


# Deltek Costpoint® 7.1.1

Organization Security: System Setup and  
Use Case Scenario for Procurement  
Planning Module

November 26, 2018



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# Contents

Overview .....	1
Objective.....	1
Organization Security System Setup .....	2
Configure System Settings (SYMSETNG) .....	2
Activate/Inactivate Organization Security by Module (SYMORGFN).....	2
Manage Organization Security Profiles (SYMORPRF) .....	3
Rights Application Method .....	3
Manage Organization Security Groups (SYMORGRP).....	4
Manage Users (SYMUSR) .....	6
Update Organization Security Profiles (SYPORGPF) .....	7
Rebuild Global Settings (SYPSTNG) .....	7
Additional Setup .....	8
Manage Employee Information (LDMEINFO) .....	8
Use Case Scenario Sample Data .....	9
Other Setup.....	9
Use Case Scenarios .....	10
Scenario A.1 .....	10
Scenario A.2 .....	11
Scenario B .....	13
Scenario C .....	13
Scenario D .....	20
Scenario E .....	22
Appendix: If You Need Assistance.....	25
Customer Services .....	25
Deltek Support Center .....	25
Access Deltek Support Center .....	26
Additional Documentation.....	26

## Overview

The Organizational 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.

## 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 Procurement Planning (PP) module and the changes made to the PP 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, checkbox** is also selected by default and system will validate the employee ID(s) access rights against the Organization related fields (Project, Inventory Abbrevs, and Organization). This is applicable for Materials Management 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, and 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:** There must be at least one organization ID linked to the organization profile, if the **Apply Org Security** check box is selected, otherwise, the user profile will have access to all organizations.

## Manage Organization Security Groups (SYMORGRP)

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

## Organization Security System Setup

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

The screenshot shows the 'Assign Profiles To Modules' dialog box. The 'Query Condition' section has 'Module' selected. The 'Return all records where:' section lists several modules: 'Module like 'OE'', 'Module like 'IN'', 'Module like 'PO'', and 'Module like 'RC''. A yellow callout box with the text 'A) the new modules does not exist for this Org Security Group' points to the 'Assign Profiles' button in the background window.

**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 'Query Condition' section has 'Module' selected. The 'Return all records where:' section lists several modules: 'Module like 'OE'', 'Module like 'IN'', 'Module like 'PO'', and 'Module like 'RC''. A yellow callout box with the text 'B) To load the new modules, user must click on the 'Assign Profile' pushbutton and assign an org security profile.' points to the 'Assign Profile' button in the background window.

**Note:** If organization security is enabled for a module or application, but it is missing from the list of organization security group, 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 neither create/enter new transactions nor view transactions.



## Organization Security System Setup

The screenshot shows the 'Enter Cost Adjustments' form. The 'Part to Adjust' section has fields for Inv Abbrev, Project, Organization, and Part. The 'Adjustment Charge Numbers' section has fields for Project, Organization, Account, and Expense Inv Abbrev. The 'Reference Structures' section has 'From' and 'To' fields. A message box at the bottom states: 'Message(s) The Org Security Profile is missing for one or more modules for your Org Security Group. Access to data may be severely restricted.' A red arrow points from this message to a yellow box with the text: '(A) Module/app that do not have an Org Security Profile linked to it.'

The screenshot shows the 'Enter Cost Adjustments' form with the 'Inv Abbrev' field set to '51501F'. A red box highlights the 'Inv Abbrev' field and the 'Organization' field. A red arrow points from the 'Inv Abbrev' field to a yellow box with the text: '(B) There will be validations on the Inv Abbrev(s), Project's Owning Org and/or Organization against the user log-in that will not allow them to create/enter new records'. Below the form, a message box states: 'Error(s) Your user ID does not have access to the Project's Owning Organization linked to this Inv Abbrev: 51501F/1.' Below this, another message box states: 'Error(s) The following field is required: Adjuster. The following field is required: Inventory Abbrev. The following field is required: Part.' At the bottom, a message box states: 'Message(s) The Org Security Profile is missing for one or more modules for your Org Security Group. Access to data may be severely restricted.'

## Manage Users (SYMUSR)

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

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

## Organization Security System Setup

The screenshot shows the 'Manage Users' application window. The main table lists users with 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, indicating specific users. Below the main table, there is a 'Company Access' section with a table showing Company ID, Default Taxable Entity ID, Org Security Group ID, Labor, SSN, Cost, Price, Company Name, Org Security Group Name, and Taxable Entity Name.

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-3	orgsec, emp4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ORGSECEMP4					KrysteneErikaSalac@deltek.com	<input checked="" type="checkbox"/>
ORGSEC-USR-4	orgsec, emp3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ORGSECEMP3					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-6	orgsec, emp3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ORGSECEMP3					KrysteneErikaSalac@deltek.com	<input checked="" type="checkbox"/>
ORGSEC-USR-7	OrgSec, emp6	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ORGSECEMP6					KrysteneErikaSalac@deltek.com	<input checked="" type="checkbox"/>
ORGSEC-USR-8	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	1	OSGRP5	<input type="checkbox"/>	<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 need to run this application after all of the organization security profiles have been set up, or any time the client adds an organization, or changes/adds a profile.

## 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 organizational security and when using the range feature for maintenance.

The screenshot shows the 'Update Organization Security Profiles' application window. The 'Identification' section includes fields for Parameter ID and Description. Below these fields, there is a 'Selection Ranges' section with a table for Profile, Option, Start, and End.

Profile	Option	Start	End
All			

## Rebuild Global Settings (SYPSTNG)

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

**Note:** You need to log out of the system and log back in, if the logged-in user ID is associated to an Org Security Group/Profile and 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

**Identification**

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  
☐ 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 Group / Manage Organization Security Profile (SYMORGRP / 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	ASAKA	BLANK	ASAKA	CPSUPERUSER	CPSUPERUSER	ALL	ALL	NO	Both	Full	Begins With	1
1.2.200	DAVIS	BLANK	DAVIS	JE22USER	CPSUPERUSER	JEG	JEG	Yes	Both	Full	Begins With	1
										None	Begins With	1.3
			DAVIS	WINGERDD	WINGERDD1	QCALL	ALL	Yes	Both	Full	Begins With	1, 2, 4, E
BLANK	3187	BLANK	3187	WENDY	CPSUPERUSER	SAMPLE	CTEST3	NO	Inclusive	Full	Begins With	1.2
										Full	Equals	1.8
			3187	WENDY2	CPSUPERUSER	ABCDEF	DRE	Yes	Exclusive	None	Begins With	1
	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
			BLANK	ADC	USERADC1	AD-MOD	AD-MOD	Yes	Both	Full	Begins With	2
										None	Begins with	5

## 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.1

This scenario presents sample validations when creating a new purchase requisition.

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

1. Log in as JE22USER and go to the Manage Purchase Requisitions (PPMNTRQ1) screen.

The screenshot shows the 'Manage Purchase Requisitions / Apply PO Info to Requisitions' screen. The 'Requisitioner' section is highlighted with a red box around the 'Organization' field, which contains the value '1.2.200'. A red arrow points from this field to a yellow callout box that reads: 'The system default in the 'Employee ID' associated to the logged-in user ID along with the Home Org from LDMEINFO'.

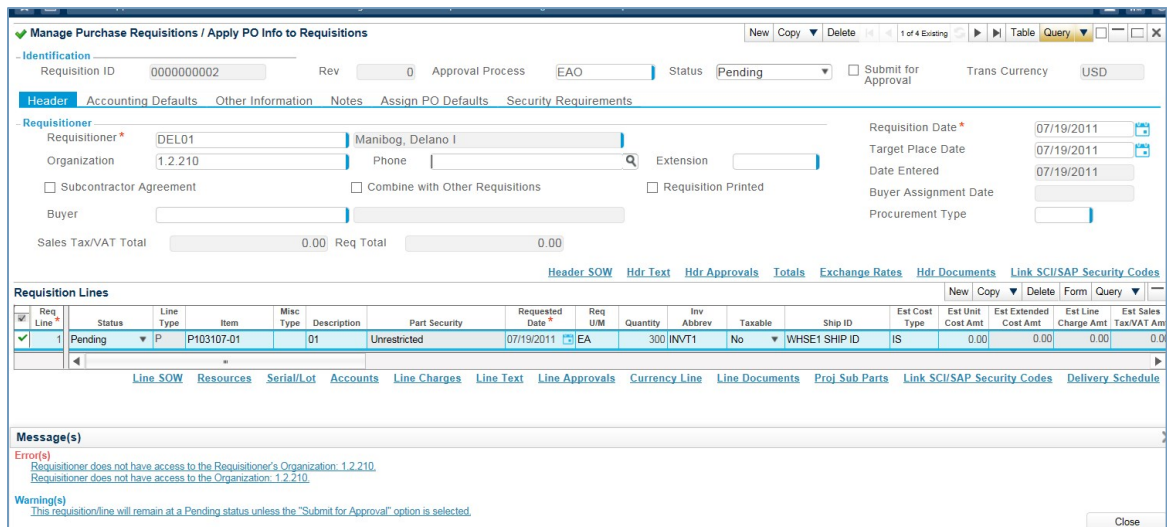
2. Change the organization ID to 1.3 (User JE22USER does not have access to this Org ID).

The screenshot shows the same screen as before, but the 'Organization' field now contains '1.3'. A red arrow points from this field to a red box at the bottom of the screen containing an error message: 'Error(s) Your user ID does not have access to the Requisitioner's Organization: 1.3.'.

## Use Case Scenarios

**Note:** The requisitioner's organization is the reference organization to use when creating purchase orders and/or inventory reservations from the purchase requisitions and for filtering the records when querying and printing requisitions. The logged-in user must have full rights to the requisitioner's organization to create transactions.

- Change the organization to 1.2.210 and the requisitioner to DEL01. This requisitioner should also have rights to the requisitioner's organization ID.



**Manage Purchase Requisitions / Apply PO Info to Requisitions**

Requisition ID: 0000000002 Rev: 0 Approval Process: EAO Status: Pending Submit for Approval: ☐ Trans Currency: USD

**Header** Accounting Defaults Other Information Notes Assign PO Defaults Security Requirements

**Requisitioner**

Requisitioner: DEL01 Manibog, Delano I  
 Organization: 1.2.210 Phone: Extension:   
☐ Subcontractor Agreement ☐ Combine with Other Requisitions ☐ Requisition Printed  
 Buyer:   
 Sales Tax/VAT Total: 0.00 Req Total: 0.00

Requisition Date: 07/19/2011  
 Target Place Date: 07/19/2011  
 Date Entered: 07/19/2011  
 Buyer Assignment Date:   
 Procurement Type:

**Requisition Lines**

Req Line	Status	Line Type	Item	Misc Type	Description	Part Security	Requested Date	Req UOM	Quantity	Inv Abbrev	Taxable	Ship ID	Ext Cost Type	Ext Unit Cost Amt	Ext Extended Cost Amt	Ext Line Charge Amt	Ext Sales Tax/VAT Amt
1	Pending	P	P103107-01	01	Unrestricted		07/19/2011	EA	300	INVT1	No	WHSE1 SHIP ID	IS	0.00	0.00	0.00	0.00

**Message(s)**

**Error(s)**  
 Requisitioner does not have access to the Requisitioner's Organization: 1.2.210.  
 Requisitioner does not have access to the Organization: 1.2.210.

**Warning(s)**  
 This requisition/line will remain at a Pending status unless the "Submit for Approval" option is selected.

**Note:** If the requisitioner's employee ID is linked to multiple user IDs, for as long as one of the user ID has full rights to the organization, then it passes the validation.

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

## Scenario A.2

When you create a new requisition, the system will validate the field in the example below.

Enter a Buyer that is not authorized for the Org IDs used in requisition but are authorized for user JE22USER.

Buyer = JEBUY1; Requisitioner's Org ID and Org ID (Accounting Defaults tab) = 1.2.200; Project = 1006.001.10 (Project's Owning Org ID = 1.2.200).



## Use Case Scenarios

**Manage Purchase Requisitions / Apply PO Info to Requisitions**

Requisition ID: 000000002 Rev: 0 Approval Process: EAO Status: Pending Submit for Approval: ☐ Trans Currency: USD

**Header** | Accounting Defaults | Other Information | Notes | Assign PO Defaults | Security Requirements

**Requisitioner**

Requisitioner\*: DAVIS Davis, Willie  
 Organization: 1.2.200 Phone: Extension:  
☐ Subcontractor Agreement ☐ Combine with Other Requisitions ☐ Requisition Printed  
 Buyer: JEBUY1 go, forever a  
 Sales Tax/VAT Total: 0.00 Req Total: 0.00

Requisition Date\*: 07/19/2011  
 Target Place Date: 07/19/2011  
 Date Entered: 07/19/2011  
 Buyer Assignment Date: 07/27/2018  
 Procurement Type:

**Requisition Lines**

Req Line*	Status	Line Type	Item	Misc Type	Description	Part Security	Requested Date*	Req U/M	Quantity	Inv Abbrev	Taxable	Ship ID	Est Cost Type	Est Unit Cost Amt	Est Extended Cost Amt	Est Line Charge Amt	Est Sales Tax/VAT Amt
1	Pending	P	P103107-01	01	Unrestricted		07/19/2011	EA	300	INV1	No	WHSE1 SHIP ID	IS	0.00	0.00	0.00	

**Message(s)**

**Error(s)**

- The Buyer does not have access to the Project's Owning Organization linked to this Project: 1006.001.10/1.2.200.
- The Buyer does not have access to the Organization: 1.2.200.
- The Buyer does not have access to the Requisitioner's Organization: 1.2.200.

**Warnings(s)**

This requisitionline will remain at a Pending status unless the "Submit for Approval" option is selected.

**Note:** Costpoint validates the buyer against all the organizations that are used in the requisition including the Accounts subtask in the line level if the **Apply Org Security for Employees without User ID** check box is selected on the Configure System Settings screen

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

Requisitions created by JE22USER:

**Manage Purchase Requisitions / Apply PO Info to Requisitions**

Requisition ID: 000000002 Revision: 0 Approval Process: EAO Status: Pending Submit for Approval: ☐ Trans Currency: USD Requisitioner\*: DAVIS Davis, Willie Organization: 1.2.200 Requisition Date\*: 07/19/2011 Target Place Date: 07/19/2011 Date Entered: 07/19/2011 Subcontractor Agreement: ☐ Combine with Other Reqs: ☐

**Requisition Lines**

Req Line*	Status	Line Type	Item	Misc Type	Description	Part Security	Requested Date*	Req U/M	Quantity	Inv Abbrev	Taxable	Ship ID	Est Cost Type	Est Unit Cost Amt	Est Extended Cost Amt	Est Line Charge Amt	Est Sales Tax/VAT Amt
1	Pending	P	P103107-01	01	Unrestricted		07/19/2011	EA	300	INV1	No	WHSE1 SHIP ID	IS	0.00	0.00	0.00	

## Scenario B

This scenario presents the expected behavior when **Apply Org Security** check box is not selected on the SYMORPRF screen.

Log in as WENDY and go to the PPMNTRQ1 screen.

The screenshot shows the 'Manage Purchase Requisitions / Apply PO Info to Requisitions' screen. The 'Requisitioner' field is set to 3187 and the 'Organization' field is set to 1.1. A red box highlights these two fields. A red arrow points from the 'Organization' field to the 'Message(s)' section at the bottom of the screen, which displays the message: 'Record modifications successfully completed.'

**Note:** The **Apply Org Security** for the user profile associated to the user group for this logged-in user ID is not selected; therefore, organization security validation is not applied for the user. All organizations are authorized and can be accessed by the user.

## Scenario C

This scenario presents sample validations when you query existing purchase requisitions. This also includes some of the system changes made when updating existing records, printing of purchase requisition reports, and viewing of records on the inquiry screens.

1. Log in as AD005 and go to the Manage Purchase Requisitions (PPMNTRQ1) screen.
2. On the Manage Purchase Requisitions screen, query any of the requisitions that were created in Scenario A or other requisitions where requisitioner's org ID is equal to the following 1.2.200, 1.8, or 1.3.300.



## Use Case Scenarios

Manage Purchase Requisitions / Apply PO Info to Requisitions													
Requisition ID	Revision	Approval Process	Status	Submit for Approval	Trans Currency	Requisitioner *	Requisitioner Name	Organization	Requisitioner Phone	Requisitioner Extension	Requisition Date *	Target Place Date	Date Entered
GFMP0623	1	APP22	PO Generated	<input type="checkbox"/>	USD	AJACKSON	Jackson, Alan	1.8			06/23/2015	06/23/2015	06/23/2015
GRA0723-1	0	A	Approved	<input type="checkbox"/>	USD	AJACKSON	Jackson, Alan	1.8			07/23/2007	07/23/2007	07/23/2007
GRA0723-2	0	A	Approved	<input type="checkbox"/>	USD	ASAKA	Asaka, Leslie S C P A	1.2.200			07/23/2007		07/23/2007
GRA0723-5	0	A	Approved	<input type="checkbox"/>	USD	ASAKA	Asaka, Leslie S C P A	1.2.200			07/23/2007		07/23/2007
GRA0810-1	0	A	Approved	<input type="checkbox"/>	USD	ASAKA	Asaka, Leslie S C P A	1.2.200			08/10/2007		08/10/2007
GRA8020901	0	GRAYCE	PO Generated	<input type="checkbox"/>	USD	ASAKA	Asaka, Leslie S C P A	1.2.200			02/09/2018	02/06/2018	02/09/2018
INV-RQ-010	0	A	Approved	<input type="checkbox"/>	USD	MAXIMILLIAN	Maximiliansombersteinson	1.3.300	12-456-1234		11/10/1995		11/10/1995
MO0811	0	APPRV02	Approved	<input type="checkbox"/>	USD	Q001	Asaka, Leslie	1.2.200			08/11/2011		08/11/2011
RD91007-01	0		Approved	<input type="checkbox"/>	USD	AJACKSON	Jackson, Alan	1.8			09/10/2007		09/10/2007

**Note:** The user AD005 does not have rights to the above-mentioned organizations. (Please refer to the prerequisite setup).

Requisitions are filtered based on the logged-in user rights to the requisitioner's organization ID regardless of those linked to the requisition line.

Manage Purchase Requisitions / Apply PO Info to Requisitions													
Submit for Approval	Trans Currency	Requisitioner *	Requisitioner Name	Organization	Requisitioner Phone	Requisitioner Extension	Requisition Date *	Target Place Date	Date Entered	Subcontractor Agreement	Combine with Other Reqs	Req Printed	Buyer
<input type="checkbox"/>	USD	3JEAN	Sawyer, Kathy P	1.2.210			11/05/2007	11/30/2007	11/05/2007	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	McCLELLW
<input type="checkbox"/>	USD	3JEAN	Sawyer, Kathy P	1.2.210			11/05/2007	11/30/2007	11/05/2007	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	McCLELLW
<input type="checkbox"/>	USD	3JEAN	Sawyer, Kathy P	1.2.210			11/08/2007	11/30/2007	11/08/2007	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	USD	ASAKA	Asaka, Leslie S C P A	1.1.100			01/22/2014		01/22/2014	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	USD	ASAKA	Asaka, Leslie S C P A	1.1.100			01/22/2014		01/22/2014	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	USD	JAO	Bangalore, Bug	1.2			05/25/2016		05/25/2016	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	USD	ASAKA	Asaka, Leslie S C P A	1.1.100			03/23/2015		03/23/2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	USD	ASAKA	Asaka, Leslie S C P A	1.1.100	203-555-7170	2124	06/02/1997	06/16/1997	02/05/1997	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	HARDWARE Johnson
<input type="checkbox"/>	USD	ASAKA	Asaka, Leslie S C P A	1.1.100	203-555-7170	2124	02/04/1997	01/16/2007	02/04/1997	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	HARDWARE Johnson

Only requisitions that have Org IDs equal to 1.1.100, Begins With 1.2 and Begins With 1.3 will be displayed and can be accessed by user 'AD005'

## Use Case Scenarios

**Manage Purchase Requisitions / Apply PO Info to Requisitions**

Identification: Requisition ID: 1105RQ-01, Rev: 0, Approval Process: CHER, Status: PO Generated, Submit for Approval: ☐, Trans Currency: USD

Header: Accounting Defaults, Other Information, Notes, Assign PO Defaults, Security Requirements

Requisitioner: Requisitioner: 3JEAN, Sawyer, Kathy P, Requisition Date: 11/05/2007, Target Place Date: 11/30/2007, Date Entered: 11/05/2007, Buyer Assignment Date: 11/05/2007, Procurement Type:   
 Organization: 1.2.210, User is authorized for Org 1.2.210, Extension:   
 Subcontractor Agreement: ☐, Combine with Other Requisitions: ☐, Requisition Printed: ☐   
 Buyer: MCCLELLW, Dog, Under   
 Sales Tax/VAT Total: 0.00, Req Total: 100.00

Requisition Lines: Req Line: 1, Line Type: P, Status: PO Generated, Resource Exists: ☐

Basic Information: Purchasing Information, Shipping & Receiving, Other Information, Notes, Security Requirements

Item: 1105.1, Rev:   
 Description: 1105.1, Part Security: Unrestricted, Requested Date: 11/30/2007   
 Quantity: 10, Ship ID: WHSE1 SHIP ID, Taxable: No, Inventory Abbrev: 51501

Estimated Cost Amounts: Manage Purchase Requisitions / Apply PO Info to Requisitions > Accounts

Requisition ID: 1105RQ-01, Requisition Total: 100.00, User is not authorized for 1.2.200, but we are only validating the records based on the Requisitioner's Org ID   
 Req Line: 1, Description: 1105.1, Quantity: 10, Req UIM: EA, Total Est Cost: 100.00

Project	Project Name	Proj Abbrev	Account	Account Name	Org Abbrev	Organization Name	Org Allocation	Allocated Amount	REF00001	REF00002
5150.001	3.1A Commercial Catalogs	51501	05230	Comm. - Materials	1.2.200	Product Development	200	100.00%	100.00	

Enter the ID to assign to this requisition, or leave blank if auto-assign is on for requisitions.

**Manage Purchase Requisitions / Apply PO Info to Requisitions**

Find: Query, Sort, Saved Queries

Search Criteria: Requisition ID: begins with MO0811, Requisitioner: begins with   
 This Requisition has an Org ID = 1.2.200   
 No rows met your query criteria. Count, Save Query, Reset, Find, Close

When you create a new requisition, the system validates the field as in the example below.

3. In the Accounting Defaults of the header section, use an inventory abbreviation with a material organization ID that is not authorized for the logged-in user AD005.

**Manage Purchase Requisitions / Apply PO Info to Requisitions**

Identification: Requisition ID: SAMPLE123, Rev: 0, Approval Process: AD12200, Status: Pending, Submit for Approval: ☐, Trans Currency: USD

Header: Accounting Defaults, Other Information, Notes, Assign PO Defaults, Security Requirements

Project:   
 Account:   
 Organization: 1.2.210, Field Operations, Proj Abbrev:   
 Proj Acct Abbrev:   
 Org Abbrev: 210   
 Inventory Abbrev: INV14, REF00001, REF00002

Requisition Lines: Req Line: 1, Status:   
 Line Type:   
 Item:   
 Misc:   
 Description:   
 Part Security:   
 Requested Date:   
 Req UIM:   
 Quantity:   
 Line SOW, Resources, Serial/Lot, Accounts, Line Charges, Line Text, Line Approvals, Currency Line, Line Documents, Proj Sub Parts, Link SCI/SAP Security Codes, Delivery Sched

Message(s): Error(s) Your user ID does not have access to the Organization linked to this Inv. Abbrev: INV14/1.2.200.

Use Case Scenarios

4. In the Accounting Defaults of the header section, use a project with an owning organization ID that is not authorized for the logged-in user AD005.

Manage Purchase Requisitions / Apply PO Info to Requisitions

Requisition ID: [ ] Rev: 0 Approval Process: AD12200 Status: Pending Submit for Approval Trans Currency: USD

Header Accounting Defaults Other Information Notes Assign PO Defaults Security Requirements

Project: AC41 Proj Abbrev: [ ]  
 Account: [ ] Proj Acct Abbrev: [ ]  
 Organization: 1.2.210 Field Operations Org Abbrev: 210  
 Inventory Abbrev: [ ] REF00001 REF00002 [ ]

Requisition Lines

Message(s)  
 Error(s)  
 Your user ID does not have access to the Project's Owning Organization linked to this Project: AC41/1.2.200.

5. Add a requisition line and use an inventory abbreviation with a project's owning organization ID that is not authorized for the logged-in user AD005.

Manage Purchase Requisitions / Apply PO Info to Requisitions

Requisition ID: RQ1031 Rev: 0 Approval Process: GLOBAL Status: Pending Submit for Approval Trans Currency: USD

Header Accounting Defaults Other Information Notes Assign PO Defaults Security Requirements

Requisitioner  
 Requisitioner\*: ADEMP005 YOO, ANNABELLE G  
 Organization: 1.2.210 Phone: [ ] Extension: [ ]  
 Subcontractor Agreement: [ ] Combine with Other Requisitions: [x] Requisition Printed: [ ]  
 Buyer: [ ]  
 Sales Tax/VAT Total: 0.00 Req Total: 0.00

Requisition Lines  
 Req Line: 1 Line Type: P Status: Pending Resource Exists: [ ]

Basic Information  
 Item: AD-INVT PART ORG SEC Rev: [ ] Misc Type: [ ] Req U/M: EA  
 Description: AD-INVT PART ORG SEC Part Security: Unrestricted Requested Date: 07/31/2018  
 Quantity: 1,111 Ship ID: WHSE1 SHIP ID Taxable: No Inventory Abbrev: 51501F  
 Estimated Cost Amounts  
 Cost Type: [ ] Unit Cost: 0.00 Extended Cost: 0.00  
 Line Charges: 0.00 Sales Tax/VAT Rate: 5.5500% Sales Tax/VAT: 0.00 Total Cost: 0.00

Message(s)  
 Error(s)  
 Your user ID does not have access to the Project's Owning Organization linked to this Inv. Abbrev: 51501F/1.2.200.

6. Add a requisition line and use an inventory abbreviation with a material organization ID that is not authorized for the logged-in user AD005.

## Use Case Scenarios

- Go to the Print Purchase Requisitions (PPRPRRQ) screen. From the Requisition range option, select **One** and enter any of the requisitions that were created in Scenario A or other requisitions where the requisitioner's organization IDs are not equal to the following: 1.2.200, 1.8, or 1.3.300.

- From the Requisition range option, select anything other than **One**, then select Print/Preview/Update Purchase Requisition printed flag; the system will only print/display/update



Use Case Scenarios

the printed flag of the record with a requisitioner's organization ID that is authorized for the logged-in user AD005.

**Note:** Costpoint will print the header information, but not the record details.

k & K Co									
Purchase Requisition									
Page 1 of 1 07/27/18 10:50 AM									
Requisition: MKA-092811		Rev: 10		Requisition Date: 09/28/11					
Requisitioner: Asaka, Leslie S C.P.A.									
Req Organization: 1.1.100									
Phone:		Ship ID: WHSE1 SHIP ID		Ship Name: WHSE1 SHIP ID					
Buyer:		Status: Rejected		Trans Currency: USD					
Line	Item/Description	Rev	U/M	Requested Date	Status	Requested Qty	Est Unit Cost	Estimated Costs	
1	Delivery Charge		EA	09/28/11	Rejected	20	\$20.00	\$400.00	
	Cert of Conf Required		QC Insp Required					\$400.00	
	Project	Account	Organization	Allocation					
	5150.001	05230	1.2.200	100.00%					
The S_WHERE_USED_CD = P and R for both 'Purchase Orders and Purchase Requisitions'. The AUTODFLT_FL = Y for both which means that this code will autoloading in RQ_HDR_TEXT and PO_TEXT. Regardless of the flag setting for the RQ_HDR_COMBINE_RQ_FL, this code should load in PO_TEXT because of it's S_WHERE_USED_CD.									
								Total Estimated Amount: \$400.00	
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									

k & K Co									
Purchase Requisition									
Page 1 of 1 07/27/18 10:50 AM									
Requisition: MKA-091605				Requisition Date: 09/16/11					
Requisitioner: Basinger, Lisa B									
Req Organization: 1.1									
Phone:		Ship ID: WHSE2 SHIP ID		Ship Name: WHSE2 SHIP ID					
Buyer:		Status: Pending		Trans Currency: USD					
Line	Item/Description	Rev	U/M	Requested Date	Status	Requested Qty	Est Unit Cost	Estimated Costs	
Requisition not printed - Your user ID is not authorized for the Requisitioner's Org on this requisition.									
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									

- Go to the View Purchase Requisition Status (RRQRQSTS) screen. In the **Requisition** field, enter the any of the requisitions that were created in Scenario A or other requisitions where requisitioner's organization IDs are equal to the following 1.2.200, 1.8, or 1.3.300. Upon execute, system displays an error message.

## Use Case Scenarios

**Requisition Status Inquiry-HDR**

Requisition:

Requisitioner:

Requisitioner Org:

Project:

Project Selection Criteria: Begins With

**Select Requisition Status**

☒ Pending ☒ Rejected ☒ PO Generated

☒ In Approval ☒ Closed ☒ Void

☒ Approved

**Requisition Status Inquiry**

Requisition	Req Rev	Subcontractor Agreement	Status	Requisition Date	Requisitioner	Requisitioner Name	Requisitioner Org	Organization Name	Trans Currency	Est Total Amt	Ex
Header SOW Req Hdr Text Req Hdr Approval Hdr Documents Req Lines RFQs Link SCI/SAP Security Cod											

**Message(s)**

Error(s) Your user ID does not have access to the Requisitioner's Organization linked to this requisition: 1.2.200.

Close

- Go to the Create Purchase Orders (PPPGPO) screen. In the Requisition range option, select **One** and enter any of the requisitions created in Scenario A or other requisition with requisitioner's organization ID that is equal to one of the following 1.2.200, 1.8, or 1.3.300.

Browse Applications > Materials > Procurement Planning > Purchase Requisitions > Create Purchase Orders

**Identification**

Parameter ID \*  Description \*

**Selection Ranges**

Buyer:  Option:  Start:  End:

Vendor:  Option:  Start:  End:

Requisition:  Option:  Start:  End:

Purchase Order:  Option:  Start:  End:

☐ Non-Contiguous Ranges

☐ Non-Contiguous Ranges

☐ Non-Contiguous Ranges

☐ Non-Contiguous Ranges

**Generate**

Purchase Order Line Sort \*

[Non-Contiguous Buyer Ranges](#) [Non-Contiguous Vendor Ranges](#) [Non-Contiguous Requisition Ranges](#) [Non-Contiguous Purchase Order Ranges](#)

**Message(s)**

Error(s) Your user ID does not have access to the Requisitioner's Organization linked to this requisition: 1.2.200.

Close

- From the Requisition range option, select from the option except **One**, then select either Print/Preview/Update Purchase Requisition printed flag. The system will only print/display/create PO for requisitions with requisitioner's organization ID that is authorized for the logged-in user AD005.

## Use Case Scenarios

**k & K Co**  
**Create Purchase Orders from Requisitions**  
 Page 6 of 89  
 07/27/18  
 12:55 PM

Line	Type	Item Description Manufacturer Part Vendor Part	Rev U/M	Requisition Line Misc Type	Qty Ordered Gross Cost Volume Disc Net Cost	Line Ext Amt Line Chg Amt Sales Tax Amt Line Total Amt	Due Date Desired Date Overship	Ship ID Deliver To Order Reference Inventory Abbrev	QC Source C of C
P		GFM-GRAS0619-MPS-10		R32817-1	10,000	\$340,000.00	03/28/17	VA-SHIP	Y
		TEST	EA	2	\$34.00	\$0.00	03/28/17		N
					0.00%	\$0.00	N		Y
					\$34.00	\$340,000.00		S1501F	
		<b>Project</b>	<b>Account</b>	<b>Organization</b>	<b>Allocation</b>	<b>Amount</b>			
		5150.001	51501	1.2.200	100.00%	\$340,000.00			
P		MPS 102116		R32817-1	10,000	\$340,000.00	03/28/17	VA-SHIP	Y
		MPS 102116	EA	3	\$34.00	\$0.00	03/28/17		N
					0.00%	\$0.00	N		Y
					\$34.00	\$340,000.00		S1501F	
		<b>Project</b>	<b>Account</b>	<b>Organization</b>	<b>Allocation</b>	<b>Amount</b>			
		5150.001	51501	1.2.200	100.00%	\$340,000.00			
<b>PO Total Amount:</b>									<b>\$700,000.00</b>

O: E100979    Release: 0    PO Type: P    Buyer: MASTER    Buyer's Org: 1    Trans Currency:

Vendor: 1099CO1ALL    1099CO1ALL (FED) COMPANY1    Contact:

Order Date: 07/27/18    Status: O    Terms: 1 MO    FOB Point:

PO not created - Your user ID is not authorized for the Requisitioner's Org linked to this purchase order.

O: E100982    Release: 0    PO Type: A    Buyer: A001    Buyer's Org: 1    Trans Currency:

Vendor: 1099CO1ALL    1099CO1ALL (FED) COMPANY1    Contact:

Order Date: 07/27/18    Status: O    Terms: 1 MO    FOB Point:

PO not created - Your user ID is not authorized for the Requisitioner's Org linked to this purchase order.

12. Go to the Print Purchase Requisition Commitment Report (PPRCOMT) screen. The system will only print/display requisitions with requisitioner's organization ID that is authorized for the logged-in user AD005. In the report, the details of the requisitions not authorized for the user are suppressed, but the amounts are still included in the total amounts for the report.

**k & K Co**  
**Purchase Requisition Commitments Detail**  
 By Proj/Acct/Org  
 Page 1 of 49  
 09/02/18  
 02:26 PM

Requisition	Line	Item/Description	Rev	Line Type/Status	U/M	Requested Date/Trans Currency	Requested Qty/PO Generated Qty	Est Net Unit Cost/Allocation %	Open Req Line Amt
Project: 0300 CPFFTL									
Account: 00001-100									
Organization: 1 DELTEK									
RQ0912    1 Requisition not printed - Your user ID is not authorized for the Requisitioner's Org on this requisition.									
								Subtotal for Proj / Acct / Org:	\$0.00
								Subtotal for Proj / Acct:	\$0.00
Account: 01100-011									
Organization: 1.2.210    210									
710		1.3105C28-20		Part	EA	03/23/15	10	\$0.00	\$0.00
		BOLT-U REF NIAS3105C28-20		In-Approval	USD		0.00	100.00%	
								Subtotal for Proj / Acct / Org:	\$0.00
								Subtotal for Proj / Acct:	\$0.00
Account: 05230									
Organization: 1.2.200    200									
RQ001-0034    1 Requisition not printed - Your user ID is not authorized for the Requisitioner's Org on this requisition.									
RQ001-0038    1 Requisition not printed - Your user ID is not authorized for the Requisitioner's Org on this requisition.									
								Subtotal for Proj / Acct / Org:	\$5,905.00
								Subtotal for Proj / Acct:	\$5,905.00
								Total for Project:	\$5,905.00
Project: 0300.001 CPFFR1									
Account: 05230									

Details of the requisitions not authorized for the user are suppressed, however, the amounts are still included in the "total amounts" for the report.

## Scenario D

This scenario presents validations when organization security is previously disabled and the Requisitioner's Org is left blank. When users enabled the organization security, the system only displays and makes accessible requisitions where the user has full rights to and records with requisitioner's organization.

## Use Case Scenarios

Log in to Costpoint as user JE22USER and go to the PPMNTRQ1 screen to query records.

Prior to running the Load Organization IDs (PPPLDORG), there are only 1016 records that can be accessed by users JE22USER and all requisitions have requisitioner's organization ID beginning with 1.2 only.

In order to populate the requisitioner's organization to previously saved requisitions, you must run PPPLDORG utility.



## Use Case Scenarios

SuperTech, Inc. Testing the maximum  
Requisition Source Organization Report

Page 09/06 of 518  
11:22 PM

AD-TTAR000	AD001	09/12/14	P	12
AD-R000001	AD001	07/27/11	P	12
AD-R000002	AD001	07/27/11	P	12
AD-R000003	AD001	07/27/11	P	12
AD-R000004	9443	08/10/15	P	12
AD-R15657	AD001	01/25/11	A	12
AD-REQ0001	AD001	08/16/11	P	12
AD-RQ00010	AAAAAAAAAAAA	02/17/14	P	12
AD-RQ00015	AD001	03/04/14	P	12
AD-RQ00041	AD001	04/09/14	P	12
AD-RQ00042	AD001	04/09/14	P	12
AD-RQ00043	AD001	04/09/14	P	12
AD-RQ00044	AD001	04/09/14	P	12
AD-RQ00045	AD001	04/09/14	P	12
AD-RQ00046	AD001	04/09/14	P	12
AD-RQ00054	AD001	05/05/14	P	12
AD-RQ00102	9443	07/23/14	P	12

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

After running the Load Organization IDs (PPPLDORG), the number of records that can be retrieved by user JE22USER has increased to 1166 requisitions.

Manage Purchase Requisitions / Apply PO Info to Requisitions

Find Query Sort Saved Queries

Search Criteria

Requisition ID begins with

Requisitioner begins with

1166 records will be returned

Count Save Query Reset

Find Close

1 of 1,016 Existing

Submit for Approval Trans Currency USD

Requisition Date \* 02/06/2012

Target Place Date 02/06/2012

Date Entered 02/06/2012

Buyer Assignment Date

Procurement Type

Change Rates Hdr Documents Link SCI/SAP Security Cod

New Form Query

Part Security Request Date

Sub Parts Link SCI/SAP Security Codes Delivery Sched

## Scenario E

This scenario contains validations when approval purchase requisitions is enabled.

Logged-in User Info

## Use Case Scenarios

Manage Employees Information (LOMERINFO)			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
5.002	ORGSECEMP4		ORGSECEMP4	ORGSEC-USR-4	PASSWORD	OSGRP4	OS-4	YES	Both	Full	Equals	4.100.A00.0010.10
										Full	Equals	4.100.C00
										Full	Equals	4.300.A00
										Full	Equals	5.002
1.2	ORGSECEMP1		ORGSECEMP1	ORGSEC-USR-1		OSGRP1	OS-1	Yes	Both	Full	Begins With	1.2
										Full	Equal	1.2.200
										None	Equal	1.2.210
										None	Equal	1.3
5.002	ORGSECEMP4		ORGSECEMP4	ORGSEC-USR-20		OSGRP20	OS20	Yes	Inclusive	None	Equals	4.100.A00.0010.10
										Full	Begins With	1
										Full	Equal	2.GBR
										Full	Equals	2.USA
	ORGSECEMP2		ORGSEC-USR-2			OSGRP2	OS-2	Yes	Inclusive	Full	Begins With	2.UAS.E
										Full	Begins With	2
										Full	Equal	2.GBR
										Full	Equals	2.USA
										Full	Begins With	2.UAS.E
										Full	Equal	4.100.C00
										Full	Equals	4.300.A00
										Full	Equals	

### Approval Process Info

Approval Process	Approval Title Sequence	Approval Title	Approval Title User Sequence	Approval Title User	Employee ID
KES-ORG	1	KES-ORGSEC02	1	ORGSEC-USR-20	ORGSECEMP4
	2	KES-ORGSEC2	1	ORGSEC-USR-2	ORGSECEMP2
KES-ORGX	1	KES-ORGSEC1	1	ORGSEC-USR-1	ORGSECEMP1
	2	KES-ORGSEC02	1	ORGSEC-USR-20	ORGSECEMP4

1. Log in as user ORGSEC-USR-4 and go to the Manage Purchase Requisitions (PPMNTRQ1) screen.
2. Enter all required fields and KES-ORGX as **Approval Process**.
3. Select **Submit for Approval** check box and click **Save**.

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

## Use Case Scenarios

The screenshot shows the SAP 'Manage Purchase Requisitions / Apply PO Info to Requisitions' screen. The 'Approval Process' is set to 'KES-ORGX'. A red arrow points from this field to an error message in the 'Message(s)' section. The error message states: 'Requisition requires approval but none of the approver(s) for one or more of the approval title(s) is authorized for the Requisitioner's Organization ID'. Below the error message, there are 'Warning(s)' and 'Close' buttons.

4. Log in as user ORGSEC-USR-4 and go to the Manage Purchase Requisitions (PPMNTQR1) screen.
5. Enter all required fields and KES-ORG as **Approval Process**.
6. Select **Submit for Approval** check box and click **Save**.

An error message displays because only ORGSECEMP2 is authorized for the requisitioner's organization.

The screenshot shows the same SAP screen, but with the 'Requisition ID' changed to 'RQ-ORSEC-1'. The 'Approval Process' is still 'KES-ORG'. A red arrow points from this field to a warning message in the 'Message(s)' section. The warning message states: 'Requisition requires approval but not all of the approver(s) for one or more of the approval title(s) is authorized for the Requisitioner's Organization ID'. Below the warning message, there are 'Ok', 'Cancel', and 'Press OK to continue or CANCEL to abort.' buttons, along with a 'Close' button.

## Appendix: If You Need Assistance

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

### Customer Services

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

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

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

### Deltek Support Center

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

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

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

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

## Access Deltek Support Center

To access the Deltek Support Center:

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

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

## Additional Documentation

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

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



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## 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](http://www.deltek.com)