


Deltek Costpoint® 7.1.1

Organization Security: System Setup and
Use Case Scenario for Purchasing and
Receiving Modules

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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 buyer, approver, and logged-in user ID. In addition, the system now 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 Purchasing (PO) and Receiving (RC) modules and the changes made to the PO/RC 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 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**, checkbox 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 New Copy Delete 1 of 72 Existing Table Query

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

☒ **Apply Org Security** ☐ Inclusive ☐ Exclusive ☒ Both

Assign Organizations to Profile New Copy Delete Query

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	Als 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.

Organization Security Group

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

Assign Profiles To Modules

Module	Module Description	Organization Security Profile *	Profile Name
HS	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

Assign Profiles

Find Query Sort Saved Queries

Query Condition

or Module begins with RC

Return all records where: ☐ Match case of values

Module like 'OE%'
Module like 'IN%'
Module like 'PO%'
Module like 'RC%'

0 records will be returned Count Save Query Reset

Query Close

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.

Organization Security Group

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

Assign Profiles To Modules

Module	Module Description	Organization Security Profile *	Profile Name
HS	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		

Assign Profiles

Query

B) To load the new modules, user must click on the 'Assign Profile' pushbutton and assign an org security profile.

Message(s)

Please specify an Organization Security Profile to assign.

Close

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'.

ID	Name	Allow Saving of Personal Screen Configurations	Allow Screen Configuration Changes for UI Profiles	Employee ID	Phone	Extension	Default Locale	Locale Name	Email	Enable AutoCom
ORGSEC-USR-1	Org Sec, Emp1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ORGSECEMP1					KrysteneErikaSalac@deltek.com	<input checked="" type="checkbox"/>
ORGSEC-USR-2	Org Sec, emp2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ORGSECEMP2					KrysteneErikaSalac@deltek.com	<input checked="" type="checkbox"/>
ORGSEC-USR-2U	orgsec, emp4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ORGSECEMP4					KrysteneErikaSalac@deltek.com	<input checked="" type="checkbox"/>
ORGSEC-USR-3	orgsec, emp3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ORGSECEMP3					KrysteneErikaSalac@deltek.com	<input checked="" type="checkbox"/>
ORGSEC-USR-4	orgsec, emp4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ORGSECEMP4					KrysteneErikaSalac@deltek.com	<input checked="" type="checkbox"/>
ORGSEC-USR-5	Org Sec, emp2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ORGSECEMP2					KrysteneErikaSalac@deltek.com	<input checked="" type="checkbox"/>
ORGSEC-USR-50	orgsec, emp3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ORGSECEMP3					KrysteneErikaSalac@deltek.com	<input checked="" type="checkbox"/>
ORGSEC-USR-6	OrgSec, emp6	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ORGSECEMP6					KrysteneErikaSalac@deltek.com	<input checked="" type="checkbox"/>
ORGSEC-USR-7	orgsec, emp7	<input type="checkbox"/>	<input type="checkbox"/>	ORGSECEMP7					KrysteneErikaSalac@deltek.com	<input checked="" type="checkbox"/>

Company ID	Default Taxable Entity ID	Org Security Group ID	Labor	SSN	Cost	Price	Company Name	Org Security Group Name	Taxable Entity Name
1		OSGRP5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Company 1	ORG SEC GROUP 5	DELTEK, INC. - 1723*4156;7-8+9+0-

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 has fields for 'Parameter ID' and 'Description'. Below this, the 'Selection Ranges' section has a 'Profile' dropdown menu set to 'All', and 'Start' and 'End' date pickers.

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, Rate Type: Hourly, FLSA Classification: Non-Exempt

Home Organization: 5.002, HR Organization: , Detail Job Title: ACCOUNTANT, Security Organization: 5.001, Manager:

Note: Use the Load Organization IDs (POPLDORG) 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			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
				JEFTST1		JEFT1	JEFT1	N	Inclusive	Full	Equals	1
				JEFTST2		JEFT2	JEFT2	Y	Inclusive	Full	Equals	2
				JEFTSTNONE								
				JEFTST1		JEFT1	JEFT1	Y	Inclusive	Full	Equals	1
				JEFTST2		JEFT2	JEFT2	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

Use Case Scenarios

Scenario A

This scenario presents validations when organization security is used for the first time in the Purchasing and Receiving modules.

1. Log in as user AD1220 and go to the Manage Purchase Order (POMMAIN) screen.
2. Use **Query** to define search parameters for data records maintained by the application.

Prior to running the Load Organization IDs (POPLDORG) utility screen, Costpoint displays 94 records that the user can access, and all purchase orders (PO) would have organization IDs beginning with 1.2.200.

The screenshot shows the 'Manage Purchase Orders' application window. A 'Search Criteria' dialog box is open, displaying search parameters for Purchase Order ID, Release, Vendor, and Vendor Name. A red box highlights the text '94 records will be returned' in the dialog box.

In order to populate the organization IDs to previously saved POs, the user must first run the POPLDORG utility.

The screenshot shows the 'Load Organization IDs' utility screen. It includes selection ranges for Purchase Order, Buyer, Vendor, and Order Date. A red box highlights the 'Source Organization' field, which is set to 'Buyer's Home Org'. A yellow box contains instructions for the Source Organization field.

Use Case Scenarios

For ACA 2017 Foreign Taxable Entity						
Purchase Order Source Organization Report						
						Page 10/02/1 of 18 ¹³
						02:26 AM
Purchase Order	Rel	Vendor	Buyer	Order Date	Status	Org
AANNE-0001	0	ABC	A001	09/14/16	Open	1.2.200
AC-0001	0	ABC	A001	06/17/16	Open	1.2.200
AC-00013	0	ABC	A001	06/17/16	Open	1.2.200
AC-0002	0	ABC	A001	06/17/16	Open	1.2.200
AC-0003	0	ABC	A001	06/17/16	Open	1.2.200
AC-0004	0	ABC	A001	06/17/16	Open	1.2.200
AC-0005	0	ABC	A001	06/17/16	Open	1.2.200
AC-0006	0	ABC	A001	06/17/16	Open	1.2.200
AC-0007	0	ABC	A001	06/17/16	Open	1.2.200
AC-0008	0	ABC	A001	06/17/16	Open	1.2.200
AC-0009	0	ABC	A001	06/17/16	Open	1.2.200
AC-0010	0	ABC	A001	06/17/16	Open	1.2.200
AC-0011	0	ABC	A001	06/17/16	Open	1.2.200
AC-0012	0	ABC	A001	06/17/16	Open	1.2.200
AC-0014	0	ABC	A001	06/17/16	Open	1.2.200
AC-0015	0	ABC	A001	06/17/16	Open	1.2.200

After running the utility, the number of records that can be retrieved by user AD1220 has increased to 272 POs.

The screenshot shows the 'Manage Purchase Orders' application window. A 'Search Criteria' dialog box is open, displaying search filters for Purchase Order ID, Release, Vendor, and Vendor Name. A red rectangular box highlights the text '272 records will be returned' at the bottom of the dialog box. The background window shows various fields for purchase order management, including Buyer, Vendor, Order Date, and a table for Purchase Order Lines.

Scenario B

This scenario presents the changes in logic and the validations added on the Manage Purchase Orders (POMMAIN) screen when organization security has been enabled.

1. Log in as user CPSUPERUSER and go to the Manage Purchase Order (POMMAIN) screen.
2. Enter the values for all required fields.

Use Case Scenarios

The screenshot shows the 'Manage Purchase Orders' interface. In the 'Header' tab, the 'Organization' field is highlighted with a red rectangle. The field contains the value '2'. Other visible fields include 'Buyer' (JAX), 'Vendor' (JXVEND), 'Order Date' (10/02/2018), and 'Status' (Pending). The 'Purchase Order Lines' section shows a line item for '1/4' TEST PLUG'.

Note: A new field, **Organization**, has been added to the screen. When the user enters a buyer ID, the system defaults to the home organization associated with the buyer's employee ID.

The system now validates all the owning organization associated to the project and organizations linked to the selected inventory abbreviations and owning organization of the selected project(s)/organization(s) in both the header and line section against the logged-in user ID and the buyer.

This screenshot shows the same 'Manage Purchase Orders' interface, but with an error message displayed at the bottom. A red arrow points from the 'Buyer' field (JAX) to the error message. The error message states: 'The Buyer ID is not authorized for the Organization/Account assigned to this inventory abbreviation. The Buyer does not have access to the Organization linked to this Inv. Abbrev: 51501F1 2 200. The Buyer does not have access to the Project's Owning Organization linked to this Inv. Abbrev: 51501F1 2 200. The Buyer is not authorized for this ORG ID screen is not open. The Buyer does not have access to the Project's Owning Organization linked to this Project: 5150.001/1 2 200. The Buyer does not have access to the Organization: 1 2 200.'

Note: On data entry/new records, the system now validates all the Inv Abbrev, Projects, and Organizations (header and line) against the Buyer 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 with the Buyer, then the system will suppress the organization security validations against it.

Use Case Scenarios

Manage Purchase Orders

Purchase Order ID: [] Release: [0] Change Order: [0] Type: Purchase Order Trans Currency: USD

Header Other Information Accounting Defaults Other Defaults Vendor Address Bill To & Return Address Blanket Info Security Requirements

Project: [] Project Abbrev: []
 Account: [] Proj Acct Abbrev: []
 Organization: [] Org Abbrev: []
 REF1-NME: []
 REF2-NME: [] Inventory Abbrev: TEST

Implement Action Changes Create Blanket PO Release

Purchase Order Lines

PO Line	Line Type	Status	Item	Rev	Description	Part Security	Misc Type	U/M	Due Date	Desired Date
1	P	Open	100		1/4" TEST PLUG	Unrestricted				

Message(s)

Error(s)

Your user ID does not have access to the Organization linked to this Inv. Abbrev: TEST/4.100.C00.

The **Organization** field is a required field when creating new POs, and organization security has been enabled. This will also be the reference organization for the PO, which will be used for creating releases, inquiries, reports, receiving, and issuance.

Manage Purchase Orders

Purchase Order ID: [] Release: [0] Change Order: [0] Type: Purchase Order Trans Currency: USD

Header Other Information Accounting Defaults Other Defaults Vendor Address Bill To & Return Address Blanket Info Security Requirements

Buyer: MASTER Asaka, Leslie S C.P.A. Organization: []
 Vendor: MASTER Master Supply Company Va
 Vendor Address: MASTER
 Order Date: 10/02/2018
 Sales Tax/VAT Total: 0.00 PO Total: 0.00

Status: Open Procurement Type: []
☐ Load Part/Rev ID

Create Blanket PO Release

Purchase Order Lines

PO Line	Line Type	Status	Item	Rev	Description	Part Security	Misc Type	U/M	Due Date	Desired Date
1	P	Open	100		1/4" TEST PLUG	Unrestricted				

Message(s)

Error(s)

The Buyer's Buyer Organization for this Purchase Order must be entered to properly validate Organization security.

Warning(s)

The following engineering change notices are pending for this partrev: Part: 100 Rev: EGN EC-WF001 Status: Pending.
 The following engineering change notices are pending for this partrev: Part: 100 Rev: EGN WJ/002 Status: Approved.
 The following engineering change notices are pending for this partrev: Part: 100 Rev: EGN WJ/006 Status: Approved.
 The following engineering change notices are pending for this partrev: Part: 100 Rev: EGN WJ/001 Status: Pending.

Enter, or use Lookup to select, the Buyer's Organization ID.

Upon query, the system now filters all records that can be accessed by the user and the user must have full rights to the PO's organization.

Manage Purchase Orders

Buyer Name	Vendor	Vendor Name	Vendor Loc	Vendor Address	Order Date	Buyer Organization	PO Status	Procurement Type	Procurement Description	Load Part/Rev ID	Sales Tax/VAT Total	PC Ar
Alan Jackson	2DD	DELTA DYNAMICS		ADD	10/26/2007	1	Open				0.00	
Alan Jackson	2DD	DELTA DYNAMICS		ADD	11/02/2007	1	Open				0.00	
Alan Jackson	2DD	DELTA DYNAMICS		ADD	11/02/2007	1	Open				15.00	
Alan Jackson	2DD	DELTA DYNAMICS		ADD	11/05/2007	1	Open				15.00	
Alan Jackson	2DD	DELTA DYNAMICS		ADD	10/26/2007	1	Open				0.50	
Alan Jackson	2DD	DELTA DYNAMICS		ADD	08/02/2007	1	System Closed				25.00	
Alan Jackson	2DD	DELTA DYNAMICS		ADD	08/02/2007	1	Open				25.00	
Alan Jackson	2DD	DELTA DYNAMICS		ADD	08/17/2007	1	System Closed				0.00	

Purchase Order Lines

PO Line	Line Type	Status	Item	Rev	Description	Part Security	Misc Type	U/M	Due Date	Desired Date	Original Due Date	Delivery Schedule Exists	Quantity	Inv Abbrev	Gross Unit Cost
1	P	Open	3105C28-20		BOLT-U REF NAB3105C28-20	Unrestricted		EA	01/06/2010	01/06/2010	01/06/2010		10		2.00

Note: On the Approve Pending Purchase Orders (POMSTAT), Create Blanket Purchase Orders (POMRELS), Expedite Purchase Orders (POMEXPD), Manage Purchase Orders Expediting Notes (POMEXPN), and Create Purchase Order Change Orders (POMCHNG) screens, the user can only query, update and/or delete records where they have full access to the organization.

Scenario C

This scenario presents validations pertaining to rights of logged-in users, buyers, and employees used in transactions that require them to have full access to all the owning organizations associated to the project and organizations, which are linked to the selected inventory abbreviations and owning organization of the selected project(s)/organization(s) in both the PO header and line sections, as well as the subtasks.

1. Log in as user CPSUPERUSER and go to the Create Blanket Purchase Order Releases (POMRELS) screen.
2. Use **Query** to define the blanket PO that you want to create a release.

The screenshot displays the 'Create Blanket Purchase Order Releases' (POMRELS) screen. The 'Identification' section shows 'Blanket PO' as '00-BLANKET' and 'PO Type' as 'Blanket Order'. The 'Details' section includes fields for 'Change Order' (0), 'Last Release' (3), 'Trans Currency' (USD), 'New Release' (4), 'Buyer' (JAX), 'Organization' (1), and 'Vendor' (JXVEND). A red box highlights the 'Buyer *' field with the value 'TOM WILL'. A red arrow points from this field to a message box at the bottom of the screen. The message box contains the text: 'Error(s) The Buyer does not have access to the Project's Owning Organization linked to this Statement of Work: NEWQ25150.001/1.2.200.'

Note: On data entry/new records, the system now validates the Blanket Order Buyer's Organization and all the Inv Abbrev, Projects, and Organizations (line and subtasks) against the new Buyer 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 with the buyer, then the system will suppress the organization security validations against it.

3. Log in as user CPSUPERUSER and go to the Update Subcontract Retainage PO Status (POMSCST) screen.
4. Select a PO you want to update.

Use Case Scenarios

Update Subcontract Retainage PO Status

Identification
Status Update ID: Warehouse: Employee*: TONI1

Subcontract PO Information
Purchase Order*: 0803-2 Change Order: 0 Terms: NET 30 Trans Currency: USD
Buyer: MASTER Alan Jackson Organization: 1
Vendor: 2DD DELTA DYNAMICS Order Address Code: Autoload Recalculate

Vendor Contacts
Last Name: First Name: Phone: Fax: Header Notes:

CTW to Update Subcontract PO status
Subcontract Line: 1 Misc Type: MISC
Item: Rev: MISCELLANEOUS CHARGES

Work Details
Requested Work Amt: 0.00 Completed Work Ret Pct: 0.00% Code: MD
Percent Complete: 0.00% Completed Work Ret Amt: 0.00 Rate: 5.0000%
Completed Work Amt: 0.00 Stored Matl Ret Pct: 0.00% Amt Payable: 0.00

Message(s)
Error(s)
Employee does not have access to the PO Buyer's Organization: 1.
Warning: Requested Work Amount submitted by the subcontractor is different from the sum of Completed Work Amount and Stored Materials Amount.
Warning: The Total Eligible for Voucher amount for all lines is zero.

Note: On data entry/new records, the system now validates the PO Order Buyer's Organization against the Employee 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 with the employee, then the system will suppress the organization security validations against it.

5. Log in as user AD1220 and go to the Manage Buyers (POMBUY) screen.

Manage Buyers

Identification
Buyer ID*: JGBUYER Employee*: TEST

Details
Maximum Authorizations
PO: 100,000.00 Last PO Number: PO Line: 10,000.00
Buyer PO Auto-Numbering
PO Entry Authorization
Purchase Order: Release Order: Subcontractor Agreement: Subcontract Retainage PO: Subcontractor Agreement Blanket: Subcontractor Agreement Release: GFM/GFE Order: Subcontract Retainage PO: Subcontractor Agreement Release:

Default Return Address
Branch Location*: DS-MCLEAN DELTEK-MCLEAN DELTEK SYSTEMS - MCLEAN OFFICE
Address Code*: MCLEAN-RTN

Default Bill To Address
Branch Location*: DS-MCLEAN DELTEK-MCLEAN DELTEK SYSTEMS - MCLEAN OFFICE
Address Code*: MCLEAN1

Link Proj1
Project: Proj Abbrev: Project Name: Active: Select: 0122 MYPROJ Burden all issue Y 0162 0162 TOP LEVEL PROJ Y 01CT CITest Automation Script Y

Message(s)
Error(s)
Employee does not have access to the Organization: 1.
Employee does not have access to the Organization: 1-2 200.
Employee does not have access to the Organization: 1.
Employee does not have access to the Organization: 1.
Employee does not have access to the Projects Owning Organization linked to this Project: 5150 001/1 2 200.
Employee does not have access to the Projects Owning Organization linked to this Project: MPG1 001/1.
Employee does not have access to the Projects Owning Organization linked to this Project: MPG1 001 001/1.
Employee does not have access to the Projects Owning Organization linked to this Project: STAN 001/1.
Employee does not have access to the Projects Owning Organization linked to this Project: STAN 002/1 2.

Use Case Scenarios

Note: On data entry/new records, the system now validates the Organizations and Owning Org associated to the projects against the employee. 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 with the employee, then the system will suppress the organization security validations against it.

Link Projects

Project	Proj Abbrev	Project Name	Flow-Down	Default	Active
0122	MYPROJ	Burden at Issue			Y
0162	0162	0162 TOP LEVEL PROJ			Y
01CT		CTTest Automation Script			Y
0400	T&MTLB	PHILPS Project - T&MTLB			Y

Link Acct/Org

Account	Organization	Account Name	Organization Name	Default	Active
00001-104	1.2.200	Asset Misc 1	Product Development		Y
00001-200	1.2.200	WIP Mats	Product Development		Y
00005-001-00005	1.2.200	00005 3rd level	Product Development		Y
00005-001-00006	1.2.200	00005 3rd level	Product Development		Y

Message(s)

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

Scenario D

This scenario presents the changes in logic on the Manage Statement of Work (POMSOW) screen.

1. Log in as user AD1220 and go to the Manage Statement of Work (POMSOW) screen.
2. Use **Query** to define search parameters for data records maintained by the application. Upon query, the system now recognizes statement of work (SOW) with rights to the project's owning organization and SOWs without projects linked to it.

Manage Statement of Work

SOW Type	Active	Inactivate Other Revs	File Location	File Name	Created By	Created Date	Customer	Customer Name	Project	Project Name
ADMIN	<input checked="" type="checkbox"/>	<input type="checkbox"/>			ASAKA	Asaka, Leslie S C.P.A.				
9999999999	<input checked="" type="checkbox"/>	<input type="checkbox"/>			ASAKA	Asaka, Leslie S C.P.A.				
9999999999	<input checked="" type="checkbox"/>	<input type="checkbox"/>	BABES		ASAKA	Asaka, Leslie S C.P.A.	1AOPSOPP	1AOPSOPP	\$150.001	301A Commercial Catalogs
ADMIN	<input checked="" type="checkbox"/>	<input type="checkbox"/>			AD001	DOMINGO, ANNABELLE B				
DESIGN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	KES	SOW.txt	ASAKA	Asaka, Leslie S C.P.A.				
DESIGN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	KES	SOW.txt	ASAKA	Asaka, Leslie S C.P.A.				
DESIGN	<input type="checkbox"/>	<input type="checkbox"/>	KES	SOW.txt	ASAKA	Asaka, Leslie S C.P.A.				
9999999999	<input checked="" type="checkbox"/>	<input type="checkbox"/>			ASAKA	Asaka, Leslie S C.P.A.				
DESIGN	<input checked="" type="checkbox"/>	<input type="checkbox"/>			ASAKA	Asaka, Leslie S C.P.A.				
DESIGN	<input checked="" type="checkbox"/>	<input type="checkbox"/>			ASAKA	Asaka, Leslie S C.P.A.				

Project \$150.001 has an Owning Org of 1.2.200.

When creating new records, both the logged-in user and the employee must have full access to the owning organization of the project.

Use Case Scenarios

★ Browse Applications > Materials > Purchasing > Statement of Work > Manage Statement of Work

Identification
Statement of Work ID * AD-ORG SEC REGRESSION Rev Description * AD-ORG SEC REGRESSION

Statement of Work Details Customer/Project Information

Customer
Project A001.02.B DUUUUUUUUUUUUE Project Abbrev
Prime Contract No DPAS Purchasing Rating
Notes

Load SOW

Message(s)
Error(s)
Your user ID does not have access to the Project's Owning Organization linked to this Project: A001.02.B/1.3.300.

★ Browse Applications > Materials > Purchasing > Statement of Work > Manage Statement of Work

Identification
Statement of Work ID * AD-ORGSEC REGRESSION Rev Description * AD-ORGSEC REGRESSION

Statement of Work Details Customer/Project Information

SOW Type * 999999999 ☒ Active ☐ Inactivate Other Revisions
File Location
File Name
Created By * TACC1 LastTACC1Update, FirstTAC
Created Date * 05/17/2018

Load SOW

Message(s)
Error(s)
This file location does not exist - or there are insufficient rights to access it.
Employee does not have access to the Project's Owning Organization linked to this Project: S150.001/1.2.200.

Note: On data entry/new records, the system now validates the Owning Org associated to the Projects against the Created By (employee) 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 Created By (employee), then the system will suppress the organization security validations against it.

The **Project** field will also be a required field when organization security is enabled.

Use Case Scenarios

The screenshot shows the 'Manage Statement of Work' window in the Deltek software. The 'Customer/Project Information' tab is selected. The 'Project' field is highlighted with a red box. Below the form, a message box displays an error: 'The Project must be entered to properly validate Organization security.'

Scenario E

This scenario presents the changes in logic for the inquiry and reporting applications/screens. The system now filters records based on the logged-in user access to the PO buyer's organization ID.

Note: Similar changes apply to the following applications: View Item Purchasing Information (POQITEM), View Purchase Order Change Orders (POQCHNG), View Purchase Order Commitments Summary (POQCOMM), View Purchase Order Status (POQSTAT), Archive Purchase Orders (POPARCH), Print Purchase Order Change Orders (PORPCO), Print Purchase Orders (PORPPO), Print Purchase Order Activity Report (PORACTV), Print Purchase Order Expediting Report (POREXP), and Print Purchase Order Register Report (PORREG).

Note: A separate application ID, MEQITEM, has been created for View Item Purchasing Information in the Materials Estimating (ME) module. This is to allow you to assign a different organization security group/profile for the View Item Purchasing Information screen in the ME module.

If you access the View Item Purchasing Information screen via POQITEM and your module rights are under the Purchasing (PO) module, you now have to set up user rights and profiles for the View Item Purchasing Information screen using the MEQITEM application ID. However, license for both screens remain under the PO module.

Note: A separate application ID, PPQITEM, has been created for View Item Purchasing Information in the Procurement Planning (PP) module. This is to allow you to assign a different organization security group/profile for the View Item Purchasing Information screen in the PP module.

If you access the View Item Purchasing Information screen via POQITEM and your module rights are under the Purchasing (PO) module, you now have to set up user rights and profiles for the View Item Purchasing Information screen using the PPQITEM application ID. However, license for both screens remain under the PO module.

Use Case Scenarios

Note: A separate application ID, RCQSTAT, has been created for View Purchase Order Status screen in the Receiving (RC) module. This change allows you to assign a different organization security group/profile for the View Purchase Order Status screen in the RC module.

If you access the View Purchase Order Status screen via POQSTAT and your module rights are under the PO module, you now have to set up user rights and profiles for the View Purchase Order Status screen using the RCQSTAT application ID. However, license for both screens remain under the PO module.

Log in as user AD1220 and go to the View Purchase Order Status Information (POQSTAT) screen. The system filters records based on the user's rights to the PO organization.

PO Change Order Inquiry

PO * AD-MD00002 Release *

Current Change Order

Change Order: 1 Change Date: 04/20/2017 Type: Purchase Order Trans Currency: USD

Vendor: AD-VENDOR AD-VENDOR DC

Buyer: MASTER Asaka, Leslie S C.P.A. Organization: 1.2.200

Status: System Closed Procurement Type: Order Date: 04/19/2017

Trans Total Amount: 1,088,750.43 Trans Change from Previous Amt: -1,060,195,985,239.34

Func Total Amount: 1,088,750.43 Func Change from Previous Amt: -1,060,195,985,239.34

[Header Text](#) [Header SOW](#) [Header Documents](#) [Current CO LI](#)

PO Change Order Inquiry

Change Order	Change Date	Trans Curr Total Amount	Trans Change from Previous Amt	Func Curr Total Amount	Func Change from Previous Amt	Type	Status	Procurement Type	Vendor	Vendor Name	Ext	Vendor Address	First Name	Last Name	Phone
0		1,060,197,073,989.77	0.00	1,060,197,073,989.77	0.00	Purchase Order	System Closed		AD-VENDOR	AD-VENDOR	DC	VENDOR			

[Header Text](#) [Header SOW](#) [PO Header Documents](#) [Old CO LI](#)

Note: Logged-in user ID AD1220 only have access to Org ID-1.2.200.

On the Print Purchase Order Activity Report (PORACTV) screen, the system will filter records based on the user's rights to the PO buyer's organization.

For ACA 2017 Foreign Taxable Entity									
PO Activity Report									
Project: 0003 Project Abbrev: 0003 0031144 Prime Contract:									
PO	Rel	Chg Ord	Vendor/Name	Line	Item/Description	Rev	Order Date/Change Date	Line Amount	Allocated Amount
PO031314-0	0	0			PO not printed - Your user ID is not authorized for the Buyer's Org on this purchase order.				
63771-001	0	0			PO not printed - Your user ID is not authorized for the Buyer's Org on this purchase order.				
PO-83	0	0			PO not printed - Your user ID is not authorized for the Buyer's Org on this purchase order.				
VN0001	0	0			PO not printed - Your user ID is not authorized for the Buyer's Org on this purchase order.				
Total Amount:								\$ 201.00	
Large:								100.00%	\$ 201.00
Small:								0.00%	\$ 0.00
Small Disadvantaged:								0.00%	\$ 0.00
Small HUBZone:								0.00%	\$ 0.00
Small Woman-Owned:								0.00%	\$ 0.00
Small Woman-Owned Disadv:								0.00%	\$ 0.00
Small Veteran-Owned:								0.00%	\$ 0.00
Small Service-Disabled Vet:								0.00%	\$ 0.00
Hist Black College:								0.00%	\$ 0.00
Non-Profit:								0.00%	\$ 0.00
Foreign/Other:								0.00%	\$ 0.00
ANC/Indian Tribe Not Small:								0.00%	\$ 0.00
ANC/Indian Tribe Not Small/Disadvantaged:								0.00%	\$ 0.00

USER SPECIFIED FOOTER LABEL FOR BIRT TESTING
This is to verify that user specified text content is properly displayed for footer text. BIRT testing only.

Scenario F

This scenario presents the changes in logic for the Receiving module.

Use Case Scenarios

1. Log in as user AD1220 and go to the Manage Purchase Order Receipts (RCMPORC) screen. Upon query of receipts, the system will filter records based on the user's rights to the PO buyer's organization.

When you receive a PO and you changed the material handler, the system displays an error message when the material handler does not have rights to the PO buyer's organization. This is due to system validation of the logged-in user ID and material handler's rights against the PO buyer's organization.

Note: On data entry/new records, the system now validates the PO's Organization 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 Material Handler, then the system will suppress the organization security validations against it.

2. Log in as user AD1220 and go to the Manage Quality Open Control Inspections (RCMINSP) screen. Upon query of inspection receipts, the system will filter records based on the user's rights to the PO buyer's organization.

When you create an inspection receipt transaction and you changed the inspector, the system displays an error message when the inspector does not have rights to the PO buyer's organization. This is due to system validation of the logged-in user ID and material handler's rights against the PO buyer's organization.

Use Case Scenarios

Enter QC Inspections

Warehouse: WHSE1 Inspection ID: PO Receipt: 0603-1-1 Insp Date: 10/02/2018 Trans Currency: USD

PO Information: PO: 060314-1 Release: 0 Change Order: 0 Vendor: DELTA DYNAMICS Buyer: A001 Organization: 1

Defaults: Inspector: ADSEC000001 Rejection Location: MEZZ-LVL2-C MRB Location: MRB LOCATION Insp Report ID:

Packing Slip: 0603-1-1 Notes:

Inspection Details

PO Line	Receipt Line	Item	Rev	Description	Part Security	Type	Misc Type	PO U/M	Incoming Inspection Location	Received Qty (PO U/M)

Message(s)

Error(s)
Your user ID does not have access to the PO Buyer's Organization linked to this Receipt: 1.

Enter QC Inspections

Warehouse: WHSE1 Inspection ID: PO Receipt: GRA8070301 Insp Date: 10/02/2018 Trans Currency: USD

PO Information: PO: GRA8070301 Release: 0 Change Order: 0 Vendor: 41 Customer long name Buyer: A001 Organization: 1.2.200

Defaults: Inspector: GREGKOZY Rejection Location: MEZZ-LVL2-C MRB Location: MRB LOCATION Insp Report ID:

Packing Slip: GRA8070301 Notes:

Inspection Details

PO Ln: Receipt Ln: Item: GRA80703 PART-BBB TEST

Part Security: Unrestricted Delivery Schedule Exists

QC Inspection Details

Inspection Report ID	Inspector	Acceptance Quality Level
	GREGKOZY	

Quantities (PO U/M)

PO U/M	Received Qty	Accepted Qty	MRB Qty	Inspected Qty
EA	10	0	0	0

Quantities (Inventory U/M)

Inventory U/M	Received Qty	Accepted Qty	MRB Qty	Inspected Qty
EA	10	0	0	0

Location Details

Incoming Inspection Location	Acceptance Location	MRB Location	Inspection Type
SEC2-ROW2-C-1			

Message(s)

Error(s)
The Inspector does not have access to the PO Buyer's Organization: 1.2.200.

Note: On data entry/new records, the system now validates the PO's Organization against the Inspector 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 Inspector, then the system will suppress the organization security validations against it.

- Log in as user AD1220 and go to the Manage Vendor Returns (RCMTRN) screen. Upon query of vendor returns, the system will filter records based on the user's rights to the PO buyer's organization.

Use Case Scenarios

Enter Vendor Returns													
Return ID	Transaction Date	Employee	Vendor	Vend Name	Extn	Buyer	Buyer Name	RMA No	Warehouse	PO	Rise		
1000	08/16/2007	AJACKSON	ZDD	DELTA DYNAMICS		MASTER	Jackson, Alan			PO-10396	0		
27009	11/13/2006	ASAKA	ZDD	DELTA DYNAMICS		MASTER	Jackson, Alan			JR-1000	0		
GRA0816-1	09/29/2007	WZKATH82	ZDD	DELTA DYNAMICS		MASTER	Jackson, Alan		WHSE2	PO-10563	0	AC-32	
GRA1092302	09/28/2011	ASAKA	A1	A1 Plating		A001	Asaka, Leslie S C.P.A.		WHSE1	GRA0816-1	0		

Vendor Return Line													
Return Line	Orig PO	Orig PO Rise	Item	Rev	Description	Part Security	Misc Type	Quantity (PO U/M)	Quantity (Inv U/M)	Inv U/M	Rejection	Rej Reason	Order/Pmt Disposition
1	GRA10923-A	0	100		1/4" TEST PLUG	Unrestricted		1 EA	1 EA		<input checked="" type="checkbox"/>	A	Repair/Replace

When you create a vendor return transaction and you changed the employee/buyer, the system displays an error message when the employee/buyer does not have rights to the PO buyer's organization. This is due to system validation of the logged-in user ID and material handler's rights against the PO buyer's organization.

Enter Vendor Returns

Return ID

Transaction Date

Employee

Vendor

Buyer

RMA No

PO

GRA10923-A

Rise

Original PO Release

Original PO Line

Organization

Quantity (PO U/M)

Quantity (Inv U/M)

Message(s)

Employee does not have access to the Buyer's Organization linked to this PO/Release Order: 1.0

Note: On data entry/new records, the system now validates the PO's Organization against the Employee 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 Employee, then the system will suppress the organization security validations against it.

In addition, if the **Apply Org Security for Employees without User ID** check box is selected on the Configure System Settings screen, and when the Create a New PO check box is selected on the vendor header section, then the buyer must be authorized for the Purchase Order Buyer's Org (PO_HDR.BUY_ORG_ID) as well as the Orgs associated to the Inv Abbrev and Account subtask in the vendor line section. Otherwise, the system will also suppress the organization security validations against the Buyer.

The system also validates the PO/receipt for the organization linked to the record in relation to organization security.

Use Case Scenarios

Enter Vendor Returns

Return ID: GRA1092304 Transaction Date: 10/04/2011 Employee: G24

Vendor: MASTER Master Supply Company Va

Buyer: JAX Liggins, Jacqueline A

RMA No: Warehouse:

PO: AD-166654 Rise: Location:

Vendor Return Line

Line Details: Return Line: 1 Original PO: AD-166654 Original PO Release: Original PO Line: 1 Organization: NULL ORGANIZATION ID

Item: MOUSE Rev: Standard Two Button Mouse

Misc Type: Rejection Inv Abbrev: Rej Reason: A Due Date: 10/03/2016 Buyer: MASTER Original Unit Cost: 55.00

Quantity (PO U/M): 1 PO U/M: GRO Order/Pmt Disposition: Repair/Replace Unit Credit/ Repair Amount: 55.00

Quantity (Inv U/M): 0.00694444 Inv U/M: EA Update Last Cost: Ext Credit/ Repair Amount: 55.00

Message(s)

Error(s) The Purchase Order's / Receipt's Organization must be present to properly validate Organization security.

- Log in as user CPSUPERUSER and go to the Enter Miscellaneous Inventory Receipts (RCMMSRC) screen. Upon query, the system will filter the records based on the user's rights to the new **Organization** field.

Receive Miscellaneous Inventory

Warehouse: WHSE1 Miscellaneous Receipt ID: MR-0001 Transaction Date: 02/22/2000 Material Handler: ASAKA

Default Inv Abbrev: Location: Use Part/Project Location Default

Total Received Amt: 860.00

Receive Miscellaneous

Line: 1 Part: 100500-1 Rev: Model: 9000 U/M: EA

Part Security: Unrestricted

Line Details Cost Elements Other Info

Receipt: Inv Abbrev: INVT1 Receipt Location: SEC4-ROWC-4-0 Receipt Qty: 10

QC Requirements: QC Insp Reqd: N Inspection Type: Source Insp Reqd: N Certif of Conf Reqd: N

Note: The default value for the Organization field is the home organization associated to the material handler's employee ID. This is an editable field and the user can change the value.

When you create a miscellaneous receipt transaction, the system now validates the logged-in user ID and the material handler's access rights to the organization.

Use Case Scenarios

Receive Miscellaneous Inventory

Warehouse * CRP-W1 Miscellaneous Receipt ID SAGDFGSD Transaction Date * 10/03/2018 Material Handler * MPES8 Organization 4

Default Inv Abbrev Default Location ☒ Use Part/Project Location Default Location

Total Received Amt

Receive Miscellaneous

Line * Part * Rev Part Security U/M

Line Details Cost Elements Other Info

Receipt Inv Abbrev * Receipt Location * Receipt Qty *

QC Requirements QC Insp Req Inspection Type Source Insp Req Cert of Conf Req

Message(s)

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

Receive Miscellaneous Inventory

Warehouse * CRP-W1 Miscellaneous Receipt ID SAGDFGSD Transaction Date * 10/03/2018 Material Handler * AD004 Organization 12

Default Inv Abbrev Default Location ☒ Use Part/Project Location Default Location

Total Received Amt

Receive Miscellaneous

Line * Part * Rev Part Security U/M

Line Details Cost Elements Other Info

Receipt Inv Abbrev * Receipt Location * Receipt Qty *

QC Requirements QC Insp Req Inspection Type Source Insp Req Cert of Conf Req

Message(s)

Error(s)
Material Handler does not have access to the Material Handler's Organization: 12.

Note: On data entry/new records, the system now validates all the Inv Abbrev, Projects, and Organizations (header and line) 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 Material Handler, then the system will suppress the organization security validations against it.

- Log in as user AD005 and go to the Print Receiving Log (RCRLOG) screen. The system will only print records where users have full rights to the PO buyer's organization. Details of the PO receipt will be suppressed if the user do not have full rights to the PO buyer's organization as well as an error message on the report.

Use Case Scenarios

k & K Co									
Receiving Log									
By Receipt Date									
PO	Rel	PO Line	Receipt/Line Packing Slip	Item/Description	Rev/ Warehouse	Deliver To/ Vendor	Qty Received/ U/M	Qty Accepted/ Qty Rejected	
GRA60907-1	0			PO Receipt not printed - Your user ID is not authorized for the Buyer's Org on this purchase order.					
Receipt Date:	10/12/16								
MULTIDD-1	0			PO Receipt not printed - Your user ID is not authorized for the Buyer's Org on this purchase order.					
Receipt Date:	10/18/16								
E100844	0	1 RC616061/1	PART 566087		WHSE1	41 Customer clone	EA	0	0
		E100844	PART 566087						0
		Inventory Abbrev	Project	Account	Organization				
		51501	5150.001	05230	1.2.200				
E100844	0	1 RC616062/1	PART 566087		WHSE1	41 Customer clone	EA	0	0
		E100844-1	PART 566087						0
		Inventory Abbrev	Project	Account	Organization				
		51501	5150.001	05230	1.2.200				
Receipt Date:	10/25/16								
MULTIDD-1	0			PO Receipt not printed - Your user ID is not authorized for the Buyer's Org on this purchase order.					
Receipt Date:	11/04/16								
MULTIDD-1	0			PO Receipt not printed - Your user ID is not authorized for the Buyer's Org on this purchase order.					
Receipt Date:	11/10/16								
PQ-010117	0			PO Receipt not printed - Your user ID is not authorized for the Buyer's Org on this purchase order.					
Receipt Date:	11/13/16								
MULTIDD-2	0			PO Receipt not printed - Your user ID is not authorized for the Buyer's Org on this purchase order.					
Receipt Date:	11/17/16								
MULTIDD-1	0			PO Receipt not printed - Your user ID is not authorized for the Buyer's Org on this purchase order.					
MULTIDD-2	0			PO Receipt not printed - Your user ID is not authorized for the Buyer's Org on this purchase order.					
Receipt Date:	11/20/16								
MULTIDD-2	0			PO Receipt not printed - Your user ID is not authorized for the Buyer's Org on this purchase order.					
Receipt Date:	12/07/16								
MULTIDD-2	0			PO Receipt not printed - Your user ID is not authorized for the Buyer's Org on this purchase order.					
Receipt Date:	12/10/16								
PQ-010117	0			PO Receipt not printed - Your user ID is not authorized for the Buyer's Org on this purchase order.					
Receipt Date:	01/11/17								
E100893	0	1 RC616081/1	PART 011117		WHSE1	41 Customer clone	EA	3	0
		E100893	PART 011117						0

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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.



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