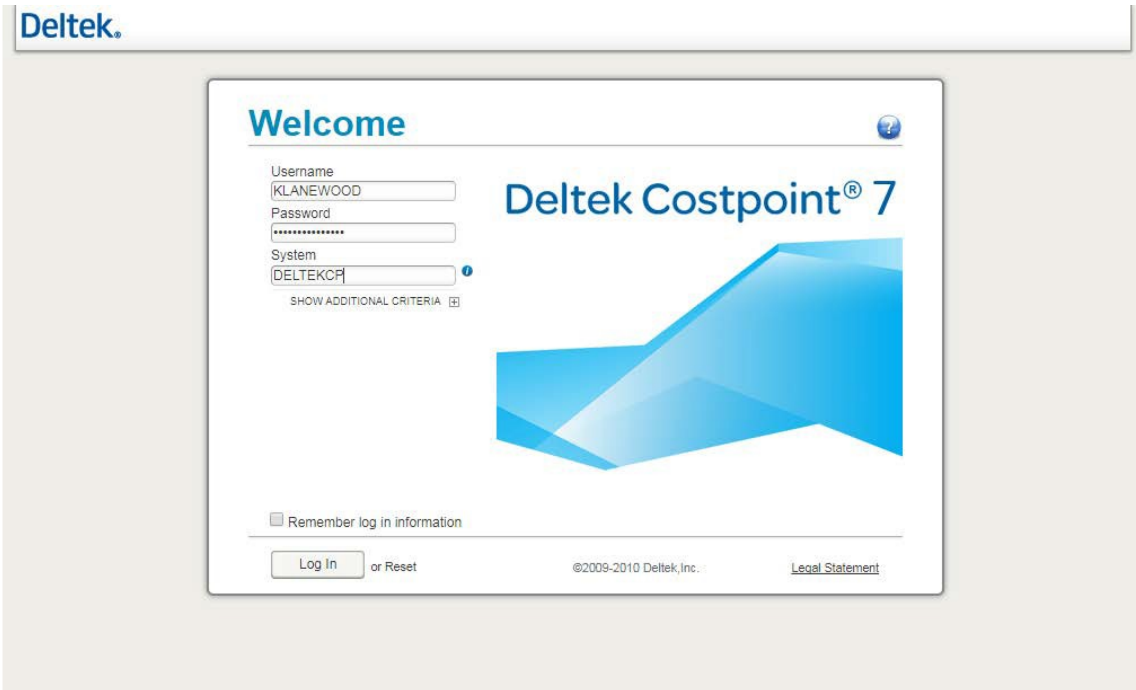
How to enter a purchase requisition (PR)

1. Open CostPoint via any internet browser. Https://cpprod.pfenex.com

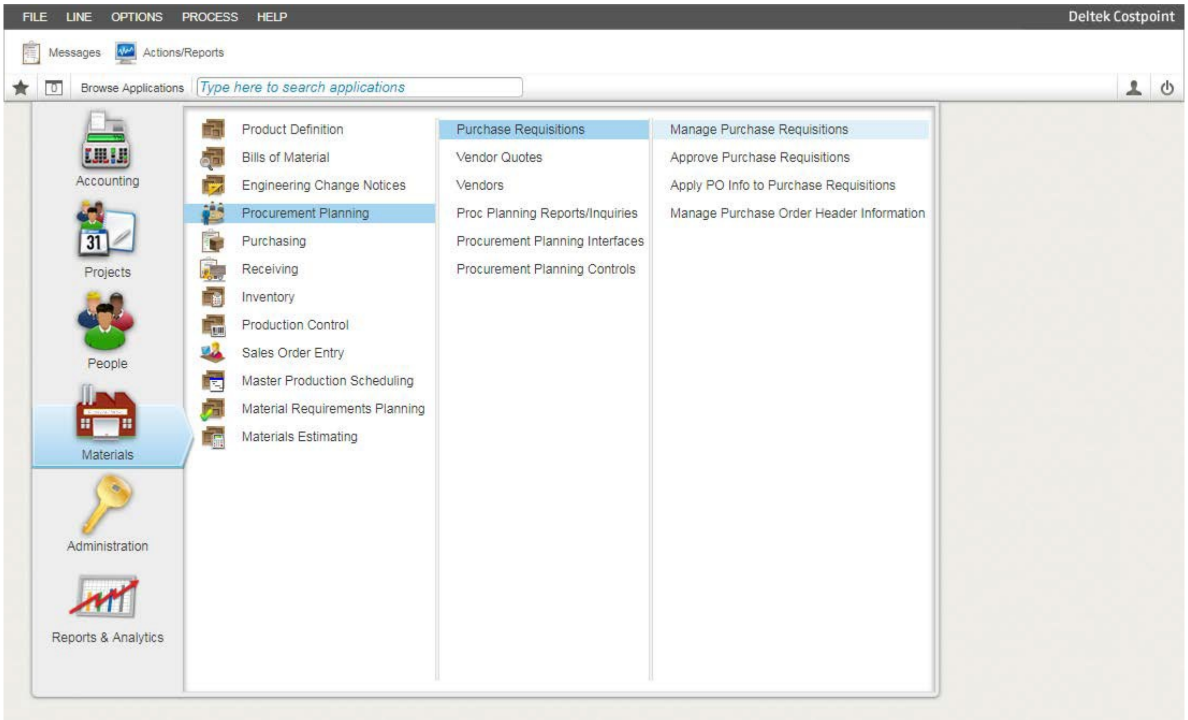
2. Enter your username, computer login password, and DELTEKCP for the system.



Important information needed prior to adding a Purchase Request:

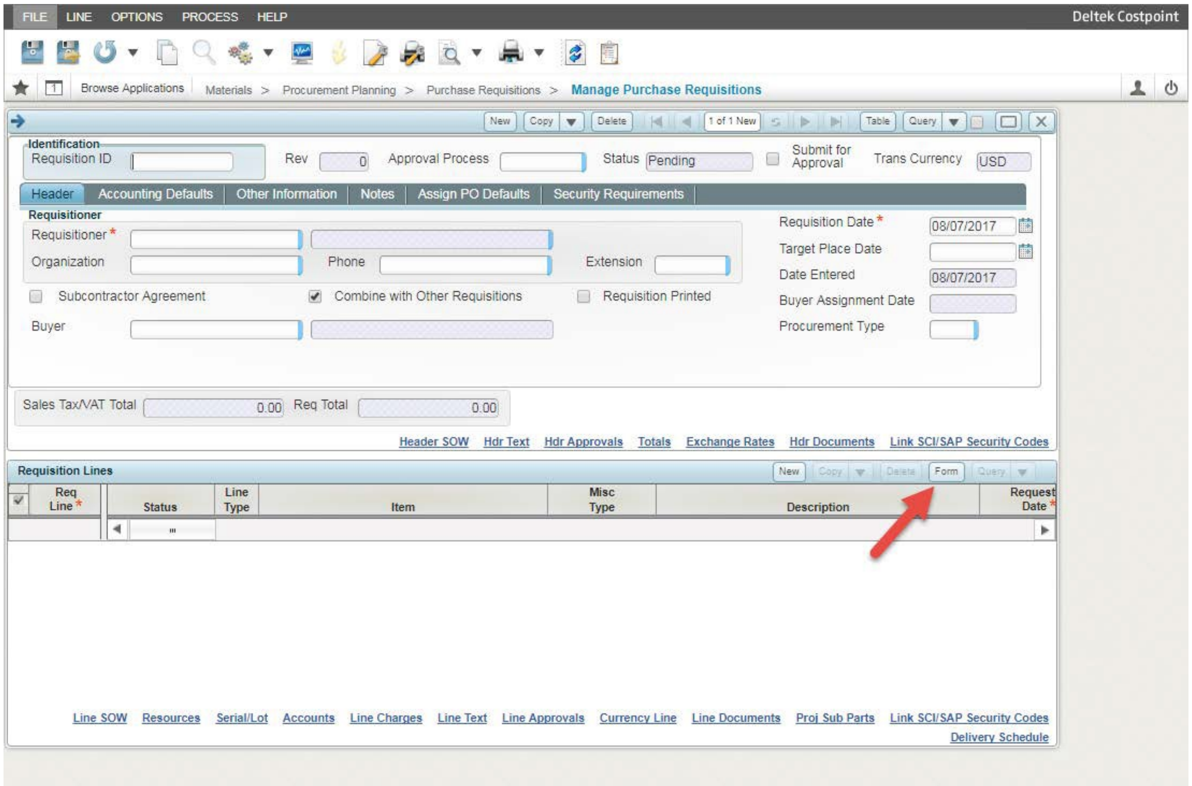
- Account Number
- Project Number
- Organization
- Budget Number (if applicable)

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

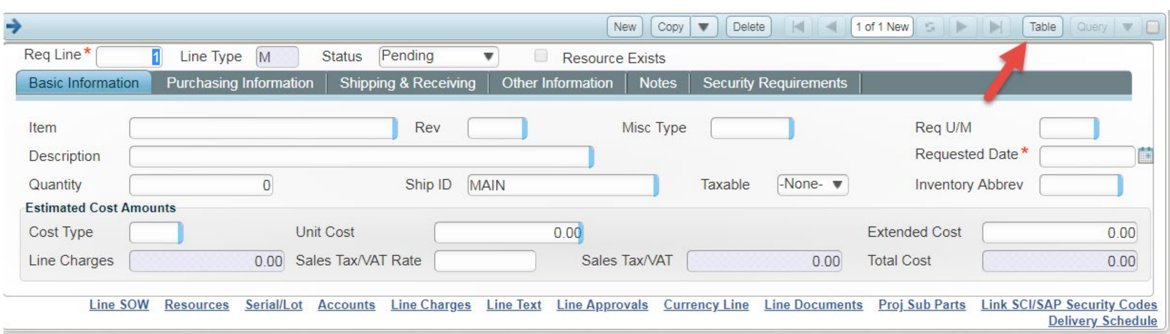


** Your screen may not look the same. Users may not all have the same access**

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

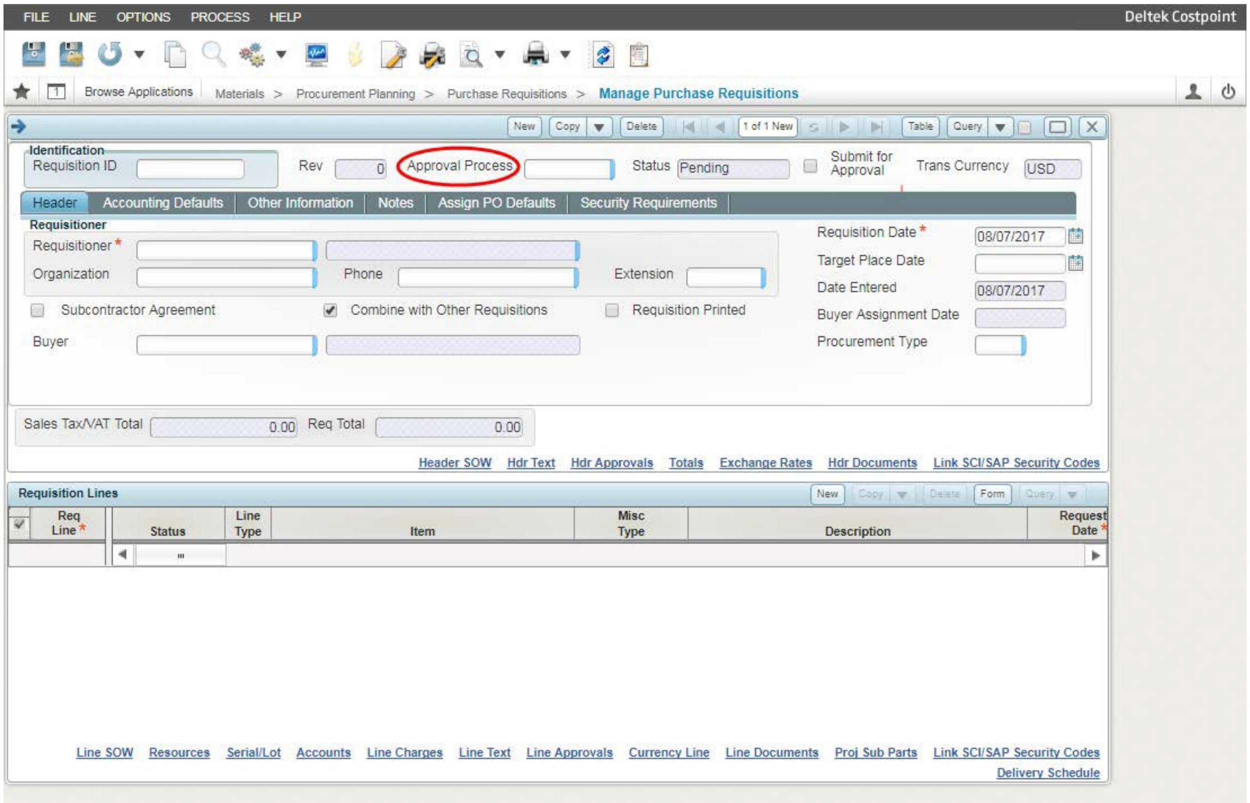


5. Form View example:

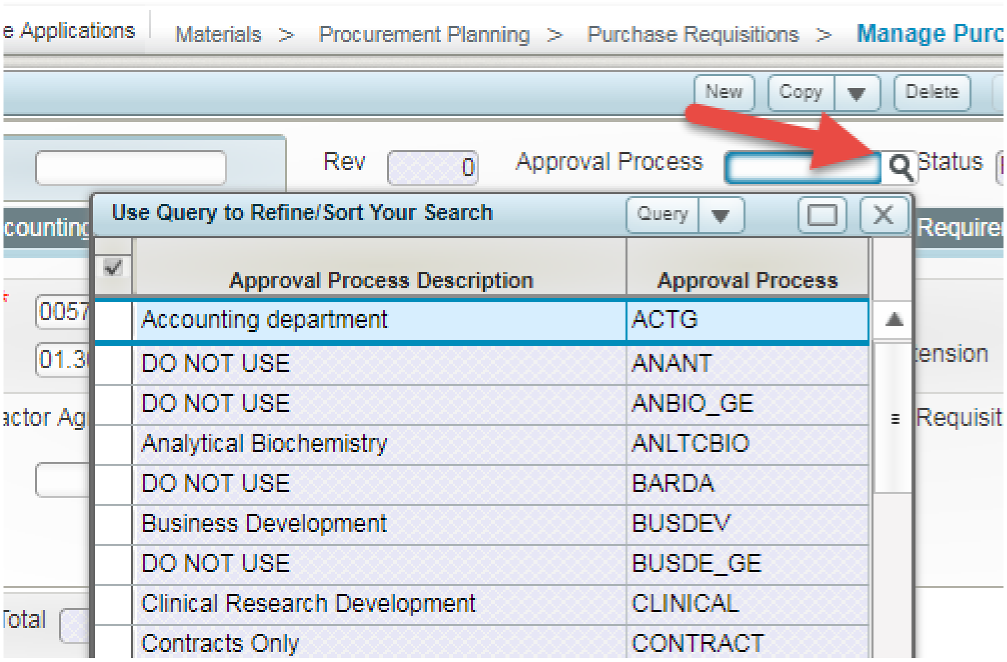


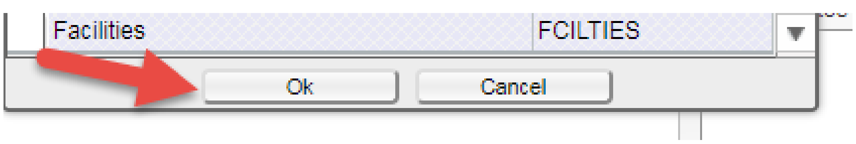
Step by Step Instructions

1. Enter the Approval Process.

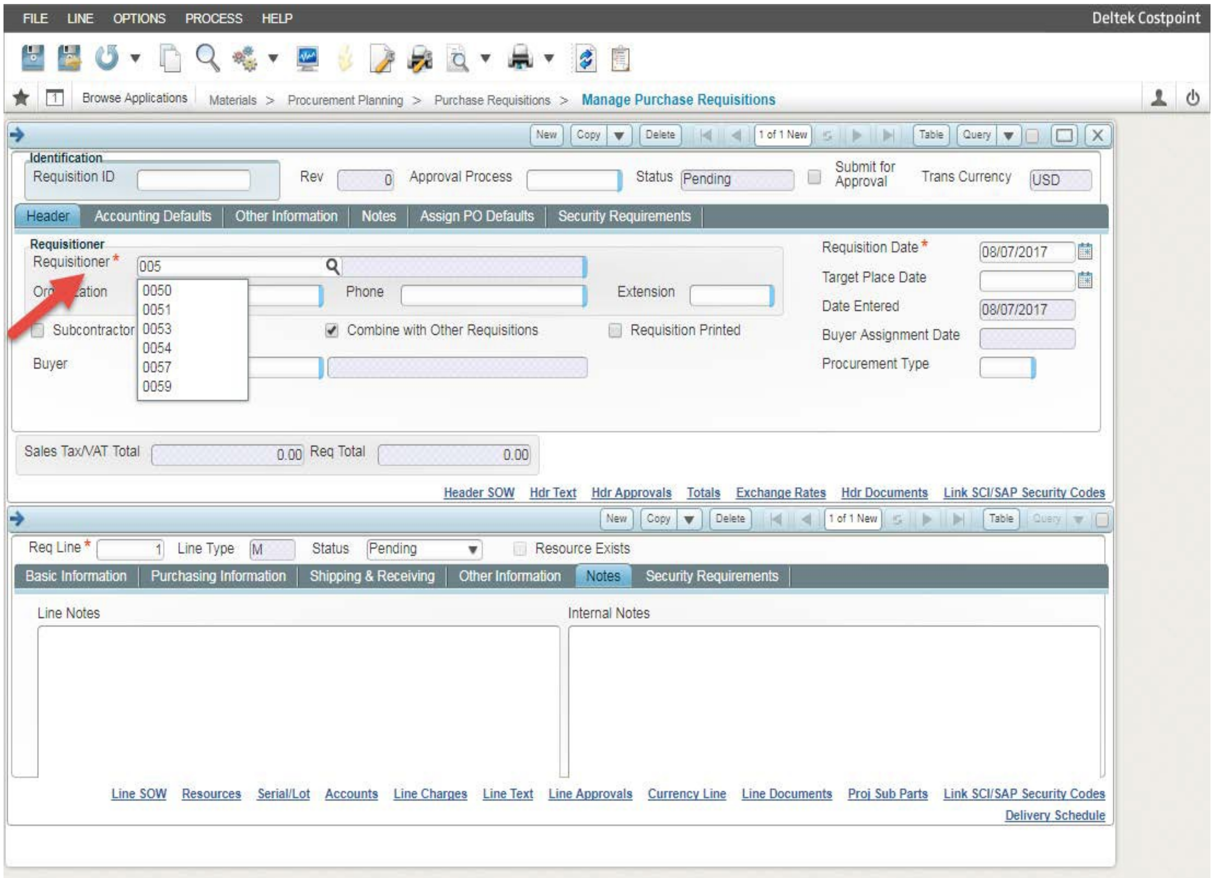


2. To search through the **Approval Processes**. Click the Lookup tool, highlight the correct approval process, click **OK**.

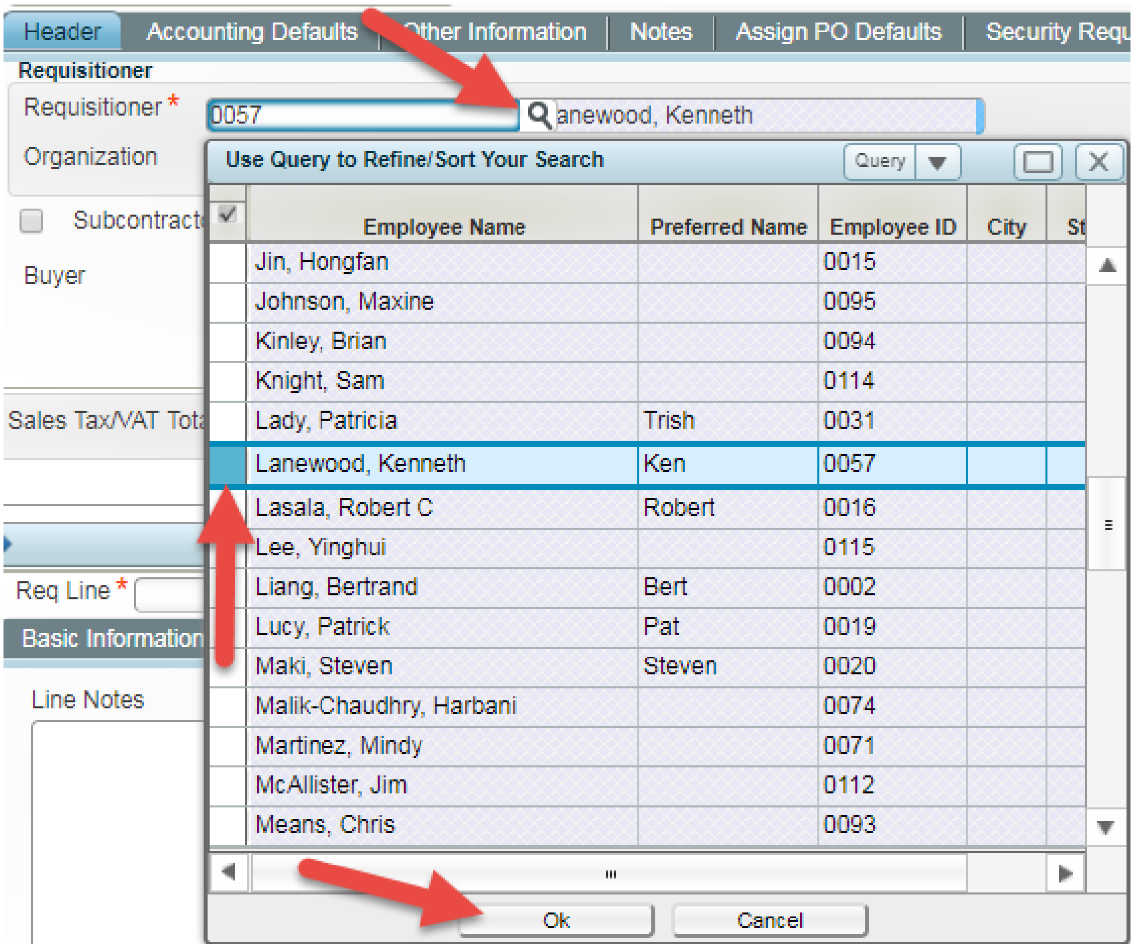




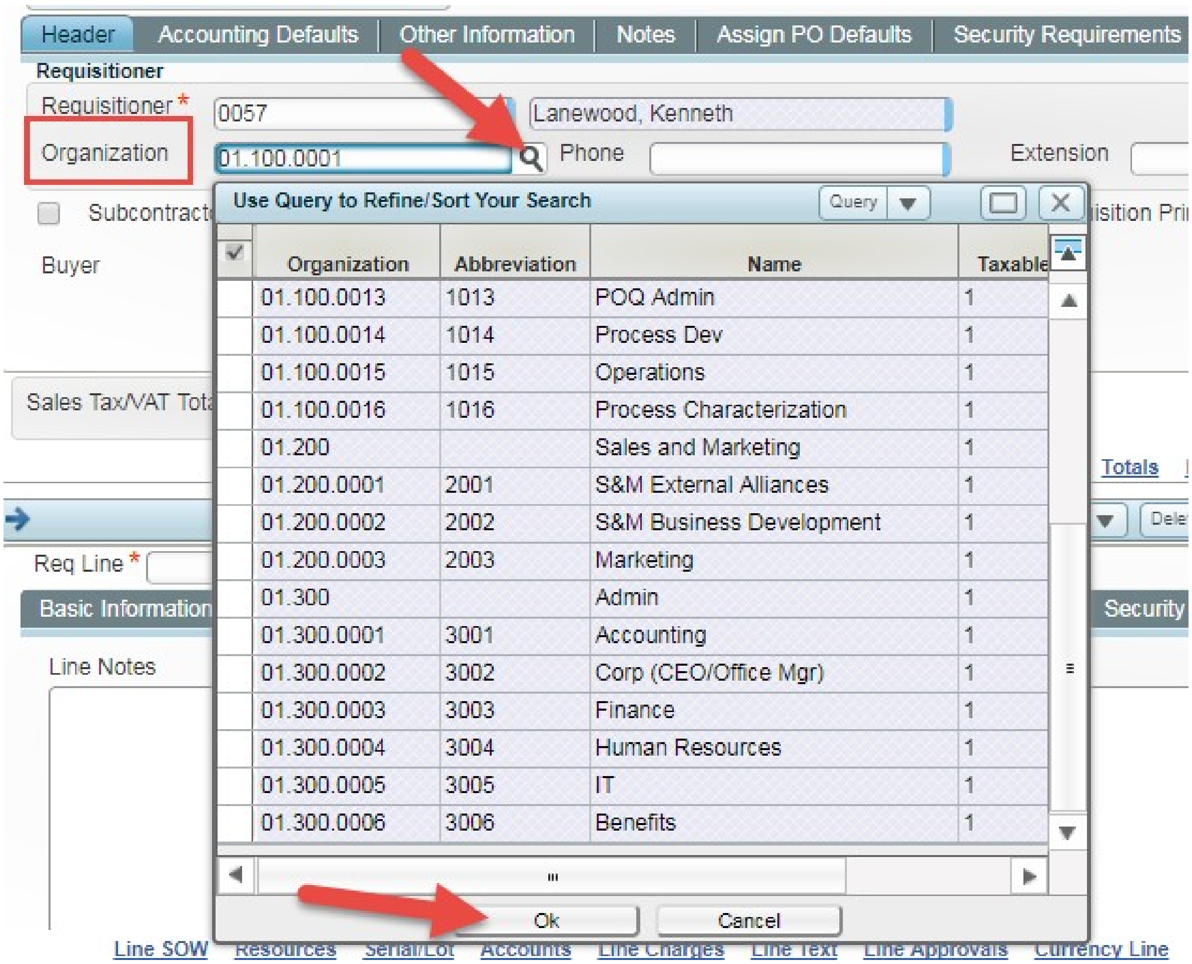
3. Enter your **Requisitioner** number or employee ID.



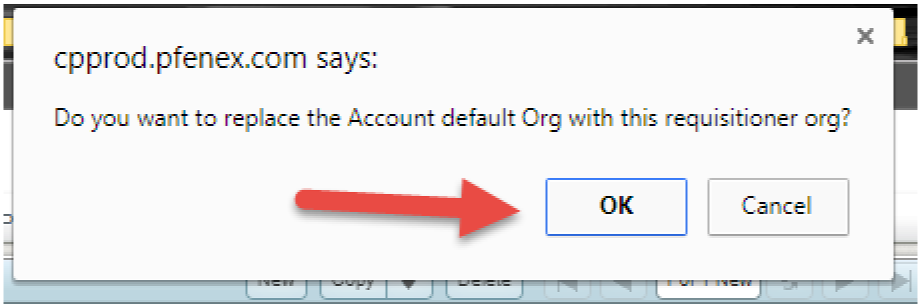
4. You can look up your employee ID by clicking on the Lookup icon at the edge of **Requisitioner** field, scroll down until you find your name, click to highlight your name, click OK.



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.

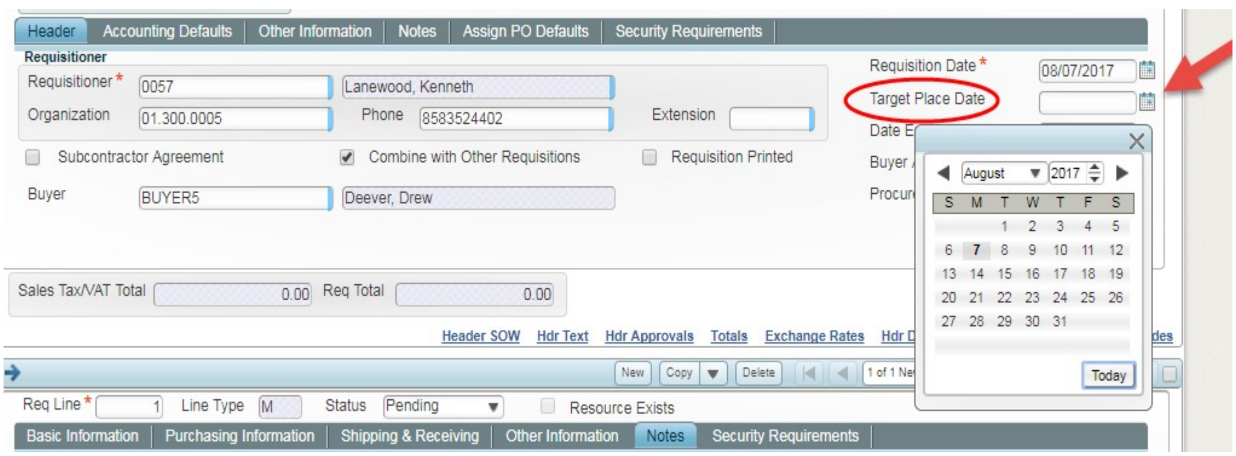


6. If at any time you receive a message like this pop up at the top of your screen, click **OK**.

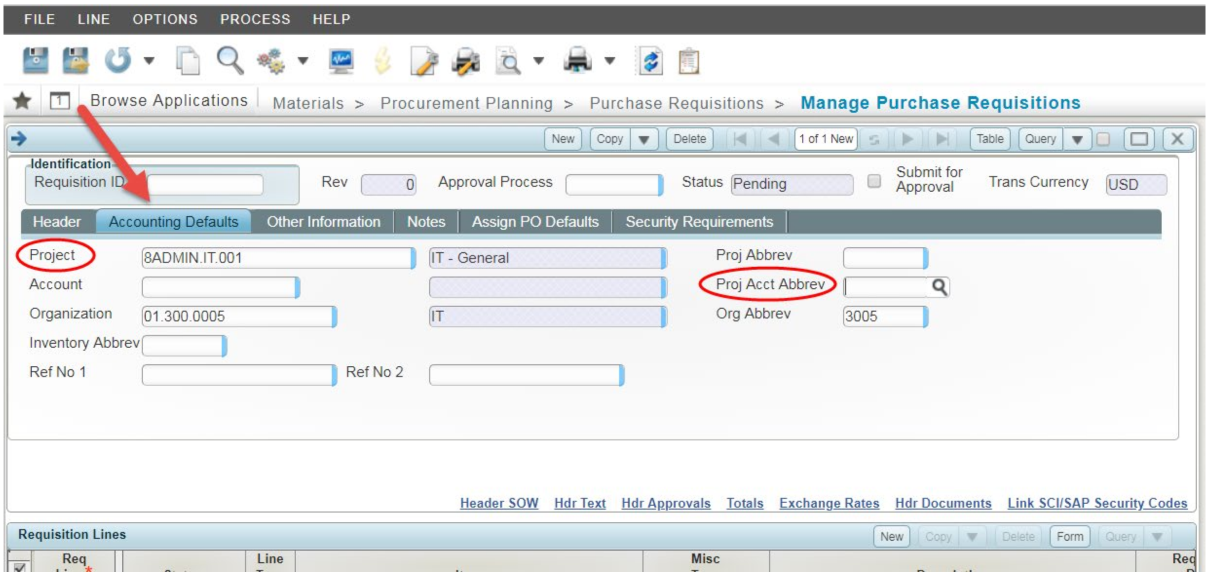


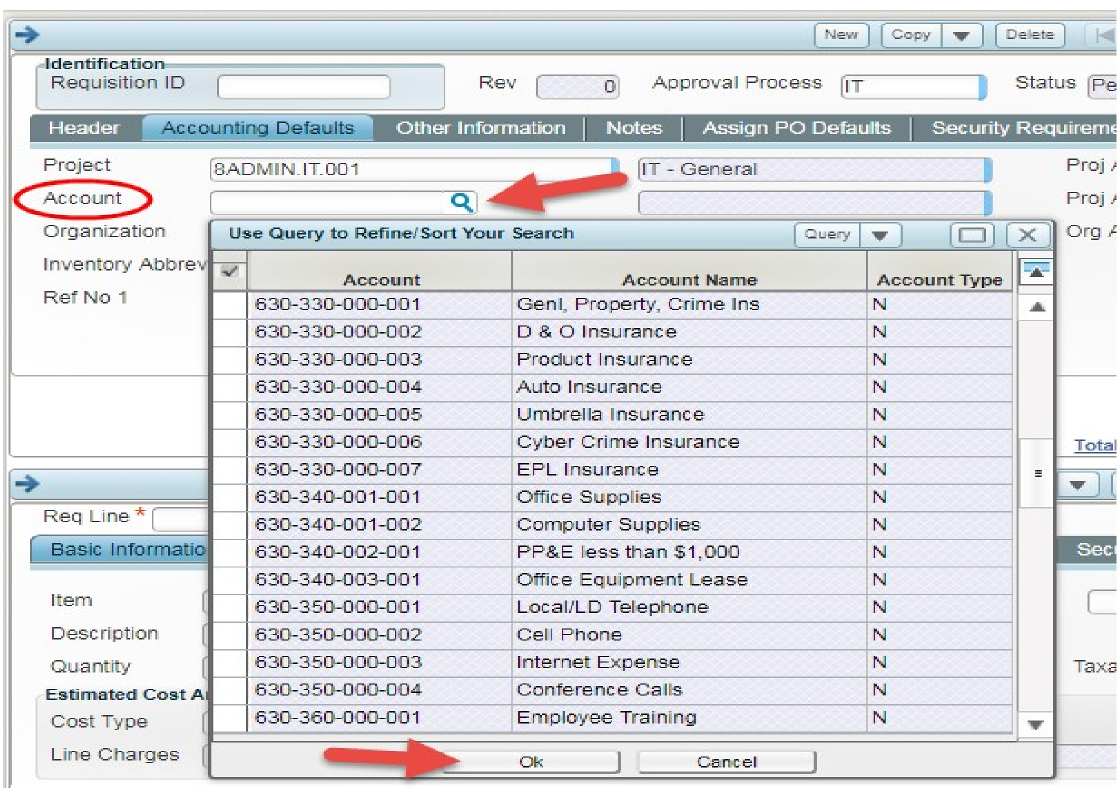
7. Enter your Phone number. **Not needed**

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

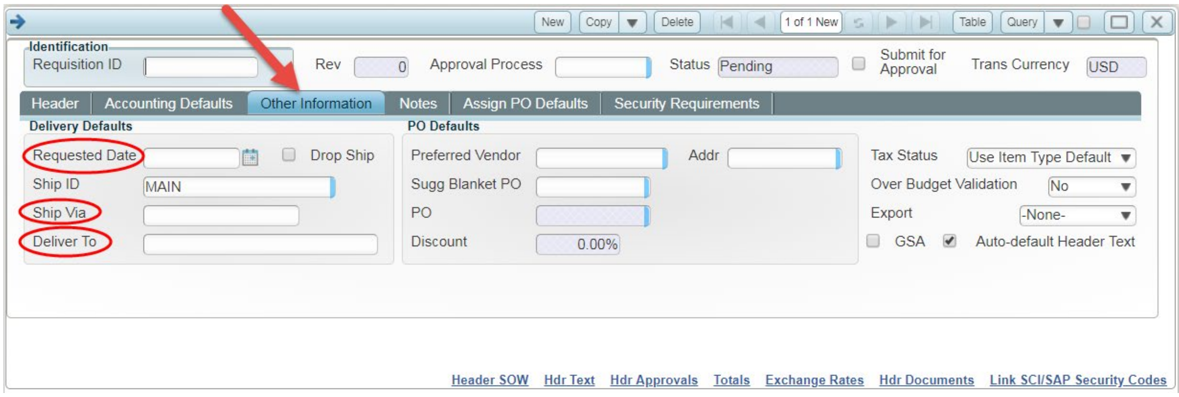


9. Click on the **Accounting Defaults** Tab. Enter your **Project** number and **Account** number. If you need help finding your Project number or Account Number the Lookup tool and Query tool are helpful.
    - Project Acct Abbrev is helpful if you know the name of the account you are trying to use,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

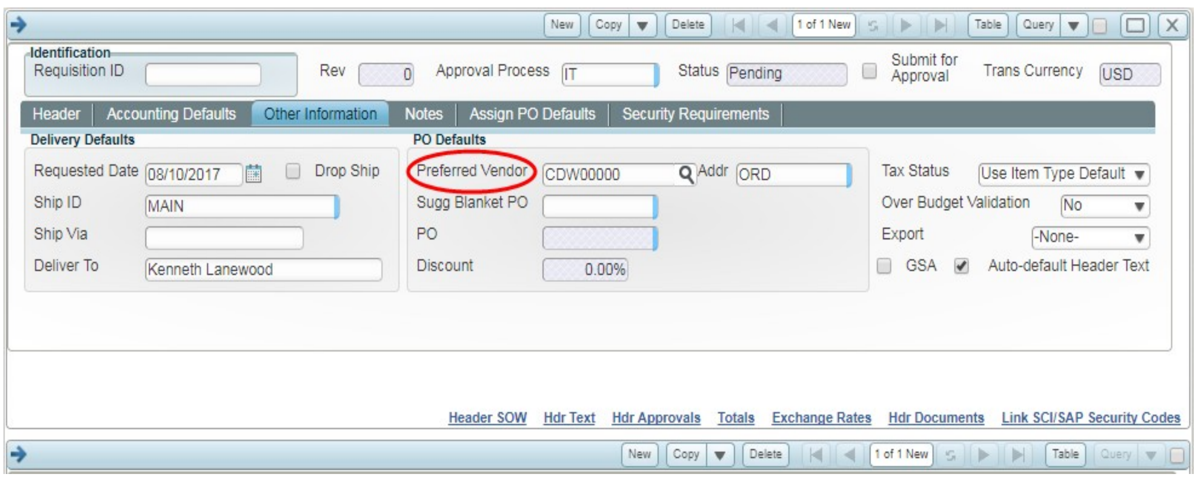




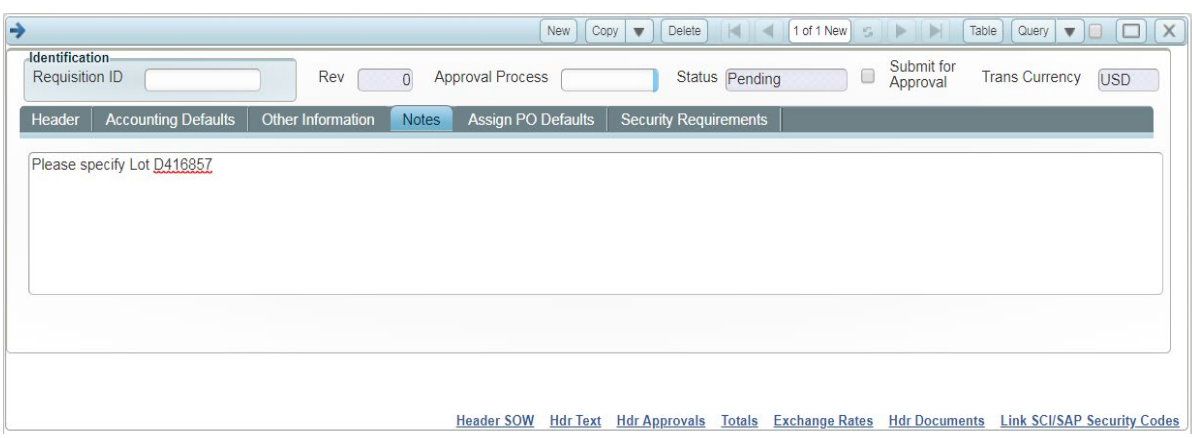
10. Click on the **Other Information** tab. For goods you *must* enter a **Requested Date** and **Deliver To** (person to receive product or service at Pfenex). If you need your order's shipping (i.e. 2-day air, overnight, etc.) please specify in **Ship Via.**



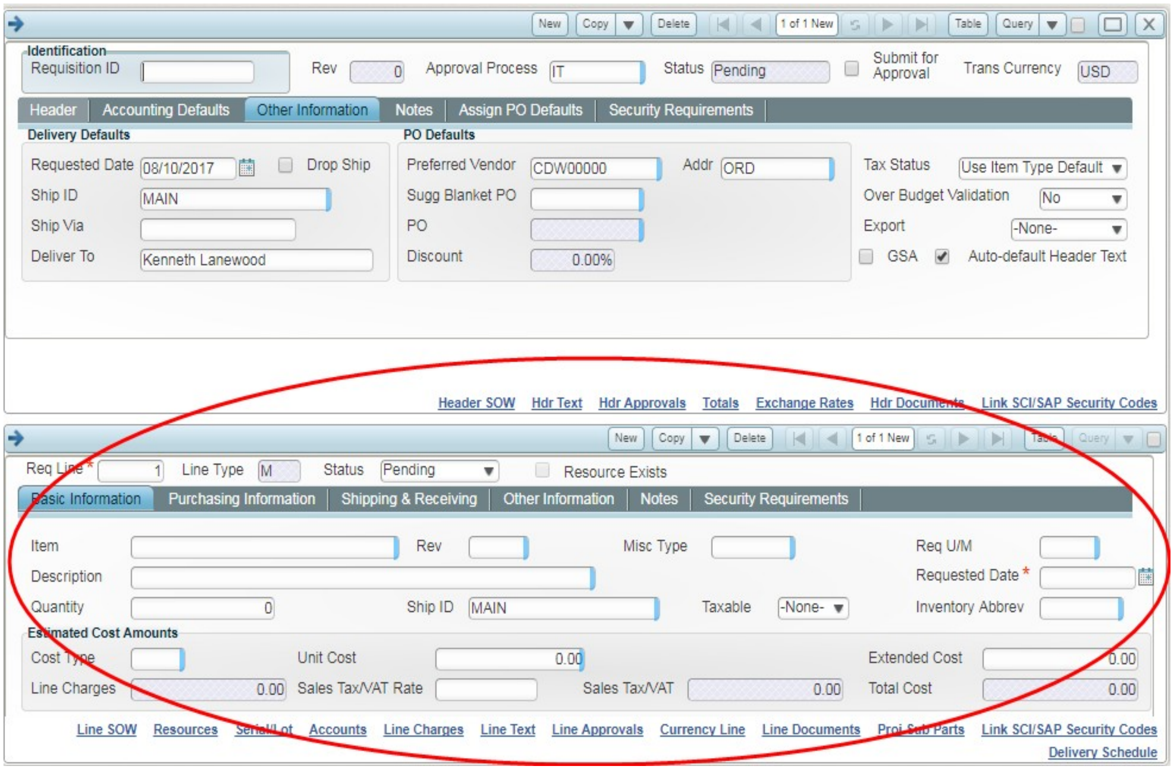
11. Choose your **Preferred Vendor**



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

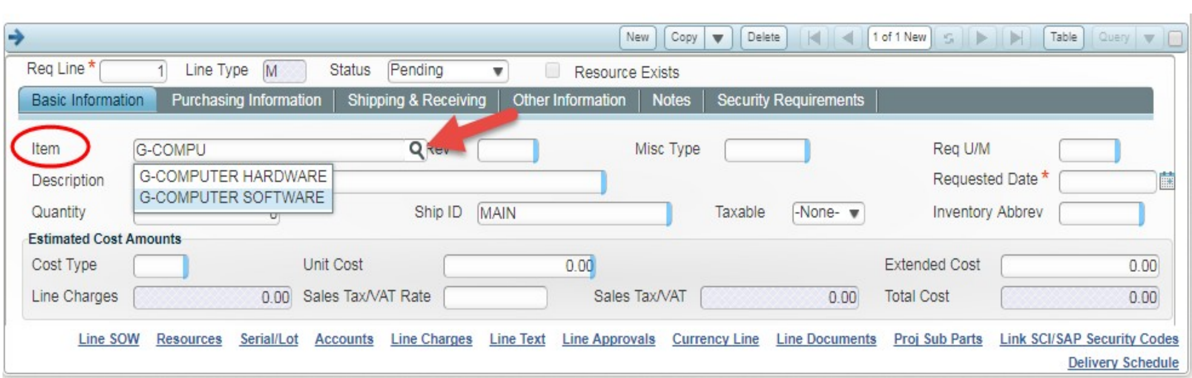


13. The top section has been completed, now we move to the bottom section where we will enter the goods and or services.

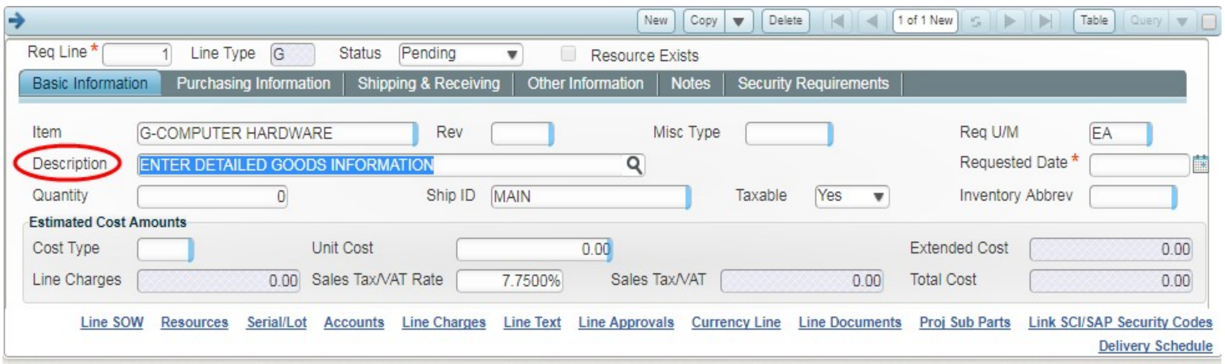


14. Enter your first line **Item**. Instead of the Lookup tool, you can start typing in the field and it will help narrow it down for you.

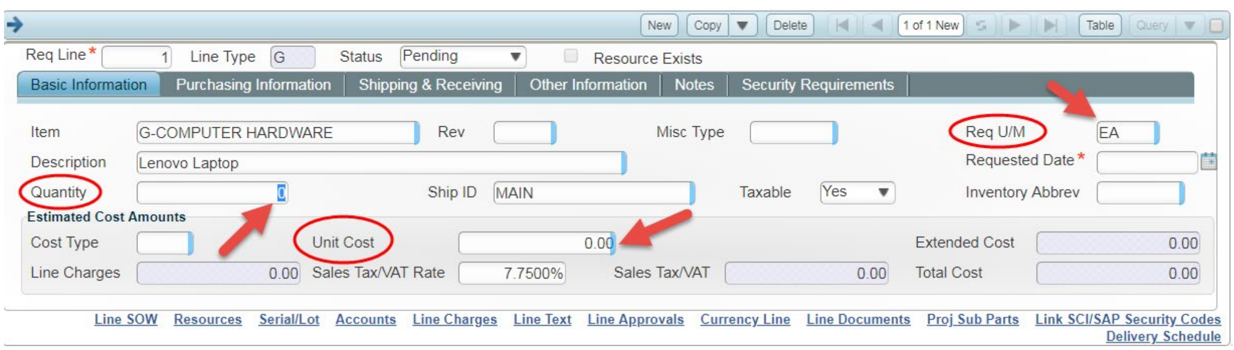
    - Start with **G-** for goods or **S-** for services



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

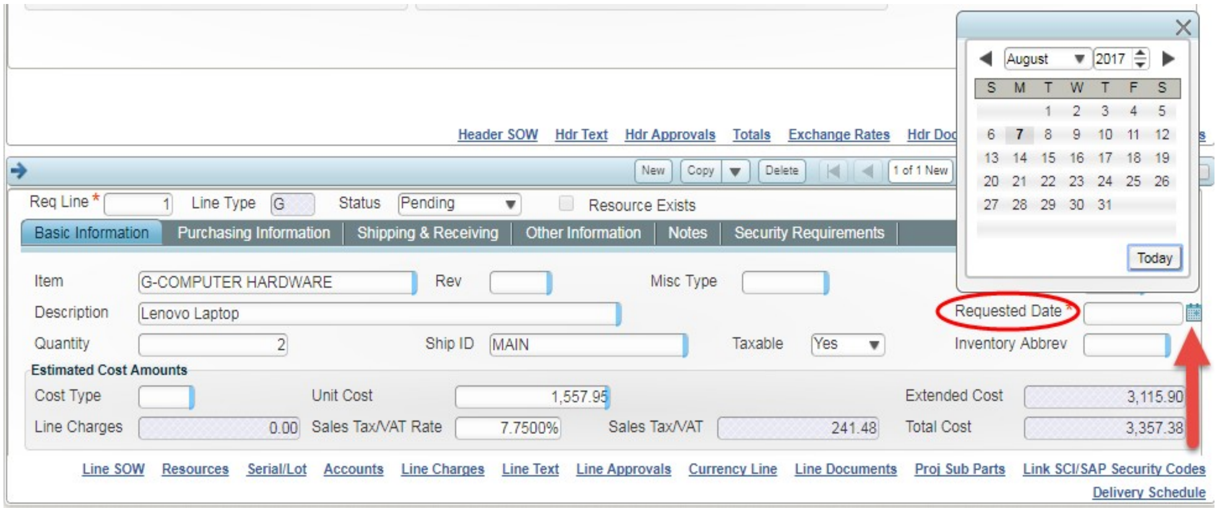


16. Enter the **Quantity** and **Unit Cost** and update **Req U/M** if needed.

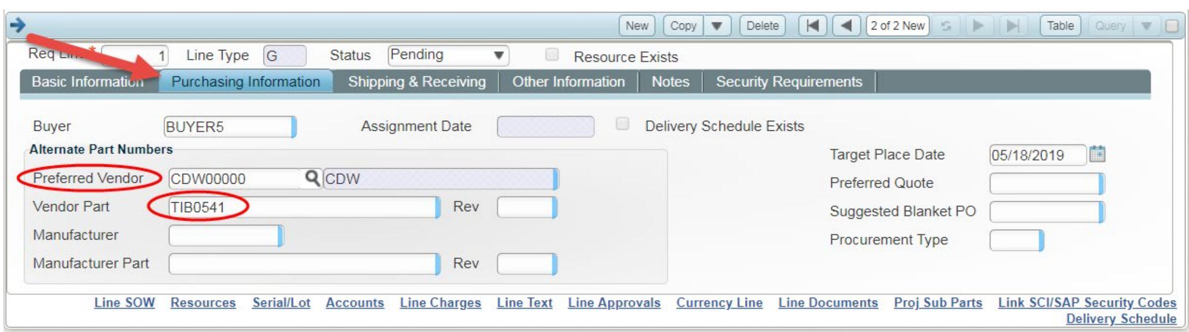


- If you are entering a **"Service"** for the Item:
  - The ***Quantity*** should be the total value of the service.
  - The ***Unit Cost*** should be entered as one (1).

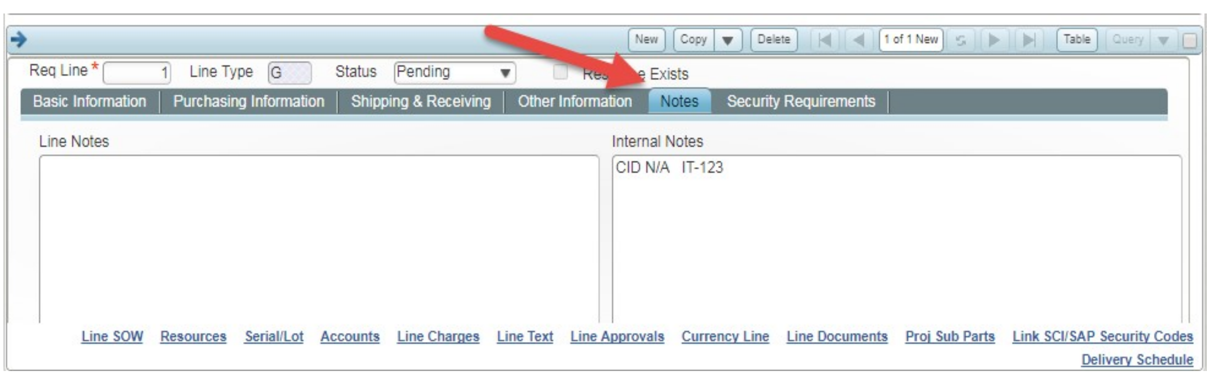
17. Enter a **Requested Date**.



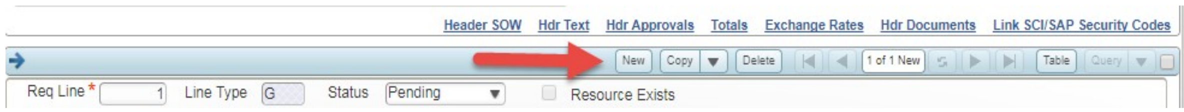
18. Click on the **Purchasing** tab. Choose Preferred Vendor from drop-down and add the Vendor Part to the field.



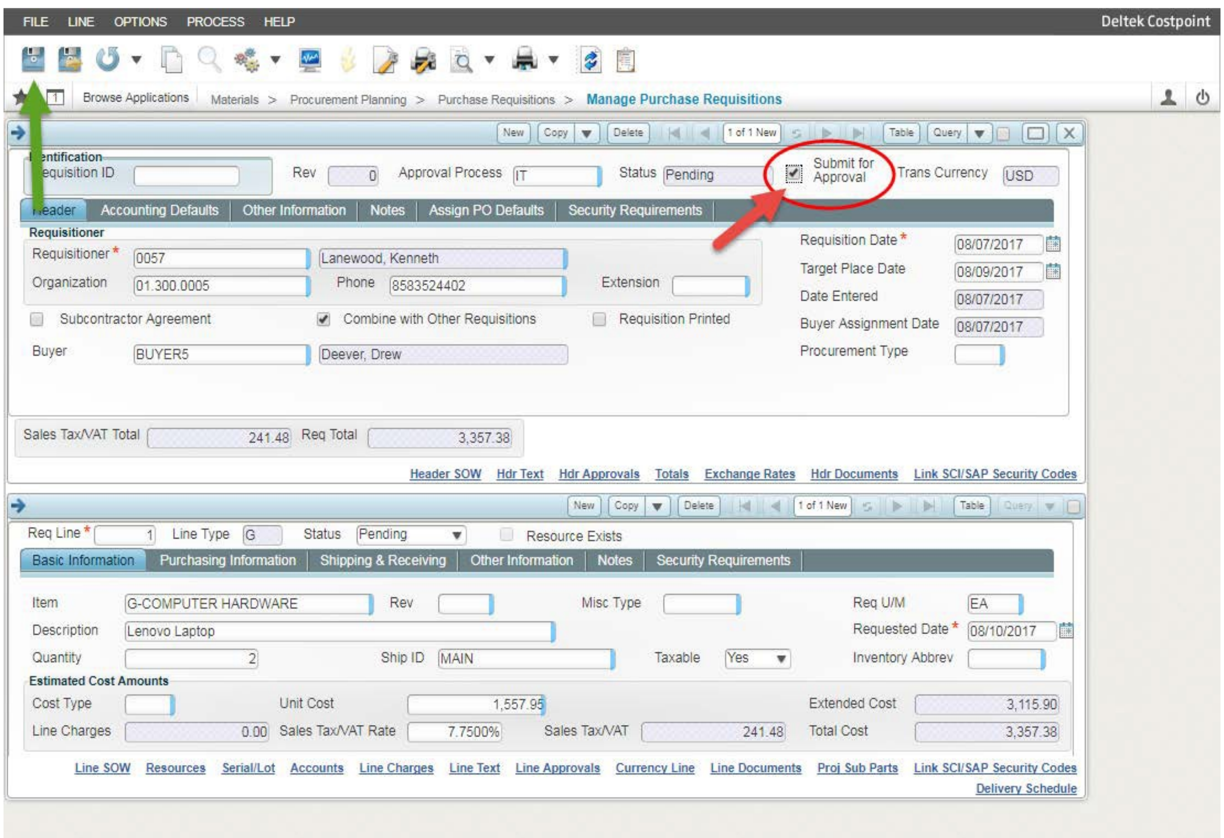
19. Click on the **Notes** tab. Under **Internal Notes** enter the budget and contract tracking numbers. Note: Line notes will show up on the PO.



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.



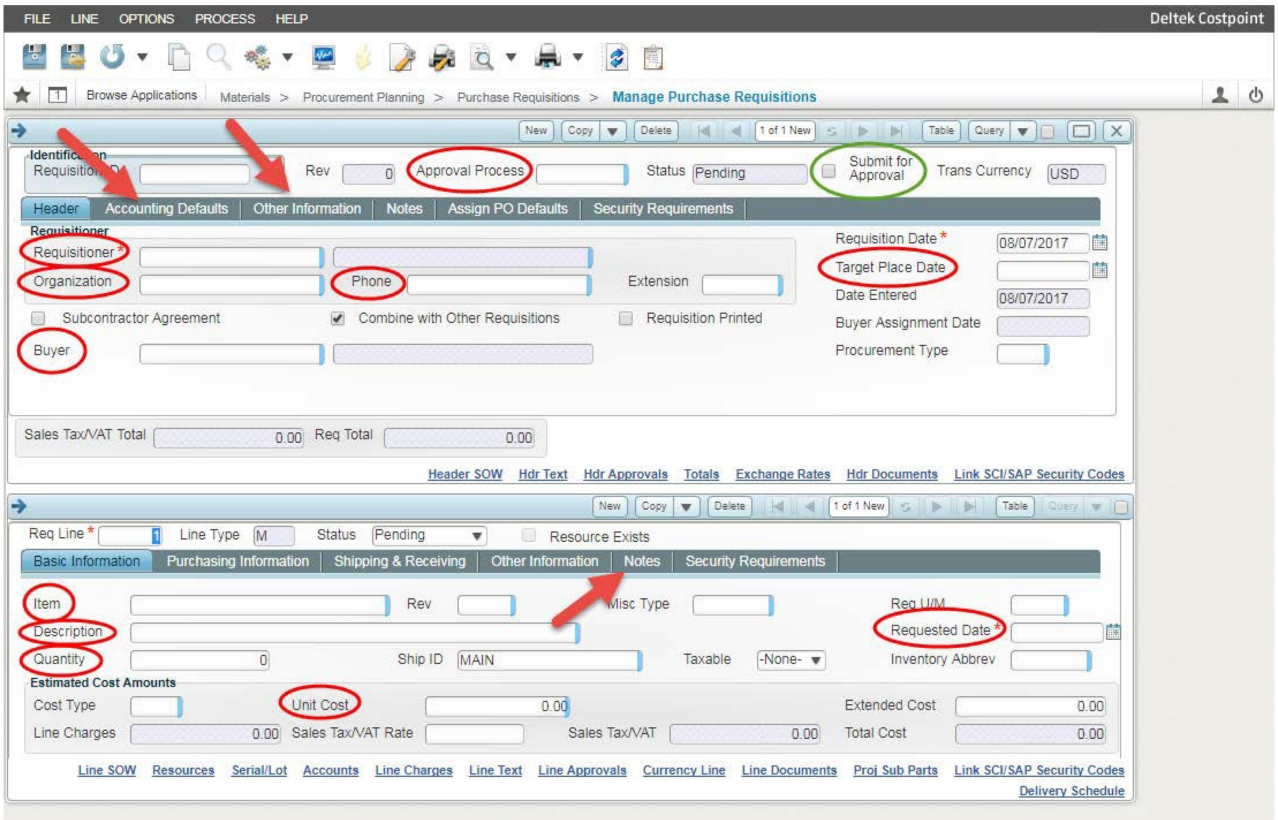
21. Once you are ready to submit your PR for approval, check the box **Submit for Approval** then click save.



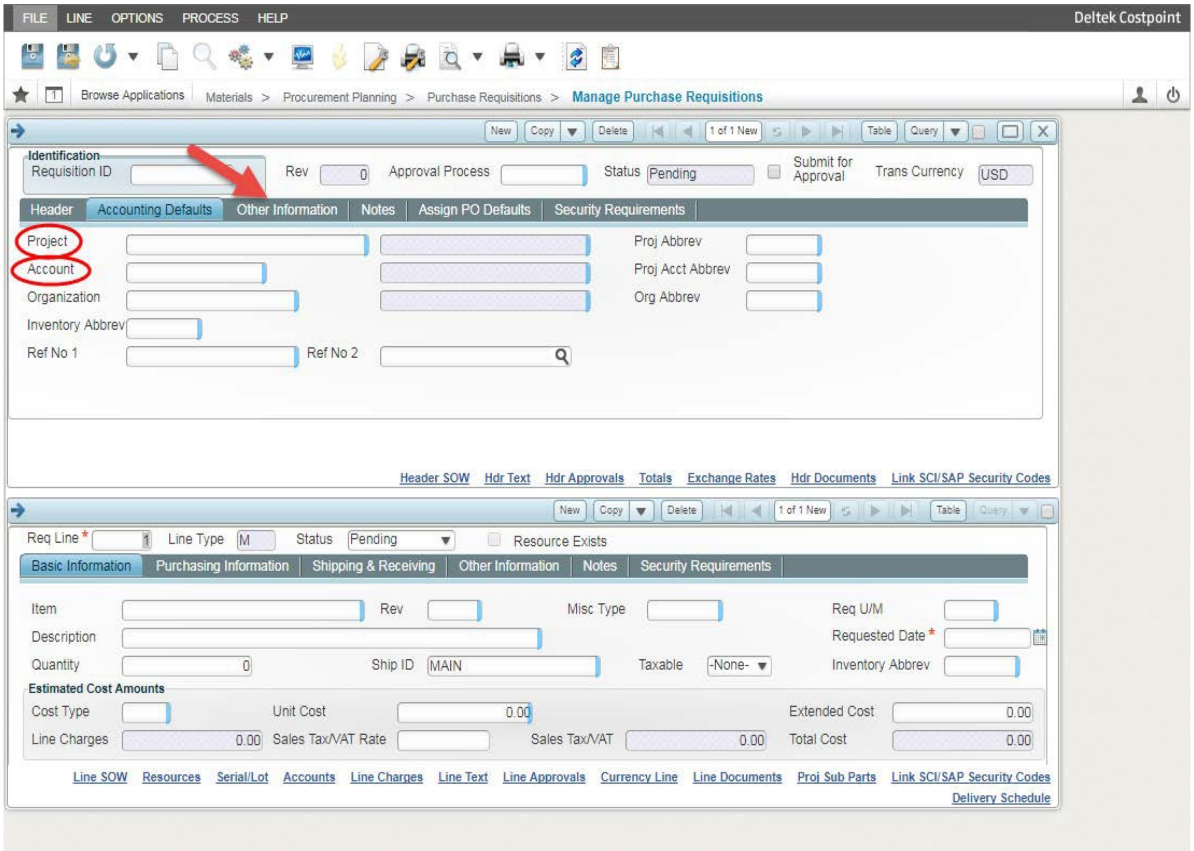
Cliff Notes

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:



Accounting Defaults Tab:



Other information Tab and Notes tab.