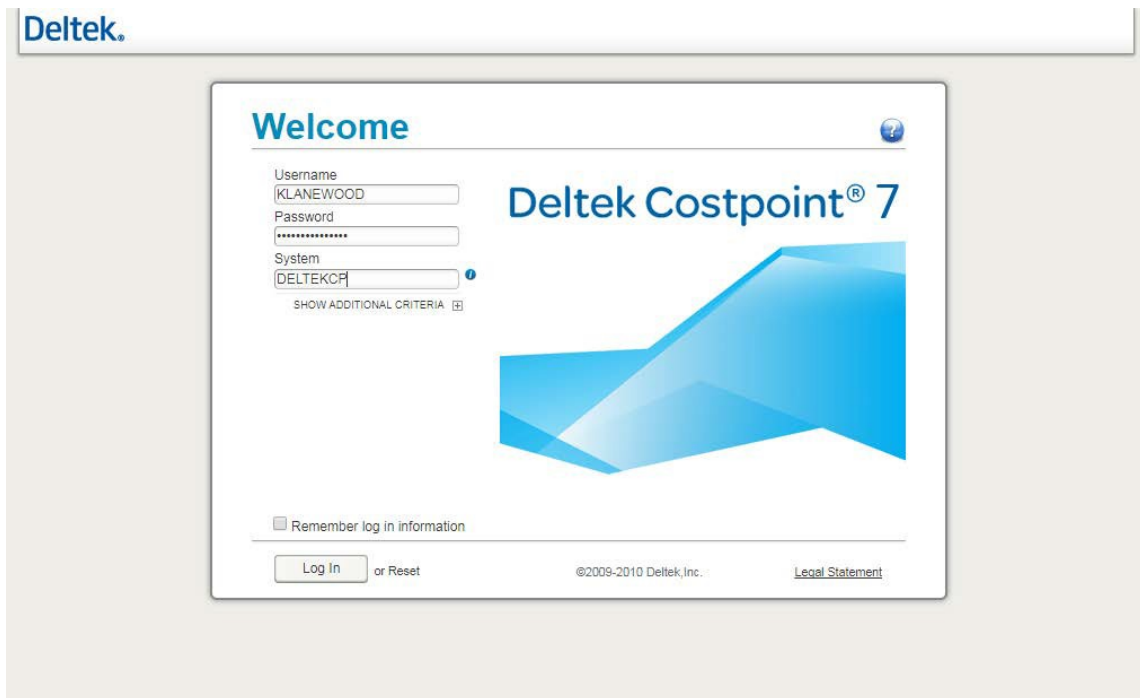


How to enter a purchase requisition (PR)

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



Deltek.

Welcome

Username
KLANEWOOD

Password

System
DELTEKCP

SHOW ADDITIONAL CRITERIA

Deltek Costpoint® 7

Remember log in information

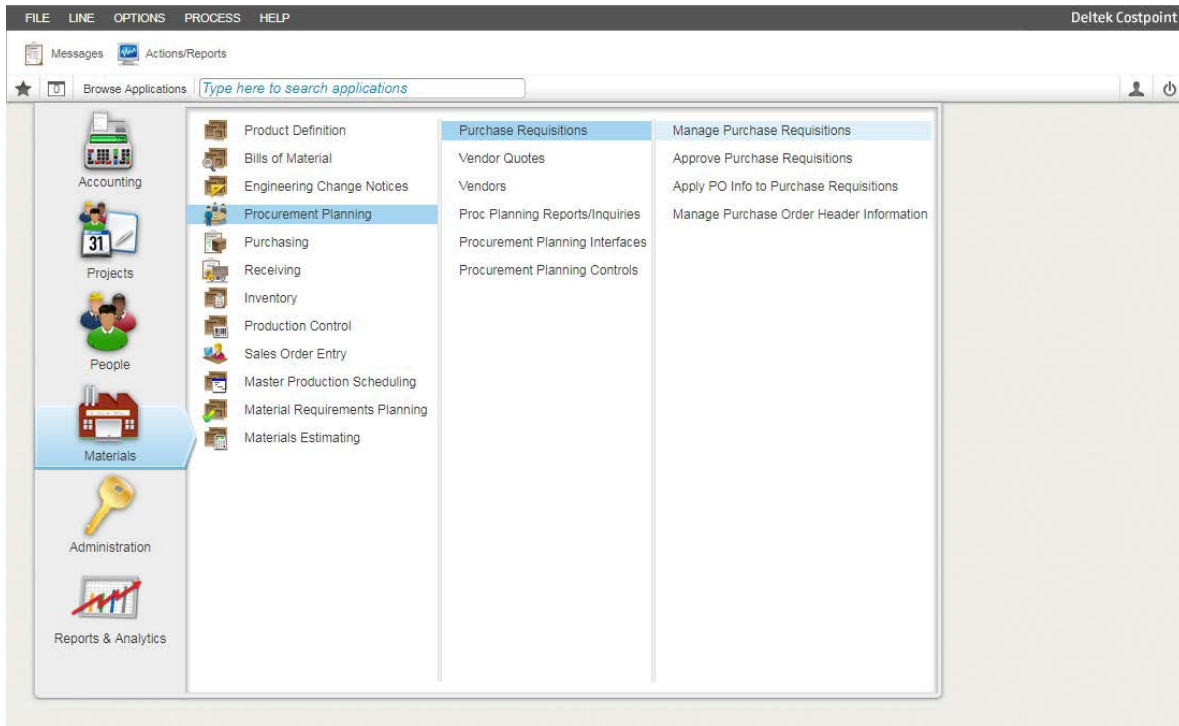
Log In or Reset

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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).

The screenshot shows the 'Manage Purchase Requisitions' window in Delttek Costpoint. The window has a menu bar (FILE, LINE, OPTIONS, PROCESS, HELP) and a toolbar with various icons. The main area is divided into several sections:

- Identification:** Requisition ID, Rev (0), Approval Process, Status (Pending), Submit for Approval, Trans Currency (USD).
- Header:** Accounting Defaults, Other Information, Notes, Assign PO Defaults, Security Requirements.
- Requisitioner:** Requisitioner, Organization, Phone, Extension, Requisition Date (08/07/2017), Target Place Date, Date Entered (08/07/2017), Buyer Assignment Date, Procurement Type.
- Subcontractor Agreement:** Subcontractor Agreement, Combine with Other Requisitions, Requisition Printed.
- Buyer:** Buyer.
- Sales Tax/VAT Total:** 0.00, **Req Total:** 0.00.
- Requisition Lines:** A table view with columns: Req Line, Status, Line Type, Item, Misc Type, Description, Request Date. A red arrow points to the 'Form' button in the toolbar above the table.

At the bottom of the window, there are several links: Line SOW, Resources, Serial/Lot, Accounts, Line Charges, Line Text, Line Approvals, Currency Line, Line Documents, Proj Sub Parts, Link SCI/SAP Security Codes, and Delivery Schedule.

5. Form View example:

The screenshot shows the 'Form View' for a requisition line in Delttek Costpoint. The window has a menu bar (FILE, LINE, OPTIONS, PROCESS, HELP) and a toolbar with various icons. The main area is divided into several sections:

- Req Line:** Req Line (1), Line Type (M), Status (Pending), Resource Exists.
- Basic Information:** Item, Description, Quantity (0), Ship ID (MAIN), Taxable (-None-), Inventory Abbrev.
- Purchasing Information:** Rev, Misc Type, Req U/M, Requested Date.
- Estimated Cost Amounts:** Cost Type, Unit Cost (0.00), Extended Cost (0.00), Line Charges (0.00), Sales Tax/VAT Rate, Sales Tax/VAT (0.00), Total Cost (0.00).
- Other Information:** Notes, Security Requirements.

At the bottom of the window, there are several links: Line SOW, Resources, Serial/Lot, Accounts, Line Charges, Line Text, Line Approvals, Currency Line, Line Documents, Proj Sub Parts, Link SCI/SAP Security Codes, and Delivery Schedule. A red arrow points to the 'Table' button in the toolbar above the form.

Step by Step Instructions

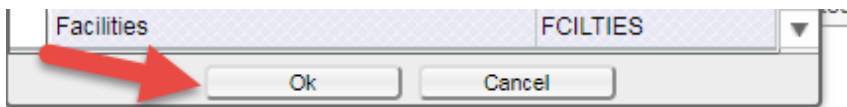
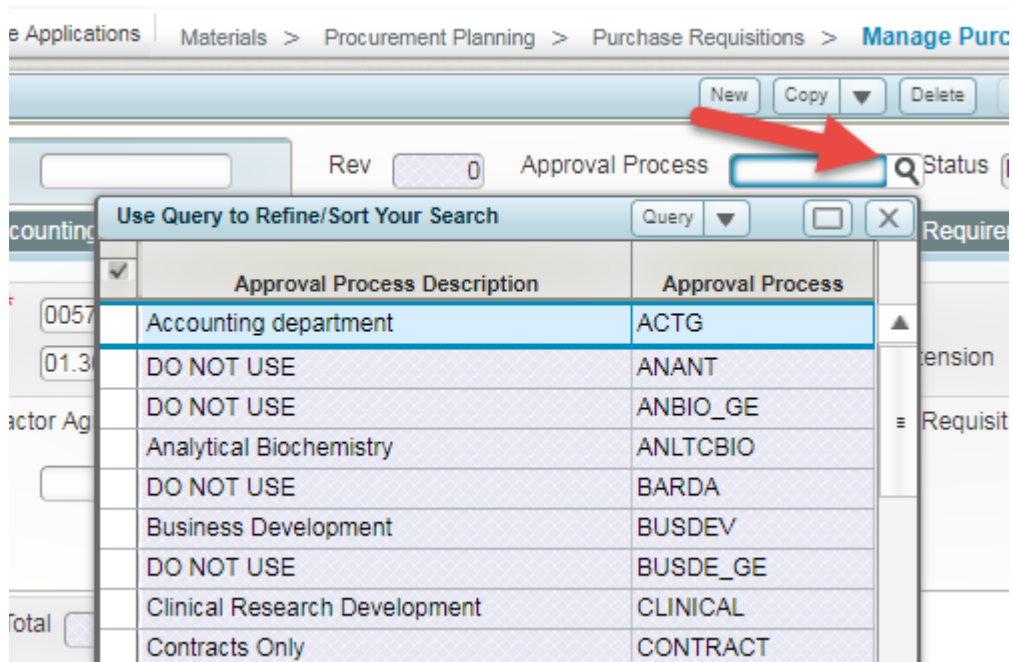
1. Enter the Approval Process.

The screenshot displays the 'Manage Purchase Requisitions' window in Deltek Costpoint. The 'Approval Process' dropdown menu is highlighted with a red circle. The interface includes the following elements:

- Identification:** Requisition ID, Rev (0), Approval Process (highlighted), Status (Pending), Submit for Approval checkbox, Trans Currency (USD).
- Header:** Accounting Defaults, Other Information, Notes, Assign PO Defaults, Security Requirements.
- Requisitioner:** Requisitioner*, Organization, Phone, Extension, Requisition Date* (08/07/2017), Target Place Date, Date Entered (08/07/2017), Buyer Assignment Date, Procurement Type.
- Options:** Subcontractor Agreement, Combine with Other Requisitions (checked), Requisition Printed.
- Buyer:** Buyer field.
- Totals:** Sales Tax/VAT Total (0.00), Req Total (0.00).
- Requisition Lines:** A table with columns: Req Line*, Status, Line Type, Item, Misc Type, Description, Request Date*.

Navigation links at the bottom include: Line SOW, Resources, Serial/Lot, Accounts, Line Charges, Line Text, Line Approvals, Currency Line, Line Documents, Proj Sub Parts, Link SCI/SAP Security Codes, and Delivery Schedule.

- 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.

The screenshot shows the 'Manage Purchase Requisitions' window in Deltek Costpoint. The 'Identification' tab is active, displaying fields for Requisition ID, Rev (0), Approval Process, Status (Pending), Submit for Approval, and Trans Currency (USD). Below this, there are tabs for Header, Accounting Defaults, Other Information, Notes, Assign PO Defaults, and Security Requirements. The 'Requisitioner' field is highlighted with a red arrow, and a dropdown menu is open showing options: 0050, 0051, 0053, 0054, 0057, and 0059. Other fields include Requisition Date (08/07/2017), Target Place Date, Date Entered (08/07/2017), Buyer Assignment Date, and Procurement Type. At the bottom, there are tabs for Basic Information, Purchasing Information, Shipping & Receiving, Other Information, Notes, and Security Requirements. The 'Notes' tab is selected, showing 'Line Notes' and 'Internal Notes' sections.

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.

The screenshot shows a software interface with a 'Requisitioner' field containing '0057'. A search window titled 'Use Query to Refine/Sort Your Search' is open, displaying a list of employees. The row for 'Lanewood, Kenneth' with Employee ID '0057' is highlighted. Red arrows point to the lookup icon, the search results table, and the 'Ok' button.

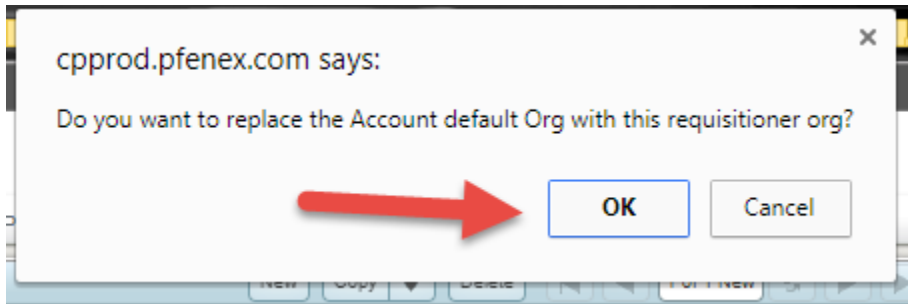
Employee Name	Preferred Name	Employee ID	City	St
Jin, Hongfan		0015		
Johnson, Maxine		0095		
Kinley, Brian		0094		
Knight, Sam		0114		
Lady, Patricia	Trish	0031		
Lanewood, Kenneth	Ken	0057		
Lasala, Robert C	Robert	0016		
Lee, Yinghui		0115		
Liang, Bertrand	Bert	0002		
Lucy, Patrick	Pat	0019		
Maki, Steven	Steven	0020		
Malik-Chaudhry, Harbani		0074		
Martinez, Mindy		0071		
McAllister, Jim		0112		
Means, Chris		0093		

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.

The screenshot shows a software interface with several tabs: Header, Accounting Defaults, Other Information, Notes, Assign PO Defaults, and Security Requirements. The 'Other Information' tab is selected. In the 'Requisitioner' section, the 'Organization' field is highlighted with a red box and contains the value '01.100.0001'. A red arrow points from the 'Other Information' tab to the 'Organization' field. Below the main form, a 'Use Query to Refine/Sort Your Search' dialog box is open, displaying a table of organizations. The table has columns for Organization, Abbreviation, Name, and Taxable. The 'Ok' button at the bottom of the dialog box is highlighted with a red arrow.

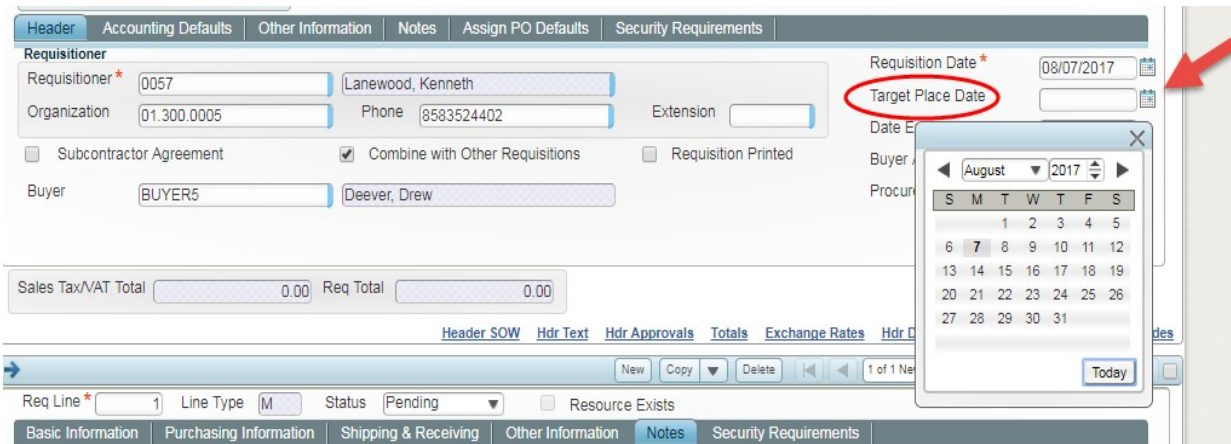
Organization	Abbreviation	Name	Taxable
01.100.0013	1013	POQ Admin	1
01.100.0014	1014	Process Dev	1
01.100.0015	1015	Operations	1
01.100.0016	1016	Process Characterization	1
01.200		Sales and Marketing	1
01.200.0001	2001	S&M External Alliances	1
01.200.0002	2002	S&M Business Development	1
01.200.0003	2003	Marketing	1
01.300		Admin	1
01.300.0001	3001	Accounting	1
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

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.

FILE LINE OPTIONS PROCESS HELP

Browse Applications Materials > Procurement Planning > Purchase Requisitions > Manage Purchase Requisitions

Identification Requisition ID: [] Rev: 0 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 IT - General Proj Abbrev: []

Account: [] Proj Acct Abbrev: []

Organization: 01.300.0005 IT Org Abbrev: 3005

Inventory Abbrev: [] Ref No 1: [] Ref No 2: []

Header SOW Hdr Text Hdr Approvals Totals Exchange Rates Hdr Documents Link SCI/SAP Security Codes

Requisition Lines

Identification Requisition ID: [] Rev: 0 Approval Process: IT Status: Pending

Header Accounting Defaults Other Information Notes Assign PO Defaults Security Requirements

Project: 8ADMIN.IT.001 IT - General Proj Abbrev: []

Account: []

Organization: [] Proj Abbrev: []

Inventory Abbrev: [] Org Abbrev: []

Ref No 1: []

Use Query to Refine/Sort Your Search

Account	Account Name	Account Type
630-330-000-001	Genl, Property, Crime Ins	N
630-330-000-002	D & O Insurance	N
630-330-000-003	Product Insurance	N
630-330-000-004	Auto Insurance	N
630-330-000-005	Umbrella Insurance	N
630-330-000-006	Cyber Crime Insurance	N
630-330-000-007	EPL Insurance	N
630-340-001-001	Office Supplies	N
630-340-001-002	Computer Supplies	N
630-340-002-001	PP&E less than \$1,000	N
630-340-003-001	Office Equipment Lease	N
630-350-000-001	Local/LD Telephone	N
630-350-000-002	Cell Phone	N
630-350-000-003	Internet Expense	N
630-350-000-004	Conference Calls	N
630-360-000-001	Employee Training	N

Ok Cancel

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**.

The screenshot shows the 'Other Information' tab of a requisition form. The 'Requested Date' field is set to 08/10/2017. The 'Ship ID' is set to MAIN. The 'Ship Via' field is empty. The 'Deliver To' field is empty. The 'Preferred Vendor' field is empty. The 'Sugg Blanket PO' field is empty. The 'PO' field is empty. The 'Discount' field is set to 0.00%. The 'Tax Status' is set to Use Item Type Default. The 'Over Budget Validation' is set to No. The 'Export' is set to -None-. The 'GSA' checkbox is unchecked. The 'Auto-default Header Text' checkbox is checked. The 'Status' is Pending. The 'Trans Currency' is USD.

11. Choose your **Preferred Vendor**

The screenshot shows the 'Other Information' tab of a requisition form. The 'Requested Date' field is set to 08/10/2017. The 'Ship ID' is set to MAIN. The 'Ship Via' field is empty. The 'Deliver To' field is set to Kenneth Lanewood. The 'Preferred Vendor' field is set to CDW00000. The 'Sugg Blanket PO' field is empty. The 'PO' field is empty. The 'Discount' field is set to 0.00%. The 'Tax Status' is set to Use Item Type Default. The 'Over Budget Validation' is set to No. The 'Export' is set to -None-. The 'GSA' checkbox is unchecked. The 'Auto-default Header Text' checkbox is checked. The 'Status' is Pending. The 'Trans Currency' is USD.

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

The screenshot shows the 'Notes' tab of a requisition form. The notes field contains the text: Please specify Lot [D416857](#). The 'Status' is Pending. The 'Trans Currency' is USD.

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

The screenshot shows a software interface with two main sections. The top section is for requisition identification and defaults, including fields for Requisition ID, Rev, Approval Process, Status, and various default settings. The bottom section, circled in red, is for line item details. It includes fields for Item, Description, Quantity, Ship ID, Taxable, and Estimated Cost Amounts. The 'Item' field is currently empty, and the 'Description' field contains 'G-COMPUTER HARDWARE' and 'G-COMPUTER SOFTWARE'.

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

The screenshot shows the same software interface as above, but with the 'Item' field circled in red and a red arrow pointing to the search icon next to it. The 'Description' field is now populated with 'G-COMPUTER HARDWARE' and 'G-COMPUTER SOFTWARE'. The 'Quantity' field is set to 0, and the 'Unit Cost' is 0.00. The 'Total Cost' is also 0.00.

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

Req Line * 1 Line Type G Status Pending Resource Exists

Basic Information Purchasing Information Shipping & Receiving Other Information Notes Security Requirements

Item G-COMPUTER HARDWARE Rev Misc Type Req U/M EA

Description ENTER DETAILED GOODS INFORMATION 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 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

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

Req Line * 1 Line Type G Status Pending Resource Exists

Basic Information Purchasing Information Shipping & Receiving Other Information Notes Security Requirements

Item G-COMPUTER HARDWARE Rev Misc Type Req U/M EA

Description Lenovo Laptop Requested Date *

Quantity 1 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 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.

The screenshot shows a software interface for a purchase requisition line. The 'Requested Date' field is highlighted with a red circle, and a calendar pop-up is open, showing the month of August 2017. A red arrow points to the 'Requested Date' field. The interface includes tabs for 'Basic Information', 'Purchasing Information', 'Shipping & Receiving', 'Other Information', 'Notes', and 'Security Requirements'. The 'Basic Information' tab is active, showing fields for 'Item' (G-COMPUTER HARDWARE), 'Description' (Lenovo Laptop), 'Quantity' (2), 'Ship ID' (MAIN), 'Taxable' (Yes), and 'Inventory Abbrev'. The 'Estimated Cost Amounts' section shows 'Unit Cost' (1,567.95), 'Extended Cost' (3,115.90), 'Line Charges' (0.00), 'Sales Tax/VAT Rate' (7.7500%), 'Sales Tax/VAT' (241.48), and 'Total Cost' (3,357.38).

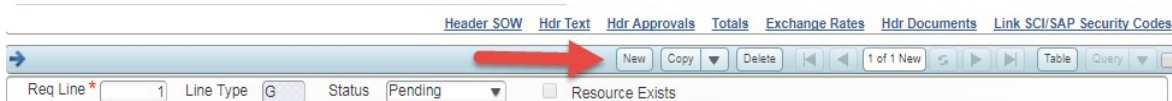
18. Click on the Purchasing tab. Choose Preferred Vendor from drop-down and add the Vendor Part to the field.

The screenshot shows the 'Purchasing Information' tab selected. The 'Preferred Vendor' field is highlighted with a red circle and contains the value 'CDW00000'. The 'Vendor Part' field is also highlighted with a red circle and contains the value 'TIB0541'. A red arrow points to the 'Purchasing Information' tab. The interface includes tabs for 'Basic Information', 'Purchasing Information', 'Shipping & Receiving', 'Other Information', 'Notes', and 'Security Requirements'. The 'Purchasing Information' tab is active, showing fields for 'Buyer' (BUYER5), 'Assignment Date', 'Delivery Schedule Exists', 'Target Place Date' (05/18/2019), 'Preferred Quote', 'Suggested Blanket PO', and 'Procurement Type'.

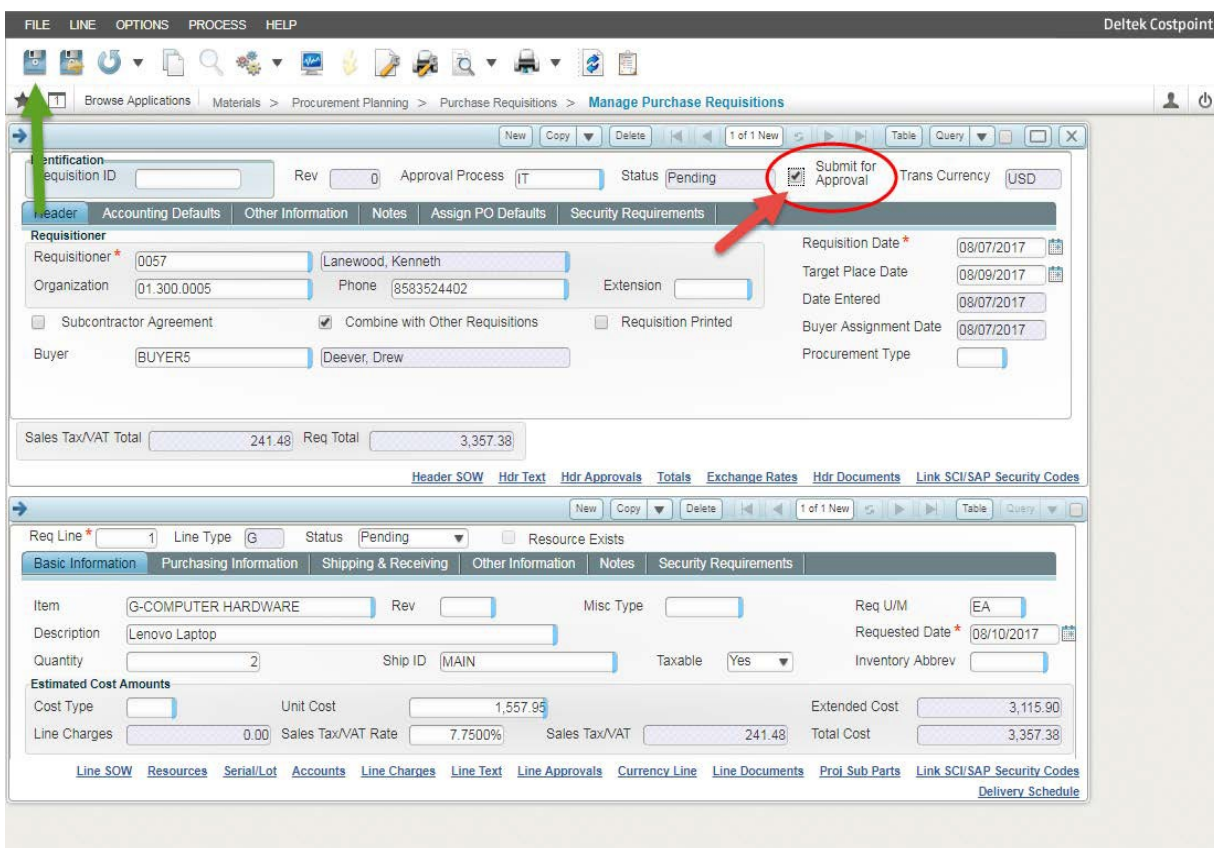
19. Click on the Notes tab. Under Internal Notes enter the budget and contract tracking numbers. Note: Line notes will show up on the PO.

The screenshot shows the 'Notes' tab selected. The 'Internal Notes' field is highlighted with a red circle and contains the text 'CID N/A IT-123'. A red arrow points to the 'Notes' tab. The interface includes tabs for 'Basic Information', 'Purchasing Information', 'Shipping & Receiving', 'Other Information', 'Notes', and 'Security Requirements'. The 'Notes' tab is active, showing fields for 'Line Notes' and 'Internal Notes'.

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:

The screenshot shows the 'Manage Purchase Requisitions' window in Delttek Costpoint. The interface is divided into two main sections: the Header and the Req Line.

Header Section:

- Identification:** Requisition ID, Rev (0), Approval Process, Status (Pending), Submit for Approval, Trans Currency (USD).
- Requisitioner:** Requisitioner, Organization, Phone, Extension, Requisition Date* (08/07/2017), Target Place Date, Date Entered (08/07/2017), Buyer Assignment Date, Procurement Type.
- Buyer:** Buyer.
- Summary:** Sales Tax/VAT Total (0.00), Req Total (0.00).
- Navigation:** Header SOW, Hdr Text, Hdr Approvals, Totals, Exchange Rates, Hdr Documents, Link SCI/SAP Security Codes.

Req Line Section:

- Basic Information:** Req Line*, Line Type (M), Status (Pending), Resource Exists, Item, Description, Quantity (0), Ship ID (MAIN), Taxable (-None-), Inventory Abbrev.
- Estimated Cost Amounts:** Cost Type, Unit Cost (0.00), Extended Cost (0.00), Line Charges (0.00), Sales Tax/VAT Rate, Sales Tax/VAT (0.00), Total Cost (0.00).
- Navigation:** 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.

Annotations:

- Red arrows point to the Requisition ID, Rev, and Approval Process fields.
- Red circles highlight Requisitioner, Organization, Buyer, Item, Description, Quantity, Unit Cost, and Requested Date.
- A green circle highlights the Submit for Approval checkbox.
- A red arrow points to the Notes tab in the Req Line section.

Accounting Defaults Tab:

The screenshot displays the 'Manage Purchase Requisitions' window in Deltek Costpoint. The 'Accounting Defaults' tab is selected, and the 'Project' and 'Account' fields are circled in red. A red arrow points to the 'Accounting Defaults' tab label. The window shows various fields for requisition identification, accounting defaults, and line item details.

Identification

Requisition ID Rev 0 Approval Process Status Pending Submit for Approval Trans Currency USD

Header Accounting Defaults Other Information Notes Assign PO Defaults Security Requirements

Project

Account

Organization

Inventory Abbrev

Ref No 1 Ref No 2

[Header SOW](#) [Hdr Text](#) [Hdr Approvals](#) [Totals](#) [Exchange Rates](#) [Hdr Documents](#) [Link SCI/SAP Security Codes](#)

Req Line * **Line Type** M **Status** Pending Resource Exists

Basic Information Purchasing Information Shipping & Receiving Other Information Notes Security Requirements

Item Rev Misc Type Req U/M

Description

Quantity 0 Ship ID MAIN Taxable -None- Inventory Abbrev

Estimated Cost Amounts

Cost Type Unit Cost 0.00 Extended Cost 0.00

Line Charges 0.00 Sales Tax/VAT Rate 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](#)

Other information Tab and Notes tab.

