


Deltek Costpoint® 7.1.1

Organization Security: System Setup and
Use Case Scenario for Engineering
Change Notices Module

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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 was validated against the originator's organization ID. With this new feature, on data entry, the system now validates all the inventory abbreviations, projects, and organizations (header and line) against the originator, approver, and logged-in user ID.

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 Engineering Change Notices (EC) module and the changes made to the EC 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.

System Settings

Company Settings | Batch Job | Case Reporting

☒ Apply Organization Security ☒ Allow Reusing of Passwords Header Color: LightGreen ☒ Display System in the Header

☒ Apply Org Security for Employees without User ID ☒ Allow HR Org Manager/Rep from Other Companies

Environment Name: Test Env Name III

Email System

SMTP Server Name: SMTP.DELTEK.COM SMTP Port Number: 25

SMTP Server User ID: Password:

E-mail Redirect: ☐ Require SSL / TLS ☐ Send all emails from SMTP Server User ID

Company Defaults

☒ Print Cover Page Report Table Purge (Days): 8

Costpoint User Accounts

☒ Auto-create User Accounts Authentication Method: Database ☒ Allow Employee Override

Preferred Notification Method: Email

Default Settings

Default Page Size

Page Size: Letter Unit of Measure: Inches Page Height: 11.000 Page Width: 8.500

Top Margin: 0.250 Bottom Margin: 0.250 Left Margin: 0.250 Right Margin: 0.250

Default Font: Arial Narrow

Default Locale: en_US English (United States) ☐ Print Currency Symbol

Company Logo: DEMO LOGO

Select this checkbox to activate organizational security.

Note: If the **Apply Organization 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** check box is also selected by default, and the 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 applications 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

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 with 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 main window has a table with columns: Organization Security Group, Name, Organization Security Profile to Assign, and Profile Name. The 'Assign Profiles' button is highlighted. The dialog box has a 'Query Condition' section with a dropdown for 'Module' and a text input for 'begins with'. A yellow callout box points to the 'Assign Profiles' button with the text: 'A) the new modules does not exist for this Org Security Group'.

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. The main window has a table with columns: Organization Security Group, Name, Organization Security Profile to Assign, and Profile Name. The 'Assign Profiles' button is highlighted. The dialog box has a 'Query Condition' section with a dropdown for 'Module' and a text input for 'begins with'. A yellow callout box points to the 'Assign Profiles' button with the text: 'B) To load the new modules, user must click on the 'Assign Profile' pushbutton and assign an org security profile.'

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.

The screenshot shows the 'Manage Users' window with a table of users. The table has columns for ID, Name, Allow Saving of Personal Screen Configurations, Allow Screen Configuration Changes for UI Profiles, Employee ID, Phone, Extension, Default Locale, Locale Name, Email, and Enable AutoCom. Several rows are highlighted in red, including ORGSEC-USR-2, ORGSEC-USR-3, ORGSEC-USR-4, and ORGSEC-USR-5. Below the table, there is a 'Company Access' section with a table showing company access details for 'Company 1' and 'ORG SEC GROUP 5'.

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.

The screenshot shows the 'Update Organization Security Profiles' window. The 'Identification' section is active, showing fields for 'Parameter ID' and 'Description'. Below this, there is a 'Selection Ranges' section with a table for 'Profile', 'Option', 'Start', and 'End'. The 'Profile' column has a dropdown menu set to 'All'.

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.

Browse Applications > People > Employee > Basic Employee Information > Manage Employee Information

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

Salary Details

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%

Estimated Annual Hours 0.00
Standard Hourly Rate 0.0000
Employee Class
Employee Type Regular
☐ Seasonal Employee
☐ Variable Hours Employee
Rate Type Hourly
FLSA Classification ☐ Exempt ☒ Non-Exempt

Labor Group
Labor Location
Work Schedule
GLC * 01012
PLC
Overtime State * AL
Time Collection

Home Organization * 5.002
HR Organization
Detail Job Title ACCOUNTANT Staff Accountants
☐ Corporate Officer
Security Organization 5.001
Manager

Personnel Action 1
Personnel Action 2
Personnel Action 3
REF1
REG

Note: Use the Load Organization IDs (PPPLDORG) 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
										None	Equals	1.8
	AD002			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
				JEFTTEST1		JEFT1	JEFT1	N	Inclusive	Full	Equals	1
				JEFTTEST2		JEFT2	JEFT2	Y	Inclusive	Full	Equals	2
				JEFTTESTNONE								
				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
			ADSEC000001	AD1220	USERAD1220	AD1220	AD1220	Y	Inclusive	Full	Equals	1.2.200

Other Setup

OTHERS SETUP												
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
1.1.110	LJ001	BLANK										
1	ADP3	BLANK										

Use Case Scenarios

Scenario A

This scenario presents validations when approval for ECN is ON and for other changes made on the Manage Engineering Change Notices (ECMECN) screen.

Note: This scenario applies as well to the Approve Engineering Change Notice (ECMAPPR) and Update Approved Engineering Change Notice (ECMAMAIN) screens.

Approval Process Info

Approval Process	Approval Title Sequence	Approval Title	Approval Title User Seq	Approval Title User	Employee ID
JEFAPP	1	JEFAPP	1	JEFTEST1	
			2	JEFTEST2	
JEFAPP1	1	JEFAPT1	1	JEFUSER1	
	2	JEFAPT2	2	JEFUSER2	

1. Log in as user CPSUPERUSER and go to the Manage Engineering Change Notices (ECMECN) screen. The default originator is the employee ID associated with the logged-in user ID and the default organization ID is the home org ID linked to the employee.

Note: The ECN originator's organization is the reference organization to use when querying and printing ECN records. The logged-in user must have full access rights to the ECN originator's organization.

2. Change the organization ID to one that is not authorized for the logged-in user ID.

Use Case Scenarios

The screenshot shows the 'Enter Engineering Change Notices' form. The 'Originator' section is highlighted with a red box, showing the error message: 'Your user ID does not have access to the Originator's Organization: 5.' The form fields include: ECN ID, Description (sdfasdfsaf), Type (TYPE1), Class (II), Priority (A), Date (09/27/2018), Status (Pending), Reason (A11), Approval Process (JEFAPP), Employee (ASAKA), Name (Asaka, Leslie S C.P.A.), and Organization (5).

Note: Logged-in user ID CPSUPERUSER is only authorized for organizations that begin with 1 and 2.

3. Change the originator to another that is unauthorized for Org ID = 1.

The screenshot shows the 'Enter Engineering Change Notices' form with the 'Employee' field (AD005) and 'Organization' field (1) highlighted with a red box. The error message at the bottom states: 'Originator does not have access to the Originator's Organization: 1.' The form fields include: ECN ID, Description (sdfasdfsaf), Type (TYPE1), Class (II), Priority (A), Date (09/27/2018), Status (Pending), Reason (A11), Approval Process (JEFAPP), Employee (AD005), Name (DOMINGO, ANNABELLE), and Organization (1).

Note: On data entry/new records, the system now validates all the Inv Abbrev, Projects, and Organizations (header and line) against the Originator if the **Apply Org Security for Employees without User ID** check box is selected on the Configure System Settings screen. However, 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 Originator, then system will suppress the organization security validations against it.

4. Enter all required fields and JEFAPP1 as approval process.
5. Select **Submit for Approval** and click **Save**.

An error message displays because none of the approvers linked to the approval process is authorized for the originator's organization.

The screenshot displays the 'Enter Engineering Change Notices' interface in Deltek Costpoint. The form is divided into several sections: Identification, Basic Info, and Originator. The 'Approval Process' dropdown menu is highlighted with a red box and labeled 'JEFAAPP1'. A red arrow points from this box to a red-bordered message box at the bottom of the screen. The message box contains the following text: 'Error(s) ECN requires approval but none of the approver(s) for one or more of the approval title(s) is authorized for the Originator's Organization ID.'

6. Log in as user CPSUPERUSER and go to the Manage Engineering Change Notices (ECMECN) screen.
7. Enter all required fields and JEFAPP as approval process.
8. Select **Submit for Approval** and click **Save**.

A warning message displays because only approver JEFTEST1 is authorized for the originator's organization.

The screenshot displays the SAP Engineering Change Management (ECM) interface. At the top, the navigation bar shows the path: **Browse Applications** > **Materials** > **Engineering Change Notices** > **Engineering Change Processing** > **Manage Engineering Change Notices**. The main title is **Enter Engineering Change Notices**.

The **Identification** section includes fields for **ECN ID** (ECN-3051), **Description** (test), **Type** (AIRTY1), **Date** (09/12/2018), **Status** (Pending), **Class** (), **Reason** (A11), **Priority** (), **Originator** (), **Employee** (ASAKA), **Organization** (1.2 200), **Name** (Asaka, Leslie S C.P.A.), and **Phone** ().

The **Approval Process** dropdown is highlighted with a red box, and a red arrow points from it to the **Warning(s)** message box at the bottom. The message box contains the text: **Warning(s) Press OK to continue or CANCEL to abort. ECN requires approval but not all of the approver(s) for one or more of the approval site(s) is authorized for the Originator's Organization ID.**

The **Parts Impacted** table is visible, showing columns for **Line**, **Action Code**, **Original Part**, **Original Part Rev**, **Original Part Description**, **Original Part Security**, **Original Part Status**, **Original Part Active**, **Original CAGE**, and **Change-To Part**.

The **Navigation** bar at the bottom includes links for **Impacted Projects**, **Approvals**, **General Notes**, **Technical Notes**, **Implementation Notes**, **Text**, **Documents**, **EC Impacted Groups**, and **User-Defined Info**.

9. Query the system for ECN records. The system displays all ECN records that the logged-in user ID has full rights to.

Use Case Scenarios

Enter Engineering Change Notices

ECN ID: 122006 Description: A

Type: TYPE1 Class: I Priority: B

Date: 12/20/2006 Reason: A11

Status: Implemented Approval Process: JEG92 Revision: 0

Employee: W2KATH82 Name: AARON, W2KATH82 M

Organization: 1

Parts Impacted

Line	Action Code	Original Part	Original Part Rev	Original Part Description	Original Part Security	Original Part Status	Original Part Active	Original CAGE	Change-To Part	Change-To Rev	Change-To Part Description	Change Part Security	Change-To Part Status	Change-To MBOM Status
1	New Revision	P122006B		P122006B	Unrestricted	Released	<input checked="" type="checkbox"/>		P122006B	1	P122006B	Unrestricted	Released	Released

Part Documents MBOM Components MBOM Orig Assy MBOM Chng Assy EBOM Components EBOM Orig Assy EBOM Chng Assy

Enter Engineering Change Notices

ECN ID	ECN Revision	Description	ECN Type	Class	Priority	Organization	Submit for Approval	Date	Reason	Hold	Status	Approval Process	Employee
122006	0	A	TYPE1	I	B	1	<input type="checkbox"/>	12/20/2006	A11	<input type="checkbox"/>	Implemented	JEG92	AARON, W2K
1313	0	ECN FOR ECN1	ECTYP4	II	A	1.2.210	<input type="checkbox"/>	03/13/2001	A11	<input type="checkbox"/>	In-Approval	GEMS	W2KATH84
AM185643	0	test	AIRTY1	I		1.1.100	<input type="checkbox"/>	01/18/2012	A11	<input type="checkbox"/>	Implemented	ASAKA	Asaka, Leslie
AM185643-1	0	test	AIRTY1	I		1.1.100	<input type="checkbox"/>	01/18/2012	A13	<input type="checkbox"/>	Implemented	ASAKA	Asaka, Leslie
AMECN1234567890	0	test	AIRTY1	I		1.1.100	<input type="checkbox"/>	01/13/2012	A11	<input type="checkbox"/>	In-Approval	EAO	Asaka, Leslie
AUTO0001	0	auto01	AIRTY1	I	A	1.2.200	<input type="checkbox"/>	07/16/2018	A11	<input type="checkbox"/>	Approved	AUTO01	Asaka, Leslie
AUTO001	0	test	AIRTY1	I		1.2.200	<input type="checkbox"/>	07/13/2018	A11	<input type="checkbox"/>	Approved	AUTO01	o1, auto

Parts Impacted

Line	Action Code	Original Part	Original Part Rev	Original Part Description	Original Part Security	Original Part Status	Original Part Active	Original CAGE	Change-To Part	Change-To Rev	Change-To Part Description	Change Part Security	Change-To Part Status	Change-To MBOM Status
1	New Revision	P122006B		P122006B	Unrestricted	Released	<input checked="" type="checkbox"/>		P122006B	1	P122006B	Unrestricted	Released	Released

Part Documents MBOM Components MBOM Orig Assy MBOM Chng Assy EBOM Components EBOM Orig Assy EBOM Chng Assy

Scenario B

This scenario presents the changes in logic for the inquiry and reporting applications. Costpoint filters records based on the logged-in user ID's access to the ECNs (originator) organization ID.

ECN Status Inquiry

ECN: Type: Class: All

Priority: Organization:

Originator: Part: Rev: Doc Type: Document: Rev: Project: Impacted Group:

Select engineering change notice Status

☒ Pending ☒ Implemented

☒ In Approval ☐ Closed

☒ Approved ☐ Rejected

☒ Docs Updated ☐ Void

☒ Include ECNs on Hold

ECN Status Inquiry Details

Engineering Change Notice	Rev	Description	Status	Type	Class	Priority	Reason	Originator	Originator Name	Organization	Creation Date	Submitted for Approval Date	Internal Approval Date	Planned Implementation Date
122006	0	A	Implemented	TYPE1	I	B	A11	W2KATH82	AARON, W2KATH82 M	1	12/20/2006	12/20/2006	12/20/2006	
1313	0	ECN FOR ECN1	In Approval	ECTYP4	II	A	A11	W2KATH84	AARON, W2KATH84 M	1.2.210	03/13/2001	03/13/2001		
AM185643	0	test	Implemented	AIRTY1	I		A11	ASAKA	Asaka, Leslie S C P.A.	1.1.100	01/18/2012	01/18/2012	01/18/2012	
AM185643-1	0	test	Implemented	AIRTY1	I		A13	ASAKA	Asaka, Leslie S C P.A.	1.1.100	01/18/2012	01/18/2012	01/18/2012	
AMECN1234567890	0	test	In Approval	AIRTY1	I		A11	ASAKA	Asaka, Leslie S C P.A.	1.1.100	01/13/2012	02/12/2017		
AUTO0001	0	auto01	Approved	AIRTY1	I	A	A11	ASAKA	Asaka, Leslie S C P.A.	1.2.200	07/16/2018	07/16/2018	07/16/2018	
AUTO001	0	test	Approved	AIRTY1	I		A11	AUTO01	o1, auto	1.2.200	07/13/2018	07/13/2018	07/13/2018	
AUTO002	0	test	Approved	AIRTY1	I		A11	AUTO02	auto2, 2	1.1.100	07/13/2018	07/13/2018	07/13/2018	
CPSUPERTEST	0	test	Approved	AIRTY1	I	A	A11	AUTO01	o1, auto	1.2.200	07/16/2018	07/16/2018	07/16/2018	
CRUD_0001	0	CRUD DESC	Approved	AIRTY1	1.5		A11	ASAKA	Asaka, Leslie S C P.A.	1	01/17/2014	06/04/2018	06/04/2018	

Use Case Scenarios

ECN Status Inquiry

ECN: [] Type: [] Class: All

Priority: [] Organization: []

Originator: []

Part: [] Rev: []

Doc Type: [] Document: [] Rev: []

Project: [] Impacted Group: []

Select engineering change notice Status

☒ Pending ☒ Implemented

☒ In Approval ☐ Closed

☒ Approved ☒ Rejected

☒ Docs Updated ☒ Void

☒ Include ECNs on Hold

ECN Status Inquiry Details

ECN: 122006 Rev: 0 A Status: Implemented

Basic ECN Info ECN Details Customer Info Customer Address

Class: I Priority: B Reason: A11 Organization: 1 Type: TYPE1

ECN Dates

Creation: 12/20/2006 Submitted for Approval: 12/20/2006 ECP: [] Rev: [] ECP Type: Not Applicable

Internal Approval: 12/20/2006 Suggested Effectivity: [] Approval Project: [] Hold: N

Implementation: 03/31/2017 Planned Implementation: [] Approval Process: JEG92 CAGE: OU812

Originator

Originator: W2KATH82 AARON, W2KATH82 M

Phone: [] Phone Ext: []

Impacted Projects Approval Groups Parts Documents User-Defined Info Notes Implementation Notes Technical Notes Customer Details Standard Text ECN WorkFI

On the Print Engineering Change Notice Travelers (ECRTRVLR) screen, the system filters records and prints only transactions based on the logged-in user ID's rights to the ECN's (originator) organization ID.

SuperTech, Inc.
ECN Traveler

Page 1 of 1

09/27/18 08:37 AM

Engineering Change Notice: ECN-3046

Description: []

Type: test Reason: REASON One Class: I Status: In Approval

Originator: [] Last First M

ECN Date: 09/29/18

Organization: 1

Charge Project/Act/Orig:

Impacted Groups

GROUPS

GROUP Group Group Name

GROUPS

QC GROUP

ECN Approval

Approval Process: JEFAPP1 test

Approval Seq No	Approval Title	Status	Approval Type	Customer Approval
1 JEFAPP1		Pending	Both	No
1 JEFAPP2		Pending	Both	No

Footer Label: This text should be the date today -> P:JMBASIC: 05-06-2015

Footer Text: This text should be the date today -> P:JMBASIC: 05-06-2015

Enter, or use Query to select, a parameter ID of up to 15 alphanumeric characters.

SuperTech, Inc.
ECN Traveler

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09/27/18 08:37 AM

Engineering Change Notice: JEF1111111

Description: []

Type: test Reason: REASON One Class: I Status: In Approval

Originator: [] Asaka, Leslie S C P A

ECN Date: 09/29/18

Organization: 12200

Charge Project/Act/Orig:

Impacted Groups

GROUPS

GROUP Group Group Name

GROUPS

QC GROUP

ECN Approval

Approval Process: AUT001 test

Approval Seq No	Approval Title	Status	Approval Type	Customer Approval
1 AUT001		Pending	Both	No

Footer Label: This text should be the date today -> P:JMBASIC: 05-06-2015

Footer Text: This text should be the date today -> P:JMBASIC: 05-06-2015

Scenario C

This scenario presents validations when organization security is previously deactivated and the Originator's Org field is left blank. When users activate organization security, the system only displays records and allows access to ECNs where the user has full rights to, and those records with originator's organization.

1. Log in to Costpoint as user CPSUPERUSER and go to the View Engineering Change Notice Status (ECQECNST) screen.
2. Use **Query** to define search parameters for data records maintained by the application.

Prior to running Load Organization IDs (ECPLDORG), there are only 26 records that can be accessed by user CPSUPERUSER, and all ECNs have originator's organization IDs that begin with 1 and 2 only.

Use Case Scenarios

ECN Status Inquiry

ECN: Type: Class:

Priority: Organization:

Originator:

Part: Rev:

Doc Type: Document: Rev:

Project: Impacted Group:

Select engineering change notice Status

☒ Pending ☒ Implemented

☒ In Approval ☐ Closed

☒ Approved ☒ Rejected

☒ Docs Updated ☒ Void

☒ Include ECNs on Hold

ECN Status Inquiry Details

ECN: 122006 Rev: 0 A Status: Implemented

Basic ECN Info ECN Details Customer Info Customer Address

Class: I Priority: B Reason: A11 Organization: 1 Type: TYPE1

ECN Dates

Creation: 12/20/2006 Submitted for Approval: 12/20/2006 ECP: Rev: ECP Type: Not Applicable

Internal Approval: 12/20/2006 Suggested Effectivity: Approval Project: Hold: N

Implementation: 03/31/2017 Planned Implementation: Approval Process: JEG92 CAGE: OU812

Originator

Originator: W2KATH82 AARON, W2KATH82 M

Phone: Phone Ext:

Impacted Projects Approval Groups Parts Documents User-Defined Info Notes Implementation Notes Technical Notes Customer Details Standard Text ECN WorkFI

In order to populate the originator's organization to previously saved ECNs, the user must first run the ECPLDORG utility.

ECN Utilities > Load Organization IDs

Identification

Parameter ID: Description:

This utility will allow users to populate the ECN Originator's Organization field in ECNs where it is blank based on the Organization Source selected on the screen.

Selection Ranges

ECN: All Start: End:

Originator: All

ECN Date: All

Options

Include ECN Status

☒ Pending ☒ Document Updated ☒ Void

☒ Approved ☒ Implemented

☒ Rejected ☒ Closed

Include ECN Classes

☒ I ☒ 1.5 ☒ II

Source Organization

☒ Originator's Home Org

☐ Others:

If user selects (A) Originator's Home Org then system will default in the Home Org ID from the Employee Salary Info (EMPI_LAB_INFO_ORG_ID). Else if user selects (B) Others then user must input an organization ID to load on the ECNs that have blank Originator Org ID. The Organization field is required when option B is selected.

SuperTech, Inc.

ECN Source Organization

Page 1 of 1

09/27/18

09:45 AM

ECN	Originator	ECN Date	Status	Organization
CRUD_000000001		01/17/14	Pending	No current org information exists for this Originator. An organization is required for Org Security.
EC092010	TESTINGS	09/20/10	Approved	No current org information exists for this Originator. An organization is required for Org Security.
EC092010-0	TESTINGS	09/20/10	Rejected	No current org information exists for this Originator. An organization is required for Org Security.
EC092010-1	TESTINGS	09/20/10	Rejected	No current org information exists for this Originator. An organization is required for Org Security.
EC092810	TESTINGS	09/28/10	Approved	No current org information exists for this Originator. An organization is required for Org Security.
EC120810	TESTINGS	12/08/10	Approved	No current org information exists for this Originator. An organization is required for Org Security.
ECN-3041	ASAKA	03/05/18	Pending	1.2.200
ECN-3042	JEF1	03/05/18	Pending	1.2.200
ECN-3043	AIFLUC	03/05/18	Pending	1
ECN-3044	AIHOURLY	03/05/18	Pending	1
ECN-3045	ASAKA	03/06/18	Pending	1.2.200
ECN102810	TESTINGS	10/28/10	Implemented	No current org information exists for this Originator. An organization is required for Org Security.
ECN3044	AIHOURLY	03/05/18	Pending	1
JEF3192018	ASAKA	03/19/18	Pending	1.2.200
JEFTE2	ASAKA	03/27/18	Approved	1.2.200
JEFTEST2	100	02/28/18	Pending	1.3

Footer Label: This text should be the date today-> PJMBASIC : 05-06-2015

Footer Text: This text should be the date today-> PJMBASIC : 05-06-2015

After running the utility, the number of records that can be retrieved by the user CPSUPERUSER has increased to 135 ECNs.

Use Case Scenarios

ECN Status Inquiry

ECN Type Class

Priority Organization

Originator

Part Rev

Doc Type Document Rev

Project Impacted Group

Select engineering change notice Status

☒ Pending ☒ Implemented

☒ In Approval ☐ Closed

☒ Approved ☒ Rejected

☒ Docs Updated ☒ Void

☒ Include ECNs on Hold

ECN Status Inquiry Details

ECN Rev A Status

Basic ECN Info ECN Details Customer Info Customer Address

Class Priority Reason Organization Type

ECN Dates

Creation Submitted for Approval ECP Rev ECP Type

Internal Approval Suggested Effectivity Approval Project Hold

Implementation Planned Implementation Approval Process CAGE

Originator

Originator AARON W2KATH82 M

Appendix A: 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.



About Deltek

Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 23,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue. www.deltek.com