COSTPOINT PURCHASE REQUISITIONS

Procure to Pay

Contents

Contacts

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Reference Documents

Refer to the Amentum Library on OneJavelin

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Process Overview

This purchase requisition document is the procedure through which a Purchase Requisition is entered into Costpoint by Material planners, operations personnel, and administrative personnel. Purchase Requisitions are required for all purchases (with the exception of Petty Cash) according to Amentum policy, including direct purchases, indirect purchases, P-Card purchases (refer to the training guides for P-Card Integrated and P-Card Non-Integrated procedures), and purchases requiring a Pre-Payment. Purchase Requisition is the document of record for approvals to commence a procurement action.

Requisition Entry requires the user to choose between selecting a Part, or Service, and each has specific requirements, descriptions, and benefits. Additionally, the user will be required to enter proper charge codes, estimated quantity, estimated cost, and required delivery dates (for both approval and tracking purposes).

Once entered and submitted for approval, Costpoint offers multiple options for tracking status and progression of a Requisition as it is approved and delivered to a Buyer/SCA for purchasing. This will allow increased traceability, accountability, and overall processing speed for all Procurement functions.

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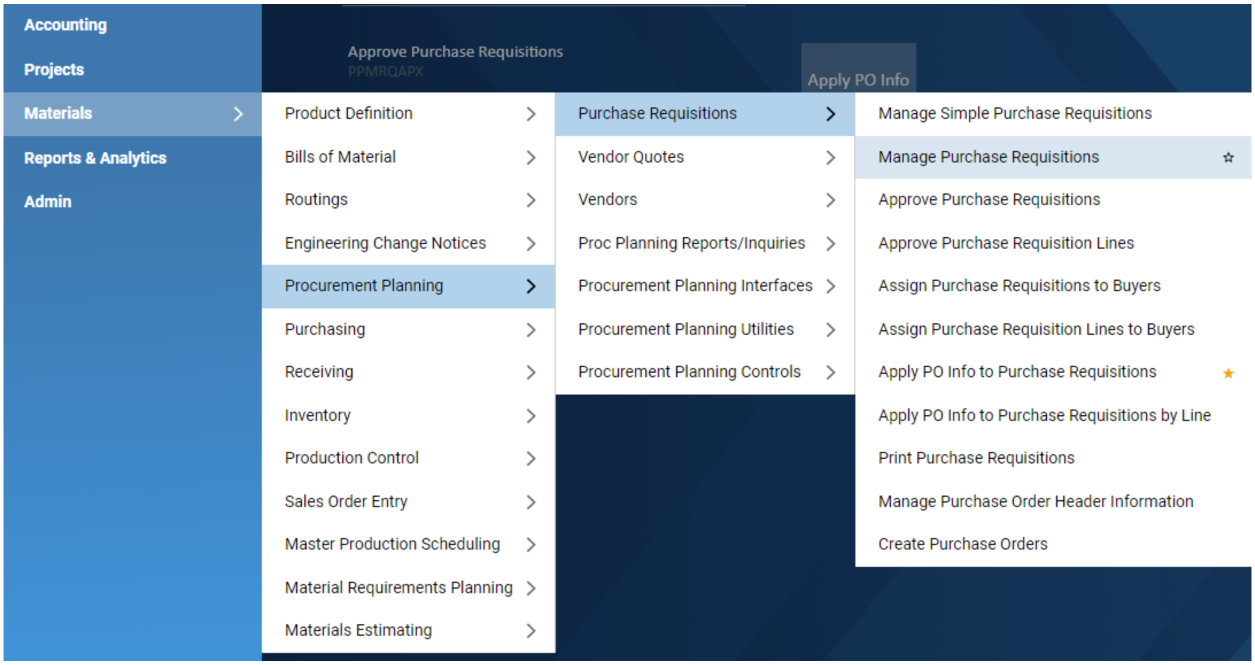
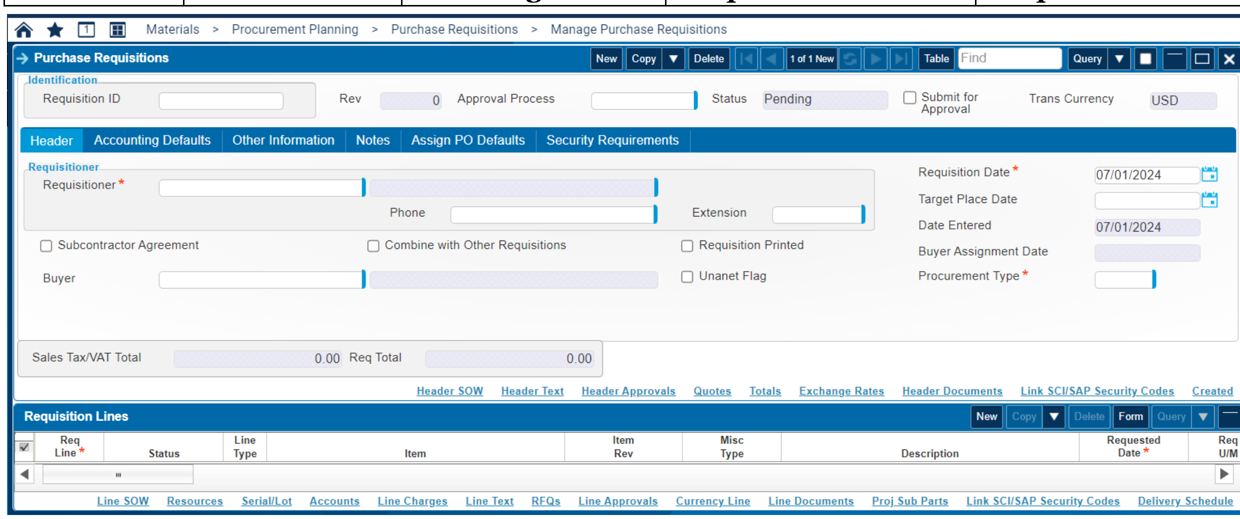
Creating a Purchase Requisition



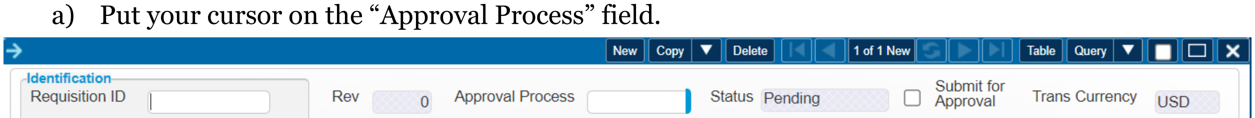
Open the "Manage Purchase Requisitions" screen.

	***Domain Menu*** **Materials**	***Module*** **Procurement Planning**	***Application Group*** **Purchase Requisitions**	***Application Screen*** **Manage Purchase Requisitions**



Enter the Appropriate Approval Process

a) Put your cursor on the "Approval Process" field.

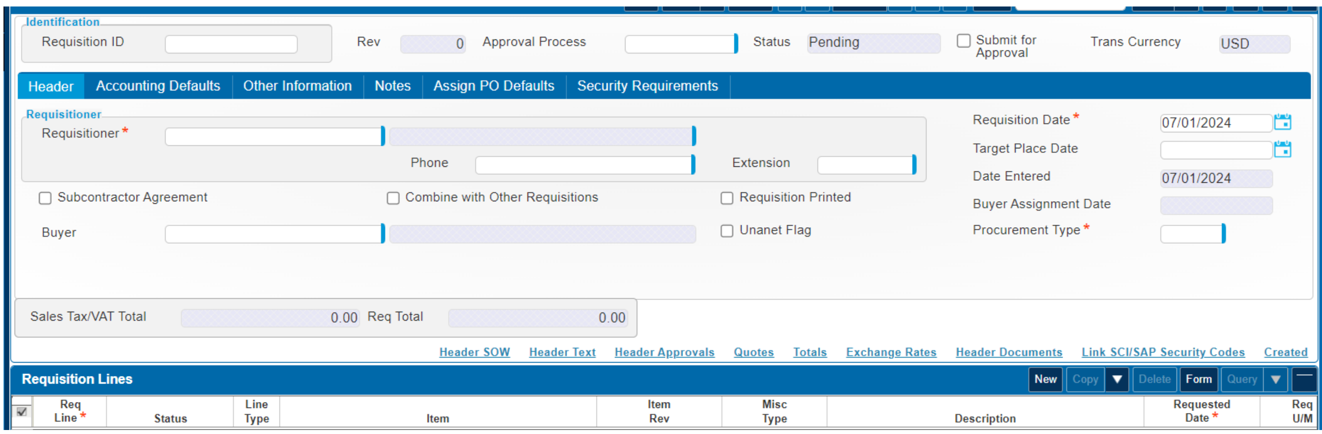


b) Then click the Lookup button on the Toolbar.

c) Select the appropriate Approval Process by clicking field to highlight it and then clicking Select.

Note: The approval process refers to the Amentum Approvals required as per Amentum's Delegation of Authority. The structure of the processes is generic, with the descriptions providing the detailed workflow name. This can be searched by typing any part of the program name in the approval process field. If not known, can be provided by the Program Budget Owner. If Approval Process needs to be created, submit a Service Now ticket: [GSCM Request](#).

Click the Header Tab to display the "Header/Defaults" screen.



The Headers screen is used to provide information and data that will be the default for each requisition line item.

1) **Enter Header Information**

a) **<u>Requisitioner-</u>** This will default to the current logged-in user. If not prepopulated, you will need to add the company suffix to the ID to have it validated. Please note that the Requisitioner ID will default to your six (6) digit Employee ID, please add the company of your home organization (where you are assigned) as the suffix, i.e.: 520473, home org is company 2, update it 52047302.

Note: Requisitioner is assumed to be the person responsible for entering material receipt data into the system.

i) Tab to or place your cursor in the Requisitioner "ID" field.

ii) Click on the Lookup button from the Toolbar.

iii) Click on the appropriate Employee (Requisitioner) name.

iv) Click on the Select button.

Note: When selecting Employee (Requisitioner) note the potential added responsibilities. Requisitioner should have access to OnBase application. In the event of that invoice related to the resulting order has any receiving issues submitted by the vendor, OnBase will notify the Requisitioner that an action is required, as the system will default the Requisitioner as a Receiver in the system and those invoices will be routed with notes into Requisitioner's OnBase queue. If access to OnBase required, submit a Service Now ticket: [OnBase Request](#).

b) <u>Buyer</u> - The buyer you would like to assign the requisition to. If you know the specific Buyer you wish to send the Requisition to, click on the "Buyer" field, click the Lookup button on the Toolbar, and select the appropriate Buyer. If you are not certain what Buyer to assign the

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Requisition to, select the appropriate Purchasing Manager, and they will then reassign to the correct buyer for this effort.

c) Requisition Date - This column displays the date when the requisition was created. Requisition date is defaulted as the date when the requisition is entered into the system, however, this date can be manually changed if required.

d) Target Place Date – This column displays the date that you anticipate the Buyer generating the purchase order and placing the buy in order to receive the requisitioned item by the "Requested Date". Tab to or place your cursor in the "Target Place Date" field and manually enter a date. Target place date is not a required field.

Note: Target Place Date should be reasonable IAW with the general processing times stated in our policy: SCM-715-1A Acquisition Planning.

e) Date Entered - Date entered is the date when the requisition is created. This field cannot be changed as it is a system generated field.

f) Buyer Assigned Date - Buyer assignment date is not a required field in Costpoint. Buyer Assignment Date is not a fillable field and would be blank, once a Buyer is selected, the Buyer Assignment Date auto populates with the current date and cannot be changed.

g) Extension: This field is used to identify the *Priority* of the purchase. The options include: i) 02 – AOG/Emergency/Urgent, 05 – Work Stoppage/Critical, 12 – Routine/Stock

h) **Procurement Type** - Procurement types are used to categorize the procurement type code for the whole requisition. Please note that this field is a required field to accommodate the Vendor Invoice Submission Tool called VPConnect. The options for this field are either: i) Competitive ii) Single Source/Sole Source. Although you may see other options, please select only one of these options as the other options are reserved for the Purchase Order.

   i) Tab to or place your cursor in the "Procurement Type" field.

   ii) Click on the Lookup button on the Toolbar.

   iii) Click the appropriate Procurement Type for this procurement.

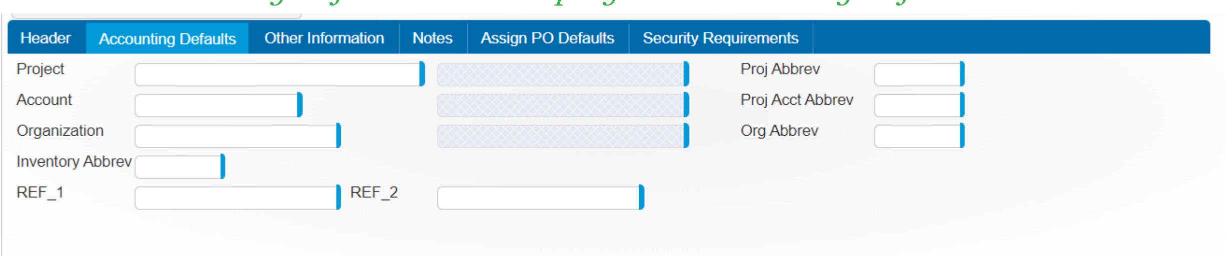
   iv) Click the Select button.

i) **Unanet Flag** - This field is used to identify if this purchase requisition is to be for ONLY MISC Type (SUBKLA, SUBKEX and SUBKOD) can be selected for this request.

   i) Check the checkbox if the request is for Misc Type.

   ii) Validations are added on purchase requisition line, where ONLY MISC Type (SUBKLA, SUBKEX or SUBKOD can be selected).

Click the Accounting Defaults tab to display the "Accounting Defaults" screen.



2) **Enter Accounting Information**

Note: If you are not certain on the Project/Account IDs, please contact the Finance Manager on your program.

a) Project - Project ID

   i) Tab to or place your cursor in the "Project" field.

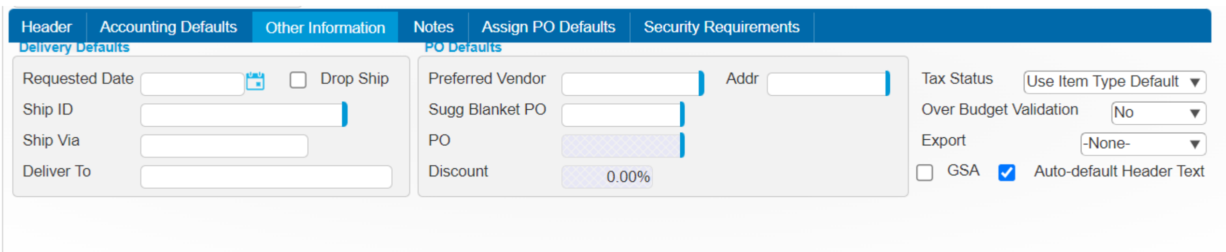
   ii) Click on the Lookup button on the Toolbar.

iii) Click on the appropriate Project to which the requisition will be charged.
iv) Click the Select button.

b) Account - Account ID.
   i) Tab to or place your cursor in the “Account” field.
   ii) Click on the Lookup button on the Toolbar.
   iii) Click on the appropriate General Ledger Account for the requisition to be charged.
   iv) Click the Select button.

c) Organization - Organization ID. The Project’s organization will default.

Click the Other Information tab to display the “Other Information” screen.



3) **Enter Other Information**

a) Requested Date - Tab to or place your cursor in the “Requested Date” field and manually enter a date the items are to be received by. Requested date is a required field. For materials, this is the date that the requestor expects delivery of their required items (due date), and for services, it indicates the end of the Period of Performance (POP), enter the date the services are to be completed by.

b) Ship ID: determines where the item being requisitioned will be delivered. This is a requirement for all materials to identify where the items need to be shipped to. This is broken out by company, where each location has a Unique ID. The 1st 2 characters, refer to the Company ID, and the next characters is a sequential number linked to a specific legal entity (for branches), or just a warehouse ID. This can be entered in the Header Subtask, or at the line-item level.

   Note: If Ship ID is not available in the Costpoint for the Purchase Requesting, proceed with submitting a Service Now ticket: GSCM Request. ***Once the Ship ID is added to Costpoint, the Ship ID will be communicated to you.***

   i) Tab to or place your cursor in the “Ship ID” field.
   ii) Click on the Lookup button on the Toolbar.
   iii) Click the appropriate Ship ID for this procurement.
   iv) Click the Select button.

c) Ship Via: The preferred means of shipping the material requisitioned. Tab to or place your cursor in the “Ship Via” field and manually enter the preferred mode of shipping (UPS, FedEx, freight forwarder, etc.) for this procurement. If no shipping is anticipated, leave this field blank.

d) Deliver To: Tab to or place your cursor in the “Deliver To” field and manually enter the name of the person you want the items to be delivered to.

e) Preferred Vendor: Preferred Vendor for what you would like to requisition.
   i) Tab to or place your cursor in the “Pref Vendor” field.
   ii) Click on the Lookup button on the Toolbar.
   iii) Click the appropriate Preferred Vendor for this procurement.
   iv) Click the Select button.

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Note: Each vendor in Costpoint has a "Vendor Status". There are three different types of Vendor Status:

- ***"Active/OK," - Vendors with a status of "Active/OK" are approved for use on all Amentum procurements.***
- ***"Give Warning," - For vendors with a status of "Give Warning", the system will provide a warning message when you tab/click out of the "Pref Vendor" field. These suppliers may be conditionally approved for use but will require a written explanation in the Internal Notes field.***
- ***"Inactive/On-Hold." - For vendors with a status of "Inactive/On-Hold", the system will not allow their use.***

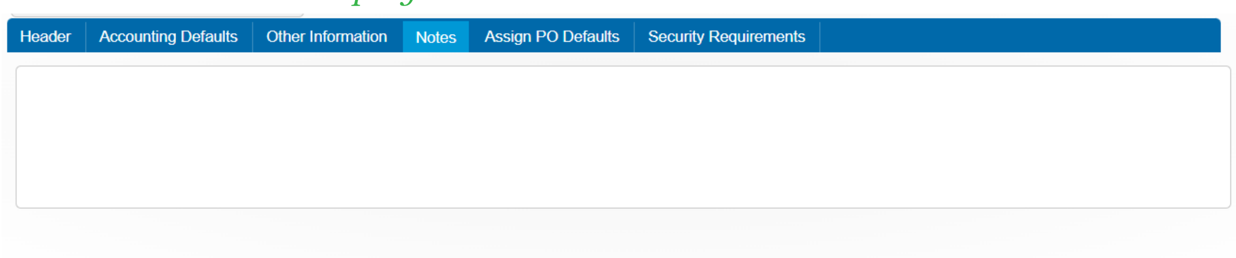
An example of a Costpoint vendor warning message is as follows:

f) Addr: The Vendor Address, this will default to the default vendor order address, if it needs to be adjusted, follow the steps below:
   i) Tab to or place your cursor in the "Vendor Addr" field.
   ii) Click on the Lookup button on the Toolbar.
   iii) Click the appropriate Vendor Address for this procurement.
   iv) Click the Select button.

g) Sugg Blanket PO: Suggested Blanket PO" - If applicable, tab to or place your cursor in the "Suggested Blanket PO" field. Use the Lookup button to select a Blanket PO for the requisition line items. Only use this field if you know your item is contained on a Amentum Blanket purchase order and know what the purchase order number is.

h) Tax Status: The taxable status for the requisition line items. This should be set as "Use Item Type Default".

Click the Notes tab to display the "Notes" screen.



4) Fill out the notes field with information that relates to the entire requisition. This information should provide sufficient details to make the request actionable by the buyer, and/or provide details that the buyer should review prior to making an award. Place your cursor in the "Notes" field and if applicable, manually enter any pertinent text that relates to the entire requisition. These notes will print on the purchase requisition and subsequently, the PO.

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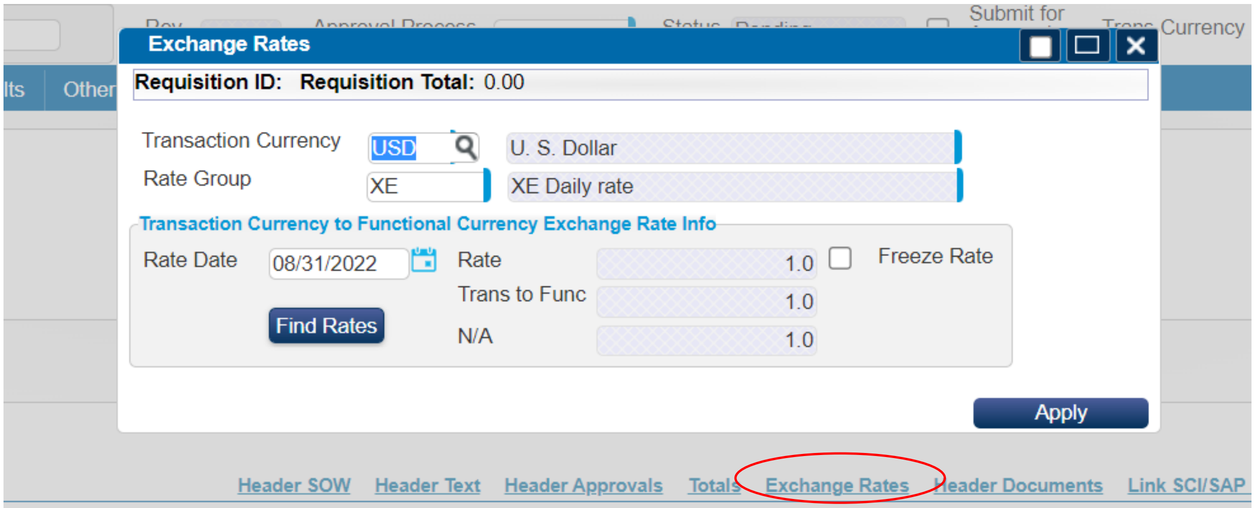
Exchange Rates

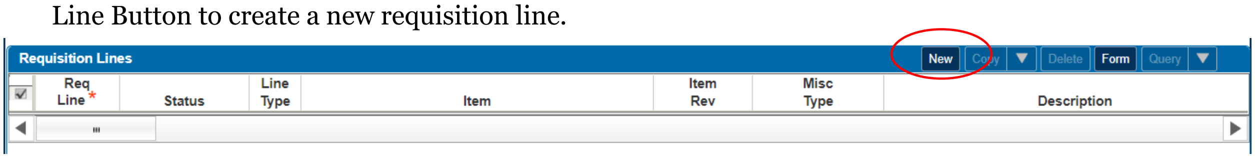


Note: If your PR is in a currency other than the default database currency, then the PR must be created in the foreign currency. If the PR is not in the correct currency, the GSCM will reject the PR as they will not be able to process it.

a) If PR is in a foreign currency select the correct currency in the 'Transaction Currency' field and ensure that 'Rate Group' field is XE.

Entering Requisition Line Data

1) You are now ready to enter the actual line-item information in the Table Window. Click on the New Line Button to create a new requisition line.



2) Click the Lookup button on the Toolbar and select or manually insert all applicable data in each field as you TAB through each line-item column.

Note: Some of the line-item columns will default/autofill from the Header information you entered. Other columns may not be applicable to your requisition or may not be utilized by Amentum at this time.

a) Populate the "Item" field. For the "Item" field specifically, Items in Costpoint are classified as Parts, Goods, Services, and Miscellaneous. Amentum has developed a listing of Goods and Services which can be linked back to the Federal Supply Code. If you feel the Goods or Service Category does not fit your requirement, send your request by submitting a Service Now ticket and provide a detailed explanation as to why a specific Federal Supply Code needs to be added. The following are definitions of each classification:

i) Parts:

Parts are defined by very specific characteristics and include specific ID codes and descriptions that cannot be changed. Therefore, Parts always have a unique part number and description (i.e., "Part 1234-56789: Acme 6X10 Green Tent with Fiberglass Poles and Kevlar Flooring").
Parts can be selected in the "Item" field. For Parts, click the Lookup button and select the actual part number you are looking for. If you do not see the exact part number, you are looking for you will need to fill out Amentum Form "CP Item Master Request" and send it to your program parts and QC request team to have your item added to the system.

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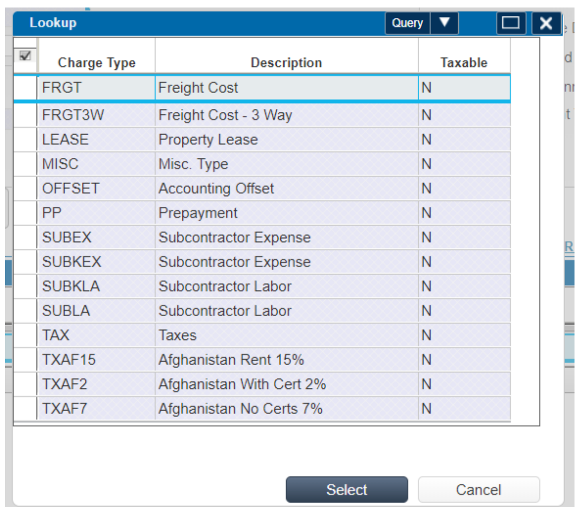
ii) Services:

Services are non-material items such as maintenance, training, consulting, etc. Services can be purchased as either a quantity (hours, days, etc.) or a total cost type of transaction. For Services, click on lookup and then perform a query on the item column by searching for S-. Scroll through the list shown and select the most appropriate Service category. The descriptions in this listing are fairly generic, so once you have selected an item you must add to or change the description section (up to 60 alphanumeric characters) to reflect more accurately the exact description of the Service you are requisitioning. If you need more than 60 alphanumeric characters to fully describe your item, additional text may be inputted in the “Requisition Line Notes” section.

iii) Miscellaneous

Miscellaneous items are found in the “Misc Type” field. If you are requisitioning a miscellaneous item, leave the “Item” section blank and TAB to the “Misc Type” field. This field is accessible only when the “Item” field is left blank, and a miscellaneous charge is being entered when the Line Type is "M". If requisitioning a Misc Type item, click the Lookup button and select the appropriate miscellaneous item type. If you do not see exactly the miscellaneous item, you need to select “Miscellaneous – Other” (MISC). The descriptions in this listing are fairly generic but once you have selected an item you can add to or change the description section (up to 60 alphanumeric characters) to reflect more accurately the exact description of the item you are requisitioning. If you need more than 60 alphanumeric characters to fully describe your item, additional text may be inputted in the “Requisition Line Notes” section. Below image shows all the options available under “Misc Type” field, additional items related to subcontractor were added.



Charge Type	Description	Taxable
FRGT	Freight Cost	N
FRGT3W	Freight Cost - 3 Way	N
LEASE	Property Lease	N
MISC	Misc. Type	N
OFFSET	Accounting Offset	N
PP	Prepayment	N
SUBEX	Subcontractor Expense	N
SUBKEX	Subcontractor Expense	N
SUBKLA	Subcontractor Labor	N
SUBLA	Subcontractor Labor	N
TAX	Taxes	N
TXAF15	Afghanistan Rent 15%	N
TXAF2	Afghanistan With Cert 2%	N
TXAF7	Afghanistan No Certs 7%	N

b) Populate “Description” field as required, specifically if the item you are selecting is a Good, Service, or miscellaneous (Parts have a default description that is auto populated)

c) Populate “Requisition Line Notes” field with any notes that you wish to be displayed both to the Buyer and on the purchase order to the vendor.

d) Populate the “Quantity” field with the estimated quantity required.

e) Populate “Req U/M” field with the proper Unit of Measure. For this field, you need to select from a predetermined list by clicking the Lookup   button and selecting the appropriate Unit of Measure.

f) Populate “Est Unit Cost Amt” field with the estimated cost per unit of the item you are requesting.

g) Populate “Requested Date” field with the date you need the item delivered/started by

h) Populate “Vendor Part” field with the vendor part number if known.

i) Populate “Manufacturer Part” field with the manufacturer part number if known.

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j) Populate the "Ship ID" field if it has not been auto populated from the "Header" screen. You may do this by clicking the Lookup button and selecting the appropriate ShipTo ID and address.

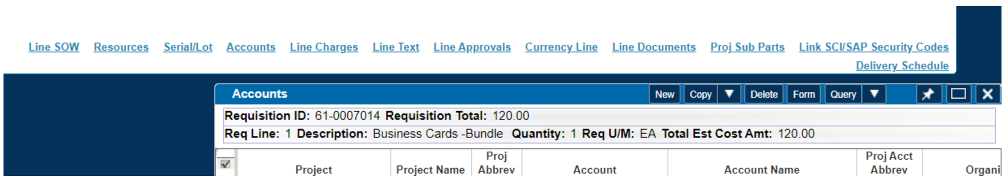
k) Populate "Deliver To" field if this has not been auto populated from the "Header" screen.

l) Populate "Line Notes" field with any detail specifications for the item you are requesting.

m) Populate "Internal Notes" field with any comments for the Buyer that will not be displayed on the purchase order to the vendor.

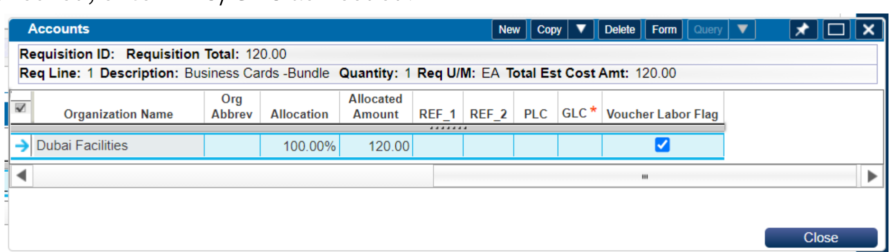
3) You are now finished entering the line item. If you need to add more line items to this requisition, click on the New Line button on the Toolbar. A new line will appear. Select all applicable data as you tab through the line-item sections. *Don't forget to add a line item for any shipping/freight charges - if applicable.*

4) If you need to update Project/Account IDs on the requisition line level, click Account. Account lookup window will appear, and you can remove the Project or Account IDs and replace with the appropriate Project or General Ledger Account IDs for the requisition to be charged.



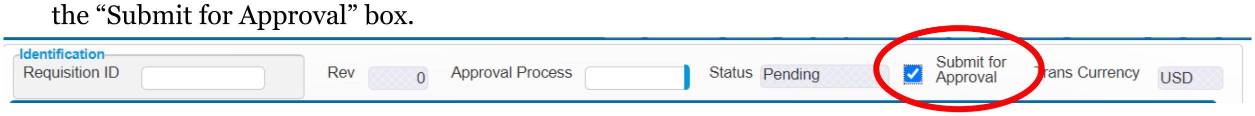
a) If Unanet Flag is checked on the requisition header level, if the request is for ONLY MISC Type (SUBKLA, SUBKEX or SUBKOD), Voucher Labor Flag will appear on the PR Line Account.

i) If checked, enter PLC/GLC as needed.

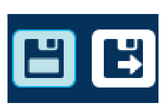


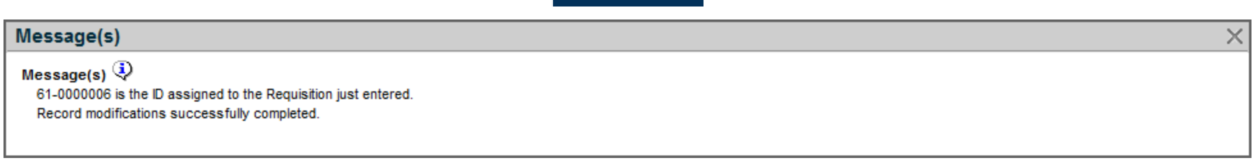
5) When all line items for this requisition have been entered (including a line item for shipping charges if applicable) click the Save and Continue button on the Toolbar at the top of the page.

6) A warning message will appear indicating the requisition/line will remain at a Pending status unless the "Submit for Approval" option is selected. Navigate to the top of the Requisition form and check the "Submit for Approval" box.



After the "Submit for Approval" box is checked, click the Save or Save and Continue button on the Toolbar. A message box will appear indicating the Requisition ID that has been assigned to the requisition.





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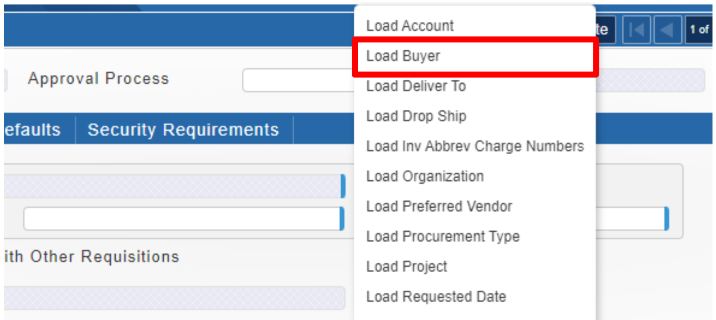
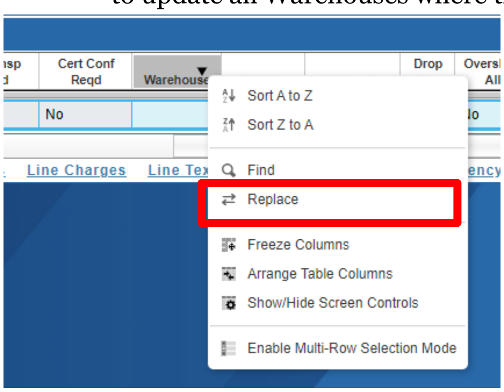
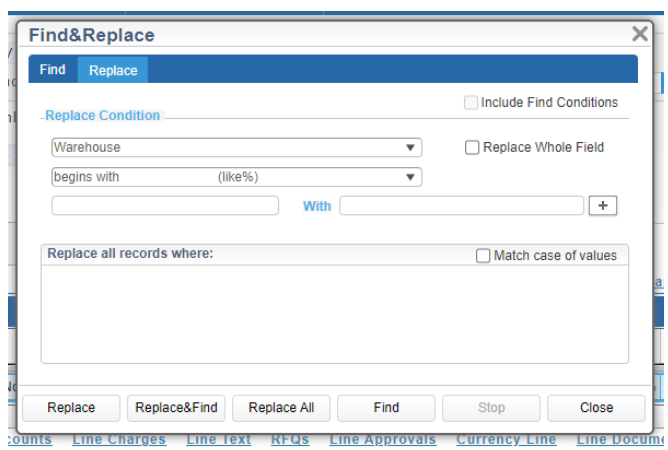
Important Tips When Creating a Purchase Requisition

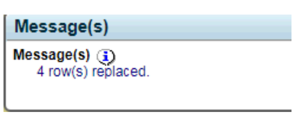
1. In the Manage Purchase Requisition Screen, if you have entered incorrect default header information, and have already entered lines on your Purchase Requisition, by updating the header information, your lines will not update, and the default information will only update new lines created.
    a. To resolve this, right next to any field, and select ‘Load’ followed by the field name that you would like to update. This will load the field information to all the requisition lines. As an example, the buyer, however, you can do this for any field.



2. If there is a field, that does not exist in the Requisition Defaults Section, that you need to update, you can utilize the option of ‘Replace’ to update that field with a certain parameter. To do this, right click on any field and click ‘Replace’, this should allow you to replace the field based on a criterion selected.
    a. The potential criteria you could select could be the standard contains, equals, ends with, begins with, however, you also have the capability to fill out blank fields or conduct a mass update on multiple lines where the fields are not blank. As an example, I would like to update all Warehouses where the field is blank with a certain Warehouse ID.







3. When reviewing Approvers, navigate to Hrd Approvals subtask, a new widnow will appear, where all the approver details are listed.

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Hrd approval subtask includes Approval titels under “Approval Title”, as well as primary/secondary approvers under “Approver List”. Also, Hrd Approvals screen lists approval details (if PR is approved/rejected), Employee Name by displaying who approved the PR from Approver List if it includes Primary Approvers/Secondary Approvers.

Hdr Approvals New Copy Delete Form

Requisition ID: U72700133 **Requisition Total:** 2,500.00

Sequence	Approval Title*	Approver List	Approval Code	Action Date/Time	Rejection Reason*	Rejection Description	User	Employee*	Employee Name	Phone	Ext	Approval Type	Project Validation	QC Appro
1	61-BUSOPS0015	Ash, Gilberto (P); Taylor, Claudia I (S)	A	02/15/2021 08:21:12 AM			591322	61591322	Ash, Gilberto			B	N	N
2	61-PGMLEAD0015	Carlo, Kevin (P); Smith, Kenneth (P); Knep	A	02/15/2021 01:58:54 PM			KNEPPER	61575084	Knepper, Robert			B	N	N
3	61-PGMMGR0015	Knepper, Robert (P); Flores, Alvaro (S)	A	02/15/2021 01:59:41 PM			KNEPPER	61575084	Knepper, Robert			B	N	N

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Revisions

V	Date	Author(s)	Title	Notes
1	1/16/2018	Hussein Akberali	POC/Link Updates, Section Addition	Updated Point of Contact Info and Links, as well as added a section on Tips when creating a Requisition
2	07/15/2018	Hussein Akberali	Procurement Type Required Field VPConnect	Added section to explain the Procurement Type being a Required Field
3	02/18/2020	Malika Narzullaeva	Additional details on "Misc Type" Field	Added information on "Misc Type" as additional types related to Subcontractor were added
4	06/28/2020	Malika Narzullaeva	Additional details on "Date" Fields, Ship ID and Account Information	Added information and explanation on all "Date" fields. Details on Ship ID requests and Account Information.
5	08/02/2021	Malika Narzullaeva	Added details on new Costpoint Validations and Screen Updates	Added information on Unanet Flag, Account hyperlink of the PR item level and Hrd Approvals.
6	08/31/2022	Malika Narzullaeva	Branding update and Screenshot update	Updated to Amentum branding and Costpoint System updates for requisitioner suffix
7	07/01/2024	Candace Smith	Logo Change and screenshot updates	Costpoint 8.2 updated screen shots.

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8	03/12/2025	Candace Smith / Malika Salimova	Logo, branding and policy reference	Updated Logo and Branding information. Added details on GSCM and OnBase ticket requests. Added UpToDate policy reference for SCM-715-1A.

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