copy Deleter	r Requirements	1 of 1 New S	U/M ested Date	*	Query
Pasic Information Purcha	sing Information	Shipping & Re	g v eceiving Ot ev	Net Resource I ther Information	Copy Deleter	r Requirements	1 of 1 New S	J/M ested Date	*	Curity Co

- 14. Enter your first line **Item**. Instead of the Lookup tool, you can start typing in the field and it will help narrow it down for you.
 - Start with G- for goods or S- for services

→	New Copy 🔻 Delete 🚺 🛋 1 of 1 New	S D Table Query V
Req Line *	1 Line Type M Status Pending 💌 🗌 Resource Exists	
Basic Informat	on Purchasing Information Shipping & Receiving Other Information Notes Security Requirements	
Item	G-COMPU Q Rev Misc Type	Req U/M
Description	G-COMPUTER HARDWARE	Requested Date *
Quantity	G-COMPUTER SOFTWARE Ship ID MAIN Taxable -None-	Inventory Abbrev
Estimated Cost	Amounts	
Cost Type	Unit Cost 0.00 Exten	ded Cost 0.00
Line Charges	0.00 Sales Tax/VAT Rate Sales Tax/VAT 0.00 Total	Cost 0.00
Line SO	W Resources Serial/Lot Accounts Line Charges Line Text Line Approvals Currency Line Line Documents Proj	Sub Parts Link SCI/SAP Security Codes Delivery Schedule

15. Enter the **Description** of the item or service. Please try to match the vendors line item as best as possible.

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Req Line * 1 Line Type G	Status Pending 🔻 🗌 Reso	urce Exists	
Basic Information Purchasing Inform	nation Shipping & Receiving Other Informat	on Notes Security Requirements	
Item G-COMPUTER HARDV	VARE Rev	Misc Type	Req U/M EA
Description ENTER DETAILED GO	ODS INFORMATION	٩	Requested Date *
Quantity 0	Ship ID MAIN	Taxable Yes 💌	Inventory Abbrev
Estimated Cost Amounts			
Cost Type	Unit Cost 0.00		Extended Cost 0.00
Line Charges 0.00	Sales Tax/VAT Rate 7.7500% Sales Tax/VAT Rate	ales Tax/VAT 0.00	Total Cost 0.00
Line SOW Resources Serial/L	ot Accounts Line Charges Line Text Line Ag	provals Currency Line Line Documents	Proj Sub Parts Link SCI/SAP Security Codes Delivery Schedule

16. Enter the **Quantity** and **Unit Cost** and update **Req U/M** if needed.

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Req Line*	1 Line Type G Status Pending V Resource Exists
Basic Informat	tion Purchasing Information Shipping & Receiving Other Information Notes Security Requirements
Item	G-COMPUTER HARDWARE Rev Misc Type EA
Description	Lenovo Laptop Requested Date*
Quantity	Ship ID MAIN Taxable Yes V Inventory Abbrev
Estimated Cost Cost Type	Amounts Unit Cost 0.00 Extended Cost 0.00
Line Charges	0.00 Sales Tax/VAT Rate 7.7500% Sales Tax/VAT 0.00 Total Cost 0.00
Line	SOW Resources Serial/Lot Accounts Line Charges Line Text Line Approvals Currency Line Line Documents Proj Sub Parts Link SCI/SAP Security Codes Delivery Schedule

- If you are entering a "Service" for the Item:
 - The *Quantity* should be the total value of the service.
 - The *Unit Cost* should be entered as one (1).

17. Enter a **Requested Date**.

)
		•	Augus	t 🔻	2017	€ ►
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Req Line *	1 Line Type G Status Pending V Resource Exists	27	28 :	29 30	31	
Basic Informat	tion Purchasing Information Shipping & Receiving Other Information Notes Security Requirements					
Item	G-COMPUTER HARDWARE Rev Misc Type					Today
Description	Lenovo Laptop	eques	ted D	ate		
Quantity	2 Ship ID MAIN Taxable Yes V In	vento	ry Abb	orev (
Estimated Cost	Amounts					- 1
-	Unit Cost 1,557.95 Extended	d Cost				3,115.90
Cost Type	0.00 Sales Tax/VAT Rate 7.7500% Sales Tax/VAT 241.48 Total Cos	st				3,357.38
Cost Type Line Charges						

18. Click on the **Purchasing** tab. Choose Preferred Vendor from drop-down and add the Vendor Part to the field.

eq Lui		Status Pending	Resource			
asic Informatic	n Purchasing Information	Shipping & Receiving	Other Information	Notes Secu	rity Requirements	
uyer	BUYER5	Assignment Date		Delivery Schedu	le Exists	
ternate Part Nu	mbers				Target Place Date	05/18/2019
referred Vendo	CDW00000 Q	DW			Preferred Quote	
endor Part	TIB0541	Rev			Suggested Blanket PC	
lanufacturer					Procurement Type	
anufacturer Pa	art	Rev				

19. Click on the **Notes** tab. Under **Internal Notes** enter the budget and contract tracking numbers. Note: Line notes will show up on the PO.

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							Delivery Schedule

20. You will need to click on **New** for each line you wish to add to the PR. You can also clone and delete lines from this tool bar.

2	Header SOW	Hdr Text	Hdr Approvals	<u>Totals</u>	Exchange Rates	Hdr Documents	Link SCI/SAP	Security Codes
→			New Copy	▼ De	lete	of 1 New	Table	Query 💌 🔲
Req Line * 1 Line Type G Status Pendin	g 🔻	Res	source Exists					

21. Once you are ready to submit your PR for approval, check the box **Submit for Approval** then click save.

	FILE LINE C	PTIONS PROCESS HELP	Deltek Costpoint
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Requisitioner Requisition Date 08/07/2017 Requisitioner 0057 Lanewood, Kenneth Target Place Date 08/07/2017 Organization 01.300.0005 Phone 8533524402 Extension Date Entered 08/07/2017 Subcontractor Agreement Image: Combine with Other Requisitions Requisition Printed Buyer Assignment Date 08/07/2017 Buyer BUYER5 Deever, Drew Procurement Type Procurement Type Sales Tax/VAT Total 241.48 Req Total 3.357.38 Header SOW Hor Approvals Totals Exchange Rates Hdr Documents Link SCI/SAP Security Codes Req Line * 1 Line Type Status Pending Rescurity Requirements Basic Information Purchasing Information Shipping & Rescuring Nier: Type Req U/M EA Description Lenovo Laptop Nier: Type Req U/M EA Requested Date* 08/02017 Cost Type Unit Cost 1.557.93 Extended Cost 3.115.90 Line Charges 0.00 Sales Tax/VAT Rate 7.7500% Sales Tax/VAT 241.48		Rev O Approval Process IT Status Pending Submit for Approval Trans Currency USD	
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Cliff Notes

Here is a markup of all the fields and tabs you must modify to be successful at submitting a purchase requisition. Note: The last step is to check the box **Submit for Approval** before clicking Save.

Main page:

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