

Deltek Costpoint® 7.1.1

Release Notes: Organization Security- Procurement Planning

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Overview

Welcome to Deltek Costpoint 7.1.1 Release Notes. These release notes contain a summary of new enhancements available in this release.

The Organizational Security feature enhances the secure functionality of Costpoint by warranting proper user access throughout the Procurement Planning module. This feature ensures that correct organizational security is applied when a user enters an inventory abbreviation in which the linked project and/or organization are not authorized for the logged-in user/ID.

System JAR Requirements

These enhancements require the following:

- Costpoint 7.1.1 System JAR 038 (cp711_sys_038.zip)

Application JAR Requirements

The following table lists the Costpoint 7.1.1 screens affected by this update. It includes the required JAR version for each application, if applicable.

Domain	Module	Application Name	Application ID	Application File
Materials	PP	Manage Simple Purchase Requisitions	PPMQREQ	cp711_cmplib_PPMENTRQ_013.zip cp711_ppmqreq_013.zip
Materials	PP	Manage Purchase Requisitions	PPMNTRQ1	cp711_cmplib_PPMENTRQ_013.zip
Materials	PP	Apply PO Info to Purchase Requisitions	PPMNTRQ2	cp711_cmplib_PPMENTRQ_013.zip
Materials	PP	Apply PO Info to Purchase Requisitions by Line	PPMRQLN	cp711_cmplib_PPMENTRQ_013.zip cp711_ppmrqln_021.zip
Materials	PP	Approve Purchase Requisitions	PPMRQAPX	cp711_ppmrqapx_016.zip
Materials	PP	Approve Purchase Requisition Lines	PPMRQAPL	cp711_ppmrqapl_012.zip
Materials	PP	Print Purchase	PPRPRRQ	cp711_pprprrq_006.zip

Domain	Module	Application Name	Application ID	Application File
		Requisitions		
Materials	PP	View Purchase Requisition Status	PPQRQSTS	cp711_ppqrqsts_011.zip
Materials	PP	Assign Purchase Requisition Lines to Buyers	PPMBUYAL	cp711_ppmbuyal_008.zip
Materials	PP	Assign Purchase Requisitions to Buyers	PPMBUYAS	cp711_ppmbuyas_009.zip
Materials	PP	Print Purchase Requisition Approval Status Report	PPRAPPR	cp711_pprapppr_003.zip
Materials	PP	Print Purchase Requisition Commitment Report	PPRCOMT	cp711_pprcomt_003.zip

Materials Domain

This section includes summaries of changes made in relation with the Organization Security feature within the Costpoint Materials domain.

Manage Simple Purchase Requisitions (PPMQREQ)

The following are the changes to this screen:

- **Data Entry**
 - User access validation has been modified so that if you enter new data with a requisition type that is linked to projects with an owning organization and/or to organizations that are not authorized for the user ID, Costpoint displays an error message.
 - User access validation has been modified so that if you enter new data with a requisitioner's organization that is not authorized for the user ID, Costpoint displays an error message.
 - User access validation has been modified so that if you link a project (on the Charge Numbers subtask) with a Project's Owning Org (PROJ. ORG_ID), and this is not authorized for the user ID and/or an organization, Costpoint displays an error message.
- **Find/Query** – Costpoint now filters records based on your organization rights for the requisitioner's organization at the header. However, Costpoint displays all requisition lines whether or not the user ID logged in has rights to projects' owning organizations and organizations at the account distribution level linked to the requisition line. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.
- **Update**
 - User access validation has been modified so that if you enter a requisitioner's organization that is not authorized for the user ID, Costpoint displays an error message.
 - User access validation has been modified so that if you link a project (on the Charge Numbers subtask - Project's Owning Org (PROJ. ORG_ID)) and/or an organization that is not authorized for the user ID, Costpoint displays an error message.
- **Lookup**
 - **Requisition Type** – Costpoint now filters and only displays requisition types that are linked to projects with owning organizations that are authorized for the logged-in user ID.
 - **Organization** – Costpoint now filters and only displays organizations that are authorized for the logged-in user ID.
 - **Project** – Costpoint now filters and only displays projects with owning organizations that are authorized for the logged-in user ID.

Manage Purchase Requisitions (PPMNTRQ1)

The following are the changes to this screen:

- **Data Entry**
 - If you enabled organization security in the system setting, and the screen is activated for organization security, Costpoint will not allow you to add, change, or delete a requisition if your user ID does not have 'Full rights to the requisitioner's org ID in the user security group's security profile.

On new purchase requisitions, if you enter a requisitioner's org, project (on the Accounting Defaults tab - Project's Owning Org (PROJ. ORG_ID)), and organization (in the Accounting Defaults tab) not authorized for the user ID, Costpoint displays an error message. In addition, if you link a project (on the Accounts subtask - Project's Owning Org (PROJ. ORG_ID)) and an organization (on the Accounts subtask) that are not authorized for the user ID, Costpoint displays an error message.
 - If approval process is required – If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the requisitioner's org ID.
 - If all the users for the approval titles in the approval process are authorized for the requisitioner's org ID, the changes will be saved.
 - If none of the users for any of the approval titles in the approval process are authorized for the requisitioner's org ID, Costpoint will display an error message.
 - If at least one of the users for the approval titles in the approval process is authorized for the requisitioner's org ID, Costpoint will display a warning message that not all of the approvers are authorized for the requisitioner's org ID and changes will still be saved.
 - Find/Query – Costpoint now filters records based on your organization rights for the requisitioner's organization at the header. However, Costpoint displays all requisition lines, whether or not the logged-in user ID has rights to projects' owning organizations and organizations at the account distribution level linked to the requisition line. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.
- **Update**
 - Costpoint now displays an error message if you update one of the following and your logged-in user ID is not authorized to do so:
 - Requisitioner's Org
 - Project (on the Accounting Defaults tab - Project's Owning Org)
 - Organization (on the Accounting Defaults tab)
 - Project (on the Accounts subtask - Project's Owning Org)
 - Organization (on the Accounts subtask)
 - If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the requisitioner's organization ID.
 - Buyer Assignment – Costpoint requires the buyer to be authorized for the requisitioner's organization ID.
- **Lookup**
 - Organization – Costpoint now filters and only displays organizations that are authorized for the logged-in user ID.

- Project – Costpoint now filters and only displays projects with owning organizations that are authorized for the logged-in user ID.

Apply PO Info to Purchase Requisitions (PPMNTRQ2)

The following are the changes to this screen:

- Data Entry
 - If you enabled organization security in the system setting, and the screen is activated for organization security, Costpoint will not allow you to add, change, or delete a requisition if your user ID does not have 'Full rights to the requisitioner's org ID in the user security group's security profile.

On new purchase requisitions, if you enter a requisitioner's org, project (on the Accounting Defaults tab - Project's Owing Org (PROJ. ORG_ID)), and organization (in the Accounting Defaults tab) not authorized for the user ID, Costpoint displays an error message. In addition, if you link a project (on the Accounts subtask - Project's Owing Org (PROJ. ORG_ID)) and an organization (on the Accounts subtask) that are not authorized for the user ID, Costpoint displays an error message.
 - If approval process is required – If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the requisitioner's org ID.
 - If all the users for the approval titles in the approval process are authorized for the requisitioner's org ID, the changes will be saved.
 - If none of the users for any of the approval titles in the approval process are authorized for the requisitioner's org ID, Costpoint will display an error message.
 - If at least one of the users for the approval titles in the approval process is authorized for the requisitioner's org ID, Costpoint will display a warning message that not all of the approvers are authorized for the requisitioner's org ID and changes will still be saved.
 - Find/Query – Costpoint now filters records based on your organization rights for the requisitioner's organization at the header. However, Costpoint displays all requisition lines, whether or not the logged-in user ID has rights to projects' owning organizations and organizations at the account distribution level linked to the requisition line. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.
- Update
 - Costpoint now displays an error message if you update one of the following and your logged-in user ID is not authorized to do so:
 - Requisitioner's Org
 - Project (on the Accounting Defaults tab - Project's Owing Org)
 - Organization (on the Accounting Defaults tab)
 - Project (on the Accounts subtask - Project's Owing Org)
 - Organization (on the Accounts subtask)
 - If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the requisitioner's organization ID.

- Buyer Assignment – Costpoint requires the buyer to be authorized for the requisitioner's organization ID.
- Lookup
 - Organization – Costpoint now filters and only displays organizations that are authorized for the logged-in user ID.

Project – Costpoint now filters and only displays projects with owning organizations that are authorized for the logged-in user ID.

Apply PO Info to Purchase Requisitions by Line (PPMRQLN)

The following are the changes to this screen:

- Find/Query – Costpoint now filters records based on your organization rights for the Requisitioner's Org at the header. However, Costpoint displays all requisition lines, regardless of rights to projects and organization rights at the account distribution level. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.
- Update
 - Costpoint now displays an error message if you update either the project (on the Accounts subtask - Project's Owning Org) or organization (in the Accounts subtask) where the user ID is not authorized.
 - If you add an approval process/approval title, at least one of the approval title users must be authorized for the requisitioner's organization ID.
 - If all the users for the approval titles in the approval process are authorized for the requisitioner's org ID, the changes will be saved.
 - If none of the users for the approval titles in the approval process are authorized for the requisitioner's org ID, Costpoint will display an error message.
 - If at least one of the users for the approval titles in the approval process is authorized for the requisitioner's org ID, Costpoint will display a warning message that not all of the approvers are authorized for the requisitioner's org ID.
- Buyer Assignment – Costpoint requires this to be authorized for the requisitioner's organization ID.
- Lookup
 - Organization – Costpoint now filters and only displays organizations that are authorized for the user ID.
 - Project – Costpoint now filters and only displays projects with owning organizations that are authorized for the user ID.

Approve Purchase Requisitions (PPMRQAPX)

The following are the changes to this screen:

- Find/Query – Costpoint now filters records based on your organization rights for the Requisitioner's Org at the header. However, Costpoint displays all requisition lines, regardless of rights to projects and organization rights at the account distribution level. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.

- Update
 - If you add an approval process/approval title, at least one of the approval title users must be authorized for the requisitioner's organization ID.
 - If all the users for the approval titles in the approval process are authorized for the requisitioner's org ID, the changes will be saved.
 - If none of the users for the approval titles in the approval process are authorized for the requisitioner's org ID, Costpoint will display an error message.
 - If at least one of the users for the approval titles in the approval process is authorized for the requisitioner's org ID, Costpoint will display a warning message that not all of the approvers are authorized for the requisitioner's org ID.

Approve Purchase Requisition Lines (PPMRQAPL)

The following are the changes to this screen:

- Find/Query – Costpoint now filters records based on your organization rights for the project/organization at the header. However, Costpoint displays all requisition lines, regardless of rights to projects and organization rights at the account distribution level. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.
- Update
 - If you add an approval process/approval title, at least one of the approval title users must be authorized for the requisitioner's organization ID.
 - If all the users for the approval titles in the approval process are authorized for the requisitioner's org ID, the changes will be saved.
 - If none of the users for the approval titles in the approval process are authorized for the requisitioner's org ID, Costpoint will display an error message.
 - If at least one of the users for the approval titles in the approval process is authorized for the requisitioner's org ID, Costpoint will display a warning message that not all of the approvers are authorized for the requisitioner's org ID.

Print Purchase Requisitions (PPRPRRQ)

The following are the changes to this screen:

- Print
 - Costpoint displays an error message if you select and print a specific requisition and you do not have full rights to the requisitioner's organization linked to it.
 - Costpoint displays an error message if you select a specific requisitioner organization that you do not have full rights to.
- Report – Costpoint also suppresses all line information for the requisition, and prints the following message on the report: "Requisition not printed. Your user ID is not authorized for the Requisitioner's Org on this requisition."

Costpoint will not update the Printed Flag for the requisition that has suppressed data and will consider it as not printed.

View Purchase Requisition Status (PPQRQSTS)

Costpoint now filters records based on your organization rights for the requisitioner's organization at the header. However, Costpoint displays all requisition lines, whether or not the logged-in user ID has rights to projects' owning organizations and organizations at the account distribution level linked to the requisition line. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.

Assign Purchase Requisition Lines to Buyers (PPMBUYAL)

Costpoint now filters records based on your organization rights for the project/organization at the header. However, Costpoint displays all requisition lines, whether or not the user logged-in ID has rights to projects' owning orgs and organizations at the account distribution level linked to the requisition line. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.

Costpoint will validate and display an error message if the user ID(s) linked to the Buyer's Employee ID is not authorized for the requisitioner's organization at the header.

Assign Purchase Requisitions to Buyers (PPMBUYAS)

Costpoint now filters records based on your organization rights for the project/organization at the header. However, Costpoint displays all requisition lines, whether or not the logged-in user ID has rights to projects' owning orgs and organizations at the account distribution level linked to the requisition line. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.

Costpoint will validate and display an error message if the user ID(s) linked to the Buyer's Employee ID is not authorized for the requisitioner's organization at the header.

Print Purchase Requisition Approval Status Report (PPRAPPR)

Costpoint displays an error message if you select and print a specific requisition and you do not have full rights to the requisition organization linked to it.

Costpoint also suppresses all line information for the requisition, and prints the following message on the report: "Requisition not printed. Your user ID is not authorized for the Requisitioner's Org on this requisition."

Print Purchase Requisition Commitment (PPRCOMT)

Costpoint displays an error message if you select and print a specific requisition and you do not have full rights to the requisition organization linked to it.

Costpoint also suppresses all line information for the requisition, and prints the following message on the report: "Requisition not printed. Your user ID is not authorized for the Requisitioner's Org on this requisition."

The report will still include the total amounts for the report, including amounts from those requisitions that were suppressed.

Appendix A: For Additional Information

Deltek Support Center

The Deltek Support Center is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online



For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.



If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

A blue geometric graphic consisting of several overlapping triangles and polygons, located in the top-left corner of the page.

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