

Deltek Costpoint® 7.1.1

Release Notes: Organization Security –
Sales Order Entry

August 23, 2018

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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 Materials domain, specifically in the Sales Order Entry module. This feature ensures that correct user access is applied to the logged-in user ID in accessing inventory transactions by validating and filtering records/transactions as authorized for the user ID.

[Organization Security Overview Click-Thru](#)

Patch and System JAR Requirements

These enhancements require the following:

- Costpoint 7.1.1 System JAR 044 (cp711_sys_044.zip)
- PATCH3489
- PATCH5122

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	OE	Manage Sales Orders	OEMNTSO1	cp711_oemntso1_003.zip
Materials	OE	Manage Sales Order Supervisor Screen	OEMNTSO2	cp711_oemntso2_003.zip
Materials	OE	Approve Sales Orders	OEMAPPSO	cp711_oemappso_010.zip
Materials	OE	Print Sales Order Acknowledgments	OERACKN	cp711_oerackn_006.zip
Materials	OE	Manage Sales Order User-Defined Information	OEMSOU DI	cp711_oemsoudi_003.zip
Materials	OE	Create Purchase Requisitions from Sales Orders	OEPGRQ	cp711_oepgrq_011.zip
Materials	OE	Print Sales Order Pick List	OERPICK	cp711_oerpick_006.zip

Overview

Domain	Module	Application Name	Application ID	Application File
Materials	OE	Manage Sales Order Inventory Issues	OEMISSU1	cp711_oemissu1_002.zip
Materials	OE	Manage Sales Order Non-Inventory Issues	OEMISSU2	cp711_oemissu2_002.zip
Materials	OE	Manage Shipping Transactions	OEMSHIP	cp711_oemship_014.zip
Materials	OE	Print Packing Slips	OERPCKSL	cp711_oerpcksl_007.zip
Materials	OE	Print DD250 Packing Slips	OER250PS	cp711_oer250ps_006.zip
Materials	OE	Print WA250 Packing Slips	OERW250P	cp711_oerw250p_002.zip
Materials	OE	Print Sales Order Approval Status Report	OERAPPR	cp711_oerapper_003.zip
Materials	OE	Print Sales Order Backlog Report	OERBLOG	cp711_oerblog_003.zip
Materials	OE	View Sales Analysis information	OEQSALES	cp711_oeqsales_008.zip
Materials	OE	Create RFID Print File	OEPRFID	cp711_oeprfid_003.zip
Materials	OE	View Sales Order Status Information	OEQSTAT	cp711_oeqstat_009.zip
Materials	OE	Import Sales Orders	AOPSOPP	cp711_aopsopp_012.zip
Materials	OE	Load Organization IDs	OEPLDORG	cp711_oepldorg_001.zip
Materials	IN	Load Organization IDs	INPLDORG	cp711_inpldorg_002.zip
Materials	IN	Create Inventory Allocations	INPALLOC	cp711_inpalloc_005.zip

Administration Domain

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

View Help About (SYMABOUT)

The Features subtask on the View Help About (SYMABOUT) screen now includes the Organization Security feature for the Sales Order Entry module.

Materials Domain

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

Manage Sales Orders (OEMNTSO1)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's authorization for the organization ID (new). In addition, Costpoint will not display sales orders where organizations are left blank.
- Lookup
 - Project — Costpoint now narrows the search and displays only projects with owning organizations authorized for the logged-in user ID.
 - Organization — Costpoint now narrows the search and displays only organizations authorized for the logged-in user ID.
 - Inv Abbrev — Costpoint now narrows the search and displays only inventory abbreviations (standard material) with organizations, and projects (owning organization) authorized for the logged-in user ID.
 - Document — Costpoint now narrows the search and displays only documents that are linked to organizations authorized for the logged-in user ID. Costpoint also displays documents that are not linked to any organization.
- A new field, **Organization**, has been added to the screen. Use this field to enter an organization ID for the sales order. This field is required if the Organization Security feature is enabled.
- Costpoint now validates your selected/entered entries in several fields against your logged-in user ID's organization and project's owning organization rights.
- Approval Process (when approval process is enabled and you submit sales orders (SO) for approval) — If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the organization ID.
 - If none of the users for any of the approval titles in the approval process is authorized for the organization ID (new), Costpoint displays an error message.
 - If at least one of the users for the approval titles in the approval process is authorized for the organization ID (new), Costpoint displays a warning message.

Manage Sales Order Supervisor Screen (OEMNTSO2)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's authorization for the organization ID (new). In addition, Costpoint will not display sales orders where organizations are left blank.
- Lookup
 - Project — Costpoint now narrows the search and displays only projects with owning organizations authorized for the logged-in user ID.
 - Organization — Costpoint now narrows the search and displays only organizations authorized for the logged-in user ID.

- Inv Abbrev — Costpoint now narrows the search and displays only inventory abbreviations (standard material) with organizations, and projects (owning organization) authorized for the logged-in user ID.
- Document — Costpoint now narrows the search and displays only documents that are linked to organizations authorized for the logged-in user ID. Costpoint also displays documents that are not linked to any organization.
- A new field, **Organization**, has been added to the screen. Use this field to enter an organization ID for the sales order. This field is required if the Organization Security feature is enabled.
- Costpoint now validates your selected/entered entries in several fields against your logged-in user ID's organization and project's owning organization rights.
- Approval Process (when approval process is enabled and you submit sales orders for approval) — If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the organization ID.
 - If none of the users for any of the approval titles in the approval process is authorized for the organization ID (new), Costpoint displays an error message.
 - If at least one of the users for the approval titles in the approval process is authorized for the organization ID (new), Costpoint displays a warning message.

Approve Sales Orders (OEMAPPSO)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's authorization for the new organization ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- Costpoint now validates your selected/entered entry against your logged-in user ID's organization rights.
- Approval Process (when approval process is enabled and you submit sales orders for approval) — If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the organization ID.
 - If none of the users for any of the approval titles in the approval process is authorized for the organization ID (new), Costpoint displays an error message.
 - If at least one of the users for the approval titles in the approval process is authorized for the organization ID (new), Costpoint displays a warning message.

Print Sales Order Acknowledgments (OERACKN)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entry against your logged-in user ID's organization rights.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only sales orders linked to organizations that are authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- When you click **Print/Preview**, Costpoint displays all records where you have full rights to the organization.
- When you select **Flag SO Acknowledgment as Printed**, Costpoint only updates record flags where you have full rights to the organization.

- Logic has been added to the application to suppress all line details in the report if your logged-in user ID does not have full rights to the sales order organization, and the following message is printed: "Sales Acknowledgment not printed. Your user ID is not authorized for the Organization on this Sales Order."

Manage Sales Order User-Defined Information (OEMSOU DI)

Costpoint now finds and filters existing sales order records based on your logged-in user ID's organization rights for the new organization ID. In addition, Costpoint will not display sales orders where organizations are left blank.

Create Purchase Requisitions from Sales Orders (OEPGRQ)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entries against your logged-in user ID's organization and requisitioner's organization rights.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only sales orders linked to organizations authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- When you click **Execute**, Costpoint will only display and process records where you have full rights to the organization.
- Approval Process — If organization security is enabled in the system settings, and the screen is activated for organization security, Costpoint will not allow you to enter or select an SO if your user ID is not authorized for the requisitioner's organization linked to the SO.
 - If none of the users for any of the approval titles in the approval process is authorized for the requisitioner's organization, Costpoint generates the requisition but the approval process code is left blank, and status is set to **Pending**.
 - If at least one of the users for the approval titles in the approval process is authorized for the requisition organization, Costpoint generates requisitions with Approval and In-Approval status.
- When your logged-in user ID is not authorized for the organization linked to the SO which you created a requisition for, Costpoint prints a report with the following error message: "Requisition not created. Your user ID is not authorized for the Organization linked to this Sales Order."

Print Sales Order Pick List (OERPICK)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entry against your logged-in user ID's organization rights.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only sales orders linked to organizations that are authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- When you click **Print/Preview**, Costpoint displays all records where you have full rights to the organization.
- When you select the **Update Sales Order Pick List printed flag**, Costpoint only updates and processes records where you have full rights to the organization.

- When you click an SO and the SO selected is linked to an organization not authorized for your logged-in user ID, Costpoint displays an error message.
- Logic has been added to the application to suppress all line details in the report if your logged-in user ID does not have full rights to the organization linked to the SO, and the following message is printed: "SO information not printed. Your user ID is not authorized for the Organization on this Sales Order."

Manage Sales Order Inventory Issues (OEMISSU1)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entries against your logged-in user ID's organization and project owning organization rights.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only sales orders linked to organizations authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- A new field, **Organization**, has been added to the screen to display the organization ID for the sales order.
- Costpoint now saves the organization linked to the sales order in the inventory transaction table.

Manage Sales Order Non-Inventory Issues (OEMISSU2)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entries against your logged-in user ID's organization rights.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only sales orders linked to organizations authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- A new field, **Organization**, has been added to the screen to display the organization ID for the sales order.
- Costpoint now saves the organization linked to the sales order in the inventory transaction table.

Manage Shipping Transactions (OEMSHIP)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entries against your logged-in user ID's organization rights.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only sales orders linked to organizations authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's authorization for the organization linked to the SO associated with the shipping transactions. If this organization ID in the header section is blank, Costpoint will not display the record.
- A new field, **Organization**, has been added to the screen to display the organization ID for the sales order.

Print Packing Slips (OERPCKSL)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entries against your logged-in user ID's organization rights.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only sales orders linked to organizations authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- When you click **Print/Preview**, Costpoint displays all records where you have full rights to the sales order's organization.
- When you select **Flag Packing Slip as Printed**, Costpoint only updates and processes records where you have full rights to the sales order's organization.
- Logic has been added to the application to suppress all line details in the report if your logged-in user ID does not have full rights to the organization linked to the SO, and the following message is printed: "SO information not printed. Your user ID is not authorized for the Organization linked to this sales order."

Print DD250 Packing Slips (OER250PS)

The following are the changes to this screen:

- Lookup (Sales Order) — Costpoint now narrows the search and displays only sales orders linked to organizations that are authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- Costpoint now validates your selected/entered entries against your logged-in user ID's organization rights.
- When you click **Print/Preview**, Costpoint displays packing slips where you have full rights to the sales orders' organization.
- When you select **Flag DD250/WA250 Packing Slips as Printed**, Costpoint only updates the flag of the packing slips where you have full rights to the sales orders' organization.
- Logic has been added to the application to suppress all line details in the report if your logged-in user ID does not have full rights to the organization associated with the SO in the packing slip, and the following message is printed: "Packing Slip information not printed. User is not authorized for the organization linked to the sales order."

Print WA250 Packing Slips (OERW250P)

The following are the changes to this screen:

- Lookup (Sales Order) — Costpoint now narrows the search and displays only sales orders linked to organizations that are authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- Costpoint now validates your selected/entered entries against your logged-in user ID's organization and sales order's organization rights.
- When you click **Print/Preview**, Costpoint displays packing slips where you have full rights to the sales orders' organization.
- When you select **Update DD250/WA250 Printed Flag**, Costpoint only updates the flag of the packing slips where you have full rights to the sales orders' organization.

- Logic has been added to the application to suppress all line details in the report if your logged-in user ID does not have full rights to the organization associated with the SO in the packing slip, and the following message is printed: "Packing Slip information not printed. User is not authorized for the organization linked to the sales order."

Print Sales Order Approval Status Report (OERAPPR)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entry against your logged-in user ID's organization rights for the SO.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only SOs with organizations that are authorized for the logged-in user ID.
- When you click **Print/Preview**, Costpoint displays records where you have full rights to the SO organization. In addition, Costpoint will not display sales orders where organizations are left blank.

Print Sales Order Backlog Report (OERBLOG)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entry against your logged-in user ID's organization rights for the SO.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only SOs with organizations that are authorized for the logged-in user ID.
- When you click **Print/Preview**, Costpoint displays records where you have full rights to the SO organization. In addition, Costpoint will not display sales orders where organizations are left blank.

View Sales Analysis Information (OEQSALES)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entry against your logged-in user ID's organization rights for the SO.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only SOs with organizations that are authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- When you click **Execute**, Costpoint displays records where you have full rights to the SO organization. In addition, Costpoint will not display sales orders where organizations are left blank.

Create RFID Print File (OEPRFID)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entry against your logged-in user ID's organization rights for the SO.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only SOs with organizations that are authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.

- When you select **Create RFID Print File**, Costpoint displays records where you have full rights to the SO organization. In addition, Costpoint will not display sales orders where organizations are left blank.

View Sales Order Status Information (OEQSTAT)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entry against your logged-in user ID's organization rights for the SO.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only SOs with organizations that are authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- When you click **Execute**, Costpoint displays records where you have full rights to the SO organization. In addition, Costpoint will not display sales orders where organizations are left blank.

Import Sales Orders (AOPSOPP)

The logic of this application has been changed to load/populate the new Organization field on the Manage Sales Orders screen.

Load Organization IDs (OEPLDORG)

Use this new screen (**Materials » Sales Order Entry » Sales Order Entry Utilities » Load Organization IDs**) to load or default a value to the new field, **Organization**, for sales orders.

Note: You must run this utility before turning on organization security for a module. If you skip this process, query results will exclude sales orders with blank organization IDs.

Load Organization IDs (INPLDORG)

Use this new screen (**Materials » Inventory » Inventory Utilities » Load Organization IDs**) to load or default material handler's organizations for miscellaneous receipts and location transfer IDs. This utility automatically runs in the backend to populate the inventory transaction table for the other inventory transaction types such as Issue to Purchase Order (ISSUEPO), Issue to Manufacturing Order (ISSUEMO), Quantity Adjustment (ADJQTY), Cost Adjustment (ADJCST), Scrap Adjustment (ADJSCRAP), Project/Account Transfer (TRNFPAO), PO Receipt (TRNFRCPPT). It populates either the owning organization linked to the project or the material organization linked to the inventory abbreviation associated with the inventory transaction.

Note: You must run this utility before turning on organization security for a module. If you skip this process, query results will exclude records with blank organization IDs.

Create Inventory Allocations (INPALLOC)

The following are the changes to the lookup screen:

- Manufacturing Order — Costpoint now narrows the search and displays only manufacturing orders (MOs) where the logged-in user ID is authorized for the planner's organization ID. Costpoint will not display MOs without the planner's organization ID.
- Purchase Order — Costpoint now narrows the search and displays only POs where the logged-in user ID is authorized for the buyer's organization ID. Costpoint will not display POs without the buyer's organization ID.
- Inventory Issues — Costpoint now narrows the search and displays only inventory issue records where the logged-in user ID is authorized for the **To Organization**. Costpoint will not display records with blank **To Organization**.
- Inventory Transfer — Costpoint now narrows the search and displays only records where the logged-in user ID is authorized for the **To Organization**. Costpoint will not display records with blank **To Organization**.
- Sales Order — Costpoint now narrows the search and displays only sales orders where the logged-in user ID is authorized for the sales order organization ID. Costpoint will not display records sales order organization IDs are left blank.
- Costpoint will not create allocations to the transactions where the logged-in user is not authorized for, or where the reference organization IDs are left blank.

View Purchase Order Status (POQSTAT)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's authorization for the buyer's organization ID. In addition, Costpoint will not display records where buyer's organization IDs are left blank.
- Costpoint now validates your selected/entered entry against your logged-in user ID's rights to buyer's organization and organization linked to the requisition.
- Lookup (Purchase Order) — Costpoint now narrows the search and displays only purchase orders (PO) with buyer's organizations that are authorized for the logged-in user ID. In addition, Costpoint will not display POs where buyer's organizations are left blank.

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

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.

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