

Deltek Costpoint® 7.1.1

Organization Security: System Setup and
Use Case Scenario for Production
Control Module

November 28, 2018

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This edition published November 2018.

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Overview

The Organization Security feature enhances the secure functionality of Costpoint by warranting proper user access throughout the Materials domain. This feature ensures that correct user access is applied to the logged-in user ID in accessing records/transactions by validating and filtering records/transactions as authorized for the user ID. Prior to this enhancement, only the logged-in user ID is validated against the manufacturing order planner organization ID. With this new feature, on data entry, the system now validates all the inventory abbreviation, and projects and organizations (header and line section, including the subtasks) against the planner, material handler, operator, inspector, buyer, and logged-in user ID. The system also filters the records being displayed and printed on the inquiry and report applications.

Objective

The purpose of this document is:

- To provide quick and functional setup guidelines about the Organization Security feature to both internal and external customers.
- To give a high-level overview of how the organizational security applies to the Production Control (PC) module and the changes made to the PC applications.

Organization Security System Setup

Use screens in the Organization Security application group to establish organization security settings, including activating organization security by module and managing organization security profiles and groups. You must perform the system setup as they appear in the sequence presented.

Configure System Settings (SYMSETNG)

On the Configure System Settings (SYMSETNG) screen, select the **Apply Organization Security** check box. This is the organization security master flag.

Note: If the **Apply Org Security** check box is not selected, then organization security will not be applied in Costpoint even when the **Apply Org Security** check box is selected by module and/or application on the Activate/Inactivate Organization Security by Module (SYMORGFN) screen.

If the **Apply Organization Security** check box is selected, then the **Apply Org Security for Employees without User ID, checkbox** is also selected by default and system will validate the employee ID(s) access rights against the Organization related fields (Project, Inventory Abbrevs, and Organization). This is applicable for Materials Management apps only.

Activate/Inactivate Organization Security by Module (SYMORGFN)

On the Activate/Inactive Organization Security by Module (SYMORGFN) screen, select the modules and applications for which you want to enable/disable organization security by selecting the **Apply Org Security** check box next to each of the modules (Modules setting table) and applications (Applications setting table).

Organization Security System Setup

Browse Applications > Admin > Security > Organizational Security > **Activate/Inactivate Organization Security by Module**

Module	Module Name	Apply Org Security	Domain
IN	Inventory	<input type="checkbox"/>	Materials
MR	Material Requirements Planning	<input type="checkbox"/>	Materials
PC	Production Control	<input checked="" type="checkbox"/>	Materials
PO	Purchasing	<input checked="" type="checkbox"/>	Materials
PP	Procurement Planning	<input checked="" type="checkbox"/>	Materials
RC	Receiving	<input type="checkbox"/>	Materials
DB	Dashboards	<input checked="" type="checkbox"/>	Reports & Analytics

Application	Application Name	Apply Org Security
PPMQREQ	Manage Simple Purchase Requisitions	<input checked="" type="checkbox"/>
PPMRQAPL	Approve Purchase Requisition Lines	<input checked="" type="checkbox"/>
PPMRQAPX	Approve Purchase Requisitions	<input checked="" type="checkbox"/>
PPMRQLN	Apply PO Info to Purchase Requisitions by Line	<input checked="" type="checkbox"/>
PPPGPO	Create Purchase Orders	<input checked="" type="checkbox"/>
PPQRQSTS	View Purchase Requisition Status	<input checked="" type="checkbox"/>
PPRAPPR	Print Purchase Requisition Approval Status Report	<input checked="" type="checkbox"/>
PPRCOMT	Print Purchase Requisition Commitment Report	<input checked="" type="checkbox"/>
PPRPRRQ	Print Purchase Requisitions	<input checked="" type="checkbox"/>

Manage Organization Security Profiles (SYMORPRF)

On the Manage Organization Security Profiles (SYMORPRF) screen, create an organization security profile, and select **Apply Org Security**.

Note: Selecting this check box grants profiles full rights to organizations. If you clear this check box, you do not need to enter anything into the Assign Organizations to Profile table window.

FILE LINE OPTIONS PROCESS HELP Company 1 (test 1 123151241515151 - C71MQCM16) Deltek Costpoint

Browse Applications > Admin > Security > Organizational Security > Manage Organization Security Profiles

Organization Security Profile New Copy Delete 1 of 72 Existing Table Query

Profile ID * 1-ALL Name * All Org 1's

Apply Org Security Rights Application Method
 Inclusive Exclusive Both

Organization *	Organization Name	Relation *	Rights *
1	SuperTech, Inc.	Begins With	Full

Rights Application Method

Select the rights application method for the profile.

If you select **Inclusive**, your profile ID is granted full rights to the organizations displayed in the Assign Organizations to Profile table window.

Organization Security System Setup

Organization Security Profile

Profile ID *	Profile Name *	Apply Org Security	Rights Application Method *
PROP2	ORG SEC	<input checked="" type="checkbox"/>	Inclusive
PROP5	ORG SEC	<input checked="" type="checkbox"/>	Inclusive
QA-001	Org Security for 1.3.310	<input checked="" type="checkbox"/>	Inclusive
RBDSEC	RBD ORG SEC PROFILE	<input checked="" type="checkbox"/>	Inclusive
RBDSP	SECURITY PROFILE FOR RBD	<input type="checkbox"/>	Inclusive

Assign Organizations to Profile

Organization *	Organization Name	Relation *	Rights *
1	--SuperTech, Inc. 711ro	Begins With	Full
2	MWM Top Level	Begins With	Full
4	AJs Org Structure	Begins With	Full

NOTE: Organization IDs listed here are the ones the user has rights to. Organization IDs NOT listed here are "Inaccessible"

If you select **Exclusive**, your profile ID is granted full rights to the organizations not listed in the Assign Organizations to Profile table window.

Organization Security Profile

Profile ID *	Profile Name *	Apply Org Security	Rights Application Method *
QCPRO1	QC Org Sec Profile 1	<input checked="" type="checkbox"/>	Both
RBDSEC	RBD ORG SEC PROFILE	<input checked="" type="checkbox"/>	Inclusive
RBDSP	SECURITY PROFILE FOR RBD	<input checked="" type="checkbox"/>	Inclusive
REQS	Req Org Security Test	<input checked="" type="checkbox"/>	Exclusive
RJST	ROZ ORG SEC PROFILE	<input checked="" type="checkbox"/>	Both

Assign Organizations to Profile

Organization *	Organization Name	Relation *	Rights *
1.2.200	Product Development	Equals	None
F	FIN STMT TEST ORG.....25	Begins With	None
Z	FIN STMT TEST ORG.....25	Begins With	None

NOTE: Organization IDs listed here are the ones that the users CANNOT HAVE access to. Organization IDs NOT listed here are "accessible"

If you select **Both**, Costpoint displays all organizations to which this profile is associated to in the Assign Organizations to Profile table window; then, you can grant or deny access to certain organization IDs for a profile. This is useful if you want to provide access to most, but not all, branches of a particular organization tree.

Organization Security Profile

Profile ID *	Profile Name *	Apply Org Security	Rights Application Method *
1-ALL	All Org 1's	<input checked="" type="checkbox"/>	Both
1-MIX	Mix of 1's	<input checked="" type="checkbox"/>	Both
1-MIX2	Mix of 1's - TEST 2	<input checked="" type="checkbox"/>	Both
AD003	AD003	<input checked="" type="checkbox"/>	Both
AMSEC	amsec	<input checked="" type="checkbox"/>	Both

Assign Organizations to Profile

Organization *	Organization Name	Relation *	Rights *
1	--SuperTech, Inc. 711ro	Equals	None
1.2.210	Field Operations	Equals	None
1.2.220	Testing & Evaluation	Equals	None
1.3.320	Design & Development	Equals	None
9	Smith, Jones & Barney Inc	Begins With	Full
F	FIN STMT TEST ORG.....25	Begins With	None
Z	FIN STMT TEST ORG.....25	Begins With	None

NOTE: This follows the inclusive definition except that the "None" rights can also be used to specify an override to the list of included orgs (to exclude some orgs within wildcard orgs specified for inclusion.) This would be useful for users who wish to provide access to most but not all branches of a particular organizational tree

Note: If the **Apply Org Security** check box is selected, there must be at least one organization ID linked to the organization profile; otherwise, the user profile will have access to all organizations.

Manage Organization Security Groups (SYMORGRP)

On the Manage Organization Security Groups (SYMORGRP) screen, set up organizational groups to which you can assign an organizational security profile to each module.

Organization Security System Setup

Note: You must click the **Assign Profile** button to load the new modules and assign organization security profiles. This populates the Assign Profiles to Modules table window.

The screenshot shows the 'Assign Profiles to Modules' dialog box. The 'Query Condition' is set to 'Module begins with RC'. A yellow callout box contains the text: 'A) the new modules does not exist for this Org Security Group'. The main window displays the 'Organization Security Group' table and the 'Assign Profiles to Modules' table.

Organization Security Group	Name	Organization Security Profile to Assign	Profile Name
100	100 only		
110	110 only		
115	115 No Access		
1JEAN	jean		

Module	Module Description	Organization Security Profile	Profile Name
H5	Compensation	100	110 only
HP	Personnel	100	110 only
HA	Affirmative Action	100	110 only
HK	Deferred Compensation Admin	100	110 only
HB	Benefits	100	110 only
EC	Engineering Change Notices	100	110 only
PP	Procurement Planning	100	110 only
PC	Production Control	100	110 only

Note: For each module, you need to specify an organizational profile ID that was set up on the SYMORPRF screen.

The screenshot shows the 'Assign Profiles to Modules' dialog box. A red box highlights the 'Assign Profiles' button. A yellow callout box contains the text: 'B) To load the new modules, user must click on the 'Assign Profile' pushbutton and assign an org security profile.' The main window displays the 'Assign Profiles to Modules' table with new modules (DB, SM, PO, RC) highlighted in red.

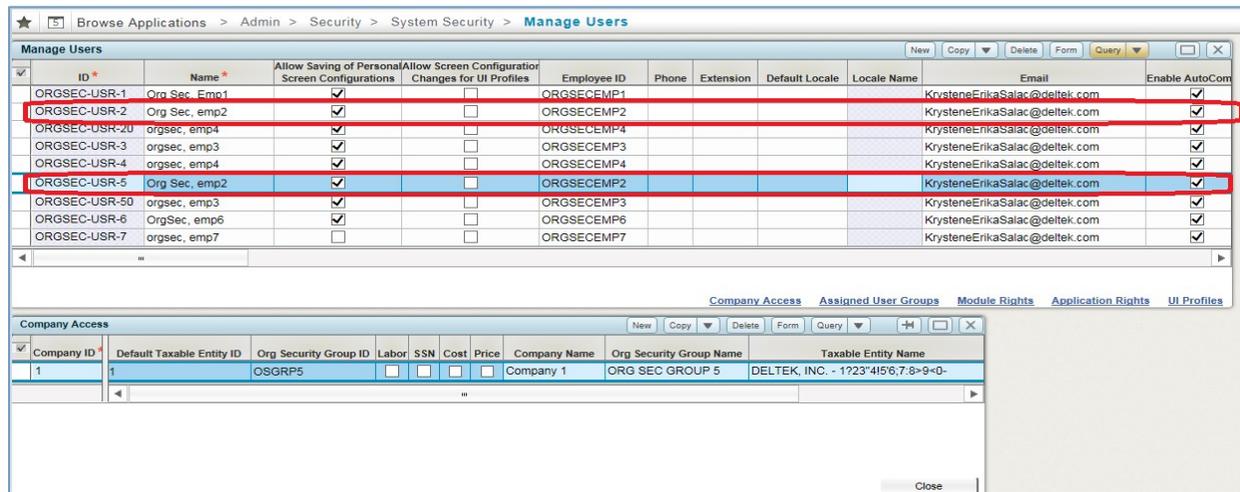
Module	Module Description	Organization Security Profile	Profile Name
H5	Compensation	100	110 only
HP	Personnel	100	110 only
HA	Affirmative Action	100	110 only
HK	Deferred Compensation Admin	100	110 only
DB	Dashboards		
SM	Subcontractor Management		
PO	Purchasing		
RC	Receiving		

Note: If organization security is enabled for a module or application, but it is missing from the list of organization security groups, and there is no organization security profile assigned to it, then the user linked to the organization security group will be denied access to all organizations and will not be able to create/enter new transactions or view transactions.

Manage Users (SYMUSR)

On the Manage Users (SYMUSR) screen, assign an organization security group to users. You can assign an employee ID to multiple Users. In addition, you can also link employees to user IDs from the Manage Employee Information (LDMEINFO) screen.

Note: You must establish at least one organization security group for each company before you can create any user IDs in the Manage Users (SYMUSR) screen. You can assign organization security group on this screen.



Update Organization Security Profiles (SYPORGPF)

On the Update Organization Security Profiles (SYPORGPF) screen, you must run the update either after setting up all organizational profiles or after any time you add an organization or change and/or add a profile. Run this for all profiles when first setting up organization security and when using the range feature for maintenance.



Rebuild Global Settings (SYPSTNG)

On the Rebuild Global Settings (SYPSTNG) screen, restart services without interrupting user activity after changing the settings.

Note: If the logged-in user ID is associated to an Org Security Group/Profile, you need to log out of the system and log back in to affect the changes.

Additional Setup

Manage Employee Information (LDMEINFO)

Use this screen to link employees to user IDs. This screen is also used to assign Home Org IDs that will be defaulted in different transactions.

The screenshot displays the 'Manage Employee Information' interface. At the top, a breadcrumb trail reads: 'Browse Applications > People > Employee > Basic Employee Information > Manage Employee Information'. Below this is a table with the following data:

Employee *	Contractor	Social Security Number *	Status *	Last Name *	First Name *	Middle Name	Suffix	Displayed Name	Current Hire Date *	Birth Date
ORGSECEMP4	<input type="checkbox"/>	123-46-7643	Active	orgsec	emp4			orgsec, emp4	01/01/2014	01/01/1989

Below the table are several tabs: 'Salary Details', 'Leave Beginning Balances', 'Leave', 'Allowances Details', 'Taxes', 'Deductions', 'Contributions', 'Bank Info', 'Savings Bonds', 'User-Defined Info', 'Additional Addresses', 'Citizenship', 'Phone', and 'Additional Default Pay Types'. The 'Salary Details' section is active, showing a 'Clone Recent Record' button and various input fields:

- Effective Date: 01/01/2018
- End Date: 12/31/2078
- Work Hours In Year: 2080
- Hourly Amount: 1,500.0000
- Payroll Salary Amount: 60,000.00
- Annual Amount: 3,120,000.00
- Percent Of Increase: 0.00%
- Employee Class: [Empty]
- Employee Type: Regular
- Rate Type: Hourly
- FLSA Classification: Non-Exempt
- Labor Group: [Empty]
- Labor Location: [Empty]
- Work Schedule: [Empty]
- GLC: 01012
- PLC: [Empty]
- Overtime State: AL
- Time Collection: [Empty]

The 'Home Organization' field is highlighted with a red box and contains the value '5.002'. Other fields include 'HR Organization', 'Detail Job Title' (ACCOUNTANT), 'Security Organization' (5.001), and 'Manager'.

Note: Use the Load Organization IDs (OEPLDORG) screen to populate the required organizations with the associated home organizations where the organization fields are left blank. The utility screens will only populate organizations for the company the user is logged into.

Use Case Scenario Sample Data

The data indicated in the table below has been used to show the validations in Costpoint involving organization security.

Manage Employee INFO (LDMEINFO)			Manage Users (SYMUSR)			Manage Organization Security Groups (SYMORGRP) / Manage Organization Security Profiles (SYMORPRF)						
Home Org	Emp ID	Log IN	Emp ID	User ID	Password	Org Sec Grp ID	Org Sec Profile	Apply Org Sec	Rights App Method	Rights	Relation	Org ID
1.2.200	ASAKA		ASAKA	CPSUPERUSER	CPSUPERUSER	ALL	ALL	Y	Inclusive	Full	Begins With	1
										Full	Begins With	2
				JE22USER	CPSUPERUSER	JEG	JEG	Y	Both	Full	Begins With	1.2
										None	Begins With	1.3
										Full	Begins With	1
										None	Equals	1.1.100
1.2.210	ADEMP005		ADEMP005	AD005	USERAD005	ADB2	ADB2	YES	Both	Full	Equals	1.1.100
										Full	Begins With	1.2
										None	Equals	1.2.200
										Full	Begins With	1.3
										None	Equals	1.3.300
				AD002		ADI	ADI	No	Inclusive			
1.2.200	ASAKA			ADSUPERUSER		ALL	ALL	Y	Inclusive	Full	Begins With	1
										Full	Begins With	2
	AD004			AD004		ADB	ADB	YES	Both	Full	Begins With	4
										Full	Begins With	5
										None	Equals	6
1.2.210	ZM0001		ZM0001	ZM0001		ADC	ADC	YES	Both	Begins With	Full	1
										Begins With	None	1.2.200
										Equals	Full	1.2.210
										Equals	Full	2
									Equals	None	2.008.5.10	
				JEFTEST1		JEFT1	JEFT1	N	Inclusive	Full	Equals	1
				JEFTEST2		JEFT2	JEFT2	Y	Inclusive	Full	Equals	2
				JEFTESTNONE								
				JEFUSER1		JEFPR1	JEFPR1	Y	Inclusive	Full	Equals	1
				JEFUSER2		JEFPR2	JEFPR2	N	Inclusive	Full	Equals	2
			ORGSECEMP4	ORGSEC-USR-4	PASSWORD	OSGRP4	OS-4	Y	Both	Full	Equals	4.100.A00.0010.10
										Full	Equals	4.100.C00
										Full	Equals	4.300.A00
										Full	Equals	5.002
			ADSECO00001	AD1220	USERAD1220	AD1220	AD1220	Y	Inclusive	Full	Equals	1.2.200

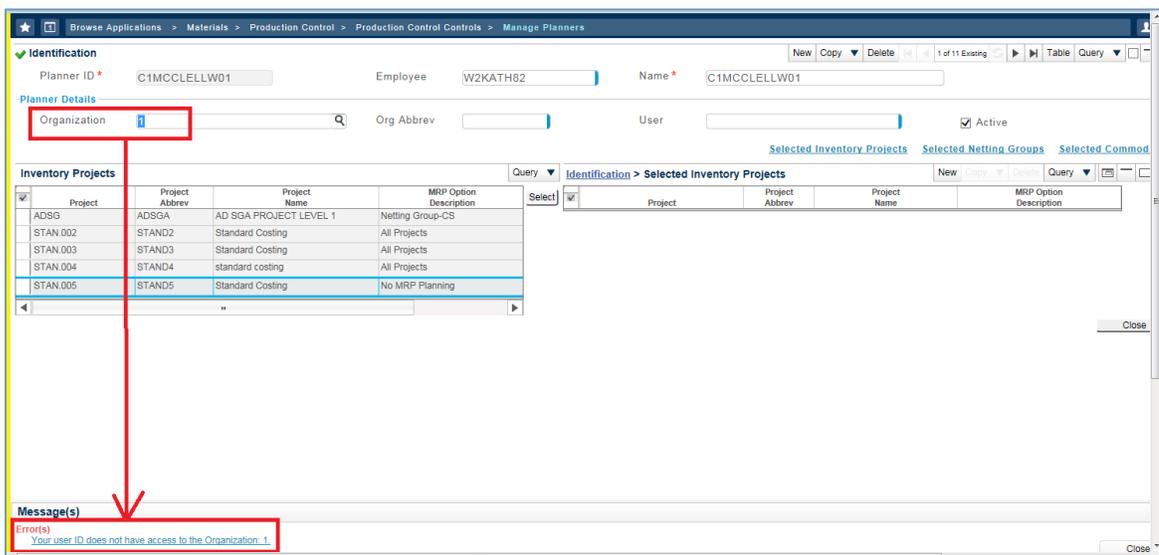
Use Case Scenarios

Note: Prior to this enhancement, Costpoint only validated the logged-in user ID and the planner against the planner's organization ID. Now, the system validates the logged-in user ID, Supervisor and planner used in the transactions against all the owning organization associated to the Project and Orgs linked to the selected inventory abbreviation(s), owning organization for the selected project(s)/organization(s) in the header and line sections, as well as in the subtasks.

Scenario A

This scenario presents the changes in logic made on the Manage Planners (PCMPLNR) screen when organization security is enabled.

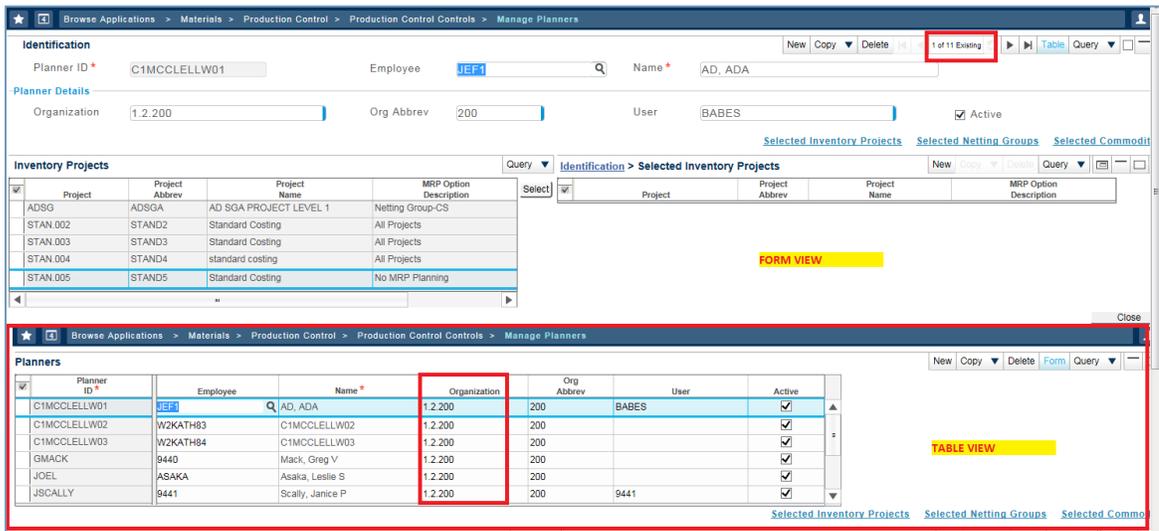
1. Log in as user AD005 and go to the Manage Planners (PCMPLNR) screen.
2. Enter the values for all required fields. Make sure that your logged-in user ID has full rights to the organization used.



Note: The **Organization** field is now a required field when organization security is enabled.

3. Use **Query** to define search parameters for data records maintained by the application. The application will filter records based on the logged-in user ID's access rights to the planner's organization.

Use Case Scenarios

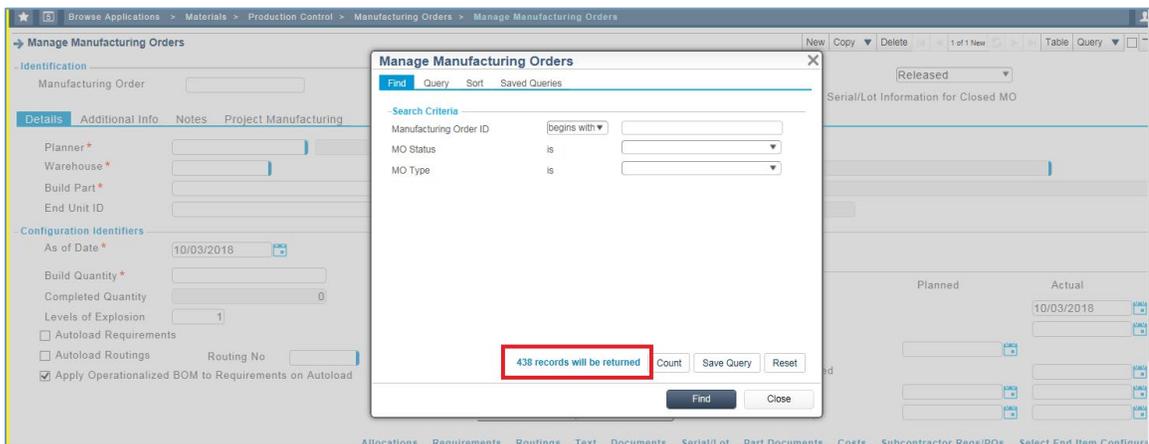


Note: Costpoint displays organizations where your user ID has full rights. In this case, user ID AD1220 only has access to organization 1.2.200.

Scenario B

This scenario presents the changes in logic made on the Manage Manufacturing Orders (PCMMOMNT) screen when organization security is enabled.

1. Log in as user AD005 and go to the Manage Manufacturing Orders (PCMMOMNT) screen.
2. Use **Query** to define search parameters for data records maintained by the application. The application will filter records based on the logged-in user ID's access rights to the planner's organization.



Use Case Scenarios

Manufacturing Order ID	Load from Inv Abbrev Peggings	Order Date	Need Date	Due Date	Completed Date	Planned Release Date	Released Date	Planned In-Shop Date	In-Shop Date	Build Project	Build Project Abbreviation	Build Project Name	Planner Organization	Organization Abbreviation
0322-1	<input type="checkbox"/>	03/22/2017	03/22/2017	03/22/2017		03/22/2017	03/22/2017	03/22/2017		5150.001	51501	3.1A Comercial Catalogs	1P2200	200
0421-001	<input type="checkbox"/>	04/21/2010	08/31/2007	08/31/2007		08/31/2007	08/30/2007	08/31/2007	08/04/2011	1006.001.10	100610	Prototype Design	1.2.200	200
0807	<input checked="" type="checkbox"/>	08/07/2017	08/07/2017	08/07/2017		08/07/2017	08/07/2017	08/07/2017		5150.001	51501	3.1A Comercial Catalogs	1.2.200	200
0908	<input checked="" type="checkbox"/>	09/07/2017	09/08/2017	09/08/2017		09/08/2017	09/07/2017	09/08/2017		5150.001	51501	3.1A Comercial Catalogs	1.2.200	200
0920-1	<input checked="" type="checkbox"/>	09/20/2017	09/20/2017	09/20/2017		09/20/2017	09/20/2017	09/20/2017		5150.001	51501	3.1A Comercial Catalogs	1.2.200	200
092016-1	<input type="checkbox"/>	09/20/2016	09/05/2016	09/05/2016		09/05/2016	09/20/2016	09/05/2016		5150.001	51501	3.1A Comercial Catalogs	1.2.200	200
092216	<input type="checkbox"/>	09/22/2016	09/08/2016	09/08/2016		09/08/2016	09/22/2016	09/08/2016		5150.001	51501	3.1A Comercial Catalogs	1.2.200	200
0926-1	<input checked="" type="checkbox"/>	09/25/2017	09/26/2017	09/26/2017	09/25/2017	09/26/2017	09/25/2017	09/26/2017		5150.001	51501	3.1A Comercial Catalogs	1.2.200	200
1004-1	<input checked="" type="checkbox"/>	10/04/2017	10/04/2017	10/04/2017		10/04/2017	10/04/2017	10/04/2017		5150.001	51501	3.1A Comercial Catalogs	1.2.200	200
1106-1	<input checked="" type="checkbox"/>	11/05/2017	11/06/2017	11/06/2017	11/06/2017	11/06/2017	11/05/2017	11/06/2017		5150.001	51501	3.1A Comercial Catalogs	1.2.200	200
1108MO-01	<input type="checkbox"/>	07/23/2009	11/30/2007	11/30/2007		11/30/2007	01/13/2010	11/30/2007	08/04/2011	5150.001	51501	3.1A Comercial Catalogs	1.2.200	200
1108MO-02	<input type="checkbox"/>	11/08/2007	11/30/2007	11/30/2007		11/30/2007	05/06/2010	11/30/2007	08/04/2011	5150.001	51501	3.1A Comercial Catalogs	1.2.200	200
1108MO-03	<input type="checkbox"/>	11/08/2007	11/30/2007	11/30/2007		11/30/2007	05/06/2010	11/30/2007	08/04/2011	5150.001	51501	3.1A Comercial Catalogs	1.2.200	200
1214-1	<input checked="" type="checkbox"/>	09/14/2017	09/14/2017	09/14/2017	12/14/2017	09/14/2017	12/14/2017	09/14/2017		5150.001	51501	3.1A Comercial Catalogs	1.2.200	200
1214-2	<input checked="" type="checkbox"/>	09/14/2017	09/14/2017	09/14/2017		09/14/2017	12/14/2017	09/14/2017		5150.001	51501	3.1A Comercial Catalogs	1.2.200	200

3. Create a manufacturing order transaction. The system now validates the logged-in user ID and the planner's access rights against all the owning organization associated to the projects and organizations linked to the selected inventory abbreviation(s)/owning organization(s), in both the header and line section, as well in the subtasks.

Build Project: 5150.001 | Build Project Abbrev: 51501 | 3.1A Comercial Catalogs

Planner Organization: [Field]

Order Reference: [Field] | Order Ref Line: [Field] | Order Ref Type: [Field]

Discrepancy ID: [Field] | Discrepancy Line: [Field] | Priority: 7 | Assembly Job:

Yield: 100.00% | Net Build Quantity: 12

Percent Complete: 0.00%

Activity: Allow Additional Material Issues | Material Issues: N
 Allow Additional Timesheet Charges | Timesheet Charges: N
 Allow Additional Subcontractor Charges | Subcontract Charges: N

Document Package: Pick List | Assembly Sheet
 Routing Traveler | Component Labels
 Configuration List

Message(s):
 Error(s): Your user ID does not have access to the Planner's Organization: 4.

Planner: JOEL | Asaka, Leslie S

Warehouse: 5150WHSE | Supervisor: [Field]

Build Part: 100 | Rev: [Field] | Description: 1/4" TEST PLUG

End Unit ID: [Field] | U/M: EA | Part Security: Unrestricted

Configuration Identifiers: As of Date: 10/03/2018 | Configuration: [Field]

Build Quantity: 12 | Completed Quantity: 0

Levels of Explosion: 1

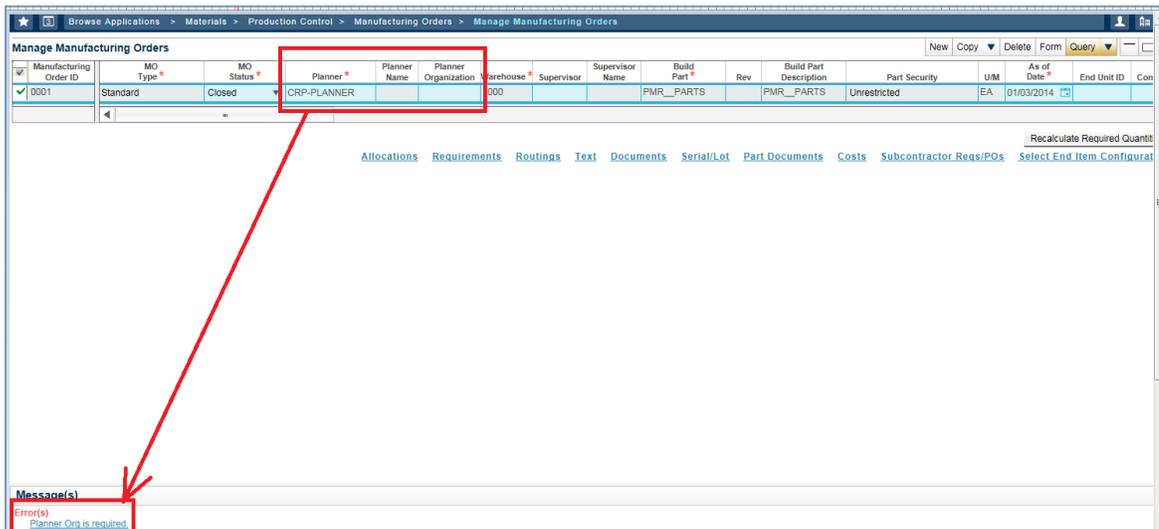
Inventory Abbreviations: Default Build-To*: 51501F | Subassembly*: INV121

Raw Material*: 51501 | Common Stock: (LONGCOMMON)

MO Dates: Order*: 10/03/2018 | Actual: 10/03/2018
 Need*: 01/03/2018 | Due*: 01/03/2018
 Completed: [Field] | Release: 01/03/2018 | 10/03/2018

Message(s):
 Error(s): Your user ID does not have access to the Project's Owning Organization linked to this Inv. Abbrev: INV121.

Use Case Scenarios



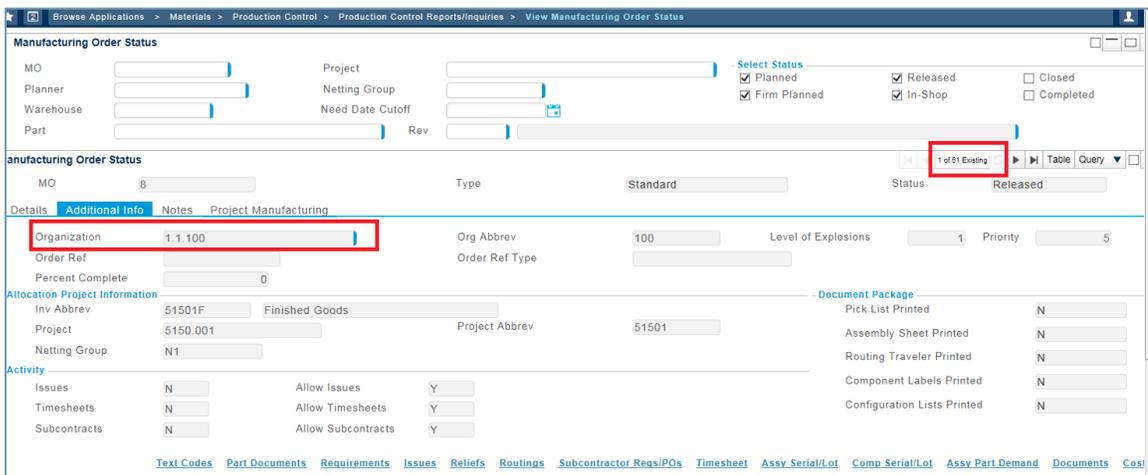
Note: The manufacturing order planner's organization is the reference organization to use when creating issuance, reliefs, operation completions, QC inspections and creating purchase requisitions against the manufacturing orders. Logged-in user must have full rights to the manufacturing order planner's organization to create transactions.

Scenario C

This scenario presents the changes in logic affecting inquiry and reporting applications of the Production Control module. The system now filters records based on the logged-in user ID's rights to the manufacturing order planner's organization ID.

Note: Prior to this enhancement, there were no filters in the manufacturing order (MO) records when users access records.

1. Log in as user AD005 and go to the View Manufacturing Order Status (PCQMOST) screen. The application will filter records based on the logged-in user ID's access rights to the manufacturing order planner's organization ID.



Use Case Scenarios

The screenshot shows the 'Manufacturing Order Status' application interface. At the top, there are search filters for MO, Project, Netting Group, Warehouse, Part, and Rev. Below these are checkboxes for status selection: Planned, Firm Planned, Released, In-Shop, Closed, and Completed. The main part of the screen is a table with the following columns: Manufacturing Order, MO Type, MO Status, Organization, Org Abbrev, Levels of Explosion, Priority, Order Reference, Percent Complete, Order Ref Type, Allocation Inv Abbrev, Allocation Inv Abbrev Name, Pick List Printed, Allocation Proj Abbrev, Allocation Project, Assembly Sheet Printed, and Net Gro. A red box highlights the 'Organization' and 'Org Abbrev' columns for several rows, including those with values like 1.1.100, 1.1.100, 1.3.310, 1.1.100, 1.2.210, 1.2.210, 1.3, 1.2.210, 1.2.210, 1.1.100, 1.1.100, and 1.1.100.

Note: User AD005 only have access to org IDs that (a) is equal to 1.1.100 and (b) begins with 1.2 and 1.3.

- Log in as user AD005 and go to the Print Manufacturing Order Documentation (PCRMODC) screen. The application will filter records based on the manufacturing order planner's organization ID. Details of the MO will be suppressed if the user do not have full access to the MO planner's Organization, and an error message is displayed on the report.

The screenshot shows a 'Manufacturing Order Pick List' report for 'ACA 2017 Foreign Taxable Entity'. The report includes header information such as MO: 031016-1, Part: 105100-1, Rev: A, Description: PWB ASSY, Warehouse: WHSE1, Planner: P1 Basinger, Lisa B, Org: 1.1.100, Release Date: 04/04/16, and Planned Shop Date: 04/28/16. Below this is a table with columns: Line Find, Part/Description Inv Abbrev/Project, Rev, Type/U/M Work Center, To-Issue Qty, Location, Serial/Lot, Exp Date, On-Hand Qty, and Picked Quantity. A red box highlights an error message at the bottom of the table: 'MO Pick List not printed. Your user ID is not authorized for the Planner's Org on this Manufacturing Order.'

Note: Similar changes apply to the following reporting applications: Print MO WIP Variance Analysis Report (PCRWIPV), Print Manufacturing Order Component Shortage Report (PCRSVRT), and Print Manufacturing Order Cost Report (PCRMOCST).

Scenario D

This scenario presents validation of rights of the logged-in user/planner/operator/inspector/material handler used in the transactions and that they must have full rights to all the owning organization associated to the projects and organizations linked to the selected inventory abbreviation(s)/owning organization(s) of the manufacturing order planner organization.

- Log in as user AD1220 and go to the Expedite Manufacturing Orders (PCMMEXPD) screen.
- Use **Query** to define search parameters for data records maintained by the application. The application will filter records based on the MO planner's organization ID.

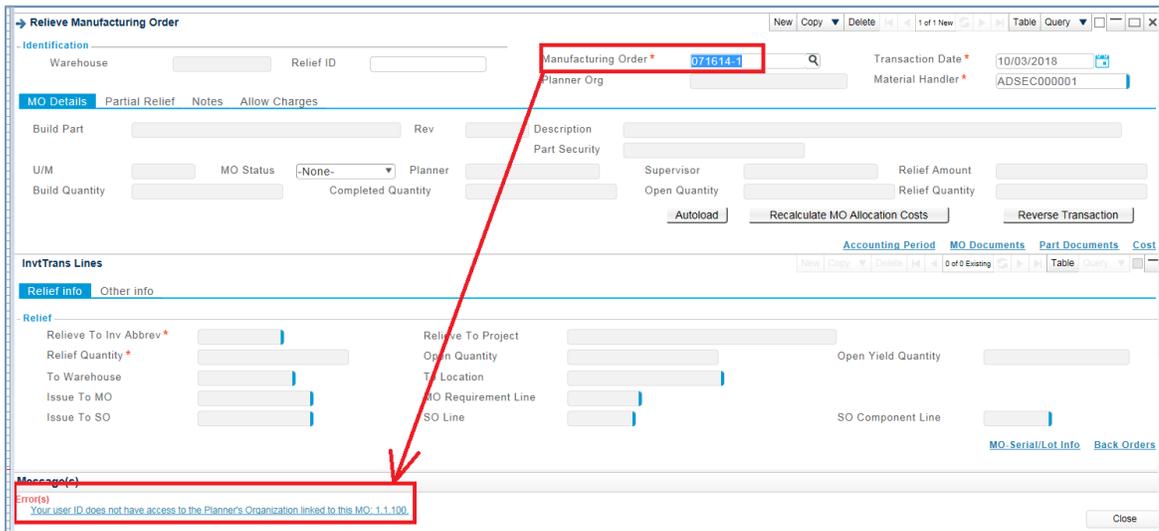
Use Case Scenarios

Note: Similar query functionality applies to all Production Control applications.

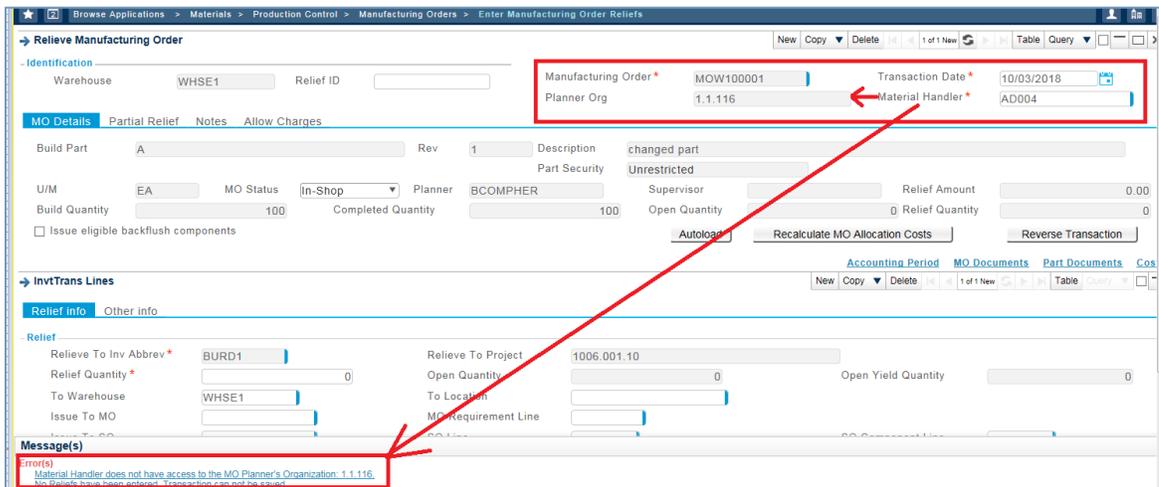
3. Expedite an MO.

4. Go to the Enter Manufacturing Order Reliefs (PCMRELMO) screen and enter an MO that is associated to a planner organization ID where your user ID does not have full rights.

Use Case Scenarios



5. Enter or select an MO that is linked to a planner's organization ID where you have full rights to, and then change the material handler. Make sure that the material handler does not have access to the manufacturing order planner organization. Costpoint displays an error message.

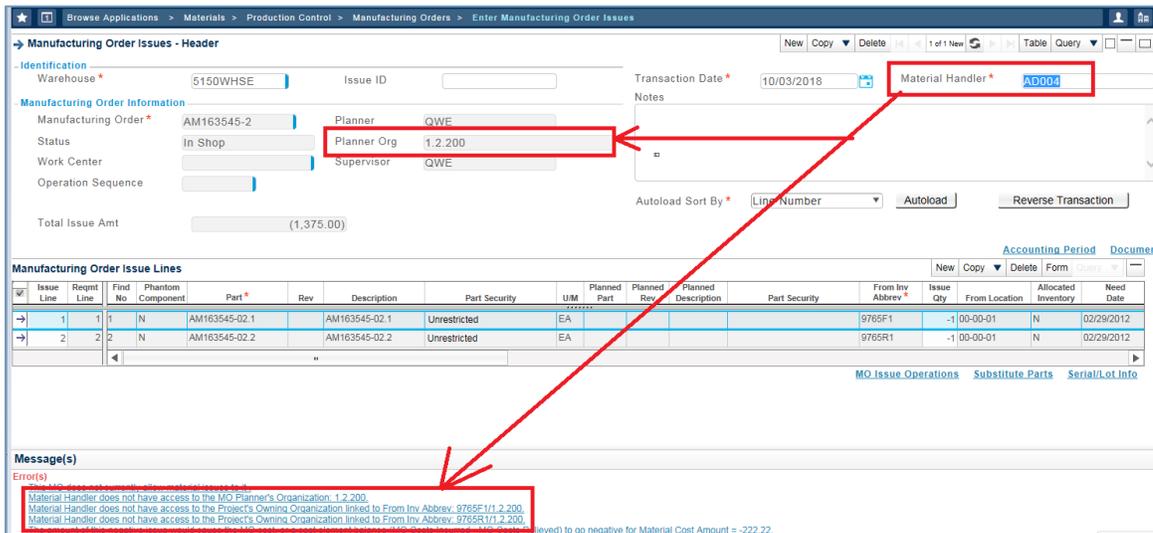


Note: On data entry/new records, the system now validates the MO Planner Org ID against the Material Handler if the **Apply Org Security for Employees without User ID** check box is selected on the Configure System Settings screen.

If the **Apply Org Security for Employees without User ID** check box is not selected on the Configure System Settings screen, and there is no user ID associated to the Requisitioner/ Buyer, then the system will suppress the organization security validations against it.

6. Go to the Enter Manufacturing Order Issues (PCMMOISS) screen and enter an MO that is linked to a planner's organization ID where you have full rights to and change the material handler. Make sure that the material handler does not have access to the manufacturing order planner organization. Costpoint displays an error message.

Use Case Scenarios



Note: A new application ID for the Enter Manufacturing Order Issues screen, INMMOISS, has been created in Inventory (IN) module to differentiate from the Enter Manufacturing Order Issues screen in Production Control (PC) module. This change enables you to assign distinct organization security profiles and user rights to each screen. If you access the Enter MO Issues screen via PCMMOISS and your module rights are under the IN module, you now have to set up user rights and profiles for the Enter MO Issues screen using the INMMOISS application ID. However, license for both screens remain under the PC module.

Note: A new application ID for the Manage Inventory Abbreviation Peggings screen, PCMIAPEG, has been created in Production Control (PC) module to differentiate from the Manage Inventory Abbreviation Peggings screen in Material Requirements Planning (MR) module. This change enables you to assign distinct organization security profiles and user rights to each screen. If you access the Manage Inventory Abbreviation Peggings screen via MRMIAPEG and your module rights are under the MR module, you now have to set up user rights and profiles for the Manage Inventory Abbreviation Peggings screen using the PCMIAPEG application ID. However, license for both screens remain under the MR module.

Note: On data entry/new records, the system now validates the MO Planner Org ID against the Material Handler if the **Apply Org Security for Employees without User ID** check box is selected on the Configure System Settings screen.

If the **Apply Org Security for Employees without User ID** check box is not selected on the Configure System Settings screen, and there is no user ID associated to the Requisitioner/ Buyer, then the system will suppress the organization security validations against it.

Scenario E

This scenario presents validations when organization security is previously disabled and the **Planner's Org** field was left blank. When you enable organization security, Costpoint will only display and let you access MO records where you have full rights to the planner's organization.

Use Case Scenarios

1. Log in as user AD005 and go to the View Manufacturing Order Status (PCQMOST) and Manage Manufacturing Orders (PCMMOMNT) screens.
2. Use **Query** to define search parameters for data records maintained by the application.

Prior to running Load Organization IDs (PCPLDORG), there are only 61 records that can be accessed by user AD005, and all MOs have planner's organization IDs that (a) is equal to 1.1.100 and (b) begins with 1.2 and 1.3.

The screenshot shows the 'View Manufacturing Order Status' interface. At the top, there are search filters for MO, Project, Planner, Warehouse, Part, Netting Group, and Need Date Cutoff. Below these are checkboxes for status: Released, Closed, Planned, Firm Planned, In-Shop, and Completed. The main area displays details for a specific MO, including 'Organization' (1.1.100), 'Org Abbrev' (100), 'Level of Explosions' (1), and 'Priority' (5). There are also sections for 'Allocation Project Information' and 'Activity'.

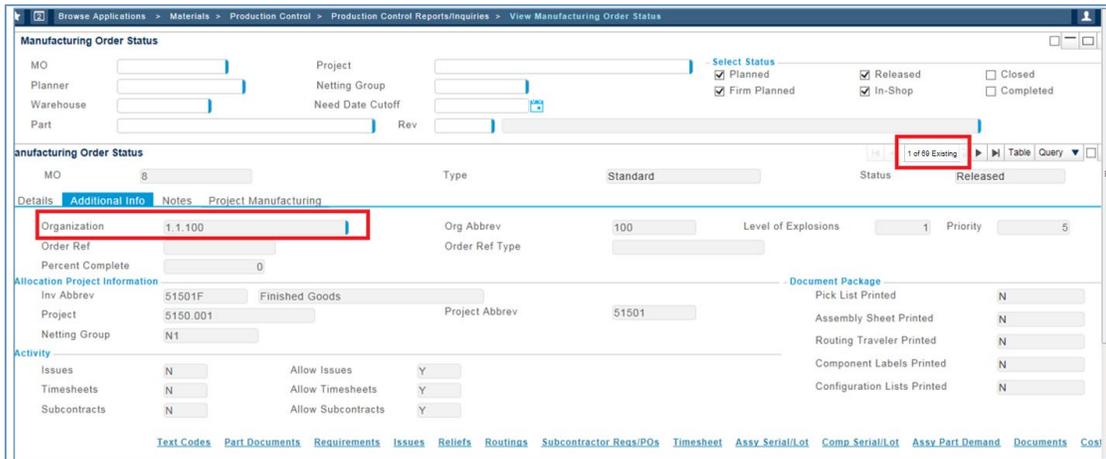
The screenshot shows the 'Manage Manufacturing Orders' screen with a table of manufacturing orders. The table has columns for Manufacturing Order ID, Common Stock, Load from Inv, Order Date, Need Date, Due Date, Completed Date, Planned Release Date, Released Date, Planned In-Shop Date, In-Shop Date, Build Project, Build Project Abbreviation, Build Project Name, Planner Organization, and Org Abbrev. The 'Planner Organization' column is highlighted with a red box, showing values such as 1.2.210 and 1.1.100.

In order to populate the organization ID to previously saved MOs, you must run the PCPLDORG application.

The screenshot shows the 'Load Organization IDs' utility screen. It includes a search area for Parameter ID and Description. Below that are 'Selection Ranges' for Manufacturing Order, Planner, and MO Order Date. The 'Options' section includes checkboxes for MO Status and Source Organization. The 'Source Organization' section has two radio buttons: 'Planner's Org ID' (selected) and 'Others'. A yellow callout box explains: 'If the user selects [A] Planner's Organization then the system will default in the Organization ID from the Manage Planner screen. If the user selects [B] Others, then user is required to input an organization ID to load on the manufacturing orders Planner Organization field.'

Use Case Scenarios

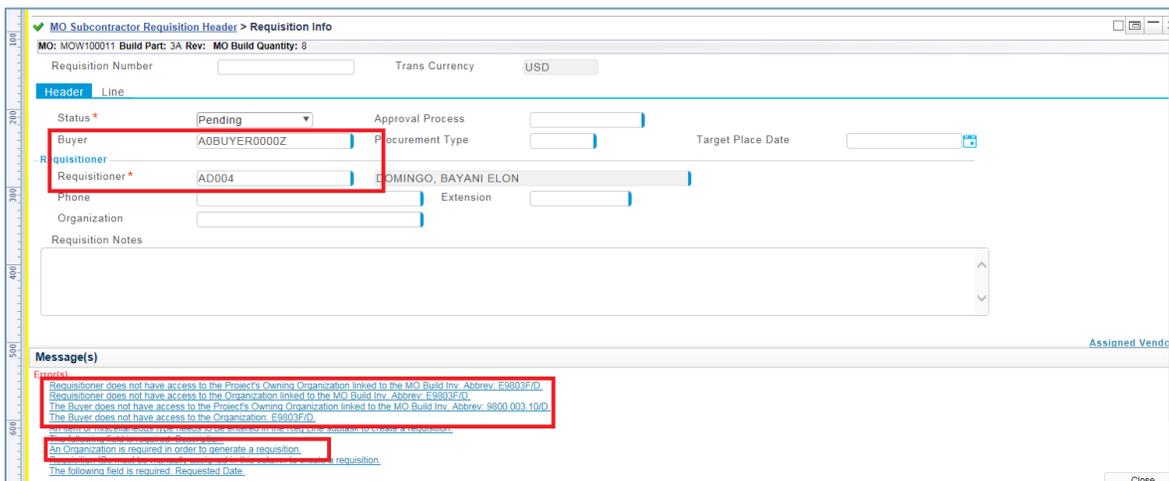
After running the utility, the number of records that can be retrieved by user AD005 has increased to 69 MOs.



Scenario F

This scenario presents the changes in logic on the Create MO Subcontractor Requisitions (PCMSCRQ) screen.

1. Log in as user AD005 and go to the Create MO Subcontractor Requisitions (PCMSCRQ) screen.
2. Enter the values for all required fields. Costpoint now validates the buyer and requisitioner against the MO.



Note: If the logged-in user is not authorized for the requisitioner's home organization, then the organization will not be defaulted on the screen. The user must enter or select a default organization for the requisition to be generated.

On data entry/new records, the system now validates all the Inv Abbrev, Projects, and Organizations (header and line) against the Buyer/Requisitioner if the **Apply Org Security for Employees without User ID** check box is selected on the Configure System Settings screen.

If the **Apply Org Security for Employees without User ID** check box is not selected on the Configure System Settings screen, and there is no user ID associated to the Buyer/Requisitioner, then the system will suppress the organization security validations against it.

Appendix: If You Need Assistance

If you need assistance installing, implementing, or using Deltek Costpoint 7.1.1, Deltek makes a wealth of information and expertise readily available to you.

Customer Services

For over 30 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Deltek Support Center.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Attention: Find out more about these and other services from the Deltek Support Center.

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

Attention: 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**.

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

Additional Documentation

The following table lists the Deltek documentation available for this release. Except where noted, all the user guides and quick reference guides listed in this table are available for download from the Deltek Support Center.

Document Name	Description
Deltek Costpoint 7.1.1 Organization Security - System Setup and Use Case Scenario for Engineering Change Notices Module	This document provides quick and functional setup guidelines about the Organization Security feature for the EC module.
Deltek Costpoint 7.1.1 Organization Security - System Setup and Use Case Scenario for Procurement Planning Module	This document provides quick and functional setup guidelines about the Organization Security feature for the PP module.
Deltek Costpoint 7.1.1 Organization Security - System Setup and Use Case Scenario for Inventory Module	This document provides quick and functional setup guidelines about the Organization Security feature for the IN module.
Deltek Costpoint 7.1.1 Organization Security - System Setup and Use Case Scenario for Purchase Order/Receiving Module	This document provides quick and functional setup guidelines about the Organization Security feature for the PO/RC module.
Deltek Costpoint 7.1.1 Organization Security - System Setup and Use Case Scenario for Production Control Module	This document provides quick and functional setup guidelines about the Organization Security feature for the PC module.
Deltek Costpoint 7.1.1 Organization Security - System Setup and Use Case Scenario for Sales Order Entry Module	This document provides quick and functional setup guidelines about the Organization Security feature for the OE module.

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